

# 2009 Super Bowl Research Brief



## **SUPER BOWL ADVERTISING CAMPAIGNS ANALYSIS**

*Record levels of commercial time ... second-by-second ratings ...  
the buzz and traffic generated online*

**TNS Media**'s annual post-game analysis of Super Bowl advertising combines findings on this year's brand face-offs, including top advertisers and commercial ratings, as well as the online buzz and traction generated by this year's winners and losers.

"The Super Bowl is certainly a unique event because of its ability to command nearly national attention at one time, but it also demonstrates the impact that truly integrated advertising initiatives can have," says Dean DeBiase, CEO of TNS Media. "Marketers work to ensure synergies between their traditional, online and in-store promotional activities, but not to the extent seen in the Super Bowl. The results seen here – from the ability of broadcast advertising to drive traffic to sites, initiate online conversations and have that emotional equity come full circle at retail – should serve as a catalyst to encourage deeper integration across all media platforms year round."

A complete log of all commercials, their pod positions and actual creatives are available at: [www.tns-mi.com/resources/creativeSuperBowl2009.htm](http://www.tns-mi.com/resources/creativeSuperBowl2009.htm)

## **ADVERTISING CLUTTER, TOP ADVERTISERS AND CATEGORIES**

### **RECORD-SETTING LEVEL OF AD TIME**

Super Bowl XLIII featured a record-tying amount of network commercial time. Between the opening kickoff and the final whistle, NBC aired 45 minutes, 10 seconds of advertising messages. This included paying sponsors, messages from the NFL and promotional plugs from NBC for its own programming. The past four games now occupy the top four spots in terms of Super Bowl ad clutter.

<b>Network Ad Time (mm:ss) in the Super Bowl Game</b>			
<b>Year</b>	<b>Total Ad Time</b>	<b>Brand Ads</b>	<b>Network Promos</b>
2009	45:10	38:00	7:10
2008	44:30	36:35	7:55
2007	43:05	33:30	9:35
2006	44:15	36:55	7:20
2005	40:15	35:20	4:55
2004	41:55	34:00	7:55

*Source: TNS Media Intelligence*

### **TOP ADVERTISERS**

A total of 32 different companies aired in-game spots for a total of 84 commercials. The top four advertisers (excluding program promotions aired by NBC) in terms of total ad time were PepsiCo, Anheuser Busch InBev, General Electric and Viacom. This elite group accounted for 40 percent of the total paid ad time.

<b>Top Advertisers in 2009 Super Bowl Game</b>		
<b>Parent Company</b>	<b>Ad Time (mm:ss)</b>	<b># Units</b>
PepsiCo	5:30	8
Anheuser-Busch InBev	4:30	7
General Electric*	2:30	4
Viacom	2:30	3

\* Excludes one minute of ad time for Hulu.com, a joint venture of General Electric (NBC) and News Corp (Fox).

*Source: TNS Media Intelligence*

The softening ad market for 2009 Super Bowl spots led to speculation that General Electric divisions might be required to step in and buy unsold inventory to help out sister-company NBC. The movie studio and theme park divisions of GE have regularly advertised in previous Super Bowls on other networks, so it's far-fetched to construe their presence in the 2009 game as the outcome of an inventory fire-sale.

What's a 'normal' level of in-house ad activity for the Super Bowl broadcaster? The past four years have seen four different networks air the game. During this cycle, the advertising presence of the network's owner has ranged from 30 seconds to 4 ½ minutes. GE's 2009 footprint of 2:30 is larger than either News Corp in 2008 or National Amusements in 2007. However, it lags the 4:30 of air time that Disney-owned entities had in the 2006 telecast on ABC.

<b>“In-House” Super Bowl Ad Time Purchases (excluding the network’s TV program promotions)</b>			
<b>Year</b>	<b>Super Bowl Net</b>	<b>Network Parent Owner</b>	<b>mm:ss of Ads from Parent Owner</b>
2009	NBC	General Electric*	2:30
2008	Fox	News Corp	0:30
2007	CBS	National Amusements	1:00
2006	ABC	Disney	4:30
* Excludes one minute of ad time for Hulu.com, a joint venture of General Electric (NBC) and News Corp (Fox).			
<i>Source: TNS Media Intelligence</i>			

### **Top Categories**

Motion pictures continued to be the dominant Super Bowl ad category as Hollywood studios attempted to build awareness for upcoming releases. Nine different movies had in-game ads, a level on par with recent years. However, this year the studios opted for longer-length units as compared to 2008.

Non-alcoholic beverages also had a significant presence in the game but the competitive battlefield was a bit narrower than 2008. Pepsi and Coke again went head-to-head with their soda brands. But unlike a year ago, Coke abstained from promoting its non-soda brand lines and conceded that stage to Pepsi which ran spots for Gatorade and SoBe Life.

Reflecting the current tenor of the auto market, car manufacturers had a reduced presence with Audi, Hyundai and Toyota combining for just 3 minutes of air time. Supplementing this was another 2:30 of ads from auto-related advertisers Bridgestone (tires), Cars.com and Castrol (motor oil) to keep the total category even with last year.

Product Category	2009 Game		2008 Game	
	# Unique Products	Ad Time (mm:ss)	# Unique Products	Ad Time (mm:ss)
Motion Pictures	9	7:00	7	4:00
Automotive	8	5:30	7	5:30
<i>Auto Manufacturers</i>	5	3:00	5	4:00
<i>Other</i>	3	2:30	2	1:30
Non-Alcoholic Beverages	6	5:30	8	7:30
<i>Soft Drinks</i>	4	4:00	3	4:00
<i>Non-Soft Drinks</i>	2	1:30	5	3:30
Beer	3	4:30	2	4:00
<i>Source: TNS Media Intelligence</i>				

## MOVIE STUDIOS' TV INVESTMENT PAYS OFF WITH ONLINE BUZZ

Not only did the movie studios dominate TV ad time, they also dominated the discussion in the first 36 hours following the game: five of the ten most-discussed advertisers were movies. Almost half of the discussion of Super Bowl ads took place on social media sites focused on movies, video games, and entertainment news.

### Most Talked About Advertisers

Advertiser	Volume Index*
<i>Transformers: Revenge of the Fallen</i>	737
<i>Star Trek</i>	500
Anheuser-Busch	476
<i>GI Joe: Rise of Cobra</i>	455
Doritos	387
Pepsi	309
<i>Land of the Lost</i>	261
<i>Fast and Furious</i>	221
Coca Cola	215
Hulu	198
<i>Source: TNS Cymfony</i>	

\* Volume index represents the amount of discussion for each advertiser, relative to the median amount of discussion for all Super Bowl advertisers. E.g. Transformers received more than seven times the amount of discussion of the average advertiser.

While Doritos may have won the Super Bowl ad voting on *USAToday*, Anheuser-Busch bested all non-movie advertisers in the amount of discussion generated by their ads. Four of their ads generated strong positive discussion: Bud Light “Swedish”, Bud Light “Meeting”, Clydesdale “Stick” and Clydesdale “Circus”.

The advertisers that didn’t make the most-discussed list are also interesting: E-Trade “Talking Baby” and Audi “Chase” among them.

“This year, viewers engaged with ads about entertainment and affordable indulgences,” noted Jim Nail, Chief Marketing Officer of TNS Cymfony. “Financial services and automobiles are not on consumers minds, so their ads -- which have been popular in past years – didn’t resonate this year.”

TNS Cymfony’s analysis of traditional and social media showed that the volume of pre-game online discussion nearly doubled while media coverage increased 37%. “The spike in pre-game coverage and discussions emphasizes that marketers need to blend social media, traditional media, and buzz around the water cooler to maximize the ROI of expensive Super Bowl ads,” said Jim Nail.

## SECOND-BY-SECOND RATINGS

TNS Media Research analyzed audience viewing behavior during the game and the commercial breaks. The following highlights are based on unique second-by-second clickstream data collected from over 300,000 Households (HH) in the Charter Communications Los Angeles digital cable system:

- On average, 29.8% of HH’s tuned into the game itself. The pre-game show averaged a 22% rating while over 23.4% of homes viewed at least one second of the post-game award presentation.
- 5.3% of HH’s viewed the game on NBC-HD, representing close to 11% of the total audience.
- As expected during the Super Bowl, few viewers tuned away from the commercial breaks during the game with the spot-to-program retention index averaging 100 (CVI). The highest commercial retention score went to the promotional ad marketing various USA network programs, which posted a 121 in the spot just after the game ended. During the post-game as viewing dropped from a rating of 32.1% to 23.4%, the commercial retention remained constant. The last pod, airing prior to *The Office*, averaged a CVI retention score of 95.
- A second-by-second look at commercial avoidance reveals that about 1% of commercial seconds were avoided by channel changing.
- Interestingly, the NBC-HD audience was even less likely to tune away, with only 0.8% percent of those seconds being lost, perhaps reflecting the fact that almost all of the Super Bowl advertising was presented in high definition.

## SUPER BOWL ADVERTISERS' ONLINE PRESENCE

### Top Gaining Advertiser Web Sites

Web site	Change in Daily Reach on Super Bowl Day*
Dennys.com	1679%
Cheetos.com	313%
Budweiser.com	148%
Gatorade.com	143%
Budlight.com	104%
Godaddy.com	103%
Hyundaiusa.com	78%
Hulu.com	76%
Bridgestonetire.com	69%
Teleflora.com	65%
<i>Source: TNS Compete</i>	

\* Represents the change in daily reach to the Web site from the average during the week preceding the Super Bowl. Eg. Dennys.com reach on the day of the Super Bowl was nearly 17 times higher than during the week leading up to the game.

Super Bowl advertisers ranged from those with strong, established online presences, to “up and comers, to digital neophytes.

- Anheuser-Busch – One of the Super Bowl’s top advertisers and most talked about brands came in third in growth in daily reach on Super Bowl Sunday. Budweiser.com, a site which has historically ranked among the top 30,000 US Web sites, saw its reach nearly double on Super Bowl Sunday.
- Hulu – Despite the prominence of entertainment in ad time, this online video service (co-owned by NBC Universal, News Corp. and Providence Equity Partners) ranked near the bottom. The “Alec in Huluwood” ad, which did not present a clear call to action, can be found on Hulu.com.
- Denny’s – Denny’s free grand slam giveaway scored with Super Bowl viewers. Visitors to Dennys.com were rewarded with a reminder of the “Enjoy a Free Grand Slam” on the home page along with a convenient Restaurant Locator.

“It is not surprising that we see some of the most talked about advertisers at the top of the pack in terms of site traffic on Super Bowl Sunday,” noted to Matthew Pace, Director of Retail at TNS Compete. “It’s more evidence that a strong call to action alone is not enough to engage consumers, you need to have messaging that resonates with the consumers you are trying to target, like a free breakfast.”

## SUPER BOWL AD HIGHLIGHTS FROM YEARS PAST

*Ad pricing trends ... influx of new advertisers ... more cluttered air time ... impact on commercial audiences ... the buzz generated in social media*

**M**ore than just sports fans eagerly look forward to the Super Bowl. For millions of consumers, the TV commercials that appear during the game are also the subject of anticipation. And participating advertisers are confronted with the difficult question of whether the Super Bowl is a smart marketing investment or a wasted use of the budget, especially in light of the current economic climate.

“The true cost to a Super Bowl advertiser far exceeds the price of just the air time. There’s the expense of producing elaborate, new commercials for the game and for an increasing number of marketers, there are additional outlays for integrated communications programs intended to leverage their Super Bowl sponsorship,” notes Dean DeBiase, CEO TNS Media. “While the cost premium makes it more difficult to achieve a strong ROI, a select group of advertisers believe that the potential reward is worth the investment, even during a period when overall ad spending is under pressure. However, as the long-term trend of data indicates, the Super Bowl endures as the premier venue for advertising in terms of ad rates and the ability of commercials shown in conjunction with the event to engage and hold viewers.”

TNS Media companies -- TNS Media Intelligence, TNS Media Research and TNS Cymfony -- combed through their extensive databases to report on key trends in Super Bowl advertising.

## THE PRICE OF ADVERTISING

The cost of an advertisement in the Super Bowl has **quadrupled in the past 20 years**, reaching \$2.7 million for a 30-second unit in the 2008 game. For 2009, NBC reportedly sought \$3.0 million for each 30-second spot. According to NBC Universal President and CEO Jeff Zucker, NBC sold all game advertising set a Super Bowl record of \$206 million in advertising revenue.

SUPER BOWL AD RATES AND REVENUE 1989-2008		
Year	Cost :30 Unit (\$000)	Total Ad Revenue (\$ millions)
1989	675	35.5
1994	900	52.2
1999	1,600	97.0
2003	2,150	130.1
2004	2,302	149.6
2005	2,400	158.4
2006	2,500	162.5
2007	2,385	151.5
2008	2,700	186.3
<i>Source: TNS Media Intelligence</i>		

Compared to the average cost of commercial time on prime time network programming during the first quarter, Super Bowl spots are 18-20 times more expensive. This premium has held steady in recent years.

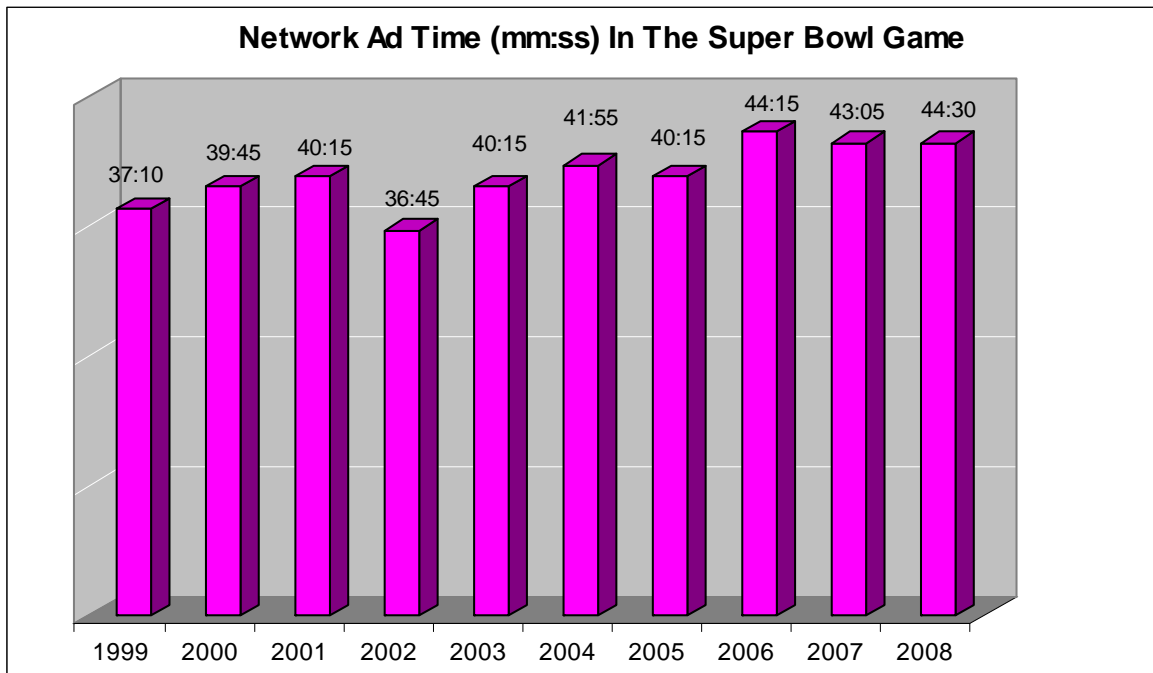
## FIRST TIME ADVERTISERS

In recent years, **first-time Super Bowl advertisers have been a significant presence**, steadily accounting for 20-25% of the companies that buy ad time. On the one hand, it indicates that a number of marketers do not return to the game which could be construed as a sign of weakness for the event. On the other hand, a diverse mix of new advertisers has been filling the void, representing both well-known and lesser-known brands. This reaffirms the Super Bowl's attractiveness to marketers willing to pay the price for access to advertising's biggest stage and an audience of engaged viewers.

Number of Super Bowl Advertisers By Year					
	2004	2005	2006	2007	2008
<b>Total</b>	29	35	33	32	34
<b>First-Time</b>	5	9	8	7	7
<b>% of Total</b>	17%	26%	24%	22%	21%
<i>Source: TNS Media Intelligence</i>					

## MORE ADVERTISING, MORE CLUTTER

Over the past ten years, the volume of commercial time in the game has been edging upwards even as the price of advertising has become more expensive. The Fox telecast of the **2008 Super Bowl contained over 44 minutes of network ads**, an all-time high. This included paying sponsors, messages from the NFL, plus “house ads” aired by Fox to promote its own programming. The 2006, 2007 and 2008 games occupied the top three spots in terms of all-time Super Bowl ad clutter. The 2009 game continued that trend.



Source: TNS Media Intelligence

## VIEWERS WATCH THE COMMERCIALS

Advertisers have long assumed that Super Bowl viewers stick around during the breaks to watch the ads but with recent improvements in audience measurement it's now possible to track viewing second-by-second and quantify how commercials actually perform.

The data confirms that **Super Bowl advertising has enormous holding power**. In the 2008 game, the index of commercial viewers to program viewers was right around 100, indicating that people opted to watch the ads instead of switching the channel. The halo extended to pre-game spots as well, but not the post-game as viewers gradually tuned away entirely.

Index of Commercial Viewers To Program Viewers 2008 Super Bowl	
<b>Pre-Game</b>	<b>101</b>
<b>First Half of Game</b>	<b>101</b>
<b>Half-Time of Game</b>	<b>99</b>
<b>Second Half of Game</b>	<b>99</b>
<b>Post-Game</b>	<b>85</b>
<b>Avg. Primetime Show</b>	<b>90</b>
<i>Source: TNS Media Research</i>	

### ONLINE INTEGRATION WITH THE TV ADS

Given the high price of TV ad time in the Super Bowl and the intense public scrutiny the commercials receive, the implications for ROI are magnified. Many marketers **seek to maximize exposure and impact for their TV ads by successfully capturing online interest and buzz**. However in any given year only a handful actually achieve this integration.

In the 2008 game, more than two-thirds of the coverage about Super Bowl advertising in traditional and social media was generated by just 10 marketers. Brands that promoted early and consistently generated more coverage and discussion than brands that waited longer to announce their involvement or lacked consistent momentum in their pre-game PR and word-of-mouth campaigns.

### Top 10 Brands in 2008 Super Bowl Ranked on Total Media Coverage (includes Traditional and Social media)

1. Pepsi
2. Anheuser-Busch
3. Coca-Cola
4. Bridgestone
5. Audi
6. Doritos
7. GoDaddy.com
8. Victoria's Secret
9. E\*Trade
10. Planters

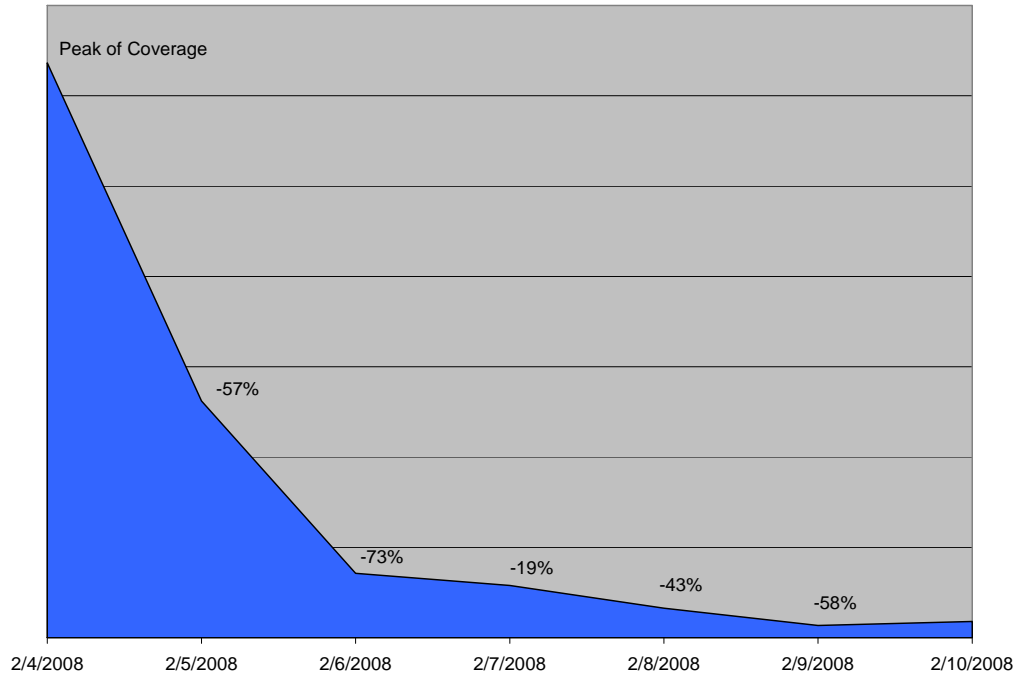
Source: TNS Cymfony

For the 2009 game, Pepsi fired an early salvo with its announcement of a 3-D ad in partnership with the DreamWorks movie studio.

## POST-GAME DISCUSSION OF THE ADS DROPS QUICKLY

The aggregate volume of traditional media coverage and social discussions about the Super Bowl commercials peaks the day after the game and then plummets sharply. This short post-game window reinforces the importance of brands having effective pre-game PR and word-of-mouth marketing strategies to ensure an adequate share of the total dialogue about the ads.

### Conversation about 2008 Super Bowl Ads Peaked the Next Day



Source: TNS Cymfony

**TNS Media** measures how well marketing influences and engages consumers across all media. With the best technology, analytics and people in the industry, we help our clients translate complex market data into targeted business results.

TNS Media business units offer comprehensive advertising, media and consumer research expertise:

**TNS Media Intelligence** is the leading provider of strategic advertising intelligence to advertisers, advertising agencies and media properties. The company's tracking technologies collect advertising expenditures and occurrence data, as well as select creative executions on more than 3 million brands across 20 media in the U.S.

For more information, please contact:  
Ms. Paris Loesch  
SVP, Media Intelligence Sales  
212.991.6007  
Paris.Loesch@tns-mi.com

**TNS Media Research** sets the standards in electronic measurement of media audience behavior, using fixed and portable metering technology and Return Path Data (RPD) from set top boxes to deliver state-of-the-art internet, TV & radio audience measurement

For more information, please contact:  
Mr. Bud Breheny  
SVP, Sales and Business Development  
212.991.6080  
Bud.Breheny@tns-mr.com

**TNS Compete** delivers digital intelligence that helps the world's top brands improve their marketing based on the online behavior of millions of consumers.

For more information, please contact:  
Mr. Garrett Mullins  
VP, Sales & Business Development  
617.933.5630  
gmullins@compete.com

**TNS Cymfony**, a market influence analytics company, scans and interprets the millions of voices at the intersection of social and traditional media to give brands insights into brand perception, marketing and public relations effectiveness, and competitive intelligence.

For more information, please contact:  
Mr. Andrew Bernstein  
President  
617.673.6003  
abernstein@cymfony.com

### **About TNS Media**

Established in more than 30 countries, TNS Media explores all media - print, radio, TV, Internet, social media, cinema and outdoor worldwide, 24 hours a day, seven days a week, and offers a full range of insights, analyses and audience measurement services.

TNS Media combines the deepest expertise in the industry to provide media and marketing intelligence including advertising expenditure monitoring, advertising creation monitoring, audience measurement, market influence analytics, online consumer behavior tracking, news monitoring, sports sponsorship evaluation and more. The TNS Media companies track more than 3 million brands and provide vital market intelligence to 16,000 customers around the world. For further information, please visit [www.tnsmediagroup.com](http://www.tnsmediagroup.com)

### **About Kantar Group and TNS**

The Kantar Group is one of the world's largest research, insight and consultancy networks. By uniting the diverse talents of more than 20 specialist companies – including the recently-acquired TNS – the group aims to become the pre-eminent provider of compelling and actionable insights for the global business community. Its 26,500 employees work across 80 countries and across the whole spectrum of research and consultancy disciplines, enabling the group to offer clients business insights at each and every point of the consumer cycle. The group's services are employed by over half of the Fortune Top 500 companies. For further information, please visit [www.kantargrouptns.com](http://www.kantargrouptns.com)



[www.tnsmediagroup.com](http://www.tnsmediagroup.com)