

Industry Update

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

Volume 18

Executive Summary – Monthly Recap

Goodbye 2016 and a holiday season that produced close to \$637 billion, the biggest increase since 2005 and a 15% gain in online sales. The Association of National Advertisers' members have chosen "transparency" as 2016's word of the year. But that was then and this is now. Hold on ... wait. The recent Justice Department investigation into production practices of major holding companies is putting the spotlight on concerns raised that agencies are increasingly conducting bad faith bidding processes for production assignments, favoring in-house capabilities, and failing to disclose mandated quotas or details pertaining to their ownership of production facilities. Transparency might be the topic du jour for a while longer. Welcome to 2017. By now, most of us have been bombarded with prediction articles about what to expect in the next 12 months, ranging from video everywhere, the importance of attribution, the rise of predictable analytics, the role of influencer marketing and the growing use of marketing technology, among many others. If the past is a good indicator of the future, then we have noticed some hardwired trends that will impact the way advertisers work with agencies this year and beyond.



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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

According to industry sources, there have been 430 accounts in review in the first nine months of 2016 (January-September), a 38% increase YOY. Media reviews (traditional and digital) represent 24% of the total, but an 11% increase YOY. Only 14% of these reviews are being reported as handled by search consultants, a 3% reduction YOY. Many of these reviews are driven by a client's desire to consolidate agency relationships. Another example of consolidation is with Auto maker Toyota Motor moving to a single, integrated agency partner for all marketing, digital and media activities across Europe. Like the big holding companies, London-based The&Partnership has increasingly been signing up new clients by setting up bespoke agency models that bring together multiple services into one bottom line.

- **Netflix** wins Ad Age's Marketer of the Year award. Netflix has become adept at promoting a variety of shows through content that goes viral, encouraging users to participate with their own GIFs and memes, efforts that earned the award. Other A-list marketers: Dr Pepper Snapple Group, FX, Intel, KFC, Adidas, Pokemon, L'Oreal, American Eagle, Snapchat and Mattel. Other unusual names: ANA, Girl Scouts, Donald Trump and Marijuana.
- Two years ago, 96% of Intel's work was done with external agencies. Since then Intel has been moving work in-house to gain quality, better brand alignment and cost efficiencies, creating an in-house agency called **Agency Inside**. Intel recently opened an office in San Francisco to attract key talent.
- Publicis Groupe's **Publicis.Sapient** merged the digital agencies SapientNitro and Razorfish to create the new global entity SapientRazorfish. The agency, which includes about 12,000 staffers worldwide, will operate under one P&L. The restructuring is part of Publicis Groupe's Power of One integrated approach. Digital now represents 54% of group revenue, on track for the group's target of 60% by 2018.
- Many agencies built out their own production and postproduction capabilities to offset fee pressure by growing revenue in adjacent areas, meeting shorter timelines and growing interest for video advertising. The **U.S. Justice Department** is investigating whether agencies rigged the often-murky bidding process to steer business to their own video-advertising production units instead of independent companies, practicing various price-fixing or

other bid-rigging activities. Subsidiaries within the world's biggest ad holding companies have been subpoenaed. It is an estimated \$5 billion business in the U.S.

- Publishers are increasingly competing with ad agencies with **branded content**: The Wall Street Journal's WSJ Custom Studios, Time Inc.'s The Foundry, The Washington Post's BrandStudio and The New York Times' T Brand Studio are all successful examples of new ad agency-type service offerings developing digital branded content for brands. Traditional agencies are "frenemies" as they can be partners, competitors or clients.
- MDC Media Partners launched an AI-focused agency called **Born**, which brings together creativity and tech and goes after a market estimated at \$643.7 million. The agency will operate with its own P&L, similar to other MDC agencies.
- Former Droga5 employees Matthew Gardner and Erik Hogfeldt are kicking off new agency **Highfield** with a campaign for Swedish clothing company GANT.
- **Forrester** evaluated the lead agency capabilities of top agencies in Q4 2016 — 360i, Barkley, Havas Worldwide, Hill Holliday, mcgarrybowen, Publicis NA, R/GA and VML. Agencies 360i, VML and R/GA emerged as leaders with demonstrated commitment to post-digital marketing with data-driven insights, brand experience capabilities, collaborative leadership processes and a purpose-driven culture.
- **Snap** acquired an ad tech company called Flite, a creative management platform that enables high-quality creative and "the ability to launch, manage, measure and optimize digital ad campaigns in real time.
- **Y&R North America** won new accounts over the past three months: U.S. Census Bureau awarded Y&R with its largest integrated communications contract for the first-ever digital Census in 2020. In partnership with VML, the agency won the corporate JP Morgan Chase & Co. account and became lead creative agency for Cirque du Soleil.
- Winners of the **2016 IHAF Awards**, which recognize creative excellence among in-house agencies across a host of print and digital categories: Best of Show — Advertising Print B2C - Liberty Mutual Group - Safeco Extended Warranty; Gold Winner — VCU - Virginia Commonwealth University Annual Report; Silver Winner — DIRECTV - Advertising banners - MLB Extra Innings Banner; Honorary Mention Winner — DIRECTV - Advertising banners - NFL Sunday Ticket Banner.
- **Adobe** acquired video advertising company TubeMogul for \$540 million to enhance its Adobe Marketing Cloud by adding a demand-side platform capability. The solution is promising a media-neutral, data-rich alternative to Google/Facebook for advertisers looking to execute ad buys with transparency while leveraging the power of programmatic.
- **Instagram** doubled its user base in the past two years and has increased users by 20% in the past six months alone, growing from 500 million to 600 million monthly active users.
- 43% of **agencies expect increased business** in the first quarter of next year, and 42% are planning to recruit more staff, according to a survey by Strata. Only 11% expect a decrease in business. Not a single agency reports plans to reduce staff sizes. The biggest challenges ahead: 51% stated expanding their client roster, followed by determining the right media mix (22%) and client retention (13%).
- Integration of media and creative remains key. **Havas** created a group chairman position for each of its largest four territories to spur closer collaboration between its media and creative units.
- Omnicom launched a dedicated McDonald's agency, now formally called "**We Are Unlimited**," to handle the McDonald's U.S. creative business, marking the end of the 35-year relationship with Publicis' Leo Burnett in the U.S. "We Are Unlimited" is composed of 200 staffers, including individuals from The Marketing Store (TMS), Facebook, Google, Twitter, Adobe, The New York Times' T Brand Studio and others.
- Noteworthy quotes:
 - » "This scenario is 180 degrees from that – this alleges agencies are setting this up to bolster their own in-house production opportunities. That's an entirely different game. If that's really what's going on with how agencies are growing in-house operations, that's a grave concern." Matt Miller, president and CEO, **Association of Independent Commercial Producers (AICP)**
 - » "I have instant and constant access to the business. When you work in an external agency, you don't. ... It is really nice to have constant access to the business, our clients and the technology — I think that doesn't exist when you're outside." Teresa Herd, VP global creative director, **Intel**
 - » "Everyone wants to be a partner, they just don't want to deal with the 'ship,' the partnership." Roy Spence, chairman, **GSD&M**
 - » "Over the course of the past year and a half, after I developed the structure of the agency, I've been bringing different parts of the work in-house. We started with social and digital, as well as a lot of the actual brand work that we do. I'd say today, probably 65 to 70 percent of the work is done in-house, and the rest we continue to use external agencies to divide it up." Teresa Herd, VP global creative director, **Intel**

Work – producing great work and outcomes

There is no doubt that producing great work has never been more challenging (faster, better, cheaper), with more moving parts and dependencies (internally and externally). What should you expect in 2017? Serial entrepreneur John Rampton proposed **five trends** CMOs must have a better grip on in 2017: 1) Cross-departmental content collaboration, 2) Putting account-based marketing into practice, 3) Revenue visibility for “the new CMO,” 4) Finding and securing top marketing talent and 5) Investing in trust.

- According to TrinityP3, following are the **major predictions for 2017**. In Marketing: 1) The rise of the (truly) integrated marketing department. 2) The unfortunate failure of zero based budgeting for marketing. 3) CEOs and boards will start to ask for results, not the latest fad. In Media: 1) Media transparency. 2) Increased scrutiny on the trading desk. 3) The media-advertiser infusion. 4) Nothing much changes in media transparency. 5) Media verification and measurement. 6) Channel planning will make a big comeback. In Agencies: 1) Big consultancies continue to expand into the agency market. 2) The continued growth of full service agencies. 3) Reinventing the advertising production process. 4) Cannes will explode with client frustration.
- **Amazon-owned Twitch** (available through the company's new video content platform, SureStream) is offering in-stream spots for its content partners that, once enabled, will bypass third-party ad and content blockers.
- **Amazon Alexa** recently announced its Germany and U.K. launch, as well as reaching 4,000 skills in the Alexa Skills Store. AdWeek reported that Amazon sold more than 3 million Echo devices since they launched in late 2014.
- **Fiat Chrysler Automobiles** launched a 360 video titled “A Whole New Spin,” which aims to demonstrate the all-wheel-drive system of the Fiat 500X crossover in a campaign created with FCB Chicago. The video allows the viewer to follow the Fiat 500X through four unique environments: beach, forest, city and snow.
- The Trustworthy Accountability Group awarded its first **“Certified Against Fraud” standard** to 16 companies, including Amobee, ComScore, DoubleVerify, Dstillery, Google, WPP's GroupM, Horizon Media, Integral Ad Science, Moat, Omnicom Group, OpenX, ProData Media, Rocket Fuel, Sovrn, Interpublic Group and WhiteOps. About \$7.2 billion is expected to be lost globally from ad fraud in 2016.
- BBDO New York has revamped 300 **Foot Locker** stores, turning them into sneaker museums that include audio tours from celebrities and NBA players that are triggered by a code on sneaker displays or via the brand's app.

• Noteworthy quotes:

- » “Doing what's expected of you is not enough.” Brent Choi, chief creative officer, **J. Walter Thompson**
- » “In the agency world, though, our clients tend to buy the stuff our people produce. The what is more important than the who. Unfortunately, because much of what agencies produce has been commoditized, clients have squeezed agencies on costs. This has driven profit margins down and pitted agencies against one another in a ‘how low can you go?’ game that doesn't have a winner.” Steve Radick, VP, director of PR and content integration, **Brunnerworks**
- » “We continue to see digital, social and mobile as an important part of the go-to-market mix. Our content will continue to showcase innovations through those channels. You'll see us exploring Internet of Things with payments. You've got exciting experiences like the connected car where you are in your car and you can make a seamless payment. We work with our financial institutions, the device manufacturers, the tech companies, and then have this content embedded in that — bracelets, rings — that we can showcase through our digital channels.” Lara Balazs, senior VP-North America marketing, **Visa**
- » “The issue of spec work is polarizing within the industry. ... Many agencies refuse to do it in many circumstances. A lot of agencies will do it but they don't think it's appropriate, and then there are some agencies who, for significant pieces of business, think it's a good part of the process for various reasons.” Tom Finneran, EVP of agency management services, **The 4A's**
- » “It only gives you a point-in-time view of an agency's creative capability. The creative work that's done for a pitch is usually done in a very short period of time, and often the agency chooses a team to work on a pitch that happens to be available, which might not be the team that you would have working with your brand on an ongoing basis.” Debra Giampoli, global director of strategic agency relations, **Mondelēz**

Financials – driving efficient use of resources

The holiday season is often when most records are broken and this year was not disappointing. If marketers are spending more budget in digital media, it's essentially due to the fact that consumers are spending increasingly more time and paying greater attention to digital channels and eCommerce. For example, Alibaba's annual online shopping festival, called Singles Day or Double 11, has grown into the world's biggest shopping day with 11,000 foreign brands participating, generating \$17.8 billion in transactions in 24 hours. Enough said?

- IPG Mediabrands' Magna expects **digital ad sales** to become the No. 1 media category in 2017 with a market share of 40%, pulling in \$202 billion worldwide. In

comparison, linear TV ad sales will bring in \$186 billion next year and have a 36% market share. However, WPP's GroupM expects TV to remain dominant, predicting that it will hold 41% of the global pie in 2017, while digital ad sales will rise to 33%.

- **Google** reported that the number of video ad impressions served monthly through programmatic direct on its platforms have doubled from January through September 2016. The number of programmatic direct deals by retail advertisers executed on its DoubleClick Ad Exchange is expected to grow rapidly.
- According to IAB, advertisers spent more than \$50 billion in **digital marketing** through the first three quarters of 2016 (including display, social, video and search advertising) — a new record — and it looks likely to surpass 2015's total of \$59.6 billion by year's end. Digital-advertising spend hit \$17.6 billion in the third quarter, a YOY rise of 20%. Mobile represented 47% of all digital ad spending.
- The United States is home to 46 of the world's top 100 advertisers, followed by Japan (12), Germany (10) and France (10). The top 100 spent \$240.5 billion on advertising in 2015. The world's largest advertisers are 1) Procter & Gamble Co., 2) Unilever, 3) L'Oréal, 4) Volkswagen and 5) Comcast Corp.
- **WPP** has revealed that it will invest at least \$5 billion of client budgets in Google ads this year or \$1 billion more than 2015. WPP spent \$1 billion in 2015 with Facebook. WPP disclosed FY'16 spending of \$70 million with Snap.
- WPP beat analysts' expectations for its third quarter, with reported revenue jumping 23.4% to £3.61 billion (\$4.7 billion) with the gains due to a weak pound, concerns over Brexit and with organic revenue growth (excluding acquisitions) of 3.2%. On a constant currency basis, revenues rose 7.6%.
- **Programmatic** is expected to be the quickest-growing online advertising channel in 2017, increasing by 31%, according to Zenith. It is projected to account for 58% of total digital ad spend this year.
- Per Exane BNP Paribas, newer forms of media have a much higher percentage of **non-working costs**: traditional media non-working spending is approximately 12% of the total, display (e.g., banners) 15% to 20%, and mobile and social goes up to 60%.
- Per Tim Williams, founding partner at Ignition Consulting Group, states that close to 12% of an agency's gross revenues are spent supporting the timesheet system. Williams recently wrote an **"Obituary for the Billable Hour,"** citing a long list of symptoms, including the fact that a billable hour model misaligns the interests of the professional and the client — the firm wants more of (hours), the client wants less of.
- Nearly half of marketers in the U.S. plan to ramp up budget for **influencer-focused campaigns** in 2017. eMarketer estimates that influencer marketing revenues worldwide on Instagram alone will total more than \$570 million in 2016, suggesting that influencer marketing is a multibillion-dollar industry.

- Per Gartner's CMO Survey for 2016–2017, **marketing budgets** have risen for the third year in a row, increasing from 11% last year to 12% of company revenue. As CMOs become more accountable for driving and measuring success, over 69% of marketers now expect their decisions to be quantitatively driven by 2017.
- An infographic by **Forrester Research** shows 89% of marketers buy ad space in social media as part of their investment mix. The study found 50% of advertisers view lack of transparency in media buy practices as a problem.
- Noteworthy quotes:
 - » "There is increasing attention to audits. The issue is not a U.S. issue. ... I don't want to say 'I told you so,' but I do want to say 'I told you so.' We said that there are no rebate issues in the U.S. If you want to deal with problems, work with us to do something about Japan and the Middle East where there is even less transparency." Martin Sorrell, CEO, **WPP**

Performance – driving stronger value from the partnership

A CMO Council report entitled "Connected Interaction to Power Brand Attraction" finds brands struggling to manage marketing's multiple channels, with only 6% claiming successful alignment of digital and physical touchpoints and experiences. A poor understanding of the connected customer journey across all touchpoints is believed to be hindering the omni-channel experience. Having the right measurements in place becomes critical. Performance data is a fundamental resource for brands looking to make better decisions and improve the performance of their work. Client-side marketers also rely on data to guide agency relationships at least some of the time, according to a new ANA report. Use of data for managing agency relationships delivers strong outcomes: 82% of respondents see it contributing to better overall client/agency relationships; 90% see it improving agency efficiencies; 78% see it improving internal efficiencies at the client's organization.

- Pressure is growing for **third-party validation** for digital media. Unilever CMO Keith Weed called on digital media companies, including Facebook and Google, to provide what he calls the "3Vs" — viewability, verification and value.
- The **Google Unskippable Labs** ran the experiment using 16 different videos. Key findings: 1) Pacing (faster version led to a view-through rate of 35% on mobile, while the slower version had a 29% view-through rate). 2) Vertical video (horizontal video had a 29% view-through rate on mobile, and the vertical had a 27% view-through rate) 3) Captions on and off (subtitled video performed slightly better with a 23% view-through rate on mobile versus a 22% rate for the non-subtitle video).

- Per research from ListenFirst Media, the top **five most engaging videos on YouTube** this year were largely narrative-oriented, and used humor, excitement, inspiration and family to engage viewers. Most viral brands/campaigns: 1) Domino's Pizza (Domino's DXP — Extra Mile). 2) Geico (Going Up: Fast Forward). 3) Walmart (Easter Surprise | Jelly Bean Garden). 4) Nike (Unlimited You). 5) Gillette (Perfect Isn't Pretty | Rio 2016 Olympic Games | Sia Unstoppable).
- One of the world's largest chocolate producers, U.K.-based **Cadbury** reached 65% click-through rate and 33% conversion rate with a personalized video integrated campaign. 90% of viewers watched their personalized video to the end. The brand adopted an approach that utilized the Facebook profiles of their customers as a source of data.
- Per Jerrid Grimm, the co-founder of Pressboard, the **10 best branded content partnerships** of 2016: 1) The Renewal Project — The Atlantic + Allstate. 2) Been There, Made That — Vox Creative + Visit Seattle. 3) Defy Hunger Together — The Wall Street Journal + Mini. 4) Hard Won — Thrillist + Smith & Forge Hard Cider. 5) The Water Diviner — Complex + Under Armour. 6) How to Solve a Murder — The Guardian + Amazon. 7) Journey of the Hop — The Weather Channel + Goose Island. 8) Back To The Block — Billboard + 1800 Tequila. 9) Escape From Catmageddon — Gawker + Truth. 10) Roots: A Cultural Force That Changed the Nation — The New York Times + History.
- Per AdAge, the **most viral brands posting to Facebook** in 2016 had an emotional quality and a sense of urgency. The list includes Shell, Yahoo, NBC, Kohl's and The New York Times. Measurement included paid and organic, generating most engagement on Facebook (defined as likes, shares and comments), Twitter (retweets and likes), Instagram (likes and comments), Tumblr (original notes) and YouTube (official views, comments and thumbs-ups).
- The New York Times revealed it has passed 100 million views of its **live streaming content** after launching on Facebook Live in April of this year.
- Noteworthy quotes:
 - » "You have to be ready to go if something happens competitively or there's a cultural moment, you have to be ready to unleash and put messaging out there that's relevant. ... The big thing today is to be more flexible in the approach." Deborah Wahl, chief marketing officer, **McDonald's USA**

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.

- **Sprint** hired independent Droga5 as its AOR for creative, brand strategy, positioning and overall brand experience without a review, replacing incumbent Deutsch, which the brand had been working with for the past two years. Sprint will continue working with Alma on Hispanic advertising. The agency will be expected to partner with the new internal agency named YellowFan Studios, which handles production. Droga5 resigned project work with T-Mobile.
- **H&R Block** hired independent Chemistry Communications as its new digital agency of record following years of collaboration. The agency will handle all consumer-facing digital marketing for H&R Block and its corporate website. The move follows the brand selecting VML as its social media AOR last year. Chemistry will work with VML and Fallon, H&R Block's creative agencies of record.
- Brewing giant **MillerCoors** selected Chicago-based Arc, a subsidiary of Publicis Communications agency Leo Burnett, as lead agency for all of its U.S. retail business, replacing incumbent Omnicom's Integer and consolidating efforts in this area. Arc had previously handled a small portion of the client's shopper marketing account. Agencies Walton Isaacson and Ten35 (formerly Commonground) are being shifted to project work.
- **Unilever's Lux** (Caress in the U.S.) selected JWT as its digital and content agency of record globally. The move expands on the 91-year relationship between the two companies.
- **Welch** named Jack Morton's Genuine AOR for digital creative and media after working with the brand on a project basis a few months ago. Scope also includes innovation, mobile and social. Genuine was acquired by Interpublic Group brand experience agency Jack Morton Worldwide in 2014. Digital and social make up 20% of the company's overall media spend.
- **Wyndham Hotel Group** hired Terri & Sandy as the agency of record for its Microtel Inn & Suites without a review, the first AOR for the brand. The agency will be responsible for integrated marketing.
- **Boston Market** hired The Richards Group as agency of record to handle creative, brand and creative strategy, and media planning after a competitive review, replacing incumbent The Zimmerman Agency, its AOR for the past six years. Media buying remains with Midas. A few months ago, Chick-fil-A parted ways with The Richards Group after 22 years.

- Food marketer **General Mills** named MDC Partners' 72andSunny and Redscout as its primary U.S. creative agency partners, replacing incumbent agencies McCann and Saatchi & Saatchi. A second phase of the creative review for its U.S. retail business has started to decide on a fixed roster of project-based agencies.
- **Warner Bros.** hired Dentsu's Merkle to handle its \$250 million digital media account.
- Auto maker **Toyota Motor** is moving to a single, integrated agency partner for all marketing, digital and media activities across Europe, moving from Publicis Groupe to WPP-backed The&Partnership. The new agency will create a network of dedicated hubs called &Toyota, which will include creative network CHI&Partners (the existing agency for the company's luxury car brand Lexus) and a data analytics unit, integrating data-driven creative with smart, responsive media planning. It replaces incumbent agencies Saatchi & Saatchi and Zenith. Media will be handled by m/Six, a U.K. media agency also backed by WPP.
- **Samsung North America's TV and home appliances business** hired Omnicom Adam & Eve/DDB (Advertising Age's International Agency of the Year in 2015) following a review, which included Cheil and Wieden+Kennedy.
- Financial services company **TD Banks** hired Havas Media as its new media AOR, replacing incumbent Interpublic Group's Tierney and Initiative following a review. Havas Media will handle all media across print, video, digital, mobile and social marketing, as well as analytics. Under its Village model, Havas works to integrate all of its marketing services in one place.
- **U.S. Bank** hired independent Crossmedia as its new media agency of record following a review, replacing incumbent Empower MediaMarketing, its agency for 20 years. The agency will handle media buying and planning, and use real-time analytics. Last year, the advertiser tapped Carmichael Lynch as its new creative agency of record to handle creative, digital, social media and production.
- Following a lengthy review, automaker **Fiat Chrysler Automobiles** selected Omnicom's Goodby Silverstein & Partners as its new creative AOR for the Chrysler brand, replacing incumbent independent Wieden+Kennedy, after a six-year run that included some of the most notable work in the automotive category. This move follows another recent appointment: GSD&M as lead agency for Dodge after a review, also replacing W+K as the prior AOR. The advertiser is also using Argonaut and Mind Over Eye for some of its Dodge work.
- Liquor marketer **Jim Beam** hired Leo Burnett to handle its global creative account after a competitive review. Jim Beam had been working with StoryWorks, a consortium of agencies from three countries: Mekanism from the U.S., The Works from Australia and Jung von Matt of Germany.
- Beauty giant **Coty** hired MDC agency Anomaly as its global creative agency partner for the Sally Hansen brand, following a competitive review and replacing incumbent Laird & Partners. The agency will handle communications planning and media strategy, TV, print, social and owned channels, and in-store. Publicis Media will continue to handle media planning and buying.
- **Coca-Cola's fairlife** brand selected MDC Partners' shop Doner as its creative and strategic agency of record following a review. The agency has been working with Coca-Cola for some time.
- Restaurant chain **Applebee's** launched its second creative agency review in only 13 months after moving from MDC Partners' CP+B to Barkley, which has worked with the brand since 2012 on in-store experience type of work. Barkley is likely to keep that work after the brand selects its new creative AOR.
- **Hulu** consolidated its media planning and buying under IPG's Universal McCann following a review in an effort to unify its advertising strategy and planning across all channels. UM will replace incumbent Razorfish (which handled digital) and Zenith (traditional media planning and buying).
- **Anheuser-Busch InBev's Shock Top** beer brand has selected Deutsch New York as its agency of record following a review. The move is believed to deepen A-B InBev's ties with Interpublic. The holding company's FCB agency in Chicago handles Michelob Ultra.
- Retailer **7-Eleven** kicked off a review to handle its creative business. JWT has worked with the brand on multiple assignments.
- Post-It parent **3M** kicked off a review to find a new creative agency for at least seven of its largest consumer brands, such as Post-It and Scotch, replacing incumbent Grey, the longtime creative agency for 3M's consumer brands.
- **General Mills** hired three creative agencies as preferred agencies for U.S. projects, after selecting 72andSunny and Redscout as its primary U.S. creative agencies, working on the company's larger brands. The agencies include Joan Creative, Erich & Kallman and The Community, which will work on projects across its portfolio of brands.
- **Pfizer** hired independent The Burns Group to handle its Centrum vitamin line following a review that also led to Grey being selected to promote its anti-heartburn drug Nexium. The Burns Group has worked on related brands.
- Wearable tech company **Fitbit** awarded its media buying account to IPG's UM after a review. UM will be Fitbit's first media AOR, but the brand previously hired Argonaut to create its debut global ad campaign a few years back.

Agency Roster Summary

Client	Incumbent	Scope	New Agency	Review
3M	Grey	Creative		Y
7-Eleven	JWT	Creative		Y
Anheuser-Busch InBev		Creative	Deutsch	Y
Applebee	Barkley	Creative		Y
Boston Market	Zimmerman Advertising	Integrated	The Richards Group	Y
Coca-Cola Co.		Creative	Doner	Y
Coty	Laird & Partners	Creative	Anomaly	Y
Fiat Chrysler Automobile	Wieden + Kennedy	Chrysler	Goodbye Silverstein & Partners	Y
Fitbit	None	Media	UM	Y
General Mills	McCann Erickson & Saatchi	Creative	72andSunny & Redscout	Y
General Mills		Projects	Joan Creative, Erich & Kallman and The Community	N
H&R Block		Digital	Chemistry Communications	N
Hulu	Razorfish & Zenith	Media	UM	Y
Jim Beam	Various	Creative	Leo Burnett	Y
MillerCoors	Integer	Creative	Arc	
Pfizer		Creative	The Burns Group	Y
Samsung		Creative	Adam & Eve/DDB	
Sprint	Deutsch	Creative	Droga5	N
TD Bank	Tierney & Initiative	Media	Havas Media	Y
Toyota Motor	Saatchi & Zenith	Integrated	The&Partnership	
Unilever Lux	JWT	Digital	JWT	
US Bank	Empower MediaMarketing	Media	CrossMedia	Y
Warner Bros.		Media	Merkle	
Welch		Digital	Geniune	
Wyndham Hotel Group		Integrated	Terri & Sandy	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.



No Longer Fly Blind With Your Agencies.

Discipline of agency management increasingly more data-driven to significantly improve efficiencies, effectiveness and ultimately relationship value.



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.