Advertising Age

19.6%
Portion of millennial households that don't subscribe to cable or satellite TV

2016 Edition

MARKETING FACT PACK

Annual Guide to Marketers, Media and Agencies

$1,298
U.S. media and marketing-services spending per person based on forecast for 2016

199,100
U.S. ad agency employment, the highest point for agency jobs since 2001

$965 BILLION
2016 worldwide media and marketing spending forecast, a record high

31.4%
Internet's projected share of U.S. ad spending in 2016, double the level of 2010

PUBLISHED DECEMBER 21, 2015

CRAIN

INSIDE

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THE BIG LIST

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

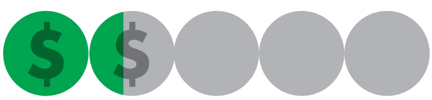
1. PROCTER & GAMBLE

BIGGEST U.S. ADVERTISER IN 2014

$4.6 billion in total ad spending

2. AT&T

MOST ADVERTISED U.S. BRAND BASED ON AD SPENDING IN 2014

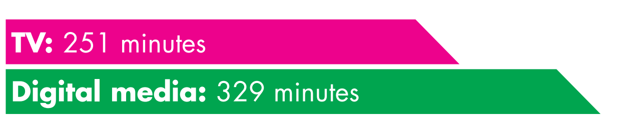


$1.4 billion in measured-media spending

3. MEDIA SPENDING IN 2016

U.S. FORECAST: $190 BILLION

4. TIME SPENT BY U.S. ADULTS WITH MAJOR MEDIA IN 2015



5. TELEVISION

BIGGEST U.S. AD MEDIUM IN 2015

36.5% *of ad spending*

6. INTERNET

FASTEST-GROWING U.S. AD MEDIUM IN 2015

18.2% *growth*

7. GOOGLE

BIGGEST U.S. MOBILE AD SELLER IN 2015

$10 billion *in mobile ad revenue*

8. WPP

WORLD'S BIGGEST AGENCY COMPANY IN 2014

$19 billion *in revenue*

9. YOUNG & RUBICAM GROUP

WORLD'S BIGGEST AGENCY NETWORK IN 2014

$3.7 billion *in revenue*

10. EPSILON

BIGGEST U.S. AGENCY IN 2014

$1.8 billion *in revenue*

MARKETERS

U.S. AND WORLDWIDE MEDIA ADVERTISING GROWTH RATES

PERCENT CHANGE IN AD SPENDING, 2011-2018

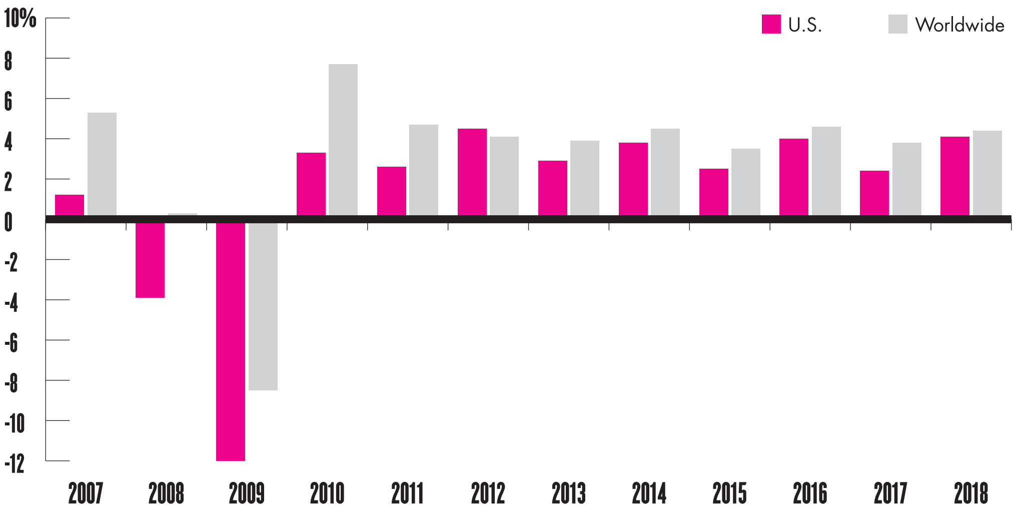
Forecasts and revised historic data. The average of GroupM, Magna Global and ZenithOptimedia forecasts suggests U.S. ad spending growth of 4.0% in 2016, up from 2.5% in 2015, as spending gets a boost from election ads and the Olympics. Consensus for worldwide ad spending is 4.6% in 2016, up from 3.5% in 2015.

U.S.	2011	2012	2013	2014	2015	2016	2017	2018
GroupM (WPP)	3.1%	3.8%	2.4%	3.1%	1.8%	**2.7%**	NA	NA
Magna Global (Interpublic)	3.1	4.9	2.4	3.3	2.1	**5.2**	1.5%	4.8%
ZenithOptimedia (Publicis)	1.7	4.6	3.8	4.9	3.6	**3.9**	3.2	3.3
Kantar Media (WPP)	0.8	3.2	0.9	0.7	-3.9	**NA**	NA	NA
Average of GroupM, Magna Global and ZenithOptimedia	**2.6%**	**4.5%**	**2.9%**	**3.8%**	**2.5%**	**4.0%**	**2.4%**	**4.1%**

WORLDWIDE	2011	2012	2013	2014	2015	2016	2017	2018
GroupM (WPP)	4.9%	4.3%	3.6%	3.9%	3.4%	**4.5%**	NA	NA
Magna Global (Interpublic)	4.8	3.9	3.9	4.6	3.2	**4.6**	3.4%	4.6%
ZenithOptimedia (Publicis)	4.4	4.0	4.2	4.9	3.9	**4.7**	4.3	4.2
Average of GroupM, Magna Global and ZenithOptimedia	**4.7%**	**4.1%**	**3.9%**	**4.5%**	**3.5%**	**4.6%**	**3.8%**	**4.4%**

AD SPENDING GROWTH IN U.S. AND WORLDWIDE

Based on average of GroupM, Magna Global and ZenithOptimedia forecasts, 2007-2018.



Source: December 2015 advertising forecasts of WPP's GroupM (This Year, Next Year), Interpublic Group of Cos.' Magna Global (Global Ad Spend Forecast) and Publicis Groupe's ZenithOptimedia (Advertising Expenditure Forecasts). Numbers rounded. Figures include TV, internet, newspaper, magazine, radio and out of home. Figures from WPP's Kantar Media are U.S. measured-media spending growth rates; 2015 reflects first six months of 2015. U.S. averages for 2017 and 2018 based on average of Magna Global and ZenithOptimedia. More info: groupm.com, kantarmedia.us, magnaglobal.com, zenithoptimedia.com.

10 MOST ADVERTISED BRANDS

Based on 2014 U.S. measured-media ad spending.

1. AT&T
AT&T
2014 vs. 2013: -20.0%

$1.44 BILLION

2. VERIZON
Verizon Communications
4.2%

$1.29 BILLION

3. GEICO
Berkshire Hathaway
14.2%

$1.16 BILLION

4. MCDONALD'S
McDonald's Corp.
-4.2%

$935 MILLION

5. CHEVROLET
General Motors Co.
-10.8%

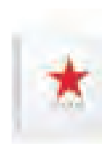
$888 MILLION

6. WALMART
Walmart Stores
1.1%

$867 MILLION

7. SPRINT
SoftBank Group Corp. (Sprint Corp.)
8.2%

$828 MILLION



8. MACY'S
Macy's
-0.5%

$757 MILLION

9. TOYOTA
Toyota Motor Corp.
-22.2%

$736 MILLION

10. NISSAN
Nissan Motor Co.
9.0%

$703 MILLION

From 200 Leading National Advertisers 2015 (July 13, 2015, print edition). See ranking of nation's 200 most advertised brands: **AdAge.com/lna2015**. Source: Ad Age Datacenter analysis of measured-media data from WPP's Kantar Media. Company's measured spending for all goods and services related to brand. More info: kantarmedia.us.

25 BIGGEST U.S. ADVERTISERS

By 2014 total U.S. ad spending (measured media plus unmeasured spending). Dollars in millions.

		TOTAL U.S. AD SPENDING (MEASURED MEDIA PLUS UNMEASURED)			U.S. MEASURED-MEDIA AD SPENDING		
RANK	MARKETER, HEADQUARTERS	2014	2013	% CHG	2014	2013	% CHG
1	**Procter & Gamble Co.** Cincinnati	**$4,607**	$4,809	-4.2	**$2,919**	$3,362	-13.2
2	**AT&T** Dallas	**3,272**	3,268	0.1	**1,636**	1,880	-13.0
3	**General Motors Co.** Detroit	**3,120**	3,142	-0.7	**1,660**	1,813	-8.4
4	**Comcast Corp.** Philadelphia	**3,029**	3,082	-1.7	**1,557**	1,668	-6.7
5	**Verizon Communications** New York	**2,526**	2,438	3.6	**1,292**	1,238	4.4
6	**Ford Motor Co.** Dearborn, Mich.	**2,467**	2,559	-3.6	**842**	1,138	-26.0
7	**American Express Co.** New York	**2,364**	2,191	7.9	**372**	300	24.0
8	**Fiat Chrysler Automobiles** London	**2,250**	1,974	14.0	**1,128**	1,166	-3.3
9	**L'Oréal** Clichy, France	**2,158**	2,202	-2.0	**1,474**	1,605	-8.2
10	**Walt Disney Co.** Burbank, Calif.	**2,109**	1,964	7.4	**869**	892	-2.6
11	**Toyota Motor Corp.** Toyota City, Japan	**2,090**	2,090	0.0	**1,203**	1,275	-5.6
12	**Johnson & Johnson** New Brunswick, N.J.	**1,968**	1,875	5.0	**1,088**	1,027	5.9
13	**Walmart Stores** Bentonville, Ark.	**1,940**	1,926	0.7	**947**	940	0.8
14	**JPMorgan Chase & Co.** New York	**1,897**	1,879	0.9	**345**	417	-17.2
15	**Samsung Electronics Co.** Suwon, South Korea	**1,825**	1,701	7.3	**668**	614	8.8
16	**Time Warner** New York	**1,697**	1,724	-1.6	**1,006**	894	12.6
17	**Pfizer** New York	**1,673**	1,479	13.1	**1,423**	1,158	22.9
18	**Target Corp.** Minneapolis	**1,647**	1,623	1.5	**686**	731	-6.1
19	**Macy's** Cincinnati	**1,602**	1,623	-1.3	**834**	839	-0.5
20	**Bank of America Corp.** Charlotte, N.C.	**1,584**	1,580	0.3	**354**	476	-25.7
21	**21st Century Fox** New York	**1,584**	1,240	27.7	**768**	683	12.5
22	**Anheuser-Busch InBev** Leuven, Belgium/St. Louis	**1,568**	1,564	0.3	**539**	572	-5.8
23	**Berkshire Hathaway** Omaha, Neb.	**1,539**	1,552	-0.8	**1,429**	1,256	13.7
24	**SoftBank Group Corp. (Sprint Corp.)** Overland Park, Kan.	**1,500**	1,555	-3.5	**929**	943	-1.5
25	**Capital One Financial Corp.** McLean, Va.	**1,464**	1,285	14.0	**442**	459	-3.7
	Total for the 25	**$53,480**	$52,324	2.2	**$26,410**	$27,345	-3.4

From 200 Leading National Advertisers 2015 (July 13, 2015, print edition). See expanded data and report methodology at **AdAge.com/lna2015**. See 200 Leading National Advertisers database including profiles, agency rosters and executives, updated in December 2015: **AdAge.com/marketertrees2015update**.

Source: Ad Age Datacenter. Total U.S. ad spending is measured-media ad spending (from WPP's Kantar Media) plus unmeasured spending (estimated by Ad Age). Numbers rounded. Measured spending includes TV, newspaper, magazine, radio, outdoor and internet (display advertising; excludes paid search, video and other forms of internet advertising). More info: kantarmedia.us. Unmeasured spending figures are Ad Age Datacenter estimates including direct marketing, promotion, internet paid search, social media and other forms of spending not included in measured media.

25 BIGGEST GLOBAL ADVERTISERS

By 2014 worldwide measured-media ad spending. Dollars in millions.

		WORLDWIDE MEASURED-MEDIA AD SPENDING			U.S. MEASURED-MEDIA AD SPENDING		
RANK	MARKETER, HEADQUARTERS	2014	2013	% CHG	2014	2013	% CHG
1	**Procter & Gamble Co.** Cincinnati	**$10,125**	$10,531	-3.9	**$2,919**	$3,362	-13.2
2	**Unilever** London/Rotterdam, Netherlands	**7,394**	7,682	-3.8	**844**	805	4.8
3	**L'Oréal** Clichy, France	**5,264**	5,666	-7.1	**1,474**	1,605	-8.2
4	**Coca-Cola Co.** Atlanta	**3,279**	3,012	8.9	**409**	320	27.7
5	**Toyota Motor Corp.** Toyota City, Japan	**3,185**	3,431	-7.2	**1,203**	1,275	-5.6
6	**Volkswagen** Wolfsburg, Germany	**3,171**	3,048	4.0	**605**	526	14.9
7	**Nestlé** Vevey, Switzerland	**2,930**	3,078	-4.8	**703**	811	-13.3
8	**General Motors Co.** Detroit	**2,849**	3,101	-8.2	**1,660**	1,813	-8.4
9	**Mars Inc.** McLean, Va.	**2,569**	2,698	-4.8	**827**	807	2.5
10	**McDonald's Corp.** Oak Brook, Ill.	**2,494**	2,638	-5.5	**936**	976	-4.1
11	**RB (Reckitt Benckiser Group)** Slough, U.K.	**2,449**	2,536	-3.4	**296**	416	-28.8
12	**Naspers** Cape Town, South Africa	**2,427**	2,298	5.6	**0**	0	NA
13	**Sony Corp.** Tokyo	**2,346**	2,698	-13.0	**621**	560	10.9
14	**AT&T** Dallas	**2,183**	2,454	-11.0	**2,014**	2,230	-9.7
15	**Nissan Motor Co.** Yokohama, Japan	**2,180**	2,156	1.1	**862**	862	0.0
16	**Johnson & Johnson** New Brunswick, N.J.	**2,072**	2,006	3.3	**1,088**	1,027	5.9
17	**PepsiCo** Purchase, N.Y.	**2,063**	2,655	-22.3	**817**	889	-8.1
18	**Pfizer** New York	**1,984**	1,630	21.8	**1,423**	1,158	22.9
19	**Ford Motor Co.** Dearborn, Mich.	**1,981**	2,254	-12.1	**842**	1,138	-26.0
20	**Fiat Chrysler Automobiles** London	**1,945**	1,994	-2.5	**1,128**	1,166	-3.2
21	**Samsung Electronics Co.** Suwon, South Korea	**1,905**	2,103	-9.4	**668**	614	8.8
22	**Yum Brands** Louisville, Ky.	**1,766**	1,806	-2.2	**843**	862	-2.1
23	**Mondelez International** Deerfield, Ill.	**1,738**	1,724	0.8	**198**	203	-2.5
24	**Comcast Corp.** Philadelphia	**1,715**	1,848	-7.2	**1,557**	1,668	-6.7
25	**Deutsche Telekom (T-Mobile)** Bonn, Germany	**1,649**	1,729	-4.6	**871**	803	8.5
	Total for the 25	**$73,662**	$76,777	-4.1	**$24,806**	$25,896	-4.2

From Global Marketers 2015 (Dec. 7, 2015).

See 10 biggest advertisers for 95 countries and markets, report methodology and links to measured-media tracking services by country: **AdAge.com/globalmarketers2015**.

Source: Ad Age Datacenter analysis of data from measured-media tracking services. Numbers rounded. U.S. measured media from Kantar Media. **AT&T:** Includes DirecTV, acquired in July 2015.

U.S. MARKET LEADERS BY CATEGORY

With U.S. measured-media ad spending from Kantar Media. Dollars in millions.

WIRELESS

U.S. market share for wireless-service providers

RANK 2014	MARKETER	MARKET SHARE 2014	MEASURED MEDIA 2014
1	Verizon Communications	32.6%	$1,040
2	AT&T	29.2	1,200
3	SoftBank Group Corp. (Sprint Corp.)	13.6	908
4	Deutsche Telekom (T-Mobile US)	12.5	845
5	America Movil (TracFone Wireless)	8.8	166
6	Telephone and Data Systems (U.S. Cellular)	1.4	34
	Top 6	98.1	4,194
	All other	1.9	1,237
	Industry total *(subscribers in millions)*	*355.4*	$5,431

CREDIT CARDS

U.S. market share based on card purchase volume

RANK 2014	MARKETER	MARKET SHARE 2014	MEASURED MEDIA 2014
1	American Express Co.	25.1%	$336
2	JPMorgan Chase & Co. (Chase)	19.4	200
3	Bank of America Corp.	10.7	139
4	Citigroup (Citibank)	8.3	214
5	Capital One Financial Corp.	6.7	317
6	Discover Financial Services	4.4	132
7	U.S. Bancorp (U.S. Bank)	3.9	1
8	Wells Fargo & Co.	3.7	4
9	Barclays	2.2	27
10	Synchrony Financial	1.5	3
	Industry total *(purchase volume, $ trillions)*	*$2.631*	$1.685

INSURANCE BRANDS

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

RANK 2014	BRAND, MARKETER	SHARE OF AD SPENDING 2014	MEASURED MEDIA 2014
1	Geico Berkshire Hathaway	19.8%	$1,159
2	State Farm State Farm Mutual Auto Insurance Co.	10.2	599
3	Progressive Progressive Corp.	9.7	572
4	Allstate Allstate Corp.	7.2	425
5	Nationwide Nationwide Mutual Insurance Co.	5.6	326
6	Liberty Mutual Liberty Mutual Holding Co.	4.5	265
7	Esurance Allstate Corp.	4.5	263
8	Farmers Insurance Zurich Insurance Group	2.9	170
9	UnitedHealthcare UnitedHealth Group	2.8	163
10	USAA United Services Automobile Association	2.4	142
	Total industry measured-media spending		$5,869

RETAIL

Ranking based on U.S. measured-media spending

RANK 2014	MARKETER	SHARE OF U.S. RETAIL SALES 2014	MEASURED MEDIA 2014
1	Walmart Stores	11.5%	$947
2	Macy's	0.9	834
3	Target Corp.	2.4	686
4	Amazon	1.5	454
5	Sears Holdings Corp.	1.0	430
6	Home Depot	2.5	402
7	J.C. Penney Co.	0.4	390
8	Lowe's Cos.	1.8	344
9	Kohl's Corp.	0.6	320
10	Best Buy Co.	1.2	310
	Industry total *(U.S. sales, $ trillions)*	*$3.022*	$15.735

From Ad Age's 200 Leading National Advertisers 2015 (July 13, 2015, print edition). Numbers rounded. Expanded footnotes and source information: **AdAge.com/lna2015**. Source: U.S. measured-media spending from WPP's Kantar Media. Dollars in millions. More info: kantarmedia.us.

Other sources: **Wireless:** U.S. network operator market share from ComScore MobiLens for subscribers (age 13+), three months ended December 2014. Year-end subscriber connections (number of active devices) from CTIA; some users have more than one device. More info: comscore.com; ctia.org. Ad spending for companies' wireless services. **Credit cards:** The Nilson Report. More info: nilsonreport.com. **Insurance brands:** Ad Age Datacenter analysis of measured-media spending. Share shown is spending on brand as percentage of industry total spending. **Retail:** Company filings; Census Bureau (U.S. sales total from Census Bureau's Monthly Retail Trade Survey). More info: census.gov. Amazon: Share shown is Ad Age Datacenter estimate.

BIRTHDAY SHOPPING.
IT'S A COMPETITIVE SPORT.

GRANDMA WAGNER // #1 IN HER GRANDKID'S HEART

She's shopping for her grandson, so she's got her game face on. You see, for Grandma Wagner only the perfect gift will do. To understand consumers like her, start by onboarding your data to Neustar's marketing platform. From there you can combine it with our offline information, based on 120 million U.S. households. Gain insights in real time, personalize messages, and help cement her status as the mother of all grandmas. Learn more at **www.neustar.biz/winterfactpack.**

neustar®

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U.S. MARKET LEADERS BY CATEGORY

With U.S. measured-media ad spending from Kantar Media. Dollars in millions.

AUTO MARKETERS

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

RANK 2014	MARKETER	MARKET SHARE 2014	MEASURED MEDIA 2014
1	**General Motors Co.**	17.8%	$1,660
2	**Ford Motor Co.**	15.0	842
3	**Toyota Motor Corp.**	14.4	1,203
4	**Fiat Chrysler Automobiles**	12.7	1,128
5	**Honda Motor Co.**	9.3	567
6	**Nissan Motor Co.**	8.4	862
7	**Hyundai Motor Co.**	4.4	304
8	**Volkswagen**	3.6	605
9	**Kia Motors Corp.**	3.5	381
10	**BMW Group**	2.4	198
	Industry total *(vehicles sold in millions)*	*16.523*	$8,700

AUTO BRANDS

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

RANK 2014	BRAND, MARKETER	MARKET SHARE 2014	MEASURED MEDIA 2014
1	**Ford** Ford Motor Co.	14.4%	$612
2	**Chevrolet** General Motors Co.	12.3	888
3	**Toyota** Toyota Motor Corp.	12.1	736
4	**Honda** Honda Motor Co.	8.3	430
5	**Nissan** Nissan Motor Co.	7.7	703
6	**Hyundai** Hyundai Motor Co.	4.4	304
7	**Jeep** Fiat Chrysler Automobiles	4.2	279
8	**Kia** Kia Motors Corp.	3.5	381
9	**Dodge** Fiat Chrysler Automobiles	3.5	268
10	**Subaru** Fuji Heavy Industries	3.1	294
	Industry total *(vehicles sold in millions)*	*16.523*	$8,700

PERSONAL CARE BRANDS

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

RANK 2014	BRAND, MARKETER	SHARE OF AD SPENDING 2014	MEASURED MEDIA 2014
1	**L'Oréal Paris** L'Oréal	8.1%	$561
2	**Maybelline New York** L'Oréal	4.4	302
3	**Crest** Procter & Gamble Co.	4.0	274
4	**Garnier** L'Oréal	3.4	232
5	**Neutrogena** Johnson & Johnson	3.3	229
6	**Olay** Procter & Gamble Co.	3.1	215
7	**Dove** Unilever	2.6	180
8	**CoverGirl** Procter & Gamble Co.	2.2	155
9	**Gillette** Procter & Gamble Co.	2.2	155
10	**Colgate** Colgate-Palmolive Co.	2.2	153
	Total personal care measured-media spending		$6,931

HOUSEHOLD PRODUCT BRANDS

Share of U.S. household product ad spending

RANK 2014	BRAND, MARKETER	SHARE OF AD SPENDING 2014	MEASURED MEDIA 2014
1	**OxiClean** Church & Dwight Co.	8.0%	$146
2	**Tide** Procter & Gamble Co.	7.7	142
3	**Clorox** Clorox Co.	5.9	109
4	**Charmin** Procter & Gamble Co.	4.8	88
5	**Bounty** Procter & Gamble Co.	4.6	83
6	**Febreze** Procter & Gamble Co.	4.3	79
7	**Glade** SC Johnson	3.8	69
8	**Gain** Procter & Gamble Co.	3.3	61
9	**Arm & Hammer** Church & Dwight Co.	3.0	55
10	**Lysol** RB (Reckitt Benckiser Group)	2.6	48
	Total household product measured-media spending		$1,831

From Ad Age's 200 Leading National Advertisers 2015 (July 13, 2015, print edition). Numbers rounded. Expanded footnotes and source information: **AdAge.com/lna2015**. Source: U.S. measured-media spending from WPP's Kantar Media. Dollars in millions. More info: kantarmedia.us.

Other sources: **Auto marketers, auto brands:** Automotive News Data Center (market share, sales). More info: autonews.com. Market share is for cars and light trucks. U.S. measured-media spending for automakers. Excludes dealer advertising. **Personal care brands:** Ad Age Datacenter analysis of measured-media spending. Share of advertising and industry total category ad spending. **Household product brands:** Ad Age Datacenter analysis of measured-media spending. Share of advertising and industry total category ad spending.

U.S. MARKET LEADERS BY CATEGORY

With U.S. measured-media ad spending from Kantar Media. Dollars in millions.

BEVERAGE BRANDS

U.S. market share based on sales volume

RANK 2014	BRAND, MARKETER	MARKET SHARE 2014	MEASURED MEDIA 2014
1	**Coke** Coca-Cola Co.	13.3%	$270
2	**Pepsi** PepsiCo	6.6	182
3	**Mountain Dew** PepsiCo	4.4	76
4	**Dr Pepper** Dr Pepper Snapple Group	3.8	107
5	**Nestlé Pure Life** Nestlé	3.3	5
6	**Gatorade** PepsiCo	3.2	150
7	**Sprite** Coca-Cola Co.	2.7	14
8	**Poland Spring** Nestlé	2.3	0
9	**Dasani** Coca-Cola Co.	2.1	6
10	**Aquafina** PepsiCo	1.6	13
	Industry total *(gallons in billions)*	*30.9*	$1,770

RESTAURANTS

U.S. market share based on systemwide sales

RANK 2014	CHAIN, MARKETER	MARKET SHARE 2014	MEASURED MEDIA 2014
1	**McDonald's** McDonald's Corp.	7.6%	$935
2	**Starbucks** Starbucks Corp.	2.7	103
3	**Subway** Doctor's Associates	2.6	533
4	**Burger King** Restaurant Brands International	1.9	237
5	**Wendy's** Wendy's Co.	1.8	284
6	**Taco Bell** Yum Brands	1.8	357
7	**Dunkin' Donuts** Dunkin' Brands Group	1.5	132
8	**Chick-fil-A** Chick-fil-A	1.2	51
9	**Pizza Hut** Yum Brands	1.2	233
10	**Applebee's** DineEquity	1.0	165
	Industry total *(U.S. sales, $ in billions)*	*$465.9*	$6,382

PRESCRIPTION DRUGS

U.S. market share based on dollar sales

RANK 2014	MARKETER	MARKET SHARE 2014	MEASURED MEDIA 2014
1	**AstraZeneca**	5.2%	$330
2	**Novartis**	5.2	22
3	**Johnson & Johnson**	5.1	235
4	**Gilead Sciences**	4.9	59
5	**Pfizer**	4.8	1,171
6	**Roche Holding**	4.7	76
7	**Merck & Co.**	4.7	325
8	**Teva Pharmaceutical Industries**	4.7	13
9	**Amgen Corp.**	4.4	136
10	**Sanofi**	3.9	18
	Total *(U.S. prescription drug sales, $ in billions)*	*$373.9*	$4,808

BEER

U.S. market share based on shipment volume

RANK 2014	MARKETER	MARKET SHARE 2014	MEASURED MEDIA 2014
1	**Anheuser-Busch InBev**	44.7%	$539
2	**SABMiller** (MillerCoors)	26.0	417
3	**Constellation Brands**	6.7	171
4	**Heineken**	3.9	150
5	**Pabst Brewing Co.**	2.5	3
6	**Boston Beer Co.**	1.9	50
7	**D.G. Yuengling & Son**	1.4	6
8	**Florida Ice and Farm Co.** (North American Breweries)	1.1	4
9	**Diageo**	1.1	19
10	**Mark Anthony Group** (Mike's Hard Lemonade)	0.7	1
	Industry total *(barrels in millions)*	*214.7*	$1,398

Beverage brands: Beverage Marketing Corp. More info: beveragemarketing.com. Market share data for refreshment beverages based on U.S. sales volume. **Restaurants:** 2015 Technomic Top 500 Chain Restaurant Advance Report (sales used to calculate market share; some are estimates). More info: technomic.com. Systemwide sales is franchised plus company-owned restaurants. **Prescription drugs:** IMS Health (market share, industry total drug sales). More info: imshealth.com. **Beer:** Beer Marketer's Insights (U.S. market share, U.S. industry sales). More info: beerinsights.com. Ranked based on U.S. shipment volume. Measured spending for marketers' beer brands. Anheuser-Busch InBev in November 2015 signed deal to buy SABMiller and entered side deal to sell SABMiller's majority stake in MillerCoors to Molson Coors Brewing Co., which would make Molson Coors 100% owner of MillerCoors.

U.S. AD SPENDING FORECAST FROM ZENITHOPTIMEDIA

Estimated spending in major media and marketing services. Media spending in 2015 finally passed its prerecession peak, according to ZenithOptimedia. It expects media spending to grow 3.9% to $189.8 billion in 2016. It forecasts 2016 total media and marketing-services spending will reach a record $420.6 billion–$1,298 per person in the U.S.

MAJOR MEDIA

SECTOR	2016 SPENDING ($ BILLIONS)	2016 VS. 2015 % CHG	2015 VS. 2014 % CHG
TV	$67.1	0.6%	-0.4%
Internet	59.7	15.6	18.2
Newspaper	18.5	-7.0	-7.0
Radio	17.6	0.0	1.0
Magazine	17.1	-1.8	-1.9
Outdoor and cinema	9.8	4.1	4.1
Total: major media	$189.8	3.9%	3.6%

MARKETING SERVICES

SECTOR	2016 SPENDING ($ BILLIONS)	2016 VS. 2015 % CHG	2015 VS. 2014 % CHG
Sales promotion	$77.2	3.5%	3.0%
Telemarketing	56.2	3.0%	3.0%
Direct mail	49.4	-0.8%	0.5%
Event sponsorship	35.0	7.4%	8.0%
Directories	8.1	-0.6%	-0.8%
Public relations	5.0	7.4%	5.0%
Total: marketing services	$230.9	2.9%	3.0%
Total: media and marketing services	$420.6	3.4%	3.3%

Source: Publicis Groupe's ZenithOptimedia (Advertising Expenditure Forecasts, December 2015). Numbers rounded.
More info: zenithoptimedia.com.

U.S. AD SPENDING TOTALS BY MEDIUM FROM KANTAR MEDIA

Measured-media spending for total U.S. and 200 Leading National Advertisers. Dollars in millions.

	KANTAR MEASURED-MEDIA SPENDING FOR TOTAL U.S.			200 LNA MEASURED-MEDIA AND UNMEASURED SPENDING		
Medium	2014	2013	% chg	2014	2013	% chg
Consumer, Sunday, b-to-b and local magazine	$22,420	$23,632	-5.1%	$9,386	$10,601	-11.5%
National and local newspaper; free-standing inserts	16,689	18,387	-9.2	4,223	4,865	-13.2
Network TV	28,315	26,951	5.1	22,619	21,601	4.7
Spot TV	16,791	15,893	5.7	4,897	5,055	-3.1
Syndicated TV	5,191	5,159	0.6	3,716	3,844	-3.3
Cable TV networks	27,833	26,029	6.9	17,976	17,038	5.5
Network, national spot and local radio	6,744	7,018	-3.9	2,607	2,793	-6.6
Outdoor	4,397	4,406	-0.2	1,291	1,422	-9.2
Internet display	12,791	12,683	0.9	5,196	5,994	-13.3
Measured media	$141,172	$140,156	0.7%	$71,910	$73,212	-1.8%
Unmeasured spending	NA	NA	NA	65,882	61,863	6.5%
Total U.S. spending	NA	NA	NA	$137,792	$135,075	2.0%

From 200 Leading National Advertisers 2015 (July 13, 2015, print edition). See full report and methodology: **AdAge.com/lna2015**. See 200 LNA database including profiles, agency rosters and executives, updated in December 2015: **AdAge.com/marketertrees2015update**.

Source: Ad Age Datacenter. Measured-media spending by medium from WPP's Kantar Media. More info: kantarmedia.us. Consumer magazine includes Spanish-language magazines. Local newspaper includes Spanish-language newspapers. Network TV includes Spanish-language networks. Unmeasured spending figures are Ad Age Datacenter estimates including direct marketing, promotion, internet paid search, social media and other forms of spending not included in measured media.

WORLDWIDE AD SPENDING FORECAST FROM GROUPM

Estimated spending in media and marketing. Media spending in 2016 will account for 53.9% of worldwide media and marketing spending, according to GroupM's forecast; marketing services will capture 46.1%. GroupM forecasts 2016 total media and marketing spending will reach a record $965.1 billion–$132 per person.

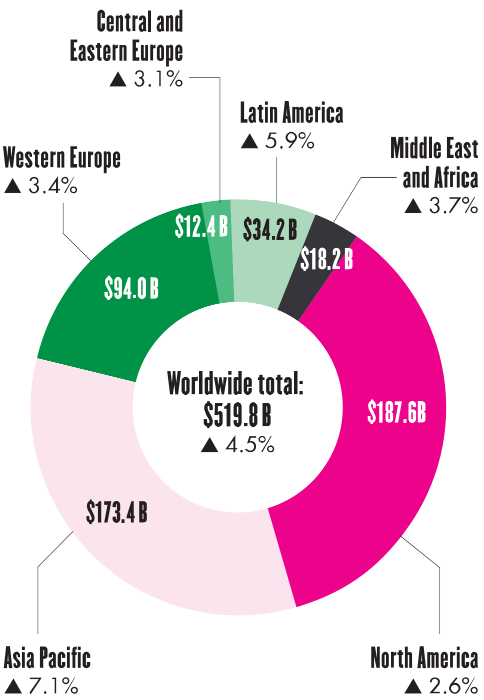
MEDIA SECTOR	2016 SPENDING ($ BILLIONS)	2016 VS. 2015 % CHG	2015 VS. 2014 % CHG
TV	$214.0	2.3%	0.9%
Digital	160.2	14.4	17.2
Newspaper	53.3	-5.7	-7.9
Radio	22.5	1.3	0.1
Magazine	38.0	-1.8	-5.4
Outdoor and cinema	31.9	3.0	3.3
Total: media	$519.8	4.5%	3.4%

MARKETING SECTOR	2016 SPENDING ($ BILLIONS)	2016 VS. 2015 % CHG	2015 VS. 2014 % CHG
Direct marketing	$322.8	4.9%	4.6%
Sponsorship	59.1	2.8	4.1
Public relations	12.5	3.7	3.4
Data investment management (market research)	46.0	2.8	1.9
Healthcare	4.9	1.7	1.7
Total: marketing	$445.3	4.3%	4.2%
Total: media and marketing	$965.1	4.4%	3.8%

Source: WPP's GroupM (This Year, Last Year, December 2015). More info: groupm.com.

WORLDWIDE AD SPENDING BY REGION FROM GROUPM

Media spending in 2016 and percent change vs. 2015.



WORLD'S 10 LARGEST ADVERTISING MARKETS

From GroupM. Ad spending forecast by country for 2016. The U.S., home to 4.4% of the world population, will account for more than one-third of 2016 worldwide media spending. China, home to about 19% of the world population, will account for 16.4% of media spending.

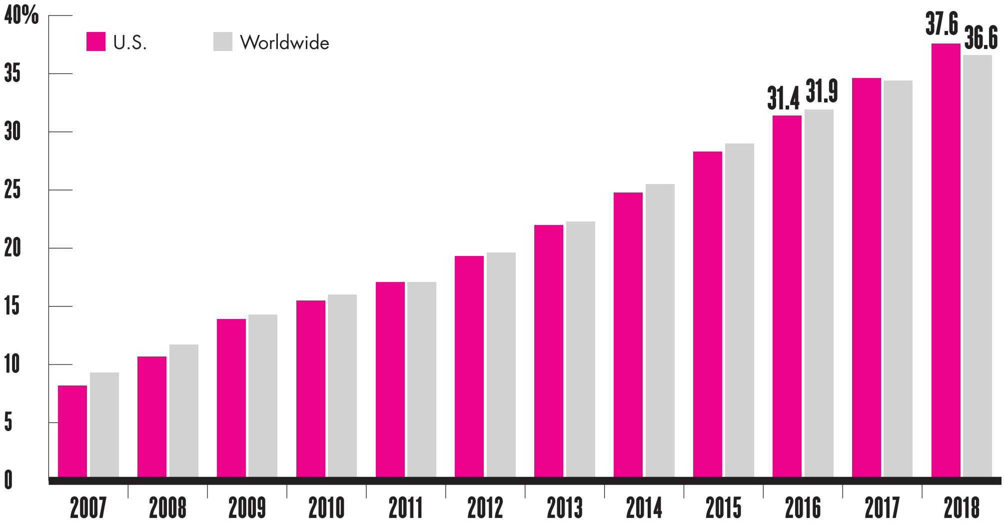
RANK	MARKET	2016 SPENDING ($ BILLIONS)	2016-2015 % CHG	SHARE OF WORLD
1	U.S.	$178.0	2.7%	34.3%
2	China	85.5	9.1	16.4
3	Japan	38.6	3.0	7.4
4	U.K.	25.9	7.2	5.0
5	Brazil	18.7	6.7	3.6
6	Germany	18.6	1.4	3.6
7	France	11.5	0.2	2.2
8	Australia	9.9	4.5	1.9
9	Canada	9.6	0.4	1.8
10	South Korea	8.9	2.3	1.7
	Top 10	$405.2	4.3%	78.0%
	Total worldwide	$519.8	4.5%	100.0%

Source: WPP's GroupM (This Year, Last Year, December 2015). **Media:** TV, digital, newspaper, radio, magazine, outdoor, cinema. Numbers rounded. Asia Pacific includes Asean and North Asia. More info: groupm.com.

MEDIA

INTERNET'S SHARE OF AD SPENDING

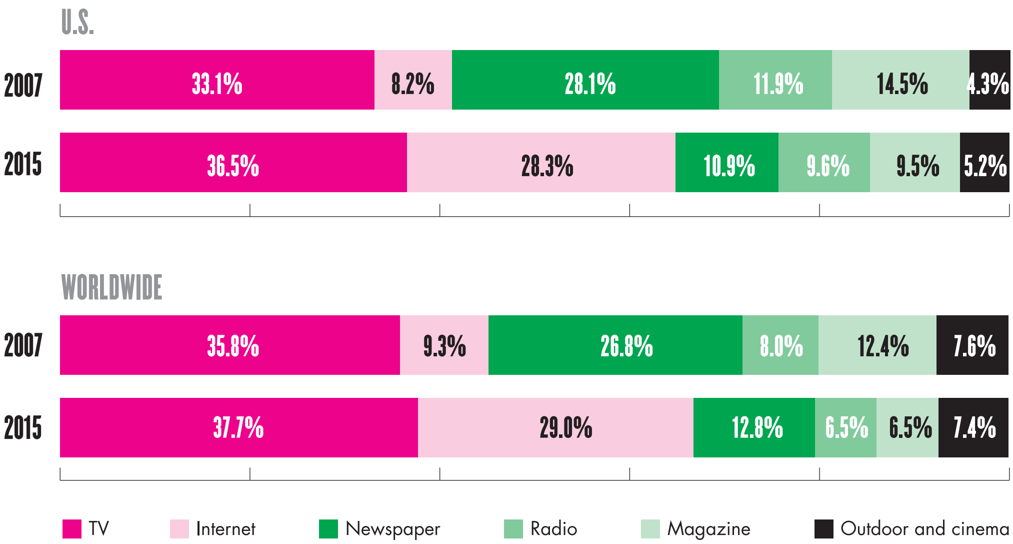
ZenithOptimedia expects the internet to account for more than 31% of U.S. and worldwide ad spending in 2016, double the level of 2010.



Source: ZenithOptimedia (Advertising Expenditure Forecasts, December 2015). Numbers rounded. Internet includes mobile.
More info: zenithoptimedia.com.

SHARE OF U.S. AND WORLDWIDE AD SPENDING BY MEDIUM

This graphic shows the share of media spending by medium in 2015 vs. prerecession 2007. The internet's share has surged. But TV's slice also expanded over that time, and TV remains the biggest ad medium.



Source: Publicis Groupe's ZenithOptimedia (Advertising Expenditure Forecasts, December 2015). Numbers rounded. ZenithOptimedia allocates ad spending according to where an ad appears. So "internet" includes all internet ad spending regardless of whether the property is run by a pure-play internet company, a newspaper or magazine publisher, a TV network or other venture. This means, for example, that "newspaper" share shown here captures print ad spending but excludes newspapers' digital advertising. More info: zenithoptimedia.com.

UNCLE JEREMY.
HE'S A LITTLE SELFIE-CENTERED.

JEREMY OLSEN // DISTRACTED PARTY PHOTOGRAPHER

Hmmm, what will he get his nephew Jason for his birthday? Probably something Uncle Jeremy will really like too. Good news: he has bucks to burn and loves to spoil Jason. Get to know shoppers like him with Neustar customer-target analysis. Draw from online and offline sources to segment with precision, locate look-alike audiences, and convert big spenders. **Learn how to get started at www.neustar.biz/winterfactpack.**

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COST FOR A 30-SECOND COMMERCIAL

Advertising Age's annual show-by-show guide to the price of TV commercials. Reflects fall 2015 schedule; cancellations noted.

Network	Time	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
ABC	7:00 PM	America's Funniest Home Videos $61,567						
	8:00 PM	Once Upon a Time 155,596	Dancing With the Stars $115,962	The Muppets $131,313 Fresh Off the Boat 120,133	The Middle $141,874 The Goldbergs 137,826	Grey's Anatomy $157,609	Last Man Standing $84,631 Dr. Ken 83,543	
	9:00 PM	Blood and Oil 127,923		Marvel's Agents of S.H.I.E.L.D. 134,707	Modern Family 239,993 Black-ish 155,990	Scandal 224,505	Shark Tank 99,631	
	10:00 PM	Quantico 120,387 The Family 119,973	Castle 113,149	~~Wicked City~~ 93,039	Nashville 95,871	How to Get Away With Murder 252,934	20/20 65,994	
CBS	7:00 PM	60 Minutes $111,298						
	8:00 PM	Madam Secretary 99,587	The Big Bang Theory $348,300 Supergirl 147,933 Life in Pieces 192,379	NCIS $151,738	Survivor $125,449	NFL Thursday Night Football $464,625	The Amazing Race $85,517	Crimetime Saturday $18,471
	9:00 PM	The Good Wife 97,428	Scorpion 142,108	NCIS: New Orleans 125,920	Criminal Minds 133,983	Mom 144,660 Angel From Hell 127,550	Hawaii Five-0 77,683	
	10:00 PM	CSI: Cyber 82,055	NCIS: Los Angeles 109,940	Limitless 113,900	Code Black 129,626	Elementary 106,695	Blue Bloods 75,965	48 Hours 33,831
FOX	7:00 PM	Bob's Burgers $74,733						
	8:00 PM	The Simpsons 186,050 Brooklyn Nine-Nine 129,892	Gotham $151,080	Grandfathered $115,136 The Grinder 101,392	Rosewood $88,678	Bones $94,681	Masterchef Junior $96,300	
	9:00 PM	Family Guy 164,933 The Last Man on Earth 131,045	Minority Report 120,388	Scream Queens 147,808	Empire 497,364	Sleepy Hollow 98,253		
	10:00 PM							
NBC	7:00 PM							Dateline Saturday Night Mystery NA
	8:00 PM	Sunday Night Football $603,000	The Voice $240,502	The Voice $233,720	The Mysteries of Laura $70,423	Heroes Reborn $126,830	Undateable $50,844	
	9:00 PM		Blindspot 209,700	Chicago Med 120,642	Law & Order: SVU 85,230	The Blacklist 193,793	Grimm 81,198	Saturday Night Live (Classic Encores) $25,242
	10:00 PM			Best Time Ever With Neil Patrick Harris 105,268	Chicago P.D. 121,061	~~The Player~~ 108,082	Dateline 47,261	
CW	7:00 PM							
	8:00 PM		Crazy Ex-Girlfriend $23,159	The Flash $70,687	Arrow $48,056	The Vampire Diaries $44,924	Reign $19,327	
	9:00 PM		Jane the Virgin 25,034	iZombie 34,674	Supernatural 35,631	The Originals 32,634	America's Next Top Model 17,082	

MIDSEASON SHOWS

ABC: Uncle Buck $60,557

FOX: American Idol $147,826

■ Midseason replacement

— Canceled

From "How much for a 30-second spot" (Sept. 28, 2015). Ad Age's survey is compiled using data from as many as six media-buying 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. These estimates also reflect the prices advertisers and networks agreed on in this year's upfront marketplace.

DIGITAL: 10 LARGEST U.S. MULTIPLATFORM DIGITAL MEDIA PROPERTIES

By October 2015 unique visitors in thousands.

RANK	PROPERTY	TOTAL UNIQUE VISITORS (000)
1	**Google sites**	245,919
2	**Facebook**	218,166
3	**Yahoo sites**	210,852
4	**Amazon sites**	189,830
5	**Microsoft sites**	182,641
6	**AOL**	174,791
7	**CBS Interactive**	144,033
8	**Comcast/NBC Universal**	143,251
9	**Apple**	140,011
10	**Mode Media**	136,037
Total digital population		**259,557**

Source: ComScore, October 2015. More info: comscore.com.

DIGITAL: 10 LARGEST U.S. DESKTOP ONLINE VIDEO PROPERTIES

By October 2015 unique viewers in thousands.

RANK	PROPERTY	TOTAL UNIQUE VIEWERS (000)
1	**Google sites**	173,722
2	**Facebook**	91,083
3	**Yahoo sites**	56,946
4	**Vimeo**	50,054
5	**Maker Studios**	47,617
6	**Vevo**	44,377
7	**ABC Digital**	40,617
8	**Warner Music**	39,893
9	**Comcast/NBC Universal**	36,499
10	**Microsoft sites**	34,035
Total desktop video audience		**194,126**

Source: ComScore, October 2015. More info: comscore.com.

NET U.S. MOBILE ADVERTISING REVENUE BY COMPANY

Estimates for selected companies, 2014-2017. Dollars in millions.

	ESTIMATED REVENUE FROM U.S. MOBILE ADVERTISING			
COMPANY	2014	2015	2016	2017
Amazon	$75.9	$127.0	$184.3	$248.0
Apple (iAd)	487.1	795.0	1,166.8	1,464.1
Facebook	3,541.8	5,896.8	8,082.7	10,320.0
Google	7,062.7	10,017.5	13,335.1	16,115.3
LinkedIn	54.4	146.8	198.8	254.6
Millennial Media	97.8	101.2	104.6	108.1
Pandora	559.7	737.0	926.0	1,125.1
Twitter	694.1	1,156.2	1,671.6	2,220.8
Yahoo	632.5	885.6	1,037.4	1,202.1
Yelp	131.7	212.3	284.1	377.7
YP	510.3	637.9	765.5	895.6
Other	5,299.9	9,731.9	14,257.6	16,505.9
Total	**$19,147.9**	**$30,445.1**	**$42,014.3**	**$50,837.3**

Source: eMarketer, September 2015. More info: emarketer.com.

TIME SPENT USING MEDIA

Average time spent per day with major media by U.S. adults, 2012-2017, in hours:minutes.
Time spent using digital media overtook time spent watching TV in 2013.

	AVERAGE MINUTES PER DAY					
MEDIUM	2012	2013	2014	2015	2016	2017
▼ TOTAL MEDIA	11:39	11:55	11:57	12:00	12:04	12:05
TV	4:38	4:31	4:22	4:11	4:03	3:58
Digital	4:10	4:48	5:09	5:29	5:45	5:56
Desktop/laptop	2:24	2:16	2:14	2:12	2:11	2:10
— Social networks	0:22	0:17	0:16	0:15	0:14	0:13
— Radio	0:07	0:06	0:06	0:06	0:06	0:06
— Video	0:20	0:22	0:23	0:24	0:25	0:25
— Other	1:35	1:31	1:28	1:27	1:26	1:25
Mobile (non-voice)	1:28	2:15	2:37	2:54	3:08	3:18
— Social networks	0:09	0:18	0:23	0:27	0:30	0:32
— Radio	0:26	0:32	0:39	0:44	0:49	0:52
— Video	0:09	0:17	0:22	0:26	0:29	0:32
— Other	0:44	1:08	1:14	1:17	1:20	1:22
Other connected devices	0:18	0:17	0:19	0:23	0:26	0:28
Print	0:40	0:35	0:32	0:30	0:28	0:27
— Magazines	0:17	0:15	0:13	0:13	0:12	0:11
— Newspapers	0:24	0:20	0:18	0:17	0:16	0:15
Radio	1:32	1:30	1:28	1:27	1:25	1:24
Other	0:38	0:31	0:26	0:24	0:22	0:21
▼ MORE DIGITAL						
Facebook	0:16	0:18	0:20	0:21	0:22	0:23
— Desktop/laptop	0:11	0:08	0:07	0:07	0:06	0:06
— Mobile	0:05	0:10	0:12	0:14	0:16	0:17
Digital radio	0:33	0:38	0:45	0:51	0:54	0:58
Pandora	0:17	0:20	0:24	0:26	0:28	0:30
Digital video	0:35	0:46	0:54	1:02	1:08	1:12
— Desktop/laptop	0:20	0:22	0:23	0:24	0:25	0:25
— Mobile	0:09	0:17	0:22	0:26	0:29	0:32
— Smartphone	0:04	0:07	0:10	0:12	0:14	0:16
— Tablet	0:04	0:10	0:12	0:14	0:15	0:16
— Other connected device	0:06	0:07	0:09	0:12	0:14	0:16

Source: eMarketer, September 2015. Time spent with each medium includes all time spent with that medium, regardless of multitasking.
For example, one hour of multitasking online while watching TV is counted as one hour of TV and one hour of online. More info: emarketer.com.

BIGGEST U.S. TV NETWORKS

By 2014 measured-media ad spending on each network. Dollars in millions.

BROADCAST TV

			% chg
1. CBS	CBS Corp.	$6,501	▼ -7.1%
2. NBC	Comcast Corp. (NBC Universal)	$6,080	▲ 21.8%
3. ABC	Walt Disney Co.	$4,978	▼ -2.5%
4. Fox	21st Century Fox	$4,791	▲ 2.7%
5. Univision	Univision Holdings	$3,277	▲ 7.6%
6. Telemundo	Comcast Corp. (NBC Universal)	$975	▼ -4.9%
7. UniMás	Univision Holdings	$537	▲ 3.6%
8. CW	CBS Corp. 50%/Time Warner 50%	$397	▼ -6.0%

CABLE TV

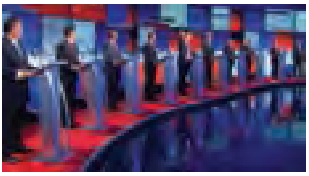
			% chg
1. TNT	Time Warner (Turner Broadcasting System)	$2,471	▲ 16.1%
2. ESPN	Walt Disney Co.	$2,440	▲ 5.1%
3. TBS	Time Warner (Turner Broadcasting System)	$1,502	▲ 4.5%
4. USA	Comcast Corp. (NBC Universal)	$1,203	▲ 15.0%
5. MTV	Viacom	$961	▲ 11.5%
6. Nick at Nite	Viacom	$838	▲ 32.9%
7. Bravo	Comcast Corp. (NBC Universal)	$794	▲ 0.8%
8. Comedy Central	Viacom	$763	▼ -8.3%
9. Nickelodeon	Viacom [1]	$749	▲ 5.4%
10. Discovery Channel	Discovery Communications	$734	▲ 5.4%

1. Excludes Nick at Nite. Source: Kantar Media. More info: kantarmedia.us.

VIEWERSHIP ON HIGH-PROFILE TV PROGRAMS

ZOMBIES

AMC's "Walking Dead" averaged more than 20 million viewers in the 2014-15 season (September-May), No. 6 among all broadcast and cable shows combined.



POLITICS

After the first GOP debate on Fox News Channel, which averaged 24 million people tuning in, viewership declined for each following debate.

PIGSKIN

The Super Bowl remains a steady ratings draw. The Feb. 1, 2015, game on NBC averaged 114.4 million viewers. CBS will carry Super Bowl 50 on Feb. 7.

HOLIDAYS

Holiday-themed programming reached more than 236 million viewers in 2014 with more than 1,000 hours of holiday-themed TV.

Source: Nielsen. More info: nielsen.com. Photos via AMC, Fox News, NBC and ABC.

THEY'RE REAL PEOPLE. DOES YOUR WEBSITE KNOW?

DAN & JODY WAGNER // CELEBRATING IN STYLE (THEIRS)

Besides giving each other a hard time, the Wagners give awesome presents. But would your website know what items to show when they birthday shop—a spot-on selection with pricing that makes sense? With Neustar, you can personalize the experience, even for first-time visitors, by using your customer data with our identity methodology. **For more ideas on reaching unique audiences, go to www.neustar.biz/winterfactpack.**

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AGENCIES

WORLD'S 10 LARGEST AGENCY COMPANIES

By worldwide revenue in 2014.

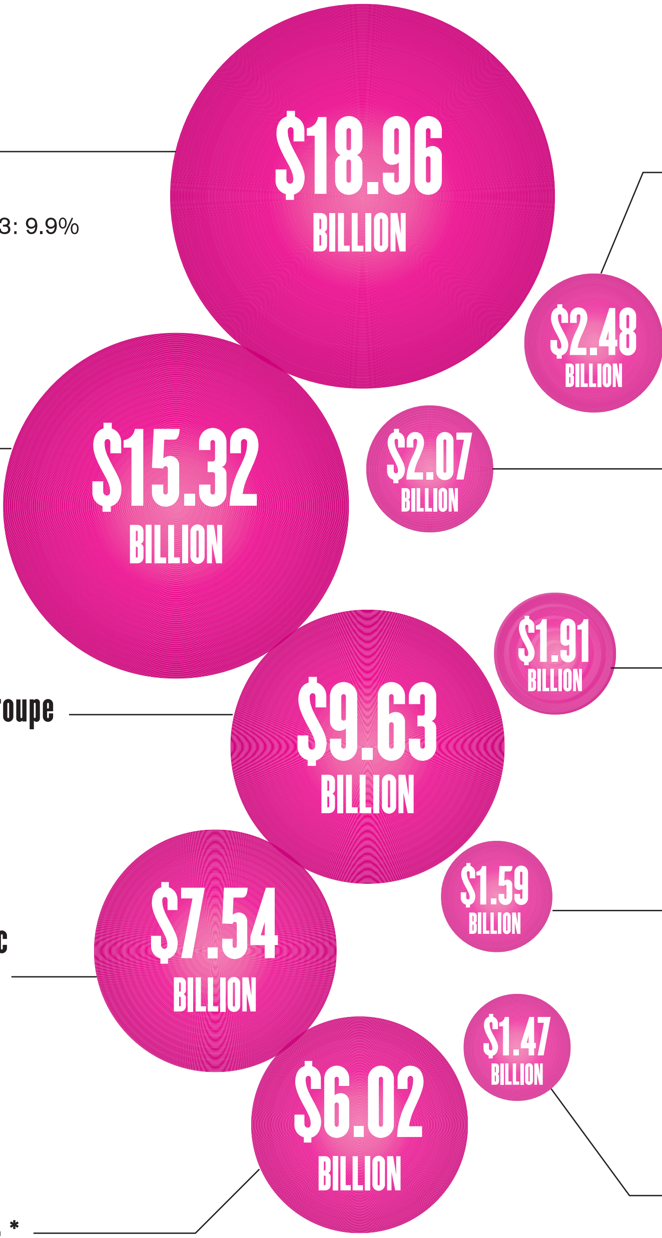
1. WPP
London
2014 vs. 2013: 9.9%

2. Omnicom Group
New York
5.0%

3. Publicis Groupe
Paris
4.3%

4. Interpublic Group of Cos.
New York
5.8%

5. Dentsu Inc.*
Tokyo
4.0%



6. Havas
Puteaux, France
5.3%

7. Alliance Data Systems Corp.'s Epsilon
Irving, Texas
6.2%

8. Hakuhodo DY Holdings*
Tokyo
3.9%

9. IBM Corp.'s IBM Interactive Experience*
Armonk, N.Y.
27.2%

10. Deloitte's Deloitte Digital*
New York
15.0%

From Agency Report 2015 (May 4, 2015, print edition). See expanded data at **AdAge.com/agencyfamilytrees2015**. Numbers rounded. Asterisk indicates Ad Age Datacenter estimate. Epsilon: Pro forma including revenue of Conversant (acquired December 2014).

WORLD'S LARGEST AGENCY NETWORKS

By 2014 estimated worldwide revenue. Dollars in millions.

RANK	NETWORK, COMPANY	SELECTED UNITS	WORLDWIDE REVENUE 2014	% CHG
1	**Young & Rubicam Group** WPP	Y&R, Burson-Marsteller, Cohn & Wolfe, Landor, Sudler & Hennessey, Wunderman	$3,670	2.2
2	**McCann Worldgroup** Interpublic Group of Cos.	McCann Erickson Worldwide, Martin Agency, McCann Health, Momentum Worldwide, MRM//McCann, Weber Shandwick	3,097	6.5
3	**DDB Worldwide Communications Group** Omnicom Group	DDB Worldwide, DDB Health/DDB Remedy, Interbrand, Rapp, TracyLocke, Tribal Worldwide	2,865	5.0
4	**Dentsu (Japan)** Dentsu Inc.	Dentsu Inc.'s network of agencies in Japan	2,775	-2.5
5	**BBDO Worldwide** Omnicom Group	BBDO Worldwide, Clemenger Group, Organic, Proximity	2,620	4.3
6	**Ogilvy & Mather** WPP	Ogilvy & Mather Advertising, Neo@Ogilvy, Ogilvy CommonHealth Worldwide, Ogilvy Public Relations, OgilvyOne Worldwide	2,432	4.6
7	**Epsilon** Alliance Data Systems Corp.	Epsilon, Catapult	2,074	6.2
8	**TBWA Worldwide** Omnicom Group	TBWA Worldwide, EG+ Worldwide, Integer Group, Zimmerman Advertising	1,881	2.2
9	**Publicis Worldwide** Publicis Groupe	Publicis Worldwide, Nurun	1,726	1.7
10	**IBM Interactive Experience** IBM Corp.	IBM Corp.'s digital services network	1,590	NA
11	**Dentsu Aegis Network** Dentsu Inc.	360i, Fetch, Firstborn, ICUC, iProspect, Isobar, McGarryBowen, Mitchell Communications Group, Mitchells, MKTG, Team Epic	1,582	-3.9
12	**Havas Creative Group** Havas	Havas Worldwide, Arnold Worldwide, Havas Health, Havas PR	1,537	3.6
13	**Deloitte Digital** Deloitte	Deloitte's digital services network	1,470	NA
14	**Accenture Interactive** Accenture	Accenture's digital services network	1,408	NA
15	**Leo Burnett Worldwide** Publicis Groupe	Leo Burnett Worldwide/Arc, Lapiz	1,380	1.1
16	**FCB (Foote, Cone & Belding)** Interpublic Group of Cos.	FCB, FCB Health, R/GA	1,304	0.8
17	**J. Walter Thompson Co.** WPP	J. Walter Thompson Co., JWT Inside, Mirum	1,264	3.0
18	**Hakuhodo** Hakuhodo DY Holdings	Hakuhodo, Red Peak Branding, SYPartners	1,243	6.8
19	**BlueFocus** BlueFocus Communication Group	BlueDigital, Vision7 International, We Are Social	1,095	50.3
20	**SapientNitro** Publicis Groupe	SapientNitro, Campfire, The Community	937	8.5
21	**Saatchi & Saatchi** Publicis Groupe	Saatchi & Saatchi, Conill, Saatchi & Saatchi X, Team One	922	2.0
22	**Experian Marketing Services** Experian	Experian's marketing-services business segment	881	0.8
23	**Grey Group** WPP	Grey, GHG, Wing	873	3.8
24	**DigitasLBi** Publicis Groupe	DigitasLBi, Lost Boys, Phonevalley	871	7.8
25	**Cheil Worldwide** Cheil Worldwide	Cheil Worldwide, Barbarian Group, Beattie McGuinness Bungay, Iris Worldwide, McKinney, Pengtai Greater China	845	6.9

From Agency Report 2015 (May 4, 2015, print edition). See expanded network holdings: **AdAge.com/agencyfamilytrees2015**. Expanded footnotes: **AdAge.com/agencyreport2015**. Source: Ad Age Datacenter estimates. Numbers rounded. Ranking and listing based on network configuration as of May 2015. Not all network units shown. Media agencies not included in this ranking. BlueFocus: Pro forma including Vision7 (acquired December 2014) and We Are Social (acquired March 2014). Cheil Worldwide: Pro forma including Iris Worldwide (acquired January 2015). Epsilon: Pro forma including Conversant (acquired December 2014). SapientNitro: Publicis Groupe bought SapientNitro parent Sapient Corp. in February 2015.

BIGGEST WORLDWIDE AGENCY VENTURES BY CATEGORY

By 2014 estimated worldwide revenue.

CATEGORY/LARGEST VENTURE, PARENT	WORLDWIDE 2014 REVENUE IN CATEGORY	% CHG	WORLDWIDE 2014 REVENUE TOTAL FOR CATEGORY	% CHG
AGENCY COMPANY **WPP**	$19.0 billion	9.9%	50 LARGEST AGENCY COMPANIES $84.4 billion	8.2%
CONSOLIDATED AGENCY NETWORK **Young & Rubicam Group** WPP	$3.7 billion	2.2%	25 LARGEST AGENCY NETWORKS $42.3 billion	4.1%
DIGITAL AGENCY NETWORK **IBM Interactive Experience** IBM Corp.	$1.6 billion	NA	15 LARGEST DIGITAL AGENCY NETWORKS $13.8 billion	NA
ADVERTISING AGENCY **Dentsu** Dentsu	$2.1 billion	-2.5%	10 LARGEST ADVERTISING AGENCIES $13.3 billion	2.6%
MEDIA AGENCY NETWORK **Starcom Mediavest Group** Publicis	$1.6 billion	12.8%	10 LARGEST MEDIA AGENCY NETWORKS $9.9 billion	7.4%
CRM/DIRECT AGENCY NETWORK **Epsilon** Alliance Data Systems Corp.	$1.3 billion	7.2%	10 LARGEST CRM/DIRECT AGENCY NETWORKS $8.0 billion	5.5%
PUBLIC RELATIONS AGENCY NETWORK **Edelman** DJE Holdings	$804 million	8.6%	10 LARGEST PUBLIC RELATIONS AGENCY NETWORKS $4.6 billion	6.4%

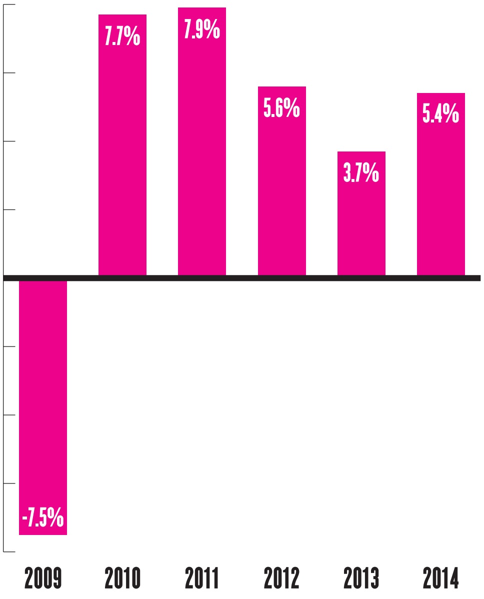
From Agency Report 2015 (May 4, 2015, print edition). Expanded rankings: **AdAge.com/agencyreport2015**. Source: Ad Age Datacenter estimates.

U.S. AGENCY GROWTH AND DIGITAL SHARE: 2009-2014

From Agency Reports.

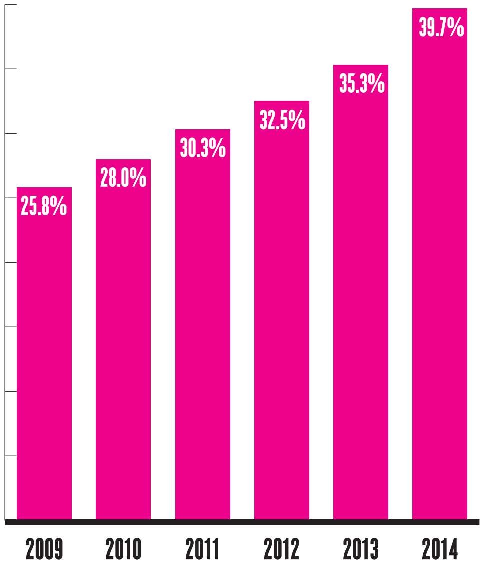
U.S. AGENCY REVENUE GROWTH

U.S. revenue for agencies from all disciplines grew 5.4% in 2014.



DIGITAL SHARE OF U.S. AGENCY REVENUE

Digital offerings accounted for nearly 40% of U.S. agency revenue in 2014.



Agency Reports' growth rates based on U.S. agencies from all disciplines. Digital's share of revenue for agencies of all disciplines.
Source: Ad Age Agency Reports. See more: **AdAge.com/agencyreport2015**.

BIGGEST U.S. AGENCY VENTURES BY CATEGORY

By 2014 estimated U.S. revenue.

CATEGORY/LARGEST VENTURE, PARENT	U.S. 2014 REVENUE IN CATEGORY	% CHG	U.S. 2014 REVENUE TOTAL FOR CATEGORY[1]	% CHG
AGENCY COMPANY **Omnicom Group**	$8.2 billion	7.7%	U.S. REVENUE OF WORLD'S 50 LARGEST AGENCY COMPANIES $36.6 billion	8.5%
CONSOLIDATED AGENCY NETWORK **Epsilon**[2] Alliance Data Systems Corp.	$2.0 billion	6.6%	U.S. REVENUE OF WORLD'S 25 LARGEST AGENCY NETWORKS $17.0 billion	5.0%
AGENCIES FROM ALL DISCIPLINES[3] **Epsilon**[4] Alliance Data Systems Corp.	$1.8 billion	4.9%	950 AGENCIES FROM ALL DISCIPLINES $43.6 billion	5.4%
ADVERTISING AGENCY **BBDO Worldwide** Omnicom	$577 million	4.5%	571 UNITS WITH AD AGENCY REVENUE $12.1 billion	4.4%
MEDIA AGENCY NETWORK **Starcom Mediavest Group** Publicis	$876 million	8.1%	15 LARGEST MEDIA AGENCY NETWORKS $3.2 billion	9.5%
DIGITAL AGENCY NETWORK **Epsilon**[5] Alliance Data Systems Corp.	$1.1 billion	6.9%	20 LARGEST DIGITAL AGENCY NETWORKS $8.5 billion	NA
SEARCH MARKETING **iCrossing** Hearst Corp.	$112 million	2.0%	236 UNITS WITH SEARCH-MARKETING REVENUE $1.3 billion	11.7%
MOBILE MARKETING **PwC's Digital Services**	$94 million	NA	241 UNITS WITH MOBILE-MARKETING REVENUE $1.4 billion	11.6%
CRM/DIRECT AGENCY NETWORK **Epsilon**[6] Alliance Data Systems Corp.	$1.3 billion	7.2%	228 UNITS WITH CRM/DIRECT-MARKETING REVENUE $7.4 billion	5.4%
PUBLIC RELATIONS AGENCY NETWORK **Edelman** DJE Holdings	$482 million	7.1%	239 UNITS WITH PUBLIC RELATIONS REVENUE $4.3 billion	5.3%
HEALTHCARE AGENCY NETWORK **Publicis Healthcare Comms. Group** Publicis	$627 million	16.5%	225 UNITS WITH HEALTHCARE REVENUE $4.3 billion	10.3%
PROMOTION AGENCY **IN Marketing Services** Advantage Sales and Marketing	$352 million	19.4%	258 UNITS WITH PROMOTION REVENUE $4.1 billion	5.8%
EXPERIENTIAL/EVENT MARKETING AGENCY **IN Marketing Services** Advantage Sales and Marketing	$352 million	19.4%	190 UNITS WITH EXPERIENTIAL/EVENT MARKETING REVENUE $2.4 billion	5.6%
HISPANIC-AMERICAN **Lopez Negrete Communications**	$42 million	26.3%	110 UNITS WITH HISPANIC-AMERICAN REVENUE $690 million	8.6%
AFRICAN-AMERICAN **GlobalHue**	$25 million	-7.3%	50 UNITS WITH AFRICAN-AMERICAN REVENUE $177 million	1.6%
ASIAN-AMERICAN **Gravity Media**	$23 million	3.0%	37 UNITS WITH ASIAN-AMERICAN REVENUE $129 million	7.7%

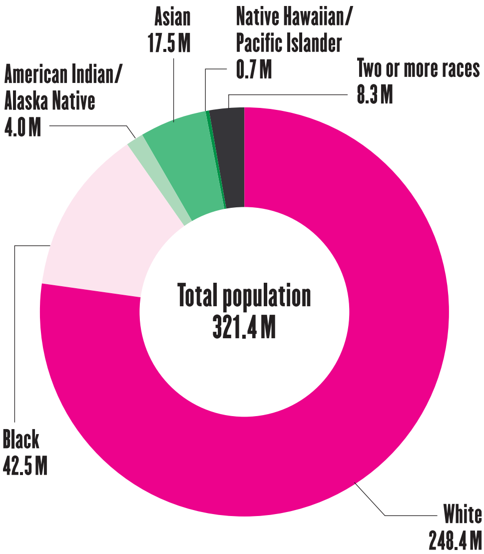
From Agency Report 2015 (May 4, 2015, print edition). See expanded rankings: **AdAge.com/agencyreport2015**.
Source: Ad Age Datacenter estimates.

1. Unit count in this column shows number of units (agencies) with U.S. revenue in this discipline in Agency Report 2015.
2. Consolidated agency network revenue.
3. All Disciplines ranking of 950 agencies from all disciplines in Agency Report 2015.
4. Agency revenue.
5. Digital agency network revenue.
6. CRM/direct agency network revenue.

CONSUMERS

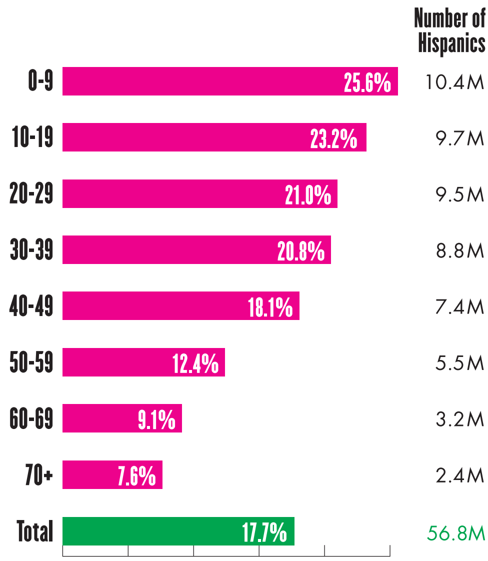
2015 U.S. POPULATION BY RACE

Population in millions.



2015 HISPANIC POPULATION BY AGE

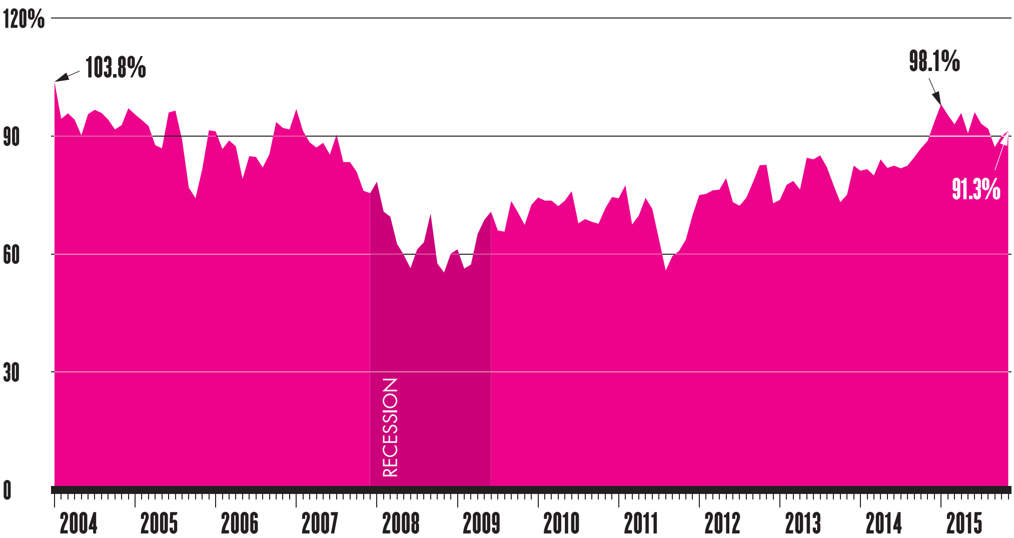
Hispanics account for more than one-fifth of the U.S. population for every age up to 41.



Source: Census Bureau. Projections for July 2015 from national projections released in December 2014. More info: census.gov.

CONSUMER CONFIDENCE: INDEX OF CONSUMER SENTIMENT

The University of Michigan index of consumer sentiment in January 2015 reached its highest final reading since 2004. The index stood at a still-strong 91.3 in November 2015.



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

HOW AMERICANS USE LEISURE TIME

Americans age 15+ on average had 5.3 hours of leisure time per day in 2014. Watching TV is by far the No. 1 leisure activity.

AVERAGE LEISURE HOURS IN 2014

AGE	ALL DAYS	WEEKDAYS	WEEKENDS, HOLIDAYS
15-19	5.7	5.3	6.9
20-24	5.5	5.1	6.4
25-34	4.3	3.7	5.8
35-44	4.1	3.5	5.5
45-54	4.8	4.1	6.2
55-64	5.5	4.9	6.7
65-74	6.9	6.6	7.7
75+	8.0	7.9	8.3
15+	5.3	4.8	6.5
Men	5.7	5.1	7.1
Women	4.9	4.5	5.9

AVERAGE WEEKDAY LEISURE HOURS SPENT IN 2014 ON...

AGE	WATCHING TV	SOCIALIZING AND COMMUNICATING	PLAYING GAMES AND COMPUTER USE FOR LEISURE
15-19	2.2	0.7	0.8
20-24	2.4	0.8	0.8
25-34	1.8	0.6	0.3
35-44	1.9	0.5	0.3
45-54	2.4	0.5	0.3
55-64	3.0	0.5	0.4
65-74	3.9	0.6	0.5
75+	4.4	0.6	0.5
15+	2.6	0.6	0.4
Men	2.8	0.6	0.5
Women	2.5	0.6	0.4

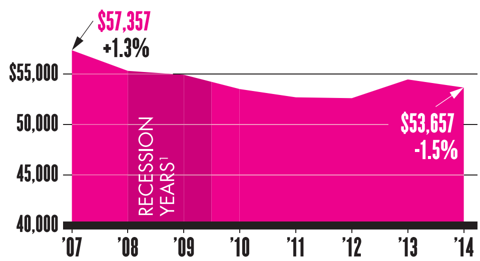
AVERAGE WEEKDAY LEISURE HOURS SPENT IN 2014 ON...

AGE	READING	PARTICIPATING IN SPORTS, EXERCISE AND RECREATION	RELAXING, THINKING	OTHER LEISURE AND SPORTS ACTIVITIES[1]
15-19	0.1	0.6	0.2	0.7
20-24	0.3	0.4	0.1	0.4
25-34	0.1	0.3	0.2	0.3
35-44	0.1	0.2	0.2	0.3
45-54	0.2	0.2	0.3	0.3
55-64	0.3	0.2	0.3	0.3
65-74	0.6	0.3	0.3	0.4
75+	1.1	0.2	0.7	0.3
15+	0.3	0.3	0.3	0.3
Men	0.3	0.4	0.3	0.4
Women	0.4	0.2	0.2	0.3

1. Including travel related to leisure and sports activities.
Source: Bureau of Labor Statistics' 2014 American Time Use Survey.
More info: bls.gov/tus.

MEDIAN HOUSEHOLD INCOME

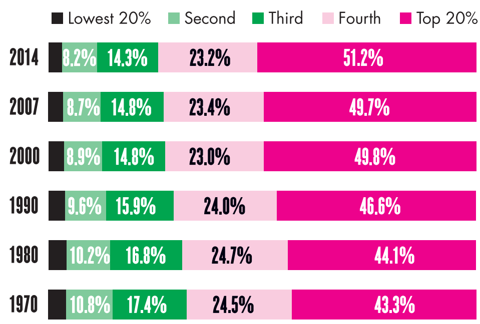
Median household income in inflation-adjusted 2014 dollars. Real median household income rose in only one year (2013) since the recession ended in 2009; it remains well below its prerecession level.



1. December 2007 to June 2009.
Source: Census Bureau's Current Population Survey
(Annual Social and Economic Supplements). More info: census.gov.

INCOME DISTRIBUTION AMONG HOUSEHOLDS RICH TO POOR

Share of aggregate income by household-income quintiles. The poorest quintile accounted for just 3.1% of income in 2014; the top fifth accounted for 51.2%.



MEAN INCOME FOR HOUSEHOLDS RICH TO POOR

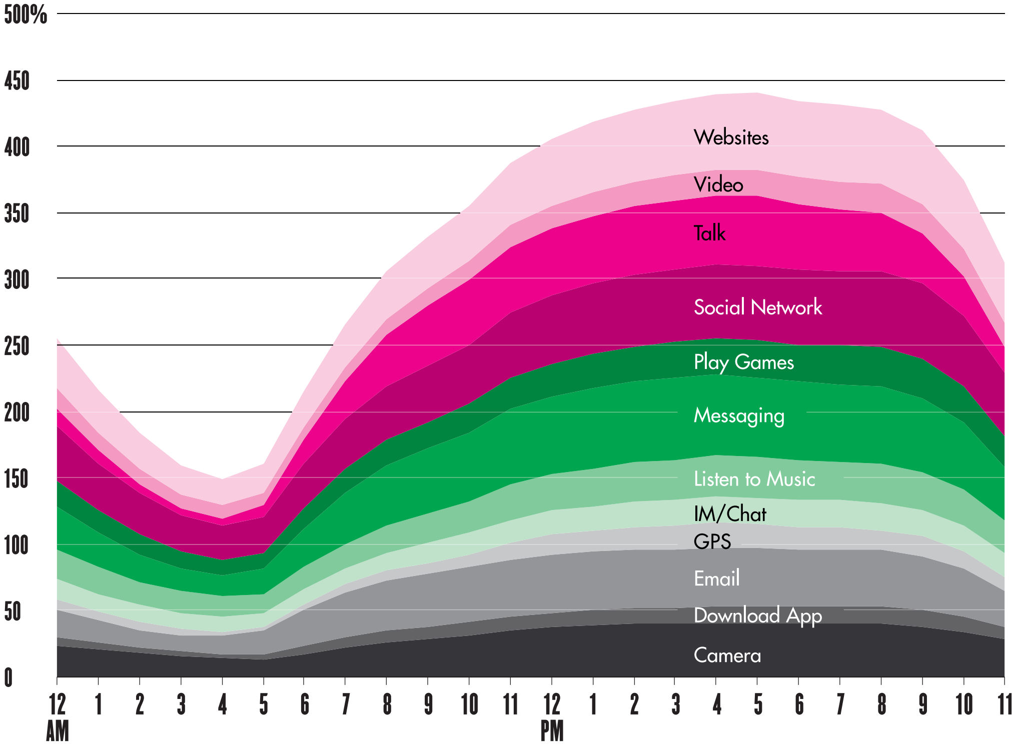
Mean (average) income for household-income quintiles in 2014; percent change vs. prerecession 2007. Rich households have rebounded faster than poor households.

	2014 MEAN INCOME	% CHANGE[1] VS. PRERECESSION 2007
Lowest 20%	$11,676	-11.5%
Second	31,087	-7.5%
Third	54,041	-5.3%
Fourth	87,834	-2.8%
Top 20%	194,053	1.2%
All households	**$75,738**	**-1.9%**

1. Percent change based on real (inflation-adjusted) mean income.
Source: Census Bureau's Current Population Survey
(Annual Social and Economic Supplements). More info: census.gov.

WHEN AND HOW SMARTPHONE OWNERS USE THEIR DEVICES

Messaging (SMS or MMS) is the most popular activity on smartphones. Peak hour for messaging is 3 p.m., when 61.6% of adult smartphone owners send or receive messages.



1. 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, 57.3% of smartphone owners use a phone for social networking between 8 p.m. and 9 p.m. at least once a week. Source: Experian Marketing Services' Simmons Connect. Adult smartphone users, spring 2015. More info: experian.com/marketingservices.

HOW TV VIEWERS ARE MULTITASKING

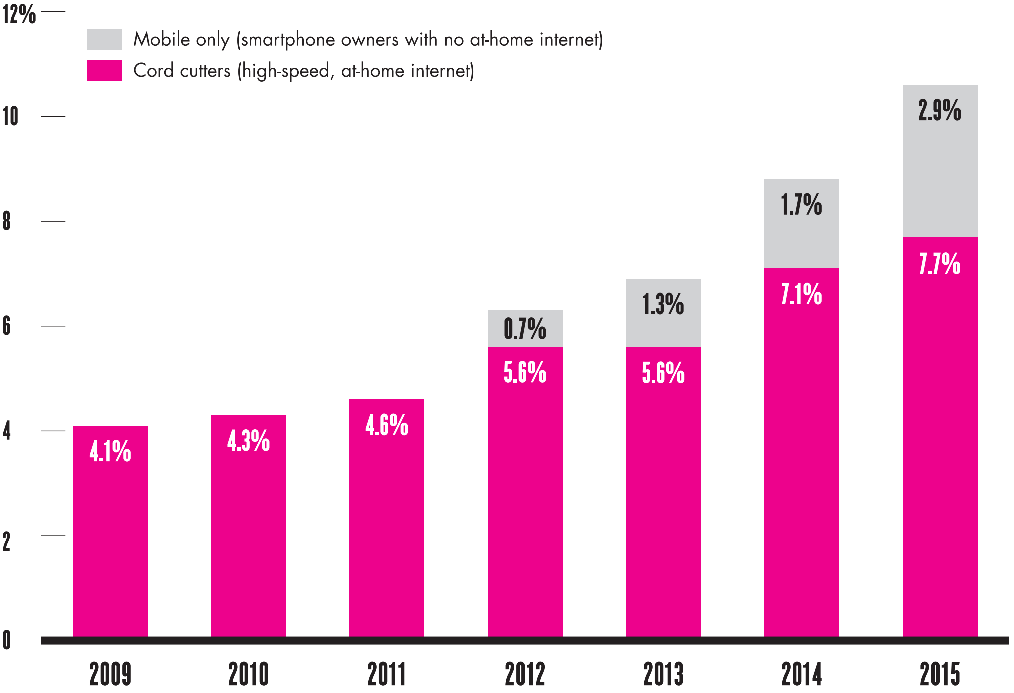
Percent of adults who do these activities while watching TV.

	VERY OFTEN	OFTEN	SOMEWHAT	NOT VERY OFTEN	NOT AT ALL
Email on computer	18.1%	14.5%	14.4%	12.0%	40.9%
IM/chat on computer	8.2	5.3	6.1	6.9	73.5
Listen to radio	7.6	4.6	5.4	8.4	74.1
Play games	6.0	4.7	4.6	5.7	79.0
Read magazine/comic	7.0	8.1	11.6	16.0	57.2
Talk on mobile phone	16.8	13.4	16.8	22.2	30.9
Text on mobile phone	21.9	15.0	17.5	14.4	31.2
Visit websites on computer	22.3	16.3	17.0	10.4	34.0
Visit websites on mobile phone	19.6	14.5	14.0	10.0	41.9
Watch videos on computer	7.5	4.6	5.5	9.7	72.7

Source: Experian Marketing Services' Simmons Connect. Results based on adult survey participants who answered question (and so results exclude nonresponses), spring 2015. More info: experian.com/consumerinsights.

CORD CUTTERS AND MOBILE-ONLY HOUSEHOLDS

Percent of households without paid TV services. One-tenth (10.6%) of households don't subscribe to cable or satellite TV but have access to online content either through at-home or mobile internet.



Source: Experian Marketing Services' Simmons Connect. U.S. households, spring 2015. Cord cutters include those with high-speed internet but not paid TV. Cord cutters also include cord-nevers (those who have never paid for TV). More info: experian.com/consumerinsights.

DEMOGRAPHICS OF CORD-CUTTER HOUSEHOLDS

Millennial households (those ages 18-34) make up 42.4% of all households not paying for TV, but just 22.9% of households overall. One-fifth (19.6%) of millennial households don't subscribe to cable or satellite TV[1].

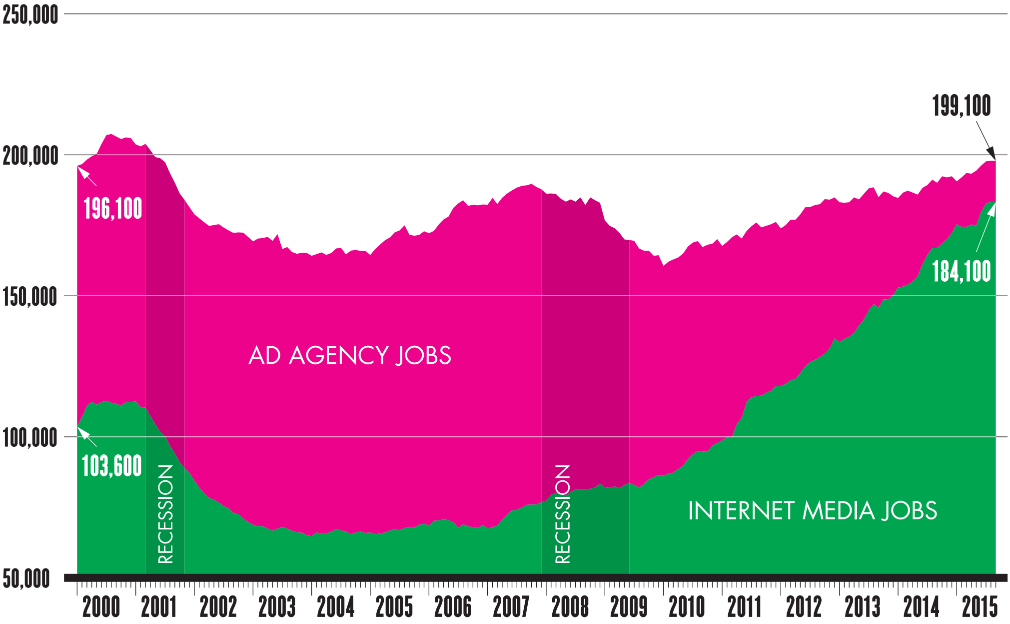
	TOTAL HOUSEHOLDS	TRADITIONAL CORD CUTTER[2]	MOBILE-ONLY[3]	CORD CUTTERS OR MOBILE-ONLY
Hispanic	13.9%	11.6%	15.7%	12.7%
Parents	26.6	29.2	35.5	30.9
18-34 (Millennials)	22.9	40.5	47.5	42.4
35-49 (Generation X)	23.0	29.6	20.9	27.3
50-69 (Boomers)	37.3	25.4	30.9	26.9
70+ (Silent generation)	16.8	4.5	<1.0	3.5
Non-millennials	77.1	59.5	52.5	57.6
Male	40.7	47.4	41.3	45.7
Female	59.3	52.6	58.7	54.3

Source: Experian Marketing Services' Simmons Connect. 1. These households do have access to online content either through at-home or mobile internet. 2. Households with high-speed internet service but no satellite or cable TV subscription. 3. Households with a smartphone but neither high-speed internet nor cable or satellite TV subscription. Cord cutters also include cord-nevers (those who have never paid for TV). More info: experian.com/consumerinsights.

JOBS

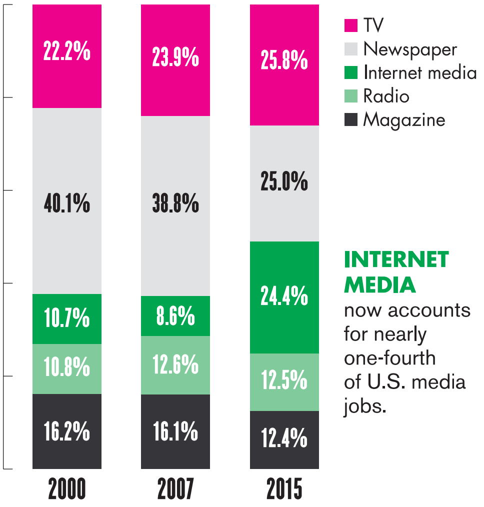
U.S. AD AGENCY AND INTERNET MEDIA EMPLOYMENT

Ad agency staffing (199,100 in October 2015) is at its highest point since 2001. Internet media[1] staffing (184,100) is at a record high and has more than doubled since 2010.



U.S. MEDIA EMPLOYMENT

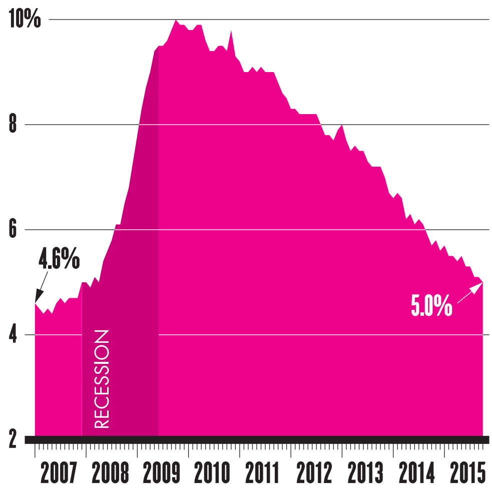
Share of media[2] jobs in 2000 (dot-com bubble), 2007 (eve of recession) and 2015.



INTERNET MEDIA now accounts for nearly one-fourth of U.S. media jobs.

U.S. UNEMPLOYMENT RATE

The nation's jobless rate (5.0% in November 2015) has fallen to half its recession-era peak (10.0% in October 2009) and is close to its prerecession level.



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

1. Internet media businesses and web-search portals.
2. TV, internet media, newspaper, magazine, radio. December 2000; November 2007; October 2015.

MARKETING ESSENTIALS

CHECKLIST: WHAT YOU NEED

These capabilities drive success in an omni-channel world.

AUTHORITATIVE IDENTITY

To paraphrase Lily Tomlin's telephone operator, marketers need to know "the party to whom I'm speaking." Authoritative identity is grounded in the offline world, is verified in real-time, and can be augmented to describe consumers as people, not as devices. Start by connecting the dots about your consumers and activate these insights across all channels. This gives you a single version of the truth, so you can segment, target, measure and perform attribution with consistent accuracy.

ONBOARDING

Savvy marketers know the value of matching existing first-party data. But would it surprise you to learn that anywhere between 50-70% of the information you get from CRM onboarding is "dirty data?" When you partner with an onboarding provider that uses an authoritative identity methodology you can utilize any identifiers in your CRM, not just email addresses. You can increase match rates by using absolute linkages, not hypothetical ones. The payoffs: better reach, more accurate targeting, and less marketing waste.

CUSTOMER TARGETING ANALYSIS

It starts with accurate, comprehensive data that works across all channels to help you identify audience attributes, customize segments, and target precisely. Great data deserve great analytics tools, so look for tools that tell you more than your CRM data can, providing linkages to valuable external information. Also good: analytics that make it easy to activate your segments across channels and devices.

neustar

TO SUCCEED

WEB PERSONALIZATION

It's one thing to personalize pages for authenticated visitors. It's even more powerful to do it for unauthenticated customers. You can achieve this by blending CRM data with third-party data that includes demographics and user preferences—products, brands, lifestyles, and more. The right identity layer will work with your personalization methods to deliver a targeted, relevant and privacy-friendly experience each and every time.

CLOSED LOOP

You understand the power of closed-loop analytics. But not all closed-loop solutions are created equally. To accurately credit sales across your growing channels, you need more accurate and scalable solutions that rely on authoritative identities, not purely digital identities or stale CRM data. Authoritative closed-loop solutions also give you the depth you need to properly describe your best customers and to understand which channels are driving more sales.

OMNI-CHANNEL REMARKETING

What if you could remarket to any unknown consumer, no matter what channel they've shown an interest through? With omnichannel remarketing, you can increase contact rates by recognizing unauthenticated consumers across platforms. You can also increase conversion rates by delivering targeted offers through multiple channels, including e-mail, web, and direct mail. Using authoritative identity, you can target across channels more effectively, not just spew out random ads and hope they connect. Personalize the message to maximize results.

HE'S PSYCHED HE GOT A ROCKET. SHE'S THRILLED IT'S NOT A DRONE.

ALISHA & JASON WAGNER // A BIRTHDAY WIN-WIN

He wanted a drone to rule the skies over their cul-de-sac. To find a smarter birthday gift, his mom did a little browsing. That triggered some timely remarketing ads, and some enterprising retailer swooped in for the sale. With Neustar, your remarketing can do even more, reconnecting not just through display ads but also emails, direct mail, and even call centers. **For more digital marketing insights, go to www.neustar.biz/winterfactpack.**

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