

About PQ Media: Who We Are, What We Do & How We Do It



the leader in media econometrics

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*"we stay ahead of the curve
to keep you ahead of the curve"*

Why PQ Media

Current Situation

- Economy is in reset mode
- Consumer and advertiser behavior is being rewired
- Traditional media dollars are being redistributed
- Media landscape being redrawn

What's The Effect On Media and Communications?



PQ Media Actionable Strategic Intelligence Empowers Clients

- Estimate the size of media markets with greater confidence
- Forecast advertising spend and time spent with media
- Map companies within each media business sector
- Identify high growth sectors, media segments and sub-segments
- Evaluate potential investment opportunities
- Develop and execute research protocols and perception studies
- Develop strategic initiatives with the greatest likelihood for success
- Develop proactive “what if” scenarios

That's Why Industry Leaders Employ PQ Media

- Accenture
- Associated Press
- AT&T
- Bank of America
- Bloomberg
- Booz & Company
- Boston Consulting Group
- Credit Suisse
- DDB Worldwide
- Deloitte
- Ernst & Young
- GE Commercial Finance
- Google
- IBM
- Kinetic Worldwide
- Leo Burnett
- McKinsey & Co.
- Microsoft
- Morgan Stanley
- NBC Universal
- Time Warner/Turner
- UBS
- Verizon
- Walt Disney

PQ Media's Value Proposition

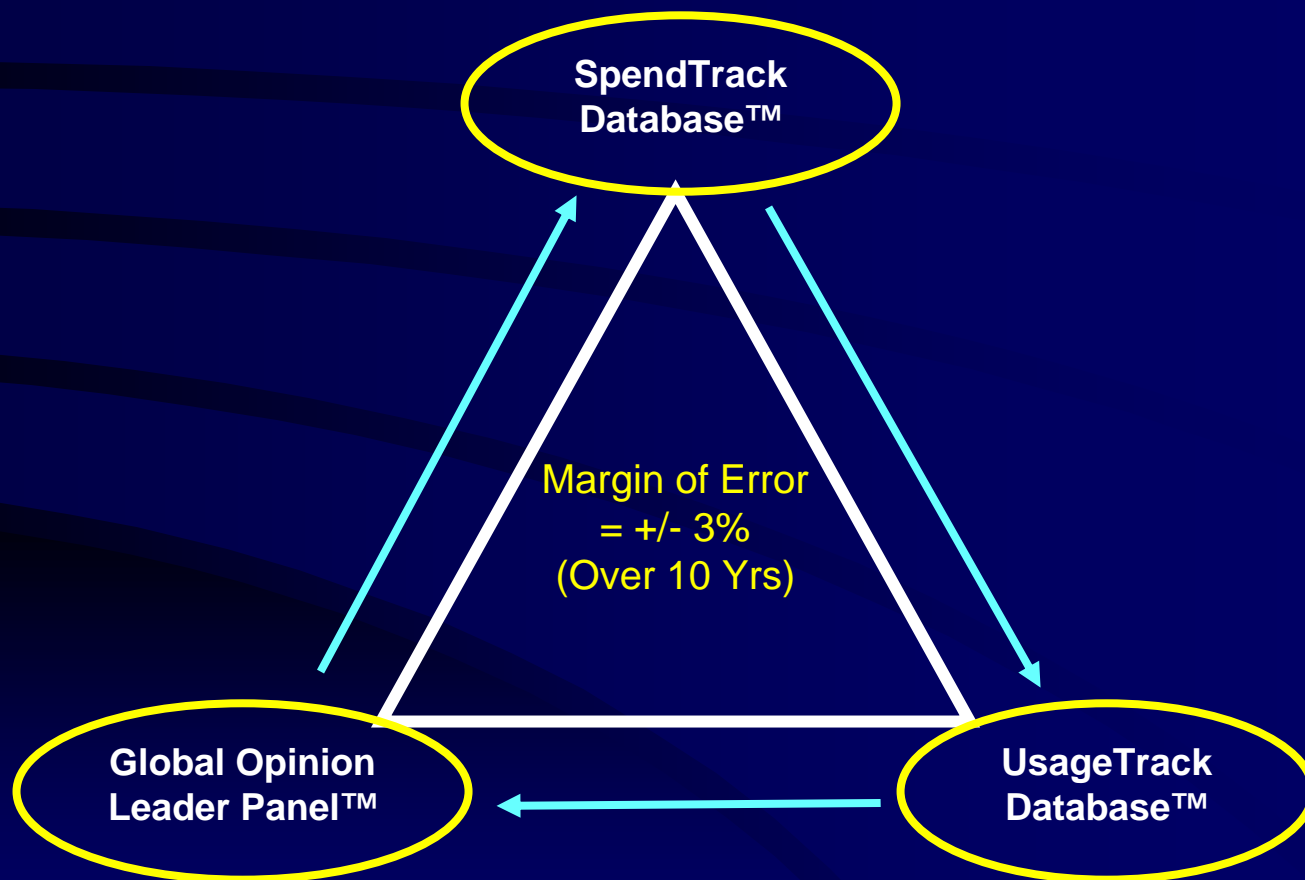
PQ Media is the leading provider of global media econometrics and pioneer of 21st century alternative media research. Our experienced management team and analysts are mapping the next frontier of media comprised of 20 media and communications segments and more than 100 sub-segments.

PQ Media advises top executives at leading media companies, financial institutions, agencies, brands and management consulting firms on real growth opportunities in the fragmented media landscape, based on our accurate media spending and usage forecasts. Through our custom research, syndicated reports and proprietary PQ Medianomics™ methodology, clients receive unbiased insights and actionable strategic intelligence they can't find anywhere else.

PQ Media partners with Veronis Suhler Stevenson on the annual *VSS Communications Industry Forecast*, the industry benchmark for media spending, usage and forecast research.

PQ Media's Proprietary Methodology

- **PQ Medianomics™** is driven by data collection techniques, algorithms and formulas synthesized with analytic approaches to determine forecast models for media spending, usage, and trends
- **PQ Media** has consistently predicted key trends, insights and outcomes that have influenced strategic plans, investment parameters and tactical approaches



PQ Media Differs from Competition in 5 Key Aspects

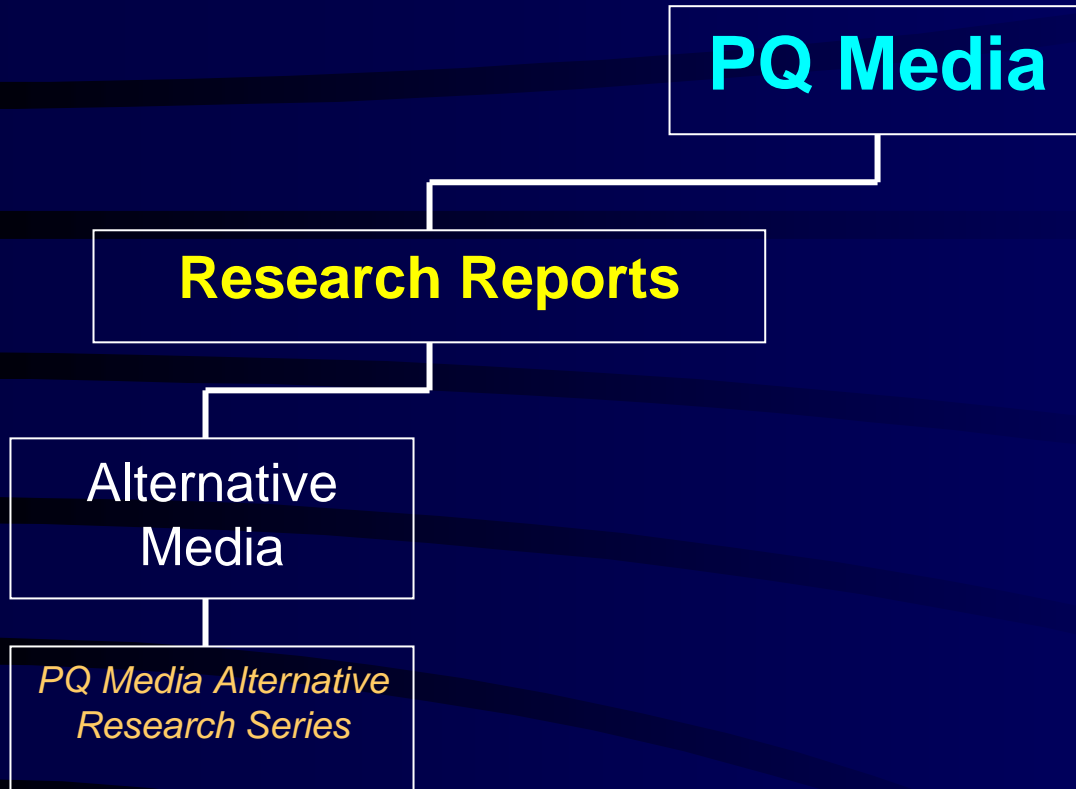
- Exclusive Global Opinion Leader Panel™
- Breadth /depth of data/analysis: 4 sectors, 20 segments, 150 sub-segments
- Most comprehensive spending and consumption databases worldwide
- Consistent data series, recalibrated annually
- Most accurate 35-year historical and 5-year forecast data

Comparison of Communications Segments Covered by Select Research Companies

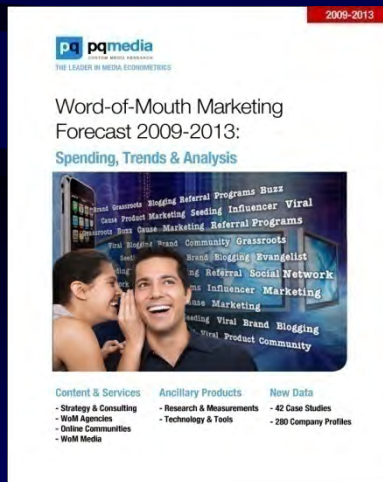
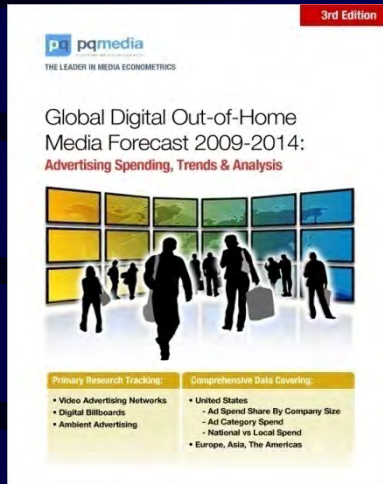
20 MAJOR COMMUNICATIONS SEGMENTS*	PQ Media	SNL Kagan	PWC	Kantar (TNS)	Nielsen
Branded Entertainment	X				X
Broadcast & Satellite Radio	X	X	X	X	X
Broadcast Television	X	X	X	X	X
Business-to-Business Media	X	X	X		
Business-to-Business Promotions	X				
Business & Professional Information	X		X		
Business & Professional Services	X				
Consumer Book Publishing	X	X	X		
Consumer Magazine Publishing	X	X	X	X	X
Consumer Promotions	X				
Direct Marketing	X				
Educational & Training Media & Services	X		X		
Entertainment Media	X	X	X		
Internet & Mobile Services	X	X	X	X	X
Newspaper Publishing	X	X	X	X	X
Out-of-Home Media	X	X	X	X	X
Outsourced Custom Publishing	X				
Public Relations & Word-of-Mouth	X				
Subscription TV	X	X	X	X	X
Yellow Pages Directories	X		X		

PQ Media Services

PQ Media's Services



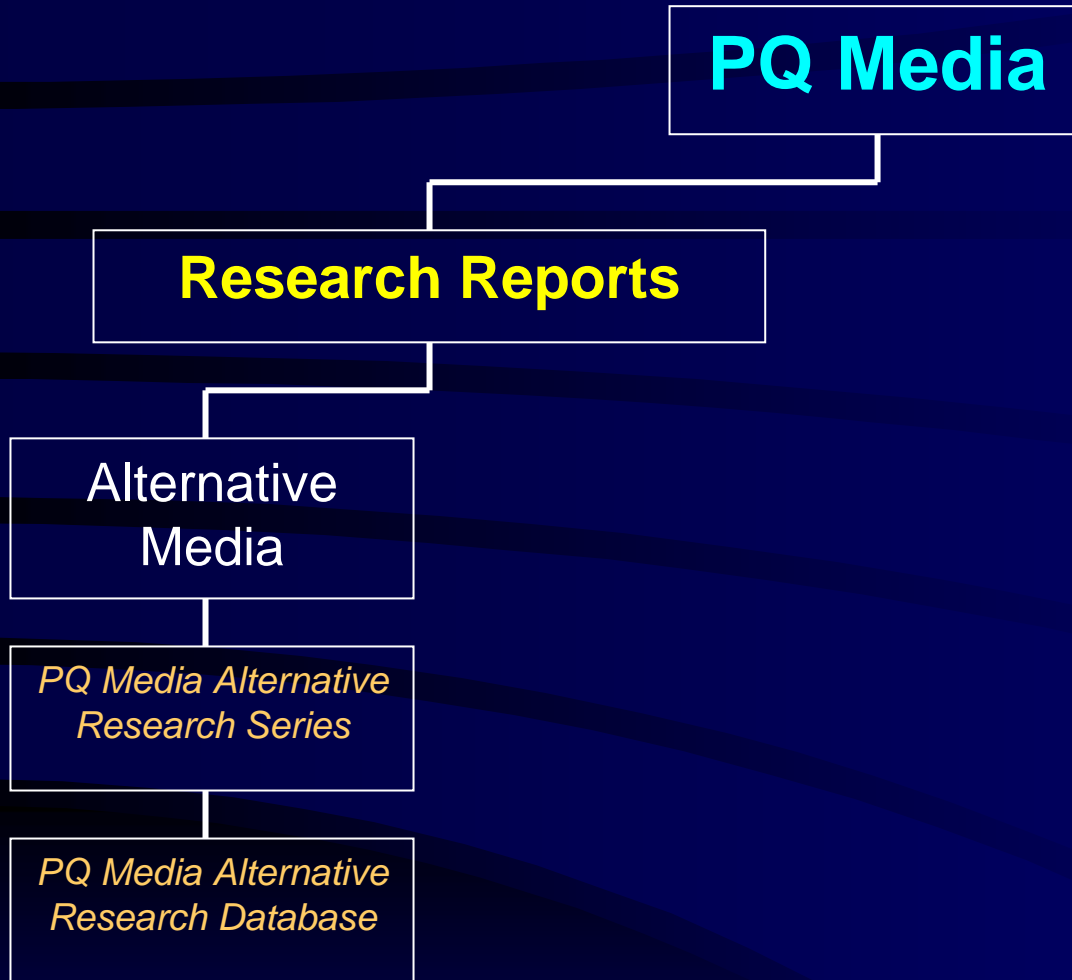
PQ Media's Alternative Media Research Series



“PQ Media is one of the most respected researchers tracking the economics of media.”

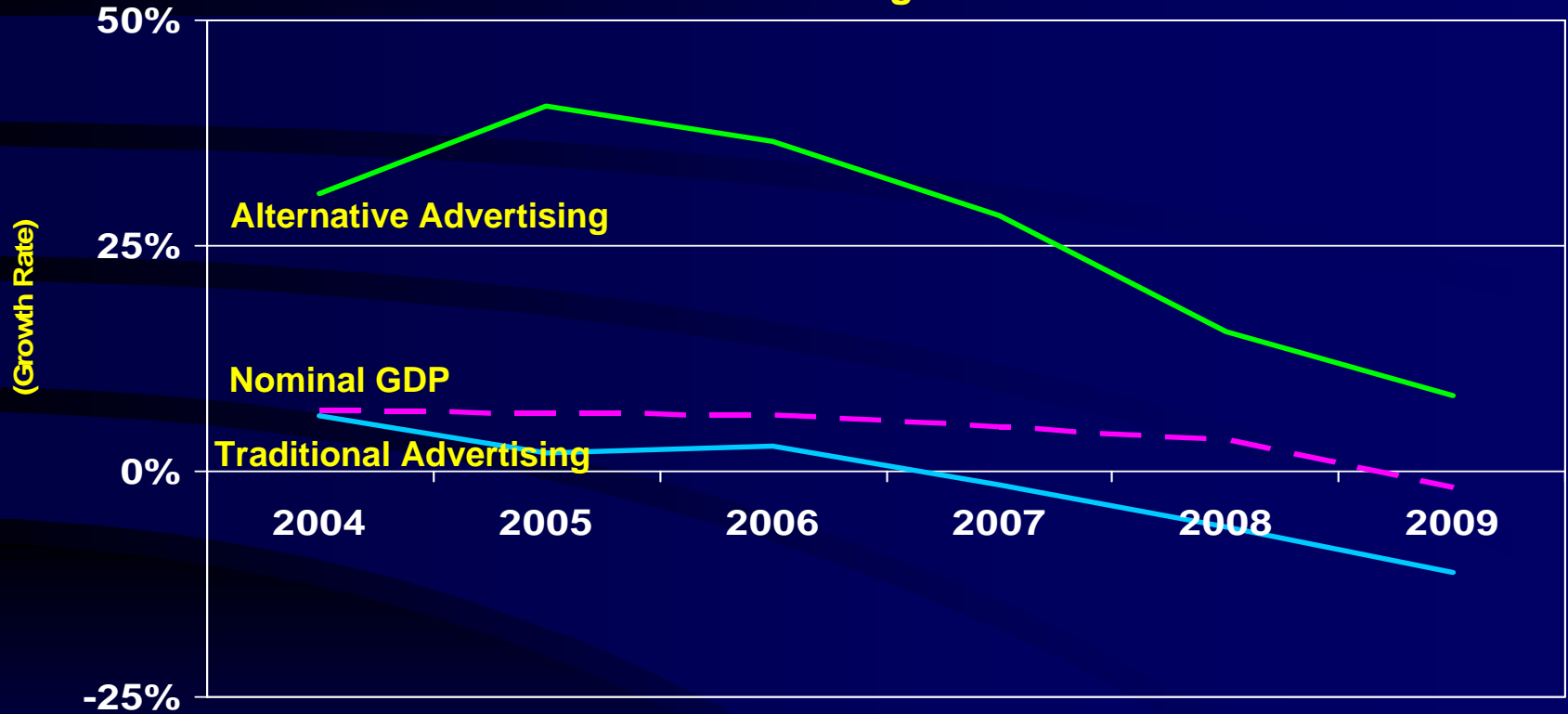
-MediaPost

PQ Media's Services



PQ Media's Historical Alternative Media Database

Alternative vs. Traditional Advertising Growth Rates: 2004 to 2009



Source: PQ Media

PQ Media's Services



PQ Media Data & Report Licensing

PQ Media Publication

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Social Media Sponsorships Forecast 2010-2014



**Primary Research
Tracking & Analysis:**

- Sponsored Conversations
- Digital Brand Ambassador Programs
- Digital Seed/Viral Campaigns
- Digital Marketing Agencies

First-Ever Data Covering

- Definitions & Segmentation
- Trends & Drivers
- Spending 2004 – 2009
- Forecast 2010 – 2014
- Spending By Marketing Category
- More Than 40 Company Profiles
With Contacts

Client Custom Publication

Your Report on Media Consumption By Women

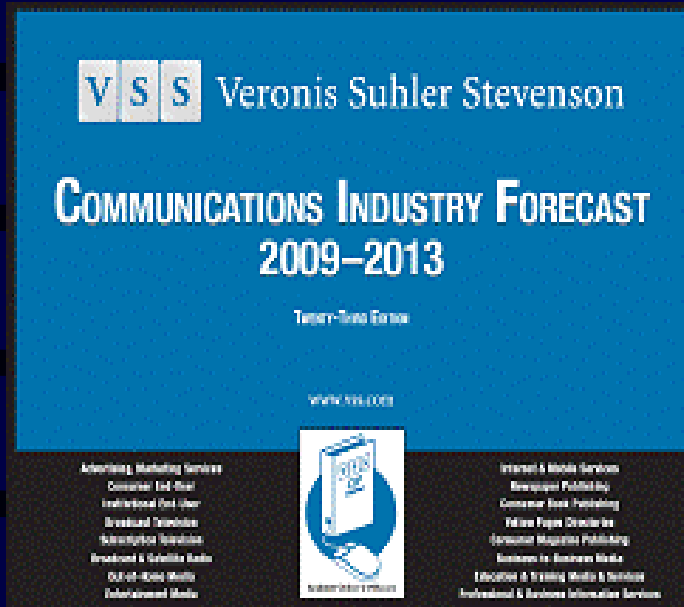
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THE LEADER IN MEDIA ECONOMETRICS

Prepared by

PQ Media's Services



VSS Communications Industry Forecast



“The yearly Communications Industry Forecast is viewed as a must-have research and planning tool by media executives.”

-USA Today

SEGMENT	2008 Spend (\$B)	2003-08 CAGR
Subscription TV	\$146.24	10.2%
Professional & Business Information Services	137.76	10.8
Direct Marketing	106.52	5.6
Entertainment Media	88.77	2.4
Newspaper Publishing	54.16	-3.0
Broadcast Television	49.08	3.0
Consumer Promotions	46.12	2.9
Pure-Play Internet & Mobile Services	42.34	14.2
Educational & Training Media & Services	35.59	6.7
Business-to-Business Promotions	27.72	1.5
Branded Entertainment	24.97	14.0
Business-to-Business Media	24.82	4.5
Consumer Book Publishing	23.07	2.5
Consumer Magazine Publishing	22.91	1.1
Broadcast & Satellite Radio	20.28	0.6
Yellow Pages Directories	15.44	0.9
Out-of-Home Media	8.08	9.0
Public Relations	3.65	8.5
Outsourced Custom Publishing	3.55	5.3
Word-of-Mouth Marketing	1.54	37.6
Total Communications	882.61	5.6

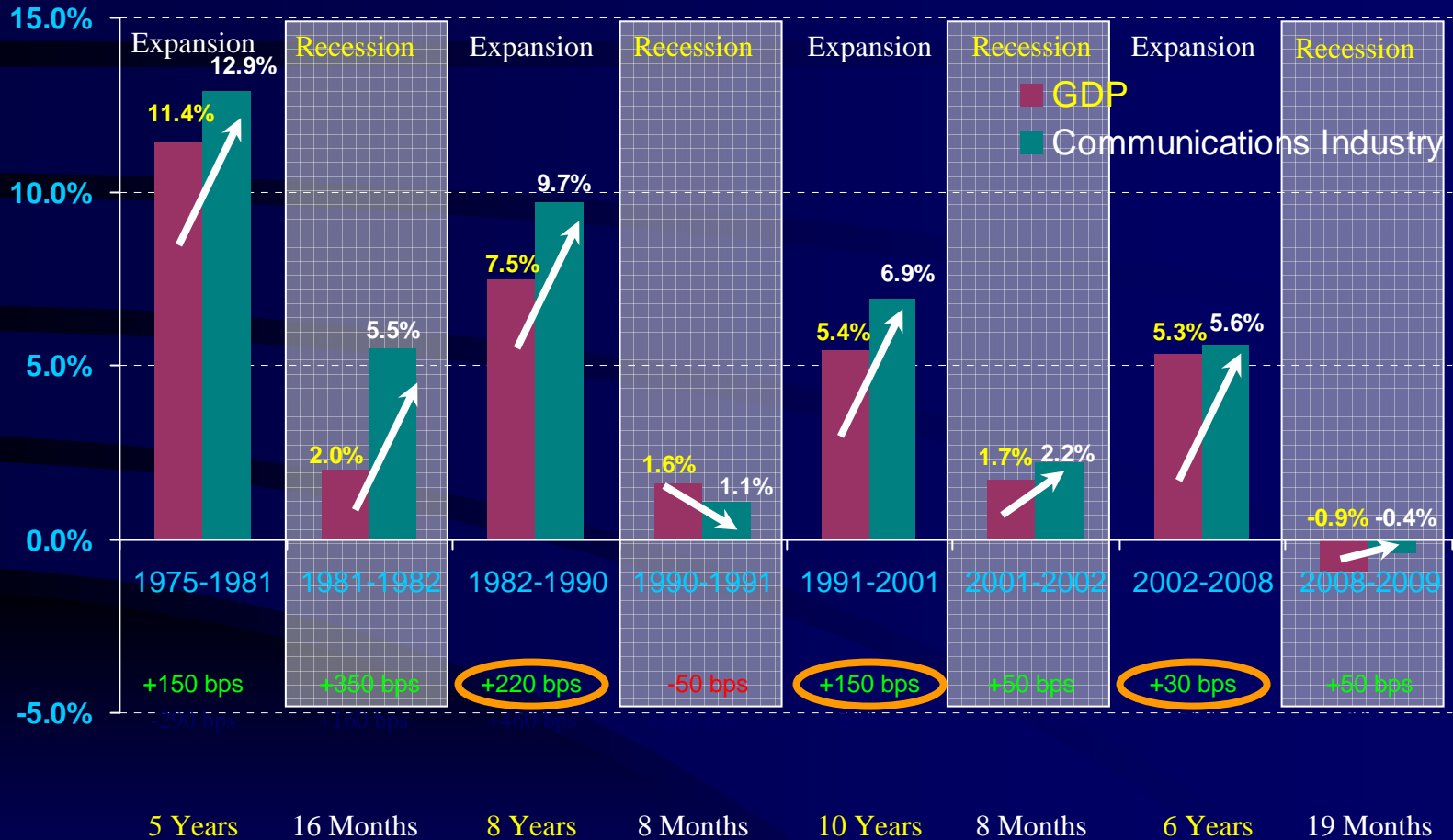
Sources: VSS Communications Industry Forecast 2009, PQ Media

PQ Media's Services



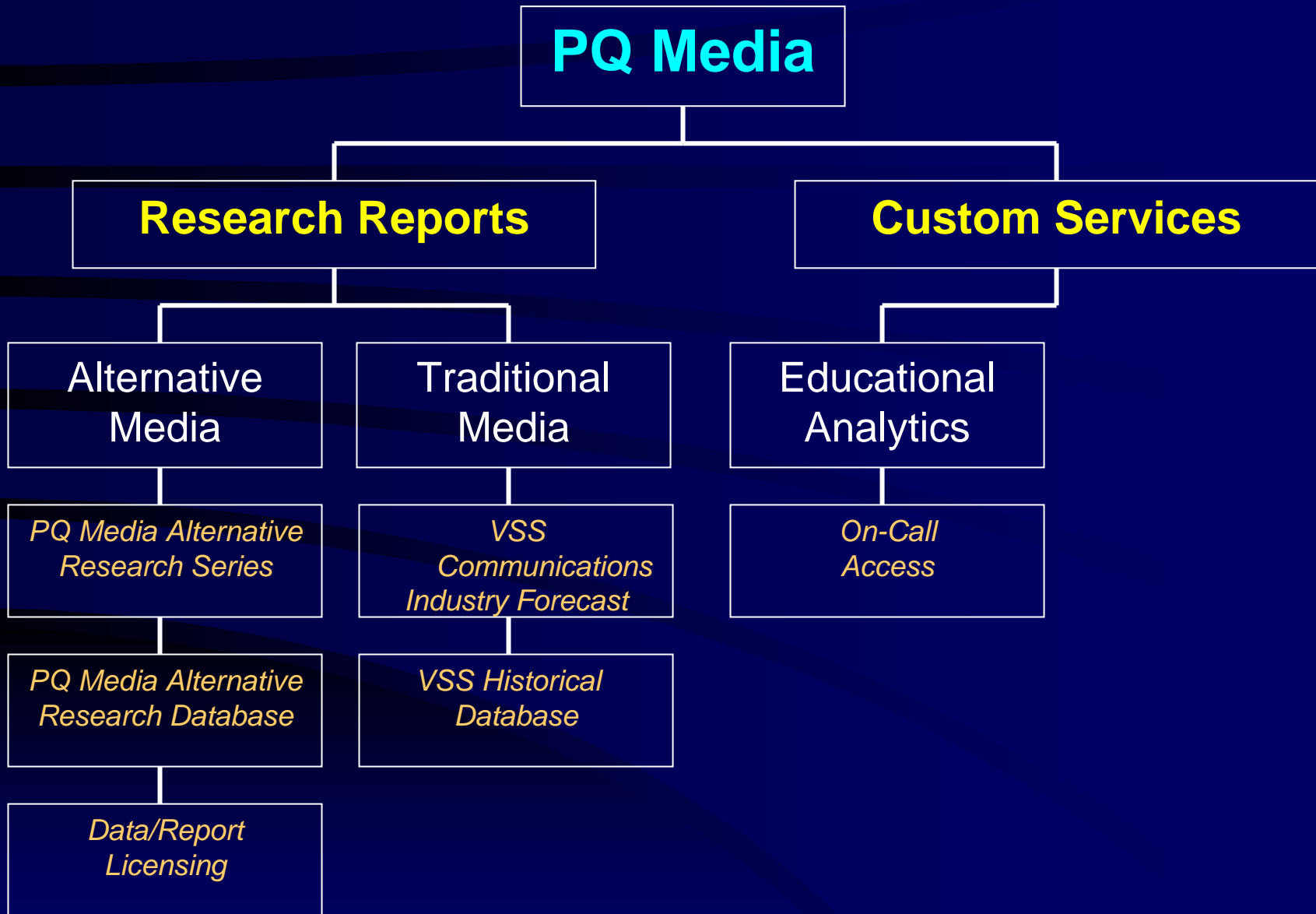
VSS Communications Historical Database

Communications vs. Nominal GDP During Economic Cycles



Sources: Veronis Suhler Stevenson, PQ Media, Bureau of Economic Analysis, National Bureau of Economic Research

PQ Media's Services



On-Call (Phone/WebEx) Access

Advergaming

Ambient OOH

B2B E-Media

B2B Magazines

B2B Promotions

B2C E-Media

B2C Promotions

Blog Ads

Broadcast Networks

Broadcast Stations

Cable Networks

Catalogs

Cinema Ads

Consumer Magazines

Daily Newspapers

DBS Avails

Digital Billboards

Direct Mail

Direct Response TV

DVR Marketing

E-Custom Pubs

E-Direct Marketing

Event Marketing

Event Sponsorships

Free Standing Inserts

Home Video Ads

In-App & Proximity

In-Store Coupons

Interactive TV

Internet YPG

List Management

Local Cable Ads

Local Magazines

Mobile Coupon

Mobile Magazines

Mobile Newspapers

Mobile Search

Mobile TV

Mobile Videogames

Online Classifieds

Online Coupons

Online Display

Online Newspapers

Online Radio

Online TV

Online Videogames

Podcast Ads

Print Custom Pubs

Product Placement

Product Sampling

Public Relations

Radio Networks

Radio Stations

Regional Cable Nets

Satellite Radio

Search Engine

SMS/MMS Text Ads

Social Networks

Static Billboards

Street Furniture

Telesales

Trade Show Promos

Transit OOH

User-Generated

Video Ad Networks

Videogame Ads

VOD Marketing

Webisodes

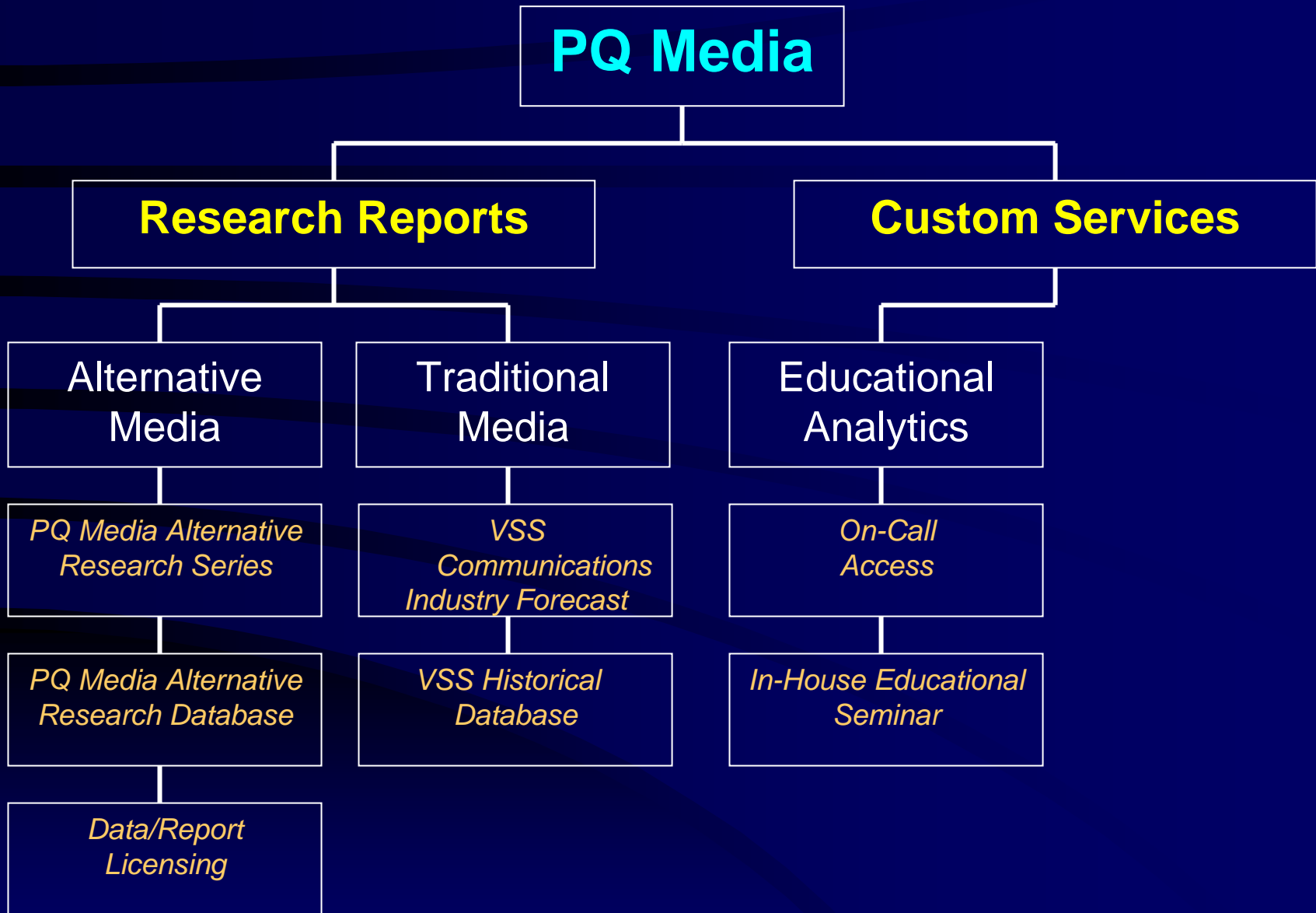
Weekly Newspapers

Widget Ads

Word-of-Mouth

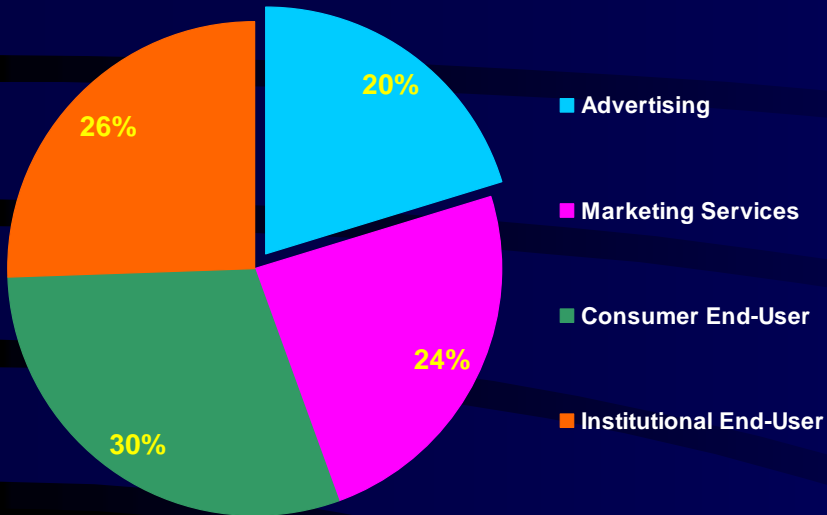
Yellow Pages

PQ Media's Services



In-House or WebEx Presentation

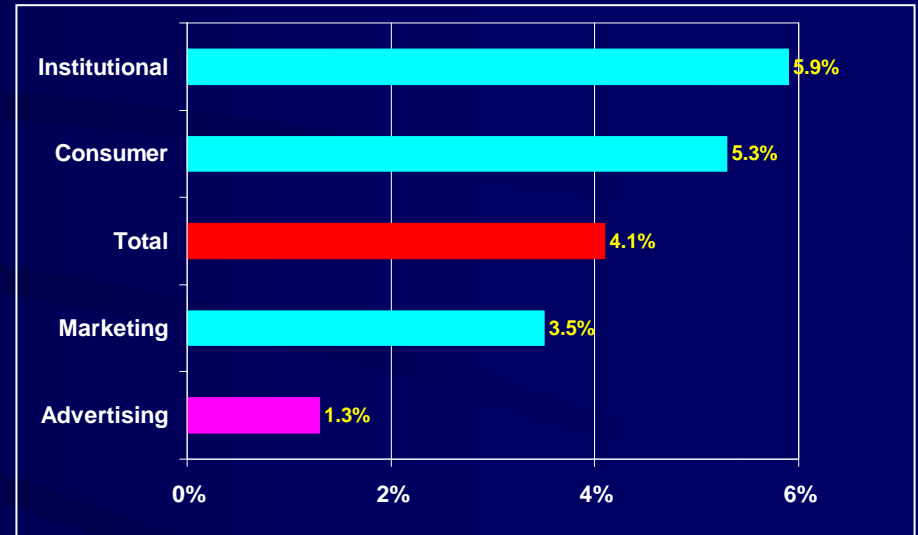
Share of Global Media Spending by Sector



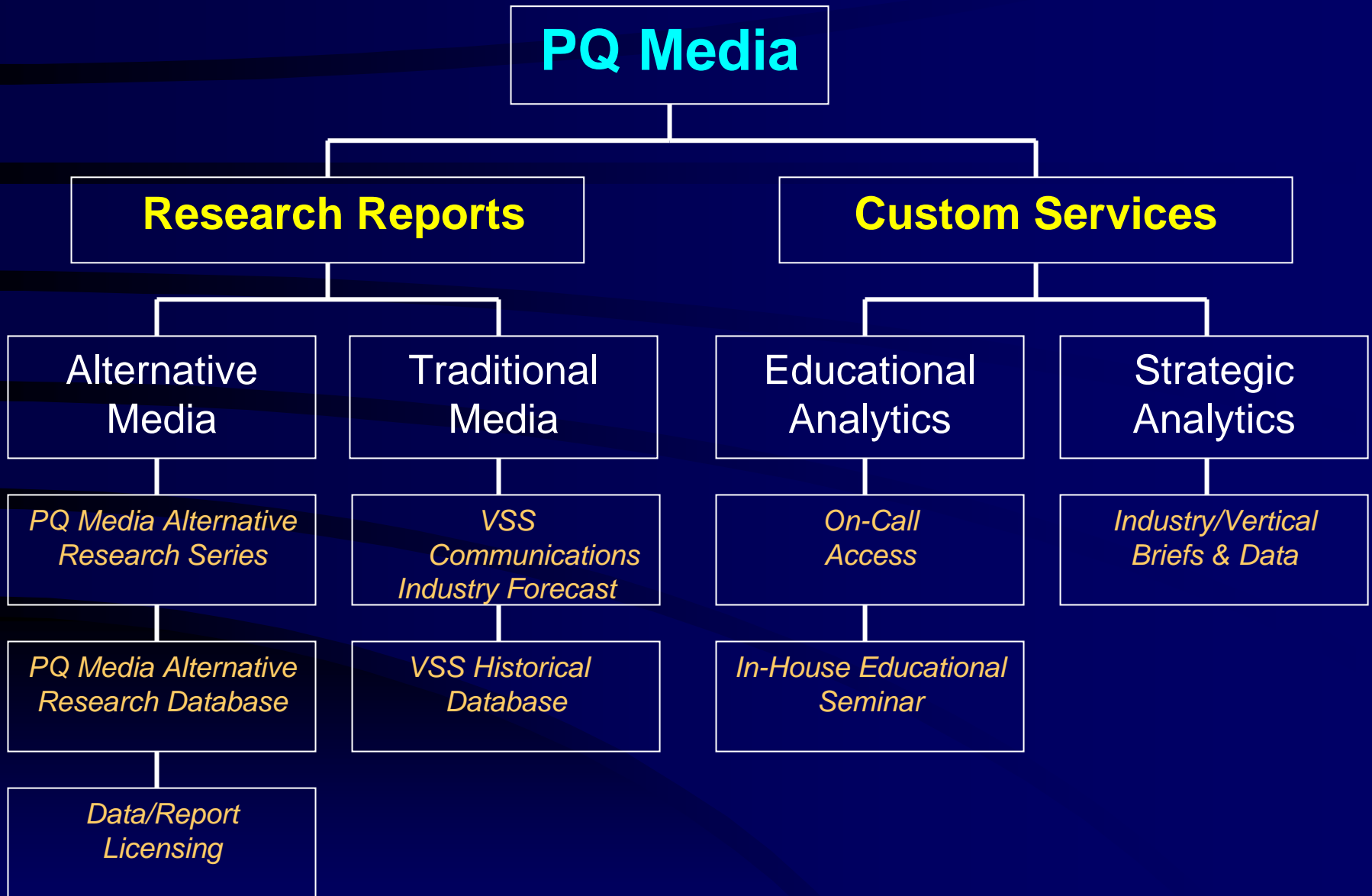
**Total = \$2.24 Trillion
(2009 Estimate)**

Source: PQ Media

Global Media CAGRs: 2004-2009

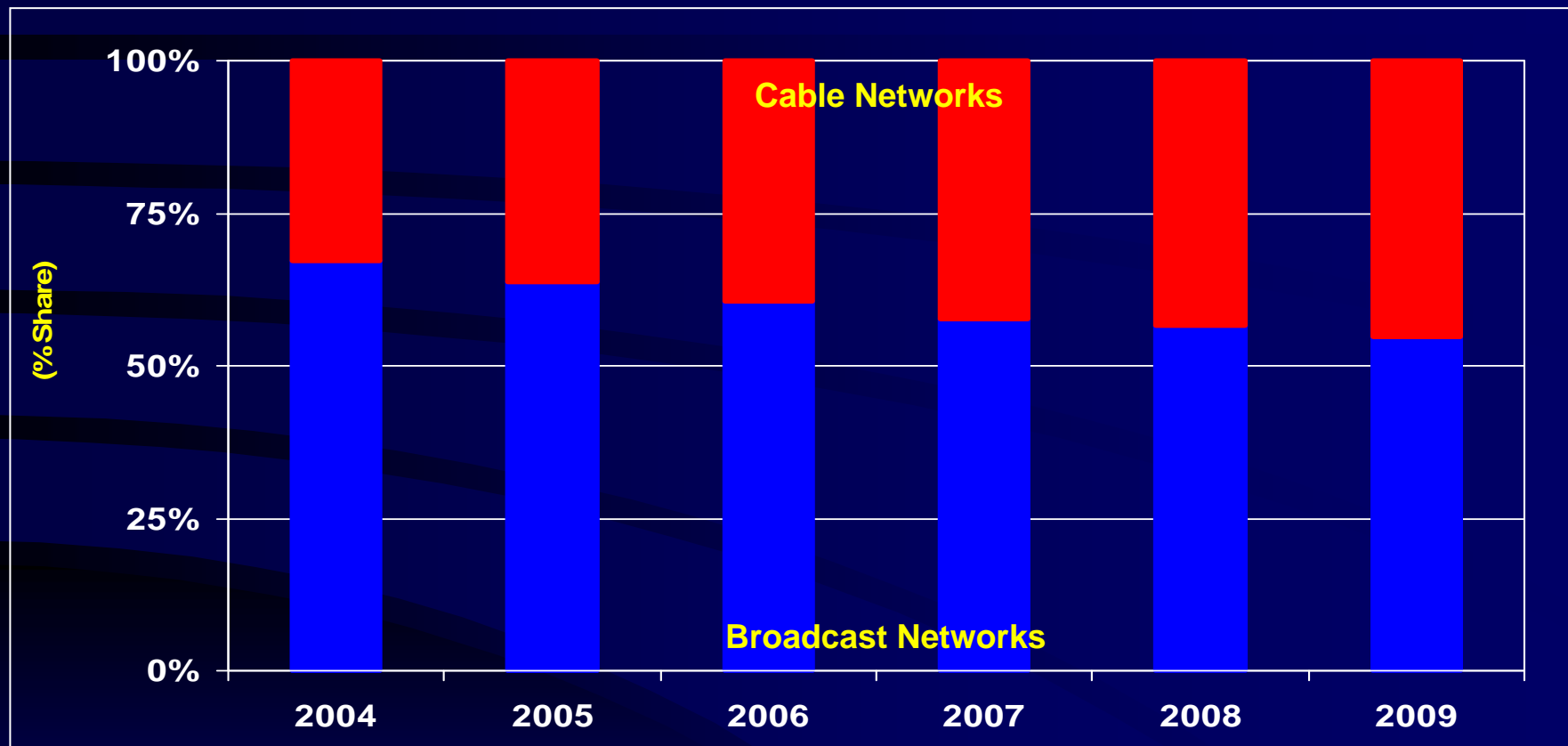


PQ Media's Services



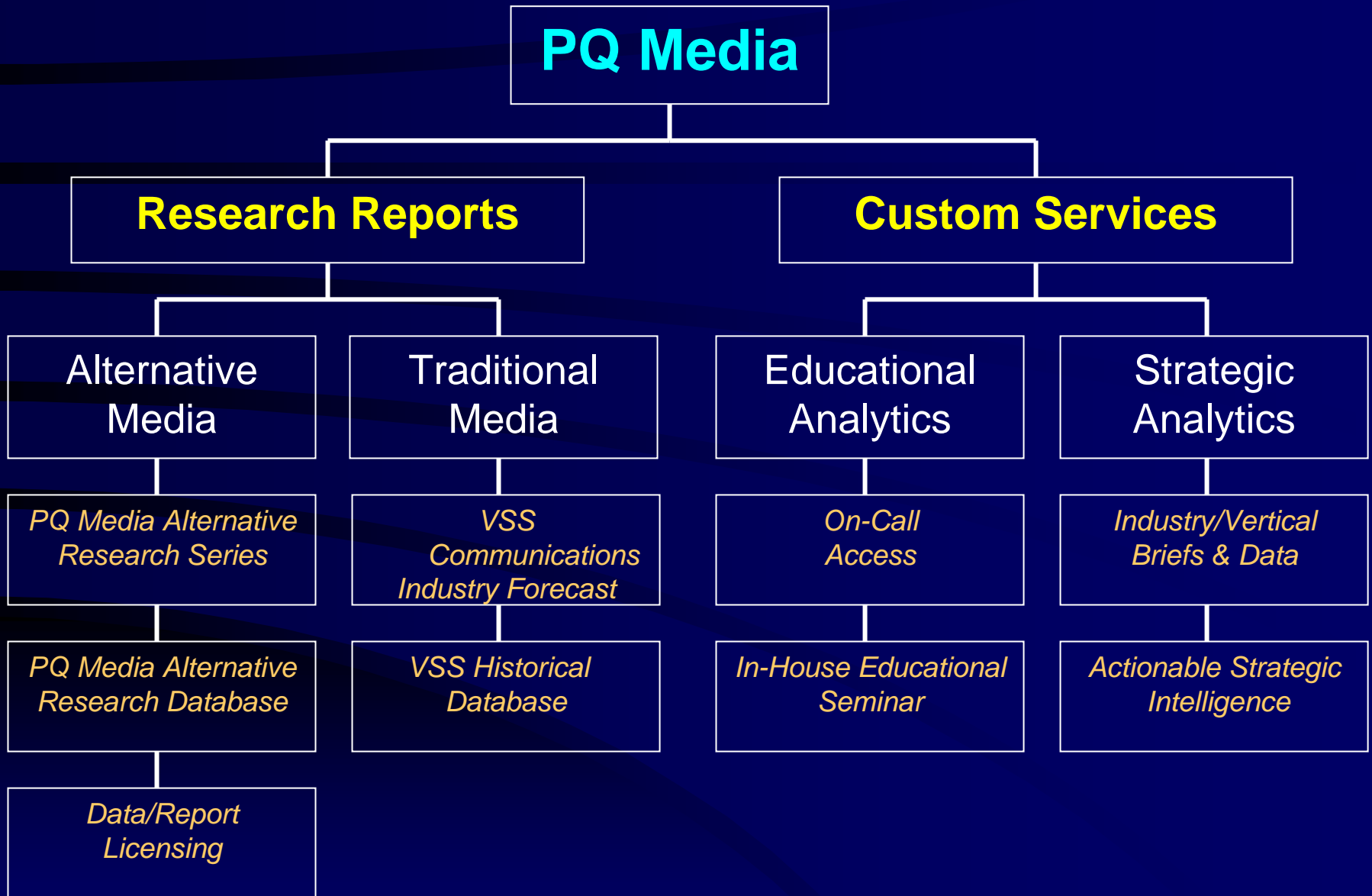
Industry & Vertical Briefs & Data Drill Downs

Share of Prime Time Advertising on Television



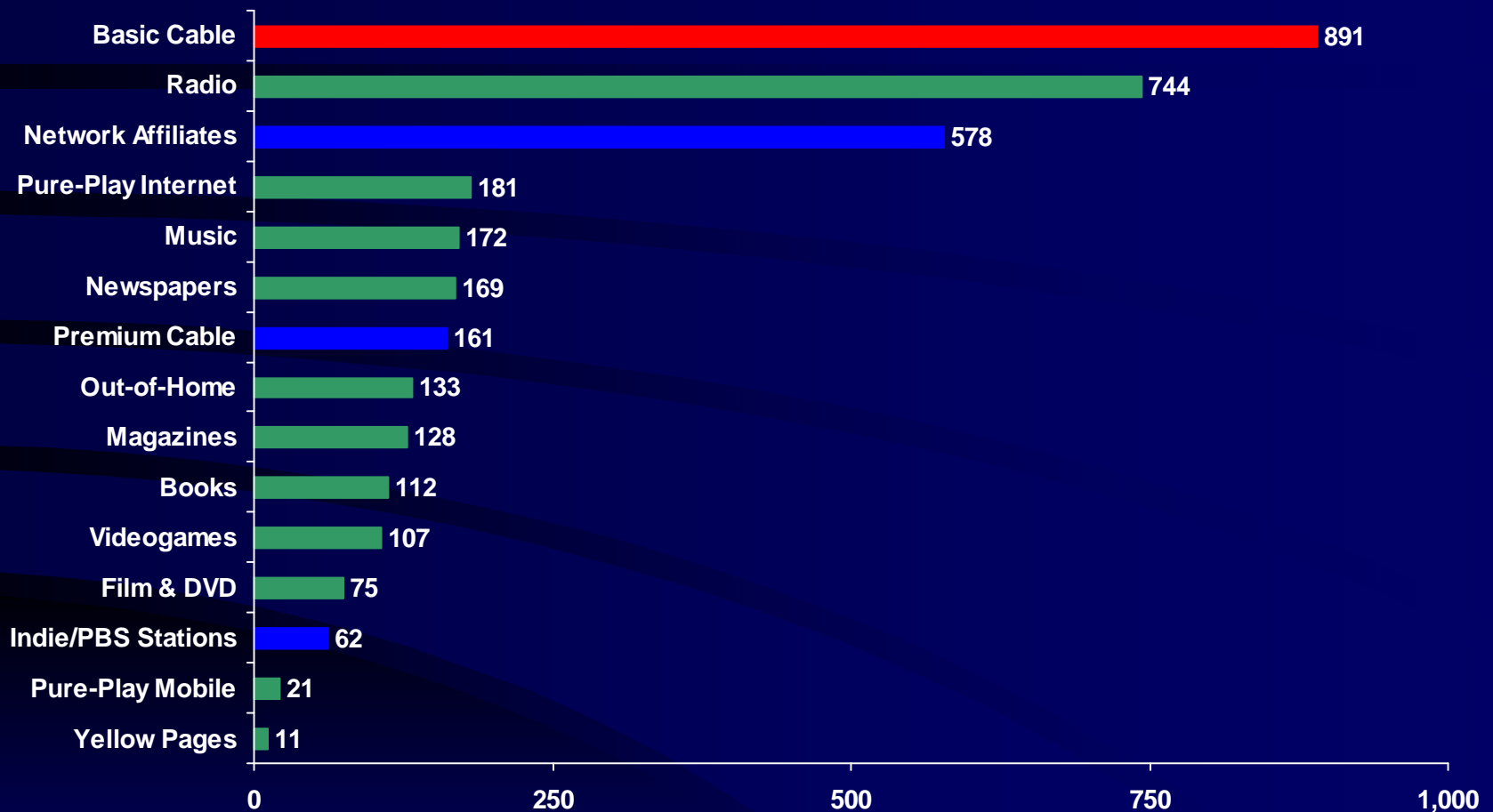
Source: PQ Media

PQ Media's Services



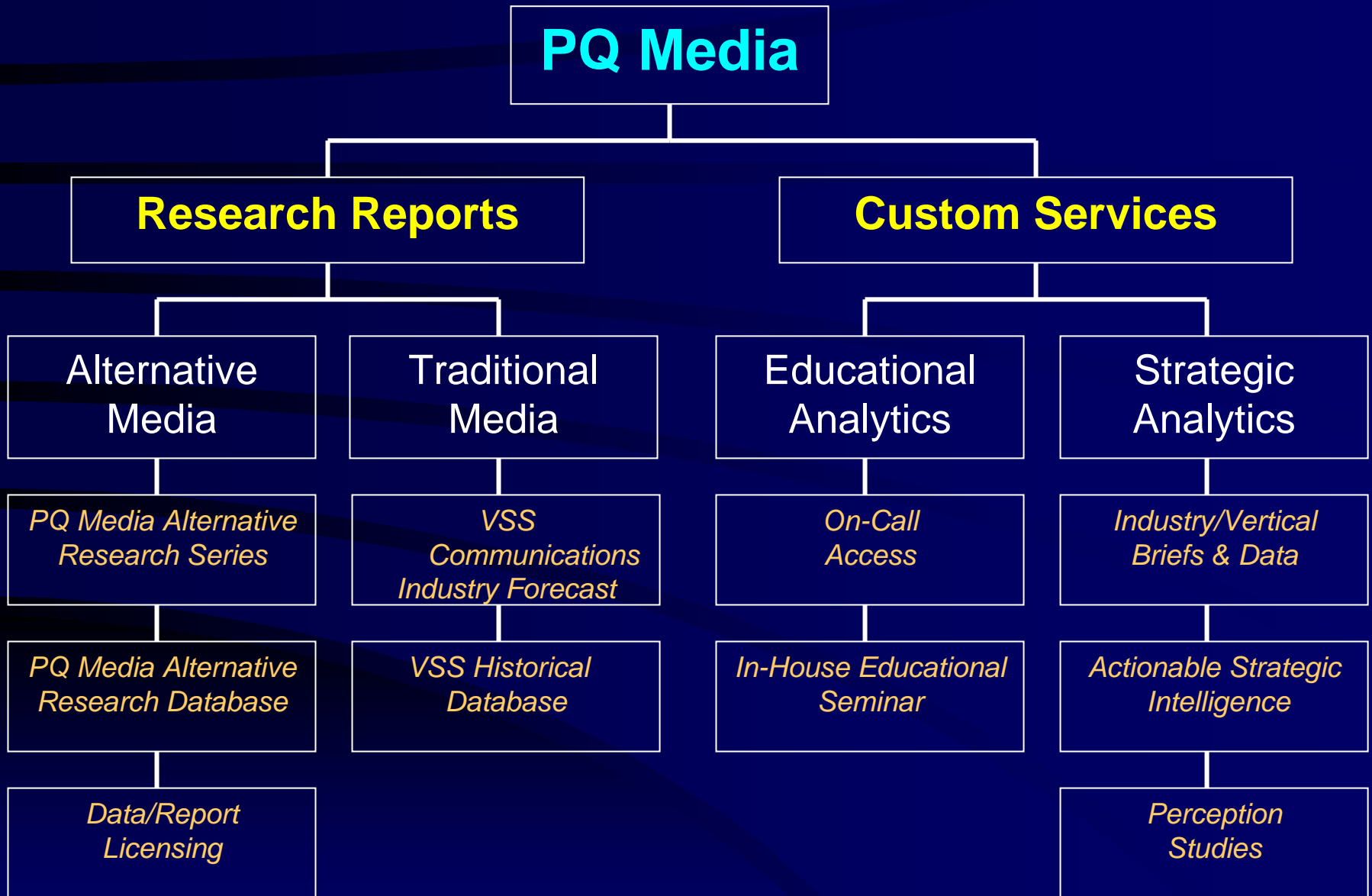
Actionable Strategic Intelligence

Time Spent with Media – Hours Per Person Per Year



Sources: Veronis Suhler Stevenson, PQ Media

PQ Media's Services



Phone or Intercept Perception Surveys

BRANDS & AGENCIES - MEASURING CAMPAIGN SUCCESS	% Share
Branding	38%
Sales Lift	30%
Drive to Web	26%
Buzz/Awareness/Client or Consumer Comment	20%
Point-of-Purchase/Sales Traffic	12%
Impressions	10%
Engagement	8%
Other (ROI, Recall, Awards, Fit for Client)	18%

Source: PQ Media