

iSpot.tv

H1 2024

TV TRANSPARENCY REPORT

Insights to Shape Future Ad Strategies



TV Reach Dipped, But Primetime Power Grew

The industry continues to witness TV’s transformation in real time, as data from the first half of 2024 reveals a landscape experiencing some major shifts. Top-line takeaways include:

Reach Decrease

Household TV ad impressions decreased by 3.73% during the first half of 2024, as most dayparts saw ad reach decline.



Primetime Pours It On

Despite reach decrease, primetime now accounts for more than 26% of all national linear TV ad impressions, and is growing (primetime impressions were up 2.62% YoY).

Streaming vs. Linear Mix

The top five insurance brands captured more of the industry’s impressions SOV on streaming (80.44%) than linear (76.51%) TV, as they use streaming to expand ad reach.

Barking Up the Right Tree

Pet food, skin & foot care and snack food were big YoY movers, all showing significant increase in reach while others shifted strategies with new spots and different programs.

Skating to Success

Speaking of sports, an exciting playoff and the Stanley Cup on ABC helped the NHL deliver 49% more TV ad impressions YoY (cementing hockey as a top-20 program by ad reach).

And that’s just scratching the surface. iSpot’s latest transparency report dives into those TV ad trends and more from a memorable first half of 2024.

4.23T

H1 Household TV Ad Impressions

\$22.2B

H1 Est. National Linear TV Ad Spend

261.9B

H1 Primetime Big 4 TV Ad Impressions

\$3.97B

H1 Primetime Big 4 Est. TV Ad Spend

Sports Remained a Slam Dunk on TV

NBA



The NBA was the No. 1 program by TV ad reach during the first half of 2024, accounting for 2.06% of ad impressions, while also scoring ad attention 12% above the norm.

NHL



A competitive playoff and thrilling Stanley Cup Final on ABC helped fuel hockey's 49% ad impressions rise YoY, with the Cup up 199% YoY despite a Canadian team (the Edmonton Oilers) playing.

March Madness



Thanks in part to the Caitlin Clark effect, the NCAA Womens' Basketball Tournament more than doubled TV ad impressions YoY, managing to grow reach as the event continued — even as the number of games shrunk.

Super Bowl LVIII



This year, iSpot first reported a record 126.6 million average second-by-second audience during the Super Bowl, reaching nearly 51 million U.S. households across streaming and linear networks.

DID YOU KNOW?

With sports' importance to TV growing, spot-level TV ad measurement has never been more crucial. Read all about the importance of TV ad precision in [Every Second Counts](#), from iSpot.

Standout Sports Talent

While former/current athletes and coaches remain a hot commodity for ads, impressions featuring those individuals were down 40.2% YoY in HI 2024.

Top Brands that Featured Athletes and/or Coaches in HI

Brands are ranked on TV ad impression counts for ads that featured athletes and/or coaches.



Year-over-year, many of the top sports spokesmen are relatively static, but beyond Serena Williams, spokeswomen were a more dynamic group featuring rising players like Cameron Brink (basketball) and Coco Gauff (tennis.) In anticipation of the Summer Olympics, Simone Biles made a big return to the big screen, breaking into the top 5 sports spokeswomen list for the first time since 2022.

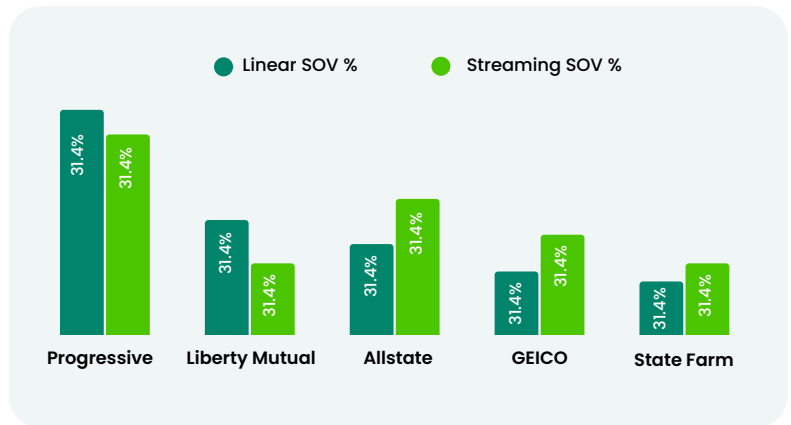
Top Men 2024	Top Men 2023	Top Women 2024	Top Women 2023
Shaquille O'Neal	Stephen Curry	Serena Williams	Serena Williams
Stephen Curry	Shaquille O'Neal	Simone Biles	Sloane Stephens
Tony Hawk	Peyton Manning	Jessica Hawkins	Rose Lavelle
Charles Barkley	Charles Barkley	Cameron Brink	Candace Parker
Peyton Manning	Rob Gronkowski	Coco Gauff	Dawn Staley

Streaming vs. Linear Insights: Insurance, Automakers, QSR Trends

By analyzing how a brand’s share of voice stacks up against the competition across linear and streaming, marketers can make data-driven decisions around spend allocation, media mix strategy and white space opportunities. Examining the top players among key industries in HI 2024, variations in linear and streaming SOV highlight the complexity advertisers face in reaching target audiences and outmaneuvering the competition.

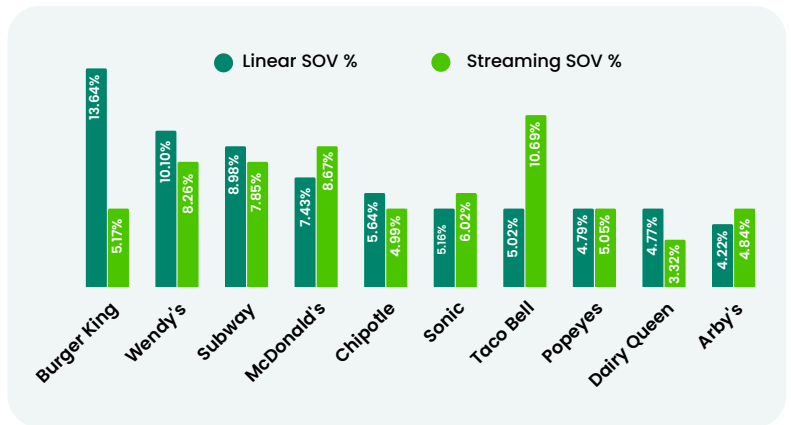
Insurance

Progressive led the pack across both linear and streaming impressions SOV for insurance brands in HI. Liberty Mutual focused more on linear, whereas Allstate, GEICO and State Farm saw more SOV on streaming.



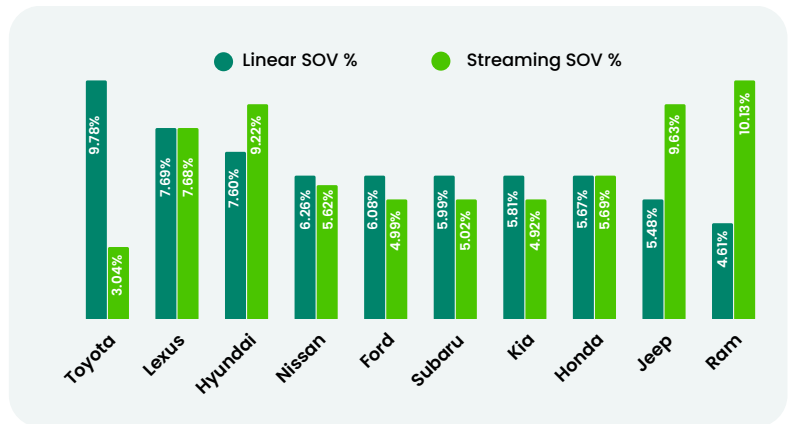
QSR

Among top QSR brands, Taco Bell ranked first in streaming SOV with 10.69% of all QSR impressions but only seventh in linear, highlighting the brand’s strong digital presence. Conversely, Burger King dominated in linear SOV (13.64%), while other brands maintained relatively balanced media weight across both linear and streaming platforms.



Automakers

In HI 2024, FCA brands Jeep and Ram Trucks demonstrated strong streaming SOV, outpacing other top automakers. Lexus maintained a steady presence across both linear and streaming platforms, while Toyota led in linear SOV (9.78%), driven in part by its significant investment in sports programming.



Digging Into Dayparts

Daytime ad impressions were down YoY on national linear TV, and the same went for network promo impressions. Yet daytime was one place where promos seemed to pick up some steam – potentially indicating a shift in network strategy (and/or fewer brands buying during the daypart).

Friends with Benefits



TV network promo airings increased by 74% YoY during Friends reruns in daytime, while 19% more network promo airings appeared across Law & Order: SVU during daytime.

Promos Found Daytime



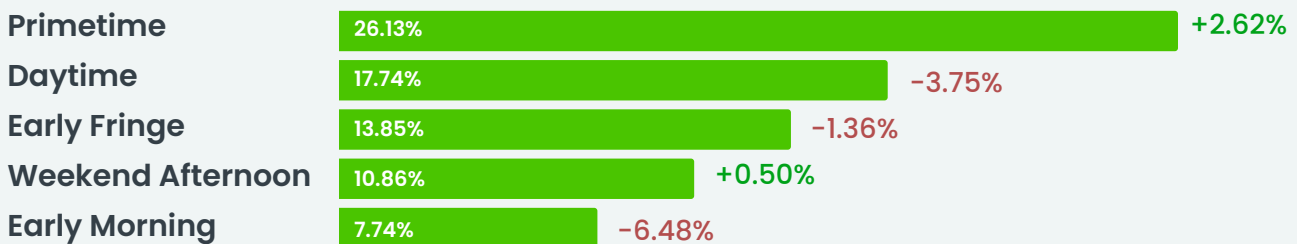
Across national linear TV, network promo airings were up 0.81% YoY in daytime, but promo ad minutes actually rose 2.84% YoY during the daypart.

Promo Pros



Major networks like Fox (44% more promo minutes), TBS (+35%), Fox News (+43% minutes) and CNN (+25 minutes) all showed significant increases in daytime promo loads as well.

Top Dayparts in HI 2024 by Impressions SOV



Percentage increase compares year-over-year

- As linear TV gets more squarely attached to sports and other premium programming, it's fueling an uptick in primetime TV ad impressions, with the daypart accounting for over a quarter of all impressions in HI 24.
- Sports paces weekend afternoons as well, with NFL, NBA, NHL and MLB action (among others) all contributing to a modest impressions rise for that daypart.
- Notably, daytime and early morning appear to be dropping in terms of ad reach as fewer consumers are working from home.

Brands Dialed in Purchase Intent

Industry-specific purchase intent benchmarks are valuable for measuring how much an ad can motivate audiences to consider or buy a product or service – regardless of how long or short that potential purchase window may be. Below, we examine the top-performing ads of 2024 (in H1) by positive (top-2 box) purchase intent for three different industries.

Soft Drinks (Short-Term) H1 '24 Positive Purchase Intent Norm: 59%



Refresh Your Senses
69% Positive Purchase Intent
+8% Likeability Score

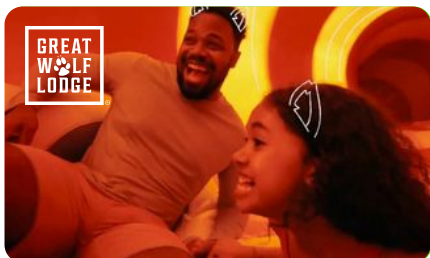


Not a Dirty Word
69% Positive Purchase Intent
+14% Information Score



Skatelite Crisis
65% Positive Purchase Intent
+12% Likeability Score

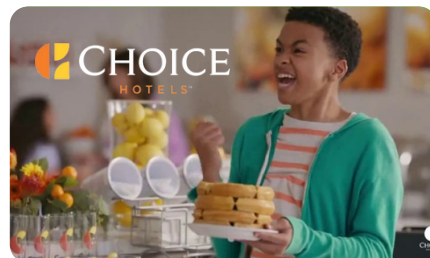
Hotels (Mid-Term) H1 '24 Positive Purchase Intent Norm: 51%



Bring Your Pack Together
65% Positive Purchase Intent
+10% Likeability Score



Competing With Each Other
64% Positive Purchase Intent
+4% Attention Score

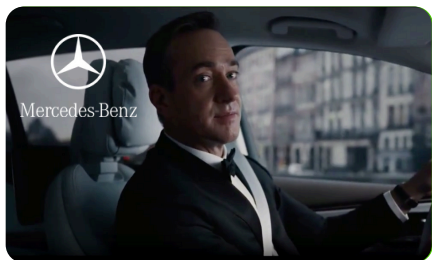


A Stay For Any You
60% Positive Purchase Intent
+3% Watchability Score

Autos (Long-Term) H1 '24 Positive Purchase Intent Norm: 45%



Open My Eyes
65% Positive Purchase Intent
+17% Likeability Score



Defining Class Since 1886
64% Positive Purchase Intent
+11% Watchability Score



First Impression
61% Positive Purchase Intent
+4% Attention Score

Top 20 Networks

H1 2024 TV TRANSPARENCY REPORT

Rank	Network	H1 2024 TV Ad Impressions SOV	Rank Change YoY	Top Brand Advertiser
1	CBS	8.03%	—	Progressive
2	ABC	7.07%	—	Verizon
3	NBC	5.38%	—	Progressive
4	Fox News	4.45%	—	Balance of Nature
5	ESPN	2.95%	+1	Lexus
6	ION	2.63%	-1	Domino's
7	HGTV	2.28%	—	Kohl's
8	Univision	2.14%	+1	Cicatricure
9	MSNBC	2.03%	+4	Ro
10	Hallmark	2.02%	+4	No7 Laboratories
11	CNN	1.98%	-1	Maune Raichle Hartley French & Mudd, LLC
12	TBS	1.95%	+3	Progressive
13	FOX	1.82%	-1	Progressive
14	Food Network	1.69%	-3	Boar's Head
15	USA Network	1.67%	+1	Verizon
16	TNT	1.53%	-8	Progressive
17	TV LAND	1.52%	+3	Burger King
18	Telemundo	1.51%	+4	Wendy's
19	BRAVO	1.46%	—	Verizon
20	Investigation Discovery	1.44%	-3	Domino's

- MSNBC was one of two YoY newcomers in the top 10, with TV ad impressions up 2.4% vs. H1 2023, thanks to reach increases for top programs like Morning Joe, Deadline: White House, and The Beat With Ari Melber.
- Hallmark was also a new addition to the top 10, with TV ad impressions up 2.0% YoY, partly on the strength of Drop Dead Diva re-airst (a new addition to the network's programming).
- Telemundo's overall TV ad impressions climbed by nearly 13% YoY as the network's primetime reach grew by almost 16%.

Top 20 Programs

Rank	Program	HI 2024 TV Ad Impressions SOV	Rank Change YoY	Attention Index
1	NBA	2.06%	—	112
2	Men's College Basketball	1.54%	+2	96
3	NFL	1.52%	-1	127
4	Law & Order: SVU	1.23%	-1	101
5	NCIS	0.93%	+1	106
6	Good Morning America	0.89%	+1	112
7	Friends	0.88%	-2	86
8	The Price Is Right	0.79%	+2	119
9	The Big Bang Theory	0.74%	+26	75
10	SportsCenter	0.71%	-2	98
11	ABC World News Tonight With David Muir	0.69%	+1	112
12	Today	0.67%	-3	76
13	Chicago Fire	0.66%	-2	88
14	Blue Bloods	0.60%	-1	81
15	The Young and the Restless	0.55%	+2	114
16	MLB	0.51%	+18	96
17	The View	0.51%	+3	83
18	House Hunters	0.50%	+14	114
19	Chicago P.D.	0.50%	-4	85
20	NHL	0.47%	+28	104

- WBD identified shows with significant ad reach and leaned in, as syndicated episodes of The Big Bang Theory jumped 26 spots YoY and House Hunters rose 14 places (on strong attention too).
- An exciting hockey season and playoffs – plus the Stanley Cup on ABC – helped the NHL grow its TV footprint substantially YoY, with 49% more ad impressions.
- The Young and the Restless continued to succeed for CBS, moving up two spots to No. 15 by TV ad reach, while sitting at No. 2 during daytime programming.

Top 20 Brand Advertisers

H1 2024 TV TRANSPARENCY REPORT

Rank	Brand	H1 2024 TV Ad Impressions SOV	Rank Change YoY	Industry
1	Progressive	1.07%	—	Auto & General Insurance
2	Domino's	0.80%	—	Pizza
3	Burger King	0.69%	+2	Quick Serve Restaurants
4	Verizon	0.56%	—	Wireless Services
5	Liberty Mutual	0.55%	-2	Auto & General Insurance
6	Consumer Cellular	0.54%	+13	Wireless Services
7	Wendy's	0.50%	+2	Quick Serve Restaurants
8	Subway	0.45%	-1	Quick Serve Restaurants
9	TurboTax	0.45%	+5	Tax Filing Services
10	Allstate	0.43%	+30	Auto & General Insurance
11	Toyota	0.41%	+1	Automakers
12	Downy	0.41%	-6	Laundry
13	Olay	0.39%	+75	Skin & Foot Care
14	Safelite Auto Glass	0.39%	+31	Auto Parts & Repair
15	The Farmer's Dog	0.38%	+67	Pet Food
16	Kohl's	0.38%	+4	Department Stores
17	Tide	0.37%	-2	Laundry
18	McDonald's	0.37%	-8	Quick Serve Restaurants
19	The Home Depot	0.36%	+10	Home Improvement
20	Lowe's	0.35%	+7	Home Improvement

- Consumer Cellular's TV ad reach rose (up 48% YoY) in conjunction with customer concerns around price, which are addressed prominently in messaging for its most-seen 2024 ad spots.
- Safelite's messaging hasn't changed much, but the brand shifted its daypart focus in 2024, leading to a 67% increase in TV ad impressions during primetime (part of a 42% climb overall).
- The Farmer's Dog scored Super Bowl love again, pivoting to more "Big 4" broadcast ad reach YoY; ABC, CBS, Fox, and NBC accounted for 2.4 billion H1 24 impressions vs. 619 million in H1 23.

Top 20 Industries

HI 2024 TV TRANSPARENCY REPORT

Rank	Industry	HI 2024 TV Ad Impressions SOV	HI '23 SOV	Top Advertiser
1	TV Networks	13.45%	14.01%	CBS
2	QSR	4.17%	4.33%	Burger King
3	Automakers	3.58%	3.92%	Toyota
4	Auto & General Insurance	2.87%	2.85%	Progressive
5	Skin & Foot Care	2.54%	1.91%	Olay
6	Wireless Services	2.41%	2.16%	Verizon
7	Vitamins & Supplements	2.13%	1.87%	Balance of Nature
8	Streaming Services	2.09%	2.26%	Paramount+
9	Pet Food	1.58%	1.18%	The Farmer's Dog
10	Cleaning Supplies	1.57%	1.39%	Swiffer
11	Department Stores	1.51%	1.54%	Kohl's
12	Pizza	1.35%	1.47%	Domino's
13	Laundry	1.29%	1.42%	Downy
14	Candy & Gum	1.25%	1.32%	Reese's
15	Snack Foods	1.23%	1.09%	Cheez-Its
16	OTC: Allergies, Cold & Flu	1.22%	1.39%	Vicks
17	Online Retail	1.19%	1.23%	Amazon Prime
18	Banking & Payments	1.17%	1.03%	Chime
19	Oral Care	1.15%	1.11%	Sensodyne
20	Rx: Psoriasis, Shingles, Skin & Nails	1.15%	1.05%	Dupixent (Eczema)

- Streaming and TV promos dropped YoY from 16.27% in HI 23 to 15.54%, while theatrical movie ad impressions fell, suggesting studios are optimizing brand revenue from TV ad inventory.
- Cheez-It was snack brands' big winner in HI 24, growing TV ad reach by 16% YoY, and 28% during primetime programming (like the College Football Playoff).
- Skin & foot care TV ad impressions skyrocketed partly due to a surge from Olay, which grew reach 89% YoY while leaning into "Medifacts" PSA-style ads (and Big 4 broadcast programming).

Conclusion

Continued transparency around TV advertising is how the industry properly assesses where change is needed, while shining a spotlight on the advertisers and networks that are ahead of the curve.

For all of the expected TV outcomes during the first half of 2024, there were many surprises – and lessons to learn from, especially with a second half of the year brimming with major events like the Summer Olympics. As linear TV advertising continues to consolidate its focus around premium programming, understanding how that impacts attention and audience delivery becomes even more crucial.

This report is just a sampling of the depth of TV advertising insights at your fingertips when partnering with iSpot. Want to go deeper on the creative, audience and outcome trends that are most pressing for your decision-making?

**Streamline Your TV Ad
Effectiveness**

[Contact iSpot](#)



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.

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.

Positive Purchase Intent: The percent of survey respondents that reported an increased desire to purchase or visit a given brand or product after watching an ad.

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

Information Score: Measures the extent to which survey respondents found an ad informative.

Attention Score: Measures the extent to which an ad grabs survey respondents' attention.

Watchability Score: Assesses the likelihood of future viewing of the commercial.

About iSpot.tv

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