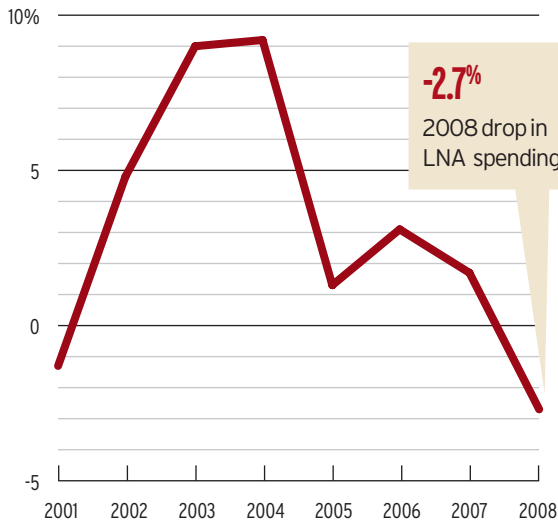


100 LEADING NATIONAL ADVERTISERS 2009

U.S. Ad Spend Trends: 2008

TOP MARKETERS TRIMMED SPENDING IN 2008 ...

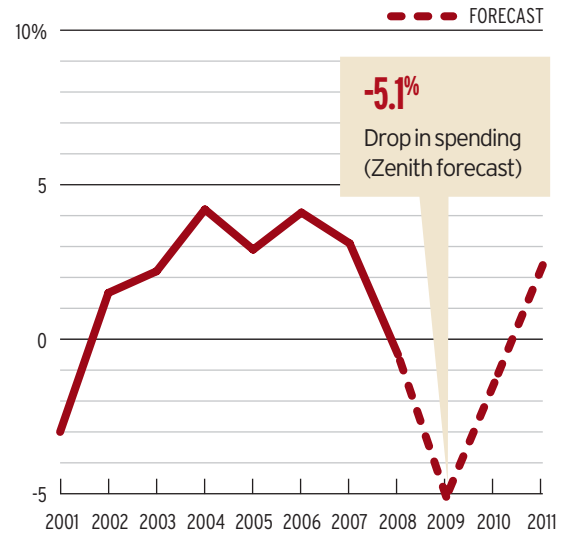
Percent change in ad spending for 100 LNA



Measured plus unmeasured spending. Source: Ad Age DataCenter (100 LNA reports)

... BUT 2009 IS SHAPING UP TO BE WORSE

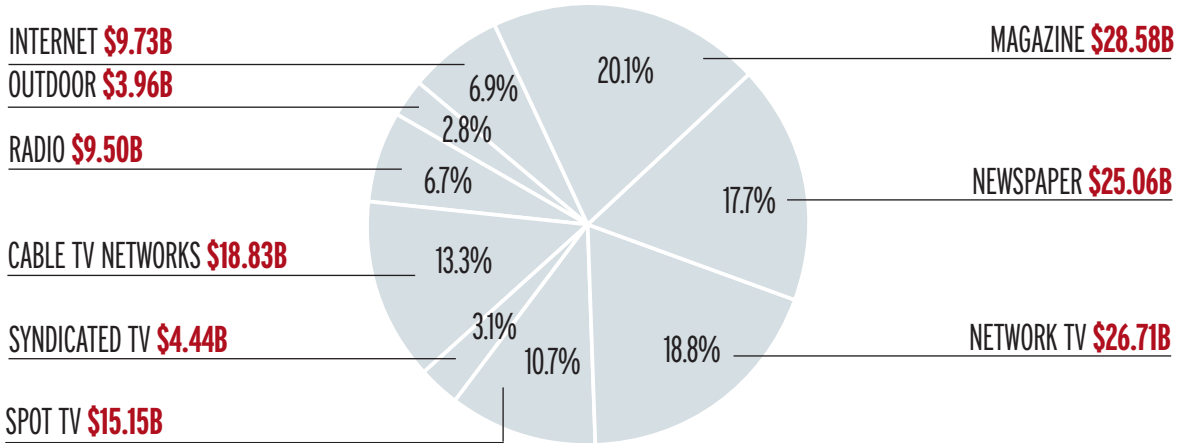
Change in U.S. ad spending (media plus marketing services)



2009, 2010 and 2011 are forecasts. More info: zenithoptimedia.com. Source: ZenithOptimedia Advertising Expenditure Forecasts (March 2009)

WHERE THE MONEY WENT

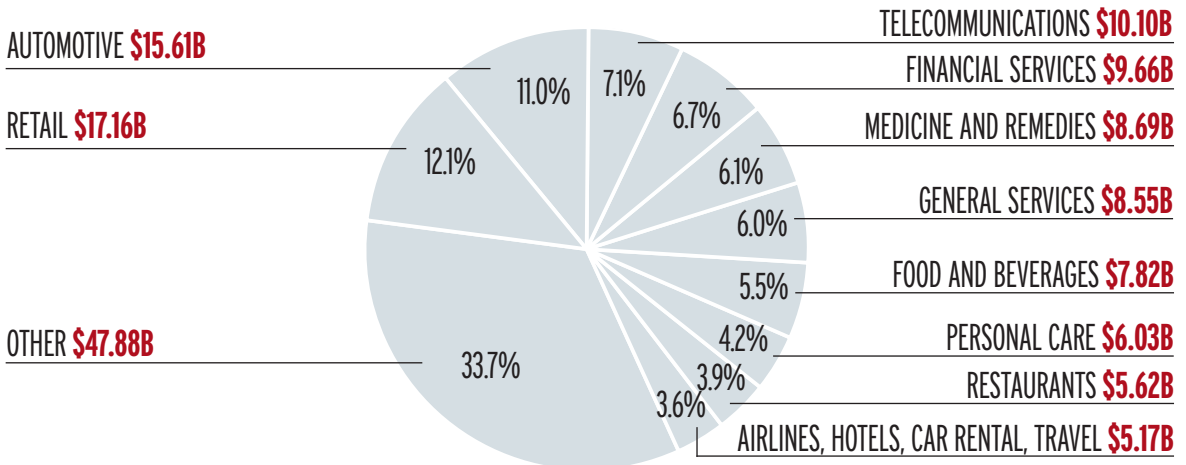
TNS 2008 U.S. measured media for all advertisers including LNA 100: \$142 billion.



Source: WPP's TNS Media Intelligence (www.tns-mi.com). Spending based on TNS's 18 measured media. Numbers rounded. Magazine includes consumer, Sunday, local, business-to-business and Spanish-language. Newspaper includes local, national and Spanish-language. Radio includes network, national spot and local. Internet is display advertising only (and so excludes paid search and broadband video). See "Total U.S. Advertising Spending by Medium" in AdAge.com/Ina09 for deeper data.

WHO SPENT THE MONEY

\$142 billion in U.S. measured media in 2008: Top 10 categories plus "other."



Source: WPP's TNS Media Intelligence (www.tns-mi.com). Spending based on TNS's 18 measured media. Numbers rounded. Categories are aggregated from TNS classifications by Ad Age DataCenter. See "Total U.S. Advertising Spending By Category" in AdAge.com/Ina09 for deeper data.



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