

AdvertisingAge

1.5M

U.S. ad industry
employment, up
69,500 jobs from
downturn nadir

2014 Edition

MARKETING FACT PACK

ANNUAL GUIDE TO MARKETERS, MEDIA AND AGENCIES

\$505 B

2013 worldwide
ad spending on
major media

65%

Percentage of adults
who text on mobile
phone while
watching TV

4.4%

Average 2014 growth
forecast for U.S.
ad spending

Internet's
projected share of U.S.
ad spending in 2014

24.6%

\$22.7 B

2012 worldwide revenue
of soon-to-merge
Publicis and
Omnicom

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U.S. ad industry employment
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ABOUT MARKETING FACT PACK 2014

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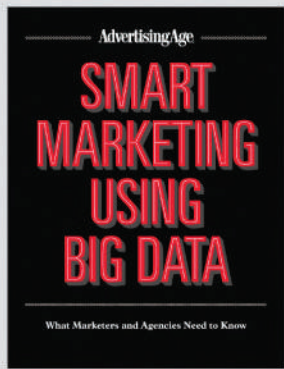
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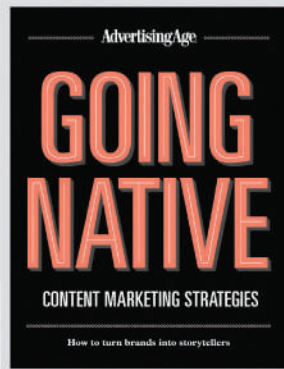
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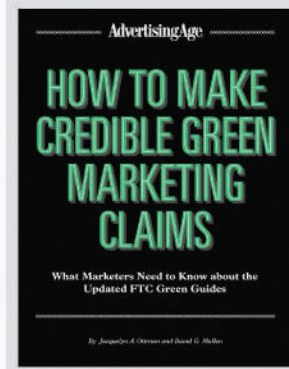
IN THIS REPORT, YOU WILL LEARN:

- How to integrate Big Data in your marketing analytics
- 10 tips from leaders that have embraced Big Data marketing
- The talent you should hire, and how to attract the best Big Data candidates



IN THIS REPORT, YOU WILL LEARN:

- Why having a content marketing strategy is crucial to your brand's future
- How native ads, content marketing, content strategy, and branded integration are leading marketers to adopt a new theory of communicating with consumers
- Six concrete case studies that show you who did it right, and who did it wrong



IN THIS REPORT, YOU WILL LEARN:

- What marketers need to know about the updated FTC Green Guides
- Why it's important to make credible environmental claims, and the risks of damaging your reputation with greenwashing
- Case studies of marketers that evolved from greenwashing to making more credible claims

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AdvertisingAge
WHAT'S NEWS TO WHAT'S NEXT

THE NUMBERS YOU NEED. STAT.

Ad Age's annual guide to marketers, media and agencies

Welcome to Ad Age's 2014 Marketing Fact Pack, our guide to marketers, media and agencies.

We'll show you the biggest players, who's rising and who's falling, drawing on the Ad Age DataCenter's rankings and analysis from the past year. Want to dig deeper? Subscribe to AdAge.com/datacenter to get the numbers that count.

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Explore Ad Age's marketers database (profiles, agency rosters, executives, brands, spending), updated in December 2013. AdAge.com/marketertrees2013update

Review agency rankings. AdAge.com/agencyreport2013

Get facts on the global market. AdAge.com/globalmarketers2013

Subscription info: AdAge.com/subscribe

THE BIG LIST

1. LARGEST ADVERTISER: PROCTER & GAMBLE CO.

\$4.8 billion in 2012 total U.S. ad spending (measured media plus unmeasured spending); \$10.6 billion in 2012 worldwide measured-media spending.

2. FASTEST-GROWING MAJOR ADVERTISER: SAMSUNG

55% growth in 2012 worldwide measured-media spending, highest growth on Ad Age's Global 100; 58% growth in 2012 total U.S. ad spending, highest growth on Ad Age's 100 Leading National Advertisers.

3. BIGGEST AGENCY COMPANY: PUBLICIS OMNICOM GROUP

Assuming Publicis and Omnicom complete their merger. Combined 2012 global revenue: \$22.7 billion.

4. WORLD'S BIGGEST AGENCY NETWORK: DENTSU (JAPAN)

2012 estimated global revenue for Dentsu Inc.'s agency network in Japan: \$3.6 billion.

5. NATION'S LARGEST AGENCY NETWORK: MCCANN WORLDGROUP

2012 estimated revenue from U.S. for Interpublic-owned network: \$1.6 billion.

6. LARGEST AD MARKET: U.S.

33% of 2013 worldwide ad spending (but just 4.4% of world population).

7. MOST-ADVERTISED U.S. BRAND: AT&T

\$1.6 billion in 2012 U.S. measured-media spending.

8. BIGGEST AD MEDIUM: TV

39% of 2013 U.S. major-media ad spending, ahead of internet.

9. FASTEST-GROWING AD MEDIUM: INTERNET

18.2% growth in 2013 U.S. ad spending. Internet's 2013 share of ad spending: 21.7%.

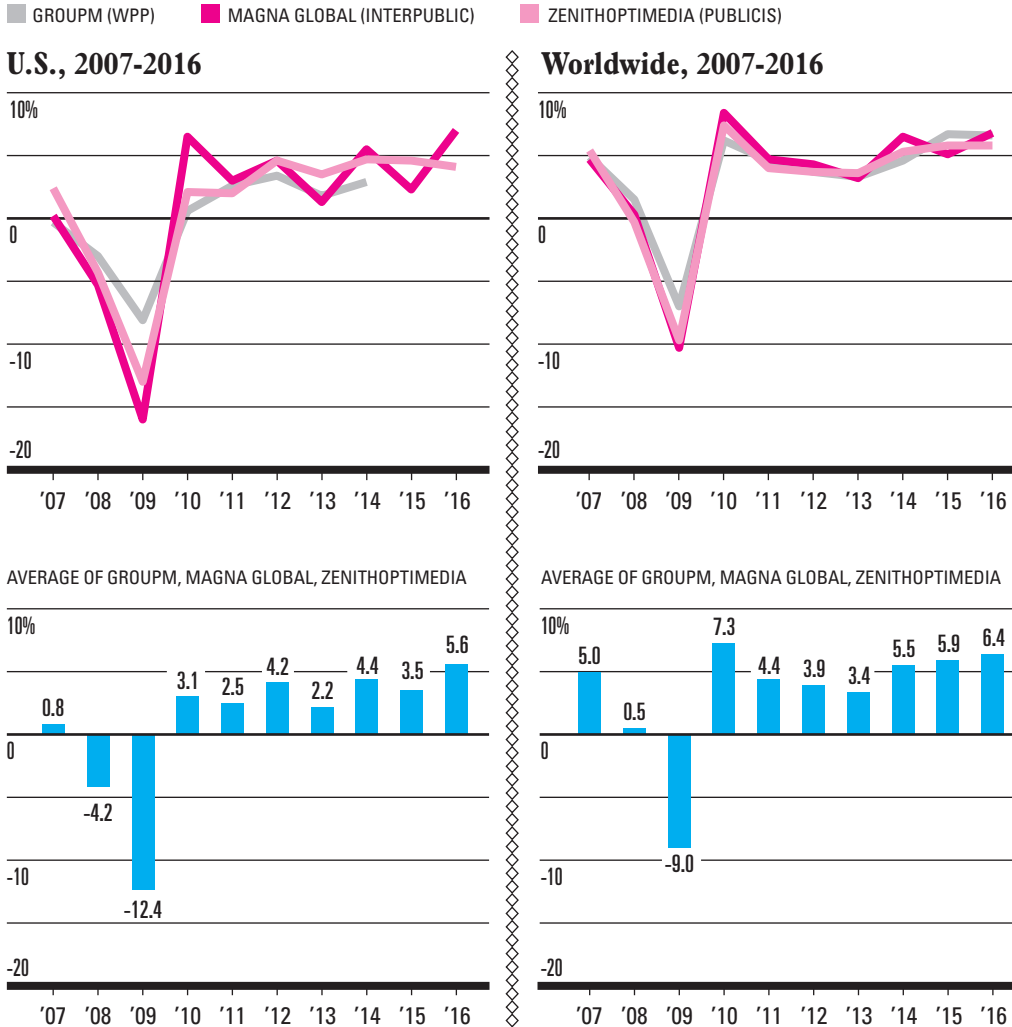
10. BIGGEST MOBILE AD SELLER: GOOGLE

\$4 billion in estimated 2013 U.S. mobile ad revenue.

MARKETERS

U.S. and worldwide media advertising growth rates

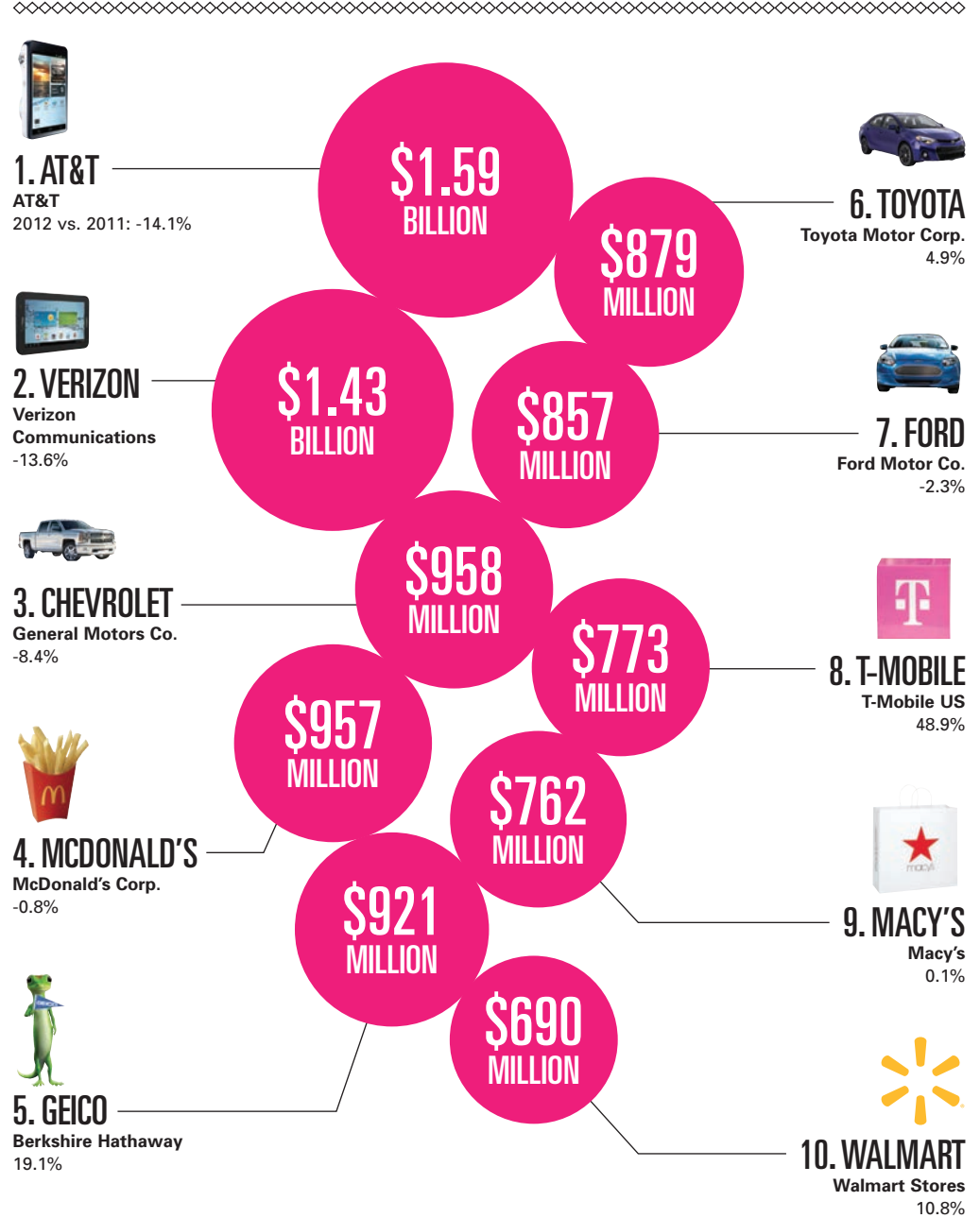
Percent change in advertising dollars. The average of GroupM, Magna Global and ZenithOptimedia forecasts suggests U.S. ad growth of 4.4% in 2014, double 2013's 2.2% growth; and worldwide ad growth of 5.5% in 2014 vs. 3.4% in 2013.



Source: December 2013 advertising forecasts of WPP's GroupM (groupm.com), Interpublic Group of Cos.' Magna Global (magnaglobal.com) and Publicis Groupe's ZenithOptimedia (zenithoptimedia.com). U.S. averages for 2015 and 2016 based on average of Magna Global and ZenithOptimedia. Figures include TV, internet, newspaper, magazine, radio and out of home. ZenithOptimedia figures include cinema. GroupM includes cinema in 35 markets (but not U.S.). GroupM 2015 and 2016 worldwide growth based on a separate GroupM long-term forecast model.

10 biggest megabrands

Most-advertised brands by 2012 U.S. measured-media ad spending.



From 100 Leading National Advertisers 2013, Part 2 (July 8, 2013). See ranking of nation's 200 most-advertised brands: AdAge.com/Ina2013.

Source: Ad Age DataCenter analysis of U.S. measured-media spending data from WPP's Kantar Media. Company's measured spending for all products and services related to brand. More info: kantarmediana.com.

25 largest U.S. advertisers

By 2012 total U.S. ad spending (measured media plus unmeasured spending). Dollars in millions.

RANK	COMPANY	TOTAL U.S. AD SPENDING (MEASURED MEDIA PLUS UNMEASURED)			U.S. MEASURED-MEDIA AD SPENDING		
		2012	2011	% CHG	2012	2011	% CHG
1	Procter & Gamble Co. Cincinnati	\$4,830	\$4,903	-1.5	\$3,143	\$3,147	-0.1
2	General Motors Co. Detroit	3,067	2,816	8.9	1,655	1,787	-7.4
3	Comcast Corp. Philadelphia	2,989	2,763	8.2	1,772	1,594	11.2
4	AT&T Dallas	2,910	3,135	-7.2	1,591	1,846	-13.8
5	Verizon Communications New York	2,381	2,523	-5.6	1,439	1,669	-13.8
6	Ford Motor Co. Dearborn, Mich.	2,277	2,141	6.3	1,065	1,069	-0.4
7	L'Oréal Clichy, France	2,240	2,125	5.4	1,507	1,386	8.8
8	JPMorgan Chase & Co. New York	2,087	2,352	-11.3	447	660	-32.3
9	American Express Co. New York	2,071	2,125	-2.6	349	406	-14.0
10	Toyota Motor Corp. Toyota City, Japan	2,008	1,749	14.8	1,245	1,102	13.0
11	Fiat (Chrysler Group) Turin, Italy/Auburn Hills, Mich.	1,947	1,768	10.1	1,148	1,351	-15.0
12	Walt Disney Co. Burbank, Calif.	1,879	2,112	-11.1	973	1,031	-5.7
13	Walmart Stores Bentonville, Ark.	1,820	1,820	0.0	762	674	13.1
14	Time Warner New York	1,715	2,051	-16.4	1,076	1,289	-16.5
15	Target Corp. Minneapolis	1,653	1,589	4.0	672	701	-4.1
16	Johnson & Johnson New Brunswick, N.J.	1,650	1,940	-14.9	887	1,043	-14.9
17	Pfizer New York	1,637	2,072	-21.0	1,101	1,357	-18.9
18	Bank of America Corp. Charlotte, N.C.	1,615	1,705	-5.3	422	413	2.2
19	Macy's Cincinnati	1,603	1,507	6.4	842	840	0.3
20	Berkshire Hathaway Omaha, Neb.	1,576	1,394	13.1	1,167	1,032	13.1
21	Anheuser-Busch InBev Leuven, Belgium/St. Louis	1,514	1,423	6.4	584	519	12.5
22	Sears Holdings Corp. Hoffman Estates, Ill.	1,427	1,688	-15.5	642	666	-3.6
23	McDonald's Corp. Oak Brook, Ill.	1,424	1,367	4.2	957	965	-0.8
24	Sprint Corp. ¹ Overland Park, Kan.	1,400	1,400	0.0	810	886	-8.6
25	Unilever Rotterdam, The Netherlands/London	1,328	1,253	5.9	858	678	26.5
Total for the 25		\$51,047	\$51,720	-1.3	\$27,116	\$28,111	-3.5

From 100 Leading National Advertisers 2013 (June 24, 2013). See expanded data and report methodology at AdAge.com/lna2013. See 100 Leading National Advertisers database including profiles, agency rosters and executives, updated in December 2013: AdAge.com/marketertrees2013update.

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.com. Unmeasured spending figures are Ad Age DataCenter estimates including direct marketing, promotion, internet paid search, internet video, social media and other forms of spending not included in measured media. 1. Japan's SoftBank Corp. in July 2013 bought a 78% stake in Sprint Nextel Corp. Coinciding with the closing, Sprint Nextel Corp. changed its name to Sprint Corp.

25 largest global advertisers

By 2012 worldwide measured-media ad spending. Dollars in millions.

RANK	COMPANY	WORLDWIDE MEASURED-MEDIA SPENDING			U.S. MEASURED-MEDIA AD SPENDING		
		2012	2011	% CHG	2012	2011	% CHG
1	Procter & Gamble Co. Cincinnati	\$10,615	\$11,252	-5.7	\$3,143	\$3,147	-0.1
2	Unilever Rotterdam, The Netherlands/London	7,413	7,317	1.3	858	678	26.5
3	L'Oréal Clichy, France	5,643	5,593	0.9	1,507	1,386	8.8
4	Toyota Motor Corp. Toyota City, Japan	3,310	2,881	14.9	1,245	1,102	13.0
5	General Motors Co. Detroit	3,206	3,346	-4.2	1,655	1,787	-7.4
6	Coca-Cola Co. Atlanta	3,029	2,913	4.0	385	391	-1.7
7	Nestlé Vevey, Switzerland	2,987	2,937	1.7	840	837	0.4
8	Volkswagen Wolfsburg, Germany	2,971	2,857	4.0	546	533	2.3
9	McDonald's Corp. Oak Brook, Ill.	2,693	2,656	1.4	957	965	-0.8
10	PepsiCo Purchase, N.Y.	2,470	1,837	34.5	844	658	28.3
11	Reckitt Benckiser Group Slough, Berkshire, U.K.	2,417	2,615	-7.6	474	470	0.7
12	Mars Inc. McLean, Va.	2,181	2,075	5.1	591	572	3.3
13	Fiat (Chrysler Group) Turin, Italy/Auburn Hills, Mich.	2,089	2,455	-14.9	1,148	1,351	-15.0
14	Samsung Electronics Co. Seoul	2,053	1,324	55.1	597	266	124.8
15	Comcast Corp. Philadelphia	2,003	1,832	9.3	1,772	1,594	11.2
16	Ford Motor Co. Dearborn, Mich.	1,975	2,121	-6.9	1,065	1,069	-0.4
17	Honda Motor Co. Tokyo	1,927	1,649	16.8	851	709	20.0
18	Mondelez International Deerfield, Ill.	1,896	1,877	1.0	212	263	-19.4
19	Johnson & Johnson New Brunswick, N.J.	1,877	2,192	-14.4	887	1,043	-14.9
20	Nissan Motor Co. Yokohama, Japan	1,820	1,771	2.8	771	633	21.9
21	Deutsche Telekom (T-Mobile) Bonn, Germany	1,720	1,548	11.1	887	636	39.5
22	Sony Corp. Tokyo	1,692	1,857	-8.9	724	816	-11.2
23	Yum Brands Louisville, Ky.	1,657	1,507	10.0	786	673	16.7
24	Pfizer New York	1,572	1,747	-10.0	1,101	1,357	-18.9
25	PSA Peugeot Citroën Paris	1,498	1,619	-7.5	0	1	-68.0
Total for the 25		\$72,712	\$71,777	1.3	\$23,846	\$22,937	4.0

From Global Marketers 2013 (Dec. 9, 2013). See 10 biggest advertisers for 95 countries and regions, report methodology and links to measured-media tracking services by country: AdAge.com/globalmarketers2013.

Source: Ad Age DataCenter analysis of data from measured-media tracking services. Numbers rounded.

U.S. market leaders by category

With U.S. measured-media ad spending from Kantar Media (dollars in millions).

AUTO MARKETERS

Market share of U.S. auto/light-truck market

RANK 2012	MARKETER	MARKET SHARE 2012	MEASURED MEDIA 2012
1	General Motors Co.	17.9%	\$1,655
2	Ford Motor Co.	15.5	1,065
3	Toyota Motor Corp.	14.4	1,245
4	Fiat (Chrysler Group)	11.4	1,148
5	Honda Motor Co.	9.8	851
6	Nissan Motor Co.	7.9	771
7	Hyundai Motor Co.	4.9	290
8	Volkswagen	4.2	546
9	Kia Motors Corp.	3.8	393
10	BMW	2.4	176
Industry total (2012 vehicles sold in millions)		14.5	\$8,892

WIRELESS

Market share of wireless-service providers

RANK 2012	CARRIER, PARENT	MARKET SHARE 2012	MEASURED MEDIA 2012
1	Verizon Wireless ¹	31.2%	\$1,193
2	AT&T ²	27.3	1,250
3	Sprint ³	15.7	810
4	T-Mobile US	11.6	887
5	Tracfone America Movil	7.6	136
6	U.S. Cellular TDS	1.9	57
7	Cricket Leap Wireless International ²	1.7	76
Top 7		97.1	4,409
All other		2.9	921
Industry total (2012 subscribers in millions)		326.5	\$5,330

CREDIT CARDS

Market share based on card purchase volume

RANK 2012	MARKETER, PARENT	MARKET SHARE 2012	MEASURED MEDIA 2012
1	American Express Co.	25.4%	\$281
2	Chase JPMorgan Chase & Co.	18.7	277
3	Bank of America	11.4	142
4	Citigroup	8.8	292
5	Capital One Financial Corp.	6.6	317
6	Discover Financial Services	4.7	148
7	U.S. Bancorp	4.0	3
8	Wells Fargo & Co.	2.9	4
9	Barclays	1.7	3
10	USAA	1.5	NA
Industry total (purchase volume, \$ in trillions)		\$2.2	\$2,162

INSURANCE

Share of insurance-industry ad spending

RANK 2012	MARKETER, PARENT	SHARE OF AD SPENDING 2012	MEASURED MEDIA 2012
1	Geico Berkshire Hathaway	18.3%	\$921
2	Allstate Corp.	11.9	602
3	State Farm Mutual Auto Ins. Co.	11.7	590
4	Progressive Corp.	9.8	493
5	Nationwide Mutual Ins. Co.	5.0	251
6	UnitedHealth Group	3.9	197
7	Zurich Financial Svcs. Group	3.8	194
8	American Family Mutual Ins. Co.	3.2	160
9	Liberty Mutual Insurance	3.1	158
10	Aflac	2.1	106
Total insurance-industry ad spending		100.0	\$5,039

From Ad Age's 100 Leading National Advertisers 2013, Part 2 (July 8, 2013). Numbers rounded. Expanded footnotes and source information: AdAge.com/Ina2013. Source: Measured-media spending from WPP's Kantar Media. Dollars in millions. More info: kantarmedia.com. Other sources: **Auto marketers:** Automotive News Data Center (sales). More info: autonews.com. **Wireless:** ComScore MobiLens (market share); CTIA (subscribers). More info: comscore.com; ctia.org. 1. Verizon Communications in first-quarter 2014 expects to complete purchase of Vodafone Group's 45% stake in Verizon Wireless. 2. AT&T in July 2013 signed deal to buy Leap Wireless. 3. Japan's SoftBank Corp. in July 2013 bought 78% stake in Sprint Corp. (formerly Sprint Nextel Corp.). **Credit cards:** The Nilson Report. More info: nilsonreport.com. Market share of general-purpose credit cards based on 2012 total purchase volume in dollars for U.S. credit-card issuers.



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U.S. market leaders by category

With U.S. measured-media ad spending from Kantar Media (dollars in millions).

RETAIL

Ranking based on measured spending

RANK 2012	MARKETER	SHARE OF U.S. RETAIL SALES 2012	MEASURED MEDIA 2012
1	Macy's	1.0%	\$842
2	Walmart Stores	11.5	762
3	Target Corp.	2.5	672
4	Sears Holdings Corp.	1.2	642
5	J.C. Penney Co.	0.5	506
6	Home Depot	2.3	471
7	Lowe's Cos.	1.7	360
8	Kohl's Corp.	0.7	356
9	Best Buy Co.	1.3	342
10	Gap Inc.	0.4	340
Industry total (2012 U.S. sales, \$ in trillions)		\$2.9	\$16,468

PERSONAL-CARE BRANDS

Share of personal-care ad spending

RANK 2012	BRAND, PARENT	SHARE OF AD SPENDING 2012	MEASURED MEDIA 2012
1	L'Oréal Paris L'Oréal	7.6%	\$525
2	Maybelline New York L'Oréal	4.7	325
3	Garnier L'Oréal	3.8	266
4	CoverGirl Procter & Gamble Co.	3.8	261
5	Olay Procter & Gamble Co.	3.6	252
6	Dove Unilever	2.9	199
7	Crest Procter & Gamble Co.	2.8	192
8	Gillette Procter & Gamble Co.	2.6	179
9	Clinique Estée Lauder Cos.	2.0	135
10	Estée Lauder Estée Lauder Cos.	1.9	133
Total personal-care ad spending		100.0	\$6,930

RESTAURANTS

Market share based on U.S. systemwide sales

RANK 2012	CHAIN, PARENT	MARKET SHARE 2012	MEASURED MEDIA 2012
1	McDonald's McDonald's Corp.	8.18%	\$957
2	Subway Doctor's Associates	2.78	516
3	Starbucks Starbucks Corp.	2.44	70
4	Wendy's Wendy's Co.	1.98	280
5	Burger King Burger King Worldwide	1.97	256
6	Taco Bell Yum Brands	1.74	280
7	Dunkin' Donuts Dunkin' Brands Group	1.44	119
8	Pizza Hut Yum Brands	1.32	239
9	KFC Yum Brands	1.07	263
10	Chick-fil-A Chick-fil-A	1.06	32
Industry total (U.S. sales, \$ in billions)		\$434.9	\$6,111

BEVERAGE BRANDS

Market share based on U.S. sales volume

RANK 2012	BRAND, PARENT	MARKET SHARE 2012	MEASURED MEDIA 2012
1	Coke Coca-Cola Co.	14.37%	\$243
2	Pepsi PepsiCo	7.46	274
3	Mountain Dew PepsiCo	4.52	44
4	Dr Pepper Dr Pepper Snapple Group	4.08	96
5	Gatorade PepsiCo	3.42	101
6	Nestlé Pure Life Nestlé	3.00	21
7	Sprite Coca-Cola Co.	2.84	10
8	Poland Spring Nestlé	2.25	4
9	Dasani Coca-Cola Co.	1.98	5
10	Tropicana PepsiCo	1.77	63
Industry total (2012 gallons in billions)		29.8	\$1,766



What advertising or promotion closed this deal?

The banner ad served up last week? That social media promotion? The long-term engagement that made her a brand advocate? Or all of the above? Let's just say it was the real-time insights used to optimize media planning, buying, and cross-channel measurement all from a single marketing platform. To learn more, call 877.400.2296 or visit www.startknowing.biz/realtime.

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From Ad Age's 100 Leading National Advertisers 2013, Part 2 (July 8, 2013). Numbers rounded. Expanded footnotes and source information: AdAge.com/Ina2013. Source: Measured-media spending from WPP's Kantar Media. Dollars in millions. More info: kantarmedia.com. Other sources: Retail: company filings; Census Bureau (U.S. retail sales). More info: census.gov. Restaurants: 2013 Technomic Top 500 Chain Restaurant Report (report's 2012 sales figures used to calculate market share). More info: technomic.com. Systemwide sales is franchised plus company-owned restaurants. 1. Share based on estimated sales. Beverage brands: Beverage Marketing Corp. More info: beveragemarketing.com.

U.S. ad spending totals by medium from Kantar Media

Measured-media spending. 100 LNA¹ totals. Dollars in millions.

MEDIUM	KANTAR MEASURED-MEDIA FOR TOTAL U.S.			100 LNA MEASURED-MEDIA; AND UNMEASURED SPENDING		
	2012	2011	% CHG	2012	2011	% CHG
Consumer, Sunday, B-to-B and local magazine	\$23,825	\$24,395	-2.3	\$8,199	\$8,443	-2.9
National and local newspaper; free-standing insert	18,878	19,369	-2.5	4,160	4,372	-4.8
Network TV	27,434	24,846	10.4	18,471	17,174	7.5
Spot TV	17,091	15,565	9.8	4,085	4,288	-4.7
National syndicated TV	5,133	4,746	8.1	3,214	2,829	13.6
Cable TV network	24,373	23,582	3.4	11,813	11,502	2.7
Network, national spot and local radio	8,361	8,135	2.8	2,439	2,423	0.6
Outdoor	4,221	4,015	5.1	1,171	1,100	6.5
Internet display	10,279	10,590	-2.9	4,485	4,668	-3.9
Subtotal: measured media	139,594	135,243	3.2	58,036	56,799	2.2
Subtotal: unmeasured spending²	NA	NA	NA	46,446	44,882	3.5
Total U.S. spending	NA	NA	NA	\$104,482	\$101,681	2.8

From 100 Leading National Advertisers (June 24, 2013). See full report and methodology at AdAge.com/lna2013. See 100 Leading National Advertisers database including profiles, agency rosters and executives, updated in December 2013: AdAge.com/marketertrees2013update.

Source: Ad Age DataCenter. Measured-media spending by medium from WPP's Kantar Media. More info: kantarmedia.com. Network TV includes Spanish-language networks. Local newspaper includes Spanish-language newspapers. Consumer magazine includes Spanish-language magazines. 1. 100 Leading National Advertisers. 2. Unmeasured spending figures are Ad Age DataCenter estimates including direct marketing, promotion, internet paid search, internet video, social media and other forms of spending not included in measured media.

U.S. ad spending forecast from ZenithOptimedia

Estimated spending in major media and marketing services. Total in 2014: \$390 billion, up 3.2%.

SECTOR	2014 SPENDING (\$ BILLIONS)	2014 VS. 2013 % CHG	2013 VS. 2012 % CHG	SECTOR	2014 SPENDING (\$ BILLIONS)	2014 VS. 2013 % CHG	2013 VS. 2012 % CHG
	MAJOR MEDIA				MARKETING SERVICES		
TV	\$67.0	4.1%	2.9%	Direct mail	\$47.4	-1.7%	-3.0%
Radio	17.4	1.9	2.1	Telemarketing	52.9	1.0	2.0
Magazines	17.1	-2.7	-2.4	Sales promotion	72.5	3.1	3.3
Newspapers	21.1	-8.0	-8.0	Public relations	4.4	7.1	5.6
Internet	43.0	18.4	18.2	Event sponsorship	30.2	8.4	8.1
Outdoor and cinema	9.1	5.0	4.5	Directories	8.2	-3.0	-5.2
Subtotal: major media	\$174.7	4.7%	3.5%	Subtotal: marketing services	\$215.6	2.0%	1.7%
				Total: media and mktg. svcs.	\$390.3	3.2%	2.5%

Source: Publicis Groupe's ZenithOptimedia (Advertising Expenditure Forecasts, December 2013). More info: zenithoptimedia.com.

25 largest global advertising markets

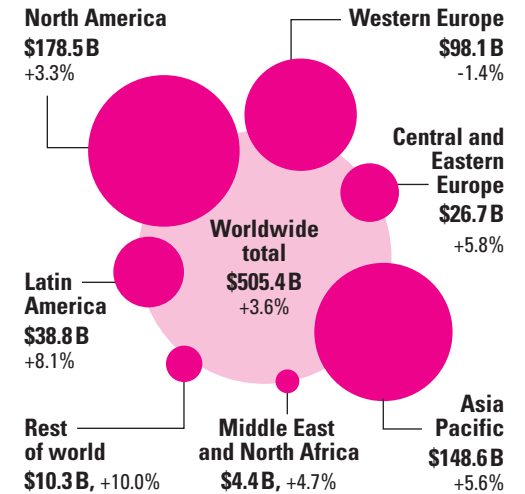
Major-media ad spending by market from ZenithOptimedia. Dollars in billions. The U.S. accounted for 33.0% of 2013 worldwide ad spending but just 4.4% of world population.

RANK	MARKET	2013 MAJOR-MEDIA SPENDING	2012	% CHG
1	U.S.	\$166.90	\$161.24	3.5
2	Japan	52.84	51.74	2.1
3	China	40.95	37.20	10.1
4	Germany	23.18	23.43	-1.1
5	United Kingdom	20.34	19.38	5.0
6	Brazil	15.86	15.30	3.7
7	Australia	13.07	12.81	2.0
8	France	12.15	12.49	-2.8
9	Canada	11.59	11.63	-0.4
10	South Korea	10.61	10.74	-1.2
11	Russia	10.34	9.21	12.3
12	Indonesia	7.40	6.15	20.4
13	Italy	6.28	7.28	-13.8
14	India	5.86	5.43	8.0
15	Switzerland	5.72	5.66	1.0
16	Argentina	5.67	4.49	26.3
17	Mexico	5.50	5.20	5.8
18	Spain	5.33	5.95	-10.4
19	Netherlands	4.82	4.84	-0.5
20	Belgium	4.64	4.63	0.2
21	South Africa	4.39	4.02	9.2
22	Thailand	4.37	3.85	13.6
23	Austria	4.23	4.18	1.2
24	Sweden	3.42	3.52	-2.8
25	Turkey	3.18	2.82	12.5
Total worldwide		\$505.42	\$487.82	3.6

Source: Publicis Groupe's ZenithOptimedia (Advertising Expenditure Forecasts, December 2013). More info: zenithoptimedia.com.

Worldwide major-media ad spending by region

2013 major-media ad spending worldwide and percent change vs. 2012 from ZenithOptimedia.



Numbers rounded. Major media: TV, internet, newspaper, magazine, radio, outdoor and cinema. Source: ZenithOptimedia (Advertising Expenditure Forecasts, December 2013). More info: zenithoptimedia.com.

Ad spending per person

Per capita spending by market for five highest and five lowest among 25 largest markets, according to ZenithOptimedia. The bottom five are growing near or above double-digit rates.

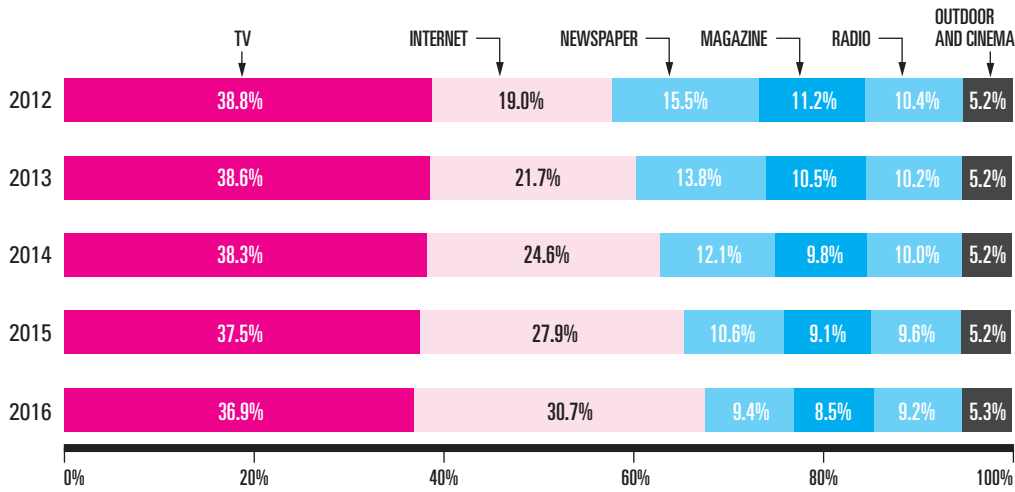
RANK	MARKET	2014 MAJOR-MEDIA SPENDING PER CAPITA	2013	% CHG
1	Switzerland	\$741	\$734	1.0
2	Australia	559	556	0.4
3	U.S.	552	529	4.4
4	Austria	507	500	1.4
5	Belgium	430	427	0.7
21	Mexico	51	46	9.5
22	Turkey	47	43	8.7
23	China	33	30	10.0
24	Indonesia	35	29	19.1
25	India	5	5	9.7

Source: Publicis Groupe's ZenithOptimedia (Advertising Expenditure Forecasts, December 2013). Numbers rounded. More info: zenithoptimedia.com.

MEDIA

Share of U.S. ad spending by medium

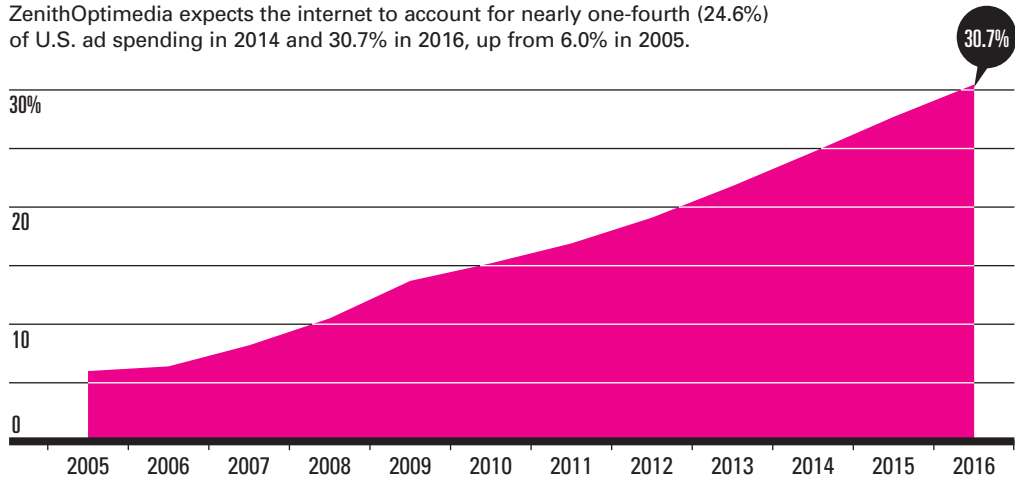
The internet in 2012 passed newspapers to become the nation's second-biggest ad medium, behind TV, according to ZenithOptimedia.



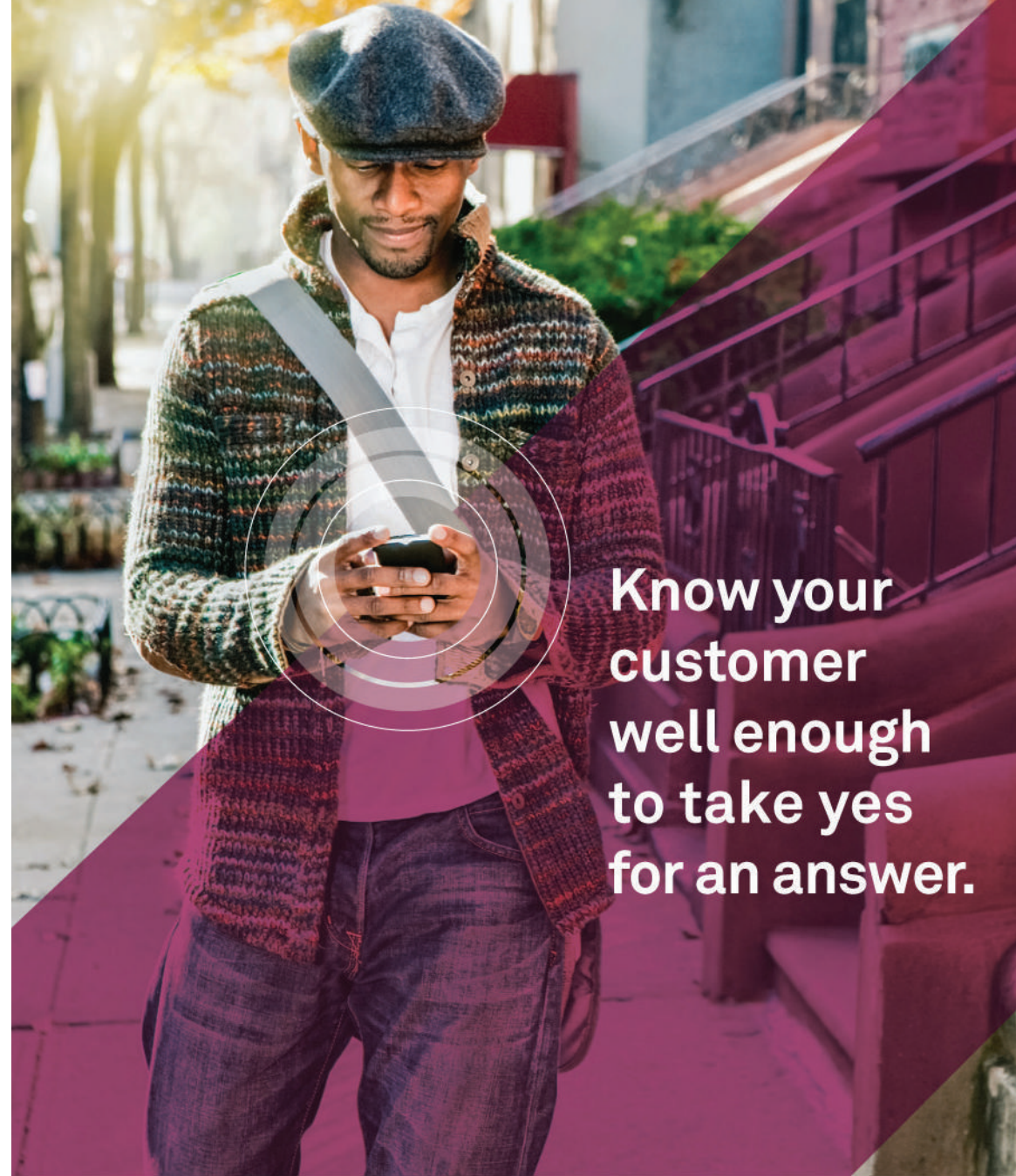
Source: ZenithOptimedia (Advertising Expenditure Forecasts, December 2013). Numbers rounded. More info: zenithoptimedia.com.

Internet's share of U.S. ad spending

ZenithOptimedia expects the internet to account for nearly one-fourth (24.6%) of U.S. ad spending in 2014 and 30.7% in 2016, up from 6.0% in 2005.



Source: ZenithOptimedia (Advertising Expenditure Forecasts, December 2013). Numbers rounded. More info: zenithoptimedia.com.



Know your customer well enough to take yes for an answer.

The key to making budgets work harder is to know how and when to reach a predisposed customer—and when you already have. All so you can effectively deliver the right message to the right customer at the time and place that gets results. Yes, you really can aggregate and analyze multiple sources of data to make your media buying work harder. To learn more, call 877.400.2296 or visit www.startknowing.biz/realtime.

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Information Industry Outlook 2013: The New Normal
— Outsell, Inc. 2013

“Neustar...is amassing a wealth of market data that can be analyzed instantly and turned into real-time market intelligence. That type of data is pure gold for marketers.”

Real Time, Big Data for Marketers
— Outsell, Inc. 2012

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Time spent using media

In 2013, time spent using digital media overtook time spent watching TV.

MEDIUM	AVERAGE MINUTES PER DAY					
	2008	2009	2010	2011	2012	2013
TV	254	267	264	274	278	271
Print	63	55	50	44	38	32
Newspaper	38	33	30	26	22	18
Magazine	25	22	20	18	16	14
Radio	102	98	96	94	92	86
Other media	37	35	45	37	18	7
Video game (excluding game-console internet)	8	11	12	13	11	8
Digital	164	177	191	229	273	316
Online	131	140	142	153	147	139
Online video	3	3	6	13	24	25
Online social network	8	16	25	35	39	40
Other online	120	121	111	105	84	74
Mobile	19	20	24	48	95	141
Feature phone	17	15	13	14	11	11
Mobile internet	5	5	5	6	5	5
Smartphone	3	5	10	22	43	67
Mobile internet	1	3	6	17	35	54
Mobile social network	0	0	1	4	10	19
Mobile video	0	0	0	2	4	8
Tablet	0	0	1	12	40	63
Mobile internet	0	0	1	6	24	43
Mobile social network	0	0	0	1	5	12
Mobile video	0	0	0	1	4	12
Other digital (including game-console internet and connected set-top boxes)	14	17	26	28	31	36
Total media minutes	620	632	646	678	699	712

Source: eMarketer, July 2013. More info: emarketer.com. 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. See more time-use data on Pages 31-33.

15 largest U.S. multiplatform web properties

By September 2013 unique visitors in thousands.

RANK	PROPERTY	TOTAL DIGITAL POPULATION	DESKTOP	MOBILE	MOBILE ONLY	DESKTOP ONLY	DESKTOP/MOBILE OVERLAP
1	Google sites	228,196	204,098	119,803	24,098	108,393	95,705
2	Yahoo sites	222,584	198,051	111,408	24,533	111,176	86,875
3	Microsoft sites	192,014	175,896	66,285	16,118	125,729	50,167
4	Facebook	182,144	144,454	110,451	37,691	71,693	72,761
5	Amazon sites	162,579	119,681	90,366	42,898	72,213	47,468
6	AOL sites	156,144	132,766	71,038	23,378	85,105	47,661
7	Apple sites	130,515	77,760	75,768	52,755	54,747	23,014
8	CBS Interactive	118,027	91,645	57,022	26,382	61,004	30,640
9	Wikimedia Foundation sites	116,835	84,666	60,396	32,169	56,439	28,227
10	Glam Media	116,146	90,297	49,627	25,850	66,519	23,778
11	Turner Digital	109,537	83,324	53,995	26,213	55,542	27,782
12	eBay	93,884	68,971	50,783	24,913	43,101	25,870
13	Ask Network	90,092	70,943	31,429	19,149	58,662	12,281
14	About	84,169	59,327	36,044	24,842	48,126	11,202
15	Weather Co.	83,447	52,322	46,226	31,125	37,221	15,101
Total digital audience		241,759	225,271	146,807	16,487	94,952	130,320

Source: ComScore, September 2013. More info: comscore.com.

U.S. net mobile ad revenue

For selected companies. Dollars in millions.

COMPANY	ESTIMATED REVENUE FROM MOBILE		
	2013	2012	% CHG
Apple (iAd)	\$258	\$124	108.1
Facebook	1,532	391	291.8
Google	3,984	2,171	83.5
Millennial Media	109	61	78.7
Pandora	372	238	56.3
Twitter	312	114	173.7
YP	378	252	50.0
Others	2,654	1,012	162.3
Total	\$9,599	\$4,363	120.0

Source: eMarketer, December 2013. More info: emarketer.com.

Largest U.S. online video properties

RANK	PROPERTY	TOTAL UNIQUE VIEWERS (000)	VIDEOS VIEWED (000)
1	Google sites	164,819	16,595,857
2	Facebook	70,055	1,365,771
3	AOL	62,273	1,276,425
4	NDN	50,555	603,047
5	Vevo	49,608	650,227
6	Amazon sites	44,287	191,849
7	Yahoo sites	42,334	357,063
8	Microsoft sites	38,895	697,377
9	Vimeo	32,851	131,600
10	Maker Studios	30,475	517,104

Source: ComScore, October 2013. More info: comscore.com.

Top TV programs by average number of viewers age 2+



Super Bowl on CBS:
Top individual telecast, 2013 to date (108.7 million viewers)



NBC Sunday Night Football:
Top prime-time broadcast program watched live plus same-day viewing: (21.7 million viewers)¹



NCIS on CBS:
Top prime-time broadcast regularly scheduled program (non-sports) watched live plus same-day viewing (14.7 million viewers)¹



The Bridge on FX:
Top time-shifted program of 2013 (164.3% lift in viewership when factoring in time-shifted viewing)²

Source: Nielsen. More info: nielsen.com. Photos via CBS, NBC and FX. 1. Dec. 31, 2012, to Dec. 8, 2013. Broadcast prime. Ranked on persons 2+ rating. 2. Dec. 31, 2012, to Nov. 24, 2013. Among all prime-time broadcast and cable programs.

Largest U.S. TV networks

By 2012 measured ad spending. Dollars in millions.

BROADCAST TV

RANK	NETWORK, COMPANY	MEASURED AD SPENDING ON EACH NETWORK		
		2012	2011	% CHG
1	CBS CBS Corp.	\$6,448	\$6,260	3.0
2	NBC Comcast Corp. (NBC Universal)	6,157	4,198	46.7
3	Fox 21st Century Fox	4,944	5,166	-4.3
4	ABC Walt Disney Co.	4,927	4,923	0.1
5	Univision Broadcasting Media Partners (Univision Communications)	2,877	2,181	31.9
6	Telemundo Comcast Corp. (NBC Universal)	973	915	6.3
7	CW CBS Corp. 50%/Time Warner 50%	497	542	-8.3
8	UniMas (formerly TeleFutura) Broadcasting Media Partners (Univision Communications)	447	512	-12.6

CABLE TV

RANK	NETWORK, COMPANY	MEASURED AD SPENDING ON EACH NETWORK		
		2012	2011	% CHG
1	ESPN Walt Disney Co.	\$2,290	\$2,063	11.0
2	TNT Time Warner (Turner Broadcasting System)	1,428	1,345	6.2
3	TBS Time Warner (Turner Broadcasting System)	1,165	1,050	11.0
4	USA Comcast Corp. (NBC Universal)	1,015	1,174	-13.6
5	MTV Viacom	866	900	-3.7
6	Comedy Central Viacom	813	746	8.9
7	Nickelodeon ¹ Viacom	769	959	-19.7
8	Bravo Comcast Corp. (NBC Universal)	742	693	7.0
9	Discovery Channel Discovery Communications	662	640	3.5
10	HGTV Scripps Networks Interactive	660	637	3.6

Source: Kantar Media. More info: kantarmediana.com. 1. Excludes Nick at Nite.

10 largest U.S. magazines

By 2012 total U.S. ad pages from Publishers Information Bureau. Measured magazine ad spending in millions of dollars from PIB.

RANK	MAGAZINE, COMPANY	TOTAL MEASURED ADVERTISING PAGES			TOTAL MEASURED AD SPENDING		
		2012	2011	% CHG	2012	2011	% CHG
1	People Time Warner (Time Inc.) ¹	3,155.50	3,356.93	-6.0	\$993.3	\$996.8	-0.4
2	InStyle Time Warner (Time Inc.) ¹	2,683.26	2,544.92	5.4	435.2	389.8	11.6
3	Vogue Advance Publications (Condé Nast)	2,602.08	2,509.66	3.7	422.6	389.6	8.5
4	Elle Hearst Corp.	2,454.76	2,314.75	6.0	367.0	331.1	10.9
5	New York Magazine New York Media	2,441.25	2,607.95	-6.4	198.0	203.6	-2.7
6	Brides Advance Publications (Condé Nast)	2,335.82	2,603.44	-10.3	207.6	222.4	-6.7
7	Flex American Media	2,283.01	2,050.75	11.3	32.4	29.4	10.5
8	New York Times Magazine The New York Times Co.	2,132.17	2,203.76	-3.2	249.3	258.8	-3.7
9	Texas Monthly Emmis Communications Corp.	1,943.15	1,813.15	7.2	75.0	69.9	7.4
10	Harper's Bazaar Hearst Corp.	1,840.19	1,656.31	11.1	234.6	201.4	16.5

Source: MPA - The Association of Magazine Media; Publishers Information Bureau. More info: magazine.org. 1. Time Warner plans to spin off Time Inc. as separate public company in 2014.

Paper trail: Newspaper sales and spinoffs

As the embattled newspaper industry continues to grapple with competition from digital-media rivals, major-media companies are selling or spinning off papers. Selected deals involving major newspapers in 2013:



NEWS CORP.

21st Century Fox (formerly old News Corp.) in June 2013 spun off publishing and some other operations into new News Corp. The company's newspaper holdings include The Wall Street Journal and the New York Post. 21st Century Fox is focused on global entertainment and media including cable TV, broadcast TV and movies.



TRIBUNE CO.

Tribune Co. in July 2013 announced its intent to spin off its newspaper business, Tribune Publishing, as a standalone public company. Tribune Publishing's properties include the Chicago Tribune and the Los Angeles Times. Tribune Co., which emerged from Chapter 11 bankruptcy reorganization in December 2012, will focus on a growing portfolio of local TV stations and other holdings.



WASHINGTON POST

Amazon CEO Jeff Bezos in October 2013 paid \$250 million to acquire The Washington Post from Graham Holdings Co. (formerly The Washington Post Co.) Graham Holdings' businesses include education services (Kaplan), local TV stations, cable systems and online magazine Slate. The Post is part of Mr. Bezos' private investment firm, Nash Holdings.



BOSTON GLOBE

The New York Times Co. in October 2013 sold its New England Media Group, including The Boston Globe, for about \$70 million to John Henry, principal owner of the Boston Red Sox. The New York Times Co. bought the Globe and affiliated properties in 1993 for \$1.1 billion.

Source: company filings and disclosures, Ad Age DataCenter research.

Cost per 30-second spot

Ad Age's annual show-by-show guide to the price of TV commercials.

	abc	CBS	NBC	FOX	THE CW
SUNDAY	7 PM AMERICA'S FUNNIEST HOME VIDEOS \$63,129	60 MINUTES \$104,190	FOOTBALL NIGHT IN AMERICA NA		BLANK SPACE INDICATES NO NETWORK PROGRAMMING
	8 PM ONCE UPON A TIME \$173,062	THE AMAZING RACE \$101,522	SUNDAY NIGHT FOOTBALL \$593,694	THE SIMPSONS \$231,532 BOB'S BURGERS \$135,733	
	9 PM REVENGE \$114,002	THE GOOD WIFE \$70,446	9 PM BELIEVE \$77,678	FAMILY GUY \$206,551	
	10 PM BETRAYAL RESURRECTION \$105,447 \$138,022	THE MENTALIST \$74,330	9:30 PM CRISIS \$90,433	AMERICAN DAD \$144,642	
MONDAY	8 PM DANCING WITH THE STARS \$106,342	HIMYM ¹ \$165,999 2 BROKE GIRLS \$175,506	THE VOICE \$294,038	BONES \$159,932 ALMOST HUMAN ^{LF} \$145,613	HART OF DIXIE \$27,691
	9 PM	MIKE & MOLLY NA MOM \$139,070		SLEEPY HOLLOW \$137,610 THE FOLLOWING \$211,832	BEAUTY & THE BEAST \$21,817
	10 PM CASTLE \$124,050	HOSTAGES INTELLIGENCE \$133,185 \$129,422	THE BLACKLIST \$201,650		
TUESDAY	8 PM MARVEL'S AGENTS OF S.H.I.E.L.D. \$151,305	NCIS \$160,264	THE BIGGEST LOSER \$91,672	DADS \$148,188 BROOKLYN NINE-NINE \$146,697	THE ORIGINALS \$39,406
	9 PM THE GOLDBERGS \$108,180 TROPHY WIFE \$80,634	NCIS LA \$121,699	THE VOICE \$278,987 9 PM ABOUT A BOY \$146,203 9:30 PM THE FAMILY GUIDE \$125,900	NEW GIRL \$236,857 THE MINDY PROJECT \$117,987	SUPERNATURAL \$39,410
	10 PM LUCKY 7, CANCELED \$82,746	PERSON OF INTEREST \$136,710	CHICAGO FIRE \$130,963		
WEDNESDAY	8 PM THE MIDDLE \$120,983 BACK IN THE GAME \$94,213	SURVIVOR \$120,822	REVOLUTION \$87,188	THE X FACTOR \$179,034 AMERICAN IDOL \$355,943	ARROW \$47,859
	9 PM MODERN FAMILY \$281,951 SUPER FUN NIGHT \$127,848	CRIMINAL MINDS \$119,052	LAW & ORDER: SVU \$73,477		THE TOMORROW PEOPLE \$40,807
	10 PM NASHVILLE \$107,591	CSI \$113,628	IRONSIDE, CANCELED \$78,097		

	abc	CBS	NBC	FOX	THE CW
THURSDAY	8 PM WONDERLAND ² \$97,136	BIG BANG THEORY \$316,912 THE MILLERS \$174,442	PARKS & RECREATION \$78,146 WELCOME TO THE FAMILY, CANCELED \$62,368	THE X FACTOR RESULTS \$169,255 AMERICAN IDOL RESULTS \$289,942	THE VAMPIRE DIARIES \$55,788
	9 PM GREY'S ANATOMY \$204,658	THE CRAZY ONES \$167,569 TWO & A HALF MEN \$183,904	SEAN SAVES THE WORLD \$80,939 MICHAEL J. FOX SHOW \$95,663	GLEE \$171,757	REIGN \$37,622
	10 PM SCANDAL \$207,053	ELEMENTARY \$127,700	PARENTHOOD \$89,278		
FRIDAY	8 PM LAST MAN STANDING \$75,124 THE NEIGHBORS \$69,937	UNDERCOVER BOSS \$65,096	DATELINE NBC \$49,809	MASTERCHEF JUNIOR \$86,478 RAISING HOPE ^{LF} \$76,350	THE CARRIE DIARIES \$23,538
	9 PM SHARK TANK \$80,328	HAWAII FIVE-O \$61,160	GRIMM \$84,760	ENLISTED ^{LF} \$67,789	AMERICA'S NEXT TOP MODEL \$25,513
	10 PM 20/20 \$64,838	BLUE BLOODS \$59,863	DRACULA CROSSBONES \$59,705 \$66,190		
SATURDAY	7 PM			FOX SPORTS SATURDAY NA	
	8 PM COLLEGE FOOTBALL MOVIES \$110,068 \$27,739	COMEDYTIME SATURDAY \$24,909			
	9 PM				
	10 PM 48 HOURS \$32,150				
	11 PM			ANIMATION DOMINATION NA	

From "How much for a 30-second spot," Oct. 21, 2013. Updated December 2013.

Source: Ad Age compiled its survey using data from as many as seven media-buying agencies. Prices should be taken as directional indications, not the actual numbers advertisers pay for a spot, as estimates can vary depending on the amount of inventory purchased from a network and the relationship an advertiser has with a network.

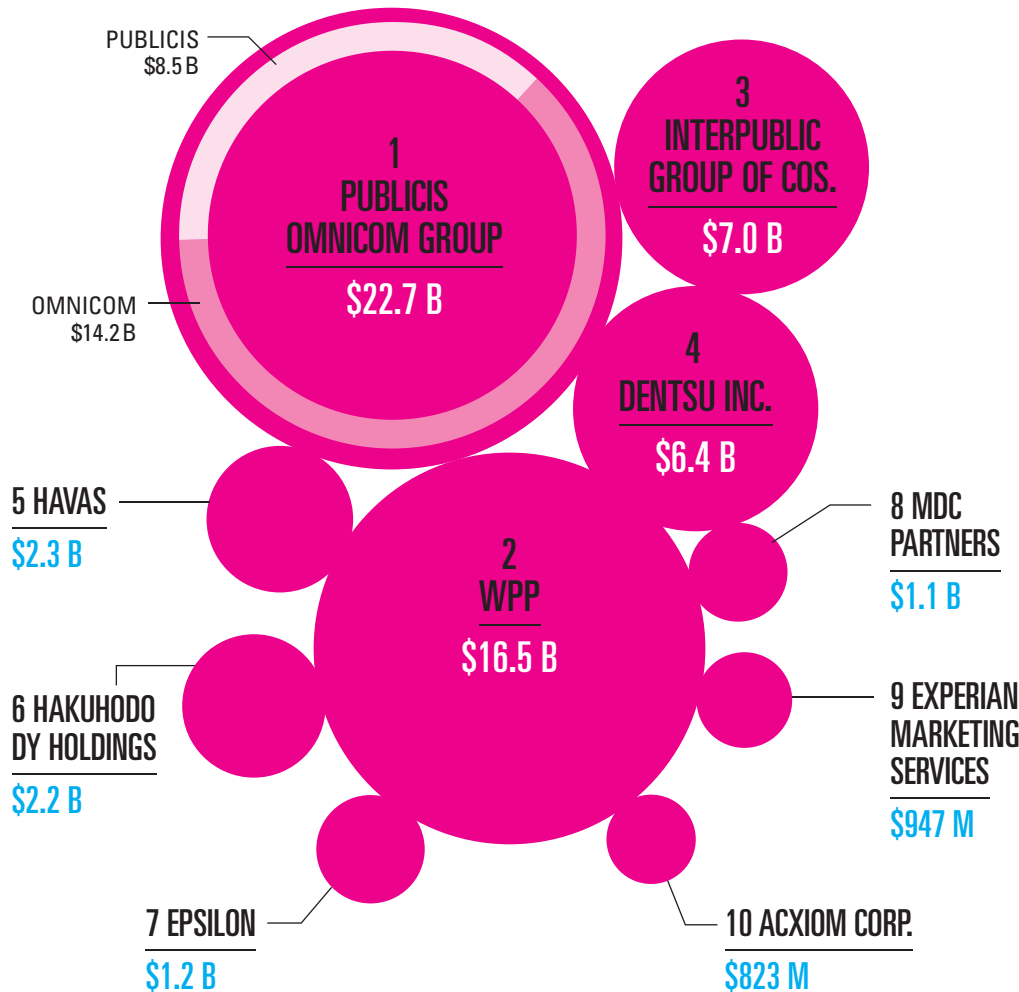
Ad Age's survey was based on what advertisers paid during 2013's upfront market. Prices may have changed for those purchasing closer to air date or in the "scatter" market.

- How I Met Your Mother
 - Once Upon a Time in Wonderland
- LF=LATE FALL
- Midseason replacements

AGENCIES

How a megamerger could reorder the world's 10 largest agency companies

Worldwide 2012 revenue. Publicis Omnicom Group figure reflects combined 2012 revenue of Publicis Groupe and Omnicom Group, which in July 2013 announced plans to merge. Publicis and Omnicom hope to complete the deal in early 2014, displacing WPP as the world's biggest agency company.



From Ad Age (Sept. 9, 2013). See expanded data at AdAge.com/agencyfamilytrees2013. Source: Worldwide 2012 revenue from company documents except for Dentsu Inc., Hakuodo DY Holdings and Alliance Data Systems Corp.'s Epsilon, which are Ad Age DataCenter estimates. Dentsu Inc. is a pro forma estimate including Aegis Group (acquired in March 2013). Epsilon is a pro forma estimate including Hyper Marketing (purchased in November 2012).

World's largest agency networks

By 2012 estimated worldwide revenue. Dollars in millions.

RANK	NETWORK, COMPANY	SELECTED UNITS	WORLDWIDE REVENUE 2012	% CHG
1	Dentsu (Japan) Dentsu Inc.	Dentsu Inc.'s network of agencies in Japan	\$3,577	+6.0
2	Young & Rubicam Group WPP	Y&R, Wunderman, Burson-Marsteller, Cohn & Wolfe, Landor Associates, Sudler & Hennessey	3,400	+1.7
3	McCann Worldgroup Interpublic	McCann Erickson Worldwide, Weber Shandwick ¹ , MRM, Momentum, McCann Health, Martin Agency	2,965	+0.8
4	DDB Worldwide Communications Group Omnicom	DDB Worldwide, Rapp, Interbrand, Tribal Worldwide, DDB Health/DDB Remedy, TracyLocke	2,655	+0.6
5	Ogilvy & Mather WPP	Ogilvy & Mather Advertising, OgilvyOne, Ogilvy Public Relations, OgilvyAction ² , Ogilvy CommonHealth, Neo@Ogilvy	2,413	+4.8
6	BBDO Worldwide Omnicom	BBDO Worldwide, Proximity Worldwide, Clemenger Group, Organic	2,403	+3.5
7	TBWA Worldwide Omnicom	TBWA Worldwide, Integer Group, E-Graphics Worldwide, Zimmerman Advertising	1,797	+1.7
8	Publicis Worldwide Publicis	Publicis Worldwide, Publicis Modem	1,524	+0.3
9	Hakuhodo Hakuhodo DY Holdings	Hakuhodo in 2012 closed its Los Angeles agency, MZ Advertising	1,357	+14.5
10	Havas Worldwide Havas	Havas Worldwide, Havas Health, Havas PR	1,327	NA
11	JWT WPP	JWT, Digitaria, Lunchbox, <i>JWT Action</i> ² , HeathWallace, JWT Inside	1,320	0.0
12	Leo Burnett Worldwide Publicis	Leo Burnett Worldwide/Arc, Lapiz USA, Amazon Advertising	1,320	+2.2
13	DraftFCB Interpublic	DraftFCB, R/GA ³ , DraftFCB Healthcare	1,303	-7.6
14	Epsilon ⁴ Alliance Data Systems	Epsilon, Catapult	1,223	+6.7
15	Grey Group WPP	Grey, G2 ⁵ , GHG, Wing	995	NA
16	Experian Marketing Services Experian	Experian's marketing-services business segment	947	NA
17	DigitasLBI Publicis	DigitasLBI, MRY, Phonevalley	896	+2.5
18	Saatchi & Saatchi Publicis	Saatchi & Saatchi, Team One, Saatchi & Saatchi X, Conill	886	+3.4
19	Acxiom Corp. Acxiom Corp.	Ranking based on Acxiom's work in marketing services and related areas	823	+0.6
20	SapientNitro Sapient Corp.	Sapient Corp.'s SapientNitro business segment	772	+8.9
21	IBM Interactive IBM Corp.	IBM Corp.'s digital-agency network	717	NA
22	Lowe & Partners Worldwide ⁵ Interpublic	Lowe & Partners, <i>Deutsch</i> ⁵ , Huga ⁵ , ICC Lowe	672	+2.3
23	Edelman DJE Holdings	Edelman, Edelman Berland, Matter	666	+8.3
24	Publicis Healthcare Communications Group Publicis	Digitas Health, Saatchi & Saatchi Wellness, Publicis Life Brands Medicus, Razorfish Healthcare	640	0.0
25	Dentsu Network ⁶ Dentsu Inc.	McGarryBowen, 360i, Dentsu America, Firstborn, Steak, Mitchell Communications Group, Attik	606	+12.5

From Agency Report 2013 (April 29, 2013). See expanded network holdings: AdAge.com/agencyfamilytrees2013. Source: Ad Age DataCenter estimates. Numbers rounded. Ranking based on network configuration as of April 2013. Not all network units shown. Media agencies not included in this ranking. 1. Aligned with McCann Worldgroup. 2. WPP in June 2013 combined G2, OgilvyAction and JWT Action into new agency and network, Geometry Global; the former JWT Action operates as Geometry@JWT. 3. In network but operates autonomously. 4. Estimated pro forma revenue including Hyper Marketing, purchased in November 2012. 5. Figures shown include Deutsch and exclude Lowe Campbell Ewald. Interpublic in July 2013 moved Campbell Ewald into network and renamed agency Lowe Campbell Ewald. At same time, Deutsch moved out of network and became one of Interpublic's unaligned independent agencies. 6. New York-based Dentsu Network is part of London-based Dentsu Aegis Network, an operating unit formed in March 2013 that includes Dentsu Network and Aegis Media. Tokyo-based Dentsu Inc. acquired Aegis Media's parent, Aegis Group, in March 2013.

Largest worldwide agency ventures by category

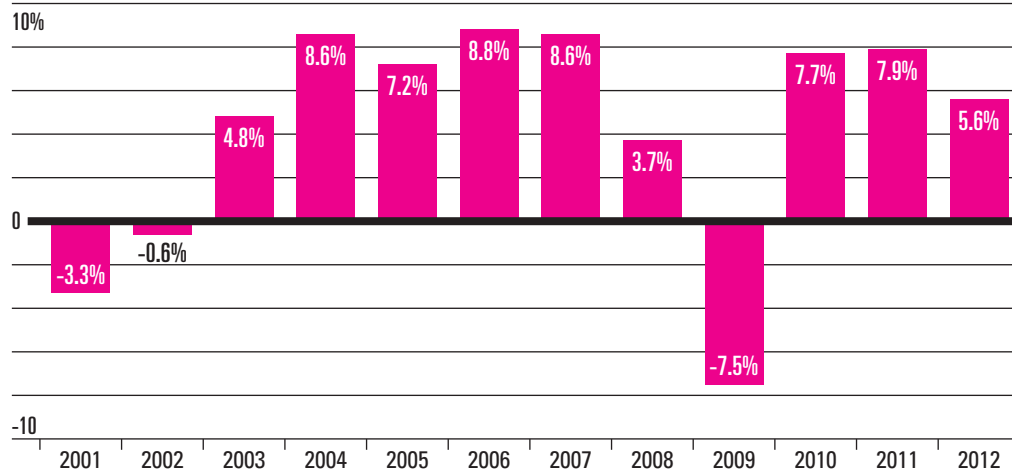
By 2012 estimated worldwide revenue.

CATEGORY / LARGEST VENTURE, PARENT	WORLDWIDE 2012 REVENUE IN CATEGORY	% CHG	WORLDWIDE 2012 REVENUE TOTAL FOR CATEGORY	% CHG
AGENCY COMPANY WPP	\$16.5 billion	+2.5%	50 LARGEST AGENCY COMPANIES \$72.1 billion	+4.5%
AGENCY NETWORK Dentsu (Japan) Dentsu Inc.	\$3.6 billion	+6.0	25 LARGEST AGENCY NETWORKS \$37.2 billion	+3.0
DIGITAL-AGENCY NETWORK Wunderman WPP (Y&R)	\$1.1 billion	+3.4	15 LARGEST DIGITAL-AGENCY NETWORKS \$9.0 billion	+6.2
ADVERTISING AGENCY Dentsu Dentsu Inc.	\$2.7 billion	+6.0	10 LARGEST ADVERTISING AGENCIES \$13.8 billion	+3.0
MEDIA-AGENCY NETWORK Starcom MediaVest Group Publicis	\$1.1 billion	+4.1	10 LARGEST MEDIA-AGENCY NETWORKS \$8.1 billion	+6.2
CRM/DIRECT AGENCY NETWORK Epsilon Alliance Data Systems Corp.	\$1.2 billion	+6.7	10 LARGEST CRM/DIRECT AGENCY NETWORKS \$7.4 billion	+4.2
PUBLIC-RELATIONS AGENCY NETWORK Edelman DJE Holdings	\$666 million	+8.3	10 LARGEST PUBLIC-RELATIONS AGENCY NETWORKS \$4.2 billion	+3.9

From Agency Report 2013 (April 29, 2013). See expanded rankings: AdAge.com/agencyreport2013. Source: Ad Age DataCenter estimates.

U.S. agency revenue growth, 2001-2012

Annual growth rates from Agency Reports.



Source: Ad Age Agency Reports. See more: AdAge.com/agencyreport2013.

Agency Reports' annual growth rates based on U.S. agencies from all disciplines. 2001, 2008 and 2009 were recession years.

Largest U.S. agency ventures by category

By 2012 estimated U.S. revenue.

CATEGORY / LARGEST VENTURE, PARENT	U.S. 2012 REVENUE IN CATEGORY	% CHG	U.S. 2012 REVENUE TOTAL FOR CATEGORY*	% CHG
AGENCY COMPANY Omnicom Group	\$7.4 billion	+4.5%	50 LARGEST AGENCY COMPANIES \$29.9 billion	+5.3%
AGENCY NETWORK McCann Worldgroup Interpublic Group of Cos.	\$1.6 billion	+0.5	25 LARGEST AGENCY NETWORKS \$15.3 billion	+3.4
AGENCIES FROM ALL DISCIPLINES ² Epsilon ³ Alliance Data Systems Corp.	\$1.1 billion	+7.3	926 AGENCIES FROM ALL DISCIPLINES ² \$35.6 billion	+5.6
ADVERTISING AGENCY BBD0 Worldwide Omnicom	\$541 million	+9.3	538 UNITS WITH AD-AGENCY REVENUE \$11.0 billion	+4.8
MEDIA AGENCY Starcom USA Publicis	\$358 million	+2.5	270 UNITS WITH MEDIA-SERVICES REVENUE \$3.3 billion	+7.4
DIGITAL-AGENCY NETWORK SapientNitro Sapient Corp.	\$497 million	+10.3	UNITS IN REPORT WITH DIGITAL REVENUE \$11.6 billion	+6.9
SEARCH MARKETING iCrossing Hearst Corp.	\$110 million	+4.8	233 UNITS WITH SEARCH-MARKETING REVENUE \$1.0 billion	+7.8
MOBILE MARKETING Wunderman WPP (Y&R)	\$52 million	+121.3	231 UNITS WITH MOBILE-MARKETING REVENUE \$855 million	+34.8
CRM/DIRECT AGENCY NETWORK Epsilon ⁴ Alliance Data Systems Corp.	\$1.2 billion	+7.3	222 UNITS WITH CRM/DIRECT-MARKETING REVENUE \$6.6 billion	+3.6
PUBLIC-RELATIONS AGENCY NETWORK Edelman DJE Holdings	\$406 million	+6.0	241 UNITS WITH PUBLIC-RELATIONS REVENUE \$3.9 billion	+5.6
HEALTH-CARE AGENCY NETWORK Publicis Healthcare Comms. Group Publicis	\$505 million	0.0	202 UNITS WITH HEALTH-CARE REVENUE \$3.6 billion	+2.1
PROMOTION AGENCY Integer Group Omnicom (TBWA)	\$166 million	+11.0	236 UNITS WITH PROMOTION REVENUE \$2.9 billion	+9.2
EXPERIENTIAL/EVENT-MARKETING AGENCY George P. Johnson Project WorldWide	\$149 million	+1.9	163 UNITS WITH EXPERIENTIAL/EVENT REVENUE \$1.2 billion	+11.5
HISPANIC-AMERICAN GlobalHue	\$33 million	-3.1	107 UNITS WITH HISPANIC-AMERICAN REVENUE \$598 million	+6.6
AFRICAN-AMERICAN GlobalHue	\$31 million	+1.0	48 UNITS WITH AFRICAN-AMERICAN REVENUE \$184 million	+6.4
ASIAN-AMERICAN AdAsia Communications	\$17 million	NA	35 UNITS WITH ASIAN-AMERICAN REVENUE \$126 million	+7.5

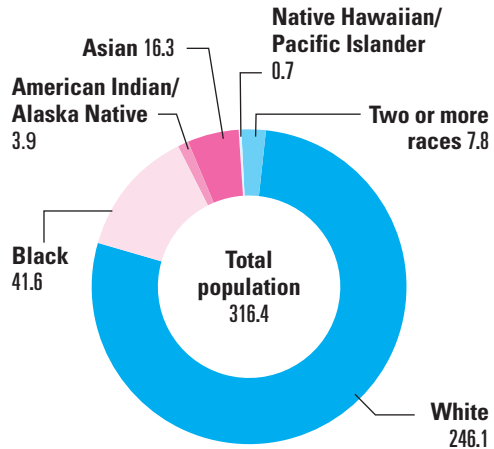
From Agency Report 2013 (April 29, 2013). See expanded rankings: AdAge.com/agencyreport2013. Source: Ad Age DataCenter estimates.

- Unit count in this column shows number of units (agencies) with U.S. revenue in this discipline in Agency Report 2013.
- All Disciplines ranking of 926 agencies from all disciplines in Agency Report 2013.
- Epsilon U.S. agency revenue.
- Epsilon U.S. network CRM/direct revenue.

CONSUMERS

2013 U.S. population by race

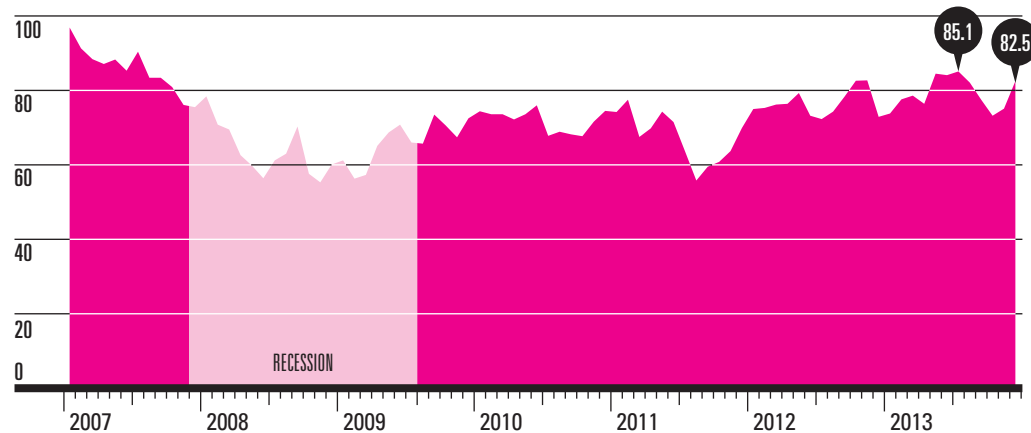
Population in millions.



Source: Census Bureau. Projections for July 2013 from national projections released in December 2012. Numbers rounded. More info: census.gov.

Index of consumer sentiment

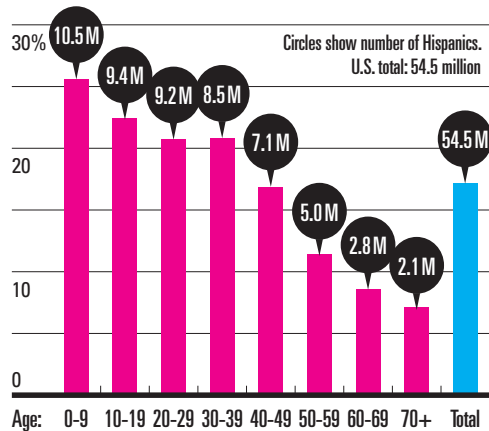
The Thomson Reuters/University of Michigan index rebounded in December 2013 as consumers voiced more confidence about the economic outlook. Consumer confidence had slumped in fall 2013 amid the federal government's shutdown. The index (82.5) is close to the six-year high hit in July 2013 (85.1).



Source: Thomson Reuters/University of Michigan Index of Consumer Sentiment. December 2013 (82.5) is preliminary reading. More info: <http://www.sca.isr.umich.edu>.

Hispanic population by age

Hispanics as percentage of U.S. population. Hispanics account for more than one-fifth of the U.S. population for every age up to 39.



Source: Census Bureau. Projections for July 2013 from national projections released in December 2012. Numbers rounded. More info: census.gov.

How Americans use leisure time

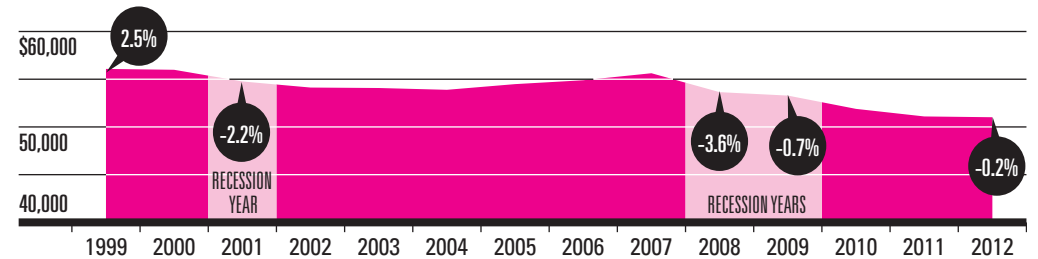
Americans age 15+ on average had 5.4 hours of leisure time per day in 2012. Watching TV is by far the nation's No. 1 leisure activity.

Age	AVERAGE LEISURE HOURS			AVERAGE WEEKDAY LEISURE HOURS SPENT ON...						
	All days	Weekdays	Weekends, 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	5.9	5.3	7.3	2.0	0.8	0.8	0.1	0.7	0.2	0.7
20-24	5.6	5.2	6.4	2.1	1.0	0.9	0.2	0.3	0.2	0.5
25-34	4.4	3.8	5.8	2.1	0.5	0.4	0.1	0.3	0.2	0.3
35-44	4.3	3.6	5.9	2.0	0.5	0.3	0.2	0.2	0.2	0.2
45-54	4.8	4.2	6.3	2.4	0.5	0.3	0.3	0.2	0.3	0.3
55-64	5.6	5.0	6.9	2.9	0.5	0.3	0.4	0.2	0.3	0.4
65-74	7.1	6.9	7.5	3.9	0.8	0.4	0.6	0.4	0.4	0.4
75+	7.7	7.5	8.0	4.3	0.7	0.4	0.9	0.3	0.6	0.4
15+	5.4	4.9	6.6	2.6	0.6	0.4	0.3	0.3	0.3	0.4
Men	5.8	5.2	7.3	2.7	0.6	0.5	0.3	0.4	0.3	0.4
Women	5.0	4.6	5.9	2.5	0.6	0.3	0.4	0.3	0.2	0.3

1. Including travel related to leisure and sports activities. Source: Bureau of Labor Statistics' 2012 American Time Use Survey. More info: bls.gov/tus.

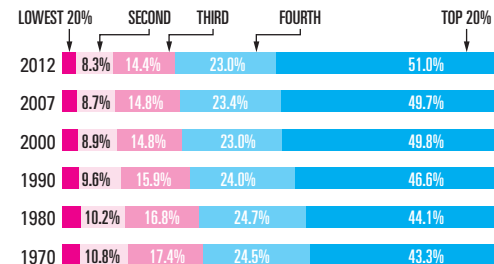
Median household income

Median household income in inflation-adjusted 2012 dollars. Real household income has fallen for the past five years. It peaked in 1999. Circles show percent change vs. previous year.



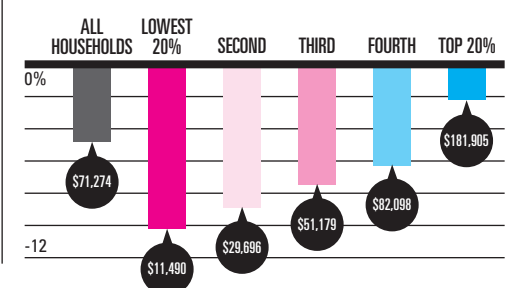
Income distribution among households rich to poor

Share of aggregate income received by different household-income quintiles. The richest 20% of households collected 51.0% of income in 2012.



Mean (average) income for households rich to poor

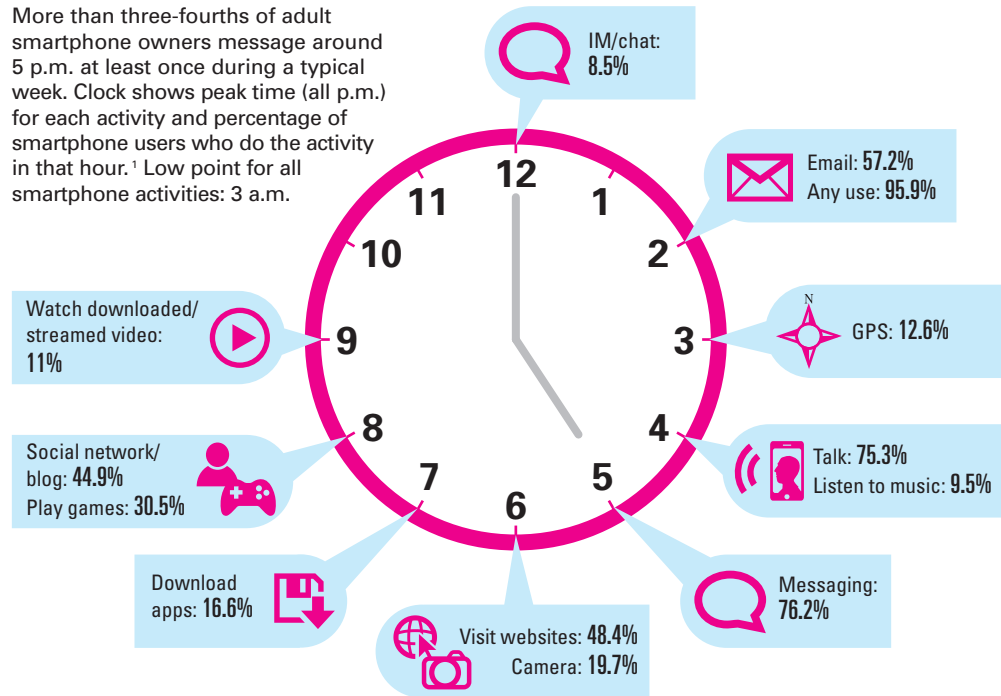
Mean income for household-income quintiles in 2012 and percent change vs. pre-recession 2007. The poorer the household, the sharper the drop.



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

When and how smartphone owners use their devices

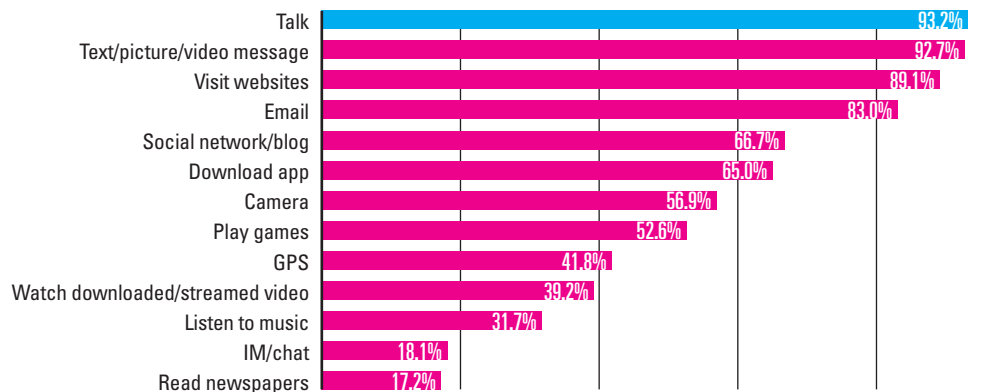
More than three-fourths of adult smartphone owners message around 5 p.m. at least once during a typical week. Clock shows peak time (all p.m.) for each activity and percentage of smartphone users who do the activity in that hour.¹ Low point for all smartphone activities: 3 a.m.



Source: Experian Marketing Services' Simmons Connect. Adult smartphone users, spring 2013. More info: experian.com/simmons-connect.
 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% of smartphone owners email at 2 p.m. at least once in a week; looking at specific days, 20% of smartphone owners email at 2 p.m. on a typical Monday, Tuesday and Friday, 21% at 2 p.m. Wednesday and Friday, 16% at 2 p.m. Saturday and 15% at 2 p.m. Sunday.

Most popular activities on smartphones

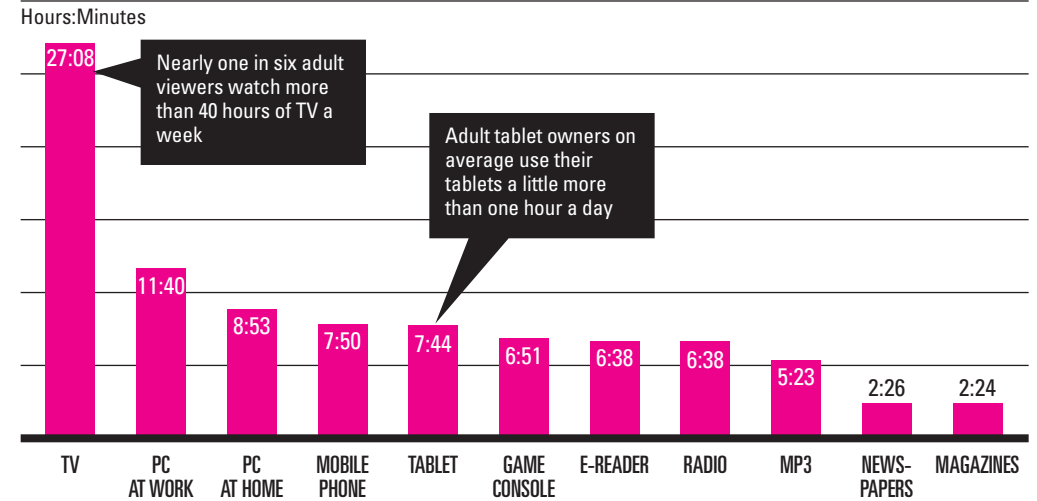
Talk barely tops messaging as the most common activity among adult smartphone owners.



Source: Experian Marketing Services' Simmons Connect. Adult smartphone owners who did these activities over a seven-day period, spring 2013. More info: experian.com/simmons-connect.

Time consumers spend with various devices and media

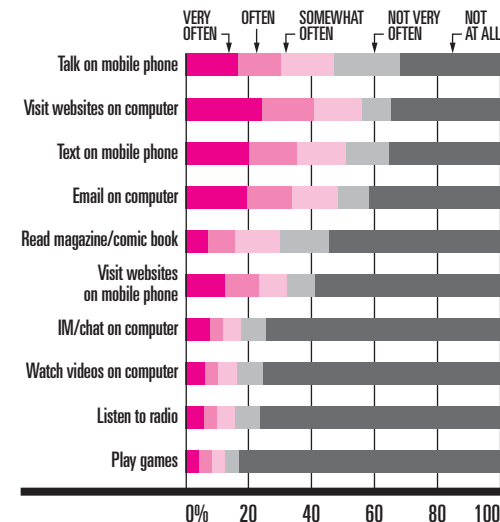
What adults do when they're left to their devices. Average time spent by users over seven days.



Source: Experian Marketing Services' Simmons Connect. Amount of time spent over a seven-day period, spring 2013, for adults who own this device or use this medium. More info: experian.com/simmons-connect.

How TV viewers are multitasking

Percentage of adults who do these activities while watching TV. About two-thirds of TV viewers talk or text on a mobile phone or surf the web on a computer.



Source: Experian Marketing Services' Simmons Connect. Results based on adult survey participants who answered question (and so results exclude non-responses), spring 2013. More info: experian.com/simmons-connect.

Most popular activities on tablets

Surfing the web is the most common activity among adult tablet owners.

Activity	% of tablet owners doing this
Visit websites	84.3%
Email	71.5%
Download app	64.1%
Play games	56.3%
Social network/blog	54.6%
Watch downloaded/streamed video	36.4%
Text/picture/video message	18.9%
Camera	17.1%
Listen to music	16.3%
GPS	12.4%
Read newspapers	10.3%
IM/chat	5.4%

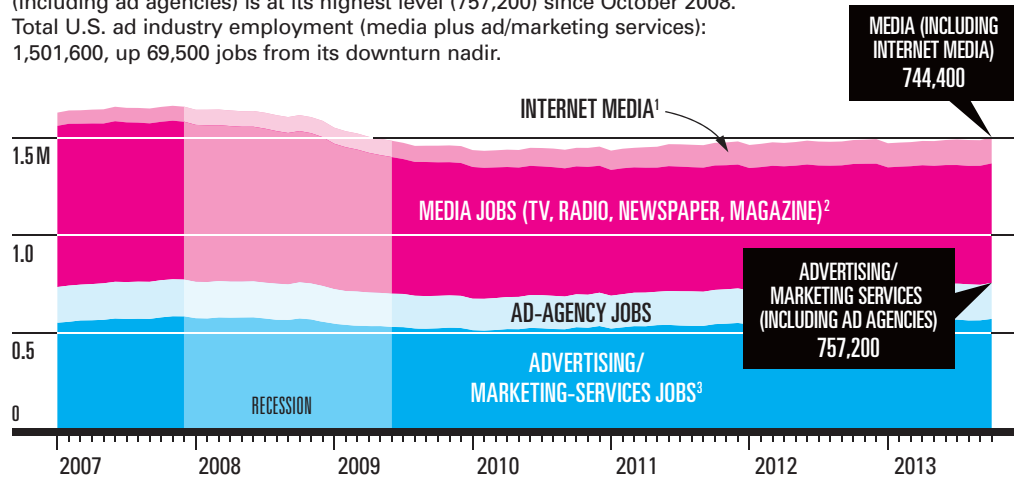
Source: Experian Marketing Services' Simmons Connect. Adult tablet owners who did these activities over a seven-day period, spring 2013. More info: experian.com/simmons-connect.

JOBS



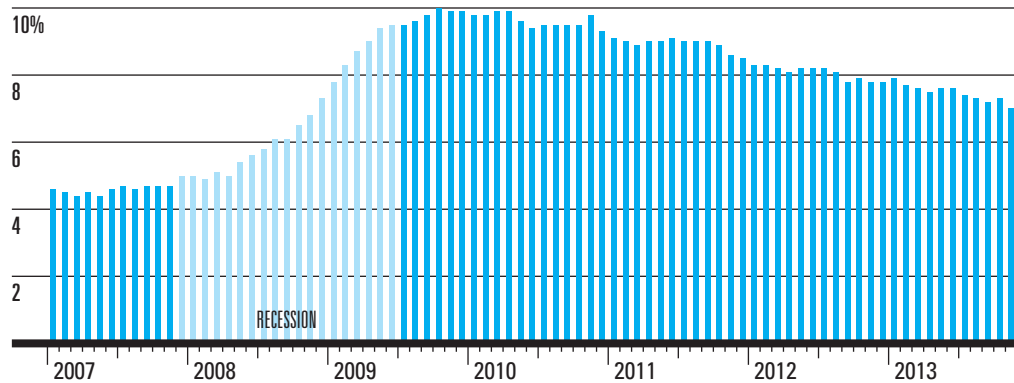
U.S. ad industry employment

U.S. internet-media employment is at a record high (133,800). But overall media employment (744,400) is down 142,200 jobs from its level before the 2007-2009 recession. Ad-agency staffing (183,700) is near its highest point since 2008. Overall ad/marketing-services employment (including ad agencies) is at its highest level (757,200) since October 2008. Total U.S. ad industry employment (media plus ad/marketing services): 1,501,600, up 69,500 jobs from its downturn nadir.



U.S. unemployment rate

The U.S. unemployment rate (7.0% in November 2013) has fallen from its downturn peak (10.0% in October 2009) and is at its lowest level since November 2008. The jobless rate is still far above pre-recession 2007 (4.7% in November 2007).



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

Top: Data through October 2013. 1. Internet-media businesses and web-search portals. 2. Excludes internet-media businesses and web-search portals (shown separately in graphic). 3. Includes media, direct and PR agencies; graphic design; marketing consultants; market research; and other ad/marketing services. Excludes ad-agency jobs (shown separately in graphic). Recession dates: Great Recession started in December 2007 and ended in June 2009.



“That’s so
0.2 seconds
ago.”

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**“2,349,726
Brad Smiths.
So what?”**

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