

NEW BUSINESS LEAGUE

New business is down 29.9% for January to March 2020 compared to the same period last year as more marketers delay, defer and de-prioritize activities as a result of COVID-19. Revenue for global creative assignments declined 33.7%, where media assignments saw revenue decline by 21%. “This decline won’t get any better through Q2. The message to agencies is clear – hunker down for an annus horribilis,” says R3’s Greg Paull.

2020 CREATIVE AGENCIES NEW BUSINESS LEAGUE

Global /Q2 2020

RANK THIS MONTH	RANK LAST MONTH	AGENCY	RECENT WINS	ESTIMATED YTD WIN REVENUE (USD \$ M)	RECENT LOSSES	ESTIMATED YTD WIN REVENUE (USD \$ M)	NUMBER OF WINS
1	1	VMLY&R	BASF Agricultural US, Intel Global, Amorepacific China Project, Mars China Project	55.1	McDonalds Australia (digital)	52.1	35
2	3	Leo Burnett	US Cellular US, Bank of America US, Vision Express UK, GlaxoSmithKline Japan Project	37.9		37.9	47
3	2	GSD&M	Capital One US	50.0	Popeyes US	37.5	1
4	7	Wunderman Thompson	HSBC Global, Danone Aqua Indonesia, Unilever - Horlicks/Viva US, Mondelez (DesignSutra) US Project	29.9	Hershey India	29.4	73
5	5	Ogilvy	Instagram Japan, Nike Korea, Uncle Toby's cereals Australia, Double 8 games Taiwan Project	28.7		28.7	105
6	4	Grey Group	Discover US, Walgreens Boots Alliance US, Lindt & Sprüngli US	28.3	Marks & Spencer fashion UK	27.9	17
7	8	Havas Worldwide	Yili Group China, Republic Technologies US, Westhaven Solar US	18.3	Westhaven Solar US	16.3	38
8	6	MullenLowe Group	Axe US, Corona US, Corona Seltzer US	18.1	US Cellular US	13.7	19
9	9	Gut	Popeyes US, Nestlé (Alpino, Baton, Garoto, Nestlé y Talento) Brazil, Mercado Pago LatAm	13.5		13.5	3
10	11	BBDO	Tourism Tasmania Digital Australia, Happy Bath Korea, Yes Bank India,	13.4	Pag-IBIG Fund Philippines	13.1	46
11	10	McGarryBow-en	Asahi Super Dry Global, Hershey US	13.5	Branston, Mizkan UK	12.4	3
12	13	Publicis	Castorama France, Sanofi Australia, Nature Made vitamins US, Samsung eCommerce SEA	11.4	Plenty UK	10.9	45
13	14	Isobar	TCL Electronics Global digital	10.2		10.2	17
14	12	Droga5	Hershey US	10.0		10.0	1
15	15=	Saatchi & Saatchi	HKIA Hong Kong Project, Melco Hong Kong Project, Chengdu ICC China Project	8.1		8.1	16
16	15=	Fred & Farid	Longchamp Global	8.0		8.0	1
17	15=	Wieden & Kennedy	Heinz Ketchup US	8.0		8.0	1
18	21	Sapient	Mercedes-Benz China Project	7.8		7.7	10
19	-	Dentsu	Total Gas Stations Brazil	7.5		7.5	67
20	18	Joan Creative	Virgin Hotels US	6.5		6.5	1
						370.3	760

2020 MEDIA AGENCIES NEW BUSINESS LEAGUE

Global / Q2 2020

RANK THIS MONTH	RANK LAST MONTH	AGENCY	RECENT WINS	ESTIMATED YTD WIN REVENUE (USD \$ M)	RECENT LOSSES	ESTIMATED OVERALL YTD REVENUE (USD \$ M)	NUMBER OF WINS
1	1	MediaCom	Audi China Digital, Shanghai Volkswagen and Skoda China, P4 Play Poland	39.1	Allianz France	38.9	57
2	5	PHD	Diageo Global, Lindt US, Royal Enfield motorcycles Global	31.6	AmorePacific China	30.9	38
3	4	Mindshare	PepsiCo China, BBVA Spain, LATAM, Turkey, US Digital, Homeaway Italy	24.7	Mondelez Australia	23.2	44
4	-	Zenith	Shanghai General Motors China, Vitalon Taiwan	17.8	Reckitt Benckiser South Africa	16.9	3
5	7	Wavemaker	Daimler China, Mondelez Australia, Pernod-Ricard travel retail Global	17.3	Vikram Solar India AOR	16.6	3
6	2	Starcom	Skyworth China (Digital media), Bio-essence Taiwan	14.5	Dickies Global	14.4	11
7	-	OMD	Daimler China, SumUp France, Home Credit Bank Russia	24.9	Ancestry Australia	8.9	57
8	3	Universal McCann	Emirates Airlines Global, Nike Korea, Safi Malaysia	8.7	Johnson & Johnson Aus & NZ	5.4	6
9	-	GIC	Audi China Digital	5.0		5.0	1
10	10	Havas Media	ACC Cement India, Nextlot Peru, Oppo Italy	10.9	Emirates Airlines Global	3.0	28
11=	-	Accenture Interactive	BBVA Global Digital	2.5		2.5	1
11=	-	Omnicom Media Group	Johnson & Johnson Aus & NZ	2.5		2.5	1
13	21	MediaHub	La Quinta Hotels US, Lockheed Martin Global, Patron US	2.3		2.3	3
14	6	Horizon Media	Regeneron US, Diamond Producers Association US, Sally Beauty US	6.0	Lindt US	2.2	3
15	28	Tombras	Re/Max US	1.9		1.9	1
16	18=	Initiative	Pernod Ricard Australia, Aussie Home Loans Australia, Mistine Thailand	3.3	Intersnack Europe	1.8	14
17	11=	Spark Foundry	Ancestry Australia	1.7		1.7	5
18	9	Ikon	Myer Australia	1.5	Aussie Home Loans Australia	1.1	1
19	11=	Mediaplus	De'Longhi UK	1.0		1.0	1
20	67	Pilot Media	Miele Germany	0.6		0.6	1
						186.0	450

HOLDING COMPANY NEW BUSINESS LEAGUE

WPP maintains its leading position in the Holding Company table with the highest revenue and number of wins in the first quarter, adding brands such as Intel, Discover, Hasbro and Novo Nordisk to its client list. This puts the company far ahead of Publicis Groupe, Omnicom, Dentsu and Havas, which rounds the top five spots.

2020 NEW BUSINESS LEAGUE HOLDING GROUP RANKING

Global / Q2 2020

RANK THIS QUARTER	RANK LAST QUARTER	HOLDING GROUP	ESTIMATED CREATIVE YTD REVENUE	ESTIMATED MEDIA YTD REVENUE (USD \$M)	ESTIMATED OVERALL YTD REVENUE (USD \$M)	AS % OF 2018 REVENUE	NUMBER OF WINS
1	1	WPP	138.2	77.3	215.4	1.3%	344
2	2	Publicis Groupe	71.3	28.5	99.8	0.8%	158
3	4	Omnicom	21.4	39.9	61.3	0.4%	188
4	3	Dentsu	30.0	16.5	46.6	0.5%	229
5	6	Havas	16.3	3.0	19.3	0.8%	66
6	7	Accenture	11.0	2.5	13.5	0.5%	4
7	8	MDC	-5.0	0.5	-4.5	-0.3%	7
8	5	Interpublic	-17.0	7.0	-9.9	-0.1%	98
					441	0.6%	1,094