

The background of the slide features a large, stylized 3D rendering of the Vince Lombardi Trophy. The trophy is positioned centrally, with the football at the top and the NFL shield logo on the base. Behind the trophy, the Roman numerals 'LVIII' are displayed in a large, bold, 3D font. Below the numerals, a horizontal bar contains the words 'SUPER BOWL' in a smaller, sans-serif font. The entire scene is set against a dark, cloudy sky.

Super Bowl 2019 Post-Game Ad Wrap-up

ACE
metrix

FEBRUARY 3, 2019

Highlights

- SB 2019 ads **packed an emotional punch**, engaging viewers with messages that were humorous, heartfelt, ingenious, and sometimes even eerie or confusing – but *rarely boring*
 - Evoking strong emotions can stimulate high levels of **Breakthrough**, with humor, heart, and ingenious all exhibiting a positive Breakthrough relationship
- Celebs were out in force, as always, and many brands broadened the appeal of their ads by using **multiple celebrities with complementary demographic appeal**
- The volume of ads with **female leads** picked up significantly vs. last year, as brands sought to leverage a theme of empowerment and equality
- Unlike two years ago, ads with **political undertones were scarce** in 2019, as brands explored lighter-hearted messages to strike unity with viewers



Super Bowl 2019 Advertising

Insights from 10 Years of Creative Measurement

Methodology: What's a Super Bowl ad?

All ads that air **nationally** on **TV** between kick-off and the end of the game (i.e., **whistle-to-whistle**) with the **exception** of movie trailers and television promos are considered **Super Bowl ads**

This report includes ads **dating back to 2010**, when Ace Metrix started measuring Super Bowl ads – **10 years total**

By the Numbers:

2019 Super Bowl

Number of Brands: 43

Number of Ads: 54

Total Ace Metrix Sample Size: ~28,000

Total Ad Time: 36.5 min.

Max Ace Score: 705

Min Ace Score: 310

Avg. Super Bowl Year

Number of Brands: 42

Number of Ads: 53

Total Ace Metrix Sample Size: ~27,500

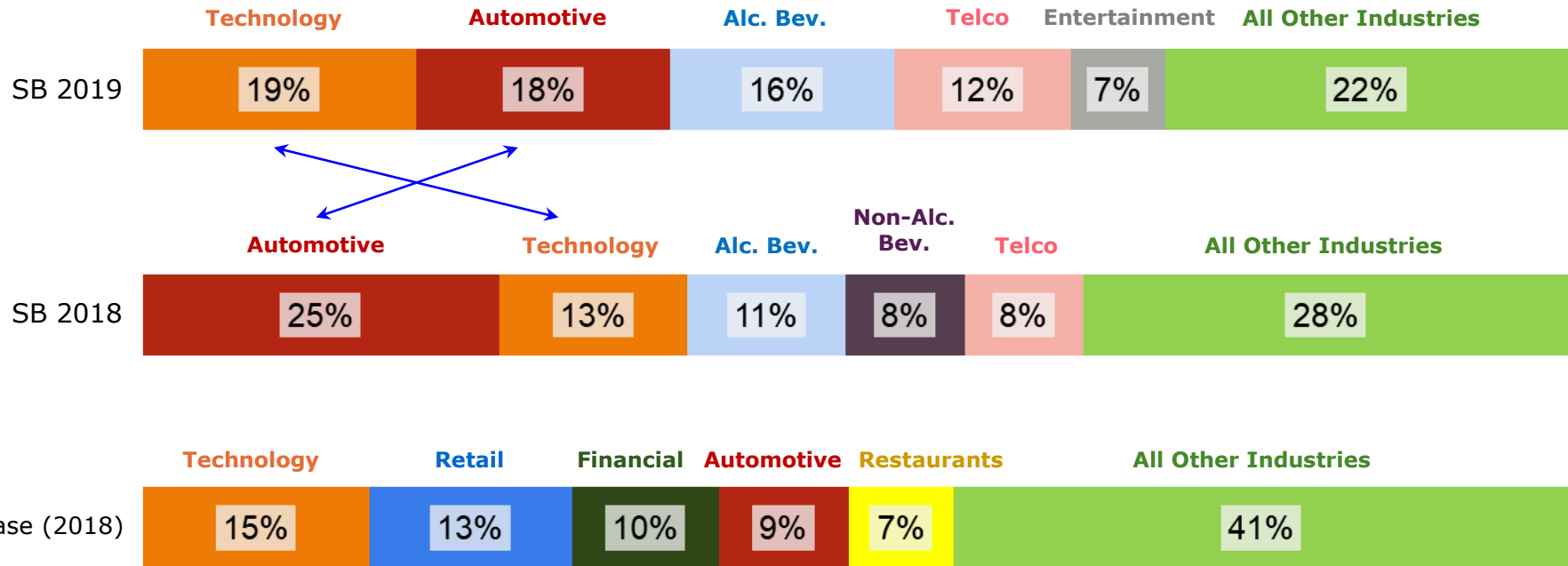
Total Ad Time: 35.5 min.

Max Ace Score: 680

Min Ace Score: 386

Automotive was not the top advertising industry in Super Bowl 2019, taking a back seat to Technology

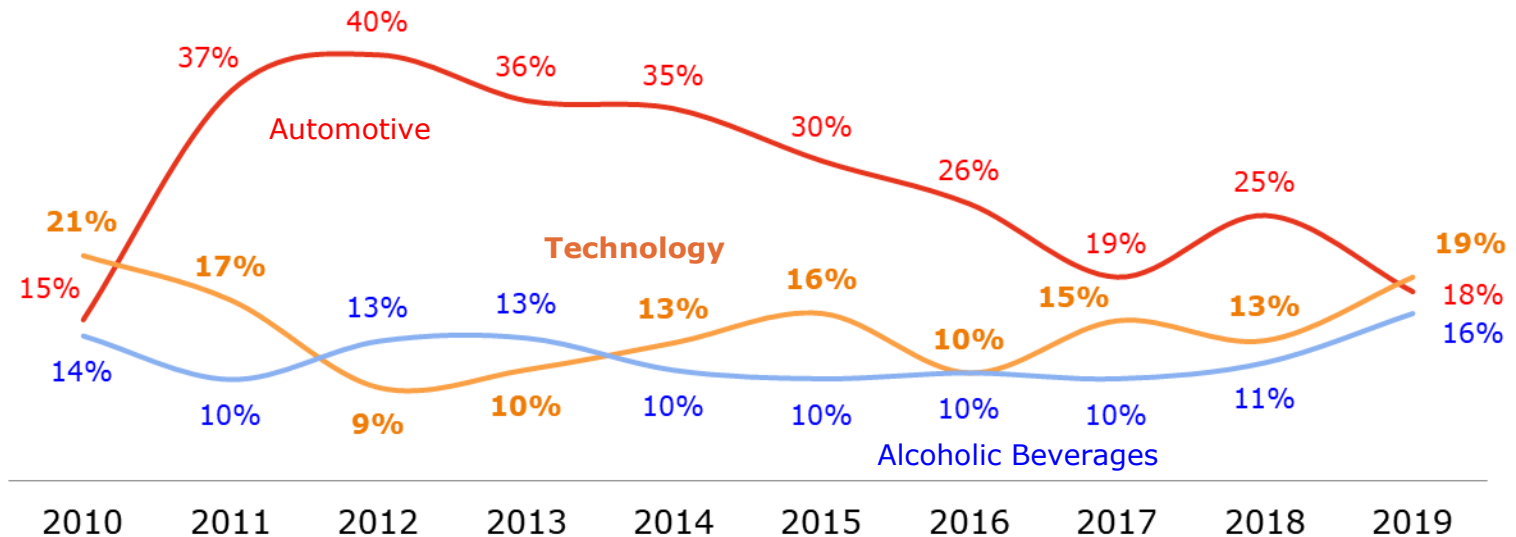
Ad Share by Industry as a Percent of Total Ad Duration



Automotive category's share of Super Bowl advertising has been in decline for several years

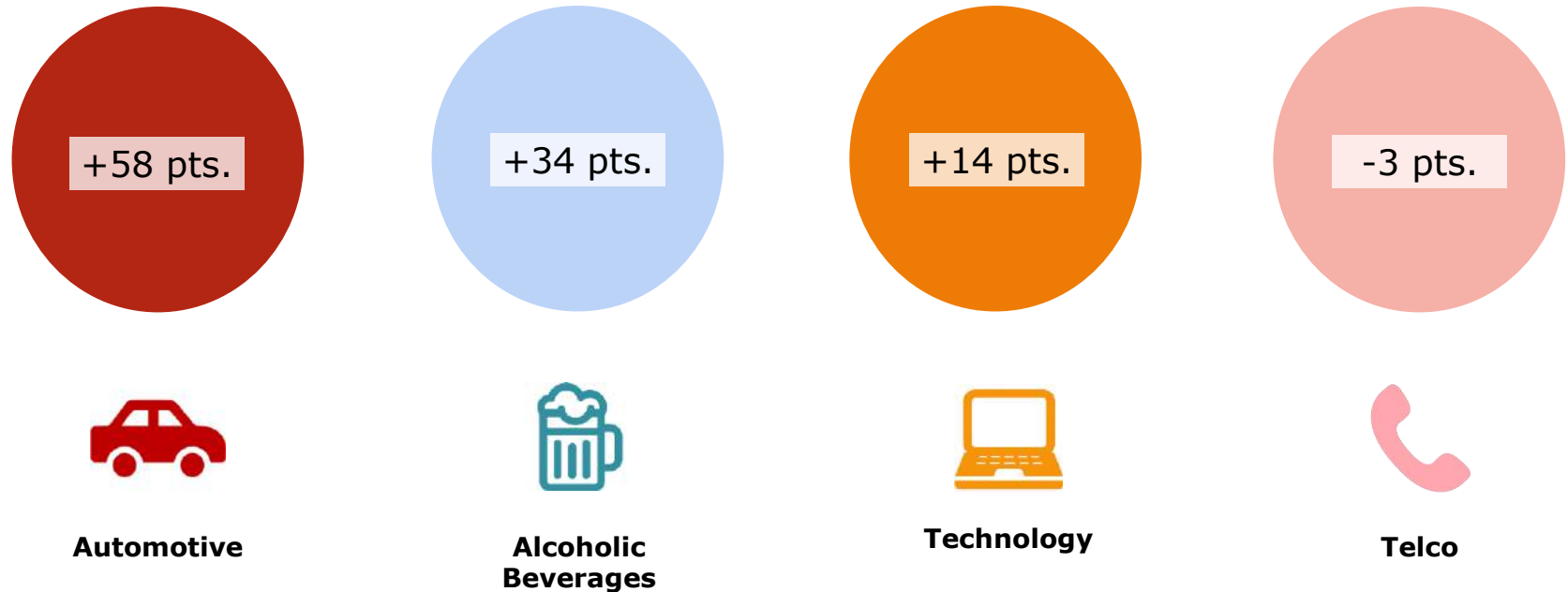
Super Bowl Ad Share

Automotive, Technology, and Alcoholic Beverages
as a Percent of Total Super Bowl Ad Duration by Year



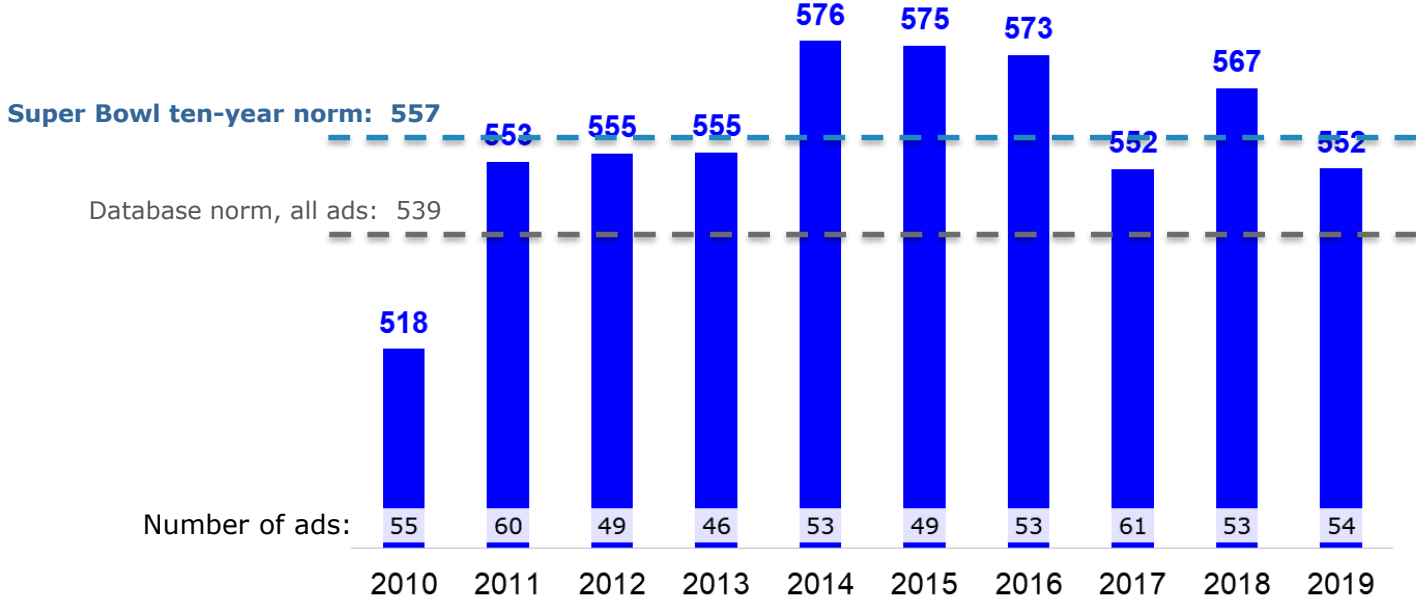
Among the top four industries, this year's Auto ads performed the best relative to overall category norms

Average Super Bowl 2019 Ace Score Gap-to-Norm



Ace Scores of 2019 Super Bowl ads retreated from the 2018 level

Average Ace Score of Super Bowl Ads by Year



We've classified respondent-level verbatims into 57 distinctive Emotions across 21 Emotional Lenses

Topic	Brand	Brandtastic Brandtastic	Brandfail Dishonest Incredulous	Conscience Green Philanthropy Corpres	Credible Authentic	Lens Emo		
	Product	Striking Cool Upscale	Healthy Healthy	Prodtastic Prodtastic	Helpful Convenient			
	Production	Adfail Dislike, Tired, Sexist, Boring, Waste Of, Frenetic	Visceral Soothing, Surreal, Audio, Cinematic, Colorful	Craving Thirsty Yummy	Hook Arresting Exciting Curiosity Energetic		PG-13 Risqué Sexy	Adtastic Adtastic Love It
	Message	Unconventional <u>Ingenious</u> , Quirky, Left field, Memorable	Heart Cute, Powerful, Nostalgic, Wholesome, <u>Heartfelt</u> , Inspiring, Narrative	Logical Convincing Learning Clear And Concise	Hate Irkesome, Gross, <u>WTF</u> , Preachy, Awful, Mean, <u>Eerie</u>		Sensible Value	Humor <u>Funny</u>

2019's Super Bowl ads packed a strong emotional punch

Heartfelt

Google

verizon

Microsoft

28% of 2019 SB ads

vs. 12% of all ads

Ingenious



33% of 2019 SB ads

vs. 18% of all ads

Eerie

intuit
turbotax.

mintmobile Colgate

35% of 2019 SB ads

vs. 17% of all ads

Funny

Top
Emo



59% of 2019 SB ads

vs. 25% of all ads

*Super Bowl ads are trying to accomplish **different objectives** – some entertaining, some heartfelt, and others pushing specific products. Trying to measure all ads by the same metric doesn't say whether they were **successful in their own right**.*

WTF



31% of 2019 SB ads

vs. 13% of all ads

Monday-Morning Quarterbacks: As usual, there was some negative feedback to this year's crop of Super Bowl ads

SUPER BOWL ALERT: BIG GAME DELIVERS BORING COMMERCIALS, LOW VIEWERSHIP

The audience looks to be the lowest in a decade, and the ads didn't fare much better

AdAge, February 4, 2019

But actual viewers tend to have very different responses to TV commercials than journalists and other media professionals.

By analyzing verbatims collected from **hundreds of thousands of survey respondents** we can form a more objective picture of how **real viewers** felt about this year's Super Bowl ads compared to prior years' Super Bowl ads, and compared to **video advertising in general** ...

The Super Bowl commercials were really bad this year, huh?

The 2019 ads weren't for products so much as capitalism itself — precisely at a time when skepticism in capitalism is growing.

By Todd VanDerWerff | @tvoti | todd@vox.com | Feb 4, 2019, 12:10am EST

Vox, February 4, 2019

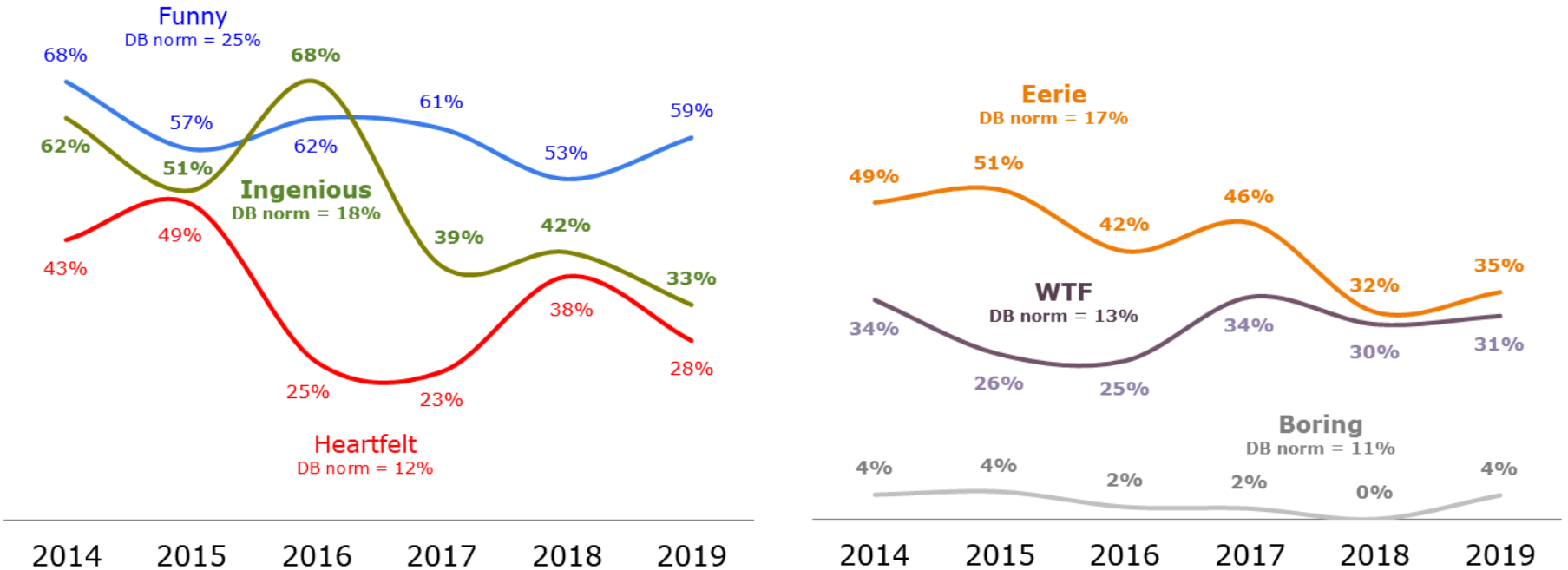
Why This Year's Super Bowl Ads Were 'Meh'

Wharton School, February 5, 2019

Emotions ebb and flow by Super Bowl year, but they tend to be *strong*, while the ads are *rarely boring*

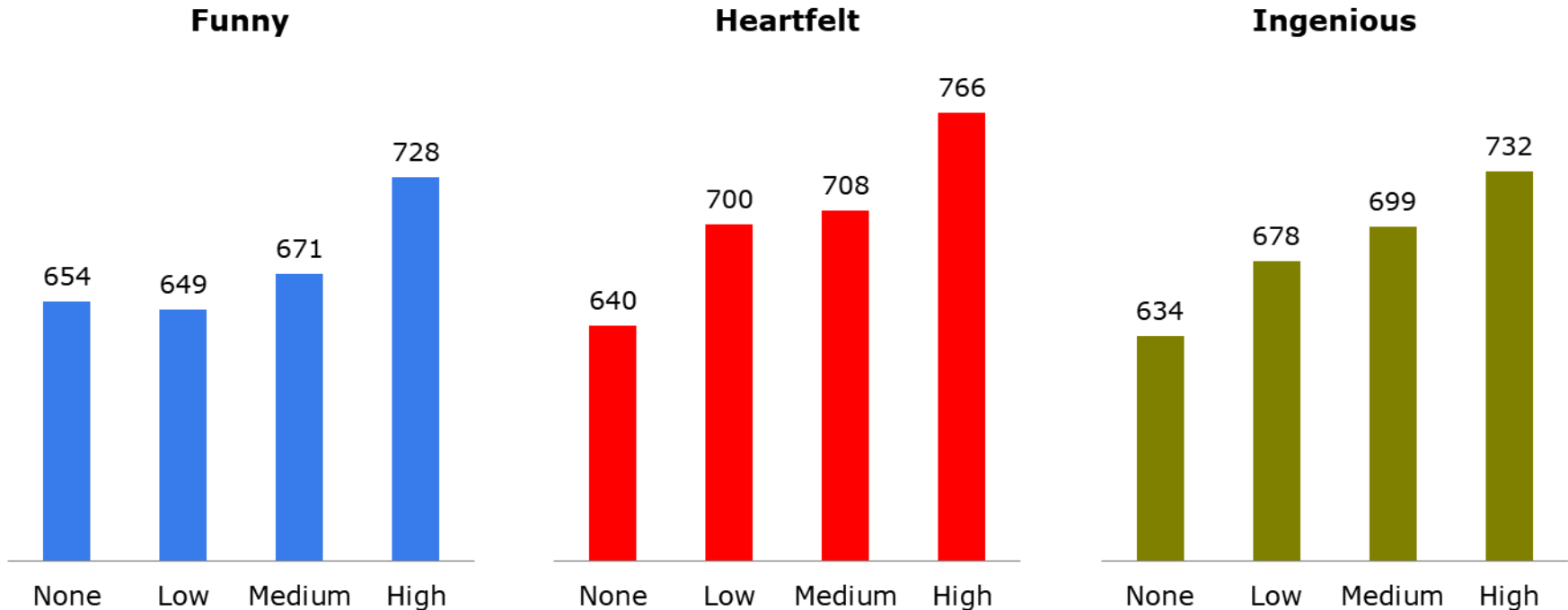
Percent of Super Bowl Ads that Registered an Emotional Signal by Year and Emotion

Database norms (~50,000 ads) Shown in Text below Each Emotion



Super Bowl ads with higher levels of **Funny**, **Heart**, and **Ingenious** have tended to achieve stronger Breakthrough ...

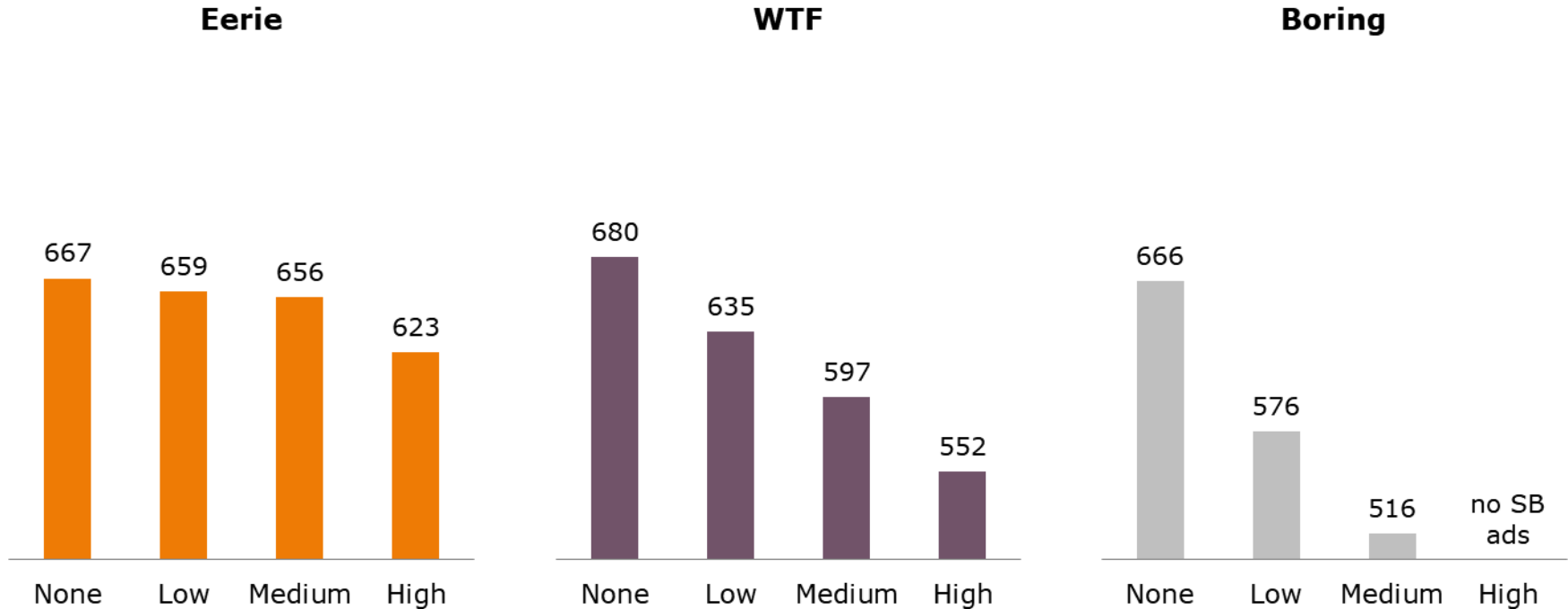
Average Breakthrough Score by Strength of Emotional Signal



Emotional Signal bands: None = Emo Quantile 0; Low = Emo Quantiles 32 to 34; Medium = Emo Quantiles 37 to 55; High = Emo Quantiles 66 to 100

... while those that spark more **Eerie**, **WTF**, and **Boring** responses have suffered lower Breakthrough on average

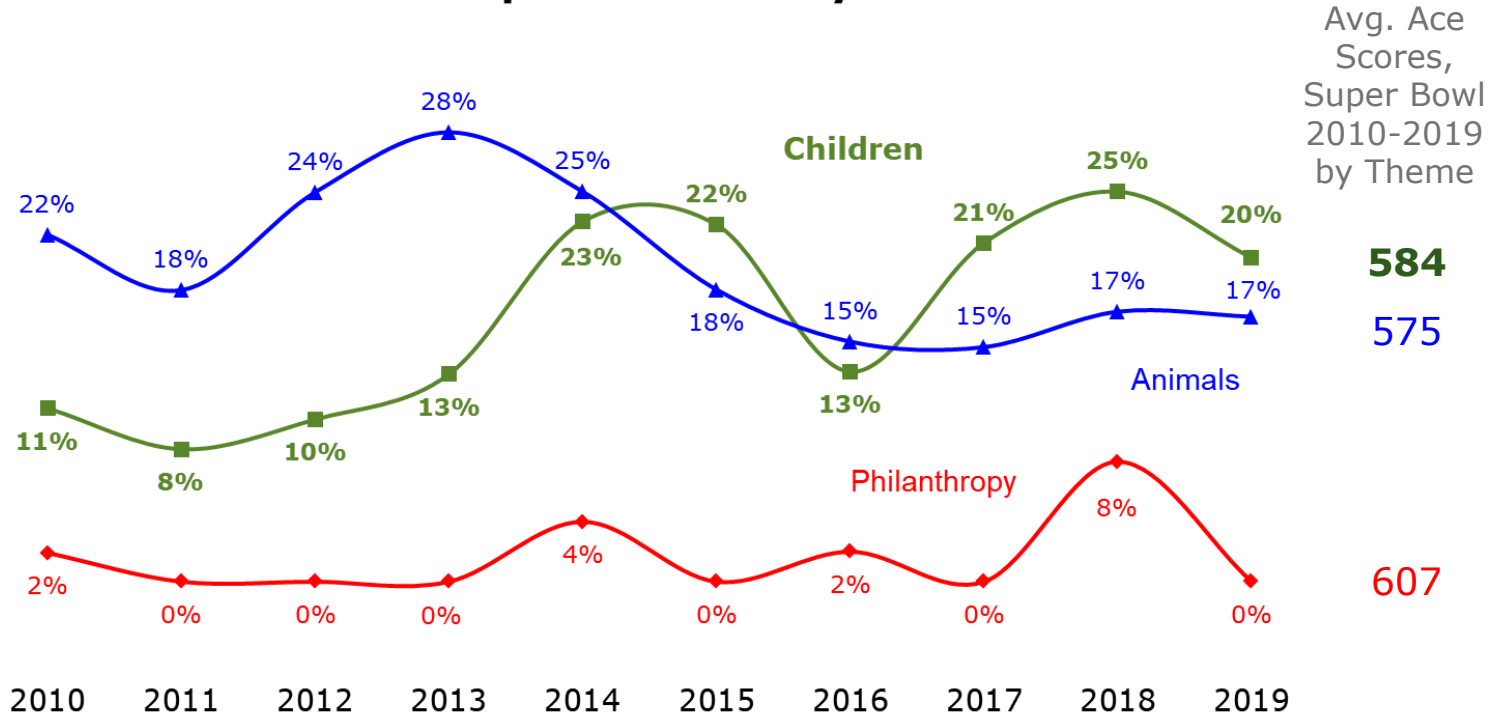
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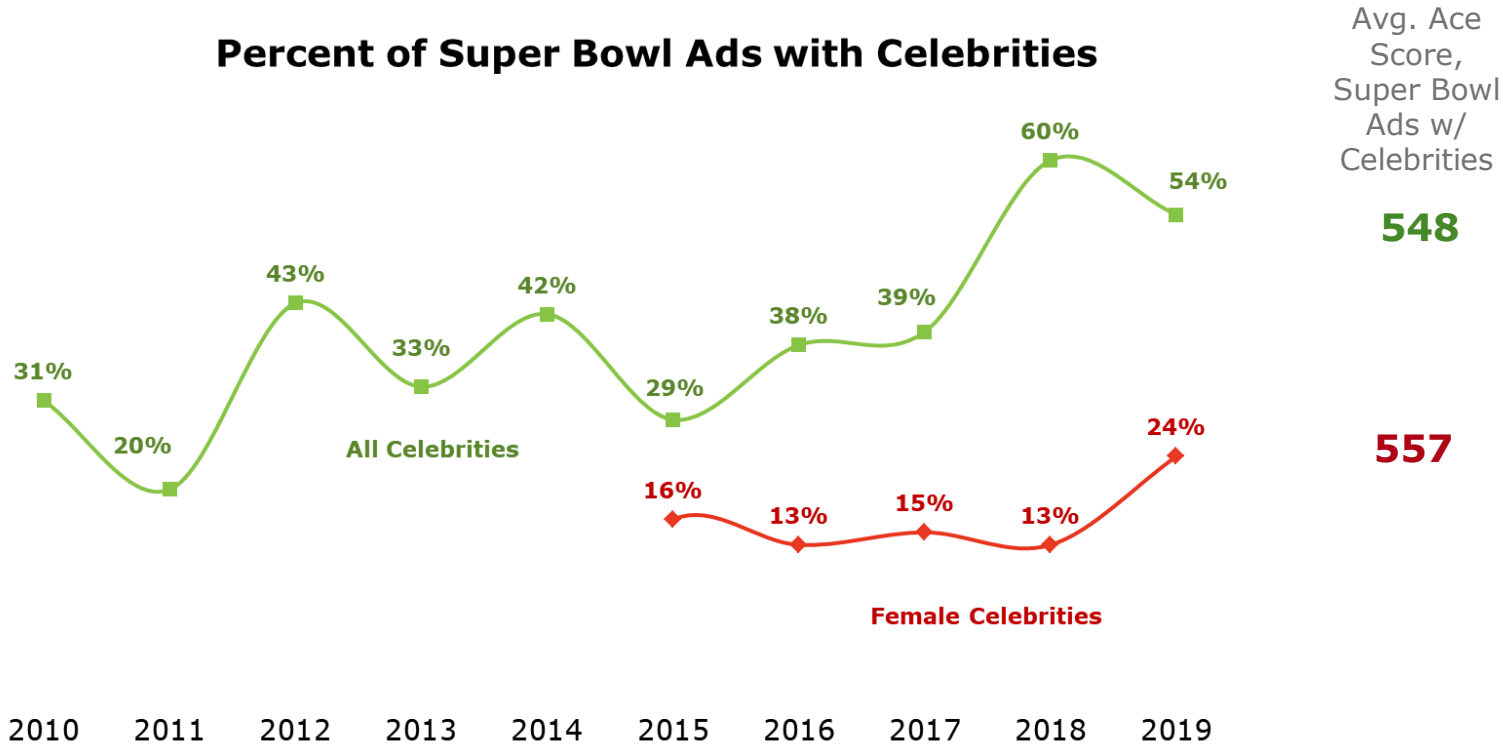
Philanthropy ads disappeared in 2019, while other creative themes held relatively steady year/year

Percent of Super Bowl Ads by Creative Theme



Celebrity appearances declined slightly in SB 2019, but **Female celebs** were up significantly vs. 2018

Percent of Super Bowl Ads with Celebrities



2019 Super Bowl Celebrity Name Resonance

2019 Super Bowl Celebrities:
Percent of Verbatims in Which Selected Celebrities Were Mentioned by Name



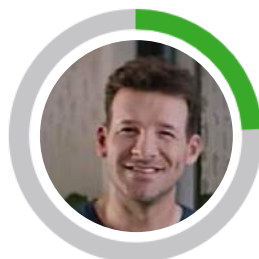
ADT
Property Brothers
(14%)



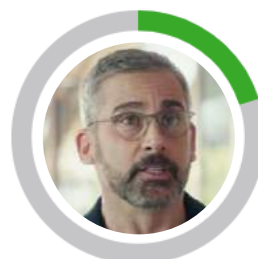
Bumble
Serena Williams
(13%)



Bubly
Michael Bublé (12%)



Skechers
Tony Romo (12%)



Pepsi
Steve Carell (10%)



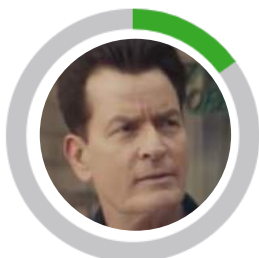
Doritos
Backstreet Boys
(10%)



Hyundai
Jason Bateman (9%)



Pepsi
Cardi B (8%)



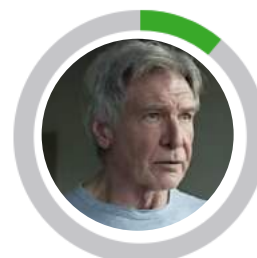
Planters
Charlie Sheen (8%)



Doritos
Chance The Rapper
(8%)



M&M's
Christina Applegate
(6%)



Amazon
Harrison Ford (6%)



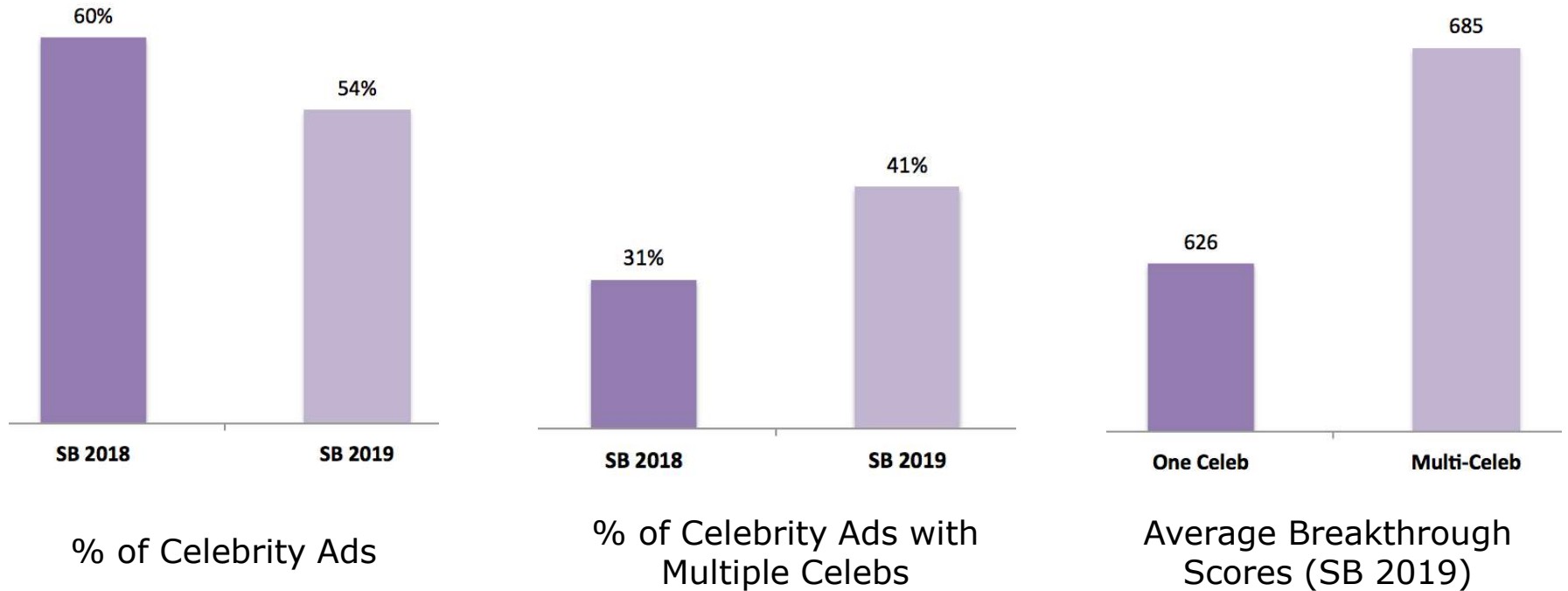
Four Trends That Emerged from 2019's Super Bowl Ads



2019 Super Bowl Trends:

#1 Brands Extend Their Reach with Multiple Celebrities

Multi-celebrity ads increased in SB 2019 vs. last year



Celebrity pairs that complement each other can help brands achieve broad demographic appeal



Amazon

Celebrities: Forest Whitaker, Harrison Ford, Broad City Stars, and the Nasa Twins

Single Best Thing:
Characters (22%)



Polarity Percentile: 6th



Doritos

Celebrities: Chance The Rapper and the Backstreet Boys

Single Best Thing:
Characters (20%)



Polarity Percentile: 7th



Pepsi

Celebrities: Steve Carrell, Cardi B, and Lil Jon

Single Best Thing:
Characters (43%)



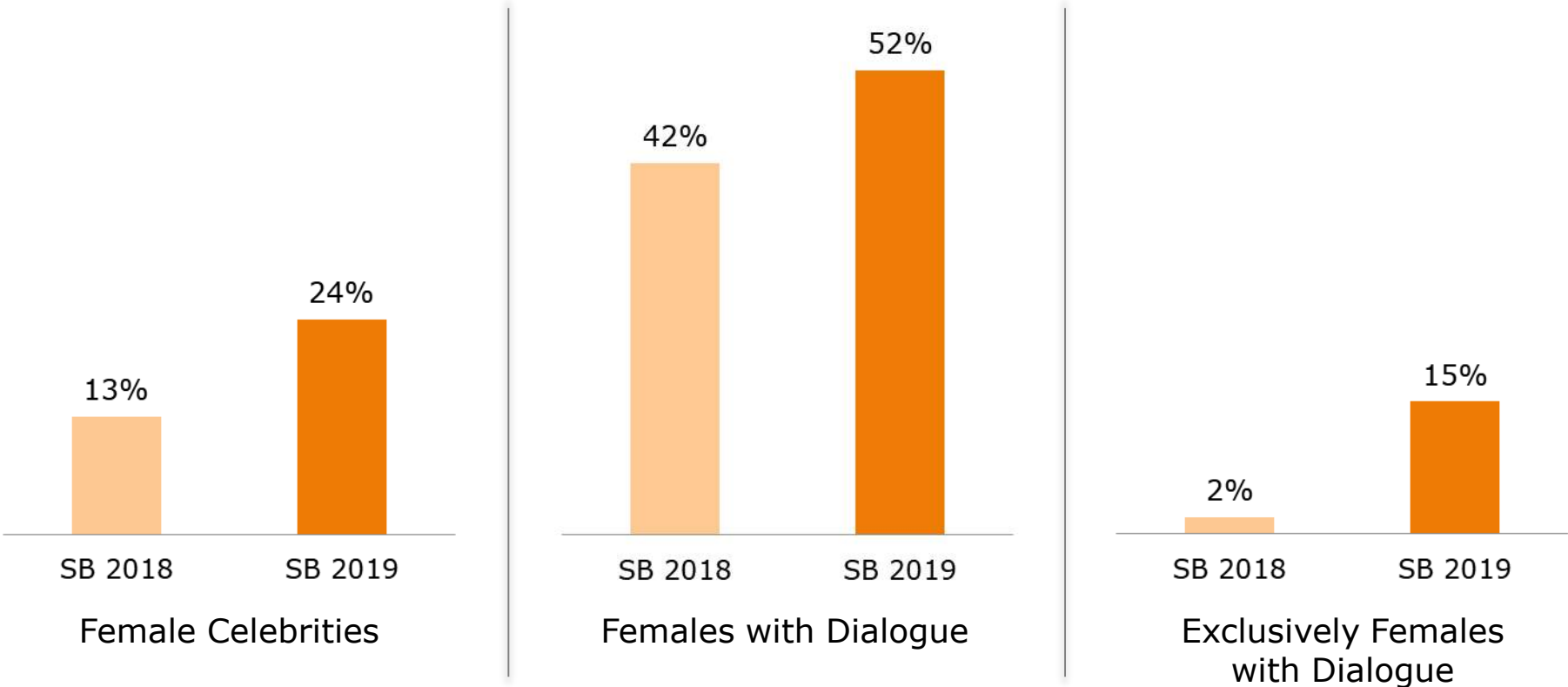
Polarity Percentile: 20th



**2019 Super Bowl Advertising Trends:
#2 Females Take Center Stage**

The female-forward approach was evident in SB 2019

Percent of 2018 and 2019 Super Bowl Ads, by Female Role



Ads from a cross-section of industries leveraged female leads to communicate messages of empowerment and equality

 bumble



Category – Websites
Ace Score – 553
Breakthrough – 636
Top Emotion – Powerful

 m&m's



Category – Candy and Gum
Ace Score – 643
Breakthrough – 738
Top Emotion – Funny

 Michelob
ULTRA



Category – Beer
Ace Score – 489
Breakthrough – 602
Top Emotion – But

 Olay



Category – Skin
Ace Score – 518
Breakthrough – 656
Top Emotion – Curiosity

 BON & VIV



Category – Malt Beverages
Ace Score – 520
Breakthrough – 624
Top Emotion – Surreal

 TOYOTA



Category – Non-Luxury Auto
Ace Score – 596
Breakthrough – 682
Top Emotion – Narrative

 TURKISH
AIRLINES



Category – Airlines
Ace Score – 460
Breakthrough – 577
Top Emotion – Curiosity

 Wix.com



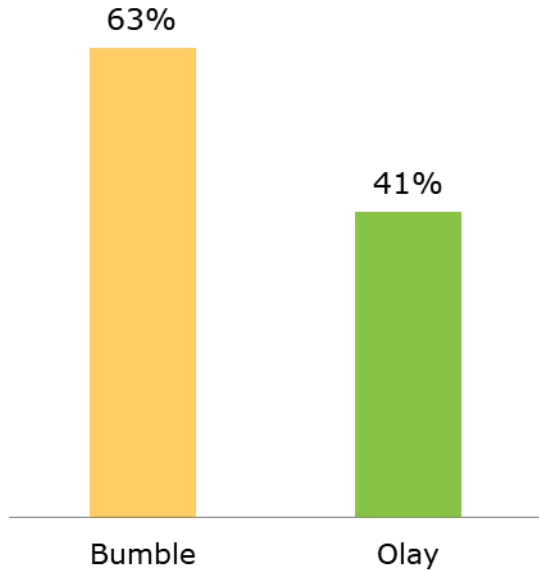
Category – Websites
Ace Score – 478
Breakthrough – 558
Top Emotion – But

Bumble's ad with Serena had a more favorable gender-equality profile than Olay's funny slasher-parody spot

... but both ads connected emotionally and broke through among female viewers

I think highly of the way women are presented in the ad

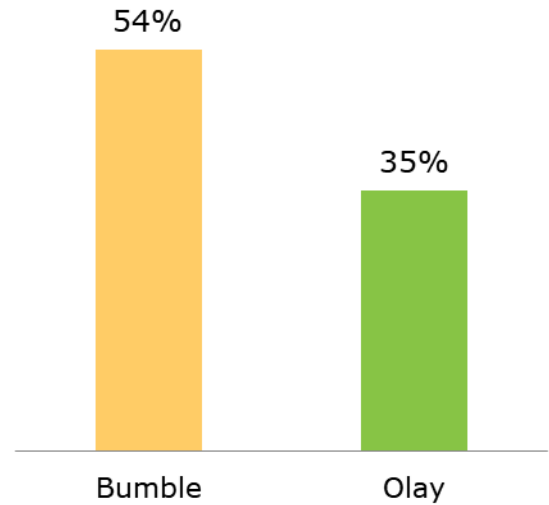
% of Viewers Who Completely Agree



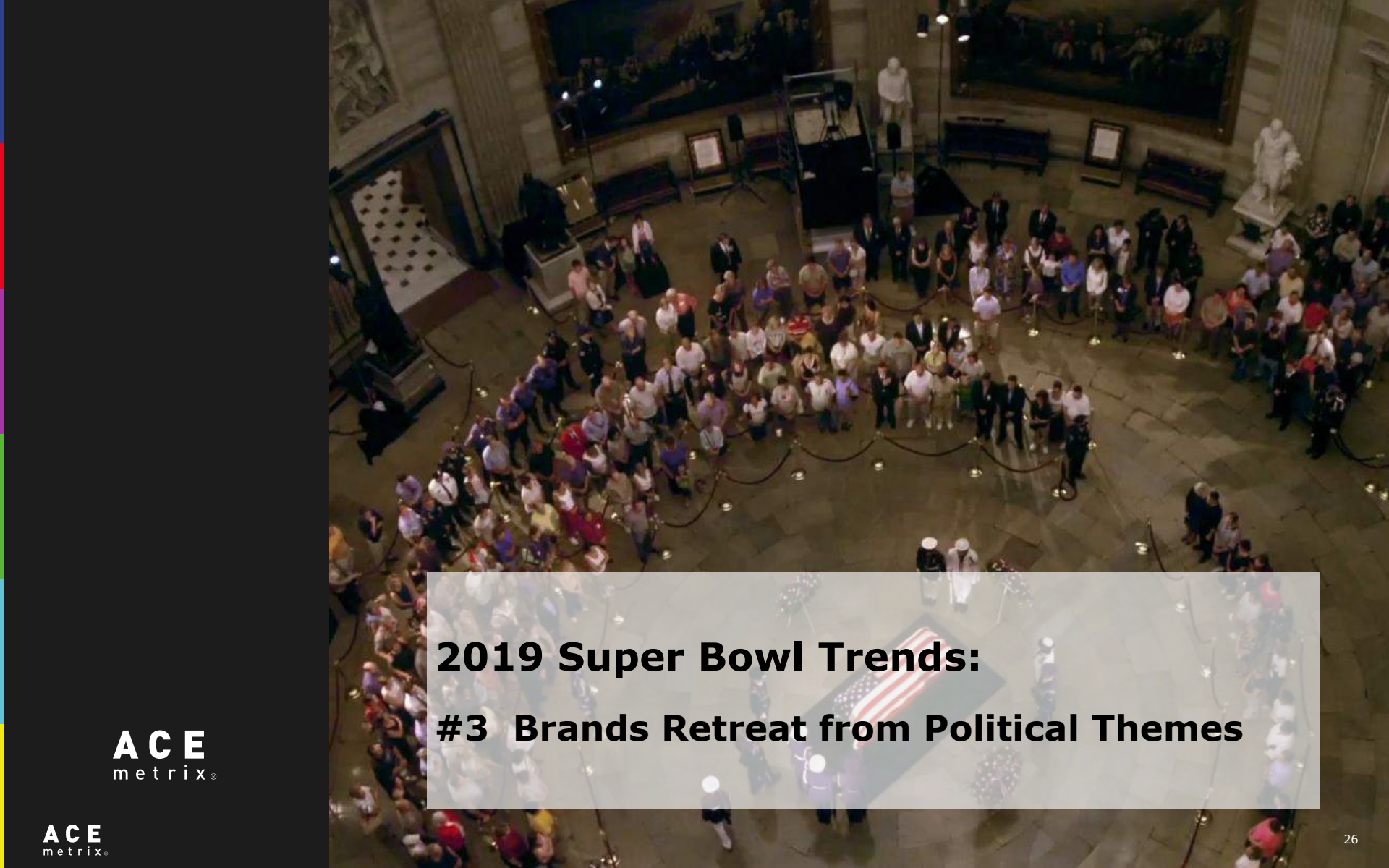

Bumble - "The Ball Is in Her Court" (0:30)
Breakthrough: 636 (GenPop); 677 (Females)
Single Best Thing: Characters (25%)
#1 Emotion: Powerful (top 4% of all ads)

Women in the ad are good role models for other women and young girls

% of Viewers Who Completely Agree



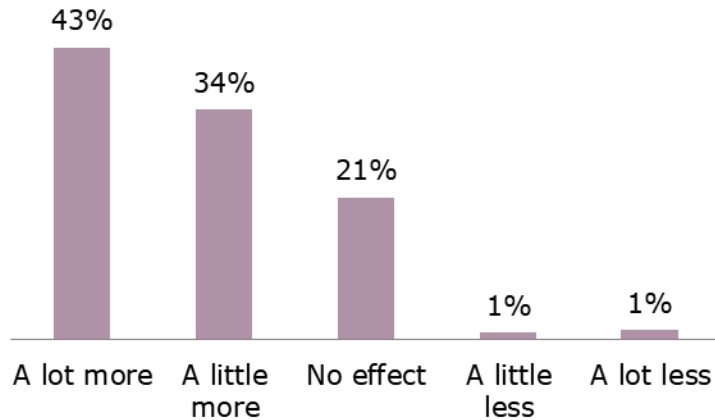

Olay - "Killer Skin" (0:30)
Breakthrough: 656 (GenPop); 667 (Females)
Single Best Thing: Visuals (25%)
#1 Emotion: Curiosity (top 2% of all ads)



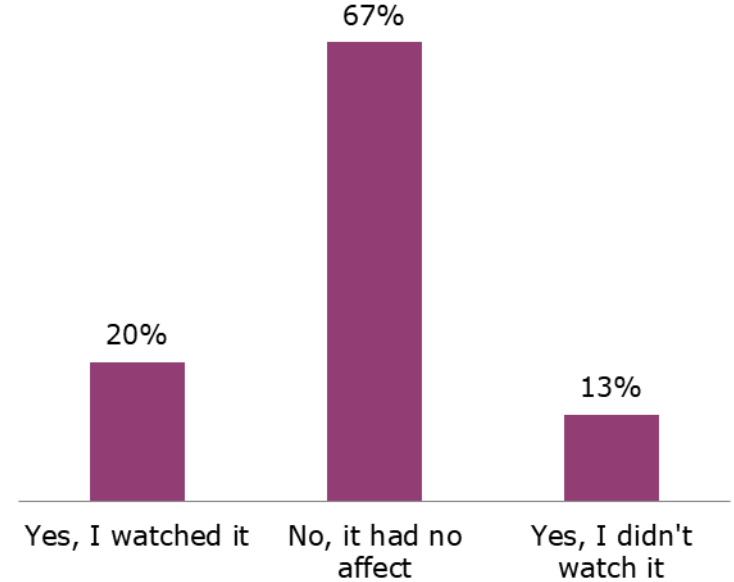
**2019 Super Bowl Trends:
#3 Brands Retreat from Political Themes**

Americans believe the NFL has become more politicized – and this has had an effect on Super Bowl viewership

To what extent has the NFL become politicized?



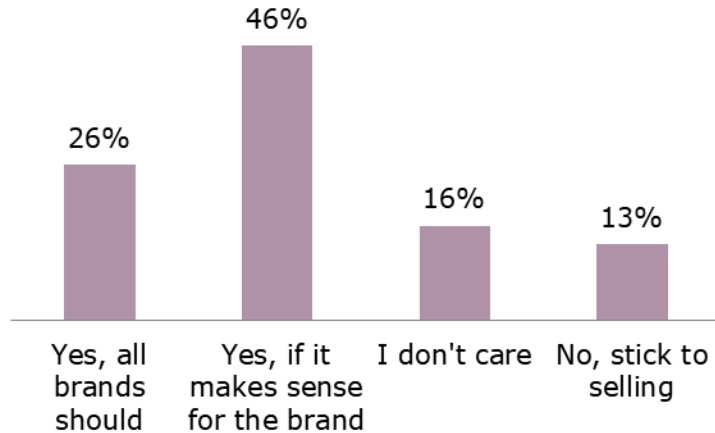
Did politics affect your viewing of this year's Super Bowl?



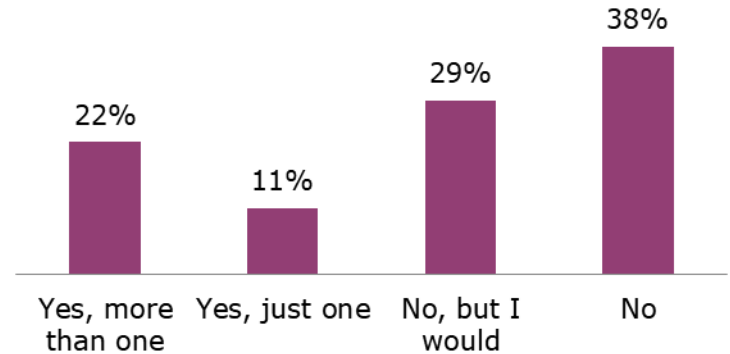
Based on 2,074 responses to Ace Metrix LIVE surveys conducted on February 4, 2019.

Most viewers are comfortable with a brand taking a stance, but doing so can also lead to economic backlash

Should brands have a purpose (beyond selling products/services)?





In the last year, have you boycotted a brand because of its political/social stance?







Based on 2,074 responses to Ace Metrix LIVE surveys conducted on February 4, 2019.



Viewer feedback reflects a significant decline in political themes over the past two Super Bowls



That was then: **SB 2017**

- 


7.7%
- 


4.3%
- 


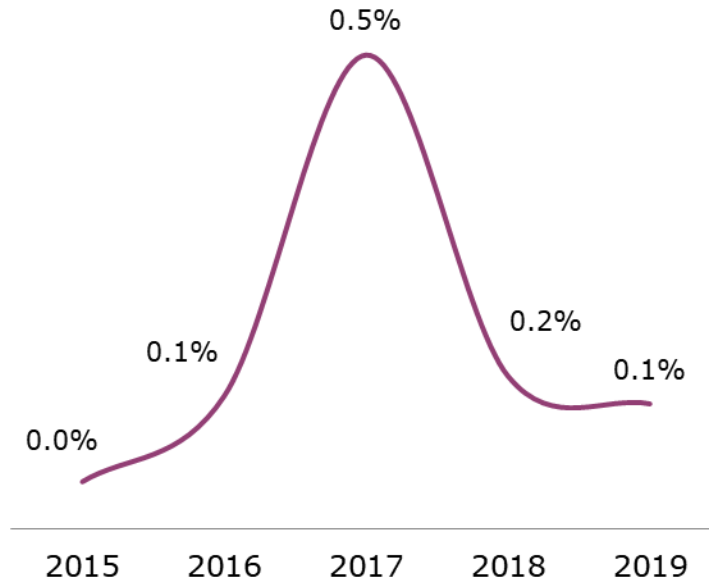
3.7%
- 


2.2%
- 



1.4%



etc. ...

Percent of Verbatims That Include Political Terms
by Super Bowl Year



This is now: **SB 2019**

- 


7.7%
- 


4.3%

Values above reflect the percentage of open-ended verbatims that include political terms: "politics", "trump", "hillary", "clinton", "conservative", "liberal", etc.



**2019 Super Bowl Advertising Trends:
#4 Brands Step Forward with a Humorous
Spin on Technology**

Light-hearted tech themes were both common and engaging in Super Bowl 2019

"RoboChild" TurboTax



RoboChild is told it can't be a TurboTax live-CPA when it grows up because it's not human – a horrifying fate

Breakthrough: 568

Top Emo: Eerie

"Not Everything Makes the Cut" Amazon

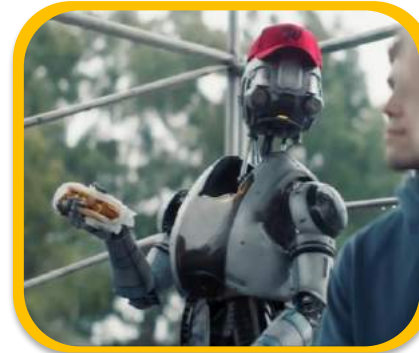


Amazon shows viewers that not everything is meant for voice-activated technology in this humorous self-parody

Breakthrough: 718

Top Emo: Funny

"Fear Is Everywhere" SimpliSafe



Robots take our jobs, drones spy on us, and other sinister twists take place in SimpliSafe's comic depiction of the world we live in

Breakthrough: 621

Top Emo: But

"Robots" Michelob Ultra



A human-like robot is a total boss at high-impact workouts, but longs for the simple joy of sipping on a beer

Breakthrough: 660

Top Emo: But

Robots, drones, and home devices – viewers can relate to our uneasy relationship with emerging technology

Amazon "Not Everything Makes the Cut"

"Really funny, entertaining and something everyone who uses Alexa can relate to. Very funny & I would watch it many times again. Such good quality should be a Super Bowl ad, or maybe it already is! — Female 36-49

"The ad was meant to be amusing but I found it annoying. Anyone concerned with privacy shouldn't be interested in an Amazon device." — Male 36-49

Michelob Ultra "Robots"

"It does a good job speaking to our feelings about technology taking over so much of our day-to-day lives." — Male 36-49

SimpliSafe "Fear is Everywhere"

"It definitely relates to how people feel about technology these days, but shows that their product is safe and reliable." — Male 50+

"Definitely can relate to feeling like technology is marching too fast, but it's kind of strange to solve it with more technology" — Female 21-35

"The scenes in the ad were funny at times and captured the general concerns of the digital and technology age and spun it in the favor of the product. It works well, but it doesn't really exemplify what the product does." — Male 21-35

"It plays on the fears and paranoia of technology companies taking over" — Male 50+

Want more insights?

Contact us for additional analytics from the Super Bowl or for your brand or category.

