

MEDIA AGENCY NETWORKS

TOP PITCHES

Unilever

\$3.5B

MAIN* WINNER(S)

havas media
MINDSHARE phd

MAIN* INCUMBENT AGENCY(IES)

Initiative
MINDSHARE phd

PITCH CONSULTANT

pwc
ebiquity

STELLANTIS

\$2.1B

Starcom

Starcom (Fiat, Chrysler)
mediacom (PSA, Opel)

ebiquity

Coca-Cola

\$2BM

mediacom dentsu
japan network

CARAT mediacom
UM

MediaSense

Meta

\$1B

SPARK

MINDSHARE

ID COMMS

DAIMLER

\$800M

OMP

OMP

ebiquity

*Only networks that handle a decent part of the media account are included

FERRERO

\$1.25B

All markets except N.A.

iPROSPECT
MINDSHARE OMP
Starcom

iPROSPECT
MINDSHARE OMP
Starcom

ebiquity

L'ORÉAL

\$600M

DACH, Italy, ANZ, India

Wavemaker

Wavemaker CARAT
Zenith

ebiquity

Lindt

\$175M

EMEA

PUBLICIS
MEDIA

Various agencies

ID COMMS

Nomad Foods

\$150M

EMEA

Zenith

Zenith

flock.

Nestlé

\$150M

UK/Ireland

Zenith

Zenith

ebiquity

T Mobile

\$1.2BM

Initiative

SPARK
essence horizonmedia

ID COMMS

McDonald's

\$775M

Starcom

OMP

Internal

Walmart

\$550M

PUBLICIS
MEDIA PUBW

Haworth

MEDIALINK

Lilly

\$530M

Zenith

OMP

R3

INSPIRE
Brands

\$500M

PUBLICIS
MEDIA

PUBLICIS
MEDIA

J/L
BIP

Total Net Media Spends are based on net offline monitored spend + digital media spend (based on COMvergence estimates)

MAJOR DEVELOPMENTS ACHIEVEMENTS

CARAT

Fiona Lloyd appointed as new Global Client & Brand President to continue its rollout of new Designing for People proposition, which has led to a significant increase in award winning work during 2021, for clients including P&G, Mastercard, Microsoft and Vodafone.

dentsu

Driven by its "experience beyond exposure" proposition, it has both grown and won new clients including Nestlé, DAZN and Madison Reed, under leadership of new Global Client & Brand President, Sanjay Nazerali.

Digitas

was named Campaign US' Media & Digital Networks of the year, had two films selected for the Brand Storytelling showcase at Sundance, and named a Best Place to Work for LGBTQ Equality on the Human Rights Campaign's Corporate Equality Index. Named a Leader in the 2021 Gartner Magic Quadrant for Global Marketing Agencies (6th consecutive year).

essence

added some notable new clients to its roster, such as Deutsche Bank, Bravo, Cleartrip in APAC and the Royal Horticultural Society in EMEA. Campaign US Media Agency of the Year (bronze) and Digiday Most Innovative Agency.

Hearts & Science

With continued expansion globally, Hearts & Science now reaches over 37 markets across the world. Launch of its custom planning process called Brand Recode which has delivered success in new wins such as Peloton, Kaiser Permanente, and Air France.

Initiative

2021 has been a banner year for Initiative. It has nurtured current relationships resulting in organic growth, and ushered in over 165 new clients worldwide, resulting in \$2B+ (5%) of new billings. Top wins include Cigna, NatWest, IAG, Intuit and T-Mobile. US: AdAge Media Agency of the Year.

iPROSPECT

launched globally as a new, end-to-end digital-first media agency in March and scooped 21 awards at Cannes Lions in June. Its focus has been on accelerating brand growth, which it will now do for existing and new clients benefiting from its digital-first proposition.

m/SIX

Its experience of building bespoke, integrated and/or embedded teams has driven tremendous growth for the agency and its clients. Inaugural IPA Effectiveness Accreditation.

mediacom

Seeing the Bigger Picture proposition led to greater integration of media and creative. The Coca-Cola global win evidenced this through a global transformative appointment, as well as the Bayer AG win which saw the relationship expanded to become the single agency of record. Named Global Media Agency of the Year (Adweek) and Network of the Year (Festival of Media Global).

MINDSHARE

launched a new business vision: Good Growth. Good Growth is enduring, diversified and sustainable client growth that generates positive outcomes for all stakeholders. To deliver on this vision, Mindshare introduced a new media services proposition encompassing consultancy (Change) and performance (Neo), appointed new global leadership and unveiled a new brand identity.

OMP

OMD integrated attention-based APIs to examine the relationship between attention, brand choice and mental availability to establish attention-based KPIs that connect strategy, to investment, to business outcomes. The MarTech Breakthrough Awards 2021 - 'Best Interaction Data Analytics Solution' - The Fast Start Dashboard.

Performics

drove momentum in new business, and client growth, through innovation in Advanced Analytics, Intent-Based Marketing, and Talent, winning the U.S. media strategy, planning and buying for American Family Insurance and The General, and becoming the digital AOR for Wawa.

phd

Strong year in terms of new business, including major global client wins, such as Unilever, Red Bull, and Chanel. PHD has also continued to develop its campaign collaboration platform, Omni Studio, enabling clients and creative agency partners to come in and collaborate live on campaigns. Named Cannes Media Network of the Festival.

SPARK

Spark's unique start up spirit inspired another growth busting year with a 20% increase in billings year over year from more than 100 new assignments globally including the hard fought Meta and Humana wins.

Starcom

was the #1 agency in terms of new business performance (both globally and in the US) in 2021, according to COMvergence, a result of winning coveted accounts McDonald's, Stellantis, Planet Fitness, Ferrero, AutoZone, and more. Leveraged Solution Architect practice to unlock the power of Epsilon to drive both client and agency growth.

UM

was awarded Campaign's Global Agency of the Year, APAC's Best of the Best Media Network, and recognized by AdAge for Best Place to Work. With significant momentum around the globe, UM added clients such as Enterprise, Honda and Just Eat.

Wavemaker

delivered excellent growth from existing clients (L'Oréal, BDF & ViacomCBS), new multinationals (DeLonghi, McArthurGlen & ALDI) and especially new economy clients (Coinbase, Square, Doordash, Bumble, SeatGeak, Zwiift, DiDi and more). USA recognized as 'Agency of the Year 2021' by MediaPost.

Zenith

2021 was another hugely successful year for Zenith with its continued focus on ROI, and roll out of its new global planning framework, Growth Platform. Grew organic and new business billings by more than \$3.8Bn in 2021, including new wins Alula, Lloyds Banking Group, Eli Lilly, Lululemon and TD.

APPOINTMENTS OF GLOBAL HEADS

OMP

GEORGE MANAS
Global CEO

Initiative

AMY ARMSTRONG
Global CEO

CARAT

FIONA LLOYD
Global Clients & Brand President

dentsu

SANJAY NAZERALI
Global Clients & Brand President

Starcom

MICHAEL EPSTEIN
Global President

iPROSPECT

AMANDA MORRISSEY
Global Clients & Brand President













MERKLE

MICHAEL KOMASINSKI
Global CEO











MEDIA AGENCY GROUPS/HOLDINGS

HEADCOUNT AND BILLINGS

 107,000 employees  38,000 \$53.1B	 85,000 employees  23,000 \$36.6B	 64,000 employees  22,000 \$33.5B	 64,500 employees  46,000 \$24.6B	 Interpublic Group 54,000 employees  13,000 \$18.3B	 17,500 employees  10,000 \$9.9B
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* Final 2020 Global Billings figures were released by COMvergence in June 2021.

75 MARCOM AGENCY ACQUISITIONS

 21 (8 in 2020) including Imaginea (1,350 staff)	 5 (5 in 2020) including DTI Digital (800 staff)	 Interpublic Group 3 (1 in 2020) including Kinnect (350 staff)	 2 (1 in 2020) including thaltegos (20 staff)
 12 (6 in 2020) including Raccoon (450 staff)	 4 (4 in 2020) including Madras Global (1,000 staff)	 2 (2 in 2020) including Numerator (2,400 staff)	 1 (2 in 2020) DP6 (150 staff)
 6 (1 in 2020) including Areteans (600 staff)	 4 (3 in 2020) including BLKJ (90 staff)	 2 (4 in 2020) including Empired (1,100 staff)	 1 (6 in 2020) Ailove Digital (65 staff)
 6 (3 in 2020) including Boomerang (325 staff)	 3 (2 in 2020) including Quill Content (345 staff)	 2 (4 in 2020) including LiveArea (590 staff)	 1 Goodstuff Communications (130 staff)


APPOINTMENTS OF GLOBAL / REGIONAL HEADS


 FLORIAN ADAMSKI Global CEO GUY MARKS EMEA CEO	 BEN DOWNING Global Director for Ethical Media & Strategic Partnerships	 NNENNA ILOMECHINA Global COO GIULIO MALEGORI CEO EMEA	 DARYL SIMM Global COO	 GUY BEACH Global President MARLENE PELAGE Global Chief Finance Officer
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MAJOR DEVELOPMENTS / ACHIEVEMENTS

 Continued to scale and accelerate retail/e-commerce offering for clients (Havas Market). Led the industry in creating an ethical and inclusive media ecosystem (key initiatives: Meaningful Marketplaces, Sustainability Marketplace, BIPOC Media Network and Havas Boost, Protect our Press). Globally recognized for media excellence - most awarded year since 2015.

 With over \$3B in client wins in 2021, including Meta, Stellantis, Ferrero, L'Oréal, McDonalds, Walmart, and Planet Fitness, Publicis Media topped the new business rankings both globally and in the US. They did this through bold, progressive initiatives like "Work your World" and continued investment into talent platform Marcel, development of their end to end planning system Growth OS, acquisitions such as CitrusAd and investment into proprietary Commerce Intelligence tool providing valuable insights to help retailers and brands grow in the digital space and instore.

 had a strong record of client wins and retentions, including Unilever, Coke, Google, and L'Oréal. GroupM launched its Responsible Investment Framework, with key pillars including its Media Decarbonization Program, Media Inclusion Initiative and Data Ethics Compass. Also created the Addressable Content Practice to focus on relevant outcomes-focused advertising and launched data services solutions group Choreograph.

 launched a media-fueled content division, the Mediabrands Content Studio (MBCS), in core markets around the world, continued raising industry brand safety standards through its bi-annual Media Responsibility Index™ assessment of digital platforms, launched the first-ever Equity Upfront™ to raise visibility of Black-owned and -targeted media businesses in the US, and bolstered its leadership team by hiring Marlene Pelage, formerly of Charles Schwab, as Global Chief Financial Officer.

 saw strong new business momentum, including global wins like Mercedes-Benz, Chanel, and British Airways; pulling cross-network solutions together into bespoke offerings, all underpinned by connected talent, data, technology. OMG launched several industry-first products including OMG Signal, our proprietary audience panel, and the Diverse Creators Network, a cross-platform system that targets diverse publishers and content creators.

 Continued on its journey to be the world's most integrated network, as well as drive positive industry change around social impact, becoming one of the first companies globally to have its Net Zero target validated. Fred Levron appointed as Chief Creative Officer to help accelerate integration and inspire creativity across all Media, CXM and Creative agency brands.