

## Instant Insights: The Media/Agency Landscape

An ongoing discussion - not to mention a point of vigorous debate - is just how many agencies exist in the United States versus the number of media outlets who want to work with those agencies, from advertising to mail to public relations. A number of people and companies have looked over the years at individual data points, but we wanted to put together a comprehensive landscape for you using data from the Bureau of Labor Statistics over a decade.

Let's look at the media side first:

Media Landscape	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	10 Year Change
Avg. Book Publishers	73.0	72.6	70.9	68.3	65.1	64.0	62.2	60.4	59.9	59.4	-18.6%
Avg. Cable Broadcasting	80.7	73.8	73.3	69.0	62.7	59.4	54.0	52.7	53.5	54.0	-33.0%
Avg. Internet Publishing	91.9	109.6	125.3	142.4	163.1	184.2	203.3	223.8	244.4	259.7	182.5%
Avg. Magazine Publishers	116.3	113.1	110.4	107.4	103.0	99.7	97.3	92.2	87.6	86.0	-26.1%
Avg. Mailinglist Publishers	55.5	50.6	46.3	44.1	41.1	37.5	35.3	33.4	30.5	28.6	-48.5%
Avg. Newspaper Publishers	253.7	240.9	224.7	213.2	202.1	190.7	176.7	161.4	146.7	138.1	-45.6%
Avg. Other Info Services	49.7	50.5	52.1	53.9	55.7	57.2	58.9	62.0	63.4	64.1	29.1%
Avg. Radio Broadcasting	92.6	92.7	90.9	90.3	89.7	86.9	84.9	83.3	82.3	81.6	-11.9%
Avg. Television Broadcasting	117.3	116.9	120.7	124.4	130.3	130.3	131.7	132.0	134.3	134.4	14.5%
<b>Totals</b>	<b>930.6</b>	<b>920.6</b>	<b>914.4</b>	<b>913.0</b>	<b>912.8</b>	<b>909.9</b>	<b>904.3</b>	<b>901.1</b>	<b>902.5</b>	<b>905.9</b>	<b>-2.7%</b>

What we see is the media landscape has contracted slightly, mainly driven by a decline in newspaper, magazine, and mailing list publishers, but offset by Internet publishers. Overall, the media landscape employs ~905,900 people in America.

Now the agency side:

Agency Landscape	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	10 Year Change
Avg. Ad Agencies	166.1	172.8	180.3	185.5	188.5	195.4	201.0	202.2	205.2	204.7	23.2%
Avg. Ad Distribution Agencies	76.9	78.2	81.7	91.6	106.3	107.3	108.7	108.5	108.0	109.2	42.1%
Avg. Direct Mail Ad Agencies	50.8	51.1	48.6	47.3	47.2	46.1	44.6	44.0	41.5	40.0	-21.3%
Avg. Display Ad Agencies	30.9	33.6	32.9	35.4	37.4	36.8	37.8	37.7	37.1	37.6	21.7%
Avg. Market Research Firms	102.1	103.9	106.7	104.1	101.0	98.6	98.4	92.6	89.6	86.9	-14.9%
Avg. Media Buying Agencies	36.6	38.8	40.3	40.5	40.4	41.2	41.4	40.3	37.5	36.0	-1.5%
Avg. Pr Agencies	48.3	49.9	52.1	53.7	55.3	57.3	59.1	57.9	60.5	62.5	29.5%
<b>Totals</b>	<b>511.6</b>	<b>528.4</b>	<b>542.6</b>	<b>558.1</b>	<b>576.1</b>	<b>582.6</b>	<b>591.0</b>	<b>583.2</b>	<b>579.3</b>	<b>576.9</b>	<b>12.8%</b>

We see the agency world has grown by 12.8% over the decade, mostly in the ad business and PR agencies. Direct mail and market research have declined.

The number of people who work in publishing media of some kind is also underestimated; these numbers are for formal companies employing people. Individuals such as influencers, bloggers, and social media personalities would not be included in any of these numbers unless they are formally incorporated and report data to BLS via the IRS.

Data source: data extracted from BLS.gov on July 23, 2019.