



# H1 2025

## TV & VIDEO TRANSPARENCY REPORT

Ad-First Insights, Shaping What's Next



# Ad-Level Trends in a Shifting TV Landscape

**Go beyond averages and stitched-together metrics—this is H1 ad performance at the creative and placement level.**

Streaming's climbing, linear's in flux, and advertisers are trying to prove impact in a landscape that won't sit still.

But the biggest snag? Traditional TV measurement wasn't built for cross-screen, multi-platform ad strategies.

Instead, marketers are stuck stitching together apples-and-oranges data that takes too long to act on. It's time for a fast, precise read on deduplicated reach and creative-level performance (made to move at the pace campaigns actually run).

That's where ad-level data comes in. It cuts through platform silos and program averages to show exactly which creatives and placements delivered results. Brands can scale what's working and course-correct what's not—before media dollars are used up.

This report provides a snapshot of what moved the needle in H1 2025 at that ad-first measurement level—across streaming, linear, verticals, sports, and creative performance.

Let's dive in!

## Tired of stitched-together solutions?

Spot connects everything under one roof—from airings and creative assessment to advanced audiences and outcomes.

[Contact iSpot](#)



# H1 Market Snapshot & Key Metrics

**43.52%**

Increase in  
Streaming's Share of  
Impressions since  
Jan. 2025

**16.49%**

Streaming's Share of  
Ad Impressions in  
June 2025

(vs. 11.49% in January)

**PROGRESSIVE**

Most-Seen Brand on  
Both Streaming and  
Linear



Funniest Video Ad  
with "Crash the Super  
bowl - Abduction"

**3.57T**

H1 Household TV Ad  
Impressions

(-5.54% YoY)

**\$21.85B**

H1 Est. National Linear  
TV Ad Spend

(+3.29% YoY)

**\$4.21B**

H1 Primetime Big 4  
Est. TV Ad Spend

(+12.99% YoY)

**241.09B**

H1 Primetime Big 4 TV  
Ad Impressions

(+3.16% YoY)

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# 2025 Predictions Taking Shape

Back in January, iSpot released a predictions guide: [Nine Things That Will Reshape Video Advertising in 2025](#). Fast forward to the end of H1 and several predictions have come to life—validated by shifts in strategy, partnerships, and the data behind today’s TV ad performance.

## Linear Ad Formats Still Drive Massive Reach

In H1 2025, linear TV made up 86% of total TV ad impressions and averaged nearly 17 billion impressions per day, with view rates<sup>1</sup> consistently topping 95%. Live sports fueled momentum: Men’s March Madness impressions climbed 15.5% YoY, and the NBA Playoffs rose 16% YoY.

## But There’s a Renewed Focus on Outcomes

Outcome-based TV measurement hit the mainstream, and Paramount is leading the way—[partnering with iSpot](#) to make creative-level performance available at scale. As pressure mounts for proof that media investments are driving business impact, this collaboration marks a step forward in delivering greater accountability.

## Meanwhile, Fragmentation Continues to Accelerate the FUD

WBD’s plan to split into two companies? Just one headline in a sea of fragmentation, highlighting the ongoing shake-ups in the media landscape. As platforms restructure, measurement that can truly deduplicate audiences is quickly becoming table stakes for brands looking to navigate the fragmentation and prove performance.

## And Media & Agency Consolidations Re-Invigorate In-Housing

Control and clarity are in high demand. More advertisers are building direct data pipelines to power faster insights. That shift depends on real-time ad exposure data that’s scalable, precise, and reliable—areas where iSpot’s DaaS and data quality play a key role.

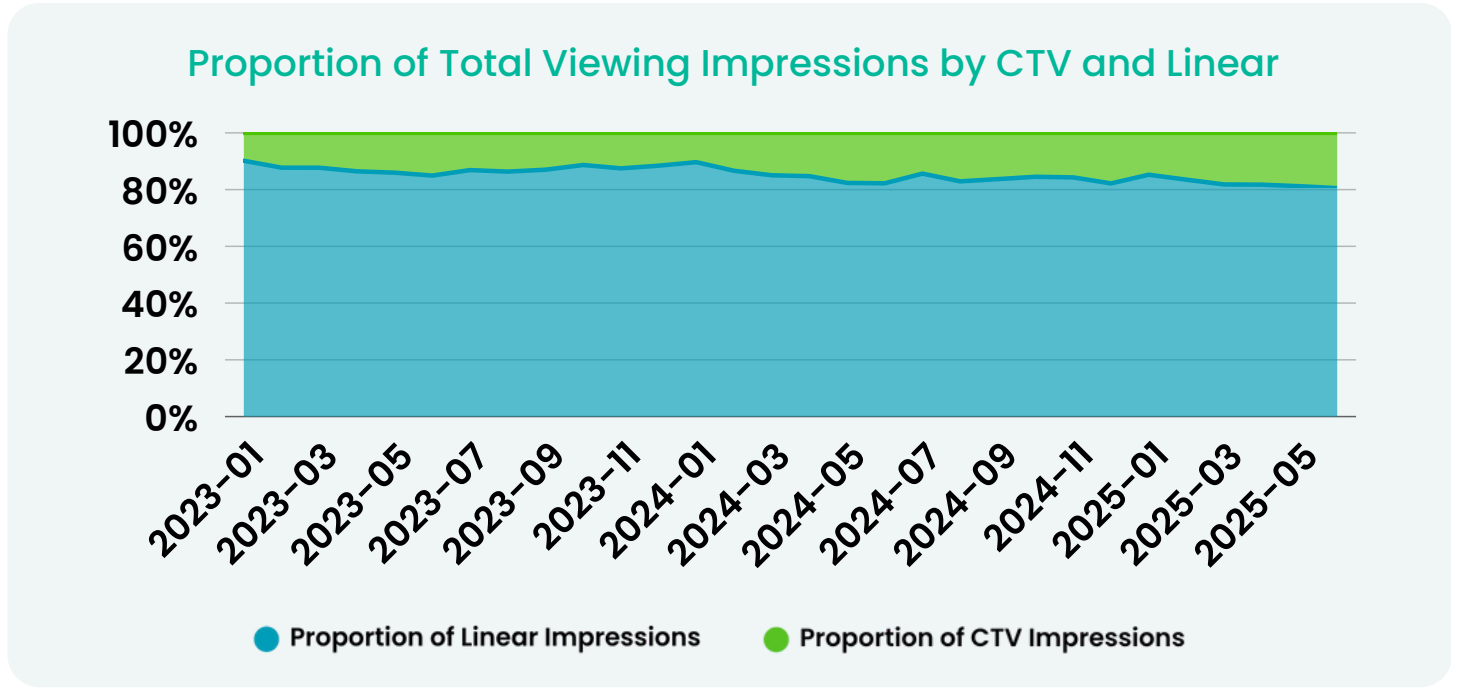


Streaming’s Share Climbs Sharply

CTV impressions surged in H1 2025—rising from 14.76% of total TV ad impressions in January to 19.48% by June, **a 31.91% increase in share**. The momentum behind streaming reflects a broader push to meet audiences where they are, and platforms are responding in kind.

Linear TV remains the primary driver of impressions though, holding 80.52% in June, but the balance is shifting. With CTV-first strategies on the rise and FAST platforms expanding, streaming is becoming less of a complement and more of a core component.

The takeaway? Fragmented viewing calls for a true read on incremental reach and conversions to understand where—and how—ads are making an impact.



Industry	Most Seen Brand on Streaming (Industry Ad Impression SOV in H1 2025)	Most Seen Brand on Linear (Industry Ad Impression SOV in H1 2025)
Auto	<b>HYUNDAI</b> (11.18% SOV)	<b>HYUNDAI</b> (10.74% SOV)
Pharma	<b>Skyrizi</b> (2.36% SOV)	<b>wegovy</b> ® (2.04% SOV)
QSR	<b>McDonald's</b> (9.11% SOV)	<b>BURGER KING</b> (17.20% SOV)
CPG	<b>febreze</b> (2.36% SOV)	<b>febreze</b> (2.20% SOV)

# Retail Creatives That Got Shoppers In-Store

Using ad-level data tied to verified foot traffic, this ranker spotlights retail creative that drove ad viewers to physical stores. The right mix of messaging and placement can drive real-world results, and with always-on outcome measurement, retailers can prove what's most effective.

## Dick's Sporting Goods "Soccer Cleats" 0:30

"Soccer Cleats," featuring Will Arnett, originally aired in 2024, but it delivers such effective lift that it's no surprise Dick's Sporting Goods returned to the same well.



### 581.71% Lift in Foot Traffic

Top Emotion	Curiosity
Brand Recognition	78.00%
Likeability	2.60% above H1 retail norm
Top Program	The Big Bang Theory (7.00% of TV ad impressions)

## Macy's "Mother's Day - Mother Deserves Everything" 0:30

Macy's extended its Alison Brie campaign past December, including a Mother's Day push that hit big-reach programs in a two-week sprint. With foot traffic lift over 200%, it clearly paid off.



### 205.99% Lift in Foot Traffic

Top Emotion	Value
Brand Recognition	95.00%
Likeability	9.00% above H1 retail norm
Top Program	Good Morning America (10.80% of TV ad impressions)

## Kohl's "Make Dad's Day" 0:15

For Father's Day, Kohl's maximized a two-week window with a healthy mix of high-profile programming (NBA Playoffs) and syndicated dramas to achieve high lift.



### 131.01% Lift in Foot Traffic

Top Emotion	Value
Brand Recognition	73.00%
Likeability	11.10% above H1 retail norm
Top Program	NBA (5.89% of TV ad impressions)

# Optimized Ad Placements: A Beauty Retailer's Breakthrough

Whether aiming to boost foot traffic, online activity, or a mix of both, tying ad-level exposure directly to outcomes is key to understanding how video advertising makes a measurable impact. This case study shows how one beauty retailer used iSpot's audience and outcome measurement solutions to link national TV ads to site behavior and optimize campaigns accordingly.

## Challenge

With increasing pressure to justify media spend, the brand sought to connect national TV ad exposure to digital behaviors like site visits and product interest.

## Solution

Using iSpot's verified ad detection and person-level attribution, the brand measured lift in site visits and engagement by comparing ad-exposed viewers to a control group. This analysis provided detailed performance metrics on campaigns—from evergreen branding to culturally-timed tentpoles, including:

Visits per Exposed Household

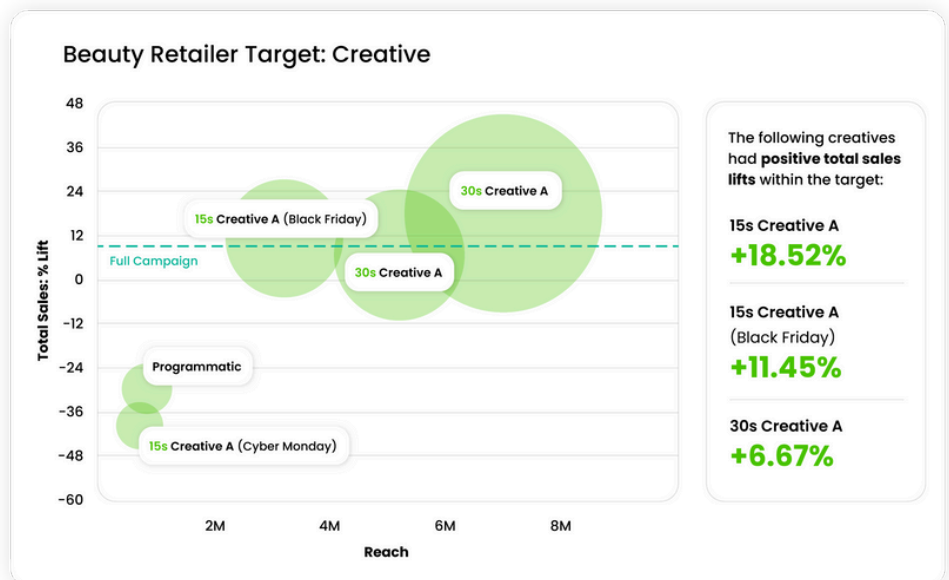
Product Page View Rates

Conversions

Creative & Publisher-Level Performance

## Results

The brand uncovered major performance gaps across creatives and publishers. One creative alone drove a **29% increase in site visits** and a **21% lift in product detail views**. These insights helped redirect investment toward highest-performing creative and optimal media partners. The brand and its agency use this always-on data approach to guide planning and optimize campaigns in real time.



Want deeper insight to how precise attribution unlocked real business impact?

[Read the Full Case Study](#)



# Viewers Loved These Ads Most in H1

Ranked by Likeability vs. brand category norms, these ads stood out for emotional resonance and in some cases, strong Brand Recognition.



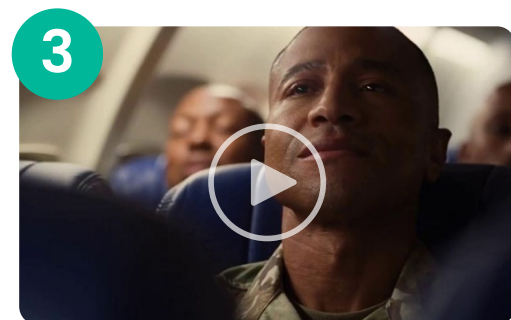
## Pfizer "Knock Out" (1:00)

Likeability	+185 points vs. Norm*
Top Emotion	Inspiring
Brand Recognition	78.00% (9 percentage points above norm)
Fun Fact	Most Likeable Super Bowl LIX Ad



## Hallmark "Mother's Day - Hey Mom" (0:30)

Likeability	+162 points vs. Norm
Top Emotion	Heartfelt
Brand Recognition	91.00% (17 percentage points above norm)
Fun Fact	Aired exclusively across Hallmark networks



## Rocket Mortgage "Own the Dream" (0:30)

Likeability	+161 points vs. Norm
Top Emotion	Heartfelt
Brand Recognition	78.00% (28 percentage points above norm)
Fun Fact	Aired during Super Bowl, NBA Playoffs, March Madness

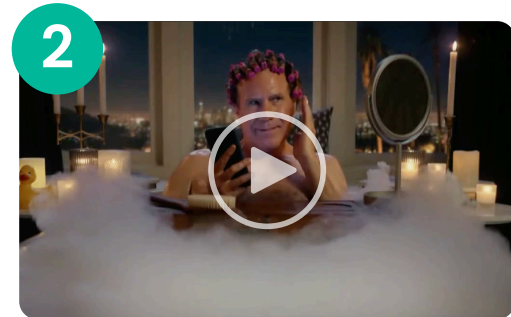
Rank	Brand	Ad Title	Likeability vs. Category Norm
4	Bombas	Buy a Sock, Give a Sock (0:30)	+155 pts
5	Subaru	The Arbor Day Foundation: Kids (0:30)	+154 pts
6	Fidelity Investments	Open Doors: Fishing (0:30)	+154 pts
7	Budweiser	First Delivery (1:38)	+150 pts.
8	Icy Hot	Jeff's Sore Back (0:30)	+145 pts.
9	Acorns	Give Your Spare Change a Second Chance (1:00)	+140 pts.
10	Aflac	Stunt Duck (1:00)	+136 pts.

# HI's Top-Rated Ads by Humor

From aliens to mustaches, these ads scored highest on Funny in the first half of 2025—and in many cases, delivered strong Likeability and Brand Recognition scores as well.



Doritos "Crash the Super Bowl - Abduction" (0:30)	
Funny Score	8.6/10
Likeability	+12% vs. 1H Category Norm
Brand Recognition	93%
Single Best Thing	Visual Scenes



PayPal "Get Ready" (0:30)	
Funny Score	7.9/10
Likeability	+10% vs. 1H Category Norm
Brand Recognition	67%
Single Best Thing	Characters



Gorilla Glue "Bat" (0:15)	
Funny Score	7.3/10
Likeability	+10% vs. 1H Category Norm
Brand Recognition	89%
Single Best Thing	Characters

Rank	Brand	Ad Title	Funny Score
4	Pringles	The Call of the Mustaches (0:30)	7.3/10
5	Jack Link's	Two Flavors, One Bag (0:30)	7.2/10
6	Mountain Dew	Kiss From a Lime (1:20)	7/10
7	Hellmann's   Best Foods	When Sally Met Hellmann's (1:00)	6.8/10
8	Little Caesar's	Whoa (0:30)	6.5/10
9	Taco Bell	Photobomb (0:30)	6.5/10
10	Reese's	Don't Eat Lava (0:30)	6.5/10

# Connecting Creative to Outcomes: An Auto Services Case Study

Emotional impact and likeability are just some of the ways brands evaluate creative impact, but depending on the campaign's objectives, those KPIs can shift. Having measurement that captures the full spectrum of creative performance signals and benchmarks is essential for that very reason.

This approach paid off for an Auto Services Brand, which used iSpot Creative Assessment to identify the top-performing ad—driving a **33% increase in purchase intent** and strong alignment with target audience expectations

## Challenge

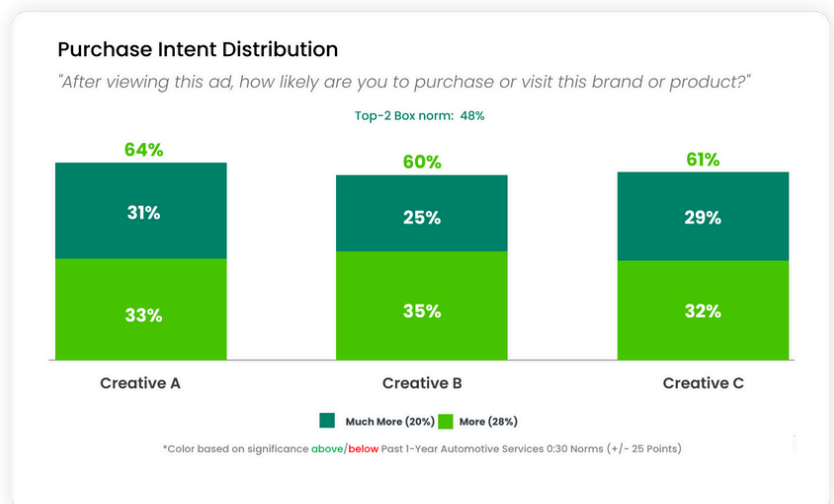
Ahead of a major campaign launch, the brand needed to determine which of three new ads would have the greatest audience impact. Key evaluation areas included purchase intent, emotional response, message clarity, and demographic resonance.

## Solution

Leveraging iSpot Creative Assessment, the brand gained emotional and brand insights within 24 hours. Performance was benchmarked using iSpot's Ace Score and "always-on" comparisons to a year's worth of 30-second automotive service ads.

## Results

One ad stood out, outperforming others by +86 Ace Score points and achieving a **64% purchase intent rate** (vs. 48% category norm). It resonated especially with women, posting a +119 point Ace Score gap-to-norm. Viewers described the creative as attention-grabbing, relatable, and worth rewatching. While all ads exceeded the norm, the brand confidently went to market with the top performer.



**Want a deeper look at how creative testing drove smarter media decisions  
and maximized ROI?**

[Read the Full Case Study](#)



# Top Brands: Streaming Tackles Targeting

Share of TV ad impressions (streaming and linear) vs. all brands, 1H 2025

Rank	Brand	Streaming TV Ad Impressions SOV	Linear TV Ad Impressions SOV	Linear Rank
1	Progressive	0.93%	1.07%	1
2	Allstate	0.85%	0.48%	6
3	Hyundai	0.79%	0.39%	18
4	McDonald's	0.58%	0.46%	9
5	Chick-fil-A	0.58%	0.32%	26
6	Liberty Mutual	0.56%	0.80%	3
7	Walmart	0.52%	0.31%	29
8	Capital One (Credit Card)	0.51%	0.31%	30
9	Nissan	0.48%	0.23%	49
10	Intuit Credit Karma	0.47%	0.33%	23
11	Febreze	0.44%	0.46%	8
12	Toyota	0.43%	0.30%	32
13	Burger King	0.43%	0.91%	2
14	Taco Bell	0.42%	0.19%	100
15	Subway	0.42%	0.43%	14
16	Wendy's	0.42%	0.46%	10
17	The Home Depot	0.41%	0.46%	7
18	Safelite Auto Glass	0.40%	0.44%	13
19	T-Mobile	0.40%	0.40%	17
20	Swiffer	0.39%	0.41%	15

- Local targeting boosts streaming value for QSR brands: McDonald's, Chick-fil-A, and Taco Bell all had higher SOV on streaming than linear, with Taco Bell jumping from No. 100 to No. 14.
- Automaker brands utilized streaming similarly, with Hyundai, Nissan and Toyota beefing up streaming ad impressions SOV to deliver the most relevant creative.
- Intuit Credit Karma used streaming in part to deliver a wider variety of relevant ads depending on the audience, with a higher volume of unique spots on streaming compared to linear.

# Top Networks: Ad Reach Keeps Consolidating

Share of TV ad impressions vs. all national linear networks in all dayparts, 1H 2025

Rank	Network	H1 2025 TV Ad Impressions SOV	Rank Change YoY	Ad Impression Change YoY
1	CBS	8.10%	—	+2.37%
2	Fox News	7.10%	+2	+35.13%
3	ABC	6.36%	-1	+1.85%
4	NBC	5.70%	-1	+5.91%
5	ESPN	4.03%	—	+6.13%
6	ION	2.33%	—	-9.64%
7	HGTV	2.29%	—	-5.26%
8	Univision	2.19%	+1	+0.45%
9	CNN	2.04%	+4	+16.08%
10	Hallmark	2.04%	-2	-9.39%
11	FOX	1.90%	—	+1.27%
12	TBS	1.90%	-2	-11.26%
13	MSNBC	1.75%	-1	-6.49%
14	Food Network	1.73%	+3	+7.32%
15	Telemundo	1.60%	+4	+1.50%
16	TNT	1.58%	+2	-0.81%
17	USA Network	1.58%	-3	-9.43%
18	Game Show	1.37%	+3	+5.46%
19	TV Land	1.36%	-3	-18.53%
20	Investigation Discovery	1.34%	—	-6.82%

- The top five networks by TV ad impressions SOV all saw reach increases year-over-year, as audiences continue to consolidate around premium programming like live sports and news.
- Speaking of news, a busy first half of the year news-wise helped fuel double-digit TV ad impressions growth for both Fox News (up 35.13%) and CNN (up 16.08%).
- Entertainment grew TV ad reach for Spanish-language networks like Univision and Telemundo; Univision saw ad impressions grow by 16% for telenovelas, while reality TV ad impressions jumped by 4x on Telemundo.

# Top Programs: News, Syndication, Sports

Share of TV ad impressions vs. all national linear networks in all dayparts, 1H 2025

Rank	Program	H1 2025 TV Ad Impressions SOV	Rank Change YoY
1	NBA	2.37%	—
2	Men's College Basketball	1.89%	—
3	NFL	1.62%	—
4	Law & Order: SVU	1.22%	—
5	The Big Bang Theory	1.18%	+4
6	SportsCenter	1.01%	+1
7	NCIS	0.90%	-2
8	The Price Is Right	0.81%	—
9	Friends	0.79%	-3
10	Good Morning America	0.77%	—
11	ABC World News Tonight With David Muir	0.72%	+3
12	MLB	0.71%	+4
13	PGA Tour Golf	0.71%	-1
14	Today	0.69%	-2
15	The Five	0.65%	+10
16	FOX and Friends	0.61%	+8
17	The Young and the Restless	0.56%	—
18	Chicago Fire	0.55%	-5
19	America's Newsroom	0.52%	+17
20	Jesse Watters Primetime	0.51%	+26

- Basketball scored in early 2025, with the NBA and men's college hoops as the top two programs, both growing TV ad reach YoY; NBA games rose 9.6%, men's college basketball grew 11.6%.
- The Big Bang Theory grew TV ad reach by over 48% YoY, as the program appeared across significantly more networks (including Nick@Nite).
- A newsworthy first half of 2025 drove increased TV ad reach for related shows across cable and broadcast—with those programs making up five of the top 20 (all up YoY).



# Live Sports Still Deliver Biggest Plays on TV

## NBA Playoffs

**84%**  
More TV Ad Impressions



New York Knicks help deliver 84% more TV ad impressions during this year's conference finals than last.

## Stanley Cup

**78%**  
NBA Audience Overlap



78.1% of Stanley Cup Playoff viewers also watched the NBA Playoffs, showing how brands may optimize spring sports reach and spend.

## March Madness

**16%**  
More TV Ad Impressions



A Final Four full of top teams—all the No. 1 seeds advanced—helped fuel a 15.5% increase in TV ad reach for the men's tournament this year.

## Super Bowl LIX

**85%**  
Of Funny Ads Used Safe Humor



Super Bowl ads generated laughs this year (71% of spots scored for funny), but 85% of those were seen as “safe” humor, continuing a trend away from polarizing spots.

### THE RESEARCH BEHIND SPORTS AD DELIVERY

Sports are a major—but essential—expense for many brands. But program audience averages only tell a portion of the story. Learn more about how to actually measure TV ad viewing and delivery in iSpot's [Every Second Counts](#) report.

# Top Industries: Economy Spurs Ad Shifts

Share of TV ad impressions vs. all of TV, 1H 2025

Rank	Industry	H1 2025 TV Ad Impressions SOV	YoY Impression Change
1	TV Networks	13.68%	-5.44%
2	Quick Serve Restaurants	4.34%	+0.66%
3	Auto & General Insurance	3.38%	+16.16%
4	Automakers	3.00%	-14.78%
5	Wireless Services	2.29%	-6.99%
6	Vitamins & Supplements	2.09%	-6.22%
7	Cleaning Supplies & Fresheners	2.04%	+32.24%
8	Skin & Foot Care	1.87%	-27.85%
9	Streaming Services	1.78%	-11.98%
10	Pet Food	1.63%	+1.77%
11	Department Stores	1.61%	+6.83%
12	Banking & Payments	1.51%	+23.15%
13	Home Improvement	1.36%	+29.40%
14	OTC: Allergies, Cold & Flu	1.30%	+3.53%
15	Home Improvement Retail	1.26%	-13.89%
16	Pizza	1.23%	-14.20%
17	Oral Care	1.20%	-0.28%
18	Casual Dining	1.20%	+1.22%
19	Laundry Detergents & Fabric Softeners	1.18%	-7.95%
20	Legal Services	1.12%	-17.03%

- With money getting tighter for consumers, banking & payment brands got out in front of audiences, increasing overall TV ad impressions by 23%—with even larger climbs on networks like ESPN (up 50%) and Fox News (up 106%).
- Auto & general insurance leaned into tentpole sporting events to grow reach significantly during programming like men’s college basketball (up 25%), the NFL (up 21%) and NBA (up 14%).
- Febreze’s TV ad reach surged 131% YoY, helping fuel the cleaning supplies industry climb; the brand expanded on Big 4 broadcast while also leaning into networks like Fox News and ION.

## Advertisers New to TV in H1 2025

These four brands had no national TV ad impressions in H1 2024 but made a measurable impact in H1 2025. From rapid-response launches to strategic re-entries, each case highlights how new advertisers approached creative, placement, and timing to drive awareness and performance on screen.



Eli Lilly's Zepbound was airing TV ads less than a week after receiving FDA approval for weight management last fall, and hasn't slowed since. The drug has high attention too, at 10% above the norm across all national linear ad placements.

Spruce sprang onto TV in Feb. 2025, with a simple message as an effective and pet-safe weed killer. The P&G brand jumped to No. 3 by gardening & outdoor ad reach in H1 2025, while emphasizing primetime and daytime spots.

**Spruce.**



Shay Mitchell was introduced as the new face of J&J's OGX Beauty in April, and the brand blitzed TV with her image from there. OGX was most present during ABC World News Tonight, but found its largest share of ad reach during drama & action shows (18.7%).

After being absent from TV for years, Brawny returned in May 2025 with a campaign and new Brawny Man. Brawny's new "Birthday" spot sparked curiosity from viewers and scored brand recognition of 83% (9% higher than the household norm in 1H25).

**BRAWNY**

# Glossary

**Household 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.

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

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

**Streaming SOV:** A given brands' portion of their industry's streaming impressions.

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

**View Rates:** The percentage of ad impressions that played to completion without interruptions. In this case on page 4, interruption rates were under 5% meaning over 95% of impressions were viewed in full.

**Creative Assessment Methodology:** Each nationally-breaking TV and video ad is rapidly surveyed by 500+ US consumers (demographically balanced to the census), providing a pure assessment of creative effectiveness. Quantitative and qualitative insights reveal what consumers think and how they feel about an ad.

**Likeability Score:** Measures the extent to which survey respondents like an ad.

**Brand Recognition:** The percentage of viewers who correctly identified the brand or product featured in an ad, based on responses to the question: "What was the brand name of the product or service in this ad?".

**Ace Emo:** The top emotional reactions viewers had to an ad. Only emotions with a statistically significant signal are shown, helping identify what feelings the creative most strongly evoked, e.g. "Funny," "Inspiring," "Annoying," or "Authentic."

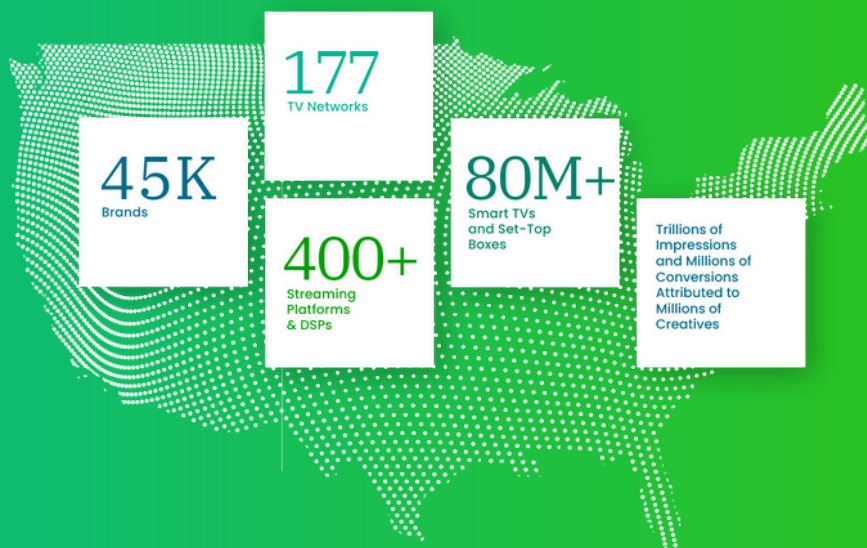
**Single Best Thing:** The ad element that viewers selected as the most impactful or appealing from a predefined list of options including: Characters, Visual Scenes, Music, Brand, Product Itself, Deal or Offer, Message, or None.

**Ace Score Gap-to-Norm:** A metric that compares an ad's Ace Score—a proprietary iSpot index of overall creative performance—to the average score of other ads in the same brand category or industry. A positive gap means the ad outperformed its peers; a negative gap suggests it fell below the norm.

# About iSpot

iSpot helps advertisers drive ad effectiveness with unified TV and video measurement, from creative to audience to outcomes. Our fast, accurate and actionable measurement solutions enable advertisers to assess creative effectiveness, improve media plans and drive business outcomes from TV and streaming advertising. Only iSpot is purpose-built to measure the performance of every ad on TV with digital-like precision and granularity.

Empowered with always-on cross-platform performance insights, advertisers can take quick and confident action to cut wasted ad spend. With currency-grade measurement, large-scale verified insights, and deep competitive intelligence, iSpot gives advertisers control and confidence amid the chaos of the new media landscape.



## Data Footprint

- 45K brands
- 2.2 million creatives
- 177 TV networks
- 210 Media Markets
- 400+ streaming platforms and DSPs
- 82.7 million smart TVs and set-top boxes
- Trillions of impressions & millions conversions attributed to millions of creatives
- 130,000+ video ads with creative assessment data

## Data Quality

- Patented ad 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 750 customers across brands, TV networks and movie studios
- Over 450 employees