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2023 Super Bowl Advertising Effectiveness

A data driven analysis



Introduction

With 30-second spots costing $7 million on average, the Super Bowl remains a high-stakes, high-profile opportunity for advertisers. This report evaluates the efficacy of ads aired at and around the 2023 Super Bowl.

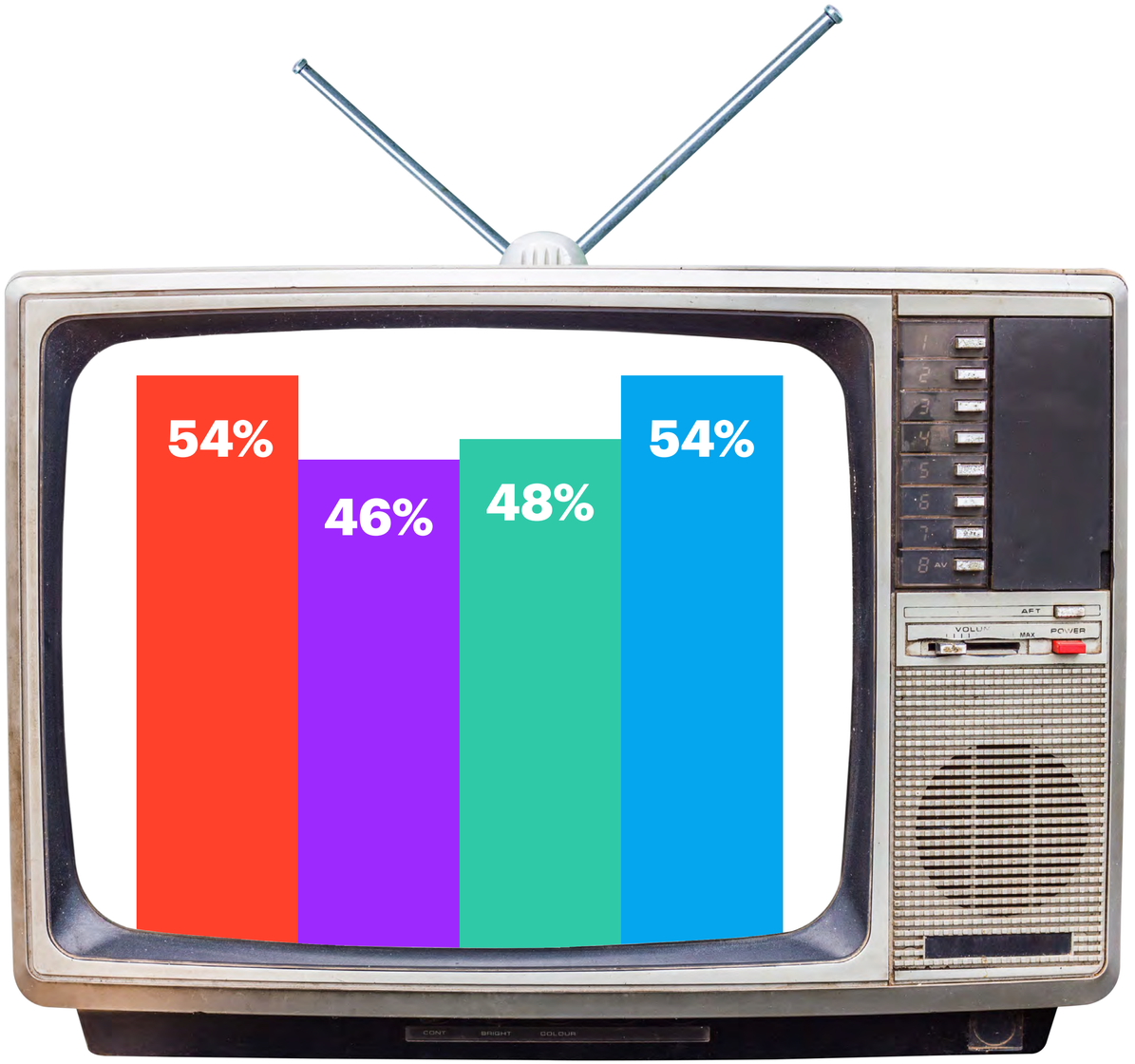
Is America's biggest event still capturing the zeitgeist? **Who generated the most awareness and purchase consideration?** Were there advertisers who flew under the radar but scored big in terms of consumer consideration lift anyway? And, ahead of the 2024 Super Bowl, what learnings should brands take into their activations in Las Vegas?



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Is America's Big Game Back?

America's top annual sporting event, the Super Bowl saw a significant dip in viewership in 2021 and 2022, as concerns about COVID-19 clouded the game and limited watch parties. However, YouGov survey data shows Super Bowl viewing bounced back in 2023, matching the pre-pandemic level of 2020. **Did the increased viewership impact the results for advertisers?**



% Watched (Gen pop)

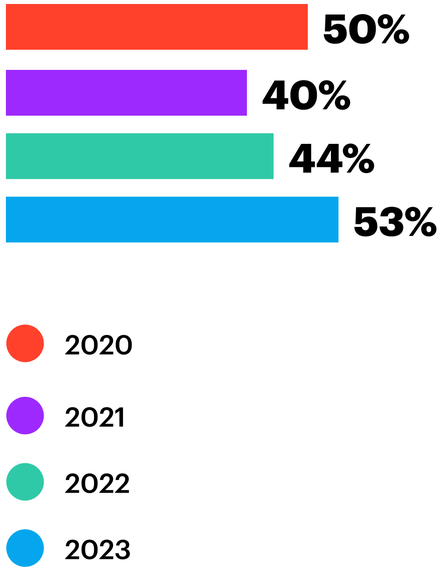
YouGov asks Americans after each Super Bowl which activities they did during the game. This percentage captures anyone who reported watching the whole game, part of the game, half-time programming, or anyone who attended a Super Bowl party. N>7,000

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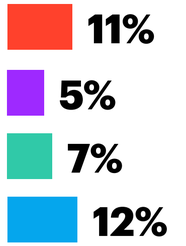
Halftime Show High

The Super Bowl halftime show hit a post-pandemic viewership high, with superstar Rihanna attracting a broader audience. This rise in viewing may also be due to more Americans attending Super Bowl parties, where the halftime show is often treated as the main event. 2024's halftime show seeks to continue this growth, with Usher taking the stage in Las Vegas.

Super Bowl Halftime Show Viewership
(Gen pop)



Percentage of Americans attending Super Bowl Parties
(Gen pop)



YouGov Profiles (N>7,000)

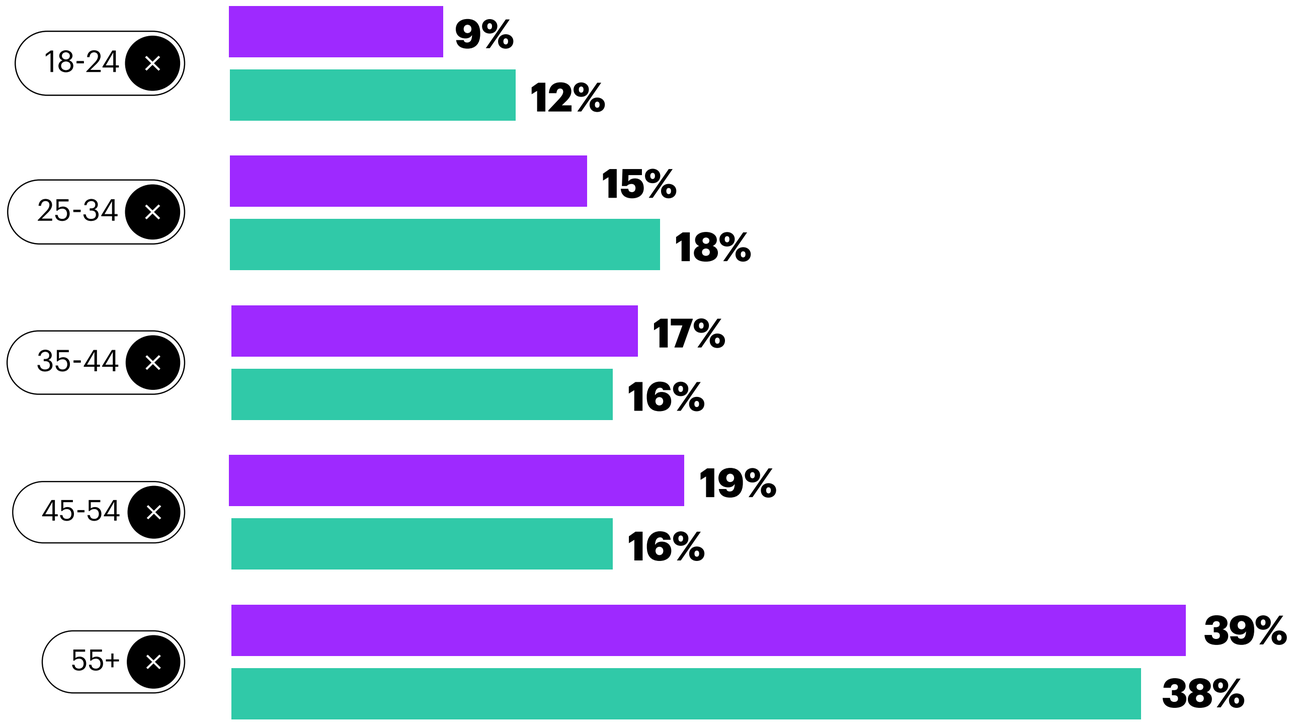
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Who are the NFL's core fans?

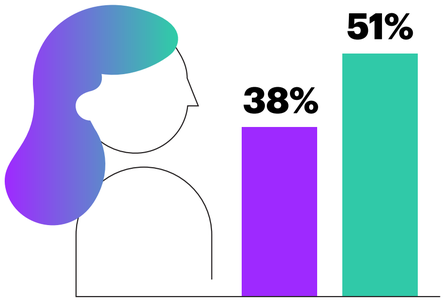
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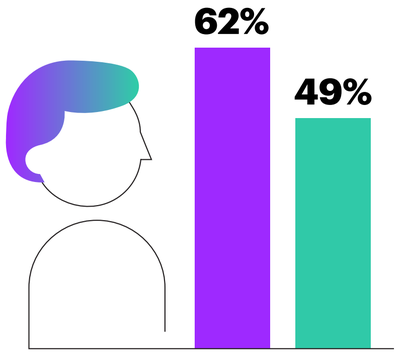
2024 NFL super fans Gen pop

Age



Gender





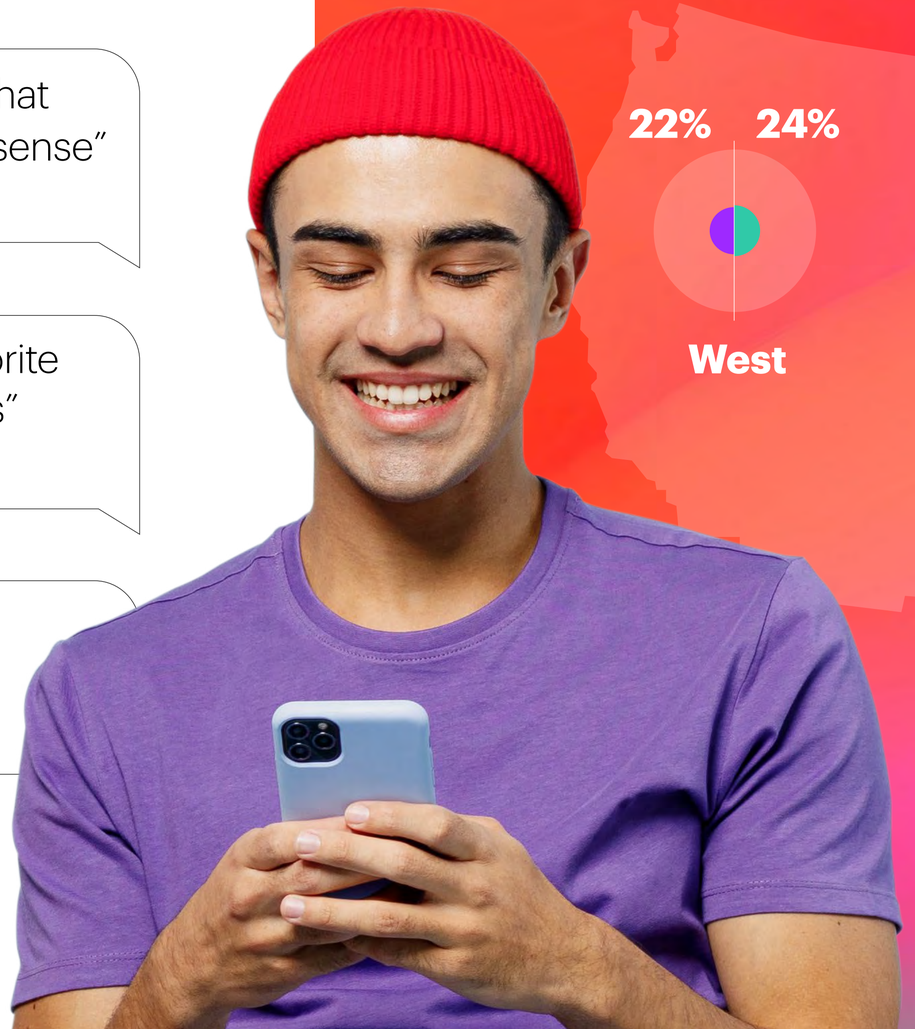
YouGov Profiles: NFL is a "top interest" (N>25,000; January 2024)

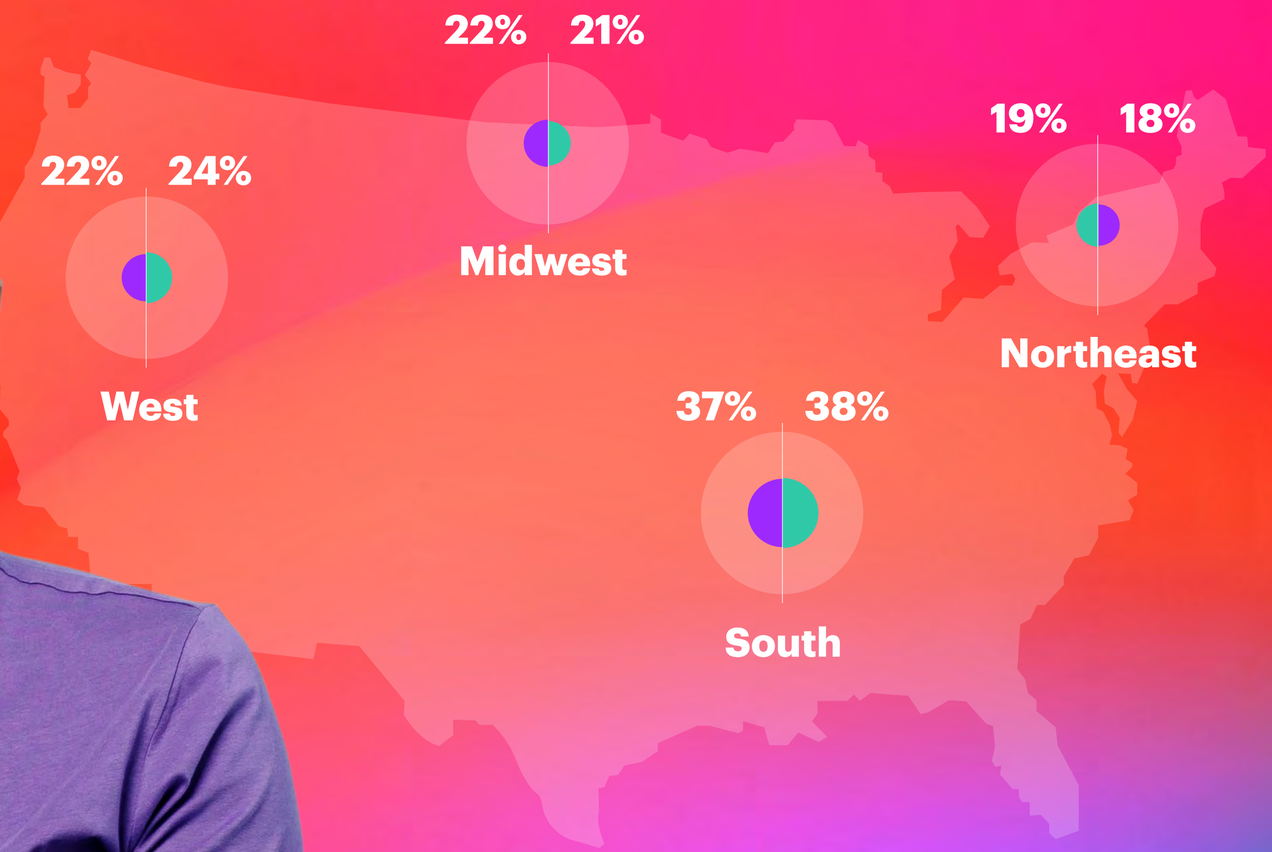
What do NFL Fans think about advertisers?

"Sometimes the brands that sponsor sports don't make sense"
62% vs **56%**

"I love seeing that my favorite team has cool sponsors"
52% vs **40%**

"Advertising helps me choose what I buy"
50% vs **46%**





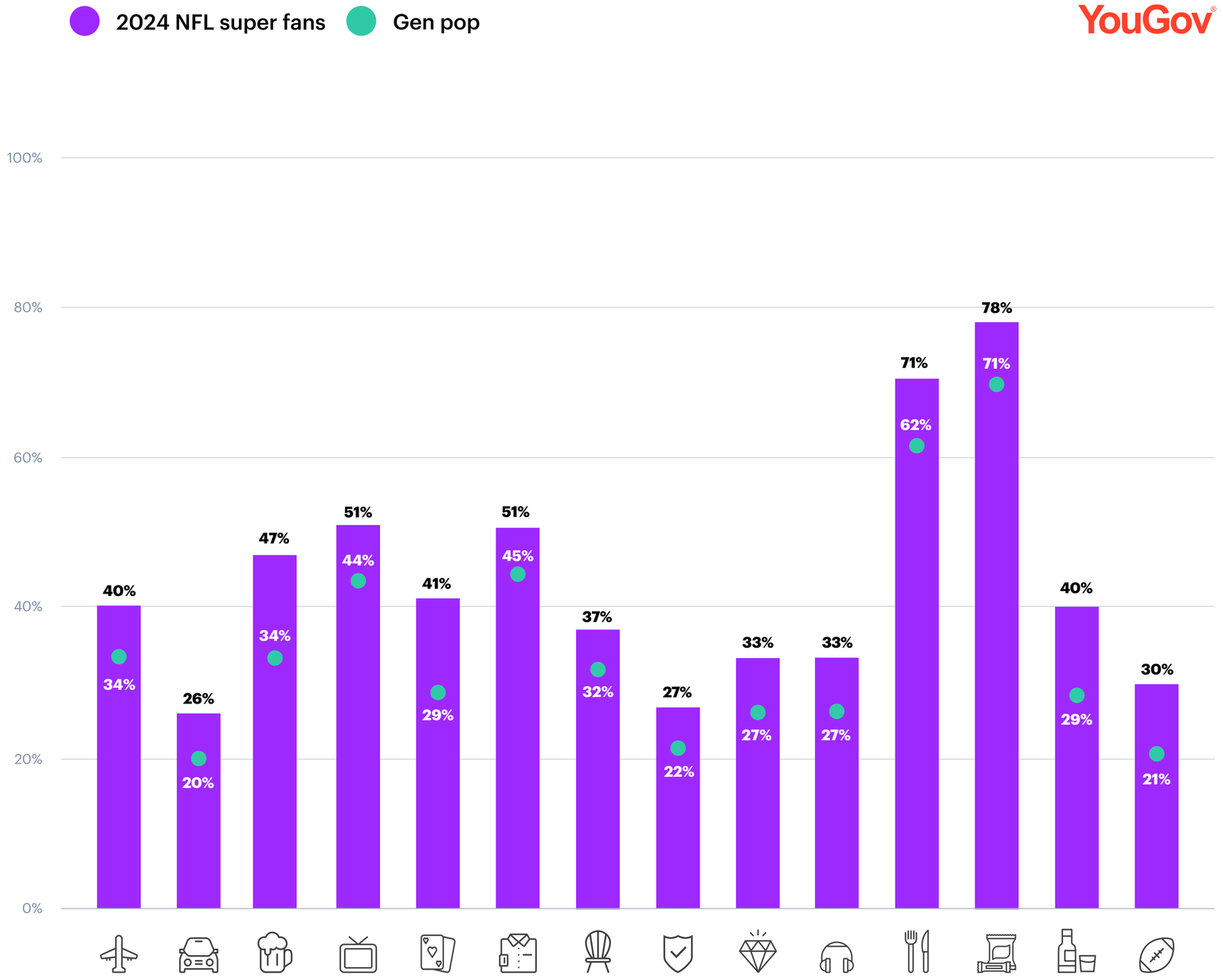
YouGov Profiles: NFL is a "top interest" (N>12,000; January 2024)

What's on their shopping list?

To understand which advertisers can benefit most from Big Game campaigns, we compared in-market purchase intent for Super Bowl fans with the general population. NFL fans over-indexed in multiple categories, **notably alcohol, casinos and sporting goods.**

- Airlines
- Auto
- Beer
- Cable
- Casinos
- Clothings
- Home goods
- Insurance
- Luxury goods
- Music
- Restaurants
- Snacks
- Spirits
- Sporting Goods

YouGov Profiles: NFL is a "top interest" (N>3,000; January 2024)



Evaluating Super Bowl Ad Effectiveness

Using YouGov BrandIndex, we've analyzed the Ad Awareness, Buzz and Consideration scores of 10 advertisers who ran spots during the **2023 Super Bowl.**

We average survey responses from NFL Fans about each brand for a period of one week before the Super Bowl and three weeks after the Super Bowl, comparing those average scores to averages from the preceding four weeks.
This methodology does not account for variances in ad flighting, but gives a quick snapshot of a campaign's immediate impact.

RSVP for 2024 recap webinar ›

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2023 Super Bowl Spots

Feb 12, 2023:

Kansas City Chiefs

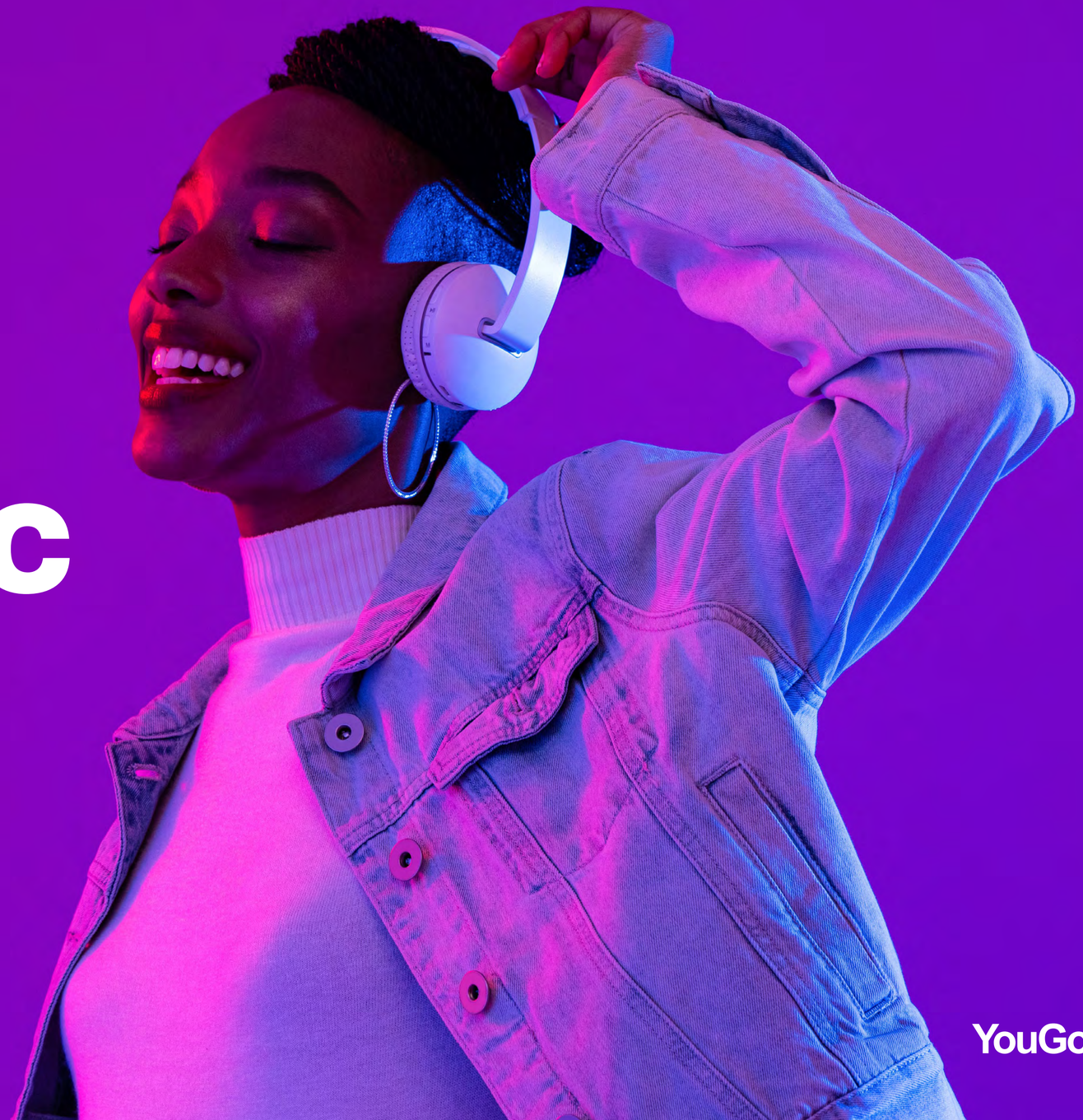
VS

Philadelphia Eagles



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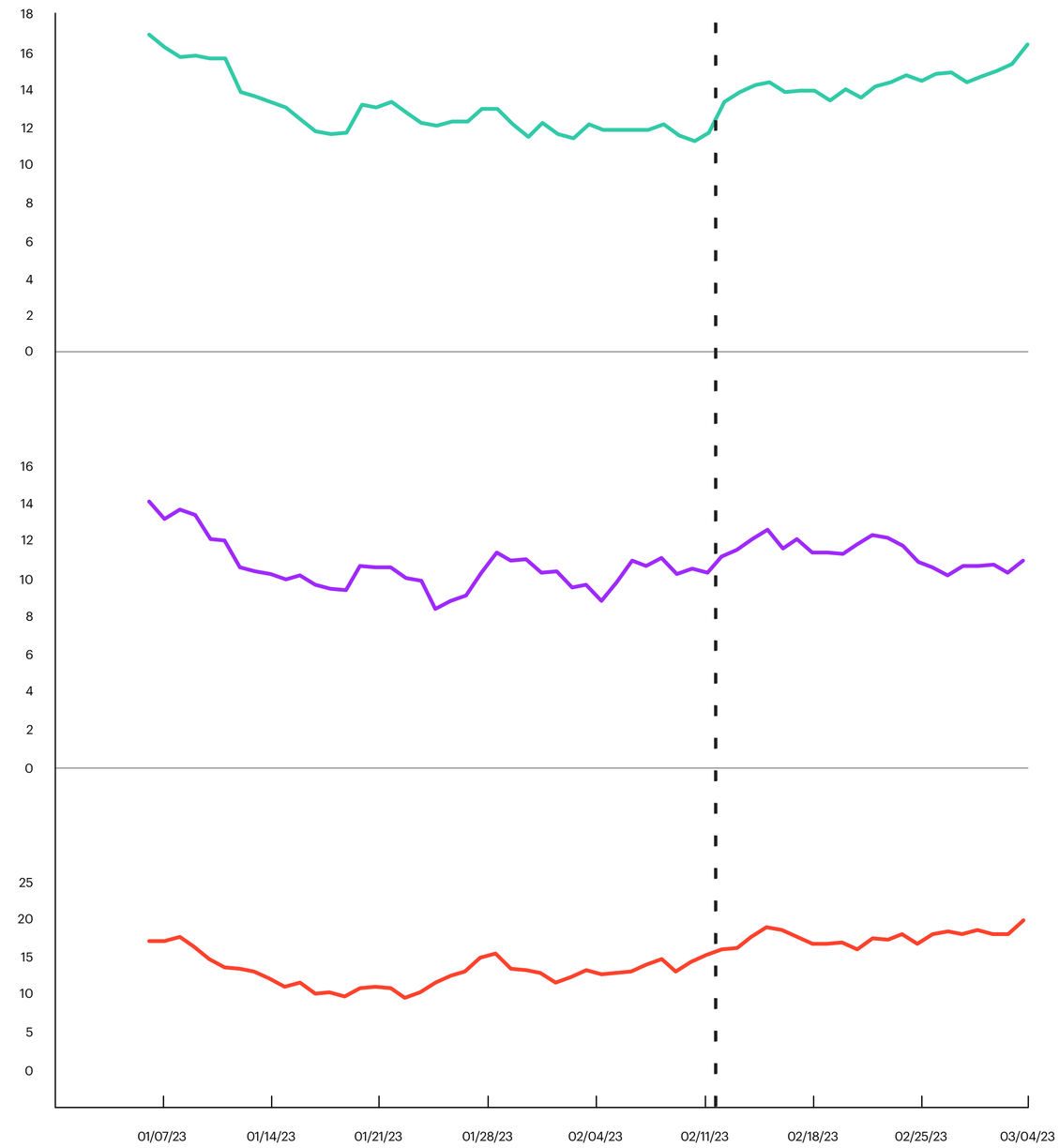
Apple Music



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Apple Music

As presenting partner of the halftime show which featured the return of Rihanna, Apple Music saw a nice bump in Ad Awareness immediately following the Big Game. While halftime show Buzz centered squarely on the singer's powerful comeback performance, Apple's streaming music platform also registered a meaningful increase in Consideration (+2.3) in the weeks following. Apple Music is returning in 2024 as the presenting sponsor of the halftime show, which will spotlight Usher in sin city.



YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>325)

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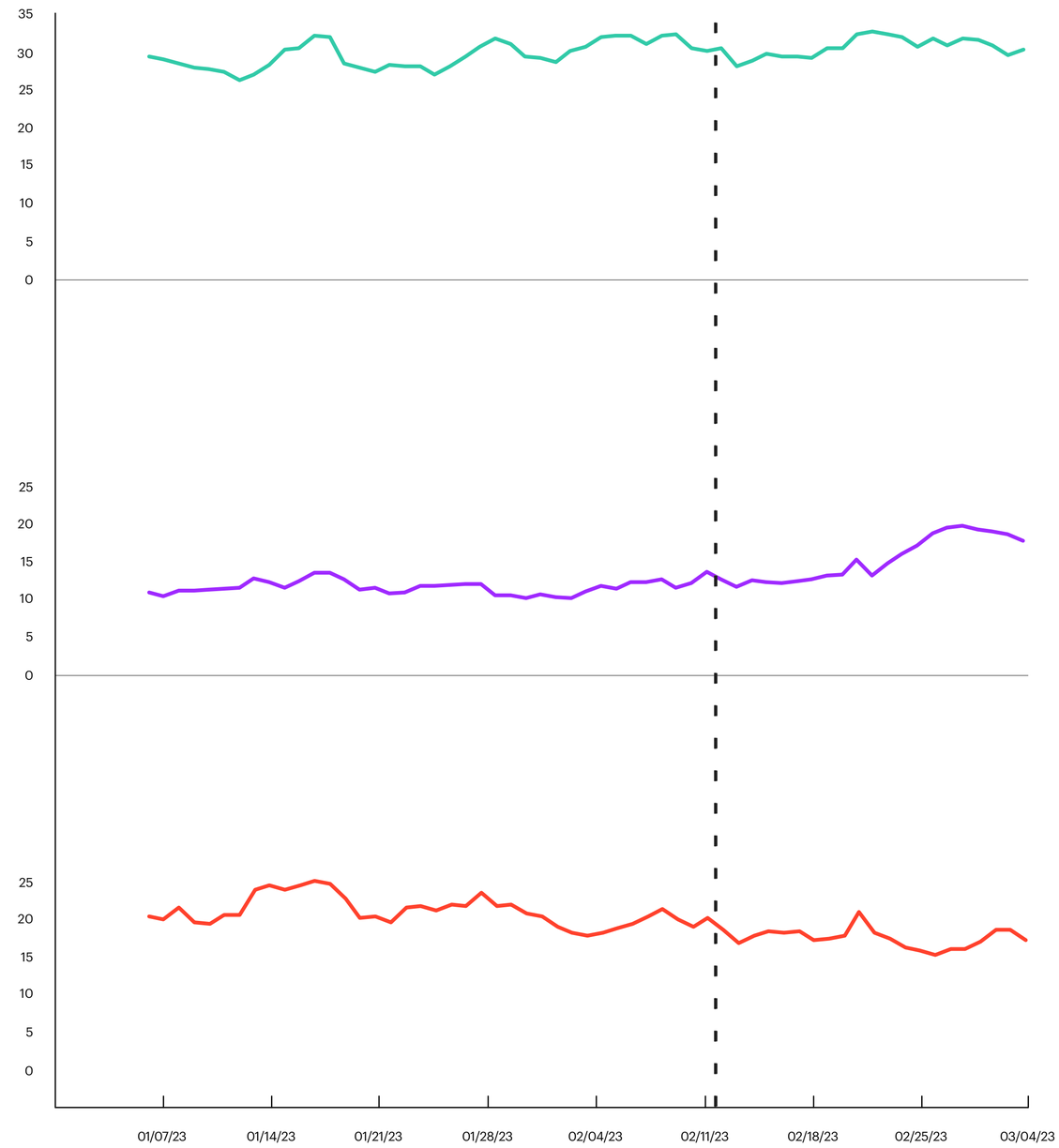
Bud Light



Bud Light

Anheuser-Busch ended its 30+ year exclusivity deal with the Super Bowl, making room for other alcohol brands to advertise in 2023. This didn't stop the brewer from purchasing airtime, as its spot featuring Miles Teller seemed to resonate with NFL fans, as Ad Awareness and Buzz trended upwards. However, Consideration ultimately declined, with competitors claiming a greater share-of-voice. This dip preceded the brand's documented challenges later in the year.

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YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>225)

Busch Light



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Busch Light

Another beer brand from AB InBev, Busch Light led all Big Game advertisers with a whopping +5.7 increase in Ad Awareness among NFL fans. Busch Light's 30-second spot featuring and satirizing Sarah McLachlan's guilt-inducing ASPCA commercials spurred conversation among viewers as well, with a strong +2.4 lift in net Buzz, as well as a jump in Consideration post-Super Bowl that counteracted a decline among NFL fans through the playoffs.

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YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>225)

Crown Royal

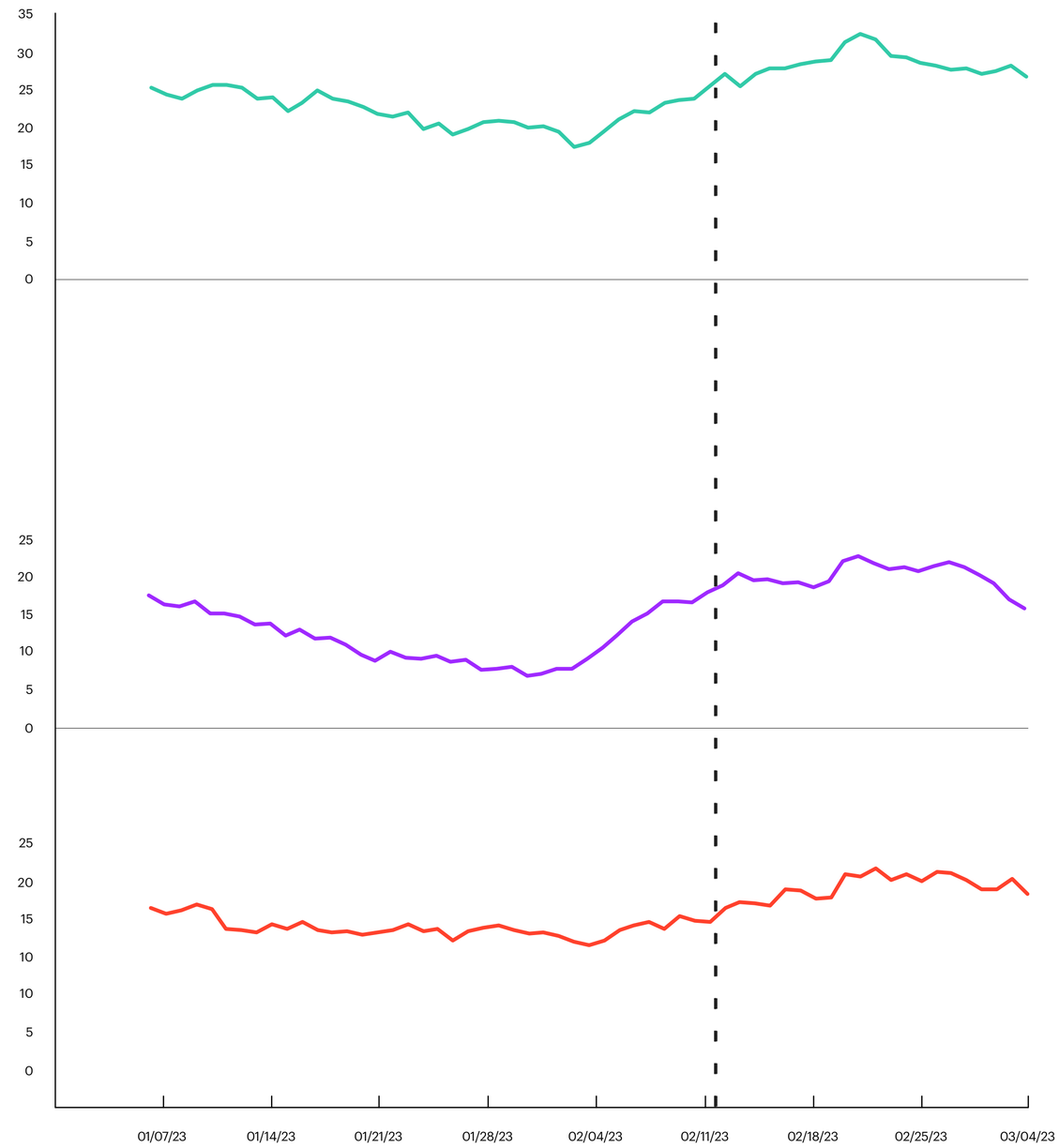


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Crown Royal

Diageo made its Super Bowl debut in 2023, airing a fun ad featuring Foo Fighters' frontman Dave Grohl thanking Canada for its many creations, including the whoopie cushion, football, and, of course, Crown Royal. The spot was a smashing success, ranking in the top 3 with NFL fans among all brands measured across Ad Awareness (+4.1), Buzz (+6.4) and Consideration (+2.9). Business Insider named Edward Pilkington, chief marketing and innovation officer for Diageo North America, one if its most innovative CMOs of the year, citing the success of this ad.

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YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>150)

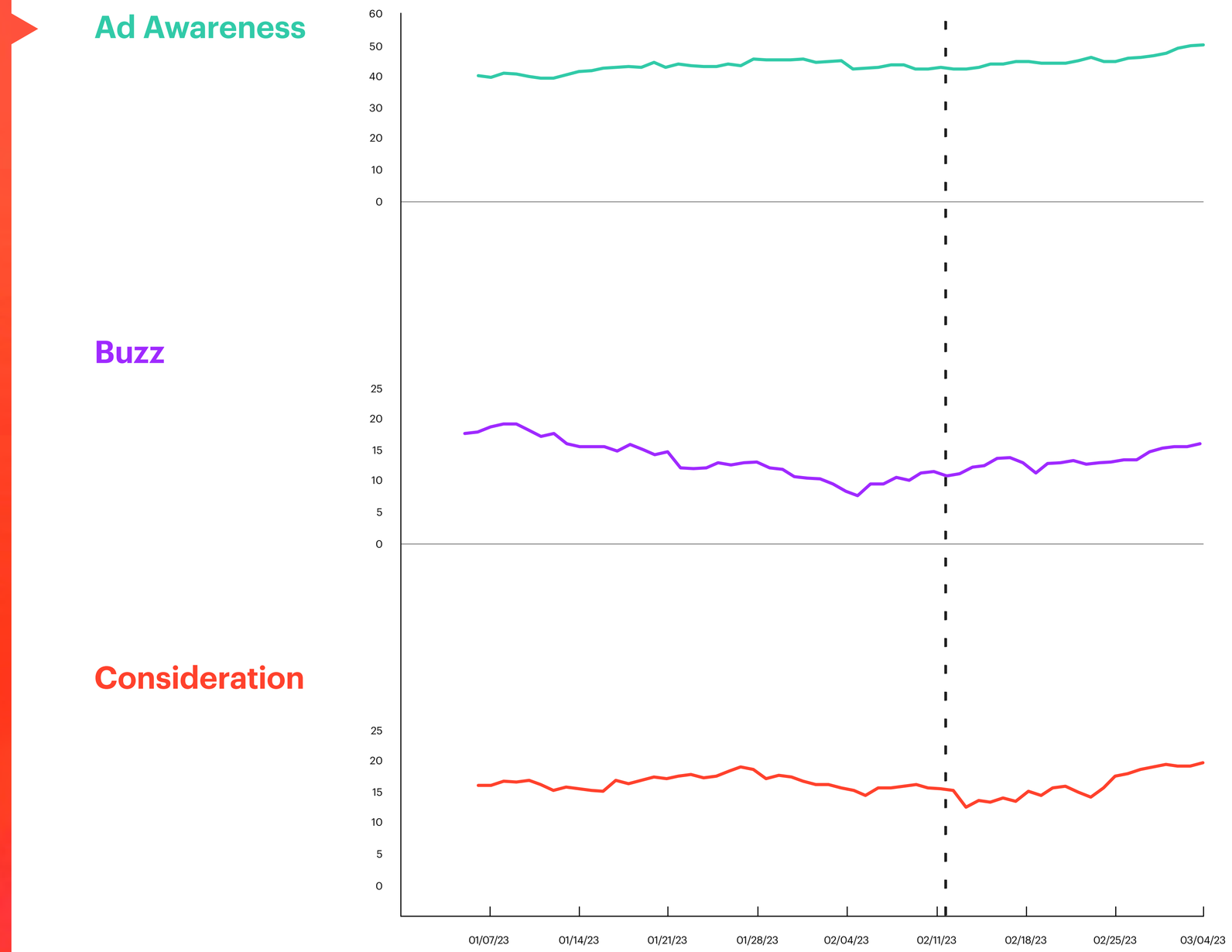
DraftKings



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DraftKings

Sportsbook DraftKings teamed up with Molson Coors for this year's Super Bowl campaign, offering viewers the chance to bet on the content of the brewing company's ad. It also ran a star-studded spot with comedian Kevin Hart. While DraftKings' already-high Ad Awareness increased slightly (+1.9), Buzz and Consideration both declined as it came off second best in the battle of the sportsbooks with FanDuel.



YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>225)

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FanDuel

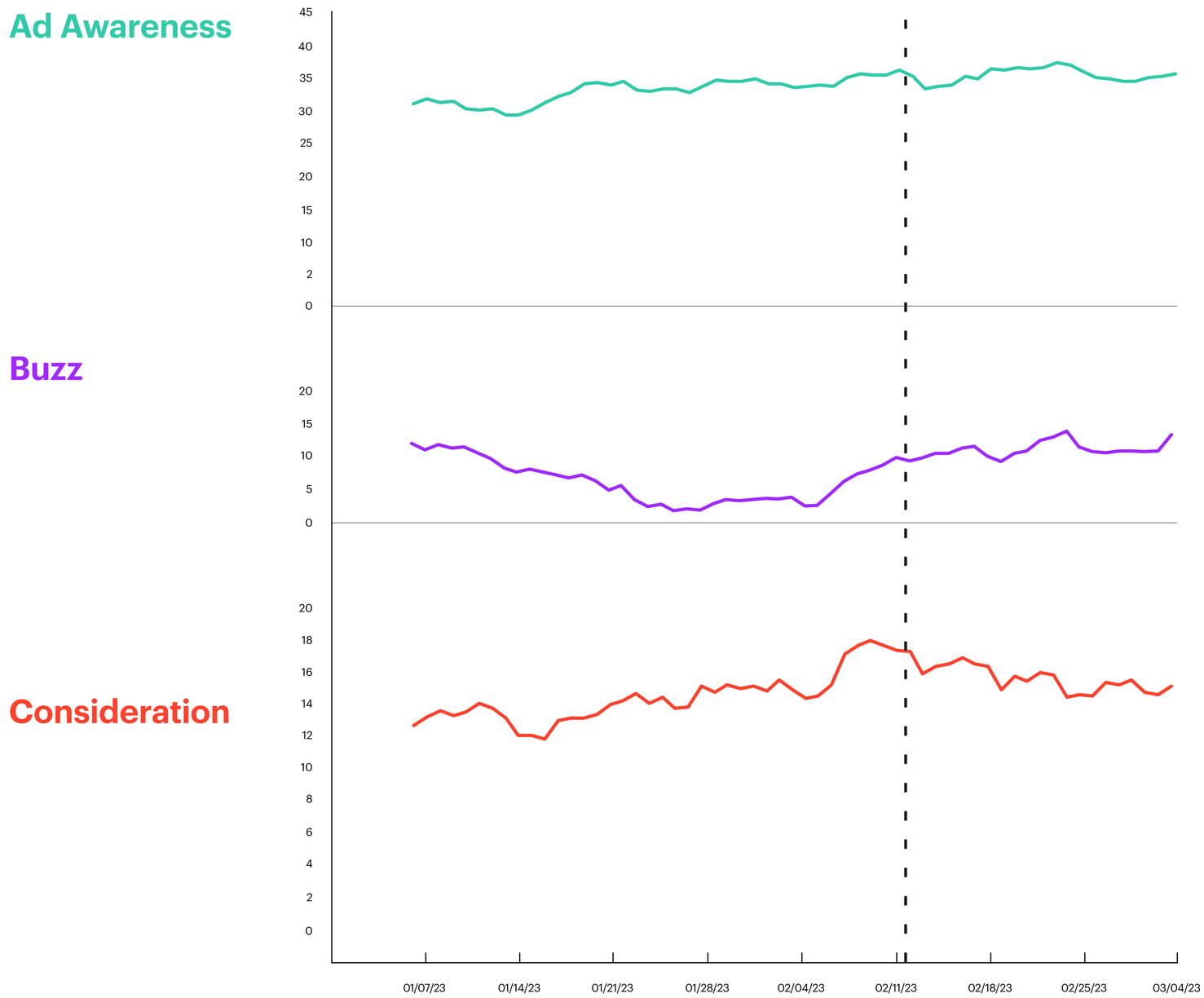


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FanDuel

FanDuel's month-long Super Bowl campaign featured retired tight-end Rob Gronkowski preparing for his "Kick of Destiny." The live field goal attempt during the Big Game gave customers of the sportsbook a chance to win $10 million in bonus bets. Gronk eventually missed his kick, but FanDuel scored a strong lift in Ad Awareness (+2.8), Buzz (+2.8) and Consideration (+2.3). Fortunately for Gronk, FanDuel has offered him a chance at redemption, bringing him back to try the kick again in 2024.

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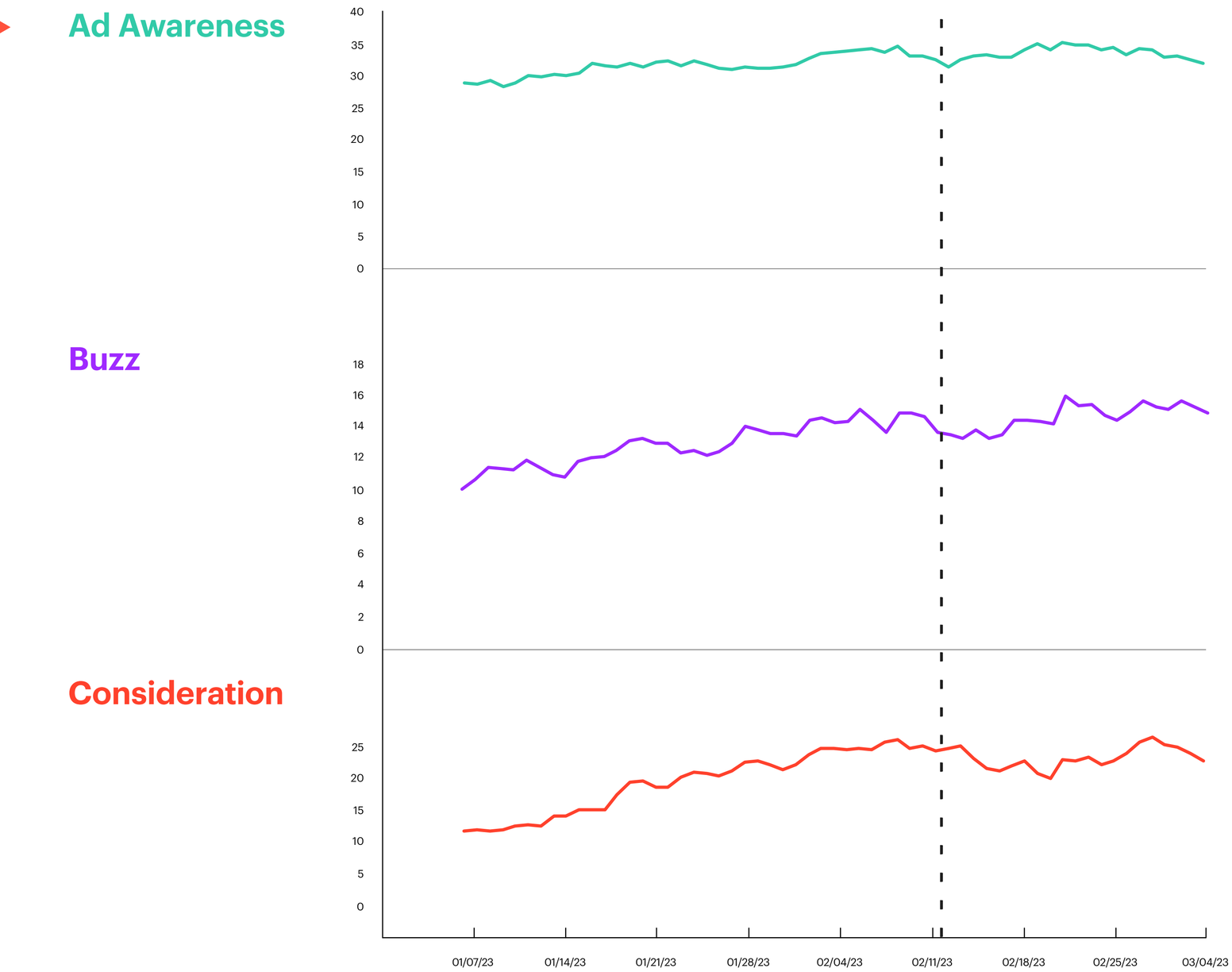
YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>225)


Jeep
RUBICON
WRANGLER
YouGov

Jeep

Jeep's Super Bowl spot featured safari animals dancing to the "Electric Boogie," performed by Marcia Griffiths and Shaggy. Showcasing its Wrangler and Grand Cherokee hybrid EVs going offroad and with an underlying sustainability message, the campaign did a great job of revving up Jeep's Ad Awareness (+2.3), Buzz (+2.2) and Consideration (+3.3) scores in the weeks following the Big Game.

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YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>275)

M&Ms

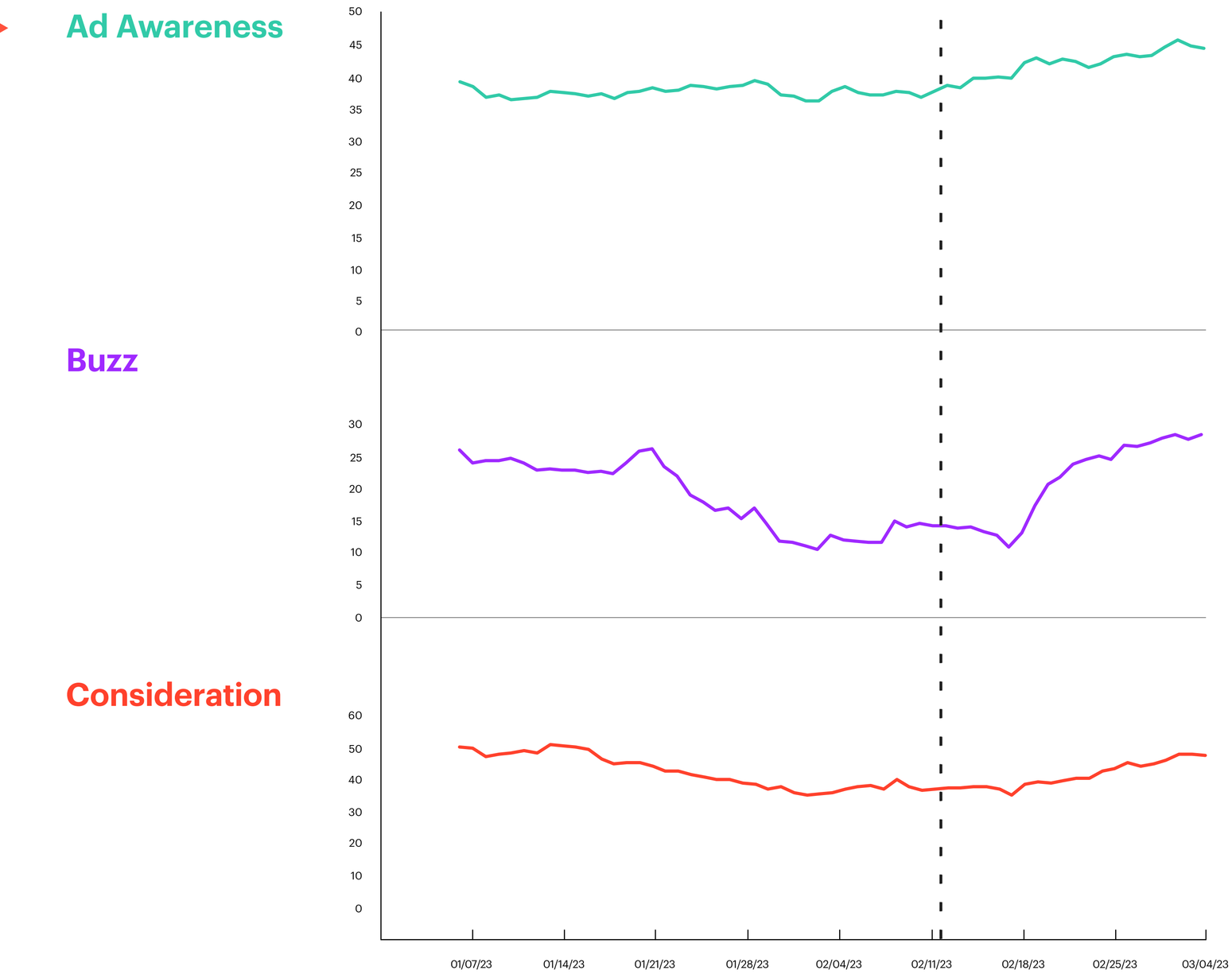


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M&M's

M&M's kicked off its Super Bowl campaign in late January by announcing it was replacing its long-serving "spokescandies" with comedian Maya Rudolph. The news resulted in a steep decline in Buzz pre-Super Bowl. Then, in its tongue-in-cheek Big Game spot, Rudolph appeared pronouncing that M&Ms would now be named "Ma&Yas" and be filled with clams, not chocolate. While the candy brand saw Ad Awareness lift (+3.9) in the following weeks, its lofty Consideration score declined.

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YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>200)

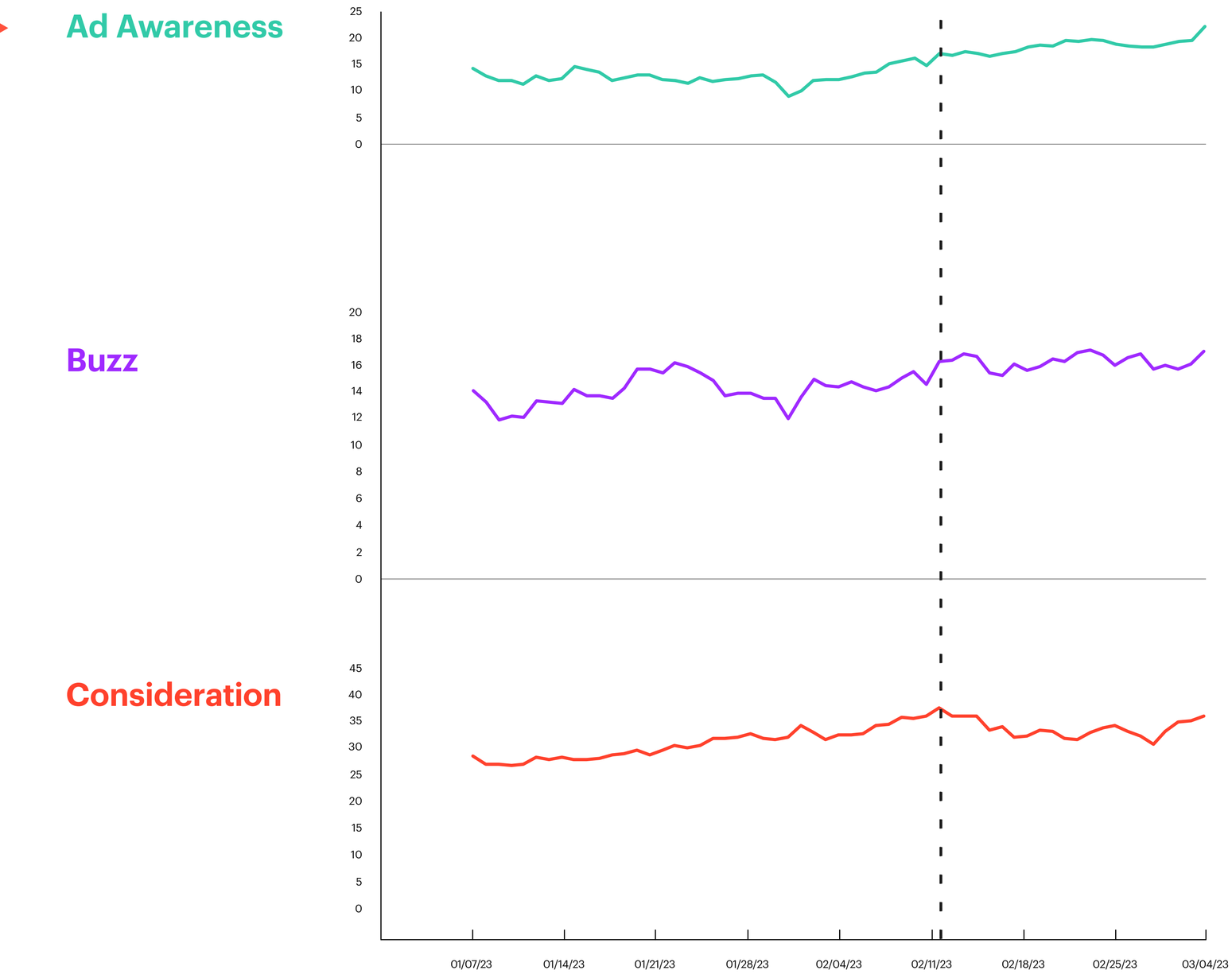
Planters



Planters

The campaign was nuts, but it worked. Judging by the +3.7-point increase in Consideration among NFL fans, Planters' "Roast of Mr. Peanut" has claim to the top-performing advertising campaign of the 2023 Super Bowl. The 30-second spot features acclaimed roastmaster Jeff Ross and promotes a 10+ minute extended cut, indicating that quality, longform video creative can generate great results as attention spans supposedly shrink.

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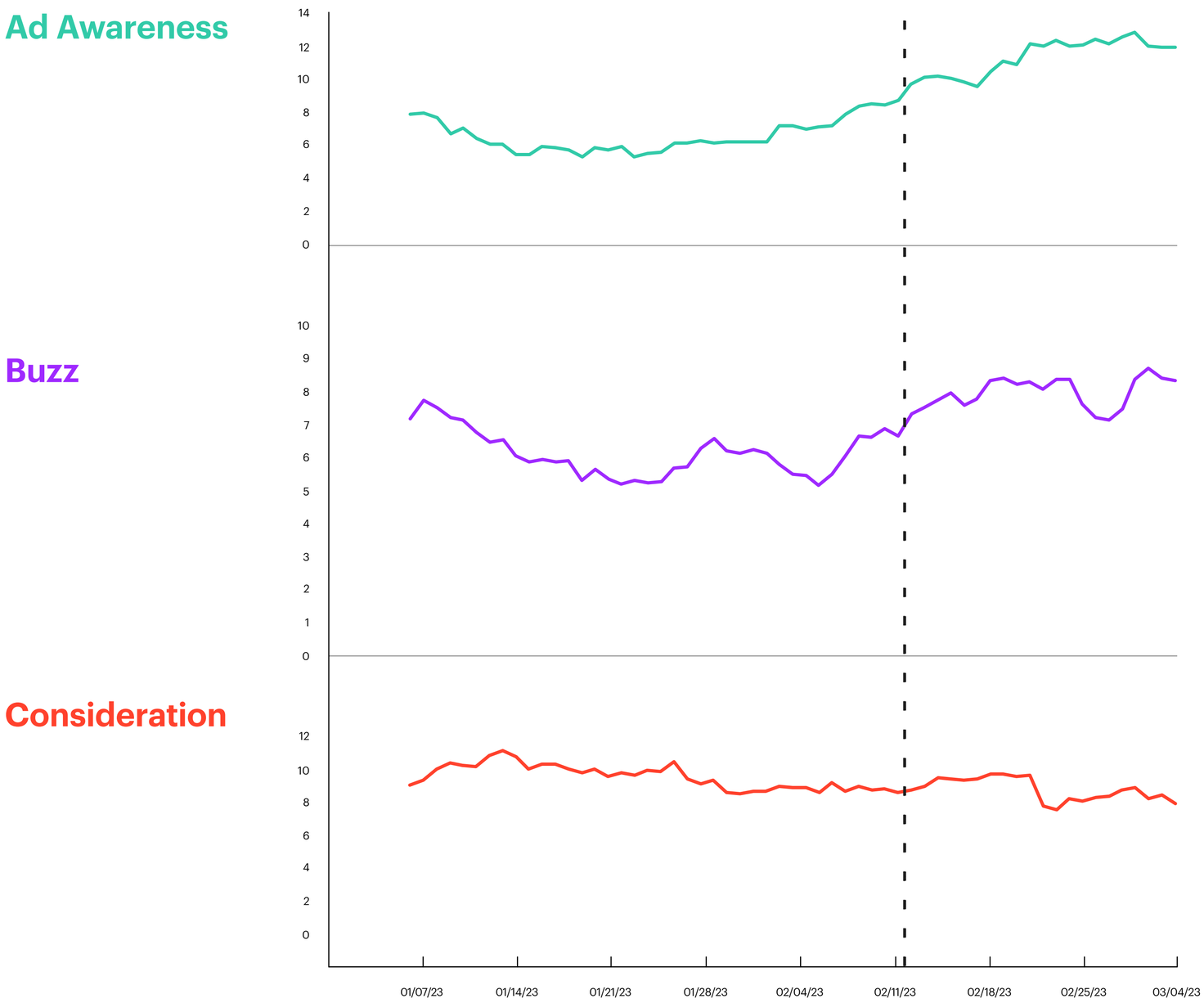
YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>200)


Tubi

Tubi

The most unique and possibly divisive ad of the 2023 Super Bowl, Tubi's native integration into the 4th quarter broadcast fooled streamers into thinking someone had sat on the remote. The stunt proved successful in generating attention among NFL fans, with a 3.7-point increase in Ad Awareness and 1.6-point increase in Buzz. However, Consideration dipped as the newly aware Americans opted against adding the streaming service to their media diet, for now.

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YouGov BrandIndex: January 7 - March 6, 2023 (Filter: NFL super fans, 28 day moving average, N>500)

So, does Super Bowl advertising work?

Looking at the **10 brands** profiled from the 2023 Super Bowl, it's clear that the biggest sporting event in America can deliver big results, with all brands profiled improving in Ad Awareness.

However, there's never a guarantee that the message will resonate, and target audience matters. For example, M&M's declined in Consideration with NFL Fans but was the top advertiser with a general audience during a similar timeframe, meaning its advertising transcended the Big Game and impacted the national conversation.

Advertiser	Change in Ad Awareness	Change in Buzz	Change in Consideration
Apple Music	0.5	0.4	2.3
Bud Light	1.5	2.6	-1.9
Busch	5.7	2.4	-0.1
Crown Royal	4.1	6.4	2.9
DraftKings	1.9	-2.1	-0.7
FanDuel	2.8	2.8	2.3
Jeep	2.3	2.2	3.3
M&M's	3.9	-0.9	-2.4
Planters	3.3	1.8	3.7
Tubi	3.7	1.6	-0.7

YouGov BrandIndex: Average of NFL Fans responses: February 6 – March 6, 2023 vs January 7 – February 5, 2023

Methodology

Using audience intelligence platform YouGov Profiles, NFL Fans are identified as the **~22% of Americans who indicated that the NFL as one of their "top interests."**

All demographic, psychographic, and in-market data about NFL Fans comes from YouGov Profiles' January 14, 2024, and averages a year's worth of survey responses.

Advertiser profiles are based on syndicated data from daily brand health tracker YouGov BrandIndex, and reflect the view of the 21% of Americans who indicated that the NFL was one of their "top interests" in early 2023.

Re-contact YouGov's panel of nearly 7 million Americans with YouGov Surveys.

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Running a major ad campaign in 2024?

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touch to measure your performance.

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Thank you

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