

Ad Age

\$1T
2018 worldwide media
and marketing spending,
topping trillion mark

38 percent
Internet's projected share
of U.S. ad spending in
2018, bigger than TV

MARKETING FACT PACK 2018

198,500
U.S. ad agency
employment, lowest
level in two years

\$1,354
U.S. media and
marketing spending
per person in 2018

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CRAIN



What Will You Do to Get Closer to Your Customers in 2018?

The new year is a time to reflect, repair and refresh. What kind of brand do you want to be in 2018? What will you do differently to better serve your customers? Will you be customer obsessed?

For over 20 years, Neustar has helped our clients grow and guard their business with the most complete understanding of how to connect people, places and things using identity resolution.

Neustar believes the secret to dazzling, customer-obsessed marketing is identity. You can't serve your customers if you don't truly know them. If you don't get identity right, your people-based marketing will be wrong.

Neustar Marketing Solutions. Powered by Identity.



Data Onboarding | IDMP | Customer Intelligence | Audience Targeting | Measurement | Analytics

The Big List ⁴

10 key stats

Procter & Gamble is world's biggest advertiser. Comcast is top U.S. spender

Marketers ⁶

Ad spending: Forecasts through 2020

U.S. and worldwide media spending growth

Biggest advertisers

In the U.S. and worldwide

U.S. market leaders

Ad spending and share figures

Ad spending: 2018 breakouts

U.S. and worldwide media and marketing-services spending

Media ¹⁶

Share of U.S. ad spending by medium

Including mobile's share of internet ad spending

Cost for a 30-second commercial

Football is priciest spot for ads

Biggest TV networks and programs

Ad spending and audience ratings

Digital media platforms and properties

Share of digital media time by platform. Unique visitors for top properties

Agencies ²⁴

World's largest agency companies and networks

WPP is biggest company. Accenture Interactive tops the network chart

Biggest agency ventures by category

Companies, networks and agencies

U.S. agency growth rates

Revenue for U.S. agencies from all disciplines grew 4.4 percent in 2016

Digital's share of agency revenue

Digital accounted for nearly 47 percent of agencies' 2016 U.S. revenue

Consumers ²⁸

Population and consumer confidence

Demographics and consumer sentiment

How consumers watch TV

Binge watching. Multitasking. Cord cutters

Jobs ³⁴

U.S. ad agency and internet media employment

Ad agency staffing is at a two-year low

Media employment

Internet media's share of media jobs has more than tripled since 2007

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World's Largest Advertisers

Rankings. Database (profiles, agency rosters, executives, spending)

AdAge.com/globalmarketers2017

Leading National Advertisers

Rankings. Database (profiles, brands, agency rosters, executives, spending)

AdAge.com/lna2017

AdAge.com/marketertrees2017

Agency Report

Rankings. Database (companies, networks, agencies)

AdAge.com/agencyreport2017

AdAge.com/agencyfamilytrees2017

Marketing Fact Pack 2018

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THE BIG LIST

10 key stats on the world of marketers, media and agencies

1. Procter & Gamble Co.

World's biggest advertiser

\$10.5 BILLION

Ad and marketing spending in year ended June 2017

2. Comcast Corp.

Nation's biggest advertiser

\$5.6 BILLION

2016 U.S. ad, marketing and promotion spending

3. Billion dollar spenders

Marketers with 2016 worldwide ad spending of at least \$1 billion

98

4. Geico

Most-advertised U.S. brand

\$1.4 BILLION

2016 measured-media spending

5. Media spending

2018 world forecast

\$558 BILLION

+4.3 PERCENT

2018 U.S. forecast

\$204 BILLION

+3.3 PERCENT

6. Internet ad spending

2018 world forecast

\$203 BILLION

+11.3 PERCENT

2018 U.S. forecast

\$78 BILLION

+13.1 PERCENT

7. Google

Biggest U.S. digital media property

247 MILLION

Unique visitors in October 2017 (all Google sites)

8. TV

Time spent watching TV in 2016, Americans age 15+

2.5 HOURS A DAY

9. WPP

World's biggest agency company

\$19.4 BILLION

2016 revenue

10. Accenture Interactive

World's biggest agency network

\$4.4 BILLION

2016 revenue



***“Our ability
to reach
consumers is
intimate and
therefore a
privilege.”***

DENISE KARKOS
CMO
TD Ameritrade

WHAT WILL YOU DO TO GET CLOSER TO YOUR CUSTOMERS IN 2018?

“At TD Ameritrade, we strive to deliver a “high tech, right touch” client approach across all channels. The only way to truly do this well is to build the right CRM strategy, systems and processes. This is no small feat and we’re early in our journey, but we are driven to keep up with the benefits that technology provides. If we can tackle the operational pieces, then we believe it’s a dream playground for today’s marketer. Because that’s where the art of our craft comes in. We invest a tremendous amount in research to ensure we stay close to consumer sentiment as it evolves. We understand our role in a consumer’s life and must respect when and how we show up. Our ability to reach consumers is intimate and therefore a privilege. We want to earn trust by communicating one to one and with heightened relevance.”

MARKETERS

U.S. and worldwide media advertising growth rates

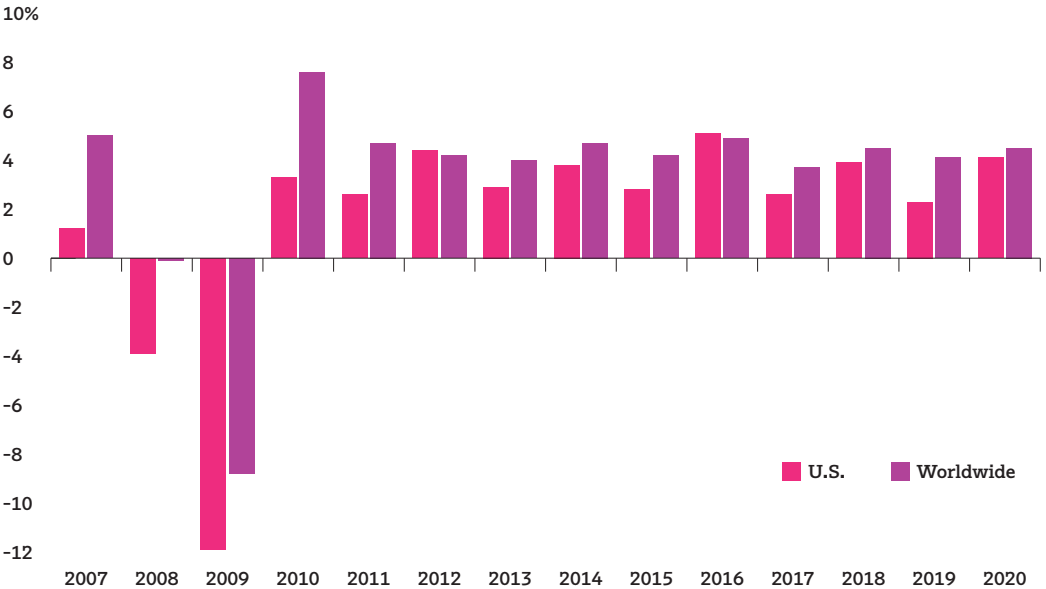
Percent change in ad spending, 2013-2020.

Forecasts and revised historic data. The average of GroupM, Magna and Zenith forecasts suggests U.S. ad spending growth of 3.9 percent in 2018, up from 2.6 percent in 2017. Consensus for worldwide ad spending: +4.5 percent in 2018 vs. +3.7 percent in 2017.

	2013	2014	2015	2016	2017	2018	2019	2020
U.S.								
GroupM (WPP)	2.4%	3.1%	1.8%	3.2%	2.2%	3.4%	-	-
Magna (Interpublic)	2.4	3.3	2.9	7.7	2.1	5.0	1.6%	4.7%
Zenith (Publicis)	3.8	4.9	3.6	4.4	3.5	3.3	2.9	3.4
Average of GroupM, Magna and Zenith	2.9%	3.8%	2.8%	5.1%	2.6%	3.9%	2.3%	4.1%
Worldwide								
GroupM	3.9	3.8	3.7	3.9	3.1	4.3	4.5	4.6
Magna	3.9	4.9	4.3	6.0	4.1	5.2	3.6	4.9
Zenith	4.3	5.3	4.6	4.7	4.0	4.1	4.2	4.1
Average of GroupM, Magna and Zenith	4.0%	4.7%	4.2%	4.9%	3.7%	4.5%	4.1%	4.5%

Ad spending growth: U.S. and worldwide

Average of GroupM, Magna and Zenith forecasts, 2007-2020.



Source: December 2017 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. U.S. averages for 2019 and 2020 based on average of Magna and Zenith. More info: groupm.com, magnaglobal.com, zenithmedia.com.

10 most-advertised brands

Based on 2016 U.S. measured-media ad spending.

1. Geico

Berkshire Hathaway
2016 vs. 2015:
19%

\$1.4
billion

\$773
million

6. McDonald's

McDonald's Corp.
-5%

2. Verizon

Verizon
Communications
-9%

\$1.1
billion

\$750
million

7. Apple

Apple
23%

3. Chevrolet

General Motors Co.
19%

\$926
million

\$743
million

8. Toyota

Toyota Motor Corp.
32%

4. AT&T

AT&T
-28%

\$905
million

\$741
million

9. T-Mobile

Deutsche Telekom
(T-Mobile US)
-2%

5. Ford

Ford Motor Co.
13%

\$892
million

\$733
million

10. Samsung

Samsung
Electronics Co.
14%

From 200 Leading National Advertisers 2017 (June 26, 2017). See ranking of nation's 200 most-advertised brands: AdAge.com/Ina2017.

Source: Ad Age Datacenter analysis of measured-media data from WPP's Kantar Media. More info: kantarmedia.com.

Methodology: AdAge.com/aboutIna2017. Company's measured-media spending for all goods and services that fall under a given brand. Numbers rounded.

25 biggest U.S. advertisers

Ranked by 2016 total U.S. advertising spending. Dollars in millions.

Rank	Marketer	Headquarters	2016 total U.S. ad spending	2016 U.S. measured-media spending
1	Comcast Corp.	Philadelphia	\$5,618	\$1,726
2	Procter & Gamble Co.	Cincinnati	4,312	2,489
3	General Motors Co.	Detroit	3,769	1,807
4	AT&T	Dallas	3,600	1,592
5	Nestlé	Vevey, Switzerland	2,754	722
6	Verizon Communications	New York	2,744	1,281
7	American Express Co.	New York	2,742	469
8	Amazon	Seattle	2,637	921
9	Ford Motor Co.	Dearborn, Mich.	2,342	1,250
10	JPMorgan Chase & Co.	New York	2,233	345
11	Walmart Stores	Bentonville, Ark.	2,175	658
12	Fiat Chrysler Automobiles	London	2,166	1,087
13	Pfizer	New York	2,138	1,740
14	Samsung Electronics Co.	Suwon, South Korea	2,136	774
15	Toyota Motor Corp.	Toyota City, Japan	1,998	1,194
16	Walt Disney Co.	Burbank, Calif.	1,998	768
17	Berkshire Hathaway	Omaha, Neb.	1,932	1,847
18	Johnson & Johnson	New Brunswick, N.J.	1,929	1,176
19	Anheuser-Busch InBev	Leuven, Belgium	1,923	718
20	L'Oréal	Clichy, France	1,923	1,288
21	Alphabet (Google)	Mountain View, Calif.	1,833	406
22	Capital One Financial Corp.	McLean, Va.	1,714	420
23	Deutsche Telekom (T-Mobile US)	Bonn, Germany	1,700	1,112
24	21st Century Fox	New York	1,678	630
25	Expedia	Bellevue, Wash.	1,550	759
Total for the 25 (dollars in billions)			\$61.5	\$27.2

From 200 Leading National Advertisers 2017 (June 26, 2017). See expanded data at AdAge.com/lna2017. See 200 Leading National Advertisers database including profiles, agency rosters and executives: AdAge.com/marketertrees2017.

Source: Ad Age Datacenter. Total U.S. advertising spending is Ad Age estimate. U.S. measured-media spending from WPP's Kantar Media. Numbers rounded. More info: kantarmedia.com. Methodology: AdAge.com/aboutlna2017.

1. Comcast: Ad Age revised spending model to capture estimated U.S. spending based on Comcast's "advertising, marketing and promotion" spending classification.

2. Procter & Gamble: Pro forma excluding beauty products (sold to Coty in October 2016).

4. AT&T: Signed deal in October 2016 to buy No. 28 Time Warner.

5. Nestlé: Ad Age revised spending model to capture estimated U.S. spending based on Nestlé "consumer facing" marketing expenses classification.

8. Amazon: Ad Age revised spending model to capture estimated U.S. spending based on Amazon's "advertising and other promotional costs."

World's 25 biggest advertisers

Ranked by 2016 total worldwide advertising spending. Dollars in billions.

Rank	Marketer	Headquarters	2016 total worldwide advertising spending
1	Procter & Gamble Co.	U.S.	\$10.5
2	Samsung Electronics Co.	South Korea	9.9
3	Nestlé	Switzerland	9.2
4	Unilever	U.K./Netherlands	8.6
5	L'Oréal	France	8.3
6	Volkswagen	Germany	6.7
7	Comcast Corp.	U.S.	6.1
8	Anheuser-Busch InBev	Belgium	5.9
9	General Motors Co.	U.S.	5.3
10	Daimler	Germany	5.1
11	Amazon	U.S.	5.0
12	LVMH Moët Hennessy Louis Vuitton	France	4.7
13	Ford Motor Co.	U.S.	4.3
14	Toyota Motor Corp.	Japan	4.2
15	Coca-Cola Co.	U.S.	4.0
16	Fiat Chrysler Automobiles	U.K.	3.9
17	Alphabet (Google)	U.S.	3.9
18	Priceline Group	U.S.	3.8
19	AT&T	U.S.	3.8
20	American Express Co.	U.S.	3.7
21	Mars Inc.	U.S.	3.5
22	McDonald's Corp.	U.S.	3.4
23	Sony Corp.	Japan	3.4
24	Bayer	Germany	3.3
25	Pfizer	U.S.	3.2
	World's Largest Advertisers: Top 25		\$133.5
	World's Largest Advertisers: Top 100		\$267.3

From World's Largest Advertisers (Dec. 4, 2017). See full report including ranking of top 100, profiles and expanded footnotes: AdAge.com/globalmarketers2017.

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

1. Procter & Gamble: Year ended June 2017.

2. Samsung: Ad Age revised spending model to capture advertising and sales promotion.

3. Nestlé: Ad Age revised spending model to capture estimated spending based on Nestlé "consumer facing" marketing expenses classification.

8. Anheuser-Busch InBev: Estimated pro forma spending including SABMiller (acquired October 2016).

22. McDonald's: Estimated worldwide systemwide ad spending including spending from franchisees and company-owned restaurants.

U.S. market leaders by category

2016 share and ad spending breakouts for marketers and brands. Dollars in millions.

Auto marketers

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

	Marketer	Market share	Total U.S. ad spending
1	General Motors Co.	17.3%	\$3,769
2	Ford Motor Co.	14.8	2,342
3	Toyota Motor Corp.	14.0	1,998
4	Fiat Chrysler Automobiles	12.9	2,166
5	Honda Motor Co.	9.3	1,375
6	Nissan Motor Co.	8.9	1,191
7	Hyundai Motor Co.	4.4	544
8	Kia Motors Corp.	3.7	671
9	Subaru Corp.	3.5	487
10	Volkswagen	3.4	912
Top 10		92.2	\$15,454
Industry total (vehicles sold in millions)		17.6	NA

Retailers

Ranking based on total U.S. ad spending.

	Marketer	Share of U.S. retail sales	Total U.S. ad spending
1	Amazon	2.2%	\$2,637
2	Walmart Stores	11.1	2,175
3	Macy's	0.8	1,547
4	Target Corp.	2.1	1,503
5	Kohl's Corp.	0.6	1,164
6	Home Depot	2.6	874
7	Lowe's Cos.	1.7	842
8	J.C. Penney Co.	0.4	795
9	Kroger Co.	3.5	717
10	Sears Holdings Corp.	0.7	684
Top 10		25.7	\$12,938
Industry total (U.S. sales, dollars in trillions)		\$3.3	NA

Auto brands

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

	Brand/marketer	Market share	Measured media
1	Ford Ford Motor Co.	14.2%	\$892
2	Toyota Toyota Motor Corp.	12.0	743
3	Chevrolet General Motors Co.	11.9	926
4	Honda Honda Motor Co.	8.4	475
5	Nissan Nissan Motor Co.	8.1	655
6	Jeep Fiat Chrysler Automobiles	5.3	332
7	Hyundai Hyundai Motor Co.	4.4	286
8	Kia Kia Motors Corp.	3.7	336
9	Subaru Subaru Corp.	3.5	310
10	GMC General Motors Co.	3.1	306
Top 10		74.6	5,260
Industry total (vehicles sold in millions)		17.6	\$9,103


Restaurant chains

U.S. market share based on systemwide sales.

	Chain/marketer	Market share	Measured media
1	McDonald's McDonald's Corp.	7.0%	\$773
2	Starbucks Starbucks Corp.	2.8	63
3	Subway Doctor's Associates	2.2	434
4	Burger King Restaurant Brands International	1.8	375
5	Taco Bell Yum Brands	1.8	376
6	Wendy's Wendy's Co.	1.7	240
7	Dunkin' Donuts Dunkin' Brands Group	1.6	151
8	Chick-fil-A Chick-fil-A	1.3	63
9	Pizza Hut Yum Brands	1.1	210
10	Domino's Domino's Pizza	1.0	303
Top 10		22.3	2,987
Industry total (*U.S. sales, dollars in billions)		\$521.9*	\$6,303

From Ad Age's 200 Leading National Advertisers 2017 (June 26, 2017). Numbers rounded. Expanded footnotes and source information: AdAge.com/lna2017. Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from WPP's Kantar Media. More info: kantarmedia.com. Methodology: AdAge.com/aboutlna2017.

Auto marketers, auto brands: Automotive News Data Center (market share, sales). 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 2017 Top 500 Chain Restaurant Report (sales used to calculate market share). More info: technomic.com. Burger King, Chick-fil-A, Domino's, Starbucks and Wendy's based on estimated sales.

A portrait of Fiona Carter, a woman with long blonde hair, wearing a black top with a large bow at the neck. She is smiling and looking towards the camera. The background is a light-colored wall with a subtle geometric pattern.

**“...their story
is our story.
It’s a shared
journey.”**

FIONA CARTER
Chief Brand Officer
AT&T

WHAT WILL YOU DO TO GET CLOSER TO YOUR CUSTOMERS IN 2018?

“Our customers are diverse, dynamic and driven. They have great stories to tell and we want to reflect them in how we communicate. We strive to create deeper emotional connections because *their* story is *our* story. It’s a shared journey. As a top advertiser, we can lead by example. One way we’re doing that is by accurately portraying women and girls. We’re working to create ads free of unconscious bias, as participants in the industry’s #SeeHer initiative. And guess what? It’s not just the right thing to do, it drives results. We score each of our ads with Gender Equality Measures. Based on our research, top-scoring ads have 17% more brand recall and 13% more consideration than low-scoring ads. Another way we’re connecting with our customers’ stories is through a collaboration with Tribeca Film Festival. Together, we launched *Untold Stories* to help underrepresented filmmakers’ projects be created, distributed and seen. We gave \$1 million to the winner, Faraday Okoro. His film, *Nigerian Prince*, will debut at the 2018 festival and will be featured on our video platforms. We’ll also pick the next winning filmmaker at the festival. There are great stories out there and we want to share as many as we can.”

U.S. market leaders by category

2016 share and ad spending breakouts for marketers and brands. Dollars in millions.

Personal care brands

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

	Brand/marketer	Share of ad spend	Measured media
1	L'Oréal Paris L'Oréal	7.4%	\$455
2	Maybelline New York L'Oréal	4.5	278
3	Olay Procter & Gamble Co.	3.5	215
4	Neutrogena Johnson & Johnson	3.4	207
5	Garnier L'Oréal	3.3	204
6	Crest Procter & Gamble Co.	2.8	176
7	Dove Unilever	2.6	160
8	Pampers Procter & Gamble Co.	2.3	143
9	Gillette Procter & Gamble Co.	2.2	134
10	CoverGirl Coty	2.1	130
Top 10		34.0	2,102
Total personal care measured-media spending		100%	\$6,182

Prescription drug brands

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

	Brand/marketer	Share of ad spend	Measured media
1	Humira AbbVie	7.0%	\$426
2	Lyrica Pfizer	6.4	389
3	Eliquis Bristol-Myers Squibb Co.	4.9	298
4	Xeljanz Pfizer	4.2	255
5	Opdivo Bristol-Myers Squibb Co.	2.7	166
6	Chantix Pfizer	2.6	156
7	Cialis Eli Lilly & Co.	2.4	148
8	Viagra Pfizer	2.4	146
9	Cosentyx Novartis	2.4	144
10	Trulicity Eli Lilly & Co.	2.3	141
Top 10		37.2	2,268
Total prescription drug measured-media spending		100%	\$6,097

Household product brands

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

	Brand/marketer	Share of ad spend	Measured media
1	Tide Procter & Gamble Co.	10.4%	\$197
2	Downy Procter & Gamble Co.	6.0	112
3	Febreze Procter & Gamble Co.	5.7	108
4	Clorox Clorox Co.	5.5	104
5	OxiClean Church & Dwight Co.	4.4	84
6	Charmin Procter & Gamble Co.	3.8	73
7	Bounty Procter & Gamble Co.	3.8	72
8	Gain Procter & Gamble Co.	3.5	65
9	Swiffer Procter & Gamble Co.	3.2	60
10	Energizer Energizer Holdings	2.9	55
Top 10		49.3	931
Total household product measured-media spending		100%	\$1,887

Wireless services

U.S. market share for wireless service providers.

	Marketer	Market share	Measured media
1	AT&T	32.1%	\$763
2	Verizon Communications	31.8	898
3	Deutsche Telekom (T-Mobile US)	16.0	1,035
4	SoftBank Group Corp. (Sprint Corp.)	12.4	676
5	América Móvil (TracFone Wireless)	5.0	289
6	Telephone and Data Systems (U.S. Cellular)	1.4	39
Top 6		98.7	3,699
All other		1.3	1,510
Industry total (subscribers in millions)		395.9	\$5,209

From Ad Age's 200 Leading National Advertisers 2017 (June 26, 2017). Numbers rounded. Expanded footnotes and source information: AdAge.com/lna2017. Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from WPP's Kantar Media. More info: kantarmedia.com. Methodology: AdAge.com/aboutlna2017.

Personal care, household products, prescription drug brands: Ad Age Datacenter analysis of U.S. measured-media spending. Wireless services: U.S. network operator market share from comScore MobilLens for subscribers age 13+, three months ended December 2016. Estimated wireless subscriber connections at year end from CTIA. More info: comscore.com/MobilLensPlus; ctia.org.

Insurance brands

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

	Brand/marketer	Share of ad spend	Measured media
1	Geico Berkshire Hathaway	23.9%	\$1,353
2	State Farm State Farm Mutual Auto Insurance Co.	11.1	629
3	Progressive Progressive Corp.	9.3	528
4	Liberty Mutual Liberty Mutual Insurance Co.	6.6	374
5	Allstate Allstate Corp.	5.4	307
6	Nationwide Nationwide Mutual Insurance Co.	4.5	255
7	UnitedHealthcare UnitedHealth Group	3.4	193
8	USAA United Services Automobile Association	2.6	149
9	Farmers Insurance Zurich Insurance Group	2.4	138
10	The General American Family Mutual Insurance Co.	2.2	127
Top 10		71.7	4,054
Total insurance industry measured-media spending		100%	\$5,651

Beer marketers

U.S. market share based on shipment volume.

	Marketer	Market share	Measured media
1	Anheuser-Busch InBev	42.7%	\$716
2	Molson Coors Brewing Co.	24.6	437
3	Constellation Brands	8.3	225
4	Heineken	3.9	162
5	Pabst Brewing Co.	2.4	1
6	Boston Beer Co.	1.8	50
7	D.G. Yuengling & Son	1.3	2
8	Florida Ice and Farm Co. (North American Breweries)	1.1	3
9	Diageo	1.0	18
10	Mark Anthony Group (Mike's Hard Lemonade)	0.8	2
Top 10		88.0	1,615
Industry total (barrels in millions)		217.1	\$1,654

Credit cards

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

	Marketer	Market share	Measured media
1	American Express Co.	22.1%	\$326
2	JPMorgan Chase & Co. (Chase)	19.3	123
3	Bank of America Corp.	10.2	92
4	Citigroup (Citibank)	9.4	151
5	Capital One Financial Corp.	7.9	250
6	U.S. Bancorp (U.S. Bank)	4.0	1
7	Discover Financial Services	4.0	118
8	Wells Fargo & Co.	3.9	8
9	Barclays	2.3	28
10	Synchrony Financial	1.6	5
Top 10		84.5	1,102
Industry total (*purchase volume, dollars in trillions)		\$31*	\$1,451

Beverage brands

U.S. market share based on sales volume.

	Brand/marketer	Market share	Measured media
1	Coke Coca-Cola Co.	12.0%	\$355
2	Pepsi PepsiCo	5.6	192
3	Mountain Dew PepsiCo	4.1	81
4	Dr Pepper Dr Pepper Snapple Group	3.5	102
5	Nestlé Pure Life Nestlé	3.3	2
6	Gatorade PepsiCo	3.3	147
7	Sprite Coca-Cola Co.	2.7	32
8	Poland Spring Nestlé	2.5	0
9	Dasani Coca-Cola Co.	2.3	8
10	Aquafina PepsiCo	1.8	17
Top 10		41.2	936
Industry total (gallons in billions)		32.9	\$1,862

From Ad Age's 200 Leading National Advertisers 2017 (June 26, 2017). Numbers rounded. Expanded footnotes and source information: AdAge.com/lna2017. Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from WPP's Kantar Media. More info: kantarmedia.com. Methodology: AdAge.com/aboutlna2017.

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. U.S. measured-media spending for marketers' beer brands. **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.

Zenith's 2018 U.S. spending forecast: \$446 billion

Estimated U.S. spending in media and marketing services. Zenith says U.S. internet ad spending passed TV in 2017, making internet the biggest ad medium. Zenith forecasts media ad spending to grow 3.3 percent to \$204 billion in 2018. It expects 2018 total media and marketing-services spending to reach a record \$446 billion—\$1,354 per person in the U.S.

	Spending (dollars in billions)			Year-to-year percent change		
	2018	2017	2016	2018 vs. 2017	2017 vs. 2016	2016 vs. 2015
Media						
Internet	\$78.3	\$69.2	\$60.4	13.1%	14.6%	16.9%
TV	68.2	68.5	68.1	-0.4	0.5	2.1
Radio	17.6	17.6	17.6	0.0	0.0	0.0
Newspaper	15.1	16.6	18.3	-9.0	-9.0	-8.0
Magazine	14.3	15.4	16.6	-6.9	-7.4	-4.8
Outdoor and cinema	10.5	10.2	9.8	3.2	4.1	4.1
Total: Media	204.0	197.5	190.8	3.3	3.5	4.4
Marketing services						
Sales promotion	82.7	79.9	77.2	3.5	3.5	3.5
Telemarketing	59.6	57.9	56.2	3.0	3.0	3.0
Direct mail	45.8	46.9	49.2	-2.5	-4.7	-1.1
Event sponsorship	39.9	37.4	35.0	6.8	6.8	7.4
Directories	8.0	8.0	8.1	-0.4	-0.4	-0.6
Public relations	5.7	5.3	5.0	7.0	7.0	7.4
Total: Marketing services	241.7	235.4	230.7	2.6	2.1	2.8
Total: Media and marketing services	\$445.7	\$432.9	\$421.5	3.0%	2.7%	3.6%

Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2017). Numbers rounded. More info: zenithmedia.com.

U.S. measured-media spending by medium in 2016

From Kantar Media for all advertisers and 200 Leading National Advertisers. Dollars in billions.

Rank	Medium	Measured-media spending		
		All advertisers (including 200 LNA)	200 Leading National Advertisers	200 LNA's share
1	TV	\$78.9	\$50.3	63.7%
2	Internet	31.9	9.3	29.1
3	Magazine	18.8	8.3	44.1
4	Newspaper	12.2	2.6	21.6
5	Radio	7.9	2.9	36.6
6	Outdoor and cinema	5.6	1.4	24.3
	Total	\$155.4	\$74.7	48.1%

From 200 Leading National Advertisers 2017 (June 26, 2017). See full report and expanded version of this table: AdAge.com/lna2017. See 200 LNA database including profiles, agency rosters and executives: AdAge.com/marketertrees2017. Methodology: AdAge.com/aboutlna2017.

Source: Ad Age Datacenter. Numbers rounded. Measured-media spending from WPP's Kantar Media. More info: kantarmedia.com.

1. TV: Broadcast, cable, spot, syndicated; includes Spanish-language networks. **2. Internet:** Paid search, internet display; excludes video. **3. Magazine:** Consumer, Sunday, business-to-business and local magazine; includes Spanish-language magazines. **4. Newspaper:** National and local newspaper; free-standing inserts; includes Spanish-language newspapers. **5. Radio:** Network, national spot and local. **6. Outdoor and cinema:** Includes outdoor and cinema for total U.S. (all advertisers); 200 LNA is outdoor without cinema.

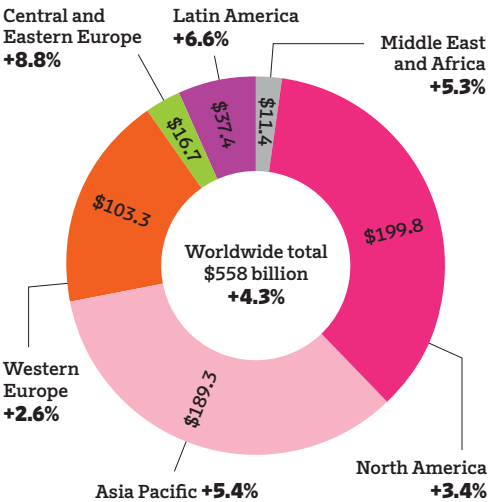
GroupM's 2018 worldwide spending forecast: \$1 trillion

Estimated worldwide spending in media and marketing services. GroupM forecasts that 2018 spending on media and marketing services for the first time will top \$1 trillion—\$138 per person. Media spending in 2018 will account for 54 percent of worldwide media and marketing services spending, according to GroupM; marketing services will capture 46 percent.

	Spending (dollars in billions)			Year-to-year percent change		
	2018	2017	2016	2018 vs. 2017	2017 vs. 2016	2016 vs. 2015
Media						
Internet	\$202.8	\$182.3	\$163.5	11.3%	11.5%	15.7%
TV	217.1	212.4	211.5	2.2	0.4	0.9
Radio	23.7	23.3	22.7	2.0	2.4	1.7
Newspaper	45.0	47.5	50.9	-5.2	-6.7	-8.8
Magazine	32.9	34.8	37.2	-5.3	-6.6	-4.9
Outdoor and cinema	36.4	34.5	32.7	5.6	5.4	6.0
Total: Media	558.0	534.8	518.6	4.3	3.1	3.9
Marketing services						
Direct	345.5	331.3	320.7	4.3	3.3	4.2
Sponsorship	65.7	62.8	60.1	4.6	4.5	4.5
Data investment management (market research)	45.9	45.1	44.7	1.9	0.7	0.9
Public relations	13.5	12.9	12.5	4.1	3.8	2.7
Health care	5.1	5.0	4.9	2.0	2.0	0.4
Total: Marketing services	475.6	457.1	442.9	4.1	3.2	3.8
Total: Media and marketing services	\$1,033.6	\$991.9	\$961.4	4.2%	3.2%	3.9%

Worldwide ad spending by region from GroupM

Media spending in 2018 and percent change vs. 2017. Dollars in billions.



World's five largest ad markets from GroupM

Media spending forecast by country for 2018. The U.S., home to 4.4 percent of the world population, will account for more than one-third of 2018 worldwide ad spending. China, home to about 19 percent of the world population, is forecast to account for about 16 percent of ad spending.

	Country	2018 spending (\$ in billions)	2018 vs. 2017 % change	Share of world
1	U.S.	\$189.1	3.4%	33.9%
2	China	88.2	5.2	15.8
3	Japan	43.8	3.0	7.8
4	U.K.	26.1	4.8	4.7
5	Brazil	20.7	2.4	3.7
Top five		367.9	3.8	65.9
Worldwide total		\$558.0	4.3%	100%

Source: WPP's GroupM (This Year, Last Year, December 2017). Numbers rounded. More info: groupm.com.

MEDIA

Share of U.S. ad spending by medium

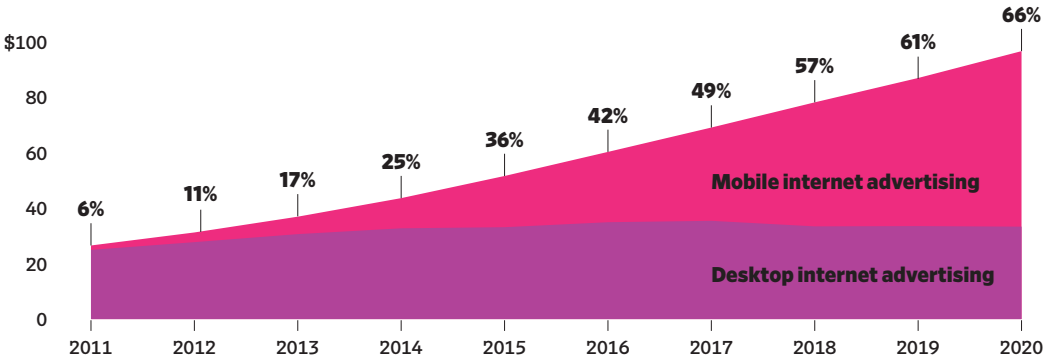
From Zenith. The internet in 2017 passed TV to become the biggest U.S. ad medium, according to the media agency's forecast.

Year	Internet	TV	Radio	Magazine	Newspaper	Out of home
2000	3.8%	33.4%	13.3%	15.3%	31.1%	3.1%
2001	4.5	33.8	12.8	14.6	31.1	3.3
2002	4.8	34.5	13.0	14.0	30.3	3.5
2003	5.1	33.9	12.9	14.3	30.4	3.5
2004	5.4	34.4	12.6	14.1	30.1	3.5
2005	6.0	33.3	12.4	14.4	30.2	3.7
2006	6.4	33.6	12.0	14.3	29.7	3.9
2007	8.2	33.0	11.9	14.5	28.1	4.3
2008	10.7	33.9	11.3	13.9	25.8	4.5
2009	14.0	35.4	11.1	12.5	22.2	4.9
2010	15.5	37.1	10.5	12.3	19.5	5.0
2011	17.2	37.5	10.6	12.0	17.5	5.2
2012	19.4	38.6	10.3	11.1	15.4	5.1
2013	22.0	38.3	10.2	10.7	13.7	5.2
2014	24.8	38.0	9.9	10.1	12.1	5.1
2015	28.3	36.5	9.6	9.5	10.9	5.2
2016	31.7	35.7	9.2	8.7	9.6	5.1
2017	35.1	34.7	8.9	7.8	8.4	5.2

Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2017). More info: zenithmedia.com. Numbers rounded. Internet including internet display, online video (including rich media), classified, paid search, internet radio, podcasts and social media for desktop and mobile. Out of home including outdoor and cinema.

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 nearly two-thirds of internet ad spending in 2020.



Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2017). Numbers rounded. Includes desktop and mobile classified, display, paid search, podcast, radio, social media and video. More info: zenithmedia.com.

***“...we will
help clients
reimagine
their
business...”***

LISA DONOHUE
CEO
Publicis Spine



WHAT WILL YOU DO TO GET CLOSER TO YOUR CUSTOMERS IN 2018?

“All clients across all categories are grappling with category and consumer disruption and the need to not only transform their marketing approaches, but their enterprise business infrastructure as well. We are working with our client partners to deliver on both these fronts and, importantly, linking the two through our Publicis Spine offering, to drive end-to-end transformation. By unifying our unique data assets and over 3,500 engineers, analysts and strategists as well as offering our proprietary Publicis PeopleCloud platform to identify and convert sources of brand growth, we will help clients reimagine their business and their consumers’ journey to the sale of a product or service—ultimately bringing them closer to their customers and unlocking new growth opportunities.”

Cost for a 30-second commercial

Ad Age's annual show-by-show guide to the price of TV commercials. Reflects fall 2017 schedule.
Percent change vs. fall 2016 prices.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
ABC (Walt Disney Co.)							
7:00 p.m.	America's Funniest Home Videos \$57,874, -7%						
7:30							
8:00	To Tell the Truth \$69,038, NA American Idol* \$191,999, NA	Dancing with the Stars \$139,448, 11% The Bachelor* \$139,629, NA	The Middle \$127,810, 2%	The Goldbergs \$160,193, 11%	Grey's Anatomy \$213,576, -11%	Once Upon a Time \$81,105, NA	Saturday Night Football \$97,004, 11%
8:30			Fresh off the Boat \$119,589, 18%	Speechless \$139,556, 2%			
9:00	Shark Tank \$100,559, 1%		Black-ish \$134,639, -3%	Modern Family \$239,782, 7%	Scandal \$194,482, NA	Marvel's Inhumans \$96,770, NA; Marvel's Agents of S.H.I.E.L.D. \$94,921, -12%	
9:30			The Mayor \$117,791, NA	American Housewife \$129,083, 36%			
10:00	Ten Days in the Valley \$116,849, NA	The Good Doctor \$125,678, NA	Kevin (Probably) Saves the World \$83,783, NA	Designated Survivor \$174,572, 7%	How to Get Away with Murder \$164,984, -8%	20/20 \$63,400, -20%	
CBS (CBS Corp.)							
7:00 p.m.	60 Minutes \$124,250, 7%						
7:30							
8:00	Wisdom of the Crowd \$106,566, NA	Kevin Can Wait \$120,531, -25%; The Big Bang Theory \$285,908, -1%	NCIS \$139,792, -9%	Survivor \$141,880, 10%	The Big Bang Theory \$285,908, -1%; NFL Thursday Night Football \$549,791, 5%	MacGyver \$76,143, 5%	Crimetime Saturday \$26,495, 8%
8:30		9JKL \$132,231, NA			Young Sheldon \$180,393, NA		
9:00	NCIS: Los Angeles \$116,268, 8%	Kevin Can Wait \$120,531, -25%	Bull \$128,768, -5%	Seal Team \$134,251, NA	Mom \$122,318, 1%	Hawaii Five-0 \$87,302, 14%	Crimetime Saturday \$29,773, NA
9:30		Me, Myself & I \$118,955, NA; Superior Donuts \$110,245, NA			Life in Pieces \$117,624, -17%		
10:00	Madam Secretary \$82,653, -19%	Scorpion \$124,674, 13%	NCIS: New Orleans \$98,451, 2%	Criminal Minds \$115,505, -9%	S.W.A.T. \$121,586, NA	Blue Bloods \$83,319, 12%	48 Hours \$36,383, 17%

From "TV's most expensive ads: Brands pay for football and tears" (AdAge.com, Oct. 2, 2017). Networks may have made some changes to schedules since then. *Midseason

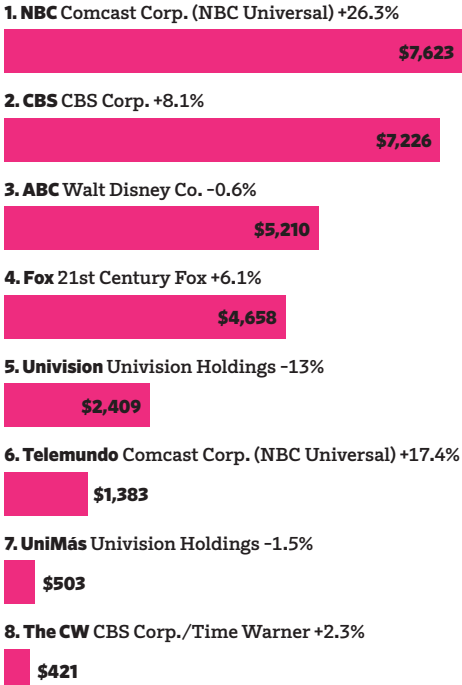
Source: Ad Age. Based on data compiled by Ad Age from as many as eight agencies. The resulting prices should be viewed as directional indicators and are not the actual price that every advertiser pays for a 30-second spot. Numbers are based on a range of agency estimates that can vary depending on the amount of inventory purchased from a network, the inclusion of any nontraditional advertising such as product placements, and relationships an advertiser and media buying agency have with a network. Most TV advertising typically is 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.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Fox (21st Century Fox)							
7:00 p.m.							
7:30	Bob's Burger \$75,333, 14%						
8:00	The Simpsons \$140,699, -13%	Lucifer \$120,579, -5%	Lethal Weapon \$132,331, -23%	Empire \$305,369, -30%	Gotham \$88,796, -32%	Hell's Kitchen \$94,507, 20%	Fox Sports Saturday: College Football \$82,599, NA
8:30	Ghosted \$125,179, NA						
9:00	Family Guy \$139,295, 5%	The Gifted \$133,724, NA	The Mick \$106,396, NA	Star \$150,262, NA	The Orville \$90,590, NA	The Exorcist \$50,546, -3%	
9:30	The Last Man on Earth \$93,848, 0%		Brooklyn Nine-Nine \$94,034, -7%				
10:00							
NBC (Comcast Corp. [NBC Universal])							
7:00 p.m.	Football Night in America \$83,565, NA						
7:30							
8:00	Sunday Night Football \$699,602, 4%	The Voice (Monday) \$259,180, 21%	The Voice (Tuesday) \$229,956, 13%	The Blacklist \$114,957, -21%	Superstore \$112,811, 29%; Thursday Night Football \$550,709, 13%	Blindspot \$90,846, -33%	Dateline Mystery \$41,742, 7%
8:30					The Good Place \$115,667, 23%		
9:00	Ellen's Game of Games \$124,061, NA		This Is Us \$394,428, 45%	Law & Order: SVU \$112,324, -23%	Will & Grace \$211,856, NA	Taken \$77,839, NA	Saturday Night Live Encores \$32,919, 4%
9:30					Great News \$129,793, NA		
10:00	Shades of Blue \$117,018, NA	The Brave \$129,452, NA	Law & Order True Crime: Menendez Murders \$153,556, NA; Chicago Med* \$134,463, -1%	Chicago P.D. \$139,869, 17%	Chicago Fire \$138,698, -15%	Dateline NBC \$52,871, -1%	
The CW (CBS Corp./Time Warner)							
8:00 p.m.		Supergirl \$50,511, -8%	The Flash \$62,425, 3%	Riverdale \$32,831, NA	Supernatural \$34,430, 22%	Crazy Ex-Girlfriend \$14,371, 0%	
8:30							
9:00		Valor \$35,863, NA	DC's Legends of Tomorrow \$37,525, 1%	Dynasty \$38,251, NA	Arrow \$37,453, -7%	Jane the Virgin \$21,143, -16%	

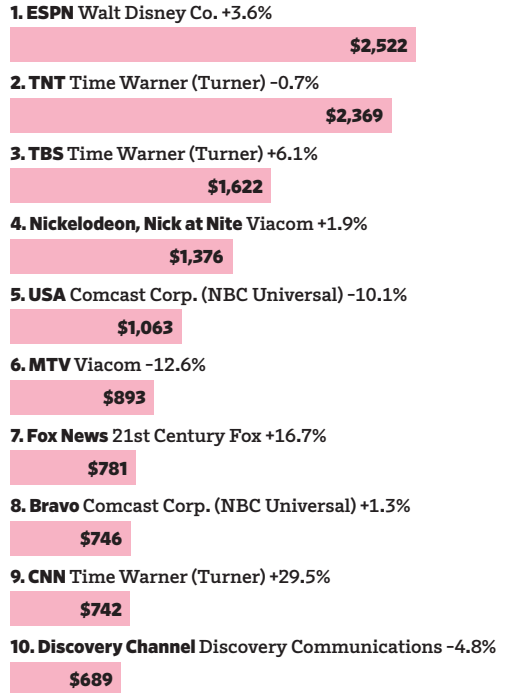
Biggest U.S. TV networks

By 2016 measured-media ad spending. Dollars in millions.

Broadcast TV



Cable TV



Source: Kantar Media. More info: kantarmedia.com. AT&T in October 2016 signed deal to buy Time Warner. Discovery Communications in July 2017 signed deal to buy Scripps Networks, whose brands include HGTV and Food Network.

Top broadcast and cable telecasts in 2017

Ranked by Live+7 viewership (live and time-shifted viewing within seven days). Fox's Super Bowl telecast averaged 112 million viewers who watched live or through time-shifted viewing within seven days.

Rank	Originator	Program	Telecast date	Live+7	
				Rating	Average viewership (millions)
1	Fox	Fox Super Bowl LI	Feb. 5, 2017	37.1	112.0
2	Fox	Fox Super Bowl Post Game	Feb. 5, 2017	20.4	61.5
3	CBS	AFC Championship on CBS	Jan. 22, 2017	15.9	48.1
4	NBC	NBC NFL Playoff Game	Jan. 15, 2017	12.4	37.3
5	ABC	The Oscars	Feb. 26, 2017	11.3	34.2
6	CBS	AFC Divisional Playoff	Jan. 14, 2017	10.0	30.0
7	Fox	Fox World Series (Game 7)	Nov. 1, 2017	9.3	28.4
8	CBS	Grammy Awards	Feb. 12, 2017	9.2	27.6
9	NBC	NBC NFL Playoff Game	Jan. 7, 2017	9.0	27.0
10	ABC	NBA Finals on ABC (Game 5)	June 12, 2017	8.2	24.9

Source: Nielsen (NNTV Program Report). More info: nielsen.com. Numbers rounded. All broadcast and cable, Jan. 1, 2017, through Nov. 5, 2017. 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 signifies end of competition).

Top broadcast and cable TV prime-time shows in 2017

Ranked by Live+7 viewership (live and time-shifted viewing within seven days). "The Big Bang Theory" on CBS averaged 18.5 million viewers who watched live or through time-shifted viewing within seven days.

Rank	Originator	Program	Number of telecasts	Live+7	
				Rating	Average viewership (millions)
1	CBS	The Big Bang Theory	19	6.1	18.5
2	NBC	NBC Sunday Night Football	10	6.1	18.4
3	ABC	The Good Doctor	6	5.8	17.8
4	CBS	NCIS	20	5.9	17.7
5	NBC	This Is Us	14	5.4	16.5
6	NBC	America's Got Talent (Tuesday)	16	5.3	16.0
7	Fox	Fox NFL Sunday Post Game National	6	5.2	15.8
8	AMC	The Walking Dead	11	5.0	15.1
9	NBC	America's Got Talent (Wednesday)	6	4.8	14.7
10	CBS	Bull	20	4.8	14.4

Source: Nielsen (NNTV Program Report). More info: nielsen.com. Numbers rounded. All broadcast and cable, Jan. 1, 2017, through Nov. 5, 2017. Live+7. Broadcast prime. Persons age 2+. Excludes breakouts, specials, repeats, duration less than five minutes, sustainers and programs with less than four telecasts. Sample minimums applied.

Top time-shifted broadcast and cable TV shows in 2017

Ranked by incremental audience gained through time shifting. The TV viewing audience of AMC's "The Walking Dead" increased by about 9 million viewers from the live audience through time-shifted viewing within seven days.

Rank	Program	No. of telecasts	Live		Live+7		Audience gained through time shifting (millions)
			Rating	Average viewership (millions)	Rating	Average viewership (millions)	
1	The Walking Dead	11	2.0	6.0	5.0	15.1	9.1
2	The Good Doctor	6	2.9	8.8	5.8	17.8	9.0
3	This Is Us	14	2.5	7.5	5.4	16.5	8.9
4	Game of Thrones	7	1.7	5.0	4.6	13.7	8.8
5	The Big Bang Theory	19	3.3	10.0	6.1	18.5	8.5
6	Designated Survivor	17	1.2	3.7	3.4	10.2	6.5
7	NCIS	20	3.7	11.2	5.9	17.7	6.5
8	Will & Grace	6	1.7	5.1	3.7	11.2	6.2
9	America's Got Talent (Tuesday)	16	3.4	10.2	5.3	16.0	5.8
10	Grey's Anatomy	20	1.8	5.4	3.7	11.2	5.8

Source: Nielsen (NNTV Program Report). More info: nielsen.com. Numbers rounded. All broadcast and cable, Jan. 1, 2017, through Nov. 5, 2017. 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 less than four telecasts. Sample minimums applied.

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

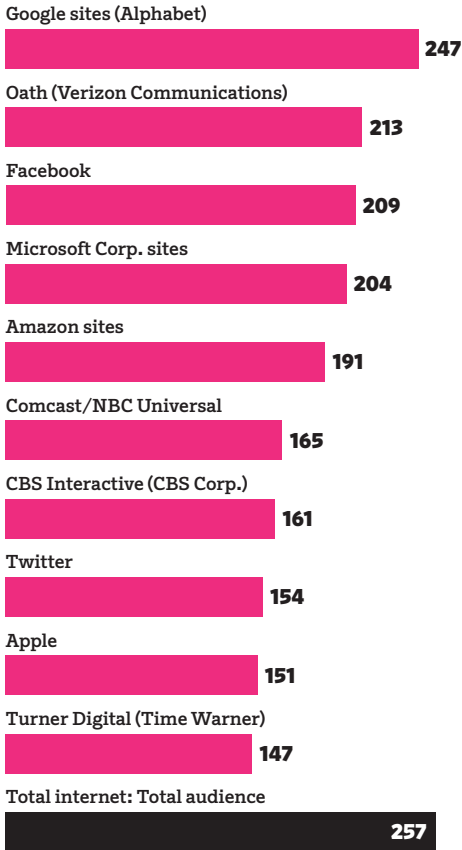
From October 2017. Smartphone apps are the digital platform of choice for young adults.

Age	Smartphone app	Desktop	Smartphone web	Tablet app	Tablet web
18-24	63.1%	23.0%	6.7%	6.4%	0.7%
25-34	55.9	29.8	7.5	5.4	1.4
35-44	56.2	28.1	7.3	6.8	1.6
45-54	52.6	31.9	7.0	6.6	2.0
55-64	51.7	26.6	8.7	10.0	3.0
65+	29.4	48.5	6.5	12.1	3.6
Adults: 18+	53.7%	29.7%	7.4%	7.3%	1.9%

Source: comScore, October 2017. Numbers rounded. More info: comscore.com.

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

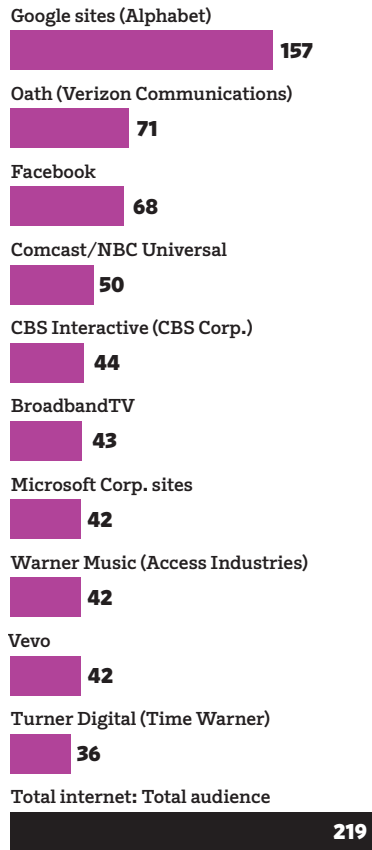
By October 2017 unique visitors in millions.



Source: comScore, October 2017. Numbers rounded. More info: comscore.com. Verizon's Oath includes AOL (acquired in 2015) and Yahoo's operating business (acquired in 2017). AT&T in October 2016 signed deal to buy Time Warner.

Digital: 10 largest U.S. desktop online video properties

By October 2017 unique visitors in millions.



Source: comScore, October 2017. Numbers rounded. More info: comscore.com. Alphabet's Google includes YouTube. Verizon's Oath includes AOL (acquired in 2015) and Yahoo's operating business (acquired in 2017). AT&T in October 2016 signed deal to buy Time Warner.

*“For eBay,
individuality
is the core
essence of
the brand.”*

SUZY DEERING
CMO
eBay



WHAT WILL YOU DO TO GET CLOSER TO YOUR CUSTOMERS IN 2018?

“For eBay, individuality is the core essence of the brand. I’m excited that we’ll be able to continue to highlight individuality and express it through all aspects of eBay’s marketing, which will show the vibrant and tailored shopping experiences available on eBay.

At eBay, our customers are of utmost importance. With our customer-focused approach, we’ll be connecting our brand to every aspect of the product experience. And we’ll continue to double-down on mobile by creating more shoppable and engaging mobile content, while also gathering insight on how and what shoppers are looking for. Like our shoppers, we are excited about the possibilities!”

AGENCIES

World's 10 largest agency companies

By worldwide revenue in 2016. Dollars in billions.

1. WPP, London



2. Omnicom Group, New York



3. Publicis Groupe, Paris



4. Interpublic Group of Cos., New York



5. Dentsu Inc.*, Tokyo



6. Accenture's Accenture Interactive, New York



7. PwC's PwC Digital Services, New York



8. IBM Corp.'s IBM iX*, Armonk, N.Y.



9. Deloitte's Deloitte Digital, New York



10. Vivendi's Havas*, Puteaux, France



From Agency Report 2017 (May 1, 2017). Detailed rankings and report methodology: AdAge.com/agencyfamilytrees2017. Numbers rounded. Asterisk indicates Ad Age Datacenter estimate.

World's largest agency networks

By 2016 estimated worldwide revenue. Dollars in billions.

Rank	Network	Company	2016 worldwide revenue
1	Accenture Interactive	Accenture	\$4.4
2	Young & Rubicam Group	WPP	3.6
3	PwC Digital Services	PwC	3.3
4	McCann Worldgroup	Interpublic	3.2
5	IBM iX	IBM	3.0
6	BBDO Worldwide	Omnicom	2.6
7	Deloitte Digital	Deloitte	2.6
8	Publicis.Sapient	Publicis	2.4
9	Dentsu (Japan)	Dentsu	2.4
10	DDB Worldwide Communications Group	Omnicom	2.3
11	Dentsu Aegis Network	Dentsu	2.3
12	Epsilon	Alliance Data Systems Corp.	2.2
13	Ogilvy	WPP	2.1
14	TBWA Worldwide	Omnicom	2.0
15	Publicis Worldwide	Publicis	1.8
16	Havas Creative Group	Vivendi's Havas	1.6
17	BlueFocus (China)	BlueFocus Communication Group	1.5
18	J. Walter Thompson Co.	WPP	1.5
19	FCB	Interpublic	1.4
20	Hakuhodo	Hakuhodo DY Holdings	1.3
21	Leo Burnett Worldwide	Publicis	1.2
22	Omnicom Health Group	Omnicom	1.0
23	Publicis Health	Publicis	0.9
24	Edelman	DJE Holdings	0.9
25	Acxiom Corp.	Acxiom Corp.	0.9
Total for top 25			\$52.3

From Agency Report 2017 (May 1, 2017). Expanded table and report methodology: AdAge.com/agencyreport2017.

Biggest worldwide agency ventures by category

By 2016 estimated worldwide revenue. The world's 25 largest agency companies had 2016 worldwide revenue of \$90.9 billion.

Category/ largest venture, company	2016 worldwide revenue in category	Category grouping	2016 worldwide revenue for category grouping
Agency company WPP	\$19.4 billion	25 largest agency companies	\$90.9 billion
Consolidated agency network Accenture Interactive, Accenture	\$4.4 billion	25 largest agency networks	\$52.3 billion
Digital agency network Accenture Interactive, Accenture	\$4.4 billion	10 largest digital agency networks	\$19.5 billion
Media agency group GroupM, WPP	\$5.3 billion	Five largest media agency groups	\$16.7 billion
Media agency network Mindshare Worldwide, WPP	\$1.3 billion	10 largest media agency networks	\$10.0 billion
Advertising agency Dentsu, Dentsu	\$2.4 billion	10 largest ad agencies	\$14.3 billion
CRM/direct marketing agency network Epsilon, Alliance Data Systems	\$2.0 billion	10 largest CRM/direct marketing agency networks	\$9.5 billion
Public relations agency network Edelman, DJE Holdings	\$875 million	10 largest public relations agency networks	\$4.8 billion

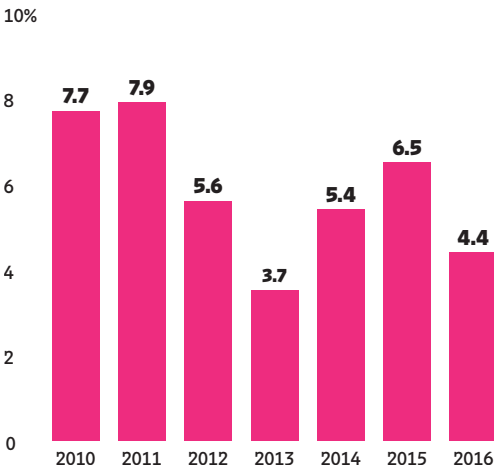
From Agency Report 2017 (May 1, 2017). Some agencies and networks have changed names or structure since report was published. Expanded rankings: AdAge.com/agencyreport2017. Source: Ad Age Datacenter estimates.

U.S. agency revenue growth and digital share: 2010-2016

From Agency Reports.

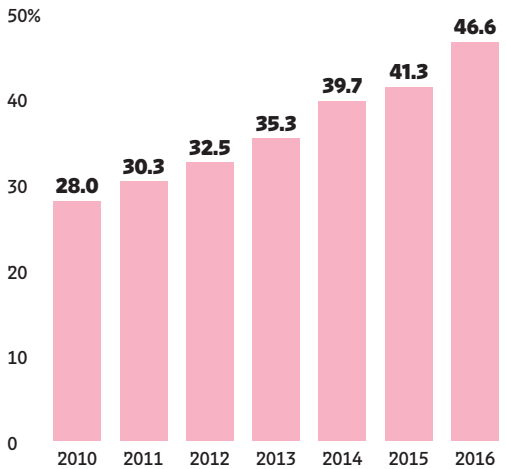
U.S. agency revenue growth

U.S. revenue for agencies from all disciplines grew 4.4 percent in 2016.



Digital share of U.S. agency revenue

Digital's share of revenue for U.S. agencies from all disciplines reached 46.6 percent in 2016.



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

Biggest U.S. agency ventures by category

By 2016 estimated U.S. revenue. The world's 25 largest agency companies had 2016 U.S. revenue of \$40.6 billion.

Category/ largest venture, company	2016 U.S. revenue in category	Category grouping	2016 U.S. revenue for category grouping
Agency company Omnicom Group	\$8.6 billion	World's 25 largest agency companies	\$40.6 billion
Consolidated agency network Epsilon¹, Alliance Data Systems	\$2.1 billion	World's 25 largest agency networks	\$23.6 billion
Agencies from all disciplines Epsilon², Alliance Data Systems	\$1.9 billion	Nearly 700 U.S. agencies from all disciplines ³	\$48.3 billion
Digital agency network Accenture Interactive, Accenture	\$1.7 billion	50 largest digital agency networks	\$17.0 billion
Search marketing Performics, Publicis	\$180 million	25 largest search marketing agencies	\$1.4 billion
Mobile marketing Epsilon, Alliance Data Systems	\$227 million	25 largest mobile marketing agencies	\$1.6 billion
Media agency network Starcom, Publicis	\$371 million	15 largest media agency networks	\$3.5 billion
Advertising agency BBDO Worldwide, Omnicom	\$626 million	25 largest ad agencies	\$6.6 billion
CRM/direct marketing agency network Epsilon⁴, Alliance Data Systems	\$1.9 billion	25 largest CRM/direct marketing agency networks	\$8.2 billion
Health care agency network Omnicom Health Group, Omnicom	\$809 million	50 largest health care agency networks	\$5.1 billion
Promotion agency network Advantage Marketing Partners, Advantage Solutions	\$639 million	50 largest promotion agency networks	\$4.4 billion
Experiential/event marketing agency network Advantage Marketing Partners, Advantage Solutions	\$639 million	15 largest experiential/event marketing agency networks	\$2.6 billion
Public relations agency network Edelman, DJE Holdings	\$533 million	25 largest public relations agency networks	\$3.7 billion
Hispanic-American Alma, Omnicom	\$36 million	50 largest Hispanic-American agencies	\$552 million
African-American Burrell Communications Group, Publicis	\$21 million	15 largest African-American agencies	\$118 million
Asian-American AdAsia Communications	\$16 million	15 largest Asian-American agencies	\$103 million

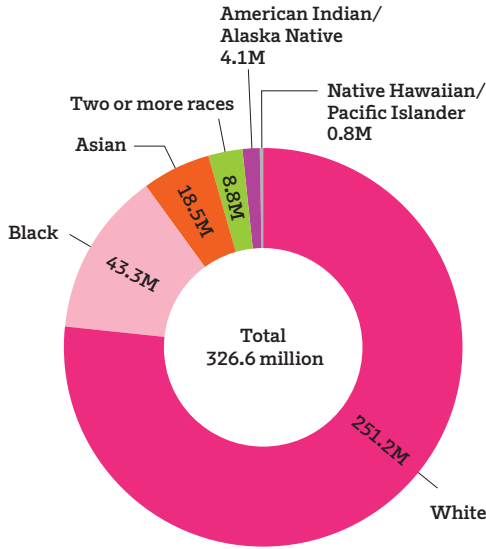
From Agency Report 2017 (May 1, 2017). Some agencies and networks have changed names or structure since report was published. Expanded rankings: AdAge.com/agencyreport2017. Source: Ad Age Datacenter estimates.

1. Consolidated agency network revenue. 2. Agency revenue. 3. Revenue of nearly 700 agencies from all disciplines in Agency Report 2017. 4. CRM/direct marketing agency network revenue.

CONSUMERS

2017 U.S. population by race

Population in millions.



Source: Census Bureau. Projections for July 2017 from national projections released in December 2014. Numbers rounded. More info: census.gov.

Hispanics' share of population by age in 2017

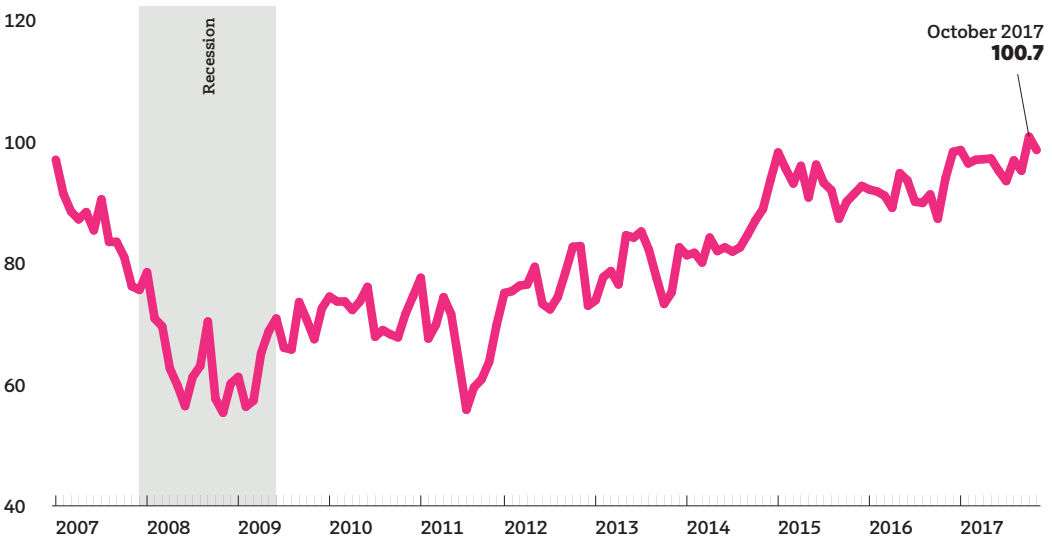
Hispanics account for more than 20 percent of the U.S. population for every age up through age 43.

Age	Hispanics as percent of U.S. population	Number of Hispanics in millions
0-9	25.7%	10.4
10-19	24.0	10.1
20-29	21.7	9.9
30-39	21.0	9.1
40-49	19.2	7.8
50-59	13.5	5.9
60-69	9.7	3.6
70+	7.9	2.7
Total	18.2%	59.5


Source: Census Bureau. Projections for July 2017 from national projections released in December 2014. Numbers rounded. More info: census.gov.

Consumer confidence: Index of consumer sentiment

The University of Michigan index of consumer sentiment in October 2017 reached 100.7, its highest level since January 2004. The index edged down to 98.5 in November 2017.



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

A portrait of Meg Lee, a woman with dark hair, smiling, wearing a purple top and gold hoop earrings. The background is a dark blue grid pattern.

***“Their voices
are ever
stronger at
the table...”***

MEG LEE
SVP and CMO
Norwegian Cruise Lines

WHAT WILL YOU DO TO GET CLOSER TO YOUR CUSTOMERS IN 2018?

“Norwegian Cruise Line has been in the business of taking care of our customers in a very special way for over 50 years. Our ships are purposefully designed for our guests to enjoy as they choose, while cruising to beautiful destinations around the world. Most importantly, they experience unforgettable moments that stay with them for a lifetime – that they love to share. Every year my team and I get closer to our guests and travel partners and 2018 will be no exception. I will set a personal record for days at sea, time spent in person and, of course, through social media connections. In May, I’ll join my customers as we deliver the incredible Norwegian Bliss to her new home in Seattle. And thanks to the accelerating availability of data and customer insights to power what we do, we understand and deliver against the needs of our guests and travel agents better every day. Their voices are ever stronger at the table, ensuring Norwegian Cruise Line makes the best decisions for them now and in the future. It also helps us more effectively find and welcome millions of new and returning loyal customers on board every year.”

How Americans use leisure time

Americans age 15+ on average had 5.1 hours of leisure time per day in 2016. TV remains by far the No. 1 leisure activity.

	Age									Gender	
	15-19	20-24	25-34	35-44	45-54	55-64	65-74	75+	15+	W	M
Average leisure hours per day in 2016											
All days	5.2	4.8	4.1	4.0	4.6	5.6	6.9	7.6	5.1	4.8	5.5
Weekdays	4.6	4.2	3.5	3.3	4.1	5.0	6.6	7.3	4.6	4.3	4.9
Weekends, holidays	6.6	6.3	5.7	5.6	5.9	6.9	7.7	8.2	6.4	5.9	7.0
Average weekday leisure hours spent in 2016											
Watching TV	1.7	1.9	1.7	1.8	2.4	3.0	4.0	4.2	2.5	2.4	2.6
Socializing and communicating	0.6	0.5	0.5	0.4	0.5	0.5	0.6	0.6	0.5	0.5	0.5
Playing games and computer use for leisure	0.7	0.7	0.4	0.2	0.2	0.3	0.5	0.5	0.4	0.3	0.5
Reading	0.1	0.1	0.1	0.2	0.2	0.3	0.5	0.9	0.3	0.3	0.2
Participating in sports, exercise and recreation	0.7	0.4	0.3	0.2	0.2	0.3	0.3	0.2	0.3	0.2	0.4
Relaxing/thinking	0.2	0.2	0.2	0.3	0.3	0.4	0.4	0.7	0.3	0.3	0.3
Other leisure and sports activities ¹	0.6	0.4	0.3	0.3	0.3	0.3	0.4	0.4	0.3	0.3	0.4

Source: Bureau of Labor Statistics' 2016 American Time Use Survey. More info: bls.gov/tus. 1. Including travel related to leisure and sports activities.

Households rich to poor: Income distribution¹

Share of U.S. aggregate income by household-income quintile. The poorest accounted for 3.1 percent of 2016 income.

Year	Lowest 20%	Second	Third	Fourth	Top 20%
1970	4.1%	10.8%	17.4%	24.5%	43.3%
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
2007	3.4	8.7	14.8	23.4	49.7
2016	3.1	8.3	14.2	22.9	51.5

Households rich to poor: Mean income²

By 2016 household-income quintile; change vs. 2007. Poor households have not fully recovered from the last recession.

	All households	Lowest 20%	Second	Third	Fourth	Top 20%
2016	\$83,143	\$12,943	\$34,504	\$59,149	\$95,178	\$213,941
% change vs. prerecession 2007	6.2%	-3.2%	1.2%	2.3%	3.9%	10.0%

Source: Census Bureau's Current Population Survey (Annual Social and Economic Supplements).

1. Numbers rounded. 2. Percent change based on real (inflation-adjusted) mean (average) income. More info: census.gov.

Binge watching: Get with the program

Percent of people in various age groups who binge watch TV series. Nearly 70 percent of adults age 18-34 binge watch at least once a month.

Group	Percent of people in this group that binge watch TV shows					
	1+ times a month	1-3 times a month	4+ times a month	Less than once a month	Less than once every six months	Never
Age 18-34	69.6%	37.0%	32.6%	14.9%	6.9%	8.6%
35-49	42.8	26.0	16.8	14.5	11.7	31.0
50-69	34.1	22.2	11.8	14.7	12.6	38.7
70+	28.9	18.1	10.8	11.9	14.5	44.7
Parent with child in home	51.6	30.3	21.3	15.0	9.9	23.5
Hispanic household	57.0	28.9	28.2	15.6	5.6	21.7
Non-millennials	36.1	22.8	13.3	14.1	12.6	37.1
Female	47.9	27.6	20.3	13.2	10.2	28.6
Male	43.7	26.2	17.5	15.5	11.8	29.0
Adults 18+	45.9%	26.9%	19.0%	14.3%	11.0%	28.8%

Source: Simmons Research, Enhanced Media Measurement Study, Spring 2017. More info: simmonsresearch.com.

How TV viewers are multitasking

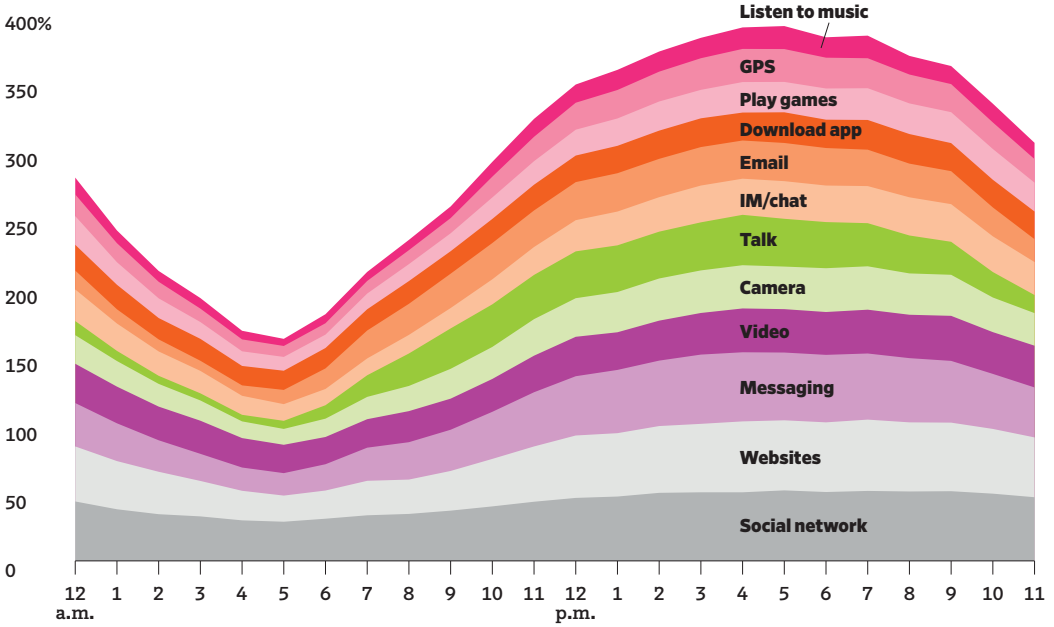
Percent of adults who do these activities while watching TV.

	Very often	Often	Somewhat often	Not very often	Not at all
Visit websites on mobile phone	26.0%	17.8%	15.8%	10.8%	29.6%
Text on mobile phone	24.8	19.2	18.9	14.3	22.7
Visit websites on computer	21.9	18.2	16.0	10.2	33.8
Talk on mobile phone	18.9	15.2	17.0	22.7	26.1
Email on computer	18.2	15.1	13.6	12.4	40.7
Instant message on computer	9.2	6.3	6.2	9.5	68.8
Watch videos on computer	8.1	5.2	6.8	9.8	70.1
Listen to radio	7.9	5.2	6.4	7.1	73.3
Read magazine or comic	6.2	7.8	9.9	15.7	60.4
Play video games	5.9	4.7	5.8	5.4	78.3

Source: Simmons Research, National Consumer Study, Spring 2017. More info: simmonsresearch.com. Results based on adult survey participants who answered question (and so results exclude non-responses).

When and how smartphone owners use their devices

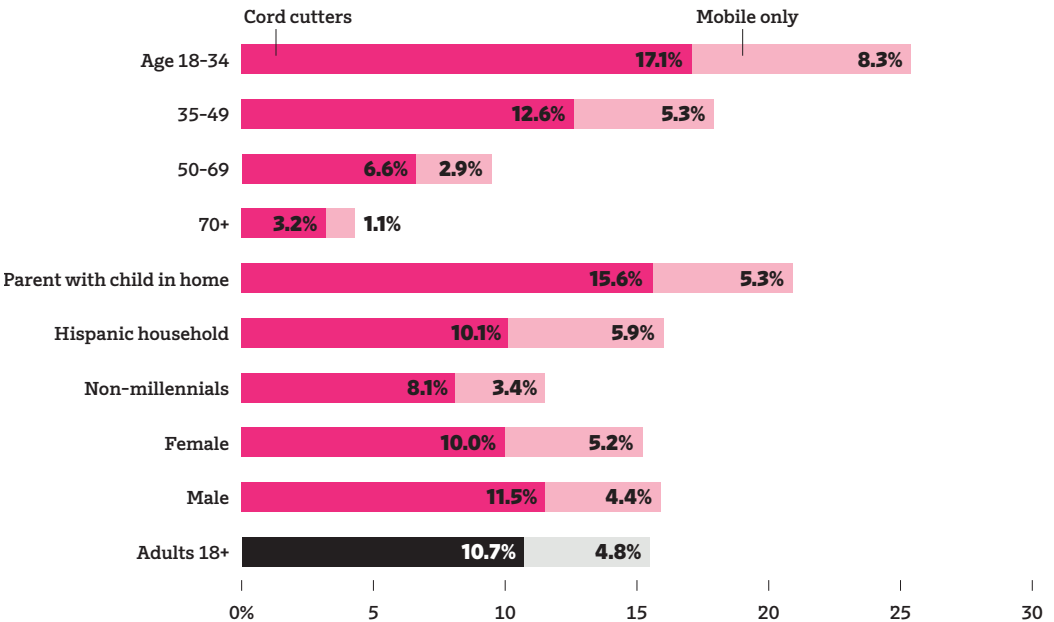
Social networking is the most popular activity on smartphones. Peak hour for social networking is 5 p.m., when 51.5 percent of adult smartphone owners check a social network (most likely Facebook).



Source: Simmons Research, Simmons Connect Study, Spring 2017. More info: simmonsresearch.com. 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, 52.1 percent of smartphone owners use their phone's web browser to access a website between 7 p.m. and 8 p.m. at least once in a week.

Demographics of cord cutters

Percent of people in various age groups who don't subscribe to cable or satellite TV but have access to online content either through at-home or mobile internet.



Source: Simmons Research, National Consumer Study, Spring 2017. More info: simmonsresearch.com. Cord cutters include cord nevers (those who have never paid for TV).

Ad Age

Hey, big spenders

The World's Largest Advertisers 2017 report from Ad Age Datacenter has been released. Our experts have crunched the data to give you:

- A proprietary database of the 100 biggest spenders
- Global marketer profiles showing ad spends by region, top executives and key agencies
- A ranking of the biggest advertisers in 95 countries, based on measured-media spending

This report is available exclusively to Ad Age Datacenter subscribers.

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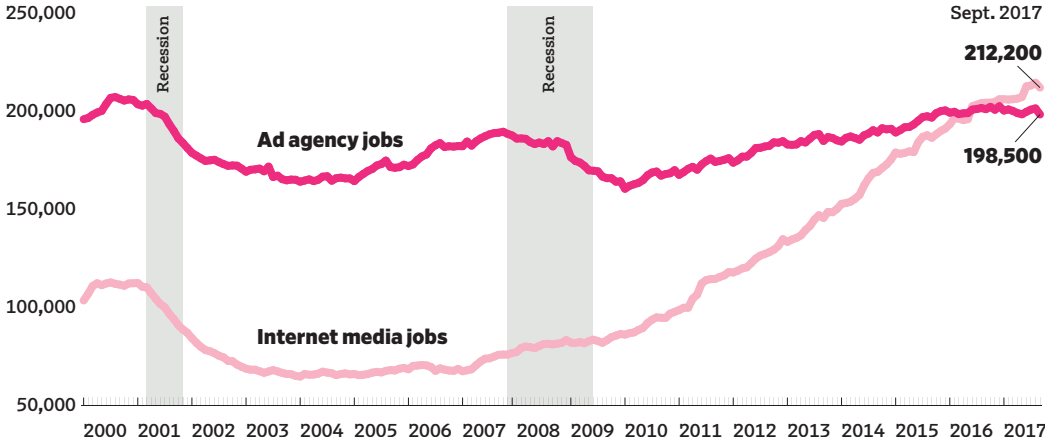
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JOBS

U.S. ad agency and internet media employment

Ad agency staffing in September 2017 dropped to its lowest level (198,500) since September 2015. Internet media¹ staffing (212,200 in September 2017) has more than doubled since 2011.



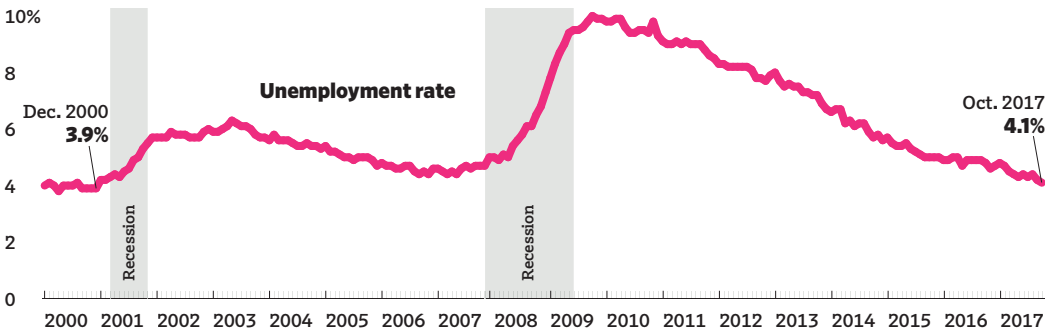
U.S. media employment

Share of media² jobs in 2000 (dot-com bubble), 2007 (eve of recession) and 2017.

Year	Internet media	TV	Newspaper	Magazine	Radio
2000	10.7%	22.2%	40.1%	16.2%	10.8%
2007	8.6	23.9	38.8	16.1	12.6
2017	29.1	24.2	22.4	12.8	11.5

U.S. unemployment rate

The nation's jobless rate in October 2017 dropped to its lowest point (4.1%) since December 2000.



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. December 2000; November 2007; September 2017.

“By using data properly, our marketing is viewed as an asset rather than an intrusion...”

GRAHAM SKIDMORE
VP Marketing and
Business Channel Strategy
Quicken Loans



WHAT WILL YOU DO TO GET CLOSER TO YOUR CUSTOMERS IN 2018?

“What people say and what they ultimately do rarely line up in marketing research. The key for me is to realize I am here to serve the team and use the data available to us to determine the best way to execute effectively. Ultimately, I am responsible for ensuring that the team executes at a high level and drives both profitability and an amazing client experience. All types of data are required to understand the proper market segmentation, as well as the type of content and creative that will best engage and move the consumer through the decision-making process. By using data properly, I become more predictive than reactive and our marketing is viewed as an asset rather than an intrusion in their buying process.”

IDENTITY.

WHO YOUR CUSTOMER IS. **REALLY IS.**

IDENTITY IS MORE

THAN A COOKIE, AN EMAIL, OR A DEVICE ID.

IT'S A PERSON. YOUR CUSTOMER.
YOUR PROSPECT. AND SHE LIVES
ONLINE AND OFFLINE IN ONE
CONNECTED WORLD.

IF YOU ARE A MARKETER,
IDENTITY IS EVERYTHING.

IT'S THE CORNERSTONE OF ALL YOU DO.
ONBOARDING. SEGMENTATION.
INSIGHTS. PERSONALIZATION.
MEASUREMENT. ATTRIBUTION.

IF YOU KNOW IDENTITY,
YOU CAN DO ALL OF IT.

BUILD MEDIA THAT MATTERS.
BUILD AUDIENCES WITH MEASUREMENT IN MIND.

IDENTITY = TRUST

UNDERSTANDING IDENTITY WILL BE
YOUR **COMPETITIVE ADVANTAGE**
IN A CONNECTED WORLD.



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