

KANTAR

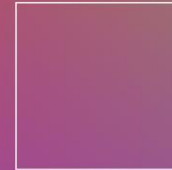


Super Bowl LIX

Creative Trends and Top Performers

Full Report

February 11, 2025



The Super Bowl as pulse check

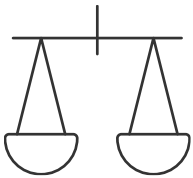


Super Bowl commercials are in many ways **a reflection of the American economy...** It's also an indicator of what has become mainstream (or at least what wants to become mainstream).

– The Hollywood Reporter



Cultural themes shaping Super Bowl LIX



The Status Quo Must Go

“We are living through a transitional decade, unlike any decade since the post-WW2 turning point from the mid-60’s to the mid-70’s.”

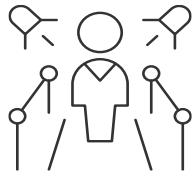
J. Walker Smith, Kantar



Harnessing the AI Hype

65% of consumers believe “AI doesn’t affect my day-to-day life”

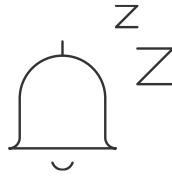
There remains uncertainty around the role it will play on society.



Celebrity Overload?

ROI	w/o Celebs	w/Celebs
2023	\$5.3M	5.1M
2024	9.4M	6.7M

For the second year in a row, ads without celebrities had higher ROIs than ads with celebrities.



America Needs a Break

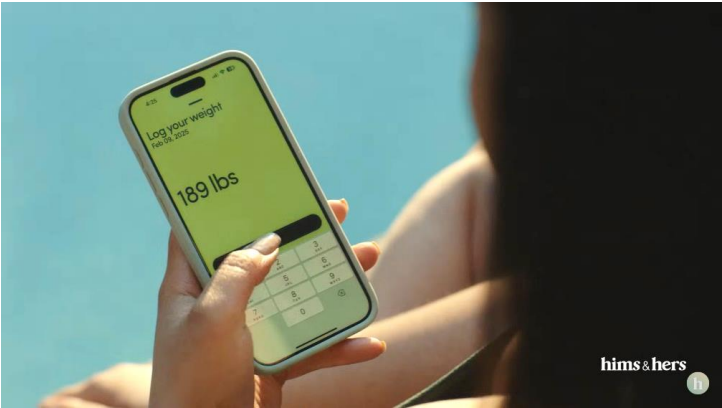
81% of Americans feel “It’s hard to make sense of the world these days”

#1 The Status Quo Must Go

Hims & Hers “Sick of the System” boldly goes after the \$160B weight loss industry by fueling consumers’ distrust towards institutions, but creates controversy

“ Ad sparks controversy.
NYT, 2.7.25

“ Risks misleading patients.
US Senators Richard Durbin,
Roger Marshall to the FDA



Hims & Hers “This is America”

Impact	74
Power	60
Enjoyment	81



#1 The Status Quo Must Go

Another healthcare brand, Pfizer evolved their strategy from 2024, acting like an advocate vs. an institution. And it worked.



Pfizer “Knock Out”

Impact	66
Power	79
Enjoyment	81



Pfizer “Here’s to Science” 2024 SB ad

Impact	57
Power	26
Enjoyment	14



#1 The Status Quo Must Go

There were only two auto ads this year, both message on EV, but as a choice, not as the car of the future.



Ram “Goldilocks & the Three Trucks”

Impact	85
Power	91
Enjoyment	95



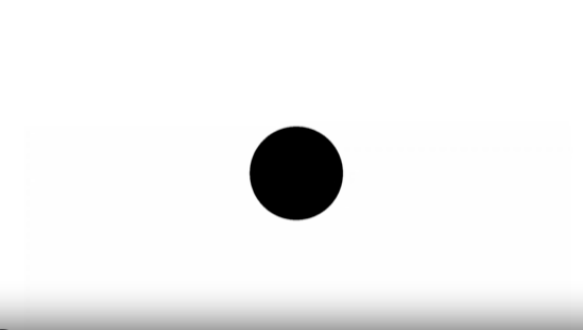
Jeep “Owners Manual”

Impact	66
Power	75
Enjoyment	92



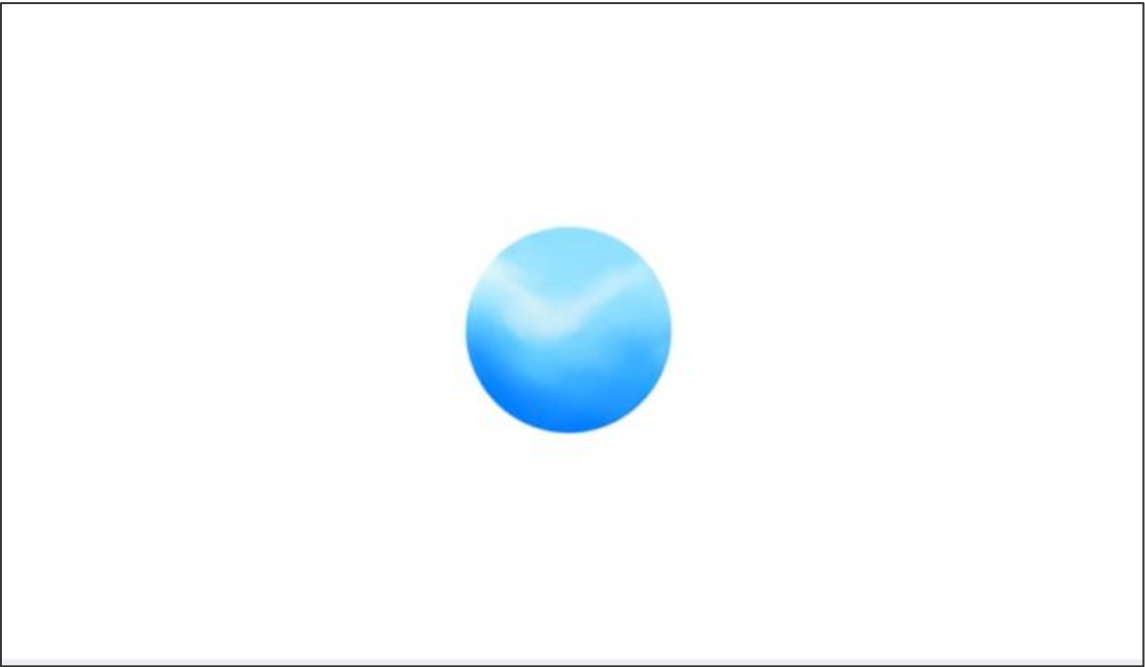
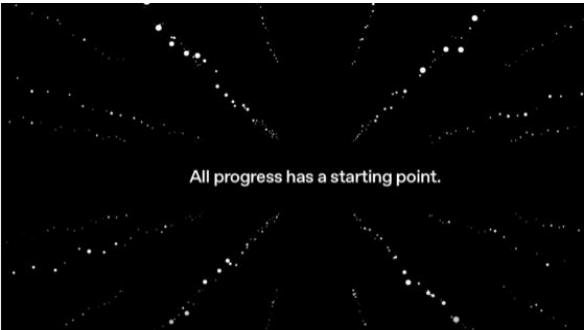
#2 Harnessing the AI Hype | AI as the Next Tech Evolution

ChatGPT smartly positioned itself as a leader of our collective technological evolution, ushering in the next wave of progress by comparing to big leaps like the moon landing and the invention of the internet



ChatGPT “The Intelligence Age”

Impact	57
Power	73
Enjoyment	84



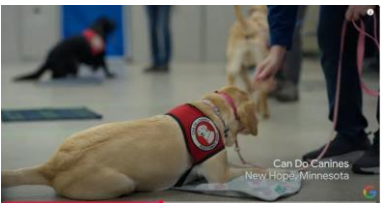
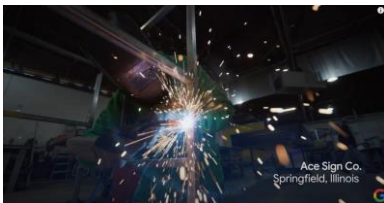
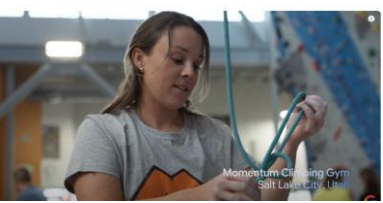
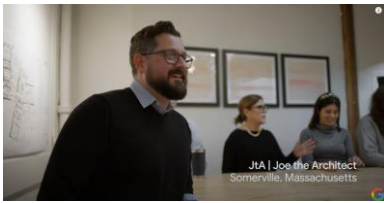
#2 Harnessing the AI Hype | AI as an Everyday Tool for People

Google Gemini acts as an advocate and shows us practical use cases for AI tools with a combined strategy of universal appeal and hyper local relatability



Google Gemini “Dream Job”

Impact	45
Power	70
Enjoyment	86



Google’s AI-generated campaign was boldly launched in local markets didn’t execute flawlessly (Wisconsin’s ad had incorrect facts stated) but shows how AI can help SMB owners run their businesses more efficiently

Super Bowl LIX: Creative Trends and Top Performers

#2 Harnessing the AI Hype | AI to Help Develop Super Bowl Ads

Mountain Dew and Tubi take a different strategy. Use of AI in creative production sparks conversations and arguments across the trades, but do consumers care about special effects?



Mountain Dew “Kiss from a Lime”

Impact	83
Power	69
Enjoyment	88



Tubi “Born to Love Westerns :60”

Impact	52
Power	64
Enjoyment	90



Are there any celebrities that **didn't** have a part in the Super Bowl this year?



#3 Celebrity Overload

Have we reached peak celebrity saturation?

👏 It feels like McConaughey is a fulltime **commercial actor** now

Conflicting and Saturated

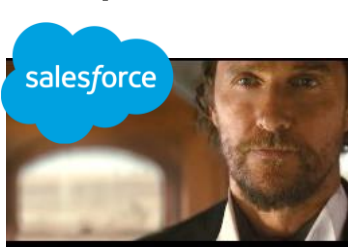
Kris Jenner
2024



2025



Matthew McConaughey
2022-present



2025



Celebrities with multiple side gigs

- | | |
|--------------------|-----------------------|
| — Andy Reid | — Martha Stewart |
| — Snoop Dogg | — Tom Brady |
| — Manning Brothers | — Matthew McConaughey |
| — Nick Offerman | — Patrick Mahomes |

The celebrity-filled nature of the Super Bowl dulled the attention-grabbing strategy of celebrity partnerships this year


#4 America Needs a Break

Humor is the break. There are many avenues to effectively get that LOL or chuckle that advertisers deployed in Super Bow LIX.


**Relatable**
Coors Light Case of the Mondays


	Impact	71
	Power	64
	Enjoyment	89


**Can't help but LOL**

	Impact	88
	Power	85
	Enjoyment	87


**Clever**
Ritz Salty Club


	Impact	80
	Power	83
	Enjoyment	88


**Shock Value**
Hellmann's When Harry & Sally Met Hellmann's

	Impact	74
	Power	81
	Enjoyment	91

**Childish**
Totino's Chazmo Goes Home

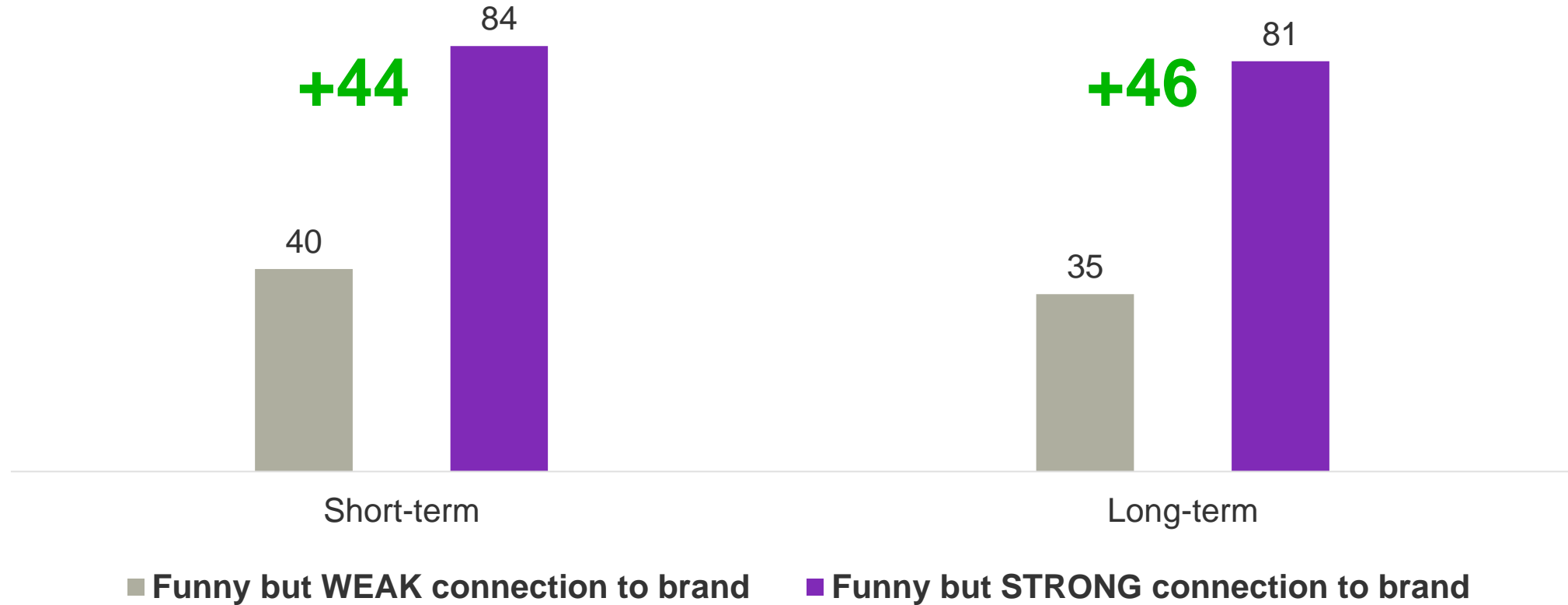
	Impact	80
	Power	76
	Enjoyment	85

**Absurdity / Stunt**
Mountain Dew Kiss from a Lime

	Impact	83
	Power	69
	Enjoyment	88

#4 America Needs a Break

Brands that find their sense of humor, not borrow it, perform better



Source: Kantar LINK Database, STSL and Demand Power Contribution (average percentile)

#4 America Needs a Break

Funny ads work for a reason, why not use humor outside of the Super Bowl?

Humor creates engagement with the ad



Engagement drives Attention

Campaigns are
7x
more impactful
among more receptive audiences

The ad creates a brand memory

Short-term sales lift



Long-term brand equity

Source: Kantar Creative Effectiveness 2024

Super Bowl LIX Standouts

Female athletes and women’s health stood out in ads that put the message first.

Nike “So. Win.”



Impact	55
Power	62
Enjoyment	81

NFL “Flag 50”



Impact	48
Power	62
Enjoyment	78

Novartis “Your Attention Please”



Impact	62
Power	80
Enjoyment	88

LINK AI evaluated all of the national TV ads in **Super Bowl LIX**, and your Top 10 are...



2025 | Top 10 Performers

Based on a combination of Power, Enjoyment, and Impact

Ram “Goldilocks & the Three Trucks”



Impact	85
Power	91
Enjoyment	95

Coffee Mate “Foam Diva”



Impact	83
Power	87
Enjoyment	91

Reese’s “Don’t Eat Lava”



Impact	88
Power	85
Enjoyment	87

Booking.com “Ridiculously Right”



Impact	87
Power	85
Enjoyment	88

Dunkin’ “DunKings2”



Impact	88
Power	85
Enjoyment	87

Nerds “Wonderful World”



Impact	89
Power	81
Enjoyment	88

Little Caesar’s “Woah!”



Impact	85
Power	84
Enjoyment	88

Ritz “Salty Club”



Impact	80
Power	83
Enjoyment	88

Bosch “The More You Bosch”



Impact	86
Power	84
Enjoyment	81

Hims & Hers “This is America”



Impact	77
Power	88
Enjoyment	86

2025 | Bottom 10 Performers

Based on a combination of Power, Enjoyment, and Impact

Rocket “Own the Dream”



Impact	30
Power	38
Enjoyment	86

T-Mobile “A New Era in Connectivity”



Impact	55
Power	42
Enjoyment	58

NerdWallet “Genius Beluga”



Impact	45
Power	39
Enjoyment	75

Skechers “Side Hustle”



Impact	57
Power	58
Enjoyment	63

TurboTax “Now Taxes is So Sweet”



Impact	52
Power	48
Enjoyment	80

WeatherTech “Born to be Wild”



Impact	51
Power	62
Enjoyment	71

Tubi “Born to Love Westerns :15”



Impact	47
Power	61
Enjoyment	83

FanDuel “The Dream”



Impact	65
Power	64
Enjoyment	68

NFL “Somebody”



Impact	43
Power	67
Enjoyment	87

Squarespace “Tale as Old as Websites”



Impact	52
Power	67
Enjoyment	85

What did we **learn** from
Super Bowl LIX?



Key Creative Trends from Super Bowl LIX

Brands have used humor, celebrities and nostalgia to be more effective this year, but the playbook might be starting to get stale.

While this is our most effective set of ads yet, will we see more distinction in 2026?

America needs a break, and humorous ads deliver this year. Overall, we're seeing more brands show they have a sense of humor (rather than borrowing one).

Campaigns perform well when they build on a humorous human truth that we find funny no matter what channel the ads live on.

Celebrity Overload. With so many brands using multiple celebrities in ads, the value of using one becomes diluted. Celebrities are effective when they play a key role in the storyline v. simply make an appearance and are consistent with brand values.

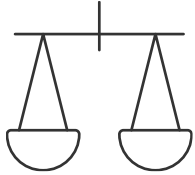
Nostalgia or shared memories work, especially when done in a fresh, modern way.

Brand as advocate v. institution

Brands in categories such as pharma, tech and financial services are creating more personal ways to connect with their audiences, reflecting the tone of the times.

In a world where trust for institutions continues to erode, brands that don't act like one perform better.

What will shape content in 2025?



The Status Quo Must Go

- When pharma ads **shift to consumer advocacy and a “same team” mentality**, they work harder
- Institutional brands that **act more like an advocate** (in authentic ways) have an opportunity to resonate among a society with low trust for institutions now
- EV becomes a gentle nudge versus a shove, **emphasizing consumers’ choice**
- Brands with **a point of view** stand out and earn attention post-game, especially amid transitional times when many brands are becoming risk-averse

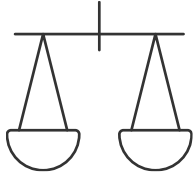


Harnessing the AI Hype

- As Google Gemini advocates, **AI can be humanized**: showing us how it works to **help consumers** on a daily basis is effective
- ChatGPT has positioned itself as a leader in the next phase of our collective technology evolution. Brands should take note and **find their own niche**
- AI as **a tool for special effects** is bringing storylines to life in new and unexpected ways.



What will shape content in 2025?



Celebrity with Purpose in the Storyline

- Ads that integrate celebrities into **brand-centric narratives** are more effective
- Advertisers should rely more on the **strength of their creative ideas** vs. celebrities to grab attention.
- Celebrity choices hold a mirror to a collective decrease in DEI in casting choices and waning prioritization of these values



America Needs a Break

- Brands delivered **on consumers' desires to be entertained** amid the barrage of the recent news cycle. Most ads were highly enjoyable
- **Humor is still one of the easiest ways to entertain**, and there are many ways to do it effectively. Advertisers should feel more comfortable using humor in any campaign as it is proven to drive engagement and deliver short and long-term results



2024 U.S. Monitor

Methodology

We've used three sources of data to inform our analysis this year

LINK AI

Artificial intelligence is revolutionizing advertising creative production by providing the ability to generate a range of different concepts and ad variations quickly and efficiently. Content measurement should keep up.

For the fifth year in a row, we used LINK AI, now with Active Attention and Celebrity Recognition built in, to analyze ads as they launched. We analyzed the ads and the data to identify creative strategies that helped brands get the highest MROI on their Super Bowl ad investment

LINK qualitative

- We interviewed a diverse group of consumers using Kantar's Illumineers approach.
- Consumers shared their reactions to pre-Super Bowl ads through text and video uploads, capturing their responses to humor and cultural relevance.
- Responses were compiled on a state-of-the-art platform featuring advanced GenAI analysis capabilities, along with human interpretations.

NeedScope

- We utilized Kantar's NeedScope model on humor, which segments humor into six core need states.
- This analytic lens allowed us to gain a deeper understanding of perceptions related to humor on a social and emotional level.

Questions?

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