DECEMBER 19, 2016

AdvertisingAge

200,000
U.S. ad agency employment, the highest point for agency jobs since 2001

$1,333
U.S. media and marketing spending per person in 2017

35%
Internet's projected share of U.S.media spending in 2017, topping TV

$1T
2017 worldwide media and marketing spending forecast, hitting trillion mark for the first time

2017 EDITION

MARKETING FACT PACK

— Annual guide to marketers, media and agencies —

CRAIN
1916

ARE YOU FOCUSED?

PURPOSE. EMPATHY. DIVERSITY. PLAYBOOK. INTEGRATION. TALENT.

These are just a few of the areas that industry-leading marketers are focused on in 2017. What connects them all? A relentless focus on the customer.

In the connected world, successful marketing requires connected customer experiences.

It's time to move beyond cookies and clicks.

It's time for a deeper understanding of your customer—connecting people with the places and the things around them.

And the key to connection is identity. Not probabilistic or deterministic. You need authoritative identity that collects, correlates, corroborates and connects identity in real-time. If you don't get identity right, your people-based marketing will be wrong.

For over 20 years, Neustar has been focused on helping clients grow and guard their business with the most complete understanding of how to connect people, places and things through authoritative identity.

Ask Neustar how we can help you break down your data silos, design your own customer graph and help build your connected customer experiences.

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Connected CRM for 1st Party Data

Secure Data Lockers for 2nd Party Data

Syndicated Audiences for 3rd Party Data

OneID System for Identity Resolution

Know Your Customers Better

PlatformOne Identity Data Management Platform (IDMP)

Omnichannel Data Onboarding

Customer Data Cleanse & Append

Customer Scoring & Segmentation

Connect Across Customer Touchpoints

AdAdvisor Audience Targeting (Digital & Addressable TV)

Omnichannel Remarketing

Website Personalization

IP Geolocation Intelligence

Make Better Decisions & Measure ROI

MarketShare Strategy Resource Planning & Optimization

MarketShare Action Multi-Touch Attribution

MarketShare Benchmark Analytics

MarketShare Closed-Loop Measurement

www.neustar.biz/focus

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MARKETING FACT PACK 2016

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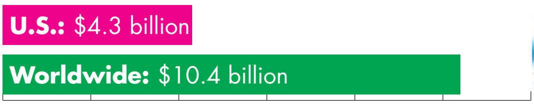
THE BIG LIST

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

1. PROCTER & GAMBLE CO.

BIGGEST ADVERTISER IN U.S. AND WORLD



in 2015 total ad spending

2. AT&T

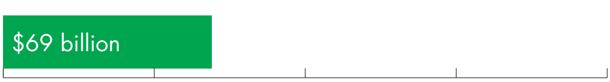
MOST-ADVERTISED U.S. BRAND

in 2015 measured-media spending

3. MEDIA SPENDING

2017 U.S. forecast: $198 billion, +3.8%

4. INTERNET AD SPENDING



2017 U.S. forecast: $69 billion, +14.6%

5. GOOGLE

BIGGEST U.S. DIGITAL MEDIA PROPERTY

unique visitors in October 2016 (all Google sites)

6. FACEBOOK

BIGGEST U.S. SOCIAL NETWORK ON MOBILE

174 million

unique visitors in June 2016

7. TV

TIME SPENT WATCHING TV IN 2015, AMERICANS AGE 15+

2.6

hours a day

8. WPP

WORLD'S BIGGEST AGENCY COMPANY

$19 billion

in revenue in 2015

9. YOUNG & RUBICAM GROUP

WORLD'S BIGGEST AGENCY NETWORK

$3.7 billion

in revenue in 2015

10. EPSILON

BIGGEST U.S. AGENCY

$1.9 billion

in revenue in 2015

Source: Ad Age Datacenter.

PURPOSE

“Great brands are built to stand the test of time—and great brands begin with purpose.”

ANTONIO LUCIO
CMO, HP

WHAT DO MARKETERS NEED TO FOCUS ON IN 2017?

“We all know the changes sweeping our industry... tomorrow will be more social, more digital, more global, more connected, more always on, more data deluged than yesterday. Within this storm of change, in marketing as in life, the words purpose and resilience leap to mind. For great brands are built to stand the test of time—and great brands begin with purpose. So in these times of rapid change, leadership to define and execute against a brand’s purpose is more important than ever. And the characteristic that stands above all else when I think about leadership, and the team we are building here at HP, is resilience. The ability to fall, pick yourself up, dust yourself off, learn what you can do better and continue moving toward our common goals.”

neustar®

MARKETERS

U.S. AND WORLDWIDE MEDIA ADVERTISING GROWTH RATES

PERCENT CHANGE IN AD SPENDING, 2012-2019.

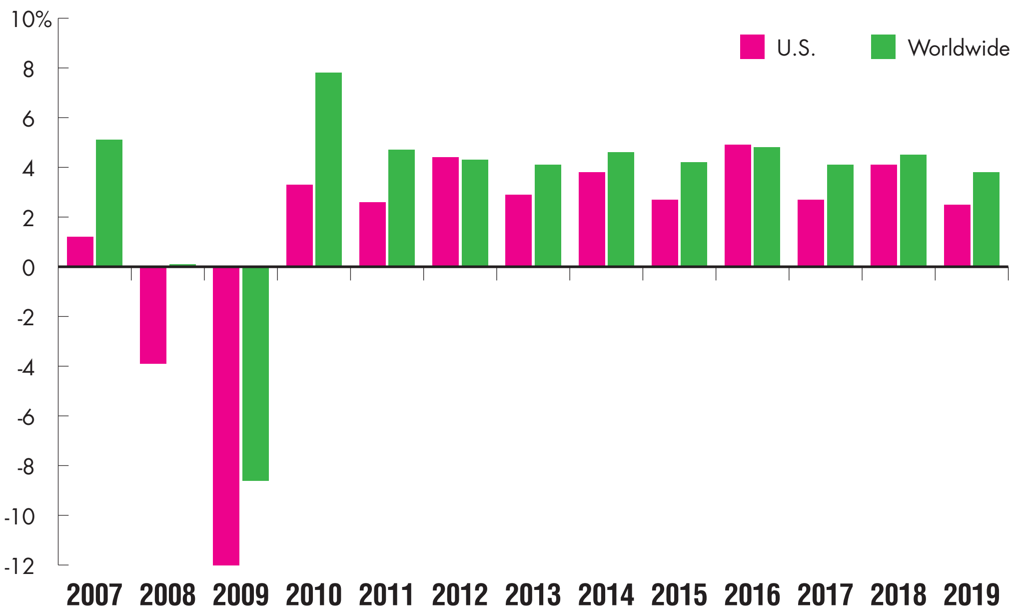
Forecasts and revised historic data. The average of GroupM, Magna and Zenith forecasts suggests U.S. ad spending growth of 2.7% in 2017, down from 4.9% in 2016, when spending got a boost from election ads and the Olympics. Consensus for worldwide ad spending: +4.1% in 2017 vs. +4.8% in 2016.

U.S.	2012	2013	2014	2015	2016	2017	2018	2019
GroupM (WPP)	3.8%	2.4%	3.1%	1.8%	3.2%	2.6%		
Magna (Interpublic)	4.8	2.4	3.4	2.6	6.9	1.7	4.8%	1.7%
Zenith (Publicis)	4.6	3.8	4.9	3.6	4.5	3.8	3.5	3.2
Average of GroupM, Magna and Zenith	**4.4%**	**2.9%**	**3.8%**	**2.7%**	**4.9%**	**2.7%**	**4.1%**	**2.5%**

Worldwide	2012	2013	2014	2015	2016	2017	2018	2019
GroupM	4.0%	3.9%	3.7%	3.9%	4.3%	4.4%		
Magna	4.5	4.0	4.9	4.0	5.7	3.6	4.5%	3.5%
Zenith	4.3	4.3	5.4	4.7	4.4	4.4	4.5	4.1
Average of GroupM, Magna and Zenith	**4.3%**	**4.1%**	**4.6%**	**4.2%**	**4.8%**	**4.1%**	**4.5%**	**3.8%**

AD SPENDING GROWTH IN U.S. AND WORLDWIDE

Average of GroupM, Magna and Zenith forecasts, 2007-2019.



Source: December 2016 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. Averages for 2018 and 2019 based on average of Magna and Zenith.
More info: groupm.com, magnaglobal.com, zenithmedia.com.

10 MOST-ADVERTISED BRANDS

Based on 2015 U.S. measured-media ad spending.

1. AT&T
AT&T
2015 vs. 2014:
-10.4%
$1.14 billion

2. Geico
Berkshire Hathaway
2015 vs. 2014:
-0.2%
$1.11 billion

3. Verizon
Verizon Communications
2015 vs. 2014:
-9.2%
$1.03 billion

4. McDonald's
McDonald's Corp.
2015 vs. 2014:
-11.8%
$802 million

5. Ford
Ford Motor Co.
2015 vs. 2014:
31.5%
$764 million

6. Chevrolet
General Motors Co.
2015 vs. 2014:
-13.2%
$732 million

7. T-Mobile
Deutsche Telekom (T-Mobile)
2015 vs. 2014:
12.7%
$708 million

8. Sprint
SoftBank Group Corp. (Sprint Corp.)
2015 vs. 2014:
-10.5%
$700 million

9. Nissan
Nissan Motor Co.
2015 vs. 2014:
4.3%
$690 million

10. Macy's
Macy's
2015 vs. 2014:
-7.9%
$664 million

From 200 Leading National Advertisers 2016 (June 27, 2016, print edition). See ranking of nation's 200 most advertised brands: **AdAge.com/lna2016**.

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.com.

25 BIGGEST U.S. ADVERTISERS

By 2015 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**	**2015**	**2014**	**% chg**	**2015**	**2014**	**% chg**
1	**Procter & Gamble Co.**, Cincinnati	$4,265	$4,435	-3.8%	$2,221	$2,700	-17.7%
2	**AT&T**, Dallas	3,866	3,858	0.2	1,700	1,795	-5.3
3	**General Motors Co.**, Detroit	3,495	3,220	8.6	1,418	1,561	-9.1
4	**Comcast Corp.**, Philadelphia	3,436	3,029	13.4	1,495	1,338	11.7
5	**Verizon Communications**, New York	2,749	2,526	8.8	1,041	1,138	-8.6
6	**Ford Motor Co.**, Dearborn, Mich.	2,678	2,467	8.5	1,027	795	29.2
7	**American Express Co.**, New York	2,349	2,328	0.9	235	216	8.9
8	**Fiat Chrysler Automobiles**, London	2,250	2,250	0.0	933	1,002	-6.9
9	**Amazon**, Seattle	2,198	1,790	22.8	417	381	9.4
10	**Samsung Electronics Co.**, Seoul, South Korea	2,123	2,103	0.9	612	618	-1.0
11	**Walmart Stores**, Bentonville, Ark.	2,090	1,940	7.7	689	885	-22.1
12	**JPMorgan Chase & Co.**, New York	2,063	1,903	8.4	260	305	-14.8
13	**Johnson & Johnson**, New Brunswick, N.J.	2,009	1,968	2.1	1,116	1,033	8.0
14	**L'Oréal**, Clichy, France	1,994	1,942	2.7	1,267	1,458	-13.1
15	**Pfizer**, New York	1,926	1,673	15.1	1,589	1,385	14.7
16	**Toyota Motor Corp.**, Toyota City, Japan	1,802	2,090	-13.8	964	1,118	-13.8
17	**Walt Disney Co.**, Burbank, Calif.	1,798	1,898	-5.3	661	756	-12.6
18	**Time Warner**, New York	1,690	1,527	10.7	1,048	963	8.9
19	**Berkshire Hathaway**, Omaha, Neb.	1,683	1,625	3.6	1,456	1,401	3.9
20	**Anheuser-Busch InBev**, Leuven, Belgium	1,683	1,568	7.3	533	519	2.6
21	**Capital One Financial Corp.**, McLean, Va.	1,651	1,464	12.7	292	314	-6.8
22	**21st Century Fox**, New York	1,633	1,584	3.1	671	737	-9.0
23	**Deutsche Telekom (T-Mobile)**, Bonn, Germany/Bellevue, Wash.	1,600	1,400	14.3	957	800	19.6
24	**Macy's**, Cincinnati	1,587	1,602	-0.9	719	796	-9.7
25	**Bank of America Corp.**, Charlotte, N.C.	1,573	1,584	-0.7	198	266	-25.5
	Total for the 25	**$56,189**	**$53,773**	**4.5%**	**$23,518**	**$24,278**	**-3.1%**

From 200 Leading National Advertisers 2016 (June 27, 2016, print edition). See expanded data and report methodology at **AdAge.com/lna2016**. See 200 Leading National Advertisers database including profiles, agency rosters and executives: **AdAge.com/marketertrees2016**.

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 and outdoor. More info: kantarmedia.com. Unmeasured spending figures are Ad Age Datacenter estimates including direct marketing, promotion, experiential marketing, co-op, coupons, catalogs, product placement and digital media. **Time Warner:** AT&T in October 2016 signed deal to buy Time Warner.

WORLD'S 25 LARGEST ADVERTISERS

By 2015 total worldwide advertising spending. Dollars in billions.

Rank	Marketer, headquarters	2015 total worldwide advertising spending
1	**Procter & Gamble Co.**, U.S.	$10.4
2	**Unilever**, Netherlands/U.K.	$8.9
3	**L'Oréal**, France	$8.2
4	**Volkswagen**, Germany	$6.6
5	**Comcast Corp.**, U.S.	$5.9
6	**General Motors Co.**, U.S.	$5.1
7	**Daimler**, Germany	$5.0
8	**Anheuser-Busch InBev**, Belgium	$4.8
9	**Nestlé**, Switzerland	$4.6
10	**LVMH Moët Hennessy Louis Vuitton**, France	$4.5
11	**Ford Motor Co.**, U.S.	$4.3
12	**Toyota Motor Corp.**, Japan	$4.1
13	**Coca-Cola Co.**, U.S.	$4.0
14	**Fiat Chrysler Automobiles**, U.K.	$3.9
15	**Amazon**, U.S.	$3.8
16	**AT&T**, U.S.	$3.6
17	**Samsung Electronics Co.**, South Korea	$3.4
18	**Bayer**, Germany	$3.3
19	**McDonald's Corp.**, U.S.	$3.3
20	**Nike**, U.S.	$3.3
21	**Sony Corp.**, Japan	$3.3
22	**Alphabet (Google)**, U.S.	$3.2
23	**American Express Co.**, U.S.	$3.1
24	**Pfizer**, U.S.	$3.1
25	**BMW Group**, Germany	$3.1
	World's Largest Advertisers: Top 25	**$116.8**
	World's Largest Advertisers: Top 100	**$240.5**

From World's Largest Advertisers 2016 (Dec. 5, 2016, print edition). See World's Largest Advertisers ranking of 100 companies and database with profiles, agency rosters and executives: **AdAge.com/globalmarketers2016**.

Source: Ad Age Datacenter. Total worldwide advertising spending based on Ad Age estimates and company disclosures. Numbers rounded. **Anheuser-Busch InBev:** Excludes SABMiller (acquired in October 2016). **McDonald's:** Estimated worldwide systemwide ad spending including spending from franchisees and company-owned restaurants. **Nike:** Year ended May 2016. **Procter & Gamble:** Estimated spending on advertising plus other marketing costs for year ended June 2016. **Sony, Toyota:** Year ended March 2016.

U.S. MARKET LEADERS BY CATEGORY

2015 share breakouts for marketers and brands. Dollars in millions.

AUTO MARKETERS

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

Rank	Marketer	Market share	Total U.S. ad spending
1	General Motors Co.	17.6%	$3,495
2	Ford Motor Co.	14.9	2,678
3	Toyota Motor Corp.	14.3	1,802
4	Fiat Chrysler Automobiles	12.9	2,250
5	Honda Motor Co.	9.1	1,034
6	Nissan Motor Co.	8.5	1,137
7	Hyundai Motor Co.	4.4	496
8	Kia Motors Corp.	3.6	649
9	Volkswagen	3.5	858
10	BMW Group	2.3	314
	Top 10	**91.1%**	**$14,713**
	Industry total *(vehicles sold in millions)*	*17.5*	**NA**

RETAILERS

Ranking based on total U.S. ad spending.

Rank	Marketer	Share of U.S. retail stores	Total U.S. ad spending
1	Amazon	1.8%	$2,197
2	Walmart Stores	11.2	2,090
3	Macy's	0.9	1,587
4	Target Corp.	2.3	1,472
5	Kohl's Corp.	0.6	1,171
6	Sears Holdings Corp.	0.8	850
7	J.C. Penney Co.	0.4	824
8	Home Depot	2.5	790
9	Lowe's Cos.	1.8	747
10	Best Buy Co.	1.2	683
	Top 10	**23.6%**	**$12,411**
	Industry total *(U.S. sales in trillions)*	*$3.2*	**NA**

AUTO BRANDS

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

Rank	Brand, marketer	Market share	Measured media
1	**Ford**, Ford Motor Co.	14.3%	$764
2	**Chevrolet**, General Motors Co.	12.2	732
3	**Toyota**, Toyota Motor Corp.	12.0	520
4	**Honda**, Honda Motor Co.	8.1	364
5	**Nissan**, Nissan Motor Co.	7.7	690
6	**Jeep**, Fiat Chrysler Automobiles	5.0	265
7	**Hyundai**, Hyundai Motor Co.	4.4	332
8	**Kia**, Kia Motors Corp.	3.6	329
9	**Subaru**, Fuji Heavy Industries	3.3	274
10	**GMC**, General Motors Co.	3.2	255
	Top 10	**73.7%**	**$4,526**
	Industry total *(vehicles sold in millions)*	*17.5*	**$7,975**

RESTAURANT CHAINS

U.S. market share based on systemwide sales.

Rank	Chain, marketer	Market share	Measured media
1	**McDonald's**, McDonald's Corp.	7.3%	$802
2	**Starbucks**, Starbucks Corp.	2.8	79
3	**Subway**, Doctor's Associates	2.3	445
4	**Taco Bell**, Yum Brands	1.9	366
5	**Burger King**, Restaurant Brands International	1.8	255
6	**Wendy's**, Wendy's Co.	1.8	285
7	**Dunkin' Donuts**, Dunkin' Brands Group	1.6	130
8	**Chick-fil-A**, Chick-fil-A	1.3	73
9	**Pizza Hut**, Yum Brands	1.1	179
10	**Panera Bread/ Saint Louis Bread Co.**, Panera Bread Co.	1.0	55
	Top 10	**22.9%**	**$2,670**
	Industry total *(U.S. sales in billions)*	*$490.8*	**$6,049**

From Ad Age's 200 Leading National Advertisers 2016 (June 27, 2016, print edition). Numbers rounded. Expanded footnotes and source information: **AdAge.com/lna2016**. Source: Total U.S. ad spending (measured media, excluding internet; plus unmeasured spending, including internet) from Ad Age Datacenter. U.S. measured-media spending, excluding internet, from WPP's Kantar Media. More info: kantarmedia.com.

Other sources: **Auto marketers:** Automotive News Data Center. More info: autonews.com. Market share is for cars and light trucks. Total U.S. ad spending for automakers. Excludes dealer advertising. **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. Includes all of automaker's measured-media advertising for that brand; excludes dealer advertising. Industry total: Ad spending is measured spending for automakers. **Retailers:** Census Bureau (U.S. retail sales). More info: census.gov. Amazon: Share shown is Ad Age Datacenter estimate. **Restaurant chains:** 2016 Technomic Top 500 Chain Restaurant Report (sales used to calculate market share). More info: technomic.com. Burger King, Chick-fil-A, Pizza Hut, Starbucks, Taco Bell and Wendy's based on estimated sales.

EMPATHY

“Put yourself in your customers’ shoes. Know them. Understand them. And anticipate and meet their needs.”

MARYAM BANIKARIM
CMO, Hyatt

WHAT DO MARKETERS NEED TO FOCUS ON IN 2017?

“Great brands are built by irrationally loyal consumers. And at Hyatt irrational loyalty is our goal. A critical step in accomplishing this goal requires a laser focus on your target customers. Put yourself in their shoes. Know them. Understand them. And anticipate and meet their needs. We spend a lot of time listening to our guests. Recently one our frequent guests told me that, “at Hyatt, I find a generosity of spirit.” This kind of relationship comes when we care for you to be your best—when we actively listen, empathize AND act on what you tell us. That is our secret sauce.”

neustar

U.S. MARKET LEADERS BY CATEGORY

2015 share breakouts for marketers and brands. Dollars in millions.

WIRELESS

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

Rank	Marketer	Market share	Measured media
1	Verizon Communications	32.6%	$795
2	AT&T	29.2	993
3	SoftBank Group Corp. (Sprint Corp.)	13.5	709
4	Deutsche Telekom (T-Mobile US)	13.1	931
5	América Móvil (TracFone Wireless)	8.6	186
6	Telephone and Data Systems (U.S. Cellular)	1.4	39
	Top 6	**98.4%**	**$3,654**
	All other	**1.6%**	**$1,251**
	Industry total *(subscribers in millions)*	*377.9*	**$4,905**

PRESCRIPTION DRUG BRANDS

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

Rank	Brand, marketer	Share of ad spending	Measured media
1	**Humira**, AbbVie	6.1%	$356
2	**Lyrica**, Pfizer	5.7	327
3	**Eliquis**, Bristol-Myers Squibb Co.	4.3	248
4	**Cialis**, Eli Lilly & Co.	3.8	217
5	**Xeljanz**, Pfizer	3.2	183
6	**Latuda**, Sumitomo Dainippon Pharma Co. (Sunovion)	2.6	151
7	**Prevnar**, Pfizer	2.3	136
8	**Harvoni**, Gilead Sciences	2.3	134
9	**Chantix**, Pfizer	2.3	133
10	**Viagra**, Pfizer	2.3	132
	Top 10	**34.8%**	**$2,016**
	Total prescription drug measured-media spending	**100.0%**	**$5,787**

From Ad Age's 200 Leading National Advertisers 2016 (June 27, 2016, print edition). Numbers rounded. Expanded footnotes and source information: **AdAge.com/lna2016**. Source: Total U.S. ad spending (measured media, excluding internet; plus unmeasured spending, including internet) from Ad Age Datacenter. U.S. measured-media spending, excluding internet, from WPP's Kantar Media. More info: kantarmedia.com.

Other sources: **Wireless:** U.S. network operator market share from ComScore MobiLens for subscribers age 13+, three months ended December 2015. Year-end 2015 subscriber connections (number of active devices) from CTIA; some users have more than one device. More info: comscore.com/MobiLensPlus; ctia.org. Ad spending for companies' wireless services; industry total spending includes ad spending by major phone suppliers (including Apple and Samsung Electronics). **Prescription drugs, personal care, household products:** Ad Age Datacenter analysis of U.S. measured-media spending. Coty in October 2016 bought Procter & Gamble Co.'s beauty products business including CoverGirl.

PERSONAL CARE BRANDS

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

Rank	Brand, marketer	Share of ad spending	Measured media
1	**L'Oréal Paris**, L'Oréal	8.0%	$501
2	**Maybelline New York**, L'Oréal	4.5	283
3	**Dove**, Unilever	3.2	199
4	**Neutrogena**, Johnson & Johnson	3.1	196
5	**Crest**, Procter & Gamble Co.	2.8	176
6	**Olay**, Procter & Gamble Co.	2.3	143
7	**Garnier**, L'Oréal	2.2	139
8	**CoverGirl**, Coty	1.9	121
9	**Aveeno**, Johnson & Johnson	1.9	119
10	**Colgate**, Colgate-Palmolive Co.	1.9	117
	Top 10	**31.9%**	**$1,995**
	Total personal care measured-media spending	**100.0%**	**$6,252**

HOUSEHOLD PRODUCT BRANDS

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

Rank	Brand, marketer	Share of ad spending	Measured media
1	**Clorox**, Clorox Co.	6.6%	$103
2	**Tide**, Procter & Gamble Co.	6.4	100
3	**OxiClean**, Church & Dwight Co.	6.0	93
4	**Energizer**, Energizer Holdings	4.8	75
5	**Febreze**, Procter & Gamble Co.	4.6	72
6	**Bounty**, Procter & Gamble Co.	4.3	67
7	**Charmin**, Procter & Gamble Co.	4.1	63
8	**Downy**, Procter & Gamble Co.	3.8	60
9	**Glade**, SC Johnson	3.7	58
10	**Arm & Hammer**, Church & Dwight Co.	3.3	51
	Top 10	**47.6%**	**$742**
	Total household product measured-media spending	**100.0%**	**$1,558**

U.S. MARKET LEADERS BY CATEGORY

2015 share breakouts for marketers and brands. Dollars in millions.

INSURANCE BRANDS

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

Rank	Brand, marketer	Share of ad spending	Measured media
1	**Geico**, Berkshire Hathaway	21.2%	$1,107
2	**State Farm**, State Farm Mutual Auto Insurance Co.	10.4	543
3	**Progressive**, Progressive Corp.	9.9	516
4	**Liberty Mutual**, Liberty Mutual Insurance Co.	6.8	354
5	**Nationwide**, Nationwide Mutual Insurance Co.	5.2	271
6	**Allstate**, Allstate Corp.	4.9	259
7	**UnitedHealthcare**, UnitedHealth Group	3.5	185
8	**Esurance**, Allstate Corp.	2.8	148
9	**USAA**, United Services Automobile Association	2.7	141
10	**Farmers Insurance**, Zurich Insurance Group	2.7	139
	Top 10	**70.0%**	**$3,662**
	Total insurance industry measured-media spending	**100.0%**	**$5,231**

BEVERAGE BRANDS

U.S. market share based on sales volume.

Rank	Brand, marketer	Market share	Measured media
1	**Coke**, Coca-Cola Co.	12.6%	$254
2	**Pepsi**, PepsiCo	6.1	165
3	**Mountain Dew**, PepsiCo	4.2	68
4	**Dr Pepper**, Dr Pepper Snapple Group	3.7	98
5	**Nestlé Pure Life**, Nestlé	3.4	0
6	**Gatorade**, PepsiCo	3.3	127
7	**Sprite**, Coca-Cola Co.	2.7	24
8	**Poland Spring**, Nestlé	2.4	0
9	**Dasani**, Coca-Cola Co.	2.2	11
10	**Aquafina**, PepsiCo	1.7	15
	Top 10	**42.3%**	**$763**
	Industry total *(gallons in billions)*	*31.8*	**$1,581**

CREDIT CARDS

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

Rank	Marketer	Market share	Measured media
1	American Express Co.	24.4%	$191
2	JPMorgan Chase & Co. (Chase)	19.1	123
3	Bank of America Corp.	10.5	89
4	Citigroup (Citibank)	8.0	110
5	Capital One Financial Corp.	7.4	250
6	Discover Financial Services	4.2	100
7	Wells Fargo & Co.	3.8	2
8	U.S. Bancorp (U.S. Bank)	3.8	0
9	Barclays	2.3	3
10	Synchrony Financial	1.5	0
	Top 10	**85.1%**	**$869**
	Industry total *(purchase volume, dollars in trillions)*	*$2.8*	**$1,115**

BEER MARKETERS

U.S. market share based on shipment volume.

Rank	Marketer	Market share	Measured media
1	Anheuser-Busch InBev	43.6%	$531
2	Molson Coors Brewing Co. (MillerCoors)	25.1	428
3	Constellation Brands	7.4	178
4	Heineken	3.9	151
5	Pabst Brewing Co.	2.6	1
6	Boston Beer Co.	2.0	59
7	D.G. Yuengling & Son	1.3	2
8	Florida Ice and Farm Co. (North American Breweries)	1.1	3
9	Diageo	1.1	16
10	Mark Anthony Group (Mike's Hard Lemonade)	0.8	1
	Top 10	**88.8%**	**$1,369**
	Industry total *(barrels in millions)*	*216.1*	**$1,388**

From Ad Age's 200 Leading National Advertisers 2016 (June 27, 2016, print edition). Numbers rounded. Expanded footnotes and source information: **AdAge.com/lna2016**. Source: Total U.S. ad spending (measured media, excluding internet; plus unmeasured spending, including internet) from Ad Age Datacenter. U.S. measured-media spending, excluding internet, from WPP's Kantar Media. More info: kantarmedia.com.

Other sources: **Insurance brands:** Ad Age Datacenter analysis of U.S. measured-media spending. **Credit cards:** The Nilson Report. More info: nilsonreport.com. Market share of general purpose credit cards based on total purchase volume in dollars for U.S. credit card issuers. U.S. measured-media spending for companies' credit cards; ad spending shown does not include internet and direct mail, which are pivotal for advertising in this category. **Beverage brands:** Beverage Marketing Corp. More info: beveragemarketing.com. **Beer marketers:** Beer Marketer's Insights (U.S. market share, U.S. industry sales). More info: beerinsights.com. Anheuser-Busch InBev in October 2016 bought SABMiller; as part of the deal, Anheuser-Busch InBev sold SABMiller's 58% MillerCoors stake to 42% owner Molson Coors Brewing Co., giving Molson Coors 100% ownership of MillerCoors.

ZENITH'S 2017 U.S. SPENDING FORECAST: $435B

Estimated spending in major media and marketing services. Zenith expects U.S. internet ad spending to pass TV in 2017, making internet the biggest ad medium. Zenith forecasts media spending to grow 3.8% to $198 billion in 2017. It expects 2017 total media and marketing-services spending to reach a record $435 billion—$1,333 per person in the U.S.

MAJOR MEDIA

Sector	2017 spending ($ billions)	2017 vs. 2016 % chg	2016 vs. 2015 % chg
Internet	$69.2	14.6%	16.9%
TV	68.6	0.6	2.1
Radio	17.6	0.0	0.0
Newspaper	16.6	-9.0	-8.0
Magazine	15.9	-4.5	-4.5
Outdoor and cinema	10.2	4.1	4.1
Total: major media	**$198.1**	**3.8%**	**4.5%**

MARKETING SERVICES

Sector	2017 spending ($ billions)	2017 vs. 2016 % chg	2016 vs. 2015 % chg
Sales promotion	$79.9	3.5%	3.5%
Telemarketing	57.9	3.0	3.0
Direct mail	48.8	-1.2	-0.8
Event sponsorship	37.4	6.8	7.4
Directories	8.0	-0.4	-0.6
Public relations	5.3	7.0	7.4
Total: marketing services	**$237.3**	**2.8%**	**2.9%**
Total: major media and marketing services	**$435.4**	**3.3%**	**3.6%**

Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2016). Numbers rounded. More info: zenithmedia.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 billions.

	Kantar measured-media spending for total U.S.			200 LNA measured-media and unmeasured spending		
Medium	2015	2014	% chg	2015	2014	% chg
Consumer, Sunday, B-to-B and local magazine	$20.6	$22.0	-6.2%	$8.5	$9.1	-5.9%
National and local newspaper; free-standing insert	13.9	16.2	-14.6	3.2	4.0	-19.6
Network TV	27.4	27.7	-1.0	22.1	22.1	-0.2
Spot TV	15.8	16.8	-6.2	4.9	5.1	-4.0
Syndicated TV	5.0	5.2	-3.1	3.6	3.7	-2.9
Cable TV networks	27.8	28.1	-1.2	18.1	18.0	0.5
Network, national spot and local radio	7.2	6.9	5.1	2.8	2.7	3.3
Outdoor	5.1	5.1	0.5	1.3	1.3	-0.4
Measured media	**$122.8**	**$127.9**	**-4.0%**	**$64.5**	**$66.0**	**-2.3%**
Unmeasured spending	**NA**	**NA**	**NA**	**$78.0**	**$71.4**	**9.1%**
Total U.S. spending	**NA**	**NA**	**NA**	**$142.5**	**$137.5**	**3.6%**

From 200 Leading National Advertisers 2016 (June 27, 2016, print edition). See full report and methodology: **AdAge.com/lna2016**.
See 200 LNA database including profiles, agency rosters and executives: **AdAge.com/marketertrees2016**.

Source: Ad Age Datacenter. Measured-media spending by medium from WPP's Kantar Media. More info: kantarmedia.com. Broadcast network TV includes Spanish-language networks. Consumer magazine includes Spanish-language magazines. Local newspaper includes Spanish-language newspapers. Outdoor includes outdoor and cinema for total U.S.; 200 LNA is outdoor without cinema. Unmeasured spending figures are Ad Age Datacenter estimates for 200 LNA from 200 Leading National Advertisers report. Unmeasured spending for the LNA 2016 report includes internet display advertising. Previous LNA reports included internet display advertising among measured media.

GROUPM'S 2017 WORLDWIDE SPENDING FORECAST: $1T

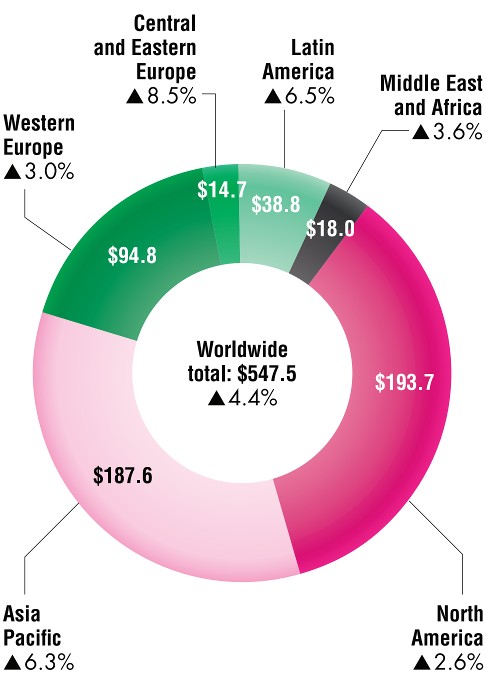
Estimated spending in media and marketing. GroupM forecasts that 2017 worldwide spending on media and marketing for the first time will top $1 trillion—$136 per person. Media spending in 2017 will account for 54.5% of worldwide media and marketing spending, according to GroupM; marketing spending will capture 45.5%.

MEDIA Sector	2017 spending ($ billions)	2017 vs. 2016 % chg	2016 vs. 2015 % chg	MARKETING Sector	2017 spending ($ billions)	2017 vs. 2016 % chg	2016 vs. 2015 % chg
Digital	$182.4	13.3%	14.6%	Direct	$331.5	3.2%	4.3%
TV	223.9	2.2	2.8	Sponsorship	62.0	3.0	4.7
Radio	23.2	1.6	1.6	Data investment management (market research)	45.7	1.5	1.5
Newspaper	48.2	-6.6	-8.9	Public relations	13.1	4.2	3.8
Magazine	35.9	-4.4	-4.4	Healthcare	5.1	2.0	2.4
Outdoor and cinema	34.0	4.3	5.1				
Total: media	**$547.5**	**4.4%**	**4.3%**	**Total: marketing**	**$457.4**	**3.0%**	**4.1%**
Total: media and marketing					**$1,004.9**	**3.8%**	**4.2%**

Source: WPP's GroupM (This Year, Last Year, December 2016). Numbers rounded. More info: groupm.com.

WORLDWIDE AD SPENDING BY REGION FROM GROUPM

Media spending in 2017 and percent change vs. 2016. Dollars in billions.



Source: WPP's GroupM (This Year, Last Year, December 2016). Media: TV, digital, newspaper, magazine, radio, outdoor, cinema. Numbers rounded. More info: groupm.com.

WORLD'S 10 LARGEST AD MARKETS FROM GROUPM

Ad spending forecast by country for 2017. The U.S., home to 4.4% of the world population, will account for more than one-third of 2017 worldwide media spending. China, home to about 19% of the world population, is forecast to account for 15.8% of media spending.

Rank	Market	2017 spending ($ billions)	2017 vs. 2016 % chg	Share of world
1	U.S.	$183.5	2.6%	33.5%
2	China	86.3	7.8	15.8
3	Japan	46.8	3.0	8.5
4	U.K.	23.1	7.2	4.2
5	Brazil	21.3	1.8	3.9
6	Germany	19.0	1.0	3.5
7	France	12.2	0.8	2.2
8	Australia	12.1	4.2	2.2
9	Canada	10.1	3.0	1.9
10	India	9.6	12.5	1.7
Top 10		**$423.9**	**4.0%**	**77.4%**
Total: media worldwide		**$547.5**	**4.4%**	**100.0%**

Source: WPP's GroupM (This Year, Last Year, December 2016). Numbers rounded. More info: groupm.com.

MEDIA

SHARE OF U.S. AD SPENDING BY MEDIUM FROM ZENITH

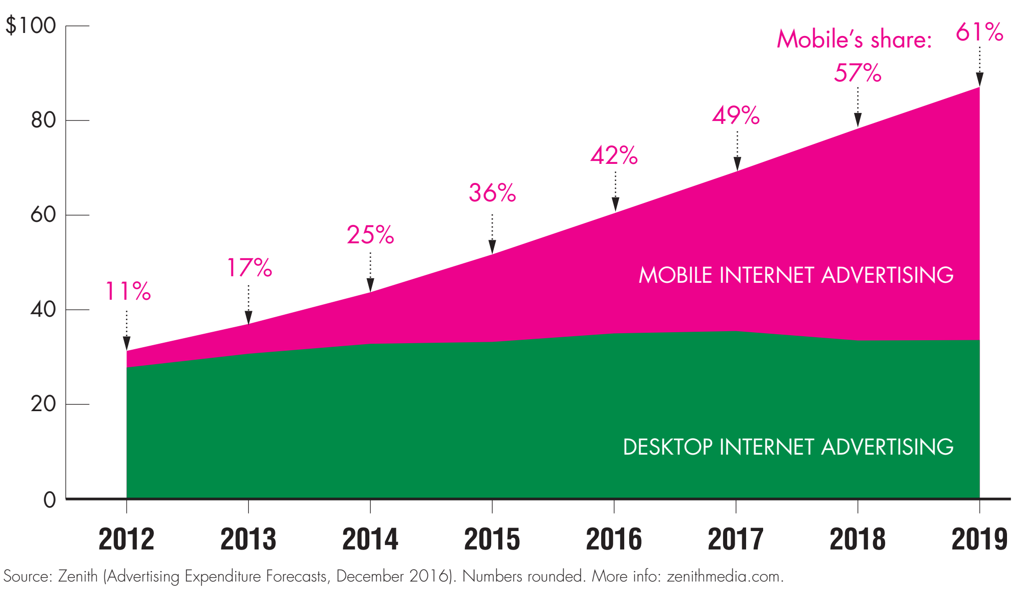
The internet is on track to pass TV as the largest U.S. ad medium in 2017. Zenith's forecasts show the internet's share will reach 41.2% in 2019, up from 8.2% in prerecession 2007.

Year	Internet	TV	Radio	Magazine	Newspaper	Outdoor and cinema
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	**31.6**	35.7	9.2	8.7	9.6	5.1
2017	**34.9**	34.6	8.9	8.0	8.4	5.2
2018	**38.2**	33.3	8.6	7.4	7.4	5.1
2019	**41.2**	32.0	8.3	6.8	6.6	5.1

Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2016). Numbers rounded. Zenith 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: zenithmedia.com.

MOBILE'S SHARE OF U.S. INTERNET AD SPENDING FROM ZENITH

U.S. internet ad spending, consisting of desktop internet and mobile internet advertising. Mobile will capture more than half of internet ad spending in 2018. Dollars in billions.



Source: Zenith (Advertising Expenditure Forecasts, December 2016). Numbers rounded. More info: zenithmedia.com.

WHAT DO MARKETERS NEED TO FOCUS ON IN 2017?

"In 2017, recognizing a more diverse marketplace is essential. And marketing to multicultural, millennial and mobile audiences requires finding the suitable brand ambassador with the right messaging that communicates content to them in a truly meaningful way and if you've done that well they will feel compelled to evangelize on your brand's behalf. And to be clear, this isn't as easy as it sounds...authenticity is everything here...and it cuts both ways. You have to really understand how your brand shows up to these consumers, be certain of your messaging and approach before you try to engage them or it can easily backfire."

www.neustar.biz/focus

neustar

COST FOR A 30-SECOND COMMERCIAL

Advertising Age's annual show-by-show guide to the price of TV commercials. Reflects fall 2016 schedule.

Network	Time	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
abc	7:00 PM	**America's Funniest Home Videos** $62,363						
	7:30 PM							
	8:00 PM	**Once Upon a Time** $109,410	**Dancing with the Stars** $125,260	**The Middle** $124,787	**The Goldbergs** $144,210	**Grey's Anatomy** $193,210	**Last Man Standing** $75,576	**Saturday Night Football** $87,084
	8:30 PM			**American Housewife** $94,615	**Speechless** $136,859		**Dr. Ken** $64,228	
	9:00 PM	**Secrets and Lies** $99,101		**Fresh off the Boat** $101,386	**Modern Family** $224,571	**Notorious** $144,274	**Shark Tank** $99,553	
	9:30 PM			**The Real O'Neals** $71,869	**Black-ish** $139,483			
	10:00 PM	**Quantico** $106,074	**Conviction** $109,662	**Marvel's Agents of S.H.I.E.L.D.** $107,904	**Designated Survivor** $162,616	**How to Get Away with Murder** $178,339	**20/20** $79,149	
	10:30 PM							
CBS	7:00 PM	**60 Minutes** $115,630						
	7:30 PM							
	8:00 PM	**NCIS: Los Angeles** $108,145	**The Big Bang Theory** $289,136 **Kevin Can Wait** (8:00 pm/ 8:30 pm) $160,635	**NCIS** $152,942	**Survivor** $128,723	**The Big Bang Theory** $289,136 **NFL Thursday Night Football** $522,910	**MacGyver** $72,310	**Crimetime Saturday** $24,546
	8:30 PM		**Man With A Plan** $126,490			**The Great Indoors** $144,312		
	9:00 PM	**Madam Secretary** $101,778	**2 Broke Girls** $138,203	**Bull** $136,102	**Criminal Minds** $127,179	**Mom** $121,116	**Hawaii Five-0** $76,520	**Crimetime Saturday** $24,546
	9:30 PM		**The Odd Couple** $108,438			**Life in Pieces** $140,946		
	10:00 PM	**Elementary** $78,346	**Scorpion** $109,988	**NCIS: New Orleans** $97,033	**Code Black** $103,300	**Pure Genius** $87,584	**Blue Bloods** $74,368	**48 Hours** $31,038
	10:30 PM							
FOX	7:00 PM							
	7:30 PM	**Bob's Burgers** $65,903						

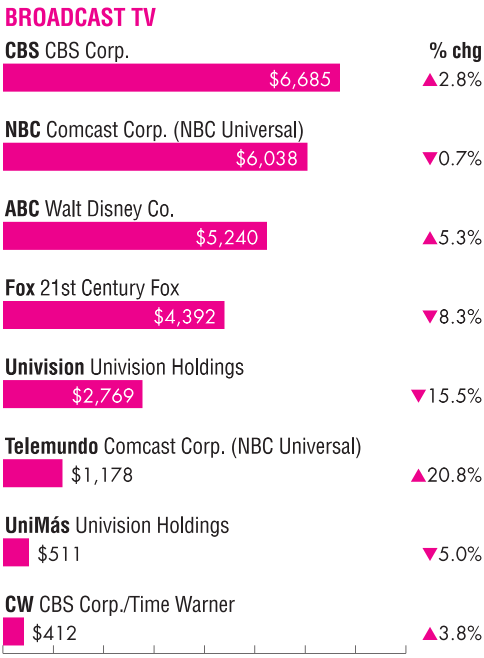
	7:30 PM	**Bob's Burgers** $[illegible]						
	8:00 PM	**The Simpsons** $161,633	**Gotham** $130,674	**Brooklyn Nine-Nine** $100,822 **New Girl** (8:00 pm/ 8:30 pm) $135,100	**Lethal Weapon** $172,429	**Rosewood** $83,430	**Hell's Kitchen** $78,566	
	8:30 PM	**Son of Zorn** $140,987						
	9:00 PM	**Family Guy** $132,467	**Lucifer** $126,798	**Scream Queens** $122,219	**Empire** $437,100	**Pitch** $93,554	**The Exorcist** $52,176 **Sleepy Hollow** $65,282	
	9:30 PM	**The Last Man on Earth** $94,293						
	10:00 PM							
	10:30 PM							
NBC	7:00 PM							**Dateline Saturday Night Mystery** $38,841
	7:30 PM							
	8:00 PM	**Sunday Night Football** $673,664	**The Voice (Monday)** $214,079	**The Voice (Tuesday)** $202,600	**Blindspot** $134,629	**Superstore** $87,707 **Thursday Night Football** $485,695	**Caught on Camera with Nick Cannon** $44,398	
	8:30 PM					**The Good Place** $93,992		
	9:00 PM			**This Is Us** $272,000	**Law & Order: SVU** $124,452	**Chicago Med** $135,535	**Grimm** $76,060	
	9:30 PM							
	10:00 PM		**Timeless** $188,046	**Chicago Fire** $164,133	**Chicago P.D.** $119,088	**The Blacklist** $145,122	**Dateline** $53,323	**Saturday Night Live Encores** $31,767
	10:30 PM							
THE CW	8:00 PM		**Supergirl** $54,667	**The Flash** $60,660	**Arrow** $40,368	**DC's Legends of Tomorrow** $37,033	**The Vampire Diaries** $24,929	
	8:30 PM							
	9:00 PM		**Jane the Virgin** $25,075	**No Tomorrow** $28,004	**Frequency** $31,858	**Supernatural** $28,300	**Crazy Ex-Girlfriend** $14,309	
	9:30 PM							

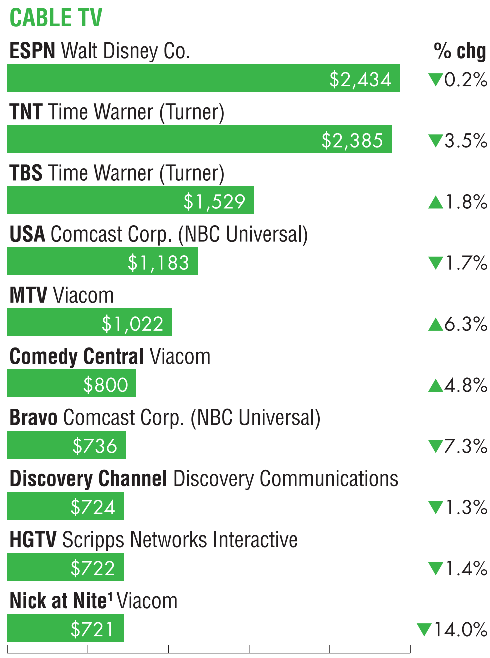
Source: From **AdAge.com/pricingchart** (summary in Oct. 3, 2016, print edition).

HOW WE GENERATE THE DATA: Ad Age's survey is compiled using data from as many as six 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 have with a network. Most TV advertising is typically purchased as part of larger negotiations, not on a one-off basis. These estimates also reflect the prices advertisers and networks agreed on in the 2016 upfront marketplace. Prices have likely changed for those wishing to buy a spot closer to the air date in the so-called "scatter" market.

BIGGEST U.S. TV NETWORKS

By 2015 measured-media ad spending on each network. Dollars in millions.





Source: Kantar Media. More info: kantarmedia.com. AT&T in October 2016 signed deal to buy Time Warner. 1. Excludes Nickelodeon.

WORLD SERIES: HIGHEST AND LOWEST TV RATINGS

Based on average TV ratings for World Series since 1968. For comparison, table shows 2016, when the Chicago Cubs won the World Series for the first time since 1908. Ratings in 2016 (average: 13.1%) were the highest since 2004 (average: 15.8%), when the Boston Red Sox vanquished their own curse by winning their first World Series since 1918.

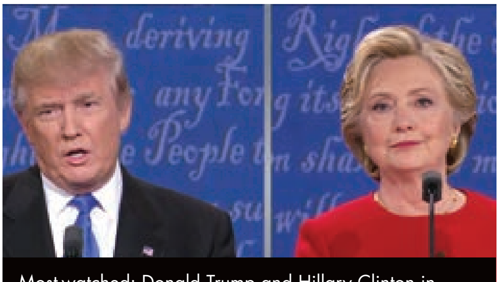
	Year	Winner/loser	Rating %	Share %	Number of viewers (persons 2+ in millions)	Number of households (millions)
	2016	**Chicago Cubs/Cleveland Indians**	**13.1**	**23**	**23.4**	**15.5**
TOP 5 ▼						
1	1978	New York Yankees/Los Angeles Dodgers	32.8	56	44.3	24.5
2	1980	Philadelphia Phillies/Kansas City Royals	32.8	56	42.3	25.4
3	1973	Oakland Athletics/New York Mets	30.7	57	34.8	20.3
4	1981	Los Angeles Dodgers/New York Yankees	30.0	49	41.4	24.5
5	1977	New York Yankees/Los Angeles Dodgers	29.8	53	37.2	21.7
BOTTOM 5 ▼						
5	2015	Kansas City Royals/New York Mets	8.7	16	14.7	10.1
4	2010	San Francisco Giants/Texas Rangers	8.4	14	14.3	9.7
3	2014	San Francisco Giants/Kansas City Royals	8.2	14	13.8	9.6
2	2008	Philadelphia Phillies/Tampa Bay Rays	8.1	14	13.1	9.3
1	2012	San Francisco Giants/Detroit Tigers	7.6	12	12.7	8.7

Source: Nielsen. More info: nielsen.com. 1980: Persons 2+ and households is three-game average.

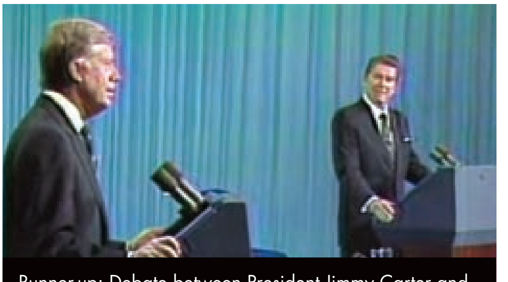
MOST-WATCHED PRESIDENTIAL DEBATES

Based on number of viewers for debates since 1976. The first debate between Donald Trump and Hillary Clinton (Sept. 26) had the biggest-ever U.S. audience for a presidential debate.

Rank	Year		Candidates	Number of viewers (persons 2+ in millions)	Number of households (millions)	Rating %
1	2016	First debate	Donald Trump/Hillary Clinton	84.0	56.4	47.6
2	1980	Only debate	Ronald Reagan/Jimmy Carter	80.6	45.8	58.9
3	2016	Third debate	Donald Trump/Hillary Clinton	71.6	49.5	41.7
4	1992	Second debate	Bill Clinton/George H. W. Bush/Ross Perot	69.9	43.1	46.3
5	1976	First debate	Jimmy Carter/Gerald Ford	69.7	38.0	53.5
6	1988	Second debate	George H. W. Bush/Michael Dukakis	67.3	32.5	35.9
7	1984	Second debate	Ronald Reagan/Walter Mondale	67.3	39.1	46.0
8	2012	First debate	Barack Obama/Mitt Romney	67.2	46.2	40.4
9	1992	Third debate	Bill Clinton/George H. W. Bush/Ross Perot	66.9	42.1	45.2
10	2016	Second debate	Donald Trump/Hillary Clinton	66.5	44.0	37.1
11	2012	Second debate	Barack Obama/Mitt Romney	65.6	45.6	40.0
12	1988	First debate	George H. W. Bush/Michael Dukakis	65.1	33.3	36.8
13	1984	First debate	Ronald Reagan/Walter Mondale	65.1	38.5	45.3
14	1976	Second debate	Jimmy Carter/Gerald Ford	63.9	37.3	52.4
15	2008	Second debate	Barack Obama/John McCain	63.2	44.4	38.8
16	1976	Third debate	Jimmy Carter/Gerald Ford	62.7	34.0	47.8
17	2004	First debate	George W. Bush/John Kerry	62.5	43.0	39.4
18	1992	First debate	Bill Clinton/George H. W. Bush/Ross Perot	62.4	35.7	38.3
19	2012	Third debate	Barack Obama/Mitt Romney	59.2	41.2	35.9
20	2008	Third debate	Barack Obama/John McCain	56.5	40.0	35.0
21	2008	First debate	Barack Obama/John McCain	52.4	36.2	31.6
22	2004	Third debate	George W. Bush/John Kerry	51.2	36.3	32.6
23	2004	Second debate	George W. Bush/John Kerry	46.7	32.5	29.6
24	2000	First debate	George W. Bush/Al Gore	46.6	32.4	31.7
25	2000	Third debate	George W. Bush/Al Gore	37.7	26.3	25.9
26	2000	Second debate	George W. Bush/Al Gore	37.6	27.5	26.8
27	1996	Second debate	Bill Clinton/Bob Dole	36.3	25.3	26.1
28	1996	First debate	Bill Clinton/Bob Dole	36.1	30.6	31.6



Most-watched: Donald Trump and Hillary Clinton in 2016's first presidential debate (Sept. 26, 2016).



Runner-up: Debate between President Jimmy Carter and Ronald Reagan (Oct. 28, 1980).

TRUMP/CLINTON PRESIDENTIAL DEBATE: NBC NEWS VIA YOUTUBE; REAGAN/CARTER PRESIDENTIAL DEBATE: REAGAN FOUNDATION VIA YOUTUBE

Source: Nielsen. More info: nielsen.com.

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

By October 2016 unique visitors in millions.

Rank	Property	Total unique visitors in millions
1	**Google sites**	246.4
2	**Facebook**	207.0
3	**Yahoo sites**	206.6
4	**Microsoft sites**	193.8
5	**Amazon sites**	182.2
6	**CBS Interactive**	165.7
7	**Comcast/NBC Universal**	163.5
8	**AOL**	158.8
9	**Apple**	150.1
10	**Turner Digital**	139.2
Total internet: Total audience		**257.5**

Source: ComScore, October 2016. More info: comscore.com. Verizon Communications in June 2015 bought AOL and in July 2016 signed deal to buy Yahoo's operating businesses. AT&T in October 2016 signed deal to buy Time Warner, parent of Turner Digital.

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

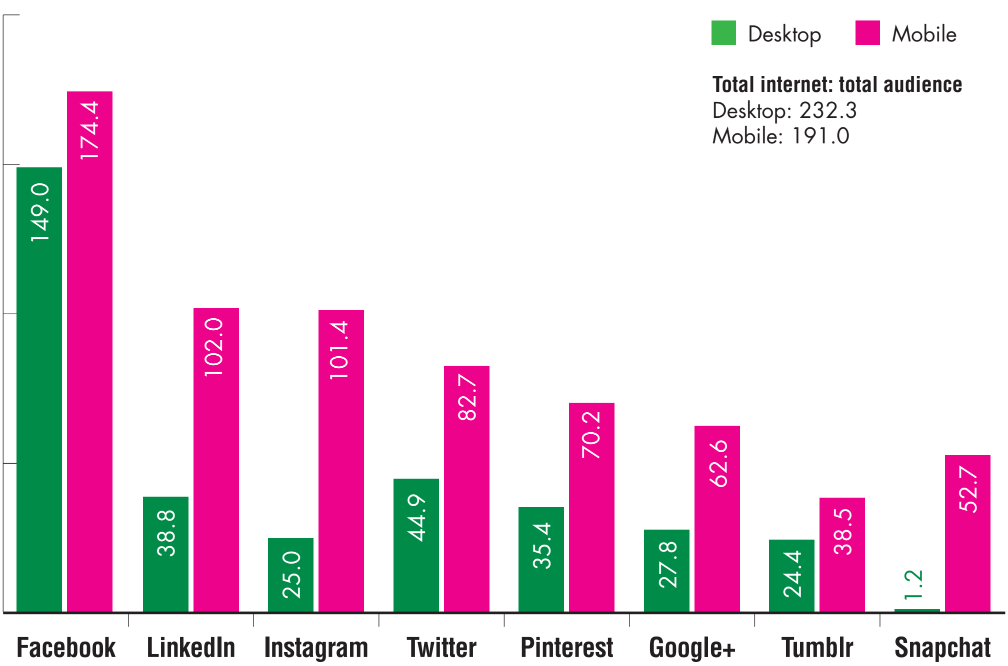
By October 2016 unique viewers in millions.

Rank	Property	Total unique viewers in millions
1	**Google sites**	200.5
2	**Facebook**	73.1
3	**Yahoo sites**	65.1
4	**Comcast/NBC Universal**	51.5
5	**CBS Interactive**	49.9
6	**Microsoft sites**	46.1
7	**Vimeo**	42.8
8	**BroadbandTV**	41.4
9	**Vevo**	41.2
10	**Warner Music**	39.5
Total internet: Total audience		**231.9**

Source: ComScore, October 2016. More info: comscore.com. Verizon Communications in July 2016 signed deal to buy Yahoo's operating businesses.

U.S SOCIAL NETWORKS BY UNIQUE VISITORS

Total unique visitors/viewers (millions).



Source: ComScore (June 2016). More info: comscore.com. Numbers rounded. Unique visitors includes all desktop users age 2 and up and all mobile users age 18 and up. Totals include app visits but exclude other owned properties. Unique visitors include users who visited the networks at least once in June 2016. While unique visits to LinkedIn are higher than others, user engagement is not. For context, LinkedIn has about one-third the average time spent per visitor as Twitter. Facebook owns Instagram. Microsoft Corp. in June 2016 signed deal to buy LinkedIn Corp. Verizon Communications in July 2016 signed deal to buy Yahoo operations including Tumblr.

WHAT DO MARKETERS NEED TO FOCUS ON IN 2017?

"The playbook—I tell my team that while the banking and payments industry we are in is being disrupted, marketing is being disrupted much faster. The reality is that most marketers are following a playbook that worked 2-3 years ago and won't much longer. Consumer media consumption has moved to personal screens, but ad units and measurements haven't kept up. People are still expecting interruptive forms of advertising, which were created when there were only three TV channels and no remote, to work. Do we seriously think pop ups and pre-roll are going to build more consumer love for our brands? So in 2017, focus on reinventing your tactics, don't rely on false positives from old measures, and remember the riskiest thing you can do is sticking with the playbook you have."

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AGENCIES

WORLD'S 10 LARGEST AGENCY COMPANIES

By worldwide revenue in 2015.

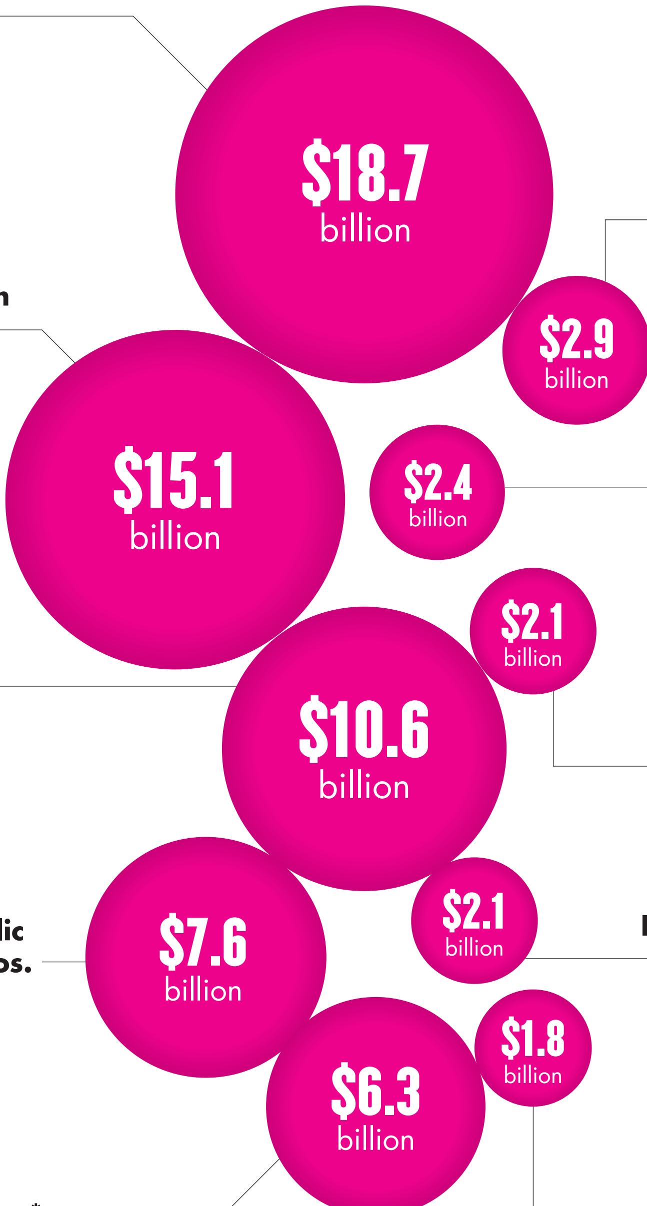
1. WPP
London
2015 vs. 2014:
-1.4%

2. Omnicom Group
New York
2015 vs. 2014:
-1.2%

3. Publicis Groupe
Paris
2015 vs. 2014:
10.6%

4. Interpublic Group of Cos.
New York
2015 vs. 2014:
1.0%

5. Dentsu Inc.*
Tokyo
2015 vs. 2014:
-1.6%



6. Accenture's Accenture Interactive
New York/London
2015 vs. 2014:
57.8%

7. Havas*
Puteaux, France
2015 vs. 2014:
-2.0%

8. Alliance Data Systems Corp.'s Epsilon
Irving, Texas
2015 vs. 2014:
3.3%

9. IBM Corp.'s IBM Interactive Experience*
Armonk, N.Y.
2015 vs. 2014:
33.6%

10. Hakuhodo DY Holdings*
Tokyo
2015 vs. 2014:
-4.7%

From Agency Report 2016 (May 2, 2016, print edition). See expanded data at **AdAge.com/agencyfamilytrees2016**.
Numbers rounded. Asterisk indicates Ad Age Datacenter estimate.

WORLD'S LARGEST AGENCY NETWORKS

By 2015 estimated worldwide revenue. Dollars in millions.

Rank	Network, company	Selected units	2015 worldwide revenue
1	**Young & Rubicam Group**, WPP	Y&R, Wunderman, Burson-Marsteller, VML, Cohn & Wolfe, Sudler & Hennessey, Landor, Blast Radius, Taxi, Bravo Group, Iconmobile	$3,668
2	**DDB Worldwide Communications Group**, Omnicom Group	DDB Worldwide, Rapp, Grupo ABC, Interbrand, Tribal Worldwide, DDB Health/DDB Remedy, TracyLocke, Alma	3,100
3	**McCann Worldgroup**, Interpublic Group of Cos.	McCann, Weber Shandwick, MRM//McCann, McCann Health, Momentum Worldwide, Martin Agency, FutureBrand, PMK-BNC	3,083
4	**Accenture Interactive**, Accenture	Accenture's digital network	2,923
5	**BBDO Worldwide**, Omnicom Group	BBDO Worldwide, Proximity, Organic, Wednesday	2,483
6	**Ogilvy & Mather**, WPP	Ogilvy & Mather Advertising, OgilvyOne Worldwide, Ogilvy Public Relations, Ogilvy CommonHealth Worldwide, Neo@Ogilvy	2,337
7	**Epsilon**, Alliance Data Systems Corp.	Epsilon, Catapult	2,141
8	**IBM Interactive Experience**, IBM Corp.	IBM Corp.'s digital network	2,125
9	**Dentsu (Japan)**, Dentsu Inc.	Dentsu Inc.'s network of agencies in Japan	1,988
10	**TBWA Worldwide**, Omnicom Group	TBWA Worldwide, Integer Group, EG+ Worldwide, TBWA/WorldHealth, Zimmerman Advertising	1,960
11	**Deloitte Digital**, Deloitte	Deloitte's digital network	1,648
12	**Publicis Worldwide**, Publicis Groupe	Publicis Worldwide	1,621
13	**Havas Creative Group**, Havas	Havas Worldwide, Havas Health, Havas PR, Arnold Worldwide	1,542
14	**FCB**, Interpublic Group of Cos.	FCB, R/GA, FCB Health, HackerAgency, New Honor Society, Rivet	1,334
15	**J. Walter Thompson Co.**, WPP	J. Walter Thompson Co., Mirum	1,274
16	**Dentsu Aegis Network**, Dentsu Inc.	Isobar, iProspect, McGarryBowen, 360i, MKTG, Firstborn, Icuc Social, Mitchell Communications Group, Fetch, Cardinal Path	1,265
17	**Leo Burnett Worldwide**, Publicis Groupe	Leo Burnett Worldwide/Arc, Lapiz, Rokkan	1,261
18	**Hakuhodo**, Hakuhodo DY Holdings	Hakuhodo, Digital Kitchen, Sid Lee, Red Peak, SYPartners	1,188
19	**PwC Digital Services**, PwC	PwC's digital network	1,121
20	**BlueFocus (China)**, BlueFocus Communications Group	BlueDigital	1,052
21	**SapientNitro**, Publicis Groupe	SapientNitro, The Community	917
22	**DigitasLBi**, Publicis Groupe	DigitasLBi	897
23	**Grey Group**, WPP	Grey, GHG/GreyHealth Group, Wing	894
24	**Experian Marketing Services**, Experian	Experian's marketing services business segment	870
25	**Saatchi & Saatchi**, Publicis Groupe	Saatchi & Saatchi, Team One, Saatchi & Saatchi X, Conill	854
	Total (dollars in billions)		**$43.5B**

From Agency Report 2016 (May 2, 2016, print edition). See expanded network holdings: **AdAge.com/agencyfamilytrees2016.**
Expanded footnotes: **AdAge.com/agencyreport2016**.

Source: Ad Age Datacenter estimates. Numbers rounded. Ranking and listing based on network configuration as of Agency Report 2016. Not all network units shown. Media agencies not included in network revenue for this ranking.

BIGGEST WORLDWIDE AGENCY VENTURES BY CATEGORY

By 2015 estimated worldwide revenue.

Category/largest venture, parent	Worldwide 2015 revenue in category	% chg	Worldwide 2015 revenue total for category	% chg
Agency company **WPP**	$18.7 billion	-1.4	50 largest agency companies **$88.6 billion**	3.8
Consolidated agency network **Young & Rubicam Group**, WPP	$3.7 billion	0.0	25 largest agency networks **$43.5 billion**	1.6
Digital agency network **Accenture Interactive**, Accenture	$2.9 billion	57.8	15 largest digital agency networks **$17.0 billion**	NA
Advertising agency **Dentsu**, Dentsu	$2.0 billion	-8.8	10 largest media agency networks **$13.3 billion**	-4.0
Media agency network **Starcom Mediavest Group**, Publicis	$1.5 billion	-4.9	10 largest media agency networks **$10.1 billion**	1.0
CRM/direct marketing agency network **Epsilon**, Alliance Data Systems	$1.4 billion	8.6	10 largest CRM/direct marketing agency networks **$8.0 billion**	0.1
Public relations agency network **Edelman**, DJE Holdings	$847 million	5.2	10 largest public relations agency networks **$4.7 billion**	2.4

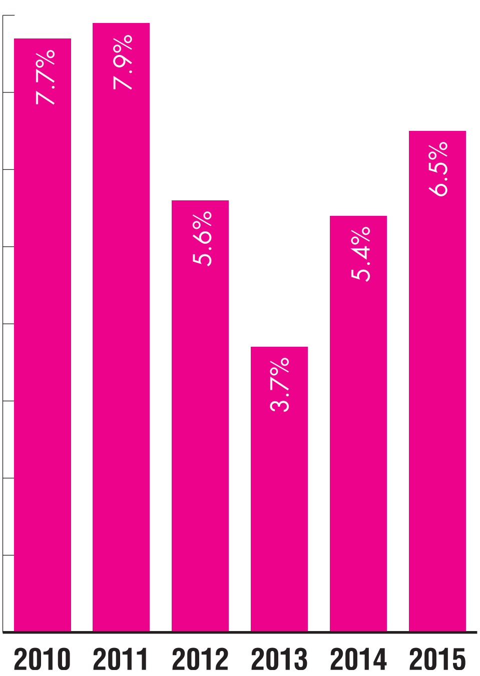
From Agency Report 2016 (May 2, 2016, print edition). Some agencies and networks have changed names or structure since report was published. Expanded rankings: **AdAge.com/agencyreport2016**. Source: Ad Age Datacenter estimates.

U.S. AGENCY GROWTH AND DIGITAL SHARE: 2010-2015

From Agency Reports.

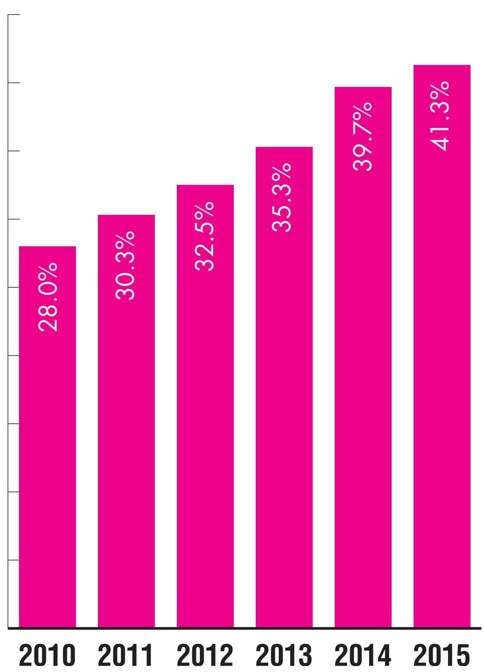
U.S. AGENCY REVENUE GROWTH: 2010-2015

U.S. revenue for agencies from all disciplines grew 6.5% in 2015.



DIGITAL SHARE OF U.S. AGENCY REVENUE: 2010-2015

Digital's share of revenue for U.S. agencies from all disciplines topped 41% in 2015.



Agency Reports' growth rates based on U.S. agencies from all disciplines.
Source: Ad Age Agency Reports. See more: **AdAge.com/agencyreport2016**.

BIGGEST U.S. AGENCY VENTURES BY CATEGORY

By 2015 estimated U.S. revenue.

Category/largest venture, parent	U.S. 2015 revenue in category	% chg	U.S. 2015 revenue total for category[1]	% chg
Agency company **Omnicom Group**	$8.5 billion	4.2	U.S. revenue of world's 50 largest agency companies **$41.3 billion**	10.6
Consolidated agency network **Epsilon**[2], Alliance Data Systems	$2.1 billion	4.4	U.S. revenue of world's 25 largest agency networks **$19.0 billion**	8.1
Agencies from all disciplines **Epsilon**[4] , Alliance Data Systems	$1.9 billion	3.5	915 agencies from all disciplines[3] **$46.8 billion**	6.5
Advertising agency **BBDO Worldwide**, Omnicom	$603 million	4.5	527 units with ad agency revenue **$12.5 billion**	4.8
Media agency network **Starcom Mediavest Group**, Publicis	$883 million	0.8	15 largest media agency networks **$3.6 billion**	8.7
Digital agency network **Accenture Interactive**, Accenture	$1.2 billion	70.8	20 largest digital agency networks **$10.0 billion**	13.0
Search marketing **iCrossing**, Hearst Corp.	$127 million	13.0	218 units with search marketing revenue **$1.5 billion**	11.5
Mobile marketing **Epsilon**, Alliance Data Systems	$209 million	0.1	216 units with mobile marketing revenue **$1.7 billion**	NA
CRM/direct marketing agency network **Epsilon**[5], Alliance Data Systems	$1.4 billion	8.8	213 units with CRM/direct marketing revenue **$7.4 billion**	3.8
Public relations agency network **Edelman**, DJE Holdings	$523 million	8.5	229 units with public relations revenue **$4.5 billion**	5.0
Healthcare agency network **Publicis Healthcare Communications Group**, Publicis	$703 million	8.7	227 units with healthcare revenue **$4.8 billion**	8.7
Promotion agency network **Advantage Marketing Partners**, Advantage Solutions	$481 million	9.2	243 units with promotion revenue **$4.8 billion**	5.1
Experiential/event marketing agency network **Advantage Marketing Partners**, Advantage Solutions	$481 million	9.2	179 units with experiential/event marketing revenue **$3.0 billion**	5.3
Hispanic-American **Eventus**, Advantage Solutions	$34 million	7.8	90 units with Hispanic-American revenue **$583 million**	1.2
African-American **GlobalHue**	$21 million	-13.5	46 units with African-American revenue **$139 million**	2.5
Asian-American **Gravity Media**, Dentsu	$22 million	-1.6	30 units with Asian-American revenue **$129 million**	5.3

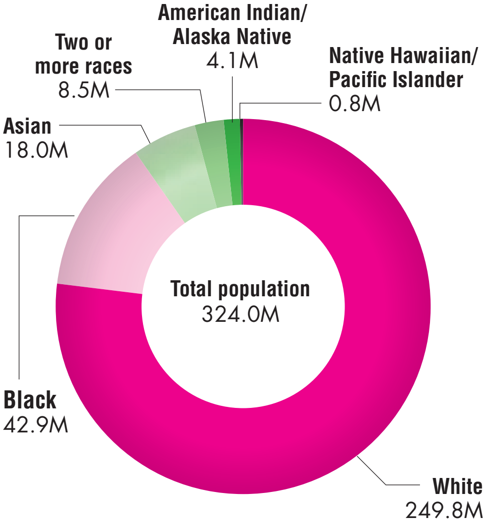
From Agency Report 2016 (May 2, 2016, print edition). Some agencies and networks have changed names or structure since report was published. Expanded rankings: **AdAge.com/agencyreport2016**. Source: Ad Age Datacenter estimates.

1. Unit count in this column shows number of units (agencies) with U.S. revenue in this discipline in Agency Report 2016.
2. Consolidated agency network revenue.
3. All Disciplines ranking of 900-plus agencies from all disciplines in Agency Report 2016.
4. Agency revenue.
5. CRM/direct marketing agency network revenue.

CONSUMERS

2016 U.S. POPULATION BY RACE

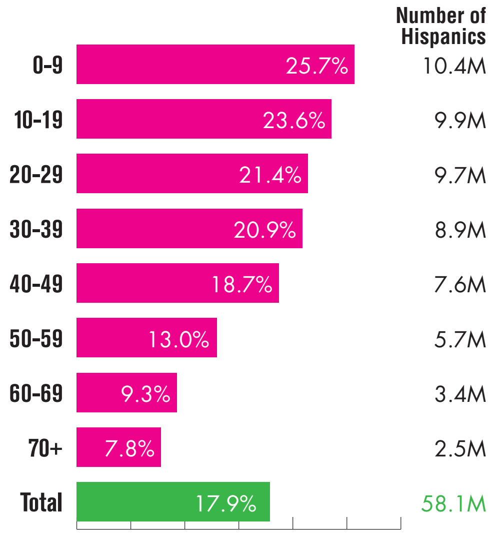
Population in millions.



Source: Census Bureau. Projections for July 2016 from national projections released in December 2014. Numbers rounded. More info: census.gov.

2016 HISPANICS POPULATION BY AGE

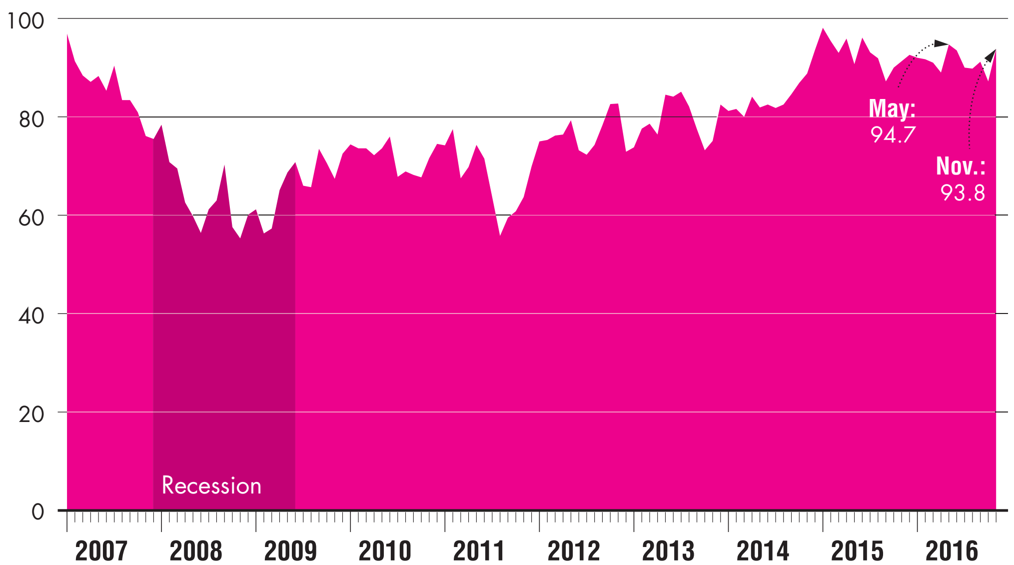
Hispanics account for more than 20% of the U.S. population for every age up to 42.



Source: Census Bureau. Projections for July 2016 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 November 2016 stood at 93.8, slightly below 2016's May high point of 94.7.



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

WHAT DO MARKETERS NEED TO FOCUS ON IN 2017?

"Our focus in 2017 is integration. Across the board we're integrating our products and services, specifically content and connections, for a seamless customer experience. We see tremendous opportunity to drive customer loyalty when customers have multiple services with us, like AT&T wireless and DIRECTV. And in this increasingly competitive market, the customer experience is the new battleground. Using analytics and smart touch points for our customers will help drive a real win-win."

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HOW AMERICANS USE LEISURE TIME

Americans age 15+ on average had 5.2 hours of leisure time per day in 2015. Watching TV remains by far the No. 1 leisure activity.

AVERAGE LEISURE HOURS IN 2015				AVERAGE WEEKDAY LEISURE HOURS SPENT IN 2015 ON...						
Age	All days	Week-days	Week-ends, holidays	Watching TV	Socializing and communicating	Playing games and computer use for leisure	Reading	Participating in sports, exercise and recreation	Relaxing, thinking	Other leisure and sports activities[1]
15-19	5.8	5.4	6.7	2.4	0.6	1.0	0.2	0.6	0.1	0.6
20-24	4.7	4.2	6.0	2.0	0.5	0.7	0.1	0.4	0.2	0.3
25-34	4.3	3.4	6.2	1.8	0.4	0.3	0.2	0.3	0.2	0.3
35-44	4.0	3.4	5.4	1.8	0.5	0.2	0.2	0.3	0.2	0.3
45-54	4.7	4.1	6.1	2.4	0.6	0.2	0.2	0.2	0.3	0.3
55-64	5.6	5.1	6.7	3.0	0.5	0.3	0.4	0.3	0.3	0.4
65-74	6.8	6.6	7.4	3.9	0.5	0.4	0.6	0.3	0.4	0.4
75+	7.8	7.7	8.2	4.3	0.6	0.5	1.0	0.2	0.7	0.3
15+	**5.2**	**4.7**	**6.4**	**2.6**	**0.5**	**0.4**	**0.3**	**0.3**	**0.3**	**0.3**
Women	4.9	4.4	5.9	2.4	0.5	0.3	0.4	0.2	0.3	0.3
Men	5.6	5.0	7.0	2.7	0.5	0.5	0.3	0.4	0.3	0.4

1. Including travel related to leisure and sports activities. Source: Bureau of Labor Statistics' 2015 American Time Use Survey. More info: bls.gov/tus.

HOUSEHOLDS RICH TO POOR:

INCOME DISTRIBUTION

Share of U.S. aggregate income by household-income quintiles. The poorest quintile accounted for just 3.1% of income in 2015; the top fifth captured 51.1%.

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
2015	3.1	8.2	14.3	23.2	51.1

MEAN INCOME

Mean (average) income for household-income quintiles in 2015; percent change vs. prerecession 2007. Rich households have rebounded from the last recession faster than poor households.

	2015 mean income	% change vs. prerecession 2007
Lowest 20%	$12,457	-5.7%
Second	32,631	-3.0%
Third	56,832	-0.5%
Fourth	92,031	1.8%
Top 20%	202,366	5.4%
All households	**$79,263**	**2.6%**

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

MEDIAN HOUSEHOLD INCOME

U.S. median household income in inflation-adjusted 2015 dollars since prerecession 2007. Real median household income in 2015 scored the biggest gain (up 5.2%) since the Census Bureau started this survey in 1967.

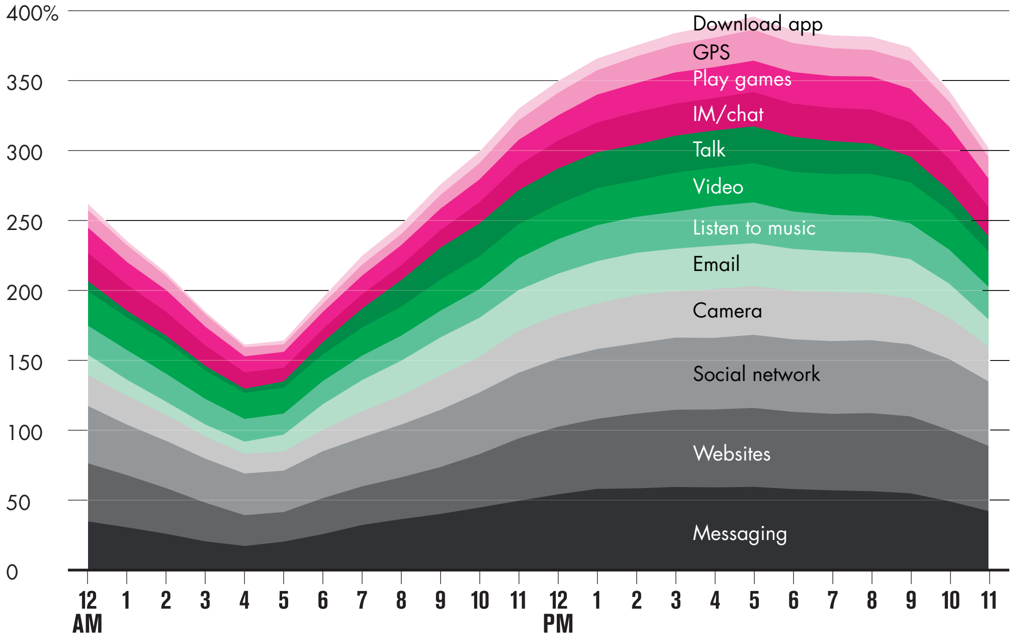
Year	Median income	Percent change
2007	$57,423	1.3%
2008	55,376	-3.6%
2009	54,988	-0.7%
2010	53,568	-2.6%
2011	52,751	-1.5%
2012	52,666	-0.2%
2013	54,525	3.5%
2014	53,719	-1.5%
2015	**56,516**	**5.2%**

■ RECESSION YEARS

Source: Census Bureau's Current Population Survey (Annual Social and Economic Supplements). The last recession began in December 2007 and ended in June 2009. More info: census.gov.

WHEN AND HOW SMARTPHONE OWNERS USE THEIR DEVICE

Messaging (SMS or MMS) is the most popular activity on smartphones. Peak hour for messaging is 5 p.m., when 60.2% of adult smartphone owners send or receive messages.



Source: Simmons Research. Adult smartphone users, spring 2016. 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, 52.2% of smartphone owners use their phone for social networking between 8 p.m. and 9 p.m. at least once in a week.

HOW TV VIEWERS ARE MULTITASKING

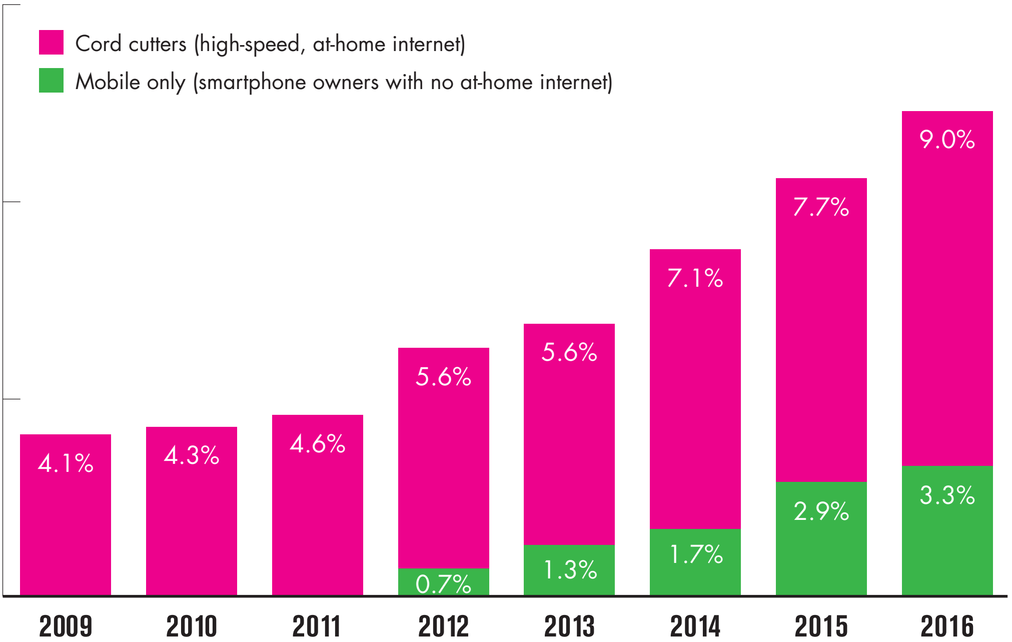
Percent of adults who do these activities while watching TV.

	Very often	Often	Somewhat often	Not very often	Not at all
Visit websites on mobile phone	23.1%	17.1%	14.9%	10.8%	34.0%
Text on mobile phone	22.9	18.6	17.5	15.2	25.8
Visit websites on computer	21.3	17.2	16.6	10.0	34.8
Email on computer	17.7	15.5	13.2	12.2	41.3
Talk on mobile phone	16.5	14.4	17.5	22.9	28.8
Instant message on computer	8.4	5.5	6.0	8.8	71.2
Listen to radio	7.6	5.4	6.2	8.0	72.8
Play video games	6.3	4.5	5.9	5.3	77.9
Read magazine or comic	6.3	8.2	10.1	15.5	59.9
Watch videos on computer	6.3	5.4	6.2	9.7	72.5

Source: Simmons Research. More info: simmonsresearch.com. Results based on adult survey participants who answered question (and so results exclude nonresponses), spring 2016.

CORD CUTTERS AND MOBILE-ONLY HOUSEHOLDS

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



Source: Simmons Research. More info: simmonsresearch.com. U.S. households, spring 2016. Numbers rounded. 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).

DEMOGRAPHICS OF CORD-CUTTER HOUSEHOLDS

More than one-fifth (21.9%) of millennial households don't subscribe to cable or satellite TV[1]. Millennial households account for 24.9% of households overall but make up 44.0% of households not subscribing to cable or satellite TV.

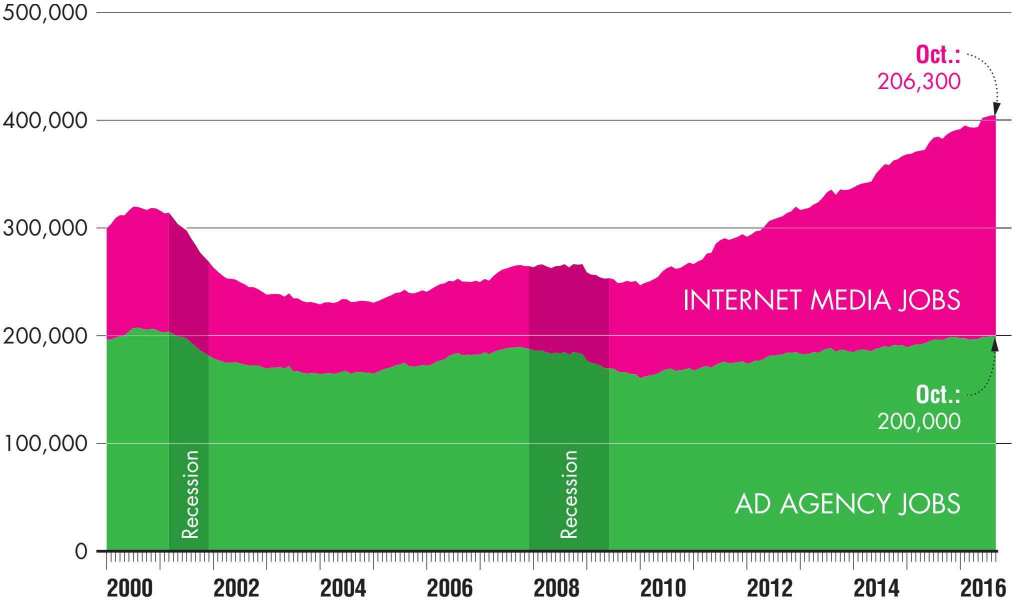
Group	Percentage of households in this group that are cord cutters or mobile only	Total households	Traditional cord-cutter households[2]	Mobile-only households[3]	Cord cutters or mobile-only households
Millennials	21.9%	24.9%	43.3%	45.9%	44.0%
Generation X	17.7	22.5	35.8	22.6	32.3
Boomers	6.8	37.2	19.6	23.3	20.6
Silent generation	2.5	15.4	1.3	8.3	3.2
Non-millennials	9.2	75.1	56.7	54.1	56.0
Hispanic	16.1	14.2	15.8	25.8	18.5
Parents	17.9	25.9	38.7	34.7	37.6
Male	13.0	41.4	44.1	42.1	43.5
Female	11.9	58.6	55.9	57.9	56.5
All households	**12.4%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Simmons Research. More info: simmonsresearch.com. Spring 2016. Numbers rounded. 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).

JOBS

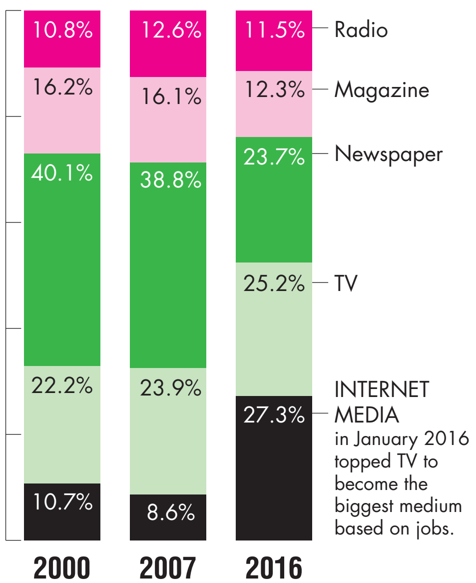
U.S. AD AGENCY AND INTERNET MEDIA EMPLOYMENT

Ad agency staffing in 2016 reached 200,000 for the first time since 2001. Internet media[1] staffing (206,300 in October 2016) is at a record high and has more than doubled since 2011.



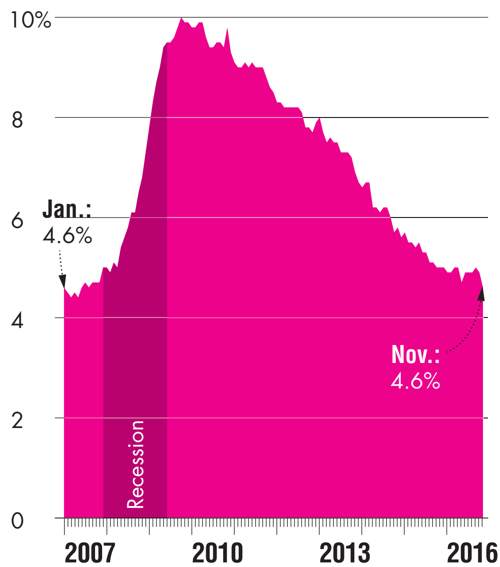
U.S. MEDIA EMPLOYMENT

Share of media[2] jobs in 2000 (dot-com bubble), 2007 (eve of recession) and 2016.



U.S. UNEMPLOYMENT RATE

The nation's jobless rate (4.6% in November 2016) is at its lowest level since 2007. It's at half the recession-era peak (10.0% in October 2009).



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; October 2016.

WHAT DO MARKETERS NEED TO FOCUS ON IN 2017?

"'Talent'—the war for top creative talent has never been greater as brand owners scour ad agencies, media companies and the creative industries generally for outstanding talent. Consider also the need for diverse creative talent too and the war is intense. It is my job to really understand the industry not just in terms of general trends but also I need to understand exactly who is doing what, who is doing it well and who is doing it where. If you are a creative and you are doing great things then my team and I will be coming after you. Mark my words."

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CONNECTION TRANSFORMS
EVERY INDUSTRY, BUSINESS AND CUSTOMER EXPERIENCE.
MORE CONNECTIONS CREATES MORE DATA.
MORE DATA CREATES MORE COMPLEXITY AND MORE RISK.
IN THE CONNECTED WORLD,
WE NEED MORE THAN DATA SCIENCE. WE NEED
CONNECTION SCIENCE.
NOW MORE THAN EVER, YOU NEED TO KNOW HOW TO CONNECT
PEOPLE, PLACES AND THINGS.
AND THE KEY TO CONNECTION IS
AUTHORITATIVE IDENTITY.

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