

# Industry Update

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

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ARTICLE



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Contributed by: Blum Consulting Partners

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### EXECUTIVE SUMMARY: June-July recap

Bonjour, mes amis! The world of advertising converged on the French Riviera once again at the International Festival of Creativity near, and sometimes on, the beach of Cannes, enjoying post-COVID and celebrating la crème de la crème in advertising. The sight of old pal and global CMO Ryan Linder play a Stagwell Global-sponsored pickleball tournament at Sports Beach would have justified the long intercontinental flight (Ryan, btw, where was my invite?! 😊).

Instead, I attended ProcureCon London a few days prior, which also had strong attendance from the world's largest brands, their marketing procurement teams, and remarkable industry speakers. But let's be frank: No matter how thrilling London is, it's rather a tough competition with Cannes and its Promenade de la Croisette, pine and palm trees, and fine dining.

This year, the Cannes Lions International Festival of Creativity scored 26,992 entries, a 6% increase from 2022 and an 18% jump in entries directly from consumer product brand companies, showing the level of enthusiasm for celebrating world-class creativity and effectiveness, including emerging categories like B2B, Gaming, Commerce, and Business Transformation. Iconic in nature, the event illustrated the thriving creativity and ingenuity of our industry.



**Bruno Galpois**

Co-Founder and Principal,  
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## TALENT: Securing the right talent and resources



In our Volume 70 Industry Update, artificial intelligence was a hot topic and remains so in this edition as brands and agencies explore how to leverage AI in every aspect of their operations and activities. So, it only made sense to create a new Industry Update section dedicated to AI to cover developments and trends. Be sure to check it out. Agencies are moving aggressively to secure these capabilities as evidenced by Publicis Groupe's purchase of AI Labs, WPP's partnership with Nvidia to launch a generative AI platform, and Omnicom's deal with Adobe, Google, and others. Given the level of interest and excitement, I anticipate many more announcements about AI here moving forward.

- Per Brand Keys, **top concerns keeping CMOs up at night** (in priority order):

- 1) ROI
- 2) Inflation/Recession
- 3) Profit/shareholder value
- 4) Budget cuts
- 5) New competitors
- 6) Brand purpose/ESG (environmental, social, and governance)
- 7) Customer experience
- 8) AI
- 9) Consumer expectations
- 10) Consumer engagement

"Work from home/Remote working" and "COVID management issues" were down by 14% and 15%, respectively. Two topics dropped from the list this year: "Remote working upsetting creativity" and "Burnout."

- The **4A's (aaaa.org)** launched an initiative with Catalyte and its end-to-end, AI-driven, reskilling program to eliminate hiring bias and create opportunities based on aptitude, regardless of background or education. The partnership also helps expand the pool of vetted candidates from nontraditional backgrounds, focusing on entry-level jobs and offering intensive apprenticeship training opportunities (the 4A's reports a conversion rate to full-time hires of 90%).
- **Advertising Production Resources** launched its Marketer's Guide to Creative Production book, providing an expert resource to all sides of the advertising industry, including clients, agencies, and production companies.
- Per **Blum Consulting Partners**, here are criteria to consider before deciding where agency management should reside organizationally:
  - 1) Current organizational setup
  - 2) Geographical footprint
  - 3) Marketing and product portfolio
  - 4) Brand ecosystem
  - 5) Agency model and strategy

- Agency matching firm **Brief** expanded its services to include new payment options. As a core offering, Brief allows brands to find a new agency in less than seven days from a marketplace of over 10+ vetted agencies based on several criteria (size, location, expertise, past clients, industry awards, etc.) and specialty needs (e.g., TikTok strategy, audio advertising, influencer programs). The agencies then pitch for the work within a week. First-time posting fee is \$99.
- **Stagwell**, formerly The Stagwell Group, is a global marketing and communications group. Founded in 2015 by Mark Penn, it became a Fortune 1000 company in less than two years. Stagwell, which merged with MDC Partners in 2021, operates in four areas: digital transformation and marketing; research and insights; marketing communications; and content and media.
- **Walmart Connect** named five creative agency partners for marketers using the retail network's self-service advertising tools: VidMob (creative analytics), WhyteSpyder (e-commerce), Kaizen Ad (mobile-optimized video ads), ItsRapid.ai (creative asset management and optimization), and The Mars Agency (full-service shopper and commerce). The company is projected to realize \$3.5 billion in revenue this year.
- Multinational supermarket and convenience store giant **Carrefour Group** and **Publicis Groupe** launched a retail media joint venture, named Unlimitail, leveraging Publicis Groupe's CitrusAd powered by Epsilon platform and Carrefour Links, the company's in-house retail media platform.
- A **Forrester** report titled "Ditch the Pitch" proposes a better way for ad agencies and clients to hook up and engage in fruitful, long-term relationships while avoiding common complaints about the process of searching for and hiring agencies. Among other recommendations, Forrester suggests designing paid projects that clients can assess when selecting an agency, and a six-week process from the start of preparation through selection. The firm estimates US agencies spend \$12.5 billion annually on pitching business.

### New agencies or capabilities, restructurings, and reorganizations:

- **Publicis Groupe** launched a new "end-to-end" production offering for clients that it has dubbed PX, in partnership with Adobe (including Adobe's generative AI capabilities) and a suite of tools and platforms in its Content Supply Chain solution. Directly connected to Publicis Groupe's network of 50 content studios, the capability allows marketers to originate, adapt, version, and optimize content with data-driven personalization at scale.
- **Interpublic Group (IPG)** launched a Creative Commerce Labs program to enhance its end-to-end commerce offering, allowing cross-channel collaboration and partnering with key commerce innovators, such as Amazon Ads Brand Innovation Lab.

- **Havas** launched an offering that combines wellness and entertainment, called Welltainment, that creates content with brands around hypertension, diabetes, obesity, mental health, pediatric asthma, and sexual wellness. The agency will co-create entertainment content with writers, producers, musicians, and game programmers to create content such as movies, TV shows, games, and music.
- **Stagwell's Doner Partners Network** launched a new integrated media offering, Doner Media, allowing clients to leverage its now integrated creative/media capabilities and skill set. Doner Media will provide media planning and buying, audience and communications planning, creative testing, optimization, and real-time reporting.
- **Publicis Groupe** launched an integrated suite of retail media solutions (including products such as Shelf Intelligent Media and Shelf Intelligent Content), as part of its Profitero commerce analytics unit. The suite enables optimization of media activation, planning, and measurement across the largest retail media networks for use on and off retailer sites, including connected TV, as well as boosting sales by optimizing product detail pages and keywords in digital retail through recommended improvements to product copy, titles, and images.
- An independent multicultural creative consultancy called **Included** launched to offer advertising, idea development, diversity, strategic branding, and content creation. The agency was created by the global chief creative officer for DDB's McDonald's account, Luis Miguel Messianu.
- **Omnicom DDB Worldwide** merged two of its agencies, Adam&EveNYC and DDB New York, forming a new agency operating under the Adam&EveDDB name with the goal to combine the startup creative dynamism of Adam&Eve with the scale of the operations of DDB in New York. Key combined clients now include PepsiCo, JetBlue, NBA 2K, PlayStation, Kroger, Kroger Health, Cotton, Lipton, and Molson Coors.
- **Havas Media Network** launched CSA (Consumer Science & Analytics), a new stand-alone offering, initially available in France, Italy, Spain, the UK, the US, and LATAM, that extracts far more meaningful insights from data by leveraging top talent, data, and tech.
- UK creative agency **VCCP** launched a generative AI-focused agency called faith. The agency will act as the group's generative AI creative shop through a pioneering partnership with two universities, and also as an explorative R&D hub. The agency created and has been using generative AI tools within its media, data, planning, production, and UX/UI capabilities.
- Stagwell's digital agency **YML** launched a new Accessibility and Inclusive Design practice to help clients comply with Web Content Accessibility Guidelines, aiming to take a leadership role in promoting accessibility and inclusive design across the digital industry.

## Artificial intelligence:

- **Forrester** predicts that 33,000 jobs, or 7.5% of US ad agency jobs, could be lost to generative AI automation by 2030.
- The **Center for AI Safety** released a statement warning of the "extinction"-level risks that AI poses to humanity. More than 350 of the field's top developers co-signed the letter. The European Union is expected to develop its own government regulation and policies in regard to technology and issues surrounding transparency, privacy (aka general data protection regulation), and copyright infringement.
- Consulting firm **Accenture** announced it is investing \$3 billion in the next three years into AI across categories including assets, tools (such as Accenture's AI Navigator for Enterprise), acquisitions, research, and talent.
- **Adobe** announced it will sell flat-rate subscriptions for new AI services, including legal assurance against copyright infringement claims. Licenses will remove watermarks from generated images, and if a customer is sued for infringement, Adobe will pay damages and assist.
- **Publicis Sapient**, the digital business transformation and consultancy arm of Publicis Groupe, mandated that teams use generative AI from the generation of short-form video series to media research and optimization to improve speed (hours now instead of weeks), improve the quality of content, and cut costs while allowing Publicis' teams to dedicate their time to more in-depth projects. The goal is to incorporate AI into their work, experiment, learn from it, use it, and be inspired and challenged. The firm recently launched a series of 60-second videos entirely built using generative AI technology. The series took two hours versus the typical two to three weeks to produce. The media team recently incorporated an AutoGPT tool called GoalAI to augment their research and insight process.
- Consulting firm R3 issued a report titled "**AI in Creative & Production**" as a guide for brands on key AI-related topics including AI, Creative Teams & The Value of Talent (and correlation with in-house talent), Applications of Generative AI (across creative marketing and production), and Generative AI Best Practice (best practices and case studies).
- **McDonald's** developed an out-of-home ad campaign in Brazil using AI in partnership with Galeria.ag. The ad featured a question ("What's the most iconic burger in the world?") and a reply from ChatGPT.
- **Coca-Cola** partnered with management consulting firm Bain & Company and OpenAI to enhance the capability and creativity of its marketing department. Coca-Cola launched an AI-centric campaign, "Create Real Magic," using the latest versions of DALL-E and ChatGPT, giving consumers access to a library of hundreds of the company's visual assets and invited them to use the assets to create AI-generated artwork. In less than two weeks, 120 images were generated. Coca-Cola selected several pieces of AI artwork submitted by consumers to be displayed on digital billboards in New York's Times Square and London's Piccadilly Circus.



- **The Trade Desk** launched an AI platform, Kokai, that can act as a co-pilot for programmatic advertisers, distributing deep learning algorithms throughout the digital media buying process based on access to over 13M ad impressions per second. The AI tool also includes a retail sales index, TV quality/reach indexes, and retain measurement data.
- **Interpublic's Huge** launched an AI-based analytic engine called Huge LIVE (Living Intelligence Value Engine) that analyzes billions of data points and is designed to help clients identify opportunities in real time and accelerate growth. The engine comprises proprietary AI technology combined with third-party AI platforms in collaboration with sibling company Axiom.
- **Girl Scouts of the USA** used AI in a Google Ads search campaign to reduce cost per acquisition, achieving 40% savings by making thousands of adjustments to the campaign in less than a week.
- **The Association of National Advertisers' (ANA) updated media contract template and guidelines** encourage brand advertisers to seek full transparency and provide explicit consent to their ad agencies before they use AI tools to produce work.
- Some agencies, like **BBDO Worldwide**, issued internal memos that urged its employees to refrain from using AI tools in client work unless formally permitted to do so by the agency's legal team to avoid copyright, ownership, and confidentiality issues.
- **WPP's Ogilvy** announced it will label influencer content on social media with the hashtag #PoweredbyAI or by using a dedicated watermark to address the proliferation of AI-generated influencer ads and encourage transparency. The agency is inviting other agencies to adopt this industrywide policy (referred to as the "AI Accountability Act").
- **WPP** set up a partnership with tech company Nvidia to offer clients a new advertising platform based on generative AI capabilities (from the cloud platform Nvidia Omniverse) and connecting generative AI tools from partners such as Adobe and Getty Images. Brands can create 2D images and videos from text, as well as 3D simulations and compelling content for advertising purposes, at a new, unmatched level of realism and scale.
- **Omnicom Group** and **Google** formed a partnership to integrate Google's generative AI models into Omni, an internal marketing and data platform that works with cloud services, including Google Marketing Cloud, giving brand advertisers generative text and image capabilities. Omnicom initially launched two Google AI models called Imagen and PaLM 2 (Imagen is similar to DALL-E, for generating images, and PaLM 2 is Google's language model for text).
- **Omnicom Group** kicked off a joint initiative with Adobe to bring enterprise generative AI capabilities to shared clients, leveraging Adobe Firefly models and Sensei GenAI and combining it with Omni data to create highly effective on-brand content and mass personalization at scale. Omnicom was the first advertising holding company to join Adobe's Content Authenticity Initiative. Omnicom recently implemented an enterprise licensing deal of Adobe's Content Supply Chain solution, allowing its agencies to have a unified view of every step of the content process.
- **Omnicom Group** announced a partnership with Amazon Web Services (AWS) to drive innovation with generative AI foundational models for advertising. Omnicom will use AWS generative AI and machine learning (ML) services, including Amazon Bedrock and Amazon EC2 Trn1n instances powered by AWS Trainium chips that are purpose-built for ML workloads, and will advance its AI-powered platform Omni—an open operating system that ingests trillions of advertising signals monthly and stores more than 10 petabytes of data.



FEATURE Highlight

# Scorecard

AGENCY MANIA SOLUTIONS

Looking for more centralized management and reporting of important KPIs related to agency relationships and overall performance? There is a better way. Scorecard is an optional module available within **KPIDeliver**, that measures performance against agency KPIs and bonus and malus calculations for incentive-based compensation agreements. **Request a demo** to learn more.

- **Omnicom Group** launched its Omni 3.0 capabilities, including Omni Assist and Omni Commerce. It launched Omni Assist, a ChatGPT-based chatbot and AI assistant embedded into Omni and developed in partnership with Microsoft, enabling audience development, planning, activation, measurement, and optimization.
- **Meta** launched a program called AI Sandbox to allow generative AI into its ad platform, allowing ads in feeds and videos on Facebook and Instagram, personalized messages in ads, and more.
- **The Brandtech Group** launched Pencil Pro with Unilever and Bayer as partners. The AI offering generates multiple channel ads and copy by looking at a brand's objectives, assets, and preferences. The process apparently takes minutes, and the resulting content is up to 10x lower in cost to produce but achieves 2x better results.
- PR platform firm Cision issued **a code of ethics tied to the development of AI-driven capabilities**, including:
  - 1) Rigorous testing, validation, and ongoing monitoring to minimize potential harm
  - 2) Privacy protection and security of client information
  - 3) Transparent documentation and explanation of AI objectives, potential risks, and mitigations
  - 4) Commitment to maintaining human oversight while targeting and eliminating bias where possible
- IPG-owned agency **Huge** launched the Creative Capital Index (CCI), an AI-powered tool born out of the data capabilities of LIVE (Living Intelligence Value Engine), a platform that uses AI to sift through data points—both traditional and nontraditional—to uncover insights for brands. The agency leverages its IPG data solutions and combines it with generative AI tools such as ChatGPT and Midjourney to provide insights on human behavior.
- **Microsoft** launched Predictive Targeting, an AI-based offering available on Audience Ads, allowing brands to find new audiences who are more likely to convert. The Microsoft AI tool learns about individual consumers, what they're searching for, what they read and engage with on the web, what they purchase, and more. Then, it matches intent to ads in placements across MSN, Microsoft Start, Microsoft Edge, Outlook, etc. Advertisers using Predictive Targeting saw an average 46% higher conversion rate.
- A new **Virgin Voyages** campaign from VMLY&R called "Jen AI" allows customers to use generative AI to create custom invitations from Jennifer Lopez (who doesn't have time to call everyone) to send to friends and family.

### In-house agencies:

- The **ANA** held its **annual in-house agency conference**, celebrating top talent and accomplishments in 14 categories, including Best Collaboration Effort, Best Media Plan, Branded Content, B2B Marketing, Experiential (in person and virtual), Integrated Campaign, Internal Communications, Out of Home, Significant Results, Social Media, and Socially Responsible, showing the incredibly diverse ways in-house agencies are contributing to marketing performance among large brands.
- **cain&abelDDB**, one of the leading creative production agencies in the UK, launched an in-house immersive model that the agency is calling On-Site ("Creativity Made Personal") to deliver creative excellence for clients like Visa (aka VISA Design Hub).

### Responsible advertising (diversity and inclusion, environment):

- The **Global Alliance for Responsible Media (GARM)** and **Ad Net Zero** launched a new initiative and resource to address media's climate impact and to standardize methodology for media decarbonization. The document, called the GARM Sustainability Action Guide to Reduce Media Greenhouse Gas Emissions, provides common definitions, common metrics, shared tools, independent verification, and more.
- Climate change industry activists and protesters gathered at agency HQs of Wunderman Thompson and Havas to protest the agencies' partnership with fossil fuel and energy giant **Shell** as it initiates a major review of its media agency relationships.
- Per **GARM**, 10 steps to cut back on climate-harming emissions from the media ecosystem:
  - 1) Build a sustainability-assured media partner list
  - 2) Streamline media value chain and technology
  - 3) Improve sustainability of creative assets based on media sufficiency
  - 4) Compress and consider length of digital creative formats
  - 5) Stream content and landing destinations versus preload
  - 6) Optimize ad flighting to include off-peak energy periods
  - 7) Streamline and optimize data usage
  - 8) Look for sustainability in print
  - 9) Look for sustainability in outdoor
  - 10) Consider emissions data in media measurement models
- Per IPG-owned agency **Magna**, eliminating impressions that don't comply with the Media Rating Council standards would reduce 6% of carbon emissions generated by online advertising, and the longer a digital ad is viewed on a page, the lower the carbon emissions created as a result. (For example, a spot viewed for 10 seconds produced 64% less carbon emissions than a spot that was in view for 5 seconds.)
- 50+ brands (Eli Lilly, Pfizer, HP, Intel, Sony, Levi Strauss, Mondelez International, etc.) signed a statement developed by GLAAD in support of the **LGBTQ+ community**, rejecting harassment and bullying and pledging to join together to reaffirm their unwavering commitment to LGBTQ+ individuals.
- Spending on **Black-owned media** made up 62% of the spending on **diverse-owned media** in 2022. Black-owned companies only made up 47% of diverse-owned outlets. AIMM/SMI reported that spending with Black-owned media companies tripled since 2020, to \$880 million. Spending on diverse-owned media rose at an 80% annual rate from 2020 to 2022, going from \$400 million to \$1.4 billion. Spending on all diverse-owned media made up only 1.85% of total spend in 2022, and spending on Black-owned media comprised 1.16%.

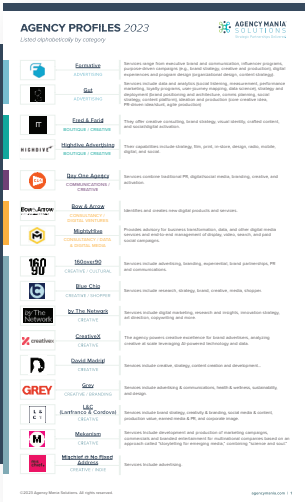
- Drugstore chain **CVS** launched a campaign called “Role Model” with its agency Digitas, meant to highlight the insecurity created for Gen Z viewers by influencers and others on social media, while celebrating the fifth anniversary of its Beauty Mark initiative (which involves putting a “CVS Beauty Mark” watermark on ad images that have not been altered while denoting those that have been changed). The campaign invites the audience to “Tag posts #DigitallyAltered or #BeautyUnaltered.”
- **Mastercard** and **McCann Poland** won the Sustainable Development Goals Grand Prix at the Cannes Lions International Festival of Creativity for their work on the WhereToSettle app. The campaign helped 20% of the 1.5 million Ukrainian families and refugees in Poland find the best opportunities and places to resettle.

**Noteworthy quotes:**

- » “AI isn’t just a promise for the future. It’s available right now.” —Pratik Thakar, Global Head of Creative Strategy and Integrated Content, **Coca-Cola**
- » “AI is a fantastic catalyst. [But] it’s not an answer machine.” —Troy Ruhanen, President and CEO, **TBWA\Worldwide**
- » “While remote work initially offered benefits such as improved work-life balance and increased productivity, concerns have arisen over the abuse of remote work privileges and its impact on interpersonal interactions, cultural cohesion, and relationship-building.” —Sir Martin Sorrell, Executive Chairman, **S4 Capital**
- » “Companies that build a strong foundation of AI by adopting and scaling it now, where the technology is mature and delivers clear value, will be better positioned to reinvent, compete and achieve new levels of performance.” —Julie Sweet, Chair and CEO, **Accenture**
- » “This ecosystem complexity has led to an increase in the importance of agency management and agency operations functions within most client organizations.” —Jim Wallace, Agency Management and Marketing Operations Expert, **Blum Consulting Partners**
- » “If you do nothing unexpected, nothing unexpected happens.” —Matt Weiss, Global President, **Huge**
- » “The balance between flexible working and maintaining economic competitiveness is crucial to avoid a potential decline and embrace the opportunities and challenges of the future.” —Sir Martin Sorrell, Executive Chairman, **S4 Capital**
- » “To do great creative, to do inspiring, optimistic creative, you’ve got to have some fun.” —Tor Myhren, VP of Marketing Communications, **Apple**
- » “A lot of organizations think automation leads to savings, but the goal of automation is to release the human from the robot and create capacity for thought.” —Doug Rozen, CEO, **Dentsu Media Americas**

- » “How does a business leader ensure there is a proper human element as they wade into the AI deep end and build their own strategy? How can you define your own AI philosophy that symbolizes the culture and beliefs you and your peers have built?” —Tracey Pattani, CEO, **Butler, Shine, Stern & Partners**
- » “We are using AI to figure out how we can optimize the creative execution. Pampers has 140 different pieces of creative optimized through this program called AI Studios, which allows us to be able to test ads versus a big database of reactions and figure out how we can make it better.” —Marc Pritchard, Chief Brand Officer, **Procter & Gamble**
- » “Media leaders hold the power to make an impact for the climate and there is plenty they can do now, working with their colleagues in procurement and sustainability to ensure the media function can deliver real impact on direct emissions.” —Rob Rakowitz, Co-Founder, Initiative Lead, the Global Alliance for Responsible Media, **World Federation of Advertisers**
- » “The transformative power of AI has already impacted many aspects of communications, enabling us to better understand our audiences, craft more effective messaging and automate time-consuming tasks. However, we must acknowledge that along with these benefits come potential risks to accuracy, privacy, fairness, transparency and equality.” —Antony Cousins, Executive Director of AI Strategy, **Cision**
- » “Artificial intelligence is great, but there are still humans in the mix. We needed a human-centered engine.” —Mat Baxter, CEO, **Huge**
- » “Almost every advertiser we work with at ID Comms has brought some parts of their media operation in-house to sit closer to their brands and real-time business data and to give them more visibility and control of the process.” —Tom Denford, CEO, **ID Comms Group**

Looking for more?  
 Download our consolidated list of **Agencies Profiled** from our Industry Updates. We share the category they work in and services provided.





- » “It’s not easy to have one of these things in-house because that process of ideation and creation, the process of trying things and having some suspension of disbelief and ignoring your negativity bias, all of that needs to be protected.” —Hiroki Asai, Global Head of Marketing, **Airbnb**
- » “Holding companies have managed to ‘make their numbers’ through this crude and shortsighted way. What they have not been able to do is maintain their client relationships.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “Creative teams can produce the same amount of work with 20% to 30% fewer people when using AI.” —Domenic Colasante, CEO, **2X**
- **Faith** is a London-based, generative AI-focused agency, launched by creative agency VCCP, with the goal to “supercharge the creative process” for clients and as an “accelerator of human creativity and imagination.” The agency relies on a collective of 14 practitioners made up of creatives, technologists, prompt engineers, strategists, and data analysts to cover every aspect of the agency process. The agency was launched with a founding client, Sage, and in partnership with two universities. Faith operates on a generative AI policy based on four principles: “Be Transparent when AI is being used. Be Authentic, fact-check AI-generated content. Be Compliant and break no laws. Be Ethical, only use AI for good.”
- **Rethink** is a Vancouver-based creative agency and one of the largest global independent agencies, with offices in New York, Toronto, Vancouver, and Montréal. The agency, which offers services in strategy, advertising, design, experiential, social, digital, and product innovation, is the Effies’ most effective independent agency in North America; Ad Age’s 2021 Creative Agency of the Year; and the second-ranked independent agency in the world by the 2021 Cannes Lions. The agency is fluent in English and French. Clients include Ikea, Molson, WestJet, Kraft, Coors Light, Heinz, and Scotts.

### Company profiles:

- **Orchard** is a small advertising agency founded in Brooklyn, New York, in 2019 with diversity at the center of its mission. The agency vowed that all female employees would be paid the same as their male counterparts and that it would actively grow the pool of BIPOC candidates in advertising. While pursuing its social mission, Orchard has also produced excellent work, including Super Bowl ads for Oikos Triple Zero and Dashlane. Awards include Ad Age A-List 2023; Adweek Creative 100 2023; Inc. Best in Business 2021: Gold; Ad Age Small Agency Awards 2021; Campaign US Agency of the Year 2020: Independent Agencies; and Campaign Global Agency of the Year 2020: Independent Agencies. Clients include Etsy (newly appointed), Ocean Spray, Champs, Silk, Nike, Google, Target, and Zillow.



**Agency Mania Solutions Founders**  
Bruno Galpois, Teri Wiegman, Shaun Wolfe

## COVER STORY

10 Most Influential  
**COMPANIES**  
OF THE YEAR 2023



**AGENCY MANIA**<sup>SM</sup>  
**SOLUTIONS**

Strategic Partnerships Delivered.

Recently recognized in the **Top 10 Most Influential Companies of 2023**, AMS shares its remarkable journey revolutionizing how brands optimize their agency and supplier relationships. **Read the cover story** for highlights from their visionary leadership team and a future outlook on industry growth and challenges.

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



Plenty of awards are coming out this time of the year, especially Cannes Lions and Effie accolades. It's thrilling to experience the brilliant work produced by agencies and their clients. The most effective marketer of the year was The Kellogg Company (Effie). Apple was the most creative brand of the year (Cannes Lions). A highly complex and rapidly changing advertising ecosystem is contributing to new ways of collaboration with agencies, new standards for media buying and programmatic advertising, improved and more holistic and integrated cross-platform measurement, and, especially in light of recent privacy and data regulations, the role of AI, new and emerging tools and platforms, the evolving TV landscape, and social media measurement.

- Per Interbrand, **Breakthrough Brands 2023** included:

- OpenAI
- Eight Sleep (preferred mattress of the tech-savvy)
- HiPhi (best-selling premium electric vehicle in China)
- Zepeto (avatar-based social network)
- Obsess (virtual reality platform)
- Cake (electric bike company)
- KidSuper (Brooklyn-based creative studio)
- betterhalf (dating app in India)
- Bilt (credit card)
- Sila (battery materials company)

OpenAI ranked high on the list. The company, founded in 2016, launched ChatGPT in November 2022 (gaining 1 million users in five days) and raised \$11.3 billion.

- WPP and its agency **Grey Health & Wellness**, in collaboration with the American Society of Clinical Oncology, captured the first-ever sound of cancer cells being destroyed. The initiative, called "The Most Beautiful Sound," aimed to isolate the sound of breast and lung cancer cells at the precise moment of cellular death.
- Per a **MediaSense "Pitch Smart" study**, 86% of agencies find pitching excessively time and cost exhaustive, and 64% of agency respondents find pitching damaging to agency culture. 64% of agencies claim that pitching is affecting mental health, and 46% are having increasing difficulty in finding people to work on extensive pitches.
- Creative-driven advertising agency **Atlantic New York** introduced a novel concept at the Cannes Lions by operating its own car service and offering free rides between the Nice airport and Cannes to any prospective clients willing to hear the agency's elevator pitch along the way. The agency used humor to engage: "Our time is limited, so please take the bus if you're not currently looking for a new agency."
- In partnership with Ebiquity/FirmDecisions and with input from the China Advertising Association, the World Federation of Advertisers published a new guide on **media agency contracts for the China market** to assist advertisers in navigating unique transparency challenges and addressing the complexities and rapid evolution of the media and marketing landscape.

- The ANA updated its **Master Media Buying Services Template Agreement** for advertisers to use when contracting with media buying agencies in the US. This update addresses key developments in media, including definitions for compliance and performance audits, non-transparent services, AI, ESG and DEI.

### Awards:

- Per the **70th annual Cannes Lions International Festival of Creativity**, WPP's Mindshare was named Media Network of the Year. Omnicom's PHD was runner-up, and GroupM's Wavemaker was third. Network of the Year went to DDB Worldwide. WPP's Ogilvy was runner-up, and Omnicom's BBDO Worldwide was third. Independent Network of the Year was GUT, followed by Wieden + Kennedy and Rethink. Agency of the Year was awarded to GUT Buenos Aires, followed by Publicis Conseil Paris and Omnicom's adam&eveDDB, London. Independent Agency of the Year went to GUT Buenos Aires. Rethink Toronto was second, and Wieden+Kennedy Portland was third. Apple won its first Creative Brand of the Year award, followed by Dove and Heineken. Apple also won a Film Lions Grand Prix for its ad "Relax, it's iPhone—R.I.P. Leon," which was created in-house.
- Also per the **Festival of Creativity**, Grand Prix winners included:
  - Partners Life (Health and Wellness)
  - British Airways (Outdoor)
  - Eurofarma (Pharma)
  - Lebanon (Print and Publishing)
  - Skinny (Radio and Audio)
  - Publicis (Health Grand Prix for Good)
  - Microsoft (Design)
  - Nike (Digital Craft)
  - Clash of Clans (Entertainment and Entertainment Lions for Gaming)
  - Apple (Entertainment Lions for Music)
  - Michelob Ultra (Entertainment Lions for Sport)
  - Kendrick Lamar (Film Craft)
  - Japan Railway (Industry Craft)
  - Planet Earth (Creative B2B)
  - Stella Artois (Creative Data)
  - Adidas (Direct)
  - Dove (Media)
  - DoorDash (PR)
  - Samsung (Social and Influencer)
  - Augmental (Innovation)
  - Microsoft (Creative Business Transformation)
  - Hungerstation (Creative Commerce)
  - Cadbury (Creative Effectiveness)
  - Renault (Creative Strategy)
  - Pedidos Ya (Mobile)
  - EA Sports (Brand Experience and Activation)
  - Korean National Policy Agency (Glass: The Lion for Change)
  - Tuvalu (Titanium)
  - Mastercard (Sustainable Development Goals)
  - Apple (Film)
  - Fondation Anne de Gaulle (Grand Prix for Good)



- **Omnicom** was named Most Creative Company of the Year at the Festival of Creativity. More than 120 agencies from 40 countries contributed to winning the title, with over 175 Lions received throughout the week. Two of Omnicom’s creative networks, DDB and BBDO, placed in the top three of the Network of the Year category, with DDB coming in first (winning 85 Lions) and BBDO in third (55 Lions). Omnicom Media Group collectively contributed 57 total Lions, and PHD Worldwide came in second place for the Media Network of the Year category.
- Per the **2023 Effie Awards**, The Kellogg Company was named Most Effective Marketer; IPG retained its title of Most Effective Holding Company; Mischief @ No Fixed Address was top Independent Agency. The campaign by nonprofit Truth Initiative and independent agency Mojo Supermarket named “Depression Stick + Breath of Stress Air” (with support from agencies Gale, Allegiance Group, and Crux Research) was awarded the Grand Effie. Highest-ranked US Effie winners:

Most Effective Marketers:

- 1) The Kellogg Company
- 2) Unilever
- 3) Mars Wrigley North America

Most Effective Brands:

- 1) Froot Loops
- 2) eos
- 3) Truth Initiative

Most Effective Holding Companies:

- 1) IPG
- 2) Omnicom
- 3) Publicis Groupe

Most Effective Agency Networks:

- 1) DDB Worldwide
- 2) Leo Burnett Worldwide
- 3) McCann Worldgroup

Most Effective Agency Offices:

- 1) Starcom Worldwide
- 2) Leo Burnett Chicago
- 3) Mischief @ No Fixed Address

Most Effective Independent Agencies:

- 1) Mischief @ No Fixed Address
- 2) Mojo Supermarket
- 3) SuperAwesome

- Citi Creative Services was named **In-house Agency of the Year** by the ANA. Aflac and its XP Agency won Best Collaborative Effort for its campaign “The Park Bench.” PepsiCo and its in-house Content Studio won grand prize in the media plan category for its campaign “Coming Home—bubly Celebrates the LGBTQ+ Community’s Safe Spaces,” followed by T-Mobile (“Beyond Coverage”) and L’Oréal (“Urban Decay”).
- At the **ADC 102nd Annual Awards**, MullenLowe US was named Agency of the Year, and The Black Cube for Best of Show was awarded to VMLY&R for its work for Dell Technologies and Intel and its interactive book for people with motor neuron disease.

Noteworthy quotes:

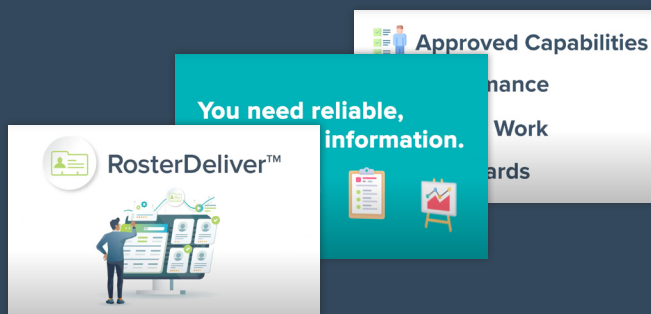
- » “The Goldilocks element is to really figure out how to do high-tech and high-touch marketing.” —Drew Panayiotou, Global CMO, **Pfizer**
- » “Those who asked the right questions will be getting better answers. Faster.” —Troy Ruhanen, President and CEO, **TBWA Worldwide**
- » “I’ve never been part of a truly great creative piece of work that had multiple layers between where the idea is presented and the person who’s buying it. At pretty much every layer, it tends to get worse.” —Tor Myhren, VP, Marketing Communications, **Apple**
- » “Sticking our heads in the sand will neither change this debate nor stop the forward momentum. The genie is out of its bottle.” —Tracey Pattani, CEO, Butler, Shine, **Stern & Partners**
- » “There is far too little new in the industry. Safety in numbers. Rounding down or eliminating warts, the unusual, the atypical, the unexpected usually get whittled down along the way from idea to execution.” —Matt Weiss, Global President, **Huge**
- » “It does not help to acquiesce to micromanaging of the work.” —Marla Kaplowitz, CEO and President, **4A’s**
- » “AI must be centered around empathy and transparency.” —Julianna Richter, Global CEO, **Ogilvy PR**

# Need to manage your Agency Roster?

You already have the right partnerships in place, but do you need to better manage your existing roster of agencies?

There is a better way.

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



- » “Clearly the days of the pitch being this unique opportunity to energize staff and build culture are long gone, with agencies so much more selective about what they pitch for.” —Ryan Kangisser, Managing Partner, Strategy, **MediaSense**
- » “You just have to call it out when it’s bad. Then you have to break down with the team why it wasn’t great. You have to learn from when things aren’t great because if you keep pretending like they are, it never gets better.” —Tor Myhren, VP, Marketing Communications, **Apple**
- » “Secret sauce is, focus on the consumers, focus on what are the consumers’ needs.” —Marc Pritchard, Chief Brand Officer, **Procter & Gamble**
- » “Brands deserve better media. So whether you manage your media with an internal team, an external agency or a healthy blend of both, remember we are all in service of the brands we love, and when brands get the media they deserve they flourish. When brands grow, we all win.” —Tom Denford, CEO, **ID Comms Group**

NEW ARTICLE

## Creating Agency KPIs

Engaging and motivating agency partners is more than a numbers game

 **AGENCY MANIA™ SOLUTIONS**  
Strategic Partnerships Delivered.  
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Check out this new article: “[Creating Agency KPIs: Engaging and motivating agency partners is more than a numbers game.](#)”

### ARTICLE: Point of View: Video Production Timelines

Contributed by: Advertising Production Resources (APR)

APR is often asked, “So how long does it take to shoot a video, such as for a TV commercial with one :60, two :30s, and six :06s?”

While there are many factors unique to a project that will have an impact on production timelines, we provided some guidelines for reasonable timelines in response to a recent ANA member’s question.

Here are some of the common challenges of having too little time, and ‘watchouts’ for activities that may add time to your production schedule.

#### Want to read more?

To read or download the full article please [click here](#).

### WHITE PAPER: Quantifying the Value of the In-House Agencies

Contributed by: Blum Consulting Partners

In-house agencies are not going away.

As brands continue to deal with the challenges of migrating work in-house, defining the mission of the IHA, and looking for ways to show their value to the organization, many IHA’s are struggling to keep up with demands and expectations.

This white paper details the ways in which the IHA can show value to the brand, and demonstrate they are a viable solution by producing work that benefits from being closer to the brand, requires agile production, and depends on a dedicated staff.

#### Want to read more?

Request your copy of the [white paper here](#).

## FINANCIALS: Driving efficient use of resources



Concerns related to inflation and an economic slowdown are now manifesting in practical terms. The Kantar BrandZ 2023 Most Valuable Global Brands report shows that the \$6.9 trillion brand value among the top 100 global brands is under greater pressure, down 20% year-over-year. The forecast for global advertising spend was reduced slightly but still projected to be between 3.3% and 5.9% (based on who you ask) for 2023. Marketing budgets as a percentage of company value went down in 2023. Brand advertisers are diligent about where to invest. Agencies are managing their P&L more tightly as a result.

- Per the **Kantar BrandZ Most Valuable Global Brands** report, which assesses brands' value based on their financial performance and brand equity, tech leads the pack with Apple (\$880.5 billion), Google (\$577.7 billion), Microsoft (\$501.7 billion), and Amazon (\$468.7 billion) capturing the top spots. After those big-name tech companies comes McDonald's (\$191.1 billion). China's Shein and Nongfu Spring joined for the first time. Colgate, Sony, and Pampers returned to the list after dropping off in 2022. Coca-Cola (\$106.1 billion) returned to the top 10 for the first time in seven years. Facebook led the social media platforms at No. 12, followed by Instagram (29), YouTube (34), and TikTok (41).
- Per **Ad Age**, the top 200 US advertisers raised their spending on ad and marketing services by 8% in 2022, reaching a record \$210 billion. Among the 200 biggest advertisers, 133 increased spending in 2022. Fifty-five had total US ad spending greater than \$1 billion. The most advertised brand was Amazon, with \$6.1 billion in US measured media spend. Average US organic growth for the five major agency holding companies—WPP, Publicis, Omnicom, Interpublic, and Dentsu—was 7.6%.
- Per Madison and Wall, **2023 US ad agency revenue** growth (estimated to range between 4.3% and 5.4%) is expected to significantly outpace what brands spend on media.
- Holding company **Dentsu** reduced its 2023 growth forecast for global advertising spend, now projecting a 3.3% increase vs. the original 3.5% estimate, to \$727.9 billion in 2023. The firm expects media price inflation instead of advertising volume to drive growth. At constant prices, Dentsu expected a decline of 0.6% YOY. The firm expects ad spending growth of 4.7%, or \$762.5 billion, in 2024 as a result of the UEFA Euro Championship and the US presidential election.
- WPP-owned agency GroupM expects the **international ad industry** to grow 5.9% in 2023 (total \$874.5 billion), excluding US political advertising, despite concerns about inflation. GroupM reduced its 2022 US growth estimate to 5.7%, from 7.1%, and lowered the full-year 2023 outlook to 5.1% from the earlier estimate of 5.5%. The US growth estimate for 2024 is 5%. China is now expected to grow 7.9%, up from the previous estimate of 6.3%. Digital is still the most dominant advertising channel, forecast to grow 8.4% in 2023 and reach 74.4% of total ad revenue by 2028. Retail media is the third-fastest growing advertising channel in 2023, behind digital out-of-home and connected TV. AI is expected to touch at least half of all advertising revenue in some way by the end of 2023.
- Per the **Gartner 2023 CMO Spend and Strategy Survey**, marketing budgets fell from 9.5% of company revenue in 2022 to 9.1% in 2023. 28% of CMOs' multichannel budgets will be spent on awareness in 2023. 75% of CMOs report being asked to do more with less. 66% changed investments in agencies, people, technology, and media. 75% of CMOs face pressure to cut martech spend. 62% cut investments in continuous improvements and optimization of existing martech solutions.
- Per COMvergence, **GroupM** secured nearly a third of total reviewed media spend in the first quarter of 2023. GroupM ranked first in total new business value of more than \$1 billion and successfully defended an industry-high \$728 million in business. Wavemaker was the #1 agency network, with a total new business value of \$801 million in Q1. The agency successfully defended \$564 million at a retention rate of 88% (vs. the average retention rate of 25%).
- Per Data.ai, **advertising in mobile apps** reached \$336 billion globally in 2022, up 14% YOY. advertising accounted for 66.8% of total 2022 app revenue of \$500 billion. North America accounted for 46% of global mobile ad revenue generated through iOS and Google Play apps.
- Matching service agency **Brief** launched an offering allowing brands to prequalify (within two minutes) for a credit line of up to \$500,000 for upfront agency charges. Advertisers have the option to pay off the credit within two to 12 months under the new product called Brief(Pay), powered by fintech company Tranch.
- Per Gartner, five key actions when creating an **annual marketing budget**:
  - 1) Plan for budgeting process
  - 2) Initiate marketing budget process
  - 3) Revise budget estimates
  - 4) Finalize and communicate marketing budget
  - 5) Monitor budget performance



- Per the ANA, 23%, or \$20 billion out of \$83 billion, in **open programmatic ad spend** is wasted going to ineffective ad placements on bad websites. 15% of programmatic ad spend finds its way to “made for advertising” websites of low quality (featuring fake news, conspiracy theories, or spammy links, and tactics such as pop-up ads, auto-play videos, or intrusive ads), instead of premium inventory.
- At the ANA Advertising Financial Management Conference, **Verizon** shared its approach to agency compensation based on six principles:
  - 1) Fairness and transparency (treat agencies as partners, not vendors or suppliers)
  - 2) Deliverables-based model
  - 3) Incentive compensation (based on select KPIs with the ability to earn payments in excess of 100% of their contracted payment)
  - 4) Built for flexibility
  - 5) Performance feedback (both quantitative and qualitative)
  - 6) Single data platform
- Per New Business Methodology, agencies spend up to 17% of their revenue to cover nonbillable hours spent annually on **pitching**, and agencies spend \$12.46 billion on pitching per year. Per ID Comms, a single pitch for an account worth \$50 million to \$500 million can cost agencies \$120,000.
- Per FYPM’s 2023 **Creator Pricing Benchmark Report**, Walmart, Adobe, Target, McDonald’s, and Nike were ranked as the brands that pay the most for social posts. The median brand deal pricing in 2023 is \$500 for Instagram and \$400 for TikTok, an 18% reduction compared to 2022 across all platforms.

### Holding company financial performance:

- **S4 Capital** reported a net revenue gain of 28.1% in the first quarter, to 219.1 million GBP (about \$274 million), with organic growth of 6.8%. The Americas performed strongly—11% net growth in Q1. Europe, Middle East and Africa net revenue was down 4.7%, and Asia-Pacific declined 9.9%. The company cut staff in Q1 by 200 positions, to 8,700.
- Vivendi-owned **Havas Group** reported a 4.4% net revenue gain in the first quarter, to 588 million euros (about \$640 million), while organic net revenue growth slowed to 1.9%. The group’s North America region posted a 0.3% organic decline, compared to 4% growth in Asia-Pacific and 27.3% growth in Latin America. Havas Group acquired HRZN (a German agency specializing in social media and content) and Noise Digital (a Vancouver-based media performance and data analytics agency). Key account wins in Q1 included Santander (Brazil), BMW (China), and Danone global.

### Mergers and acquisitions (M&A) activity:

- **The Brandtech Group** acquired digital media and marketing group Jellyfish to expand its Web3 and generative AI capabilities and also acquired the world’s top generative AI SaaS platform, Pencil.
- **WPP** acquired a 30% stake in Majority, the small Atlanta agency co-founded by NBA legend Shaquille O’Neal. The agency is focused on “disruptive creativity that moves culture” across disciplines including advertising, strategic planning, digital, branded entertainment, design, product innovation, experiences, art, and activism. Clients include NBA G League and General Motors, and Majority is the creative AOR for Sprite.
- Luxury marketing specialist **Together Group** acquired North Six, an agency with expertise in content production, experiential, and influencer marketing. Clients include Louis Vuitton, Dior, Hennessy, Bulgari, Tiffany & Co., DeBeers, and Montblanc. Together Group’s portfolio of agencies also includes creative shops King & Partners, Noë & Associates, and Construct, strategic activation agencies Purple, Hot Pot China, Seven Dials City, and Folk Commerce, and its consumer-trend and strategic consultancy, The Future Laboratory.
- **Publicis Groupe** acquired 100% ownership of a joint venture formed three years ago among Publicis Sapient, Elder Research, and Tquila, called Publicis Sapient AI Labs, which focuses on artificial intelligence research and development. Publicis Sapient AI Labs is now part of the digital transformation unit Publicis Sapient.
- **Publicis Groupe** acquired Corra, an e-commerce company recognized by Adobe as the top commerce firm in North America. Corra will become part of Publicis Sapient, Publicis Groupe’s digital business transformation company, and will augment Publicis Sapient’s expertise in commerce solutions, including Adobe commerce and Mach Alliance composable commerce solutions. Corra will also add dedicated resources to Publicis Sapient’s SPEED (Strategy, Product, Experience, Engineering, and Data & AI) capabilities.
- Stagwell-owned public affairs and political consulting firm **SKDK** acquired Jasper Advisors, a C-suite advisory firm, which will continue to operate as an independent subsidiary.

### Noteworthy quotes:

- “The economic mood around much of the world seems to be one of impending trouble.”—Kate Scott-Dawkins, Business Intelligence President, **GroupM**
- “Clients have relentlessly cut the fees paid over the past two decades, but the holding companies have survived and increased shareholder value by aggressively downsizing their companies every year to maintain profit margins.”—Michael Farmer, Chairman and CEO, **Farmer & Company**

- “We have to focus on output, deliverables; not get into the minutiae of who is doing the work, the fine details of how many hours people work.”—Marla Kaplowitz, CEO and President, **4A's**
- “The quality of CEO leadership has deteriorated, hijacked by short-term ‘shareholder value’ concerns and corrupted by high CEO compensation levels, which are themselves driven by short-term earnings and share price levels.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- “The growth of nearshoring and offshoring should not be a win for agencies, but rather profit neutral.” —Greg Paull, Co-Founder and Principal, **R3**
- “What will happen to holding company revenues when clients either use AI themselves or force agencies to use AI to lower their headcounts and fees?” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- “AI is going to have profound effects on agency business. And it’s not because somebody doesn’t like an agency. People want things at lower costs and faster, and with quality at a level of parity with what they have now—and that’s starting to happen.” —Norman de Greve, CMO, **CVS**

**Looking to get more value?**

Looking to get more value from your agency investment? There is a better way. Check out our video explainer about **ScopeDeliver.**



**Top 8 Media Agencies Final 2022 Ranking (USA)**

| Media Agencies       | Owner Groups               | Total Billings M\$ 2022 | Digital Billings M\$ 2022 |
|----------------------|----------------------------|-------------------------|---------------------------|
| <b>OMD</b>           | <b>Omnicom Media (OMG)</b> | <b>9 210 M\$</b>        | <b>5 030 M\$</b>          |
| Spark Foundry        | Publicis Media             | 7 906 M\$               | 3 195 M\$                 |
| <b>Horizon Media</b> | <b>Independent</b>         | <b>7 652 M\$</b>        | <b>3 126 M\$</b>          |
| Carat                | Dentsu                     | 7 473 M\$               | 3 481 M\$                 |
| <b>Starcom</b>       | <b>Publicis Media</b>      | <b>6 674 M\$</b>        | <b>2 983 M\$</b>          |
| Zenith               | Publicis Media             | 6 355 M\$               | 2 202 M\$                 |
| <b>Mindshare</b>     | <b>Group M</b>             | <b>5 719 M\$</b>        | <b>3 191 M\$</b>          |
| Mediacom             | Group M                    | 5 304 M\$               | 2 606 M\$                 |

With total net billings of \$9.2B in 2022, OMD remained the top media agency in the US, despite a 5.8% decline compared with 2021, according to COMvergence. Spark Foundry followed with billings of \$7.9B (-3.2%). Independent agency Horizon Media was third with billings of \$7.7B (-9.8%).

**AGENCY: Agency reviews and roster changes**

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

- US passenger railroad service **Amtrak** kicked off a review of its multicultural advertising business, including creative, media, analytics, and account planning to support marketing and advertising, with a focus on digital and social strategies, geared toward Black, Hispanic, Asian American, Pacific Islander, and LGBTQIA+ consumers. Incumbent WPP (VMLY&R for strategy/creative, EssenceMediacom for media) is expected to defend. Culture One World is the agency currently handling crosscultural work for the brand.
- Pharmaceutical giant **Bristol Myers Squibb** selected IPG's Mediabrands to lead US media buying and planning for its DTC brands, replacing incumbent Havas after a review.
- Furniture retailer **Bob's Discount Furniture**, the eighth-largest US furniture retailer, selected Horizon Next, the performance marketing arm of Horizon Media, as its media AOR, following a review. The incumbent was Havas Media. The agency will handle all paid media, including TV, paid social, paid search, digital audio, programmatic, connected TV, and out-of-home.
- **Buffalo Wild Wings** selected Stagwell agency Anomaly as its creative AOR, following a review that replaced five-year incumbent The Martin Agency.
- German skin care giant **Beiersdorf** kicked off a review of its global media business in a push to consolidate its media activities around the world under one holding company. A variety of agencies across holding companies currently handle media: Omnicom's OMD (US and a few other markets), Dentsu's Carat (LATAM and EMEA), and WPP's Wavemaker (Canada, Russia, and others).
- **Constellation Brands** selected Initiative as its media AOR in the US following a review that replaced 14-year incumbent Horizon Media. The agency will focus on data-fueled, creatively driven work amplified by innovation.
- Online craft marketplace **Etsy** selected Brooklyn, New York-based agency Orchard as its creative AOR following a review, replacing Stagwell's 72andSunny, the three-year incumbent.
- Fruity, chewy candy brand **Hi-Chew** selected IPG agencies MullenLowe (as the brand's AOR for social creative) and Carmichael Lynch Media (as paid media AOR).
- **Intuit QuickBooks** selected FCB New York as its global creative AOR for QuickBooks Online, QuickBooks Payroll, QuickBooks Payments, and QuickBooks Time, following a review. The six-year incumbent was TBWA\Chiat\Day. Other offices will handle work in their market: FCB London, FCB Canada, R/GA Australia.
- Furniture producer **La-Z-Boy** selected Stagwell-owned and Minneapolis-based Colle McVoy as its creative AOR. The agency will handle brand strategy, design, public relations, and influencer marketing.
- Pharma giant **Pfizer** selected Publicis Groupe as its "integrated global engine" (combining data and tech, media, and creative production) and Interpublic Group of Cos. as its lead creative partner following a review. Dentsu's Carat was the incumbent on US media, and various agencies handle global media. The brand also selected the New York-based digital outfit Work & Co. without a formal review to handle digital innovation duties.
- **PNC Bank** selected Arnold Worldwide (part of Havas Creative Group) as its integrated marketing and creative AOR following a review, replacing 14-year incumbent Deutsch NY. Havas Media Group will handle media strategy, buying, and planning.
- **Revlon Group** selected Horizon Media to be its media AOR for the US and Canada following a review. The brand previously handled media in-house (after working with Initiative). The agency will handle all brand and performance media for the region and collaborate on consumer loyalty, digital, and data initiatives.
- Automaker giant **Stellantis** North America selected Louisville, Kentucky-based TKT & Associates as its AOR to market to its Black consumer audience following a review. The agency, with expertise in DE&I and supplier diversity consulting, will handle work across brands, including Jeep, Ram, Dodge, Fiat, and Alfa Romeo.
- **T-Mobile** kicked off a review of its creative business, including strategic brand positioning, sponsorship, radio, digital, and Hispanic marketing for the US. The review excludes national brand TV advertising, currently handled by LA-based film production company Panay Films. Incumbent Publicis Groupe and Saatchi & Saatchi are likely to defend.
- **Uber** kicked off a review of its global media account. The selected agency will handle media strategy, planning, and buying services across key markets, including US, Canada, France, Germany, the UK, Japan, Australia, and Mexico. GroupM agency EssenceMediacom is the incumbent.



Agency roster summary:

| COMPANY LOGO  | CLIENT                   | INCUMBENT  | CHANGE/SCOPE                         | FOCUS AREA  | NEW AGENCY                         | REVIEW? |
|---|--------------------------|--|--------------------------------------|-------------|------------------------------------|---------|
|    | Amtrak                   | VMLY&R,<br>EssenceMediacom<br><i>(expected to defend)</i><br>Culture One World | Multicultural Advertising            | US          | Review in Process                  | Y       |
|    | Beiersdorf               | OMD, Carat,<br>Wavemaker   | Media                                | Global      | Review in Process                  | Y       |
|    | Bob's Discount Furniture | Havas Media  | Media AOR                            | US          | Horizon Next                       | Y       |
|    | Bristol Myers Squibb     | Havas  | Media Buying & Planning              | US          | Mediabrand                         | Y       |
|    | Buffalo Wild Wings       | The Martin Agency  | Creative AOR                         | Unk         | Anomaly                            | Y       |
|    | Constellation Brands     | Horizon Media  | Media AOR                            | US          | Initiative                         | Y       |
|    | Etsy                     | 72andSunny   | Creative AOR                         | Unk         | Orchard                            | Y       |
|    | Hi-Chew                  | Unknown  | Social Creative AOR & Paid Media AOR | Unk         | MullenLowe, Carmichael Lynch Media | Unk     |
|    | Intuit QuickBooks        | TBWA/Chiat/Day   | Creative AOR                         | Global      | FCB New York                       | Y       |
|  | La-Z-Boy                 | Unknown  | Creative AOR                         | Unk         | Colle McVoy                        | Unk     |
|  | Pfizer                   | Carat,<br>Various Others   | Creative, Data & Technology, Media   | Global      | Publicis Groupe & IPG              | Y       |
|  | Pfizer                   | Unknown  | Digital                              | Unk         | Work & Co.                         | N       |
|  | PNC Bank                 | Deutsch NY   | Marketing & Creative AOR             | US          | Arnold Worldwide                   | Y       |
|  | Revlon Group             | In-house   | Media AOR                            | US & Canada | Horizon Media                      | Y       |
|  | Stellantis               | Unknown  | AOR                                  | NAM         | TKT & Associates                   | Y       |
|  | T-Mobile                 | Publicis Groupe,<br>Saatchi & Saatchi<br><i>(expected to defend)</i>           | Creative                             | US          | Review in Process                  | Y       |
|  | Uber                     | EssenceMediacom  | Media                                | Global      | Review in Process                  | Y       |

Unk= Unknown

## Agency Mania 2nd Edition now available!

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## Thank you!

Last month AMS hit the 10-year milestone of our company's inception and topped over 70 issues of our industry update!

This would not be possible without the extraordinary commitment and talent of our exceptional team as well as our esteemed clients who have entrusted us with their partnership and collaboration.

We are truly honored to work alongside such remarkable organizations, and we extend our heartfelt appreciation for their unwavering support and belief in our vision.

