

A SUPPLEMENT TO
AdvertisingAge

FACT 2005 PACK

3RD ANNUAL
GUIDE TO
ADVERTISING
& MARKETING

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FACT PACK

TOP LINE DATA ON THE ADVERTISING AND MEDIA INDUSTRIES

WHO ARE THE TOP marketers by ad spending in the U.S. and on a global basis? What ads are the hottest and which TV shows command the highest prices for a :30 spot? Who are the big marketing organizations and how do their agency brands stack up against their competition? How big and far-reaching are those multifaceted media giants? It's all in the FactPack, whether in print form on your desk, or a click away on your computer or network.

The FactPack is presented in three sections:

Advertising and Marketing section data were taken from Advertising Age's 49th annual 100 Leading National Advertisers, and the publication's 200 Megabrand and Global Marketing reports. The 100 Leading National Advertisers report breaks out total ad spending by media for the largest U.S. advertisers and adds an Ad Age-proprietary unmeasured number to media spending for a comprehensive U.S. ad total. The LNA report also charts the hotly contested industry categories by market share and brand spending.

The Media section's primary sources are the 100 Leading Media Companies, an annual ranking of the nation's media companies by net revenue, and the Ad Age Magazine 300 report, an annual ranking by gross revenue of advertising and circulation combined that determines the 300 top magazines.

The Agency Report section, in its 60th version, ranks nearly 500 U.S. agency brands, the world's top agency brands, the world's top 50 marketing organizations, and the top media specialist companies.

NEW THIS YEAR

New to the FactPack this year are charts that show the big advertisers in rapidly growing Spanish-language TV, TV syndication's leading shows by ad revenue, the nation's top newspapers by circulation, media companies that generate the most revenue from free-standing inserts, and the telecommunications hierarchy by net revenue from their directory divisions.

FREE DIGITAL EDITION

A free pdf edition of the FactPack can be downloaded using Adobe Acrobat. Go to AdAge.com and use **QwikFIND aaq31n**. Where indicated, a more comprehensive ranking is posted on AdAge.com and can be purchased.

TO REACH US

By email: DataCenter@AdAge.com; AdAge.com Editor@AdAge.com; Postal mail: Advertising Age, 711 Third Ave., New York, N.Y. 10017; Phone: (212) 210-0100. Subscription and print single copy sales (888) 288-5900; Advertising (212) 210-0159; Library services (312) 649-5476. DataCenter staff: R. Craig Endicott, Kevin Brown, Scott MacDonald, Mark Schumann, Mike Ryan, Jennie Sierra.

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and keeping it?**

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ADVERTISING AGE INTERACTIVE

AdAge.com

Advertising Age's Web site, updated daily.

Ad Age's AgencyPreview.com, in cooperation with AdForum.com. The largest searchable database of U.S. agencies on the Web.

MadisonandVine.com

The hottest site covering the convergence of entertainment and advertising.

To advertise, contact Allison Arden at 212-210-0794 or aarden@crain.com



AD AGE CUSTOM PROGRAMS

The Ad Age Group's Custom Programs offer a wide variety of options to tailor your message to a specific market.

Contact Chiqui Cartagena at 212-210-0156 or ccartagena@crain.com



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The Ad 75 Age GroupTM
YEARS OF IDEAS

ADVERTISING & MARKETING

Top U.S. marketer by ad expenditures

GENERAL MOTORS HITS \$3.43 BILLION

Top U.S. megabrand

VERIZON REACHES \$1.18 BILLION

Biggest U.S. ad medium

DIRECT MAIL DRAWS \$48.37 BILLION

Top global marketer by ad spending

PROCTER & GAMBLE SPENDS \$5.76 BILLION

Content, sources for marketer rankings

AD SPENDING BY THE WORLD'S TOP MARKETERS, from media tracked by domestic and global monitoring services to estimated non-media totals developed by Ad Age, is the thrust of this Advertising & Marketing section.

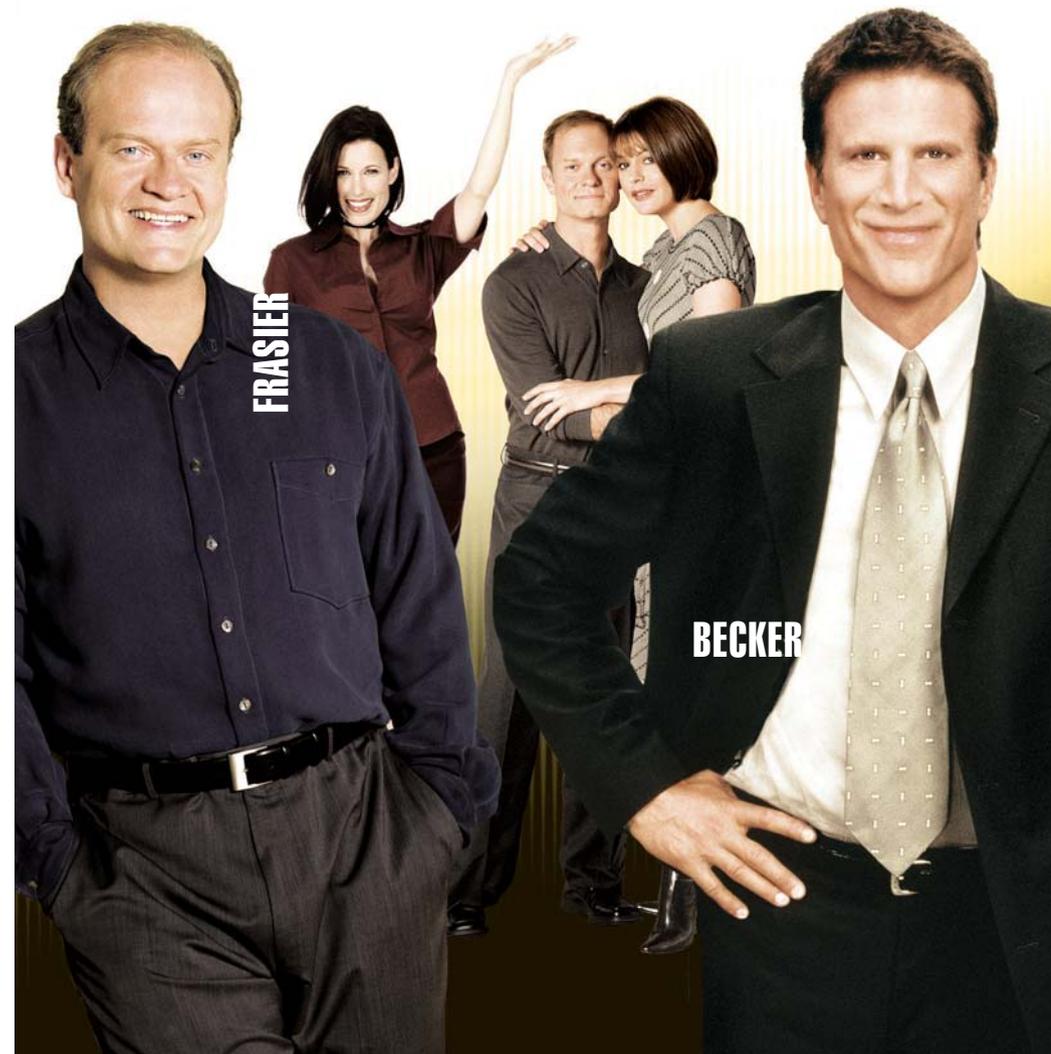
U.S. spending for the top U.S. marketers (Page 12) is a composite of media advertising measured in 13 national consumer media by TNS Media Intelligence, Yellow Pages from Yellow Pages Integrated Media Assn., and unmeasured spending (direct mail, promotion, co-op, coupons, etc.,) estimated by Ad Age.

The 100 Leading National Advertisers report (AA, June 28, 2004) further breaks out a marketer's dollar totals by ad medium and presents the methodology used to estimate unmeasured tallies. That same report isolates by media spending and share data competitive battles in major categories: Autos and beer (Page 20), limited service and casual dining (Page 21), men's toiletries (Page 22), top retailers (Page 23) and more.

Global marketers data (Pages 18-19) are provided by TNS, Nielsen Media Research, Ibope and others in 80 global markets.

Two reports a year feature top brands based on media spending from TNS that Ad Age collates into "megabrands," all brands, products and services bearing the same name. Spending by the top 200 megabrands (Page 13) account for one-third of all U.S. measured spending. A brand required media expenditures of \$77.6 million to make the top 200 list.

Comedies with adult appeal
have one thing in common.
They're built around appealing adults.



MAJOR ACCOUNTS AND AGENCIES FOR THE FIVE LARGEST U.S. MARKETERS

PRIMARY AGENCIES COLOR CODED BY PARENT COMPANY

1. General Motors Corp.

Buick Motor Division

McCann Erickson Worldwide

Cadillac Motor Car Division

chemistri

Chevrolet Motor Division

Campbell-Ewald

GM Service & Parts Operations

Campbell-Ewald; chemistri

GMAC

Campbell-Ewald

Hummer

Modernista!

OnStar Corp.

Campbell-Ewald

Pontiac-GMC Division

chemistri; Lowe Worldwide

Saab Cars USA

Lowe Worldwide

Saturn Corp.

Goodby, Silverstein & Partners

2. Procter & Gamble Co.

Clairol, Cover Girl, Downy, Febreze, Hydrience, Joy, Natural Instincts, Nice 'n Easy, Pantene, Pringles, Sure, Torengos, Ultress, Zest

Grey Worldwide

Aussie, Daily Defense, Dawn, Herbal

Essences, Infusium 23, Renewal 5X, Swiffer

Kaplan Thaler Group

Always, Max Factor, Noxzema, Pert Plus, Secret, Tampax, Vidal Sassoon

Leo Burnett Worldwide

Bounty, Charmin, DayQuil, Metamucil, NyQuil, Pepto-Bismol, Prilosec, Puffs, ThermaCare, Vicks

Publicis Worldwide

Cascade, Crest, Dreft, Eukanuba, Fixodent, Folgers, Head & Shoulders, Iams, Luvs, Millstone, Olay, Old Spice, Pampers, Pur, Safeguard, Scent Expression, Scope, Sunny Delight, Tide

Saatchi & Saatchi

3. Time Warner

America Online

BBDO Worldwide; Martin Agency

Home Box Office

BBDO Worldwide

Time Inc.

Fallon Worldwide; Mullen; Deutsch

Time4 Media

In-house

Time Warner Cable

Ogilvy & Mather

Turner Broadcasting System

Assigned on a project basis

Warner Bros. Entertainment

In-house

4. Pfizer

PFIZER CONSUMER HEALTHCARE

Lubriderm, Nicotrol, Prograine, Rogaine

Atmosphere BBDO

Actifed, Anusol, Benadryl, Ben-Gay, Benylin, Cortisone, Desitin, Dramamine, Efferdent, e.p.t., Kaopectate, Listerine, Listerine Pocket Paks, Ludens, Neosporin, PediaCare, Roloids, Sinutab, Sudafed, Tucks, Unisom, Visine, Zantac

JWT

PFIZER PHARMACEUTICALS GROUP

Relpax

Arnold Worldwide

Zyrtec

Berlin Cameron/Red Cell

Diflucan

Cline Davis & Mann

Bextra, Dostinex, Dynastat, Genotropin, Inspra, Pregabalin,

Somavert

Euro RSCG Life LM&P

Celebrex, Zoloff

Kaplan Thaler Group

Bextra, Viagra

McCann Erickson Worldwide

Lipitor

Merkley & Partners

Detrol

Saatchi & Saatchi Healthcare

Eisai

TBWA Health

5. DaimlerChrysler

Chrysler Division

BBDO Detroit

Dodge Division

BBDO Detroit

Jeep Division

BBDO Detroit

Mercedes-Benz USA

Merkley & Partners

COLOR KEY FOR AGENCY
HOLDING COMPANIES

Omnicom Group

Interpublic Group of Cos.

WPP Group

Publicis Group

Havas

Not all brands and divisions are listed. To purchase more information on advertisers and their agencies, see Ad Age's Leading National Advertisers pdf at AdAge.com QwikFIND aap76g or [CLICK HERE](#)

TOP 25 U.S. ADVERTISERS

From 100 Leading National Advertisers (AA, June 28, 2004). Table ranks marketers by their 2003 U.S. spending, the sum of measured media from TNS Media Intelligence and unmeasured estimates by Ad Age that include promotion and direct marketing, etc. Dollars are in billions. The next edition of this Special Report will be published June 27, 2005.

RANK	MARKETER	U.S. AD SPENDING	% CHANGE
1	General Motors Corp.	\$3.43	-1.4
2	Procter & Gamble Co.	3.32	24.3
3	Time Warner	3.10	6.0
4	Pfizer	2.84	10.6
5	DaimlerChrysler	2.32	14.1
6	Ford Motor Co.	2.23	-0.8
7	Walt Disney Co.	2.13	18.1
8	Johnson & Johnson	2.00	10.9
9	Sony Corp.	1.81	12.0
10	Toyota Motor Corp.	1.68	8.4
11	Verizon Communications	1.67	9.6
12	Sears, Roebuck & Co.	1.63	-1.7
13	General Electric Co.	1.58	25.4
14	GlaxoSmithKline	1.55	0.0
15	SBC Communications	1.51	38.4
16	McDonald's Corp.	1.37	2.4
17	Unilever	1.33	-18.8
18	Altria Group	1.31	8.7
19	Nissan Motor Co.	1.30	34.6
20	Merck & Co.	1.26	9.1
21	Viacom	1.25	-0.9
22	L'Oreal	1.24	10.9
23	PepsiCo	1.21	8.8
24	Home Depot	1.15	29.9
25	Microsoft Corp.	1.15	26.2

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76z or [CLICK HERE](#)

TOP 25 U.S. MEGABRANDS

From Megabrands (AA, July 19, 2004). Basic data from TNS Media Intelligence. Measured media totals are AA estimates in millions for calendar 2003. *Includes AT&T Wireless (now part of Cingular) and AT&T Corp. (which SBC Communications intends to purchase). **SBC owns 60% and BellSouth Corp. 40%. The next edition of this Special Report will be published July 18, 2005.

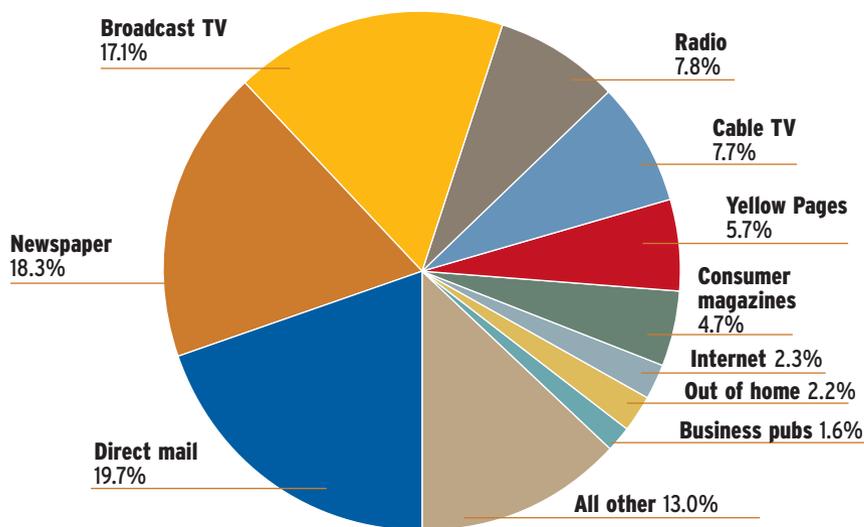
RANK	MEGABRAND	U.S. AD SPENDING	% CHANGE
1	Verizon telecommunications	\$1,177.5	11.1
2	AT&T telecommunications*	1,035.9	-3.4
3	Ford vehicles	853.1	-3.2
4	Sprint telecommunications	805.4	23.9
5	Nissan vehicles	776.1	38.5
6	Toyota vehicles	757.4	7.5
7	Chevrolet vehicles	687.0	-19.4
8	Cingular wireless phone service**	645.0	24.3
9	Sears department stores	627.3	-0.6
10	McDonald's restaurants	619.4	2.3
11	Dodge vehicles	584.9	17.3
12	Home Depot building supply stores	539.4	31.3
13	Chrysler vehicles	509.5	16.5
14	Honda vehicles	486.6	-8.2
15	Wal-Mart discount stores	467.7	11.2
16	Dell computers	466.9	10.6
17	Microsoft software	458.2	59.0
18	Target discount stores	442.7	20.1
19	IBM computers & services	423.1	6.5
20	Hewlett-Packard computers	409.3	38.0
21	J.C. Penney Co. department stores	402.3	5.2
22	General Motors corporate	378.6	50.5
23	American Express financial services	368.7	29.7
24	Volkswagen vehicles	367.2	-0.7
25	T-Mobile wireless phone service	364.5	1.9

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap81z or [CLICK HERE](#)

U.S. AD SPENDING TOTALS BY MEDIA

From Robert J. Coen's Universal McCann U.S. Volume Report as reported in 100 Leading National Advertisers (AA, June, 28, 2004). This table shows advertising totals by media. Ad spending figures are for calendar 2003 in billions and include all commissions as well as art, mechanical and production expenses. *Includes network, spot, syndicated and Spanish-language TV.

RANK	MEDIUM	U.S. AD SPENDING	% CHANGE
1	Direct mail	\$48.37	5.0
2	Newspaper	44.84	1.8
3	Broadcast TV*	41.93	-0.3
4	Radio	19.10	1.2
5	Cable TV	18.81	15.4
6	Yellow Pages	13.90	0.9
7	Consumer magazine	11.44	4.0
8	Internet	5.65	15.7
9	Out of home	5.44	5.2
10	Business publications	4.00	0.7
11	All other	31.99	4.1
12	Total	245.48	3.6



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TOP U.S. ADVERTISERS BY MEDIA

From 100 Leading National Advertisers (AA, June 28, 2004). Table ranks advertisers by measured media in the U.S. Ad spending figures are for calendar 2003 from Ad Age and TNS Media Intelligence. Dollars are in millions. Rankings continue on Pages 16 and 17.

RANK	MARKETER	AD SPENDING IN MEDIUM	% CHANGE
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NEWSPAPER

1	Verizon Communications	\$513.7	36.3
2	AT&T Wireless	510.4	21.7
3	Federated Department Stores	493.7	-5.3
4	Sprint Corp.	477.0	75.6
5	SBC Communications	441.7	42.5

CONSUMER MAGAZINE

1	Procter & Gamble Co.	\$582.3	16.7
2	General Motors Corp.	453.8	15.0
3	Altria Group	367.9	-4.1
4	Johnson & Johnson	306.9	19.3
5	DaimlerChrysler	299.0	11.4

SUNDAY MAGAZINE

1	Dell	\$76.8	7.5
2	National Consumer Marketing	62.0	-53.5
3	Bradford Exchange	54.1	0.1
4	Bose Corp.	53.7	13.2
5	Sears, Roebuck & Co.	45.3	43.3

OUTDOOR

1	Anheuser-Busch Cos.	\$57.0	15.7
2	McDonald's Corp.	41.6	27.0
3	Time Warner	37.0	15.9
4	General Motors Corp.	32.3	11.6
5	Nissan Motor Co.	32.2	150.5

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76v or [CLICK HERE](#)

TOP U.S. ADVERTISERS BY MEDIA

From 100 Leading National Advertisers (AA, June 28, 2004). Tables rank advertisers by U.S. measured media. Ad spending, for calendar 2003, is from Ad Age and TNS Media Intelligence. Dollars are in millions. Media spending by top marketers is detailed in the 100 Leading National

RANK	MARKETER	EXPENDITURE IN MEDIUM	% CHANGE
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NETWORK TV

1	Procter & Gamble Co.	\$833.6	15.2
2	General Motors Corp.	641.4	-11.8
3	Johnson & Johnson	527.5	3.7
4	Ford Motor Co.	449.6	2.7
5	Pfizer	442.4	3.1

CABLE TV

1	Procter & Gamble Co.	\$514.6	33.2
2	General Motors Corp.	311.3	4.9
3	Time Warner	250.1	5.5
4	Altria Group	187.4	16.5
5	Walt Disney Co.	168.3	29.5

SPOT TV

1	DaimlerChrysler	\$596.0	1.1
2	General Motors Corp.	393.0	-26.1
3	Honda Motor Co.	330.9	8.2
4	Nissan Motor Co.	320.1	33.3
5	Ford Motor Co.	277.8	-19.4

SPANISH-LANGUAGE NETWORK TV

1	Lexicon Marketing Group	\$216.2	NA
2	Procter & Gamble Co.	145.8	24.2
3	Sears, Roebuck & Co.	120.5	23.1
4	PepsiCo	76.3	37.7
5	General Motors Corp.	59.0	23.1

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Advertisers Profile Edition, which can be purchased at QwikFIND **aap76g**. The supplement also includes listings of top brands and key marketing personnel for each top 100 company. *Internet figures are Ad Age estimates based on TNS data.

RANK	MARKETER	EXPENDITURE IN MEDIUM	% CHANGE
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SYNDICATED TV

1	Procter & Gamble Co.	\$329.2	51.1
2	Johnson & Johnson	101.5	52.4
3	GlaxoSmithKline	93.7	-6.1
4	Pfizer	84.9	2.5
5	Mars Inc.	74.5	40.0

NETWORK RADIO

1	General Motors Corp.	\$36.1	123.1
2	AutoZone	34.6	0.1
3	RadioShack Corp.	30.8	64.7
4	Pfizer	26.4	34.7
5	Procter & Gamble Co.	25.5	3.0

NATIONAL SPOT RADIO

1	SBC Communications	\$144.2	32.7
2	Home Depot	102.5	63.2
3	Verizon Communications	79.2	11.2
4	Time Warner	73.4	45.9
5	News Corp.	67.9	38.9

INTERNET*

1	Time Warner	\$120.2	-31.4
2	InterActiveCorp	77.2	50.2
3	Dell	48.9	74.1
4	General Motors Corp.	48.0	17.9
5	Toyota Motor Corp.	47.9	109.8

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76v or [CLICK HERE](#)

TOP 25 GLOBAL MARKETERS

From Global Marketing (AA, Nov. 8, 2004). Essential data from Nielsen Media Research, TNS Media Intelligence, Ibope and others. Figures are Ad Age estimates in millions of U.S. dollars and include measured media only. The next edition of the Global Marketing special report will be published on Nov. 14, 2005.

RANK	GLOBAL MARKETER	2003 AD SPENDING	% CHANGE
1	Procter & Gamble Co.	\$5,762	29.0
2	Unilever	3,540	13.3
3	General Motors Corp.	3,412	4.1
4	Toyota Motor Corp.	2,669	9.2
5	Ford Motor Co.	2,537	3.9
6	Time Warner	2,378	9.9
7	DaimlerChrysler	2,230	15.7
8	L'Oreal	2,180	37.3
9	Nestle	1,737	19.5
10	Sony Corp.	1,684	17.7
11	Walt Disney Co.	1,680	22.4
12	Nissan Motor Co.	1,674	27.7
13	Johnson & Johnson	1,665	14.1
14	Honda Motor Co.	1,542	6.9
15	Altria Group	1,514	9.2
16	Volkswagen	1,435	13.1
17	PepsiCo	1,255	9.5
18	Pfizer	1,229	9.0
19	McDonald's Corp.	1,213	3.3
20	Coca-Cola Co.	1,195	0.8
21	GlaxoSmithKline	1,176	5.2
22	General Electric Co.	1,107	0.0
23	Reckitt Benckiser	1,097	36.7
24	Danone Group	1,018	47.8
25	News Corp.	1,005	9.8

TOP ADVERTISERS IN TOP 10 COUNTRIES, EXCLUDING THE U.S.

From Global Marketing (AA, Nov. 8, 2004). Estimated totals, in millions, are by country from ZenithOptimedia's "Advertising Expenditure Forecasts," December 2004 and 2003 editions. Data by advertiser from Nielsen Media Research, TNS Media Intelligence, Ibope, Nikkei Advertising Research Institute, Carat, Pan Arab Research Center and others. Advertiser figures are Ad Age estimates in millions of U.S. dollars and include measured media only.

Figures are converted to U.S. dollars using average annual exchange rates on an historical basis. By comparison, the U.S. ranking (Page 12) is led by General Motors Corp. at \$3.43 billion in measured spending out of a national total of \$128.36 billion, according to TNS. The next edition of this Global Marketing feature will be published Nov. 14, 2005.

RANK	COUNTRY/LEAD MARKETER	2003 AD SPENDING	% CHANGE
1	Japan	\$36,222	8.1
	Toyota Motor Corp.	\$944	-3.8
2	Germany	18,036	6.3
	Procter & Gamble Co.	312	23.8
3	United Kingdom	17,043	11.8
	Unilever	370	30.8
4	France	10,789	19.5
	Danone Group	523	81.4
5	Italy	8,831	24.6
	Fiat	100	12.1
6	China	7,658	20.8
	Procter & Gamble Co.	611	NA
7	South Korea	6,785	12.8
	Samsung Group	167	13.3
8	Spain	6,278	23.5
	Telefonica	146	50
9	Canada	6,101	16.9
	General Motors Corp.	271	12.3
10	Australia	5,433	32.6
	Coles Myer	180	55.3

TOP 10 AUTOMOTIVE NAMEPLATES

From 100 Leading National Advertisers (AA, June 28, 2004). Ad spending in 2003 in millions from TNS Media Intelligence. Share, from Automotive News, a sibling publication of Advertising Age., based on 16.7 million units sold in the U.S. in 2003.

RANK	NAMEPLATE	U.S. MARKET SHARE	AD SPENDING
1	Ford Division	17.3%	\$757.0
2	Chevrolet	15.8	630.1
3	Toyota Division	9.6	651.9
4	Dodge	7.3	544.9
5	Honda Division	7.1	423.4
6	Nissan Division	4.1	758.0
7	GMC	3.4	176.0
8	Pontiac	2.9	164.0
9	Chrysler Division	2.8	472.3
10	Jeep	2.6	309.5

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76u or [CLICK HERE](#)

TOP 10 BEER BRANDS

From 100 Leading National Advertisers (AA, June 28, 2004). Ad spending is in millions from TNS Media Intelligence for calendar 2003. Beer market share from Beer Marketer's Insights and based on 208.2 million barrels of beer in 2003.

RANK	BRAND	U.S. MARKET SHARE	AD SPENDING
1	Bud Light	18.3%	\$130.4
2	Budweiser	14.9	121.0
3	Coors Light	8.0	126.7
4	Miller Lite	7.6	122.6
5	Natural Light	4.0	0.2
6	Busch	3.4	10.9
7	Corona Extra	3.4	33.1
8	Busch Light	2.8	2.6
9	Miller High Life	2.6	21.5
10	Miller Genuine Draft	2.2	42.6

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76q or [CLICK HERE](#)

TOP 10 LIMITED SERVICE RESTAURANTS

From 100 Leading National Advertisers (AA, June 28, 2004). Ad spending in 2003 in millions from TNS Media Intelligence. Share from Technomic's top 200 chains (57% of \$288.4 billion U.S. restaurant sales).

RANK	CHAIN	U.S. MARKET SHARE	AD SPENDING
1	McDonald's Corp.	19.5%	\$551.5
2	Burger King	7.0	272.1
3	Wendy's	6.5	297.5
4	Subway	5.0	249.5
5	Taco Bell	4.7	201.0
6	Pizza Hut	4.4	171.4
7	KFC	4.4	222.7
8	Starbucks	3.3	19.0
9	Domino's Pizza	2.7	114.6
10	Dunkin' Donuts	2.7	50.3

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76p or [CLICK HERE](#)

TOP 10 CASUAL DINING RESTAURANTS

From 100 Leading National Advertisers (AA, June 28, 2004). Ad spending in 2003 in millions from TNS Media Intelligence. Share from Technomic's top 200 chains (57% of \$288.4 billion U.S. restaurant sales).

RANK	CHAIN	U.S. MARKET SHARE	AD SPENDING
1	Applebee's	9.8%	\$106.1
2	Outback Steakhouse	6.9	56.3
3	Chili's Grill & Bar	6.7	94.8
4	Red Lobster	6.6	91.5
5	Olive Garden	5.6	86.3
6	T.G.I. Friday's	4.9	63.0
7	Ruby Tuesday	3.7	2.5
8	Cheesecake Factory	2.0	1.1
9	Romano's Macaroni Grill	1.8	17.2
10	Bennigan's	1.6	1.2

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76p or [CLICK HERE](#)

TOP 10 MEN'S DEODORANTS & LOTIONS

From 100 Leading National Advertisers (AA, June 28, 2004). 2003 ad spending in millions from TNS Media Intelligence. Chart merges deodorants, shaving lotions/colognes/talc, body washes and sprays and skincare creams to form a total market of \$1.26 billion in sales. Share data from IRI.

RANK	BRAND	U.S. MARKET SHARE	AD SPENDING
1	Old Spice	13.3%	\$40.3
2	Mennen	8.0	3.4
3	Right Guard	7.6	22.5
4	Degree	5.6	19.9
5	Axe	4.1	26.4
6	Gillette Series	3.5	1.8
7	Ban	2.9	12.9
8	Arrid Extra Dry	2.5	10.9
9	Arm & Hammer Ultramax	2.3	5.6
10	Mitchum	1.9	0.0

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76s or [CLICK HERE](#)

TOP 10 AIR & RUG FRESHENERS

From 100 Leading National Advertisers (AA, June 28, 2004). Ad spending is in millions from TNS for calendar 2003. Combines \$954.5 million market for in-home deodorizers, air fresheners/purification products, rug cleaners and scented household products like candles. Share from IRI.

RANK	BRAND	U.S. MARKET SHARE	AD SPENDING
1	Glade	25.3%	\$58.2
2	Air Wick/Wizard	13.9	30.1
3	Febreze	8.9	41.4
4	Renuzit	7.7	0.0
5	Rug Doctor	6.5	0.0
6	Resolve	5.5	9.0
7	Oust	3.8	32.6
8	Woolite	3.5	6.3
9	Private label	2.3	0.0
10	Lysol NeutraAir	2.0	15.6

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76r or [CLICK HERE](#)

TOP 10 FLAT PANEL TV MARKETERS

From 100 Leading National Advertisers (AA, June 28, 2004). Shares from NPD Group are for plasma and LCD flat-panel TVs by dollar volume for 52 weeks ending in March 2004. Ad spending, in millions, from TNS Media Intelligence, is for calendar 2003.

RANK	BRAND	U.S. MARKET SHARE	AD SPENDING
1	Sony	23.8%	\$10.5
2	Sharp	16.5	20.2
3	Panasonic	11.5	11.1
4	Pioneer	9.9	4.1
5	Samsung	9.0	14.6
6	Philips	5.2	13.6
7	Hitachi	4.0	2.4
8	Zenith	3.7	5.4
9	Toshiba	2.8	2.1
10	Fujitsu	1.9	0.2

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76t or [CLICK HERE](#)

TOP 10 RETAILERS

From 100 Leading National Advertisers (AA, June 28, 2004). Retailers are ranked by ad spending in millions from TNS Media Intelligence for calendar 2003. Sales are in billions for 2003 from public documents.

RANK	RETAILER	AD SPENDING	SALES
1	Sears, Roebuck & Co.	\$634.7	\$41.12
2	Federated Department Stores	604.8	15.26
3	Target Corp.	573.7	48.16
4	May Department Stores	543.4	13.34
5	Home Depot	522.7	64.82
6	J.C. Penney Co.	436.4	17.79
7	Wal-Mart Stores	428.6	256.33
8	Gap	356.0	15.85
9	Best Buy Co.	302.1	24.55
10	Lowe's Cos.	299.2	30.84

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap76m or [CLICK HERE](#)

IAG'S TOP SPOTS OF 2004

The Ad Age/IAG 2004 Recall Report focuses exclusively on television ads breaking Jan 1 - Dec 31, 2004 and ranks the spots based upon viewers' ability to recall the new ads and their associated brands/products. The Recall Ranking is derived from an ad's individual Recall Score and Recall Index. The Recall Score is the percentage of TV viewers who can recall within 24 hours the brand of the ad they were exposed to during the normal course of viewing TV.

These scores are then indexed against the mean score for all new ads during the time period (Recall Index). 100 equals average. The Overall ad performance ranking also includes an additional measure of Likability, which is derived from an ad's Likability Score and Likability Index. The Likability Score is the percentage of viewers who claim to like an ad "a lot" (among those who can recall the ad and its associated brand). These scores are then indexed against the mean score for all new ads during the time period (Likability Index). 100 equals average.

For same-length spots with minor variations, all versions are aggregated to yield one combined score. All ads under consideration must meet a minimum survey sample size of 200. The Overall Top 10 Recall ranking is based on over 7.9 million surveys of TV viewers conducted between Jan 2, 2004 and Jan 1, 2005. Total sample size varies across individual product category rankings.

MOST RECALLED ADS OF 2004

RANK	BRAND	AD DESCRIPTION	INDEX
1	Windex	30% better—birds sit on weather vane, other birds fly into window, injured birds in casts	240
2	Pizza Hut	4 for All Pizza—Muppets argue over what toppings they want on pizza (:15)	237
3	DirecTV	Fan Letter—Robert Duvall dramatically reads fan letter by Jason Steeg	237
4	Breathe Right	Nasal Spray & Strips—couple makes fun of each other's snoring	235
5	Pizza Hut	4 for All Pizza—Muppets argue over what toppings they want on pizza (:30)	232
6	M&M's	Wizard of Oz spoof, M&M's & Dorothy help the M&M's find their colors	232
7	Capital One	No Hassle Rewards—David Spade says "no" to man on phone	232
8	Capital One	PrimeLock—Huns charge through mall toward woman paying for gifts with credit card	230
9	Oreo	Boy dunks & eats Oreos with grandfather; milk's favorite cookie	229
10	AFLAC	Woman sees private investigator, duck out in rain, black-and-white film noir spoof	227

MOST RECALLED:



MOST LIKED:



MOST LIKED ADS OF 2004

RANK	BRAND	AD DESCRIPTION	INDEX
1	Ford	Kyle returns home from war, family greets him at airport*	243
2	THQ	WWE Smackdown vs. Raw—Torrie Wilson & Stacy Keibler fight; scenes of game	220
3	Chevrolet	SSR—kids with soap in their mouths, boy cusses when he sees convertible	217
4	Bud Light	Couple in horse-drawn sled, woman holds candle and is flamed when horse passes gas	212
5	Lay's	Elderly couple fights over bag of chips, woman has his dentures	211
6	Budweiser	Football coach yells at ref, same ref gets yelled at by wife at home	197
7	Budweiser	Donkey dreams of becoming a Clydesdale	196
8	Pepsi	Bear tears apart cabin, then dresses up like human to buy soda	190
9	Nissan	Maxima—woman wearing coat touches car in snowy winter weather	189
10	Chrysler	300—woman jogging on street imagines herself in car as it passes; has bold style	188

*Spot aired following NBC's 11/21 "American Dreams" (4:50)

MEDIA

Top U.S. media company

TIME WARNER GAINS \$29.25 BILLION FROM MEDIA

Top cable TV network in ad revenue

ESPN BAGS \$1.16 BILLION

Top magazine by gross revenue from advertising, circulation

"PEOPLE" COUNTS \$1.24 BILLION

Top newspaper by circulation

"USA TODAY" NABS AVERAGE DAILY CIRCULATION
OF 2.22 MILLION

Most expensive weekly TV show in prime time

"AMERICAN IDOL" PULLS \$658,333 PER :30

Content, sources for media rankings

IN THIS SECTION, IT IS ALL ABOUT MEDIA, broadly defined as media distribution businesses supported by advertising.

Properties of the nation's 12 largest media monoliths, from Time Warner to EchoStar Communications Group, are shown on Pages 28-29. The companies were ranked in Ad Age's 100 Leading Media Companies report (AA, Aug. 23, 2004).

That ranking was based on the flow of net revenue from each company's U.S. media properties, which may or may not equate to a company's total corporate revenue. Revenue streams from book publishing, book and record clubs, movie and TV production, media-buying services, electronic retailing, paper mills, wireless services, and trade show divisions are excluded from media totals.

In preparing this annual list, Ad Age draws on public documents in general, BIA Financial Network specifically for radio and TV and Kagan World Media for cable networks. Other informed sources also were used.

Gross revenue from advertising and circulation is the metric used to rank 300 magazines in the Ad Age Magazine 300 report (AA, Sept. 20, 2004). The top 10 are presented on Page 37. Other rankings—magazines and newspapers by circulation and gross ad revenue, web sites by ad revenue, TV networks and Spanish-language TV by their ad take—are from leading industry monitoring services such as Publishers Information Bureau, TNS Media Intelligence and Audit Bureau of Circulations.

What do women see in our comedies?
Mostly...themselves.



SABRINA, THE TEENAGE WITCH

MAJOR DIVISIONS, PROPERTIES OF THE NATION'S LEADING MEDIA COMPANIES

PRIMARY PROPERTIES COLOR CODED BY MEDIA TYPE

1. Time Warner

America Online

Home Box Office Services

HBO, Cinemax

Time Inc.

People, Sports Illustrated, Time, InStyle

Southern Progress Corp.

Southern Living, Cooking Light, Sunset

Time4 Media

Golf Magazine, Field & Stream

Time Warner Cable

Time Warner Cable, Road Runner

Turner Broadcasting System

TNT, CNN, CNN.com, TBS

Warner Bros. Entertainment

WB Television Network

2. Comcast Corp.

Comcast Cable Communications

Cable Networks

Golf Channel, Outdoor Life, G4techTV

E! Networks

E! Entertainment Television, Style

3. Viacom

BET Holdings

BET, BET on Jazz

CBS TV Network

WCBS-TV (New York)

Infinity Broadcasting Corp.

WINS AM (New York)

MTV Networks

Nickelodeon, MTV, Comedy Central, SpikeTV

Showtime Networks

Showtime, Movie Channel, Flix

UPN

KTXA-TV (Dallas-Fort Worth)

Viacom Outdoor

4. Walt Disney Co.

ABC Inc.

A&E Television Networks

A&E, History Channel

ABC TV Network

WABC-TV (New York)

ABC Radio Networks

WPLJ FM (New York)

Disney ABC Cable Networks

Disney Channel, ABC Family

ESPN Inc.

ESPN, ESPN2, ESPN.com

Lifetime Entertainment Services

Lifetime Channel

Buena Vista Magazines

ESPN Magazine, FamilyFun, Discover

Us Weekly (Wenner Media owns 50%)

5. NBC Universal General Electric Co.

NBC Television Network

WNBC-TV (New York)

NBC Universal Cable

USA Network, CNBC, Sci Fi, Bravo

MSNBC

MSNBC, MSNBC.com

Paxson Communications Corp.

WPXN-TV (New York)

Telemundo Communications Group

KVEA-TV (Los Angeles)

6. Cox Enterprises

Cox Communications

Cox Cable, Cox High Speed Internet

Cox Newspapers

Atlanta Journal-Constitution

Cox Radio

WSB AM (Atlanta)

Cox Television

KTVU-TV (San Francisco)

7. DirecTV Group News Corp. 34%

DirecTV

8. News Corp.

Fox Entertainment Group

Fox Broadcasting Co.

KTTV-TV (Los Angeles)

Fox Cable Networks Group

Fox Sports Networks, FX, Fox News

Gemstar-TV Guide International

TV Guide, TV Guide Channel

New York Post

News America Marketing

Weekly Standard

9. Gannett Co.

USA Today, USA Weekend, Arizona Republic

Gannett Broadcasting

KUSA-TV (Denver)

10. Clear Channel Communications

Clear Channel Radio

WLTW-FM (New York)

Clear Channel Television

WKRC-TV (Cincinnati)

Clear Channel Outdoor

11. Advance Publications

Advance Newspapers

The Star-Ledger (Newark)

Bright House Networks

Conde Nast Publications

Vogue, Vanity Fair, Glamour, New Yorker

Fairchild Publications

Bride's, W, Modern Bride, Jane, Details

Golf Digest Cos.

Golf Digest, Golf World, Golf for Women

Parade Publications

Parade

12. EchoStar Communications Group

DISH Network

MEDIA PROPERTY COLOR CODES

Division, Magazine, Newspaper, TV, Cable/Satellite, Internet, Radio

The Top 12 are based on media revenue in 2003. Not all properties owned by the companies are shown. Properties shown may be partly owned. A pullout poster illustrating ownership of properties of 15 top U.S. media companies appeared in the

100 Leading Media Companies Special Report (AA, Aug. 23, 2004) and can also be downloaded from AdAge.com QwikFIND aap90n. The family tree diagram includes revenue, circulation and some subscriber data.

AD AGE'S FALL 2004 PRIME TIME PRICING SURVEY

From an annual feature (AA, Sept. 27, 2004), average costs for a 30-second spot are compiled from estimates of advertising agencies and media-buying companies. 1) Later fall shows: King of the Hill, Malcolm, Partner, Swan, Billionaire, House, Bernie Mac, O.C., Champ. 2) January shows: Sketch, King of the Hill, Malcolm, American Dad, ABC Monday Night Movie, Grey's, Athens, "24", American Idol, Related, Bernie Mac, Inside, Jonny Zero. 3) Mid-season shows: Alias, Blind Justice

MONDAY

8 p.m.		9 p.m.		10 p.m.
The Benefactor / Movie of Week² \$79,752/NA		Monday Night Football/Movie² \$307,019/NA		MNF/Grey's Anatomy² \$323,000/NA
Still Standing \$152,801	Listen Up \$163,733	Raymond \$315,850	Two & Half Men \$249,017	CSI: Miami \$256,760
Fear Factor \$138,972		Las Vegas \$182,861		LAX \$139,967
North Shore / Athens² \$109,226/NA		The Swan¹ / "24"² \$118,200/NA		No Fox programming
One on One \$45,582	Half and Half \$51,027	Girlfriends \$62,500	Second Time \$48,592	No UPN programming
7th Heaven \$107,956		Everwood \$76,263		No WB programming

TUESDAY

8 p.m.		9 p.m.		10 p.m.
My Wife & Kids \$167,956	George Lopez NA	According to Jim \$204,212	Rodney \$108,260	NYPD Blue/Blind Justice³ \$132,144/NA
NCIS \$97,577		Clubhouse \$102,053		Judging Amy \$99,184
Last Comic /Avg. Joe/Contender \$137,050/\$117,500/\$330,000		Father of Pride \$156,500	Scrubs \$216,600	Law & Order: SVU \$181,494
Billionaire/American Idol² \$217,713/\$620,000		House¹ \$192,561		No Fox programming
All of Us \$48,080	Eve \$44,719	Veronica Mars \$23,556		No UPN programming
Gilmore Girls \$76,334		One Tree Hill \$102,820		No WB programming

WEDNESDAY

8 p.m.		9 p.m.		10 p.m.
Lost \$133,514		Bachelor/Bachelorette \$205,522		Wife Swap \$129,969
60 Minutes \$66,295		King of Queens \$143,302	Center Universe \$94,613	CSI: New York \$161,548
Hawaii \$132,346		The West Wing / Revelations \$213,538/\$221,100		Law & Order \$227,500
That '70s Show \$202,307	Quints/Related² \$177,825/\$280,000	Mac¹ / Idol² \$158,000/\$658,333	Method/Mac² \$149,295/\$313,000	No Fox programming
America's Top Model \$92,045		Kevin Hill \$39,369		No UPN programming
Smallville \$111,700		Blue Collar TV \$73,200	Green Screen \$42,000	No WB programming

SUNDAY

7 p.m. (ET)		8 p.m.	9 p.m.		10 p.m.
America's Funniest Home Videos \$81,136		Extreme Makeover: Home Ed. \$186,658	Desperate Housewives/Alias³ \$156,542/NA		The Practice: Fleet Street \$160,000
60 Minutes \$90,453		Cold Case \$153,305	CBS Sunday Movie \$148,761		
Dateline \$62,184		American Dreams \$94,040		Law & Order: Criminal Intent \$194,931	Crossing Jordan \$164,918
King¹ \$95,750	Malcolm¹ \$281,800	The Simpsons \$336,935	Arrested¹ \$211,133	Partner¹ \$177,580	No Fox programming
Steve Harvey's Big Time \$39,970		Charmed \$77,802		Jack & Bobby \$82,415	No WB programming

THURSDAY

8 p.m.		9 p.m.		10 p.m.
Extreme Makeover \$74,859		Life As We Know It \$49,322		Prime Time Live \$89,108
Survivor: Vanuatu \$412,833		CSI: Crime Scene Investigation \$374,231		Without a Trace \$211,002
Joey \$392,500	Will & Grace \$359,546	The Apprentice \$409,877		ER \$479,250
The O.C.¹ \$164,990		Tru Calling \$129,208		No Fox programming
WWE Smackdown! \$30,500				No UPN programming
The Mountain \$77,182		Studio 7 \$39,907		No WB programming

FRIDAY

8 p.m.		9 p.m.		10 p.m.	
8 Rules \$106,813	Savages \$102,187	Hope & Faith \$140,037	Less Than Perf. \$117,700	20/20 \$100,680	
Joan of Arcadia \$95,325		JAG \$70,148		Dr. Vegas \$76,763	
Dateline \$72,479		Third Watch \$90,858		Medical Investigation \$123,994	
Specials /The Insider NA/\$63,100		Next Great Champ/Jonny Zero² \$85,000/\$75,500		No Fox programming	
America's Top Model (RPT) \$88,660		Enterprise \$31,180		No UPN programming	
What I Like \$49,661	Commando Nanny \$38,838	Reba \$59,705	Grounded \$60,772	No WB programming	

SATURDAY

8 p.m.		9 p.m.		10 p.m.
Wonderful World of Disney \$69,610				
The Amazing Race \$91,139		Crime Time Saturday \$73,140		48 Hours Mysteries \$46,489
The Apprentice (RPT) \$63,500		NBC Saturday Night Movie \$67,377		
Cops \$79,400	Cops \$73,900	America's Most Wanted \$71,500		No Fox programming

TOP 25 U.S. MEDIA COMPANIES

From 100 Leading Media Cos. (AA, Aug. 23, 2004). *Estimated 2003 media revenue in millions of dollars is U.S.-only and solely from media distribution businesses supported by advertising. Many of these media companies have non-media units. Sources: BIA Financial Network, Kagan World Media, TNS Media Intelligence, Audit Bureau of Circulations. Next edition will be published Aug. 22, 2005.

RANK	MEDIA COMPANY	NET MEDIA REVENUE*	% CHANGE
1	Time Warner	\$29,247	3.7
2	Comcast Corp.	17,492	9.3
3	Viacom	17,252	8.2
4	Walt Disney Co.	11,239	12.5
5	NBC Universal (General Electric Co.)	8,177	-1.8
6	Cox Enterprises	8,108	10.3
7	DirecTV Group	7,696	19.4
8	News Corp.	7,532	9.4
9	Gannett Co.	6,330	4.2
10	Clear Channel Communications	6,138	4.9
11	Advance Publications	5,909	9.2
12	EchoStar Communications Corp.	5,410	22.1
13	Tribune Co.	5,398	3.8
14	Charter Communications	4,819	5.5
15	Hearst Corp.	4,045	8.4
16	Cablevision Systems Corp.	3,694	12.2
17	Adelphia Communications Corp.	3,584	4.6
18	The New York Times Co.	3,227	4.8
19	Knight Ridder	2,848	0.4
20	Bloomberg	2,380	6.3
21	The Washington Post Co.	2,001	1.9
22	Dow Jones & Co.	1,549	-0.7
23	E.W. Scripps Co.	1,531	9.2
24	Belo	1,436	0.6
25	Univision Communications	1,392	7.7

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap90x or [CLICK HERE](#)

TOP MEDIA COMPANIES BY SECTOR

From 100 Leading Media Cos. (AA, Aug. 23, 2004). Estimated 2003 media revenue in millions of dollars is U.S.-only and from media distribution businesses supported by advertising. Sources include BIA Financial Network, Kagan World Media, TNS Media Intelligence, Audit Bureau of Circulations. Companies by sector continue on Pages 34-36.

TOP 10 NEWSPAPER COMPANIES

RANK	MEDIA COMPANY	NET NEWSPAPER REVENUE	% CHANGE
1	Gannett Co.	\$5,610	5.8
2	Tribune Co.	4,017	2.4
3	The New York Times Co.	3,008	5.0
4	Knight Ridder	2,768	-0.4
5	Advance Publications	2,128	5.6
6	Hearst Corp.	1,458	10.5
7	Cox Enterprises	1,400	3.7
8	Dow Jones & Co.	1,227	-1.9
9	McClatchy Co.	1,098	2.8
10	The Washington Post Co.	873	3.7

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap90z or [CLICK HERE](#)

TOP 10 MAGAZINE COMPANIES

RANK	MEDIA COMPANY	NET MAGAZINE REVENUE	% CHANGE
1	Time Warner	\$4,514	2.1
2	Advance Publications	2,197	13.3
3	Hearst Corp.	1,900	12.4
4	Primedia	1,079	-3.4
5	Reader's Digest Association	835	-2.3
6	Meredith Corp.	808	15.0
7	Gruner & Jahr USA (Bertelsmann)	788	-5.0
8	International Data Group	760	-5.1
9	McGraw-Hill Cos.	668	-4.4
10	Reed Elsevier	601	-7.3

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap91a or [CLICK HERE](#)

TOP MEDIA COMPANIES BY SECTOR

From 100 Leading Media Cos. (AA, Aug. 23, 2004). Calendar 2003 media revenue are U.S.-only media distribution businesses supported by advertising. Figures are estimates in millions of dollars. Primary sources include BIA Financial Network, Kagan World Media, TNS Media Intelligence, Audit Bureau of Circulations and public documents.

TOP 10 CABLE NETWORK COMPANIES

RANK	MEDIA COMPANY	NET CABLE REVENUE	% CHANGE
1	Time Warner	\$7,774	10.0
2	Viacom	5,595	19.4
3	Walt Disney Co.	5,523	18.1
4	News Corp.	2,313	18.0
5	NBC Universal (General Electric Co.)	1,984	7.8
6	Discovery Communications	1,264	12.8
7	Cablevision Systems Corp.	979	12.2
8	Comcast Corp.	885	15.7
9	A&E Television Networks	882	7.2
10	Lifetime Entertainment Services	802	1.9

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap91c or [CLICK HERE](#)

TOP 10 CABLE SYSTEM/DBS COMPANIES

RANK	MEDIA COMPANY	NET SYSTEM REVENUE	SUBSCRIBERS
1	Comcast Corp.	\$16,607	21.5
2	Time Warner	7,699	10.9
3	DirecTV Group	7,696	12.2
4	Cox Enterprises	5,759	6.6
5	EchoStar Communications Corp.	5,410	9.4
6	Charter Communications	4,819	6.5
7	Adelphia Communications Corp.	3,584	5.4
8	Cablevision Systems Corp.	2,715	2.9
9	Advance Publications	1,585	2.1
10	MediaCom Communications Corp.	1,005	0.6

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap91c or [CLICK HERE](#)

From 100 Leading Media Cos. (AA, Aug. 23, 2004). Calendar 2003 media revenue are U.S.-only media distribution businesses supported by advertising. Figures are estimates in millions of dollars. Primary sources include BIA Financial Network, Kagan World Media, TNS Media Intelligence, Audit Bureau of Circulations and public documents.

TOP 10 BROADCAST TV COMPANIES

RANK	MEDIA COMPANY	NET TV REVENUE	% CHANGE
1	Viacom	\$7,761	4.1
2	NBC Universal (General Electric Co.)	6,193	-4.5
3	Walt Disney Co.	4,806	7.3
4	News Corp.	4,422	4.3
5	Tribune Co.	1,323	8.3
6	Univision Communications	1,059	6.7
7	Sinclair Broadcast Group	724	-1.0
8	Gannett Co.	720	-6.7
9	Hearst Corp.	687	-4.8
10	Time Warner	660	12.1

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap91b or [CLICK HERE](#)

TOP 10 RADIO COMPANIES

RANK	MEDIA COMPANY	NET RADIO REVENUE	% CHANGE
1	Clear Channel Communications	\$3,695	-0.6
2	Viacom	2,098	-1.1
3	Walt Disney Co.	612	5.7
4	Westwood One	539	-2.1
5	Cox Enterprises	426	1.2
6	Entercom Communications Corp.	401	2.5
7	Citadel Broadcasting Corp.	345	11.6
8	Radio One	303	2.5
9	Cumulus Media	282	11.6
10	Emmis Communications Corp.	280	9.8

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap91d or [CLICK HERE](#)

TOP MEDIA COMPANIES BY SECTOR

From 100 Leading Media Cos. (AA, Aug. 23, 2004). Estimated 2003 media revenue in millions of dollars is U.S.-only and from media distribution businesses supported by advertising. Sources include BIA Financial Network, Kagan World Media, TNS Media Intelligence, Audit Bureau of Circulations. Yellow Pages data are directory divisions (yellow and white pages) collected from annual reports. *Dex Media revenue is pro forma for 2003. Dex, formerly Qwest Dex, was purchased in late 2003 by Carlyle Group and Welsh, Carson, Anderson & Stowe.

TOP 3 OUTDOOR COMPANIES

RANK	MEDIA COMPANY	NET OUTDOOR REVENUE	% CHANGE
1	Clear Channel Communications	\$2,175	16.9
2	Viacom	1,748	7.0
3	Lamar Advertising Co.	810	4.4

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap91h or [CLICK HERE](#)

TOP 3 INTERNET COMPANIES

RANK	MEDIA COMPANY	NET INTERNET AD REVENUE	% CHANGE
1	Time Warner	\$8,600	-5.4
2	Yahoo! Inc.	1,355	68.0
3	Google	962	176.5

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap91f or [CLICK HERE](#)

FREE-STANDING INSERT COMPANIES

RANK	MEDIA COMPANY	NET FSI REVENUE	% CHANGE
1	Valassis Communications	\$878	7.5
2	News America Marketing (News Corp.)	624	15.6

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap91h or [CLICK HERE](#)

YELLOW PAGES COMPANIES

RANK	COMPANY	NET DIRECTORY REVENUE	% CHANGE
1	SBC Communications	\$4,478	-4.4
2	Verizon Communications	4,114	-4.0
3	BellSouth	1,906	-5.6
4	Dex Media*	1,631	5.4
5	Yellow Book USA (Yell Group)	1,023	32.2

TOP 10 MAGAZINES BY AD PAGES

From the DataCenter (AA, Jan. 17, 2005). Ranks U.S. consumer magazines by ad pages January through December 2004 from Publishers Information Bureau. Published quarterly.

RANK	MAGAZINE	AD PAGES	% CHANGE
1	People	3,622.82	-2.2
2	Forbes	3,469.95	11.3
3	The New York Times Magazine	3,467.89	3.1
4	Fortune	3,404.81	11.5
5	InStyle	3,368.93	10.6
6	BusinessWeek	3,163.53	4.2
7	Vogue	3,011.11	1.8
8	Bridal Guide	2,797.74	-10.6
9	New York Magazine	2,651.98	7.9
10	Time	2,612.48	10.3

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aaq30v or [CLICK HERE](#)

TOP 10 MAGAZINES BY GROSS REVENUE

From the Magazine 300 Special Report (AA, Sept. 20, 2004). Table ranks magazines by 2003 gross revenue, the combination of circulation and ad revenue. Revenue figures are Ad Age estimates. Average paid subscribers for six months ending Dec. 31, 2003 from Audit Bureau of Circulations. The next edition of this Special Report will be published Sept. 26, 2005.

RANK	MAGAZINE	TOTAL GROSS REVENUE	PAID SUBSCRIBERS
1	People	\$1,235.1	3,603,115
2	Sports Illustrated	936.2	3,210,040
3	Time	920.8	4,112,311
4	TV Guide	916.6	9,009,571
5	Better Homes & Gardens	836.3	7,606,820
6	Parade	617.2	34,286,728
7	Newsweek	597.9	3,122,407
8	Reader's Digest	563.7	11,044,694
9	Good Housekeeping	520.0	4,755,893
10	Woman's Day	440.1	4,279,375

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TOP 10 NEWSPAPERS BY AD REVENUE

Table ranks newspapers by ad revenue, January through December 2003. Data are from TNS Media Intelligence. Dollars are in millions. Data on newspapers companies are detailed in Ad Age's 100 Leading Media companies Special Report (AA, Aug. 23, 2004)

RANK	NEWSPAPER	AD REVENUE	% CHANGE
1	Los Angeles Times	\$1,500.9	2.8
2	The New York Times	1,354.4	9.4
3	Chicago Tribune	1,070.1	30.2
4	The Wall Street Journal	1,003.3	3.0
5	The Washington Post	704.9	8.8
6	USA Today	667.5	10.9
7	The Dallas Morning News	663.0	-7.1
8	The Boston Globe	564.1	10.8
9	Newsday	537.5	5.9
10	San Francisco Chronicle	529.9	26.2

TOP 10 NEWSPAPERS BY CIRCULATION

From twice yearly newspaper circulation rankings in Ad Age. Table ranks U.S. newspapers by average weekday circulation for six-months ended September 30, 2004, from Audit Bureau of Circulations. *Figures adjusted by Ad Age to indicate average weekday circulation.

RANK	NEWSPAPER	CIRCULATION	% CHANGE
1	USA Today	2,220,863	3.1
2	The Wall Street Journal	2,106,774	0.8
3	The New York Times	1,121,057	0.2
4	Los Angeles Times	902,164	-5.6
5	New York Daily News	715,052	-1.6
6	The Washington Post	707,690	-3.0
7	New York Post	686,207	5.2
8	Chicago Tribune*	599,528	-2.3
9	Houston Chronicle	554,783	0.3
10	San Francisco Chronicle*	480,587	-6.3

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aaq10x or [CLICK HERE](#)

TOP 10 SYNDICATED TV SHOWS

Table ranks TV shows in syndication by ad revenue, January through December 2003. Data are from TNS Media Intelligence. Dollars are in millions. Figures exclude ad revenue from shows currently in first-run distribution.

RANK	SYNDICATED TV SHOW	AD REVENUE	% CHANGE
1	Friends	\$225.4	12.0
2	Seinfeld	155.5	-25.8
3	Everybody Loves Raymond	138.7	26.3
4	Will & Grace	129.5	182.2
5	Entertainment Tonight	103.4	7.6
6	Oprah Winfrey Show	101.7	3.2
7	That '70s Show	91.6	347.1
8	Entertainment Tonight Weekend	90.3	185.5
9	Judge Judy	72.3	-3.1
10	Extra Entertainment Magazine	66.7	5.5

TOP 10 WEB SITES BY AD REVENUE

Table ranks parent Internet web sites by ad revenue January through December 2003. Data are from TNS Media Intelligence. Dollars are in millions. Web sites include all same-branded sites. Yahoo includes Yahoo Sports and Yahoo, for example.

RANK	WEB SITE	AD REVENUE	% CHANGE
1	Yahoo	\$1,302.0	67.7
2	America Online	670.5	36.5
3	Microsoft Network	636.3	41.2
4	CNET	157.5	48.8
5	Netscape	154.3	-37.7
6	Altavista	142.2	58.7
7	Excite Network	140.3	-6.8
8	ESPN Internet Group	116.4	28.6
9	Lycos Network	113.3	10.6
10	Ebay	110.6	2.2

There are many ways to reach women
in daytime and early fringe.
But why bother with more than three?



TV NETWORK AD REVENUE

Networks are ranked by ad revenue in millions for calendar 2003 from TNS Media Intelligence. *NBC Universal is owned by General Electric Co. which also owns 50% of Paxson Communications Corp. **22.3% of WB is owned by Tribune Co. ***From the Cable TV Special Report (AA, May 31, 2004). The next edition of this Special Report will be published June 6, 2005.

RANK	NETWORK (PARENT)	AD REVENUE	% CHANGE
BROADCAST TV			
1	CBS (Viacom)	\$5,828	7.8
2	NBC* (NBC Universal)	5,576	-12.9
3	ABC (Walt Disney Co.)	5,127	14.3
4	FOX (News Corp.)	3,001	1.4
5	WB** (Time Warner)	1,024	19.5
6	UPN (Viacom)	505	8.0
7	PAX* (Paxson Communications Corp.)	162	-27.6

CABLE***

1	ESPN (80% Walt Disney Co.; 20% Hearst Corp.)	\$1,164	26.4
2	Nickelodeon (Viacom)	844	12.9
3	MTV (Viacom)	836	13.3
4	Lifetime (50% Disney; 50% Hearst)	832	17.0
5	TBS (Time Warner)	753	12.8
6	TNT (Time Warner)	730	16.0
7	USA Network (NBC Universal)	567	33.3
8	CNN (Time Warner)	424	20.4
9	CNBC (NBC Universal)	423	-16.7
10	Discovery Channel (Discovery Communications)	413	4.9

SPANISH-LANGUAGE TV NETWORKS

1	Univision (Univision Communications)	\$1,547	2.6
2	Telemundo (NBC Universal)	938	21.2
3	TeleFutura (Univision Communications)	241	183.8

SUPER BOWL SPOT COSTS

From AdAge.com. Table presents average prices for 30-second spots in the Super Bowls. Rating is percentage of U.S. households. Data from Ad Age reports and Nielsen Media Research. Ad costs in this table are actual dollars. In 1967 the Super Bowl was shown on both CBS and NBC.

YEAR	AVERAGE :30 SPOT COST	NETWORK	RATING	VIEWERS
2005	\$2,400,000	FOX	41.1	86,100,000
2004	2,250,000	CBS	41.4	89,795,000
2003	2,100,000	ABC	40.7	88,637,000
2002	1,900,000	FOX	40.4	86,801,000
2001	2,050,000	CBS	40.4	84,335,000
2000	2,100,000	ABC	43.3	88,465,000
1999	1,600,000	FOX	40.2	83,720,000
1998	1,300,000	NBC	44.5	90,000,000
1997	1,200,000	FOX	43.3	87,870,000
1996	1,100,000	NBC	46.0	94,080,000
1995	1,000,000	ABC	41.3	83,420,000
1994	900,000	NBC	45.5	90,000,000
1993	850,000	NBC	45.1	90,990,000
1992	800,000	CBS	40.3	79,590,000
1991	800,000	ABC	41.9	79,510,000
1990	700,000	CBS	39.0	73,852,000
1989	675,000	NBC	43.5	81,590,000
1988	600,000	ABC	41.9	80,140,000
1987	575,000	CBS	45.8	87,190,000
1986	550,000	NBC	48.3	92,570,000

YEAR	AVERAGE :30 SPOT COST	NETWORK	RATING	VIEWERS
1985	\$500,000	ABC	46.4	85,530,000
1984	450,000	CBS	46.4	77,620,000
1983	400,000	NBC	48.6	81,770,000
1982	345,000	CBS	49.1	85,230,000
1981	324,300	NBC	44.4	68,290,000
1980	275,000	CBS	46.3	76,240,000
1979	222,000	NBC	47.1	74,740,000
1978	185,000	CBS	47.2	78,940,000
1977	162,000	NBC	44.4	62,060,000
1976	125,000	CBS	42.3	57,710,000
1975	110,000	NBC	42.4	56,050,000
1974	107,000	CBS	41.6	51,700,000
1973	103,500	NBC	42.7	53,320,000
1972	86,000	CBS	44.2	56,640,000
1971	72,000	NBC	39.9	45,960,000
1970	78,200	CBS	39.4	44,270,000
1969	67,500	NBC	36.0	NA
1968	54,000	CBS	36.8	NA
1967	42,000	CBS+NBC	40.8	NA

To purchase a more comprehensive view of this table, go to AdAge.com QwikFIND aaq24y or [CLICK HERE](#)

AGENCY REPORT

World's top marketing organization by revenue

OMNICOM GROUP NOTCHES \$8.62 BILLION IN '03

Top core U.S. agency brand by revenue

JWT HITS \$456.2 MILLION

World's top core agency brand by revenue

DENTSU COLLECTS \$1.86 BILLION

Top U.S. Hispanic agency by revenue

BROMLEY RECORDS \$32.9 MILLION

Top media specialist company by worldwide billings

OMD WORLDWIDE BAGS \$19.34 BILLION

Top marketing organization by worldwide media billings

PUBLICIS GROUPE AMASSES \$34.40 BILLION

Content, methodologies for ad agencies

AMONG THE MANY CHARTS OF THE 60TH annual Agency Report are rankings of the world's top marketing organizations (Page 48); leading U.S. ad agency core "brands" (Page 50); and U.S. agency rankings by multicultural specialty (Page 58).

Marketing organizations are typically publicly-held holding companies; their financial data are from public documents or supplied voluntarily. Agency brands of the world's top four marketing organizations (Pages 46-47) hold more than 60% of the global agency business.

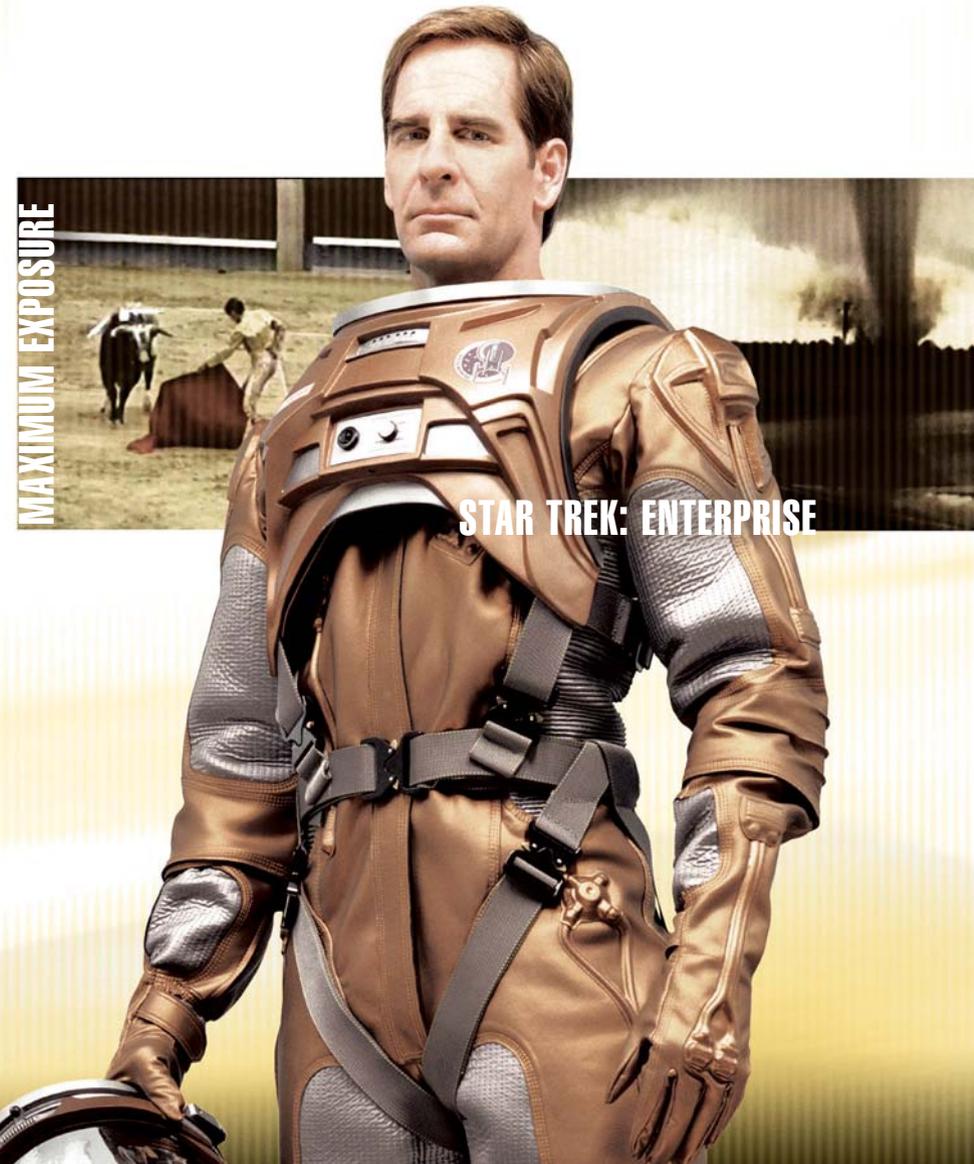
Agency brands in the U.S. include traditional ad agencies, healthcare and business-to-business shops. "Branding" identifies the core agency by stripping contributions from subsidiaries and specialty units. Rankings of specialty units, interactive, direct marketing and sales promotion shops (Pages 54-57) come from Ad Age's Marketing Services Report (AA, May 17, 2004).

Billings of media units at publicly-held companies (Pages 52-53) are Recma Institute estimates; billings for U.S. independents are considered Ad Age estimates.

There's a reason why men call themselves "Weekend Warriors."



MAXIMUM EXPOSURE



MAJOR NETWORKS, AGENCIES OF TOP FOUR MARKETING ORGANIZATIONS

U.S.-BASED AGENCIES COLOR CODED BY DISCIPLINE

1. Omnicom Group

BBDO Worldwide

AtmosphereBBDO
BBDO Detroit CRM

DDB Worldwide Communications

TBWA Worldwide

Other Omnicom agencies

Agency.com
1Health Communications
Alcone Marketing Group
Arnell Group
Bernard Hodes Group
Cline, Davis & Mann
Corbett Accel Healthcare Group
Dieste, Harmel & Partners
Doremus & Co.
Eden Communications Group
Element 79 Partners
GMR Marketing
Goodby, Silverstein & Partners
Gizzard Communications Group
GSD&M
Harrison & Star Business Group
Integer Group
Ketchum Directory Advertising
KPR
Lieber, Levett, Koenig, Farese, Babcock
Lyons Lavey Nickel Swift
Martin/Williams
Merkley & Partners
OMD Worldwide
Organic
PHD
Rapp Collins Worldwide
Russ Reid Co.
Targetbase

TracyLocke
U.S. Marketing & Promotions Agency
Zimmerman & Partners

2. WPP Group

Red Cell

Berlin Cameron/Red Cell
Cole & Weber/Red Cell

JWT

Connect@jwt
JWT Specialized Communications
JWT Technology

Ogilvy & Mather Worldwide

141 Worldwide
OgilvyOne Worldwide

Y&R

Bravo Group
Kang & Lee
Mosaica
SicolaMartin
Sudler & Hennessey
Wunderman

Other WPP agencies

Brouillard Communications
CommonHealth
Einson Freeman
Glendinning
Mediaedge:cia
Mendoza Dillon & Asociados
MindShare
Ogilvy Healthworld
RTC Relationship Marketing
UniWorld Group
VML

3. Interpublic Group of Cos.

Foote Cone & Belding Worldwide

FCB HealthCare
FCBi
Hacker Group
Marketing Drive Worldwide
R/GA

Lowe & Draft Partnership

Berenter Greenhouse & Webster
Dailey & Associates
Draft
Lowe Worldwide
Lowe Healthcare Worldwide
Media First International
Mullen
Tierney Communications
Zipatoni Co.

McCann Worldgroup

Adair-Greene
Austin Kelley
Avrett, Free & Ginsberg
Campbell Mithun
Cash Plus Media Services
Gillespie
McCann Erickson Worldwide
Momentum Worldwide
MRM Partners
Nationwide Advertising Service
TM Advertising
Torre Lazur McCann Healthcare Worldwide
Universal McCann Worldwide

Other Interpublic agencies

Analytici
Botsford Group
Campbell-Ewald

Carmichael Lynch
Deutsch
Gotham
Hill, Holliday, Connors, Cosmopolus
Initiative Media Worldwide
Jack Morton Worldwide
Martin Agency
Octagon

4. Publicis Groupe

Leo Burnett Worldwide

Arc Worldwide
Chemistri
Frankel
Lapiz
Semaphore Partners
Vigilante
Williams-Labadie

Publicis Worldwide

Publicis Dialog

Saatchi & Saatchi

Conill Advertising
Team One Advertising

Other Publicis Groupe agencies

Fallon Worldwide
Kaplan Thaler Group
Klemtner Advertising
Medicus Group International
Nelson Communications Worldwide
Starcom MediaVest Worldwide
ZenithOptimedia

COLOR CODES BY DISCIPLINE

Global Network
Traditional agency Media specialist
Multicultural specialist Healthcare
Direct, promotion, & interactive

Not all agencies owned by the companies are shown. Agencies shown may be partly owned. A diagram illustrating ownership of agencies of the top 6 marketing organizations appeared as a pullout poster in the Agency Report (AA, April 19,

2004) and can be downloaded from AdAge.com QwikFIND aan55n. The diagram, presented as a family tree, includes revenue for agencies and media specialist companies, as well as ownership equity.

TOP 25 MARKETING ORGANIZATIONS

From the Agency Report (AA, April 19, 2004). Table ranks marketing organizations by their worldwide revenue in 2003. No. 2 WPP is expected to complete its acquisition of No. 7 Grey in the first quarter of 2005. Dollars are in millions. The next edition of this Special Report will be published May 2, 2005. *Figures are Ad Age estimates.

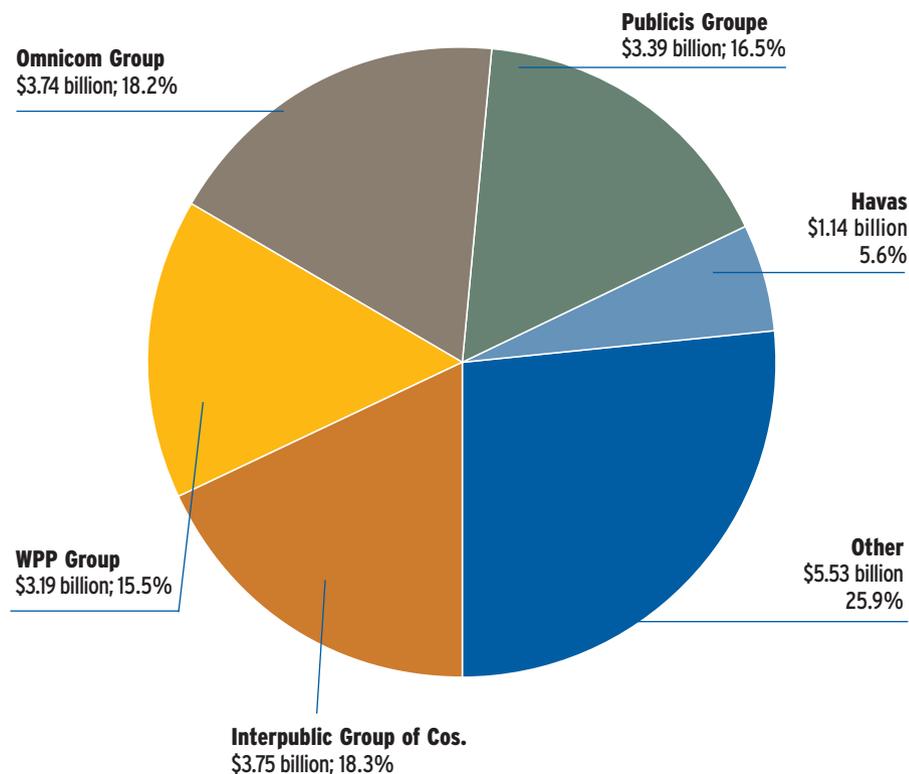
RANK	MARKETING ORGANIZATION	WORLDWIDE REVENUE	% CHANGE
1	Omnicom Group	\$8,621.4	14.4
2	WPP Group	6,756.1	16.9
3	Interpublic Group of Cos.	5,863.4	-5.5
4	Publicis Groupe	4,408.9	7.3
5	Dentsu	2,545.0	11.0
6	Havas	1,877.5	-0.6
7	Grey Global Group	1,307.3	9.0
8	Hakuhodo DY Holdings*	1,208.1	NA
9	Aegis Group	1,067.4	21.9
10	Asatsu-DK	413.9	16.8
11	Carlson Marketing Group	322.4	-1.9
12	Incepta Group	254.1	5.5
13	Monster Worldwide	241.5	-11.4
14	HealthSTAR Communications	233.0	29.4
15	Digitas	209.5	2.7
16	MDC Partners	193.7	12.8
17	Tokyu Agency	181.6	0.6
18	Cheil Communications	173.0	4.8
19	SBI Group	150.0	70.5
20	George P. Johnson Co.	150.0	0.5
21	Doner	137.0	12.8
22	Aspen Marketing Group	134.0	7.2
23	Alloy	128.0	26.5
24	Clemenger Communications	125.7	24.6
25	Select Communications*	120.0	9.1

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AGENCY BUSINESS MARKET SHARE

From the Agency Report (AA, April 19, 2004). Shares based on \$20.54 billion worldwide revenue from core agency advertising and media activities. Disciplines such as direct marketing, sales promotion, healthcare, interactive, public relations, research and non-advertising units are excluded. All figures are Ad Age estimates for calendar 2003.

FIVE GROUPS DOMINATE GLOBAL ADVERTISING AND MEDIA



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TOP 25 U.S. AGENCY BRANDS

From the Agency Report (AA, April 19, 2004). Table ranks core agencies by U.S. revenue in 2003 (in millions). The agency "core" excludes revenue from billed media, and specialty subsidiaries. *Estimate. Parent company WPP is expected to complete its acquisition of Grey by the end of the first quarter of 2005.

RANK	AGENCY BRAND	U.S. REVENUE	% CHANGE
1	JWT* (WPP)	\$456.2	15.9
2	Leo Burnett Worldwide* (Publicis)	404.2	6.6
3	McCann Erickson Worldwide* (Interpublic)	300.4	0.1
4	BBDO Worldwide* (Omnicom)	279.1	10.8
5	Grey Worldwide* (Grey)	270.5	14.5
6	DDB Worldwide Communications* (Omnicom)	252.3	6.9
7	Ogilvy & Mather Worldwide* (WPP)	235.6	17.7
8	Foote Cone & Belding Worldwide* (Interpublic)	221.6	0.6
9	Y&R* (WPP)	215.7	12.8
10	Publicis Worldwide* (Publicis)	200.9	12.2
11	Saatchi & Saatchi* (Publicis)	195.6	10.9
12	Euro RSCG Worldwide* (Havas)	194.1	1.4
13	Deutsch* (Interpublic)	167.2	5.7
14	Arnold Worldwide* (Havas)	150.2	-7.3
15	Campbell-Ewald* (Interpublic)	146.3	-3.3
16	Lowé Worldwide* (Interpublic)	133.8	-6.8
17	TBWA Worldwide* (Omnicom)	125.6	10.2
18	Doner	122.7	11.8
19	Richards Group	114.5	11.1
20	Hill, Holliday, Connors, Cosmopolos* (Interpublic)	102.6	1.6
21	Campbell Mithun* (Interpublic)	95.7	0.2
22	RPA	92.6	1.3
23	Dailey & Associates* (Interpublic)	89.2	-1.1
24	Zimmerman & Partners* (Omnicom)	85.6	6.5
25	Fallon Worldwide* (Publicis)	82.2	11.2

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WORLD'S TOP 10 CORE AGENCY BRANDS

From the Agency Report (AA, April 19, 2004). Table ranks ad agencies by estimated 2003 worldwide revenue in millions. *Estimates exclude revenue from billed media and specialty subsidiaries.

RANK	AGENCY	WORLDWIDE REVENUE	% CHANGE
1	Dentsu*	\$1,864.1	29.2
2	BBDO Worldwide* (Omnicom)	1,237.5	16.4
3	McCann Erickson Worldwide* (Interpublic)	1,220.1	3.7
4	JWT* (WPP)	1,178.5	18.2
5	Publicis Worldwide* (Publicis)	1,021.6	5.9
6	DDB Worldwide Communications* (Omnicom)	943.4	15.8
7	Leo Burnett Worldwide* (Publicis)	886.5	10.6
8	TBWA Worldwide* (Omnicom)	771.0	15.8
9	Euro RSCG Worldwide* (Havas)	756.1	3.1
10	Ogilvy & Mather Worldwide* (WPP)	706.3	19.8

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WORLD'S TOP 10 INDIE NETWORKS

From the Agency Report (AdAge.com, April 19, 2004). Table ranks worldwide independent agency networks. Dollars are in millions. Networks tend to have loosely affiliated structures with central secretariats. *ICP is estimated.

RANK	INDEPENDENT NETWORK	WORLDWIDE REVENUE	% CHANGE
1	Worldwide Partners	\$556.0	22.8
2	ICOM (International Communications Agency Network)	363.0	19.8
3	AMIN (Advertising & Marketing Intl Network)	345.3	6.4
4	IN (Independent Network)	268.0	-5.0
5	MAGNET (Marketing & Advertising Global Network)	213.8	6.6
6	ComVort Group	137.0	NA
7	BBN International Brand Communication	107.0	-0.9
8	TAAN (Transworld Advertising Agency Network)	101.0	2.1
9	Interpartners Communications	100.0	9.9
10	ICP* (Independent Creative Partners)	85.0	2.4

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND AAP55L or [CLICK HERE](#)

TOP MEDIA SPECIALIST COMPANIES

From the Agency Report (AA, April 19, 2004). Tables rank media specialist companies by 2003 billings in billions of dollars. Data are compiled by Recma Institute, Paris, which collects, analyzes and publishes intelligence on a worldwide basis on media specialist companies.

BY WORLDWIDE BILLINGS

RANK	MEDIA SPECIALIST COMPANY	WORLDWIDE BILLINGS	% CHANGE
1	OMD Worldwide	\$19.34	7.9
2	MindShare Worldwide	19.16	11.1
3	Starcom MediaVest Group	18.87	6.9
4	Carat	17.77	4.3
5	ZenithOptimedia	15.53	2.1
6	Universal McCann Worldwide	15.14	3.3
7	Mediaedge:cia Worldwide	14.63	8.8
8	MediaCom	13.56	7.2
9	Initiative Media Worldwide	12.55	-2.4
10	MPG	8.63	10.7

BY BILLINGS OUTSIDE THE U.S.

RANK	MEDIA SPECIALIST COMPANY	BILLINGS OUTSIDE THE U.S.	% CHANGE
1	Carat	\$13.05	4.4
2	OMD Worldwide	11.01	11.0
3	MindShare Worldwide	9.76	13.6
4	Mediaedge:cia Worldwide	9.36	9.7
5	ZenithOptimedia	8.75	1.1
6	MediaCom	8.56	7.4
7	Universal McCann Worldwide	7.75	2.6
8	Initiative Media Worldwide	7.47	5.1
9	Starcom MediaVest	7.01	0.8
10	MPG	5.78	16.8

BY U.S. BILLINGS

RANK	MEDIA SPECIALIST COMPANY	U.S. BILLINGS	% CHANGE
1	MindShare Worldwide	\$9.40	8.7
2	OMD Worldwide	8.33	4.1
3	Starcom	7.51	3.1
4	Universal McCann Worldwide	7.40	4.2
5	Mediaedge:cia Worldwide	5.27	7.4
6	Initiative Media Worldwide	5.08	-11.7
7	MediaCom	5.00	7.0
8	Carat North America	4.72	4.1
9	MediaVest	4.36	11.7
10	Zenith Media	4.36	3.7

PARENT COMPANIES OF MEDIA SPECIALISTS

RANK	COMPANY	WORLDWIDE BILLINGS	% CHANGE
1	Publicis Groupe	\$34.40	4.3
2	WPP Group	33.79	10.1
3	Interpublic Group of Cos.	29.39	0.6
4	Omnicom Group	24.26	7.3
5	Aegis Group	19.64	15.3
6	Grey Global Group	13.56	7.2
7	Havas	8.63	10.7
8	Horizon Media	0.99	9.4
9	Active International	0.86	14.0
10	R. J. Palmer	0.59	4.8

TOP INTERACTIVE AGENCIES

From the Marketing Services Rankings (AA, May 17, 2004). Tables on this page are rankings by 2003 U.S. interactive revenue in thousands. *Indicates figures are Ad Age estimates. **aQuantive in July 2004 acquired SBI.Razorfish, creating a new agency brand called Avenue A/Razorfish. Leading marketing organizations (the top chart) do not break out revenue by agency, but they provide discipline breakouts from which Ad Age estimates segments such as interactive.

FROM MARKETING ORGANIZATIONS

RANK	MARKETING ORGANIZATION	U.S. INTERACTIVE REVENUE	% CHANGE
1	Interpublic Group of Cos.*	\$129,000	2.1
2	WPP Group*	94,000	4.4
3	Havas*	89,000	2.8
4	Omnicom Group*	64,000	20.1
5	Grey Global Group*	55,000	1.9

FROM INDEPENDENT AGENCIES

RANK	AGENCY	U.S. INTERACTIVE REVENUE	% CHANGE
1	Digitas	\$84,000	17.5
2	SBI.Razorfish**	72,150	64.4
3	Modem Media*	49,000	-13.9
4	aQuantive (Avenue A)**	44,452	16.4
5	AKQA	36,000	20.0
6	Critical Mass*	34,000	6.3
7	TMP Worldwide	26,108	7.8
8	Carat Interactive	25,000	19.0
9	IconNicholson	24,000	14.3
10	IMC2	23,700	44.5
11	Macquarium Intelligent Communications	23,500	4.0
12	Planning Group International	22,000	36.6
13	Fry	21,000	0.0
14	Medical Broadcasting Co.	19,550	54.1
15	Blue Dingo	18,000	5.9

To purchase a more comprehensive ranking, go to AdAge.com QwikFIND aap62i or [CLICK HERE](#)

TOP DIRECT MARKETING AGENCIES

From the Marketing Services Rankings (AA, May 17, 2004). Tables are rankings by 2003 U.S. direct marketing revenue in thousands. *Indicates estimate. Leading marketing organizations (the top chart) do not break out revenue by agency, but they provide discipline breakouts from which Ad Age estimates segments such as direct marketing. Thus two rankings are required for segment overview, the top by discipline representing multiple shops, and the lower by independent agencies.

FROM MARKETING ORGANIZATIONS

RANK	MARKETING ORGANIZATION	U.S. DIRECT MARKETING REVENUE	% CHANGE
1	WPP Group*	\$419,200	2.2
2	Omnicom Group*	376,000	6.2
3	Interpublic Group of Cos.*	335,000	0.1
4	Publicis Groupe*	161,500	0.4
5	Havas*	83,700	-3.7

FROM INDEPENDENT AGENCIES

RANK	AGENCY	U.S. DIRECT MARKETING REVENUE	% CHANGE
1	Digitas	\$125,500	-5.3
2	PGI	110,000	4.8
3	Aspen Marketing Services	99,000	8.8
4	ChoicePoint Precision Marketing	96,600	-8.7
5	SourceLink	90,000	0.0
6	TMP Worldwide	78,155	-6.0
7	Carlson Marketing Group	76,612	3.2
8	Protocol Direct Marketing	70,000	2.5
9	Merkle Direct Marketing	64,250	13.6
10	Harte-Hanks Direct	60,931	7.9
11	Data Marketing	57,000	11.8
12	Accent Marketing Services	45,830	40.0
13	Alloy	45,300	15.9
14	Ambrosi	42,000	16.7
15	MKTG Services*	40,000	2.6

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TOP SALES PROMOTION AGENCIES

From the Marketing Services Rankings (AA, May 17, 2004). Tables are rankings by 2003 U.S. sales promotion revenue in thousands. *Indicates estimate. Leading marketing organizations (the top chart) do not break out revenue by agency, but they provide discipline breakouts from which Ad Age estimates segments such as sales promotion. Thus two rankings are required for segment overview, the top by discipline representing multiple shops, and the lower by independent agencies.

FROM MARKETING ORGANIZATIONS

RANK	MARKETING ORGANIZATION	U.S. SALES PROMOTION REVENUE	% CHANGE
1	Omnicom Group*	\$405,000	2.2
2	Interpublic Group of Cos.*	123,700	-11.7
3	Publicis Groupe*	75,500	-2.5
4	Havas*	70,000	-11.1
5	WPP Group*	57,000	6.5

FROM INDEPENDENT AGENCIES

RANK	AGENCY	U.S. SALES PROMOTION REVENUE	% CHANGE
1	Carlson Marketing Group	\$154,238	-11.4
2	George P. Johnson Co.	117,867	-2.1
3	SPAR Group	64,859	-6.8
4	AMP Agency (Alloy)	61,100	10.6
5	Equity Marketing*	40,203	9.0
6	DVC Worldwide	38,113	1.3
7	Flair Communications Agency*	36,800	-0.5
8	Ryan Partnership	35,537	-3.7
9	Marketing Store	35,416	1.2
10	Aspen Marketing Services	25,000	8.7
11	Gage	22,254	-38.8
12	Colangelo Synergy Marketing	20,196	9.2
13	Hawkeye Group	16,782	1.7
14	U.S. Motivation (TMP Worldwide)	13,520	2.7
15	CCM*	13,500	-10.0

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TOP HEALTHCARE AGENCIES

From the Marketing Services Rankings (AA, May 17, 2004). Tables are rankings by 2003 U.S. healthcare revenue in thousands. *Indicates estimate. Leading marketing organizations (the top chart) do not break out revenue by agency, but they provide discipline breakouts from which Ad Age estimates segments such as healthcare. Thus two rankings are required for segment overview, the top by discipline representing multiple shops, and the lower by independent agencies.

FROM MARKETING ORGANIZATIONS

RANK	MARKETING ORGANIZATION	U.S. HEALTHCARE REVENUE	% CHANGE
1	Interpublic Healthcare*	\$286,200	8.0
2	Publicis Healthcare*	274,600	6.0
3	WPP Healthcare*	272,800	9.0
4	Omnicom Healthcare*	220,500	7.5
5	Euro RSCG Life*	96,600	2.3

FROM INDEPENDENT AGENCIES

RANK	AGENCY	U.S. HEALTHCARE REVENUE	% CHANGE
1	Gerbig Snell/Weishemer	\$52,200	9.1
2	Abelson-Taylor	39,600	3.4
3	Medical Broadcasting Co.	27,900	7.8
4	Hal Lewis Group	18,200	1.5
5	Pacific Communications	17,700	-7.0
6	Dorland Global Health Communications	15,900	40.4
7	Vox Medica	15,900	-21.2
8	Palio Communications	15,500	37.1
9	Dudnyk Healthcare Group*	14,500	5.0
10	Donahoe Purohit Miller Advertising	13,800	-4.5
11	LehmanMillet	11,400	1.0
12	i-Frontier	9,700	31.6
13	Leverte Associates*	8,900	4.7
14	Strategic Medical Communications*	8,500	4.6
15	Natrel Communications	7,600	2.9

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TOP MULTICULTURAL AGENCIES

From the Agency Report (AA, April 19, 2004). Table ranks multicultural specialty agencies for calendar 2003 by U.S. revenue. Dollars are in thousands. *Indicates figures are Ad Age estimates. GlobalHue is the largest overall multicultural specialist agency in the U.S. at an estimated \$57 million in 2003—up 8.5% from \$52.5 million in 2002—but GlobalHue could not be listed in these segmented tables because the agency does not break out its figures by cultural specialty.

BY REVENUE FROM MARKETING TO HISPANICS

RANK	AGENCY	U.S. REVENUE	% CHANGE
1	Bromley Communications* (Publicis)	\$32,937	10.0
2	Bravo Group* (WPP)	31,775	14.0
3	Dieste, Harmel & Partners* (Omnicom)	23,000	37.7
4	Zubi Advertising Services	16,400	10.1
5	La Agencia de Orci & Asociados	14,160	5.1

BY REVENUE FROM MARKETING TO AFRICAN-AMERICANS

RANK	AGENCY	U.S. REVENUE	% CHANGE
1	Burrell Communications Group* (Publicis)	\$26,072	5.0
2	Carol H. Williams Advertising	25,000	66.7
3	UniWorld Group (WPP)	20,148	-15.2
4	Anderson Communications	6,500	32.7
5	Fuse (WPP)	6,038	10.2

BY REVENUE FROM MARKETING TO ASIAN-AMERICANS

RANK	AGENCY	U.S. REVENUE	% CHANGE
1	A Partnership	\$9,712	12.4
2	Kang & Lee* (WPP)	7,660	17.0
3	PanCom	5,900	3.5
4	Time Advertising	5,693	-6.6
5	IW Group (Interpublic)	5,521	-12.0

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Great movies give people a chance
to escape from everything...
except your messages, of course.



A VIACOM COMPANY

Jimmy Hollywood	Blue Chips
Addams Family Values	Indecent Proposal
Wayne's World 2	The Firm
A Very Brady Christmas	Snake Eyes
White Christmas	K-2
Big Top Pee-Wee	True Colors
Coneheads	Beverly Hills Cop III
Clear and Present Danger	First Blood
Sliding Doors	Bob Roberts

Unlike other franchises,
this one actually flies.



STAR TREK: ENTERPRISE

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