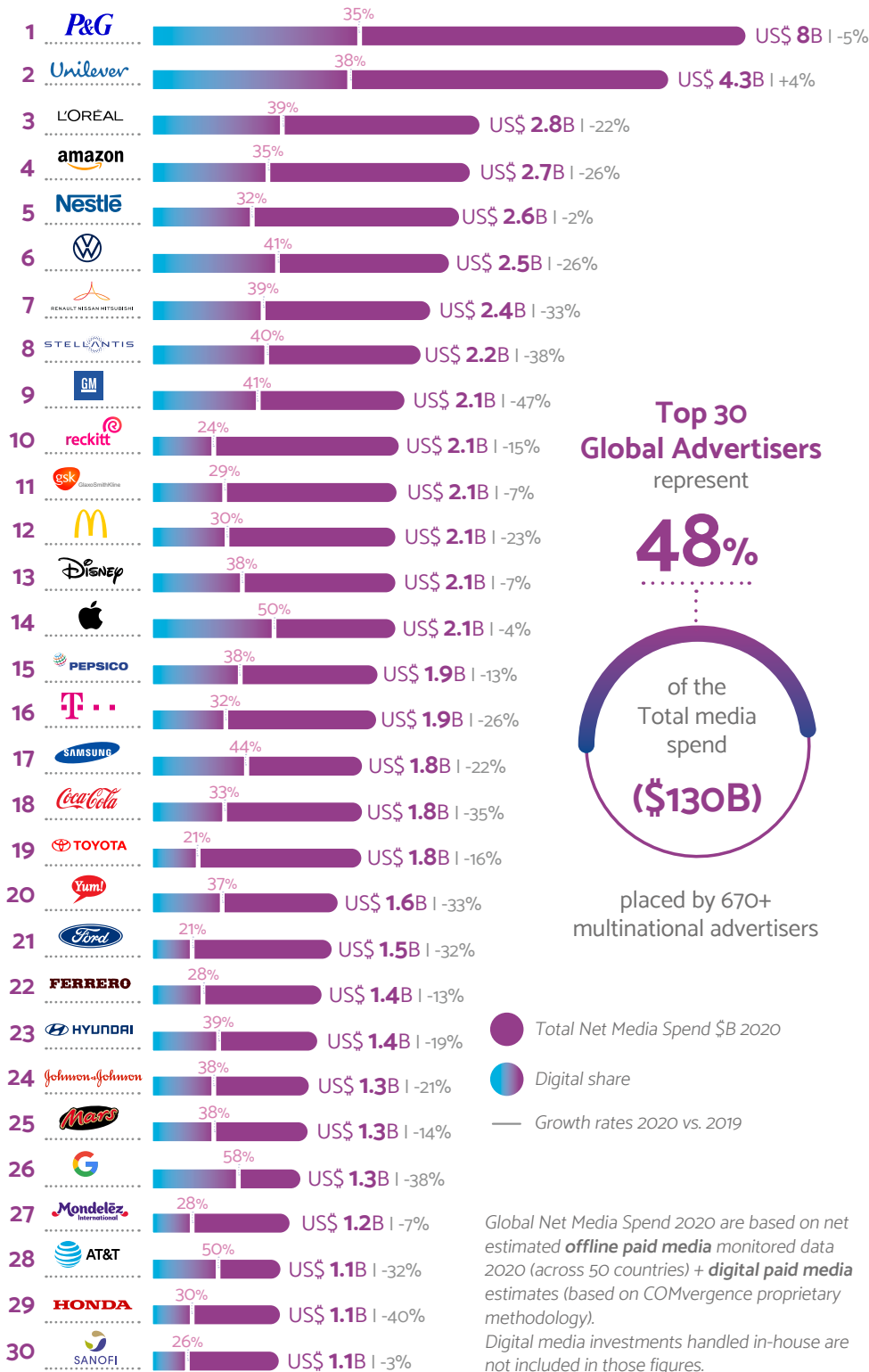
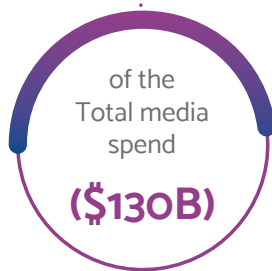


TOP 30 GLOBAL ADVERTISERS 2020



Top 30 Global Advertisers represent

48%



placed by 670+ multinational advertisers

● Total Net Media Spend \$B 2020
 ● Digital share
 — Growth rates 2020 vs. 2019

Global Net Media Spend 2020 are based on net estimated **offline paid media** monitored data 2020 (across 50 countries) + **digital paid media** estimates (based on COMvergence proprietary methodology). Digital media investments handled in-house are not included in those figures.



Each of the Top 30 Intl. Marketers spent more than

\$1B

in 2020 (through their media agencies)



The share of digital (out of the total media mix) varies between:

21% and 58%



Media spend **declined** on average by

-21% (vs. 2019)

among the Top 30 Global Advertisers.



FMCG (food & soft drinks) and **pharmaceutical** categories have been the **least impacted** by the pandemic in 2020.

By contrast, advertisers from the **Automotive, Retail/Restaurants** and **Media & Entertainment** have considerably reduced their media investments (vs. 2019).



Our members and partners unanimously agreed that COMvergence has become one of the main (if not the only) reliable source of advertiser media spend in the market.

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.

IF YOU HAVE ANY QUESTIONS OR WOULD LIKE TO RECEIVE ANY FURTHER DETAILS, PLEASE CONTACT US.

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COMvergence worldwide