



BEVERAGE ALCOHOL MEDIA REPORT

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™



WELCOME

DANNY BRAGER
SVP PROFESSIONAL
SERVICES
BEV-AL PRACTICE
NIELSEN

It's our pleasure to provide for our Beverage Alcohol (Bev Al) clients a compilation of Nielsen measurements of Legal Drinking Age (LDA) consumers and perspectives on the media landscape. U.S. consumers have significant choice in 'connecting' with their favorite content, often with multiple viewing and listening options at their fingertips. This is in turn challenging companies to adapt to the acceleration of change and continued fragmentation of consumers' media time and attention. While U.S. consumers are adding time to their media day to connect with their favorite content, no matter where it exists, they are also progressively shifting from live viewing to digital and on-demand consumption.

In this report, we have provided three different perspectives:

- Digital Best Practices – secrets to success with digital from one of the best at it – Anheuser-Busch InBev.
- LDA Audience Media Consumption – a perspective on how LDA consumers are consuming media content. Within this section, we explore how consumers are connecting with devices and platforms and for how long they are doing so, with 21+ breakdowns by age and ethnicity. Consumers simply choose to consume the content that best meets their needs, but the measurement side of that is not so simple. This is something Nielsen is addressing via total audience measurement.
- The “Best of the Best” – the top Bev Al television ads from the first two quarters of 2015 for each Adult Beverage category, as ranked by how well the ads broke through in-market and connected back to the brand.

I hope you enjoy the highlights from across Nielsen's wealth of measurements and insights. We will continue to enable a true understanding of total audience behavior within an ever-fragmenting media world.

DANNY

FROM GOOD TO GREAT: GETTING THE MOST FROM YOUR DIGITAL MEDIA SPEND

Live TV viewing still makes up almost half of media consumption time. The average 21+ adult spends more than four hours a day—or about 30 hours a week—watching live TV. So TV is still a very important media channel.

However, Live TV viewership has been experiencing declines as the media landscape continues to shift. This is due to the proliferation of devices and growing opportunities for content discovery made possible by over-the-top services and digital platforms (see Exhibit 1 – Average Time Spent Per Adult 21+ per Day).

To help offset declines in audiences for traditional media, marketers today are allocating budget to digital advertising to ensure they are reaching audiences across platforms. But effective digital media execution requires stringent and disciplined performance management in order to get the most from such spending.

Nielsen's marketing mix database shows that there is a large range of possible digital ROI outcomes. What is clear is that top performing digital campaigns are very powerful in their effects.

“THE SECRETS TO SUCCESS WITH DIGITAL MEDIA ARE: LEVERAGING DATA TO HELP OBJECTIVELY ALLOCATE MEDIA, MANAGING THE DIGITAL MEDIA EXECUTION, ADOPTING CREATIVE BEST PRACTICES, TRACKING THE RESULTS, AND THEN DOING IT ALL OVER AGAIN”

**KATHY FRENCH
SENIOR VICE-PRESIDENT
ADVERTISER SOLUTIONS, NIELSEN**

IMPLEMENTING DIGITAL: THE ANHEUSER-BUSCH INBEV WAY

As noted above the media landscape is more fragmented than ever before; so how do companies, such as global brewer Anheuser-Busch InBev (ABI), make sure their creative efforts are noticed? They go where the beer drinkers (or their desired consumers) are—and across industries, that increasingly means going digital.

In order to reach their target consumers, ABI has successfully implemented a digital strategy by adopting a series of performance management processes, including:

- Ensuring they are reaching as many of the right people as possible
- Monitoring and optimizing viewability
- Ensuring strong creative quality
- Allocating media spending across channels and across brands appropriately

This has resulted in the company achieving twice the digital ROI of its peers and of the consumer packaged goods (CPG) industry average.

“THERE’S NO MAGIC HERE—IT JUST TAKES GOOD DATA, DISCIPLINE AND PROCESS.”

HARRY LEWIS
SENIOR DIRECTOR
CONSUMER CONNECTIONS, ANHEUSER-BUSCH INBEV

REAL-WORLD LESSONS FROM ANHEUSER-BUSCH INBEV

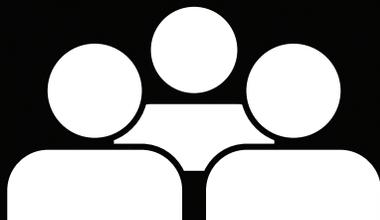
Developing a clear performance management strategy is essential to successful digital advertising campaigns. ABI focuses on translating data-fueled insights into effective marketing and media execution that leads to strong media ROIs.

ABI believes that to win in beer, it needs to win with millennials. Millennials aged 21-27 are the next generation of beer drinkers: they represent 36% of the industry growth, a number expected to increase by 25% in the next five years. Millennials are also the most digitally-savvy generation the world has ever seen.

To market effectively to millennials, ABI has created a measurement framework that allows the company to optimize both its digital creative content and its digital media execution – ensuring that Millennials are viewing the content created for them. ABI's measurement framework includes the following:

- Leveraging pre-testing for online video
- Rigorously tracking unique audiences to ensure that its ads are reaching as many of the right consumers as possible
 - o Delivery: Ensuring in-demo delivery and % Reach
 - o 21+: placements not reaching under 21
 - o Frequency: tracking and managing frequency of exposures
- Fielding digital ad resonance services to assess the impact of advertising on brand perceptions
- Diligently using marketing mix insights to determine how to allocate media dollars within a channel (e.g., sports programming vs. entertainment programming), across channels (e.g., digital vs. TV), and across brands

As a result of these steps, ABI has achieved ROIs that, at twice the CPG average, are the envy of the industry!



LDA
AUDIENCE
MEDIA
CONSUMPTION



AVERAGE TIME SPENT PER ADULT 21+ PER DAY

EXHIBIT 1 - BASED ON THE TOTAL US POPULATION

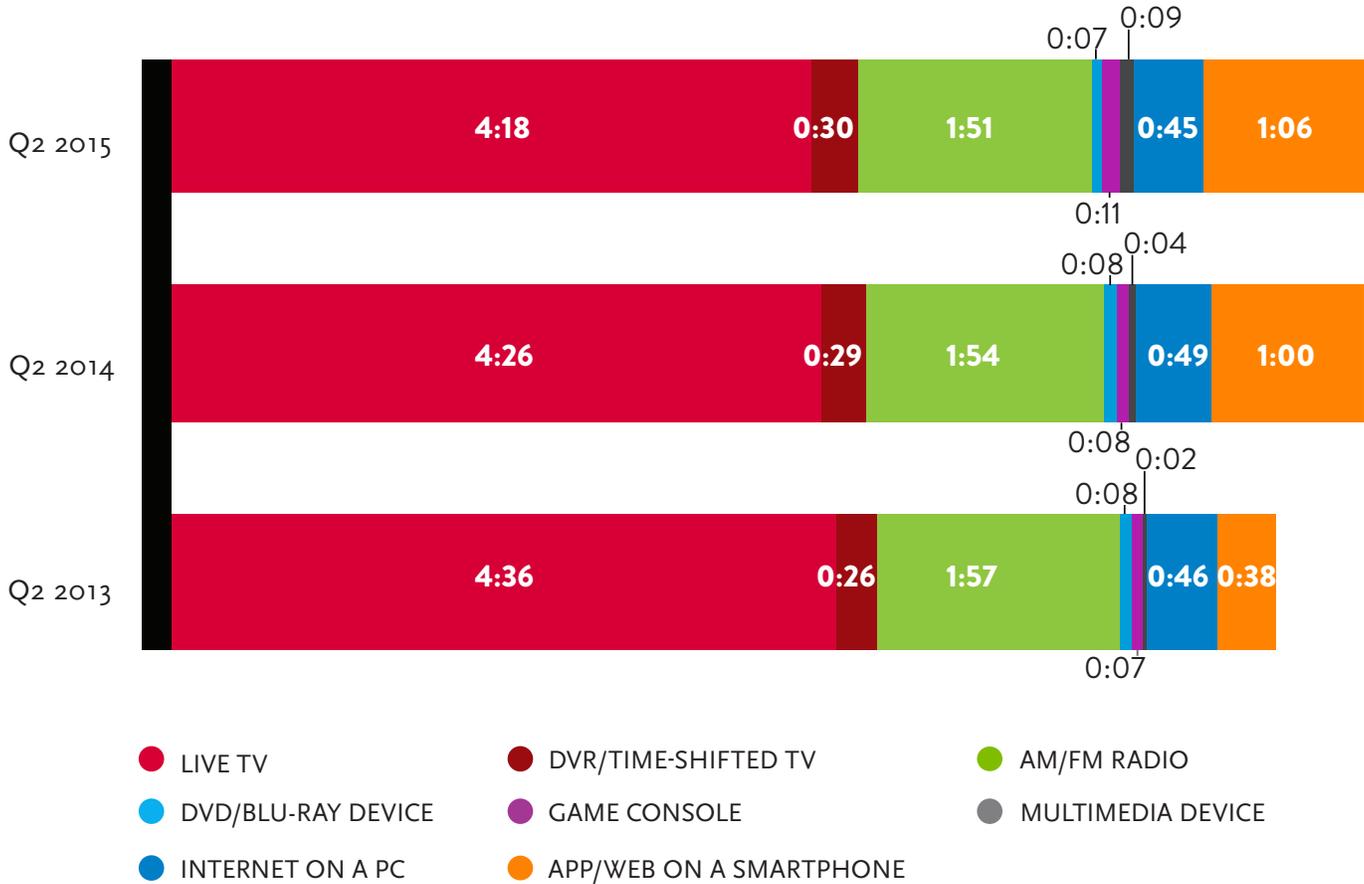


EXHIBIT 2 - BASED ON USERS OF EACH MEDIUM

| | Q2 2013 | Q2 2014 | Q2 2015 |
|-------------------------|---------|---------|---------|
| Live TV | 4:53 | 4:43 | 4:36 |
| DVR/Time-shifted TV | 0:47 | 0:51 | 0:50 |
| AM/FM Radio | 2:49 | 2:46 | 2:43 |
| DVD/Blu-Ray Device | 0:19 | 0:19 | 0:18 |
| Game Console | 0:32 | 0:38 | 0:46 |
| Multimedia Device | 0:36 | 0:42 | 0:47 |
| Internet on a PC | 1:01 | 1:07 | 1:04 |
| App/Web on a Smartphone | 1:04 | 1:25 | 1:30 |

The data sources in Exhibit 2 should not be added or subtracted; they are based on users of each medium and the bases vary by source.

TABLE 1A – A WEEK IN THE LIFE FOR Q2 2015

WEEKLY TIME SPENT IN HOURS:MINUTES BY AGE FOR US POPULATION

| | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ | BLACK 21+ | HISP. 21+ | ASIAN AM. 21+ |
|----------------------------|------------|------------|------------|------------|----------|----------|--------------|--------------|---------------------|
| Live + DVR/Time-shifted TV | 20:41 | 22:09 | 29:17 | 39:55 | 48:02 | 33:43 | 48:56 | 27:45 | 17:44 |
| DVR/Time-shifted TV | 2:33 | 2:58 | 3:53 | 4:07 | 3:40 | 3:33 | 3:11 | 2:23 | 2:10 |
| AM/FM Radio | 11:02 | 11:20 | 13:27 | 14:51 | 11:58 | 12:54 | 13:25 | 13:23 | n/a |
| DVD/Blu-Ray Device | 0:56 | 0:59 | 0:59 | 0:57 | 0:37 | 0:53 | 1:04 | 0:51 | 0:39 |
| Game Console | 3:20 | 2:54 | 1:10 | 0:22 | 0:07 | 1:18 | 1:38 | 1:23 | 0:56 |
| Multimedia Device | 1:41 | 1:45 | 1:13 | 0:43 | 0:29 | 1:03 | 0:45 | 0:54 | 2:22 |
| Internet on a PC | 5:30 | 5:49 | 6:13 | 5:41 | 3:01 | 5:15 | 6:03 | 3:51 | 4:04 |
| Video on a PC | 2:06 | 2:08 | 1:50 | 1:20 | 0:31 | 1:30 | 2:05 | 1:14 | 1:12 |
| App/Web on a Smartphone | 11:10 | 10:07 | 9:43 | 7:12 | 1:35 | 7:47 | 8:49 | 9:53 | 7:12 |
| Video on a Smartphone | 0:29 | 0:24 | 0:16 | 0:09 | IFR | 0:01 | 0:23 | 0:29 | 0:20 |

Note: IFR represents data that is insufficient for reporting due to small sample sizes. n/a represents data unavailability.

TABLE 1B - A WEEK IN THE LIFE FOR Q2 2014

WEEKLY TIME SPENT IN HOURS:MINUTES BY AGE FOR US POPULATION

| | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ | BLACK 21+ | HISP. 21+ | ASIAN AM. 21+ |
|----------------------------|------------|------------|------------|------------|----------|----------|--------------|--------------|---------------------|
| Live + DVR/Time-shifted TV | 23:06 | 24:24 | 30:17 | 40:22 | 47:27 | 34:32 | 50:53 | 28:51 | 18:30 |
| DVR/Time-shifted TV | 2:46 | 3:11 | 3:45 | 3:55 | 3:14 | 3:27 | 3:08 | 2:17 | 2:03 |
| AM/FM Radio | 11:30 | 11:43 | 13:59 | 15:00 | 12:10 | 13:15 | 13:58 | 13:43 | N/A |
| DVD/Blu-Ray Device | 1:12 | 1:20 | 1:05 | 0:58 | 0:36 | 0:59 | 1:17 | 0:53 | 0:41 |
| Game Console | 2:36 | 2:21 | 0:58 | 0:19 | 0:06 | 1:03 | 1:14 | 1:02 | 0:40 |
| Multimedia Device | 0:51 | 0:53 | 0:39 | 0:22 | 0:16 | 0:33 | 0:22 | 0:24 | 1:33 |
| Internet on a PC | 6:10 | 6:25 | 7:46 | 5:37 | 2:50 | 5:46 | 6:30 | 4:25 | 5:29 |
| Video on a PC | 2:06 | 2:02 | 1:49 | 1:06 | 0:21 | 1:24 | 1:54 | 1:17 | 1:38 |
| App/Web on a Smartphone | 9:58 | 9:40 | 8:29 | 5:11 | 1:13 | 7:02 | 8:01 | 9:07 | 6:37 |
| Video on a Smartphone | 0:22 | 0:17 | 0:12 | 0:05 | IFR | 0:12 | 0:18 | 0:21 | 0:14 |

TABLE 2 – OVERALL USERS BY MEDIUM
NUMBER OF USERS 21+ (IN 000'S) - MONTHLY

| | COMPOSITE | | BLACK | | HISPANIC | | ASIAN AMERICAN | |
|----------------------------|-----------|---------|--------|--------|----------|--------|----------------|--------|
| | Q2 14 | Q2 15 | Q2 14 | Q2 15 | Q2 14 | Q2 15 | Q2 14 | Q2 15 |
| Live + DVR/Time-shifted TV | 210,772 | 211,696 | 25,888 | 26,342 | 31,619 | 31,915 | 11,097 | 11,207 |
| DVR/Time-shifted TV | 129,673 | 137,784 | 15,299 | 16,533 | 15,805 | 17,104 | 5,848 | 6,445 |
| AM/FM Radio | 222,042 | 223,566 | 27,143 | 27,380 | 34,088 | 34,415 | n/a | n/a |
| DVD/Blu-Ray Device | 99,635 | 94,198 | 11,368 | 10,838 | 14,242 | 13,190 | 4,813 | 4,525 |
| Game Console | 53,433 | 54,409 | 6,355 | 6,639 | 8,919 | 9,483 | 3,369 | 3,228 |
| Multimedia Device | 25,447 | 43,096 | 1,936 | 4,062 | 3,162 | 6,125 | 3,317 | 4,666 |
| Internet on a PC | 163,192 | 158,136 | 20,273 | 19,958 | 19,321 | 18,036 | 6,386 | 5,752 |
| Video on a PC | 122,714 | 115,672 | 15,319 | 14,769 | 14,168 | 12,578 | 5,179 | 4,404 |
| App/Web on a Smartphone | 149,778 | 167,265 | 18,501 | 20,143 | 26,595 | 27,873 | 8,828 | 9,689 |
| Video on a Smartphone | 110,083 | 124,879 | 15,109 | 16,384 | 21,568 | 22,603 | 6,645 | 7,153 |

TABLE 3 – MONTHLY TIME SPENT BY MEDIUM AMONG USERS
USERS IN HOURS: MINUTES AMONG P21+

| | COMPOSITE | | BLACK | | HISPANIC | | ASIAN AMERICAN | |
|----------------------------|-----------|--------|--------|--------|----------|--------|----------------|-------|
| | Q2 14 | Q2 15 | Q2 14 | Q2 15 | Q2 14 | Q2 15 | Q2 14 | Q2 15 |
| Live + DVR/Time-shifted TV | 159:12 | 156:25 | 232:45 | 223:51 | 130:26 | 126:01 | 92:55 | 91:19 |
| DVR/Time-shifted TV | 25:48 | 25:21 | 24:14 | 23:11 | 20:36 | 20:16 | 19:31 | 19:22 |
| AM/FM Radio | 62:25 | 61:03 | 65:32 | 63:17 | 63:09 | 61:46 | n/a | n/a |
| DVD/Blu-Ray Device | 9:38 | 9:16 | 13:25 | 11:56 | 8:54 | 9:17 | 7:52 | 8:22 |
| Game Console | 18:59 | 23:26 | 23:06 | 29:35 | 16:36 | 21:05 | 11:01 | 16:34 |
| Multimedia Device | 21:01 | 23:58 | 22:46 | 22:20 | 17:47 | 21:09 | 26:00 | 29:10 |
| Internet on a PC | 34:03 | 32:32 | 37:35 | 36:38 | 32:25 | 31:06 | 47:16 | 40:53 |
| Video on a PC | 10:57 | 12:49 | 14:27 | 17:06 | 12:54 | 14:22 | 17:21 | 15:54 |
| App/Web on a Smartphone | 43:17 | 45:44 | 51:24 | 52:50 | 49:04 | 51:24 | 41:49 | 42:54 |
| Video on a Smartphone | 1:41 | 1:59 | 2:22 | 2:52 | 2:26 | 3:07 | 2:00 | 2:43 |

The data sources in Table 3 should not be added or subtracted; they are based on users of each medium and the bases vary by source.

**TABLE 4A – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES AMONG USERS
AMONG COMPOSITE**

| | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ |
|----------------------------|------------|------------|------------|------------|----------|----------|
| Live + DVR/Time-shifted TV | 103:23 | 107:52 | 134:16 | 179:57 | 214:52 | 156:25 |
| DVR/Time-shifted TV | 19:41 | 21:19 | 25:30 | 28:20 | 27:51 | 25:21 |
| AM/FM Radio | 52:11 | 53:16 | 62:04 | 68:46 | 60:24 | 61:03 |
| DVD/Blu-Ray Device | 11:52 | 11:33 | 9:02 | 9:01 | 7:00 | 9:16 |
| Game Console | 34:33 | 29:30 | 16:03 | 11:33 | 10:07 | 23:26 |
| Multimedia Device | 29:15 | 28:48 | 21:55 | 19:40 | 22:38 | 23:58 |
| Internet on a PC | 33:46 | 34:11 | 34:12 | 34:04 | 24:24 | 32:32 |
| Video on a PC | 17:57 | 17:30 | 13:57 | 10:51 | 5:42 | 12:49 |
| App/Web on a Smartphone | 54:27 | 52:55 | 49:55 | 36:44 | 28:05 | 45:44 |
| Video on a Smartphone | 2:56 | 2:34 | 1:49 | 1:14 | 0:39 | 1:59 |

**TABLE 4B – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES AMONG USERS
AMONG BLACKS**

| | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ |
|----------------------------|------------|------------|------------|------------|----------|----------|
| Live + DVR/Time-shifted TV | 157:08 | 162:45 | 202:37 | 265:12 | 316:25 | 223:51 |
| DVR/Time-shifted TV | 18:58 | 20:17 | 25:33 | 24:44 | 23:08 | 23:11 |
| AM/FM Radio | 52:11 | 54:25 | 64:14 | 74:07 | 64:27 | 63:17 |
| DVD/Blu-Ray Device | 15:40 | 14:44 | 10:54 | 12:20 | 7:19 | 11:56 |
| Game Console | 38:39 | 36:05 | 23:30 | 14:33 | 15:35 | 29:35 |
| Multimedia Device | 24:55 | 24:24 | 22:10 | 18:17 | 18:38 | 22:20 |
| Internet on a PC | 37:36 | 36:45 | 40:37 | 34:41 | 25:38 | 36:38 |
| Video on a PC | 22:36 | 22:08 | 18:52 | 13:00 | 5:33 | 17:06 |
| App/Web on a Smartphone | 65:48 | 70:29 | 60:32 | 39:53 | IFR | 52:50 |
| Video on a Smartphone | 4:33 | 4:18 | 3:00 | 1:28 | IFR | 2:52 |

The data sources in Table 4 should not be added or subtracted; they are based on users of each medium and the bases vary by source.

**TABLE 4C – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES AMONG USERS
AMONG HISPANICS**

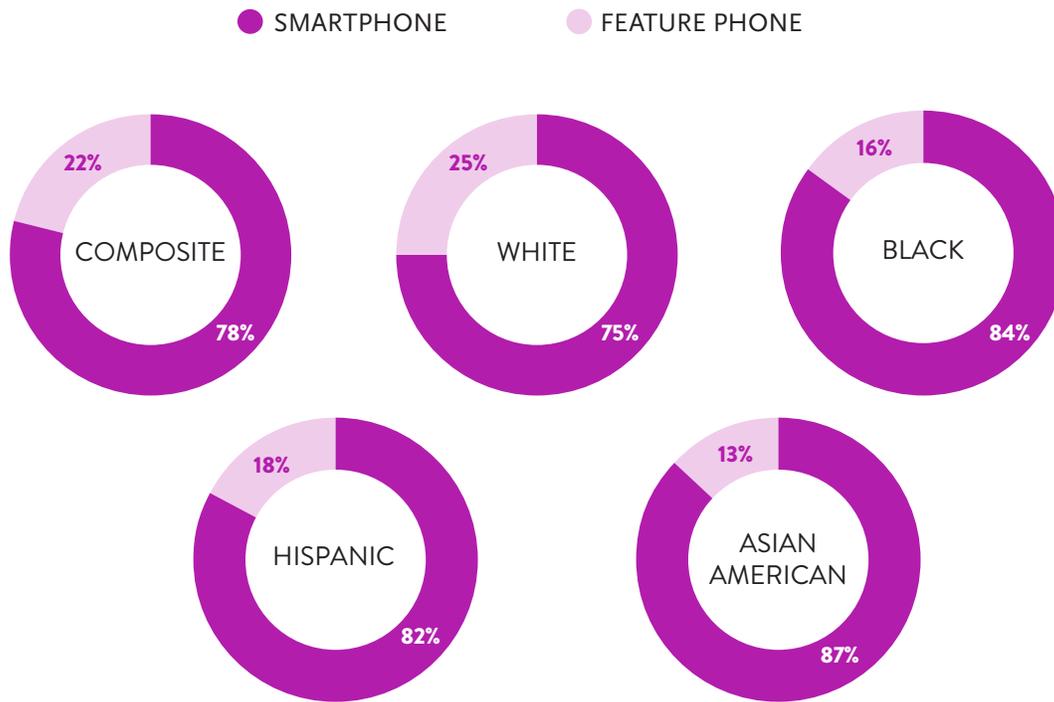
| | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ |
|----------------------------|------------|------------|------------|------------|----------|----------|
| Live + DVR/Time-shifted TV | 93:14 | 98:54 | 116:20 | 153:37 | 216:13 | 126:01 |
| DVR/Time-shifted TV | 17:52 | 19:17 | 18:54 | 23:35 | 27:09 | 20:16 |
| AM/FM Radio | 55:04 | 56:35 | 65:10 | 67:37 | 65:23 | 61:46 |
| DVD/Blu-Ray Device | 10:27 | 10:17 | 8:29 | 10:12 | 6:04 | 9:17 |
| Game Console | 29:28 | 24:10 | 12:45 | 9:00 | 10:17 | 21:05 |
| Multimedia Device | 24:26 | 25:36 | 18:50 | 17:22 | 21:24 | 21:09 |
| Internet on a PC | 34:37 | 35:40 | 30:28 | 26:35 | 27:30 | 31:06 |
| Video on a PC | 17:48 | 18:12 | 14:10 | 10:13 | 7:18 | 14:22 |
| App/Web on a Smartphone | 57:47 | 54:38 | 52:23 | 36:58 | IFR | 51:24 |
| Video on a Smartphone | 4:04 | 3:21 | 2:22 | 2:07 | IFR | 3:07 |

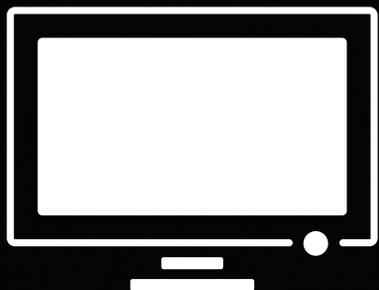
**TABLE 4D – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES AMONG USERS
AMONG ASIAN AMERICANS**

| | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ |
|----------------------------|------------|------------|------------|------------|----------|----------|
| Live + DVR/Time-shifted TV | 58:04 | 61:01 | 73:59 | 106:26 | 154:32 | 91:19 |
| DVR/Time-shifted TV | 14:20 | 14:55 | 19:40 | 23:42 | 23:00 | 19:22 |
| DVD/Blu-Ray Device | 11:23 | 10:06 | 6:57 | 6:21 | 11:18 | 8:22 |
| Game Console | 25:33 | 22:51 | 12:11 | 12:29 | 10:06 | 16:34 |
| Multimedia Device | 29:38 | 29:53 | 25:49 | 31:31 | 40:23 | 29:10 |
| Internet on a PC | 49:26 | 47:45 | 43:31 | 25:54 | 23:51 | 40:53 |
| Video on a PC | 21:52 | 22:22 | 14:09 | 8:58 | 9:44 | 15:54 |
| App/Web on a Smartphone | 43:59 | 41:23 | 48:04 | IFR | IFR | 42:54 |
| Video on a Smartphone | 2:12 | 2:11 | 2:43 | IFR | IFR | 2:43 |

The data sources in Table 4 should not be added or subtracted; they are based on users of each medium and the bases vary by source.

EXHIBIT 3 – MOBILE DEVICE PENETRATION AMONG MOBILE SUBSCRIBERS 21+





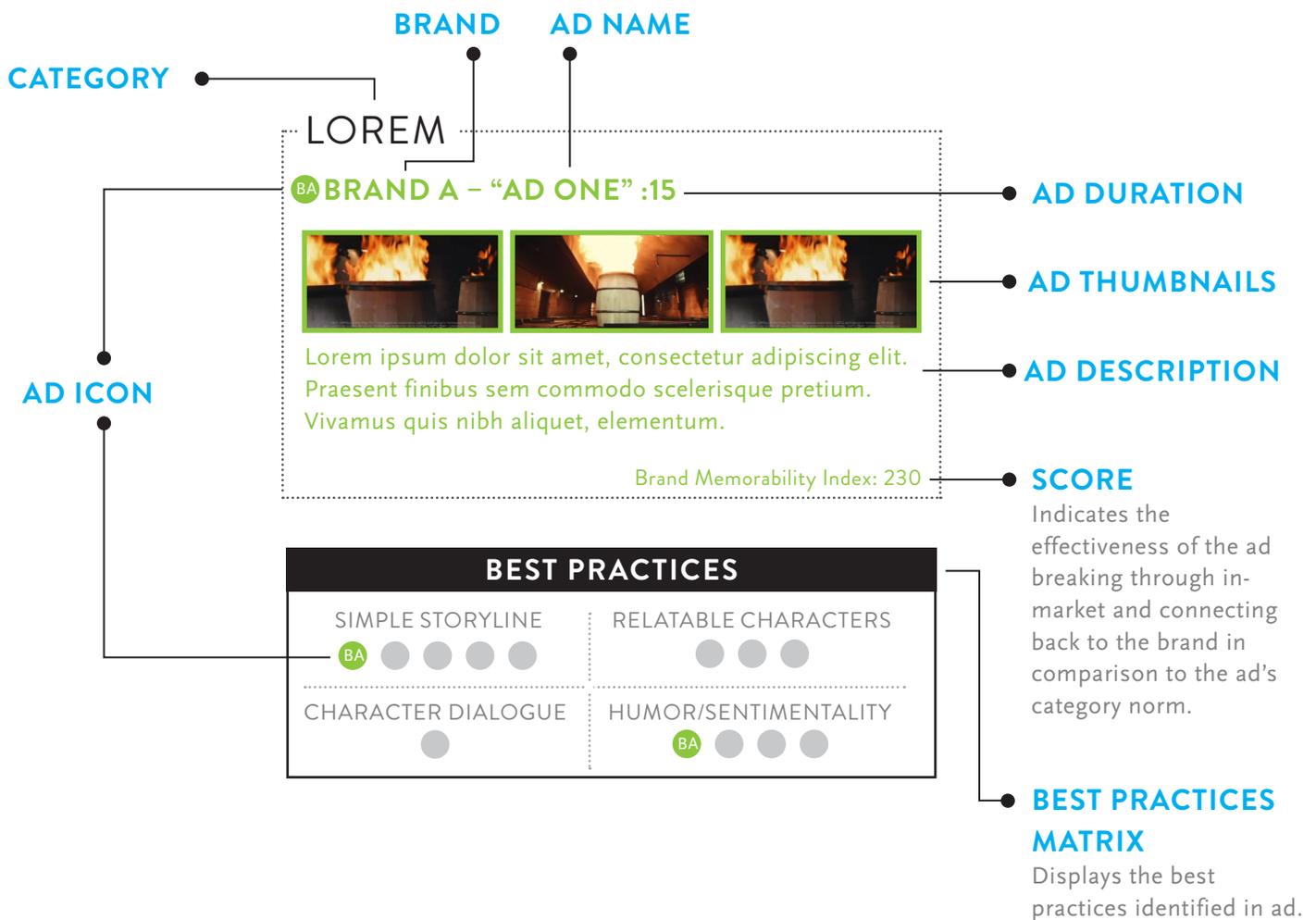
THE BEST OF THE BEST: TOP BEV-AL TELEVISION ADS



The goal of TV advertising is lasting top-of-mind awareness of a brand and product, but today's consumers have more access to more information than ever before, and we are consuming information at a faster and faster rate. The average adult (21+) watches 4 hours of TV per day. This equates to about 250 ad impressions per day, or 1,750 ad impressions per week.

The ads showcased in this section were able to break through the clutter of real-world TV ad viewing—including the impact of multi-tasking and life's many other distractions—to deliver high performance in Brand Memorability.

HOW TO READ TOP ADS PERFORMANCE SECTION:



TOP TV BEVERAGE ALCOHOL ADS: Q2 2015

NIELSEN TV BRAND EFFECT

SPIRITS

JD JACK DANIEL'S – "CHARRED BARRELS" :15



Jack Daniel's makes an emotional connection with viewers by providing a behind the scenes look at production while leveraging the barrel as an ownable concept and its brand icon.

Brand Memorability Index: 230

FMBS & CIDERS

RD REDD'S – "BONFIRE" :15



Redd's checks off many of the creative best practices including establishing an ownable creative concept, use of appropriate humor, character dialogue and incorporating brand cues early and often.

Brand Memorability Index: 161

BEER

CN CORONA – "SUMMER FIRES" :15



Corona successfully utilizes a simple, upbeat storyline with relatable characters and situations while connecting viewers with the beach/summer as an ownable concept.

Brand Memorability Index: 142

CR COORS – "BORN IN THE ROCKIES - MILLIONS" :30



Coors' usage of a simple story line and the Rocky Mountains, which have become a recognizable brand icon for Coors, help this ad break through the clutter.

Brand Memorability Index: 142

WINE

WB WOODBRIDGE – "MOMENTS" :15



Woodbridge leverages brand cues early in the ad, provides a simple story line with relatable characters and has established an ownable creative concept over time that creates an emotional connection with viewers.

Brand Memorability Index: 141

BREAKTHROUGH BEST PRACTICES

SIMPLE STORYLINE

JD RD CN CR WB

RELATABLE CHARACTERS

RD CN WB

CHARACTER DIALOGUE

RD

HUMOR/SENTIMENTALITY

JD RD CN WB

BRANDING BEST PRACTICES

EARLY VISUAL/VERBAL CUES

RD WB

LEVERAGE BRAND ICON

JD RD CR

OWNABLE CONCEPT

JD RD CR WB

BRAND IN STORYLINE

JD RD CN CR WB

Source: Nielsen TV Brand Effect, 4.1.2015 - 6.30.2015, A21+
Evaluating English-language ads on English-language networks within TV Brand Effect coverage only.
Scores are for Q2 2015 airings ONLY. Only ads that debuted after 4.1.2014 were considered. Ads with less than 100 sample were not considered.
Branded Memorability indexed against the corresponding 2012-2014 category norms for Branded Memorability.
Beer: 26%, Wine: 22%, Spirits: 20%, FMBs & Ciders: 31%

TOP TV BEVERAGE ALCOHOL ADS: Q1 2015

NIELSEN TV BRAND EFFECT

BEER

DE DOS EQUIS – “LAND, SEA, AIR AND BEYOND” :30



Dos Equis checks off many breakthrough best practices by using humor and a simple storyline and leveraging what has become one of its brand icons, “The Most Interesting Man in the World.”

Brand Memorability Index: 142

SPIRITS

JD JACK DANIEL’S – “BARRELS” :30



Jack Daniel’s makes an emotional connection with viewers by providing a behind the scenes look at production while leveraging the barrel as an ownable concept and its brand icon.

Brand Memorability Index: 195

WINE

WB WOODBRIDGE – “MOMENTS” :15



Woodbridge leverages brand cues early in the ad, provides a simple story line with relatable characters and has established an ownable creative concept over time that creates an emotional connection with viewers.

Brand Memorability Index: 150

FMBS & CIDERS

RD REDD’S – “MAKE IT TWO” :15



Redd’s employs many of the best practices including establishing a unique and “ownable” creative concept, use of character dialogue and incorporating brand cues early and often.

Brand Memorability Index: 139

BREAKTHROUGH BEST PRACTICES

SIMPLE STORYLINE

DE RD

RELATABLE CHARACTERS

DE JD WB RD

CHARACTER DIALOGUE

RD

HUMOR/SENTIMENTALITY

DE JD WB RD

BRANDING BEST PRACTICES

EARLY VISUAL/VERBAL CUES

WB RD

LEVERAGE BRAND ICON

DE RD

OWNABLE CONCEPT

DE JD RD

BRAND IN STORYLINE

WB RD

Source: Nielsen TV Brand Effect; Demo: A21+

Evaluating English-language ads on English-language networks within TV Brand Effect coverage only.

Scores are for Q1 2015 airings ONLY. Only ads that debuted after 1.1.2014 were considered.

Ads with less than 100 sample were not considered.

Branded Memorability indexed against the corresponding 2012-2014 category norms for Branded Memorability.

Beer: 26%, Wine: 22%, Spirits: 20%, FMBs & Ciders: 31%

SOURCING & METHODOLOGIES

TELEVISION METHODOLOGY

Live + DVR/Time-shifted TV includes Live usage plus any playback viewing within the measurement period. DVR/Time-shifted TV is playback primarily on a DVR but includes playback from video on demand, DVD recorders, server based DVR's and services like Start Over.

TV connected devices (DVD, Game Console, Multimedia Device) would include content being viewed on the TV through these devices. This would include when these devices are in use for any purpose, not just for accessing media content. For example, Game Console would also include when the game console is being used to play video games.

Multimedia Devices would include viewing on an Apple TV, Roku, Google Chromecast, Smartphone, Computer/Laptop, etc. connected to the TV.

Reach for television and TV connected devices includes those viewing at least one minute within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

AM/FM RADIO METHODOLOGY

Listening to programming from AM/FM radio stations or network programming.

Audience estimates for 48 large markets are based on a panel of people who carry a portable device called a Personal People Meter (PPM) that passively detects exposure to content that contains inaudible codes embedded within the program content. Audience estimates from the balance of markets and counties in the U.S. are based on surveys of people who record their listening in a written diary for a week.

The estimates in this report are based on RADAR and the National Regional Database. RADAR reports national network radio ratings covering the U.S. using both PPM and Diary measurement and it is based on a rolling one-year average of nearly 400,000 respondents aged.

Monthly Radio Estimates: Nielsen's Measurement Science group used statistical modeling techniques to estimate the total cume audience to radio in a four week period, as compared to the total cume audience to radio in an average week. The methodology utilized PPM panel data, and essentially measured how many people who were not exposed to radio in a single week might typically be exposed to radio over a consecutive four week period. A radio cume growth factor was then determined and applied to radio listening on a national basis.

Listening to HD radio broadcasts, Internet streams of AM/FM radio stations and Satellite Radio is included the Persons Using Radio estimates in this report where the tuning meets our reporting and crediting requirements.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

ONLINE METHODOLOGY

Nielsen's Online Panel is recruited based on an opt-in convenience panel. Online recruitment pages are offered in both English and Spanish. Panelists then download Nielsen's patented desktop NetSight meter, which accurately identifies which browser, tab, Internet application (including media players and instant messaging) or desktop application is in focus. Nielsen's Online Panel tracks usage across web sites and digital applications to deliver audience and analytics through metered measurement of panels of Internet users at both home and work.

In July 2011, an improved hybrid methodology was introduced in Nielsen's NetView and VideoCensus product. This methodology combines a census level accounting of page views and video streams where Nielsen measurement tags have been deployed in order to project audience and behavior to the full universe of all Internet users. For VideoCensus, the portion of the total video streams calibrated by census data, previously allocated to Home/Work computers, are now allocated to other devices and locations such as smartphones and viewing outside of home and work. This change affects both Video on a PC and Internet on a PC figures.

Hours:minutes for Internet and video use are based on the universe of persons who used the Internet/watched online video. All Internet figures are weekly or monthly averages over the course of the quarter. All Internet on a PC metrics are derived from Nielsen NetView, while all Video on a PC metrics are derived from Nielsen VideoCensus. The audience of Video on a PC is a subset of Internet on a PC.

MOBILE METHODOLOGY

Nielsen's Electronic Mobile Measurement (EMM) is an observational, user-centric approach that uses passive metering technology on smartphones to track device and application usage on an opt-in convenience panel, recruited online and in English. Results are then reported out through Nielsen Mobile NetView 3.0. There are approximately 6,000 panelists in the U.S. across both iOS and Android smartphone devices. This method provides a holistic view of all activity on a smartphone as the behavior is being tracked without interruption.

A number of steps are taken after the data collection process to ensure the reported data is representative of the mobile population. Weighting controls are applied across five characteristics (gender, age, income, race and ethnicity) while independent enumeration studies are carried out on a continuous basis to provide the most current estimates of the mobile population (aka Universe Estimation). This mobile population is drawn from a combination of Mobile Insights, as well as surveying the National People Meter (NPM) panel that is the industry standard for TV Ratings.

Figures reported in Nielsen's Mobile NetView 3.0 include those individuals who are 21+ who have used an iOS or Android smartphone device in the U.S. In particular:

App/Web on a Smartphone refers to consuming mobile media content through a web browser or via a mobile app. It does not include other types of activity such as making/receiving phone calls, sending SMS/MMS messages etc, which has been excluded for this report.

Video on a Smartphone is a subset of App/Web on a Smartphone and refers to those individuals who visit a website or use a mobile app specifically designed to watch video content.

TV BRAND EFFECT METHODOLOGY

Nielsen TV Brand Effect employs a nationally representative online panel of U.S. TV viewers who have watched programs within the past 24 hours. These panelists answer survey questions about the programs they watched and the commercials they were exposed to. Since the panelists respond based on what they watched in a natural environment, the results reflect real-life reaction to and memory of television commercials. Nielsen logs and issues surveys for all national commercials within its coverage dayparts and networks. Advertisements evaluated for this report were English-language ads viewed on English-language networks within TV Brand Effect coverage only.

BRAND MEMORABILITY INDEX

The Brand Memorability Index represents an ad's Brand Memorability indexed against that ad's category average for adults 21+. A Brand Memorability Index of 100 indicates that the ad is performing at the category average.

AD MEMORABILITY

The percentage of an ad's natural in-home viewers who are able to remember its content the next day.

BRAND LINKAGE

Of those viewers who remember an ad's content (Ad Memorability), the percentage that are able to identify the advertised brand.

BRAND MEMORABILITY

The percentage of viewers who are able to remember both the ad's content and the advertised brand (Ad Memorability * Brand Linkage).

SOURCING

EXHIBIT 1, 2 & TABLES 1, 2, 3, 4 - AVERAGE TIME SPENT PER ADULT 21+ PER DAY, A WEEK IN THE LIFE, OVERALL USERS BY MEDIUM, MONTHLY TIME SPENT BY MEDIUM AMONG USERS

Source: Live + DVR/Time-shifted TV, DVR/Time-shifted TV, DVD, Game Consoles, Multimedia Devices 03/30/2015 - 06/28/2015 via Nielsen NPOWER/NPM Panel, Radio 03/27/14-03/25/15 via RADAR 125, PC 04/01/15-06/30/15 via Nielsen Netview and Nielsen VideoCensus, Mobile 04/01/15-06/30/15 via Nielsen Electronic Mobile Measurement.

Exhibit 1 and Table 1 are based on the total U.S. population whether or not they have the technology.

Exhibit 2 and Tables 2-4 are based on users of each medium.

EXHIBIT 3 – MOBILE DEVICE PENETRATION BY ETHNICITY AMONG MOBILE SUBSCRIBERS 21+

Source: Mobile 04/01/15-06/30/15 via Nielsen Mobile Insights.

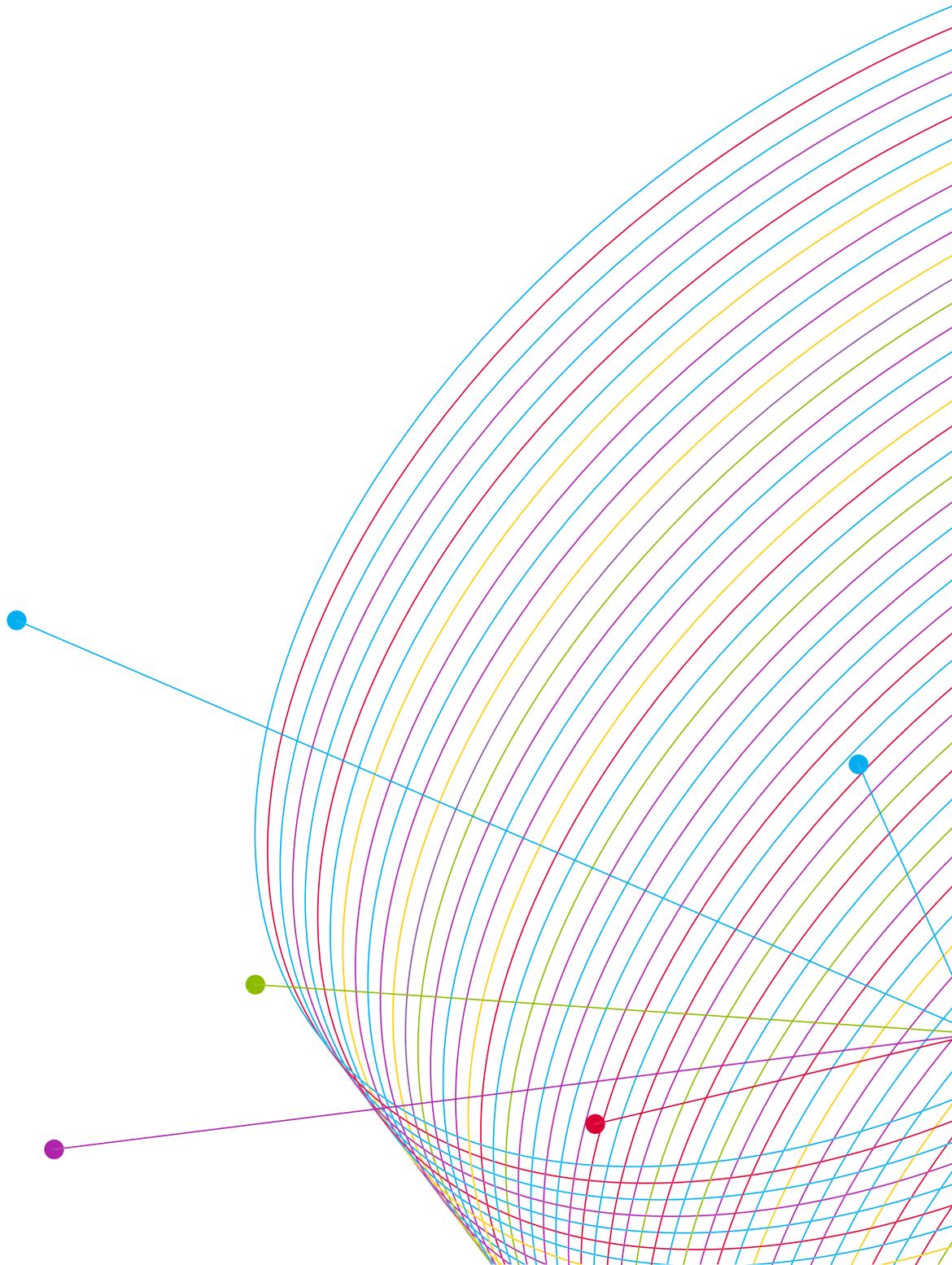
Note: IFR represents data that is insufficient for reporting due to small sample sizes. n/a represents data unavailability.

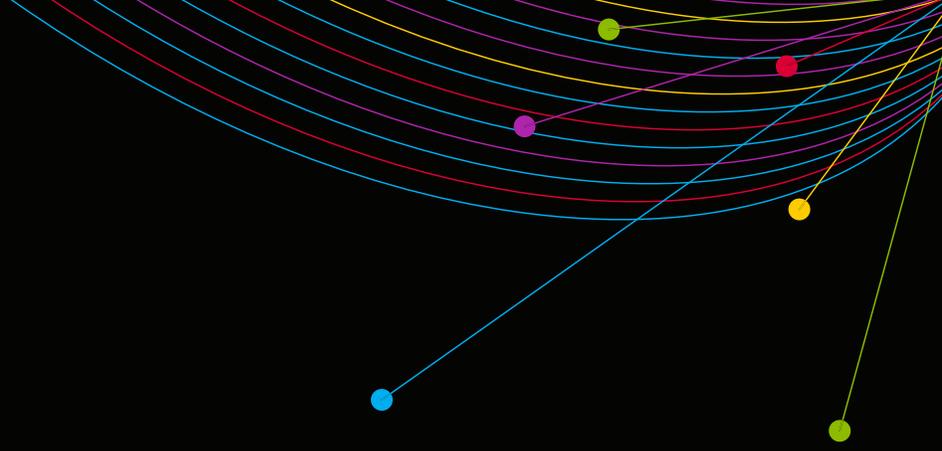
ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world's population.

For more information, visit www.nielsen.com.

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