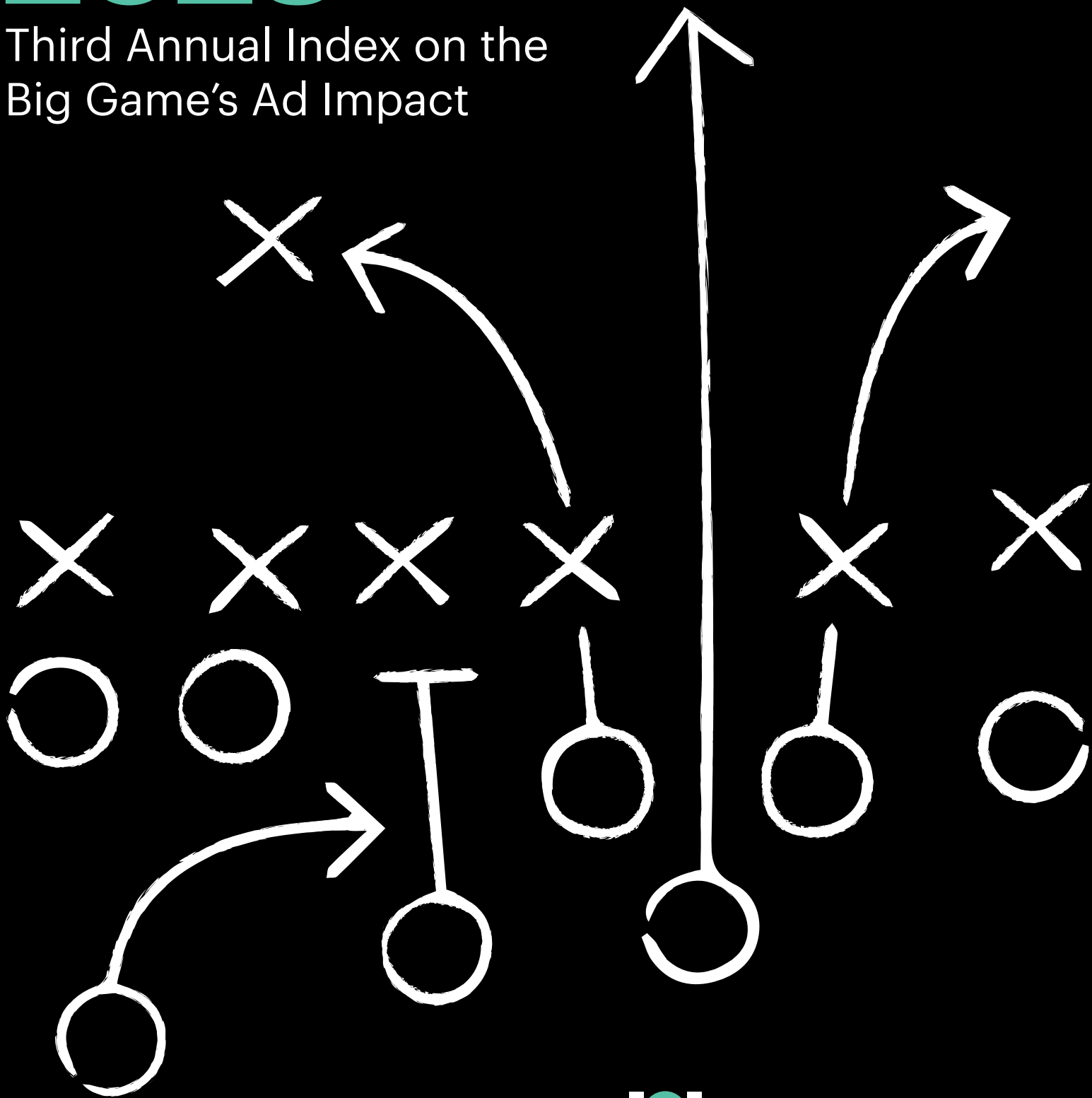


Brand Bowl

2023

Third Annual Index on the
Big Game's Ad Impact



The Harris Poll



The Harris Poll's 2023 Brand Bowl index exposes the impact that Super Bowl LVII's commercials had on advertisers' brand health. Super Bowl ads are a hefty investment. The price tag for some of this year's 30-second slots crept above \$7 million. Despite the cost, brands wanted in. Fox had already sold 95% of its Super Bowl ad spots by early September.

The Super Bowl is not only football's big day, it's also a chance for the country's top creative teams to compete for America's attention. Fortunately for advertisers, 76% of US adults expressed excitement to see this year's ads. Even more (83%) consider watching ads an essential part of the Super Bowl experience.

Three-quarters (74%) of US adults said they watched Super Bowl LVII. While some viewers showed up for the football, many others tuned in for the halftime show, the ads, or for the chips and dip. Over half (60%) of US adults agree that the Super Bowl game itself is usually overshadowed by related festivities (e.g., sports betting, watch parties).

With that in mind, grab some PopCorners, crack open a Bud Light (or a Pepsi Zero Sugar for the under-21 crowd), and let's take a closer look at Super Bowl LVII's advertising wins!

A BREAK DOWN OF OUR 2023 RANKINGS

Our third annual Brand Bowl index uses Harris Brand Platform data to determine the change in brand equity – consumers' perceived value of a company – from pre- to post-Super Bowl for companies who confirmed their intent to run national ads by February 10, 2023.

As the Super Bowl has evolved into one of the biggest brand events of the year, more companies are teasing their intent to run ads prior to the big game. To account for the lift that brands may receive ahead of Super Bowl Sunday, we have added a new data point to this year's summary.

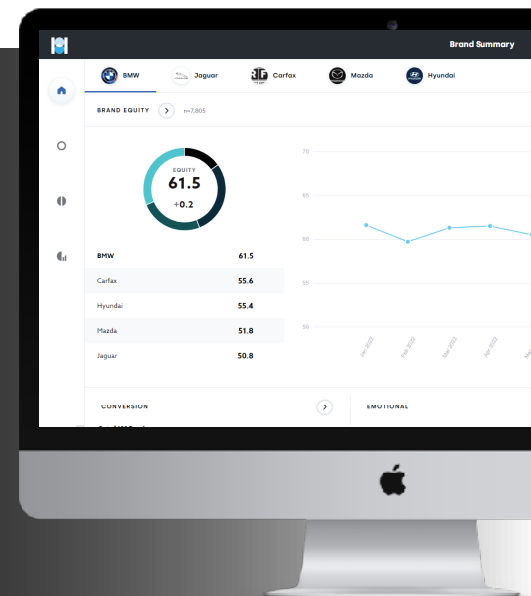
Throughout the report, you will see a column titled "Pre + Post-Super Bowl," which captures responses from 2½ weeks before the Super Bowl, as well as the immediate two days following the Super Bowl in our "post" data. As always, we are still including a column for immediate impact winners ("Post-Super Bowl") which measures the lift from the ads on Super Bowl Sunday.

SEE WHERE THE DATA COMES FROM

HARRIS BRAND PLATFORM

Harris Brand Platform polls thousands of people every day to provide real-time, global intelligence on thousands of brands.

[LEARN MORE](#)



A QUICK RUNDOWN OF THIS YEAR'S INDEX



Super Bowl LVII's Brand Equity Winners

Paramount+, PopCorners, Peacock, and The Farmer's Dog experienced the greatest lifts in brand equity after Super Bowl LVII.



Viewers Wanted Amusing and Lighthearted Ads

US adults spell out what they were hoping to see from this year's advertisers, and it did not involve tears or drama.



The More Food, The Better

Viewers are hungry for more food and beverage commercials, but have less of an appetite for personal care and financial services ads.



New Kids on the Block

This year saw 16 first-time Super Bowl advertisers as a number of new brands threw their hats into the national advertising arena.



The Doors Open for Alcohol Advertising

AB-InBev relinquished their 33 year Super Bowl alcohol ad monopoly, opening the door for new alcohol brands to join the fray.



Brand Bowl Ad Recall Tracker

This year's Super Bowl ads certainly were memorable - see which brands made our Ad Recall chart along with Pringles and the NFL!



Americans' Comfort with Sports Betting Rises

As sportsbook brands continue to invest in Super Bowl ads, Americans are more willing to support legalized sports betting.



Other Brand Sponsors See Lift for their Involvement

State Farm, Apple Music, Fox, and Gatorade all gained valuable visibility for their Super Bowl involvement outside of traditional commercials.



How Many QR Codes Did You Catch?

Hope you had your phone at the ready. This year's advertisers fully embraced the scannable QR code...we counted five this Super Bowl!



Serena Williams Makes Us Double Take

The star tennis player appeared in not one but TWO Super Bowl ads, both for alcohol brands - Michelob Ultra and Rémy Martin.

BRAND BOWL INDEX: BRAND EQUITY











This index uses Harris Brand Platform data to measure the growth in each Super Bowl advertiser's **brand equity**. The change in brand equity captures whether a brand's Super Bowl ad effectively increased consumers' perceived value of the company.

The **"Post-Super Bowl" column** compares data from pre-Super Bowl (Jan 30-Feb 12) to post-Super Bowl (Feb 13-14). This captures the lift advertising brands experienced after the Big Game. The **"Pre + Post-Super Bowl" column** compares responses from early-to-mid January (Jan 1 – 22) to the official 'kickoff' of Super Bowl season and beyond (Jan 23 – Feb 14). These new data points capture the lift that advertisers realized from the pre-Super Bowl hype (e.g., announcing a spokesperson, pre-Super Bowl social media content, release of ads).









POST-SUPER BOWL

Pre: Jan 30-Feb 12 | Post: Feb 13-14

	PRE	POST	GROWTH
	45.4	51.0	5.6
	17.5	21.3	3.8
	46.4	50.1	3.7
	50.3	53.7	3.4
	8.7	12.0	3.3
	24.4	27.2	2.8
	40.0	42.8	2.8
	52.4	55.0	2.7
	62.6	65.1	2.5
	56.6	58.4	1.8

PRE + POST-SUPER BOWL

Pre: Jan 1-22 | Post: Jan 23-Feb 14

	PRE	POST	GROWTH
	43.9	48.9	5.0
	13.0	17.5	4.5
	36.7	41.1	4.4
	16.1	19.7	3.6
	29.7	33.1	3.4
	63.1	65.9	2.8
	51.3	54.1	2.7
	36.7	39.1	2.4
	73.2	75.6	2.4
	44.0	46.3	2.3












MOMENTUM

This index uses Harris Brand Platform data to rank the top 10 advertisers with the **greatest increases in momentum**, which measures consumers' perception of whether a brand is gaining or losing market position against its competitors.

The **"Post-Super Bowl" column** compares data from pre-Super Bowl (Jan 30-Feb 12) to post-Super Bowl (Feb 13-14). This captures the lift advertising brands experienced after the Big Game. The **"Pre + Post-Super Bowl" column** compares responses from early-to-mid January (Jan 1 – 22) to the official 'kickoff' of Super Bowl season and beyond (Jan 23 – Feb 14). These new data points capture the lift that advertisers realized from the pre-Super Bowl hype (e.g., announcing a spokesperson, pre-Super Bowl social media content, release of ads).











POST-SUPER BOWL

Pre: Jan 30-Feb 12 | Post: Feb 13-14

	PRE	POST	GROWTH
 POPCORNERS	7.8	16.2	8.4
 DOORDASH	26.3	34.6	8.4
 NFL	27.9	35.1	7.3
 NETFLIX	38.2	43.2	5.0
 peacock	27.5	31.3	3.8
 amazon	54.4	58.1	3.7
 pepsi	29.4	32.6	3.3
He Gets Us.	4.9	7.9	3.0
 Michelob ULTRA	12.7	15.7	2.9
 Paramount Pictures	32.2	34.9	2.7

PRE + POST-SUPER BOWL

Pre: Jan 1-22 | Post: Jan 23-Feb 14

	PRE	POST	GROWTH
 Coors LIGHT	6.1	16.8	10.7
 NFL	27.5	31.9	4.3
 FANDUEL	14.2	18.4	4.2
 amazon	52.6	56.2	3.6
 peacock	25.8	29.3	3.5
 SQUARESPACE	8.2	11.5	3.3
 The Farmer's Dog	8.9	12.1	3.2
 Rakuten	16.3	19.1	2.8
 Uber	27.1	29.7	2.6
 PRINGLES	26.5	28.8	2.4













CONSIDERATION

This index uses Harris Brand Platform data to rank the top 10 advertisers with the **greatest increases in consideration**, which quantifies consumers' likelihood to purchase a product or service.

The **"Post-Super Bowl" column** compares data from pre-Super Bowl (Jan 30-Feb 12) to post-Super Bowl (Feb 13-14). This captures the lift advertising brands experienced after the Big Game. The **"Pre + Post-Super Bowl" column** compares responses from early-to-mid January (Jan 1 – 22) to the official 'kickoff' of Super Bowl season and beyond (Jan 23 – Feb 14). These new data points capture the lift that advertisers realized from the pre-Super Bowl hype (e.g., announcing a spokesperson, pre-Super Bowl social media content, release of ads).











POST-SUPER BOWL

Pre: Jan 30-Feb 12 | Post: Feb 13-14

	PRE	POST	GROWTH
	53.1	61.6	8.4
	59.2	66.3	7.2
	42.7	49.2	6.5
	77.4	83.3	5.9
	66.8	71.2	4.3
	76.1	79.7	3.6
	88.5	92.0	3.5
	20.5	23.9	3.4
	25.3	28.5	3.2
	50.1	53.1	2.9

PRE + POST-SUPER BOWL

Pre: Jan 1-22 | Post: Jan 23-Feb 14

	PRE	POST	GROWTH
	54.2	61.3	7.1
	44.1	51.1	7.0
	55.3	61.3	6.0
	14.0	19.9	6.0
	47.0	52.6	5.6
	78.9	83.4	4.5
	18.7	23.0	4.3
	27.9	31.9	4.0
	41.4	44.3	2.9
	24.4	27.2	2.8













QUALITY

This index uses Harris Brand Platform data to rank the top 10 advertisers with the **greatest increases in quality**, which signals how consumers perceive the quality of a particular brand's product or service compared to the quality of their competitors' offerings.

The **"Post-Super Bowl" column** compares data from pre-Super Bowl (Jan 30-Feb 12) to post-Super Bowl (Feb 13-14). This captures the lift advertising brands experienced after the Big Game. The **"Pre + Post-Super Bowl" column** compares responses from early-to-mid January (Jan 1 – 22) to the official 'kickoff' of Super Bowl season and beyond (Jan 23 – Feb 14). These new data points capture the lift that advertisers realized from the pre-Super Bowl hype (e.g., announcing a spokesperson, pre-Super Bowl social media content, release of ads).











POST-SUPER BOWL

Pre: Jan 30-Feb 12 | Post: Feb 13-14

	PRE	POST	GROWTH
	28.7	38.4	9.6
	13.0	17.8	4.9
	47.0	51.5	4.5
	44.9	49.2	4.2
	52.3	56.4	4.1
	43.9	47.7	3.8
	49.5	52.7	3.1
	55.0	57.5	2.5
	10.8	12.8	2.0
	27.7	29.5	1.8

PRE + POST-SUPER BOWL

Pre: Jan 1-22 | Post: Jan 23-Feb 14

	PRE	POST	GROWTH
	16.6	23.5	6.9
	26.0	32.7	6.7
	25.7	31.6	5.9
	62.0	67.1	5.1
	38.5	42.2	3.7
	48.3	51.4	3.1
	54.2	57.2	3.0
	13.6	16.6	3.0
	10.6	12.5	1.8
	16.6	18.4	1.8









FAMILIARITY

This index uses Harris Brand Platform data to rank the top 10 advertisers with the **greatest increases in familiarity**, or how recognizable a brand is to the general population.

The **“Post-Super Bowl” column** compares data from pre-Super Bowl (Jan 30-Feb 12) to post-Super Bowl (Feb 13-14). This captures the lift advertising brands experienced after the Big Game. The **“Pre + Post-Super Bowl” column** compares responses from early-to-mid January (Jan 1 – 22) to the official ‘kickoff’ of Super Bowl season and beyond (Jan 23 – Feb 14). These new data points capture the lift that advertisers realized from the pre-Super Bowl hype (e.g., announcing a spokesperson, pre-Super Bowl social media content, release of ads).








POST-SUPER BOWL

Pre: Jan 30-Feb 12 | Post: Feb 13-14

	PRE	POST	GROWTH
	57.4	64.0	6.6
He Gets Us .	12.8	19.3	6.6
	56.9	61.2	4.3
 RÉMY MARTIN	37.3	41.5	4.2
	72.0	76.2	4.2
PLANTERS	75.7	79.8	4.1
	39.9	43.6	3.7
<i>Paramount+</i>	66.3	69.9	3.5
	80.5	83.9	3.4
Google	94.3	97.7	3.4

PRE + POST-SUPER BOWL

Pre: Jan 1-22 | Post: Jan 23-Feb 14

	PRE	POST	GROWTH
	27.9	46.3	18.4
	18.7	26.2	7.5
	69.1	75.3	6.2
T Mobile	78.4	84.1	5.7
	66.7	72.2	5.5
Booking.com	54.7	60.0	5.3
 SQUARESPACE	26.9	31.9	5.0
peacock	68.8	73.4	4.6
	53.2	57.5	4.2
	34.7	38.7	4.0

WHAT DID VIEWERS WANT TO SEE FROM SUPER BOWL LVII ADS?



A brand's creative team may re-imagine advertising, but unless the commercial resonates with viewers, it's not going to help the company's bottom line. **Six-in-10 (65%) adults who watched Super Bowl LVII were satisfied with the ads.** Here, we take a look at what US adults had been hoping to see, so next year's advertisers can boost viewers' satisfaction score.

POSITIVE VIBES ONLY

Super Bowl viewers want to be entertained, not to be reminded of the serious side of life. When asked what themes or tones should be featured in Super Bowl LVII ads, **US adults most often responded funny (66%) and lighthearted (45%).** Respondents less often wanted to be taken on an emotional journey – **purpose-driven (32%), heartfelt (31%), nostalgic (29%), or serious (15%).** Next year, viewers **want to see more ads that are funny (60%), unique (49%), lighthearted (43%), and inspirational (43%).**

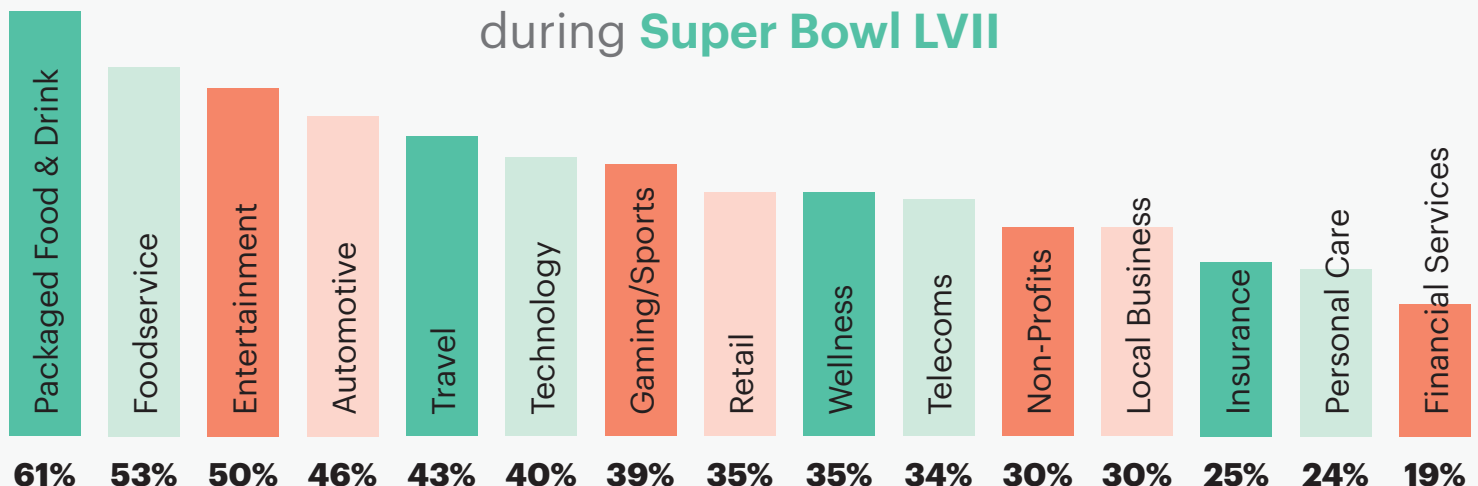
KEEP IT FRESH

US viewers want to **expect the unexpected with original Super Bowl ads.** Six-in-10 (56%) US adults said that they have a **better opinion of brands that air all-new ads during the Super Bowl.** In contrast, less than one-third (26%) of US respondents would have a better opinion of a brand that re-airs an old ad during the Super Bowl. But, brands should feel free to share a sneak-peak of the ad before game day – **79% of US adults would have a better opinion, or maintain the same opinion, of a brand who airs their Super Bowl ad before game day.**

HUNGRY FOR SOME GOOD ADS

US adults have an **appetite for food and drink ads.** Respondents most often said that they think brands from the **packaged food and drink (61%) and foodservice (e.g., restaurants, food delivery apps) (53%) industries should run Super Bowl ads.** After food, US adults were interested in seeing entertainment (50%) and automotive (46%) brands advertise.

Types of Brands that Should Advertise during Super Bowl LVII



Base: US adults (n=1,050). Q51Q6: In your opinion, which of the following types of brands or companies do you think should advertise during the Super Bowl this year (Super Bowl LVII)? Please select all that apply.





BRAND BOWL AD RECALL TRACKER



All advertisers have the same goal: to make their ads memorable. They want jingles that stick in listeners' heads, jokes that people tell their friends, and clips that viewers choose to re-watch on YouTube. The Harris Poll began measuring **Advertising Recall** through Harris Brand Platform in Q3 2022. The platform further tracks consumer ad exposure across 13 unique ad channels, such as television, podcast, streaming, influencer, and social. Here, we take a look at how Super Bowl advertisers' biggest advertisements of the year boosted US adults' ad recall of their brand.











POST-SUPER BOWL

Pre: Jan 30-Feb 12 | Post: Feb 13-14

	PRE	POST	GROWTH
	18%	24%	6%
	22%	26%	5%
	44%	48%	3%
	13%	16%	3%
	22%	25%	3%
	10%	13%	3%
	29%	32%	3%
	22%	25%	3%
	7%	10%	3%
	39%	42%	2%

PRE + POST-SUPER BOWL

Pre: Jan 1-22 | Post: Jan 23-Feb 14

	PRE	POST	GROWTH
	39%	47%	8%
	15%	22%	7%
	14%	20%	6%
	7%	13%	6%
	35%	41%	5%
	18%	23%	5%
	33%	38%	5%
	25%	29%	5%
	43%	47%	4%
	5%	9%	4%



“POST-SUPER BOWL” CHART BIGGEST WINNERS

The “Post-Super Bowl” table highlights brands that saw a big lift in ad recall after Super Bowl Sunday. Looking at this group, the **Pringles (+6%)** spot stuck in viewers’ minds like a Pringles can on a snacker’s hand. Their ad featured high-profile victims, such as Meghan Trainor, who got her hand irreversibly stuck as she went for the last Pringle in the stack.

Meanwhile, **Skechers’ (+5%)** commercial proved just as memorable despite showcasing the complete opposite: the ease at which you can slip in-and-out of their footwear (starring Snoop Dogg and Martha Stewart).

“PRE-AND-POST SUPER BOWL” CHART GREATEST GAINS

The “Pre-and-Post Super Bowl” table showcases brands that were recognized ahead of the big game and maintained their high exposure. Unsurprisingly, **NFL (+8%)** ranks #1 on this list, but **Coors Light (+7%)** is not far behind. There was a lot of pre-game chatter about **Molson-Coors** entering the advertising spotlight, and debate as to whether their ad would feature Miller Lite or Coors Light (spoiler: both + a late addition from Blue Moon).

Dunkin’ (+5%) comes in at #5 among “Pre + Post” Recall winners, as news of Ben Affleck’s involvement quickly spread from mid-to-late January and the brand sustained the lift past the big game.

SO NICE, THEY SHOWED UP TWICE!

Last but not least, **The Farmer’s Dog, Rakuten**, and **M&M’s** joined the **NFL** as brands that shone on both ad recall lists. Rakuten tapped into our nostalgia via Alicia Silverstone’s Clueless character, Cher, while The Farmer’s Dog tugged on our heartstrings. Despite low national familiarity, The Farmer’s Dog boasts a doggone good Ad Recall score.

PLEASE WELCOME THE NEWEST BATCH OF SUPER BOWL ADVERTISERS



Running a national Super Bowl ad is a big risk for any brand, but the stakes only get higher for new advertisers. Each year, emerging brands dip their toes into the Super Bowl advertising pool, hoping that their finance departments will not be disappointed by the results. With no baseline return on investment, these brands hope that their marketing gamble will pay off.

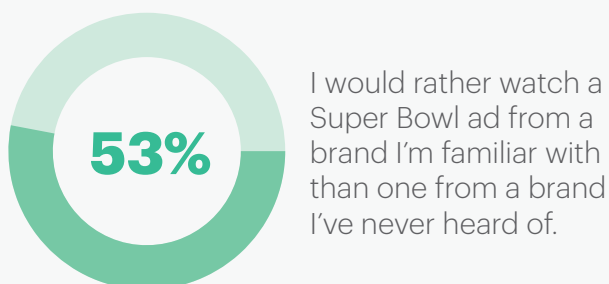
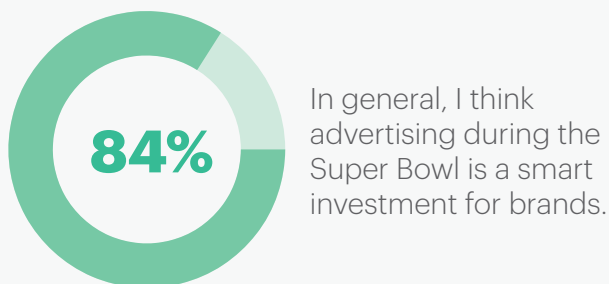
Super Bowl LVII saw 16 new brands enter the national advertising arena.

Nine-in-10 US adults (87%) see the Super Bowl as a great way for up-and-coming brands to get discovered by consumers. Anyone else remember the barrage of crypto ads during last year's game? Airing an ad can lend credibility to a largely unknown industry or brand. **Half (55%) of US adults agree that they trust up-and-coming brands more if they participate in major events like the Super Bowl** (e.g., as a sponsor, advertiser).

In some ways, Super Bowl ads seem like a no-brainer. This year, **113 million viewers tuned into the Super Bowl**, and a portion of this audience was more excited for the commercials than for the football. Most consumers agree - **84% of US adults think advertising during the Super Bowl is generally a smart investment for brands.** However, the potential reward comes at great financial risk.

A good number of viewers are open to learning about new brands during the Big Game, but not everyone. **Half (53%) of US adults would rather watch a Super Bowl ad from a brand they are familiar with than a commercial from a brand they've never heard of.**

Percentage of **US adults** who **agree with the following statements** about **Super Bowl advertising...**





Astellas brought attention to pesky menopause symptoms after the coin flip. Actress Carmella Riley asked women about VMS – aka hot flashes and night sweats. The ad launched ahead of Astellas' new drug fezolinetant, a medication that ameliorates VMS symptoms. Astellas experienced a **+1.3 increase in momentum** ahead of their drug launch. But they weren't the only pharma ad this year. **Dexcom** returned to the Super Bowl with Nick Jonas to showcase their G7 continuous glucose monitoring system (approved by the FDA late last year). Dexcom likewise experienced gains ahead of their product release, with a **+1.1 boost in familiarity with the brand**.

Danny McBride rechristened himself Downy McBride in a commercial for **Downy Unstopables**, but only after the product passed a rigorous multi-week sniff test. McBride tore through a neighborhood in a golf cart, passing out Downy Unstopables and evangelizing the staying power of the product's fresh scent. It turns out that "Downy McBride" is a memorable ally, **as Downy saw a +3% increase in ad recall** after the game.

Ben Affleck starred in **Dunkin's** debut ad, serving up smiles and excitement for the beloved donut chain's unsuspecting drive-thru customers. Affleck is known for his love of Dunkin' and has often been photographed with their products. His wife, Jennifer Lopez, also made an appearance at the drive-thru window to close out the commercial. Affleck's ad spot boosted consumer perception of the Dunkin' brand - they **experienced a +3.1 boost in perceived quality** and a **+1.0 gain in momentum**.

Stars of hit show "Breaking Bad" reunited to endorse Frito-Lay's addictive air-popped snack **PopCorners**. With the help of Walter White, Jesse Pinkman, and Tuco Salamanca, PopCorners raised awareness for the recent release of their seventh flavor – Cinnamon Crunch. PopCorners saw a **+3.8 boost in brand equity** after the Big Game, and a significant **+8.4 leap in momentum**. Americans clearly think this snack is going places.

Premium dog food company, **The Farmer's Dog**, pulled on viewers' heartstrings as we watched a young girl and her pup grow up together. Eventually, the girl marries and has a baby of her own, and the commercial closes with the new mom and her greying dog curled up together. This tender story stuck in viewers' minds, as the brand experienced a **+3.0% increase in ad recall** after Super Bowl Sunday.

It's not often that religion mixes with athletics. This year, **The Servant Christian Foundation** purchased 90-seconds of airtime for their **"He Gets Us" campaign**, a rebranding campaign for Jesus. **Three-quarters (75%) of US adults agree that airing an ad during the Super Bowl is a good way for non-profit organizations** (e.g., religious groups, charities) **to share information about their mission or cause**. Their \$20 million spend on air time paid off with brand equity gains. The Servant Christian Foundation saw a **+3.3 bump in overall brand equity after the game**, **+6.6 in familiarity** for this largely unknown brand and **+2.2 in consideration**.

Workday poked fun at the corporate habit of calling high-performing employees "rockstars" by bringing real rockstars – including Ozzy Osbourne, Joan Jett, and Billy Idol – into the workplace. **Workday gained +1.0% in ad recall** from pre- to post-Super Bowl.

CAUTION - 2023'S SUPER BOWL ADS CONTAIN HIGH ALCOHOL CONTENT



Did you notice a wider array of alcohol brands advertising in this year's Super Bowl? 2023 marked the **first time in over 30 years that AB-InBev** (maker of crowd favorites Budweiser, Bud Light, and Michelob Ultra) **did not own exclusive alcohol advertising rights**. Until now, no other alcohol brands could run national Super Bowl ads.

After AB-InBev announced the end of their alcohol-ad monopoly, other adult beverage powerhouses bought up airtime. **This year's ads showcased Coors Light, Miller Light, Blue Moon, Crown Royal, and Rémy Martin**. But not to worry, AB-InBev fans – AB-InBev ran four national Super Bowl ads this year, promoting **Bud Light, Busch Light, and Michelob Ultra (x2)**.

US adults have a taste for alcohol ads. When asked which industries should advertise in Super Bowl LVII, US adults most often chose packaged food and drink brands (61%). Within this category, consumers **more often responded that they want to see alcohol brands advertise (47%) over non-alcoholic food and beverage brands (43%)**.

However, **non-alcoholic beverages are also having a moment**. Beverage manufacturers are putting more effort than ever before into producing satisfying zero-proof options. Heineken jumped on this trend, advertising **Heineken 0.0, a non-alcoholic version of their popular beer**. They partnered with Marvel, showing Ant Man sip his Heineken 0.0 to remain sharp before saving the world.

All the alcohol advertisers experienced gains after Super Bowl LVII, including:



+3.4 Familiarity
+1.9 Momentum



+4.2 Familiarity
+1.0 Consideration



+1.8 Quality
+0.2 Consideration



+3.0% Television Ad Recall



+4.3 Familiarity
+1.5 Momentum



+4.2 Familiarity
+3.2 Consideration

WHAT'S THE SPREAD? – AMERICANS' CHANGING ATTITUDES TOWARDS SPORTS BETTING



Betting has long been an engrained part of the sports fan experience, but **Super Bowl LVII marked the first time that the Big Game was held in a state with legalized sports betting**. Currently, **36 states and the District of Columbia permit legal sports gambling**. In last year's report, we explored US adults' support for sports gambling. This year, we investigate how public sentiment has shifted over the past 12 months.

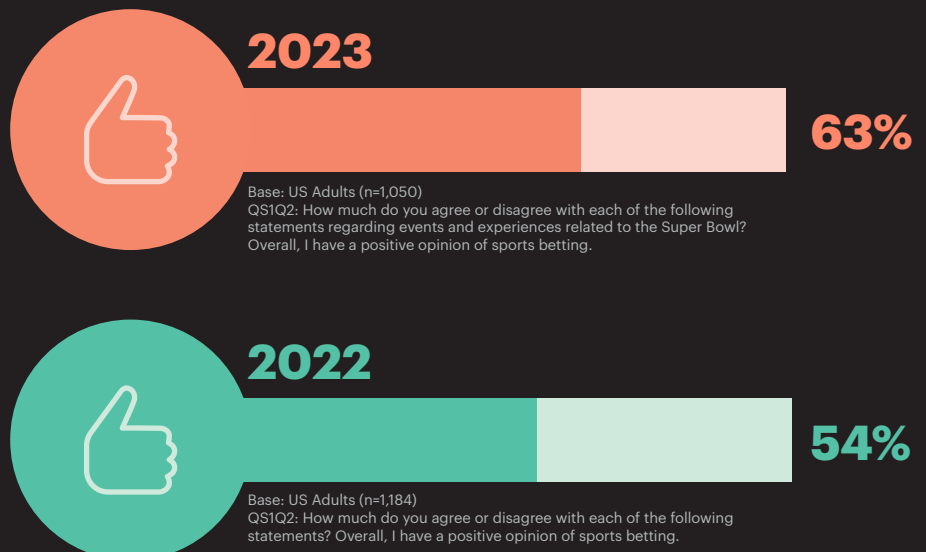
Sports betting enthusiasts and sportsbook brands alike will be happy to hear that **positive sentiment towards legalized sports betting has lifted from 2022**. The American Gaming Association expected about **\$16 billion to be bet on this year's game** in both legal and illegal bets. This more than doubled last year's Super Bowl bets which stood at **\$7.6 billion**.

Last year, little more than half (54%) of US adults agreed that they have a positive opinion of sports betting. This year, we saw a positive swing in sports betting's favor as 63% of US adults agreed that they have a positive opinion of sports betting.

While this is a big win for sports betting, US adults have remained more consistent towards other aspects of this mercurial pastime. This year, we saw a six-percentage point increase in the percent of US adults who agree that **official sports betting should be legal everywhere in the United States (69% this year, versus 63% last year)**.

This year and last, **the same percentage of US adults (66%) agree that sports organizations (e.g., teams, leagues) should not partner with sports betting companies**. This steady stand against these types of partnerships could reflect consumers' concern that gambling/sports partnerships could undermine the integrity of the competition.

Overall, I have a **positive opinion of sports betting.**





This year, **26% of US adults said that they placed a bet** (e.g., using a sportsbook, an unofficial wager with friends) **on the Super Bowl**. This is marginally up from 2022, when 22% of adults admitted to placing a bet on Super Bowl LVI. Of those who placed a bet this year, most used an **online sports betting platform** (e.g., DraftKings, FanDuel) (**58%**), followed by placing an unofficial bet with someone they knew (e.g., friend, acquaintance) (40%), workplace bet (e.g., office pools, score squares) (32%), or a sportsbook bet (e.g., at a casino, racetrack) (28%).

Last year marked the first time that sportsbook brands could run ads during NFL games, and several online sportsbooks (Caesars, DraftKings, and FanDuel) rushed to advertise during Super Bowl LVI. **This year, DraftKings and FanDuel returned with national ad campaigns. This was FanDuel's first national campaign after a regional placement last year.** DraftKings and FanDuel used their ad spots to entice new sign-ups by offering users special free bets ahead of the Super Bowl.

For their commercial, **DraftKings** invited viewers inside comedian Kevin Hart's fictitious Super Bowl party. The ad plugs DraftKings' offered free \$5 in Super Bowl bets for any user in a state where DraftKings operates. Hart is accompanied by several other well-known faces, including NFL star Emmitt Smith, professional wrestler The Undertaker, rapper Ludacris, and pro skateboarder Tony Hawk. DraftKings had a strong showing across the board with a **+2.8 increase in overall brand equity, +3.7 increase in familiarity, +4.9 in perceived quality, and +2.3 in purchase consideration.**

FanDuel challenged the advertising norm by **incorporating sports betting into their live commercial**. They enlisted former football powerhouse Rob Gronkowski (aka Gronk) to kick a 25-yard field goal during the third quarter. While Gronk missed the kick, FanDuel still awarded eligible users a piece of the \$10 million pie to use for future free bets. Their live stunt was memorable - FanDuel **gained a 2% boost in ad recall from pre-to-post Super Bowl.**

But these were not the only two ads that involved sports betting, as **Molson Coors partnered with DraftKings for their ad**. They established a \$500,000 prize fund to distribute to DraftKing users who correctly guessed the details of their **Coors Light/Miller Light/Blue Moon "High Stakes Beer Ad."** Molson Coors launched a number of fun free bets through the DraftKings app, asking about everything from dogs to facial hair. DraftKings' involvement with Molson Coors, in addition to running their own commercial, helps explain their significant brand equity boost this year.

This year's numbers don't lie - sports betting is on the rise, and it does not seem that America's enthusiasm for wagering has peaked. If more states continue to legalize sports gambling, we can expect to see our favorite sportsbook brands advertise in next year's Super Bowl as well. Perhaps Super Bowl LVIII will also break this year's \$16 billion betting record.

HOW ARE OTHER BRAND SPONSORS IMPACTED BY THE BIG GAME?



While the Super Bowl ads take front and center, national advertisers were not the only brands hoping to see a lift after February 12th. Super Bowl sponsors spent millions of dollars to be a part of football's big day. **Three-quarters (75%) of US adults agree that sponsoring the Super Bowl** (i.e., the game, halftime show, or another segment) **is a smart investment for brands.** **Half (49%) of adults (and 66% of Millennials) say that they tend to remember the brands that sponsor the Super Bowl more than brands that advertise during the Super Bowl.**

This year's Super Bowl was held in **State Farm Stadium**, the home of the Arizona Cardinals. This was good news for State Farm since **a quarter of US adults (and 40% of Millennials)** agree that they have a **better opinion of the brand that owns the naming rights to the Super Bowl stadium.** This panned out in brand equity data: State Farm saw a **+5.5 lift in quality** and a **+4.8 lift in consideration.**



Since 1987, the head coach of the Super Bowl's winning team has received a "**Gatorade bath.**" While not an official marketing campaign for the sports drink, these baths have generated more than \$20 million in equivalent advertising value for Gatorade. A third **(30%) of US adults** agree that they have a **better opinion of brands** that are **associated with a Super Bowl tradition**, such as the Gatorade bath.

Fox paid the NFL more than \$2 billion a year for their media deal, which included the **rights to broadcast this year's Super Bowl.** Last year, NBC and their streaming service Peacock hosted the Super Bowl. **Peacock saw a +3.9 increase in familiarity after Super Bowl LVI.** This year, Fox saw a **+2.3 increase in familiarity** and **+5.3 increase in momentum.**



After Pepsi ceded its 10-year reign as halftime show sponsor, **Apple Music** jumped aboard. Apple Music's deal extends for five years and will cost the tech giant approximately \$50 million a year. **More than half (58%) of US adults were satisfied with this year's halftime show.** Apple Music experienced a **+3.3 lift in familiarity** and **+2.5 increase in consideration.**

The brand equity index survey was conducted online within the United States. Pre-game data for “Post-Super Bowl” data was collected from January 30 to February 12, 2023, among 28,485 adults (aged 18 and over), and post-game data was collected from February 13, 2023, to February 14, 2023, among 34,663 adults through Harris Brand Platform. Pre-game data for “Pre-Post Super Bowl” data was collected from January 1 to 22, 2023, among 18,535 adults, and post-game data was collected from January 23 to February 14, 2023, among 69,210 adults through Harris Brand Platform. The data has been weighted across the following demographic variables to align with US Census proportions: age/gender (interlocked), ethnicity, income, education, region, household size, marital status, and employment status. Propensity score weighting was used to adjust for respondents’ propensity to be online.

The Super Bowl consumer sentiment research was conducted by The Harris Poll via four online surveys fielded throughout 2022 and 2023. The first survey was conducted January 28-31, 2022, among 1,127 US adults, ages 18 and older. The second survey was conducted February 14-15, 2022, among 1,184 US adults, ages 18 and older. These surveys are not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated. Figures for age, gender, race and ethnicity, education level, region of residence, and household income were weighted where necessary to align with actual proportions in the population. Propensity score weighting was used to adjust for respondents’ propensity to be online. The third survey was conducted January 13-16, 2023, among 1,050 US adults, ages 18 and older. The fourth survey was conducted February 13-14, 2023, among 1,027 US adults, ages 18 and older. Respondents for these surveys were selected from a pool of potential respondents who have agreed to participate in The Harris Poll’s online research. Sample data is accurate to within +/- 4.0 percentage points using a 95% confidence level. Figures for age, gender, race and ethnicity, education level, region of residence, and household income were weighted where necessary to align with actual proportions in the population. Propensity score weighting was used to adjust for respondents’ propensity to be online.

ABOUT US

The Harris Poll is one of the longest-running surveys in the U.S., tracking public opinion, motivations and social sentiment since 1963. It is now part of Harris Insights & Analytics, a global consulting and market research firm that strives to reveal the authentic values of modern society to inspire leaders to create a better tomorrow. We work with clients in three primary areas; building twenty-first century corporate reputation, crafting brand strategy and performance tracking, and earning organic media through public relations research. Our mission is to provide insights and advisory to help leaders make the best decisions possible.

WANT TO LEARN MORE?

[Harris Brand Platform’s](#) research team is available to present custom and more detailed data about your brand. Please [email Zeke Hughes](#), to set-up a meeting.



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