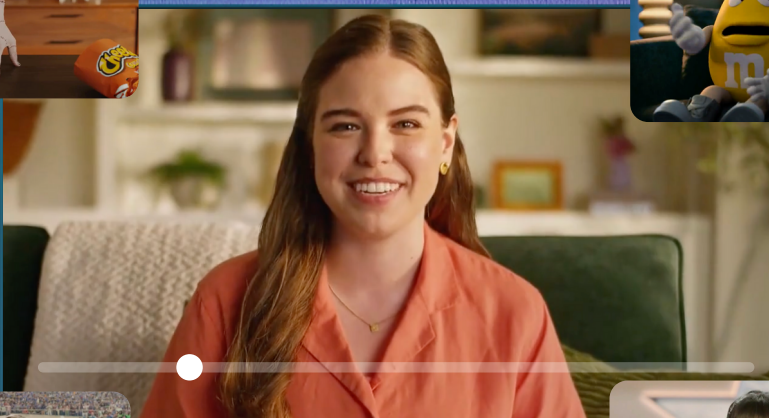




Q3 2025

UNIFIED TV & VIDEO AD SNAPSHOT



Putting a Unified View on TV's Q3

Examining Top Ad Trends for Cross-Platform Transformation

How can the industry rely on legacy video ad measurement when today's TV environment is anything but "legacy?" Streaming and addressable advertising make unified, multi-platform measurement a need-to-have, rather than a nice-to-have. And that fact gets more apparent with each passing quarter showcasing similar takes on the same ad themes.

The footprint for streaming programming and advertising continues to grow, creating more opportunities than ever before for consumers to be exposed to video ads. Yet, TV ad reach is declining (down 2.7% year-over-year), while linear TV ad spend is up 4.2% and ad minutes have climbed 2.4% as well.

Meanwhile, pharma advertising—responsible for 13% of est. national linear TV spend—is under the microscope and late-night TV is undergoing fundamental (and permanent) shifts. Football, of course, somehow manages to grow its TV ad reach all the same despite an environment seemingly built for the opposite.

But traditional viewership is consolidating around long-time winning formulas: There's never enough football, live news keeps scoring ad impressions, and advertisers targeting short-term outcomes are still finding success growing reach with popular syndicated shows.

Want more? This report offers a snapshot of the key TV trends of Q3, using an ad-first approach to showcase the narratives guiding creative, audience and outcomes success.

The Importance of Unified Video Ad Measurement

iSpot provides real-time insights around creative, audience and outcomes, wherever they appear across both linear & streaming TV.

[Contact iSpot](#)



Q3 Market Snapshot & Key Metrics

1.67T

Q3 Household TV
Ad Impressions

(-2.7% YoY)

5.3M

Q3 National Linear
TV Ad Minutes

(+2.4% YoY)

\$8.77B

Q3 Est. National
Linear TV Ad Spend

(+4.2% YoY)

12.2M

Q3 National
Linear TV Airings

(-1.0% YoY)

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What's Reshaping TV Advertising

Four forces are redefining where ad dollars flow, how reach is measured and which content commands premium pricing.

Unification: Need-to-Have

Linear TV ad reach held steady YoY, but streaming is still growing the opportunities for brands to get in front of consumers. To balance broad reach via linear, and the otherwise untapped audience within streaming environments, brands need unified measurement to understand overlap, optimize spend and convert ad viewers into customers.



Pharma In the Crosshairs

Pharma brands account for over 13% of Q3 est. national linear TV ad spend. With FDA regulations tightening, networks face a critical question: who could replace pharma ad dollars (especially during news programming)? The answer will reshape inventory strategy and pricing.

Late Night Wars

Stephen Colbert's cancellation and Jimmy Kimmel's short-term suspension exposed late-night's fragility. Yet, these shows still ranked in the top 10 for ad reach on their respective networks. For advertisers banking on appointment viewing and premium demos, late-night remains a rare, if uncertain, bet.



TV's Football Focus (Again)

NFL games delivered 25% of Big 4 ad reach last season—and 28% so far this season. Simply put, football's stranglehold around audiences continues tightening. For brands willing to pay the premium, outcomes will follow.

Two Paths to Intent: Purpose vs. Utility

Q3's top Purchase Intent-driving ads show that big gains come from more than pure entertainment. Within the rankings, two reliable paths emerged: storytelling that differentiates a brand through purpose, or tightly focused creative that breaks through with humor or utility in highly functional categories.

Chime and Bombas creatives built narratives around convenience and purpose. Their success signals that brands aiming for higher intent should consider investing in longer formats that can deliver a value-driven message tying together both rational benefits and emotional resonance.

By contrast, OTC brands—which captured three of the top five spots—leaned into product-heavy messaging. Tums and Mucinex went the comedic route to make their products both relatable and memorable, while Vicks VapoFreeze relied on a straightforward, utility-driven message.

Top Five Ads by Top-2-Box Purchase Intent Lift

Ranked based on gap-to-industry norm for each brand. Click ad titles or thumbnails to watch.

"College Move" 0:15



70% Intent (+31*)

Top Emo

Authentic

Brand Recognition

43% (-16*)

"Way More Comfort – Socks" 0:30



68% Intent (+22)

Top Emo

Philanthropy

Brand Recognition

80% (+20)

"Nadine" 0:30



62% Intent (+21)

Top Emo

Convenient

Brand Recognition

90% (+28)

"Take a Vacation From Your Cough" 0:30



60% Intent (+21)

Top Emo

Funny

Brand Recognition

83% (+24)

"Bravo Network: Heartbreak" 0:30



60% Intent (+21)

Top Emo

Funny

Brand Recognition

77% (+18)



Purpose or utility.
Emotion or function.
High-performing ads
pick one path and
execute it relentlessly.

Familiar, Fast Humor Won Q3

Q3's funniest ads reveal a pattern: Humor works best when anchored in familiar characters or tied to instant product gratification. Three of the five leaders came from snack brands, proving how quick-hit comedy paired with cravings can drive memorability in impulse-driven categories.

Short-form dominated, with three 15-second spots leading the way. The advantage? Getting to the punchline faster means less risk of losing viewers before the payoff lands. Recognizable characters like Liberty Mutual's LiMu Emu and M&M's Spokescandies kept humor fresh while reinforcing brand equity. Jersey Mike's took a different route: pairing economic uncertainty with exaggerated humor and clear savings messaging that speaks directly to budget-conscious consumers.

Collectively, these ads highlight humor's versatility: It can grab attention quickly, sustain recognition through characters, or connect value to everyday decisions—making it one of the most effective creative levers of the quarter.

Top Five Spots by Funny Score in Q3 2025

Click ad titles or thumbnails to watch full spot.

"Thing!" 0:15



1

7.2 Funny Score

Purchase Intent*	60% (-2)
Brand Recognition*	83% (+2)

"LiMu Emu & Doug: Streaker" 0:30



2

7.0 Funny Score

Purchase Intent	36% (-1)
Brand Recognition	94% (+12)

"The Boyfriend" 0:15



3

6.9 Funny Score

Purchase Intent	42% (-16)
Brand Recognition	84% (+21)

"New Spokesperson" 0:30



4

6.4 Funny Score

Purchase Intent	66% (-1)
Brand Recognition	79% (-2)

"Halloween: Scary Movie" 0:15



5

6.4 Funny Score

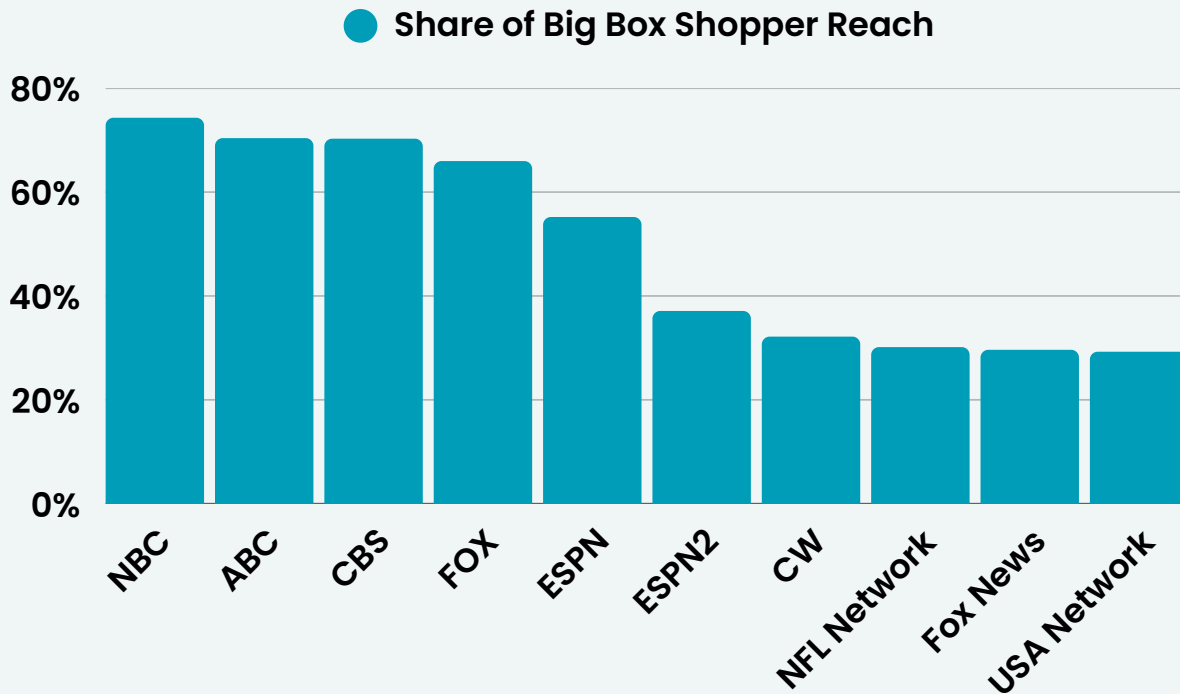
Purchase Intent	68% (+5)
Brand Recognition	89% (+14)

💡

Familiar characters. Fast punchlines. Q3's funniest ads didn't waste a second.

Big Box Retailers Bank on Sports, Broadcast

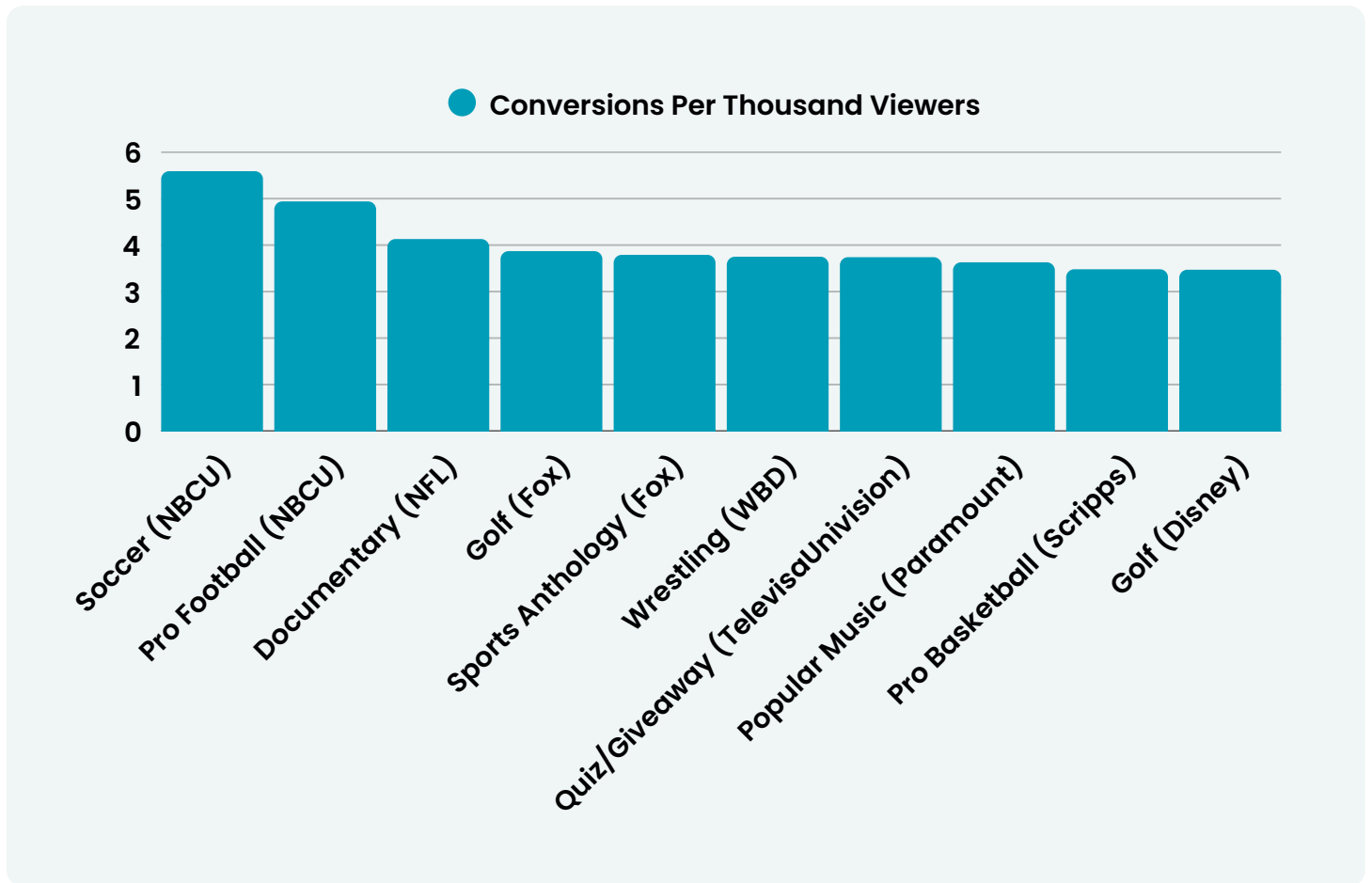
Linear TV networks ranked by share of big box retail visitors reached, Sept. 2025.



- Networks with NFL rights were big winners in September 2025—especially for big box retailers. NBC, ABC, CBS, Fox and ESPN all topped 55% for big box reach during the month, significantly outpacing other networks.
- While those networks are not exclusively dedicated to the NFL, those games also have the highest ad reach of programming that appeared in September.
- Along the same line of thinking, NFL Network reached over 30% of big box visitors, largely on NFL highlights.
- Though broadcast networks and ESPN inventory are bound to be pricier inventory for advertisers, understanding data like this—highlighting targeted reach—shows how the networks are worth the increased cost for big box retailers and other industries with similarly high audience overlap.

B2B Brands Betting on Soccer Matches

Program genres & media companies ranked by 30-day online lift conversions per thousand viewers.



- Soccer matches on NBCU properties—primarily Premier League—converted web outcomes for B2B brands at a higher rate than other programming in Q3, despite soccer’s limited ad breaks.
- In general, sports were a popular place for B2B conversions, with eight of the top 10 programs by conversions being categorized as sports.
- Pro basketball games on Scripps properties speaks to the power of women’s sports as well for the B2B space; WNBA games hit 3.5 conversions per 1,000 viewers for Scripps’ B2B advertisers throughout the quarter.
- B2B advertisers can find value in non-sports programming as well, however, soccer continues to gain more momentum in the U.S.—Q3 data shows Paramount Global popular music programming near four conversions per 1,000 viewers, as did quiz & giveaway programming on TelevisaUnivision (which also showcases the value of Spanish-language inventory across industries).

Streaming Brands: A Tale of More Targeting

Share of TV ad impressions (streaming) vs. all brands, Q3 2025.

Rank	Brand	Q3 Streaming Ad Impressions SOV	Linear Rank
1	Allstate	0.85%	11
2	Progressive	0.80%	1
3	Hyundai	0.77%	79
4	GEICO	0.66%	14
5	Liberty Mutual	0.58%	4
6	Chick-fil-A	0.54%	58
7	Walmart	0.53%	19
8	Wendy's	0.51%	5
9	Amazon Prime	0.50%	35
10	Febreze	0.49%	6
11	Downy	0.49%	7
12	Target	0.49%	25
13	McDonald's	0.49%	28
14	Safelite Auto Glass	0.47%	11
15	Tide	0.45%	46
16	Olive Garden	0.44%	17
17	Nissan	0.44%	155
18	Swiffer	0.42%	9
19	Verizon	0.42%	21
20	Taco Bell	0.41%	92

- The biggest streaming advertisers are not the same as top linear brands—a testament to the different ways advertisers leverage streaming's targeting capabilities vs. linear's broad reach.
- Industries with an emphasis on local customers, like QSR and automotive brands, make for some of the biggest differences between streaming and linear, with Nissan and Taco Bell showing some of the biggest gulfs between rankings.
- Also notable: Year-over-year streaming ad impression SOV is climbing fast among TV's top spenders, signaling a strategic shift.

Streaming's Precision Reshapes Ad Strategies

Share of (streaming) TV ad impressions vs. all of TV, Q3 2025.

Rank	Industry	Q3 Streaming Ad SOV	Q3 Linear Ad Reach Rank	Top Streaming Brand
1	Quick Serve Restaurants	6.05%	2	Chick-fil-A
2	Automakers	5.60%	3	Hyundai
3	Auto & General Insurance	4.77%	1	Allstate
4	Cleaning Supplies/Fresheners	2.93%	5	Febreze
5	Department Stores	2.41%	7	Walmart
6	Banking & Payments	2.39%	29	JPMorgan Chase
7	Wireless Services	2.38%	4	Verizon
8	Detergent/Fabric Softeners	1.89%	12	Downy
9	Rx: Psoriasis, Shingles, Skin & Nails	1.68%	18	SKYRIZI
10	Pet Food	1.67%	8	Blue Buffalo
11	Beer & Hard Seltzer	1.66%	6	Modelo
12	Vitamins & Supplements	1.65%	13	Nutrafol
13	Home Improvement Retail	1.56%	32	The Home Depot
14	Casual Dining	1.55%	22	Buffalo Wild Wings
15	Theatrical Movies	1.42%	15	Warner Bros.
16	Online Retail	1.40%	37	Amazon Prime
17	Pizza	1.36%	21	Domino's
18	Skin & Foot Care	1.34%	10	Olay (Skin Care)
19	Housing & Home Improvement	1.25%	47	LeafFilter
20	Credit Cards	1.22%	11	Capital One

- Banking & payment brands were one of several industries that ranked significantly higher on streaming impressions than linear, as advertisers lean toward more targeted messaging and creative approaches on TV.
- Retail leaned into streaming's shoppable capabilities: department stores, online retail and home improvement stores all ranked higher for streaming ad reach compared to linear.
- QSR, casual dining and automotive brands are leveraging streaming's geo-targeting at scale, using local ad buys to drive foot traffic and dealership visits.

Football Fuels Ad Reach on Linear

Share of TV ad impressions vs. all national linear networks in all dayparts, Q3 2025.

Rank	Network	Q3 TV Ad Impressions SOV	Rank Change YoY	Top Advertiser
1	CBS	7.04%	+1	Progressive
2	Fox News	6.86%	+1	LeafFilter
3	ABC	6.38%	+1	Target
4	NBC	6.19%	-3	Progressive
5	ESPN	3.67%	—	Wendy's
6	ION	2.41%	—	Domino's
7	FOX	2.35%	+2	Progressive
8	Univision	2.34%	+4	Walmart
9	HGTV	2.27%	-2	Lowe's
10	Hallmark	2.08%	-2	Blue Buffalo
11	CNN	1.95%	-1	Samsung Mobile
12	TBS	1.81%	+2	Progressive
13	MSNBC	1.75%	-2	Bausch + Lomb Blink
14	USA Network	1.75%	-1	Burger King
15	Game Show	1.70%	+5	Kohl's
16	Food Network	1.69%	-1	Kohl's
17	Telemundo	1.59%	-1	Domino's
18	TV Land	1.46%	-1	Burger King
19	BET	1.39%	-1	Burger King
20	Investigation Discovery	1.33%	-1	Intuit Credit Karma

- Without the Olympics, football still fueled ad reach across the Big 4 networks and ESPN; NFL and college games made up 19.2% of impressions across ABC, CBS, ESPN, Fox and NBC in Q3.
- News-related programming also loomed large: Fox News jumped to No. 2 by ad reach, while ABC, CBS and NBC all leaned on news programming when live sports weren't on.
- Univision grew TV ad impressions 10% YoY by doubling down on entertainment programming, which accounted for nearly 70% of its Q3 TV ad reach.

Top Programs: News Surges in Summer

Share of TV ad impressions vs. all national linear networks in all dayparts, Q3 2025.

Rank	Program	Q3 TV Ad Impressions SOV	Rank Change YoY	Top Ad Industry
1	NFL	3.00%	—	Insurance
2	College Football	2.86%	—	QSR
3	MLB	1.28%	+1	Automakers
4	Law & Order: SVU	1.22%	+5	QSR
5	The Big Bang Theory	1.22%	+8	QSR
6	NCIS	1.13%	+2	QSR
7	SportsCenter	1.08%	—	QSR
8	Friends	0.83%	-2	QSR
9	Good Morning America	0.82%	+1	Department Stores
10	ABC World News Tonight	0.74%	+4	Vitamins & Supplements
11	Today	0.71%	+1	Pet Food
12	The Price Is Right	0.63%	-1	Cleaning Supplies
13	The Five	0.61%	+3	Vitamins & Supplements
14	The Young & The Restless	0.61%	+3	Cleaning Supplies
15	CBS Mornings	0.60%	+13	Pet Food
16	Fox & Friends	0.57%	-1	Vitamins & Supplements
17	NBC Nightly News	0.52%	+1	Insurance
18	Family Feud	0.51%	+3	Insurance
19	Today 3 rd Hour	0.51%	+4	Skin & Foot Care
20	Jesse Watters Primetime	0.50%	+14	Vitamins & Supplements

- NFL and college football remained No. 1 and No. 2 by TV ad reach while growing impressions YoY—the NFL climbed 12.2% YoY, while college football was up 16.4%.
- Syndication scored in Q3. Four of the top eight programs were reruns in heavy rotation; something QSR brands were well aware of as the top industry during all of those shows.
- Nearly half of the top 20 programs were news-related (including morning shows), with most increasing ad impression rankings and ad minutes YoY.

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.

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?".

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.

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."

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.

Conversion Rate: The percentage of viewers who took a specific, desired action after watching a video ad.

Targeted Reach: The number of unique individuals within a specific audience who are exposed to a video ad.

Top-2-Box Intent: The percent of survey respondents that reported an increased desire to purchase or visit a given brand or product after watching an ad. Also referred to as positive purchase/visit intent.

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

- 68K brands
- 2.7 million creatives
- 183 TV networks
- 207 Media Markets
- 500+ streaming platforms and DSPs
- 82.7 million smart TVs and set-top boxes
- Trillions of impressions & millions conversions attributed to millions of creatives
- 160,000+ 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, agencies and publishers
- Over 450 employees