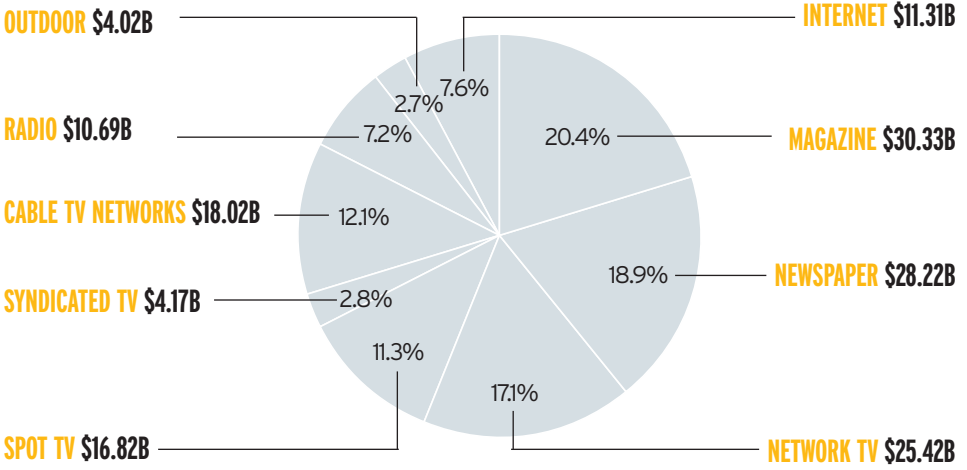


# 100 LEADING NATIONAL ADVERTISERS

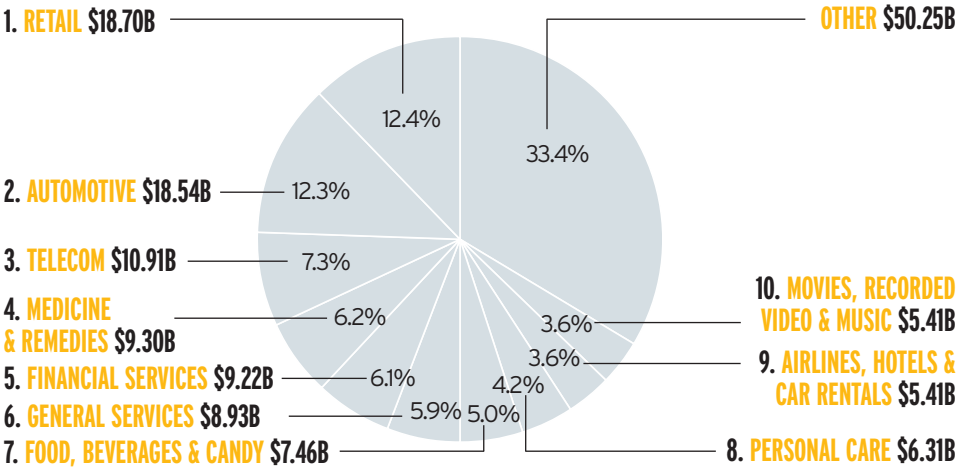
## HOW 2007 U.S. AD SPENDING WAS SPLIT BY MEDIUM ...

Total U.S. measured media spending—for all advertisers including the 100 LNA—edged up 0.2% to \$149 billion in 2007, according to TNS. What's up: internet (+15.9%). Going down: newspapers (-5.1%).



## ... AND BY ADVERTISING CATEGORY

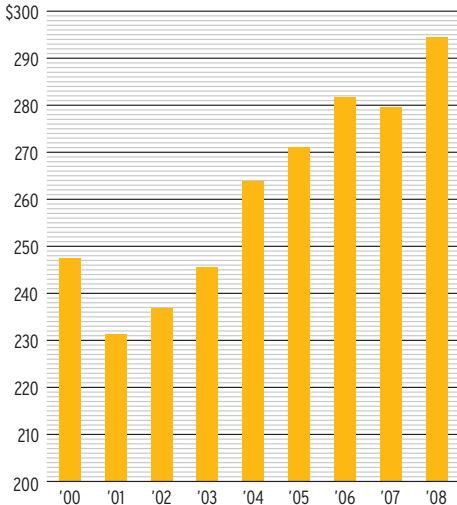
Retail in 2007 trumped automotive as the largest U.S. ad-spending category. The not-so-Big Three automakers again cut spending; General Motors, top spender as recently as 2004, ranked No. 4 in '07.



Source: TNS Media Intelligence. More info: tns-mi.com. Numbers rounded. Spending based on TNS's 18 measured media. 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 P. S-15 and P. S-19 for more detail. See P. S-15 for methodology

## TOTAL U.S. AD SPENDING: COEN

Ad watcher Robert Coen's final 2007 figure showed a 0.7% decline, just the fourth annual decline since 1950.



Ad spending in billions including national and local spending and direct mail. Chart shows Coen's final 2006 and 2007 figures and December '07 forecast for 2008. Source: Universal McCann's Robert J. Coen

## MEASURED SPENDING: % CHG.

Overall U.S. measured media spending grew just 0.2% in 2007, the weakest growth since the 2001 recession.



For all advertisers including 100 LNA. More info: tns-mi.com. Source: TNS Media Intelligence