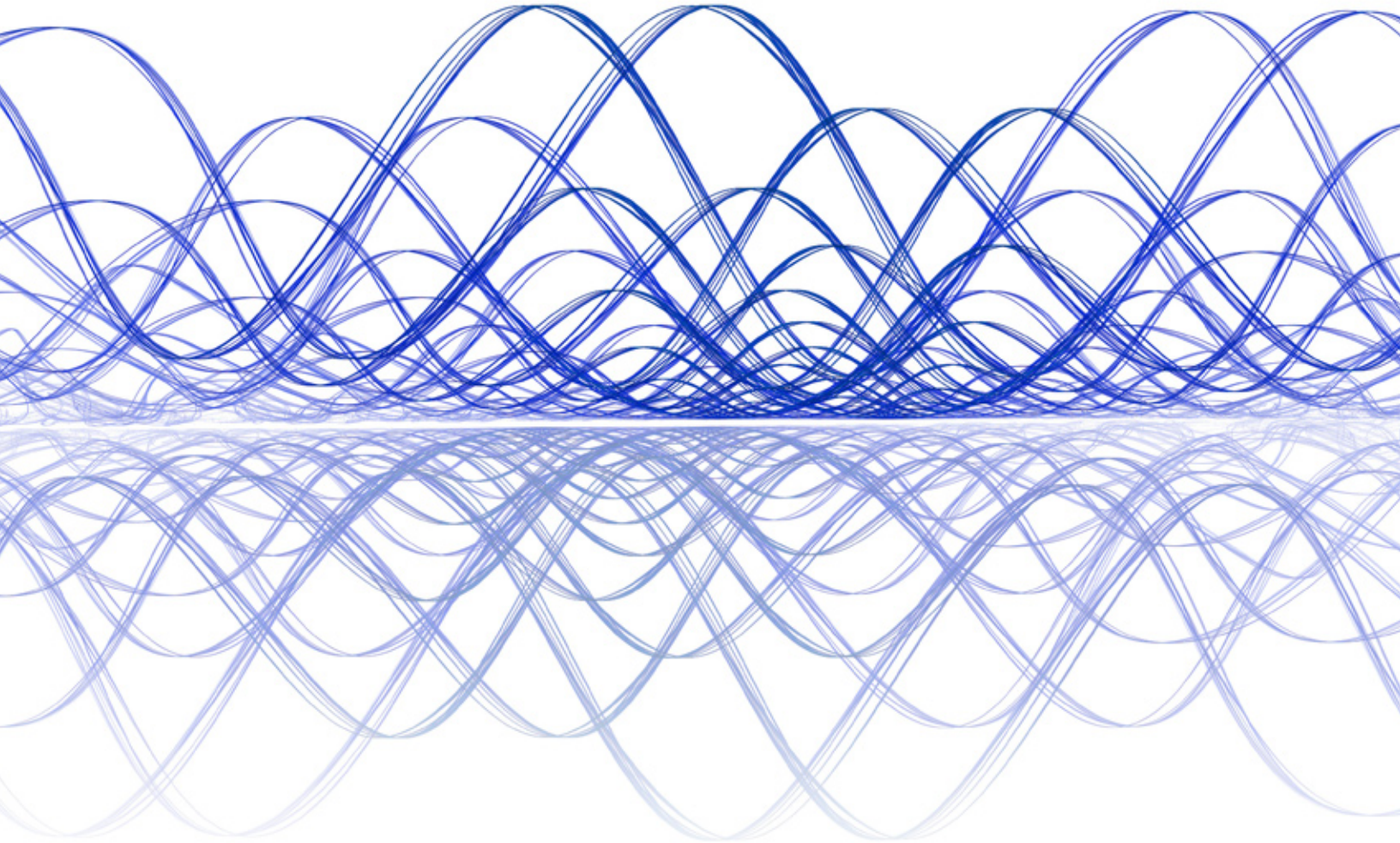


TNS Vibe

Economic Impact Monitor



Who will emerge stronger?

Who will fail?

Manage profitability

Who will survive?



Persistent change

Rebound in consumer behaviour

Guide your consumers

TNS Vibe highlights the new directions consumers are forging to meet today's economic challenges.

In difficult economic times, the ebb and flow of consumer sentiment has the power to damage traditionally strong brands, and, conversely, to pave the way for innovative and savvy new brands.

While the economy may be the catalyst for many changes, other deeper and more persistent changes in consumer behaviour are also occurring. Which consumer behaviours will rebound? Which consumer dynamics will be irrevocably altered when the economic climate improves? Who will survive, who will fail, and who will emerge stronger than ever before.

Across key sectors, TNS Vibe provides information to help marketers mitigate the negative effects of the softening economy, helping them manage the profitability of their business and guide their customers through these challenging times.

The survey data includes the Economic Recovery Index (ERI). Based on the TNS Consumer Confidence Index (CCI) framework, the ERI captures consumer sentiments and personal situation, as well as their outlook for the economy.



The first release of TNS Vibe provides detailed consumer purchase behaviour:

Cross-Category Information:

- Projected impact of economy on personal situation
- Areas of expected and actual changes in personal spending patterns
- Category specific changes in past six month purchasing behaviour

Sectors included Wave 1:

- Grocery
- Restaurants
- Alcoholic Beverages
- Telecommunications
- Financial Services
- Travel and Tourism

Grocery

- Main Grocery Store
- Stores shopped in past 4 weeks
- Incidence of shopping for groceries at major pharmacy chains
- Changes in overall grocery spending (same/less/more)
- Changes in way that you shop, or brands bought
- Other strategies to save money includes browsing flyers, collecting coupons, seeking out deals, buying bulk, shopping online

Restaurants

- Changes in overall restaurant spending (same/less/more)
- Incidence of cutting back on eating out
- Changes in the types of restaurants visited
- Changes in eating at fine dining establishments/family restaurants/fast food restaurants
- Changes in ordering take-out or home delivery meals
- Other strategies to save money while eating out

Alcoholic Beverages

- Incidence of buying category
- Changes in spending on beer/wine/spirits (same/less/more)
- Changes in frequency of drinking beer/wine/spirits (same/less/more often)
- Changes in purchases of domestic and imported brands of beer
- Changes in purchases of domestic, imported, value and premium brands of wine
- Changes in purchases of value and premium brands of spirits

Telecom

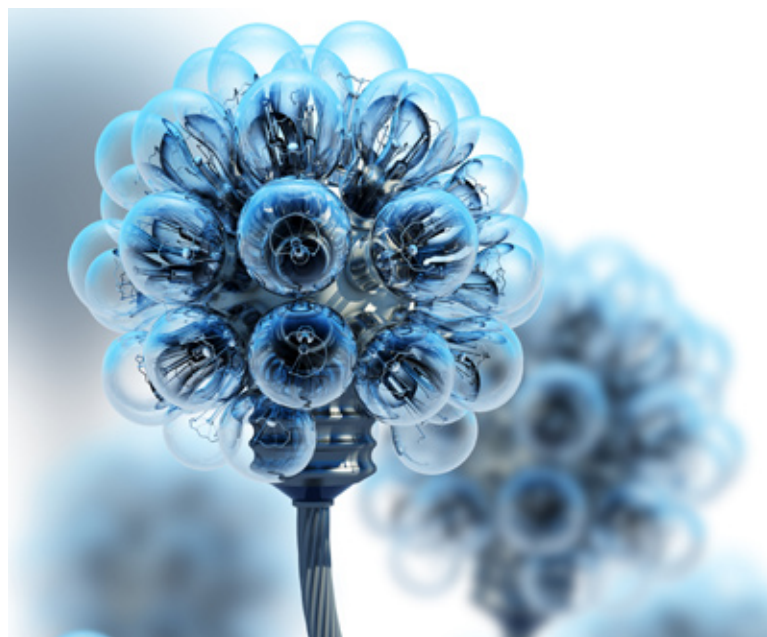
- Type of mobile phone plan and current primary provider
- Reason for choosing current provider
- Planned changes in phone service
- Wireless provider considering and reasons for consideration
- Possible actions to cut cell phone expenses
- Likelihood of subscribing to wireless service (among those not currently)
- Wireless provider would choose
- Type of mobile phone plan would choose and reasons why

Financial

- Main financial institution
- Impact of global economic downturn on banking behaviour
- Incidences of making changes to save banking fees
- Changes in investment strategy
- Incidence of owning a credit card
- Strategies in credit card use
- Perceived support offered by main financial institution regarding the economic downturn

Travel

- Overnight leisure trips in past 12 months and next 12 months
- Incidence of cancelled leisure trips
- Changes in types of travel (domestic/U.S./other international)
- Strategies to save money on travel
- Changes in the types of trips (same-day; short getaways; longer trips) (same/less/more)
- Attitudes toward an annual vacation



Investment:

- \$6,000 for initial subscription, varying based on information requirements
- \$3,500 for each quarterly update

Deliverables:

- National overview, which includes the Economic Recovery Index (ERI)
- Full set of detailed tables with results by age, gender, region, household income, and education
- Additional custom tabulations can also be provided for a minimal fee

About TNS

TNS is a global market insight and information group.

Our strategic goal is to be recognized as the global leader in delivering value-added information and insights that help our clients to make more effective decisions.

As industry thought leaders, our people deliver innovative thinking and excellent service to global organizations and local clients worldwide. We work in partnership with our clients, meeting their needs for high-quality information, analysis and foresight across our network of over 70 countries.

We are the world's foremost provider of custom research and analysis, combining in-depth industry sector understanding with world-class expertise in the areas of Retail and Shopper Insights, Stakeholder Management, New Product Development, and Brand and Communications. We are a major supplier of consumer panel, media intelligence and internet, TV and radio audience measurement services.

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