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<https://www.adweek.com/agencies/u-s-media-agency-report-names-publicis-and-ipg-as-2018s-current-biggest-winners/>

U.S. Media Agency Report Names Publicis and IPG as 2018's Current Biggest Winners

T-Mobile was the top account in review

COMvergence's new report singled out the best—and worst—performing U.S. media agencies in 2018 so far.

COMvergence released its report of the best-performing media agencies through the first half of 2018, revealing Publicis Groupe's Blue 449 as the top shop in terms of new billings due to its retention of T-Mobile's offline account, which is estimated to be worth \$940 million.

Blue 449 did lose digital planning and buying duties for T-Mobile, which COMvergence placed at \$50 million, to GroupM's Essence.

The report showed Blue 449's total new business gains (which COMvergence calculated by subtracting account losses from the total of new client wins plus retentions) amounted to \$715 million while IPG's Initiative, rounding out second place on the list, reeled in \$462 million. Horizon Media came in third with \$358 million in new billings, Spark Foundry at fourth with \$247 million and Wieden + Kennedy came in fifth with \$208 million.

USA Media AGENCIES		TOTAL New Business incl. retentions in \$US M	NEW CLIENT WINS		LOSSES		RETENTIONS		NET New Business excl. retentions in \$US M
			Number	Total adspend in \$US M	Number	Total adspend in \$US M	Number	Total adspend in \$US M	
1	Blue 449	+715	2	171	3	-407	2	951	-236
2	Initiative	+462	4	575	2	-113	-	-	+462
3	Horizon Media	+358	7	458	1	-100	-	-	+358
4	Spark Foundry	+247	3	621	5	-374	-	-	+247
5	Wieden+Kennedy	+208	1	208	-	-	-	-	+208

Organized by holding group, Publicis Media ranked first by COMvergence with \$1.1 billion in new billings, followed by Mediabrands (\$635 million), Omnicom Media Group (\$244 million), MDC Media Partners (\$119 million) and Havas Media Group (\$117 million).

COMvergence said there were 70 major media pitches during the first half of 2018 that totaled \$5.9 billion, a 30 percent increase in dollars put in play compared to the first half of last year. By the end of 2018, the firm predicted that U.S. media spend in play will exceed the \$11 billion recorded during the "mediapalooza" of 2016.

T-Mobile was the largest account to go into review during the first half of 2018, totaling \$990 million across offline and digital channels. Microsoft came in second at \$430 million, retained by Dentsu Aegis Network; then Macy's at \$356 million, picked up by Spark Foundry and Digitas; Liberty Mutual was in fourth place at

\$345 million, which went to Initiative; then UnitedHealth at \$253 million, sent to Horizon Media; and Amgen came in sixth at \$249 million, which went to Omnicom’s Hearts & Science.



In terms of media reviews by category from 2016 through the first half of 2018, the report showed telecom providers put the most money at play with a total of \$3.6 billion, followed by automotive at \$3.3 billion, retail at \$2.4 billion and restaurants at \$2 billion.

COMvergence singled out Dentsu and WPP’s GroupM as two of the worst performers during the first half of the year, losing \$911 million and \$688 million in billings, which “could not be offset despite several new clients wins.” GroupM’s Wavemaker most notably lost the \$167 offline media account of Campbell’s to Publicis, the \$110 million Marriott International offline account to Spark Foundry and Amgen to Omnicom. Dentsu’s Carat lost the Macy’s account to Spark Foundry and Digitas and the \$155 million Mondelez International account to Spark Foundry.

Independent or standalone full-service agencies won 19 of the 66 accounts analyzed by COMvergence, collectively picking up \$1 billion. Four brands took their media accounts from holding company-owned agencies to indie shops, including KFC to W+K, Mondelez International (digital) to VaynerMedia, Merial (Boehringer) to Assembly and Burlington Stores to Horizon.

The report showed Procter & Gamble consolidated planning and buying duties for its haircare division with Carat and Reckitt Benckiser consolidated with Zenith—both without a formal search.

According to COMvergence, media agency networks are also increasingly creating dedicated units for brands. Since the start of 2018, the report highlighted, Publicis Media launched a dedicated unit for Campbell’s Soup, Mediabrands for Estee Lauder, WPP for BP, Publicis for Marriott International and WPP for Nestle.

COMvergence reported that retentions continue to slip with only five out of 66 media accounts in review successfully defended by the incumbent agency during the first half of 2018. In the first half of 2017, there were eight out of 99 accounts retained, a decline from 2016 when 16 out of 94 accounts were defended.