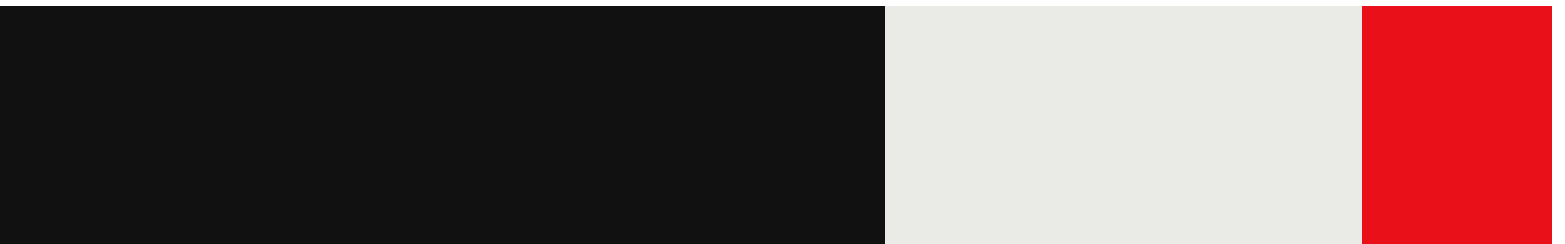


The Daily: Super Bowl LVII—Viewership numbers, the most interesting ads, and the unofficial playbook

Audio



On today's episode, we discuss whether Super Bowl viewership is trending up or down, what the best ads were (and why), and what to include in an advertiser's Super Bowl playbook. Tune in to the discussion with our analyst Paul Verna.



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Episode Transcript:

Marcus Johnson:

Hey, gang. It's Thursday, February 16th. Paul and listeners, welcome to the Behind the Numbers: an eMarketer Podcast made possible by Tinuiti. I'm Marcus. Today, I'm joined by our principal analyst who heads up our digital advertising and media practice. Based out of New York, it's Paul Verna.

Paul Verna:

Great to be here.

Marcus Johnson:

Hey, chap. Today's fact, why in most armies is the lowest grade of enlisted personnel called a private? Well, according to [militaryrankings.org](#), for European countries and then for the US, the term private derives from the medieval concept of private soldiers. These were men who volunteered or were conscripted into service by feudal lords and, later on, rulers of states. The tradition of privates being the lowest ranking soldier with only individual responsibilities derived from the idea that private soldiers had no responsibility other than their individual duty to fight. That's where it came from.

Paul Verna:

Learn something new every day, Marcus. I mean, I learn-

Marcus Johnson:

Sometimes.

Paul Verna:

... something new from you every day.

Marcus Johnson:

Thanks. Sometimes with this podcast, sometimes you just have to wait for the episode to actually start, but I feel like we did a good job with this one. Anyway, today's real topic, Super Bowl LVII ads.

All right, in today's episode, we'll cover just the Super Bowl. No, in other news today we've got too much to discuss. We'll talk about how many people watched the thing, what the best ads were and what the best Super Bowl playbook looks like if you're an advertiser. But we start with the Super Bowl.

Let's explain. This year's Super Bowl happened this past Sunday, February 12th, between the Kansas City Chiefs and the Philadelphia Eagles. Shout out to the Chiefs who won 38-35. Not only was it different because we haven't seen the league MVP, who is Patrick Mahomes this year, go on to win the Super Bowl in decades. Hasn't happened in ages that the regular season MVP wins the Super Bowl. But it was also different because it didn't see any cryptocurrency company ads.

Coinbase, crypto.com, eToro and FTX spent a combined over 50 million dollars on Super Bowl ads last year. Last year's Super Bowl, according to MediaRadar. Since then, FTX collapsed. The share price of Bitcoin has been cut in half, and Coinbase laid off 20% of its workforce twice. Sarah Morrison of Recode notes it was dubbed the Crypto Bowl, but what would you call this one? What ads did we see this year?

Paul, we will first start, though, before we get to the ads, with some viewership numbers. How many folks watched the thing?

Paul Verna:

A lot.

Marcus Johnson:

Very good.

Paul Verna:

By early estimates from Nielsen, and these are subject to change, about 113, north of 113 million, and that includes both linear TV and digital. That's up a little bit from last year, which I think was around 112 million. I will say that a lot of the data around viewership in the media that gets reported is very ambiguous as to whether it includes streaming or not.

Marcus Johnson:

Mm-hmm.

Paul Verna:

And I've seen some... what looked like very authoritative and complete rundowns of viewing over the years where some years it includes digital, and some years it doesn't. So it makes it hard to say what was the growth over last year or over five years ago. But the bottom line is, at 113 million linear plus digital, it was definitely among the most viewed Super Bowls, possibly the second most viewed, according to the data that I have. So a big success by any measure.

Marcus Johnson:

Yeah. Yeah, it looks like the second most viewed. Beat last year's 112, but falls short of the one 114 million records set in 2015. That was Patriots-Seahawks. Halftime show did pretty good as well.

Paul Verna:

Yeah.

Marcus Johnson:

The Apple Music halftime show, Rihanna performed that, drew an average 119 million viewers, making it the second most watched performance in Super Bowl history. The most watched was Katy Perry 2015, same year as the most watched Super Bowl.

And that's impressive, Paul, because there's more and more people in America. There are 15 million more people today than there were in 2015 in this country, so it's easier to get higher viewership numbers as the years go by because the population's bigger. So that's a heck of a record from 2015. But very close to that, very impressive 113 million viewers this time. That's, as Paul said, across TV and digital.

Paul, now the Super Bowl has seen viewership of a hundred million plus for 12 of the past 13 years. Pretty much. One year was like 99.9, but give it a hundred, that's 12 of the past 13 years pretty much. Is this just going to be an event that, however you watch it, lives on a TV screen, an event that continues to get these kinds of viewership numbers, whereas some other programming we've seen which comes to us through the television has really struggled over the years?

Paul Verna:

Yeah, I'm certainly not betting on the popularity of the Super Bowl to decrease. It has been-

Marcus Johnson:

Even as we move to streaming, right?

Paul Verna:

Yeah. I mean, streaming really just means that people are accessing it a different way, but it doesn't really reflect on the popularity of the sport. And in fact, I would argue that a lot of the viewing, especially in public places, there's no way that the viewer knows how that program is being carried, whether it's through a streaming service or TV network. So it's becoming almost irrelevant, at least from the point of view of the end user.

Marcus Johnson:

Yeah.

Paul Verna:

So yeah, I think... And I know we're going to talk about the shift from linear to streaming. That's obviously going to continue to tip in favor of streaming. But overall, the overall number of people who watch it, I just don't see it trending downward anytime in the foreseeable future.

I mean, obviously it's a little lumpy from year to year. There might be years when it's down a little bit, years when it's up a little bit, but I just don't see it going the way of, say, linear TV, where we do see that the audience is gradually eroding.

Marcus Johnson:

Right. Quickly, before we move to where people are watching, Variety was pointing out that of the top 100 most watched primetime telecasts, top 100 of 2022 by total viewers, citing Nielsen data it was the 2022 Super Bowl, that was last year's Super Bowl between the Rams and the Bengals. Second place was the NFC championship game last January 2022. It had half as many as the Super Bowl. Then fifth place show was football again, and then you're down to 30 million viewers. So the drop-off from Super Bowl to the next most viewed program, which again was football, to the fifth through 10th place, you're down to about 20 million. So you're going from a hundred quite quickly down to 50, quite quickly down to 20 or 30 million. And you're just really just getting outside of the top 10. PSA of the top 10 most watch shows in 2022 were NFL games. Ninth and 10th place was college football championship and the Winter Olympics. So pretty much all sports, particularly football, taking the top spots in terms of viewership.

So, Paul, 113 million folks watched Super Bowl across TV and digital, as you mentioned, but where people are watching is changing. Do we have any numbers to try to tell that story?

Paul Verna:

According to Adobe Analytics, this year's digital feed averaged about 7 million streams, and that was up over last year with 6 million. So that's an 18% increase, and it's more than double the last time Fox carried the Super Bowl in 2020. So obviously, more of the audience is going toward the streaming side, which of course is exactly what we see with TV viewing in general.

Marcus Johnson:

Mm-hmm. And I don't believe that that 2015 record that was set, I don't believe that included digital. So you are seeing the shift of people moving over to digital, but if this year's anything to go by, you're not seeing those numbers drop, which is interesting. So we're seeing a similar number of people watching the Super Bowl just differently, which is something that we've talked about before, is that people are just consuming content differently, not through the set-top box, not through cable, just through streaming platforms, which seem to be making up the losses that we're seeing with people cutting the cord.

Paul Verna:

Yeah, exactly. And if you look at our figures for cord cutters, people watching on traditional cable or satellite versus people who have cut the cord and are watching on digital-only

platforms, those numbers continue to trend in the opposite directions. Of course, with streaming growing, so it would just make sense that the Super Bowl is going to reflect that.

Marcus Johnson:

Mm-hmm.

Paul Verna:

And back to my earlier point, the total audience is growing because it remains popular. So the mix between where people watch it is just going to keep shifting without necessarily affecting the total. So yeah, what it's losing on the traditional TV side, it's more than gaining on the digital side.

Marcus Johnson:

Right. How much was spent on ads? Well, all told, Fox said that they took in 600 million dollars in ad revenue for Super Bowl LVII, with some in-game 30-second spots going for north of 7 million dollars. The average price for a spot was close to six and a half million. Paul, what's your take on this seemingly unstoppable price increase for a Super Bowl ad slot?

Paul Verna:

Well, I did some math of the price inflation of Super Bowl ads, and here's what I found. So if you use a compound annual growth calculation from the very first Super Bowl to this past one, so that's 57 years, the growth is of 9.8%. So let's just say 10%. So that's basically the compound annual growth every year for those 57 years, 10%. If you look at the US economy, the growth was about 4% in that time. So one way to look at it, then, is that Super Bowl ads are outpacing cost of living by about a factor of two and a half.

Marcus Johnson:

Wow.

Paul Verna:

Another way to look at it is the viewing audience. We're talking about how the viewing audience grows, but the growth in the viewing audience over, let's just take the last 10 years, it's actually just a fraction of a percent, whereas the growth in the ad rates in that same time is about 6.5%. So by any measure, Super Bowl ads are outpacing every other index of price

increases. So in that sense, you could look at it as price inflation, price gouging, whatever you want to call it, but obviously it's what the market will bear. And I think the more telling stats are that... And you talked a little bit about some of these or related ones.

So 29 of the 30 most viewed broadcasts in US history were Super Bowls. So 29 out of 30, the other one being the M*A*S*H finale, for those of you of a certain age. And last year, 82 of the 100 most watched TV broadcasts were NFL games according to Sportico. Another thing is that 44% of Americans consider themselves NFL fans, and that's 13 points higher than the second one, which is MLB. And I'm sorry to say, Marcus, that-

Marcus Johnson:

[inaudible 00:12:24].

Paul Verna:

... NBA's at number three.

Marcus Johnson:

Come on, America.

Paul Verna:

These are all Ipsos' numbers, by the way. So 44% of Americans, and also from Ipsos, that's fan base of 44% of us. It splits right down the middle by political party, whereas other sports tend to lean one way or the other. So you're looking at a form of entertainment that is enormously popular in the US and that is popular right across the board, political persuasions, gender, age group. So in that vein, the price inflation makes sense because it is almost literally the only game in town at this point.

Marcus Johnson:

Yeah. And to your point, not necessarily because the audience has been growing, but because there's just no other place to put those ad dollars around such a big audience. The other audience is, for other programs, just have shrunk or have never reached the heights of the Super Bowl, and so it's able to increase those prices, more and more price.

The way I looked at it was this. Prices more than doubled in the last 10 years. In the last 10 years, prices more than doubled. In 2012, it was around three and a half million for a 30-

second ad. Late nineties, it was closer to a million for an ad slot. And now, we're closer to six and a half. Viewership back then, around the nineties, was still around 90 million-

Paul Verna:

Right.

Marcus Johnson:

... people. So it's not like they're getting way more people for way more money.

Paul, zooming in on the ads for a second, Apple, which is the only big tech company that hasn't seemed to have struggled as of late, they sponsored the halftime show. Netflix partnered with GM and Michelob Ultra for ads. Google advertised it's Pixel phones, and there were plenty and more ads going on throughout the game. Which ones impressed you the most and why? Do you have a top three for us perhaps?

Paul Verna:

Yeah, and, I mean, let's face it. These are subjective choices. I mean, you know.

Marcus Johnson:

Mm-hmm.

Paul Verna:

You can-

Marcus Johnson:

They are, but then I've also got... I'm curious just to know what you say because there's a USA Today Ad Meter.

Paul Verna:

Yeah.

Marcus Johnson:

There's 150,000 panelists that rate ads from February 8th to the Monday after the Super Bowl, and they look at the most popular ads of the Super Bowl. And this was reported on the Adweek by Stephen Lepitak. And so I'm curious to know what you say because they also have

some as close to qualitative numbers on the popularity of Super Bowl ads as you can get to with this USA Today Ad Meter. So let's see if one of your favorites was the top most rated ad in terms of popularity.

Paul Verna:

Yeah, I haven't looked at that index, but I'm guessing that mine did not match up with them, which just means that those 115,000 people are all wrong.

Marcus Johnson:

Is that what it means?

Paul Verna:

Yes. So here are the ones that resonated with me. I liked the Coors Miller Blue Moon ad, and part of the reason I liked it, first of all it was playful and it had a punchline at the end where obviously, Coors and Miller are one company now, and Blue Moon is one of their brands. But the ad was set up sort of as a battle between Coors and Miller, and it hearkened back, again for people of a certain age, to the Great Miller Lite ads where it was like, "Tastes great, less filling." So I enjoyed that, and I also thought it was interesting. I didn't actually know that Anheuser-Busch had basically a lock on Super Bowl ads for about 30 years as the only alcohol brand, so-

Marcus Johnson:

Yes.

Paul Verna:

... seeing different alcohol brands and seeing some of the people who promoted them, like Serena Williams, was... I thought it was interesting.

Marcus Johnson:

That didn't make the [inaudible 00:15:57].

Paul Verna:

Yes. Told you. I told you, everybody's wrong.

Marcus Johnson:

All right. [inaudible 00:15:59].

Paul Verna:

I liked a lot of the electric vehicle ads. Definitely, this was not a Super Bowl like you were saying last year was the Crypto Bowl. This was not anything bowl. I mean, it was just all over the map.

Marcus Johnson:

Mm-hmm.

Paul Verna:

But there was an emphasis on electric vehicles from the automakers, and I thought the GM one with Will Ferrell was interesting because he called out specifically basically product placement within Netflix. So it was GM and Netflix partnering for an ad with Will Ferrell, so I thought that was cool.

Marcus Johnson:

Auto ads, yeah, they've seen a small... According to iSpot TV data, auto ads have seen a smaller share in recent years. 2010 to 2015, they had about a 35% share.

Paul Verna:

Yeah.

Marcus Johnson:

2015 onwards, it's been below 20%.

Paul Verna:

Yeah. And, I mean, some of the auto ads over time have been really groundbreaking, like the morning in America ad from GM several years ago.

Marcus Johnson:

Mm-hmm.

Paul Verna:

So this was not that year of a lot of auto ads, but I did think it was interesting that they all gravitated toward the EV side.

Marcus Johnson:

Yeah.

Paul Verna:

And that coincides with data on EV prices getting a little bit lower and just a lot of momentum around electric. And then my last one, and this is more just for sentimental reasons, I like the Ben Affleck JLo ad for Dunkin' Donuts. It was, I think, the first ad in the game, and I have a personal connection to Medford, Massachusetts, and it right at the beginning of the ad, it flashed Medford, so that was obviously the location where they shot the ad. So I knew that one was coming. I don't think I knew about the JLo cameo at the end, but he was just funny and cheeky.

Marcus Johnson:

I thought that would be the most popular. So there was Dunkin's ad with Ben Affleck and partner Jennifer Lopez. Patrick Coffee of the Wall Street Journal was noting that Dunkin' hadn't planned to buy an ad until seeing the actor's hidden camera stunt. The final hidden camera style commercial directed by Mr. Affleck stars him taking drive-through orders until JLo shows up.

Audio:

What are you doing here?

[inaudible 00:17:57] me in front of my friends.

Is this what you do when you say you're going to work all day?

I got to go, guys.

Grab me a glazed.

Welcome to Dunkin'. [inaudible 00:18:05].

Marcus Johnson:

And so yeah, that one stood out to me as well, Paul, because it made me think that yeah, Dunkin' was just... they're sitting on this content. And there might be other instances where you are sitting on content that you can just use, and it's going to work really well. We have the James question, which is our question we ask one of the folks on our podcast team. I mean, that's on Instagram, behindthenumbers_podcast. But we had that content and we were sitting on it, and we decided to release that. And this seemed like a similar kind of example. Another one-

Paul Verna:

And it didn't cost us 7 million dollars for 30 seconds.

Marcus Johnson:

Exactly. James isn't cheap, you know. His salary's up there. And then the other ones that jumped out to me, Paul, one was a streaming service, Tubi.

Paul Verna:

Yeah.

Marcus Johnson:

Their second spot made it appear as if Tubi had taken over your TV and that you were no longer watching the Super Bowl after making it seem like someone had used the connected TV controller or remote to change the channel over to Tubi mid-game. So just a making people notice kind of ad, which I thought was really good.

And then the final one from me, this... So Sarah Century of Adweek was pointing this one out. Anytime Fitness, they worked out a clever way to be part of Super Bowl LVII without an in-game slot. So to spread the word, Anytime Fitness released three short teaser videos for an anytime, anytime campaign. In the videos, there's a guy working out, and he explains anytime viewers of the Super Bowl hear the word anytime during the game, halftime in an ad, viewers were invited to use #JustHeardAnytime on Twitter or Instagram to try and win free memberships and a grand prize of a trip to anywhere in the world. So I thought that was pretty clever.

However, Paul, none of those were people's favorites. According to USA Today Ad Meter, the most popular ad of the Super Bowl was from pet food specialist The Farmer's Dog. I

should've asked Victoria what hers was, because I bet that was... Victoria, was that yours?

Victoria:

That was mine.

Marcus Johnson:

I knew it. Oh, man.

Victoria:

The amount of sobbing I did when that commercial came on? Please.

Marcus Johnson:

That gets you. So it tells a story of-

Paul Verna:

Yeah.

Victoria:

Oh my goodness.

Marcus Johnson:

... the bond between a dog and its owner and builds on their lifelong journey. And it is, oh. If you don't feel like crying today, don't watch it.

Victoria:

Brutally beautiful.

Marcus Johnson:

Final... I knew that would be Victoria's favorite. Final question, Paul. Ben Purcell, chief creative officer agency David&Goliath, recently wrote an article and Adweek called The Unofficial Super Bowl Playbook: 12 Things 12 Years in the Game Has Taught Me, or him. One of the things that he has in the playbook is make the product the star, not the celebrity. You have to make sure the celebs don't overpower the premise, the message or the product. I feel like Ben Affleck and JLo did that with Dunkin'. I knew it was a Dunkin' ad, but I didn't really know what

they were selling, whether it was a special menu or anything, even though it was really good ad.

Another item from the playbook is give purpose to the day. One year, there was a campaign that they worked on that added a realtime, Twitter-activated component. So for every yard rushed in the game, more money was raised to help three causes that combated youth homelessness. So that's another one that's Mr. Purcell notes. But Paul, what would be in your unofficial Super Bowl playbook if you could scribble in an addition?

Paul Verna:

One thing that doesn't get talked about a lot is permanence or staying power. We talk a lot about ads from year to year. We talk about what's most effective, and I think last year, obviously the conversation was centered around crypto. And look at where crypto is now. So yeah, those ads might've been interesting and effective, but they really didn't lead to long-term success.

Whereas if you look at... You mentioned Apple earlier. The 1984 ad for the Mac is still one of the most talked about ads of all time in the Super Bowl. It was a game-changer. It set Apple on the course that it's still in today in a very big way. I mean, they just sponsored the halftime show. So I think it's obviously hard to gauge that in the moment, but I think a real measure of Super Bowl ads is what happens over time. Did the campaign serve to really further your business, or was it just like a quick fix of something that got a lot of attention but didn't have staying power?

Marcus Johnson:

Yeah.

Paul Verna:

So I would definitely put that in my book.

Marcus Johnson:

All right. Well, that's it for the lead. It's time now for the post-game report. Paul, what's your one takeaway from the episode?

Paul Verna:

My biggest takeaway is that this was the Super Bowl of everything and nothing. We mentioned crypto last year. There were recent times when the Super Bowl leaned very heavily on social consciousness with ads like the throw like a girl or morning in America or the pandemic ads, but this time it was really just about a bunch of brands trying to get attention. And there were some funny ones, some interesting ones, some that I didn't think landed very well, but I think it was a year when people were able to just take it in for the entertainment value, focus on the game, but also enjoy some ads without feeling like they had to rally around a certain concept or trend.

Marcus Johnson:

Yeah. You mentioned the Crypto Bowl. Sarah Morrison of Recode thinks that if the hype over generative AI keeps up throughout the year, then next year's big game could be festooned with ads from all the tech companies showing off their new generative AI-boosted services in flashy ads featuring the biggest stars, or maybe just AI-generated versions of them, she writes. Maybe they'll call it the AI Bowl. We'll see.

Paul Verna:

I was expecting that to happen this year actually.

Marcus Johnson:

Oh, really?

Paul Verna:

I was expecting a lot more. And maybe it's just that ChatGPT has come into the mainstream really only in the last two months or so, so maybe a lot of campaigns were obviously already well in progress, but I definitely would've expected something like what happened with crypto last year to happen with AI this year.

Marcus Johnson:

Yeah.

Paul Verna:

So maybe next year.

Marcus Johnson:

But you've made this point of Google, in particular, has to be very careful with reputational damage, and so then maybe they wanted to, but they're treading much more lightly because of the ramifications of what can happen, as they saw with their share price, when you get this wrong.

Paul Verna:

Yeah, it's a fraught topic, so-

Marcus Johnson:

Mm-hmm.

Paul Verna:

... that's probably why brands steered away from it.

Marcus Johnson:

Yeah. That's what we've got time for, for this episode. Thank you, Paul, for hanging out today.

Paul Verna:

Always a pleasure.

Marcus Johnson:

And thanks to Victoria who edits the show and also knows the most popular ads of the entire Super Bowl. James, who copy edits the show, thank you to him. Thank you to Stuart who runs the team, and thanks to everyone listening in. We'll see you tomorrow, hopefully, for the Behind the Numbers Weekly Listen, eMarketer podcast made possible by Tinititi.

Congrats again to the Chiefs and any Chiefs fans out there. Philly fans, definitely hold your head up high. Heck of a game.