

# Industry Updates

LOOKING BACK AT 2022:

Trends, news, and future thinking—  
and how they will impact 2023.





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## EXECUTIVE SUMMARY: Yearly recap

Let's face it. 2022 challenged us all. It's now time to review the many profound changes that impacted advertising, how we produce it and how it's impacting the way brands and agencies come together and collaborate to create outstanding work. Our regular industry updates are meant to summarize, synthesize, organize vast amounts of information. Each news story is a small piece of a giant puzzle that only makes sense when we step away from it long enough to make sense of it. This is the time of the year again when we look holistically at what happened across all facets of our industry and anticipate what this all means for this coming year.

So, get a cup of coffee or a glass of (French) wine and find a comfortable place to read. This is a summary of all the industry updates of 2022.

### Major themes

Every year I put this summary together, I am in complete awe of how much happened in the last 12 months. It's a daunting task to pick one word to sum it up. "Inclusion" was voted ANA 2022 Marketing Word of The Year. Runners-up were "hybrid" and "metaverse." If you ask me, those are as worthy as words like "responsible advertising," "resilience," "digital only," "fast-vertising," "global unrest," and many others that saturated our news channels.

So, what were the most significant and impactful drivers of 2022? Well, I am glad you asked. Here is my selection:

#### **ALL DIGITAL: The ever-expanding digital economy profoundly changed marketing and its supply chain**

In 2021, the major theme was centered around e-commerce and digital growth, fueled by years of COVID. Those phenomena permanently altered the agency landscape. In 2022, we realized that no company could grow or even survive without a digital business focus and strong digital capabilities, in-house or externally sourced. Creative + media + e-commerce is the new equation for effective modern marketing. Traditional advertising seems, well, dated. Digital now accounts for the majority of ad spend around the globe, and a new supply chain composed of specialized agencies is emerging to support it. In the US, digital was over 71% of media ad spend in 2022, up 16% YOY. In 2026, digital ad spending is forecast to reach \$385.47 billion or 80.9% of total media ad spend. In 2022, for the first time, video accounted for one-third of digital ad spending as the dominant display ad format (over banners). Search accounted for 40.6% of digital ad spend. Digital is ruling the ad world. Naturally, brands also experimented with digital-native concepts—NFTs, AR/VR, AI, and the metaverse. Agencies such as Accenture's Nth Floor and WPP's Metaverse Foundry are even building dedicated metaverse practices.



#### **NOW: Everything is now built for speed**

In 2021, agencies explored new creative and innovative ways to service clients. In 2022, brands wanted to accelerate their efforts, innovate, test, learn quickly, and ultimately move at the speed of cultural moments. 2022 was the year of "fast-vertising." Hybrid work officially changed agency culture but also how work got done with a constant focus on efficiency, productivity, and time savings. Technology has been (and continues to be) a huge enabler of that. We are experiencing tremendous acceleration in agency capabilities, how talent is managed, and the way work is being produced. It's clear that the path is forward and built for speed. It's impacting in fundamental ways how clients and agencies work together. It's impacting how we recruit, motivate, train, and encourage creativity. Brands are moving at light speed to meet consumer demands. They are asking their agencies to keep up, or better, lead the way.



#### **DOING (MORE) GOOD: Responsible marketing is grounded into a lasting social agenda**

In 2021, commitment to diversity and inclusion became a reality. Yet, consumers and, therefore brands, had far greater ambitions for what being responsible citizens and organizations mean. 'Doing good' and environmental rally became an even greater priority for brands and agencies. The Gen Z is on the rise. The "activist generation," Gen Z, is all about more purposeful consumerism. Today, consumers demand more—a reality across a wide range of environmental, political, and economic issues. It has significant long-term operational impact on how we work and what and how we produce. It ranges from greater diversity and inclusion to environmental agendas to more controversial topics like gun advertising or responsible social media practices. Ogilvy UK made the decision not to work with influencers who retouch their bodies or faces. Nestlé chose to stop advertising its ice cream, confectionery and beverages with added sugar brands to children younger than 16. In 2022, the ad industry introduced new metrics like "carbon performance indicator" to reduce carbon emissions generated by advertising campaigns. AdGreen launched its Carbon Calculator. The world of advertising once again answered the call. Some agencies like Edelman even announced that it would "part ways with clients" that don't adhere to its new environmental, social, and governance guidelines. And consumers are warning brands and agencies: be genuine about it. No "greenwashing" (or misleading environmental claims).



#### **TOO COMFORTABLE? Brands changed agencies faster and more frequently**

In 2021, remote pitching facilitated a renewed level of competitive agency reviews. In 2022, reviews across media, creative and other disciplines happened at a faster pace as illustrated by the number of roster changes that year. A study indicated that 69% of advertisers have recently made or plan to make changes to their agency roster. In media, there were over 100 account moves and pitches in the US alone in 2022, for a value of \$10 billion, with big reviews like Mondelez International and ABInBev. Only 24% of the accounts were retained by the incumbent agencies.



And it's far from being over: 38% of advertisers are likely to end their current ad agency relationship because of client leadership changes or a perceived lack of strategy, team turnover and agency staffing gaps, unresolved trust issues and so on. In 2022, many brands say they had too many agency partners. They pushed to simplify, streamline, and reduce excessive overhead whenever possible. Others wanted to bring marketing duties in-house or change their agency model. The message from brand leadership is clear: don't get too comfortable. Kicking off a review is no longer a sign of profound issues. It's now a fundamental recurring business practice.



### **STRONG(ER): Holding companies rode the wave and had record financial results**

In 2021, large holding companies bounced back (financially). In 2022, they broke financial records with double-digit, organic growth and profits. The holding companies and global networks are back on the rise after a pre-pandemic slump as clients seek integrated partners over independent agencies. They cut expenses during the COVID years. For example, WPP will realize \$350 million in permanent savings as a result of multi-year transformation programs. The firm expects to achieve \$700 million in savings by 2025. Profitability soared in 2022. Publicis Groupe's operating margin is expected to be close to 18%. Omnicom is targeting a 15.4% operating profit margin for the full year. Even the smaller holding companies like S4 Capital and Stagwell grew significantly in 2022 with record financial performance, showing that the entire sector is healthy. The agency world matured and streamlined business operations with remote working, reduced office space and a reduction in expenses. Will they maintain that level of performance going into 2023? They are naturally projecting more conservative numbers as uncertainty around economic conditions rises to new levels and a recession impacts talent, operating costs, and profitability.



### **MAINSTREAM: In-house agencies became an inevitable reality for agencies (as well as talent shortages)**

In 2021, the in-house agency phenomenon accelerated and matured. Today, an estimated 80% of brands have an in-house agency of sort, and those who don't are considering establishing one. So in-house agencies are now mainstream. They have their own conferences. They have their own challenges. They are also ramping up in size and scaling operations. In-house teams, like PepsiCo Beverages North America's 52-person Content Studio, developed more than 1,400 unique content assets in a single year. In 2022, beyond co-existing, in-house agencies were an important part of how brands work with their external agencies as well. The motivation and drivers to move to an in-house model didn't change that much: cost savings (76%), improved speed (73%), and increased productivity (52%). The number of people on in-house agency teams are expected to grow as is the level of sophistication in the way those teams are managed and optimized. This is impacting how agencies look at their own capabilities, resource planning and talent needs. And talent was indeed center stage in 2022. Agencies are embracing flexible business models to address macro uncertainty. As talent scarcity continues, potentially through years to come, agencies and brands are desperately exploring new ways to attract and retain people.



### **TIGHTENING: Brands and agencies prepared for difficult economic times**

In 2021, we also witnessed a return to growth and business fundamentals. In 2022, after a disruptive COVID, the world struggled with another major unsettling event: Russia's invasion of Ukraine. Global economic challenges, including the impact of the war in Ukraine, the lasting effects of the COVID-19 pandemic, rising inflation, and supply-chain disruptions, caused uncertainty and volatility in the entire global industry. In 2022, brands and agencies had no choice but to prepare for potentially worsening economic conditions. Advertising costs were expected to rise 6.2% in North America and 5.2% globally. To counter this, the industry benefited from a vibrant midterm election in the US and one of the world's largest sporting events, the FIFA World Cup. As expected, financial strength and effective and rigorous expense management became urgent priorities. For example, CPG giant Unilever cut nearly \$1.2 billion in costs due to sustainable sourcing; 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. Many advertisers reduced their 2022 advertising budgets (by 15% on average). What should we expect in 2023? Well, the world seems divided on that topic. One-third of the biggest advertisers are planning to keep budgets flat in 2023. Another one-third is planning to cut ad budgets. And the remaining one-third is planning to increase them. In any crisis, some see opportunities to thrive.



#### **In summary:**

2022 Was the year of records and surprises. The tech behemoth Apple, considered the best brand in the world, became the first US company to hit \$3 trillion in market value, adding its latest trillion in fewer than 17 months. The 100 Best Global Brands in 2022 exceeds \$3 trillion in brand value for the first time—a 16% increase since 2021—showing the resilience of this industry. Yet, as I anticipated, 2022 proved to be a year of learning and adjustments for most. With some setbacks, it wasn't all pretty. The macroeconomic struggles fueled innovation and prompted quicker, faster experimentation, as is often the case in challenging times. Brands and agencies built stronger relationships under pressure. They learned to do things differently. As challenges mount, that client/agency partnership has never been more important than it is today. Improving standard partnership practices, such as client input briefing, scoping and financial management, reconciliation and reporting, client/agency performance evaluations, and others, has become even more critical when addressing those existing challenges and new opportunities that emerged at the end of 2022.



Looking forward to being part of that journey with you all. Wishing everyone a happy and successful 2023!

**Bruno Galpois**  
Co-Founder and Principal  
Agency Mania Solutions

# Agency

## Roster changes summary









## Automobile

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- **The Auto Club Group** (the second-largest AAA club in North America) selected Publicis Groupe shop Digitas as its integrated lead agency, the brand's first agency partnership since it worked with The Richards Group in 2016. The agency will handle media, creative, and data management out of its Chicago, Detroit, and Atlanta offices.
- **Honda UK** selected Karmarama, part of Accenture Interactive, as its lead creative agency, following a review. The agency retains the account after an extensive 18-year relationship with the brand.
- Tire giant **Michelin** selected Ogilvy Experience as its global customer relationship management AOR after a review. From Paris, the agency will rely on its extensive global network.
- German car maker **Audi of America** selected WPP's Ogilvy as its new creative and strategic AOR, expanding its existing relationship with the brand in South Africa, China, and Germany and replacing incumbent Venables Bell & Partners.
- **Volvo Trucks North America** selected Raleigh, North Carolina-based agency Baldwin& as its creative AOR following a review. Previously the brand worked with several agencies and there was no incumbent. The agency has been the brand's social media AOR.
- The Volkswagen Group luxury brand **Bentley Motors** selected Interpublic Group's McCann Worldwide as its new lead creative and strategic AOR, replacing incumbents Keko London and Minneapolis-based Solve, and using an open architecture approach with strong geographical coverage.
- Used car dealer **Echopark Automotive** selected VaynerMedia as its first AOR following a review in a move to expand its footprint and invest in marketing to build the brand through digital media. The agency will handle all duties, including creative, strategy, analytics, and social.
- **BMW Group** selected Dentsu's iProspect unit as its agency for "offline" media (planning and buying) for its BMW and MINI brands across 24 markets in Europe following a review, replacing incumbent GroupM's Wavemaker. The agency previously handled nine of the European markets. The Marcom Engine will continue to handle online media for BMW Group in Europe.
- **General Motors** selected small Atlanta-based creative firm Majority as AOR for branded diversity marketing initiatives, including work on electric vehicles. The agency will join a small roster of multicultural agencies: Carol H. Williams Advertising, Spike DDB and Casanova.
- **Hyundai Motor America** selected independent Houston-based agency Lopez Negrete Communications as its US Hispanic marketing AOR following a review, replacing incumbents LatinWorks and Omnicom's Del Rivero Messianu DDB, Miami. The agency will handle various advertising and marketing services, experiential and social media strategy, and consulting on media buying decisions.
- **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.

## Consumer Packaged Goods (CPG)

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- Amsterdam-based paint maker **AkzoNobel** selected Interpublic Group's Mediahub as its first global digital media AOR, following a review, replacing incumbent WPP's MediaCom, which retains offline media planning and buying. The agency will rely on its sister company, Acxiom.
- **E-Cloth** selected Rinck Advertising as its first integrated AOR, following a review. The agency will handle brand strategy, creative, consumer insights, content, digital, and media buying and planning.
- **Reynolds Consumer Products** selected Omnicom Group's DDB Chicago and Hearts & Science as creative and media AORs respectively, following a review, replacing 12-year incumbent Havas Chicago. The agencies will handle all RCP work including the Hefty Business Unit.
- **SC Johnson** retained Omnicom Media Group as its global media AOR following a review. The agency will support the portfolio of brands: Windex, Ziploc, Glade, Drano, Pledge, Scrubbing Bubbles, Raid, Stem, Method, Mrs. Meyer's and Babyganics.

## Entertainment and media

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- AT&T's WarnerMedia streaming platform **HBO Max** kicked off a review of its creative account. Incumbent Omnicom BBDO is expected to defend.
- Sports entertainment company **Topgolf** selected Stagwell Group's Anomaly as its creative AOR following a review, replacing the incumbent of more than 10 years, Converse. The agency will work with media AOR Mediahub and social AOR Day One.
- **AMC Networks** selected creative and media agency Known as its global media AOR following a review, replacing incumbents Dentsu and Allied Global Media. The agency will handle all media for the flagship network AMC and portfolio sibling networks BBC America, IFC, WE tv and Sundance TV as well as streaming services.
- Lottery distribution platform **Lotto.com** selected Havas as its first creative AOR following a review. The agency will handle elevating Lotto.com's awareness and create the platform's first brand campaign.
- **Legoland Resorts of North America** selected Lexington, Kentucky-based Cornett as its first creative AOR following a review. The agency will support all three US resorts and hotels, collaborating with Universal McCann, which remains the brand's media AOR.
- Gaming engine company **Unity** consolidated its global media assignment with S4 capital's Media.Monks following a review. The client previously worked with various agencies. Media.Monks will handle media strategy, planning and buying, measurement and anything related to VR, Web3 and metaverse.



## Financial services

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- Investment software platform **iTrust Capital** selected Huntington Beach, CA-based agency Ocean Media as its media AOR. In addition to traditional media planning and buying duties, the agency will provide data libraries and dashboards to track cross-channel performance metrics.
- Financial information and analytics company **S&P Global Inc.** selected creative agency Joan as its lead global agency. The agency will handle all things related to strategy and creative.
- Personal finance company **NerdWallet** selected creative marketing agency Deutsch LA as its new lead creative AOR in the US, following a review and replacing incumbent ARGONAUT.
- **Santander** selected dentsu-owned Carat as its AOR for the UK, Spain, and Portugal, following a review. Carat has been working for the brand in the UK for 20 years. Fellow dentsu agency dentsu X won the account for the US and Poland.
- **Discover Financial Services** selected GroupM's Mindshare as its new US media AOR following a review, replacing incumbent Publicis Groupe's Spark Foundry. The agency will handle full-funnel marketing and media efforts, audience and media strategy, planning, investment, measurement, and data and analytics.
- **Prudential Financial** selected Interpublic's McCann as its new creative and advertising AOR following a review, replacing incumbent StrawberryFrog, which did not participate. Prudential's in-house creative unit will collaborate with the agency on marketing efforts including strategy, campaign execution, and the development of creative assets.
- **Canadian Imperial Bank of Commerce** selected Toronto-based agency No Fixed Address's Courage as its creative AOR following a review. The bank also selected Oliver to build and run its bespoke production in-house agency.
- Private German banking company **Commerzbank** selected Publicis Groupe's Leo Burnett as its advertising communication lead agency following a review.

## Food and beverage

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- Fast food chain **KFC**, part of YUM! Brands, selected Publicis Groupe's Spark Foundry as its US media AOR, following a review, replacing the three-year incumbent agency, independent Wieden+Kennedy. The agency will handle advertising and media planning and buying across all channels, including digital and social media. Spark Foundry previously handled the US account.
- Fast-food giant **McDonald's** selected Publicis Groupe media agency Starcom to lead its US media account, without a review and replacing incumbent Omnicom's OMD, which will continue to support McDonald's USA locally and in other geos. Publicis Groupe already works for the brand handling customer data analytics and digital marketing across the McDonald's app, website, and CRM channels.

- **Wells Enterprises** (parent company of Blue Bunny and Halo Top ice cream brands) selected Stagwell's GALE as its new integrated AOR. The agency will handle creative, media, and social. Creative duties are shared between GALE and sibling agencies Observatory and Wolfgang for Bomb Pop, Blue Bunny, and Halo Top.
- Beer marketer **D.G. Yuengling & Son, Inc.** selected Omnicom's Zimmerman Advertising as its media AOR, following a review, replacing incumbent Havas.
- **Kroger** selected Omnicom DDB New York as its strategic and creative AOR for its retail pharmacy chain Kroger Health, expanding its existing footprint with the brand. DDB New York was previously named AOR for the Kroger chain of grocery stores in 2019.
- Fast food chain **KFC**, part of YUM! Brands, selected MullenLowe as its lead creative agency in the US, following a review, replacing incumbent independent Wieden+Kennedy. The brand recently named Publicis' Spark Foundry its lead media agency, following a separate review.
- **Mars, Inc.** retained GroupM's MediaCom as its global media AOR, following a review. The new contract, estimated at \$1 billion in media spend, will be effective through the end of 2025. The brand also expanded its relationship with GroupM, selecting MediaCom sister shop Essence as its "biddable media" management agency.
- Forestport, NY-based **Nirvana Water Sciences Corp.** selected Southern California-based agency SCS as its AOR. The agency will handle performance analytics, digital marketing, and digitally driven marketing strategy and execution.
- Cereal marketer **Post Consumer Brands** (Honey Bunches of Oats, Raisin Bran, Pebbles, etc.) selected Interpublic's Mediahub as its US media AOR, following a review, replacing incumbent Publicis Media's Spark Foundry. The agency will operate from its Minneapolis office with support from its entire network.
- **Steak-umm Company** selected Knoxville, Tennessee-based agency Tombras as its integrated AOR, replacing seven-year incumbent Allebach Communications. The agency will handle all of the brand's creative and media.
- **Anheuser-Busch InBev** selected incumbent Publicis Groupe as its media AOR in the US and consolidated work in other key markets (Mexico, Central America, South America, Europe, and Asia) after a review. The agency relies on resources across its network, including data and technology from Epsilon (the brand's data AOR). Dentsu retains the business in Canada and Africa.
- Fast-food chain giant **Burger King** kicked off a review of its creative account, with incumbent WPP-owned creative agency David defending. The brand, which has worked with media agencies for years, also kicked off a review of its US media business.
- Chilean wine giant Concho Y Toro-owned **Bonterra Organic Vineyards** selected San Francisco-based Duncan Channon as its integrated (mostly creative and media) agency after a review. The agency will also handle video, print, influencer, and social media.





- Milwaukee-based **Colectivo Coffee** selected independent, local agency Hanson Dodge as its first AOR without a review. The agency will handle digital marketing and media planning and buying duties.
- Food chain giant **IHOP** selected Pereira O'Dell as its new creative AOR after a review, replacing four-year incumbent Droga5, which did not defend the account. Pereira O'Dell kicked off its first campaign for the brand, "Let's Put a Smile on Your Plate."
- San Diego-based quick-service restaurant chain **Jack in the Box** selected TBWA\Chiat\Day LA as its lead creative ad agency after a review, replacing eight-year incumbent David & Goliath. The brand and TBWA previously worked together. The brand also added to its roster Maximum Effort (video content), Small Girls PR, and Conscious Minds (digital and social initiatives and content series).
- Privately held **Pabst Brewing** selected Seattle-based DNA as creative AOR for its brand Pabst Blue Ribbon and as media AOR for its full portfolio of brands after a review, replacing two-year incumbent Stagwell-owned 72andSunny (creative) and Assembly (media). The agency previously did work for Pabst's Rainier Beer and Dragon's Milk Stout brands.
- Number one producer of USDA organic chicken **Perdue Foods** selected Minneapolis-based Colle McVoy as its creative AOR after a review, replacing 11-year incumbent Via Agency, of Portland, Maine. Colle McVoy will handle creative strategy, digital, and production for all Perdue Foods consumer business, including the Perdue, Perdue Harvestland, and Perdue Simply Smart brands.
- **PepsiCo** selected Publicis Groupe as its new media AOR for China after a review, replacing incumbent WPP. Publicis Groupe created PLUS+ by Publicis, a dedicated unit led by Zenith to handle the business. The agency will handle integrated media planning and buying duties across PepsiCo's beverage and food brands, including the Pepsi, Mirinda, 7Up, Gatorade, Bubly, Lay's, Quaker, Doritos, and Cheetos.
- **Blue Diamond Growers** selected McKinney LA as its creative AOR across its Blue Diamond portfolio following a review, replacing incumbent TBWA\Chiat\Day LA. The agency will rely on its agencies in LA, NYC, and North Carolina.
- Deli giant **Boar's Head** selected DiGo (DiMassimo Goldstein) as its creative AOR following a review, replacing incumbent Hill Holliday.
- Fast-food chain giant **Burger King** selected OKRP as its creative AOR, replacing incumbent WPP-owned creative agency David. The brand also selected Omnicom Group's PHD as media AOR, replacing eight-year incumbent Horizon Media, including its Restaurant Brands International siblings Popeyes and Tim Hortons. Horizon will still work with Tim Hortons on traditional media in Canada.
- Bottled water giant **BlueTriton** selected independent agency Horizon Media as its media AOR following a review. The agency will handle all media duties, including strategy, planning, buying and analytics, for the brands Arrowhead, Poland Spring and Ice Mountain.
- UK whiskey supplier **Edrington UK** selected WPP Wunderman Thompson as its digital AOR to handle digital commerce, content and media strategy across its portfolio, including The Famous Grouse and Courvoisier, following a review.
- Dutch brewing giant **Heineken** kicked off a review of its global creative and production AOR for its 300 international brands (with the exception of the global flagship Heineken brand, still held by Publicis Groupe as part of its bespoke model, called Le Pub).
- **Heineken USA** selected Dentsu as its media AOR, replacing four-year incumbent Canvas Worldwide, consolidating media duties with Dentsu, which already handled its international media. Publicis continues to handle worldwide creative duties for Heineken.
- **Sesame Workshop**, the nonprofit behind the iconic children's TV show Sesame Street, selected Known as its media AOR following a review. The agency will handle all paid media work and optimization. The brand worked with the agency on a data audit and did project work in the two years prior.
- **Stoli Group's** agave portfolio selected Cincinnati-based Curiosity as its social media AOR following a review. There was no social agency of record prior to the appointment. The agency will develop and execute separate social media and influencer strategies and campaigns for each individual brand (Villa One, Cenote and Se Busca).
- **Bud Light** kicked off a review of its creative account for its portfolio of brands, including Bud Light, Bud Light Seltzer, and Bud Light Next. Incumbent Wieden+Kennedy NY declined participation and will continue work on Budweiser global, Michelob Ultra, Corona, NUTRL, and the Anheuser-Busch brand.
- **Beam Suntory** selected independent Chicago creative agency Highdive as its creative AOR for five of its brands, including James B. Beam and Sauza Agave Cocktails.
- Unilever-owned tea marketer **Ekaterra** selected Omnicom's PHD as its global media AOR following a review. The agency will handle traditional and digital media planning and buying (including commerce) with a "digital first mindset" in 42 markets for the Ekaterra portfolio (brands include Lipton, PG Tips, Pukka, T2, and Tazo).
- Snack brand **Harvest Snaps** selected Cutwater as digital creative AOR following a review. The agency will handle creative, digital, brand, and social strategy.
- **John B. Sanfilippo & Son (JBSS)** selected New York-based agency Terri & Sandy as its new strategic-creative AOR and NitroCagePoint as its media AOR following a review. The agencies will work across the brand portfolio, including Fisher, Orchard Valley Harvest, and Squirrel.
- **PepsiCo** selected Publicis Group India to handle media duties in that country, replacing incumbent WPP's Mindshare. This win comes after becoming creative and digital AOR for PepsiCo in India as well.
- **T. Marzetti Company** selected Columbus, Ohio-based agency The Shipyard as its integrated AOR following a review, replacing incumbent Cramer-Krasselt. The agency will handle strategy, creative, and national media planning and buying across the brand's portfolio (Marzetti Dips and Dressings, New York Bakery, Sister Schubert's, and Reames).

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Data is listed chronologically in most instances, and alphabetically in others.



- **Anheuser-Busch InBev's** Bud Light selected Anomaly as its creative AOR for its beer account and The Martin Agency as its agency for line extensions, including Bud Light Seltzer and zero-calorie Bud Light Next, following a review, replacing incumbent independent Wieden+Kennedy, which will continue to work on Budweiser global, Michelob Ultra, Corona, Nutri vodka seltzer and the AB InBev corporate brand.
- **General Mills** selected VCCP of London as its creative AOR for food brand Old El Paso for international work, following a review. The agency will deliver global campaigns across key markets (UK, France, Australia, etc.)
- Beam Suntory's **Jim Beam** selected Publicis Groupe's Leo Burnett as its global creative AOR following a review, replacing incumbent Adam&Eve DDB. The agency previously worked for the brand.
- Food and beverage giant **Mondelēz** selected Publicis Groupe to handle \$500 million in additional spending for Europe, previously handled by incumbents WPP's Wavemaker and Dentsu's Carat as well as traditional video investment, content and multicultural marketing in the US and Canada. Publicis will also handle Latin America, Europe, the Middle East and North African Peninsula, South Africa and China.
- **4 Pines Brewing Company** selected 72andSunny ANZ as its creative AOR. The agency will handle brand strategy and integrated communications.
- Restaurant chain **Red Lobster** selected independent Kansas City, Missouri-based Barkley as its creative and strategy AOR for its North America locations following a review, replacing incumbent Publicis Groupe (since 2014).
- Plant-based food company **Tattooed Chef** selected Duncan Channon as its social and digital AOR following a review. The agency will handle creative strategy, digital media planning, influencer marketing and experiential activations.
- 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 Performance marketing division.
- **Rebel Creamery** selected TDA Boulder as its first integrated AOR for the company's entire line of zero-sugar, full-fat ice creams and milk products. The agency will handle strategy, creative and media.
- 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.

## Insurance

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- **Amica Insurance** selected Mother NY and sibling unit Media by Mother as its first integrated AOR following a review, replacing incumbent Cronin.
- Insurance provider **The General** (a subsidiary of American Family Insurance) selected Energy BBDO as its new creative AOR following a review and replacing incumbent Highdive. BBDO NY already serves as AOR to American Family Insurance.
- Insurance company **Nationwide** selected WPP-owned GroupM's Essence as its media AOR. WPP created "Team Nationwide," an integrated agency team including Essence and Ogilvy to serve the account, bringing media, tech, and creative work under one umbrella. The agency will collaborate with WPP Ogilvy, its creative AOR since 2016. Essence will merge with MediaCom in 2023 to form EssenceMediacom.
- Maryland-based insurer **Geico** kicked off a review of its media account after working with independent Horizon for over 25 years. There is no impact on its longtime creative agency, The Martin Agency.

## Personal care

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- Personal care products firm **Edgewell** selected Havas Media Group (HMG) North America as its US media AOR, following a review and replacing incumbent Stagwell's Assembly. The agency will handle media planning, buying, and optimization.
- Optical retailer **Eyemart Express** selected NY-based and Merkle co-owned Media Storm as its new media AOR, following a six-month review and replacing five-year incumbent Kelly Scott Madison (KSM). The agency will handle media strategy, planning, and buying across channels as well as data science and insights.
- Sports nutrition supplement company **Universal Nutrition** selected Terri & Sandy as its first digital AOR. The agency will handle digital and social media for the brand, focusing on the client's Universal and Animal brands.
- Sustainable deodorant brand **Wild** selected BBH London as its new full-service creative AOR, without a formal review. The agency will support the newly launched company expanding its global footprint.
- The cosmetics giant **Estée Lauder** selected S4 Capital's agency Decoded (part of the Media.Monks content division) as its media AOR in North America. 80% of the brand's budget is spent in digital.
- The US Beauty Division of **Lumenis**, the world's largest energy-based medical device company for aesthetic and ophthalmic applications, selected Markacy, a New York-based digital strategy and marketing agency, as its AOR. The agency will handle digital and offline media.
- Personal care company **Dude Products** selected Cincinnati-based Curiosity as its creative and media AOR. The agency will focus primarily on the company's flagship Dude Wipes brand and handle advertising, influencer strategy, all media planning and buying, and activation efforts.



## Other

- **Glanbia Performance Nutrition** selected independent Horizon Media as its media AOR following a review, consolidating marketing across its portfolio, including SlimFast, Optimum Nutrition and Think! The agency will handle media execution and performance analytics and act as a consultant for GPN's in-house integrated marketing and media team.
- **Virgin Group's** reward club, Virgin Red, selected Dentsu's Carat as its AOR to handle global strategy, planning and investment across all media in the UK, US and various European markets, following a review, replacing incumbent Bountiful Cow.
- British telecom services company **Vodafone** retained Dentsu's Carat for its nondigital media services in 15 of the company's markets in Europe and Africa, following a review.
- 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.

## Manufacturing

- Hearing-aid manufacturer **Eargo** selected UM, the global media agency network of IPG Mediabrands, as its media AOR, following a review. The agency will handle media strategy, planning, buying, SEO, analytics, and consumer experience.
- Tire maker **Goodyear** selected Stagwell-owned Minneapolis-based agency Colle McVoy as its media and creative AOR for its company-owned properties. The Goodyear consumer brand's creative work continues to be handled by GSD&M.
- Garage door company **Chamberlain Group** selected Droga5 as its AOR following a review. The agency will partner with Accenture Song to help Chamberlain rebrand its business. The brand previously worked with Chicago agency Schafer Condon Carter.

## Pharma and health

- **CVS Health** selected Publicis Groupe as its new creative and CRM AOR in the US, following a review and replacing incumbent since 2014 BBDO. The brand is expected to leverage talent from multiple Publicis Groupe agencies, including Hawkeye, Le Truc, and Saatchi & Saatchi LA. The holding company will collaborate with media AOR, UM.
- **LEO Pharma** selected Bartle Bogle Hegarty (BBH) as its global AOR, following a review. The agency will handle work related to chronic hand eczema disease awareness.
- The Bayer-owned over-the-counter pain reliever brand **Aleve** selected Interpublic's MullenLowe New York as its creative AOR in the US after a review.
- Global health and hygiene firm **Essity** selected WPP Wunderman Thompson to handle its global e-commerce and UX design business after a review. The agency, which handles a direct-to-consumer website, customer experience, and a global UX and UI design system, will also handle a diversity and inclusion project for Essity's feminine care brands.
- Employee healthcare company **Eden Health** selected Hub San Francisco as its first AOR after a review.
- **ViiV Healthcare** selected Havas Health & You as its global AOR. The agency will handle all brands and portfolios.
- 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.

## Need to evaluate your agency partners?

Do you need to validate that you have the right agency partnerships in place? There is a better way.

Check out our new video explainer about [EvaluationDeliver](#).





## Retail

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- Pet-care firm **Hartz** selected San Francisco-based Cutwater as its creative and media AOR, following review, replacing incumbent Carmichael Lynch. The agency will handle creative, media buying and planning, brand, and social strategy.
- Amsterdam-based coffee marketer **JDE Peet's** (with brands like Jacobs, L'Or, Tassimo, and Senseo) consolidated its global creative account with WPP, which will operate from its Amsterdam campus. The agency will leverage talent from its network, including Design Bridge and Wunderman Thompson.
- Swiss retailer **Migros Fachmarkt AG** selected WPP as its strategic marketing and communications partner, following a review. WPP created a dedicated entity called Team Connect, which will bring together resources from its talent pool in Switzerland (Ogilvy, Scholz & Friends, Wunderman Thompson, Hogarth, and Choregraph).
- Retailer **Northern Tool + Equipment** selected Colle McVoy as its strategic and creative AOR after a review. The agency will handle strategy, creative, media, content, and brand experience.
- Beach shade maker **Shibumi Shade**, of Raleigh, North Carolina, selected Baldwin& as its brand AOR. The agency, which previously worked for the brand, will handle brand strategy and a brand refresh.'
- Condom maker **Trojan** selected Portland, Maine-based Via as its US creative AOR, replacing 72andSunny, the incumbent since 2018, and expanding its relationship with the parent company Church & Dwight and the Arm & Hammer brand.
- **De'Longhi Group** selected Germany-based Mediaplus North America as its North American media planning and buying AOR following a review, replacing incumbent Wavemaker. The agency, which now handles 30 markets, will be responsible for all media, including work for De'Longhi subsidiary Braun Household.
- **The Salvation Army** selected independent agency Barkley its lead agency for its Thrift Stores and Adult Rehabilitation Centers.
- 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.

## Technology

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- Microsoft-owned **LinkedIn's** LinkedIn Marketing Solutions (LMS) selected San Francisco-based digital agency Traction as a "marketing accelerator consultancy" for its in-house marketing teams with a focus on digital transformation, ad-tech/martech data strategy, media strategy, and the future of television.
- Match Group's dating app **Tinder** selected VaynerMedia as its global media AOR, following a review and replacing incumbent Crossmedia which previously handled the brand's US media. The agency will partner with creative AOR Mischief @ No Fixed Address.

- Dallas-based global influencer marketing platform **LTK** selected Deloitte Digital as its new AOR for creative, media planning, and strategy. The agency will combine creativity, strategy, data, and technology to serve the brand.
- Fintech company **GreenBox** selected Innocean USA as its first advertising and branding AOR after a review.
- Tech platform for indie labels and musical artists **Intercept Music** (owned by Sanwire) selected New York-based Workhouse as its integrated global AOR. The agency will handle PR and integrated services including creative, social media, brand promotion, consulting, and modern-day marketing.
- **Lenovo** selected Stagwell Agency Assembly and Dentsu as its new global media AOR after a review, replacing Publicis's bespoke Lenovo One Media team, which serviced the account for four years. The review was prompted by a global marketing transformation initiative to accelerate Lenovo's digital-first strategies, key centers of excellence, and marketing effectiveness.
- Ticketing platform **SeatGeek** selected WPP Wavemaker as its first media AOR after a review. The agency will handle all media activities, including strategy, holistic planning, buying, investment and activation, marketing intelligence, video, and out of home. WPP Wavemaker will partner with creative AOR Fig.
- **Digital Gaming Corporation** selected Deutsch NY as its US strategic creative AOR. The agency will handle creative strategy and in-market activations as the lead agency of record in the US.
- **Samsung** retained integrated marketing agency WPP's Wunderman Thompson UK as its CRM AOR (the five-year incumbent) to handle its European CRM account following a review.
- 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.
- 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.
- 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.
- **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.





## Travel and accommodations

- **Norwegian Cruise Line** selected Digitas as its global media AOR, consolidating work previously distributed to various agencies, replacing incumbent OMD for traditional buying in the US, dentsu's 360i for digital media in the US, and Neo Media World for Europe media. The agency will handle the brand's media business in the US, Europe, Australia, Asia Pacific, Latin America, and Brazil.
- **Virgin Voyages** selected two Omnicom agencies to lead its media-related marketing efforts across the UK and North America: Hearts & Science (UK) and OMG's Resolution (North America). The agencies will handle all media, including multiscreen touchpoint strategy with TV, performance, and digital, including pay-per-click, organic and paid social, and digital display.
- Carnival Corp.-owned cruise line giant **Holland America** selected Cincinnati-based Curiosity as its creative AOR following a review that involved 10 agencies. Curiosity will handle branding, creative and social media duties.
- Rideshare company **Lyft**, Inc. selected Interpublic media agency Mediahub LA as its US media AOR following a review, replacing incumbent VaynerMedia and a project-based relationship. Mediahub LA will handle media planning, buying, analytics and measurement, and partner with IPG data company Acxiom.
- Rideshare giant **Uber** selected New York-based Johannes Leonardo as its lead creative AOR on its main Uber business following a review. Mother is expected to continue work on its Postmates and Uber One brands.
- National airline of UAE **Etihad Airways** retained Crossmedia as its global media AOR following a review. The agency will handle all media planning/buying as well as digital transformation, including automating its marketing communications.
- Tripadvisor's **Viator** selected Fig as its creative AOR and Ocean Media as its media AOR following a review.
- **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.

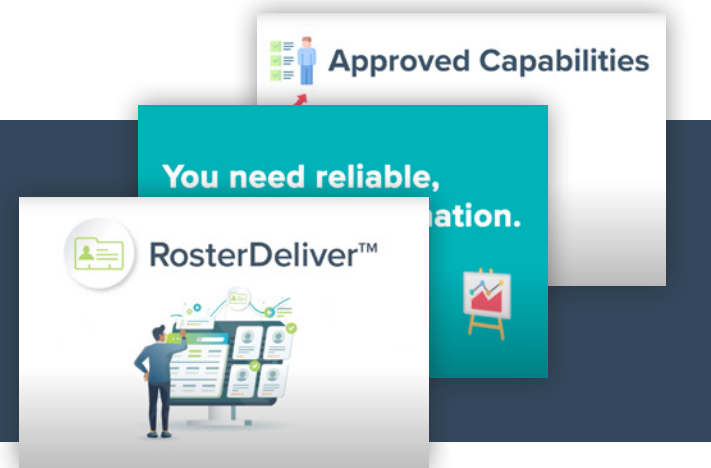
## Services

- Pest control company **Orkin** selected DDB Chicago as its strategic business and creative AOR, replacing incumbent The Richards Group.
- **FedEx** kicked off a review of its media business. Two decades-long incumbent Omnicom's OMD is expected to defend. There is no impact to the creative AOR relationship with Omnicom sibling BBDO.
- Online grocery delivery service **FreshDirect** selected Cincinnati-based agency Curiosity as its first creative AOR, following a review. The brand previously worked on a project basis with several agencies.
- Food delivery app **Grubhub** selected UM as its US media AOR in a bid to consolidate its media activities, following a review and replacing incumbents dentsu for out-of-home media and Havas for TV media. The agency will handle all media including television, digital, connected TV, and programmatic.
- Remote work platform **Velocity Global** selected IPG's McCann Worldgroup as its new global creative AOR. The agency will support all B2B brand and creative efforts to promote the Global Work Platform™.
- NFT company **Boss Beauties** selected independent Wieden+Kennedy as its creative AOR. The agency will handle brand positioning, design, social, content, and product.
- Technology-enabled real estate marketplace **Pacaso** selected Interpublic's Mediahub and Publicis Groupe's BBH as its new media and creative AORs, respectively.
- Amazon-owned podcasting platform **Audible** selected GroupM's Wavemaker as its paid media AOR globally following a review, consolidating work previously handled by multiple agencies, including Publicis' Spark Foundry, in the US.

## 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.

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- **Crunch Fitness** selected Familiar Creatures as its first creative AOR, replacing project relationships with StrawberryFrog, Code and Theory, and VaynerMedia subsidiary The Sasha Group. The brand worked with Familiar Creatures on a project basis prior.
- HR services provider **Randstad** selected Havas Creative as first global creative AOR following a review. Randstad will be handled by the Havas London office. Subsidiary Monster will be handled by Havas' Arnold Worldwide in Boston.
- Self Esteem Brands-owned **Anytime Fitness** selected Mischief @ No Fixed Address as its creative AOR following a review. This is the brand's first AOR appointment.
- **Planet Fitness** moved away from the bespoke unit within Publicis Groupe and the relationship as a single holding company model and went back to working with Barkley as its AOR less than a year after appointing Publicis.
- **Upwork** selected IPG Mediabrands' agency UM as its media AOR following a review. The agency will handle brand media strategy, planning, buying, and data and analytics. The agency will leverage Acxiom data as well as IPG Mediabrands' resources to build "a truly integrated team."
- Real estate company **Zillow** kicked off a review of its creative account. The incumbent, New York-based Fig, is expected to defend, two years after securing the account.
- **GoodLife Fitness** selected independent Gut Toronto as its creative AOR. The agency will handle advertising and brand strategy.
- **H&R Block** selected WPP's Ogilvy without a review, replacing incumbent IPG agency Carmichael Lynch (since 2021). The brand retained Stagwell's Gale to handle other parts of the business, including media planning and buying, data and analytics, and CRM.

NEW ARTICLE

# Are You Gambling With Your Agency Partners?

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**As seen on Forbes.com:** Check out one of our latest articles, "[Are You Gambling With Your Agency Partners?](#)" What we learned about betting on the right relationships and building best-in-class agency partnerships against the odds.

# Top agencies in the world by 2021 revenue

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AGENCY

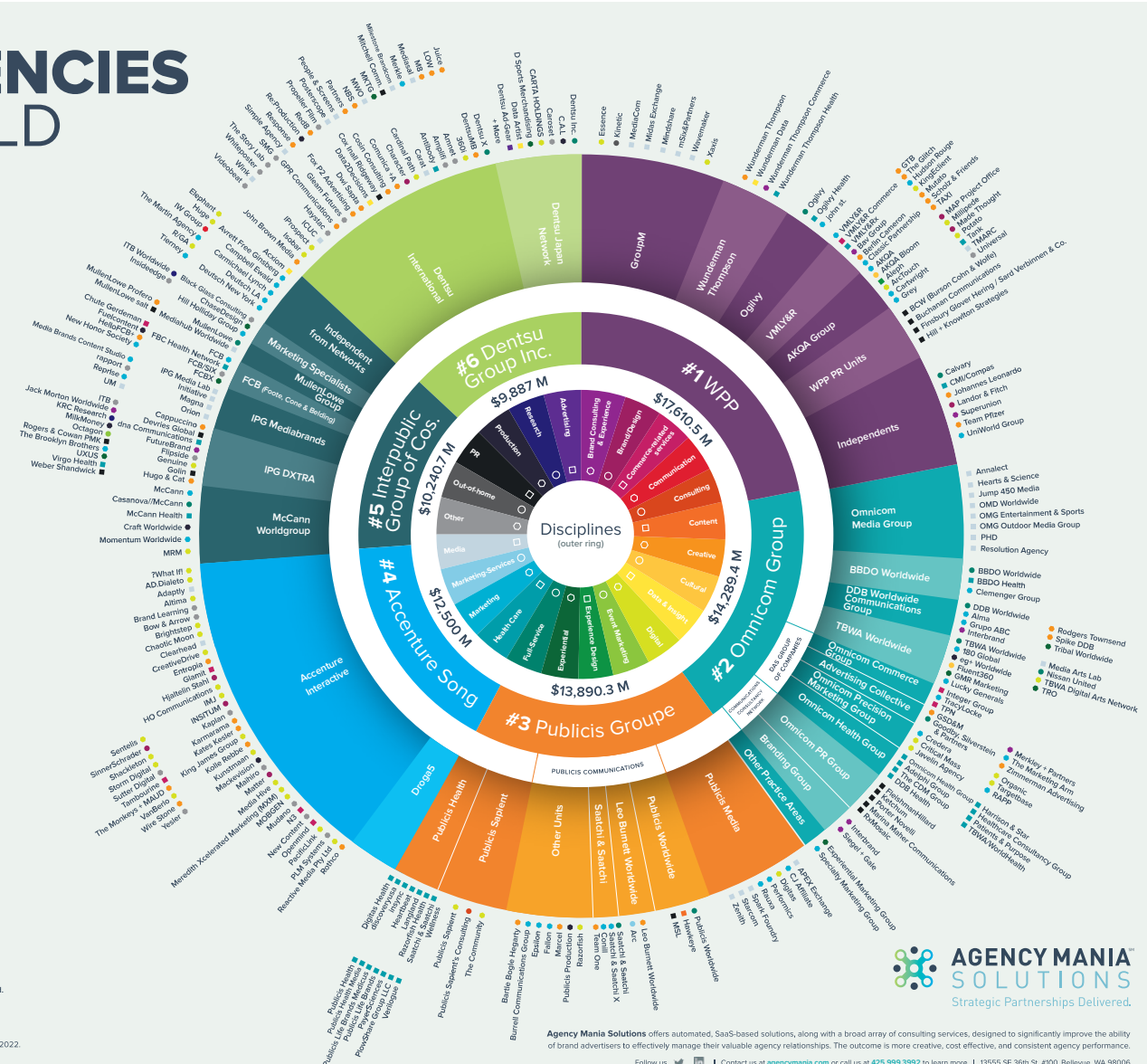
## 2022 TOP 15 AGENCIES IN THE WORLD BY 2021 REVENUE

Agency	2021 Revenue (USD Millions)	2021 % year-over-year	2020 % year-over-year	Global HQ	# Offices # Countries # Employees
1. WPP	\$17,610.5	+12.1%	-9.0%	London, UK	131 offices 111+ countries 107K+ EEs
2. Omnicom Group	\$14,289.4	+10.2%	-12%	NYC, USA	1,500+ offices 100+ countries 60K+ EEs
3. Publicis Groupe	\$13,890.3	+10%	-0.6%	Paris, FR	1,290+ offices 100+ countries 80K+ EEs
4. Accenture Song	\$12,500	+17.4%	+3.0%	NYC, USA	125+ offices 50+ countries 537K+ EEs
5. Interpublic Group of Cos.	\$10,240.7	+11.9%	-11%	NYC, USA	90+ offices 100+ countries 50K+ EEs
6. Dentsu Group Inc.	\$9,887	+13.1%	-8.0%	Tokyo, JPN	1,000+ cos. 145+ countries 60K+ EEs
7. PwC Digital Services	\$8,880	+15.3%	+13%	NYC, USA	153+ countries 276K+ EEs
8. Deloitte Digital	\$8,741	+9%	+2.0%	NYC, USA	30+ countries 7K+ EEs
9. Hakuho DY Holdings	\$7,525	+15.2%	-20%	Tokyo, JPN	21+ countries 17K+ EEs
10. IBM IX	\$6,385	+15.2%	-1.0%	Armonk, USA	5 continents 17K+ EEs
11. Cheil Worldwide	\$2,897.8	+24.2%	-21%	Seoul, SK	45+ countries 7K+ EEs
12. Vivendi's Havas	\$2,770	+13.6%	-8.0%	Puteaux, FR	100+ countries 20K+ EEs
13. Stagwell Inc.	\$2,224	+6.6%		NYC, USA	3 countries 10K+ EEs
14. Innocent Worldwide	\$1,306.8	+25.9%		Seoul, SK	17 countries 1K+ EEs
15. Advantage Marketing Partners	\$1,233.5	+21.4%		Irvine, USA	40 countries 10K+ EEs

**Notable changes from 2020-2021**

- U.S. agency revenue in 2021 grew at its fastest pace (13.5%) since 2000 (14.6%) as agencies showed resilience and relevance amid a marketing revolution.
- 2021's growth followed a 6.8% drop in 2020, which was the second-biggest decline since 2009.
- Accenture Interactive has rebranded as 'Accenture Song' as the consulting company moves to consolidate over 40 agencies under one name and P&L.
- Stagwell combined with MDC Partners in August of 2021, making it the 13th largest holding company in the world.
- Both Quad and BlueFocus Communication Group have dropped from the Top 15 rankings.

Agencies listed are of particular note with a global reach, and do not capture the entire roster. Current as of June 10, 2022.  
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Data is listed chronologically in most instances, and alphabetically in others.

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# Talent

Securing the right talent  
and resources





## TALENT: Securing the right talent and resources

### Year-end summary

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#### February 2022 | Volume 61

The “Great Resignation” movement has preoccupied many leaders in our industry as its impact is widespread across the industry and the entire advertising ecosystem. Client and agency HR departments will be busy in 2022. The “Talent Wars” are now center stage. This phenomenon is leading to higher agency wages, which in turn leads to higher costs for talent acquisition and retention, and those costs are passed on to advertisers. Employees are expecting greater remote work policies, higher flexibility and more hybrid environments, better benefits, increased autonomy, stronger corporate purpose, and a commitment to DEI and sustainability with tangible metrics to hold everyone accountable. Like I said, HR departments are likely to be VERY busy in 2022. These profound changes will shape new agency cultures and new practical means of collaboration with advertisers.

#### March 2022 | Volume 62

Talent has never been more center stage since COVID, and it’s expected to remain a topic of conversation for months and years to come as companies struggle to attract, retain, and motivate employees. Brands and agencies are figuring out if their teams will go back to some office space or continue working remotely. The pool of talent is growing as well. The Big 6 groups added 32,000 new jobs in 2021. They reinstated large bonuses as they achieved double-digit growth and recovered financially in 2021. The supply is weak, and demand is currently high, leading to salary inflation and cost-of-living adjustments. For most agencies, labor-related expenses range between 65% and 70% of revenue and remain the largest expense. As expected, when oil prices go up, airline companies raise their pricing. So naturally, when talent costs go up, agencies raise their prices.

#### April 2022 | Volume 63

The “Great Resignation,” aka the “great talent attrition,” is in full swing, and our industry is feeling the pinch. Some refer to the phenomenon as the “Talent Feeding Frenzy.” Retaining and attracting talent has never been harder. As demand increases and supply shortens, costs continue to rise. Agencies and brands are introducing new benefits to reduce voluntary attrition, which is estimated to be at least 30% to 40% in advertising, well exceeding other industries (with the exception of tourism perhaps). We can expect this topic to receive much attention as the industry figures out creative ways to solve this challenge.

#### June 2022 | Volume 64

The war for talent is raging. Self-reported data from US agencies in 2021, presented by Campaign US in its Agency Talent Snapshot, shows that the average churn rate was 31% across medium- to large-size agencies (e.g., Carat, UM, Starcom, Horizon Media, Digitas). One agency (iProspect) reported a churn rate as high as 40%, showing how difficult it has been for agencies to keep talent. Many agencies refused to disclose such data, reinforcing how sensitive the topic is, especially among clients concerned about losing core talent on their account and having to deal with the added complexities and costs that may result.

#### August 2022 | Volume 65

The topic of talent covers a wide range of important initiatives encompassing in-house agencies, responsible advertising (diversity and inclusion, environment), new agencies or capabilities, restructures, and reorganizations that are (re)shaping the advertising industry. The focus seems to be on securing and retaining talent, in the context of work-life balance.

#### October 2022 | Volume 66

Agencies are struggling to attract and retain talent. Agencies including TBWA have appointed new leadership roles—e.g., Chief Learning and Development Officer and Executive Director of Global Recruiting—to address the issue. Agencies are also dealing with employee expectations set during COVID about remote work. For the most part, agencies are reluctant to mandate a schedule of five days in the office as they fear losing talent now enjoying remote work and greater flexibility. Most designate one or two days to be in the office while others give employees full flexibility. Holding firms like Interpublic Group (IPG), as part of a commitment to transparency around diversity, equity and inclusion, are releasing data showing the percentage of executives according to race and gender, and how those numbers are improving year over year.

#### December 2022 | Volume 67

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.



## Key takeaways and predictions

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- The Association of National Advertisers (ANA) identified four major **focus areas** for marketers in 2022: advertising and media (with programmatic); gender equality and DEI; measurement, data and technology; and society and sustainability.
- Four key takeaways from **Campaign US Agency Report Cards 2022**:
  1. Business bounces back post-pandemic
  2. Clients are consolidating and shifting to project work
  3. The Great Resignation hits agencies hard
  4. Agencies are doing better on representation of women than BIPOC representation
- Per Stagwell, **main insights from Cannes Lions**:
  1. The New Rules of Global Marketing Service: The holding companies and global networks are back on the rise after a pre-pandemic slump as clients seek integrated partners over indie darlings
  2. E-Commerce is Getting New Digs: It's creative + media + e-commerce as the new equation for effective modern marketing
  3. The Creator Economy Growing Up: The shift in nomenclature from "influencer" to "creator"
  4. Gen Z on the Rise: The "activist generation," Gen Z, is all about more purposeful consumerism
  5. Transforming Modern Brands: Whether it's breaking into a new service category or innovating with product design, the focus is digital first, connected to culture, and organized around good
- 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 head-on; taking creative risks; the rise of retail media (e.g., Walmart Connect); and purposeful marketing with a growing focus on sustainability.
- 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?
  3. 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 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

## Talent

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- Per Steve Boehler (founder of Mercer Island Group), here are **5 questions CMOs should be asking their agencies**:
  1. What is the agency's strategy for competing for the best personnel?
  2. What specific training plans and programs are in place today for your staff?
  3. What is up with your rates?
  4. What is the agency's strategy for DE&I and how are you tracking your efforts?
  5. What should I know that I don't?
- Per Creativebrief, 92% of agency chief executives and 59% of brand CMOs think the **traditional pitch process** is not fit for purposes today. 97% of agencies and 59% of brands say the traditional pitch is not in line with modern-day expectations for responsible and ethical business practices. 67% of brands would still consider working with agencies that refuse to engage in the pitch process. 100% of agencies and 96% of brands say they would consider working with a brand or agency on a three-month, paid-for project in place of the pitch.
- Advertising legend Dan Wieden, co-founder of **Wieden+Kennedy**, who created the iconic Nike slogan "Just Do It," passed away at age 77 on September 30. He was also a devoted humanitarian.



- Per Erica Peacock, COO of Playbook Media, here is **why agencies should hire marketing freelancers**:

1. No fluff—freelancers are efficient
2. Low commitment
3. Minimal uplift for new channels
4. Great talent
5. Speed

- 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
3. 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 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.



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## Top 6 Media Agency Networks Final 2021 Global:

Omnicom's OMD repeated as **the top-ranked media agency globally** by billings in 2021, according to analysis by agency research firm COMvergence. The agency posted billings of \$23.8 billion, up nearly 12% compared to COVID-impacted 2020. OMD also retained the billings crown for the US region.

GroupM's Mindshare placed second with \$22.6 billion (+12.6%), while Dentsu's Carat and GroupM's MediaCom shared the third spot, each with total billings of \$17.2 billion. Publicis Media's Starcom rounded out the top 5 (\$15.2 billion, +21%), and GroupM's Wavemaker was sixth (\$14.8 billion, +13%).

RANK	MEDIA AGENCIES	OWNER GROUPS	TOTAL BILLINGS M\$	SHARE OF DIGITAL BILLINGS	INDUSTRY MARKET SHARES	INTRA NETWORK MKT SHARES	# OF CLIENTS	TOTAL BILLINGS M\$	GROWTH IN M\$ 2020-21	GROWTH IN % 2020-21
#1	OMD	OMG	23 843 M\$	44%	6,1%	12,1%	2123	21 349 M\$	2 494 M\$	11,7%
#2	Mindshare	GroupM	22 645 M\$	45%	5,8%	11,5%	1834	21 105 M\$	2 539 M\$	12,6%
#3	Carat	dentsu intl	17 229 M\$	43%	4,4%	8,7%	1400	15 413 M\$	1 816 M\$	11,8%
#4	Mediacom	GroupM	17 187 M\$	41%	4,4%	8,7%	1731	14 988 M\$	2 198 M\$	14,7%
#5	Starcom	Publicis Media	15 209 M\$	43%	3,9%	7,7%	895	12 535 M\$	2 673 M\$	21,3%
#6	Wavemaker	GroupM	14 816 M\$	43%	3,8%	7,5%	1841	13 080 M\$	1 735 M\$	13,3%

## Employment in the advertising industry

- Per Basis Technologies, 38% of US ad executives (both advertisers and agency executives) plan to **leave their current jobs** within the next two years. Primary reasons are increasing complexity and lack of training and support.
- Per Campaign US, the **Big 6 global agency groups** (WPP, IPG, Publicis Groupe, Omnicom Group, dentsu, and Havas) added 32,000 jobs in 2021. The healthy 8.5% increase in headcount apparently followed a sharp 6% decline in 2020.
- Per the Association of National Advertisers and Forbes, the **annual turnover rate** in the advertising industry is estimated to be 30%, the second-highest rate overall, after tourism, and twice the rate across all industries (per Cendex/XpertHR, turnover was 14.4% in 2021). Per McKinsey, 40% of employees stated they were at least somewhat likely to leave their current job within three to six months. 64% of employers expect voluntary turnover to remain elevated or to increase.
- **Agencies** are reimagining their workspace, more often opting for smaller offices or no offices at all. Some agencies are changing their office space into “experience centers,” set up as sort of clubhouses, and designed to look and operate in a more open, collaborative setting.
- Per the consulting firm Spencer Stuart, **CMOs' average tenure** is now 40 months, its lowest level in a decade and much lower than CEOs at 85 months. In 2017, the average tenure for CMOs was 44 months. External hires increased to 45% in 2021 from 37% in 2020.
- Per Ad Age Datacenter, **total U.S. employment in advertising, public relations, and related services** continues to increase despite fear of a recession, recovering all pandemic losses and reaching an all-time high. The unemployment rate dropped to 3.5%, the lowest since 1969.

- Per TBWA's **Future of Creative Work study**, 63% of employees want their employers to help them achieve a better work–life balance and 58% say it is important for their employers to support their mental health.
- 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.

## In-house agencies

- Security Services firm ADT's **in-house media team** is composed of four individuals who handle all mass media planning, negotiating, buying, processing, and measurement for channels including national, local and connected TV, audio, and OOH (approximately a \$50 to \$75 million media budget).
- **PepsiCo Beverages North America's** in-house 52-person Content Studio developed more than 1,400 unique content assets in the past year.' The studio complements the company's brand teams, of which there are more than 20, and their agency partners with the goal to elevate overall creative excellence.
- Appliance marketer **Whirlpool Corp.** launched an in-house ad agency, World of Whirlpool Studios (aka WoW Studios), to handle most of the company's creative advertising, storytelling and experience work by 2023 for Whirlpool, KitchenAid, Maytag, JennAir and other brands. Digitas might retain creative work. The Chicago-based in-house agency will collaborate with Publicis Groupe's Spark Foundry, which handles media duties.

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- Per the **World Federation of Advertisers** and **The Observatory International**, 80% have an in-house agency (vs. 57% in 2020) and 13% are considering establishing one. Cost savings (76%), improved speed (73%), and increased productivity (52%) are the primary reasons for establishing an in-house agency.
- Per Lytho's 2022 Q2 Creative Management Report, 38% expect the number of people on their **in-house agency** team to grow in the next 12 months, mostly in creative strategy (31%), followed by marcom strategy (19%), brand management (16%), digital design (15%), social media design (12%), and web design (8%). 64% say internal clients struggle to completely understand the value proposition of in-house agencies. Issues such as tight deadlines (48%), unclear project requests (40%), and unexpected changes (38%) impact work and create tension.



Most vendors want to have a relationship with the client and the agency. In our case, we're both."

Christopher Lawrence  
Director Mass Media, ADT



- **Insurer Liberty Mutual's in-house agency**, Copper Giants, expanded beyond its in-house duties with a project assignment for Boston-based brewery Harpoon Beer. Copper Giants has 30 staff including creatives, strategists, and producers and handles 80% of the consumer-facing creative for the business.
- **Walgreens Boots Alliance** formed an alliance with Oliver to open its in-house agency, which will work hand-in-hand with WPP and the brand's global marketing and communications AOR, The Pharm.
- 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.)

## New agencies, capabilities, and reorganizations

- In its latest move to separate itself from its founder, the agency **The Richards Group** has shortened its name to TRG.
- Interpublic's media agency **Mediahub** launched an office in the metaverse, a sort of global meeting place, which it describes as “a dedicated space for like-minded people interested in the emerging trends, work, and artists in this fast-growing space.” Each floor is dedicated to a different theme and has a gallery featuring work and artists. The office is also in Decentraland, the metaverse built on the Ethereum blockchain.
- Gary Vaynerchuk's holding company, VaynerX, launched a production studio called **Eva Nosidam Productions** to create ads that “don't feel like ads,” including mini documentaries and branded series for social media, music videos, podcasts, augmented and virtual reality productions, live installations, and “guerrilla marketing” strategies.
- **S4 Capital** combined digital analytics and software engineering firm 4 Mile Analytics (data analytics, software engineering, UX design, and project and product management) with its content division Media.Monks.
- **S4 Capital and Stanhope Capital** came together to launch a new venture capital company, S4S Ventures, to invest in early-stage startups in martech, adtech, data technology, creative technology, and digital media, with an emphasis on the US, Europe, and the Middle East.
- **UNIT9 Group** launched a specialized London-based division dedicated to the metaverse, called M.A.D. (Metaverse Advisory Dept), mostly composed of producers, creative, and technical talent operating in all UNIT9 locations (Canada, China, Europe, and the US).
- **Stagwell Inc.** merged two agencies, MMI and Media Kitchen, and their offices within its Stagwell Media Network, under the MMI brand. Services include media strategy, planning and buying, performance marketing, influencer, PR, and creative content. Clients include Amazon, Gillette, Loews Hotels, Olay, Pantene, and Waste Management.
- **Stagwell Inc.** introduced its Stagwell Marketing Cloud to support in-house teams powering real-time business intelligence (with real-time business intelligence tools like the Harris Brand Platform), empowering and managing secondary brand ambassadors (with its end-to-end influencer marketing application Koalified), supercharging communications with predictive AI (with its PRophet tool), and forging new media to connect with consumers (with its augmented reality creation tool ARound).
- Chicago-based brand/shopper agency **Blue Chip** launched a new company called Bloomaze to sell martech products that the agency developed like Incentivaze, a loyalty/reward solution which includes digital receipt verification.
- **Dentsu** merged its agency Gyro with Merkle DWA and is retiring both agencies' names, making them part of Merkle B2B, a division of dentsu's Merkle unit.

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- Publicis Groupe’s digital transformation firm **Publicis Sapient** partnered with Siam Commercial Bank to launch a fintech joint venture, a platform-as-a-service business called SCB Tech X, to serve clients throughout Southeast Asia.
- **Media.Monks** launched a new initiative called the Immersive Web Trainee Program, a six-month paid program offering newly qualified developers (with a decent understanding of semantic HTML and CSS) the opportunity to build skills working alongside highly skilled staff in the Amsterdam office with the opportunity to land a full-time position.
- Havas Group launched **Metaverse by Havas**, a new offering to help brands navigate the metaverse, where Havas Villages bring communities together in an enriched extension of their bricks-and-mortar Villages. The virtual Villages include a recruitment service and new employee experiences, such as the onboarding process, while bringing people together from across all disciplines and empowering them to work side by side.
- Boca Raton-based and multi-brand marketing services company **Worldata Group** rebranded its agency division, now called Outcome Media. The unit includes email marketing, demand gen, database, and direct-mail acquisition services.
- **Accenture Interactive’s Droga5** opened its office in São Paulo, Brazil, with Netflix as its inaugural client, combining forces with acquired digital shops—cloud-based customer experience and commerce solutions company Experity, digital agency AD Dialetto, and content marketing agency New Content.
- **WPP** launched The Metaverse Foundry, a global metaverse offering through Hogarth, its specialist creative content production company. Capabilities include a wide range of talent focused on end-to-end design and production for brand experiences in the metaverse including virtual art, virtual stages, design, animation and visual effects studio, development of VR/AR applications, technology, and R&D.
- **VCCP** launched a global gaming offering, called VCCP+, headquartered in New York, which is centered around the gaming “multiverse”, the ecosystem of social media platforms and online communities around games. The unit will leverage creators and UX designers in its European offices, as well as talent from its global content studio Girl&Bear.
- **WPP** opened nine campuses in 2021 for a total of 31. Ten more are scheduled to open in 2022 (including in Paris, Tokyo, Toronto, Manchester, and Guangzhou). The holding company’s goal is to have 65 campuses accommodating 85,000 people by 2025, reducing the overall need for space by 15% to 20%.
- After Ryan Reynolds’s successful venture into advertising with his company Maximum Effort (which merged with MNTN), it’s now the turn of actor and entrepreneur Kristen Bell. Bell has launched a creative studio and production company called **Dunshire Productions**. The firm and its writers, producers, and directors will help brands (and agencies) produce traditional spots as well as short-form digital content.
- The newly launched agency **Modern Fanatic** is helping “brands connect with fans.” Created by a team of marketing and entertainment veterans with pop culture backgrounds, Modern Fanatic’s clients include ElectricNow, Heavy Metal Entertainment, and Sony. The agency provides fan engagement services, traditional and nontraditional advertising, social, brand strategy, campaign development, retail marketing and licensing, and press.
- **Accenture** launched a new unit, the Accenture Metaverse Continuum business group, to help brands increase marketing efforts in the metaverse. Accenture already operates its own metaverse, the Nth Floor.
- A new agency, **MKHSTRY**, launched by former Progressive CMO Jeff Charney, is focused on helping brands adapt to “the new creator economy, blockchain, Web3 and metaverse worlds.” The agency intends to be a disruptive marketing industry collective.
- **Merkle**, Dentsu’s technology-enabled customer experience management company, launched a global Experience & Commerce practice, including digital experiences via e-commerce websites, digital content, and commerce engines. The team has key partnerships with platforms including Adobe, Salesforce, Mirakl, and SAP.
- **Cheil Worldwide** launched Cheil Connect+, working seamlessly across time zones and disciplines to bring together strategy, creativity, innovation, technology, data, retail, CRM, pricing, and performance marketing. Collaboration will be more “agile and focused” than traditional offerings, “intentionally eradicating legacy silos, structures, and baggage,” the company says.
- **Dentsu** dissolved the media operations of its 360i unit, folding them into its Dentsu X brand. 360i still exists as a creative agency within the network. All 360i’s US media services are run through Dentsu X, Carat, or iProspect.
- A new Miami-based agency dedicated to social change called **AKQA Bloom** recently launched, backed up by AKQA and led by award-winning creatives “Zampa & Zaro” (Jean Zamprognio and Fernando Pellizzaro).
- Holding company **Publicis Groupe** created the new leadership role of Global Chief Solutions Architect to help clients better harness and combine data and technology through agile yet sophisticated go-to-market solutions, reporting directly to CEO and Chairman Arthur Sadoun.
- Holding company **Omnicom Group** created the new leadership role of Chief Data Privacy Officer to drive the firm’s privacy-first approach while ensuring clients comply with the increasingly complex data privacy laws and regulations such as GDPR and HIPAA.
- Holding company **WPP** created the new leadership role of Global Chief Talent and Inclusion Officer, reporting to the Chief People Officer and tasked to oversee WPP’s diversity, equity and inclusion, talent management, talent development and talent acquisition.

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- **Accenture Interactive** (recently named the world's largest digital network by Ad Age for the seventh consecutive year) rebranded as Accenture Song and consolidated over 40 marketing, communication and consulting companies under one name and P&L.
- **GroupM**, WPP's media investment group, completed its transformation to accelerate innovation and further simplify its operations with the merger of Essence and MediaCom to create EssenceMediacom (fusing the digital and data-driven DNA of Essence with MediaCom's scaled multichannel audience planning and strategic media expertise), the formation of GroupM Nexus (the world's leading global media performance organization with Finecast, Xaxis and GroupM Services) and the integration of Neo Media World into Mindshare.
- **VaynerX** launched a new a company called Tingley Lane Trading, a corporate trade agency focused on trading corporate assets for advertising and paid media.
- **WPP's Wunderman Thompson** launched a unified commerce service in North America that operates within the agency's Gorilla Group, allowing clients to engage their customers throughout the shopping journey and combining strategy, consulting, e-commerce media, data insights and technology enablement.
- **S4 Capital** entered into an agreement with LA-based software and technology consulting firm TheoremOne, which will merge with Media Monks. Theorem builds custom software for clients such as American Express, AT&T, Intel, Starbucks and Caterpillar.
- Creative licensing company **Catch & Release** launched a full-service creative technology platform that will build campaigns only using content it finds online. The firm will find any piece of content from the internet, request rights, track clearance progress and secure license, all in one place. The firm will use Catch Extension, a proprietary curation tool that allows users to save visual images or videos from any source on the internet.
- A new Toronto-based creative shop called **Courage** launched with backing from No Fixed Address, joining the NFA group of agencies, which span creative, healthcare, performance marketing, digital and media.
- Omnicom's TBWA operation in New Zealand launched a fully remote unit that's been dubbed **From Nowhere with TBWA\NZ**. The unit is designed to provide New Zealand clients with the best possible talent from around the world.
- **WPP** launched "Everymile," expanding its offer with a new fully managed service to provide brands with an outsourced direct-to-consumer e-commerce solution and expand the group's omnichannel commerce capabilities in strategy, customer experience, technology, online trading and merchandising, supply chain and logistics.
- WPP launched "**Making Space**," a new initiative focused on giving people space in which to look after their well-being and inspire creativity. The global, companywide break in July gave everyone across WPP the space to recharge and refresh.
- **Publicis Group** appointed its first Web3 native chief metaverse officer, a computer-generated avatar named Leon. Responsibilities include accompanying clients and advising on how to navigate and approach the meta jungle, acting as a guide to employees with the support of the right expertise and teams at Publicis, and showcasing the best examples of Web3 from clients and from across Publicis.
- **Dentsu** announced the consolidation of its creative shops into one entity called Dentsu Creative. Brands including dentsuMB (formerly mcgarrybowen), 360i, and Isobar are being shelved, and others will form the new Dentsu Creative global master brand, which will house 9,000 creatives worldwide.
- **IPG's McCann** launched a dedicated design practice called McCann Design combining resources from its offices in New York, London, and Toronto to address growing client needs (product design, service design, and UX design).
- Los Angeles-based media consultancy **Exverus Media** launched an agency dedicated to the retail media discipline called Retail Media Partners, based in LA and with offices in Detroit and New York.
- Santa Monica-based agency **Palisades Media Group** closed its doors after 26 years. Per the *Los Angeles Times*, the agency owed millions of dollars to various media companies.
- **Stagwell** reorganized its media network, adding several creative agencies (Crispin Porter + Bogusky, Forsman & Bodenfors, Observatory, Bruce Mau, Vito brands), previously organized under the holding company's Integrated Agencies Network operating unit, to its main operation to offer clients more integrated advertising services that include both creative and media.
- Havas' health and wellness and multicultural units have joined to form a new health equity unit, **Republica Havas Health**, aimed at servicing brands targeting multicultural patients and consumers. The new unit, which is part of the Havas full-service multicultural agency Republica Havas, will tap the resources of health and wellness sister unit Havas Health & You.
- **Agency Luckie** purchased a plot of land in virtual world platform Decentraland for their first virtual office. Developed by Luckie's brand experience and creative teams, the new virtual office is used for presentations and gatherings of employees and business partners to "experiment in the Web3 world."
- The Minneapolis-based agency **Periscope** launched a new offering, Favorite Child, to further the power of design. The practice offers design strategy, brand identity, packaging, and retail design services.
- **Omnicom Media Group** rolled out Google tech consultancy TRKKN across major new markets, including Australia, Denmark, New Zealand, Netherlands, Portugal, Singapore, Turkey, UK, UAE and the US. Later in the year, expansion is planned to Asia, the Middle East, and Latin America is planned.





- **Publicis Groupe** launched CitrusAd, powered by Epsilon, the so-called industry's first unified on-site and off-site retail media platform, now integrated with Epsilon to optimize for on-site and off-site consumer data. The group acquired CitrusAd a few months prior.
- Irvine, California-based **Advantage Solutions** combined several entities to create a new commerce marketing agency called Advantage Unified Commerce. The entity combines the expertise of Amazon specialists Beekeeper Marketing and eShoppportunity and various e-commerce solution providers.
- **Horizon Media** launched a new business-to-business media services practice, called Green Thread, focusing on revenue growth and data-driven strategies.
- The **Omnicom Advertising Collective** launched a dedicated gaming offering called LevelUp OAC, led by The Marketing Arm and GSD&M and providing creative and media services; in-game media planning and buying; experiential marketing; and influencer strategy.
- Independent marketing agency **Mower** of Syracuse, New York, became 100% employee owned via an employee stock ownership plan. The move is intended to foster "collaboration, creativity and problem solving." Clients include National Grid, FirstEnergy, FedEx, Northwest Bank and Ford Dealers.
- **Stagwell's Anomaly** launched its own media studio to facilitate media planning and buying for the first time, mostly serving clients who aren't working with a media agency and need external support.
- Several creative companies and agencies in the US, Canada, UK, Europe and Australia (Buck, VTProDesign, Giant Ant, HudsonBec Group, Anyways Creative, Creative Lives in Progress, If You Could Jobs, and It's Nice That) merged to form one marketing firm called **Residence**. Clients include Google, Apple, Nike, Meta, IBM, Adobe, Sonos, Airbnb, Warner Brothers, Netflix, Ray-Ban and Heineken.
- Dentsu Creative launched **Dentsu VI**, a virtual identity service that provides brands with a virtual face and personality to use across digital platforms. The service is powered by CGI specialists from Dentsu Creative Singapore.
- New York-based ad agency XenoPsi and London ad services consultancy Astroten jointly launched a new R&D unit called **Consumer Behavior Lab**, aimed at exploring how behavioral science can be applied to improve the effectiveness of marketing and the channels where those messages are placed to influence consumer behavior.
- **Wunderman Thompson** launched Prism, WT's in-house sports and entertainment marketing agency, to provide clients extra leverage and an alliance with some of the world's biggest music providers, such as Live Nation, AEG, Boiler Room, Warehouse Project and Broadwick Live. Clients include Kitkat and The Coca-Cola Company.
- A new San Diego-based creative shop called **Big Day (bigdaytheagency.com)** launched to help brands defy what it calls ordinary, combining big-idea thinking of traditional agencies with tactical skills of digital firms.
- **Stagwell** expanded and rebranded its Stagwell Media Network, renamed the Brand Performance Network, combining media, creative and commerce capabilities under the same umbrella. The Brand Performance Network operates in 60 locations in 20 countries with 6,000 employees, handling \$5 billion in media and commerce expenditures.
- **Stagwell** launched a new business arm and consultancy, dubbed the **Risk and Reputation Unit**, to help brands navigate political and social discourse, bringing together financial experts and political strategists from both sides of the aisle to help brands nail their messaging on controversial topics.
- Omnicom Group launched a new practice called **Transact**, focused on connected-commerce consulting and e-retail execution services. The new unit will handle partnerships with Amazon, Instacart, Kroger and Walmart Connect.
- Recording artist and entrepreneur Pharrell Williams partnered with marketing agency Edelman to launch advocacy agency **Mighty Dream** to produce creative work that addresses major societal challenges facing communities of color.
- **Omnicom Media Group's OMD Worldwide** launched Growth Academy, a free virtual marketing and educational program (six classes) aimed at helping small and mid-sized minority-owned businesses get the same level of media expertise as large brands. Partnering on the program are the National Minority Supplier Development Council and the New York Urban League.
- Using insight from neuroscientific research, predictive analytics platform **Dragonfly AI (dragonflyai.co)** launched to assist brands in predicting what consumers see first across any channel. The solution can be used in research and planning; e-commerce; branding; creative; CRO; advertising and promotion; and retail and shopper marketing.
- 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.
- **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%.

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- **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 creative-focused 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.

New article!

# Is Your Preferred Partner Program Painful or Prosperous?

**P3 Preferred Partner Program**

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## Partnerships and collaboration

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- Per R3, **global account reviews** increased by 53% in 2021, with WPP and R/GA leading global and US new business wins.
- Per Adweek, **what CMOs look for in their agency partnerships:**
  1. Finding the right match
  2. Crafting a healthy relationship
  3. Making long-term plans
- Per ID Comms, four key **tips for making the best agencies compete for your pitch:**
  1. Engage with the agency leadership as early as possible
  2. Invest as much effort as you can in creating the very best pitch brief
  3. Use a pitch consultant
  4. Get the C-Suite involved
- Per **Holland America**, the reason the agency Curiosity won creative AOR status during a recent review was that during the pitching process the agency sent two strategists on a seven-day California coast cruise to truly understand the brand and the cruise line experience.
- **WPP** entered into a new partnership with major digital entertainment developer Epic Games designed to provide creative and tech training such as real-time 3D creation and virtual production to employees tasked to create consumer experiences for brands in the metaverse, including in Fortnite.
- The Institute of Practitioners in Advertising and the Incorporated Society of British Advertisers joined forces to create the **Pitch Positive Pledge** with the aim of improving the often-brutal process of new business pitches by making it more intentional, accountable and responsible. 70 brands and agencies promised to stop bad pitching behavior. An industry survey will be issued to benchmark current pitching activity.
- Per the Association of National Advertisers, 57% of **marketing procurement** professionals and 59% of marketers identify their relationship as “extremely or very healthy.” In contrast, only 15% of agencies say their relationship with marketing procurement is “extremely or very healthy.” 55% of procurement professionals agree that procurement understands the economic value of successful marketing, versus only 5% of agencies. On average, the marketing procurement department has been around for only 11.6 years.
- Per the **World Federation of Advertisers** and **The Observatory International**, 69% of advertisers have recently made or plan to make changes to their agency roster, a reduction from the prior study (75% in 2018). 75% are at least somewhat satisfied with their current agency roster arrangements.
- 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.

## Research and organizing for success

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- Per R3, **global reviews** increased by 53% in 2021 with WPP and R/GA leading top global and US new business rankings.
- The Association of American Advertising Agencies (4A’s) announced that they are working with the ANA on an **Agency Search Simplification Initiative for 2022**, after publishing the 4A’s Agency Review Participation Agreement.
- Per the **Australian-based 2021 OUCH! Factor Report**, the average agency spent 175 hours on each pitch, and a cumulative 1,913 hours a year pitching—investing the equivalent of \$100,000 in unbilled hours before winning a single pitch. Marketers and procurement invested 125 hours on the average pitch process. The reported average win rate across all agency disciplines is 48%.
- Per the ID Comms 2022 Global Media Talent Report, only 4% of brand and agency leaders strongly agree that advertisers’ **current internal and external media talent** meets their needs. 75% of agencies and 68% of advertisers rate talent churn as a top concern, and 76% think finding the right staff members will become increasingly challenging in the next year.
- Per COMvergence, there were **155 US creative new business assignments** in 2021, a sharp increase from 92 in 2020. Sixteen agencies captured 70% of the combined media spend represented by US advertisers/brands that reviewed their creative accounts in 2021. Three agencies represented 25% of total spend, with independent agency Wieden+Kennedy winning six accounts representing combined media spending of \$420 million, followed by Omnicom’s TBWA\Chiat\Day, which won seven accounts representing \$340 million.
- **Challenger Stagwell** showed up strong as the network was recently tied as the second-most-awarded global marketing network in the Ad Age 2022 A-List Awards, beating out much-larger legacy giants.
- Per Scott Brinker (Chiefmartec), the 2022 **marketing technology landscape** now accounts for 9,932 solutions—up 24% from 2020. 972 vendors were removed for 2022 (acquisition or bankruptcy), but 2,904 were added.
- Consulting firm **R3** issued its Integration 2030 report on the future of integrated marketing. Per R3, the four roles shaping integration are:
  1. The role of the marketer as a conductor
  2. The roles of global and local
  3. The role of in-house agencies
  4. The role of data in innovation
- **Frontify** jointly released new research with Ad Age, “The agency-brand disconnect: finding a way forward,” revealing what agencies need to do to bring value to brand advertisers.



- Per TrinityP3, six reasons why you may have many **more agencies and suppliers than you need**:
  1. No supplier roster strategy or management process
  2. Siloed and decentralized marketing function
  3. Multiple and diverse market presence
  4. Poor or absent vendor management process
  5. Disparate house or brand structure
  6. Post-merger or acquisition fallout
- Per World Federation of Advertisers and MediaSense, a **talent crisis** is intensifying as 77% of brands claim that there is “some” or “high” scarcity of talent in their organizations, peaking at 85% among the agency and ad tech sectors, and at 81% in the US and 93% in Asia-Pacific. 77% think that readdressing work–life balance would help alleviate the crisis. Top talent gaps are data and analytics, e-commerce, and retail media.
- Per **Forrester**, 38% of B2C CMOs plan to structure their agency relationships to increase marketing effectiveness, and one-third plan to integrate agency assignments to boost marketing impact.
- Per **COMvergence**, the Top 30 Global Advertisers 2021 represented 44% of the total media spend placed by more than 785 multinational advertisers. Two-thirds of the Top 30 Global Advertisers reviewed their media agency arrangements over the past two years.
- Per the Association of National Advertisers’ (ANA’s) “**Procurement 2022: The Good, the Bad, and the Ugly**” report, the greatest gaps between the perceptions of procurement and marketing are in agency/supplier diversity; relationship management; continuous improvement savings and avoidance; and marketing process improvements. Key recommendations are:
  1. Goals must be aligned and shared
  2. Procurement should be involved early
  3. Procurement should focus more on value and less on cost
  4. Procurement should stay involved throughout the process
  5. Procurement should work closer with marketing teams
  6. Process improvements are an opportunity
  7. Education is critical
  8. Procurement should market its value
  9. Agencies should proactively establish relationships with procurement
- Per the **4A’s/ANA Agency Search Simplification Initiative**, 66% of agencies said it’s “painful” to not have direct access to the key decision-makers during a review or pitch. 98% of agencies said it’s valuable to know the size of the account, yet only 23% of marketers said it’s relatively painless to provide the budget, and 60% said providing the budget is valuable to the process. 71% of brands don’t think providing a list of participating agencies provides value. 66% of agencies find value in being able to claim their win, with 44% calling it painful to not be able to announce wins. Just 20% of brands find it valuable to let their agencies do this. 92% of agencies and brands find it valuable for procurement and the client marketing teams to agree in advance on criteria for picking an agency.

## Responsible advertising

- The latest ANA/AIMM list of “**Certified Diverse Suppliers for Marketing/Advertising**” was released and now features 377 companies (agencies, media, production, promotion, etc.), doubling in size in 2021.
- To complement ANA’s Certified Supplier List, AIMM created the **Non-Minority Certified and Non-Minority Owned with a Multicultural and Inclusive Specialty** list. As of December 2021, 110 companies have been listed.
- The **World Federation of Advertisers (WFA)** released a guide for “DEI-conscious media planning and buying,” encouraging more oversight and thoughtful consideration as to whether hate speech and misinformation gets funded.
- ANA, Sustainable Brands, and Adweek launched a coalition of resources and professional expertise—the **Global CMO Sustainability Accelerator**—an effort to consolidate and catalyze the global marketing community in driving growth through sustainable innovation. Key elements include: a curated hub, assessment tools and roadmaps, sustainability standards for marketing, and roundtables.
- 450+ Scientists (mostly **Clean Creatives** and the nonprofit Union of Concerned Scientists) signed an open letter calling on advertising and PR agencies to stop working with fossil fuel companies as clients and urging for an end to campaigns that ‘obfuscate or downplay our data and the risk of the climate emergency.’
- **Edelman** announced that it would “part ways with clients” that don’t adhere to its new environmental, social, and governance guidelines, following an internal review, formed after Clean Creatives petitioned the firm to drop its oil and gas clients (e.g., Exxon Mobil and Shell).
- **WPP** 2021 recap of major initiatives: WPP launched Unite, WPP’s first company-wide LGBTQ+ community, live in UK, North America, India, and Hong Kong; WPP was named among Best Places to Work for LGBTQ+ Equality. Gender diversity amongst leaders: 39% female senior leadership. They broadened their talent search by working with talent networks such as the LAGRANT Foundation and Brixton Finishing School and made a \$30 million commitment for increasing racial equity.
- Per the ANA (Association of National Advertisers), 23% of its membership does **business in Russia**. And of those companies, 25% have suspended or reduced their media spend in that country. One-third plan to either cease or scale back their operations in Russia.
- **Cannes Lions** banned Russian delegates and entries from 2022 awards, preventing agencies and brands from Russia from winning any recognition. Cannes Lions also established a digital talent directory for Ukrainian creatives affected by war.
- AdGreen launched its **Carbon Calculator** (<https://weareadgreen.org/carbon-calculator>) to estimate carbon footprint of motion, stills, and audio projects within ad campaigns so that agencies and brands can assess the environmental impact of their production activities. Production activities are logged to track improvements in carbon footprint.





- The **American Association of Advertising Agencies** launched its 4A's Talent, Equity, and Learning practice, which includes the work of the 4A's Foundation and a rebranded 4A's Learning Institute, to boost its D&I efforts.
- The ANA (Association of National Advertisers) held a series of **Virtual Supplier Diversity Fairs** focused on a particular type of ethnic/gender ownership (e.g., Asian-owned companies, etc.) to help brands match with the right partners.
- **Publicis Groupe** reported that it is closing in on its objective of having 45% of key leadership positions held by women by 2024, with 41% reached in 2021. Certified by the Science Based Targets initiative (SBTi), the group is committed to becoming carbon neutral by 2030, shifting to 100% renewable energy by direct source by 2030 and reducing its carbon emissions by 50%.
- **WPP** reported 109,000 employees in 112 countries, with women in 39% of executive leadership roles (women comprise 43% at the board level), and more than 30,000 technology accreditations and certifications earned via partners. On Earth Day (April 22) WPP announced its goal to achieve zero net carbon emissions in its operations by 2025 and throughout its supply chain by 2030. In their 2021 sustainability report, WPP said it sourced 74% of electricity from renewable sources.
- **Group Black**, a collective and accelerator for Black-owned media, started with an initial spend of \$75 million from GroupM and has now received a massive media investment from Procter & Gamble. The 30-person collective aims to deploy \$500 million in Black-owned media in 2022.
- **Ogilvy UK** decided that it would no longer work with influencers who distort or retouch their bodies or faces for brand campaigns. The company says it wants to combat social media's "systemic" mental health harms.
- In an effort to reduce the amount of false and misleading claims about the climate on its site, tech platform **Pinterest** rolled out a comprehensive **climate misinformation policy**.
- **IPG** global brand experience agency **Jack Morton** has launched a diversity-focused practice called Vivi to help brands connect with women, specifically women of color.
- Per **Campaign US** and based on US media and creative agencies' self-reported data about diversity, gender and churn: In 2021, women accounted for 51% of leadership positions and Black, Indigenous and people of color (BIPOC) accounted for 23%. Women on staffs accounted for 57% and BIPOC for 32%. Churn rates averaged 31% for that period.
- Holding firms **Publicis**, **Dentsu**, **WPP** and **IPG** stated they are covering travel for US staff seeking abortion access in the US in light of the upcoming US Supreme Court decision that could overturn Roe v. Wade.
- The 4A's, the Association of National Advertisers and the Alliance for Inclusive and Multicultural Marketing released their "Guidelines for Buyers (Agencies and Marketers) When Doing Business with **Diverse Media Suppliers**." The purpose is to help buyers (agencies and marketers) and diverse media suppliers improve their ways of working together.
- **AMV BBDO** launched a disability inclusion service called AMVxOpen—a new partnership allowing brands to find accessibility—and disability-inclusive experience gaps to develop solutions.
- **Target** launched the Roundel Media Fund, a fund managed through Target's in-house media network, Roundel, which will grant more than \$25 million in paid media to diverse-owned/founded firms (BIPOC) by 2025. The retailer has pledged to invest more than \$2 billion in Black-owned businesses by 2025.
- **Coca-Cola** committed to doubling its spend with minority-owned businesses by 2024, spending at least 8% of its ad dollars with Black, Hispanic and Asian-owned entities.
- Agencies are investing in **mental health resources** for employees, including in-house therapy, personalized health resources and platform tools. For example, Doner partnered with platform Boon Health to provide a personalized coaching platform to employees centered on personal growth, professional development and overall mental well-being. Grit Digital Health and Cactus created a wellness platform for topics such as leadership, work-life balance, family, finances and body image.
- **Ogilvy UK** announced it will no longer work with influencers who distort or retouch their bodies or faces (contrast or brightness are okay, though) for brand campaigns in a bid to combat social media's "systemic" mental health harms. The UK government is considering a Digitally Altered Body Image Bill that would require an influencer to disclose edited content.
- As part of its Responsible Marketing Action Plan, telecommunications giant **Verizon** reported spending 65% of its video budget with diverse-owned video production companies, and said 49% of its video productions used diverse directors. Verizon spent 46% of its experiential budget with diverse-owned experiential production companies and 45% of its print budget with diverse-owned print production companies.
- **Havas Media Group** becomes the first global media network to offer Ethical Certification. The program, the Certified Ethical Advertising Executive, was developed by the Institute of Advertising Ethics.
- **Unilever** increased the age limit for its ban on food and beverage marketing that targets children (from 12 to 16) and will not use influencers younger than 16 in marketing.
- Our amazing employees at **Agency Mania Solutions** are supporting families in need in Ukraine through donations, which AMS leadership has matched. AMS is supporting #Ukraine via World Central Kitchen, which so far has delivered 16 million meals and 8 million pounds of food.
- A new initiative called **Advantage Ukraine** has launched, involving WPP shops in Ukraine, Poland, and the Czech Republic, encouraging brands to invest in Ukraine.



- The Association of National Advertisers, the American Association of Advertising Agencies, and the Alliance for Inclusive and Multicultural Marketing developed as a follow-up to the “buyers” guidelines a companion set of **guidelines for suppliers working with advertisers and agencies** in order to help the diverse media supply chain standardize its processes. Examples: Register Your Business on Marketer Supplier Portals, Consider Certification, Push Back on Extended Payment Terms, Be Clear on Evaluation Criteria.
- **GroupM** unveiled an initiative to provide the basis for standardizing an industry-wide calculator focusing on creating ads and buying media to reduce the ad industry’s carbon footprint, as well as steps to operationalize it—initially internally at GroupM and with its clients, but also through various players.
- The **Global Alliance for Responsible Media**, a group organized by the World Federation of Advertisers, introduced new guidelines on misinformation, new standards on ad placements, and an outline of first steps to make the metaverse safe for advertising. The new misinformation guidelines are in addition to the existing GARM Brand Safety Floor and Suitability Framework.
- **Omnicom Group** released its diversity, equity and inclusion (DE&I) report stating that 40% of all new hires in the US were Black, Indigenous, LatinX, or Asian American. At the end of 2021, 20% of Omnicom’s executive or senior level managers in the US were Black, Indigenous, LatinX, or Asian American, a 25% increase since 2018.
- **Publicis Groupe** released its DE&I report showing a 17.5% YOY increase in the percentage of people of color across its US workforce. Overall, people of color now constitute 34% of the Publicis Groupe US workforce. The increase is strongest in entry-level positions, at 42%, up 22% from last year; mid-level positions are up 15%, and senior leadership positions, 19%.
- Holding firm **IPG** released its 2021 US EEO1 (Equal Employment Opportunity) data. Key highlights: Year over year, the representation of women is up 3.2% among senior/executive-level managers, 1.1% among first/mid-level managers and 1.8% among professional-level employees. Black or African American representation increased 11.6% among senior/executive-level managers, 14.3% among first/mid-level managers and 22.2% among professional-level employees. Asian representation increased 8.7% among senior/executive-level managers, 6.9% among first/mid-level managers and 7.8% among professional-level employees. Hispanic or Latino representation increased 4.7% among senior/executive-level managers, 7.1% among first/mid-level managers and 12.3% among professional-level employees. White representation decreased 2.4% among senior/executive-level managers, dropped 2.8% among first/mid-level managers and declined 5.6% among professional-level employees.
- **NBCUniversal** launched a new advertising program, called Open Doors, to support diverse-owned small businesses. Open Doors uses NBCUniversal’s One Platform cross-portfolio ad buying suite to offer marketing resources to small businesses still recovering from the pandemic.

- ANA launched its **SeeHer initiative**, which works to advance the representation of women in entertainment, marketing and media and the SeeHer in Sports scorecard in partnership with AT&T. The scorecard features questions to help media organizations analyze content dedicated to women’s sports and how women are represented within their businesses and as broadcasters and on-air talent.
- **Interpublic Group** and its agencies, in partnership with consultant Planet + Purpose Solutions, are now reviewing climate impacts of prospective clients that operate in the oil, energy and utility sectors before accepting new work. For example, are these companies publishing clear climate reporting, including scope, baseline, timeline, and the tracking of Scopes 1, 2 and 3 emissions? Are their goals in line with the goals IPG has made in its own ecosystem, and reported on publicly? Have these companies ceased any controversial forms of oil and gas production?



Sustainability has justifiably become a cornerstone of 21st century marketing.”

Bob Liodice  
CEO, Association of National Advertisers



- Global healthcare brand Sanofi and media services provider Omnicom Media Group started testing the tracking of carbon emissions developed by **IAS and Good-Loop**, enabling advertisers to measure carbon emissions generated by their digital ad campaigns.
- Per Good-Loop, 61% of marketers are now tracking **carbon emissions generated by their digital advertising campaigns**. 87% believe the digital ad industry has a responsibility to reduce carbon emissions; 12% believe they will reach net zero targets for their digital ad campaigns by 2023; and 16% believe they will do so by the end of 2024.
- Stagwell’s **Forsman & Bodenfors** became the first creative agency to be certified by the Seattle-based Fair Pay Workplace for gender pay equity.
- The **Potential Energy Coalition**, a nonprofit research and creative shop with more than 100 advertising, analytic and media agencies within its network, partnered with environmental advocacy organization Climate Power to produce ads such as “The Great American Build” created pro bono by Pereira O’Dell.



- 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 Black-owned 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 added-sugar 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:
  1. Ryanair
  2. Oatly
  3. Alpro
  4. Innocent Drinks
  5. Quorn
  6. Pepsi Lipto
  7. Hyundai
  8. Shell UK
- Per Purpose Disruptors and Magic Numbers, **CO<sub>2</sub> emissions caused as a result of advertising-driven consumption** in the UK have increased by 11% between 2019 and 2022. Advertisements are defined as the uplift in greenhouse gas emissions that result from the increase in sales generated by advertising.

## Training and new ways of working

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- An Association of National Advertisers (ANA) study found that +90% of marketers find training resources for successful **agency management** inadequate. Nearly 60% of marketing executives say up to 30% of their total budget is lost to these inefficiencies. And 80% of them experience "high levels of stress" when agencies fail to deliver on expectations.
- The **Association of National Advertisers (ANA)** launched a new training program under its Marketing Training & Development Center designed "to help both clients and agencies improve their working relationships to drive growth, reduce costs, and relieve unnecessary friction and stress."
- The **Association of American Advertising Agencies (4A's)** announced the creation of a multifaceted professional development training curriculum entitled "A Comprehensive Guide to Agency Economics," geared to both financial and non-financial personnel.
- **Wavemaker** created a Global Head of Applied Innovation role, a position responsible for working with the network and its global clients to "simplify the complex world of innovation" via tech solutions.
- ANA released **The CMO's Guide to Programmatic Transparency** to educate brands on how to discover, analyze, track, understand and possibly reduce what they pay for programmatic media buying as cost scrutiny continues in this area.



- The ANA's School of Marketing launched an updated version of its on-demand **Agency Management training** from instructor Bruno Galpois. The 90-minute workshop is extremely valuable for managers 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, briefings and more. For more information: [ana.net/ondemand/show/id/OD-AGM07](http://ana.net/ondemand/show/id/OD-AGM07).
- Michael Farmer released his new book, **Madison Avenue Makeover: The Transformation of Hugu and the Redefinition of the Ad Agency Business**. The author was invited by Mat Baxter, the new CEO of Hugu, to become a "fly on the wall" and observe the transformation of Hugu. 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.

## 2022 Agency profiles

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- **3Q Digital (3qdigital.com)** is an independent Chicago-based digital agency founded in 2008 with a focus on B2C, B2B, e-commerce, and fintech. End-to-end services include creative, business strategy and planning, paid search, paid social, conversion rate optimization, programmatic, CTV-OTT, mobile user acquisition, analytics, e-commerce and marketplaces, social advertising, display, mobile, and CRO. The agency, which has more than 500 employees, has been named to Ad Age's Best Places to Work for three consecutive years, was among the highest-scoring businesses on Inc.com's Best Workplaces for 2021, and was named a 2022 Google Premier Partner. The agency acquired Inseev Interactive this year and manages over \$3 billion in spend. Clients include Pandora, Skechers, Intuit TurboTax, BevMo, and eHealth.
- **David Madrid (davidtheagency.com)** is a creative company based in Madrid and in the legacy of David Ogilvy, with offices in Bogota, Buenos Aires, São Paulo, Miami, and New York. Clients include Burger King, Budweiser, HSBC, Danone, Coca-Cola, Twitter, and Virgin Mobile. Founded in 2019, the agency was Ad Age 2022 International Agency of the Year. The agency deliberately hires diverse and international talent speaking multiple languages and puts the focus on creativity (61% of its staff are creatives).
- **Day One Agency (D1A.com)** is an independent creative communications agency with the "ambition of stopping the world in its scroll with stories that earn a place in culture." The agency, which is based in New York and has offices in Chicago and Los Angeles, combines PR, digital, and social. Clients include Abercrombie & Fitch, Motorola, American Express, Chipotle Mexican Grill, Beam Suntory, Meta, Ferrara, H&M, Walmart, and Nike. Day One is Ad Age's A-List 2022 Social Media, Influencer Agency of the Year.
- **Formative (formativeco.com)** is a Seattle-based advertising agency that designs and launches campaigns, programs and platforms "driven by work that matters," maximizing impact for social good and purpose-driven brands. Services range from executive brand and communication, influencer programs, purpose-driven campaigns (e.g., brand strategy, creative and production), digital experiences and program design (organizational design, content strategy). Clients include Microsoft, Kaiser Permanente, and the University of Washington.
- **Grey (grey.com)** is a WPP agency founded in 1917, has 3,600 employees across 32 creative studios, constituting one global agency. Since 2021, it has been Agency of the Year six times (Ad Age, Adweek, Cannes Lions International Festival of Creativity, etc.) Ad Age named Grey the 2021 Comeback Agency of the Year. The agency's mission is to become the world's leader in applying creativity (called Famously Effective) to solve business problems. Per WARC, Grey came out on top as the most successful of the major agency networks in creative effectiveness. The agency is renowned for creative storytelling and global brand-building at scale and partners with AKQA, the world-class innovation and experience design agency. Clients include P&G, GSK, Nestlé, Lilly, Advil, Lindt and Pfizer.
- **Known (known.is)** is an independent marketing agency that brings together science, technology and creativity to set a new standard for modern marketing, promoting its unique value proposition: "Fully integrated. Tech-enabled. Relentlessly optimized." Services range from data science and engineering, creative/production, experiential, media planning and buying, social, market research, advanced analytics, business innovation and brand strategy/identity. The agency has 500 full-time employees across six offices, including a team of data scientists, and has 12 AOR clients. Clients include HBO Max, TikTok, Beyond Meat, Just Egg, Alibaba US and Talkspace.
- **L&C (lanfrancocordova.com)** is an independent creative agency founded by two immigrants from Peru who believe all brands require ideas and communication that break cultural and geographical barriers. Headquartered in New York City with a production studio in Lima, the agency creates effective, award-winning campaigns and content with outstanding production value. The agency is Ad Age's A-List Newcomer Agency of the Year, The One Show Independent Agency of the Year, and Cannes Lions Grand Prix Winner. Clients include Dole, GE, Mini, and Foot Locker.
- **Maximum Effort (maximumeffort.com)** is a NY-based digital marketing agency and LA-based film production company founded in 2018 by Ryan Reynolds and George Dewey that makes movies (namely Deadpool, Free Guy, etc.), TV series, content, ads, and "cocktails for the personal amusement of Hollywood Star Ryan Reynolds." The company name is a reference to a catchphrase from Reynolds' film Deadpool. Maximum Effort's marketing arm was acquired by advertising software and performance TV platform company MNTN in June 2021. Recent projects include ads for Reynolds-owned companies—Aviation Gin (now part of Beverage company Diageo) and Mint Mobile.





- **Mekanism ([mekanism.com](https://mekanism.com))** 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 equity-backed 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.
- **PMG ([www.pmg.com](https://www.pmg.com))** is a global independent digital agency. In their own words, they use “strategy, creative, media, and insights to deliver Digital Made For Humans, as well as its proprietary marketing intelligence platform Allii” (the licensing of which accounts for 20% of the agency’s revenue). The agency has more than 600 employees globally and is based in Fort Worth, Texas, with offices in Austin, Dallas, Atlanta, Cleveland, London and New York. Clients include Apple, Athleta, Best Western Hotels & Resorts, McDonald’s, Nike, Old Navy, Sephora and Shake Shack. The agency is now Nike’s North America media AOR and was named Kohler’s media agency of record last year. PMG was named Adweek’s Breakthrough Media Agency of the Year, and ranked by Deloitte, Inc., Entrepreneur and Adweek as one of the fastest-growing companies in the nation.
- **Quigley Simpson ([quigleysimpson.com](https://quigleysimpson.com))** is a fully integrated, multidisciplinary independent agency with offices in LA and NYC and the largest Women’s Business Enterprise National Council (WBENC)-certified advertising agency in the country. The agency has a long track record with clients like JPMorgan Chase and Procter & Gamble (a multi-year member of P&G’s diversity committee), where diversity and inclusion are core to their operating model and brand ambitions. Clients also include Philips, NBC Universal, Hulu, Yelp, and Febreze. Under one roof, and operating as one team, the agency offers “Brand-Led and Demand-Driven” services ranging from insights and strategy, creative, media, performance video, data and analytics, social, customer experience, and commerce.
- **Rethink ([rethinkideas.com](https://rethinkideas.com))** is one of the largest global independent agencies. The Vancouver-based agency has over 300 employees across offices in New York, Toronto, Vancouver, and Montréal and was selected as a top 10 2022 innovative agency by Fast Company. Rethink is the Effies’ most effective independent agency in North America, and Ad Age’s 2021 Creative Agency of the Year. It is the second-ranked independent agency in the world by the 2021 Cannes Lions. The agency joined the ICOM network of independent agencies in 2018. Agency services include branding, creative, advertising, design, online, digital, pay-for-performance, and social media. Clients include IKEA, Scotts, Heinz, Kraft, Coors Light, and Molson.
- **SS+K ([ssk.com](https://ssk.com))** is a NY-based agency that combines the rigor of political strategy and the power of creativity to help brands navigate, create, and lead meaningful change. Agency services include creative (integrated, content creation, branding, identity design), strategy (brand purpose, strategy, etc.), and change management (corporate reputation, CEO communications, business transformation). The agency’s proprietary Social Forces™ Monitor is a cultural monitoring tool to “identify and understand changing patterns in consumer behavior that have the gravitational pull to move people.” Clients include Facebook, HBO, Planned Parenthood, Microsoft, E\*TRADE, The New Yorker, and WhatsApp.
- **The Stable ([thestable.com](https://thestable.com))** 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.
- **The Starr Conspiracy ([thestarrconspiracy.com](https://thestarrconspiracy.com))** is a B2B marketing agency located in Fort Worth TX and San Francisco CA, “for innovative brands creating the future of workplace solutions.” Services range from strategy, research, branding, content, digital, development, PR/AR, and video. They take pride that one-third of employees have been at the agency for more than five years (they call them The Inner Ring). The firm has worked with over 600 innovative workplace technology brands and has a strong record of enterprise software expertise. Clients include SAP, Oracle, Equifax, Headspace, ADP, TriNet, and Zendesk.
- **VNFT or VaynerNFT ([vaynernft.co](https://vaynernft.co))** is a recent VaynerX venture, founded to help leading intellectual property owners make optimal use of NFTs. The firm is partnering with brands, celebrities, athletes, artists, personalities, and associations to help them strategically map their priorities in the NFT space that create value for their communities. Composed of Crypto creatives, strategists, and enthusiasts, the 30-person team offers various services from exploration, education, and consulting to marketing strategy and NFT partnerships. Client implementations include: Pepsi Mic Drop NFT collection, Budweiser, and others.
- **Translation ([translationllc.com](https://translationllc.com))** helps brands reach diverse and passionate audiences, “translating the language of culture for brands.” Based in Brooklyn, and with offices in San Francisco and Los Angeles, the agency works with UnitedMasters, which creates a unique opportunity for data-backed creativity and exclusive partnerships. Per Ad Age, the agency grew revenue by 97% from \$30 million in 2020 to \$59.3 million in 2021. Clients include State Farm, Beats by Dre, AT&T, McDonald’s, NBA, Kaiser Permanente, Nike, HBO, Apple Music, and Budweiser. The agency was named #3 on Ad Age’s 2022 Agency A-List and awarded Ad Age’s 2021 Small Agency of the Year.



## Noteworthy quotes

- » “In-house agencies had already begun expanding their digital and programmatic media capabilities before the pandemic, which only accelerated these efforts.” —Emily Foster, Director, **IHAF**
- » “You can no longer treat talent like you have all the power because you don’t.” —Stephanie Olson, Founder and CEO, **We Are Rosie**
- » “Advertising is made less impactful because of the relative absence of diverse creative voices.” —Andréa Mallard, Chief Marketing Officer, **Pinterest**
- » “Creativity is born from inclusivity.” —Rodrigo Jatene, Chief Creative Officer, **DDB Chicago**
- » “We need to help creatives prioritize and not get bogged down in non-priorities or arbitrary deadlines. A culture of urgency is only adding to the performance anxiety, robbing people of time and space to be creative.” —Karen Costello, Chief Creative Officer, **Deutsch LA**
- » “We are entering ‘Web3’—the next stage of digital evolution. It is an incredibly fertile environment for startups which are focused on transforming the marketing and advertising sector through new technologies.” —Sanja Partalo, Managing Partner, **S4S Ventures**
- » “Agency leaders will need to reconsider the future of the agency office to be less about fixed space and more about flexible ambiances.” —Marla Kaplowitz, President and Chief Executive Officer, **4A’s**
- » “RFPs aren’t helping drive new business for creative agencies because they’re the business equivalent of putting out a cattle call.” —Jeff Meade, Founder and CEO, **MEADE**
- » “The pandemic has been an extraordinary catalyst for growth.” —Brian Wieser, Global President of Business Intelligence, **GroupM**

- » “All of our blue-chip clients should have an agency of record and I think they always will. I think we’re going to continue to see a lot of movement.” —Stephanie Olson, Founder and CEO, **We Are Rosie**
- » “It is always easier to challenge your agency than to change agencies.” —Steve Boehler, Founder/Partner, **Mercer Island Group**
- » “Clients and agencies need to become partners again.” —Michael Farmer, Chairman/CEO, **Farmer & Company LLC**
- » “Agencies should be generous in their praise and always model the behavior they expect from clients.” —M.T. Fletcher, Columnist, **Ad Age**
- » “As a leader, I’ve always tried to bring people forward and help them believe in themselves, to nudge and prompt.” —Colleen DeCourcy, President, Chief Creative Officer, **Wieden+Kennedy**
- » “The most important questions you should ask your agency are staffing questions—and the most important single question is, ‘What are you doing to compete effectively for the best talent?’” —Steve Boehler, Founder/Partner, **Mercer Island Group**
- » “People need to be able to work together and learn from each other to be their best.” —Yannick Bolloré, Chairman and CEO, **Havas Group**
- » “The client-agency relationship is in dire need of a reset. Great work often requires great partnerships. And great partnerships require respect.” —Arwa Mahdawi, **Freelance Columnist and Brand Strategist**
- » “I think that ad agencies are tired of feeling the lack of respect that shows up in so many ways. It shows up in timelines, it shows up in fees, it shows up in jump balls. It shows up in extraordinarily long pitches, it shows up in not having a seat at the table, it shows up in being actively dismissed or erased for our contribution. I feel like agencies are feeling dismissed and that the value of what we provide is being called into question every day.” —Kristen Cavallo, CEO, **The Martin Agency**

## Looking for a better marketing partnership management solution?

We offer enterprise-grade, automated, Software as a Service (SaaS) based solutions, designed to significantly improve the ability of brand advertisers to effectively manage their valuable marketing agency and supplier relationships.

**Click here** to see what our Agency Partnership Management Software can do for you, ad agencies, and suppliers.





- » “We believe this is the future of business—defining the right problem and identifying the right experts to solve it.” —David Alberts, Co-Founder, **BeenThereDoneThat**
- » “In a post-pandemic world with varying levels of economic uncertainty, agencies may feel the need to take on every client who walks through the metaphorical front door. However, this approach sets up agencies (and their clients) for failure.” —Nick Chasinov, Founder and CEO, **Teknicks**
- » “Building social value, investing in people, respecting the environment—all have assumed their rightful place, not only as key elements of corporate reputation, but as hallmarks of good management and long-term business growth.” —John Wren, Chairman and CEO, **Omnicom Group**
- » “38 other independent agencies won 60+ of the total US creative reviews recorded, hence capturing about a third of the spend volume reviewed in 2021.” —Olivier Gauthier, CEO and Founder, **COMvergence**
- » “At their best an agency is a collection of individuals who work together to become more than the sum of their parts, a force multiplier, a diverse group who bring their experiences and skills to bear on any and every client problem.” —Alastair Green, Homemaker and Freelance CD, former Executive Creative Director, **Team One**
- » “Robust partnerships that produce great work and deliver business building impact require a collaborative approach as well as an alignment of shared values and beliefs.” —Marla Kaplowitz, President and CEO, **4A's**
- » “There is a dated view that you bring work in-house for one reason and one reason only, which is to save money. But there are so many other benefits that we found.” —Lou Arbetter, VP, Content and Production, **PepsiCo Beverages North America**
- » “Finding the right ad agency is a lot like dating: some partnerships will fail miserably; others will exemplify the perfect chemistry, and each (party) will carry with them their own set of red flags and baggage that is symbolic of past relationship mistakes.” —Emmy Liederman, Agencies Reporter, **Adweek**
- » “The industry average hovers around 25% to 28% turnover, and that’s during normal times.” —Serena Anthony, Chief People Officer, **GroupM North America**
- » “Creative work of all types—one of the linchpins of why brands and agencies forge partnerships— is significantly undervalued and overlooked.” —Marla Kaplowitz, President and CEO, **4A's**
- » “Having a diverse pitch team made up of different backgrounds, skill sets, and perspectives is so incredibly important because it elevates our collective thinking for more strategic business-driving solutions.” —David Calkins, Chief Growth Officer, **Spark Foundry**
- » “Face it: in the war for talent, talent has won.” —Tony Stanol, President, **Global Recruiters of Sarasota**

- » “Our vision of the metaverse as a continuum challenges prevailing, narrower views and highlights why organizations must act today, or find themselves operating in worlds designed by, and for, someone else.” —Paul Daugherty, Group Chief Executive/Technology and Chief Technology Officer, **Accenture**
- » “By changing how we make work, we can make a significant reduction in the environmental impact of our activity.” —Richard Glasson, Global CEO, **Hogarth**
- » “A differentiated agency is one that focuses on the solution rather than the process and management of the process to arrive at the solution. A great agency never lets process get in the way of progress.” —Cory Treffeletti, SVP, Marketing Executive, **FIS**
- » “Change has changed, and agency networks need to get ahead and seek to become a mission critical multiple for client businesses.” —Ian Millner, CEO, **Cheil Connect+**
- » “Would you be willing to bet money on your intuition? If you’re not eliciting client feedback via satisfaction surveys, you already are.” —Jeff Meade, Founder and CEO, **MEADE**
- » “You probably won’t see us building an agency in the metaverse—but you will see us working with clients in the space who are looking to show up in the world, virtual and real, as brands that know their purpose and are connecting with people in valuable ways.” —Rebecca Groff, Global Director of Communications and Public Relations, **Wieden+Kennedy**
- » “We’re working very closely with our marketing partners to standardize how we work with agencies and put best practices in place. We work very closely with our procurement partners.” —Kerry Kielb, Director, Agency Strategy and Operations, **AT&T**
- » “It’s hard to read the label when you’re inside the bottle. The best thing about in-house agencies is that they are inside. The challenge is that they are well... inside. Sometimes getting an external perspective to build on an internal point of view is exactly what the doctor ordered.” —David Alberts, Co-Founder, **BeenThereDoneThat**
- » “They [creative AOR Curiosity] feel less like an agency and more like an extension of our own team.” —Kacy Cole, VP of Marketing, **Holland America**
- » “The best marketers convince their organizations that brand growth is a long-term game and build long-term relationships with their agencies.” —Erik Arnell, CEO, **BBDO Nordics**
- » “Getting your agency roster right will improve the performance of your agencies, increase the value of your advertising budget by eliminating duplication and bottlenecks, and allow you to focus your investment and optimize delivery.” —Darren Woolley, Founder, **TrinityP3**
- » “There are some things that make sense to be in-house (data-driven analysis and product-driven strategies, eg), but other pieces make more sense residing in an agency.” —Nancy Hill, CEO, **Marcus Thomas**



- » “We’re now more in line with each other, working on solutions together, same P&L, so there’s no competing forces getting in the way.”  
—David Droga, CEO, **Accenture Song**
- » “We look for people who are optimistic and supportive of the relationships and understanding of the challenges of both sides, because we’re often playing a mediation role. You really have to play that role of Switzerland to improve the relationships as you go.”  
—Kerry Kielb, Director, Agency Strategy and Operations, **AT&T**
- » “We have a duty of care as marketers, as agencies and brands to the next generation of people so they don’t grow up with the same stuff we are seeing now.” —Rahul Titus, Head of Influence UK and EMEA, **Ogilvy**
- » “Today’s global marketers need both agility and scale from their agency partners to properly support their businesses across international markets.” —Kyoko Matsushita, CEO, **WPP Japan**
- » “It’s actually a code in our timesheet that you can take a ‘Fuck it’ day.”  
—Sandi Hildreth, Global Director of Human Resources, **Wieden+Kennedy**
- » “If you listen to what’s going on in the market and the current dynamics, it’s clear people want to reimagine the office.” —Mat Baxter, Global CEO, **Huge**
- » “The fact is there are some very solid reasons as to why you may have more agencies and suppliers than you need. And that is not a good thing, as each extra one on your roster is consuming time and money by just being there.” —Darren Woolley, Founder, **TrinityP3**
- » “The in-house team, or hybrid model—call it what you will—ultimately relies on collaboration with agencies and partners.” —James Donovan, Global Audience and Addressable Media Manager, **Coca-Cola**
- » “As we enter a new age of engagement, marketers building agency models are tasked with constructing partnership ecosystems that run on the rails of data and technology.” —Greg Paull, Co-Founder and Principal, **R3**
- » “Being a good client is more important than ever. Client-side marketers should approach this in the same way they approach brand building or brand loyalty programs.” —Nicole Apple, Head of Global Strategic Agency Management, **Kimberly-Clark**
- » “We have to be heat-seeking missiles for talent. There has to be a plan, and it has to be measured.” —Vicky Free, Head of Global Marketing, **Adidas**
- » “Brands and agencies need to ‘reframe’ their relationship and ‘put the idea at the center of everything’ in order to produce the most impactful work.” —Todd Kaplan, CMO, **Pepsi**
- » “We want the world to know that Ukraine is still open for business and has the potential to be a key cultural and digital technology European hub.” —Oleksandr Tkachenko, Minister of Culture and Information Policy, **Ukraine**

- » “At best, marketing procurement is an enabler and facilitator; at worst, it can be a roadblock and bottleneck.” —Bill Duggan, Group Executive VP, **ANA**
- » “We’re looking to get into bigger global pitches as our network expands and grows so that we will become the ultimate digital-first challenger.”  
—Mark Penn, CEO, **Stagwell**
- » “We decided to reframe our dialogue and call ourselves co-conspirators.”  
—Todd Kaplan, CMO, **Pepsi**
- » “When building teams, mechanisms are important. Goal setting, check-ins, and feedback loops all work well. Then beyond the mechanisms, you have to give people room to innovate.” —Evaristus Mainsah, VP, People x Experience, **Amazon AD**
- » “Copper Giants is a model for how creative and in-house agencies can thrive in tandem.” —Danny Gonzalez, Executive Creative Director, **Goodby, Silverstein & Partners**
- » “Frankly, we’re late to the party and we have to own that. Our industry does not reflect the communities that we serve globally.”  
—Vicky Free, Head of Global Marketing, **Adidas**
- » “Some are going faster and some are going deeper but everyone today realizes that greenwashing won’t do it anymore.” —Arthur Sadoun, CEO, **Publicis Groupe**
- » “I don’t need 20 of me. I need people who come from different places, perspectives, and backgrounds to bring that to the agency. Otherwise, you’re just repeating yourself.” —Gary Vaynerchuk, CEO and Co-Founder, **VaynerMedia**
- » “Excellence is not a formula. Excellence is the grand experiment. It ain’t mathematics. It’s jazz.” —Dan Wieden (1945-2022), Co-Founder, **Wieden+ Kennedy**
- » “Being together and collaborating is our industry’s secret sauce.”  
—Rob Reilly, Global Chief Creative Officer, **WPP**
- » “Every crisis is an opportunity.” —Brian Chesky, Co-Founder and CEO, **Airbnb**
- » “Clients at the end of the day are going to make sure they are getting the work and if they are I don’t think they care whether you are doing it remotely, in the office, hybrid or whatever, because they are going through the same thing.” —Tom O’Keefe, Founder and CEO, **OKRP**
- » “While marketing procurement’s role at every company is different, I believe they all have the potential to have one thing in common: servant leadership... The servant leadership philosophy is based on the idea of interacting with others (regardless of position) in a manner that results in achieving authority rather than power.” —Kevin McCollum, Manager, Indirect Procurement, **The Hershey Company**
- » “Marketers continue to seek closer integration between their creative and media partners.” —Greg Paull, Co-Founder and Principal, **R3**





- » “Never once have I heard, ‘I just want to commute to an open concept office with Razor scooters and Keurig coffee machines.’” —Ryan Kutscher, Founder, **Circus Maximus**
- » “From the decline of cookies to new understanding of attention to maturing direct-to-consumer and e-commerce models, the media landscape continues to shift constantly.” —Will de Lannoy, Managing Partner and Head of Communications Strategy, **Anomaly**
- » “If you make strict rules of four or five days in the office, you narrow down the workforce you can hire.” —Jeff Goodby, Co-Founder, Goodby, **Silverstein & Partners**
- » “Advertising is a people business... It’s our responsibility as veterans in the industry to not only learn and understand generational differences and adapt, but to pass on the best parts of our experience to help motivate and develop new talent properly, which sometimes means pushing them out of their comfort zone.” —Barry Cupples, CEO, **Talon Outdoor**
- » “It’s not an excuse to say, ‘Well, the cobbler has no shoes, and we’re focusing on clients, so we don’t do it for ourselves.’ Most agencies suffer, because they don’t have a clear articulation of their offering, and positioning. And you have to have that today.” —Matt Weiss, President, **Huge Brooklyn**
- » “Not only does marketing procurement bring the marketing ideas and strategy to life, but drives meaningful change in the industry, helping to establish more eco-friendly, diverse and equitable behaviours within marketing.” —Alice Tomlinson, Junior Manager, Marketing Sourcing, **WFA**
- » “We find that purposeful face-to-face collaboration—like we see on production and shoots—is a huge driver of the quality of output.” —Judith Carr-Rodriguez, CEO and Partner, **FIG**
- » “When you’re talking about the infusion of brands and culture... to have that ability to connect in-house, every single minute of every single day, the power in that is phenomenal.” —Diana Frost, Chief Growth Officer, **Kraft Heinz North America**
- » “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**



# Work and Performance

Driving better work, stronger performance,  
and value from the partnership





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

### Year-end summary

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#### February 2022 | Volume 61

The metaverse was one of the main topics of conversation at recent events, including CES. Now NFTs are being built by brands and promoted at major events like the Superbowl. In their beginnings, NFTs were known for silly items selling for silly prices: Last year, Zoë Roth, better known as Disaster Girl, sold her iconic image—where she’s eying a camera as a house burns—as an NFT for \$500,000 at an auction. The YouTube clip “Charlie Bit My Finger,” one of the original viral videos some 14 years ago, sold for \$760,999 and is no longer online. Now, NFTs are getting serious. FOMO is real, and brands are rushing to understand how to engage communities with NFTs. Look at Budweiser Royalty, which sold out of its 11,000 available tokens, giving music fans access to exclusive perks associated with emerging musical artists. Bud Light’s N3XT Collection is a similar campaign. Adidas launched an interactive art project, featuring user-generated and creator-owned art, in collaboration with digital artist @zachlieberman, sold as NFTs. And there are many others, from Hilton and clothing brand PacSun to Frank’s RedHot.

#### March 2022 | Volume 62

If there is turmoil in talent management, there are also profound changes in how companies produce work. A recent article asked, “Can Brands Survive Without Advertising?” speaking to a trend towards non-traditional marketing techniques like word-of-mouth marketing and sponsored content. Agencies are also getting better at saying “no” and at asking for fair compensation. The headline, “No agency could have done this,” (Coinbase CEO’s controversial tweets) prompted the industry to call on unfair practices, issues around ownership of work and growing tension about the real (or perceived) lack of appreciation and respect by some clients. Agencies are also getting more vocal. For example, Starch Creative claimed that Laird Superfood, an Oregon-based organic coffee and food maker, had appropriated the shop’s work following an unpaid RFP.

#### April 2022 | Volume 63

Can creativity be a force for good in times of conflict? It can, but more importantly, it should. Brands stepped up and made some difficult commercial decisions as a result, suspending or stopping Russian-related business. These events put things into perspective and create great tension at times, such as the CNN-Applebee’s controversy. Applebee’s paused advertising on CNN after the network ran a picture-in-picture Applebee’s ad during news coverage of the war in Ukraine. At one point, the words “RUSSIA INVADES UKRAINE” from CNN’s coverage appeared next to a man dancing in the Applebee’s ad. The backlash was immediate. Brands are carefully navigating these difficult times.

#### June 2022 | Volume 64

It’s June, so brand advertisers and agency leaders are looking forward to their in-person Cannes reunion. With reduced attendance, it’s obvious the Cannes Lions International Festival of Creativity is no longer the event it used to be. Yet it remains an amazing and unique opportunity to learn about the brilliant work produced by our industry peers around the globe, especially given that agencies and clients are at a crossroads with less emphasis on traditional marketing communication and more focus on digital experiences, marketing automation and e-commerce. The interest in marketing automation is largely being driven by digital transformation efforts, a need for agility, speed and flexibility, and a push to achieve efficiencies and improve productivity.

#### August 2022 | Volume 65

Passion comes in a lot of different flavors in our industry. At Cannes Lions, Greenpeace and the creative advocacy group Clean Creatives conducted a series of stunts and social media tactics to raise awareness about environmental issues, including protesters displaying signage with hashtag #BanFossilAds and, dressed in dog costumes, staging a beach invasion to call out the ad industry’s creation of ads for fossil fuel companies.

#### October 2022 | Volume 66

The Lions Creativity Report 2022 (“the ultimate global benchmark for impactful creativity”) was released in September, showcasing brilliant work from top brands and agencies across the globe. Five key trends emerged from the winning work:

1. Economic uncertainty brings a new appreciation and approach to effectiveness
2. Creativity goes beyond raising awareness to identify a solution, share it and scale it
3. Vibrant craft turns heads and gets results
4. Tech takes on a strong supporting role for creative concepts, helping to drive commercial goal
5. The world is becoming more inclusive and accessible through head-turning work driving positive change

#### December 2022 | Volume 67

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.





## Awards and recognition

- **Adweek editors** picked creative agencies whose work they are most excited to see in 2022: 360i, Gut, Fred & Farid L.A., Arts & Letters, Majority, Ogilvy, and Movers+Shakers.
- Per **MediaPost**, the 2021 Holding Company of the Year is **GroupM**; 2021 Media Agency of the Year is **Wavemaker**; 2021 Search Agency of the Year is independent **NP Digital** (the firm increased revenue by 169% YOY, with \$70 million in revenue for 2021); 2021 Creative Agency of the Year is Cincinnati-based agency **Empower**, which launched Emerge to combine first- and third-party data, primary research, syndicated research, and data from search, social, and web analytics; 2021 Independent Agency of the Year is **USIM**; 2021 Client of the Year is **Apple**.
- Ad Age’s **2021 Marketers of the Year** included:
 

1. NFL	6. L’Oréal
2. Target	7. LeBron James
3. Tesla	8. WarnerMedia
4. Kraft Heinz	9. FaZe Clan
5. Pinterest	10. FTX
- Per Ad Age, the **top 5 Super Bowl TV commercials** were:
  1. Coinbase: WAGMI (“We’re All Going to Make It”) by Accenture Interactive
  2. GM/Chevrolet: New Generations by McCann
  3. Uber Eats: Uber Don’t Eats by Special Group US
  4. Toyota: The Joneses by Saatchi & Saatchi LA/Dallas
  5. Lay’s: Stay Golden by Highdive
- **WPP** was the most awarded company at the 2021 Cannes Lions Festival, ranking number one across all three WARC rankings for media, creative, and effectiveness.
- European Effie’s named **Havas Group** “Agency of the Year” during their 2021 awards—with gold trophies for “Undercover Avatar” by Havas Sports and Entertainment for Association L’Enfant Bleu, and “Tomorrow’s Water” by Havas Turkey for Reckitt. R3 ranked Havas Creative #1 in Europe, #1 in the UK, and #2 globally in their 2021 creative new business league standings.
- Per Fast Company, the **10 most innovative advertising agencies of 2022**:
 

1. TBWA Worldwide	6. The Community
2. Mischief @ No Fixed Address	7. Check My Ads
3. Wieden+Kennedy	8. SS+K
4. FCB	9. Observatory
5. Rethink	10. Engine Creative
- Per Fast Company, the **most innovative 2022 companies in social media** are: Shopify, Tinder, Koji, Genies, Rally, Ooooo, Pearpop, Launch House, Lumanu, and Fave.

- The **Cannes Lions Festival** named Anheuser-Busch InBev (AB InBev and owner of Budweiser, Stella Artois, and Corona) its 2022 “Creative Marketer of the Year.” The brand won 40 individual Lions in 2020 and 2021—including two Grand Prix, two Titanium, nine Gold, 10 Silver, and 17 Bronze.
- The **New York Festivals International Advertising Awards** introduced a new category group, called “Hell’s Kitchen,” designed to shine a spotlight in 2022 on creative work produced on behalf of legalized and regulated category vice brands like alcohol, gambling, cannabis, and tobacco-related products.

“Giving agencies feedback is a tremendous skill. It’s not enough to just say, ‘I don’t like this.’ You need to have seen enough creative to actually give effective feedback.”

Chris Brandt  
CMO, Chipotle Mexican Grill

- The Publicis Groupe Spark Foundry (part of Publicis Media) is the **2022 Adweek US Media Agency of the Year**. The agency landed Meta and KFC and 14 other new clients. Publicis Media (Spark Foundry, Zenith Starcom) won \$7 billion in new business in 2021.
- Five **Stagwell** agencies have been honored in the Ad Age 2022 Agency A-List and Creativity Awards: 72andSunny, Anomaly, Assembly, Doner, and YML. The accolades are: Standout Agency for 72andSunny, for new client wins, including United Airlines; #9 A-List Agency of the Year for Anomaly, which took on 26 new business assignments in the US, including Jimmy John’s, Netflix, Oculus, Denny’s, Amazon Corporate, and Dunkin’; Purpose-Led Agency of the Year for Assembly; Standout Agency for Doner, with new client wins including Travelocity and Bloomberg; and Customer Experience Agency of the Year for YML.



- **Omnicom Media Group agency OMD Worldwide** was named the best-performing global media network overall for the third consecutive year by RECMA (Research Company Evaluating the Media Agency Industry). The ranking is based on 700 agencies across 47 markets and a review based on 19 KPIs. OMD is also #1 in RECMA Overall Activity Volume, with \$36.7 billion and almost 10% of industry shares; OMD was the most-awarded agency network at the 2021 Cannes Lions Festival.
- **Ad Age** revealed its 2022 Agency A-List, naming Mischief @ No Fixed Address as its Agency of the Year. The rest of the top 10 in order: R/GA, Translation, Goodby Silverstein & Partners, VaynerMedia, Alma, FCB Global, Droga5, Anomaly, and Fig.
- **Ad Age** 2022 Agency Standouts: 72andSunny, BBH USA, Cartwright, The Community, Doner, Gut, Johannes Leonardo, Joan, The Martin Agency, McCann Worldgroup, Mother, Tombras, Wieden+Kennedy, Work & Co., and WorkInProgress.
- **Ad Age** 2022 In-House Agency of the Year: Microsoft-owned LinkedIn and its Creative Studio. Creative Studio's 30-people team handles projects on its own or works with external agencies, including BBH and McCann.
- **Havas Sports & Entertainment's "Undercover Avatar"** was the most-awarded campaign in the world in 2021, per the WARC annual rankings.
- Per Adweek, **Spark Foundry, MediaCom** (for the second year in a row), and **VaynerMedia** were named Adweek's US, global, and breakthrough media agencies of the year, respectively.
- **Omnicom's TBWAWorldwide** global collective was awarded Ad Age's first Network of the Year. It was previously named Adweek's Global Agency of the Year, and #1 in Advertising in Fast Company's Most Innovative Companies.

- **Interpublic Group's McCann Worldgroup** was named "Network of the Year" at the International ANDY Awards 2022. McCann Worldgroup agencies won awards for eight individual campaigns from eight countries, including Commonwealth/McCann, the global business unit dedicated to Chevrolet, winning three awards; 215 McCann San Francisco collecting two awards for its Xbox Halo Infinite campaign; and McCann New York winning for its New York Lottery campaign.
- Per the Dubai Lynx International Festival of Creativity: **Havas Middle East** won two Grand Prix awards, four Gold, five Silver, 10 Bronze, and nine Shortlist across four projects and three clients (adidas, Friends of Cancer Patients, Barakat Group of Companies), as well as runner-up Agency of the Year and Network of the Year.
- Online dating application Tinder won the top honor, The Diamond ECHO, and the Gold Award for Mobile for its campaign "Swipe Night," a live-action miniseries that was available only within the Tinder app. **72andSunny** created the work.
- **MediaCom and Choreograph** won the Echo Gold Marketing Data Strategy of the Year award for a campaign titled "Vaccine Readiness Model." The Mac: Digital Party store-opening event for Mac Cosmetics, created by Wunderman Thompson Argentina, and The Golden Oven campaign from McCain and FCB Canada won Global Social Media awards.
- A campaign for the restaurant chain Applebee's received the **2022 Grand Effie** for its TikTok-viral collaboration with pop country singer Walker Hayes, who performed his country hit "Fancy Like" with the lyrics featuring a date night at Applebee's.

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AGENCY MANIA SOLUTIONS

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AWARD NAME	DESCRIPTION	AWARDS CATEGORY	CATEGORY OF WORK	GEOGRAPHICAL REGION	NOMINATION DEADLINE	WINNERS ANNOUNCED
<b>Ad Age Agency A-List</b>	Ad Age's A-List is the most influential and best performing agency network overall. It is based on 700 agencies across 47 markets and a review based on 19 KPIs.	Agency Network	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Nov 2022	Jan 2023
<b>Ad Age Agency Standouts</b>	Ad Age's Agency Standouts are the most innovative and creative agencies in the industry.	Agency Standouts	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year</b>	Ad Age's Agency of the Year is the most innovative and creative agency in the industry.	Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - In-House</b>	Ad Age's Agency of the Year - In-House is the most innovative and creative in-house agency in the industry.	In-House Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Network</b>	Ad Age's Agency of the Year - Network is the most innovative and creative network agency in the industry.	Network Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Global</b>	Ad Age's Agency of the Year - Global is the most innovative and creative global agency in the industry.	Global Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - US</b>	Ad Age's Agency of the Year - US is the most innovative and creative US agency in the industry.	US Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	US	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - International</b>	Ad Age's Agency of the Year - International is the most innovative and creative international agency in the industry.	International Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	International	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Breakthrough</b>	Ad Age's Agency of the Year - Breakthrough is the most innovative and creative breakthrough agency in the industry.	Breakthrough Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Innovative</b>	Ad Age's Agency of the Year - Most Innovative is the most innovative and creative most innovative agency in the industry.	Most Innovative Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Creative</b>	Ad Age's Agency of the Year - Most Creative is the most innovative and creative most creative agency in the industry.	Most Creative Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Awarded</b>	Ad Age's Agency of the Year - Most Awarded is the most innovative and creative most awarded agency in the industry.	Most Awarded Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Successful</b>	Ad Age's Agency of the Year - Most Successful is the most innovative and creative most successful agency in the industry.	Most Successful Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Influential</b>	Ad Age's Agency of the Year - Most Influential is the most innovative and creative most influential agency in the industry.	Most Influential Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Respected</b>	Ad Age's Agency of the Year - Most Respected is the most innovative and creative most respected agency in the industry.	Most Respected Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Valued</b>	Ad Age's Agency of the Year - Most Valued is the most innovative and creative most valued agency in the industry.	Most Valued Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Trusted</b>	Ad Age's Agency of the Year - Most Trusted is the most innovative and creative most trusted agency in the industry.	Most Trusted Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Reputable</b>	Ad Age's Agency of the Year - Most Reputable is the most innovative and creative most reputable agency in the industry.	Most Reputable Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Esteemed</b>	Ad Age's Agency of the Year - Most Esteemed is the most innovative and creative most esteemed agency in the industry.	Most Esteemed Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Honored</b>	Ad Age's Agency of the Year - Most Honored is the most innovative and creative most honored agency in the industry.	Most Honored Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Celebrated</b>	Ad Age's Agency of the Year - Most Celebrated is the most innovative and creative most celebrated agency in the industry.	Most Celebrated Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Distinguished</b>	Ad Age's Agency of the Year - Most Distinguished is the most innovative and creative most distinguished agency in the industry.	Most Distinguished Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Eminent</b>	Ad Age's Agency of the Year - Most Eminent is the most innovative and creative most eminent agency in the industry.	Most Eminent Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Preeminent</b>	Ad Age's Agency of the Year - Most Preeminent is the most innovative and creative most preeminent agency in the industry.	Most Preeminent Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Prominent</b>	Ad Age's Agency of the Year - Most Prominent is the most innovative and creative most prominent agency in the industry.	Most Prominent Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Influential</b>	Ad Age's Agency of the Year - Most Influential is the most innovative and creative most influential agency in the industry.	Most Influential Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Respected</b>	Ad Age's Agency of the Year - Most Respected is the most innovative and creative most respected agency in the industry.	Most Respected Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Valued</b>	Ad Age's Agency of the Year - Most Valued is the most innovative and creative most valued agency in the industry.	Most Valued Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Trusted</b>	Ad Age's Agency of the Year - Most Trusted is the most innovative and creative most trusted agency in the industry.	Most Trusted Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Reputable</b>	Ad Age's Agency of the Year - Most Reputable is the most innovative and creative most reputable agency in the industry.	Most Reputable Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Esteemed</b>	Ad Age's Agency of the Year - Most Esteemed is the most innovative and creative most esteemed agency in the industry.	Most Esteemed Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Honored</b>	Ad Age's Agency of the Year - Most Honored is the most innovative and creative most honored agency in the industry.	Most Honored Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Celebrated</b>	Ad Age's Agency of the Year - Most Celebrated is the most innovative and creative most celebrated agency in the industry.	Most Celebrated Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Distinguished</b>	Ad Age's Agency of the Year - Most Distinguished is the most innovative and creative most distinguished agency in the industry.	Most Distinguished Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Eminent</b>	Ad Age's Agency of the Year - Most Eminent is the most innovative and creative most eminent agency in the industry.	Most Eminent Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Preeminent</b>	Ad Age's Agency of the Year - Most Preeminent is the most innovative and creative most preeminent agency in the industry.	Most Preeminent Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023
<b>Ad Age Agency of the Year - Most Prominent</b>	Ad Age's Agency of the Year - Most Prominent is the most innovative and creative most prominent agency in the industry.	Most Prominent Agency of the Year	Advertising, Branding, Digital, Marketing, Media, Online, Retail, Social, TV, Video, and more	Global	Jan 2023	Jan 2023



- Per **Ad Age's Agency Report**, 2022's holding company was Publicis Groupe. Other 2022 notables: Agency Network—TBWA; Comeback Agency—Grey; International Agency—David Madrid; Multicultural Agency—IW Group; Media Agency—Spark Foundry; Creative Agency—We Believers; Data/Analytics Agency—Digitas; In-house Agency—LinkedIn; Design/Branding Agency—Jones Knowles Ritchie; Social Media and Influencer Agency—Day One Agency; Customer Experience Agency—VML (Y Media Labs); Newcomer Agency—L&C; Purpose-led Agency—Assembly
- Per **Ad Age's Agency A-List 2022**, 10 top agencies were (in order): Mischief, R/GA, Translation, Goodby Silverstein & Partners, VaynerMedia, Alma, FCB Global, Droga5, Anomaly, Fig. 2022 Agency standouts: 72andSunny, BBH USA, Cartwright, The Community, Doner, Gut, Johannes Leonardo, Joan, The Martin Agency, McCann Worldgroup, Mother, Tombras, Wieden+Kennedy, Work & Co, WorkInProg.



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



- Per **Ad Age, 2022 top production agencies** were (in order): M s s ng P eces, Smuggler, Stink Films, Superprime, Somesuch, Arts & Sciences, Hungry Man, O Positive, MJZ, Object & Animal. 2022 Production company standouts: Anonymous Content, Biscuit Filmworks, Bob Industries, Caviar, Division7, Epoch, Little Minx, Nexus, Park Pictures, Prettybird, Psyop, Pulse, Radical, Reset, Unit9.
- Mojo Supermarket won Gold in **Ad Age's Small Agency Awards**, while Movers+Shakers took Silver. Fred & Farid LA, Lerma/, and Fitzco all won Gold awards, and Majority took the top prize in the Newcomer category.

- Publicis Media was named a "leader" in **Forrester Wave Global Media Management Services'** latest report, achieving the highest strategy category score and in data-driven media planning and execution. Other highlighted agencies were Dentsu Media, GroupM, Havas Media Group, IPG Mediabrands, Omnicom Media Group, and Stagwell Media Network.
- Forrester issued its latest report on **Marketing Creative and Content Services providers**, which featured three "leaders": WPP's VMLY&R, Omnicom Precision Marketing Group, and Accenture. "Strong performers" were Deloitte, S4 Capital's Media.Monks, WPP's Ogilvy, Omnicom's BBDO, and Publicis Worldwide. "Contenders" were digital agency Dept, Interpublic's MullenLowe and R/GA, Publicis Groupe's Leo Burnett, and dentsuMB.
- **2022 Emmy nominees** for Outstanding Commercial are Media Arts Lab's "Everyone But Jon Hamm" ad for Apple TV+; Leo Burnett Chicago's "The Lost Class" ad for Change the Ref; Droga5's "Skate Nation Ghana" ad for Meta; BBDO New York's "Teenage Dream" for Sandy Hook Promise; Commonwealth//McCann's "Walter the Cat" for Chevy Silverado; and Apple's "Detectives" ad for the Apple iPhone 13 Pro.
- **Association of National Advertisers' 2022 "In-House Excellence Awards"** celebrated CVS Health, which took "Best in Show" for its innovative "One Step Closer COVID-19 Vaccination Campaign." Molson Coors' in-house agency VOLT won the "In-House Agency of the Year" category, and L'Oréal won "Best Media Plan" for its "Defining Our Brows and Streaming Success" plan for Maybelline New York.
- Per CMO Benoit Garbe, **Anheuser-Busch** is the first company to be simultaneously ranked #1 in creative strength and effectiveness by Cannes Lions, WARC and Effie.
- Omnicom was awarded **Global Effie's Most Effective Holding Group** in 2022, thanks to wins by Omnicom agencies BBDO, DDB and TBWA. McCann Worldgroup retained its position as Most Effective Agency Network for the fourth year in a row.
- Per the 2022 Effie awards, the **top 5 in the Most Effective Agency Offices** were:
 

1. FP7 McCann Dubai	4. Sancho BBDO
2. DDB Colombia	5. McCann Worldgroup India
3. McCann Tel Aviv	
- Per the **Lions Creativity Report**, top 10 brands in 2022 were:
 

1. Burger King	4. Heineken
2. Vice	5. Corona
3. Apple	
- Top **5 agencies** were:
 

1. Dentsu Creative	4. Leo Burnett
2. We Believers	5. FCB New York
3. Publicis Italy	



- **Most creative company of the year:** WPP; Network of the year: Ogilvy; Media network of the year: OMD Worldwide; Healthcare agency of the year: Area 24 (an IPG Health Network Company); Creative brand of the year: Burger King.
- **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.

### Creativity and noteworthy work

- French fashion house **Balmain** and **Mattel** joined forces to create a 50-piece Balmain x Barbie fashion collection with pieces ranging from a \$295 T-shirt to a \$42,495 gown, as well as three unique NFTs that will be sold via online auctions.
- **Maximum Effort** launched its campaign for Mint Mobile by creating a reworked storybook "Winnie-the-Screwed" (after Winnie-the-Pooh entered the public domain), with Winnie dealing with high cell phone expenses.

- Beer giant company **AB InBev** created its own internal awards program called the CreativeX Awards to rate and celebrate the brewer's creative work in addition to submitting work to external awards programs.
- **"No agency could have done this,"** Twitter message by Coinbase CEO, about its successful QR code Super Bowl ad, drew much debate about the perception issues faced by agencies feeling undervalued by clients for their ideas.
- **Coinbase's** highly successful QR code 60-second ad, "Less talk, more Bitcoin," during the Super Bowl consisted of a colorful bouncing QR code. The brand spent \$14 million. The ad was so popular that it crashed the app.
- **April Fools' Day campaigns** were a temporary distraction given tragic events around the world: FreshDirect put croissants in a can, Hellmann's and Butterfinger joined forces to create a dessert mayonnaise, Sun-Maid added grape jerky to its menu, T-Mobile introduced a "New Magenta," and JetBlue offered a way to fight New York City congestion with flights between LaGuardia and JFK airports, to name a few.



- **ABC's "94th Academy Awards"** show experienced a surge in viewership, up 56% in 2022 with 15.4 million total viewers (vs. 10.4 million in 2021) but down compared to pre-pandemic. The event got a boost in social media, and a big wave of viewers suddenly tuning in, after actor Will Smith slapped comedian Chris Rock.
- Per **WPP**, over 95% of its top 50 clients work with at least five agencies in the company's network and have rewarded WPP with an average score of 8.1 (on a 10-point scale) for "collaboration" in the WPP 2021 client satisfaction program.
- Global beverage brand **Heineken** and its agency partner Publicis Worldwide launched a new ad, "The Closer," in which a high-tech bottle opener immediately shuts all work applications when it is used to open a bottle of beer, to address the topic of work-life imbalance.





- **Michelob Ultra** leveraged artificial intelligence and machine learning for a competition on ESPN2 and ESPN+ between tennis legend John McEnroe and virtual avatars designed to look and play like five versions of his younger self.
- Fast-food restaurant chain **Wendy's** released its own branded game mode, called "Food Fight," on Fortnite. Players are challenged to rid the world of frozen beef—an objective intentionally aligned with Wendy's modus operandi of never serving frozen beef.
- **Spotify** launched a first-party measurement tool called Brand Lift to provide its partners with improved metrics and a tool that quantifies the brand impact of promotional messages.



The industry is evolving away from outdated data-driven approaches and is learning how to harness creativity and authenticity to connect with the modern consumer."

Sandie Hawkins  
General Manager of North America  
Global Business Solutions, **TikTok**



- The **2022 Cannes Lions International Festival of Creativity** reminded us of the importance of doing good using advertising as a vehicle. For example, DDB Mexico built a system that provides credit ratings to women in Mexico who have never had them. VMLY&R built a system that archives voices of people losing theirs to motor neuron disease.
- NYC-based agency **Walrus** launched a series of posts dubbed "Dead Ideas That Never Made It Into the World" featuring rejected creative and brief recollections from brands like Staples, Spirit, Venmo, HBO and General Mills, and why something didn't make the cut.

## Industry stats, trends, and projections

- Per **Adobe**, 2022 creative trends will be centered around two primary complementary concepts: Optimism (fun, whimsy, and play) and meaningful connection (authenticity and purpose).
- Per 4A's, **key 2021 themes** were:
  1. Delivering rich customer experiences that utilize evolving technology
  2. Embracing broader corporate socially responsible work focused on sustainability and our collective responsibility to address climate change along with ongoing efforts to address diversity, equity and inclusion across all areas of business
  3. Supporting the expanding needs of our members, including the way you create value on behalf of clients and addressing aspects of friction in the new business review process
- Per P&G's Chief Brand Officer Marc Pritchard, **5 ways to better media experiences** that drive growth and value:
  1. Respect consumer data as their data
  2. Innovation in media planning and buying
  3. Connect media to commerce
  4. Innovate to immerse and engage with consumers
  5. Accelerate growth with multicultural media
- Per TrinityP3, **common problems with determining scope of work are**:
  1. The marketing plan does not currently exist (no plans, no approval)
  2. The budget is unconfirmed or changing (clearly someone with deep pockets)
  3. The details of the marketing plan are unclear (someone who is indecisive)
  4. The requirements are defined by the business, not marketing (you are actually the architect, and the real client is somewhere else)
- **Omnicom Media Group** launched a programmatic private marketplace for brands, offering 80,000 point-of-purchase screens at grocery and convenience stores, malls, gas stations, movie theaters, and other locations.
- **Dentsu International** integrated so-called attention metrics into both its media planning and buying systems and has begun transacting media buys based on it.
- Per consulting firm Boathouse, only about a third (34%) of **CEOs** have great confidence in their CMOs. 80% of CEOs think CMO turnover is due to a CMO's own failings. Per the CMO Council and KPMG, only 23% of marketing leaders have a "very effective" working relationship with their CIO, and nearly 40% describe the relationship as "moderately effective" or "not effective."



- Per Ad Age and top search consultants, five ways agencies should handle the **pitch process**:
  1. If you decline, do so early
  2. Know the difference between chemistry and alignment
  3. Keep questionnaire answers concise
  4. Stay on the consultant’s radar
  5. Be a good loser
- Per **BetterBriefs Project global report 2021**, 90% of marketers and 89% of creative agencies agree “it’s difficult to produce good creative work without a good marketing brief,” and 80% of creative agencies indicate their clients have a poor or limited understanding of what they need from a brief.

“

Transformation is the name of the game—for the company, the agency and the way in which we are trying to work.”

Robin Triplett  
Head, End to End Connections and Media,  
North America, **The Coca-Cola Company**



- Per Gartner, only 53% of **marketing decisions are influenced by data**. Despite an increased emphasis on the importance of data in marketing, 60% of CMOs plant to cut the size of their analytic departments in half by 2023 due to “failed promised improvements.”
- Per Gartner, only 42% of marketers are using their **martech stack capabilities**, the breadth of capabilities available in their martech stack overall, down from 58% in 2020. The drop is due to a significant amount of overlap among marketing technology solutions (30%), difficulty identifying and recruiting talent to drive adoption/utilization (28%), and complexity/sprawl of the marketing technology ecosystem (27%).

- 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.
- “Do you have clear swim lanes?” Per **Blum Consulting Partners**, brands must:
  1. Use their marketing partners to define asset production needs
  2. Use their agency management and procurement partners to help manage timelines and drive clarity on expectations
  3. 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 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.

## Business and digital transformation

- **Bud Light** launched its first zero-carb beer, Bud Light Next, with a new nonfungible token (NFT) project—the Bud Light N3XT Collection composed of 12,722 unique tokens priced at \$399 apiece designed in the blue and white color hues of the new brew’s packaging and giving buyers access to exclusive brand and partner events.
- French distillery **Hennessy**, in partnership with BlockBar, launched its first NFT, giving connoisseurs the chance to buy a rare Cognac and get a VIP visit to its estate in France. The two NFTs combined were available for a total of \$226,450.
- Omnicom Group’s data and analytics division, **Annalect**, announced a multi-year agreement with Affinity Solutions to integrate retailer purchase transactions (7+ billion credit and debit card transactions annually) into Omni to evaluate and analyze investments based on actual buyers and their level of spend.
- **Omnicom’s Annalect** unit agreed to partner with Affinity Solutions and license a new form of consumer intelligence data segmenting media audiences based on “past purchase data,” and will integrate it into Omnicom’s companywide operating system, Omni. Omnicom staffers will be able to plan, buy, and measure the outcomes of campaigns targeting people based on their purchasing history.



- **Omnicom** entered a partnership with Firework, the livestream commerce and shoppable video platform provider that enables brands to establish live commerce capabilities on their own websites, giving clients across all Omnicom agencies access to Firework’s enterprise suite of proprietary short-form video and livestreaming technology.
- **Adobe** launched a marketing mix modeling service, as part of the Adobe Experience Cloud, that uses artificial intelligence (through its Adobe’s Sensei AI engine) to assess return on investment in weeks rather than months and adjust media and marketing plans on the fly.
- **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
- **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.
- Per Dentsu, **10 trends are reshaping media in 2023**:
  1. Ad-supported VOD services overtaking subscription services, which is being accelerated by streaming platforms like Netflix and Disney+ adding ad-supported tiers
  2. 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 ascendance of live event marketing by major brands
  9. The continuing dominance of social algorithms
  10. The continuing shift toward “brand responsibility”

## Fight against racism, climate change, and social inequities

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- Toymaker **The Lego Group** launched an invitation to LGBTQ+ families to express themselves through a new vocabulary of play, encouraging children to “brick the rules” and offering a new lexicon from abbreviations and pronoun suffixes. The goal is to spark conversations about identity.
- Per **IAS and Good-Loop** and their online carbon calculator, a sample ad campaign that costs \$115,000 and delivers 20 million impressions at a CPM of \$6 emits about 5.4 tons of carbon—almost a third of what an average US consumer produces in a year.
- Independent agency **Mother** launched its “Mother Goods” venture, a website and Instagram account that showcase a range of products designed to change how people think about and behave around specific issues in the world, including gun control, LGBTQ+, women’s rights, and social media addiction. It includes prototype Kickback Lounge Wear, a range of bullet-resistant leisurewear and “Cúf,” a rose gold phone case, to which a handcuff is attached.

## Other/miscellaneous performance and work-related news

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- **Best Buy** launched its in-house advertising business offering, called Best Buy Ads, similar to Albertsons, Walmart, and Target. The service can help brands analyze the data from billions of interactions and customer relationships and recommend relevant ways to connect brands with consumers through data science.
- **WPP’s GroupM** launched a programmatic marketplace, named The GroupM Premium Marketplace, which covers connected TV, online video, and display ads in an attempt to bring greater transparency to the marketplace, reducing opportunities for fraud and inventory misrepresentation in the media supply chain.
- Of the 60 Super Bowl advertisers spending \$7 million per 30-second spot, **Stagwell’s agencies** accounted for 10% of the work, namely 72andSunny for the NFL (Ranked #8 in the USA Today Ad Meter); Forsman & Bodenfors for Polestar; Doner for Cue Health; and Anomaly for Meta, Vroom, Diageo, and Expedia.
- Lender **Rocket Mortgage’s** 60-second spot, “Barbie Dreamhouse,” won the coveted top spot on the USA Today Ad Meter, which ranks viewer preferences. The ad was produced by Chicago-based agency Highdive.
- Ads by major brands including Innocent Drinks, Oatly, Hyundai, and Shell have been ruled “**greenwashing**” by the Advertising Standards Authority, based on misleading environmental claims.
- The **Boss Beauties** NFT collection, which contains 10,000 portraits of independent and diverse women, launched in September and sold out in 90 minutes. The women-led global initiative generated 14,500 ETH in trading volume, or nearly \$45 million.



- **Dove** partnered with Progressive to “insure” against hair disasters. #HairFails on TikTok exceeded 1 billion views. The two brands offered a chance to win a gift card (“Hair Assurance”) to go toward correcting any home hair mishaps.
- **Microsoft** removed more than 3 billion ads and banned nearly 400,000 websites from its network in 2021. The company also suspended 270,000 accounts for suspected malicious intent such as safety concerns, fake celebrity-endorsed investment ads, policy violations, or trademark infringements.
- Tech giant **Google** blocked 3.4 billion ads and suspended 5.6 million accounts in 2021, a significant increase over past years, to prevent abuse and provide safer services. The firm blocked or restricted ads from 1.7 billion publisher pages and 63,000 publisher sites, the vast majority of which (1.27 billion) contained sexual content.
- Matt Davies and Pieter-Paul von Weiler (BetterBriefs) and Mark Ritson, in partnership with the Institute of Practitioners in Advertising, launched a best-practice guide called “**The Best Way for a Client to Brief an Agency.**”
- The Association of National Advertisers released its first-ever guidelines (and metrics) for **measuring influencer marketing**, developed in collaboration with agencies and major platforms and endorsed by the Media Rating Council.
- **General Motors** announced the privacy-compliant, anonymized matching of GM’s first-party database and custom audiences of car buyers at various stages in the decision-making process with NBCU’s first-party data and custom audiences. This effectively makes GM the first brand marketer to integrate with NBCUnified, the first-party data and identity platform of NBCUniversal’s network of TV, streaming and digital properties.
- Per Triple Whale, **TikTok** is ranked as the most valuable platform for direct-to-consumer advertisers (reaching \$30 million in revenue in the second quarter of 2022), surpassing Facebook.
- 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.
- Per **Buffer**, Meta’s Facebook has 2.9 billion monthly active users; YouTube, 2.2 billion; Instagram, 2 billion; and TikTok, 1 billion.
- 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.

## Metaverse efforts

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- **National Research Group** released its “For Meta or For Worse: The Promise and Perils of the Metaverse.” Per the report, 31% of those surveyed say the metaverse will radically change how they engage with the digital world. One in three consumers would consider buying other metaverse-related gifts.
- Per McCann and Gartner, 2 billion people a day will spend at least an hour in the **metaverse by 2026**, with the main activities revolving around socializing, being entertained, shopping, and learning. The metaverse marketplace is expected to reach \$200 billion by that time. Brands are aggressively experimenting with good success. For example, Nike claims that 7 million people have visited Nikeland, its metaverse store, since it opened months ago.
- Agencies such as Accenture’s Nth Floor and WPP’s Metaverse Foundry are building **dedicated metaverse practices** to serve brand advertisers. They learn by practicing what they preach: Accenture launched Nth Floor as a virtual campus for its 700,000 employees worldwide.
- Per Ad Age, agencies such as Accenture, Wunderman Thompson, R/GA, VCCP, Media.Monks, Virtue, Mediahub, and Havas have built **metaverse offices** using various platforms—Roblox, Decentraland, Microsoft AltspaceVR, The Sandbox, and Horizon Worlds. The metaverse offices are used for onboarding new employees, facilitating training and company meetings, sharing and collaborating, holding conferences/ events, creating client demos, and building and monetizing creations (e.g., avatars, NFT collectibles).
- **Wunderman Thompson** opened a metaverse space within the B2B metaverse platform Odyssey, featuring retail, gaming, conferencing, and “inspiration kiosks,” which drove 11,300 unique visitors, 4,300 hours streamed and 74 million impressions.
- Other innovative concepts at **Cannes Lions**: McCann unveiled “MWverse,” a virtual gallery that housed the agency’s most memorable campaigns of the year and is used for client meetings. Meta re-created the French Riviera in a world called “Cloud Island.”





## Noteworthy quotes

- » “Stop blaming clients for bad work. Everyone in the business always says, ‘clients get the work they deserve.’ I call bullshit on that.”  
—Rob Lenois, Chief Creative Officer, **VaynerMedia**
- » “The pandemic has given us the license to innovate and find bold ways of working that support people in the flow of work, look out for their well-being, and can tap into human creativity.” —Bret Starr, CEO, Co-Founder and Partner, **The Starr Conspiracy**
- » “The more we can include talent with different experiences and stories, the more our industry will flourish.” —Kate Higgins, Chief Growth Officer, **Erich and Kallman**
- » “Words matter. So, let’s not devalue our hard work and powerful ideas anymore. Join me in rewriting the marketing vocabulary. Cut the word ‘tactics’ from your vernacular.” —Ronald Ng, Global Chief Creative Officer, **MRM**
- » “The renaissance rebirth of the advertising industry, the agency world, and the media partners world is around growth, that is, purpose-driven growth that feels like it’s meaningful material against important causes.” —Kirk McDonald, CEO, North America, **GroupM**
- » “Clients often have as limited access to their upper management as the agency, which means creativity dies in an endless cycle of second-guessing.” —M.T. Fletcher, Columnist, **Ad Age**
- » “Marketing—our sole reason for being is to drive growth of the business.” —Carla Hassan, CMO, **JP Morgan Chase**
- » “Marketing plans used to change once a year. Now, once a week is too slow.” —Matthew Lieberman, CMO, **PwC**
- » “Good ideas are like pop-up books; they get dimensional right before your eyes.” —Atit Shah, Chief Creative Officer, **Digitas North America**
- » “Agencies don’t wave magic wands, and experimentation and optimization are a crucial operational aspect of digital-first marketing.” —Mandy Dhaliwal, CMO, **Boomi**
- » “The metaverse provides a wealth of new media and new opportunities for the communications sector and for brands.” —Yannick Bolloré, Chairman and CEO, **Havas Group**
- » “Complexity quickly turns to chaos when you have a stack of unintegrated, mismatched tools, without much shared infrastructure across them.” —Scott Brinker, Editor, Chiefmartec.com and VP Platform Ecosystem, **HubSpot**

- » “‘No’ places a value on your work. ‘No’ helps you avoid burnout. ‘No’ sets relationship terms grounded in mutual respect.”  
—Kerry McKibbin, President and Partner, **Mischief @ No Fixed Address**
- » “A creative presentation should feel like the beginning, not the end.”  
—Melissa Wildermuth, Global Creative Director, **General Mills**
- » “This is part of the partnership pledge. Client-developed scopes of work have not worked; it takes a partnership to identify and settle on the right programs.” —Michael Farmer, Chairman/CEO, **Farmer & Company LLC**
- » “I like to be a shoemaker that has shoes.” —Mark Penn, CEO and Chairman, **Stagwell**
- » “Leaders must stop overpromising and underdelivering. They must establish boundaries from the start and only take on clients willing to honor those boundaries.” —Nick Chasinov, Founder and CEO, **Teknicks**
- » “We think it [the metaverse] allows almost limitless creative freedom for both users and brands.” —Stéphane Guerry, President, **Havas Sports & Entertainment**
- » “We didn’t announce we have a metaverse team, because that would be like announcing you have internet teams.” —Media Ridha, Executive Producer, **Media.Monks**
- » “It’s dangerous to try and predict what that future will look like. Crystal ball gazing is not usually a robust strategy.” —Jonny Shaw, Chief Strategy Officer, **VCCP New York**
- » “I love the idea of having project-based partnerships, but when you do that, you always get variances of the brand tone and the brand point of view versus one singular crystallized, consistent POV.” —Nick Reely, VP of Marketing, **Pabst Blue Ribbon**
- » “If you can really seize a cultural moment and jump into the conversation, then your brand becomes the conversation and I think that’s something that has been a real privilege to be a part of.”  
—Ryan Reynolds, Chief Creative Officer, **MNTN**
- » “Asking clients for insights is one thing. Doing something with those insights is another.” —Jeff Meade, Founder and CEO, **MEADE**
- » “Agencies develop powerful, bold ideas and plans, and rely on partnership with clients to embrace opportunities, as well as the associated risks, to innovate and explore creative solutions to business challenges that help build brands and companies that drive revenue growth.” —Marla Kaplowitz, President and CEO, **4A’s**
- » “No matter what subject is being addressed—the category, the product, or the audience—a layperson should be able to read any brief or receive any pitch and understand it.” —Sang’ona Oriedo, VP of Marketing, **iRhythm Technologies**



- » “The work needs to inspire, connect and provoke to feel relevant.”  
—Caitlin Ryan, VP, Meta and Regional Creative Director, EMEA, **Creative Shop**
- » “I’m trying to take the creativity, which is about ambition and understanding, and spread it to more places.” —David Droga, CEO, Accenture Song
- » “If you ever see Ford Motor Company doing a Super Bowl ad on our electric vehicle, sell the stock.” —Jim Farley, CEO, **Ford**
- » “At Target, we look at supplier diversity goals as an enterprise business goal. This isn’t just a supplier diversity team goal. It’s not just a procurement goal. It is a goal across the entire enterprise.”  
—Karen Tobler, Supplier Diversity Lead, **Target**

- » “Digitization is changing how consumers live, play and shop and is therefore reshaping our industry at speed.” —Luis Di Como, Executive VP Global Media, **Unilever**
- » “Stop wondering what clients really think about your business and start getting the scoop directly from them.” —Jeff Meade, Founder and CEO, **MEADE**
- » “New business is a game of inches. If we’re doing our job right, you’re all worthy candidates.” —Duffy Humbert, Senior Partner, **Select Resources International**

NEW ARTICLE

# Looking for better relationships?

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As seen on Forbes.com, check out one of our latest articles, “**Why Brand Advertisers and Agencies Must Ask The Right Questions to Build Better Partnerships**”: When brand advertisers ask better questions about their work relationship with agencies, performance soars and the partnership strengthens.



- » “As the technology and marketing industries undergo a profound transformation in an increasingly fragmented digital ecosystem, marketing needs to adapt and modernize as we navigate this new environment.” —Gina Qiao, SVP and Chief Strategy and Marketing Officer, **Lenovo**
- » “When we’re developing campaigns, we have business growth objectives to meet. The closest people to the business know how to translate that into a great brief. That’s what [people on our internal media team] do.” —Brigitte King, Chief Digital Officer, **Colgate-Palmolive**
- » “A brand co-owned and co-authored by lots of people, that’s cool.” —Neal Arthur, Global CEO, **Wieden+Kennedy New York**
- » “Writing bad briefs is the most expensive way to write advertising.” —Sir John Hegarty, Co-Founder and Creative Director, **The Garage Soho**
- » “There is unlimited potential to transform any business, but we need to transform the way we approach creativity. Stop asking where an idea came from, it can come from anywhere. It’s about collaboration.” —Ronald Ng, Global Chief Creative Officer, **MRM**
- » “Winning a Cannes Lion made me a climate criminal. So, I crashed the stage to hand it back.” —Gustav Martner, Head of Creative (Nordics), **Greenpeace**
- » “Media technology has run its course. Content consumption is flat. So, the quality is becoming the source of competitive advantage.” —Andrew Swinand, CEO, **Leo Burnett Group and Publicis Groupe Creative and Production US**
- » “We have a super-power that no other industry in the world has: creativity for growth.” —Marc Pritchard, Chief Brand Officer, **Procter & Gamble**
- » “The center of power shifted away from agencies and towards clients long ago, so that their relationships today are much more like customer-vendor or master-slave relationships than true partnerships.” —Michael Farmer, Chairman and CEO, **Farmer & Company LLC**
- » “In Web3, this will become our connected wallet and the NFTs we have in our wallet will be important not only for what sort of utility they provide, but what they say about us.” —Eric Jacobs, Chief Innovation Officer, **VaynerMedia**
- » “A clear majority of both brand and agency leaders feeling increasingly disenfranchised with the pitch process as it stands today.” —Charlie Carpenter, CEO, **Creativebrief**
- » “After years of procurement separating media from creative, the demands of the digital world are bringing them together again, and we are responding to this trend.” —Mark Penn, CEO, **Stagwell**

- » “Our primary role is no longer just helping with growth—it’s about growth and relevance.” —David Droga, CEO, **Accenture Song**
- » “We are living in a world where creativity is needed more than ever.” —Devika Bulchandani, Global CEO, **Ogilvy**
- » “Creatives want to be recognized and valued as much as clients desire to be heard. Client world and agency world may be different, but in the trenches, you are one team.” —David Bates, CEO, **Bokeh**
- » “‘Creative + Media + Commerce’—the new equation for modern marketing—is simple but executing against it is complex.” —Mark Penn, Chairman and CEO, **Stagwell**
- » “The best clients have a curiosity about and respect for their agency’s craft that arises from the individuals they work with.” —David Bates, CEO, **Bokeh**
- » “We as creatives are the size of our ideas and they are a reflection of what we are and our beliefs.” —Angélica Portillo, Creative Director, **Casanova//McCann**
- » “Everyone can have a great idea but making that idea a reality is the hardest part. A simple and well-crafted idea can be hard to find, but it also can be the most rewarding one.” —Daniel Correa, Creative Director, **Alma**
- » “The reality is that better data won’t increase marketing analytics’ decision influence alone. CMOs must address the real challenges—cognitive biases and the need for a data-informed culture.” —Joseph Enever, Senior Research Director, Marketing Practice, **Gartner**
- » “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**
- » “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**

**KANTATA**

# How to Get Optimal Value From the Agency / Client Relationship

with **Bruno Galpois**  
Co-Founder and Principal at Agency Mania Solutions

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**THE PROFESSIONAL SERVICES PURSUIT**

episode 28

Check out **Kantata’s podcast session** in which Bruno Galpois 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.



# PHARMA AGENCY FAMILY TREE

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# Financials

Driving efficient use  
of resources



### Year-end summary

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#### February 2022 | Volume 61

M&A is in full swing with bold moves from big advertising players. Microsoft's acquisition of video games giant Activision for \$68.7 billion, the largest deal in gaming history, will impact, without a doubt, the advertising world as Microsoft continues to grow its \$10 billion advertising business (competing with Facebook's parent company, Meta, and Google) while going after a larger share of the gaming business. Sleeping ad giant, no more. Microsoft will gain internal game development studios, along with additional publishing and esports production capabilities, which will push for greater innovation as gaming and advertising increasingly blend.

#### March 2022 | Volume 62

Holding companies also posted remarkable 2021 financial performance across the board. Revenue was up, organic growth was as well, and operating margins improved. All of the work they did to streamline operations and reduce costs also paid off. Spend also increased, especially in commerce, digital, and data. Amazon's performance as it relates to its advertising business (now \$31 billion) is also worth mentioning. That was then and this is now. We are dealing with another major storm. What will be the lasting impact of inflation and current world events on agencies and their financials?

#### April 2022 | Volume 63

While inflation and economic uncertainty are sources of concern for long-term growth, holding companies started off with a strong Q1 2022 performance, with double-digit organic growth, ranging from 17% for Publicis Groupe to 11.9% for Omnicom. Holding companies seem cautiously optimistic that advertising spend will remain strong. They are investing in talent and making strategic acquisitions to prepare for a predominantly digital and data-driven future.

#### June 2022 | Volume 64

Despite the war in Ukraine, inflation and interest rates on the rise, and the lasting impact of COVID and supply chain issues on global economies (especially China), brands appear confident for now. They continue to invest in brand experiences informed by data and analytics as well as marketing technology, CRM and other insight-driven disciplines. As a result, major holding companies had a strong 2021 and solid first quarters in 2022 as evidenced by their earnings and reported organic growth and profitability. Healthy agencies always equal stronger client partnerships. As e-commerce growth adds greater complexity to the marketing and advertising ecosystem, many agencies are shifting their business to higher margin hybrid agency/consultancy to tackle these new opportunities and support advertisers.

#### August 2022 | Volume 65

Although there are concerns that the industry may experience a significant slowdown, advertising spend historically has risen during recessions (1973-1975, 1980, and 1981-1982), which might explain why advertisers and agencies seem confident. Major media groups like GroupM are forecasting 2023 ad revenue to increase in the US by 6%, a slowdown from 2022 (9%) but still encouraging. Private equity firms, in addition to consultancies, tech companies, and global holding networks, continue to acquire aggressively, reflected in a rising number of M&A deals, especially data- and tech-driven business opportunities. The increasing focus on being customer-first is also driving M&A interest across digital customer experience (CX) and digital transformation.

#### October 2022 | Volume 66

Budgets are under heavy scrutiny, with marketers required to justify investment. In light of global economic trends, there is indication that some advertisers are considering budget cuts, but the data does not yet seem conclusive as many brands are leveraging this opportunity to grow their business. Digital advertising is on the rise. M&A activity is high, with a focus on data and digital-first companies that have expertise in analytics and e-commerce solutions.

#### December 2022 | Volume 67

After many big tech stocks suffered a brutal sell-off 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.



## Industry stats and projections

### Worldwide advertising

- Spending for the world's **100 biggest advertisers** fell 7.1% to \$278 billion in 2020. Among the top 100 advertisers, 70 cut spending in 2020. But 27 advertisers increased their spending in 2021. Procter & Gamble Co. was #1 in the Ad Age World's Largest Advertisers ranking (with a 7.3% increase to \$11.5 billion in the fiscal year ended June 2021), followed closely by Amazon (\$10.9 billion).
- Per dentsu, **worldwide ad spend** is to increase by 9.2% in 2022, after a remarkable 17% increase in 2021. The Big 4 agency holding companies' (dentsu, GroupM, Magna, Zenith) consensus for worldwide ad spending is a projected increase of 21.4% in 2021 and 12.8% for 2022.
- Per **World Federation of Advertisers** (WFA), three-quarters of top brands have reallocated, reduced, or cut spending entirely in Russia in a show of support for Ukraine.
- Per Ad Age, the **top 10 biggest global advertisers** based on 2021 spend:
 

1. Procter & Gamble	7. Nestlé
2. Amazon	8. Comcast
3. L'Oréal	9. LVMH Moët Hennessy Louis Vuitton
4. Samsung Electronics	10. Alphabet (Google)
5. Alibaba Group Holding	
6. Unilever	
- Per the World Federation of Advertisers (WFA) and Ebiquity, 40% of the **world's biggest advertisers** are planning to keep budgets flat in 2023, 30% plan to cut ad budgets, while another 30% plan to increase them. 21% of North America brands plan to cut their ad budgets, with 9% expecting cuts of more than 10%. 42% expect budget increases in digital and decreases in offline media such as TV, radio, print and outdoor.
- 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.
- 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.

### US advertising

- Per Winterberry Group, **US marketers** in 2021 spent \$436.3 billion, a 21.6% increase YOY and the strongest year for marketing in the last decade. They expect continued growth of 11.8% in 2022 to \$487.8 billion.
- Magna reduced its **ad spending growth expectation** for 2022 in the US from 12.6% to 11.5% due to the economic uncertainty and geopolitical crisis resulting from the Russian invasion of Ukraine. Yet ad revenue is expected to pass the \$300 billion milestone for the first time. Magna's final 2021 estimate is that advertising revenues grew by a record 25% in the US to reach \$287 billion, with significant growth notably in search (42%), social (36%), audio (24%), and video (12%).
- Per **Ad Age's Agency Report 2022**, US agency revenue in 2021 grew at its fastest pace since the dot-com bubble of 2000. US revenue for agencies from all disciplines jumped 13.5%. Digital share of revenue reached 64%. The average forecast for 2022 worldwide growth for the top five agency holding companies (WPP, Omnicom, Publicis, Interpublic, Dentsu): 4.8% to 5.1% (and organic growth between 9.6% and 11.5% worldwide). US revenue for agencies from all disciplines, excluding the five big consultancies, rose 11.8% in 2021.
- Per the Association of National Advertisers and Juniper Research, **ad fraud** (e.g., app install farms, SDK spoofing, click spam and ad stacking, click injection) costs advertisers \$51 million a day and will reach \$120 billion in wasted media buys in 2022, up 21% YOY.
- Per Magna, **digital fraud** accounts for 62% of ad spend worldwide. Per DoubleVerify, the number of fraud schemes globally increased 70% YOY. Articles that perpetuate disinformation generated six times more likes, shares and interactions on Facebook versus stories from trusted news sources.
- Per IHS Markit for The Advertising Coalition, **advertising** contributed to \$7.1 trillion in sales in 2021 and supported 28.5 million American jobs. It is projected to drive \$9.5 trillion in sales by 2026, supporting 31.9 million jobs. The impact of advertising represented 18.5% of US gross domestic product.
- Per **Ad Age's Agency Report 2022**, US agency revenue in 2021 grew at its fastest pace since the dot-com bubble of 2000: US revenue for agencies from all disciplines jumped 13.5% in 2021. Digital share of revenue reached 64%. For five top agency holding companies (WPP, Omnicom, Publicis, Interpublic, Dentsu), worldwide growth in 2022 is forecast to grow 4.8% to 5.1% (with organic growth between 9.6% and 11.5% worldwide). In 2021, US revenue for agencies from all disciplines, excluding the four big consultancies, rose 11.8%. Revenue at Accenture Interactive (now Song) increased 27% in the US and 17.4% worldwide.
- Per Ad Age, the **top 10 biggest US advertisers** based on 2021 spend:
 

1. Amazon	6. Alphabet (Google)
2. Comcast	7. Warner Bros Discovery
3. Procter & Gamble	8. Verizon Communications
4. American Express	9. Walmart
5. Walt Disney	10. Charter Communications





- Per Ad Age, the **top 10 most advertised brands in the US** based on 2021 measured-media ad spending:

- |                |                    |
|----------------|--------------------|
| 1. Geico       | 6. Apple           |
| 2. Amazon      | 7. Verizon         |
| 3. T-Mobile    | 8. AT&T            |
| 4. Progressive | 9. Allstate        |
| 5. Google      | 10. Liberty Mutual |

- Per Interpublic Group of Cos.' Magna, the **US advertising industry** is expected to exceed \$300 billion, reflecting nationwide ad revenues increasing 9.8% YOY in 2022, fueled by the Winter Olympics, FIFA World Cup and US midterm elections.



A strong argument can be that technology will free up resources to do core procurement responsibilities—not other (non-procurement) responsibilities, but more strategic/less tactical activities.”

John Proverbs  
Head of Procurement, KLA



## Digital advertising

- Per MediaRadar, **podcast advertising spend** in the US jumped 21% in 2021, reaching \$590 million. The top 10 podcast advertisers accounted for 15.9% of total 2021 podcast spend. Mid-roll ads accounted for 55% of all ads run, followed by pre-roll (26%) and post-roll ads (19%). Most ads ran 30 seconds in length (42%).
- Per Matthew Lieberman, CMO at PwC, “**MarTech** is booming—it’s now worth nearly \$350 billion and represents more than a quarter of marketing budgets.”
- Per Juniper Research, **digital advertising spend lost to fraud** will reach \$68 billion globally in 2022 vs. \$59 billion in 2021. Five countries account for 60% of ad fraud. The most affected are US, Japan, China, South Korea, and UK.

- Per the Interactive Advertising Bureau and PricewaterhouseCoopers, **digital ad revenue** in the US rose 35%, to \$189 billion, in 2021, specifically in digital audio and video, as brands spent more to reach consumers during COVID.
- Per the Interactive Advertising Bureau and consulting firm PwC, **US podcast ad revenue** is estimated to grow 47% to \$2.1 billion in 2022 and 45% to \$3.1 billion in 2023, and 37% to \$4.2 billion by 2024. Automated advertising messaging (through dynamically inserted advertising) now accounts for 84% of podcast advertising.
- Per Gartner, **digital channels** are capturing 56% of this year’s marketing budgets, with social media fueling much of that growth. Marketing budgets are also up, making up 9.5% of companies’ revenue in 2022, up from 6.4% in 2021. The majority (58%) of CMOs reported that their teams lack the capabilities required to deliver their strategy.
- Per the Interactive Advertising Bureau, **connected TV ad spend** is expected to grow 39% this year to \$21.2 billion, following a 57% YOY increase in 2021.
- Per IAB, **digital advertising** increased by 35% to reach \$189 billion in 2021. Podcast ad revenue increased by 19% YOY in 2020, reaching \$842 million.
- Per Allied Market Research, the **global in-game ad market** (comprising static ads, dynamic ads and advergames) reached \$6.8 billion in 2021 and is forecast to hit \$17.6 billion by 2030, fueled by the use of smartphones and other portable devices.
- 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.

## Media, programmatic, and social

- Consulting firm **PwC** estimates more than 70% of a typical advertiser’s budget does not result in media that reaches the end consumer. And **worldwide programmatic** ad spending is expected to exceed \$200 billion this year.
- Per Accenture, **social commerce**, defined as transactions (across category but mostly clothing, electronics, and home decor) that take place entirely within the context of a social-media platform, will reach \$1.2 trillion by 2025. 3.5 billion people used social media in 2021, spending on average two and a half hours engaged with it per day.
- The Federal Trade Commission (FTC) reported that in 2021, consumers lost a record \$770 million to **social media scams** fueled by crypto currency and ecommerce technologies, 19 times what that figure was in 2017. Facebook and Instagram were listed as the two top platforms, representing 9 out of 10 reported scams.



- **Crypto collectibles (NFTs)** are on the rise with brands rushing to experiment with those one-of-a-kind, intrinsically and completely unreproducible assets. Recent examples of successful NFT transactions: “Everydays: The First 5000 Days” digital artwork, a collage of 5000 digital images, was created by artist Beeple (aka Mike Winkelmann) and sold for a record \$69.3 million by Singapore-based programmer and crypto currency investor Vignesh Sundaesan. Under the transaction, Sundaesan receives rights to display the artwork, but does not receive copyright.
- The Association of National Advertisers (ANA) launched a probe of **programmatic digital media buying**, recruiting investigative firm Kroll alongside consulting firm PwC and industry body TAG TrustNet.
- Per Insider Intelligence, **TikTok ad revenue** is expected to triple to \$11.64 billion in 2022 (compared with \$3.88 billion in 2020), surpassing the 2022 forecast for Twitter (\$5.58 billion) and Snapchat (\$4.86 billion). Hashtag #TikTokMadeMeBuyIt has 10.7 billion views.
- Per COMvergence, most of **media new business** went to only 16 agencies, representing over \$3 billion of the \$4.8 billion of media spend up for grabs, led by Wieden+Kennedy (\$420 million—FanDuel, Chime, Vrbo, goPuff, Impossible Foods, and Danone [Evian]) and TBWA (\$340 million—DirecTV, Discover, PepsiCo [Lay’s], Behr Paint, Royal Philips, Schwan’s Foods, and Palo Alto Networks).
- Per GroupM, **artificial intelligence (AI)-enabled media** will account for \$370 billion in ad spending in 2022 and is expected to reach \$1.3 trillion—or more than 90% of all ad spending—by 2032. AI encompasses machine learning, neural networks, computer vision, natural language processing, and intelligent process automation.
- The 4A’s published a whitepaper titled “**The Rocky Path Agencies Are Forced to Traverse**,” which explains how to reduce the complexity of programmatic trading (aka “supply path optimization”) and the issues referred to as “black box programmatic technologies” (e.g., click-fraud, frequency-capping, misrepresentation of inventory).
- Per auditors AuditStar and Cortex Media, despite US consumer price inflation nearing double-digit rates, **advertising cost inflation across media** is expected to rise only 6.7% this year and is projected to moderate to 5.1% next year. In the US, the only medium projected to inflate at a higher rate in 2023 is CTV (connected TV).
- Per McKinsey, **annual global spending related to the metaverse** could reach \$5 trillion by 2030. E-commerce in the metaverse is expected to reach \$2 trillion to \$2.6 trillion of the total, while virtual advertising endeavors could make up \$144 billion to \$206 billion.
- Per Insider Intelligence, advertisers will spend \$774.8 million on TikTok **influencer marketing in the US in 2022**, more than Facebook (\$739 million) but less than YouTube (\$948 million) and far less than Instagram (\$2.2 billion). Total influencer marketing spend is expected to reach \$5 billion in the US this year.

- Per Nielsen’s **2022 ROI Report**, media spend needs to be between 1-9% of revenue to stay competitive, and increasing awareness and consideration by one point drives a 1% increase in sales and a 1% decrease short-term cost per acquisition.
- Per WPP’s GroupM, **global retail media spending** will reach \$101 billion in 2022, a 15% YOY increase. Retail media ad revenue represented 18% of global digital advertising revenue last year, and 11% of total global ad revenue.
- Per Insider Intelligence, **influencer marketing spending** will reach \$6 billion in 2023. Instagram would account for more than 40% of brand budgets. Spending on TikTok influencers grew fivefold in the past two years and is expected to surpass Facebook this year and YouTube within two years.
- 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.

### Super Bowl, World Cup, recession, and political

- Per Standard Media Index’s (SMI) Forward Bookings intelligence, **Super Bowl LVI 30-second unit ad rates** were up 5% YOY at \$4.8 million per spot on average.
- Per iSpot.tv, **viewing of Super Bowl TV commercials before the game** is 1.33 billion from 1,862 airings—105 creatives from 45 brands. Per Tubular Labs, the most-viewed TV commercials were from Nissan, Pepsi, Bud Light, Amazon, and Frito-Lay. Best-performing spot was Nissan’s “Thrill Driver” teaser/commercial with a total of 37.3 million impressions.
- Per Fox Television Network, the **next Super Bowl** will see 30-second commercial time reaching \$7 million for many national TV ads (previously \$6.5 million), with 95% of the inventory in the big game already sold as of September. Twenty-eight new sponsors will be on board totaling \$100 million.
- **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.
- 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.

## Other/miscellaneous

- Per WARC (World Advertising Research Center), the **IRL** (acronym for “in real life” which includes out-of-home and cinema advertising) ad spend will reach \$44.4 billion in 2022.
- Per Ciesco, **technology, digital and media M&A deal** data in Q1 2022 shows great resistance against geopolitical and economic headwinds, as deal volume increased 17% YOY. There were 500 transactions in the sector. 40% of the deals in Q1 involved a private equity buyer. The US was the largest market for deal activity (48%) followed by Western Europe (23%) and the UK (13%).
- The **suspension of activities in Russia** by agencies because of the war in Ukraine is appearing to have limited financial impact on the firms. For example, WPP reported that Russia represented 0.6% of revenue less pass-through costs in 2021.
- Per Valuates, **marketing automation** is expected to reach \$4.71 billion by 2028, up from \$2.75 billion in 2021.
- Cisco 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.

## Key client budget moves

- Per Omnicom’s annual report, the largest **Omnicom client** represented 3.2% of revenue in 2021, and the 100 largest clients represented approximately 54% of the holding company’s revenue.
- **Ford Motor Company** agreed to pay \$19.2 million in a multistate settlement over claims of false advertising about the fuel economy and payload capacity of its vehicles.
- **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.
- 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.

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Data is listed chronologically in most instances, and alphabetically in others.

## Digital giants

- **Microsoft** reported over \$10 billion in advertising revenue last year, driven by ads on its search engine Bing and placements across its network, including the Microsoft Audience Network. The Microsoft Advertising audience reached one billion people globally (Bing, Outlook.com, AOL, Yahoo, MSN.com, etc.) as of March 2021.
- **Amazon** reported that its annual advertising revenue reached \$31 billion for 2021, mostly fueled by demand for sponsored ads, streaming video, and measurement. Although it represents only 7% of total revenue in Q4 2021, it positions Amazon as one of the Big 3 ad tech giants with Google and Meta.



- **Alphabet** had a record-breaking \$257 billion in revenue for 2021, fueled by a 32.5% increase in ad sales, driven by Google and YouTube. **Google’s** advertising revenue rose 32% to about \$75 billion in the fourth quarter of 2021.
- **Amazon** acquired MGM for \$8.5 billion, with 4,000 film titles, 17,000 TV episodes, 180 Academy Awards and 100 Emmy Awards now part of Amazon Prime Video and Amazon Studios.
- **Twitter** was fined \$150 million after the Federal Trade Commission and Department of Justice found that the firm illegally harnessed phone numbers and email addresses to allow advertisers to target advertisements.
- **Amazon** reported first quarter ad revenue of \$7.877 billion, an increase of 23.4% YOY, on par with Google’s ad revenue performance (also 23%). Amazon overall net sales increased 7% to \$116.4 billion.
- **Amazon** totaled \$10.4 billion in US ad spending in 2021, well above Comcast (\$6 billion) and P&G (\$5.1 billion).



- **Amazon's** advertising services generated \$8.76 billion in revenue in Q2, an 18% increase YOY. Sales increased 7.2% to \$121.2 billion in the period ended June 30, closing the gap with its ad giant competitor, Google.
- **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 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-on-demand revenues of \$127 billion by 2.6 times, and TV advertising's \$159 billion by 2 times.
- 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.

## Holding companies' financial results

### Accenture

- Per Ad Age, **Accenture Song's** fiscal 2021 US revenue rose 27% to \$5.9 billion, double the overall US growth rate of agencies. The world's fourth-largest agency company's worldwide revenue increased 17% to \$12.5 billion in the fiscal year ended August 2021 and is expected to reach \$14 billion in 2022. Accenture Song's parent company had fiscal 2021 worldwide revenue of \$50.5 billion.

### Dentsu

- **Dentsu** reported revenue of JPY 976.5 billion (YoY +16.9%) or 19.2% at Dentsu Japan Network, and 15.4% at Dentsu International. Group organic growth was 13.1%. Dentsu Japan Network reported Q4 FY2021 organic growth of 17.3% and Dentsu International reported organic growth of 12.1%, led by the cyclical recovery in media as well as increased client spend on digital transformation initiatives. Customer Transformation & Technology grew in double digits, led mainly by Dentsu Digital in Japan and Merkle in the international business. Cloud solutions, commerce & experience, and identity & analytics remained the fastest growth areas.
- **Dentsu Group** reported \$258 million in net revenue in Q1 2022 and 9.1% organic growth (13.4% in the Americas), a record first-quarter performance in net revenues and operating profit, which increased by 22% (driven by the transformation and simplification the group went through in the past year). Operating margin reached 21.2%. Customer Transformation & Technology reached 31.5% of net revenues, growing 22.5%.

- **Dentsu Group** reported \$1.9 billion (260,079 million yen) for the second quarter with organic growth of 8.2%, Dentsu Japan Network, 7.9%, and Dentsu International, 8.4%, as clients continue to invest in their brands, supported by technology, data, and digital solutions to enhance their customer strategies. Customer Transformation & Technology grew 22.5%, reaching 32.3% of Group revenues, 27.5% at Dentsu Japan Network, and 35.7% at Dentsu International. The operating margin increased to 13.9%. The Group has completed two acquisitions to reach a goal of 50% of revenues generated by Customer Transformation & Technology. Pexlify, a Dublin-based Salesforce consultancy, and Extentia, a global consultancy, deliver solutions across mobile, cloud, and experience. The group expects 4% to 5% organic growth with a 17.7% operating margin for the year.
- **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.

### Havas

- **Havas** (which is part of global entertainment, media, and marketing company Vivendi) reported 2021 revenue of €2.34 billion (\$2.6 billion), up 9.2% YOY (Vivendi's reported all-up revenue increased 10.4% to €9.6 billion or \$10.6 billion). Organic revenue growth was 10.4%, fueled by its Creative, Media and Health Communications divisions. Key wins included Volkswagen and Telecom Italia (creative), IAG airline group and Unilever (media), and AbbVie and Novartis (healthcare).
- **Vivendi-owned Havas Group** reported revenue of 564 million euros (\$594 million) in Q1, up 18% with organic growth of 11.4%, fueled by its performance in Europe and North America and the success of Havas CX, its global customer experience network and e-commerce offering.
- **Vivendi-owned French holding company Havas Group** reported organic revenue growth of 11.5% for Q2. Net revenues were €642 million (\$652 million), up 21% for the period. Havas Group's H1 revenues of €1.26 billion were up 11.5% YOY. Profits rose 28% to €112 million (\$114 million) in H1. The firm acquired Tinkle (Spain and Portugal), Inviqa (UK and Germany), Search Laboratory (UK and US), Frontier (Australia), and Front Networks (China) in the first half of the year. Major account wins included Boehringer Ingelheim (media, US), Chewy (creative, Arnold Boston), and Amgen (Havas Health & You).
- **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%.





## Interpublic Group

- **Interpublic Group of Cos** reported revenue of \$10.24 billion for the year 2021, or \$9.11 billion net revenue, a 12.9% increase YOY. Organic revenue increased by 11.9% worldwide (LATAM at 22.8%). Q4 revenue was \$2.55 billion, up 11.6% YOY, fueled by new business wins by UM, McCann, MullenLowe, Deutsch LA, and R/GA. Operating income for the full year 2021 was \$1.44 billion. The operating margin rate was 16.8%, an increase YOY (13.5%). 27% of net revenue comes from healthcare, followed by tech & telco.
- **Interpublic Group** reported revenue of \$2.23 billion in Q1, an increase of 9.8% YOY. Organic net revenue increased by 11.5% (with organic growth of 12.2%, and globally at 10.2%). Staff cost ratio (total salaries and related expenses as a percentage of net revenue) increased to 70.2% (from 68.7% the year prior). Salaries and related expenses increased 12.3%. Expectation for adjusted EBITA margin is 16.6% for the full year. Key client wins included KFC (MullenLowe), Hershey's and Kellogg's NA (FCB), and Velocity Global (McCann).
- **Interpublic Group** reported revenue of \$2.38 billion, an increase of 4.7% from a year ago, with organic growth of 7.9%. It was a strong first half, notwithstanding general macroeconomic concerns. Second-quarter net income was \$229.6 million with a margin of 15.6% on net revenue. IPG had growth at all of its largest agencies, significantly outpaced by IPG Health, followed by strong growth at Mullen Lowe and FCB. Its Media, Data & Engagement Solutions segment—made up of Mediabrands, Acxiom, Kinesso, and IPG's digital and commerce specialist agencies, including MRM, R/GA and Huge—grew 6.2% organically. IPG's Specialized Communications & Experiential Solutions segment—IPG DXTRA and DXTRA Health, Weber Shandwick, Golin, Jack Morton, Momentum, and Octagon—saw 11.1% organic growth. IPG expects FY22 organic growth to exceed 6.5% and to deliver a 16.6% adjusted EBITDA margin for the 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.

## Omnicom

- **Omnicom Group** reported revenue was up 8.5% for the year 2021 to a strong \$14.3 billion with 10.2% organic growth. Operating profit margin was 16.1% and operating profit reached \$622.5 million in Q4. Organic growth in Q4 increased across disciplines: 7.4% for Advertising, 19.6% for Precision Marketing, 12.4% for Commerce & Brand Consulting, 56.7% for Experiential, 5.2% for Execution & Support, 4.4% for Public Relations and 4.5% for healthcare. Now strong of 70,000 people worldwide, the firm cut 5,000 jobs during the health crisis. Future acquisitions are expected in growth areas like precision marketing, data & analytics, ecommerce, and healthcare.

- **Omnicom** reported revenue of \$3.4 billion, a reduction of 0.5% YOY, with organic growth of 11.9% in Q1 2022 (9.1% increase in Advertising & Media, 20.3% Precision Marketing, 13.8% Commerce & Brand Consulting, 68.0% Experiential, 6.3% Execution & Support, 14.0% PR, and 7.7% Healthcare). Operating profit decreased \$112.4 million, or 24.2% YOY, to \$353 million. The operating profit margin of 10.4% decreased from 13.6%. The effect of the war in Ukraine and withdrawal of business led to \$113.4 million in charges, decreasing the operating margin by 3.3%. The group added capabilities to Omnicom Precision Marketing Group through the acquisition of TA Digital.
- **Omnicom** reported revenue of \$3.4 billion in Q1, a decrease of 0.5% YOY but showing strong organic revenue growth of 11.9%. Organic growth increased across all fundamental disciplines: 9.1% for Advertising & Media; 20.3%, Precision Marketing; 13.8%, Commerce & Brand Consulting; 68%, Experiential; 6.3%, Execution & Support; 14%, Public Relations; and 7.7%, Healthcare. Operating expenses reflect \$113.4 million in charges incurred in connection with the effects of the war in Ukraine. First-quarter net income fell 39.6% to \$173.8 million. The group acquired TA Digital in March.
- **Omnicom** reported revenue of \$3.5 billion in Q2, with organic growth of 11.3%. The operating profit was \$541 million, and the operating profit margin was 15.2%. Organic growth increased across all of Omnicom's fundamental disciplines: 8.2% for Advertising & Media, 15.8% for Public Relations, 21% for Precision Marketing, 9.2% for healthcare, 9.3% for Execution & Support, 11.2% for Commerce & Brand Consulting, and 36.6% for Experiential. The group acquired TCA, a full-service performance marketing agency, which is now part of Omnicom Media Group. The group formed partnerships in retail media and e-commerce (Walmart, Instacart, Amazon.com, Kroger).
- **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.

## Publicis Groupe

- **Publicis Groupe** reported revenue was up 8% for the year 2021 to a record €10.5 billion (\$11.9 billion) with organic growth of 10% versus 2020. Organic growth in 2022 is expected to be 4% to 5%. North America performed strongly. Key wins included Stellantis, Walmart, TD Bank, Facebook parent Meta, and an estimated 900 pieces of new business (or \$560 million). The firm realized double-digit growth by both data unit Epsilon and digital transformation division Publicis Sapient. The group increased its mergers and acquisitions budget to €400-€600 million, up from €300 million in 2021. The operating margin rate improved to 17.5%, up from 16.0% in 2020.



- **Publicis Groupe** reported net revenue of €2.8 billion (about \$3.05 billion) in Q1 2022, up 17.1% YOY with organic growth of 10.5% (vs 2.8% in Q1 2021). Organic growth was strongest in Europe (mostly from the UK and France) at 14.9%. Data unit Epsilon (+6.3%) and digital transformation division Publicis Sapient (+18.5%) were key performers. Major account wins last quarter included McDonald's (Media US), A-B InBev (Media Global), Pepsi (Media China), Siemens (Creative Global), LVMH, and KFC. 3,052 clients represented 91% of revenue. Publicis was named Holding Company of the Year in the 2022 Ad Age A-List.
- **Publicis Groupe** reported 2.8 billion euros (US\$2.9 billion) in Q1, up 17.1% YOY with organic growth of 10.5% (vs. 2.8% the year prior). Publicis Sapient experienced 18.5% organic growth. North America net revenue was up 16.1%, compared to Europe (18%) and APAC (20.3%). The group reported strong wins in new business (McDonald's, Singapore Tourism Board, Siemens, Etisalat, LVMH, Pepsi and more), driven by strength of the model combining data, creative, media and technology. The group acquired software engineering firm Tremend in March.
- **Publicis Groupe** reported 21% new revenue growth, including 10.3% organic revenue growth and a 21% increase in net revenue to €5.9 billion, or \$6.01 billion, for its second quarter. Organic revenue rose 10.4% in the first half of the year. Publicis Sapient and Epsilon grew by 19.1% and 13.7%, respectively. The operating margin rate notably increased by 17.3% YOY. The group is showing strong momentum with a shift of client investment toward data, technology, and digital business transformation.
- **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%.

## S4 Capital

- **S4 Capital** postponed issuing its fourth-quarter and full-year 2021 results for the second time due to its auditor, PwC, being delayed by COVID-related travel issues, prompting shares to lose significant value on the London Stock Exchange.
- **S4 Capital** reported revenue rose 70% in the first quarter, to £206.8 million (\$260 million), a 40.6% YOY increase for the same period fueled by new client business: Estée Lauder (working with S4 agency Decoded) and expanded remits with Amazon, PayPal, Netflix and Google. Net revenue was £171.1 million (\$215 million), an increase of 64.6%.

- **S4 Capital** reported \$424.8 million net revenue in H1, a 58% gain, with organic net revenue growth of 28%. The company's net loss widened to about \$93 million. Full-year guidance is net organic revenue growth of 25%.
- **S4 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).

## Stagwell

- **Stagwell** reported revenue of \$1.93 billion with organic growth (which excludes M&A and currency impact) of 14.5%. The group posted a 10.4% gain in net revenue in Q4, or \$520 million with organic growth of 11.3%. Creative and communications contributed nearly half of the firm's revenue (47%); digital transformation services (23%); performance, media, and data (21%); and consumer insights and strategy (9%). The firm expects organic net revenue growth of 18% to 22% and \$3.4 billion in revenue by 2025.
- **Stagwell** reported full-year organic revenue of \$1.93 billion, a 14.5% YOY increase, and fourth-quarter organic net revenue of \$519.7 million, or 11.3% growth. Expectations for net revenue growth are between 18% and 22% for 2022. 65% of revenue is to come from digital capabilities.
- **Stagwell** reported \$2 billion in revenue as well as a 51% increase in net revenue for 2021. The firm completed two major acquisitions: provider of end-to-end e-commerce services firm Brand New Galaxy and leading multicultural full-service marketing agency Dyversity Communications. In Q1 2022, new revenue reached \$526 million and net new business reached \$54 million with organic growth of 24% YOY. Notable business wins included Lenovo, TikTok, Equifax, Taco Bell, Hulu and The Ritz-Carlton. Digital revenue (digital transformation, performance media/data, consumer insights and strategy, and creative and communications) accounts for 56% of net revenue.
- **Stagwell** reported revenue of \$672.9 million in the second quarter, an increase of 221.1% YOY and YTD revenue of \$1,315.8 million, an increase of 236.7% YOY as the holding company plans to further mix its creative and media capabilities (creative agencies Crispin Porter + Bogusky, Forsman Bodenfors, The Observatory, and Vitro combined with Stagwell's media network). Organic net revenue grew 16% in Q2 and 19.1% YTD. Net income in Q2 was \$24.5 million. The group reported a 20% margin on net revenue. The holding company still predicts 18% to 22% net revenue organic growth in 2022.
- **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.

## WPP

- **WPP** reported that revenues totaled £10.4 billion (\$13.9 billion), up 6.5% versus a year ago. The group showed very strong growth driven by demand for digital services, ecommerce, and technology (now 38% of revenue) and the performance of GroupM (organic revenue rose by 16.1%). Operating margin was 14.4%. WPP continued its investments: creation of Choreograph; acquisitions including Sard Verbinen, Satalia, Cloud Commerce and Numerator (Kantar). \$8.7 billion of net new business won, including the global Coca-Cola account. Transformation program (property, procurement, simplification, shared services, and IT transformation) is on track with £245 million gross savings. Over £1 billion total cash returns to shareholders through share buybacks and dividends.
- **WPP** reported working with 317 of the Fortune Global 500, reporting \$8.7 billion net new billings in 2021, with a strong 14.4% headline operating margin, £50.7 billion (\$65.3 billion) in total billings (+14.4%), and £12.8 billion (\$16.5 billion) in revenue (+13.3%), growing at its fastest rate in more than 20 years.
- **WPP** reported Q1 revenue of £3 billion (\$3.7 billion), up 6.7% YOY. The firm reported \$1.8 billion in net new business, including Mars, JDE Peet's and Sky. Continued strong performance at GroupM: data, digital media, new business. Very strong growth in India and Brazil. PR delivered sustained high growth and reported broad-based growth in specialist agencies. WPP launched Everymile, their commerce-as-a-service proposition; completed the acquisition of Village Marketing and the merger of Mediacom and Essence, as well as the creation of GroupM Nexus. Revenue growth expectations are 5.5% to 6.5% for the year.
- **WPP** reported H1 revenue of £6.7 billion (\$8.1 billion), up 10.2% YOY. The group showed strong new business performance with \$3.4 billion net new billings in H1 and operating profit margin of 11.6%. Faster growth areas—experience, commerce and technology (around 39% of revenue)—had less pass-through costs for Global Integrated Agencies, minus GroupM in H1. By industry sector, the following had revenue gains: 12% in technology, 7% in CPG (consumer packaged goods), and 7% in Healthcare. The group is investing for growth, enhancing data capabilities through Choreograph and launch of Everymile, direct-to-consumer e-commerce offerings, and the acquisition of Village Marketing to accelerate creator economy growth and Bower House Digital, a leading marketing technology agency. WPP was awarded most creative company at Cannes Lions for the second year running.
- **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 year-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.

## Agency financials and budget cuts

- Black-owned holding company **Direct Digital Holdings**, which provides an end-to-end full-service programmatic advertising platform to SMBs, announced its filing for its IPO (on the Nasdaq under the symbol DRCT).
- London-based **BeenThereDoneThat** collective, aka the “open talent network” of C-suite talent considered the world's best Chief Strategy and Chief Creative Officers, raised \$6.5 million in a Series A funding round. The agency's approach is to assign 3 thinkers to produce 3 ideas each and produce 9 actionable solutions in 1 week.
- LA-based full-service immersive digital marketing agency **Pretty Big Monster (PBM)** reported 44% YOY revenue growth in 2021 due to growing demand for its AR and VR offerings (as well as websites, social, display, and experiential activations). Clients include Disney, Warner Bros., Sony, Amazon, Netflix, NBCUniversal, and Snap.



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



- Per COMvergence, GroupM agency's Mindshare was the top **global media agency in business development** for the first half of 2022; net new business assignments had a total media expenditure of approximately \$1.2 billion. Three-quarters of Mindshare's total (or \$900 million) came from successfully defending business from key clients such as Master Kong and Dyson in China, and Ferrero in the US. Sibling agency Wavemaker ranked second primarily due to the global wins of Audible and Danone. Dentsu X ranked third, thanks to strong new business wins in the US, including Heineken and JCPenney.
- 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.





## Mergers and acquisitions (M&As) activity and reorganization

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### Acadia

- Atlanta-based marketing company **Acadia** acquired ecommerce specialist firm Bobsled Marketing, which has deep expertise in platforms including Amazon, Instacart, Walmart, and Target. Bobsled is a partner in the Amazon Central Sellers program, and one of 10 named providers in Walmart's new Agency Partner Ecosystem.

### Accenture

- Accenture** acquired Minneapolis-based commerce agency The Stable to build up its commerce expertise globally. The agency, which helps brands build and operate their own digital commerce channels and manage their brand and sales performance across key North American retailers, is now part of Accenture Song.

### Barkley

- Independent creative-idea company **Barkley** acquired Smiths Agency, an independent Pittsburgh marketing company focused on food and beverage brands with clients like Premier Protein, NatureSweet Tomatoes and Spangler Candy.

### Brainlabs

- Brainlabs** acquired influencer marketing agency Fanbytes, strengthening its portfolio with expertise in platforms including TikTok, Instagram, YouTube and Snapchat. Fanbytes' Bytesights is an extensive dataset of more than 3 million influencers connected to TikTok and Instagram. Fanbytes clients include Samsung, H&M, Estée Lauder, Mattel, Ubisoft and Nike.

### Cast & Crew

- Backstage Holdings was acquired by Cast & Crew, a leading cloud-based platform powering production and content creation. Backstage Holdings offers a talent marketplace that provides content tools for creatives including Voice123, a subscription-based marketplace for voice actors; Film Freeway, a tech-enabled submission platform for the world's leading film festivals; and Industry Arts, the global leader for screenwriting resources.

### Cheil Worldwide

- Cheil Worldwide** made a \$13 million investment in Seoul-based EVR Studio, which provides metaverse-based services (AAA console games, metaverse platforms, digital human and XR content) to its clients.

### Ciesco

- Per Ciesco, **largest M&A deals in Q1:**
  - A private equity consortium led by Evergreen Coast Capital Corp. acquired Nielsen for \$16 billion
  - Private equity firm Veritas Capital acquired learning and traditional media company Houghton Mifflin Harcourt for \$2.8 billion
  - Chatham Asset Management acquired multichannel marketing communications company R.R. Donnelley & Sons for \$2.3 billion
  - Content and data company Mobile Streams acquired cloud-based data tool company Krunch for \$1.1 billion
- Per Ciesco, there were 1,033 **M&A transactions** in H1 2022, a 21% increase YOY and a 82% increase over the same period in 2020. The total value of deals was \$28.2 billion, a 68% decrease YOY. Seven deals had announced values of more than \$1 billion in H1 2022. The digital agency, digital media and MarTech sectors showed the highest deal volume. Accenture slowed down its buying spree in its sector.

### Comscore

- Audience measurement firm **Comscore** acquired social media measurement startup Shareablee for \$45 million in a move to expand social media measurement. Shareablee clients include GroupM, Mondelez, ESPN, and NBCUniversal.

### Croud

- 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.

### Dentsu

- Dentsu Group** acquired Pexlify, a Salesforce consultancy based in Dublin. The consultancy will become part of Dentsu International's data and consumer experience management company Merkle. Clients include Allianz, Amazon, and Bank of Ireland.

### Dept

- Dutch-based agency group **Dept** acquired digital shop Feed, an award-winning agency, with offices in London, Manchester, San Francisco, Berlin, Sydney, Paris, and Toronto, specializing in delivering hyper-personalized content at scale for forward-thinking global brands such as eBay, Gumtree, and Ancestry.com.



## Display Social

- Integrated social platform firm **Display Social** acquired the entertainment production company Thunder Studios and virtual reality pioneer Infinite Realities to create a one-stop shop for creators looking to enter the metaverse.

## Ebiquity

- Media auditing firm **Ebiquity** acquired Canada's Forde & Semple Media Works, extending its North America presence.

## Finn Partners

- Independent PR agency **Finn Partners** acquired AHA (Alling Henning Associates), a women-owned Vancouver, Washington-based brand strategy and creative agency that offers purpose-driven marketing and strategic branding, creative, and program execution and implementation services.

## Gravity Global

- London-based B2B agency **Gravity Global** acquired Houston-based 9thWonder B2B and Minneapolis-based creative agency Morsekode, expanding the firm's footprint in the US, namely Los Angeles, Denver, and Detroit.

## GTCR

- Private equity firm **GTCR** acquired Standard Media Index, the syndicated database on competitive ad spending and intelligence that tracks over \$250 billion in annual media buys globally. It will become part of GTCR's portfolio company Dreamscape Inc.

## Havas

- **Havas Group** acquired a majority stake in Spain-based PR agency Tinkle and its offices in Madrid, Barcelona, and Lisbon. Tinkle will be integrated into Havas Group's global strategic advisory network, /amo.
- **Havas Group** acquired Inviqa, one of the UK's leading independent digital experience agencies in a bid to improve scale and capabilities in experience design, software engineering, tech consulting, and ecommerce. The firm will be integrated into Havas Creative's customer service network, merging with Havas CX agency ekino London.
- **Havas Group** acquired search agency Search Laboratory (150 employees in offices in Leeds, London, Austin, and New York) as part of a push by the holding company to strengthen the Havas Media Group UK's data and digital marketing arm. Search Laboratory is a Google Marketing Platform Sales Partner.
- **Havas Group** took a majority interest in Australian performance marketing agency Frontier Australia. Frontier will continue to operate as its own brand but will be integrated into Havas Group's Edge Performance Network.

- **Havas** acquired China-based independent agency Front Networks, which is known for its creative social and digital marketing in China. With offices in Beijing and Shanghai and clients such as BMW, Rolls-Royce, Vivo, Microsoft, Columbia, Bank of China, and Nestlé, Front Networks will join the Havas Creative network.
- **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.

## Horizon Media

- **Horizon Media** acquired First Tube, which specializes in distributing digital brand "experiences" across digital channels, in a move to expand its media services portfolio into digital experiential.

## IGN

- Gaming and entertainment media giant **IGN** acquired global strategic partnerships agency 1TwentyFour, based in Los Angeles. 1TwentyFour will be a stand-alone 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."

## Interpublic Group

- **Interpublic Group** acquired RafterOne, a leading global provider of multi-cloud commerce solutions on the Salesforce platform, to combine it with MRM, the holding company's digital-first customer experience and commerce agency, to deliver highly personalized content that engages and converts in a measurable, precise and repeatable way.

## LaneTerralerver

- Southwest-based digital marketing and branding agency **LaneTerralerver** acquired digital media and consulting firm Convince & Convert. Both agencies will operate under a new collective called Experience Dynamic with a focus on end-to-end customer experience marketing.

## Microsoft

- **Microsoft** acquired AT&T 's Xandr programmatic advertising unit to complement its existing advertising solutions and improve the delivery of its digital advertising and retail media solutions. Microsoft also announced the acquisition of Activision Blizzard, the game developer that owns properties like Call of Duty and World of Warcraft, among many other game franchises, for a remarkable \$68.7 billion, the 15th largest acquisition of the decade.

## Miscellaneous

- Per COMvergence, “**Marketing and communications agency acquisitions** were up sharply in 2021 after declining for several years but still below the level reached five years ago.” Deals totaled 86 in 2021, representing acquired revenues of more than \$2.5 billion. Accenture was the most acquisitive group with 21 acquisitions, among which 13 were in the cloud platform space (including Imaginea). Of all the agencies acquired in 2021, 76% were digital and data, 15% creative, and 1% media.



It’s not about driving costs out to just have the lowest total cost, because then I can’t work with anyone because they don’t care to work with Nestlé. It’s about what we are able to do together.”

Kate Short  
Chief Procurement Officer, Nestlé



- **Technology, digital, and media M&A deals** in Q1 2022 went up by 17% YOY, for a total of 500 transactions despite geopolitical turmoil. The digital agency sector saw a 72% increase, and the three largest markets remain the United States, Western Europe, and the United Kingdom with 419 deals (or 84% of the overall volume). Private equity was the most active buyer in the sectors (40% of transactions). Top deal: Nielsen is being acquired for \$16 billion by a private equity consortium led by Evergreen Coast Capital and Brookfield Business Partners.

## Nielsen Holdings

- A private equity consortium led by Evergreen Coast Capital (an affiliate of Elliott Management) and Brookfield Business Partners have reached an agreement to acquire **Nielsen Holdings** for \$16 billion.

## Omnicom

- **Omnicom** acquired San Francisco-based performance marketing agency TA Digital, which will sit under Omnicom Precision Marketing Group (OPMG) and be closely aligned with marketing transformation consultancy Credera. The move aims at boosting Omnicom’s expertise on the Adobe Experience Platform and its ability to provide digital marketing and business transformation services to clients.
- **Omnicom Health Group** (part of Omnicom Group) acquired Propeller, a digitally-focused (100% digitally native) omnichannel engagement marketing agency that specializes in healthcare to boost its capabilities as an omnichannel strategy, content, and delivery agency within this vertical.
- **Omnicom Group** acquired Transact, a dedicated practice focused on connected-commerce consulting and e-retail execution services. Transact will drive sales and grow market share on e-retail platforms, capitalizing on Omnicom’s recently announced partnerships with Amazon, Instacart, Kroger and Walmart Connect.
- **Omnicom Group’s TBWAWorldwide** acquired Portland, Oregon, innovation agency dotdotdash, a firm focused on building immersive experiences using robotics, augmented reality and 3D spaces. The agency will become part of TBWA’s innovation practice called NEXT and partner with TBWA’s LA-based content and production studio Be Grizzlee. Clients include Adidas, PepsiCo, The North Face and TikTok.

## Optimal

- Optimal Media acquired Austin, Texas-based Effective Spend. The combined entity is relaunching as **Optimal**, which offers performance-based digital marketing services, including paid search and social, search engine optimization, programmatic, connected TV and performance creative.

## Pearl Media

- **Pearl Media** acquired LURE Outdoor, in partnership with Seaport Capital. Pearl Media is now one of the top out-of-home US media companies. LURE Outdoor clients include Calvin Klein, Stella Artois and Uber, which use the firm for street-level OOH ads in more than 120 high-traffic entities.

## Plus Company

- **Plus Company**, a private-equity-backed marketing holding company based in Quebec, acquired Mekanism. The agency has offices in San Francisco, New York, Chicago, and Seattle. Plus Company, the “un network” company, has more than 20 agencies under its umbrella (We Are Social and its sister agencies, Socialize, Hello, Kobe, and Metta; Fuseproject; All Inclusive Marketing, Aperture1, Camp Jefferson, Citizen Relations, Cossette, Cossette Media, and Eleven).



## Publicis Groupe

- Publicis Groupe healthcare network **Publicis Health** acquired Needham, MA-based BBK Worldwide, an R&D marketing firm recruiting patients for clinical drug trials and other services as well as BBK Holdings, the parent company of creative advertising agency 320Agency and several other operations.
- **Publicis Groupe** acquired Bucharest, Romania-based Tremend, an independent software engineering company that will serve as a global delivery center for the Groupe's digital transformation specialist Publicis Sapient.
- Holding company **Publicis Groupe** acquired Profitero, a software as a service (SaaS) e-commerce software firm for 200 million euros (\$210 million). The deal allows the group to deepen analytics capabilities and measure how brands' products move through different digital shelves.
- **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.

## R3

- Global marketing consultancy **R3** acquired ad intelligence platform Adbrands.net (Adbrands), which reports on over 1,000 leading advertisers, brands, and agencies, and tracks the world's leading brands and companies. It includes information such as business records, geographic strength, and comparative performance of holding companies and key agencies, strengths, weaknesses, history, up-to-date news, and top-line financial information.

## rEvolution

- Chicago-based sports marketing agency **rEvolution** acquired Detroit-based integrated marketing agency Centigrade. Centigrade specializes in marketing communications, public relations, experiential activation and motorsports, serving clients such as Lamborghini, Lotus, Bugatti and Alfa Romeo.

## S4 Capital

- **S4 Capital** acquired social media and influencer marketing agency XX Artists, which it will combine with S4's content company Media.Monks. XX Artists clients include Google, YouTube, Logitech, and Ancestry.com, and the agency collaborates with top musicians, actors, artists, and public figures on their digital platforms.

## Salient Global

- Chicago-based marketing firm **Salient Global** acquired ICX Media, which developed algorithms used to create 100 million unique "Rich Profiles" that help drive precision marketing strategies through media buys, data-driven storytelling, and co-branding campaigns.

## Simpli.fi

- Workflow and programmatic advertising solutions provider **Simpli.fi** acquired CoreMedia Systems to strengthen its direct/brand response analytics, attribution, and media management capabilities. Agencies and brands can buy and analyze linear and connected television (CTV) advertising with addressable, mobile, video, display, native, and social.

## Sortis Holdings

- Portland, Oregon-based **Sortis Holdings** acquired D2C-focused digital agency WLCR to strengthen its offering. Sortis develops brands and properties in the lodging, food and beverage, and beauty and wellness sectors.

## Stagwell

- Harris Poll owner **Stagwell Group** acquired UK-based media agency Good Stuff Communications. The UK's second-largest independent media agency is now part of the Stagwell Media Network and will offer media planning and buying services, analytics, audience research, and digital audits. Good Stuff clients include On the Beach, Hello Fresh, Yorkshire Tea, and more.
- **Stagwell Group** acquired Instrument, a Portland, Oregon based fast-growing digital transformation company for \$160 million. The holding company previously owned 51% of the agency through MDC Partners. The agency employs 400+ people working on top-brand clients such as Nike, Google, Salesforce, and Epic Games.
- **Stagwell** acquired full-service multicultural agency Dyversity Communications, based in Toronto. The 30-plus staff agency, with clients like Canada Post and Hershey's, specializes in Chinese and South Asian communications and more than 20 other languages.
- **Stagwell** acquired Warsaw-based e-commerce company Brand New Galaxy after the firm joined Stagwell's Global Affiliate Program in 2021. The firm joins the Stagwell Media Network, adding scale to the group's existing e-commerce capabilities.
- **Stagwell** acquired West Coast agency Wolfgang, which will become part of the Doner Partners Network (DonerNorth, Yamamoto, HarrisX, Veritas Meat & Produce, KWT Global, Cahoots, Dyversity) to strengthen creative abilities and build an even stronger presence on the West Coast. Clients include Adidas, Men's Warehouse and Jos. A. Bank. The holding company initially bought a minority stake in Wolfgang in 2019.



- **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.

### Tremor International

- **Tremor International**, a video-focused advertising-technology company, acquired Amobee, a cloud-based, data management, cross-channel, demand-side advertising platform for \$239 million in a move to expand Tremor’s demand-side market share.

### True Independent Holdings

- **True Independent Holdings**, parent company of True Media, acquired 30-year-old St. Louis-based media agency DICOM, bringing True Media’s staff to 175+ media strategists, planners, analysts, and buyers.

### Twitter

- **Twitter** acquired a minority stake in digital ad firm Aleph Group, which provides digital advertising education, training, and certification to 50,000+ digital professionals in 90 countries worldwide.

### UTA

- LA-based talent agency **UTA** acquired ad management consulting firm MediaLink for \$125 million from UK based Ascential plc, which operates the Cannes Lions advertising awards festival and paid \$207 million to acquire it in 2017.

### Viral Nation

- Global influencer marketing agency **Viral Nation** acquired influencer analytics company MediaKits to integrate MediaKits’ data aggregation with its tech platform to help artists, influencers, athletes and creators better understand and reach their audiences.

### VSA Partners

- Hybrid brand strategy and design agency **VSA Partners** acquired consultancy RoundTwo Digital in a move to expand digital capabilities, including e-commerce, media, analytics, and customer journey and experience strategies for clients like Google, Nike, and IBM.

### We Are Social

- Social creative agency **We Are Social** acquired a majority stake in influencer-marketing and Singapore-based agency Kobe, growing its position in the region. Kobe collaborates with celebrities and influencers. Clients include PepsiCo, Logitech, and Suntory.

### White64

- Washington, DC-area marketing agency **White64** acquired the Jake Group, a 20-year-old independent branding and digital studio. The agency will serve as the group’s de facto digital advertising and marketing services department.

### WPP

- **WPP** acquired Village Marketing, an influencer marketing all-female-staff firm that managed President Joe Biden’s campaign, which uses influencer content alongside performance marketing strategies to drive results for clients like Nike, Netflix, and SoulCycle.
- Holding company **WPP Group** acquired Australian MarTech services agency Bower House Digital, which will be merged into the Ogilvy network to strengthen the group’s tech solution offering. Existing clients include Target and Nike.
- **WPP** acquired Brazilian e-commerce agency Corebiz, which operates in Latin America with major hubs in São Paulo and Franca, Brazil, to strengthen the holding company’s commerce capabilities in Latin America. Clients include Whirlpool, Casino Group, Walmart, Carrefour, Decathlon, and Estée Lauder. The firm is now part of the VMLY&R Commerce global network.
- **WPP** acquired Passport Brand Design, a brand design agency that offers brand identity, design expertise and insight capabilities. It will join VMLY&R’s global network. Clients include Coca-Cola, Kraft and Heineken.
- **WPP** acquired Newcraft, a European data-first company and e-commerce consultancy based in the Netherlands, to enhance WPP’s digital-commerce abilities. The agency will join Wunderman Thompson’s global network in Northern Europe. Newcraft’s clients include Ahold Delhaize, Pon Holdings, Yakult and JDE Peet.
- **WPP** acquired JeffreyGroup, an independent corporate communications, public affairs and marketing consulting firm in Latin America. The agency will join the Hill+Knowlton Strategies international network, creating the largest global communications agency presence in Latin America.
- **WPP** purchased the remaining 26% stake in MediaCom Communications Private Limited in India.





## Payment terms and compensation

- » **Omnicom** announced that CEO and Chairman of the Board John Wren received \$20 million in total compensation in 2021, the highest-paid job at the holding company. The executive took no salary from April through September 2020 in response to the pandemic.
- » 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.

## Noteworthy quotes

- » “The way agencies charge and what they charge clients will need to change amid the competing poles of client’s resistance to pay more for services and employees demanding increased salaries and compensation.” —Marla Kaplowitz, President and Chief Executive Officer, **4A’s**
- » “To maintain or grow margins, agencies have downsized and held salaries at very depressed levels.” —Michael Farmer, Chairman and CEO, **Farmer & Company LLC**
- » “As you are supporting your business, look beyond their short-term relief at getting help to support a short-term need and consider if you are giving them an experience that makes them see you as someone who can help them drive value beyond supply continuity or short-term cost mitigation.” —Philip Ideson, Founder and Managing Director, **Art of Procurement**
- » “The way marketers do business and the demand on their business has changed, and companies need to refresh how their accounts are being serviced.” —Michael Goldberg, Principal, **Rojek Consulting Group**
- » “Let’s get comfortable with being uncomfortable.” —Rob Lenois, Chief Creative Officer, **VaynerMedia**
- » “The increasing cost of labor in this highly competitive talent marketplace will affect how agencies price and service a client’s business.” —Marla Kaplowitz, President and Chief Executive Officer, **4A’s**
- » “Holding companies need to review their operations and focus on solving the pricing problems that cause so many difficulties. They should emulate the consulting firms who achieve premium prices by delivering improved client results.” —Michael Farmer, Chairman and CEO, **Farmer & Company LLC**
- » “Marketing should be seen as a profit center, and clients should see the money they spend with an agency as an investment.” —Jeff Meade, Founder and CEO, **MEADE**

- » “If your agency’s rates have not increased, you should ask why not. It is far better to deal with a rate increase than agency talent or service degradation.” —Steve Boehler, Founder/Partner, **Mercer Island Group**
- » “With the rise in project-based work versus traditional retainer relationships and the dramatic expansion of technology enabled support, including programmatic media buying, we believe that the most effective means of compensating advertising agencies is time-and-material.” —Cliff Campeau, Principal, **AARM**
- » “The ad industry, which so admirably mastered the technical complexities of digital and social media, is threatened by its deteriorating business economics. The business model is broken.” —Michael Farmer, Chairman/CEO, **Farmer & Company LLC**
- » “Agency success is no longer about volume. It is about providing innovative work for clients that wins awards and enables our clients to deliver their desired business outcomes.” —Margaret Wagner, President, Merkle EMEA and CXM service line, **Dentsu**
- » “Talent changes, needs change within the business capabilities, new agencies come up and it’s just a good process to keep me and my marketing team on our toes as well as just continuing to connect with additional people that are in the field.” —David Zucker, CMO and Senior VP of e-commerce, **Perdue**
- » “Perhaps if advertisers were not so quick to try and hide the true financial cost of the pitch process, by encouraging models that have the agencies pay, and then assessed the true cost of pitch against the value of the outcome, then you would hope there would be less time wasting and less poor outcomes from pitches.” —Darren Woolley, Founder, **TrinityP3**
- » “As a means of measuring agencies’ success, billings are largely unrepresentative. Worse, they’re a fundamentally exclusionary metric.” —Dominique Bergantino, Co-President and Managing Director, **Havas Helia**
- » “Being able to show marketing’s value and how it fits into the overall business strategy is now a must-have for every marketer.” —Matthew Lieberman, CMO, **PwC US and Mexico**
- » “Advertisers must protect their legal and financial interests by crafting contract language and implementing the appropriate controls, including performing periodic audits.” —Cliff Campeau, Principal, **AARM**
- » “A basic tenet of principal-agent relationships is that the agent is bound to make decisions and to take actions that are in the best interest of the principal...always. This, in turn, guides interactions between the parties in a manner that achieves the highest possible degree of accountability and ultimately trust.” —Cliff Campeau, Principal, **AARM**

- » “Loss in efficiency is the risk of complexity. However, we believe that the secrets to successful integrated partnerships are based on constant fundamentals applied in new ways.” —Greg Paull, Co-Founder and Principal, **R3**
- » “Given the economic headwinds of today, there is no better time than now to put a new pay structure in place and truly build a partnership with your client, and in doing so, realign your relationship.” —Michael Aaron Flicker, Founder and President, **XenoPsi**
- » “To paraphrase Nassim Nicholas Taleb, in his New York Times best-selling book *Skin in the Game*, ‘People have two brains, one when there is skin in the game, one when there is none.’ Can anyone argue? When there is fire, you will run faster than in any competition.” —Michael Aaron Flicker, Founder and President, **XenoPsi**
- » “Agency scopes of work, like American waistlines, have ballooned during the past several decades, driven by clients’ insatiable appetites for digital/social work and accepted by their agency partners, who are keen to demonstrate their integrated capabilities.” —Michael Farmer, Chairman and CEO, **Farmer & Company LLC**
- » “The sexiness of a pitch...everybody’s obsessed with ‘I won this.’ Yeah, but you spent \$300,000 and it’s going to take you three years to make that up.” —Sandy Greenberg, Co-Founder and CEO, **Terri & Sandy**
- » “Remember: marketers don’t want to ‘buy’ marketing services; they have business issues they need help addressing.” —Lindsay O’Neil, Director, **Mercer Island Group**

- » “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**
- » “We took a billion dollars of marketing—primarily performance marketing—and we turned it off, and you know what happened? Almost nothing. And we realized our brand is stronger and more differentiated, and we’re gonna lean into our differentiation. We’re gonna do fewer things. We’re gonna be totally functional. And we became an entirely creatively led company.” —Brian Chesky, Co-Founder and CEO, **Airbnb**
- » “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.” —Iain Seers, CEO, **RightSpend**

**Event we attended:**

# ANA Advertising Financial Management Conference

We sponsored the ANA Advertising Financial Management conference held in Orlando, Florida, where we had the opportunity to reconnect with friends, colleagues and clients.

A successful event in terms of content and attendance (both in person and virtual), we were thrilled to see the level of excitement and shared ambitions attendees and speakers demonstrated for innovation and new ways to tackle industry challenges, such as diversity and inclusion, responsible advertising and how to close the gap between weak and strong client-agency partnerships.



Advertising	Precision Marketing	Commerce & Brand Consulting	Experiential	Execution & Support	Public Relations	Healthcare
Creative, strategic media planning & buying, performance media	Digital & direct marketing, digital transformation consulting, AI, data & analytics	Brand consulting, strategy and research to drive conversion and transaction across physical, digital and social	Live and digital events and experience design and execution, celebrity & influencer marketing	Field marketing, digital and physical merchandising, point-of-sale, product placement, specialty research	Corporate communications, social and earned media, public affairs, crisis, M&A, CSR	Advertising, media and communications services for global healthcare and pharmaceutical industry

# Need to streamline your agency management?

**ScopeDeliver** is an end-to-end agency scoping tool designed to streamline annual staffing/financial planning and ongoing management of deliverables, and agency and supplier resources. SOW software solutions done right!

**ScopeDeliver™**

What are the benefits?  
 Every fiscal calendar is just a series of resources and efforts are invested in securing the right marketing objectives and budgets to support the commercial goals of the company. A transparent and comprehensive view of all agency deliverables produced is vital to identify the right talent and number of agency resources that must be secured in the delivery of campaign work. Without the right SOW data to deliver benchmarks, client organizations are ill-equipped to adequately plan and negotiate staffing, fees, and other expenses. ScopeDeliver provides marketing and procurement organizations with rich features, insightful views, and reports to ensure a streamlined process is in place to lock in deliverables, financials, and staffing plans.

- Decision Making: Integrated reporting with clear actions, availability of information, visibility of financials, and access to marketing & operations. Calculate budgeting summary, view and filter across client, division.

## 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







## Appendix 126 Pitches and Account Moves Assessed

Advertiser	Category	Budget (M\$)	Assignments	Media	Agency	Last Incumbent	Quarter of win	Zone coverage
De'Longhi	Home Goods	13	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Mediaplus North America	Wavemaker	2022 Q2	Local
Discover Card	Financial & Insurance	200	BUY, PLAN	DIG	Mindshare	dentsu X	2022 Q3	Local
Discover Card	Financial & Insurance	87	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN)	Mindshare	Spark Foundry	2022 Q3	Local
Duracell	Home Goods	15	BUY, PRG	DIG	Mediacom	Jellyfish	2022 Q3	Local
Eargo	Healthcare	20	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	UM	MMSI	2022 Q1	Local
EchoPark Automotive	Automotive	8	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	VaynerMedia	Various	2022 Q3	Local
Ekaterra	Soft Drinks	39	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	PHD	Mindshare	2022 Q3	Global
Enchant	Entertainment & Media	2	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Canvas Worldwide	N/A	2022 Q3	Local
Estée Lauder	Personal Care	90	BUY, PLAN, SEA	DIG	Media.Monks	iProspect	2022 Q2	Local
Exact Sciences	Pharmaceutical	159	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	OMD	Publicis Health Media	2022 Q1	Local
FedEx	Services	112	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Hearts & Science	OMD	2022 Q2	Local
Ferrero	Food	238	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Mindshare	Retained	2022 Q1	Local
First Republic Bank	Financial & Insurance	10	BUY, PLAN, SEA	DIG	Performics	N/A	2022 Q1	Local
Focus Brands	Restaurants	10	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	OMD	Various	2022 Q2	Local
Frontier Communications	Telecom	47	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Starcom	Trilia	2022 Q3	Local
Genexa	Pharmaceutical	7	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Canvas Worldwide	N/A	2022 Q2	Local
Giant Eagle	Retail	14	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	In-house	mSix&Partners	2022 Q1	Local
Great Day Improvements	Real Estate	15	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Horizon Media	N/A	2022 Q3	Local
GrubHub	Online Food Ordering	73	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	UM	Various	2022 Q1	Local
Guardant Health	Pharmaceutical	4	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Havas Media	N/A	2022 Q1	Local
Heineken	Alcohol	195	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	dentsu X	Canvas Worldwide	2022 Q2	Local
Hey Dude	Clothing	10	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Digitas	N/A	2022 Q2	Local
Hydrow	Sports	30	BUY, PLAN, SEA	DIG	Performics	VaynerMedia	2022 Q1	Local
Impossible Foods	Food, Retail	3	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Horizon Media	Mediacom	2022 Q2	Local
Insmed	Pharmaceutical	6	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	dentsu X	N/A	2022 Q1	Local
Insurance Zebra	Financial & Insurance	34	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	OMD	Assembly	2022 Q2	Local
Jabra	Electronics	5	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	mSix&Partners	N/A	2022 Q1	Global
JCPenney	Retail	165	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	dentsu X	OMD	2022 Q1	Local
Kaiser Permanente	Healthcare	83	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Hearts & Science	Campbell Ewald	2022 Q1	Local
Kellogg's	Food	40	BUY, ECOM, SEA	DIG	Starcom	Flywheel Digital	2022 Q3	Local
KFC	Restaurants	196	BUY, PLAN, SOC	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Spark Foundry	Wieden+Kennedy (media)	2022 Q1	Local
Kohls	Retail	274	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DIG	Horizon Media	Zenith	2022 Q2	Local

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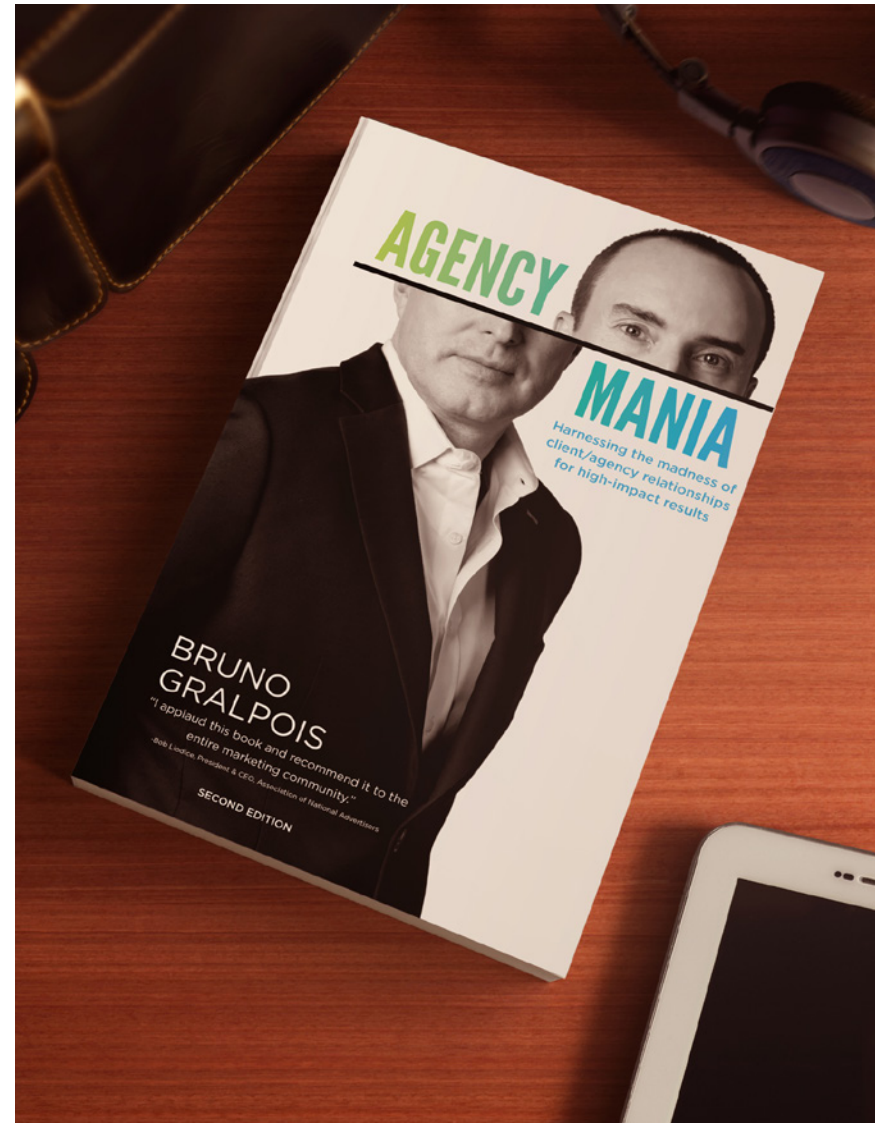
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## A word about the author:

Bruno Gralpois has been instrumental in establishing Agency Management as a central global discipline for many of the top 200 advertisers. His commitment to successful client/agency partnerships led Gralpois to co-found Agency Mania Solutions and serve as principal. Before that, he held leadership positions at industry-leading companies, including Microsoft and Visa, as well as various pre-IPO software companies. Bruno is an active member of the ANA Faculty of Marketing, which helps build effective advertiser-agency relationships.

**Bruno Gralpois, Co-Founder and Principal, Agency Mania Solutions**

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