

Super Bowl 2015 Advertising Summary: Post-Game Huddle

February 10, 2015

Bruce Pivarunas: Chief Product Officer

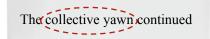
As for me, I'd be THRILLED if this year's SB ads defined the *everyday* norm . . . but, unfortunately "good" isn't "good enough" during the big game



With respect to Super Bowl advertising, <u>everybody</u> is a critic . . . and this affects <u>everything</u>!



The critics' review of "what happened" to 2015 Super Bowl advertising . . .



The thrill is gone. Or the comedy, at any rate.

[Ads were more] somber than anytime in the past





People don't seem to be very impressed with these serious looking ads

Begging for more funny ads



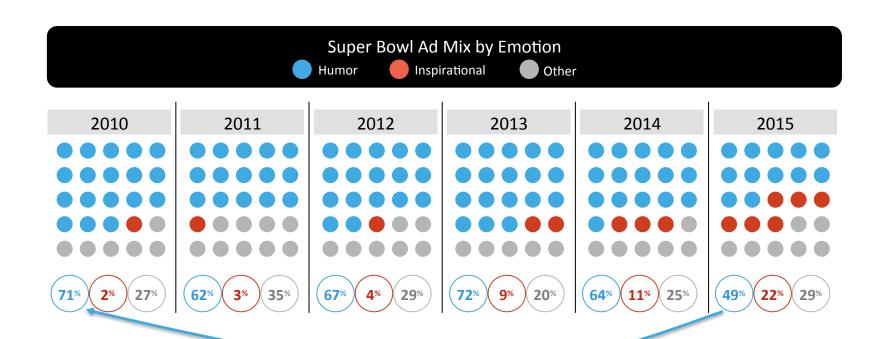


Remember when Super Bowl ads were funny?

What's
With All
The Dark,
Depressing
Super
Bowl Ads
This Year?

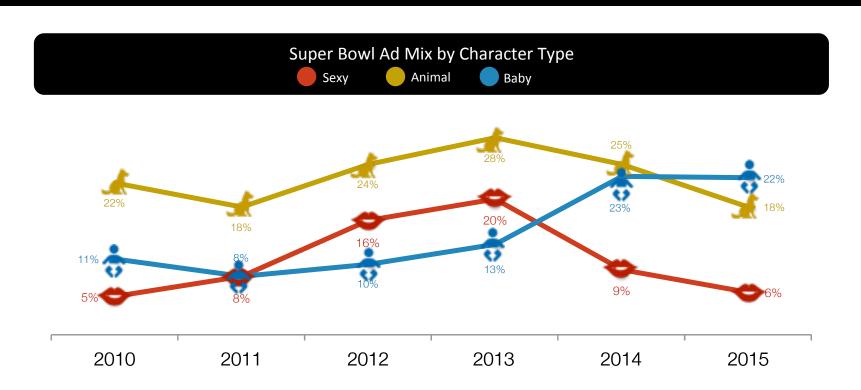


The critics are right, as a whole Super Bowl ads are just not trying to be as funny as they used to be



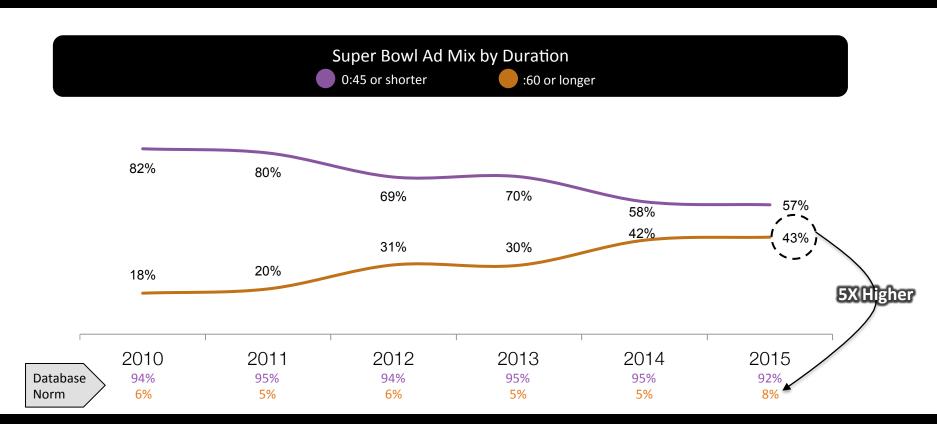


Super Bowl advertising also cut way down on sex . . . which (ironically) resulted in there being far more babies around

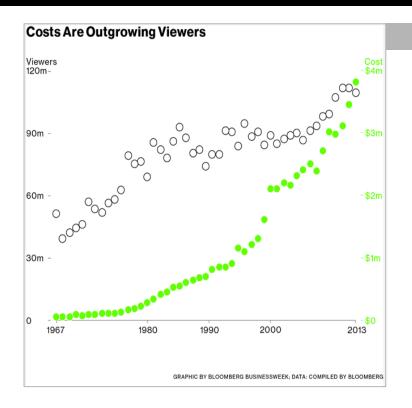




Emotional stories take more time to tell . . . so ad lengths remained high



With Super Bowl ad costs increasing at a much faster rate than viewers, there is less margin for creative error . . . it's increasingly important to get it right



A Very Unique Advertising Playing Field

The Super Bowl (SB) is the only event of the year where advertising is fundamental to the entertainment experience . . . SB ads themselves are a "stop & watch destination" rather than a distraction that viewers have grown increasingly inclined and enabled to avoid

At \$4.5 million per 30 second spot (\$150,000 per second!), Super Bowl ads are engaged in a high stakes competition to most deeply penetrate viewers' hearts and/or minds ... "general market minds" that may differ substantially from their brands' actual target audience

As with any competition a variety of potential strategic options can be selected, each carrying its own set of trade-offs . . . some will work . . . others may not

We really shouldn't be surprised by the Super Bowl's creative trends and the critics' reaction . . . it was all actually pretty predictable



High Ad Costs Combined With The "Bright Sunlight of Visibility" Lowers Risk Tolerance



The Largest Stage Elicits The Most Critique . . . Often Provocative . . . Ripe For Viral Backlash



Fewer Novel or New Ads . . . There's a Safety Net In The "Tried & True"



Previously Edgy Ads Get Rounded Down . . . Better to Err on the Side of Family Friendly



Caution . . . Even Serious Isn't Safe . . . & Serious Has a Shelf Life



Today, we'll be exploring Super Bowl ad performance within this context

Agenda

- Brief Introduction to Ace Metrix data
 - Methodology topline & core diagnostic measures
 - A couple of new views of the data that we'll be referencing throughout today's session
- Key Themes
 - Penetrating the hearts and/or minds of Super Bowl ad viewers
 - The strategic challenges and trade-offs of key creative strategies . . . domino effects
 - High Ad Cost and Visibility Drives Risk Aversion
 - The Safety Net of "The Tried and True"
 - The Drift Toward the Security of Family Friendliness
 - Caution: Even Serious Isn't Safe Anymore
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 - Topline Performance of Celebrity-Featured Ads
- 2015's Top 10 Super Bowl Ads
 - Topline Score Review
- Closing Thoughts . . . Questions?



ACE METRIX 101



Who We Are

Ace Metrix provides a uniquely clean and comprehensive read of industry-wide CREATIVE effectiveness, quickly capturing viewer feedback on ads <u>before</u> creative influences get intertwined with a wide array of in-market distortions such as media weight, SOV, program engagement, etc.



How It Works

Ads are shown to 500 respondents, who then complete standardized surveys that assess every ad both QUANTITATIVELY and QUALITATIVELY, providing the why's behind the what's of creative performance. Results are made available to clients via multi-screen user friendly UI's within 24-48 hours or receipt.



What We Measure

Short answer: Video Ads. All nationally airing TV ads are covered within Ace Metrix syndicated coverage. Measurement is not limited to TV, as we test many digital video ads as well.



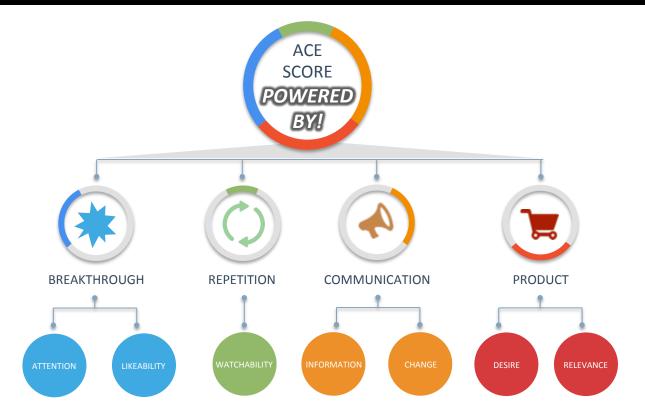
The Database

Since 2009, we have tracked 40,000+ ads... from 1,400+ brands... across 96 categories... resulting in over 20 million responses and 11 million verbatims.



THE HOLISTIC "ACE SCORE" & DIAGNOSTIC METRICS . . .

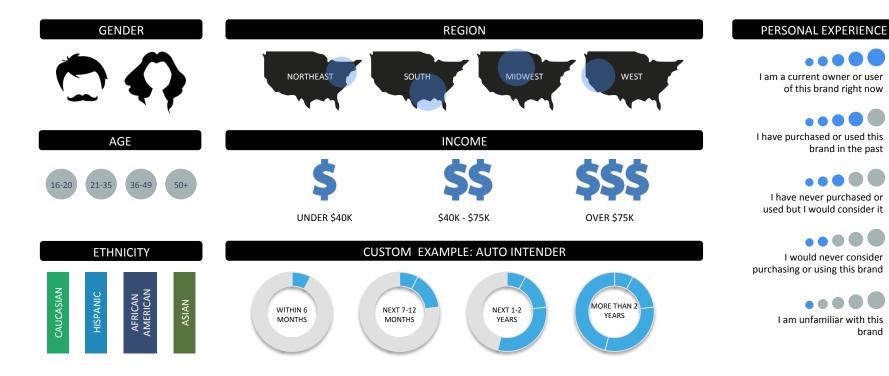
provide multiple quantitative facts covering a broad array of key creative influences





DEMO/SEGMENT BREAKS . . .

reveal the degree that an ad's "beauty is in the eye of the beholder"





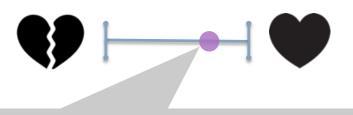
QUALITATIVE METRICS + MORE . . .

enrich understanding of the "why's behind the what's" of ad performance

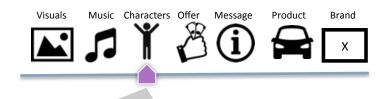


What was the brand name of the product or service in this ad? (Instructions: If there are multiple brand names in the ad please be as specific as possible. For example list the full make and model for a car, the brand/store name and variety for a product or service if multiple names apply.)

UNAIDED BRAND/PRODUCT RECOGNITION (Since Q3 2013)



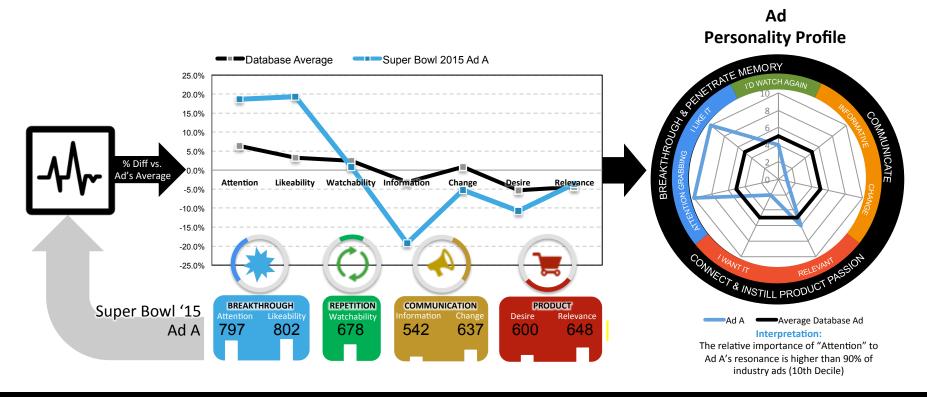
VERBATIM/LANGUAGE -DERIVED METRICS ON EMOTIONAL IMPACT



'BEST THING' ABOUT THE AD (Since Q2 2014)



Ace Metrix 200: Ad Personality & the OMG! Factor . . . harnessing the power of "Stop & Watch" and "Seek & Share" advertising

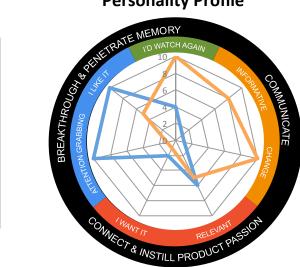




Ace Metrix 200: Ad Personality & the OMG! Factor . . . harnessing the power of "Stop & Watch" and "Seek & Share" advertising



Ad Personality Profile



Ad A

The relative importance of "Attention" is in top 10% of all ads

Ad B

The relative importance of "Change" is in top 10% of all ads



Ace Metrix 200: Ad Personality & the OMG! Factor . . . harnessing the power of "Stop & Watch" and "Seek & Share" advertising

THE RE-ENGAGER

These are many people we'd be happy to see again, but some that if we see them walking toward us down the street we'd duck into a store to hide. We feel no need to avoid Re-Engager ads. Logically, just as with long-winded people, ads of long duration (one minute+) often struggle to get people to re-engage.



THE PERFORMER

These ads quickly jump from the crowd; they were born to breakthrough the clutter of noisy environments. There often is not a lot of (product) substance to them, but they are able to grab our attention because they're fun, interesting, & (above all else) entertaining.



PERFORMER

BREAKTHROUGH TO MAY TO

THE PROFESSOR

These ads can open our eyes to new things, make us better informed consumers, if they can get our attention. Professor ads tend to shine brightest in more intimate or captive audience settings . . . after attention is achieved.



THE CONVERTER

Often in in-direct ways, these ads make us think differently about brands. They change our perceptions and put forth a new vision for the direction of the advertised brand.

THE REINFORCER

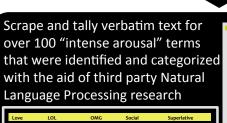
These ads inspire us through ad relevancy and product desire. We can relate to them because of our pre-established interest in what they're selling or saying. Oftentimes, these ads don't need creative subtleties; directly leveraging Pavlovian product appeal can be enough.





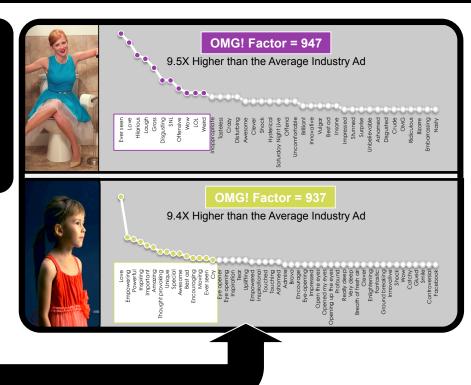
The OMG! Factor assesses the ability to emotionally connect in a way needed to create "Stop & Watch", or in rare cases "Seek & Share", advertising

Always: Like a Girl (click on image to play online) "It was the most profound and powerful thing I've ever seen. It made me realize just how insulting 'like a girl\" is when describing actions. I don't know how I never noticed it before. It made me proud to be a girl as I saw the confidence exude from the younger and then older girls. It was a breath of fresh air." Female 21-35 Under \$40k Caucasian Child South "I found this to be a very moving and powerful piece. I felt guilty for all the times I must've used that expression in a derogatory manner. It's so important to empower young women to believe in themselves. This is a GREAT ad."







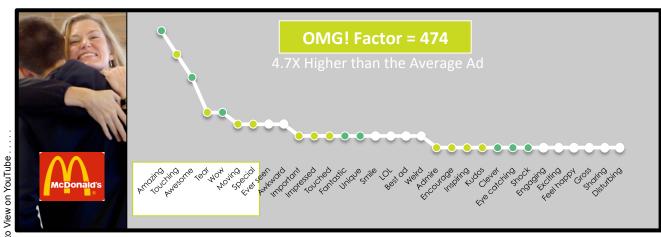


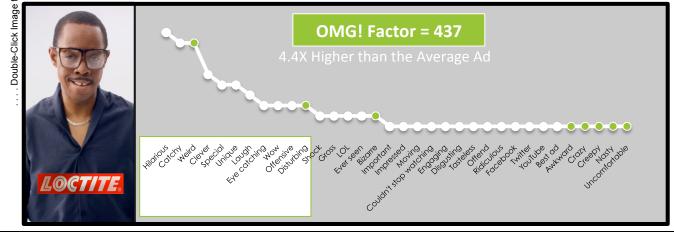
While McDonald's sourced its OMG! from admiration & amazement ...



Loctite did it through terror & a blend of other emotions

Polar opposite creative approaches . . . same emotion-driving OMG!







Top 10 most emotionally arousing ads of SB 2015, averaging 5.6X the OMG! of typical industry ad, and how they did it makes this the year of admiration



Microsoft
fueled by
ADMIRATION



fueled by ADMIRATION

Microsoft



fueled by ADMIRATION

Budweiser



Always fueled by ADMIRATION



fueled by ADMIRATION



fueled by ADMIRATION

Coca-Cola



fueled by ADMIRATION

McDonald's



Toyota
fueled by
ADMIRATION



fueled by TERROR



Carl's Jr.
fueled by
LOATHING



Top 10 most emotionally arousing ads of SB 2015, averaging 5.6X the OMG! of typical industry ad, makes this the year of admiration



Microsoft
inspiring
touching
moving



inspiring empowering

Microsoft



touching awesome tear

Budweiser



Always

powerful
inspiring
moving



touching moving important



inspiring encouraging uplifting

Coca-Cola



McDonald's

touching
tear
amazing



inspiring moving bold



weird disturbing bizarre



Carl's Jr.

disgusting inappropriate gross

Agenda

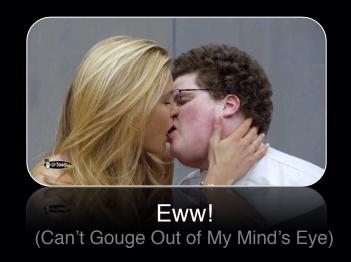
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These Are The First Two Ads (By Far) That Popped into My Mind When I Began Thinking About Recent Years' Super Bowl Advertising



Aww!
(Literally Brought Tears to My Eyes)









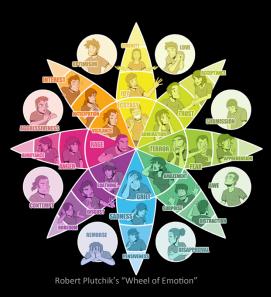
Aww!
(Literally Brought Tears to My Eyes)



Eww!(Can't Gouge Out of My Mind's Eye)

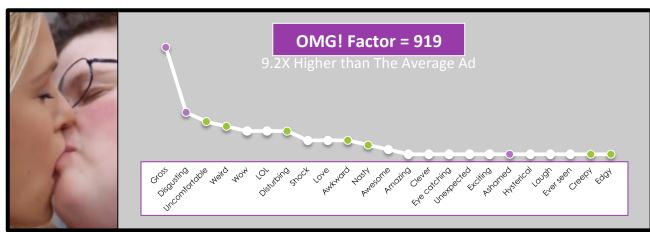


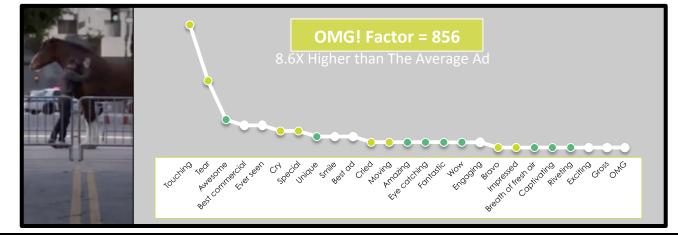
While Go Daddy sourced its OMG! from loathing & terror ...



Budweiser did it through admiration & amazement

Very similar OMG! Factors . . . but VERY different paths to it!







TODAY | February 01, 2013

Model's close-up kiss in GoDaddy ad shocks some

A Super Bowl ad for GoDaddy.com starring supermodel Bar Refaeli paired up with a geeky love interest is shocking some viewers with its extreme close-up of the two kissing, NBC's Stephanie Gosk reports and Refaeli, co-star Jesse Heiman, and Matt Miller of the Independent Commercial Producers address the controversy.

Share This:





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Sexist Super Bowl ads? #NotBuyingIt, some say

By Emanuella Grinberg, CNN updated 1:39 PM EST, Tue February 5, 2013



GoDaddy's "Kiss" ad drew criticism from men and women for stereotyping programmers and objectifying women.

THERE ARE 3 COMMENTS.

Show speed reading tips and settings

Yep - gross

That was what the ad guy came up with? The Super Bowl ad team? Why would you want your goods and products to feel awkward?

Go Daddy please

by whitsboys on Feb 4, 2013 | 7:15 PM

I boycotted anything that had to do with Go Daddy.com, after watching this over you lost one LOL.



26

Its only temporary, my state of mind is intermediate it comes & goes.

The winner of 2012, The Garo Yepremian & The Larry Csonka Awards. Clouds are temperary, life's simple pleasures must be sampled on a continious bases!

by wild zion beaver on Feb 8, 2013 | 5:53 PM 1 up

You may have two sides but...

As far as I am concerned they are the opposite of what you think. Godaddy's sides are more along the lines of distasteful and stupid. You need to grow up and realize that thinking from your other "head" is never going to be the smartest play.

You are a bunch of simple minded morons who need to replaced with decent human beings interested in bettering the world. Leave the stuff that belongs behind closed doors there and provide better quality or I hope your business dies a horrible death.

by rosannarmiller on Feb 12, 2013 | 5:56 AM

Some found a safe haven in the "tried & true" . . . and their ads scored well

Extending a Proven Theme



Repurposing a Digital Ad

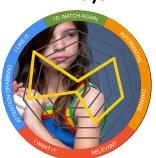
Snickers



Budweiser



Always



Dove



652

Powered By

- Ability to appealingly grab viewer's attention
- · Pavlovian desire for Snickers
- Relatability of the iconic Brady Bunch theme

652

Powered By

- Ability to appealingly grab viewer's attention
- Emotionally drawing upon our heartfelt connection with the animals/pets in our lives

Ace Score

SB '15 Norm **576**

Database FY'14 Norm **549**

636

- **Powered By**Ability to appealingly grab viewer's attention
- Its ability to inform on an important/relevant topic, and shift opinions in the process

633

Powered By

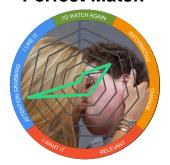
- Ability to appealingly grab attention
- Its ability change opinions about the brand by tapping in to the emotional bond between father & child (rather than with product info)

Rounding down the edges on once edgy/shocking advertising. . . .



Today's GoDaddy You'd Be Willing to Bring Home to Mom

Perfect Match



Muscle Builder



Journey Home



Raise A Chip



413

Powered By

- Ability to shockingly/disturbingly grab viewer's attention
- Its ability to, once attention is captured, introduce the viewer to a low awareness product/brand

432

Powered By

 Ability to grab attention AND begin moving the brand away from shocking/disturbing highavoidance ads...changing brand imagery as a result

Ace Score

SB '15 Norm 576 Database FY'14 Norm 549

476

 Ability to grab attention and maintain the brand's edgy/ irreverent heritage while still moving the needle positively on appeal (vs. Perfect Match)

Powered By

471

Powered By

 This "Professor" ad was born to shine brightest AFTER attention has been achieved, it educates... changes brand image... and doesn't scare people away

28

Note: GoDaddy's GenPop Ace Scores in the Super Bowl are heavily constrained by its advertising a niche product to a largely disinterested mass audience



Advertising Beauty Is Definitely In The Eye of The Beholder

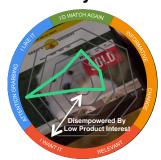
Perfect Match



Muscle Builder



Journey Home



Raise A Chip



413

432

Ace Score

476

471

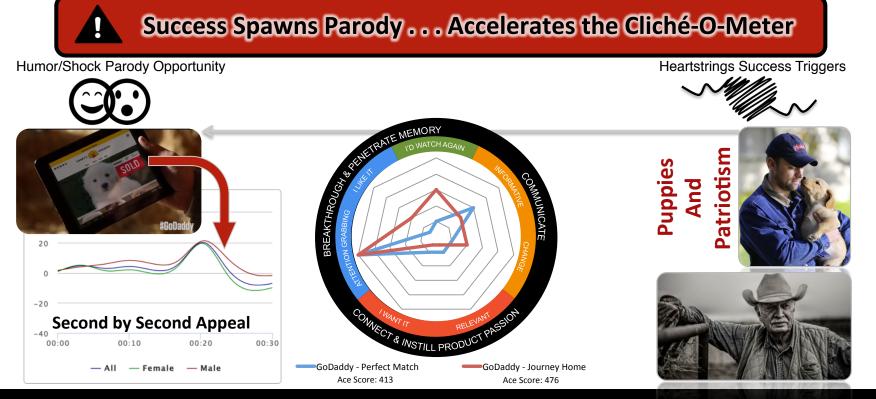
Data not yet collected

 Among the 5% of respondents who currently use GoDaddy, the Ace Score is 647 SB '15 Norm **576**

Database FY'14 Norm **549**

- Among the 7% of respondents
 who currently use GoDaddy,
 the Ace Score is 695
- Among the **6%** of respondents who currently use GoDaddy,

Serious/sentimental themes can provide some measure of safety . . . but they can have a shelf life



Serious/sentimental themes can provide some measure of safety . . . but they can have a shelf life



Success Spawns Parody... Accelerates the Cliché-O-Meter



"This is the United States of winning, and ..."

"we're taking it to the end zone every day . . . "

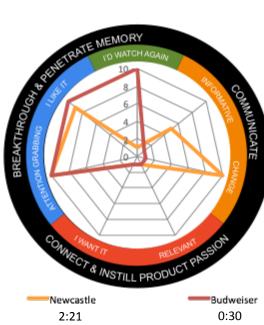


The social periphery of the Super Bowl broadcast is a safer place to be bold . . . take some chances . . . even try out some new uses of classic big brand icons















Serious doesn't guarantee safety . . . beware of igniting the Super Bowl tinderbox



Today's Zero Tolerance Policy for "Unsportsmanlike Conduct"

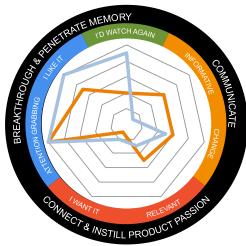
The Nationwide Story

How Their "Boy" Ad Was Received Outside the Influence of the Angry Mob



Nationwide "Boy" informed viewers about intensely sad but relevant subject matter, leveraging emotive power that outperformed "Invisible's" entertainment focus

Ad Personality Profile



Nationwide - Boy Ace Score:

604

Ace Score:

-Nationwide - Invisible

Voice of The Ad Viewer



sad safe insurance

really informative Media for the following of the foll

"The ad made me proud to have nationwide as my car insurance carrier"

"Amazing and touching ad. It really makes you think about how awful things can happen and how you need to be protected."

"This was intense - I was watching it expectiing one thing and then was quite suprised when the young boy says he drowned. Not the happiest of messages but a very important one. It was done well considering the topic and it gets and keeps your attention."

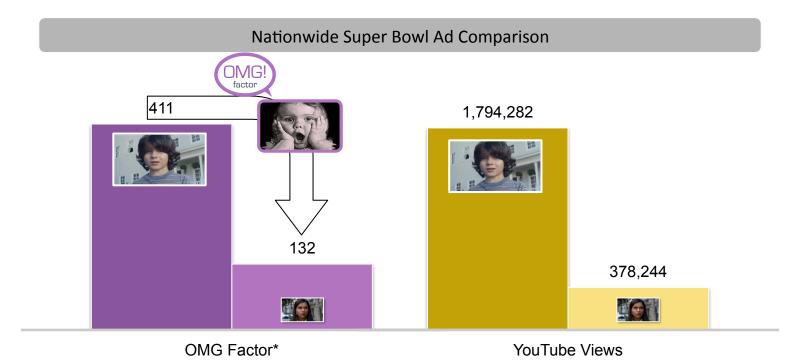
"The little boy actor was great and made me want to cry in the end"



"You did it, you made me cry."



The OMG Factor for "Make Safe Happen" was over 3X that of "Invisible," which bears out in online viewership



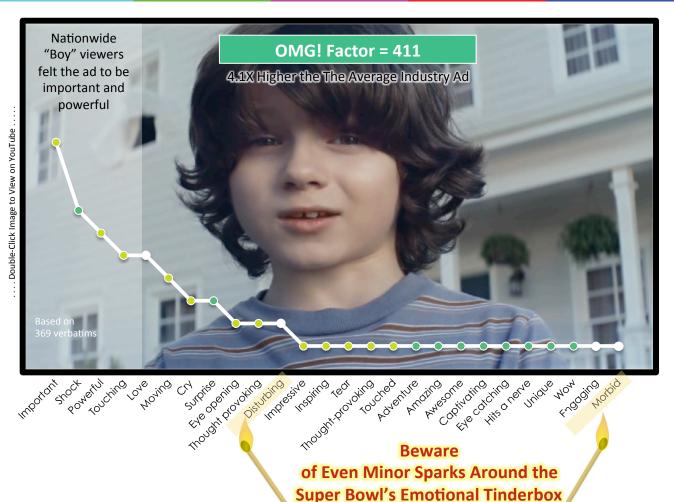
^{*} Index versus average industry ad (411 means 4.1X higher presence OMG! Terms in verbatims)

acemetrix.com

Ace Metrix Proprietary & Confidential

Arousal terms of admiration and amazement drove "Boy" to an OMG! Factor of four-fold the industry norm





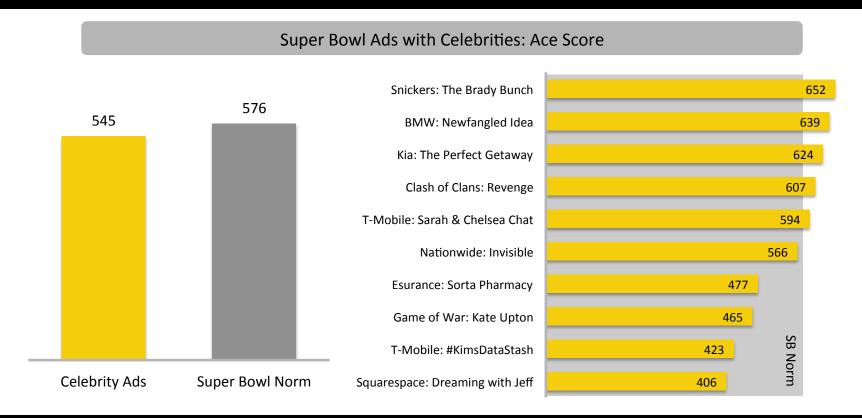
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Overall, Super Bowl ads featuring celebrities performed lower than those without – Snickers was the most productive, while Squarespace struggled





Of 2015 Super Bowl celebrity ads, Kim Kardashian was by far the most recognized and commented on in verbatims

Super Bowl Celebrities: % of Verbatims in which Celebrities are Mentioned



Snickers 13% Mention



BMW 6% Mention



Kia 10% Mention



Clash of Clans 22% Mention



T-Mobile 5% Mention



Nationwide 8% Mention



Esurance 14% Mention



Game of War 6% Mention



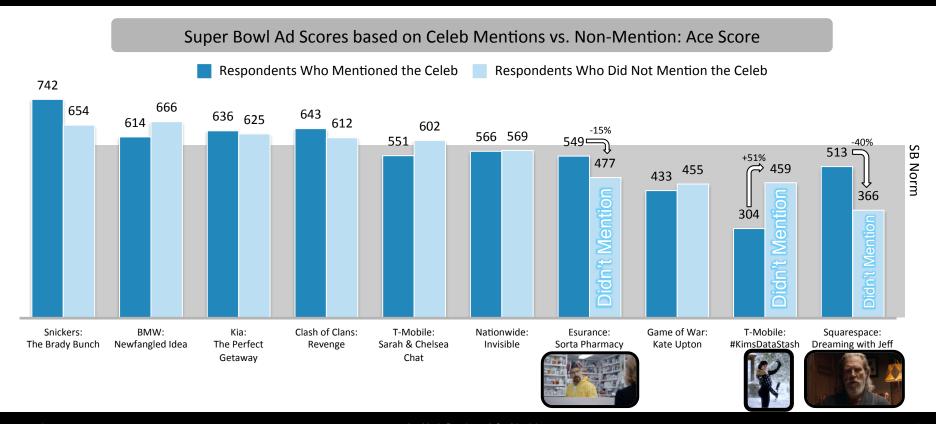
T-Mobile 36% Mention



Squarespace 9% Mention



While some narratives were strong enough to stand on their own two feet, others required background celebrity knowledge to be effective





Background knowledge of Bryan Cranston and Jeff Bridges aided story ad comprehension, but viewers were otherwise lost

Esurance: Sorta Pharmacy



This was great, I love breaking bad and this was great seeing Bryan Cranston's character in a ad like that. it was entertaining even though I might not buy the product I don't mind watching commercials like that

Oh hell yes. Mr. Cranston playing his most notorious role within the same area of expertise...it was f-ing great, and I have not even watched a single episode, yet the advertiser knew what they were doing.

Didn't like it. Just not mentally stimulating nor visually. **The mask on the guy** in an area **where a respected pharmacist should be** and the negative look on the customer were a turn off for this commercial. I don't like ads that appear and seem "negative".

"The whole ad made no sense to me. Then to find out that it wasn't about health insurance or something about pharmacies but was just abut Esurance? The ad people AND the company ad people who came up with this one should be fired!"

Squarespace: Dreaming with Jeff



By using Jeff Bridges I was immediately interested in what the ad would be about. I think the ad was stating that anybody can create a website for anything and market it, even something outlandish such as JeffBridgessing to sleep.

I really like Jeff Bridges, so I love the ad. I am already familiar with Squarespace, so I thought it was clever and creative, however had I not been familiar, I wouldn't have known what it was for.

I have no idea what to think. It was bizarre. It finished and I had no idea what its intent was, or exactly what I had just watched. I'm really not sure what the product/website is about, in any way.

I have absolutely no idea what this ad is doing for me in terms of product awareness, ad story, etc. I would watch it again only to see if it is as meaningless to me as the first viewing of it.



Conversely, T-Mobile's Kim Kardashian ad was significantly more productive among respondents who did not bring her up in verbatims

T-Mobile: #KimDataStash



I like it! Nice way to use emotional appeal for a phone service! I think it worked really well.

I think it is pretty humorous in a dry way and I liked it"

I thought the whole idea of wanting to keep up with Kim Kardashian's life was pretty dumb. Not everyone cares about her. I liked what T-Mobile was offering though, but I'd have to watch the ad again to fully realize what they were offering because Kim Kardashian was annoying.

This ad is trash. The person used in this ad, Kim, is a trashy person with no or extremely low morals and represents all that is wrong with self image in this country. She is a complete turn off! Please destroy this ad!

Horrible, Kim Kardashian is terrible. Just because you used an iconic person known today doesn't mean it will exactly gain you popularity.

I didn't like this commercial, I don't like Kim or anything she stands for. There is no need for the sexuality in a cell phone company ad

I don't like Kim K and I tend to tune her out when she is on for anything. She basically represents what I think is wrong is society

Bahaha! I'd give up data not to have to see Kim Kardashian's pictures... I'm sure others feel the same way!

I am so sick of seeing and hearing Kim Kardashian! Seeing her in the ad actually makes me want to explore the product less."

I guess it's all about **kim kardashian** but i **didn't understand** the actual ad or what was being advertised.

With polarizing or unpopular celebrities, be very overt with self-deprecating humor so it doesn't get lost in viewer's initially negative visceral reactions

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AD SCORES



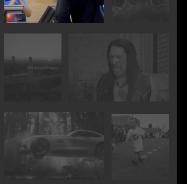
VOICE OF THE VIEWER

AD PERSONALITY



BRAND AFFINITY

SUPER BOWL XLIX NORM





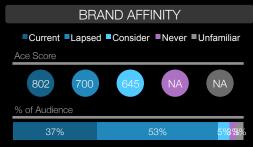


McDonalds - Pay With Lovin'

AD SCORES 706 763 Attention 759 Likeability Watchability Information Ace Score 728 Change 685 Relevance 702 Desire

THIS WAS AMAZING. The touching moments between families, the humor added on with the silly requests. This was great. I think this is really wonderful. To have McDonalds encourage kindness and compassion in others is very nice.

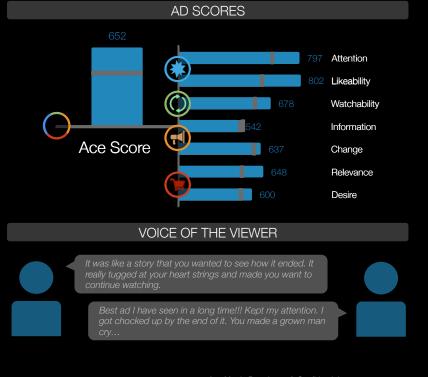




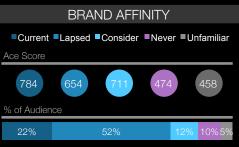


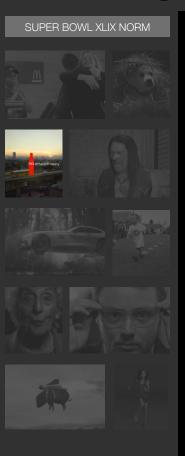


Budweiser - Lost Dog



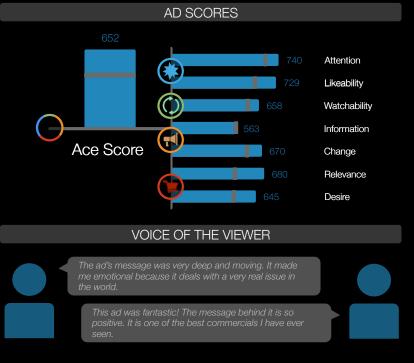








Coca-Cola - #MakeItHappy



AD PERSONALITY

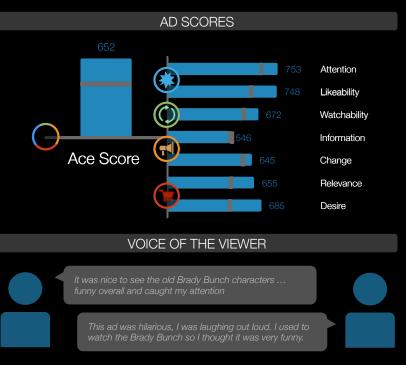


BRAND AFFINITY Current Lapsed Consider Never Unfamiliar Ace Score 733 594 623 NA NA % of Audience 51% 42% 4998





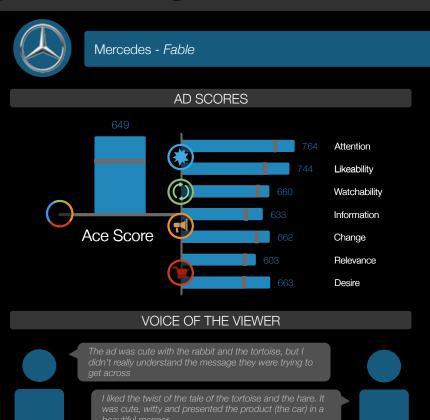
Snickers - The Brady Bunch







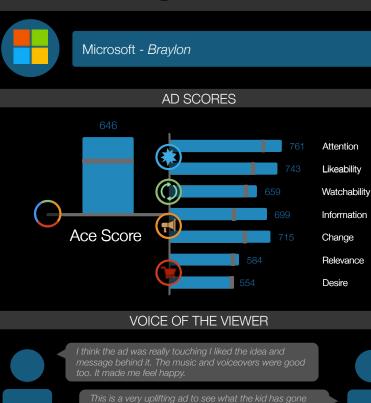


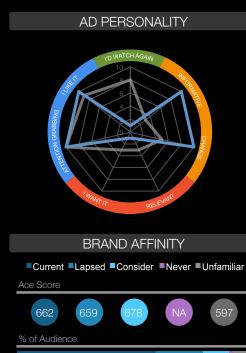


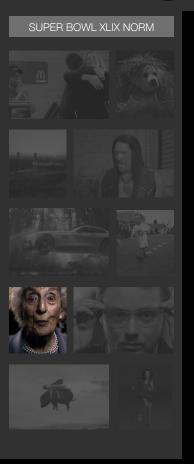
AD PERSONALITY I'D WATCH AGAIN **BRAND AFFINITY** ■Current ■Lapsed ■Consider ■Never ■Unfamiliar Ace Score (Among \$75K+) % of Audience (Among \$75K+)

5% 9%



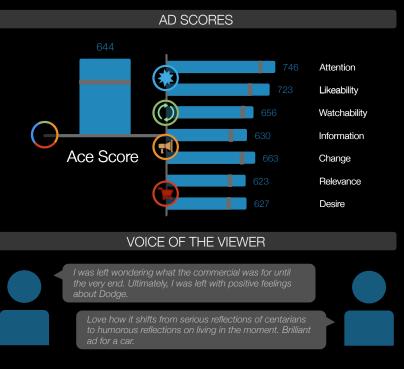




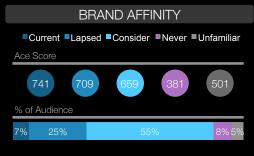




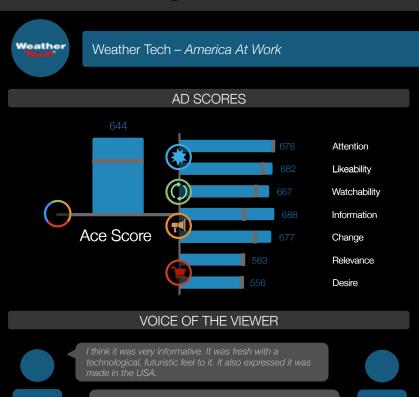
Dodge - Official Dodge Wisdom













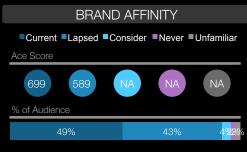
SUPER BOWL XLIX NORM



Doritos - When Pigs Fly

AD SCORES Attention Likeability Watchability Information Ace Score Change Relevance Desire **VOICE OF THE VIEWER**





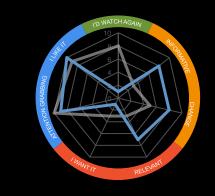


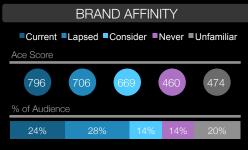


Always - Like A Girl

Attention Likeability Watchability Information Ace Score Change Relevance Desire **VOICE OF THE VIEWER**

AD SCORES





Agenda

- Brief Introduction to Ace Metrix data
 - Methodology topline & core diagnostic measures
 - A couple of new views of the data that we'll be referencing throughout today's session
- Key Themes
 - Penetrating the hearts and/or minds of Super Bowl ad viewers
 - The strategic challenges and trade-offs of key creative strategies . . . domino effects
 - High Ad Cost and Visibility Drives Risk Aversion
 - The Safety Net of "The Tried and True"
 - The Drift Toward the Security of Family Friendliness
 - Caution: Even Serious Isn't Safe Anymore
- Celebrities' Performance on This Year's Big Stage
 - Topline Performance of Celebrity-Featured Ads
- 2015's Top 10 Super Bowl Ads
 - Topline Score Review
- Closing Thoughts . . . Questions?

