

COMvergence

tracking the global MarCom industry

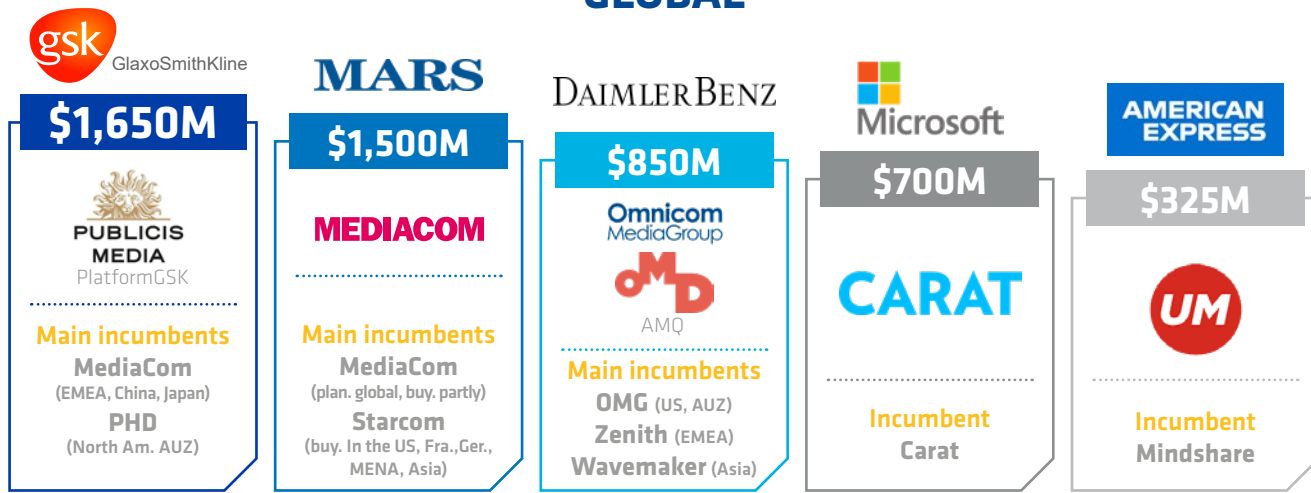
KEY HIGHLIGHTS 2018

GLOBAL MEDIA AGENCY NETWORKS

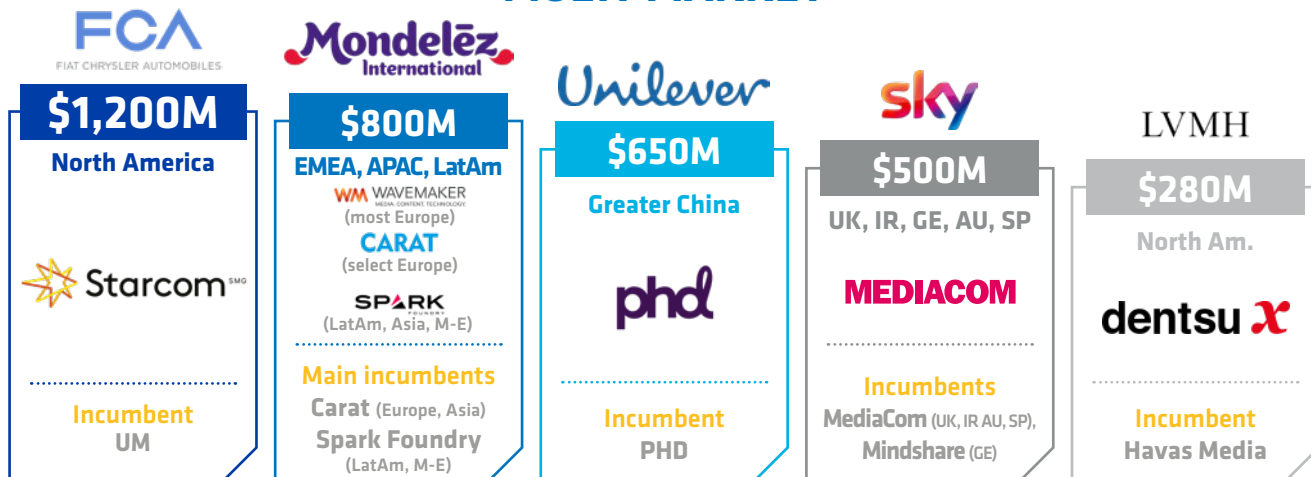
TOP 5 PITCHES 2018

COMvergence has recorded nearly \$30B US of media spend reviewed during the year 2018 – Including US\$11B is described below

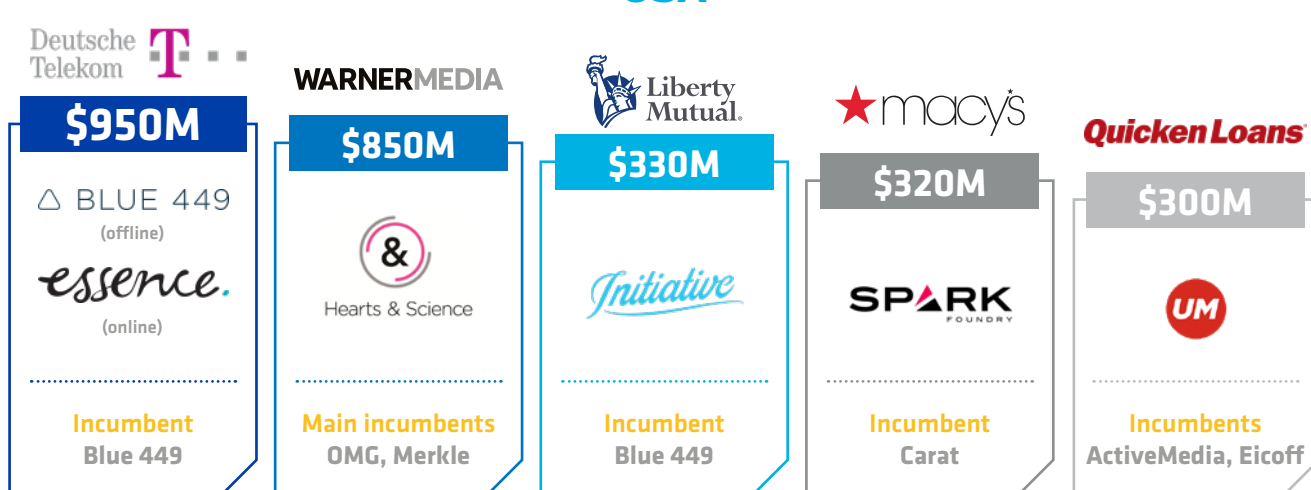
GLOBAL



MULTI-MARKET



USA



MAJOR DEVELOPMENTS

MEDIACOM

Had an unprecedented year, winning FIVE Agency Network of the Year awards for 2018—the first for any agency! (Awarded from: Cannes Lions, Festival of Media, Adweek, Campaign and MMG).

WAVEMAKER

Successfully merged MEC and Maxus, across 90 countries, to create Media, Content & Tech specialist, Wavemaker – the 5th largest network in the world.

BLUE 449

In France, the media agency has merged with creative agency Marcel to offer a new 'creative-media' proposal to national advertisers.

m/SIX

Continued to pioneer industry leading embedded model, with in-sourced agency teams now operating across a growing number of clients and markets.

Initiative

After winning the global media pitches of Amazon, Carlsberg and Lego in 2017, the agency added two new global client wins in 2018: Revlon and Converse.

CARAT

Sean Healy has been appointed as Global Chief Strategy Officer, to support the transformation of Carat as part of the Dentsu Aegis Network.

vizeum

Has teamed up with advertising festival MAD//Fest and young entrepreneur Jack Parsons to ensure the media leaders of tomorrow come from as diverse a range of backgrounds as possible.

Digitas

(formerly DigitasLBI), relaunched its positioning as a Connected Marketing Agency and network of diverse experts spanning data, strategy, media, tech & creative.



Promoted 15-year agency veteran Lynn Lewis as its new CEO for the US. Lewis replaces Kasha Cacy, who left UM a few months ago to join Engine as global CEO.

MINDSHARE

Launched a new consultancy service focusing on voice and visual services designed to help clients navigate the new wave of digital disruption that will be driven by audio and visual technologies.

essence.

Successfully integrated machine learning, driven bidding into the agency's proprietary media management platform Olive.

SPARK

Strong performances in winning several global pitches (Avon, Campbell's Soup, Lenovo, Marriott) plus Mondelez Int'l (Americas, Asia).

Zenith

Celebrating its 30th anniversary. From its original UK base, Zenith became the first media agency to launch in many of the key markets around the world, most notably in China (1994) and the US (1995).

phd

Launched PHD Engine, a bespoke programmatic service for VW brand. PHD Engine pulls together technical experts from PHD, Annalect and Adylic.

& Hearts & Science

Debuted its Net Persuasion research study at the Cannes Lions Festival, which is the third pillar of its thought leadership series, Forces of Change.



The world's largest media agency doubled the size of the gap between themselves and the number two; completely revamped global and regional leadership and remained the most medaled Media Network at Cannes Lions.

Starcom

Named "Strong Performer" in Forrester Global Media Agency Wave (1st Forrester Wave on global media agencies).

dentsu x

Beijing Dentsu has appointed Jonathan Tse as the new President of dentsu X China, the media business arm of Beijing Dentsu.

DEPARTURES OF GLOBAL HEADS

WAVEMAKER

Tim Castree, Global CEO
promoted to CEO GroupM North America

BLUE 449

Andras Vigh, Global President

dentsu x

Takaki Hibino, Global President
promoted to Exec. Chairman D.A.N. APAC

Zenith

Vittorio Bonori, Global President
promoted to CEO Publicis Groupe Italy

CARAT

Will Swayne, Global President
promoted to Global Client Lead (D.A.N.)

APPOINTMENTS OF GLOBAL HEADS

SPARK

Chris Boothe
Global President

dentsu x

Mitsuyuki Nakamura
Global President

CARAT

Christine Removille
Global President

COMvergence's media spend estimates is sourced from (net estimated) Nielsen / Kantar data - ©2019

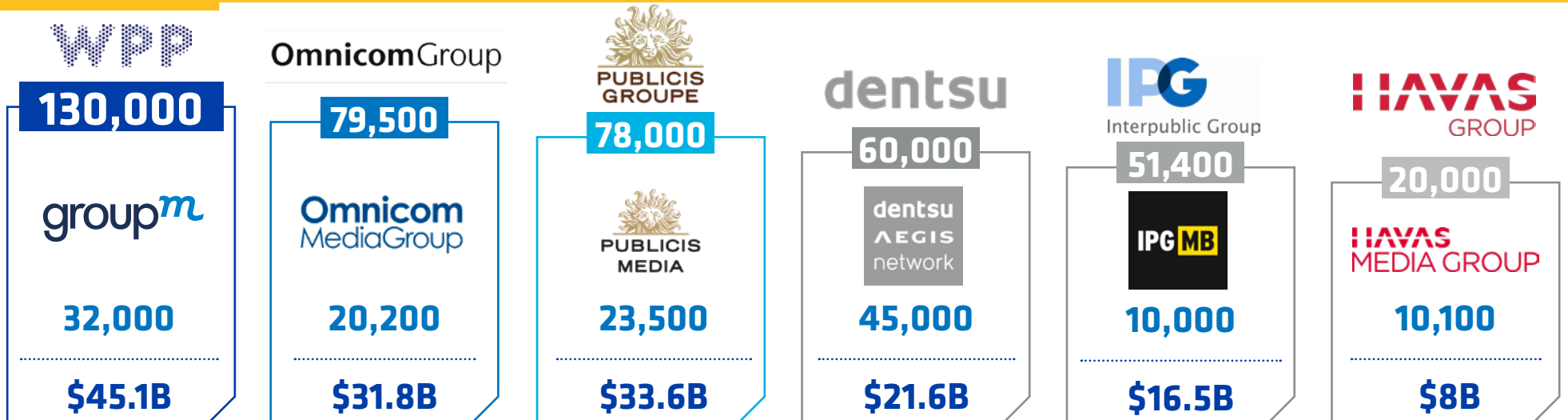
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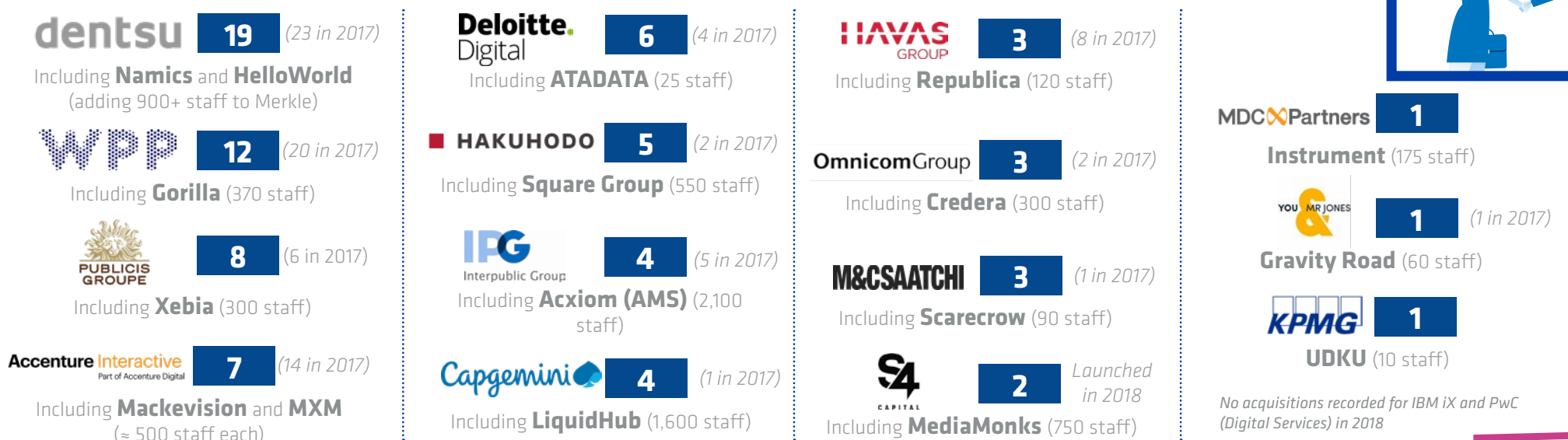
MEDIA AGENCY GROUPS / HOLDINGS

HEADCOUNT & GLOBAL BILLINGS



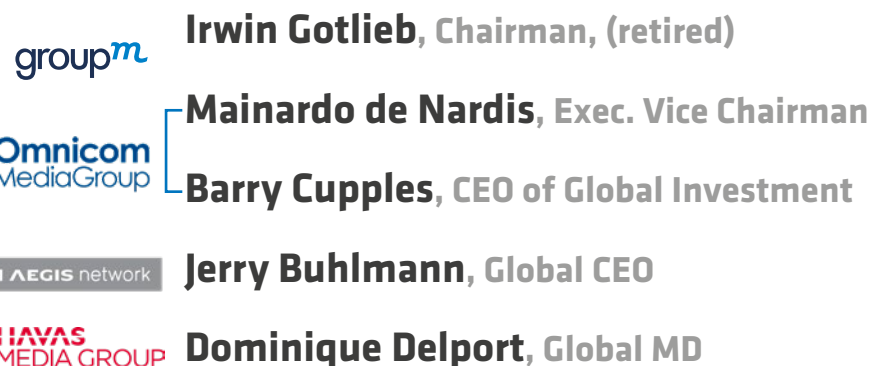
* Global Billings 2018 (projected) figures are sourced from COMvergence estimates released in Nov.2018.

MARCOM AGENCY ACQUISITIONS IN 2018

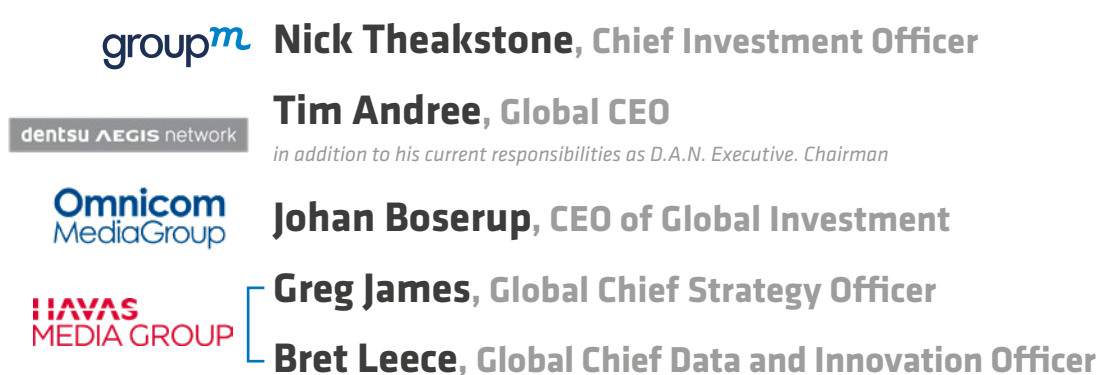


No acquisitions recorded for IBM iX and PwC (Digital Services) in 2018

DEPARTURES OF GLOBAL HEADS



APPOINTMENTS OF GLOBAL HEADS



MAJOR DEVELOPMENTS

groupm Xaxis launched a mobile-first six-second ad format for Twitter, Snap, Spotify & Global; GroupM Published a White Paper on consumer privacy best practices following its GDPR readiness program.

Omnicom MediaGroup Launched Omni, its people-based precision marketing and insights platform, transforming the way Omnicom teams work, collaborate and deliver value.

PUBLICIS MEDIA Launched a new global Commerce practice that works as part of Publicis Groupe's end-to-end Commerce solution to bring technology infrastructure, media and creative into a single offering. Also unveiled a new social marketing capability in the US, UNIT3C, which provides clients with a unique end-to-end social marketing solution.

dentsu AEGIS network In Q3 2018, Dentsu Aegis Network delivered strong organic growth of 7.0%, its best quarterly performance in two years and its fifth consecutive quarter of improving organic growth.

IPG MEDIABRANDS Struck the largest and most strategic acquisition of the year 2018: Axiom Marketing Solutions. The deal, completed Oct. 1, marks a win-win for both companies, sharpening IPG's specialization in an increasingly key field – data – while allowing AMS to tap into a deep network of agency talent and brand clients.

HAVAS GROUP Launched: China Desk, a new offer dedicated to China-related business; and Havas Blockchain, the first global and international communications offering for blockchain tech. Also, the group created an AI innovation center in Montréal.