

Industry Update

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

Volume 39

Executive Summary—Monthly Recap

What a summer it has been... Facebook was fined \$5 billion as part of its privacy settlement approved by the FTC for the mishandling of Facebook user data by Cambridge Analytica, and it seems as if nothing can undermine the social media giant.

Top brands started ditching CMO positions, including McDonald's as the latest brand to not replace its global CMO role as Silvia Lagnado exits. Same as Johnson & Johnson with the departure of its global marketing officer, Alison Lewis. How will those companies fill the void? Who will be accountable for the agency partnerships these brands rely on to drive growth?

Meanwhile, the face of advertising is constantly evolving and in search of more purposeful and effective advertising. Innovative brands like P&G are changing the game by advocating for a new type of advertising, blending the ad world with new creative and content originating from filmmaking, music, comedy, and journalism, which translates into entirely new experiences.

Expect more gems like these inside Volume 39 of our industry update.



Bruno Galpois
Co-Founder & Principal
Agency Mania Solutions

Newsworthy reports and recent developments

At AMS, we approach the agency management discipline as four distinct but complementary practice areas—**Talent, Work, Financials,** and **Performance and Value**—which is how we've organized industry developments to follow.

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TALENT: securing the right talent and resources

The topic of talent is top of mind, especially for in-house agencies struggling to keep or retain creative talent and for the many agencies slowly losing their chief creative officers to brand advertisers also eager to build that muscle and direct the narrative of their brand. In the ANA's recent report, "The Continued Rise of the In-house Agency," brands acknowledged that talent recruitment and retention is one of the biggest challenges and one of the largest improvement opportunities.



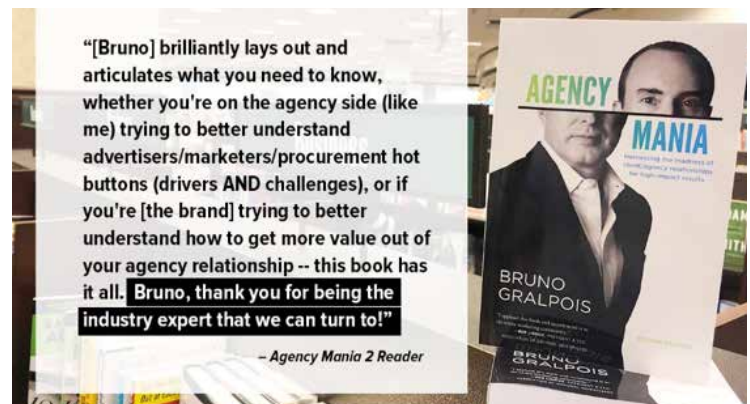
Training clients/
agencies can
be difficult.
We make it simple.

- **Publicis Groupe's** chief creative officer Nick Law is going to the client side to become Apple's vice president of marcom integration, signaling the importance of creative talent focused on design, simplicity, and digital.
- **Mediaocean** and sell-side software-as-a-service platform Operative came together to automate requests for proposals (RFPs) and processing insertion orders in TV. NBC Universal (NBCU) and several agencies signed on as launch partners.
- Per the Association of National Advertisers (ANA), 78% of its members have an in-house agency now, 90%+ work on digital creative projects. One-third handle media planning and buying.
- Per a 2019 **Dentsu Aegis Network CMO Survey**, over half of CMOs are planning to take some digital advertising capabilities in-house and 40% will spend more with digital agencies going forward. Only 6% expect to do less. Only 43% agree that agencies do a good job of providing fully integrated solutions. 50% will increase the amount they invest directly with ad-tech partners.
- Marriott set up a hybrid in-house agency called **Marriott One Media (M1M)** last year as part of Publicis' "Power of One" model. M1M is centered around Publicis' agencies SapientRazorfish and Spark Foundry.
- **Pernod Ricard** took a slower approach than its peers when creating its own in-house team in 2014, gradually moving more of its search, social, and programmatic advertising in-house.
- Per Forbes's **World's Most Influential CMOs** list of 2019, of the top 50, only 22 are new to the list. 31 of the top 50 are women and 17 of the top 50 are with tech companies.
- A **French Women's Rights** and nonprofit group, called "Les Lionnes" held a Cannes of their own to rally against industry sexism, rewarding campaigns created by agencies that treat women fairly.

- **Facebook** became a sponsor of Free the Work, a program to increase the number of women, often underrepresented, creators in film making. The brand's CMO, Antonio Lucio, was the initial sponsor of Free the Bid, a program advocating for women directors.
- **Havas** created an offering called Home, helping clients create in-house agencies while becoming their strategic advisors and offering resources.
- **MDC Partners** reorganized its media operation to create a new network built around data, technology, media, and content by aligning MDC Media Partners' media shop Assembly with data and CRM agency Gale.
- **Havas** acquired a majority stake in LA creative gaming and streaming entertainment shop Battery. The agency, whose roster includes clients like Activision Blizzard and Netflix, was repeatedly named to Ad Age's Small Agency of the Year list. The agency will be folded into Havas' Annex network.
- **Publicis Groupe** reorganized Publicis Communications US agencies (namely Saatchi & Saatchi, Leo Burnett, BBH, and Publicis) into three geographic zones (east, west, and center) with a CEO at the top for each. This multiphase reorg is designed to bring data, creativity, and technology together for its clients, and simplify how clients interact with the group.
- Award-winning designer Jessica Walsh started a new agency **&Walsh** offering brand strategy, design, art direction and production services. Existing clients include Snapchat, Adobe, Apple, Beats by Dre, and The Gap, among others.
- Independent **Garrand Moehlenkamp** introduced a "Nourishing Approach," blending rich shopper data and results of a 2018 consumer segmentation study aimed at food & beverage brands.
- Data provider **Giant Partners** acquired Worxstudio to combine its data business with digital agency capabilities.
- A new service, dubbed **Dawn**, launched to serve as a portfolio network in which independent agencies receive data science, measurement, and media expertise provided by NY-based independent media shop Crossmedia and its dedicated intelligence group, Redbox.
- **Havas Group** acquired a majority stake in Los Angeles creative agency Battery, becoming part of agency network Annex and renamed Battery Annex. Battery uses gaming and streaming entertainment storytelling services to create marketing programs and includes clients like Activision Blizzard, 2K Games, Netflix, Warner Bros, CBS, and Disney.
- **WPP** took a majority stake in Italian technology-driven creative agency AQuest, which offers UX and UI design, production, consumer experience, and activation services. Clients include Gucci, Bulgari, and Mercedes.
- **Interpublic Group** merged its two Hollywood PR powerhouses Rogers & Cowan and PMK•BNC and became part of Octagon Sports & Entertainment Network (part of IPG's Constituency Management Group).

Noteworthy quotes:

- o "We white-label any external help. So we make the decision more collaborative, but they may not know it's being sent out externally." —Wayne Barringer, director of creative services, **The Boeing Co.**
- o "There's no point in bringing in diverse people if then they don't feel included or they can't be themselves." —Diego Scotti, CMO, **Verizon**
- o "Each one of these apps [Facebook, Instagram, WhatsApp, Messenger] is going to have to tell their stories to its user base and that is why we have decided to have a different partner for each one." —Antonio Lucio, chief marketing officer, **Facebook**
- o "It's time for media agencies to 'suit up' and act more like their creative counterparts." —Hallie Johnston, chief client officer, US, **Initiative**
- o "Marketers that enjoy some advantages from in-housing may discover that a strategy that omits agency partnerships entirely could expose them to risk in other key areas." —Marla Kaplowitz, president and CEO, **4A's**
- o "It is time for the disruptors, the visionaries, the stubborn, crazy personalities to come back and reshape the industry in their own image." —Avi Dan, CEO, **Avidan Strategies, LLC**
- o "The struggle for the other holding companies is they're too big." —Yannick Bolloré, CEO, **Havas**
- o "All roads lead to L.A. It's the biggest creative department in the world." — Paul Marobella, chairman and CEO, **Havas Creative North America**
- o "Suddenly, my new best friend is IT. If you'd have asked me five years ago who I needed at the table for a media and creative pitch, you wouldn't have said your IT department." —Margaret Jobling, group chief marketing officer, **Centrica**
- o "We don't call ourselves one [agency]. It narrows people's minds where you fit and sit and point you down to the CMOs office." —Matt Candy, general manager and global leader, **IBM iX**
- o "They [big traditional agencies] can't shift their model; they can't get out of their [own] way." —Martin Sorrell, executive chairman, **S4 Capital**
- o "Brands and agencies draw energy from strong mutual partnerships. And they succeed together." —Marla Kaplowitz, president and CEO, **4A's**



WORK: producing great work and outcomes

We had the opportunity to witness brilliant work during the Cannes Lions as brands and agencies came to the Riviera to showcase their best campaign work across a wide field of marketing venues. The effective convergence of innovative technology and data, engaging content, and emotionally rich creative has never been timelier as consumers demand more. Advertising is being reinvented as we speak.



- Strong of 1 billion monthly active users, Facebook opened its **Instagram Explore** section to advertisers for the first time as users spend increasingly more time in that section (half of its daily visitors view the Explore section) than in their own feed. The ads appear only when a viewer clicks deeper into Explore, after choosing a video and then scrolling through the newly generated feed of videos.
- **Condé Nast International and Conde Nast in the US** Instagram accounts reached a total of 87 million Instagram followers earlier this year, with likes and comments on the rise by 62% YOY (6.4 million likes and comments monthly).
- Pizza chain **Papa John's** used Snapchat's marker tracking technology to create an AR experience activated when Snapchat users scan the Snapcode on its special new collectible Spider-Man Far from Home XL pizza box, transforming the pizza box into a European landscape.
- **Kate Spade** partnered with Refinery29 on a branded content series of 60-second Instagram-first videos and short films called "Pilot Season" that are being pushed out through Refinery29's Instagram platform (2.3 million followers and 2+ million YouTube subscribers) instead of Kate Spade's (2.6 million followers on Instagram but only 82,000 subscribers on YouTube).
- **Instagram** star Arie was unable to sell 36 t-shirts to 2.6 million followers, the minimum number of t-shirts required for starting a collection, stressing the importance of quality over quantity of Instagram followers.
- **Infiniti** launched an interactive Instagram Q60 coupe experience, created by Critical Mass, leveraging the quiz stickers feature, giving users a short amount of time to choose what happens behind the wheel of an Infiniti Q60 around a racetrack.
- Per MadHive/AdLedger report, **the average number of vendors** being used by agencies, brands, and publishers is 28. 70% believe they'll have even more within three years.
- **Cannes Lion entries** from consultancies are on the rise: Accenture agencies across categories went from around 75 in 2017 to 150 in 2018 and 500 in 2019. Deloitte's increased fourfold YOY to 202.
- **Conflict of interest, anyone?** Agencies are believed to be declining participation in media audits, media buys, or agency reviews led by consultancies like Accenture or its interactive agency division, citing conflicts of interest.

- Online retail giant **Amazon** offered its customers a \$10 coupon as part of Prime Day in exchange for tracking them all over the web, using Amazon Assistant, a browser extension that allows users to comparison shop and track data.
- Per Chris Laas, head of digital marketing at Etch, **responsibilities** across outsourced and in-house teams should be: outsourced (learning & development, provocation and perspective, software, and third-party platforms), in-house (data, relationship with suppliers, and budget) and shared ownership (recruitment, strategy, planning, and execution).

Noteworthy quotes:

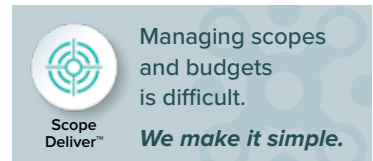
- o "We're here to reinvent advertising as we know it. Rather than constant reminders interrupting you, these micro-steps become habits that replace advertising."
—Marc Pritchard, chief brand officer, **P&G**
- o "How do we optimize and work together better? By not worrying about profit on the external side, and not worrying about the big agency taking work on the internal side."
—Wayne Barringer, director of creative services, **The Boeing Co.**
- o "It seems that we've finally turned a corner from talking about the demise of advertising and have shifted to a more optimistic outlook that's centered around creative partnerships and collaboration."
—Leeann Leahy, CEO, **The VIA Agency**
- o "We need to be more confident in what we do – and confidence is not the same as complacency."
—Mark Read, CEO, **WPP**
- o "We should not own first-party data for our clients. We manage it for them."
—Yannick Bolloré, CEO, **Havas**
- o "We don't need machines to kill our creativity; we're doing it to ourselves every day."
—Ben Lamm, co-founder and chairman, **Hypergiant**
- o "For martech, I don't think we build anything in-house, which is why we are working with all of the major vendors out there."
—Alan Tsui, vice president for digital and loyalty, Asia Pacific, **Marriott**

FINANCIALS: driving efficient use of resources

A continued rise in M&A deals illustrates the dynamic and competitive nature of our industry. Some predict a slowdown of advertising spend but digital advertising is well and growing as evidenced by key players like Alphabet, Facebook, and relatively new players like Amazon Advertising reaching astronomic numbers.

Ecommerce giant Amazon's share of digital advertising is forecasted to rise to 8%, from 3% in 2018.

Need I say more?



- **Publicis Groupe** completed its acquisition of Epsilon for \$3.95bn. Publicis Communications, Publicis Media, Publicis Sapien and Publicis Health will leverage these new capabilities and insights.
- Venture capital firm **Bain** entered into exclusive negotiations with WPP to acquire a majority stake in the holding company's research arm Kantar. WPP intends to streamline its offering and dispose of non-core assets. WPP recently sold its post-production services company, The Farm Group, to Los Angeles-based Picture Shop.
- Per Juniper Research, **global digital advertising spending** will reach \$520 billion by 2023 – up from \$294 billion in 2019 with 15% average annual growth over the next five years. Artificial intelligence-based programmatic buying capability and machine learning for targeting is expected to drive that growth. 75% of global online and mobile ads are expected to be delivered via AI-based programmatic advertising by 2023.
- **WPP** sold 60% of its stake in Kantar to Bain Capital, a deal valued at \$4bn, in a push to cut debt and refocus its efforts on core competencies while simplifying its offering.
- Per TrafficGuard, North American **ad fraud** is predicted to double to \$100m a day by 2023. Ad fraud in North America accounts for an estimated \$18.7bn in 2019, the equivalent of \$61 per average internet user wasted this year alone.
- **Alphabet's** revenue rose 19% YoY to \$38.9 billion in Q2, mostly driven by Google ad revenue and YouTube. Ad revenue reached \$32.6 billion in Q2.
- **SAG-AFTRA** filed an unfair labor practice charge against BBH as the agency attempted to move away from its SAG-AFTRA contract, claiming that rates and obligations are not realistic in today's marketplace. Unlike BBH, agencies like R/GA, Droga5, 360i, 72andSunny, and Anomaly have never been signatories of the union.
- **Amazon's advertising business** grew by 37% to \$3bn in Q2. The business is on course to exceed income from its cloud computing division by 2021.
- Ride-sharing service **Uber** filed a lawsuit alleging more than 100 companies committed "tens of millions of dollars" in mobile advertising fraud, including ad networks and publishers. The fraud includes "deceptive naming", "missing device IDs", "SDK outliers," and "non-mobile-optimized sites," among others, that contributed to inflated click estimates vs. actual app users.
- Per influencer marketing measurement company Instascreener, **influencer marketing spend** in the US and Canada went up 83% YOY (estimated at \$442M in Q2 alone) despite industry concerns ranging from ineffective measurement, fake followers, and influencer fraud. Fashion Nova was the top spender.
- Per R3, there were **235 M&A** deals with total value of \$13.6 billion in the first half of 2019, up 43% from the same period last year. Accenture and Publicis were ranked top buyers – Accenture was #1 with \$651 million worth of deals (including creative agency Droga5).
- **Omnicom Group** revenue fell 3.6% in Q2 to \$3.7 billion, but net income was up 1.8% to nearly \$371 million. Organic revenue growth was up 2.8%. The company expects organic growth of 2% to 3% by year end. Organic growth increased 8.4% for healthcare, followed by 4.4% for advertising and 1.9% for CRM consumer experience.
- **Interpublic Group** reported a 9.1% net revenue gain to \$2.31 billion in Q2, with organic growth of 3%. Organic growth in the US was 0.6%, resulting from client losses (Fiat Chrysler media, the US Army full-service account, and Volkswagen creative).
- **Publicis Groupe** reported net revenue of 4.352 billion euros (\$4.89 billion) for the first half of the year – a 1.7% increase from the same period last year. Organic revenue declined 0.8%. Net revenue in Q2 was up 1.6%.

Per COMvergence's MarCom Agency Acquisition Report, the here is the number of deals by group closed in H1 2019:



And the largest acquisitions in H1 2019:

TARGET (acquired firm)	Country (HQ)	Total headcount as of date of acquisition	Yearly revenues as of date of acquisition	Year founded	Segment	NEW OWNER
Epsilon	USA	9,000	\$2.200M	1969	DIGITAL	Publicis Groupe
MDC Partners	USA	6,000	\$1.480M	1980	ALL	The Stagwell Group
Inside Ideas Group	UK	1,500	\$150M	2017	DIGITAL	You & Mr Jones
Droga5	USA	500	\$95M	2006	CREATIVE	Accenture Digital
MultiView	USA	400	\$68M	2000	DIGITAL	The Stagwell Group
Filter	USA	287	\$29M	1991	DIGITAL	Dentsu
Comunica+A	Spain	260	\$37M	1997	CREATIVE	Dentsu
Shackleton	Spain	175	\$16M	2004	DIGITAL	Accenture Digital
Hjaltelin Stahl	Denmark	150	\$20M	2003	CREATIVE	Accenture Digital
Brilliant & Million Co (B&M)	Thailand	130	\$5M	2007	DIGITAL	Publicis Groupe

Noteworthy quotes:

- o “Don’t shy away from the finance and procurement people. Try and embrace them and connect with them so you’re not seen as a gatekeeper, but as a partner for their aspirations.” —Wayne Barringer, director of creative services, **The Boeing Co.**
- o “Marketers need to view agency creativity – in all forms – as an investment, not a cost.”
—Marla Kaplowitz, president and CEO, **4A’s**
- o “There will definitely be more performance-based deals going forward. We’ve also been asked to be paid for output, so not just the time.” —Laurent Ezekiel, chief marketing and growth officer, **WPP**
- o “Even budget-conscious marketers are learning that in-housing may no longer be a cost-efficient move.”
—Marla Kaplowitz, president and CEO, **4A’s**

- The **Cannes Lions International Festival of Creativity** 2019 featured 29 categories and 932 awards. The US dominated with 70 Gold Lions, 14 Grand Prix awards and a total of 313 awards (33%), followed by the UK (9.8%), Brazil (9.1%) and France (6.4%).
- The Cannes Lions International Festival of Creativity awarded **Agency of the Year** to Wieden+Kennedy Portland, followed by McCann New York and Droga5 New York, respectively. Omnicom (DDB, BBDO and TBWA networks, etc.) won **Holding Company of the Year** (the second year in a row after ending WPP’s seven-year reign last year), followed by Interpublic Group of Companies and WPP.
- At the Cannes Lions International Festival of Creativity, **FCB**, creator of the Burger King “Whopper Detour” won the top prize and also won the most Gold Lions, bringing in 22 to add to its three Grand Prix wins, followed by DDB (15 Gold Lions), TBWA (12), McCann (12), Wieden+Kennedy (11), and AMV/BBDO and VMLY&R (7 each). TBWA\New York delivered its best performance in 20 years with 18 Lions.
- At the Cannes Lions International Festival of Creativity, WPP’s Mindshare was named **Media Network of the Year**, followed by Starcom and MediaCom. Mindshare won a few Lions, including “gold” for its work on the “Hacking Prime Day” campaign for General Mills brand Cheerios.
- Celebrating the most ambitious and innovative campaigns, the **Titanium Grand Prix** at Cannes Lions International Festival of Creativity was awarded to FCB New York’s “The Whopper Detour” for Burger King. Other winners: McCann New York’s “Changing the Game” for Microsoft, Wieden+Kennedy Portland’s “Dream Crazy” for Nike, and DDB Germany’s “The Uncensored Playlist” for Reporters Without Borders Germany.
- Advertisers can now buy **Amazon Fire** TV inventory through third-party vendors and with two of the industry’s largest DSPs (Dataxu and The Trade Desk). Fire TV has 34 million monthly active users.

PERFORMANCE: driving stronger performance and value from the partnership

The Cannes Lions International Festival of Creativity is now behind us, but the numbers were impressive: 932 awards across 29 categories.

There are few events in our industry where the spotlight is on the remarkable performance of the work created by clients and their agencies. Automation has been key, but creativity remains an important part of what constitutes success.



See how stronger relationships contribute to better marketing. Contact us at www.agencymania.com.
If others in your organization are interested in receiving this Industry Update, please let them know that they can sign up on our site at www.agencymania.com/subscribe.html.

Noteworthy quotes:

- o “This is no longer something that is ‘around the corner’ or ‘maybe next year.’ The time is now.” —Pete Kim, CEO, **MightyHive**
- o “I think we do a tremendous amount of work and our people work extremely hard for our clients, so we need to be robust in defending what we do and the value we bring.” —Mark Read, CEO, **WPP**
- o “Ultimately, we’re an industry powered by creativity and people... If I look at the thing that swung it, it’s creativity and people.” —Margaret Jobling, group chief marketing officer, **Centrica**
- o “As disruptive as AI and automation have been to the ad industry, I fully believe that it will ultimately help us regain – and even catalyze – creative energy.” —Ben Lamm, co-founder and chairman, **Hypergiant**
- o “Brands and agencies draw energy from strong mutual partnerships. And they succeed together.” —Marla Kaplowitz, president and CEO, **4A’s**
- o “It’s about being able to take the data, analyze it, then coming up with the right content and distributing it most effectively.” —Martin Sorrell, executive chairman, **S4 Capital**
- o “I believe that when working in-house, more work that is created internally gets produced at a rate that is much higher than at an external agency.” —Warren Chase, VP and COO, **Verizon’s in-house agency 140**



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.

Managing an agency roster is difficult.
We make it simple.

- Pharma firm **Allergan** hired GroupM’s Mindshare to handle its US media buying and planning account after a review, replacing incumbent since 2002, GroupM’s Mediacom. In an unusual move, Allergan halted the transition of its business to Publics Groupe’s Spark Foundry after meeting the agency post-selection.

- PepsiCo’s **Mountain Dew** selected TBWA\Chiat\Day New York as its creative AOR following an Omnicom-only review, replacing longtime incumbent BBDO New York, which had worked with the brand for 46 years. PepsiCo works with a range of agencies around the world and occasionally hires agencies for “jump ball” project assignments.
- Maintenance and repair provider **Grainger** selected gyro as its creative agency of record in the US following a review, replacing incumbent since 2013, Ogilvy Chicago. Gyro was named Grainger’s media agency of record in 2017.
- **Anheuser-Busch InBev** hired Interpublic’s Deutsch to handle a key global marketing assignment for Michelob Ultra, following a review. The agency will collaborate with other roster agencies to help the brand expand internationally. FCB Chicago remains Michelob Ultra’s US agency of record.

- **Beiersdorf** and its biggest global brand Nivea ended its century-old relationship with FCB (known as Lord & Thomas before becoming FCB) as the brand reviews Nivea's agency model. The move is amid three waves of backlash over ads critics saw as racially insensitive.
- **University of Phoenix** selected TBWA\Chiat\Day Los Angeles and RAPP to handle its creative account, replacing incumbent agency since 2015 180LA.
- UK-based energy giant **Centrica** selected WPP to handle its global consolidated marketing communications account (creative, media, CRM, PR, data, analytics, etc.) for consumer marketing, following a review. The WPP team, a bespoke team called "Team Nucleus," includes Wunderman (CRM) and MediaCom (media). The Partnership (a joint venture in which WPP has a 49% stake) will handle creative.
- Sports drink **BodyArmor** selected Laundry Service as its creative AOR, following a review, replacing incumbent The Brooklyn Brothers. The agency will handle strategic and creative executions for the brand across TV, digital, social, out-of-home, and print.
- Online travel agent **Travelocity** selected Havas's Arena Media Agency and independent shop Proof Advertising as its media and creative AORs respectively, following two separate reviews, replacing incumbent Interpublic Group of Cos.' Campbell Ewald (its creative AOR for the last four years) and incumbent Assembly (its media AOR for the last four years as well). Havas is also the AOR for Travelocity sister company Orbitz.
- **Bed Bath & Beyond** kicked off a review of its media and creative account as the brand prepares a rebranding effort for the holidays. EVB is one of the incumbent agencies defending.
- Restaurant chain giant **McDonald's** selected independent agency Wieden+Kennedy NY for an upcoming project to focus on the brand's creative positioning in the US, ending the chain's exclusive creative advertising relationship with Omnicom and We Are Unlimited, the agency that Omnicom's DDB created in 2016 to handle US creative.
- Retailer **eBay** selected WPP MediaCom as its new worldwide media AOR following a global reorganization, resulting in a consolidating of the brand's media business and replacing incumbent since 2016, Publicis Media's Blue 449. Since 2017, 72andSunny has been the global creative AOR.
- Restaurant chain **TGI Fridays** selected McCann NY to handle its US creative advertising account. McCann will collaborate with sibling shop UM which just recently started handling media in the US.
- Burger chain **Carl's Jr.** (through its parent company CKE which also owns sister brand Hardee's) placed its creative advertising business in review less than a year after selecting new agency partner Havas. Arnold remains the agency of record for Hardee's. The selected agency will partner with IPG's Initiative, its media AOR.
- Teen video app **TikTok** selected four agencies to handle its US advertising efforts: RPA and Channel (creative), IPG Mediabrands' Initiative (media), and Montreal-based agency Sid Lee (community management), following a review.
- Fantasy sports provider **FanDuel** hired Publicis Groupe's Bartle Bogle Hegarty (BBH) as its lead agency to handle brand strategy, following a review. BBH will collaborate with the in-house marketing team of 85 people and handle media planning and design work. The brand will continue to work with other roster agencies on a project basis.
- **Mattel** retained Publicis Media's Spark Foundry as its media AOR in North America following a review, replacing incumbent Dentsu Aegis Network's Carat. UM landed the media account across Europe, the Middle East and Africa, and Asia-Pacific, also retaining Latin America.
- Grocery chain **Kroger** selected Omnicom DDB New York as its AOR for creative (its first one ever) following a review.



Agency Roster Summary

Client	Incumbent	Change/Scope	Focus Area	New Agency	Review?
Allergan	Mediacom	Media	U.S.	Mindshare	Y
Anheuser-Busch InBev	FCB Chicago	Marketing	Global	Interpublic's Deutsch	Y
Bed Bath & Beyond	EVB	Media, Creative	U.S.		Y
Beiersdorf	FCB	Creative	Global		Y
BodyArmor	Brooklyn Brothers	Creative	U.S.	Laundry Service	Y
Carl's Jr.	Havas	Creative	U.S.		Y
Centrica		Marketing	Global	Wunderman, MediaCom	Y
Centrica		Creative	Global	The&Partnership	Y
eBay	Blue 449	Media	Global	MediaCom	N
Fanduel		Strategy	Global	Bartle Bogle Hegarty (BBH)	Y
Grainger	Ogilvy Chicago	Creative	U.S.	gyro	Y
Kroger		Creative	Global	DDB New York	Y
Mattel	Carat	Media	U.S.	Spark Foundry	Y
Mattel	Carat	Media	Global	UM	N
McDonald's	Omnicom, We Are Unlimited	Creative	U.S.	Wieden + Kennedy NY	N
Mountain Dew	BBDO New York	Creative	U.S.	TBWA\Chiat\Day New York	Y
TGI Fridays		Creative	U.S.	McCann NY	N
TGI Fridays	The Richards Group	Media	U.S.	UM	N
TikTok		Creative	U.S.	RPA, Channel	Y
TikTok		Media	U.S.	Mediabrand's initiative	Y
TikTok		Community Management	U.S.	Sid Lee	Y
Travelocity	Assembly	Media	U.S.	Hava's Arena Media Agency	Y
Travelocity	Campbell Ewald	Creative	U.S.	Proof Advertising	Y
University of Phoenix	180LA	Creative	U.S.	TBWA\Chiat\Day Los Angeles, RAPP	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.