Industry Update



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

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EXECUTIVE SUMMARY: Monthly recap

Most analysts predict high volatility in the months to come, especially in digital advertising, and it is expected to spread across the entire advertising and marketing space.

Agencies and advertisers are all dealing with a great sense of uncertainty right now. Macroeconomic concerns have been an ongoing topic of conversation, with unknown consequences for how budgets will be impacted in 2023. If anything, the challenges underscore once again the ingenuity and resilience shown by all of us to withstand the COVID-19 pandemic, territorial conflicts and inflationary trends and still fuel economic growth and thrive.

Advertising is not recession-proof, but the industry benefited from a vibrant midterm election in the US and one of the world's largest sporting events, the FIFA World Cup, which kicked off on Nov. 20 in Qatar with big sponsors like Coca-Cola, Gatorade, Pepsi, Hyundai, Frito-Lay, Puma and Budweiser.

The Association of National Advertisers (ANA) recently told the Federal Trade Commission that "Advertising is the lifeblood of the American economy."



It's now clear that advertising is the lifeblood of the global economy as well.

Bruno Gralpois Co-Founder and Principal, Agency Mania Solutions

TALENT: Securing the right talent and resources



According to *The Wall Street Journal*, the continued "splintering of mass media, new demand for e-commerce and the rise of new platforms such as TikTok have helped ad agencies

reassert their importance to marketers." The newspaper is right. Agencies are transforming their business and offering to provide more direct data and e-commerce services as well as first-party data services in response to companies' digital transformation, the ever-changing media landscape and soaring demand for e-commerce. The battle is on. Holding company Omnicom hired its first global CMO, signaling that competition is fierce and agencies must differentiate themselves.

- At the 2022 ANA Masters of Marketing conference, hot topics ranged from multicultural marketing and diversity, equity and inclusion (DE&I); protecting against budget cuts and combating economic headwinds headon; taking creative risks; the rise of retail media (e.g., Walmart Connect); and purposeful marketing with a growing focus on sustainability.
- Michael Farmer released his new book, Madison
 Avenue Makeover: The Transformation of Huge
 and the Redefinition of the Ad Agency Business.
 The author was invited by Mat Baxter, the new CEO
 of Huge, to become a "fly on the wall" and observe
 the transformation of Huge. The global digital agency,
 owned by Interpublic, had had a history of slow growth,
 client churn and marginal profitability.
- Mary Ann Brennan participated in 20%—The Marketing Procurement Podcast with Blair Enns and Leah Power for a session called "The Transformed Procurement Professional," and discussed the transformed procurement professional and the journey from cost saver to value creator.
- Per Claire Randall, key insights of the Producers & Procurers iQ Marketing Procurement and Financial Management Summit were:
 - 1) Transparency is still a concern
 - 2) Technology is a huge enabler and will drive better visibility, benchmarking, agility and control
 - 3) Trust but verify
 - 4) Take control and drive efficiencies from the center
 - 5) Central control is the only way to limit the risk of rights violations
- Per Raus Global, key takeaways from ProcureCon Marketing 2022:
 - 1) Transparency remains key across supply chains
 - 2) Three questions to ask yourself and your marketing team: Do we know the cost of all our media? Do we have access to the best media deals without giving up transparency into cost? Do we know how our media partners make their money?
 - Clear strategic imperative and aligned KPIs are essential
 - 4) Manage your stakeholders
 - 5) Marketing procurement is now much more focused on identifying operational savings
 - 6) Be ready to rumble (probability, complexity and ROI)

- · Per Flock Associates, key takeaways were:
 - 1) Stakeholder relationships (and how to manage them)
 - 2) Value over price
 - 3) Enable DE&I
 - 4) Sustainability
 - 5) Communication is key
- Per 4A's, advice for agencies in uncertain economic times:
 - 1) Hope for the best, plan for the worst
 - 2) Manage by revenue, headcount and cash
 - Conduct an internal audit (processes and practices, rates, client contracts, vendor contracts, vendors)
 - 4) Remember that happy employees equal great work
 - 5) "Love the one you're with" by strengthening and expanding client relationships
- Per The Drum's Agency Wellbeing Census, average staff retention at UK agencies is 42%. Attrition has therefore exceeded more than 1 out of 2 staff there, further illustrating the systematic talent gap experienced by agencies post-pandemic. US figures are lower than that but trending higher than in prior years, a concerning trend for brands and agencies.
- Per Adweek, "It's Not Me, It's You": 6 red flags/signs a brand advertiser needs a new agency:
 - 1) Core expertise misalignment
 - 2) Your own business growth
 - 3) Lack of strategy
 - 4) Team turnover and staffing holes
 - 5) Inability to measure impact
 - 6) Trust is broken
- Per Setup, 38% of US advertisers are likely to end their current ad agency relationship within the next six months as a result of leadership changes and a perceived lack of strategy. 22% of brands say they have too many agency partners. 22% of advertisers are bringing marketing duties in-house or "actively" working to do so.
- Per Adweek, shops are carefully choosing which RFPs they'll respond to (choosing higher profile or profitable accounts) because of talent issues (hiring, retention/ attrition, wages), forcing brands to reduce the number of agencies to include in any given pitch.
- Per Forrester, Agency Predictions for 2023 include:
 - 1) Hybrid work officially changes agency culture
 - 2) Product-oriented leaders ascend to top jobs
 - 3) B2B marketing gets its time to shine
 - 4) Privacy concerns stymie in-house media expansion
- Per COR, 60% of agencies use three tech management tools or more for agency management and operations.
 Over 17% use five to 10 tech tools, and 4% use more than 10 to manage their operation.
- Holding company WPP built its first highly contemporary "campus" to house 7,000 employees across 26 of its agencies based in the creative hub of São Paulo to enhance cost efficiencies and collaboration among staff.



New agencies or capabilities, restructures and reorganizations:

- StartRocket is the first agency to represent brands in space, connecting brands with the worldwide space industry and linking national space agency partners, private space companies and the scientific community with creative, communications, PR, media and advertising. StartRocket operates in San Francisco, London, Milan, Tel Aviv and Dubai.
- Interpublic's digital shop R/GA restructured its agency as part of an initiative called "distributed creativity," moving its internal US teams from a city model to a country model (without offices as focal points for clients or management purposes) and from a "project-based mindset" to a "relationship-based mindset" with a nimbler approach.
- Publicis Groupe and supermarket and convenience store Carrefour joined forces to create retail media networks in continental Europe, Brazil and Argentina, driven by Publicis Groupe's retail media platform CitrusAd, powered by Epsilon and the data and the retail media expertise of Carrefour Links, the company's in-house retail media platform. Carrefour owns 51% of the joint venture and Publicis Groupe, 49%.
- Havas Media Group launched its new multicultural practice to help clients approach multicultural media experiences through an integrated lens and smart, strategic programs that are culturally relevant, with a focus on Hispanic, African American, Asian American and LGBTQIA+ consumers.
- Dentsu Group merged two of its businesses in Japan—Artificial Intelligence and analytics specialist Data Artist, which is being absorbed by Dentsu Digital, one of Japan's largest digital agencies, to bolster its digital transformation service. The move is part of broader restructuring that will see the Japan operation organized into four client-facing service areas: AX (Advertising Transformation), BX (Business Transformation), CX (Customer Experience Transformation) and DX (Digital Transformation).
- San Francisco-based agency Eleven, which is owned by Canadian holding company Plus Company, merged into **Mekanism** to gain greater scalability. It will operate under the brand Mekanism. Plus Company currently owns over 20 agencies, including We Are Social, Socialize, Hello, Kobe, Metta, Fuseproject, All Inclusive Marketing, Aperture1, Camp Jefferson, Citizen Relations and Cossette Media.
- Holding company Stagwell retired the Media Network name and rebranded it to Brand Performance Network, after adding legacy creative agency Crispin Porter Bogusky and removing the agency from its creativefocused Constellation network. The move signals the importance of combining creative and media for clients and the need for holistic marketing partners as opposed to media-exclusive offerings.

- A new B2B-focused agency called The Imaginarium
 has launched. The Boston-based agency will create
 content for LinkedIn and other digital media to "spark
 inspired connections," leveraging its proprietary tech
 and data platform, Enspyron, and a panel of over
 3 million B2B buyers and 1,400 attributes to create
 audience models.
- Horizon Media launched a new sports marketing and brand experience agency, Horizon Sports & Experience (HS&E), which merged with Horizon's existing Scout Sports and Entertainment division in an effort to bring a unique and complementary combination of sports, experiential and media capabilities and expertise under one group. Horizon Media's recently launched metaverse consultancy, Chapter & Verse, also will be merged into HS&E.

Responsible advertising (diversity and inclusion, environment, etc.):

- Per the ANA and its diversity benchmark, female and non-white ethnic group representation rose among members: 29.1% of ANA members identify as non-white, up from 27.2% last year. A record 14.6% of ANA member chief marketing officers identify as non-white, compared to 13.7% last year. Women make up 68.3% of the membership, compared to 67.1% last year, as well as 55.6% of senior management, up from 54.8% last year but a decline from a record 56.2% in 2020.
- The Cannes Lions International Festival of Creativity
 award entries for 2023 will have new requirements
 to address the impact work has on growth and the
 environment (e.g., information on CO2 emissions from
 the work's production process) as well as disclosures
 about the diversity of teams, going beyond efforts
 such as creating the Glass Lions and Sustainable
 Development Lions.
- Stagwell's Code and Theory released its Inclusive
 Writing Guide, called "Words Up," a resource designed
 for the creative and advertising industry with the goal to
 elevate intentions with language but also keep it real.
 Content includes Ability and Disability, Age, Nationality,
 Race and Racism, Gender, Sexuality, Appearance, and
 Socioeconomic Language.
- Target committed to spending 30% more on Blackowned and Latino-owned media during the holiday, similar to the retailer's 2021 holiday season investment. The brand is significantly increasing the number of Black-owned brands available in its stores.
- The Ad Council partnered with Historically Black Colleges and Universities and other partners to launch a new career accelerator program to foster greater diversity.
- The industry's Trustworthy Accountability Group launched a new certification program, called "Certified for Transparency," that aims to provide advertisers with detailed metrics about online campaigns. It also provides advertisers information about brand-safety issues on publishers' sites.



- Nestlé announced it will stop advertising its ice cream, confectionery and water-based beverages with addedsugar brands to children younger than 16 starting in July 2023, specifically on platforms where this age group constitutes more than a quarter of the audience. This move expands on the brand's policy to ban product marketing communication targeting children 6 years and younger.
- WPP's GroupM unveiled a new "Client Coalition" comprising 20 of its largest clients (and representing \$10 billion in combined global ad spending from clients like Audible, AXA, Bayer, Danone, Deutsche Telekom, Mars, Paramount, Sony, Tesco and more) and invited the clients of other agencies to join it to act as a collective force and help standardize the way the ad industry works with and leverages the media supply chain.
- Dentsu International committed to decarbonize the media supply chain by 46% by 2030 by integrating carbon emissions data (like the carbon emissions impact of media buys at an impression level) directly into its proprietary media-planning system (CSS Planner), which is used by all of Dentsu's media-planning and media-buying teams worldwide. The firm and its Carat division want clients to allocate explicit "carbon budgets" alongside the ad budgets it spends on media for them. Per Volta Media, 55% of American consumers identify themselves as "climate conscious," a 15% increase from 2021.
- Per ASA Council rulings by The Independent, key UK brand offenders of so-called "greenwashing," as a result of exaggerating brands' green credentials or making claims that could not be substantiated, are:

Ryanair
 Oatly
 Alpro
 Innocent Drinks
 Quorn
 Pepsi Lipto
 Hyundai
 Shell UK

Per Purpose Disruptors and Magic Numbers, CO₂
 emissions caused as a result of advertising-driven
 consumption in the UK have increased by 11% between
 2019 and 2022. Advertised emissions are defined as
 the uplift in greenhouse gas emissions that result from
 the increase in sales generated by advertising.

In-house agencies:

Per Lytho, 75% of in-house creative and brand teams have gone through some restructuring in the last 12 months or are currently being restructured—fueled by "better internal collaboration" (45%), ensuring a "sustainable workload" (39%) or "improving customer experience" (36%). 91% use project management or creative workflow software and track key data (type of projects, hours, utilization, etc.).

Noteworthy quotes:

- "The foundation of that trust is a true shared passion to make each other the most successful you can be."—Jon Wilkins, Global Managing Director, Accenture Song
- "The 'talent wars' for good quality marketing talent is real, and the agencies are definitely feeling that in a big way."—Joe Koufman, founder and CEO, Setup

- "Senior marketing leaders have come to the conclusion that their success lies in being a widely known hired gun, and that their career is going to be a series of two- to three-year stints."—Mark Stouse, Chairman/CEO, Proof
- "We're working with a client right now who's doing everything in-house and we are co-collaborators on almost everything they're doing, including co-negotiation of deals."—Bill Koenigsberg, CEO, Horizon Media
- "Our assertion is that when in-house and external agencies work together in close collaboration, the combination of talent, capacity, and capability they have can result in unique value for the businesses they serve."—Emily Foster, Director, In-House Agency Forum
- "Defining roles and responsibilities between creative partners is key to success, but first, you must rely on your internal partners to drive clarity. It takes good partnerships internally to drive good partnerships externally."—Andrea B. Ruskin, Partner and Co-Founder, Blum Consulting Partners
- "When brands use inclusive language, they invite communities in, grow their audiences, and create brand love with consumers they may have failed to recognize in the past."—Kirstyn Nimmo, Group Director, Inclusive Design and Marketing Strategy, Code and Theory
- "When people say that 'chemistry' is a key ingredient, it is chemistry with the leader that matters, and whether you're aligned with their values."—Avi Dan, Founder and CEO, Avidan Strategies
- "We are much more than just an advertising company, and while it remains important, our business is broader than that and it will continue to be broader than that."—Mark Read, CEO, WPP
- "Creativity can be the rocket fuel to maximize acceleration and growth."—Soyoung Kang, CMO, Eos Products
- "What has changed dramatically is both the skill sets that clients are looking for from their agencies as well as the criteria they use to select what agencies might be right for them."—Tom Browning, President, JLB + Partners
- "When every media agency in every brief that's going in has a carbon budget and a media budget, then we're having real impact at scale."—Fiona Lloyd, Global Brand President, Carat
- "I'm big on building 10-, 15-, 20-year relationships. Unfortunately, as you know, a CMO doesn't last that long."—Bill Koenigsberg, CEO, Horizon Media
- » Clients will come to us and say today, 'How do I succeed on Amazon? How do I build brands on social media? How do I protect my reputation on the web? How do I build stronger employee engagement? What's my mobile experience? How do I build direct-to-consumer [offerings]?' Those are all questions that they weren't asking, and we weren't answering, 10 years ago."—Mark Read, CEO, WPP



Company profiles:

 Mekanism is a San Francisco-based creative agency (with offices in Seattle, Chicago, NYC and LA) that specializes in the development and production of marketing campaigns, commercials and branded entertainment for multinational companies based on an approach called "storytelling for emerging media," combining "science and soul." The shop was acquired in 2022 by Canada's Plus Company, a private equitybacked marketing holding company based in Quebec.

Per the shop's mantra, "Not everyone loves ads, but everyone loves a great brand. So we build great brands using a unique blend of creativity and performance." Services include business strategy, brand strategy, creative (including in-house production), performance (analytics, testing and optimization), platforms and media.

The firm offers Ground Control, a data platform where it publishes KPIs, insights and performance data in real time for clients. Recent awards include 2022 Effie Awards. Clients include Sling, LendingTree, Alaska Airlines, OkCupid, Frida, Peloton and Eos.

 The Stable is an Omnichannel company based in Minneapolis (with offices in LA, Bentonville, Arkansas, and Seattle) and has 400 employees connecting online and offline commerce and connecting brands and consumers across all channels. The shop is now part of Accenture Song (since August 2022).

Founded in 2015 and recognized as one of *Inc. Magazine's* fastest-growing private companies in 2021, the agency offers a full-suite of services: retail; direct-to-consumer; digital marketing and media; brand and content studio; and data and analytics.

The firm also built a proprietary set of commerce tools (Hyphen, Bedrock and Blackbird) to increase off-site media performance, build a powerful e-commerce presence and get insights across all commerce channels. Clients include Netflix, Red Bull, General Mills, Spanx, Samsung, Johnson & Johnson, Hershey's and Black+Decker.



Check out our newly updated Resources section for new <u>articles</u>, like "How Can Advertisers Give Their Agencies More Effective, Actionable FEEDBACK?".

NEW ARTICLE

How Can Advertisers Give Their Agencies More Effective, Actionable FEEDBACK?



Strategic Partnerships Delivered.



Looking for more? Download our consolidated list of <u>Agencies Profiled</u> from our 2021 monthly Industry Updates (2022 version coming soon). We share the category they work in, and the services provided.

Need to manage your agency roster? You already have the right partnerships in place, but do you need to better manage your existing roster of agencies? There is a better way. Check out our new video explainer about **RosterDeliver**.



WORK AND PERFORMANCE: Driving better work, stronger performance, and value from the partnership



There is no shortage of controversy and challenges, between layoffs and budgets cuts, FIFA and Twitter. Brand advertisers are looking into contingency planning, prioritization of activity,

and a focus on actions that will drive performance and sales as many anticipate difficult economic times ahead. In the meantime, FIFA's World Cup is capturing viewers' attention despite controversies about its host country, which led some to boycott the event. Twitter is also top of mind as major brands reevaluate their commitment to the platform (#RIPTwitter) following Elon Musk's chaotic acquisition and controversial decisions—including reinstating a handful of suspended Twitter accounts, such as those of former US president Donald Trump and rapper Kanye West. Musk's moves have led to operational and policy concerns, deep layoffs, advertisers (e.g., GM, United Airlines, Mondelez International) pulling out and an uncertain future for the company.

- Kim Kardashian is reevaluating her relationship with Kering-owned French luxury fashion brand **Balenciaga** following backlash over a child ad and its controversial photo shoot, raising questions about who is ultimately responsible. Balenciaga is suing production company North Six and its agent, Nicholas Des Jardins, for \$25 million.
- Walmart launched Walmart Creator, a program aimed at enabling and incentivizing creators to develop shoppable content around the retailer's merchandise, as a new way to build social commerce. The offering includes data and a dashboard to help creators see how they're performing and improve results.
- Per John Piccone (Adform), key macro industry forces transforming the digital media environment are:
 - 1) Consumer empowerment
 - 2) Regulatory changes
 - 3) First-party data prioritization
- Paul Phillips (AAR Group) issued a research piece called "2023 Crystal Ball Gazing," leveraging insight from industry players Roth Ryan Hayes, Joanne Davis Consulting, Agency Mania Solutions, Navigare, Trinity P3, Scopen, Cherrypicker, Francis Drake, Pitchville, VT Scan, GG Marketing, Breezway, Independent Agency Selection and R3. Key insights: New business in 2023 is expected to be flat for agencies; CMOs are looking to simplify their agency arrangements (e.g., fewer agency partners); the future of in-housing is unclear as some clients have decommissioned (with agencies picking up duties); and CMOs' focus in 2023 is on ROI in light of challenging economic times.
- Per Buffer, Meta's Facebook has 2.9 billion monthly active users; YouTube, 2.2 billion; Instagram, 2 billion; and TikTok, 1 billion.
- Ogilvy launched a "digital human" and experience studio called Reality, which it describes as a digital experience "lab" dedicated to researching and creating new applications of technologies such as AR, VR and NFT.

- TikTok introduced a new ad unit that will charge advertisers only when an ad is watched, based on its Focused View ad format and its TikTok Ads Manager platform.
- "Do you have clear swim lanes?" Per Blum Consulting Partners, brands must:
 - Use their marketing partners to define asset production needs
 - Use their agency management and procurement partners to help manage timelines and drive clarity on expectations
 - Use their head of studio to track past scope as a barometer for upcoming scope
 - 4) Make sure they have clear definitions of asset types and deliverables to guide staffing requirements
- Per Dentsu, 10 trends are reshaping media in 2023:
 - Ad-supported video-on-demand services overtaking subscription services, which is being accelerated by streaming platforms like Netflix and Disney+ adding ad-supported tiers
 - The continuing mainstreaming of gaming platforms/services
 - 3) A shift toward attention-based metrics
 - 4) A shift toward "always-on" shopping patterns
 - 5) The rise of retail media platforms
 - 6) The rise of "super apps" comprising their own "ecosystems"
 - 7) The official demise of third-party cookies
 - 8) The ascendence of live event marketing by major brands
 - 9) The continuing dominance of social algorithms
 - 10) The continuing shift toward "brand responsibility"
- Per COMvergence, Interpublic media agency Initiative is the top new business winner based on estimated billings (deducting lost accounts and including retained business) for the first nine months of the year, with an estimated \$1.35 billion in billings. The agency successfully defended two big accounts: Liberty Mutual in the US (\$492 million) and Merck globally (\$295 million). Mindshare ranked second, and GroupM's Wavemaker was third.
- Per The Drum and YouGov Survey Direct, 43% of Americans still accept all cookies despite growing privacy concerns, but the numbers are dropping YOY. Only 33% are comfortable sharing personal information with a website for a better online experience, and 35% are comfortable sharing personal information with a website in exchange for a discount.

Awards:

- Cannes Lions introduced new award categories for 2023 with a focus on impact, effectiveness and growth: Entertainment Lions for Gaming (celebrating creative work that connects people to brands through gameplay). It also refreshed existing Lions: Creative B2B, Pharma and Mobile. It will also include metaverse across the Lions and embed sustainability while encouraging DE&I.
- Per the 2022 ANA Multicultural Excellence Awards,
 Procter & Gamble was the most awarded client-side marketer with six wins, while McCann, New York, with five awards, won the most among agencies.



- Per the 2022 London International Awards, winners were: Ogilvy (Network of the Year), Dole (Client of the Year), Alma (Agency of the Year), Serviceplan (Independent Network of the Year), L&C NYC (Independent Agency of the Year), IPG Health (Health and Pharma Network of the Year), HIP HOP Public Health (Health and Pharma Agency of the Year) and Area 23 (Health and Pharma Agency of the Year).
- R/GA was named the 2022 Webby Agency of the Year for its innovative work in applying design and media to thoughtfully create digital projects. The firm collected seven awards, six nominations and four honors.
- Adweek's third annual rankings of the 2022 fastest-growing agencies in the US and globally included 75 agencies. The top 10 agencies (from 4,007% to 339% growth): Movers+Shakers, Alto, The Stable, The MRN Agency, Headlight, Socium Media, The Snow Agency, Refinery89, Media Matters Worldwide, and Bray and Co. All but Refinery89 (Spain) are US agencies.
- The Human Rights Foundation and its agency Taxi (a
 VMLY&R company) won Best in Show in the 2022 ANA
 Multicultural Excellence Awards for the campaign
 "Uncomfortable Truth," which informed consumers that their
 fashion purchases could be unknowingly funding forced
 labor practices in China. The campaign provided shoppers
 with tools to help them avoid buying such clothing.
- Momentum Worldwide was named Agency of the Year at Adweek's Experiential Awards 2022.

Noteworthy quotes:

- "Nail it, share it, scale it!"—Nicole Vinson, VP, Global Digital, Media and Omni-shopper Experience, Kellogg Company
- "Having a 'hard' conversation with a client can be daunting. But the reality is these are the kinds of conversations our clients pay us to have.
 Teri Brady, Managing Director, Mother New York
- "It's easy to keep saying yes to everything a client wants, but always remember that they have come to you for your advice and expertise, so you wouldn't be doing your job if you didn't question their approach or thinking."—Ellie Bissett, Account Director, ShopTalk/DEPT

- "We're not just plastering the world with ad campaigns, we're delivering unique solutions to consumers based on those signals and their needs."—Kristen Colonna, VP Marketing Accelerator, Pernod Ricard
- "I disliked being 'managed.' I hated being hoodwinked. I despised being lied to. Grow up. Own up. Clear up. The best client-agency relationships are based on respect."—Kev Chesters, Strategy Partner, Harbour
- "Best thing you can do for your in-house agency is use the annual plan to develop a scope for what assets will be produced in-house."—Andrea B. Ruskin, Partner & Co. Founder, Blum Consulting Partners
- "A culture of creativity does not just happen. It has to be carefully cultivated and developed by those charismatic leaders, whose behaviors create energy from the very start."—Avi Dan, Founder and CEO, Avidan Strategies
- "We're seeing our brands that offer consumers a sustainable choice are growing much faster."
 —Alan Jope, CEO, Unilever
- "Although most brands have experimented with emerging tech, there is still a lot of IDK and WTF attached to AR, VR, AI, ML, NPC, NFT and web3." —Dickon Laws, Global Head of REALITY, Ogilvy
- "I as a marketer want to build my brands by distinctive propositions, but I also need to see return on it."
 —Gary Osifchin, CMO and GM, Hygiene US, Reckitt
- "I'm a firm believer that creative should be at the table with products, with designers, engineers, marketers, all working from the same insight." —Hiroki Asai, Head of Global Marketing, Airbnb
- "Consultants are constantly knocking on clients' doors saying, 'Hey, you know it's time to take a look.' That's the bad side of the business, because to me magic happens when you build long-term relationships and trust. And I know there's a big fiduciary responsibility. Do not take that for granted. So, you know, do some auditing, which clients should do. But [be aware of] the amount of effort and time it takes to re-educate an agency and partners, and the disruption and the change."

 —Bill Koenigsberg, CEO, Horizon Media

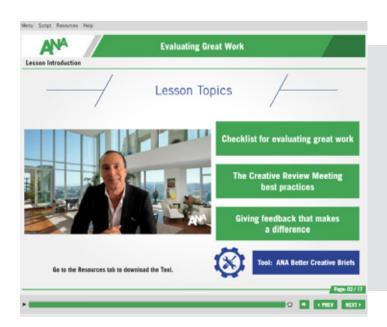
ARTICLE: Content that Connects: Jillian Gibbs Dispels Production Myths

Contributed by: Advertising Production Resources (APR)

APR's founder and global CEO speaks to LBB's Adam Bennett, in collaboration with Comcast Technology Solutions, about the evolving role—and definition—of 'craft' in the production world.

www.lbbonline.com/news/content-that-connects-jillian-gibbs-dispels-production-myths





The ANA's School of Marketing launched an updated version of its on-demand **Agency Management training** from instructor Bruno Gralpois.

This 90-minute workshop is extremely valuable for a manager new to agency management and a great refresher for senior professionals or team leaders who want to improve their relationship with advertising or marketing agencies and get greater value from their partnerships.

Topics include how to give effective creative feedback, best in class scope of work practices, briefing, and more. For more information: www.ana.net/ondemand/show/id/OD-AGM07



Check out <u>Kantata's podcast session</u> in which Bruno Gralpois takes listeners through his journey crafting org design and collaborative principles within large brands to help them gain better work from their agency partners. He also discusses key factors that help govern a mutually beneficial client-agency relationship.



FINANCIALS: Driving efficient use of resources

After many big tech stocks suffered a brutal selloff following disappointing quarterly earnings,
Apple is now worth more than fellow tech giants
Alphabet, Amazon and Meta combined, with
a market value of \$2.3 trillion. The global supply chain
isn't over—it's reinventing itself, according to Accenture.
Naturally, we hear of CMOs bracing for impact and asking
agencies for contingency plans in case we experience
even greater financial turbulence. Many companies have
announced layoffs, including Amazon, Meta, Salesforce,
Microsoft and Warner Bros. Discovery.

- Per Interbrand, the overall brand value of its 100 Best Global Brands in 2022 exceeds \$3 trillion for the first time—a 16% increase since 2021. Apple is considered the best brand in the world. Microsoft (#2), Tesla (#12) and Chanel (#22) have seen the greatest YOY percentage growth, all increasing brand value by 32%. Microsoft, with a \$278 million valuation, took Amazon's #2 ranking. Nike entered the top 10 for the first time. Airbnb (#54), Red Bull (#64) and Xiaomi (#84) are new entrants for 2022.
- Midterm political ads reached \$4.7 billion in total campaign media spending for US Senate, US House, gubernatorial and other key races. The total includes TV, radio and digital advertising from Dec. 28, 2021, through Election Day.
- Keurig Dr Pepper issued an RFP for its PR agency search, asking agencies to either agree to exceptional 360-day payment terms (compared to 60- to 120-day industry standards) or obtain financing from a third-party bank, raising concerns over unfair partnership practices.
- Per Advertiser Perceptions, 35% of advertisers say
 they have reduced their 2022 advertising budgets (by
 15% on average) due to macroeconomic factors such
 as inflation and/or supply chain disruptions. 60% of
 those who have cut their ad spending said they plan to
 reinstate "some or all" of it during the holidays.
- Per ECI Media Management, advertising costs will
 rise 6.2% this year in North America and 5.2% globally,
 mostly driven by aftereffects of the pandemic, the war
 in Ukraine, rising fuel prices and a potential recession.
 2022 US ad spending currently is projected to rise 11.8%
 when combining forecasts issued by Dentsu, GroupM,
 IPG Mediabrands' Magna and Publicis Media's Zenith.
- Google agreed to pay a \$400 million fine for illegally tracking users' locations. The fine indicates a new level of scrutiny of data privacy and security practices and potential violations, with enforcement heating up for companies collecting data.
- Per eMarketer's updated forecast, digital will account for 71.8% of US media ad spend in 2022, up 16% YOY, reaching \$248.72 billion in the US. In 2026, digital ad spending is forecast to reach \$385.47 billion and make up 80.9% of total media ad spend. In 2022, for the first time, video will account for one-third of digital ad spending as the dominant display ad format (over banners). Search will account for 40.6% of digital ad spend.

- Per Omdia, by 2027, TikTok's global advertising revenue will surpass the combined ad revenues of Meta platforms and YouTube. TikTok is projected to increase its share from 15% to 24%. Global online video advertising will rise from \$189 billion in 2022 to \$331 billion in 2027—exceeding subscription video-ondemand revenues of \$127 billion by 2.6 times, and TV advertising's \$159 billion by 2 times.
- Per R3, through the first nine months of 2022, the top 20 US media agencies saw **new business billings** decline 35% compared with the same period a year ago, while their creative counterparts saw a 48.6% plunge. Worldwide, new business billings for top media agencies fell 35.5% and declined 27% for top creative agencies.
- Per Ad Age, the cost to air a 30-second commercial on prime-time TV declined in 2022. Of the 61 returning series on broadcast TV, 30 saw the cost for a 30-second commercial decline by more than 5% compared to last season. One exception: NBC's Sunday Night Football has an average cost of \$828,501 per 30 seconds, up 2% YOY.
- CPG giant P&G cut marketing spending for the second straight quarter without impacting its performance, shifting to digital and in-house buying to fuel greater efficiency. Approximately \$200 million in overhead and marketing efficiency savings last quarter were not reinvested into media but went to the bottom line.
- CPG giant Unilever cut nearly \$1.2 billion in costs due to sustainable sourcing, challenging the idea that adopting a sustainability-driven mission is bad for business.
- Per Campaign, holding company Publicis Groupe
 allocated \$50 million in "exceptional bonuses" to half of
 its employees to recognize efforts contributing to record
 quarterly earnings (delivering double-digit earnings
 growth for the third quarter in a row), as well as to
 address inflation.
- Per Meta, Apple's privacy changes and Apple's AppTrackingTransparency feature may cost the social media giant \$10 billion in advertising revenue in 2022 alone.
- Ciesco reported 1,590 M&A transactions in the first three quarters of 2022 in the technology, digital and media sectors, an 18% increase YOY and a 92% increase compared to 2020, with a total value of \$64.6 billion, a 42% decrease from Q3 2021. Two megadeals were The Nielsen Company acquired by Evergreen Coast Capital for \$16 billion and Zendesk acquired by Permira for \$10.2 billion. Private equity firms continue to be a strong buyer category in the sector, making a total of 683 acquisitions. Consultancies, tech companies and media owners contributed to an increasingly diverse buyer universe, driven by the need for smart use of data, seamless UX, e-commerce and subscription models.



Holding company financial performance:

- WPP reported \$3.5 billion in revenue in Q3, an increase of 10.3% with organic growth of 3.8%. For the first nine months of the year, the company posted revenue of \$9.85 billion, up 10.2% with organic growth of 6.6%. The company achieved net new business of \$1.7 billion, including assignments from Nestlé, Tesco, Discover, H&R Block, Samsung and SC Johnson in Q3 (and \$5.1 billion net vear-to-date). GroupM led COMvergence's new business and retention global rankings for H1 2022. In creative agencies, Hogarth was the standout performer, as nine of the top 20 clients grew by double digits. Key acquisitions included JeffreyGroup (PR), Corebiz (e-commerce), Newcraft (e-commerce consultancy) and Passport Brand Design. The expected growth for 2022 is 6.5% to 7%. WPP will realize \$350 million in permanent savings as a result of multi-year transformation programs. It expects to achieve \$700 million in savings by 2025.
- Publicis Groupe reported \$3.1 billion in revenue in Q3, a 23.5% net revenue gain, with double-digit organic growth. Without the impact of currency fluctuations and M&A, net revenue growth was 10.3%. Growth was particularly strong in Europe and North America. The company's Sapient and Epsilon units reported growth of 18% and 14%, respectively. Publicis Groupe is the leader among holding companies in new business over the past 12 months with \$3.1 billion in net billings, per JP Morgan, and thanks to key wins: McDonald's, Walmart and KFC in North America and additional media business from PepsiCo. For the first nine months of 2022, the company reported a 21% net revenue increase to 9.1 billion euro with organic growth of 10.3%. The operating margin is expected to be close to 18%.
- Omnicom reported \$3.4 billion in revenue in Q3, flat YOY and net income of \$364.5 million. Organic growth was 7.5% globally but varied significantly by function (5.9% for Advertising & Media, 16.3% for Precision Marketing, 12.6% for Public Relations, 11.1% for Commerce & Brand Consulting, 5% for Healthcare, 2.3% for Experiential). The firm is targeting a 15.4% operating profit margin for the full year.
- Interpublic Group reported revenue of \$2.3 billion, slightly higher than last year (1.5% increase YOY) and organic growth of 5.6%. The company's Media, Data & Engagement Solutions segment (Mediabrands, Acxiom, Kinesso, and IPG's digital and commerce agencies) grew 3.8% organically, led by double-digit increases at IPG Mediabrands. The Integrated Advertising & Creativity segment (IPG Health, MullenLowe, etc.) grew 6.7% on an organic basis, led by IPG Health, followed by McCann Worldgroup. But digital agencies—R/GA and Huge—posted revenue declines.
- Stagwell reported revenue of \$663.8 million in Q3, a 42% gain, fueled by a record number of net new business wins in Q3 (\$86 million). Organic net revenue growth was 11.3% in Q3. For the first nine months of the year, organic growth was 16.7% and revenue was \$1.979 billion. On average, the company's top 20 clients now each generates more than \$6 million in annual revenues for the company. The newly formed company's Marketing Cloud unit is expected to generate \$140 million in revenue in 2023.

- Vivendi-owned ad-marketing holding company Havas Group reported \$657 million in revenue in Q3, a 12% increase. Organic revenue growth was 3.9% versus 17.3% in Q3 2021, a sharp decline YOY. For the first nine months of the year, Havas revenue was about \$1.89 billion with organic growth of 8.7%.
- Dentsu reported a 4.7% organic revenue decline in Q3, which the company attributed to its operations in Russia. Organic growth in the first two quarters of 2022 was 9.1% and 7.3%, respectively. Organic growth was 3.4% for the first nine months. The Middle East and Africa region was the group's top performer.
- \$4 Capital reported net revenue of 249.9 million GBP (\$294 million), an increase of 73% compared to Q3 2021. Organic net revenue growth was 29%. The firm targets to deliver full-year organic net revenue growth of 25% and full-year pretax earnings of 120 million GBP (\$140 million).

Mergers and acquisitions (M&A) activity:

- Stagwell acquired Epicenter Experience, an enterprise software company that leverages mobile and location data to map and sequence complex consumer behavior patterns (using its proprietary cloud-based technology "The People Platform"). Epicenter will become part of the Stagwell Marketing Cloud, its suite of self-service SaaS and DaaS products built for in-house marketing teams.
- Stagwell Marketing Cloud acquired "research as a service" platform company Maru Group. It allows the holding company to further leverage Hub, a scalable survey platform that allows marketers to analyze behavioral, transactional and attitudinal data in the same interface for clients like Mercedes, Johnson & Johnson, Disney, Microsoft and Expedia.
- Publicis Groupe acquired Prague-based affiliate marketing agency VIVnetworks. VIVnetworks, with over 900 merchants in 27 countries, will be integrated with Publicis Groupe's global performance marketing platform, CJ, and will work with the Groupe's Profitero and CitrusAd units as well as identity solution Epsilon.
- Havas Group acquired Bastion Brands, an independent health communication agency with offices in Melbourne and Sydney, Australia. The agency, which specializes in pharmaceutical and consumer health marketing communication, will integrate into Havas' global health network, Havas Health & You.
- Gaming and entertainment media giant IGN acquired global strategic partnerships agency 1TwentyFour, based in Los Angeles. 1TwentyFour will be a standalone IGN division and serve as an in-house brand studio that enables marketers to "connect with millions of fans across more than 100 countries and 250 million monthly users around the world on over 35 platforms."
- Digital marketing agency Croud acquired global social media agency Born Social to strengthen its brand and creative offer, still operating as its own brand but "powered by Croud." Born Social clients include Nandos, Guinness, Primark, Uber, Seedip and Jägermeister.



Noteworthy quotes:

- "We are now in the times when defense can convert to offense."—Matt Prohaska, CEO and Principal, Prohaska Consulting
- "Inflation will be a big part of the marketing procurement agenda in 2023. However, it is important to understand where the inflation will impact the advertiser and where marketing partners will claim it is an issue."—Christine A. Moore, Managing Partner, Raus Global
- "In the next few months, if you have not already been asked, you're going to be asked to cut your budgets, you're going to be asked to find ways to save money."—Bob Liodice, CEO, Association of National Advertisers
- "Consider all the supply chain disruption we've experienced in the past 30 months. It's no surprise we've reached this critical inflection point. Companies are moving beyond just figuring out how to respond to disruption."—Renato Scaff, COO, Accenture North America
- "Digital transformation remains a key focus of the businesses globally. This, with the need for further and more effective consolidation, is playing a significant role in driving the M&A activity in the sector."—Chris Sahota, Founder & CEO, Ciesco
- » "It's not enough to make savings; you have to make them intelligently."—lain Seers, CEO, RightSpend

From our friends at COMvergence:

In the US alone, there were 126 account moves and pitches for a total of \$7.3 billion in Q1 through Q3 2022. The 20 largest pitches (spend ≥ \$90 million) represent 65% of the total spend, including six whose media spend is equal or greater than \$300 million: RBI (Burger King, Tim Hortons, Popeyes Louisiana Kitchen), Liberty Mutual Insurance, AB InBev, Mondelez, Merck and Discover Card. Fourteen pitched accounts were successfully retained by the incumbent agency, representing a total spend of \$1.8 billion (or 24% of the total).

The retained accounts include Liberty Mutual (\$492 million), Merck (\$288 million) and Teva Pharma (\$85 million) by Initiative, Mondelez (\$300 million) by Spark Foundry and VaynerMedia, and Ferrero (\$238 million) by Mindshare. Initiative, PHD and Mindshare recorded the best performances. At the group level, Mediabrands (IPG-owned agencies Initiative, Mediahub and UM) ranked first in terms of total new business value, thanks to 16 new client wins (\$570 million) and three retentions (\$865 million).

Major Concluded Global and Multi-Country Media Reviews Q1-Q3 2022



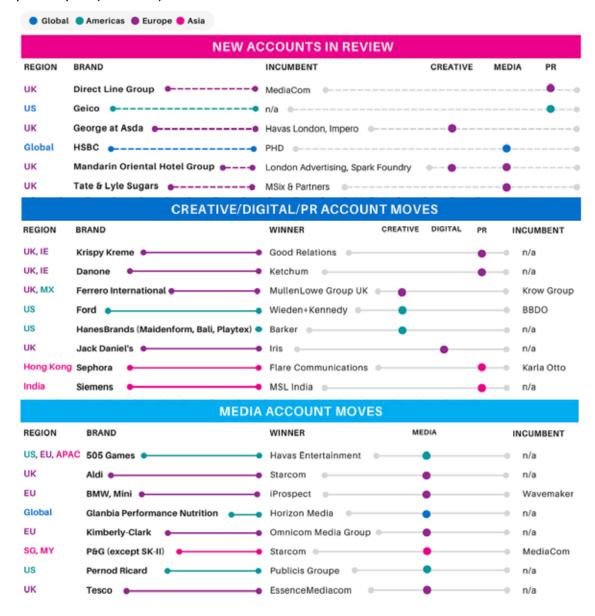
Automotive
Alcohol
Sports & Clothing
Financial & Insurance
FMCG (Proceal/Home care)
FMCG (Proceal/Home care)
FMCG (Proceal/Home care)
FMCG (Proceal/Home care)
FMCG (Food & Soft Dirinks)
Games, Toys, Leisure, Gambling
IT & Technology
Luxury
Media & Entertainment
Restaurants
Restaurants
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Appendix 126 Pitches and Account Moves Assessed

| Advertiser | Category | Budget (MS) | Assignments | No. | Agency | Last Incumbers | Country of with | James assurem |
|-------------------------|--------------------------|-------------|----------------|--|-------------------------|-------------------------|--------------------|----------------|
| DeSarghi | Home Steels | 13 | 80,040 | AROPEN (IN / FR.) DON / NAO / CHIS DIS | Mediaphia North America | Wavenotor | 2002 00 | Local |
| Discover Card | Rinancial & Insurance | 306 | BITLINAN | 0% | Minhhare | dentru X | 3002-00 | Soci |
| Discover Card | Research & Provinces | 87 | BITLINAS | ADDRESS (NY / PRE/ DOM / AND / CAD | Minhhare | Spark Foundry | 2023 03 | Local |
| Oursell | Morne Goods | 15 | 800,006 | 0% | Mediacom | Julylish | 3003 00 | Local |
| Garge | Mostfloate | 20 | BOLDAN | AROTEN DY / FRU DON / AND / ENG DIS | UM | MMS | 2002 08 | Social Control |
| Schoffark Automotive | Automotive | | BIX.DAR | ADDRESS (NY/ME) DON/MAD/CAS DIS | VaynerMedia | Various | 2023 03 | Local |
| Glaterra | Saft@rinks | 39 | BUT, PLAN | APORTON (IN / PRU) DON/ RAD / CINE DIG | PHD | Mindshare | 3102 08 | Status |
| Sections | Saturday removed & Modes | 2 | BIX.DAR | ARREST (NY / PRI/ DOX / RAD / CAS DIS | Canvas Worldwide | N/A | 2003 Q8 | Book |
| Onlie Lauder | Personal Gare | 90 | BUY, PLAN, SAA | 046 | Media Monis | Propos | 2003 00 | best |
| Seat Sciences | Remember | 159 | BIX.PLAN | AROPE (Nr / FR) DOW/AND / CHE DIS | OMO | Publick Health Media | 2023 08 | Securi |
| FedEx | Services | 112 | BIX.PLAN | ARREST (NY/ME) CON/MAR/ACAG DIS | Hearts & Science | CHIED | 2002.00 | Local |
| femere | Food | 238 | BIRL PLAN | AROTE (TV/FRL/DOX/RAD/COS DIS | Mindshare | Retained | 2002 00 | SHIP |
| First Republic Bank | Pinancial & Incurance | 39 | BUT, PLAN, MA | 040 | Performics | N/A | 2023 08 | Local |
| Focus Brands | Redusers | 30 | BIRLINAN | AROTTO (NY / NY / NO / NO / NAO / CING ON | OMO | Various | 2002 00 | Local |
| Frantier Communications | Selectors | 47 | NOCESAN. | AROTE (Nr / FRL) DON / RAD / CHG DIS | Starcom | Trilla | 2023 03 | Lease |
| General | Mamagazioli | 7 | BIOLINAN | Another (N/He/ cox/aso/cos) on | Convex Worldwide | N/A | 2003 00 | Local |
| Gart Egle | Betail | 34 | BUY, PLAN | AROTTO (NY / NY / NO / NO / NAO / CING ON | Inhouse | min&Portners | 2002 00 | Secret |
| Great Day Improvements | Real future | 35 | BIX.PLAN | ADDRESS (NY / PRO / DOM / AND / CING DIS | Horizon Media | N/A | 2023 03 | Local |
| Grubmab | Ordina Road Ordaning | 79 | BIRLAUAN | AROMEN (IN / HE / DOM / AND / CING DIS | UM | Various | 2002 08 | book |
| Guardiani Health | Demandor | 4 | 80,040 | ADDRESS (BY / PRE) DOM / NAME / CASE DIS. | Hora Media | N/A | 2003 08 | Local |
| Helmiten | Alachel | 195 | BOY, PLAN | AROTTON (NY/MEL/DOM/MARY/CINE DIS | dentas X | Carren Worldwide | 2002.02 | Soci |
| Hey Dude | Gutting | 90 | BIX.DAY | APORTING DY / PRU DOM / SAD / CAS DIS | Digital | N/A | 2003 00 | South |
| Hydrow | Sports | 30 | BUY, PLAN, SA | 046 | Performica | VaynerMedia | 2002 08 | Local |
| imposible Foods | Pont, Retail | 3 | BITLIPLAN | ADDRESS (NY/YES/ DOX/AND/YES) DIS | Horizon Media | Mediacom | 2003 00 | South |
| insmed | Persental | | BIX.DAR | APORTO- (NY/PRI/DOM/RAD/CAS DIS | dentau X | N/A | 2003 08 | Securi |
| Insurance Johns | Financial & Insurance | 34 | BALAM | AROTEN (NY/ME) DOX/MAY/ENGING | OMO | Assembly | 3003 02 | bool |
| Mes | Between | | MIN.PLAN | AROTE (TV / FR.) DOX / RAD / CNG DIS | militalFartners | N/A | 2002 08 | SWOOL |
| Ohnney | Retail | 365 | BINLALAN | ALORS (N/FR) COX/RAD/CAS DIS | dontou X | CHED | 2003 98 | Local |
| Kaiser Permanente | Healthcare | 83 | BUYL PLAN | AROTTO (TW/FRE/ DOM/TARE/FEING DIS | Hearts & Science | Compiled Durald | 2003 08 | Local |
| Kelogi's | Read | 40 | MIN, SCOM, MA | Des | Starcom | Ppubori Digital | 2002 00 | Local |
| WC. | Antoporto | 294 | BOY, PLAN, SOC | ARIOTEN (NY/ME)/DOM/MARY/DAG DIS | Spork Foundry | Windowskiewnedy (media) | 2002 08 | Later |
| No. | Retail | 274 | NO. P. AN | AROPEN DV / FRU J DOW / AND / CHA DVS | Horizon Media | South | 2003 00 | Same |



Per R3's pitch report (Q4 2022):



R3's 2023 Global Pharma Agency Family Tree looks at both holding company and independent agencies providing full service, communications, branding and design, and consulting capability.





AGENCY: 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.

- Tech giant Adobe kicked off a review of its global media agency account with the intention of consolidating work with one agency. GroupM's Wavemaker handles the client's US and EMEA regions and is expected to defend.
- Celebrity Cruises selected Interpublic Group of Cos.'
 Mediahub as its media AOR in North America following
 a review, replacing incumbent Dentsu's Media Storm.
 Mediahub handles North American media for Celebrity's
 parent company, Royal Caribbean.
- SaaS company **Dropbox** selected Stagwell's Gale as its global media AOR following a review, replacing incumbents Interpublic Group of Cos.' Mediahub (in the US) and S4's Media.Monks' Metric Theory. The agency will handle all media activities in North America, Europe, Asia and Australia.
- Ford Motor Company selected independent
 Wieden+Kennedy as its global AOR for creative and
 brand strategy without a review, replacing incumbent
 Omnicom's BBDO, which will remain on the roster to
 handle CRM in the US. Wieden+Kennedy previously
 worked with the brand, handling work in the US.
- Samsung-owned Harman International selected Havas
 Group as its global AOR for all its brands and territories
 following a review and consolidating creative and media
 activities under one roof. The agency will handle brand
 strategy, creative, content, media and production, selective
 support in social media and influencer marketing.
- Kellogg-owned natural cereal brand Kashi selected Publicis Groupe's Leo Burnett Chicago as its creative AOR. The companies have a long-standing partnership dating to 1949.
- Pernod Ricard selected Publicis Groupe as its US media AOR for Jameson, Absolut and other alcohol brands, following a review and replacing incumbent WPP GroupM's Wavemaker. The agency will handle media planning, buying and measurement, and dynamic creative optimization in partnership with the brand's in-house team (Marketing Accelerator). The holding company formed a bespoke unit called Publicis Santé to handle the client work, which resides inside its Performics performance marketing division.
- Rebel Creamery selected TDA Boulder as its first integrated AOR for the company's entire line of zerosugar, full-fat ice creams and milk products. The agency will handle strategy, creative and media.

- The Royal Navy and Royal Air Force retained House 337 (formerly Engine Creative) as lead creative AOR for the next three years following a systematic review. House 337 first won the Royal Navy account as WCRS in 2006. RAF was added to its account in 2013.
- Walmart's Sam's Club kicked off a review of its media and creative agency account. WPP-backed Haworth is the incumbent media agency. Sam's Club appointed VMLY&R as its first AOR last year, now the incumbent in the review. VMLY&R will defend.
- The Diageo-owned vodka brand Smirnoff selected Interpublic Group of Cos.' McCann as its global creative AOR (led by McCann NY) following a review, replacing Stagwell's 72andSunny, the incumbent since 2013.
- Sonos selected Stagwell's 72andSunny as its global creative AOR following a review, replacing VCCP New York and sister shop Muh-Tay-Zik/Hof-Fer, the incumbent since 2020. The agency will handle global creative and strategy for the maker of wireless home audio products and will partner with other agencies to develop brand storytelling platforms, product vision and narratives, and multi-channel advertising campaigns.
- Pharmacy and drugstore chain Walgreens Boots Alliance kicked off a review of its US media buying account for its Walgreens brand. Incumbent WPP's Mediacom is expected to defend. In 2020, the firm kept its business with WPP and its bespoke team called Team WBA.



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Agency roster summary:

| COMPANY LOGO | CLIENT | INCUMBENT | CHANGE/SCOPE | FOCUS AREA | NEW AGENCY | REVIEW? |
|--------------------------------|--|--|------------------------------------|------------------|---|---------|
| Adobe | Adobe | Wavemaker (expected to defend) | Media | Global | [Review in process] | Υ |
| Celebrity Cruises | Celebrity Cruises | Media Storm | Media AOR | North America | Mediahub | Υ |
| Signal Dropbox | Dropbox | Mediahub | Media AOR | Global | Gale | Υ |
| Ford | Ford | BBDO | Creative and Brand Strategy AOR | Global | Wieden+Kennedy | N |
| HARMAN | Harman International | Unknown | AOR | Global | Havas Group | Υ |
| Kashi | Kellogg (Kashi) | Unknown | Creative AOR | North America | Leo Burnett Chicago | UNK |
| Pernod Ricard | Pernod Ricard (Jameson, Absolut and other alcohol brands) | Wavemaker | Media AOR | US | Publicis Groupe | Υ |
| Rebel | Rebel Creamery | None | Integrated AOR | Unknown | TDA Boulder | UNK |
| ROYAL | Royal Navy | Unknown | Lead Creative AOR | UK | House 337 (formerly Engine Creative) | Υ |
| OROYAL AIR FORCE | Royal Air Force | Unknown | Lead Creative AOR | UK | House 337 (formerly Engine Creative) | Υ |
| sam's club 🔷 | Sam's Club | Haworth | Media | Unknown | [Review in process] | Υ |
| sam's club 🔷 | Sam's Club | VMLY&R (defending) | Creative AOR | Unknown | [Review in process] | Υ |
| SMIRNOFF | Smirnoff | 72andSunny | Creative AOR | Global | McCann | Υ |
| SONOS | Sonos | VCCP New York and Muh-Tay-Zik/Hof-Fer | Creative AOR | Global | 72andSunny | Υ |
| Walgreens Boots Alliance | Walgreens Boots Alliance | Mediacom (expected to defend) | Media | US | [Review in process] | Υ |
| | | | | | | |

