



You dream it. We deliver it.

Video Effectiveness Research

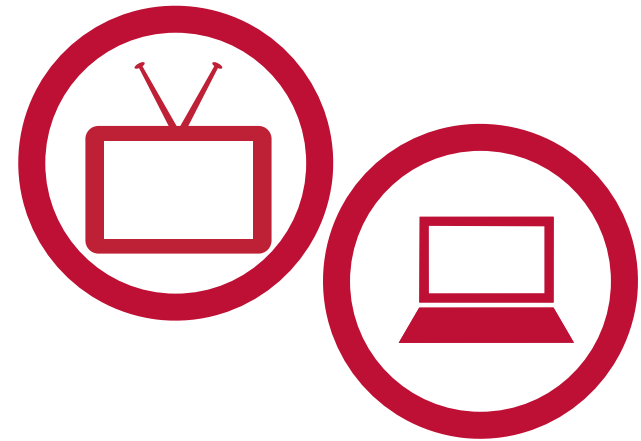
Microsoft Advertising



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The rise of online video



In an overall down year for online advertising,
online video ad spending grew **41%** in 2009.

And there are now 144 million online video viewers, penetrating
72% of all internet users.

Online video outpaces TV when measured by the dollars marketers spend relative to the amount of time individuals spend viewing video.

Research objectives & methodology

This 3rd party research establishes a baseline for online video advertising effectiveness, in comparison and as a complement to TV advertising. The research also provides data regarding performance of repurposed versus original advertising creative.

The Nielsen IAG study

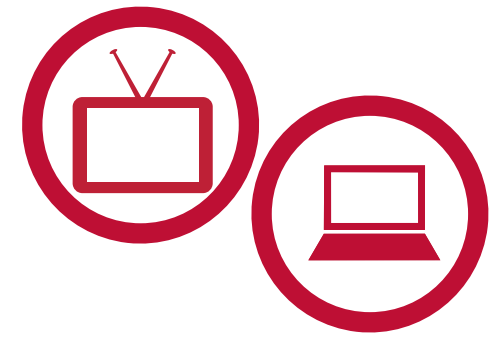
Execution of Nielsen IAG study

- Research measures brand impact of ads by surveying a panel of:
 - Viewers who have watched ads in TV programs
 - Viewers who have watched ads in long-form online video
 - Viewers who have watched ads in long-form online video 7 days prior to seeing the products' ads on TV

Included in the study

- 238 brands
- 412 products
- 951 ad executions
- 14,333 completed surveys (7,476 in day-after period)
- 1½ years of data (11/2007-05/2009)

Research Summary



Online Video vs. TV

Online video performed better than TV across every brand metric and for every vertical, especially for the following verticals:

- Apparel
- Beer/Liquor
- Beverages
- Snack Foods

Online Video + TV

A campaign combining online video and TV ads improved recall and likeability for all verticals. The strongest verticals for Video+TV were:

- Auto
- Food and Beverage
- Personal Care

Repurposed TV vs. Original Online Ads

Overall, repurposed TV ads are as effective as original online video ads. The data varies by vertical:

- Repurposed TV ads worked best for Finance/Insurance/Real Estate
- Original online ads worked best for Travel

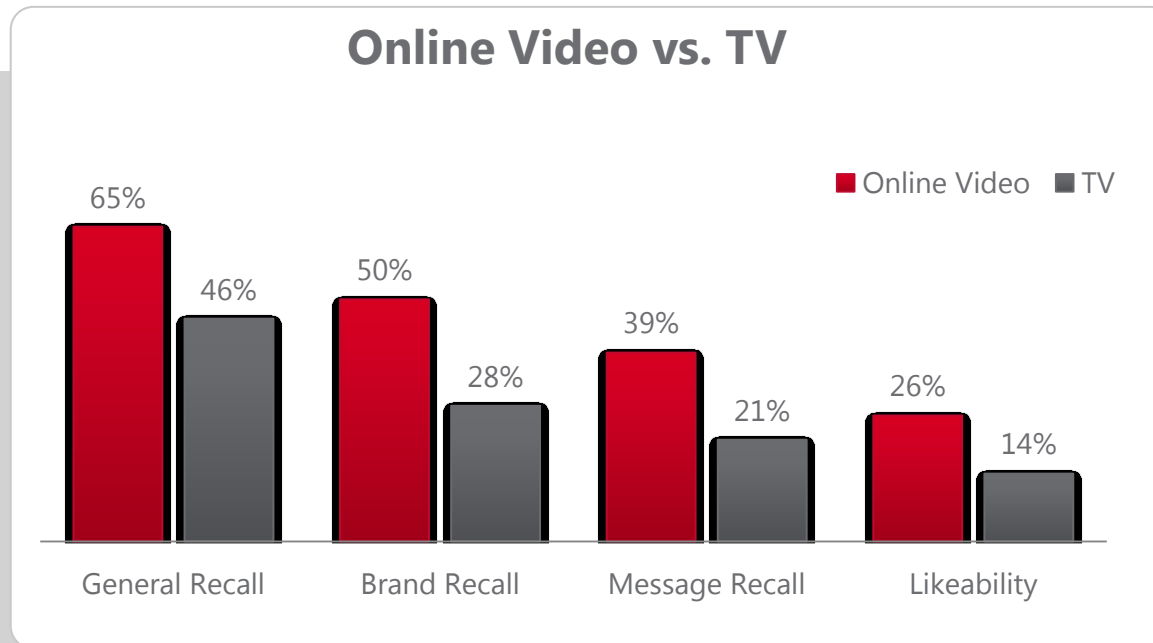
Methodology & definitions of key metrics

The following four metrics were surveyed across all campaigns:

- 1 General recall:** Did those exposed to the ad remember the overall creative concept of it?
- 2 Brand recall:** Did those exposed to the ad remember the brand the day after exposure?
- 3 Message recall:** Did those exposed to the ad remember the primary message of the ad the day after exposure?
- 4 Likability:** Did those exposed to the ad remember the brand the day after exposure and report to like the ad “a lot” or “somewhat”?

Online video ads outperform TV ads on every metric

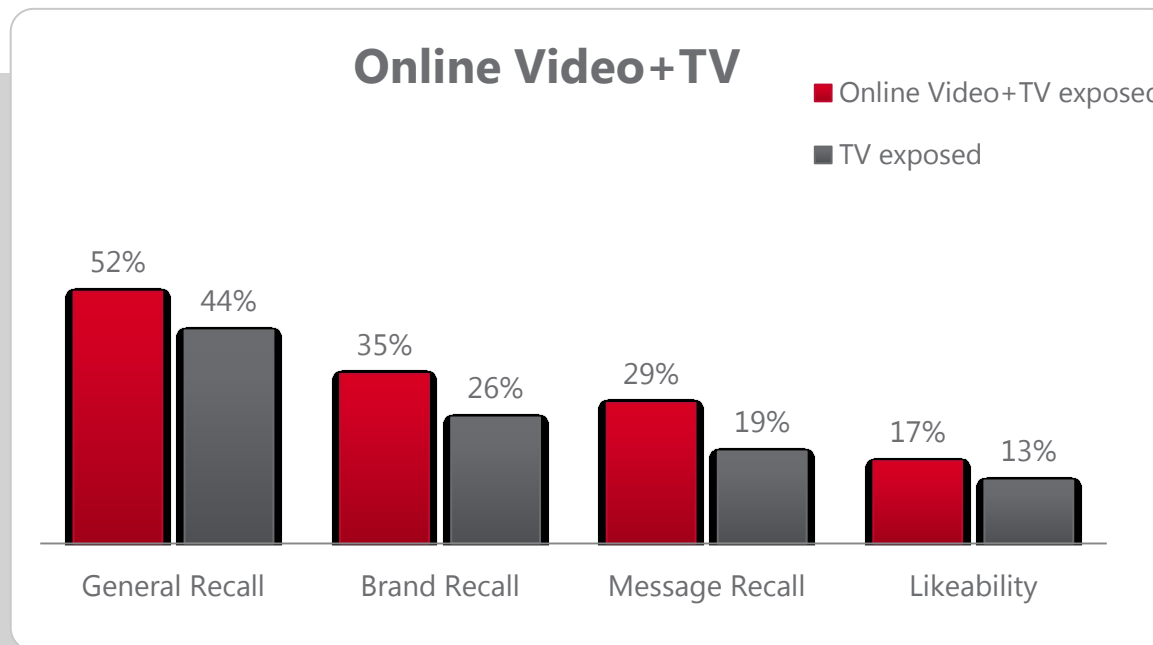
- 39% of those exposed to online video ads **recalled the message** versus 21% for the TV ads, **+86% in message performance**.
- 26% of those exposed to online video ads **perceived the ads as likeable** versus 14% for the TV ads, **+86% in likeability**.



Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. TV norms are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary.

Online video ads increase the efficacy of TV spots

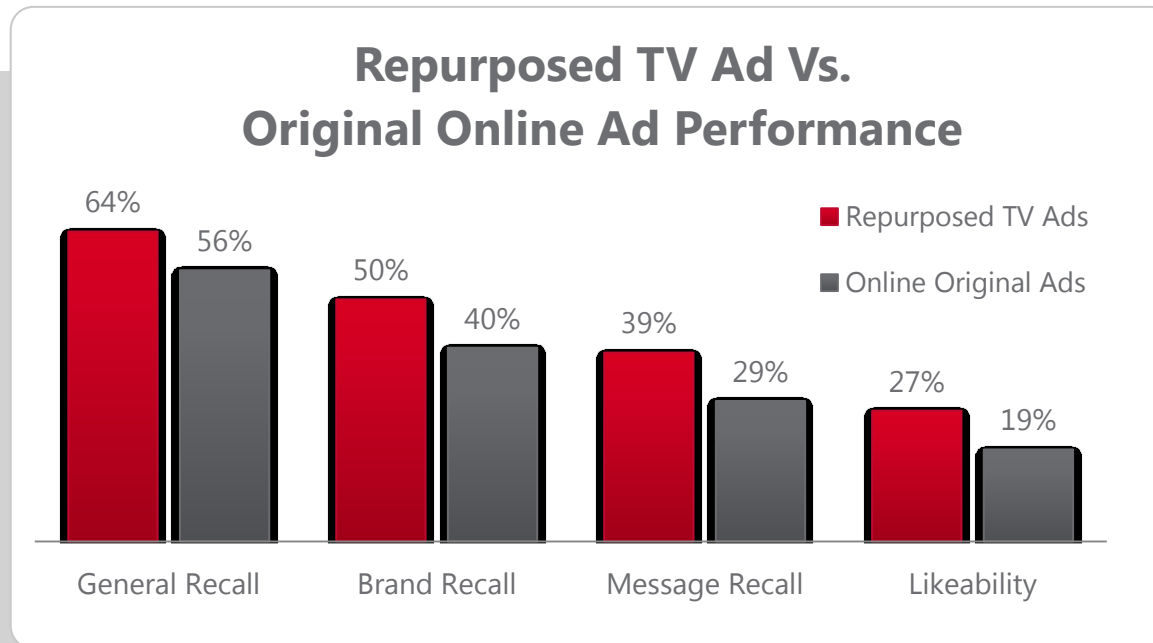
- 29% of those exposed to both online video and TV ads **recalled the message** versus 19% for the TV ads alone, **+53% in message performance**.
- 17% of those exposed to both online video and TV ads **perceived the ads as likeable** versus 13% for the TV ads alone, **+31% in likeability**.



Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. 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. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product

Repurposed TV ads are as effective as online original ads

- 39% of those exposed to repurposed TV ads **recalled the message** versus 29% for the online original ads, **+34% in message performance**.
- 27% of those exposed to repurposed TV ads perceived the **ads as likeable** versus 19% for the online original ads, **+42% in likeability**.



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

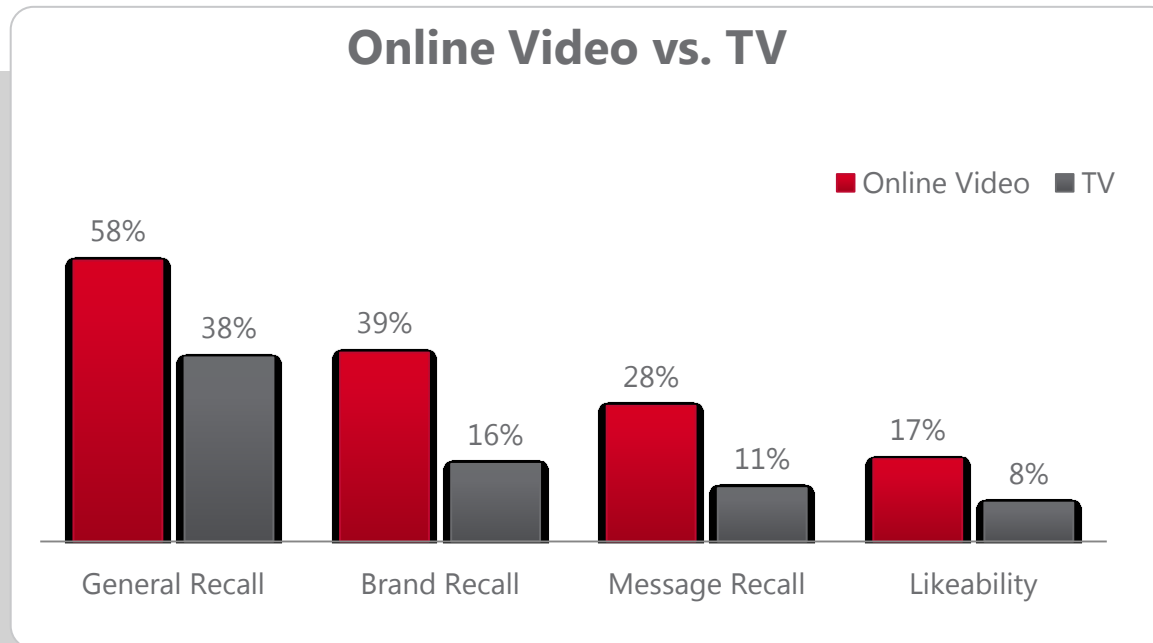
Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag

Auto



Auto online video ads outperformed auto TV ads on every metric

- 39% of those exposed to online video ads recalled the **auto brand** versus 16% for the TV ads, **+144% in brand performance.**
- 28% of those exposed to online video ads recalled the **auto message** versus 11% for the TV ads, **+155% in message performance.**



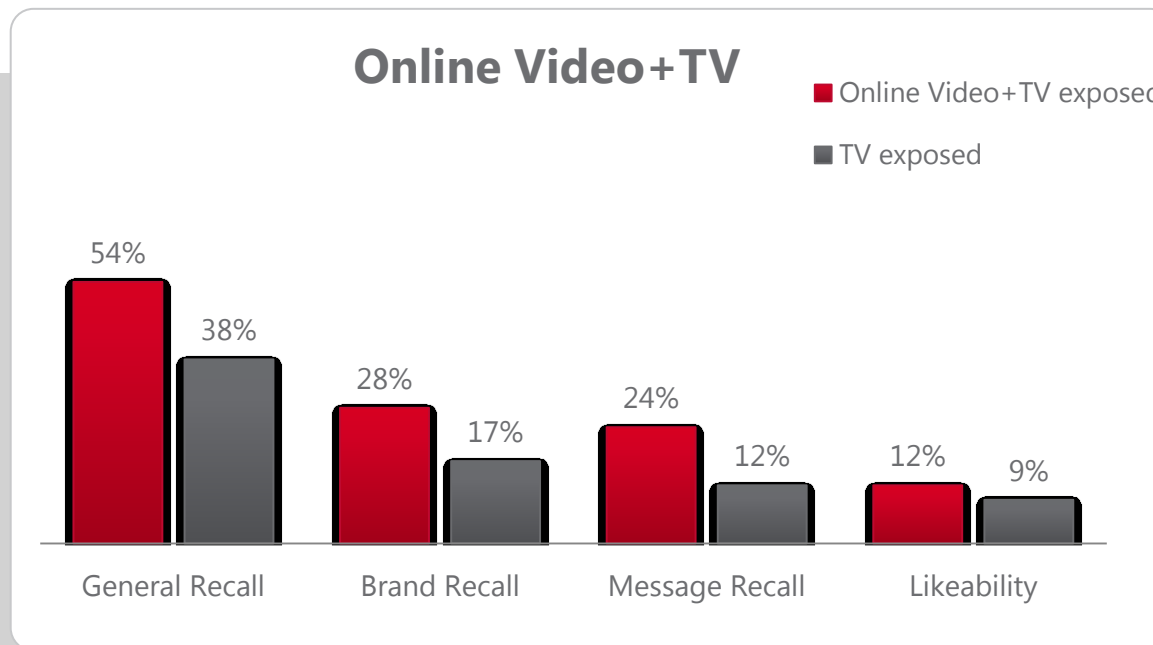
Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. TV norms are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary.





Auto online video ads increase the efficacy of auto TV spots

- 28% of those exposed to both online video and TV ads recalled the **auto brand** versus 17% for the TV ads alone, **+65% in brand performance**.
- 24% of those exposed to both online video and TV ads recalled the **auto message** versus 12% for the TV ads alone, **+100% in message performance**.



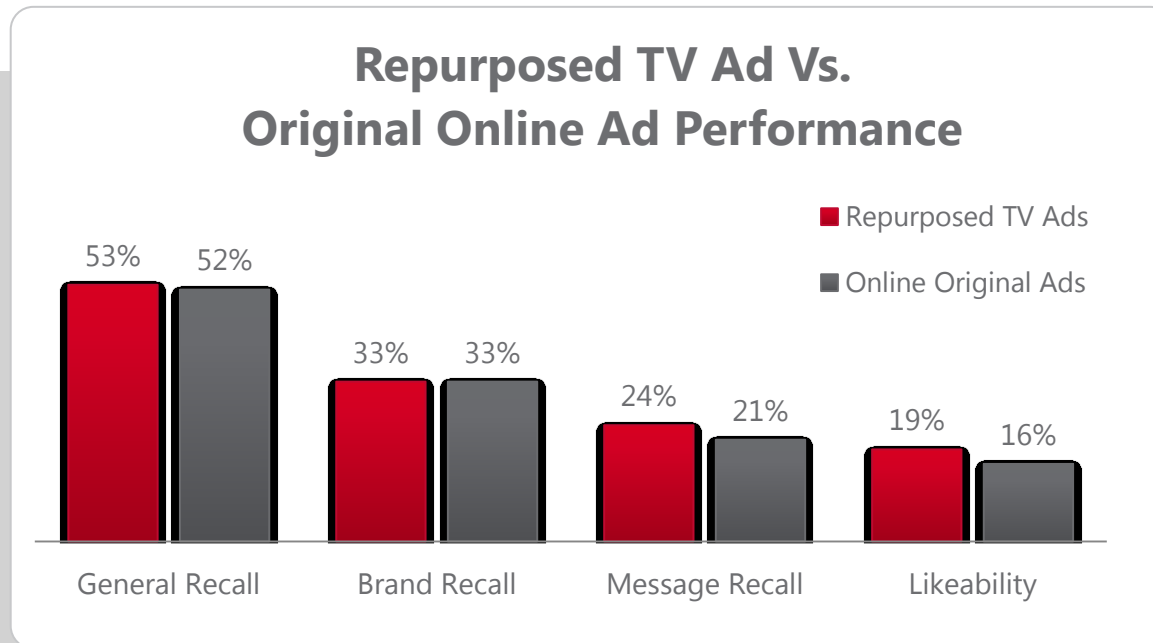
Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product





Auto repurposed TV ads are as effective as auto online original ads

- 24% of those exposed to repurposed TV ads recalled the **auto message** versus 21% for the online original ads, **+14% in message performance**.
- 19% of those exposed to repurposed TV ads perceived the **auto ads as likeable** versus 16% for the online original ads, **+19% in likeability**.



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag

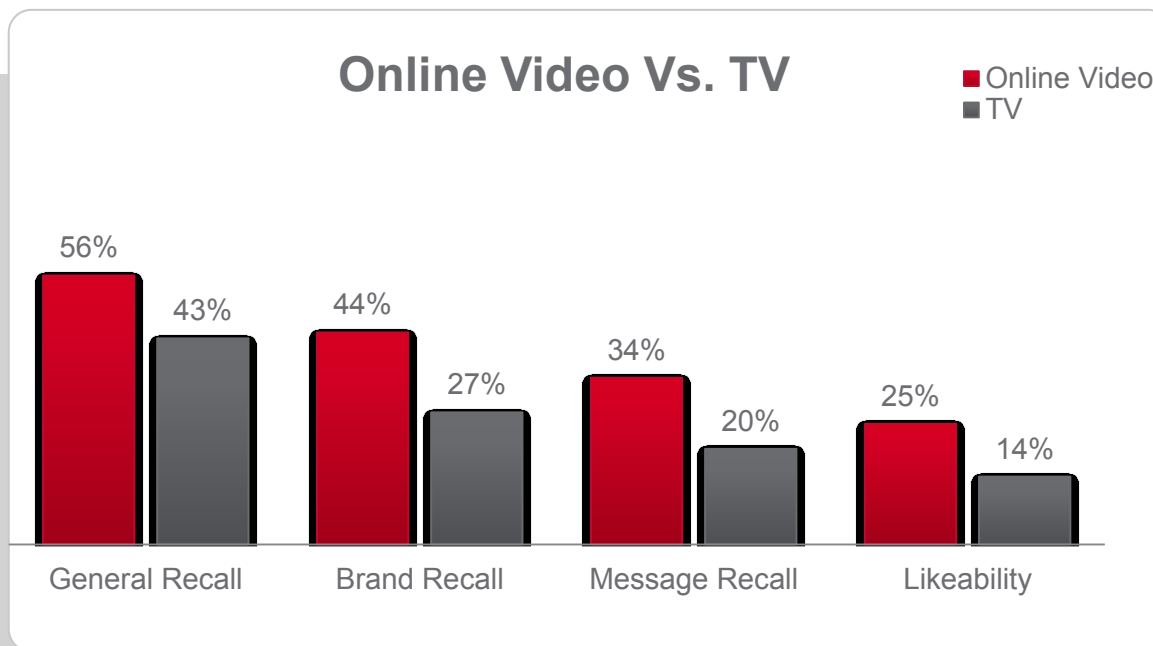


Retail



Retail online video ads outperform retail TV ads on every metric

- 34% of those exposed to online video ads recalled the **retail message** versus 20% for the TV ads, **+75% in message performance**.
- 25% of those exposed to online video ads perceived the **retail ads as likeable** versus 14% for the TV ads, **+78% in likeability**.

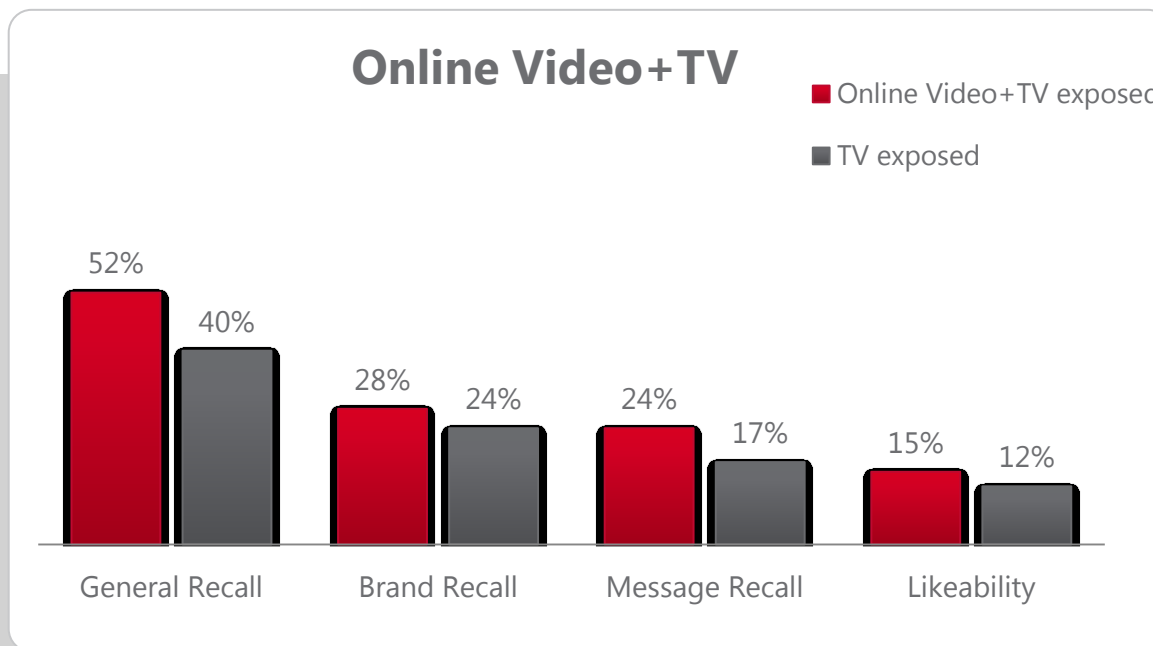


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Retail online video ads increase the efficacy of retail TV spots

- 24% of those exposed to both online video and TV ads recalled the **retail message** versus 17% for the TV ads alone, **+41% in message performance**.
- 15% of those exposed to both online video and TV ads perceived the **retail ad as likeable** versus 12% for the TV ads alone, **+25% in likeability**.

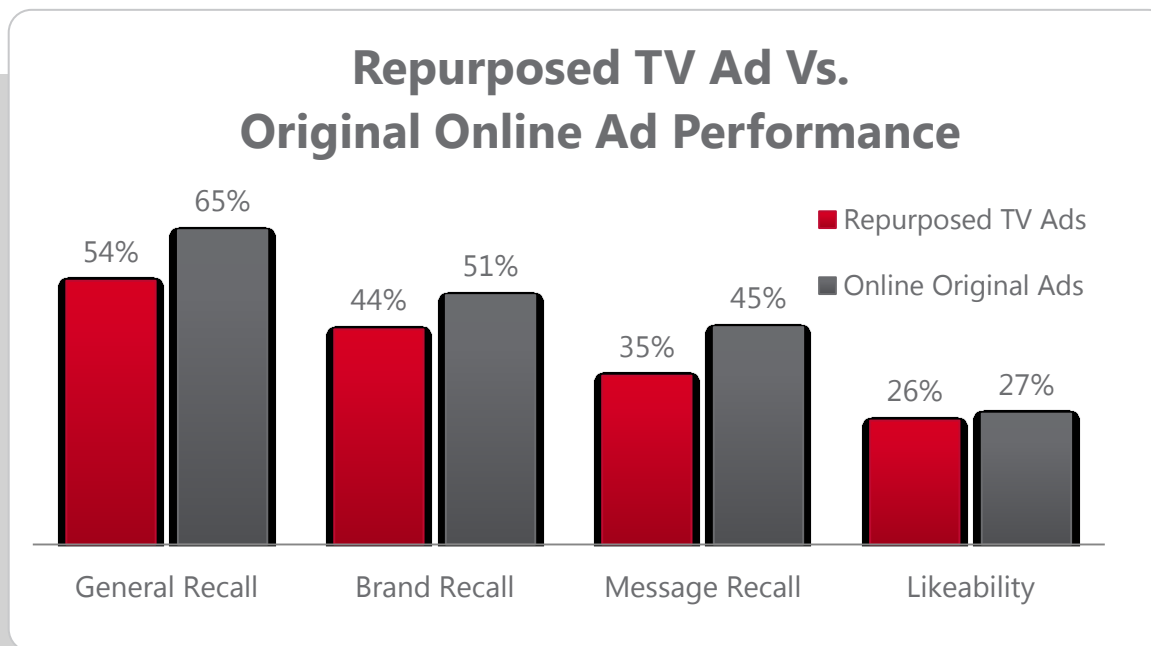


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product



Retail repurposed TV ads are as effective as retail online original ads

- 35% of those exposed to repurposed TV ads recalled the **retail message** versus 45% for the online original ads, **+29% in message performance for online original ads.**
- 26% of those exposed to repurposed TV ads perceived the **retail ads as likeable** versus 27% for the online original ads, **+6% in likeability for online original ads.**



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

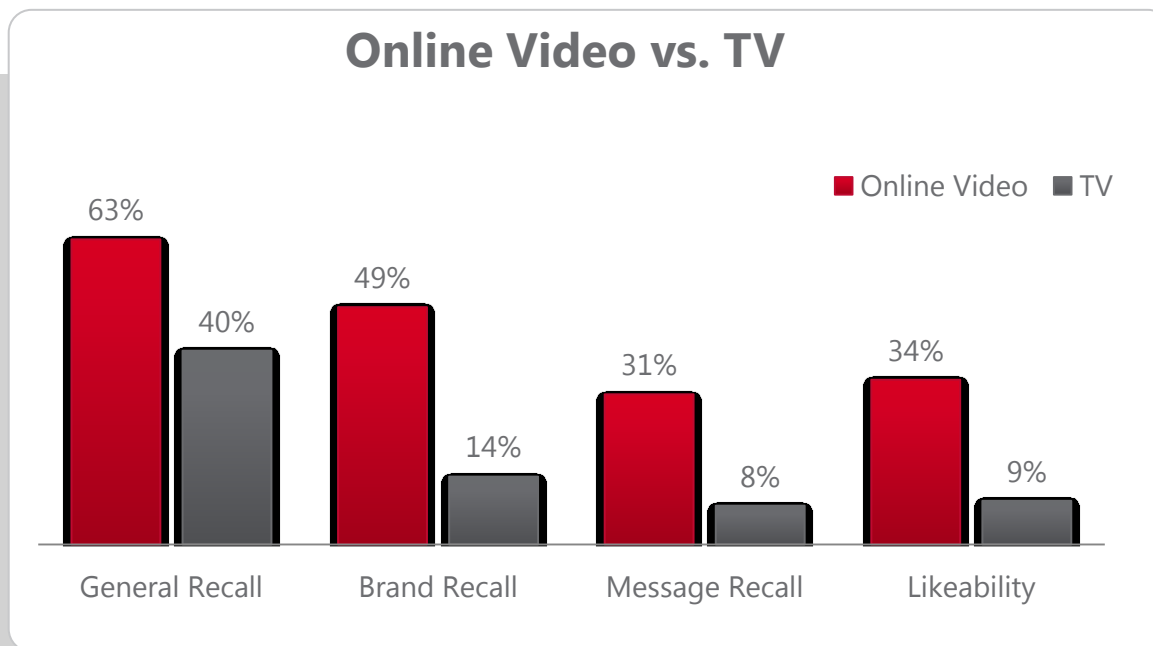
Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag





Apparel online video ads outperform apparel TV ads on every metric

- 31% of those exposed to online video ads recalled the **apparel message** versus 8% for the TV ads, **+288% in message performance**.
- 34% of those exposed to online video ads perceived the **apparel ads as likeable** versus 9% for the TV ads, **+278% in likeability**.

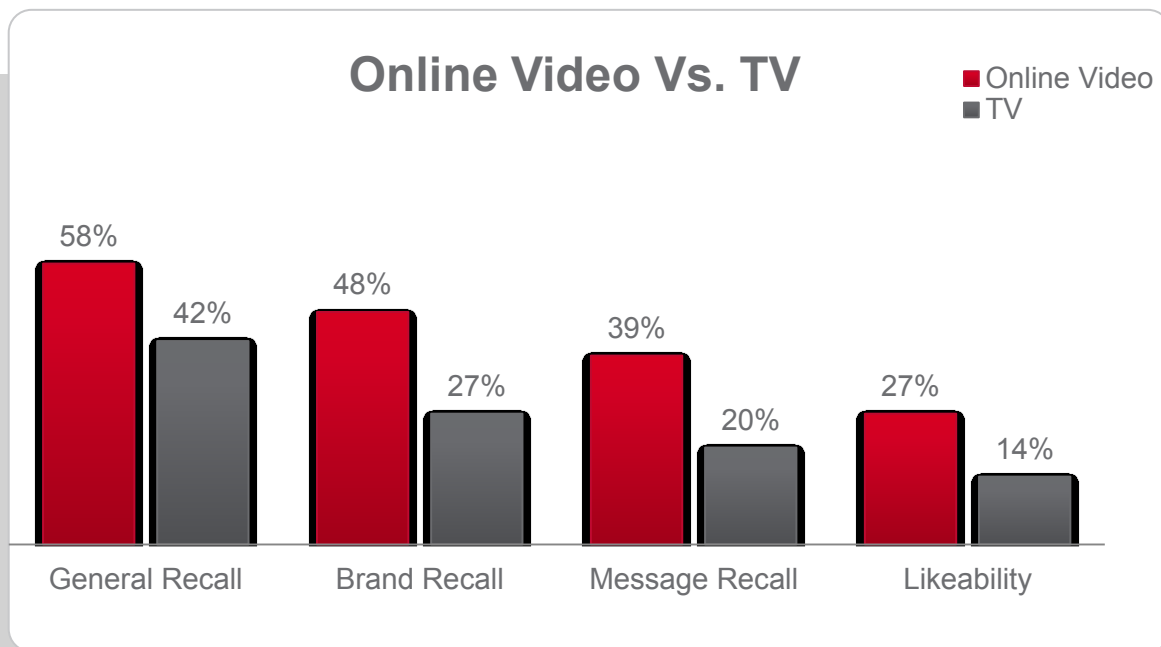


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Department/discount store online video ads outperform TV ads on every metric

- 39% of those exposed to online video ads recalled the **department/discount store message** versus 20% for the TV ads, **+95% in message performance**.
- 27% of those exposed to online video ads perceived the **department/discount store ads as likeable** versus 14% for the TV ads, **+93% in likeability**.



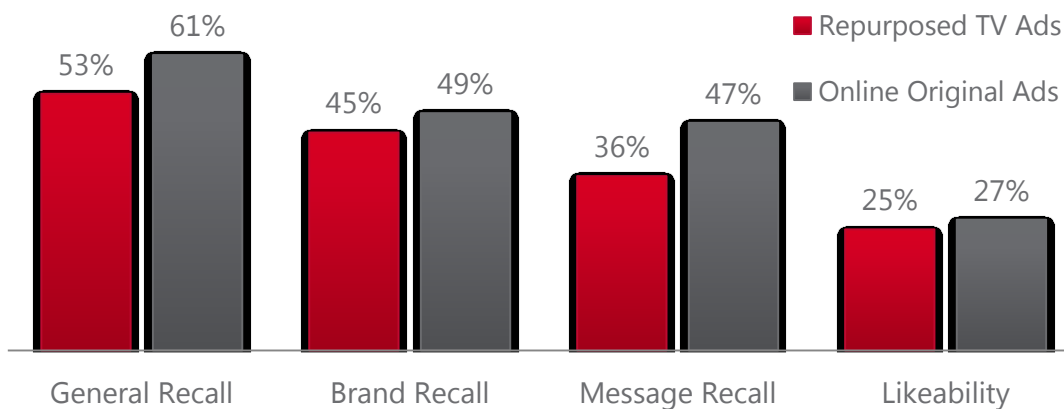
Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Department/discount store repurposed TV ads are as effective as the online original ads

- 36% of those exposed to repurposed TV ads recalled the **department/discount store message** versus 47% for the online original ads, **+31% in message performance for online original ads.**
- 25% of those exposed to repurposed TV ads perceived the **department/discount store ads as likeable** versus 27% for the online original ads, **+8% in likeability for online original ads.**

Repurposed TV Ad Vs. Original Online Ad Performance



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

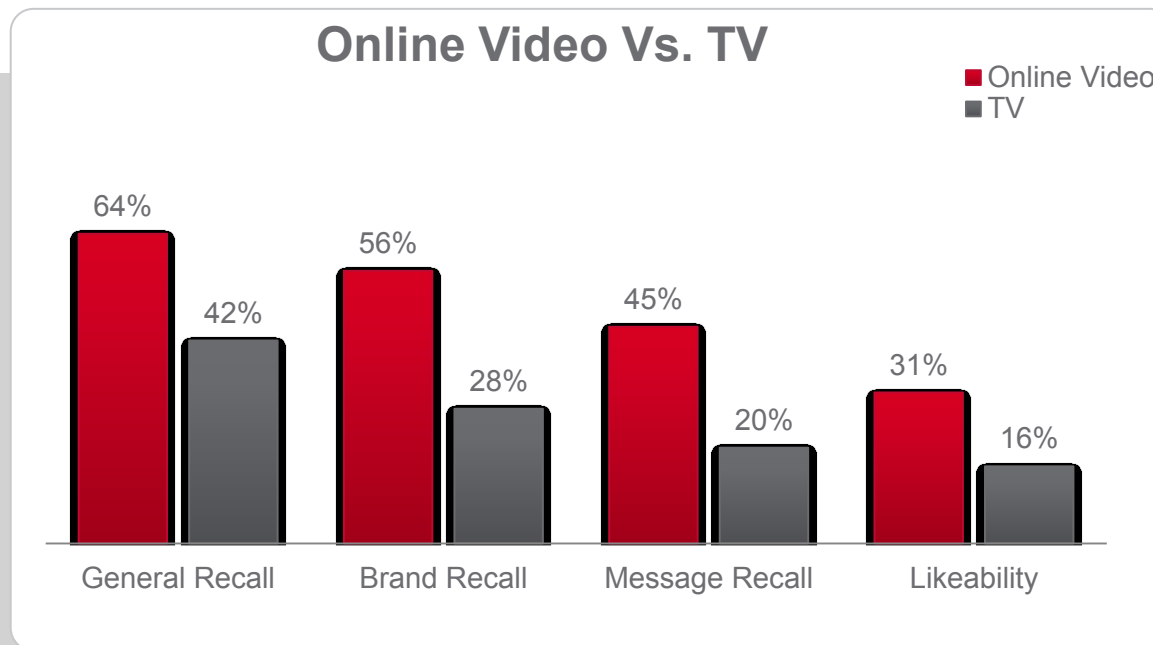
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Food & beverage



Food & beverage online video ads outperform the TV ads on every metric

- 45% of those exposed to online video ads recalled the **food & beverage message** versus 20% for the TV ads, **+126% in message performance**.
- 31% of those exposed to online video ads perceived the **food & beverage ads as likeable** versus 16% for the TV ads, **+96% in likeability**.

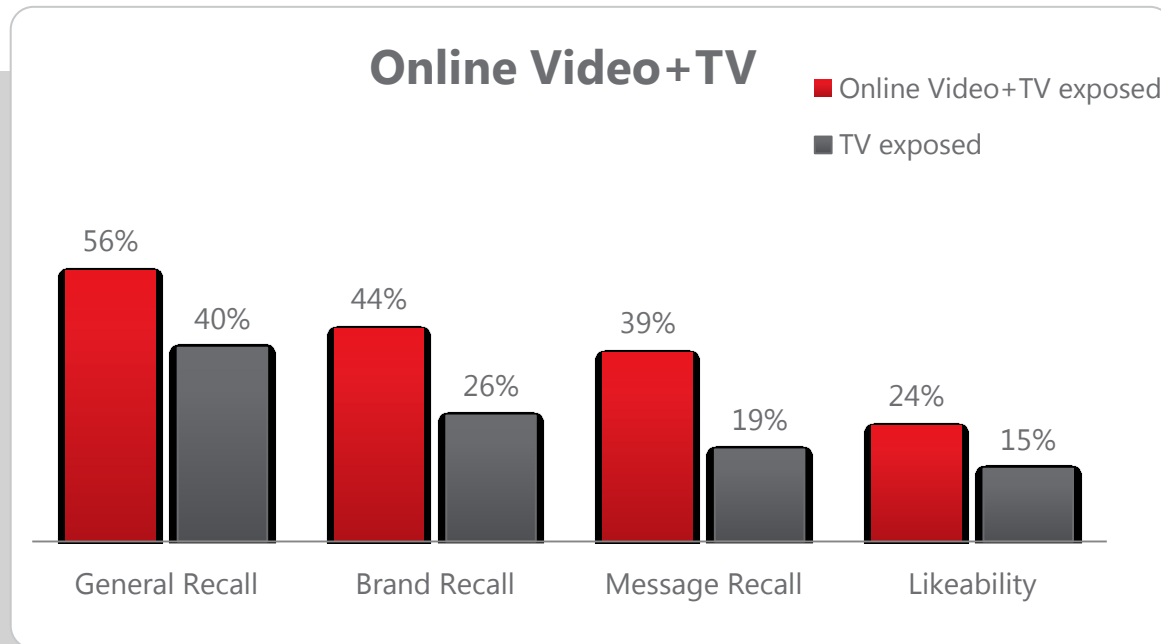


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Food & beverage online video ads increase the efficacy of food & beverage TV spots

- 39% of those exposed to both online video and TV ads recalled the **food & beverage message** versus 19% for the TV ads alone, **+105% in message performance**.
- 24% of those exposed to both online video and TV ads perceived the **food & beverage ads as likeable** versus 15% for the TV ads alone, **+60% in likeability**.

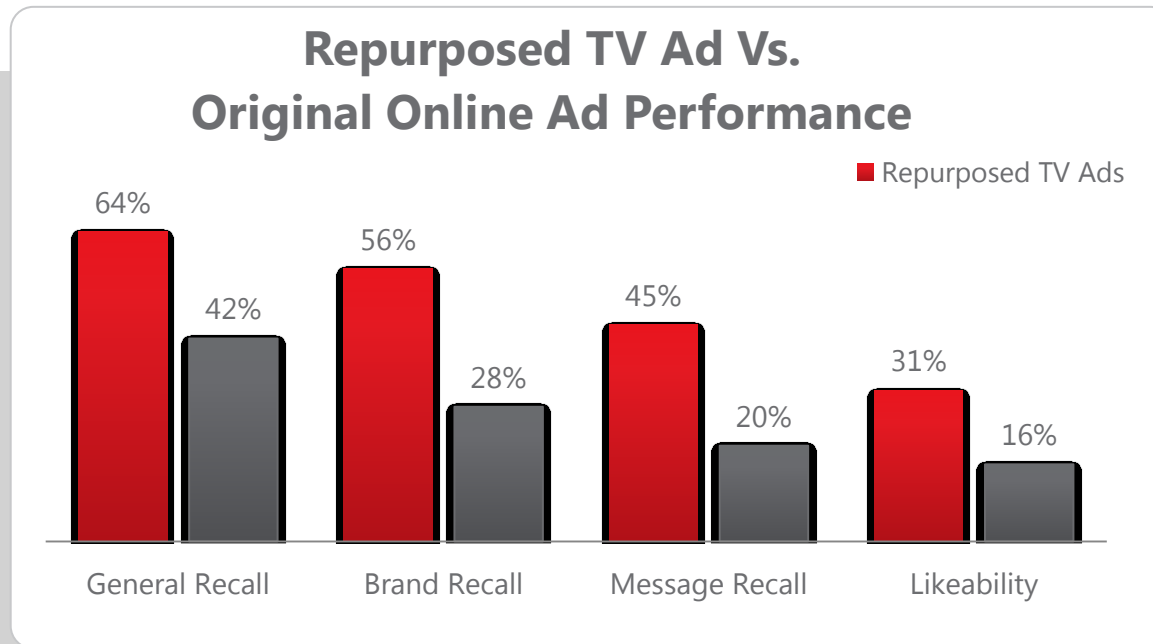


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product



Food & beverage repurposed TV ads are as effective as online original ads

- 45% of those exposed to repurposed TV ads recalled the **food & beverage brand message** versus 20% for the online original ads, **+126% in message performance**.
- 31% of those exposed to repurposed TV ads perceived the **food & beverage ads as likeable** versus 16% for the online original ads, **+96% in likeability**.



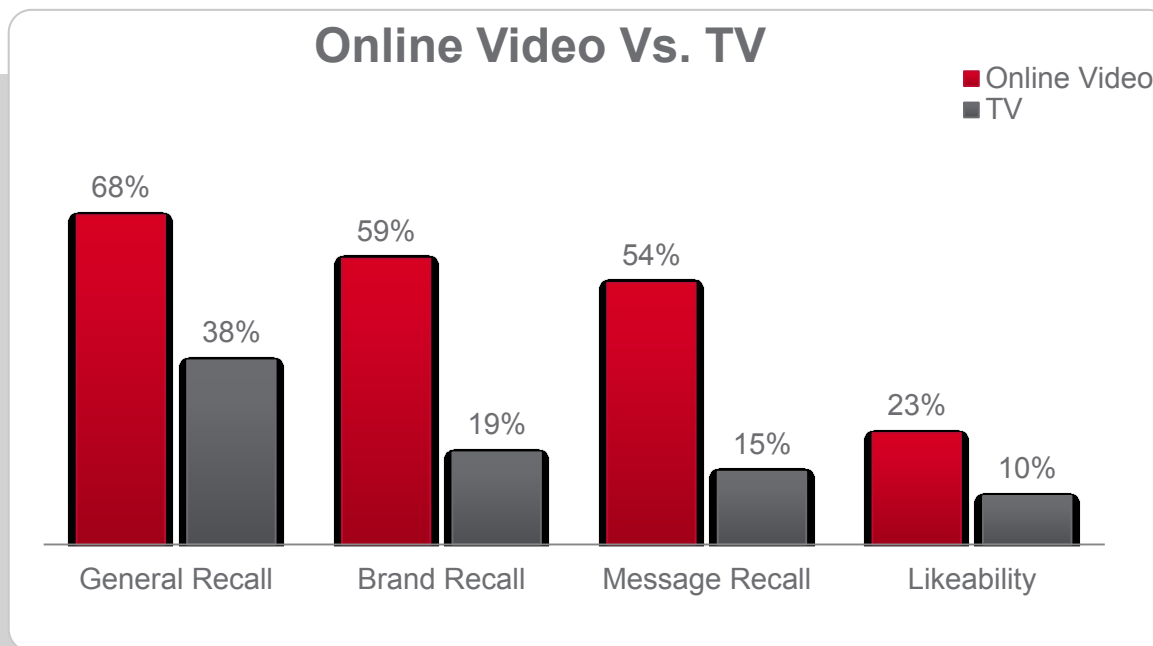
Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag



Beer/liquor online video ads outperform the beer/liquor TV ads on every metric

- 54% of those exposed to online video ads recalled the **beer/liquor message** versus 15% for the TV ads, **+260% in message performance**.
- 23% of those exposed to online video ads perceived the **beer/liquor ads as likeable** versus 10% for the TV ads, **+130% in likeability**.

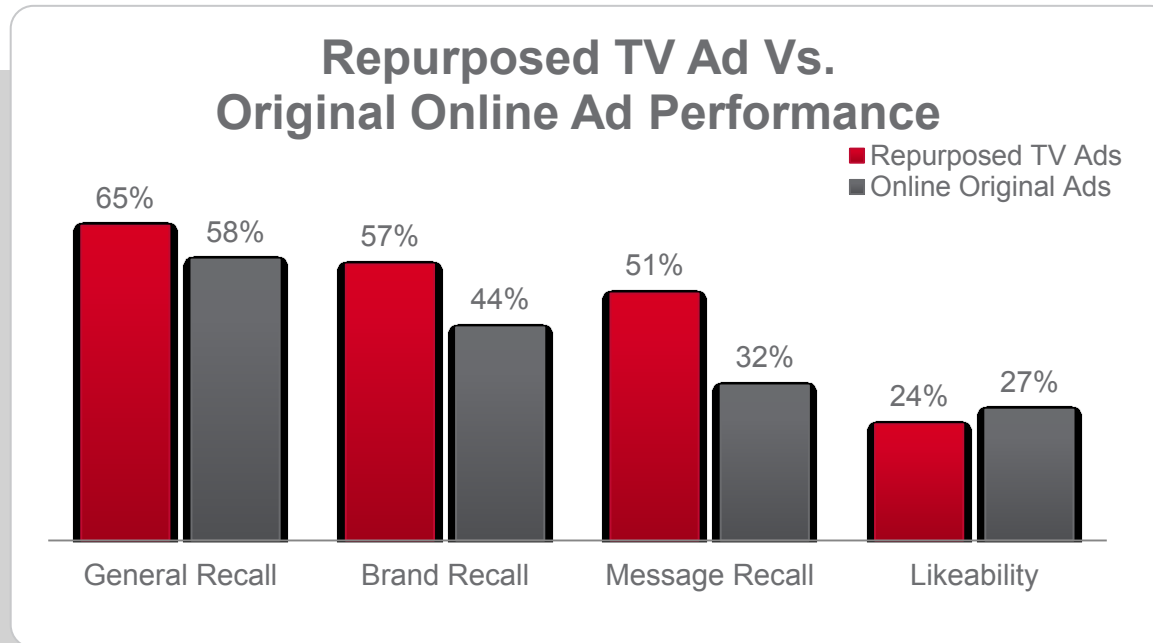


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Beer/liquor repurposed TV ads are as effective as beer/liquor online original ads

- 57% of those exposed to repurposed TV ads recalled the **beer/liquor brand** versus 44% for the online original ads, **+30% in brand performance**.
- 51% of those exposed to repurposed TV ads recalled the **beer/liquor message** versus 32% for the online original ads, **+59% in message performance**.



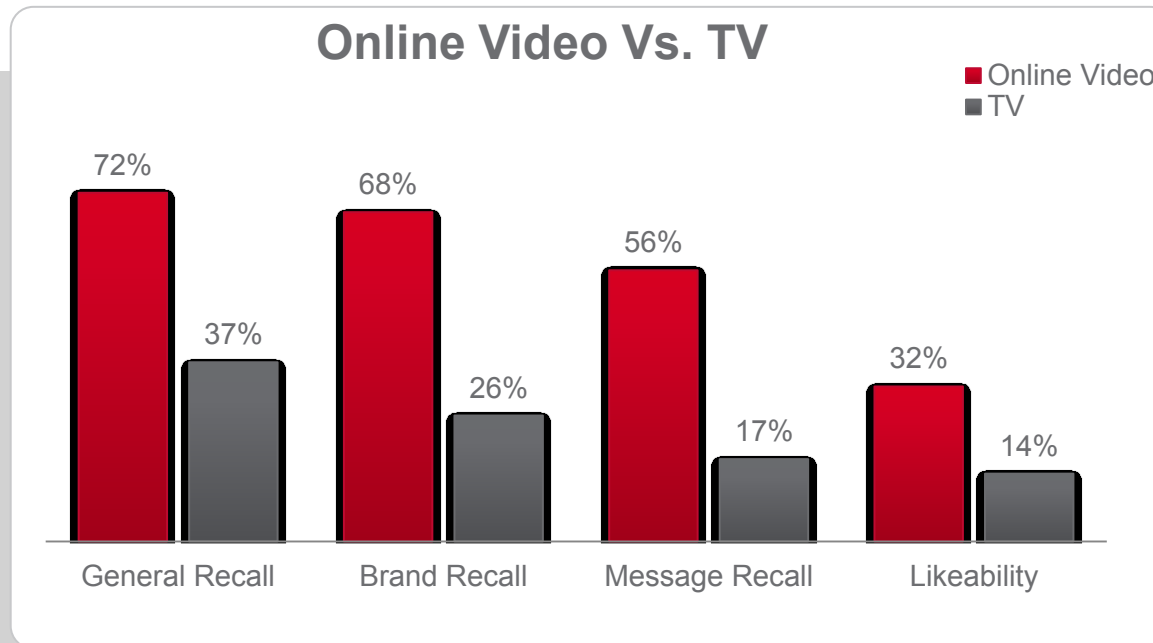
Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag



Beverage online video ads outperform the beverage TV ads on every metric

- 56% of those exposed to online video ads recalled the **beverage message** versus 17% for the TV ads, **+229% in message performance**.
- 32% of those exposed to online video ads perceived the **beverage ads as likeable** versus 14% for the TV ads, **+129% in likeability**.



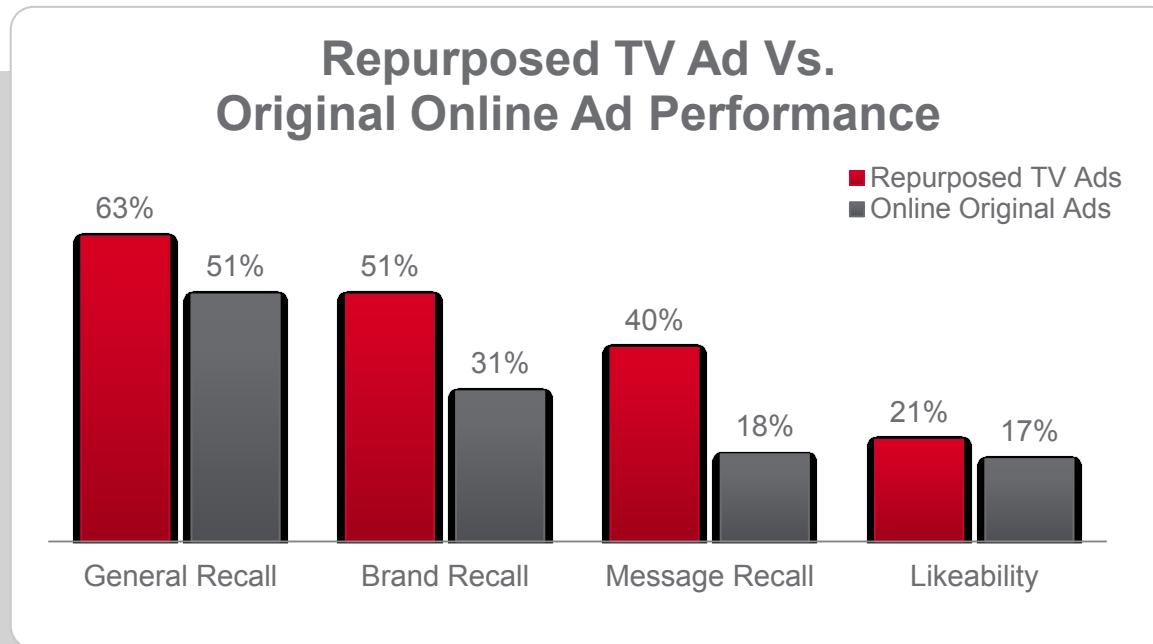
Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary





Beverage repurposed TV ads are as effective as beverage online original ads

- 40% of those exposed to repurposed TV ads recalled the **beverage message** versus 18% for the online original ads, **+122% in message performance**.
- 21% of those exposed to repurposed TV ads perceived the **beverage ads as likeable** versus 17% for the online original ads, **+24% in likeability**.



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

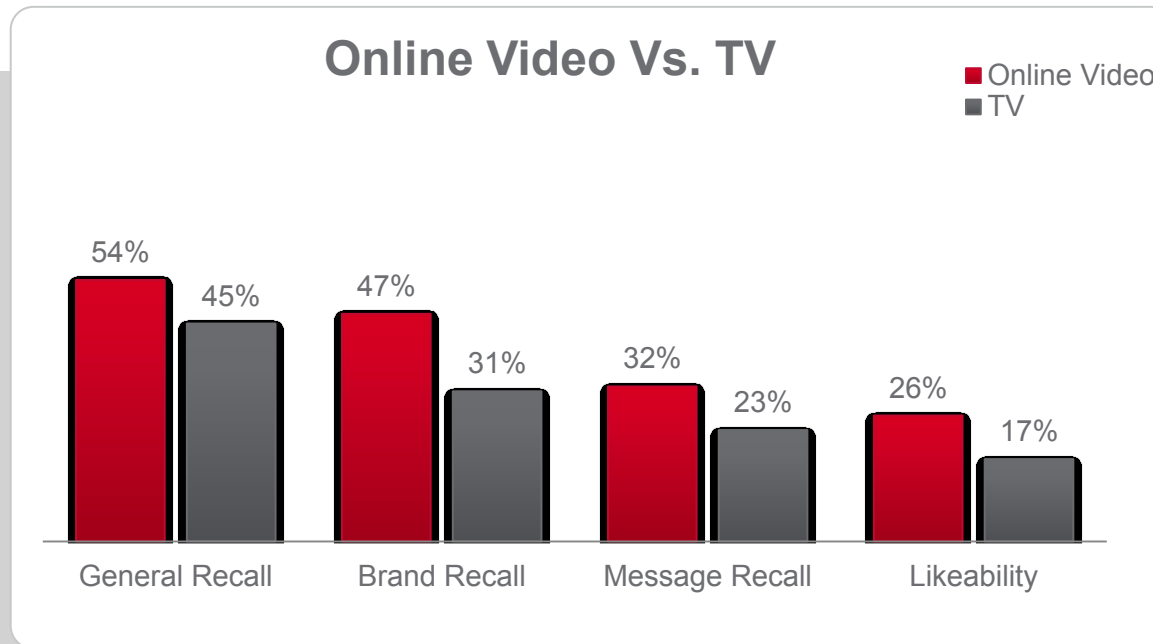
Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag





Prepared foods/ingredient online video ads outperform the TV ads on every metric

- 47% of those exposed to online video ads recalled the **prepared foods/ingredient brand** versus 31% for the TV ads, **+52% in brand performance**.
- 26% of those exposed to online video ads perceived the **prepared foods/ingredient ads as likeable** versus 17% for the TV ad, **+53% in likeability**.

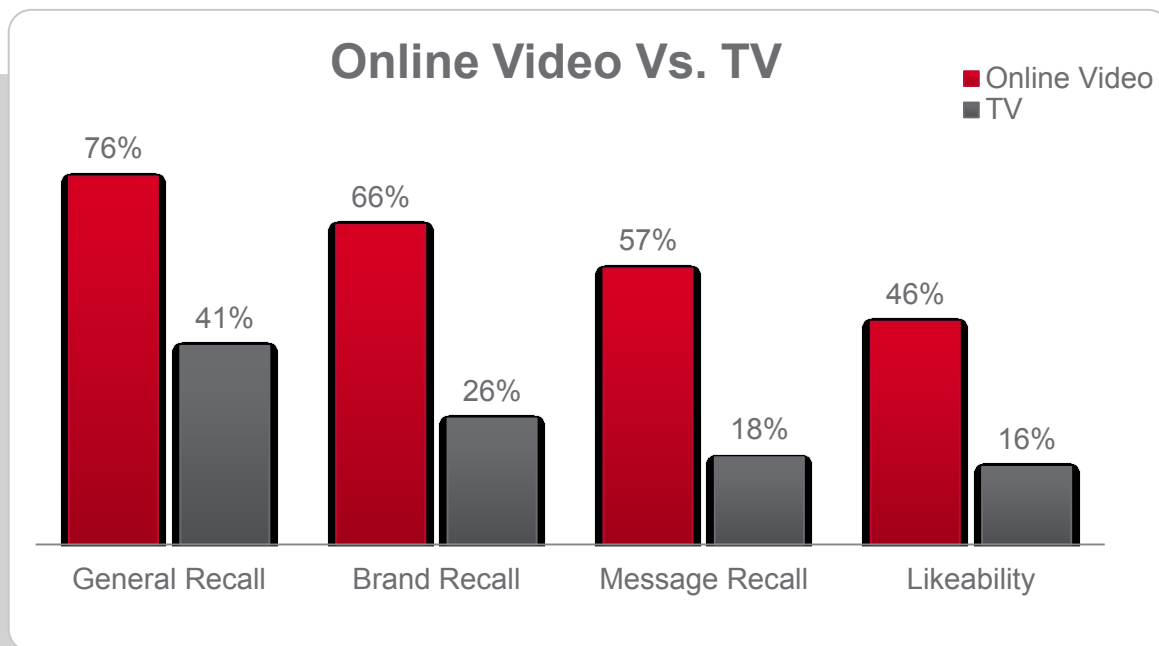


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Snack food online video ads outperform the snack food TV ads on every metric

- 57% of those exposed to online video ads recalled the **snack food message** versus 18% for the TV ad, **+217% in message performance**.
- 46% of those exposed to online video ads perceived the **snack food ads as likeable** versus 16% for the TV ad, **+188% in likeability**.

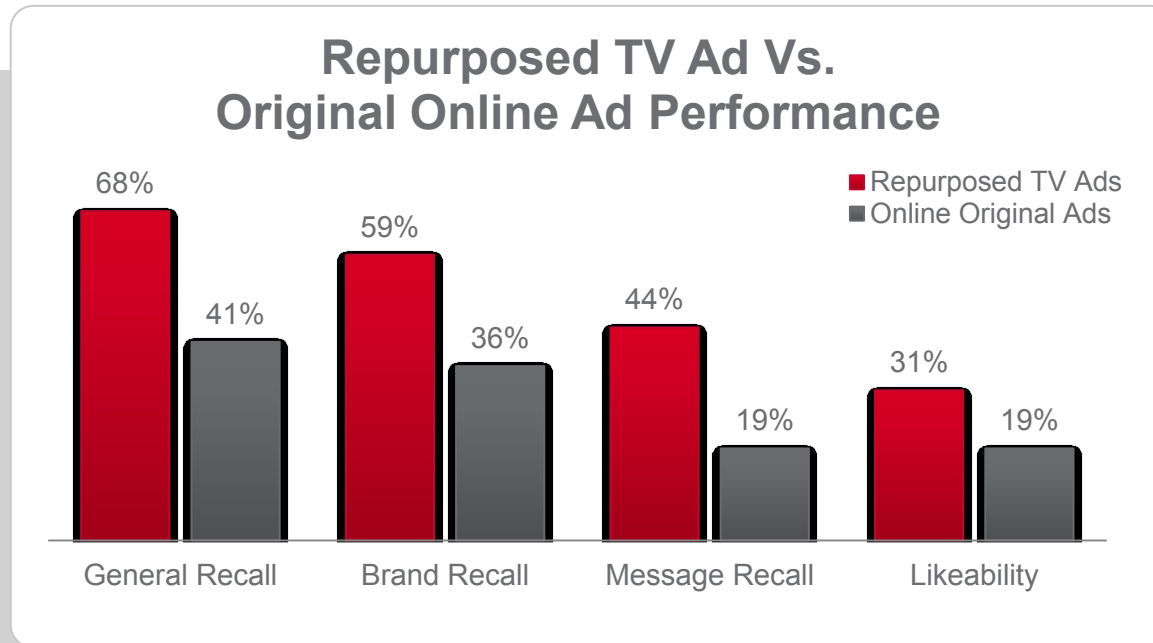


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Food repurposed TV ads are as effective as food online original ads

- 44% of those exposed to repurposed TV ads recalled the **food message** versus 19% for the online original ads, **+132% in message performance**.
- 31% of those exposed to repurposed TV ads perceived the **food ads as likeable** versus 19% for the online original ads, **+63% in likeability**.



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

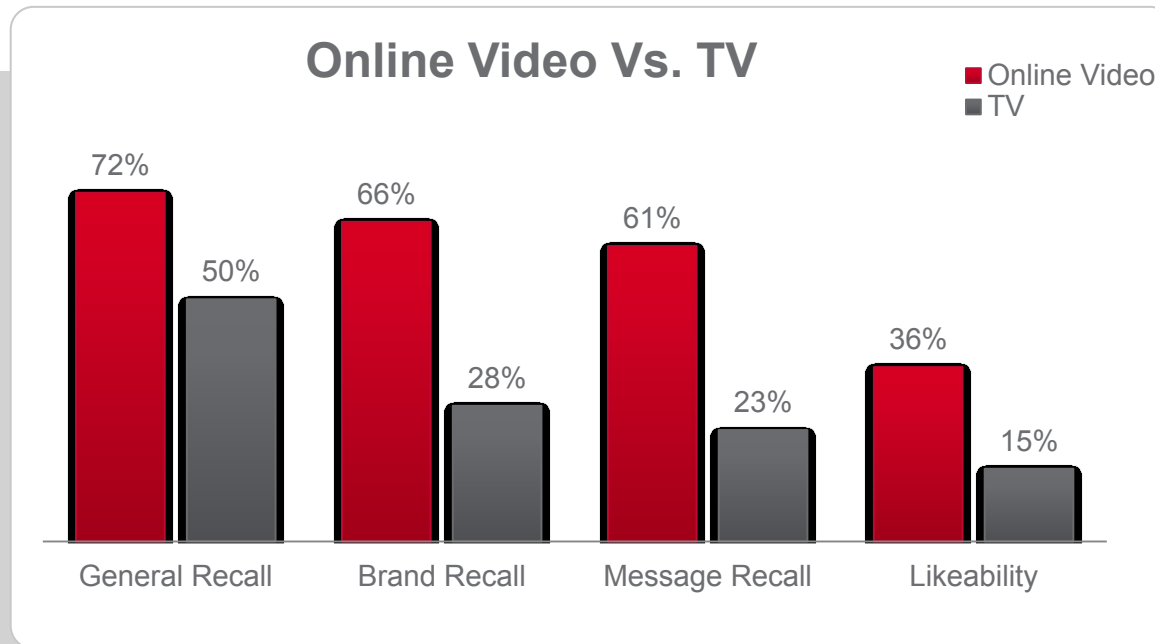
Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag

Electronics



Consumer electronics/computer online video ads outperform the TV ads on every metric

- 61% of those exposed to online video ads recalled the **consumer electronics/computer message** versus 23% for the TV ads, **+165% in message performance**.
- 36% of those exposed to online video ads perceived the **consumer electronics/computer ads as likeable** versus 15% for the TV ads, **+140% in likeability**.



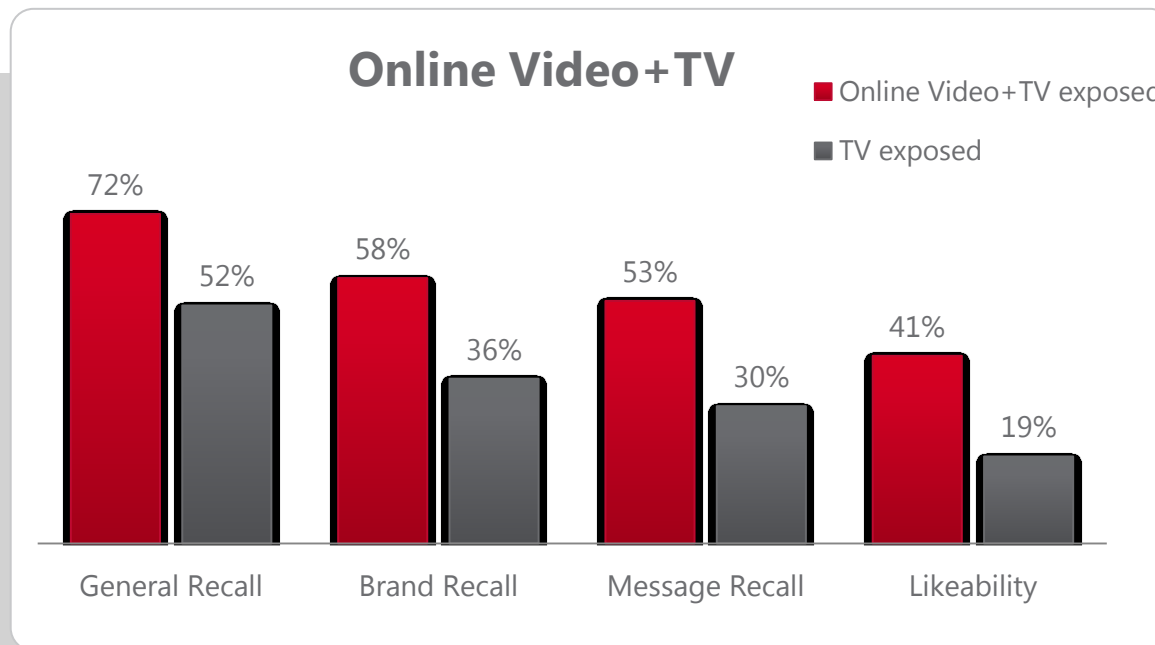
Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary





Consumer electronics/computer online video ads increase the efficacy of the TV spots

- 53% of those exposed to both online video and TV ads recalled the **consumer electronics/computer message** versus 30% for the TV ad alone, **+77% in message performance**.
- 41% of those exposed to both online video and TV ads perceived the **consumer electronics/computer ads as likeable** versus 19% for the TV ad alone, **+116% in likeability**.

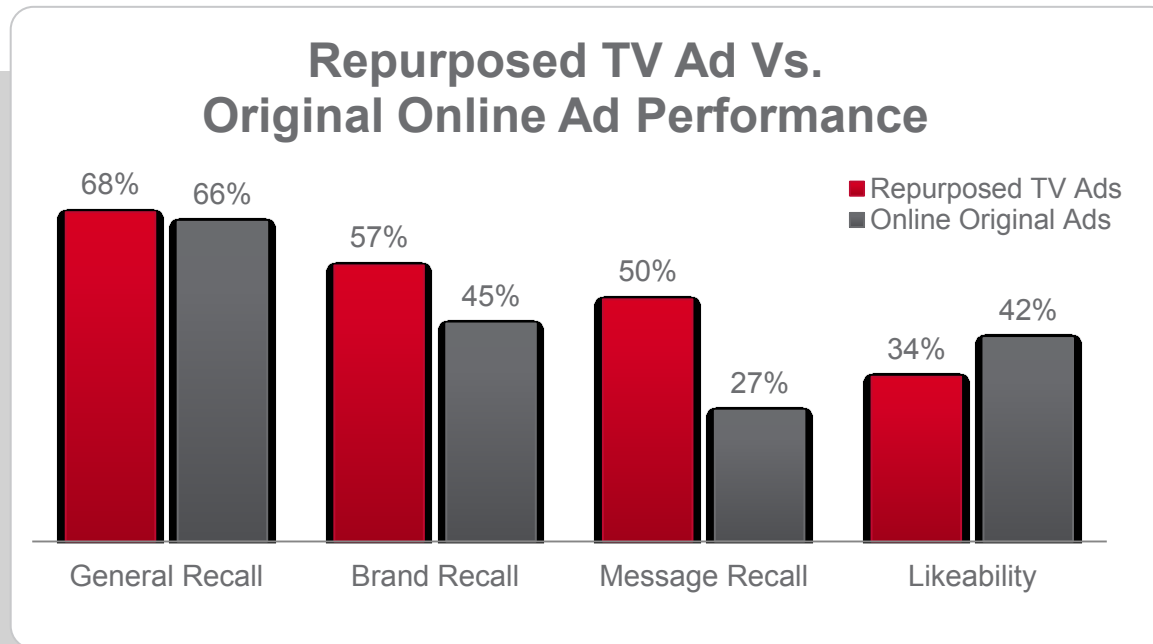


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product



Consumer electronics/computer repurposed TV ads are as effective as online original ads

- 50% of those exposed to repurposed TV ads recalled the **consumer electronics/computer message** versus 27% for the online original ads, **+85% in message performance**.
- 34% of those exposed to repurposed TV ads perceived the **consumer electronics/computer as likeable** versus 42% for the online original ads, **+24% in likeability for online original ads**.



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

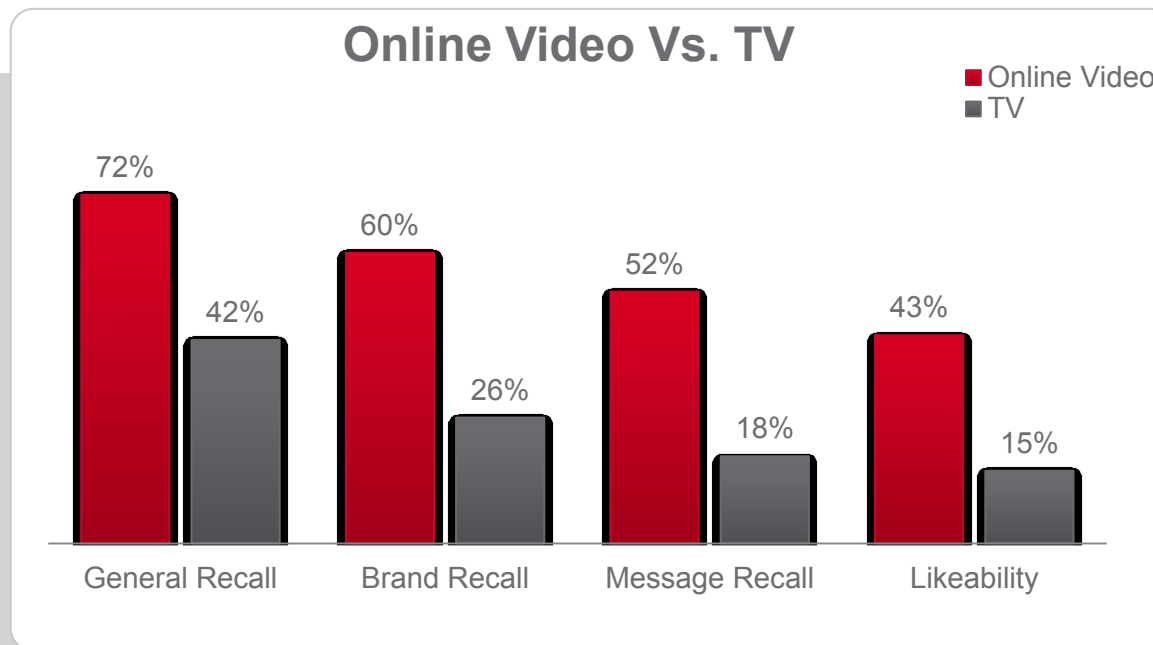
Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag





Video/computer game online video ads outperform the TV ads on every metric

- 52% of those exposed to online video ads recalled the **video/computer game message** versus 18% for the TV ads, **+189% in message performance**.
- 43% of those exposed to online video ads perceived the **video/computer game as likeable** versus 15% for the TV ads, **+187% in likeability**.



Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary

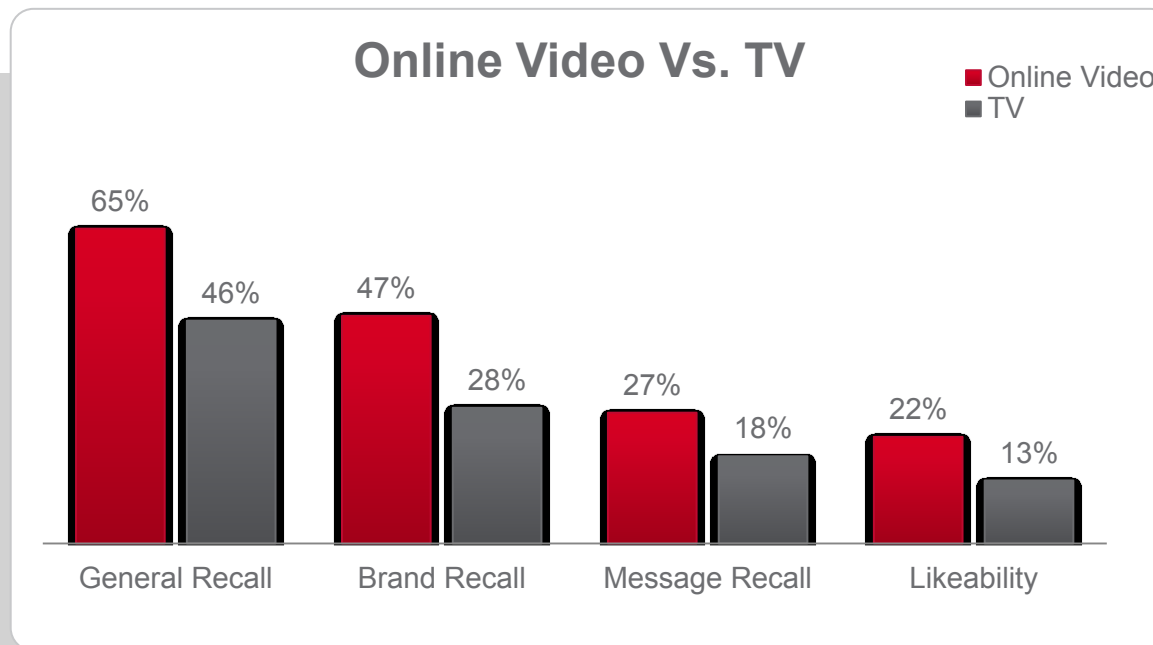


Financial services



Finance/insurance/real estate online video ads outperform the TV ads on every metric

- 47% of those exposed to online video ads recalled the **finance/insurance/real estate brand** versus 28% for the TV ads, **+68% in brand performance**.
- 22% of those exposed to online video ads perceived the **finance/insurance/real estate ads as likeable** versus 13% for the TV ads, **+69% in likeability**.

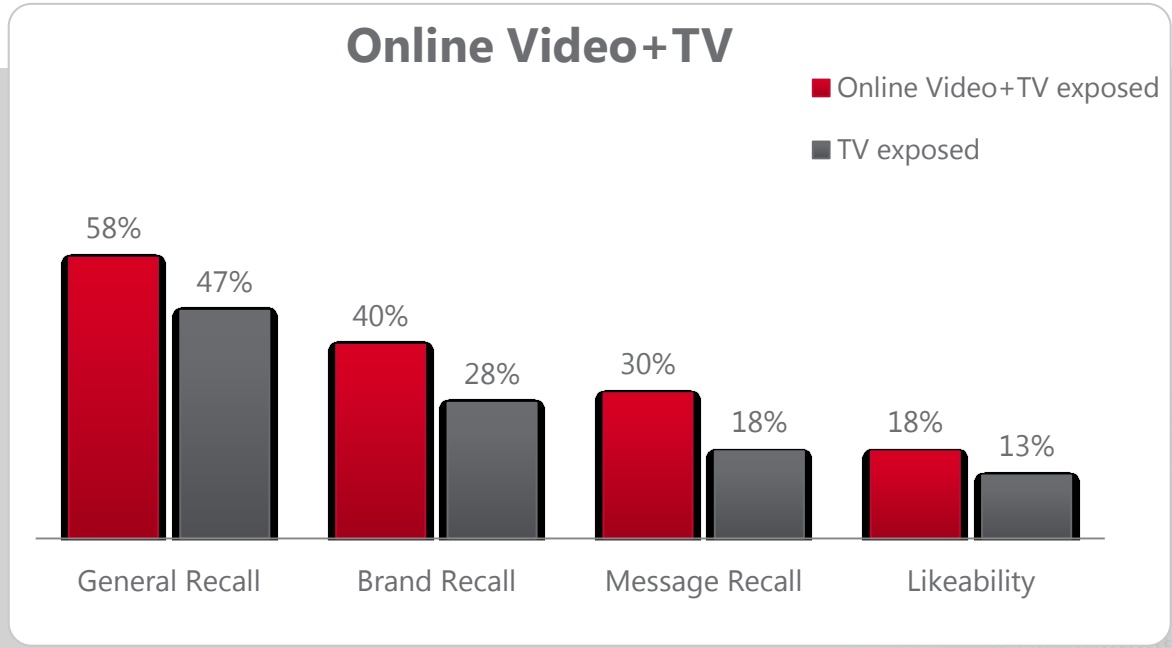


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Finance/insurance/real estate online video ads increase the efficacy of the TV spot

- 30% of those exposed to both online video ads and TV recalled the **finance/insurance/real estate message** versus 18% for the TV ad alone, **+67% in message performance**.
- 18% of those exposed to both online video ads and TV perceived the **finance/insurance/real estate ads as likeable** versus 13% for the TV ad alone, **+38% in likeability**.



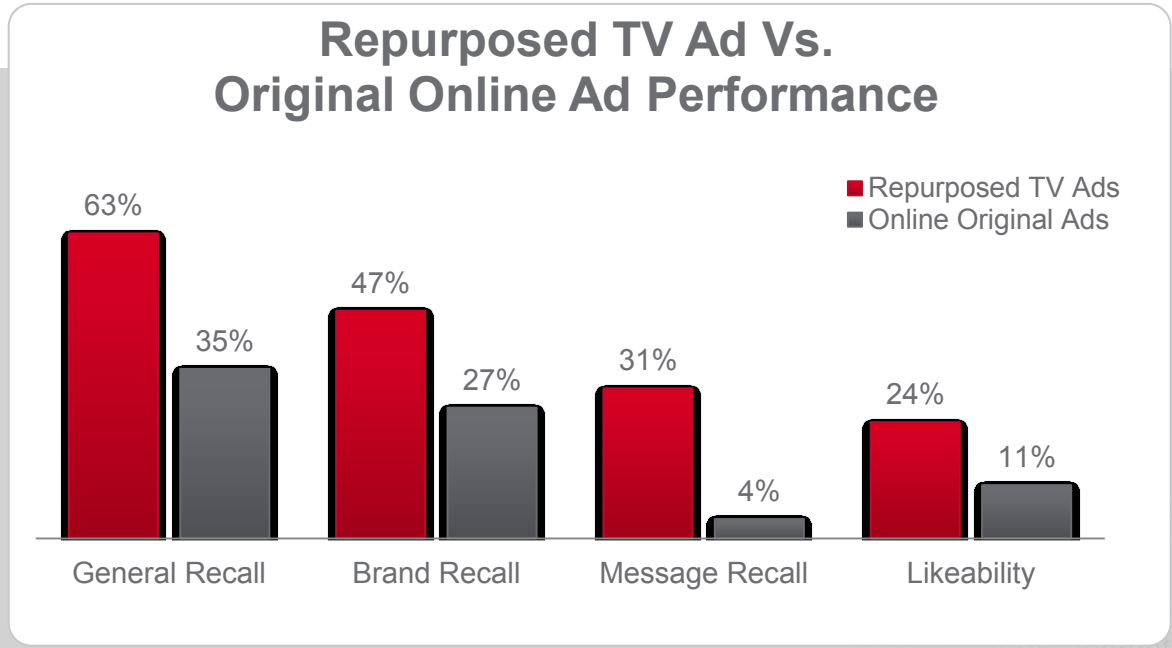
Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product





Finance/insurance/real estate repurposed TV ads are as effective as original online ads

- 31% of those exposed to repurposed TV ads recalled the **finance/insurance/real estate message** versus 4% for the online original ads, **+675% in message performance**.
- 24% of those exposed to repurposed TV ads perceived the **finance/insurance/real estate as likeable** versus 11% for the online original ads, **+118% in likeability**.



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.
Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag

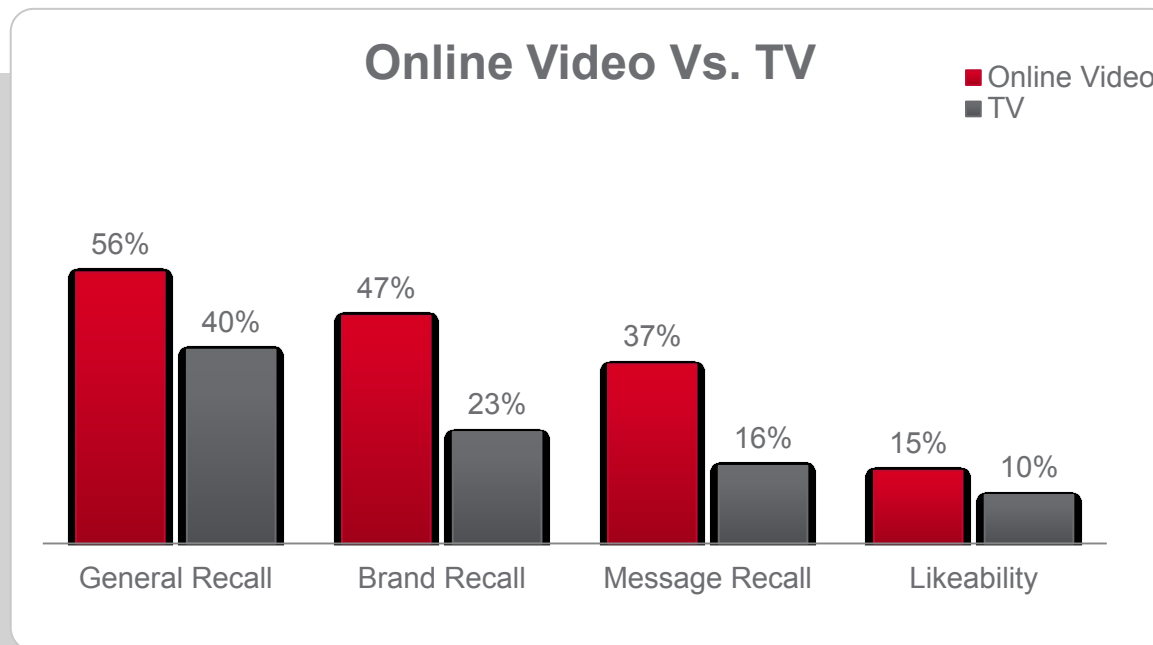


Healthcare



Healthcare online video ads outperform healthcare TV ads on every metric

- 37% of those exposed to online video ads recalled the **healthcare message** versus 16% for the TV ads, **+131% in message performance**.
- 15% of those exposed to online video ads perceived the **healthcare ads as likeable** versus 10% for the TV ads, **+50% in likeability**.

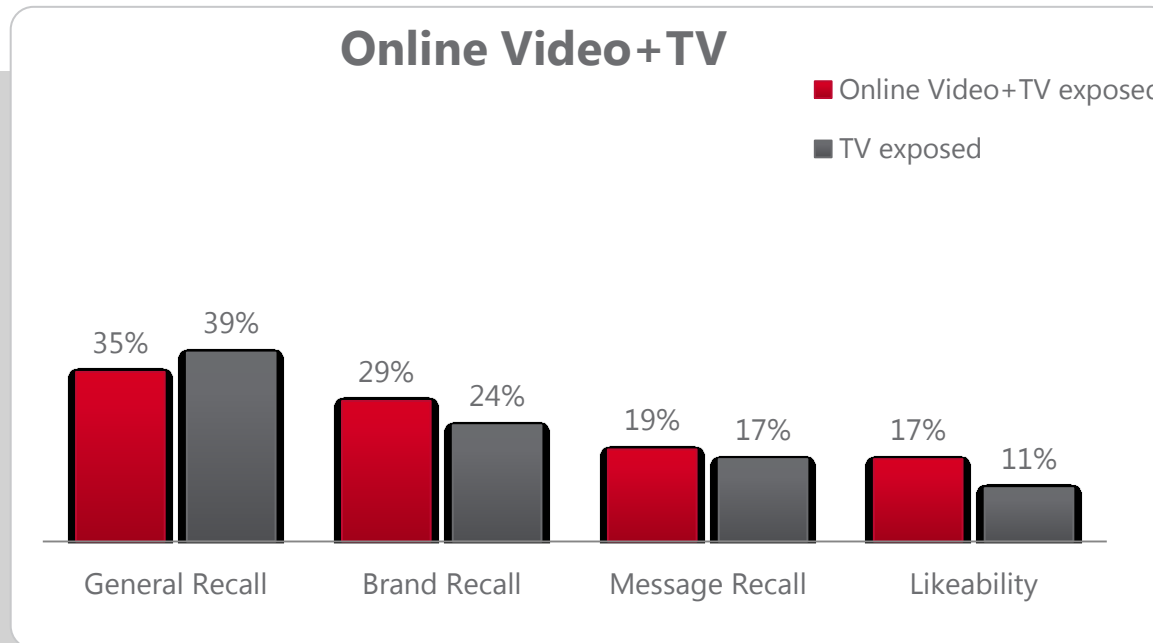


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Healthcare online video ads increase the efficacy of the healthcare TV spot

- 29% of those exposed to both online video ads and TV recalled the **healthcare brand** versus 24% for the TV ads alone, **+21% in brand performance**.
- 17% of those exposed to both online video ads and TV perceived the **healthcare ads as likeable** versus 11% for the TV ads alone, **+55% in likeability**.

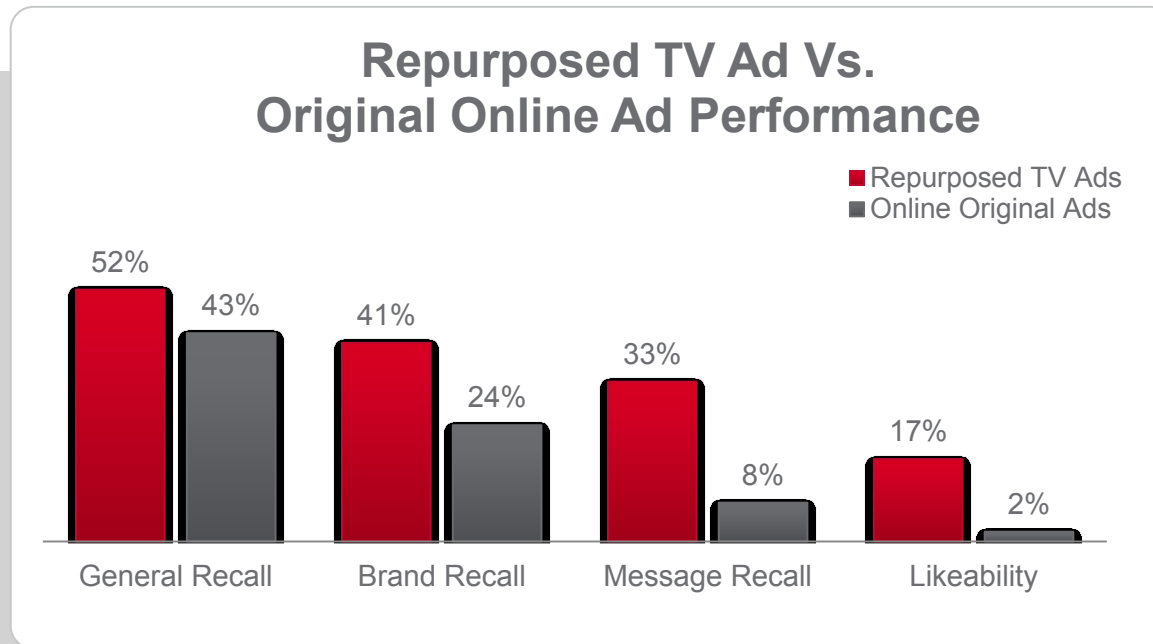


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product



Healthcare repurposed TV ads are as effective as healthcare online original ads

- 33% of those exposed to repurposed TV ads recalled the **healthcare message** versus 8% for the online original ads, **+313% in message performance**.
- 17% of those exposed to repurposed TV ads perceived the **healthcare ads as likeable** versus 2% for the online original ads, **+750% in likeability**.

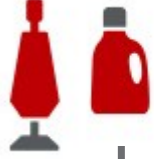


Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag

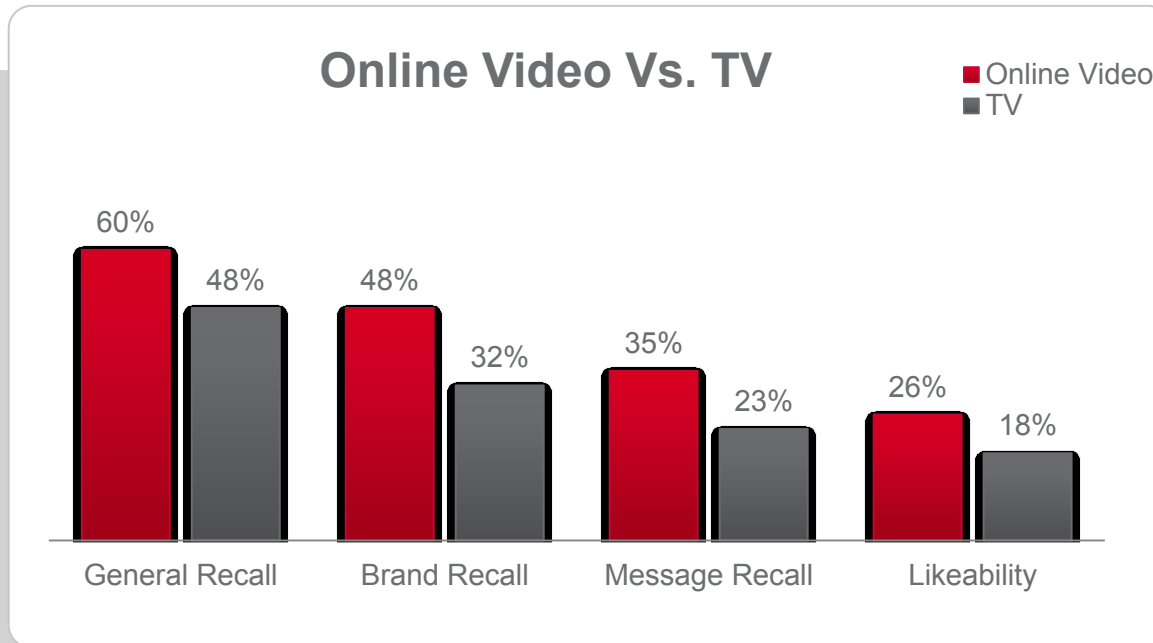


Household products



Household product online video ads outperform the TV ads on every metric

- 35% of those exposed to online video ads recalled the **Household product message** versus 23% for the TV ads, **+52% in message performance**.
- 26% of those exposed to online video ads perceived the **Household product ads as likeable** versus 18% for the TV ads, **+44% in likeability**.



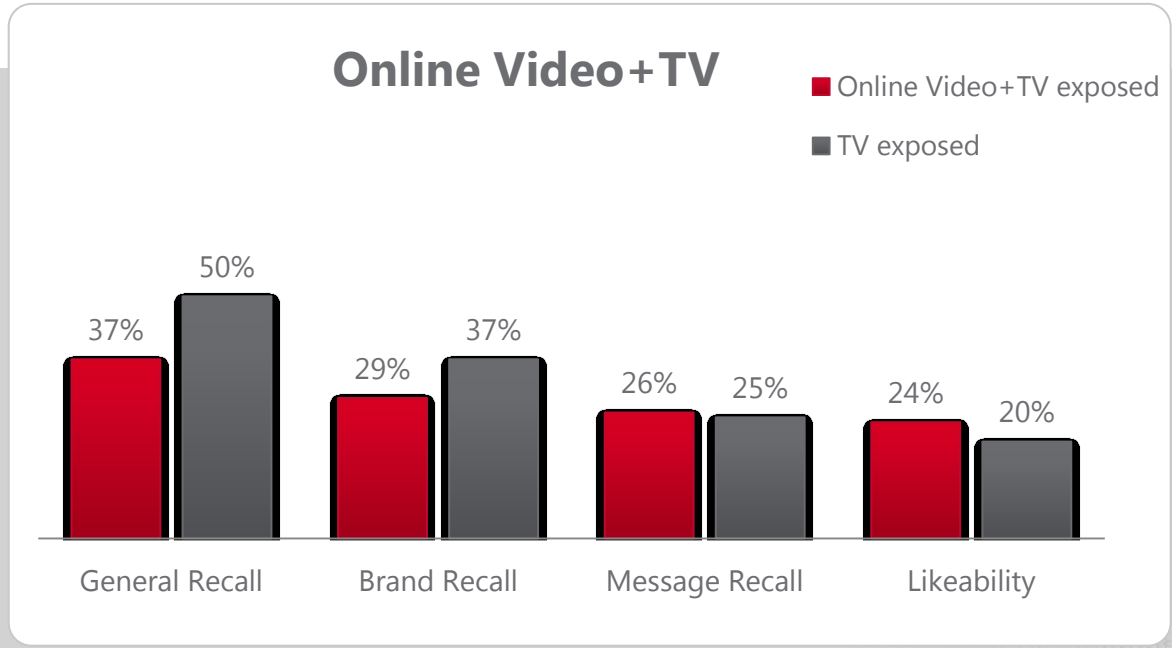
Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary





Household product online video ads increase the efficacy of household product TV spots

- 26% of those exposed to both online video ads and TV recalled the **household product message** versus 25% for the TV ad alone, **+4% in message performance**.
- 24% of those exposed to both online video ads and TV perceived the **household product ads as likeable** versus 20% for the TV ad alone, **+20% in likeability**.



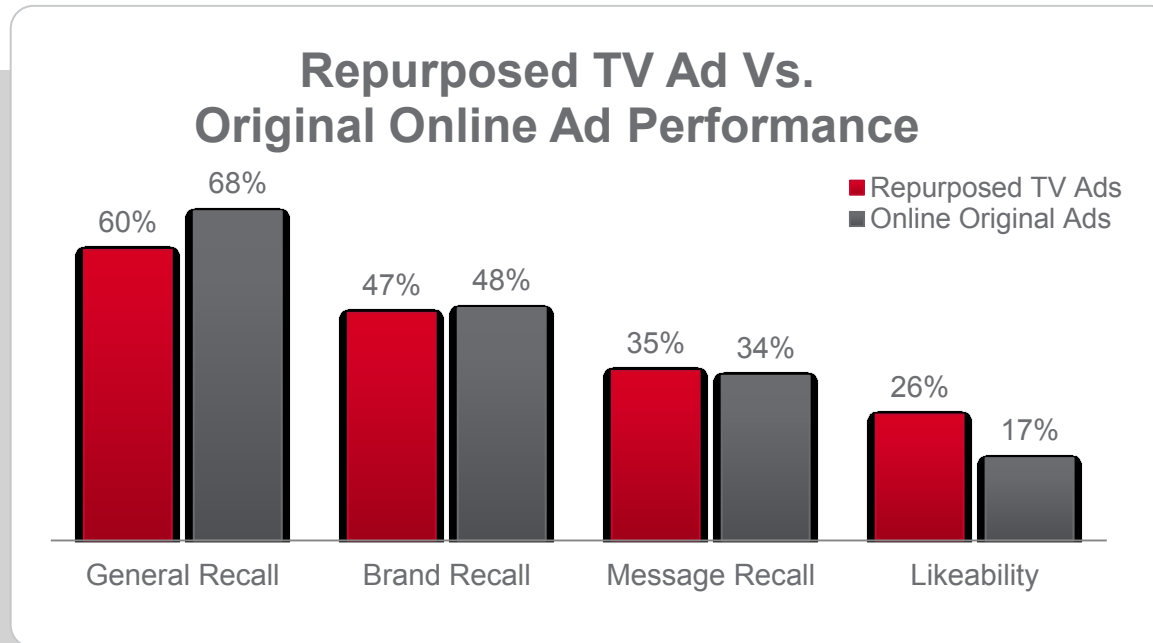
Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product





Household product repurposed TV ads are as effective as the online original ads

- 35% of those exposed to repurposed TV ads recalled the **household product message** versus 34% for the online original ads, **+3% in message performance**.
- 26% of those exposed to repurposed TV ads perceived the **household product ads as likeable** versus 17% for the online original ads, **+53% in likeability**.



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag

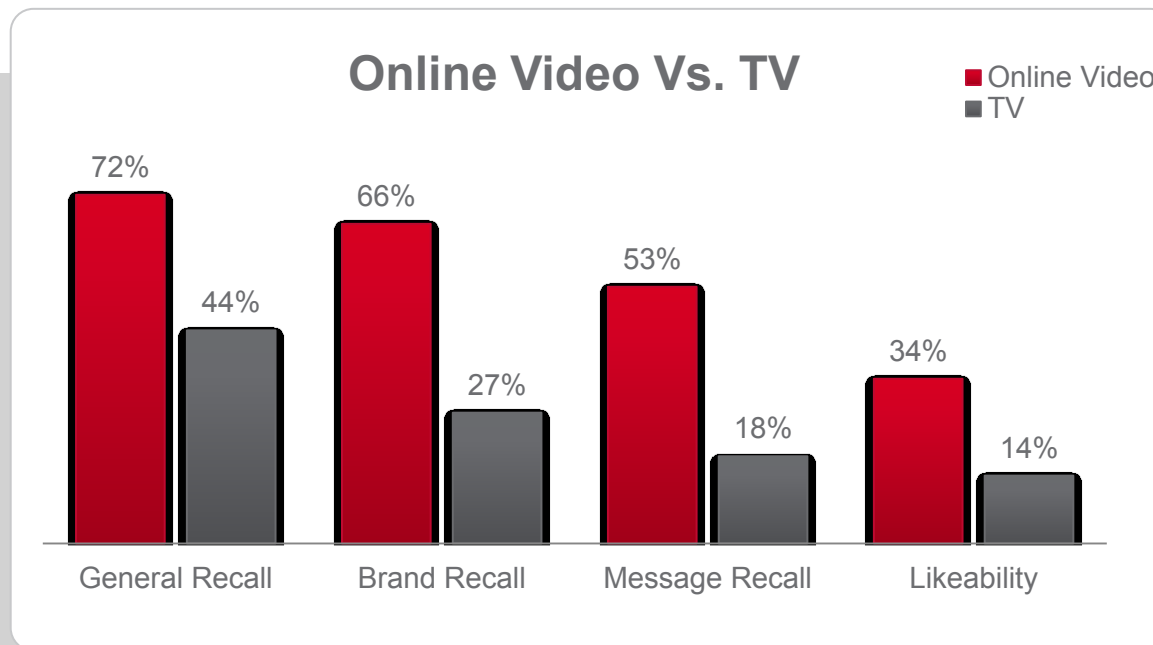


Personal care



Personal care online video ads outperform personal care TV ads on every metric

- 53% of those exposed to online video ads recalled the **personal care message** versus 18% for the TV ads, **+194% in message performance**.
- 34% of those exposed to online video ads perceived the **personal care ads as likeable** versus 14% for the TV ads, **+143% in likeability**.

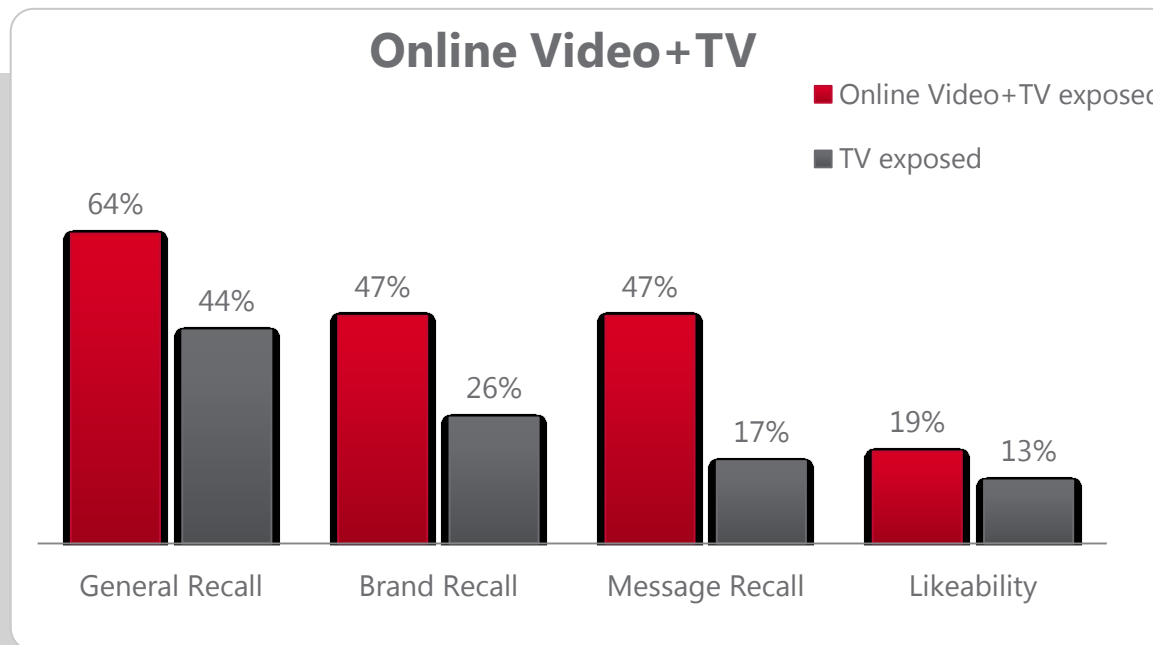


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Personal care online video ads increase the efficacy of the personal care TV spots

- 47% of those exposed to both online video ads and TV ads recalled the **personal care message** versus 17% for the TV ads alone, **+176% in message performance**.
- 19% of those exposed to both online video ads and TV ads perceived the **personal care ads as likeable** versus 13% for the TV ads alone, **+46% in likeability**.

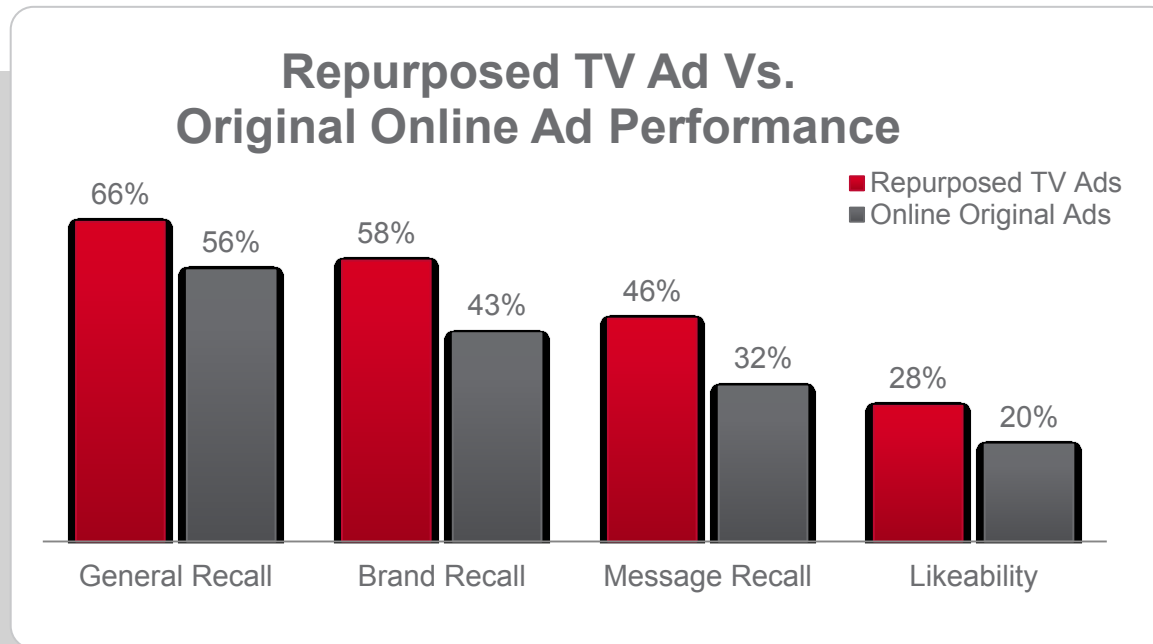


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product



Personal care repurposed TV ads are as effective as the online original ads

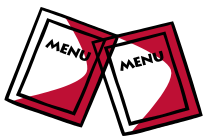
- 46% of those exposed to repurposed TV ads recalled the **personal care message** versus 32% for the online original ads, **+44% in message performance**.
- 28% of those exposed to repurposed TV ads perceived the **personal care ads as likeable** versus 20% for the online original ads, **+40% in likeability**.



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

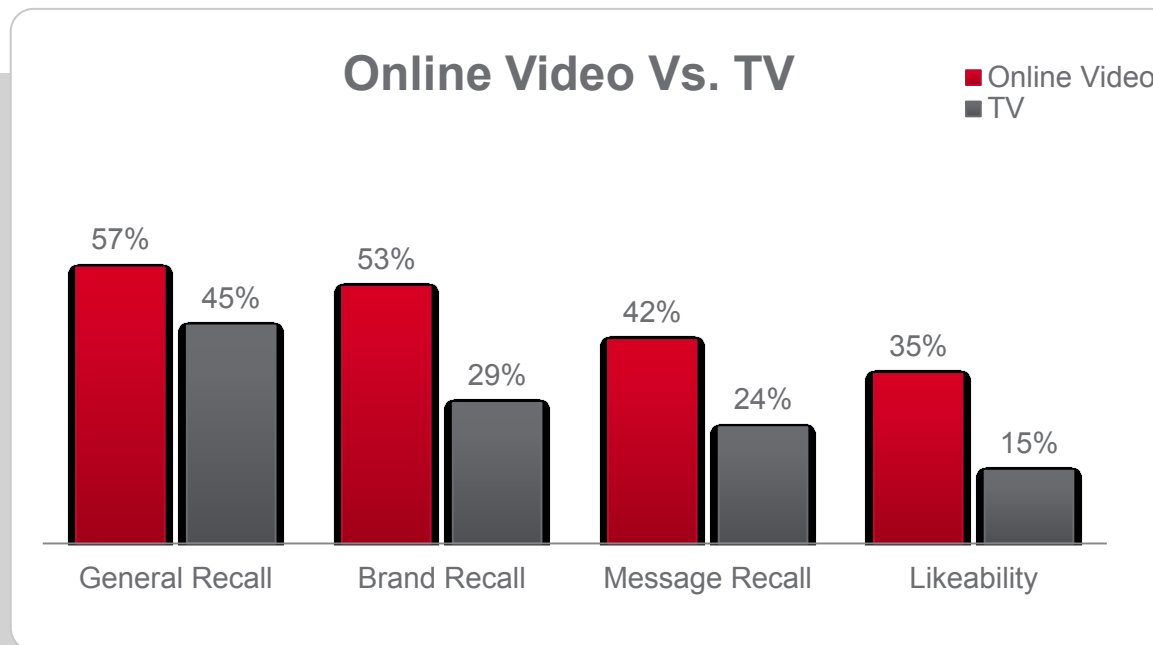
Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag

Restaurants

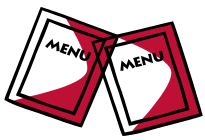


Restaurant online video ads outperform restaurant TV ads on every metric

- 53% of those exposed to online video ads recalled the **restaurant brand** versus 29% for the TV ads, **+83% in brand performance**.
- 35% of those exposed to online video ads perceived the **restaurant ads as likeable** versus 15% for the TV ads, **+133% in likeability**.

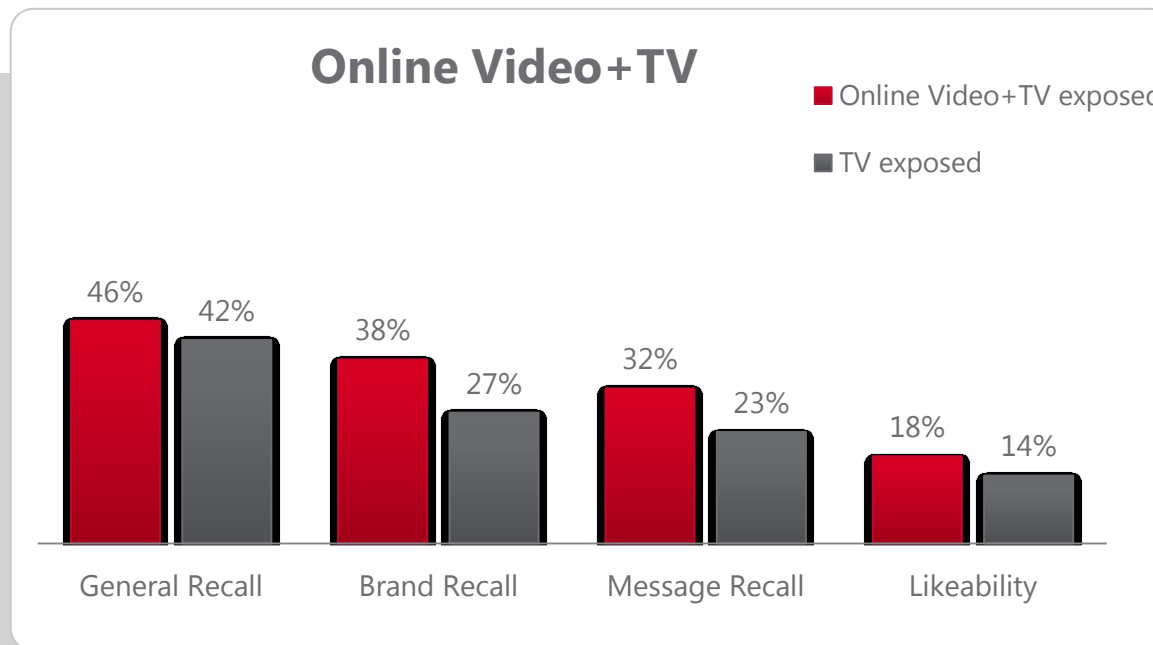


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Restaurant online video ads increase the efficacy of restaurant TV spots

- 32% of those exposed to both online video ads and TV ads recalled the **restaurant message** versus 17% for the TV ads alone, **+176% in message performance**.
- 18% of those exposed to both online video ads and TV ads perceived the **restaurant ads as likeable** versus 14% for the TV ads alone, **+29% in likeability**.



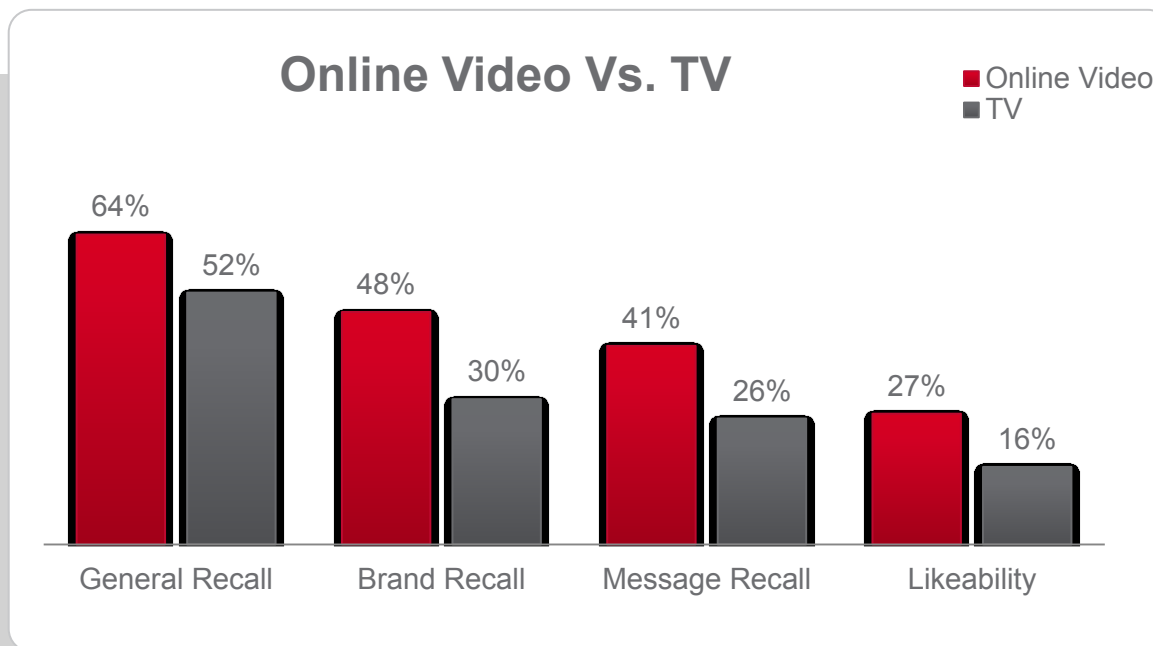
Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product

Telecom



Telecom online video ads outperform telecom TV ads on every metric

- 41% of those exposed to online video ads recalled the **telecom message** versus 26% for the TV ads, **+58% in message performance**.
- 27% of those exposed to online video ads perceived the **telecom ads as likeable** versus 16% for the TV ads, **+69% in likeability**.

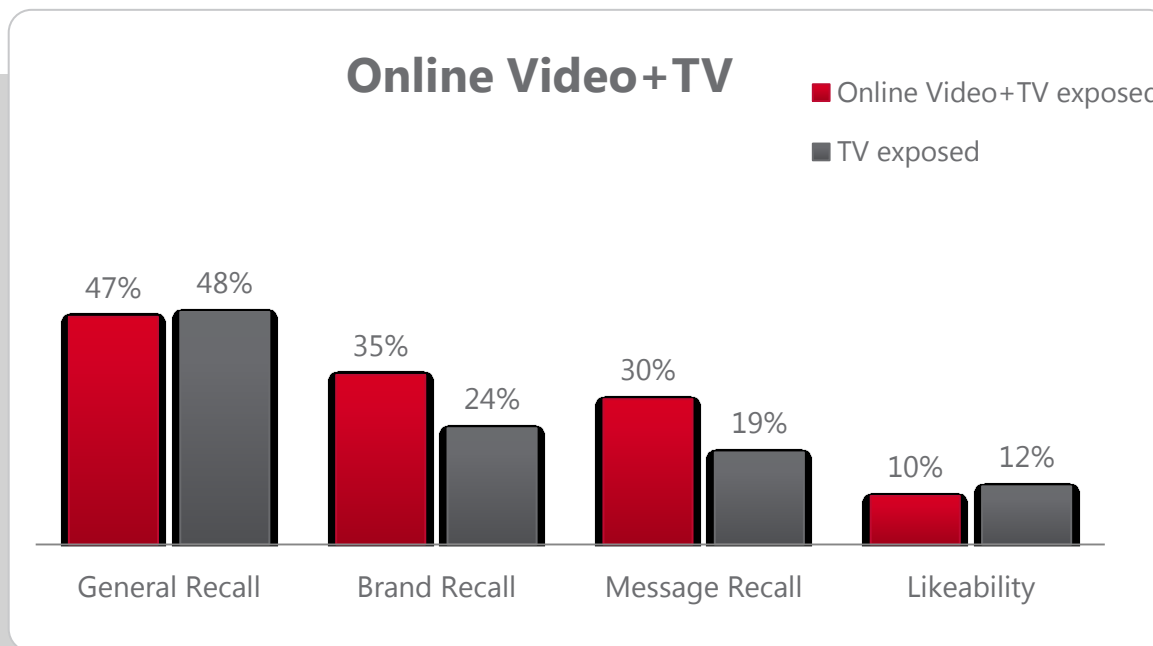


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09, Includes individuals only exposed to brand/product on one platform (in prior 15 days). Television norms inclusive of Primetime programming only and based on survey responses during same time period as Premium Online Video survey responses. Note: TV norms above are based on all ads for those Brand/Products which ran on both Premium Online Video & TV during time period; specific creative executions may vary



Telecom online video ads increase the efficacy of telecom TV spots

- 35% of those exposed to both online video ads recalled the **telecom brand** versus 24% for the TV ads, **+46% in brand performance**.
- 30% of those exposed to both online video ads recalled the **telecom message** versus 19% for the TV ads, **+58% in message performance**.

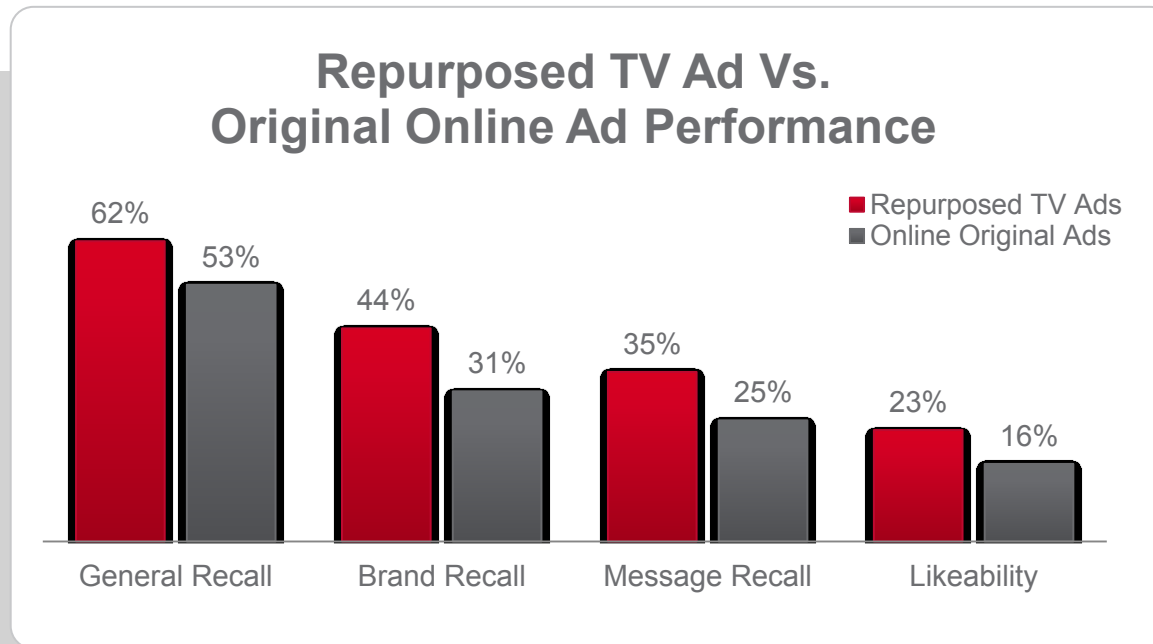


Source: Nielsen IAG, A18-49, Premium Online Video Measurement 2008-09. TV + Premium Online Video exposure group include those viewers who were exposed to same brand/product ad in Premium Online Video in 7-day period prior to TV ad exposure. Primetime TV data based only time period(s) where impressions were also being delivered on measured Premium Online Video for same brand/product



Telecom repurposed TV ads are as effective as telecom online original ads

- 35% of those exposed to online video ads and TV ads recalled the **telecom message** versus 25% for the TV ads alone, **+40% in message performance**.
- 23% of those exposed to online video ads and TV ads perceived the **telecom ads as likeable** versus 16% for the TV ads alone, **+44% in likeability**.



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.

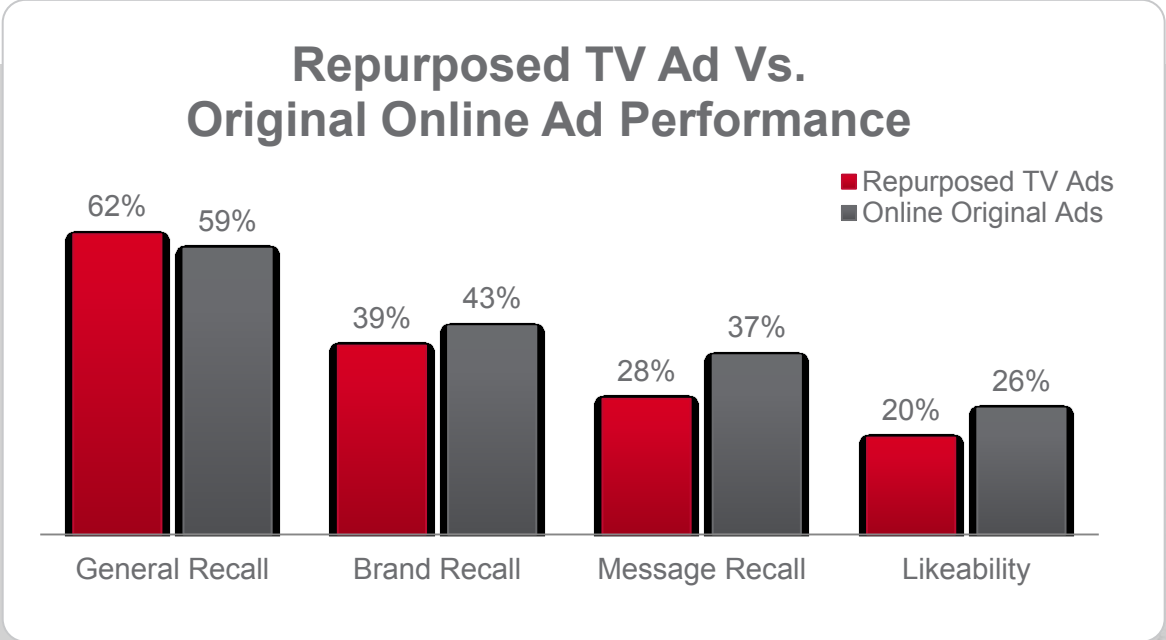
Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag

Travel



Travel and hospitality repurposed TV ads are as effective as the online original ads

- 28% of those exposed to online video ads recalled the **travel/hospitality message** versus 37% for the TV ads, **+32% in brand performance for online original ads.**
- 20% of those exposed to online video ads perceived the **travel/hospitality ads as likeable** versus 26% for the TV ads, **+30% in likeability for online original ads.**



Source: Nielsen IAG, P13+, Premium Online Video Measurement 2007-09.
Note: Only categories with sufficient sample size and cases (at least 3 unique creatives for each ad type) shown above. Web Original ads include those Online ads for which Nielsen IAG has not logged a counterpart ad on Standard Television. Counterpart must contain same core creative, but may not necessarily be of the same length or include identical tag



Appendix

Ad surveys for online video and television are identical allowing direct comparison of platforms

Honda Civic: Music (:15)

General Recall	Brand Recall	Message Recall	Likeability
<p>In an advertisement during this show, what happened that caused people to clap and cheer as a silver car sped along a desert highway?</p> <ul style="list-style-type: none">• Grooves in asphalt sounded out a musical composition when driven over• Nails in the ground held balloons that inflated when they were passed• Miniature cones on short medians fell in a domino effect when clipped• Colored lights on fence poles made a light show signaling traffic was clear	<p>What was this an advertisement for?</p> <ul style="list-style-type: none">• Honda Civic• Nissan Sentra• Ford Focus• Toyota Corolla	<p>According to this advertisement, why should you purchase a Honda Civic?</p> <ul style="list-style-type: none">• Gets great gas mileage• Seats five comfortably• Has a powerful engine	<p>How much did you like this advertisement?</p> <ul style="list-style-type: none">• I liked it a lot• I liked it somewhat• I am neutral about this advertisement• I disliked it somewhat• I disliked it a lot

Note: Responses randomized for General, Brand and Message Recall questions; Brand Recall only asked of General Recallers; Message Recall and Likeability only asked of Brand Recallers