

Press Information

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KANTAR MEDIA REPORTS THE SUPER BOWL SCORES WITH OVER \$2 BILLION IN AD SPENDING OVER THE PAST TEN YEARS

Historical Advertising Data Shows Trends Including Increasing Prices, Growing Competitive Clutter, Strongly Engaged Viewers and High Sponsorship Value

New York, NY, January 14, 2014 – The Super Bowl will be played on February 2 at MetLife Stadium in East Rutherford, NJ, marking its first visit to both the New York metropolitan area and an open-air stadium in a cold-weather climate. After last year's Blackout Bowl in New Orleans, the NFL is hoping this year to avoid a Blizzard Bowl for its marquee event.

While the "will it snow" question and new venue will surely help rivet football fans to the game, the advertising industry will instead be focused on the commercials that appear during the TV broadcast. Which marketers will score or fumble during this year's Ad Bowl, in front of an audience of 100+ million critical and demanding judges?

Kantar Media has mined its extensive database to report on the past ten years of Super Bowl advertising. From 2004 through 2013, the Super Bowl game has generated **\$2.01 billion of network advertising sales** from more than 130 marketers.

The Price of Advertising

The average rate for a 30-second advertisement in the Super Bowl has increased by more than 70 percent during the past decade and reached \$4.0 million in 2013. It's the most expensive commercial time on television by far. (The runner up: the Academy Awards at \$1.6 million per :30). Healthy demand is expected to result in **slightly higher pricing for the 2014 game.**

The actual amount paid by individual marketers will vary depending on where the ad runs in the game, how much commercial time is purchased and whether the advertiser opts for a larger package that includes spots in the pre-game and/or post-game coverage.

Super Bowl Ad Rates and Spending		
Year	Average Cost :30 (000)	Total Ad Spend (Million)
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
2009	\$3,000	\$213.0
2010	\$2,974	\$205.2
2011	\$3,100	\$227.9
2012	\$3,500	\$262.5
2013	\$4,000	\$292.0

Source: Kantar Media

Super Bowl Ads Have Exceptional Holding Power

In exchange for the buying the costliest ad time on TV, advertisers benefit by reaching **an audience that stays around during the commercial breaks**. In the 2013 game the percentage of audience tuneaway during the average commercial was a miniscule 0.7 percent, compared with a rate of 3 to 4 percent for regular TV programming. The holding power of ads is very consistent throughout the broadcast. It's proof that people are interested in seeing Super Bowl commercials.

Of equal significance, the 2013 game scored a commercial tuning index (CTI) of 101.6, meaning the average Super Bowl commercial attracted an audience that was 1.6 percent larger than the average audience for the game itself.

More Advertising, More Clutter

Even as Super Bowl ad pricing has increased, the volume of commercial time in the game has also been expanding. **The past four Super Bowls have been the most ad-saturated in history**, each containing more than 47 minutes of commercial time. This includes paying sponsors, commercial messages from the NFL, and promotional announcements from the network for its own shows.

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Network TV Commercials In The Super Bowl		
Year	Ad Time (mm:ss)	# of Commercials
2004	41:55	88
2005	40:15	76
2006	44:15	92
2007	43:05	92
2008	45:10	84
2009	45:10	84
2010	47:50	104
2011	48:10	96
2012	47:25	78
2013	51:40	97

Source: Kantar Media

The exceptionally large increase in ad time for the 2013 game was partly due to an on-the-spot decision by CBS to re-run a commercial pod that first aired just after the game was halted by a stadium power outage. CBS was unsure whether its broadcast signal survived the blackout and as a precaution for the affected advertisers it re-aired their commercials later in the game.

Longer Length Commercials

Despite the high cost of air time in the Super Bowl, a significant proportion of **advertisers opt to spend even more by running longer length commercials**. It's an effort to tell a deeper story and further engage viewers. Fifteen spots in the 2013 game were 60 seconds or longer, including a trio of 120 second announcements.

Ads Of 60+ Seconds In The Super Bowl					
	2009	2010	2011	2012	2013
Total #	13	11	10	15	15
% of All Ads	15%	11%	10%	19%	15%

Source: Kantar Media

By comparison, the normal proportion of long-form ads on broadcast networks is about six percent.

Top Five Super Bowl Advertisers

During the past five years **the top five Super Bowl advertisers have spent \$437.0 million on advertising during the game**, accounting for 36 percent of total advertising revenue. Anheuser-Busch

InBev and Pepsico lead the pack, followed by Hyundai, Chrysler and Coca-Cola.

Top 5 Super Bowl Advertisers			
2009-2013			
Rank	Advertiser	# of Years With Ads In Game	Ad Spend (Million)
1	Anheuser-Busch InBev	5	\$145.9
2	Pepsico Inc	5	\$97.0
3	Hyundai Corp	5	\$67.4
4	Chrysler Group LLC	4	\$64.3
5	Coca-Cola Co	5	\$62.3
Top 5 Total			\$437.0

Note: The sum of the individual companies differs from the total shown due to rounding

Source: Kantar Media

First Time Advertisers

In recent years, there has been a steady influx of first-time advertisers eager for the recognition and brand-building opportunity of the Super Bowl spotlight. In 2013 **first-time advertisers accounted for 18 percent of the Super Bowl ad lineup.**

A sizable rookie class is also expected in 2014. Marketers who have publicly confirmed their first-time participation include Chobani, Intuit, Tata Motors and Nestle.

Number Of Super Bowl Parent Company Advertisers By Year					
	2009	2010	2011	2012	2013
All Advertisers (#)	30	39	29	33	34
First-Timers (#)	7	7	4	9	6
First-Timers (%)	23%	18%	14%	27%	18%

Source: Kantar Media

Small Players on a Big Stage

The daunting price of Super Bowl ad time would seem to be a barrier to small marketers with limited budgets. However, each year the roster of Super Bowl advertisers includes several companies who invest a hefty chunk of their annual budget to buy commercial time. In 2013, four Super Bowl advertisers put **more than 10 percent of their full-year media budgets into the game.**

Advertisers Investing More Than 10% Of Their Annual Media Budget In The Super Bowl					
	2009	2010	2011	2012	2013
Total #	7	13	7	4	4
% Of All Super Bowl Advertisers	23%	33%	24%	12%	12%

Source: Kantar Media

The most leveraged sponsor in the 2013 Super Bowl was Gildan Activewear. Its \$4 million ad buy represented 55 percent of its full year measured ad expenditures.

Top Super Bowl Advertising Categories

Over the past decade, the Super Bowl has attracted a **bevy of different automotive, movie studio and dot-com companies**, making these the most populous and competitive ad categories.

Number of Super Bowl Parent Company Advertisers By Category					
Category	2009	2010	2011	2012	2013
Total # of Advertisers	30	39	29	33	34
Auto Manufacturers	3	4	6	7	6
Motion Pictures	4	3	4	5	3
Dot-com	9	6	6	4	3

Source: Kantar Media

Competitive message clutter within the motion picture sector is usually more severe than the table implies because studios often use their inventory to promote multiple films. By recent standards, the 2013 Super Bowl was a quiet year for movie advertising with only four different films promoted. In 2012, seven different movies were featured.

Traffic Congestion: Auto Advertising

The 2013 Super Bowl was the third consecutive year with a glut of automotive ads. A whopping \$92 million was spent on twelve messages for nine different brands. **Automakers will be well represented in the 2014 game.** Based on corporate announcements thus far, at least seven different auto nameplates (Audi, Chevrolet, Hyundai, Jaguar, Kia, Toyota and Volkswagen) will have ads.

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Auto Manufacturer Advertising in The Super Bowl				
Year	Total Ad Spend (Million)	Total Ad Time (mm:ss)	# Unique Parent Companies	# Unique Brands
2004	\$20.7	4:30	4	5
2005	\$26.4	5:30	4	5
2006	\$20.0	4:00	4	5
2007	\$21.5	3:50	3	4
2008	\$21.6	4:00	4	4
2009	\$18.0	3:00	3	3
2010	\$29.7	5:00	4	6
2011	\$77.5	12:30	6	9
2012	\$94.5	13:30	7	12
2013	\$92.0	11:30	6	9

Source: Kantar Media

The Media Value Of On-Screen Sponsor Exposure

Paid commercials airing during breaks in the game are the most common means for marketers to reach Super Bowl TV viewers. However, there are two additional on-screen exposure opportunities that provide high value for specific sponsors: (1) the venue sponsor; and, (2) the halftime show sponsor.

Kantar Media projects that **venue sponsor MetLife will receive about \$10.4 million in Sponsorship Media Value** from the Super Bowl. This is based on an average 6 minutes, 35 seconds of exposure during the in-game broadcast, primarily via verbal mentions from the TV announcers. Sponsorship Media Value, a proprietary calculation developed by Kantar Media, takes into account duration, source and prominence of the sponsor's on-screen exposure

For halftime Super Bowl sponsor Pepsi, the expected exposure time based on historical averages is 4 minutes, 31 seconds which would equate to about \$7.2 million of Sponsorship Media Value. Exposure for the halftime sponsor is through on-screen billboards appearing during the first and second quarter of the game, verbal mentions from the announcers and stage signage during the performance itself.

Tweeting the Night Away

The Super Bowl generates plenty of second-screen activity during the game and marketers have been ramping up efforts to communicate with these multi-platform consumers. One technique that has been quickly and widely adopted is the inclusion of Twitter hashtags in Super Bowl commercials.

According to Kantar Media’s analysis of commercials shown during the game, **the incidence of ad hashtags in 2013 was 41 percent** (26 ads out of a total of 63) compared to 10 percent (6 of 62) in 2012.

Twitter has reported these ad-related hashtags generated 300,000 tweets on game day, an average of 11,500 per commercial. The comparable numbers for the 2012 game were roughly 81,000 total tweets for an average of 13,500 per commercial. To put these 2013 numbers in perspective, Twitter reported there were 24.1 million tweets about the game and halftime show. That’s 80 times more than the number of ad-related tweets.

How Large Is The Super Bowl Versus Other Sport Franchises?

Major League Baseball’s World Series and the NCAA Men’s Basketball Championship are two other high profile sporting events that attract significant interest from TV advertisers. But how do these compare to the Super Bowl in terms of ad spend?

The World Series is comprised of four to seven games. March Madness peaks with the semi-finals and championship on its final weekend, a total of three games. The Super Bowl, of course, is a single telecast and in recent years it has been pulling away from March Madness and the Fall Classic.

Major Sporting Championships Network TV Ad Revenue (In Millions)				
Year	Super Bowl Game	World Series (# games)		NCAA Men’s Basketball Final Four (# games)
2009	\$213.0	\$223.6	(6)	\$163.2 (3)
2010	\$205.2	\$191.2	(5)	\$177.2 (3)
2011	\$227.9	\$268.8	(7)	\$169.9 (3)
2012	\$262.5	\$153.0	(4)	\$183.8 (3)
2013	\$292.0	\$247.6	(6)	\$198.5 (3)

Source: Kantar Media

About Kantar Media

Kantar Media provides critical information that helps our clients make better decisions about communications. We enable the world’s leading brands, publishers, agencies and industry bodies to navigate and succeed in a rapidly evolving media industry. Our services and data include analysis of paid media opportunities; counsel on brand reputation, corporate management and consumer engagement through owned media; and evaluating consumers’ reactions in earned media. As the global house of expertise in media and marketing information, Kantar Media provides clients with a broad range of insights, from audience research, competitive intelligence, vital consumer behaviour and digital insights, marketing and advertising effectiveness to social media monitoring. Our experts currently work with 22,000 companies tracking over 4 million brands in 50 countries.

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