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MEDIA & DIGITAL AGENCY NETWORKS

TOP 5 PITCHES & MOVES

In 2025, COMvergence assessed US\$32bn in reviewed media spend, with nearly one third detailed below:

GLOBAL			
TOTAL NET MEDIA SPEND \$M	MAIN WINNER(S)	MAIN INCUMBENT AGENCY(IES)	PITCH CONSULTANT
MARS 1,600			
 1,250		 Americas, EMEA  APAC	
 900		 Germany  UK, US, Australia  Europe	
 680	 USA  Rest of the world	 USA  Rest of the world	Internal
 575			 

MULTI-MARKET			
TOTAL NET MEDIA SPEND \$M	MAIN WINNER(S)	MAIN INCUMBENT AGENCY(IES)	PITCH CONSULTANT
  830			
LVMH  465	 (Forward Media)		No pitch
  460		 	
  425			Internal
  350		  	

USA			
TOTAL NET MEDIA SPEND \$M	MAIN WINNER(S)	MAIN INCUMBENT AGENCY(IES)	PITCH CONSULTANT
 800		  In-House	Internal
 360		 	Internal
 345			
 220			MEDIALINK
 120			

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

MAJOR APPOINTMENTS OF GLOBAL/REGIONAL HEADS

ASSEMBLY

Jill Kelly, CEO North America
Bridget Hopkins, CEO, Europe
Jason Lim, CMO North Am.



Adam Edwards, Global Chief Product Officer



Bruce Williams, CEO North Am.



Jon Stimmel, Chief Investment Officer North America
Kate O'Ryan-Roeder, CEO ANZ



Stacy DeRiso, Global President

MEDIAPLUS

Stefan Ege, Global Lead Client Commercial Management



George Manas, Global President



Christian Flouch, Global President



Josh Kricheski, President EMEA
Leah Meranus, Senior VP, Customer Success



Susan Kingston-Brown, Global President

MAJOR DEPARTURES OF GLOBAL/REGIONAL HEADS



Leah Meranus, CEO North America
HAVAS Media
Virginia Hyland, CEO ANZ



Dimitri Maex, Global CEO



John Moore, Global CEO



Andrea Suarez, Global CEO



ARENA MEDIA named Agency of the Year in Spain and Portugal and reintroduced its brand in the UK, driving innovation in gaming and digital transformation globally. The agency earned 10 metals at El Sol Festival and additional wins at prestigious awards, including the Festival of Media Global and Effie Awards.



ASSEMBLY is a global omnichannel media agency that combines data, talent, and technology to deliver true brand performance for the world's most ambitious brands. Powered by the STAGE Experience Engine and its Brand Performance Planning approach, it delivers modern, integrated solutions across media, creative, commerce, and technology through 3,000 plus experts in 44 offices worldwide.



brainlabs delivered profitable growth for clients and advanced its AI visibility offering and agentic media operations. The agency expanded its US footprint with new offices and the Exverus acquisition, marking its fifth consecutive year named to Adweek's Fastest Growing Agencies, alongside securing major platform award recognitions.



CARAT 2025 performance included progressive partnerships with Vodafone and Delivery Hero, the inaugural LIA Global Media Network award and a #4 Cannes Lions Media Network ranking. Agency of the Year wins in Greece, Nigeria, Denmark and UK.



dentsu X experienced a strong year of growth globally in 2025, winning new assignments for ServiceNow, Tapestry, bet365 and Kotak Bank. dentsu X was also awarded Agency of the Year across multiple markets and experienced success at the Festival of Media APAC, being awarded with 5 gold medals.



DIGITAS Highlighted within The Drum Honours class of 2025, Digitas' growth was driven by Digitas Pictures and an expanded AI system with Model Sight and NX Score, boosting performance across a Networked Experience. The agency strengthened leadership, appointing Anne Staggs (UK CEO), Davy Rennie (Australia CEO), and Amaresh Godbole (India CEO).



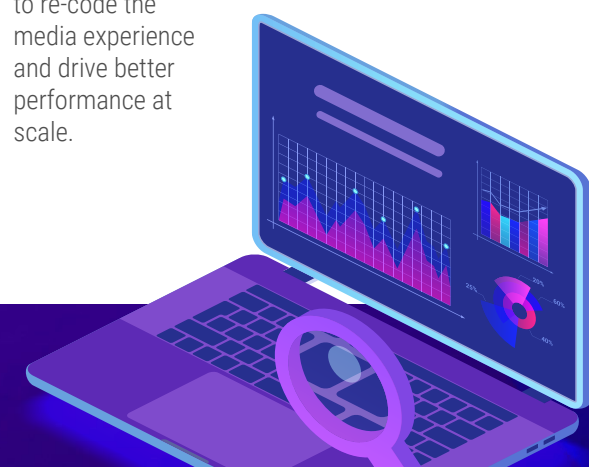
essencemediacom Quality work recognised by the industry; Spike Asia's #1 Network, WARC's #2 Top Agency Network and five Top Campaigns. Further recognition includes World Media Awards Grand Prix, plus top honours for Coca-Cola, Google and Uber across FofM, AdWeek and M&M Global.



HAVAS Media accelerated global growth, expanding capabilities and talent across key markets. The agency strengthened data and technology leadership and advanced sustainability with carbon calculators. Its innovation and scale have earned top honors, including the Grand Prix at Stratégies Média and the Internationalist Awards, and multiple golds at the Media Awards, among many others.



Hearts & Science transforms data signals into meaningful connections between brands and consumers that drive exponential growth. As an Omnicom Media agency, Hearts & Science leverages the scale and technology of the world's largest global media management network to re-code the media experience and drive better performance at scale.



horizon global is a new global media agency network formed as a joint venture between Horizon Media Holdings and Havas Media Network. It's designed to serve global advertisers by combining the strengths, scale and technology of both parent companies into a unified offering, especially for large, internationally-focused accounts.



Initiative is a global media agency built to unlock growth for the world's most ambitious brands. As an Omnicom Media agency, Initiative leverages the scale and technology of the world's largest global media management network to deliver Fame & Flow—combining cultural impact with real-time precision. In 2025, Initiative ranked #1 globally for new business wins & retentions, earned Agency of the Year in multiple regions, Cannes Lions Silver, multiple Effies, and two US & UK Young Lions winners.



iProspect accelerates global leadership: recorded major wins across BMW Group Europe, Dollar General, Salesforce, Carlsberg Britvic, COS APAC and Pandora's global consolidation. The retention of Kering and GSEB further reflects strong client relationships. Recognized as Media Agency of the Year across France, Thailand and the US, with strong innovation awards including 2025 Google Ads Impact Awards for Data Innovation and Microsoft's Emerging Markets Growth Award.



MEDIAHUB WW is a global media agency built to deliver disproportionate growth by disrupting the status quo. As an Omnicom Media agency, Mediahub leverages the scale and technology of the world's largest global media management network to deliver More Pilot. Less Auto.—a hands-on approach that drives outsized results. In 2025, Mediahub delivered over \$700M in new billings and 21% organic growth, earning a Performance Marketing Awards Grand Prix and multiple Effies.

MAJOR DEVELOPMENTS / ACHIEVEMENTS



The largest globally operating independent media agency and #1 in the 2025 WARC Media 100, driving client excellence through the AI-powered Growth Planning System. In 2025, Mediaplus launches WEFRA Mediaplus Global Health, wins major accounts including Burger King, Motel One, GORE-TEX, Lorenz and Changan, and retains key clients such as the German Government and Targobank.



WARC's #1 Agency Network and Festival of Media's Network of the Year. Also the agency earned a Cannes Lions' Grand Prix for Dove's 'Real Beauty Redefined for the AI Era' and Titanium honours for 'Vaseline Verified', in addition to multiple awards from M&M Global and Adweek. Won EA worldwide.



is the world's largest media agency and a global media and marketing powerhouse. As an Omnicom Media agency, OMD leverages the scale and technology of the world's leading global media management network to create what's next, delivering media solutions that transform businesses creatively, culturally, and commercially. At the 2025 Cannes Lions, OMD was named Media Network of the Year for the second consecutive year, and the third time in the past four awards seasons.



continues to advance Publicis' AI capabilities as its key, digital-first capability. With the launch of its agent-based suite for cross-channel optimisation, Performics continues to be honoured with PMA, PMW, SMARTIES and exchange4media awards. Performics also expanded its team with AI specialists to build the next generation of these solutions.



is a global media and marketing communications agency engineered for connected intelligence. As an Omnicom Media agency, PHD combines world-class talent with the scale and technology of the world's largest global media management network to create seamless consumer experiences that help clients outthink, outpace, and outgrow their competition. In 2025, PHD was named Global Media Agency of the Year by Adweek for the second consecutive year.



celebrated major milestones in innovation, earning MediaPost's 2025 Independent Agency of the Year, expanding its commerce capabilities through the acquisition of Momentum Commerce, and launching Alli Marketplace, a first-of-its-kind martech app exchange embedded within the Alli operating system.



advanced its data/tech- and AI-driven media offering, delivering stronger client outcomes. The agency deepened its strategic leadership through key appointments, added 250 cross-capability practitioners, and expanded its service offering into priority markets. Several industry accolades were earned, including Adweek Media Plan of the Year and Adweek Rising Star



secured its fifth consecutive year of global double-digit growth, fuelling expansion in new markets, including India. New leadership appointments, including Canada CEO Maryann Rusnak and UK CEO Nadine Young, drove integration across the PESO ecosystem, prioritising a focus on innovation in AI, commerce and influencer-first planning and buying.



secured \$1.5bn in new business billings driven by global/regional wins and client expansions. U.S. leadership was strengthened by appointing returnees Kate DuBois as Chief Client Officer and Preeti Nadgar as Chief Strategy Officer. Starcom also advanced their AI capabilities by launching "AI Week", focused on innovation, strategy and responsibility.



is a global media agency that transforms media into a powerful growth engine for the world's most dynamic brands. As an Omnicom Media agency, UM leverages the scale and technology of the world's largest global media management network to deliver Full Color Media—a bold, research-backed proposition featuring its Stand Against Bland philosophy. In 2025, UM celebrated 220+ award wins, multiple Agency of the Year accolades, and was named Campaign's Global Network of the Year.



Eurobest Media Network of the Year. Its innovative work was recognised at the FofM and M&M Global Awards. It was a big year for Wavemaker with domestic new business – retaining key accounts in China (Honor & Mercedes Benz), L'Oréal in Italy & Poland, GSK Germany, Angelini Italy, and the UK's largest domestic opportunity the Government.

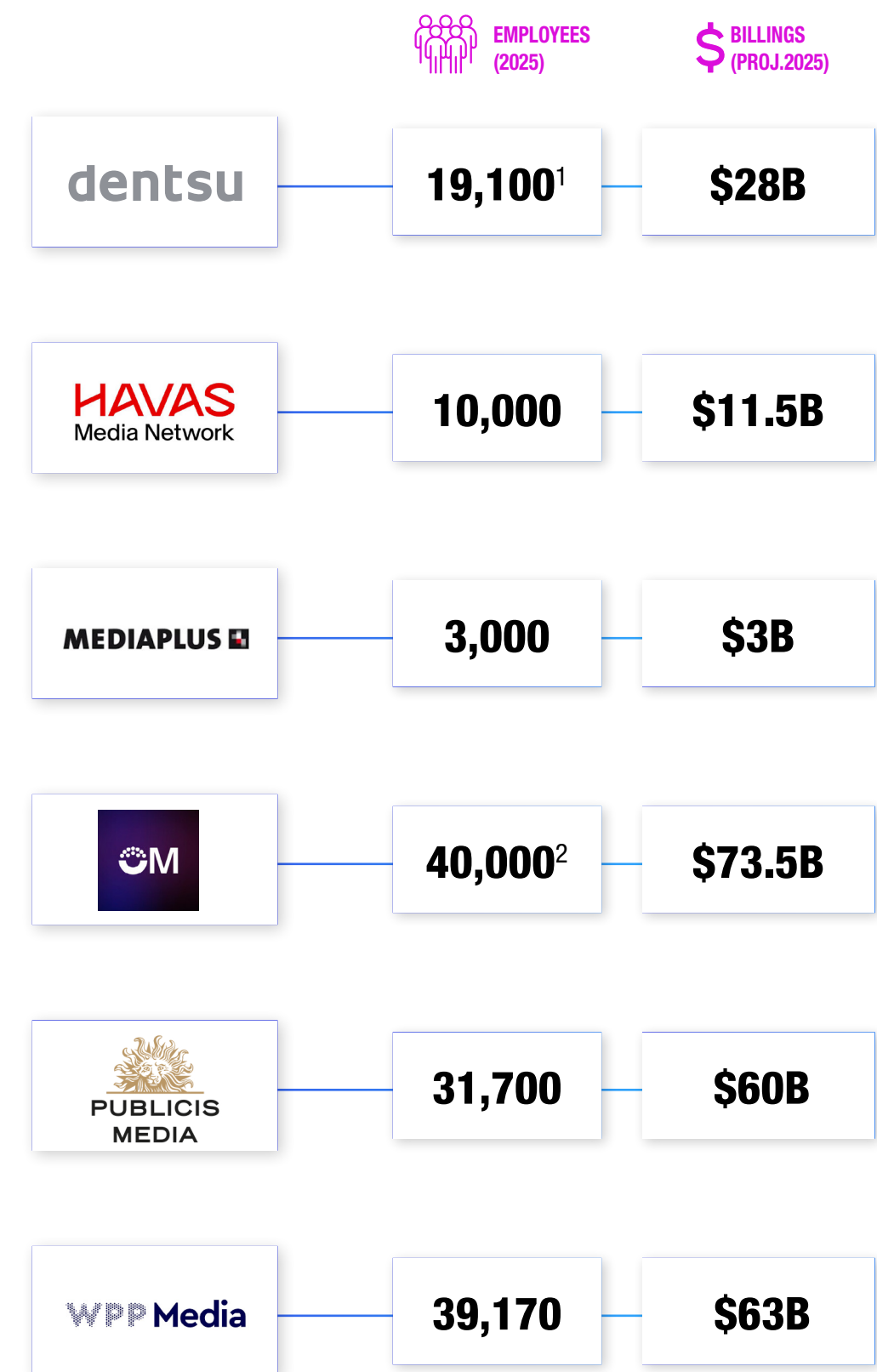


2025 performance was defined by strong new business momentum, generating over \$1.5bn in billings, and exceptional client retention across key global relationships. The agency advanced AI and emerging technology capabilities and delivered standout work, including a Cannes Lion for Rocket Mortgages, demonstrating our commitment to ROI through inventive, effective solutions.

KEY HIGHLIGHTS 2025

MEDIA AGENCY GROUPS & HOLDINGS

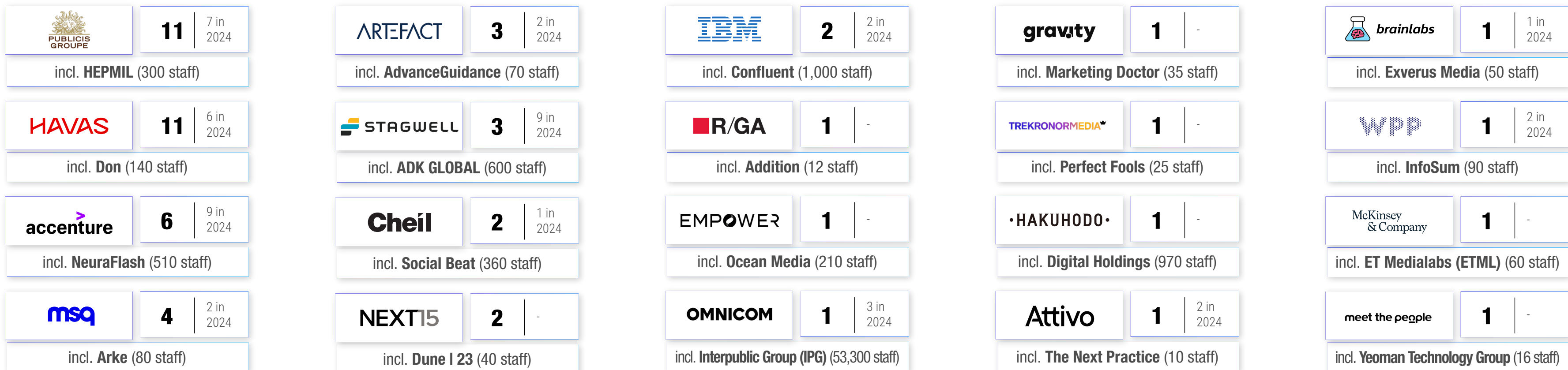
GLOBAL HEADCOUNT & BILLINGS



(1) This number reflects dentsu Media (excluding Japan)

(2) The new 'Omnicom Media' refers to the reorganized and relaunched media operations within Omnicom following its landmark acquisition of IPG in late 2025

55 MAJOR MARCOM ACQUISITIONS




MAJOR APPOINTMENTS OF GLOBAL/REGIONAL HEADS


Accenture Song
Nddi Oteh, Global CEO

dentsu
Kara Osborne, Global Product Architect Officer
Yuichi Toyoda, CEO APAC
Rob Harvey, CEO ANZ
Tia Castagno, Global Innovation President

HAVAS Media Network
Jamie Seltzer, Global Chief Data and Technology Officer
Laurent Broca, Global Chief Growth Officer

 **PUBLICIS GROUPE**
Rahul Titus, Global Influencer Lead
Karin Ross, Chief Media Officer (Publicis Groupe DACH)

 **PUBLICIS CONNECTED MEDIA**
Amy Armstrong, Chief Revenue Officer
Geoffrey Calabrese, Global Chief Commercial Officer

 **PUBLICIS MEDIA**
Steve Bignell, Global Head of PMX LIFT

 **STAGWELL**
Connie Chan, Chief Growth Officer APAC
Slavi Samardzija, Chief Data and Platforms Officer and Global Chair of Media & Commerce

James Denton-Clark, Chief Growth & Client Officer Europe
John Kahan, Chief AI Officer

 **STAGWELL MEDIA PLATFORM**
Matt Adams, Global CEO

 **WPP**
Cindy Rose, Global CEO
Lauren Wetzel, Global President, Data & Technology Solutions

WPP Media

Emily Del Greco, Global Chief Operating Officer
Adam Gerhart, Global Chief Client Officer
Toby Jenner, Global Chief Business Officer
Mark Patterson, Global President of Markets and Business Operations
Jasmine Bahen, Chief People Officer
Caroline Foster Kenny, Global Client President
Stephanie Prager, Global Client President

MAJOR DEPARTURES OF GLOBAL/REGIONAL HEADS

Accenture Song
David Droga, Global CEO

dentsu
Jeff Greenspoon, Chief Global Client Officer Americas
Sean Reardon, CEO Americas

 **WPP**
Mark Read, Global CEO


WPP Media
Sharb Farjami, CEO North America

MAJOR DEVELOPMENTS / ACHIEVEMENTS

dentsu builds on Innovating to Impact with continued global growth, expansion of its Sports & Entertainment capabilities (including a new practice launch in India), and continued expansion of Dentsu Lab. Dentsu's Media++ integrated model simplified its offer, positioning media as the flywheel for growth.

HAVAS Media Network introduced Horizon Global, a joint venture with Horizon Media, to drive growth and innovation worldwide. In 2025, the group scaled Converged.AI across global markets and advanced its ambitious M&A strategy with seven new acquisitions. The group also reinforced its core services: Havas Market, CSA, and Havas Play, expanding capabilities in e-commerce, data and technology, and content activation.

 **OM** Created by the integration of Omnicom Media Group and IPG Mediabrands, Omnicom Media – an Omnicom Connected Capability – strategically unites the talent, technology, and scale of two media powerhouses to create the world's largest global media management network. Powered by the Omni Intelligence Platform, Omnicom Media leverages \$73.5 billion in billings, 40,000+ specialists across 70+ markets. As quantified by Interbrand, Omnicom Media agencies are the stewards of more than \$1.46 trillion in brand value.

 **PUBLICIS MEDIA** led the industry in 2025, delivering \$7.7bn in global new business – over three times the next-ranked network – while continuing to invest ahead of the market across influencer and content (Captiv8, Hepmil), performance marketing (Dysrupt) and identity (Lotame). This strength is driven by the deep integration of Epsilon, Influential and Mars United Commerce. Its Connected Media model unifies media, CRM, influence and commerce into a single, data-driven system, powered by its proprietary AI engine Marcel.

 **STAGWELL** launched Stagwell Media Platform (SMP) its centralized team of global media, technology and data experts and a groundbreaking industry-first AI and data platform with Palantir. Increased global footprint with the launch of Stagwell Italy and new Singapore office. Stagwell's tentpole events grew - SPORT BEACH launched clubhouses at sporting events throughout the year and Future of News launched Newsfronts and the Stagwell News Network.

WPP Media A transformational year. Consolidated agency brands, tech and business operations and deepened integration with WPP. Launched AI-led data solution Open Intelligence, leveraging federated learning to securely connect the world's data and help advertisers go beyond ID solutions. Strong wins following its mid-year rebrand, including Mastercard, Reckitt and Henkel in Europe.