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COMvergence Releases Final 2025 Global Billings & Market Share Report

WPP Media and Publicis Media Lead Group Rankings; OMD Remains #1 Agency Network

FRANCE — JUNE, 19 2026 — COMvergence has released its annual Global Billings and Market Share (BMS) report, presenting **FINAL 2025** media agency and group billings figures, including digital media investments. *"This report provides the most comprehensive and transparent view of the global media agency landscape for 2025. As the industry continues to consolidate, it is more important than ever to have clear, reliable benchmarks — and to distinguish between what has happened and what is projected."* — Olivier Gauthier, Founder & CEO, COMvergence

Group Ranking: WPP Media Leads, Publicis Media Surges

At the group level, WPP Media retains the top position with a 13% industry market share (down from 14.2% in 2024) and \$63.9B in global billings, stable versus 2024. Publicis Media follows, posting the highest growth among the Big 6 groups with an 12.8% rise (+\$7B), reaching \$62.4B in 2025 billings. Omnicom Media Group ranks third with \$48.5B, up 5.5%. Collectively, the top three groups represent 73% of total billings among the Big 6.

Top 3 Global Media Agency Groups - Final 2025

Rank	Media Groups	Total Billings2025 \$US M	Share of Digital 2025	Industry Market Shares 2025	Intra Big 6 Group Market Shares 2025	#Clients	Total Billings 2024 \$US M	Growth 2025 vs. 2024 \$US M	Growth 2025 vs. 2024
#1	WPP Media	63 858 M\$	56 %	13%	27 %	6 270	63 995 M\$	-138 M\$	-0,2 %
#2	Publicis Media	62 441 M\$	59 %	13%	26 %	3 864	55 381 M\$	7 059 M\$	12,8 %
#3	Omnicom Media (OMG)	48 547 M\$	60 %	10%	20 %	4 257	46 034 M\$	2 512 M\$	5,5 %
-	Omnicom Media	75 623 M\$	58%	15,8%	31%	7 271	74 166 M\$	1 457 M\$	2,0%

A Note on Omnicom Media

The acquisition of IPG by Omnicom was approved in late 2025. Combining the media billings figures of Mediabrands and OMG into the new Omnicom Media (OM) group would bring the total to \$75.6B, placing the new group in a potential first position.

Agency Network Rankings: OMD Holds the Top Spot

At the agency network level, OMD retains the top position with total billings of \$26.9B (+1.7% vs. 2024), followed by EssenceMediacom in second place with \$23.3B (-3.9% vs. 2024) and Mindshare in third with \$20.5B, while Zenith and Starcom complete the Top 5, posting the highest growth rates among the top 15 media agency networks, at +11.4% and +9.5% respectively.

Top 5 Global Media Agency Networks - Final 2025

Rank	Media Agencies	Owner Groups	Total Billings 2025 \$US M	Share of Digital 2025	Industry Market Shares 2025	Intra network Market Shares 2025	#Clients	Total Billings 2024 \$US M	Growth 2025 vs. 2024 \$US M	Growth 2025 vs. 2024
#1	OMD	Omnicom Media (OMG)	26 864 M\$	59 %	5,6%	12,2%	2 239	26 410 M\$	454 M\$	1,7 %
#2	EssenceMediacom	WPP Media	23 303 M\$	55 %	4,9%	10,6%	1 870	24 251 M\$	-948 M\$	-3,9 %
#3	Mindshare	WPP Media	20 468 M\$	58 %	4,3%	9,3%	1 950	21 656 M\$	-1 188 M\$	-5,5 %
#4	Zenith	Publicis Media	17 202 M\$	59 %	3,6%	7,8%	1 218	15 445 M\$	1 757 M\$	11,4 %
#5	Starcom	Publicis Media	17 184 M\$	60 %	3,6%	7,8%	1 069	15 692 M\$	1 492 M\$	9,5 %

KEY TAKEAWAYS

The global billings managed by media agency networks owned by the Big 6 HoldCos. plus major independent media agencies reached **\$265B** in 2025, experiencing an overall growth of **+1.7%** vs. 2024.

The 2025 total media agency billings represent **55%** of the global (net) media spends which COMvergence estimates to be **\$478B** (up +4.6%) across 49 markets, versus \$457B in 2024. The remaining 45% is managed by smaller independent media and digital specialized agencies, as well as Brazilian, Chinese, Japanese, and South Korean non-assessed local advertising agencies, and in-house advertiser units (notably for the search and programmatic assignments).

This study covers **107 independent** media agencies, which collectively account for **\$32 billion** in 2025 billings—approximately **12%** of the total billings managed by all agencies globally. **Horizon Media** (US) stands out as the largest independent agency worldwide, with **\$7.4 billion** in 2025 billings, representing 23% of all independent agency billings. **Local Planet** comprised of independent local media agencies present in most covered markets shows a total billings 2025 of **\$14B**, whilst **Mediaplus** (counting 25-owned local agencies globally) generated a total billings of **\$3.2B**.

COMvergence estimates that digital media accounted for **57%** of global media billings in 2025, totaling **\$151 billion** across the Big 6 groups and major independent agencies—a **+9%** increase compared to 2024.

The **FY 2025 Global New Business Barometer** (released March 2026) recorded a total reviewed media spend of **\$37B**, representing **14%** of total billings controlled globally by the Big 6 plus independent agencies.

About COMvergence:

[COMvergence](https://www.comvergence.net) is a leading global research firm specializing in providing in-depth insights into the media and advertising landscape. Through its comprehensive reports, interactive tools and data analytics, COMvergence helps advertisers, media agencies, consulting firms, and AdTech companies to gain a clearer understanding of the competitive landscape, agency performance, and key industry trends.

For more information, please contact Oliver Gauthier, Founder and CEO olivier.gauthier@comvergence.net

www.comvergence.net