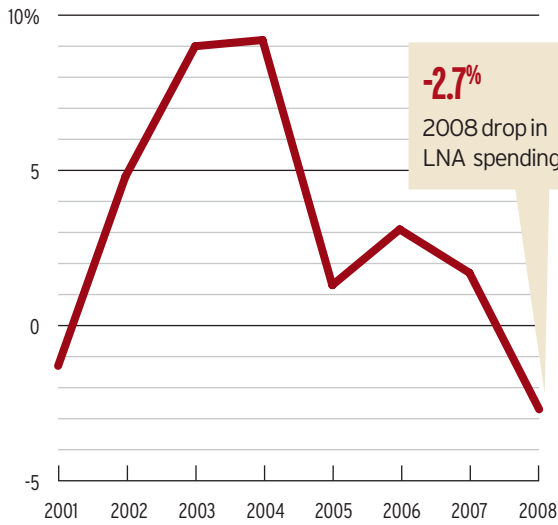


100 LEADING NATIONAL ADVERTISERS 2009

# U.S. Ad Spend Trends: 2008

**TOP MARKETERS TRIMMED SPENDING IN 2008 ...**

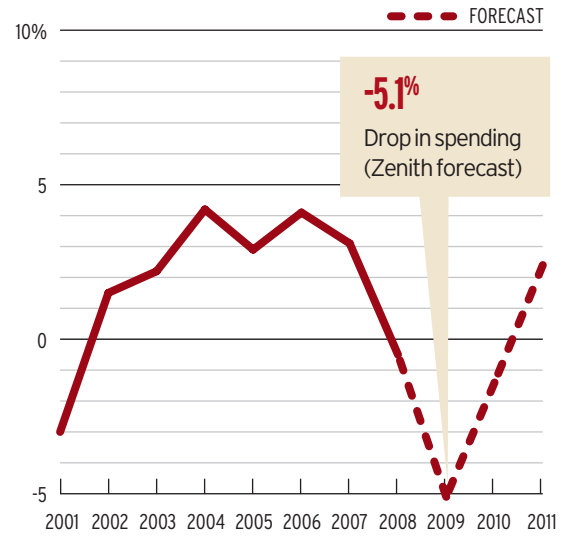
Percent change in ad spending for 100 LNA



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

**... BUT 2009 IS SHAPING UP TO BE WORSE**

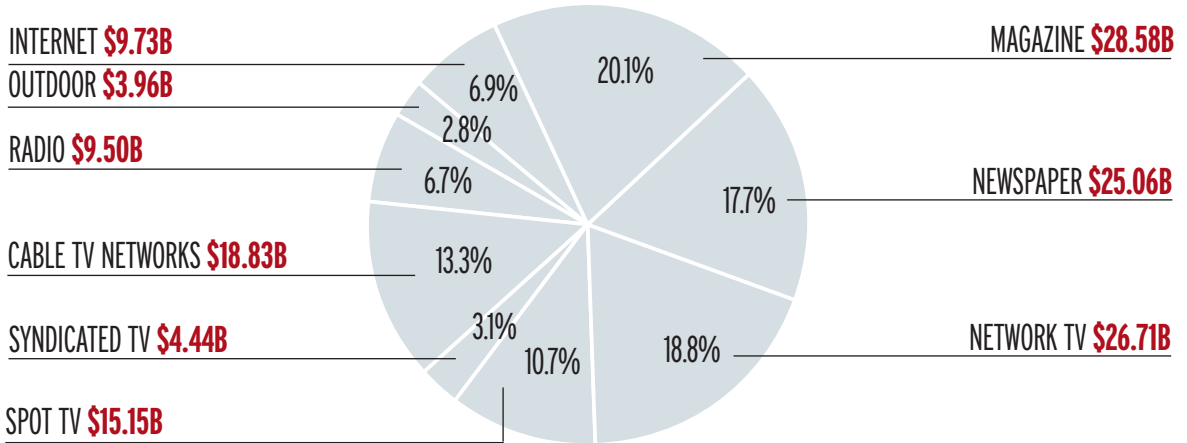
Change in U.S. ad spending (media plus marketing services)



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

**WHERE THE MONEY WENT**

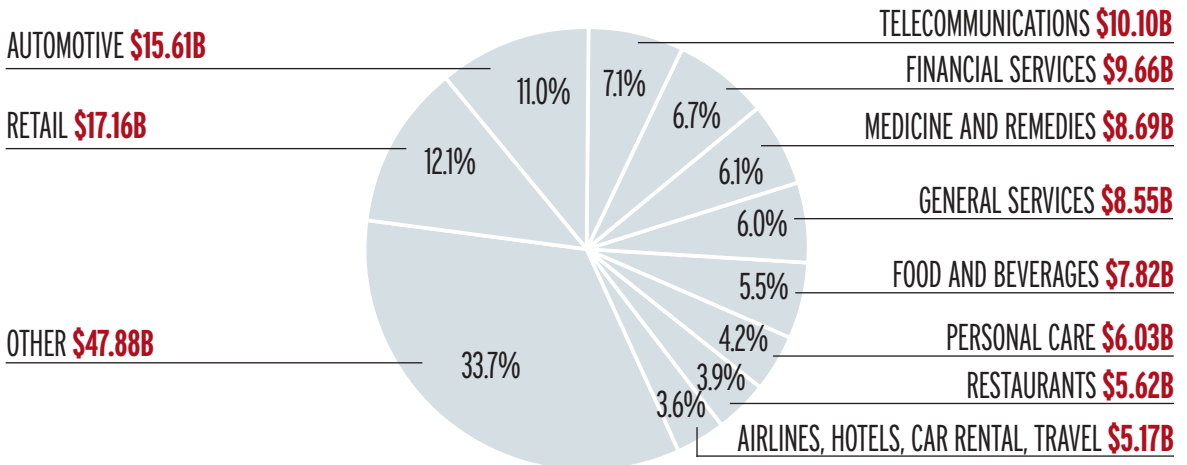
TNS 2008 U.S. measured media for all advertisers including LNA 100: \$142 billion.



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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