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2023

Q3

TV TRANSPARENCY REPORT

Turning On (More) Transparency For TV

The summer season and entertainment work stoppages underscored the pressing need for transparency in the TV ad industry. Amid a landscape with limited major programming events, advertisers had to adapt to reach audiences — who remained engaged with TV, albeit in a different manner.

In Q3 2023, household TV ad impressions saw a modest 1.4%, year-over-year growth, while estimated national TV ad spend dipped by 5.95%. Despite the absence of high-cost tentpole events, ads continued to reach and resonate with viewers tuning into favorites like *Friends*, *NCIS* and *Everybody Loves Raymond*. However, the real value of these re-airs as effective reach vehicles can only be fully understood through comprehensive measurement.

The industry also witnessed efforts that aim to address the demand for transparent measurement and currency. The Joint Industry Committee (JIC) led the way by conditionally certifying new currencies, among them iSpot, as part of their ongoing mission to establish industry standards. In parallel, the Media Ratings Council (MRC) accredited national TV ad occurrence reporting from iSpot — which is powered by the same ad catalog that underpins the insights featured in this report.

The following pages provide an in-depth exploration of Q3 TV ad trends and top performers. Continue reading to uncover key insights from retail, QSR, CPG, pharma and beer brands as well as takeaways for TV advertisers looking to gain a competitive edge and better reach and resonate with audiences.

Q3 2023 TV Advertising By the Numbers

*First-airing, linear TV (excluding Regional Sports Networks)

2.15T HH TV Ad Impressions*	**+1.4%** YoY Change in TV Ad Impressions	**599** Avg. Ad Likeability
$8.18B Est. National TV Ad Spend	**-5.95%** YoY Change in Spend	**9.3MM** Total TV Ad Minutes

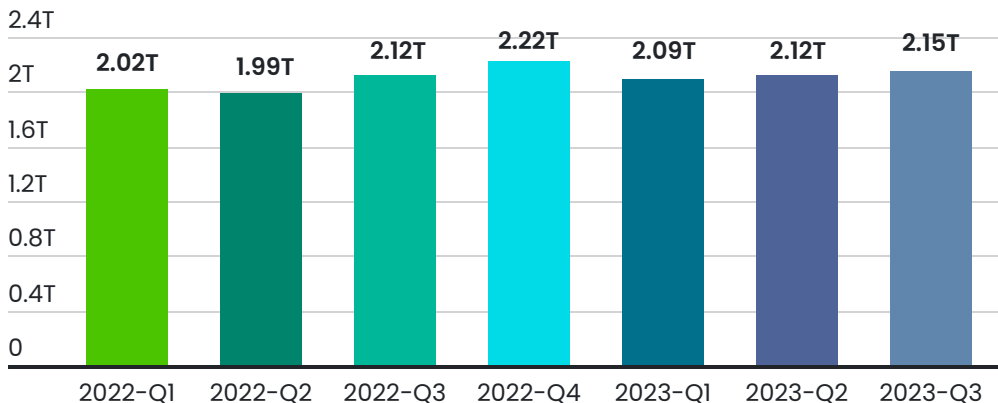iSpot.tv

Key Industry Trends

#1   **Morning Shows, Re-Airs Net Attention For Retail:** In Q3, some retail brands outperformed expectations while leaning into passive viewing experiences like morning shows and drama re-airs that can keep audiences locked in for hours.

#2   **QSR Brands Land Humor:** Viewers found 95% of QSR video ads funny in Q3 - the most of any industry. Spots from Jimmy John's, Jack in the Box, and Jersey Mike's led the pack, with several celebrities making appearances in creatives.

#3   **CPG Gets Soapy:** CPG brands increased Q3 daytime TV ad impressions by over 14% YoY thanks in part to significant boosts during daytime soap operas like *The Young and the Restless* (+26% YoY) and *General Hospital* (+48% YoY).

#4   **Pharma Makes Headlines:** Prescription brands continued to emphasize advertising during news programs, both as a vehicle to create awareness around new drugs and to renew awareness about existing Rx options.

#5   **Beer Still Bubbles Up:** Beer brands advertised big during NFL games in Q3, but also flocked to WNBA and Women's World Cup action — along with telenovelas (as was the case for Michelob Ultra).
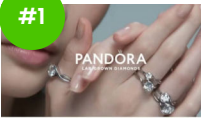
TV Ad Impressions Quarter-over-Quarter

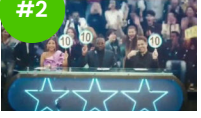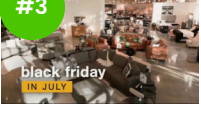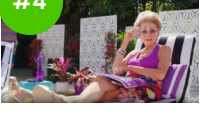| Quarter	Impressions
2022-Q1	2.02T
2022-Q2	1.99T
2022-Q3	2.12T
2022-Q4	2.22T
2023-Q1	2.09T
2023-Q2	2.12T
2023-Q3	2.15T

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Retail Finds Success With Passive Viewing

Retail brands captured audience attention in Q3, particularly during more passive viewing experiences — either re-airs (NCIS/Law & Order: SVU) or longer morning shows and news programs that audiences tuned into for extended periods of time. These retail ads often highlighted time-sensitive deals, adding a sense of urgency to their messages. That was the case for advertisers below like Amazon Prime, Ashley HomeStore, Wayfair and Tempur-Pedic, which all outperformed expectations relative to each brand's respective Q3 ad buys.

Understanding how ads retain or lose audience attention helps brands across industries optimize ad spend and effectively match ads with the best-fitting audience. Continuously monitoring ad performance also enables quick adjustments when spots start to show signs of creative wear.

Top Retail Ads by Attention Index in Q3

#1

PANDORA

Pandora: "Never Enough"

Attention index: 17% above expected
TV Ad Impressions: : 690 million
Top Network by Impresssions: ABC
Top Program: Good Morning America

#2

prime

Amazon Prime: "Big Deal - Dog Walk"

Attention Index: 8% above expected
TV Ad Impresions: 553 million
Top Network By Impressions: NBC
Top Program: Today

#3

ASHLEY

Ashley HomeStore: "Why Wait - Shop Doorbusters"

Attention Index: 6% above expected
TV Ad Impressions: 510 million
Top Network by Impresions: CBS
Top Program : CBS Evening News

#4

wayfair

Wayfair: "Outdoorsy Summer"

Attention Index: 6% above expected
TV Ad Impressions: 427 million
Top Network by Impressions: ION
Top Program: NCIS

#5

TEMPUR-PEDIC

Tempur-Pedic: "Makes Sleep Feel Cool Save $500"

Attention Index: 5% above expected
TV Ad Impressions: 810 million
Top Network by Impressions: CNN
Top Program: CNN News Central

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Celebrities and Product Punchlines Drove Laughs for QSR Brands

Humor was prevalent among QSR ads in Q3, with viewers finding 95% of all ads in the category funny to some degree. Brands paired celebrities with product punchlines to successfully land humor - as seen among the top 3 funniest QSR ads from Q3. Sonic and Arby's rounded out the top 5 with comical cultural references (like Kelis' "Milkshake) and/or product close-ups that drove above norm levels of top-2 box purchase intent.

27% of all Q3 video ads scored on Funny
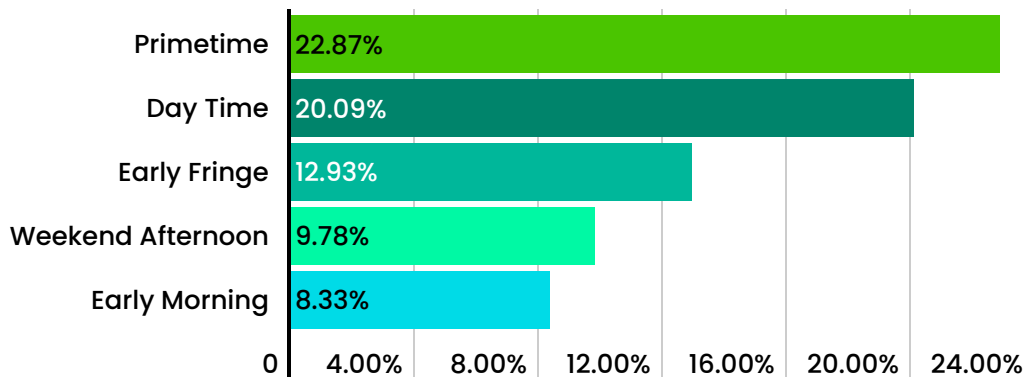
95% of Q3 QSR video ads scored on Funny

Funniest QSR Video Ads from Q3

#1 Jimmy John's: "Here to Stay"

Likeability Score: 675 (39th percentile)
Brand Recognition: 73% (7% below norm)
Positive Purchase Intent: 61% (4% below norm)
Single Best Thing: Product Itself

#2 Jack in the Box: "Trust Fall"

Likeability Score: 649 (17th percentile)
Brand Recognition: 74% (6% below norm)
Positive Purchase Intent: 50% (5% below norm)
Single Best Thing: Product Itself

#3 Jersey Mike's: "Rhythm of the Slice"

Likeability Score: 764 (100th percentile)
Brand Recognition: 79% (1% below norm)
Positive Purchase Intent: 71% (6% above norm)
Single Best Thing: Characters

#4 Sonic Drive-In: "My Milkshake"

Likeability Score: 755 (99th percentile)
Brand Recognition: 90% (10% below norm)
Positive Purchase Intent: 79% (14% above norm)
Single Best Thing: Music

#5 Arby's: "Whee"

Likeability Score: 735 (93rd percentile)
Brand Recognition: 89% (9% above norm)
Positive Purchase Intent: 72% (7% above norm)
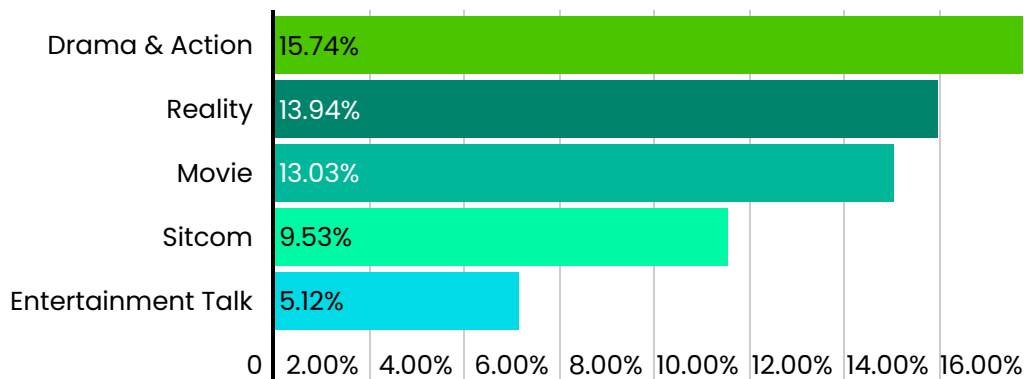**Single Best Thing:** Product Itself

*Likeability, Brand Recognition and Positive Purchase Intent are benchmarked against gen pop, QSR category video ad norms July 1-Sept. 30, 2023.

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CPG Knows Drama (and Talk Shows)

(Data from July 1 - Sept. 30; all airings)

Top CPG Dayparts by TV Ad Impressions SOV

Daypart	SOV
Primetime	22.87%
Day Time	20.09%
Early Fringe	12.93%
Weekend Afternoon	9.78%
Early Morning	8.33%

Axis: 0, 4.00%, 8.00%, 12.00%, 16.00%, 20.00%, 24.00%

Top CPG Program Genres by TV Ad Impressions SOV

Genre	SOV
Drama & Action	15.74%
Reality	13.94%
Movie	13.03%
Sitcom	9.53%
Entertainment Talk	5.12%

Axis: 0, 2.00%, 4.00%, 6.00%, 8.00%, 10.00%, 12.00%, 14.00%, 16.00%

- Primetime CPG TV ad impressions grew slightly YoY in Q3 as brands focused re-airs of programs like *Everybody Loves Raymond* and crime procedural re-airs, plus *America's Got Talent* and (come September) college football.
- Daytime CPG TV ad impressions grew as well, thanks to significant increases during programs like *The Young and the Restless* (+26% YoY) and *General Hospital* (+48% YoY).
- Entertainment talk shows stayed at No. 5 YoY by Q3 TV ad impressions for CPG brands, but that total also jumped by 29.7% as those programs aired more ads as well.

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Pharma Advertisers Emerge During News

Pharma companies invest significantly into TV advertising, both to promote new prescription drugs as they become available, and to unveil new creative approaches around existing brands. In Q3 2023, the pharma brands that saw the largest increases in year-over-year TV ad impressions put a lot of focus on evening and morning news shows. However, those brands were also appearing during daytime programming like *The Price Is Right*, *General Hospital*, *The Young and the Restless* and other shows in the entertainment genre.

Most-Seen "Rising" Rx Pharma Brands, by TV Ad Impressions

("Rising" indicates advertisers that either didn't appear in Q3 2022 or increased ad impressions by the highest percentage - min. 1 billion ad impressions in Q3 2023)

Rank	Brand	Q3 TV Ad Impressions	YoY Ad Impressions Increase	Rx Industry
#1	Skyrizi (Crohn's Disease)	2.29B	N/A	Bladder & Gastrointestinal
#2	VABYSMO faricimab-svoa injection 6 mg	1.74B	N/A	Auditory & Vision
#3	AREXVY RESPIRATORY SYNCYTIAL VIRUS VACCINE (RECOMBINANT, AS01E ADJUVANTED)	1.64B	N/A	Allergies, Cold & Flu
#4	SOTYKTU	1.63B	N/A	Psoriasis, Skin & Nails
#5	mounjaro	1.60B	N/A	Diabetes & Blood Disorders
#6	Apellis	1.31B	N/A	Auditory & Vision
#7	Vraylar (cariprazine) capsules 1.5mg-3mg-4.5mg-6mg	3.91B	+504%	Depression, Bipolar & Insomnia
#8	Opzelura (ruxolitinib) cream 1.5%	1.06B	+61.4%	Psoriasis, Skin & Nails
#9	Skyrizi (Psoriatic Arthritis)	1.77B	+49.3%	Osteoperosis & Arthritis
#10	DUPIXENT (dupilumab) Injection 200mg · 300mg (Eczema)	5.04B	+39.2%	Psoriasis, Skin & Nails

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Beer Bubbles Up During Sports (and Beyond)

+67%
WNBA YoY beer advertiser growth in Q3

42.8%
Truly Hard Seltzer's share of of beer TV ad impressions during the Women's World Cup

›34%
Share of Modelo (the No. 1 beer advertiser) Q3 TV ad impressions were delivered against sports programming

2.4%
Share of Q3 beer ad impressions during Spanish-language sports

60%
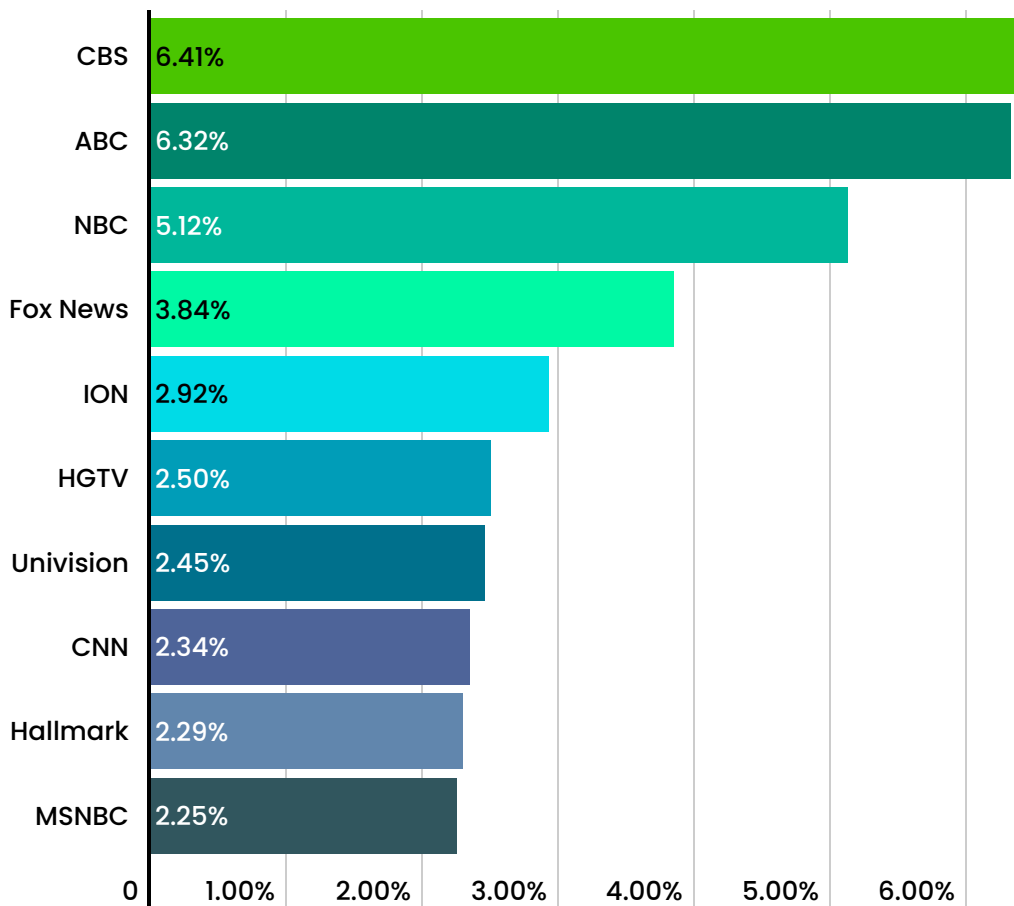Bud Light TV ad impressions delivered during football-related programming

›23%
Michelob Ultra Q3 TV ad impresions delivered during telenovelas

#5
Beer's industry rank by NFL TV ad impressions in Q3

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News, Talk Programs Score For Broadcast

Top Networks by TV Ad Impressions SOV (July 1 – Sept. 30; all airings)

Network	SOV
CBS	6.41%
ABC	6.32%
NBC	5.12%
Fox News	3.84%
ION	2.92%
HGTV	2.50%
Univision	2.45%
CNN	2.34%
Hallmark	2.29%
MSNBC	2.25%

- Nearly 50% of ABC's Q3 TV ad impressions were delivered by news and talk programs, as *Good Morning America* and *ABC World News Tonight* combined for 26% on their own.
- Quiz & giveaway shows accounted for over 19% of CBS TV ad impressions, but talk and news were still over 25% of ad impressions as well (meanwhile, soaps for 14%).
- Over 40% of NBC TV ad impressions were news and talk related, but reality also provided 15.8%, while just a month of pro and college football delivered 12.3%.

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House Hunters Building TV Ad Juggernaut

Top Programs by TV Ad Impressions SOV (July 1 - Sept. 30; all airings)

Program	SOV
College Football	2.09%
National Football League	2.05%
Law & Order: SVU	1.25%
Good Morning America	0.94%
NCIS	0.94%
Friends	0.93%
Today	0.72%
ABC World News Tonig...	0.72%
The Price Is Right	0.72%
House Hunters	0.71%

(x-axis: 0, 0.40%, 0.80%, 1.20%, 1.60%, 2.00%)
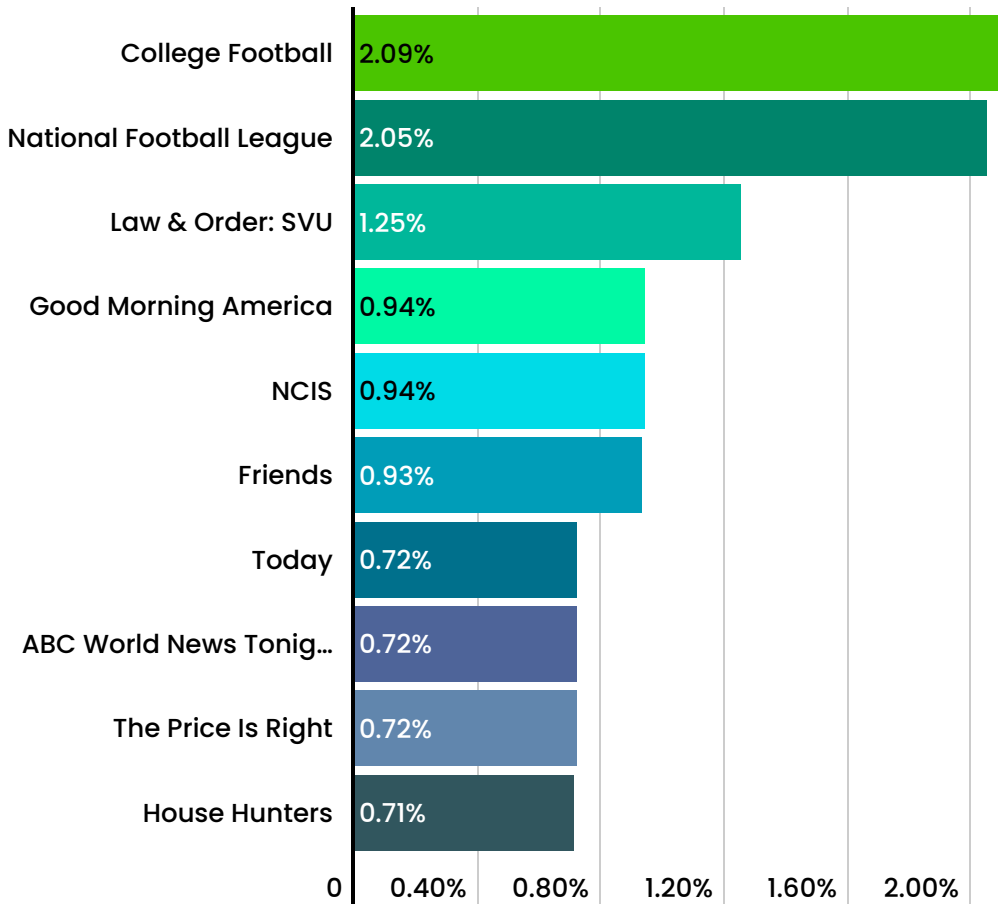
- Increased college football exposure on networks like CBS and NBC (new Big Ten deals) and CW (new ACC deal) helped fuel a 54.5% YoY increase in TV ad impressions for the sport in Q3 2023.
- Morning show staples *Good Morning America* and *Today* both saw TV ad impressions increases YoY, though both programs also aired slightly more ads YoY as well.
- *House Hunters* skyrocketed as a vehicle for ad reach, as re-airs of the program grew ad impression deliveries by 183% YoY.

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Brands Go Big, Even Minus "Big" Programs

In the absence of scripted programs and with limited sports content, top advertisers relied on ad impressions in less obvious places. Many of the top shows for Domino's ad deliveries were crime procedurals, along with *Friends* re-airs. Over 21% of Liberty Mutual TV ad impressions came via cable news networks. Additionally, Downy achieved more than 24% of its ad impressions during daytime programming.

Some advertisers experienced substantial year-over-year growth, as Burger King, Wendy's, GOLO and Chevrolet all saw leaps by more than 10 spots compared to Q2 2022's most-seen brand advertisers.

Most-Seen Brands in Q3 2023, by TV Ad Impressions SOV

Rank	Brand	Impressions SOV	YoY Rank Change	Industry
#1	PROGRESSIVE	0.79%	+1	Auto & General Insurance
#2	Domino's	0.79%	−1	Pizza
#3	Liberty Mutual	0.63%	+3	Auto & General Insurance
#4	Downy	0.60%	+3	Laundry Detergent
#5	SUBWAY	0.56%	−2	QSR
#6	BURGER KING	0.55%	+17	QSR
#7	verizon	0.48%	+5	Wireless
#8	GOLO	0.48%	+11	Weight Loss
#9	Wendy's	0.47%	+11	QSR
#10	CHEVROLET	0.46%	+16	Automaker

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Streamers Betting on Football Audiences

Streaming services continue to prioritize subscriber growth and customer retention, but Q3 presented unique challenges due to entertainment industry disruptions. Enter football season, which gave many of the NFL's media partners a valuable opportunity to attract streaming service sign-ups through TV promos. NFL games delivered 9% of Q3 promo ad impressions for streaming services (No. 1 among all programs), while college football ranked second with 3.2%. Notably, eight out of the top ten most-seen streaming services by promo SOV in Q3 are affiliated with parent companies that have secured NFL game rights deals, including Paramount, NBCU, Disney, Fox, Google, and Amazon.

Most-Promoted Streaming Services On TV, By Ad Impressions SOV
(This represents streaming service promos, not advertising on these platforms)

Rank	Streaming Service	Impressions SOV	YoY Rank Change	Parent Co.
#1	Paramount+	16.42%	+1	Paramount Global
#2	Disney+	10.85%	−1	Walt Disney Co.
#3	hulu	10.80%	−−	Walt Disney Co.
#4	max	8.30%	+7	Warner Bros. Discovery
#5	prime video	6.18%	−1	Amazon
#6	peacock	6.02%	−−	NBCUniversal
#7	YouTube TV	4.45%	+31	Google
#8	pluto tv	4.38%	−3	Paramount Gobal
#9	FOX NATION	3.86%	+1	Fox Corporation
#10	sling	3.54%	−1	DISH Network Corp.

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Subaru Topped Most Likable Ads from Q3

Subaru secured two of the top five most likable spots with ads from its long-standing "Dog Tested" campaign. The brand successfully resonated with audiences and continued the momentum of a memorable ad campaign with cute characters, engaging storytelling and enticing product features. Meanwhile, Oreo entertained with a Mario tie-in spot that sparked feelings of Nostalgia while Olive Garden and Applebee's captivated viewers with mouthwatering visual scenes.

#1

"Dog Tested: Everybody In"

SUBARU

Likeability Score*: 799 (100th percentile)
Brand Recognition: 86% (6% above norm)
Positive Purchase Intent: 40% (4% below norm)
Top Emotion: Narrative
Single Best Thing: Characters

Viewer Verbatim Comments

"It was great and cute. The car wasn't lost and I could see where the commercial was going. Short, sweet and simple." - Female 21-35

"Ads with animals are always great. Most people don't like ads, but when there's animals I tend to stop and watch. I thought it was charming, and the music was cute." - Male 21-35
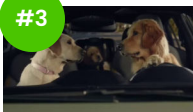
#2

OREO

Oreo: "Mario Theme"

Likeability Score: 797 (100th percentile)
Brand Recognition: 87% (31% above norm)
Positive Purchase Intent: 74% (15% above norm)
Top Emotion: Love It

#3

SUBARU

Subaru: "Dog Tested: On Repeat"

Likeability Score: 773 (99th percentile)
Brand Recognition: 77% (3% below norm)
Positive Purchase Intent: 50% (6% above norm)
Top Emotion: Cute

#4

Olive Garden ITALIAN KITCHEN

Olive Garden: "We're All About Giving You More"

Likeability Score: 771 (100th percentile)
Brand Recognition: 86% (5% above norm)
Positive Purchase Intent: 75% (15% above norm)
Top Emotion: Yummy

#5

Applebee's GRILL + BAR

Applebee's: "Saucy"

Likeability Score: 768 (97th percentile)
Brand Recognition: 96% (15% above norm)
Positive Purchase Intent: 67% (7% above norm)
Top Emotion: Yummy

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Looking Toward TV's Clearer Future

As legacy, black-box solutions give way to modern and transparent TV measurement capabilities, the industry is at an important crossroads. With audience migrations, the surge in streaming, the unpredictability of TV seasons and escalating sports rights costs, the TV landscape is being reshaped by disruptive forces. However, aidst these changes, the one constant is the need for clear insights into the performance of TV ad campaigns.

Advertisers cannot afford to wait until they start lagging behind competitors in terms of ad reach, and networks must possess real-time insights into the value of each program within every daypart. It's time to embrace TV transparency. Get in touch with iSpot today to learn more.

TV Measurement Shouldn't Be a Black Box

Gain complete transparency into your TV ad campaign performance with iSpot. **Every ad, every impression, every second.** Contact us now to learn more about Q3 TV advertising and how iSpot can empower you to make more informed decisions about your ad investments.

Contact Us

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GLOSSARY

Est. National TV Ad Spend: The estimated amount spent on TV ad airings (how much it costs).

TV Ad Impressions: TV ad exposures captured across 52 million smart TVs and set-top boxes which are extrapolated and balanced with census data for an accurate representation of US households.

Impressions Share of Voice (SOV): The percentage of impressions generated by a brand or ad compared to the total impressions generated by the selected criteria.

Attention Index: A comparison of your ad's Interruption Rate against your specific media placement. The Attention Index is measured on a scale of 0 to 200, where 100 is the average and means your ad is performing as expected.

Interruption Rate: The percentage of devices that were present at the beginning of an ad but did not complete watching the ad. Actions that interrupt ad play include changing the channel, pulling up the guide, fast-forwarding, or turning off the TV. The Interruption Rate is measured on a scale from 0 to 100%.

Likeability Score: Measures the extent to which Creative Assessment survey respondents like a video ad. Scores range from 1-950.

Brand Recognition: Measures the strength of a brand's and/or product's presence in the creative. Equals the percent of Creative Assessment survey respondents that accurately identified a brand (unaided) after watching an ad.
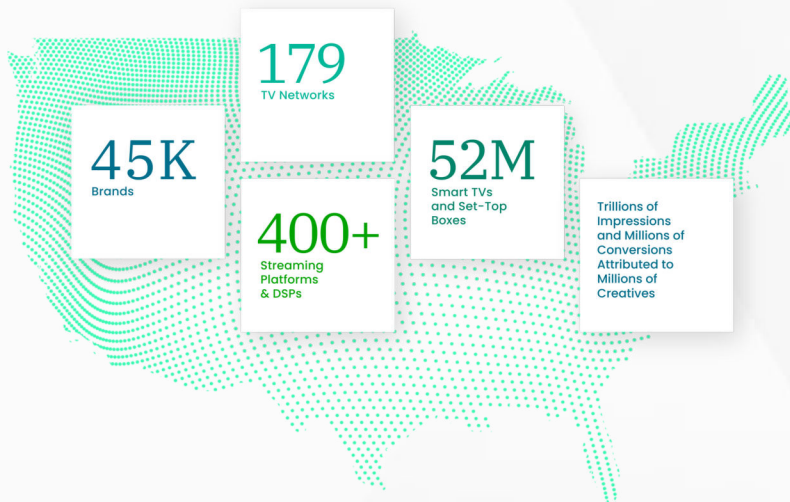
Positive Purchase Intent: The percent of survey respondents that reported an increased desire to purchase or visit a given brand or product after watching a video ad.

Top Emotion: Refers to the 57 emotional metrics iSpot Creative Assessment measures for every TV and video ad. Measurement is derived from viewer verbatim comments using Natural Language Processing and machine learning techniques. Scores are relative to every other ad in the expansive Ace Metrix LIVE database. The top emotion represents the strongest feeling(s)/reaction(s) gen pop viewers have in response to a video ad.

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About iSpot.tv

iSpot.tv helps advertisers measure the brand and business impact of TV and streaming advertising, from concept to airing to conversion. Fast, accurate and actionable measurement and attribution solutions enable advertisers to assess creative effectiveness, enhance media plans and attribute advertising results, all while benchmarking against competitors and historical norms.

Unlike legacy and ad hoc solutions, iSpot is purpose-built to measure the performance of every ad on television with digital-like precision and granularity in real time. With always-on performance insights unified across linear and streaming TV, advertisers can take quick and confident action to consistently drive business results.

179
TV Networks

45K
Brands

400+
Streaming Platforms & DSPs

52M
Smart TVs and Set-Top Boxes

Trillions of Impressions and Millions of Conversions Attributed to Millions of Creatives

Data Footprint

- 45K brands
- 2 million creatives
- 179 TV networks
- 210 Media Markets
- 400+ streaming platforms and DSPs
- 52 million smart TVs and set-top boxes
- Trillions of impressions & millions of conversions attributed to millions of creatives
- 120,000+ video ads with creative assessment data

Data Quality

- Patented ad and impression detection processes and software
- 40 around-the-clock human editors
- Best-in-class data science, processing and modeling
- Rigorous quality assurance and data integrity for survey-based creative assessment

Corporate Facts

- Founded in 2012
- Over 600 customers across brands, agencies, publishers and movie studios
- Over 350 US-based employees

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