



Ipsos-ASI
The Advertising Research Company



Super Bowl and Super Ads ... Was it Worth it?

Super Bowl XXXVIII

February 1, 2004

Summary of Findings

- **Overall it seems like the Super Bowl is an increasingly important event for advertisers. More people watched the commercials this year than in past Super Bowls or other games.**
 - **During this year's Super Bowl XXXVIII 46% claimed to have watched all of the commercials compared to just 37% during Super Bowl XXXVII.**
- **89% could remember without prompting the name of at least one of the advertisers in the Super Bowl**
 - **only 46% could remember an ad from the Sugar Bowl, and 43% from the NFC Championship game.**
- **The average viewer could remember unaided 3.5 advertisers in the Super Bowl, the same as last year, compared to only one advertiser for the Sugar Bowl and NFC Championship games.**

Summary of Findings

- **Once again Budweiser and Pepsi were the top 2 most remembered advertisers, not surprising based on their significant level of spending behind the Super Bowl.**
- **There was a greater presence of Automotive advertising with six different advertisers. Cadillac, Chevrolet and Ford were among the most remembered.**
- **"One ad wonders" (advertisers who only aired one ad during the Super Bowl) included Lays, 7-Up, FedEx and IBM who are among the most memorable.**
- **New entrants into Super Bowl advertising included new DTC brands in the Erectile Dysfunctional category, with advertising for Levitra and Cialis.**



Summary of Findings

- ***“Successful, effective advertising is memorable advertising – not necessarily the most popular, funniest, expensive or most hyped – and many of this year’s Super Bowl advertisers delivered with high recall scores.”***
 - David Brandt, Executive Vice President

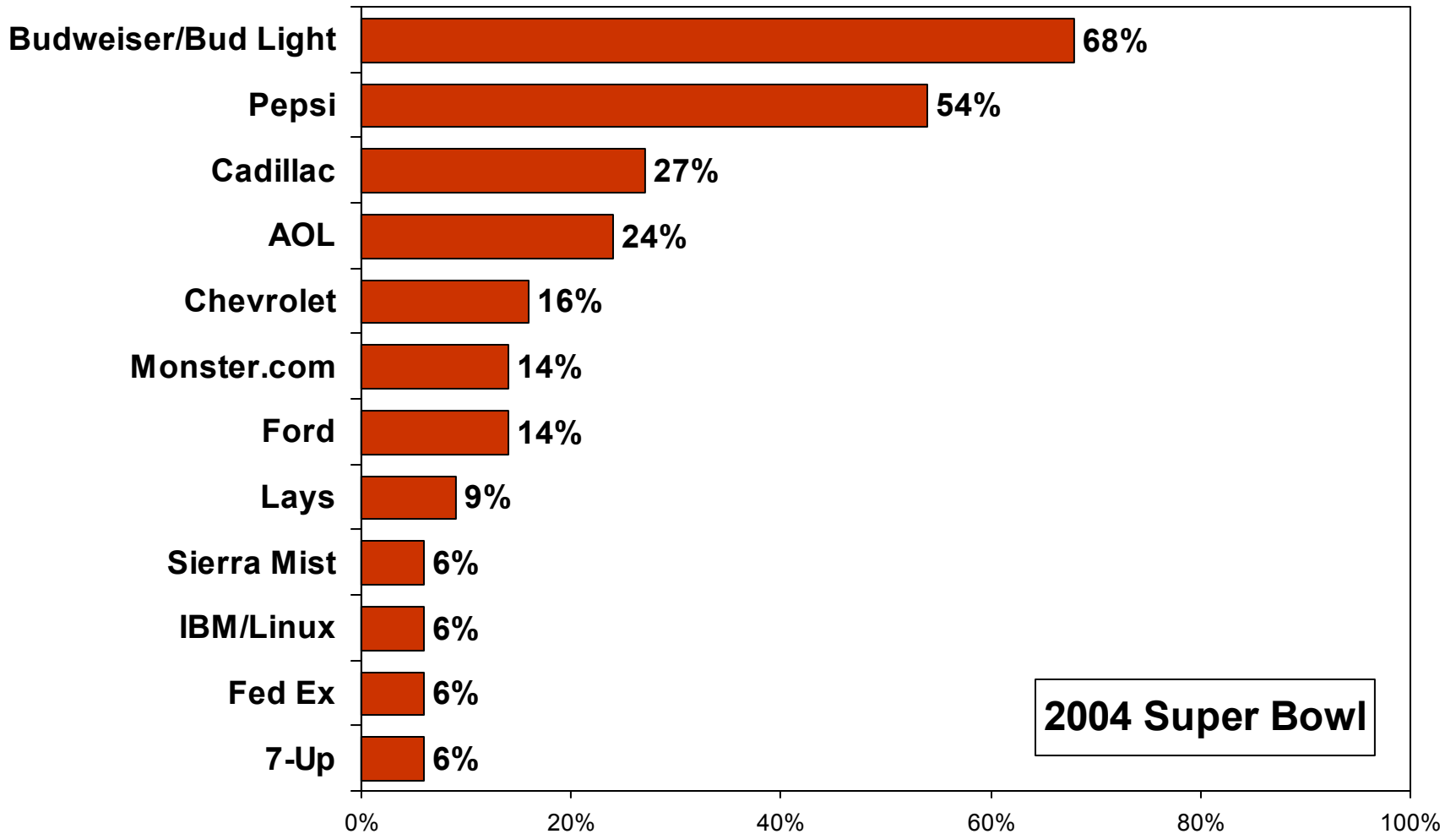


Number of Advertisers Remembered

- **Consistent with last years Super Bowl, respondents remembered an average of 3.5 ads and 89% of respondents could name at least one ad.**

| | <u>Sugar Bowl</u> % | <u>NFC</u> <u>Championship</u> % | <u>2003</u> <u>Super Bowl</u> % | <u>2004</u> <u>Super Bowl</u> % |
|---|------------------------|--|---------------------------------------|---------------------------------------|
| Average Number of Ads Played Back | 1.09 | 1.11 | 3.52 | 3.55 |
| Number of Respondents who Could Name One or More Ad | 46% | 43% | 87% | 89% |

Most Remembered Advertisers





Prior Knowledge of Super Bowl Ads

Did you see/hear/read information prior to the Super Bowl?

- **Once again this year, advance Super Bowl advertising hype did not strengthen ad recall.**

| % of Respondents who Claimed to see/hear/read information prior to the Super Bowl | <u>2003</u> | <u>2004</u> |
|---|------------------------|------------------------|
| | <u>Super Bowl</u> % | <u>Super Bowl</u> % |
| Yes (had prior knowledge) | 39 | 39 |
| Had prior knowledge and identified an ad | 75 | 74 |
| Total sample who identified an ad | 87 | 89 |



Commercial Attention

For commercials during the <period>, did you watch...?

- **More people watched all of the commercials in this year's Super Bowl than last year, and significantly more than the other major football games.**
 - 51% claimed to have watched all the ads during the Super Bowl halftime show ... up from 48% in 2003. By comparison, only 18% watched all the ads during halftime of the Sugar Bowl, and 15% for the NFC Championship game (see next slide).

| % of Respondents who Claimed to Watch <u>ALL</u> Commercials in the entire game | <u>Sugar Bowl</u> | <u>NFC Championship</u> | <u>2003 Super Bowl</u> | <u>2004 Super Bowl</u> |
|---|-------------------|-------------------------|------------------------|------------------------|
| | % | % | % | % |
| Entire game (including halftime) | 12 | 9 | 37 | 46 |



Commercial Attention

For commercials during the <period>, did you watch...?

- **More than 50% of people watching the Super Bowl also watched all of the commercials within each quarter.**

% of Respondents who Claimed to Watch ALL Commercials in the period

| | <u>Sugar Bowl</u> % | <u>NFC Championship</u> % | <u>2003 Super Bowl</u> % | <u>2004 Super Bowl</u> % |
|----------------|------------------------|------------------------------|-----------------------------|-----------------------------|
| Pre-Game show | NA | NA | 37 | 46 |
| First Quarter | 14 | 12 | 55 | 58 |
| Second Quarter | 12 | 12 | 54 | 57 |
| Halftime | 18 | 15 | 48 | 51 |
| Third Quarter | 14 | 13 | 49 | 53 |
| Fourth Quarter | 21 | 16 | 48 | 52 |
| Post-Game show | NA | NA | 24 | 32 |



Viewing Behavior

How often have you watched/attended NFL Games this season?

- **Not surprising, the Super Bowl not only attracts football enthusiasts, but also those less likely to watch a football game.**

| | <u>Sugar Bowl</u> % | <u>NFC</u> <u>Championship</u> % | <u>2003</u> <u>Super Bowl</u> % | <u>2004</u> <u>Super Bowl</u> % |
|---------------------------------------|------------------------|--|---------------------------------------|---------------------------------------|
| Fanatics (Every/Almost Every Week) | 80 | 82 | 71 | 63 |
| Moderate (Sometimes/ Occasionally) | 19 | 18 | 29 | 37 |



Viewing Behavior

Where did you watch the game?

- While most people watch the Super Bowl, Sugar Bowl and AFC Championship games from home, the Super Bowl is twice as likely to be viewed from someone else's home compared to the other games.

| | <u>Sugar Bowl</u> % | <u>NFC</u> <u>Championship</u> % | <u>2003</u> <u>Super Bowl</u> % | <u>2004</u> <u>Super Bowl</u> % |
|--|------------------------|--|---------------------------------------|---------------------------------------|
| In Your Home | 90 | 83 | 74 | 75 |
| In Someone Else's Home | 8 | 10 | 24 | 22 |
| In a Public Location (Club, Bar, Airport, etc.) | 5 | 9 | 5 | 7 |



Viewing Behavior

How many other people watched the game with you?

- **Most people watched the Super Bowl with about 6 other people.**

| | <u>Sugar Bowl</u> % | <u>NFC</u> <u>Championship</u> % | <u>2003</u> <u>Super Bowl</u> % | <u>2004</u> <u>Super Bowl</u> % |
|---|------------------------|--|---------------------------------------|---------------------------------------|
| None | 24 | 28 | 14 | 12 |
| One | 29 | 26 | 22 | 24 |
| 2 or More | 28 | 44 | 61 | 60 |
| Mean number of other people watching with you | 2.86 | 4.44 | 5.61 | 5.76 |



Methodology

- **Ipsos-ASI has been conducting post-game polls for the past three years that compare advertisement recall among men watching the Super Bowl, with advertisement recall among men watching other key football games.**
- **For this study, Ipsos-ASI conducted interviews via the internet with adult males, age 21-60, after each game.**
- **A total of 885 males were interviewed in three waves:**
 - **Sugar Bowl: January 4, 2004 (NCAA BCS National Championship)**
 - **NFC Championship Game: January 18, 2004**
 - **Super Bowl: February 1, 2004**



About Ipsos-ASI

- **Ipsos-ASI is the premier global provider of advertising research solutions for advertisers around the world.**
- **Offices in 14 countries with revenues nearing \$100 million**
- **Member of the Ipsos group of companies, the second largest survey-based market research firm in the world**
- **For more information, please email us at info@ipsos-asi.com**