

$628 billion
Worldwide media spending forecast for 2020, up 5.1 percent

53 percent
Projected internet share of 2020 U.S. advertising. Internet spending will be double the level of 2016

MARKETING FACT PACK 2020

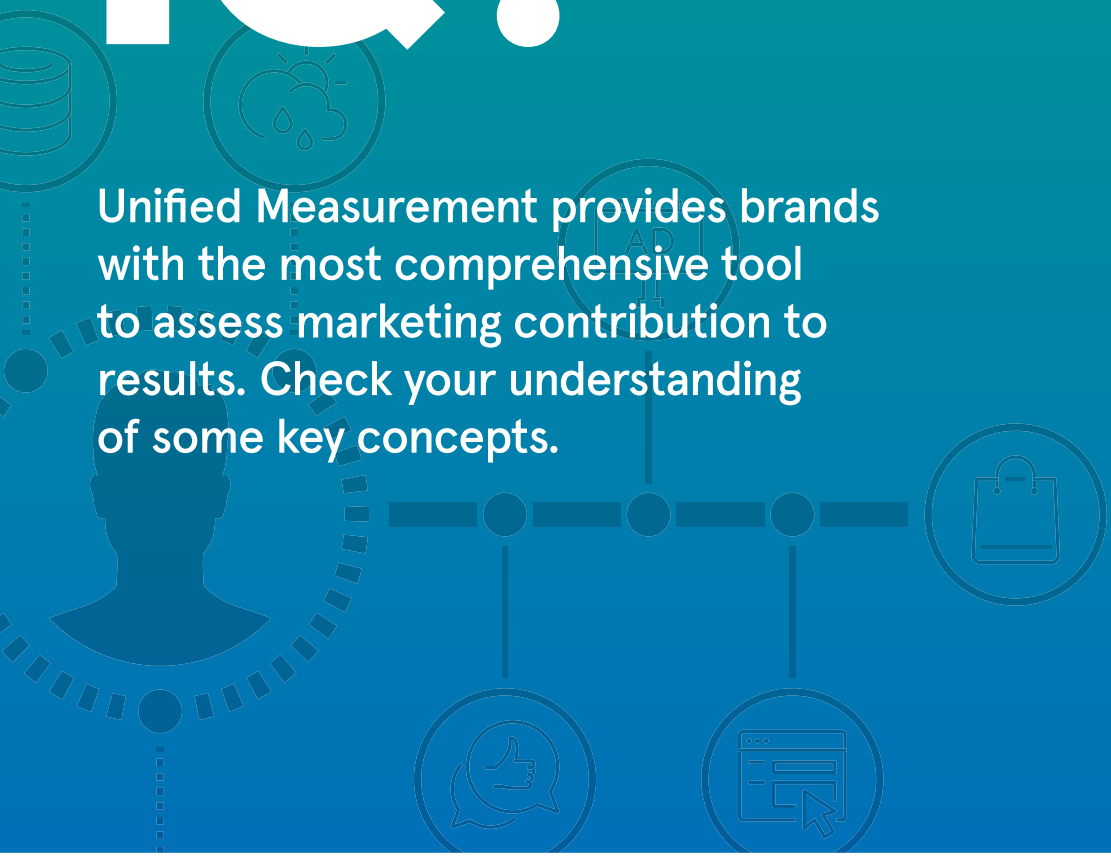
277,000
U.S. internet media employment, double the level of 2013

$1,531
Projected U.S. media and marketing spending per person in 2020

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Ad Age Marketing Fact Pack 2020

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THE BIG LIST

Ten key stats on the world of marketers, media and agencies. The internet in 2020 for the first time will account for more than half of both U.S. and worldwide ad spending.

1. Procter & Gamble Co.
World's biggest advertiser
$10.1 BILLION
Ad and marketing spending in year ended June 2019

2. Comcast Corp.
Nation's biggest advertiser
$6.1 BILLION
2018 U.S. ad, marketing and promotion spending

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Marketers with 2018 worldwide ad spending greater than $1 billion
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4. Geico
Most-advertised U.S. brand
$1.5 BILLION
2018 measured-media spending

5. Media spending
2020 world forecast
$628 BILLION
+5.1 percent

2020 U.S. forecast
$254 BILLION
+4.8 percent

6. Internet ad spending
2020 world forecast
$326 BILLION
+11.1 percent (52 percent of ad spending)

2020 U.S. forecast
$135 BILLION
+12.4 percent (53 percent of ad spending)

7. Google
Biggest U.S. digital media property
259 MILLION
Unique visitors in October 2019 (all Google sites)

8. TV
Time spent watching TV in 2018, Americans age 15+
2.6 HOURS A DAY

9. WPP
World's biggest agency company
$20.8 BILLION
2018 revenue

10. Accenture Interactive
World's biggest digital agency network
$8.5 BILLION
2018 revenue

Source: Ad Age Datacenter.

Marketing Mix Modeling (MMM) and Multi-Touch Attribution (MTA) approach marketing measurement in different ways.

WHICH STATEMENT(S) ABOUT MMM AND MTA ARE TRUE?

1. MTA is all I need to holistically measure the impact of both online and offline campaigns.
2. MMM is best for identifying marketing drivers at the individual level.
3. MTA is best for optimizing marketing investment allocations and predicting future outcomes.
4. MMM and MTA are complementary but can't be combined.

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NONE ARE TRUE.

MTA alone can't measure online and offline impact. MMM identifies aggregate, not individual level drivers, and is best for optimizing mix allocations.

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MARKETERS

U.S. and worldwide media advertising growth rates

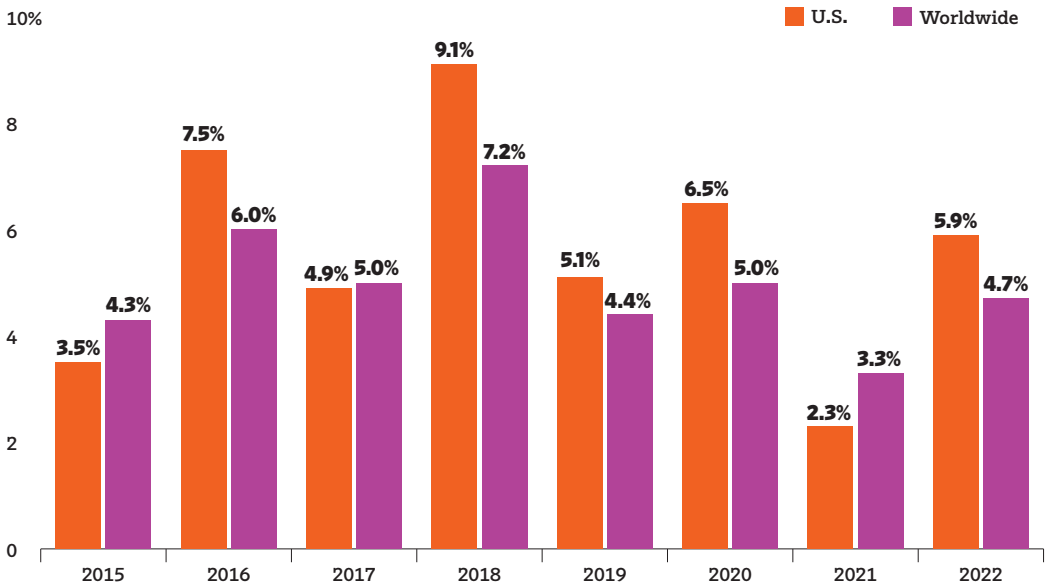
Percent change in ad spending, 2015-2022

Forecasts and revised historic data. The average of GroupM, Magna and Zenith forecasts suggests U.S. ad spending growth of 6.5 percent in 2020, boosted by political spending and the Olympics. Consensus for worldwide ad spending: +5.0 percent in 2020 vs. +4.4 percent in 2019.

	2015	2016	2017	2018	2019	2020	2021	2022
U.S.								
GroupM (WPP)	2.6%	7.9%	4.2%	9.5%	4.6%	8.1%	0.3%	6.4%
Magna (Interpublic)	3.7	9.3	2.9	9.5	5.1	6.6	1.4	5.8
Zenith (Publicis)	4.2	5.2	7.7	8.2	5.6	4.8	5.1	5.4
Average of GroupM, Magna and Zenith	3.5%	7.5%	4.9%	9.1%	5.1%	6.5%	2.3%	5.9%
Worldwide								
GroupM	3.7%	6.1%	4.5%	6.9%	3.7%	5.1%	1.9%	4.4%
Magna	4.7	6.3	4.5	7.9	5.2	5.7	3.4	5.1
Zenith	4.4	5.4	6.1	6.7	4.2	4.3	4.5	4.5
Average of GroupM, Magna and Zenith	4.3%	6.0%	5.0%	7.2%	4.4%	5.0%	3.3%	4.7%

Ad spending growth: U.S. and worldwide

Average of GroupM, Magna and Zenith forecasts, 2015-2022.



Source: December 2019 advertising forecasts of WPP's GroupM (This Year, Next Year), Interpublic Group of Cos.' Magna (Global Advertising Forecast–Winter Update) and Publicis Groupe's Zenith (Advertising Expenditure Forecasts). Numbers rounded. Figures include internet, TV, radio, newspaper, magazine and out of home. Spending includes political advertising. Growth based on ad spending in U.S. dollars in constant currency (factoring out currency movements), including growth that comes from media inflation, from GroupM and Magna "constant currency" figures and Zenith "current prices" figures. More info: groupm.com, magnaglobal.com, zenithmedia.com.

Zenith's 2020 U.S. media and marketing-services spending forecast: $509 billion

Estimated U.S. spending in media and marketing services. Zenith forecasts media ad spending to grow 4.8 percent in 2020. It expects 2020 total media and marketing-services spending to reach a record $509 billion—$1,531 per person.

	Spending (dollars in billions)			Year-to-year percent change		
Media	**2020**	**2019**	**2018**	**2020 vs. 2019**	**2019 vs. 2018**	**2018 vs. 2017**
Internet	$135.1	$120.2	$104.1	12.4%	15.4%	23.8%
TV	66.0	67.2	68.2	-1.8	-1.4	-0.4
Radio	17.6	17.6	17.6	0.0	0.0	0.0
Newspaper	13.0	13.9	15.1	-7.0	-8.0	-9.0
Magazine	11.5	12.8	14.1	-10.0	-9.4	-8.2
Outdoor and cinema	11.1	10.9	10.5	2.0	2.9	3.2
Total: Media	254.2	242.5	229.7	4.8	5.6	8.2
Marketing services						
Sales promotion	86.7	85.2	82.7	1.8	3.0	3.5
Telemarketing	61.4	60.8	59.6	1.0	2.0	3.0
Direct mail	47.4	46.3	47.7	2.5	-3.0	1.6
Event sponsorship	45.3	42.7	39.9	6.0	7.0	6.8
Directories	7.8	7.9	8.0	-2.0	-1.0	-0.4
Public relations	6.3	6.0	5.7	5.0	6.0	7.0
Total: Marketing services	254.9	248.9	243.6	2.4	2.2	3.5
Total: Media and marketing services	$509.1	$491.4	$473.3	3.6%	3.8%	5.7%

Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2019) based on current prices. Numbers rounded. More info: zenithmedia.com.

U.S. measured-media spending by medium in 2018

From Kantar for all advertisers and Ad Age Leading National Advertisers' top 200. Dollars in billions.

	Measured-media spending		
Medium	**All advertisers (including 200 LNA)**	**200 Leading National Advertisers**	**200 LNA's share**
TV	$77.0	$48.9	63%
Magazine	14.2	6.4	45
Newspaper	8.6	1.2	14
Radio	7.5	2.7	36
Outdoor	5.2	1.3	26
Subtotal	112.5	60.5	54
Desktop search	19.5	6.9	35
Desktop internet display	8.5	3.4	40
Subtotal	140.5	70.9	50
Other	13.0	NA	NA
Total	$153.5	NA	NA

From Ad Age Leading National Advertisers 2019 (June 24, 2019). Full report: AdAge.com/lna2019. Marketer database: AdAge.com/marketertrees2019. About LNA 2019: AdAge.com/aboutlna2019.

Source: Ad Age Datacenter. Numbers rounded. Measured-media spending from Kantar. More info: kantar.com/media.

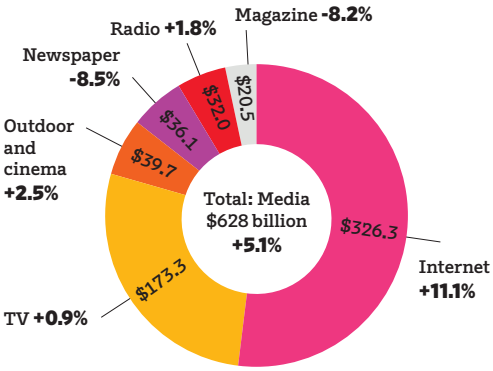
GroupM's 2020 worldwide media spending forecast: $628 billion

Estimated worldwide spending in media. GroupM forecasts media ad spending to grow 5.1 percent to $628 billion in 2020. It expects internet spending to increase 11.1 percent, the slowest growth rate since 2009.

	Spending (dollars in billions)			Year-to-year percent change		
Media	2020	2019	2018	2020 vs. 2019	2019 vs. 2018	2018 vs. 2017
Internet	$326.3	$293.7	$255.4	11.1%	15.0%	18.1%
TV	173.3	171.7	181.6	0.9	-5.5	1.8
Radio	32.0	31.5	31.8	1.8	-1.0	-0.1
Newspaper	36.1	39.5	44.4	-8.5	-11.1	-10.0
Magazine	20.5	22.3	24.7	-8.2	-9.6	-7.9
Outdoor and cinema	39.7	38.8	38.1	2.5	1.8	5.3
Total: Media	$628.0	$597.4	$576.0	5.1%	3.7%	6.9%

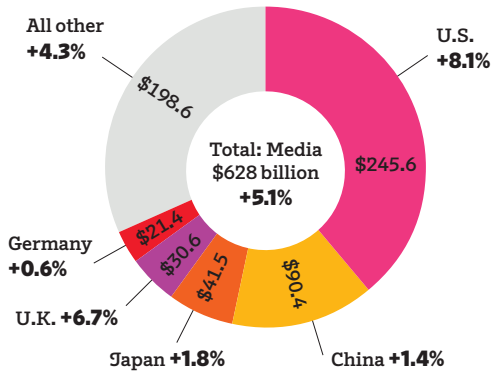
Worldwide ad spending by medium from GroupM

Media spending in 2020 and percent change vs. 2019. Dollars in billions.



World's five largest ad markets from GroupM

Media spending in 2020 and percent change vs. 2019. Dollars in billions.



GroupM's worldwide marketing spending estimate: $1.6 trillion to $1.9 trillion

Approximate worldwide marketing spending in 2019 as calculated by Brian Wieser, GroupM's global president, business intelligence.

Segment	Includes	Spending
Advertising	Media spending, broadly defined to include internet, TV, radio, newspaper, magazine, outdoor and cinema plus direct mail and directories	$700 billion
Services	Agencies, information technology services consultancies focused on marketing	$150 billion
Software	Ad tech, marketing tech	$150 billion
Other	Data, partner support, events, in-house activities, sales, retail activation, sponsorships	$600-$900 billion
Total: Marketing		$1.6-$1.9 trillion

Source: WPP's GroupM (This Year, Last Year, December 2019). Ad spending in constant currency, which factors out currency movements; not adjusted for inflation. Includes political advertising. Numbers rounded. More info: groupm.com.

Ad Age Leading National Advertisers: 25 biggest U.S. ad spenders

Ranked by 2018 total U.S. advertising spending. Dollars in millions.

Rank	Marketer	Headquarters	2018 total U.S. advertising spending	2018 U.S. measured-media spending
1	Comcast Corp.	Philadelphia	$6,122	$1,709
2	AT&T	Dallas	5,362	1,992
3	Amazon	Seattle	4,470	1,508
4	Procter & Gamble Co.	Cincinnati	4,305	2,814
5	General Motors Co.	Detroit	3,139	1,523
6	Walt Disney Co.	Burbank, Calif.	3,132	1,135
7	Charter Communications	Stamford, Conn.	3,042	366
8	Alphabet (Google)	Mountain View, Calif.	2,960	651
9	American Express Co.	New York	2,798	309
10	Verizon Communications	New York	2,682	1,090
11	Walmart	Bentonville, Ark.	2,604	688
12	JPMorgan Chase & Co.	New York	2,513	232
13	Ford Motor Co.	Dearborn, Mich.	2,331	1,000
14	Pfizer	New York	2,282	1,460
15	Nestlé	Vevey, Switzerland	2,202	897
16	Samsung Electronics Co.	Suwon, South Korea	2,152	571
17	Berkshire Hathaway	Omaha, Neb.	2,141	1,893
18	L'Oréal	Clichy, France	2,137	1,204
19	Fiat Chrysler Automobiles	London	2,129	844
20	Capital One Financial Corp.	McLean, Va.	2,065	656
21	Expedia Group	Bellevue, Wash.	1,953	1,089
22	Johnson & Johnson	New Brunswick, N.J.	1,765	935
23	Deutsche Telekom (T-Mobile US)	Bonn, Germany/ Bellevue, Wash.	1,700	1,088
24	LVMH Moët Hennessy Louis Vuitton	Paris	1,560	402
25	McDonald's Corp.	Chicago	1,541	761
Ad Age Leading National Advertisers: Top 25			$69.1B	$26.8B

From Ad Age Leading National Advertisers 2019 (June 24, 2019). Full report: AdAge.com/lna2019. Marketer database: AdAge.com/marketertrees2019. About LNA 2019: AdAge.com/aboutlna2019.

Source: Ad Age Datacenter. Total U.S. advertising spending is Ad Age estimate. U.S. measured-media spending from Kantar. Numbers rounded. More info: kantar.com/media.

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1. Comcast: Estimated advertising, marketing and promotion.
2. AT&T: Estimated pro forma ad spending including WarnerMedia, formerly Time Warner (acquired June 2018).
3. Amazon: Advertising and promotion.
4. Procter & Gamble: Estimated spending on advertising plus other marketing costs.
5. General Motors: Advertising and promotion.
6. Disney: Estimated pro forma ad spending including 21st Century Fox (acquired March 2019).
8. Alphabet: Advertising and promotion.
9. American Express: Estimated marketing and promotion.
12. JPMorgan Chase: Marketing expenses.
14. Pfizer: Estimate based on a revision to Ad Age's spending model.
15. Nestlé: Estimated "consumer facing" marketing expenses.
16. Samsung: Advertising and sales promotion.
18. L'Oréal: Advertising and promotion.
19. Fiat Chrysler Automobiles: FCA and PSA Group in October 2019 announced plan to merge.
21. Expedia: Estimated ad spending.
23. Deutsche Telekom: T-Mobile US in April 2018 signed deal to buy Sprint Corp.
24. LVMH: Advertising and promotion.
25. McDonald's: Estimated systemwide ad spending including spending from franchisees and company-owned restaurants.

Ad Age World's Largest Advertisers: 25 biggest ad spenders

Ranked by 2018 total worldwide advertising spending. Dollars in billions.

Rank	Marketer	Headquarters	2018 total worldwide advertising spending
1	Procter & Gamble Co.	U.S.	$10.1
2	Samsung Electronics Co.	South Korea	10.1
3	L'Oréal	France	9.6
4	Unilever	Netherlands/U.K.	8.5
5	Amazon	U.S.	8.2
6	Comcast Corp.	U.S.	7.5
7	Nestlé	Switzerland	7.3
7	LVMH Moët Hennessy Louis Vuitton	France	6.5
9	Alphabet (Google)	U.S.	6.4
10	AT&T	U.S.	6.2
11	Anheuser-Busch InBev	Belgium	6.0
12	Volkswagen	Germany	5.7
13	Booking Holdings	U.S.	5.0
14	Walt Disney Co.	U.S.	4.7
15	Toyota Motor Corp.	Japan	4.4
16	Coca-Cola Co.	U.S.	4.1
17	General Motors Co.	U.S.	4.0
17	Ford Motor Co.	U.S.	4.0
19	McDonald's Corp.	U.S.	3.8
20	American Express Co.	U.S.	3.8
21	Fiat Chrysler Automobiles	U.K.	3.6
22	Nike	U.S.	3.6
23	Adidas	Germany	3.5
24	Expedia Group	U.S.	3.5
25	Walmart	U.S.	3.5
Ad Age World's Largest Advertisers: Top 25			$143.7B

From Ad Age World's Largest Advertisers (Dec. 23, 2019).
Full report including ranking of top 100, profiles and expanded footnotes: AdAge.com/globalmarketers2019.

Source: Ad Age Datacenter. Total worldwide advertising spending from Ad Age Datacenter estimates and company financial filings. Numbers rounded.

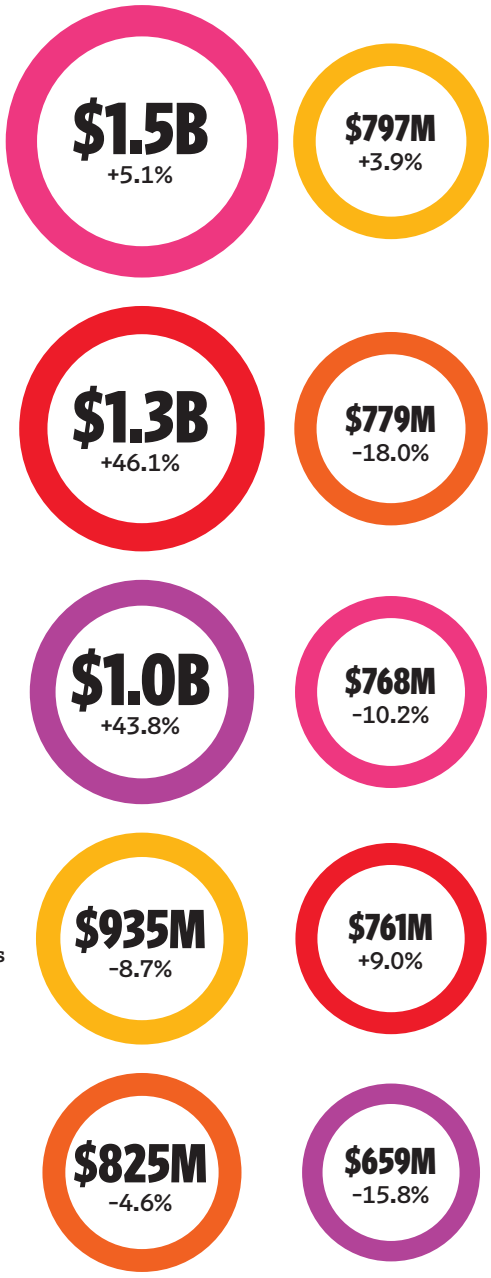
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1. Procter & Gamble: Year ended June 2019. Estimated spending on advertising plus other marketing costs.
2. Samsung: Advertising and sales promotion.
3. L'Oréal: Advertising and promotion.
4. Unilever: Brand and marketing investment costs.
5. Amazon: Advertising and promotion.
6. Comcast: Estimated pro forma advertising, marketing and promotion including Sky (acquired fourth-quarter 2018).
7. Nestlé: Estimated "consumer facing" marketing expenses.
8. LVMH: Advertising and promotion.
9. Alphabet: Advertising and promotion.
10. AT&T: Estimated pro forma ad spending including WarnerMedia, formerly Time Warner (acquired June 2018).
13. Booking: Marketing expenses (performance marketing and brand marketing).
14. Disney: Year ended October 2018. Estimated pro forma ad spending including 21st Century Fox (acquired March 2019).
15. Toyota: Year ended March 2019.
17. General Motors: Advertising and promotion.
19. McDonald's: Estimated worldwide systemwide ad spending including spending from franchisees and company-owned restaurants.
20. American Express: Estimated marketing and promotion.
21. Fiat Chrysler Automobiles: FCA and PSA Group in October 2019 announced plan to merge.
22. Nike: Year ended May 2019. Advertising and promotion excluding estimated worldwide cooperative ad spending.
23. Adidas: Marketing and point-of-sale expenses.
24. Expedia: Estimated ad spending.

10 most-advertised brands

Ranked by 2018 U.S. measured-media spending. Go with the Flo: Progressive's measured spending surged 43.8 percent in 2018.

More in Ad Age Datacenter
Marketers database:
Profiles, agency rosters
AdAge.com/marketertrees2019



From Ad Age Leading National Advertisers 2019 (June 24, 2019). See ranking of nation's 200 most-advertised brands: AdAge.com/lna2019.

Source: Ad Age Datacenter analysis of U.S. measured-media spending data from Kantar. Company's spending for all goods and services that fall under a given brand. Numbers rounded. More info: kantar.com/media.

Ad Age U.S. market leaders by category

2018 share and ad spending breakouts for marketers and brands. Dollars in millions.

Auto marketers

2018 U.S. market share for auto/light-truck marketers.

	Marketer	Market share	Total U.S. ad spending
1	General Motors Co.	17.0%	$3,139
2	Ford Motor Co.	14.3	2,331
3	Toyota Motor Corp.	14.0	1,444
4	Fiat Chrysler Automobiles	13.0	2,129
5	Honda Motor Co.	9.3	1,390
6	Nissan Motor Co.	8.6	1,069
7	Subaru Corp.	3.9	471
8	Hyundai Motor Co.	3.9	560
9	Volkswagen	3.7	728
10	Kia Motors Corp.	3.4	544
Top 10		91.1	$13,804
Industry total (*vehicles sold in millions)		17.3*	NA

Retailers

Ranking based on 2018 total U.S. ad spending.

	Marketer	Share of U.S. retail sales	Total U.S. ad spending
1	Amazon	3.4%	$4,470
2	Walmart	10.8	2,604
3	Target Corp.	2.1	1,494
4	Macy's	0.7	1,358
5	Kohl's Corp.	0.5	1,133
6	Home Depot	2.8	1,062
7	Lowe's Cos.	1.9	869
8	Kroger Co.	3.4	752
9	J.C. Penney Co.	0.3	724
10	Best Buy Co.	1.1	712
Top 10		27.1	$15,177
Industry total (*U.S. sales, dollars in trillions)		$3.5*	NA

Auto brands

2018 U.S. market share for auto/light-truck brands.

	Brand/marketer	Market share	Measured media
1	**Ford** Ford Motor Co.	13.7%	$779
2	**Toyota** Toyota Motor Corp.	12.3	571
3	**Chevrolet** General Motors Co.	11.7	825
4	**Honda** Honda Motor Co.	8.3	440
5	**Nissan** Nissan Motor Co.	7.8	496
6	**Jeep** Fiat Chrysler Automobiles	5.6	353
7	**Subaru** Subaru Corp.	3.9	304
8	**Hyundai** Hyundai Motor Co.	3.9	310
9	**Ram** Fiat Chrysler Automobiles	3.4	302
10	**Kia** Kia Motors Corp.	3.4	292
Top 10		74.1	4,671
Industry total (*vehicles sold in millions)		17.3*	$7,587

Restaurant chains

2018 U.S. market share based on systemwide sales.

	Chain/marketer	Market share	Measured media
1	**McDonald's** McDonald's Corp.	6.9%	$761
2	**Starbucks** Starbucks Corp.	3.5	79
3	**Subway** Doctor's Associates	1.9	325
4	**Taco Bell** Yum Brands	1.9	415
5	**Chick-fil-A** Chick-fil-A	1.8	103
6	**Burger King** Restaurant Brands International	1.8	337
7	**Wendy's** Wendy's Co.	1.7	272
8	**Dunkin'** Dunkin' Brands Group	1.6	140
9	**Domino's** Domino's Pizza	1.2	418
10	**Panera Bread** Pret Panera Holding Co.	1.0	56
Top 10		23.3	2,906
Industry total (*U.S. sales, dollars in billions)		$556*	$6,180

From Ad Age Leading National Advertisers 2019 Fact Pack (June 24, 2019). Numbers rounded. Expanded footnotes and source information available in that Fact Pack at AdAge.com/trend-reports. Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar. More info: kantar.com/media. About LNA 2019: AdAge.com/aboutlna2019.

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Auto marketers, auto brands: Market share calculations by Ad Age Datacenter based on sales figures from Automotive News Data Center. More info: autonews.com. **Retailers:** Census Bureau (U.S. retail sales). More info: census.gov. Amazon: Share shown is Ad Age Datacenter estimate. **Restaurant chains:** Technomic 2019 Top 500 Chain Restaurant Report (sales used to calculate market share). More info: technomic.com. Systemwide sales is franchised plus company-owned restaurants. Chick-fil-A, Panera Bread and Starbucks based on estimated sales. Pret Panera Holding Co. is owned by JAB Holding Co.

Ad Age U.S. market leaders by category

2018 share and ad spending breakouts for marketers and brands. Dollars in millions.

Personal care brands

Share of 2018 U.S. personal care measured-media spending.

	Brand/marketer	Share of ad spend	Measured media
1	**L'Oréal Paris** L'Oréal	9.5%	$546
2	**Olay** Procter & Gamble Co.	4.5	255
3	**Maybelline New York** L'Oréal	4.2	241
4	**Neutrogena** Johnson & Johnson	3.8	218
5	**Garnier** L'Oréal	3.8	215
6	**Always** Procter & Gamble Co.	3.7	213
7	**Dove** Unilever	3.3	187
8	**Crest** Procter & Gamble Co.	2.4	138
9	**Gillette** Procter & Gamble Co.	2.3	133
10	**Sensodyne** GlaxoSmithKline	2.2	125
Top 10		39.7	2,271
Total personal care measured-media spending		100.0%	$5,724

Household products

Share of 2018 U.S. household product measured-media spending.

	Brand/marketer	Share of ad spend	Measured media
1	**Tide** Procter & Gamble Co.	10.7%	$233
2	**Febreze** Procter & Gamble Co.	9.2	201
3	**Downy** Procter & Gamble Co.	8.7	189
4	**Gain** Procter & Gamble Co.	6.0	130
5	**Bounty** Procter & Gamble Co.	4.7	101
6	**Charmin** Procter & Gamble Co.	4.4	96
7	**Clorox** Clorox Co.	4.0	87
8	**Lysol** RB (Reckitt Benckiser Group)	3.2	70
9	**OxiClean** Church & Dwight Co.	2.9	63
10	**Duracell** Berkshire Hathaway	2.8	61
Top 10		56.5	1,232
Total household product measured-media spending		100.0%	$2,180

Prescription drug brands

Share of 2018 U.S. prescription drug measured-media spending.

	Brand/marketer	Share of ad spend	Measured media
1	**Humira** AbbVie	7.7%	$483
2	**Lyrica** Pfizer	4.3	272
3	**Xeljanz** Pfizer	4.1	257
4	**Chantix** Pfizer	3.3	208
5	**Trulicity** Eli Lilly & Co.	3.3	207
6	**Eliquis** Bristol-Myers Squibb Co.	3.0	188
7	**Cosentyx** Novartis	2.9	183
8	**Keytruda** Merck & Co.	2.8	180
9	**Ibrance** Pfizer	2.5	160
10	**Otezla** Amgen	2.5	158
Top 10		36.4	2,293
Total prescription drug measured-media spending		100.0%	$6,308

Wireless services

2018 U.S. market share for wireless service providers.

	Marketer	Market share	Measured media
1	Verizon Communications	32.9%	$694
2	AT&T	30.1	512
3	Deutsche Telekom (T-Mobile US)	16.3	1,062
4	SoftBank Group Corp. (Sprint Corp.)	11.1	754
5	América Móvil (Tracfone Wireless)	7.0	250
6	Telephone and Data Systems (U.S. Cellular)	1.4	36
Top 6		98.8	3,309
Other		1.2	1,505
Total wireless services measured-media spending		100.0%	$4,814

From Ad Age Leading National Advertisers 2019 Fact Pack (June 24, 2019). Numbers rounded. Expanded footnotes and source information available in that Fact Pack at AdAge.com/trend-reports. Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar. More info: kantar.com/media. About LNA 2019: AdAge.com/aboutlna2019.

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Personal care, household products, prescription drug brands: Ad Age Datacenter analysis of U.S. measured-media spending. Bristol-Myers Squibb on Nov. 20, 2019, bought Celgene Corp. In connection with that deal, Celgene on Nov. 21, 2019, sold global rights for Otezla to Amgen. **Wireless services:** U.S. network operator market share based on data from Comscore MobiLens for subscribers age 13-plus who owned a mobile phone, three months ended December 2018. More info: comscore.com/MobiLensPlus. Ad spending for companies' wireless services. Industry total spending includes measured-media spending by major phone suppliers. T-Mobile US in April 2018 signed a deal to buy Sprint Corp.

Insurance brands

Share of 2018 U.S. insurance industry measured-media spending.

	Brand/marketer	Share of ad spend	Measured media
1	**Geico** Berkshire Hathaway	21.8%	$1,546
2	**Progressive** Progressive Corp.	14.8	1,048
3	**State Farm** State Farm Mutual Auto Insurance Co.	8.9	629
4	**Allstate** Allstate Corp.	5.6	397
5	**Liberty Mutual** Liberty Mutual Insurance Co.	4.2	297
6	**USAA** United Services Automobile Association	2.7	190
7	**UnitedHealthcare** UnitedHealth Group	2.7	188
8	**Nationwide** Nationwide Mutual Insurance Co.	2.3	161
9	**The General** American Family Mutual Insurance Co.	1.9	137
10	**Farmers Insurance** Zurich Insurance Group	1.8	129
Top 10		66.7	4,722
Total insurance industry measured-media spending		100.0%	$7,082

Beer marketers

2018 U.S. market share based on shipment volume.

	Marketer	Market share	Measured media
1	Anheuser-Busch InBev (Budweiser)	41.0%	$554
2	Molson Coors Beverage Co. (Coors, Miller)	23.5	320
3	Constellation Brands (Corona, Modelo)	10.0	368
4	Heineken	3.5	151
5	Pabst Brewing Co.	2.1	1
6	Boston Beer Co. (Samuel Adams)	2.0	55
7	D.G. Yuengling & Son	1.3	10
8	Mark Anthony Group (Mike's Hard Lemonade)	1.2	6
9	Diageo (Guinness)	1.2	13
10	Florida Ice and Farm Co. (Genesee, Labatt)	1.1	1
Top 10		87.0	1,479
Industry total (*barrels in millions)		212.5*	$1,522

Credit cards

2018 U.S. market share based on card purchase volume.

	Marketer	Market share	Measured media
1	American Express Co.	20.5%	$221
2	JPMorgan Chase & Co. (Chase)	20.1	73
3	Citigroup (Citibank)	11.2	81
4	Bank of America Corp.	9.8	1
5	Capital One Financial Corp.	9.2	449
6	U.S. Bancorp (U.S. Bank)	4.0	1
7	Discover Financial Services	3.8	262
8	Wells Fargo & Co.	3.7	1
Top 8		82.2	1,089
Other		17.8	441
Industry total (*purchase volume, dollars in trillions)		$3.7*	$1,530

Beverage brands

2018 U.S. market share based on sales volume.

	Brand/marketer	Market share	Measured media
1	**Coke** Coca-Cola Co.	11.6%	$393
2	**Pepsi** PepsiCo	5.0	261
3	**Mountain Dew** PepsiCo	3.7	119
4	**Dr Pepper** Keurig Dr Pepper	3.5	106
5	**Gatorade** PepsiCo	3.1	142
6	**Nestlé Pure Life** Nestlé	3.1	8
7	**Sprite** Coca-Cola Co.	2.8	30
8	**Poland Spring** Nestlé	2.6	3
9	**Dasani** Coca-Cola Co.	2.2	0
10	**Aquafina** PepsiCo	1.8	1
Top 10		39.3	1,062
Industry total (*gallons in billions)		33.9*	$1,870

From Ad Age Leading National Advertisers 2019 Fact Pack (June 24, 2019). Numbers rounded. Expanded footnotes and source information available in that Fact Pack at AdAge.com/trend-reports. Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar. More info: kantar.com/media. About LNA 2019: AdAge.com/aboutlna2019.

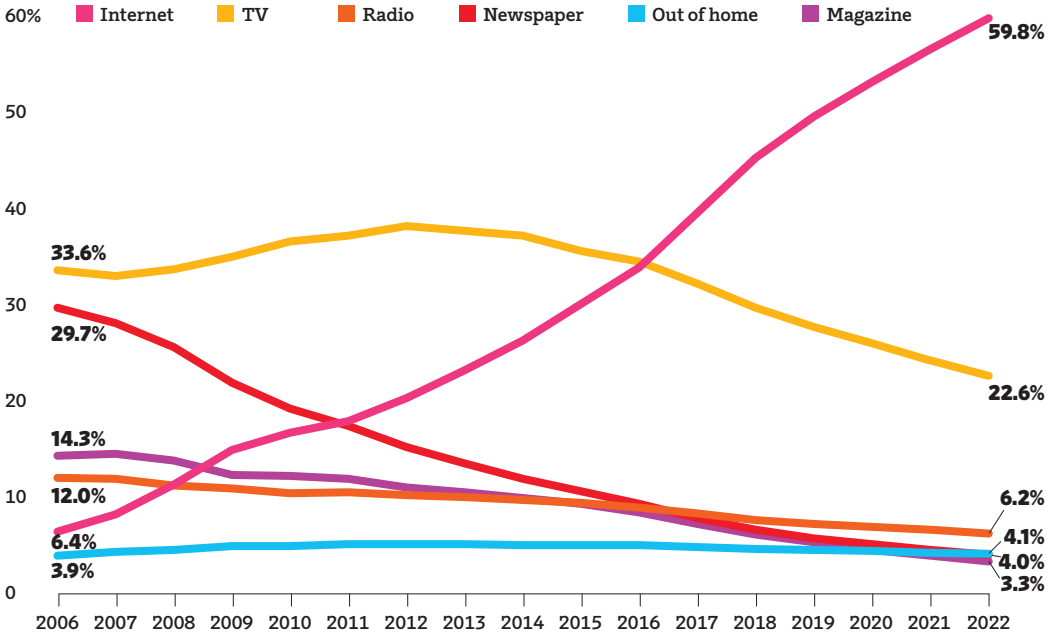
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Insurance brands: Ad Age Datacenter analysis of U.S. measured-media spending.
Beer marketers: Beer Marketer's Insights (U.S. market share, U.S. industry sales). More info: beerinsights.com. Measured-media spending for marketers' beer brands. Selected brands shown.
Credit cards: The Nilson Report. More info: nilsonreport.com. Market share of general purpose credit cards based on total purchase volume. Measured-media spending for companies' credit cards.
Beverage brands: Beverage Marketing Corp. More info: beveragemarketing.com.

MEDIA

Share of U.S. ad spending by medium

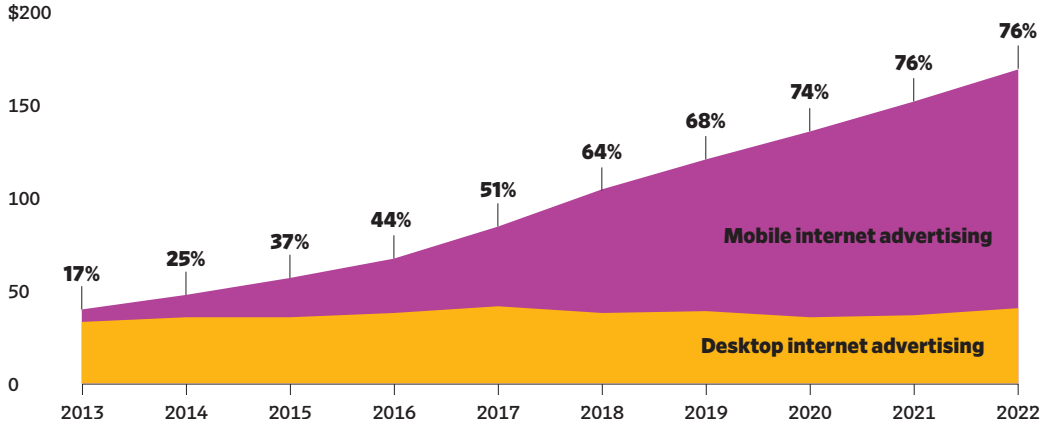
From Zenith. The media agency expects the internet to pass the halfway point in 2020, reaching 53 percent of ad spending, with the internet's share rising to nearly 60 percent in 2022. The internet accounted for less than 17 percent of ad spending in 2010.



Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2019) based on current prices. Numbers rounded. Internet including internet display, online video, classified, paid search, internet radio, podcasts and social media for desktop and mobile. Out of home including outdoor and cinema. More info: zenithmedia.com.

U.S. internet ad spending and mobile's share of internet ad spending

Total U.S. internet ad spending (mobile plus desktop) from Zenith. Dollars in billions. Mobile's share of U.S. internet advertising. Mobile will account for more than three-fourths of internet ad spending in 2022.



Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2019) based on current prices. Numbers rounded. Includes desktop and mobile classified, display, paid search, podcast, radio, social media and video. More info: zenithmedia.com.

U.S. share of digital media time spent by platform

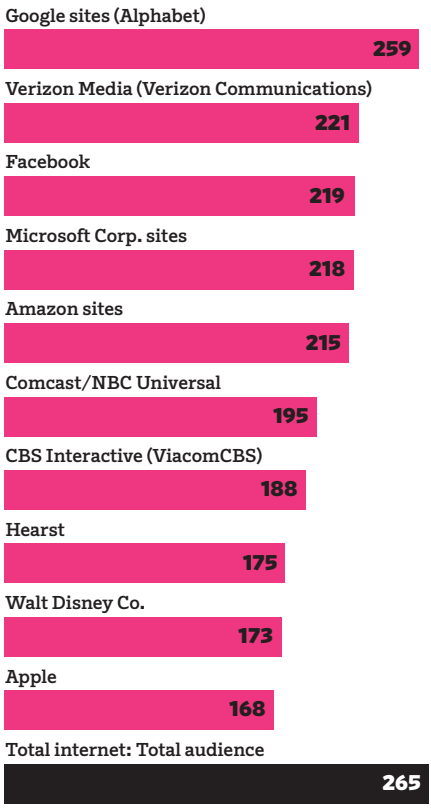
From October 2019. Smartphone apps are the digital platform of choice across age groups.

			Mobile consists of:			
Age	Desktop	Mobile	Smartphone app	Smartphone web	Tablet app	Tablet web
18-24	16.8%	83.2%	71.4%	6.5%	4.8%	0.5%
25-34	21.9	78.1	65.5	7.3	4.6	0.7
35-44	22.0	78.0	66.4	7.3	3.5	0.8
45-54	23.2	76.8	63.0	7.5	5.1	1.2
55-64	18.1	81.9	65.9	8.8	5.8	1.4
65+	33.3	66.7	43.9	6.2	13.0	3.6
Adults: 18+	21.8%	78.2%	64.2%	7.4%	5.5%	1.2%

Source: Comscore Media Metrix Multi-Platform and Comscore Mobile Metrix, October 2019, U.S. Numbers rounded. More info: comscore.com.

Digital: 10 largest U.S. multiplatform digital media properties

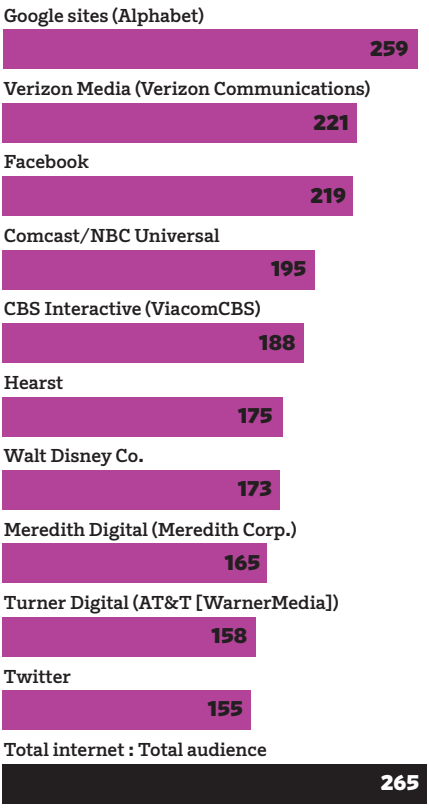
By October 2019 unique visitors in millions.



Source: Comscore Media Metrix Multi-Platform, October 2019, U.S. Numbers rounded. Universe: Desktop 2+ and Total Mobile 13+. More info: comscore.com.

Digital: 10 largest U.S. multiplatform streaming video properties

By October 2019 unique visitors in millions.



Source: Comscore Media Metrix Multi-Platform, October 2019, U.S. Numbers rounded. Universe: Desktop 2+ and Total Mobile 13+. More info: comscore.com.

Cost for a 30-second commercial

Estimated ad costs for a spot on fall 2019 broadcast network TV schedule. Percent change vs. fall 2018 prices. Prime time's most expensive spot is NBC's "Sunday Night Football," where the average cost for a 30-second commercial is $685,227.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
ABC (Walt Disney Co.)							
7:00 p.m.	America's Funniest Home Videos **$54,237, -4%**						
7:30							
8:00	Kids Say the Darndest Things **$69,944, NA**	Dancing with the Stars **$91,170, -20%**	The Conners **$135,996, -32%**	The Goldbergs **$134,284, -1%**	Grey's Anatomy **$186,026, -9%**	American Housewife **$74,590, -39%**	Saturday Night Football **$112,685, 21%**
8:30			Bless This Mess **$89,343, NA**	Schooled **$98,874, NA**		Fresh off the Boat **$71,616, -9%**	
9:00	Shark Tank **$78,213, -3%**		Mixed-ish **$88,480, NA**	Modern Family **$148,228, -10%**	A Million Little Things **$112,465, -21%**	20/20 **$42,624, -4%**	
9:30			Black-ish **$87,475, -26%**	Single Parents **$90,315, -25%**			
10:00	The Rookie **$67,567, -23%**	The Good Doctor **$133,281, -15%**	Emergence **$79,302, NA**	Stumptown **$88,692, NA**	How to Get Away with Murder **$99,922, -21%**		
CBS (ViacomCBS)							
7:00 p.m.	60 Minutes **$117,822, NA**						
7:30							
8:00	God Friended Me **$85,306, -19%**	The Neighborhood **$111,203, 32%**	NCIS **$135,858, 0%**	Survivor **$132,801, -3%**	Young Sheldon **$160,698, -25%**	Hawaii Five-0 **$80,965, -8%**	Crimetime Saturday **$18,064, -32%**
8:30		Bob Hearts Abishola **$92,844, NA**			The Unicorn **$134,107, NA**		
9:00	NCIS: Los Angeles **$93,071, 8%**	All Rise **$70,583, NA**	FBI **$97,710, -11%**	Seal Team **$86,043, -17%**	Mom **$124,636, -1%**	Magnum P.I. **$72,716, NA**	Crimetime Saturday **$21,880, -25%**
9:30					Carol's Second Act **$107,161, NA**		
10:00	Madam Secretary **$67,231, -34%**	Bull **$89,981, -12%**	NCIS: New Orleans **$96,197, -4%**	S.W.A.T. **$88,924, -15%**	Evil **$99,202, NA**	Blue Bloods **$83,064, -2%**	48 Hours **$36,332, -24%**

From "TV's most expensive commercials for the 2019-'20 season" (AdAge.com, Oct. 7, 2019), by Jeanine Poggi. Networks may have made some changes to schedules since then. Table excludes shows that start at midseason.

Broadcast network TV's most expensive scheduled program is Fox's broadcast of NFL games on Sunday evenings, which are not technically in prime time; average price for a 30-second spot is $689,988, flat with one year ago.

Source: Ad Age. Based on data from as many as eight agencies. The resulting prices should be viewed as directional indicators and are not the actual price that every advertiser pays for a 30-second spot. The numbers are based on a range of agency estimates that can vary depending on the amount of inventory purchased from a network, the inclusion of any nontraditional advertising such as product placements, and the relationship an advertiser and media-buying agency has with a network. Most TV advertising is typically purchased as part of larger negotiations, not on a one-off basis. These estimates also reflect the prices advertisers and networks agreed on in this year's upfront marketplace. Prices likely have changed for those wishing to buy a spot closer to the air date in the so-called "scatter" market.

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	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Fox (Fox Corp.)							
7:00 p.m.	NFL Game **$689,988, 0%**						
7:30							
8:00	The Simpsons **$133,268, -18%**	9-1-1 **$172,215, -1%**	The Resident **$116,988, 8%**	The Masked Singer **$201,683, NA**	Thursday Night Football **$540,090, 24%**	WWE's Smackdown Live **$56,636, NA**	Fox Sports Saturday: College Football **$71,798, 7%**
8:30	Bless the Harts **$102,595, NA**						
9:00	Bob's Burgers **$110,533, 11%**	Prodigal Son **$101,915, NA**	Empire **$171,187, -21%**	Not Just Me **$123,144, NA**			
9:30	Family Guy **$109,015, -9%**						
10:00							
NBC (Comcast Corp. [NBC Universal])							
7:00 p.m.	Football Night in America **$90,907, NA**						
7:30							
8:00	Sunday Night Football **$685,227, 3%**	The Voice **$192,983, -9%**	The Voice **$179,951, -7%**	Chicago Med **$133,216, -18%**	Superstore **$103,159, -3%**	The Blacklist **$78,363, -10%**	Dateline Saturday Night Mystery **$39,259, 7%**
8:30					Perfect Harmony **$107,567, NA**		
9:00			This is Us **$359,413, -17%**	Chicago Fire **$140,834, -5%**	The Good Place **$127,951, 2%**	Dateline **$46,144, -7%**	
9:30					Sunnyside **$79,841, NA**		
10:00		Bluff City Law **$132,288, NA**	New Amsterdam **$172,085, 33%**	Chicago P.D. **$143,082, 10%**	Law & Order: SVU **$108,236, 3%**		Saturday Night Live (encores) **$31,910, -41%**
The CW (AT&T [WarnerMedia]/ViacomCBS)							
7:00 p.m.							
7:30							
8:00	Batwoman **$37,397, NA**	All American **$25,492, -17%**	The Flash **$44,431, -3%**	Riverdale **$32,859, 11%**	Supernatural **$27,497, -7%**	Charmed **$24,292, -2%**	
8:30							
9:00	Supergirl **$27,381, -13%**	Black Lightning **$30,176, -13%**	Arrow **$26,582, 4%**	Nancy Drew **$23,816, NA**	Legacies **$25,432, -6%**	Dynasty **$21,326, 19%**	
9:30							
10:00							

Biggest U.S. TV networks

By 2018 measured-media ad spending. Dollars in millions.

Broadcast TV

1. NBC Comcast Corp. (NBC Universal) **$5,842**

2. CBS ViacomCBS **$4,707**

3. ABC Walt Disney Co. **$3,746**

4. Fox Fox Corp. **$3,289**

5. Univision Univision Holdings **$1,283**

6. Telemundo Comcast Corp. (NBC Universal) **$1,083**

7. The CW AT&T (WarnerMedia)/ViacomCBS **$328**

8. UniMás Univision Holdings **$308**

9. Azteca America HC2 Holdings **$33**

Cable TV

1. ESPN Walt Disney Co. **$2,962**

2. TBS AT&T (WarnerMedia) **$1,910**

3. TNT AT&T (WarnerMedia) **$1,826**

4. HGTV Discovery **$1,457**

5. USA Comcast Corp. (NBC Universal) **$1,337**

6. Food Network Discovery **$1,269**

7. Bravo Comcast Corp. (NBC Universal) **$1,096**

8. Adult Swim, Cartoon Network AT&T (WarnerMedia) **$949**

9. Discovery Channel Discovery **$944**

10. Hallmark Channel Hallmark Cards (Crown Media Family Networks) **$939**

Source: Kantar. More info: kantar.com/media. Totals by TV and cable network shown for calendar 2018 reflect a change in Kantar's national TV spend methodology and are not comparable with earlier years.

Top broadcast and cable telecasts in 2019

Ranked by Live+7 viewership (live and time-shifted viewing within seven days). Super Bowl LIII on CBS last February averaged nearly 99 million viewers (watching live or using time-shifting—DVR—within seven days).

				Live+7	
Rank	Originator	Program	Telecast date	Rating	Average viewership (millions)
1	CBS	Super Bowl LIII	Feb. 3, 2019	32.4	98.8
2	CBS	AFC Championship on CBS	Jan. 20, 2019	17.8	54.4
3	Fox	Fox NFC Playoff (Saturday)	Jan. 12, 2019	11.0	33.7
4	ABC	The Oscars	Feb. 24, 2019	10.0	30.5
5	Fox	Fox NFC Wildcard Game	Jan. 5, 2019	9.7	29.7
6	ESPN	College Football Playoff National Championship	Jan. 7, 2019	8.2	24.9
7	CBS	The Big Bang Theory	May 16, 2019	8.1	24.8
8	NBC	NBC Sunday Night Football	Sept. 29, 2019	7.9	24.4
9	CBS	The World's Best	Feb. 3, 2019	7.7	23.5
10	Fox	Fox World Series (Game 7)	Oct. 30, 2019	7.6	23.3

Source: Nielsen (NNTV Program Report). More info: nielsen.com. Numbers rounded. All broadcast and cable, Dec. 31, 2018, through Nov. 3, 2019. Live+7. Broadcast prime. Persons age 2+. Excludes breakouts, duration less than five minutes and sustainers. Excludes post-gun programming (programming after game ends, when gun sounds signify end of competition).

Incrementality is important, but not all measurement methods quantify true incrementality.

WHICH STATEMENT ABOUT INCREMENTALITY IS FALSE?

1. Incrementality shows the increase in a customer's likelihood to purchase after exposure to marketing.
2. Incrementality pinpoints the amount of lift that marketing provides to the conversion rate.
3. If you can't calculate incrementality, you can't accurately and holistically measure ROI.
4. When measuring incremental lift, you can disregard base sales that occur even without marketing.

neustar Marketing

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NUMBER 4 IS FALSE.

Since incrementality is meant to capture marketing's impact on sales *over-and-above* base sales, the base sales must be included in the calculation.

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Top broadcast and cable TV prime-time shows in 2019

Ranked by Live+7 viewership (live and time-shifted viewing within seven days). "NBC Sunday Night Football" averaged nearly 20 million viewers (watching live or using time-shifting—DVR—within seven days).

				Live+7	
Rank	Originator	Program	Number of telecasts	Rating	Average viewership (millions)
1	NBC	NBC Sunday Night Football	9	6.5	19.9
2	CBS	The Big Bang Theory	13	6.0	18.5
3	CBS	NCIS	19	5.2	15.8
4	HBO	Game of Thrones	6	5.0	15.4
5	Fox	Fox/NFL Network Thursday Night Football	6	5.0	15.4
6	CBS	Young Sheldon	17	4.5	13.7
7	NBC	This Is Us	15	4.1	12.7
8	CBS	FBI	17	4.1	12.4
9	CBS	Blue Bloods	18	4.1	12.4
10	NBC	America's Got Talent: The Champions	7	4.1	12.4

Source: Nielsen (NNTV Program Report). More info: nielsen.com. Numbers rounded. All broadcast and cable, Dec. 31, 2018, through Nov. 3, 2019. Live+7. Broadcast prime. Persons age 2+. Excludes breakouts, specials, repeats, duration less than five minutes, sustainers and programs with fewer than four telecasts. Sample minimums applied.

Top time-shifted broadcast and cable TV shows in 2019

Ranked by incremental audience gained through time shifting. HBO's "Game of Thrones" saw an increase of 9.1 million average viewers from live viewing when accounting for time-shifted viewing occuring over seven days.

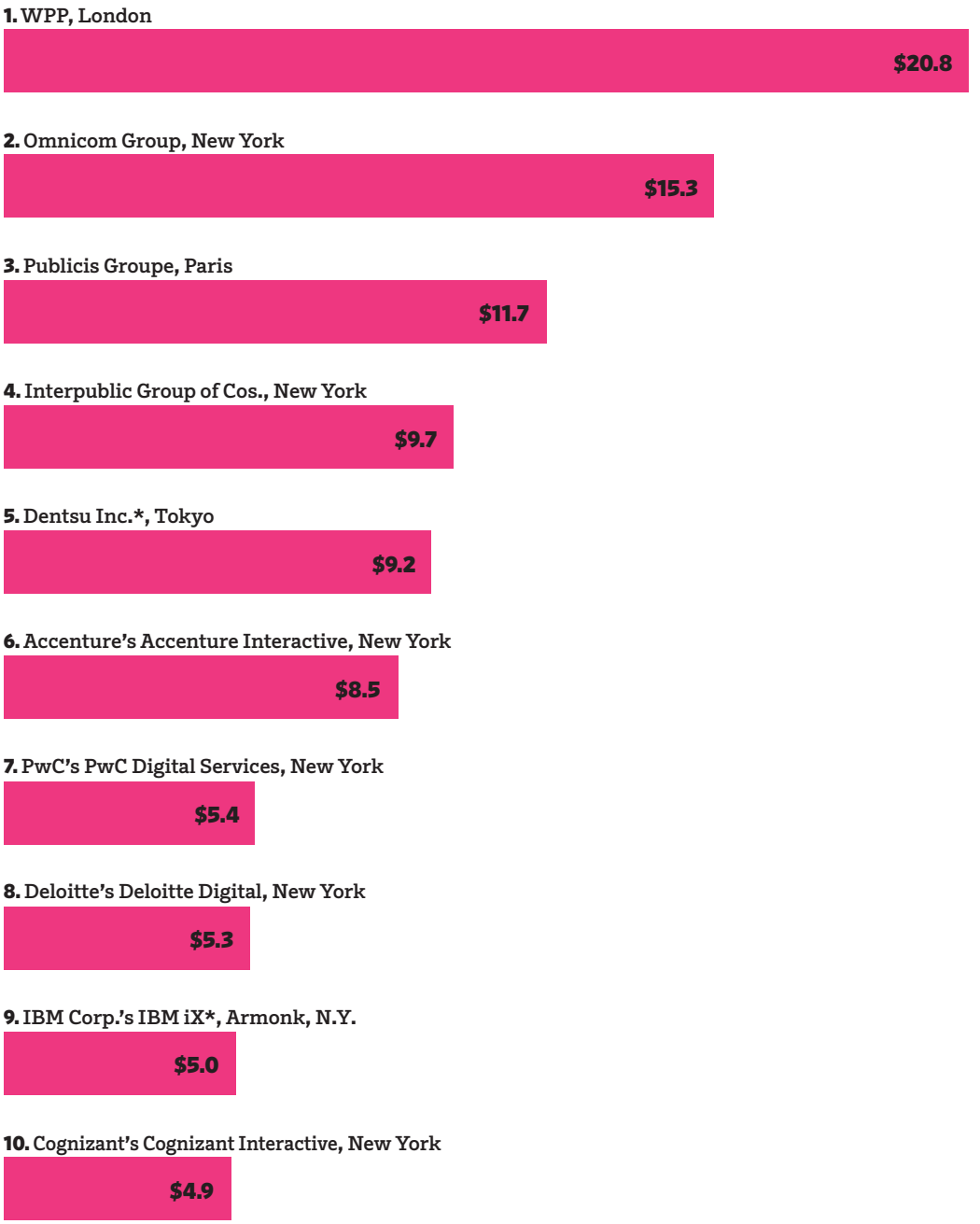
			Live		Live+7		
Rank	Program (originator)	No. of telecasts	Rating	Average viewership (millions)	Rating	Average viewership (millions)	Audience gained through time shifting (millions)
1	Game of Thrones (HBO)	6	2.1	6.3	5.0	15.4	9.1
2	The Big Bang Theory (CBS)	13	3.3	10.0	6.0	18.5	8.5
3	This Is Us (NBC)	15	1.8	5.4	4.1	12.7	7.3
4	The Good Doctor (ABC)	13	1.6	4.8	3.9	12.0	7.2
5	Manifest (NBC)	7	1.4	4.2	3.6	10.9	6.7
6	NCIS (CBS)	19	3.0	9.3	5.2	15.8	6.5
7	New Amsterdam (NBC)	19	1.4	4.2	3.3	10.3	6.1
8	9-1-1 (Fox)	14	1.4	4.3	3.3	10.2	6.0
9	Blue Bloods (CBS)	18	2.2	6.6	4.1	12.4	5.8
10	Young Sheldon (CBS)	17	2.6	8.1	4.5	13.7	5.6

Source: Nielsen (NNTV Program Report). More info: nielsen.com. Numbers rounded. All broadcast and cable, Dec. 31, 2018, through Nov. 3, 2019. Live and Live+7. Broadcast prime. Rank based on absolute difference between Live and Live+7 projections. Persons age 2+. A program must reach at least a 1.0 Live+7 persons 2+ rating. Excludes breakouts, specials, repeats, duration less than five minutes, sustainers and programs with fewer than four telecasts. Sample minimums applied.

AGENCIES

Ad Age Agency Report: World's 10 biggest agency companies

By 2018 worldwide revenue. Dollars in billions.



From Ad Age Agency Report 2019 (April 29, 2019). Detailed rankings and report methodology: AdAge.com/agencyreport2019 and AdAge.com/agencyfamilytrees2019. Source: Ad Age Datacenter. Numbers rounded. Asterisk indicates Ad Age Datacenter estimate.

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More in Ad Age Datacenter
Agency companies: Who owns what
AdAge.com/agencyfamilytrees2019

Ad Age Agency Report: World's biggest agency networks

By 2018 estimated worldwide revenue. Dollars in billions.

Rank	Network	Company	2018 worldwide revenue
1	Accenture Interactive	Accenture	$8.5
2	PwC Digital Services	PwC	5.4
3	Deloitte Digital	Deloitte	5.3
4	IBM iX	IBM Corp.	5.0
5	Cognizant Interactive	Cognizant	4.9
6	BlueFocus (China)	BlueFocus Communication Group	3.3
7	McCann Worldgroup	Interpublic	3.0
8	Wunderman Thompson	WPP	2.8
9	Dentsu Aegis Network	Dentsu	2.7
10	DDB Worldwide Communications Group	Omnicom	2.4
11	Dentsu (Japan)	Dentsu	2.4
12	Publicis Sapient	Publicis	2.2
13	TBWA Worldwide	Omnicom	2.1
14	Ogilvy	WPP	2.0
15	Epsilon-Conversant[1]	Publicis	1.9
16	BBDO Worldwide	Omnicom	1.7
17	Havas Creative Group	Vivendi's Havas	1.7
18	Publicis Worldwide	Publicis	1.6
19	Omnicom Precision Marketing Group	Omnicom	1.6
20	Advantage Marketing Partners	Advantage Solutions	1.5
21	Hakuhodo	Hakuhodo DY Holdings	1.5
22	Leo Burnett Worldwide	Publicis	1.2
23	Williams Lea Tag	Williams Lea Tag	1.2
24	RRD Marketing Solutions	R.R. Donnelley	1.2
25	FCB (Foote, Cone & Belding)	Interpublic	1.1
Ad Age Agency Report: Top 25			$68.3B

From Ad Age Agency Report 2019 (April 29, 2019). Source: Ad Age Datacenter estimates. Numbers rounded. Expanded table and report methodology: AdAge.com/agencyreport2019. 1. Alliance Data Systems sold Epsilon, including Conversant, to Publicis in July 2019.

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Ad Age Agency Report: Biggest worldwide agency ventures by category

By 2018 estimated worldwide revenue. The world's 25 largest agency companies had 2018 worldwide revenue of $117.4 billion.

Category/ largest venture, company	2018 worldwide revenue in category	Category grouping	2018 worldwide revenue for category grouping
Agency company **WPP**	**$20.8 billion**	25 largest agency companies	**$117.4 billion**
Consolidated agency network **Accenture Interactive, Accenture**	**$8.5 billion**	25 largest agency networks	**$68.3 billion**
Digital agency network **Accenture Interactive, Accenture**	**$8.5 billion**	15 largest digital agency networks	**$37.8 billion**
Media agency group **GroupM, WPP**	**$5.9 billion**	Five largest media agency groups	**$20.0 billion**
Media agency network **Mindshare, WPP**	**$1.5 billion**	15 largest media agency networks	**$13.3 billion**
Ad agency **Dentsu, Dentsu**	**$2.4 billion**	10 largest ad agencies	**$13.6 billion**
CRM/direct marketing agency network **Deloitte Digital, Deloitte**	**$2.5 billion**	10 largest CRM/direct marketing agency networks	**$11.2 billion**
Public relations agency network **Edelman, DJE Holdings**	**$888 million**	10 largest public relations agency networks	**$5.1 billion**

From Ad Age Agency Report 2019 (April 29, 2019). Some agencies and networks may have changed names or structure since report was published. Expanded rankings: AdAge.com/agencyreport2019.

Source: Ad Age Datacenter estimates.

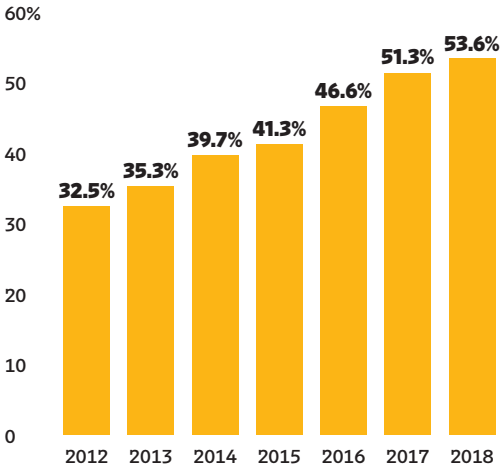
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U.S. agency digital share and revenue growth, 2012-2018

From Agency Reports.

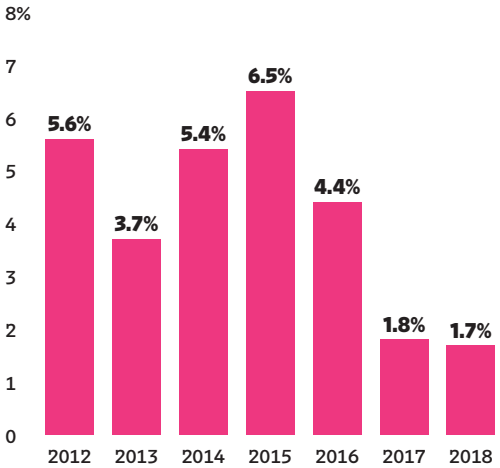
Ad Age Agency Report: Digital share of U.S. agency revenue

Digital work accounted for an estimated 53.6 percent of revenue for U.S. agencies from all disciplines in 2018.



Ad Age Agency Report: U.S. agency revenue growth

Revenue for agencies from all disciplines grew 1.7 percent in 2018, the weakest growth since the ad market recovery began in 2010.



Source: Ad Age Agency Reports. Growth rates based on U.S. agencies from all disciplines.

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Ad Age Agency Report: Biggest U.S. agency ventures by category

By 2018 estimated U.S. revenue. The world's 25 largest agency companies had 2018 U.S. revenue of $52.3 billion.

Category/ largest venture, company	2018 U.S. revenue in category	Category grouping	2018 U.S. revenue for category grouping
Agency company **Omnicom Group**	**$8.0 billion**	World's 25 largest agency companies	**$52.3 billion**
Consolidated agency network **Cognizant Interactive, Cognizant**	**$3.7 billion**	World's 25 largest agency networks	**$31.2 billion**
Agencies from all disciplines **Cognizant Interactive, Cognizant**	**$3.7 billion**	More than 500 U.S. agencies from all disciplines[1]	**$57.1 billion**
Digital agency network **Cognizant Interactive, Cognizant**	**$3.7 billion**	15 largest digital agency networks	**$19.5 billion**
Media agency network **Spark Foundry/Blue 449, Publicis**	**$489 million**	15 largest media agency networks	**$4.3 billion**
Ad agency **BBDO Worldwide, Omnicom**	**$641 million**	25 largest ad agencies	**$6.3 billion**
CRM/direct marketing agency network **Epsilon-Conversant[2], Publicis**	**$1.9 billion**	25 largest CRM/direct marketing agency networks	**$9.1 billion**
Promotion agency network **Advantage Marketing Partners, Advantage Solutions**	**$1.3 billion**	25 largest promotion agency networks	**$4.8 billion**
Experiential/event marketing agency network **Advantage Marketing Partners, Advantage Solutions**	**$1.3 billion**	15 largest experiential/ event marketing agency networks	**$3.0 billion**
Health care agency network **Omnicom Health Group, Omnicom**	**$819 million**	25 largest health care agency networks	**$4.6 billion**
Public relations agency network **Edelman, DJE Holdings**	**$545 million**	25 largest public relations agency networks	**$3.7 billion**
Hispanic-American agency **The Community, Publicis**	**$47 million**	50 largest Hispanic-American agencies	**$518 million**
African-American agency **Burrell Communications Group, Publicis**	**$24 million**	15 largest African-American agencies	**$97 million**
Asian-American agency **Aaaza**	**$18 million**	10 largest Asian-American agencies	**$75 million**

From Ad Age Agency Report 2019 (April 29, 2019). Some agencies and networks may have changed names or structure since report was published. Expanded rankings: AdAge.com/agencyreport2019.

Source: Ad Age Datacenter estimates.

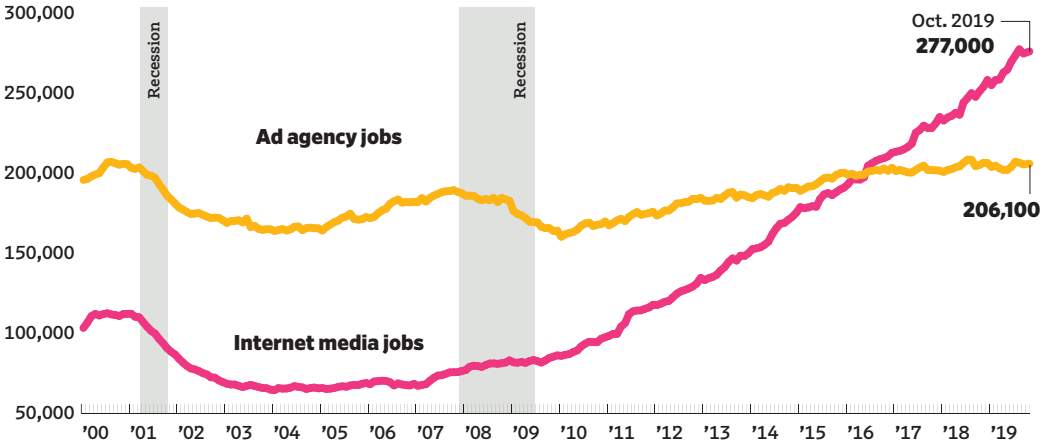
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1. U.S. revenue of more than 500 agencies from all disciplines in Agency Report 2019.
2. Alliance Data Systems Corp. sold Epsilon, including Conversant, to Publicis Groupe in July 2019.

JOBS

U.S. ad agency and internet media employment

Ad agency staffing (206,100 in October 2019) is below the all-time high (208,700) reached in July 2018. Internet media[1] staffing (277,000 in October 2019) has doubled since early 2013.



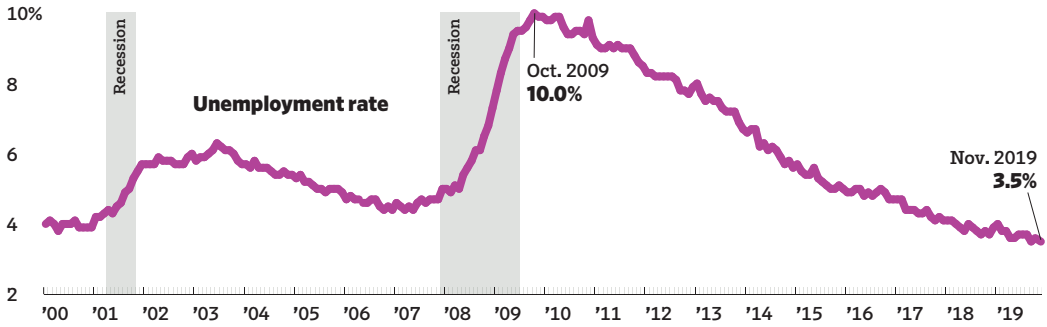
U.S. media employment

Share of media[2] jobs in 2019 vs. 2007 (eve of Great Recession). Internet media's share of media jobs has quadrupled since 2007.

Year	Internet media	TV	Newspaper	Magazine	Radio
2007	8.6%	23.9%	38.8%	16.1%	12.6%
2019	36.4%	24.6%	17.1%	11.1%	10.8%

U.S. unemployment rate

The nation's unemployment rate in November 2019 was 3.5 percent, the lowest level since 1969.



Source: Ad Age Datacenter analysis of Bureau of Labor Statistics data. See expanded data: AdAge.com/adjobs.

1. Internet media businesses and web search portals.
2. Internet media businesses and web search portals, TV, newspaper, magazine, radio. November 2007; October 2019.

Unified Measurement can assign business value to ALL strategic as well as tactical factors that impact marketing performance.

WHICH STATEMENT(S) ABOUT A UNIFIED MEASUREMENT MODEL ARE TRUE?

1. Market- and user-level factors should be accounted for in a single model.
2. Market-level strategic data (from MMM) is integrated as a model factor.
3. All marketing/media channels — including walled gardens and TV — can be measured.

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ALL ARE TRUE!

The Neustar Unified Measurement model uses strategic market-level and tactical user-level factors, resulting in holistic attribution that accounts for incrementality, the key to making smarter marketing investments.

neustar Marketing

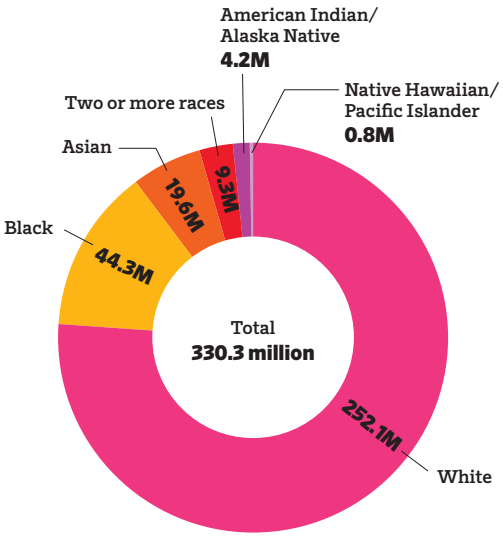
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CONSUMERS

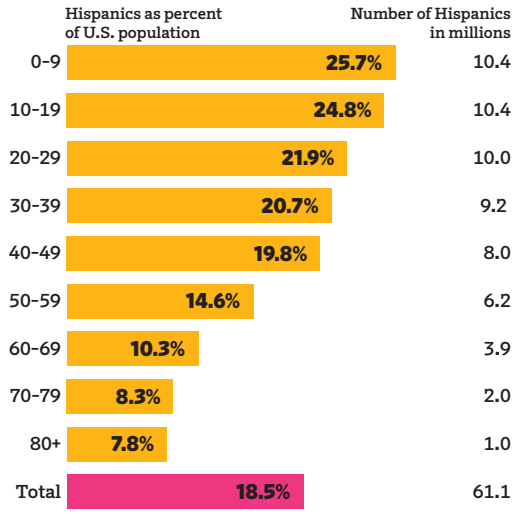
2019 U.S. population by race

Population in millions.



Hispanics' share of population by age in 2019

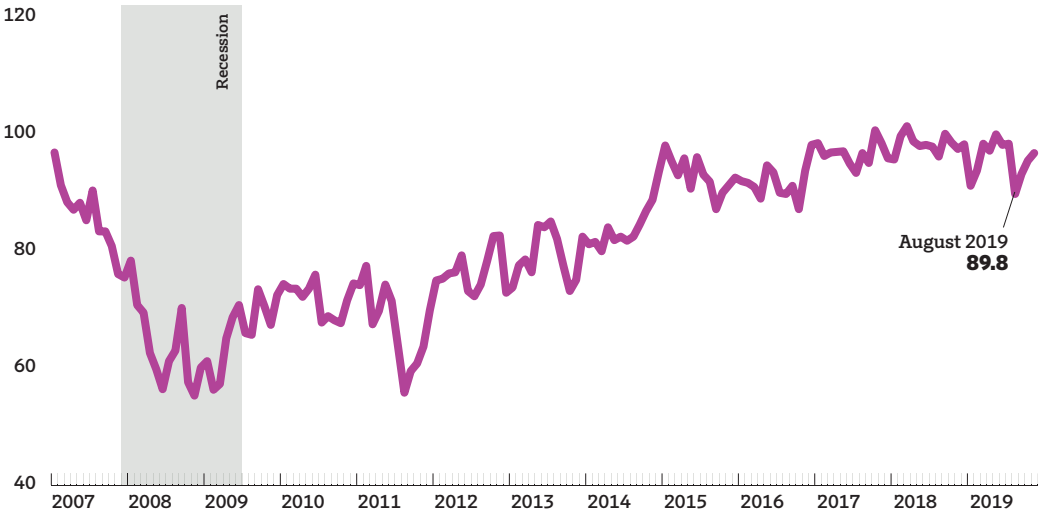
Hispanics account for more than 20 percent of the U.S. population for every age up through age 45.



Source: Census Bureau. Projections for July 1, 2019, from National Population Projections. Numbers rounded. More info: census.gov.

Consumer confidence: Index of consumer sentiment

The University of Michigan index of consumer sentiment has rebounded from a three-year low hit in August 2019. The index in November 2019 came in at 96.8. The university said: "In 30 of the past 35 months the sentiment index was 95.0 or higher, a level of optimism second only to when the index was above 100.0 for 34 out of 36 months from January 1998 to December 2000."



Source: University of Michigan index of consumer sentiment. Graph shows final (that is, not preliminary) readings. Base: 1966 = 100. More info: sca.isr.umich.edu.

How Americans use leisure time

Americans age 15-plus on average had 5.3 hours of leisure time per day in 2018. Watching TV remains by far the No. 1 leisure activity.

	Age									Gender	
	15+	15-19	20-24	25-34	35-44	45-54	55-64	65-74	75+	F	M
Average leisure hours per day in 2018											
All days	5.3	5.8	5.0	4.2	4.1	4.5	5.5	7.2	7.8	4.9	5.7
Weekdays	4.7	5.3	4.3	3.5	3.5	3.8	4.9	6.9	7.6	4.4	5.1
Weekends, holidays	6.6	7.1	6.8	5.8	5.4	6.2	6.9	7.7	8.1	6.1	7.1
Average weekday leisure hours spent in 2018											
Watching TV	2.6	2.0	1.8	1.8	1.9	2.1	3.1	4.2	4.8	2.4	2.8
Socializing and communicating	0.5	0.9	0.4	0.5	0.5	0.5	0.4	0.6	0.4	0.5	0.5
Playing games and computer use for leisure	0.4	0.8	0.8	0.6	0.3	0.2	0.3	0.4	0.4	0.3	0.5
Reading	0.3	0.1	0.1	0.1	0.2	0.2	0.3	0.6	0.8	0.3	0.2
Participating in sports, exercise and recreation	0.3	0.7	NA	0.2	0.2	0.3	0.2	0.3	0.2	0.2	0.3
Relaxing/thinking	0.3	0.2	0.4	0.2	0.2	0.3	0.4	0.4	0.6	0.3	0.4
Other leisure and sports activities[1]	0.4	0.5	NA	0.3	0.3	0.3	0.3	0.4	0.4	0.3	0.4

Source: Bureau of Labor Statistics' 2018 American Time Use Survey. More info: bls.gov/tus. 1. Including travel related to leisure and sports activities.

How TV viewers are multitasking

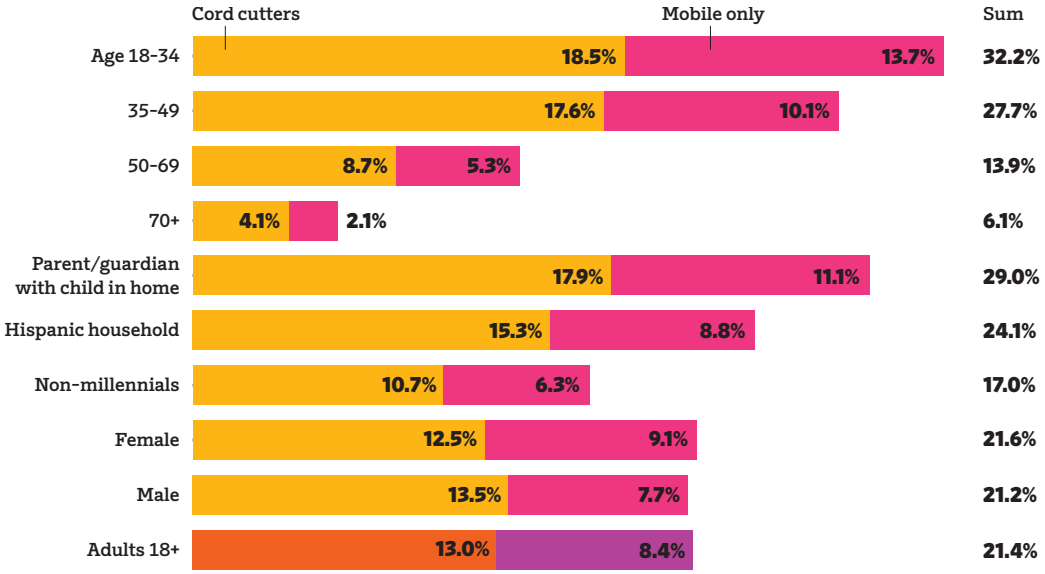
Percent of adults who do these activities while watching TV.

	Very often	Often	Somewhat often	Not very often	Not at all
Visit websites on mobile phone	26.9%	19.4%	19.2%	13.6%	21.0%
Text on mobile phone	26.7	18.8	21.4	17.1	16.0
Visit websites on computer	21.0	16.1	17.0	12.9	33.1
Talk on mobile phone	20.5	13.9	18.2	22.8	24.7
Email on computer	16.6	13.2	15.2	15.5	39.5
Instant message on computer	9.3	6.3	7.3	10.2	66.9
Play video games	8.6	4.8	5.3	6.7	74.5
Listen to radio	8.3	5.4	5.4	7.6	73.3
Watch videos on computer	7.1	5.0	6.4	10.5	70.9
Read magazine or comic	5.5	6.7	9.7	14.9	63.1

Source: MRI-Simmons. Spring 2019 Simmons National Consumer Study, Full Year. Numbers rounded. Base: Study universe. Results based on adult survey participants who answered question (and so results exclude non-responses). More info: mrisimmons.com.

Demographics of cord cutters

Percent of people in various age groups who don't subscribe to a traditional, legacy cable or satellite TV service but have access to online content through the internet at home or through the internet on a mobile device.



Source: MRI-Simmons. Spring 2019 Simmons National Consumer Study, Full Year. Numbers rounded. Base: Study universe. More info: mrisimmons.com. Cord cutters include cord nevers (those who have never paid for TV).

Binge watching

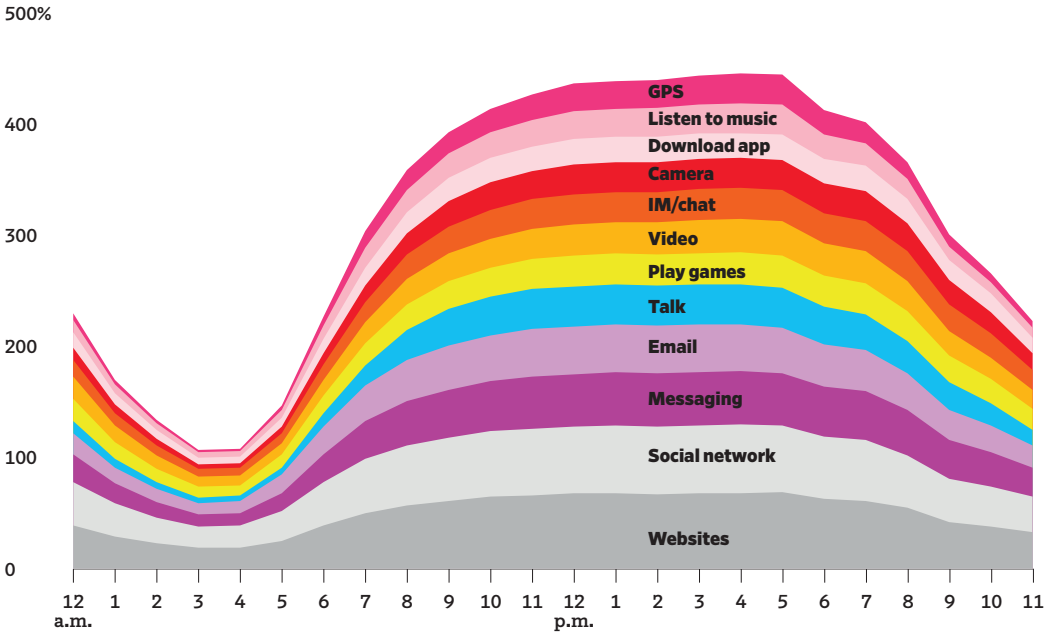
Percent of people in various age groups who binge watch TV series. Among adults age 18 to 34, 63 percent binge watch TV shows weekly or multiple times a week.

	Percent of people in this group that binge watch TV shows					
Group	Multiple times a week	Weekly	More than once a month	Monthly	Less than once a month	Never
Age 18-34	28.8%	34.4%	12.8%	9.9%	12.3%	1.8%
35-49	15.4	16.1	29.1	14.5	22.8	2.0
50-69	4.8	5.5	5.9	9.2	23.6	51.0
70+	1.9	1.7	2.8	2.0	10.1	81.5
Parent/guardian with child in home	21.7	20.7	23.4	10.9	18.7	4.5
Hispanic household	20.0	35.4	13.0	5.4	15.6	10.6
Non-millennials	8.5	9.0	14.4	10.2	21.3	36.7
Female	15.7	15.3	14.2	9.8	17.4	27.6
Male	14.2	19.0	13.5	10.4	19.5	23.5
Adults 18+	14.9%	17.1%	13.9%	10.1%	18.4%	25.6%

Source: MRI-Simmons. Spring 2019 New Media Study. Numbers rounded. Base: Have cable/satellite or streaming service. More info: mrisimmons.com.

When and how smartphone owners use their devices

Accessing websites is the most popular activity on smartphones, followed by social networking. Peak hour for mobile web surfing is 5 p.m., when 69 percent of adult smartphone owners use their phones to visit a website.



Source: MRI-Simmons. Spring 2019 Connect Plus Study. Base: Smartphone users. Percentages indicate unduplicated aggregate percentage of smartphone owners who engage in the activity in that hour at least once during a typical week. For example, 69 percent of smartphone owners use their phone's web browser to access a website between 5 p.m. and 6 p.m. at least once in a week. More info: mrisimmons.com.

U.S. households rich to poor: Income distribution[1]

Share of aggregate income by household-income quintiles. The bottom group had 3.1 percent of 2018 income.

Year	Lowest 20%	Second	Third	Fourth	Top 20%
1980	4.2%	10.2%	16.8%	24.7%	44.1%
1990	3.8	9.6	15.9	24.0	46.6
2000	3.6	8.9	14.8	23.0	49.8
2010	3.3	8.5	14.6	23.4	50.3
2018	3.1	8.3	14.1	22.6	52.0

U.S. households rich to poor: Mean income[2]

By 2018 household-income quintile; change vs. prerecession 2007. Poor households have not fully recovered.

	All households	Lowest 20%	Second	Third	Fourth	Top 20%
2018	$90,021	$13,775	$37,293	$63,572	$101,570	$233,895
Percent change vs. 2007	9.7%	-1.8%	4.3%	4.8%	5.8%	14.7%

Source: Census Bureau's Current Population Survey (Annual Social and Economic Supplements). More info: census.gov.
1. Numbers rounded. 2. Percent change based on real (inflation-adjusted) mean income. Great Recession began in December 2007 and ended in June 2009.

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