

# ADWEEK 40

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## These Were the Most Significant Moments for Media Agencies in 2019



Okay, we're a little behind on this one.

COMvergence shared an overview highlighting the most significant moments for media agencies in 2019, which would have been much more timely last month. But between print deadlines, chasing tips, reporting on breaking news and, oh yeah, the Super Bowl, we fell a bit behind. So now it's mid-February, but we still found this an interesting look back at the year behind us, so we're going to spend a bit of time on it anyway.

COMvergence founder and CEO Olivier Gauthier characterized 2019 as "another busy and challenging year for media agencies," explaining that of the \$24 billion of global media spend monitored by COMvergence through media pitches, only around \$6 billion (25%) remained with incumbent agencies.

"In terms of results, Carat and OMD have been the most successful global leading agencies in billings. Dentsu Aegis Network and GroupM (global leading group in billings) lead the new business ranking among the big 6 media agency groups. Also, GroupM and Mediabrands have announced several leadership changes," Gauthier said.

Among the most significant global pitches of the year was Disney's mammoth review, which mostly saw the entertainment monopoly split between Omnicom and Publicis Groupe, via the holding companies' respective OMG23 and Publicis Imagine dedicated units. Novartis was the next largest global review, which concluded with the Swiss pharmaceutical giant consolidating its account with Publicis Groupe. Reviews for Pfizer, eBay and LG Electronics also were among the year's most sizable global pitches.

P&G topped the list for multi-market reviews. That process ended with P&G consolidating much of its account with Carat early in the year while also taking a significant amount of work in-house. Other large multi-market reviews included Ferrero, Vodafone, Hyundai-Kia and Huawei.

In the U.S., the most substantial review of the year was pharmaceutical company Allergan, which sent its media account to GroupM's Mindshare after initially selecting Publicis Groupe's Spark Foundry. Other top reviews in the U.S. included the NFL sending its account to OMD without a review and NBC, which appointed Spark Foundry.



**COMvergence** tracking the global MarCom industry **KEY HIGHLIGHTS 2019**

**MEDIA AGENCY NETWORKS**

**TOP 5 PITCHES 2019**

COMvergence has assessed about 24 billion US dollars of media spend reviewed during the year 2019 - representing nearly US \$9B as follows

<p><b>Disney</b></p> <p><b>\$2,000M</b></p> <p><b>Zenith</b> OMG23 Publicis Imagine</p> <p><b>MAIN INCUMBENTS</b> OMD, Carat, Mindshare, Zenith</p>	<p><b>NOVARTIS</b></p> <p><b>\$550M</b></p> <p><b>Starcom</b></p> <p><b>INCUMBENT</b> Starcom</p>	<p><b>Pfizer</b></p> <p><b>\$400M</b></p> <p><b>PUBLICIS MEDIA</b> Platform GSK</p> <p><b>INCUMBENT</b> Wavemaker</p>	<p><b>ebay</b></p> <p><b>\$300M</b></p> <p><b>MEDIACOM</b></p> <p><b>MAIN INCUMBENTS</b> MediaCom, Blue 449</p>	<p><b>LG Electronics</b></p> <p><b>\$260M</b></p> <p><b>phd</b></p> <p><b>MAIN INCUMBENTS</b> Horizon Media (US), Havas Media</p>
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<p><b>P&amp;G</b></p> <p><b>\$2,750M</b></p> <p><b>NORTH AMERICA</b></p> <p><b>CARAT</b> 80% Hearts &amp; Science 20%</p> <p><b>MAIN INCUMBENTS</b> Carat, Hearts &amp; Science</p>	<p><b>FERRERO</b></p> <p><b>\$450M</b></p> <p><b>MULTI-MARKETS</b></p> <p><b>MINDSHARE</b> Starcom</p> <p><b>m/SIX</b> vizeum</p> <p><b>MAIN INCUMBENTS</b> PHD, Carat (China)</p>	<p><b>vodafone</b></p> <p><b>\$425M</b></p> <p><b>EMEA</b></p> <p><b>CARAT</b></p> <p><b>MAIN INCUMBENTS</b> Wavemaker Mindshare</p>	<p><b>HYUNDAI KIA MOTORS</b></p> <p><b>\$365M</b></p> <p><b>EUROPE</b></p> <p><b>h havas media</b></p> <p><b>INCUMBENT</b> Havas Media</p>	<p><b>HUAWEI</b></p> <p><b>\$220M</b></p> <p><b>MULTI-MARKETS</b></p> <p><b>WM WAVEMAKER</b></p> <p><b>MAIN INCUMBENTS</b> Wavemaker, PHD, Vizeum</p>
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<p><b>Allergan</b></p> <p><b>\$340M</b></p> <p><b>MINDSHARE</b></p> <p><b>INCUMBENT</b> MediaCom</p>	<p><b>SANOFI</b></p> <p><b>\$295M</b></p> <p><b>h havas media</b></p> <p><b>INCUMBENT</b> KWG</p>	<p><b>SIGNET JEWELERS</b></p> <p><b>\$230M</b></p> <p><b>MEDIACOM</b></p> <p><b>INCUMBENT</b> OMD</p>	<p><b>NFL</b></p> <p><b>\$200M</b></p> <p><b>OMP</b></p> <p><b>INCUMBENT</b> in-house</p>	<p><b>NBC</b></p> <p><b>\$140M</b></p> <p><b>SPARK</b></p> <p><b>INCUMBENT</b> Essence</p>
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\* Australia, New Zealand, Ireland, India, Qatar and Netherlands were not part of the pitch.

COMvergence's net media spend estimates are sourced from (net estimated) Nielsen / Kantar data.

**DEPARTURES OF GLOBAL HEADS**

- MEDIACOM** **TOBY JENNER** Global COO promoted to Global CEO Wavemaker
- essence** **CHRISTIAN JUHL** Global CEO promoted to Global CEO GroupM
- phd** **MIKE COOPER** Worldwide CEO promoted to CEO, OMG APAC & EMEA
- Hearts & Science** **SCOTT HAGEDORN** Global CEO promoted to CEO OMG North America
- PUBLICIS SPINE** **LISA DONOHUE** Global CEO
- UM** **DARYL LEE** Global CEO promoted to Global CEO Mediabrands
- REPRISE** **TIM RINGEL** Global CEO
- iProspect** **RUTH STUBBS** Global CEO appointed to Wavemaker EMEA CEO

**APPOINTMENTS OF GLOBAL HEADS**

- WM WAVEMAKER** **TOBY JENNER** Global CEO
- WM WAVEMAKER** **KATRINE GRAUGAARD** Global Head of Marketing
- WM WAVEMAKER** **ANNA HICKEY** Global Client President
- MEDIACOM** **NICK LAWSON** Global COO
- essence** **KYOKO MATSUSHITA** Global CEO
- phd** **PHILIPPA BROWN** Worldwide CEO
- Zenith** **MATT JAMES** Global Brand President
- CARAT** **MICHAEL EPSTEIN** Global CEO
- UM** **EILEEN KIERNAN** Global CEO
- REPRISE** **DIMITRI MAEX** Global CEO

**MAJOR DEVELOPMENTS / ACHIEVEMENTS**

<p><b>OMP</b> Adweek's Global Agency of the year 2019, OMD launched a global end-to-end process called OMD Design that ensures better business outcomes. It scales innovation through the practice of empathy &amp; is fully connected into Omnicom's precision marketing platform Omni. George Manas appointed President &amp; Chief Media Officer OMD USA.</p>	<p><b>Starcom</b> has secured the biggest successful retention pitch of the year, Novartis Adweek Media Plan of the Year Best Use of Branded Content/Entertainment, Samsung's "DoWhatYouCan't", Best Use of Programmatic, Van's VF Corp "Not Just One Creator".</p>	<p><b>SPARK</b> Evolution of Spark Foundry and Blue 449: United the global networks to create one global powerhouse proposition under the Spark Foundry brand in majority of markets. Also the network was named "Strong Performer" in the Forrester Wave™: Full-Service Media Agencies, Q1 2019.</p>	<p><b>dentsu x</b> dentsu x has been recognized as the fastest growing agency in the world with 40% YOY growth rates; and continues massive expansion and scale with 62% growth in China, onboarding Gravity in the US and in the UK bringing together Fetch and 360i.</p>
<p><b>MINDSHARE</b> named Media Network of the Year at the 2019 Cannes Lions Festival of Creativity as well as at Global Festival of Media Awards. Also named Global Mobile Agency of the Year by the MMA for the third year in a row.</p>	<p><b>Zenith</b> played a key role in partially securing the biggest pitch of the year, Disney, Adweek's 2019 Media Plan of Year: Cause Marketing, Verizon's "The Team That Wouldn't Be Here", Best Use of OOH, Visible's "404 Store Not Found", Aligned Zenith USA with sister agencies Moxie and MRV under one CEO, Lauren Hamahan.</p>	<p><b>h havas media</b> New strategic direction and a new common mission, make a meaningful difference to brands, businesses, and people. The Group has tripled its presence in India (3 acquisitions in 2019) and opened 7 new villages (62 across the world).</p>	<p><b>Hearts &amp; Science</b> named Erin Matts US Chief Executive Officer. She replaces Scott Hagedorn who has been promoted to North America CEO of parent firm Omnicom Media Group (OMG).</p>
<p><b>CARAT</b> Awarded P&amp;G US media business in largest single agency consolidation of 2019 in January. Appointed Michael Epstein as Global CEO and Angela Steele as US CEO. Epstein also named Adweek Media Executive of the year.</p>	<p><b>UM</b> enjoyed another strong growth year with the promotion of Eileen Kiernan, former head of dedicated I&amp;J unit (in addition of new accounts Nestlé, Levi's Strauss &amp; Co, Mattel, Energizer, Just Eat, CVS Health Aetna, and Shangri-La Hotels, and win of its first Entertainment Grand Prix at the Cannes Lions Festival.</p>	<p><b>Initiative</b> In the face of strong headwinds, a declining market and a highly competitive environment, Initiative won and retained between \$700M and \$1B in billings. This strong growth was coupled with Initiative being named Adweek's Media Agency Of The Year and Ad Age's Comeback Agency Of The Year in 2019.</p>	<p><b>essence</b> Received Agency of the Year recognition from both Adweek and Mediapost.</p>
<p><b>MEDIACOM</b> Named Media Network of the Year by Spikes Asia, MSM Global and WARC in 2019, and topped the year by winning Campaign's Agency Of the Decade (the second decade in a row), #4 globally, MediaCom is the fastest growing Top 10 agency network.</p>	<p><b>phd</b> retained their Eurobest Media Network of the Year title for the second year, developed their relationship with Pokersstars to win The Stars Group global account, as well as winning the Delta Airlines, LG Electronics, Singapore Airlines and Tik Tok global accounts.</p>	<p><b>vizeum</b> Vizeum had two critical appointments in 2019. Paul Wilson was appointed Global Chief Strategy Officer and Ashley Earnshaw as CEO, Vizeum Australia.</p>	<p><b>m/SIX</b> Transformational year of global growth, delivering new models for clients and now with more than half its staff in embedded onsite teams.</p>
<p><b>WM WAVEMAKER</b> has added a range of clients including AXA Insurance, and exceptional award wins including the Cannes Lions Glass Grand Prix. Now looking at a strong 2020 under the new leadership of Global CEO, Toby Jenner.</p>			<p><b>Performics</b> named "Strong Performer" in the Forrester Wave™: Performance Marketing Agencies, Q3 2019.</p>
			<p><b>Digitas</b> named a Leader (for the 4th consecutive year in Gartner's 2019 Magic Quadrant for Global Marketing Agencies.</p>

2019 also saw a good deal of M&A in the industry. The most notable of these, of course, was Publicis Groupe's \$4.4 billion acquisition of Epsilon, one of six additions for the holding company in 2019. Dentsu Aegis Network added a dozen of its own, and Martin Sorrell's S4 Capital went through a bit of a spending spree of its own.

Gauthier noted that the year's 51 agency acquisitions represented a 40% decline from 2018.

"The largest deal was the Epsilon acquisition by Publicis, while Martin Sorrell's digital marketing venture S4 Capital, is accelerating its development with 7 new acquisitions," he said.