

Industry Update

A summary of newsworthy client/agency relationship developments and relevant marketing or agency management trends from the past month.

Volume 17

Executive Summary – Monthly Recap

In the month of October, it was hard to ignore the buzz around the U.S. presidential elections and some big announcements like social darling Snapchat preparing an IPO that will value the company at around \$25 billion, or AT&T’s \$85 billion bid for Time Warner referred by Randall L. Stephenson, AT&T’s chairman and chief executive, as “a perfect match of two companies with complementary strengths who can bring a fresh approach to how the media and communications industry works for customers, content creators, distributors and advertisers.” For marketers, the ANA Masters of Marketers was an opportunity to discuss growth and brand-building strategies for iconic brands like P&G, McDonald’s, Verizon, Google, CVS Health, MasterCard, Mattel, and J&J. The key themes were centered around never-ending business transformation; embracing ambiguity (aka “ambidextrous marketing”); raising the bar on creativity; elevating the craft of advertising; being more engaging with storytelling; and using a more flexible, fast and innovative approach to marketing through effective collaboration and content-first strategies.



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Newsworthy Reports and Recent Developments

At AMS, we approach the agency management discipline as four distinct but complementary practice areas which is how we categorize the following developments:

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Talent – securing the right talent and resources

The recent McDonald’s win by Omnicom to put together a multidisciplinary shop with 200 staffers that will partner on site with employees from Google, Facebook and The New York Times content studio, in addition to people from other Omnicom agencies, is another example of global brands looking for one-stop integrated solutions with fewer parts to manage, like custom holding-company solutions by other holding companies for clients like Ford (Global Team Blue) and Colgate-Palmolive Co. (Red Fuse).

In his speech “We are stronger together than we are apart” at ANA Masters of Marketing, Verizon’s CMO Diego Scotti challenges these brands, including competitor AT&T, which also consolidated its agency roster with Omnicom, to get better-quality work from a group of best-in-class agencies that collaborate effectively together.

- Expect more agency reviews as CMO turnover increases. A new report from Russel Reynolds Associates showed that **marketing leadership turnover** reached a new high with 175 appointments in the first six months of the year, a 31% increase YOY, and 62% of brands replace their CMO with someone from outside the company.
- AAR reported a 14% drop in the number of completed **account reviews** during the first nine months of the year, citing client uncertainty about Brexit and the increasing emphasis agencies are putting on organic growth as major reasons.
- **Meat & Produce**, an extension of KPS’s Attention (a global social marketing agency), helps to plan, execute and scale influencer marketing programs and campaigns. It opened a 5,500-square-foot studio in Santa Monica, combining a state-of-the-art co-working space, content production facility and professional service support.
- **Dentsu Aegis Network** acquired programmatic shop Accordant Media, following up on the acquisition of data and analytics shop Cardinal Path, as well as a majority stake in performance marketing agency Merkle. Dentsu Aegis Network’s Vizeum is becoming a business unit within sibling shop 360i in the U.S., a move to offer integrated solutions for brands, especially mid-size advertisers.
- New independent, boulder-based shop called “**Work in Progress**” is launched by former CP&B staffers who helped make Domino’s a benchmark for new-era marketing.

- **Procter & Gamble Co.** Chief Brand Officer Marc Pritchard took over as chairman of the Association of National Advertisers. His priorities: quality, equality and transparency (for both clients/agencies).
- Telecommunications giant **Sprint's** marketing efforts are handled by a consortium of agencies including Yellow Fan Studios, the brand's in-house capability. The brand is rumored to be moving more of its work in-house and away from creative agency of record Deutsch.
- Five agencies — BKV, DRUM, Hiccup NY, Resonant Analytics and UMarketing — joined forces to create a new entity called **unified.agency**, which is positioned to deliver high-touch customized advertising solutions to companies with small- to medium-sized budgets.
- **PepsiCo** is handling increasingly more social in-house, leveraging internal resources. The brand has a 4,000-square-foot content creation studio in the heart of SoHo, which includes a 2,300-square-foot multiuse recording studio.
- **72andSunny** opened a social media influencer division, dubbed Sundae, to help brands with growing content needs tap into a network of social media content creators who have a minimum of 10,000 followers. It follows in the footsteps of Omnicom Group's BBDO Worldwide, which opened Flare Studio, a crowdsourcing platform to draw in influencers, freelancers, filmmakers and directors.
- **Mattel** hired Tongal's community of 120,000 creators to crowdsource content, including video specials, YouTube series and television spots, in a two-year deal to promote Mattel's toy brands in partnership with its creative agency BBDO. Tongal's recent Hot Wheels video series resulted in 4+ million YouTube views.
- **General Mills** required participating agencies in the brand's review to be staffed with at least 50% women and 20% people of color within the creative department to foster greater diversity.
- Noteworthy quotes:
 - » "The goal of this latest wave of agency streamlining we're seeing right now is obviously greater integration. ... It's supposed to make it easier for those of us hiring the agencies. But the reality is that we get greater uniformity and more risk-averse middle managers, fewer new ideas and more redrafts. The voices and perspectives of true experts and innovative thinkers are buried deeper in the bowels of corporate giants, shielded from the light and sanded down before they ever reach our customers. And all because the agencies think that their clients are just too lazy to handle the best talent. I see some of our competitors going all in on single agencies, and I find it very hard to believe they are getting high quality work out of that." Diego Scotti, chief marketing officer, **Verizon**
 - » "Razorfish has changed dramatically, and its positioning is no longer what we call a digital agency. It is all about experience." Maurice Lévy, chairman and CEO, **Publicis Groupe**

Work – producing great work and outcomes

Trust and transparency in media planning and buying activities remain high on advertisers' lists of top concerns, leading companies like General Electric Co., J.P. Morgan Chase & Co., and Nationwide Mutual Insurance Co. (and many others in the next few months) to launch comprehensive audits of their agencies because of the lack of visibility, transparency and disclosure about current media activities by their agencies. Thus, brand advertisers are likely to reconsider performance-based buying platforms that are not providing adequate transparency. In response to the growing concern, the ANA issued seven strategic recommendations that can be adopted by advertisers to do a better job of protecting themselves against non-transparent business practices and, ultimately, improving their overall relationships with media buying agencies. The recent controversy with tech giant Facebook vastly overestimating average viewing time (inflated 60% to 80%) for video ads on its platform for the past two years, and the absence of third-party tagging and verification on its platform, contribute to trust issues.

- Based on the ANA "**Media Transparency: Prescriptions, Principles, and Processes for Advertisers**," there are seven key recommendations for advertisers: 1) Agent versus principal (preferably act as an agent for a disclosed principal when dealing with third parties on the advertiser's behalf). 2) Contract content (including robust provisions to deliver full transparency). 3) Contract audit rights (allowing client to fully track contract compliance and measure media-value delivery). 4) Contract governance (disciplined internal processes and management oversight). 5) Data and technology (taking ownership of data and exert control over the media technology used). 6) Advertiser responsibilities (active stewardship of media investments and fair compensation). 7) Code of conduct (establish a culture of trust).
- Considering the importance of achieving fairness and transparency in media contracts, 4A's President-CEO Nancy Hill informed the membership that the group's **Transparency Guiding Principles of Conduct** are now a standard practice for membership rather than a recommendation.
- **Coca-Cola** won an Association of National Advertisers' Multicultural Excellence Award for its Hispanic heritage version of the "Share a Coke" campaign. The campaign featured temporary tattoos of Hispanic surnames that consumers could apply to their bodies using condensation from the cans.
- **Apple** entered the search advertising business by starting to show ads related to users' searches in its App Store.

- Per Trusted Media Brands, 42% of marketers and 65% of agencies are planning to increase their **digital video** budget. In addition, 62% of agencies picked video platforms (YouTube, Vevo, etc.) as their preferred method of distribution, while 65% of marketers prefer social platforms (Facebook, Snapchat, etc.). And 45% of advertisers plan to increase branded video content, followed by pre/mid/post roll and in-video banners. Short form content is the most popular choice for video content: 41% will be running short form video content compared to 25% for long form content.
- **Twitter** lets brands sponsor Periscope livestreams, starting with Chase and Grey Goose. Through Twitter's Amplify program, brand partners can now sponsor a series of Periscope broadcasts and create branded video highlights, which can feature pre-roll ads.
- **Pinterest** reaches 150 million monthly users: 70 million in the U.S. and 80 million international.
- A must see: In **Inside Impact: The Return, UNIT9 VR** created a powerful 360 VR experience, allowing viewers to explore the day-to-day life of Annapoorna, one of ChildFund's sponsored children.
- A new study from Weber Shandwick finds that most CMOs in five global markets believe **artificial intelligence** will surpass social media's influence in the industry.
- Commonwealth/McCann and The Martin Agency hired **IBM's Watson** for Chevrolet's latest push, "Fueling Possibilities," a campaign where consumers' social media accounts are analyzed to measure their positive impact on the world.
- Noteworthy quotes:
 - » "In the last two years, we've created approximately 2,500 pieces of marketing content a year. This year, we will create roughly 5,000 pieces of marketing content, so we're making more content but we're also challenging ourselves to make our content much more valuable to our customers." Deborah Wahl, CMO, **McDonald's**
 - » "Brand building is not rocket science. We came up with the idea of the creative canvas to talk about what your brand does. We went brand by brand and raised the bar and didn't accept mediocrity. That had to cascade to agencies and suppliers. The agencies want to do great work and we provided more clarity and asked for the best work." Marc Pritchard, chief brand officer, **P&G**
 - » "Maintaining user trust must still be the most important takeaway when developing content. While the monetization opportunity is clear, it should not come at the expense of user experience — or, even worse, the sacrifice of editorial credibility." Rich Routman, president, **Minute Media**
 - » "Creative disintermediation is a very significant threat. These types of firms are moving up in the food chain and are putting together yearlong plans." John Boiler, chief executive officer, **72andSunny**

Financials – driving efficient use of resources

Media spend is on the rise worldwide fueled by the upcoming U.S. presidential elections, accounting for \$7.5 billion, and the Rio 2016 Olympics, yet many advertisers still struggle to find the right advertising mix. It's not stopping large advertisers including Unilever to use a zero-based budgeting approach. Digital spend continues to rise in most places, with online ad investment in the U.S. to surpass TV by the end of this year. Illustrative to this point, digital now represents 54% of Publicis Groupe's revenue, on track for the group's target of 60% by 2018. Brands like L'Oréal doubled the portion of their marketing budget dedicated to digital media (for L'Oréal, from less than 15% in 2013 to 30% this year).

- **Agency-brand relationships are changing.** According to Agency Spotter, the average annual deal between brands and creative agencies is \$20 million, with projects ranging from \$50,000 to \$250,000. In addition, 30% of brands say they typically hire a partner within two to three months, 31% within a month, and 39% within four or more months. The average agency of record relationship lasts less than three years.
- Per TrinityP3's Darren Woolley, the seven key considerations when **moving from agency retainer to project fees** include agency loss of cash flow, incomplete scopes of work, increased costs, seasonal peaks, loss of agency commitment, project payment terms and increased administration.
- **FanDuel** and **DraftKings** to pay \$6 million each amid a false advertising claim, making it appear novice players had a realistic shot at scoring big when most players lose money over time against professional players who often used automated computer scripts and sophisticated statistical tools.
- Advertisers and brands are estimated to spend \$22.65 billion on emotion **detection and recognition technology** by 2020, per MarketsandMarkets. Brands such as MasterCard, IBM and General Electric evoke emotions through their marketing to resonate with customers. Based on an analysis of 1,400 successful ad campaigns, the study reveals that emotional content performed approximately twice as well (31% versus 16%) as rational content.
- Per Carat: **Media spend** to hit \$204.8 billion in the U.S. in 2016, a 5% increase from 2015. Worldwide media spending will hit \$548.2 billion this year, up 4.4%, and it is expected to reach \$570.4 billion next year, a 4% gain. Digital is the fastest growing segment of advertising, fueled by spend in mobile, video and social media (15.6% growth this year and 13.6% in 2017). In addition, digital will be the number one ad medium by revenue this year in 13 of 59 markets. TV will still lead globally in 2017, accounting for 40.3% of media spending versus 30.2% for digital. Digital ad spend in the U.S. is expected to hit \$56.8 billion in 2016, representing 27.8% of ad spending. Digital, video and mobile ad spend all grew between 45% and 50% in the U.S. in 2016. Influencer marketing is expected to become a \$5 billion to \$10 billion market in the next five years.

- Per eMarketer, **online ad investment in the U.S.** will surpass TV by the end of 2016, hitting \$72.09 billion compared to television's \$71.29 billion. Digital ad spend is to account for 36.8% of total U.S. media compared to 36.4% for TV, driven by several factors, but mostly mobile and video. By 2019, mobile will represent more than a third of total media ad spending in the U.S.
- **Uncertainty about having the right advertising mix:** Per Millward Brown Digital, only 32% of marketers think they are hitting the right marketing balance, with half saying they aren't confident about their brand's media blend. The most popular choice to have in the marketing mix is traditional advertising at 16%, followed by website and search, both at 13%.
- According to STRATA, agencies report that 49% of clients are **reducing their budgets**, and 31% are maintaining them at the same level. More than two-thirds of agencies report that they are devoting 6% to 25% of their budgets on paid social. The percentage of agencies anticipating the need to reduce staff rose by 84% compared to the prior quarter. The leading concern for a majority of agencies (26%) was attracting clients, followed by media mix (21%).
- Noteworthy quotes:
 - » "Short-term thinking is all about cost and it encourages zero based growth in budgeting. At the same time, you have research showing that CMOs just last two or three years now and CEOs just a little longer. So there's far too much short-term thinking and focus on cost, which isn't healthy for our industry." Sir Martin Sorrell, CEO, **WPP**
 - » "To follow the money nowadays, you don't need a generalist anymore; you need a proctologist." Ron Amram, vice president of media marketing, **Heineken USA**
 - » "The huge holding companies like WPP, Omnicom, Publics, IPG and Havas all have teams of contract specialists whose jobs are to help the agencies get the most favorable contractual terms. These teams consist of lawyers who collectively have visibility into hundreds and perhaps thousands of advertiser/agency agreements." Bill Duggan, group EVP, **Association of National Advertisers**

Performance – driving stronger value from the partnership

- Are brand advertisers satisfied with the performance they are getting from their agencies? Apparently not. While 66% of advertisers plan creative agency reviews, 65% plan to review search agencies, 64% will review media agencies and 61% are ready to review digital agencies. In addition, 48% of advertisers claimed their agencies were not open and transparent on costs, and 34% said they were losing trust in their agencies as a result; 48% said their companies do not give agencies meaningful key performance indicators (KPIs) that could help them be successful.
- **MDC Partners' Anomaly** is not only helping to launch a new cannabis products company (named Hmbltd), but also took a partnership stake in the company, indicating that more agencies are now seeking new ways to drive growth beyond traditional agency services.
 - The Association of National Advertisers (ANA) called for FB metrics to be audited and accredited by the **Media Rating Council (MRC)** because of FB's recent miscalculation in "average duration of video viewed."
 - Per Duke University's CMO Survey, 44% of CMOs say they're still unable to quantify **social media's** effect on their bottom line. However, CMOs still plan to double the proportion of budgets devoted to social media marketing on average, to 22.2% over the next five years.
 - Japanese ad giant **Dentsu Inc.** admitted overcharging at least 111 companies for internet ads, following a complaint from Toyota Motor Corp. Dentsu apologized and blamed overworked employees for the overbilling.
 - The **Coalition for Better Ads**, a new group founded by the Association of National Advertisers, the Interactive Advertising Bureau, the 4As, Facebook, Procter & Gamble, Google, GroupM, The Washington Post and Unilever, is set to improve online advertising by monitoring quality. Only ads that make it through the filter will be displayed on the websites of participating companies.
 - Lego is encouraging **user-generated content**. The brand is generating 20 times less content than fans are creating. Examples include the Lego Ideas page, which invites people to propose their own ideas for new Lego sets, and the \$100 challenge, \$100 worth of Legos to re-create a Lego figurine and taking pictures with him against different backgrounds all around the world.
 - A report from BBDO found that 97% of major brands utilize **organic posts on Facebook** as a social strategy, and 80% of those posts aren't accompanied by paid media. Unmetric found that only 3% of brands with most engagements were promoting 80% or more of their Facebook posts.

- Winners of the **ANA Genius Awards**, which recognize companies that are leading the way in applying analytics to prove the value of marketing and make sense of Big Data for business impact: The Clorox Company in analytics adoption, Hilton Worldwide in analytics impact, Syngenta in analytics innovation and Turner in analytics science.
- According to The Wall Street Journal and a report by The Bedford Group, the **average client-agency relationship** in 1984 lasted 7.2 years compared to less than three years, which is now common practice.
- According to Ron Fierman, president of Digital Pulp, a NYC digital agency, there are five steps for **improving the agency search process**: 1) Narrow your options. 2) Make the actual RFP count. 3) Have a budget. 4) Set a precedent of courtesy and communication. 5) Give the presentations time and space to sink in.
- Tequila marketer **Patron Spirits International** sued its former digital shop Reindeer, alleging it is violating trademark law by continuing to promote Patron as a client on its website, even though the relationship was terminated in 2014.
- More than 20% of **Facebook's** 4 million advertisers (1 million advertisers added in less than seven months) have created a video ad in the past month, and 40% have created an ad using a phone or tablet.
- Noteworthy quotes:
 - » "It's also the client's fault, who keeps everybody in constant pitch mode. I cannot realistically put people head-to-head over and over again and then expect them to work together effectively." Diego Scotti, CMO, **Verizon**
 - » "A partnership feels so much more open. ... It's a sign that we are more than an advertising agency and we are bringing more to [the relationship]." Andrew Bruce, CEO, **Publicis Communications North America**
 - » "Frankly, your complexity should not be our problem, so we want you to make that complexity invisible." Marc Pritchard, global brand officer, **Procter & Gamble**
 - » "Smart marketers greatly increase their chances of breakthrough work through co-creation of their agency ecosystem, clarified roles and responsibilities, and selection of agencies that are adaptable enough to lead and succeed in a constantly evolving world." Bryan Wiener, executive chairman, **360i**

Agency Reviews and Roster Changes

Disclaimer: The reviews listed often capture larger review activity reported in the industry trade press, which we understand to be only a subset of total review activity. Specialist reviews (digital, social, PR, etc.) are rarely reported in the trade press. Also, due to the increasing number of project reviews (versus AOR/retainer reviews), many of those are not receiving media attention and therefore are not included here.

- **USAA** hired a Publicis Groupe team, which includes Razorfish, Saatchi & Saatchi, MSLGroup, Mediavest|Spark and Prodigious, to handle integrated marketing, media, creative and content development, social media, corporate responsibility, PR and crisis management following a holding company review. The new agency will replace various incumbent IPG agencies including MullenLowe, Initiative, Fleishman Hillard and Merkle, which the brand has worked with over the past eight years.
- **Ferrero Chocolates** selected TMW Unlimited to serve as one of its digital and social media shops, following a review, replacing incumbent Pablo, which will continue work on the account alongside creative shop Haygarth.
- **Coty** selected Publicis Media with Zenith taking the lead globally to handle all of the Procter & Gamble brands that are joining Coty as well, following a review. This decision follows a similar win by Zenith to handle the consolidated Coty media business a year ago.
- Giant food marketer **General Mills** named MDC Partners' 72andSunny and Redscout as its primary U.S. creative agency partners. The U.S. creative review included agencies not on its roster, Deutsch and Mother, and incumbents 72andSunny, Saatchi & Saatchi and McCann. The brand held "creative salon," 90-minute meetings that were part of the chemistry check. McCann still handles Cereal Partners Worldwide globally.
- Berkshire Hathaway's **Duracell** hired Wieden+Kennedy as its new AOR, replacing incumbent Anomaly, which had held the position since 2014.
- **General Motors** launched a creative review, inviting multiple agencies to participate in an RFP to develop advertising strategies for the brand. Incumbents Publicis Groupe's Leo Burnett and Digitas will participate in the review. Burnett and DigitasLBI combined their Detroit operations to form a new unit called Engage M-1 to service both the GMC and Buick brands. GM's Buick line is not under review.
- Spirits giant **Diageo** selected Dentsu Aegis to handle global planning and buying. WPP's Mindshare will oversee India and South Africa, while Publicis Groupe's Mediavest will handle Australia. The brand had been working with four global networks, including Dentsu Aegis' Carat in the U.S. and the U.K.

- Fast-food chain **KFC** kicked off a media agency review for the media planning and buying responsibilities of its general-market business in the U.S., including digital and social media. Nearly 10-year incumbent agency MEC will not participate.
- **Heineken's Strongbow Cider** named Dentsu's 360i digital agency of record following a review, replacing incumbent lead agency Droga5. Cloud Factory remains lead creative, Interpublic's Current as AOR for PR, replacing Edelman. The agency continues to handle Heineken, Dos Equis, Amstel and Heineken USA corporate PR.
- DDB is no longer the AOR for the **Fiat Chrysler** brand Alfa Romeo in North America but continues as lead AOR for the Jeep brand. FCA's roster agencies include FCB, Chicago; GSD&M; Richards Group; Doner; and Iris Worldwide. The brand is looking for a new agency for the Chrysler brand, replacing incumbent Wieden+Kennedy.
- **Fast food giant McDonald's** hired Omnicom to put together a multidisciplinary including digital shop Critical Mass, Omnicom Media Group, multicultural shop Alma, and boutique agency Sparks & Honey. Incumbent agency of 35 years, Leo Burnett, lost an estimated \$1 billion account or about 7% of the agency's revenue.
- **Beam Suntory** kicked off a global creative agency review for its flagship Jim Beam bourbon brand. The brand is currently handled by a consortium of agencies from three countries known as StoryWorks: Mekanism from the U.S.; The Works from Australia; and Jung von Matt of Germany. Mekanism is not participating in the review.
- **Avon** hired Horizon Media as agency-of-record for offline media and activation in the U.S. following a review. Avon recently hired Terri & Sandy as its creative AOR.
- **MTV** kicked off a search for creative and media agencies. Fallon is the brand's incumbent media agency.
- **New Balance** selected VML as its global creative agency, following a review, replacing incumbent Arnold, the global creative AOR since 2010.
- Food chain **Subway** hired back former incumbent MMB, moving away from BBDO, no longer Subway's lead agency. BBDO became AOR for the brand a year prior.
- **Walmart** consolidated its \$900 million U.S. media assignment with Haworth Marketing + Media, replacing incumbent Publicis Groupe's Mediavest, its North American media AOR for nine years.
- **Bob Evans Farms'** grocery products division, BEF Foods, hired McCann Detroit as its creative and shopper marketing agency following a review. The brand also named IPG Mediabrands' UM as its media buying agency of record.
- **Coca Cola Co.** is looking for a new agency for Diet Coke after recently cutting ties with Droga5.
- **Pepsi** hired Firstborn as digital creative AOR, replacing incumbent Cheil Worldwide-owned Barbarian Group, and will handle social media in-house via its new content studio in Manhattan.
- **La Quinta Inns & Suites** selected Horizon Media as its media AOR, handling communications planning and paid media activations across all channels for La Quinta's portfolio, following a competitive review.
- Electronics giant **Samsung Electronics** kicked off a pan-European pitch to hire a lead European agency to achieve greater creative consistency. Current agencies include Leo Burnett, Wieden+Kennedy, Bartle Bogle Hegarty, 72andSunny, CHI & Partners, and Cheil Worldwide (18% owned by Samsung).
- **Qualcomm** consolidated its international and U.S. creative work under McCann following a review, replacing incumbent agencies Ogilvy (since 2012- international) and DDB (since 2013 - US).
- **Electrolux** hired VML as its lead creative and digital agency in North America for its Electrolux and Frigidaire brands, following a competitive review. The agency will handle brand advertising, digital, media, public relations, CRM and in-store marketing. It will pull together a WPP team including Geometry for brand activation and in-store, MediaCom for media planning and buying, and Cohn & Wolfe for PR, replacing incumbent agencies DDB (creative/digital AOR for the past 10 years), Weber Shandwick (PR AOR for the past 12 years), and Zenith Media (media AOR for the last two years).
- **Pernod Ricard** appointed Bartle Bogle Hegarty (BBH) London as lead creative global agency for Absolut Vodka following a pitch, replacing four-year incumbent Sid Lee. Sid Lee did not participate in the review.
- Home-shopping network **QVC** is launching a review of its global media planning and buying business. The review is held at a holding company level. The appointed agency will also oversee the U.K., France, Italy, Germany and Japan.
- Household goods conglomerate **Church & Dwight** hired iCrossing and Razorfish to handle digital strategy, search, social media and data/consumer insights following a review. Razorfish will handle Trojan, First Response, Batiste, RePhresh and Replens, while iCrossing (Hearst Media) will work on Oxiclean, VitaFusion, Li'l Critters, Nair and Oragel.
- **Molson Coors Brewing Co.** began a request for proposal process to assess its media agencies in the U.S., Canada and the U.K. The brand is looking for breakthrough media planning and superior buying effectiveness, as well as strong capabilities in research, analytics and reporting.
- **Mattel** is reviewing its \$150 million U.S. media planning and buying account, challenging Publicis Groupe's Starcom and WPP's MindShare, which are incumbent agencies for media planning and buying respectively

Agency Roster Summary

Client	Incumbent	Scope	New Agency	Review
Avon		Media	Horizon Media	Y
Beam Suntory's Jim Beam	Mekansim	Creative	TBD	Y
Bob Evans Farms Food		Creative	McCann	Y
Bob Evans Farms Food		Media	UM	Y
Church & Dwight		Digital	iCrossing/Razorfish	Y
Coca-Cola Co.	Droga5	Creative	TBD	Y
Coty	Zenith	Media	Zenith/Publicis Media	Y
Diageo	Carat	Media	Aegis Network	Y
Duracell	Anomaly	Integrated	Wieden + Kennedy	Y
Electrolux	Various	Creative	VML	Y
Ferrero Chocolates	Pablo	Digital	TWM Unlimited	Y
Fiat Chrysler Automobile	Wieden + Kennedy	Creative	TBD	
General Mills	Various (72andSunny, Saatchi & Saatchi and McCann)	Creative	Redscout	Y
General Mills	Various (72andSunny, Saatchi & Saatchi and McCann)	Creative	72andSunny	Y
General Motors	Leo Burnett & Digitas	Creative	TBD	Y
Heineken's Strongbow Cider	Droga5	Digital	360i	Y
KFC	MEC	Media	TBD	Y
La Quinta Inns & Suites		Media	Horizon Media	Y
Mattel	Starcom Mediavest & Mindshare	Media	TBD	Y
Molson Coors Brewing		Media	TBD	Y
MTV	Fallon Worldwide	Integrated	TBD	Y
New Balance	Arnold	Creative	VML	Y
PepsiCo	Barbarian Group	Digital Creative	Firstborn	N
Pernod Ricard	Sid Lee	Creative	Bartle Bogle Hegarty	Y
Qualcomm	Ogilvy & DDB	Creative	McCann	Y
QVC		Media	TBD	Y
Samsung	Various	Creative	Various	Y
Subway	BBDO Worldwide	Creative	MMB	Y
USAA	Campbell Ewald	Integrated	Publicis Groupe Team	Y
Walmart	MediaVest	Media	Haworth Marketing Media	N

Disclaimer: The AMS Monthly Industry Update is a summary and analysis of newsworthy agency/client developments picked up in recent trade related publications and news media. This information is provided for informational and educational purposes only. Agency Mania Solutions believes the information has been obtained from a vast number of sources considered to be reliable, but does not guarantee the accuracy of the information provided.

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What Will Make You a Kick-Ass Client?

What great clients do to turn their agencies into powerful growth engines.



Le Divorce.

Committing to reciprocal feedback before making agency review decisions.



Admit it: We Are All Maniacs!

Four common myths that keep even the best advertisers from turning the mania of client/agency relationships into screaming brilliance.



This Piece of Cardboard Will Take You Halfway Around the World.

How the winner of the Mobile Grand Prix Cannes Lions signals the supremacy of content and the slow death of traditional advertising.



Will You Marry Me for Just One Night?

Ending the mania of endless client/agency reviews and increasingly popular "speed relationships" that undermine great work and sustained performance.



Are Your Briefs Tight Enough?

How effective briefing ensures clients get better work from their agencies.