



## Press Information

For interview requests and queries:

Bill Daddi  
Daddi Brand Communications  
212-404-6619  
917-620-3717  
Bill@DaddiBrand.com

### **TNS MEDIA COMBINES RESEARCH TO PROVIDE SUPER BOWL AD FACT-PACK**

**Highlights include ad pricing trends; the influx of new advertisers; more cluttered air time; the impact on commercial audiences; and the buzz generated in social media**

**New York, NY, January 8, 2009** – As Super Bowl XLIII on February 1 approaches, it's more than just sports fans who are eagerly looking forward to the game. For millions of consumers, the TV commercials that will appear during the game are also the subject of growing anticipation. And participating advertisers will once again be 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,” said 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) have again 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 is reportedly seeking \$3.0 million for each 30-second spot. If this pricing level is achieved, total in-game ad revenue should exceed \$200 million for the first time.

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

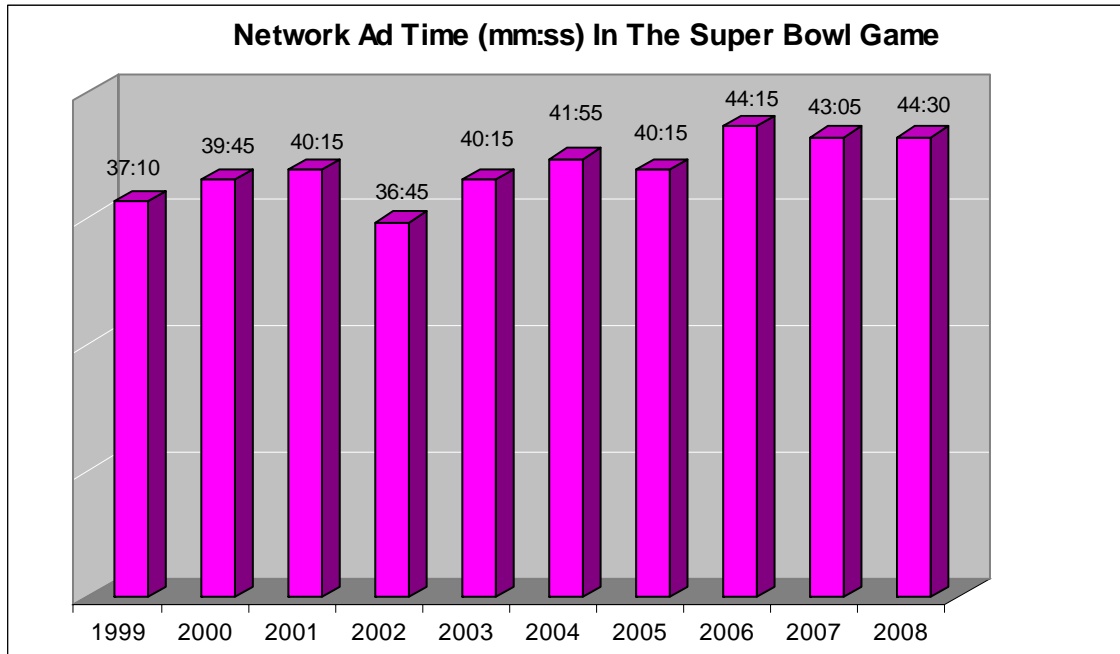
In recent years, **first-time Super Bowl advertisers have been a significant presence**, steadily accounting for 20-25% of the companies that buy ad time. On the one hand, it indicates that a number of marketers do not return to the game which could be construed as a sign of weakness for the event. On 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.

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

With the announced withdrawals from the 2009 game by perennial sponsors General Motors and Federal Express, it remains to be seen which marketers take their place.

### 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 past three games now occupy the top three spots in terms of all-time Super Bowl ad clutter.



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	
Pre-Game	101
First Half of Game	101
Half-Time of Game	99
Second Half of Game	99
Post-Game	85
Avg. Primetime Show	90
<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 ten 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.

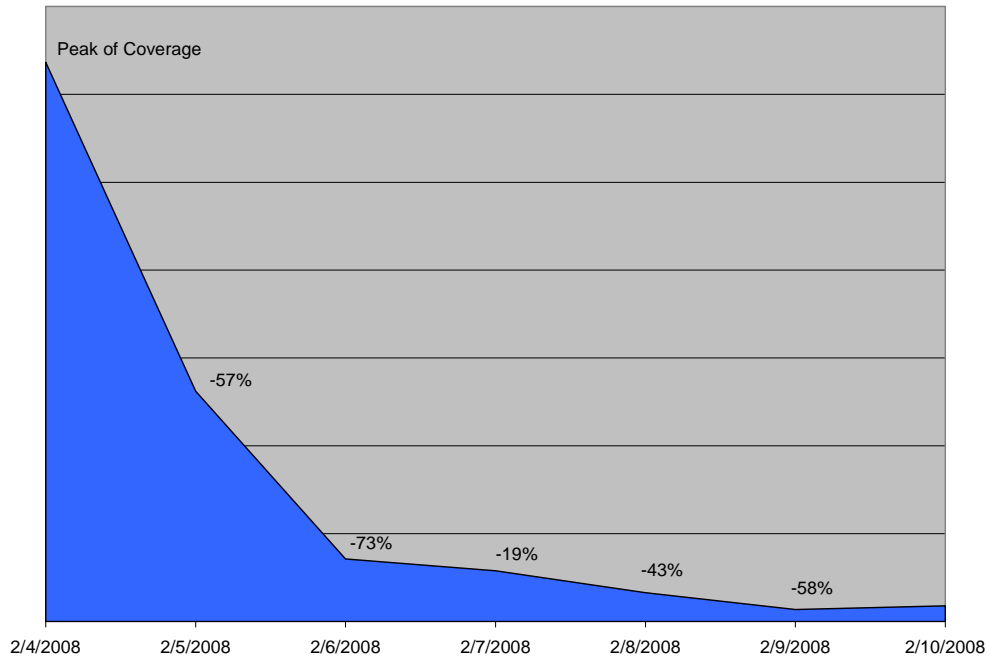
Top 10 Brands in 2008 Super Bowl Ranked on Total Media Coverage (includes Traditional and Social media)			
1.	Pepsi	6.	Doritos
2.	Anheuser-Busch	7.	GoDaddy.com
3.	Coca-Cola	8.	Victoria's Secret
4.	Bridgestone	9.	E*Trade
5.	Audi	10.	Planters
<i>Source: TNS Cymfony</i>			

For the 2009 game, Pepsi has 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 the 2008 Super Bowl Ads Peaked The Next Day**



Source: TNS Cymfony

#### **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)