



MEDIA AGENCY NETWORKS












TOP 5 PITCHES

COMvergence has assessed about US\$ 20B of media spend reviewed during the year 2020 – of which US\$ 6B described below:

		WINNER(S)	MAIN INCUMBENT AGENCY(IES)	PITCH CONSULTANT
GLOBAL	SANOFI  \$1.1B	 havas media (US)  (rest of the world)	 havas media (US)  (rest of the world)	 MediaSense
	KraftHeinz \$700M	 Starcom (US)  (rest of the world)	 Starcom	 MediaSense
	DIAGEO \$350M	 phd  OMG	 CARAT	 MediaSense
	 Walgreens Boots Alliance \$350M	 MEDIACOM  WPP	 MEDIACOM (Team WBA)	 MEDIALINK
	 Hagberg \$250M	 MEDIACOM	 OMD	-
MULTI-MARKET	 LIDL Europe \$850M	 Starcom  Wavemaker  havas media  OMD	 Starcom  Wavemaker  havas media  OMD  ADVISE media consulting	
	SEPHORA North America \$150M	 Digitas	Various	 ID COMMS
	 weightwatchers North America \$100M	 MINDSHARE	 horizonmedia	 MEDIALINK
	 HONDA EMEA \$75M	 UM	 dentsu X (HDME)	 MediaSense
	 Intersnack EMEA \$65M	 Starcom	 dentsu  MEDIABRANDS  APERTO ONE	
LOCAL	Unilever China \$575M	 groupm	 phd	-
	 SAMSUNG USA \$550M	 Starcom  Digitas	 Starcom  Digitas  R3 WORLDWIDE	
	 novo nordisk USA \$400M	 Wavemaker	 SPARK	-
	 GILEAD USA \$350M	 Initiative	 PUBLICIS HEALTH MEDIA  horizonmedia	-
	 THE CLOROX COMPANY USA \$300M	 OMD	 OMD  AKQA	-

COMvergence's net media spend estimates are based on net offline spend (sourced from Nielsen / Kantar) + digital media spend estimates (sourced from COMvergence's proprietary methodology)

MAJOR DEVELOPMENTS ACHIEVEMENTS

-  **ARENA MEDIA** named Agency of the Year in Spain by the Spanish Association of Advertisers, with more than 17 awards and 52 shortlists for its campaigns. Named Agency of the Year in Branded Content by the latest Content Scopen study.
-  **CARAT** has been recognised as a Global Media Agency leader by Forrester, featuring its human centred approach, "Designing for People". This new model has delivered business impact for new clients such as KraftHeinz, Pandora and Velux.
-  **dentsu X** continued its ascendancy that has seen it recognized as the fastest growing global agency two years in a row. Award wins increased 175% year-on-year for work including Heineken, JLR and Square, while Nestle joined dentsu X's roster.
-  **Digitas** has unleashed a powerful new business engine and a culture of growth, resulting in a win rate of over 70% and 28 new clients in the US. Gartner Magic Quadrant for Global Marketing Agencies: Named «Leader» in 2020, 5th consecutive year.
-  **essence** had a successful year growing its list of client partners to include Zoopla, Scoot, Jeep Sainsbury's & ITV. 2020 also saw Essence expand its footprint into Brazil.
-  **havas media** First agency to join Prebid.org, an organization to promote transparent header bidding across the ad industry. Best collaborative team in US, Leader in NB in LATAM, Agency of the Year in Colombia by El Dorado Awards, Agency of the Year in Argentina by the Jerry Goldemberg Awards, Agency of the Year in Singapore by Campaign, Agency of the Year in China by the 4A.
-  **Initiative** was awarded Ad Age's Best Place To Work, picked up a range of new clients including Gilead, Salesforce, Citrix, Unilever and Deliveroo. Also has been appointed T-Mobile US (\$2B) media account in early Jan. 2021.
-  **iProspect** Amanda Morrissey was appointed Global Brand President with a focus to create an end-to-end future-forward media and performance agency through the integration of iProspect and Vizeum. The integration will define a new territory of performance-driven brand building by delivering digital-first media strategies. Clients wins throughout 2020 include Cox, Red Bull, Swatch and Zalando.
-  **vizeum** Navigating uncertainty, winning new clients in every region and delivering award-winning work. m/SIX appointed Belinda Smith as CEO of NA/ Americas, who continues to work as Special Advisor to the board, as well as Global Diversity Ambassador for the WFA.
-  **m/SIX** became Uber's global agency of record. This was achieved without a pitch and through a strong relationship on the offline business in the US that grew to add on US online business & all markets globally. Festival of Media Global Awards: Global Media Network of the Year 2020. Eurobest: Media Network of the Year 2020.
-  **MEDIACOM** launched the world's first LGBTQ "Inclusion PMP" tackling the issue of defunding of community journalism via algorithmic buying. Launched the Black "Inclusion" PMP, amplifying Black stories and voices across journalism and the arts to drive real inclusivity in media. #1 Agency Network in the WARC Media 100.
-  **MINDSHARE** promise to deliver better decisions, faster was further strengthened by the introduction of the Fast Start Suite - a suite of analytical, thought leadership and strategic products. Adweek Global Media Agency of the Year 2020.
-  **OMD** added 150 new business wins, including the win and (remote) transition of the global Diageo account. Also its Thought-leader publication Overthrow II has seen over 12,000 copies of the book. Network of the Year: M&M Global Awards.
-  **phd** Delivering on Publicis Groupe's "Power of One" positioning, Spark won pitches in conjunction with other Groupe agencies (incl. Vanguard in the U.S., Mondelez Production in EU and Pierre Fabre in France).
-  **SPARK** was named #1 Global Media Agency (WARC) and a Leader in the 2020 Forrester Global Media Agency Wave report. The agency harnessed the power of its Human Experience Company positioning, uncovering data-led insights and unlocking growth for clients.
-  **Starcom** won Adweek's US Media Agency of the Year, Campaign's APAC Media Network of the Year, EMEA Agency of the Year; named a Leader in Forrester's Global Media Agencies Report; and added several new clients, Emirates, Doc Martens, Mercado Libre, Lazada and Foodpanda.
-  **UM** named as the world's best performing media agency (COMvergence NBB Q1-Q3 2020), Wavemaker revealed a new Global Operating System, modular Planning Process and a brand refresh, all designed to bring the new positioning of Positive Provocation to life.
-  **Wavemaker** won the global media business for TikTok and expanded the Publicis Imagine relationship to include Hulu in the US. Zenith also launched its ROI Growth Platform, a data- and analytics-led approach to planning sales ROI for clients. Zenith UK won Campaign's Agency of the Year.
-  **Zenith**

DEPARTURES OF GLOBAL HEADS

 **MEDIACOM**
STEPHEN ALLAN Global CEO

 **MINDSHARE**
NICK EMERY Global CEO

 **CARAT**
CHRISTINE REMOVILLE Global President

APPOINTMENTS OF GLOBAL HEADS

 **MEDIACOM**
NICK LAWSON Global CEO
JOSH KRICHEFSKI Global COO

 **MINDSHARE**
ADAM GERHART Global CEO

 **MERKLE**
CRAIG DEMPSTER Global CEO

 **Performics**
PAUL TIBBITT Global CEO



MEDIA AGENCY GROUPS/HOLDINGS

HEADCOUNT AND BILLINGS

 106,000 employees 36,000 \$63B	 80,000 employees 22,000 \$39.5B	 70,000 employees 20,100 \$38.4B	 66,400 employees 48,750 \$30.8B	 Interpublic Group 54,300 employees 13,000 \$21B	 20,000 employees 9,450 \$10.7B
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* Final 2019 Global Billings figures were released by COMvergence in June 2020.

47 MARCOM AGENCY ACQUISITIONS

 7 (7 in 2019) including CreativeDrive (700 staff)	 4 (12 in 2019) including Media Storm (167 staff)	 1 (1 in 2019) Collectively (70 staff)
 6 (7 in 2019) including Circus (350 staff)	 3 (6 in 2019) including Cicero/AMO (70 staff)	 1 (0 in 2019) Zilker Technology (360 staff)
 6 (2 in 2019) including Growww Media (715 staff)	 3 (6 in 2019) including Sapient.i7 (50 staff)	 Interpublic Group 1 (0 in 2019) Synergy Creative (40 staff)
 5 (1 in 2019) including Velvet Consulting (180 staff)	 2 (1 in 2019) including Spatial Access (30 staff)	 1 (2 in 2019) Max & Partners (4 staff)
 4 (0 in 2019) including RXP group (550 staff)	 2 (2 in 2019) including Reamp (90 staff)	 1 (0 in 2019) Point of Origin (1,200 staff)

No acquisitions recorded for IBM iX and M&C Saatchi in 2020

DEPARTURES OF GLOBAL / REGIONAL HEADS

MICHAEL ROTH Global CEO
Interpublic Group

APPOINTMENTS OF GLOBAL / REGIONAL HEADS

PHILIPPE KRAKOWSKY
Global CEO
WENDY CLARK
Global CEO
JACKI KELLEY
Americas CEO
THOMAS LE THIERRY
EMEA CEO (MEDIA SERVICES)
HERMON GHERMAY
Global Chief Culture Officer

JASON DORMIEUX
Global Chief Data & Tech. officer
KIRK MCDONALD
N.A. CEO
DEMET İKILER
EMEA CEO
ASHUTOSH SRIVASTAVA
APAC CEO
JUSTIN BILLINGSLEY
Global CMO

MAJOR DEVELOPMENTS / ACHIEVEMENTS

landed the top spot among the Big 6 media agency groups in COMvergence 2020 NBB study. Announcement of the Multicultural Marketplace in the US. Creation of GroupM Data & Technology, formally [m]PLATFORM. Recognized by the Top Employers Institute as a Top Employer 2020 in Spain, Germany and the U.K.

With the introduction of The Pact, powered by Epsilon, Publicis Media provided clients with outcomes-based solutions allowing them to be nimble, flexible and resilient now and in the future. The acceleration of Marcel also brought greater connectivity and talent-at-scale for clients.

holistic operating platform, Omni, saw continued evolution through innovation, strengthening OMG's data-led approach. The group expanded its commerce and content offering in APAC with the launch of OMG Transact, Drum, and Fuse.

Dentsu Aegis Network re-branded to dentsu international, winning several new clients, and significantly expanding many existing client relationships including KraftHeinz, American Express and Heineken. In September Wendy Clark joined as Global CEO. The Group was named US Holding company of the Year by Mediapost.

adopted 10 Media Responsibility Principles to hold digital platforms accountable to a set of common standards globally, hired a Global Chief Culture Officer to accelerate Diversity, Equity and Inclusion actions and strengthened their global capabilities in eCommerce with Reprise Commerce and in Content with the Mediabrands Content Studio led by Brendan Gaul.

became the first global holding company to join the Conscious Advertising Network. Launch of the Social Equity Marketplace, the first-of-its-kind, designed for brands to reach and invest in BIPOC, LGBTQ+, sustainable and women-owned businesses. Launch of Havas Market, a strategic full-service eCommerce offering.