

Ad Age

10.2%
Worldwide forecast for
2021 advertising growth,
after 4.1% drop in 2020

58%
Projected internet share
of 2021 U.S. advertising.
Internet spending will be
double the level of 2016

MARKETING FACT PACK 2021

291,300
U.S. internet media
employment, double
the level of early 2013

\$11 billion
Amazon's worldwide
ad and promotion
spending, vaulting it
to No. 1 spot

CRAIN

THE BIG LIST

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

2020 is (finally) over. The pandemic upended markets, forcing a business transformation in real time. Some sectors are in a deep hole; many businesses won't recover.

The pandemic isn't over. Lives have been lost. Many are still suffering. But there is reason for hope in 2021.

The economic tumult from the coronavirus pandemic

and accompanying recession turned out to be less depressing, and Depression-like, than many people feared in early 2020.

The economy is growing. U.S. and global ad spending, powered by digital, is recovering. WPP's GroupM expects worldwide advertising to break a new record in 2021.

1. Amazon

\$11 BILLION

World's biggest advertiser.
2019 ad and promotion spending

2. Amazon

\$6.9 BILLION

Nation's biggest advertiser. 2019 estimated
U.S. ad and promotion spending

3. Billion-dollar global spenders

114

Marketers with 2019 worldwide ad spending
greater than \$1 billion

4. Billion-dollar U.S. spenders

47

Marketers with 2019 U.S. ad spending
greater than \$1 billion

5. 2020 advertising

\$591 BILLION, -4.1%

World forecast

6. 2021 advertising

\$651 BILLION, +10.2%

World forecast

\$229 BILLION, -5.4%

U.S. forecast

\$237 BILLION, +3.2%

U.S. forecast

7. Google

266 MILLION

Biggest U.S. digital media property.
Unique visitors in September 2020
(all Google sites)

8. TV

2.6

Hours per weekday spent watching
TV in 2019, Americans age 15+

9. WPP

\$16.9 BILLION

World's biggest agency company.
2019 revenue

10. Accenture Interactive

\$10.3 BILLION

World's biggest digital network.
2019 revenue

The Big List ²

10 key stats

Amazon is the biggest U.S. and global advertiser

Marketers ⁴

2021 advertising forecasts

Worldwide and U.S.

Biggest advertisers

Worldwide and U.S.

Most-advertised brands

U.S., based on measured media

U.S. market leaders

Ad spending and share figures

Media ¹³

Share of U.S. ad spending by medium

Including mobile's share of internet ad spending

Digital media platforms and properties

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

Biggest TV networks and programs

Ad spending and audience ratings

Cost for a 30-second commercial

Football is priciest spot for ads

Agencies ¹⁹

World's biggest agency companies and networks

WPP is largest company. Accenture Interactive tops the network chart

Biggest agency ventures by category

Companies, networks and agencies

Digital's share of agency revenue

Digital accounted for 54% of agencies' 2019 U.S. revenue

U.S. agency growth rates

Revenue for U.S. agencies from all disciplines edged up 1.2 percent in 2019

Jobs ²³

U.S. ad agency and internet media employment

Ad agency employment during 2020 slumped to its lowest level since 2015

Media employment

Internet media ventures account for 41% of media employment

Consumers ²⁴

Population and consumer confidence

Demographics and consumer sentiment

How consumers watch TV

Multitasking. Cord-cutters. Binge-watching

Ad Age Marketing Fact Pack 2021

Produced by Ad Age Datacenter. Published as digital edition December 21, 2020

Available for download at [AdAge.com/resources](https://adage.com/resources)

Subscribe to Ad Age Datacenter

[AdAge.com/getdatacenter](https://adage.com/getdatacenter)
Get exclusive access to expanded content including:

Ad Age World's Largest Advertisers
Rankings. Database (profiles, agency rosters, executives, spending)
[AdAge.com/globalmarketers2020](https://adage.com/globalmarketers2020)

Ad Age Leading National Advertisers
Rankings. Database (profiles, brands, agency rosters, executives, spending)
[AdAge.com/lna2020](https://adage.com/lna2020)
[AdAge.com/marketertrees2020](https://adage.com/marketertrees2020)

Ad Age Agency Report
Rankings. Database (companies, networks, agencies)
[AdAge.com/agencyreport2020](https://adage.com/agencyreport2020)
[AdAge.com/agencyfamilytrees2020](https://adage.com/agencyfamilytrees2020)

Staff

Datacenter directors:
Bradley Johnson, Kevin Brown
Senior research editor: **Catherine Wolf**
Senior art director: **Jennifer Chiu**
Datacenter@adage.com

Joshua J. Golden
President & Publisher
jgolden@adage.com

James Palma
GM Revenue, Client Partnerships
jpalma@adage.com



© Copyright 2020 Crain Communications Inc. The data and information presented is the property of Crain and others and is protected by copyright and other intellectual property laws. For personal, noncommercial use only, which must be in accordance with Ad Age's Terms and Conditions at [AdAge.com/terms](https://adage.com/terms). Archiving, reproduction, redistribution or other uses are prohibited.

MARKETERS

GroupM's 2021 worldwide media ad revenue forecast

Estimated worldwide advertising revenue for media owners. Table shows advertising including U.S. political ads (top half) and excluding political ads (bottom half). Including political ads, GroupM expects global advertising to grow 10.2% to a record \$651 billion in 2021 after falling 4.1% in 2020 (a decline mitigated by the U.S. election ads windfall).

	Media ad revenue (dollars in billions)			Year-to-year percent change		
	2021	2020	2019	2021 vs. 2020	2020 vs. 2019	2019 vs. 2018
Media (including U.S. political advertising)						
Digital (pure play)	\$396.6	\$347.6	\$317.7	14.1%	9.4%	21.2%
TV	147.2	142.8	160.7	3.1	-11.2	-3.2
Audio	26.0	24.0	31.4	8.3	-23.7	-0.1
Outdoor and cinema	33.5	28.0	41.7	19.6	-32.8	-0.1
Magazine	16.3	16.9	21.7	-3.7	-22.1	-8.3
Newspaper	31.5	31.3	42.5	0.8	-26.3	-8.6
Total: Media	\$651.1	\$590.6	\$615.8	10.2%	-4.1%	7.8%
Media (excluding U.S. political advertising)						
Digital (pure play)	\$395.9	\$343.1	\$316.9	15.4%	8.2%	21.7%
TV	146.4	135.8	160.0	7.8	-15.1	-1.1
Audio	25.7	23.7	31.2	8.7	-24.1	0.5
Outdoor and cinema	33.4	27.7	41.6	20.7	-33.5	0.2
Magazine	16.3	16.8	21.7	-3.0	-22.8	-7.9
Newspaper	31.5	31.0	42.4	1.3	-26.7	-8.2
Total: Media	\$649.2	\$578.1	\$613.9	12.3%	-5.8%	8.7%

World's five largest ad markets from GroupM

Ranked by 2021 estimated advertising revenue for media owners.

Rank	Market	Media ad revenue (dollars in billions)	Year-to-year percent change	2021 share of world
		2021	2021 vs. 2020	
1	U.S.*	\$227.8	6.0%	35.0%
2	China	145.7	15.6	22.4
3	Japan	38.4	12.0	5.9
4	U.K.	30.5	12.4	4.7
5	Germany	24.5	4.6	3.8
	Rest of world	184.4	11.7	28.3
	Total: Media	\$651.1	10.2%	100.0%

Source: WPP's GroupM (This Year Next Year, Global End-of-Year Forecast, December 2020). Numbers rounded. Figures for traditional media (for example, TV and newspaper) include their digital extensions. Digital (pure play) includes only pure-play digital media (for example, Facebook and Google). Ad spending in constant currency, which factors out currency movements; not adjusted for inflation. *Including political advertising. More info: groupm.com.

Zenith's 2021 U.S. media and marketing-services spending forecast: \$487 billion

Estimated U.S. spending in media and marketing services. Zenith forecasts media ad spending will grow 3.2% in 2021 after falling 5.4% in 2020 amid the coronavirus pandemic and recession.

	Spending (dollars in billions)			Year-to-year percent change		
	2021	2020	2019	2021 vs. 2020	2020 vs. 2019	2019 vs. 2018
Media						
Internet	\$136.3	\$124.3	\$120.2	9.6%	3.5%	15.4%
TV	58.9	61.4	67.2	-4.0	-8.7	-1.4
Radio	15.2	15.2	17.6	0.1	-13.6	0.0
Outdoor and cinema	9.8	8.8	10.9	11.9	-19.0	2.9
Magazine	8.8	9.8	12.8	-10.0	-23.6	-9.4
Newspaper	7.7	10.0	13.9	-23.0	-28.0	-8.0
Total: Media	236.7	229.5	242.5	3.2	-5.4	5.6
Marketing services						
Sales promotion	88.2	86.7	85.2	1.7	1.8	3.0
Telemarketing	61.4	61.4	60.8	0.0	1.0	2.0
Event sponsorship	47.8	45.3	42.7	5.5	6.0	7.0
Direct mail	39.1	37.2	45.9	5.0	-19.0	-3.7
Directories	7.6	7.8	7.9	-2.5	-2.0	-1.0
Public relations	6.6	6.3	6.0	4.0	5.0	6.0
Total: Marketing services	250.6	244.7	248.6	2.4	-1.6	2.0
Total: Media and marketing services	\$487.3	\$474.2	\$491.1	2.8%	-3.4%	3.8%

Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2020) based on current prices. Numbers rounded. Internet includes all internet advertising (including media owned by pure-play digital firms and digital extensions of traditional media such as a newspaper's website). More info: zenithmedia.com.

U.S. measured-media spending by medium in 2019

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

Medium	Measured-media spending		
	All advertisers (including 200 LNA)	200 Leading National Advertisers	200 LNA's share
TV	\$74.1	\$46.0	62%
Magazine	12.5	5.5	44
Newspaper	7.0	1.1	15
Radio	7.1	2.9	40
Outdoor	5.6	1.5	27
Subtotal	106.3	56.9	54
Desktop search	24.4	8.3	34
Desktop internet display	11.7	3.0	25
Subtotal including search and display	142.4	68.1	48
Other digital	26.8	NA	NA
Free-standing inserts	NA	0.6	NA
Cinema	0.6	NA	NA
Total	\$169.9	\$68.7	NA

From Ad Age Leading National Advertisers 2020 (July 13, 2020). Full report: AdAge.com/lna2020. Marketer database: AdAge.com/marketerstrees2020. About LNA 2020: AdAge.com/aboutlna2020.

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

Kantar restated national TV, digital display and desktop search data for 2018 and 2019. The digital display restatement included desktop banner, desktop video and mobile banner media. Measured-media data shown here may not be

comparable with figures published in Ad Age Leading National Advertisers 2019 (June 2019) and Ad Age Marketing Fact Pack 2020 (December 2019).

TV: Broadcast network TV, cable TV networks, spot, syndicated; includes Spanish-language networks. Magazine: Consumer, Sunday, business-to-business and local magazines; includes Spanish-language magazines. Newspaper: National and local newspapers; includes Spanish-language newspapers. Radio: Network, national spot and local. Other digital: Paid social media, mobile web and online video.

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

Ranked by 2019 total worldwide advertising spending. Dollars in billions.

Rank	Marketer	Headquarters	2019 total worldwide advertising spending
1	Amazon	U.S.	\$11.0
2	Procter & Gamble Co.	U.S.	10.7
3	L'Oréal	France	10.3
4	Samsung Electronics Co.	South Korea	9.7
5	Unilever	U.K.	8.1
6	Comcast Corp.	U.S.	7.6
7	Nestlé	Switzerland	7.4
8	LVMH Moët Hennessy Louis Vuitton	France	7.0
9	Alphabet (Google)	U.S.	6.8
10	AT&T	U.S.	6.1
11	Anheuser-Busch InBev	Belgium	5.8
12	Volkswagen	Germany	5.7
13	Booking Holdings	U.S.	5.0
14	Walt Disney Co.	U.S.	4.8
15	Alibaba Group Holding	China	4.4
16	Toyota Motor Corp.	Japan	4.3
17	Coca-Cola Co.	U.S.	4.2
18	McDonald's Corp.	U.S.	4.0
19	American Express Co.	U.S.	4.0
20	Expedia Group	U.S.	3.8
21	General Motors Co.	U.S.	3.7
21	Walmart	U.S.	3.7
23	Ford Motor Co.	U.S.	3.6
24	Nike	U.S.	3.6
25	JPMorgan Chase & Co.	U.S.	3.6
Ad Age World's Largest Advertisers: Top 25			\$149.1B

From Ad Age World's Largest Advertisers (Dec. 7, 2020). Full report including ranking of top 100, profiles and expanded footnotes: [AdAge.com/globalmarketers2020](https://adage.com/globalmarketers2020).

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

© Copyright 2020 Crain Communications Inc.; see p. 3.

1. Amazon: Advertising and promotion spending.
2. Procter & Gamble Co.: Estimated spending on advertising plus other marketing costs. Year ended June 2020.
3. L'Oréal: Advertising and promotion spending.
4. Samsung Electronics Co.: Advertising and sales promotion spending.
5. Unilever: Brand and marketing investment costs.

6. Comcast Corp.: Advertising, marketing and promotion spending.
7. Nestlé: Estimated "consumer facing" marketing expenses.
8. LVMH Moët Hennessy Louis Vuitton: Advertising and promotion spending.
9. Alphabet (Google): Advertising and promotion spending.
10. Booking Holdings: Marketing expenses.
11. Walt Disney Co.: Estimated pro forma ad spending including 21st Century Fox (acquired March 2019). Year ended September 2019.
12. Alibaba Group Holding: Advertising and promotion spending. Year ended March 2020.
13. McDonald's Corp.: Estimated worldwide systemwide ad spending including spending from franchisees and company-owned restaurants.
14. American Express Co.: Estimated marketing and promotion expenses.
15. General Motors Co.: Advertising and promotion spending.
16. Nike: Advertising and promotion spending. Year ended May 2020.
17. JPMorgan Chase & Co.: Marketing expenses.

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

Ranked by 2019 total U.S. advertising spending. Dollars in millions.

Rank	Marketer	Headquarters	2019 total U.S. advertising spending	2019 U.S. measured-media spending
1	Amazon	Seattle	\$6,879	\$1,843
2	Comcast Corp.	Philadelphia	6,142	1,620
3	AT&T	Dallas	5,484	1,647
4	Procter & Gamble Co.	Cincinnati	4,281	2,784
5	Walt Disney Co.	Burbank, Calif.	3,154	1,147
6	Alphabet (Google)	Mountain View, Calif.	3,130	619
7	Verizon Communications	New York	3,071	952
8	Charter Communications	Stamford, Conn.	3,044	353
9	American Express Co.	New York	2,990	237
10	General Motors Co.	Detroit	2,952	1,372
11	JPMorgan Chase & Co.	New York	2,787	288
12	Walmart	Bentonville, Ark.	2,753	594
13	L'Oréal	Clichy, France	2,348	1,160
14	Deutsche Telekom (T-Mobile US)	Bellevue, Wash.	2,346	1,767
15	Berkshire Hathaway	Omaha, Neb.	2,329	1,966
16	Nestlé	Vevey, Switzerland	2,314	655
17	Ford Motor Co.	Dearborn, Mich.	2,280	736
18	Expedia Group	Seattle	2,173	1,148
19	Capital One Financial Corp.	McLean, Va.	2,160	633
20	Fiat Chrysler Automobiles	London	2,053	621
21	Samsung Electronics Co.	Suwon, South Korea	1,977	512
22	Pfizer	New York	1,899	709
23	Progressive Corp.	Mayfield Village, Ohio	1,837	1,067
24	PepsiCo	Purchase, N.Y.	1,726	935
25	Bank of America Corp.	Charlotte, N.C.	1,722	295
Ad Age Leading National Advertisers: Top 25			\$73.8B	\$25.7B

From Ad Age Leading National Advertisers 2020 (July 13, 2020).
Full report: [AdAge.com/lina2020](https://www.adage.com/lina2020). Marketer database:
[AdAge.com/marketerstrees2020](https://www.adage.com/marketerstrees2020). About LNA 2020: [AdAge.com/aboutlina2020](https://www.adage.com/aboutlina2020).

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

© Copyright 2020 Crain Communications Inc.; see p. 3.

1. Amazon: Estimated advertising and promotion spending.
2. Comcast Corp.: Estimated advertising, marketing and promotion spending.
3. Procter & Gamble Co.: Estimated spending on advertising plus other marketing costs. Year ended June 2019.
4. Procter & Gamble Co.: Estimated spending on advertising plus other marketing costs. Year ended June 2019.
5. Walt Disney Co.: Estimated pro forma ad spending including 21st Century Fox (acquired March 2019). Year ended September 2019.

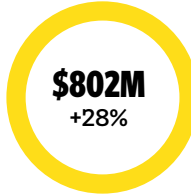
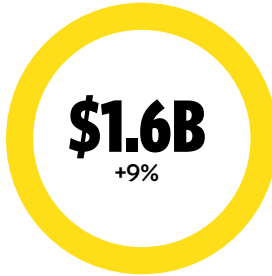
6. Alphabet (Google): Estimated advertising and promotion spending.
7. Charter Communications: Marketing expenses.
8. Charter Communications: Marketing expenses.
9. American Express Co.: Estimated marketing and promotion expenses.
10. General Motors Co.: Estimated advertising and promotion spending.
11. JPMorgan Chase & Co.: Estimated marketing expenses.
12. L'Oréal: Estimated advertising and promotion spending.
13. L'Oréal: Estimated advertising and promotion spending.
14. T-Mobile US: Estimated pro forma ad spending including Sprint Corp. (acquired in April 2020) and excluding Boost Mobile (sold in July 2020).
15. Berkshire Hathaway: Estimated U.S. ad spending.
16. Nestlé: Estimated "consumer facing" marketing expenses.
17. Capital One Financial Corp.: Estimated marketing expenses.
18. Fiat Chrysler Automobiles: Estimated ad spending. FCA and PSA Group in October 2019 announced plan to merge, forming Stellantis.
19. Fiat Chrysler Automobiles: Estimated ad spending. FCA and PSA Group in October 2019 announced plan to merge, forming Stellantis.
20. Fiat Chrysler Automobiles: Estimated ad spending. FCA and PSA Group in October 2019 announced plan to merge, forming Stellantis.
21. Samsung Electronics Co.: Estimated advertising and sales promotion spending.
22. Samsung Electronics Co.: Estimated advertising and sales promotion spending.
23. Bank of America Corp.: Estimated marketing expenses.

10 most-advertised brands

Ranked by 2019 U.S. measured-media spending, Geico was the most-advertised brand for the fourth year in a row. Amazon's measured spending surged 34% in 2019.

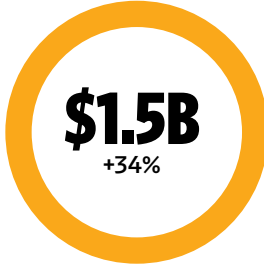
More in Ad Age Datacenter
Marketers database:
Profiles, agency rosters
[AdAge.com/marketertrees2020](https://www.adage.com/marketertrees2020)

1. Geico
Berkshire Hathaway



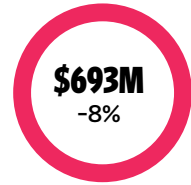
6. State Farm
State Farm Mutual
Auto Insurance Co.

2. Amazon
Amazon



7. T-Mobile
Deutsche Telekom
(T-Mobile US)

3. Progressive
Progressive Corp.



8. Chevrolet
General Motors Co.

4. Verizon
Verizon Communications



9. Capital One
Capital One Financial Corp.

5. AT&T
AT&T



10. Apple
Apple

From Ad Age Leading National Advertisers 2020 (July 13, 2020). See ranking of nation's 200 most-advertised brands: [AdAge.com/lna2020](https://www.adage.com/lna2020).

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

Ad Age U.S. market leaders by category

2019 share and ad spending breakouts for marketers and brands. Dollars in millions.

Auto marketers

2019 U.S. market share for auto/light-truck marketers.

	Marketer	Market share	Total U.S. ad spending
1	General Motors Co.	16.9%	\$2,952
2	Ford Motor Co.	14.1	2,280
3	Toyota Motor Corp.	13.9	1,508
4	Fiat Chrysler Automobiles	12.9	2,053
5	Honda Motor Co.	9.4	1,390
6	Nissan Motor Co.	7.9	990
7	Hyundai Motor Co.	4.2	627
8	Subaru Corp.	4.1	523
9	Volkswagen	3.8	777
10	Kia Motors Corp.	3.6	534
Top 10		90.7	\$13,633
Industry total (*vehicles sold in millions)		17.1*	NA

Retailers

Ranking based on 2019 total U.S. ad spending.

	Marketer	Share of U.S. retail sales	Total U.S. ad spending
1	Amazon	3.9%	\$6,879
2	Walmart	10.7	2,753
3	Target Corp.	2.1	1,647
4	Macy's	0.7	1,330
5	Kohl's Corp.	0.5	1,156
6	Home Depot	2.7	1,090
7	Wayfair	0.2	932
8	Kroger Co.	3.3	854
9	Lowe's Cos.	1.8	811
10	Best Buy Co.	1.1	772
Top 10		27.1	\$18,224
Industry total (*U.S. sales, dollars in trillions)		\$3.7*	NA

Auto brands

2019 U.S. market share for auto/light-truck brands.

	Brand/marketer	Market share	Measured media
1	Ford Ford Motor Co.	13.4%	\$520
2	Toyota Toyota Motor Corp.	12.2	522
3	Chevrolet General Motors Co.	11.5	693
4	Honda Honda Motor Co.	8.5	284
5	Nissan Nissan Motor Co.	7.2	503
6	Jeep Fiat Chrysler Automobiles	5.4	287
7	Ram Fiat Chrysler Automobiles	4.1	191
8	Subaru Subaru Corp.	4.1	322
9	Hyundai Hyundai Motor Co.	4.0	311
10	Kia Kia Motors Corp.	3.6	279
Top 10		73.9	3,913
Industry total (*vehicles sold in millions)		17.1*	\$6,493

Restaurant chains

2019 U.S. market share based on systemwide sales.

	Chain/marketer	Market share	Measured media
1	McDonald's McDonald's Corp.	7.0%	\$624
2	Starbucks Starbucks Corp.	3.7	72
3	Chick-fil-A Chick-fil-A	2.0	130
4	Taco Bell Yum Brands	2.0	383
5	Burger King Restaurant Brands International	1.8	372
6	Subway Doctor's Associates	1.8	219
7	Wendy's Wendy's Co.	1.7	256
8	Dunkin' Dunkin' Brands Group	1.6	176
9	Domino's Domino's Pizza	1.2	467
10	Panera Bread Pret Panera Holding Co.	1.0	70
Top 10		23.7	2,768
Industry total (*U.S. sales, dollars in billions)		\$578*	\$6,162

From Ad Age Leading National Advertisers 2020 Fact Pack (July 13, 2020). Numbers rounded. Expanded footnotes and source information available in that Fact Pack at [AdAge.com/resources](https://www.adage.com/resources). Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar. More info: [kantar.com/media](https://www.kantar.com/media). About LNA 2020: [AdAge.com/aboutlna2020](https://www.adage.com/aboutlna2020).

Auto marketers, auto brands: Market share calculations by Ad Age Datacenter based on sales figures from Automotive News Data Center. More info: [autonews.com](https://www.autonews.com). **Retailers:** Census Bureau (U.S. retail sales). More info: [census.gov](https://www.census.gov). Amazon: Share is Ad Age Datacenter estimate. **Restaurant chains:** Technomic 2020 Top 500 Chain Restaurant Report (sales used to calculate market share). More info: [technomic.com](https://www.technomic.com). Systemwide sales is franchised plus company-owned restaurants. Chick-fil-A, Panera Bread and Starbucks based on estimated sales. Inspire Brands in October 2020 signed a deal to buy Dunkin' Brands. Pret Panera Holding Co. is owned by JAB Holding Co.

Ad Age U.S. market leaders by category

2019 share and ad spending breakouts for marketers and brands. Dollars in millions.

Personal care brands

2019 U.S. market share.

	Brand/marketer	Market share	Measured media
1	Dove Unilever	3.1%	\$197
2	Bath & Body Works L Brands	2.7	2
3	L'Oréal Paris L'Oréal	2.4	495
4	Equate Walmart	2.3	0
5	Crest Procter & Gamble Co.	2.2	117
6	Gillette Procter & Gamble Co.	2.1	115
7	Colgate Colgate-Palmolive Co.	2.1	108
8	Neutrogena Johnson & Johnson	1.7	196
9	Oral-B Procter & Gamble Co.	1.4	40
10	Suave Unilever	1.3	30
Top 10		21.4	1,300
Total personal care measured-media spending		100.0%	\$5,076

Household product brands

2019 U.S. market share.

	Brand/marketer	Market share	Measured media
1	Great Value Walmart	5.0%	\$0
2	Tide Procter & Gamble Co.	4.4	197
3	Charmin Procter & Gamble Co.	3.7	112
4	Kirkland Signature Costco Wholesale Corp.	3.1	0
5	Bounty Procter & Gamble Co.	3.0	136
6	Member's Mark Walmart (Sam's Club)	2.8	0
7	Gain Procter & Gamble Co.	2.4	97
8	Scott Kimberly-Clark Corp.	2.4	3
9	Clorox Clorox Co.	2.2	80
10	Downy Procter & Gamble Co.	2.1	160
Top 10		31.1	786
Total household product measured-media spending		100.0%	\$2,084

Prescription drug brands

Share of 2019 U.S. prescription drug measured-media spending.

	Brand/marketer	Share of ad spend	Measured media
1	Humira AbbVie	8.7%	\$556
2	Xeljanz Pfizer	3.4	214
3	Dupixent Sanofi	3.3	210
4	Chantix Pfizer	3.1	195
5	Ozempic Novo Nordisk	2.8	180
6	Eliquis Bristol-Myers Squibb Co.	2.7	174
7	Emgality Eli Lilly & Co.	2.7	169
8	Otezla Amgen	2.6	168
9	Trulicity Eli Lilly & Co.	2.5	161
10	Cosentyx Novartis	2.5	159
Top 10		34.3	2,186
Total prescription drug measured-media spending		100.0%	\$6,368

Wireless services

2019 U.S. market share for wireless service providers.

	Marketer	Market share	Measured media
1	Verizon Communications	33.4%	\$612
2	Deutsche Telekom (T-Mobile US plus Sprint Corp., including Boost Mobile and Sprint prepaid)	29.4	1,684
	T-Mobile US	18.1	1,012
	Sprint Corp. (Sprint)	8.7	458
	Sprint Corp. (Boost Mobile, Sprint prepaid)	2.6	214
3	AT&T	28.2	624
4	América Móvil (TracFone Wireless)	6.4	227
5	Telephone and Data Systems (U.S. Cellular)	1.4	41
Top 5		98.9	3,187
Total wireless services measured-media spending		100.0%	\$4,457

Personal care brands, household product brands: U.S. market share from Numerator. More info: numerator.com.

Prescription drug brands: Ad Age Datacenter analysis of U.S. measured-media spending.

Wireless services: U.S. network operator market share from Comscore MobiLens, three months ended December 2019. More info: comscore.com. Ad spending for companies' wireless services. Total wireless services spending includes ad spending by major phone suppliers. T-Mobile in April 2020 bought Sprint Corp.; T-Mobile in July 2020 sold Sprint's Boost Mobile and Sprint prepaid business to Dish Network Corp. Verizon in September 2020 signed a deal to buy TracFone Wireless.

From Ad Age Leading National Advertisers 2020 Fact Pack (July 13, 2020). Numbers rounded. Expanded footnotes and source information available in that Fact Pack at AdAge.com/resources. Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar. More info: kantar.com/media. About LNA 2020: AdAge.com/aboutlna2020.

© Copyright 2020 Crain Communications Inc.; see p. 3.

Insurance brands

Share of 2019 U.S. insurance industry measured-media spending.

	Brand/marketer	Share of ad spend	Measured media
1	Geico Berkshire Hathaway	20.8%	\$1,618
2	Progressive Progressive Corp.	13.7	1,067
3	State Farm State Farm Mutual Auto Insurance Co.	10.3	802
4	Allstate Allstate Corp.	5.6	437
5	Liberty Mutual Liberty Mutual Insurance Co.	5.6	435
6	USAA United Services Automobile Association	3.4	264
7	UnitedHealthcare UnitedHealth Group	2.9	225
8	The General American Family Mutual Insurance Co.	1.9	151
9	Farmers Insurance Zurich Insurance Group	1.6	126
10	Nationwide Nationwide Mutual Insurance Co.	1.5	117
Top 10		67.3	5,240
Total insurance industry measured-media spending		100.0%	\$7,790

Beer marketers

2019 U.S. market share based on shipment volume.

	Marketer	Market share	Measured media
1	Anheuser-Busch InBev (Budweiser)	39.7%	\$428
2	Molson Coors Beverage Co. (Coors, Miller)	22.3	218
3	Constellation Brands (Modelo, Corona)	10.9	359
4	Heineken	3.4	138
5	Boston Beer Co. (Samuel Adams)	2.6	58
6	Mark Anthony Group (Mike's Hard Lemonade)	2.5	9
7	Pabst Brewing Co.	1.8	0
8	Diageo (Guinness)	1.3	17
9	D.G. Yuengling & Son	1.2	9
10	Florida Ice and Farm Co. (Genesee, Labatt)	1.1	0
Top 10		86.9	1,237
Industry total (*barrels in millions)		206.2*	\$1,290

Credit cards

2019 U.S. market share based on card purchase volume.

	Marketer	Market share	Measured media
1	JPMorgan Chase & Co. (Chase)	20.4%	\$81
2	American Express Co.	20.2	177
3	Citigroup (Citibank)	11.2	82
4	Bank of America Corp.	9.6	11
5	Capital One Financial Corp.	9.3	402
6	U.S. Bancorp (U.S. Bank)	3.9	0
7	Discover Financial Services	3.7	271
8	Wells Fargo & Co.	3.5	3
9	Barclays	2.1	16
10	Synchrony Financial	1.4	3
Top 10		85.4	1,047
Industry total (*purchase volume, dollars in trillions)		\$4.0*	\$1,394

Beverage brands

2019 U.S. market share based on sales volume.

	Brand/marketer	Market share	Measured media
1	Coke Coca-Cola Co.	11.5%	\$283
2	Pepsi PepsiCo	4.9	224
3	Mountain Dew PepsiCo	3.5	119
4	Dr Pepper Keurig Dr Pepper	3.4	91
5	Gatorade PepsiCo	3.4	134
6	Sprite Coca-Cola Co.	2.8	32
7	Nestlé Pure Life Nestlé	2.7	10
8	Poland Spring Nestlé	2.4	8
9	Dasani Coca-Cola Co.	2.0	0
10	Aquafina PepsiCo	1.7	0
Top 10		38.4	901
Industry total (*gallons in billions)		34.3*	\$1,812

From Ad Age Leading National Advertisers 2020 Fact Pack (July 13, 2020). Numbers rounded. Expanded footnotes and source information available in that Fact Pack at [AdAge.com/resources](https://www.adage.com/resources). Source: Total U.S. ad spending from Ad Age Datascenter. U.S. measured-media spending from Kantar. More info: [kantar.com/media](https://www.kantar.com/media). About LNA 2020: [AdAge.com/aboutlna2020](https://www.adage.com/aboutlna2020).

© Copyright 2020 Crain Communications Inc., see p. 3.

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

Consumer spending by race and ethnicity

As percent of U.S. consumer spending at a given marketer. Table shows top 10 marketers by share of U.S. market in three categories. White consumers account for about 65% of spending at McDonald's. Black consumers account for about 30% of spending at Restaurant Brands International's Popeyes.

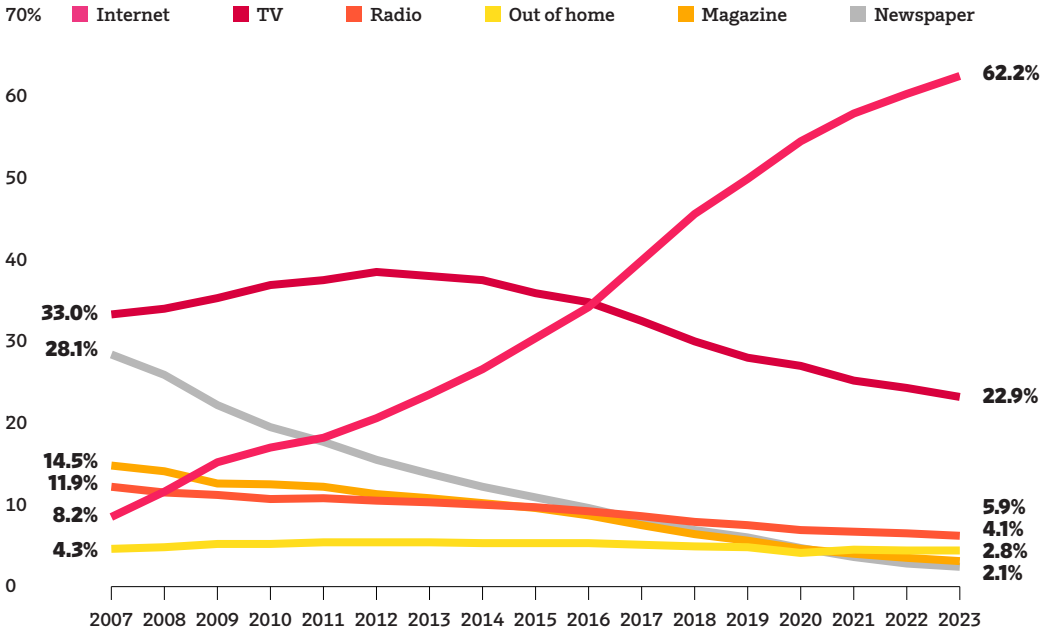
Category/marketer	Asian	African American	Hispanic	Other	White
Quick service restaurants					
McDonald's	5.2%	12.0%	16.0%	1.9%	64.9%
Chick-fil-A	4.2	15.7	12.7	1.5	65.9
Taco Bell	4.8	10.6	13.5	2.1	69.0
Wendy's	3.6	15.4	12.2	1.7	67.1
Subway	4.7	12.1	12.6	1.7	68.9
Burger King	4.3	15.2	14.1	1.9	64.6
Starbucks	10.7	10.0	17.2	2.5	59.7
Sonic	1.8	12.0	10.3	1.5	74.4
Popeyes	9.8	29.9	15.7	2.4	42.2
Arby's	2.2	7.2	4.5	1.3	84.8
Retail					
Walmart	3.2%	10.6%	10.9%	1.6%	73.8%
Amazon	6.3	9.2	10.1	1.4	73.0
Kroger	4.3	10.4	8.8	1.7	74.8
Costco	18.5	5.3	14.5	2.2	59.5
Target	8.2	8.9	14.5	1.6	66.7
Home Depot	5.5	8.5	15.3	1.8	69.0
Lowe's	3.1	7.8	8.2	1.4	79.4
Sam's Club	5.6	11.4	12.5	1.6	69.0
Albertsons	10.5	7.1	11.7	2.0	68.8
Ahold Delhaize	2.7	11.5	5.1	1.3	79.4
Health and beauty					
Walmart	2.7%	8.7%	10.0%	1.4%	77.1%
Target	7.8	8.4	14.5	1.6	67.7
Costco	18.3	4.2	13.9	2.1	61.6
Amazon	6.5	10.8	10.4	1.5	70.9
Kroger	3.0	8.1	7.5	1.2	80.3
Sam's Club	4.9	9.2	11.8	1.5	72.6
CVS	5.3	10.1	12.2	1.6	70.7
Dollar General	0.7	12.5	6.1	1.3	79.4
Walgreens	4.5	11.7	13.0	1.7	69.1
Dollar Tree	1.9	22.5	14.8	1.9	58.9

Source: Numerator, for 12 months ended Oct. 11, 2020. Numbers rounded. More info: [numerator.com](https://www.numerator.com).

MEDIA

Share of U.S. ad spending by medium

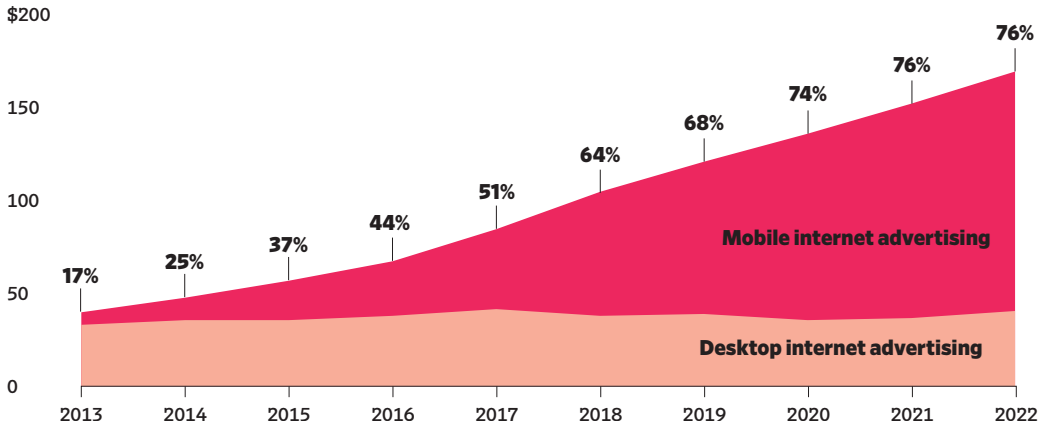
From Zenith. Internet advertising reached the halfway point in 2020, accounting for 54% of U.S. ad spending. The internet accounted for less than 17% of ad spending in 2010.



Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2020) based on current prices. Numbers rounded. Internet includes all internet advertising (including media owned by pure-play digital firms and digital extensions of traditional media such as a newspaper's website). Out of home includes outdoor and cinema. More info: zenithmedia.com.

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

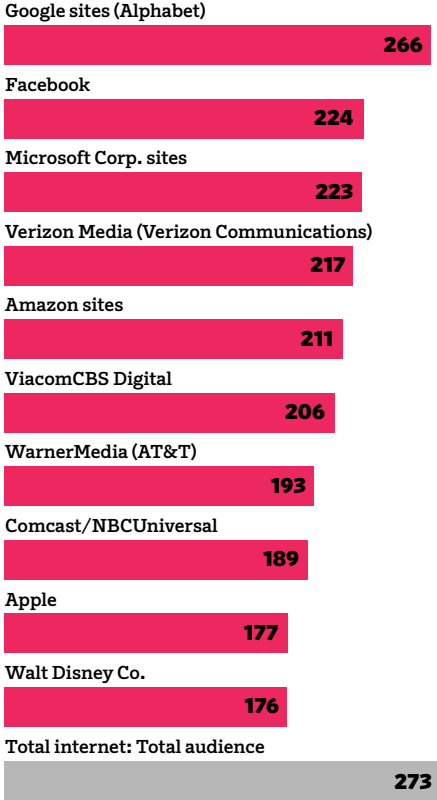
Total U.S. internet ad spending (mobile plus desktop) from Zenith. Dollars in billions. Mobile's share of U.S. internet advertising. Mobile will account for more than three-fourths of internet ad spending in 2021.



Source: Publicis Groupe's Zenith (Advertising Expenditure Forecasts, December 2020). Numbers rounded. Internet includes all internet advertising (including media owned by pure-play digital firms and digital extensions of traditional media such as a newspaper's website). More info: zenithmedia.com.

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

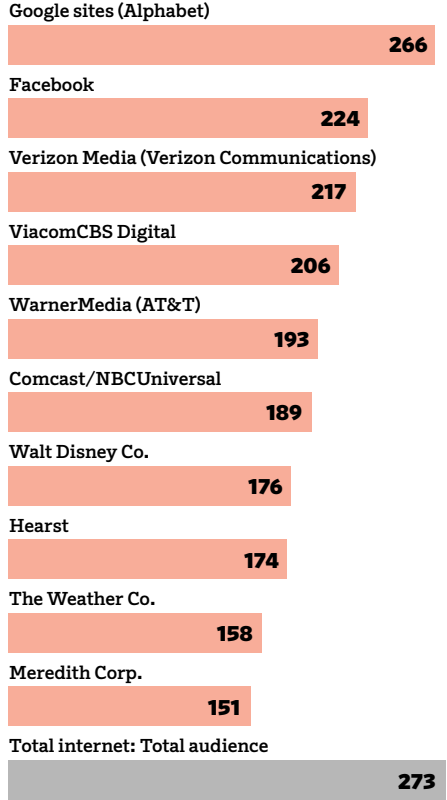
By September 2020 unique visitors in millions.



Source: Comscore Media Metrix Multi-Platform, Total Audience, Desktop 2+ and Total Mobile 13+, September 2020, U.S. Numbers rounded. More info: [comscore.com](https://www.comscore.com).

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

By September 2020 unique viewers in millions.



Source: Comscore Media Metrix Multi-Platform, Total Audience, Desktop 2+ and Total Mobile 13+, September 2020, U.S. Numbers rounded. More info: [comscore.com](https://www.comscore.com).

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

From September 2020. Smartphone apps are the digital platform of choice across age groups.

Age	Desktop	Mobile	Mobile consists of:			
			Smartphone app	Smartphone web	Tablet app	Tablet web
18-24	16.7%	83.3%	70.4%	6.2%	6.3%	0.6%
25-34	22.1	77.9	62.6	8.8	5.8	0.8
35-44	21.1	78.9	63.8	8.4	5.4	1.3
45-54	23.8	76.2	59.3	8.4	7.0	1.5
55-64	21.2	78.8	60.6	8.7	7.7	1.8
65+	24.1	75.9	50.4	7.5	14.8	3.3
Adults: 18+	21.4%	78.6%	61.9%	8.1%	7.3%	1.4%

Source: Comscore Media Metrix Multi-Platform and Mobile Metrix, Total Audience, Desktop 2+ and Total Mobile 18+, September 2020, U.S. Numbers rounded. More info: [comscore.com](https://www.comscore.com).

Biggest U.S. TV networks

By 2019 measured-media ad spending. Dollars in millions.

Broadcast TV

1. CBS ViacomCBS

\$5,682

2. NBC Comcast Corp. (NBC Universal)

\$4,690

3. ABC Walt Disney Co.

\$3,984

4. Fox Fox Corp.

\$3,422

5. Univision Univision Holdings

\$1,147

Cable TV

1. ESPN Walt Disney Co.

\$2,779

2. TNT AT&T (WarnerMedia)

\$1,765

3. TBS AT&T (WarnerMedia)

\$1,717

4. HGTV Discovery

\$1,588

5. Food Network Discovery

\$1,514

Source: Kantar. More info: kantar.com/media. Totals by TV and cable networks shown for calendar 2019 reflect a change in Kantar's national TV spending methodology and may not be comparable to 2018 data published a year ago in Ad Age Marketing Fact Pack 2020.

U.S. political ad spending

Media spending by office. Dollars in millions.

Office	Democrats	Republicans	Other	Total
President	\$2,123*	\$821	\$2	\$2,945
U.S. Senate	1,021	884	7	1,912
U.S. House	574	459	4	1,037
Governor	103	107	1	210
Total	\$3,820	\$2,271	\$14	\$6,105

Source: Media spending from Kantar/CMAG. More info: kantar.com. Spending for ads booked from Jan. 1, 2019 (including primaries) through Election Day as of Nov. 4, 2020. Includes political action committees and advocacy groups. Includes TV and radio; presidential and Senate campaigns include some digital spending. Excludes spending on ballot initiatives. Numbers rounded. *Includes \$1.1 billion spent for primaries (of which \$815 million was spent by billionaire candidates Mike Bloomberg and Tom Steyer).

Post-primary ad spending by medium in the 2020 presidential campaign

Including political action committees and advocacy groups. Dollars in millions.

Medium	Democrats	Republicans	Other	Total
Broadcast TV (excluding Hispanic)	\$534	\$402	\$0	\$936
Digital	200	219	0	420
Cable TV	213	101	1	315
Broadcast TV (Hispanic)	38	12	0	50
Radio - FM	26	6	0	32
Satellite TV	6	4	0	10
Radio - AM	4	1	0	6
Radio - state nets (statewide radio)	2	1	0	3
Total	\$1,023	\$747	\$1	\$1,770

Source: Media spending from Kantar/CMAG. More info: kantar.com. Spending for ads booked from April 9, 2020, the date Bernie Sanders dropped out, and excluding primary spending, through Election Day as of Nov. 4, 2020. Includes TV, radio and some digital spending. Numbers rounded.

Top broadcast and cable telecasts in 2020

Ranked by Live+7 viewership (live and time-shifted viewing within seven days). Super Bowl LIV on Fox last February averaged more than 102 million viewers (watching live or using time-shifting—DVR—within seven days).

Rank	Program	Originator	Telecast date	Live+7	
				Rating	Average viewership (millions)
1	Fox Super Bowl LIV	Fox	February 2, 2020	33.2	102.0
2	Fox NFC Championship	Fox	January 19, 2020	14.2	43.6
3	Fox NFC Playoff (Sunday)	Fox	January 12, 2020	12.4	38.0
4	AFC Wildcard Playoff	CBS	January 4, 2020	10.4	31.8
5	AFC Divisional Playoff (Saturday)	CBS	January 11, 2020	9.7	29.8
6	The Masked Singer	Fox	February 2, 2020	8.9	27.4
7	CFP Championship	ESPN	January 13, 2020	8.4	25.8
8	The Oscars	ABC	February 9, 2020	7.9	24.3
9	NBC NFL (Thursday)	NBC	September 10, 2020	6.8	20.9
10	Grammy Awards	CBS	January 26, 2020	6.4	19.8

Source: Nielsen (NNTV Program Report). More info: [nielsen.com](https://www.nielsen.com). Numbers rounded. All broadcast and cable, Dec. 30, 2019, through Nov. 1, 2020. Live+7. Broadcast prime. Persons age 2+. Excludes breakouts, duration less than five minutes and sustainers. Excludes pre- and post-gun sports programming (programming before and after game). Sample minimums applied.

Top prime-time shows in 2020

Ranked by Live+7 viewership (live and time-shifted viewing within seven days). NBC's "Sunday Night Football" averaged more than 16.2 million viewers (watching live or using time-shifting—DVR—within seven days).

Rank	Program	Originator	Number of telecasts	Live+7	
				Rating	Average viewership (millions)
1	Sunday Night Football	NBC	8	5.3	16.2
2	NCIS	CBS	10	5.0	15.4
3	FBI	CBS	9	4.2	12.9
4	Blue Bloods	CBS	9	4.0	12.2
5	Chicago Fire	NBC	11	3.9	12.1
6	Young Sheldon	CBS	11	3.8	11.7
7	Chicago P.D.	NBC	11	3.8	11.6
8	Chicago Med	NBC	11	3.7	11.4
9	This Is Us	NBC	10	3.7	11.3
10	Bull	CBS	10	3.5	10.9

Source: Nielsen (NNTV Program Report). More info: [nielsen.com](https://www.nielsen.com). Numbers rounded. All broadcast and cable, Dec. 30, 2019, through Nov. 1, 2020. Live+7. Broadcast prime. Persons age 2+. Excludes breakouts, duration less than five minutes and programs with fewer than four telecasts. Excludes pre- and post-gun sports programming (programming before and after game). Sample minimums applied.

Cost for a 30-second commercial

Estimated ad costs for a spot on fall 2020 broadcast network TV schedule. Percent change vs. fall 2019 prices. Prime time's most expensive spot is NBC's "Sunday Night Football," where the average cost for a 30-second commercial is \$783,718.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
ABC (Walt Disney Co.)							
7:00 p.m.	America's Funniest Home Videos \$49,290, -9%						
7:30							
8:00	Supermarket Sweep \$77,648, NA	Dancing with the Stars \$102,365, 12%	The Bachelorette \$155,071, 21%	The Goldbergs \$131,817, -2%	Station 19 \$110,588, 13%	Shark Tank \$86,451, 11%	Saturday Night Football \$83,404, -26%
8:30				Black-ish \$93,441, 7%			
9:00	Who Wants to be a Millionaire? \$75,725, NA			The Conners \$136,112, 0%	Grey's Anatomy \$213,829, 15%	20/20 \$39,899, -6%	
9:30				American Housewife \$85,568, 15%			
10:00	The Rookie \$67,889, 0%	The Good Doctor \$126,055, -5%	Big Sky \$89,731, NA	Stumptown \$89,121, 0%	A Million Little Things \$126,783, 13%		
CBS (ViacomCBS)							
7:00 p.m.	60 Minutes \$129,733, 10%						
7:30							
8:00	The Equalizer \$76,555, NA	The Neighborhood \$107,785, -3%	NCIS \$130,260, -4%		Young Sheldon \$157,213, -2%	MacGyver \$64,021, NA	Crimetime Saturday \$15,061, -17%
8:30		Bob Hearts Abishola \$90,701, -2%			B Positive \$97,717, NA		
9:00	NCIS: Los Angeles \$90,737, -3%	All Rise \$75,510, 7%	FBI \$97,832, 0%	The Amazing Race \$83,645, -3%	Mom \$125,187, 0%	Magnum P.I. \$68,590, -6%	Crimetime Saturday \$21,749, -1%
9:30					The Unicorn \$97,786, NA		
10:00	NCIS: New Orleans \$107,706, 12%	Bull \$92,557, 3%	FBI: Most Wanted \$81,543, -1%	Seal Team \$92,705, 8%	Evil \$91,172, -8%	Blue Bloods \$72,448, -13%	48 Hours \$33,853, -7%

From "What it costs to advertise in TV's biggest shows in 2020-2021 season" (AdAge.com, Oct. 30, 2020) by Jeanine Poggi. Networks may have made some changes to schedules since then. Table excludes shows that start at midseason. Table excludes The CW shows that start in January 2021.

Source: Ad Age. Based on data from four agencies. The resulting prices should be viewed as directional indicators and are not the actual price that every advertiser pays for a 30-second spot. The numbers are based on a range of agency estimates that can vary depending on the amount of inventory purchased from a network,

the inclusion of any nontraditional advertising such as product placements, and the relationship an advertiser and media-buying agency has with a network. Most TV advertising is typically purchased as part of larger negotiations, not on a one-off basis. These estimates also reflect the prices advertisers and networks agreed on in this year's upfront marketplace. Prices have likely changed for those wishing to buy a spot closer to the air date in the so-called "scatter" market. Not all shows shown.

© Copyright 2020 Crain Communications Inc., see p. 3.

Cost for a 30-second commercial

Estimated ad costs for a spot on fall 2020 broadcast network TV schedule. Percent change vs. fall 2019 prices.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Fox (Fox Corp.)							
7:00 p.m.							
7:30							
8:00	The Simpsons \$125,971, -5%	L.A.'s Finest \$71,289, NA	Cosmos: Possible Worlds \$82,312, NA	The Masked Singer \$225,764, 12%	Thursday Night Football \$624,626, 16%	WWE's SmackDown Live \$57,293, 1%	Fox Sports Saturday \$77,930, 9%
8:30	Bless the Hearts \$101,436, -1%						
9:00	Bob's Burgers \$86,896, -21%	Filthy Rich \$70,506, -3%	Next \$89,486, 6%	MasterChef Junior \$80,587, 12%			
9:30	Family Guy \$114,347, 5%						
NBC (Comcast Corp. [NBC Universal])							
7:00 p.m.	Football Night in America \$85,546, -6%						
7:30							
8:00	Sunday Night Football (8:20 p.m.) \$783,718, 14%	The Voice \$254,224, 32%	The Voice \$216,970, 21%	Chicago Med \$135,242, 2%	Superstore \$111,281, 8%	The Blacklist \$86,530, 10%	Dateline Saturday Night Mystery \$33,516, -15%
8:30					Brooklyn Nine-Nine \$104,126, 27%		
9:00			This Is Us \$476,352, 33%	Chicago Fire \$133,567, -5%	Law & Order: SVU \$149,776, 38%	Dateline NBC \$56,434, 22%	Saturday Night Live (encores) \$31,000, -3%
9:30							
10:00		Manifest \$113,843, -8%	New Amsterdam \$138,692, -19%	Chicago P.D. \$131,011, -8%	Law & Order: Organized Crime \$109,352, NA		
The CW (AT&T [WarnerMedia]/ViacomCBS)							
8:00 p.m.	Masters of Illusion \$21,864, NA	Whose Line Is It Anyway? \$20,659, NA		Two Sentence Horror Stories \$10,461, NA	Supernatural \$29,028, 6%	World's Funniest Animals \$15,718, NA	
8:30		Whose Line Is It Anyway? \$20,159, NA					
9:00	Pandora \$17,976, NA	Penn & Teller: Fool Us \$16,391, NA				Penn & Teller: Fool Us \$13,891, NA	

AGENCIES

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

By 2019 worldwide revenue. Dollars in billions.

1. WPP, London

\$16.9

2. Omnicom Group, New York

\$15.0

3. Publicis Groupe, Paris

\$12.3

4. Accenture's Accenture Interactive, New York

\$10.3

5. Interpublic Group of Cos., New York

\$10.2

6. Dentsu Group*, Tokyo

\$9.6

7. Deloitte's Deloitte Digital, New York

\$7.9

8. PwC's PwC Digital Services, New York

\$6.7

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

\$5.6

10. BlueFocus Communication Group, Beijing

\$4.1

From Ad Age Agency Report 2020 (May 11, 2020). Detailed rankings and report methodology: [AdAge.com/agencyreport2020](https://www.adage.com/agencyreport2020) and [AdAge.com/agencyfamilytrees2020](https://www.adage.com/agencyfamilytrees2020). Source: Ad Age Datacenter. Numbers rounded. Asterisk indicates Ad Age Datacenter estimate.

© Copyright 2020 Crain Communications Inc.; see p. 3.

Ad Age Agency Report: World's biggest agency networks

By 2019 estimated worldwide revenue. Dollars in billions.

More in Ad Age Datacenter
Agency companies: Who owns what
[AdAge.com/agencyfamilytrees2020](https://www.adage.com/agencyfamilytrees2020)

Rank	Network	Company	2019 worldwide revenue
1	Accenture Interactive	Accenture	\$10.3
2	Deloitte Digital	Deloitte	7.9
3	PwC Digital Services	PwC	6.7
4	IBM iX*	IBM Corp.	5.6
5	BlueFocus (China)	BlueFocus Communication Group	3.6
6	McCann Worldgroup*	Interpublic	2.8
7	Wunderman Thompson*	WPP	2.6
8	Dentsu International*	Dentsu	2.6
9	Dentsu Japan Network*	Dentsu	2.4
10	Publicis Sapient*	Publicis	2.1
11	TBWA Worldwide*	Omnicom	2.1
12	DDB Worldwide Communications Group*	Omnicom	1.9
13	BBDO Worldwide*	Omnicom	1.8
14	Ogilvy*	WPP	1.8
15	Advantage Marketing Partners	Advantage Solutions	1.7
16	Publicis Worldwide*	Publicis	1.7
17	Epsilon*	Publicis	1.7
18	Hakuhodo*	Hakuhodo DY Holdings	1.7
19	Havas Creative Group*	Vivendi	1.6
20	Omnicom Precision Marketing Group*	Omnicom	1.6
21	Quad	Quad	1.4
22	RRD Marketing Solutions	R.R. Donnelley	1.3
23	Omnicom Health Group*	Omnicom	1.2
24	Leo Burnett Worldwide*	Publicis	1.1
25	FCB (Foote, Cone & Belding)*	Interpublic	1.1
Ad Age Agency Report: Top 25			\$70.2B

From Ad Age Agency Report 2020 (May 11, 2020). Expanded table and report methodology: [AdAge.com/agencyreport2020](https://www.adage.com/agencyreport2020). Source: Ad Age Datacenter. Numbers rounded. Asterisk indicates Ad Age Datacenter estimate.

© Copyright 2020 Crain Communications Inc.; see p. 3.

Ad Age Agency Report: Biggest worldwide agency ventures by category

By 2019 estimated worldwide revenue. The world's 25 largest agency companies had 2019 worldwide revenue of \$119.1 billion.

Category/ largest venture, company	2019 worldwide revenue in category	Category grouping	2019 worldwide revenue for category grouping
Agency company WPP	\$16.9 billion	25 largest agency companies	\$119.1 billion
Consolidated agency network Accenture Interactive, Accenture	\$10.3 billion	25 largest agency networks	\$70.2 billion
Digital agency network Accenture Interactive, Accenture	\$10.3 billion	15 largest digital agency networks	\$39.6 billion
Media agency group GroupM, WPP	\$6.2 billion	Five largest media agency groups	\$19.7 billion
Media agency network Wavemaker, WPP	\$1.5 billion	15 largest media agency networks	\$13.6 billion
Ad agency Dentsu, Dentsu	\$2.4 billion	10 largest ad agencies	\$13.6 billion
CRM/direct marketing agency network Deloitte Digital, Deloitte	\$3.8 billion	10 largest CRM/direct marketing agency networks	\$12.3 billion
Public relations agency network Edelman, DJE Holdings	\$892 million	10 largest public relations agency networks	\$5.0 billion

From Ad Age Agency Report 2020 (May 11, 2020). Some agencies and networks may have changed names or structure since report was published. Expanded rankings and footnotes: [AdAge.com/agencyreport2020](https://adage.com/agencyreport2020).

Source: Ad Age Datacenter estimates.

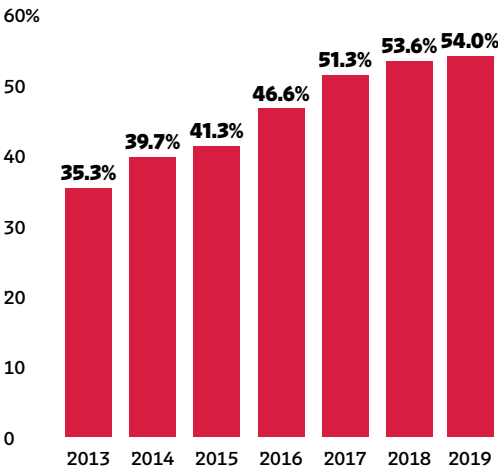
© Copyright 2020 Crain Communications Inc.; see p. 3.

U.S. agency digital share and revenue growth, 2013-2019

From Agency Reports.

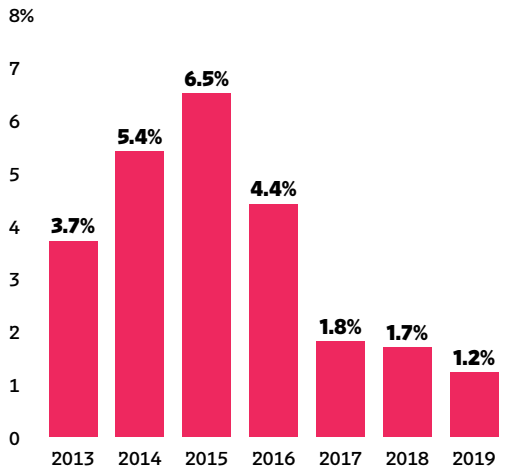
Ad Age Agency Report: Digital share of U.S. agency revenue

Digital work accounted for an estimated 54% of revenue for U.S. agencies from all disciplines in 2019.



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

Revenue for agencies from all disciplines grew 1.2% in 2019, the weakest growth since the post-Great Recession recovery began in 2010.



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

© Copyright 2020 Crain Communications Inc.; see p. 3.

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

By 2019 estimated U.S. revenue. The world's 25 largest agency companies had 2019 U.S. revenue of \$52.4 billion.

Category/ largest venture, company	2019 U.S. revenue in category	Category grouping	2019 U.S. revenue for category grouping
Agency company Omnicom Group	\$8.0 billion	World's 25 largest agency companies	\$52.4 billion
Consolidated agency network Accenture Interactive, Accenture	\$4.3 billion	World's 25 largest agency networks	\$29.9 billion
Agencies from all disciplines Accenture Interactive, Accenture	\$4.3 billion	More than 400 U.S. agencies from all disciplines ¹	\$55.2 billion
Digital agency network Accenture Interactive, Accenture	\$4.3 billion	15 largest digital agency networks	\$19.3 billion
Media agency network Spark Foundry, Publicis	\$477 million	15 largest media agency networks	\$4.5 billion
Ad agency BBDO Worldwide, Omnicom	\$691 million	25 largest ad agencies	\$6.3 billion
CRM/direct marketing agency network Deloitte Digital, Deloitte	\$2.3 billion	25 largest CRM/direct marketing agency networks	\$9.8 billion
Promotion agency network Advantage Marketing Partners, Advantage Solutions	\$1.2 billion	25 largest promotion agency networks	\$5.3 billion
Experiential/event marketing agency network Advantage Marketing Partners, Advantage Solutions	\$1.2 billion	15 largest experiential/ event marketing agency networks	\$3.6 billion
Health care agency network Omnicom Health Group, Omnicom	\$939 million	25 largest health care agency networks	\$5.2 billion
Public relations agency network Edelman, DJE Holdings	\$554 million	25 largest public relations agency networks	\$3.7 billion

From Ad Age Agency Report 2020 (May 11, 2020). Some agencies and networks may have changed names or structure since report was published. Expanded rankings and footnotes: [AdAge.com/agencyreport2020](https://www.adage.com/agencyreport2020).

Source: Ad Age Datacenter estimates.

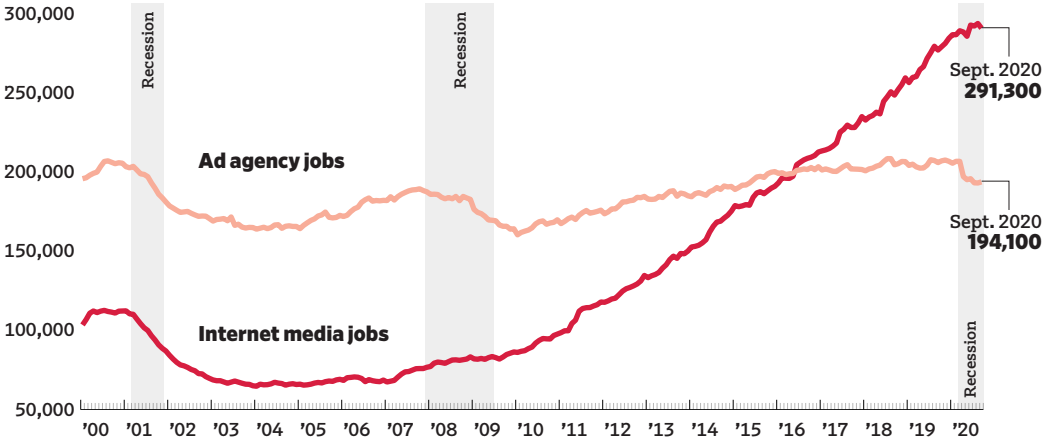
© Copyright 2020 Crain Communications Inc.; see p. 3.

1. U.S. revenue of more than 400 agencies from all disciplines in Agency Report 2020.

JOBS

U.S. ad agency and internet media employment

Ad agency staffing (194,100 in September 2020) is near its lowest point since 2015. Internet media¹ staffing (291,300 in September 2020) has doubled since early 2013.



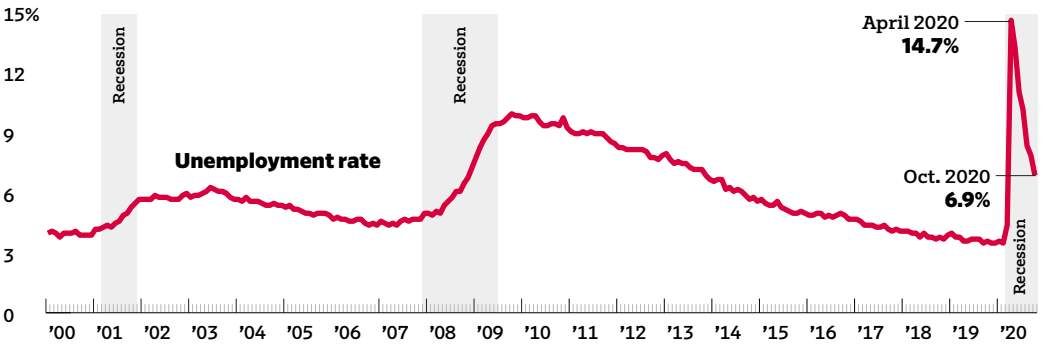
U.S. media employment

Share of media² jobs in 2020, 2019 (pre-pandemic) and 2007 (eve of Great Recession). Internet media ventures now account for about 41% of media employment.

Year	Internet media	TV	Newspaper	Radio	Magazine
2007	8.6%	23.9%	38.8%	12.6%	16.1%
2019	37.6	24.3	16.8	10.7	10.6
2020	40.8	24.2	14.9	10.1	10.0

U.S. unemployment rate

The unemployment rate has fallen sharply from its pandemic peak of 14.7% in April 2020, which was the highest level since 1939. At the start of recession (February 2020), the unemployment rate was 3.5%, the lowest level since 1969.



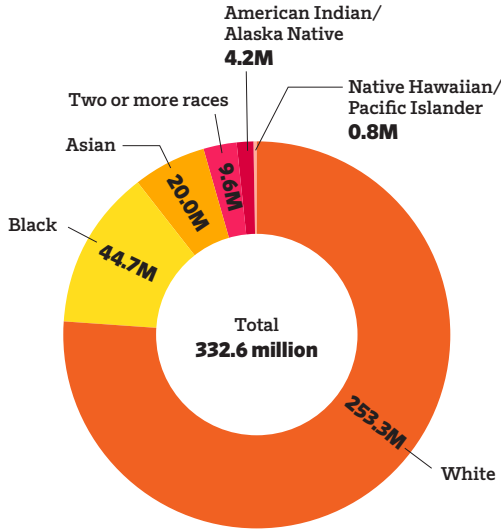
Source: Ad Age Datacenter analysis of Bureau of Labor Statistics data. Recession began in February 2020. See expanded jobs data: [AdAge.com/adjobs](https://adage.com/adjobs).

1. Internet media businesses and web search portals.
 2. Internet media businesses and web search portals, TV, newspaper, magazine, radio. November 2007; December 2019; September 2020.

CONSUMERS

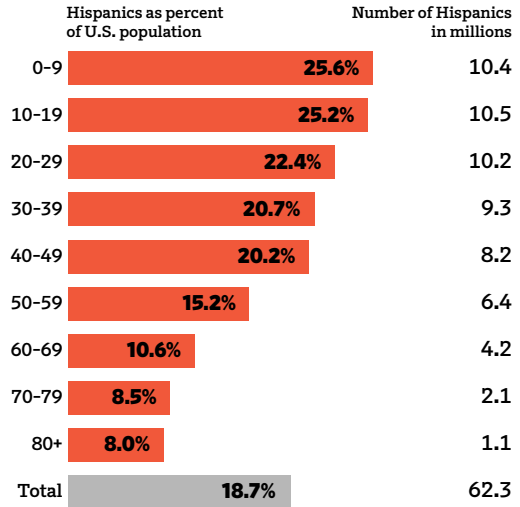
2020 U.S. population by race

Population in millions.



Hispanics' share of population by age in 2020

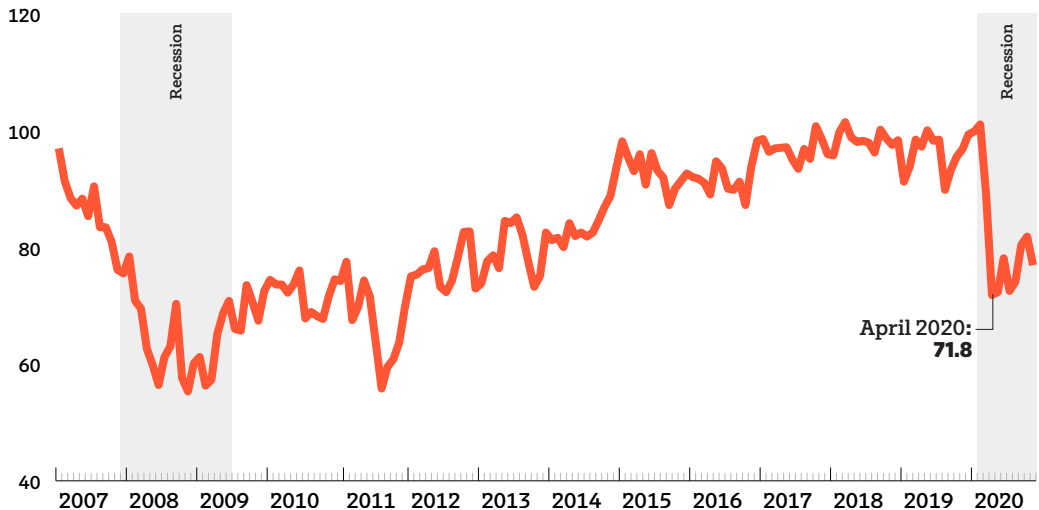
Hispanics account for more than 20% of the U.S. population for every age up through age 46.



Source: Census Bureau. Projections for July 1, 2020, from National Population Projections (2017 datasets). Numbers rounded. More info: [census.gov](https://www.census.gov).

Consumer confidence: Index of consumer sentiment

The University of Michigan index of consumer sentiment in April 2020—early in the coronavirus pandemic—tumbled to 71.8 (lowest point since 2011) after reaching 101.0 in February 2020 (near a 16-year high). The index in November 2020 stood at 76.9.



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

How Americans use leisure time

Americans age 15-plus on average had 5.2 hours of leisure time per day in 2019. Watching TV remains by far the No. 1 leisure activity.

	Age									Gender	
	15+	15-19	20-24	25-34	35-44	45-54	55-64	65-74	75+	F	M
Average leisure hours per day in 2019											
All days	5.2	5.3	4.9	4.3	4.0	4.4	5.5	7.1	7.7	4.9	5.5
Weekdays	4.6	4.7	4.5	3.6	3.3	3.6	5.0	6.9	7.4	4.5	4.9
Weekends, holidays	6.4	6.7	5.9	5.8	5.5	6.2	6.6	7.5	8.3	5.8	7.1
Average weekday leisure hours spent in 2019											
Watching TV	2.6	1.7	2.0	1.8	1.7	2.1	3.0	4.5	4.6	2.5	2.7
Socializing and communicating	0.5	0.7	0.4	0.5	0.4	0.4	0.5	0.5	0.6	0.5	0.5
Playing games and computer use for leisure	0.4	1.1	0.7	0.4	0.3	0.2	0.2	0.3	0.4	0.3	0.5
Reading	0.3	NA	0.1	0.1	0.1	0.2	0.3	0.5	0.7	0.3	0.2
Participating in sports, exercise and recreation	0.3	0.6	0.6	0.3	0.2	0.2	0.2	0.3	0.2	0.2	0.4
Relaxing/thinking	0.3	0.2	0.2	0.2	0.3	0.2	0.4	0.5	0.5	0.3	0.3
Other leisure and sports activities ¹	0.3	0.4	0.4	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.3

Source: Bureau of Labor Statistics' 2019 American Time Use Survey (released June 2020). More info: [bls.gov/tus](https://www.bls.gov/tus).
 1. Including travel related to leisure and sports activities.

How TV viewers are multitasking

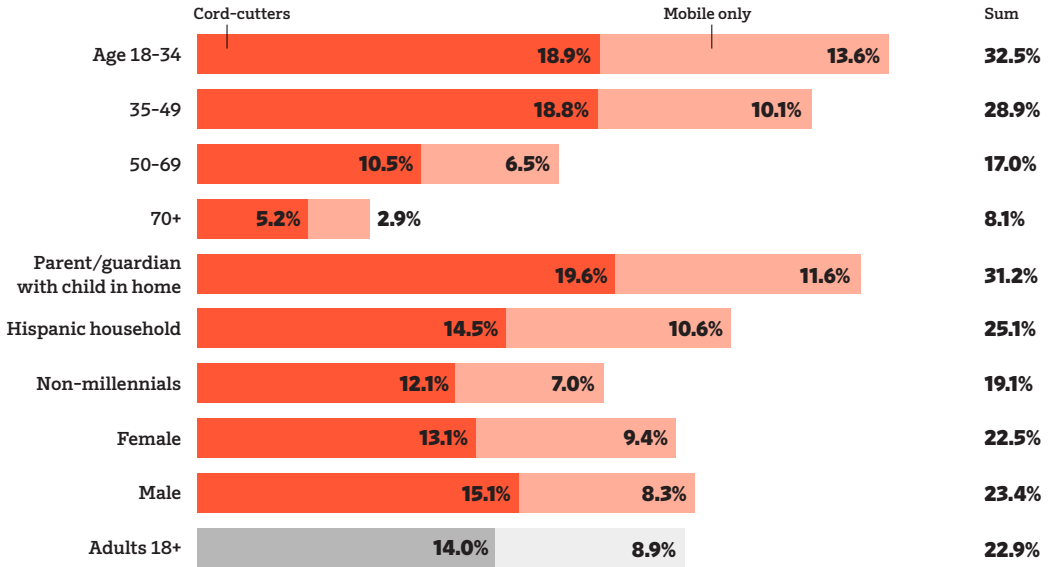
Percent of adults who do these activities while watching TV.

	Very often	Often	Somewhat often	Not very often	Not at all
Visit websites on mobile phone	30.2%	20.5%	18.9%	11.6%	18.8%
Text on mobile phone	29.4	21.0	19.9	15.3	14.5
Talk on mobile phone	22.1	15.7	16.1	22.6	23.6
Visit websites on computer	20.9	16.7	16.1	11.5	34.8
Email on computer	17.1	13.8	14.2	13.6	41.2
Instant message on computer	9.4	6.7	7.6	9.6	66.8
Play video games	9.0	5.4	6.3	6.2	73.2
Listen to radio	8.8	5.3	5.6	7.2	73.1
Watch videos on computer	7.6	6.0	6.8	9.9	69.7
Read magazine or comic	5.5	5.7	9.0	13.4	66.4

Source: Simmons National Consumer Study, Spring 2020. Courtesy of MRI-Simmons. Numbers rounded. Results based on adult survey participants who answered question (and so results exclude non-responses). More info: [mrisimmons.com](https://www.mrisimmons.com).

Demographics of cord-cutters

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



Source: Simmons National Consumer Study, Spring 2020. Courtesy of MRI-Simmons. Numbers rounded. Base: Study universe. More info: mrisimmons.com. Cord-cutters include cord-nevers (those who have never paid for TV).

Binge-watching

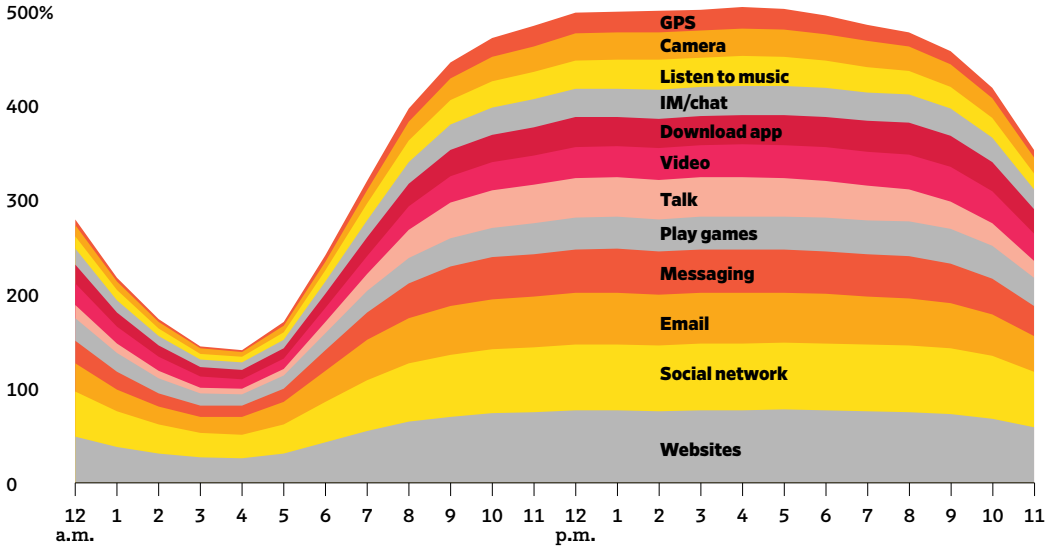
Percent of people in various age groups who binge-watch TV series. Among adults age 18 to 34, 82% binge-watch TV shows sometimes, frequently or always.

	Age					Parent*	Gender	
	18+	18-34	35-49	50-64	65+		F	M
How often do you binge-watch TV (watch three or more episodes in one sitting)?								
Always/almost always	17.4%	27.2%	22.2%	10.9%	5.3%	27.1%	15.5%	19.4%
Frequently—more than half of the time I watch TV	23.5	31.4	28.6	17.7	12.9	29.8	23.3	23.7
Sometimes—half the time I watch TV or less	23.0	23.6	23.3	23.7	20.9	22.5	25.6	20.1
Rarely—only a few times I watch TV	20.2	11.4	15.6	26.5	31.0	13.1	19.8	20.7
Never	15.4	5.8	10.0	21.0	29.3	7.2	15.3	15.6
For those who sometimes, frequently or always binge-watch TV, how many hours in a typical week are you binge-viewing?								
1-4 hours	37.2%	37.0%	36.7%	38.2%	37.4%	36.1%	38.4%	35.9%
5-9	29.2	27.4	29.7	30.2	32.0	28.5	27.7	30.9
10-14	16.6	17.9	16.6	15.2	14.8	16.9	14.9	18.4
15-19	5.4	6.0	5.4	5.1	3.9	6.4	5.4	5.3
20+	11.6	11.7	11.5	11.3	12.0	12.1	13.5	9.5

Source: MRI-Simmons Cord Evolution Study, July 2020. Numbers rounded. More info: mrisimmons.com. *Parent with child at home.

When and how smartphone owners use their devices

Accessing websites is the most popular activity on smartphones, followed by social networking. Peak hour for mobile web surfing is 5 p.m., when 78% of adult smartphone owners use their phones to visit a website.



Source: MRI-Simmons Connect Study, Spring 2020. Base: Smartphone users. Percentages indicate unduplicated aggregate percentage of smartphone owners who engage in the activity in that hour at least once during a typical week. For example, 78% of smartphone owners use their phone's web browser to access a website between 5 p.m. and 6 p.m. at least once in a week. More info: mrisimmons.com.

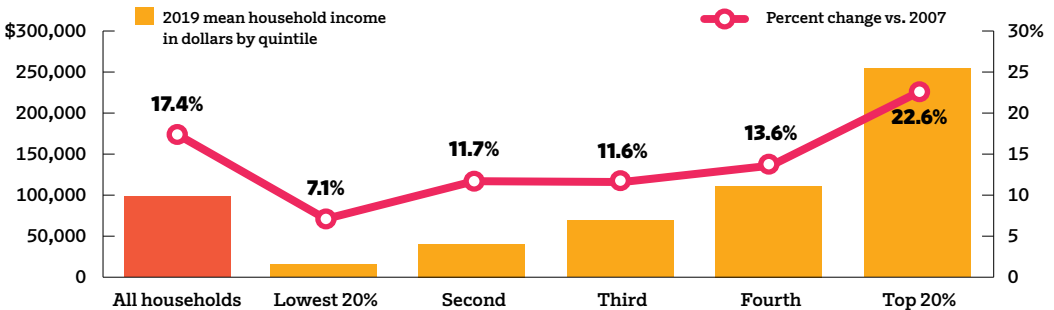
U.S. households rich to poor: Income distribution¹

Share of aggregate income by household-income quintiles. The bottom group had 3.1 percent of 2019 income.

Year	Lowest 20%	Second	Third	Fourth	Top 20%
1980	4.2%	10.2%	16.8%	24.7%	44.1%
1990	3.8	9.6	15.9	24.0	46.6
2000	3.6	8.9	14.8	23.0	49.8
2010	3.3	8.5	14.6	23.4	50.3
2019	3.1	8.3	14.1	22.7	51.9

U.S. households rich to poor: Mean income²

By 2019 household-income quintile; change vs. prerecession 2007. Rich households have had the biggest percent gains.



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

