

Industry Updates

Looking ahead to 2025:

How the trends and news of 2024
will impact us this year.

“This dynamic annual review offers an electrifying preview of the trends and transformations that will shape our industry. Dive in and discover the future unfolding before your eyes!”

—**Bruno Galpois**
Co-Founder & Principal, Agency Mania Solutions



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EXECUTIVE SUMMARY: Yearly recap



Bruno Gralpois
Co-Founder and Principal,
Agency Mania Solutions

The advertising industry is as intense as ever amid the dizzying pace of competition, technological innovation, and economic unknowns. For advertising professionals in the trenches, it's easy to fall behind in keeping up with what is happening in the sector on a daily basis when it comes to talent, tech, the actual (and very creative) work, mergers, roster changes, and financials. Fortunately, our recap of 2024 is here for you. Read on for insights into the year that was and the year ahead.

Observing trends from trailblazers and industry leaders, and absorbing insights from major company announcements, studies, research papers, and industry events, often provides answers about where things are heading. Consulting firms analyze historical data to predict the future.

This end-of-year summary of our bimonthly Industry Updates gives a comprehensive overview of the advertising industry's key events and trends.

Among them are technological innovations at major events like CES and sports events like the Super Bowl and the Olympics; key wins and recognitions such as the Cannes Lions International Festival of Creativity, International ANDY Awards, Clio Awards, and WARC Creative 100; talent consolidation within holding companies; and AI's growing influence.

Our yearly recap reports on a variety of topics:

- Financial performance of leading advertising firms
- Rapid changes in talent and production driven by AI
- In-house agencies
- Responsible advertising
- Major acquisitions and reorganizations
- New agency capabilities and roster changes, including who's winning and losing business among major advertising agencies and networks
- Our popular infographics on the top 15 agencies in the world
- Dozens of remarkable quotations from industry leaders that we carefully curated throughout the year

Use this annual summary as you will, perhaps to educate yourself, sharpen your skills, expand your knowledge, or identify and investigate a topic of interest. You can use it as a tool to inform your teams, discuss the implications of these trends with key business partners, challenge current efforts, or brainstorm new projects and future priorities.

Major themes



AI remains a major industry disruptor

How do we dissociate the buzz from substantive innovation in AI? How do we know which trends or company announcements truly indicate where the industry is heading? Let's face it. We are past the honeymoon phase of AI. The year prior, we referred to AI as "The beginning of a beautiful relationship between humans and machines." As evidenced at industry events like CES, AI is now an ingredient to every major innovation or product announcement not only in the advertising and tech sectors but also in healthcare, automotive, financial services, entertainment, and more.

The section of our Industry Updates dedicated to AI exploded this year with developments, making it challenging to keep up. Advertising has always been a wonderful playground for new technologies. Advertisers love to experiment and find new ways to engage audiences. AI, however, is more than a customer-facing experience. It has disrupted every aspect of how things get done in advertising, whether it's audience analysis; strategy and planning; copywriting; web design; media planning and buying; video production; email/social/search; or end-user productivity.

Will we tire of hearing about AI (as we did when "digital" became a buzzword in our then analog world) and simply expect AI to be embedded into tools and ways of working? Probably.



US elections, the Olympic Games and other key catalysts

Advertising spend often follows a four-year cycle due to several predictable large-scale political campaigns and global sporting events that occur on a quadrennial basis.

The ad industry reached new financial heights in 2024, bolstered by digital advertising, retail media, and CTV, but also by key events (UEFA Euro 2024, the Paris Olympics, and the US political election).

The US presidential election alone was forecast to account for about a third (\$11 billion) of US advertising spend. Political campaigns result in massive budgets allocated to television and digital ads. The successful and well-attended Paris Olympics contributed to a strong year in global advertising as well. To start the year, the 2024 Super Bowl sold out in terms of advertising placements at a cost of \$7 million for a 30-second unit.

These major events, and others, clearly benefited the ad industry in 2024.



The era of “platforms”: Agencies are transforming rapidly

The dynamic and diverse world of agencies has never been easy for advertisers to understand or navigate. In constant flux, agencies on a daily basis are rising, reorganizing, being acquired, merging, changing names, expanding, and adding capabilities.

Amid the tumult, a major trend has emerged among the big players. Major holding companies are transforming from being advertising centric, or platform based, to becoming “intelligent systems” that buy complementary agency offerings, heavily invest in R&D, AI, and other proprietary technological innovations, and form strategic partnerships with tech giants. All holding companies announced massive AI investments for training, recruitment, licenses, IT software, and cloud infrastructure. For example, Publicis Groupe announced it was investing 300 million euros to strengthen its AI capabilities and is leveraging past acquisitions like data giant Epsilon and digital transformation firm Sapient.

A blockbuster example of the new world order in advertising occurred in December, when Omnicom Group announced it was acquiring rival holding company Interpublic Group for an estimated \$13 billion to \$14 billion in an all-stock deal. The combined company would be the world’s largest advertising group (the transaction is expected to close in mid-2025), promising “the broadest and most innovative services and products, underpinned by the most advanced sales and marketing platform”—and resulting in \$750 million in annual cost savings, according to Omnicom.



A strong year for some but not for all

In a competitive environment, some agencies will do better than others. They make better decisions, hire better talent, invest in the right opportunities, pursue the right clients, and manage their business more effectively. Holding companies are publicly traded, giving us a unique vantage point into their overall performance, struggles, and successes. One agency did particularly well in 2024: Publicis Groupe. They had another strong year compared to their peers. WPP, still #1 in terms of global revenue, continues to struggle.

Clients are often putting their business up for review, especially in media, which represents the lion’s share of client advertising budgets. The average client retention rate was 25% among media agencies, the lowest since 2016. Among the top holding companies, as expected, Publicis scored the highest global retention rate, 61% compared with 45% for GroupM. We report quarterly on the financial performance of Publicis Groupe, WPP, IPG, Omnicom, and a few others, after they release earnings reports. An emerging group, Stagwell, deserves acknowledgment as they continue to grow through acquisitions and organically, proving that smaller networks or even smaller agencies are very compelling choices for advertisers looking beyond scale for creativity, innovation, and a more agile, flexible ecosystem of partners. I highly encourage you to follow what they do, what they say, and what they report back to financial markets, if you are to understand the dynamics of this industry.



In conclusion

There are many sources of data to look at, and we do. Various outlooks may even contradict each other, but if the sources seem reliable, we will post them and let you sort through the ones you feel are more accurate and insightful. One thing is certain, no matter what data point you look at: The entire global marketing industry is booming. Worldwide advertising grew by 5.9%.

For 2025, the current global forecast is +4.2%, reaching \$1.1 trillion revenue. The global digital economy is expected to grow at a 7% compound annual rate, to \$16.5 trillion in 2028. Digital pure-play advertising reached 70.6% of total ad revenue in 2024. Nine of the top 10 global media markets expect to see higher media prices in 2025 (+2.3%) compared with 2024 (+2.1%). Paid media is the largest share of budgets at 27.9% of total 2024 spend compared with agencies (21.6%), martech (23.8%), and labor (22.6%). Marketing budgets have dropped from an average of 9.1% of company revenue in 2023 to 7.9% in 2024, a fall of 15% year over year. There are encouraging signs that brand advertisers are looking to increase marketing expenditures in 2025 and beyond.

Remember, it’s not only about spending more. It’s about getting things done better, faster, smarter, and more collaboratively and efficiently. That is what we aspire to. It has been our mantra here at Agency Mania Solutions since our inception, so you are in good company. Enjoy a highly successful 2025, and keep reading and learning!



Agency

Roster changes
summary





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.

Apparel and luxury

- Apparel retailer **Abercrombie & Fitch** selected global creative agency Amplify as its events partner. The agency will handle all immersive events for the brand.
- 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).
- **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 Alli 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.
- 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.
- Caleres Inc.'s **Famous Footwear** brand selected Havas Media Network as its media AOR following a review and replacing Cincinnati-based incumbent Empower Media. The agency will handle all media planning and buying for the 860-store footwear retail chain.
- **Foot Locker** selected independent shop Within as its media AOR for North America following a review. The agency will handle digital media planning, buying, reporting, and optimization for Foot Locker, Champs Sports, and Kids Foot Locker.
- Fashion accessory marketer **Fossil Group** selected Stagwell media agency Assembly as its global integrated media AOR following a review. The agency will handle all global integrated media efforts across paid, earned, and owned media channels for the many brands—Fossil, Michele, Relic, Skagen, and Zodiac, and licensed brands (Armani Exchange, Diesel, DKNY, Emporio Armani, Kate Spade New York, Michael Kors, and Tory Burch).
- San Francisco-based clothier **Gap Inc.** selected Omnicom Group as its media AOR following a review. The agency will support its many brands—Old Navy, Banana Republic, Athleta, and Gap in the US, Japan, and Canada—replacing incumbents PHD and PMG. A team from across Omnicom Media Group, including OMD, PHD, and Hearts & Science, will serve the client.
- Luxury jewelry brand **David Yurman Inc.** selected Omnicom Media Group's PHD as its global media AOR following a review and replacing incumbent mSix&Partners (now T&Pm). The agency will handle all traditional and digital media in the US, Canada, France, and the UK and rely on its Omni platform and AaaP operating model.
- Apparel brand **Hanes Brand Inc.** selected independent LA-based agency Special U.S. as its creative AOR following a review, replacing 22-year incumbent Interpublic Group's The Martin Agency. The agency will handle all brand strategy and creative development work for the brand out of its New York office and partner with the brand's media AOR, Omnicom Group's Hearts & Science.
- French luxury retailer **Printemps** selected independent New York-based Milk Agency as its AOR in the US. The agency will handle all advertising, social media, and paid media across fashion and retail outlets, including print, out-of-home, video, digital, social, and mobile for Printemps U.S.
- Global outdoor apparel and equipment brand **Columbia Sportswear** selected adam&eveDDB as its global creative AOR for the Columbia brand. The agency will serve the account from its London, New York, and San Francisco offices.
- Footwear and accessories retailer **Designer Shoe Warehouse** selected Stagwell-owned Crispin as its creative AOR, the first one for the brand, which previously worked with several project-based agencies, following a review. The agency, which handles social media for the brand, will now also handle brand strategy, visual identity, and integrated marketing.
- Berlin-based online retailer **Zalando** selected Crossmedia as its new global media AOR following a review. The agency will handle global strategy, planning, and local market coordination in partnership with the brand's in-house media agency team.



Automobile

- **BMW of North America** consolidated its US marketing activities (creative, digital, CRM, and social media) for BMW, Mini, and BMW Group Financial Services under Omnicom Group, which recently won the media planning and buying business for the automobile brand, following a review. BMW awarded its CRM business to The Javelin Agency (replacing incumbent IPG's Performance Art) and its social media to 180/NY (replacing incumbent Anchor Worldwide). Six-year incumbent Goodby, Silverstein & Partners retains its role as lead creative agency for BMW and adds new responsibilities for Mini (replacing creative incumbent Pereira O'Dell and CRM incumbent Dentsu's Merkle) and BMW Group Financial Services while Critical Mass retained digital duties for BMW and Mini but also added BMW Group Financial Services.
- 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.
- **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.
- **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.
- **General Motors** selected 72andSunny (handling Cadillac), Anomaly (Chevrolet), Preacher (GMC), and Mother (Buick) as creative lead agencies. The move includes a new mix of current and new agencies but no longer operates with an AOR structure. They also selected Omnicom Precision Marketing Group as the lead agency for CRM. Monks (formerly Media. Monks) will lead real-time content development for the brand. The agencies will collaborate with Dentsu, the brand's media AOR. Incumbent agencies (Interpublic's Commonwealth/McCann and Publicis Groupe's Leo Burnett) remain on the roster.
- German automobile giant **Volkswagen Group** (VW, Audi, and Škoda) selected Omnicom's PHD as its media AOR, successfully retaining the account. Omnicom has been pushing the agency-as-a-platform approach, a flexible, agile, speedy and fully integrated team combining Omnicom's best tools, capabilities, and talent.

- Automaker **Volkswagen** retained and extended its global creative account (which includes Volkswagen, Audi, and Porsche brands) with Omnicom's DDB for the next three years without a review (and leveraging shops such as AlmapBBDO, Omnicom Precision Marketing Group, and Interbrand as part of a global bespoke team). Volkswagen, which worked with DDB for more than six decades, recently retained PHD as its media AOR. Volkswagen Group's creative agencies also include Ogilvy and Grabarz & Partner.

Consumer Packaged Goods (CPG)

- Consumer packaged goods marketer **Church & Dwight** selected GroupM agency Wavemaker as its US media AOR following a review. Wavemaker was the incumbent, retaining the account after 18 years.
- **Clorox Co.** selected IPG's FCB as its creative AOR, consolidating US creative assignments, which now include Burt's Bees, Kingsford, Fresh Step, Brita, Clorox, Hidden Valley, Glad, and other brand assignments by the same agency, replacing incumbent Dentsu Creative. Omnicom Media Group's OMD will continue to handle media duties.
- **Cotton Incorporated** selected GALE as its strategic and creative marketing AOR following a review, replacing 20-year incumbent adam&eveDDB.
- Unilever brand **Seventh Generation** selected Mother New York as its creative AOR following a review, replacing incumbent Portland, Oregon-based Opinionated. The agency will handle brand strategy, execution, and repositioning.
- **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.
- Fire pits brand **Solo Stove** selected independent PMG as its media AOR. The agency will partner with several creative agencies, including The Martin Agency.
- Consumer health company **Kenvue** (a spinoff from Johnson & Johnson and owner of brands like Listerine, Neutrogena, Aveeno, Tylenol, Band-Aid, Motrin, Benadryl, Clean & Clear, Lactaid, and Rogaine) selected Interpublic Group of Cos.' FCB and Omnicom's BBDO as its AORs across several of its brands. The firm will continue to work with Stagwell's Doner and Deutsch NY.
- Global paint, primer, and coatings brand marketer **Rust-Oleum** selected Dallas-based Arm Candy as its media AOR. The agency will handle integrated strategy, media planning and buying, all retail media, and media mix modeling.



- Natural pet food company **Wellness Pet** selected Stagwell-owned Colle McVoy as its full-service AOR following a review. The agency will handle all duties for the brand portfolio, including Wellness, Wellness WHIMZEES, Wellness Old Mother Hubbard, Wellness Good Dog, Wellness Good Kitty, Sojos, Holistic Select, and Eagle Pack.
- Hybrid cookware brand **HexClad** selected female-founded, independent agency Joan as its creative AOR. The agency will handle new positioning, strategic, and creative development.
- Consumer home, outdoor, beauty, and wellness brand firm **Helen of Troy** selected Publicis Groupe-owned Razorfish as its creative AOR for the US market following a review. The agency will handle all creative duties for Helen of Troy's brands, including Bed Head, Hydro Flask, and Revlon.
- **Unilever** consolidated creative and strategic duties for its beauty brands globally with WPP, which will handle work for TRESemmé, Sunsilk, Simple, Nexxus, Shea Moisture, Clear, and Pond's, and continue work on Vaseline, replacing incumbents Interpublic Group, Omnicom Group, and Brandtech Group's Oliver. Oliver will continue to staff Unilever's global U-Studio in-house creative operations.
- **Unilever** completed its global media review, reshuffling work between its roster of media agencies, which included adding commerce media previously handled by Publicis Groupe to WPP's Mindshare. WPP, Interpublic Group's Initiative, and Dentsu picked up assignments while Omnicom Media Group and Publicis lost some.

Entertainment and media

- Sports betting app **BetMGM** selected Chicago-based independent full-service agency Highdive as its creative AOR, replacing incumbent Stagwell's 72andSunny. The agency will partner with global digital agency DEPT.
- 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.
- The National Hockey League's **Anaheim Ducks** selected Havas Group-owned Battery as its creative AOR following a review. The agency will handle creative strategy, brand narrative, and integrated-marketing content, including social, TV/OTT, OOH, radio, digital, and experiential.
- Warner Bros. Discovery's **Max**, following a review, selected Droga5 to lead experiential marketing for the release of the upcoming series "Dune: Prophecy." The agency previously worked with HBO on another property.
- Media and entertainment giant **Sky** selected Publicis Media (and its media agency Zenith) as its European media AOR following a review, replacing incumbent GroupM's EssenceMediacom. The agency will handle all media duties in the UK, Ireland, Italy, Germany, Switzerland, and Austria.

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: agencymania.com/rosterdeliver-capabilities.

Approved Capabilities

able, formation.

RosterDeliver™



Financial services

- **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.
- Fintech company **MoneyGram** selected four agencies as its AORs following a review: Prophet for brand strategy, Cutwater for creative and production (including TVC, OLV, social, retail, and display), DEPT UK for social, and iProspect for media.



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**

Martin.

- **Rocket Companies** selected independent agency Mirimar Creative Group as its creative AOR following a review. The agency has been working with the brand in the three months prior to the review.
- Credit Union Vancity selected **Havas Media Network** as its national media AOR in Canada following a review. The agency will handle all media duties and leverage data consultancy Noise Digital, which Havas Media acquired last year. Havas will partner with the brand's creative AOR, VML.
- **Rocket Companies** selected Publicis Groupe as its media AOR following a review, replacing incumbent IPG's UM. The agency will work on the brand portfolio including Rocket Mortgage, Rocket Homes, Rocket Money, Lendesk, Amrock, Core Digital Media, and Woodward Capital Management. The Publicis Groupe is a team composed of Publicis and its technology, resources, and leadership and Publicis-owned Zenith.

- Global investment management firm **T. Rowe Price** selected Stagwell's Code and Theory following a review, replacing incumbents Publicis Groupe's Digitas New York and Stagwell's Assembly. The agency will transform its global digital footprint through a refreshed global design system and digital assets.
- Retirement and wealth management brand **Empower** selected Goodby, Silverstein & Partners as its new creative AOR, following a review and replacing incumbent creative shop Pereira O'Dell. The agency will handle all the brand's strategic and creative marketing efforts.

Food and beverage

- Ice cream brand **Breyers** selected WPP's Wunderman Thompson New York (becoming VML) as the brand's strategy and creative AOR in the US, following a review, replacing incumbent Omnicom's DDB.
- Nestlé's **Coffee mate** selected independent creative agency Wieden+Kennedy New York as its new AOR following a review. The agency will handle brand strategy, creative development, and social, as well as lead the brand's interagency team.
- Dairy brand and cheesemaker **Crystal Farms** selected Colle McVoy as its creative AOR following a review. The agency will handle all media planning and buying, social strategy, and creative content development for the brand.
- Fast-food franchise **Denny's Corporation** selected Mindshare, part of GroupM and WPP, as its US media AOR. The agency will handle audience and media strategy, planning, investment, measurement, and data and analytics. The brand also selected FINN Partners as its public relations and brand communications AOR.
- California-based premium chocolatier **Ghirardelli Chocolate** selected IPG's Mullen Lowe as its creative AOR, replacing incumbent FCB West following a review.
- General Mills' luxury ice cream brand **Häagen-Dazs** selected Bartle Bogle Hegarty (BBH) as its global creative AOR following a review, replacing five-year incumbent Forsman & Bodenfors. The brand previously worked with BBH for six years nearly three decades ago.
- Doughnut chain **Krispy Kreme** selected WPP VML as its new creative and media AOR, replacing incumbent FleishmanHillard, which will still handle PR. WPP VML will handle creative strategy, visual identity, e-commerce, and global and US creative and media responsibilities.
- **Papa Johns** selected The Martin Agency as its lead creative AOR following a review, replacing incumbent Camp + King. The agency will partner with Dentsu's Carat, its recently appointed US media AOR.



- Liquor giant **Pernod Ricard USA** selected Argonaut as its US creative AOR for Jefferson's Bourbon, expanding the work done by the agency for other brands (e.g., Código 1520 Tequila). The agency will handle all strategic and creative work.
- **Pizza Hut** selected Mischief @ No Fixed Address as its social AOR. The agency will join Pizza Hut's roster of marketing agencies, including GSD&M (creative AOR) and Spark Foundry (media).
- Mexican fast-casual chain **Qdoba** selected Leo Burnett as creative AOR.
- Inspire Brands-owned Atlanta-based **Sonic Drive-In** selected Mother as its creative AOR following a review. Mother was the four-year incumbent agency, successfully retaining the account.
- Boston Beer Co.'s seltzer and spirit brand **Truly** selected Omnicom agency Goodby, Silverstein & Partners following a review, replacing incumbent WPP Ogilvy. The agency lost the creative account a year ago but continued to work on other Boston Beer-owned brands such as Sam Adams.
- 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.
- 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.
- **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.
- 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' **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).
- 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.
- **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.
- **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.
- 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.
- Organic meat brand **Applegate**, a Hormel Foods company, selected independent agency BarkleyOKRP as its creative AOR, the first major win for the agency since Barkley and OKRP merged. Barkley has overseen creative and strategy for Hormel Foods' Justin's brand since 2019.
- **E&J Gallo Winery** selected VaynerMedia LA as its creative AOR in the US for the Barefoot Wine brand following a review. The agency will handle all creative and organic social media for the brand in partnership with other roster agencies.
- Restaurant Brands International-owned and Florida-based sandwich chain **Firehouse Subs** selected Orchard as its creative AOR and PHD as its media AOR following a review, replacing incumbent The Richards Group. The AORs will collaborate with Chicago-based Quality Meats for activations and partnerships; Columbus, Ohio-based 500 Degrees for merchandising; Norwalk, Connecticut-based ICR for PR; and London-based Jones Knowles Ritchie for design.
- Fermented food and beverages marketer **GT's Living Foods** selected Canvas Worldwide as its new media AOR, replacing incumbent Stagwell's Assembly.



- Burger chain **Red Robin** selected Carmichael Lynch as its creative AOR following a review. The agency will handle strategy, creative advertising campaigns, strategic brand stewardship, in-market activations, and social. The client previously worked on a project basis with various agencies.
- Saucy chicken restaurant chain **Zaxby's** selected Dentsu X as its media AOR following a review, replacing incumbent Empower Media. The agency will handle all media buying and planning for the brand.
- Diemme Food-owned plant-based meat alternative brand **Altro Food USA** selected performance-marketing agency Sweet Science Marketing as its AOR. The agency will handle multichannel marketing, including digital advertising, influencer partnerships, e-commerce, and targeted consumer-generated content.
- American plant-based meat company **Beyond Meat** selected independent London-based creative agency Isobel as its Pan-European creative AOR following a review. The agency will handle brand consultancy, design, advertising, social, influencer, PR, and branded content.
- **Constellation Brands** selected Omnicom-owned and Austin, Texas-based GSD&M as the lead creative AOR for Corona Extra following a review, replacing incumbent Interpublic Group-owned Mullen Lowe West.
- Berkshire Hathaway-owned **American Dairy Queen Corp.** selected independent New York-based shop SPCSH (which recently re-branded from Big Spaceship) as its creative AOR in the US following a review, replacing incumbent Barkley. The agency will handle strategy, creative, and social media and partner with Publicis's Spark Foundry, its media AOR in the US.
- **Ferrero Group** selected Interpublic Group's McCann Worldgroup as its creative AOR for Kinder and Tic Tac in Europe, Asia Pacific, the Middle East, and Africa, and Publicis Groupe to support the aforementioned regions, along with some work in North America. Stagwell's Anomaly will handle some of Ferrero Group's North American creative work, including Kinder and six other "important" North America brands. They will partner with Dentsu's iProspect, the brand's media AOR.
- Froneri-owned ice cream brand **Häagen-Dazs** selected indie shop nice&frank (Ad Age's 2024 Newcomer of the Year) as its creative AOR in the US following a review and replacing incumbent Cartwright.
- Candy giant **Hershey Co.** selected Publicis and its bespoke Publicis team, MiltonONE, as its media AOR in the US following a review, replacing several agencies, including Dentsu, Horizon Media, Harmelin Media, and Omnicom in a move to "centralize integrated media responsibilities." The agency will handle media for Hershey's candy, mint, gum, salty snacks, and protein business units in the US.
- Low-sugar chocolate brand **JOJO's Chocolate** selected Milwaukee-based independent agency Hanson Dodge as its creative AOR without a review. There was no incumbent agency. The agency will handle strategy, brand, and creative development.
- Brown-Forman-owned Tennessee whiskey brand **Jack Daniel's** selected independent creative agency Five by Five as its UK digital and social media AOR following a review, replacing incumbent Iris. The agency will handle social media, content creation, and influencer marketing.
- California champagne producer **Korbel** selected Minneapolis-based Interpublic Group-owned Carmichael Lynch as its brand and media AOR following a review. The agency will handle strategy, creative, social, media, and brand activation.
- Cereal breakfast foods company **Kellanova** expanded its relationship with Interpublic Group after a review. IPG's FCB will handle Cheez-It (in the US), Eggo, and Rice Krispies Treats, partnering with The Martin Agency and MullenLowe across global markets, as well as handle Pringles, replacing incumbent WPP Grey and Publicis Groupe's Leo Burnett. Publicis retained media duties in North America as well as the Pop-Tarts brand (via its Le Truc agency) while working on multiple brands in Europe and Latin America. Tombras will handle creative and integrated marketing work for MorningStar Farms, Nutri-Grain, Club Crackers, Toasteds, and TownHouse in the US. Rethink retained RXBar. IPG's Momentum will handle shopper marketing and promotion, and IPG studios will handle production globally. IPG's Weber Shandwick will continue to run PR and influencer strategy for Kellanova's bigger brands in the US.
- **LaLa U.S.** and Promised Land Dairy Products selected Austin, Texas-based agency Bakery as its creative AOR following a review, replacing incumbent Upshot. The agency will handle all creative work running on social media, TV, OOH, and digital.
- Tequila brand **Lobos 1707** selected Hudson Rouge, a luxury boutique agency within the VML network, to lead strategy and creative work for the LeBron James-backed "super-premium" brand. The agency will collaborate with sibling WPP agency Landor.
- **Mondelēz** International's Oreo brand selected digital commerce agency Goodness as its e-commerce AOR, responsible for leading Oreo.com's direct-to-consumer growth as an e-commerce platform, including Oreoid, the brand's custom cookie creator. The agency also works for another Mondelēz brand, Clif Bar.
- Panda Restaurant Group-owned American Chinese fast-food chain **Panda Express** selected Portland, Oregon-based indie shop Opinionated as its creative AOR following a review, replacing five-year incumbent The Many. Opinionated consulted with multicultural agency TDW+Co to connect with Asian communities and win the business.
- Wines and spirits marketer **Pernod Ricard** consolidated its media account in the Europe and Middle East & Africa region with Dentsu's Carat, replacing incumbents GroupM, Havas, Omnicom, and MG.
- Gourmet coffee brand **San Francisco Bay Coffee** selected Cutwater as its creative and media AOR following a review. The agency will handle brand platform development, creative, production, and strategy, including OLV, social, display, and OOH.



- Energy and health drinks brand **Zipfizz** selected agency Designit, part of multinational IT firm Wipro, as its creative and media AOR, the first time the brand assigned an AOR. The agency will handle multichannel support across brand strategy, paid media, social media, and creative, as well as data, social content creation, and community management for Zipfizz-owned channels, including on Instagram, Facebook, and TikTok.
- Atlanta-based quick-service restaurant chain **Zaxby's** selected Omnicom Group's Goodby Silverstein & Partners as its creative AOR following a review, replacing six-year incumbent independent Tombras. GS&P's New York office will lead the account with support from the San Francisco office and partner with media AOR Dentsu X.
- Leading provider of refrigerated, ready-to-eat Hispanic foods **Del Real Foods**, selected TDA Boulder as its integrated AOR. The agency will handle all creative and media duties.
- Food marketer **General Mills** selected Goodby Silverstein & Partners, The Martin Agency, and Mother as part of its creative AOR roster following a review, possibly replacing incumbents Anomaly, and Pereira O'Dell. The agencies will partner with the brand's global media AOR, Interpublic Group's UM.
- **KFC** moved from a lead creative model (with MullenLowe as its US creative AOR) to an agency roster model for its US creative business. As a result, MullenLowe will continue to work on projects alongside other agencies, such as Highdive Advertising.
- **Pepsi** selected Omnicom Group's BBDO without a review, adding the agency that worked with the brand for more than 48 years to the brand's agency roster (which includes VaynerMedia, TracyLocke, Motive, Alma, and OMD). The brand uses agencies on a project-to-project basis and its in-house agency, CLS.

ARTICLE

Discovering Pearls:

How to Find the Perfect Agency Partner



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- Italian beer brand **Peroni Nastro Azzurro** selected Interpublic's McCann Worldgroup as its global AOR following a review, replacing incumbent London-based agency Trouble Maker. McCann London will lead the account.
- Food company **Rich Products Corporation** selected Interpublic Group's EP+Co as its creative AOR for six of its brands (SeaPak, Farm Rich, f'real, Christie Cookie Co., Morey's Fresh Fish & Seafood, and Rich's) following a review. The agency will handle integrated campaigns, platform development and execution, brand identity development, social, experiential, and influencer marketing.
- Constellation Brands-owned Vodka brand **Svedka** selected New York-based DCX Growth Accelerator as its creative AOR following a review, replacing incumbent Cashmere.



When you unlock the power of subject matter experts, you allow the best ideas to flow forward and create campaigns that are more innovative.”

Diana Haussling
SVP and GM of Consumer Experience and Growth,
Colgate-Palmolive



COLGATE-PALMOLIVE

- **WeightWatchers** selected WPP's Ogilvy as its global creative AOR. The brand tasked the agency to build on the brand's 60-year legacy and evolve consumer engagement and culture.
- Italian company **Andriani** selected New York-based StrawberryFrog as its US creative AOR following a review. The agency will handle work related to the client's gluten-free and GMO-free pasta brand, Felicia.
- Baking company **Bimbo Bakeries** selected Omnicom and WPP's branding and design agency Landor as its main AORs in the US following a review. Omnicom will handle creative strategy, social, influencers, PR, commerce, production, and media. The agencies will partner with the firm's media AOR, Omnicom's PHD. WPP Landor will handle strategic packaging initiatives across its portfolio. Agencies such as Legion, Leconda, and Firehouse will continue supporting existing work.

- Korean fried chicken chain **Bonchon** hired Denver-based Carson+Doyle as its creative and strategy AOR in the US following a review and replacing incumbent St. Louis agency Propaganda. Carson+Doyle is a small, full-service creative agency that connects brands and Gen Z.
- **California Pizza Kitchen** selected Iris Worldwide as its first creative and social AORs, as well as Push for special projects, Acadia for performance media, and Blue Engine for PR, following a review. The brand previously handled creative in-house. Iris Worldwide will handle creative, brand strategy, and positioning.
- Danish multinational brewer **Carlsberg Group** selected London-based We Are Social as its social media AOR following a review. The agency will partner with the brand's media AOR, Dentsu's iProspect, on the brand portfolio including Tuborg, Somersby, and 1664 Blanc.
- Water filtration company **Culligan** selected Highdive as its first global brand AOR following a review. The agency will handle brand platforms and campaigns, as well as creativity for certain product lines in partnership with the newly appointed PR firm, Zeno Group.
- **Campbell's** Goldfish selected Mischief @ No Fixed Address as its creative AOR, replacing incumbent Publicis Groupe's Saatchi & Saatchi and Leo Burnett, which will remain active on other Campbell's brands.
- Pizza chain brand **Little Caesars** selected IPG media agency Mediahub as its US media AOR following a review. The brand assigned Mediahub to handle media planning, buying, analytics, and audience strategy in addition to Mediahub's Radical and Disruptive Lab.
- Seattle-based chain **MOD Pizza** selected Chicago-based Cramer-Krasselt as its media and social AOR following a review. The agency will handle media, creative, and analytics.
- Seattle-based coffee giant **Starbucks** selected a WPP bespoke unit called "Team Starbucks" (which includes VML, Ogilvy, and Landor) to handle its US creative business, following a review and replacing seven-year incumbent New York-based shop SPCSHP. The WPP team will partner with the brand's US media AOR, Publicis Groupe's Spark Foundry.

Insurance

- Insurance and asset management giant **Allianz Group** selected GroupM as its global media AOR. GroupM's EssenceMediacom retains its business in nine markets, including the US. GroupM agencies pick up 20 additional markets as part of the win, replacing incumbents Omnicom, Publicis, and Jellyfish.
- **Liberty Mutual Insurance** selected independent New York-based agency Bandits & Friends as its creative AOR following a review, replacing incumbent Goodby Silverstein & Partners. The agency will act as lead partner to its internal creative shop, Copper Giants.



Personal care

- Smart ring company **Ōura** selected IPG's Mediahub LA as its global media AOR following a review. The company's media was previously handled internally with the help of small shops. The brand does not have a creative AOR.
- 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.
- 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).
- **Christina Aguilera Fragrances** selected Kubbcoco as its social media AOR following a review. The agency will handle social media strategy, production, brand presence, and community management for the portfolio fragrances Signature, Definition, and Xtina.
- **Colgate-Palmolive** selected WPP as its Amazon AOR in its key markets in Europe, consolidating Amazon media activities and supporting Colgate-Palmolive's oral care, personal care, and home care businesses with a single company, following a review. It's a move to adopt a more data-driven, full-funnel approach to Amazon in order to accelerate omnichannel brand and sales impact via Amazon's Retail, Integrated Amazon Advertising, and Amazon cloud-based clean room solutions. The WPP bespoke solution, led by VML's Amazon Center of Excellence in Luxembourg, and in partnership with GroupM's Wavemaker, will forge a deeper connection between sales, media, and brand teams.
- **L'Oréal International Distribution** selected GroupM's Wavemaker to handle media planning and buying for EMEA following a review, replacing incumbent OMD. The win signals further expansion of the L'Oréal-Wavemaker partnership, which includes 30+ markets across the world.
- Cosmetics chain **Ulta Beauty** selected IPG's Mediabrands as its media AOR, expanding its relationship with IPG and creating a bespoke New York-based unit within the Mediabrands network called Team Beauty, which includes Mediahub and Kinesso. The agency will handle all media duties, including programmatic, retail media, addressable, and social.
- **L'Oréal International Distribution** selected GroupM's Wavemaker as its media planning and buying AOR for EMEA following a review.
- **Revlon** selected independent creative agency Terri & Sandy as its lead agency on four brands (Almay, Mitchum, Creme of Nature, and American Crew) following a review, replacing various incumbents. The agency will handle creative, branding, and digital.

- Skin care brand **Tree Hut** selected indie Austin, Texas-based creative shop Bakery as its first AOR, replacing a mix of project-based agency relationships and its in-house agency team. The agency will handle event activations, event marketing, video production, print, and TV in addition to digital and social work.

Other

- **Dow Jones** selected Mother as its lead creative and strategic AOR, IPG's Mediahub as its media planning and buying AOR, and eg+ Worldwide to lead its production efforts following a review. Mediahub will work closely with the in-house media team on strategy, planning, activation, and measurement of its data-driven marketing solutions.
- **The US Air Force** selected Cincinnati-based independent agency CourtAvenue as its integrated AOR as part of a nine-year assignment. The agency will handle communication, storytelling, digital media and marketing, digital consumer experience, go-to-market strategy, and implementation. The agency was the Air Force's digital AOR.

Manufacturing

- **Stanley Black & Decker** selected Young & Laramore as its creative AOR for subsidiary Dewalt tools following a review. The agency will handle the brand's strategy and creative development.
- 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.
- German engineering and electronics company **Bosch** selected Accenture Song's Droga5 as creative AOR and Dentsu's Carat as its media AOR in the US following a review. The brand is consolidating its creative efforts under one shop, replacing several agencies. The agency will handle TV, digital, social media, and trade shows. Bosch also selected Germany's Mediaplus (part of agency group Serviceplan) as its global media AOR, following a review and replacing incumbent Dentsu's Carat. The agency will handle media strategy, planning, and purchasing for 10 Bosch business units in 38 countries.
- France-based tire company **Michelin** selected Omnicom Media Group to be its global media AOR following a review, replacing seven-year incumbent Havas. The agency will handle all media duties, including planning and buying, for the brand.



Pharma and health

- French pharmaceutical giant **Sanofi Consumer Healthcare North America** selected The Martin Agency as its creative AOR, consolidating its business and replacing incumbents Terri & Sandy and Saatchi & Saatchi Wellness (which retains some work). The agency will handle various brands including Icy Hot, Gold Bond, Cortizone-10, Aspercreme, Xyzal, Act oral care, Unisom, Nasacort, Selsun Blue, and Zantac.
- **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.
- 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.
- 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.
- Feminine hygiene brand **pH-D** selected Cincinnati-based Curiosity as its creative and social AOR following a review, replacing New York-based incumbent and woman-owned Fancy.
- Pharmaceutical giant **AstraZeneca** selected WPP to its global creative roster to handle its oncology business following a review. WPP, which is creating a bespoke team based in the US and UK and composed of VML Health, Grey Health, and Ogilvy Health, is expected to share the oncology business with one of the brand's existing agency partners, Omnicom. WPP's CMI Media Group retains its media planning and buying AOR. There is no expected impact to the IPG Health relationship with the brand.
- Health organization **Truth Initiative** selected IPG's Initiative as its media AOR following a review, replacing 10-year incumbent Stagwell's Gale.
- Nutrition and wellness company **Wellmore Holdings** selected Minneapolis-based creative agency Betty as its creative AOR following a review. The agency will handle creative, strategy, design, and content studios.
- **Reckitt Nutrition** selected Dentsu's iProspect as its media AOR in the US following a review, expanding its preexisting relationship between Reckitt Nutrition and iProspect, which handled its media for more than five years in key markets across EMEA and APAC. The agency will handle all insight-based media strategies and execution, leveraging Dentsu's proprietary Merkury global data and consumer identity platform.

- Biotechnology giant **Amgen** selected Interpublic Group's Mediabrands as its US media AOR, following a review and replacing incumbents Omnicom's Hearts & Science and WPP's GroupM. IPG Mediabrands created a bespoke team to manage media planning and buying for the entire company's brand portfolio.
- Pharmaceutical giant **Moderna** selected independent agency Known as its media AOR, replacing incumbent Omnicom's Hearts & Science. The agency will handle media planning and buying across all channels, leveraging its proprietary "Skeptic" technology

Retail

- Home improvement retailer **Wickes** selected independent agency St Luke's as its lead creative AOR following a review. The agency will handle creative advertising for the brand across TV, VOD, and radio.
- Heritage sports apparel and equipment brand **Wilson Sporting Goods Company** selected Stagwell's 72andSunny as its creative AOR following a review.
- 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.
- 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.
- 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.
- 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.
- Leading outdoor retailer **Christy Sports** selected TDA Boulder as its creative AOR following a review. The agency will handle all creative and strategy including branding, print, video, and content creation.
- Florida-based, family-owned furniture store **City Furniture** selected Miami-based agency Alma as its strategic and creative AOR following a review, in a move to develop its new and long-term brand platform.



- The home goods retailer **Ikea** selected Dentsu's Carat as its media AOR in the US, replacing six-year incumbent Wavemaker, part of WPP's GroupM. Dentsu already handles media in other global markets, including Canada, China, South Korea, UK, Ireland, Sweden, Spain, Finland, Denmark, Slovakia, and Hungary for the brand.
- Supermarket chain **Stop & Shop** (owned by Dutch food retail group Ahold Delhaize) selected Cincinnati-based Curiosity as its creative AOR following a review, replacing incumbent McKinney. Curiosity, a standout on Ad Age's 2024 Agency A-list, will handle branding, strategic planning, and creative campaigns.
- Stamford, Connecticut-based sustainable home furnishing brand **The Lovesac Co.** selected Omnicom Media Group agency Hearts & Science as its media AOR in the US, replacing incumbent Marketsmith. The agency will handle integrated media strategy, planning, buying, and measurement, while leveraging Omnicom's data platform, Omni.
- Furniture company **American Signature, Inc.** selected Minneapolis-based Colle McVoy (Adweek's 2023 Midsized Agency of the Year) as its strategy, creative and media AOR following a review. The agency will handle brand strategy, media, creativity, and design.
- **The Lego Group** selected Publicis as its global media AOR following a review, replacing the seven-year incumbent IPG agency Initiative. Publicis created a bespoke team called Publicis One led by Starcom.
- **eBay** selected Dentsu's iProspect as its global media AOR following a review, replacing five-year incumbent WPP-owned GroupM's EssenceMediacom. The agency will partner with indie shop Joan.
- New York-based craft marketplace **Etsy** selected Interpublic Group's Mediahub as its new media AOR, replacing six-year incumbent Ocean Media. The agency will collaborate with Etsy's creative AOR, Orchard.

Technology

- **Samsung Electronics** selected Chicago-based agency Quality Meats as its lead creative AOR for its home entertainment business in the US following a review. The agency will handle all creative, influencer, and social work for Samsung-branded TV, audio, and memory products.
- **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.
- **Honeywell** selected Dentsu Creative and Carat USA as its integrated AOR, combining media and creative capabilities together. The two agencies will build solutions that will drive growth through human-centric connections for the brand.
- Enterprise workflow management platform **ServiceNow** selected PMG as its global media AOR. The agency will handle all media planning and buying.
- E-commerce giant **Amazon** selected WPP and Omnicom Media Group as its global media AORs for its consumer business following a review, splitting an estimated \$5 billion budget and replacing the incumbent of more than 10 years, IPG Media brands, and the brand's in-house team. OMG will handle the Americas while WPP will handle Europe, the Middle East and Africa, and Asia Pacific. IPG is expected to remain the global media partner for Amazon Web Services, Amazon Business, and Amazon Ads.
- Software giant **Adobe** selected Stagwell network (and its agencies 72andSunny, Code and Theory, Locaria, Movers+Shakers, National Research Group) as its global creative agency for its digital media business, Dentsu Creative as its lead global scaled creative and content AOR for digital media, and holding company Omnicom Group as its creative AOR for its Adobe's Digital Experience business following a review. The agencies will partner with Wavemaker and Publicis Media, the brand's global media AORs.

Travel and accommodations

- **MGM Resorts International** selected independent Mischief @ No Fixed Address as its creative AOR without a review, replacing decade-long incumbent IPG-owned McCann Worldgroup. The agency will handle creative across all of the global hospitality and entertainment company's brands, including Bellagio, ARIA, The Cosmopolitan of Las Vegas, and MGM Grand.
- 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.
- **Carnival Cruise Line** selected TBWA\Chiat\Day New York as its creative AOR following a review. The agency will handle all creative duties, with a focus on driving growth for the brand.
- UK estate agent firm **Hamptons** selected Atomic London as its creative AOR. The agency will partner with the brand's media-buying agency Total Media and handle social media as well through Supernova, its social-creator agency.
- **MGM Resorts International** (owner of brand properties Bellagio, ARIA, The Cosmopolitan of Las Vegas, MGM Grand, and Mandalay Bay) selected Viral Nation its social media and influencer marketing AOR. The agency will handle strategy, execution, and implementation across its entire brand ambassador program.



- Online travel firm **Priceline** selected Omnicom Media Group's PHD as its new media AOR following a review, replacing incumbent agency Ocean Media. The agency will handle all media activities, including data-driven media strategy, planning, and buying and partner with the brand's creative AOR, Mirimar.
- **Princess Cruises** selected Omnicom precision marketing agency Rapp as its direct response marketing AOR. The agency will handle all CRM communications, including strategy, creative development, deployment, reporting, and insights.
- Low-cost carrier **Spirit Airlines** selected Tombras as its integrated AOR without a review. The agency will handle creative, media, PR, social, and CRM.
- **Choice Hotels International** (owner of brands such as Comfort, Quality Inn, and Radisson Hotels Americas) selected Stagwell agency 72andSunny New York and Dentsu X as creative and digital media AOR, respectively. 72andSunny New York replaces incumbent McKinney. Dentsu X, which will handle traditional TV and online ads, social media, podcasts, and other media channels, replaces incumbents Havas Media and BCM. Havas Media will continue to handle TV media planning and buying for the brand.
- **Sandals Resorts** selected Chicago-based Leo Burnett as its global creative AOR following a review. The agency will handle all mediums and platforms for the portfolio of Caribbean resorts, including the adults-only Sandals and family-friendly Beaches.
- **Wyndham Hotels & Resorts** selected Havas as its North American consumer marketing AOR following a review. The agency will handle creative, media, and all social and digital for all its brands (including LaQuinta, Ramada, and Super 8) in partnership with consumer-PR firm Citizen and other suppliers.
- 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.
- 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.
- **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.
- 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.
- **Frontier Communications** selected McCann New York as its creative AOR. The agency, which handles all creativity, content, audience and connections, and design duties, released its first campaign, "Good to Go."
- EchoStar Corp.-owned prepaid wireless brand **Boost Mobile** selected Boulder, Colorado-based WorkInProgress as its creative AOR without a review, replacing incumbent Chicago-based agency Highdive, which worked for the brand on a project basis.

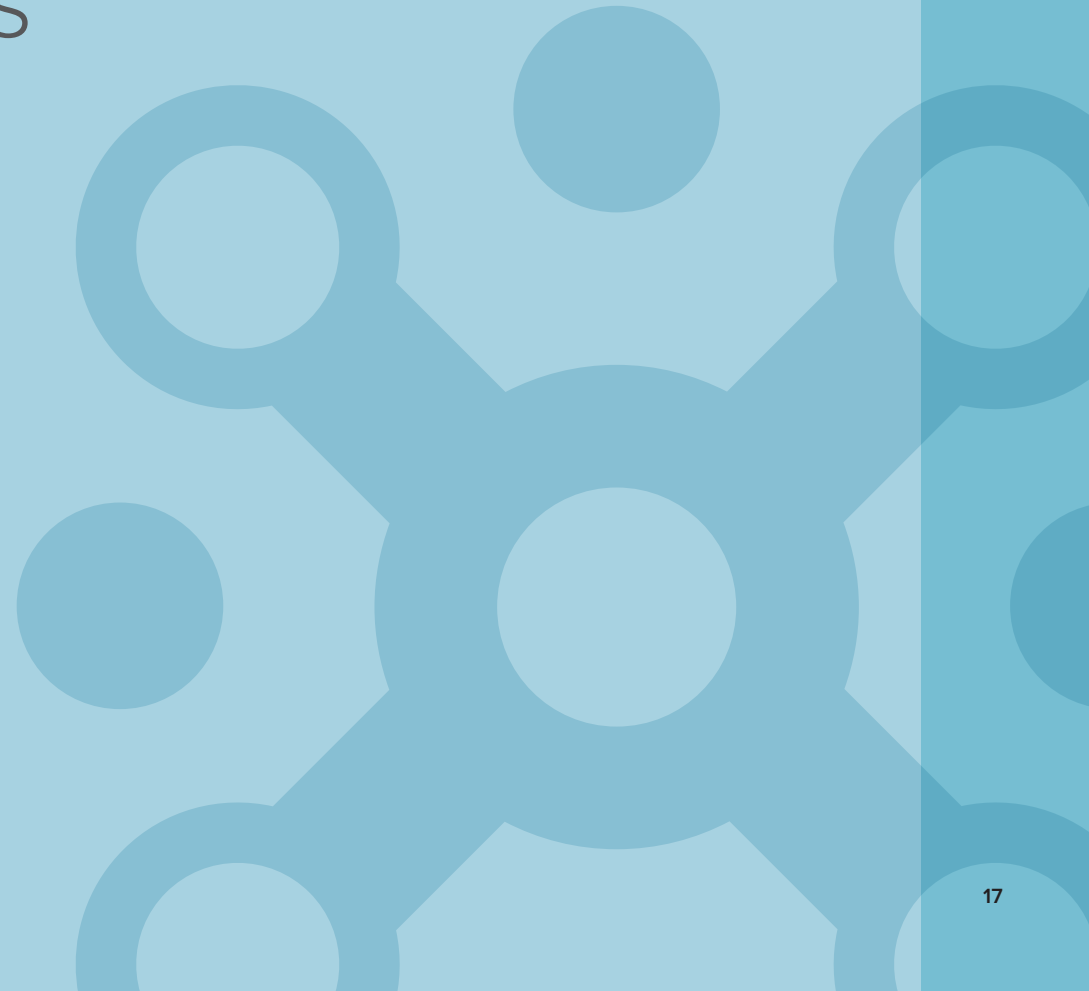
Services

- **T-Mobile US** selected Dentsu Creative as its lead creative AOR following a review, replacing incumbent Publicis Groupe's Saatchi & Saatchi. The agency will handle creative storytelling, social, performance, and cultural fluency and partner with the brand's existing media AOR, Initiative.
- **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.
- Telecom and tech-services company **C Spire** selected creative agency Lewis as its AOR, replacing incumbent agency Tombras, across of its home fiber, wireless, and business divisions. The agency will handle strategic planning, business intelligence, media planning and placement, creative development, and production.
- Tax preparer **H&R Block** selected WPP's Ogilvy One as its customer relationship management AOR. Ogilvy One will serve the account under The Lacek Group, an Ogilvy One company based in Minneapolis, in partnership with Ogilvy New York, H&R Block's creative, brand, and PR AOR.
- Lawn care service provider **TruGreen** selected WPP's VML as its lead creative and social AOR following a review. The agency will partner with roster agencies VML sibling AKQA (lead web agency) and independent agency Tinuiti (lead paid media partner).



Talent

Securing the right
talent and resources





TALENT: Securing the right talent and resources

Year-end summary

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Per Dentsu's 2024 Media Trends Report, AI has the potential to "lead a period of growth for media and a new golden age of creativity." AI continues to dominate conversations at major industry events, from Davos to CES. If AI is to profoundly alter the way business is conducted, it's also naturally poised to transform how marketing and advertising are produced, managed, and continually optimized. AI is now applied to a wide range of disciplines as well as throughout the entire advertising process, from ideation to reporting. It is such a hot topic that the distinguished 4A's recently issued a perspective offering high-level guidance on generative AI for the agency community summarized by the acronym PICA: Participate, Incubate/Investigate, Collaborate, Accelerate. Gearing up for change is the call to action. And it has been heard loud and clear.

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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.

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Some experts predict that as much as 90% of online content will be AI generated. Is that realistic? Insanely high? The progression of generative AI is impressive, no doubt, given the investments and resources allocated to it. Increasingly, brands are looking to combine AI (artificial intelligence) and HI (human intelligence) for optimal creativity, ingenuity, and scalability. AI remains the #1 topic of conversation in advertising and marketing. Brands are investing heavily in partnerships with tech platform providers to incorporate AI into many facets of their enterprise functions, including marketing. Some brands are navigating AI trends carefully, especially when the technology may be overused or be perceived negatively, as in the beauty industry. Unilever-owned Dove recently launched a marketing campaign that highlights the downside of generative AI by showcasing the negative effects of digital manipulation; Dove has pledged to never use AI to create or distort women's images.

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The biggest highlight of summer was the Cannes Lions International Festival of Creativity, the largest and most well-known advertising award show in the world. Brands and agencies gather on beaches, at hotels, on yachts and at The Palais to celebrate their most brilliant work and groundbreaking creativity and to brainstorm the future of the advertising business. The Cannes Lions reached more than 26,000 submissions this year (up 6% for brands and 31% for agencies). Rapidly growing categories are Creative Business Transformation, Creative Commerce, Social & Influencer, and Creative Strategy. Key takeaways: Lead with value, reinvent talent and ways of working, and drive continuous reinvention. Transformation is constant. As expected, generative artificial intelligence was the hottest topic among delegates at Cannes Lions. Brands are asking: Are you giving us what we want or what we need? What they need may not always be that obvious.

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10,500 athletes across 32 sports and 329 events, 206 participating nations, over 1 million tickets sold, 19 world records in seven sports, and a memorable Seine River marathon swim. So yes, one of the advertising highlights of recent months was the Olympics. About 30.6 million people on average watched the Paris Games on Comcast's US media outlets each day (including channels NBC, USA, and the Peacock streaming service), an 82% increase from the Tokyo Olympics, twice the US audience, and twice the number of streams (218 million). The focus in the US is now on the presidential election. Advertising is doing well.

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"Keeping artificial intelligence real" is the brilliant title of a recent article by McKinsey & Company. The author suggests that "keeping humans in the loop is critical for [AI's] responsible development." Concerns have been growing in the ad industry, where generative AI is profoundly changing how work gets done. It was a big topic at the annual Association of National Advertisers (ANA) Masters of Marketing Conference, where visionaries and leaders converge to shape the industry's future. There is no better insight into what CMOs and marketing leaders are focused on, worried about, anticipating, or prioritizing in the coming year. The transformation is underway and there is no turning back. Are we future-fit for growth?

Key takeaways and predictions

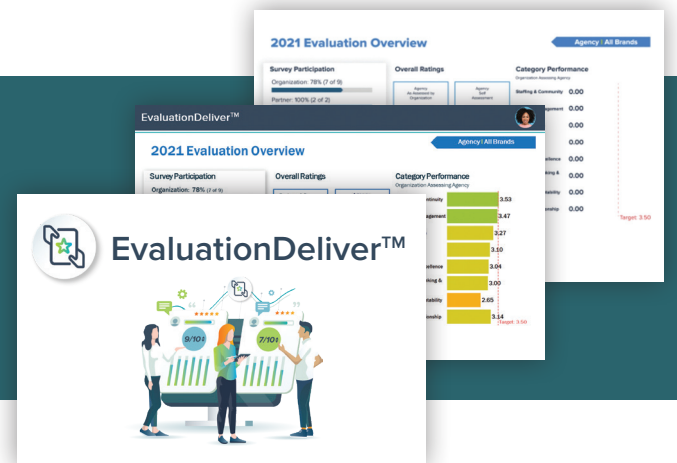
- Per Ad Age, **top CMO issues/concerns in 2024** are: Economic uncertainty; the rise of AI in marketing; the CEO/CMO divide and growing disconnect; challenges in work-from-home and in-office balance; organizing talent; and navigating a tense geopolitical landscape.
- Per Ad Age, **top account reviews in 2023** included Uber, Geico, Kimberly-Clark, Verizon, Constellation Brands, and BMW. The biggest review was Pfizer, with Publicis as the integrated global engine and Interpublic Group of Cos. (IPG) as lead creative partner for a brand spending \$2.8 billion on worldwide advertising. Other noteworthy reviews: Amazon (media), BMW (media, from IPG to Omnicom), Constellation Brands (media, from Horizon Media to IPG's Initiative), Geico (media, from Horizon Media to IPG's Mediabrands), General Mills (media, from WPP GroupM Mindshare to IPG's UM), Kimberly-Clark (media, from WPP GroupM Mindshare to Publicis and its bespoke unit K-C One), Kraft Heinz (media, from Publicis Media's Starcom to Dentsu's Carat), Papa Johns (media with Dentsu's Carat and creative with The Martin Agency), Popeyes (creative with McKinney), Uber (media, from WPP GroupM's Mediacom to Omnicom Media Group), Verizon (creative, from IPG McCann to WPP Ogilvy).
- 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."

- 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 World Federation of Advertisers (WFA) Global Marketer Conference 2024** in Toronto illustrated that brands around the world are increasingly under the spotlight: accountable to people, planet, regulators, and shareholders, and how they could use their powers of creativity and innovation to build better, stronger brands. Among the highlights: IBM asked, Should you put your trust in AI?; AB InBev's CMO talked about reimagining a beer company by developing a culture of sustainable growth; Nissan's corporate VP and CMO discussed driving innovation and sustainable growth in the automobile sector; and WPP and Mastercard spoke about the impact of generative AI on brand growth.
- Per Ad Age, top **CMO concerns** for the second half of 2024:
 1. The US presidential election
 2. Skyrocketing use of AI
 3. DE&I shifts
 4. The measurement conundrum

Need to evaluate your agency partners?

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

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- Five takeaways impacting brands, per **Stagwell at the ANA Masters of Marketing Conference**:
 1. Generative AI, a new norm
 2. Creativity moves mountains, the bottom line, and starts at home
 3. The power of fandom is massive
 4. Customer centricity is business centricity
 5. The skills needed for this new era have evolved
- Top 5 insights from **Response Media** about the **ANA Masters of Marketing Conference**:
 1. AI and personalization: building trust through relevance
 2. Cultural relevance in marketing: moving beyond one-size-fits all
 3. Sustainability in marketing
 4. Personalization at scale: co-creation with customers
 5. Integrated media and cross-channel strategy

Talent

- Per Mercer Island Group, a **CMO checklist before running an agency review**:
 1. Be certain a change is warranted
 2. Make sure the business need is defined
 3. Assign a process leader
 4. Create a plan
 5. Carve out the necessary resources
 6. Match your timeline with the business calendar
 7. Define the scope, deliverables, and budget
 8. Socialize the change internally
 9. Update your MSA
 10. Brief your team
- Per ID Comms, three top tips for **better agency engagement in a pitch**:
 1. Engage agency leadership early
 2. Invest time in a high-quality pitch brief
 3. Get aligned as a team
- Independent agency **Mojo Supermarket** named itself as its own social AOR, in a parody of a trade press announcement. The agency jokingly created a fake news website, “AdRage,” full of humorous content.
- 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 the Mirren Live conference, **five tips for agencies to successfully build a pipeline**:
 1. Give marketers specific solutions
 2. Recognize that not all growth is good
 3. Focus on building existing business
 4. Know when to stop selling
 5. Look for bright spots
- Per Raja Rajamannar, CMO and founding president of healthcare business at **Mastercard**, every brand advertiser must ask prospective agencies these fundamental questions: Is the agency forward thinking? Does it leverage emerging technologies? Does it lead with purpose? Is it inclusive in its team and thinking?
- Per Mitchell Caplan, a marketing organization and agency management consultant, **five tips for clients thinking about conducting a pitch**:
 1. STOP. Have you gone through a thoughtful, data-driven appraisal of your agency’s performance?
 2. Think really hard if you need to go through the time, expense, and disruption of a pitch. It could be chaotic.
 3. If there really is no way to avoid a pitch, hire a search consultant. The good ones (there are a few) know how to conduct a fair, thoughtful process that will be simple and productive for both sides.
 4. Go back to point 1.
 5. Consider an AI-powered, self-service agency performance tool that will provide you with all of the data you need to figure out if you need to go to step 2.
- Independent agency **Atlantic New York** kicked off an agency-led “request for test,” where brands met with the agency as potential clients of record. Each brand was provided with a 30-minute slot to present its brief. The stunt campaign was designed to generate buzz at the Lions Cannes Festival.
- Per Ad Age, **10 noteworthy independent agency networks**:
 1. ACC (Acceleration Community of Companies) – 6 agencies (MKG, Stripe, Pixly, Trailblaze, Pink Sparrow, ACC Advisory) and 330 employees
 2. Amin Worldwide (advertising and marketing independent network) – 60 agencies (Bailey Lauerman, Cayenne, Cronin, Crowley Webb, CVR, Dalton Agency, Davis Elen, DCG One, di Paola Latina, Doe-Anderson, EGC Group, Fusion92, etc.) and 6,000 employees
 3. Culture Group – 5 agencies (Culture+ Group, Cien+, Cien+ Health, Human Dot Plus, TheChoice+) and 150 employees
 4. Dawn – 15 agencies (Active International, BarkleyOKRP, Bleacher Report, Bridgenext, Co:Collective, Crossmedia, Main Street One, Monday, NIL Influence, People First, Pixis, Redbox, Redpeg, Rethink, Zoo Media) and 3,200 employees
 5. IKPN (Independent Knowledge Partner Network) – 13 agencies (Evolve Agency Group, The Social Circle, Ken Media, Mediology Media, TDG Marketing, etc.) and 5 employees
 6. Meet the People – 9 agencies (VSA Partners, Public Label, Match Retail, Saltwater Collective, Swell Media, True Media US, True Media Canada, Coegi, RADAR Analytics) and 800 employees

7. Nostos Network – 50 agencies (829 Studios, Atomic Robot, BFO, Bullhorn, Butler, ButterCo, Confidant, Conscious Minds Studios, Collier.Simon, Craft & Commerce, Farmuse, Fors Marsh, Force Multiplier Strategy, Foundry, fred&ted, General Idea, Glide, etc.) and 2,000 employees
 8. Plus Company – 26 agencies (Cossette, Citizen, Mekanism, We Are Social, All Inclusive Marketing, Aperture 1, Camp Jefferson, Level 11, etc.) and 3,000 employees
 9. Serviceplan Group (6,000 employees)
 10. Worldwide Partners (88 agencies in 46 countries)
- If you're **hiring a search consultant**, Mercer Island Group suggests asking these 10 questions:
 1. How many searches has the search consultant successfully completed in the past five years? In the past three years?
 2. Does the consultant charge agencies to win a search or be engaged in a search, included in a database or highlighted in a newsletter?
 3. Are they present in tissue sessions and finalist presentations and provide counsel to the client?
 4. What is their point of view regarding successful partnerships, the importance of strategy, the importance of chemistry, category experience, effective creative, and modern function-specific capabilities?
 5. Will the consultant modify their process significantly to cater to client requests?
 6. Can the consultant provide six or more references from the past two years?
 7. What is the consultant's attitude toward working with procurement?
 8. How does the consultant approach negotiations, and what resources do they have to support the negotiation?
 9. What is the consultant's policy regarding confidentiality and the media during the review?
 10. What is the consultant's process, rough timeline, any guarantees, cost and specific category or function experience?
 - Per Ryan Michlitsch, **10 ways to keep clients long term**:

1. Stay connected with your team	7. Be strategic about how you frame your work
2. Rotate resources	8. Keep yourself entertained
3. Get out of your own way	9. Encourage play
4. Challenge your own expectations	10. The next step is to take those templates and... throw them away
5. Quality over quantity	
6. Be in tune with your client	
 - Per Ad Age, recent large brand **wins by small independent creative agencies**: Austin-based Preacher with GMC; New York-based Bandits & Friends with Liberty Mutual Insurance; New York-based nice&frank with Häagen-Dazs; Portland, Oregon-based Opinionated with Panda Express.

Employment in the advertising industry

- 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.
- Interpublic Group agency **FCB Chicago** cut 9% of its 800 staff after losing creative work from pharma giant Pfizer.



Artificial Intelligence (AI)

- The **4A's** released a white paper about what it refers to as major technology disruption—AI. The 4A's "Perspective on AI" can be summarized by the acronym PICA: Participate (get involved—now), Incubate/ Investigate (scrutinize tools, formalize staff training, and lay foundations for operationalization), Collaborate (augment human skills with generative AI and ensure holistic, cross-functional thinking), Accelerate (plan, operationalize, and scale). 4A's also released a "crash course" on AI called "Navigating the Nuances of Artificial Intelligence," which includes a wealth of resources.
- The **New York Times** filed a copyright infringement lawsuit against Microsoft and OpenAI, the creator of ChatGPT, claiming that OpenAI copied millions of its articles to train its language models that power ChatGPT and Microsoft Copilot without the Times's permission or any content agreement. Microsoft previously announced a Copilot Copyright commitment for customers using its products infused with AI.



- Per Ascend2, **the top challenges for using AI** are: Lack of expertise (45%), Ethical and privacy concerns (34%), Budget constraints (33%), Data quality and accessibility (33%), Measuring ROI and performance (28%), Resistance to change (27%), Integration issues (25%). **Main benefits** potentially to be gained from AI: Increased efficiency (57%), Improved targeting (46%), Automation of repetitive tasks (40%), Better insights from data (39%), Enhanced customer experience (32%), Competitive advantage (27%).
- The proposed **AI Foundation Model Transparency Act**, introduced in the US House in December 2023, would direct the Federal Trade Commission, alongside the National Institute of Standards and Technology and the White House Office of Science and Technology Policy, to create standards for transparency in training data for algorithms used in AI tools.
- Per Dentsu, 91% of CMOs believe AI is the future and not a fad. Per Gartner, 80% of top creative roles will have a bigger mandate around **generative AI** to realize “differentiated results” by 2026. 60% of CMOs plan to employ tools like content-authenticating technology and user-generated content to protect against AI-related pitfalls.
- Per **Ascend2**, 15% of marketers are putting AI to extensive use in their marketing, and 51% are putting it to some use. 17% are not yet using it but plan to, and 17% have no such plans. Only 25% of users claim they are very successful at using AI, and 50% say they are somewhat successful. 24% say they are unsuccessful. 48% are somewhat likely to increase their investment over the next 12 months, and 29% are very likely to do so.
- **Havas** expanded its partnership with Adobe, transforming the agency’s end-to-end content workflows and paving the way for a smarter and more responsible content supply chain, leveraging Adobe GenStudio. The collaboration will enable all Havas agencies to leverage Adobe generative AI, giving them direct access to Adobe Firefly and Adobe’s family of creative generative AI models and to more efficiently deliver content and personalized customer experiences that are designed to be safe for commercial use.
- **NBC Universal** launched a new AI-based solution, called One Platform Total Audience, which automates planning across its linear channels and streaming platforms via a single audience-based buy and buying across linear and streaming TV.

ARTICLE

Does AI really stand for

Assessment Instrument?

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Visit agencymania.com/rethinking-ai-in-a-partnership-world to check out our article “Rethinking ‘AI’ in a Partnership World: Advice for Advertisers and Agencies”: What if “AI” meant something more than artificial intelligence? Discover 6 surprising and effective ways this popular abbreviation can improve agency partnerships.



- Independent Paris-based agency network **Fred & Farid** launched a global production studio, [Ai]magination, a joint venture between Fred & Farid's Shanghai and Los Angeles offices to work on AI-driven marketing campaigns.
- **Pereira O'Dell** launched a platform built for simulating conversation with consumers, powered by OpenAI's GPT-4 model, called Insights Machine. The consumers are artificial personas to resemble a brand's target audience, effectively creating AI-generated focus groups.
- **Microsoft's Retail Media Creative Studio** launched a generative AI solution to produce banner ads from text inputs and product URLs in seconds, test them to collect performance data, and optimize them in real time.
- Per MessageGears and Ascend2, **AI-driven automation** will yield significant cost savings (32%) and contribute in crucial ways to their future marketing strategies (61%). AI is most helpful when determining which customers are most likely to make a purchase (53%) or when determining the channel most likely to convert customers (50%).
- 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.
- 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.
- **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 **CMO Council and Zeta Global Holdings Corp.**, 60% of marketing professionals said AI and generative AI are likely to provide the highest return among their investments this year.
- Per **Gartner**, 75% of CMOs said generative AI improves efficiency, cuts costs, or offers other benefits. 95% of the CMOs said AI technology would get a significant share of their 2024 budget. Only 5% indicated they were not treating AI as an investment priority this year.
- **LVMH** held its three-day LVMH Data AI Summit in Paris, bringing together students and practitioners to explore innovative AI applications. The firm, which partners with Stanford University’s Institute for Human-Centered Artificial Intelligence, states: “Recent generative AI breakthroughs show new opportunities for major innovation and efficiency (e.g., bespoke designs and personalized experiences) but also challenges and risks (e.g., authenticity, customer perception, person-to-person connection).”
- Per **Gartner**, CMOs see the most ROI from generative AI in the following: improved time efficiency, improved cost efficiency, identifying/testing/optimizing customer data, improved ad targeting, improved personalization, reduced reliability on external agencies, autonomous campaign creation and execution, improved accuracy of predictive analytics, enhanced in-house capabilities, brand reputation management, advanced marketing attribution methods, reduced spend on media, and headcount reductions.
- The **European Union** approved the AI Act, the world’s first major law for regulating artificial intelligence. The EU Commission will have the authority to fine companies up to 35M euros (\$38M), or 7% of their annual global revenues, for violations. The law applies a risk-based approach, based on perceived threats to society (e.g., autonomous vehicles, medical devices, financial services, and education).
- **Sony Music Group** (Columbia Records, RCA Records, Epic Records, etc.) sent formal letters to 700+ generative AI companies and streaming platforms prohibiting them from mining text, data (including audio recordings, musical compositions, lyrics, and cover artwork), and metadata without explicit licensing agreements. The move is intended to make sure songwriters’ and recording artists’ rights, including copyrights, are respected.
- Actor **Scarlett Johansson** accused OpenAI of copying her voice for one of the voice assistants in ChatGPT (called “Sky” voice assistant) despite denying the company permission to do so. OpenAI said it was pausing the use of “Sky” in ChatGPT for the time being.
- Nonprofit **Girls. Inc.’s** new empowerment ad was 75% AI generated, created pro bono in partnership with agency Secret Level and others (Cosmo Street, Quiet Man, etc.), despite limited resources and time. The campaign encourages girls to be “Strong, Smart, and Bold” through direct service and advocacy.
- **Dove Chocolate** launched the “Mom Experience Translator” for Mother’s Day—an AI-powered tool (via OpenAI’s GPT-designed to help moms reenter the workforce by bridging the gap between experiences gained during motherhood and skills sought by recruiters and hiring managers).
- **eBay** announced that the brand is using AI to multiply the amount of creative work it produces. It also uses science models to predict which creative will perform the best for each customer to create the most personalized experience possible. The brand works with the agency Joan for its creative and EssenceMediacom for its media.
- Publicis Groupe-owned **Digitas** launched its own generative AI operating system and tool suite (Digitas AI) to help clients deliver marketing outcomes and assist in AI-powered brand experiences directed at consumers. AI agents are built with identity data and are used to represent key demographics to pressure-test ideas and messaging.



- Microsoft-owned **LinkedIn** partnered with the Coalition for Content Provenance and Authenticity to label AI-generated content in users' feeds, alerting users with a small icon.
- **Meta Platforms**, the parent company of Facebook and Instagram, expanded its suite of generative AI tools for use by its advertisers, including tools to create images and text.
- **TikTok** launched AI-powered ad automation tools TikTok One and Symphony, built on its NewFronts platform. Advertisers can access creators, creative tools, agency partners, and measurement all in one place, as well as TikTok Shop ads to optimize bidding, budgeting, ads management, creative, and merchant costs like affiliate payouts, ad spend, and platform fees.
- **Microsoft** launched CoPlanner, a new AI-powered media planning tool aimed at simplifying the process for advertisers and agencies by leveraging Microsoft's generative AI technology (advanced language models such as OpenAI's GPT) to turn text prompts into media planning specs and recommendations (data that contains relevant information such as dates, pricing, and targeting criteria).
- **WPP** partnered with OpenAI competitor Anthropic, enabling its Claude 3 models (Haiku, Sonnet, and Opus) to be used across the marketing process by 100,000+ employees. Anthropic ties to Amazon (which invested \$4B+ in the company). WPP still partners with OpenAI's GPT-4 and Google's Gemini on its WPP's AI brand platform, Open.
- **Coca-Cola** made a \$1.1 billion investment in Microsoft's cloud and generative AI technologies (including Microsoft Azure OpenAI Service) to develop generative AI solutions for various business functions and Copilot for Microsoft 365 in a move to foster its digital transformation and fuel innovation and productivity globally across marketing, manufacturing, and supply chain.
- Beauty company **The Estée Lauder Companies** launched its AI Innovation Lab in partnership with Microsoft to expedite R&D, consumer, and social listening. The brand created an internal generative AI-enabled chatbot that uses conversational technology, and plans to use AI tools to access faster data insights, increase speed to market and personalization, and create stronger local relevancy.
- Swedish-based buy now, pay later firm **Klarna** reported that it cut sales and marketing spending as a result of AI tools, saving \$10M annually and reducing its external agency expenses by 25%. The brand is using AI instead of outside agencies for translation, production, CRM, and social. The firm's new AI-powered tool, Copy Assistant, is handling 80% of its copywriting.
- **ISBA** launched new Generative AI Guidance and agency Contract Terms, which advertisers can consider as a supplemental agreement to the ISBA Media Services Framework (MSF2021). The contract terms aim to encourage collaboration between advertisers and media agencies on the responsible use of generative AI.
- **Meta** launched its AI Studio platform, which enables creators on Instagram to build AI versions of themselves that can interact with fans via DM. Meta's custom AI bots explain that the user is interacting with an AI bot.
- Per TikTok, since fall 2023, 37 million **TikTok creators** have shared posts that include some form of generative AI. 97% reported using some form of AI in their content. However, 63% are concerned AI "might decrease their value as a creator," while 50% said they were afraid social media platforms would "replace human content creators with AI-generated content."
- Moroccan lifestyle influencer Kenza Layli won the Fanvue-based **Miss AI contest**, out of 1,500 AI programmers worldwide. Layli used AI-generated images, captions, and acceptance speeches to promote diversity.



AI should be viewed as an enabler and amplifier of human creativity, not as a replacement for it."

Naomi Troni
Global CMO, **VML**



- **Agency Mania Solutions (AMS)** announced the launch of its AI Sentiment Analysis feature as part of its EvaluationDeliver solution to help clients understand the effective and ineffective elements of their client-agency relationships from large datasets. The result is clearer and more actionable insights to improve relationships.
- Global beauty brand **L'Oréal** assembled a generative AI task force to define the technology's potential, assess its impact for the company and develop best practices for upskilling its workforce. One topic is guardrails to make sure the technology is not used to alter the physical features of models and other individuals who appear in its marketing messages. The firm recently launched an application called Beauty Genius, a "personal AI beauty assistant."
- Per Ad Age, **top 5 AI advancements in 2024:**
 1. The rise of text-to-video
 2. AI in consumer tech
 3. AI startup race shakes up
 4. The emergence of AI-powered avatars
 5. Agency giants invest big in AI



- Per **eMarketer**, despite moderation in adoption, generative AI technology is expected to reach 100 million US users in 2024, or 29.3% of the population (Facebook took four years to reach the 100 million-user milestone). By 2026, 40.6% of US internet users are forecast to be gen AI users.
- **WPP Open**, WPP's intelligent marketing operating system powered by AI, is a highly personalized operating system that integrates all of WPP's service offerings, technology, applications, and data in one place. Tailored to reflect a company's ways of working, Google, IBM, L'Oréal, LVMH, Nestlé, and The Coca-Cola Company are using WPP Open to support their marketing operations: augmented ideation and creation, governed (brand guidelines, regulatory norms, DE&I policies, and accessibility requirements) and optimized assets (with a 90% reduction in review\approval time), content at scale (using the AI-first Production Studio), and optimized media (34,000 AI-powered strategies and 50,000 AI-modeled scenarios, 2.3 trillion AI-evaluated impressions).
- French startup **AdCreative.ai** launched a new language model, named AdLLM Spark and operating with Nvidia, built exclusively for advertising to produce ad text with high conversion rates on every major advertising platform (Facebook, Instagram, Google, YouTube, LinkedIn, Microsoft, Pinterest, TikTok). The model leverages a dataset of 840 million lines of instructions, ad texts, and target audiences, and is based on instant text generation and performance prediction (such as CTRs) with a reported 90%+ accuracy, higher than any other model, including ChatGPT.
- Per **Forrester and the 4A's**, 91% of US ad agencies are currently using (61%) or exploring generative AI (30%). 29% see it as a major disruption that will change their business forever. More than 50% of agencies expect generative AI to have a significant or very significant impact on key aspects of their agency's ecosystem. AI will have a significant or very significant impact on how an agency creates content (76%), the agency marketplace (71%), how consumers interact with the work created by an agency (69%), and what content an agency produces for clients (62%). 74% use AI for aiding creative ideation/brainstorming. 49% use it for generating assets and dynamic creative optimization.
- Per **Accenture** and its "Generative AI for customer growth" research, 90% of CMOs expect generative AI to revolutionize their industry and how they interact with customers, but 72% are unsure how to realize their ambition or where to start, and 76% are "waiting and watching" amid worries about reputation, data privacy, model exposure, and unconscious bias. Companies that apply generative AI to customer-related initiatives can expect to achieve 25% higher revenue after five years than companies focused only on productivity. The study refers to an 80% reduction in data processing time that supports a 40% improvement in speed to market with new products/services as well as 94% savings in production time.
- Per New Street Research, **Google's "AI Overview"** advertising is forecast to generate \$17 billion by 2027. AI Overview ads are expected to generate \$1.7 billion for Google in 2025 (less than 1% of Google's total ad revenue) and to rise to \$6.7 billion in 2026 (2.8% of Google's total) and \$16.9 billion in 2027 (6.5% of Google's total). Per WPP's GroupM, more than two-thirds of advertising buys are now "AI-enabled."
- **WhatsApp** introduced AI tools on the Meta-owned messaging and Voice over Internet Protocol (VoIP) app to enable businesses to use AI to answer questions commonly asked by shoppers, to create ads to run on the Meta-owned platforms Instagram and Facebook, and to follow up with customers to remind them that they left an item in their cart or to offer them a discount on a purchase they have been considering.
- **Spotify** launched Quick Audio, which enables brands and agencies to create scripts and voiceovers using generative AI. The solution is available in Spotify's Ads Managers.
- In close partnership with OpenAI, **Klarna** built an AI-powered copywriting tool, Copy Assistant, which allows the company to use AI for 80% of all copywriting.



Winning back is not as easy as winning over. Reconsideration relies on a client being truly restless around (self) reflection and improvement."

Melanie Norris
Managing Director and Head of Planning,
BBDO Worldwide





- Generative AI platform **Pencil** and creative data platform **CreativeX** joined forces to enable automated creative scoring of gen AI ads at scale, enabling brands to automatically see how content created by Pencil scores against its creative best practices and guidelines. 20,000+ marketers across 3,000+ brands are using CreativeX's AI technology to analyze content against best practices and brand guidelines.
- Per the 4A's, **language models from OpenAI and Google** are becoming "multimodal" (the ability to handle multimedia inputs such as text, voice, and imagery and deliver similar multimedia outputs) and "agentic" (capable of complex multistep processes to complete a desired task). Implications for agencies:
 1. Rapid content creation
 2. Advanced search
 3. Multimodal input and output
 4. A focus on collaboration
- **Luma AI**, a San Francisco AI startup, announced the launch of Dream Machine, an AI system capable of generating high-quality, realistic, fluid, cinematic videos from simple text descriptions or images in about two minutes.
- **Publicis Groupe** launched its BSbot detector ("Know what's AI and what's BS") at the Cannes Lions International Festival of Creativity, an app available exclusively to Publicis clients and produced by Le Truc. Clients can record audio or upload images and text from speeches, meetings, presentations, articles, and press releases about AI, and then BSbot translates AI hype and jargon to "real talk," debunking myths and highlighting questions that should be asked. Outside of this catchy PR stunt, Publicis announced its AI-powered CoreAI, in which it is investing 300 million euros over the next three years.
- **Pinterest** launched an AI-powered advertising technology program called Pinterest Ad Labs to allow brands to generate backgrounds for products that are based on users' shopping preferences. The aim is to improve user experience and campaign results.
- Horizon Media's commerce affiliate, **Night Market**, expanded its Neon AI platform into a software-as-a-service (SaaS) format beyond Horizon clients. The solution is aimed at standardizing measurement and reporting across retail networks, connecting to any retail media network and leveraging marketing-mix modeling techniques.
- WPP's media investment arm **Group M** estimates that 70% of ad buys in 2024 will be AI enabled and will exceed 90% by 2029. By that year, estimates are that machine-generated content, including print, social, audio, TV, and film, will account for nearly 11% of ad content, up from an expected 1.6% this year.
- WPP and IBM launched a new **AI-based B2B** solution that is integrated into WPP Open and powered by IBM's AI and data platform watsonx. It's a so-called AI-powered "Buying Group Brain" designed for B2B marketers. The WPP AI model, trained on data from clients and third parties through watsonx, can more accurately identify target buying groups in a B2B client account.
- Vivendi-owned French conglomerate **Havas** announced that it will invest 400 million euros into AI and a new operating system called Converged over the next four years. The firm has already invested more than 600 million euros into tech and data in the last decade. Converged will integrate Havas creative, data, media, and tech capabilities.
- Per **Havas's 2024 report "GEN AI: What Kind of World Will We Live In?"**, 97% of "prosumers" (aka leading influencers and market drivers) consider generative AI as a revolutionary technology (compared with 3% considering it a passing fad). 94% have heard of generative AI tools like ChatGPT, Midjourney, Dall-E, etc., and 84% have used them. 59% don't care if AI created a piece of art (music, film, painting, writing) as long as they find it beautiful and moving. 45% are certain generative AI will be able to replace human creativity.
- **Amazon Ads** launched AI-driven features, called Aspect Ratio, as part of an AI-powered Image Generator to dynamically design and resize creative via adjusting the logo, copy, and call-to-action and translating into multiple languages to build ad placements across Sponsored Display, Posts, and Stores. Aspect Ratio aims to improve ad quality, test multiple options, optimize ad investment, and increase conversions.
- **Reckitt** (owner of brands such as Air Wick, Clearasil, Enfamil, Finish, Gaviscon, Lysol, Mucinex, Woolite, etc.) invested in four-month generative AI pilot programs led by the company's IT and digital team, in partnership with Boston Consulting Group. The pilots are producing advertising content by adapting assets and optimizing for launch across multiple countries and languages. Reckitt is reporting positive results.
- **WPP** launched its new AI-enabled, end-to-end production studio developed with Nvidia Omniverse in a move to streamline and automate, and thus speed up, the creation of text, images, and video at scale. Embedded within WPP Open, the Production Studio will provide access to the company's generative AI content engine.
- Global professional services firm **KPMG** launched a companywide employee enablement and upskilling initiative called AiQ, designed to infuse AI in every aspect of its business and to augment its human IQ (talent, expertise, and experience).
- AI-powered global payments network and shopping assistant **Klarna** cut its sales and marketing spend by 11% in Q1 2024 while increasing the number of campaigns and updating collateral frequently. AI is responsible for 37% of the cost savings, or about \$10M annually, Klarna reports. Key drivers:
 1. Cost reduction in external agency expenses (25% reduction including translation, production, CRM, and social agencies, with run-rate savings of \$4 million)
 2. Savings on image production (achieved a \$6 million reduction in image production costs, using gen AI tools like Midjourney, DALL-E, and Firefly for image generation—and Topaz Gigapixel and Photoroom for final adjustments, saving \$1.5 million in Q1)
 3. Increased efficiency and creativity (generated 1,000+ images in Q1 using gen AI, reducing the image development cycle from six weeks to seven days)



- The **4A's** launched “GenAI Blueprint,” a comprehensive guide to help agencies explore generative AI and help those already integrating it into their workflow. The guide provides insights and practical strategies to equip agencies with knowledge and tools. It also issued “The State of Generative AI Inside US Agencies 2024” and a thought-leadership paper titled “Preserving Agency Value in the Era of GenAI Transformation,” offering an 11-point approach for framing the use of generative AI to help all stakeholders appreciate the value it adds to agency services while emphasizing that human expertise remains at the core of great work. Other recent, member-only 4A's resources include “Accelerating the Pace of Change: AI Announcements from OpenAI and Google,” “Colorado Becomes First State to Adopt Comprehensive AI Law,” “Emerging Laws Governing Agencies’ Use of AI,” “2024 AI Index Report Summary” (by Stanford University), “Unveiling the Future: How Agencies Are Implementing GenAI,” and “Using Generative AI Safely and Responsibly.”
- IT company **Infosys** used AI to promote its partnership with Rafael Nadal at the 2024 Australian Open, despite an injury that forced the tennis superstar to drop out of the tournament. The firm launched #RafaForever, an activation allowing tennis fans to generate custom images (using Stable Diffusion) of Nadal and share them across social media. Three weeks after launch, fans generated 18,000 images, resulting in more than 100 million impressions.
- Interpublic Group-owned production company **Studio Rx**, a subsidiary of IPG Health, produced 20 pieces of content for its website in 10 days using Adobe’s Firefly platform (using two people for two weeks compared with three people for two months), determining the process was five times more time efficient than without AI.
- **Forum3**, a firm building and partnering with creators, brands, and projects that leverage the unique innovations and creativity unlocked by web3, launched AI ad tech product Spok, which is trained to emulate most of the steps commonly taken by a full marketing team—before the creative is designed. Spok incorporates proprietary information and analyzes a website to determine objectives, audiences, core products, and possible competitors, then conducts research to develop a marketing plan containing an array of content strategies and channels on which to implement them.
- Seattle-based AI solution provider **Gradial** further expanded the number of solutions it integrates with. The firm allows brands and agencies to unlock their content supply chain by automating workflow across Adobe DAM, Workfront, Smartsheet, and other platforms, creating webpages that migrate between design systems or CMS such as WordPress or Adobe Experience Manager, writing web content updates (pictures, copy, links, banners, etc.) and conducting QA without leaving their CMS or workflow, or handling content creation such as personalized assets, resizing images, and producing variants that can be uploaded to their DAM and across channels.
- Per **Stagwell**, in the first two quarters of this year, Microsoft capital expenditures reached \$33 billion, driven by AI investments. Meta raised predictions for its 2024 spending bill twice, to up to \$40 billion—it spent \$8.5 billion in the second quarter on AI computing infrastructure alone. At the time of the report, Google said it planned to spend at least \$12 billion on AI per quarter for the remainder of the year.
- **Oliver** launched a new generative AI tool, Slipstream, to enable clients to build more effective, complete creative briefs and elicit better results from their agency partner. Built with Weaviate, Slipstream is to reduce the end-to-end effort expended from brief through client acceptance by 50%.
- Per the **4A's**, more than 80% of agencies use generative AI for up to half of their work.
- Per McKinsey, top **gen AI risks** are strategy; impaired fairness; intellectual property infringement; data privacy and quality; malicious use; security threats; performance; and “explainability.”
- The 4A's published its **State of Generative AI Inside US Agencies 2024**. The members-only report shows how agencies integrate AI into their offerings, focusing on enhancing productivity alongside content, media, SEO, and internal use cases while navigating the legal, commercial, and emotional barriers.
- Per Ad Age, **new AI tools** being leveraged by agencies: ElevenLabs (to create and alter synthetic voices), Ideogram (image-generation technology), Polycam (to create lifelike, natural-looking 3D scenes and subjects), Runway (focusing on image and video), Suno (an AI music generator, to “inspire” new ideas), Superhuman (for email management), ThoughtSpot (for big data analytics in real time), Topaz Labs (photo and video enhancement software), Waldo (for pitches, brand strategy, creative).
- Omnicom Group’s **DDB Worldwide** launched several bespoke tools. One is a chatbot tool called LesGPT to help marketers “shape briefs into usable campaign inspiration.” Another is Bad Ideas Bot to source a multitude of ideas for the purpose of creative inspiration and new campaigns. DDB states that 10% of its workforce of 6,000 people are now weekly active users of these tools.
- A report by JFE International Consultants, “**How AI Will Disrupt Agency Compensation Models**,” looks into how agencies are using AI, what investment they are making and in what forms, and how they plan to monetize their investment.
- Per the **2024 State of Marketing AI Report**, 67% say a lack of education and training is a top barrier to AI adoption in marketing, followed by lack of awareness and understanding (56%), lack of strategy (43%), and lack of talent with the right sets (40%). Other barriers: lack of resources, fear of mistrust of AI, lack of ownership and governance, lack of executive support or vision, and lack of technology infrastructure.



- Per the **World Federation of Advertisers (WFA)**, 80% of brands worry how agencies use generative AI on their behalf. Over 50% believe that legal, ethical, and reputational risks present major roadblocks to more widespread adoption throughout the industry. Yet only 9% of brands say they have no current plans to use the technology for their marketing. 12% consider their organizations' use of generative AI as "mature" with a unified strategy that applies across all business units. 63% say they have adopted "responsible" AI principles (privacy, transparency, responsibility, intellectual property), while 21% are developing them.
- **Snapchat** launched an AI-generated video tool for creators, allowing them to make engaging videos from a simple text or, soon, an image prompt. AI-generated videos shared on Snapchat will be labeled with a Snap AI watermark.
- **Amazon** launched its Amazon Video Generator for advertisers, an AI-powered tool (built on Image Generator) that allows brands to turn one product image into a video clip a few seconds in length after just a few minutes of processing.
- Per agency Compile, Detroit-based advertising agency **D/CAL** uses AI in three ways:
 1. Strategic warm-ups (e.g., asking the right questions)
 2. Creative development ("saving 25% of creative development time otherwise [spent] cobbling together conceptual visualizations in Photoshop")
 3. Video validation (using Maiven to test video before client delivery using facial recognition)
- Per the **WFA**, 63% of brand advertisers are using generative AI in their marketing strategies, but 80% express concerns about how creative and media agency partners are using the technology on their behalf. And legal (66%), ethical (51%), and reputational (49%) risks are major roadblocks to more widespread adoption. 26% say they are "aware" (they use gen AI in a sporadic, occasional way), and 58% say they are at a "developing" stage (despite having a dedicated gen AI strategy, it does not apply across all business units/teams).
- **Adobe** launched its first AI video-creation tool, an enhancement to Adobe Firefly, using just text prompts and generating 5-to-10-second videos on apps, including Instagram, TikTok, and Snap. The tool works with Adobe's GenStudio, which streamlines the ability to develop campaigns and launch them to Facebook, Instagram, TikTok, and Snap, and display ads online through Google and Microsoft's ad platforms.
- Team One, a Publicis Groupe-owned ad agency, launched **Faikcheck**, a web tool for quickly detecting whether content, including images, is real or a product of AI. The tool scans details and outputs the verdict, with a summary of conclusions and a confidence score up to 100%.

- Software firm Lightricks launched **SafeCollab**, an AI-powered influencer vetting module within its Popular Pays creator collaboration platform. SafeCollab automates the vetting process, reducing the time it takes for brands and creators to assess whether a potential partnership would align with their values.
- Per Hype Auditor, 83% of **Instagram influencers** use AI tools for content creation. 76% of content creators use AI tools primarily for content creation (images, videos, captions). Top 3 primary concerns about generative AI: quality of content (31%), ethical considerations (22%), copyright issues (20%).



Authenticity remains a unique differentiator: staying true to each agency's identity aligns well with diverse client aspirations."

Philippe Paget
Editor in Chief, **Adforum**



- Per Ad Age, **top AI tools** used by agencies: Adobe Photoshop's Generative Fill (generative AI), Cassidy (pitches), ComfyUI (generative AI), Creatopy (ad creation), Flim (database of video cuts/stills), Focaldata (research and analysis), Kive (organize, share images, and videos), Krea's Realtime (video generation), Pika Labs (video generation).
- An unauthorized 50-second Dior spot, "**The Ascendance**," featured AI-generated versions of Rihanna and Emilia Clarke, with the intention to showcase the possibilities of generative AI to produce quality work. The mock was developed as a sort of controversial stunt/proof of concept by Serbia-based Davinci Production to promote Dior Prestige La Crème but did so without the luxury brand's approval.



In-house agencies

- **2023 In-House Agency of the Year** was Tonic by Highmark Health, per the In-House Agency Forum. Tonic handles production, broadcast, print, social, mobile, and media, and expanded its production capability to include videographers, motion designers, and digital designers. Finalists included Norwegian Cruise Line and its in-house Rebel Fish Creative Group and PepsiCo and its in-house Content Studio.
- **Kimberly-Clark** continued its ad-tech in-housing efforts in a phased approach, starting with ad verification, demand-side platforms, paid search, and ad server and dynamic content optimization.
- 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.
- Per creative staffing agency Cella, 20% of **in-house agencies in 2023** consisted of 6 to 10 people; 18%, 11 to 20; 14%, 21 to 30; and 13%, 31 to 50. Top services expected to grow are video production (41%), video shooting and editing (39%), digital design (32%), motion graphics (32%), and creative strategy (29%).
- What are the best in-house agency teams of the year? In-House Agency Forum’s **2024 In-House Agency of the Year Award** will be announced at the IHAF conference in November. The winner will be chosen from three finalists. The IHAF recognizes exceptional performance in Business Impact, Client Partnership, Creative Expertise, Operational Effectiveness, and Talent & Teamwork. The 2023 In-House Agency of the Year was Tonic by Highmark Health. The other finalists were Norwegian Cruise Line’s Rebel Fish Creative Group and PepsiCo’s Content Studio.
- Per the ANA, 82% of brands had an **in-house agency** in 2023, compared with 78% in 2018. Per a 2024 survey from Canva and MMA Global, 30% of brands moved more creative work in-house in the previous 12 months and 31% planned to move work in-house in the next year. 83% claimed that in-house is better than outsourcing from a cost perspective, and 61% said outsourcing was better for creative quality. 50% handle creative strategy in-house, and 25% outsource that part of the business.
- Per the ANA, five priorities for **Lenovo’s in-house media agency** (Media Center of Excellence):
 1. Full control to improve its speed to market
 2. Improved performance with a goal of optimization
 3. Increased transparency across the media and data value chain
 4. Direct partnerships to build strategic local and global relationships
 5. Future-proofing of the brand
- Per integrated communication firm PR73, 50% of **in-house comms teams** are apparently distrusted by internal stakeholders and at odds with other department priorities. 85% of in-house communication pros claim that they experience a lack of trust while guiding or executing communication strategies, and 88% think they’ll be cut if the company performs poorly financially. 89% say that using the right external firm may make them appear more competent and improve trust with internal stakeholders.

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Key topics include the performance of major holding companies, AI-driven innovation, compensation models, and practices that foster impactful client-agency collaboration!

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THE B2B SALES CLUB

**A DEEP DIVE INTO THE
EVOLVING LANDSCAPE
OF MARKETING
AGENCIES WITH
BRUNO GRALPOIS**



- Brands are increasingly **mixing external and internal (in-house) talent**. DoorDash works with agencies Gut, The Martin Agency, and Wieden+Kennedy in partnership with its internal shop, Superette. PepsiCo also relies on external agencies and its internal shop, Sips and Bites. Liberty Mutual Insurance recently added Bandits & Friends to its roster, collaborating with its in-house agency, Copper Giants.
- Eli Lilly’s in-house agency, **Lilly Marketing Studios**, sourced in-house talent globally, handling its Lilly Capability Center India as an extension of the US office in a move to be agile at all hours, handling brands, content origination and support, production, consumer tactics, and creative services such as retail, B2B, sports, and life sciences. Per the brand, from brief to the first working session, the studio takes 8 days compared with 19 from an outside agency; from the brief to the tactic ready for review, the studio takes 19 days compared with 37 from an external agency. Other benefits cited include capacity, surge handling, speed, reduced costs, and improved quality.
- Minneapolis-based company **Citizen Inside** launched to help clients modernize their in-house agency or create one by custom designing, creating, and operating them for clients. The focus is on organizational structure, talent, workflow streams, and tech stack. Citizens Inside is part of the Dawn network, a portfolio of independent, specialist marketing services agencies with centralized services.
- Tips on how to build **a strong creative culture** in an in-house agency, per Carey Cockrum, senior director of managed services at Cella by Randstad Digital:
 1. Identify values that support the organization
 2. Hire and retain the right people
 3. Give credit where credit is due
 4. Create permission to push boundaries
 5. Manage burnout
 6. Bring the outside in
 7. Have fun
- **Delta Air Lines’ in-house agency**, Window Seat Brand Creative, grew from a 15-person creative services team into an 85-person full-service agency. In 2023 the agency executed more than 2,000 creative projects and produced 6,000 creative assets, with the goal to grow output by 45% by the end of 2024.
- Per Andrea B. Ruskin of **Blum Consulting Partners**, key components to build a successful in-house agency:
 1. Empower leaders to define clear goals
 2. Once those goals are established, get buy-in
 3. Align the creative team with the company’s overall strategy

New agencies, capabilities, and reorganizations

- **BMW of North America** consolidated its creative, digital, CRM, and social media activities for BMW, Mini, and BMW Group Financial Services under one roof at Omnicom Group. The move effectively creates a multidisciplinary, cross-functional team to support all aspects of BMW of North America marketing in an effort to create synergies, streamline, and increase speed. Omnicom has experience in that area: It did something similar by forming a dedicated agency unit for Mercedes-Benz in 2021 called Team X.
- Ad Age highlighted **several agencies that launched** in 2023: creative agency **Bandits & Friends**, Latino agency **Creyentes**, cultural agency **Culture+Group**, diversity-owned agency **Ink-Mgmt**, and advertising collective agency **MurderHornet**.
- **WPP** launched a new unique index, designed by BAV®, demonstrating that brands that invest in creative capital can provide more than 2x the average shareholder return.
- **IPG** launched a flagship innovation hub, called “The IPG Innovation Dock,” in Brooklyn Navy Yard’s Dock 72, a new office building specifically constructed for companies that thrive on innovation, creativity, and design. The IPG Innovation Dock is initially anchored by agencies Huge and R/GA, and teams have a range of complementary specialist capabilities in areas such as commerce, experiential, consulting, and design.
- New creative agency **ReadyMade Company** 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** 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.
- **R/GA** merged its US and LATAM operations as part of a restructure to drive more collaboration across its offices, a model it calls “distributed creativity.” The move will allow the firm to better leverage specialized talent in LATAM, particularly in product and experience and communication design.
- **Omnicom** expanded its investments and operations in India, opening new campuses and Global Solutions Centers (Bengaluru, Chennai, Gurugram, Hyderabad), which will house 5,500+ employees, including specialists in media, creative, data and analytics, digital commerce, marketing technology, and artificial intelligence. The group launched Omnicom Advertising Services group in India.
- **IPG Health** announced a restructuring that includes folding McCann Health New York into sibling health agency Area Additionally, Hill Holliday Health and McCann Health New Jersey merged to form a new entity called Rise & Run, bringing together Hill Holliday Health’s consumer roots and creative capabilities with McCann Health New Jersey’s science and health industry expertise.
- **Atomic London** launched a creative agency, Atomic Matter, to help health brands craft campaigns while leveraging the agency core capabilities such as social and creator-led content, media, performance, and data strategy.
- **We Are Social US** launched Hello in the US, a separate boutique agency with the agility of a startup. Hello is a sister agency to We Are Social and will operate separately, specializing in cultural-driven campaigns and tailored social to fast-growing industries and challenger brands.
- Stagwell-owned agency **Doner**, based in Detroit, launched its first inclusive marketing practice. The practice aims to develop tools and frameworks to ensure a range of diverse voices are well represented in clients’ creative.
- Global marketing company **Quad** launched a new agency, Betty, which will provide services such as creative, strategy, design, and content studios. All accounts previously handled by creative shop Periscope will be under the new agency. Quad’s brand design agency, Favorite Child, will operate under Betty as well.



- Creative consultancy **Dang** launched to help marketers target Gen Z and Gen Alpha consumers, specializing in creative transformation via building relevance and modernization by embracing Next-Gen Centricity™ methodology across brand experiences. Karan Dang, former Walmart and Disney creative leader, started the agency.
- B2B marketing agency **BBN** added two new Asia-Pacific agencies—Brew Interactive, a digital marketing agency headquartered in Singapore, and Custom Media, a full-service B2B agency in Tokyo—in a move to strengthen its presence in the region. BBN now has 60 offices in 29 countries.
- Atlanta-based **We Are Rosie** launched Run by Rosie, a new marketing and creative agency based on the firm's flexible talent model. Leveraging 30,000+ marketing pros, the firm assembles hyper-specialized teams to address brand strategy and marketing transformation. Services include full campaigns, site and app development, photo shoots, content development, copywriting, creative marketing, paid search, marketing strategy, and research.
- **General Motors** changed its global marketing and agency model to include a mix of current and new agencies. The brand will no longer operate with an AOR structure and is pursuing a modern approach to real-time, efficient content development.
- Ad Age launched its **agency account review tracker**, which enables the following of notable accounts in review, including for creative and media, and the consultants (if any) and incumbent agencies involved. As of July, existing reviews called out were Adobe, Amazon, BlackRock, Columbia Sportswear, Corona Extra, Culligan, eBay, General Mills, Goldfish, Goodyear Tire and Rubber Co., Häagen-Dazs, Kellanova, Northwestern Mutual, Panda Express, Rocket Cos., Unilever, and WeWork.
- **Interpublic Group's Acxiomis** focused on turning its “integrated marketing engine” into a single operating system connecting data, media, creative, production, and commerce, so brands can deliver personalized, engaging customer experiences using their preferred clouds and technology partners.

ARTICLE

Breaking Silos: The Key to Effective Cross-Agency Teamwork



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- **Horizon Media's** commerce affiliate expanded its Neon AI platform into a software-as-a-service (SAAS) format in a move to standardize measurement and reporting across retail networks.
- San-Francisco-based full-service, tech-enabled platform **Linqia** launched OTS (On the Street) to connect brands, partnering with 50 creators to help brands tap into the popular video category of “on the street” interviews. Per the firm, 500,000 Instagram Reels are labeled with the #OnTheStreet hashtag and the hashtags #OnTheStreet and #StreetInterview are attached to more than 250,000 TikTok videos.
- Omnicom consolidated several production units spread across the holding company into a newly formed unit called **Omnicom Production** in a bid to ramp up its production capabilities under one roof and connect it to the firm’s data technology suite. The new practice area includes Omnicom Studios, eg+, Designory, Mother Tongue, Link9, and the production departments housed within the firm’s creative agencies, such as BBDO and DDB. It will leverage Adobe’s Content Supply Chain solution, Artbot, its intelligent content automation system, and Omni, its open operating system.



The value equation needs to be aligned with the goal of the relationship.”

Greg Wright
Senior VP, Brand and Media, ANA



- **Havas** set in motion a new strategic plan, dubbed “Converged,” built on a “client-centric approach” that it claims will provide “hyper-personalized solutions: a new, more seamless, interoperable, holding company-wide operating system built around a commitment to spend \$430 million on data, technology (including AI) over the next 4 years.”
 - **Havas** launched a consultancy dedicated to GLP-1 innovation to drive meaningful strategic solutions in response to disruptive innovations, such as GLP-1s (a class of drugs first used to treat diabetes that is now being adopted for weight loss). As a full-service creative agency with the largest health communication network in the world, Havas provides bespoke recommendations that assist brands in leveraging GLP-1 advancements.
 - Stagwell’s European e-commerce agency **Brand New Galaxy** folded into flagship media agency **Assembly** as part of consolidation and to further integrate attitudinal, behavioral, and transactional data under Assembly’s AI-powered platform and operating system.
 - The **Code and Theory Network**, Stagwell’s digital transformation network, expanded to include Instrument and Left Field Labs in a move to strategically align Stagwell’s individual digital transformation agencies under the Code and Theory Network (other agencies in the network include Kettle, Truelogic, Rhythm, and Mediacurrent).
 - Stagwell’s **72andSunny** launched The Strategy Studio, a new feature that encompasses all 72andSunny’s global locations (Sydney, New York, Los Angeles, and Amsterdam) to help identify growth audiences, develop foundational brand strategies, and create go-to-market playbooks.
 - **Dents** expanded its Business Transformation (BX) practice globally—US, UK, Ireland, Germany, Austria, Switzerland, Denmark, Norway, Sweden, and the Netherlands—to help clients ignite stalled transformation initiatives, create new revenue streams, revamp strategy, and develop sustainability programs.
 - Global creative studio **Stink Studios** launched a creative collective, called Not for Hire, to foster greater talent diversity (outside of advertising) and bring together artists, photographers, fashion designers, gallerists, musicians, comedy writers, and sculptors to help brands create, develop, and execute creative.
 - **S4 Capital** conducted a major overhaul and restructuring of its flagship brand, Media.Monks, including a name change to Monks, designed to simplify operations. There will be a transition to two main practices—Marketing Services (creative, content, media, social, and data-driven marketing solution) and Technology Services (technology, user experience, product engineering, data, digital transformation, and consulting services). Both are powered by the agency’s AI-driven workflow platform, Monks.Flow. The move also more accurately represents the firm’s integrated global team, unified expertise, and diverse communities.
- **Omnicom** launched a new Middle East operation called Omnicom Qatar in a move to build a stronger presence in the region. Omnicom’s local agencies include Auditoire, OMD, and PR unit OPRG.
 - Omnicom Group’s **Goodby Silverstein & Partners** launched a design unit called Silverstein Goodby & Partners, which includes designers, animators, motion designers, and strategists. The agency works with brands such as Autodesk, Comcast Business, Frito-Lay, and others.
 - In a major shakeup at **Omnicom creative agencies in Canada**, BBDO Canada, DDB, and TBWA merged to form Omnicom Advertising Group, but entities will still operate under their original name. Omnicom has been sharing resources and assets as it looks to drive efficiencies and find ways to streamline and simplify client access to its network.



- Interpublic Group's MullenLowe launched its **MullenLowe Design Studio**, combining its design practice across its offices in Boston, New York, and Los Angeles under a dedicated group. The move puts design at the core by assembling a diverse team of graphic designers, motion designers, film editors, illustrators, and typographers.
- After several acquisitions in recent years (BlueKai, Moat, Datalogix), software giant **Oracle** decided to shut down its declining advertising business to focus on cloud, subscription services, and AI solutions.
- **Spotify** launched its first in-house creative agency, Creative Lab, to help brands create custom marketing campaigns and test generative AI ads. The move aims to attract advertisers to the platform, which has 615 million listeners. The agency creates video and audio ads, in-app digital experiences, and other interactive ad formats, like call-to-action cards.
- **Civic Entertainment Group** launched an Accessibility Consulting Practice within the agency to help brands better speak to the needs of the disabled community with services that include creative, social media, and publicity. Per the Centers for Disease Control and Prevention and World Health Organization, 1.3 billion people worldwide (16%) identify as disabled.
- **Creative Artists Agency (CAA)** launched a new Media & Entertainment Partnerships division for forging partnerships between brands and their intellectual property, media companies, and star talent. The division will help clients develop, finance, and launch films, TV, social, and digital series. A recent example is KitchenAid having its stand mixer used on Jennifer Garner's social series "The Pretend Cooking Show."
- Agency **Mark Allen & Co.** launched PrideNOW, a specialized consulting service designed to help marketers navigate "the increasingly challenging marketing environment and connect with the spending power of the fast-growing LGBTQ+ community year-round." Estimated spend in the global LGBTQ+ community is \$4.7 trillion.
- New agency **Corner Table Creative** launched with the goal of disruptive delivery that produces fast, top-quality work. The agency removed creative and departmental silos from the process, and "deployed a model that doesn't make brands choose between having a lot of content and having great creative," says Madeline Meade, who cofounded the agency with Rachel Brandt.
- The **Joan agency** launched a new practice—Joan Design—which is now expanding its capabilities beyond JoanxMedia, Joan London, and Joan Studios. The new entity creates strategies, brand identities and campaigns, leveraging its AI solution, Artificial Objects, an online gallery of everyday objects imagined in clever ways.
- Per Ad Age, **new specialty agencies** are emerging: Adolescent Content, a certified women-and minority-owned agency, focusing on the Gen Z market and influencers; Openly Gray, focusing on helping brands reach consumers 50 and older; Grace Creative, a woman-owned agency, focusing on reaching women over 50; Heads in the Sky Drones, focusing on helping brands create drone shows; Backbone, a PR agency focusing on outdoor and active lifestyle; Biite, an agency focusing on connecting brands to food culture; and Supernatural AI and Rehab agency, focusing on helping brands leverage AI or develop AI solutions.
- Omnicom reorganized its advertising agencies and networks—including creative networks BBDO, DDB, and TBWA, and leading agencies within the Advertising Collective (Goodby Silverstein & Partners, GSD&M, Merkley & Partners, Zimmerman, etc.)—into a single unit called the **Omnicom Advertising Group**. The move intends to scale innovation and knowledge sharing across the holding company's creative networks. Clients now have access to a wider range of talent. The move is similar to the way other parts of the company are organized by practice area: Omnicom Media Group, Omnicom Health Group, Omnicom Precision Marketing Group, and Omnicom Public Relations Group.
- Former Walmart client-agency staffers teamed up to launch a new firm called **Beers With Friends** as an alternative to traditional AOR models. The new entity delivers marketing solutions in five-day ideation "sprints" that they call "beer runs" (available in single "servings" or "packs" of four, six, and 12). A curated team of experts collaborates during intensive problem-solving sessions. Existing clients include Virgin Galactic, Perfect Bar, and Hally Hair.
- A new women-founded, New York-based creative agency called **Slim** has launched, designed to provide clients with smaller teams, bigger talent, and fewer hierarchical layers. Lyft, SoulCycle, and Chomps are among the firm's inaugural clients. The agency's adaptive hybrid model bridges the gap between in-house work and outsourcing, working closely within brand and marketing teams to produce strategy, creativity, and production.
- Interpublic Group launched **Mediabrand Health**, a specialist unit to provide "scaled, global media services." The unit works with sibling agencies, and with IPG Health's customer intelligence product SOLVE(D) and data practice Acxiom Health to better unify the firm's healthcare solutions.
- New Rockville, Maryland-based creative agency **Notorious111** launched, after being previously owned by WPP-owned communications agency Burson. HZ's five women leaders now own the agency. Clients include Volkswagen, Monumental Sports, and Kawasaki.
- **Publicis Groupe's Digitas** launched the next generation of its social offering S.W.A.T. (Share-Worthy and Trending) in partnership with TikTok, KERV.ai, GoPuff, and Epsilon Digital. S.W.A.T. allows clients to design shoppable social experiences that heighten engagement with target audiences.



- London agency **BMB** launched BMB Forge, a new brand strategy and design offering, providing end-to-end brand development—from initial strategy to visual identity.
- **Candid** launched RLVNT, a media marketplace that makes real-time digital advertising directly accessible to both advertisers and agencies aiming to fully leverage programmatic and digital advertising across all media channels.
- Integrated independent and employee-owned agency **Known** launched an experiential practice, Known Experimental, that uses data science to help marketers uncover what exactly makes their brands resonate with consumers.
- **WPP's VML** launched a new unit called Brand Design, which aggregates the agency's capabilities in design positioning, visual and verbal identity systems, and brand architecture and governance, with agency hubs in Kansas City, Missouri; New York; Denver; Chicago; and Miami.
- **Havas Lynx** launched a global healthcare influencer offering with more than 50 influencers spanning 14 therapy areas. It's designed to leverage the power of influencers to “drive health outcomes and behavior change” by developing an array of content across social channels and hosting podcasts.
- **Interpublic Group** launched a new production engine, IPG Engine, developed by its Kinesso division by integrating Adobe's generative AI-driven platform GenStudio into its own martech platform. The move intends to unify content creation. The solution integrates data flow across the campaign lifecycle—from brand research and audience insights to creative ideation; production; commerce and CRM programs; earned media; and power media activation and optimization.
- **Havas** launched Havas Red in Japan, expanding services with enhanced earned, social, experiential, and content capabilities under a merged media model.
- **Stagwell's Code and Theory** launched a Government Experience (GX) practice. The GX unit utilizes the agency's strategic consulting, technical capabilities, and user-focused design expertise to help modernize government services.
- **WE Communications** expanded its presence in APAC by opening its Chase Advisors office in Malaysia.
- **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.
- **Stagwell** and ad tech company Nexxen announced a partnership to offer a suite of tools via the Stagwell Marketing Cloud, designed to help clients better identify and shape target audiences and behaviors while optimizing spend by leveraging the newly launched Nexxen Data Platform—an expansion of its proprietary data management platform.
- **Coca-Cola** developed nine worldwide StudioX teams with WPP, 5,000 people strong, with a goal to deliver new, experience-focused models through data, social, creativity, design, and media.
- In July, **Procter & Gamble** once again partnered with Ad Age's Small agency Conference & Awards for The Elevator Pitch. Agencies signed up for an Elevator Pitch appointment time, during which they pitched their agency to P&G executives in the room for five minutes. P&G then reached out to selected agencies for a more in-depth capability session with their corporate team.
- Havas e-commerce division **Havas Market** announced a global partnership with Shopify to bolster its capabilities in direct-to-consumer e-commerce. The two firms are collaborating on the development of customized solutions that leverage Shopify's retail operating system and that will plug directly into Havas Market's propriety technology.
- **Omnicom** and its Omnicom Media Group announced a partnership with Amazon and its Amazon Ads service, enabling the holding company to access Amazon's proprietary browsing, shopping, and streaming insights to directly tie linear and CTV investment to purchases made on Amazon. Omnicom clients such as Clorox Co. can achieve greater efficiency across their full-funnel marketing campaigns.
- **GroupM** and the retail media business of Tesco, the UK's largest supermarket chain, created a partnership focused on innovation and data-led solutions in the retail media space. GroupM will leverage data owned by the grocery giant to develop insights and hone strategic planning capabilities in retail media.
- Three pieces of relationship advice from independent agency Venables Bell + Partners, on being “**Better Together**,” courtesy of the ANA:
 1. Thinking you know better. Treatment: Leave the egos at the door.
 2. Wanting to protect us from the mess. Treatment: Be ruthlessly honest.
 3. Treating it like a competition. Treatment: Put us in a box (nicely).

Partnership and collaboration

- **Microsoft** expanded its collaboration with Omnicom to include access to audiences across the Microsoft Advertising Network through the Microsoft Advertising solutions and inventory within Omni, its marketing platform.
- 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.

- WPP’s GroupM announced an exclusive “**integrated commerce solution**” partnership with Pacvue, a platform that manages commerce and analytics for major retail marketplaces, including Amazon and Walmart. Exclusive terms include:
 1. Access to unified Amazon Marketing Cloud (AMC) Analytics via the direct integration of GroupM’s diagnostics and visualizations
 2. Data integration powered by GroupM and custom GroupM rules and algorithms
 3. Retail operations via an easy-to-use interface and reporting dashboard
- Per AKA, brands can engage in understanding **agency culture** in the following ways:
 1. Ask about the culture
 2. Prioritize long-term relationships
 3. Respect work-life balance
 4. Invest in the partnership
 5. Get to know your project team

- **WPP** announced a global partnership with Roblox, a leading immersive gaming and creation platform for building interactive 3D brand content and advertising (gaming is the fastest-growing channel to reach Gen Z). The alliance intends to scale expertise among agency teams and brands by leveraging Roblox as a new media channel.

Research and organizing for success

- Per marketing matchmaker Setup and its 2023 Marketing Relationship Survey, 55% of brand advertisers were considering a **change of agency** in the next six months (vs. 38% in 2022 and 30% in 2023). Among primary drivers:
 1. “Dissatisfaction with value”
 2. “Dissatisfaction with delivery”
 3. “Change in the agency’s personnel”

ARTICLE

Can your agency partnerships FLY?



READ MORE

Visit agencymania.com/unlocking-efficiency-four-steps-to-powerful-agency-management to check out our article, “Unlocking Efficiency: 4 Steps to Powerful Agency Management and How to Handle Roadblocks”: Advertiser relationships are under greater scrutiny to do more with less. Brands must implement a step-by-step approach to a more automated, streamlined, and smarter way to engage with agencies and deliver organizational value.



- Per Mercer Island Group, the **client-agency “readiness for a great year” checklist** includes: Vows, SOW Alignment, Marketing Calendar, Workflow, Briefs, Rolling 30/60/90 Work Plan, Top-to-Top Call, the “Must See” Call, Interagency Team, Client/agency 360, Annual MSA Review, Annual Plan Briefing, Target Audience Learning Plan, Approval Processes, Business Conversations, Business Need Alignment, Training Plans.
- **Pile and Company** published a breakout of their 2023 agency searches on behalf of brands:
 1. Restaurants (31%)
 2. Financial services (19%)
 3. Athletics and sporting goods (14%)
 4. Consumer services (6%)
 5. CPG/Food (6%)
 6. Healthcare (6%)
 7. Home furnishings (6%)
 8. Manufacturing (6%)

“
Proper feedback is an important element of our daily personal lives, and it should not be dismissed when it comes to this kind of work. Feedback matters.”

Andrea Stillacci
Founder and President, **Herezie**

HEREZIE

- 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.
- Per IBISWorld, there were 433,410 **advertising agencies in the world in 2024**, a 1.7% increase from 2023. In the United States, there were 89,912 advertising agencies in 2023, a 4.1% increase from 2022. The states with the most advertising agencies are California, New York, and Florida. The number of businesses in the global advertising agencies industry has grown 2.6% per year on average from 2019 to 2024.

- Per Chief Martec and the blog’s editor, Scott Brinker, the **2024 marketing technology landscape** grew to 14,106 martech products (27.8% growth YOY). The martech landscape grew for the 13th year in a row with a net addition of 3,068 products compared with 11,038 in 2023, a 41.8% compound annual growth rate. Churn was only 2.1% from 2023 to 2024, Brinker reports.
- Released jointly by the 4A’s (American Association of Advertising Agencies) and the ANA in partnership with Advertiser Perceptions, “**The Cost of the Pitch II: The Rise of Value**” examines the importance of trust, value, cost, transparency, and respect. Per the study, 46% of clients and 61% of agency executives have no system in place to assess the value of client relationships. 90% of brands state that the overall value and long-term ROI of advertising campaigns outweigh cost considerations.
- Per LinkedIn and Ipsos, 67% of CMOs expected to go through a **reorg** in 2024. More than 4 in 10 said they went through a reorg in 2023. 88% are seeking bolder and more creative campaigns. 67% are increasing their budgets to make it happen.
- Per Forrester Research, 63% of Fortune 500 companies have a **CMO** on their leadership team, reporting to the CEO. This varies by industry: financial services and insurance (91%), utilities and telecommunications (88%), retail and wholesale (86%), high-tech manufacturing (79%), media, entertainment, leisure and hospitality (69%), healthcare (65%). 84% of B2C Fortune 500 companies have a conventional CMO role, compared with 48% of B2B firms.
- Per **Atlantic Brands**, traditional pitch deck templates dilute the story by boxing ideas and energy into a predetermined flow. Instead, they suggest a four-part pitch cycle:
 1. Capture imagination
 2. Introduce the opportunity
 3. Drive the business argument
 4. Ask for investment
- Per R3, Publicis Groupe leads the **Global Q3 2024 New Business League rankings**, setting the pace with 1,277 creative and media wins and a 4.2% revenue increase from 2023. WPP is second with 721 wins, and Omnicom is third with the highest YTD media revenue.
- Per the World Federation of Advertisers (WFA), key survey findings about the **marketing procurement profession** and the need to strengthen skill sets:
 1. One in two respondents do not feel their team is future-fit
 2. Top differentiating skills are under threat and future skills may still be unmastered
 3. Using AI might be a way to progress on the maturity curve
 4. Increased globalization could put local teams at risk
 5. Lack of qualified candidates is a key challenge



Responsible advertising

- Per Ad Net Zero, only 35% of agencies have set science-based **net zero targets** and 54% have set certain near-term targets.
- The **Institute for Advertising Ethics**, an independent nonprofit educational foundation, launched certification programs for advertising professionals through a diversified advisory council that unifies industry north stars, government agencies, civil society, and leading academic institutions.
- Ad leaders launched **Blackweek**, a conference organized by Black and Latino leaders motivated to address the state of industry diversity by solving brand issues and focusing on media, creativity, healthcare, and private equity.
- 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).
- 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.
- **Coca-Cola** launched its LGBTQI+ Inclusion Network focused on creating a safe and inclusive environment for employees while building a more diverse workplace, community, and business. Other internal networks are Gender Balance, Culture & Heritage, Generations & Life Experiences, and Ability & Wellness. Coca-Cola is also a partner of myGwork, a business community for LGBTQ+ professionals and students.
- **General Motors'** commitment to supporting diverse media suppliers includes meeting or exceeding Black-owned media goals of 8% of its total media budget. The company states that its total investment with diverse-owned and targeted media in 2023 reached more than 14% of its effective total annual media spend.
- **Target** pledged to spend 5% of its annual media budget with Black-owned media companies every year since 2021, and the brand states that it is on track to do so.
- **Coca-Cola** committed to have Black, Hispanic, and Asian American and Pacific Islander-owned media companies account for 8% of its total annual media budget in North America by the end of 2024. The brand is confident it will reach that goal.
- The World Federation of Advertisers (WFA)'s Global Alliance for Responsible Media launched, in partnership with Ad Net Zero, the first version of the **Global Media Sustainability Framework**, which consists of voluntary industry standards by which agencies, platforms, and publishers can measure and report their carbon emissions footprint across six media types in a consistent fashion.
- The WFA released a new playbook called "**Unlocking Creativity: The Impact of DEI on Content Production.**" Per the WFA, 49% of major multinational firms are struggling to measure diversity, equity and inclusion (DEI) efforts in the content production space and find it hard to set consistent targets across markets and suppliers. 40% are struggling to identify diverse suppliers. 24% of brands always measure progress in relation to supplier diversity in production, 9% do so very frequently, and 21% do so occasionally.
- **United Nations** Secretary-General António Guterres condemned the advertising industry for greenwashing (with lobbying, legal threats, and massive ad campaigns), demanding that agencies drop fossil fuel clients and calling for a ban on fossil fuel advertising.
- **Havas** has lost its B Corp status after an investigation into Havas's contract with Shell to do global B2B media work for the fossil fuel giant. B Lab UK, the body that certifies organizations as B Corp, said Havas violated the core values of the B Corp community. B Corp status denotes high standards of social, environmental, and corporate governance. Havas accepted the ruling and said, "Our level of commitment towards sustainability remains unchanged."
- The **ANA** published its "ANA Ethics Code of Marketing Best Practices," a detailed code of ethics spanning 82 pages, covering emerging areas such as AI; machine learning; nonfungible tokens (NFTs); cryptocurrency; diversity and inclusion; audiences (children, older adults, disabled); transparency; consent; disclaimers; watermarking systems; data governance and privacy; and regulated products (cannabis, tobacco, alcohol, and others).
- The new **Kids Online Safety and Privacy Act**, which combines the Kids Online Safety Act and the Children and Teens' Online Privacy Protection Act, sets new precedents for tech firms and advertisers. It aims to tackle potential harms associated with social media use, including depression, eating disorders, and online bullying. New self-regulatory privacy groups such as the Network Advertising Initiative encourages "responsible companies" to not collect or use children's data for targeted advertising without first obtaining explicit consent.



- The ANA issued its **Ethics Code of Best Marketing Practices**, a framework of high-level principles, guidelines, resources, and examples of ethical marketing and advertising best practices. Topics include audiences (children, older adults, disabled); diversity and inclusion; data privacy; security and stewardship; regulated products (tobacco, alcohol, etc.); and digital innovation (e.g., AI, machine learning, and automated processing).
- Not-for-profit initiative **Global Alliance for Responsible Media (GARM)** discontinued its activities, stating that “recent allegations that unfortunately misconstrue its purpose and activities have caused a distraction and significantly drained its resources and finances.” This move follows Elon Musk’s and X’s decision to sue the ad trade group, accusing it of conducting an advertising boycott.
- Per consulting firm **McKinsey**, brands that are committed to diversity perform better financially than their competitors that do not: Companies in the top quartile for ethnic diversity have, on average, a 27% financial advantage over their peers.
- Per **ANA AIMM**, 14 million US adults identify as LGBTQ+ (7.2% of the population), with nearly 1 in 4 Gen Z identifying as LGBTQ+. Per GLAAD, LGBTQ+ people were featured in only 3% of the 436 TV ads from the top 10 largest advertisers with 53% of LGBTQ+ consumers saying they feel unseen in brand advertising. \$28 million in industry ad spend was allocated to LGBTQ+ targeted advertising across all media in 2023 (0.03% of total ad spend).
- Per the ANA’s **LGBTQ+ Marketing Inclusion Survey**, 55% of advertisers engage in LGBTQ+-inclusive marketing. 34% of advertisers include LGBTQ+-targeted media in their inclusive marketing. Challenges include navigating brand-safe environments (39%) and consumer resistance (39%). 82% believe brands should increase their LGBTQ+ marketing efforts, highlighting the need for more support.
- The ANA issued its “**Sustainability in Media Planning**” report, which states that the ad industry—particularly digital ads—is a major contributor to emissions: billions of ad impressions each day, and every 1,000 emit between 50 and 1,500-plus grams of carbon dioxide, or the equivalent of driving 10 minutes in a standard gas-powered vehicle. Suggestions include adopting tools to reduce emissions, choosing an activity-based measurement model, adopting automated green media solutions, and eliminating MFA (made for advertising) inventory.
- **DE&I** commitments are being challenged, and agencies are adapting to this new reality. Brands such as Ford Motor, Lowe’s, Harley-Davidson, John Deere, and Molson Coors have apparently scaled back DEI commitments amid economic uncertainty and cultural backlash.
- Per a survey from She Runs It and DEI consultant Seramount, **gender and race/ethnicity representation** is a crucial requirement in RFP processes for agencies and other vendors stewarding their businesses (86% of respondents).

- WPP-owned media buying agency GroupM exceeded its goal to double the annual media spend on **women’s sports programming**, thanks to major advertisers increasing their commitment to women’s sports, including Adidas, Adobe, Danone, Discover, Domino’s, DoorDash, Google, Mars, Nationwide, Target, TJ Maxx, and Unilever.
- The international nonprofit **One Club for Creativity** and **WPP** announced they will continue their successful partnership for the second year of ONE School UK, a free 16-week online portfolio program designed to open doors to a career in advertising and marketing services for talented UK-based Black creatives.
- **L’Oréal** launched an inclusive sourcing project with Aquent Studios that is designed to create more opportunities for people from underrepresented communities, including dimensions of diversity such as ethnicity, gender, age, and military status.

Training and new ways of working

- “How can your agency avoid the canceled pitch?” asks **The Drum**. In light of agencies spending large amounts on pitching, and then a third of pitches being canceled, The Drum launched a guide on responding to reviews responsibly. The guide has actionable templates to help agencies:
 1. Qualify the opportunity
 2. Educate the client
 3. Transfer the liability in any pitch situation
- 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.
- The ANA released its **Principal Media Report**, which provides guidelines for marketers to ensure they are getting fair value from agencies that are reselling media to them. The report highlights issues such as a lack of transparency, audit restrictions, lower value media inventory, loss of agency volume bonuses, and compromised media neutrality.
- The **ANA** announced the launch of a new entity, named Aquila, in its quest to develop and operationalize a scalable cross-media measurement (CMM) solution. A CMM system “will support a broad range of use cases for planning, optimizing, post-campaign reporting and outcome measurement,” according to the ANA press release. Aquila has formed partnerships with Kantar Media and Accenture to carry out phases of the initiative. The goal is to enable unduplicated reach and frequency capping across platforms. Advertisers such as P&G and tech giants Google, Meta, Amazon, and TikTok are among the financial backers.



- The ANA launched its **Data Excellence and Privacy Practice’s Data Visualization Playbook** to equip marketers and practitioners with practical techniques and best practices to harness the full potential of data visualization.
- An increasing number of agencies, such as Beers With Friends, Barrett Hofherr, Liquid Agency, Fortnite Collective, Crema agency, X&O, Luquire, nice&frank, and Dept, are experimenting with **sprint models, spark sessions, or lean collaborative solutions**. The aim is to produce quick-churn and high-value concepts within a few days to weeks and at a fixed price. Some of these agencies rely on in-house talent while others tap freelance resources based on client requirements.
- The 4A’s published its Standard for **“Agency Operations & Business Transformation,”** the first playbook for AOBT professionals. Produced by its members (agencies of all sizes), the AOBT Standard includes topics such as Capacity & Resource Management, Operations & Financial Stewardship, Change Management for agency Operations, Technology Investment, Management, Adoption & AI, Macro Scope of Work Management, and Business Intelligence.
- The ANA released its **“CMO’s Playbook for MarTech”** to guide CMOs through the complexity of today’s landscape. The guide has strategies and insights to build a high-performing marketing technology operation. Key topics: data quality, integration, content supply chain, C-suite alignment, talent and organization, in-house vs. outsourcing, and measurement.

2024 Agency profiles

- **Culture+ (cultureplusgroup.com)** is a woman-and minority-owned (Hispanic) agency bringing under one roof the discipline of big consulting and the sophistication of tech and AI, combined with the creativity of agencies, to unlock the power of culture in business. Located in Miami and Irving, Texas, the agency includes AI-powered research (Human Dot Plus), shopper and experiential (The Choice+), and inclusive strategy and marketing (CIEN+ and CIEN+ Health). The family of independent companies, including CIEN+, Culturlntel, and The Choice+ offer proprietary research, strategy, training, and marketing solutions uniquely designed to better understand, reach, and accelerate growth with diverse markets. The agency’s tagline is “Driven by data, inspired by culture.” Clients include Pfizer, GSK, Johnson & Johnson, and UHG.
- **Prose on Pixels (proseonpixels.com)** is a Havas-owned, London-based global content and production agency at scale, focused on audience-first production. It launched in June 2023 as a consolidated production offering across Havas’s global networks, focused on an AI-powered “audience first” model (scope definition, craft enhancement, measurement, and optimization). Capabilities include origination (bespoke film and photographic content), video (offline and online editing, animation, and motion design), print (press, retail, point of sale, outdoor), digital (e-commerce, apps, UX/UI), audio (podcasts, VO, radio spots, and sound design), dynamic (creative optimization and automation), and language services. Prose on Pixels has more than 500 staff in 13 locations.

- **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.



Ultimately the chosen remuneration model will dictate the type of relationships clients want to have with their agencies.”

Laura Forcetti
Director, Marketing Services Asia Pacific, **WFA**



World Federation
of Advertisers

- **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.



- **Curiosity ([curiosity.fun](#))** is a Cincinnati-based, independent, full-service agency that “lives and breathes the power of being strategically curious.” Services include strategy, advertising, social media, insights, web development, television commercials, media, creative, content, brand strategy, identity development, digital media, direct mail, media planning, media buying, media strategy, and analytics. Curiosity was named a two-time Ad Age A-List Standout, a two-time Ad Age Small Agency of the Year, an Effie finalist, and a Campaign Agency of the Year. The agency’s mantra: Question the unquestionable. Question everything. Clients include Dude Wipes, FreshDirect, Holland America Line, Brooks, and Stonefire.



If you have tools that make people more effective and more efficient, those people become more valuable.”

Jon Moeller
Chairman, President, and CEO, **Procter & Gamble**



- **Said Differently ([saiddifferently.com](#))** describes itself an “untraditional” independent agency, organized as a global talent network with 3,500+ consultants, specialists, and experts around the world. The agency creates bespoke, nimble teams to serve clients across creative, strategy, and digital transformation. Services offered include product and platform design (building customer-centric app design and commerce programs, connected commerce, and app design), CX lead brand strategy (brand experience, web platforms, brand identity, brand strategy), performance marketing (dynamic creative, AI and machine learning, test planning, data and analytics), customer experience (CRM, loyalty, membership). Clients include US Cellular, Neiman Marcus, and BSRB Group. The agency recently merged with Brainvire, a global digital transformation firm.
- **Battery ([batteryagency.com](#))** is the lead creative agency of the Paris-based Havas, with offices in Los Angeles, Chicago, Toronto, and Shanghai. Headquartered in LA, the agency “creates advertising that’s as sought after as entertainment.” The agency provides the following services: brand strategy and planning, advertising, storytelling, video production (TV and digital), out of home, design, social, measurement, branded content, integrated campaigns, and creative. Clients include Land O’Lakes, Royal Bank of Canada, Hulu, Warner Bros. Games, Anaheim Ducks, Gran Coramino tequila, Habit Burger, Netflix, LEGO, Los Angeles Clippers, Activision, Fidelity, Angel City Football Club, and PUBG. Battery is a three-time Ad Age Agency of the Year.
- **Milk Agency ([milkagency.com](#))** is an independent New York-based full-service agency for brands that “don’t want an agency.” Born out of Milk Studios, the agency leverages a 20-year history of collaborating with the world’s biggest marketers. Their “Be.Say.Do” philosophy guides their partnerships through capabilities including research and brand strategy; social, content, and creative strategy (including art direction, packaging, and conceptual creative); and community management, experiential, and environmental design. Clients include Nutrafol, Nautica, New Balance, Postmates, Target, Equinox+, Intel, David Beckham, Warner Media, and Red Bull.
- **Preacher ([preacher.co](#))** is a full-service creative company based in Austin, Texas. The agency states that it partners with brands, products, and services it truly believes in, and markets them with conviction, craft, and soul. They call it “spreading the good word.” Agency services include advertising, branding and brand strategy, marketing, digital, retail, experiential, and design and identity. Clients include Coca-Cola, Foot Locker, ESPN, YETI, The Container Store, We Transfer, and Shake Shack.
- **Quality Meats Creative ([qualitymeatscreative.com](#))** is a small, Chicago-based integrated advertising and creative agency with an office in Austin that’s built like a production house. Their approach is “Nobody cares what you have to say (not you, but your brand),” promoting work that is honest and makes people care. Services include brand strategy, creative, production, and communication strategy. The shop opened in the middle of pandemic (2020). Clients include Huggies, Samsung USA, DoorDash, Kimberly-Clark, Regal Cinemas, and Cava. The agency was awarded 2023 Ad Age Small Agency of the Year (11-75 employees).
- **Within ([within.co](#))** is a New York-based, independent, performance branding company that helps clients align marketing and business objectives through integrated media and content services. Services include digital marketing, PPC advertising, affiliate marketing, SEO, retargeting, CSE marketing, PLA marketing, conversion rate optimization, email marketing, display media, tag management, analytics services, performance branding, performance marketing, influencer marketing, omnichannel strategy, branded content, integrated media, and Amazon Marketplace. Within describes itself as the “single marketing solution for the world’s leading brands. We grow brands by fusing performance media with branded content.” Clients include QVC, Timberland, Laura Mercier, Rite Aid, North Face, Ben & Jerry’s, Foot Locker, Movado Group, and Casper.
- **Moon Rabbit ([wearemoonrabbit.com](#))** is an independent, New York-based advertising agency “created by a rare breed of people who aren’t satisfied with being conventional.” The agency specializes in healthcare, brand strategy, consumer experience, brand ID, performance, digital, creative and content, marketing, mobile applications, video, advertising, influencers, and design services. They also have offices in California and Singapore. Clients range from boutiques to blue chips and from consumer to biotech, including Tarsus Pharmaceuticals, Guardant 360, and Aristocrat Gaming.



- **Oliver (oliver.agency)** is a London-based advertising services firm dedicated to designing, building, and running bespoke in-house agencies and ecosystems for brands. Capabilities include organization transformation, performance marketing, brand-building content and social, integrated campaigns, e-commerce, production, experience planning and UX design, consulting, digital platforms, and SEO. It operates in 46 countries, with 3,000 staff and 19 offices. The firm is part of the Inside Ideas Group (IIG), which combines specialties from Adjust Your Set (content and culture), Dare (design, experience, and engineering), and Aylesworth Fleming (property marketing). IIG joined marketing technology firm The Brandtech Group (formerly You & Mr Jones) in January 2019. Key strengths are brand-immersed teams, offshore production resources, and proprietary technology. Client solutions include Unilever's U-Studio (a platform used by almost three-quarters of Unilever's brands globally) and Adidas' offshore hub. Other clients: Dove, Rexona, Axe, Closeup, Google, Pepsi, Microsoft, PayPal, Bayer, Venmo, Reebok, Philips, BMW, The Guardian, and WestJet. In 2020 they were ranked #1 in Adweek's Fastest Growing list (US) and were Adweek's Fastest Growing Large Agency 2020-2021 North America.
- **Iris Worldwide (iris-worldwide.com)** is a London-based firm that calls itself "the Participation Agency." With 1,000 staff in 14 offices worldwide, Iris combines creativity, data-driven media, and people to help brands, such as Samsung, Adidas, Bentley, Pizza Hut, Beiersdorf, and Samsonite, travel further and faster. Services: CRM; content marketing; B2B marketing; tech and innovation; healthcare marketing; social and influencer; pricing consultancy; performance marketing; advertising; data insight; PR and partnerships; and digital. Iris is part of Cheil Connect+, a global collective of agencies including Barbarian, BMB, Cheil, CYLNDR, and McKinney.
- **Eversana Intouch (eversanaintouch.com)** is a full-service global advertising network based in Overland Park, Kansas/Chicago, Illinois, that focuses on healthcare and is backed by a fully integrated commercial services platform, with six offices in the US, two in Europe, and one in India. The agency served as AOR for 39 brands in 2023 (Biogen, Astellas, Regeneron, GFT, Evoke Pharma, etc.) and generated 23 million new prescriptions in 10 therapeutic areas. In 2021 Eversana acquired Intouch Group to form Eversana Intouch. They are an eight-time pharma agency of the year winner, ranked among the top five creative agencies, and a global independent pharma agency of the year. With more than 7,000 employees, the agency's core services are product commercialization and launch; brand strategy; branding and creative; medical communication; tactical execution; and digital, social, and specialty services.

Noteworthy quotes

- » "Simplicity will be at the heart of agency evolution." —Jon Cook, Global CEO, **VML**
- » "Brands are seeking to streamline and consolidate agency services and relationships." —Chris Copacino, Executive Director of Business Development, **Copacino Fujikado**
- » "AI will shift from an experimental trend to an essential tool embedded within the art and advertising world. It's a force multiplier that will allow creatives to explore new paths and open new lanes of opportunity." —Rob Kottkamp, Chief Creative Officer, **Partners + Napier**
- » "The boutique-ification of the industry will continue—not just for creative agencies, but also for media ones that understand how to serve up campaign work in ingenious ways." —Micky Ogando, President and Chief Creative Officer, **Bakery**
- » "AI will become the tool, not the point; the means, not the end. We're already using it for ideation and pitches, and we're just scratching the surface of what it can enable." —Stevie Archer, Chief Creative Officer, **SS+K**
- » "Organizational creativity, once elusive, has recently become measurable through AI-driven data capture and is now a valuable source of capital." —Lisa De Bonis, Global Chief Product Officer, **Huge**
- » "There's a big dragon arriving in our industry, and we've clumsily tried to climb up on the dragon instead of staying on the earth and looking at it flying away. So, yes, it's clumsy, but at least we're on the dragon." —Frédéric Raillard, Founder, Chief AI Officer, **[Ai]magination**
- » "2024 is going to be loud. Very, very loud. Those who decipher how to be heard, despite the noise, will succeed." —Marissa Nance, CEO and Founder, **Native Tongue Communications**
- » "The experience of talking to the data is the result." —P.J. Pereira, Co-Founder and Creative Chairman, **Pereira O'Dell**
- » "ChatGPT era means basics and average (strategy, creative, design, insights) are FREE. Fast research for manifestos, straplines, headlines and scripts, jingles, logos and design-in-a-box. Anyone can now get in seconds what used to take hours or days. In the past, even average cost money. Is free good? I never trusted that free is truly free. There were always strings attached. Today, free = mediocrity." —Matt Weiss, Global President, **Huge**



- » “Generative #AI can completely reshape the marketing industry as we know it. If we want to embrace change, we have to find ways to make AI work for us—not against us!” —Alyson Griffin, Head of Marketing, **State Farm**
- » “To be a better agency, be the best part of the client’s day. Agencies have the ability to bring positivity to a relationship. While ideas are important, people are more important. Value the people that are on the team.” —Brad Audet, CMO, North American Operations, **Mazda**
- » “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**
- » “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**
- » “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**
- » “What we’re looking for is not service providers. We’re looking for partners.” —Victoria Lozano, Executive Vice President, Marketing, **Crayola**
- » “The new generation of agencies are going to have to focus on quality of thinking, rather than quantity of content.” —Steve Walls, Director, Global Strategy, **Moon Rabbit**
- » “I want our community to be seen for the strength of our values, and not weakness as a result of the model minority myth.” —Michelle Tang, Global Chief Growth Officer, **McCann**
- » “If it smells like an agency and it talks like an agency, it is an agency.” —Marla Kaplowitz, President and CEO, **4A’s**
- » “No one is born to be a champion. It can only be earned—through equal parts philosophy, execution, and sheer determination. I’ve won and lost championships, business deals, and relationships. I’ve learned that our best moments come after we’ve faced our most devastating defeats—when we choose to rise with unwavering resolve. That’s The Way of the Champion.” —Paul Rabil, Co-Founder and Principal, **Premier Lacrosse League**
- » “One of the things we keep repeating in Coca-Cola is it’s about AI and HI. It’s artificial intelligence and human intelligence and ingenuity.” —Javier Meza, President, Marketing, and Europe CMO, **Coca-Cola**



- » “I wish the whole industry would confidently say ‘no’ more often. No to contractual terms that make no sense. No to pitches that continue to go on and on and on. No to [working] on holidays.” —Maggie Jennings, Chief Growth Officer, **Tombras**
- » “We’re leveraging gen AI now to be able to show more than just an item recommendation but really topics, marketing, copy all of these different areas that we can now leverage to create a more inspirational message for our customers.” —Adrian Fung, Global CMO, **eBay**
- » “AI should be viewed as an enabler and amplifier of human creativity, not as a replacement for it.” —Naomi Troni, Global CMO, **VML**
- » “Don’t worry about fitting in—focus on not fitting in. Embrace your uniqueness as a source of strength to bring diversity to deliver creativity and success.” —Francois Lee, Senior Manager, Streaming TV Upfront and US Agency Development, **Amazon**
- » “The only thing more widespread than AI at the moment is the noise surrounding it.” —Arthur Sadoun, Chairman and CEO, **Publicis Groupe**
- » “My complaint is directed at agencies, companies and brands using the term AI like the corporate equivalent of Botox, injecting it everywhere in a vain attempt to make their companies look younger.” —M.T. Fletcher, Columnist, **Ad Age**
- » “While our industry is continually changing with new media channels, platforms and technologies, the one constant is creativity and talent.” —John Wren, Chairman and CEO, **Omnicom Group**
- » “Technology like gen AI has removed many of the roadblocks that once existed in bringing ideas to life. It has created access to infinite amounts of information and allowed us to connect and share ideas faster and easier than ever before.” —John Wren, Chairman and CEO, **Omnicom Group**
- » “Brands are not competing against AI. They are competing against other marketers that leverage AI.” —Marta Martinez, Managing Director, IAB Digital Sales, **Google**
- » “In the last year, over 50% of our global ads were shot by a female director or photographer. We know this is good for creativity, good for business, good for our industry and good for society.” —Grainne Wafer, Global Director, Beer, Guinness, Smirnoff & Baileys, **Diageo**
- » “When you can establish a true union between humans and machines, this technology can have a multiplier effect on creativity that leads to better ideas and solutions.” —John Wren, Chairman and CEO, **Omnicom Group**
- » “While gen AI is having a profound effect on our industry, it will always only be a partner to our people’s creativity. It’s the rocketship that will launch their creativity to new heights, or as we like to say, give them superpowers.” —John Wren, Chairman and CEO, **Omnicom Group**
- » “Without the data, there’s no applications.” —Scott Hagedorn, Global Chief Solutions Architect, **Publicis Groupe**
- » “DEIB measures in production not only supercharge the effectiveness of creativity, but they also establish concrete metrics to evaluate and govern your key agency and production partners.” —Efrain Ayala, Global Creative Effectiveness and Diversity and Inclusion Director, **Reckitt**
- » “We’re always reinventing. An agency has to reinvent or it’s nothing. You don’t want to say, ‘They used to be good.’” —Rich Silverstein, Art Director, **Goodby Silverstein & Partners**
- » “Despite AI fearmongering, creativity will continue to dominate over technology. It’s actually marketing that makes technology available to the masses, not the other way around, by funding innovation at scale.” —Mark Penn, CEO and Chairman, **Stagwell**
- » “Marketers will become managers of AI systems.” —Adam Brotman, Founder and Co-CEO, **Forum3**
- » “Agencies are made up of people and if you give them good context and manage and lead, they’ll do great. The minute it becomes a vendor relationship, then it’s not working.” —Sharon Otterman, CMO, **Macy’s**
- » “What’s more important in business than relationships?” —Marc Brownstein, CEO, **Brownstein Group**
- » “We’ve gone from a curiosity of what I need to learn [about AI] to how do I make it work.” —Marta Martinez, Managing Director, IAB Digital Sales, **Google**
- » “Let’s face it, if saying ‘AI’ at work were a drinking game, everyone would have died of cirrhosis months ago.” —M.T. Fletcher, Columnist, **Ad Age**
- » “Production companies are now working directly with clients. This bypasses ad agencies, leading to more streamlined processes and direct communication channels.” —Mike Palmer, Chief Growth Officer, **Nice Shoes**
- » “Every time there’s been a tech revolution in creative, there was always an argument that this was going to devour everything, the storytelling, narrative, and creative jobs, but actually, things evolve.” —David Droga, CEO, **Accenture Song**
- » “AI is much more about enhancing our capability than saving money. It’s much more about improving the quality of work that’s produced and the volume of the work that’s produced. It’s very much actually about driving more ROI for clients than saving money.” —Mark Read, CEO, **WPP**



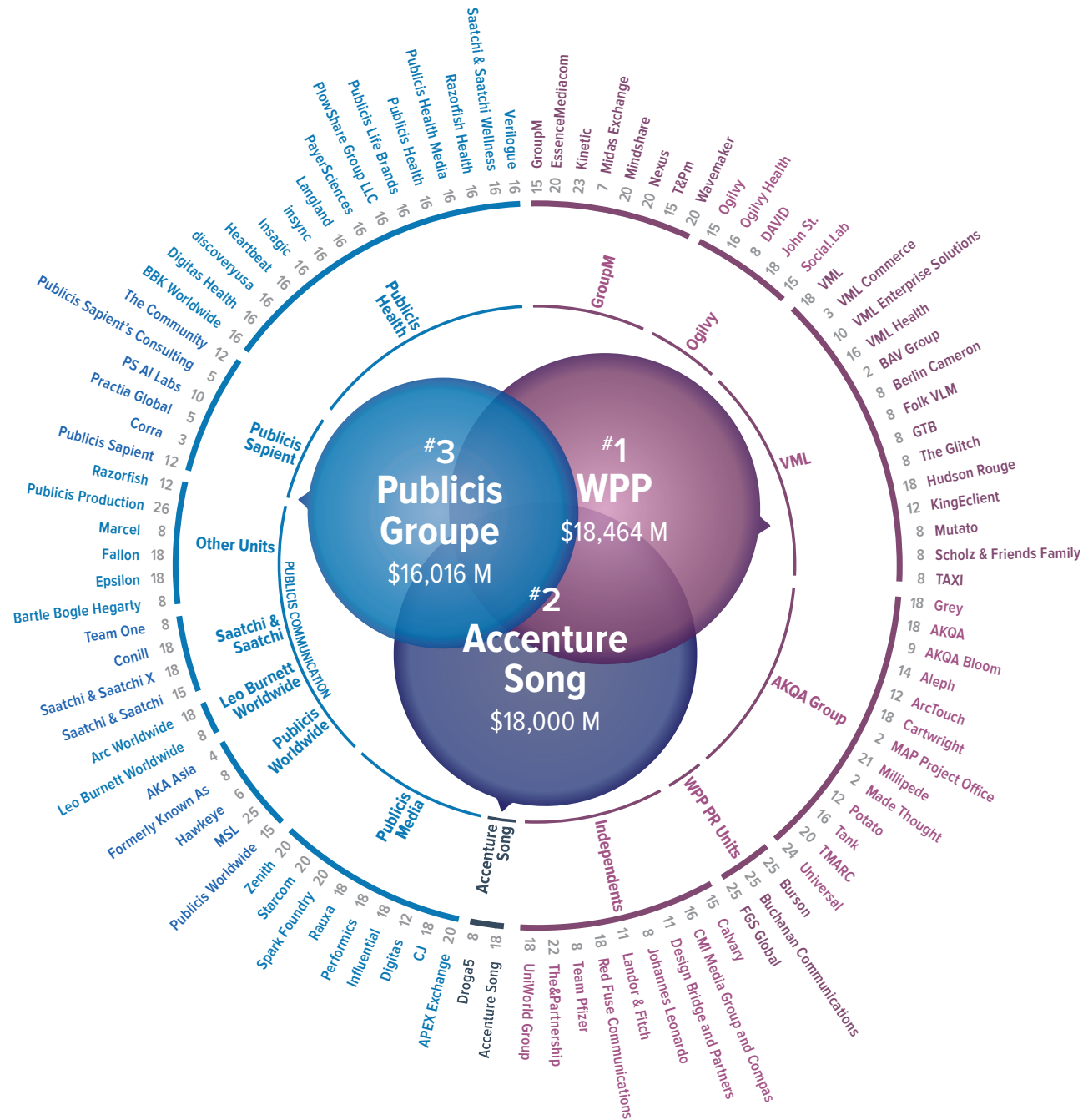
- » “Even when you have AI in the mix, the heart of the creative process is still people.” —Vidhya Srinivasan, VP and General Manager of Advertising, **Google**
- » “With the rapid adoption of gen AI, creativity and talent matter more than ever to address the breadth and complexity of consumers.” —John Wren, Chairman and CEO, **Omnicom Group**
- » “One huge benefit of having an agency in-house is they’re immersed in what we’re doing and understand our portfolio of products and the DNA of the brand.” —Julia Goldin, Global Chief Product and Marketing Officer, **Lego Group**
- » “There’s no doubt AI will lead to smaller, more agile marketing teams. But let’s be clear, there’s a difference between wholesale AI automation and AI augmentation.” —Mike Proulx, VP and Research Director, **Forrester**
- » “Agencies get the clients they deserve.” —Linda Boff, CEO, **Said Differently**
- » “I am teaching myself to use new tools because I believe we shape technology by using it. If it makes you uncomfortably excited, it is probably where you need to be.” —Lorraine Twohill, CMO, **Google**
- » “AI will make us more efficient, but there is no way a machine can create the kinds of crazy, weird connections that those amazing, talented creative people can.” —Lyndsey Corona, Global Partner and US President, **Slap**
- » “It’s not surprising that a lot of agencies are [adding sprint models], but going fast is one thing, going fast and doing it well is another.” —Mike Barrett, Chief Strategy Officer, **Supernatural AI**
- » “Seeing your partner as part of your organization is also integral. Bringing them under the tent fully makes everything happen a lot easier.” —Cecil White, Executive Agent, **WME (William Morris Endeavor)**
- » “Curiosity has never been more important.” —Amanda Ferrante, Chief Growth Officer, **Code3**
- » “Inclusion helps humanize LGBTQ+ [people] and they see brands partly responsible for that and appreciate inclusion efforts from advertisers—and they reward those brands intentionally that include them.” —Carlos Santiago, Co-Founder and Advisory Board Member, **ANA AIMM**
- » “The culture of an agency—its fundamental DNA—often goes unexplored. Culture shapes how teams collaborate, innovate, and deliver for clients, especially if things get challenging. A thriving culture fuels creativity, fosters resilience, and ensures that an agency will retain top talent.” —Elizabeth Furze, CEO of North America, **AKA**
- » “At the end of the day, technology needs marketing more than marketing needs technology.” —Mark Penn, CEO, **Stagwell**
- » “Creativity is always going to be the business multiplier.” —Liz Taylor, Global Chief Creative Officer, **Ogilvy**
- » “At AT&T, we always say our agency partnerships are marriages, not flings. We do really treat it like a marriage in the way that we communicate.” —Lianne Sinclair, Vice President of Advertising and Social Media, **AT&T**
- » “Why AI (in case you’ve been under a rock the last year)? It’s the future. It’s easy. It’s going to eat you for lunch if you don’t master it.” —Matt Weiss, Strategic Advisor, **Huge**
- » “Agencies need to be scouts and guides—essential eyes and ears for clients—not just producers.” —John Harris, CEO, **Worldwide Partners**
- » “Our work as marketers is being remade by AI.... In fact, the function of marketing is in the middle of one of the most pivotal times in history.” —Sarah Kennedy, VP of Global Demand and Growth Marketing, **Google Cloud**
- » “You build brands, not in a day, but over a lifetime. Performance marketing is a Band-Aid for instantaneous growth, but not long-lasting growth.” —Bob Liodice, CEO, **ANA**
- » “If you’re a brand wondering why your peers are investing so heavily in independents, here’s your answer: They want to get back to making advertising with partners who have the power to put them first.” —Jaime Robinson, Chief Creative Officer, **Joan Creative**
- » “Every agency and every marketer deserve compatible partners.” —Danny Robinson, CEO, **The Martin Agency**
- » “Agencies must agree to be transparent about g-AI’s role in their processes, including which tools are used, how they influence cost structures, and what proportion of work involves g-AI versus human input.” —Christine A. Moore, Managing Partner, **RAUS Global**
- » “AI is a talent equalizer. Use this moment to your advantage.” —Sarah Kennedy, VP of Global Demand and Growth Marketing, **Google Cloud**
- » “The Virtuous Circle of Growth. It’s a simple formula: Do great work. Your client is happy. More work comes in. Referrals follow, friends of clients reach out, and those who admire the work want it for themselves.” —Matt Weiss, Strategic Advisor, **Huge**
- » “The advertising landscape is transforming rapidly, with a new paradigm combining AI, machine learning, and human creativity to reshape marketing’s economics and effectiveness.” —Philippe Paget, Editor in Chief, **Adforum**

Top 15 agencies in the world by 2023 revenue

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- 11 Design / Brand Strategy
- 12 Digital
- 13 Event Marketing
- 14 Experiential
- 15 Full-Service
- 16 Healthcare
- 17 Innovation
- 18 Marketing
- 19 Marketing Science + Tech
- 20 Media
- 21 Mobile Gaming
- 22 Multi-Disciplinary
- 23 Out-of-home
- 24 Other
- 25 PR
- 26 Production
- 27 Research
- 28 Specialist Creative
- 29 Sponsorship Consulting



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AGENCY	2022 (Millions)	2023 (Millions)	% Change (yr over yr 2022)	% Change (yr over yr 2023)	Global HQ	Countries #	Employees #
1 WPP	\$17,838.2	\$18,464	1.3%	3.5%	London, UK	>100	114,173
2 Accenture Song	\$16,000	\$18,000	28%	12.5%	NYC, USA	120	UNK
3 Publicis Groupe	\$14,966.6	\$16,016	7.7%	7%	Paris, FR	>100	103,295
4 Omnicom Group	\$14,289.1	\$14,692.2	0%	2.8%	NYC, USA	>70	75,900
5 Deloitte Digital	\$10,317.9	\$12,013	18%	16.4%	NYC, USA	>30	UNK
6 Interpublic Group of Companies	\$10,927.8	\$10,889	6.7%	-0.4%	NYC, USA	>100	57,400
7 Dentsu Group Inc.	\$9,551	\$9,308	-3.7%	-2.5%	Tokyo, JPN	>145	71,127
8 BlueFocus Communication Group	\$5,464	\$7,445	UNK	36.3%	Beijing, CN	UNK	UNK
9 IBM iX	\$6,809.2	\$7,075	6.6%	3.9%	Armonk, USA	UNK	UNK
10 Hakuhodo DY Holdings	\$7,395.8	\$7,029	-1.7%	-5%	Tokyo, JPN	>30	28,894
11 Cheil Worldwide	\$3,305.2	\$3,170	11.7%	-4.1%	Seoul, SK	44	7,000
12 Vivendi's Havas	\$2,915.1	\$3,108	5.2%	6.6%	Puteaux, FR	>100	23,000
13 TCS Interactive	\$2,597	\$2,806	UNK	8%	Mumbai, IN	UNK	UNK
14 Stagwell	\$2,687.8	\$2,527	20.8%	-6%	NYC, USA	>34	13,000
15 Innocean Worldwide	\$1,363	\$1,681	4.3%	23.3%	Seoul, SK	UNK	3,500

NOTABLE CHANGES FROM 2022-2023

- The combined worldwide revenue of the 15 biggest agency companies of 2023 reached approximately \$134,223 million
- Deloitte Digital jumped 1 ranking in 2023 (bumping Interpublic Group of Cos. down in rank), building its digital offerings through internal expansion and the acquisition of Optimal Design Co.
- BlueFocus Communication Group made the top 15 list, landing at spot 8
- Innocean Worldwide saw significant revenue growth in 2023, with its % change year over year up 19%
- Accenture Song saw significant revenue growth in 2023, in part due to acquisitions including Rabbit's Tale and Stagwell's Concentric Life
- Effective in January 2024, WPP merged VMLY&R and Wunderman Thompson to form VML (Ad Age)
- U.S. agency revenue edged up 0.9% in 2023 based on disclosed organic growth for WPP, Publicis, Omnicom and Interpublic (Ad Age)
- Combined worldwide employment for the five largest legacy agency holding companies at year-end 2023 was 10.8% above the level at year-end 2019, before the COVID-19 pandemic
- TCS Interactive made the top 15 list, landing at spot 13



Work and Performance

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

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

Year-end summary

January-February 2024 | Volume 74

AI is not only impacting talent; it's also changing how work is done. There is no better way than attending CES to find out about new technologies, new ways to engage consumers, and new marketing capabilities. It's where the world's leading brands, advertisers, media platforms, and content creators meet to make deals and showcase tech shaping the industry. CES 2024 had 2.5 million net square feet of exhibit space across 12 official venues in Las Vegas. More than 150 countries were represented, and 311 of the Fortune Global 500 attended to hear about 41 different technology categories (e.g., 5G, Artificial Intelligence, Augmented & Virtual Reality, Digital Health, Cryptocurrency and NFTs, Fitness & Wearables, Food Technology, Gaming & Esports, Robotics & Drones, Smart Cities, Smart Home, Vehicle Technology, Web3 & Metaverse).

March-April 2024 | Volume 75

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."

May-June 2024 | Volume 76

Brands have been responding to consumer and social media backlash. Apple apologized for its iPad Pro spot "Crush!" which depicted the obliteration of iconic objects like a record player, a television, cameras, a typewriter, a vintage arcade machine, and more, to form the new, ultrathin iPad. Critics said the ad was suggestive of Big Tech stomping down culture and creativity. Apple said the ad "missed the mark." The dating app Bumble drew heat for billboards, later removed, that seemed to discourage women from celibacy ("Thou shalt not give up on dating and become a nun" and "You know full well a vow of celibacy is not the answer"). Bumble has since issued an apology, removed the campaign, and pledged to make donations to organizations like the National Domestic Violence Hotline. Despite a few hiccups, there is plenty to celebrate in our industry: At the 2024 Effie Awards, Molson Coors and McDonald's topped the Most Effective Marketers and Most Effective Brands rankings, respectively. Unilever was named the 2024 Cannes Lions Creative Marketer of the Year. The list of awards goes on (Clio, One Show, ANDY, Ad Age Creativity).

July-August 2024 | Volume 77

The Cannes Lions International Festival of Creativity is the epicenter of the world's best creativity and the home of the world's most prestigious advertising awards. The jurors selected Unilever as the 2024 Creative Marketer of the Year (a title the brand earned in 2010 as well), celebrating a body of iconic, Lion-winning work over a sustained period, as Unilever established a reputation for producing brave, creative, and innovative marketing solutions. AI remains front and center, even at award shows, with mixed results and plenty of roadblocks, including copyright infringement. For example, major record labels, such as Sony Music, Universal Music Group, and Warner Records, sued two AI startups, Suno and Udio, for alleged copyright infringement. As innovation prompts more creative use of technology, more challenges emerge for brands and their agencies to tackle. Important questions remain, no matter the type of innovation: How should we measure the ROI of this? How truly effective is it? Can we measure sizable improvements in performance? Are these benefits scalable? Is my organization ready and best positioned to take full competitive advantage?

September-October 2024 | Volume 78

Did you hear the rumor that is no longer one? Behr Paint's 2025 Color of the Year is a deep ruby red called Rumors (MQ1-15). The paint company leverages surveys, trends in home goods, and global studies to select the color. Now that I have your attention, let's talk about something with greater significance to advertisers: Some recent headlines, such as "General Mills adds three agencies to its creative roster," "Stellantis puts five brands in creative review, including Dodge, Ram and Chrysler," and "Agency rosters on the rise—why marketers are enlisting more shops," indicate that some advertisers are indeed expanding or diversifying their roster of agencies in an effort to have a range of assorted partners to meet their unique, diverse, expanding or specialty needs. Some, like Stellantis, favor shifting assignments between agencies within their roster or challenging their existing roster to avoid complacency. Is that the right strategy? Rest assured that advertisers will continue to test and evolve their agency models to best suit their most pressing organizational reality and needs.

November-December 2024 | Volume 79

The US election fueled tremendous growth in advertising as political ads seemingly ran everywhere in traditional and digital media. If you are like me, your mailbox was constantly filled with flyers promoting candidates. Per Nielsen Media Research, 42.3 million viewers (excluding streaming services such as Amazon Prime's election special) tuned in to watch presidential election night coverage across 18 networks, a sharp 25% decline compared with 2020. Aside from the lower viewership, the 2024 US election cycle saw an unprecedented amount of advertising spend, totaling \$10.5 billion across various races; the presidential campaigns alone accounted for \$3 billion. The record spending is a 10% increase from the 2020 cycle. These figures reflect the intensifying role of media campaigns in political strategy, highlighting a shift toward increasingly high-budget advertising to influence electoral outcomes.





Awards and recognition

- Per Ad Age, the **top 15 fastest-growing brands in 2023** were:
 1. Airbnb
 2. Porsche
 3. Hyundai
 4. Ferrari
 5. Sephora
 6. Adobe
 7. Microsoft
 8. LinkedIn
 9. Red Bull
 10. Sony
 11. Prada
 12. Allianz
 13. BMW
 14. Lego
 15. Zara
- Per Adweek, **the best 2023** ads were:
 1. Barbie/Mattel | “Pink Billboard” (in-house)
 2. McDonald’s | “Grimace’s Birthday” by Wieden+Kennedy New York
 3. Apple Music | “Run This Town”—Super Bowl 2023 (in-house)
 4. Tubi | “Interface Interruption” by Mischief @ No Fixed Address
 5. Channel 4 | “Idents 2023 ” by 4Creative
 6. Ikea | “Proudly Second Best” by David Madrid, Ingo & Ogilvy
 7. Tinder | “It Starts With a Swipe” by Mischief @ No Fixed Address
 8. Canal+ | “The Secret of Wakany” by BETC Paris
 9. Ocean Spray | “Power Your Party” by Orchard
 10. Squarespace | “The Singularity” (in-house)
 11. Levi’s | “Greatest Story Ever Worn” by Droga5 NY
 12. Hilton Hotels | “The Ad You Stay In” by TBWA\Chiat\Day NY
 13. Uber | “Best Friends” by Mother London
 14. Nike | “What the Football” by Wieden+Kennedy Portland, Amsterdam, Shanghai
 15. Harry’s | “Feel Good, Fellas” by The Or
 16. Stella Artois | “The Artois Probability” by Gut Buenos Aires
 17. Meow Wolf | “Come Find Yourself at the Mall” by Preacher
 18. Liquid Death | “F**k Whoever Started This” (in-house)
 19. Steak-umm | “DeepSteaks” by Tombras
 20. Fiat | “Operation No Gray” by Leo Burnett Italia
- Per Ad Age, **the five best marketers of 2023** were:
 1. Mattel (for its Barbie movie and long-tail marketing strategy and activation campaigns)
 2. Taylor Swift (for her Eras Tour ticket sales, which exceeded \$1 billion, making it the highest-grossing concert tour of all time)
 3. Nintendo (for expanding beyond games and into movies and entertainment with The Super Mario Bros. Movie, which generated \$1.36 billion worldwide)
 4. Major League Soccer (for landing a 10-year, \$2.5 billion deal to broadcast all MLS matches through Apple TV and setting up large corporate sponsorship deals)
 5. Olipop (TikTok-famous soda brand challenging beverage giants Pepsi and Coke using social media)
- **Apple** won the 2023 Emmy for Outstanding Commercial for its accessibility-focused campaign called “The Greatest,” created by Apple’s in-house marketing team. The spot previously won the Entertainment Lions for Music Grand Prix at Cannes Lions.
- Per Adweek, **Jack Morton** was awarded 2023 Experiential Agency of the Year, highlighting the following capabilities: using live activations to present purpose, building long-term customer connections, and making experiential mainstream.
- At the 2023 Clío Sports Awards, **Adidas** won four Grand Clíos: two with TBWA\London for “The Official Leak of the World Cup Kits,” one with Johannes Leonardo for “Remember the Why,” and another with TBWA\Hakuhodo for “The Unofficial Launch.” **Anheuser-Busch’s Michelob Ultra** and FCB New York picked up three Grand Clíos for “Dream Caster.”
- MediaPost awarded IPG Mediabrands’ **Kinesso** as the 2023 Media Agency of the Year. Also per MediaPost:
 1. Holding Company of the Year—Omnicom
 2. Independent Agency of the Year—Acadia
 3. Creative Agency of the Year—OpenAI
 4. Search/Performance Marketing Agency of the Year—iProspect
 5. Client of the Year—e.l.f. Beauty
 6. Supplier of the Year—OpenAP
- Per Ad Age’s **2023 Healthcare Marketing Impact Awards**, the following campaigns were awarded:
 1. Village Medical, “The New Way to Well” (Best in Show)
 2. Area 23, “bAlgrapher” and “Lil Sugar” (Best Agency of the Year)
 3. Baylor Scott & White Health, “Dak’s Cleats for a Cause” (Gold—Social Media Campaign of the Year)
 4. Ophelia Health, “F*ck Rehab Campaign”
 5. Nurofen, “See My Pain: The Gender Pain Gap” and The Pink Fund, “The Other Part of the Fight” (Gold—Purpose-Led Campaign of the Year)
 6. Centura Health, “I Am”
 7. Quest Diagnostics, “Put your_____ to the test” and Hip Hop Public Health, “Lil Sugar—Master of Disguise” (Gold—Integrated Campaign of the Year)
 8. Village Medical, “The New Way to Well” and Conformis, “Two Knees” (Gold—Film/TV/Video Campaign of the Year)
 9. Northwell Health, “The Well” and Enterogermina/ Sanofi, “Ready Player Mom” (Gold—Digital Campaign of the Year)
 10. Bayer, “Driving Creative Effectiveness at Scale” (Gold—Creative Data Campaign of the Year)
- **Havas** realized 669 total wins in 2023 across the Havas Creative Network (including BMW, Pfizer, Ikea, Danone, Sanofi, Lidl, Hilton, and Santander) and received more than 500 industry awards across the Havas Creative Network (including Effie Awards, Anthem Awards, Clío Awards, Cannes Lions, WARC Rankings, The Drum Awards, and LIA).



- 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 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.

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- 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. Homes.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: Droga)
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.



- Per Forrester, **Publicis, WPP, Omnicom, and Accenture** are leaders in commerce. So-called “strong performers” included Dentsu’s Merkle, Interpublic, and IBM. “Contenders” included Capgemini, Dept, and Valtech. The Paris-based holding company Publicis acquired commerce platforms like Profitero and CitrusAd, which it has integrated into its retail media platform, a key asset for commerce operations. Omnicom acquired Flywheel Digital, a specialist in digital commerce and retail solutions, supported by its strong Omni platform.
- CPG giant **Unilever** was named the 2024 winner of the Cannes Lions Creative Marketer of the Year award. The firm has won Lions over the years for campaigns for brands such as Dove, Hellmann’s, Magnum, Vaseline, Marmite, and Pot Noodle. Dove has been Unilever’s most consistent honoree at the Cannes Lions International Festival of Creativity.
- Per the **ADC 103rd Annual Awards**, McCann New York’s “ADLaM” project for Microsoft won the ADC Black Cube for Best of Show. The work also won the ADC Designism Cube for the entry that best encourages positive societal and political change and won two Gold Cubes.
 - Agency of the Year: FCB New York
 - Boutique Agency of the Year: Banana Balloon Shenzhen
 - Brand-Side Agency of the Year: Google Brand Studio San Francisco
 - Network of the Year: FCB Global
 - Production Company of the Year: Helo West Hollywood
 - Brand of the Year: AB InBev, Michelob Ultra
- Per **The One Show 2024**, top winners were:
 - Agency of the Year: FCB New York
 - Independent Agency of the Year: Rethink Toronto
 - Network of the Year: FCB
 - Brand-Side/In-House Agency of the Year: Apple Marcom Cupertino
 - Design Firm of the Year: King Henry Studios London
 - Holding Company of the Year: Interpublic Group
 - Production Company of the Year: Helo West Hollywood
 - Client of the Year: AB InBev
 - Brand of the Year: Michelob Ultra
- Per **Ad Age 2024 Creativity Awards**, top winners included:
 - Ikea “Proudly Second Best” (Campaign of the Year)
 - UN Global Compact x B3 “EART4” (Best B2B Campaign)
 - Michelob Ultra “Dreamcaster” (Best Use of AI)
 - Activision’s Call of Duty “Loot for Good” (Best Work for Good)
 - Noblex “El Gerente” (Branded Entertainment/Content Campaign of the Year)
 - Stella Artois “The Artois Probability” (Creative Data Campaign of the Year)
 - Apple “Huracán Ramírez vs. La Piñata Enchilada” (Craft of the Year)
 - Chick-fil-A “The Brake Room” (Experiential Campaign of the Year)
 - Adidas “The Original Impossible” (Film/TV/Video of the Year)
 - Ikea “Proudly Second Best” (Print/Design/Out-of-Home Work of the Year)
 - Hilton “The Ad You Stay In” (Social Campaign of the Year)
 - Honest Eggs Co. “FitChix” (Tech Innovation of the Year)
 - Blockbuster “‘Til the Bitter End” (Tiny But Mighty)
 - State Farm “The Big Game Came to Us!” (Best Use of TikTok)
 - Duolingo (Brand of the Year)
 - Eos “Skin So Soft Even Soft Things Think You’re Soft” (Best ROI: Work That Works)
 - Verizon x The Metropolitan Museum of Art “The Met Replica” (Best Partnership/Collaboration)
 - Pepsi (Best Rebrand)
 - McDonald’s “Grimace Shake” (Best Brand/Product Launch)
 - State Farm (Best Brand Social Media Presence)
- **2024 Gold Effie winners** included:
 - Campbell Soup Company/Campbell’s Condensed Soup, Leo Burnett Chicago and MSL Group for “Move Over Turkey, Campbell’s Celebrates and Owns Sides Season,” with Spark Foundry and The Mars Agency
 - Foundation to Combat Antisemitism, VML, and Mindshare for “The Blue Square: Standing Up to Jewish Hate”
 - McDonald’s and Wieden+Kennedy NY for “The Cactus Plant Flea Market Box” with Starcom, Narrative Media Group, The Marketing Store and Boxer
 - Microsoft and McCann New York for “ADLaM: An Alphabet to Preserve a Culture,” with NAFFA, Jamra Patel, Andrew Footit Design, and Craft
 - Mondelēz International/Oreo and VML for “Oreo Codes”
 - Progressive Insurance and Arnold Worldwide for “Superstore”
 - Tinder and Mischief @ No Fixed Address for “Brand”
 - US Navy/America’s Navy and VML for “A Peek into the Real Navy”
- Per the **2024 Effie rankings**:
 - Most Effective Marketers:
 1. Molson Coors
 2. McDonald’s
 3. Fox Corporation, Kraft Heinz Company (tie)
 - Most Effective Agency Networks:
 1. McCann Worldgroup
 2. VML
 3. Ogilvy
 - Most Effective Brands:
 1. McDonald’s
 2. Tubi
 3. Tinder
 - Most Effective Agency Offices:
 1. Mischief @ No Fixed Address
 2. Ogilvy New York
 3. McCann New York
 - Most Effective Holding Companies:
 1. Interpublic Group
 2. WPP
 3. Publicis Groupe
 - Most Effective Independent Agencies:
 1. Mischief @ No Fixed Address
 2. Wieden+Kennedy
 3. Gut



- **Grey** was honored with four Golds for Pringles’ “Mr. P,” LALCEC’s “Let’s Change the Story,” Makro’s “Life Extending Stickers,” and American Society of Clinical Oncology’s “The Most Beautiful Sound,” representing Grey New York, Argentina, and Colombia studios.
- **2024 Grand Clio Winners included:**
 - Publicis Conseil (Agency of the Year)
 - Michelob Ultra (Advertiser of the Year)
 - Rethink Canada (Independent Agency of the Year)
 - Ogilvy (Network of the Year)
 - Prodigious Paris (Production Company of the Year). Key wins: “Barbie the Movie” by Mattel for Barbie (Integrated: Product/Service)
 - “Pop Tarts: The First Edible Mascot” by Weber Shandwick for Kellanova (Experience/Activation: Public Service)
 - “ADLaM” by McCann New York for Microsoft (Design Craft: Product/Service)
 - “WoMen’s football” by Marcel for Orange (Branded Entertainment & Content: Product/Service)
 - “Where to Settle” by McCann Poland & McCann New York for Mastercard (Direct: Product/Service)
- The 60th edition of the **International ANDY Awards 2024** winners included:
 - Rethink (Independent Agency of the Year)
 - Interpublic Group (Holding Company of the Year)
 - McCann (Network of the Year)
 - Apple (Brand of the Year)
 - Orchard Creative (Best New Agency)
 - Park Pictures (Production Company of the Year)
 - Google (Best In-House of the Year)
 - Best in Show winners included: “WoMen’s Football for Orange” by Marcel, “ADLaM” for Microsoft by McCann New York & Craft New York, “Play It Safe” for Sydney Opera House by The Monkeys (part of Accenture Song), “Ready to Vote” for Solar Impulse by Publicis Conseil, “We Didn’t Write This Campaign” for NotCo/NotMilk” by MRM Chile
- Publicis Conseil (Paris) was named **Agency of the Year at the Cannes Lions International Festival of Creativity** (after being runner-up in 2023), followed by Rethink (Toronto) and Ogilvy (NYC). Publicis Conseil received 2 Grand Prix and 16 Lions. Rethink was named Independent Agency of the Year, followed by Edelman (London) and Klick Health (Toronto). Ogilvy was honored as Network of the Year (75 Lions strong, including 4 Grand Prix, 1 Titanium, 11 Gold, 16 Silver, and 43 Bronze), followed by Publicis Worldwide and DDB Worldwide. WPP was named Creative Company of the Year, followed by Omnicom and Interpublic Group. Smuggler (US) received the Palme d’Or as the best production company. Creative Brand of the Year was received by Coca-Cola, followed by Heineken and Apple.
- Omnicom’s OMD was named **2024 Cannes Lions Media Network of the Year**, followed by sibling agency PHD and Germany’s Mediaplus, Europe’s largest independent media network. Grand Prix in Media was awarded to agency Gut São Paulo for a Black Friday promotion created for Brazilian e-commerce giant Mercado Libre. OMD won two Grand Prix outside the media category, including the Social/Influencer award for the “Michael CeraVe” campaign led by Ogilvy PR. OMD was also listed as the media agency for the Grand Prix in Creative Business Transformation campaign for Philips (“Better Than New”).
- **Havas** brought home 25 Lions from the 2024 Cannes Lions International Festival of Creativity, won across 12 agencies, including 3 Gold, 10 Silver, and 12 Bronze, thanks to the contribution of Havas Paris, BETC Paris, Havas Germany, Havas Costa Rica, Arnold Boston, BETC Havas Brazil, and Havas Republica.
- **Accenture Song** did quite well at the 2024 Cannes Lions International Festival of Creativity, with the following wins: Sydney Opera House: “Play It Safe” won the Grand Prix for Film | Culture & Context: Local Brand; Silver for Film Craft | Production: Use of Original Music; Silver for Entertainment | Challenges & Breakthroughs: Social Behavior & Cultural Insight; and Bronze for Film | Online Film: Travel, Leisure, Retail, Restaurants & Fast Food Chains. General Entertainment Authority: “Rumble” won silver for Film | TV/Cinema Film: Media/Entertainment, and bronze for both Film Craft | Production: Production Design/Art Direction, and Film Craft | Production: Use of Licensed/Adapted Music. Copenhagen Metro: “Whoops” won bronze for Film | Online Film: Travel, Leisure, Retail, Restaurants & Fast Food Chains.
- Modern Healthcare and Ad Age’s **2024 Healthcare Marketing Impact Awards**, which recognize the most creative and effective campaigns for the healthcare industry, include the following categories: Branded Entertainment/Content Campaign of the Year, Creative Data Campaign of the Year, Digital Campaign of the Year, Film/TV/Video of the Year, Integrated Campaign of the Year, Print/Out-of-Home Work of the Year, Purpose-Led Campaign of the Year, Social Media Campaign of the Year, Tiny But Mighty, Best in Show, and Agency of the Year.
- Per **Effie’s Worldwide Index**, the most effective agency holding group was Omnicom, followed by WPP, Publicis, Interpublic Group (IPG), and Dentsu. Omnicom’s lead position resulted from the strong global performances from DDB, BBDO, PHD, OMD, and TBWA offices, among others. The most effective agency network IPG’s McCann Worldgroup, followed by DDB Worldwide, Ogilvy, BBDO Worldwide, and Leo Burnett Worldwide. The most effective agency offices were: AlmapBBDO (São Paulo), followed by Leo Burnett Dubai (UAE), McCann Worldgroup Gurugram (India), GUT (Buenos Aires), and Leo Burnett India (Mumbai).
- Per **Effie Awards**, the most effective marketers in 2023 (in ranking order): AB InBev, Unilever, McDonald’s, PepsiCo, The Coca-Cola Company, Mondelēz International, Procter & Gamble, YUM!, Nestlé, Netflix, Heineken, Reckitt Benckiser, UNITED24, Newsan, Kimberly-Clark, Mercado Libre, Telefónica Group, Delivery Hero, Vodafone, SAIC GM, Mastercard, Samsung, Burger King, Volkswagen, Landmark Group.



- **Top 5 Grand Prix winners at Cannes Lions International Festival of Creativity:** Orange: “WoMen’s Football” (Agency: Marcel Paris); DoorDash: “DoorDash All the Ads” (Agency: Wieden+Kennedy Portland); Xbox: “The Everyday Tactician” (Agency: McCann London); CeraVe: “Michael CeraVe” (Agency: Ogilvy); Spotify: “Spreadbeats” (Agency: FCB New York).
- Rethink Toronto’s Heinz Ketchup work won the **Creative Effectiveness Grand Prix at the Cannes Lions International Festival of Creativity** as part of yearlong marketing effort called “It Has to be Heinz” and several campaigns, including “Draw Ketchup,” “Ketchup AI,” and “Ketchup Fraud.”
- Per the **Cascadia awards**, top wins by Portland, Oregon-based agency Opinionated included:
 - Best big budget single, Gold: Adidas – “The Original Impossible”
Silver: “Miro Monster Problem”
 - Best big budget campaign, Gold / Best in Category: Hinge – “Hinge My Dudes”
 - Best big budget campaign, Silver: Drumstick – “Drumstick Long Form”Other wins included:
 - Best experiential campaign/consumer activation gold / Best in Category
 - Best experiential campaign/consumer activation silver and best purpose-led creativity gold
 - Opinionated was 2022 Ad Age Small Agency of the Year
- Per Ad Age and its 16th annual **Small Agency Awards**, winners were:
 - Erich & Kallman (Gold) and Majority (Silver)
 - Gus (Gold – 1-10 Employees) and Ranaverse (Silver – 1-10 Employees)
 - Quality Meats (Gold – 11-75 Employees) and Callen (Silver – 11-75 Employees)
 - Laughlin Constable (Gold – 76-150 Employees) and Madwell (Silver – 76-150 Employees)
 - Mojo Supermarket (Gold – Northeast) and Slap Global (Silver – Northeast)
 - Opinionated (Gold – Northwest) and Drake Cooper (Silver – Northwest)
 - Curiosity (Gold – Midwest) and Lafayette American (Silver – Midwest)
 - Superconductor (Gold – West) and Hyphenated (Silver – West)
 - Preacher (Gold – Southwest) and Bakery (Silver – Southwest)
 - Six Degrees Creative (Gold – Southeast) and Cornett (Silver – Southeast)
 - Angry Butterfly (Gold – International) and Courage (Silver – International)
 - Avalon Consulting (Gold – Data & Insights) and DCX Growth Accelerator (Silver – Data & Insights)
 - Colossus (Gold – Design) and Design B&B (Silver – Design)
 - Civic Entertainment (Gold – Experiential) and XD Agency (Silver – Experiential)
 - Exverus (Gold – Media) and SwellShar and (Silver – Media)
 - DiGennaro Communications (Gold – PR) and Boden (Silver – PR)
 - Newcomers: Loop (Gold) and Flower Shop (Silver)

- Interbrand released its **Best Global Brands 2024**. The top 10 spots:
 1. Apple (\$489B brand value)
 2. Microsoft (\$352B)
 3. Amazon (\$298B)
 4. Google (\$291B)
 5. Samsung (\$101B)
 6. Toyota (\$73B)
 7. Coca-Cola (\$61B)
 8. Mercedes-Benz (\$59B)
 9. McDonald’s (\$53B)
 10. BMW (\$52B)Fastest 2024 risers: Ferrari, YouTube, Hermès Paris, KN, Instagram, Prada, Sephora, Visa, Hyundai, Allianz, Toyota, Adobe, Google, Spotify, GE.



The key to creativity is two things: embracing diverse perspectives and channeling an innovative spirit.”

Andrea Zaretsky, CMO,
Morgan Stanley Wealth Management

Morgan Stanley

- Circus Grey received **London International Awards’** Global Design Company of the Year, South America Regional Design Company, and Agency of the Year. Grey was also honored as South America Regional Network of the Year. Serviceplan Group was named Global Independent Network of the Year for the fourth consecutive year, with 11 Gold, 12 Silver, and 10 Bronze statues—plus recognition as Regional Independent Network of the Year for Europe and Regional Independent Agency of the Year for Europe for Serviceplan Germany, Hamburg. CeraVe was honored as LIA Global Client of the Year, with three Grand LIAs, nine Gold, one Silver, and two Bronze (for their work with Ogilvy PR, New York). TBWA\Health Collective was recognized as Global Health & Pharma Agency of the Year and the Regional Health & Pharma Agency for North America.
- The **Drum Awards for Advertising 2024** winners include VML UK for NHS Blood & Transplant (Gold Creative Innovation); David for Google and Android (Gold Creative Transformation); FCB Chicago for Dramamine (Creative Humor); FCB Chicago for Dramamine & LePub for Heineken (Gold Integrated Campaigns); Salesforce & Sips and Bites for Doritos/PepsiCo (Gold Use of Gen AI). FCB Chicago took the Grand Prix for its work with Dramamine, while David Madrid received the President’s Award for its work with JCDecaux.



- Per Adweek, **the fastest-growing agencies of 2024:**
 1. Creative Currency (Full service – Canada)
 2. Salient (Full service – USA)
 3. Saylor (Digital – USA)
 4. LeadOrigin (Digital – USA)
 5. Six Degrees Creative (Full service creative – USA)
 6. Acadia (Full service digital – USA)
 7. Idlewild Experiential (Experiential – US)
 8. Majority (Full service – USA)
 9. Pixl Group (Full service – United Arab Emirates)
 10. SuperHeroes (Full service – USA)

Adweek ranks the fastest-growing agencies based on the criteria top large, top medium, top minority-led, top Midwest, and top women-led agencies.



Creativity and noteworthy work

- **Burger King Brazil** launched a bold and humorous interactive experience for the December holidays called “Hangover Whopper” with its agency DM9. It uses facial recognition to provide coupons based on how hungover consumers are.
- Independent New York-based agency **Anchor Worldwide** launched a set of humorously imaginative “Admojis”—50 emojis designed for agency executives to convey messages on a diverse range of topics and phrases such as “Does it have legs?” or “What will the client think?”
- 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.

- Tech giant **Samsung** responded to Apple’s controversial “Crush!” commercial for the iPad Pro with an ad of its own stating “Creativity cannot be crushed,” created by BBH USA. The ad shows a woman walking into what looks like the scene of the Apple spot (with destroyed objects everywhere) and picking up a damaged guitar to play.
- **Cannes Lions International Festival of Creativity** reported receiving 26,753 submissions for its 2024 awards, up 6% YOY including relatively new categories such as Creative Business Transformation, Social and Influencer, Creative Commerce, and Creative Strategy.
- Per COMvergence, Omnicom’s OMD repeated as the **top-billing media agency** in the US in 2023 with a total of \$9.6 billion (+4.6%). At the group level, Publicis Media led with \$23.9 billion, up 9.6% YOY.
- **Fred & Farid Los Angeles** launched a campaign titled “Love Your Rare” for Rare Beauty, the makeup brand founded by Selena Gomez. The partnership is with the brand’s internal creative team. This is the brand’s first global brand campaign and is narrated by Gomez herself, with a spot called “Every Side of You,” about loving imperfections in the quest for self-confidence.

Industry stats, trends, and projections

- Per Dan Eisenberg, CMO of Blue Chip, brands should implement **30-day RFPs**:
 1. Investigate up front
 2. Chemistry first
 3. Keep briefs brief
 4. Reduce spec work
 5. Get granular on scope
- Per The Martin Agency, **humor** makes up only 10% of ads today and yet accounts for more than 50% of the most effective ads. 91% of consumers prefer brands to be funny, and 72% say that compared to the competition, they’d choose a brand that makes them laugh.
- 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 mandatories, 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
- 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.
- 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
- Per PWC, **what's important to CMOs in 2024**:
 1. Fine-tune your tech to unlock value
 2. Embrace your role as growth catalyst
 3. Drive outcomes with trust
 4. Unlock loyalty with personalization
- Per a joint **Aprais and WARC study** in 2023 that looked at how the strength of relationships between marketer and agency correlated with effective work, 68.1% of the awarded agencies were above the average score. Teams that won effectiveness awards are stronger, on average, both when clients score their agencies and when agencies score their clients. Three key areas where these effectiveness award-winning relationships excel: trust (the team can be relied on to deliver and behaves with integrity), challenge (uses initiative to challenge the status quo and does not allow conflict to go unaddressed), and strategy (discipline for which winning teams show the biggest increase in score compared with average relationship scores).
- Per ANA and TAG TrustNet, which released early findings from their first quarterly **Programmatic Transparency Benchmark Study**, the percentage of media dollars spent on made-for-advertising websites dropped from 15% to 4%, and the average number of websites and apps on which campaigns run dropped from 44,000 to 23,000.
- Per Linda Bethea, CMO of Danone US, the **four C's to succeed as a marketing leader** are:
 1. Curiosity (being insanely curious about the consumer and about the evolving landscape)
 2. Compassion (compassion for your team, the people you work with, and for the consumer)
 3. Courage (take bold risks, even without data and information)
 4. Conviction (have the conviction to convince others about your decisions)
- Per Deepthi Prakash, president, international/chief product officer, TBWA Worldwide, **four conflicting ideologies hindering the pitch process** are:
 1. We want only people who will work on our business to pitch and present
 2. Category expertise is required, but no conflicts are allowed
 3. We're really excited to get to know you better, but we can't speak with you directly
 4. We want AI to make your work as efficient as possible, but without the risks
- Per Sarah Mehler, founder and CEO of Left Field Labs, **five principles to guide the evolution of agency-client dynamics**:
 1. Ambidexterity: bridging vision and execution
 2. Culture of learning: fostering innovation through inclusion
 3. Work inside and out: embedding for success
 4. Specialty matters: honing expertise in a rapidly changing landscape
 5. Humanity at the core: prioritizing authentic, human-centric work

Business and digital transformation

- **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.
- 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.
- **YouTube** used Google AI to review 8,000 ads globally. The top performers: Google Pixel’s Super Bowl spot, “Javier in Frame,” Tissot’s “Off the Cuff,” and “The Haters Upset Axe vs Tom Ford.” Common shared characteristics among winners: ads that open with a strong hook, lean into pop culture references and trends, use popular or catchy music tracks, and engage audiences with humor.
- **Google** partnered with independent agency **Tombras** on behalf of **PODS** to generate 6,000 different hyperlocal ads displayed on PODS vehicles in a campaign called “Impossibly Smart Billboard.” Using Google’s Gemini AI tool (Gemini 1.5 Pro with Google Cloud Vertex AI), the agency produced a copy for every neighborhood in New York based on location, weather, traffic data, and time. PODS reported a 51% lift in search volume YOY in NYC.
- Per the ProcureCon London conference, what is your team’s biggest challenge in supporting **marketing’s digital transformation** projects? Top 3 answers:
 1. Measuring the effectiveness and ROI of digital initiatives (32%)
 2. Aligning procurement and marketing goals (24%)
 3. Ensuring sufficient budget and resources (17%)
- **Haleon** and its toothpaste brand Sensodyne adopted a digital “Content Credentials” watermarking technology, the Coalition for Content Provenance and Authenticity (C2PA) technology, to prevent the spread of misinformation and to authenticate that dentists (not paid actors) and research-based claims in its ads are real.
- Per Chief Martec, 71% of martech and marketing operations professionals integrated a **data warehouse/data lake** with their martech stack. 69% with those integrations have them working bidirectionally (APIs), sending data both ways between the warehouse/lake and their martech apps.
- Per eMarketer predictions, **digital** will make up 63.7% of the 12 hours and 37 minutes per day US adults spend with total media in 2024. Time spent with mobile will hit 4 hours per day among US adults, making it the most popular media access point. Time spent with connected TV (CTV) will grow by 8.3% this year to reach 2 hours and 15 minutes a day, still trailing traditional TV (2 hours and 55 minutes a day). Adults will average 6 hours and 45 minutes per day watching video in 2024.

Other/miscellaneous

- **KMPG** released its annual Customer Experience Excellence Report, titled “The great balancing act,” which advocates for creating differentiated CX with human and AI interactions, providing practical advice for companies that want to orchestrate outstanding customer experiences with both empathy and automation.
- **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.
- The ANA published resources related to a key topic: “**How to Write Successful Creative Briefs: What makes for a great creative brief, and how do I write one?**” The resources consist of best practices for creative briefs and tools and templates (e.g., Creative Brief Template, ANA/Demand Metric, Creative Brief Assessment Tool, Marketing Campaign Plan Template, Smart Insights), examples from Dell, American Express, Diageo, and La Quinta Inns and Suites, and webinars and ANA training courses.
- Retailer **Toys R Us’s** use of AI-generated technology, OpenAI’s SORA, in a recent 60-second brand film and teaser produced by Toys R Us Studios and agency Native Foreign, sparked backlash in the creative community. Critics alleged that the brand used an AI tool that was trained on the plagiarized work of thousands of artists and unlicensed intellectual property instead of hiring real creators and actors, and produced content that is of low quality, as well.
- Per The TEAM Companies and Lakehouse Partners, several models have been developed in response to marketers’ efforts to regain some control over the **content creation process** and handling the unintended consequences of decoupling:
 1. A return to a version of the AOR for production
 2. The rise of the in-house agency
 3. A marketer-led center of excellence focused on unified global production and asset management
- The **US election** indicated a shift in tactics to promote candidates, from traditional paid media to alternative media channels such as podcasts, Twitch, and influencer networks like Snapchat and Facebook. The objective was to find new, innovative ways to reach voters, especially young ones. For example, according to Newsweek, Trump’s appearance on Joe Rogan’s podcast—three hours of unscripted conversation—produced more than 26 million views in 24 hours.
- Toy maker **Mattel** apologized for listing a porn site on its Wicked toy packaging as a film adaptation of the Broadway hit mistakenly directed consumers to an X-rated website. Mattel referred to the incident as a misprint.



Noteworthy quotes

- » “The added weight of offboarding an incumbent and onboarding a new agency can mean that a brand won’t benefit from new ideas and optimal agency support for six to nine months.”
—Dan Eisenberg, CMO, **Blue Chip**
- » “Winning back is not as easy as winning over. Reconsideration relies on a client being truly restless around (self) reflection and improvement.” —Melanie Norris, Managing Director and Head of Planning, **BBDO Worldwide**
- » “The more we say ‘AI,’ the more it resonates with our customers and the more it will be adopted.” —Franklin Peitz, Tech and Innovation PR Manager, **John Deere**
- » “The agency world has lost its joy. After 3 decades in the industry, for me it’s personal. It’s time to bring it back.” —Warren Marengo Chase, VP, Managing Director Copper Giants In-House Agency, **Liberty Mutual Insurance**
- » “AI can be applied to solve the problem that AI is generating, building content QA systems that automatically check content for everything from digital suitability to brand consistency and more to ensure that even the ads the robots make for you are aligned to your brand and your existing creative learnings.” —Anastasia Leng, CEO and Founder, **CreativeX**
- » “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**
- » “As AI-fueled content and experiences become more commonplace, the most effective customerfacing 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**
- » “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**
- » “For the first time in marketing history, the creative is the variable in creating reach, which is profound. TikTok changed everything.”
—Gary Vaynerchuk, Chairman, VaynerX, and CEO, **VaynerMedia**
- » “True artists, makers and creators know that creativity always finds a way.” —Estefanio Holtz, Executive Creative Director, **BBH USA**
- » “The feedback on the work is the only valuable currency we can have access to. It’s a way to learn, to improve, to better understand what made the needle move in one direction or another. With no feedback it’s a blind drive.” —Andrea Stillacci, Founder and President, **Herezie**
- » “By being very collaborative, and workshopping the brief with our clients, they’re already primed to want to see the ideas that come out of this brief because they’ve been part of the process.” —Kevin Mulroy, Partner and Executive Creative Director, **Mischief @ No Fixed Address**
- » “Agencies shine when they can present a strong, united dynamic where everyone is informed, entrenched and hands-on with the work.” —Tonya Martin, Co-CEO and Director of Project Management, **Baldwin&**
- » “While AI is creating efficiencies and new ways of working, nothing will replace the power of human creativity.” —Marla Kaplowitz, President and CEO, **4A’s**
- » “Proper feedback is an important element of our daily personal lives, and it should not be dismissed when it comes to this kind of work. Feedback matters.” —Andrea Stillacci, Founder and President, **Herezie**
- » “Not all creativity...is worth preserving.” —David Droga, CEO, **Accenture Song**
- » “A brand is like a frame...it changes how we understand the things in front of us.” —Nir Wegrzyn, CEO and Founder, **BrandOpus**
- » “AI doesn’t power creativity; it empowers creative people.”
—Amir Sahba, CEO and Founder, **Thinkingbox**
- » “I would love to see fewer brands that aren’t ready for the change required within a pitch and more who are brave and want to be change agents.” —Darla Price, President, **Ogilvy New York**



- » “For long-term strategic benefits, it’s more critical than ever for agencies to demonstrate value consistently beyond cost. Clients would be well-advised to evaluate potential partners not only based on immediate costs but also on their perceived ability to deliver sustained value.” —Matt Kasindorf, SVP, Business Intelligence and Insight, **4A’s**
- » “Despite its acknowledged importance, only 10 percent of agencies and 5 percent of clients have a formal, corporate-backed definition of value. This lack of a standardized definition complicates the measurement and assessment of value within the industry.” —Greg Wright, Senior VP, Brand and Media, **ANA**
- » “The power of AI is unlocking a whole new palette of expression for our creative teams, allowing them to bridge to simulations, visualizations and hybrid realities in everything from video content to gaming, physical/digital activations and other forms of marketing activity.” —Philippe Krakowsky, CEO, **Interpublic Group**
- » “While direct collaboration between production companies and clients offers numerous benefits, it requires a significant shift in how production companies operate. They must be prepared to take on more responsibility, develop strategic insights, and build strong, direct relationships with clients to succeed in this evolving landscape.” —Mike Palmer, Chief Growth Officer, **Nice Shoes**
- » “It would be refreshing to see agencies and holding companies stop trying to out-process each other, but instead focus on building cultures and environments that nurture transformative creative breakthroughs.” —Tomas Gonsorcik, Global Chief Strategy Officer, **DDB Worldwide**
- » “When we laugh, when our barriers are brought down by an unexpected twist or a surprising human connection, we are more able to feel.” —Javier Campopiano, Global Chief Creative Officer, **McCann Worldgroup**
- » “Ads can be produced in hours rather than days or weeks. That’s a two-edged sword because the industry sells time.” —Martin Sorrell, Executive Chairman, **S4 Capital**
- » “Great agencies are made by brave clients and passionate people who relentlessly pursue creative ideas that change the world and solve big business problems. It takes trust, collaboration, and partnership.” —Liz Taylor, Global Chief Creative Officer, **Ogilvy**
- » “Sometimes we combine internal and external teams and have them work together within a semi-pitch. It’s a way to ensure that we’re not getting complacent and too internally oriented.” —Julia Goldin, Global Chief Product and Marketing Officer, **Lego Group**
- » “The takeout is that AI is not here to do what we were doing differently, but to empower us to do something that we simply couldn’t do before.” —Marco Venturelli, Chief Creative Officer, Publicis Groupe France, and CEO/CCO, **Publicis Conseil France**
- » “We need more briefs focused on business problems and growth opportunities and fewer briefs focused on a predetermined, tactical media plan.” —Michael Chapman, Chief Client Officer, **The Martin Agency**
- » “We firmly see AI and technology as tools to amplify the talents of our amazing people, enhancing their work, not replacing it.” —Hiroshi Igarashi, CEO, **Dentsu**
- » “There’s all these wonderful facets of creativity that can’t be outsourced. But if you have tools that allow you to think faster, and see things differently, and get things out, create things and shape things, I think that’s a great thing.” —David Droga, CEO, **Accenture Song**
- » “We are a network of unrivaled creative talent, but that talent gets to live their wildest creative dreams because of big, bold clients.” —Liz Taylor, Global Chief Creative Officer, **Ogilvy**
- » “Know who you are: Authenticity matters. Know your voice, what you stand for, and stick with it.” —Lorraine Twohill, CMO, **Google**
- » “You must put in the work to communicate. Make time to talk about things outside of the task in front of you—team chemistry, burnout, leadership, the quality of the briefs, etc. These are the conversations that build understanding and trust.” —Joe Prota, Global Director of Brand Marketing, **IBM**
- » “Measure what you treasure.” —Linda Bethea, CMO, **Danone US**
- » “Moving so quickly can make it hard to find the time. But talking about the health of the relationship will pay dividends when the inevitable hardship pops up and allow client and agency to work as partners to find a solution.” —Joe Prota, Global Director of Brand Marketing, **IBM**
- » “Not every brief looks efficient on paper, but if you invest the time now, you’ll enjoy the payoff later.” —Ryan Michlitsch, Executive Creative Director, **Hook**
- » “In healthy relationships, each side gives and takes happily. There’s a vested interest in each other’s success.” —Gregg Lipman, Founder and Partner, **CBX**
- » “Disruptive creativity is what will help us all get to breakthrough work, and AI is a vital enabler of getting us to the very best creative ideas.” —Deepthi Prakash, President, International/Chief Product Officer, **TBWA Worldwide**
- » “Poor scoping and handoffs go hand-in-hand and are the most costly challenges that every agency faces, driving margins down, along with everyone’s happiness.” —Jack Skeels, CEO, **AgencyAgile**
- » “Creative excellence comes down to three things: people, process and passion.” —Rob Reilly, Chief Creative Officer, **WPP**



- » “In a world dominated by data, analysis and human creativity have become all the more valuable.” —Mark Penn, CEO, **Stagwell**
- » “If a marketer thinks of themselves as the only person who’s in charge of the brand, that’s going to be an issue from day one.” —Jessica Padula, VP Marketing and Head of Sustainability, **Nestlé Nespresso SA**
- » “The value equation needs to be aligned with the goal of the relationship.” —Greg Wright, Senior VP, Brand and Media, **ANA**
- » “Authenticity remains a unique differentiator: staying true to each agency’s identity aligns well with diverse client aspirations.” —Philippe Paget, Editor in Chief, **Adforum**
- » “When you unlock the power of subject matter experts, you allow the best ideas to flow forward and create campaigns that are more innovative.” —Diana Haussling, SVP and GM of Consumer Experience and Growth, **Colgate-Palmolive**
- » “We used to think of the competitive environment as one of punctuated equilibrium, where there were long periods of stability between disruptions. Now the disruptions are coming closer and closer together. The competitive environment is in perpetual motion...” —Rita McGrath, Strategy Professor, **Columbia Business School**
- » “Leadership has never been more important than today. All marketers are leaders. We must become lighthouses and beacons to help associates, customers and consumers, and communities navigate and thrive.” —Antonio Lucio, Chief Marketing and Corporate Affairs Officer, **HP**
- » “Our job is to deeply understand who we serve— and what matters to them in their everyday lives.” —Marc Pritchard, Chief Brand Officer, **Procter & Gamble**
- » “The coveted Agency of Record designation, once the holy grail for agencies and consultancies, is increasingly viewed as an outdated relic.” —Sarah Mehler, Founder and CEO, **Left Field Labs**
- » “Agencies can use data as a guide, not a rulebook. At the end of the day, data should support creative ideas, not limit them.” —Holly Willis, CEO and Founder, **Magic Camp**
- » “The reimagined AOR model isn’t about a fundamental shift in skill sets. Rather, it’s an acceleration and evolution of AOR’s capabilities, underscored by a thoughtful and human approach to work and collaboration.” —Sarah Mehler, Founder and CEO, **Left Field Labs**

- » “[Agencies] must understand the client’s world and continue to produce work a little bit faster, a little more on-brand right away. They shouldn’t nickel-and-dime clients to help their own balance sheet. It’s about finding a way to charge for the output and not the sausagemaking.” —Stephanie McCarty, Chief Marketing and Communications Officer, **Taylor Morrison**
- » “You have to take risks. Everyone has a great idea inside of them. Step up, build a case for it, and test it.” —Remi Kent, Chief Marketing Officer, **Progressive Insurance**
- » “Set out to write a brilliant brief, not a short one. While a brief won’t be brilliant if it contains anything superfluous, it won’t be brilliant if it leaves out anything essential.” —Casey Jones, Founder, **BriefLogic**
- » “People are imperfect. Brands that embrace that imperfection and find beauty in it are able to go beyond [the norm] and get to that brand love. Imperfection wins you attention.” —Diana Haussling, SVP and GM of Consumer Experience and Growth, **Colgate-Palmolive**
- » “Everyday moments are filled with potential. Find the moments that matter.” —Marc Pritchard, Chief Brand Officer, **Procter & Gamble**
- » “Marketing is an art and a science. You can’t rely only on data or only on creativity—you need both to truly connect with your customer and culture.” —Kate Kenner Archibald, CMO, **Dash Hudson**

Looking for more?

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Agency	Category	Description
Formative	ADVERTISING	Services range from executive brand and communication, influence programs, personal brand management to brand strategy, content and production, digital experiences and program design (organizational design, content strategy)
Gut	ADVERTISING	Services include brand audit, brand positioning, measurement, content strategy, marketing, loyalty programs, lead-generating, and content strategy and measurement (brand positioning and architecture, content strategy, insight strategy, content platform, selection and production (core creative sets, PR, content creation, digital production))
Moon Rabbit	ADVERTISING	The agency specializes in marketing, brand strategy, creative experiences based on performance, digital, creative and content, marketing, media, operations, video, advertising, influence and design services
Oliver	CREATIVE	The agency specializes in organization transformation, performance marketing, multi-channel marketing and social, integrated performance, in-commerce, on-reaction, experience planning and UX design, marketing, digital products, and B2B
Path	AI / CREATIVE	Services include advertising, behavioral science, experience design, data, digital, innovation, content and content, gaming, production, media, PR and customer engagement
Feed & Feed	MULTIMEDIA / CREATIVE	They offer creative consulting, brand strategy, visual identity, content creation and social/digital activation
HighFive Advertising	PERFORMANCE / CREATIVE	The capabilities include strategy, film, print, tv, radio, design, video, mobile, digital and more
North Performance Intelligence	CONSUMER / CREATIVE	The firm works with large global agency networks and headquarters across the marketing services spectrum, including advertising, PR, digital, and analytics to help their strategic their relationships for growth, revenue, and margin
One One Agency	COMMERCIAL / CREATIVE	Services include traditional PR, digital/social media, branding, creative, and websites
160	CREATIVE / CULTURAL	Services include advertising, branding, experiential, brand partnerships, PR and communications
Binary	CREATIVE / CULTURAL	Services include creative, website design, digital consulting, media consulting, social media strategy, UX/UI design, marketing technology, marketing business strategy, video content, product development, product innovation and brand strategy
BATTSBY	BATTERY	Services include brand strategy and planning, advertising, storytelling, video production, TV and digital, all channels, design, social measurement, content, content, integrated campaigns, and creative
Blue Chip	CREATIVE / STRATEGY	Services include research strategy, brand, creative, media, product



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Year-end summary

January-February 2024 | Volume 74

Industry analysts are eager to find out how the major holding companies are doing financially in the first quarter of 2024. Will they deliver against market expectations? Is the slowdown continuing? Are some agencies handling uncertain times better than others? Will they meet their profit margin or organic growth targets and make adjustments? In December, Dentsu, GroupM, and IPG released their 2024 advertising forecasts, all predicting that global ad spend would range from 4% to 7% growth, fueled by digital, retail media, and CTV. Some of these forecasts are also based on a significant boost resulting from the US presidential election and large political ad spending; the Super Bowl; the UEFA European Football Championship; and the Summer Olympics in France. Even a slow start in Q1 may be offset by a solid ramp-up during the course of 2024.

March-April 2024 | Volume 75

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.

May-June 2024 | Volume 76

Which holding companies are the highest performing in Q1 2024? Publicis Groupe is gaining momentum with revenue up by 26% from 2021 to 2023 and doubling market cap from 12 billion euros in early 2021 to over 25 billion euros in early 2024. Omnicom is now its closest competitor, in terms of revenue, EBITDA, and net income, but trailing by 50% in market cap. In Q1, M&A activity in Media & Marketing showed significant signs of recovery and hit record Q1 levels, with a 7% YOY increase. The slow but steady increase in activity signals a positive economic outlook across the sector, supported by a healthy worldwide advertising outlook. It appears

that recession fears are evaporating and marketing budgets are on the rise. Digital is expected to account for 58% of all marketing spend this year. Not surprisingly, digitally led agencies (across media, digital, adtech, martech, CRM, and data and analytics) continue to attract the most buyer interest, accounting for 44% of all deals.

July-August 2024 | Volume 77

Current global economic challenges—geopolitical events, international conflicts, public health concerns, high and sustained inflation, high interest rates, and labor and supply chain—are contributing to economic uncertainty and volatility. Yet the numbers look good for advertising thus far. What’s fueling the growth in global advertising? The answers lie in macroeconomic factors and underlying forces that GroupM sees as driving ad spending growth, including “media innovation” (ad-supported streaming across all the major platforms), “commerce innovation” (the rise and continued expansion of retail media networks), and the “largest-ever cyclical boost” (four major national elections and three major global sporting events). The biggest advertising players, such as Publicis Groupe, are reporting strong organic growth in Q2 2024 and healthy profit margins despite getting future-ready by investing in AI and new ways of operating their business. M&A is also strong as the talent battle rages on.

September-October 2024 | Volume 78

How do you like your coffee? Hot and strong like the ad industry? Brian Wieser of Madison and Wall indicated that CEOs and CFOs of large advertisers (including Coca-Cola, Colgate-Palmolive, General Mills, Kraft Heinz, Mondelēz, and Verizon) continue to exude positivity toward spending on advertising and marketing, consistent with the results we see and expect to see from media owners in the near term. Madison and Wall published new estimates for the global marketing industry that forecast marketers will spend \$2.4 trillion. The industry continues to grow at a remarkable pace, fueled by a very healthy economy. Digital advertising platforms are taking the lion share, led by retail media. For all of 2024, Madison and Wall expects 7.2% growth (excluding political advertising) as total advertising sales approach \$400 billion in annual revenue for media owners.

November-December 2024 | Volume 79

Holding companies are concerned about macroeconomic uncertainties in light of the US presidential election and a number of geopolitical conflicts around the globe. An increasingly challenging macroeconomic environment is forcing agencies to look for efficiencies and careful investments, like AI. Publicis Groupe leads the pack with Q3 net organic growth of 5.8%, a record margin of 18%, and a very strong financial year overall. Not everyone is doing as well. We will see early next year how Q4 earnings affect year-end overall performance. What’s clear is that a fundamental shape-up is underway among the largest players.





Industry stats and projections

Worldwide advertising

- Holding company Dentsu updated its **global advertising forecast**, conservatively projecting 4.6% spending growth in 2024 to \$752.8 billion, bolstered by digital advertising, retail media, CTV, and key events (UEFA Euro 2024, the Paris Olympics, and the US political election), compared with IPG Mediabrands' Magna, which predicted 7.2% ad revenue growth in 2024. The forecast takes into consideration media price inflation and the uncertainty of global economic conditions, including the Israel-Hamas and Russia-Ukraine wars.
- 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.
- The **worldwide advertising outlook** suggests a 5.9% increase in ad spending in 2024 (based on input from the big four—Dentsu, IPG Mediabrands' Magna, Publicis Media's Zenith, WPP's GroupM). The global forecast ranges from +4.8% (from Zenith) and +7.2% (from Magna), for an average of 5.9%. For 2025, the current global forecast is +4.2% (according to Dentsu and GroupM). The US forecast for 2024 is an average of +7.1% (dropping to +2.8% in 2025). The November US presidential election alone is forecast to account for about a third (\$11 billion) of the incremental ad spend in Dentsu projects digital will increase to 62% of total spend by 2026, compared with 58.2% in 2023.
- Per **Gartner**, marketing budgets dropped to 7.7% of overall company revenue in 2024 (down from 9.1% in 2023, falling an average of 15% as organizations pursue growth in the "era of less.")
- Per WPP's GroupM, **global advertising revenue** will grow by 7.8% to \$989.8 billion in 2024, higher than its original 5.3% growth prediction, reaching \$1.1 trillion revenue in 2025, up 6.8% YOY. In the US, advertising revenue is forecast to reach \$365.9 billion, up 5.8%. Digital pure-play advertising is expected to comprise 70.6% of total ad revenue in 2024, totaling \$699 billion, reaching \$985.6 billion in 2029. 69.5% of global ad revenue is predicted to be informed by AI in 2024, with the figure reaching 94.1% by 2029.
- Per Gartner, **marketing budgets** have dropped from an average of 9.1% of company revenue in 2023 to 7.9% in 2024, a fall of 15% year over year. In 2024, marketing budget as a percentage of total revenue is 8.4% in B2B and 5.7% in B2C. Paid media is the largest share of budgets at 27.9% of total 2024 spend compared to agencies (21.6%), martech (23.8%), and labor (22.6%). Paid media budget allocations across journey stages: 28.6% brand awareness, 22.5% consideration, 27.9% conversion to sale, and 20.6% loyalty and advocacy. Search advertising and SEO lead digital spend with 14% in search advertising and 12% in social advertising. Event marketing and sponsorship receive most offline spend at 17.1% and 16.4%, respectively.

US advertising

- 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.
- IPG Mediabrands' Magna unit revised its **2024 US advertising growth** estimate to 11.4% (8.9% excluding cyclical events such as the Olympics and elections), the result of a stronger macroeconomic outlook, higher-than-anticipated second-quarter growth, and demand for digital media and CTV. This revision brings the Big 4 agency holding company estimate up to +8% (average of the four companies).
- Per Ad Age, among the top **200 US advertisers**, 122 increased US spending in 2023 and 78 cut spending. The median increase for US ad spending was 4.1%. Fifty-six advertisers spent more than \$1 billion, with Amazon at top (\$13.3 billion for ad and promotion spending). Average US organic growth for the four biggest agency holding companies—WPP, Publicis Groupe, Omnicom, and Interpublic Group of Cos.—was 0.9% in 2023, down from 8% in 2022.
- Per **ProcureCon Marketing**, the most popular spending areas in 2024, according to conference attendees: creative and design (74%), digital, including website, SEO, development, (70%), content management and production service (68%), agency auditing (67%), and marketing spend management (65%).

Digital advertising

- Per Forrester Research, the **global digital economy** is expected to grow at a 7% compound annual rate, from \$11.8 trillion in 2023 to \$16.5 trillion in 2028. The US digital economy is forecast to rise by 6.4%, from \$4.4 trillion in 2023 to \$6 trillion in 2028.
- Per Greenwich Capital Group and their **Q2 2024 AdTech & Marketing Services Industry Update**: Announced transactions in adtech and digital marketing increased in Q2 2024 with 175 deals, up from 106 in Q1 2024, a 65% decrease.
- Per **Trustworthy Accountability Group**, the digital advertising industry collectively saved an estimated \$10.8 billion in 2023 by dramatically reducing fraud related to invalid traffic in US display and video ad channels by 92%.



Media, programmatic, and social

- CBS reported that the ad inventory for the **2024 Super Bowl** (February 11 in Las Vegas) was sold out. Ad placements cost \$7 million for a 30-second unit. Confirmed brand advertisers include BMW, BetMGM, Coors Light, Dove, Drumstick, Etsy, Hellmann's, M&M's, Mtn Dew, Nerds, Oreo, Pringles, Squarespace, Temu, and TurboTax.
- The Association of National Advertisers (ANA) issued its report on **Programmatic Media Supply Chain Transparency**. Based on that study, only 36 cents of every dollar that enters a demand-side platform (DSP) effectively reaches the consumer: Transaction costs—primarily DSP and supply-side platform (SSP) fees—account for 29% of the ad dollar and loss of media productivity costs account for 35% of the ad dollar. Per the study, there is some \$22 billion (out of \$88 billion in open web programmatic advertising) in efficiency gains available to the client-side marketer community.
- **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 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.
- 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).
- Based on its **Principal Media Report**, the ANA called on its members and brand marketers to revisit media agency contracts and introduce auditing of so-called principal media sales to prevent conflicts of interest.
- Per eMarketer, **US omnichannel retail media ad spend** is forecast to reach \$129.93 billion in 2028, up from \$54.85 billion in 2024, accounting for almost a quarter of all US media ad spend. 81% of advertisers feel retail media is at least "very important" to their strategies. Retail media is critical as the first-party data it gathers from retailers allows for better targeting across social, search, and the open web.
- Per COMvergence, the **average client retention rate in 2023** was 25% among media agencies, the lowest since 2016. Among the top holding companies, Publicis scored the highest retention rate at 61% compared with 45% for GroupM.

- Per COMvergence, **top global media agency networks** (ranked by billings): GroupM's EssenceMediacom was top-ranked for 2023 with global billings at \$24.5 billion, followed by Omnicom Media Group's OMD with \$24 billion (the highest growth rate, of 8.7%, among the top 10 agency networks). GroupM's Mindshare placed third with \$21 billion (+6%). The global billings managed by the Big 6 holding companies plus major independent media agencies reached \$242 billion in 2023, and digital media investments reached a 51% share of global spend managed by the Big 6 and major independents assessed. Local independent media agencies accounted for \$28 billion, or about 11%, of the total billings globally. New York-based Horizon Media is the largest independent media agency worldwide with 2023 billings of \$8.1 billion.



Pay attention to what creates value: Output without impact is irrelevant. Find ways to help drive results for the business, no matter what team you sit in."

Lorraine Twohill
CMO, Google

Google

- Per eMarketer, **total media ad spend in the US** will reach \$389.49 billion in 2024. Over three-quarters (77.7%) will go toward digital channels like mobile, desktop/laptop, and CTV.
- R3 issued a guide called "**Upfront Negotiations for Media Financial Decision-Makers**," which demystifies the process while exploring how upfront commitments affect cash flow and budgeting, compared to scatter buys, especially for clients interested in linear television who are seeking to communicate with financial decision-makers about the TV media landscape.

- Per Ampere Analysis, the **six biggest entertainment companies** (Disney, Comcast, Google, Warner Bros. Discovery, Netflix, Paramount) are projected to increase spending on content in 2024 by 9%, reaching \$126 billion, amid cost-cutting concerns over TV and movie content. Walt Disney, with \$35.8 billion in spending on original and acquired content, is expected to lead the group.
- Per the WFA, five trends connected to the **predicted return to a rising inflationary market environment**:
 1. Inflation is challenging for media budgets (reaching fewer people)
 2. Good news on retail media, the fastest-growing channel, but now with lower prices
 3. Traditional media in decline
 4. Holding pattern in the US
 5. Everything's very normal
- **Top 10 priciest shows for ads in the 2024-25 broadcast year**: *Sunday Night Football* on NBC (\$1M for 30-second ad), followed by *Monday Night Football* on ABC (\$637K), *Thursday Night Football* on Prime Video (\$562K), *American Idol* on ABC (\$131K) and *The Voice* on NBC (\$126K).
- Per the WFA, nine of the top 10 global media markets will see **higher media prices** in 2025 (+2.3%) compared with 2024 (+2.1%).

Other/miscellaneous

- Per TrinityP3 marketing management consultancy and its **State of the Pitch report**, 89% of agencies unsuccessful in pitches were not paid a fee by the client. 5% of agencies were paid up to \$10,000 each, 1% were paid between \$10,000 and \$20,000, and 1% were paid more than \$20,000.
- The 4A's and the ANA jointly published a report, "**Decoding Compensation Models and Implementing the Right Model**," exploring alternative compensation models that focus on better outcomes for both brands and their agencies and reviewed pros and cons of various models in detail, including fixed fee, hourly rate, commission, performance, and subscription.
- Per **Michael Farmer**, chairman and CEO of Farmer & Company: "42% of the top 50 advertisers increased their sales by less than 2% over the last 13 years despite media spend increases of 300%, increases in SOW deliverables of 300%, and GDP growth of 31%. The massive increase in media spend and SOW deliverables generated poor yields for nearly half of the world's top advertisers. Badly designed SOWs are surely one major cause. Too many SOWs are simply designed to 'cover all media channels,' as if total channel coverage were the route to brand success. Too much media money is being spent for meager returns."

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- The 4A's issued its **2024 Analysis of Agency Costs**, which includes data from 109 agencies, categorized into six gross-income groups for independently owned agencies (89 agencies) and four groups for network agencies (20 agencies). The data includes agency performance across payroll departments, profit and loss categories, and gross income per employee.
- Per the **"Cost of The Pitch"** report (co-produced by the ANA and the 4A's), 66% of all new business reviews in 2022 ended with the incumbent retaining the account. Agencies spend between \$200,000 and \$400,000 to pitch or defend business.
- Per **Dentsu Creative's 2024 CMO Report**, 83% of global CMOs believe that creative ideas can transform their businesses. 79% plan to invest more than 10% of their budget in innovation, and 56% will invest more than 20% over the next 12 months.
- Per Ciesco and their **Q1 2024 Global M&A Update**, deal activity continues to recover as the volume shows a 7% YOY increase. The value of deals decreased from \$32.3 billion to \$28.3 billion. Digitally led agencies (digital media, digital agency, adtech/martech, CRM, data and analytics) continue to attract the most buyer interest, accounting for 44% of deals in Q1 2024.
- Mike Lander, of Piscari Ltd., released research based on **sales negotiation archetypes** (Analyser, Preparer, Commander, and Trust Builder), called "The Trust Builder: Why Building Rapport Beats Hard Bargaining in B2B Sales Negotiations." Per Lander, "Trust Builders, with their emphasis on empathy, flexibility, and mutual value, consistently outperform other negotiators, proving that fostering strong relationships can be the key to long-term negotiation success."

Key client budget moves

- **Procter & Gamble** 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.
- **Procter & Gamble** generated \$2 billion in annual cost savings by digitally enhancing its supply chain and product development process. The firm is also rolling out new media capabilities, leveraging first-party data and algorithmic solutions to boost reach and optimize marketing.

Digital giants

- **Meta** reported 27% YOY revenue growth, reaching \$36 billion in Q1 2024 and \$39 billion in Q2 2024, with 98% of its sales coming from advertising, primarily on Facebook and Instagram in Q1 2024, compared to Google's ad business, Alphabet, which reported revenue growth of 14% to 15%, reaching \$80.5 billion in Q1 and \$84.7 billion in Q2. Meta expects full-year 2024 capital expenditures to be \$37 billion to \$40 billion as they accelerate infrastructure investments to support their artificial intelligence road map.

Holding companies' financial results

Dentsu

- **Dentsu** reported an increase of 0.7% in net revenues YOY for Q4 FY 2023, with an overall net revenue growth of 1.6% for FY 2023, 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 FY 2023 was reported at 14.5%. Dentsu is projecting 1% organic growth and an operating margin around 15% in 2024.
- **Dentsu** posted a 3.7% decline in organic growth in Q1 FY24 as a result of client losses and a soft market for its customer transformation and technology division. Japan was the strongest performing region with organic growth of 2.4% (also the firm's largest region, accounting for 43% of its revenue). The group reiterated full-year guidance of approximately 1% organic growth.

Havas Group

- 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 10 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.
- Vivendi subsidiary **Havas Group** reported net revenues of 617 million euros for Q1 FY24 with organic growth of 2%. North America reported an organic net revenue decline of 4% while Europe grew by 5.5%. Havas acquired three companies: B2B specialist agency Ledger Bennett, social marketing agency Wilderness, and digital transformation consultant Ted Consulting. Key new business wins included FedEx in Europe (creative) and Famous Footwear in the US (media).

Interpublic Group

- 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.
- Interpublic Group** reported \$2.5B in revenue for Q1 FY24, up 0.3% YOY with organic growth of 1.3%. Net income was \$110M with a 9.4% margin on net revenue. Data-and tech-driven media offerings, healthcare marketing, and PR capabilities continued to perform strongly. Key highlights include further embedding precision and performance into the integrated, full-funnel media solutions, integration of technologies such as generative AI into marketing services capabilities (including the partnership with Adobe to speed content ideation, creation, production, and activation), and proprietary best-in-class Acxiom data. Staff cost ratio is at 72.1%. The firm targets a 16.6% EBITA margin for the full year.

- Interpublic Group** reported \$2.71 billion in revenue for Q2 FY24, down 0.1% YOY, with organic growth of 1.7%. US organic growth was 1.3%; international organic growth was 2.6%. The firm reported net income of \$214.5 million. IPG Mediabrands and IPG Health led the way with notable contributions to growth from Deutsch LA, Golin, and Acxiom. Key drivers included dynamic media offering and new media buying models, leading healthcare capabilities, and exceptional talent in marketing services, high-growth media channels and digital commerce, scaled data management and proprietary identity resolution products, seamless delivery of integrated client solutions, and personalized, data-infused creativity, increasingly powered by generative AI. IPG expects to achieve full-year organic growth of approximately 1% and, at that level of growth, continue to target an adjusted EBITA margin of 16.6%.
- Interpublic Group** reported \$2.63 billion in revenue in Q3 and net revenue of \$2.2 billion, with organic revenue flat from Q3 2023. Organic growth over the first nine months of 2024 is 1%, due to growth from media services, sports marketing, data management, and public relations. The group reported a non-cash goodwill impairment expense of \$232 million related to digital specialist agencies and progress with the strategic sales process for R/GA and Huge. Reported net income was \$20.1 million, and the margin of adjusted EBITA was 17.2%. For the first nine months net revenue was \$6.75 billion, down 0.9%. Organic revenue growth for the nine-month period was 1%. The group recently announced Interact, the latest evolution of its marketing engine, a platform that delivers connectivity and global reach and serves as Interpublic's core technology platform infrastructure fueled by Acxiom's data and Real ID capabilities.

2024: Agency Reviews and Roster Changes

Visit agencymania.com/2024-agency-reviews-and-roster-changes to view and download the consolidated list of Agency Reviews and Roster Changes from our 2024 bimonthly Industry Updates.

The image shows two screenshots of reports from AgencyMania.com. The top screenshot is titled '2024: Agency Reviews and Roster Changes' for the 'Consumer Packaged Goods (CPG)' sector. It features a table with columns for 'Brand', 'Client', 'Relationship', 'Creative Scope', 'Focus Area', 'New Agency', and 'Status'. The bottom screenshot is for the 'Apparel and luxury' sector, also with a similar table structure. Both reports list various brands and their associated agencies, such as 'carter's', 'DSW', 'FAMOUS FOOTWEAR', 'Foot Locker', 'FOSSIL', 'GAP', 'HANESbrands Inc.', 'J.CREW', 'JOHNSTON & MURPHY', 'PRINTTEMP'S', and 'zalando'.

Omnicom

- **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.
- **Omnicom** reported Q1 FY24 revenue of \$3.6B with organic growth of 4% and operating income margin of 13.8%. Reported revenue in the first quarter of 2024 increased by \$187.2 million, or 5.4%, to \$3,630.5 million. Worldwide revenue growth in the first quarter of 2024 compared to the first quarter of 2023 was led by an increase in organic growth of \$136.9 million, or 4%. Organic growth by discipline (YOY): 7% for Advertising & Media; 4.3%, Precision Marketing; 9.5%, Experiential; 2.1%, Healthcare; 3.8%, Branding & Retail Commerce; 1.1%, PR. Salary and service costs increased \$149.7 million, or 5.9%, to \$2,692.6 million, mostly due to salary and related cost increases and the acquisition of Flywheel Digital. EBITA was \$500.4 million, with a 13.8% margin.
- **Omnicom** reported \$3.9 billion in revenue for the second quarter of 2024 (up 6.8%), with organic growth of 5.2% and net income of \$328.1 million. Acquisition revenue increased revenue by \$93 million, or 2.6%, primarily due to the Flywheel Digital acquisition. Organic growth by discipline: 7.8% for Advertising & Media, 17.6% for Experiential (related to the Summer Olympics in Paris), 2% for healthcare, 1.4% for Precision Marketing, 0.9% for Public Relations, -3.8% for Branding & Retail Commerce. Organic growth by region: 6.3% for the US, 4.5% for Euro Markets & Other Europe, 6.9% for the UK, 24.5% for Latin America, 8% for the Middle East & Africa, -0.1% for Asia Pacific, and -8.3% for Other North America. Operating expenses included \$57.8 million of severance actions related to ongoing efficiency initiatives, including strategic agency consolidation in smaller international markets and the start of a centralized production strategy with the creation of the new Omnicom Production unit. Non-GAAP adjusted EBITA was \$589.6 million and had a 15.3% margin. Omnicom is increasingly focused on transitioning to performance-based revenue models.

- **Omnicom** reported revenue of \$3.9 billion in Q3, an 8.5% increase, with organic growth of 6.5%, 7.9% EBITA growth, and net income of \$385.9 million due to the Flywheel Digital acquisition in the Precision Marketing discipline and strong growth by discipline. Organic growth by discipline was 9.4% for Advertising & Media, 35.3% for Experiential, 4.3% for Public Relations, partially offset by declines of 1.1% for healthcare, and 5.4% for Branding & Retail Commerce. Organic growth by region: 6.5%, United States; 10.9%, Asia Pacific; 6.8%, Euro Markets & Other Europe; 24.8%, for the Middle East & Africa; 8.7%, Latin America. Operating income reached \$600 million, and the group secured a 16% margin.



What we’re looking for is not service providers. We’re looking for partners.”

Victoria Lozano
Executive Vice President, Marketing, **Crayola**

Crayola[®]

Other Groups

- Per Ad Age, the **worldwide revenue** of the 30 biggest agency companies reached \$148 billion in 2023. Revenue for the world’s 30 biggest agency companies rose by 5.6% in 2023. WPP held its position as the top company, followed closely by Accenture Song. The five largest legacy holding companies—WPP, Publicis Groupe, Omnicom Group, Interpublic Group of Cos. and Dentsu Group—collectively grew revenue by 2.7%. Organic growth was 1.3% on average across WPP, Publicis, Omnicom, Interpublic, and Dentsu. The 2024 organic growth forecast is 2% to 2.8% across those same agencies. Employment is up 1.6%, for a total of 421,895 employees.

Publicis Groupe

- **Publicis Groupe** reported €13.1 billion (\$14.14 billion) in revenue for FY 2023, 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.



- **Publicis Groupe** reported €3.3B (\$3.5B) in revenue for Q1 FY24, up 4.9% YOY, with 5.3% organic growth due to solid performance across all regions: Continued strong growth in the US (which represents 60% of revenue) at +5% driven by data and media, Europe at +6% on top of a strong comparable in Q1 2023, and China accelerating at +7%. The group claims to grow twice as fast as the industry average. A few highlights: Publicis is expected to post the highest organic growth in the industry. Epsilon is reporting 7.2% organic growth fueled by interest in digital media and data. 3,033 main clients represent 92% of the group's net revenue.
- **Publicis Groupe** reported better-than-expected net revenues of 3.5 billion euros (\$3.7 billion) in Q2 (up 6.8%) with a net organic revenue growth of 5.6%, driven by high demand for data-led marketing and strong performance by Epsilon (+6.1%) and media (double-digit) but also continued softness by Publicis Sapient (-3.8%). Organic growth in the US was 5.3% followed by Europe (4.2%). Other strong markets/regions: Asia Pacific (7.7%), China (10.5%), Middle East & Africa (9.1%). Latin America grew nearly 19%, led by Brazil, Mexico, and Colombia. Although Publicis Groupe ranked third behind Accenture's Accenture Song (second) and WPP (first) in terms of 2023 worldwide revenue, it is expected that Publicis Groupe might move up in the rankings by year-end. Operating margin rate reached a record high 17.3% in H1, including talent and AI investment (45 million euros). The group also reported accelerating bolt-on acquisitions to reinforce existing capabilities (Spinnarkersca, AKA, Downtown). Three strategic bets:
 1. Investing 9 billion euros in data and tech (Epsilon, Publicis Sapient)
 2. Shifting to country model, connecting data, creative, media, and tech
 3. Transforming culture, embarking people on the group's transformation
- **Publicis Groupe** reported €3.4 billion in net revenue for Q3 (\$3.74 billion), up 5.6%, with organic growth of 5.8%. The group ranked #1 in net new business in Q3 and 2024 YTD. North America net revenue was up 4.7% organically. Europe net revenue was up 4.9% on an organic basis (5.6% reported). Net revenue in Asia Pacific recorded 6.6% growth on a reported basis and 6.4% on an organic basis. Net revenue in the Middle East and Africa region was up 13.6% organically (10.5% on a reported basis), largely driven by double-digit growth in Media and at Publicis Sapient. In Latin America, net revenue was up 30.3% organically, led by both Media and Creative, notably in Brazil, Colombia, and Mexico. The group invested \$1 billion in acquiring Influential, the world's largest influencer marketing platform, and Mars United Commerce, the #1 independent commerce marketing company, directly linking this expertise with Epsilon's identities. The operating margin rate was reported at 18%. The group expects 5.5% organic growth for the full year and an industry-leading 18% operating margin rate.

S4 Capital

- 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.
- London-based **S4 Capital** continues to struggle. The holding company reported a double-digit revenue decline in Q3 2024. Net revenue was down 15.2%, with an organic revenue decline of 12.6%.

Stagwell

- **Stagwell** reported strong 2023 results with \$2.5B revenue, \$270M in net new business, and \$30M in operational efficiencies. In Q1 FY24, the firm reported \$670M in revenue, an 8% YOY increase, organic growth of 5% fueled by the double-digit growth of the Performance Media & Data Capability, a 17% margin, and net new business wins of \$66 million. Stagwell also strengthened its offering by welcoming the agencies Team Epiphany, Sidekick, Pros, and What's Next Partners to the Stagwell family in Q1.
- **Stagwell** continues to thrive. The firm reported revenue of \$711 million and growth of 15% YOY, with a 25% increase in digital transformation in Q3 2024 and a record quarter of new net business (\$345 million). A notable win, the largest in the company's history, was landing a three-year contract with Adobe. Stagwell also expanded relationships with leading brands like United Airlines and Microsoft. Stagwell Marketing Cloud Group grew 30%, now 10% of the company revenue. Digital transformation is 26% of the company revenue.

WPP

- **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, Mondelēz, 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%.



- **WPP** reported €3.4B in Q1 FY24 revenue (or \$4.3B), a reduction of 1.4% YOY and negative organic growth of 1.6%. Growth in the UK and Western Continental Europe was offset by declines in North America and Asia-Pacific, which saw strong growth in India offset by a decline in China. Global Integrated Agencies revenue less pass-through costs declined by 0.7%, with 2.4% growth in GroupM offset by a 3.3% decline at integrated creative agencies after the loss of assignments at a healthcare client and reduced spend at technology companies. New client assignment wins came from AstraZeneca, Canon, Molson Coors, Daiichi Sankyo, Nestlé, Perfetti, Perrigo, Rightmove, and Telefónica. Q1 net new billings were \$0.8B. Burson, GroupM, and VML are on track to deliver targeted in-year savings.

- **WPP** reported negative growth of 1% in H1 2024, reflecting growth in GroupM with the US back to growth in Q2, Ogilvy (new business wins) and Hogarth (benefiting from demand for AI driven personalized and addressable content, with strong growth from CPG and auto clients) but also the known impact of 2023 client losses (tech client spending still down -1% vs. -9% in Q1 and micro-pressure on project-related businesses and challenges in China. Overall, WPP reported -3.6% growth in H1 2024 (compared to last year's +5.5% growth in H1). New client assignments included AstraZeneca, Colgate-Palmolive, J&J, and the Government of Canada with Q2 net new billings \$0.9B. WPP won 160 Lions at the Cannes Lions 2024 and continues to show progress in leading innovation and the use of AI (WPP Open). Margin for H1 was 11.5%, resulting from structural savings and cost discipline. WPP is projecting growth of -1% to flat, operating margin of 16-17%.



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.

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Visit agencymania.com/a-cmos-wake-up-call to check out our article, “A CMO's Wake-up Call: not Who but How”: A new mindset is desperately needed, shifting the focus from who the right partner is to how to operate and make any partnership successful!



- **WPP** reported £3.5 billion revenue in Q3 2024 (\$4.6 billion), a 1.4% increase, with a strong performance from GroupM and growth in North America, Western Continental Europe, and India, and organic growth of 0.5%. The top 10 clients grew 7% in Q3. Net new billings reached \$1.5 billion. Wins included two of the world's top 10 advertisers: Amazon (media ex Americas) and Unilever (media, retail media and activation, and creative). Henkel (media) is another notable win. Burson, GroupM, and VML are on track to deliver targeted savings and build simpler, stronger businesses. Hogarth grew due to client assignment wins. VML, affected by the Pfizer loss, declined, and AKQA declined due to macro-pressure on project-based work.

Agency financials and budget cuts

- **Omnicom** secured a \$600 million loan agreement from a consortium of banks (Citibank, Barclays, etc.) to be used for general corporate purposes, including acquisitions.
- 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%.
- 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.
- Per **COMvergence**, for the first half of 2024, Omnicom's PHD is the top-ranked agency in global new business (\$3.3 billion, which included its retention of the \$2.2 billion global Volkswagen account), followed by sibling agency OMD at #2 with nearly \$1.5 billion in new client wins and retentions, due notably to the consolidated win of Gap Inc. in the US (\$590 million) and the retention of Mercedes-Benz Group in China (\$110 million). Starcom was ranked #3 with \$1.2 billion in new client wins, including LEGO Global (\$440 million) and Nestlé China (\$420 million).
- Per **R3**, Publicis Groupe tops the New Business League rankings, outpacing the competition with \$227 million in YTD creative revenue and 514 wins. In second is Omnicom, driven by a strong \$166 million in media revenue. Dentsu and WPP rank third and fourth, respectively.

Mergers and acquisitions

- Per Ciesco, **Technology & Media sector M&A** activity was on an upward trajectory as of Q3 with 1,584 M&A deals for a disclosed value of \$68B. Digitally led agencies continue to attract the most buyer interest, accounting for 55% of all deal volume. M&A activity in the US, UK, and Western Europe led the way, accounting for 77% of all activity.
- New Zealand-based global marketing services company **Attivo Group** acquired two agencies, Hill Holliday and Deutsch New York, that were part of holding firm IPG for 20+ years. The two agencies retained an "affiliate" relationship with IPG. With the two acquisitions, Attivo Group is now entering the US market.
- Privately held Texas-based **PMG** acquired RocketMill, a full-service digital marketing agency based in London, with clients like Dropbox, Sky Bet, Hyundai, and Kimberly-Clark, to accelerate the group's expansion into Europe.
- **Stagwell** acquired Team Epiphany, an agency that specializes in cultural relevance, experiential, and multicultural marketing. Team Epiphany has offices in New York, Los Angeles, and Miami and clients such as American Express, HBO Max, and Lego. The agency joined Stagwell's Constellation network of agencies (72andSunny, Colle McVoy, etc.).
- **Havas** acquired Hamburg-based digital performance-marketing agency Eprofessional in a move to expand its portfolio of performance-marketing services and strengthen the Havas Media Network. The agency, with clients like Vodafone and L'Oréal, joined the Havas Media Network.
- **Accenture Song** acquired Work & Co, a design and tech agency with clients such as Pfizer, Apple, Gatorade, Google, and the PGA Tour in the US, Europe, and Latin America.
- Marketing transformation company **Fusion92** acquired TRAK Data, an SaaS, AI-driven data platform. The TRAK Data team will join Fusion92's existing data and analytics department.
- WPP's **FGS Global** acquired Canadian communication and public affairs advisory firm Longview Communications. Longview, a specialist in reputational issues, will operate as FGS Longview Canada, strengthening FGS Global's capability and expertise in strategic advisory and communication and helping clients to navigate reputational challenges in an increasingly complex stakeholder, financial, regulatory and political environment.
- **Havas** acquired Singapore consultancy Klareco Communications, which is now part of its H/Advisors corporate and financial network (and named H/Advisors Klareco) in a move to strengthen the group's presence and capabilities in the Asia-Pacific region.
- **Accenture** acquired ConcentricLife, a leading healthcare marketing agency with expertise in helping life science brands build an optimal brand experience. The agency offers full-service digital healthcare marketing and communication expertise and capabilities that help brands answer rising consumer demands in rare diseases, health, and wellness.



- **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. **Omnicomis** the world’s second-largest ad holding company, with nine acquisitions, such as Grabar & Partner and Flywheel Digital. **AccentureSong**, 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.
- 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 re-branded 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.
- **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.



At AT&T, we always say our agency partnerships are marriages, not flings. We do really treat it like a marriage in the way that we communicate.”

Lianne Sinclair
Vice President of Advertising and Social Media, AT&T



- **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.



- Per Ciesco, **M&A activity in Media & Marketing** shows significant signs of recovery and hit record Q1 levels, with a 7% YOY increase. Global M&A activity is on the rise, including across Content, Production, Events, Media and Analytics. Growth is strong among the Content/Production, Agency Services, and Events sectors, while Traditional Media has more than doubled Q1 2023 activity. Strategic acquirers lead the activity, though the top 10 buyers list features both strategic and private equity; STPR, Accenture, and Atravia were the most active buyers.
- **Havas** acquired Dubai-based e-commerce and retail media firm Liquid, with clients such as Nestlé, PepsiCo, Beiersdorf, and Procter & Gamble. Renamed Liquid Havas, the agency will become part of Havas Market, the e-commerce practice launched in 2020, which operates in 30+ markets worldwide.
- **Havas** acquired French digital transformation and data consultancy firm Ted Consulting, which helps clients automate business processes with artificial intelligence-infused robotic process automation technology. The firm will join the organization under Havas Media Network's business science division and expand the group's capabilities in data, automation, robotization, and AI.
- **The Shipyard** acquired Fahlgren Mortine, one of the top 20 firms in the nation (O'Dwyer's), and Mid-Sized Agency of the Year as designated by the Public Relations Society of America. The Shipyard will maintain the Fahlgren Mortine brand and now have access to expanded media buying volume, creative firepower, and data and analytics resources. The combined company represents \$350M in billings, 400 professionals, and 10 offices.
- **Billups**, a global OOH managed-services agency, acquired New Zealand-based OOH agency Billie Media in a move to enhance media performance via its analytics platform in the region and to leverage Billie Media's in-house technology, creative optimization, and measurement solutions.
- **BarkleyOKRP** acquired Adlucent (from Advantage Solutions), a performance media and marketing technology company that creates custom paid media strategies for retail and service companies across search, display, social, and retail media networks. Adlucent is considered Google's largest shopping ads agency in the US.
- **Stagwell** acquired São Paulo, Brazil-based brand and marketing consultancy Pros Agency (with clients like Amazon, Mondelēz, Porto, and Kimberly Clark), which is now aligned with its global marketing network Allison. The agency offers creative planning and production, influencer marketing, digital PR, and other brand capabilities.
- New York-based independent, full-service, creative media agency **Modco Media** acquired Cavera, a Canadian-based digital marketing agency specializing in customer experience, design, and web development, catering primarily to midsize e-commerce brands and public sector organizations.
- London-based consultancy **MediaSense** acquired PwC's UK marketing and media business in a move to help MediaSense scale and improve its capabilities and offerings to clients while integrating PwC's relationships and team into the business.
- **Publicis Groupe** acquired Las Vegas-based creator marketing agency Influential, the world's largest influencer marketing agency and Ad Age's 2024 social media/influencer agency of the year, to boost the firm's influencer marketing capabilities. Influential worked with brands such as Walt Disney Company, McDonald's, Meta, Amazon, Mattel, and Hilton. Influential's proprietary AI-powered technology platform houses 100 billion data points from a network of over 3.5 million creators and 90% of global influencers with 1 million or more followers.
- **Stagwell's The Harris Poll** acquired BERA (Brand Equity Relationship Assessment), a SaaS platform that quantifies and predicts brand impact on long-term business value based on its always-on syndicated survey of 4,000 brands, covering more than 200 sectors. BERA will be integrated within HarrisQuest service, a suite of martech research products, including AI-enabled self-service polling and other "instant" SaaS solutions.
- **Stagwell** acquired Tel Aviv-based Leaders, a digital agency specializing in influencer marketing and social commerce, which is now part of Stagwell Marketing Cloud's PRophet Comms Tech Suite of AI-powered products. The agency is known for its creation of the InfluencerMarketing.AI (IMAI), a global influencer marketing SaaS platform that connects 300 million creators worldwide. Brands (such as Nespresso, Samsung, Colgate-Palmolive, Coca-Cola, Estée Lauder, and Superdry) can launch campaigns while using its analytics, sales prediction models, and campaign management tools.
- **Informa Plc**, which hosts conferences, exhibitions, and training courses around the world, acquired Ascential Plc, the owner of the Cannes Lions conferences, for approximately £1.2 billion (\$1.5 billion).
- Creative design platform **Canva** acquired Australian startup Leonardo AI, which offers an advanced generative AI platform for creating images and art based on open-source stable diffusion AI models. Canva will integrate Leonardo's proprietary tech and "Phoenix" foundation model into its suite of AI products.
- Brand and consumer-focused **S3 Agency**, based in Boonton, New Jersey, merged with B2B specialist McMillan, based in Ottawa, Ontario, after a yearlong partnership during which the agencies worked jointly on clients across industries such as luxury automotive, tourism, sustainability, high tech, home goods, education, and insurance. Clients include Intuit, United Rentals, Dunn & Bradstreet, BMW North America, and Franklin Mutual Insurance.
- **OuterBox** acquired TopSpot, a Houston-based digital marketing agency specializing in SEO, PPC, UX/CRO, email marketing, paid media, analytics, and website design for the industrial-manufacturing sector, making it one of the largest independent performance-marketing agencies in the US.
- Independent San Diego-based agency Mindgruve and Denver-based agency Macarta (Denver) merged into an agency called **MindgruveMacarta**, now combining expertise in performance marketing, retail media, and advanced analytics with more than 300 employees across multiple offices including Mexico City, São Paulo, Amsterdam, Madrid, and London.



- **Ascential** (owner of the Cannes Lions International Festival of Creativity) acquired the “commercial assets” of Effie, the organization behind the global Effie Awards, which rewards effectiveness in advertising. Effie will join Ascential’s Lions division, but its purpose, brand, and process won’t be affected.
- Marketing content platform **Contentful** acquired Berlin-based Ninetailed (to be re-branded as Ninetailed by Contentful), which specializes in structured content personalization and experimentation. The move intends to provide clients with a fully integrated, AI-native personalization solution paired with a robust composable content platform.
- Knoxville, Tennessee-based advertising agency **Tombras** acquired award-winning creative agency and Buenos Aires-based shop Niña in a move to expand the agency’s presence outside of the US. Niña clients include Bplay, Disney, ABInBev, Under Armor, and Bacardi.
- Bethesda, Maryland-based **MarketBridge** merged with four other marketing specialist firms—marketing agency Comm; Fama PR; marketing advisory company Quarry; and Intelisent—to create a new consultancy under the MarketBridge banner. Services now include go-to-market consulting, marketing and communications, marketing science, and technology solutions.
- **MindgruveMacarta** merged with Cincinnati-based Icon Commerce, the largest independent commerce agency in the Midwest, to boost the agency’s expertise in enterprise omnichannel commerce for clients such as P&G, Sony, Mattel, 3M, Colgate-Palmolive, DuPont, and Wrangler. The merger combines Icon Commerce’s physical in-store retail marketing experience with direct-to-consumer and marketplace expertise.
- **Acceleration Community of Companies** acquired a majority stake in New York-based marketing and communication agency DKC, with offices in Los Angeles, San Francisco, Albany, and London, and clients like TikTok, BMW, Airbnb, and Delta Air Lines, in a move to expand ACC’s portfolio of agencies (its sixth acquisition).
- **Reddit** acquired Memorable AI, which uses AI and machine learning to analyze human reactions and create more effective ads in-line with a broader range of elements, in a move to improve its ad targeting solutions.
- **Publicis Groupe** acquired Mars United Commerce, the world’s largest independent commerce marketing company. With over 1,000 employees based in 14 hubs worldwide, the shop has a proprietary suite of commerce solutions, including shopper intelligence capabilities, to help marketers make their products consumers’ top choice in online and offline shopper ecosystems.
- **WPP Group** acquired New Commercial Arts, a UK independent creative and customer experience agency that offers advertising, customer experience, PR, influencer, design, health, and consulting services. It will become part of the Ogilvy global creative network.
- **Havas** acquired data agency DMPG, which will be merged with Havas Media Network’s data, tech, and analytics consultancy, CSA. A certified partner of Adobe, Google, Tealium, and others, DMPG offers a suite of digital data technology services including customer experience strategy; digital analytics design, implementation and adoption; experience optimization program creation; and execution and omnichannel data activation support.
- **Stagwell** acquired Consulium, a pan-Middle East and North Africa government consultancy with capabilities including strategic communication, public policy, leadership support, and “diplomatic outcomes.” Offices are in Riyadh, Manama, Dubai, London, Cape Town, and Kuala Lumpur.
- San Francisco-based agency **Barrett Hofherr** acquired Funworks, an Oakland, California-based creative agency that incorporates sketch and improv comedy into its creative process for clients such as Clorox, Ubisoft, Amazon, Pinterest, Logitech, and ESPN.
- **Omnicom** and its Omnicom Precision Marketing Group acquired LeapPoint, a digital advisory firm focused on helping organizations improve the orchestration and performance of their entire marketing lifecycle (using AI, Adobe Content Supply Chain, and Workfront) in a move to offer the industry’s most comprehensive end-to-end content solution, with accelerated workflows and personalized experiences at speed and scale.
- Independent global media advisor **MediaSense** acquired R3, the creative and media agency consultant, in a move to expand the firm’s global footprint in North America and Asia beyond media operations into marketing operations, including content and creative. MediaSense and R3 will continue to operate under their existing brands.
- **Havas** acquired independent media agency and creative production company Hotglue as part of its strategic growth plans in the Australian market and to offer a more client-centric, audience-first, integrated approach.
- **Havas** acquired UK-based global digital data agency DMPG to support clients’ marketing transformations and unlock untapped value from advertisers’ data and technology investments. DMPG will join the organization under Havas Media Network’s data, tech, and analytics consultancy, CSA
- Brand consultancy-creative agency **50,000feet** acquired brand and communications firm Long Dash in a move to create brand narratives with a proprietary journalistic approach to research, strategy, and content development. Combined clients include BCG, Knoll, Mastercard, AbbVie, and Google.
- Global independent agency **Tombras** acquired The Burns Group, an independent advertising agency based in New York, in a move to strengthen Tombras’ capabilities with top consumer packaged goods clients.



- Marketing agency Haute merged with UK-based Fluid Branding, officially becoming Austin, Texas-based **Brand Revolution**, which now operates in EMEA, LATAM, APAC, and North America. The agency will offer brands worldwide buying power combined with global thinking and local execution capabilities for clients like Dell and Marriott.
- UK-based marketing group **MSQ** acquired SPCSH, the creative agency formerly known as Big Spaceship, with clients such as Starbucks, Dairy Queen, and PepsiCo, in a move to strengthen its presence in the US and capabilities in digital, data, and technology.

Payment terms and compensation

- **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.
- **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%.
- Kerry McKibbin of Mischief @ No Fixed Address, tackles “**9 Arguments Against Timesheets and for Modern Compensation Models**,” laying out ways for agencies to better structure payments. She first argues against “Timesheets are the only way to measure value.” She then dissects the following: “How do you manage pricing? Timesheets help us cost things out; How do you manage scope creep or change? What about benchmarking?; How do you forecast and recognize revenue without measuring effort?; How do you prevent passionate teams from going too ‘all out?’; How do you know if you’re going to be profitable?; But timesheets are a way to stay honest about lift; How do you show transparency to clients?; How can clients compare one agency with another if they don’t have a rate card or breakdown of hours?”
- **ISBA (Incorporated Society of British Advertisers)** entered a partnership with RightSpend to investigate remuneration trends. Their first project is to explore agency management and remuneration in the UK, including trends related to generative AI, martech, influencer marketing, and performance-related fees.

“Global advertisers must explore new innovative ways to empower their marketing teams and agency talent while realizing greater commercial and financial value from these strategic relationships”

Bruno Galpois Co-founder and Principal
Agency Mania Solutions



Noteworthy quotes

- » “We will find ourselves at the bottom of the barrel of ‘do more with less.’” —Tracey Pattani, CEO, **BSSP**
- » “I see a future where our industry is smaller, not bigger, and it’ll be more focused on high-value strategic thinking.” —Ralph Pardo, CEO of North America, **Omnicom Media Group**
- » “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**
- » “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**
- » “Feedback and remuneration both matter. Not just feedback. No one orders a pizza, eats half of it and then refuses to pay. Especially when they really wanted an ice cream. Remuneration helps focus the mind on whether you want a pizza or an ice cream.” —David Butler, Global Planning Director, **Leo Burnett**
- » “I think the most important element is every unit, every manager, every CEO understands that productivity is a core enabler to growth. So, it’s within the DNA.” —Andre Schulten, CFO, **P&G**
- » “We’re positioning Omnicom for that day where we can depend upon proving to our clients that we can improve their outcomes, and we should be paid differently for it. So that’s the mission and we’re on the path already.” —John D. Wren, Chairman and CEO, **Omnicom Group**



- » “You need to accept that transformation is more a mindset than a goal.” —Javier Meza, President, Marketing, and Europe CMO, **The Coca-Cola Company**
- » “Most agencies do pitches, including us. Sometimes we win, sometimes we don’t. What strikes me it’s how marketing directors underestimate the value of their post-pitch feedback and it strikes me even more when the work done during the process has not been remunerated.” —Andrea Stillacci, Founder and President, **Herezie**
- » “CMOs are living in an ‘era of less.’” —Ewan McIntyre, VP Analyst and Chief of Research, **Gartner**
- » “Ultimately the chosen remuneration model will dictate the type of relationships clients want to have with their agencies.” —Laura Forcetti, Director, Marketing Services Asia Pacific, **WFA**
- » “Without a compelling creative idea, you can have all the technology solutions in the world, but you got to compel the consumer to buy the product.” —Philip J. Angelastro, Executive Vice President and Chief Financial Officer, **Omnicom Group**
- » “The industry needs to shift the approach to remuneration to focus on the work with clients paying for deliverables and recognizing the need to also compensate for technology.” —Marla Kaplowitz, President and CEO, **4A’s**
- » “Value isn’t about time; it’s about great quality in the work relative to overall price.” —Kerry McKibbin, Partner and President, **Mischief @ No Fixed Address**
- » “With AI, we can start trending toward knowing instantly—knowing before it happens, not just when it happens.” —Jon Moeller, Chairman, President, and CEO, **Procter & Gamble**
- » “We often use the adage ‘fewer, bigger, better.’ We’re going to see a different approach—‘more, smaller, better.’” —Samantha Deevy, Chief Strategy Officer, **BBH USA**
- » “There’s a massive opportunity in going from what you call a media mix model to a true marketing mix model to understand the world.” —Kellyn Smith Kenny, Chief Marketing and Growth Officer, **AT&T**
- » “Flywheel opens an entirely new market opportunity for us. It has transformed us from an advertising and marketing company to a marketing and sales company.” —John Wren, CEO, **Omnicom Group**
- » “The CFO-CMO partnership is critical for success.” —Sharon Otterman, CMO, **Macy’s**
- » “Both brands and agencies must strike a balance between immediate objectives and long-term goals.” —Trina Roffino, CEO, **The Marketing Arm**
- » “The in-house agency team are incentivized in the same way that the product teams are incentivized—by the success of our product, not by the money that they get from their clients.” —Julia Goldin, Global Chief Product and Marketing Officer, **Lego**
- » “I would like to see less focus on expected results and more emphasis on unexpected results.” —Michael Chapman, Chief Client Officer, **The Martin Agency**
- » “We don’t do hours and rate cards because we strongly believe that that’s a race to the bottom.” —Kerry McKibbin, Partner and President, **Mischief**
- » “Pay attention to what creates value: Output without impact is irrelevant. Find ways to help drive results for the business, no matter what team you sit in.” —Lorraine Twohill, CMO, **Google**
- » “Why do we keep talking about how the agency model is broken? It’s not a model issue, it’s a value issue.” —Gregg Lipman, Founder and Partner, **CBX**
- » “Playing it safe is risky because it means you will never find out what works and what doesn’t.... Take risks and stick to your convictions.” —Marian Lee, Chief Marketing Officer, **Netflix**
- » “You just can’t have your head buried in the ground and expect Nirvana to prevail.” —Bob Liodice, CEO, **Association of National Advertisers**
- » “You can always do more with less if you’re scrappy and nimble and can take advantage of opportunities that come your way.” —Ryan Meegan, Chief Marketing Officer, **Dude Wipes**
- » “Your best source of revenue (not to mention referrals) will always be existing clients. Over-deliver, over-communicate, and focus on building relationships.” —Chris Mele, Managing Partner, **Siberia**
- » “Embracing g-AI-driven compensation models will enable more efficient, creative, and impactful marketing strategies, benefiting agencies and clients as they navigate this evolving landscape.” —Christine A. Moore, Managing Partner, **RAUS Global**
- » “90% of banner ads are fraud, and they don’t work.” —Marc Siegel, President of Sales, **Simul Media**
- » “Sometimes being brave means moving with speed and not letting budget stand in your way.” —Diana Haussling, SVP and GM of Consumer Experience and Growth, **Colgate-Palmolive**
- » “In a world where the marketing ecosystem is constantly evolving complex negotiations are now mandatory for both client and agency when it comes to determining transparency and ROI.” —Nick Sparey, Managing Partner, **Illumino Partnership**



Industry leadership reports

COMvergence: Major Concluded Global and Multi-Country Media Reviews – 2023

From our friends at COMvergence:

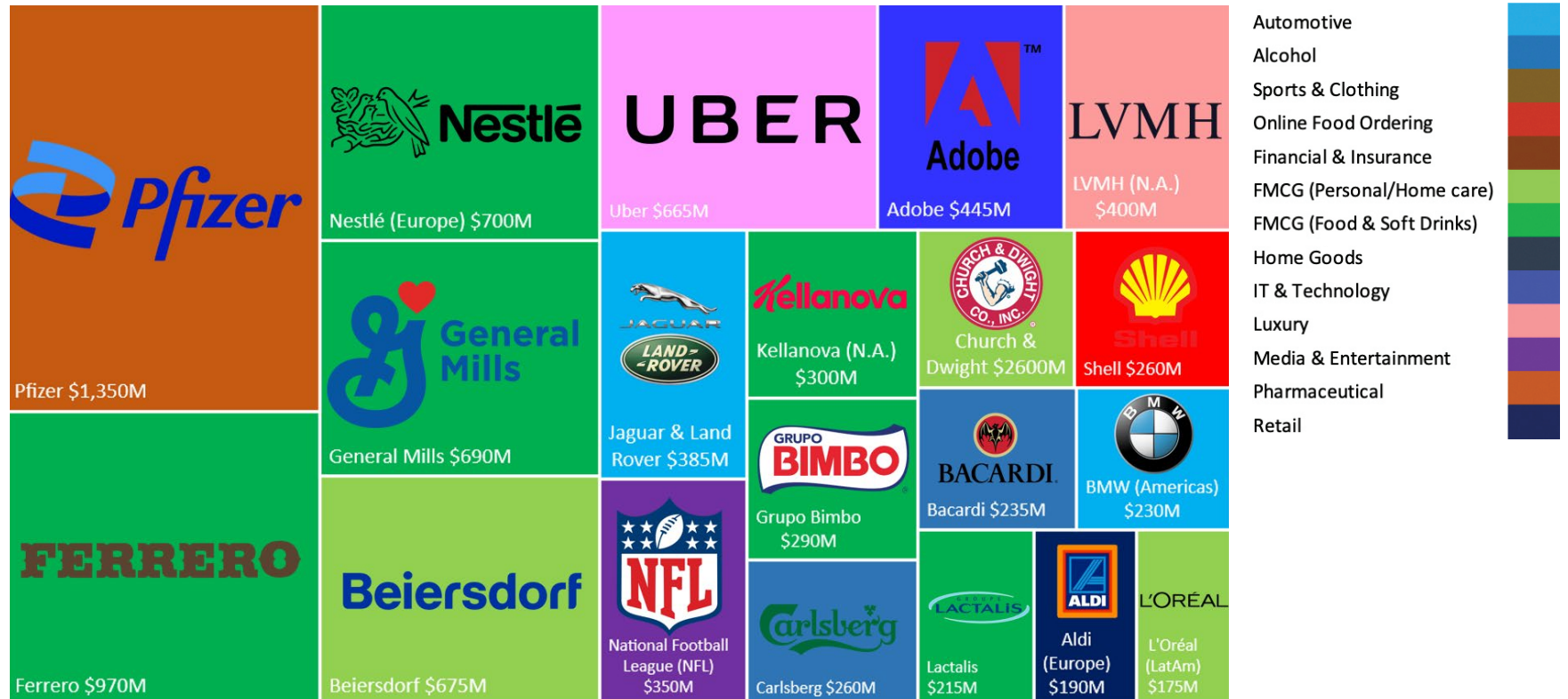
In 2023, COMvergence assessed 4,380 media account moves and retentions (≈ 2,790 advertisers total) in 48 countries, totaling \$35 billion (+9% vs. 2022). Local pitches represented 55% of the total reviewed spend amounting to \$19 billion.

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.

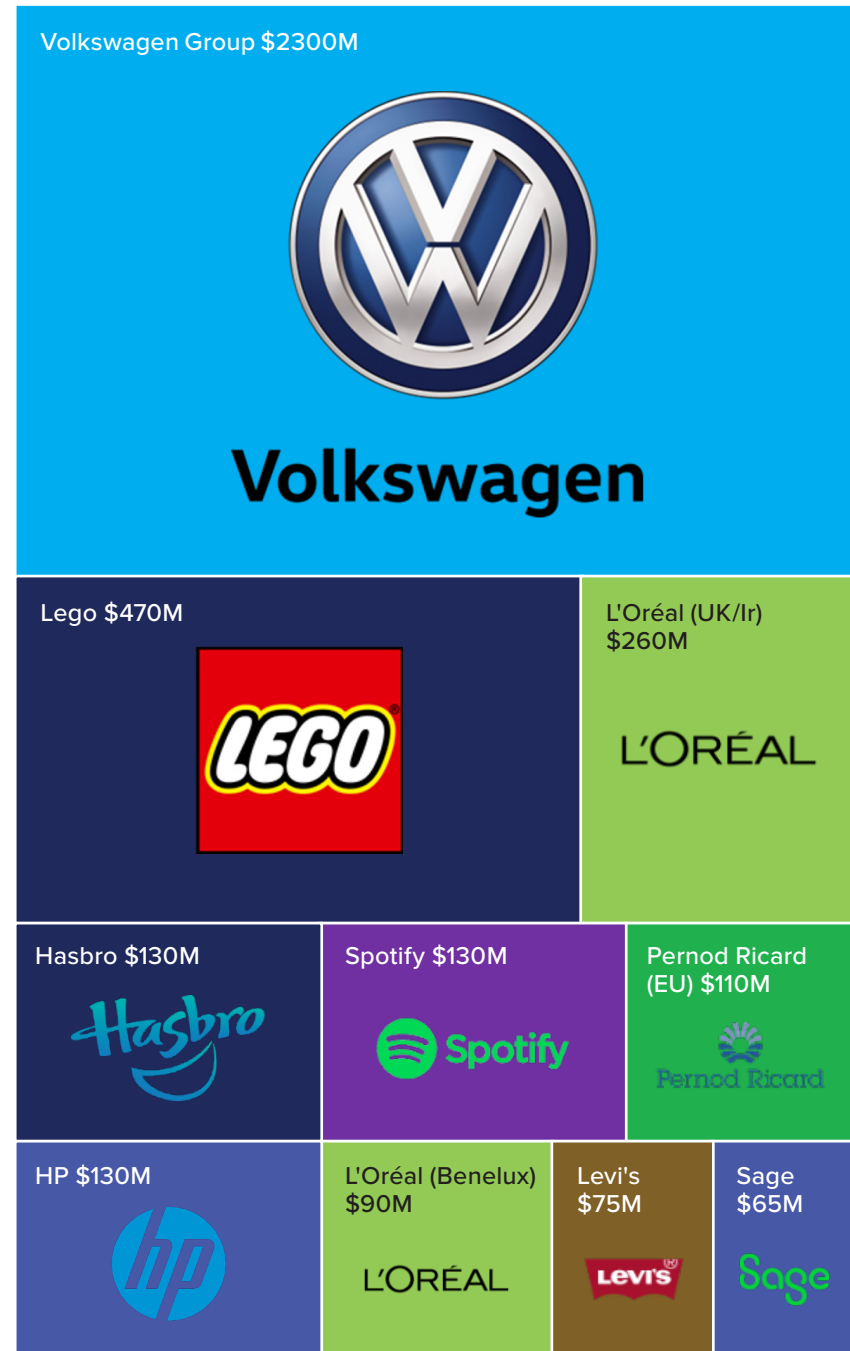
The largest global and multi-country reviews resulted in **\$16 billion**. The 20 largest reviews include:



COMvergence: Top 10 Global and Multi-Country Media Reviews – H1 2024

Takeaways and Insights:

- In H1 2024, COMvergence assessed more than 1,740 media account moves and retentions (1,210 advertisers in total) across 49 countries totaling \$16.4B (+14% vs. H1 2023). Pitches & Moves in the US represented 30% of the total spend reviewed globally, whilst China accounted for 21%.
- Local pitches represented 66% of the total reviewed spends, amounting to \$10.8B.
- Global & multi-country reviews concluded in H1 2024 resulted in a total of \$5.6B. These include Volkswagen Group (\$2.3B), Lego (\$470M), and Spotify (\$130M).
- The overall retention rate is 39%. PHD, Spark Foundry and OMD have been the most successful media agency networks to retain their client relationships after pitch, whilst OMG scored the best retention rate among the “Big 6” groups (89%).
- Of the total media spend reviewed in H1 2024, \$2.2B (or 13%) went to (or were retained by) independent agencies (not owned by the Big 6 groups) including Paramount Global in the US (\$430M, retained by Horizon Media) and Shanghai General Motors (SGM) in China (\$200M, won by some local independent agencies).
- PHD came out as the #1 global media agency network with a total new business value of \$3.3B including retentions for \$3.1B (Volkswagen Group representing 75% of the total retained billings). OMD ranks #2 with nearly \$1.5B of new clients wins and retentions (thanks notably to the consolidated win of GAP in the US (\$590M) and the retention of Mercedes-Benz Group in China (\$110M). Starcom takes the 3rd position, scoring the largest amount of new client wins (+\$1.2B), including Lego (\$440M) and Nestlé China (\$420M). In terms of NET new business results (excl. retentions), Starcom is the leader (+\$1.2B of incremental billings), followed by OMD (+\$769M) and Spark Foundry (+\$470M).
- At the group level, Omnicom Media Group (OMG) leads the NBB global ranking with a total new business value of \$5.3B (incl. retentions); whilst in NET, Publicis Media recorded the highest incremental billings figure with +\$2.4M. Also, GroupM ranks 3rd when including retentions (\$1.3B), whilst Havas Media Network completes the Top 3 groups in NET, with an overall new business gain of +\$275M.



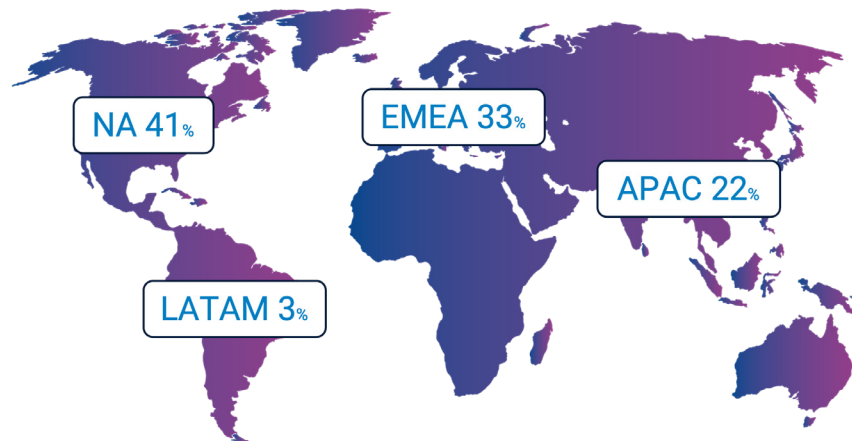
COMvergence: World's largest advertisers – 2023 total net media spend:

	ADVERTISERS	Global Media Spend 2023 in USD	Growth rate vs. 2022	Share of Digital Spend %
1	Procter & Gamble (P&G)	9B	+4%	46%
2	Amazon	5B	-3%	65%
3	Unilever	4.8B	-1%	50%
4	L'Oréal	4B	-1%	62%
5	Disney	3.3B	-3%	53%
6	Nestlé	2.8B	+10%	53%
7	Apple	2.7B	-3%	65%
8	Renault-Nissan	2.6B	+7%	50%
9	McDonald's	2.6B	+3%	40%
10	Coca-Cola	2.3B	-9%	48%
11	Google	2.2B	-13%	64%
12	Stellantis	2.2B	+8%	45%
13	Volkswagen Group	2.2B	+5%	54%
14	PepsiCo	2.1B	+5%	47%
15	General Motors	2B	-12%	42%

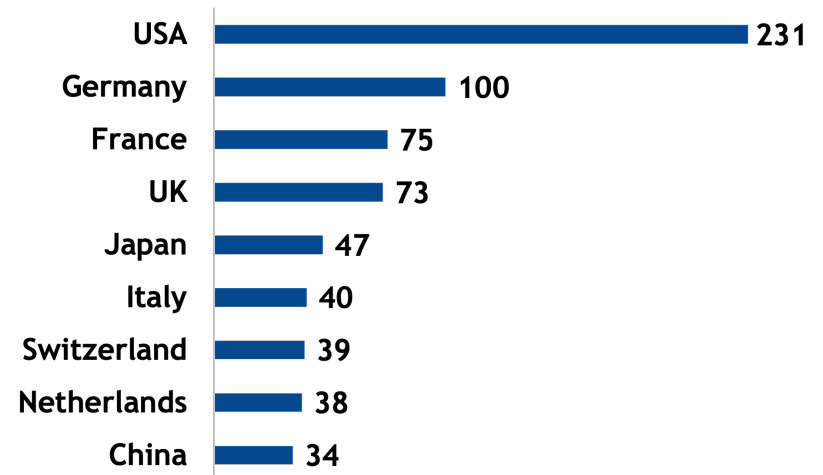
	ADVERTISERS	Global Media Spend 2023 in USD	Growth rate vs. 2022	Share of Digital Spend %
16	Reckitt	2B	+9%	41%
17	Mondelez	1.8B	+10%	52%
18	Ford	1.8B	+8%	60%
19	LVMH	1.8B	+11%	63%
20	Yum! Brands	1.7B	-1%	50%
21	Mars	1.7B	+10%	53%
22	Hyundai	1.6B	+6%	48%
23	Telekom Deutschland	1.6B	-3%	49%
24	Pfizer	1.5B	+13%	54%
25	Samsung	1.5B	-30%	64%
26	Toyota	1.5B	-14%	35%
27	GlaxoSmithKline	1.4B	+5%	37%
28	AbbVie	1.3B	+23%	27%
29	NBC Universal	1.3B	-12%	53%
30	Ferrero	1.3B	-11%	34%

The top 1,000 advertisers represent a total media spend of \$200B...

Which breaks out as follows:



With HQs in the following countries:

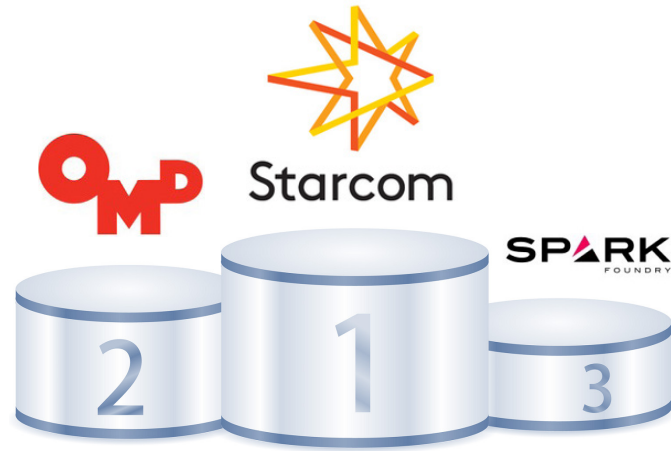


GLOBAL New Business Rankings – H1 2024 – Media Agency Networks

Total NBB Including Retentions



Total NET Excluding Retentions

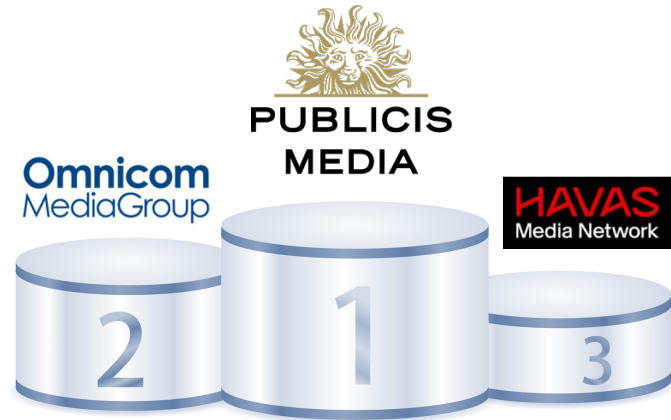


GLOBAL New Business Rankings – H1 2024 – Big 6 Groups

Total NBB Including Retentions



Total NET Excluding Retentions





R3: Global New Business Gains – 2023

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).

Learn More

Additional resources





Flagship solutions

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



ScopeDeliver™

Drive scoping efficiencies and optimize resources and decision making.

- Better transparency of agency-related costs, staffing, and marketing deliverables.
- Improved and simplified process of capturing, updating and monitoring scope/financial activities.
- Efficiency gains from improved SOW alignment and agency negotiations, informed by benchmarking, negotiation tracking and spend analytics.
- More effective use and ongoing management of agency and marketing resources.

Managing scopes and budgets is hard. We make it simple.



EvaluationDeliver™

Improve and strengthen agency relationships to yield better results.

- Simple and streamlined survey experience, enabled by automatic reminders, no password needed, and landing page for multiple surveys.
- Improved user satisfaction and survey participation due to a streamlined orchestration, robust process, participation tool and an approach that reduces survey fatigue and improved engagement.
- Meaningful insight extracted through real-time dashboards, client-ready insight presentations to tease out improvement areas, and action planning module to track progress and ensure full transparency.

Managing performance of agencies is difficult. We make it easier.



RosterDeliver™

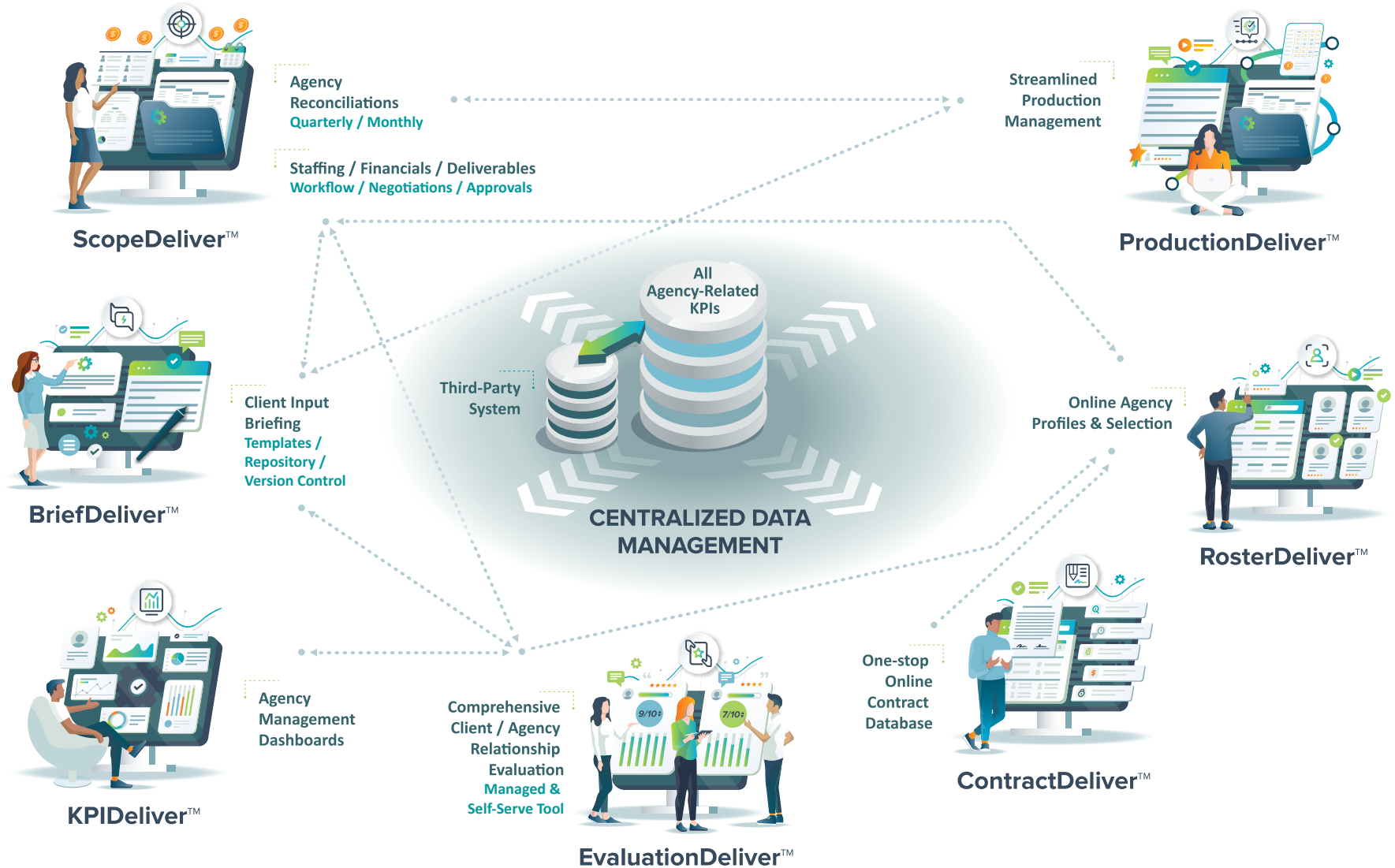
Tease out opportunities to maximize your agency investment.

- Anywhere access and reliable resource of your company's agency roster and marketing suppliers.
- Fast and effective selection of qualified partners with the right skill sets. Structured to enable partners to maintain their profile and clients to provide feedback.
- Guide to the highest-performing partners and increase economies of scale, while reducing/consolidating long-tail suppliers. Search by key attributes (e.g., DE&I) to meet internal targets.
- Improved internal compliance and governance occurs by guiding your sourcing and marketing organization to prioritize your preferred agency roster.

Managing a roster of agency and marketing supplier relationships is challenging. We make it easy.

An integrated approach to managing agency partnerships

Want to learn more about our enterprise SaaS technology? Visit agencymania.com or contact us at info@agencymania.com for more information.



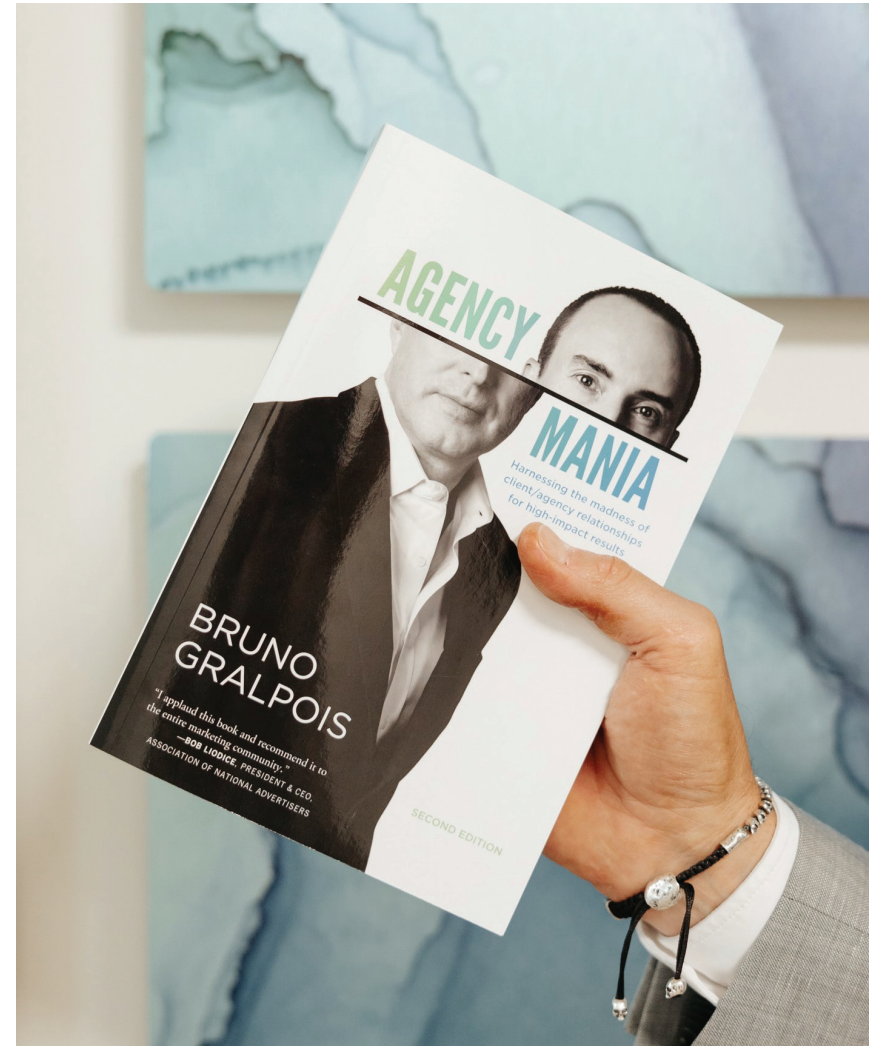


Agency Mania 2nd Edition

Named one of strategy+business magazine's **Best Business Books**.

The advertiser/agency relationship is under incredible pressure, and the future of the advertising industry is uncertain. The entire marketing ecosystem is being tested.

At a time of unprecedented change and complexity in marketing, *Agency Mania* will transform the way you look at client/agency relationships. It invites you to build sustainable partnerships that deliver unmatched work and results.



Scan for a copy of *Agency Mania 2nd Edition*:



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Agency Mania 2nd Edition is also available at many major bookstores: Amazon.com, Barnes & Noble, Target, and other retailers.



A word about the author: Bruno Galpois is a globally recognized thought leader in business partnerships, renowned for his pioneering work in establishing agency management as a critical discipline among the world's largest advertisers and Fortune 500 companies.

As the author of the industry-defining book *Agency Mania* and the co-founder of Agency Mania Solutions, a leading cloud-based software company, Bruno has dedicated his career to fostering successful client-agency relationships. His expertise, honed through leadership roles at Microsoft, Visa, and several pre-IPO software companies, has made him an authority on building and nurturing high-impact business partnerships.

In addition to his corporate achievements, Bruno is a key Faculty member at the Association of National Advertisers (ANA) School of Marketing, where he continues to shape the future of client-agency collaboration, driving growth and sustained business performance.

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

Readers love our bimonthly Industry Updates:



I always look forward to these Industry Updates! This industry is ever changing and it sometimes feels overwhelming to keep up with, this simplifies all of the updates. I love that it makes us look like rockstars to our marketing stakeholders, too.”

Effie Katsoolias, Senior Manager, Agency Management,
Discover Financial Services



I’ve been following these industry updates for years, and they never disappoint. It’s like having a VIP pass to the latest developments and must-know trends, keeping me ahead of the curve on the key market shifts that are shaping our industry. The takeaways are always timely, relevant, actionable, and incredibly valuable.”

Cathy Stanley, Agency Management Advisor, **PayPal**



Great stuff always!
Looking forward to next issue!”

Christine A. Moore, Manager Partner, **RAUS Global**



The AMS Ad Industry Updates is an invaluable resource. It provides a concise and insightful overview of the key trends and developments shaping our industry, saving me countless hours of research. A must-read for any agency professional.”

Lorenzo Greco, Senior Director, Sales, **MediaOcean**



An indispensable synthesis of the industry,
a must-read.”

Carol Mason, Managing Director (NY), **AdForum**



A consolidation of bimonthly Industry Updates, recapping industry developments in areas of talent, work and performance, and financials.

Includes agency reviews, roster changes, and contributions from industry partners.

For more information or to request a demo of Agency Mania Solutions' capabilities, please contact:



Bruno Galpois

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Disclaimer: This annual AMS Industry Update booklet provides a summary and analysis of noteworthy client-agency developments gathered from recent trade-related publications and news media. The information presented is based on publicly available sources and should not be considered exhaustive.

If others in your organization are interested in receiving Industry Updates, please let them know that they can sign up on our website at: agencymania.com/contact/newsletter-signup. If you have any comments or would like to update or change your contact information, please contact us at: info@agencymania.com.