



Advertising Fact Sheet

September 2010

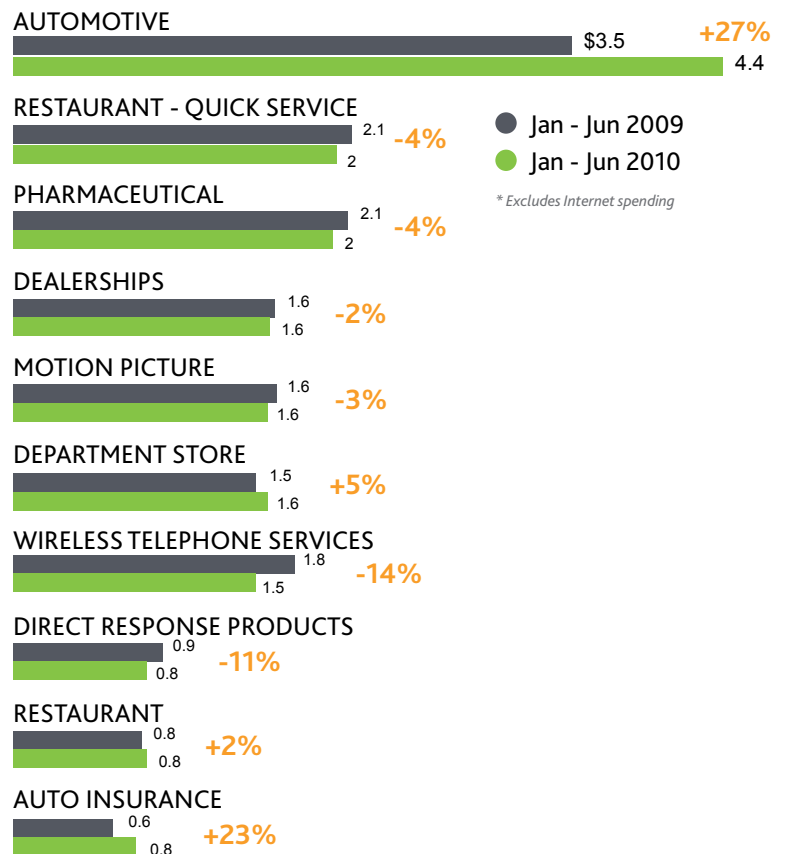
The Nielsen Company delivers the most comprehensive picture of how people consume media. In advance of the Advertising Week event in New York City, Nielsen has prepared this fact sheet to provide a high-level snapshot of advertising spending and effectiveness trends.



AD SPENDING OVERVIEW

- \$117B was spent on all U.S. advertising in 2009. 57% of all ad spending in 2009 went into Television, making it the largest medium for advertisers. Print media earned approximately 28% of ad dollars, while Internet earned 7% of all ad dollars.
- The top spending product category for national TV was Automotive with \$3.4B spent in 2009. The most significant growth by any one category among the top 20 was mobile phones, with national TV spend growing almost 200% to \$587M in 2009.
- Ad dollars spent in primetime in national television account for about 50% of total TV ad dollars.
- The 30-second commercial remains the television advertising standard in primetime, accounting for 54% of all commercials (2009). However, the number of 30-second commercials has decreased 5% in primetime, while the number of 15-second commercials has increased 6%.

TOP 10 PRODUCT CATEGORIES 1H 2010 vs. 2009, in billions



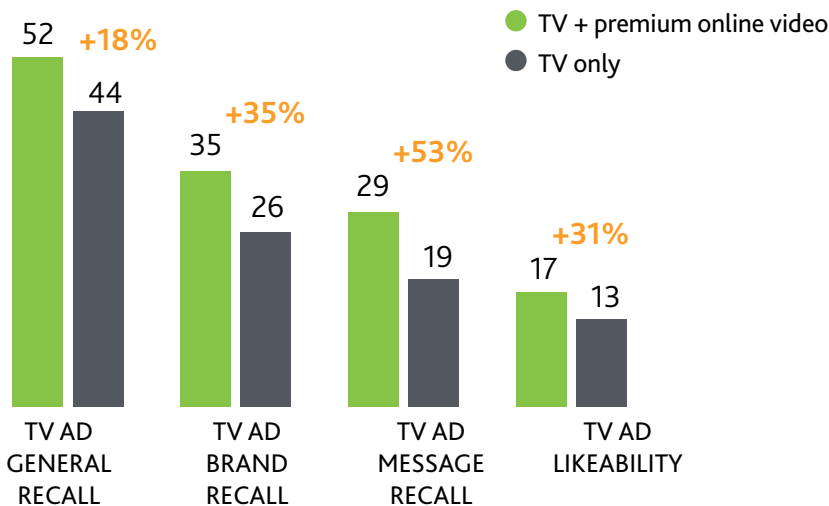
AD EFFECTIVENESS OVERVIEW

Technology advancements coupled with increased competition and interconnectivity has led to a marketplace of savvy consumers who must be engaged at the right time, through the right platforms and with the right messaging. In order to successfully compete in this environment, and make sure each dollar is spent on valuable campaigns, marketers are searching for ways to more accurately measure all aspects of their marketing performance.

Using industry-leading data, Nielsen's Advertising Effectiveness solutions provide clients concrete analysis of what we believe are the most critical aspects of measuring a campaign's success – the 4R's:

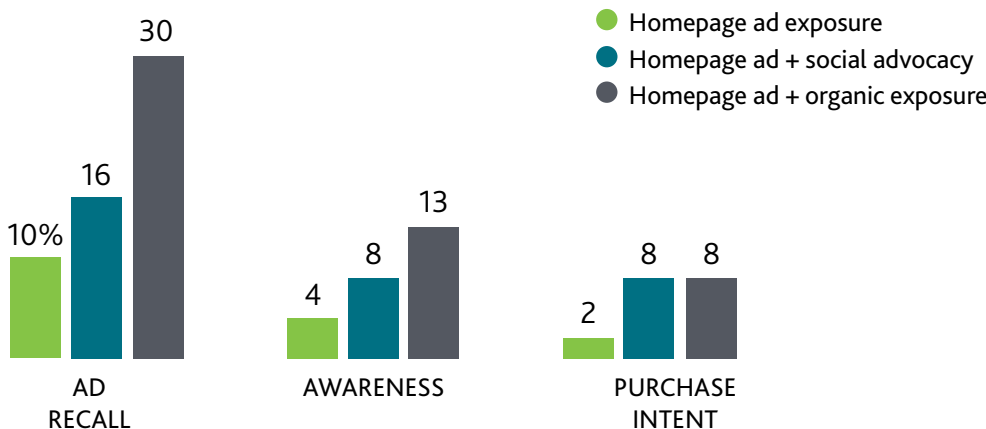
- **REACH**
Did the campaign reach the intended audience?
- **RECEPTIVITY**
Did the media environment deliver engaged viewers?
- **RESONANCE**
Did the campaign generate the desired brand effects?
- **REACTION**
Did the campaign generate the desired behavioral effects?

AD EFFECTIVENESS: TV + ONLINE VIDEO vs. TV-ONLY



TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. All metrics are significantly higher for TV+Premium Online Video exposure group at 90% confidence.

UNDERSTANDING THE IMPACT OF A SOCIAL MEDIA IMPRESSION



* Chart shows ad lift following social media ad exposure. Homepage ads are above-the-fold homepage ads that contain ad creative (image + text) as well as an option for users to engage with the brands (e.g. "Become a Fan"). Homepage ads with social advocacy include the names of a user's friends, if any, who are already fans of the brand. Organic impressions are social stories that appear on the homepage of friends of users who have engaged with brand or became a Fan of that brand.

IN-PROGRAM PLACEMENT EFFECTIVENESS

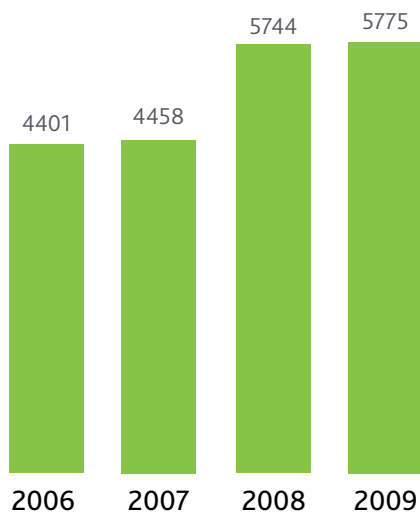
TOP 5 BRANDS: Brand Recall*

1. **OUTBACK STEAKHOUSE** on Survivor: Heroes vs. Villains: Contestants win meals from restaurant as a challenge prize
2. **CASTELLO DI AMOROSA WINERY** on The Bachelor: On the Wings of Love: Contestants go on a date at a winery
3. **MR. POTATO HEAD** on Modern Family: Luke uses a toy as part of a school project
4. **7 UP** on The Amazing Race 16: Contestants win money and soft drinks as a challenge prize
5. **1-800-FLOWERS** on Undercover Boss: CEO Chris McCann goes undercover in his company

**The Brand Recall Score ranks the percentage of TV viewers who can recall within 24 hours the brand/product of In-Program Placement during the normal course of viewing TV. Data based on the time period 1/1/10 - 8/28/10.

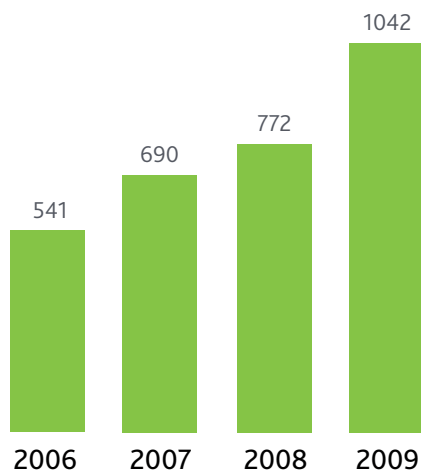
NUMBER OF MAJOR PRODUCT PLACEMENTS PER YEAR

OVERALL



* Includes 12 networks in Primetime with Ad/Sponsor Adjacency

DRAMAS & COMEDIES



* Includes 12 networks in Primetime with Ad/Sponsor Adjacency

TOP 5 MOST ENGAGING ENTERTAINMENT PROGRAMS

BROADCAST

1. Lost (ABC)
2. Chuck (NBC)
3. Romantically Challenged (ABC)
4. Scoundrels (ABC)
5. V (ABC)

CABLE

1. Army Wives (LIFE)
2. Justified (FX)
3. Men of a Certain Age (TNT)
4. Covert Affairs (USA)
5. Saving Grace (TNT)

Program Engagement measures viewer attention to TV episode content. Includes regularly-airing primetime series with at least three telecasts. Data based on the time period 1/1/10 - 8/28/10 among persons 13+.

TV ADVERTISING TOP 5: BRAND RECALL*

1. **DORITOS**
Super Bowl: Man lays in casket full of snack chips (:30)
2. **DORITOS**
Super Bowl: Young boy slaps mother's date (:30)
3. **TIDE**
Charity program contributes to disaster relief (:30)
4. **DORITOS**
Super Bowl: Dog takes off shock collar and puts in on man (:30)
5. **BUDWEISER**
Super Bowl: Clydesdale and calf race each other along fence (:60)

***The Brand Recall Score is the percentage of TV viewers who can recall within 24 hours the brand of an ad they were exposed to during the normal course of viewing TV. Data based on new ads launching in the time period 1/1/10 - 8/28/10.*

For more information, contact your Nielsen representative at 800-988-4226 or visit www.nielsen.com