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Conversation with Olivier Gauthier, founder and CEO of COMvergence

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In the past year or two, the data provided by **COMvergence** has continuously appeared in industry information and reports. At the beginning of 2019, **GroupM, a global media investment management group under WPP Dabang Group, announced that it will use COMvergence's operational and business development analysis reports.** As a benchmark, the two parties have reached global cooperation.

As we all know, the advertising spending data in the marketing industry, the business scale of the advertising group and business changes directly affect the global competitiveness of each specific company, and even relate to the professional development of each marketing person. Therefore, obtaining objective and transparent business contract amount and market share data is a necessary requirement for us to fully understand the development of the industry.

So what kind of company is COMvergence? What kind of methodology and algorithm is used to achieve the measurement of advertising costs? Madison State interviewed Olivier Gauthier, the founder and CEO of COMvergence, and he also gave us a detailed introduction to COMvergence, and provided his own views and opinions on data sources and measurement methods and industry trends.



Olivier Gauthier, founder and CEO of COMvergence

Madison: Could you briefly introduce COMvergence, in which countries and regions does the business develop and what does the business cover?

Olivier Gauthier: COMvergence was founded in 2016 and is headquartered in Paris, France. It is currently the only global independent market research organization that can target the creative, digital, creative, digital, and global advertising communication groups, leading independent agency companies, and management and IT consulting companies. Media agencies conduct comprehensive analysis and benchmarking studies.

COMvergence can provide high-quality analysis and insight products and services to advertisers, agencies, comparison consulting organizations, media suppliers, technology companies and financial analysis companies, and has a simple and convenient user operation experience. Our principles of operation are objectivity (a strict measurement standard to measure the operational effectiveness of agencies and advertising groups), transparency (transparency and fairness of research methods), and agility (our

products have an online user interface to facilitate our data collection , Can be displayed flexibly with charts and figures, easy to operate).

In addition, benefiting from the strategic partnership with Kantar and Nielsen, we are able to obtain data from third parties in a fair and equitable manner and provide data analysis and estimation without relying on the data intelligence provided by each company.

At the same time, we are also working closely with the Groupe Group's data and intelligence department to make more scientific estimates of advertising expenditures. As the founder and CEO of COMvergence, I am often invited to publish some opinions and views on the entire marketing industry at conferences organized by some agency companies or industry organizations.

Madison: How does COMvergence work with agents around the world? How do you do business in China?

Olivier Gauthier: At present, the research data of media agents provided by COMvergence covers 45 countries. This is due to our close partnership with all international and independent agents in these countries. Every quarter, they provide our research team with accurate business changes and comparison information.

In China, we are in contact with all international advertising groups and we will visit at least once a year. There are also many business partners, such as Ebiquity, CTR and iResearch.

Madison State: Now that the Internet giants have established increasingly tight walled gardens, does COMvergence cooperate with Internet giants?

Olivier Gauthier: There is no cooperation with Internet companies at present, but we are also actively fighting for it. I believe we will have such opportunities in the future.

Madison: How does COMvergence ensure that the data collection in China is more relevant to the actual cost of advertisers, what tools and algorithms are used to measure the expenditure of Chinese advertisers?

Olivier Gauthier: In China, there are three main sources of our data: 1, CTR, which can provide traditional media data other than outdoor advertising; 2, CODC outdoor advertising research, which can provide outdoor advertising data; 3, iResearch , Can provide digital advertising data.

For now, on the basis of applying the deflator index to each media, our estimated figures come from the integration of the above three.

But this year we will also optimize our data estimation capabilities. We have new data sources that can supplement the cost of digital media that was not previously monitored by iResearch. In addition, in the past year and a half, we have also been experimenting with a stable calculation model and conducted pilot experiments in multiple markets. At the same time, we are also discussing with the Chinese agency on the current estimates. After obtaining their feedback, we will launch the 2019 annual contract and ranking report.

Madison: At the beginning of 2020, major advertising groups have released annual financial reports. Overall, the data performance is still not optimistic enough. Is the main reason for this result still the global economic recession?

Olivier Gauthier: From a global perspective, in the past three to four years, all large advertising groups are facing severe challenges. We believe that the main reasons are:

- Since 2015, almost 25 billion to 30 billion US dollars of media business has to be re-reviewed each year - the trend of advertisers in-house dealing with creative and media business continues to expand
- the transparency and trust of programmatic advertising continues to face challenges

- Some breakouts have emerged in the industry, such as S4 Capital, Accenture Interactive, You & Mr Jones, etc.
- The service capabilities that advertising companies are required to provide develop towards a complex trend, so companies like Dabang Group and Publicis Group have conducted Merger and integration

Madison: In 2019, WPP Group has undergone major changes from structure to leadership. Will these reforms and adjustments show a positive effect in 2020?

Olivier Gauthier: There is no doubt that Dabang Group is still the world's largest advertising communications group. In the past two years, Sir Su Mingtian resigned, and the new head Mark Read undertook a series of compact reorganizations and reforms, especially in the field of creativity and media. In addition, there are many excellent senior talents joining. I believe that now Dabang can provide more stable and powerful services.

Madison: How do you think about the performance of Dentsu Aegis, Publicis Group and Apex Group last year?

Olivier Gauthier: Indeed, last year, the entire Dentsu Aegis Group suffered a severe management crisis, which caused a heavy hit to its performance, especially in the Asia-Pacific region, and many former Aegis Group executives have also left. Therefore, for Dentsu Aegis, from the global to the regional to the country, the stability of the leadership team is an urgent matter to be resolved.

And despite the fact that the Apex Group had the highest endogenous growth rate among the top advertising groups last year, we believe that the island effect within their group is still very large. And Publicis Group, "the power of unity" has given them a lot of positive drive to win new business, but it can also be seen from the performance of the financial report, it is still mixed.

Madison State: New marketing companies and MarTech technologies are constantly impacting the traditional advertising group model. For example, emerging forces represented by S4 Capital and Accenture Interactive are constantly acquiring new companies around the world. Such new marketing technology companies Is it the future of the industry?

Olivier Gauthier: In fact, we must have a lot of conjectures about the changes in the industry. For example, for S4 Capital, we really want to know what will happen if Sir Martin Sorrell retires one day, and if this day comes, I will not be surprised even if S4 Capital is acquired. And Accenture is indeed a company that needs attention. Assuming that Accenture has enough financial power to buy an advertising group, will it merge? At the same time, we should not ignore the five major technology companies (Facebook, Amazon, Apple, Netflix and Google's parent company Alphabet), they are also important forces in this industry. So, what will happen in the future is indeed full of great uncertainty. Let us wait and see.

对话 COMvergence 创始人兼 CEO Olivier Gauthier

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近一两年，COMvergence 所提供的数据开始不断出现在行业资讯与报告中，而 2019 年年初，WPP 达邦集团旗下全球媒介投资管理集团群邑更是宣布将启用 COMvergence 的经营和业务发展分析报告作为基准，双方在全球范围内达成合作。

众所周知，营销行业中的广告花费数据、广告集团的经营规模以及业务变更等信息都直接影响到每一家具体公司的全球竞争力水平，甚至关乎每一位营销人的职业发展。所以获取客观而透明的业务承揽额以及市场份额数据是我们对行业发展进行全面认知的必要需求。

那么 COMvergence 到底是一家怎样的公司？又是采用什么样的方法论和算法来达成对广告花费的测量的？麦迪逊邦采访到了 COMvergence 的创始人兼首席执行官 **Olivier Gauthier**，而他也为我们详细介绍了 COMvergence，并针对数据来源与测量方法以及行业发展趋势等提供了自己的观点和看法。



COMvergence 的创始人兼首席执行官 Olivier Gauthier

麦迪逊邦：可否简单介绍一下 COMvergence，在哪些国家和地区有业务开展，业务所涵盖范围有哪些？

Olivier Gauthier：COMvergence 成立于 2016 年，总部设在法国巴黎，是目前唯一一家全球独立的市场研究机构，能针对全球广告传播集团、领先的独立代理公司以及管理和 IT 咨询公司旗下的创意、数字、媒介代理商进行全面的分析及衡量基准研究。

COMvergence 可以向广告主、代理商、比稿咨询机构、媒体供应商、技术公司以及金融分析公司提供高质量的分析、洞察产品及服务，并且具有简单方便的用户操作体验。我们的行事原则为客观性（以严格的测量标准来衡量代理商以及广告集团的运营效果）、透明性（研究方法透明公正）以及敏捷性（我们的产品拥有在线的操作界面，方便我们收集数据，更能以图表和数字进行灵活展现，便于操作）。

此外，受益于同凯度和尼尔森的战略合作关系，我们得以公平公正的从第三方获取数据并提供数据分析和预估，而不用仰赖每家公司自己提供的数据情报。

同时，我们也在和群邑集团的数据和情报部门紧密协作，对广告支出做出更科学的预估。作为 COMvergence 的创始人兼 CEO，我也经常会被邀请到一些代理公司或者行业组织所举办的会议活动中发表一些针对整个市场营销行业的观点和看法。

麦迪逊邦：COMvergence 是如何同各地的代理商展开合作的？在中国又是如何开展业务的？

Olivier Gauthier：当下，COMvergence 所提供的媒介代理商的研究数据覆盖 45 个国家，这得益于在这些国家中，我们与所有国际及独立代理商之间亲密的合作伙伴关系。他们每个季度都会向我们的调研团队提供准确的业务变更和比稿信息。

在中国，我们与所有的国际广告集团都有联系，我们至少一年会巡访一次。同时也有很多商业合作伙伴，比如，Ebiquity、CTR 以及艾瑞咨询。

麦迪逊邦：当下互联网巨头建立起了越来越严密的围墙花园，对于 COMvergence 来说，是否有同互联网巨头展开合作？

Olivier Gauthier：目前还未同互联网公司合作，不过我们也在积极争取中，相信未来我们一定会有这样的机会。

麦迪逊邦：COMvergence 如何保证在中国的数据采集更贴合广告主的实际花费，是用什么样的工具和算法来衡量中国广告主的支出的？

Olivier Gauthier：在中国，我们数据的主要来源有三部分：1，是 CTR，可以提供除户外广告以外的传统媒介数据；2，是 CODC 户外广告研究，可以提供户外广告的数据；3 是艾瑞咨询，可以提供数字广告的数据。

目前来说，在对每家媒体应用平减指数的基础上，我们的预估数字便来源于以上三处的整合。

不过今年我们也会优化我们的数据估算能力，我们有新的数据来源可以补充之前艾瑞所监测不到的数字媒体花费部分。此外，在过去的一年半中，我们也一直在试验一种稳定的计算模型，并在多个市场进行了试点实验。同时，我们也正与中国的代理公司针对目前的估算数字展开讨论，在获得他们的反馈后，我们便会推出 2019 年的年度承揽量和排名报告。

麦迪逊邦：2020 年年初，各大广告集团纷纷发布年度财报，整体上看，数据表现仍然不够乐观，造成该结果的原因是否仍主要为全球经济的衰退？

Olivier Gauthier：从全球范围看，在过去的三到四年中，所有的大型广告集团都在面临着严峻的挑战，我们认为主要原因有：

- 自 2015 年以来，每年差不多有 250 亿到 300 亿美元的媒介业务要重新比稿
- 广告主 in-house 处理创意和媒介业务的趋势不断扩大
- 程序化广告的透明度和信任度不断面临挑战
- 行业中出现了一些破局者，比如 S4 Capital、埃森哲互动、You&Mr Jones 等
- 广告公司被要求提供的服务能力朝着复合型的趋势发展，所以像达邦集团、阳狮集团纷纷对旗下的公司进行了合并与整合

麦迪逊邦：2019年，WPP集团从架构到领导层都经历了大变动，这些改革和调整会在2020年体现出积极的作用吗？

Olivier Gauthier：毫无疑问，达邦集团仍然是全球最大的广告传播集团。在过去两年中，苏铭天爵士卸任，新掌门 Mark Read 上任后进行了一系列紧凑的重组与改革，特别是在创意与媒介领域。加之又有很多优秀的高级人才加入，我相信，现在整个达邦可以提供更稳定更强大的服务。

麦迪逊邦：如何看待电通安吉斯、阳狮集团和埃培智集团在去年的财报表现？

Olivier Gauthier：确实，在去年，整个电通安吉斯集团都遭遇了严重的管理危机，这给业绩带来了重创，特别是在亚太区，而很多前安吉斯集团的高层也纷纷离职。所以，目前对电通安吉斯来说，从全球到区域再到国家，领导团队的稳定是亟待解决的当务之急。

而尽管埃培智集团在去年可以说是拥有前几大广告集团中最高的内生增长率，但我们认为，他们集团内部的孤岛效应还是很大。而阳狮集团，“合一的力量”给了他们不少赢取新业务的正面驱动，不过从财报表现中也可看出，还是喜忧参半吧。

麦迪逊邦：新型的营销公司以及 MarTech 技术在不断冲击着传统的广告集团模式，比如以 S4 Capital、埃森哲互动为代表的新兴力量正在全球范围内不断并购初创公司，这类新型的营销技术公司是否是行业的未来？

Olivier Gauthier：其实对于接下来行业的格局变化，我们肯定会有很多猜想。比如，对 S4 Capital 来说，我们其实非常想知道，如果有一天苏铭天爵士退休了会发生什么，如果这一天来到了，哪怕 S4 Capital 被收购，我也不会感到惊讶。而埃森哲确实是个需要关注的公司，假设埃森哲拥有了足以买下一家广告集团的财力，它是否会进行吞并？同时，我们也不要忽视五大科技公司（Facebook、亚马逊、苹果、奈飞和谷歌的母公司 Alphabet），他们也是这个行业中的重要力量。所以，未来会如何，确实充满了极强的不确定性，我们拭目以待吧。