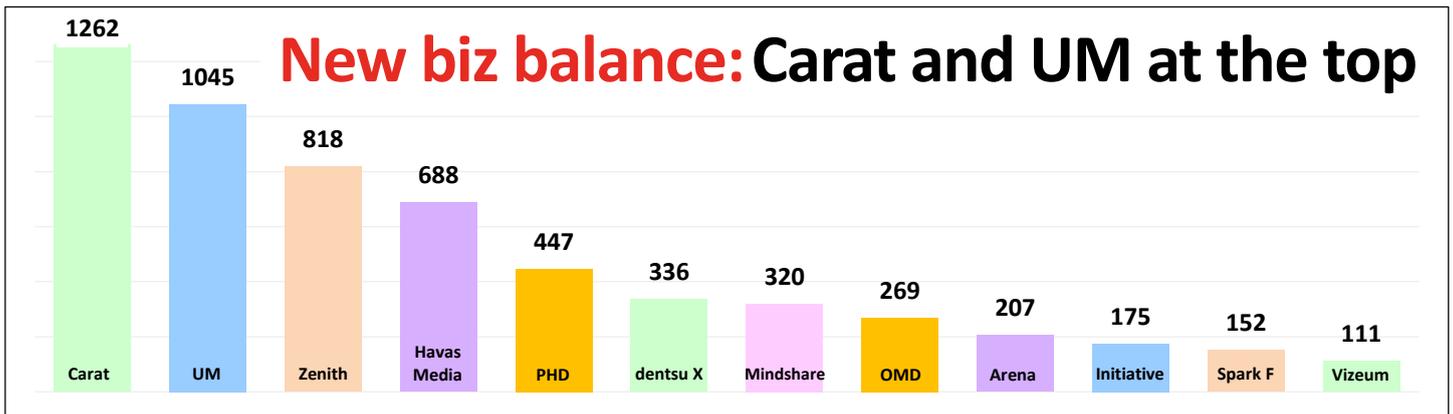


All numbers are in \$ million



New biz balance 2019 by media agency network (in adspends 2018) is defined by the total of wins versus departures, **not taking into account retentions**. Perimeter: **62 countries**. Global and regional account moves + local ones above \$ 10 million.

Metric: monitored adspends with few exceptions including non-tradi spends.
Networks not shown on the chart :
 • **Essence/** GroupM: \$m 105;
 • **m/SIX /** GroupM: balance is zero;
 • **Starcom/** Publicis balance is zero;

• **MediaCom /** GroupM: a negative balance of \$m -120;
 • **Blue 449/** Publicis Media: \$m -403;
 • **Wavemaker/** GroupM: \$m -790;
 • **Hearts & Science /** OMG: minus \$m -1642 (departure of P&G USA and Canada).

At the end of December, how was the agency balance between account wins and departures?

n°1: Carat won the New Biz Balance competition 2019 thanks to its win of a large part of P&G USA in January from Hearts & Science (\$m 1545) and to a much lesser extend Vodafone (\$m573). Carat’s balance is positive, offsetting the departures of Ferrero in China, GSK- Pfizer consumer brands, Chevy LMA and Disney Parks in the USA.

n°2: UM won Nestlé in Mexico, Poland, Spain, etc; Mattel globally except USA; won Energizer, Levi’s, TGI Fridays, in the USA.

n°3: Zenith won \$m 820 of the Disney Group accounts, to be managed by Team Imagine. We have added Hero India managed by Team HMC and GSK by Platform GSK.

n°4: Havas Media won Trip Advisor; Sanofi extension in the USA; Danone Indonesia. Departure of Axa; LG Elec

n°5: PHD won LG Electronics, Aldi in Germany; Shanghai VW auto, partly, in China. Departures of Ferrero in the USA and in 11 countries; Huawei in China.

n°6: dentsu X won Upfield, Nestlé in Russia and Italy; Ahold in Netherlands. Departure of Shanghai VW in China.

n°7: Mindshare won Allergan and Ferrero in the USA and four countries. Win of Walmart Mexico.

n°8: OMD won Fox and increased its Disney Group remit while retaining many brands. In addition, win of Jardiance pharma USA. Departure of Signet Gr USA and Edeka in Germany. Thanks to the Disney + Fox extensions, OMD is positive by \$m 270.

n°9: Arena won SFR/ Altice and Savencia (cheese) in France; won RB in Spain. Departure of LG Electronics.

n°10: Initiative won Falabella in Latin America and Nintendo in USA.

n°11: Spark Foundry won Edeka in Germany, NBCU partly, in the USA.

n°12: Vizeum won L’Oréal Russia,

Vodafone Spain and Groupe SEB globally.

Retentions are not included in the above results. Looking at retentions only, best performances are OMD \$m 1213, Havas \$m 711, Starcom \$m 661, UM \$m 532, Wavemaker \$m 463 and MediaCom \$m 449.

Retentions + wins - departures :

1	UM \$m 1577	3	OMD \$m 1482
2	Carat \$m 1537	4	Havas \$m 1400

Volumetry. In 2019, 982 account moves (wins and retentions) have been registered for a total of \$bn 23.7. Compared to 2018, a decrease in number of pitches (minus 17%) and in budget amounts (minus 14%). North America pitches decreased by 25%. Same number of global accounts have been in play: 281 in 2019 versus 276 in 2018.

Granular data by network and market are available upon subscription on www.recma.com.

The research is accessible from Global tools section> New Biz Balance (interactive database with visualization).

This tool is part of the New biz tools Service which also includes the new RECMA database

SEAS for Short and Easy Advertisers’ Selection : Top 2000 advertisers’adspends & agency partnerships through 60 countries.

Contact: vladimir@recma.com (Americas) | fulbert@recma.com (EMEA) | michele@recma.com (APAC)