

# Super Bowl LI

TV & Social Media Advertising Review 2017

*Market Track, Competitrack's parent company, takes an in-depth look into this year's Super Bowl advertising, including TV ad spend, creative messaging, and campaign integration with social & digital marketing channels*



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

# Integrating TV & social media

## Top National Super Bowl Advertisers

## Top Brands & Estimated TV Spend

- **T-Mobile** - \$30 million\*   
- **Alpha Romeo** - \$20 million
- **84 Lumber** - \$15 million   
- **Bud Light** - \$15 million\*   
- **Ford** - \$15 million  
- **Tide** - \$15 million  
- **20th Century Fox** - \$10 million\*   
- **Audi** - \$10 million\*  
- **Budweiser** - \$10 million\*   
- **Buick** - \$10 million\*   
- **Comcast Cable** - \$10 million
- **Google** - \$10 million 
- **H&R Block** - \$10 million  
- **Honda** - \$10 million\*   
- **Hulu** - \$10 million   
- **Kia** - \$10 million\*   
- **King's Hawaiian** - \$10 million 
- **Paramount Pictures** - \$10 million\*   
- **Sprint** - \$10 million   
- **Tiffany & Co.** - \$10 million   
- **Universal Pictures** - \$10 million\*   

## Top Categories & Estimated TV Spend

- **Automotive** - \$85 million
- **Wireless Communications** - \$40 million
- **Movie/Show Trailers** - \$37.5 million
- **Beer** - \$35 million
- **Beverages (Non-Alcoholic)** - \$30 million



Indicates Super Bowl Ad was also posted to social media either before or during the game

\*Advertised during Super Bowl last year  
Source: Market Track Advertising Data (excl. Fox, Fox Sister Networks, and NFL advertising)

Super Bowl advertising extended well beyond the TV screen this year. According to Market Track's 2017 Shopper Insight Series Survey, one-third of spectators post their thoughts about Super Bowl commercials to social media during the game broadcast. This level of audience attention presents a huge opportunity for Super Bowl TV advertisers to build their brand engagement with consumers across multiple marketing channels.

Of the 62 brands that advertised during Super Bowl LI, 92% integrated their TV ad campaign into social media. Top advertisers like T-Mobile, Bud Light, and 84 Lumber all invested at least an estimated \$15 million in their TV spots during the game, and supported that investment by sharing the campaign content to Facebook, Twitter, and Instagram in the days leading up to Super Bowl Sunday.

Kia's Super Bowl ad campaign put a premium on consumer engagement. They debuted the ad on February 1<sup>st</sup> on Facebook Messenger using their "Nirobot", an interactive bot that shares product information and allows consumers to book test drives for Kia's new Niro Hybrid vehicles without going to a showroom. The ad certainly got some laughs as viewers watched Melissa McCarthy struggle to save the world, yet Kia also kept their audience engaged in-game on Twitter, using GIFs from their commercial to tweet about significant moments, including one of Atlanta's big runs and the moment the game went into overtime.



FACEBOOK  
Feb 1



INSTAGRAM  
Feb 1



TV  
Feb 5 (during game)



TWITTER  
Feb 1



TWITTER  
Feb 5 (during game)



TWITTER  
Feb 5 (during game)

Source: Market Track Advertising Data

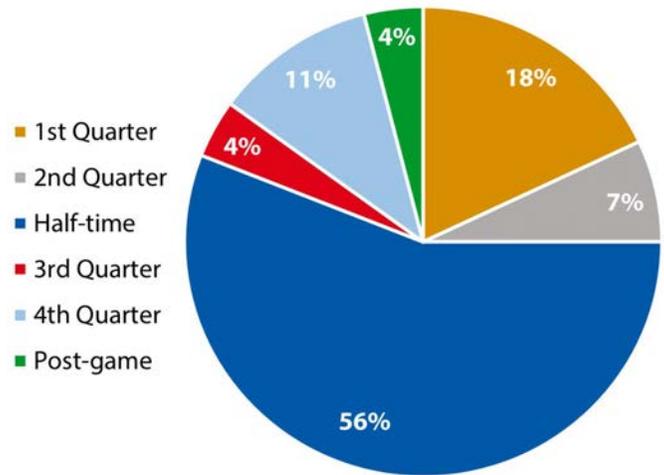
## Timing is a tactic

Advertising during the Super Bowl is a complicated decision because it is both expensive, and risky—every advertiser is at the mercy of how the game unfolds. For example, if the game is a blow out, spectators may tune out by the time the third and fourth quarters roll around. Advertisers need to consider that risk before making the substantial investment in a Super Bowl spot. This year's game was a mixed bag. It was lopsided early, but eventually became the biggest come-from-behind victory, and the first overtime game in Super Bowl history.

The figure below illustrates which advertisements aired during each quarter of Super Bowl LI. Of the 77 ads that ran during the broadcast, 36 ads ran in each half, while five aired during the halftime show. The second quarter featured 26 commercials for a total of more than 16 minutes of ad time—greater than any other quarter.

Several individual advertisers strategized against the risk posed by the results of the game. Nine advertisers had commercials air in more than one quarter of the game (including halftime), and two—Alfa Romeo and T-Mobile—had commercials air in three quarters during the broadcast. Running advertisements in multiple quarters improved their chances of reaching Super Bowl audiences, whether or not the game was competitive.

### During which quarter of the game do you usually pay the most attention to the commercials?



Source: Market Track Shopper Insight Survey

## Super Bowl LI TV Advertisers by Quarter

Quarter 1	Quarter 2	Quarter 3	Quarter 4
API (American Petroleum Institute) Busch Beer Epic War Ford Automobiles Go Daddy Google H&R Block Mexican Haas Avocado Michelin Skittles  <b>Halftime</b> 84 Lumber Comcast Cable* King's Hawaiian* Pepsi Zero Sugar* Tiffany & Co.	<b>20th Century Fox*</b> Airbnb Alfa Romeo* Bai Beverages Buick Coca-Cola Febreze Michelob Ultra <b>Paramount Pictures*</b> <b>Pepsi Zero Sugar*</b> <b>Sprint*</b> Squarespace <b>Tide*</b> <b>T-Mobile*</b> Universal Pictures Walt Disney Pictures Wargaming.net Weathertech Wendy's Wonderful Pistachios	<b>20th Century Fox*</b> <b>Alfa Romeo*</b> American Movie Classics Audi Budweiser Fiji Water It's a 10 Kia Mr. Clean Netflix <b>Paramount Pictures*</b> Persil Snickers <b>T-Mobile (2)*</b> Top Games USA  *Brands with ads in more than one quarter.	<b>Alfa Romeo*</b> Amazon (3) Bud Light <b>Comcast Cable*</b> <b>Hulu*</b> KFC <b>King's Hawaiian*</b> Mercedes Benz Nintendo Proactiv Solution Samsung SoFi Social Finance <b>Sprint*</b> Sprite <b>Tide*</b> <b>T-Mobile*</b> Turkish Airlines Wix.com

Source: Market Track Advertising Data (excl. Fox, Fox Sister Networks, and NFL advertising)

# Maximizing campaign reach

## Febreze Cross-Channel Media Advertising

Super Bowl LI

TV  
Jan 26



ONLINE VIDEO  
Jan 26



ONLINE DISPLAY  
Jan 27



TWITTER  
Jan 30



MOBILE  
Jan 26



FACEBOOK  
Jan 26



PRINT  
Jan 29

Source: Market Track Advertising Data

Although the Super Bowl is historically a TV-centric event, many brands attempted to maximize their reach by delivering their message through various marketing channels. Hoping to attract the attention of consumers before the big game, Febreze got an early start on their Super Bowl advertising by advocating preparation. Centered around the “Halftime Bathroom Break”, both their TV and online video ads launched on January 26<sup>th</sup>, encouraging viewers to get their bathrooms “Super Bowl-ready”. Both videos showed Super Bowl parties and the anticipation of waiting until halftime to use the restroom, asking viewers if their restroom is prepared. Febreze also began advertising the same message on the same day in

a Facebook post, encouraging consumers to “tackle offensive odors” during the Halftime Bathroom Break with their Febreze Small Spaces product. On January 29<sup>th</sup> they offered a buy one, get one free coupon on their products, with a message to “get your throne halftime ready”, showcasing a bathroom adorned with Super Bowl gear. On January 30<sup>th</sup> they teamed up with Charmin on Twitter to humorously show the travesty of not having both products during a Super Bowl bathroom break.

No matter the channel, Febreze kept asking shoppers if their bathroom was “Halftime Ready”, which they called out in their January 26<sup>th</sup> mobile advertisement and on January 27<sup>th</sup> in an online display ad.

## What devices are you typically using while watching TV? (Select all that apply)



Source: Market Track Shopper Insight Survey

## Taking Action: Super Bowl LI "By The Numbers"

The insight in this report highlights key advertising tactics that companies from an array of industries used to drive engagement with their brand during the largest TV viewing event in the US. These insights, particularly the integration of TV ad campaigns with social and digital marketing efforts, should be incorporated into your ad planning for other calendar events throughout 2017 and beyond. Here is one final look at some of the numbers that defined the advertising landscape for Super Bowl this year:

### **48.8** overnight TV rating

According to Nielsen, Super Bowl LI netted a 48.8 overnight rating, down only slightly from 49.0 in 2016. The Super Bowl remains the largest single television broadcast event in the US, providing a unique opportunity for brands to gain incomparable exposure through TV advertising.

### **92%** integrated with social media

More than nine out of every ten Super Bowl TV advertisers integrated their TV ad campaign with their social media sites either before or during the game. This enabled brands to enhance their engagement with Super Bowl spectators. Social marketing has become a staple of Super Bowl campaigns, regardless of industry.

### **\$462.5** million in TV ad spend

Estimated TV ad spend grew to over \$460 million, up from an estimated \$440 million in 2016. This year, 21 brands spent at least an estimated \$10 million on TV spots for Super Bowl LI.

### **62** unique brands advertised

Over 60 brands advertised during Super Bowl LI—24 returned from last year's broadcast. T-Mobile led all brands with four total spots throughout the game, at an estimated cost of \$30 million in ad spend.

### **77** unique TV commercials

Spectators who watched the full game took in 77 commercials between the four quarters and halftime. Combined, Super Bowl 2017 ads made up nearly 46 minutes of air time. There were over 23 minutes of commercials in the first half, compared to 19 in the second half, and just under four minutes during halftime.

### **35** categories advertised

The Super Bowl yet again featured a wide array of TV advertisers, from airlines, to hair care, to mobile gaming brands. There were 35 different categories advertised during the broadcast—automotive brands led them all with an estimated \$85 million in combined TV ad spend.

Contact your account representative for more information or email us:  
[insights@markettrack.com](mailto:insights@markettrack.com)