

An iSpot Insights Report

The Voice Wars

Voice Activated Devices Advertising on TV

(Jan. 1, 2018 – Dec. 11, 2018)



iSpot.tv

2018 Highlights

5

Brands

Ran **132 ads, 27,478 times** so far in 2018

\$397M

Est. Spend

This represents an **35.3% increase** from 2017's spending during this period

16.8B

TV Ad Imp.

This represents a **9.6% decrease** from 2017's return during this period

2018 saw advertising on TV from these **4 brands (Amazon Echo, Google Home, Apple HomePod and portal from Facebook)**, while only **3 brands** were actively advertising on TV in 2017 (**Amazon Echo, Google Home and Sonos**).

Category Leader



Amazon Echo was responsible for the lion's share of this category's TV Ad spend, nearly doubling that of its nearest competitor, portal from Facebook, which also features an Alexa integration. Amazon Echo's own advertising was responsible **47.6% of the category's TV ad spend in 2018**, and nearly **60% of the category's TV ad impressions**. However, when combined with Facebook, **Alexa enabled products** were responsible for **72.5% of this category's TV advertising in 2018**, and **77.5% of the TV ad impressions delivered**.

| Top Networks | Top Shows |
|--------------|------------------------------|
| NBC | NFL Football |
| FOX | Super Bowl LII |
| CBS | Super Bowl LII Postgame Show |
| Adult Swim | The Voice |
| MTV | Family Guy |

“Voice Wars” - Year over Year

When comparing 2017’s results to 2018, it’s clear that the category has significantly increased the value it places on TV advertising. While two new brands (Apple HomePod and portal from Facebook) joined the fray, the category increased it’s TV Ad spend by over 35%, from \$293.7M to \$397.5M. However, the category actually decreased delivered impressions slightly, by nearly 10%, from 18.6B to 16.8B.

| Metrics | 2018 | 2017 | % Change |
|--------------------------|----------------|----------------|----------|
| Est. TV Ad Spend | \$397,458,034 | \$293,735,296 | 35.3% |
| TV Ad Impressions | 16,788,229,498 | 18,562,532,543 | -9.6% |
| Spots | 132 | 171 | -22.8% |
| Airings | 27,478 | 58,132 | -52.7% |

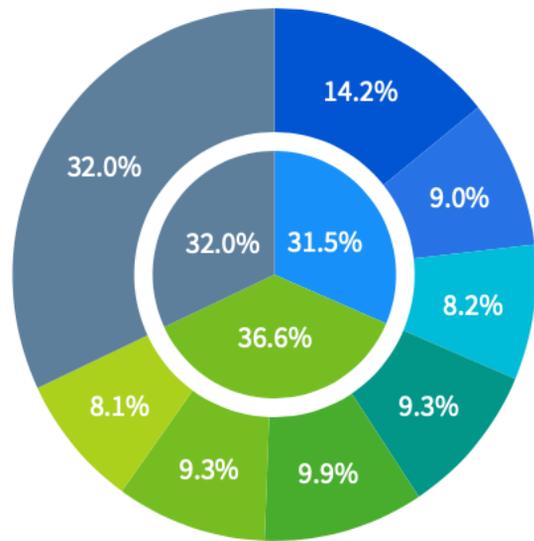
Audience

Amazon Echo

Impressions by Age Range: 01/01/2018 - 12/11/2018

Data provided by iSpot.tv

- 18-34
- 18-24
- 25-29
- 30-34
- 35-54
- 35-39
- 40-44
- 45-49
- 50-54
- 55+

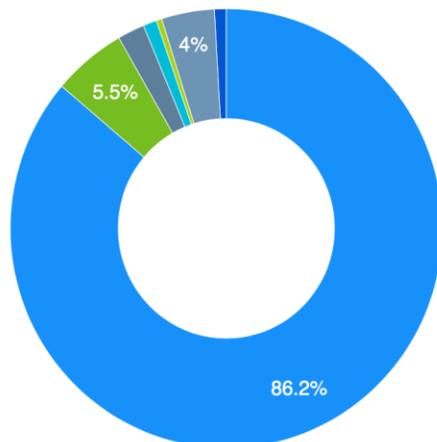


Amazon Echo

Impressions by Type: 01/01/2018 - 12/11/2018

Data provided by iSpot.tv

- National: Live + Same Day
- National: 3 Day Time-shifted (DVR or VOD)
- National: 4-7 Day Time-shifted (DVR)
- National: 8+ Day Time-shifted (DVR)
- National: Other (Unsupported Networks)
- Local
- VOD + OTT



Standout Creatives



[Google Home Mini’s “Fashion Upgrade”](#) delivered an **Attention Score of 98.44**, this ad was **interrupted 86% less frequently** than the industry average while generating over 14M TV Ad Impressions.



[Amazon Echo’s “Bedtime”](#) delivered an **Attention Score of 97.04**, this ad was **interrupted 58% less frequently** than the industry average even after generating over 295M TV Ad Impressions.



[Apple’s “Distortion”](#) composed of a simple text ad was the best performing spot for the brand. Delivering an **Attention Score of 92.47**, this ad was **interrupted 35% less frequently** than the average for the product line. This ad generated over 207M TV Ad Impressions.



[Portal from Facebook’s ‘Sisters’](#) was the best performing ad for Portal in 2018. With an **Attention Score of 94.20**, this ad was **interrupted 40% less frequently** than the industry average even after generating over 185M TV Ad Impressions.



[Apple’s “Welcome Home”](#) was the brand’s introduction their HomePod speaker. This beautiful ad featuring **Anderson.Paak** and **FKA Twigs**, generated over 220M impressions on TV alone, and had a **budget of over \$10.1M for TV placements**.

December Surprise: “Home Alone Again” by Google Assistant

Dec. 25, 2018 – Dec. 26, 2018

Approaching the tale end of the 2018 Christmas advertising season, Google Assist surprised audiences with a nostalgic ode to the 1990 John Hughes holiday classic “Home Alone.” The spot enlisted the film’s original star Macaulay Culkin to reprise his role as Kevin McCallister. This time Kevin is all grown up, and to aide him in his adventure is – “Google Assist.” With an **Attention Score of 90.0**, this ad generated over 28.6M TV Ad Impressions.



Center of Attention: Apple (Jan. 1, 2018 – Dec. 21, 2018)

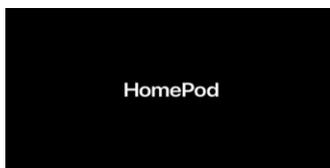


Apple took a dual approach to advertising its voice services this year. The company used traditional tactics surrounding the Apple HomePod launch, by running just five different 30 second spots, but also tested a new concept with shorter form 10 second ads, that were integrated into live NFL games. On Jan. 29th, Apple started running 30 second HomePod spots that centered around the Feb. 18th launch of the device. These ads ran through the launch and stopped on Mar. 20th with a total estimated spend of \$26M over 50 days. Apple’s traditional TV advertising model has been to “heavy up” their TV Ad spend around launch dates. The HomePod was no exception, as Apple focused most impressions on the Olympics, followed by Primetime Entertainment, and the NBA.

| Apple’s Top Genres (ranked by TV Ad Impressions) | Attention Score |
|--|-----------------|
| Sports: Olympics | 86.91 |
| Entertainment: Drama & Action | 89.12 |
| Sports: Pro Basketball | 91.20 |
| Sports: College Basketball | 85.39 |
| Entertainment: Comedy & Variety | 89.55 |



“Welcome Home”



“Distortion”



“Beat”



“Equalizer”



“Bass”

However, the overall **Attention Score** for all 5 Apple HomePod spots was just **61.0**, meaning these spots received **39% more interruptions** than other Voice Service ads.

In October, Apple added a new tactic to the Voice Wars, by running 10 second ads that were integrated into live NFL Broadcasts. In this clever integration, Apple ads were played as a ticker at the bottom of the screen while the NFL game went to commercial. In the ad, Siri is called on to find out more information on the NFL games.



From Oct. 14th – Dec. 21st Apple has generated 63.6M TV Ad Impressions by employing the shorter form Siri ads into NFL games, with an estimated spend of about \$380k to reach this audience. The short form ads also paid off in attention, receiving an **Industry Index of 169**, meaning these spots received **69% less interruptions** than other Voice Services ads. Not only was the 10 second creative a seamless use of the product, but Apple saw significantly higher attention, while reaching a larger audience, at a fraction of the cost of the HomePod ads.



iSpot is a TV advertising measurement company that brings transparency, digital-like precision, and control to disruptive brands. The real-time platform empowers marketers with a complete view of advertising impressions, engagement, attention and conversion across all forms of TV, and connect those analytics to business outcomes.

Request Demo

Learn more at [iSpot.tv](https://www.ispot.tv)