

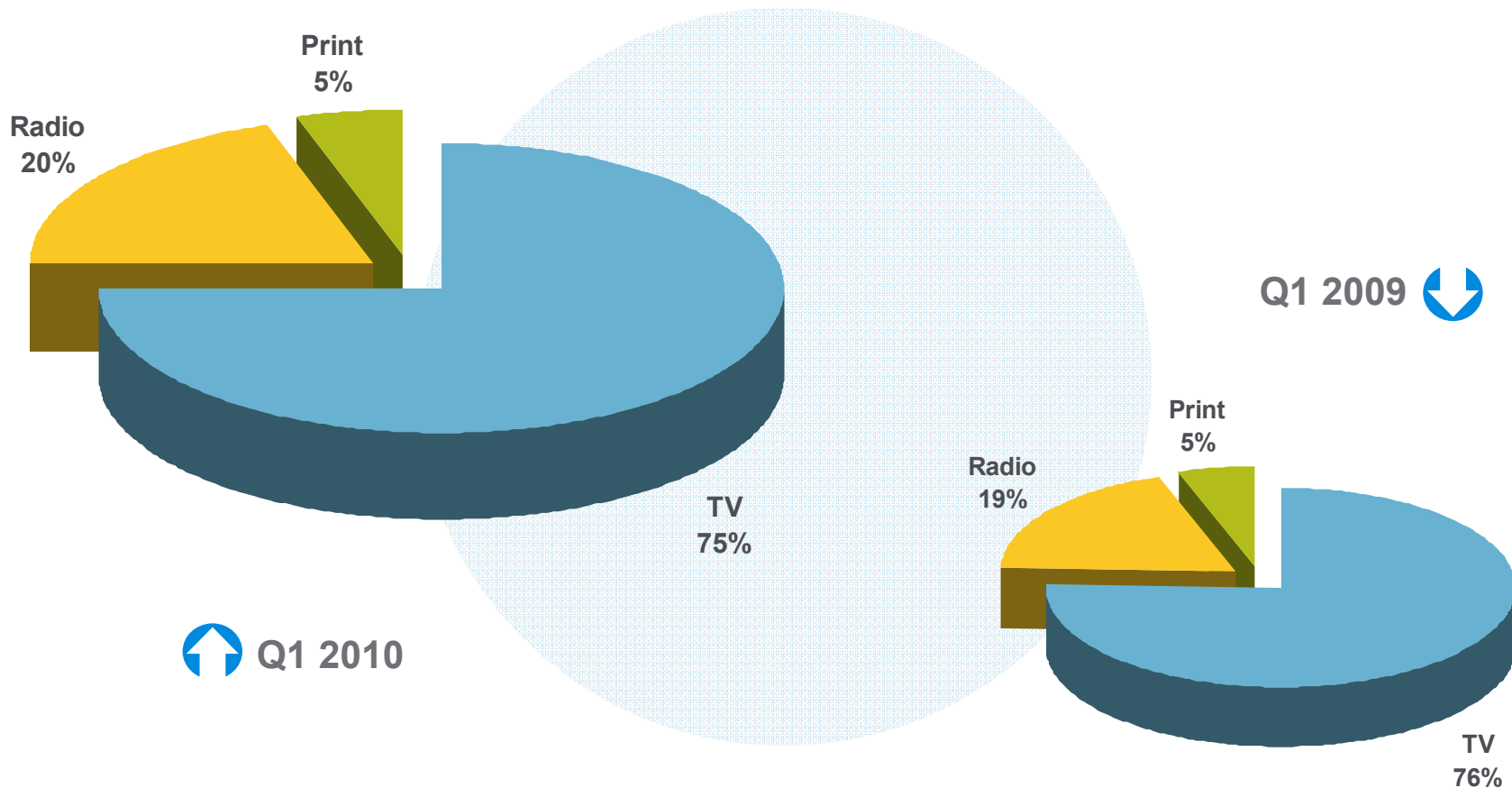
# Media Spend Highlights

1<sup>st</sup> Quarter 2010



# Share of Media Spend

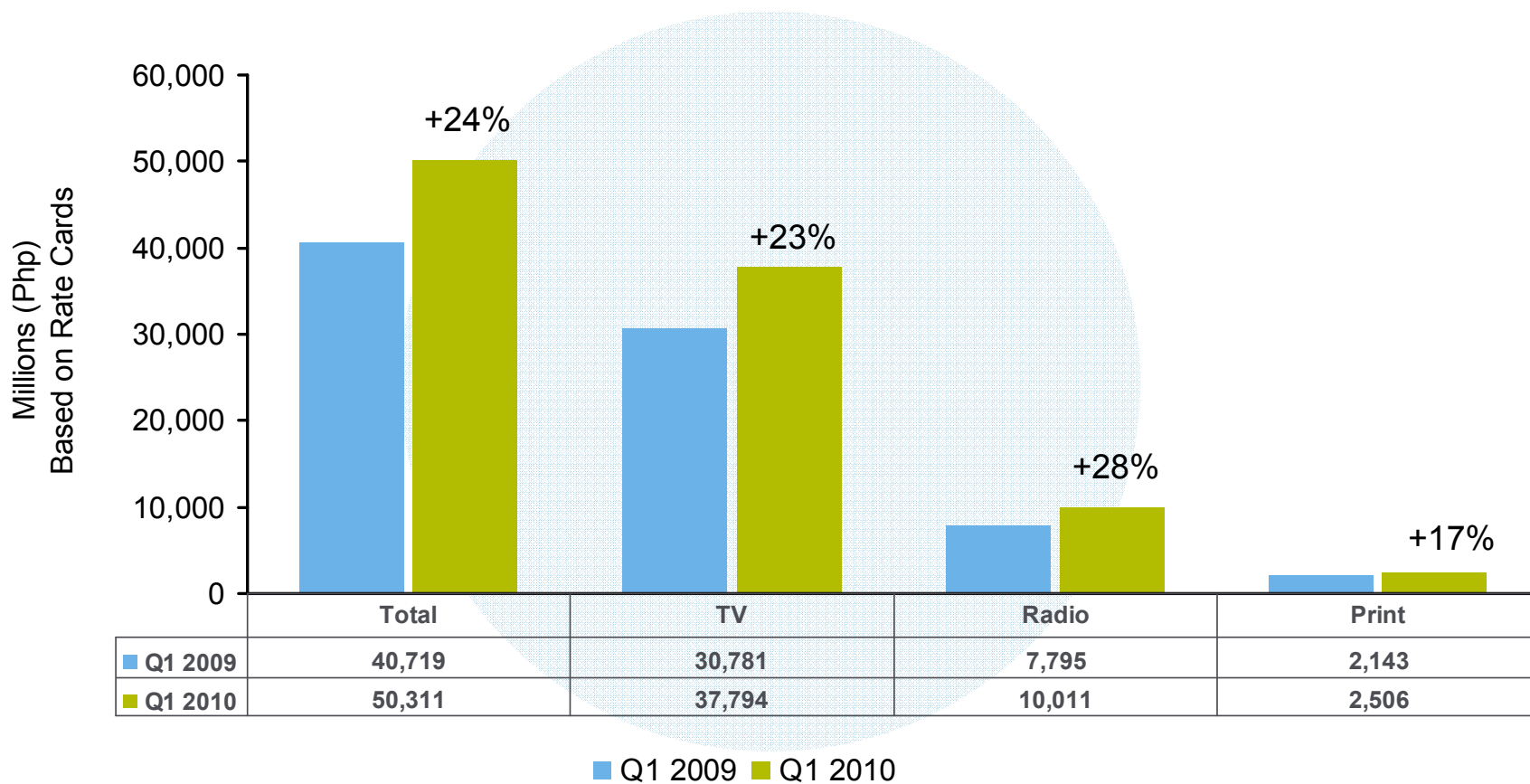
Q1 2010 versus Year Ago



Source: Nielsen Advertising Information Services

# Total Media Spend Based on Rate Cards

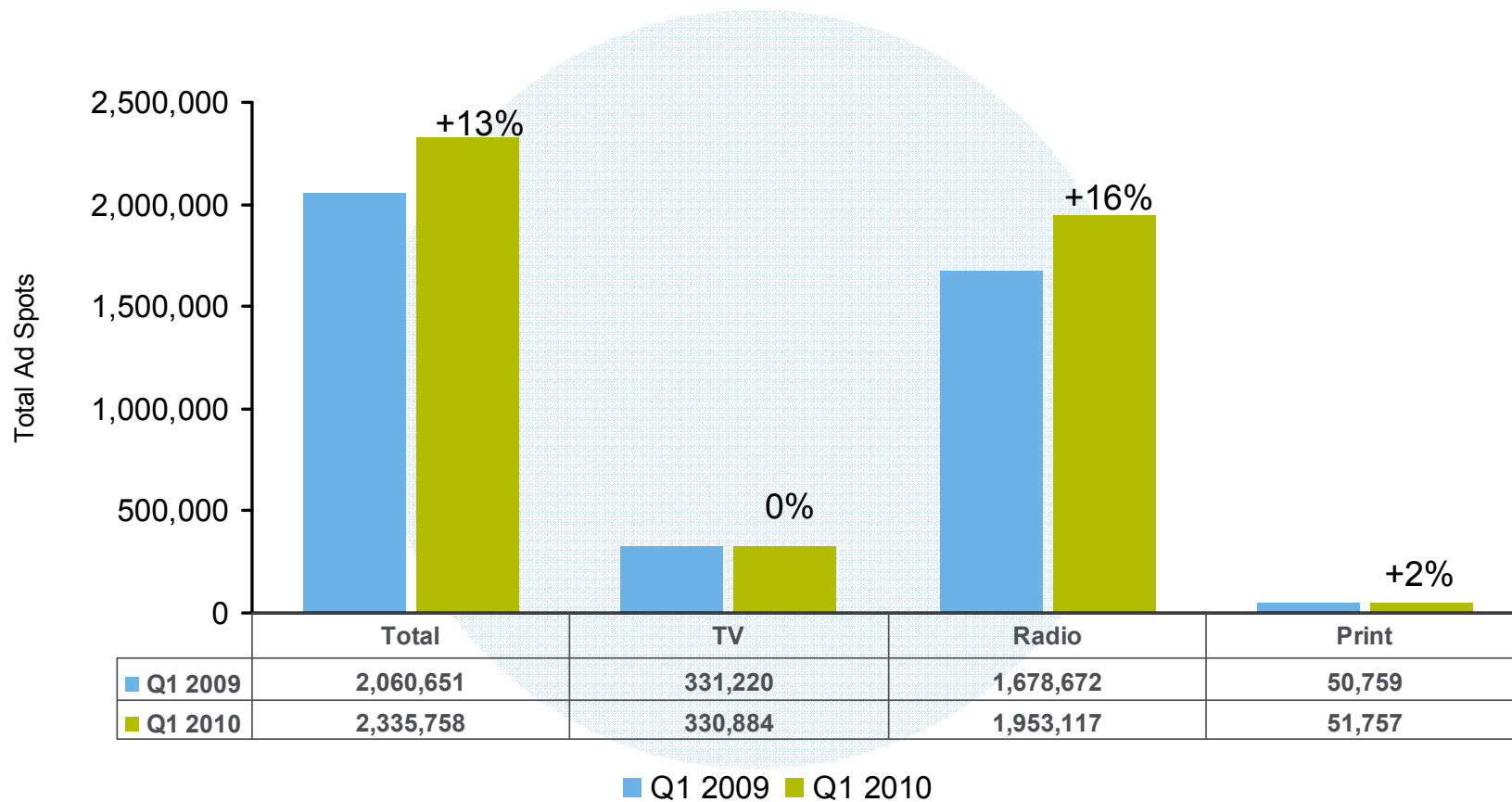
Q1 2010 versus Year Ago



Source: Nielsen Advertising Information Services

# Total Advertising Spots

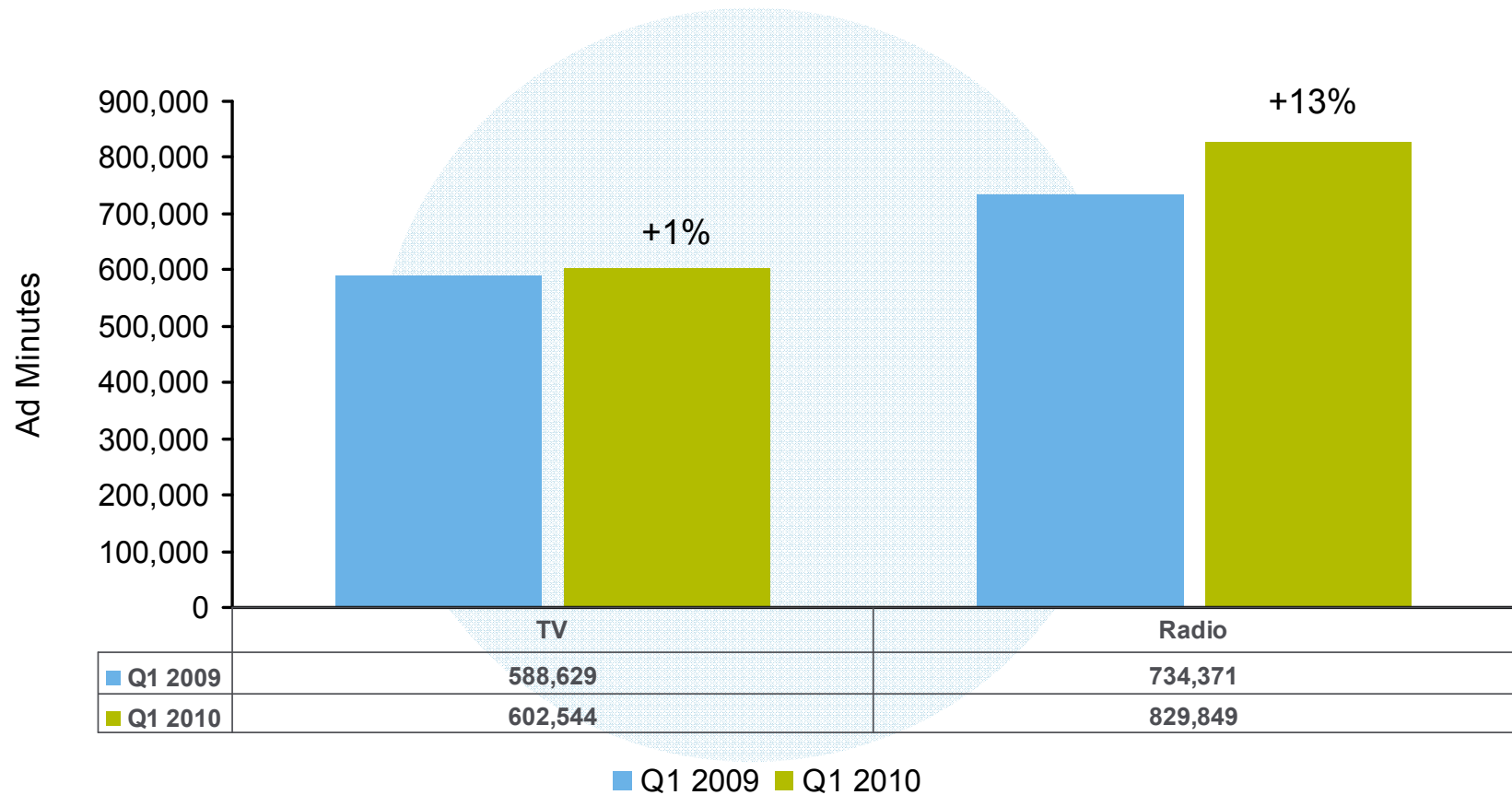
Q1 2010 versus Year Ago



Source: Nielsen Advertising Information Services

# Advertising Minutes

## Q1 2010 versus Year Ago



Source: Nielsen Advertising Information Services

# Top 20 Categories Based on Rate Cards

Q1 2010 versus Year Ago

AdSpend in Millions (Php)				
Rank	Categories	Q1 2010	Q1 2009	%Change
1	Government Agencies & Public Utilities	6,523	1,778	267%
2	Hair Shampoos,Rinses,T'Ment/Hairdressing Prod	4,544	3,498	30%
3	Communication/Telecommunication	3,091	2,750	12%
4	Detergents & Laundry Preparations	2,624	1,682	56%
5	Dentifrices, Mouthwash & Toothbrush	2,120	1,244	70%
6	Cough & Cold Remedies	1,918	1,954	-2%
7	Proprietary Drugs/Other Than Vitamins &Tonics	1,868	1,916	-2%
8	Other Food Prod./Other Than Biscuits&Bakeshop	1,830	1,876	-2%
9	Powder Milk	1,733	1,837	-6%
10	Skin Care	1,378	1,280	8%

In Million Pesos based on Ratecard costs

Source: Nielsen Advertising Information Services

# Top 20 Categories Based on Rate Cards

Q1 2010 versus Year Ago

AdSpend in Millions (Php)				
Rank	Categories	Q1 2010	Q1 2009	%Change
11	Vitamins	1,361	1,260	8%
12	Entertainment	1,336	1,686	-21%
13	Ice Cream, Sherbets & Frozen Delights	1,206	349	246%
14	Flour, Bakery Products & Bakeshops	1,019	758	34%
15	Seasonings, Sauces & Extracts	937	889	5%
16	Coffee & Tea	934	1,078	-13%
17	Health & Beauty Soaps	784	630	25%
18	Soups & Noodles	737	630	17%
19	Banks, Finance Companies & Investment Houses	733	565	30%
20	Business Machines & Office Equipments	692	384	80%

In Million Pesos based on Ratecard costs

Source: Nielsen Advertising Information Services

# Top 20 Advertisers Based on Rate Cards

## Q1 2010 versus Year Ago

AdSpend in Millions (Php)				
Rank	Advertisers	Q1 2010	Q1 2009	%Change
1	UNILEVER PHILIPPINES, INC.	5,878	3,994	47%
2	PROCTER & GAMBLE PHILS., INC.	4,166	3,319	25%
3	UNITED LABORATORIES, INC.	3,073	2,569	20%
4	COLGATE-PALMOLIVE PHILIPPINES, INC.	2,680	1,485	81%
5	NESTLE' PHILIPPINES, INC.	2,664	2,849	-7%
6	MANNY VILLAR	1,230	18	6575%
7	JOLLIBEE FOODS CORPORATION	759	777	-2%
8	UNIVERSAL ROBINA CORPORATION	738	704	5%
9	MONDE NISSIN CORPORATION	698	518	35%
10	GLOBE TELECOM, INC.	561	471	19%

In Million Pesos based on Ratecard costs

Source: Nielsen Advertising Information Services

# Top 20 Advertisers Based on Rate Cards

## Q1 2010 versus Year Ago

AdSpend in Millions (Php)				
Rank	Advertisers	Q1 2010	Q1 2009	%Change
11	NOYNOY AQUINO	526	0	-
12	JOHNSON & JOHNSON PHILS., INC.	505	546	-7%
13	WYETH PHILIPPINES, INC.	496	600	-17%
14	SMART COMMUNICATIONS, INC.	487	515	-5%
15	KRAFT FOODS (PHILIPPINES), INC.	467	290	61%
16	THE COCA-COLA EXPORT COMPANY	462	689	-33%
17	PHILIPPINE LONG DISTANCE TELEPHONE COMPANY	445	136	228%
18	TANDUAY DISTILLERS, INC.	440	346	27%
19	ASIA BREWERY, INC.	414	180	130%
20	MEAD JOHNSON PHILIPPINES, INC.	393	637	-38%

In Million Pesos based on Ratecard costs

Source: Nielsen Advertising Information Services

Tri-Media (TV/Radio/Print) Brand Advertising Expenditure  
 Social Concerns + Political Ads in Million Pesos  
 Presidential Candidates  
 Based on Published Rate Cards

AdSpend in Millions (Php)				
Rank	Brand	Q4 2009	Q1 2010	% Change
1	MANNY VILLAR	543	1,230	127%
2	NOYNOY AQUINO	143	526	269%
3	JOSEPH ESTRADA	70	165	137%
4	RICHARD GORDON	82	238	190%
5	GILBERT TEODORO	196	352	79%
6	EDDIE VILLANUEVA	52	65	26%

In Million Pesos based on Ratecard costs

Source: Nielsen Advertising Information Services

Tri-Media (TV/Radio/Print) Brand Advertising Expenditure  
 Political Ads in Million Pesos  
 Presidential Candidates  
 Based on Rate Cards Less 30%

AdSpend in Millions (Php)			
Rank	Brand	February 9 to March 31, 2010	
1	MANNY VILLAR	227,940,382	
2	NOYNOY AQUINO	161,407,904	
3	JOSEPH ESTRADA	76,886,685	
4	RICHARD GORDON	47,560,690	
5	GILBERT TEODORO	18,206,094	
6	EDDIE VILLANUEVA	4,715,111	

In Million Pesos based on Ratecard costs

Source: Nielsen Advertising Information Services

Total TV Ad Minutes  
 ABSCBN & GMA  
 February 9 to March 31, 2010

PRESIDENTIABLES				
Brand	ABS-CBN 2		GMA 7	
	By Brand Level	"Paid For" Level	By Brand Level	"Paid For" Level
MANNY VILLAR	134.25	50.75	143.25	60.25
NOYNOY AQUINO	133	118.5	121	116.5
JOSEPH ESTRADA	77.5	77.5	65	65
RICHARD GORDON	52	52	43	43
GILBERT TEODORO	17	0	11	0
EDDIE VILLANUEVA	8	4.5	2	6

Source: Nielsen Advertising Information Services

Thank You.

