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THE UNIFIED NFL TV & VIDEO AD PLAYBOOK

Creative, Audience & Outcome Trends

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NFL Advertising Is Built to Score for TV

The NFL dominates TV in a way that no other programming can match.

In 2024, the league delivered 3.28% of all household TV ad impressions (No. 1 among all programming). And during the 2024-25 regular season and playoffs, the NFL accounted for 23.22% of all impressions across ABC, CBS, Fox and NBC—**more than 2x the next-best program**.

Across the Big 4 broadcast networks, NFL games accounted for over 11K ad minutes, nearly $6.76 billion in est. national linear TV ad spend, and close to 30K ad airings. There's nothing quite like it. And as TV's most important property, it's also the one that requires the most precision when it comes to accurately measuring creative and audience, in order to properly evaluate TV ad outcomes.

In this new report, we share key insights on what's winning for NFL sponsor ads, how appearing during games drives purchase outcomes for industries like chips and delivery services, and where brands can find avid NFL viewers in the offseason (and at a lower cost, too).

Discover all of that and more in iSpot's unified football-focused report. And get in touch if you want more analysis around the NFL season.

3.28% NFL's share of all TV ad impressions in 2024

23.22% NFL's share of Big 4 TV ad reach during the 2024-25 season

$6.76B Est. national linear TV ad spend during NFL games on Big 4 networks last season

11,021 NFL ad minutes across Big 4 networks last season

Advertise Smarter With iSpot

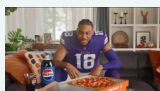iSpot

Creatives That Consumers Couldn't Ignore

Top NFL Sponsor Ads by Likeability

The most likeable NFL sponsor ads outperformed the NFL sponsor ad norm by double-digit percentages.

Brand	Spot	% More Likeable Than New NFL Sponsor Ad Norm
Little Caesars	A Piece Of Me	+21%
TACO BELL	In-Home Taco Bell	+20%
PRINGLES	The Call of the Mustaches	+19%
VISA	Every Step Forward	+19%
DICK'S SPORTING GOODS	A Watt Holiday Classic	+17%

Top NFL Sponsor Ads by Positive Purchase Intent

The top NFL sponsor ads ranked by increased purchase intent ("much more" or "more " likely to purchase after viewing) were food-focused.
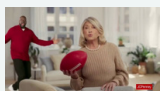
Brand	Spot	Share of Viewers With Positive Purchase Intent
Little Caesars	A Piece Of Me	75%
Domino's	Emergency Pizza	73%
TACO BELL	In-Home Taco Bell	70%
JCPenney	All About The Deals	68%
KING'S HAWAIIAN	Snack Stand	67%

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Click ad images to watch each spot.

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Every Second Is a Game-Changer for Ads

Viewers Leave Blowouts (and Late-Game Ads) Behind

Game competitiveness is crucial when assessing audience delivery, no matter how big the stage is.

Take this primetime game from the last two seasons as one of many examples: 18 different brands only ran ads from pod 14 through the final whistle. That's a whopping 36% of all game advertisers. The ads that appeared during those pods fell dramatically short of the game's Average Commercial Minute Audience, by an aggregate 209 million impressions.

Audience Flow: Viewers Tend to Flee from Blowouts

P2+ Spot Level Impressions by Pod, Primetime NFL Game

Average Commercial Minute Audience

SLI vs. ACM =
-209 million Imps
44 units
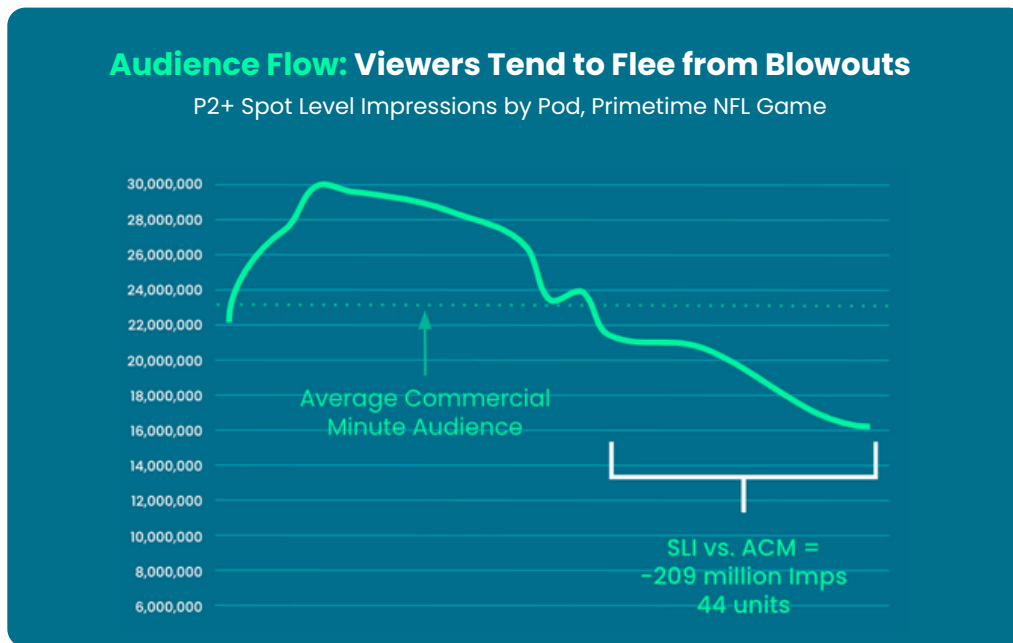
More Impressions, More Conversion Opportunities

Ad placements' direct impact on exposures can help drive decision-making for brands during NFL games. While there's a chance audiences grow late during a close and exciting game, there's also significant risk in blowouts shedding audience (and reducing reach, despite what you pay for upfront).

Reduced exposures also reduce the opportunities for outcomes—which is problematic no matter the ad placement, but especially during NFL games, which have high conversion rates *and* more scale than other programming.

Given the massive delta between the Spot-Level Impressions and Average Commercial Minute Audience of the NFL's 2nd most active advertiser, we examined the drivers at play. Pod placement was unequivocally the primary issue driving the difference between spot-level impressions and average commercial audience.

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Broadcast Uses NFL to Deliver Big Ad Outcomes

Importance of Outcomes

NFL-focused networks are able to charge higher premiums for ad placements during the NFL season, not just because of the large audiences, but because of how many of these ads can drive real business outcomes with viewers.

Here, we showcase specific industries that found high average brand lift on NFL-focused networks in Q4 2024 (where the bulk of the season takes place).

Wireless Carriers

+41.79%

Avg. 7-Day Lift

Insurance

+37.88%

Avg. 7-Day Lift

Food Delivery

+29.76%

Avg. 7-Day Lift

For wireless and insurance brands, lift above 35% from major networks can create significant inbound interest for longer-lead purchases. In Fox's case, nearly 30% lift for food delivery brands can mean immediate sales—with many viewers using food delivery services while watching football action each week.

How NFL Ads Drove Chip Purchases

54%
of converted households for chip ads **purchased within one day of viewing.**

50%
of converted households for chip ads purchased **after 27 or fewer exposures.**

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Mahomes, NFL Legends Still Land

Retired players like Peyton Manning, JJ Watt and Rob Gronkowski are still some of the most recognizable football faces on TV, and brands leaned into them during ads.

Travis Kelce actually fell out of the top 10 most-seen NFL player/coach spokespeople—his 99 airings were just outside—but the Chiefs were still well-represented, with Patrick Mahomes leading (423 airings), and coach Andy Reid rounding out the top 10. Kelce's engagement could bring a 2025-26 surge for the tight end, however, as interest in his likeness may never be higher again.

Most-Seen Athletes of the 2024–25 NFL Season

Including playoffs, excluding Super Bowl.

Rank	Talent	Total Airings
1	Patrick Mahomes II	423
2	Peyton Manning	318
3	JJ Watt	238
4	Rob Gronkowski	201
5	Davante Adams	172
6	Derrick Henry	151
7	Case Keenum	120
8	George Kittle	119
9	Amon-Ra St. Brown	115
10	Andy Reid	113

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Fictional Faces Outpace Celebs in NFL Ads

While non-sports celebrities made many appearances—Snoop Dogg led the way last year with over 200 airings during NFL games—the bigger narrative for brands was the use of invented spokespeople. Kevin Miles (Jake from State Farm) and mascots like the GEICO Gecko and LiMu Emu all appeared in a significant number of ad airings during live NFL games last year. These figures are interesting since they provide similar familiarity to celebrities without the same price tag attached.

Most-Seen Non-Athletes of the 2024–25 NFL Season

Including playoffs, excluding Super Bowl.

Rank	Talent	Total Airings
1	Kevin Miles	392
2	GEICO Gecko	233
3	Snoop Dogg	206
4	Kai Cenat	175
5	Cristo Fernández	121
6	Jennifer Garner	111
7	Dolph Lundgren	84
8	LiMu Emu	83
9	Will Ferrell	77
10	Eric André	76

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Streaming-Only NFL Advertisers

Advertisers Appearing on Prime Only

62 # of advertisers that only appeared during Amazon Prime Video games during the 2024-25 NFL regular season

Many advertisers ran ads across linear and streaming NFL broadcasts, but others stuck to Amazon Prime Video exclusively to leverage its targeting and retail integrations. Some would later expand from Amazon-only to playoff and Super Bowl spots, too.

Amazon-Exclusive Brands

Amazon Brands

amazon business | amazon echo | fire tv | music | AMAZON STUDIOS

Unaffiliated Advertisers

AMC | American Airlines | Bloomberg | BLUE BUFFALO | Carl's Jr. | Cheerios | Chex

COLDWELL BANKER | Coca-Cola zero SUGAR | Dove | Dove MEN+CARE | Dove MEN+CARE | DUPIXENT (dupilumab) Injection | Dymatize | ENHERTU fam-trastuzumab deruxtecan-nxki 20 mg/mL INJECTION FOR INTRAVENOUS USE

DELL | ESTĒE LAUDER | FRAM | Hallmark CHANNEL | Hardee's | HERSHEY'S | HONEY BUNCHES OF OATS | Hydro Flask

ck | JCPenney | Levi's | MATTRESS FIRM | NATIONAL ASSOCIATION OF REALTORS | NATURE VALLEY | NINJA

Pillsbury | pluto tv | Qualcomm | QUEST NUTRITION | RACHAEL RAY NUTRISH | RALPH LAUREN FRAGRANCES | Reese's

Rocket Money | SAMSUNG | SAP | SNYDER'S OF HANOVER | Straight Talk wireless | Coleman | TOPGOLF

Totino's | TRAVEL TEXAS | vistaprint | Walgreens | VOLVO | xfinity mobile | YETI

Amazon Prime-only NFL ad strategies varied. Some opted for local targeting plays, or used the younger audience to hone in on specific consumers. Others still plugged into advanced ad capabilities to create direct calls to purchase via QR codes and other interactive elements. Amazon also gave smaller brands access to NFL audiences they may not have reached otherwise.

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Sportsbooks + New Advertisers Betting On NFL

Sports Betting Pulls Back, FanDuel Surges

FANDUEL

#1

Sportsbook Brand by
National Linear NFL
Game Reach in '24-25

During live national linear NFL games, sports betting brands actually spent 9% less YoY ($164 million), while household TV ad impressions dipped by 13%. FanDuel grew its share of sportsbook TV ad impressions during games by over five percentage points YoY, to keep the most reach in the industry.

New NFL Advertisers Last Year (2024-2025 Season)

Top advertisers that did not air during the 2023-24 season, by 2024-25 NFL ad reach.

Rank	Brand	NFL TV Ad Impressions
1	**Nationwide Insurance**	**1.04B**
2	**Corona**	**560MM**
3	**PayPal**	**558MM**
4	**PLUVICTO**	**379MM**
5	**VRBO**	**359MM**
6	**Microsoft Copilot**	**321MM**
7	**ServiceNow**	**218MM**
8	**Scopely**	**207MM**
9	**Tremfya (Ulcerative Colitis/Crohn's Disease)**	**199MM**
10	**NÜTRL**	**190MM**

- Nationwide was back with a bang last season, as one of the 25 most-seen brands during NFL games and the top "newcomer" (year-over-year) by nearly 2x impressions thanks to an emphasis on Peyton Manning.

- PayPal's Will Ferrell campaign leveraged the NFL and other tentpole programming to showcase payment flexibility with the service, surging into a space with limited disruption during NFL games in recent seasons.

- The NFL was part of a larger push for VRBO as it nearly doubled its est. national linear TV ad spend in 2024, using an ad blitz aimed at competitive de-positioning to reach for a larger share of the rental market.

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Stretch Run Delivers Biggest Ad Reach Wins

Late-season showdowns were the biggest draws last season, as six of the top 10 games by TV ad reach occurred in November or December. To no surprise, the Chiefs appeared in five of the games, led by their week 11 clash with the Bills.

Thanksgiving weekend also accounted for four of the top 10 games by ad deliveries. Bears/Lions was No. 1 on Turkey Day, with Giants/Cowboys in second (No. 8 overall). Sunday matchups between the Eagles and Ravens, and 49ers and Bills, respectively finished among the top 10 as well.

The heavier focus on late-season games can help inform advertisers' approaches to the NFL season, too. As the race for the playoffs heat up, it may be more valuable to buy against later weeks to maximize reach.

Top NFL Games by Household TV Ad Reach in 2024

Rank	Air Date (ET)	Game	Network
1	Nov. 17, 2024	Kansas City Chiefs @ Buffalo Bills	CBS
2	Nov. 28, 2024	Chicago Bears @ Detroit Lions	CBS
3	Dec. 1, 2024	Philly Eagles @ Baltimore Ravens	CBS
4	Sept. 5, 2024	Baltimore Ravens @ Kansas City Chiefs	NBC
5	Sept. 22, 2024	Kansas City Chiefs @ Atlanta Falcons	NBC
6	Oct. 27, 2024	Dallas Cowboys @ San Francisco 49ers	NBC
7	Dec. 8, 2024	Los Angeles Chargers @ Kansas City Chiefs	NBC
8	Nov. 28, 2024	New York Giants @ Dallas Cowboys	FOX
9	Oct. 20, 2024	Kansas City Chiefs @ San Francisco 49ers	FOX
10	Dec. 1, 2024	San Francisco 49ers @ Buffalo Bills	NBC

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Evening News Tops NFL Offseason Viewing

Understanding audience overlap and lookalike data helps advertisers better optimize their spend to reach intended viewers—sometimes at a fraction of the cost it would require to appear during tentpole events. For Example, there is significant overlap between live NFL game viewership and some rerun programming, where ads typically cost even less: Law & Order SVU (36.7%), The Big Bang Theory (33.7%) and Diners, Drive-Ins and Dives (33.6%) had some of the highest offseason reach among NFL audiences.

Most-Watched Offseason Programs Among NFL Fans

Non-sports shows that had the highest overlap with avid NFL audiences during the league's offseason (Feb. 10-July 30, 2025).

Series	Reach Percentage
ABC World News Tonight With David Muir	66.39%
60 Minutes	64.29%
CBS Evening News	63.08%
NBC Nightly News With Lester Holt	61.26%
Law & Order: Special Victims Unit	53.47%
Saturday Night Live	51.42%
Tracker	51.31%
American Idol	50.96%
The Late Show With Stephen Colbert	49.70%

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Unify Your NFL Ad Investments

This NFL season is more fragmented than ever with games scattered across networks, streaming platforms, and exclusive deals that make tracking your investments a nightmare. But, you can turn that chaos into clarity. iSpot measurement covers 98.5% of all matchups this season, giving advertisers like you a unified view of where your dollars are actually working.

Armed with that visibility, you can maximize the impact of every impression: showing where to invest, where to trim waste, and which creative trends are driving results before the Super Bowl spotlight hits.

Get a unified view of the 2025-26 season with our complimentary broadcast calendar that makes it easy to see which publishers and networks are airing NFL games on which days.

Get the NFL Broadcast Calendar

Glossary

Outcome Methodology: iSpot's 605 attribution platform is built on top of a massive, 100% matchable, deterministic dataset spanning over 34MM anonymized households and powered by a proprietary causal attribution methodology that relies on a high-dimensional matching algorithm to ensure the most reliable solutions in the industry.

Household TV Ad Impressions: A verified play of an ad on a TV screen, counted at the Household Level.

Audience Overlap: An ad impression exposure to both highlighted programs, in this case the audience member saw an ad on both the NBA Playoffs and Stanley Cup Playoffs.

Likeability Score: Measures the extent to which survey respondents like an ad.

Est. National TV Ad Spend: The estimated amount spent on TV ad airings (how much it costs).

Incremental Conversions: Measures the increase in conversions directly attributable to ad exposure.

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About iSpot

iSpot helps advertisers drive ad effectiveness with unified TV and video measurement, from creative to audience to outcomes. Our fast, accurate and actionable measurement solutions enable advertisers to assess creative effectiveness, improve media plans and drive business outcomes from TV and streaming advertising. Only iSpot is purpose-built to measure the performance of every ad on TV with digital-like precision and granularity.

Empowered with always-on cross-platform performance insights, advertisers can take quick and confident action to cut wasted ad spend. With currency-grade measurement, large-scale verified insights, and deep competitive intelligence, iSpot gives advertisers control and confidence amid the chaos of the new media landscape.

Data Footprint

- 68K brands
- 2.7 million creatives
- 183 TV networks
- 207 Media Markets
- 500+ streaming platforms and DSPs
- 82.7 million smart TVs and set-top boxes
- Trillions of impressions & millions conversions attributed to millions of creatives
- 160,000+ video ads with creative assessment data

Data Quality

- Patented ad detection processes and software
- 40 around-the-clock human editors
- Best-in-class data science, processing and modeling
- Rigorous quality assurance and data integrity for survey-based creative assessment

Corporate Facts

- Founded in 2012
- Over 750 customers across brands, agencies and publishers
- Over 450 employees

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