

Industry Update

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

March - April 2024 | Volume 75



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Apparel retailer Abercrombie & Fitch selected global creative agency Amplify as its events partner. The agency will handle all immersive events for the brand... **continued on pg. 17**

EXECUTIVE SUMMARY: March - April recap

The agency world has consolidated its talent to streamline operations and simplify how clients interact or leverage integrated offerings. WPP is a prime example: Last year, WPP merged its creative agencies Wunderman Thompson and VMLY&R to form VML. Then WPP merged two of its largest communication agencies, Hill & Knowlton and BCW, to form Burson. Now, WPP has merged The&Partnership with mSix&Partners to form an AI-centric agency under the new global brand T&Pm.

Major holding companies are transforming from being advertising centric or “platform based” to becoming “intelligent systems” companies, buying complementary agency offerings, heavily investing in R&D, AI, and other proprietary technological innovations, and forming strategic partnerships with tech giants.

Publicis Groupe announced it is investing 300 million euros to strengthen its AI capabilities and is leveraging past acquisitions like data giant Epsilon and digital transformation firm Sapient. Similarly, WPP announced AI investments for training, recruitment, licenses, IT software, and cloud infrastructure.

The race is on as other martech players like Microsoft, Adobe, Salesforce, and Google invest significant human and capital resources to take a lead in this growing area. AI remains the topic du jour. Check out our expanded section on AI developments.



Bruno Galpois
Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources



How often have you heard or read this? “We regularly evaluate our agency and media partners to ensure we have the best go-to-market strategy for our brand. As part of our standard process, we have decided to put our creative and media assignment in review.” Reviews are expected to be on the rise this year, fueled by tighter economic conditions and brands looking to cut costs, as well as aspirations requiring new skills and a reassessment of existing rosters. Some brands implement flexible agency models, mixing project-based work and selecting AORs for major assignments, or specific divisions or brands. P&G’s “fixed and flow” model enables the brand to leverage its primary AOR while also allowing for frequent projects by new and/or small agencies.

- Independent agency **Wieden+Kennedy** laid off 20% of its Portland staff as part of a large restructuring. Other agencies have been laying off middle-level and senior staff as well due to restructuring, resource consolidation and mergers, efficiency initiatives, shrinking client budgets and the shift to project work, which makes it harder to plan and manage financial resources than does retainer work.
- Production company Tool created a 60-second spot for **Under Armour** using AI, VFX and licensed footage—only leveraging existing brand assets like images and recordings and not having to conduct a shoot. Production companies are moving away from traditional techniques and live shoots, increasingly relying on technology to produce content.
- As agencies struggle with the limitations of a time-based revenue model, some are pursuing “alternative compensation structures that prioritize value, performance, and outcomes.” Per Brian Kessman, founder and principal consultant of Lodestar Agency Consulting, three agencies successfully built **value-led, timesheet-free agencies**: Hard Numbers, Bullish, and Fig.
- At the **45th International Advertising Association World Congress**, Laura Maness, global CEO of Grey, shared her perspective on how the value exchange between companies and their partners needs to evolve through a shift toward holistic responsibility, proposing we re-code AOR from “agency of record” to “agents of responsibility.”
- Per Brett Banker, co-founder of X&O, agencies should consider four nontraditional **strategies to work smarter, faster and cheaper** with their clients:
 - 1) Create a client-facing senior team
 - 2) Match teams to the challenge
 - 3) Build efficient teams
 - 4) Embrace fractional talent
- Per BetterBriefs, 51% of marketers have never been trained in **brief writing**. 80% of marketers think that they are good at writing briefs. Only 10% of creative agencies agree.
- Marketing agency Edelman and the National Innovation Centre for Ageing launched the London-based **Longevity Lab** for brands targeting consumers 55 and older, offering them data and insights, on-call creative strategy and marketing consultation, and bespoke intelligence on aging and healthy longevity.

- Two key takeaways from the **2024 Adobe Summit** in Las Vegas:

- 1) Adobe launched the first integration of Firefly generative AI capabilities into Substance 3D Sampler and Stager.
 - 2) Adobe unveiled CXM capabilities with Adobe Experience Platform AI Assistant, Adobe Real-Time Customer Data Platform and Adobe Journey Optimizer, Federated Audience Composition, Adobe GenStudio (generative AI-first offering for marketers to quickly plan, create, manage, activate, and measure on-brand content, with native integrations across Adobe Experience Cloud and Creative Cloud) and Firefly Services (to unlock content production at scale and specific to a brand’s unique needs). Adobe achieved revenue of \$5.18 billion in its first quarter of fiscal year 2024, an 11% increase YOY.
- **The Network**, an independent agency network with 750+ creatives around the world that is known for building custom global teams that tap into local creative specialisms, gathered as a creative network in Margate, UK, to identify ways to serve clients such as Carlsberg and Prime Video while evolving their operating model.

New agencies or capabilities, restructurings, and reorganizations:

- New creative agency **ReadyMade Company** (readymadeco.com) launched with a focus on creativity and innovation, combining products, content, and experiences. The agency offers services in product design, next-gen narrative, creativity workshops, cognitive UX, innovative communication strategy, business positioning and brand narrative development, and post-truth media training by leveraging behavioral science “to help clients communicate in an era of skepticism and misinformation.”
- New York-based creative marketing agency **Unrestricted Free Agency (UFA)** recently launched to support small to medium-size brands with \$100 million to \$500 million in annual revenue. Services range from strategy and creativity to integrated marketing work.
- New Los Angeles-based agency **Someplace** was launched recently by former Wieden+Kennedy leaders in creative and media, offering services including brand and creative strategy, brand identity and design, creative development, production, and media and communication strategy. Clients include sports apparel, fashion, and mobile sports betting brands.
- WPP-owned **Ogilvy’s** consulting arm launched a dedicated tech practice to help major technology brands advertise their offering and build their brands more effectively. Led by David Webster (formerly of McCann and Microsoft), the consulting practice is “borrowing from traditional brand marketing in order to develop effective advertising strategies for tech companies.”

- **WPP** agency Grey merged its capabilities with AKQA across five markets—Italy, Belgium, China, the United Arab Emirates, and Australia—in an efficiency drive to focus on its core high-growth territories and minimize role duplication. In total, the AKQA Group has 50 studios in 30 countries with 5,500 employees.
- WPP combined global creative network **The&Partnership** with its media buying and planning agency **mSix&Partners** to create a fully integrated agency with AI at its heart, under the new global brand T&Pm. The combined entity is now 1,900 people, spanning four continents with 45 offices worldwide and is expected to “connect talent and tech to fuel brand growth.” Clients include EA, easyJet, Tommy Hilfiger, Mars, Toyota, NatWest, TELUS, and News Corp.
- **WPP’s VML** further consolidated its operation in Canada. Agency network Taxi is merging with Wunderman Thompson Canada to form VML Canada.
- **WPP** merged its two largest communication agencies, Hill & Knowlton and BCW, to form **Burson** (6,000 employees in 43 markets worldwide) to help brand clients build and protect their reputation via the agency’s strategic communication, advisory, and public affairs services.
- **Dentsu** reorganized its data and technology operations, hiring Merkle’s chief data and technology officer, Shirli Zelcer, to the lead the function, aimed at fueling data-driven innovation across the three core practice areas of media, customer experience marketing, and creative.
- Two large independent ad agencies, Barkley and OKRP, merged to become **BarkleyOKRP**, now one of the largest strategy and creative indie shops in the US with five offices (Chicago, Kansas City, Missouri, Denver, New York, and Pittsburgh) and 650 employees. The combined client roster includes Metro (T-Mobile), Burger King, Motel 6, AMC, Planet Fitness, and Premier Protein.
- Five agencies—AMP Agency, Upshot, Hatch, Genome, and SmallTalk—consolidated into a new integrated marketing agency called **AMP**, with offices in New York, Boston, Chicago, Los Angeles, San Francisco, and Seattle. The combined entity’s services include digital marketing, brand creative and design, data, performance media, content production, and media buying and planning. Clients include Constellation Brands, P&G, Capital One, BF Goodrich, Meta, LinkedIn, Southwest Airlines, Zillow, and Zappos.
- **Stagwell** launched its “Unlock Surveys,” a new global research community that its agencies and clients can tap to conduct real-time surveys with verified consumers across international markets, as part of its Stagwell Marketing Cloud suite of marketing and research tools.
- Stagwell media agency **Assembly** restructured its North America operations with several promotions and a shift to geographical and industry sector units that are being defined as “assemblies” to better serve clients.
- **Interpublic Group (IPG)** merged Minneapolis-based Carmichael Lynch and Philadelphia-based Tierney to form a single entity, Carmichael Lynch, in a move to streamline its agency roster and combine talent for clients like Subaru, Sherwin-Williams, Comcast, McDonald’s, Choice Hotels, and TD Bank.
- **Gut** launched São Paulo-based Gut Design, adding design and craft services based on its “Beauty Inside Out Principle” approach, outside of its core creative service business offering and making them available across the network’s offices in LA, Miami, Buenos Aires, Toronto, Mexico City, and Amsterdam.

AI (artificial intelligence):

- Spanish artist Alicia Framis is the first woman to marry an **AI-generated hologram** as part of a project called Hybrid Couple. The husband, named AILex, was created with holographic technology and machine learning. The artist wants to experiment with the boundaries of love, intimacy, and identity in the age of AI.
- Per Forbes, **popular AI tech and tools for advertisers** include:
 - 1) CreativeX (previously Picasso Labs)
 - 2) AdCreative AI
 - 3) Alison.ai
 - 4) Pencil (by Brandtech Group)
- **Publicis Groupe** announced it will invest \$326 million in AI in the next three years as it introduced CoreAI to enhance employee workflows across creative, media, software, operations, and insights. CoreAI’s core value proposition is “Superpower our people to turbocharge our clients’ growth.” The “intelligent system company” now combines Publicis’s proprietary data (with 2.3 billion consumer profiles and trillions of data points about content, media, and business performance) and other group assets from Marcel, Publicis Sapient, and Epsilon to enable data optimization, audience creation, content personalization, and people management.
- **IPG** announced its first-to-market partnership with Adobe by integrating Adobe’s generative AI-driven platform GenStudio into its own martech platform. The new operating system, called IPG Engine, is powered by Adobe’s GenStudio suite of AI tools as well as by IPG Acxiom’s identity resolution assets, other tools and data, and client customer data.
- Per **Gartner**, 80% of senior creative roles will be tasked with harnessing generative AI by 2026 and 60% of CMOs will adopt specific technologies to protect their brands from generative AI-driven deception. Other predictions: By 2025, a perceived decay in social media quality (misinformation, toxic user bases, fake accounts, bots) will push 50% of consumers to significantly limit interactions with social media major platforms. By 2027, 20% of brands will differentiate themselves as “AI-free” in their business and products. By 2028, AI-powered search will reduce brands’ organic site traffic by 50% or more.

- The Association of National Advertisers launched its **2024 ANA AI for Marketers Conference** in early April in Hollywood, Florida, and remotely, a newly created event, presented by Resonate. It assembled some of the industry's best experts to explore use case opportunities marketers are pursuing in applying AI and addressed issues involving governance, ethics, and intellectual property.
- Per the 4A's, **favorite AI tools** based on the 2024 CES were:
 - 1) Stagwell Smart Assets—a GenAI platform capable of automatically analyzing, categorizing, and managing creative advertising assets
 - 2) L'Oréal Beauty Genius—an AI-powered virtual beauty advisor
 - 3) Mastercard Small Business AI—a new AI-powered initiative to support small business owners globally with personalized guidance
- The World Federation of Advertisers (WFA) published its **Generative AI Primer**, which discusses opportunities and challenges of generative AI in marketing and provides practical recommendations for how brands can leverage AI while mitigating legal, ethical, and reputational risk. WFA also launched its AI Task Force to help brands develop solutions to propel safe and suitable use of AI across the industry.
- **Sympler**, an AI-enabled research platform, launched new capabilities to turbo-charge best practices in qualitative research and scale it for far better cost efficiencies and outcomes, by leveraging bots at scale serving as one-on-one moderators. The firm created a private, unbiased social chat “confessional” yielding powerful auto-ethnographic intel with hundreds of participants.
- Winterberry Group launched its **The New Creative Paradigm: How AI is Transforming Video and Content Production** white paper, commissioned by Advertising Production Resources (APR). Generative AI typically includes concepting/ideation, creative development, content creation, and copywriting (translation, voice, music, talent). Machine learning comprises creative intelligence, measurement and attribution, channel selection (to inform creative), optimization (activation only), and versioning/iterations for campaigns and reformatting/resizing for channels.
- **Lego** admitted involuntarily posting AI-generated images as part a “test” that happened outside its usual approval processes and was in violation of its company policy to not use generative AI to create Lego content.
- **Pereira O'Dell**, an affiliate of Munich-based holding company Serviceplan, launched a San Francisco-based AI innovation and incubation lab to develop new capabilities and services centered on AI-powered media, data, optimization, creative, customer experience design, and operations.
- **Stagwell agency Gale** crafted a response to an RFP in 90 minutes, with the help from an AI bot named BRAD, short for “Business Resource Access Data-bot” (referencing CEO Brad Smith). BRAD speeds up the creation of capabilities summary, case studies, creative process documentation, and other key RFP type answers. Per Adweek, BRAD is part of its proprietary Alchemy.AI enterprise cloud platform, which software media planners engage to uncover audience insights and segments.
- **Google** launched its first of many Gemini integrations for Google Ads to help brands create optimized search campaigns by generating relevant ad content, including creative (images, headlines, descriptions) and keywords. All images created with generative AI in Google Ads will be invisibly watermarked with DeepMind-powered SynthID.

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.

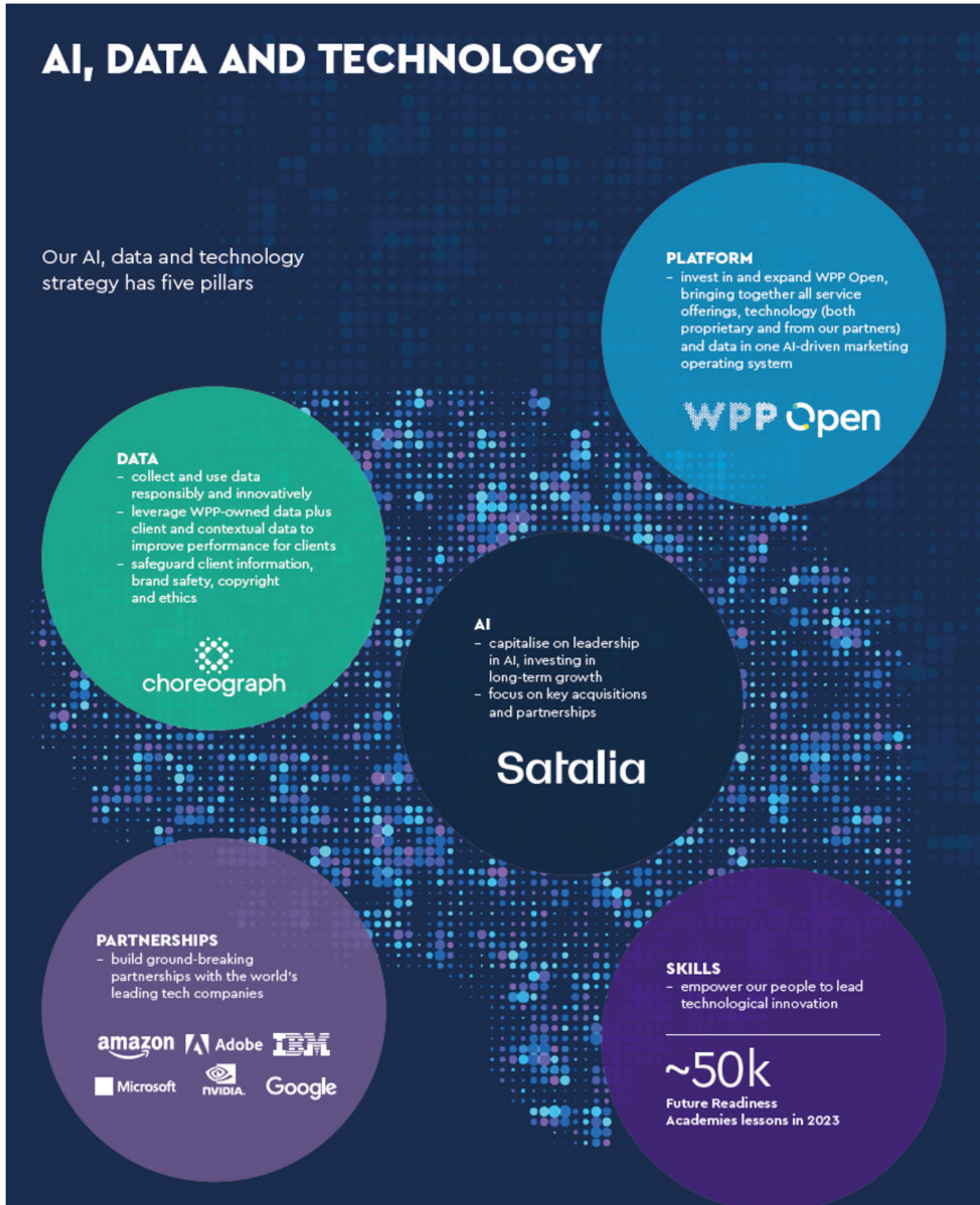
Check out our video about **RosterDeliver**.

Approved Capabilities

You need reliable, information.

RosterDeliver™

WPP announced it will invest nearly \$318 million annually in AI technology while introducing capabilities of its AI platform, WPP Open, and driving \$221 million in savings through “efficiency opportunities” across its back office. The following graphic describes WPP’s approach:



Source: WPP Annual Report & Accounts 2023

- **WPP** is to capitalize on an AI leadership position built on: the acquisition of Satalia in 2021; organic investment in AI, client-facing technology, and data; and deep partnerships, including with Adobe, Google, IBM, Meta, Microsoft, and NVIDIA. An ongoing annual investment of £250 million in data and technology to support WPP's AI strategy is in its 2024 financial plans. Its AI-powered marketing operating system, WPP Open, shares the latest innovations across all of WPP. In 2023 the firm launched WPP Open 2.0 and introduced WPP Brains (WPP Brand Brain: brand guidelines and tone of voice; WPP Audience Brain: specific audience groups, mindsets, and demographic data; WPP Performance Brain: business and channel performance data; WPP Channel Brain: performance and variation of channels), which are all bespoke AI models trained in specific competencies to help provide highly targeted solutions for clients.
- Per the ANA's annual Diversity Report for the Advertising/Marketing Industry, published in partnership with the ANA's AIMM and SeeHer divisions, **people of color** made up 30.8% of the marketing industry in 2023, down from an all-time high of 32.3% in 2022. The report noted that Hispanic/Latino employee representation "declined dramatically" in 2023, down 1.4 points to 9.5%.
- **Omnicom Group's GSD&M** launched an advisory committee to help drive change for diverse-owned vendors through consulting and collaborating with GSD&M leadership and providing guidance on supplier diversity issues, organizational matters, and strategies for sustainable development and growth of small and diverse businesses.
- Giant media buyer **GroupM** committed to doubling ad spending on women's sports programming, forming a marketplace dedicated to women's sports. GroupM will be looking for first-look and first-to-market opportunities beginning with the 2024-25 upfront, with clients such as Adidas, Ally, Coinbase, Discovery, Google, Mars, Nationwide, Unilever, and Universal Pictures participating.

In-house agencies:

- Five out of 56 ads were produced in-house for the Super Bowl in 2024. Per Ad Age, **top Super Bowl ads** (ranked based on performance) that were produced by in-house teams:
 - #31 Snap "Less Social Media. More Snapchat"
 - #43 CrowdStrike "The Future"
 - #50 Skechers "Mr. T in Skechers"
 - #53 Bass Pro Shops "Making Memories on the Water"
 - #55 Squarespace "Hello Down There"
 - #56 Temu "Shop Like a Billionaire"

Per Ad Age, those were not top performers compared to ads produced by outside agencies.

- Pharmaceutical giant **Bayer** partnered with the Oliver agency to bring production in-house and build a world-class production capability within the business, while partnering with external AORs.
- **Wolverine Worldwide** expanded the range of services of its 50-employee in-house agency, called The Agency. It handles brand, creative, and digital work, as well as production services and PR across all brands, including Chaco, Hush Puppies, Merrell, Saucony, and Work Group.

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

- Per the ANA's Alliance for Inclusive and Multicultural Marketing (AIMM), **investment in diverse-owned media** made up 2.5% of total ad spend in 2023, a \$1.9 billion increase YOY. Black-owned media received the highest total investment, followed by Asian-owned media. Per the study, Black-owned media spend increased by 6% (reaching \$991 million), and Hispanic-owned media spend increased by 4% (\$223 million).

Noteworthy quotes:

- » "The greatest creative agency in the world [Wieden + Kennedy] coughing up 20% of staff from its home office is a 5-alarm fire for the creative (and broader!) agency landscape." —Steve Boehler, Founder, **Mercer Island Group**
- » "Once marketers get visibility on its impact [AI], we'll start seeing changes in scopes of work and value." —Greg Paull, Principal and Co-founder, **R3**
- » "A lot of agency people were spending too much effort thinking about the time spent or hours required in the future, chasing timesheets, and reporting at a hugely detailed level, but what we were missing were the key facts: is the work getting done on time when clients needed it actually to get done?" —Richard Tan, CFO and Partner, **Fig**
- » "AI will be fundamental for our business and we are embracing the opportunities that it presents, putting it at the heart of our operations and our work for clients. Our AI-powered platform, WPP Open, is now being used by more than 30,000 people across WPP with growing adoption by our clients." —Mark Read, CEO, **WPP**
- » "We're looking to eliminate our dependency on external agencies to foster a more streamlined and cost-effective approach to our creative development." —Kelly Warkentien, VP Creative Director, **Wolverine Worldwide**
- » "The path to becoming a world-class in-house agency involves more than just excelling in these areas; it's about embodying them in your agency's DNA and then capturing the data and measurements to validate the transformation." —Corey O'Brien, VP, **Aquent Studios**

- » “AI is going to automate some tasks, but it’s going to create a whole new range of jobs that we didn’t have before.” —Mark Read, CEO, **WPP**
- » “Selecting an agency is an emotional decision based on the people and a belief that they are the right group to partner with to achieve your objectives.” —Marla Kaplowitz, CEO and President, **4A’s**
- » “Several of the biggest stories dominating the trades for the past 24 months have been a complaint-fest about clients (they are stealing our ideas, expecting too much, pitches suck, etc.). An industry can’t come across as hating its clients and expect love in return.” —Steve Boehler, Founder, **Mercer Island Group**
- » “Marketing needs to slow down and use more deliberate methods for creating and executing its scopes of work. Today’s complex scopes of work, created to ‘cover all possible media bases,’ need to be critically examined, simplified, and refocused.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “Many agencies say they get hired for great breakthrough thinking, and that might be true, but the ones that use billable time are ultimately paid for the hours it takes to create outputs, and therefore, there is no correlation to the outcomes.” —Michael Duda, Co-Founder and Managing Partner, **Bullish**
- » “We continue to hear of challenges for some agencies regarding the ability of marketers to commit beyond a short-term view and that creates instability for some as they manage costs. An increase in project-based work vs. retainer reinforces the challenges of forecasting and planning for long-term needs.” —Marla Kaplowitz, CEO and President, **4A’s**
- » “The beauty of the creative mind is that it isn’t indoctrinated. It approaches things from a naive place of curiosity, wonder and possibility. The intellectual mind is informed, calculated and filled with insight.” —Jamie King, Partner, **Camp + King**
- » “The world of in-house creative agencies is witnessing a paradigm shift, one that calls for a transition from tactical efficiency to transformational creativity.” —Corey O’Brien, VP, **Aquent Studios**
- » “The power of GenAI is undeniable. The ability to automate highly personalized and relevant content is now seemingly at your fingertips.” —Margaret Wagner, President, EMEA, **Merkle**
- » “AI is at the service of our people, AI is going to superpower our people, AI is going to help our people grow and be better.” —Arthur Sadoun, CEO, **Publicis Groupe**
- » “Marketers and agencies are in desperate need of a lingua franca, a common language that bridges perspectives and aligns ambitions.” —Elizabeth Paul, EVP/Chief Brand Officer, **The Martin Agency**



Check out our article, “**A CMO’s Wake-up Call: not Who but How**”: Why CMOs must shift their mindset and focus from “Which agencies should I hire?” to “How can I operate to embolden agencies to succeed?”—no matter whom a brand partners with.

Company profiles:

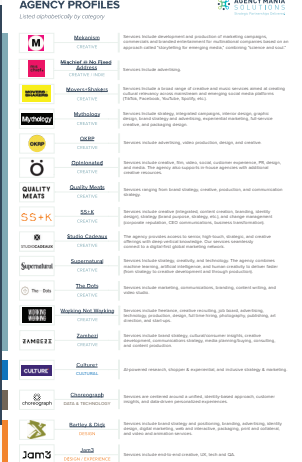
- **Bakery (bakery.agency)** is an Austin, Texas-based, certified minority-owned creative and culture agency founded by Dominican immigrant Micky Ogando and “designed to ignite brand obsession.” The agency handles a wide range of services (creative, website design, digital consulting, media consulting, social media planning, UI/UX design, branding, rebranding, packaging, business strategy, video content, product development, product innovation, and brand strategy) for brands such as NatureSweet, DeLorean, Shiner Beer, Bud Light, Diageo, T-Mobile, Audi, and Nike. The agency was a Best Place to Work in 2020 and an Ad Age Small Agency of the Year (Southwest, Silver) in 2022.
- **Kinesso (kinesso.com)** is a New York-based, IPG MediaBrands-owned, tech-driven performance agency “unifying the complex nature of a brand’s media, data, audience, analytics, and creative architecture.” Kinesso has brought together the collective power of what was formerly Matterkind, Reprise, and Kinesso. Services include audience development, digital experience, search, social, programmatic, commerce, addressable content, curated marketplaces, platforms and intelligence, and AI solutions. Kinesso was named MediaPost’s Media Agency of the Year for 2023. The company has more than 6,000 employees in more than 60 countries.

- **Acadia (acadia.io)** is an Atlanta-based independent digital agency and digital marketing platform with expertise in retail media and marketplaces (Amazon Paid Advertising Management Services, Instacart Advertising Management, Amazon DSP, etc.), analytics and intelligence (data warehousing, dashboarding, customer segmentation, ShopFluency, etc.), paid media, SEO, CRO, and full-service social media and influencer marketing. Clients include Godiva, Just water, 7-Eleven, and California Pizza Kitchen. The agency, which has 225+ employees, recently was named 2024 Ad Age Performance Marketing Agency of the Year and also was 2022 Ad Age Small Agency of the Year and 2023 MediaPost Independent Agency of the Year. The agency is an Amazon Ads Advanced Partner, a Google Premier Partner, and a 2023 US Search Awards Finalist.

Looking for more?

Download our consolidated list of **Agencies Profiled** from our Industry Updates.

We share the category they work in and services provided.





"The agency relationship takes nurturing and a unique appreciation for what each party brings to the table. It takes practice, rigor, and diligence."

BRUNO GRALPOIS,
Co-founder and Principal at Agency Mania Solutions

agencymania.com



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



Big sports events are a great opportunity to grab increasingly hard to reach consumers and produce top-notch creative. Super Bowl LVIII didn't disappoint. It was the most-watched big game in history with an audience of 123.4 to 126.6 million (based on what source you rely on) across the broadcasts on CBS, Nickelodeon, Paramount+, and Univision. This type of large-scale event always highlights innovation in commercial production as advertisers look beyond traditional film and leverage cutting-edge technology and production capabilities. A few advertisers proudly used their in-house agencies to produce their commercials: Google Pixel 8 "Javier in Frame"; CrowdStrike "The Future"; Skechers "Mr. T in Skechers"; Bass Pro Shops "Making Memories on the Water"; Squarespace "Hello Down There"; and Snap "Less Social Media. More Snapchat." The majority, however, relied on their creative AORs to produce remarkable work, like State Farm's "Like a Good Neighbaaa" and Dunkin's "The DunKings."

- Nonprofit **Change the Ref** launched "**The Shotline**" (theshotline.org), a campaign using consensual AI deepfakes to send reconstructed audio of five shooting victims to apply gun reform pressure on US policymakers. Machine learning technology digested real audio recordings of the slain individuals, then constructed new speech in the sounds of their voices with the permission of their families.
- Per ANA's on-demand training course "Inspiring Great Creative," **seven tips for giving agencies feedback**:
 - 1) Be transparent
 - 2) Be direct
 - 3) Don't make it personal
 - 4) Supply a rationale
 - 5) Don't mix and match
 - 6) Don't try to do the agency's work
 - 7) Ask for a next-steps report
- Per Ad Age, Unilever's Dove and L'Oréal's CeraVe both used WPP's Ogilvy for their Super Bowl ads, indicating that **agency conflict policies** have evolved and loosened in recent years to allow competitive brands to use the same agency resources, even for high-profile assignments like the Super Bowl.
- Per the ANA and its on-demand agency management training course, key elements of a successful **agency brief** include:
 - 1) The target audience and relevant customer insights, which specify whom the effort is endeavoring to engage
 - 2) Brief essentials and mandates, which should include general information about the project and the guardrails, such as necessary legal signoffs and image use requirements, as well as required vendors, time dependencies, and privacy policies
 - 3) Budget parameters, which might designate a specific number or a range, but which must be specific enough to prevent the agency from coming up with ideas that the client can't afford to execute
 - 4) Intelligence on the competitive landscape and marketing conditions
 - 5) The business and marketing objectives
- 6) The communication strategy, which should identify how consumers currently feel about the brand, the proposition for them, what the advertiser wants the audience to think, feel, or do, and the "right to believe," i.e., why the target audience should believe what's being communicated to them
- 7) Success metrics; that is, the KPIs on the basis of which the effort's success will be judged,
- 8) Approvals and signatories, identifying which stakeholders will be invited to give input but designating one final decision-maker
- **Washington's Lottery** leveraged AI technology in a campaign created by WPP agency VML Seattle in partnership with AI-focused production studio Secret Level. They used generative AI across multiple outputs—TV, social, outdoor, and interactive mobile—to place actors playing lottery winners in exotic destinations. However, the campaign's AI-generated web app was taken down in April following complaints related to inappropriate image generation.
- **Honda** leveraged generative AI technology to create custom videos on Amazon.com for consumers interested in its new electric Prologue SUV using its "Honda Dream Generator" developed in partnership with Amazon Ads' Brand Innovation Lab. Consumers can choose the driver, things to pack, and other variables for a 2-minute video.
- Per the **2023 Gartner Technology Marketing Benchmarks Survey**, large technology marketers indicated that PPC advertising and SEO are two of the top five-performing channels for generating marketing qualified leads.
- Reckitt cold-and-flu brand **Mucinex** used Getty Images Generative AI as a key component in an interactive brand campaign, expanding the AI-generated mascot, Mucus Masher, and its online game, which "lets consumers crush Mr. Mucus with houses, whales, skyscrapers, planets, bulldozers or any other object from Getty's huge image library."
- As part of a brand campaign that includes a 30-second commercial, **Burger King** took ideas from fans using AI to visualize their dream recipes for how to top a Whopper as part of "The Million Dollar Whopper Contest," which has a \$1 million prize. Developed with Media.Monks and leveraging AI platform Stable Diffusion, consumers are invited to build their burger on a microsite, with the option to add between three and eight toppings with an AI companion named "Grilliam," which generates a downloadable image of the creation.
- A **Coke Zero Sugar** campaign, developed in collaboration with WPP's dedicated Coke agency, Open X, led by AKQA and Ogilvy, used AI as part of an expansion of its "Best Coke Ever?" theme. The AI-based neural network object detection system helped identify letters within the bubbles, condensation, and fizz of a Coke Zero, and used those in advertising work.
- Per Jamie King, partner at Camp + King, **how creative disagreements can benefit** agencies and their clients:
 - 1) It gives creative and intellectual minds equal influence
 - 2) It strengthens the voices of an organization
 - 3) It fuels innovation
 - 4) Proactive disagreement discourages conflict

Awards:

- AdWeek named **Mediahub** (part of IPG Mediabrands) 2024 US Media Agency of the Year. Until recently, the agency was a subsidiary of IPG's creative network, MullenLowe Group, before joining the holding company's media network, IPG Mediabrands. The agency grew by 5% YOY in 2023 and brought in new billings worth \$240 million across 14 new client engagements.
 - Ad Age named **IPG Mediabrands' global agency UM** its 2024 Media Agency of the Year, recognizing the firm's leadership role in retail and commerce. UM increased revenue by 3% in 2023, to approximately \$530 million to \$540 million. UM Commerce, an in-house unit devoted to retail media investment, increased billings from \$1 billion to more than \$2 billion in 2023. The firm launched Shoptimizer, a tool that automates planning, buying, and analysis of retail media buys. Recent client wins include Geico and General Mills.
 - Ad Age named its 2024 Creative Agency of the Year: **Mischief @ No Fixed Address**. Clients include Tinder, Tubi, Coors Light, Peet's Coffee, Chili's, Capri Sun, eos, Anytime Fitness, Heinz, Jell-O, Lunchables, and Pfizer. The agency won the same award in 2022. Revenue was up by 31% in 2023, as Mischief signed up 19 new brands and experienced a 67% increase in organic growth from current clients.
 - Ad Age named its 2024 Production Company (traditional/digital/experiential) A-List winners: **Smuggler** is Production Company of the Year, followed by Somesuch, Biscuit Filmworks, The Mayda Creative Co., O Positive, Hungry Man, MJZ, m ss ng p eces, Park Pictures, and Prettybird.
 - MediaPost's Search/Performance Agency of The Year: **iProspect**. The holding company Dentsu merged Merkle's media capabilities into iProspect, a performance creative agency, which accounts for 600 US-based paid and organic search-marketing professionals handling more than \$2 billion in search media.
 - AdForum launched its annual **PHNX Awards** event (adforum.com/phnx), considered one of the biggest and most diverse gatherings of industry talent in advertising, design, digital, strategy, good causes, and more (preceding the Cannes Lions). There are no entry fees until the shortlist.
 - **Stagwell's** agencies have been honored by Ad Age and named to their A-List and Creativity Awards with four key wins: Code and Theory, Business Transformation Agency of the Year; 72andSunny, A-List; Team Epiphany, Standout Agency of the Year; and Colle McVoy, Standout Agency of the Year.
 - Per the **WARC Creative 100**, the top-ranked media campaign is "Phone It In" from PHD Auckland/Colenso BBDO Auckland for New Zealand telecommunications provider Skinny, followed by "Pre-Loved Island" by EssenceMediacom London/McCann London for eBay to change perceptions of secondhand clothing, and #TurnYourBack by Ogilvy London for Dove, which was developed to protest a TikTok filter (called Bold Glamour) for perpetuating unrealistic standards of beauty.
- Mindshare New York was the top-ranked media agency, followed by PHD Auckland in second place and MediaPlus Munich in third. PHD was the top-ranked global media network, followed by Mindshare Worldwide and EssenceMediacom. PP was the top-ranked holding company for media, followed by Omnicom and Interpublic, respectively. Dove was the top-ranked brand.
- Per **USA Today's Super Bowl Ad Meter** (which relies on the public to rate ads online), the top Super Bowl spot was State Farm's "Like a Good Neighbaaa" featuring Arnold Schwarzenegger and Danny DeVito, with 4.5 stars out of 5, followed by Dunkin's "The DunKings," featuring Ben Affleck, Matt Damon, Tom Brady, Jack Harlow, and Jennifer Lopez.
 - Per Ad Age, **top Super Bowl ads** were (ranked based on performance):
 - 1) CeraVe "Michael CeraVe" (Agency: Ogilvy PR North America)
 - 2) Dunkin' "The DunKings" (Agency: Artists Equity)
 - 3) Google Pixel 8 "Javier in Frame" (Agency: In-house, Gut Miami)
 - 4) NFL "Born to Play" (Agency: 72andSunny)
 - 5) Reese's "Yes!" (Agency: Erich & Kallman)
 - 6) Verizon "Can't B Broken" (Agency: Ogilvy)
 - 7) Volkswagen "An American Love Story" (Agency: Johannes Leonardo)
 - 8) BMW "Talkin' Like Walken" (Agency: Goodby Silverstein & Partners)
 - 9) Dove "Hard Knocks" (Agency: Ogilvy)
 - 10) Poppi "The Future of Soda Is Now" (Agency: Virtue Worldwide)
 - 11) State Farm "Like a Good Neighbaaa" (Agency: Highdive)
 - 12) DoorDash "DoorDash All the Ads" (Agency: Wieden+Kennedy)
 - 13) Doritos "Dina & Mita" (Agency: Goodby Silverstein & Partners)
 - 14) Etsy "Thank You, France" (Agency: Orchard)
 - 15) Kia "Perfect 10" (Agency: David&Goliath)
 - 16) Popeyes "The Wait Is Over" (Agency: McKinney)
 - 17) Booking.com "Tina Fey Books Whoever She Wants to Be" (Agency: Zulu Alpha Kilo)
 - 18) Bud Light "Easy Night Out" (Agency: Anomaly)
 - 19) Disney+ "Well Said" (Agency: Ultrabland)
 - 20) Foundation to Combat Antisemitism "Silence" (Agency: Quantasy)
 - 21) 2Homes.com "Launch" | "Salon" | "Mascot" (Agency: RPA)
 - 22) Kawasaki Ridge "Mullets" (Agency: Goodby Silverstein & Partners)
 - 23) Michelob Ultra "Superior Beach" (Agency: Wieden+Kennedy)
 - 24) NFL "Mental Game" | "Tackle Bullying" (Agency: 72andSunny)
 - 25) Pfizer "Here's to Science" (Agency: Publicis Conseil, Le Truc, Publicis New York)

- 26) Come Near “Feet Washing” | “Who Is My Neighbor?” (Agency: Lerma/)
 - 27) E-Trade “Picklebabies” (Agency: 72andSunny)
 - 28) e.l.f. “Judge Beauty” (Agency: Shadow)
 - 29) Mtn Dew “Having a Blast” (Agency: Goodby Silverstein & Partners)
 - 30) Oreo “Twist on It” (Agency: The Martin Agency)
 - 31) Snap “Less Social Media. More Snapchat” (Agency: In-house)
 - 32) Starry “It’s Time to See Other Sodas” (Agency: VaynerMedia)
 - 33) T-Mobile “That T-Mobile Home Internet Feeling” (Agency: Panay Films)
 - 34) T-Mobile “T-Mobile Auditions” (Agency: Panay Films)
 - 35) Uber Eats “Worth Remembering” (Agency: Special Group U.S.)
 - 36) Apartments.com “Extraterrestrials” (Agency: RPA)
 - 37) Budweiser “Old School Delivery” (Agency: FCB New York)
 - 38) Hellmann’s “Mayo Cat” (Agency: VML)
 - 39) Pringles “Mr. P” (Agency: Grey)
 - 40) Toyota “Dareful Handle” (Agency: Saatchi & Saatchi and Le Truc)
 - 41) BetMGM “Tom Has Won Enough” (Agency: Highdive)
 - 42) Coors Light “Return of the Chill Train” (Agency: Droga5)
 - 43) CrowdStrike “The Future” (Agency: In-house)
 - 44) Drumstick “Doctor on the Plane” (Agency: Opinionated)
 - 45) M&M’s “Almost Champions” (Agency: BBDO New York)
 - 46) Microsoft “Watch Me” (Agency: Panay Films)
 - 47) Nerds “Big Game Commercial ft. Addison Rae” (Agency: Digitas Chicago)
 - 48) TurboTax “TurboTax Super Bowl File” (Agency: R/GA)
 - 49) Lindt “Life Is a Ball” (Agency: Grey Toronto)
 - 50) Skechers “Mr. T in Skechers” (Agency: SKX Studios [in-house])
 - 51) American Values 2024 “Kennedy” (Agency: N/A)
 - 52) Astellas “Not Flashes” (Agency: Saatchi & Saatchi Wellness)
 - 53) Bass Pro Shops “Making Memories on the Water” (Agency: In-house)
 - 54) FanDuel “Kick of Destiny 2” (Agency: Wieden+Kennedy)
 - 55) Squarespace “Hello Down There” (Agency: In-house)
 - 56) Temu “Shop Like a Billionaire” (Agency: In-house)
- **Clio Awards** selected L’Oréal-owned skincare brand CeraVe’s comical 30-second Super Bowl spot starring Michael Cera (and developed by agency Ogilvy PR North America) as Best Super Bowl Ad. The spot was also one of six recognized by Ad Age with five stars as the best ads of the game. Last year’s winner was Tubi, “Rabbit Holes.”
 - **MediaPost’s 2023 Media Agency of the Year** was Kinesso. Its parent organization, IPG Mediabrands, consolidated much of its data and technology assets under NY-based Kinesso to create a tech-driven performance agency, unifying the complex nature of a brand’s media, data, audience, analytics, and creative architecture.
 - **MediaPost’s 2023 Holding Company of the Year** was Omnicom, for its unique proprietary data informing Omni and the group’s AI-powered technology developed by one of Omnicom’s operating units (culture consultancy Sparks & Honey’s Q) and how Omnicom integrated Q into Omni.
- Noteworthy quotes:**
- » “Creative organizations can benefit from—and need to foster—an environment of proactive disagreement so they may harness its benefits.” —Jamie King, Partner, **Camp + King**
 - » “Today’s SOWs are designed to cover in all media possibilities rather than solve brand problems and drive growth. Media and creative SOWs are developed unilaterally by advertisers and given to their agencies for execution.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
 - » “As AI-fueled content and experiences become more commonplace, the most effective customer-facing AI strategy may be an ‘AI-free’ strategy.” —Emily Weiss, Principal Researcher, **Gartner**
 - » “Clients don’t need service. (They will tell you they get great service.) What they need is LEADERSHIP.” —Lori Bartle, Founder, **Cultivagency**
 - » “The key to creativity is two things: embracing diverse perspectives and channeling an innovative spirit.” —Andrea Zaretsky, CMO, **Morgan Stanley Wealth Management**
 - » “Scope of work focus is now needed to simplify decision-making and improve the quality of marketing decisions.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
 - » “If we want to get the most out of our agencies, we need to figure out how to arouse their emotion —arouse their emotions to the point of behavior.” —Michael Fanuele, Founder and Director, **Lab of Creative Commerce**
 - » “A dynamic at the core of partnerships is proactive disagreement, the practice of constructively pitting differing points of view against each other to inspire enhanced creativity.” —Jamie King, Partner, **Camp + King**
 - » “Even if you’re not feeling completely prepared, aim for the stars, and if you happen to fall a bit short, hey, you’ll still land on the moon.” —Jose Gonzalo Bisquerra Mora, VP of Procurement for the Americas, **Haleon**
 - » “No matter how technically proficient AI gets, people can always tell when something is lacking that spark.” —Rhea Scott, Founder and President, **Little Minx**

FINANCIALS: Driving efficient use of resources



The global geopolitical situation, with conflicts in Europe and the Middle East, is creating expected tension in the business and financial worlds, even as uncertainty is met with defiance, resilience, and optimism. Perhaps the US election combined with the Olympic Games and other sports events, like the UEFA Euro soccer championship, gives the world of advertising reasons to stay. ECI Media Management provides a solid global economic outlook and views about the impact of CPI and GDP indicators on media, tech, and the overall advertising sector. Most analysts anticipate a challenging year for TV due to the significant progress made in streaming services. Retail media and social commerce continue to show tremendous progress, and AI remains the buzzword that is now applied to everything in advertising, not unlike how “organic” became the word of choice for most products on the shelves of grocery stores in Western cultures. In the meantime, Brian Wieser of Madison and Wall noted that Google, Meta, Amazon, Microsoft, and Apple—five of the world’s top 20 sellers of advertising representing more than \$400 billion in annual ad revenue, or 55% of the world’s advertising outside of China—reported strong results. So many reasons to be optimistic.

- Per Madison and Wall’s Brian Wieser, **ad revenue in the US** will rise 8% in the first quarter (excluding political ads) and 5.6% for the full year, up from a prior 5.2% annual growth forecast, or \$15.5 billion across all media in 2024, mostly fueled by commerce media and social media. Social media will account for 11.7% of all spending. Digital advertising is projected to account for 76% of all advertising spending in 2028.
- **Publicis Groupe** committed to pay a record €540 million in annual bonuses to employees, while “strongly reducing” spend on freelancers by 27%. The holding company claims that it maintained its high profit margin (18%) thanks in part to its strategic decision to slash the use of freelancers.
- Per R3, **Publicis Groupe** ranked #1 in global new business gains for full-year 2023, with net new business revenue of \$700 million (\$315 million from media pitches and \$385 million from creative pitches), up nearly 7% from 2022. Next were WPP, which reported net new business revenue of \$526 million, up nearly 5%, and Interpublic Group, with \$397 million in total net new business, up almost 5%. The number of total accounts awarded went down 3%, although the overall value increased 5%.
- **WPP CEO Mark Read** took a 33% pay cut in 2023, or 4,498,000 GBP, down from 6,682,000 GBP in 2022, reflecting the company’s difficult financial year, when WPP’s reported and organic revenue growth were less than 1%.
- **ECI Media Management** released its media inflation report for Q1 2024. The firm forecast that overall global media inflation will reach 3.1% in 2024, lower than 2023: “All media types are forecast to see some level of inflation at a global level, although there are variations at a regional and market level. OOH and Online Video are forecast to have the highest inflation at a global level, overtaking TV.”
- Per Ad Age, **Publicis Groupe’s Publicis Health** reached a \$350 million settlement with all 50 U.S. states to resolve probes into its conduct of helping Purdue Pharma recklessly increase sales of OxyContin and other highly addictive painkillers for nearly a decade. Publicis is prohibited from accepting any future contracts or engagements related to the marketing or sale of opioids.
- A recent **WFA survey** about “Setting and delivering targets in marketing procurement” concluded that 11% of global advertisers see production as the driver of savings efforts in 2024 and 20% see creative savings as their main focus. However, 53% expect to see media to continue as the main driver of procurement savings in 2024.
- **Procter & Gamble Co.** reported saving at least 10% in media costs thanks to its in-house buying. Per Ad Age, P&G is now doing nearly 100% of media buying in-house in the US and China and expanding the practice across Europe, beyond its original five countries. External media agencies are still working with the brand and handle key functions such as automation, measurement, and media supply chain streamlining.
- Per Insider Intelligence/eMarketer, **programmatic ad spending** will reach \$157.35 billion in H1 2024, a 15.9% growth rate. It represents 91.3% of all ad spending. Comparatively, nonprogrammatic ad spend is forecast to grow by 5.3% in 2024.
- **Ciesco Market Intelligence** accounted for 2,068 transactions in 2023, a 1% decline YOY. Total disclosed deal value stood at \$43.5 billion, excluding three megadeals (above \$10 billion). The US and UK were the most active markets in 2023, together accounting for 48% of deals. Companies equipped with technological capabilities and assets with the digital services subsectors were most favored. Per Ciesco, the six largest advertising holding networks completed 37 acquisitions, a 23% increase from 2022. Havas led with 10 acquisitions, followed by Omnicom with nine. Accenture dominated the consultancy category with seven acquisitions. Stagwell slowed its acquisitions rate by 50%, making five buys.
- Per Ciesco, **Havas** emerged as the most acquisitive strategic and holding group of 2023, making 10 acquisitions: “Renowned for its innovative blend of data-driven insights and creative expertise, Havas stands at the forefront of the evolving advertising, media, and digital landscape and has been a consistently acquisitive network, having made 8 acquisitions throughout 2022.” Recent acquisitions included HRZN, Eprofessional, and Uncommon Creative Studio. **Omnicom** is the world’s second-largest ad holding company, with nine acquisitions, such as Grabarz & Partner and Flywheel Digital. **Accenture Song**, which recorded \$18 billion in revenue in 2023, has been a key player in the media and marketing landscape in recent years with acquisitions like Bourne Digital, Signal, and Jixie.
- Paris-based media agency research firm **RECMA** released its “New Biz Balance” report for 2023, which ranks Mediabrands’ agency UM number one in net new business (scoring \$1.139 billion), followed by Omnicom Group’s Hearts & Science (\$1.137 billion) and sibling agency OMD (\$885 million).

Holding company financial performance:

- **WPP** reported declining Q4 revenue with organic growth of -2.8% (and -4.1% in the US). Revenue declined by 4.5% in the US in the fourth quarter, especially at agencies like VML and AKQA, primarily due to lower spending by technology, healthcare, and retail clients. The holding company reported \$18.7 billion in FY23 revenue, a 2.9% increase YOY and 15% operating income margin. Solid new business performance: \$4.5 billion net new billings (2022: \$5.9 billion) and major new assignments with clients such as Allianz, Krispy Kreme, Mondelez, Nestlé, PayPal, and Verizon. Global Integrated Agencies FY LFL revenue less pass-through costs grew 1.3% (Q4: +0.7%): within which GroupM, their media planning and buying business, grew 4.9% (Q4: +5.7%), partially offset by a 1.6% decline in other Global Integrated Agencies (Q4: -3.4%). The group’s six agency networks—VML, Ogilvy, AKQA, Hogarth, GroupM, and Burson—now represent close to 90% of WPP’s revenue less pass-through costs. WPP is investing in its AI-driven platform, WPP Open, while building deep partnerships with strategic technology partners such as Adobe, Google, IBM, Microsoft, Nvidia, and OpenAI. WPP creative agencies produced 12 Super Bowl spots and its media agencies worked on 19 spots. The London-based group projected flat to 1% revenue growth YOY in 2024 and margins of 15% to 15.2%.
- **Omnicom** reported Q4 revenue of \$4 billion with organic growth of 4.4% and an operating income margin of 15.9%. The holding company reported full-year 2023 revenue of \$14.6 billion, an increase of \$403.1 million, and organic growth of 4.1%, operating income of \$2,104.7 million, and an operating income margin of 14.3% (vs 14.6%). Organic growth by discipline: 6.5% for advertising & media, 3.8% for healthcare, 3.1% for precision marketing, 3% for experiential, and 1.2% for commerce & branding, partially offset by declines of 1% for execution & support and 0.8% for public relations. Organic growth by region: 2.6% for the United States, 7.2% for Euro Markets & Other Europe, 6% for Asia Pacific, 4.7% for the United Kingdom, 13% for Latin America, and 3% for Other North America, partially offset by a decline of 5.8% for Middle East & Africa. Salary and service costs increased \$375.3 million, or 3.6%. Initial growth guidance for full-year 2024 is 3.5% to 5% with a focus in digital commerce and retail media from the Flywheel acquisition, transforming the ad-marketing company into a “marketing and sales” firm given the huge amounts of marketplace sales data combined with the spending data within the group’s Omni operating system.
- **Interpublic Group** reported Q4 revenue of \$3 billion with organic revenue growth of 1.7%. (US organic growth was 0.1%; international organic growth was 4.3%). The holding company reported full-year 2023 revenue of \$10.9 billion with organic revenue of -0.1% (US organic change was -1.1%; international organic growth was +1.8%). FY23 net income was \$1,098.4 million, with a 16.7% operating income margin. Effective and proven expense management remains an ongoing priority, as does continued streamlining of operations and processes.

Furthering investment in emerging opportunities: high-growth media channels and digital commerce, development of new media buying models, personalized, data-infused creativity, and increasingly incorporating generative AI across the enterprise. Guidance is organic net revenue growth for 2024 in a range of 1% to 2%, and a full-year adjusted EBITA margin of 16.6%. Staff cost ratio, which is total salaries and related expenses as a percentage of revenue before billable expenses, was 59.4% in the fourth quarter of 2023, compared to 61% in the same period in 2022.

- **Publicis Groupe** reported €13.1 billion (\$14.14 billion) in revenue for FY2023, up 35% from 2019, with 6.3% organic growth and a stronger than expected Q4 at +5.7%, substantially outperforming holding company peers. The group, with 3,641 main clients, grew by 5% in the US, 10.3% in Europe, and 2.9% in Asia-Pacific. Its operating margin was flat at 18% as the firm incurred some other expenses, including restructuring costs and an investment in artificial intelligence. It ranks #1 in new business over the last five years. The group projects organic growth of 4% to 5%, an operating margin of 18%, and free cash flow between €1.8 billion and €1.9 billion.
- **Dentsu** reported an increase of 0.7% in net revenues YOY for Q4 FY2023, with an overall net revenue growth of 1.6% for FY2023, or 1,129 billion yen (\$7.46 billion). Organic revenue fell by 6.6% in Q4 and by 4.9% for the entire year, as Dentsu cited delays of large transformational projects within Customer Transformation & Technology (CT&T), mainly due to the increased cost of capital globally. CT&T revenues reached 32% of group revenues. The operating margin for FY2023 was reported at 14.5%. Dentsu is projecting 1% organic growth and an operating margin around 15% in 2024.
- Vivendi subsidiary **Havas Group** reported full-year 2023 net revenue of 2.7 billion euros, up 4.1% YOY, and full-year 2023 organic growth of 4.4%. Europe and North America (84% of its business) were Havas’ largest contributors to growth with 1.7% and 1.9% organic growth, respectively. The holding company is exploring the possibility of separating the firm into four companies to unlock greater value. The group completed nine acquisitions (HRZN, Noise, Uncommon Creative Studio, CV&A Consultores, PR Pundit, Trinity, Eprofessional, PivotRoots, Austrian Public Affairs, and Klareco Communications), reinforcing its footprint in UK, Germany, India, and North America, and strengthening expertise in creativity, performance marketing, and strategic communication.
- **Other groups:** The Martin Sorrell-led company S4 Capital reported that full-year 2023 net revenue was down 2.1%, to 873.2 million GBP, with an organic net revenue decline of 4.5%. The firm cited macroeconomic issues, technology sector weakness, and budget declines among smaller clients.

To recap full-year 2023 results of the top holding companies (excluding Accenture Song, Havas Group, Stagwell, S4 Capital, etc.):

Holding Company	FY23 Revenue	FY23 Organic Growth	FY23 Income Margin
WPP	\$18.7 billion	0.5%	14.8%
Omnicom	\$14.6 billion	4.1%	14.3%
Publicis Groupe	\$14.1 billion	6.3%	18.0%
IPG	\$10.9 billion	-0.1%	16.7%
Dentsu	\$7.46 billion	-4.9%	14.5%

Mergers and acquisitions (M&A) activity:

- Digital creative agency **Accenture Song** acquired Germany's Mindcurv (a cloud-based digital experience and data analytics company), Singapore-based Jixie (a monetization and marketing growth tool platform), and Melbourne-based The Lumery (a martech consultancy focused on marketing transformation efforts) in a move to boost its personalization, CRM, and loyalty, testing, and experimentation and automation capabilities.
- **UTA** acquired JUV Consulting, a marketing, creative services, and research agency that helps clients target Gen Z consumers. The firm will be rebranded as Next Gen as a new practice within UTA's entertainment marketing division.
- **WPP** took a minority stake in a recently launched digital agency called OH-SO Digital, with offices in Hamburg and Prague, that combines marketing, commerce, and technology to co-create digital products, platforms, and software.
- Full-service Miami-based digital marketing agency **Mod Op** acquired Philadelphia-based creative firm Red Tettemer O'Connell + Partners in a move to deepen Mod Op's creative services while expanding its capabilities in social media, experiential marketing, and content production. The combined entity has offices in New York, LA, Dallas, Kansas City, Missouri, Portland, Minneapolis, Philadelphia, Cleveland, Toronto, and Panama City, Panama.
- **Stagwell** acquired French digital brand and marketing consultancy What's Next Partners (WNP) to strengthen the group's capabilities in data-driven strategies, integrated communication, and creative content. WNP will become the first co-branded member of the Anomaly Alliance, expanding Anomaly's global footprint to France. The firm has offices in New York, Los Angeles, Toronto, London, Berlin, and Shanghai.
- **Stagwell** acquired London-based agency group Sidekick, a collective of specialist agencies focused on experiential, digital storytelling, and branded content in a move to strengthen the group's content innovation capabilities. Sidekick is now aligned with Stagwell's global marketing and communication consultancy Allison.
- **Accenture's Accenture Song** acquired Sofia, Bulgaria-based GemSeek to reinforce the digital firm's capability in global customer experience analytics. Other recent acquisitions included Work & Co, ConcentricLife, Fiftyfive5, Rabbit's Tale, and The Stable.
- **Accenture** acquired Insight Sourcing, a provider of strategic sourcing and procurement services, in a move to broaden Accenture's sourcing and procurement services for private equity companies and the consumer goods, retail, technology, and industrial industries.
- **Havas** acquired branded content specialist Wilderness in a move to enhance its social marketing capabilities. Wilderness will be based at Havas Village in London. The agency is known for serving as an in-house partner to major entertainment brands (Sony Pictures, 20th Century, Universal Pictures) on projects such as branded content, shoppable experiences, and "always-on" production.

- **Havas** acquired UK-based B2B marketing agency Ledger Bennett. Havas Business will merge under Ledger Bennett, forming a 100+-person B2B specialist group within Havas Media Network, called "Ledger Bennett, a Havas Company." Havas has other UK-based B2B specialists, including H/Advisors Maitland and Gate One.
- Performance marketing agency **NP Digital** acquired Montreal-based Rebl House to expand the company's offerings into creative and branding, including a production house. Rebl House offers several services, including brand development, influencer marketing, creative strategy and video, photo, audio, and graphic and motion production.

Noteworthy quotes:

- » "In the US and Europe, there's growing interest in the impact of creative effectiveness on overall business growth and cultural relevance, placing a premium on impactful and innovative creative work." —Greg Paull, Principal and Co-founder, **R3**
- » "We need more alignment at an enterprise level, beyond individual scopes, between CFO, CPO and CMO so procurement can work towards optimizing company investments, not just marketing budgets." —Laura Forcetti, Director of Global Sourcing, **WFA**
- » "Making the numbers" has become the dominant third pillar of Madison Avenue's culture. Downsizing is routinely used to boost profit margins, adding employment uncertainty as a routine feature of agency life." —Michael Farmer, Chairman & CEO, **Farmer & Company LLC**
- » "We do not sell time; we sell results." —Darryl Sparey, Managing Director, Co-Founder, **Hard Numbers**
- » "We do have a mechanism in place to offer clients access to below-marked [priced] inventory in a fully disclosed, triple opt-in, triple bid process." —Kamran Asghar, CEO, **Crossmedia**
- » "Once you give a procurement person a unit rate or hourly costs to procure your service, you are handing them a stick to beat you with; you're allowing them to find the lowest common denominator to pressure you into similar pricing." —Darryl Sparey, Managing Director, Co-Founder, **Hard Numbers**
- » "The currency that matters is sales dollars. It's time to innovate on measurement that proves sales effectiveness in an easier, faster, more reliable way." —Marc Pritchard, Chief Brand Officer, **P&G**
- » "Agency fees have lagged the growth of their SOWs. The price of agency services has declined dramatically, forcing agencies to downsize. Senior headcounts have been reduced; agencies have become more junior to execute the massive volume of digital and social outputs." —Michael Farmer, Chairman & CEO, **Farmer & Company LLC**

Getting Stuff Done— Better, Faster, Smarter



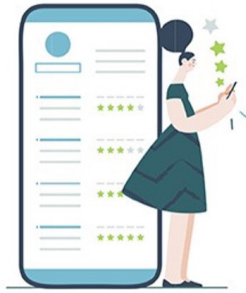
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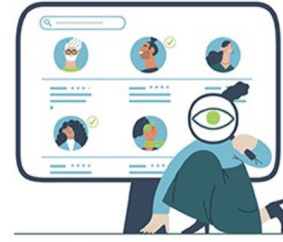
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Thorough Performance
Assessments



U

Unbiased KPIs



FF

Full-length, Fundamental
Agency Roster

Check out our article, **“Getting Stuff Done—Better, Faster, Smarter”**: Explore how you can improve the output of client–agency collaboration to drive cost efficiencies and bulletproof your business in turbulent times.

Rank	Rank Last Quarter	Holding Group	Estimated Creative YTD Revenue (USD \$M)	Estimated Media YTD Revenue (USD \$M)	Estimated Overall YTD Revenue (USD \$M)
1	1	Publicis Groupe	385.1	314.9	700.0
2	2	WPP	390.4	135.1	525.5
3	3	Interpublic	323.2	73.7	396.9
4	4	Omnicom	168.2	208.0	376.2
5	5	Dentsu	105.7	56.7	162.3
6	6	Havas	68.1	65.7	133.8
7	8	Accenture	15.5	0.0	15.5
8	7	Stagwell Group	6.7	-2.1	4.6

Per R3, Publicis Groupe ranked #1 in global new business gains for full-year 2023 with net new business revenue of \$700 million (+7% YOY), including \$315 million from media pitches and \$385 million from creative pitches.

WPP was next, with net new business revenue of \$526 million (+5% YOY), including \$135 million from media pitches and \$390 million from creative pitches.

The number of total accounts awarded was down about 3%, although the overall value increased 5% (8% increase in value and 14% decrease in volume for creative, and 1% increase in value and 17% increase in volume for media).



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In 2023, COMvergence assessed 4,380 media account moves and retentions (≈ 2,790 advertisers total) in 48 countries, totaling \$35 billion (+9% vs. 2022). Local pitches represented 55% of the total reviewed spend amounting to \$19 billion.

Global and multi-country reviews concluded in 2023 resulted in a total of \$16 billion. These include accounts such as Pfizer (\$1.35 billion), Ferrero (\$970 million), Nestlé EU (\$700 million), General Mills (\$690 million), Beiersdorf (\$675 million), and Nestlé (\$565 million), among 85 other international pitches. The average retention rate was only 25% (vs. 34% in 2022); it is the lowest rate since 2016. Wavemaker, Mediaplus, Zenith, and OMD have been the most successful agency networks to retain their client relationships put in play.

Publicis Media scored the best retention rate (61%) among the “Big 6” groups. About \$4.2 billion (10%) of the total reviewed spend was won by alternative solutions/stand-alone units from the media agency networks owned by the Big 6. Most of them were US top advertisers (BMS, BMW, Geico, LVMH, Pfizer, Signet Jewelers, Walgreens).

Of the total media spend reviewed in 2023, \$5.2 billion (or 15%) went to independent agencies or in-house. Horizon Media, the largest independent agency worldwide, contributed 30% of the total figure. Wavemaker came out as the #1 global media agency network with a total new business value of +\$2.4 billion, including retentions (\$1.7 billion, including Huawei and Xiaomi in China, and Adobe in the US). OMD ranks #2 after scoring the largest number of new client wins (+\$1.7 billion), thanks notably to several global additions, including Beiersdorf, Tchibo, Under Armour, Vans, and Versuni.

The largest global and multi-country reviews resulted in **\$16 billion**. The 20 largest reviews include:



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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 do not receive media attention and therefore are not included here.

- Apparel retailer **Abercrombie & Fitch** selected global creative agency Amplify as its events partner. The agency will handle all immersive events for the brand.
- America's first franchised QSR chain, **A&W Restaurants**, retained woman-owned agency Cornett as its advertising AOR for over a decade, following a review. A full-service advertising agency, Cornett was named a Small Agency of Year by Ad Age and twice ranked as a Best Place to Work in Kentucky.
- **Bridges Consumer Healthcare** selected Cincinnati full-service agency Curiosity as its AOR following a review. The agency will handle creative, media planning and buying, and influencer and social-marketing efforts across the entire brand portfolio.
- Mexican food company **Cacique Foods** selected Minneapolis-based Periscope, a Quad company, as its creative AOR. The agency will partner with the brand's media, shopper marketing, public relations, and social media agencies.
- Olive-oil brand **California Olive Ranch** selected ad agency Argonaut as its creative AOR. The agency will handle strategic and creative work from its San Francisco and New York offices.
- Children's apparel brand **Carter's** selected Mischief @ No Fixed Address as its new creative AOR without a review. The agency will handle all creative and digital duties for the company's brand portfolio (OshKosh B'gosh, Little Planet, and SkipHop).
- **Credit One Bank** selected Deutsch LA as its creative, branding, and media AOR following a review, replacing five-year incumbent Dallas-based The TRG Agency. Deutsch LA will handle media and analytics as part of the win, integrating the discipline with the agency's core creative offering.
- Cruelty-free beauty brand **e.l.f. Beauty** selected Oberland as its purpose AOR. The multidisciplinary, full-service disruptive agency was previously doing project work for the brand.
- **European Wax Center** selected Acadia as its media AOR in a move that consolidates national search, Amazon commerce, and paid media, replacing four-year incumbent Crossmedia. Acadia was MediaPost's 2023 Independent Agency of the Year.
- Construction products and services provider **Ferguson Enterprises** selected Omnicom Media Group performance marketing agency TCA as its media AOR in North America following a review. TCA designed a bespoke marketing and media solution for the brand.
- **Ferrero Group** selected iProspect as its US media AOR following a review, replacing incumbent GroupM agency Mindshare. The agency was already handling the international Ferrero account (UK, France, Germany, New Zealand, and Thailand) after winning it approximately a year ago, so the move consolidates media duties for the brand.
- Restaurant chain **Firehouse Subs** kicked off a review of its creative account. Dallas-based incumbent agency The Richards Group has been working with the brand since 2016 but will not defend.
- Brazilian restaurant brand **Fogo de Chão** selected Stagwell's Gale unit as its media and creative AOR. The agency will handle creative, social, influencer and media strategy, media planning and buying, data analytics and reporting, and brand strategy and stewardship.
- **General Mills** kicked off a review of its global creative business (AORs and project-based agency roster) across its portfolio including iconic brands like Cheerios and Fiber One. The creative AOR will work with Interpublic Group of Cos.' UM, the newly appointed media AOR. The brand currently works with creative shops Erich & Kallman, Ingredient, Pereira O'Dell, Anomaly, etc.
- Independent Toyota distributorship **Gulf States Toyota** selected Erich & Kallman as its creative AOR following a review, as part of a consolidation process for the second-largest distributor of Toyota vehicles. The agency will handle regional work in Arkansas, Louisiana, Mississippi, Oklahoma, and Texas. Note: Publicis Groupe's Saatchi & Saatchi handles Toyota's national creative.
- General Mills' **Häagen-Dazs** ice cream brand selected former Publicis-owned agency BBH as its global AOR, replacing incumbent Swedish agency Forsman & Bodenfors. BBH, which originally worked with Häagen-Dazs in the 1990s, will work globally, including in Asia (Hong Kong, China, Korea, and Taiwan).
- Health giant **Haleon** selected Brandtech Group's Collectively as its influencer marketing AOR in the US following a review. The agency will handle the brands' over-the-counter drug and wellness brands (Sensodyne, Centrum, Theraflu, Flonase, Voltaren, and Advil) and partner with other agencies to support more integrated planning to include earned media as well.
- TJX retail-owned home furnishing stores brand **Homesense** selected independent New York agency Fig following a review. The agency will handle all brand and creative work for the brand.
- **HP Inc.** retained PHD as its global media AOR, its incumbent agency since 2009. PHD was awarded the traditional media buying account in 2010 and won the entire media business in 2017. The agency will leverage its connected intelligence of the global PHD network, supported by the scale and infrastructure of Omnicom Media Group, to augment HP's in-house team.
- Grocery chain retailer **Hy-Vee** selected WPP Ogilvy Health as its strategic and creative AOR across all of its healthcare brands (RedBox Rx, Vivid Clear Rx, Amber Specialty Pharmacy, Hy-Vee Health Infusion Care). The agency will handle all strategy and creative work for the company's 275 locations.

- **J.Crew Group** selected independent agency PMG as its media AOR following a review. PMG will handle media planning and buying across all brands and digital channels, including J.Crew, Madewell, and J.Crew Factory, leveraging data-driven insights and intelligence from its proprietary Allii marketing technology platform. The agency previously did work for the Madewell brand.
- Nashville-based footwear, apparel, and accessories brand **Johnston & Murphy** selected Stagwell's Wolfgang as its new creative AOR following a review.
- The Dallas-based air carrier and semiprivate jet service **JSX** selected PMG its media and creative AOR following a review, replacing media incumbent San Francisco-based Ben-Her Marketing and creative incumbent San Francisco-based Eleven, in a move to combine media and creative under one shop.
- Ecotone-owned British organic and natural food brand **Kallø** selected creative agency Isobel as its brand AOR. The agency has previously produced campaigns for some of the company's brands, namely Whole Earth and Clipper Tea.
- Retailer giant **Lowe's** selected Dentsu Creative as its lead creative AOR for the US following a review. The brand has previously worked with several agencies, including Deutsch LA, assigned to different brands or regional markets.
- **McDonald's** selected independent Wieden+Kennedy NY as its creative AOR for the Happy Meal marketing business in the US, replacing incumbent Omnicom's DDB and its dedicated Chicago-based We Are Unlimited unit. Wieden+Kennedy has been working with the brand on other assignments for the past five years, now expanding its scope with the company.
- Premium whisky brand **Monkey Shoulder** (owned by William Grant & Sons) selected independent Special London its new global creative AOR following a review. The agency will handle global strategy and creative development for the brand.
- Tropicana Brands Group-owned **Naked Juice** selected independent New York agency Fig as its creative AOR following a review. The agency will handle online video, social, digital, OOH, and activations.
- Food company **NatureSweet** selected Austin, Texas-based agency Bakery as its AOR. The agency will handle all brand and creative work.
- **Newell Brands** selected independent Crossmedia as its global media AOR following a review, consolidating assignments previously assigned to several agencies led by independent and now incumbent Cincinnati-based Empower. The agency will partner with the brand's in-house agency and external agencies.
- Broadband communication and video services provider **Optimum**, a brand of Altice USA, selected New York-based O1, a Publicis Power of One solution, as its creative, media, PR, and production AOR following a review. O1 was created as a dedicated team for the brand, powered by a collective of Publicis Groupe agencies: Saatchi & Saatchi will lead brand strategy and creative development; Connect at Publicis Media will support national, regional, and local media planning and buying; MSL will guide external media relations and brand reputation building; and PXP will lead performance-driven production.
- Pharmaceutical giant **Pfizer** selected Publicis Group as its new creative AOR, following a review and replacing incumbent IPG one year after selecting IPG (IPG Health and FCB) as its creative partner and "integrated global engine." IPG Health is retaining some medical-focused work, and IPG-owned Weber Shandwick is retaining PR.
- **PIM Brands** (owner of Welch's Fruit Snacks, Fruit 'n Yogurt Snacks, Fruit Rolls, Juicefuls, etc.) selected independent Gut Miami as its new creative AOR. The agency will handle campaigns and identity assets for the brand's portfolio in the US and lead all aspects of the creative development process, including production oversight and the management of platform ideas, messaging, and visualization.
- Accounting and professional services giant **PwC** selected Interpublic Group of Cos.' McCann as its global creative AOR, replacing several project-based agencies. McCann will leverage other teams within its network, including McCann Enterprise and MRM teams in New York and London. A creative platform will be built in partnership with FutureBrand.
- Mexican fast-casual brand **Qdoba** selected Chicago-based ad agency Leo Burnett as its creative and production AOR. The agency knows the category well, working for brands like McDonald's and Dunkin' in the past.
- Fire pits brand **Solo Stove** selected independent PMG as its media AOR. The agency will partner with several creative agencies, including The Martin Agency.
- Music streaming giant Spotify selected Publicis Media as its global media AOR following a review and formed a bespoke OneVibe unit to manage the account, replacing incumbent Interpublic media agencies. The agency will handle all media duties globally and regionally, including performance marketing. Social performance will remain with the brand's in-house team.
- Skincare and beauty brand **Supergoop!** selected Digitas (and its New York office) as its media AOR following a review. The agency will handle all media work, including paid search, paid social, display, video, retail strategy, influencers, and data and analysis for the portfolio of brands (Glowscreen SPF 40, Unseen Sunscreen SPF 40, Triple Prep Weightless Multitasking Moisturizer SPF 4, and Glow Stick).
- **Suzuki** selected UK-based TMW Unlimited as its integrated creative, content, and CRM AOR following a review. The agency will handle integrated creative campaigns and content across all major channels as well as above-the-line advertising for Suzuki's auto division, content creation, and responsibilities for data and CRM for cars, motorcycles, all-terrain vehicles, and marine engines.
- **Telefónica** selected and retained 15-year incumbent WPP following a review, expanding the agency's remit across Latin America. Before the review, VMLY&R led the account, working with other WPP shops, including Design Bridge, Ogilvy, and Kantar. The holding company created a bespoke entity called Blue Spark Partnership, led by VML to service the expanded account that will focus on strategy and creative work for the brand across the region. The four "centers of excellence" are strategy, social media, owned media, and trade media.

- Ahold Delhaize-owned omnichannel grocery retailer **The Giant Company** selected Allen & Gerritsen as its creative AOR following a review. The agency will handle brand strategy, messaging strategy, campaign and activation development, measurement/data strategy, TV and digital video, print, radio, OOH, social, digital and mobile experience, and in-store.
- Telecom giant **T-Mobile US** selected Dentsu Creative as its lead creative AOR following a review. The creative agency will partner with the brand's media AOR, IPG's Initiative.
- Sports apparel brand **Under Armour** selected Shadow as its AOR for celebrity, influencer, and consumer media relations. Agency clients include Google, e.l.f. Cosmetics, and Aerie.
- Consumer goods giant **Unilever** kicked off a review of its global media account, the first in six years. The brand is known to work with several shops, including WPP, Omnicom Media Group, Interpublic, and Havas Media.
- **Volkswagen Commercial Vehicles UK** selected Adam&eveDDB as its advertising AOR following a review and replacing incumbent agency BBH. The agency previously worked with the brand and has offices in London, Berlin, and New York.
- Restaurant chain **Zaxby's** kicked off a review of its creative business. The incumbent agency Tombras may defend the business. The selected agency will partner with the newly appointed media AOR.

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A word about the author: Bruno Galpois 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 him 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 Galpois, Co-Founder and Principal, Agency Mania Solutions

Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	A&W Restaurants	Cornett	Advertising AOR	US	Cornett	Y
Abercrombie & Fitch	Abercrombie & Fitch	Unknown	Events Partner	Unk	Amplify	Unk
	Bridges Consumer Healthcare	Unknown	AOR	Unk	Curiosity	Y
	Cacique Foods	Unknown	Creative AOR	US	Periscope	Unk
	California Olive Ranch	Unknown	Creative AOR	Unk	Argonaut	Unk
	Carter's	None	Creative AOR	Unk	Mischief @ No Fixed Address	N
	Credit One Bank	The TRG Agency	Creative, Branding & Media AOR	Unk	Deutsch LA	Y
	e.l.f. Beauty	Oberland <i>Expanding Work</i>	Purpose AOR	Unk	Oberland	N
	European Wax Center	Crossmedia	Media AOR	US	Acadia	Unk
	Ferguson Enterprises	Unknown	Media AOR	NAM	TCA	Y
	Ferrero Group	Mindshare	Media AOR	US	iProspect	Y
	Firehouse Subs	The Richards Group	Creative	Unk	IP	Y
FOGO DE CHÃO	Fogo de Chão	Unknown	Media & Creative AOR	Unk	Gale	Unk
	General Mills	<i>Various Agencies</i>	Creative AOR	Global	IP	Y
	Gulf States Toyota	Unknown <i>(consolidation)</i>	Creative AOR	US <i>(AR, TX, & Others)</i>	Erich & Kallman	Y
	Häagen-Dazs	Forsman & Bodenfors	AOR	Global	BBH	Unk
	Haleon	None	Influencer Marketing AOR	US	Collectively	Y
	Homesense	Unknown	Brand & Creative	Unk	Fig	Y
	HP Inc.	PHD	Media AOR	Global	PHD	Unk
	Hy-Vee	Unknown	Strategic & Creative AOR	US	Ogilvy Health	Unk
J.CREW	J.Crew Group	Unknown	Media AOR	Unk	PMG	Y
JOHNSTON & MURPHY	Johnston & Murphy	Unknown	Creative AOR	Unk	Wolfgang	Y
	JSX	Ben-Her Marketing & Eleven	Media & Creative AOR	NAM	PMG	Y
	Kallø	Unknown	Brand AOR	Unk	Isobel	Unk
	Lowe's	Deutsch LA & Others	Lead Creative AOR	US	Dentsu Creative	Y
	McDonald's	DDB	Creative AOR	US	Wieden+Kennedy NY	Unk

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IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Monkey Shoulder	Fallon	Creative AOR	Global	Special London	Y
	Naked Juice	Unknown	Creative AOR	Unk	Fig	Y
	NatureSweet	Unknown	AOR	Global	Bakery	Unk
	Newell Brands	Empower	Media AOR	Global	Crossmedia	Y
	Optimum	Unknown	Creative, Media, PR & Production AOR	US	Publicis O1	Y
	Pfizer	IPG <i>Maintains PR & Other</i>	Creative AOR	Global	Publicis Group	Y
	PIM Brands	Unknown	Creative AOR	US	Gut Miami	Unk
	PwC	<i>Various Project-Based Agencies</i>	Creative AOR	Global	McCann	Unk
	Qdoba	Unknown	Creative & Production AOR	Unk	Leo Burnett	Unk
	Solo Stove	Unknown	Media AOR	Unk	PMG	Unk
	Spotify	IPG Mediabrands	Media AOR	Global	Publicis Media	Y
	Supergoop!	Unknown	Media AOR	US	Digitas	Y
	Suzuki	Unknown	Integrated Creative, Content, & CRM AOR	Unk	TMW Unlimited	Y
	T-Mobile	Saatchi & Saatchi	Lead Creative AOR	US	Dentsu Creative	Y
	Telefónica	WPP <i>Expanding Work</i>	Creative & Strategy	LAM	WPP	Y
	The Giant Company	Unknown	Creative AOR	US	Allen & Gerritsen	Y
	Under Armour	Unknown	Celebrity, Influencer, & Consumer Media Relations AOR	Unk	Shadow	Unk
	Unilever	WPP, IPG & Others	Media	Global	IP	Y
	Volkswagen Commercial Vehicles UK	BBH	Advertising AOR	UK	Adam&eveDDB	Y
	Zaxby's	Tombras	Creative	US	IP	Y