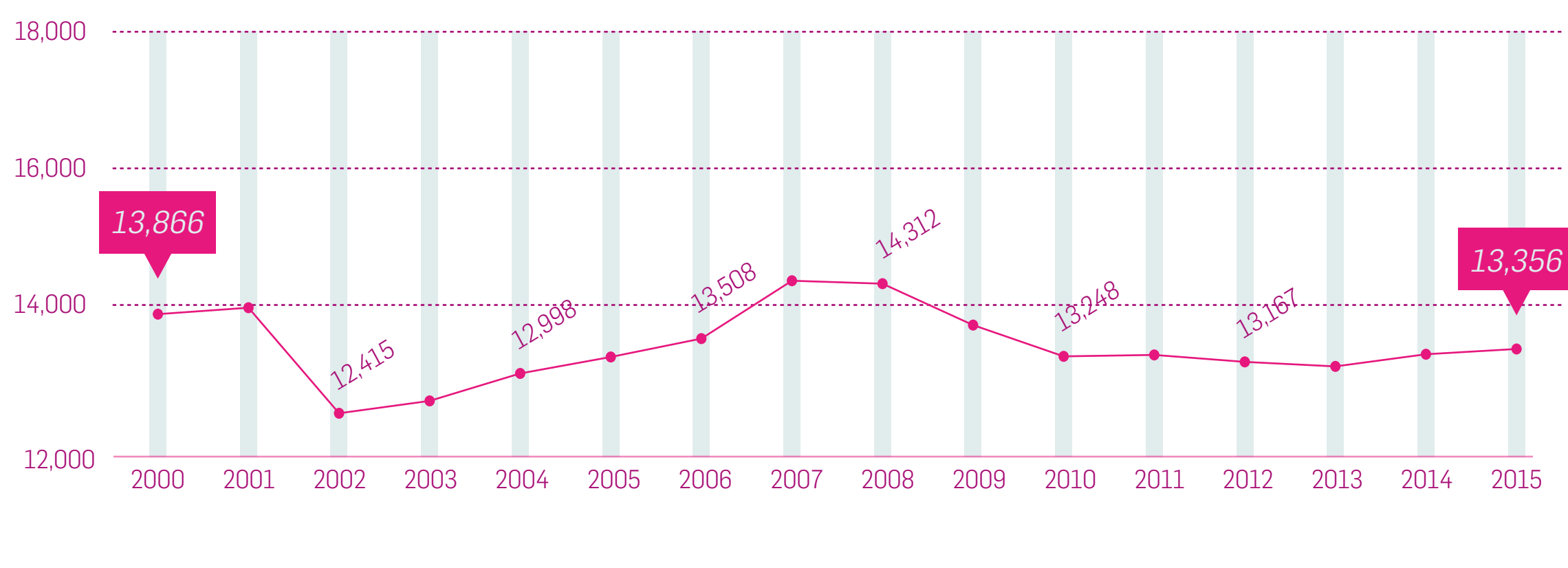


EVOLUTION

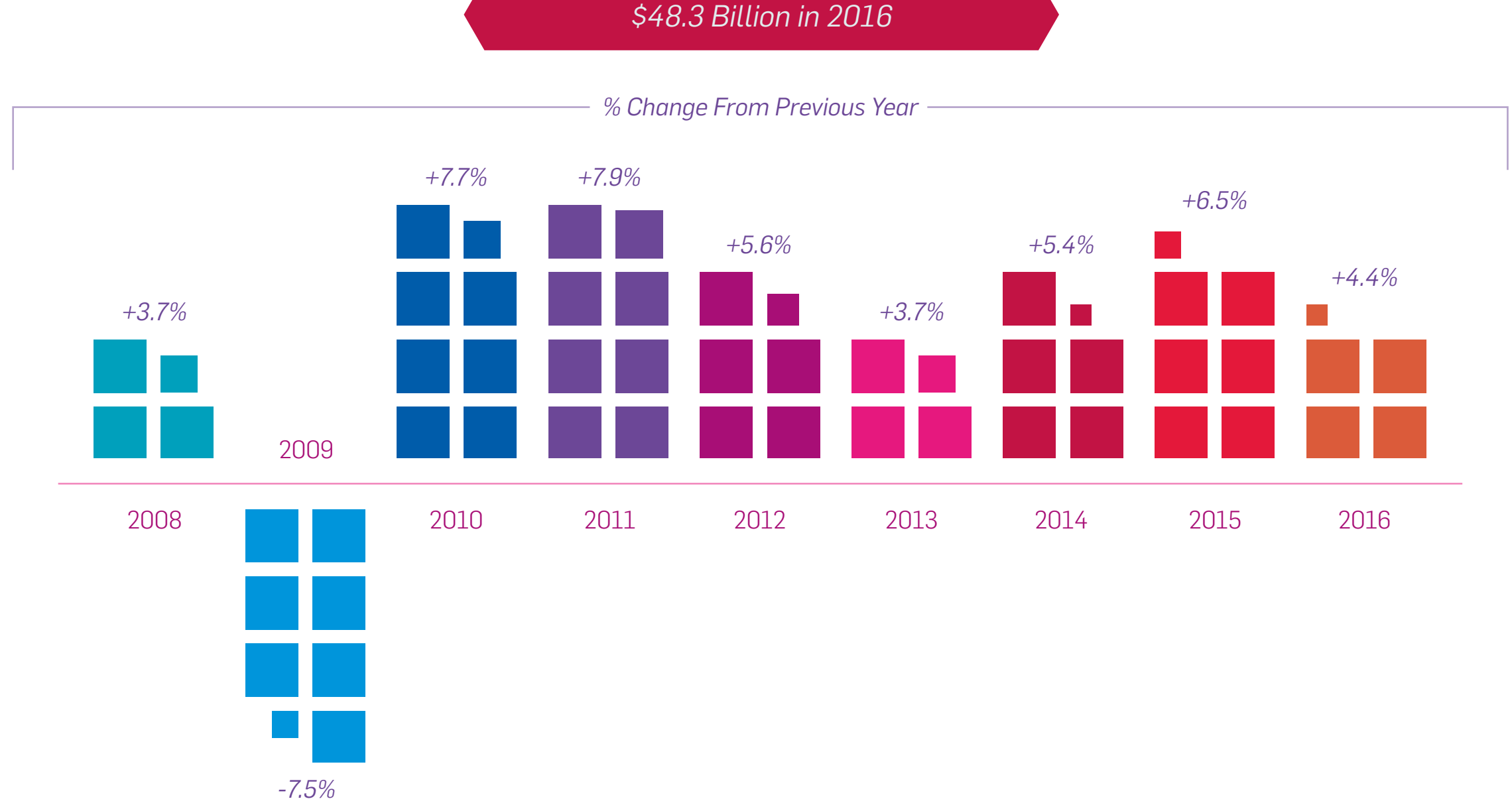
OF THE ADVERTISING AGENCY BUSINESS

NUMBER of Agencies in the U.S.

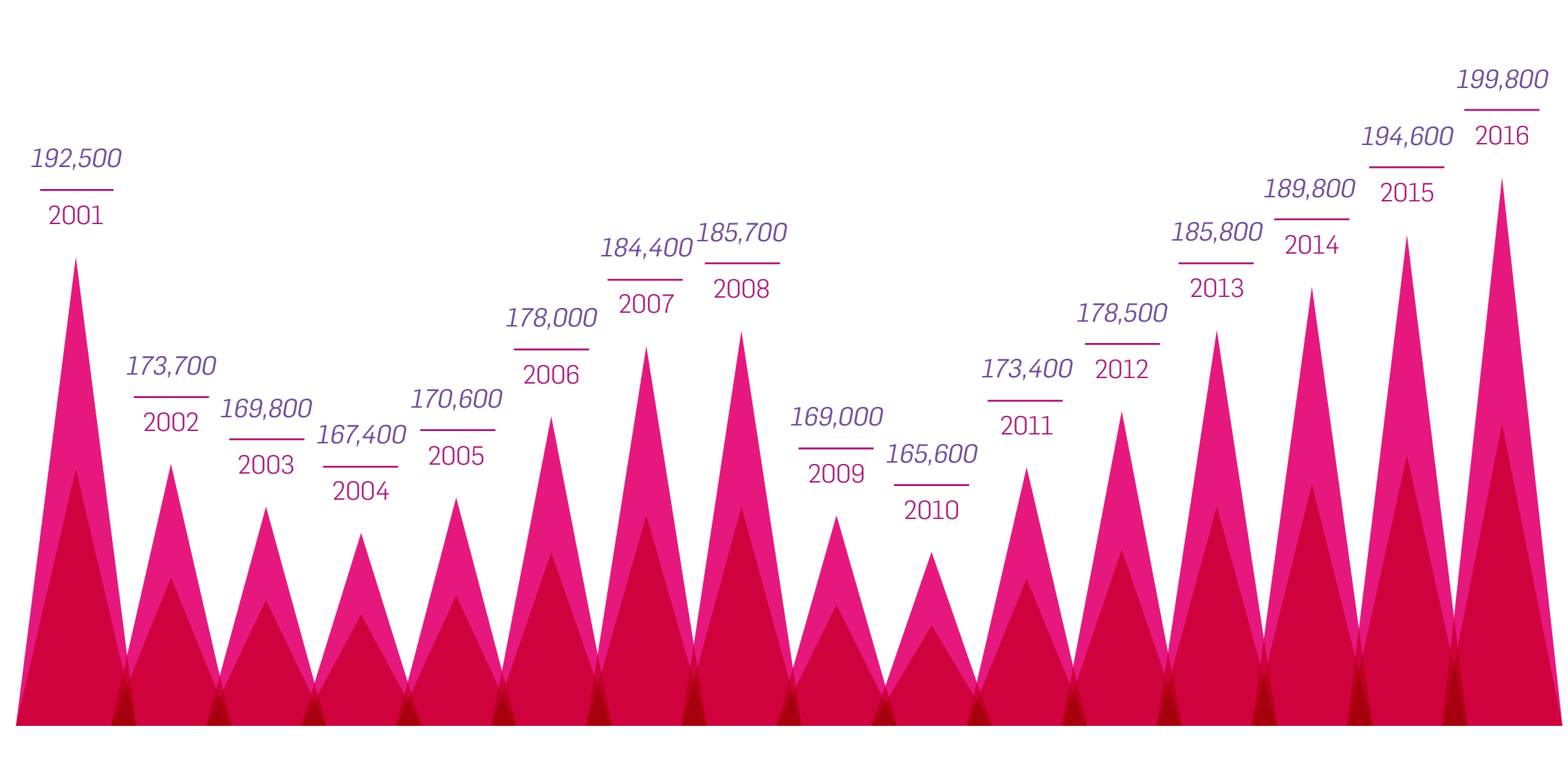


U.S. Agency REVENUE

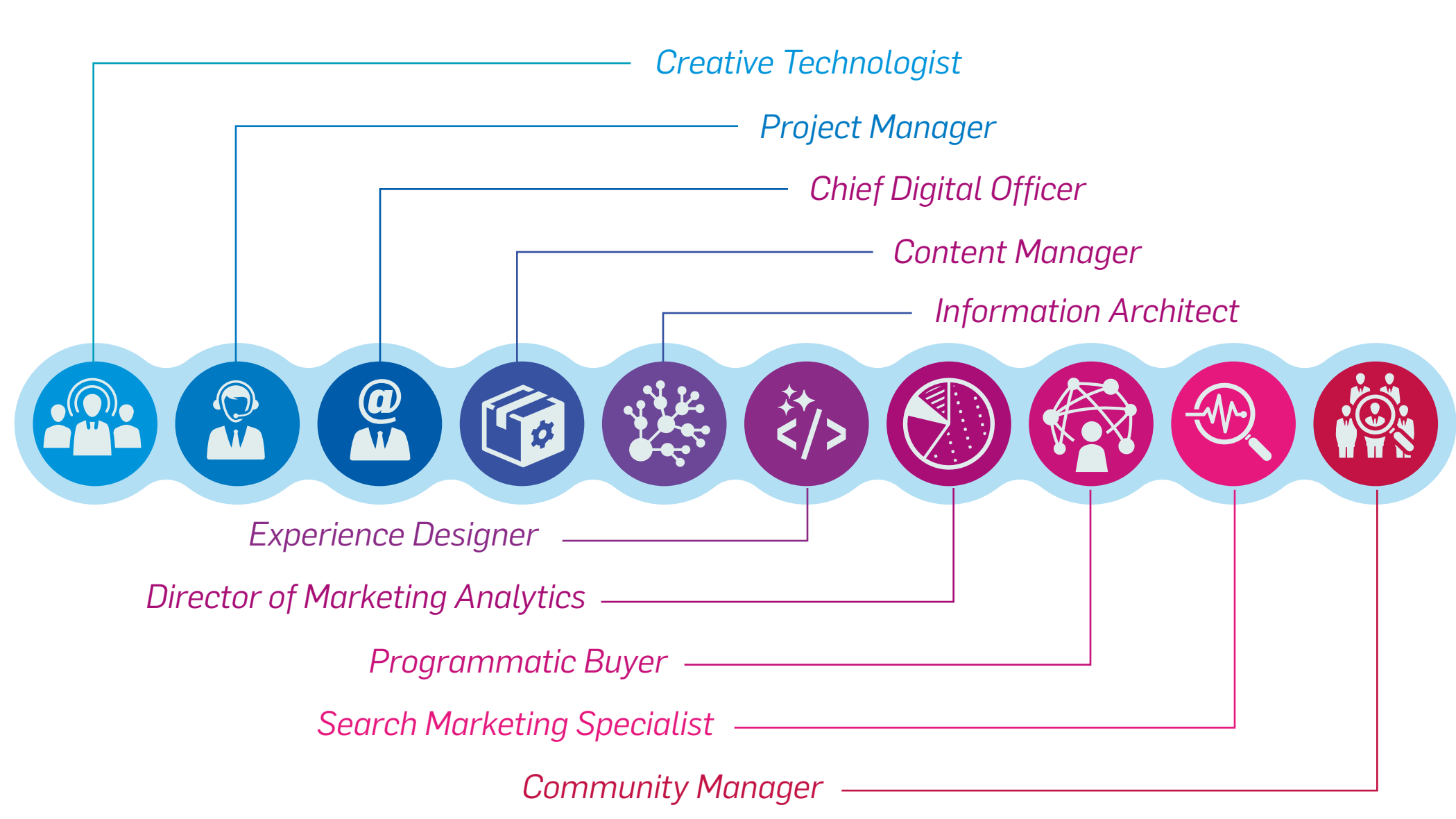
\$48.3 Billion in 2016



Advertising Agency EMPLOYMENT

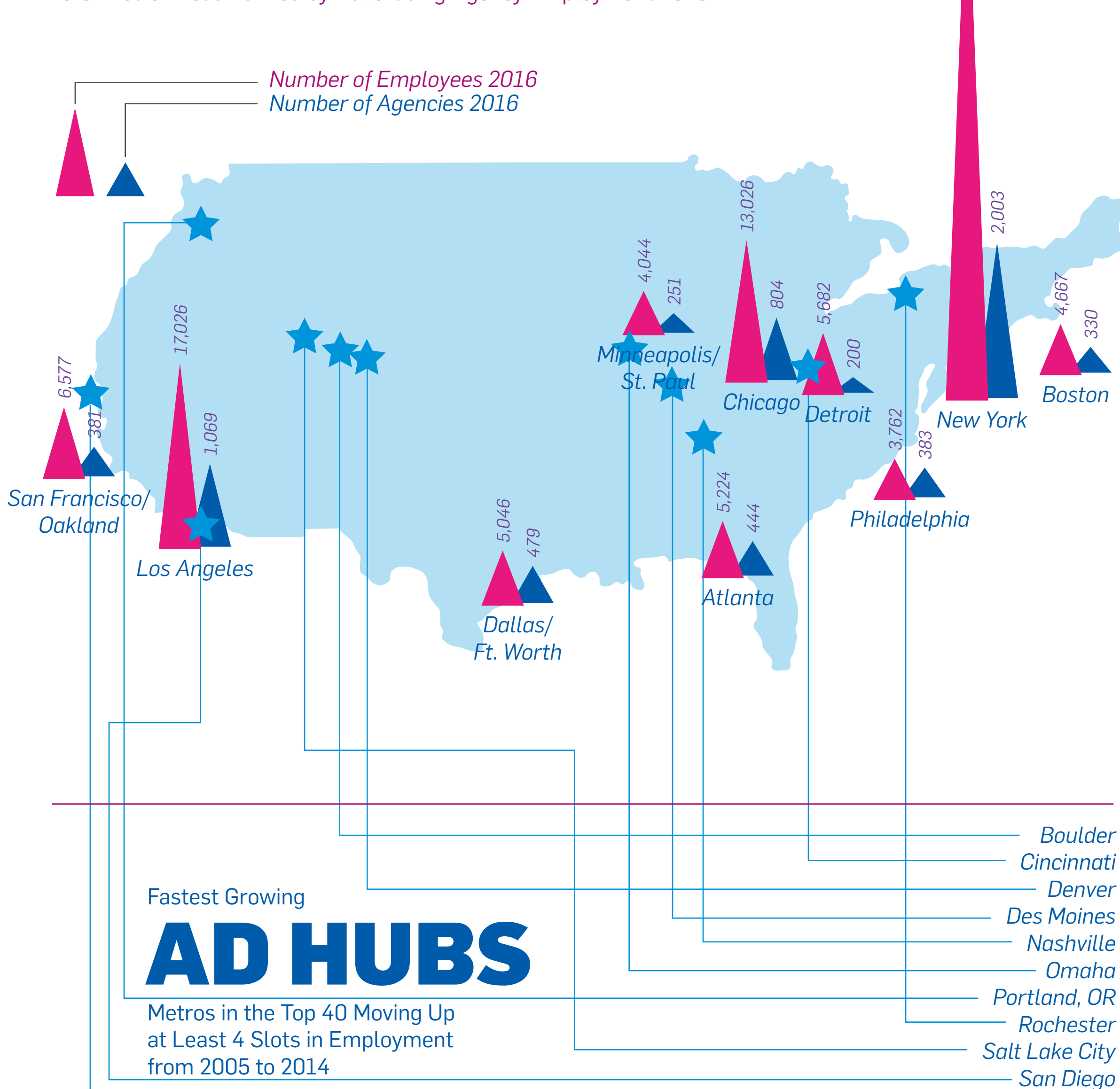


Ten AGENCY JOBS That Didn't Exist Ten Years Ago



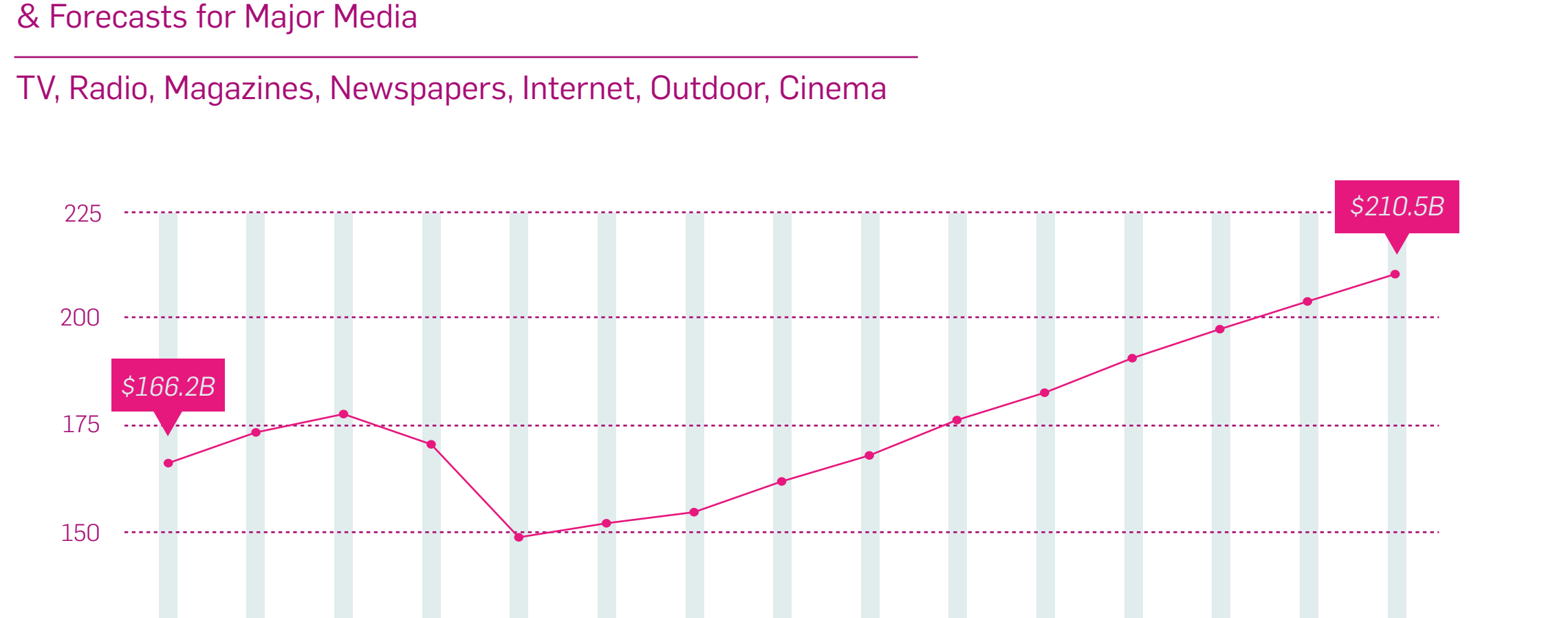
Where the JOBS Are in 2017

U.S. Metro Areas Ranked by Advertising Agency Employment 2016



U.S. ADVERTISING Volume & Forecasts for Major Media

TV, Radio, Magazines, Newspapers, Internet, Outdoor, Cinema



Share of U.S. Advertising EXPENDITURE by Medium 2007 vs. 2016



Sources: County Business Patterns; Advertising Age's annual Agency Report (covering its analysis of 700 agencies each year); Bureau of Labor Statistics, Current Employment Statistics; 4A's; Bureau of Labor Statistics, Quarterly Census of Employment and Wages; ZenithOptimedia, Advertising Expenditure Forecasts, June 2017

