



Ipsos-ASI

The Advertising Research Company

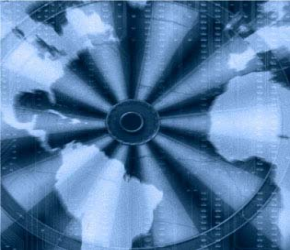


And the Oscar for Advertising Goes to ...

**But is an Ad During the Oscars
Really Worth It?**

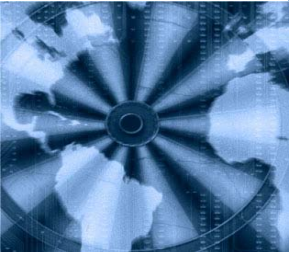
March 2, 2004

Background



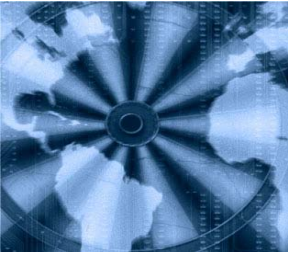
- Ipsos-ASI conducted research with adult male and female viewers to determine if the Oscars is an effective advertising medium to attract consumers.
- The Oscars is considered the second largest media event for advertisers, behind the Super Bowl, and has been dubbed “The Super Bowl for Women”.
- This year, national advertisers reportedly paid US\$1.5 million per 30 second advertisement.

Summary Results



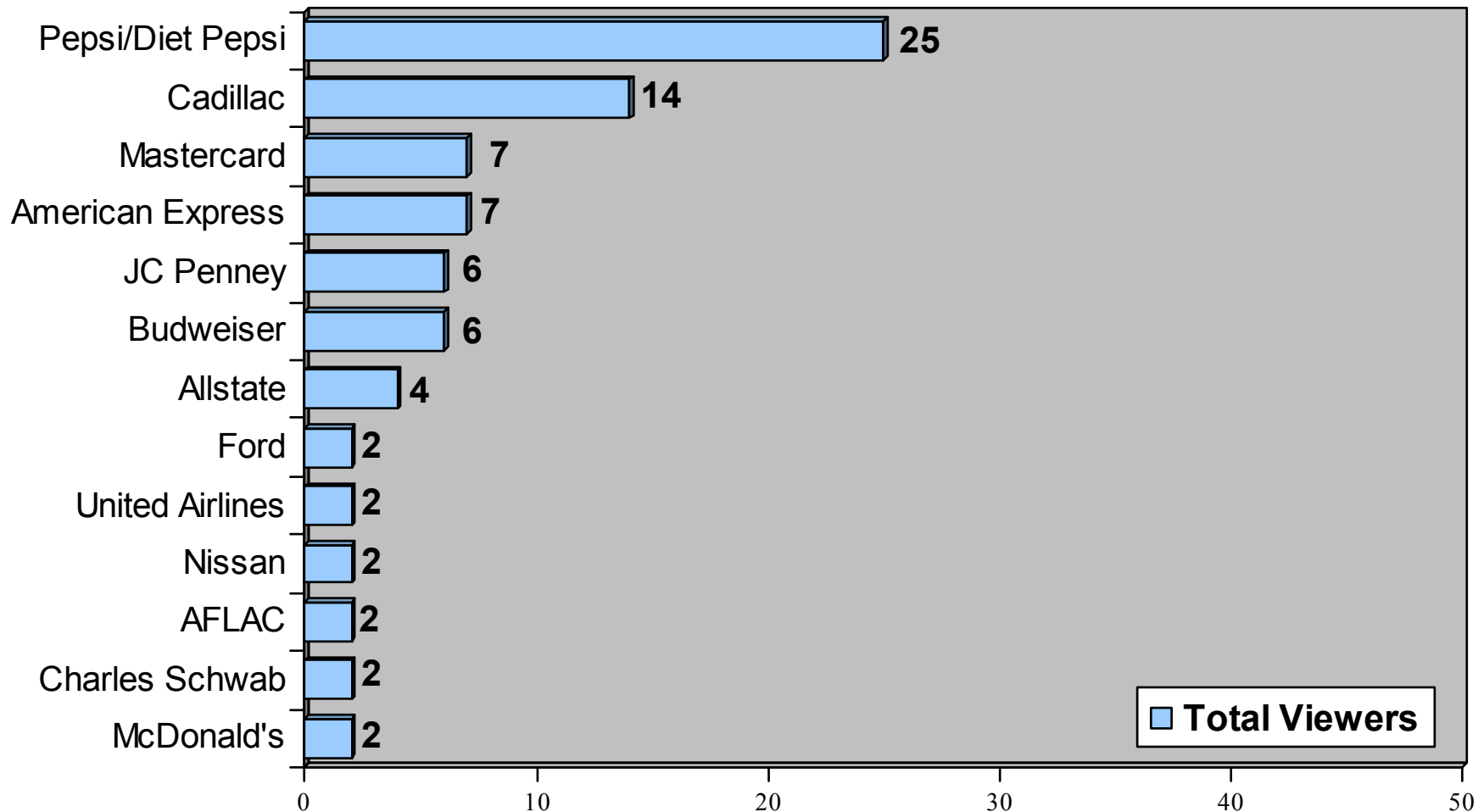
- **Oscar viewership increased in 2004 with an estimated 42.5 million tuning in to the broadcast on February 29.**
- **For the second year in a row, Pepsi is the big winner with one in four viewers remembering ads for Pepsi or Diet Pepsi during the 2004 Oscars telecast. Cadillac ads were remembered by 14% of viewers. These two marketers aired a total of 16 ads (9 for Cadillac, 7 for Pepsi Products), suggesting that unlike the Super Bowl, one “big” ad isn’t enough to leave a strong impression.**

Summary Results

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- **While the Oscars may be considered the “Super Bowl for Women”, viewing behavior is quite different from that mega-event:**
 - Men who watched this year’s Super Bowl remembered an average of 3.5 of the ads that were shown during the game. During the 2004 Oscars, viewers remember just over two.
 - And, those who watch the Oscars are much more likely to switch channels during the commercials than those watching the Super Bowl (50% versus 25% for the Super Bowl).
 - Almost two-thirds watched the entire Super Bowl, compared to just under half of viewers watching the entire Oscars broadcast.
 - Three of five men watched the Super Bowl at a party, whereas Oscar watching tends to occur in smaller groups at home either alone or with one other person.

2004 Oscars

Advertisers Most Well Remembered



2004 Oscars

Advertisers Most Well Remembered

	Total	Males	Females
<i>Base - Total Respondents</i>	<i>297</i>	<i>118</i>	<i>179</i>
Pepsi/Diet Pepsi	25	28	24
Cadillac	14	19	11
American Express	7	9	6
Mastercard	7	7	8
Budweiser	6	8	4
JC Penney	6	4	7
Allstate	4	6	2
Aflac	2	3	2
United Airlines	2	3	2
Ford	2	3	1
McDonald's	2	2	3
Charles Schwab	2	2	3
Nissan	2	1	3
Mercedes	1	-	2
Toyota	1	-	2
AOL	1	2	1
Lays Stax	1	1	2
Home Depot	1	1	1
Motorola	1	1	1
Honda	1	1	1



Number of Advertisers Remembered

Viewers remembered an average of 2.2 ads from the Oscars telecast which is up from 2003; however this is well below the 3.5 ads remembered from this year's Super Bowl

	Total		Males		Females	
	2004	2003	2004	2003	2004	2003
Average Number of Ads Played Back Correctly	2.21	1.86	2.03	2.06	2.36	1.77
Respondents who Could Correctly Name One or More Ad	42%	37%	50%	29%	37%	41%

2004 Super Bowl:

3.55 was average # ads played back

89% of respondents naming one or more ad



Commercial Attention

For commercials during the <hour>, did you watch...?

Viewers aren't as likely to watch all the commercials in a given time frame as they are for the Super Bowl.

Respondents who watched "all of the commercials" during the named hour	Total		Males		Females	
	2004	2003	2004	2003	2004	2003
First Hour	16%	15%	21%	17%	12%	13%
Second Hour	12	11	17	14	8	10
Third Hour	14	14	17	23	12	9
Fourth Hour	16	15	23	18	12	13

2004 Super Bowl:

46% of respondents said they watched
All of the commercials for the entire game



Commercial Attention

What did you do when the commercials came on?

Here we see that viewers were more likely to switch channels during the commercials at the Oscars than they were for the Super Bowl.

	Total		Males		Females	
	2004	2003	2004	2003	2004	2003
Switch channels during the commercial break to see another channel or show	50	60	54	66	47	56
Stay in the room in which the TV is located, but did something else while the commercials were on	82	77	81	77	82	76
Leave the room in which the TV is located for any period of time while the commercials were on	79	73	70	68	84	76
Watch the commercials	69	66	68	67	69	66

2004 Super Bowl:

28% of respondents switched channels

73% of respondents watched the commercials



Viewing Behavior

How much of the show did you watch?

Viewing behavior is very different for the Oscars, as only 49% of respondents claim to watch the entire telecast.

	Total		Males		Females	
	2004	2003	2004	2003	2004	2003
First Hour	22%	28%	23%	28%	21%	28%
Second Hour	24	24	26	19	22	27
Third Hour	20	24	19	23	21	24
Fourth Hour	18	17	21	16	16	18
Watched Whole Show	49	46	47	44	51	47

2004 Super Bowl:

65% of respondents said they
Watched the entire game



Viewing Behavior

How often do you watch award shows?

Not surprisingly, the people who watch the Oscars are likely to watch other types of award shows.

	Total		Males		Females	
	2004	2003	2004	2003	2004	2003
Often	53%	45%	46%	42%	58%	47%
Occasionally	37	45	44	46	32	45
Not very often	10	9	10	12	9	7



Viewing Behavior

Where did you watch the show?

Viewing behavior again is very different here as most people watch the Oscars from home.

	Total		Males		Females	
	2004	2003	2004	2003	2004	2003
In your home	92%	93%	92%	94%	93%	92%
In someone else's home	7	6	7	5	7	6
In a public location such as a club, bar or airport	1	2	2	2	1	2

2004 Super Bowl:

74% watched in their homes

24% watched at someone else's home

5% watched in a public location



Viewing Behavior

How many other people watched with you?

Reflective of watching the Oscars from home, most people watch the Oscars alone or with one other person.

	Total		Males		Females	
	2004	2003	2004	2003	2004	2003
Watched alone	29	29	27	28	30	30
Watched with one other person	45	47	47	46	45	48
Watched with 2-5 people	24	20	22	22	25	19
Watched with 6-10 people	1	1	1	2	1	1
Watched with 10 or more people	2	2	3	3	1	2

2004 Super Bowl:

12% watched alone

24% watched with one other

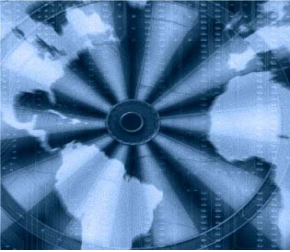
60% watched with two or more others

Methodology

- Ipsos-ASI conducted interviews via the Internet after the Oscars broadcast.
- Males and females, age 21-60.
- A total of 300 Oscar viewers were surveyed.



About Ipsos-ASI



- **Ipsos-ASI is the premier global provider of advertising research solutions for advertisers around the world with offices in 14 countries.**
- **Member of the Ipsos group of companies, the second largest survey-based research firm in the world.**
- **For more information, please email us at info@ipsos-asi.com**