Q1 2019

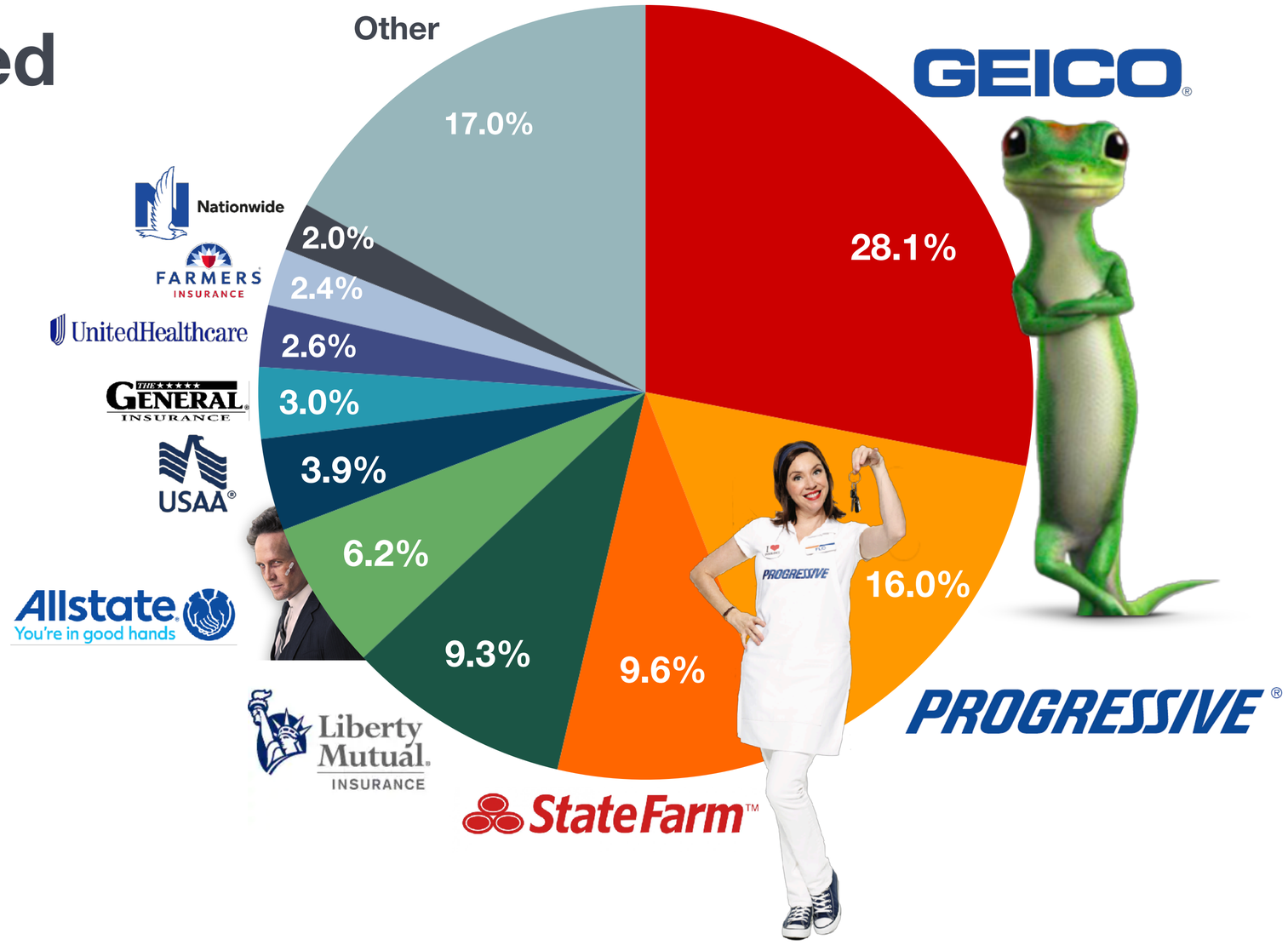
Media Mayhem! Gecko Attacks, Flo Fights Back

TV Ad Trends: Insurance

alphonso
The TV Data Company

Flo & the Gecko: Two brands dominated a crowded battlefield

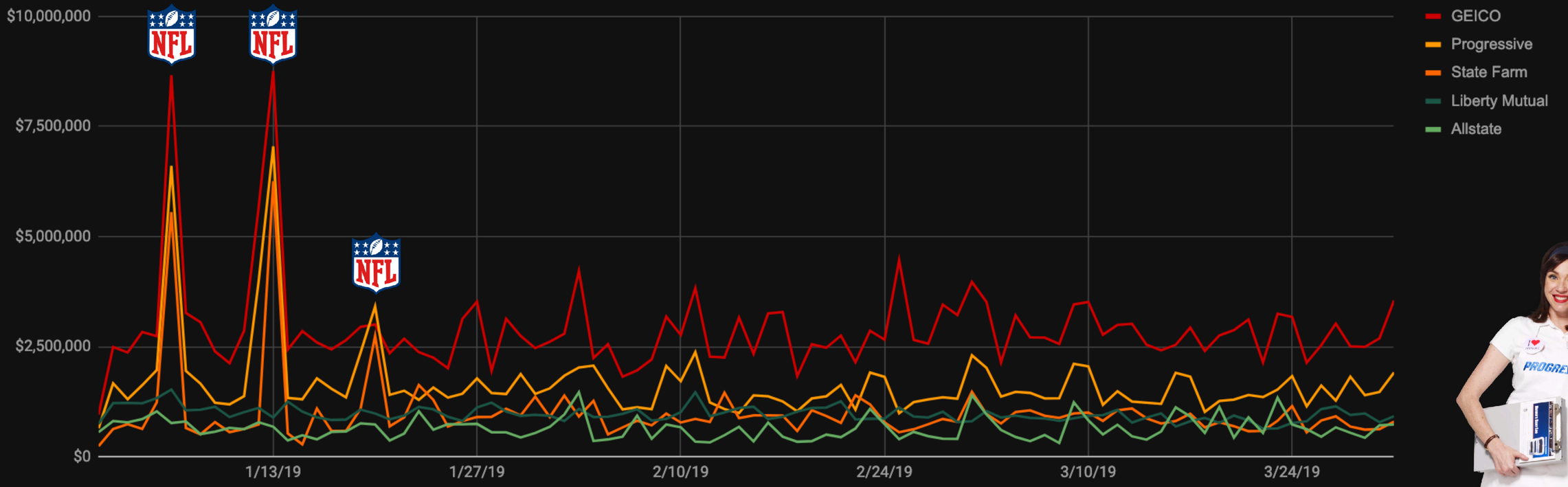
- 93 brands in the category had a total estimated spend of $937.6M
- Geico and Progressive made up nearly half the spend (44% combined)
- The top 10 brands made up over 80 percent of total spend
- Geico was the top spender in the group by a wide margin, while the Peyton Manning-led Nationwide campaign brought up the rear among the top 10



Source: Alphonso Insights, Q1 2019

Geico’s gecko ruled in impressions, but Progressive battled back with “Flo” While State Farm kept pace early on

During those early January weekends, both State Farm and Progressive increased spend and impression delivery to rival GEICO for the attention of NFL viewers. Here’s the spend among the top five (in millions)

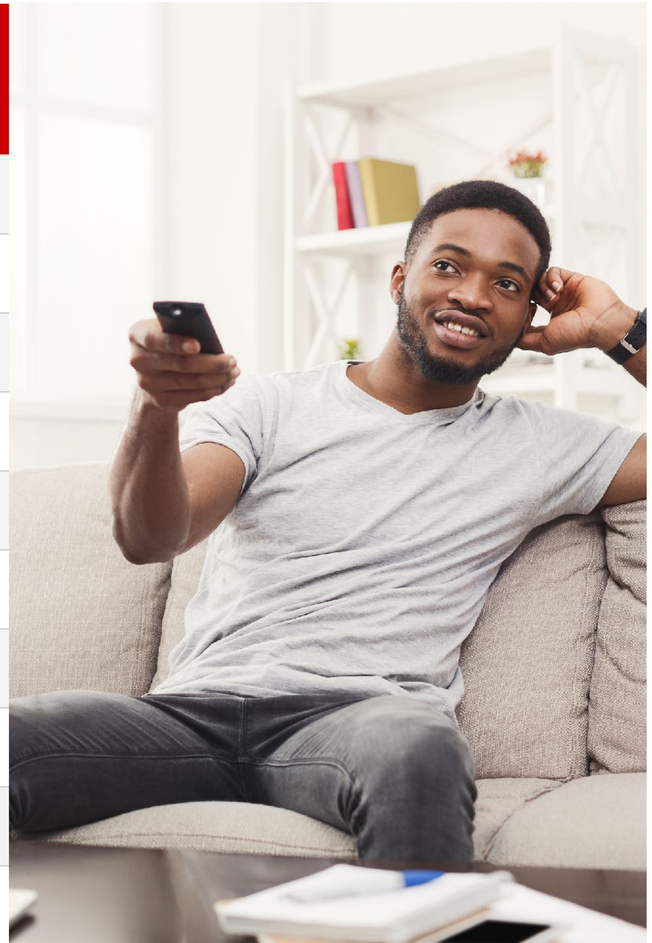


Source: Alphonso Insights, Q1 2019

The battle played out largely on broadcast networks, lead by CBS

Over a third (36.1%) of total ad spend in the category went to the large broadcast nets, followed by ESPN and the Turner Networks, CNN, TNT and TBS.

Top Networks by TV Ad Spend Insurance Category, Q1 2019	Spend ($M)
CBS	$123.0
NBC	$94.3
ABC	$61.5
FOX	$52.8
ESPN	$37.1
CNN	$28.6
TNT	$28.4
TBS	$28.3
HISTORY	$25.8
USA	$23.4



Sports programming is premium for insurance brands; NFL claims the most spend

The top three programs, plus five of the top 10 are centered around live sporting events including the NFL Playoffs and College Basketball

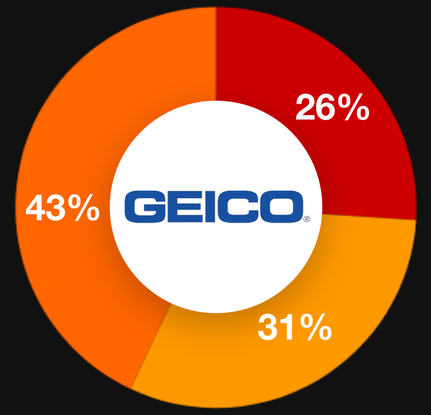
Top Shows by TV Ad Spend Insurance Category, Q1 2019	Spend ($M)
NFL Football	$50.3
College Basketball	$39.0
NBA Basketball	$18.5
SportsCenter	$13.8
The Big Bang Theory	$11.9
Law & Order: Special Victims Unit	$9.5
2019 NCAA Basketball Tournament	$8.6
PGA Tour Golf	$6.1
NBC Nightly News With Lester Holt	$5.9
Impractical Jokers	$5.8

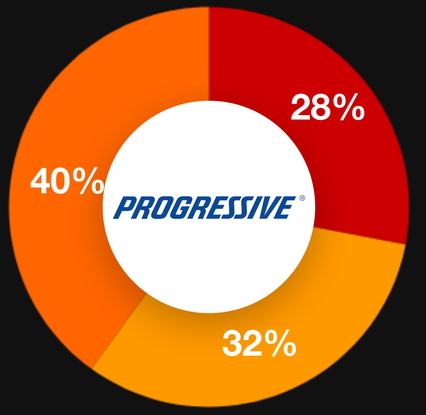
Source: Alphonso Insights, Q1 2019

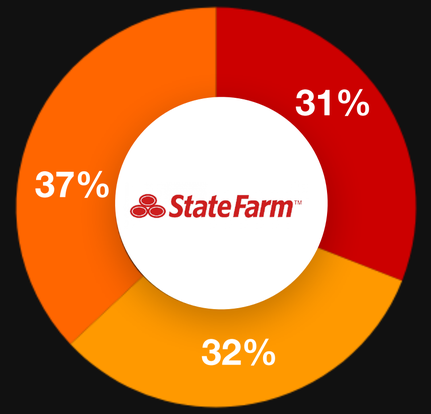
Mayhem menaces elders, leaving youngsters to the competition

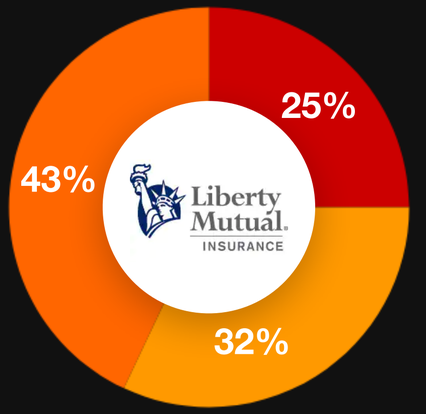
Among the top five:

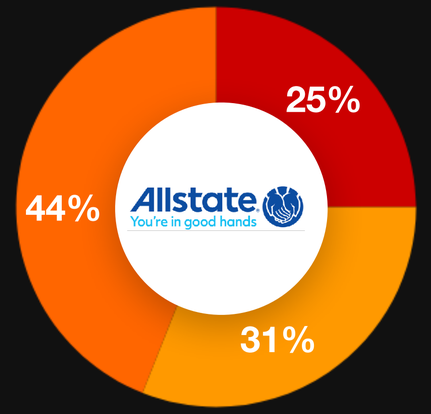
Allstate targets the oldest age group more, with Geico and Liberty Mutual skewing only slightly younger; meanwhile State Farm goes after a younger set









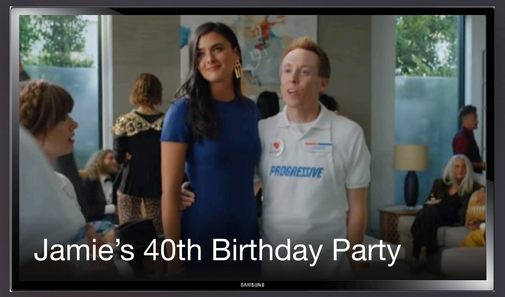


Source: Alphonso Insights, Q1 2019

Creative Samples

Q1 2019

PROGRESSIVE

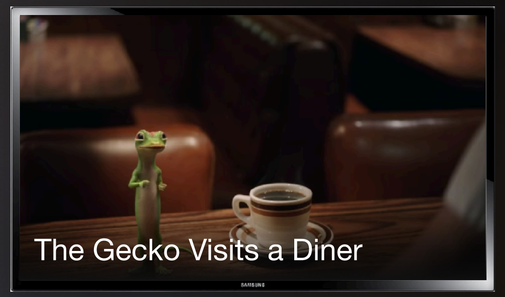


SPEND
$30.2M

AIRINGS
8817

VIEWABILITY
92.3%

GEICO



SPEND
$14.1M

AIRINGS
5236

VIEWABILITY
92.5%

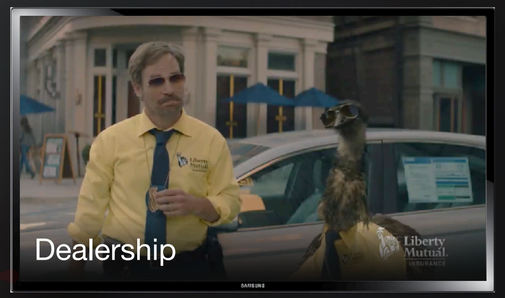
StateFarm

SPEND
$27.5M

AIRINGS
11296

VIEWABILITY
93.9%

Liberty Mutual



SPEND
$5.1M

AIRINGS
2993

VIEWABILITY
92.5%

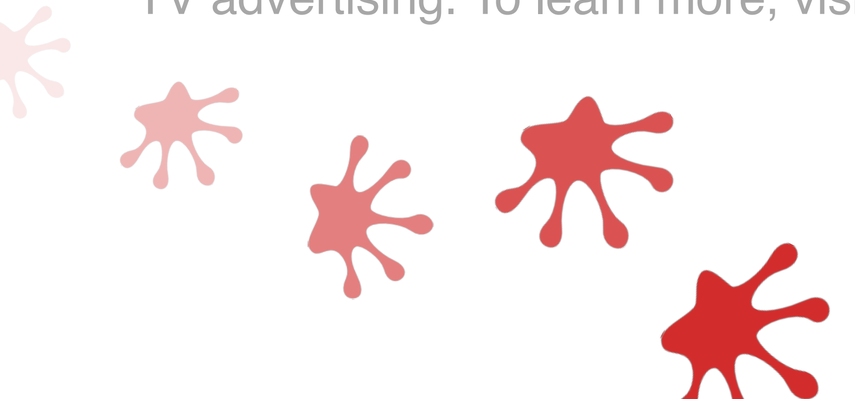
Allstate

SPEND
$22.4M

AIRINGS
8251

VIEWABILITY
92.6%

About Alphonso

Alphonso is a TV data and measurement company, and the market leader in providing brands and agencies with real-time TV ad campaign measurement, closed-loop attribution for TV ads, and TV audience extension across digital devices. Its Alphonso TV Data Cloud services are used by hundreds of the Fortune 500 brands and agencies in the U.S.

With video AI technology embedded in tens of millions of smart TVs, TV chipsets, set-top boxes and other connected devices, Alphonso understands what programming and advertising people watch on TV. Its SaaS offering, Alphonso Insights, delivers actionable TV measurement and closed-loop attribution with offline data in real time, to help brands understand the true impact of TV advertising. To learn more, visit www.alphonso.tv.