

Advertising spend insights for the Advertising Standards Canada

April 29, 2009

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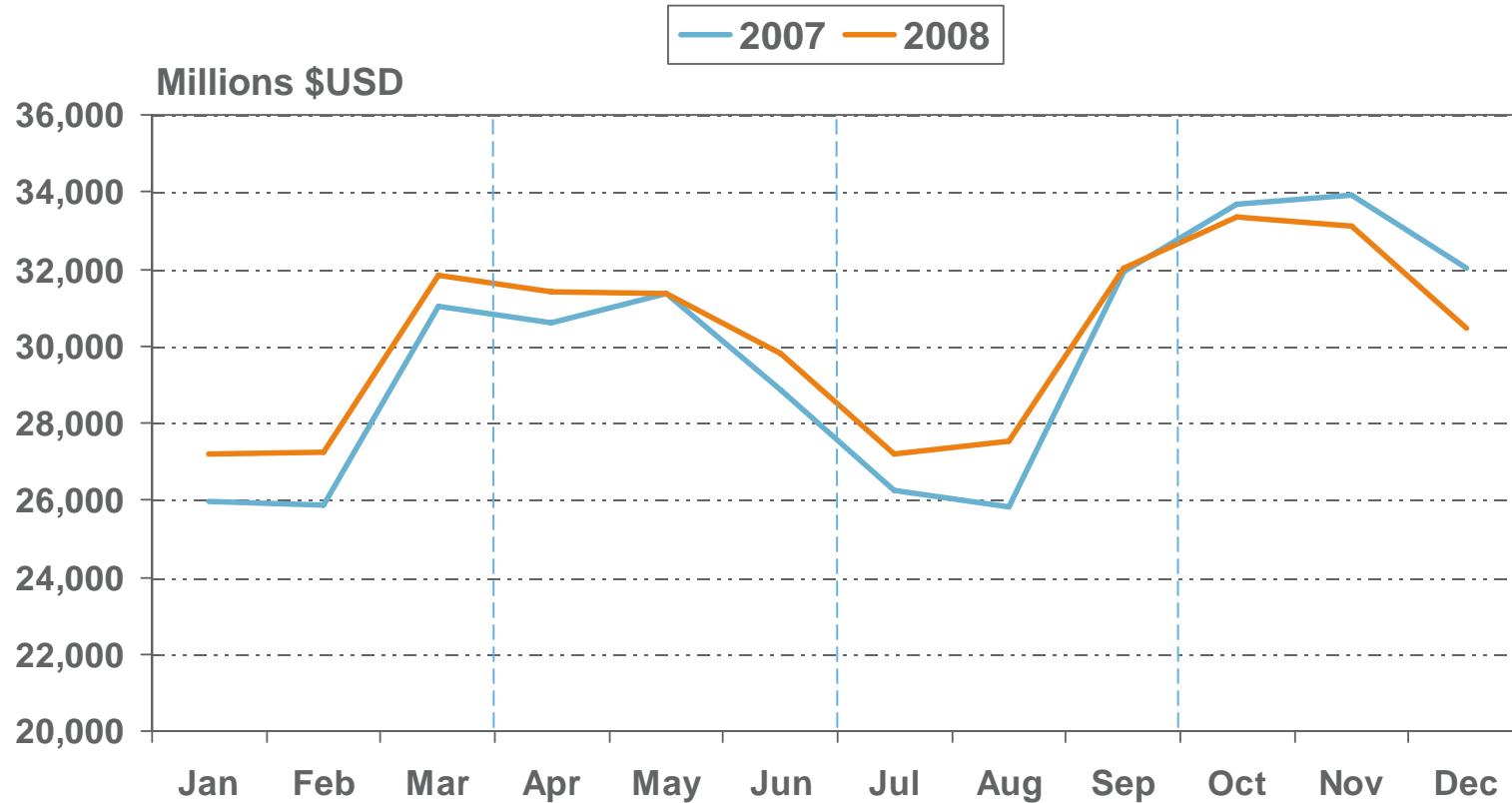
Media Canada



World Context

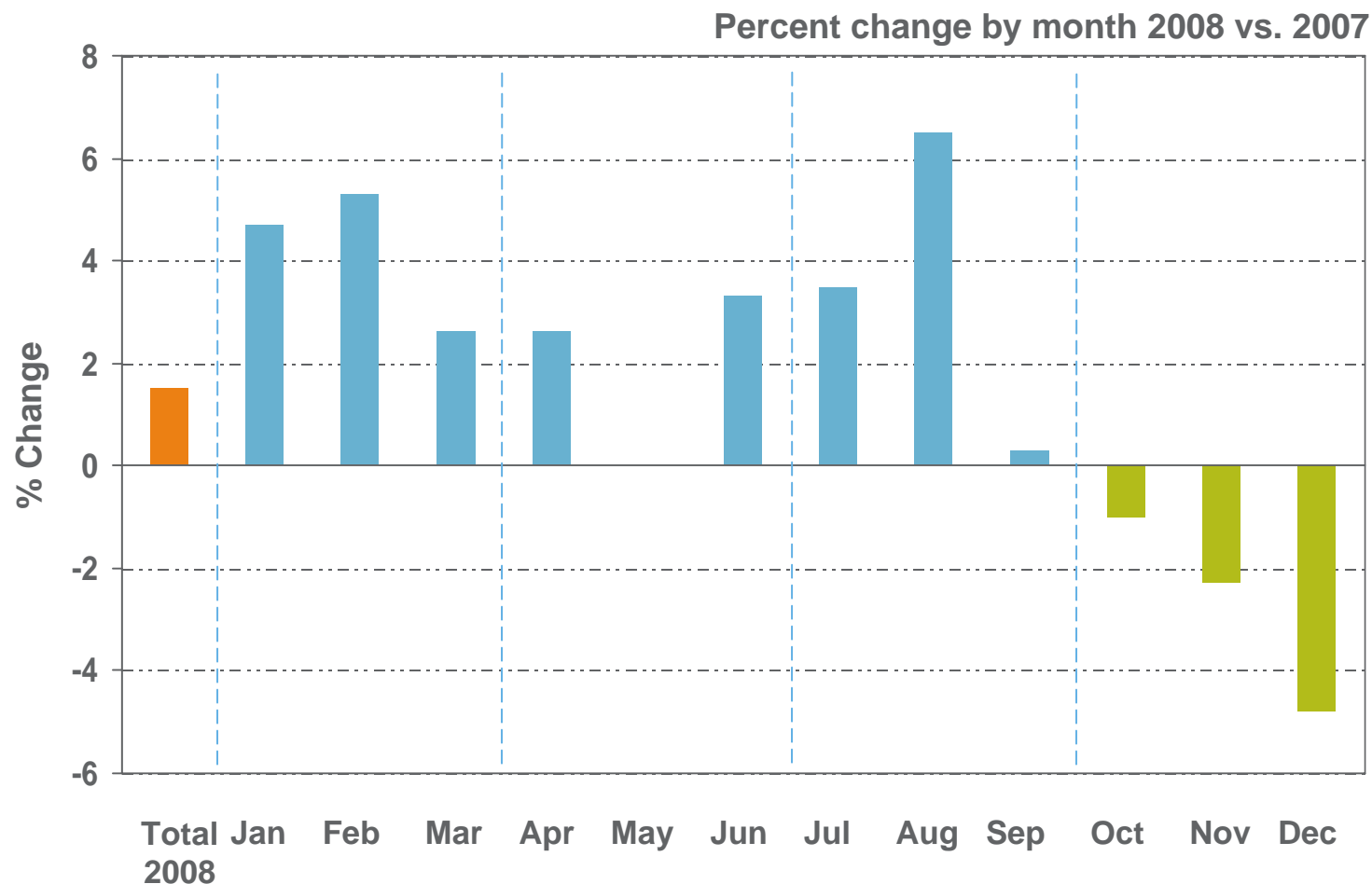


2008 closes: small increase of ad spend 1.5 percent versus 2007



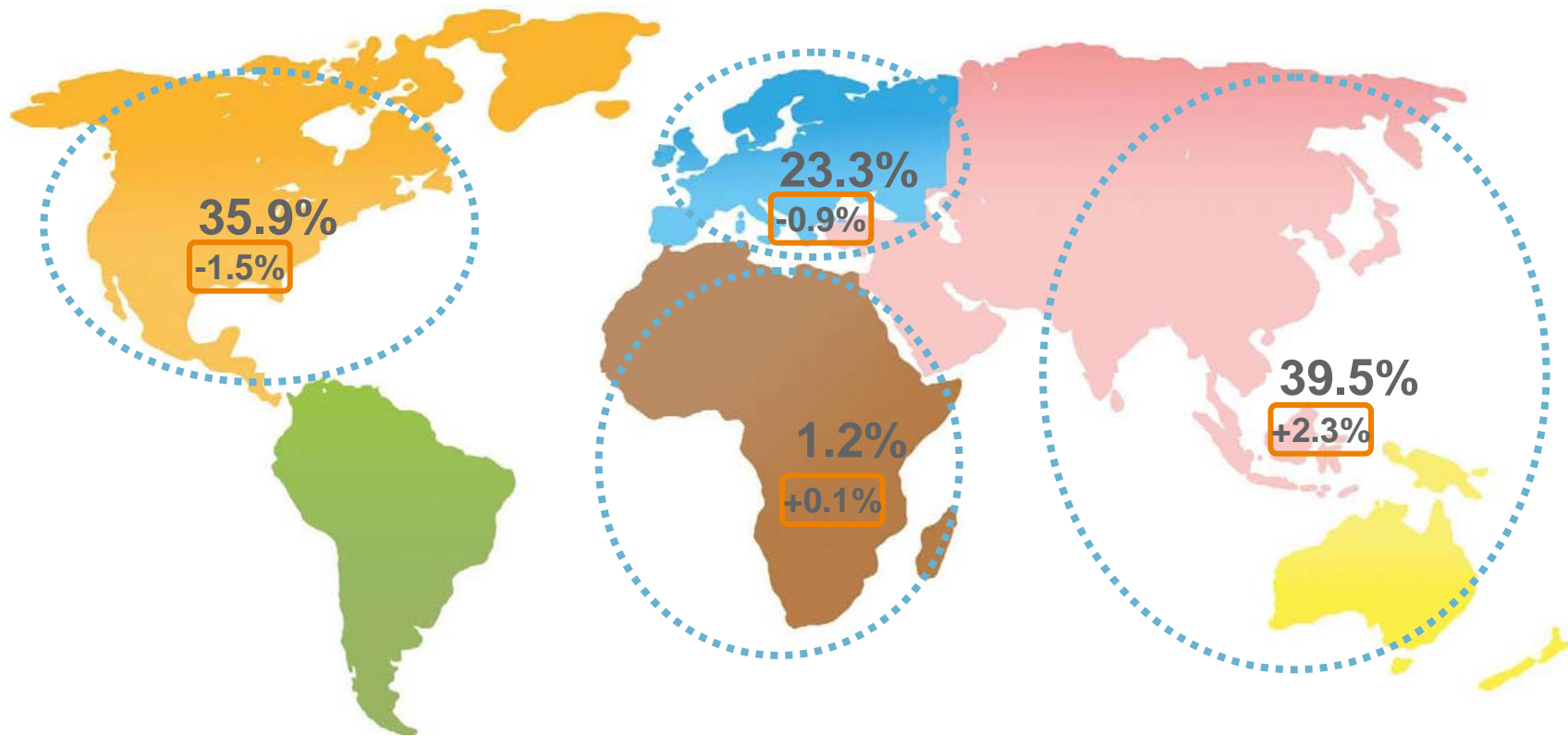
The Nielsen Company US, Global Ad*View Pulse, Quarter 4, 2008, TV, newspapers, magazines and radio

Globally, the economic downturn became evident during the last three months of 2008



The Nielsen Company US, Global Ad*View Pulse, Quarter 4, 2008, TV, newspapers, magazines and radio

2008 global advertising expenditure share by region

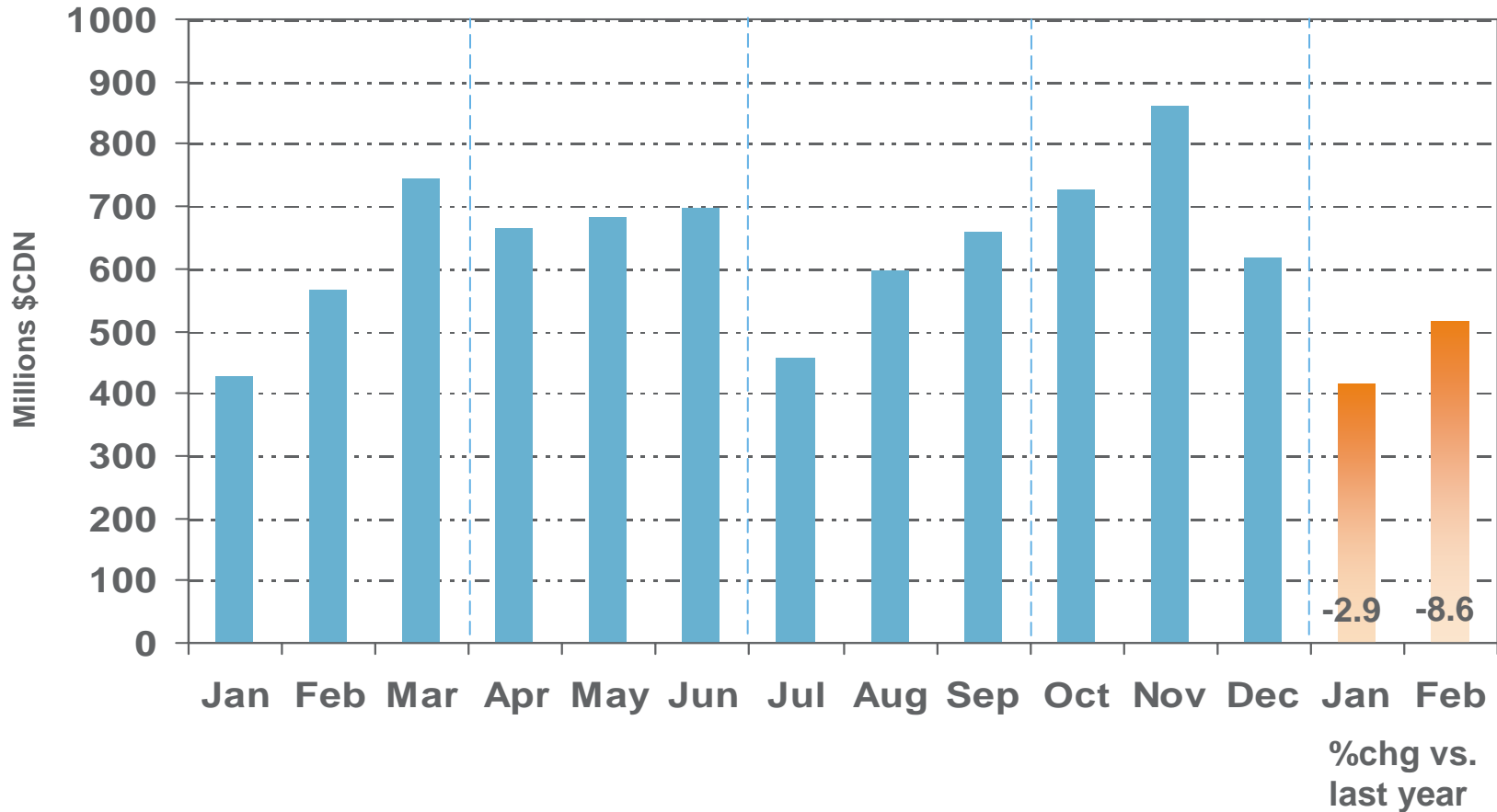


The Nielsen Company US, Global Ad*View Pulse, Quarter 4, 2008, TV, newspapers, magazines and radio



Canadian advertising expenditure trends

Ad spend declined by 6.1% during the first two months of 2009



The Nielsen Company, Advertising Expenditures TTL, TV, newspapers, magazines, radio and OOH

Ad Spend has dipped for all media at the start of the year

Dates	Newspaper Daily	Magazine	OOH	Radio	TV
Canada	\$(000)	\$(000)	\$(000)	\$(000)	\$(000)
Jan – Feb 2009	290.3	64.5	52.5	72.9*	452.1
Jan – Feb 2008	323.4	74.0	60.0	65.2	470.8
%Chg 2009 vs. 2008	-10.2	-12.8	-12.5	+11.8*	-4.0
2008 TTL %Share of Media	30.8	9.6	7.0	7.4	45.2
Estimated coverage increase*				14.1	
Revised %Chg 2009 vs. 2008				-9.8	
Global					
%Chg 2008 vs. 2007	-2.8	-6.3	NA	+0.4	+5.2

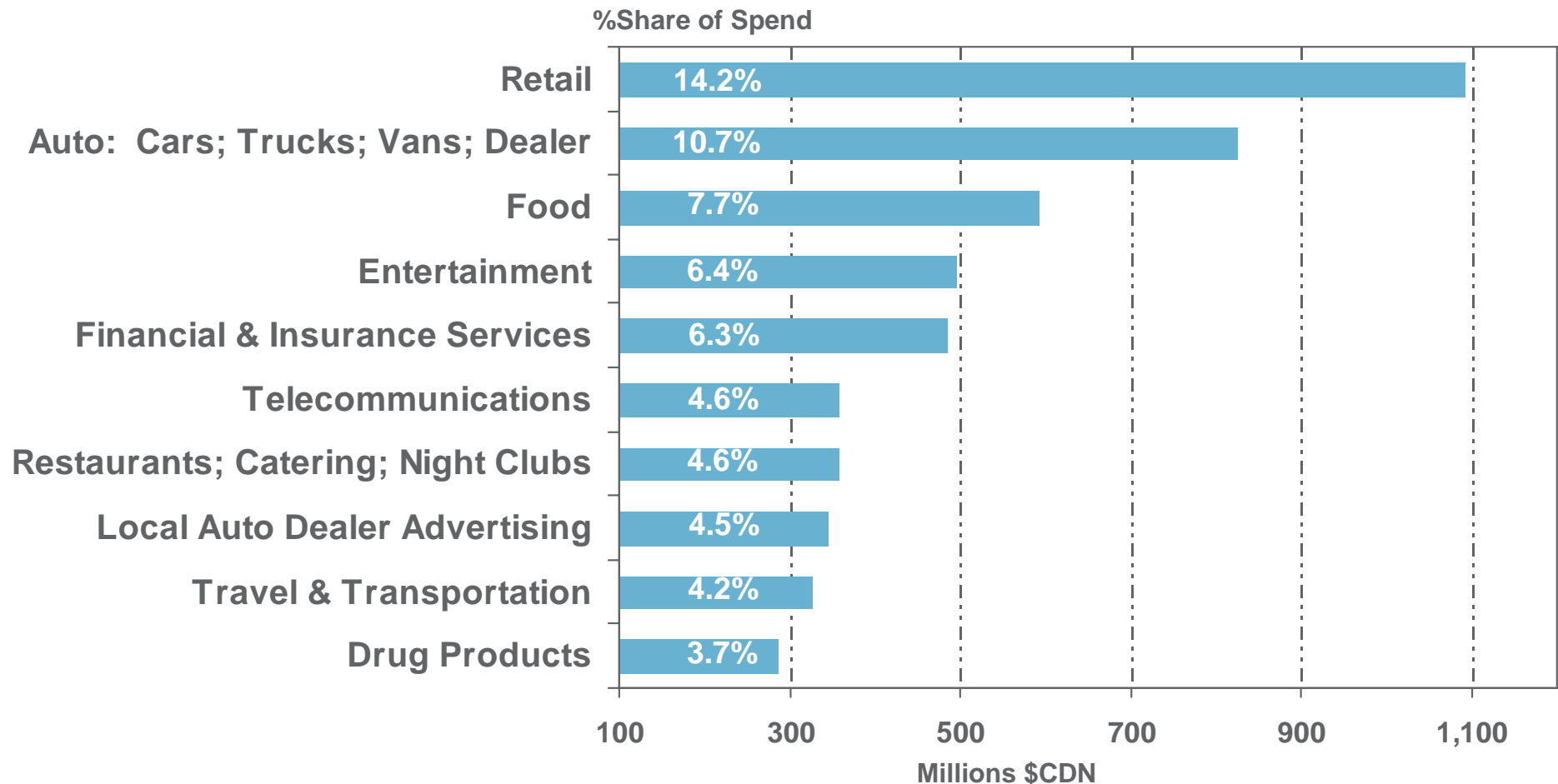
The Nielsen Company, Advertising Expenditures

*increase coverage in Montreal as of Sept 2008



Canadian Ad Expenditure vs ASC areas of interest

The top ten ad spending categories represent over 70 percent of 2008 spend activity



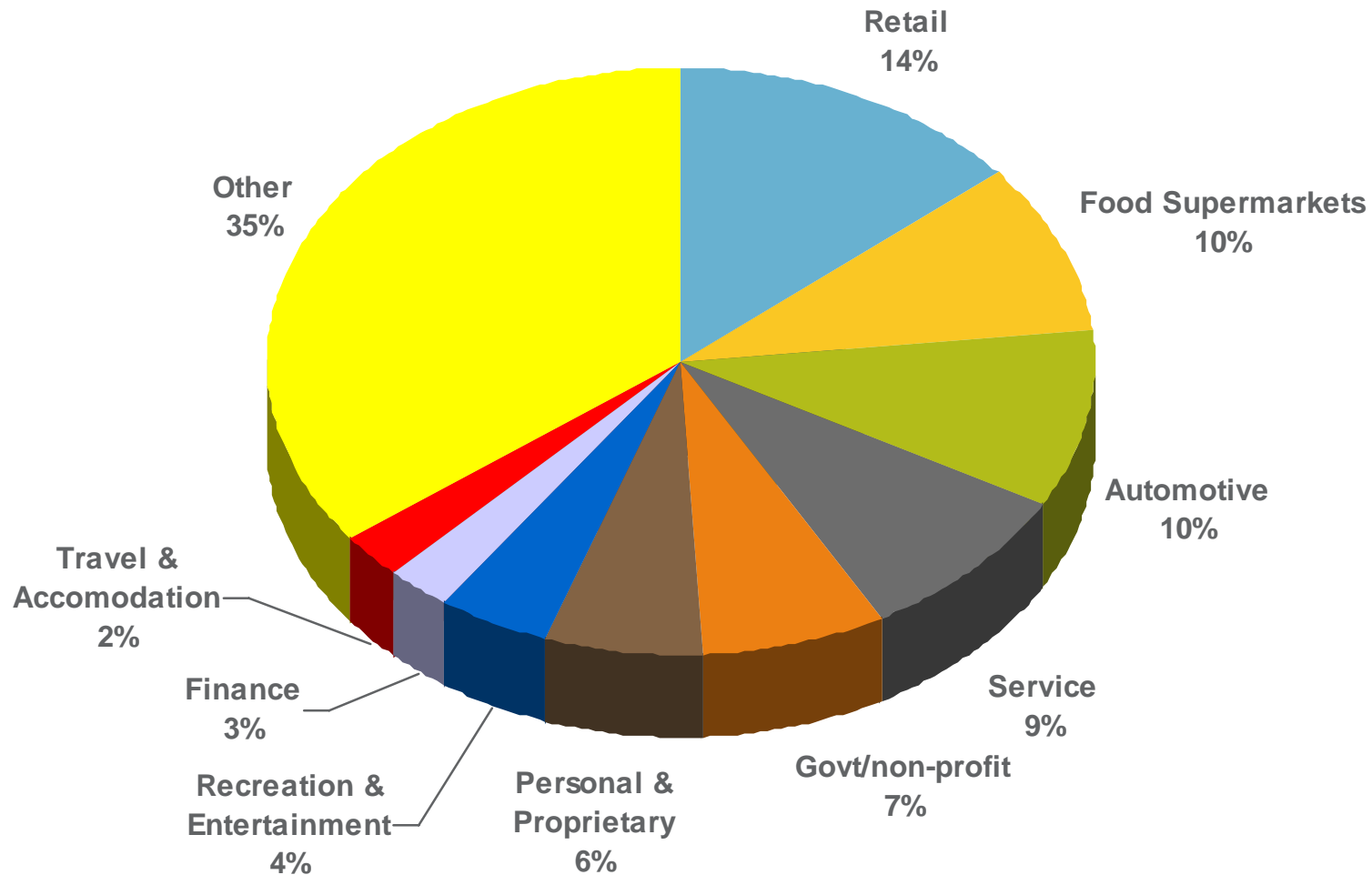
The Nielsen Company, Advertising Expenditures 2008 TTL, TV, newspapers, magazines, radio and OOH

2008 Canadian ad spend in categories of interest for external regulation

Rank	Category	%Share of Total Ad Spend
1	Auto: Car, Minivan, Truck, Van, Dealer and Local Dealer	15.2
2	Retail	14.2
3	Food	7.7
10	Drug Products	3.7
11	Cosmetic and Toiletry	3.4
15	Alcohol & Related Beverages	1.9
Total		46.1

Source: The Nielsen Company, Advertising Expenditures

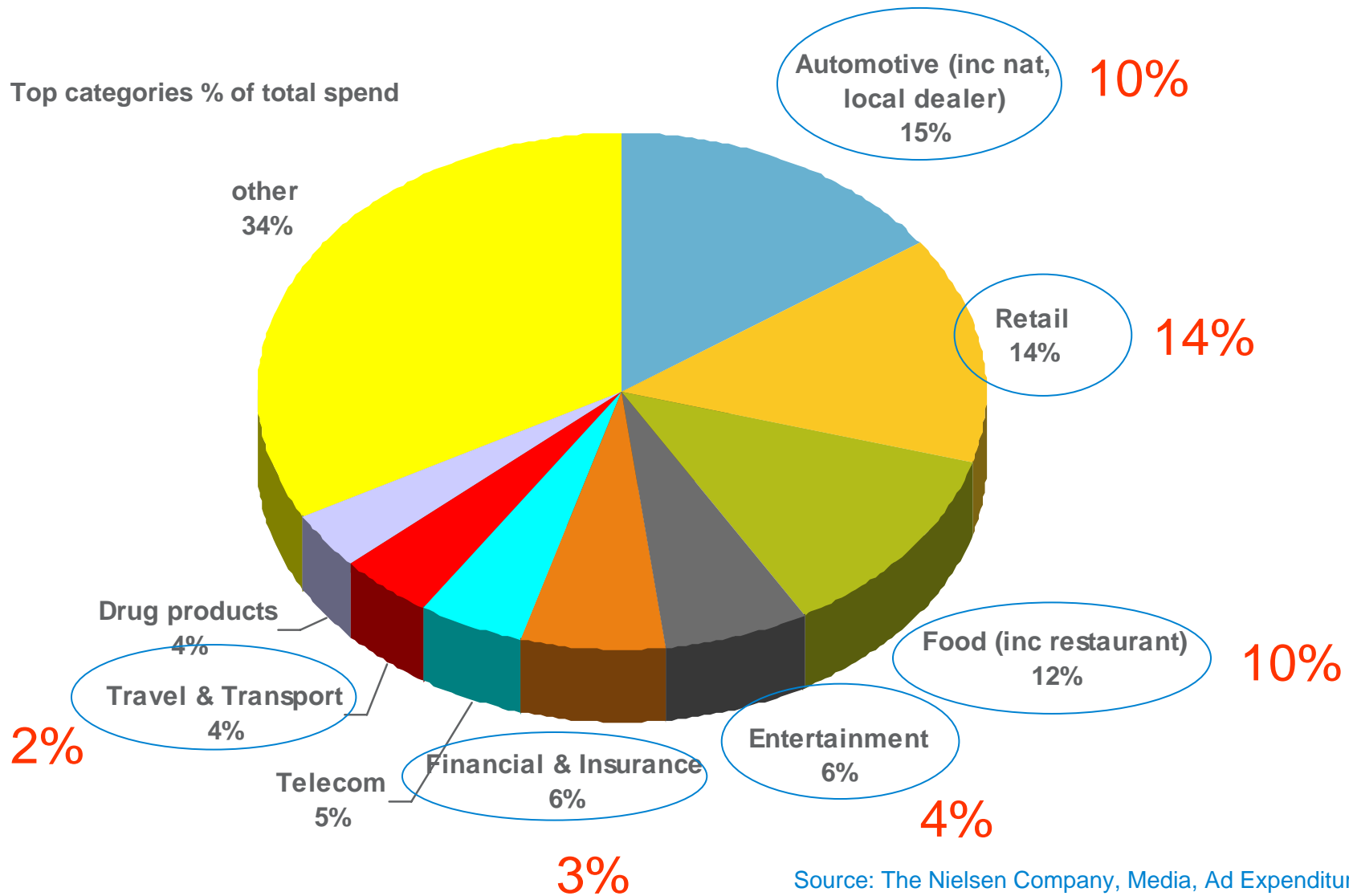
2008 ASC Complaints by Ad Category



Source: ASC Ad Complaints Report 2008 Year in Review

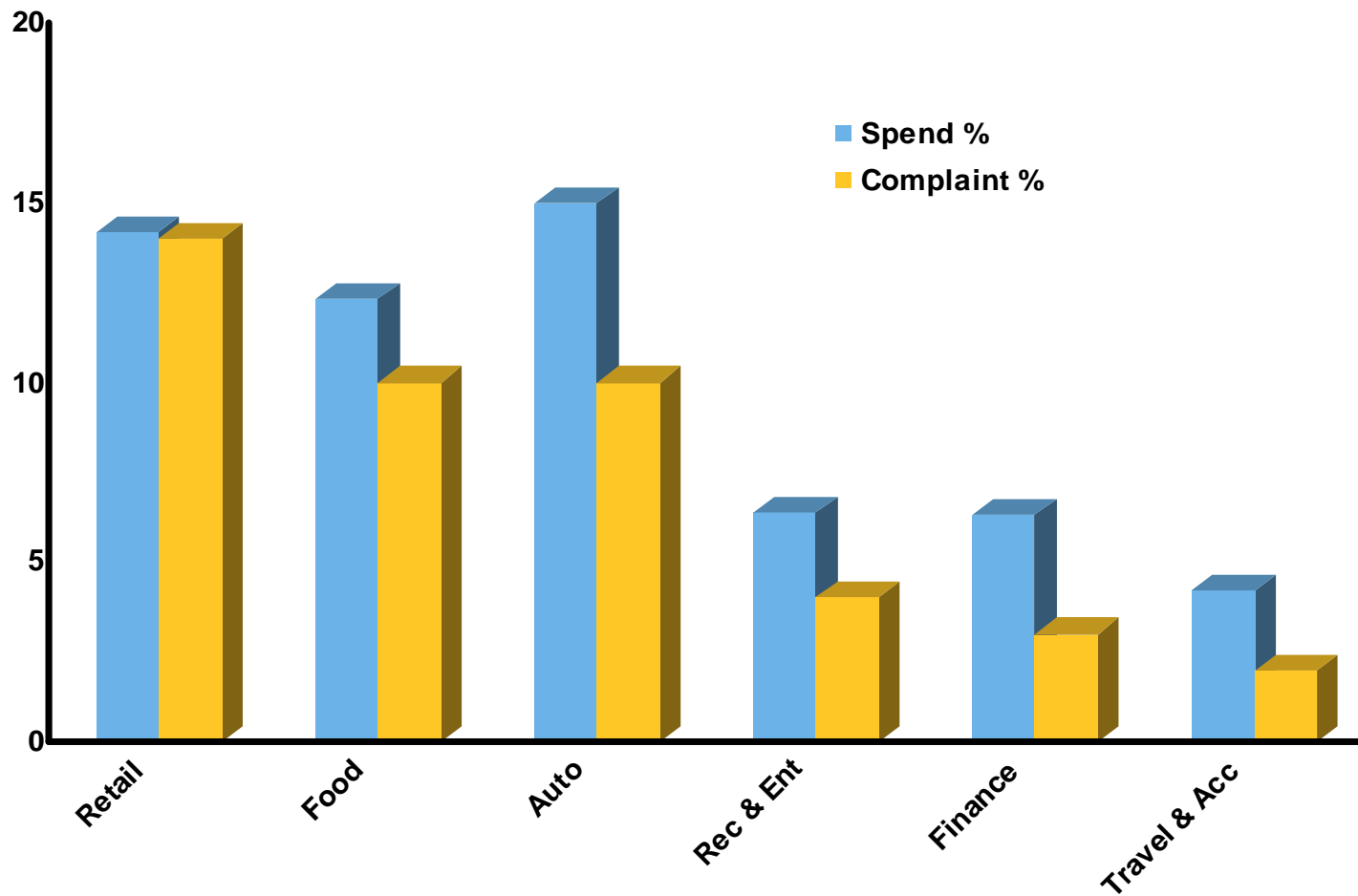
ASC complaints are proportional to ad spend

Top categories % of total spend



Source: The Nielsen Company, Media, Ad Expenditures 2008

Percentage Ad spend vs complaints



Source: The Nielsen Company, Media, Ad Expenditures 2008

In conclusion...

- Global ad spend is down overall although not in all regions
- Canada total ad spend is declining for first two months of 2009
- Impact varies by category and media
- ASC complaints are relatively proportional to ad spend

Thank you

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