



**Local Advertising Was Also On Display During Super Bowl XLIX**

Most of the discussion and attention about the TV commercials in Super Bowl XLIX has focused on the national ads. However, a second tranche of brands also participated in the game by purchasing time in local markets from NBC affiliate stations. Each station received an allotment of approximately 7 minutes of commercial time, creating an additional opportunity for advertisers to reach Super Bowl viewers. Kantar Media has examined all of the local ads airing in the Top 100 markets during the Super Bowl game – over 1,200 spots - to gain insight into the types of sponsors accessing the event and to identify some of the noteworthy strategies.

**Leading Ad Categories**

Automotive advertising was prevalent across the Top 100 markets, with factory-sponsored messages more common in large markets and dealer commercials more numerous outside the Top 50 markets. The two most active nameplates locally were Ford and Honda, neither of which purchased network air time in any of NBC’s Super Bowl programming. Pursuing local ad buys can be a highly cost-effective strategy for these brands: Many consumers may not even realize local stations are able to sell ads separately, providing the halo effect of being a “Super Bowl advertiser” in select markets for a fraction of the cost of a national ad.

Restaurants were also a mainstay category, with spots appearing in 66 of the Top 100 markets from 39 different brands. Arbys had a presence in 15 markets and Jack InThe Box was in 17.

Outside the Top 50 markets, where the price of ad time diminishes, a more eclectic and localized group of advertisers stepped forward. Medical service providers and attorneys had a significant footprint in these geographies.

<b>Markets 1-25: % of All Local SB Spots</b>		<b>Markets 26-50: % of All Local SB Spots</b>		<b>Markets 51-100: % of All Local SB Spots</b>	
All Advertisers	100.0%	All Advertisers	100.0%	All Advertisers	100.0%
Auto Manufacturers	15.5%	Auto Dealers	13.4%	Auto Dealers	21.3%
Auto Dealers	11.8%	Restaurants	11.5%	Restaurants	12.1%
TV Service Providers	8.9%	Auto Manufacturers	9.2%	Medical Services	8.3%
Insurance	8.2%	Insurance	8.3%	Auto Manufacturers	4.5%
Restaurants	7.2%	Medical Services	7.0%	Legal Services	4.1%

Source: Kantar Media

## Notable Regional Campaigns

With each local NBC station only receiving approximately 7 minutes during the game, it takes a concerted effort to execute a multi-market Super Bowl strategy. Every year we observe marketers that pull it off at scale and 2015 offers several interesting and diverse examples.

*Church of Scientology* – For the third consecutive year, the religious movement promoted its philosophy in a 30 second unit that cleared in 16 markets, including several where it has major centers.

*SAB Miller* – Best known for its beer brands, SAB Miller also owns Redds Apple Ale and Smith & Forge Hard Cider, a pair of fermented, fruit-based alternatives to traditional beer. The company bought 30 seconds of local air time in 23 Midwest markets stretching from Kentucky to Minnesota and split it into a pair of 15 second units, one for each brand. The two spots always ran in the same ad break and always in non-consecutive positions, indicating a deliberate strategy of message separation for the brands.

*American Petroleum Institute* – The lobbying group maintains multiple campaigns focused on themes relating to energy independence and job creation. For the Super Bowl, the API aired three varieties of a pro-hydraulic fracturing message in four states plus the District of Columbia.

In Colorado, Michigan and Ohio, where the political currents have been shifting in favor of fracking, viewers saw an ad encouraging a balance between energy independence and protecting the environment. In western Pennsylvania, a region that sits atop the energy-rich Marcellus Shale and where fracking is being fiercely debated, the message points were economic benefits to local communities and the industry’s safety record. For the Beltway insiders of Washington D.C., the TV spot lauded fracking for “supporting millions of new jobs, billions in tax revenue and a new century of American energy security”.



**API - Pennsylvania**



**API – Colorado, Michigan, Ohio**

Ecuador Tourism – The government of Ecuador cleared a 30 second spot in thirteen of the top twenty markets to promote the country as a tourist destination. With the music soundtrack of “All You Need Is Love” playing in the background, the ad built to its suggestive tagline, “All You Need Is Ecuador”.

National Council on Alcoholism & Drug Abuse – With 1,200-plus local Super Bowl commercials airing in the 100 markets we examined, oddities are sure to emerge. This year, the audience in St. Louis had arguably the most uncomfortable viewing party moment.

The National Council on Alcoholism & Drug Abuse ran a very dark, 60 second ad showing a teenage boy dying in his bedroom from a heroin overdose. Yes, a dead kid during the Super Bowl. Which means Nationwide Insurance wasn’t the only Super Bowl advertiser using this motif – although its commercial received more notoriety because it played on the national stage.

Another bizarre element of the NCADA commercial was the choice of a folk music melody for the soundtrack. The song lyrics described how the addiction started with prescription painkillers and culminated fatally after a \$10 purchase of heroin.



While the topic of drug abuse merits serious attention, the combination of this creative execution and its media placement was – unusual.

### Michael & Son Services

This family-owned business provides plumbing, heating, cooling and electrical services in the Washington DC area. It may not be a glamorous line of work but it undoubtedly provides essential and skilled services to customers in their time of need. And that cuts to the heart of the marketing

challenge: how do you achieve high, top of mind awareness in a low-interest product category?  
After all, many prospective customers will only need these services infrequently or may hope they never need them at all, as in the case of emergency repairs.

Michael & Sons' chosen approach is to make quirky TV ads that are built on offbeat humor, in an effort to build durable name recognition. The ads typically start by showing a character unsuccessfully trying to complete a do-it-yourself project and end with a Michael & Sons technician unexpectedly and humorously stepping into the scene and completing the job.

For the Super Bowl, the company bought a 30 second spot in Washington DC and showed an ad that started with gravitas about mankind's discovery and mastery of fire, progressed to a scene with a caveman unsuccessfully trying to build a fire and giving up in frustration, and ended with a Michael & Sons employee arriving with a blow torch. Problem solved.



## TV MARKETS INCLUDED IN THE ANALYSIS

Markets 1-25	Markets 26-50	Markets 51+	Markets 51+
ATLANTA	ALBUQUERQUE	ALBANY, NY	LITTLE ROCK
BOSTON	AUSTIN	BATON ROUGE	MADISON
CHARLOTTE	BALTIMORE	BUFFALO	MOBILE
CHICAGO	BIRMINGHAM	BURLINGTON	NEW ORLEANS
CLEVELAND	CINCINNATI	CEDAR RAPIDS	OMAHA
DALLAS	COLUMBUS, OH	CHAMPAIGN	PADUCAH
DENVER	GRAND RAPIDS	CHARLESTON, WV	PORTLAND, ME
DETROIT	GREENSBORO	CHATTANOOGA	PROVIDENCE
HOUSTON	GREENVILLE, SC	COLORADO SPRGS	RICHMOND
LOS ANGELES	HARRISBURG	COLUMBIA, SC	ROANOKE
MIAMI	HARTFORD	DAVENPORT	ROCHESTER, NY
MINNEAPOLIS	INDIANAPOLIS	DAYTON	SAVANNAH
NEW YORK	JACKSONVILLE	DES MOINES	SHREVEPORT
ORLANDO	KANSAS CITY	EL PASO	SOUTH BEND
PHILADELPHIA	LAS VEGAS	EVANSVILLE	SPOKANE
PHOENIX	LOUISVILLE	FLINT	SPRINGFIELD, MO
PITTSBURGH	MEMPHIS	FRESNO	SYRACUSE
PORTLAND, OR	MILWAUKEE	FT MYERS	TOLEDO
RALEIGH	NASHVILLE	GREEN BAY	TRI CITIES
SACRAMENTO	NORFOLK	HONOLULU	TUCSON
SAN FRANCISCO	OKLAHOMA CITY	HUNTSVILLE	TULSA
SEATTLE	SALT LAKE CITY	JACKSON, MS	WACO
ST LOUIS	SAN ANTONIO	JOHNSTOWN	WICHITA
TAMPA	SAN DIEGO	KNOXVILLE	WILKES BARRE
WASHINGTON, DC	WEST PALM BCH	LEXINGTON	YOUNGSTOWN

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