

Advertising Age's



Special Report: Profiles Supplement

June 27, 2005

50th annual 100 LEADING NATIONAL ADVERTISERS

INSIDE

Top 100 ranking

The nation's leading marketers ranked by U.S. advertising expenditures for 2004. Includes data from TNS Media Intelligence and *Ad Age's* proprietary estimates of unmeasured spending. **PAGE 6**

Company profiles

Lead marketing personnel, brands, agencies, agency contacts, as well as advertising spending by media and brand, sales, earnings and more for the country's 100 largest advertisers **PAGE 9**

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Special Report 100 LEADING NATIONAL ADVERTISERS SUPPLEMENT

ABOUT THIS PROFILE EDITION

THE 50TH ANNUAL 100 Leading National Advertisers Report ended in a dead heat between perennial one-two finishers General Motors Corp. and Procter & Gamble Cos. as total advertising of the Top 100 advanced 9.2% to \$98.34 billion in 2004.

GM advertising reached \$3.997 billion, up 6.3%, to P&G's \$3.920 billion, up 17%. P&G, however, is set to sweep into the top spot in 2006 with its acquisition of No. 41 Gillette Co., which closed out at \$836.6 billion, up 30.8% in 2004.

The one-two finish for the two Leaders was the 30th time the two have claimed the top two spots in this report, first published in 1956 (covering 1955 ad data).

Of the \$98.34 billion in total advertising, media spending claimed \$58.48 billion, up 9.2%, and unmeasured forms of advertising claimed the rest. (*See methodology at the end of this article*).

This PDF version of the 100 Leading National Advertisers augments the printed version (*AA, June 27, 2005*) by producing profiles on each Top 100 advertiser. Content of this PDF is as follows:

● **Charts:** Key charts in this report include:

The Top 100: The list covers GM to No. 100 Molson Coors Brewing Co. at \$330.8 million, down 5.1%. Thirty-two marketers on the list have U.S. ad totals above \$1 billion.

Domestic ad spending: This chart is a compilation of media spending from 20 mediums—most of them monitored by TNS Media Intelligence—and unmeasured spending estimates both for the Top 100 (\$39.9 billion) and for all advertisers (\$122.7 billion) in the U.S.

U.S. ad spending by ad category: This chart breaks out 17 measured media by

30 ad categories using TNS' Strategy data, from automotive at \$20.52 billion, up 10.8%, to cigarettes & tobacco at \$318.8 million, down 17.1%.

● **Brands:** There were 569 brands on which the Top 100 spent more than \$10 million in measured media in 2004, according to TNS. *Ad Age* lists these "megabrands" by their media spending in each profile.

P&G supported 45 such megarands in 2004, by far the most among the Top 100. No. 10 Johnson & Johnson was closest to P&G in power brands with 26. Olay at \$267.3 million, up 27.1%, overtook Crest at \$255.1 billion, down 7.1%, as P&G's top brand; Johnson & Johnson's lead brand was Tylenol pain relief remedies at \$212.5 million, up 1.9%. The Verizon Communications megabrand was the hands-down media king at \$1.51 billion, up 27.5%.

● **Sales and earnings:** Primary financial data on each Top 100 company is provided for two consecutive years. Data include worldwide sales and earnings, U.S. or North American sales and operating income if available, and sales by global division.

● **Personnel, brands, agencies:** *Ad Age* lists key marketing executives at the brand or category level of each Top 100 company, and personnel responsible for those accounts at traditional and specialty agencies and media specialty companies.

● **Methodology:** U.S. measured spending was pulled for the 250 largest national advertisers, a group pared to 100 after adding unmeasured ad estimates.

TNS' Strategy product provided measured spending in 17 national media,

Yellow Pages Association contributed spending in Yellow Pages and TNS's Marx Promotion Intelligence provided free-standing insert spending.

Unmeasured spending is an *Ad Age* estimate and includes direct mail, sales promotion, co-op spending, couponing, catalogs, business and farm publications and special events, to name a few. Unmeasured basically is the difference between a company's reported or estimated ad costs and its measured media. The reported ad costs, if global, is weighted by *Ad Age* to reflect a U.S.-only share.

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Special Report

100 LEADING NATIONAL ADVERTISERS SUPPLEMENT

DOMESTIC ADVERTISING SPENDING TOTALS

Ranked by total U.S. ad spending in 2004

MEDIA	ALL U.S. ADVERTISING SPENDING FROM TNS ADVERTISING EXPENDITURES			MEDIUM AS % OF TOTAL		COEN'S U.S. TOTALS*		
	2004	2003	% CHG	2004	2003	2004	2003	% CHG
Magazine	\$21,292	\$19,146	11.2	8.1	7.8	\$12,247	\$11,435	7.1
Sunday magazine	1,497	1,384	8.2	0.6	0.6	NA	NA	NA
Business publication	5,214	5,126	1.7	2.0	2.1	4,072	4,004	1.7
Local magazine	360	325	10.7	0.1	0.1	NA	NA	NA
National newspaper	3,255	3,053	6.6	1.2	1.2	7,629	7,357	3.7
Local newspaper	24,556	23,019	6.7	9.3	9.4	38,985	37,486	4.0
FSIs	1,392	1,317	5.6	0.5	0.5	NA	NA	NA
Network TV	22,522	20,341	10.7	8.5	8.3	16,713	15,030	11.2
Spot TV	17,305	15,499	11.7	6.6	6.3	25,877	23,468	10.3
Syndicated TV	3,931	3,396	15.8	1.5	1.4	3,674	3,434	7.0
Cable TV network	14,249	12,522	13.8	5.4	5.1	16,424	13,954	17.7
Cable local spot	NA	NA	NA	NA	NA	5,103	4,860	5.0
Network radio	1,028	1,001	2.7	0.4	0.4	836	798	4.8
National spot radio	2,617	2,635	-0.7	1.0	1.1	3,540	3,540	0.0
Local radio	7,331	7,250	1.1	2.8	3.0	15,205	14,762	3.0
Outdoor	3,213	2,674	20.1	1.2	1.1	5,770	5,443	6.0
Direct mail	NA	NA	NA	NA	NA	52,191	48,370	7.9
Yellow Pages	NA	NA	NA	NA	NA	14,002	13,896	0.8
Spanish-language media	3,889	3,714	4.7	1.5	1.5	NA	NA	NA
Internet	7,442	6,132	21.4	2.8	2.5	6,853	5,650	21.3
Measured	141,092	128,533	9.8	53.5	52.4	229,121	213,487	7.3
Unmeasured	122,674	116,944	4.9	46.5	47.6	34,645	31,990	8.3
Total U.S.	263,766	245,477	7.5	100.0	100.0	263,766	245,477	7.5

Notes: Dollars are in millions. Media expenditures by medium from TNS Media Intelligence, FSIs from TNS' Marx Promotion Intelligence. The total for ALL U.S. ADVERTISING media expenditures is from Robert J. Coen at Universal McCann.

Special Report

100 LEADING NATIONAL ADVERTISERS SUPPLEMENT

DOMESTIC ADVERTISING SPENDING BY CATEGORY

Ranked by total U.S. ad spending in 2004

RANK '04 '03	CATEGORY	MEASURED MEDIA		U.S. MEASURED MEDIA BREAKOUT FOR 2004							
		2004	% CHG	MAGAZINE	NEWSPAPER	OUTDOOR	TV	CABLE NETS	RADIO	INTERNET	
1	1	Automotive	\$20,518.2	10.8	\$2,529	\$6,670	\$362	\$8,854	\$1,312	\$416	\$375
2	2	Retail	17,285.1	5.3	1,654	7,166	318	5,375	965	699	1,108
3	3	Telecom, Internet	9,059.1	14.0	766	2,209	168	3,254	880	420	1,362
4	4	Medicine & remedies	8,167.7	17.7	2,021	213	18	4,021	1,307	200	388
5	6	Financial services	7,344.0	18.5	1,141	1,642	220	2,283	921	221	915
6	5	Food, beverages & candy	6,840.1	6.3	1,743	51	78	3,418	1,331	140	79
7	7	General services	6,270.0	10.5	901	1,995	449	1,975	303	127	520
8	8	Personal care	5,528.4	7.7	2,023	25	16	2,546	823	42	53
9	9	Movies, DVD & music	5,337.7	5.8	437	1,230	106	2,553	800	97	116
10	11	Direct response	5,245.9	12.2	2,095	411	6	918	1,637	51	128
11	10	Airlines, hotels, car rental	5,141.0	9.7	1,331	1,685	296	842	466	106	416
12	14	Government, politics	4,767.3	31.3	347	432	128	3,172	358	185	145
13	12	Restaurants	4,417.6	6.6	179	176	204	3,123	567	147	22
14	13	Media	3,927.5	7.1	1,600	1,101	224	250	69	269	415
15	16	Apparel	2,588.7	8.5	1,941	39	24	312	186	18	69
16	15	Computers, software	2,466.7	-10.2	1,324	225	23	329	127	34	406
17	18	Insurance	2,331.5	31.0	296	250	85	1,021	347	151	182
18	19	Home furnishings	2,051.4	15.8	1,120	72	6	477	319	21	37
19	21	Real estate	2,023.1	22.1	170	1,368	163	182	48	21	71
20	17	Beer, wine & liquor	1,976.4	9.2	543	73	168	787	316	45	44
21	20	Home supplies & cleaners	1,973.7	14.2	345	9	5	1,112	463	34	6
22	22	Education	1,500.1	20.1	388	268	56	445	94	18	230
23	23	Toys & games	1,132.4	-1.0	205	5	2	348	481	6	86
24	24	Hardware & home building	992.1	11.0	564	56	7	169	162	23	11
25	26	Sporting goods	492.2	9.9	352	19	4	70	38	1	8
26	25	Pet food & pet care	451.6	-2.8	120	2	1	226	75	9	18
27	30	Shipping & freight	356.6	30.2	85	10	6	175	29	27	24
28	28	Gas & oil	353.2	17.0	76	17	34	109	71	43	5
29	29	Office equipment	334.1	19.5	158	23	1	105	31	10	7
30	27	Cigarettes & tobacco	318.8	-17.1	255	10	0	10	1	3	40
		Miscellaneous	3,948.2	5.5	1,946	1,001	35	477	291	61	137
		Total	135,140.5	10.6	28,655	28,451	3,213	48,938	14,818	3,644	7,421

Notes: Dollars in millions. 2003 ranking represents data compiled in 2005. Table includes 17 measured media from TNS Media Intelligence. Yellow Pages is excluded from these totals as are local radio, spot cable and FSIs.

ABOUT THE MEDIA: Consumer magazine includes Sunday magazine, local magazine, and Spanish-language magazine; radio is network and national spot; newspaper includes national newspaper and Spanish-language newspaper.

ABOUT THE CATEGORIES: Categories are aggregated from TNS classifications as follows (not comprehensively): **Automotive** includes dealerships; **Retail** includes discount department & variety stores, department stores, retail, shopping centers & catalog showrooms; **Telecom, Internet services and ISP** includes telephone companies (both wireless, local and long distance), Internet services providers, web designers, communications networks, telephone equipment, and offline internet support; **Medicines & proprietary remedies**: Pharmaceutical houses, medicines & proprietary remedies, fitness,

eye glasses, medical equipment; **Financial services** includes credit cards; **Food, beverages & confectionery**: Beverages, confectionery & snacks, dairy, produce, meat & bakery goods, prepared foods, ingredients, mixes & seasonings; **General Services**: Apparel services, business services, beauty shops, doctors, nurses, chiropractors, dentists, hospitals, clinics & medical centers, legal services, rental services, dating services, spectator sporting events, exterminators, electric & water companies; **Personal care**: Cosmetics & beauty aids, personal hygiene, hair products, toiletries, hygienic goods & skin care; **Movies, recorded video and music** includes DVDs; **Direct response advertising** includes direct response advertising in all classifications; **Airlines, hotel, car rental and travel** includes cruise ship travel; **Apparel**: ready-to-wear, underclothing & hosiery, jewelry, accessories footwear; **Home furnishings, appliances**: household furnishings & accessories, building materials, equipment & fixtures, appliances, electronics; **Home supplies and cleaners**: Household soaps, cleansers & polishes, laundry soaps, foils, wraps, paper products; **Miscellaneous**: Aviation (excluding freight), employment recruitment, military and government, agriculture, lawn and garden, industrial, luggage, cameras, film.

Special Report

100 LEADING NATIONAL ADVERTISERS SUPPLEMENT

NATIONAL ADVERTISERS RANKED 1 TO 50

Ranked by total U.S. ad spending in 2004

RANK 2004	2003	MARKETER	HEADQUARTERS	TOTAL U.S. ADVERTISING SPENDING			U.S. MEASURED MEDIA SPENDING		
				2004	2003	% CHG	2004	2003	% CHG
1	1	General Motors Corp.	Detroit	\$3,997.4	\$3,760.7	6.3	\$2,797.6	\$2,370.6	18.0
2	2	Procter & Gamble Co.	Cincinnati	3,919.7	3,351.2	17.0	3,005.6	2,813.0	6.8
3	3	Time Warner	New York	3,283.1	3,072.8	6.8	1,938.2	1,832.6	5.8
4	4	Pfizer	New York	2,957.3	2,681.9	10.3	1,061.1	1,029.0	3.1
5	5	SBC Communications	San Antonio, Texas	2,686.8	2,599.4	3.4	1,835.9	1,792.2	2.4
6	6	DaimlerChrysler	Auburn Hills, Mich./Stuttgart, Germany	2,462.1	2,385.8	3.2	1,810.6	1,606.8	12.7
7	7	Ford Motor Co.	Dearborn, Mich.	2,458.0	2,207.0	11.4	1,643.3	1,448.9	13.4
8	9	Walt Disney Co.	Burbank, Calif.	2,241.5	2,035.5	10.1	1,390.0	1,404.9	-1.1
9	13	Verizon Communications	New York	2,197.3	1,672.0	31.4	1,528.0	1,207.0	26.6
10	10	Johnson & Johnson	New Brunswick, N.J.	2,175.7	1,961.9	10.9	1,392.5	1,275.5	9.2
11	15	GlaxoSmithKline	Greenford, Middlesex, U.K.	1,828.3	1,562.5	17.0	888.6	790.7	12.4
12	8	Sears Holdings Corp.	Hoffman Estates, Ill.	1,823.0	2,046.5	-10.9	973.7	1,005.4	-3.2
13	14	Toyota Motor Corp.	Toyota City, Japan	1,821.0	1,638.6	11.1	1,097.5	1,015.9	8.0
14	12	General Electric Co.	Fairfield, Conn.	1,819.0	1,723.8	5.5	933.3	869.0	7.4
15	11	Sony Corp.	Tokyo	1,665.3	1,806.6	-7.8	932.6	1,000.7	-6.8
16	19	Nissan Motor Co.	Tokyo	1,539.9	1,309.9	17.6	1,093.3	968.6	12.9
17	16	Altria Group	New York	1,399.4	1,385.7	1.0	1,108.1	1,048.0	5.7
18	17	McDonald's Corp.	Oak Brook, Ill.	1,388.9	1,369.9	1.4	639.2	639.8	-0.1
19	20	L'Oreal	Paris	1,341.1	1,264.4	6.1	768.5	677.0	13.5
20	18	Unilever	London/Rotterdam	1,319.1	1,335.8	-1.3	602.7	620.5	-2.9
21	31	Novartis	Basel, Switzerland	1,284.6	957.0	34.2	582.9	394.8	47.6
22	21	PepsiCo	Purchase, N.Y.	1,262.2	1,210.5	4.3	861.4	892.9	-3.5
23	29	Home Depot	Atlanta	1,255.9	1,024.0	22.6	533.9	570.8	-6.5
24	25	Merck & Co.	Whitehouse Station, N.J.	1,250.3	1,124.1	11.2	350.5	360.0	-2.6
25	26	U.S. Government	Washington	1,228.5	1,122.6	9.4	712.5	654.7	8.8
26	23	Viacom	New York	1,207.3	1,151.1	4.9	724.4	748.2	-3.2
27	24	Honda Motor Co.	Tokyo	1,204.9	1,141.3	5.6	790.8	715.9	10.5
28	28	Sprint Corp.	Westwood, Kan.	1,113.5	1,037.7	7.3	857.4	782.0	9.6
29	27	J.C. Penney Co.	Plano, Texas	1,095.4	1,040.6	5.3	439.6	439.0	0.1
30	30	Estee Lauder Cos.	New York	1,057.0	985.5	7.2	171.1	159.6	7.2
31	32	Nestle	Vevey, Switzerland	1,028.3	954.0	7.8	498.0	522.8	-4.7
32	71	Citigroup	New York	1,000.6	455.1	119.9	610.4	283.3	115.5
33	22	Microsoft Corp.	Redmond, Wash.	986.6	1,180.5	-16.4	483.5	586.6	-17.6
34	35	Best Buy Co.	Eden Prairie, Minn.	950.5	888.8	6.9	389.7	344.8	13.0
35	33	General Mills	Minneapolis	912.5	953.5	-4.3	631.6	668.4	-5.5
36	36	Target Corp.	Minneapolis	904.1	877.1	3.1	526.2	474.7	10.9
37	34	Hewlett-Packard Co.	Palo Alto, Calif.	898.5	944.7	-4.9	548.1	537.3	2.0
38	40	News Corp.	New York	890.5	794.5	12.1	681.1	600.3	13.5
39	44	Schering-Plough Corp.	Madison, N.J.	852.7	715.1	19.2	394.6	320.1	23.3
40	48	Wal-Mart Stores	Bentonville, Ark.	841.4	694.0	21.2	600.2	492.1	22.0
41	51	Gillette Co.	Boston	836.6	639.9	30.8	565.9	352.1	60.7
42	37	Wyeth	Madison, N.J.	828.7	833.2	-0.5	346.0	348.3	-0.7
43	38	Anheuser-Busch Cos.	St. Louis	817.3	820.9	-0.4	506.7	470.7	7.7
44	47	Cendant Corp.	Parsippany, N.J.	803.1	695.1	15.5	288.1	215.3	33.8
45	46	May Department Stores Co.	St. Louis	792.8	708.2	11.9	602.5	612.3	-1.6
46	42	Yum Brands	Louisville, Ky.	779.4	753.4	3.4	663.0	664.6	-0.2
47	41	Bristol-Myers Squibb Co.	New York	772.9	784.8	-1.5	291.4	236.2	23.4
48	49	Dell	Austin, Texas	756.2	669.6	12.9	625.0	495.5	26.1
49	43	Federated Department Stores	Cincinnati	744.1	729.8	2.0	617.6	635.4	-2.8
50	39	Mars Inc.	McLean, Va.	739.8	815.6	-9.3	406.9	432.8	-6.0

Notes: Dollars are in millions. 2003 rankings represent data compiled in 2005. Measured media from TNS Media Intelligence's Strategy, and Yellow Pages Association. Consumer magazine includes Sunday magazine, local magazine, business-to-business magazine and Spanish-language magazines; newspaper includes national newspaper, Spanish-language newspaper and FSI data from TNS' Marx Promotion Intelligence; TV includes network TV, spot TV, syndicated TV, Spanish-language TV and cable TV networks; radio includes network radio and national spot radio.

Special Report

100 LEADING NATIONAL ADVERTISERS SUPPLEMENT

NATIONAL ADVERTISERS RANKED 51 TO 100

Ranked by total U.S. ad spending in 2004

RANK 2004	2003	MARKETER	HEADQUARTERS	TOTAL U.S. ADVERTISING SPENDING			U.S. MEASURED MEDIA SPENDING		
				2004	2003	% CHG	2004	2003	% CHG
51	81	AstraZeneca	London	\$722.9	409.3	76.6	491.3	279.4	75.8
52	54	American Express Co.	New York	717.9	594.6	20.7	405.1	386.5	4.8
53	50	Kroger Co.	Cincinnati	686.1	654.7	4.8	126.7	113.7	11.4
54	57	Sanofi-Aventis	Paris	674.3	575.5	17.2	269.7	217.1	24.2
55	62	IAC/InterActiveCorp	New York	647.5	525.9	23.1	420.9	373.4	12.7
56	56	Kellogg Co.	Battle Creek, Mich.	647.1	576.6	12.2	440.0	388.9	13.1
57	45	IBM Corp.	Armonk, N.Y.	631.9	708.2	-10.8	309.6	351.5	-11.9
58	74	Berkshire Hathaway	Omaha, Neb.	617.0	437.0	41.2	371.8	263.3	41.2
59	61	Safeway	Pleasanton, Calif.	605.7	535.7	13.1	127.5	107.7	18.4
60	67	Deutsche Telekom	Bonn, Germany	603.6	492.5	22.6	445.3	358.6	24.2
61	52	Diageo	London	593.5	628.3	-5.5	163.5	201.0	-18.7
62	146	Eli Lilly & Co.	Indianapolis	586.8	190.8	207.6	240.6	76.3	215.3
63	53	Volkswagen	Wolfsburg, Germany	580.1	610.4	-5.0	417.7	450.5	-7.3
64	78	Nextel Communications	Reston, Va.	575.8	426.0	35.2	339.7	266.4	27.5
65	60	Nike	Beaverton, Ore.	573.9	544.6	5.4	220.1	217.8	1.1
66	64	Lowe's Cos.	North Wilkesboro, N.C.	542.3	506.9	7.0	330.8	304.1	8.8
67	63	Burger King Corp.	Miami	542.1	525.6	3.1	314.4	294.9	6.6
68	72	Coca-Cola Co.	Atlanta	540.5	447.4	20.8	379.4	275.7	37.6
69	98	Hyundai Motor Co.	Seoul	533.6	332.7	60.4	373.5	239.6	55.9
70	69	Kohl's Corp.	Menomonee Falls, Wis.	532.7	470.7	13.2	335.6	293.1	14.5
71	55	Sara Lee Corp.	Chicago	528.9	580.9	-8.9	206.3	207.8	-0.7
72	65	Gap Inc.	San Francisco	525.5	506.1	3.8	404.5	384.6	5.2
73	58	Clorox Co.	Oakland, Calif.	522.1	565.9	-7.7	446.9	510.0	-12.4
74	79	Albertson's	Boise, Idaho	512.3	422.7	21.2	137.9	127.5	8.2
75	88	SC Johnson	Racine, Wis.	510.8	366.4	39.4	425.3	318.3	33.6
76	68	Visa International	San Francisco	505.4	486.6	3.9	353.8	350.6	0.9
77	92	Capital One Financial Corp.	Falls Church, Va.	487.9	350.7	39.1	361.0	192.9	87.2
78	66	Mattel	El Segundo, Calif.	481.7	495.4	-2.8	192.7	192.7	-0.0
79	75	SABMiller	London	471.0	434.2	8.5	306.2	273.2	12.1
80	80	Doctor's Associates	Milford, Conn.	463.0	409.7	13.0	311.3	270.7	15.0
81	76	Bayer	Leverkusen, Germany	459.1	433.6	5.9	258.9	227.9	13.6
82	73	MasterCard International	New York	444.5	446.7	-0.5	328.9	322.2	2.1
83	83	Wendy's International	Dublin, Ohio	435.8	386.8	12.7	361.7	322.3	12.2
84	77	Campbell Soup Co.	Camden, N.J.	425.3	430.2	-1.1	329.5	334.1	-1.4
85	100	Mazda Motor Corp.	Hiroshima, Japan	412.9	318.3	29.7	293.2	232.7	26.0
86	90	BellSouth Corp.	Atlanta	404.9	358.3	13.0	136.2	126.3	7.9
87	87	Limited Brands	Columbus, Ohio	398.5	375.1	6.2	90.0	93.8	-4.0
88	103	Bank of America Corp.	Charlotte, N.C.	398.5	313.3	27.2	294.9	235.1	25.4
89	70	AT&T Corp.	Basking Ridge, N.J.	396.8	469.1	-15.4	277.8	258.9	7.3
90	152	DreamWorks SKG	Glendale, Calif.	380.0	184.8	105.6	318.0	155.5	104.5
91	95	Cadbury Schweppes	London	374.8	340.8	10.0	256.6	236.0	8.7
92	85	Mitsubishi Motors Corp.	Tokyo	374.0	377.8	-1.0	261.8	274.0	-4.4
93	114	Allstate Corp.	Northbrook, Ill.	373.9	280.2	33.4	293.0	231.0	26.8
94	99	United Parcel Service	Greenwich, Conn.	366.4	330.4	10.9	188.9	173.2	9.1
95	59	ConAgra Foods	Omaha, Neb.	363.8	560.6	-35.1	157.1	220.3	-28.7
96	107	Reckitt Benckiser	Windsor, Berkshire, U.K.	363.6	305.5	19.0	312.9	248.0	26.2
97	94	Kia Motors Corp.	Seoul	355.5	348.0	2.2	248.9	250.5	-0.7
98	86	Circuit City Stores	Richmond, Va.	350.0	376.9	-7.1	229.3	245.0	-6.4
99	91	Kimberly-Clark Corp.	Irving, Texas	341.9	351.3	-2.7	267.9	276.3	-3.0
100	93	Molson Coors Brewing Co.	Montreal/Golden, Colo.	330.8	348.5	-5.1	168.7	173.5	-2.8

Notes: Dollars are in millions. 2003 rankings represent data compiled in 2005. Measured media from TNS Media Intelligence's Strategy, and Yellow Pages Association. Consumer magazine includes Sunday magazine, local magazine, business-to-business magazine and Spanish-language magazines; newspaper includes national newspaper, Spanish-language newspaper and FSI data from TNS' Marx Promotion Intelligence; TV includes network TV, spot TV, syndicated TV, Spanish-language TV and cable TV networks; radio includes network radio and national spot radio.

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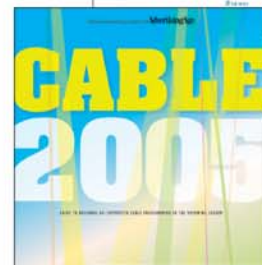
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NATIONAL ADVERTISER PROFILES

74 Albertson's

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$250	\$317	-21.1
Sunday magazine	2,375	2,539	-6.5
B2B magazine	13	NA	NA
Newspaper	37,039	46,791	-20.8
Spanish-language newspaper	858	348	146.6
FSI	1,175	642	83.0
Network TV	NA	47	NA
Spot TV	72,770	57,904	25.7
Syndicated TV	NA	78	NA
Cable TV network	28	18	55.6
National spot radio	18,038	15,969	13.0
Outdoor	4,179	1,833	128.0
Internet	1,171	968	21.0
Measured media	137,896	127,454	8.2
Unmeasured media	374,377	295,252	26.8
Total	512,273	422,706	21.2
By brand	2004	2003	% chg
Albertson's Food Stores	75,908	65,257	16.3
Jewel Food Stores	24,013	21,111	13.7
Osco Drug Stores	14,739	14,898	-1.1
Sav-On Drug Stores	14,018	17,387	-19.4

Sales & earnings (\$ in millions)

Worldwide & U.S.	2004	2003	% chg
Sales	\$39,897	\$35,107	13.6
Earnings	444	556	-20.1

Headquarters

Albertson's/250 Parkcenter Blvd., P.O. Box 20, Boise, Idaho 83726/Phone: (208) 395-6200.

Notes

Albertson's in April 2004 acquired for \$2.5 billion JS USA Holding, owner of 204 Shaws and Star Markets stores in the New England area.

Personnel, brands, agencies

Corporate: Larry Johnston, pres, chmn & CEO; Judy Spires, Dallas/Ft. Worth div pres; Dave Simonson, Southern California region pres; Donna Robbins, Northern California region pres; Pete VanHelden, California div pres; Carl Jablonski, Eastern div pres; Kevin Tripp, drug div pres & exec VP-company drugstore ops; Nicola DeFelice, Shaw's div pres; Larry Whalstrom, Jewel/Osco div pres.

Acento, Los Angeles. Carlos Corboda, acct dir. — Hispanic adv, Albertson's, Jewel, Osco, Sav-On.

Dae Advertising, San Francisco. Angel Wong, sr acct exec. — Asian-American adv, Albertson's.

Duncan & Associates, Los Angeles. Barbie Wentworth, pres & chief operating officer; Steve Moses, acct super-Acme. — Acme, Albertson's, Jewel-Osco, Max Foods, Osco-Drug, Sav-On Drugs, Super Saver.

Shaker Recruitment Adv. & Comms., Oak Park, Ill. Judy Potempa, acct exec. — recruitment adv.

93 Allstate Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$37,022	\$27,787	33.2
Sunday magazine	1,421	1,177	20.7
B2B magazine	725	1,024	-29.2
Local magazine	38	NA	NA
Spanish-language magazine	NA	21	NA
Newspaper	10,309	5,220	97.5
National newspaper	922	NA	NA
Spanish-language newspaper	211	87	142.5
FSI	NA	104	NA
Network TV	116,624	69,090	68.8
Spot TV	6,118	19,224	-68.2
Syndicated TV	6,629	6,297	5.3
Cable TV network	30,217	23,507	28.5
Spanish-language TV	5,419	2,257	140.1
Network radio	3,982	2,108	88.9
National spot radio	30,785	23,942	28.6
Outdoor	10,586	11,874	-10.8
Internet	13,775	12,320	11.8
Yellow Pages	18,264	24,989	-26.9
Measured media	293,047	231,028	26.8
Unmeasured media	80,808	49,156	64.4
Total	373,855	280,184	33.4
By brand	2004	2003	% chg
Allstate	274,538	204,689	34.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$33,936	\$32,149	5.6
Earnings	3,181	2,705	17.6

Headquarters

Allstate Corp./2775 Sanders Rd., Northbrook, Ill. 60062/Phone: (847) 402-5000.

Personnel, brands, agencies

Corporate: Edward M. Liddy, chmn & CEO; Thomas J. Wilson, pres & chief operating officer; Joseph V. Tripodi, sr VP & chief mktg officer; Lisa Cochrane, VP-integrated mktg comms; Nancy Abraham, dir-comm plng & execution.

Braun Burnett Worldwide, Chicago. Nina Abnee, exec VP & acct dir.

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Starcom USA, Chicago. Judy Franks, media dir. — media svcs.
Digitas, Chicago. Barbara Mousigian, sr VP-mktg. — interactive mktg.

Kang & Lee, New York. Cynthia Park, exec VP. — Asian-American adv.

La Agencia de Orci & Asociados, Chicago. Sabrina Grimaldi, sr acct exec. — Hispanic adv.

Carol H. Williams Advertising, Oakland, Calif. Lorraine McGill, acct exec. — African-American adv.

OgilvyOne Worldwide, Chicago. — direct mktg.

17 Altria Group

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$419,311	\$375,417	11.7
Sunday magazine	32,439	17,689	83.4
B2B magazine	5,358	3,781	41.7
Local magazine	446	144	209.7
Spanish-language magazine	537	1,676	-68.0
Newspaper	6,276	9,175	-31.6
National newspaper	435	3,959	-89.0
Spanish-language newspaper	110	42	161.9
FSI	30,559	36,481	-16.2
Network TV	205,810	219,300	-6.2
Spot TV	75,926	84,356	-10.0
Syndicated TV	38,929	37,880	2.8
Cable TV network	191,140	187,443	2.0
Spanish-language TV	32,845	26,115	25.8
Network radio	16,585	10,602	56.4
National spot radio	1,475	4,796	-69.2
Outdoor	1,830	3,576	-48.8
Internet	48,106	25,594	88.0
Measured media	1,108,117	1,048,026	5.7
Unmeasured media	291,309	337,652	-13.7
Total	1,399,426	1,385,678	1.0
By brand	2004	2003	% chg
Nabisco	185,252	161,090	15.0
Kraft	161,368	168,410	-4.2
Philip Morris	135,258	113,315	19.4
Post cereals	121,593	110,544	10.0
Jell-O	49,503	42,016	17.8
Capri Sun Sport Beverages	33,738	33,399	1.0
Oscar Mayer	32,351	25,891	25.0
DiGiorno Frozen Pizza	31,780	30,284	4.9
Maxwell House Coffees	31,604	12,641	150.0
Planters Nuts	29,383	25,862	13.6
Philadelphia Cream Cheese	26,186	25,861	1.3
Lunchables	25,702	23,122	11.2
Crystal Light Beverages	24,517	23,665	3.6
Kool-Aid	20,637	25,857	-20.2
Cool Whip Toppings	19,096	23,128	-17.4
General Foods Intl. Coffees	14,795	14,213	4.1
Altoids Mints	13,784	12,014	14.7
Gevalia Coffee	12,963	10,802	20.0
Balance Energy Bar	11,848	12,661	-6.4
Crema Savers Candy	11,360	10,030	13.3
Miracle Whip Salad Dressing	10,001	5,676	76.2

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$89,610	\$81,320	10.2
Earnings	\$9,416	\$9,204	2.3
North America	2004	2003	% chg
Sales	39,966	38,370	4.2
Division sales	2004	2003	% chg
Tobacco	57,047	50,390	13.2
Food	32,168	30,498	5.5
Financial svcs	395	432	-8.6

Headquarters

Altria Group/120 Park Ave., 25th Fl., New York, N.Y. 10017-5592/Phone: (917) 663-5000.

Personnel, brands, agencies

Corporate: Louis C. Camilleri, chmn & CEO.

Leo Burnett Worldwide, Chicago. Thomas Dudreck, chief operating officer. — corp campaigns.

Kraft Foods: 3 Lakes Dr., Northfield, Ill. 60093-2753/Phone: (847) 646-2000. Roger K. Deromedi, CEO-Kraft Foods; Betsy D. Holden, pres-global mktg & category devel; David S. Johnson, pres-N. Amer. commercial; Hugh H. Roberts, pres-intl commercial; Paula A. Sneed, sr VP-global mktg resources; Don Miceli, VP-global media resources; Barbara Ford, VP-global adv resources.

Footnote Cone & Belding Worldwide, Chicago & New York. Joan Black, exec VP & ww grp acct dir-Chicago; John Campbell, grp mgmt dir-New York. — Chicago: A.1., Back to Nature, Boca Foods, Kraft Easy Mac, Kraft Pizza Company (California Pizza Kitchen, DiGiorno, Tombstone), It's Pasta Anytime, Kraft Cooking, Kraft Macaroni & Cheese, Kraft Natural Cheeses, Kraft Salad Dressings (Good Seasons, Pourables), Velveeta, Ums Cheese Snacks, Jack's pizza, Seven Seas, Shake 'n Bake, Stove Top Stuffing, Stove Top Oven Classics. New York: Chips Ahoy!, Cool Whip, Corn Nuts, CremeSavers, Fig Newtons, Fun Fruits, General Foods International Coffees, Gevalia Kaffe, Gummi Savers, Handi-Snacks, Honeymaid Grahams, Jell-O, Jet Puffed Marshmallows, LifeSavers, Nutter Butter, Oreo, Planters Nuts, SnackWell's, Starbucks Grocery Partnership, Teddy Grahams, Terry's Chocolates, Trolli.

JWT, Chicago. Ros King, global bus dir; Julia Kenyon, mktg dir-Kraft Foods USA. — Breakstone's, Cheez Whiz, Grey Poupon, Knudsen dairy prods, Kraft Cheese Nips, Kraft Grated Parmesan, Kraft Mayo, Kraft Singles, Kraft 2% cheese, Mini Ritz, Miracle Whip, Nabisco, Oscar Mayer, Oscar Mayer bacon, Oscar Mayer hot dogs, Oscar Mayer Lunchables, Oscar Mayer meats, Philadelphia cream cheese, Ritz & Ritz Bits crackers, Ritz Chips, Ritz Dinosaurs, Ritz International, Ritz Sticks, Ritz Top 'ems, Triscuit, Wheat Thins.

Leo Burnett Worldwide, Chicago. John Gatti, exec VP & acct dir; Sara O'Mara, VP & acct dir. — Altoids.

Ogilvy & Mather Worldwide, New York. Bill Brooks, acct dir. — Balance Bar, Capri Sun, Country Time, Crystal Light, Kool-Aid, Maxwell House, Post cereals, Tang, VeryFine, Yuban.

Park South, New York. Paul Grundlach, acct exec. — Baker's chocolate, Breyer's yogurt, Sure-Jell.

MediaVest, New York. Bill Tucker, mg dir. — media svcs.

Bravo Group, New York. Nilda Velez, VP & grp acct dir. —

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Hispanic adv, Capri Sun, Chips Ahoy, Kraft Mac N' Cheese, Kraft Singles, Kool-Aid, Oreo, Oscar Mayer, Post, Pourables, Ritz.

Publicis Dialog, New York. Amie Wilkening, sr VP & acct dir-retail connections. — retail mktg.

UniWorld Group, New York. Fiona Roache, dir-client svcs; Ronny Mills, grp acct dir. — African-American adv, urban mktg, Deluxe Mac & Cheese, Kool-Aid, Post.

Philip Morris USA: 6601 Broad St., Richmond, Va. 23230/Phone: (804) 274-2000. Michael E. Szymanczyk, chmn & CEO; Jack Nelson, pres-ops & tech; Nancy Brennan-Lund, sr VP-mktg; Howard Willard, sr VP-youth smoking & corp responsibility; David Beran, exec VP-strategy, comms & cons contact.

Leo Burnett Worldwide, Chicago. Thomas Dudreck, chief operating officer. — Basic, Benson & Hedges, Chesterfield, Cambridge, Marlboro, Merit, Parliament, Virginia Slims.

Starcom USA, Chicago. Mary Ann Foxley, exec VP & dir-media. — media svcs.

Y&R, New York. Jane Brite, exec VP & mg ptrn. — corp affairs.

52 American Express Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$96,532	\$93,147	3.6
Sunday magazine	2,860	991	188.6
B2B magazine	6,243	7,871	-20.7
Local magazine	320	442	-27.6
Spanish-language magazine	171	154	11.0
Newspaper	21,791	23,601	-7.7
National newspaper	25,864	34,766	-25.6
Spanish-language newspaper	19	17	11.8
FSI	92	12	666.7
Network TV	101,125	68,988	46.6
Spot TV	18,002	33,049	-45.5
Syndicated TV	2,678	4,518	-40.7
Cable TV network	79,702	71,484	11.5
Network radio	4,599	6,422	-28.4
National spot radio	5,651	12,037	-53.1
Outdoor	7,376	8,581	-14.0
Internet	32,059	20,401	57.1
Measured media	405,084	386,481	4.8
Unmeasured media	312,857	208,086	50.3
Total	717,941	594,567	20.8
By brand	2004	2003	% chg
American Express	395,608	375,350	5.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$29,115	\$25,836	12.7
Earnings	3,445	2,987	15.3
U.S.	2004	2003	% chg
Sales	22,918	20,859	9.9
Pre-tax income	3,980	3,385	17.6
Division sales	2004	2003	% chg
Travel related svcs	21,578	19,189	12.4
Am Ex Financial Advisors	7,035	6,142	14.5
American Express Bank	825	801	3.0
Corporate & other	-323	-296	NA

Headquarters

American Express Co./World Financial Center, 200 Vesey St., New York, N.Y. 10285/Phone: (212) 640-2000.

Notes

American Express will spin off American Express Financial Advisors later in 2005. American Express will initially take a 18-20% interest in the new publicly-held company, building that to 28-30%. AEFA in May 2005 hired agency Saatchi & Saatchi, New York, to handle its initial branding efforts to break in the fall. The new unit is being called Ameriprise Financial. RiverSource is the name for its insurance, asset management and annuities business.

Personnel, brands, agencies

Corporate: Kenneth I. Chenault, chmn & CEO.

Digitas, New York. Joanne Zaiac, pres-Digitas New York. — dir mktg, interactive mktg.

American Express Financial Advisors: 200 AXP Financial Center, Minneapolis, Minn. 55474/Phone: (612) 671-3131. James M. Cracchiolo, chmn & CEO; Kim Sharan, sr VP & chief mktg officer; Giunero Floro, VP-adv, branding & media.

Ogilvy & Mather Worldwide, New York. John Seifert, mg ptrn; Simon Pearce, exec grp dir.

Saatchi & Saatchi, New York. Bob Eck, exec VP & grp acct dir. — Ameriprise Financial.

MindShare Worldwide, New York. Kristen Engard, sr ptrn & strategic plng dir. — media svcs.

American Express Publishing Corp.: 1120 Ave. of the Americas, New York, N.Y. 10036/Phone: (212) 382-5600. Ed Kelly, pres & CEO; Mark V. Stanich, sr VP & chief mktg officer.

No agency.

American Express Travel Related Services Co.: World Financial Center, 200 Vesey St., New York, N.Y. 10285/Phone: (212) 640-2000. John D. Hayes, chief mktg officer; Nancy Smith, VP-global media & sponsorship mktg; Diego Scotti, VP-global adv; Sid Rothstein, VP-agency mgmt; Barbara Fraser, sr VP-global mktg; Christine Brandt-Jones, VP-global marketplace insights.

Ogilvy & Mather Worldwide, New York. John Seifert, mg ptrn. — American Express cards & svcs.

MindShare Worldwide, New York. Rob Reifeneiser, sr ptrn & strategic plng dir. — media svcs.

43 Anheuser-Busch Cos.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$29,933	\$31,053	-3.6
Sunday magazine	508	502	1.2
B2B magazine	1,622	2,249	-27.9
Local magazine	131	79	65.8
Spanish-language magazine	613	343	78.7
Newspaper	8,636	9,245	-6.6
National newspaper	3,420	2,845	20.2
Spanish-language newspaper	462	358	29.1
FSI	1	2	-50.0

Special Report

100 LEADING NATIONAL ADVERTISERS SUPPLEMENT

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Network TV	292,816	241,792	21.1
Spot TV	46,481	57,657	-19.4
Syndicated TV	1,263	4,698	-73.1
Cable TV network	47,511	42,791	11.0
Spanish-language TV	10,052	13,962	-28.0
Network radio	250	NA	NA
National spot radio	426	495	-13.9
Outdoor	58,811	59,131	-0.5
Internet	3,785	3,497	8.2
Measured media	506,721	470,699	7.7
Unmeasured media	310,569	350,156	-11.3
Total	817,290	820,855	-4
By brand	2004	2003	% chg
Budweiser & Bud Light	305,103	267,332	14.1
Michelob	87,030	86,877	0.2
Anheuser-Busch Cos.	49,063	39,736	23.5
Busch Beer & Gardens	21,979	24,408	-10.0
Bacardi Silver Malt Liquor	17,461	24,623	-29.1
Sea World	16,943	18,308	-7.5

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$14,934	\$14,147	5.6
Earnings	2,240	2,076	7.9
U.S.	2004	2003	% chg
Sales	13,919	13,350	4.3
Division sales	2004	2003	% chg
Domestic beer	13,372	12,997	2.9
Packaging	2,277	2,094	8.7
International beer	1,015	797	27.4
Entertainment	989	924	7.0
Other	75	74	1.4

Headquarters

Anheuser-Busch Cos./1 Busch Place, St. Louis, Mo. 63118/Phone: (314) 577-2000.

Notes

Anheuser-Busch in June 2004 named Michael Owens to the new post of vice president of sales and marketing, reporting to Bob Lachky, vice president of brand management and director of global brand creative, on everything except creative strategy and development.

Personnel, brands, agencies

Corporate: August A. Busch III, chmn; Patrick Stokes, pres & CEO; August A. Busch IV, pres-Anheuser-Busch; Bob Lachky, VP-brand mgmt & dir-global brand creative; Mike Owens, VP-sls & mktg; Tony Ponturo, VP-global media & sports mktg; Keith Levy, VP-retail mktg; Peter McLoughlin, VP-corp media; Jim Schumacker, VP-creative devel & adv svcs; Tim Schoen, VP-sports & entertainment mktg; John Marota, grp VP- retail creative svcs; Denny Galati, dir-creative devel; Tim Murphy, dir-creative devel; Dave Winking, dir-global adv production; Steve Uline, VP-geographic mktg; Pat McGauley, sr dir-innovation & high end brands; Dan Hoffmann, dir-retail sls promo; Andy Goeler, sr dir-Budweiser mktg; Dan McHugh, sr dir-Bud Light mktg; Rick

Leininger, dir-Michelob family & specialties; Danny Scott, dir-tactical brands; Don Meyer, dir-new prods.

DDB Worldwide Communications, Chicago & New York. Steve Jackson, ww acct dir. — Bud Light, Budweiser, Bud Select, Busch family, Michelob Amber Bock, Michelob ULTRA, consumer awareness.

Downtown Partners, Toronto. Jeff McCrory, dir-client svcs; Tim Binkley, acct dir. — Budweiser, Bud Light, Doc Otis.

Goodby, Silverstein & Partners, San Francisco. Tanin Blumberg, acct mgr. — Budweiser, Bud Light.

Hill, Holliday, Connors, Cosmopolos, Boston. Mike Sheehan, CEO; Tim Foley, exec VP & grp creative dir; Bryan Sweeney, sr VP & dir-bdcast; Tom Jump, exec VP & grp acct dir; Justin Holloway, exec VP & dir-board plng. — Budweiser, Anheuser World Lager.

Modernista, Boston. Clift Jones, pres; Lance Jensen, co-founder; Gary Koepke, co-founder. — Budweiser.

Cannonball, St. Louis. — Budweiser, Bud Light, Michelob ULTRA, Baccardi Silver.

Brado Cuneo, St. Louis. Bob Cuneo, ptnr; Steve Nollau, ptnr. — special projects.

Del Rivero Messianu DDB, Miami. Angela Battistini, VP-acct svcs; Sylvia Curran, acct exec; Enrique Faillace, creative dir; Luis Messianu, chief creative officer. — Hispanic adv, Bud Light, Budweiser.

Dieste, Harmel & Partners, Dallas. David Ravelo, exec dir. — Hispanic adv, Bud Light.

DNA Studio, Beverly Hills, Calif. Josh Moshay, CEO. — interactive mktg.

LatinWorks Marketing, Austin, Texas. Manny Flores, CEO. — Hispanic adv, Budweiser, Bud Light.

Momentum Worldwide, St. Louis. Deborah Nobis, grp acct dir. — sls promo, cons awareness, Budweiser, Bud Light, Bacardi Silver, Michelob family.

Waylon Ad, St. Louis. Jim Palumbo, pres. — Budweiser, cons awareness.

Busch Entertainment: 231 S. Bemiston, Ste. 600, Clayton, Mo. 63105/Phone: (314) 577-2000. Keith M. Kasen, chmn; Robin D. Carson, corp VP-mktg; Linda Smith, VP-brand mgmt; Dan Dipiazza, VP-cons mktg; Shannon Rodriguez, dir-mktg; Marcy Miles, dir-brand mgmt.

DDB Worldwide Communications, Chicago. Ramona Biliunas, VP & mgmt rep. — Sea World Orlando, Sea World San Antonio, Sea World San Diego, Sesame Place, Water Country USA.

Momentum Worldwide, St. Louis. Deborah Nobis, grp acct dir. — Busch Gardens Tampa, Busch Gardens Williamsburg.

Waylon Ad, St. Louis. Jim Palumbo, pres. — Discovery Cove Orlando.

51 AstraZeneca

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$98,925	\$90,033	9.9
Sunday magazine	30,958	18,700	65.6
B2B magazine	2,525	903	179.6
Local magazine	NA	90	NA

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Spanish-language magazine	NA	18	NA
Newspaper	28,770	335	NA
National newspaper	5,446	304	NA
Spanish-language newspaper	129	NA	NA
FSI	NA	1,192	NA
Network TV	182,513	110,709	64.9
Spot TV	39,916	1,381	NA
Syndicated TV	12,581	12,586	0.0
Cable TV network	45,592	17,245	164.4
Network radio	5	8,488	-99.9
National spot radio	2,352	1,397	68.4
Outdoor	24	107	-77.6
Internet	41,520	15,884	161.4
Measured media	491,256	279,372	75.8
Unmeasured media	231,623	129,969	78.2
Total	722,879	409,341	76.6
By brand	2004	2003	% chg
Nexium	242,048	231,223	4.7
Crestor	216,210	137	158063.6
Arimidex	11,548	23,112	-50.0
AstraZeneca	10,346	3,402	204.2

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	 \$21,426	\$18,849	13.7
Earnings	 4,770	4,111	16.0
Americas	2004	2003	% chg
Sales	 9,631	8,747	10.1
Division sales	2004	2003	% chg
Pharmaceuticals	 21,426	18,849	13.7

Headquarters

AstraZeneca/15 Stanhope Gate, London, United Kingdom W1K 1LN/Phone: 207-304-5000.

AstraZeneca/1800 Concord Pike, P.O. Box 15437, Wilmington, Del. 19850-5437/Phone: (302)886-3000.

Personnel, brands, agencies

Corporate: Tom McKillop, chief exec; David Brennan, pres & CEO-AstraZeneca US; Tony Zook, sr VP-commercial ops.

CommonHealth, Wayne & Parsippany, N.J. Matt Giegerich, pres & CEO; Guy Dess, pres-Adient (a CommonHealth co.); Stu Klein, pres-Quantum (a CommonHealth co.); Nancy Barlow, pres-Xchange (a CommonHealth co.) — Atacand/Atacand HCT, Toprol-XL, Crestor.

Medicus Group International, New York. Scott Shevrin, sr VP & grp acct dir; Craig Narveson, sr VP & grp acct dir. — Arimidex, Faslodex, Pulmicort Respules/Turbuhaler, Rhinocort, Symbicort.

Saatchi & Saatchi Healthcare, New York. Sam Welch, exec VP & mg dir. — Entocort, Merrem, Nexium, Seoquel.

Zenith Media, New York. Rich Schiekofe, sr VP & dir comms svcs; Earl Black, assoc dir-comms svcs. — media svcs, Arimidex, Casodex/Zolodex, Crestor, Nexium, Pulmicort Respules, Seroquel Toprol XL.

Bromley Communications, New York & San Antonio. Jane Finney, acct dir. — Hispanic adv, Nexium, Pulmicort Respules.

UniWorld Group, Wilmington, Del. Fiona Roache, dir-client svcs; Ronny Mills, grp acct dir. — African-American adv, AstraZeneca, Pulmicort Respules.

89 AT&T Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	 \$20,273	\$13,050	55.3
Sunday magazine	 1,059	3,220	-67.1
B2B magazine	 5,878	1,053	458.2
Local magazine	 NA	7	NA
Spanish-language magazine	 33	90	-63.3
Newspaper	 15,009	15,416	-2.6
National newspaper	 6,949	2,941	136.3
Spanish-language newspaper	 209	106	97.2
Network TV	 73,373	46,228	58.7
Spot TV	 32,187	51,538	-37.5
Syndicated TV	 1,812	9,994	-81.9
Cable TV network	 63,580	55,079	15.4
Spanish-language TV	 32,569	39,247	-17.0
Network radio	 1,839	5,730	-67.9
National spot radio	 4,336	8,290	-47.7
Outdoor	 3,178	3,433	-7.4
Internet	 15,504	3,479	345.6
Measured media	 277,788	258,901	7.3
Unmeasured media	 119,052	210,206	-43.4
Total	 396,840	469,107	-15.4
By brand	2004	2003	% chg
AT&T	 250,546	232,863	7.6
10-10-345 Long Distance	 26,052	24,643	5.7

Sales & earnings (\$ in millions)

Worldwide & U.S.	2004	2003	% chg
Sales	 \$30,537	\$34,529	-11.6
Earnings	 -6,469	1,863	NA

Headquarters

AT&T Corp./1 AT&T Way, Bedminster, N.J. 07921-0752/Phone: (908) 221-2000.

Notes

In July 2004, AT&T announced it would shift away from consumer services and, with that, no longer advertise to consumers. In January 2005, the company announced its sale to SBC, expected to close in the first half of 2006.

Personnel, brands, agencies

Corporate: David Dorman, chmn & CEO; Kathleen Flaherty, chief mktg officer.

Digitas, Boston. Robert Hurley, exec VP.

DVC, Morristown, N.J. Mike Zeman, CEO; Jill Draper, exec VP.

Y&R, New York. June Blockin, vice chmn.

Mediaedge:cia, New York. Charles Courtier, exec chmn-ww; Lee Doyle, mg ptrn & client svcs dir; Cathy Goodin, mg ptrn & acct dir. — media svcs.

Kang & Lee, New York. Cynthia Park, exec VP. — Asian-American adv.

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UniWorld Group, New York. Fiona Roache, dir-client svcs; Herman Morales, grp acct dir. — African-American adv, Hispanic adv.

88 Bank of America Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$12,726	\$5,848	117.6
Sunday magazine	4,178	NA	NA
B2B magazine	3,352	3,542	-5.4
Local magazine	411	370	11.1
Spanish-language magazine	147	660	-77.7
Newspaper	43,199	52,819	-18.2
National newspaper	11,208	9,898	13.2
Spanish-language newspaper	1,782	1,083	64.5
Network TV	46,234	60,508	-23.6
Spot TV	59,434	30,320	96.0
Syndicated TV	266	177	50.3
Cable TV network	38,464	28,557	34.7
Spanish-language TV	2,214	58	NA
Network radio	689	NA	NA
National spot radio	28,716	16,533	73.7
Outdoor	17,159	11,842	44.9
Internet	24,696	12,894	91.5
Measured media	294,875	235,109	25.4
Unmeasured media	103,605	78,223	32.4
Total	398,480	313,332	27.2
By brand	2004	2003	% chg
Bank of America	251,560	174,930	43.8
FleetBank	32,402	50,887	-36.3

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$49,610	\$38,557	28.7
Earnings	14,143	10,810	30.8
North America	2004	2003	% chg
Sales	46,156	36,541	26.3
Net income	13,384	10,843	23.4
Division sales	2004	2003	% chg
Global Cons. & Sm. Bus. Banking	26,857	NA	NA
Global Cap. Mkts & Inv. Banking	9,049	NA	NA
Global Bus. & Financial Svcs	6,722	NA	NA
Global Wealth & Inv. Mgmt.	5,918	NA	NA
All Other	1,064	NA	NA

Headquarters

Bank of America Corp./100 N. Tryon St., Charlotte, N.C. 28255/Phone: 800-432-1000.

Notes

Bank of America uses up to 16 agencies within the Interpublic Group of Cos. based on specific needs and projects.

Personnel, brands, agencies

Corporate: Kenneth D. Lewis, chmn & CEO; Cathy Bessant, global mktg exec.

Initiative Media Worldwide, New York. Larry Orell, exec VP & gm. — media svcs.

81 Bayer

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$18,208	\$15,960	14.1
Sunday magazine	1,102	2,259	-51.2
B2B magazine	883	1,315	-32.9
Local magazine	2	NA	NA
Spanish-language magazine	5	NA	NA
Newspaper	872	435	100.5
National newspaper	791	751	5.3
Spanish-language newspaper	NA	1	NA
FSI	6,396	6,587	-2.9
Network TV	117,266	93,899	24.9
Spot TV	15,739	13,782	14.2
Syndicated TV	35,031	34,361	1.9
Cable TV network	49,871	42,486	17.4
Spanish-language TV	3,493	3,297	5.9
Network radio	4,143	8,489	-51.2
National spot radio	3,251	3,170	2.6
Outdoor	413	1,076	-61.6
Internet	1,428	41	NA
Measured media	258,894	227,909	13.6
Unmeasured media	200,192	205,687	-2.7
Total	459,086	433,596	5.9
By brand	2004	2003	% chg
Bayer	60,907	53,103	14.7
Aleve	59,095	60,015	-1.5
One-A-Day Vitamins	47,657	30,263	57.5
K9 Advantix	20,990	19,827	5.9
Alka-Seltzer	20,778	32,331	-35.7
Ascensia Diabetes Care Sys.	15,674	595	2536.0

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$37,167	\$32,604	14.0
Earnings	753	-1,553	NA
North America	2004	2003	% chg
Sales	10,338	7,567	36.6
Other operating income	57	68	-16.2
Division sales	2004	2003	% chg
MaterialScience	10,737	8,506	26.2
HealthCare	10,598	10,125	4.7
CropScience	7,426	6,579	12.9

Headquarters

Bayerwerk, 5368 Leverkusen, Germany /Phone: 49-214-301.

Bayer Corp., 100 Bayer Rd., Bldg. 4, Pittsburgh, Pa. 15205-9741/Phone: (412) 777-2000.

Personnel, brands, agencies

Corporate: Manfred Schneider, chmn-Bayer A.G.; Attila Molnar, pres & CEO-Bayer Corp.; J. Kolpon, VP-mktg.

BBDO Worldwide, Chicago. Anne Dooley, exec VP & client svc dir.

DDB Worldwide Communications, New York. Ellen Fields, grp acct dir. — Science Literacy Program.

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Initiative Media North America, New York. Larry Orell, exec VP & gm. — media buying.

OMD Worldwide, New York, Chicago, Atlanta. Eve Leshaw, acct dir-New York; Dale Travis, acct dir-Atlanta; Deb Nevin, acct dir-Chicago. — media plng.

Animal Health Division: 12707 Shawnee Mission Pkwy., Shawnee, Kan. 66216/Phone: 913-268-2000. Joerg Ohle, sr VP & gm; Jeff Gaidos, VP-mktg.

Bernstein-Rein Advertising, Kansas City, Mo. Dave Lubeck, sr VP & dir-client svcs. — K9 Advantix.

Initiative Media Worldwide, New York. Larry Orell, exec VP & gm. — media buying, Advantage Flea Control.

Bayer CropScience: P.O. Box 12014, Research Triangle Park, N.C. 27709/Phone: (919) 549-2000. Bill Buckner, head-U.S. bus opers; John Gray, VP-mktg; Tim Zurliene, mgr-mktg svcs.

Rhea & Kaiser Marketing Communications, Naperville, Ill. Ben Potter, acct exec.

Ad Farm, Kansas City, Mo. Kim McConnell, pres & CEO.

Bayer HealthCare, Diabetes Care: 1885 Miles Ave., Elkhart, Ind. 46515/Phone: (574) 264-8893. Joe Martin, div head; Nancy Dean, VP-global mktg-Ascensia blood glucose monitors; Joseph Malta, head, N. Amer. mktg-Ascensia blood glucose monitors.

TBWA Worldwide, New York. Victor Imbimbo, exec grp dir; Nicole Minore, grp acct dir. — Ascensia.

Lyons Lavey Nickel Swift, New York. Melissa Gelade, sr acct exec.

Initiative Media Worldwide, New York. Larry Orell, exec VP & gm. — media buying, Ascensia Breeze, HIV, hepatitis, laboratories.

OMD Worldwide, New York, Atlanta, Chicago. Eve Leshaw, acct dir-New York; Dale Travis, acct dir-Atlanta; Deb Nevin, acct dir-Chicago. — media plng.

Biological Products: 800 Dwight Way, Berkeley, Calif. 94710/Phone: (510) 705-7891. Joseph Akers, pres; Mike Mathews, VP-global mktg; Terry Tenbrunsel, VP-sls, USA.

No agency.

Consumer Care Division: 36 Columbia Rd., P.O. Box 1910, Morristown, N.J. 07962-1910/Phone: (973) 254-5000. Gary S. Balkema, pres-cons care bus grp; Timothy G. Hayes, sr VP & region head-N. Amer.

BBDO Chicago, Chicago. Anne Dooley, exec VP & dir-client svcs. — Bayer Aspirin, Aleve, Aleve Cold & Sinus, One-A-Day, Flintstones Vitamins, Bugs Bunny Vitamins, Alka-Seltzer antacid, Alka-Seltzer Plus cold medicine, Rid lice treatment, Neo-Synephrine, Midol, Phillips' Milk of Magnesia.

Medicus Group International, New York. Scott Shevrin, sr VP & grp acct dir. — Pravachol OTC.

Initiative Media North America, New York. Larry Orell, exec VP & gm. — media buying, Aleve, Aleve Cold and Sinus, Alka Seltzer, Alka Seltzer Plus, One-A-Day Vitamins, Flintstone Vitamins, Bayer Aspirin, Midol, Philips Milk of Magnesia.

OMD Worldwide, New York & Chicago, N.Y. Eve Leshaw, acct dir-New York; Deb Nevin, acct dir-Chicago. — media plng.

Pharmaceutical Division: 400 Morgan Lane, West Haven, Conn. 06516/Phone: (203) 812-2000. Wolfgang Plischke, pres & gm; Stefan Oelrich, VP-mktg; John Magee, VP-sls; Joyce Buford, mgr-div comms.

Dudnyk Healthcare West, San Francisco, Calif. Robin Mueller, acct mgr. — Coagulation-Koate, Kogenate.

Euro RSCG Life, New York. John Timmins, mg dir- Oncologix. — Viadur.

Lyons Lavey Nickel Swift, New York. Joe Noel, sr VP & grp acct super. — Avelox, Bayer Biologicals, Bayer Oncology, Cipro IV, Cipro Tablets, Trasylol.

Initiative Media Worldwide, New York. Larry Orell, exec VP & gm. — media buying, Levitra.

86 BellSouth Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$2,178	\$3,498	-37.7
Sunday magazine	.663	157	322.3
B2B magazine	.694	2,039	-66.0
Local magazine	.20	62	-67.7
Newspaper	22,788	23,356	-2.4
National newspaper	.981	1,532	-36.0
Spanish-language newspaper	.332	466	-28.8
Network TV	.6,164	6,690	-7.9
Spot TV	.69,157	58,732	17.8
Syndicated TV	.51	NA	NA
Cable TV network	.896	43	NA
Spanish-language TV	.64	NA	NA
National spot radio	.20,111	21,591	-6.9
Outdoor	.2,135	1,260	69.4
Internet	.3,325	703	373.0
Yellow Pages	.6,657	6,158	8.1
Measured media	.136,216	126,287	7.9
Unmeasured media	.268,656	231,977	15.8
Total	.404,872	358,264	13.0
By brand	2004	2003	% chg
BellSouth	128,560	118,032	8.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$20,300	\$22,635	-10.3
Earnings	4,758	3,904	21.9
U.S.	2004	2003	% chg
Sales	20,300	20,341	-0.2
Net income	3,439	3,690	-6.8
Division sales	2004	2003	% chg
Communications Group	18,452	18,448	0.0
Domestic Wireless	6,989	5,689	22.9
Advertising & publishing	2,019	2,050	-1.5

Headquarters

BellSouth Corp./1155 Peachtree St., N.E., Atlanta, Ga. 30309/Phone: (404) 249-2000.

Personnel, brands, agencies

Corporate: F. Duane Ackerman, chmn & CEO; William Pate, VP-adv & pr; F. Alan Blount, asst VP-corp adv; Marci Raible, sr dir-media.

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BellSouth Advertising & Publishing Co. (BAPCO): 2247 North Lake Pkwy, Tucker, Ga. 30084/Phone: (678) 406-0885. Isaiah Harris, pres; Cathy Linton, dir-adv.

WestWayne, Atlanta. Will Thomason, exec VP & grp acct dir.

Initiative Media Worldwide, Atlanta. Rich Simms, exec VP & gm; Maggie McIntyre, sr VP & grp acct dir. — media svcs.

BreatheInteractive, Atlanta. Melissa Kimble, mg super. — interactive mktg.

Machado Garcia-Serra Publicidad, Atlanta. Gabriela Alcantara Diaz, exec VP. — Hispanic adv.

BellSouth Communications: 1025 Lennox Park Blvd., Rm C764, Atlanta, Ga. 30319. Marci Raible, sr dir-small bus; Kerry Trivers, dir-cons adv; Cathy Linton, dir-large bus adv; Dave Cygan, dir-DSL adv.

Grey Worldwide, New York. Chris Rich, exec VP & acct dir.

Initiative Media Worldwide, Atlanta. Rich Simms, exec VP & gm; Maggie McIntyre, sr VP & grp acct dir. — media svcs.

BreatheInteractive, Atlanta. Erin Pennington, mg ptrn. — interactive mktg.

Bromley Communications, Miami. Ana Eberhard, sr prin & grp acct dir. — Hispanic adv.

Matlock Advertising & Public Relations, Atlanta. Matilda Ivey, grp dir. — African-American adv.

58 Berkshire Hathaway

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$34,998	\$28,254	23.9
Sunday magazine	594	1,644	-63.9
B2B magazine	2,589	2,583	0.2
Local magazine	91	17	435.3
Newspaper	10,381	7,681	35.2
National newspaper	1,559	1,973	-21.0
Spanish-language newspaper	54	37	45.9
Network TV	31,202	30,717	1.6
Spot TV	103,573	60,578	71.0
Syndicated TV	21,558	26,844	-19.7
Cable TV network	103,843	57,140	81.7
Network radio	9,590	8,737	9.8
National spot radio	36,985	27,884	32.6
Outdoor	13,939	3,579	289.5
Internet	839	5,671	-85.2
Measured media	371,795	263,339	41.2
Unmeasured media	245,183	173,660	41.2
Total	616,978	436,999	41.2
By brand	2004	2003	% chg
Geico	262,422	168,852	55.4
Dairy Queen	44,668	35,527	25.7
Benjamin Moore	23,968	21,474	11.6
Helzberg Jewelers	12,979	13,055	-0.6

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$74,382	\$63,859	16.5
Earnings	7,308	8,151	-10.3

Sales & earnings (\$ in millions)

U.S.	2004	2003	% chg
Sales	54,806	44,620	22.8
Division sales	2004	2003	% chg
Insurance group	23,927	24,731	-3.3
McLane Company	23,373	13,743	70.1
Shaw Industries (carpet)	5,174	4,660	11.0
Building products	4,337	3,846	12.8
Finance & financial products	3,774	3,045	23.9
Flight services	3,244	2,431	33.4
Other businesses	3,213	3,040	5.7
Retail operations	2,601	2,311	12.5
Apparel	2,200	2,075	6.0

Headquarters

Berkshire Hathaway/1440 Kiewit Plaza, Omaha, Neb. 68154/Phone: (402) 346-1400.

Personnel, brands, agencies

Corporate: Warren Buffett, chmn & CEO.

Acme Building Brands: 2821 W. Seventh, Fort Worth, Texas 76107-2219/Phone: (817) 390-2409. Harrold Melton, pres & CEO; Bill Seidel, VP-mktg & adv.

Felware, Fort Worth, Texas. Matt Felware, pres. — media buying.

Ben Bridge Jeweler: P.O. 1908, Seattle, Wash. 98111/Phone: (206) 448-8800. Jon Bridge, vice chmn & co-CEO; Ed Bridge, pres & co-CEO; Steve Davolt, VP-mktg.

Publicis in the West, Seattle. Kelsey Martin, mgmt super; Andrea Lewellen, acct super.

Benjamin Moore: 51 Chestnut Ridge Rd., Montvale, N.J. 07645/Phone: 201-573-9600. Yvan Dupuy, pres & CEO; Denis Abrams, exec VP & chief operating officer.

Gianettino & Meredith Advertising, Short Hills, N.J. Rick Riccardi, VP & acct super. — Benjamin Moore Paints.

Borsheim's Jewelry: 120 Regency Pkwy., Omaha, Neb. 68114/Phone: (402) 391-0400. Susan M. Jacques, pres & CEO; Adri Geppert, dir-adv & mktg.

Buffalo News: One News Plaza, Buffalo, N.Y. 14240/Phone: (716) 849-3434. Stanford Lipsey, pub; Warren T. Colville, pres; Dottie Gallagher-Cohen, VP-mktg.

Media Pros, Orchard Park, N.Y. Ken Dobmeier, pres. — media buying.

Clayton Homes: 5000 Clayton Rd., Maryville, Tenn. 37804/Phone: (865) 380-3000. Kevin T. Clayton, pres & CEO; Chris Nicely, VP-mktg.

In-house. — Agencies assigned on a project basis.

CORT Business Services: 11250 Waples Mill Rd., Ste. 500, Fairfax, Va. 22030/Phone: (703) 968-8500. Paul Arnold, CEO; Steve Jobs, pres; Lloyd Lenson, chief operating officer.

Arnold Worldwide, McLean, Va. Anne Sabrizi, mgmt super.

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Fruit of the Loom Industries: One Fruit of the Loom Dr., Bowling Green, Ky. 42103/Phone: (207) 781-6400. John B. Holland, pres & CEO; John W. Shivel, sr VP-adv & corp comms; Christie Lindsey, adv mgr.

Richards Group, Dallas. Diane Fannon, principal; Dennis Walker, creative grp head; Ron Henderson, creative grp head; Mary Price, media svcs. — media svcs, Best by Fruit of the Loom, BVD, Fruit of the Loom, FunGals, FunPals, Lofteez, Underoos.

Grupo Gallegos, Long Beach, Calif. John Gallegos, principal. — Hispanic adv.

Garan: 350 Fifth Ave., 19th Fl., New York, N.Y. 10118/Phone: (212) 563-2000. Seymour Lichtenstein, chmn; Jerry Kamiel, pres; Jessica Dietz, dir-mktg.

No agency.

Geico: Government Employee's Insurance Co., 1 Geico Plaza, Washington, D.C. 20076/Phone: (800) 824-5404. Tony Nicely, pres & CEO; Edward W. Ward, VP-mktg.

Martin Agency, Richmond, Va. Paul McKee, exec VP & chief operating officer; Mike Boyd, VP & mgmt super. — Geico Direct auto insurance.

Lopez Negrete Communications, Houston. Alex Lopez Negrete, pres & CEO. — Hispanic adv.

H.H. Brown Shoe Group: 124 W. Putnam Ave., Greenwich, Conn. 06830/Phone: (203) 661-2424. Frank Rooney, chmn; Jim Issler, pres & chief operating officer.

In-house. — Born Shoe Co., Acme Boot, Bolo, Browning, Brunswick Footwear, Carolina Shoe Co., Cove Shoe Co., Dexter Shoe Co., Double-H Boot, HH Brown Shoes, Honda Footwear, Sofft Shoe, Nurse Mates, Orvis, Quark, Softspots.

Helzberg Diamond Shops: 1825 Swift, North Kansas City, Mo. 64112/Phone: (800) 669-7780. Marvin Beasley, chmn; Joyce Hrinya, sr VP-mktg & adv; Linda Baker, dir-adv.

No agency.

International Dairy Queen: 7505 Metro Blvd., P.O. Box 39286, Edina, Minn. 55439/Phone: (952) 830-0200. Charles W. Mooty, pres & CEO; Michael Keller, exec VP-mktg.

Grey Worldwide, New York. Rick Cusato, exec VP-acct dir. — Dairy Queen restaurants.

MediaCom, New York. Larry Sawyer, exec VP & grp dir. — media buying.

Johns Manville: 717 17th St., Denver, Colo. 80202/Phone: (303) 978-2000. Steven B. Hochhauser, chmn, pres & CEO; Paul Gennaro, dir-corp affairs & comms; Melody Dunbar, mgr-corp relations.

Brozena Schaller Menaker & Ripley, Denver. Ed Brozena, pres & CEO; Joe Kramer, sr acct dir. — air handling systems, commercial & ind roofing, engineered products, fire protection systems, pipe & equipment insulations.

McClain Finlon Advertising, Denver. Elana Tapper, acct exec; Cory Ziskind, acct exec. — Formaldehyde-free product line, Comfort Therm, EasyFit.

Jordan's Furniture: 100 Stockwell Dr., Avon, Mass. 02322/Phone: (508) 580-4900. Barry Tatelman, pres; Heather Copelas, dir-pr.

Blitz Media, South Natick, Mass. Marci Cohen, pres. — media buying.

Justin Brands: 610 W. Daggett, Fort Worth, Texas 76104/Phone: (817) 332-4385. Randy Watson, pres & CEO; Armando Romero, dir-adv.

Balcom Agency, Fort Worth, Texas. Deanna Lewis, acct exec. — Justin Boots, Justin Original Work Boots, Tony Lama Boots, Nocona Boots, Chippewa Footwear.

MidAmerica Energy Holdings: 666 Grand Ave., P.O. Box 657, Des Moines, Iowa 50303-0657/Phone: (515) 242-4300. Greg E. Abel, pres; Jack Kelleher, vp-mktg & sls.

Flynn Wright, Des Moines. Jon Miller, acct super.

Nebraska Furniture Mart: 700 S. 72nd St., Omaha, Neb. 68114/Phone: (402) 397-6100. Irv Blumkin, chmn & CEO; Mark Hamilton, dir-mktg; Teri Harold, mgr-adv.

Red Stone Communications, Omaha. Gail Johnston, VP.

In-house. — media buying.

NetJets: 581 Main St., Woodbridge, N.J. 07095/Phone: (877) 356-5823. Richard T. Santulli, chmn & CEO; Steve Zacks, sr VP-mktg.

Kirshenbaum Bond, New York. Jonathan Bond, co-chmn. — NetJets fractional ownership program.

Pampered Chef: 1 Pampered Chef Lane, Addison, Ill. 60101-5630/Phone: (630) 261-8900. Doris Christopher, founder & chmn; Marla Gottschalk, pres & chief operating officer.

No agency.

R.C. Willey Home Furnishings: 2301 S. 300 West, Salt Lake City, Utah 84115/Phone: 801-461-3900. Scott Hymas, CEO; Bill Child, chmn; Clark Yospe, vp-mktg.

In-house.

Scott Fetzer Cos.: 28800 Clemens Rd., Westlake, Ohio 44145/Phone: (440) 892-3000. Campbell Hausfeld: Gary Heeman, pres-air prods; Eric Tinnemeyer, VP-sls; Kim Liechty, pres-power prods; Dan Sanchez, mgr-mktg comms; Hilarie Meyer, dir-mktg; Douglas Quikut: Mike Stuckey, gm; World Book Encyclopedia: Robert Hall, VP-N. Amer. sls.

McNabb Kelley & Barre, Jonesboro, Ark. Chris Barre, ptrn. — Ginsu Knives.

Odell Advertising/Marketing, North Canton, Ohio. Dean Crawford, VP-sls. — American Angler.

In-house. — media buying, Campbell-Hausfeld, Child Craft, Early World of Learning, World Book Multimedia, World Book Encyclopedia, World Book Online Reference Center.

See's Candies: 210 El Camino Real, South San Francisco, Calif. 94080/Phone: (650) 583-7307. Charles N. Huggins, pres; Richard Van Doren, VP-mktg.

Grant Scott & Hurley, San Francisco. Brian Hurley, co-founder & ptrn; Chris Chaffin, dir-creative.

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Shaw Industries: 616 E. Walnut Ave., Dalton, Ga. 30722/Phone: (706) 278-3812. Robert Shaw, chmn & CEO; Julian D. Saul, pres; Buddy Bevil, dir-mktg comms.

In-house.

Star Furniture: 16666 Barker Springs Rd., Houston, Texas 77084/Phone: (281) 492-6661. Bill Ward, pres; Mike Galloway, dir-adv.

Yaffe/Deutser, Houston. Brad Deutser, pres. — bdcast adv.

34 Best Buy Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$39,877	\$29,514	35.1
B2B magazine	1,590	1,477	7.7
Local magazine	11	NA	NA
Newspaper	126,843	146,970	-13.7
National newspaper	15,407	10,547	46.1
Spanish-language newspaper	1,911	1,630	17.2
Network TV	64,946	52,463	23.8
Spot TV	50,288	45,546	10.4
Cable TV network	44,115	24,864	77.4
Spanish-language TV	10,960	3,143	248.7
Network radio	300	300	0.0
National spot radio	88	131	-32.8
Outdoor	628	482	30.3
Internet	32,735	27,749	18.0
Measured media	389,699	344,816	13.0
Unmeasured media	560,785	543,962	3.1
Total	950,484	888,778	6.9
By brand	2004	2003	% chg
Best Buy	387,609	341,682	13.4

Sales & earnings (\$ in millions)

Worldwide	2005	2004	% chg
Sales	\$27,433	\$24,547	11.8
Earnings	984	705	39.6
U.S.	2005	2004	% chg
Sales	24,616	22,225	10.8
Operating income	1,393	1,267	9.9

Headquarters

Best Buy Co./7601 Penn Ave. S., Richfield, Minn. 55423/Phone: (612)291-1000.

Personnel, brands, agencies

Corporate: Brad Anderson, vice chmn & CEO; Brian Dunn, pres-retail N. Amer.; Michael Linton, exec VP & chief mktg officer; Barry Judge, sr VP-mktg; Ruby Anik, VP-adv; Susan Hoff, sr VP & chief comms officer.

Best Buy (In-house) Ruby Anik, VP-adv.

Starcom USA, Chicago. Elizabeth Herbst-Brady, sr VP & dir-natl bdcast. — media buying-natl bdcast.

Avenue A/Razorfish, Seattle. Joe Mele, sr acct dir. — interactive mktg.

Digitas, Boston. Torrence Boone, mg dir-Digitas Chicago. — interactive mktg.

La Comunidad, Miami. Frank Sendra, acct dir. — Hispanic adv.
Rapp Collins Worldwide, New York. Dawn Marie, grp acct dir. — direct mktg.

Tapestry, Chicago. Marla Skiko, media dir. — Hispanic media buying.

47 Bristol-Myers Squibb Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$76,044	\$76,962	-1.2
Sunday magazine	7,486	9,929	-24.6
B2B magazine	610	1,021	-40.3
Spanish-language magazine	11	84	-86.9
Newspaper	5,906	14,804	-60.1
National newspaper	5,582	5,239	6.5
Spanish-language newspaper	5	67	-92.5
FSI	5,466	3,840	42.3
Network TV	94,504	63,938	47.8
Spot TV	5,162	3,624	42.4
Syndicated TV	37,637	21,232	77.3
Cable TV network	43,613	30,895	41.2
National spot radio	382	493	-22.5
Outdoor	855	120	612.5
Internet	8,168	3,911	108.8
Measured media	291,431	236,159	23.4
Unmeasured media	481,447	548,629	-12.2
Total	772,878	784,788	-1.5
By brand	2004	2003	% chg
Plavix	108,924	79,620	36.8
Bristol-Myers Squibb	54,214	24,704	119.5
Excedrin	51,153	51,903	-1.4
Aussie Hair Care Products	24,576	5,050	386.7
Pravachol Cholesterol Rx	22,326	27,668	-19.3
Enfamil	10,404	9,005	15.5

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$19,380	\$18,653	3.9
Earnings	2,388	3,106	-23.1
U.S.	2004	2003	% chg
Sales	10,613	10,656	-0.4
Division sales	2004	2003	% chg
Pharmaceuticals	15,482	14,925	3.7
Nutritionals	2,001	2,023	-1.1
Other Healthcare	1,897	1,705	11.3

Headquarters

Bristol-Myers Squibb Co./345 Park Ave., New York, N.Y. 10154/Phone: (212) 546-4000.

Notes

Bristol-Myers Squibb in early 2005 entered talks to sell its consumer medicine unit which consists primarily of Excedrin products. The company describes the business as a noncore asset, hence disposable, as it concentrates on disease prevention and treatment drugs. In December 2004, the company sold Oncology Therapeutics Network, its cancer drug distributor, to a J.P.

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Morgan Chase private equity company. GlaxoSmithKline is expected to be the primary suitor for the consumer lines. Bristol-Myers Squibb in June 2005 said it would not advertise DTC drugs their first year on the market, and pledged to limit TV advertising "to appropriate audiences at appropriate times of the day." The intent behind the move is to educate doctors about the drug before patients request them.

Personnel, brands, agencies

Corporate: Peter Dolan, CEO.

Mead Johnson Nutritionals: 2400 W. Lloyd Expy., Evansville, Ind. 47721/Phone: (812) 429-5000. Randall Alsman, pres.

Ogilvy & Mather Worldwide, New York. — Enfamil, Enfamil AR.

U.S. Pharmaceutical Group: 777 Scudders Mill Rd., Plainsboro, N.J. 08536/Phone: (609) 897-2000. Donald J. Heyden, exec VP & pres-Americas; Wendy Dixon, chief mktg officer; Tom Chetrick, VP-mktg svcs.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; Michael Parisi, exec VP & gm-Altum. — Edifoligide, new products.

Euro RSCG Life Adrenaline, New York. Terry Gallo, pres; Richard Marshall, sr VP & dir-client svcs. — Reyataz, Sustiva, new prods.

Euro RSCG Life Chelsea, New York. Ed Stapor, pres; John Kalimtzis, exec VP & dir-client svcs. — Tequin.

Health@JWT, New York. Howard Cortemanche, U.S. acct dir. — Abilify, Glucophage XR, Glucovance, Metaglip, Bufferin.

Gotham, New York. Marty Smith, vice chmn. — Comtrex, Keri hand lotion.

Saatchi & Saatchi Healthcare, New York. Bob Hogan, exec VP & mg dir. — cons awareness adv, Plavix.

Under The Radar, Dobbs Ferry, N.Y. Jimmy Cohen, chmn; Tom Wambauch, pres. — Excedrin, Excedrin PM.

MindShare Worldwide, New York. AJ Storinge, sr ptnr & grp plng dir. — media svcs.

67 Burger King Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$9,711	\$3,578	171.4
Sunday magazine	198	NA	NA
B2B magazine	193	91	112.1
Local magazine	73	62	17.7
Spanish-language magazine	244	NA	NA
Newspaper	264	177	49.2
National newspaper	339	343	-1.2
Spanish-language newspaper	22	NA	NA
Network TV	154,743	140,360	10.2
Spot TV	7,283	16,868	-56.8
Syndicated TV	46,651	41,567	12.2
Cable TV network	54,800	48,499	13.0
Spanish-language TV	23,099	19,501	18.5
Network radio	NA	1,245	NA
National spot radio	12,348	16,735	-26.2

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Outdoor	3,736	4,470	-16.4
Internet	739	1,431	-48.4
Measured media	314,443	294,927	6.6
Unmeasured media	227,700	230,717	-1.3
Total	542,143	525,644	3.1
By brand	2004	2003	% chg
Burger King	313,381	294,796	6.3

Sales & earnings (\$ in millions)

U.S.	2004	2003	% chg
Sales*	\$7,710	\$7,900	-2.4

Headquarters

Burger King Corp./5505 Blue Lagoon Dr., Miami, Fla. 33126/Phone: (305) 378-3000.

Notes

Greg Brenneman replaced Brad Blum as CEO in July 2004 shortly after Mr. Blum, who had been CEO for a year and a half, left the company. Mr. Brenneman was formerly head of PricewaterhouseCoopers. Burger King is owned by Texas Pacific Group. *Sales are from Technomic.

Personnel, brands, agencies

Corporate: Greg Brenneman, CEO & chmn; Russ Klein, exec VP & chief global mktg officer; John Chidsey, pres-Americas; Mike Kappitt, VP-cons insight.

Crispin Porter & Bogusky, Miami. Jeff Hicks, CEO & pres.

MindShare Worldwide, New York. Shari Cohen, pres & co-exec dir-natl bdcast. — media svcs.

Bromley Communications, San Antonio. Jessica Pantanini, chief ops officer. — Hispanic adv.

Campbell Mithun, Minneapolis. Tim Hawley, sr VP & gm. — kids/youth & family mktg.

Equity Marketing, Los Angeles. Jon Banks, pres. — sls promo.

Premium Surge, Chicago. Pam Crain, exec VP-client svcs. — sls promo.

VML, Kansas City, Mo. Matt Anthony, chief client officer. — interactive mktg.

UniWorld Group, Miami. Jamal Ali, grp acct dir; Fiona Roache, dir-client svcs. — African-American adv.

91 Cadbury Schweppes

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$10,423	\$7,672	35.9
B2B magazine	1,871	2,317	-19.2
Local magazine	27	31	-12.9
Newspaper	954	141	576.6
National newspaper	536	5	NA
Spanish-language newspaper	8	NA	NA
FSI	3,548	5,627	-36.9
Network TV	142,175	139,983	1.6
Spot TV	11,095	9,172	21.0
Syndicated TV	8,765	10,650	-17.7

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Cable TV network	61,203	42,557	43.8
Spanish-language TV	9,425	10,504	-10.3
Network radio	NA	1,620	NA
National spot radio	676	2,626	-74.3
Outdoor	3,773	1,953	93.2
Internet	2,075	1,142	81.7
Measured media	256,554	236,000	8.7
Unmeasured media	118,270	104,819	12.8
Total	374,824	340,819	10.0
By brand	2004	2003	% chg
Dr. Pepper	104,762	96,387	8.7
7Up	34,608	25,071	38.0
Trident	33,912	34,101	-0.6
Dentyne	29,934	23,783	25.9
Halls Cough products	19,298	21,340	-9.6
Snapple	11,936	11,255	6.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$12,390	\$11,844	4.6
Earnings	1,561	1,731	-9.8
U.S.	2004	2003	% chg
Sales	5,080	4,417	15.0
Operating profit	1,480	875	69.1
Division sales	2004	2003	% chg
EMEA	4,089	NA	NA
Americas beverages	3,098	2,984	3.8
Asia Pacific	1,982	NA	NA
Americas confectionary	1,982	1,433	38.3
Europe beverages	1,239	NA	NA

Headquarters

Cadbury Schweppes, 25 Berkeley Square, London, United Kingdom W1J 6HB/Phone: 44-171- 409-1313.

Cadbury Schweppes/Americas Beverages/5301 Legacy Dr., Plano, Texas 75024/Phone: (972) 673-7000.

Personnel, brands, agencies

Corporate: John Sunderland, exec chmn; Todd Stitzer, CEO.

Americas Beverages: 5301 Legacy Dr., Plano, Texas 75024/Phone: (972) 673-7000. Gilbert Cassagne, pres; Randy Gier, exec VP-mktg; Steve Jarmon, VP-mktg resources; Jim Trebilcock, sr VP-cons mktg; Holly Mensch, VP-mktg, Snapple; Maura Mottotese, VP-strategic bus; Alice Nolan, VP-media.

Boathouse Group, Waltham, Mass. John Connor, ptrn. — Nantucket Nectars.

Cliff Freeman & Partners, New York. Grant Wagner, VP & grp acct dir. — Snapple.

Del Rivero Messianu DDB, Miami. Sylvia Curran, acct dir. — Clamato.

Y&R, New York. Amy Frisch, mg ptrn. — 7 UP, Dr Pepper, Sunkist.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & dir-client svcs; Cathy Goodin, mg ptrn. — media svcs, Dr Pepper, 7 Up, Snapple, Motts.

Cadbury Adams: 400 Interpace Pkwy., Building B, Parsippany, N.J. 07054/Phone: (973) 385-0187. Brad Irwin, pres.

Deutsch, New York. Val DiFebo, mg ptrn & gm. — Bassett's Licorice, Hawaiian Punch Soft & Chewy Candy, Sour Patch Kids, Swedish Fish.

JWT, New York. Peter Grossman, global bus dir. — Bubbaloo, Bubblicious, Chiclets, Chiclets Ice, Halls, Halls Fruit Breezers, Halls VitaC, Trident gum, Trident Advantage, Trident for Kids, Trident White.

McCann Erickson Worldwide, New York. — Dentyne.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & dir-client svcs; Cathy Goodin, mg ptrn.— media svcs.

84 Campbell Soup Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$75,597	\$64,089	18.0
Sunday magazine	4,607	9,604	-52.0
B2B magazine	1,116	1,102	1.3
Local magazine	20	47	-57.4
Newspaper	729	942	-22.6
National newspaper	147	282	-47.9
FSI	23,226	26,082	-11.0
Network TV	120,539	108,126	11.5
Spot TV	11,728	27,168	-56.8
Syndicated TV	15,708	22,628	-30.6
Cable TV network	65,096	56,032	16.2
Spanish-language TV	1,447	467	209.9
Network radio	1,962	6,213	-68.4
National spot radio	673	374	79.9
Outdoor	1,001	1,241	-19.3
Internet	5,868	9,745	-39.8
Measured media	329,464	334,142	-1.4
Unmeasured media	95,866	96,060	-0.2
Total	425,330	430,202	-1.1
By brand	2004	2003	% chg
Campbell Soup	148,902	129,460	15.0
Pepperidge Farm	44,155	64,182	-31.2
V8	42,921	42,501	1.0
Prego	30,533	23,320	30.9
Swanson Broth	19,381	11,665	66.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$7,109	\$6,678	6.5
Earnings	647	595	8.7
U.S.	2004	2003	% chg
Sales	4,581	4,549	0.7
Earnings bef. interest & taxes	1,115	1,105	0.9
Division sales	2004	2003	% chg
NA Soup & Away From Home	2,699	2,606	3.6
Biscuits & Confectionary	1,982	1,774	11.7
NA Sauces & Beverages	1,246	1,246	0.0
International Soup & Sauces	1,182	1,052	12.4

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Headquarters

Campbell Soup Co./World Headquarters, 1 Campbell Place, Camden, N.J. 08103-1799/Phone: (856) 342-4800.

Personnel, brands, agencies

Corporate: Douglas R. Conant, pres & CEO; Mark Sarvary, exec VP & pres-Campbell N. Amer.; M. Carl Johnson, sr VP-corp strategy, bus devel & sls tech; Paul Alexander, VP-global adv.

Godiva Chocolatier: 355 Lexington Ave., New York, N.Y. 10017/Phone: (212) 984-5900. Jim Goldman, pres-Godiva ww; Eugene Dunkin, pres-Godiva N. Amer.; Geralyn R. Breig, pres-Godiva intl; Sharon Rothstein, VP-global mktg & merch.

Margeotes Fertitta & Partners, New York. George Fertitta, pres; Liz Morrow, media dir-Godiva. — Godiva candy.

Pepperidge Farm: 595 Westport Ave., Norwalk, Conn. 06851/Phone: (203) 846-7000. Jay Gould, pres; Patrick J. Callaghan, sr VP-bus devel & pres-frozen foods; Michael Simon, VP & gm-Pepperidge Farms snacks div.

Y&R, New York. Shelley Diamond, exec VP & mg dir — Bakery, Goldfish, Pepperidge Farm cookies.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Suzanne Kaufman, mg ptrn & acct dir-media buying. — media buying.

U.S. Soup, Sauces & Beverages: Campbell Place, Camden, N.J. 08103-1799/Phone: (856) 342-4800. Denise Morrison, pres; Sean Connolly, VP & gm-soup & meal consumption; Lynn Ambrosia, VP & gm-sauces & meal preparation; Diane Teer, VP & gm-beverages.

BBDO Worldwide, New York. Tom Sebok, exec VP & mg dir. — Campbell's condensed soups, new prods, Select soups, Soup at Hand, Swanson broth.

Y&R, New York. Shelley Diamond, exec VP & mg dir — Chunky Soup, Kids soups, Spaghetios, Pace sauces, Prego sauces, V8 beverages.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Suzanne Kaufman, mg ptrn & acct dir-media buying. — media buying.

77 Capital One Financial Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$14,062	\$910	NA
Sunday magazine	1,815	22	NA
B2B magazine	28	52	-46.2
Spanish-language magazine	NA	102	NA
Newspaper	3,822	10,313	-62.9
National newspaper	967	1,590	-39.2
Network TV	196,067	107,890	81.7
Spot TV	4,615	1,783	158.8
Syndicated TV	65,151	33,496	94.5
Cable TV network	66,844	35,235	89.7
Network radio	1,289	NA	NA
National spot radio	16	NA	NA
Outdoor	NA	25	NA

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Internet	6,356	1,489	326.9
Measured media	361,032	192,907	87.2
Unmeasured media	126,849	157,833	-19.6
Total	487,881	350,740	39.1
By brand	2004	2003	% chg
Capital One	361,031	192,908	87.2

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$8,903	\$8,201	8.6
Earnings	1,544	1,136	35.9
U.S.	2004	2003	% chg
Sales	7,873	7,462	5.5

Headquarters

Capital One Financial Corp./2980 Fairview Park Dr., Ste. 1300, Falls Church, Va. 22042/Phone: (703) 205-1000.

Personnel, brands, agencies

Corporate: Richard D. Fairbank, chmn, pres & CEO; Catherine West, pres-U.S. cards; Peter A. Schnall, exec VP & chief credit officer; Marjorie M. Connelly, exec VP-enterprise svcs grp; Larry Klane, exec VP-corp devel; William McDonald, exec VP-brand mktg; Catherine G. West, exec VP-U.S. cons opers.

DDB Worldwide Communications, Chicago. Bob Sutter, grp bus dir. Capital One.

Element 79 Partners, Chicago. Lisa Dauderman, mg dir. — Capital One.

Halogen, New York. Jason Lim, VP & grp dir. — Capital One.

MediaVest USA, New York. Laura Desmond, CEO; Donna Speciale, pres-bdcast & programming; John McNamara, CEO (Halogen Response). — media svcs.

Capital One Auto Finance: 3901 N. Dallas Pkwy., Plano, Texas 75093/Phone: (800) 689-1789. David R. Lawson, pres & CEO; Kyle D. Shidler, VP & chief operating officer; Daniel P. Friedman, VP-mktg analysis.

In-house.

44 Cendant Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$18,065	\$17,153	5.3
Sunday magazine	NA	446	NA
B2B magazine	3,906	3,127	24.9
Local magazine	565	395	43.0
Spanish-language magazine	108	9	NA
Newspaper	28,567	32,305	-11.6
National newspaper	6,696	6,840	-2.1
Spanish-language newspaper	286	91	214.3
Network TV	42,062	28,410	48.1
Spot TV	8,121	9,293	-12.6
Syndicated TV	21,859	17,565	24.4
Cable TV network	51,940	45,331	14.6
Spanish-language TV	4,238	3,994	6.1

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Network radio	11,683	2,026	476.7
National spot radio	2,635	3,688	-28.6
Outdoor	28,451	25,493	11.6
Internet	51,903	12,140	327.5
Yellow Pages	7,000	7,000	0.0
Measured media	288,085	215,306	33.8
Unmeasured media	515,015	479,789	7.3
Total	803,100	695,095	15.5
By brand	2004	2003	% chg
Coldwell Banker	52,962	21,616	145.0
Century 21	47,030	42,864	9.7
Avis	44,459	24,204	83.7
Budget Rent-A-Car	26,371	29,855	-11.7
Cheap Tickets	22,368	19,221	16.4
Jackson Hewitt	18,846	13,199	42.8
Days Inn	11,632	10,974	6.0
Era Realty	11,291	4,252	165.6

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$19,785	\$18,015	9.8
Earnings	2,082	1,172	77.6
U.S.	2004	2003	% chg
Sales	17,378	15,820	9.8
Division sales	2004	2003	% chg
Real estate svcs	6,246	5,258	18.8
Vehicle svcs	6,231	5,851	6.5
Hospitality svcs	2,882	2,523	14.2
Travel distribution svcs	1,788	1,659	7.8
Marketing svcs	1,499	1,224	22.5
Mortgage svcs	1,111	1,483	-25.1

Headquarters

Cendant Corp./9 W. 57th St., New York, N.Y. 10019/Phone: (212) 413-1800.

Personnel, brands, agencies

Corporate: Henry R. Silverman, chmn, pres & CEO; Ronald Nelson, pres & cfo; Stephen P. Holmes, vice chmn & chmn & CEO-travel content div; Kevin M. Sheehan, chmn & CEO-vehicle svcs div; Samuel L. Katz, chmn & CEO-travel distribution div; Richard A. Smith, chmn & CEO-real estate div.

AmeriHost Franchise Systems: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Keith Pierce, pres & CEO; Keri Putera, sr dir-mktg.

Ad Studio, Miami. Armando Lopez, pres & creative dir. — media svcs.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Avis Rent A Car System: 6 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-3500. F. Robert Salerno, pres & CEO; Scott Deaver, exec VP-mktg.

McCann Erickson Worldwide, New York. Kevin Scher, sr VP & grp mg dir. — Avis Rent A Car.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Impax Marketing Group, Philadelphia. Lisa Palmarini, VP. — sls promo, channel mktg.

Budget Rent A Car System: 6 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-3500. F. Robert Salerno, pres & CEO; Scott Deaver, exec VP-mktg.

McCann Erickson Worldwide, New York. Kevin Scher, sr VP & grp mg dir. — Budget Rent A Car.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Impax Marketing Group, Philadelphia. Lisa Palmarini, VP. — sls promo, channel mktg.

Century 21 Real Estate Corp.: 1 Campus Dr., Parsippany, N.J. 07054/Phone: (973) 428-9700. Van Davis, pres & CEO; John Greenleaf, sr VP-mktg; Ken Toumey, VP-brand mgmt.

Lowe Worldwide, New York. Todd Stanley, exec VP & mg dir. — Century 21 realty.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Blue Dingo, New York. Joe Beatrice, CEO. — interactive mktg.

Octagon, Norwalk, Conn. Woody Thompson, VP-Octagon consultancy. — sports & event mktg, MLB National Thoroughbred Racing Association.

Vidal Partnership, New York. Joe Gutierrez, acct dir. — Hispanic adv, Hispanic mktg & comms.

Cheap Tickets: 7 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-0900. Evans Gebhardt, pres, Cendant's Retail Travel Svcs Div.

Grey E Marketing, New York. Adam Komack, sr VP & grp acct dir. — Cheap Tickets online travel brokerage.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Coldwell Banker: 1 Campus Dr., Parsippany, N.J. 07054/Phone: (973) 428-9700. Alex Perriello, pres & CEO; Regina Taylor, sr VP-mktg; Barbara Salerno, VP-adv & special mkts; Monica Stickel, VP-affiliate mktg; Jennifer Smith, VP-strategic bus devel.

Kaplan Thaler Group, New York. Robin Koval, chief mktg officer & gm. — Coldwell Banker realty.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Bootstrap Software, New York. Jay Erickson, CEO. — interactive mktg.

Kinesis, New York. Andreas Panayi, CEO. — interactive mktg.

Days Inns Worldwide: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Joe Kane, pres; Chris Trick, VP-mktg.

Decker, Glastonbury, Conn. Craig Cheyne, pres & CEO. — Days Inn hotels.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

ERA Real Estate: 1 Campus Dr., Parsippany, N.J. 07054/Phone: (973) 428-9700. Brenda W. Casserly, pres & chief operating officer; P.J. Martin Smith, sr VP-mktg; Patrick Andriani, VP-brand mgmt.

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Catalano, Lellos & Silverstein, New York. Brit Rollins, acct representative. —ERA Real Estate

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Fairfield Resorts: 8427 South Park Circle, Orlando, Fla. 32819/Phone: (407) 370-5200. Franz S. Hanning, pres & CEO; Bryant Raper, sr VP-mktg.

No agency.

Howard Johnson International: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Ken Greene, pres; Steve Ty Burski, sr dir-mktg.

Bezos/Nathanson Marketing Group, New York. David Nathanson, ptnr & chief creative officer; Mark Bezos, ptnr & CEO.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Jackson Hewitt: 7 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-1040. Michael Lister, pres & chief operating officer; Peter Tahinos, sr VP-mktg.

DeVito/Verdi, New York. Ellis Verdi, pres. — Jackson Hewitt tax svcs.

Grafica Group, Chester, N.J. John Flores, VP-interactive. — online media.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Knights Franchise Systems: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Rajiv Bhatia, pres; Rosanne Zusman, sr dir-mktg.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Lodging.com: 455 N. Federal Hwy., Ste. O, Boca Raton, Fla. 33487/Phone: (888) 563-4464. Fred Bean, VP-sls.

No agency.

Ramada Worldwide: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-9700. Keith Pierce, pres; Keri Putera, sr dir-mktg.

Bezos/Nathanson Marketing Group, New York. David Nathanson, ptnr & chief creative officer; Mark Bezos, founding ptnr. — Ramada hotels.

Ad Studio, Miami. Armando Lopez, pres & creative dir. — media svcs.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Super 8 Motels: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 496-8441. John Valletta, pres; Rosanne Zusman, sr dir-mktg.

Watson, Richmon, Va. Kristi Ashley, acct dir. — Super 8 Motels.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Travelodge: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Nancy Poor, pres; Andy Maguire, sr dir-mktg.

Bezos/Nathanson Marketing Group, New York. David Nathanson, ptnr & chief creative officer; Mark Bezos, ptnr & CEO.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Villager Lodge Franchise Systems: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Rajiv Bhatia, pres; Rosanne Zusman, sr dir-mktg.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

Wingate Inns International: 1 Sylvan Way, Parsippany, N.J. 07054/Phone: (973) 428-9700. Keith Pierce, pres & CEO; Keri Putera, sr dir-mktg.

Ad Studio, Miami. Armando Lopez, pres & creative dir. — media svcs.

MediaCom, New York. Brooke Goldstein, sr VP & AOR dir. — media svcs.

98 Circuit City Stores

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$3,899	\$16,109	-75.8
B2B magazine	416	576	-27.8
Newspaper	62,727	56,194	11.6
National newspaper	7,578	10,877	-30.3
Spanish-language newspaper ...	198	398	-50.3
FSI	1	10	-90.0
Network TV	36,217	85,405	-57.6
Spot TV	50,004	35,434	41.1
Cable TV network	32,062	15,608	105.4
Spanish-language TV	NA	219	NA
Network radio	3,132	NA	NA
National spot radio	674	NA	NA
Outdoor	157	92	70.7
Internet	32,185	24,090	33.6
Measured media	229,250	245,012	-6.4
Unmeasured media	120,749	131,914	-8.5
Total	349,999	376,926	-7.1
By brand	2004	2003	% chg
Circuit City	229,206	245,001	-6.4

Sales & earnings (\$ in millions)

Worldwide	2005	2004	% chg
Sales	\$10,472	\$9,857	-2.1
Earnings from continuing opers	.62	-1	NA
U.S.	2005	2004	% chg
Sales	\$10,018	NA	NA
Earnings from continuing opers	.58	NA	NA

Headquarters

Circuit City Stores/9950 Mayland Dr., Richmond, Va. 23233-1464/Phone: (804) 527-4000.

Personnel, brands, agencies

Corporate: W. Alan McCollough, chmn & CEO; Phil Schoonover, pres & sr VP; Doug Moore, sr VP & chief merch officer.

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Doner, Detroit. Ken Banks, exec VP & acct mg dir. Circuit City stores.

In-house. — media buying.

R/GA, New York. John Antinori, exec producer. — interactive mktg, e-commerce devel.

32 Citigroup

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$118,444	\$76,322	55.2
Sunday magazine	28,324	5,905	379.7
B2B magazine	2,873	3,396	-15.4
Local magazine	162	22	636.4
Spanish-language magazine	292	240	21.7
Newspaper	63,233	25,227	150.7
National newspaper	21,717	9,309	133.3
Spanish-language newspaper	1,405	1,279	9.9
Network TV	218,909	44,719	389.5
Spot TV	13,251	17,663	-25.0
Syndicated TV	20,347	5,902	244.7
Cable TV network	53,761	24,687	117.8
Network radio	330	NA	NA
National spot radio	1,638	6,284	-73.9
Outdoor	11,203	9,428	18.8
Internet	54,479	52,910	3.0
Measured media	610,368	283,293	115.5
Unmeasured media	390,235	171,800	127.1
Total	1,000,603	455,093	119.9
By brand	2004	2003	% chg
Citibank	549,666	252,447	117.7
Salomon Smith Barney	33,062	22,045	50.0
AT&T Universal Cards	11,289	978	1054.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$86,190	\$77,442	11.3
Earnings	17,046	17,853	-4.5
Division sales	2004	2003	% chg
Global Consumer	62,057	41,195	50.6
Global Corp. & Inv. Bank	11,205	20,040	-44.1
Global Inv. Management	6,895	NA	NA
Global Wealth Management	6,033	NA	NA

Headquarters

Citigroup/399 Park Ave., New York, N.Y. 10043/Phone: (212) 559-1000.

Personnel, brands, agencies

Corporate: Sanford I. Weill, chmn; Charles Prince, CEO & dir; Brad Jakeman, dir-global adv.

Merkley & Partners, New York. Lou Killeffer, chief mktg officer.

Global Consumer Group: 399 Park Ave., New York, N.Y. 10022/Phone: (212) 559-1000. Marjorie Wagner, chmn & CEO; Anne MacDonald, chief mktg officer.

Merkley & Partners, New York. Coleen Cahill, gr acct dir. — Citigroup Investment Banking, Women & Co.

Smith Barney: 388 Greenwich St. 38th Fl., New York, N.Y. 10043/Phone: (212) 816-6000. Todd Thomson, chmn & CEO.

Merkley & Partners, New York. Coleen Cahill, gr acct dir. — Smith Barney.

73 Clorox Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$175,275	\$190,156	-7.8
Sunday magazine	4,760	11,418	-58.3
B2B magazine	NA	32	NA
Spanish-language magazine	72	NA	NA
Newspaper	2,347	717	227.3
National newspaper	510	15	NA
Spanish-language newspaper	1	1	0.0
FSI	8,272	11,157	-25.9
Network TV	95,061	118,302	-19.6
Spot TV	21,618	21,927	-1.4
Syndicated TV	34,952	40,128	-12.9
Cable TV network	81,113	82,401	-1.6
Spanish-language TV	18,490	30,499	-39.4
Network radio	1,741	1,978	-12.0
National spot radio	848	814	4.2
Outdoor	1,594	14	NA
Internet	213	445	-52.1
Measured media	446,867	510,004	-12.4
Unmeasured media	75,270	55,924	34.6
Total	522,137	565,928	-7.7
By brand	2004	2003	% chg
Clorox	200,060	197,804	1.1
Glad Bags	79,776	75,848	5.2
Hidden Valley	40,436	42,707	-5.3
Brita	24,859	37,702	-34.1
Pine-Sol	16,312	32,981	-50.5
Tilex	13,768	16,458	-16.3
Armor All	11,785	21,754	-45.8
Fresh Step	11,102	14,883	-25.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$4,324	\$4,144	4.3
Earnings	549	493	11.4
Division sales	2004	2003	% chg
Household prods-N. Amer.	2,300	2,282	0.8
Specialty prods	1,400	1,369	2.3
Household prods-Latin Amer./Other	600	493	21.7

Headquarters

Clorox Co./1221 Broadway, Oakland, Calif. 94612/Phone: (510) 271-7000.

Personnel, brands, agencies

Corporate: Jerry Johnston, chmn & CEO; Larry Peiros, grp VP; Derek Gordon, VP-mktg; Scott Weiss, VP & gm-Brita & Canada; Glenn Savage, VP & gm-laundry & homecare; Beth Springer, VP & gm-Glad prods; Tarang Amin, VP-mktg, home care; Dan Dahlgren, VP & category mgr-auto care; Thomas Britanik, VP-

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mktg, specialty prods; Anthony Gerst, VP-brand mktg; Doug Milliken, VP-brand devel.

DDB Worldwide Communications, San Francisco. Mary Moudry, pres. — Armor All car protectant, Brita water filters, Clorox bleaches & cleaners, Formula 409, Fresh Step cat litter, Glad trash & storage bags, Hidden Valley salad dressings, K.C. Masterpiece BBQ Sauces, Pine-Sol cleaner, Tilex cleaner.

OMD Worldwide, San Francisco. Laura Bracken, dir (SF); Stacey Larson, dir (NY). — media buying.

Dieste, Harmel & Partners, San Francisco. Larissa Acosta, gm. — Hispanic adv, Brita water filters, Clorox disinfecting wipes, Clorox liquid bleach, Glad trash bags, Kingsford charcoal, Pine-Sol.

68 Coca-Cola Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$22,998	\$18,719	22.9
Sunday magazine	NA	597	NA
B2B magazine	2,183	2,034	7.3
Local magazine	14	23	-39.1
Spanish-language magazine	20	490	-95.9
Newspaper	905	1,486	-39.1
National newspaper	665	564	17.9
Spanish-language newspaper	176	112	57.1
FSI	1,039	2,314	-55.1
Network TV	215,561	134,817	59.9
Spot TV	11,263	21,092	-46.6
Syndicated TV	3,475	5,758	-39.6
Cable TV network	75,480	52,789	43.0
Spanish-language TV	25,235	20,849	21.0
Network radio	4,706	2,927	60.8
National spot radio	64	1,418	-95.5
Outdoor	12,333	6,513	89.4
Internet	3,308	3,192	3.6
Measured media	379,425	275,694	37.6
Unmeasured media	161,126	171,706	-6.2
Total	540,551	447,400	20.8
By brand	2004	2003	% chg
Coca-Cola	246,243	167,675	46.9
Sprite	45,035	31,835	41.5
Minute Maid	35,797	21,097	69.7
Dasani	17,633	18,833	-6.4
Simply Orange	11,723	14,368	-18.4
Powerade	11,008	10,100	9.0

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$21,962	\$21,044	4.4
Earnings	4,847	4,347	11.5
North America	2004	2003	% chg
Sales	6,643	6,344	4.7
Operating income	1,606	1,282	25.3

Headquarters

Coca-Cola Co./1 Coca-Cola Plaza, Atlanta, Ga. 30313/Phone: (404) 676-2121.

Notes

Coca-Cola says \$125 million of 2005's worldwide \$400 million increase in marketing and innovation-related spending will go to North America. Included in the spending are new iconic TV ads to revive the Coke brand. E. Neville Isdell, chmn and CEO, said Coca-Cola would add more to its diet-soda lineup beyond Diet Coke Sweetened with Splenda, which launched in the U.S. in May 05.

Personnel, brands, agencies

Corporate: E. Neville Isdell, chmn & CEO; Chuck Fruit, sr VP & chief mktg officer.

Grey Worldwide, Atlanta. Mark Goldman, pres.

Coca-Cola North America: 1 Coca-Cola Plaza, Atlanta, Ga. 30313/Phone: (404) 676-2121. Donald Knauss, pres; John Hackett, VP-mktg.

Anomaly, New York. Ernest Lupinacci, ptrn. — Dasani.

Berlin Cameron/Red Cell, New York. Ewen Cameron, CEO. — C2, Coca-Cola Classic, COOL from Nestea, Mello Yello, Pibb Xtra.

Campbell Mithun, Minneapolis. Donna Wiederkehr, mgmt super. — Citra, Fresca, new prod devel.

Doner, Southfield, Mich. Monica Tysell, exec VP & acct mgmt dir. — Simply Orange.

Foote Cone & Belding Worldwide, New York. Chris Reintz, sr VP & ww acct dir. — Diet Coke, Diet Coke with Lime.

Martin Agency, Richmond, Va. Mike Hughes, pres & creative dir; Jenna Moran, VP, acct super. — Vanilla Coke.

Mother, New York. Rob Thorsen, strategist. — Full Throttle.

Ogilvy & Mather Worldwide, New York. Scott Flood, sr ptrn & ww mg dir. — Fanta, Sprite.

Publicis USA, New York. Gill C. Duff, pres & CEO. — Coca-Cola Classic.

Wieden & Kennedy, Portland, Ore. John Russell, acct dir. — PowerAde.

Starcom MediaVest, New York. Nancy Mullahy, exec dir. — media svcs.

Agencies assigned on a project basis. — regional agencies, Barq's.

Burrell Communications Group, Chicago. McGhee Williams, co-CEO. — African-American adv, Coke.

Fitzgerald & Co., Atlanta. Lisa Galanti, mg dir; Chris Hooper, acct dir. — N. Amer. regional adv.

Lapiz, Chicago. Marco Azucena, acct super. — Hispanic adv, Coca-Cola Classic, Coke with Lime.

Coca-Cola North America Juices, Teas & Emerging Brands:

2000 St. James Place, Houston, Texas 77056/Phone: (713) 888-5000. Mike Saint John, sr VP & gm; Charles Torrey, grp dir-Minute Maid/refrigerated; John Roddey, grp dir-kids; Laura Lopez, VP-bottler juice brand team; Steve McCormick, gm & chief operating officer-Odwalla.

Doner, Southfield, Mich. Monica Tysell, exec VP & acct mgmt dir. — Minute Maid.

Starcom MediaVest, New York. Nancy Mullahy, exec dir. — media svcs.

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95 ConAgra Foods

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$21,376	\$60,911	-64.9
Sunday magazine	6,695	5,301	26.3
B2B magazine	1,388	3,047	-54.4
Local magazine	NA	12	NA
Spanish-language magazine	21	NA	NA
Newspaper	90	739	-87.8
National newspaper	32	34	-5.9
Spanish-language newspaper	NA	1	NA
FSI	26,081	29,661	-12.1
Network TV	47,799	51,316	-6.9
Spot TV	3,349	11,043	-69.7
Syndicated TV	16,618	19,266	-13.7
Cable TV network	28,892	28,385	1.8
Spanish-language TV	NA	500	NA
Network radio	328	3,715	-91.2
National spot radio	1,858	4,324	-57.0
Outdoor	167	248	-32.7
Internet	2,365	1,755	34.8
Measured media	157,059	220,258	-28.7
Unmeasured media	206,768	340,318	-39.2
Total	363,827	560,576	-35.1

By brand	2004	2003	% chg
Banquet Frozen Entrees	18,955	7,708	145.9
Chef Boyardee	12,025	16,844	-28.6
Orville Redenbacher	11,523	20,399	-43.5
Pam Cooking Spray	11,512	9,868	16.7
Healthy Choice	11,298	30,507	-63.0
Marie Callenders	10,584	10,983	-3.6

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$14,522	\$16,939	-14.3
Earnings	880	775	13.5

U.S.	2004	2003	% chg
Sales	13,222	15,439	-14.4

Division sales	2004	2003	% chg
Retail Products	8,434	8,668	-2.7
Foodservice products	3,714	3,598	3.2
Food Ingredients	2,374	2,204	7.7
Meat Processing	0	2,469	NA

Headquarters

ConAgra Foods/1 ConAgra Dr., Omaha, Neb. 68102/Phone: (402) 595-4000.

Notes

During fiscal 2004, ConAgra continued to divest its non-core businesses, including its chicken business, the U.S. and Canadian crop inputs operations and its Spanish feed business. These divestitures, combined with prior year divestitures of the company's fresh beef and pork, canned seafood and cheese operations substantially complete a multi-year program aimed at divesting the company's significant non-core businesses, the company said. ConAgra is focusing on branded, value-added foods.

Personnel, brands, agencies

Corporate: Bruce Rohde, chmn & CEO.

ConAgra Foods Retail Products: 5 ConAgra Dr., Omaha, Neb. 68102/Phone: (402) 595- 6000. Dennis F. O'Brien, pres & chief operating officer.

Cramer-Krasselt, Chicago. Mindy Kearns, sr acct exec. — Cook's Ham.

DDB Worldwide Communications, San Francisco. Mary Moudry, pres. — Banquet frozen foods, Banquet Dessert Bakes, Banquet Homestyle Bakes, Hunt's snack pack, Swiss Miss cocoa.

Fogarty Klein Monroe, Houston. Magdalena Jansen, acct dir. — Hunt's.

Leo Burnett Worldwide, Chicago. Chris Lindblad, exec VP & acct dir. — Healthy Choice frozen foods, Healthy Choice Ice Cream & Novelties, Chef Boyardee, PAM, Healthy Choice Soup, Healthy Choice Deli.

Wonder Group, Cincinnati. Tim Coffey, chmn & CEO. — Kid's Cuisine frozen dinners.

MediaCom, New York. Linda Narby, sr VP & grp dir; Catherine Hahn, sr VP & grp dir. — media svcs.

6 DaimlerChrysler

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$350,466	\$307,220	14.1
Sunday magazine	3,886	1,472	164.0
B2B magazine	9,628	10,317	-6.7
Local magazine	295	615	-52.0
Spanish-language magazine	3,385	2,664	27.1
Newspaper	133,512	226,626	-41.1
National newspaper	32,513	25,189	29.1
Spanish-language newspaper	811	852	-4.8
FSI	1	NA	NA
Network TV	359,361	241,888	48.6
Spot TV	604,577	596,171	1.4
Syndicated TV	3,660	3,125	17.1
Cable TV network	173,339	93,401	85.6
Spanish-language TV	44,873	24,797	81.0
Network radio	3,947	2,002	97.2
National spot radio	9,007	26,151	-65.6
Outdoor	23,805	14,623	62.8
Internet	40,302	21,390	88.4
Yellow Pages	13,260	8,294	59.9
Measured media	1,810,628	1,606,797	12.7
Unmeasured media	651,518	779,028	-16.4
Total	2,462,146	2,385,825	3.2

By brand	2004	2003	% chg
Dodge	707,623	577,407	22.6
Chrysler	540,882	516,473	4.7
Jeep	353,918	335,266	5.6
Mercedes-Benz	177,356	146,057	21.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$192,319	\$155,719	23.5
Earnings	3,338	511	553.2

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U.S.	2004	2003	% chg
Sales	80,224	73,909	8.5
Division sales	2004	2003	% chg
Chrysler Group	67,312	56,291	19.6
Mercedes Car Group	63,465	54,812	15.8
Commercial vehicles	44,233	30,712	44.0
Services	15,386	13,693	12.4
Other	1,923	211	811.4

Headquarters

DaimlerChrysler/225 Epplestrasse, 70546 Stuttgart, Germany
/Phone: 49-711-17-0.

DaimlerChrysler/1000 Chrysler Dr., Auburn Hills, Mich. 48326-2766/Phone: (248) 576-5741.

Personnel, brands, agencies

Corporate: Juergen E. Schrempp, chmn; Dieter Zetsche, pres & CEO; Chrysler Group: Joe Eberhardt, exec VP-global sls, mktg & svcs; George Murphy, sr VP-global brand mktg; Gary Dilts, sr VP-sls; Christine MacKenzie, VP-corp mkt rsch; Bonita Stewart, dir-interactive comms; David Rooney, dir-media opers & cross brand mktg; Jason Vines, VP-Chrysler Group comms; Julie Roehm, dir-mktg comms.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — corporate, DaimlerChrysler svcs, fleet, Mopar parts.

PHD Detroit, Troy, Mich. Michael O'Malley, pres. — media svcs.

George P. Johnson Co., Auburn Hills, Mich. Robert G. Vallee, Jr., CEO. — event mktg.

GlobalHue, Southfield, Mich. Allen Pugh, exec VP & dir-client svcs. — multicultural adv.

Chrysler Division: 1000 Chrysler Dr., CIMS 485-05-10, Auburn Hills, Mich. 48326-2766/Phone: (248) 512-2297. Jeffrey Bell, VP-Chrysler/Jeep mktg; Ann Fandozzi, dir-Chrysler mktg & family vehicle prod plng; John Sloan, dir-Chrysler car mktg & premium vehicle prod plng; Jay B. Kuhnle, dir-Chrysler/Jeep brand comms.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — Chrysler vehicles.

PHD Detroit, Troy, Mich. Michael O'Malley, pres. — media svcs.

GlobalHue, Southfield, Mich. Allen Pugh, exec VP & dir-client svcs. — multicultural adv.

Organic, Detroit. Chuck Russo, VP & mg dir. — interactive mktg.

Dodge Division: 1000 Chrysler Dr., CIMS 485-05-08, Auburn Hills, Mich. 48326-2766/Phone: (248) 512-0344. Darryl Jackson, VP-Dodge mktg; Joe Veltri, dir-Dodge truck mktg & prod plng; Pamela Niekamp, sr mgr-commercial vehicle mktg & prod plng; Fred Diaz, dir-Dodge comms.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — Dodge vehicles.

PHD Detroit, Troy, Mich. Michael O'Malley, pres. — media svcs.

GlobalHue, Southfield, Mich. Carl Izzi, sr VP & grp acct dir. — multicultural adv.

Organic, Detroit. Chuck Russo, VP & mg dir. — interactive mktg.

Jeep Division: 1000 Chrysler Dr., CIMS 485-05-58, Auburn Hills, Mich. 48326-2766/Phone: (248) 512-2297. Jeffrey Bell, VP-

Chrysler/Jeep mktg; John Plecha, dir-Jeep mktg & activity vehicle prod plng; Jay B. Kuhnle, dir-Chrysler/Jeep brand comms.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — Jeep vehicles.

PHD Detroit, Troy, Mich. Michael O'Malley, pres. — media svcs.

GlobalHue, Southfield, Mich. Carl Izzi, sr VP & grp acct dir. — multicultural adv.

Organic, Detroit. Chuck Russo, VP & mg dir. — interactive mktg.

Mercedes-Benz USA: One Mercedes Dr., Montvale, N.J. 07645/Phone: (201) 573-0600. Paul Halata, pres & CEO; Keith May, sr VP-sls opers; Michelle Cervantez, VP-mktg; Carol Goll, gm-brand experience mktg.

Merkley & Partners, New York. Alex Gellert, ptnr & CEO. — Mercedes-Benz vehicles.

BBDO Detroit, Troy, Mich. Joe Garcia, pres. — Mercedes-Benz parts & service.

PHD, New York. Lee Wilson, sr VP & dir-Mercedes-Benz. — media buying.

Critical Mass, Chicago. Scott Shamberg, acct dir. — interactive mktg.

Footsteps, New York. Daniell Austen, grp acct dir. — African-American adv.

48 Dell

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$54,965	\$41,094	33.8
Sunday magazine	83,601	78,452	6.6
B2B magazine	18,014	30,268	-40.5
Spanish-language magazine	31	124	-75.0
Newspaper	61,446	46,572	31.9
National newspaper	53,070	34,765	52.7
Spanish-language newspaper	18	14	28.6
Network TV	24,897	39,304	-36.7
Spot TV	5,032	6,782	-25.8
Syndicated TV	759	3,440	-77.9
Cable TV network	187,439	129,031	45.3
Network radio	12,240	2,211	453.6
National spot radio	2,503	3,085	-18.9
Outdoor	1,528	636	140.3
Internet	119,507	79,729	49.9
Measured media	625,050	495,507	26.1
Unmeasured media	131,100	174,097	-24.7
Total	756,150	669,604	12.9
By brand	2004	2003	% chg
Dell Computers	625,050	495,507	26.1

Sales & earnings (\$ in millions)

Worldwide	2005	2004	% chg
Sales	\$49,205	\$41,444	18.7
Earnings	3,043	2,645	15.0
U.S.	2005	2004	% chg
Sales	30,338	26,510	14.4

Headquarters

Dell/1 Dell Way, Round Rock, Texas 78682-2222/Phone: (512) 338-4400.

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Personnel, brands, agencies

Corporate: Michael S. Dell, chmn; Kevin B. Rollins, pres & CEO; Michael A. George, chief mktg officer & VP-U.S. cons bus; Claire Bennett, dir-cons electronics mktg.

DDB Worldwide Communications, Chicago. Greg Taucher, ww acct dir; Patti Winegar, grp bus dir.

Prometheus Media Services, Chicago. Robert Habeck, sr VP & grp media dir; Susan Morgenstein (New York), acct exec. — media svcs.

Critical Mass, Calgary. Carla Marcyniuk, acct exec. — interactive mktg.

Fogarty Klein Monroe, Houston. Steve Speier, exec VP & acct dir; Alycia Watts, VP & mgmt super. — direct mktg, interactive mktg.

Matlock Advertising & Public Relations, Atlanta. Sandra Waite, acct lead. African-American adv.

Tocquigny, Austin, Texas. Yvonne Tocquigny, CEO; Denise Waid, creative dir. — interactive mktg.

60 Deutsche Telekom

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$21,990	\$10,320	113.1
B2B magazine	.491	563	-12.8
Newspaper	.126,965	118,412	7.2
National newspaper	.23,387	14,832	57.7
Spanish-language newspaper	.577	616	-6.3
Network TV	.97,511	98,103	-0.6
Spot TV	.47,516	24,439	94.4
Syndicated TV	.28,166	7,443	278.4
Cable TV network	.49,723	39,750	25.1
Spanish-language TV	.16,810	15,038	11.8
Network radio	.351	NA	NA
National spot radio	.4,967	8,991	-44.8
Outdoor	.175	2,512	-93.0
Internet	.21,998	12,455	76.6
Yellow Pages	.4,639	5,172	-10.3
Measured media	.445,266	358,646	24.2
Unmeasured media	.158,332	133,882	18.3
Total	.603,598	492,528	22.6
By brand	2004	2003	% chg
T-Mobile	.440,534	349,562	26.0

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$72,290	\$63,729	13.4
Earnings	.5,745	1,484	287.1
North America	2004	2003	% chg
Sales	11,730	8,686	35.0
Division sales	2004	2003	% chg
T-Com	.30,281	28,666	5.6
T-Mobile	.30,085	24,621	22.2
T-Systems	.9,040	8,199	10.3
T-Online	.2,239	1,897	18.0

Headquarters

Deutsche Telekom/Friedrich-Ebert-Allee 140, Bonn, Germany 53113/Phone: 49-228-181-0.

Deutsche Telekom/280 Park Ave., 26th Fl., New York, N.Y. 10017/Phone: (212) 424-2196.

Personnel, brands, agencies

Corporate: Kai Uwe Ricke, CEO.

T-Mobile: 12920 SE 38th St., Bellevue, Wash. 98006/Phone: (800) 218-9270. Robert Dotson, pres & CEO; Mike Butler, chief mktg officer; Jim Goodwin, VP-integrated mktg.

Publicis in the West, Seattle. Scott Foreman, exec VP & grp mg dir. — T-Mobile wireless services.

Optimedia International U.S., New York. Keith Mackay, sr VP-strategic comms dir. — media svcs.

Conill, Torrance, Calif. Carlos Martinez, gm. — Hispanic adv.

61 Diageo

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$56,976	\$75,739	-24.8
Sunday magazine	.NA	33	NA
B2B magazine	.628	927	-32.3
Local magazine	.750	769	-2.5
Spanish-language magazine	.396	192	106.3
Newspaper	.2,469	1,788	38.1
National newspaper	.1,027	679	51.3
Spanish-language newspaper	.139	167	-16.8
FSI	.80	NA	NA
Network TV	.12,483	29,351	-57.5
Spot TV	.3,719	9,133	-59.3
Syndicated TV	.605	4,075	-85.2
Cable TV network	.57,200	42,250	35.4
Spanish-language TV	.NA	2,263	NA
Network radio	.NA	426	NA
National spot radio	.5,637	8,939	-36.9
Outdoor	.20,818	19,590	6.3
Internet	.584	4,723	-87.6
Measured media	.163,511	201,044	-18.7
Unmeasured media	.429,951	427,216	0.6
Total	.593,462	628,260	-5.5

By brand	2004	2003	% chg
Smirnoff	.27,021	53,482	-49.5
Crown Royal	.17,619	27,526	-36.0
Guinness	.17,448	17,605	-0.9
Captain Morgan	.16,996	22,101	-23.1
Diageo	.15,287	9,232	65.6
Jose Cuervo	.14,645	14,332	2.2
Johnnie Walker	.10,418	9,890	5.3
Baileys Irish Cream	.10,180	13,650	-25.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$16,351	\$14,479	12.9
Earnings	.2,560	82	3022.0
North America	2004	2003	% chg
Sales	.4,967	5,136	-3.3
Operating profit	.1,251	1,138	9.9
Division sales	2004	2003	% chg
Premium drinks	.16,351	14,742	10.9

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Headquarters

Diageo/8 Henrietta Place, London, United Kingdom
WIMgAG/Phone: 44-20-7927-5200.

Diageo/6 Landmark Sq., Stamford, Conn. 06901/Phone: (203) 359-7100.

Personnel, brands, agencies

Corporate: Lord James Blyth of Rowington, chmn; Paul Walsh, CEO; Rob Malcolm, pres-global mktg, sls & innovation.

Leo Burnett Worldwide, Chicago. Jim Wisman, exec VP & account dir; Clive Sirkin, grp mg dir, Leo Burnett Worldwide. — new prods.

Diageo North America: 6 Landmark Sq., Stamford, Conn. 06901/Phone: (203) 359-7100. Ivan Menezes, pres & CEO; Debra Kelly-Ennis, exec VP-cons strategy & mktg.

Arnell Group, New York. Miles Kellam, acct dir. — Jose Cuervo.
Bartle Bogle Hegarty, New York. Erin Riley, acct dir; Tina Wang, acct dir. — Bailey, Johnnie Walker.

BBDO Worldwide, New York. Peter Sherman, sr VP & sr acct dir. — Guinness, Harp, Red Stripe, Smithwicks.

Bezos/Nathanson Marketing Group, New York. Mark Bezos, CEO; David Nathanson, chief creative.

Butler, Shine, Stern & Partners, Sausalito, Calif. Greg Stern, pres. — Barton & Guestier, Beaulieu Vineyard, Sterling Vineyards.

Euro RSCG 4D, New York. Andy Wright, acct dir. — mktg svcs, Premium liquors.

Grey Worldwide, New York. Tim Nicholls, exec VP & dir-global svcs. — Captain Morgan, Crown Royal Canadian Whiskey, Parrot Bay, Seagram 7, Tanqueray, VO Canadian Whiskey.

JWT, New York. Howard Portrate, global bus dir. — Smirnoff Blue Label, Smirnoff Norsk, Smirnoff Penka, Smirnoff Red Label, Smirnoff Signatures, Smirnoff Twist.

Laird & Partners, New York. Trey Laird, pres & exec creative dir. — Ciroc, Tanqueray.

Manhattan Marketing Ensemble, New York. Emily Stern, acct exec. — Guinness Extra Stout.

MediaCom, New York. Jim Porcarelli, exec VP & chief mktg officer. — media svcs, BV Wines, Baileys, Captain Morgan, Ciroc, Crown Royal, Don Julio, Goldschlager, Guinness, Johnnie Walker, Jose Cuervo, Parrot Bay, Red Stripe, Seagram 7, Smirnoff Portfolio, Talisker, Tanqueray, VO.

atmosphereBBDO, New York. Andreas Combuechen, CEO & chief creative officer. — interactive mktg, Red Stripe Beer.

BFG Communications, Stamford, Conn. Kevin Meany, pres. — sls promo, Baileys, Captain Morgan, Godiva, Rumble Minze, Romana Sambuca.

Colangelo Synergy Marketing, Darien, Conn. Jim Kemppland, VP & acct dir. — promo mktg, beers, N. Amer. whiskey, Smirnoff.

Dieste, Harmel & Partners, Dallas. Bill Cashman, acct dir. — Hispanic adv, Jose Cuervo Especial, Jose Cuervo Tradicional.

GEM Group, Minneapolis. Tip Nunn, acct exec. — event execution, Crown Royal.

Spike DDB, New York. Dana Wade, pres. — multicultural adv, Tanqueray.

Vidal Partnership, New York. Manny Vidal, CEO; Roberto Ruiz, ptnr. — Hispanic adv, Johnnie Walker.

US Concepts, New York. Bob Bernstein, exec VP. — on premise activation, all brands.

WING Latino, New York. Jackie Bird, pres. — Hispanic adv, integrated mktg comms, Crown Royal, Smirnoff Ice, Captain Morgan, Jose Cuervo.

8 Walt Disney Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$136,553	\$123,434	10.6
Sunday magazine	20,740	8,235	151.9
B2B magazine	24,030	27,447	-12.4
Local magazine	429	764	-43.8
Spanish-language magazine	189	361	-47.6
Newspaper	201,673	237,843	-15.2
National newspaper	54,117	66,914	-19.1
Spanish-language newspaper	2,446	1,451	68.6
FSI	256	369	-30.6
Network TV	417,600	409,736	1.9
Spot TV	131,539	154,837	-15.0
Syndicated TV	42,109	56,038	-24.9
Cable TV network	194,300	168,339	15.4
Spanish-language TV	23,200	20,373	13.9
Network radio	13,312	15,101	-11.8
National spot radio	34,589	40,548	-14.7
Outdoor	39,659	28,466	39.3
Internet	53,264	44,613	19.4
Measured media	1,390,005	1,404,869	-1.1
Unmeasured media	851,527	630,637	35.0
Total	2,241,532	2,035,506	10.1

By brand	2004	2003	% chg
Buena Vista movies	506,327	447,599	13.1
Walt Disney videos	307,284	303,288	1.3
Walt Disney	175,947	168,961	4.1
Miramax movies	166,329	275,491	-39.6
ABC	109,780	100,384	9.4
ESPN	71,215	58,426	21.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$30,752	\$27,061	13.6
Earnings	2,345	1,267	85.1
North America	2004	2003	% chg
Sales	24,012	22,124	8.5
Operating Income	2,934	2,113	38.9
Division sales	2004	2003	% chg
Media Networks	11,778	10,941	7.7
Studio Entertainment	8,713	7,364	18.3
Parks & Resorts	7,750	6,412	20.9
Consumer Products	2,511	2,344	7.1

Headquarters

Walt Disney Co./500 S. Buena Vista St., Burbank, Calif.
91521/Phone: (818) 560-1000.

Notes

Robert Iger was named CEO in mid-March 2005, effective Sept. 30 when Michael Eisner, current CEO, steps down a year ahead of schedule. Mr. Iger, current president at Disney, was the favorite of Mr. Eisner for the post. He was formerly head of ABC.

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Personnel, brands, agencies

Corporate: Michael D. Eisner, CEO; Robert A. Iger, CEO designate & current pres & chief operating officer.

Leo Burnett Worldwide, Chicago. Jim Tracy, exec VP & acct dir.
Starcom USA, Chicago. Kathy Ring, exec VP & grp client leader. — media svcs.

A&E Television Networks (joint venture of ABC, Hearst & NBC): 235 E. 45th St., New York, N.Y. 10017/Phone: (212) 210-1400. Abbe Raven, pres & CEO; Artie Scheff, sr VP-mktg; Lori Peterzell, VP-adv; Robert DeBitetto, exec VP & gm.

TBWA Worldwide, New York. Nicole Minore, grp acct dir; Ritu Sharma, acct dir.

Pere Partnership, New York. Steve Keltz, sr VP-client svcs.

Horizon Media, New York. Ruby Gottlieb, sr VP & dir-plng affiliated media svcs; Greg Fein, acct super; Erica Hunter, sr VP & acct grp head; Eric Blankfein, VP & dir-media plng. — media svcs.

ABC: 77 W. 66th St., New York, N.Y. 10023/Phone: (212) 456-7777. Anne Sweeney, co-chmn Disney Media Networks & pres-ABC Television; Stephen McPherson, pres-ABC Primetime Entertainment; Alex Wallau, pres-ABC network ops & admin; Mike Benson, sr VP-mktg; Marla Provencio, sr VP-mktg; Mike Shaw, pres-sls & mktg; Dan Longest, sr VP-integrated mktg & promo; Valerie McMichael, VP-mktg & promo, ABC Daytime; Cynthia Vannoy, VP-adv & promo, ABC Sports; Alan Ives, VP & creative dir-adv & promo.

BLT & Associates, Los Angeles. Clive Baillie, pres & CEO; Andi Delott, acct dir. — print creative, ABC Entertainment.

DCODE, New York. Jonathan Paley, mg dir; Matt Steinwald, art dir & acct super; J.P. Allas, acct exec. — ABC Sports.

J. Brown, Stamford, Conn. Sarah Davis, acct exec. — ABC News.

OMD Worldwide, Los Angeles. Susie Vye, acct exec. — ABC Entertainment (media svcs), ABC News (media buying).

ABC Cable Networks Group: 3800 W. Alameda, Burbank, Calif. 91505/Phone: (818) 569-7500. Anne Sweeney, co-chmn Disney Media Networks & pres-ABC Television; Rich Ross, pres-Disney Channel Worldwide; Paul Lee, pres-ABC Family; Deborah Blackwell, sr VP & gm-SOAPnet; Eleo Hensleigh, chief mktg officer & exec VP-mktg, brand strategies-Disney-ABC Television Group; Adam Sanderson, sr VP-brand mktg; John Rood, sr VP-brand mktg; Matthew Palmer, sr VP mktg-Disney Channel; Sherri York, VP mktg-SOAPnet; Heidi Lobel, sr VP-network sls-ABC Daytime & SOAPnet; Tricia Wilber, sr VP-adv sls & promo; Laura Nathanson, exec VP-adv sls & promo-ABC Family; Kerry J. Hughes, VP-adv sls & promo-ABC Kids.

OMD Worldwide, Los Angeles. Susie Vye, acct exec. — media svcs, ABC Family.

ABC Radio Networks: 13725 Montfort Dr, Dallas, Texas 75240/Phone: (972) 991-9200. Darryl Brown, exec VP & gm; Jim Robinson, pres.

In-house. — media svcs.

Buena Vista Television: 500 S. Buena Vista St., Burbank, Calif. 91521/Phone: (818) 560-1000. Sal Sardo, exec VP-mktg; Sandra

Brewer, VP-affiliate relations & media; Blake Bryant, VP-creative svcs; Kim Harbin, VP-publicity; Jennie Born, VP-natl promo.

In-house. Jimmy Lee, VP-print adv.

Disney Consumer Products: 500 S. Buena Vista St., Burbank, Calif. 91521/Phone: (818) 560-1000. Andy Mooney, chmn-Disney cons prods; Deborah Dugan, pres-Disney Publishing ww; Russell Hampton, Jr., sr VP & gm-Baby Einstein Co.; Graham Hopper, sr VP & gm-Buena Vista Games; Jessica Dunne, exec VP-Global Toys; Harry Dolman, exec VP-Global Hardlines; Jim Calhoun, exec VP-Global Apparel.

No agency.

ESPN: 77 W. 66th St., New York, NY 10023/Phone: (212) 456-7777. George Bodenheimer, pres; Lee Ann Daly, exec VP-mktg; Aaron Taylor, VP-mktg; Sharon Otterman, VP-media strategies; Heather Campbell, VP-synergy & brand mgmt.

Concept Group, St. Paul, Minn. Griffin Stenger, co-creative dir; Gregg Wasiak, co-creative dir. — ESPN.

Ground Zero, Los Angeles. Jim Smith, mg ptrn; Court Crandall, creative ptrn. — ESPN.

Wieden & Kennedy, New York. Rich Weinstein, acct dir; Ty Monague, co-creative dir; Todd Woodbury, co-creative dir. — ESPN.

Hyperion Publishing: 77 W. 66th St., 11th Fl., New York, N.Y. 10023/Phone: (212) 456-7777. Bob Miller, pres; Ellen Archer, publisher; Jane Comins, dir-mktg; Jessica Wiener, asst dir-adv & promo; Children's Books: Deborah Dugan, pres; Ann Diebel, art dir-children's books.

Spier NY/Lord Group, New York. Bethany Chamberlain, pres & CEO; Lori Hnatov, mgmt super; Karen Henry, sr acct exec. — Hyperion.

Lifetime Entertainment Services (Walt Disney & Hearst joint venture): 309 W. 49th St., New York, N.Y. 10019/Phone: (212) 424-7000. Betty Cohen, pres & CEO; Rick Haskins, exec VP & gm; Lynn Picard, exec VP & gm; Tom Hanft, sr VP-mktg, adv & promo; Gerry Logue, sr VP & exec creative dir; Catherine Moran, VP-mktg.

In-house.

Walt Disney Internet Group: 500 S. Buena Vista St., Burbank, Calif. 91521/Phone: (818) 623-3200. Steve Wadsworth, pres; Ken Goldstein, exec VP & mg dir-Disney Online; Joanne Erickson, mktg dir-Disney Online; Petrina McPhee, mktg dir-subscription prods; Dan Sherlock, VP-Movies.com; Maureen Bergmueller, mktg dir-FamilyFun.com.

In-house.

Walt Disney Parks & Resorts: P.O. Box 10000, Lake Buena Vista, Fla. 32830/Phone: (407) 824-2222. Al Weiss, pres; Linda Warren, exec VP-mktg & brand mgmt, Walt Disney World Resort; Bryan Wittman, VP-project devel & special events-Disneyland.

Leo Burnett Worldwide, Chicago. Jim Tracy, exec VP & acct dir.

Arc Worldwide, Chicago. Ben Gladstone, acct dir. —direct response & interactive branding.

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Walt Disney Studios: 500 S. Buena Vista St., Burbank, Calif. 91521/Phone: (818) 560-1000. Dick Cook, chmn; Buena Vista Motion Pictures Group: Nina Jacobson, pres; Buena Vista Pictures Marketing: Oren Aviv, pres; Brett Dicker, exec VP; Kristy Frudenberg, sr VP-media; John Sabel, sr VP-creative print svcs; Dennis Rice, sr VP-publicity; Buena Vista International: Mark Zoradi, pres; Nic Crawley, sr VP-mktg; Teri Meyer, sr VP-publicity; Ticole Richards, VP-mktg & Creative Film Svcs; Mari Gastineau, VP-mktg & Creative Film Svcs; Donald Evans, VP-mktg & promo; Buena Vista Home Entertainment: Robert Chapek, pres; Patrick Fitzgerald, exec VP-sls & distribution; Kristy Frudenberg, sr VP-adv; Gordon Ho, sr VP-brand mktg; Dana Lombardo, sr VP-mktg rsch; Andy Siditsky, sr VP-ww mktg svcs & DVD prod; Lori MacPherson, VP-brand mktg; Jim Bowman, VP-rsch; Buena Vista Home Entertainment International: Mark Zoradi, pres; Dennis Maguire, pres; Chris Brown, VP-mktg; Joel Binder, VP-pr; Buena Vista Music Group: Bob Cavallo, CEO; Chris Montan, pres; David Agnew, exec VP & gm; Robert Marick, sr VP & gm-Hollywood Records; Abbey Knowlton, sr VP & gm-Hollywood Records; Randy Goodman, pres-Lyric Street Records; Buena Vista Theatrical Group: Thomas Schumacher, pres; Heather Eppe, VP-mktg & adv; Miramax: Harvey Weinstein, co-chmn; Bob Weinstein, co-chmn; Jason Cassidy, exec VP-mktg; Lori Sale, exec VP-ww promo; Walt Disney Feature Animation: David Stainton, pres; Fred Tio, exec VP.

Serino Coyne, New York. Nancy Coyne, CEO. — Disney Theatrical Productions.

Allied Advertising Agency, Boston. Gerald Feldman, pres. — media buying, Buena Vista Motion Pictures.

Moroch Partners, Dallas. Thomas F. Moroch, chmn; Patrick Kempf, CEO. — media svcs, Buena Vista Motion Pictures, Miramax.

Nemer Fieger, Minneapolis. James Fieger, pres & CEO. — media buying, Buena Vista Motion Pictures.

Palisades Media Group, Santa Monica, Calif. Roger A. Schaffner, pres. — media buying, Miramax.

Solomon Friedman Advertising, Bloomfield Hills, Mich. Dean A. Friedman, pres. — media svcs.

Starcom USA, Chicago. Kathy Ring, exec VP & grp client leader. — media svcs.

80 Doctor's Associates

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$5,401	\$198	NA
B2B magazine	13	111	-88.3
Newspaper	561	715	-21.5
National newspaper	782	409	91.2
Spanish-language newspaper	32	8	300.0
FSI	1,116	647	72.5
Network TV	140,371	127,444	10.1
Spot TV	93,334	86,994	7.3
Syndicated TV	26,647	17,391	53.2
Cable TV network	26,947	23,854	13.0
Spanish-language TV	6,582	7,274	-9.5
Network radio	250	NA	NA

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
National spot radio	1,600	164	875.6
Outdoor	3,737	2,495	49.8
Internet	3,962	2,962	33.8
Measured media	311,335	270,666	15.0
Unmeasured media	151,677	139,044	9.1
Total	463,012	409,710	13.0
By brand	2004	2003	% chg
Subway restaurants	310,217	270,020	14.9

Sales & earnings (\$ in millions)

U.S.	2004	2003	% chg
Sales*	\$6,270	\$5,700	10.0

Headquarters

Doctor's Associates/325 Bic Dr., Milford, Conn. 06460/Phone: (203) 877-4281.

Notes

*Financial returns for Doctor's Associates are from Technomic and are systemwide.

Personnel, brands, agencies

Corporate: Peter Buck, chmn; Frederick DeLuca, pres & CEO; Bill Schettini, chief mktg officer; Mildred Shinn, VP.

Subway Franchisee Advertising Fund Trust: 325 Bic Dr., Milford, Conn. 06460/Phone: (203) 877-4281. Jeff Offutt, chmn; Tom Seddon, CEO & exec dir; Chris Carroll, mktg dir; Ted Wirth, mgr-adv & creative svcs.

Goodby, Silverstein & Partners, San Francisco. Robert Riccardi, ptrn & dir-acct mgmt. Subway.

Fleishman-Hillard, New York. Heidi Hovland, sr VP & sr ptrn-mktg comms. — pr, Subway.

La Comunidad, Miami. Gary Bassel, pres; Jose Molla, creative dir; Caroline Wu, acct super. — Hispanic adv, Subway.

MediaCom, New York. Michele Krumper, sr VP & grp dir. — media svcs, Subway.

MMB, Boston. Joe McCarthy, CEO; Fred Bertino, pres & creative dir; Jamie Mambro, creative dir. — special projects, Subway.

Ryan Partnership, Westport, Conn. Paul Kramer, pres; Paulina Connolly, VP-creative svcs; Lydia Kennedy, sr prog mgr. — merchandising, Subway.

90 DreamWorks SKG

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$5,553	\$3,093	79.5
Sunday magazine	334	74	351.4
B2B magazine	3,760	4,953	-24.1
Local magazine	19	19	0.0
Newspaper	61,272	30,302	102.2
National newspaper	18,611	10,737	73.3
Spanish-language newspaper	215	122	76.2
FSI	2,600	222	NA
Network TV	129,404	68,496	88.9

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Spot TV	23,437	13,856	69.1
Syndicated TV	17,232	4,110	319.3
Cable TV network	38,032	14,090	169.9
Spanish-language TV	NA	243	NA
Network radio	321	271	18.5
National spot radio	206	48	329.2
Outdoor	11,511	4,647	147.7
Internet	5,503	198	NA
Measured media	318,010	155,481	104.5
Unmeasured media	62,003	29,351	111.2
Total	380,013	184,832	105.6
By brand	2004	2003	% chg
Dreamworks movies	265,651	128,563	106.6
Dreamworks videos	47,562	24,607	93.3

Headquarters

DreamWorks SKG, 1000 Flower St., Glendale, Calif. 91201/Phone: (818) 695-5000.

Personnel, brands, agencies

Corporate: Steven Spielberg, principal; Jeffrey Katzenberg, principal; David Geffen, principal; Terry Press, head-mktg; Amy Gruberg, head-media, motion pictures & home video.

In-house.

GSD&M, Chicago & Austin, Texas. Justin Poe, acct dir. — media buying, natl broadcast.

49 Federated Department Stores

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$27,364	\$27,521	-0.6
Sunday magazine	2,345	1,774	32.2
B2B magazine	277	117	136.8
Local magazine	1,375	891	54.3
Spanish-language magazine	140	122	14.8
Newspaper	424,999	458,156	-7.2
National newspaper	49,571	43,237	14.6
Spanish-language newspaper	1,983	2,417	-18.0
Spot TV	89,899	80,195	12.1
Cable TV network	4	NA	NA
National spot radio	3,643	3,614	0.8
Outdoor	2,285	1,851	23.4
Internet	13,718	15,528	-11.7
Measured media	617,603	635,423	-2.8
Unmeasured media	126,497	94,425	34.0
Total	744,100	729,848	2.0
By brand	2004	2003	% chg
Macy's	530,465	551,123	-3.7
Bloomingdales	80,090	73,229	9.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$15,630	\$15,264	2.4
Earnings	689	693	-0.6

U.S.	2004	2003	% chg
Sales	15,630	15,264	2.4
Operating income	1,400	1,341	4.4

Headquarters

Federated Department Stores/7 W. Seventh St., Cincinnati, Ohio 45202/Phone: (513) 579-7000.

Notes

In February 2005, Federated struck a deal with May Department Stores to buy out May for \$17 billion, a figure including the assumption of \$6 billion in debt. The deal, paid equally in stock and cash, balloons Federated stores to 951 with sales of \$30 billion, passing Sears as the No. 1 U.S. department store company. Federated expects few store closings in the deal. The merger is expected to close in third quarter 2005.

Personnel, brands, agencies

Corporate: Terry Lundgren, chmn, pres & CEO.

Bloomingdale's: 1000 Third Ave., New York, N.Y. 10022/Phone: (212) 705-2000. Michael Gould, chmn & CEO; Tony Spring, exec VP-mktg; John Funck, sr VP-creative.

In-house.

Macy's Central: 223 Perimeter Center Pkwy., Atlanta, Ga. 30346/Phone: (770) 913-4000. Edwin Holman, chmn & CEO; Michael Krauter, pres & chief merch officer; Diann Mahood, exec VP-mktg; Steve Weinbaum, dir-adv plng; Susan Hancock, div VP-special events; Robin Gagnon, VP-strategic mktg; Karen Martin, div VP-adv; Steven Cohen, div VP & dir-creative; Mark Walsh, dir-strategic alliances.

Lowe Worldwide, New York. Alex Gatti, sr VP & acct dir.

In-house.

Initiative Media Worldwide, Atlanta. Rob Claxton, exec VP & gm. — media buying.

Macy's East: 151 W. 34th St., New York, N.Y. 10001/Phone: (212) 695-4400. Ronald Klein, chmn & CEO; James Gray, pres & chief operating officer; Martine Reardon, exec VP-mktg.

Lowe Worldwide, New York. Alex Gatti, sr VP & acct dir.

In-house.

Macy's Florida: 22 E. Flagler St., Miami, Fla. 33131/Phone: (305) 835-5151. Tim Adams, chmn & CEO; Lisa Kauffman, sr VP-mktg; Gilbert Lorenzo, VP-adv; Ron Rodriguez, VP-special events & publicity; Richard Todaro, VP-creative.

Lowe Worldwide, New York. Alex Gatti, sr VP & acct dir.

In-house.

Macy's Home Store: 151 W. 34th St., New York, N.Y. 10001/Phone: 212-695-4400. Eric Salus, pres; Susan Mesec, sr VP-mktg; Ed Little, VP-creative.

Lowe Worldwide, New York. Alex Gatti, sr VP & acct dir.

In-house.

Macy's Northwest: Third Ave. & Pine St., Seattle, Wash. 98181/Phone: (206) 344-2121. Dan Edelman, chmn & CEO; Jack Arndt, sr VP-mktg & sls promo; Mark Gordon, photo studio dir;

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Brent Frerichs, VP-media svcs & analysis; Sue Sleeth, media plng mgr; Val Walser, VP-adv prods & opers; Mary Jean Stephens, div VP-special events & pr.

Lowe Worldwide, New York. Alen Gatti, sr VP & acct dir.
In-house.

Macy's West: 50 O'Farrell St., San Francisco, Calif. 94120/Phone: (415)397-3333. Robert Mettler, pres; Sheila Field, sr VP-mktg & sls promo; Jane McGinnis, VP-adv finance; Sally Cohen, VP-sls promo; Stacey Osborn, VP-adv & promo; Alexandra Robinson, dir-direct mail media; Jane Kelley, dir-bdcast media; LaTonya Lawson, dir-new media; Brian Weart, dir-acct execs; Pat Holt, dir-ROP creative.

Lowe Worldwide, New York. Alex Gatti, sr VP & acct dir.
In-house.

7 Ford Motor Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$369,361	\$281,150	31.4
Sunday magazine	11,237	4,285	162.2
B2B magazine	8,132	6,973	16.6
Local magazine	1,213	1,618	-25.0
Spanish-language magazine ..	5,147	8,697	-40.8
Newspaper	126,340	140,894	-10.3
National newspaper	51,872	45,424	14.2
Spanish-language newspaper ..	1,307	376	247.6
Network TV	497,598	449,614	10.7
Spot TV	285,447	277,790	2.8
Syndicated TV	15,401	12,036	28.0
Cable TV network	115,880	104,559	10.8
Spanish-language TV	27,766	26,115	6.3
Network radio	20,245	23,812	-15.0
National spot radio	6,390	8,402	-23.9
Outdoor	17,771	10,467	69.8
Internet	61,193	24,982	144.9
Yellow Pages	20,975	21,663	-3.2
Measured media	1,643,275	1,448,857	13.4
Unmeasured media	814,754	758,152	7.5
Total	2,458,029	2,207,009	11.4
By brand	2004	2003	% chg
Ford	948,036	855,146	10.9
Mercury	141,680	47,698	197.0
Lincoln	98,930	144,403	-31.5
Jaguar	98,592	88,389	11.5
Lincoln Mercury	90,520	83,691	8.2
Hertz	83,421	57,807	44.3
Land Rover	71,541	59,836	19.6
Volvo	65,493	56,750	15.4
Quality Care Parts & Service ..	13,461	27,747	-51.5

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$171,600	\$164,300	4.4
Earnings	3,500	500	600.0
U.S.	2004	2003	% chg
Sales	100,208	103,482	-3.2

Division sales	2004	2003	% chg
Automotive	147,100	138,200	6.4
Financial Services	24,500	26,100	-6.1

Headquarters

Ford Motor Co./World Headquarters, One American Rd., Dearborn, Mich. 48126/Phone: (313) 322-3000.

Personnel, brands, agencies

Corporate: William Clay Ford, Jr., chmn & CEO; James J. Padilla, pres & chief operating officer; Mark Fields, exec VP-Ford Europe & Premier Automotive Group; Stephen G. Lyons, grp VP-N. Amer. mktg, sls & svc.

Ogilvy & Mather Worldwide, Detroit. Jan Starr, exec VP & mg dir.

Y&R, Detroit. Don Williams, mg ptrn. — Ford Motor Credit.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

Beanstalk Group, New York. Seth M. Siegel, exec VP & chmn-licensing. — licensing.

PanCom, Los Angeles. Young M. Kim, chmn & CEO. — Asian-American adv.

UniWorld Group, Detroit & Irvine, Calif. Chuck Morrison, exec VP & gm; Steve Goodman, dir-media svcs. — African-American & urban adv, promo & media svcs.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP. — Hispanic adv & media buying.

Aston Martin North America: One Premier Place, Irvine, Calif. 92618-2922/Phone: (949) 341-6100. John Walton, VP & gm.

S3, Boonton, N.J. Denise Soltys, pres & acct dir. — Aston Martin vehicles.

Mediaedge:cia, Detroit. Charles Courtier, exec chmn ww; Jack Valente, mg ptrn. — media comms svcs.

Ford Customer Service Division: Regent Court Bldg., 16800 Executive Plaza Dr., Dearborn, Mich. 48126/Phone: (313) 322-3000. Francisco Codina, VP-Ford Motor Co. & pres-Ford Customer Service Division.

Ogilvy & Mather Worldwide, Detroit. Jan Starr, exec VP & mg dir. — Quality Care parts & service.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

Ford Division: Regent Court, 16800 Executive Plaza Dr., Dearborn, Mich. 48126/Phone: (313) 322-3000. Darryl B. Hazel, pres; Martin E. Collins, genl mktg mgr; Benjamin L. Poore, car grp mktg mgr; Douglas W. Scott, truck grp mktg mgr; Christine M. Feuell, SUV grp mktg mgr; Mary Lou Quesnell, mktg comms mgr.

JWT, Detroit. George Rogers, US acct dir; Tom Cordner, ww exec creative dir. — Ford vehicles.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

UniWorld Group, New York. James Malone, grp acct dir. — African-American adv & media svcs.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta,

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chief operating officer; Tim Swies, exec VP. — Hispanic adv & media buying.

Hertz Corp.: 225 Brae Blvd., Park Ridge, N.J. 07656/Phone: (201) 307-2000. Craig R. Koch, chmn & CEO; Brian J. Kennedy, exec VP-mktg & sls; Frank Camacho, staff VP-mktg, U.S. Rent-A-Car; Janet Smyth, div VP-mktg svcs.

DDB Worldwide Communications, New York. Nina Gramaglia, acct svcs dir. — Hertz vehicle rental.

Jaguar North America: One Premier Pl., Irvine, Calif. 92618/Phone: (949) 341-5800. Mike O'Driscoll, pres; CJ (Connell) O'Donnell, exec VP-sls & mktg; Gary Temple, VP-cust care; Tom Scarpello, VP-mktg; Jeffrey Tolerico, VP-retail opers; Panas Anastasios, VP-franchising; James Thomas, comms dir.

Euro RSCG/Fuel, New York. Dan McLoughlin, acct dir. — Jaguar vehicles.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

Mediaedge:cia, Irvine, Calif. Charles Courtier, exec chmn ww; Jack Valente, mg ptr. — media comms svcs.

Bravo Group, Miami. Mary Miqueli, VP & gm. — Hispanic strategy & media plng.

Global Beach, Irvine, Calif. Matt Passey, acct dir. — interactive mktg.

Landor, Irvine, Calif. Craig Branigan, CEO; Tara Stephens, client mg dir. — sls promo.

UniWorld Group, Irvine, Calif. Chuck Morrison, exec VP & gm. — African-American strategy & media buying.

Witeck Combs & Prime Access, Washington. Wesley Combs, pres. — gay, lesbian, bisexual & transgendered mktg.

Wunderman, Irvine, Calif. Dan Olson, VP & mg dir. — direct mktg.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP. — Hispanic media buying.

Land Rover North America: One Premier Place, Irvine, Calif. 92618/Phone: (949) 341-6100. Mike O'Driscoll, pres; Richard Beattie, exec VP-sls & mktg; Pat Ward, VP-retail; Gary Temple, VP-cust svc; Sally Eastwood, VP-mktg; Tim Watson, VP-comms.

Y&R, Irvine, Calif. Tom Steadman, brand team leader. — Land Rover vehicles.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

Mediaedge:cia, Irvine, Calif. Charles Courtier, exec chmn ww; Jack Valente, mg ptr. — media comms svcs.

A Team, Irvine, Calif. Andrew Cohen, CEO. — sls promo.

Bravo Group, Miami. Mary Miqueli, VP & gm. — Hispanic strategy & media plng.

UniWorld Group, Irvine, Calif. Chuck Morrison, exec VP & gm. — African-American strategy & media svcs.

Witeck Combs & Prime Access, Washington. Wesley Combs, pres. — Gay, lesbian, bisexual & transgendered mktg.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP. — Hispanic media buying.

Lincoln Mercury: Regent Court Bldg., 16800 Executive Plaza Dr., Dearborn, Mich. 48126/Phone: (313) 322-3000. Al Giombetti, pres; Randy Ortiz, genl sls mgr; John Fitzpatrick, genl mktg mgr; Tom Grill, mktg comms mgr.

Y&R, Irvine, Calif. Don Williams, mg ptr. — Lincoln vehicles, Mercury vehicles.

Ford Motor Media, Detroit. Kevin Brown, exec dir. — media buying.

Mediaedge:cia, Detroit. Charles Courtier, exec chmn ww; Jack Valente, mg ptr. — media comms svcs.

UniWorld Group, Detroit. Chuck Morrison, exec VP & gm; Ed Boyd, grp acct dir. — African-American adv, media buying, event promotion & PR.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP; Joe Castro, exec VP. — Hispanic adv & media buying.

Volvo Cars of North America: One Premier Place, Irvine, Calif. 92618/Phone: (949) 341-6500. Anne Belec, pres & CEO; Hans Krondahl, exec VP-mktg; Roger Ormisher, VP-public affairs; Linda Gangeri, natl adv mgr.

Euro RSCG Worldwide, New York & Irvine, Calif. Chris Ross, global acct dir. — Volvo vehicles.

MPG, New York. Christopher O'Conner, sr VP & grp acct dir. — media svcs.

Mediaedge:cia, Detroit. Charles Courtier, exec chmn ww; Jack Valente, mg ptr. — media comms svcs.

PanCom, Los Angeles. Young M. Kim, pres & CEO. — Asian-American adv.

Witeck Combs & Prime Access, Washington. Wesley Combs, pres. — Gay & lesbian mktg.

UniWorld Group, Irvine, Calif. Chuck Morrison, exec VP & gm; Steve Goodman, dir-media svcs. — African-American media buying.

Zubi Advertising Services, Coral Gables, Fla. Joe Zubizarreta, chief operating officer; Tim Swies, exec VP. — Hispanic media buying.

72 Gap Inc.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$78,021	\$56,315	38.5
Sunday magazine	5,341	4,767	12.0
B2B magazine	138	11	NA
Local magazine	24	25	-4.0
Newspaper	8,441	8,626	-2.1
National newspaper	7,379	6,179	19.4
Network TV	175,070	176,860	-1.0
Spot TV	2,377	11,983	-80.2
Syndicated TV	54,528	46,208	18.0
Cable TV network	37,407	33,410	12.0
Spanish-language TV	7,901	5,123	54.2
National spot radio	5,237	4,341	20.6
Outdoor	6,552	9,412	-30.4
Internet	16,074	21,383	-24.8
Measured media	404,490	384,643	5.2
Unmeasured media	121,031	121,466	-0.4
Total	525,521	506,109	3.8

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By brand	2004	2003	% chg
Old Navy	192,122	191,286	0.4
Gap	165,549	151,688	9.1
Banana Republic	46,820	41,668	12.4

Sales & earnings (\$ in millions)

Worldwide	2005	2004	% chg
Sales	\$16,267	\$15,854	2.6
Earnings	1,150	1,031	11.5
North America	2005	2004	% chg
Sales	14,199	13,837	2.6
Division sales	2005	2004	% chg
Gap	7,240	7,305	-0.9
Old Navy	6,747	6,456	4.5
Banana Republic	2,269	2,090	8.6
Other	11	3	266.7

Headquarters

Gap Inc./2 Folsom St., San Francisco, Calif. 94105/Phone: (650) 952-4400.

Personnel, brands, agencies

Corporate: Robert Fisher, chmn; Paul Pressler, pres & CEO.

Banana Republic: 2 Folsom St., San Francisco, Calif. 94105/Phone: (650) 952-4400. Marka Hansen, pres; Jack Calhoun, exec VP-mktg.

In-house.

Goodby, Silverstein & Partners, San Francisco. Robert Riccardi, ptnr & dir-acct mgmt.

PHD, San Francisco. Jeanne Selvester, gm. — print media svcs.

Starcom USA, Chicago. Jack Sullivan, sr VP & dir. — out-of-home buying.

Gap: 1 Harrison St., San Francisco, Calif. 94105/Phone: (650) 952-4400. Cynthia Harriss, pres; Jeff Jones, exec VP-mktg.

Crispin Porter & Bogusky, Miami. Jeff Hicks, pres & CEO.

Laird & Partners, New York. Trey Laird, founder.

Corinthian Media, New York. Ellen Carry, exec VP, acct svcs. — TV buying.

PHD, New York. Steve Grubbs, CEO-N. Amer.; Harry Keeshan, exec VP-natl bdcst. — TV buying.

Starcom USA, Chicago. Jack Sullivan, sr VP, dir. — out-of-home buying.

Gap Inc. Direct: 2 Folsom St., San Francisco, Calif. 94105/Phone: (650) 952-4400. Toby Lenk, pres.

In-house.

Old Navy: 2 Folsom St., San Francisco, Calif. 94105/Phone: (650) 952-4400. Jenny Ming, pres; Susan Wayne, exec VP-mktg.

Deutsch, Los Angeles. Mike Sheldon, mg ptnr & gm.

StrawberryFrog, New York. Scott Goodson, CEO & chief creative officer.

J.L. Media, New Jersey, N.J. Rich Russo, dir-bdcast svcs. — radio buying.

PHD, New York. Harry Keeshan, exec VP-natl bdcst. — TV buying.

Starcom USA, Chicago. Jack Sullivan, sr VP, dir. — out-of-home buying.

Vidal Partnership, New York. Sandra Alfaro, grp acct dir. — Hispanic adv.

14 General Electric Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$115,508	\$99,085	16.6
Sunday magazine	2,253	3,773	-40.3
B2B magazine	28,601	24,114	18.6
Local magazine	178	214	-16.8
Spanish-language magazine	90	269	-66.5
Newspaper	134,357	130,544	2.9
National newspaper	43,474	44,211	-1.7
Spanish-language newspaper	2,484	1,492	66.5
FSI	1,098	600	83.0
Network TV	302,602	242,665	24.7
Spot TV	51,640	49,908	3.5
Syndicated TV	24,835	20,471	21.3
Cable TV network	109,667	100,424	9.2
Spanish-language TV	12,986	12,611	3.0
Network radio	10,644	8,733	21.9
National spot radio	35,881	36,968	-2.9
Outdoor	24,039	16,591	44.9
Internet	28,454	69,819	-59.2
Yellow Pages	4,500	6,500	-30.8
Measured media	933,291	868,992	7.4
Unmeasured media	885,713	854,789	3.6
Total	1,819,004	1,723,781	5.5

By brand	2004	2003	% chg
Universal movies	397,814	384,914	3.4
GE	204,073	151,071	35.1
Universal Videos	96,215	82,162	17.1
NBC	69,808	53,624	30.2
Focus Movies	60,718	62,180	-2.4
USA Cable TV	22,559	59,679	-62.2
Bravo Cable TV	16,047	11,241	42.8
Universal Movies & Recordings	13,928	13,157	5.9
Genworth Financial	12,908	NA	NA

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$152,363	\$134,187	13.5
Earnings	16,593	15,002	10.6
U.S.	2004	2003	% chg
Sales	90,954	84,795	7.3
Division sales	2004	2003	% chg
Commercial Finance	23,489	20,813	12.9
Insurance	23,070	26,194	-11.9
Energy	17,348	19,082	-9.1
Consumer Finance	15,734	12,845	22.5
Transportation	15,562	13,515	15.1
Consumer & Industrial	13,767	12,843	7.2
Healthcare	13,456	10,198	31.9
NBC	12,886	6,871	87.5
Equipment & Other Services	8,483	4,427	91.6
Advanced Materials	8,290	7,078	17.1
Infrastructure	3,447	3,078	12.0
Corporate items and eliminations	-3,169	-2,757	NA

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Headquarters

General Electric Co./3135 Easton Turnpike, Fairfield, Conn. 06828/Phone: (203) 373-2211.

Notes

In May 2004, General Electric and Vivendi Universal merged NBC and Vivendi Universal Entertainment (VUE), forming NBC Universal. The resulting entity is 80% owned by GE and 20% by Vivendi. The two generated a combined \$13.7 billion revenue in 2003. VUE includes Universal Pictures Group (theatrical, home video, TV production), Universal Television Group (cable TV units USA Network, SciFi and Trio) and Universal theme parks and resorts in Los Angeles, Orlando, Osaka and Barcelona. NBC Universal is led by NBC exec Bob Wright as chairman and CEO.

Personnel, brands, agencies

Corporate: Jeffrey R. Immelt, chmn & CEO; Beth Comstock, corp VP & chief mktg officer; Judy L. Hu, global exec dir-adv & branding.

BBDO Worldwide, New York. Fiona Carter, exec VP & sr acct dir. — GE.

GE Consumer & Industrial: , Louisville, Ky. 40225/Phone: (502) 452-4311. Lloyd G. Trotter, pres & CEO; James P. Campbell, pres & CEO-Americas; Paul Klein, mgr-adv, cons & commercial lighting prods & major appliances.

BBDO Worldwide, New York. Fiona Carter, exec VP & sr acct dir.

OMD Worldwide, New York. Toni Racioppo, acct dir; Suzanne Nowacki, acct dir. — media svcs.

GE Consumer Finance: 1600 Summer St., Stamford, Conn. 06905/Phone: (203) 357-4000. David R. Nissen, pres & CEO; George Awad, sr VP-mktg.

No agency.

Genworth Financial: 6620 W. Broad St., Richmond, Va. 23230/Phone: (804) 662-2400. Michael D. Fraizer, pres & CEO; Buzz Richmond, sr VP-mktg.

Klamath Communications, New York. Chris Callas, acct mgr. — Genworth Financial.

NBC Universal: 30 Rockefeller Plaza, New York, N.Y. 10112/Phone: (212) 664-4444. Robert C. Wright, vice chmn-GE & CEO-NBC Universal; Randy Falco, pres-TV networks grp; Keith Turner, pres-NBC Universal sls & mktg; Marianne Gambelli, exec VP-NBC Universal sls & mktg; Alan Wurtzel, pres-rsch & media devel; Jay Linden, exec VP-strategic partnership grp; Ed O'Donnell, sr VP-mktg; John Miller, chief mktg officer-NBC Universal Television group; Ron Meyer, pres & chief operating officer-Universal Studios; Stacey Snider, chmn-Universal Pictures; Marc Schmuger, vice chmn-Universal Pictures; Tom Williams, chmn & CEO-Universal Parks and Resorts.

DDB Worldwide Communications, Los Angeles. Gary Fountain, chief operating officer & gr acct dir. — Universal Pictures.

MediaVest, Los Angeles. Tom Szczepanski, sr VP & mg dir. — NBC TV Network.

Terry Hines & Associates, Los Angeles. — Focus Features.

In-house. — Bravo, USA.

OMD Worldwide, Los Angeles. Chris Geraci, dir. — media buying, bdcst buying-Universal.

35 General Mills

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$46,261	\$33,014	40.1
Sunday magazine	5,925	7,380	-19.7
B2B magazine	3,233	3,799	-14.9
Local magazine	NA	9	NA
Spanish-language magazine	183	28	553.6
Newspaper	4,047	213	NA
National newspaper	250	NA	NA
Spanish-language newspaper	15	5	200.0
FSI	56,789	53,867	5.4
Network TV	139,196	201,147	-30.8
Spot TV	213,180	219,797	-3.0
Syndicated TV	467	478	-2.3
Cable TV network	136,538	131,815	3.6
Spanish-language TV	9,207	10,218	-9.9
Network radio	2,972	3,130	-5.0
National spot radio	1,305	1,168	11.7
Outdoor	203	1,020	-80.1
Internet	11,865	1,348	780.2
Measured media	631,636	668,436	-5.5
Unmeasured media	280,819	285,105	-1.5
Total	912,455	953,541	-4.3
By brand	2004	2003	% chg
General Mills	261,490	288,254	-9.3
Yoplait	99,331	86,925	14.3
Pillsbury	73,120	80,096	-8.7
Betty Crocker	44,511	56,511	-21.2
Progresso	25,869	33,286	-22.3
Chex Mix Snack Mix	16,286	19,776	-17.6
Pop-Secret	12,628	11,171	13.1
Totinos	11,913	8,496	40.2

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$11,070	\$10,506	5.4
Earnings	1,055	917	15.0
U.S.	2004	2003	% chg
Sales	9,441	9,144	3.2
Earnings before income taxes	1,509	1,316	14.7
Division sales	2004	2003	% chg
U.S. Retail	7,763	7,407	4.8
Bakeries & Foodservice	1,757	1,799	-2.3
International	1,550	1,300	19.2

Headquarters

General Mills/1 General Mills Blvd., Minneapolis, Minn. 55426/Phone: (763) 764-2311.

Personnel, brands, agencies

Corporate: Stephen Sanger, chmn & CEO; Mark Addicks, chief mktg officer; Rick Hosfield, VP-adv; Doug Moore, VP-adv & branding.

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Consumer Foods: 1 General Mills Blvd., Minneapolis, Minn. 55426/Phone: (763) 764-2311. Peter Capell, sr VP & pres-Big G cereals; John Machusick, sr VP & pres-bakeries & foodservice; Chris O'Leary, sr VP-meals; Bob Waldron, pres-Yoplait & Colombo; Kim Nelson, VP & pres-Snacks Unlimited; Jeffrey Rotsch, sr VP-sl; Juliana Chugg, pres-baking prods; Peter Robinson, pres-Pillsbury USA; Ian Friendly, sr VP & CEO-cereal partners ww; Lucio Rizzi, sr VP & pres-General Mills Intl.

Campbell Mithun, Minneapolis. Mike Nelson, exec VP & mgmt super; Shawne Murphy-Johnston, VP & mgmt super. — Betty Crocker Complete Meals, Betty Crocker Desserts, Bisquick, Bowl Appetit, Bugles, Chex Cereal, Chex Mix, Cinnamon Toast Crunch, Gardetto's, Golden Grahams, Hamburger & Chicken Helper, Honey Nut Chex, Lloyd's, Milk N' Cereal Bars, Nature Valley Cereal, Nature Valley granola bars, Pop Secret, Specialty Potatoes, Suddenly Salad, Tuna Helper.

Saatchi & Saatchi, New York. Peter Hubbell, exec VP & grp acct dir-Pillsbury/Meals/Fruit Snacks; Joe Belmonte, exec VP & sr grp acct dir-Big G Cereals & Yoplait; Will Platt Higgins, sr VP & grp acct dir-Big G Cereals; Maureen Falvey, sr VP & grp acct dir-Meals. — Apple Cinnamon Cheerios, Berry Burst Cheerios, Cheerios, Cocoa Puffs, Columbo Yogurt, Cookie Crisp, Country Corn Flakes, Dunkaroos, Fiber One, Frosted Cheerios, Fruit by the Foot, Fruit Roll-Ups, GoGurt, Green Giant, Gushers, Honey Nut Cheerios, Honey Nut Clusters, Kaboom, Kix, Lucky Charms, Monster Cereals, MultiGrain Cheerios, Nouriche, Oatmeal Crisp, Progresso Soups, Old El Paso, Pillsbury Frozen Baked Goods/Breakfast, Pillsbury Breads/Biscuits, Pillsbury Refrigerated Baked Goods, Reese's Puffs, Total, Total Corn Flakes, Total Raisin Bran, Totino's Pizza & Snacks, Trix, Trix yogurt, Wheaties, Yoplait, Yoplait Whips, Yumsters.

Schafer Condon Carter, Chicago. Mark Schafer, mg ptrn-creative. — Foodservice.

Zenith Media, New York. Peggy Green, pres-bdcast; Becky Hom, sr VP & dir-Zenith GPE. — media svcs.

Burrell Communications Group, Chicago. McGee Williams, co-CEO; Fay Ferguson, co-CEO; Karen Goodar, VP & acct mgmt dir. — African-American adv.

Casanova Pendrill Publicidad, Costa Mesa, Calif. Guillermo Cenicerios, acct dir. — Hispanic adv, Cheerios, Honey Nut Cheerios, Kix, Yoplait.

Publicis Dialog, New York. Bryan Russiano, sr VP & exec dir-interactive. — interactive mktg, Cheerios, Fruit by the Foot, Fruit Roll-Ups, Gushers, Honey Nut Cheerios, Pillsbury Crescent, Pillsbury Freezer to Microwave, Pillsbury Pie Crusts, Pillsbury Ready to Bake Cookies, Pillsbury Toaster Strudel, Progresso, Save Lids to Save Lives, Yoplait, Yoplait Healthy Heart, Yumsters.

Small Planet Foods: 719 Metcalf St., Sedro-Woolley, Wash. 98284/Phone: (800) 624-4123. Maria Morgan, pres; Carla Vernon, mktg mgr.

Sterling Rice Group, Boulder, Colo. Sheila Rosen, sr acct dir. — Cascadian Farm, Muir Glen.

1 General Motors Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$476,921	\$456,830	4.4
Sunday magazine	7,435	1,460	409.2
B2B magazine	9,945	10,342	-3.8
Local magazine	1,270	834	52.3
Spanish-language magazine ..	5,329	5,827	-8.5
Newspaper	398,553	215,026	85.4
National newspaper	60,771	57,026	6.6
Spanish-language newspaper ..	1,826	751	143.1
Network TV	753,544	641,423	17.5
Spot TV	444,599	393,011	13.1
Syndicated TV	43,270	49,138	-11.9
Cable TV network	303,852	311,270	-2.4
Spanish-language TV	74,057	59,006	25.5
Network radio	45,195	36,066	25.3
National spot radio	17,231	16,278	5.9
Outdoor	48,307	32,384	49.2
Internet	66,093	44,985	46.9
Yellow Pages	39,382	38,907	1.2
Measured media	2,797,580	2,370,564	18.0
Unmeasured media	1,199,808	1,390,174	-13.7
Total	3,997,388	3,760,738	6.3

By brand	2004	2003	% chg
Chevrolet	895,159	693,265	29.1
GM corporate	508,754	376,746	35.0
GMC	241,002	193,698	24.4
Cadillac	236,814	207,506	14.1
Saturn	219,656	226,630	-3.1
Pontiac	170,288	176,547	-3.5
Buick	121,920	140,198	-13.0
Hummer	99,092	89,282	11.0
Onstar	87,161	47,034	85.3
Ditech.Com	86,042	73,612	16.9
Saab	64,934	79,600	-18.4
GMAC	19,578	19,425	0.8

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$193,517	\$185,837	4.1
Earnings	2,805	3,822	-26.6
U.S.	2004	2003	% chg
Sales	134,380	133,955	0.3
Division sales	2004	2003	% chg
Automotive & other	161,545	155,831	3.7
Financing & insurance ops. ..	31,972	30,006	6.6

Headquarters

General Motors Corp./300 Renaissance Center, P.O. Box 300, Detroit, Mich. 48265-2000/Phone: (313) 556-5000.

Personnel, brands, agencies

Corporate: Rick Wagoner, chmn & CEO; Robert A. Lutz, vice chmn-global prod devel; Thomas J. Kowaleski, VP-comms; Mark LaNeve, VP-N. Amer. vehicle sls, svc & mktg; Brent Dewar, VP-N. Amer. mktg & adv; John G. Middlebrook, VP-global sls, svc & mktg ops; Tim Roush, dir-adv, mktg & strategic ops;

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Elizabeth Lazar, genl dir-adv & media ops; Martin Walsh, exec dir-vehicle sls, svc & mktg support; Steve Tihanyi, genl dir-mktg alliances & promos; Steve Hill, dir-retail plng & GM brand; Jack Bowen, genl dir-CRM.

McCann Erickson Worldwide, Detroit. Garry Neel, exec VP & ww acct dir. — GM corporate adv.

Mullen, Wenham, Mass. Joe Grimaldi, pres & CEO. — GM credit card, GM Certified Used Vehicles.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

Starcom USA, Chicago. Jack Sullivan, sr VP & dir. — out-of-home media buying, All brands.

A Partnership, New York. Jeannie Yuen, CEO. — Asian-American adv.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & grp acct dir; Vicki Gaston, VP & grp acct dir. — Hispanic adv & PR.

Arc Worldwide, New York & Chicago. Dave Fiore, VP & dir-interactive production. — promos, events, & interactive mktg.

Digitas, Boston. Rob Willms, exec VP, head-strategy & enablement & global head-client svcs. — interactive mktg, GM BuyPower, GM.com, Owners Center, ProvingGround.

Carol H. Williams Advertising, Oakland, Calif. Carol H. Williams, pres & CEO. — African-American adv.

Buick-Pontiac-GMC: 100 Renaissance Center, Detroit, Mich. 48265-1000/Phone: (313) 556-5000. John Larson, gm, Buick-Pontiac-GMC; Chong-Ae Shah, brand devel dir, Buick-Pontiac-GMC; Steve Shannon, gm-Buick; Margaret Brooks, mktg dir-Buick; Larry Peck, golf mktg mgr-Buick; Jill Putnam, adv mgr-Buick; Heather Waszczenko, adv mgr-Buick; Mark-Hans Richer, mktg dir-Pontiac; Dennis Maraone, prod dir-Pontiac; Steve Rosenblum, mktg dir-GMC; Craig Bierley, prod dir-GMC.

Chemistri, Troy, Mich. Chris Balicki, sr VP & acct dir. — Pontiac vehicles.

Lowe Worldwide, New York. Anthony Kuhn, exec VP & mg dir. — GMC vehicles.

McCann Erickson Worldwide, Troy, Mich. Garry Neel, exec VP & ww acct dir. — Buick vehicles.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & grp acct dir. — Buick: Hispanic adv, retail; Pontiac & GMC: Hispanic adv, natl & retail.

Digitas, Boston. Rob Willms, exec VP, head-strategy & enablement & global head-client svcs. — Pontiac-GMC retail: dir mktg, interactive mktg, events & promos.

Momentum Worldwide, Birmingham, Mich. Pat Heffernan, mg dir. — sls promo, Buick vehicles.

Cadillac Motor Car Division: 100 Renaissance Center, Detroit, Mich. 48265/Phone: (313) 667-5557. James E. Taylor, mktg gm; John Howell, prod dir; Jon Brancheau, mktg dir; Tim O'Neill, adv mgr; Tom D'Angelo, adv mgr; Tom Hassett, adv mgr.

Chemistri, Troy, Mich. Michael Wright, sr VP & grp acct dir. — Cadillac vehicles.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & grp acct dir. — Hispanic adv, retail.

Digitas, Boston. Rob Willms, exec VP, head-strategy & enablement & global head-client svcs. — relationship mktg, dir mail, email, call center.

Chevrolet Motor Division: 100 Renaissance Center, Detroit, Mich. 48265-1000/Phone: (313) 556-5000. Ed J. Peper, mktg gm; Michael Albano, dir-comms; Kim Kosak, genl dir-adv & sls promo; Megan Stooke, dir-adv & sls promo; Dan Adamcheck, dir-retail adv; Jim Campbell, dir-car mktg; Russ Clark, genl dir-truck mktg.

Campbell-Ewald, Warren, Mich. Mike Ryan, vice chmn & chief operating officer; Andrea Wells, Chevrolet acct dir. — Chevrolet vehicles.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

Accentmarketing, Coral Gables, Fla. Joseph (Pepe) Machin, VP & grp acct dir-retail; Maritere Llorente, VP & grp acct dir-natl. — Hispanic adv, natl & retail.

General Motors Service & Parts Operations: 6200 Grand Pointe Dr., Grand Blanc, Mich. 48439/Phone: (810) 606-2000. Douglas J. Herberger, VP & gm.

Campbell-Ewald, Southfield, Mich. James P. Huchok, exec VP & acct dir. — ACDelco.

Chemistri, Troy, Mich. Michael Talovich, sr VP & acct dir. — GM Parts, GM Goodwrench service, accessories, performance parts.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & grp acct dir. — Hispanic adv, ACDelco.

GMAC: 200 Renaissance Center, Detroit, Mich. 48265-2000/Phone: (313) 556-5000. Eric A. Feldstein, chmn; William F. Muir, pres & chmn-GMAC Insurance; John E. Gibson, exec VP & pres-N. Amer. Opers; Lori Williams, genl dir-N. Amer. Opers mktg & adv.

Campbell-Ewald, Warren, Mich. James P. Huchok, exec VP & acct dir. — GMAC financial svcs.

Chemistri, Troy, Mich. Thomas Downey, sr VP & grp acct dir. — GMAC business to business.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & grp acct dir. — Hispanic adv.

GMAC Residential Holdings: 100 Witmer Rd., P.O. Box 963, Horsham, Pa. 19044/Phone: (215) 682-1000. David Applegate, pres & CEO; Richard Gillespie, exec VP & chief mktg officer.

Agencies assigned on a project basis. — Ditech.com, GMAC Bank, GMAC Global Relocation, GMAC Mortgage, GMAC Real Estate.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs, Ditech.com.

Hummer: 100 Renaissance Center, Detroit, Mich. 48265-1000/Phone: (313) 556-5000. Susan Docherty, gm; Marc Hernandez, prod dir; Liz Vanzura, mktg dir; Jeff Edwards, sls dir.

Modernista, Boston. Gary Koepke, chmn; Lance Jensen, CEO. — Hummer vehicles.

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GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

OnStar Corp.: 400 Renaissance Center, P.O. Box 400, Detroit, Mich. 48265-400/Phone: (313) 665-2783. Chet Huber, pres; Tony DiSalle, VP-sls & mktg; Tim Conner, adv mgr.

Campbell-Ewald, Warren, Mich. Phil Mueller, sr VP & grp mgmt super. — OnStar vehicle monitoring system.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

Accentmarketing, Coral Gables, Fla. Marta Noa, sr VP & grp acct dir. — Hispanic adv.

Digitas, Boston. Rob Willms, exec VP, head-strategy & enablement & global head-client svcs. — interactive mktg, dir mktg.

Saab Cars USA: 100 Renaissance Center, Detroit, Mich. 48265-1000/Phone: (313) 556-5000. Jay Spenchian, gm; Mike Colleran, dir-sls; Leslie Bublin, dir-mktg.

Lowe Worldwide, New York. Susan Cantor, CEO. — Saab vehicles.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

Digitas, Boston. Rob Willms, exec VP, head-strategy & enablement & global head-client svcs. — interactive mktg, dir mktg.

Saturn Corp.: 100 Renaissance Center, Detroit, Mich. 48265-1000/Phone: (313) 665-5000. Jill Lajdziak, gm; Sam Mancuso, dir-mktg; Scott McLaren, adv mgr.

Goodby, Silverstein & Partners, San Francisco. Brian Dunbar, grp acct dir; John Weber, acct dir-retail & VUE; Rene Cournoyer, acct dir-brand, Relay & L Series; Jennifer Fox, acct dir-ION & Red Line. — Saturn vehicles.

GM Planworks, Detroit. Dennis Donlin, pres; Mary Carpenter, chief operating officer. — media svcs.

41 Gillette Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$94,280	\$53,112	77.5
Sunday magazine	2,682	553	385.0
B2B magazine	1,035	772	34.1
Local magazine	NA	26	NA
Spanish-language magazine	184	677	-72.8
Newspaper	5,485	3,198	71.5
National newspaper	668	433	54.3
Spanish-language newspaper	28	NA	NA
FSI	22,126	15,565	42.2
Network TV	220,962	143,035	54.5
Spot TV	6,324	4,049	56.2
Syndicated TV	78,692	50,844	54.8
Cable TV network	105,219	62,204	69.2
Spanish-language TV	11,041	10,703	3.2
Network radio	7,877	4,719	66.9
National spot radio	2,806	574	388.9
Outdoor	3,247	637	409.7
Internet	3,282	989	231.9
Measured media	565,938	352,090	60.7
Unmeasured media	270,695	287,771	-5.9
Total	836,633	639,861	30.8

By brand	2004	2003	% chg
Gillette shaving products	223,926	115,561	93.8
Oral-B	151,807	82,017	85.1
Duracell	86,794	64,180	35.2
Right Guard	32,060	22,672	41.4
Braun	26,471	24,467	8.2
Rembrandt	12,816	13,435	-4.6

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$10,477	\$9,252	13.2
Earnings	1,691	1,385	22.1
U.S.	2004	2003	% chg
Sales	3,645	3,448	5.7
U.S. Pre-tax income, cont. ops.	1,144	822	39.2
Division sales	2004	2003	% chg
Blades & razors	4,329	3,869	11.9
Duracell products	2,232	2,015	10.8
Oral care	1,589	1,327	19.7
Braun	1,366	1,177	16.1
Personal care	961	864	11.2

Headquarters

Gillette Co./Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000.

Notes

Procter & Gamble Co. announced in January 2005 that it is acquiring Gillette Co. The deal, valued at \$57 billion, could close as early as this fall. Gillette in 2004 acquired Den-Mat's Rembrandt line of teeth-whitening products and Zooth, the children's toothbrush business.

Personnel, brands, agencies

Corporate: James M. Kilts, chmn, pres & CEO; Edward F. DeGraan, vice chmn; Peter Klein, sr VP-strategy & bus devel.

MindShare Worldwide, New York. Ernie Simon, pres & strategic plng dir. — media svcs.

Blades & Razors: Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000. Peter Hoffman, pres.

BBDO Worldwide, New York. Simon Marlow, exec VP & mg dir. — Mach 3, Venus, Sensor3.

MindShare Worldwide, New York. Ernie Simon, pres & strategic plng dir.

Braun: Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000. Mark Leckie, pres.

BBDO Worldwide, New York. Simon Marlow, exec VP & mg dir. — Electric shavers.

MindShare Worldwide, New York. Ernie Simon, pres & strategic plng dir. — media svcs.

Commercial Operations North America: Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000. Joseph F. Dooley, pres; James White, VP-bus devel; Richard Meyer, dir-media svcs.

Duracell: 8 Research Dr., Berkshire Corporate Park, Bethel, Conn. 06801/Phone: (203) 769-4000. Mark Leckie, pres.

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Acme Idea Co., Norwalk, Conn. Carol Herman, dir-bus devel. — Duracell batteries.

MindShare Worldwide, New York. Ernie Simon, pres & strategic plng dir. — media svcs.

Oral Care Products: Prudential Tower Bldg., Boston, Mass. 02199/Phone: (617) 421-7000. Bruce Cleverly, pres.

Arnold Worldwide, Boston. Jonathan Goldmacher, sr VP & grp acct dir. — Oral-B prof dental svcs.

BBDO Worldwide, New York. Simon Marlow, exec VP & mg dir. — Oral-B oral care appliances, Rembrandt toothpastes & tooth whitening prods, Zooth toothbrushes.

MindShare Worldwide, New York. Ernie Simon, pres & strategic plng dir. — media svcs.

Personal Care Products: Prudential Tower Bldg, Boston, Mass. 02199/Phone: (617) 421-7000. Mary Ann Pesce, pres.

Arnold Worldwide, Boston. Paul Nelson, sr VP & grp acct dir. — TAG Body Spray.

BBDO Worldwide, New York. Simon Marlow, exec VP & mg dir. — After shave, Gillette series, Right Guard, Satin Care pre/post shave, preps, Soft & Dri.

MindShare Worldwide, New York. Ernie Simon, pres & strategic plng dir. — media svcs, strategic plng dir.

11 GlaxoSmithKline

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$183,929	\$170,774	7.7
Sunday magazine	6,264	11,174	-43.9
B2B magazine	1,488	3,447	-56.8
Local magazine	30	149	-79.9
Spanish-language magazine	440	535	-17.8
Newspaper	10,474	16,877	-37.9
National newspaper	2,644	5,939	-55.5
Spanish-language newspaper	111	5	NA
FSI	10,999	10,276	7.0
Network TV	338,730	291,392	16.2
Spot TV	20,564	22,022	-6.6
Syndicated TV	83,954	93,677	-10.4
Cable TV network	202,893	140,383	44.5
Spanish-language TV	1,458	NA	NA
Network radio	2,733	3,323	-17.8
National spot radio	8,338	4,403	89.4
Outdoor	1,995	2,761	-27.7
Internet	11,525	13,560	-15.0
Measured media	888,569	790,697	12.4
Unmeasured media	939,702	771,778	21.8
Total	1,828,271	1,562,475	17.0
By brand	2004	2003	% chg
Flonase	118,595	91,675	29.4
Wellbutrin	109,101	48,305	125.9
Valtrex Herpes Rx	100,585	70,797	42.1
Advair Asthma Rx	88,667	102,485	-13.5
Imitrex Migraine Rx	74,153	74,928	-1.0
Glaxo	52,781	17,872	195.3
Paxil	41,183	61,245	-32.8

By brand	2004	2003	% chg
Commit Nicotine Lozenge	40,073	41,528	-3.5
Aquafresh	31,864	32,375	-1.6
Tums	30,273	44,983	-32.7
Nicoderm	26,680	25,884	3.1
Nicorette	23,818	24,545	-3.0
Abreva	21,391	27,427	-22.0
Avandia Diabetes Rx	15,367	31,542	-51.3
Asthma Condition	14,446	4,147	248.3
Orange Card Prescription Card	11,853	0	NA

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$37,437	\$35,275	6.1
Earnings	7,911	7,367	7.4
U.S.	2004	2003	% chg
Sales	16,982	17,028	-0.3
Division sales	2004	2003	% chg
Pharmaceuticals	31,529	29,912	5.4
Consumer healthcare	5,908	5,363	10.2

Headquarters

GlaxoSmithKline/980 Great West Rd., Brentford, Middlesex, United Kingdom TW8 9GS/Phone: 44-20-8047-5000.

GlaxoSmithKline/5 Moore Dr., P.O. Box 13398, Research Triangle Park, N.C. 27709/Phone: (919) 483-2100.

Personnel, brands, agencies

Corporate: J.P. Garnier, CEO; David Stout, pres-pharmaceutical ops; Chris Viehbach, pres-U.S. pharmaceuticals

GlaxoSmithKline Consumer Healthcare: 100 Beecham Dr., Pittsburgh, Pa. 15205/Phone: (412) 928-1000. Jack Ziegler, pres.

Arnold McGrath, New York, New York. Barry Silverstein, exec VP & grp dir. — Citrucel, Committ, Ecotrin, Gaviscon, Nicoderm CQ, Nicorette, Oxy Balance, Tums.

Grey Healthcare Group, New York. Jane Parker, grp pres-ww adv. — Aquafresh, Contac, Dentu-Crème, Flex toothbrushes, Massengill, Poli-Grip, Polident, Sensodyne, Super Poli-Grip.

Grey Worldwide, New York. Bob Burrus, exec VP & mg ptrn; John Edwards, exec VP & mg ptrn. — Aquafresh toothpaste, Aquafresh Extreme Clean, Flex Toothbrushes, Sensodyne, Super Poligrip.

MediaCom, New York. Sal Sannino, sr VP & grp dir. — media svcs, Aquafresh, Contac, Geritol, Massengill, Oscal, Poligrip, Polident, Sensodyne, Vivarin, Sominex.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Matt Schwach, mg ptrn & acct dir. — media svcs.

Optimedia International, Dallas. Tom Scott, sr VP & grp dir-strategic comms. — media plng, Beano, BC headache Powder, Goody's Headache Powder, Oscal, Phazyme.

Publicis USA, Dallas. Carter Keith, sr VP & gp acct dir. — media buying, BC Analgesics, Bean-O-food enzyme supplements, Goody's headache powder, Os-cal, Phazyme gas relief.

WING Latino, New York. Jackie Bird, pres & CEO; Tony Dagnery, VP-bus devel. — Hispanic intergrated mktg comms, Aquafresh, Sensodyne, Tums.

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GlaxoSmithKline Pharmaceutical Division: 1 Franklin Plaza, 200 N. 16th St., Philadelphia, Pa. 19102/Phone: (888) 825-5249. Chris Viehbacher, pres-U.S. pharmaceuticals; David Stout, pres-pharmaceutical ops; Bob Ingram, vice chmn-pharmaceuticals.

BBDO Worldwide, New York. Anne Devereux, exec VP & mg dir. — Avandia, Levitra, Malarone, Twinrix.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; David Chapman, pres-Ferguson (a CommonHealth co.) — Avandamet, Avandia, Avodart.

Euro RSCG Worldwide, New York. Paul Klein, grp acct dir. — Advair, Valtrex, Vesicare.

FCB HealthCare, New York. Tom Domanico, chmn, CEO & ww creative dir; Dana Maiman, pres & CEO. — Augmentin XR, Bactroban, Boostrix, Energix-B, Havrix, Infanrix, Lamictal, Pediarix, Timentin, Twinrix, Valtrex, Wellbutrin XL.

Grey Healthcare Group, New York. Jane Parker, grp pres-ww adv. — Imitrex.

Grey Worldwide, New York. Bob Burrus, exec VP & mg ptrn; John Edwards, exec VP & mg ptrn. — Abreva, Flonase, Imitrex, Wellbutrin.

Klemmer, New York. Sam Welch, mg dir. — Coreg.

McCann Erickson Worldwide, New York. Gary Chu, sr VP & grp acct dir. — Avodart, Coreg, Paxil, Repui.

Saatchi & Saatchi Healthcare, New York. exec VP & mg dir. — Boniva, Coreg.

MediaCom, New York. Sal Sannino, sr VP & grp dir. — media buying, Abreva, Remifemin.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Matt Schwach, mg ptrn & acct dir. — media svcs.

Palio Communications, Saratoga Springs, N.Y. Ed Mitzen, pres; Mike Myers, exec VP & mg dir. — Cervarix, HIV Franchise, Oncology Franchise, Levitra, Lotronex.

37 Hewlett-Packard Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$109,392	\$143,782	-23.9
Sunday magazine	7,006	22,108	-68.3
B2B magazine	53,237	42,825	24.3
Spanish-language magazine	.287	89	222.5
Newspaper	36,954	54,348	-32.0
National newspaper	32,181	52,948	-39.2
Spanish-language newspaper	.2	2	0.0
FSI	NA	10	NA
Network TV	97,964	81,965	19.5
Spot TV	12,446	40,211	-69.0
Syndicated TV	8,216	58	NA
Cable TV network	49,313	25,223	95.5
Network radio	.50	NA	NA
National spot radio	1,420	2,684	-47.1
Outdoor	2,163	1,444	49.8
Internet	137,453	69,625	97.4
Measured media	548,084	537,322	2.0
Unmeasured media	350,413	407,367	-14.0
Total	898,497	944,689	-4.9

By brand	2004	2003	% chg
Hewlett-Packard	530,627	430,721	23.2
Compaq	17,309	106,389	-83.7

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$79,905	\$73,061	9.4
Earnings	3,497	2,539	37.7
U.S.	2004	2003	% chg
Sales	29,362	29,218	0.5
Division sales	2004	2003	% chg
Personal Systems Group	24,622	21,210	16.1
Imaging & Printing Group	24,199	22,569	7.2
Enterprise Storage & Servers	15,152	14,593	3.8
HP Services	13,778	12,357	11.5
HP Financial Services	1,895	1,921	-1.4

Headquarters

Hewlett-Packard Co./3000 Hanover St., Palo Alto, Calif. 94304-1185/Phone: (650) 857-1501.

Notes

Mark Hurd, 48, the former president and CEO of NCR, replaced Carly Fiorina as CEO at Hewlett-Packard in March 2005. Ms. Fiorina was dismissed from the post earlier in the year.

Personnel, brands, agencies

Corporate: Mark Hurd, CEO; Michael Winkler, exec VP-customer solutions grp; Cathy Lyons, chief mktg officer; Gary Elliott, VP-brand mktg; Julia Mee, dir-global brand adv; Scott Berg, ww media plng & buying.

Goodby, Silverstein & Partners, San Francisco. John Coyne, grp acct dir; Todd Grantham, account dir-enterprise. — Brand adv, brand media plng, Hewlett-Packard computers.

Publicis & Hal Riney, San Francisco. Scott Mullins, sr VP & grp acct dir. — segment & prod mktg, SMB, Enterprise, Public Sector, Channel, ProCurve.

ZenithOptimedia, San Francisco. Julie Rieger, exec VP & dir-ww comms. — media buying, Compaq, HP, all brands.

Agency.com, Chicago. Dave Johnson, sr VP & mg ptrn-Chicago. — interactive mktg.

Burson-Marsteller, New York. — pr.

Publicis & Hal Riney, San Francisco. Scott Mullins, sr VP & grp acct dir. — integrated direct response.

23 Home Depot

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$61,425	\$51,052	20.3
Sunday magazine	.682	1,456	-53.2
B2B magazine	.589	779	-24.4
Local magazine	.62	76	-18.4
Spanish-language magazine	.131	20	555.0
Newspaper	78,804	93,479	-15.7
National newspaper	3,285	5,085	-35.4
Spanish-language newspaper	1,989	1,467	35.6
FSI	.1	24	-95.8

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Network TV	142,749	152,011	-6.1
Spot TV	12,141	32,809	-63.0
Syndicated TV	2,572	11,296	-77.2
Cable TV network	103,656	76,573	35.4
Spanish-language TV	25,698	27,842	-7.7
Network radio	2,112	1,535	37.6
National spot radio	85,958	102,523	-16.2
Outdoor	1,396	2,383	-41.4
Internet	4,241	2,842	49.2
Yellow Pages	6,450	7,561	-14.7
Measured media	533,941	570,813	-6.5
Unmeasured media	721,987	453,237	59.3
Total	1,255,928	1,024,050	22.6
By brand	2004	2003	% chg
Home Depot	518,259	548,607	-5.5

Sales & earnings (\$ in millions)

Worldwide & N. Amer.	2004	2003	% chg
Sales	\$73,094	\$64,816	12.8
Earnings	5,001	4,304	16.2

Headquarters

Home Depot/2455 Paces Ferry Rd., N.W., Atlanta, Ga. 30339/Phone: (770) 433-8211.

Personnel, brands, agencies

Corporate: Robert L. Nardelli, chmn, pres & CEO; John Costello, exec VP-merch & chief mktg officer; Roger Adams, sr VP-mktg; John Ross, VP-adv; Annette Verschuren, pres-EXPO Design Center.

Richards Group, Dallas. Diane Fannon, principal; Doug Martin, principal; Gary Gibson, creative dir; Craig Anderson, creative dir.

Initiative Media Worldwide, Atlanta. Brian Kelly, exec VP-retail mktg. — media svcs.

Strategic Print Marketing, Marietta, Ga. Gabriella Austin, VP; Jack Feichtner, acct exec. — media buying-print.

Ambrosi, Atlanta. Jeremy Gustafuson, mg dir; Kristen Trombino, acct mg.

DDB Worldwide Communications, Chicago. Jim Lecinski, sr VP & grp acct dir. — direct mktg.

Vidal Partnership, New York. Sandra Alfaro, VP & grp acct dir; Mauricio Galvan, VP & creative dir. — Hispanic adv.

UniWorld Group, Atlanta. Fiona Roache, dir-client svcs; Ronny Mills, grp acct dir. — African-American adv.

27 Honda Motor Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$124,312	\$118,212	5.2
Sunday magazine	1,464	1,623	-9.8
B2B magazine	1,409	1,055	33.6
Local magazine	35	NA	NA
Spanish-language magazine	439	360	21.9
Newspaper	20,666	14,046	47.1
National newspaper	16,237	12,120	34.0

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Spanish-language newspaper	172	4	NA
Network TV	101,221	101,353	-0.1
Spot TV	384,141	330,932	16.1
Syndicated TV	4,035	10,305	-60.8
Cable TV network	95,052	87,657	8.4
Spanish-language TV	17,763	19,141	-7.2
Network radio	650	650	0.0
National spot radio	653	211	209.5
Outdoor	1,990	2,651	-24.9
Internet	12,947	7,136	81.4
Yellow Pages	7,658	8,440	-9.3
Measured media	790,844	715,896	10.5
Unmeasured media	414,058	425,385	-2.7
Total	1,204,902	1,141,281	5.6
By brand	2004	2003	% chg
Honda	565,069	485,582	16.4
Acura	217,676	221,458	-1.7

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$77,232	\$68,286	13.1
Earnings	4,393	3,655	20.2
North America	2004	2003	% chg
Sales	42,373	39,002	8.6
Division sales	2004	2003	% chg
Automotive	61,351	55,168	11.2
Motorcycles	9,272	8,379	10.7
Power products & other	3,086	2,701	14.3
Financial svcs	2,259	2,038	10.8

Headquarters

Honda Motor Co./1-1, 2-chome, Minami-Aoyama, Minato-ku, Tokyo, Japan 107-8556/Phone: 81-3-3423-1111.

Honda Motor Co./American Honda Motor Co., 1919 Torrance Blvd., Torrance, Calif. 90501-2746/Phone: (310) 783-2000.

Personnel, brands, agencies

Corporate: Takeo Fukui, pres & CEO-Honda Motor Co.; Koichi Kondo, pres & CEO-American Honda Motor Co.; Rob Alen, mgr-corp adv-American Honda Motor Co.

RPA, Santa Monica, Calif. Bill Hagelstein, exec VP.

Auto Division: 1919 Torrance Blvd., Torrance, Calif. 90501-2746/Phone: (310) 783-2000. John Mendel, sr VP-auto opers; Richard Collier, exec VP-auto sls; Richard Szamborski, VP-natl sls, Honda; Steven Center, asst VP-sls, Acura; Eric Conn, asst VP-natl auto adv; Tom Peyton, sr mgr-Honda adv; Susie Rossick, mgr-Acura adv; Barbara Ponce, mgr-emerging mkt adv.

RPA, Santa Monica, Calif. Bill Hagelstein, exec VP; Chuck Valentine, sr VP & grp acct dir-Honda vehicles; Joan Egan, VP & grp acct dir-Acura vehicles. — Acura vehicles, Honda vehicles.

La Agencia de Orci & Asociados, Los Angeles. Dilys Garcia, chief operating officer. — Hispanic adv, Honda vehicles.

Muse, Los Angeles. Jo Muse, chmn & CEO. — African-American & Asian-American adv, Honda vehicles.

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Honda Power Equipment: 4900 Marconi Dr., Alpharetta, Ga. 30005/Phone: (678) 339-2600. Akira Imai, VP; Wade Terry, VP; John Lally, mgr-natl adv.

Frank/Best International, Nashville, Tenn. Bobby Frank, pres & gm; Gunnar Eng, VP-client svcs; Tim Best, exec VP & creative dir.

Motorcycle Division: 1919 Torrance Blvd., Torrance, Calif. 90501-2746/Phone: (310) 783-2000. Raymond Blank, VP; Wayne Toyota, sr mgr-motorcycle adv & promo.

Dailey & Associates, Los Angeles. Steve Mitchell, sr VP & mg super. — Honda all terrain vehicles, motorcycles, personal watercraft, scooters & Honda Riders' Club of America.

69 Hyundai Motor Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$32,484	\$16,049	102.4
B2B magazine	926	660	40.3
Local magazine	10	NA	NA
Spanish-language magazine	396	159	149.1
Newspaper	5,043	2,217	127.5
National newspaper	1,265	1,707	-25.9
Spanish-language newspaper	NA	6	NA
Network TV	112,699	48,239	133.6
Spot TV	133,613	121,031	10.4
Syndicated TV	28,031	4,867	475.9
Cable TV network	34,062	26,817	27.0
Spanish-language TV	19,275	15,142	27.3
Network radio	385	NA	NA
National spot radio	308	390	-21.0
Outdoor	1,223	658	85.9
Internet	3,809	1,635	133.0
Measured media	373,529	239,577	55.9
Unmeasured media	160,083	93,169	71.8
Total	533,612	332,746	60.4
By brand	2004	2003	% chg
Hyundai	373,527	239,576	55.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$24,156	\$20,950	15.3
Earnings	1,586	1,482	7.0

Headquarters

Hyundai Motor Co./231 Yangjai-dong, Seocho-gu, Seoul, South Korea 137-938/Phone: 82-2-3464-1114.

Hyundai Motor Co./Hyundai Motor America, 10550 Talbert Ave., Fountain Valley, Calif. 92728/Phone: (714) 965-3000.

Notes

Hyundai Motor Co. owns 39% of Kia Motors Corp., another 100 Leading National Advertisers company.

Personnel, brands, agencies

Corporate: Mong-Koo Chung, chmn & CEO; Dong-Jin Kim, pres.

Hyundai Motor America: 10550 Talbert Ave., Fountain Valley, Calif. 92728/Phone: (714) 965-3000. Robert Cosmai, pres & CEO; Ed Bradley, VP-natl sls; John Krafcik, VP-prod devel & strategic plng and acting VP-mktg & comms.

Richards Group, Dallas. Dale Hruby, principal. — Hyundai vehicles.

Carat North America, Los Angeles. Tom Somerset, sr VP & grp acct dir. — media svcs.

Dieste, Harmel & Partners, Irvine, Calif. Yolanda Cassity, gm. — Hispanic adv.

57 IBM Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$66,885	\$73,434	-8.9
Sunday magazine	NA	108	NA
B2B magazine	55,209	66,654	-17.2
Spanish-language magazine	160	160	0.0
Newspaper	1,848	6,270	-70.5
National newspaper	45,054	44,744	0.7
Spanish-language newspaper	44	31	41.9
Network TV	103,815	110,438	-6.0
Spot TV	323	168	92.3
Syndicated TV	2,989	9,013	-66.8
Cable TV network	22,703	32,885	-31.0
National spot radio	335	497	-32.6
Outdoor	1,865	1,716	8.7
Internet	8,388	5,378	56.0
Measured media	309,618	351,496	-11.9
Unmeasured media	322,254	356,733	-9.7
Total	631,872	708,229	-10.8
By brand	2004	2003	% chg
IBM	309,103	346,101	-10.7

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$96,293	\$89,131	8.0
Earnings	8,430	7,583	11.2
U.S.	2004	2003	% chg
Sales	35,637	33,762	5.6
U.S. operations (before taxes)	5,280	4,611	14.5
Division sales	2004	2003	% chg
Global Services	46,213	42,635	8.4
Hardware	31,154	28,239	10.3
Software	15,094	14,311	5.5
Global Financing	2,608	2,826	-7.7
Enterprise Investments/Other	1,224	1,120	9.3

Headquarters

IBM Corp./New Orchard Rd., Armonk, N.Y. 10504/Phone: (914) 499-1900.

Notes

In January 2005, IBM Corp. agreed to a \$1.75 billion buyout of its personal computer division by Chinese computer maker Lenovo. The IBM PC brand supported by advertising is expected to continue for up to five years. That includes the popular ThinkPad notebooks and ThinkCentre. The deal was expected to close by

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summer. Under the deal, Lenovo is expected to cede management to IBM PC executives (Stephen Ward at IBM is expected to be CEO), with Lenovo's current CEO moving to a non-operational chairman role. The new headquarters of Lenovo will be in Armonk, New York.

Personnel, brands, agencies

Corporate: Sam Palmisano, chmn & CEO; Abby Kohnstamm, sr VP-mktg; Lisa Baird, VP-ww integrated mktg comms; Deidre Bigley, VP-ww adv.

IBM Direct Marketing: 1133 Westchester Ave., White Plains, N.Y. 10604/Phone: (800) 426-4968. Sergio Restrepo, VP-mktg & integrated mktg comms, Americas.

OgilvyOne Worldwide, New York. Carla Hendra, pres-OgilvyOne N. Amer.; Bruce Lee, sr ptnr & exec dir-creative. — Software, servers, services, ww strategy, N. Amer. execution, global direct mktg.

IBM Global Services: Route 100, Somers, N.Y. 10589/Phone: (914) 766-1900. John R. Joyce, sr VP & grp exec; Mary Garrett, VP-mktg; Mark Rosen, VP-integrated mktg comms.

Ogilvy & Mather Worldwide, New York. Lou Aversano, exec grp dir.

IBM Systems Group: Route 100, Somers, N.Y. 10589/Phone: (914) 766-1900. William Zeitler, sr VP & grp exec; Maureen McGuire, VP-mktg & strategy; Nancy Roath, VP-integrated mktg comms, eServer.

Ogilvy & Mather Worldwide, New York. Sally Kissane, dir-adv. — IBM eServer pSeries, xSeries, iSeries, zSeries.

IBM.com: 1133 Westchester Ave., White Plains, N.Y. 10604/Phone: (914) 766-1900. Rich Hume, gm; Pam Kaplan, VP-global mktg; Curt Gillespie, VP-mktg & sls programs.

OgilvyInteractive, New York. Carla Hendra, pres-OgilvyOne, OgilvyInteractive. — interactive mktg.

Digitas, New York. Robert Powers, sr VP-mktg, N.Y.. — website comms.

Software Group: Route 100, Somers, N.Y. 10589/Phone: (914) 766-1900. Steve Mills, sr VP & grp exec; Marc Dupaquier, VP-mktg; Dan Galvan, VP-integrated mktg comms; Ann Rubin, dir-integrated mktg comms.

Ogilvy & Mather Worldwide, New York. Tim Eldridge, exec grp dir. — DB2, developerWorks, WebSphere, Lotus, Tivoli.

55 IAC/InterActiveCorp

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$31,731	\$22,188	43.0
Sunday magazine	148	516	-71.3
B2B magazine	564	510	10.6
Local magazine	32	19	68.4
Newspaper	7,706	2,233	245.1
National newspaper	5,916	2,911	103.2
Spanish-language newspaper	20	7	185.7

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Network TV	74,079	45,728	62.0
Spot TV	19,870	30,475	-34.8
Syndicated TV	29,980	31,200	-3.9
Cable TV network	86,740	78,152	11.0
Network radio	17,623	23,563	-25.2
National spot radio	4,960	5,264	-5.8
Outdoor	9,554	1,952	389.4
Internet	131,944	128,656	2.6
Measured media	420,867	373,374	12.7
Unmeasured media	226,620	152,504	48.6
Total	647,487	525,878	23.1

By brand	2004	2003	% chg
Expedia.com	171,852	117,430	46.3
Lendingtree.com	69,206	78,309	-11.6
Hotels.com	61,698	55,225	11.7
Match.com	50,941	76,881	-33.7
Hotwire.com	44,587	28,988	53.8

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$6,193	\$6,328	-2.1
Earnings	152	154	-1.3

U.S.	2004	2003	% chg
Sales	5,062	5,227	-3.2

Division sales	2004	2003	% chg
Electronic Retailing	2,382	2,230	6.8
IAC Travel	2,116	1,670	26.7
Ticketing	768	743	3.4
IAC Local & Media Services	295	230	28.3
Teleservices	294	294	0.0
Personals	198	185	7.0
Financial Services & Real Estate	190	56	239.3

Headquarters

IAC/InterActiveCorp/152 W. 57th St., 42nd Fl., New York, N.Y. 10019/Phone: (212) 314-7300.

Personnel, brands, agencies

Corporate: Barry Diller, chmn & CEO; Victor Kaufman, vice chmn; Julius Genachowski, exec VP & chief-bus ops.

Citysearch: 3731 Wilshire Blvd., Ste. 300, Los Angeles, Calif. 90010/Phone: (213) 739-3200. Briggs Ferguson, CEO; Lisa Carrieri, mktg mgr.

In-house.

Entertainment Publications: 1414 E. Maple Rd., Troy, Mich. 48083/Phone: (248) 637-8400. Alan Bittker, pres & CEO.

No agency.

Evite: 3731 Wilshire Blvd., Ste. 300, Los Angeles, Calif. 90010/Phone: (213) 739-3200. Anne Busquet, CEO-IAC Local; Hilary Hattenbach, dir-sls & mktg.

In-house.

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Expedia: 3150 139th Ave. SE, Bellevue, Wash. 98005/Phone: (425) 679-7200. Dara Khosrowshahi, pres & CEO; Sarah Makar, VP-mktg; Donna Wells, sr VP-mktg & packages.

Deutsch, Los Angeles. Mike Sheldon, mg ptrn & gm. — Expedia.com.

Gifts.com: 3731 Wilshire Blvd., Ste. 300, Los Angeles, Calif. 90010/Phone: (213) 739-3200. William Lynch, pres & CEO; Tom Nguyen, dir-mktg.

In-house.

Hotels.com: 10440 N. Central Expressway, Ste. 400, Dallas, Texas 75231/Phone: (214) 361-7311. Cheryl Rosner, pres; Carl Minto-Sparks, sr VP-mktg.

Doner, Detroit. Kevin Weinman, exec VP & dir-acct mgmt. — print & broadcast adv, Hotels.com.

Avenue A/Razorfish, Chicago. Kristie Frankland, acct dir. — online adv.

Hotwire: 333 Market St., Ste. 100, San Francisco, Calif. 94105/Phone: (415) 343-8400. Bob Hohman, pres; Ramy Mora, VP-mktg.

McCann Erickson Worldwide, San Francisco. Frank Dibiasi, sr VP-acct dir. — Hotwire.

Universal McCann Worldwide, San Francisco. Karen Polsky, sr VP-mg dir. — media svcs.

HSN: 1 HSN Dr., St. Petersburg, Fla. 33729/Phone: (727) 872-1000. Marty Nealon, pres-HSN U.S.; Kate Pedrick, VP-mktg.

No agency.

Interval International: 6262 Sunset Dr., Miami, Fla. 33243-1920/Phone: (305) 666-1861. Craig M. Nash, chmn & CEO; Dave Gilbert, exec VP-sls & mktg.

Yesawich, Pepperdine, Brown & Russell, Orlando. Rod James, acct dir.

LendingTree: 1115 Rushmore Dr., Charlotte, N.C. 28277/Phone: (704) 541-5351. Douglas R. Lebda, CEO-IAC financial svcs & real estate; Thomas J. Reddin, CEO-real estate & IAC financial svcs & real estate; Anthony Hsieh, CEO-LendingTree loans; Robert Harris, chief mktg officer.

Mullen, Wenham, Mass. Jim Hartrich, exec VP & acct dir. — Lending Tree.

Match.com: 3001 George Bush Highway, Ste. 100, Richardson, Texas 75082/Phone: (214) 576-9352. Jim Safka, CEO; Darcy Cameron, dir-mktg.

Hanft, Raboy & Partners, Dallas. Adam Hanft, principal; Doug Raboy, principal.

Mullen, Wenham, Mass. John Moore, sr VP-grp media dir. — media svcs.

Reserve America: 40 South St., Ballston Spa, N.Y. 12020/Phone: (800) 695-4636. Brendan Ross, pres & chief operating officer; John McDonald, sr mgr-mktg comms.

In-house.

ServiceMagic.com: 14023 Denver W. Pkwy., Bldg. 64, Ste. 200, Golden, Colo. 80401/Phone: (303) 963-7200. Michael J. Beaudoin, co-CEO; Rodney Rice, co-CEO; Geoff Kulesa, VP-service prof mktg & bus devel; Craig Smith, VP-bus devel.

In-house.

Ticketmaster: 8800 Sunset Blvd., West Hollywood, Calif. 90069/Phone: (310) 360-3300. Terry R. Barnes, chmn; John Pleasants, CEO & pres; Alan Rakov, dir-strategic mktg.

No agency.

TripAdvisor: 464 Hillside Ave., Ste. 304, Needham, Mass. 02494/Phone: (781) 444-1113. Stephen Kaufer, pres & CEO; Langley Steinert, chmn.

In-house.

Zerodegrees.com: 8800 Sunset Blvd., West Hollywood, Calif. 90069/Phone: (310) 360-3457. Jas Dhillon, co-founder, pres & CEO; Peter Hutto, co-founder & VP-bus devel & mktg.

In-house.

10 Johnson & Johnson

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$314,619	\$310,879	1.2
Sunday magazine	24,530	17,875	37.2
B2B magazine	2,987	4,286	-30.3
Local magazine	.8	NA	NA
Spanish-language magazine	1,745	1,440	21.2
Newspaper	5,307	2,293	131.4
National newspaper	5,347	3,557	50.3
Spanish-language newspaper	18	17	5.9
FSI	27,698	19,896	39.2
Network TV	521,612	527,507	-1.1
Spot TV	37,005	38,657	-4.3
Syndicated TV	129,356	101,469	27.5
Cable TV network	200,736	164,310	22.2
Spanish-language TV	67,985	49,883	36.3
Network radio	18,321	15,770	16.2
National spot radio	4,871	7,166	-32.0
Outdoor	1,026	797	28.7
Internet	29,375	9,700	202.8
Measured media	1,392,546	1,275,502	9.2
Unmeasured media	783,137	686,382	14.1
Total	2,175,683	1,961,884	10.9
By brand	2004	2003	% chg
Tylenol	212,549	208,613	1.9
Ortho	179,973	85,894	109.5
Neutrogena	168,947	162,805	3.8
Aveeno	108,116	93,519	15.6
Johnson & Johnson corporate	86,676	73,685	17.6
Pepcid	66,364	58,419	13.6
Splenda	58,774	22,635	159.7
Procrit Anemia Rx	56,759	78,381	-27.6
Motrin	46,422	46,156	0.6
Remicade Rx	39,123	22,200	76.2
Onetouch	34,732	29,394	18.2

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U.S. ad spending (\$ in thousands)

By brand	2004	2003	% chg
Clean & Clear	32,347	28,587	13.2
Imodium	28,178	29,983	-6.0
St Joseph Aspirin	27,829	21,754	27.9
Acuvue	27,737	43,091	-35.6
Concerta Adhd Rx	18,731	26,731	-29.9
Carefree feminine products	17,284	10,728	61.1
RoC	15,544	12,882	20.7
Band-Aid	15,433	31,901	-51.6
Monistat	15,119	19,587	-22.8
Lactaid	13,354	16,300	-18.1
Mylanta	12,813	14,778	-13.3
Viactiv	12,076	11,375	6.2
Stayfree feminine products	11,815	17,340	-31.9
K-Y	11,632	8,885	30.9
Reach dental products	11,601	16,212	-28.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$47,348	\$41,862	13.1
Earnings	8,509	7,197	18.2
U.S.	2004	2003	% chg
Sales	27,770	25,274	9.9
Division sales	2004	2003	% chg
Pharmaceutical	22,128	19,517	13.4
Medical devices & diagnostics	16,887	14,914	13.2
Consumer	8,333	7,431	12.1

Headquarters

Johnson & Johnson/1 Johnson & Johnson Plaza, New Brunswick, N.J. 08933/Phone: (732) 524-0400.

Personnel, brands, agencies

Corporate: William C. Weldon, chmn & CEO; J. Andrea Alstrup, corp VP-adv; Dawn Jacobs, VP-adv.

KPR, New York. Miriam Slone, sr VP & dir-client svcs. — Pharmaceuticals Group Strategic Marketing (PGSM), Janssen Ortho McNeil Primary Care (JOM-PC), AP-77, AP-48, AP-58.

McCann Erickson Worldwide, New York. Carol Smith, exec VP & ww acct dir.

Universal McCann Worldwide, New York. Peggy Kelly, exec VP & global client svcs dir. — media svcs.

OMD Worldwide, New York. Elyse Hoelzer, acct dir; Jack Hanrahan, acct dir. — media buying.

R/GA, New York. Jennifer Harris, acct dir. — interactive mktg.

Centocor: 200 Great Valley Pkwy., Malvern, Pa. 19355/Phone: (610) 651-6000. Julie McHugh, pres; Scott Habig, VP-sls & mktg.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; Michael Parisi, exec VP & gm-Altum. — oncology franchise (prof), new products.

Nelson Communications Worldwide, New York. Lorraine Pastore, pres. — Remicade arthritis Rx.

OgilvyOne Worldwide, New York. Allison Womack, sr ptnr & client svcs dir-healthcare. — direct mktg.

DePuy: 700 Orthopaedic Dr., Warsaw, Ind. 46581-0988/Phone: (574) 267-8143. Diogo Moreira, US pres; Eric Dremel, VP-sls.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; David Chapman, pres-Thomas Ferguson Associates (a CommonHealth co.). — Codman 3000 & Archimedes implantable pumps (prof).

DDB Worldwide Communications, New York. Gord Desveaux, exec VP & dir-strategic plng. — Codman, DePuy Orthopaedics.

Ethicon: Route 22 West, Somerville, N.J. 08876/Phone: (908) 218-0707. Rodrigo Bianchi, ww pres-Ethicon Products; Robert Coradini, ww pres-Cardiovations; Dan Wildman, ww pres-J&J Wound Management; Barbara Schwartz, ww pres-Gynecare.

Regan Campbell Ward, New York. Maureen Regan, mg ptnr. — Sutures, Thermachoice, VT.

J&J/Merck Consumer Pharmaceuticals Co.: 7050 Camp Hill Rd., Ft. Washington, Pa. 19034-2292/Phone: (215) 233-7700. Renaat Van den Hooff, ww pres.

Alchemy, New York. Rich Pounder, pres. — Mylanta, Mylicon, Mevacor, Pepcid.

Conill, New York. Carla Poumian-Ruiz, acct dir. — Hispanic adv, Mylanta, Pepcid.

Janssen Pharmaceutica Products: 1125 Trenton-Harbourton Rd., Titusville, N.J. 08560-0200/Phone: (609) 730-2000. R. Suehnholz, VP-new bus devel; Jeff Smith, pres-Janssen Ortho-McNeil Primary Care.

KPR, New York. Madeleine Gold, sr VP & assoc dir client svcs; — Paliperidone, Risperdal.

Torre Lazur McCann Healthcare Worldwide, Parsippany, N.J. Beverly Breitenbach, pres. — Aciphex.

Johnson & Johnson Consumer Products Co.: 199 Grandview Rd., Skillman, N.J. 08558/Phone: (908) 874-1000. Colleen Goggins, ww chmn-cons & personal care grp; Sharon D'Agostino, global pres-skinicare; Sherilyn McCoy, pres-baby/kids & wound care.

Alchemy, New York. Rich Pounder, pres. — Cortaid, Balmex.

DDB Worldwide Communications, New York & Chicago. Ben Arno, grp acct dir. — Aveeno, Clean & Clear, Purpose, RoC, Shower to Shower.

Lowe Worldwide, New York. Peter Leinroth, exec VP & ww client dir. — Johnson's Baby Products.

McCann Erickson Worldwide, New York. Carol Smith, exec VP & ww acct dir. — Band-Aid bandages.

Universal McCann Worldwide, New York. Peggy Kelly, exec VP & global client svcs dir. — media svcs, Reach, Monistat, KY, Stayfree, Bandaid.

Casanova Pendrill Publicidad, Costa Mesa, Calif. Allen Payano, acct dir. — Hispanic adv, Band-Aid bandages, Johnson's Baby Products.

Del Rivero Messianu DDB, Coral Gables, Fla. Carola Chuarero, . — Hispanic adv, Clean & Clear.

Tribal DDB, New York. Matt Freeman, CEO. — interactive mktg, Clean & Clear.

LifeScan: 1000 Gibraltar Dr., Milpitas, Calif. 95035/Phone: (408) 263-9789. Eric Milledge, grp chmn; Peter Luther, pres; Niamh Pellegrini, VP-mktg.

DDB Worldwide Communications, New York. Gord Desveaux, exec VP & dir-strategic plng. — OneTouch diabetes testing prods.

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McNeil Consumer & Specialty Pharmaceuticals/Nutritionals

Worldwide: 7050 Camp Hill Rd., Fort Washington, Pa. 19034-2210/Phone: (215) 273-7000. Colin Watts, pres-Consumer & Specialty Pharmaceuticals; Deb Sandler, gm-Nutritionals; Ashley McEvoy, VP-mktg; Brenda S. Bass, VP-sls.

Universal McCann Worldwide, New York. Peggy Kelly, exec VP & global client svcs dir. — Tylenol, St. Josephs, Imodium, Motrin, Pepcid, Spenda, Viactiv, Carefree, ob & other OTC.

Alchemy, New York. Rich Pounder, pres. — Imodium, Motrin, Simply Stuff, Simply Cough, Splenda.

Deutsch, New York. Val DiFebo, mg ptrn & gm. — St. Joseph aspirin, Tylenol prods, Ortho Evra.

Conill, New York. Carla Poumian-Ruiz, acct dir. — Hispanic adv, Imodium, Motrin, Tylenol.

McNeil Nutritionals: 601 Office Center Dr., Fort Washington, Pa. 19034. Deb Sandler, gm-Nutritionals.

Alchemy, New York. Rich Pounder, pres. — Benecol, Lactaid, Splenda, Viactiv.

Neutrogena Corp.: 5760 W. 96th St., Los Angeles, Calif. 90045/Phone: (310) 642-1150. Jan Hall, pres-N. Amer.; Anne Sawbridge, VP-mktg.

DDB Worldwide Communications, New York & Chicago. Ben Arno, grp acct dir. — Neutrogena skin care prods.

Del Rivero Messianu DDB, Coral Gables, Fla. Sylvia Curran, . — Hispanic adv.

Tribal DDB, New York. Matt Freeman, CEO. — interactive mktg.

Ortho Biotech Products: 430 Route #22 East, P.O. Box 6914, Bridgewater, N.J. 08807-0914/Phone: (908) 541-4000. John Johnson, grp chmn; Barry Fitzsimons, VP-new bus devel.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; David Chapman, exec VP & gm-Althun. — prof: Doxil (Tibotec), Eprex, Procrit, Zarnestra (Tibotec).

DDB Worldwide Communications, New York. Gord Desveaux, exec VP & dir-strategic plng. — Procrit anemia Rx.

OgilvyOne Worldwide, New York. Allison Womack, sr ptrn & client svcs dir-healthcare. — direct mktg.

Ortho-McNeil Pharmaceutical: 1000 Route #202 South, Raritan, N.J. 08869/Phone: (908) 218-6000. Seth Fischer, grp chmn.

Alchemy, New York. Rich Pounder, pres. — Ditropan XL, Elmiron, Ortho Evra, Ortho Tri-Cyclen Lo, Topamax, Ultracet.

CommonHealth, Wayne & Parsippany, N.J. Matt Giegerich, pres & CEO; Guy Dess, pres-Adient (a CommonHealth co.); David Chapman, pres-Ferguson (a CommonHealth co.); Nancy Barlow, pres-X-change (a CommonHealth co.); Stu Klein, pres-Quantum (a CommonHealth co.). — prof: Levaquin, Levaquin IV, Ortho-Evra, Ortho Tri-Cyclen Lo, Retin-A Micro, Topamax.

Casanova Pendrill Publicidad, Costa Mesa, Calif. Caroline Buenrostro, acct exec; Fernando Garcia, acct dir. — Hispanic adv, Ortho Evra.

Personal Products Co.: 199 Granview Rd., Skillman, N.J. 08558-9418/Phone: (908) 874-1000. Robert Kirby, pres; James Peterson, VP-mktg.

Lowe Worldwide, New York. Peter Leinroth, exec VP & ww client dir.

McCann Erickson Worldwide, New York. Carol Smith, exec VP & ww acct dir. — K-Y lubricants, Monistat, Reach dental prods.

Vistakon (Div. of Johnson & Johnson Vision Care): 7500 Centurion Pkwy., Jacksonville, Fla. 32256/Phone: (904) 443-1000. Naomi Kelman, pres-N. Amer.; Peter Valenti, VP-mktg.

McCann Erickson Worldwide, New York. Carol Smith, exec VP & ww acct dir. — Acuvue contact lenses.

Universal McCann Worldwide, New York. Peggy Kelly, exec VP & global client svcs dir. — media svcs.

75 SC Johnson

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$25,551	\$26,591	-3.9
Sunday magazine	3,160	4,195	-24.7
B2B magazine	404	518	-22.0
Spanish-language magazine	NA	167	NA
Newspaper	5	46	-89.1
Spanish-language newspaper	6	NA	NA
FSI	42,190	43,518	-3.1
Network TV	199,623	153,609	30.0
Spot TV	20,565	16,156	27.3
Syndicated TV	45,007	20,967	114.7
Cable TV network	83,586	46,638	79.2
Spanish-language TV	2,630	5,300	-50.4
Network radio	1,322	NA	NA
National spot radio	1,179	606	94.6
Internet	94	1	NA
Measured media	425,322	318,312	33.6
Unmeasured media	85,520	48,080	77.9
Total	510,842	366,392	39.4

By brand	2004	2003	% chg
Glade	93,797	58,997	59.0
Oust Air Sanitizer	68,658	32,774	109.5
Ziploc	46,367	28,336	63.6
Scrubbing Bubbles	38,856	4,242	815.9
Windex	32,515	27,623	17.7
Pledge Furniture Cleaners	23,341	36,242	-35.6
OFF Bug Spray	15,366	13,125	17.1
Drano	15,030	8,649	73.8
Shout Stain Remover	10,301	11,132	-7.5

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$5,500	\$5,370	2.4

Headquarters

SC Johnson/1525 Howe St., Racine, Wis. 53403-2236/Phone: (262) 260-2000.

Personnel, brands, agencies

Corporate: Dr. H. Fisk Johnson, chmn & CEO; David L. May, pres-N. Amer.; Ralph D. Perry, VP-air care & Canadian opers; Greg Barron, VP-new prods, N. Amer.; Pat Penman, dir-mktg svcs; Miguel A. de Garcia, gm-Puerto Rico & Caribbean; Stephane Reverdy, global sales dir & American region sales dir.

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Footo Cone & Belding Worldwide, Chicago. Mark Pacchini, exec VP-ww grp acct dir & pres; Mark Modesto, exec VP-ww grp acct dir & pres. — Drano, Edge, Fantastik, Glade, Grab-It, OFF!, Oust, Pledge, Raid, Saran, Scrubbing Bubbles, Shout, Skintimate, Vanish, Windex, Ziploc.

Initiative Media Worldwide, New York. Larry Orell, exec VP & gm. — media buying.

R/GA, New York. Michelle Mora, acct dir. — interactive & relationship mktg, new prods & cons awareness.

56 Kellogg Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$87,643	\$85,196	2.9
Sunday magazine	6,140	8,703	-29.4
B2B magazine	1,872	2,305	-18.8
Local magazine	3	18	-83.3
Spanish-language magazine	966	120	705.0
Newspaper	82	1,310	-93.7
Spanish-language newspaper	NA	2	NA
FSI	15,153	14,120	7.3
Network TV	111,974	95,894	16.8
Spot TV	12,487	12,634	-1.2
Syndicated TV	59,837	48,010	24.6
Cable TV network	109,712	92,765	18.3
Spanish-language TV	22,233	20,468	8.6
Network radio	160	1,206	-86.7
National spot radio	3,197	2,157	48.2
Outdoor	NA	458	NA
Internet	8,588	3,543	142.4
Measured media	440,047	388,909	13.1
Unmeasured media	207,050	187,689	10.3
Total	647,097	576,598	12.2
By brand	2004	2003	% chg
Kellogg	319,929	282,042	13.4
Sunshine Cheez-It	32,435	23,870	35.9
Kashi	26,939	15,973	68.7
Eggo	18,639	15,927	17.0
Keebler	12,932	35,585	-63.7

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$9,614	\$8,812	9.1
Earnings	891	787	13.2
U.S.	2004	2003	% chg
Sales	5,968	5,608	6.4
Division sales	2004	2003	% chg
North America	6,369	5,954	7.0
Europe	2,007	1,734	15.7
Latin America	718	667	7.6
Asia Pacific	519	456	13.8

Headquarters

Kellogg Co./1 Kellogg Square, P.O. Box 3599, Battle Creek, Mich. 49016/Phone: (269) 961-2000.

Personnel, brands, agencies

Corporate: James Jenness, chmn & CEO; David A. Mackay, pres, dir & chief ops officer; Alan Harris, exec VP-chief mktg & customer officer.

Kellogg Snacks Division: 1 Kellogg Square, Battle Creek, Mich. 49016/Phone: (616) 961-2000. Brad Davidson, pres; Tim Goaley, sr VP-ops.

Leo Burnett Worldwide, Chicago. Clive Sirkin, grp mg dir, Leo Burnett ww; Ted O'Brien, intl acct dir; John Sheehy, exec VP & acct dir. — Keebler cookies & crackers, Nutri-Grain cereal bars, Rice Krispie Treats, Cheez-It, Special K Bars, Cereal and Milk Bars.

Starcom USA, Chicago. Ken Taylor, media dir. — media svcs.

Morning Foods Division: 1 Kellogg Square, Battle Creek, Mich. 49016/Phone: (616) 961-2000. Paul Norman, pres; Mark Baynes, VP-mktg.

Leo Burnett Worldwide, Chicago. Clive Sirkin, grp mg dir-Leo Burnett ww; John Sheehy, exec VP & acct dir. — All Bran cereals, Apple Jacks, Banana Corn Flakes, Cocoa Rice Krispies, Corn Flakes, Corn Pops, Cracklin' Oat Bran, Crispix, Disney Cereals, Disney Fruit Snacks, Froot Loops, Frosted Flakes, Fruit Harvest Cereal, Krave Bars, Maple and Brown Sugar Mini-Wheats, Mini-Wheats, Pop-tarts, Raisin Bran Crunch, Rice Krispies, Smart Start, Special K, Special K Red Berries, Special K Vanilla Almond, Special K for a Low Carb Lifestyle, Smorz, Spongebob, Tony's Cinnamon Crunchers, Twistables.

Starcom USA, Chicago. Ken Taylor, media dir. — media svcs.

Lapiz, Chicago. Miguel Paloma, acct super. — Hispanic adv, Frosted Flakes, Froot Loops, Fruit Twistables, Pop Tarts, Special K, Fruit Harvest, Corn Flakes w/Banana.

Natural & Frozen Foods Division: 1 Kellogg Square, Battle Creek, Mich. 49016/Phone: (616) 961-2000. Blaine McPeak, VP & gm.

Leo Burnett Worldwide, Chicago. Clive Sirkin, exec VP & grp mg dir; John Sheehy, exec VP & acct dir. — Eggo waffles, Morningstar Farms.

Starcom USA, Chicago. Ken Taylor, media dir. — media svcs.

Lapiz, Chicago. Miguel Paloma, acct super. — Hispanic adv.

97 Kia Motors Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$22,540	\$36,307	-37.9
B2B magazine	58	90	-35.6
Spanish-language magazine	NA	99	NA
Newspaper	420	7,552	-94.4
National newspaper	1,801	181	895.0
Spanish-language newspaper	1	8	-87.5
Network TV	81,063	94,771	-14.5
Spot TV	28,743	25,208	14.0
Syndicated TV	32,012	15,144	111.4
Cable TV network	60,320	58,078	3.9
Spanish-language TV	10,093	8,631	16.9
Network radio	7,151	2,124	236.7
National spot radio	1,138	NA	NA

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Outdoor	1,775	1,084	63.7
Internet	1,751	1,251	40.0
Measured media	248,866	250,528	-0.7
Unmeasured media	106,656	97,428	9.5
Total	355,522	347,956	2.2
By brand	2004	2003	% chg
Kia	248,865	250,528	-0.7

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$13,416	\$10,774	24.5
Earnings	.607	.646	-6.0
North America	2004	2003	% chg
Sales	4,387	3,131	40.1

Headquarters

Kia Motors Corp./231 Yangjae-dong, Seocho-gu, Seoul, South Korea /Phone: 82-2-3464-1114.

Kia Motors America, 9801 Muirlands Blvd., Irvine, Calif. 92618/Phone: (949) 470-7000.

Notes

Kia Motors Corp. is 39% owned by Hyundai Motor Co., another 100 Leading National Advertisers company. In late 2004 Davidandgoliath, Los Angeles successfully defended the Kia account, and early this year Kia awarded its Hispanic advertising account to Al Punto, Tustin, Calif.

Personnel, brands, agencies

Corporate: Mong-Koo Chung, chmn; Ik-Hwan Kim, pres & CEO; Eui-Sun Chung, pres & CEO.

Kia Motors America: 9801 Muirlands Blvd., Irvine, Calif. 92618/Phone: (949) 470-7000. Peter M. Butterfield, pres & CEO; Ian Beavis, VP-mktg; Phil Kelley, VP-sls; Tim Chaney, dir-mktg.

Davidandgoliath, Los Angeles. Mike Dillon, acct dir. — Kia vehicles.

World Marketing Group, Irvine, Calif. Kristin Lopez, dir-media plng. — media svcs.

Al Punto, Tustin, Calif.. Carlos Arambula, dir-client svcs. — Hispanic adv.

99 Kimberly-Clark Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$93,860	\$81,015	15.9
Sunday magazine	6,825	7,423	-8.1
B2B magazine	.486	.375	29.6
Spanish-language magazine	.489	.654	-25.2
Newspaper	.6	.61	-90.2
FSI	21,791	21,675	0.5
Network TV	73,382	88,547	-17.1
Spot TV	4,584	9,976	-54.0
Syndicated TV	12,378	3,510	252.6
Cable TV network	38,073	43,359	-12.2

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Spanish-language TV	8,672	8,334	4.1
Network radio	3,614	3,758	-3.8
National spot radio	.137	.99	38.4
Internet	3,632	7,473	-51.4
Measured media	267,929	276,259	-3.0
Unmeasured media	73,928	74,993	-1.4
Total	341,857	351,252	-2.7
By brand	2004	2003	% chg
Huggies	71,728	68,593	4.6
Kleenex	44,577	39,502	12.8
Kotex	30,326	17,009	78.3
Cottonelle	27,014	37,376	-27.7
Pull-Ups Disposable Pants	16,886	21,933	-23.0
Poise Bladder Control	15,967	8,750	82.5
Goodnites Disposable Pants	12,934	10,358	24.9
Depends	10,972	7,568	45.0

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$15,083	\$14,026	7.5
Earnings	1,800	1,694	6.3
North America	2004	2003	% chg
Sales	8,748	8,657	1.1
Division sales	2004	2003	% chg
Personal care	5,882	5,442	8.1
Consumer tissue	5,279	5,258	0.4
Business-to-Business	3,922	3,801	3.2

Headquarters

Kimberly-Clark Corp./351 Phelps Dr., Irving, Texas 75038/Phone: (972) 281-1200.

Personnel, brands, agencies

Corporate: Thomas J. Falk, chmn & CEO.

Childcare Sector: 2 Neenah Center, Neenah, Wis. 54956/Phone: (920) 721-2000. Robert D. Thibault, pres.

Ogilvy & Mather Worldwide, New York. Laurel Ritchie, exec grp dir. — Goodnites, Little Swimmers, Pull-Ups.

MindShare Worldwide, New York. Dave Rasmussen, sr ptmr, grp plng dir. — media plng.

Family Care Sector: K-C West, 2300 Winchester Rd., Neenah, Wis. 54956/Phone: (920) 721-2000. Dan Smith, pres-North Atlantic Family Care.

JWT, New York. Hildie Neuman, global bus dir. — Cottonelle Bath Tissue, Cottonelle Fresh Rollwipes, Kleenex ColdCare, Kleenex Cottonelle, Kleenex, Kleenex Softique, Kleenex Ultra, Scott Bath Tissue, Scott Napkins, Scott Paper Towels, Viva Paper Towels.

MindShare Worldwide, Chicago. Dave Rasmussen, sr ptmr, grp plng dir. — media plng.

Feminine Care/Adult Care Sector: 2001 Marathon Ave., Neenah, Wis. 54956/Phone: (920) 721-2000. Tim Lehman, pres.

Ogilvy & Mather Worldwide, Chicago. Kim Isele, mg super. — Depend, Poise.

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MindShare Worldwide, Chicago. Dave Rasmussen, sr ptnr, grp plng dir. — media plng.

Infant Care Sector: K-C West, 2100 Winchester Rd., Neenah, Wis. 54956/Phone: (920) 721-2000. Bruce Paynter, pres-baby care & wipes.

Ogilvy & Mather Worldwide, New York. Laurel Ritchie, exec grp dir. — Huggies diapers, Huggies baby wipes.

MindShare Worldwide, New York. Dave Rasmussen, sr ptnr, grp plng dir. — media buying.

70 Kohl's Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$19,187	\$18,901	1.5
B2B magazine	147	162	-9.3
Newspaper	97,845	87,358	12.0
National newspaper	8,979	8,559	4.9
Spanish-language newspaper	79	303	-73.9
FSI	2	2	0.0
Network TV	104,640	65,762	59.1
Spot TV	48,437	62,463	-22.5
Cable TV network	27,806	24,709	12.5
Network radio	16,043	13,704	17.1
National spot radio	11,576	9,674	19.7
Outdoor	739	1,274	-42.0
Internet	124	191	-35.1
Measured media	335,604	293,062	14.5
Unmeasured media	197,097	177,639	11.0
Total	532,701	470,701	13.2
By brand	2004	2003	% chg
Kohl's	335,601	292,923	14.6

Sales & earnings (\$ in millions)

Worldwide & U.S.	2004	2003	% chg
Sales	\$11,701	\$10,282	13.8
Earnings	730	581	25.6

Headquarters

Kohl's Corp./N56 W17000 Ridgewood Dr., Menomonee Falls, Wis. 53051-5660/Phone: (262) 703-7000.

Personnel, brands, agencies

Corporate: Larry Montgomery, chmn & CEO; Kevin Mansell, pres; Gary Vasques, exec VP-mktg; Julie Gardner, sr VP-mktg.

McCann Erickson Worldwide, New York. Ginny Shiverdecker, exec VP & grp mg dir.

Universal McCann Worldwide, New York. Coleen Campbell, sr VP & grp media dir. — media svcs.

Casanova Pendrill Publicidad, Costa Mesa, Calif. Desiree Lewek, acct dir. — Hispanic adv.

53 Kroger Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$543	\$625	-13.1
B2B magazine	84	51	64.7

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Local magazine	89	103	-13.6
Newspaper	80,688	75,089	7.5
Spanish-language newspaper	988	299	230.4
FSI	2,590	2,435	6.4
Network TV	386	NA	NA
Spot TV	34,918	32,312	8.1
Cable TV network	1,614	19	NA
Spanish-language TV	NA	6	NA
Network radio	100	NA	NA
National spot radio	68	287	-76.3
Outdoor	4,460	2,381	87.3
Internet	209	132	58.3
Measured media	126,737	113,739	11.4
Unmeasured media	559,378	540,988	3.4
Total	686,115	654,727	4.8
By brand	2004	2003	% chg
Kroger	58,801	54,302	8.3
Ralph's	24,135	22,088	9.3
Fred Meyer	19,137	13,339	43.5

Sales & earnings (\$ in millions)

Worldwide & U.S.	2004	2003	% chg
Sales	\$56,434	\$53,791	4.9
Earnings	-100	312	NA

Headquarters

Kroger Co./1014 Vine St., Cincinnati, Ohio 45202-1100/Phone: (513) 762-4000.

Personnel, brands, agencies

Corporate: David B. Dillon, chmn & CEO.

Atlanta Division: 2175 Park Lake Dr., Ste. 300, Atlanta, Ga. 30345/Phone: (770) 496-7522. Bruce A. Lucia, pres; Kathy Stratton, adv mgr.

JA&G Advertising, Cincinnati. Sam Gingrich, CEO; Steve Jagers, pres; Walt Adamkosky, exec VP & creative dir; Mary Ellen Starling, VP-media.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Kristy Calman, acct dir; Doris Irwin, media planner/buyer. — media buying.

Central Division: 5960 Castleway West Dr., Indianapolis, Ind. 46250/Phone: (317) 579-8100. Lisa E. Holsclaw, pres; Mike Newsom, adv mgr; Charlene Ward, assoc adv mgr.

JA&G Advertising, Cincinnati. Sam Gingrich, CEO; Steve Jagers, pres; Walt Adamkosky, exec VP & creative dir; Nanci Albrecht, sr VP. — Kroger.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super. — media buying.

Cincinnati/Dayton Division: P.O. Box 46234, Cincinnati, Ohio 45246/Phone: (513) 782-3300. Geoffrey Covert, pres; Amy Schulten, adv mgr; Paul Greulich, asst adv mgr.

JA&G Advertising, Cincinnati. Sam Gingrich, CEO; Steve Jagers, pres; Walt Adamkosky, exec VP & creative dir; Mary Ellen Starling, VP-media.

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Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Doris Irwin, media planner/buyer. — media buying.

City Market: 105 W. Colorado Ave., Grand Junction, Colo. 81510/Phone: (970) 241-0750. Phyllis Norris, pres; Dan Grassmeyer, dir-adv.

CB&S Advertising Agency (In-house).

Delta Division: P.O. Box 1878, 800 Ridge Lake Blvd., Memphis, Tenn. 3819/Phone: (901) 765-4100. Richard Tillman, pres; David Chadwick, adv mgr; Whitney Atkins, assoc adv mgr.

JA&G Advertising, Cincinnati. Sam Gingrich, CEO; Steve Jagers, pres.; Walt Adamkosky, exec VP & creative dir; Mary Ellen Starling, media dir.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Doris Irwin, media planner/buyer. — media buying.

Dillon Companies: 2700 E. 4th St., P.O. Box 1608, Hutchinson, Kan. 67501-1608/Phone: (620) 665-5511. John Bays, pres; Su-Ella McKinzie, dir-adv.

CB&S Advertising Agency (In-house). — media buying.

Food 4 Less/Foods Co.: 1100 W. Artesia Blvd., Compton, Calif. 90220/Phone: (310) 884-9000. Jay Cummins, pres; Bob McKee, sr VP-sls & mktg.

Heil-Brice Retail Advertising, Newport Beach, Calif. Danielle Kennedy, acct dir.

Fred Meyer Stores: 3800 S.E. 22nd St., P.O. Box 42121, Portland, Ore. 97202/Phone: (503) 232-8844. Darrell Webb, pres; Ross Thomas, VP-sls promo & mktg.

CB&S Advertising Agency (In-house). — Fred Meyer.

Fry's Food & Drug Stores: P.O. Box 1043, Tolleson, Ariz. 85353/Phone: (623) 936-2100. Michael J. Donnelly, pres; Rick Gibb, dir-adv.

CB&S Advertising Agency (In-house).

Great Lakes Division: 4111 Executive Pkwy., Westerville, Ohio 43081-6187/Phone: (614) 898-3235. Bruce A. Macaulay, pres; Dale Hollandsworth, adv mgr.

Fahlgren, Columbus, Ohio. Wendy Kramer, VP.

Active International, New York. Concetta Lombardi, acct dir. — media buying.

Jay C Food Stores: 900 A Ave., Seymour, Ind. 47274/Phone: (812) 522-1374. Paul Bowen, pres; Mark Combs, exec dir-mktg; Steve Ferrell, adv mg.

In-house.

King Soopers: 65 Tejon St., Denver, Colo. 80217/Phone: (303) 778-3100. Russ Dispense, pres; Dan Grassmeyer, dir-adv.

CB&S Advertising Agency (In-house).

Loaf N' Jug: 442 Keeler Pkwy., Pueblo, Calif. 81001/Phone: (719) 948-3071. Art Stawski, pres; Curtis Rolland, sr VP; Andy Krance, VP-ops; Stacey Duston, adv mgr; Russ Drury, VP-mktg; Frank Provenza, mktg plus.

GSP Marketing Services, Denver. Brian Dirks, regional sls mgr. — POP.

Mid-Atlantic Division: P.O. Box 14002, 3631 Peters Creek Rd. NW, Roanoke, Va. 24019-4002/Phone: (540) 563-3500. R. Pete Williams, pres; Carl York, adv mgr.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super. — media buying, broadcast.

Fahlgren, Parkersburg, W. Va. Andrea Brock, VP media dir. — special projects, outdoor adv.

Mid-South Division: P.O. Box 32680, Louisville, Ky. 40232-2680/Phone: (502) 423-4800. John P. Hackett, pres; Ben Harper, adv mgr; Judy Mallow, asst adv mgr.

Sheehy & Associates, Louisville, Ky. Scott Kuhn, acct super; Doris Irwin, media planner/buyer. — TV creative & media buying.

Quality Food Centers: 10116 NE 8th St., Bellevue, Wash. 98004/Phone: (425) 455-3761. Donna F. Giordano, pres; Dean Olson, dir-adv.

CB&S Advertising Agency (In-house).

Quik Stop Markets: 4567 Enterprise St., Fremont, Calif. 94538/Phone: (510) 657-8500. Van Tarver, pres.

In-house.

Ralph's Grocery Co.: 1100 W. Artesia Blvd., Compton, Calif. 90220/Phone: (310) 884-9000. Dave Hirz, pres-Ralph's supermarkets; Kay Garbizo, VP-adv; Chuck Ackerman, sr VP-sls & mktg.

Heil-Brice Retail Advertising, Newport Beach, Calif. Jon Boudavos, acct dir.

CB&S Advertising Agency (In-house).

Smith's Food & Drug Centers: 1550 S. Redwood Rd., Salt Lake City, Utah 84104/Phone: (801) 974-1400. Jim Hallsey, CEO; Dirk Burningham, adv mgr.

CB&S Advertising Agency (In-house). — TV. Radio.

In-house. — print.

Southwest Division: 16770 Imperial Valley Dr., Ste. 200, Houston, Texas 77060-3406/Phone: (713) 507-4800. William H. Breetz Jr, pres; Kirk Douthit, customer mktg mgr.

CB&S Advertising Agency (In-house). — print creative & media svcs.

Tom Thumb Food Stores: 619 8th Ave., Crestview, Fla. 32536-0847/Phone: (850) 682-5171. Mark Salisbury, pres; Shawn Cromack, VP-mktg.

Appleyard Advertising, Pensacola, Fla. Nancy Thurman, acct dir.

30 Estee Lauder Cos.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$134,731	\$124,332	8.4
Sunday magazine	3,526	3,628	-2.8
B2B magazine	744	471	58.0
Local magazine	547	475	15.2

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Spanish-language magazine	1,735	3,815	-54.5
Newspaper	124	552	-77.5
National newspaper	1,580	1,109	42.5
Spanish-language newspaper	2	NA	NA
Spot TV	26,093	22,919	13.8
Syndicated TV	8	64	-87.5
Cable TV network	365	182	100.5
Spanish-language TV	522	NA	NA
Network radio	1	NA	NA
National spot radio	236	1,210	-80.5
Outdoor	560	641	-12.6
Internet	372	180	106.7
Measured media	171,146	159,578	7.2
Unmeasured media	885,847	825,970	7.2
Total	1,056,993	985,548	7.2
By brand	2004	2003	% chg
Clinique	46,964	39,335	19.4
Estee Lauder	43,824	47,075	-6.9
Beyond Paradise Fragrance	22,312	15,457	44.3
Aveda	10,386	9,719	6.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$5,790	\$5,096	13.6
Earnings	342	320	6.9
Americas	2004	2003	% chg
Sales	3,149	2,932	7.4
Americas operating income	319	255	25.1
Division sales	2004	2003	% chg
Makeup	2,148	1,888	13.8
Skin Care	2,140	1,894	13.0
Fragrance	1,221	1,060	15.2
Hair Care	249	229	8.7
Other	32	26	23.1

Headquarters

Estee Lauder Cos./767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-4200.

Personnel, brands, agencies

Corporate: Leonard A. Lauder, chmn; Fred H. Langhammer, chmn-global affairs; William P. Lauder, pres & CEO; Dan Brestle, chief operating officer; Patrick Bousquet-Chavanne, grp pres; Philip Shearer, grp pres; Cedric Prouve, grp pres-intl; Sally Susman, sr VP-global comms.

In-house. — corporate adv.

MindShare Worldwide, New York. Carla Loffredo, pres & chief operating officer. — media svcs.

Aramis & Designer Fragrance Brands: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-3700. Fabrice Weber, pres; Veronique Gabai-Pinsky, sr VP & gm; Carol Russo, sr VP-sls & mktg, N. Amer.; Stephanie Benedetti, VP-mktg, N. Amer.; Robin Mason, VP-global mktg; de Guise Vaillancourt, exec dir-global mktg; Diane Kim, VP-global mktg, Donna Karan; Justin Boxford, exec dir-global mktg, Michael Kors.

In-house.

Aveda Corp.: 4000 Pheasant Ridge Dr. NE, Blaine, Minn. 55449/Phone: (763) 783-4000. Dominique Conseil, pres; Chris Molinari, VP-global comms; Chris Hacker, sr VP-global mktg & design; Mark O'Berski, VP-cons mktg; Rachel Ostrom, dir-adv.

In-house.

Bobbi Brown Professional Cosmetics: 575 Broadway, 4th Fl., New York, N.Y. 10012/Phone: (646) 613-6500. Maureen Case, pres; Rita Mangan, sr VP & natl sls mgr; Stephanie Longworth, exec dir-global mktg.

In-house.

Clinique Laboratories: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-3800. Beth Di Nardo, sr VP-global mktg; Julie Berman, VP-global comms; Tim Convery, sr VP & creative dir ww; Celeste Lalicata, dir-adv.

In-house.

Estee Lauder: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-4200. Andrea Robinson, chief mktg officer; Aerin Lauder, sr VP-global creative directions; Geri Schachner, VP-global comms.

In-house.

JWT, New York. David Lamb, global bus dir.

M.A.C.: 130 Prince St. 2nd Fl., New York, NY 10012/Phone: (212) 965-6300. John Demsey, pres; Caroline Geerlings, sr VP-mktg; James Gager, sr VP-creative.

In-house.

Origins Natural Resources: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-4100. Daria Myers, pres; Joellen Bradford, VP-global mktg; Anelle Miller, sr VP-art & design.

In-house.

Specialty Group: 767 Fifth Ave., New York, N.Y. 10153/Phone: (212) 572-4200. Lynne Greene, pres; Mindy Grimes, sr VP-sls & mktg, Jo Malone & La Mer; Cece Coffin, VP-global comms; Elana Drell Szyfer, VP-global mktg, Prescriptives; Tracy Orr, VP-global comms, Prescriptives.

In-house.

62 Eli Lilly & Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$43,676	\$30,550	43.0
Sunday magazine	2,645	4,692	-43.6
B2B magazine	2,089	1,460	43.1
Newspaper	2,525	52	NA
National newspaper	1,646	308	434.4
Spanish-language newspaper	35	11	218.2
Network TV	105,671	14,148	646.9
Spot TV	2,650	1,224	116.5
Syndicated TV	29,309	8,444	247.1
Cable TV network	40,029	13,645	193.4
Network radio	3,279	NA	NA
National spot radio	550	546	0.7
Outdoor	109	159	-31.4

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By media	2004	2003	% chg
Internet	6,388	1,066	499.2
Measured media	240,601	76,305	215.3
Unmeasured media	346,228	114,457	202.5
Total	586,829	190,762	207.6
By brand	2004	2003	% chg
Cialis	163,303	10	NA
Strattera	66,683	61,830	7.8

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$13,858	\$12,582	10.1
Earnings	1,810	2,561	-29.3
U.S.	2004	2003	% chg
Sales	7,668	7,222	6.2
Division sales	2004	2003	% chg
Neurosciences	6,052	5,555	8.9
Endocrinology	4,291	3,927	9.3
Oncology	1,366	1,040	31.3
Animal Health	799	727	9.9
Cardiovascular	659	669	-1.5
Anti-infectives	478	489	-2.2
Other pharmaceutical	213	175	21.7

Headquarters

Eli Lilly & Co./Lilly Corporate Center, Indianapolis, Ind. 46285/Phone: 317-276-2000.

Personnel, brands, agencies

Corporate: Sidney Taurel, chmn, pres & CEO; Steven R. Plump, VP-global mktg & sls.

Footnote Cone & Belding Worldwide, New York. Phyllis Schneble, sr VP & grp mgr. — Strattera, Cymbalta.

Abelson-Taylor, Chicago. Greg Niemczyk, VP & acct dir. — Cialis, Byetta, Exenatide.

Grey Worldwide, New York. — Cialis.

87 Limited Brands

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$15,647	\$22,109	-29.2
Sunday magazine	160	572	-72.0
B2B magazine	129	92	40.2
Local magazine	206	NA	NA
Spanish-language magazine	7	NA	NA
Newspaper	705	482	46.3
National newspaper	311	538	-42.2
Network TV	45,598	49,370	-7.6
Spot TV	2,086	2,716	-23.2
Syndicated TV	6,970	6,021	15.8
Cable TV network	9,222	5,486	68.1
Network radio	86	301	-71.4
National spot radio	114	261	-56.3
Outdoor	1,506	160	841.3
Internet	7,244	5,665	27.9
Measured media	89,991	93,773	-4.0
Unmeasured media	308,507	281,316	9.7
Total	398,498	375,089	6.2

By brand	2004	2003	% chg
Victorias Secret	62,499	81,666	-23.5

Sales & earnings (\$ in millions)

Worldwide & U.S.	2004	2003	% chg
Sales	\$9,408	\$8,934	5.3
Earnings	705	717	-1.7
Division sales	2004	2003	% chg
Victoria's Secret	4,232	3,817	10.9
Apparel	2,490	2,697	-7.7
Bath & Body Works	2,169	1,934	12.2
Other	517	486	6.4

Headquarters

Limited Brands/3 Limited Pkwy., Columbus, Ohio 43230/Phone: (614) 415-7000.

Personnel, brands, agencies

Corporate: Leslie H. Wexner, CEO & chmn; Len Schlesinger, co-chmn & chief operating officer; Edward G. Razek, pres-brand & creative svcs & chief mktg officer; Jill Beraud, exec VP-brand & creative svcs; Pattie Glod, VP-mktg & media.

In-house. — corporate adv

Initiative Media Worldwide, New York. Tim Spengler, VP & dir-natl bdcast. — media buying.

Media Kitchen, New York. Heather Dumfrod, assoc media strategist. — media svcs.

Bath & Body Works: 7 Limited Pkwy., Reynoldsburg, Ohio 43068/Phone: (614) 856-6000. Neil Fiske, CEO; Brian Beitler, VP-mktg.

In-house.

Express-Express Men's: 1 Limited Pkwy., Columbus, Ohio 43230/Phone: (614) 415-4000. Paul Raffin, pres.

In-house. — Express clothing stores.

Henri Bendel: 712 Fifth Ave., New York, N.Y. 10019/Phone: (212) 247-1100. Teril Turner, dir-mktg svcs.

In-house.

Limited Stores: 3 Limited Pkwy., Columbus, Ohio 43230/Phone: (614) 415-2000. Stuart DeHaan, dir-creative.

In-house.

Victoria's Secret Beauty: 888 Seventh Ave., New York, N.Y. 10106/Phone: (212) 904-7200. Jill Granoff, co-pres & chief operating officer; Christine Beauchamp, co-pres & gm-merchandise; Marcia Mossack, sr VP & chief creative officer.

In-house.

Victoria's Secret Direct: 1114 Ave. of the Americas, New York, N.Y. 10036/Phone: (614) 337-5000. Sharen Turney, pres & CEO.

In-house.

Victoria's Secret Stores: 4 Limited Pkwy., Reynoldsburg, Ohio 43068/Phone: (614) 577-7000. Grace Nichols, pres & CEO; Elisabeth Charles, exec VP-mktg.

In-house. — Victoria's Secret women's apparel.

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19 L'Oreal

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$328,622	\$281,077	16.9
Sunday magazine	1,217	3,682	-66.9
B2B magazine	4,036	4,974	-18.9
Local magazine	527	306	72.2
Spanish-language magazine	2,040	3,390	-39.8
Newspaper	1,274	613	107.8
National newspaper	2,021	1,749	15.6
Spanish-language newspaper	4	NA	NA
FSI	30,854	28,104	9.8
Network TV	213,917	203,365	5.2
Spot TV	17,340	16,432	5.5
Syndicated TV	72,131	56,757	27.1
Cable TV network	64,756	52,734	22.8
Spanish-language TV	24,055	19,788	21.6
Network radio	50	390	-87.2
National spot radio	372	125	197.6
Outdoor	2,017	1,112	81.4
Internet	3,252	2,436	33.5
Measured media	768,485	677,034	13.5
Unmeasured media	572,663	587,367	-2.5
Total	1,341,148	1,264,401	6.1
By brand	2004	2003	% chg
L'Oreal	307,092	293,646	4.6
Garnier	137,306	90,861	51.1
Maybelline	116,557	103,217	12.9
Lancome	34,971	39,663	-11.8
Matrix	21,870	26,662	-18.0
Redken	19,650	17,432	12.7
Ralph Lauren Frgrn. & Cosmetics	19,286	16,086	19.9
Attraction Fragrance Women	11,340	0	NA
Armani Fragrances	10,085	4,759	111.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$17,522	\$16,589	5.6
Earnings	2,065	1,890	9.3
North America	2004	2003	% chg
Sales	4,711	4,318	9.1
Division sales	2004	2003	% chg
Consumer Products	9,685	NA	NA
Luxury Products	4,396	NA	NA
Professional Products	2,496	NA	NA
Active Cosmetics	1,064	NA	NA

Headquarters

L'Oreal/41, rue Martre, Clichy, France 92117/Phone: 33-1-47-56-70-00.
L'Oreal/575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 818-1500.

Personnel, brands, agencies

Corporate: Laurent Attal, pres & CEO; Roger Dolden, exec VP & chief admin officer; Rebecca Caruso, exec VP-external affairs & corp comms.

Universal McCann Worldwide, New York. Scott Tegethoff, exec VP & global acct dir. — media svcs, L'Oreal Paris, L'Oreal USA, Consumer Products.

L'Oreal Luxury Products: 575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 818-1500. Edgar Huber, pres; Biotherm Division: Catherine Roggero, gm; Ralph Lauren Fragrances Worldwide: Signe Gammeltoft, pres; Armani Fragrances: Serge Juerdini, gm; European Designer Fragrances: Jack Wiswall, pres; Kiehl's Since 1851: Philip Clough, pres; Shu Uemura: Chris Salgado, gm; Lancome Division: Eric Lauzat, pres; Nina White, sr VP-mktg & deputy gm; Dalia Chammas, sr VP & gm; Active Cosmetics: Stephane Wilmet, gm.

Roberts & Tarlow, New York. Tanya English, dir-creative. — Ralph Lauren Fragrances, Polo Black, Polo Blue, Pure Turquoise, Romance, Glamorous, Ralph Lauren Style.

Publicis Worldwide, New York. Linda Joselow, exec VP-grp acct dir. — Biotherm, Lancome Paris.

Optimedia International, New York. Bonnie Barest, exec VP & mg dir-strategic comms. — media svcs, Biotherm, European Designers Fragrances, Lancome Paris.

L'Oreal Paris Division (div. of L'Oréal USA): 575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 818-1500. Carol J. Hamilton, pres; Robert E. Robillard, sr VP-mktg; Lisa J. Capparelli, VP-integrated mktg comms.

McCann Erickson Worldwide, New York. Martha Pease, exec VP & ww acct dir. — Color Cosmetics haircare, haircolor, skincare.

Universal McCann Worldwide, New York. Scott Tegethoff, exec VP & global acct dir. — media svcs.

La Micela New York, New York. Nick La Micela, CEO & chief creative officer; Brenda Chassey, exec VP-client svcs. — corp awareness adv, print & outdoor.

L'Oreal Professional Products: 575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 984-4000. David Craggs, pres; Paul Sharnsky, VP & gm; Pierre Lampert, VP-mktg & gm; Redken Worldwide: Stephan Bezy, gm; Redken US: Pat Parenty, VP & gm; L'Oreal Technique: Ray Mager, VP & gm; Matrix Worldwide: Ketan Patel, VP & gm; Matrix US: Francesca Raminella, VP & gm; Brooke Carlson, sr VP-mktg; Kerastase Paris: Frederique Besson, VP & gm; L'Oreal Professional: Pierre Lampert, VP & gm; Chris Tucker, assistant VP; Mizani: Taydra Mitchell-Jackson, VP-mktg.

Publicis Worldwide, New York. Linda Joselow, exec VP & grp acct dir. — L' Oreal Classic Salon Products, Matrix.

In-house. Stuart Sklar, VP-mktg; Deborah Marquardt, assoc VP-comms. — L'Oreal Professional, Kerastase.

No agency. — L'Oreal Technique, Mizani.

Gotham, New York. Sheri Baron, pres; Julie DeLoca, acct dir; Donna Cataldo, chief media officer; Kathi Darnulc, media dir. — media buying, Redken.

Burrell Communications Group, Chicago. Donna Beasley, acct dir. — African-American adv.

Maybelline Garnier: 575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 818-1500. Karen Fondu, pres-Maybelline New York-Garnier; Emma Walmsley, gm-Maybelline New York Worldwide.

Publicis Worldwide, New York. Linda Joselow, exec VP & grp acct dir. — Nutrisse, Fructis, 100% Color.

Gotham, New York. Sheri Baron, pres; Kathi Darnulc, grp media dir; Donna Cataldo, chief media officer. — media svcs, Maybelline.

ZenithOptimedia, New York. Bonnie Barest, exec VP & mg dir-strategic comms. — media svcs, Maybelline NY, Garnier.

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Soft Sheen-Carson Co.: 575 Fifth Ave., New York, N.Y. 10017/Phone: (212) 818-1500. Candace S. Matthews, pres & gm; Jonathan Matthews, VP-domestic mktg.

Publicis New York, New York. Linda Joselow, exec VP & grp acct dir. — Dark & Lovely, Hi-Rez, Optimum Care, Optimum Oil Therapy.

Carat ICG, Memphis, Tenn. Ken Washburn, VP & acct dir. — media svcs.

Noelle-Elaine Media, New York. Kristen Poe-Hill, acct dir. — event plng, prod launches, publicity.

66 Lowe's Cos.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$20,290	\$16,390	23.8
B2B magazine	173	197	-12.2
Spanish-language magazine	380	NA	NA
Newspaper	69,370	56,030	23.8
National newspaper	308	730	-57.8
Spanish-language newspaper	1,154	367	214.4
Network TV	105,028	97,147	8.1
Spot TV	50,732	49,460	2.6
Syndicated TV	843	2,224	-62.1
Cable TV network	48,097	57,925	-17.0
Spanish-language TV	12,840	NA	NA
National spot radio	19,000	18,827	0.9
Outdoor	728	1,310	-44.4
Internet	1,847	3,517	-47.5
Measured media	330,790	304,124	8.8
Unmeasured media	211,487	202,777	4.3
Total	542,277	506,901	7.0
By brand	2004	2003	% chg
Lowe's	330,788	304,124	8.8

Sales & earnings (\$ in millions)

Worldwide & U.S.	2004	2003	% chg
Sales	\$36,464	\$30,838	18.2
Earnings	2,176	1,844	18.0
Division sales	2004	2003	% chg
Lowe's stores	36,464	30,838	18.2

Headquarters

Lowe's Cos./1000 Lowe's Blvd., Mooresville, N.C. 28117/Phone: (704) 758-1000.

Personnel, brands, agencies

Corporate: Robert A. Niblock, pres, chmn & CEO.

McCann Erickson Worldwide, New York. Linda Luca, sr VP & grp acct dir. — Lowe's stores.

Universal McCann Worldwide, New York. Mike Neiss, sr VP & mg dir. — media svcs

Admerasia, New York. Melissa Garcia, sr acct super. — Asian-American adv.

Coyne Beahm Shouse, Greensboro, N.C. Chris Ng Cashin, VP & mgmt super. — direct mktg.

Cultura, Dallas. Melissa Garcia, sr acct super; Lori Reynolds, acct dir. — Hispanic adv.

Footsteps, New York. Melissa Garcia, sr acct super. — African-American adv.

R/GA, New York. Julia Rubinic, exec prod-interactive mktg.

50 Mars Inc.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$79,158	\$99,845	-20.7
Sunday magazine	356	1,946	-81.7
B2B magazine	1,387	1,596	-13.1
Newspaper	63	106	-40.6
National newspaper	1,026	1,011	1.5
Network TV	144,379	143,347	0.7
Spot TV	13,003	8,652	50.3
Syndicated TV	65,104	74,468	-12.6
Cable TV network	86,656	79,397	9.1
Spanish-language TV	5,520	10,142	-45.6
Network radio	2,569	4,584	-44.0
National spot radio	1,373	22	NA
Outdoor	1,289	3,518	-63.4
Internet	5,007	4,121	21.5
Measured media	406,890	432,755	-6.0
Unmeasured media	332,910	382,889	-13.1
Total	739,800	815,644	-9.3

By brand	2004	2003	% chg
Snickers	72,768	70,575	3.1
Pedigree Pet Food	67,358	56,199	19.9
M&Ms	52,684	73,574	-28.4
Uncle Bens	22,582	27,331	-17.4
Twix	22,032	22,013	0.1
Skittles	19,369	15,339	26.3
Whiskas	18,738	16,684	12.3
Starburst Candy	18,648	28,121	-33.7
Cesar Pet Food	18,578	16,525	12.4
Popables Candy	13,421	20,933	-35.9
3 Musketeers Candy Bar	13,036	16,590	-21.4
Aquadrops Candy	12,910	2,047	530.6
Cookies & Cookies	12,034	14,642	-17.8
Dove Candy & Ice Cream	10,874	7,880	38.0
Milky Way	10,770	14,151	-23.9
M-Azing Candy Bar	10,497	0	NA

Headquarters

Mars Inc./6885 Elm St., McLean, Va. 22101/Phone: (703) 821-4900.

Personnel, brands, agencies

Corporate: John Franklin Mars, pres, CEO & chmn; R.E. Barnes, VP & treasurer; Jaqueline Mars-Vogel, VP.

Masterfoods USA: 800 High St., Hackettstown, N.J. 07840/Phone: (908) 852-1000. Bob Gamgort, pres.

BBDO Worldwide, New York. Rob Rawley, exec VP & sr acct dir. — Kudos, M&M's, Snickers.

TBWA Worldwide, New York & Los Angeles. John McNeel, mg dir & acct exec(LA); Lisa Liebman, grp acct dir (N.Y.). — Combos, Haven, Lucas, Pedigree, Red Rocket, Seeds Of Change, Skittles, Uncle Ben's, Whiskas.

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Mediaedge:cia, New York. Rino Scanzoni, chief investment officer; George Janson, mg ptnr & dir-print. — media svcs.

MediaVest USA, New York & Los Angeles. Lisa Donahue, mg dir. — media svcs.

UniWorld Group, New York. Fiona Roache, dir-client svcs; Steve McKee, grp acct dir. — 3 Musketeers.

Zubi Advertising Services, Coral Gables, Fla. Paloma Vazquez, sr acct exec-Snickers, Twix, M&M's; Tatiana Blanco, acct exec-Snickers, Twix, M&M's; Anna Dirube, acct super-Starburst, Skittles; Frank Morales, asst acct exec-Starburst, Skittles. — Hispanic adv, Twix, M&M's, Snickers, Starburst, Skittles, Milky Way Popables, Cookies &.

Masterfoods USA Pet Care: P.O. Box 58853, Vernon, Calif. 90058/Phone: (323) 587-2727. John Curtiss, gm; Christopher Jones, mktg dir.

BBDO West, San Francisco. Tom Hollerbach, pres & CEO. — Cesar dog food, Sheba cat food.

TBWA Worldwide, Los Angeles. John McNeel, mg dir. — Pedigree pet food, Whiskas.

Mediaedge:cia, New York. Rino Scanzoni, chief investment officer; George Janson, mg ptnr & dir-print. — media svcs.

82 MasterCard International

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$51,859	\$53,590	-3.2
Sunday magazine	4,537	2,910	55.9
B2B magazine	2,984	4,047	-26.3
Local magazine	NA	7	NA
Spanish-language magazine	54	64	-15.6
Newspaper	1,813	5,478	-66.9
National newspaper	6,444	4,679	37.7
Spanish-language newspaper	12	7	71.4
Network TV	152,331	148,629	2.5
Spot TV	7,116	7,675	-7.3
Syndicated TV	26,328	23,452	12.3
Cable TV network	37,559	35,935	4.5
Spanish-language TV	13,822	11,405	21.2
Network radio	NA	1,599	NA
National spot radio	8,617	8,026	7.4
Outdoor	828	949	-12.8
Internet	14,612	13,719	6.5
Measured media	328,916	322,171	2.1
Unmeasured media	115,565	124,556	-7.2
Total	444,481	446,727	-0.5
By brand	2004	2003	% chg
MasterCard	328,916	322,169	2.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$2,593	\$2,231	16.2
Earnings	238	-386	NA
U.S.	2004	2003	% chg
Sales	1,504	1,406	7.0

Headquarters

MasterCard International/2000 Purchase St., Purchase, N.Y. 10577/Phone: (914) 249-2000.

Personnel, brands, agencies

Corporate: Robert W. Selander, pres & CEO; Larry Flanagan, chief mktg officer-global mktg; Ruth Ann Marshall, pres-N. Amer.; Debra Coughlin, sr VP-brand building; Elisa Romm, VP-brand building; Caryl Hahn, VP-global media; Cheryl Guerin, VP-relationship mktg.

McCann Erickson Worldwide, New York. Rich O'Leary, exec VP & ww acct dir. — MasterCard

GSD&M, Austin, Texas. Jill Otto, VP & grp media dir; Betty Pat McCoy, VP & natl bdcst dir. — media buying.

Integer Group, Dallas. Stacy Sarna, acct dir. — sls promo.

78 Mattel

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$28,324	\$25,661	10.4
Sunday magazine	55	166	-66.9
B2B magazine	535	585	-8.5
Spanish-language magazine	NA	326	NA
Newspaper	143	321	-55.5
National newspaper	NA	53	NA
Spanish-language newspaper	4	24	-83.3
FSI	10	68	-85.3
Network TV	60,648	64,424	-5.9
Spot TV	2,135	5,543	-61.5
Syndicated TV	4,612	5,435	-15.1
Cable TV network	91,376	87,029	5.0
Spanish-language TV	NA	729	NA
Network radio	591	66	795.5
National spot radio	474	2	NA
Outdoor	334	10	NA
Internet	3,463	2,289	51.3
Measured media	192,704	192,731	0.0
Unmeasured media	289,031	302,650	-4.5
Total	481,735	495,381	-2.8
By brand	2004	2003	% chg
Fisher-Price	71,888	75,653	-5.0
Mattel	42,673	51,659	-17.4
Barbie	34,628	27,775	24.7
Hot Wheels	12,721	13,551	-6.1
Mattel Electronic Games	12,317	5,166	138.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$5,103	\$4,960	2.9
Earnings	573	538	6.5
U.S.	2004	2003	% chg
Sales	3,210	3,204	0.2
segment income	577	631	-8.6
Division sales	2004	2003	% chg
Mattel Brands U.S.	1,512	1,594	-5.1
Fisher-Price Brands U.S.	1,319	1,265	4.3
American Girl Brands	379	345	9.9

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Headquarters

Mattel/333 Continental Blvd., El Segundo, Calif. 90245-5012/Phone: (310) 252-2000.

Personnel, brands, agencies

Corporate: Robert A. Eckert, chmn & CEO.

American Girl Brands: 8400 Fairway Place, Middleton, Wis. 53562-0998/Phone: 608-836-4848. Ellen L. Brothers, pres & exec VP.

Fisher-Price Brands U.S.: 636 E. Girard Ave., East Aurora, N.Y. 14052/Phone: (716) 687-3000. Neil Friedman, pres; Chuck Scothorn, sr VP-mktg.

Footo Cone & Belding Worldwide, New York. Jan Weinstein, sr VP & grp media dir; Kim Corrigan, exec VP & ww acct dir. — Disney, Nickelodeon, Sesame Workshop, Winnie the Pooh.

Gardner Geary Coll, San Francisco. Bari Jain, acct dir; Doug Powell, dir-media. — Fisher-Price, Power Wheels, Pixter, ESPNZone.

Mattel Brands, U.S.: 333 Continental Blvd., El Segundo, Calif. 90245-5012/Phone: (310) 252-2000. Matthew Bousquette, pres.

Davidandgoliath, Los Angeles. David Angelo, chmn — Hot Wheels.

Ogilvy & Mather Worldwide, Culver City, Calif. Rick Roth, pres; Ron Pattani, sr ptrn & ww client svcs dir. — Barbie, girls' activity toys, large dolls, plush, small dolls.

Y&R, Irvine, Calif. Susan Chittum, brand team leader. — Batman, electric racing, games & puzzles, Harry Potter, Hot Wheels, male action, Matchbox, Max Steel, My Scene, Pictionary, Scene-It?, Scrabble International, Superman, Tyco radio control, Uno, Yu-Gi-Oh.

Mediaedge:cia, New York. Rino Scanzoni, chief investment officer; Lee Doyle, mg ptrn & client svcs dir; Diane Metzler, mg ptrn & acct dir. — media buying, natl adult tv.

MediaVest, Los Angeles. Tom Szczepanski, mg dir- MediaVest Los Angeles. — media plng.

MindShare Worldwide. Jason Maltby, pres & co-exec dir-natl bdcst. — media buying, natl youth TV.

45 May Department Stores Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$38,857	\$33,569	15.8
Sunday magazine	137	463	-70.4
B2B magazine	9	13	-30.8
Local magazine	1,428	2,030	-29.7
Spanish-language magazine	23	15	53.3
Newspaper	417,759	469,480	-11.0
National newspaper	11,761	11,912	-1.3
Spanish-language newspaper	520	474	9.7
Network TV	5,611	4,684	19.8
Spot TV	96,821	53,552	80.8
Syndicated TV	10,823	12,075	-10.4
Cable TV network	2,189	2,281	-4.0

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
National spot radio	12,337	14,093	-12.5
Outdoor	588	3,489	-83.1
Internet	3,670	4,168	-11.9
Measured media	602,533	612,298	-1.6
Unmeasured media	190,273	95,903	98.4
Total	792,806	708,201	11.9
By brand	2004	2003	% chg
Robinsons-May	115,307	109,271	5.5
Foley's	105,369	104,183	1.1
Marshall Fields	60,444	57,672	4.8
Lord & Taylor	58,241	67,706	-14.0
Hechts	57,531	58,072	-0.9
Filenes	53,155	53,028	0.2
Dauids Bridal	40,223	40,136	0.2
Kaufmanns	39,472	52,584	-24.9
Strawbridges	21,949	21,870	0.4
Meier & Frank	17,000	11,811	43.9

Sales & earnings (\$ in millions)

Worldwide & U.S.	2004	2003	% chg
Sales	\$14,441	\$13,343	8.2
Earnings	524	434	20.7

Headquarters

May Department Stores Co./611 Olive St., St. Louis, Mo. 63101/Phone: (314) 342-6300.

Personnel, brands, agencies

Corporate: John Dunham, pres, chmn & CEO; Joe Civitillo, VP-bdcst adv.

Doner, Detroit. Vera Yardley, sr VP & acct dir. — bdcst creative & bdcst svcs.

David's Bridal/After Hours/Priscilla of Boston: 1001 Washington St., Conshohocken, Pa. 19428/Phone: (610) 943-5000. Lee Applebaum, sr VP-mktg; Gary Schwartz, VP-After Hours.

In-house.

Famous-Barr/L.S. Ayres/Jones Store: 601 Olive St., St. Louis, Mo. 63101/Phone: (314) 444-3111. Michael Albrecht, sr VP-sls promo.

In-house.

Filene's/Kaufmann's: 426 Washington St., Boston, Mass. 02108/Phone: (617) 357-2400. Jerry Eccher, sr VP-sls promo.

In-house.

Foley's: 1110 Main St., Houston, Texas 77002/Phone: (713) 405-7033. Jack Mullen, sr VP-sls promo, mktg & adv.

In-house.

Hecht's/Strawbridge's: 685 N. Glebe Rd., Arlington, Va. 22203-2199/Phone: (703) 558-1200. Laura Rutenis, sr VP-sls promo.

In-house.

Lord & Taylor: 424 Fifth Ave., New York, N.Y. 10018/Phone: (212) 391-3344. Howard Adler, sr VP-sls promo.

In-house.

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Marshall Field's: 700 on the Mall, Minneapolis, Minn. 55402/Phone: (612) 375-2200. Paul cavalli, sr VP-mktg.

In-house.

Haworth Marketing & Media, Minneapolis. Gary Tobey, CEO. — media svcs.

Robinsons-May/Meier & Frank: 6160 Laurel Canyon Blvd., North Hollywood, Calif. 91606-3247/Phone: (818) 508-5226. Mark Humphrey, sr VP-sls promo.

In-house.

85 Mazda Motor Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$85,734	\$48,261	77.6
B2B magazine	.79	217	-63.6
Spanish-language magazine	.274	1,206	-77.3
Newspaper	9,216	33,147	-72.2
National newspaper	NA	1,037	NA
Spanish-language newspaper	.3	2	50.0
Network TV	134,451	113,336	18.6
Spot TV	31,440	13,542	132.2
Syndicated TV	.16	NA	NA
Cable TV network	21,196	15,286	38.7
Spanish-language TV	.6	54	-88.9
Network radio	NA	601	NA
National spot radio	NA	18	NA
Outdoor	2,662	3,279	-18.8
Internet	8,118	2,727	197.7
Measured media	293,195	232,713	26.0
Unmeasured media	119,755	85,570	39.9
Total	412,950	318,283	29.7
By brand	2004	2003	% chg
Mazda	293,194	232,712	26.0

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$25,087	\$22,056	13.7
Earnings	.426	290	46.9

Headquarters

Mazda Motor Corp./3-1, Shinchu, Fuchu-cho, Aki-gun, Hiroshima, Japan 730-91/Phone: 81-82-282-1111.

Mazda North American Operations, 7755 Irvine Center Dr., Irvine, Calif. 92618-2992/Phone: (949) 727-1990.

Notes

Mazda Motor Corp. is 33% owned by Ford Motor Co.

Personnel, brands, agencies

Corporate: Kazuhide Watanabe, chmn; Hisakazu Imaki, pres & CEO.

Mazda North American Operations: 7755 Irvine Center Dr., Irvine, Calif. 92618-2922/Phone: (949) 727-1990. James O'Sullivan, pres & CEO; Robert Davis, sr VP-prod devel & quality; Brian Colianni, sr VP-sls & mktg.

Doner, Detroit & Newport Beach, Calif. Tim Blett, pres-Doner Newport Beach. — Mazda vehicles.

Bravo Group, New York. Linda De Jesus-Cutler, pres. — Hispanic adv.

UniWorld Group, Irvine, Calif. Chuck Morrison, exec VP & gm; Steve Goodman, dir-media svcs. — African-American media buying.

Wimbley Group, Itasca, Ill. Charles L. Wimbley Jr., VP & acct dir. — African-American adv.

18 McDonald's Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$49,934	\$20,224	146.9
Sunday magazine	.68	1,423	-95.2
B2B magazine	.363	119	205.0
Local magazine	.10	7	42.9
Spanish-language magazine	.462	387	19.4
Newspaper	3,004	2,113	42.2
National newspaper	1,285	720	78.5
Spanish-language newspaper	.199	123	61.8
FSI	.348	646	-46.1
Network TV	203,709	256,094	-20.5
Spot TV	154,392	139,128	11.0
Syndicated TV	33,885	42,289	-19.9
Cable TV network	85,758	71,336	20.2
Spanish-language TV	51,576	54,032	-4.5
Network radio	6,034	3,472	73.8
National spot radio	4,482	5,014	-10.6
Outdoor	38,444	41,595	-7.6
Internet	5,273	1,035	409.5
Measured media	639,226	639,757	-0.1
Unmeasured media	749,636	730,174	2.7
Total	1,388,862	1,369,931	1.4
By brand	2004	2003	% chg
McDonald's	614,002	620,208	-1.0
Boston Market	23,377	17,567	33.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$19,065	\$17,140	11.2
Earnings	2,279	1,471	54.9
U.S.	2004	2003	% chg
Sales	6,525	6,039	8.0
Operating income	2,182	1,982	10.1
Division sales	2004	2003	% chg
WW Company-operated units	14,224	12,795	11.2
WW Franchise, affiliated units	4,841	4,345	11.4

Headquarters

McDonald's Corp./2111 McDonald's Dr., Oak Brook, Ill. 60523/Phone: (630) 623-3000.

Notes

Jim Skinner became the new CEO of McDonald's Corp. earlier this year, replacing Charlie Bell who stepped down from the position in November 2004 and died in mid-January 2005 at the age

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of 44. Mr. Bell had become CEO in the spring of 2004 following the sudden death of chairman & CEO Jim Cantalupo. A little more than a week after becoming the new CEO, Mr. Bell underwent colorectal cancer surgery. He left the company to fight that disease.

Personnel, brands, agencies

Corporate: Andrew McKenna, chmn; Jim Skinner, CEO; Larry Light, exec VP & global chief mktg officer; Dean Barrett, sr VP-global mktg; Bill Lamar, chief mktg officer-U.S.; Marlana Peleo-Lazar, VP & chief creative officer-U.S.; Peter Sterling, VP-mktg, U.S.; Neil Golden, VP-mktg & rsch, U.S.; Dan Ryan, VP-mktg, U.S.; Wendy Cook, VP-menu & mktg innovation, U.S..

DDB Worldwide, Chicago. Dick Rogers, pres-DDB N. Amer.; Don Hoffman, exec VP & acct dir. — McDonald's.

OMD Worldwide, New York. Paul Davey, acct dir-global; Ed Hughes, acct dir-Chicago; Kristina Macharg, acct dir-New York. — media svcs.

Leo Burnett Worldwide, Chicago. Bob Raidt, exec VP & ww dir. — youth marketing.

Burrell Communications Group, Chicago. Fay Ferguson, co-CEO; Vicki Bolton, VP & acct dir. — African-American adv.

Creata Promotions, Oak Brook, Ill. Sandy Silver, pres; Russell Vine, VP. — sls promo.

Del Rivero Messianu DDB, Coral Gables, Fla. Marielle Lorenz, acct exec. — Hispanic adv.

Frankel (an Arc Worldwide co.), Chicago. Jenny Cacioppo, exec VP & client solutions ptrn. — promo/shopper mktg, in-store adv & interactive mktg.

IW Group. Irene Chung, acct svcs. — Asian-American adv.

Marketing Store, Lombard, Ill. Dean Govostis, exec VP. — sls promo.

Tribal DDB, New York. Paul Gunning, acct dir. — interactive mktg.

Boston Market: 14103 Denver West Pkwy., Golden, Colo. 80401-4086/Phone: (303) 278-9500. Michael D. Andres, pres & CEO.

Arnold Worldwide, Boston. Jerrie Van Gelder, exec VP & grp acct dir; Tom Lawson, mg ptrn. — Boston Market.

Chipotle Mexican Grill: 1543 Wazee St., Denver, Colo. 80202/Phone: (303) 595-4000. Steve Ells, founder & CEO; Jim Adams, dir-mktg; Dan Fogarty, brand dir.

TDA, Denver. Thomas Dooley, pres. — Chipotle Mexican Grill.

Results Media Group, Phoenix. Mike Horne, pres.

24 Merck & Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$114,719	\$135,310	-15.2
Sunday magazine	3,944	16,114	-75.5
B2B magazine	319	578	-44.8
Local magazine	8	NA	NA
Spanish-language magazine	384	NA	NA
Newspaper	11,345	15,297	-25.8
National newspaper	5,909	1,525	287.5
Spanish-language newspaper	118	10	NA
FSI	410	252	62.7

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Network TV	134,661	140,116	-3.9
Spot TV	4,554	6,212	-26.7
Syndicated TV	27,922	20,270	37.8
Cable TV network	32,328	20,715	56.1
Spanish-language TV	5,538	NA	NA
Network radio	NA	460	NA
National spot radio	34	NA	NA
Outdoor	12	25	-52.0
Internet	8,283	3,071	169.7
Measured media	350,488	359,955	-2.6
Unmeasured media	899,788	764,114	17.8
Total	1,250,276	1,124,069	11.2
By brand	2004	2003	% chg
Singular	112,479	115,624	-2.7
Zocor Cholesterol Rx	90,980	83,284	9.2
Vioxx Osteoarthritis Rx	81,293	79,119	2.7
Fosamax Osteoporosis Rx	28,819	54,269	-46.9
Merck	18,819	25,517	-26.3

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$22,939	\$22,486	2.0
Earnings	5,813	6,831	-14.9
U.S.	2004	2003	% chg
Sales	13,472	13,321	1.1
Division sales	2004	2003	% chg
Pharmaceutical	21,494	21,038	2.2
All other	1,221	1,219	0.2

Headquarters

Merck & Co./1 Merck Dr., P.O. Box 100, Whitehouse Station, N.J. 08889-0100/Phone: (908) 423-1000.

Notes

Richard T. Clark replaced Raymond V. Gilmartin, who had planned to retire a year later, as chairman and CEO of Merck in early May 2005 following Mr. Gilmartin's resignation. Mr. Clark was Merck's head of manufacturing. Merck faces thousands of lawsuits over painkiller Vioxx, forced off the market in late 2004.

Personnel, brands, agencies

Corporate: Rickard T. Clark, chmn, pres & CEO.

Initiative Media Worldwide, New York. Larry Orell, exec VP. — media buying & research.

U.S. Human Health: P.O. Box 4, West Point, Pa. 19486/Phone: (215) 652-5000. David W. Anstice, pres-Human Health; Bradley T. Sheares, pres-U.S. Human Health; Margaret G. McGlynn, pres-U.S. Human Health.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; Davis Chapman, pres-Ferguson. — Oncology franchise.

DDB Worldwide Communications, New York. Ellen Fields, grp acct dir. — Arcoxia (DTC), Singular (DTC), Vioxx (DTC).

FCB HealthCare, New York. Tom Domanico, chmn, CEP & ww creative dir; Dana Maiman, pres & CEO. — Cozaar (health-care professional), Hyzaar, Zocor (healthcare professional), Fosamaz, Media AOR, Propecia.

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Foote Cone & Belding Worldwide, New York. Rob Peterson, exec VP & dir-cons healthcare; Margie Wainfain, sr VP & grp mg dir. — Fosamax (DTC & healthcare professional), all Merck brands.

Hal Lewis Group, Philadelphia. David Winograd, pres; James Boland, chief ops officer. — Cosopt, Ophthalmics, Trusopt.

Initiative Media North America, New York. Larry Orell, exec VP & gm. — media buying & rsch.

KPR, New York. Miriam Slome, sr VP & dir-client svcs; Jack Dorsey, sr VP & mgmt super. — Crixivan, Proscar, Invanz, Primaxin.

Ogilvy & Mather Worldwide, New York. Mike Guarini, exec grp dir. — Zocor (DTC & direct mktg).

Prime Access, New York. Howard Buford, pres & CEO; Mark Wilson, VP-grp acct dir; Lorraine McNeill-Popper, exec creative dir; Sharman Davis, media dir. — Maxalt, Vytarin, Merck e-business, Zocor (African-American adv); AORethnic, gay & lesbian media buying (DTC).

Regan Campbell Ward, New York. Maureen Regan, mg ptrn. — Cancidas.

R/GA, New York. John Antinori, exec producer. — interactive mktg, special projects.

Vaccine Division: 770 Sunnyside Pike, West Point, Pa. 19486 /Phone: (215) 652-5000. Adel A.F. Mahmoud, M.D., PhD, pres-Merck Vaccine.

CommonHealth, Wayne, N.J. Matt Giegerich, pres & CEO-CommonHealth; Nanske Wood, pres-Carbon. — ProQuad, Hexavac, Varivax.

Prime Access, New York. Howard Buford, pres & CEO; Mark Wilson, VP & grp acct dir; Lorraine McNeill-Popper, exec creative dir. — new assignments ethnic.

33 Microsoft Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$82,092	\$145,306	-43.5
Sunday magazine	2,831	4,671	-39.4
B2B magazine	79,027	67,024	17.9
Local magazine	.9	NA	NA
Spanish-language magazine	.272	84	223.8
Newspaper	6,595	12,058	-45.3
National newspaper	5,201	30,004	-82.7
Spanish-language newspaper	.2	NA	NA
FSI	NA	76	NA
Network TV	78,035	136,653	-42.9
Spot TV	9,118	29,250	-68.8
Syndicated TV	1,962	2,136	-8.1
Cable TV network	58,102	93,385	-37.8
Spanish-language TV	1,101	NA	NA
Network radio	.53	NA	NA
National spot radio	2,375	2,543	-6.6
Outdoor	3,004	385	680.3
Internet	153,674	62,977	144.0
Measured media	483,453	586,552	-17.6
Unmeasured media	503,186	593,961	-15.3
Total	986,639	1,180,513	-16.4

By brand	2004	2003	% chg
Microsoft	308,572	452,820	-31.9
MSN	140,873	96,665	45.7
Xbox Electronic Games	25,302	17,328	46.0

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$36,835	\$32,187	14.4
Earnings	8,168	7,531	8.5
U.S.	2004	2003	% chg
Sales	25,046	22,077	13.4
Income bef. income taxes	12,196	11,054	10.3
Division sales	2004	2003	% chg
Client	11,546	10,394	11.1
Information Worker	10,800	9,229	17.0
Server and Tools	8,483	7,140	18.8
Home and Entertainment	2,876	2,748	4.7
MSN	2,216	1,953	13.5
Microsoft Business Solutions	.667	567	17.6
Mobile and Embedded Devices	.247	156	58.3

Headquarters

Microsoft Corp./1 Microsoft Way, Redmond, Wash. 98052-6399/Phone: (425) 882-8080.

Notes

Microsoft in January 2005 formed a central marketing group, a move that streamlines its marketing and advertising. The group is headed by Mike Delman, general manager.

Personnel, brands, agencies

Corporate: Bill Gates, chmn & chief software architect; Steve Ballmer, CEO; Mich Matthews, sr VP, corp mktg grp; Michael Delman, corp VP-global mktg comms grp; Orlando Ayala, sr VP-small & midmarket solutions & ptrn grp.

McCann Erickson Worldwide, San Francisco. Courtney Buechert, exec VP; Matt Ross, global chief exec-Microsoft brands. — Microsoft Software, MSN Internet Services, Xbox.

Y&R, New York. Jan Valentic, global client leader; Stewart Pearson, global client leader. — mobility & embedded devices, MSN, server & tools, Xbox.

Universal McCann Worldwide, New York & San Francisco. Karen Polsky, sr VP & mg dir. — media svcs.

VML, Kansas City, Mo. Jon Cook, chief client officer. — interactive mktg.

92 Mitsubishi Motors Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$36,225	\$16,546	118.9
B2B magazine	104	NA	NA
Spanish-language magazine	363	357	1.7
Newspaper	11,028	34,029	-67.6
National newspaper	1,113	231	381.8
Spanish-language newspaper	.24	1	NA
Network TV	103,864	160,089	-35.1
Spot TV	58,001	27,458	111.2

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Syndicated TV	4,869	10,906	-55.4
Cable TV network	42,559	22,619	88.2
Spanish-language TV	20	NA	NA
Network radio	135	9	NA
Outdoor	1,496	877	70.6
Internet	1,994	843	136.5
Measured media	261,795	273,965	-4.4
Unmeasured media	112,198	103,861	8.0
Total	373,993	377,826	-1.0
By brand	2004	2003	% chg
Mitsubishi	261,794	273,964	-4.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$19,754	\$21,582	-8.5
Earnings	-4,419	-1,845	NA
North America	2004	2003	% chg
Sales	3,930	5,077	-22.6
Division sales	2004	2003	% chg
Automotive	19,422	20,970	-7.4
Financial svcs	332	613	-45.8

Headquarters

Mitsubishi Motors Corp./5-33-8 Shiba, Minato-ku, Tokyo, Japan
108-8410/Phone: 81-3-3456-1111.

Mitsubishi Motors North America, 6400 Katella Ave., Cypress, Calif. 90630/Phone: (714) 372-6000.

Notes

Mitsubishi has experienced a number of resignations in the past year, the latest occurring in late March 2005 when Robert Martin resigned as director of brand marketing, Mitsubishi Motors North America, after being at the company only since November. He had followed Finbarr O'Neill from Hyundai when he became co-chair and CEO at Mitsubishi in September 2003. Mr. O'Neill resigned unexpectedly in January 2005. Mitsubishi has initiated a revitalization program to bring it to profitability. DaimlerChrysler has whittled its investment in Mitsubishi from 37% in 2004 to less than 20%.

Personnel, brands, agencies

Corporate: Takashi Nishioka, chmn & CEO; Osamu Masuko, pres & chief operating officer.

Mitsubishi Motors North America: 6400 Katella Ave., Cypress, Calif. 90630/Phone: (714) 372-6000. Hideyasu Tagaya, chmn; Richard Gilligan, pres & CEO; Hiroshi Taguchi, sr VP-corp strategy; David Schembri, exec VP-sls & mktg; Dan Irvin, dir-corp comms & PR.

BBDO Worldwide, New York. Mark Goldstein, exec VP & mg dir-N. Amer.. — Mitsubishi vehicles.

PHD, New York. Steve Grubbs, pres & CEO-N. Amer.. — media svcs.

Davinci Selectwork, Venice, Calif. Alex Crowther, CEO-Americas; Gwen Conley, mg ptnr. — media optimization.

100 Molson Coors Brewing Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$8,247	\$4,182	97.2
Sunday magazine	NA	104	NA
B2B magazine	163	244	-33.2
Local magazine	16	16	0.0
Spanish-language magazine	100	110	-9.1
Newspaper	2,407	1,161	107.3
National newspaper	1,278	1,060	20.6
Spanish-language newspaper	151	58	160.3
FSI	NA	30	NA
Network TV	77,704	92,795	-16.3
Spot TV	23,296	34,630	-32.7
Syndicated TV	14	9	55.6
Cable TV network	28,598	25,186	13.5
Spanish-language TV	3,821	18	NA
Network radio	NA	139	NA
National spot radio	3,483	3,170	9.9
Outdoor	15,741	9,715	62.0
Internet	3,704	922	301.7
Measured media	168,723	173,549	-2.8
Unmeasured media	162,106	174,966	-7.3
Total	330,829	348,515	-5.1
By brand	2004	2003	% chg
Coors	164,153	151,802	8.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$4,306	\$4,000	7.7
Earnings	197	175	12.6
Americas	2004	2003	% chg
Sales	2,153	2,326	-7.4
Income before taxes	261	221	18.1

Headquarters

Molson Coors Brewing Co./1555 Notre Dame St. East, Montreal, Quebec, Canada H2L 2R5.

Molson Coors Brewing Co./311 Tenth St., Golden, Colo. 80401/Phone: (303) 279-6565.

Notes

Coors shareholders in early February 2005 approved its \$3.4 billion merger with Molson of Canada a week after Molson shareholders had done the same. The brewery unit is called Molson Coors Brewing Co. and is headquartered in both Montreal and Denver.

Personnel, brands, agencies

Corporate: Eric H. Molson, chmn; W. Leo Kiely III, pres & CEO.

Coors Brewing Co.: 311 Tenth St., Golden, Colo. 80401/Phone: (303) 279-6565. Fritz van Paasschen, pres & CEO-Coors Brewing Co.; Lee Buxton, chief mktg officer.

Foot Cone & Belding Worldwide, Chicago. Marty Stock, sr VP & mg dir. — Coors Original, Coors Light, Coors Edge, Keystone, Killians.

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BrainStorm Group, Toronto. Cora Brady, acct dir. — Molson Canadian, Molson Export, Molson Dry, Molson Ultra.

Deutsch, Los Angeles. Mike Sheldon, mg ptrn & gm. — Aspen Edge.

Initiative Media North America, New York. Tim Spengler, exec VP-dir natl bdcst. — natl tv media buying.

Bromley Communications, San Antonio. Sue de Lopez, grp acct dir. — Hispanic adv.

Carol H. Williams Advertising, Oakland, Calif. Stacey Manley, acct exec. — African-American adv.

31 Nestle

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$110,840	\$117,921	-6.0
Sunday magazine	4,107	2,124	93.4
B2B magazine	2,287	2,293	-0.3
Local magazine	16	228	-93.0
Spanish-language magazine	200	390	-48.7
Newspaper	1,649	1,437	14.8
National newspaper	878	1,294	-32.1
Spanish-language newspaper	8	10	-20.0
FSI	24,960	26,681	-6.5
Network TV	154,569	186,608	-17.2
Spot TV	31,927	28,790	10.9
Syndicated TV	42,712	44,873	-4.8
Cable TV network	79,057	82,789	-4.5
Spanish-language TV	3,533	3,962	-10.8
Network radio	4,168	3,106	34.2
National spot radio	14,631	3,078	375.3
Outdoor	4,435	800	454.4
Internet	17,998	16,373	9.9
Measured media	497,975	522,757	-4.7
Unmeasured media	530,316	431,236	23.0
Total	1,028,291	953,993	7.8

By brand	2004	2003	% chg
Nestle	93,497	79,247	18.0
Purina	80,971	90,291	-10.3
Lean Cuisine	29,920	33,472	-10.6
Edys	27,183	98	27779.5
Friskies	24,525	23,948	2.4
Coffee-Mate	20,151	16,505	22.1
Hot Pockets	17,398	16,508	5.4
Stouffers	15,286	46,175	-66.9
Tidy Cat	14,494	20,141	-28.0
Patanol Allergy Rx	12,792	18,044	-29.1
Juicy Juice	12,383	8,360	48.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$70,114	\$65,301	7.4
Earnings	5,428	4,612	17.7
Americas	2004	2003	% chg
Sales	22,444	20,527	9.3
EBITA	3,355	3,080	8.9

Division sales	2004	2003	% chg
Milk prods, nutrition & ice cream	19,056	17,282	10.3
Beverages	17,610	17,458	0.9
Prepared dishes & cooking aids	12,830	11,926	7.6
Chocolate, confectn. & biscuits	8,289	7,601	9.1
Petcare	8,027	7,286	10.2
Pharmaceutical products	4,302	3,750	14.7

Headquarters

Nestle/Ave. Nestle 55, Vevey, Switzerland CH-1800/Phone: 41-21-924-2111.

Nestle U.S.A./800 N. Brand Blvd., Glendale, Calif. 91203/Phone: (818) 549-6000.

Personnel, brands, agencies

Corporate: Peter Brabeck-Letmathe, vice chmn & CEO; Nestle USA: Joe M. Weller, chmn & CEO; Al Steffl, sr VP-comms; Karen Crawford, dir-media adv & relationship mktg; Jackie Lilley, VP-promos & event mktg; Laurie MacDonald, VP-corp & brand affairs; Mary Beth Rymers, dir-market intelligence; Beth Thomas-Kim, dir-cons svcs.

ZenithOptimedia, New York, Los Angeles, Dallas. Susan Eberhardt, exec VP-comms plng. — media svcs.

Alcon Laboratories: 6201 South Fwy., Fort Worth, Texas 76134/Phone: (817) 293-0450. Cary Rayment, pres & CEO; Glenn Moro, dir-global mktg-lens care; Robert Warner, dir-global pharmaceutical mktg; Stuart Raetzman, VP-sls & mktg, surgical cataract; Ashish Pal, dir-global mktg, retina pharmaceutical; Laurent Attias, dir-global refractive sls & mktg; Mike Southard, VP-global cataract mktg; Pierre Morival, dir-global mktg-glaucoma/retina; Rick McLaughlin, dir-global mktg-anti-allergy; Kim Fisher, sr prod mgr-Dry Eye; John Meyer, sr prod mgr-vitamins; Brian O'Neal, U.S. prod mgr-anti-allergy & anti-allergy OTC & irrigating solutions; Seph Jensen, U.S. prod mgr-Glaucoma; Alex Long, dir global mktg-anti-infectives, anti-inflammatories, combination prods; David Nutchey, U.S. sr prod mgr-Otic; Heather Drennan, U.S. prod mgr-Otic; Seba Leoni, U.S. sr prod mgr-anti-infectives, combination & anti-inflammatories; Jay Stark, U.S. prod mgr-anti-allergy, anti-allergy OTC, irrigating solutions; Jon Sison, global mktg dir-IOLs & disposables; Mark Forchette, VP-sls & mktg, surgical vitreoretinal.

Corbett Accel Healthcare Group, Chicago. Robert DeBartolo, exec VP-dir client svcs. — Opti-Free.

Foot Cone & Belding Worldwide, New York. Jessica Brenner, mgmt dir. — cons mktg, Patanol, Patanese, Retaane.

TBWA Worldwide, New York. Victor Imbimbo, exec grp dir; Nicole Minore, grp acct dir.

Dreyer's Grand Ice Cream Holdings: 5929 College Ave., Oakland, Calif. 94618/Phone: (800) 888-3442. T. Gary Rogers, chmn & CEO; Tyler Johnson, exec VP-mktg.

Goodby, Silverstein & Partners, San Francisco. Robert Riccardi, ptrn & dir- acct mgmt; Kate Jenkins, acct mgr. — Dreyer's Grand Ice Cream, Edy's Grand Ice Cream, Haagen-Dazs.

JWT, Chicago. Scott Remy, dir-acct mgmt. — Dreyer's ice cream novelties brands, Drumstick, Push Up, Skinny Cow.

ZenithOptimedia, New York, Los Angeles, Dallas. Susan Eberhardt, exec VP-comms plng. — media svcs.

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Galderma: L.P. 14501, Fort Worth, Texas 76177/Phone: (817) 961-5000. Anne Egger, VP-mktg.

Nelson Communications Worldwide, New York. Jennifer Cohen, acct dir. — Metro, Triluma.

Sudler & Hennessey, New York. Cathy Midura, acct exec. — Cetaphil.

Sudler & Hennessey, New York. John Marchese, acct exec. — Clobex. — Clobex.

Nelson Communications Worldwide, New York. Andrea Conigliaro, acct super. — Differin.

Publicis Healthcare Communication Group, New York. Marjorie Nelson-Perry, VP & grp acct dir. — Differin, MetroBrands, Triluma.

Nestle Brands Co.: 800 N. Brand Blvd., Glendale, Calif. 91203/Phone: (818) 549-6000. Brad Alford, pres & CEO; Rob Case, pres-Beverage; Tim Connor, pres-Food Services N. Amer.; Dave Hubinger, pres-Confections & Snacks; Mike Mitchell, pres-sls.

Dailey & Associates, Los Angeles. Tom Lehr, exec VP & mg dir. — Baby Ruth, Nestle Crunch products, Willy Wonka products.

JWT, Chicago. Scott Remy, dir-acct mgmt. — Butterfinger, Butterfinger Crisp, Carnation Condensed & Evaporated Milks, Libby's Pumpkin, Toll House Candy Bars, Toll House Morsels, Treasures, Turtles.

McCann Erickson Worldwide, Los Angeles. Lisa Epstein, sr VP & grp mg dir. — Carnation Coffee-mate, Carnation Instant Breakfast, Good Start formulas, Nescafe, Nescafe Frothe, Nesquik, Taster's Choice.

Publicis Worldwide, Dallas. Mike Knowles, VP & mgmt super. — Nestle Juicy Juice, PowerBar.

Universal McCann Worldwide, New York. George Hayes, exec VP-client svcs dir. — media buying.

Bromley Communications, Glendale, Calif. Amy Niederhauser, grp acct dir. — Hispanic adv, Abuelita, Clasico, Coffee-mate, La Lechera, Libby's, Maggi, Milo, NAN Infant Formula, Nesquik, Nestlé Crunch, Wonka.

Burrell Communications Group, Chicago. Aaron Payne, super. — African-American adv, Coffeemate.

Casanova Pendrill, Irvine, Calif. Guillermo Cenicerros, acct dir. — Hispanic media buying-bdcast, Nesquik.

Publicis Dialog Southern California, Irvine, Calif. Mary Puls, mg dir. — cons promo, Buitoni, Coffeemate, Juicy Juice, Maggi, Multibrand events, Nesquik, Nestle European Style Mousse, Wonka Confections.

Nestle Prepared Foods: 30003 Bainbridge Rd., Solon, Ohio 44139/Phone: (440) 349-5757. Stephen Cunliffe, pres & CEO.

Euro RSCG, New York. David Bartlem, sr VP & grp mg dir. — Stouffer's, Lean Cuisine.

JWT, Chicago. Howard Cortemanche, U.S. acct dir. — Stouffer's Red Box single-serve & multi-serve.

Publicis Worldwide, Dallas. David Hayes, VP & mgmt super. — Buitoni, Croissant Pockets, Hot Pockets, Lean Pockets.

ZenithOptimedia, New York, Los Angeles, Dallas. Susan Eberhardt, exec VP-comms plng. — media svcs.

Bromley Communications, Glendale, Calif. Veronica Jimenez, sr acct exec. — Hispanic adv.

Nestle Purina PetCare: Checkboard Square, St. Louis, Mo. 63164/Phone: (314) 982-1000. W.P. McGinnis, CEO & pres; T.E. Block, pres-pet foods, N. Amer; S.L. Crimmins, VP-dog food & new prods; J.C. Vella, VP-cat food mktg; J.T. Quinn, VP-strategic plng, influential & treats; M.L. Crawford, VP-cons comms & insights; R. Watt, pres-golden prods & litter.

Avrett Free Ginsberg, New York. F. Ginsberg, chmn, CEO & creative dir. — Cat Chow, Chef's Blend, Friskies, Kitten Chow.

Berlin Cameron/Red Cell, New York. Andy Berlin, chmn. — Tidy Cats.

CheckMark Communications (In-house) J.K. Lucas, VP & gm. — Alpo dog food, Mighty Dog.

Colle & McVoy, Minneapolis. John Jarvis, CEO & chief creative officer. — Purina Veterinary Diets, Breeder.

Fallon Worldwide, Minneapolis. Patrick R. Fallon, chmn. — Beneful, Dog Chow, ONE Dog, ONE Cat, Pro Plan, Puppy Chow.

McCann Erickson Worldwide, Los Angeles. Ian McGregor, gm & exec VP. — Fancy Feast.

ZenithOptimedia, New York, Los Angeles, Dallas. Susan Eberhardt, exec VP-comms plng. — media svcs.

Arc Worldwide, Chicago. Pat Isom, VP & acct dir. — interactive mktg.

R/GA, New York. Gabe Weiss, acct dir. — cons awareness adv, interactive mktg, multichannel mktg, special projects.

Nestle Waters North America: 777 W. Putnam Ave., Greenwich, Conn. 06830/Phone: (203) 531-4100. Kim Jeffery, pres & CEO; Robert Davino, VP-mktg.

McCann Erickson Worldwide, New York. Gregg Fujimoto, sr VP & grp mg dir. — Arrowhead, Deer Park, Ozarka, Poland Spring, Zephyrhills.

Ogilvy & Mather Worldwide, New York. Janet Berg, sr ptnr & mgmt super. — Ice Mountain, Perrier, San Pellegrino.

ZenithOptimedia, New York, Los Angeles, Dallas. Susan Eberhardt, exec VP-comms plng. — media svcs.

Media Horizons, Norwalk, Conn. Alan Kraft, pres & CEO; James Kabakow, sr VP. — direct response media.

Bromley Communications, New York. Jane Finney, acct dir. — Hispanic adv, Arrowhead, Ozarka, Poland Springs, Zephyr Hills.

38 News Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$57,593	\$56,885	1.2
Sunday magazine	3,038	1,865	62.9
B2B magazine	13,022	11,280	15.4
Local magazine	39	103	-62.1
Spanish-language magazine	103	453	-77.3
Newspaper	118,176	115,346	2.5
National newspaper	33,170	30,604	8.4
Spanish-language newspaper	716	655	9.3
FSI	4,369	399	995.0
Network TV	176,354	164,202	7.4
Spot TV	49,345	35,115	40.5
Syndicated TV	14,989	8,806	70.2
Cable TV network	93,722	64,898	44.4

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Spanish-language TV	4,845	12,487	-61.2
Network radio	5,439	4,445	22.4
National spot radio	50,552	53,729	-5.9
Outdoor	20,329	12,588	61.5
Internet	35,337	26,399	33.9
Measured media	681,138	600,259	13.5
Unmeasured media	209,347	194,257	7.8
Total	890,485	794,516	12.1
By brand	2004	2003	% chg
20th Century Fox	305,270	306,552	-0.4
Fox Searchlight movies	110,646	62,829	76.1
News Corp. videos	105,730	69,155	52.9
Fox	89,618	101,141	-11.4
Promotionals	19,007	19,699	-3.5
20th Century Fox	10,660	10,544	1.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$21,761	\$19,250	13.0
Earnings	1,710	1,164	46.9
U.S.	2004	2003	% chg
Sales	14,976	14,601	2.6
Other revenues bef. income tax	.893	332	169.0
Division sales	2004	2003	% chg
Filmed Entertainment	5,187	4,486	15.6
Television	5,027	4,763	5.5
Newspapers	3,425	2,718	26.0
Cable network programming	2,538	2,270	11.8
Direct Bdcast Cable Television	1,665	220	656.8
Book publishing	1,276	1,162	9.8
Magazines & inserts	979	923	6.1
Other	862	932	-7.5

Headquarters

News Corp./1211 Ave. of the Americas, 8th Fl., New York, N.Y. 10036/Phone: (212) 852-7000.

Personnel, brands, agencies

Corporate: K. Rupert Murdoch, chmn & chief exec; Peter Chernin, pres & chief operating officer; Lachlan Murdoch, deputy chief operating officer.

DirecTV Group: 2230 E. Imperial Hwy., El Segundo, Calif. 90245/Phone: (310) 964-0700. David Hill, chief operating officer; Stephanie Campbell, sr VP-prog; Bob Marsocci, VP-comms.

BBDO Worldwide, New York. Peter Sherman, sr VP & acct dir. — DirecTV

Fox Broadcasting Co.: 10201 W. Pico Blvd., Los Angeles, Calif. 90035/Phone: (310) 277-2211. Tony Vinciguerra, pres & CEO-Fox Network Grp.; Gail Berman, pres-Entertainment & Fox Broadcasting Co; Ed Wilson, pres-Fox Television Network; John Nesvig, pres-adv sls & exec VP, Fox Television; Roberta Mell, exec VP-mktg; Kaye Bentley, sr VP-natl media-affiliate & natl promo.

No agency. — Fox Broadcasting Co., Fox television stations, Fox television studios, 20th Century Television.

Fox Cable Networks Group: 10000 Santa Monica Blvd., Los Angeles, Calif. 90067/Phone: (310) 286-3800. Anthony J. Vinciguerra, pres & CEO, Fox Networks Group; Lou LaTorre, pres, adv & sls; Lindsay Gardner, exec VP-affiliate sls & mktg; Todd Schoen, sr VP-affiliate mktg; Bruce Lefkowitz, exec VP-adv sls, Fox Cable Entertainment; Guy Sousa, exec VP-adv sls, Cable Fox Sports; John Landgraf, pres & gm-FX; Stephanie Gibbons, sr VP-mktg & promo; Chuck Saffler, sr VP-programming; Eric Shiu, VP-mktg & adv; Kaye Bentley, sr VP- natl media; Fox Sports Net: David Hill, chmn & CEO, Fox Sports Television Grp; Bob Thompson, pres-Fox Sports Net, Fox Sports Networks, Fox Sports Intl & Fox College Sports; Randy Freer, chief operating officer; Erik Markgraf, exec VP-mktg; Fox Soccer Channel: David Sternberg, exec VP & gm; Dermot McQuarrie, asst gm & sr VP-prog & prod; Raul de Quesada, sr VP-mktg & comms; Fuel TV: David Sternberg, exec VP & gm; CJ Olivares, asst gm & sr VP-prog & mktg; Jake Munsey, creative dir; Ted Chi, dir-mktg; Steven Schiffman, EVP-mktg & new media; National Geographic Channel: Laureen Ong, pres; Kiera Hynninen, sr VP-mktg; Rich Goldfarb, sr VP-media sls; Brad Dancer, VP-rsch; Speed Channel: Hunter Nickell, exec VP-gm; Bill Osborn, sr VP-mktg; Nancy MacDonald, mktg mgr-branding & event plng; Fox Movie Channel: Chuck Saffler, sr VP & gm; Adam Lewinsohn, VP-prog; Fox Reality: David Lyle, chief operating officer & gm; Bob Boden, VP-prog; David Nathanson, VP-bus & operations; Lorey Zlotnick, VP-mktg; Fox Sports en Espanol: David Sternberg, exec VP & gm; Raul de Quesada, asst gm & sr VP; Patrick Ilabaca, dir-mktg & comms.

TBWA Worldwide, San Francisco. Michael Chamberlain, mg super. — FSN.

In-house. — FSN, Fox Reality, Fox Soccer Channel, Fox Sports en Espanol, Fuel, FX, National Geographic Channel, Speed Channel.

Union, New York. Nelson Martinez, ptrn. — National Geographic Channel.

Communication Trends, Atlanta. Lynette Fine, VP-acct svcs. — media buying, Fox Cable Networks Group, Fox Soccer Channel, Fox Sports en Espanol.

Media Storm, S. Norwalk, Conn. Craig Woerz, mg ptrn. — media buying, FX.

MPG, Miami & New York. Jorge Percovich, exec VP & mg dir-MPG Diversity. — media buying.

Fox Filmed Entertainment: 10201 W. Pico Blvd., Los Angeles, Calif. 90035/Phone: (310) 277-2211. Jim Gianopolous, chmn; Tom Rothman, chmn; Robert Harper, vice chmn, Twentieth Century Fox & exec VP-Fox Filmed Entertainment; Bruce Snyder, pres-domestic distribution; Pamela Levine, co-pres, domestic distribution theatrical mktg; Tony Sella, co-pres, domestic distribution theatrical mktg; Elizabeth Gabler, pres-Fox 2000 Pictures; Chris Meledandri, pres-Animation; Peter Rice, pres-Fox Searchlight; Cheryl Idell, exec VP-media & mktg plng.

MindShare Worldwide, New York. Alison Kmetko, ptrn & strategic planning dir. — 20th Century Fox, 20th Century Fox Animation, 20th Century Fox Television, Fox 2000 Pictures, Fox Searchlight Pictures.

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Fox News: 1211 Ave. of the Americas, New York, N.Y. 10036/Phone: (212) 301-3000. Roger Ailes, chmn & CEO; Jack Abernathy, exec VP; Paul Rittenberg, sr VP-ad sls.

In-house. Michael Tammero, sr mgr-mktg.

Fox Television Stations: 1999 S. Bundy Dr., Los Angeles, Calif. 90025-5235/Phone: (310) 584-2000. Lachlan Murdoch, chmn & CEO; Jim Burke, pres-sls; Tom Herwitz, pres-station ops; Leslie Lyndon, VP-adv & promo; Lori Terwell Asbury, VP-adv & promo.

No agency.

HarperCollins Publishers: 10 E. 53rd St., New York, N.Y. 10022/Phone: (212) 207-7000. Jane Friedman, pres & CEO; Glenn D' Agnes, exec VP & chief operating officer.

In-house. Laurie Rippon, sr VP & creative dir; Rockelle Henderson, dir-adv & promo. — co-op & niche mktg.

New York Post: 1211 Ave. of the Americas, New York, N.Y. 10036/Phone: (212) 930-8000. Lachlan Murdoch, publisher; Geoff Booth, VP & gm; Vin Montuori, VP-mktg.

In-house. Kenneth Kiczales, natl adv mgr; Lisa Barnett, promo dir.

Merkley & Partners, New York. Alex Gellert, ptnr & CEO.

News America Marketing: 1211 Ave. of the Americas, 5th Fl., New York, N.Y. 10036/Phone: (212) 782-8000. Paul V. Carlucci, CEO; Chris Mixson, pres; Eugene Klein, chief operating officer; Martin Garafalo, exec VP-retail; Jesse Aversano, sr VP-mktg & bus mgmt.

In-house.

The Weekly Standard: 1150 17th St., NW, Ste. 505, Washington, 20036/Phone: (202) 293-4900. Terry Eastland, publisher; Lauren Trotta Husted, circulation dir; Nicholas H.B. Swezey, adv & mktg mgr.

BMD, Alexandria, Va. Chris Prichard, VP. — direct mktg.

64 Nextel Communications

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$4,016	\$6,038	-33.5
Sunday magazine	7,818	NA	NA
B2B magazine	3,233	3,052	5.9
Local magazine	6	12	-50.0
Spanish-language magazine	288	NA	NA
Newspaper	144,403	137,096	5.3
National newspaper	13,406	13,469	-0.5
Spanish-language newspaper	1,993	700	184.7
Network TV	73,715	52,190	41.2
Spot TV	5,723	4,238	35.0
Syndicated TV	NA	223	NA
Cable TV network	39,014	11,289	245.6
Spanish-language TV	25	1,078	-97.7
Network radio	NA	500	NA
National spot radio	19,944	14,859	34.2
Outdoor	17,844	19,131	-6.7
Internet	8,270	2,559	223.2
Measured media	339,698	266,434	27.5
Unmeasured media	236,060	159,553	48.0
Total	575,758	425,987	35.2

By brand	2004	2003	% chg
Nextel	339,694	266,098	27.7

Sales & earnings (\$ in millions)

Worldwide & N. Amer.	2004	2003	% chg
Sales	\$13,368	\$10,820	23.5
Earnings	3,000	1,511	98.5

Headquarters

Nextel Communications/2001 Edmund Halley Dr., Reston, Va. 20191/Phone: (703) 443-4000.

Notes

Sprint and Nextel are expected to merge in August 2005.

Personnel, brands, agencies

Corporate: Timothy M. Donahue, pres & CEO; Mark Schweitzer, sr VP-mktg.

TBWA/Chiat/Day, New York. Robert Birge, acct exec. — Nextel

MindShare Worldwide, New York. Brian Huges, sr ptnr & strategic plng dir. — media svcs, Nextel.

65 Nike

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$76,812	\$75,605	1.6
Sunday magazine	1,373	1,320	4.0
B2B magazine	203	98	107.1
Local magazine	70	82	-14.6
Spanish-language magazine	NA	23	NA
Newspaper	808	594	36.0
National newspaper	1,806	389	364.3
Spanish-language newspaper	5	5	0.0
Network TV	74,876	80,317	-6.8
Spot TV	2,156	1,739	24.0
Syndicated TV	5,165	6,346	-18.6
Cable TV network	45,955	40,532	13.4
Spanish-language TV	788	1,149	-31.4
National spot radio	1,922	3,009	-36.1
Outdoor	2,022	3,275	-38.3
Internet	6,187	3,356	84.4
Measured media	220,148	217,839	1.1
Unmeasured media	353,765	326,758	8.3
Total	573,913	544,597	5.4

By brand	2004	2003	% chg
Nike	203,139	202,986	0.1
Cole-Haan	11,664	9,101	28.2

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$12,253	\$10,697	14.5
Earnings	946	474	99.6

U.S.	2004	2003	% chg
Sales	4,794	4,658	2.9

Division sales	2004	2003	% chg
Footwear	6,570	5,983	9.8
Apparel	3,545	3,130	13.3
Other brands	1,387	921	50.6
Equipment	751	663	13.3

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Headquarters

Nike/1 Bowerman Dr., Beaverton, Ore. 97005-6403/Phone: (503) 671-6453.

Personnel, brands, agencies

Corporate: Philip H. Knight, chmn; William Perez, pres & CEO; Gary M. DeStefano, pres-U.S. ops; Trevor Edwards, VP-global brand mktg; Joaquin Hidalgo, VP-U.S. mktg & brand mgmt; Nancy Monsarrat, dir-U.S. adv.

Wieden & Kennedy, Portland, Ore. Rebecca VanDyck, acct dir; Lawrence Teherani-Ami, media dir. — Nike shoes & apparel.

R/GA, New York. Matt Howell, exec producer. — interactive mktg, multichannel & multicultural mktg, e-commerce devel, Nike Global, Nike Gridiron (US Football), Nike Basketball, Nike Goddess, Nike Lab, Nike Running.

Bauer Nike Hockey: 150 Ocean Rd., Greenland, N.H. 03840/Phone: (603) 430-2111. Chris Zimmerman, pres & CEO; Chris Lindner, VP-mktg.

Olson & Co., Minneapolis. Bob Molhoek, acct dir & VP; Kevin DiLorenzo, mg dir & sr VP; Brian Kroening, exec creative dir & sr VP. — Bauer brand.

Cole Haan: 1 Cole Haan Dr., Yarmouth, Maine 04096/Phone: (207) 846-2500. Matthew E. Rubel, chmn & CEO; Gordon Thompson III, exec VP & creative dir; Jim Clopton, sr VP-sls; Bill Zeitz, VP-brand mktg.

Lloyd & Co., New York. Jodi Sweetbaum, acct exec. — Cole Haan.

Media Works, Boston. Debbie Haggerty, VP-media. — media buying, Cole Haan.

Converse: 1 High St., N. Andover, Mass. 01845-2601/Phone: (978) 983-3300. Marsden S. Cason, chmn; Jack A. Boys, CEO; David M. Maddocks, VP-mktg & prod devel.

Butler, Shine, Stern & Partners, Sausalito, Calif. John Sheehan, acct dir. — Converse.

Exeter Brands Group: 1350 Broadway, Ste. 300, New York, N.Y. 10018/Phone: (212) 457-3073. Mary Gleason, pres; Dan Pincus, mgr-mktg; David O'Donnell, dir-creative.

In-house. — Asphalt Legend, Starter, Shaq/Dunkman, Team Starter.

Hurley International: 1945-G Placentia Ave., Costa Mesa, Calif. 92627/Phone: (949) 548-9376. Robert Hurley, CEO; Seth Ellison, pres.

No agency.

16 Nissan Motor Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$231,747	\$216,596	7.0
Sunday magazine	5,444	3,590	51.6
B2B magazine	811	1,364	-40.5
Local magazine	715	960	-25.5
Spanish-language magazine	438	770	-43.1

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Newspaper	81,095	33,716	140.5
National newspaper	11,176	19,228	-41.9
Spanish-language newspaper	677	188	260.1
Network TV	231,287	249,408	-7.3
Spot TV	389,701	320,141	21.7
Syndicated TV	8,386	9,995	-16.1
Cable TV network	83,881	66,249	26.6
Spanish-language TV	8,386	6,092	37.7
Network radio	3,714	2,215	67.7
National spot radio	851	828	2.8
Outdoor	28,977	32,257	-10.2
Internet	6,038	5,020	20.3
Measured media	1,093,324	968,617	12.9
Unmeasured media	446,568	341,248	30.9
Total	1,539,892	1,309,865	17.6
By brand	2004	2003	% chg
Nissan	901,047	782,325	15.2
Infiniti	192,275	186,275	3.2

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$79,818	\$63,641	25.4
Earnings	4,768	4,315	10.5
North America	2004	2003	% chg
Sales	34,681	28,089	23.5
Operating income	3,868	3,425	12.9
Division sales	2004	2003	% chg
Automotive	76,110	60,589	25.6
Financing	3,708	3,052	21.5

Headquarters

Nissan Motor Co./17-1, Ginza 6-chome, Chuo-ku, Tokyo, Japan 104-8023/Phone: 81-3-3543-5523.

Nissan North America, 18501 S. Figueroa St., P.O. Box 191, Gardena, Calif. 90248-0191/Phone: (310) 532-3111.

Notes

In October 2004 Nissan North America selected Vidal Partnership, New York as its Hispanic agency for the Nissan brand over incumbent Ornelas & Associates, Los Angeles.

Personnel, brands, agencies

Corporate: Carlos Ghosn, pres & CEO; Norio Matsumura, exec VP mktg; Steve Wilhite, sr VP-global mktg; Nissan North America: Jed Connelly, sr VP-sls & mktg; John Rinek, dir-media & agency mgmt; Jan Thompson, VP-mktg; Yuhei Takahashi, VP-pricing, research & brand mgmt; Karen Gustafson, sr mgr-media; Lisa LaCasse, sr mgr-media & multicultural media.

Infiniti Division: 18600 S. Figueroa St., Gardena, Calif. 90248-0191/Phone: (310) 532-3111. Mark Igo, VP & gm; Scott Fessenden, dir-mktg.

TBWA Worldwide, Los Angeles. Tom Blessington, mg dir. — Infiniti vehicles.

OMD Worldwide, Los Angeles. Rich Rivera, acct dir-Los Angeles; Carmine Parisi, acct dir-New York. — media svcs.

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Nissan Division: 18600 S. Figueroa St., Gardena, Calif. 90248-0191/Phone: (310) 532-3111. Mark McNabb, VP & gm; Fred Suckow, dir-mktg; Kim McCullough, corp mgr-adv.

TBWA Worldwide, Los Angeles. Tom Blessington, mg dir. — Nissan vehicles.

OMD Worldwide, Los Angeles. Rich Rivera, acct dir-Los Angeles; Carmine Parisi, acct dir-New York. — media svcs.

Vidal Partnership, New York. Sandra Alfaro, VP & acct dir. — Hispanic adv.

True Agency, Los Angeles. Valencia Gayles, chief operating officer. — African-American adv.

21 Novartis

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$92,083	\$81,824	12.5
Sunday magazine	2,609	2,910	-10.3
B2B magazine	2,613	1,906	37.1
Spanish-language magazine	197	240	-17.9
Newspaper	1,476	2,315	-36.2
National newspaper	4,049	3,325	21.8
Spanish-language newspaper	36	34	5.9
FSI	4,787	3,750	27.7
Network TV	239,657	142,768	67.9
Spot TV	8,986	23,026	-61.0
Syndicated TV	41,413	26,661	55.3
Cable TV network	165,304	96,465	71.4
Spanish-language TV	36	NA	NA
Network radio	677	3,961	-82.9
National spot radio	2,226	2,180	2.1
Outdoor	1,652	32	NA
Internet	15,052	3,370	346.6
Measured media	582,853	394,767	47.6
Unmeasured media	701,740	562,242	24.8
Total	1,284,593	957,009	34.2
By brand	2004	2003	% chg
Zelnorm	124,055	48,110	157.9
Lamisil	109,722	67,791	61.9
Elidel	90,493	68,297	32.5
Gerber	65,347	49,922	30.9
Novartis corporate	58,971	11,175	427.7
Night & Day contact lenses	26,573	14,087	88.6
Triaminic	21,256	17,578	20.9
Maalox	16,643	15,248	9.1
Benefiber	11,140	10,854	2.6
Theraflu	11,002	7,981	37.9
Gas-X	10,704	9,824	9.0

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$28,247	\$24,864	13.6
Earnings	5,767	5,016	15.0
U.S.	2004	2003	% chg
Sales	11,299	10,194	10.8
Division sales	2004	2003	% chg
Pharmaceuticals	18,361	15,913	15.4
Consumer health	9,886	8,951	10.4

Headquarters

Novartis/Lischstrasse 35, Basel, Switzerland CH 4002/Phone: 41-61-324-1111.

Novartis/Novartis Corp., 608 Fifth Ave., New York, N.Y. 10020/Phone: (212) 307-1122.

Notes

Swiss drug maker Novartis in April 2004 lost out in its bid to enter merger negotiations with French-German pharmaceutical company Aventis, the latter opting for a merger with Paris-based Sanofi-Synthelabo which sweetened its initial unwanted bid of \$59 billion to \$65 billion. The French government was against the Novartis deal, preferring one that would keep the pharmaceutical business based in France.

Personnel, brands, agencies

Corporate: Daniel Vasella, chmn & CEO.

MindShare Worldwide, New York. Beth LeMessurier, sr ptrn & strategic plng dir. — media svcs.

CIBA Vision Corp.: 11460 Johns Creek Pkwy., Duluth, Ga. 30155/Phone: (678) 415-4255. Joseph T. Mallof, CEO; Karen Gough, pres-Americas region; Julie Collins, dir-cons mktg.

Grey Worldwide, New York. Carol Irgang, exec VP & global acct dir. — Focus Dailies, Night & Day, O2 Optix contact lenses.

Gerber Products Co.: 200 Kimball Dr., Parsippany, N.J. 07054/Phone: (973) 503-8000. Kurt T. Schmidt, pres; David Yates, sr VP-sls & mktg, N. Amer..

Noble BBDS, Chicago. Elizabeth Sanderson, pres. — Gerber baby foods, Gerber Wellness.

Novartis Animal Health U.S.: 3200 Northline Ave., Ste. 300, Greensboro, N.C. 27408/Phone: (336) 387-1000. Robert W. Jones, pres & CEO.

In-house.

Novartis Consumer Health: 200 Kimball Dr., Parsippany, N.J. 07054-0622/Phone: (973) 503-7760. Paul Choffat, CEO; Lynne Millheiser, sr VP-OTC bus unit.

Euro RSCG Life MetaMax, New York. Doug Burcin, pres. — Benefiber.

Euro RSCG Worldwide, New York. Larry Pollare, acct dir. — Benefiber, Nicotinell.

Grey Worldwide, New York. Lynn Janovsky, sr VP-acct mgmt. — Ex-Lax, Gas-X, Lamisil AT, Maalox, Transderm Scop.

Saatchi & Saatchi, New York. Scott Buckley, global equity dir. — Theraflu, Triaminic.

Novartis Pharmaceuticals Corp.: 1 Health Plaza, East Hanover, N.J. 07936/Phone: (973) 781-8265. Paulo Costa, head-Americas; Deborah Dick-Rath, exec dir-global adv; Kurt Graves, chief mktg officer.

CommonHealth, Morristown & Parsippany, N.J. Matt Giegerich, pres & CEO; Bruce Epstein, pres-Noesis (a CommonHealth co.); Nancy Barlow, pres-Xchange (a CommonHealth co.). — Transplant franchise, Visudyne.

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Deutsch, New York. Val Di Febo, mg ptnr & gm. — Lamisil Tablets, Zelnorm, Diovan.

Integrated Communications Corp., Parsippany, N.J. Steve Vivano, pres; Marcy Leger, exec VP & mgmt super. — Diovan, Famvir, Lamisil, Lotrel, Starlix, Zelnorm.

Merkley & Partners, New York. Susan Hermann, sr VP & gm-Healthworks. — Femara.

29 J.C. Penney Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$44,438	\$32,769	35.6
Sunday magazine	5,270	2,588	103.6
B2B magazine	495	357	38.7
Spanish-language magazine	155	165	-6.1
Newspaper	137,162	127,127	7.9
National newspaper	1,556	893	74.2
Spanish-language newspaper	945	1,268	-25.5
FSI	1,436	1,934	-25.7
Network TV	120,332	143,247	-16.0
Spot TV	860	1,383	-37.8
Syndicated TV	6,091	787	674.0
Cable TV network	34,914	35,262	-1.0
Spanish-language TV	14,744	19,919	-26.0
Network radio	16,089	24,422	-34.1
National spot radio	8,151	10,734	-24.1
Outdoor	284	279	1.8
Internet	46,657	35,857	30.1
Measured media	439,579	438,991	0.1
Unmeasured media	655,778	601,621	9.0
Total	1,095,357	1,040,612	5.3
By brand	2004	2003	% chg
J.C. Penney	430,388	428,162	0.5

Sales & earnings (\$ in millions)

Worldwide & U.S.	2004	2003	% chg
Sales	\$18,424	\$17,786	3.6
Earnings	524	-928	NA
Division sales	2004	2003	% chg
J.C. Penney dept store/catalog	18,424	17,786	3.6

Headquarters

J.C. Penney Co./6501 Legacy Dr., Plano, Texas 75024-3698/Phone: (972) 431-1000.

Notes

J.C. Penney in July 2004 sold its troubled Eckerd Drug Stores to CVS Corp. and Jean Coutu Group for \$4.7 billion. Financial returns in the profile exclude returns for Eckerd for both years. Eckerd, bought by the retailer in 1996, grew to 2,600 stores and 20 states but suffered heavy losses in 2003 on sales of \$15.1 billion.

Personnel, brands, agencies

Corporate: Mike Ullman, chmn & CEO; Ken Hicks, chmn, pres & chief mktg officer-J.C. Penney stores, catalog & Internet; Mike Boylson, exec VP & chief mktg officer; Michael Cape, VP & dir-brand mktg; Leslie Palmer, VP & dir-creative svcs; Todd Beurman,

natl adv dir; Robin Thomas, natl media mgr; Merle Davidson, local market media dir; Merianne Roth, brand mktg & publicity dir; Manny Fernandez, mgr-multicultural & specialty mktg support; Joseph Abbati, graphic design & packaging dir.

DDB Worldwide Communications, Chicago & Dallas. David Polston, sr VP & grp acct dir.

OMD Worldwide, Dallas & Chicago. Scot Butler, acct dir-Chicago. — media plng, bdcst & print buying.

American Communications Group, Torrance, Calif. Christopher Cope, pres; William Gamble, VP & acct super. — media buying-newspaper.

Dieste, Harmel & Partners, Dallas. David Ravelo, exec dir; Tony Dieste, CEO; Warren Harmel, pres; Edgar Cardoze, exec media dir. — Hispanic adv.

InterTrend Communications, Long Beach, Calif. Julia Huang, pres & CEO; Wade Huang, acct dir; Rita Cheng, sr acct super. — Asian-American adv.

22 PepsiCo

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$115,251	\$105,183	9.6
Sunday magazine	5,345	2,206	142.3
B2B magazine	2,095	1,614	29.8
Local magazine	6	13	-53.8
Spanish-language magazine	122	69	76.8
Newspaper	10,063	5,882	71.1
National newspaper	3,262	1,462	123.1
Spanish-language newspaper	537	354	51.7
FSI	3,134	2,959	5.9
Network TV	379,490	423,183	-10.3
Spot TV	75,137	68,796	9.2
Syndicated TV	39,270	41,270	-4.8
Cable TV network	144,254	130,367	10.7
Spanish-language TV	58,695	76,276	-23.0
Network radio	921	110	737.3
National spot radio	6,074	4,716	28.8
Outdoor	8,398	4,290	95.8
Internet	9,349	24,136	-61.3
Measured media	861,403	892,886	-3.5
Unmeasured media	400,757	317,654	26.2
Total	1,262,160	1,210,540	4.3
By brand	2004	2003	% chg
Pepsi	211,654	236,396	-10.5
Quaker	142,251	121,265	17.3
Gatorade	141,622	130,993	8.1
Sierra Mist	60,327	64,129	-5.9
Mountain Dew	57,803	60,555	-4.5
Tropicana	55,274	75,403	-26.7
Lays	45,024	20,763	116.8
Propel	37,606	33,998	10.6
Doritos	27,491	8,657	217.6
Tostitos	26,885	30,213	-11.0
Aquafina	22,037	24,647	-10.6

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Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$29,261	\$26,971	8.5
Earnings	4,212	3,568	18.0
U.S.	2004	2003	% chg
Sales	18,329	17,377	5.5
U.S. Income before income taxes	2,946	3,267	-9.8
Division sales	2004	2003	% chg
PepsiCo International	9,862	8,678	13.6
Frito-Lay North America	9,560	9,091	5.2
PepsiCo Beverages N. Amer.	8,313	7,733	7.5
Quaker Foods North America	1,526	1,467	4.0

Headquarters

PepsiCo/700 Anderson Hill Rd., Purchase, N.Y. 10577/Phone: (914) 253-2000.

Notes

PepsiCo purchased General Mill's 40.5% share held in their Snacks Venture Europe operation in December 2004, making the venture formed in 1992 a PepsiCo subsidiary. General Mills got \$750 million in the deal which it used to pay down debt.

Personnel, brands, agencies

Corporate: Steve Reinemund, chmn & CEO.

Frito-Lay North America: 7701 Legacy Dr., Plano, Texas 75024/Phone: (972) 334-7000. Irene B. Rosenfeld, chmn & CEO, Frito-Lay.

BBDO Worldwide, New York. Tom Sebok, exec VP & mg dir. — 3D's, Baked Lay's, Cheetos, Crispy mini snacks, Doritos, fruit & oatmeal bars, Gatorade energy bar, Lay's, Quaker Chewy granola bars, Rold Gold, Ruffles.

GSD&M, Austin, Texas. David Eiben, acct dir. — Tostitos.

OMD Worldwide, New York. Chris Hoopes, acct dir; John Swift, acct dir. — media svcs.

Tribal DDB, New York. Kevin Hall, acct dir. — interactive mktg.

Dieste, Harmel & Partners, Dallas. Paul Traeger, acct dir. — Hispanic adv.

Element 79 Partners, Chicago. Lisa Groot, acct dir. — Cracker Jack, Chewy Granola Bars, Fruit & Oatmeal Bars.

North American Coffee Partnership (joint venture with Starbucks Coffee):

Fallon Worldwide, New York. Mark Strong, acct dir; Dominique Sanderson, acct dir. — Bottled Frappuccino, Starbucks DoubleShot.

Pepsi Cola North America: 700 Anderson Hill Rd., Purchase, N.Y. 10577/Phone: (914) 253-2000. Dawn Hudson, CEO.

BBDO Worldwide, New York. Cathy Israelevitz, sr VP & sr acct dir. — Aquafina, Code Red, Diet Mountain Dew, Diet Pepsi, Diet Sierra Mist, Mountain Dew, Mug root beer, Pepsi-Cola, Pepsi ONE, Pepsi Twist, Wild Cherry Pepsi.

DDB Worldwide Communications, New York. Peter Hempel, mg dir. — Diet Pepsi.

Tribal DDB, New York. Christian Deitrich, acct dir. — interactive mktg.

Dieste, Harmel & Partners, New York. Jaime Gonzalez-Mir, gm. — Hispanic adv.

Spike DDB, New York. Richard Schropschier, acct dir. — African-American adv.

TracyLocke, Dallas. Ed Winter, CEO. — sls promo, materials, merchandising & radio-Pepsi.

Quaker, Tropicana & Gatorade (QTG): 555 W. Monroe St., Chicago, Ill. 60661/Phone: (312) 821-1000. John Compton, CEO & pres-QTG.

Element 79 Partners, Chicago. John Fraser, acct dir; Nicole Guisto, acct dir; Kim Noles, acct dir. — Aunt Jemima, Cap'n Crunch, Dole Juices, Gatorade, Life Cereal, new prods, Propel Fitness Water, Quaker Hot Cereals, Quakes, Rice-A-Roni, Toasted Oatmeal Squares, Juices, Tropicana, Tropicana Twister.

OMD Worldwide, New York & Chicago. Gail Stein, acct dir; John Swift, acct dir; Bob Porcaro, acct dir. — media plng, Quaker, Tropicana, Gatorade.

Dieste, Harmel & Partners, Dallas. Salma Gottfried, exec dir. — Hispanic adv.

Tribal DDB, Chicago. Paul Gunning, gm. — interactive mktg.

SoBe Beverage: 40 Richards Ave., Norwalk, Conn. 06854/Phone: (203) 899-7111. Scott Moffitt, VP & gm; Tom Smallhorn, VP-mktg; Nicole Flavin, brand dir-SoBe 20 oz.; David Luks, brand mgr-SoBe energy.

Fallon Worldwide, New York. Lisa Clunie, acct dir. — SoBe 20 oz..

Jager Di Paola Kemp Design, Burlington, Vt. — Sobe Adrenaline Rush.

4 Pfizer

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$243,308	\$219,689	10.8
Sunday magazine	10,285	10,301	-0.2
B2B magazine	3,764	2,477	52.0
Local magazine	32	8	300.0
Spanish-language magazine	731	1,230	-40.6
Newspaper	12,890	14,819	-13.0
National newspaper	8,897	9,553	-6.9
Spanish-language newspaper	667	94	609.6
FSI	7,315	9,909	-26.2
Network TV	417,803	441,926	-5.5
Spot TV	33,500	29,800	12.4
Syndicated TV	110,703	84,900	30.4
Cable TV network	150,288	147,125	2.1
Spanish-language TV	8,836	16,979	-48.0
Network radio	26,137	26,400	-1.0
National spot radio	1,276	2,223	-42.6
Outdoor	846	90	840.0
Internet	23,851	11,502	107.4
Measured media	1,061,129	1,029,025	3.1
Unmeasured media	1,896,135	1,652,858	14.7
Total	2,957,264	2,681,883	10.3

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By brand	2004	2003	% chg
Celebrex	114,214	87,525	30.5
Lipitor	112,094	110,929	1.1
Viagra	97,996	112,018	-12.5
Listerine	86,936	78,333	11.0
Zoloft	84,371	115,240	-26.8
Zyrtec	84,199	99,171	-15.1
Aricept	53,792	44,314	21.4
Relpax	39,998	964	4051.4
Detrol	38,575	29,850	29.2
Benadryl	37,089	42,505	-12.7
Neosporin	35,431	15,940	122.3
Sudafed	33,403	35,550	-6.0
Pfizer	25,693	31,681	-18.9
Visine	24,399	23,121	5.5
Roloids	21,864	20,406	7.1
Zantac 75	21,311	19,830	7.5
Rogaine	16,660	15,652	6.4
Lubriderm	15,505	17,536	-11.6
Ben Gay	14,925	10,137	47.2
Ept	14,887	13,084	13.8
Sudacare Nghtime Vaporizer ..	14,035	0	NA
Overactive Bladder Condition ..	11,133	9,864	12.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$52,516	\$44,736	17.4
Earnings	11,361	3,190	256.1
U.S.	2004	2003	% chg
Sales	29,539	26,795	10.2
Division sales	2004	2003	% chg
Human Health	46,133	39,425	17.0
Consumer Healthcare	3,516	2,949	19.2
Animal Health	1,953	1,598	22.2
Corporate/Other	914	764	19.6

Headquarters

Pfizer/235 E. 42nd St., New York, N.Y. 10017/Phone: (212) 573-2323.

Personnel, brands, agencies

Corporate: Henry A. McKinnell, chmn & CEO; Jeff Kindler, vice chmn; Karen Katzen, vice chmn; David Shedlarz, vice chmn.

Berlin Cameron/Red Cell, New York. Andy Berlin, chmn. — Pfizer.

Mediaedge:cia, New York. Rob Norman, ww CEO, MEC Interaction. — media svcs.

Dieste, Harmel & Partners, New York. Jaime Gonzalez-Mir, gm. — Hispanic adv.

Glover Park Group, Washington.

Animal Health Group: 150 E. 42nd St., New York, N.Y. 10017/Phone: (212) 573-2323. Pedro Lichtinger, pres-Animal Health Group.

Charleston/Orwig, Hartland, Wis. Lyle Orwig, CEO; Marcy Tessmann, acct grp dir. — Livestock products.

Rhea & Kaiser Marketing Communications, Naperville, Ill. Kim Cooke, VP & acct mgmt super; Diane Martin, VP & acct mgmt super. — Large animal, companion animal.

Pfizer Consumer Healthcare: 201 Tabor Rd., Morris Plains, N.J. 07950/Phone: (973) 385-2000. Marc E. Robinson, pres; Gordon Knapp, pres-N. Amer.; Paul Sturman, sr VP-mktg- U.S., Canada & Caribbean; Kaki Hinton, VP-adv svcs.

atmosphereBBDO, New York. Andreas Combuechen, CEO & chief creative officer. — Lubriderm, Nicotrol, Prograine, Rogaine.

BBDO Worldwide, New York. Anne Devereux, exec VP & mg dir. — Lubriderm, Rogaine.

JWT, New York. Howard Courtemanche, U.S. acct dir. — Actifed, Anusol, Benadryl franchise, Ben-Gay, Benylin, Cortisone, Desitin, Dramamine, Efferdent, e.p.t., Kaopectate, Listerine, Listerine Essential Care Toothpaste, Listerine Pocket Paks, Ludens, Neosporin franchise, PediaCare, Purell, Roloids, Sinutab, Sudacare, Sudafed, Tucks hemorrhoid aid, Unisom, Visine, Zantac.

CommonHealth, Wayne, Colo. Matt Giegerich, pres & CEO; Guy Dess, pres-Adient. — cons awareness adv, Listerine Global, Listerine, Zantac75, Rogaine, Nicotrol.

Pfizer Pharmaceuticals Group: 235 E. 42nd St., New York, N.Y. 10017/Phone: (212) 573-2323. J. Patrick Kelly, pres-U.S. Pharmaceuticals.

Arnold Worldwide, New York. Tim O'Hare, grp acct dir. — DTC Advertising, Relpax.

Berlin Cameron/Red Cell, New York. Andy Berlin, chmn. — Zyrtec.

Cline Davis & Mann, New York. Carole Di Santo, exec VP & dir-client svcs.. — relationship mktg, Caduet.

Euro RSCG Life LM&P, New York. Carmine Laliberte, pres; Robert Levine, exec VP & dir-client svcs. — Bextra, Dostinex, Dynastat, Genotropin, Inspira, Lasofoxi-fene, Lyrica, Somavert, Varenicline.

Kaplan Thaler Group, New York. Robin Koval, chief mktg officer & gm. — Zoloft, Celebrex.

McCann Erickson Worldwide, New York. Andrew Schirmer, exec VP-McCann HumanCare. — Bextra, Viagra.

Merkley & Partners, New York. Peter Fekula, grp acct dir. — Lipitor.

Saatchi & Saatchi Healthcare, New York. Bob Hogan, exec VP & mg dir. — Detrol.

Medicus Group International, New York. Steve Trask, VP & grp acct dir. — Macugen.

Carat Americas, New York. Charles Rutman, pres. — media svcs.

Burson-Marsteller, New York. — PR, Pregabalin.

Chandler Chicco Agency, New York. Judi Kennedy, acct dir. — PR, Zoloft, Geodon, varenicline.

CommonHealth, Wayne, N.J. Matt Giegerich, pres & CEO-CommonHealth; Guy Dess, pres-Adient (professional). — Listerine (professional), Listerine Pocket Paks (professional), Zantac 75 (professional).

Digitas, Boston. Seth Solomons, sr VP-mktg. — relationship mktg, Rebif, Spiriva, Viagra.

Edelman, New York. Nancy Turett, acct dir. — PR, ophthalmology, oncology, Zyvox, Vfend, public affairs.

izi, Denise D'Agostino, acct dir. — relationship mktg, Lipitor.

LLKFB, New York. Ross Quinn, acct dir; Paul Steiner, acct dir. — relationship mktg, Detrol, Bextra, Celebrex, Lipitor, Lyrica.

Makovsky & Co., New York. Ken Makovsky, pres. — PR, endocrinology.

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Manning, Selvage & Lee, New York. Wendy Lund, acct dir. — PR, Aricept.

Marina Maher Communications, New York. Charry Dumaul, acct dir; Marina Maher, acct dir. — PR, Relpax, Detrol, lasofoxi-fene.

Ogilvy & Mather Worldwide, New York. Sherry Pudlowski, acct dir. — PR, Celebrex, Zyrtec.

OgilvyOne Worldwide, New York. Belinda Ward, acct dir. — relationship mktg, Zoloff, Relpax.

Pace, Parsippany, N.J. Nina Wachsmann, acct dir. — relationship mktg, Xalatan.

Weber Shandwick, New York. Laura Schoen, acct dir. — PR, Viagra, Spiriva.

WPP Health Success, New York. Kathryn Metcalfe, acct dir. — PR, CV franchise.

2 Procter & Gamble Co.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$619,725	\$594,313	4.3
Sunday magazine	33,478	28,333	18.2
B2B magazine	5,395	6,748	-20.1
Local magazine	61	5	NA
Spanish-language magazine	6,829	10,180	-32.9
Newspaper	17,339	46,405	-62.6
National newspaper	2,348	7,588	-69.1
Spanish-language newspaper	132	849	-84.5
FSI	105,063	105,526	-0.4
Network TV	858,216	833,636	2.9
Spot TV	122,835	133,805	-8.2
Syndicated TV	340,309	329,164	3.4
Cable TV network	704,694	514,573	36.9
Spanish-language TV	132,373	145,792	-9.2
Network radio	23,199	26,378	-12.1
National spot radio	17,796	11,925	49.2
Outdoor	3,650	5,306	-31.2
Internet	12,185	12,430	-2.0
Measured media	3,005,627	2,812,956	6.8
Unmeasured media	914,053	538,236	69.8
Total	3,919,680	3,351,192	17.0
By brand	2004	2003	% chg
Olay	267,281	210,265	27.1
Crest	255,080	274,258	-7.0
Pantene	193,907	175,799	10.3
Clairol	189,470	237,636	-20.3
Mr. Clean	130,998	49,714	163.5
Swiffer	129,189	91,885	40.6
Febreze	124,204	42,152	194.7
Cover Girl	99,674	126,185	-21.0
Tide	89,421	78,040	14.6
Old Spice	79,147	51,743	53.0
Pampers	70,282	75,942	-7.5
Dayquil/Nyquil	68,946	47,837	44.1
Bounty Paper Towels	67,585	83,877	-19.4
Tampax	57,761	76,061	-24.1
Pringles	55,015	35,572	54.7
Secret Antiperspirant/Deod.	52,290	36,546	43.1

By brand	2004	2003	% chg
Sunny D	51,884	39,444	31.5
Charmin	50,871	50,381	1.0
Thermacare	50,460	54,124	-6.8
Iams	48,201	71,834	-32.9
Always	47,760	58,688	-18.6
Prilosec	46,837	34,338	36.4
Head & Shoulders	46,182	38,130	21.1
Dawn	44,733	68,494	-34.7
Downy	43,143	55,169	-21.8
Cascade	37,905	37,750	0.4
Pepto-Bismol	36,857	23,658	55.8
Actonel Osteoporosis Rx	36,783	523	6927.6
Procter & Gamble corporate	35,633	27,924	27.6
Max Factor	31,253	42,084	-25.7
Luvs	28,676	31,458	-8.8
Folgers	28,066	32,942	-14.8
Home Cafe Vignette	27,814	0	NA
Pur Water Filter System	27,215	40,914	-33.5
Infusium	24,437	22,471	8.7
Puffs	23,449	18,070	29.8
Zest	21,575	14,395	49.9
Gain	20,601	26,497	-22.3
Metamucil	20,339	31,541	-35.5
Noxzema	17,161	14,035	22.3
Vicks	16,463	14,600	12.8
Sure Antiperspirant/Deod.	15,921	15,899	0.1
Fixodent	12,285	14,635	-16.1
Cheer	12,224	16,746	-27.0
Eukanuba	10,202	9,479	7.6

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$51,407	\$43,377	18.5
Earnings	6,481	5,186	25.0
North America	2004	2003	% chg
Sales	23,688	21,853	8.4
Pre-tax income	6,023	4,920	22.4
Division sales	2004	2003	% chg
Beauty care	17,122	12,221	40.1
Fabric & home care	13,868	12,560	10.4
Baby, feminine & family care	10,718	9,933	7.9
Health care	6,991	5,796	20.6
Food & beverage	3,482	3,238	7.5

Headquarters

Procter & Gamble Co./1 Procter & Gamble Plaza, Cincinnati, Ohio 45202/Phone: (513) 983-1100.

Notes

P&G in late January 2005 made an offer to buy Gillette Co. for about \$57 billion in stock. Gillette's board approved the deal, which still must go through regulatory channels.

Personnel, brands, agencies

Corporate: A.G. Lafley, chmn, pres & chief exec; R. Kerry Clark, vice chmn-global health, baby & family care; Bruce L. Byrnes, vice chmn-global household care; Susan E. Arnold, vice chmn-global beauty care; Robert A. McDonald, vice chmn-global ops;

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James R. Stengel, global mktg officer; Ted Woehrl, VP-mktg N. Amer.

Grey Worldwide, New York. Neil Kreisberg, grp exec VP & exec mg dir. — Cover Girl, Downy, Febreze, Joy, Pantene, Pringles, Sure, Torengos, Zest.

Kaplan Thaler Group, New York. Joanne Miserandino, global acct dir. — Dawn, Swiffer.

Leo Burnett Worldwide, Chicago. Catherine Guthrie, exec VP & mg dir. — Always, Bounce, Cheer, Gain, Max Factor, Noxzema, Pert Plus, Secret antiperspirant, Tampax.

Medicus Group, New York. Sherri Goldstein, sr VP & grp acct dir; Lisa Ebert, sr VP & grp acct dir; Tracey O'Brien, VP & acct dir. — Asacol, Crest oral care, Intrinsa, Kinsale, Metamucil, Prilosec OTC, ThermaCare.

Publicis Healthcare Communications Group, New York. Sherri Goldstein, sr VP & grp acct dir; Lisa Ebert, sr VP & grp acct dir; Kathy Magnuson, exec VP & dir-client svcs. — Asacol, Intrinsa, Metamucil, oral care franchise, Prilosec OTC, ThermaCare (prof).

Publicis USA, New York. Gail Hollander, exec VP & global equity dir-P&G healthcare brands; Angela Pasqualucci, exec VP & global equity dir-P&G family brands. — Asacol, Bounty, Charmin, DayQuil, Metamucil, NyQuil, NyQuil cough, Pepto-Bismol, Prilosec, Puffs, ThermaCare, Vicks, Vicks VapoRub (cons).

Saatchi & Saatchi, Los Angeles. Chuck Maguy, acct dir; Chip Ross, acct super. — Pur water filtration systems.

Saatchi & Saatchi, New York. Vaughan Emsley, global equity dir. — Cascade, Cascade Complete, Lemon Scented Cascade, Liquid Cascade, Crest Healthy Smiles 2010 prog, Crest new prods, Crest Night Effects, Crest plus Scope, Crest toothbrushes, Crest toothpaste, Crest Whitestrips, Dreft, Eukanuba pet food, Fixodent, Folgers, Head & Shoulders, Iams pet food, Luvs, Millstone, Olay personal care cleansing prods, Olay skin care prods, Olay Vitamins, Old Spice deodorant & fragrance, Old Spice soap, Pampers, Plastic Booster, Safeguard, Scent Expression, Scope, Sunny Delight, Tide, Tide Clean Breeze, Tide Liquid, Tide Mountain Spring, Tide Unscented, Tide with Bleach.

Wieden & Kennedy, Portland, Ore. Dave Luhr, CEO & mg dir-Portland. — Eukanuba.

Carat Americas, New York. Martin Cass, comm plng dir. — media svcs, baby care, family care, pet care, snacks & beverage.

MediaCom, New York. Harvey Goldhersh, exec dir ww. — media plng, Actonel, Cover Girl, Downy, Febreze, Giorgio/Beverly Hills fine fragrances, Joy, Mr. Clean, Pantene, Pringles, Sure.

Starcom MediaVest, New York & Chicago. Richard Beaven, mg dir. — media svcs.

Bromley Communications, San Antonio. Linda L. Aguayo, acct dir. — Hispanic adv, Always, Bounty, Charmin, Dawn, DayQuil, NyQuil, Pepto-Bismol, Vicks VapoRub.

Burrell Communications Group, Chicago. Bob Kumaki, VP & acct grp dir. — African-American adv, Always, Bounty, Charmin, Crest, Folgers, Gain, Luvs, Pampers, Tampax, Tide.

Carol H. Williams Advertising, Oakland, Calif. Carol H. Williams, CEO. — African-American adv, Cover Girl, Downy, Pantene, Pringles.

Conill, New York. Roland Janisse, client svcs dir. — Hispanic adv, Crest, Dreft, Folgers, Head & Shoulders, Olay, Old Spice, Pampers, Tide.

Critical Mass, Chicago. John McLaughlin, acct exec. — interactive mktg, Pampers.

Leo Burnett Worldwide, Puerto Rico. Charles Neugebauer, acct dir. — Hispanic adv, Ace, Gain, Secret.

Publicis Dialog, New York. Amie Wilkening, sr VP-retail connections acct dir. — direct response TV, HomeCafe, ThermaCare.

WING Latino, New York. Jackie Bird, pres & CEO; Tony Dagnery, VP-bus devel. — Hispanic adv, Cover Girl, Downy, Febreze, Octanel, Pantene, Zest.

Clairol: 1 Blachley Rd., Stamford, Conn. 06922/Phone: (203) 357-5000. Rob Matteucus, pres.

Grey Worldwide, New York. Neil Kreisberg, grp exec VP & exec mg dir. — Clairol, Hydrience, Natural Instincts, Nice 'n Easy, Ultrass.

Kaplan Thaler Group, New York. Robin Koval, chief mktg officer & gm. — Aussie, Daily Defense, Herbal Essences, Infusium 23, Renewal 5X.

WING Latino, New York. Jackie Bird, pres & CEO; Tony Dagnery, VP-bus devel. — Hispanic adv, Clairol Hydrience, Clairol Nice 'n Easy.

Wunderman, New York. Amanda Rangaiah, VP & acct dir. — direct mktg.

96 Reckitt Benckiser

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$24,898	\$44,658	-44.2
Sunday magazine	1,726	2,779	-37.9
B2B magazine	1,163	1,080	7.7
Spanish-language magazine	11	155	-92.9
Newspaper	NA	1,062	NA
National newspaper	NA	138	NA
FSI	29,327	31,075	-5.6
Network TV	93,385	55,082	69.5
Spot TV	24,534	19,967	22.9
Syndicated TV	50,692	19,804	156.0
Cable TV network	77,098	69,546	10.9
Spanish-language TV	8,768	1,081	711.1
Network radio	1,143	479	138.6
National spot radio	174	931	-81.3
Internet	28	158	-82.3
Measured media	312,947	247,995	26.2
Unmeasured media	50,669	57,526	-11.9
Total	363,616	305,521	19.0
By brand	2004	2003	% chg
Lysol	86,411	46,416	86.2
Airwick	40,555	30,223	34.2
Adidas Personal Care	20,536	20,062	2.4
Neutra Air Air Freshener	20,129	15,682	28.4
Electrasol	19,301	18,897	2.1
Veet	18,043	10,311	75.0
Frenchs	15,937	13,522	17.9
Spray N Wash	14,576	22,184	-34.3
Lime-A-Way	12,200	8,120	50.2
Kenneth Cole Fragrances	11,584	9,159	26.5
Davidoff Fragrances	10,934	0	NA

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U.S. ad spending (\$ in thousands)

By brand	2004	2003	% chg
Healing Garden Fragrances . . .	10,877	9,250	17.6
Woolite Dark Fabric Wash . . .	10,460	1,522	587.2
Resolve Carpet Cleaner	10,371	9,064	14.4
Rimmel Cosmetics	10,117	3,526	186.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$7,118	\$6,109	16.5
Earnings	1,396	1,117	25.0
North America	2004	2003	% chg
Sales	2,199	1,969	11.7
Operating Profit	449	377	19.1
Division sales	2004	2003	% chg
Household, health & pers. prods .	6,769	5,790	16.9
Food	349	319	9.4

Headquarters

Reckitt Benckiser/103-105 Bath Rd., Sloth, Berkshire, United Kingdom SL1 3UH/Phone: 44-1753-217-800.

Reckitt Benckiser/Morris Corporate Center IV, 399 Interpace Pkwy., Parsippany, N.J. 07054/Phone: (973) 404-2829.

Personnel, brands, agencies

Corporate: Bart Becht, CEO.

MPG, New York. Sherry Pinkoff, sr VP & grp acct dir. — media buying.

Reckitt Benckiser North America: Morris Corporate Center IV, 399 Interpace Pkwy., Parsippany, N.J. 07054-0225/Phone: (973) 404-2600. Javed Ahmed, exec VP-N. Amer. & Australia & regional dir-N. Amer. Household; Elliott Penner, pres.-N. Amer. Food Division.

Euro RSCG Worldwide, New York. Marty Susz, ptr & grp acct dir. — Air Wick, d-Con, Electrasol, Finish, Frank's RedHot, French's Mustard, French's GourMayo, French's French Fried Onions, Jet Dry, Resolve, Spray n' Wash, Woolite.

JWT, New York. Ellen Hyde, U.S. acct dir. — Easy-Off, Glass Plus, Lime-A-Way, Lysol, Mop & Glo, Neutra Air, Old English, Rid-X, Veet.

EastWest Creative, New York. Cliff Medley, sr VP. — cons promo, Lysol, Old English, Electrosol, Jet Dry, Veet.

MPG, New York. Sherry Pinkoff, sr VP & grp acct dir. — media buying.

Cooper Katz, New York. Faye Nikolaidis, mgr-client svcs; Lesley Weiner, acct exec. — pr, Veet.

e-centives.com, Bethesda, Md. Amori Langstaff, acct dir. — interactive mktg.

Lippe Taylor, New York. Jamie Paulker, sr acct exec. — pr, Woolite.

Porter Novelli, New York. Holly Garman, acct dir. — pr, Lysol.

Ryan Partnership, Westport & Wilton, Conn. Paul Kramer, pres; Margaret Lewis, acct dir. — trade key events & cons promo.

Source Marketing, Westport, Conn. Randy Musiker, VP. — cons promo, French's Mustard, French's GourMayo, French's Worcestershire Sauce, French's French Fried Onions, French's Potato Sticks, Frank's RedHot, Cattlemens, Freakin' Nuts, AirWick, Spray 'n Wash, Woolite, Cling Free, Resolve, Vivid, Yes, Easy Off, Glass Plus, Mop & Glo, Lime-a-way, d-Con, Chore Boy.

79 SABMiller

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$39,815	\$24,483	62.6
B2B magazine	1,368	1,046	30.8
Spanish-language magazine	53	3	NA
Newspaper	11,063	5,784	91.3
National newspaper	1,589	177	797.7
Spanish-language newspaper	62	55	12.7
Network TV	118,527	92,726	27.8
Spot TV	15,319	24,496	-37.5
Syndicated TV	7,388	2,172	240.1
Cable TV network	63,144	42,408	48.9
Spanish-language TV	17,652	35,927	-50.9
Network radio	2,681	531	404.9
National spot radio	2,342	1,112	110.6
Outdoor	22,488	26,476	-15.1
Internet	2,674	15,814	-83.1
Measured media	306,165	273,210	12.1
Unmeasured media	164,857	160,990	2.4
Total	471,022	434,200	8.5
By brand	2004	2003	% chg
Miller beer	294,202	256,345	14.8

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$11,366	\$8,167	39.2
Earnings	645	296	117.9
North America	2004	2003	% chg
Sales	4,778	3,408	40.2
EBITA	424	250	69.6

Headquarters

SABMiller/1 Stanhope Gate, London, United Kingdom W1K 1AF/Phone: 44-20-7659-0100.

SABMiller/3939 W. Highland Blvd., Milwaukee, Wis. 53201/Phone: (414) 931-2000.

Personnel, brands, agencies

Corporate: Graham Mackay, CEO.

Miller Brewing Co.: 3939 W. Highland Blvd., Milwaukee, Wis. 53201/Phone: (414) 931-2000. Norman Adami, pres & CEO; Tom Long, exec VP & chief mktg officer; Douglas Brodman, sr VP-sls & distribution; Erv Frederick, VP & gm-Miller Trademark unit; Robert Brennan, grp dir-mktg svcs; Ed Gawronski, VP-mkt & bus insights.

Ogilvy & Mather Worldwide, New York. Jaime Prieto, ww grp dir. — Miller Trademark, Pilsner Urquell, Foster's.

Wieden & Kennedy, Portland, Ore. Lee Davis, acct dir. — Miller High Life, Miller Trademark.

Y&R, Chicago. Kary McIlwain, pres & CEO, Y&R Chicago. — Miller Trademark.

Martin Agency, Richmond, Va. — Miller trademark.

Mother, New York. Andrew Deitchman, acct dir; Linus Karlsson, acct dir. — Milwaukee's Best Light.

Starcom USA, Chicago. Chris Boothe, acct dir. — media buying.

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Agency.com, San Francisco. Mark Benson, client ptrn. — interactive mktg.

Bravo Group, New York. Victor Garcia-Bory, acct dir. — Hispanic adv, Miller Trademark.

Frankel (an Arc Worldwide co.), Chicago. Ken Hicks, VP & acct dir. — sls promo, Miller trademark.

GMR Marketing, Milwaukee. Todd Marble, acct dir. — sports & event mktg.

Marketing Store, New York. Mike Esposito, acct dir. — sls promo, Miller Trademark.

Schupp Co., St. Louis. Mark Schupp, pres. — experiential mktg.

Square One, Dallas. Jesse Bayer, acct dir. — Icehouse.

Team Enterprise, Cooper City, Fla. Dan Gregory, pres. — sls promo.

Upshot Marketing Group, Chicago. Brian Kristofek, pres. — sls promo, Miller Trademark, Foster's, Pilsner Urquell, Peroni.

Zubi Advertising Services, Coral Gables, Fla. Luis Villamil, acct dir. — Hispanic adv, Miller Trademark.

59 Safeway

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$1,955	\$1,691	15.6
B2B magazine	.89	NA	NA
Local magazine	.NA	7	NA
Newspaper	31,484	27,721	13.6
Spanish-language newspaper	.62	3	NA
FSI	324	273	18.7
Spot TV	40,691	24,670	64.9
Cable TV network	102	47	117.0
National spot radio	49,582	50,856	-2.5
Outdoor	3,113	1,999	55.7
Internet	113	463	-75.6
Measured media	127,515	107,730	18.4
Unmeasured media	478,157	427,953	11.7
Total	605,672	535,683	13.1
By brand	2004	2003	% chg
Safeway Stores	72,828	64,124	13.6
Vons Stores	18,605	11,742	58.5
Randalls Food Stores	12,055	10,622	13.5

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$35,823	\$35,727	0.3
Earnings	.560	-170	NA
U.S.	2004	2003	% chg
Sales	31,463	31,679	-0.7
Income bef. income taxes	.550	NA	NA

Headquarters

Safeway/5918 Stoneridge Mall Rd., Pleasanton, Calif. 94588-3229/Phone: (925) 467-3000.

Personnel, brands, agencies

Corporate: Steven A. Burd, chmn, pres & CEO; Brian Cornell, exec VP & chief mktg officer; Michael Minasi, sr VP-mktg; Barbara Walker, VP-adv & mktg.

Dailey & Associates, Los Angeles. Megan Birthistle, exec VP & mgmt super. — Safeway, Vons, Dominick's, Carrs, Randalls, Tom Thumb, Pavilions, Genuardi's.

Berlin Cameron/Red Cell, New York. William Growgin, pres. — creative projects.

Castells & Asociados Advertising, Los Angeles. Stan Levinson, acct dir. — Hispanic adv.

54 Sanofi-Aventis

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$114,638	\$91,506	25.3
Sunday magazine	11,207	3,913	186.4
B2B magazine	.772	1,081	-28.6
Local magazine	.NA	139	NA
Spanish-language magazine	.366	759	-51.8
Newspaper	3,017	256	NA
National newspaper	.719	734	-2.0
Spanish-language newspaper	.1	1	0.0
Network TV	78,266	65,127	20.2
Spot TV	5,385	4,725	14.0
Syndicated TV	10,062	10,464	-3.8
Cable TV network	26,363	30,261	-12.9
Network radio	7,654	1,278	498.9
National spot radio	.722	686	5.2
Outdoor	.187	233	-19.7
Internet	10,352	5,923	74.8
Measured media	269,711	217,086	24.2
Unmeasured media	404,565	358,428	12.9
Total	674,276	575,514	17.2
By brand	2004	2003	% chg
Allegra	137,465	121,498	13.1
Ambien	60,980	33,799	80.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$31,746	\$26,376	20.4
North America	2004	2003	% chg
Sales	10,956	NA	NA
Division sales	2004	2003	% chg
Prescription drugs	29,714	NA	NA
Human vaccines	2,032	NA	NA

Headquarters

Sanofi-Aventis/174 Avenue de France, Paris, France 75013/Phone: 33-1-53-77-44-00.

Sanofi-Aventis/300 Somerset Corporate Blvd., Bridgewater, N.J. 08807-2854/Phone: (908) 231-4000.

Notes

Paris-based Sanofi-Synthelabo won out in the competition to acquire Aventis, the French-German pharmaceutical company in late April 2004 when Aventis accepted a sweetened \$65 billion offer (up from \$59 billion) shortly after Swiss drug maker Novartis expressed interest to negotiate its own merger with Aventis.

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100 LEADING NATIONAL ADVERTISERS SUPPLEMENT

Personnel, brands, agencies

Corporate: Jean Francios Deheq, chmn & CEO; Richard J. Markham, vice chmn & chief operating officer. Timothy Rothwell, pres & CEO-N. Amer. ops; Charles F. Rouse, VP-U. S. comms & corp relations.

Deutsch, New York. Val DiFebo, mg ptrn & gm. — Depatcel, Mentra.

Euro RSCG Life LM&P, New York. Carmine Laliberte, pres; Amy Marchitello, VP & mgmt super. — Nasacort AQ.

Euro RSCG Life MetaMax, New York. Doug Burcin, pres; Tony Pisciotta, dir-client svcs; Nina Goodheart, mg dir. — Apidra, Arava, Lantus, Opticlik, Lovenox.

Euro RSCG Worldwide, New York. Larry Pollare, grp acct dir. — cons awareness adv, Lantus.

McCann Erickson Worldwide, New York. Andrew Schirmer, exec VP-McCann HumanCare. — Allegra (cons).

Medicus Group International, New York. Diane Pencek, sr VP & grp acct dir; Steve Trask, VP & grp acct dir; Scott Shevrin, sr VP & grp acct dir. — Multaq, Uroxatral.

Publicis Dialog, New York. Chip Weinstein, sr VP & grp acct dir. — Ambien, Allegra, Nasocort, Acomplia.

In-house. — media svcs, professional.

Optimedia International, New York. Vicki Mendelson, exec VP & mg dir. — media svcs.

Dermik Laboratories: 1050 West Lakes Dr., Berwyn, Pa. 19312/Phone: (484) 595-2700. Pierre Legault, pres-Sanofi-Aventis ww Dermatology/Dermik Laboratories; Joe Balzer, VP-sls & mktg.

Saatchi & Saatchi Healthcare, Langhorne, Pa. Bruce Medd, exec VP-mg dir. — Carac, Dermatop.

71 Sara Lee Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$30,794	\$45,158	-31.8
Sunday magazine	1,188	1,353	-12.2
B2B magazine	1,621	1,965	-17.5
Local magazine	NA	19	NA
Spanish-language magazine	.83	NA	NA
Newspaper	2,995	703	326.0
National newspaper	125	NA	NA
Spanish-language newspaper	.6	NA	NA
FSI	10,558	10,305	2.5
Network TV	66,693	56,929	17.2
Spot TV	10,057	4,735	112.4
Syndicated TV	20,798	31,198	-33.3
Cable TV network	50,606	47,027	7.6
Spanish-language TV	3,773	6,448	-41.5
Network radio	354	NA	NA
National spot radio	1,493	869	71.8
Outdoor	3,641	398	814.8
Internet	1,476	704	109.7
Measured media	206,261	207,811	-0.7
Unmeasured media	322,664	373,089	-13.5
Total	528,925	580,900	-8.9

By brand	2004	2003	% chg
Sara Lee	39,128	35,576	10.0
Hanes	31,068	50,378	-38.3
Hillshire Farm	29,513	16,445	79.5
Jimmy Dean	26,835	25,437	5.5
Senseo Coffee	21,624	0	NA
Ball Park Franks	19,614	11,887	65.0

Sales & earnings

(\$ in millions for fiscal year ended July 3, 2004)

Worldwide	2004	2003	% chg
Sales	\$19,556	\$18,291	6.9
Earnings	1,272	1,221	4.2
U.S.	2004	2003	% chg
Sales	\$10,934	\$10,662	2.6
Division sales	2004	2003	% chg
Sara Lee Meats	\$4,171	\$3,746	11.3
Sara Lee Bakery	3,415	3,276	4.2
Beverage	3,157	2,756	14.6
Household products	2,381	2,118	12.4
Branded apparel	6,449	6,399	0.8

Headquarters

Sara Lee Corp./3 First National Plaza, Chicago, Ill. 60602-4260/Phone: (312) 726-2600.

Notes

Sara Lee in February 2005 said it planned to sell its apparel and coffee businesses which would include Champion, Playtex and Just My Size apparel brands and Chuck Full O' Nuts, Hills Bros., MJB and Chase & Sandborn coffee brands. It also named Brenda Barnes to the CEO post replacing C. Steven McMillians, who remains as chairman until October 2005. Ms. Barnes had been president and chief operating officer.

Personnel, brands, agencies

Corporate: C. Steven McMillan, chmn; Brenda Barnes, pres & CEO; Robert Fellows, VP-brand devel.

Starcom USA, Chicago. Kif Ward, sr VP & media dir. — media svcs, TV & print.

Sara Lee Branded Apparel: 1000 E. Hanes Mill Rd., Winston-Salem, N.C. 27105/Phone: (336) 519-8080. Lee Chaden, exec VP-Sara Lee Corp & CEO-Sara Lee Branded Apparel; Rich Noll, sr VP-Sara Lee Corp, pres & chief operating officer-Sara Lee Branded Apparel; Sidney Falken, Hanes brand Champion; Tolly Love, VP-mktg Bali, Barely There & Wonderbra; Vicki Seawright, VP-mktg Playtex; Shelley Rider, VP-mktg casualwear & Just My Size; Mike Flatow, CEO-intimates & hosiery; Nadine Hall, VP-mktg Leggs & Hanes hosiery; Gerald Evans, CEO-Sara Lee casualwear; Ed Kivett, VP-mktg Sara Lee socks; Steve Lineberger, pres-Sara Lee underwear; Lisa Purcell, VP-mktg Sara Lee underwear; Mike Reed, dir-mktg Hanes Beefy-T; Heather Stefani, VP-mktg Champion; Larry French, VP-mktg Champion.

Agencies assigned on a project basis. — Hanes, Leggs hosiery.

Henderson Bromstead Art Co., Winston-Salem, N.C. Hayes Henderson, pres; Brad Bromstead, dir-mktg & client svcs. — Hanes Beefy-T.

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KraftWorks, New York. Neal Kraft, pres. — Bali, Barely There, Just My Size, Playtex apparel, Wonderbra.

Martin Agency, Richmond, Va. Bruce Kelley, vice chmn; Sydney Norton, VP, mgmt super. — Hanes.

Starcom USA, Chicago. Kif Ward, sr VP, media dir. — media svcs, Bali, Barely There, Playtex.

Lapiz, Chicago. Jose Bascaran, acct dir. — Hispanic adv, Hanes, Hanes Her Way.

Sara Lee Coffee & Tea North America: 500 Mamaronek Ave., Harrison, N.Y. 10528/Phone: (212) 532-0300. Aldo Uva, pres; Philippe Schaillee, VP-mktg.

BBDO Worldwide, Chicago. Stacie Boney, exec VP & client svc dir. — Chock Full o' Nuts, Hills Bros, MJB.

Starcom USA, Chicago. Kif Ward, sr VP & media dir. — media svcs, Chase & Sanborn, Chock Full o' Nuts, Hills Bros.

Sara Lee Food & Beverage: 3500 Lacey Rd., Downers Grove, Ill. 6015/Phone: (847) 595-6000. CJ Fraleigh, CEO-Sara Lee Food & Beverage N. Amer.; Jim Nolan, CEO-Sara Lee Foodservice; Paul Stoffregen, VP-mktg meals & Hillshire Farm; Steve Clapp, VP-mktg hot dogs & Ball Park; Jim Ruehlmann, VP-mktg breakfast & Jimmy Dean; Peter Reiner, VP-Sara Lee brands; Philippe Schaillee, VP-mktg Senseo.

BBDO Worldwide, Chicago. Stacey Boney, exec VP & client svc dir. — Senseo.

Element 79 Partners, Chicago. Kim Noles, mg dir. — Hillshire Farm.

Publicis USA, Dallas. Laurie Cluck, VP & mgmt super. — Colonial, Earthgrains, Grants Farm, Iron Kids, Rainbo, Sara Lee.

TBWA Worldwide, Los Angeles. Rob Schwartz, exec creative dir; Corey Mitchell, grp acct dir. — Ball Park, Jimmy Dean.

Starcom USA, Chicago. Kif Ward, sr VP & media dir. — media svcs.

Sara Lee Household & Body Care USA: 707 Eagleview Blvd., Exton, Pa. 19341/Phone: (610) 321-1220. Andrea Niessner, pres; Bob Clark, dir-mktg shoe care; Stan Stoltzfus, dir-mktg svcs.

Richards Group, Dallas. Rob Van Gorden, principal. — shoe care.

Starcom USA, Chicago. Kif Ward, sr VP & media dir. — media svcs, Ambi-Pur, Kiwi.

5 SBC Communications

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$34,956	\$48,313	-27.6
Sunday magazine	6,256	71	NA
B2B magazine	9,305	1,429	551.2
Local magazine	NA	39	NA
Spanish-language magazine	121	83	45.8
Newspaper	731,180	790,828	-7.5
National newspaper	73,632	75,597	-2.6
Spanish-language newspaper	9,197	6,178	48.9
Network TV	396,193	221,413	78.9
Spot TV	213,714	266,040	-19.7
Syndicated TV	29,141	35,076	-16.9

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Cable TV network	103,435	78,443	31.9
Spanish-language TV	37,147	11,390	226.1
Network radio	3,187	1,709	86.5
National spot radio	102,668	182,705	-43.8
Outdoor	20,535	21,115	-2.7
Internet	56,326	44,796	25.7
Yellow Pages	8,931	6,991	27.7
Measured media	1,835,924	1,792,216	2.4
Unmeasured media	850,831	807,134	5.4
Total	2,686,755	2,599,350	3.4
By brand	2004	2003	% chg
Cingular	833,704	619,230	34.6
AT&T Wireless	591,231	771,767	-23.4
SBC	382,542	357,239	7.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$40,787	\$40,498	0.7
Earnings	5,887	8,505	-30.8
Division sales	2004	2003	% chg
Voice	20,796	21,986	-5.4
Data	10,984	10,150	8.2
Long-distance voice	3,297	2,561	28.7
Other	1,810	1,843	-1.8

Headquarters

SBC Communications/175 E. Houston St., San Antonio, Texas 78205/Phone: (210) 821-4105.

Notes

SBC is in the process of purchasing AT&T Corp. for \$16 billion. The deal is expected to close in early 2006 and must gain approval by U.S. and European regulatory authorities. Cingular Wireless and AT&T Wireless merged in October 2004. Cingular is phasing out the 118-year-old AT&T name in the \$41 billion wireless merger. Cingular is 60% owned by SBC Communications and 40% by BellSouth Corp. In November 2004, SBC and BellSouth, who co-own Cingular Wireless, agreed to buy YellowPages.com, the online directory company.

Personnel, brands, agencies

Corporate: Edward E. Whitacre, Jr., chmn & CEO; Wendy Clark, VP-adv; Scott Helbing, sr VP-cons mktg; Mark Keiffer, sr VP-bus mktg; Karen Jennings, sr exec VP-HR & corp comms.

GSD&M, Austin, Texas. Jonathan Silverstein, VP & acct dir. — SBC telecommunications, Southwestern Bell telecommunications, Ameritech telecommunications.

TracyLocke, Dallas. Ed Winter, CEO; John Bell, dir-client svcs.

Dieste, Harmel & Partners, Dallas. David Ravelo, exec dir. — Hispanic adv.

Javelin Direct, Dallas. Greg Banks, mg dir. — direct mktg.

Marketing Arm, Dallas. Chris Smith, chief strategy officer. — sports mktg.

PanCom, Los Angeles. Ferdie Gonzalez, acct dir. — Asian-American adv.

Rodgers Townsend, St. Louis. Gary Shipper, acct dir. — business to business adv.

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Cingular Wireless: 5565 Glenridge Connector, Atlanta, Ga. 30342/Phone: (404) 236-6000. Randall L. Stephenson, chmn; Stan Sigman, pres & CEO; Marc Lefar, chief mktg officer; Darryl W. Evans, VP-adv; Vance Overbey, exec dir-adv; Stephanie Solberg, dir-adv; Chad Harris, natl dir-adv; Charlie Payne, dir-media.

BBDO Worldwide, Atlanta & New York. Rob Cherof, dir-mgmt. — Cingular wireless phone service.

OMD Worldwide, Atlanta. Dale Travis, acct dir. — media buying.

Mendoza Dillon & Asociados, Irvine, Calif. — Hispanic adv.

Ant Farm Interactive, Atlanta. Caroline Taylor, acct dir. — interactive mktg.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Margaret Lewis, mg ptrn & acct dir. — media svcs.

39 Schering-Plough Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$51,597	\$49,618	4.0
Sunday magazine	1,581	NA	NA
B2B magazine	238	530	-55.1
Spanish-language magazine	20	NA	NA
Newspaper	1,374	1,892	-27.4
National newspaper	1,170	2,212	-47.1
FSI	2,379	4,065	-41.5
Network TV	228,197	178,219	28.0
Spot TV	15,080	8,988	67.8
Syndicated TV	14,653	17,520	-16.4
Cable TV network	62,150	44,227	40.5
Spanish-language TV	2,403	NA	NA
Network radio	6,680	4,167	60.3
National spot radio	361	4,077	-91.1
Outdoor	35	176	-80.1
Internet	6,714	4,404	52.5
Measured media	394,632	320,095	23.3
Unmeasured media	458,089	395,029	16.0
Total	852,721	715,124	19.2
By brand	2004	2003	% chg
Levitra	148,474	46,963	216.2
Claritan	108,219	89,698	20.6
Clarinet	40,741	106,236	-61.7
Dr Scholl's	36,622	35,781	2.4
Coppertone	16,807	9,584	75.4
Nasonex	10,100	133	7482.8

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$8,272	\$8,334	-0.7
Earnings	-947	-92	NA
North America	2004	2003	% chg
Sales	3,219	3,559	-9.6
Division sales	2004	2003	% chg
Prescription Pharmaceuticals	6,417	6,611	-2.9
Consumer Health Care	1,085	1,026	5.8
Animal Health	770	697	10.5

Headquarters

Schering-Plough Corp./2000 Galloping Hill Rd., Kenilworth, N.J. 07033/Phone: (908) 298-4000.

Notes

Schering-Plough is now marketing in the U.S. Bayer's primary care pharmaceutical products Levitra, Avelox, Cipro, and Adalat, a cardiovascular drug, as well as several other lesser-known drugs. In the case of Bayer's drug for impotence, Levitra, S-P took over U.S. marketing duties from previous promotional partners Bayer healthcare and GlaxoSmithKline. S-P pays Bayer royalties on all Bayer drugs except Levitra based on their net sales. For Levitra, S-P and Bayer share profits on U.S. sales in exchange for S-P's marketing the drug. The S-P and Bayer agreements have only to do with marketing Bayer products in the U.S. and Puerto Rico.

Personnel, brands, agencies

Corporate: Fred Hassan, chmn & CEO; Carrie Cox, exec VP & pres-global pharmaceuticals; Herb Ehrenthal, VP-adv & mktg.

Schering-Plough Healthcare Products Division: 3 Connell Dr., Berkeley Heights, N.J. 07922/Phone: (908) 679-1640. Stanley Barshay, chmn-Consumer Health Care; James Mackey, sr VP-sales & mktg; Stephen Neumann, VP-mktg svcs; Chris Meringolo, dir-media svcs & pr.

Abelson-Taylor, Chicago. Cindy Stone, VP & acct dir; Cara Cocroft, acct super. — Avelox, Cipro IV.

BBDO Worldwide, New York. Anne Devereux, exec VP & chief integration officer. — Levitra, Nasonex.

CommonHealth, Parsippany, N.J. Matt Giegerich, pres & CEO; Guy Dess, pres-Adient (a CommonHealth co.). — animal health.

Euro RSCG Worldwide, New York. Marty Susz, ptrn & grp acct dir. — A&D Ointment, Afrin, Claritin, Coppertone, Coricidin, Dr. Scholl's, Lotrimin, Tinactin.

Ogilvy & Mather Worldwide, New York. Michael Guarini, exec grp dir. — Claritin.

Saatchi & Saatchi, New York. Mike Trepicchio, pres. — Clarinet.

MPG, New York. Steve Lanzano, exec VP & mg dir. — media svcs, Afrin, A&D, Claritin, Coopertone, Coricidin, Dr. Scholl's, Lotrimin, Tinactin.

Zenith Media, New York. Cathy Feiner, sr VP & acct mgr-natl bdcst; Marcie Kazdin, sr VP-comms plng. — Afrin, Claritin, Coppertone, Coricidin, Dr. Scholl's, Lotrimin, Tinactin—media buying. Clarinet, Nasonex — media svcs.

Reynardus & Moya Advertising, New York. Jorge Reynardus, ptrn. — Hispanic adv, Claritin.

12 Sears Holdings Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$81,489	\$55,159	47.7
Sunday magazine	15,967	47,202	-66.2
B2B magazine	805	787	2.3
Local magazine	50	48	4.2
Spanish-language magazine	1,209	2,091	-42.2
Newspaper	201,850	226,456	-10.9

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By media	2004	2003	% chg
National newspaper	157	750	-79.1
Spanish-language newspaper	3,957	4,557	-13.2
FSI	10,472	5,990	74.8
Network TV	312,092	257,134	21.4
Spot TV	43,399	55,883	-22.3
Syndicated TV	49,068	38,556	27.3
Cable TV network	109,744	114,437	-4.1
Spanish-language TV	97,427	123,012	-20.8
Network radio	7,832	19,771	-60.4
National spot radio	7,069	12,451	-43.2
Outdoor	2,028	817	148.2
Internet	13,817	25,294	-45.4
Yellow Pages	15,260	14,964	2.0
Measured media	973,692	1,005,359	-3.1
Unmeasured media	849,306	1,041,154	-18.4
Total	1,822,998	2,046,513	-10.9
By brand	2004	2003	% chg
Sears	560,884	648,515	-13.5
Kmart	236,060	187,842	25.7
Kenmore Appliances	50,398	56,833	-11.3
Craftsman	44,519	35,766	24.5
Lands End	32,691	27,933	17.0
Great Indoors Store	11,196	13,026	-14.1
Orchard Supply Hardware	10,495	12,312	-14.8

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$55,800	\$64,377	-13.3
Earnings	599	2,769	-78.4
U.S.	2004	2003	% chg
Sales	50,931	59,896	-15.0
Operating Income	2,189	1,493	46.6
Division sales	2004	2003	% chg
U.S. merch sls & svcs	50,931	55,467	-8.2
Sears Canada	4,869	4,481	8.7
U.S. credit & fin prods	381	4,752	-92.0

Headquarters

Sears Holdings Corp./3333 Beverly Rd., Hoffman Estates, Ill. 60179/Phone: (847) 286-2500.

Notes

Sears Holdings Corp. became the new name this year for the merged units of Sears, Roebuck & Co. and Kmart Corp. after the two combined in March 2005. Financial returns are shown pro forma in this report as if the two retailers had been merged for two successive fiscal years. Logistically, Sears Holdings is headquartered in Hoffman Estates, a Chicago suburb and former headquarters of Sears, Roebuck & Co., while a sizable presence continues in Troy, Mich., where Kmart was based. Edward S. Lampert, 41, owner of 52.6% of Kmart and 14.6% of Sears stock through ESL, an investment company he founded, is the new chairman. The office of chairman also includes Alan J. Lacy, vice chairman and CEO of Sears Holdings and former chairman and CEO of Sears, and Alwyn Lewis, president of Sears Holdings and CEO of Kmart and Sears Retail. Mr. Lewis had been president and CEO of Kmart.

Personnel, brands, agencies

Corporate: Edward S. Lampert, chmn; Alan J. Lacy, vice chmn & CEO; Aylwin B. Lewis, pres-Sears Holdings Corp. & CEO-Kmart & Sears retail.

Kmart Corp.: 777 Third Ave., New York, N.Y. 10017/Phone: (212) 546-1425. Paul Guyardo, sr VP & chief mktg officer; Jon Gieselman, VP-adv & pr.

Grey Worldwide, New York. Hal Fass, exec VP & mg ptrn.

MediaCom, New York. Debra Harris, sr VP & grp dir. — media svcs.

G2 Worldwide, New York. Joe Celia, CEO; Jason Press, pres-G2 New York. — brand devel & design.

Meridian, Troy, Mich. Dan Morrissey, pres; Diane Giorlando, acct dir; Larry Haddock, dir-client svcs. — weekly adv circular, newspaper.

Newspaper Services of America, Chicago. Bob Shamberg, chmn & CEO. — newspaper buying.

WING Latino, New York. Jackie Bird, pres & CEO; Tony Dagnery, VP-bus devel. — Hispanic adv.

Lands' End: 5 Lands' End Ln., Dodgeville, Wis. 53595/Phone: (608) 935-9341. Mindy Meads, pres & CEO-Lands' End & exec VP-Sears Holdings Corp.

Agency in review.

Sears, Roebuck & Co.: 3333 Beverly Rd., Hoffman Estates, Ill. 60179/Phone: (847) 286-2500. Rebecca J. Case, VP-creative.

Ogilvy & Mather Worldwide, Chicago. Linda Garrison, mg dir. — Craftsman, Die Hard, Kenmore, Orchard supply hardware, Sears Auto centers.

Y&R, Chicago. Kary McIlwain, pres & CEO-Y&R Chicago. — Sears brands, Great Indoors.

MindShare Worldwide, New York & Chicago. David Handelaman, sr ptrn & strategic plng dir. — media svcs.

Bravo Group, New York. Linda DeJesus-Cutler, pres. — media svcs, Hispanic print & bcast, creative devel.

ABD, Chicago. Dan Morrissey, pres; Gary Moss, VP-acct svcs. — weekly adv circular, newspaper.

Burrell Communications Group, Chicago. Fay Ferguson, co-CEO; L.T. Cushon Dillard, VP & acct dir. — African-American adv, targeted media buying.

Circulation Experti, New York. Garrison Jackson, pres & CEO. — African-American newspaper plng & buying.

Kang & Lee, New York. Cynthia Park, exec VP. — Asian-American adv.

Newspaper Services of America, Chicago. Bob Shamberg, chmn & CEO. — newspaper buying.

TMP Worldwide, Chicago. Stuart McKelvey, CEO. — directory adv buying.

15 Sony Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$92,606	\$83,399	11.0
Sunday magazine	706	6,473	-89.1
B2B magazine	47,993	41,303	16.2
Local magazine	70	127	-44.9

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By media	2004	2003	% chg
Spanish-language magazine	421	504	-16.5
Newspaper	132,503	127,446	4.0
National newspaper	42,185	40,558	4.0
Spanish-language newspaper	918	919	-0.1
FSI	83	1,484	-94.4
Network TV	278,604	337,823	-17.5
Spot TV	63,144	79,287	-20.4
Syndicated TV	38,582	41,910	-7.9
Cable TV network	156,342	156,936	-0.4
Spanish-language TV	8,371	10,176	-17.7
Network radio	5,792	1,655	250.0
National spot radio	12,738	14,101	-9.7
Outdoor	12,104	11,172	8.3
Internet	39,484	45,437	-13.1
Measured media	932,646	1,000,710	-6.8
Unmeasured media	732,642	805,916	-9.1
Total	1,665,288	1,806,626	-7.8
By brand	2004	2003	% chg
Sony movies	465,809	598,642	-22.2
Sony Electronics	178,248	131,158	35.9
Sony Videos	103,737	62,348	66.4
Sony Playstation Games	101,290	110,230	-8.1
Sony Pictures Classics	21,924	12,365	77.3
989 Sports Video Games	13,453	25,257	-46.7
Sony Internet Content	10,710	18,258	-41.3

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$69,767	\$64,021	9.0
Earnings	824	990	-16.8
U.S.	2004	2003	% chg
Sales	19,741	17,937	10.1
Operating income	920	1,588	-42.1
Division sales	2004	2003	% chg
Electronics	45,575	42,125	8.2

Headquarters

Sony Corp./6-7-35 Kitashinagawa, Shinagawa-ku, Tokyo, Japan
141-0001/Phone: 81-3-5448-2111.

Sony Corp. of America, 550 Madison Ave., New York, N.Y.
10022/Phone: (212) 833-6800.

Personnel, brands, agencies

Corporate: Howard Stringer, chmn & CEO Sony Corp., Sony Corp. of America.

Sony BMG Music Entertainment: 550 Madison Ave., New York, N.Y. 10022/Phone: (212) 833-8000. Andrew Lack, chmn & CEO; Lee Stimmel, VP-mktg, Epic Records; Marc Offenbach, sr VP-sales & mktg, Sony Classical; Jeff Jones, pres-Sony BMG Catalog; Adam Owett, sr VP-creative svcs.

Gotham, New York. Yvonne Ericson, VP-media. — Epic Records Group, Sony Classical.

Universal McCann Worldwide, New York. Rich Anderson, sr VP & mg dir. — media svcs.

Sony Computer Entertainment America: 919 E. Hillsdale Blvd., 2nd Fl., Foster City, Calif. 94404/Phone: (650) 655-8000. Kazuo Hirai, pres; Andrew House, exec VP; Mike Fasulo, chief mktg officer; Ami Blaire, dir-prod mktg.

TBWA Worldwide, Los Angeles. Grace Kao, acct dir. — PlayStation, 989 Studios.

OMD Worldwide, Los Angeles & New York. Mike Rose, acct dir-L.A.; Meg Woods, acct dir-N.Y. — media svcs.

Sony Electronics: 1 Sony Dr., Park Ridge, N.J. 07656/Phone: (201) 930-1000. Hideki Komiyama, pres & chief operating officer; Mike Fasulo, chief mktg officer.

Agencies assigned on a project basis. — Sony Electronics.

Universal McCann Worldwide, New York. Rich Anderson, sr VP & mg dir. — media svcs.

Sony Ericsson Mobile Communications: 7001 Development Dr., P.O. Box 13969, Research Triangle Park, N.C. 27709/Phone: (919) 472-7000. Frances Britchford, VP-mktg comms.

Bartle Bogle Hegarty, New York. Clay Mills, acct dir. — Sony Ericsson mobile telephones.

Media Edge, New York. Rachel Israel, acct head. — media buying.

Sony Pictures Entertainment: 10202 W. Washington Blvd., Culver City, Calif. 90232/Phone: (310) 244-4000. David Bishop, pres-ww brand integration strategy; Michael Lynton, chmn & CEO; Geoffrey Ammer, pres-ww mktg; Stefanie Napoli, sr VP-natl media, Columbia Pictures.

McCann Erickson Worldwide, Los Angeles. Karen Bloore, exec VP & mg dir-McCann Entertainment grp. — Sony Pictures, Sony Pictures Classics.

28 Sprint Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$19,059	\$13,237	44.0
Sunday magazine	296	NA	NA
B2B magazine	6,506	7,680	-15.3
Spanish-language magazine	8	23	-65.2
Newspaper	392,195	400,980	-2.2
National newspaper	51,444	49,529	3.9
Spanish-language newspaper	1,242	93	NA
Network TV	243,767	233,675	4.3
Spot TV	78,017	38,711	101.5
Syndicated TV	966	926	4.3
Cable TV network	27,788	16,102	72.6
Network radio	2,883	NA	NA
National spot radio	15,591	10,476	48.8
Outdoor	4,685	2,984	57.0
Internet	12,923	7,544	71.3
Measured media	857,370	781,960	9.6
Unmeasured media	256,097	255,725	0.1
Total	1,113,467	1,037,685	7.3
By brand	2004	2003	% chg
Sprint	857,352	781,857	9.7

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Sales & earnings (\$ in millions)

Worldwide & U.S.	2004	2003	% chg
Sales	\$27,428	\$26,197	4.7
Earnings	-1,012	1,290	NA
Division sales	2004	2003	% chg
Wireless	14,647	12,690	15.4
Long Distance	7,327	8,005	-8.5
Local division	6,021	6,130	-1.8

Headquarters

Sprint Corp./6200 Sprint Pkwy., P.O. Box 7997, Overland Park, Kan. 66251/Phone: (913) 624-3000.

Notes

Sprint and Nextel are expected to complete their merger in August 2005.

Personnel, brands, agencies

Corporate: Gary Forsee, chmn, pres & CEO; Mike Goff, VP-corp brand mgmt; Michelle Emerson, dir-brand mgmt; Anita Newton, assoc VP.

Publicis BOS Group, New York. Don Blashford, sr VP-mg dir.

Starcom USA, San Francisco. Jane Groft, sr VP & media dir. — media svcs.

VML, Kansas City, Mo. John Cook, chief client officer. — inter-active mktg.

Sprint Business Solutions: 6200 Sprint Pkwy., Overland Park, Kan. 66251/Phone: (913) 624-3000. Dana Chase, assoc VP-segment mktg; Vicki Warker, VP-mktg; Anita Newton, assoc VP-customer experience & messaging.

Publicis & Hal Riney, San Francisco. Mike Goeft, sr VP & grp acct dir; James Gassel, sr VP & grp acct dir.

Starcom USA, San Francisco. Jane Groft, sr VP & media dir. — media svcs.

Fahey/Davidson, Washington. Brent Earles, VP-acct svcs. — col-lateral.

Organic, San Francisco. George Consagra, VP & mg dir-interac-tive mktg. — online media.

Sprint Consumer Solutions: 6200 Sprint Pkwy., Overland Park, Kan. 66251/Phone: (913) 624-3000. Tim Kelly, pres-cons solutions; Dave Dess, VP-brand devel & comms.

Footnote Cone & Belding Worldwide, Guayanabo (San Juan), Puerto Rico. Carmen Cedre, VP & gm. — Puerto Rico adv.

Publicis & Hal Riney, San Francisco, Calif. Mike Goeft, sr VP & grp acct dir; James Gassel, sr VP & grp acct dir. — Sprint PCS.

Starcom USA, San Francisco. Jane Groft, sr VP & media dir.

Euro RSCG 4D, Chicago. Joy Schwartz, VP & dir-client svcs — direct mktg.

Advertising Checking Bureau, New York. Charles Farah, acct mgr-co-op program admin. — co-op adv.

Callahan Creek, Lawrence, Kan. John Kuefler, exec VP-client svcs & direct mktg. — direct mktg.

Design Continuum, West Newton, Mass. Theresa Chiuech, sr strategist-retail comms; Tom Burchard, brand dir. — retail design.

Enpocket, Boston. Scott Pearson, VP-sls, direct & mobile mktg.

Fitch, Columbus, Ohio. David Hogrefe, dir-environments & retail comms; Mike Bills, mg dir. — retail comms.

Modem Media, San Francisco. Matrin Reidy, exec sponsor & pres. — direct mktg.

Organic, San Francisco. Quentin George, VP & mg dir. — inter-active mktg.

Two West, Kansas City, Mo. Ethan Whitehill, pres-retail comms. — retail comms.

Vidal Partnership, New York. Sandra Alfaro, VP-acct mgmt; Alberto Ferrer, VP & dir-digital & direct mktg. — Hispanic mktg.

Sprint Local Consumer Solutions: 6360 Sprint Pkwy., Overland Park, Kan. 66251/Phone: (913) 762-2094. Stephen Carter, VP-cons mktg.

Publicis & Hal Riney, San Francisco. James Gassel, sr VP & grp acct dir; Mike Goeft, sr VP & grp acct dir. — business.

Nicholson Kovac, Kansas City, Mo. Jennifer Bowlen, acct super-media plng & buying. — cons.

Starcom USA, San Francisco. Jane Groft, sr VP & media dir. — media svcs.

36 Target Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$63,459	\$69,300	-8.4
Sunday magazine	3,979	3,301	20.5
B2B magazine	1,009	1,064	-5.2
Local magazine	611	591	3.4
Spanish-language magazine	119	3	NA
Newspaper	140,201	136,606	2.6
National newspaper	7,823	6,402	22.2
Spanish-language newspaper	1,520	1,192	27.5
FSI	1,855	1,093	69.7
Network TV	151,148	111,891	35.1
Spot TV	70,115	75,406	-7.0
Syndicated TV	4,685	102	NA
Cable TV network	31,342	35,372	-11.4
Spanish-language TV	11,071	8,714	27.0
National spot radio	2,039	1,807	12.8
Outdoor	6,179	2,327	165.5
Internet	29,075	19,542	48.8
Measured media	526,230	474,713	10.9
Unmeasured media	377,863	402,361	-6.1
Total	904,093	877,074	3.1
By brand	2004	2003	% chg
Target stores	523,216	472,693	10.7

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$46,839	\$42,025	11.5
Earnings	1,885	1,619	16.4
U.S.	2004	2003	% chg
Sales	46,839	42,025	11.5

Headquarters

Target Corp./1000 Nicollet Mall, Minneapolis, Minn. 55403/Phone: (612) 304-6073.

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Notes

Target Corp. in June 2004 sold its Marshall Field's department store chain and several Mervyn's units to May Department Stores for \$3.24 billion. In November 2004, it struck a deal with an investment group including Sun Capital Partners and Cerberus Capital Management to sell the remaining 257 Mervyn stores in 13 states for \$1.65 billion.

Personnel, brands, agencies

Corporate: Robert Ulrich, chmn & CEO; Michael Francis, exec VP-mktg; Eric Erickson, creative dir.

In-house. — Target stores.

FAME, Minneapolis. Lynne Robertson, pres.

Peterson Milla Hooks, Minneapolis. Betsy Treinen, acct super.

Haworth Marketing & Media, Minneapolis. Gary Tobey, CEO. — media svcs.

R/GA, New York. John Antinori, exec producer. — interactive mktg & E-commerce devel.

3 Time Warner

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$308,983	\$276,479	11.8
Sunday magazine	15,883	9,653	64.5
B2B magazine	38,597	37,951	1.7
Local magazine	257	233	10.3
Spanish-language magazine	836	928	-9.9
Newspaper	282,464	296,745	-4.8
National newspaper	92,163	89,715	2.7
Spanish-language newspaper	1,779	1,947	-8.6
FSI	1,168	71	NA
Network TV	451,879	420,417	7.5
Spot TV	136,854	144,550	-5.3
Syndicated TV	61,422	42,663	44.0
Cable TV network	209,389	208,903	0.2
Spanish-language TV	28,625	28,099	1.9
Network radio	13,134	11,483	14.4
National spot radio	78,587	73,352	7.1
Outdoor	70,858	37,052	91.2
Internet	145,304	152,404	-4.7
Measured media	1,938,182	1,832,645	5.8
Unmeasured media	1,344,893	1,240,119	8.4
Total	3,283,075	3,072,764	6.8
By brand	2004	2003	% chg
Warner Bros. movies	559,967	548,534	2.1
AOL	271,950	261,262	4.1
New Line movies	222,055	250,922	-11.5
Time Warner videos	209,759	168,891	24.2
Time Warner	89,500	75,841	18.0
HBO	79,016	83,609	-5.5
WB TV Network	58,686	56,337	4.2
Netscape	42,257	6,656	534.8
Sports Illustrated	37,335	42,444	-12.0
TNT Cable TV	36,185	44,384	-18.5
CNN	35,832	33,451	7.1
TBS Cable TV	32,000	45,491	-29.7
Road Runner Internet Svcs.	21,494	14,836	44.9

By brand	2004	2003	% chg
Time Warner TV Promos	18,856	2,839	564.2
Warner Bros Videos	18,298	18,719	-2.2
Cartoon Network	15,630	9,407	66.1
People Magazine	14,546	11,149	30.5
Warner Independent Movies	13,570	0	NA
TCM Cable TV	11,656	8,451	37.9
In Style Magazine	10,649	8,742	21.8
Warner Books	10,561	9,877	6.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$42,089	\$39,565	6.4
Earnings	3,364	2,639	27.5
U.S.	2004	2003	% chg
Sales	33,572	32,123	4.5

Division sales	2004	2003	% chg
Filmed Entertainment	11,853	10,967	8.1
Networks	9,054	8,434	7.4
AOL	8,692	8,600	1.1
Cable Systems	8,484	7,699	10.2
Publishing	5,565	5,533	0.6

Headquarters

Time Warner/1 Time Warner Center, New York, N.Y. 10019/Phone: (212) 484-8000.

Notes

Time Warner in March 2005 said it would pay \$300 million to settle a complaint by the Securities and Exchange Commission that TW's AOL unit overstated revenue for nine quarters, although TW neither admitted nor denied the complaint allegations. As part of the agreement, TW must hire an independent examiner to determine if its historical accounting for a number of transactions was in accordance with GAAP.

Personnel, brands, agencies

Corporate: Richard D. Parsons, chmn & CEO; Jeffrey Bewkes, chmn-Entertainment & Networks Grp; Don Logan, chmn-Media & Comms Grp.

America Online: 22000 AOL Way, Dulles, Va. 20166/Phone: (703) 265-1000. Jonathan Miller, chmn & CEO; Ted Leonsis, vice chmn & pres-AOL audience bus; Neil Smit, pres-AOL access bus; Joe Redling, chief mktg officer.

BBDO Worldwide, New York. Ted Gilvar, sr acct dir; Jennifer Kuratek, acct dir. — AOL, broadband, entertainment svcs.,

Initiative Media Worldwide, New York. Larry Orell, exec VP & gm. — media svcs, AOL, Compuserve, Digital City, ICQ, Mapquest, Moviefone, Netscape.

Casanova Pendrill Publicidad, Costa Mesa, Calif. Allen Payano, acct dir. — Hispanic adv, AOL, AOL Latino.

Digitas, New York. — online adv & media strategy.

Market Vision, San Antonio. Bonnie Garcia, founder. — promotions, AOL Latino.

Home Box Office: 1100 Ave. of the Americas, New York, N.Y. 10036/Phone: (212) 512-1000. Chris Albrecht, chmn & CEO; Bill

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Nelson, chief operating officer; Eric Kessler, sls & mktg; Courteney Monroe, sr VP-adv.

BBDO Worldwide, New York. Andy Russem, acct dir.

OMD Worldwide, New York. — media plng, HBO.

New Line Cinema: 116 N. Robertson Blvd., Ste. 200, Los Angeles, Calif. 90048/Phone: (310) 854-5811. Robert K. Shaye, co-chmn & co-CEO; Michael Lynne, co-chmn & co-CEO; Rolf Mittweg, pres & chief operating officer-ww mktg & distribution; Russell Schwartz, pres-domestic mktg; David Tuckerman, pres-domestic theatrical distribution; Diane Charbanic, exec VP-media & co-op adv.

Carat Americas, New York & Los Angeles, N.Y. Annie Chen, VP & grp dir-natl bdcst; Andy Donchin, exec VP & dir-natl bdcst; Stacy Karabuykov, super-natl bdcst; Susan Victor, VP & acct dir; Jenny Wakumoto, acct super; Carol Lanssen, sr VP & grp acct dir. — media svcs, New Line Cinema, New Line Home Video, Fine Line Features.

Southern Progress Corp. (a div of Time Inc.): 2100 Lakeshore Dr., Birmingham, Ala. 35209/Phone: (205) 445-6000. Tom Angelillo, pres & CEO; Scott Sheppard, exec VP-grp pub; Coastal Living: Burton Craig, pub; Shelton Thompson, dir-promo; Cooking Light: Chris Allen, pub; Kate Darden, dir-mktg; Cottage Living: Stephen Bohlinger, pub; Susan Sutton, dir-mktg; Health: Jennifer Deans, pub; Eileen Kiernan, assoc dir-mktg; Progressive Farmer: Bruce Thomas, pub; Allen Vaughan, gm; Southern Accents: Bill Carey, pub; Kristen Guinn, dir-mktg; Southern Living: Rich Smyth, pub; Theresa Lux, dir-mktg; Sunset: Tom Marshall, pub; Beth Whiteley, dir-mktg.

In-house. — Coastal Living, Cooking Light, Cottage Living, Health, Progressive Farmer, Southern Accents, Southern Living, Sunset.

Time Inc.: Time & Life Building, Rockefeller Center, New York, N.Y. 10020/Phone: (212) 522-1212. Ann Moore, chmn & CEO; Norman Pearlstine, editor-in chief; Entertainment Weekly: Andy Sareyan, pres; Tom Morrissey, pub; Ray Chelstowski, ntl sls mgr; Peggy Mansfield, assoc pub-mktg; Sandy Drayton, VP-comms & TV devel; Holly Cavanna, dir-cons mktg; Nancy Ryan, gm; Fred O. Nelson, VP-editorial devel; Carol Mazzarella, dir-prod & tech; Essence: Michelle Ebanks, pres; Barbara Britton, VP & assoc pub-sl; Cindy Schreiber, assoc pub-mktg; In Style: Stephanie George, pres; Lynette Harrison, pub; Amy Keohane, VP-devel; John Stevenson, dir-cons mktg; Fortune Group: Christopher J. Poleway, pres; Fortune: Michael Federle, pub; Money: Michael V. Dukmejian, pub; Jim Richardson, assoc pub-mktg; Laurie Howlett, VP-mktg; Fortune Small Business: Hugh Wiley, pub; Business 2.0: Lisa Bentley, pub; Life: Andrew Blau, pres; Peter Bauer, pub; Pam Harris, assoc pub-mktg; Parenting Group: David Kieselstein, pres; Nancy Hallberg, grp VP-mktg; Parenting: Jeff Wellington, pub & grp VP; Baby Talk: Greg Schumann, pub; People Group: Nora P. McAniff, exec VP-Time Inc.; Steve Sachs, VP-cons mktg; People: Paul Caine, pub; Jennifer Ogden-Reese, dir-cons mktg; Susan Parkes, assoc pub-mktg; David Geithner, gm; Nancy Valentino, dir-corp comms; People en Espanol: Jacqueline Hernandez-Fallous, pub; Jose Raul Perez, dir-cons mktg; Lauren Price, dir-mktg; Real Simple: Robin Domeniconi, pres & pub; John Brown, VP-cons mktg, Real Simple, InStyle &

Parenting; Kevin White, assoc pub-sl; Sports Illustrated: John Squires, pres; David Morris, pub; Johnathan Shar, dir-cons mktg; Jeff Price, VP & chief mktg officer; Sports Illustrated for Kids: Dave Watt, pub; Lara Chait, brand mgr; Teen People: Cathy O'Brien, acting pub; Time: Ellen Naughton, pres; Ed McCarrick, ww pub; Taylor Gray, ww assoc pub & mktg dir; Matthew Turck, assoc pub; Nate Stamos, adv dir-N.Y.; Steve Cambron, dir-mktg; All You: Diane Oshin, pub; Suzanne Quint, brand dir; Gary Foodim, dir-cons mktg.

Fallon Worldwide, New York. Lisa Clunie, acct dir. — cons awareness adv, cons branding, Time.

In-house. — Babytalk, Entertainment Weekly, In Style, Money, Parenting, People, People en Espanol, Teen People, Sports Illustrated For Kids.

Black Canyon Productions, New York. Steve Stern, ptrn. — direct mktg, direct response-TV adv, Sports Illustrated.

Larry Sons, New York. Larry Sons, pres. — direct mktg, direct response-TV adv, Sports Illustrated.

Mullen, Wenham, Mass. Bruce Gold, acct super. — Fortune, Fortune Small Business.

Respond 2, Portland, Wash. Tim O'Leary, CEO. — direct mktg, direct response-TV, Sports Illustrated.

Time Warner Book Group: 1271 Ave. of the Americas, New York, N.Y. 10020/Phone: (212) 522-7200. Laurence J. Kirshbaum, chmn & CEO; Maureen Mahon Egen, pres & chief operating officer; Christine Barba, VP & dir-sl & mktg.

In-house. Cheryl Rozier, dir-adv. — 5 Spot, Arcade, Aspect, Back Bay, Bulfinch Press, Little Brown & Co, Mysterious Press, Time Warner AudioBooks, Walk Worthy Press, Warner Business Books, Warner Books, Warner Faith, Warner Vision.

Time Warner Cable: 290 Harbor Dr., Stamford, Conn. 06902/Phone: (203) 328-0600. Glenn A. Britt, chmn & CEO; John Billock, chief operating officer; Larry Fischer, pres-Time Warner Cable media sl; Lynn Yaeger, exec VP-corp affairs; Brian Kelly, sr VP-mktg; Alan Blum, sr VP-ad sl; Brendan Gleeson, sr VP-ad sl.

Ogilvy & Mather Worldwide, New York. Ralph Sherman, sr ptrn & exec grp dir. — Time Warner cable.

RTC Relationship Marketing, Washington. Renee Lavecchia, VP & acct dir. — Road Runner Internet service.

Time4 Media: 2 Park Avenue, New York, N.Y. 10016/Phone: (212) 779-5000. Mark Ford, pres; Jim Else, sr VP-corp sl; Golf Magazine: Chris Wightman, pub; Robert Schupler, dir-mktg; Marine Grp: John Young, VP-sl, Yachting, MotorBoating, Salt Water Sportsman; William Hogue, dir-mktg; Mountain Sports Media: Jamie Pentz, grp pub-Ski & Skiing, Warren Miller Entertainment; Stef Luciano, VP-mktg; Popular Science: Gregg Hano, pub; This Old House Magazine: Dan Robertson, VP & dir-sl; Allison Zinczenko, dir-mktg; Time4Outdoors: Dave Bean, grp pub-Field & Stream, Outdoor Life; Kerry Bianchi, mktg; Transworld Media: Brad McDonald, grp pub; Todd Toth, assoc pub-Ride BMX, Transworld Motorcross & QUAD Off Road Magazine; Transworld SKATEboarding: Monica Campana, assoc pub; Transworld SNOWboarding: Maxx von Marbod, assoc pub; Transworld SURF: Liam Ferguson, assoc pub.

In-house. — BMX Business News, Field & Stream, GOLF Magazine, MotorBoating, Outdoor Life, Popular Science, QUAD

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Off Road Magazine, Ride BMX, Salt Water Sportsman, SKI, Skiing, Skiing Trade News, This Old House Magazine, TransWorld Business, TransWorld MOTOcross, TransWorld SKATEboarding, TransWorld SURF.

Turner Broadcasting System: 1 CNN Center, Atlanta, Ga. 30303/Phone: (404) 827-1700. Phil Kent, chmn & CEO.; Terence F. McGuirk, vice chmn-TBS & chmn & pres-Atlanta Braves; Jim Walton, pres-CNN News Group; Greg D'Alba, chief operating officer-CNN adv sls & mktg; Mark Lazarus, pres-Turner Entertainment Group; David Levy, pres-Turner Entertainment sls & mktg & pres-Turner Sports.

Agencies assigned on a project basis. — CNN, TBS, TNT, TCM, Turner South.

Agency in review. — Atlanta Braves.

Mullen, Wenham, Mass. Jim Hartrich, exec VP & grp dir. — GameTap.

In-house. Anne Marie Loeffler, VP-media svcs. — media svcs, Cartoon Network.

Warner Bros. Entertainment: 4000 Warner Blvd., Burbank, Calif. 91522/Phone: (818) 954-6000. Barry Meyer, chmn & CEO; Alan Horn, pres & chief operating officer; James Cardwell, pres-Warner Home Video; Paul Levitz, pres & pub-DC Comics; Dan Romanelli, pres-Warner Bros. Worldwide Consumer Products; Sander Schwartz, pres-Warner Bros. Animation; Dawn Taubin, pres-domestic mktg, Warner Bros. Pictures; Lynn Whitney, sr VP-ww media adv, Warner Bros. Pictures; Melanie Jones, sr VP-media plng, WB Television Network; Laura Kim, exec VP-mktg & publicity, Warner Independent Pictures; Lisa Gregorian, sr VP-Warner Bros. Television creative svcs.

Grey Entertainment, Los Angeles. Kris Coontz, pres. — Warner Bros studios, Warner home video.

WB Network (Tribune Co. holds a minority interest): 4000 Warner Blvd., Burbank, Calif. 91522/Phone: (818) 977-5000. Garth Ancier, chmn; David Janollari, pres-entertainment; Bill Morningstar, exec VP-media sls.

Grey Worldwide, Los Angeles. Kris Coontz, pres. — media svcs.

13 Toyota Motor Corp.

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$241,473	\$255,072	-5.3
Sunday magazine	3,435	3,938	-12.8
B2B magazine	2,412	2,367	1.9
Local magazine	216	289	-25.3
Spanish-language magazine	1,599	2,705	-40.9
Newspaper	33,778	35,309	-4.3
National newspaper	53,910	38,911	38.5
Spanish-language newspaper	153	26	488.5
FSI	1	NA	NA
Network TV	311,941	277,561	12.4
Spot TV	236,281	201,345	17.4
Syndicated TV	5,034	5,613	-10.3
Cable TV network	101,168	77,847	30.0
Spanish-language TV	32,595	45,516	-28.4

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Network radio	2,860	3,523	-18.8
National spot radio	8,657	4,648	86.3
Outdoor	18,132	13,566	33.7
Internet	43,863	47,712	-8.1
Measured media	1,097,508	1,015,948	8.0
Unmeasured media	723,460	622,678	16.2
Total	1,820,968	1,638,626	11.1
By brand	2004	2003	% chg
Toyota	792,673	752,835	5.3
Lexus	244,527	256,893	-4.8
Scion	59,848	6,220	862.2

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$160,959	\$132,791	21.2
Earnings	9,955	6,989	42.4
North America	2004	2003	% chg
Sales	55,007	50,796	8.3
Operating income N. Amer.	3,639	2,398	51.8
Division sales	2004	2003	% chg
Automotive	148,665	122,596	21.3
Other	8,341	6,812	22.4
Financial svcs	6,858	6,210	10.4

Headquarters

Toyota Motor Corp./1 Toyota-cho, Toyota City, Aichi Prefecture, Japan 471-71/Phone: 81-565-28-2121.

Toyota Motor Sales USA, 19001 S. Western Ave., Torrance, Calif. 90501/Phone: (310) 468-4000.

Personnel, brands, agencies

Corporate: Toyota Motor Corp.: Hiroshi Okuda, chmn; Fujio Cho, vice chmn; Katsuaki Watanabe, pres; Toyota Motor Sales USA: Yukitoshi Funo, chmn & CEO & head-Americas ops; James E. Press, pres & CEO; Donald V. Esmond, sr VP-automotive ops.

DCA Advertising, New York. Rand Pearsall, exec VP & grp mg dir. — corporate adv.

Conill, Torrance, Calif. Carlos Martinez, gm. — Hispanic adv.

Lexus Division: 19001 S. Western Ave., Torrance, Calif. 90501/Phone: (310) 468-4000. Bob Carter, grp VP & gm; Deborah Wahl-Meyer, VP-mktg; Nancy Fein, VP-svc, parts, customer satisfaction & training; Jim Colon, VP-sls & dealer devel; Ann Bybee, corp mgr-adv, brand & prod strategy; Keith Dahl, natl mgr-event mktg; Brian Bolain, natl mgr-adv & media; Robin Pisz, natl interactive mktg mgr; Lynda Eguchi, media & publications mgr.

Team One Advertising, El Segundo, Calif. Brian Sheehan, CEO; Paul Mareski, mgmt dir; Chris Graves, exec creative dir. — Lexus vehicles.

Zenith Media, New York. Rich Hamilton, CEO; Peggy Green, pres-bdcast. — media buying.

Burrell Communications Group, Chicago. Fay Ferguson, co-CEO; James Patterson, acct dir. — African-American adv.

Conill, Torrance, Calif. Carlos Martinez, gm. — Hispanic adv.

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Scion Division: 19001 S. Western Ave., Torrance, Calif. 90501/Phone: (310) 468-4000. Mark Templin, VP; Steve Haag, corp mgr; Dawn Ahmed, natl sls promo mgr; Deborah Senior, natl mktg comms mgr.

Attik, San Francisco. Rick Peralta, CEO. — Scion vehicles.

Zenith Media, New York. Bea Leung, VP-comms plng. — media svcs, interactive mktg.

Toyota Division: 19001 S. Western Ave., Torrance, Calif. 90501/Phone: (310) 468-4000. Jim Lentz, grp VP & gm; Jim Farley, VP-mktg; Dave Fleming, VP-sls; Ernest Bastien, VP-vehicle ops grp; Sandi Kayse, natl car adv & event mgr; Steve Jett, natl truck adv mgr; Keith St. Clair, natl adv mgr; Gregg Benkendorfer, natl interactive mktg mgr; Bernie Bradford, natl Toyota Dealers Assoc. adv mgr; Mark Simmons, natl mgr-adv strategy & media.

Saatchi & Saatchi, Torrance, Calif. Rich Anderman, pres & chief operating officer; Tim Murphy, grp ideas mgmt dir. — Toyota vehicles.

Zenith Media, New York. Rich Hamilton, CEO; Peggy Green, pres-bdcast. — media buying.

Burrell Communications Group, Chicago. Fay Ferguson, co-CEO; Ella Britton, VP & acct dir. — African-American adv.

Conill, Torrance, Calif. Carlos Martinez, gm. — Hispanic adv.

20 Unilever

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$149,885	\$117,020	28.1
Sunday magazine	10,047	2,840	253.8
B2B magazine	1,941	3,138	-38.1
Local magazine	38	7	442.9
Spanish-language magazine	2,505	1,056	137.2
Newspaper	392	1,154	-66.0
National newspaper	1,023	181	465.2
Spanish-language newspaper	49	68	-27.9
FSI	36,468	46,160	-21.0
Network TV	225,913	259,026	-12.8
Spot TV	18,009	30,237	-40.4
Syndicated TV	45,417	47,519	-4.4
Cable TV network	64,217	82,364	-22.0
Spanish-language TV	17,085	16,684	2.4
Network radio	2,750	434	533.6
National spot radio	3,649	6,649	-45.1
Outdoor	5,696	791	620.1
Internet	17,599	5,218	237.3
Measured media	602,683	620,546	-2.9
Unmeasured media	716,379	715,232	0.2
Total	1,319,062	1,335,778	-1.3
By brand	2004	2003	% chg
Dove	143,733	147,236	-2.4
Slim Fast	42,797	82,051	-47.8
All Detergent	30,517	10,670	186.0
Axe Deodorant	30,280	27,417	10.4
Carb Options	28,158	0	NA
Eternity Fragrances	27,003	16,379	64.9
Degree Antiperspirant	26,796	20,005	33.9
Vaseline	26,482	23,951	10.6
Suave	23,740	21,776	9.0

By brand	2004	2003	% chg
Lipton	20,779	25,723	-19.2
Snuggle	18,648	20,777	-10.2
Caress	14,480	13,458	7.6
Ponds	13,866	7,302	89.9
Hellmanns	12,744	15,280	-16.6
Skippy Peanut Butter	12,247	9,397	30.3
Ragu	11,970	20,843	-42.6
Shedds Country Crock	11,883	9,222	28.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$50,417	\$48,997	2.9
Earnings	2,343	3,151	-25.6
North America	2004	2003	% chg
Sales	11,231	11,261	-0.3
Division sales	2004	2003	% chg
Personal care	13,284	12,726	4.4
Savory & dressings	10,488	9,823	6.8
Home care	8,471	8,249	2.7
Ice cream & frozen foods	8,072	7,980	1.2
Spreads & cooking products	5,800	2,737	111.9
Beverages	4,004	4,072	-1.7
Other	297	410	-27.6

Headquarters

Unilever/3000 DK, PO Box 760, Rotterdam, Netherlands /Phone: 31-10-217-4000.

Unilever/700 Sylvan Ave., Englewood Cliffs, N.J. 07632/Phone: (201) 894-7760.

Personnel, brands, agencies

Corporate: Antony Burgmans, chmn; Patrick Cescau, CEO.

Ben & Jerry's Homemade: 30 Community Dr., South Burlington, Vt. 05403-6828/Phone: (802) 846-1500. Yves Couette, CEO; Walt Freese, dir-mktg.

In-house.

Good Humor-Breyers: 909 Packerland Dr., Green Bay, Wis. 54303/Phone: (920) 499-5151. Eric Walsh, pres; Terry Olson, VP-mktg.

Campbell Mithun, Minneapolis. Tim Hawley, sr VP & gm. — Breyers All Natural, Good Humor, Klondike, Popsicle.

Home & Personal Care: 33 Benedict Place, Greenwich, Conn. 06836/Phone: (203) 661-2000. Alan Jope, pres-Home & Personal Care, N. Amer.; Simon Clift, sr VP-global personal care; Jon Achenbaum, gm-hair; Stan Cook, gm-deodorant; Bill Littlefield, gm-specialty; Bob Shipley, gm-laundry.

Bartle Bogle Hegarty, New York. Bob Ferrini, acct mgr; Tina Wang, acct mgr. — Axe, All laundry detergent.

DDB Worldwide Communications, Chicago. Susan Lulich, acct super. — Degree.

JWT, New York. Rick Reilly, U.S. acct dir. — Caress, Lever 2000 bar soap, Lever 2000 body wash, Lever 2000 moisturising wipes, Therma silk shampoos, conditioners & styling aids, Vaseline Intensive care.

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Lowe Worldwide, New York. Michael Baer, exec VP & mg dir. — Snuggle, Wisk.

No agency. — Mentadent, Q-Tips.

Ogilvy & Mather Worldwide, New York & Chicago. Mike Hemingway, ww acct dir. — Dove, Ponds, Rave, Suave.

MindShare Worldwide, New York. Mike Styles, sr ptnr & strategic plng dir. — media svcs.

Slim-Fast Foods Co.: 777 S. Flagler Dr., West Tower, Ste. 1400, West Palm Beach, Fla. 33401/Phone: (561) 833-9920. John Rice, pres & CEO; Mark Covent, pres; Terry Olson, gm; Joanne Moscato-Hogan, interactive dir.

Ogilvy & Mather Worldwide, New York. Darren Kapelus, grp acct dir.

Unilever Bestfoods: 800 Sylvan Ave., Englewood Cliffs, N.J. 07632/Phone: (201) 567-8000. John W. Rice, pres & CEO; Michael Polk, pres-U.S. foods; David Landers, N. amer. pres & chief operating officer-UBF Foodsolutions; Mike Bauer, sr VP & gm-spreads & dressings; Bauke Rouwers, VP & gm-Lipton, Skipppy, Promise, Carb Options; Amanda Sourry, VP & gm-Ragu, Bertolli, Lawry's, Lipton Sides, Knorr; Lisa Klauser, VP-integrated mktg capability; Donna Goldfarb, sr dir-cons & mktg insight.

Dailey & Associates, Los Angeles. John Stranger, sr VP & grp mgmt super. — Lawry's.

DDB Worldwide Communications, New York. Suheil Pimentel, acct mgr. — Lipton tea, soups & prepared meals.

JWT, New York. Rick Reilly, U.S. acct dir. — Lipton Cup-A-Soup, Matika, Ragu pasta sauces.

McCann Erickson Worldwide, New York. Linda Luca, exec VP & grp mg dir. — I Can't Believe It's Not Butter, Skipppy peanut butter, Take Control.

Ogilvy & Mather Worldwide, New York. Darren Kapelus, grp acct dir. — Helman's, Wishbone.

Stone & Simons Advertising, Detroit. Douglas Stone, exec VP. — Brummel & Brown, Country Crock, Imperial.

MindShare Worldwide, New York. Mike Styles, sr ptnr & strategic plng dir; Dick Laurie, sr ptnr & strategic plng dir. — media svcs.

Unilever Cosmetics International: 725 Fifth Ave., New York, N.Y. 10022/Phone: (212) 759-8888. Fergus Balfour, pres & CEO; Hilary Dart, pres, Calvin Klein Cosmetics; Marisa Thalberg, VP-global adv & production.

CRK Advertising (In-house). — Calvin Klein cosmetics & fragrances.

94 United Parcel Service

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$11,406	\$6,734	69.4
Sunday magazine	2,218	2,581	-14.1
B2B magazine	2,978	2,931	1.6
Local magazine	NA	1	NA
Spanish-language magazine	39	187	-79.1
Newspaper	846	893	-5.3
National newspaper	5,599	4,613	21.4
Spanish-language newspaper	264	211	25.1

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Network TV	106,933	109,689	-2.5
Spot TV	526	1,452	-63.8
Syndicated TV	NA	248	NA
Cable TV network	23,872	19,527	22.3
Network radio	1,140	367	210.6
National spot radio	21,742	17,016	27.8
Outdoor	110	117	-6.0
Internet	5,504	863	537.8
Yellow Pages	5,758	5,797	-0.7
Measured media	188,935	173,227	9.1
Unmeasured media	177,420	157,210	12.9
Total	366,355	330,437	10.9
By brand	2004	2003	% chg
UPS	183,114	160,071	14.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$36,582	\$33,485	9.2
Earnings	3,333	2,898	15.0
U.S.	2004	2003	% chg
Sales	28,820	27,924	3.2
Division sales	2004	2003	% chg
U.S. domestic package	26,610	25,022	6.3
International package	6,762	5,561	21.6
Non-package	3,210	2,902	10.6

Headquarters

United Parcel Service/55 Glenlake Pkwy. N.E., Atlanta, Ga. 30328/Phone: (404) 828-6000.

Personnel, brands, agencies

Corporate: Michael L. Eskew, chmn & CEO; Kurt Kuehn, sr VP-ww sls & mktg; Gary Mastro, VP-brand & prod mktg; Larry Bloomenkranz, VP-brand mgmt & adv; Betsy Wilson, media mgr; Phillip Cantilo, adv mgr.

Martin Agency, Richmond, Va. Ian Davidson, exec VP; Chris Mumford, VP & mgmt super; Matt Williams, sr VP & sr strategic planner; Mark Pavia, sr VP & exec media dir.

Lowe Worldwide, New York. Elissa Goldman, exec VP & dir-media svcs. — media buying-natl bdcst.

UPS Store/Mail Boxes Etc.: 6060 Cornerstone Ct. W., San Diego, Calif. 92121-3795/Phone: (858) 455-8800. Stuart Mathis, pres; Tom Crockett, VP-mktg.

Doner, Detroit. Greg Gerfen, sr VP & acct dir.

25 U.S. Government

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$121,376	\$116,961	3.8
Sunday magazine	13,193	14,281	-7.6
B2B magazine	6,997	5,069	38.0
Local magazine	76	45	68.9
Spanish-language magazine	3,189	2,481	28.5
Newspaper	34,786	30,198	15.2
National newspaper	12,366	17,604	-29.8

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Spanish-language newspaper	2,201	1,568	40.4
Network TV	209,195	203,364	2.9
Spot TV	29,792	40,573	-26.6
Syndicated TV	34,508	21,534	60.2
Cable TV network	134,846	113,284	19.0
Spanish-language TV	41,921	41,794	0.3
Network radio	13,630	12,512	8.9
National spot radio	19,377	11,474	68.9
Outdoor	5,420	6,353	-14.7
Internet	29,674	15,586	90.4
Measured media	712,547	654,681	8.8
Unmeasured media	515,982	467,962	10.3
Total	1,228,529	1,122,643	9.4
By brand	2004	2003	% chg
Office of Natl Drug Cntrl Policy	181,589	182,498	- 0.5
U.S. Army	140,686	117,755	19.5
USPS	75,891	43,140	75.9
U.S. Dept/Health & Human Svcs	64,579	38,107	69.5
U.S. Air Force	52,087	59,535	-12.5
Amtrak	25,660	25,412	1.0
U.S. Navy	24,247	27,107	-10.6
U.S. Marines	20,769	15,291	35.8
IRS	16,004	7,564	111.6
CDC Services	15,709	32,629	-51.9
U.S. Dept of Trans	12,505	7,990	56.5
U.S. Mint	11,901	10,337	15.1

Headquarters

U.S. Government/Washington, D.C.

Personnel, brands, agencies

Air National Guard: ANG/DPR, Ste. 10415, 1411 Jefferson Davis Hwy., Arlington, Va. 22202/Phone: (703) 607-3248. Maj. Mary Burrus, chief-recruiting & retention, adv resources & training branch.

Laughlin Marinaccio & Owens Advertising, Arlington, Va. Chris Laughlin, acct exec. — U.S. Air National Guard.

Amtrak: 10 G St., N.E./Ste. 3E-562, Washington, D.C. 20002/Phone: (202) 906-4806. David Gunn, CEO; David Lim, VP-mktg & brand mgmt; Gail Reisaman, sr dir-adv & brand mgmt.

Arnold Worldwide, McLean, Va. Nick Teare, VP & grp acct dir. — Amtrak.

Army National Guard: NGB-ASM/1411 Jefferson Davis Hwy., Arlington, Va. 22202/Phone: (703) 607-3563. Lt.Gen. H Steven Blum, chief; Lt. Col. Michael Jones, deputy-chief, Army strength maintenance division.

Laughlin Marinaccio & Owens Advertising, Arlington, Va. Doug Laughlin, pres. — Air National Guard.

Docupak, Birmingham, Ala. Philip Crane, acct super. — sls promo & direct mktg.

Bureau of Engraving & Printing: 14th St. and C St. SW, Washington, D.C. 20228/Phone: (202) 874-3545. Thomas A. Ferguson, dir; Dawn Haley, chief-external relations.

Burson-Marsteller, Washington. James C. Lake, client mg ptr. — currency introduction campaign.

Centers for Disease Control & Prevention: 4770 Buford Highway, NE, Atlanta, Ga. 30341/Phone: (770) 488-6480. Dr. Julie Louise Gerberding, dir; Faye Wong, dir-VERB campaign; Lori Asbury, creative team lead-VERB campaign.

Saatchi & Saatchi, New York. Amy Fischer, sr VP & mgmt dir. — Centers for Disease Control.

A Partnership, New York. Anita Lai, acct dir. — Asian-American adv.

Frankel (an Arc Worldwide co.), Chicago. Eric Rosenthal, sr VP & gm-promo & shopper mktg — interactive & promo mktg.

Garcia 360, San Antonio. Galeana Woodson, acct dir. — Hispanic adv.

G&G Advertising, Albuquerque, N.M. Michael Gray, pres & creative dir. — American Indian adv.

Manning, Selvage & Lee, Washington. Larry Haas, sr VP — pr.

PFI:Marketing, New York. David Prince, pres & mg ptr. — African-American adv.

Central Intelligence Agency: CIA Recruitment Center, Washington, D.C. 20505/Phone: (703) 482-0623. Porter Goss, dir.

In-house. — recruitment adv.

Department of Homeland Security: Nebraska Ave. Complex (NAC), 3801 Nebraska Ave., N.W., Washington, D.C. 20528/Phone: (202) 282-8000. Michael Chertoff, secretary; Brian Besanceney, asst sec-pub affairs.

Agencies assigned on a project basis.

Department of the Army: Office of the Assistant Secretary of the Army, Brand Group, Washington, D.C. 20310/Phone: (703) 697-3447. Hon. Dr. Francis J. Harvey, secretary-U.S. Army; Gen. Peter J. Schoomaker, chief of staff-Army; Daniel B. Denning, acting asst secretary-manpower & reserve affairs; John P. McLaurin III, deputy asst secretary-human resources; Barry N. Lipsy, chief mktg officer.

Leo Burnett Worldwide, Chicago. Ray DeThorne, exec VP & acct dir. — United States Army.

Starcom USA, Chicago. Andrew Swinard, sr VP & grp client dir. — media svcs.

Arc Worldwide, Chicago. Kelly Twohig, VP & acct dir. — interactive mktg, point-of-sale/merchandising, database mktg & analytical support.

Housing & Urban Development: 451 Seventh St. S.W., Room 9166, Washington, D.C. 20410/Phone: (202) 708-0317. Alphonso Jackson, secretary; Valerie Hayes, dir-office of small & disadvantaged bus utilization.

Agencies assigned on a project basis.

Internal Revenue Service: 1111 Constitution Ave. N.W., Washington, 20224/Phone: (202) 622-4349. Jodi Patterson, dir-comms; Gail Ellis, chief-mktg.

Footo Cone & Belding Worldwide, New York. Rosanne Ruppel, acct dir. — Internal Revenue Service.

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Joint Advertising, Market Research & Studies: 4040 Fairfax Dr., Ste. 200, Arlington, Va. 22203/Phone: (703) 696-0850. Matt Boehmer, prog mgr; Maj. Rene Stockwell, chief-joint adv; Lt. Laurie Frank, project officer-joint adv; Capt. Maurice Brown, project officer-joint adv; Andrea Zucker, project officer-market research & studies.

Mullen, Wenham, Mass. Leah Keney, acct dir.

Office of National Drug Control Policy: 750 17th St. NW, Washington, 20503/Phone: (202) 395-6627. John P. Walters, dir; Robert Denniston, dir-nat'l youth anti-drug media campaign; Kendall B. Oliphant, deputy dir-nat'l youth anti-drug media campaign.

Foote Cone & Belding Worldwide, San Juan, Pr. Carmen Cedre, VP & gm.

Foote Cone & Belding Worldwide, New York. Kim Corrigan, acct dir. — media plng.

Fleishman-Hillard, Washington. Ann Davison, sr VP acct dir. — news media outreach.

G&G Advertising, Albuquerque, N.M. Michael gray, pres. — American-Indian & Alaska Native populations.

Latinvox, New York. Roberto Ramos, pres & acct dir. — Hispanic adv.

IW Group, Los Angeles. Nita Song, pres. — Asian-American adv.

U.S. Air Force: Air Force Recruiting Service RSM, 550 D St. W., Ste 1, Randolph AFB, Texas 78150-4527/Phone: (210) 565-0503. Michael L. Dominguez, secretary; Brig. Gen. Dutch Remkes, cmdr-Air Force recruiting svcs; Col. Bob East, vice cmdr; Col. Brian Madtes, chief-mktg div; Tim Talbert, deputy chief-mktg div. **GSD&M**, Austin, Texas. Lee Pilz, acct dir. — U.S. Air Force.

Cultura, Dallas. Scott Gassert, assoc media dir. — Hispanic adv.

LatinWorks Marketing. April Alejandro, grp dir. — Hispanic adv.

Merkle, Lanham, Md. Michael Matthias, sr VP-client mgmt svcs. — Database mgmt.

Tribal DDB, Dallas. Jeff Erickson, acct exec. — interactive mktg.

U.S. Air Force Reserve: HQAFRC/RSAA, 1000 Corporate Pointe, Warner Robins, Ga. 31088/Phone: (478) 327-0655. Col. Francis M. Mungavin, dir-recruiting; Lt. Col. Jerry Herbel, chief-adv & info systems; Chief Master Sgt. R. Eric Snipes, chief-adv branch.

Blaine Warren, Henderson, Nev. Louise Ad-Duri, acct mgr. — U.S. Air Force Reserve.

U.S. Army Accessions Command: Strategic Outreach Office, Fort Knox, Ky. 40121-2726/Phone: (502) 626-0141. Lt. Gen. Robert L. VanAntwerp, commanding genl; Col. Thomas Nickerson, dir-strategic outreach.

Leo Burnett Worldwide, Chicago. Ray DeThorne, exec VP & acct dir.

Cartel Group, San Antonio. Fernando Del Bosque, acct exec; Jessie De La Llata, sr acct exec. — Hispanic adv.

Muse, New York. Larry Glover, acct exec. — multicultural adv.

U.S. Army Cadet Command: Recruiting, Retention, Marketing & Operations, U.S. Army Cadet Command, Bldg. 56, Fort

Monroe, Va. 23651-5000/Phone: (757) 788-4850. Col. Michael J. Hoff, dir-recruiting, retention, mktg & ops.

Leo Burnett Worldwide, Chicago. Tim Bergin, exec VP & acct dir; Ray DeThorne, exec VP & acct dir.

U.S. Army Reserve: Advertising through US Army Accessions Command, Strategic Outreach Directorate, Advertising Division, 1307 Third Ave, Fort Knox, Ky. 40121/Phone: (502) 220-5142. Lt. Gen. James R. Helmly, chief; Brig. Gen. James A. Kelley, chief of staff.

Leo Burnett Worldwide, Chicago. Ray DeThorne, exec VP & acct dir.

U.S. Coast Guard (Dept. of Homeland Security): U.S. Coast Guard Recruiting Command, 4200 Wilson Blvd., Ste. 450, Arlington, Va. 22203-1804/Phone: (202) 493-6646. Adm. Thomas H. Collins, commandant; Mauro Cooper, chief-recruit adv.

Cossette Post, New York. Fred Morris, VP-client relationship mgr; Peter Beiro, media super.

U.S. Marine Corps: Marine Corps Recruiting Command, 3280 Russell Rd., Quantico, Va. 22134/Phone: (703) 784-9434. Brig. Gen. Walter Gaskin, commanding genl; Maj. Michael Zelif, asst chief of staff-adv.

JWT, Atlanta. Jeff White, pres & gm. — U.S. Marine Corps.

MindShare Worldwide, New York. Andie Fox, mg dir-Atlanta. — media svcs.

Merkle, Lanham, Md. Michael Matthias, sr VP-client mgmt svcs. — Database mgmt.

U.S. Mint: 801 Ninth St. NW, Washington, D.C. 20220/Phone: (202) 874-6000. Henrietta Holsman Fore, dir; Gloria Eskridge, assoc dir-mktg.

Greenberg, Seder, James & Sterling, Washington, D.C.. — United States Mint, state quarters, Westward Journey nickel series, American Eagle silver, gold & platinum proof coins.

U.S. Navy: Navy Recruiting Command, 5722 Integrity Drive Bldg. 784, Millington, Tenn. 38054/Phone: (901) 874-9388. Rear Adm. Jeffrey L. Fowler, Cmdr-Navy Recruiting Command; Capt. David Faasse, dir-adv & mktg.

Campbell-Ewald, Warren, Mich. Kathleen M. Donald, exec VP & acct dir.

Accent Marketing, Miami. Lisette Hoyo, acct dir. — Hispanic mktg.

GlobalHue, Southfield, Mich. Allen Pugh, exec VP & dir-client svcs. — African-American adv.

U.S. Postal Service: 475 L'Enfant Plaza SW, Room 1141, Washington, D.C. 20260-1019/Phone: (202) 268-3050. John E. Potter, postmaster general & CEO; Rod DeVar, mgr adv.

Campbell-Ewald, Detroit. Mark Bellissimo, exec VP & acct dir. — United States Postal Service.

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9 Verizon Communications

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$32,522	\$35,618	-8.7
Sunday magazine	779	NA	NA
B2B magazine	2,198	3,551	-38.1
Local magazine	28	92	-69.6
Spanish-language magazine	730	429	70.2
Newspaper	579,482	456,098	27.1
National newspaper	64,834	52,873	22.6
Spanish-language newspaper	3,855	1,563	146.6
FSI	2	NA	NA
Network TV	227,441	249,527	-8.9
Spot TV	214,007	153,364	39.5
Syndicated TV	10,166	6,969	45.9
Cable TV network	85,572	73,946	15.7
Spanish-language TV	26,867	22,115	21.5
Network radio	NA	132	NA
National spot radio	101,693	79,219	28.4
Outdoor	41,391	28,214	46.7
Internet	124,576	32,461	283.8
Yellow Pages	11,880	10,823	9.8
Measured media	1,528,023	1,206,994	26.6
Unmeasured media	669,283	465,002	43.9
Total	2,197,306	1,671,996	31.4
By brand	2004	2003	% chg
Verizon	1,505,941	1,180,877	27.5
Superpages	10,151	14,807	-31.4

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$71,283	\$67,468	5.7
Earnings	7,831	3,077	154.5
U.S.	2004	2003	% chg
Sales	69,269	65,303	6.1
Division sales	2004	2003	% chg
Domestic telecom	38,551	39,602	-2.7
Domestic wireless	27,662	22,489	23.0
Information services	3,615	3,830	-5.6
International	2,014	1,949	3.3

Headquarters

Verizon Communications/1095 Ave. of the Americas, New York, N.Y. 10016/Phone: (212) 395-2121.

Notes

Verizon Communications in February agreed to buy MCI Corp. for \$6.7 billion. MCI gives Verizon an additional 14 million residential customers and 1 million corporate accounts. MCI's former CEO Bernard J. Ebbers was found guilty in mid-March 2005 on all nine counts of directing an \$11 billion fraud that in 2002 bankrupted the company then known as WorldCom.

Personnel, brands, agencies

Corporate: Ivan Seidenberg, chmn & CEO; Robert Ingalls, pres-retail mkts; Jerri DeVard, sr VP-brand mgmt & mktg comms; Mary Ellen Payne, VP-cons mktg comms; Monte Beck, VP-bus mktg comms; Amy Rubenstein, VP-brand mgmt & media; Donald Klika, exec dir-brand identity & design.

McGarry Bowen, New York. Tarik Sedky, acct dir. — Verizon telecommunications svcs.

Verizon Media at Zenith (a joint venture of Zenith Media and ID Media), New York. Wendy Marquardt, pres-VmZ. — media svcs, Brand campaign, cons & bus DSL, FiOS (fiber optics), diversity, wholesale (trade) & Avenue (trade awareness).

Avenue A/Razorfish, New York. Patrick Houndsell, grp acct dir. — interactive media svcs.

AdAsia Communications, New York. Kevin Lee, pres; Annie Shih, acct dir. — Asian-American adv & media buying.

Brandgenuity, New York. Adina Avery-Grossman, mg dir. — licensing.

Burrell Communications Group, Chicago. McGhee Williams, co-CEO; Jacqueline High, sr VP & acct mgmt dir. — African-American adv.

Draft, New York. Nancy Grebey, exec VP. — direct mktg & prod adv.

La Agencia de Orci & Asociados, Los Angeles. Dilys T. Garcia, chief operating officer; Leon Potasinki, sr VP & media dir. — Hispanic adv & media buying.

Landor Associates, New York. Joan Bogin, exec dir. — brand strategy & design.

R/GA, New York. Richard Marks, acct dir. — interactive mktg.

Verizon Information Services: Verizon Place, 2200 W. Airfield Dr., DFW Airport, Texas 75261-9810/Phone: (972) 453-7000. Katherine J. Harless, pres; Mike Pawlowski, VP-mktg & strategic plng; Rolando Rivas, dir-mktg comms & branding.

Kirschenbaum Bond & Partners, New York. Rosemarie Ryan, pres. — Verizon SuperPages.

Verizon Media at Zenith, New York. Wendy Marquardt, pres-VmZ. — media buying & plng-West, Verizon SuperPages.

Verizon Wireless: 180 Washington Valley Rd., Bedminster, N.J. 07921/Phone: (908) 306-7000. Dennis F. Strigl, pres & CEO; Lowell McAdam, exec VP & chief operating officer; John Stratton, VP & chief mktg officer.

McCann Erickson Worldwide, New York. Thom Gruhler, exec VP & grp mg dir. — Verizon Wireless telecommunications.

Verizon Media at Zenith, New York. Wendy Marquardt, pres-VmZ. — media buying.

GlobalHue, Southfield, Mich. Christopher Campos, exec VP & dir-client svcs, Hispanic. — multicultural adv.

Viva Partnership, Miami. Linda Gonzales, pres. — Hispanic media svcs.

26 Viacom

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$114,031	\$113,548	0.4
Sunday magazine	9,873	4,958	99.1
B2B magazine	19,553	19,431	0.6
Local magazine	252	188	34.0
Spanish-language magazine	160	134	19.4
Newspaper	110,467	125,564	-12.0
National newspaper	37,406	39,712	-5.8
Spanish-language newspaper	770	673	14.4

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U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Network TV	133,971	138,444	-3.2
Spot TV	62,484	63,624	-1.8
Syndicated TV	27,948	25,155	11.1
Cable TV network	110,362	123,220	-10.4
Spanish-language TV	7,231	5,833	24.0
Network radio	10,822	15,112	-28.4
National spot radio	30,182	36,094	-16.4
Outdoor	27,060	19,285	40.3
Internet	21,789	17,248	26.3
Measured media	724,361	748,223	-3.2
Unmeasured media	482,906	402,888	19.9
Total	1,207,267	1,151,111	4.9
By brand	2004	2003	% chg
Paramount	388,658	417,223	-6.8
Viacom Videos	82,264	82,003	0.3
CBS	68,255	57,807	18.1
Blockbuster	56,076	31,514	77.9
Showtime Cable TV	23,169	25,003	-7.3
Nickelodeon Cable TV	20,662	18,675	10.6
Comedy Central Cable TV	14,149	17,153	-17.5
MTV	11,534	11,407	1.1

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$22,526	\$20,828	8.2
Earnings	-17,462	2,238	NA
U.S.	2004	2003	% chg
Sales	18,812	17,488	7.6
Division sales	2004	2003	% chg
Television	8,505	7,761	9.6
Cable Networks	6,579	5,646	16.5
Entertainment	4,056	4,101	-1.1
Radio	2,096	2,098	-0.1
Outdoor	1,880	1,748	7.6

Headquarters

Viacom/1515 Broadway, New York, N.Y. 10036/Phone: (212) 258-6000.

Notes

Viacom this June announced it would split into two companies by first quarter 2006. The new Viacom will include MTV Networks (including MTV, VH1, Nickelodeon, Nick at Nite, Comedy Central, CMT: Country Music Television, Spike TV, TV Land and many other networks around the world), BET, Paramount Pictures, Paramount Home Entertainment and Famous Music. It will be headed by Tom Freston, current co-chief operating officer. The other company, to be called CBS Corp., will be led by Leslie Moonves and will combine the CBS and UPN broadcast networks, Viacom Television Stations Group, Infinity Broadcasting, Viacom Outdoor, the CBS, Paramount and King World television production and syndication operations, as well as Showtime, Simon & Schuster and Paramount Parks. Mr. Moonves is current co-chief operating officer. Sumner Redstone, current Viacom chairman and 71% owner, will chair both. The new CBS presumably will be attractive to investors because of its strong free cash flow with industry-leading positions across its

units. Viacom hopes the new Viacom, with its focus on fast-growth cable without the leadening influence of the slower-growth media operations, will produce a higher share price. The moves were made to energize Viacom stock which had been trading at 45% under May 31, 2000 levels.

Personnel, brands, agencies

Corporate: Sumner Redstone, chmn & CEO; Tom Freston, co-pres & co-chief operating officer; Leslie Moonves, co-pres & co-chief operating officer.

BET: 1 Bet Plaza, 1235 W Place NE, Washington, D.C., 20018/Phone: (202) 608-2000. Robert L. Johnson, founder & chmn; Debra Lee, pres & CEO; Louis Carr, pres-media sls; Kelli Lawsom, exec VP-corp mktg; Brucetta Williams, VP, off-channel mktg; Michael Lewellen, sr VP-corp comms.

In-house. — off-channel mktg.

CBS Television: 51 W. 52nd St., New York, N.Y. 10019/Phone: (212) 975-4321. Joann Ross, pres-sls; George Schweitzer, pres-CBS mktg grp.

In-house.

Carat North America, New York. John Adams, grp acct dir. — media svcs.

Infinity Broadcasting: 1515 Broadway, New York, N.Y. 10036/Phone: (212) 846-3939. Joel Hollander, chmn & CEO; David Goodman, pres-mktg.

No agency.

MTV Networks: 1515 Broadway, New York, N.Y. 10039/Phone: (212) 258-8000. Judy McGrath, chmn & CEO-MTV Networks; Herb Scannell, vice chmn-MTV Networks & pres-Nickelodeon Networks; Christina Norman, pres-MTV Networks; Sue Donaher, exec VP-Nickelodeon, Nick at Nite, TV Land ad sls; Dough Rohrer, exec VP & genl sls mgr-MTV, MTV2, VH1, CMT ad sls; Larry Divney, pres & CEO-ad sls; Van Toffler, pres-MTVN Music Group, LOGO; Maureen Taxter, VP-cons prods mktg & retail; Dave Cohn, exec VP & gm-MTV2; Brian Philips, exec VP & gm-CMT; Cathy Tankosic, sr VP-mktg; Doug Herzog, pres-Comedy Central; Richard Loomis, sr VP-mktg & brand strategy, Comedy Central.

Colby & Partners, Santa Monica, Calif. Dale Lanier, acct exec & exec producer. — print & bdcst adv, Spike TV.

Dom Camera Associates, New York. Dom Camera, chmn & CEO. — Spike TV.

In-house. — CMT, MTV, MTV2, Nickelodeon, Nick at Nite, VH-1.

MPG, New York. Eva Kantrowitz, sr VP & grp acct dir. — media svcs, Comedy Central.

Paramount Home Entertainment: 5555 Melrose Ave., Los Angeles, Calif. 90038/Phone: (323) 956-5000. Thomas Lesinski, pres-ww home entertainment; Meagan Burrows, pres-domestic home entertainment; Michael Arkin, sr VP-mktg.

Mediaedge:cia, Los Angeles. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Dina Marovich, grp dir. — media svcs.

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Paramount Parks: 8720 Red Oak Blvd., Ste. 315, Charlotte, N.C. 28217/Phone: (704) 561-8100. Brett Petit, sr VP-corp mktg; Dale Kaetzel, VP-mktg, Paramount's Carowinds; Bob White, VP-mktg, Paramount's Great America; Bob Hohenstein, VP-mktg, Paramount's King's Dominion; Linda Jensen, VP-mktg, Paramount's King's Island.

Barkley Evergreen & Partners, Kansas City, Mo. Heather Winker, acct dir; Knox Duncan, sr VP & media.

Paramount Pictures: 5555 Melrose Ave., Los Angeles, Calif. 90038/Phone: (323) 956-5000. Brad Grey, chmn & CEO-Paramount Motion Picture Group; Rob Friedman, chief operating officer-Paramount Pictures & vice chmn-motion picture grp; Joanna Johnson, exec VP-ww publicity; Steven Siskind, exec VP-natl adv & promo; Nancy Kirkpatrick, exec VP-ww publicity; David Dinerstein, co-pres-Paramount Classics; Ruth Vitale, co-pres-Paramount Classics.

Mediaedge:cia, Los Angeles. Charles Courtier, exec chmn ww; Lee Doyle, mg ptnr & client svcs dir; Dina Marovich, grp dir. — media svcs.

Starcom MediaVest, New York. Christine Merrifield-Wehr, sr VP & grp dir. — media buying.

Paramount Television: 5555 Melrose Ave., Los Angeles, Calif. 90038/Phone: (323) 956-5000. David Stapf, pres-Paramount Network Television; John Wentworth, exec VP-comms; Michael Mischler, exec VP-mktg, domestic TV.

In-house.

Mediaedge:cia, Los Angeles. Charles Courtier, exec chmn ww; Lee Doyle, mg ptnr & client svcs dir; Dina Marovich, grp dir. — media svcs.

Showtime Networks: 1633 Broadway, New York, N.Y. 10019/Phone: (212) 708-1600. Matthew Blank, chmn & CEO; Len Fogge, exec VP-creative & mktg; Geof Rochester, sr VP-acquisition mktg; Alan Zapakin, sr VP-prog mktg & on-air; George DeBolt, VP-media.

Red Group (in-house) Frank Pintauro, sr VP & gm-Red Group.

MKA, New York. Michael Yuen, principal.

Starcom USA, Chicago. Ann Copsey, asst dir-media. — media svcs.

Simon & Schuster: 1230 Ave. of the Americas, New York, N.Y. 10020/Phone: (212) 698-7000. Jack Romanos, pres & CEO; Carolyn K. Reidy, pres-adult publishing grp; Michael Selleck, sr VP & exec dir-sls & mktg, adult publishing; Rick Richter, pres-children's publishing; Suzanne Murphy, VP-mktg, children's publishing.

In-house.

UPN: 11800 Wilshire Blvd., Los Angeles, Calif. 90025/Phone: (310) 575-7000. Dawn Ostroff, pres; Rachel Clark, sr VP-mktg.

Carat Interactive, Los Angeles. Mylene Valbuena, acct exec. — media svcs.

76 Visa International

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$27,975	\$27,378	2.2
Sunday magazine	.395	NA	NA
B2B magazine	6,564	2,517	160.8
Local magazine	NA	28	NA
Spanish-language magazine	.98	150	-34.7
Newspaper	3,071	2,764	11.1
National newspaper	1,720	1,612	6.7
Spanish-language newspaper	NA	2	NA
FSI	.8	54	-85.2
Network TV	191,290	184,511	3.7
Spot TV	10,197	2,256	352.0
Syndicated TV	10,124	15,309	-33.9
Cable TV network	50,382	46,204	9.0
Spanish-language TV	9,786	9,666	1.2
Network radio	4,461	6,765	-34.1
National spot radio	6,112	3,403	79.6
Outdoor	.932	1,250	-25.4
Internet	30,649	46,699	-34.4
Measured media	353,764	350,568	0.9
Unmeasured media	151,601	136,058	11.4
Total	505,365	486,626	3.9
By brand	2004	2003	% chg
Visa	353,755	350,513	0.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$1,434	\$1,376	4.2
Earnings	.32	19	68.4
U.S.	2004	2003	% chg
Sales	.538	531	1.3

Headquarters

Visa International/P.O. Box 8999, San Francisco, Calif. 94128/Phone: (650) 432-3200.

Personnel, brands, agencies

Corporate: Christopher Rodrigues, pres & CEO; John Elkins, exec VP-global brand & mktg.

Visa USA: P.O. Box 194607, San Francisco, Calif. 94119/Phone: (415) 932-2100. Carl F. Pascarella, pres & CEO; Susanne Lyons, chief mktg officer; Kevin Burke, sr VP-adv & branding; Nancy Friedman, VP-adv; Michael Lynch, sr VP-event & sponsorship mktg.

BBDO Worldwide, New York. Nancy Hill, exec VP & mg dir.

OMD Worldwide, New York. Matt Kasindorf, plng & print buying; John Mattimore, natl bdcst buying. — media svcs.

Agency.com, San Francisco. Melissa Eisenberg, client ptnr. — interactive mktg.

Frankel (an Arc Worldwide co.), San Francisco. Lori Leiva, sr VP & dir client svcs. — promo, interactive, direct mktg.

WING Latino, New York. Jackie Bird, pres & CEO; Tony Dagnery, VP-bus devel. — Hispanic adv.

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63 Volkswagen

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$73,713	\$77,257	-4.6
Sunday magazine	2,064	3,324	-37.9
B2B magazine	504	539	-6.5
Local magazine	267	597	-55.3
Spanish-language magazine	300	1,471	-79.6
Newspaper	12,304	21,341	-42.3
National newspaper	19,981	21,002	-4.9
Spanish-language newspaper	16	3	433.3
Network TV	203,026	187,838	8.1
Spot TV	69,449	73,848	-6.0
Syndicated TV	903	793	13.9
Cable TV network	13,558	25,919	-47.7
Spanish-language TV	10,540	12,293	-14.3
National spot radio	1,356	15,599	-91.3
Outdoor	1,568	4,129	-62.0
Internet	8,148	4,522	80.2
Measured media	417,697	450,475	-7.3
Unmeasured media	162,437	159,916	1.6
Total	580,134	610,391	-5.0
By brand	2004	2003	% chg
Volkswagen	338,200	367,821	-8.1
Audi	78,631	82,352	-4.5

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$111,113	\$96,799	14.8
Earnings	.894	1,145	-21.9
North America	2004	2003	% chg
Sales	16,621	17,132	-3.0
Division sales	2004	2003	% chg
Automotive	100,234	87,240	14.9
Financial svcs	10,879	9,560	13.8

Headquarters

Volkswagen/D-38436, Wolfsburg, Germany /Phone: 49-5361-923596.

Volkswagen of America, 3800 Hamlin Rd., Auburn Hills, Mich. 48326/Phone: (248) 754-5000.

Personnel, brands, agencies

Corporate: Bernd Pischetsrieder, chmn; Frank Witter, pres & CEO-Volkswagen of America.

Audi of America: 3800 Hamlin Rd., Auburn Hills, Mich. 48326/Phone: (248) 754-5000. Johan de Nysschen, exec VP; Reinhard Fischer, dir-sls plng & distribution; Stephen Berkov, dir-mktg; Mary Ann Wilson, mktg comms mgr.

McKinney & Silver, Durham, N.C. Lee Newman, sr VP & grp acct dir. — Audi vehicles.

MediaCom, New York. Bret Itskowitch, sr VP & grp dir. — media buying.

Bentley Motors: 3800 Hamlin Rd., Auburn Hills, Mich. 48326/Phone: (248) 754-6464. Andrew Stuart, CEO-N. Amer.; David Goggins, dir-mktg & comms.

Fuse Communicaton, Birmingham, Mich. Julie Barnard, dir. — Bentley vehicles.

Volkswagen of America: 3800 Hamlin Rd., Auburn Hills, Mich. 48326/Phone: (248) 754-5000. Len Hunt, VP; Kerri Martin, dir-mkt devel; Karen Marderosian, dir-mktg & adv.

Arnold Worldwide, Boston. John Castle, mg ptrn. — Volkswagen vehicles.

MediaCom, New York. David Fasola, sr VP & grp dir. — media svcs.

CreativeOnDemand, Coral Gables, Fla. Daniel Marrero, ptrn. — Hispanic adv.

WING Latino, New York. Jackie Bird, pres & CEO; Tony Dagnery, VP-bus devel. — Hispanic media svcs.

40 Wal-Mart Stores

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$21,515	\$13,974	54.0
Sunday magazine	24,202	10,992	120.2
B2B magazine	1,071	836	28.1
Spanish-language magazine	783	70	NA
Newspaper	19,536	15,726	24.2
National newspaper	2,486	116	NA
Spanish-language newspaper	312	70	345.7
FSI	3,713	3,740	-0.7
Network TV	217,053	179,524	20.9
Spot TV	80,749	106,189	-24.0
Syndicated TV	43,433	38,892	11.7
Cable TV network	62,921	68,957	-8.8
Spanish-language TV	50,108	28,158	78.0
Network radio	18,454	2,993	516.6
National spot radio	2,143	1,325	61.7
Outdoor	829	411	101.7
Internet	49,495	17,595	181.3
Yellow Pages	1,426	2,551	-44.1
Measured media	600,229	492,119	22.0
Unmeasured media	241,131	201,921	19.4
Total	841,360	694,040	21.2
By brand	2004	2003	% chg
Wal-Mart	578,370	476,804	21.3
Sams Club	16,668	9,014	84.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$285,222	\$256,329	11.3
Earnings	10,267	9,054	13.4
U.S.	2004	2003	% chg
Sales	228,945	208,757	9.7
Division sales	2004	2003	% chg
Wal-Mart	191,826	174,220	10.1
International	56,277	47,572	18.3
Sam's Club	37,119	34,537	7.4

Headquarters

Wal-Mart Stores/702 S.W. Eighth St., Bentonville, Ark. 72716/Phone: (479) 273-4000.

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Personnel, brands, agencies

Corporate: S. Robson Walton, chmn; Lee Scott, Jr., pres & CEO. **Bernstein-Rein Advertising**, Kansas City, Mo. Skip Rein, vice chmn; Rusty Scholtes, sr VP. — corp adv & media.

Sam's Club: 608 S.W. Eighth St., Bentonville, Ark. 72716/Phone: (479) 273-4000. Kevin Turner, pres & CEO; Doug McMillon, exec VP-merch.

GSD&M, Austin, Texas. Klaudia Flanigin, VP & acct dir. — Sam's Club.

Wal-Mart Stores: 702 S.W. Eighth St., Bentonville, Ark. 72716/Phone: (479) 273-4000. Mike Duke, pres & CEO; John Fleming, exec VP-mktg; Julie Lyle, VP-mktg; Randy Hughes, dir-media.

GSD&M, Austin, Texas. Alicia Smith Kriese, sr VP & grp dir. — Wal-Mart stores.

E. Morris Communications, Chicago. Eugene Morris, chmn & CEO; Jackie McCauley, sr VP & dir-client svcs. — African-American adv.

Lopez Negrete Communications, Houston. Alex Lopez Negrete, pres; Adalis Arroyo, grp acct dir. — Hispanic adv.

83 Wendy's International

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$38,114	\$32,934	15.7
B2B magazine	13	26	-50.0
Local magazine	4	NA	NA
Spanish-language magazine	176	323	-45.5
Newspaper	41	81	-49.4
National newspaper	153	181	-15.5
Spanish-language newspaper	18	1	NA
Network TV	167,349	150,599	11.1
Spot TV	47,927	44,592	7.5
Syndicated TV	35,240	32,717	7.7
Cable TV network	43,272	34,597	25.1
Spanish-language TV	18,167	14,263	27.4
Network radio	NA	120	NA
National spot radio	3,134	3,399	-7.8
Outdoor	7,349	7,022	4.7
Internet	737	1,465	-49.7
Measured media	361,694	322,320	12.2
Unmeasured media	74,082	64,503	14.9
Total	435,776	386,823	12.7
By brand	2004	2003	% chg
Wendy's	353,580	316,088	11.9

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$3,635	\$3,149	15.4
Earnings	52	236	-78.0
U.S.	2004	2003	% chg
Sales	2,475	2,197	12.7
Division sales	2004	2003	% chg
Wendy's	2,433	2,191	11.0
Tim Hortons	996	807	23.4
Developing Brands	206	151	36.4

Headquarters

Wendy's International/4288 W. Dublin-Granville Rd., P.O. Box 256, Dublin, Ohio 43017/Phone: (614) 764-3100.

Personnel, brands, agencies

Corporate: Jack Schuessler, chmn & CEO; Denny Lynch, sr VP-comms.

McCann Erickson Worldwide, New York. Gary Steele, exec VP.

Universal McCann Worldwide, New York. George Hayes, exec VP & client svcs dir. — media svcs.

Fresh Enterprises: 100 Moody Ct., Ste. 200, Thousand Oaks, Calif. 91360/Phone: (805) 495-4704. Bill Moreton, pres & CEO.

No agency.

TDL Group: 874 Sinclair Rd., Oakville, Ontario, Canada L6K 2Y1/Phone: (905) 845-6511. Paul D. House, pres & chief operating officer; Bill Moir, exec VP-mktg; Chris Laganos, sr VP-U.S..

Enterprise Creative Selling, Toronto, Ont.. Alison Simpson, pres. — Tim Hortons.

Wendy's North America: One Dave Thomas Blvd., Dublin, Ohio 43017-0256/Phone: (614) 764-3100. Thomas J. Mueller, pres & chief operating officer; Donald F. Calhoun, exec VP-mktg; Robert Levite, sr VP-mktg; Mary Ann Pilotte, sr VP-mktg; Michelle Fedurek, VP-media svcs; Jeff Whitney, VP-field mktg.

McCann Erickson Worldwide, New York. Gary Steele, exec VP.

Universal McCann Worldwide, New York. Rich Anderson, sr VP & mg dir. — media svcs.

Vidal Partnership, New York. Manny Vidal, founder; Tony Ruiz, ptrn. — Hispanic adv & media svcs.

42 Wyeth

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$23,924	\$45,523	-47.4
Sunday magazine	7,095	11,549	-38.6
B2B magazine	1,322	1,223	8.1
Spanish-language magazine	39	56	-30.4
Newspaper	117	11,839	-99.0
National newspaper	111	380	-70.8
Spanish-language newspaper	NA	43	NA
FSI	NA	493	NA
Network TV	127,785	127,426	0.3
Spot TV	3,393	5,064	-33.0
Syndicated TV	67,452	41,729	61.6
Cable TV network	63,840	58,152	9.8
Spanish-language TV	14,085	13,725	2.6
Network radio	11,228	19,216	-41.6
National spot radio	506	2,875	-82.4
Outdoor	9	256	-96.5
Internet	25,056	8,802	184.7
Measured media	345,962	348,351	-0.7
Unmeasured media	482,747	484,899	-0.4
Total	828,709	833,250	-0.5
By brand	2004	2003	% chg
Advil	104,257	95,639	9.0
Centrum	48,357	37,836	27.8

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U.S. ad spending (\$ in thousands)

By brand	2004	2003	% chg
Alavert	44,093	55,493	-20.5
Prempro	37,437	2,243	1569.3
Effexor Xr	25,689	48,117	-46.6
Synvisc	16,994	19,849	-14.4
Robitussin	14,899	17,286	-13.8
Dimetapp	14,581	17,054	-14.5
Preparation H	12,003	6,843	75.4
Chapstick	11,415	10,572	8.0
Caltrate	10,768	14,924	-27.8

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$17,358	\$15,851	9.5
Earnings	1,234	2,051	-39.8
U.S.	2004	2003	% chg
Sales	9,856	9,581	2.9
Division sales	2004	2003	% chg
Pharmaceuticals	13,964	12,623	10.6
Consumer Health Care	2,557	2,434	5.1
Animal Health	.836	.793	5.4

Headquarters

Wyeth/5 Giralda Farms, Madison, N.J. 07940/Phone: (973) 660-5000.

Personnel, brands, agencies

Corporate: Robert Essner, chmn, pres & CEO.

Wyeth Advertising (In-house) Richard Feldheim, pres; Marianne McArdle, exec VP-natl TV.

Fort Dodge Animal Health: 9225 Indian Creek Pkwy. Ste. 400, Overland Park, Kan. 66210/Phone: (913) 664-7000. E. Thomas Corcoran, pres; Brent Standridge, sr VP-sls & mktg; Scott Bormann, VP-sls; Craig Wallace, VP-mktg.

Latorra, Paul & McCann, Syracuse, N.Y. Lou Latorra, pres.

Wyeth Consumer Healthcare: 5 Giralda Farms, Madison, N.J. 07940/Phone: (973) 660-5000. Ulf Wiinberg, pres; Doug Rogers, pres-U.S. Consumer Healthcare; Valerie Caruso, sr VP-GI/topical bus unit; Bob Sanders, sr VP-respiratory bus unit; Andy Davis, sr VP-nutritional bus unit; Kevin Homler, dir-analgesics bus unit; Roger Gravitte, sr VP-sls; Keith Wypyszynski, sr VP-trade relations; Mark Sobray, VP-medical sls & mktg; Steve Palmisano, sr VP-adv dir.

Carrafiello-Diehl Associates, Irvington, N.Y. Nancy Silverman, mgmt super. — Caltrate, Centrum.

CommonHealth, Wayne, Colo. Matt Giegerich, pres & CEO; Nanske Wood, pres-Carbon (a CommonHealth co.). — Advil, managed care.

Grey Worldwide, New York. John Edwards, exec VP & mg ptnr. — Advil, Advil Cold & Sinus, Alavert, Chap Stick, Children's Advil, Preparation-H, Robitussin.

McCann Erickson Worldwide, New York. Greg Fujimoto, sr VP & grp mg dir. — Dimetapp.

TargetCast TCM, New York. Bruce Fagerstrom, sr VP & grp acct dir. — media plng.

Bravo Group, New York. Louis Maldonado, sr VP & mgmt super. — Hispanic adv.

Modem Media, Norwalk, Conn. Tim Smith, VP & dir. — on-line mktg & media.

Wyeth Pharmaceuticals: 500 Arcola Rd., Collegeville, Pa. 19426/Phone: (610) 902-1200. Bernard J. Poussot, pres.

Dorland Global Health Communications, Philadelphia. Harry Sweeney, chmn & CEO; Rita Sweeney, pres & chief operating officer; Richard Minoff, pres-Dorland Pharmaceutical. — institutional care, managed care, pharmaceutical care.

Euro RSCG Life Chelsea, New York. Ed Stapor, pres; Pamela Pinta, exec VP & dir-client svcs; Steve Nothel, grp VP; Michael McNamara, VP & acct super; Nancy Morris, VP & mgmt super; Bob Louer, grp VP. — Effexor Xr, Protonix, Zosyn IV.

Euro RSCG Life LM&P, New York. Carmine Laliberte, pres; Roxanne Mendoza, VP & acct super; Pam Rogers, VP & mgmt super. — FluMist, Meningitec, Prev(e)nar.

Grey Healthcare Group, New York. Lynn O' Conner Vas, CEO; Jeff Boose, chief financial officer. — prof, Premarin, Prempro, ReFacto.

Mueller Wister, Plymouth Meeting, Pa. Kurt Mueller, exec VP; Eric Mueller, VP. — Rapamune.

Saatchi & Saatchi Healthcare, New York. David Marek, exec VP & dir-ops. — Enbrel.

Zenith Media, New York. Marcie Kazdin, sr VP-comms plng. — media plng, Enbrel, Premarin, Prempro.

In-house. Richard Feldheim, pres. — media buying.

Ogilvy Healthworld, New York. Stephen Wray, pres & CEO. — cons awareness adv, Bazedoxifene, Premarin DTC, Premarin VC, Tigecycline.

46 Yum Brands

U.S. ad spending (\$ in thousands)

By media	2004	2003	% chg
Magazine	\$3,295	\$617	434.0
B2B magazine	134	16	737.5
Spanish-language magazine	35	35	0.0
Newspaper	849	826	2.8
National newspaper	NA	73	NA
Spanish-language newspaper	20	11	81.8
FSI	2,980	4,333	-31.2
Network TV	290,424	322,368	-9.9
Spot TV	208,612	197,293	5.7
Syndicated TV	5,305	2,081	154.9
Cable TV network	111,754	99,923	11.8
Spanish-language TV	17,597	14,714	19.6
Network radio	1,967	499	294.2
National spot radio	7,475	8,321	-10.2
Outdoor	5,704	5,711	-0.1
Internet	1,521	717	112.1
Yellow Pages	5,295	7,070	-25.1
Measured media	662,967	664,608	-0.2
Unmeasured media	116,429	88,819	31.1
Total	779,396	753,427	3.4
By brand	2004	2003	% chg
Kentucky Fried Chicken	223,582	232,382	-3.8
Pizza Hut	203,377	188,293	8.0

Special Report

100 LEADING NATIONAL ADVERTISERS SUPPLEMENT

U.S. ad spending (\$ in thousands)

By brand	2004	2003	% chg
Taco Bell	200,905	205,330	-2.2
Long John Silvers	25,374	26,062	-2.6

Sales & earnings (\$ in millions)

Worldwide	2004	2003	% chg
Sales	\$9,011	\$8,380	7.5
Earnings	.740	.617	19.9
U.S.	2004	2003	% chg
Sales	.5,763	5,655	1.9
Division sales	2004	2003	% chg
US company rest.	.5,200	5,100	2.0
International company rest.	.2,800	2,300	21.7

Headquarters

Yum Brands/1441 Gardiner Lane, Louisville, Ky. 40213/Phone: (502) 874-8300.

Personnel, brands, agencies

Corporate: David Novak, chmn & CEO.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Tim Jones, mg ptrn & acct dir. — media svcs.

A&W All American Food: 1900 Colonel Sanders Lane, Louisville, Ky. 40213/Phone: (502) 874-8300. Steve Davis, pres & CEO; Steve Provost, chief mktg officer; Diego Beamonte, chief food innovation officer; Toni Tiedemann, dir-cons insights; Bill Ruby, brand leader; Chris Taylor, field mktg analyst; Paula Ashley-Rogness, dir-media; Michelle Moore, assoc mgr-adv; Dani Reich, adv analyst.

Creative Alliance, Louisville, Ky. Luke Blackburn, VP-acct svcs; Brittanie Mason, acct exec.

Element 79 Partners, Chicago. Jerry Conner, mg dir.

Hoffman York, Milwaukee. John Verre, mg ptrn & acct dir.

Empower MediaMarketing, Cincinnati. Mitchell Dunn, acct super. — natl media buying.

KFC Corp.: 1441 Gardiner Lane, Louisville, Ky. 40213/Phone: (502) 874-8300. Gregg Dedrick, pres & chief concept officer; Scott Bergren, exec VP-mktg; James O'Reilly, VP-natl mktg; Peter Foulds, VP-adv; Ralph Heim, dir-media.

Footo Cone & Belding Worldwide, Chicago. Rahul Roy, sr VP & grp mgmt dir; Tom O'Keefe, exec creative dir.

Mediaedge:cia, New York. Charels Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Tim Jones, mg ptrn & acct dir. — media svcs.

Creative Alliance, Louisville, Ky. Carrie Frazier, VP-acct svcs; Marilyn Nicholson, sr VP-retail print svcs. — print & point-purchase.

Long John Silver's: 1900 Colonel Sanders Lane, Louisville, Ky. 40213/Phone: (502) 874-8300. Steve Davis, pres & CEO; Steve Provost, chief mktg officer; Diego Beamonte, chief food innovation officer; Toni Tiedemann, dir-cons insights; Don Gates, dir-mktg; Paula Ashley-Rogness, dir-media; Michelle Moore, assoc mgr-adv; Dani Reich, adv analyst.

Euro RSCG Worldwide, Dallas. Ray Rosenbaum, chief operating officer; Judy Brooks, sr VP; Christina Clarke, acct dir; Heather Presley, acct exec.

Element 79 Partners, Chicago. Jerry Conner, mg dir.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Tim Jones, mg ptrn & acct dir. — media svcs.

Empower MediaMarketing, Cincinnati. Mitchell Dunn, acct super; Cathy Shaffner, acct super. — natl media buying.

Creative Alliance, Louisville, Ky. Luke Blackburn, VP-acct svcs; Kate Hall, acct super. — natl print creative, natl print & point-of-purchase & merch creative.

Pizza Hut: 14841 Dallas Pkwy., Dallas, Texas 75254/Phone: (972) 338-7700. Peter Hearl, pres & chief concept officer; Tom James, chief mktg officer; Larry Dykstra, VP-cons insights & strategy; Kristen Miller, VP-mktg comms; Linda VanGosen, VP-natl mktg.

BBDO Worldwide, New York. Rick Doerr, VP & acct dir.

Euro RSCG Worldwide, Dallas. Judy Brooks, sr VP-client svcs.

TracyLocke, Dallas. Ed Winter, CEO; Todd Nonken, grp acct dir.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Tim Jones, mg ptrn & acct dir. — media svcs.

Dieste, Harmel & Partners, Dallas. Salma Gottfried, exec dir. — Hispanic adv.

Taco Bell: 17901 Von Karman, Irvine, Calif. 92614/Phone: (949) 863-4500. Emil Brolick, pres & chief concept officer; Greg Creed, chief mktg officer; Debbie Myers, VP-media svcs & entertainment.

Footo Cone & Belding Worldwide, San Francisco. Richard Cran, sr VP & acct dir.

Mediaedge:cia, New York. Charles Courtier, exec chmn ww; Lee Doyle, mg ptrn & client svcs dir; Tim Jones, mg ptrn & acct dir. — media svcs.

Initiative Media Worldwide, New York. Larry Orell, exec VP & gm. — local bdcst buying.

Dieste, Harmel & Partners, Irvine, Calif. Yolanda Cassity, gm. — Hispanic adv.