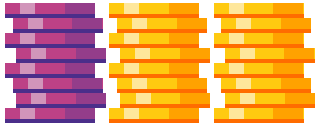


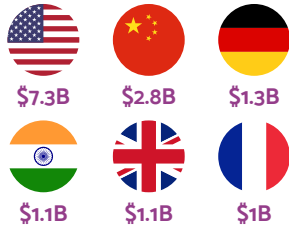
KEY FINDINGS AND INSIGHTS FROM CONVERGENCE
FY 2020 MEDIA NEW BUSINESS BAROMETER STUDY



\$22.2B

REVIEWED GLOBALLY IN 2020

2/3 of the total volume concentrated in six countries



Agencies set up bespoke units to serve:

- Heineken (global),
- Henkel (Germany),
- Sanofi (global),
- Unilever (China)

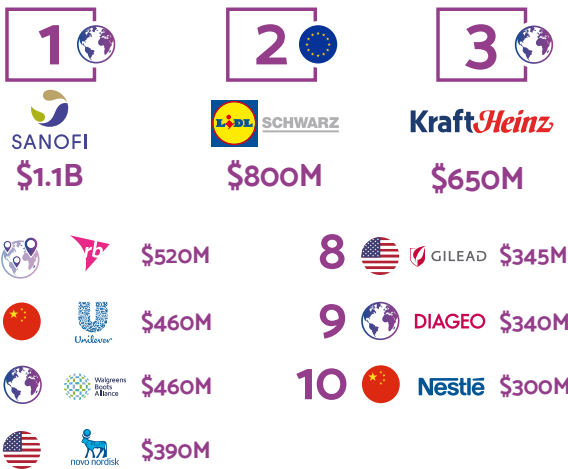


90% assigned to **BIG 6** 10% assigned to independent agencies



Total volume reviewed **-18%** VS 2019

TOP PITCHES & MOVES



FY 2020 NBB GLOBAL RANKINGS

AGENCY NETWORKS

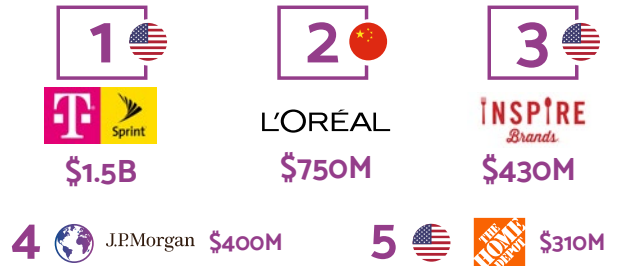
- 1 MEDIACOM** +\$1.2B of new client wins
- 2 Wavemaker** +\$0.9B of new client wins
- 3 havas media** \$1B of retained billings

MEDIA AGENCY GROUPS

- 1 groupm** +\$2.9B of new client wins
- 2 dentsu international** +\$1.1B of new client wins
- 3 PUBLICIS MEDIA** \$1.8B of retained billings

MEDIA PITCHES & REVIEWS 2021
\$10B IN PLAY ALREADY

TOP 5 CONCLUDED PITCHES in Jan/Feb (\$3.4B)



TOP 5 ONGOING REVIEWS (>\$7B)



FOR DETAILS ON ALL OUR PRODUCTS AND SERVICES

www.comvergence.net

OR FEEL FREE TO CONTACT US

Olivier Gauthier, Founder & CEO: Olivier.Gauthier@comvergence.net

Lisa Spielman, US Director: Lisa.Spielman@comvergence.net

COMvergence worldwide

COMvergence is an independent and international research consultancy providing analysis and benchmarking studies of the advertising and media firms owned by the global holding companies, leading independent agencies, and management & IT consulting firms. Using quantitative and qualitative measurement metrics, COMvergence provides high-quality reference data, guidance and support for MarCom professionals across all levels and titles. COMvergence partners include the American Association of Advertising Agencies (4A's), World Federation of Advertisers (WFA), Nielsen and Kantar, among others.