

Top Advertisers

\$6.9 billion
Amazon's 2019 U.S. ad and promotion spending, vaulting it to No. 1 spot

-12.9 percent
GroupM's 2020 U.S. media ad revenue forecast, excluding political ads

LEADING NATIONAL ADVERTISERS 2020 FACT PACK

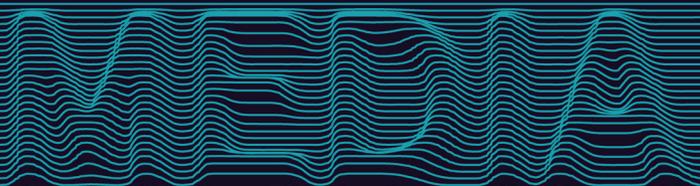
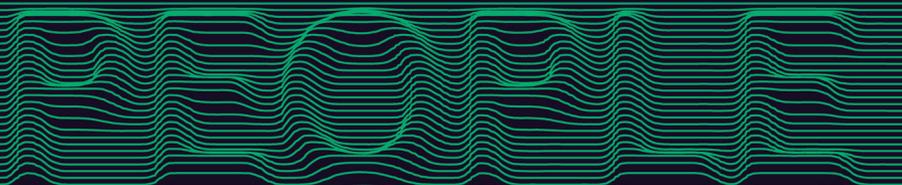
47
Marketers that spent more than \$1 billion on 2019 U.S. advertising

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THE BIG LIST

10 key stats from Ad Age Leading National Advertisers 2020

The advertising economy in 2019 reached a record high in the U.S. (media ad revenue of \$239 billion excluding political ads, up 6.8 percent) and the world (media ad revenue of \$587 billion, up 6.2 percent), according to WPP's GroupM.

Ad spending for the top 200 U.S. advertisers shown in this Fact Pack also reached an all-time high, climbing 4.6 percent.

Marketers slammed the brakes on spending in early 2020 as the nation plunged into the deepest recession since the end of World War II. This Fact Pack serves as the before—before COVID-19 and recession.

Economists say the recession probably hit bottom in April or May. Ad spending should see growth next year. But it likely will be some years before U.S. ad spending breaks the record set in 2019.

1. Ad spending in 2020

-12.9 PERCENT

Media ad revenue. GroupM's U.S. forecast

2. Ad spending in 2021

+4.2 PERCENT

Media ad revenue. GroupM's U.S. forecast

3. Internet ad spending in 2020

-2.5 PERCENT

Pure-play internet ventures.
GroupM's U.S. forecast

4. Internet ad spending in 2021

+11.8 PERCENT

Pure-play internet ventures.
GroupM's U.S. forecast

5. Ad Age Leading National Advertisers

+4.6 PERCENT

Top 200's 2019 total U.S. ad spending

6. USAA

+69 PERCENT

Highest ad spending growth among top 200

7. Amazon

\$6.9 BILLION

Biggest U.S. advertiser.
Estimated 2019 total U.S. ad spending

8. Billion-dollar spenders

47

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

9. Geico

\$1.6 BILLION

Most-advertised brand. 2019 U.S. measured-media spending

10. Tesla

14 CENTS

2019 U.S. measured-media spending per vehicle sold

Source: Ad Age Datacenter, WPP's GroupM, Kantar. GroupM figures shown above exclude political advertising.

Marketers 5

Ad Age Leading National Advertisers: Top 200	Fastest-growing ad spenders
----------------------------------------------	-----------------------------

Ad spending analysis 18

Ad spending forecast	Share of ad spending by medium over time
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Leading National Advertisers spending growth over time	Measured-media spending by medium
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Measured-media spending by category	
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Biggest U.S. spenders 24

Broadcast network TV	Cable TV networks
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Broadcast spot TV	Radio
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Desktop search	Desktop internet display
----------------	--------------------------

Magazine	Outdoor
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Most-advertised brands	
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Market leaders 27

Retailers	Restaurant chains
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Auto marketers	U.S. light-vehicle sales
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Auto brands	Ad spending per vehicle sold
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Personal care brands	Household product brands
----------------------	--------------------------

Beverage brands	Beer marketers
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Prescription drug brands	Wireless services
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Insurance brands	Credit cards
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Ad Age Leading National Advertisers 2020 Fact Pack

Quick stats on ad spending for the biggest marketers and brands. Published July 13, 2020. More online: [AdAge.com/lna2020](https://www.adage.com/lna2020)

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Marketers database

Datacenter subscribers get access to company profiles, ad spending, brands, executives and agency rosters for nation's 100 biggest advertisers. [AdAge.com/marketertrees2020](https://www.adage.com/marketertrees2020)

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Ad Age Leading National Advertisers

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

Advertisers 1-25

Rank	Marketer	Headquarters	Total U.S. ad spending 2019	U.S. measured-media ad spending 2019
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
No. 14 T-Mobile US		T-Mobile in April bought Sprint Corp., combining the third- and fourth-largest wireless firms. T-Mobile in July sold Sprint's Boost Mobile prepaid brand to DISH Network Corp. (No. 62).		
		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	Bellevue, Wash.	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

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. Full report: AdAge.com/lna2020. Marketer database: AdAge.com/marketertrees2020. About LNA 2020: AdAge.com/aboutlna2020.

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1. Amazon: Estimated advertising and promotion spending. Estimate based on a revision to Ad Age's spending model.

2. Comcast: Estimated advertising, marketing and promotion spending.

4. Procter & Gamble: Estimated spending on advertising plus other marketing costs. Year ended June 2019.

5. Walt Disney: Estimated pro forma ad spending including 21st Century Fox (acquired March 2019). Year ended September 2019.

9. American Express: Estimated marketing and promotion expenses.

14. T-Mobile: Estimated pro forma ad spending including Sprint Corp. (acquired in April 2020) and excluding Boost Mobile (sold in July 2020).

16. Nestlé: Estimated "consumer facing" marketing expenses.

20. Fiat Chrysler Automobiles: Estimated ad spending. FCA and PSA Groupe in October 2019 announced plan to merge.

The background features a complex, abstract pattern of overlapping, wavy lines in shades of purple and pink, creating a sense of depth and movement. The lines are thin and densely packed, especially on the left side where they converge towards a point, creating a tunnel-like effect.

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Ad Age Leading National Advertisers

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

Advertisers 26-50

Rank	Marketer	Headquarters	Total U.S. ad spending 2019	U.S. measured-media ad spending 2019
26	LVMH Moët Hennessy Louis Vuitton	Paris	\$1,649	\$372
27	Target Corp.	Minneapolis	1,647	445
28	McDonald's Corp.	Chicago	1,617	624
29	Booking Holdings	Norwalk, Conn.	1,594	842
30	GlaxoSmithKline	Brentford, U.K.	1,539	948
31	Johnson & Johnson	New Brunswick, N.J.	1,537	776
32	Anheuser-Busch InBev	Leuven, Belgium	1,532	440
33	Toyota Motor Corp.	Toyota City, Japan	1,508	820
34	Merck & Co.	Kenilworth, N.J.	1,506	278
35	Nike	Beaverton, Ore.	1,470	66
No. 36 AbbVie		AbbVie, looking to diversify its pharmaceutical portfolio beyond blockbuster Humira, in May bought Allergan, the Dublin-based pharma marketer behind Botox, Linzess and Vraylar.		
		North Chicago, Ill.	1,390	1,185
37	Honda Motor Co.	Tokyo	1,390	373
38	Unilever	London/Rotterdam, Netherlands	1,363	640
39	ViacomCBS	New York	1,355	505
40	Macy's	New York	1,330	410
41	State Farm Mutual Auto Insurance Co.	Bloomington, Ill.	1,209	802
42	Kohl's Corp.	Menomonee Falls, Wis.	1,156	285
43	Home Depot	Atlanta	1,090	429
44	Wells Fargo & Co.	San Francisco	1,076	259
45	Yum Brands	Louisville, Ky.	1,070	777
46	Netflix	Los Gatos, Calif.	1,063	176
47	U.S. Government	Washington	1,058	643
48	Estée Lauder Cos.	New York	994	66
49	Nissan Motor Co.	Yokohama, Japan	990	610
50	Wayfair	Boston	932	199

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. Full report: AdAge.com/lina2020. Marketer database: AdAge.com/marketertrees2020. About LNA 2020: AdAge.com/aboutlina2020.

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29. Booking: Estimated marketing expenses. Estimate based on a revision to Ad Age's spending model.

30. GlaxoSmithKline: Estimated pro forma ad spending.

36. AbbVie: Estimated pro forma ad spending including Allergan (acquired May 2020). Estimate based on a revision to Ad Age's spending model.

39. ViacomCBS: Estimated ad spending. Viacom and CBS Corp. merged in December 2019.

Advertisers 51-75

Rank	Marketer	Headquarters	Total U.S. ad spending 2019	U.S. measured-media ad spending 2019
51	Diageo	London	\$918	\$165
52	Sanofi	Paris	889	583
53	Discover Financial Services	Riverwoods, Ill.	883	276
54	Mars Inc.	McLean, Va.	880	466
55	Eli Lilly & Co.	Indianapolis	864	499
56	Kroger Co.	Cincinnati	854	173
57	Allstate Corp.	Northbrook, Ill.	854	504
58	Molson Coors Beverage Co.	Golden, Colo./Montreal	822	250
59	Apple	Cupertino, Calif.	818	666
60	Microsoft Corp.	Redmond, Wash.	816	587
61	Coca-Cola Co.	Atlanta	816	429
62	DISH Network Corp.	Englewood, Colo.	815	231
63	Lowe's Cos.	Mooresville, N.C.	811	330
64	Kraft Heinz Co.	Pittsburgh/Chicago	782	475
65	Volkswagen	Wolfsburg, Germany	780	431
66	IAC (IAC/InterActiveCorp)	New York	775	453
67	Best Buy Co.	Richfield, Minn.	772	233
No. 68 Intuit		Intuit, marketer of QuickBooks and TurboTax, in February announced a \$7.1 billion deal to acquire Credit Karma (No. 190), a consumer technology company focused on personal finance. Mountain View, Calif.	760	318
69	Uber Technologies	San Francisco	756	66
70	Constellation Brands	Victor, N.Y.	749	414
71	Sony Corp.	Tokyo	746	349
72	Cox Enterprises	Atlanta	715	243
73	Citigroup	New York	691	128
74	Adidas	Herzogenaurach, Germany	688	37
75	LendingTree	Charlotte, N.C.	688	364

62. DISH: Estimated pro forma ad spending including Boost Mobile (acquired in July 2020).

64. Kraft Heinz: Estimated advertising and marketing expenses. Estimate based on a revision to Ad Age's spending model.

66. IAC: Estimated ad spending including Match Group. Match in June 2020 fully separated from IAC.

Ad Age Leading National Advertisers

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

Advertisers 76-100

Rank	Marketer	Headquarters	Total U.S. ad spending 2019	U.S. measured-media ad spending 2019
76	Amgen	Thousand Oaks, Calif.	\$685	\$474
77	Gilead Sciences	Foster City, Calif.	683	321
78	Facebook	Menlo Park, Calif.	671	391
79	Lions Gate Entertainment Corp.	Santa Monica, Calif.	668	294
80	Marriott International	Bethesda, Md.	667	207
81	EssilorLuxottica	Charenton-le-Pont, France	655	83
No. 82 J.C. Penney Co.		JCPenney filed for Chapter 11 in May as COVID-19 pushed the struggling retailer over the edge. Penney's gross ad spending tumbled to \$644 million last year from \$1.5 billion back in 2007.		
		Plano, Texas	644	239
83	Liberty Mutual Holding Co.	Boston	640	435
84	Daimler	Stuttgart, Germany	640	214
85	Hyundai Motor Co.	Seoul, South Korea	627	355
86	Walgreens Boots Alliance	Deerfield, Ill.	621	245
87	Dell Technologies	Round Rock, Texas	618	194
88	IBM Corp.	Armonk, N.Y.	606	258
89	RB (Reckitt Benckiser Group)	Slough, U.K.	593	315
90	Keurig Dr Pepper	Burlington, Mass.	593	227
91	Restaurant Brands International	Toronto	589	512
92	Inspire Brands	Atlanta	589	470
93	Clorox Co.	Oakland, Calif.	581	214
94	Novartis	Basel, Switzerland	579	327
95	eBay	San Jose, Calif.	562	101
96	Gap Inc.	San Francisco	562	160
97	Takeda Pharmaceutical Co.	Tokyo	541	137
98	Kia Motors Corp.	Seoul, South Korea	534	279
99	Coty	New York	531	254
100	Subaru Corp.	Tokyo	523	322

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. Full report: AdAge.com/lna2020. Marketer database: AdAge.com/marketertrees2020. About LNA 2020: AdAge.com/aboutlna2020.

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76. Amgen: Estimated ad spending. Acquired global rights for Otezla in November 2019.

89. RB: Estimated "brand equity investment."

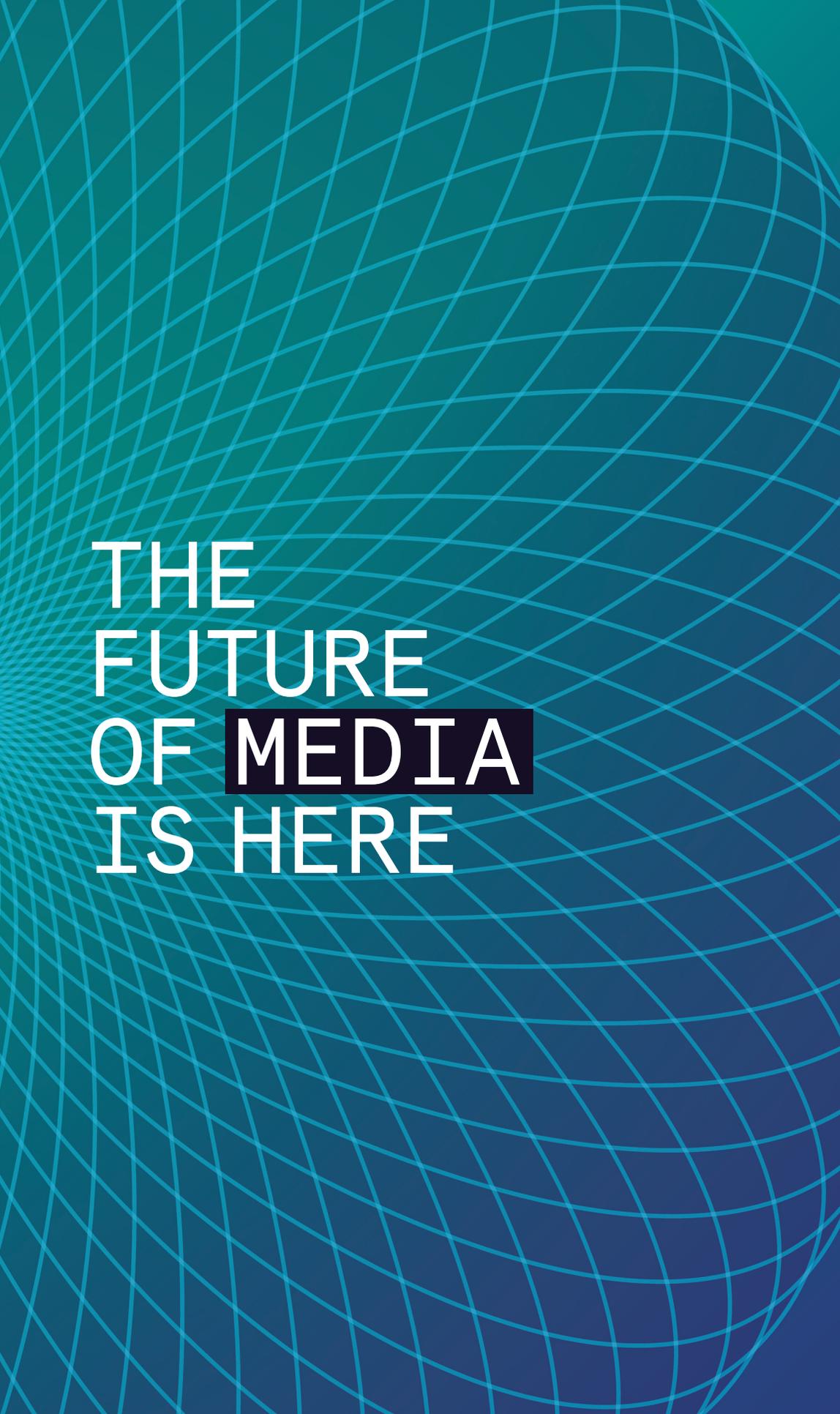
94. Novartis: Estimated pro forma spending excluding Alcon (spun off in April 2019).

97. Takeda: Estimated advertising and sales promotion spending. Bought Shire in January 2019. Year ended March 2020.

Advertisers 101-125

Rank	Marketer	Headquarters	Total U.S. ad spending 2019	U.S. measured-media ad spending 2019
101	Henkel	Duesseldorf, Germany	\$517	\$81
102	Bed Bath & Beyond	Union, N.J.	509	44
103	Bristol-Myers Squibb Co.	New York	502	195
104	Albertsons Cos.	Boise, Idaho	498	40
105	Colgate-Palmolive Co.	New York	497	148
106	Visa	San Francisco	494	57
107	Dunkin' Brands Group	Canton, Mass.	474	183
108	AstraZeneca	Cambridge, U.K.	473	213
109	Doctor's Associates (Subway)	Milford, Conn.	459	219
110	Bayer	Leverkusen, Germany	447	444
111	Salesforce	San Francisco	447	37
112	General Mills	Minneapolis	445	482
113	Hershey Co.	Hershey, Pa.	432	462
114	Domino's Pizza	Ann Arbor, Mich.	428	467
115	Chewy	Dania Beach, Fla.	427	179
116	U.S. Bancorp	Minneapolis	426	47
117	Church & Dwight Co.	Ewing, N.J.	422	247
118	Suntory Holdings (Beam Suntory)	Tokyo	419	113
119	Novo Nordisk	Bagsvaerd, Denmark	414	262
No. 120 Morgan Stanley		Morgan Stanley in February signed a deal to buy E*TRADE, a pioneer among online brokers. E*TRADE last year spent \$196 million on advertising and market development.		
		New York	409	14
121	L Brands	Columbus, Ohio	408	30
122	Heineken	Amsterdam	404	138
123	Rock Holdings (Quicken Loans)	Detroit	403	311
124	Recruit Holdings Co.	Tokyo	403	208
125	Kimberly-Clark Corp.	Irving, Texas	399	283

103. Bristol-Myers Squibb: Estimated advertising and product promotion expenses. Bought Celgene Corp. in November 2019.



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Ad Age Leading National Advertisers

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

Advertisers 126-150

Rank	Marketer	Headquarters	Total U.S. ad spending 2019	U.S. measured-media ad spending 2019
126	CVS Health Corp.	Woonsocket, R.I.	\$396	\$129
127	Kellogg Co.	Battle Creek, Mich.	393	393
128	Sirius XM Holdings	New York	392	33
129	Wendy's Co.	Dublin, Ohio	391	256
130	Fox Corp.	New York	388	151
131	VF Corp.	Greenwood Village, Colo.	387	45
132	Kering	Paris	381	130
133	Under Armour	Baltimore	374	16
134	United Services Automobile Association	San Antonio	364	264
135	Carnival Corp.	Miami	361	120
No. 136		Signet (Kay Jewelers, Zales, Jared) is cutting its store count and stepping up the retailer's digital efforts in the wake of COVID-19. Signet in June hired Citi veteran Rebecca Wooters as chief digital officer.		
Signet Jewelers		Hamilton, Bermuda	356	220
137	Pernod Ricard	Paris	353	22
138	UnitedHealth Group	Minnetonka, Minn.	352	245
139	TJX Cos.	Framingham, Mass.	344	265
140	Ferrero	Senningerberg, Luxembourg	343	161
141	Dick's Sporting Goods	Coraopolis, Pa.	339	67
142	Boehringer Ingelheim	Ingelheim am Rhein, Germany	329	199
143	Bausch Health Cos.	Laval, Quebec	327	64
144	Norwegian Cruise Lines	Miami	324	131
145	Campbell Soup Co.	Camden, N.J.	321	196
146	FedEx Corp.	Memphis, Tenn.	320	63
147	LG Electronics	Seoul, South Korea	315	66
148	Mattel	El Segundo, Calif.	311	92
149	Mondelez International	Deerfield, Ill.	309	140
150	Charles Schwab Corp.	San Francisco	307	171

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. Full report: AdAge.com/lna2020. Marketer database: AdAge.com/marketertrees2020. About LNA 2020: AdAge.com/aboutlna2020.

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Advertisers 151-175

Rank	Marketer	Headquarters	Total U.S. ad spending 2019	U.S. measured-media ad spending 2019
151	FMR Corp. (Fidelity Investments)	Boston	\$302	\$168
152	Royal Caribbean Cruises	Miami	302	98
153	Hilton Worldwide Holdings	McLean, Va.	301	199
154	PNC Financial Services Group	Pittsburgh	301	58
155	BMW Group	Munich	300	78
156	Mastercard	Purchase, N.Y.	299	52
No. 157 TD Ameritrade Holding Corp.		Charles Schwab (No. 150) in November agreed to buy rival TD Ameritrade. Headquarters of the combined firm will be at Schwab's new campus near Dallas Fort Worth International Airport in Texas.		
		Omaha, Neb.	298	226
158	Sherwin-Williams Co.	Cleveland	282	96
159	Dine Brands Global	Glendale, Calif.	282	208
160	Zurich Insurance Group	Zurich	280	139
161	Tyson Foods	Springdale, Ark.	276	199
162	AARP	Washington	276	126
163	Compagnie Financiere Richemont	Geneva	271	100
164	CarGurus	Cambridge, Mass.	271	96
165	Activision Blizzard	Santa Monica, Calif.	270	57
166	Mazda Motor Corp.	Hiroshima, Japan	270	163
167	Delta Air Lines	Atlanta	267	22
168	Staples	Framingham, Mass.	263	90
169	Nintendo Co.	Kyoto, Japan	263	31
170	Rakuten	Tokyo	262	162
171	News Corp.	New York	259	126
172	Darden Restaurants	Orlando, Fla.	255	191
173	Apollo Education Group (University of Phoenix)	Phoenix	253	144
174	WeatherTech	Bolingbrook, Ill.	251	128
175	Office Depot	Boca Raton, Fla.	249	129

166. Mazda: Estimated ad spending. Estimate based on a revision to Ad Age's spending model. Year ended March 2020.

Ad Age Leading National Advertisers

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

Advertisers 176-200

Rank	Marketer	Headquarters	Total U.S. ad spending 2019	U.S. measured-media ad spending 2019
176	AutoNation	Fort Lauderdale, Fla.	\$248	\$2
177	Danone	Paris	248	87
178	Publix Super Markets	Lakeland, Fla.	245	51
179	Sleep Number Corp.	Minneapolis	242	209
No. 180 NortonLifeLock		Symantec Corp. in 2019 changed its name to NortonLifeLock after selling Symantec enterprise security operations to Broadcom. NortonLifeLock's focus is "cyber safety solutions" for consumers.		
		Tempe, Ariz.	241	164
181	H&R Block	Kansas City, Mo.	238	150
182	Grubhub	Chicago	237	96
183	Experian	Dublin	237	260
184	Altice USA	Long Island City, N.Y.	233	74
185	Hasbro	Pawtucket, R.I.	233	92
186	Chanel	Neuilly-sur-Seine, France	231	126
187	Conagra Brands	Chicago	229	22
188	HP	Palo Alto, Calif.	229	30
189	Telephone & Data Systems (U.S. Cellular)	Chicago	227	42
190	Credit Karma	San Francisco	226	215
191	Chick-fil-A	Atlanta	226	130
192	TripAdvisor	Needham, Mass.	223	267
193	PVH Corp.	New York	220	11
194	Toronto-Dominion Bank (TD Bank Group)	Toronto	219	20
195	Nationwide Mutual Insurance Co.	Columbus, Ohio	218	117
196	Ashley Furniture Industries	Arcadia, Wis.	212	212
197	Southwest Airlines Co.	Dallas	212	35
198	Cimpress (Vistaprint)	Dundalk, Ireland	212	171
199	PayPal Holdings	San Jose, Calif.	211	80
200	Papa John's International	Louisville, Ky.	211	125
Ad Age Leading National Advertisers: Top 200			\$175B	\$69B

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. Full report: AdAge.com/lna2020. Marketer database: AdAge.com/marketertrees2020. About LNA 2020: AdAge.com/aboutlna2020.

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182. Grubhub: Ad spending. Just Eat Takeaway.com in June 2020 signed a deal to buy Grubhub.

190. Credit Karma: Estimated ad spending. Intuit in February 2020 signed a deal to buy Credit Karma.

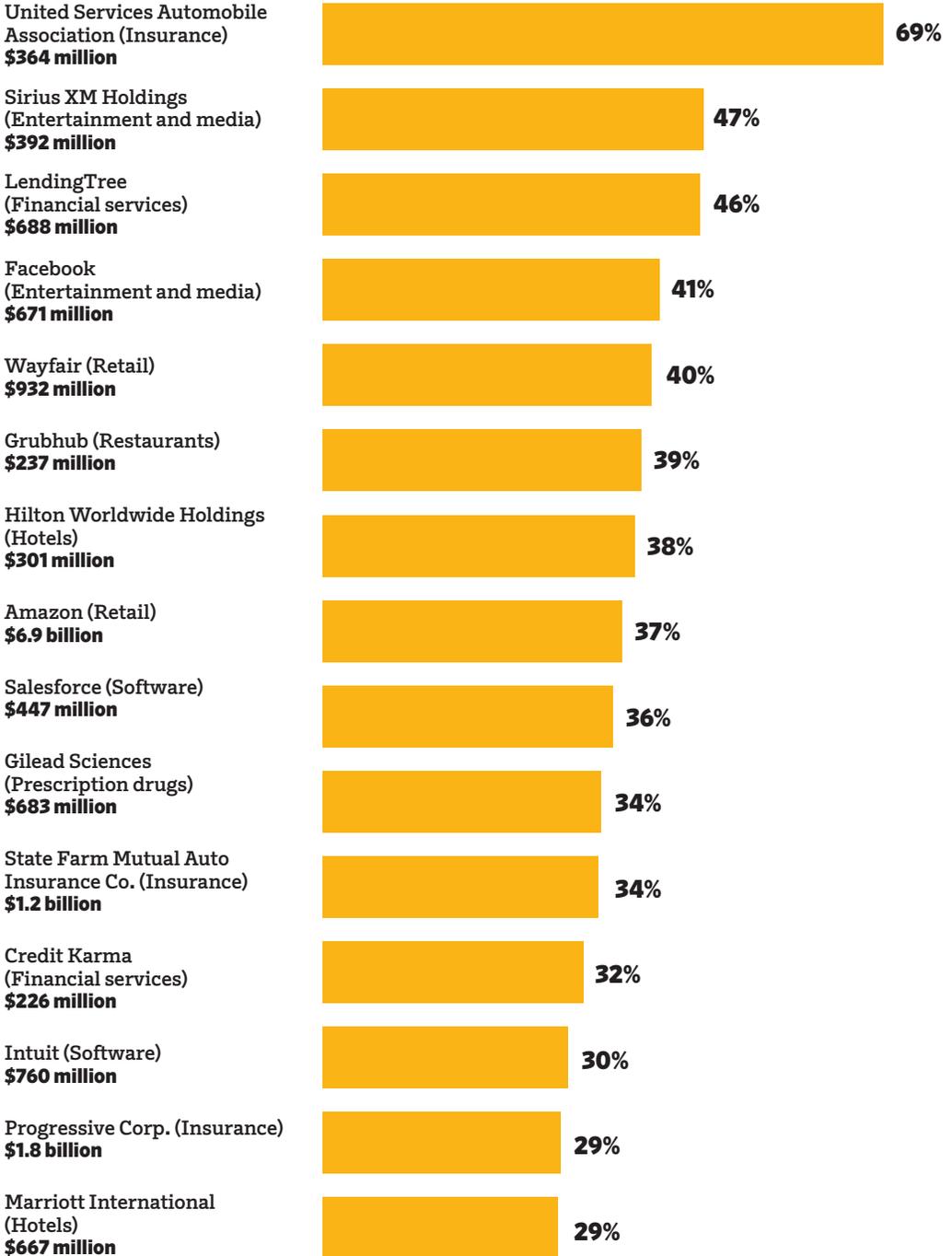
191. Chick-fil-A: Estimated advertising and promotion spending.

Fastest-growing ad spenders

Highest U.S. ad spending growth rates in 2019 among the 200 Leading National Advertisers. Ad spending for insurance seller USAA surged 69 percent, and rivals State Farm and Progressive also rocketed their spending. Amazon's estimated U.S. ad and promotion spending jumped by 37 percent—a \$1.9 billion increase, far and away the biggest dollar increase among marketers. Intuit (QuickBooks, TurboTax, Mint), whose estimated spending rose 30 percent, is buying Credit Karma (purveyor of free credit scores), whose estimated spending increased 32 percent.

Estimated 2019 total U.S. ad spending

Estimated U.S. ad spending growth, 2019 vs. 2018



Source: Ad Age Datacenter estimates. © Copyright 2020 Crain Communications Inc.; see p. 4.

U.S. ad spending forecast

From GroupM. WPP's media agency group expects 2020 ad spending to tumble 12.9 percent (excluding political advertising) and 7.6 percent (including political advertising).

Media ad revenue excluding political advertising

	Spending (dollars in billions)			Year-to-year percent change		
	2021	2020	2019	2021 vs. 2020	2020 vs. 2019	2019 vs. 2018
Pure-play internet	\$117.7	\$105.2	\$107.9	11.8%	-2.5%	19.2%
TV	53.2	52.6	65.0	1.2	-19.1	0.2
Direct mail	13.1	13.4	15.9	-2.4	-15.7	-1.3
Radio	11.2	12.1	16.4	-7.5	-26.4	2.7
Magazine	7.1	8.5	10.8	-16.4	-21.5	-8.5
Out-of-home	7.1	6.6	8.4	7.2	-21.0	8.4
Newspaper	6.5	8.3	12.3	-21.6	-33.1	-11.4
Directories	0.9	1.3	2.1	-33.8	-37.6	-21.7
Total media ad revenue	\$216.6	\$207.9	\$238.8	4.2%	-12.9%	6.8%

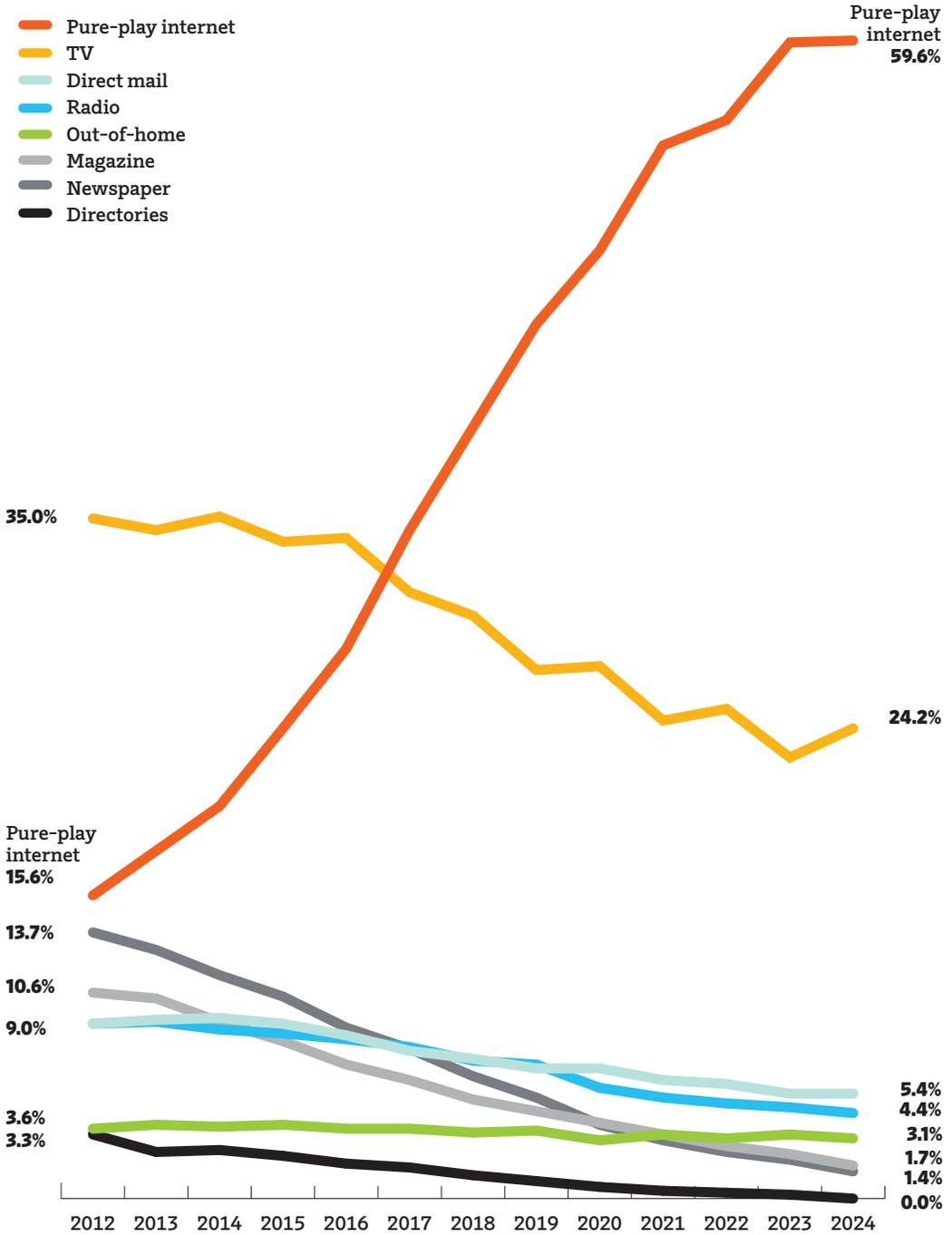
Media ad revenue including political advertising

	Spending (dollars in billions)			Year-to-year percent change		
	2021	2020	2019	2021 vs. 2020	2020 vs. 2019	2019 vs. 2018
Pure-play internet	\$118.8	\$108.7	\$108.6	9.3%	0.1%	18.1%
TV	53.9	61.1	65.7	-11.7	-7.1	-5.5
Direct mail	13.3	15.0	16.1	-11.2	-7.1	-3.6
Radio	11.3	12.7	16.7	-11.1	-23.7	1.0
Magazine	7.2	8.8	10.9	-17.8	-19.5	-9.0
Out-of-home	7.1	6.8	8.5	5.4	-20.5	6.5
Newspaper	6.6	8.5	12.6	-23.0	-31.9	-13.4
Directories	0.9	1.3	2.1	-33.8	-37.6	-21.7
Total media ad revenue	\$219.2	\$222.9	\$241.2	-1.7%	-7.6%	4.0%

Source: WPP's GroupM (This Year Next Year, June 2020). More info: groupm.com. Numbers rounded. Figures for traditional media include their digital extensions.

Share of U.S. ad spending by medium, 2012-2024

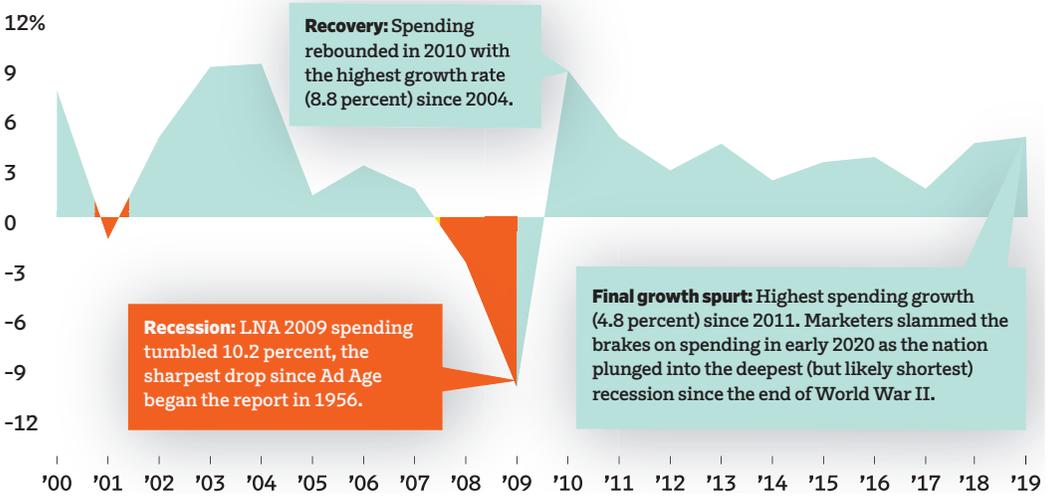
From GroupM, WPP's media agency group expects pure-play internet media properties to account for about 49 percent of U.S. advertising in 2020 and 54 percent next year. When digital extensions of traditional media are factored in, GroupM calculates digital media will account for 56 percent of advertising in 2020 and 61 percent next year.



Source: WPP's GroupM (This Year Next Year, June 2020). More info: groupm.com. Numbers rounded. Media ad revenue including political advertising. Figures for traditional media include their digital extensions.

Ad Age Leading National Advertisers spending growth over time

Percent change in U.S. ad spending for Ad Age's 100 Leading National Advertisers. Total U.S. ad spending in 2019 for the 100 biggest spenders rose 4.8 percent. Ad spending for advertisers ranked 101 through 200 increased 3.6 percent. Spending growth for the 200 Leading National Advertisers: 4.6 percent. Among the top 200 advertisers, 132 increased U.S. spending in 2019.



Source: Ad Age Datacenter. Based on total U.S. ad spending for nation's 100 biggest advertisers. © Copyright 2020 Crain Communications Inc.; see p. 4.

ABOUT AD AGE LEADING NATIONAL ADVERTISERS 2020

Ad Age Datacenter produced the 65th annual Ad Age Leading National Advertisers report.

Ad Age published Ad Age Leading National Advertisers 2020 online on July 13, 2020, available to Ad Age Datacenter subscribers at AdAge.com/lna2020. A portion of the report appears in this Fact Pack.

Ad Age Leading National Advertisers 2020 ranks marketers by total U.S. ad spending as estimated by Ad Age Datacenter.

Total U.S. ad spending estimates come from our top-down analysis of a company's spending on advertising based on disclosures in financial filings, company reports and industry benchmarking. Ad Age weights a company's reported worldwide ad costs to reflect a U.S.-only percentage. Ad Age estimates spending for companies that don't publicly disclose spending.

Total U.S. ad spending encompasses advertising, marketing services (including promotion and direct marketing) and digital marketing (including social media).

Ad Age has based its Leading National Advertisers rankings on a broad definition of advertising and

promotion since the report debuted in 1956.

From the report's launch through the 2016 report, Ad Age defined total U.S. ad spending as the sum of measured-media spending and unmeasured spending.

Essentially, unmeasured spending was the difference between a company's measured media (from Kantar) and its total advertising and promotion costs (either reported by the company or estimated by Ad Age Datacenter).

Starting with the 2017 report, Ad Age eliminated the calculation of unmeasured spending.

Total U.S. ad spending now is based on Ad Age's top-down analysis of a company's estimated spending. Total U.S. ad spending in some cases is lower than U.S. measured-media spending, which comes from Kantar's bottom-up tally of spending in measured media based on rate card, average pricing data supplied by media sellers and other factors. Major advertisers in many cases get significant discounts off rate card. Not all advertisers pay the same rate.

Kantar restated national TV, digital display and desktop search

data for 2018 and 2019. Measured media data in this report may not be comparable with figures published a year ago in Ad Age Leading National Advertisers Fact Pack 2019.

Report methodology and additional information on measured media: AdAge.com/aboutlna2020

Ad Age Datacenter subscribers have exclusive access to expanded data at AdAge.com/lna2020.

Exclusive online content includes:

- **Marketer Trees 2020**, a database with ad spending, brands, profiles, executives and agency rosters for the nation's 100 biggest advertisers
- **Excel downloads** of expanded tables including 200 Leading National Advertisers, 200 most-advertised brands, top ad spenders by medium and biggest ad spending categories

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Measured-media spending

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.

The 200 Leading National Advertisers in 2019 accounted for 62 percent of measured-media TV spending.

Medium	Measured-media spending		200 LNA's share
	All advertisers (including 200 LNA)	200 Leading National Advertisers	
TV	\$74.1	\$46.0	62%
Magazine	12.5	5.5	44
Newspaper	7.0	1.1	16
Radio	7.1	2.9	41
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	26
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

Source: Ad Age Datacenter. Numbers rounded. Measured-media spending from Kantar. More info: kantar.com/media.
About LNA 2020: AdAge.com/aboutlna2020.

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 in this report may not be comparable with figures published a year ago in Ad Age Leading National Advertisers Fact Pack 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.

U.S. measured-media spending for largest categories in 2019

From Kantar for all advertisers (including 200 LNA). Dollars in billions. Including digital media.

Percent change, 2019 vs. 2018. Spending fell in six of the top 10 categories.

Category	Spending (billions)	Percent change
Retail	\$15.5	-5.3%
Telecom, internet services, internet service providers	\$13.7	+12.5%
General services	\$12.2	+0.2%
Automotive	\$11.7	-8.4%
Medicine and remedies	\$10.1	-6.1%
Financial services	\$8.2	-0.3%
Insurance	\$7.8	+8.5%
Airlines, hotels, car rental and travel	\$6.9	+3.0%
Food, beverages and candy	\$6.7	-9.9%
Restaurants	\$6.2	-2.9%

Source: Ad Age Datacenter analysis of data from Kantar. More info: kantar.com/media.
Expanded table including 2018 spending: AdAge.com/lna2020. About LNA 2020: AdAge.com/aboutlna2020.

The background is a complex, three-dimensional grid of lines. The lines are colored in shades of green and purple, creating a vibrant, multi-colored mesh. The grid is curved, suggesting a spherical or hemispherical shape, and the lines are closely spaced, creating a dense, textured appearance. The overall effect is one of depth and complexity, with the lines converging towards a central point on the left side of the image.

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Now more than ever, the marketing world needs cookie-free media and measurement.

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Biggest U.S. spenders by medium

10 largest advertisers by 2019 U.S. measured-media spending. Dollars in millions.

Broadcast network TV

Measured broadcast network TV ad spending.

Rank	Marketer	2019
1	Procter & Gamble Co.	\$781
2	T-Mobile US	692
3	AT&T	470
4	Amazon	470
5	Berkshire Hathaway	395
6	General Motors Co.	376
7	Apple	358
8	Verizon Communications	338
9	AbbVie	328
10	Pfizer	328
Total (dollars in billions)		\$20.4

Cable TV networks

Measured cable TV networks ad spending.

Rank	Marketer	2019
1	Procter & Gamble Co.	\$933
2	Berkshire Hathaway	696
3	T-Mobile US	611
4	PepsiCo	583
5	AT&T	560
6	Amazon	532
7	AbbVie	466
8	Yum Brands	462
9	Walt Disney Co.	458
10	Comcast Corp.	380
Total (dollars in billions)		\$34.4

Broadcast spot TV

Measured broadcast spot TV ad spending.

Rank	Marketer	2019
1	Comcast Corp.	\$348
2	General Motors Co.	315
3	Charter Communications	265
4	Nissan Motor Co.	264
5	Ford Motor Co.	225
6	Fiat Chrysler Automobiles	156
7	Toyota Motor Corp.	131
8	Volkswagen	123
9	Berkshire Hathaway	118
10	AT&T	115
Total (dollars in billions)		\$15.1

Radio

Measured network, national spot and local radio ad spending.

Rank	Marketer	2019
1	T-Mobile US	\$220
2	Comcast Corp.	170
3	Berkshire Hathaway	135
4	Procter & Gamble Co.	119
5	AT&T	101
6	Home Depot	89
7	Walt Disney Co.	88
8	Fiat Chrysler Automobiles	72
9	iHeartMedia	70
10	U.S. Government	69
Total (dollars in billions)		\$7.1

Source: Rankings based on Ad Age Datacenter analysis of U.S. measured-media data from Kantar. More info: kantar.com/media.

See expanded tables including 2018 spending: AdAge.com/lna2020. About LNA 2020: AdAge.com/aboutlna2020.

Numbers rounded. Ad Age aggregated media by type. Total is medium's U.S. total for all advertisers (including 200 Leading National Advertisers). Spending for advertisers is pro forma reflecting acquisitions and divestitures.

Broadcast network TV, broadcast spot TV and cable TV networks include Spanish-language TV. Radio excludes satellite radio.

More in Ad Age Datacenter
Expanded tables for biggest U.S.
ad spenders by medium
AdAge.com/Ina2020

Desktop search

Measured desktop search ad spending.

Rank	Marketer	2019
1	Expedia Group	\$802
2	Booking Holdings	666
3	Amazon	410
4	LendingTree	312
5	AT&T	206
6	TripAdvisor	204
7	Progressive Corp.	204
8	Verizon Communications	183
9	IAC (IAC/InterActiveCorp)	170
10	Experian	165
Total (dollars in billions)		\$24.4

Desktop internet display

Measured desktop internet display ad spending.

Rank	Marketer	2019
1	Amazon	\$202
2	Golf Pipeline Corp.	194
3	Comcast Corp.	193
4	Motley Fool	186
5	Squarespace	162
6	Viking Direct	135
7	Berkshire Hathaway	124
8	U.S. Government	86
9	ViacomCBS	86
10	Verizon Communications	77
Total (dollars in billions)		\$11.7

Magazine

Measured magazine ad spending.

Rank	Marketer	2019
1	L'Oréal	\$617
2	Procter & Gamble Co.	405
3	Kraft Heinz Co.	266
4	Nestlé	203
5	LVMH Moët Hennessy Louis Vuitton	197
6	Berkshire Hathaway	187
7	Johnson & Johnson	176
8	Merck & Co.	172
9	AbbVie	149
10	General Motors Co.	146
Total (dollars in billions)		\$12.5

Outdoor

Measured outdoor ad spending.

Rank	Marketer	2019
1	Comcast Corp.	\$89
2	AT&T	86
3	Walt Disney Co.	77
4	Apple	69
5	McDonald's Corp.	62
6	ViacomCBS	58
7	Berkshire Hathaway	53
8	T-Mobile US	53
9	Amazon	52
10	State Farm Mutual Auto Insurance Co.	44
Total (dollars in billions)		\$5.6

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 in this report may not be comparable with figures published a year ago in Ad Age Leading National Advertisers Fact Pack 2019.

Desktop search is spending on paid search. Includes only U.S. Google desktop text ads.

Desktop internet display excludes paid video.

Magazine includes consumer, Sunday, local, Spanish-language and business-to-business magazines.

10 most-advertised brands

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

More in Ad Age Datacenter
200 most-advertised brands
[AdAge.com/lna2020](https://www.adage.com/lna2020)

1. Geico
Berkshire Hathaway
+9%



6. State Farm
State Farm Mutual
Auto Insurance Co.
+28%

2. Amazon
Amazon
+34%



7. T-Mobile
T-Mobile US
+6%

3. Progressive
Progressive Corp.
+5%



8. Chevrolet
General Motors Co.
-8%

4. Verizon
Verizon
Communications
+5%



9. Capital One
Capital One
Financial Corp.
-2%

5. AT&T
AT&T
+36%



10. Apple
Apple
-8%

Source: Ad Age Datacenter analysis of 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). About LNA 2020: [AdAge.com/aboutlna2020](https://www.adage.com/aboutlna2020).

U.S. market leaders by category

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

More in Ad Age Datacenter
200 most-advertised brands
AdAge.com/Ina2020

Retailers

Rankings based on total U.S. ad spending.

Rank	Marketer	Share of U.S. retail sales		Total U.S. ad spending	
		2019	2018	2019	2018
1	Amazon	3.9%	3.4%	\$6,879	\$5,029
2	Walmart	10.7	10.8	2,753	2,604
3	Target Corp.	2.1	2.1	1,647	1,494
4	Macy's	0.7	0.7	1,330	1,358
5	Kohl's Corp.	0.5	0.5	1,156	1,133
6	Home Depot	2.7	2.8	1,090	1,062
7	Wayfair	0.2	0.2	932	664
8	Kroger Co.	3.3	3.4	854	752
9	Lowe's Cos.	1.8	1.9	811	890
10	Best Buy Co.	1.1	1.1	772	712
	Top 10	27.1	27.0	\$18,224	\$15,697
	Industry total (*U.S. sales, dollars in trillions)	\$3.7*	\$3.5*	NA	NA

Restaurant chains

U.S. market share based on systemwide sales.

Rank	Chain	Marketer	Market share		Measured media	
			2019	2018	2019	2018
1	McDonald's	McDonald's Corp.	7.0%	6.9%	\$624	\$671
2	Starbucks	Starbucks Corp.	3.7	3.5	72	78
3	Chick-fil-A	Chick-fil-A	2.0	1.8	130	106
4	Taco Bell	Yum Brands	2.0	1.9	383	420
5	Burger King	Restaurant Brands International	1.8	1.8	372	358
6	Subway	Doctor's Associates	1.8	1.9	219	304
7	Wendy's	Wendy's Co.	1.7	1.7	256	282
8	Dunkin'	Dunkin' Brands Group	1.6	1.6	176	142
9	Domino's	Domino's Pizza	1.2	1.2	467	431
10	Panera Bread	Pret Panera Holding Co.	1.0	1.0	70	63
	Top 10		23.7	23.3	2,768	2,852
	Industry total (*U.S. sales, dollars in billions)		\$578*	\$556*	\$6,162	\$6,345

Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar. More info: kantar.com/media. Numbers rounded. About LNA 2020: AdAge.com/aboutlna2020. © Copyright 2020 Crain Communications Inc.; see p. 4.

Retailers: Census Bureau (U.S. retail sales). More info: census.gov. Industry total (U.S. sales): From Census Bureau's Monthly Retail Trade Survey; U.S. retail sales excluding motor-vehicle and parts dealers, gas stations and fuel dealers. Amazon: Share shown is Ad Age Datacenter estimate.

Restaurant chains: Technomic 2020 Top 500 Chain Restaurant Report (sales used to calculate market share). More info: technomic.com. Systemwide sales is franchised plus company-owned restaurants. Chick-fil-A, Panera Bread and Starbucks based on estimated sales. Pret Panera Holding Co. is owned by JAB Holding Co.

U.S. market leaders by category

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

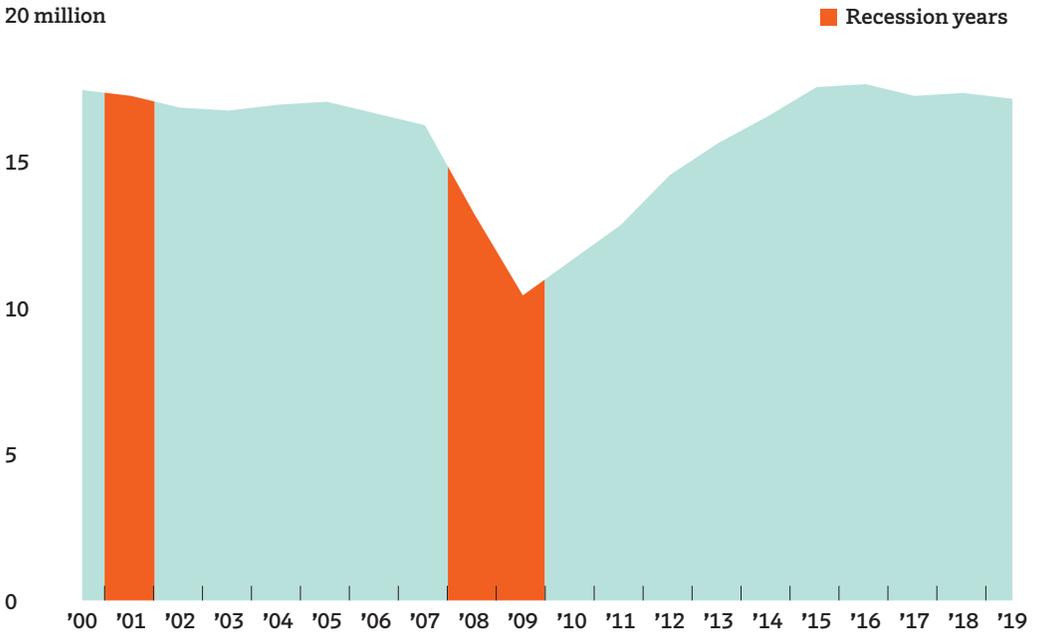
Auto marketers

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

Rank	Marketer	Market share		Total U.S. ad spending	
		2019	2018	2019	2018
1	General Motors Co.	16.9%	17.1%	\$2,952	\$3,139
2	Ford Motor Co.	14.1	14.3	2,280	2,434
3	Toyota Motor Corp.	13.9	14.0	1,508	1,548
4	Fiat Chrysler Automobiles	12.9	13.0	2,053	2,129
5	Honda Motor Co.	9.4	9.3	1,390	1,325
6	Nissan Motor Co.	7.9	8.6	990	1,069
7	Hyundai Motor Co.	4.2	3.9	627	560
8	Subaru Corp.	4.1	3.9	523	497
9	Volkswagen	3.8	3.7	777	728
10	Kia Motors Corp.	3.6	3.4	534	544
	Top 10	90.7	91.2	\$13,633	\$13,973
	Industry total (*vehicles sold in millions)	17.1*	17.3*	NA	NA

U.S. light-vehicle sales

Automakers sold 17.1 million new cars and light trucks in 2019, down 1.2 percent from 2018.



Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar. More info: kantar.com/media. Numbers rounded. About LNA 2020: AdAge.com/aboutlna2020. © Copyright 2020 Crain Communications Inc.; see p. 4.

Auto marketers: Market share calculations by Ad Age Datacenter based on sales figures from Automotive News Data Center. More info: autonews.com. Market share for cars and light trucks. Total U.S. ad spending for automakers. Excludes dealer advertising. Hyundai Motor Co.: Owns 33.9% of Kia Motors Corp.

U.S. light-vehicle sales: Automotive News Data Center. More info: autonews.com.

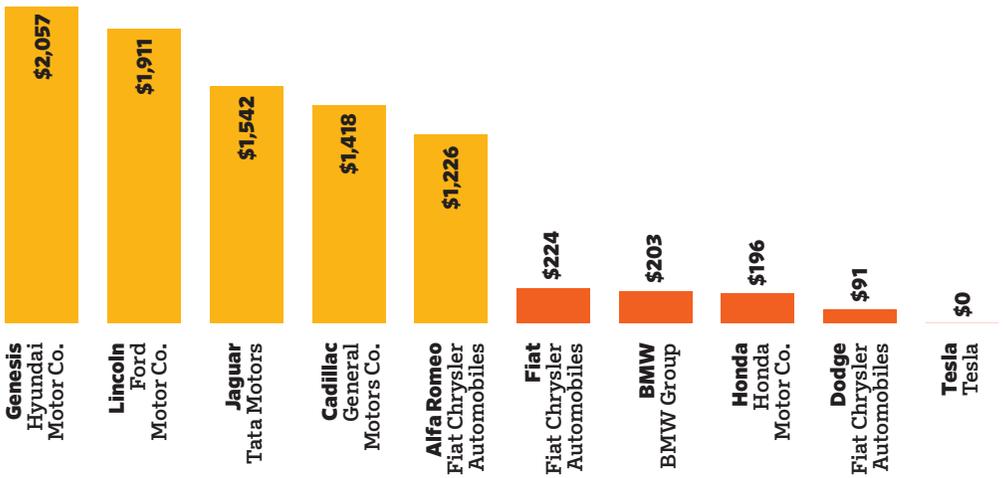
Auto brands

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

Rank	Brand	Marketer	Market share		Measured media	
			2019	2018	2019	2018
1	Ford	Ford Motor Co.	13.4%	13.8%	\$520	\$647
2	Toyota	Toyota Motor Corp.	12.2	12.3	522	495
3	Chevrolet	General Motors Co.	11.5	11.8	693	756
4	Honda	Honda Motor Co.	8.5	8.3	284	406
5	Nissan	Nissan Motor Co.	7.2	7.8	503	482
6	Jeep	Fiat Chrysler Automobiles	5.4	5.6	287	323
7	Ram	Fiat Chrysler Automobiles	4.1	3.4	191	271
8	Subaru	Subaru Corp.	4.1	3.9	322	324
9	Hyundai	Hyundai Motor Co.	4.0	3.9	311	283
10	Kia	Kia Motors Corp.	3.6	3.4	279	286
Top 10			73.9	74.2	3,913	4,274
Industry total (*vehicles sold in millions)			17.1*	17.3*	\$6,493	\$7,201

Ad spending per vehicle sold

Top and bottom five spenders based on 2019 U.S. measured-media spending divided by vehicles sold. Ad spending for Hyundai Motor Co.'s Genesis came to \$2,057 per vehicle sold in 2019 (compared to \$4,006 per Genesis car sold in 2018). Tesla spent just 14 cents on measured media to sell each vehicle. Tesla disclosed 2019 worldwide “marketing, promotional and advertising costs” of \$27 million—a miniscule 0.1 percent of revenue. Tesla’s most recent annual regulatory filing said: “Media coverage and word of mouth are the current primary drivers of our sales leads and have helped us achieve sales without traditional advertising and at relatively low marketing costs.”



Auto brands: Market share calculations by Ad Age Datacenter based on sales figures from Automotive News Data Center. More info: autonews.com. Market share for cars and light trucks. U.S. measured-media spending. Includes all of automaker’s measured-media advertising for that brand; excludes dealer advertising. Industry total: Ad spending is measured-media spending for automakers.

Ad spending per vehicle sold: Calculated by Ad Age Datacenter using Kantar U.S. measured-media spending and Automotive News U.S. sales data. More info: autonews.com. Analysis based on brands selling at least 5,000 vehicles in U.S. in 2019. Ad spending is automaker’s U.S. measured-media spending for that brand.

U.S. market leaders by category

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

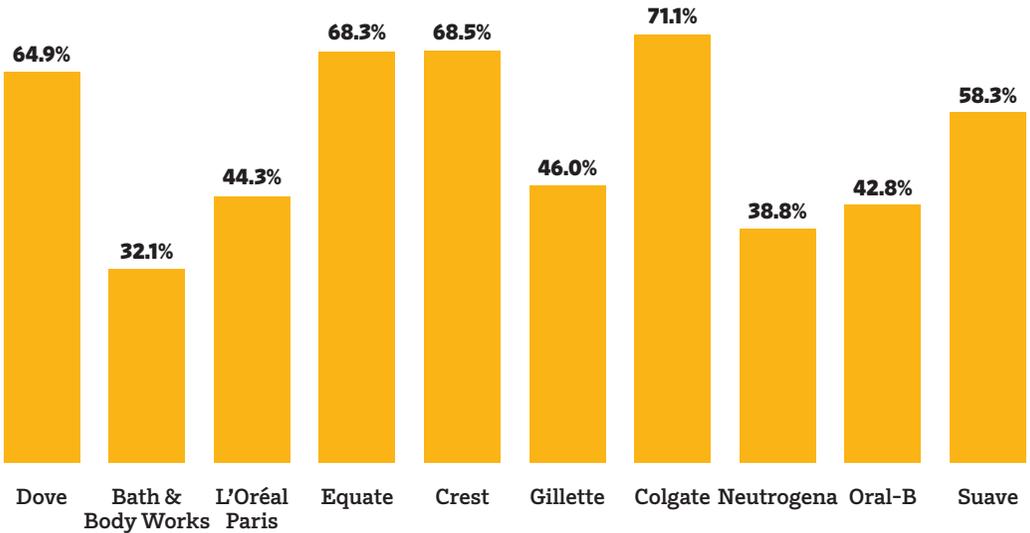
Personal care brands

U.S. market share for personal care brands. Walmart’s private-label Equate is the No. 4-selling personal care brand.

Rank	Brand	Marketer	Market share		Measured media	
			2019	2018	2019	2018
1	Dove	Unilever	3.1%	2.8%	\$197	\$190
2	Bath & Body Works	L Brands	2.7	2.5	2	1
3	L’Oréal Paris	L’Oréal	2.4	2.6	495	542
4	Equate	Walmart	2.3	2.1	0	0
5	Crest	Procter & Gamble Co.	2.2	2.1	117	140
6	Gillette	Procter & Gamble Co.	2.1	2.3	115	131
7	Colgate	Colgate-Palmolive Co.	2.1	2.1	108	106
8	Neutrogena	Johnson & Johnson	1.7	1.7	196	188
9	Oral-B	Procter & Gamble Co.	1.4	1.3	40	43
10	Suave	Unilever	1.3	1.3	30	13
Top 10			21.4	20.9	1,300	1,353
Total personal care measured-media spending			100.0%	100.0%	\$5,076	\$5,680

Personal care brands: Household penetration

Household penetration in 2019 for top 10-selling personal care brands (the same brands as shown at top of page). Nearly seven in 10 homes use Walmart’s Equate brand.



Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar. More info: kantar.com/media. Numbers rounded. About LNA 2020: AdAge.com/aboutlna2020. © Copyright 2020 Crain Communications Inc.; see p. 4.

Personal care brands: U.S. market share and household penetration from Numerator. Market share calculated by dividing brand’s projected dollars by total projected dollars for category. Household penetration calculated by dividing number of unique households that purchased brand by number of households in panel. Both metrics based on panel of 100,000 households weighted and balanced against U.S. Census. More info: numerator.com. Total personal care measured-media spending based on Kantar’s industry classifications for Cosmetics & Beauty Aids (D100); Personal Hygiene & Health (D200); Hair Products & Accessories (D300); and Men’s Toiletries, Hygienic Goods & Skin Care (D400).

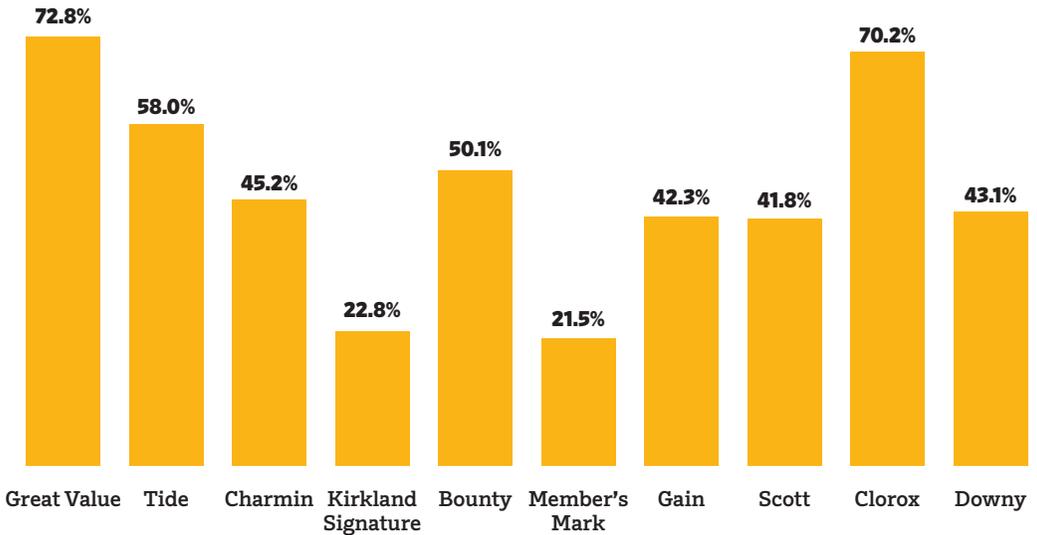
Household product brands

U.S. market share for household product brands. Walmart's Great Value is the No. 1-selling household product brand. Kirkland Signature (Costco) and Member's Mark (Walmart-owned Sam's Club) rank No. 4 and No. 6, respectively.

Rank	Brand	Marketer	Market share		Measured media	
			2019	2018	2019	2018
1	Great Value	Walmart	5.0%	4.6%	\$0	\$0
2	Tide	Procter & Gamble Co.	4.4	4.2	197	207
3	Charmin	Procter & Gamble Co.	3.7	3.7	112	90
4	Kirkland Signature	Costco Wholesale Corp.	3.1	2.9	0	0
5	Bounty	Procter & Gamble Co.	3.0	3.1	136	97
6	Member's Mark	Walmart (Sam's Club)	2.8	2.8	0	0
7	Gain	Procter & Gamble Co.	2.4	2.5	97	120
8	Scott	Kimberly-Clark Corp.	2.4	2.2	3	15
9	Clorox	Clorox Co.	2.2	2.3	80	85
10	Downy	Procter & Gamble Co.	2.1	1.9	160	175
Top 10			31.1	30.1	786	790
Total household product measured-media spending			100.0%	100.0%	\$2,084	\$2,095

Household product brands: Household penetration

Household penetration in 2019 for top 10-selling household product brands (the same brands as shown at top of page). More than seven in 10 homes use Walmart's Great Value brand. More than one in five homes use household products from Kirkland Signature (Costco) or Member's Mark (Walmart-owned Sam's Club).



Household product brands: U.S. market share and household penetration from Numerator. Market share calculated by dividing brand's projected dollars by total projected dollars for category. Household penetration calculated by dividing number of unique households that purchased brand by number of households in panel. Both metrics based on panel of 100,000 households weighted and balanced against U.S. Census. More info: numerator.com. Total household product measured-media spending based on Kantar's industry classifications for Household Supplies (H300); and Household Soaps, Cleansers & Polishes (H400).

U.S. market leaders by category

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

Beverage brands

U.S. market share based on sales volume.

Rank	Brand	Marketer	Market share		Measured media	
			2019	2018	2019	2018
1	Coke	Coca-Cola Co.	11.5%	11.6%	\$283	\$345
2	Pepsi	PepsiCo	4.9	5.1	224	219
3	Mountain Dew	PepsiCo	3.5	3.7	119	116
4	Dr Pepper	Keurig Dr Pepper	3.4	3.5	91	93
5	Gatorade	PepsiCo	3.4	3.4	134	129
6	Sprite	Coca-Cola Co.	2.8	2.8	32	38
7	Nestlé Pure Life	Nestlé	2.7	3.1	10	8
8	Poland Spring	Nestlé	2.4	2.5	8	3
9	Dasani	Coca-Cola Co.	2.0	2.2	0	0
10	Aquafina	PepsiCo	1.7	1.8	0	1
Top 10			38.4	39.6	901	951
Industry total (*gallons in billions)			34.3*	33.9*	\$1,812	\$1,853

Beer marketers

U.S. market share based on shipment volume.

Rank	Marketer	Market share		Measured media	
		2019	2018	2019	2018
1	Anheuser-Busch InBev (Budweiser)	39.7%	40.8%	\$428	\$460
2	Molson Coors Beverage Co. (Coors, Miller)	22.3	23.3	218	299
3	Constellation Brands (Modelo, Corona)	10.9	10.3	359	354
4	Heineken	3.4	3.6	138	141
5	Boston Beer Co. (Samuel Adams)	2.6	2.1	58	72
6	Mark Anthony Group (Mike's Hard Lemonade)	2.5	1.3	9	7
7	Pabst Brewing Co.	1.8	2.0	0	1
8	Diageo (Guinness)	1.3	1.2	17	14
9	D.G. Yuengling & Son	1.2	1.3	9	10
10	Florida Ice and Farm Co. (Genesee, Labatt)	1.1	1.1	0	2
Top 10		86.9	87.0	1,237	1,360
Industry total (*barrels in millions)		206.2*	205.6*	\$1,290	\$1,400

Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar. More info: kantar.com/media. Numbers rounded. About LNA 2020: AdAge.com/aboutlna2020. © Copyright 2020 Crain Communications Inc.; see p. 4.

Beverage brands: Beverage Marketing Corp. More info: beveragemarketing.com. Market share data for refreshment beverages based on U.S. sales volume in gallons. Brand includes brand extensions (Coke, for example, includes Coca-Cola, Coca-Cola Zero Sugar and Diet Coke).

Beer marketers: Beer Marketer's Insights (U.S. market share, U.S. industry sales). More info: beerinsights.com. Ranked based on U.S. shipments (barrels). U.S. measured-media spending for marketers' beer brands. Industry total: Beer barrel equals 31 gallons. Selected brands shown. Florida Ice and Farm Co.: Parent of FIFCO USA.

Prescription drug brands

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

Rank	Brand	Marketer	Share of ad spending		Measured media	
			2019	2018	2019	2018
1	Humira	AbbVie	8.7%	8.1%	\$556	\$495
2	Xeljanz	Pfizer	3.4	4.0	214	244
3	Dupixent	Sanofi	3.3	2.3	210	138
4	Chantix	Pfizer	3.1	3.2	195	195
5	Ozempic	Novo Nordisk	2.8	1.3	180	82
6	Eliquis	Bristol-Myers Squibb Co.	2.7	3.2	174	196
7	Emgality	Eli Lilly & Co.	2.7	0.1	169	4
8	Otezla	Amgen	2.6	3.3	168	199
9	Trulicity	Eli Lilly & Co.	2.5	3.2	161	194
10	Cosentyx	Novartis	2.5	3.0	159	185
Top 10			34.3	31.6	2,186	1,933
Total prescription drug measured-media spending			100.0%	100.0%	\$6,368	\$6,110

Wireless services

U.S. market share for wireless service providers.

Rank	Marketer	Market share		Measured media	
		2019	2018	2019	2018
1	Verizon Communications	33.4%	32.9%	\$612	\$604
2	T-Mobile US plus Sprint Corp. (including Boost Mobile and Sprint prepaid)	29.4	27.3	1,684	1,709
	T-Mobile US	18.1	16.3	1,012	1,006
	Sprint Corp. (Sprint)	8.7	8.2	458	509
	Sprint Corp. (Boost Mobile, Sprint prepaid)	2.6	2.9	214	195
3	AT&T	28.2	30.1	624	457
4	América Móvil (Tracfone Wireless)	6.4	7.0	227	260
5	Telephone and Data Systems (U.S. Cellular)	1.4	1.4	41	38
Top 5		98.9	98.8	3,187	3,069
Other		1.1	1.2	1,269	1,320
Total wireless services measured-media spending		100.0%	100.0%	\$4,457	\$4,389

Prescription drug brands: Ad Age Datacenter analysis of U.S. measured-media spending. Share of advertising and industry total category ad spending based on Kantar's industry classifications for prescription drugs and pharmaceutical houses. Bristol-Myers Squibb on Nov. 20, 2019, bought Celgene Corp. In connection with that deal, Celgene on Nov. 21, 2019, sold global rights for Otezla to Amgen.

Wireless services: U.S. network operator market share based on survey data from Comscore MobiLens, Total Audience, three months ended December 2019 and December 2018. More info: comscore.com. Ad spending for companies' wireless services. Industry total spending includes ad spending by major phone suppliers (including Apple and Samsung Electronics). América Móvil: Tracfone Wireless including Tracfone and other brands. AT&T: Including Cricket. T-Mobile US: Including Metro by T-Mobile. T-Mobile US on April 1, 2020, bought Sprint Corp. In a related transaction, T-Mobile US on July 1, 2020, sold Sprint Corp.'s Boost Mobile and the Sprint prepaid business to DISH Network Corp.

U.S. market leaders by category

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

More in Ad Age Datacenter
200 most-advertised brands
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Insurance brands

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

Rank	Brand	Marketer	Share of ad spending		Measured media	
			2019	2018	2019	2018
1	Geico	Berkshire Hathaway	20.8%	20.6%	\$1,618	\$1,478
2	Progressive	Progressive Corp.	13.7	14.2	1,067	1,016
3	State Farm	State Farm Mutual Automobile Insurance Co.	10.3	8.7	802	627
4	Allstate	Allstate Corp.	5.6	5.5	437	398
5	Liberty Mutual	Liberty Mutual Insurance Co.	5.6	5.2	435	373
6	USAA	United Services Automobile Association	3.4	2.5	264	177
7	UnitedHealthcare	UnitedHealth Group	2.9	2.8	225	204
8	The General	American Family Mutual Insurance Co.	1.9	2.1	151	151
9	Farmers Insurance	Zurich Insurance Group	1.6	1.9	126	135
10	Nationwide	Nationwide Mutual Insurance Co.	1.5	2.1	117	148
Top 10			67.3	65.6	5,240	4,707
Total insurance industry measured-media spending			100.0%	100.0%	\$7,790	\$7,179

Credit cards

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

Rank	Marketer	Market share		Measured media	
		2019	2018	2019	2018
1	JPMorgan Chase & Co. (Chase)	20.4%	20.1%	\$81	\$66
2	American Express Co.	20.2	20.5	177	214
3	Citigroup (Citibank)	11.2	11.1	82	82
4	Bank of America Corp.	9.6	9.8	11	1
5	Capital One Financial Corp.	9.3	9.2	402	449
6	U.S. Bancorp (U.S. Bank)	3.9	4.0	0	1
7	Discover Financial Services	3.7	3.8	271	263
8	Wells Fargo & Co.	3.5	3.7	3	1
9	Barclays	2.1	2.2	16	40
10	Synchrony Financial	1.4	1.5	3	3
Top 10		85.4	85.8	1,047	1,120
Industry total (*purchase volume, dollars in trillions)		\$4.0*	\$3.7*	\$1,394	\$1,485

Source: Total U.S. ad spending from Ad Age Datacenter. U.S. measured-media spending from Kantar.
More info: kantar.com/media. Numbers rounded. About LNA 2020: AdAge.com/aboutlna2020.
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Insurance brands: Ad Age Datacenter analysis of U.S. measured-media spending. Measured spending includes all of company's advertising for that brand. Share shown is spending on brand (including all of company's advertising for that brand) as percentage of industry total spending (based on ad spending for Kantar's industry classifications for life, medical and dental, homeowners and personal property, automobile and business insurance).

Credit cards: The Nilson Report. More info: nilsonreport.com. Market share of general purpose credit cards based on total purchase volume (spending at merchants for goods and services) in dollars for U.S. credit card issuers. U.S. measured-media spending for companies' credit cards; ad spending shown does not include direct mail, a key form of marketing in this category. Industry total measured-media spending on credit cards for credit card issuers; excludes Mastercard Inc. and Visa Inc., whose customers are banks that issue cards.

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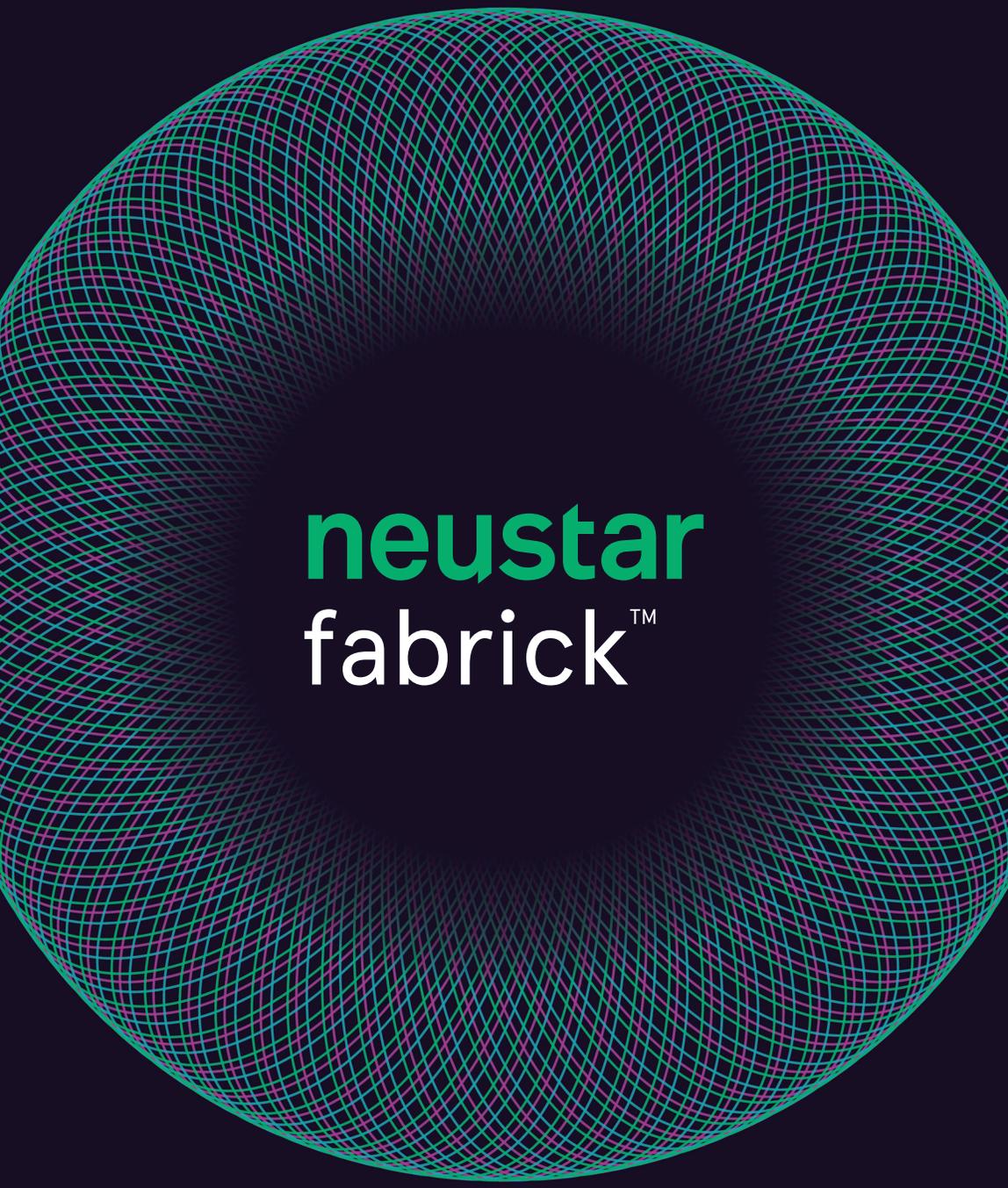
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