

Industry Update

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

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Contributed by Piscari Ltd.

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EXECUTIVE SUMMARY: November - December recap

Geopolitical events, international hostilities, terrorism, public health crises, high and sustained inflation in countries that are our major markets, high interest rates, and labor and supply chain issues continue to cause economic uncertainty and volatility.

That is how most holding companies start conversations about their earnings and financial performance. It's not just a disclaimer for investors.

This is the reality of our economic environment, and it is a source of concern and, well, maybe it should be just that. We are getting ready to wrap up an insanely volatile 2024. And 2025 might be full of surprises as well. The US presidential election is now behind us and an abundance of opportunities lies ahead, or at least optimism. Validating this feeling are economic projections, spending levels of large brand advertisers, excitement about AI, and the overall health of the advertising sector.

It's up to us to some extent. François Guizot, a prominent French political figure and historian in the era before the Revolution of 1848, said it best: “The world belongs to optimists. Pessimists are only spectators.”



Bruno Galpois
Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources



“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?

• 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

• 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

- 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.
- **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.
- 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.
- **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.
- 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

Looking for a better marketing partnership management solution?

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

Visit agencymania.com/partnership-management-software to see what our Agency Partnership Management Software can do for you, ad agencies, and suppliers.

Customized SaaS Solutions

Partnership Management Lifecycle

AGENCY MANIA SOLUTIONS

New agencies or capabilities, restructurings, and reorganizations

- 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.

AI (artificial intelligence)

- 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 HypeAuditor, 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%).
- 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

- 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

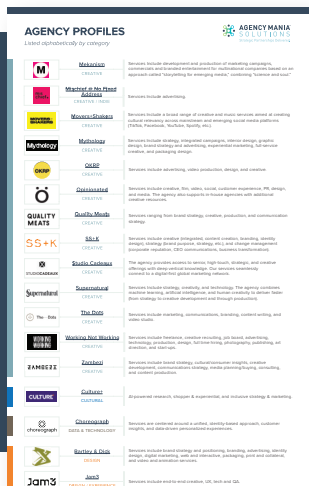
Responsible advertising (diversity and inclusion, environment, etc.)

- **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.

Company profiles:

- **Iris Worldwide** 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 Connec+, a global collective of agencies including Barbarian, BMB, Cheil, CYLNDR, and McKinney.

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



- **Eversana Intouch** 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.
- **The Client Relationship Consultancy** is an independently owned client-relationship consultancy focused solely on agency relationships, with offices in London, Boston, Munich, and Sydney. The firm works with large global agency networks and independents across the marketing services spectrum, including advertising, PR, digital, and media, to help them leverage their relationships for growth, morale, and margin. Based on 550,000 pieces of client feedback, they use data to provide precise and accurate diagnoses that inform relationship strategies for growth and outcome-driven action planning. The firm’s mantra: “What if your agency had access to an outsider with insider knowledge?”

Noteworthy quotes:

- » “Is Paul McCartney efficient? No one cares, because that’s the wrong question. The right question for knowledge workers is, “Are you effective?” Our industry’s relentless focus on ‘billable hours’ has us looking through the wrong end of the telescope.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “The jargon that we endure in our industry is head-spinning and mind-numbing. You need a PhD to understand the acronyms and jargon. Marketing can be complex, but it doesn’t need to be complicated.” —Marc Pritchard, Chief Brand Officer, **Procter & Gamble**
- » “Of the 90+ behaviours that contribute most to a client’s satisfaction with their agency, creative work sits at number 42. That’s not because great creative work doesn’t matter. It does. However, clients can love the work, but not the agency. In fact, creative work is the top area praised even by those clients who rate their agency relationship poorly. Time and time again, we see agencies hired for their ideas and fired for their relationships.” —Anna Hopwood, Head of Consultancy, **Client Relationship Consultancy**

- » “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**
- » “The dictionary definition of partner implies some kind of vested interest. A true partner has some skin in the game. You take responsibility for solving problems that connect to outcomes. By contrast, the current agency business has become too transactional.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “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**

WHITE PAPER: The Trust Builder: Why Building Rapport Beats Hard Bargaining in B2B Sales Negotiations

Contributed by: Piscari Ltd.

In the competitive world of B2B sales, strong negotiation skills are essential for securing favorable deals while maintaining solid client relationships.

Negotiating based on value requires a deep understanding of the client’s business, their pain points, and how the product or service can address those issues.

Sales negotiators approach the bargaining table with different strategies, often shaped by their own instincts and experiences.

So, what sets top negotiators apart from the rest?

Want to read more? [Download the full white paper.](#)

The Trust Builder: Why Building Rapport Beats Hard Bargaining in B2B Sales Negotiations



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



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.

- 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.
- 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.
- 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

- **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.
- 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.

Awards

- 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.

Noteworthy quotes:

- » “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 sausage-making.” —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**
- » “Defend creative ideas. We’re marketers, after all.” —Marian Lee, Chief Marketing Officer, **Netflix**
- » “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 a new podcast?

Check out **Higgle's podcast session** with Agency Mania Solutions' Co-Founder and Principal, Bruno Galpois.

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

HIGGLE:
THE B2B SALES CLUB

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

FINANCIALS: Driving efficient use of resources



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. For a comprehensive view of the world's 15 largest agencies, download our [free 2024 Top Agencies poster](#).

- 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.
- 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.” [Download the full report](#).
- 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 **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%.
- 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%).
- R3's Agency Benchmarks** are based on an aggregated cost of more than 300 creative (40%), media (28%), digital/social (20%), and specialist agencies, and over \$1 billion in fees covering more than 10 categories in 50 countries. The data is used to evaluate agency proposals based on resource and time commitments against specific needs, service expectations, and outlined scope of work.
- 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%).
- London-based **S4 Capital** continues to struggle. The holding company reported a double-digit revenue decline in Q3 2004. Net revenue was down 15.2%, with an organic revenue decline of 12.6%.
- 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.

Holding company financial performance

- **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.
- **Omnicom Group** 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.
- **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.
- **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.

- To recap Q3 FY24 results of the top four holding companies, excluding Accenture Song (part of Accenture), Dentsu, Deloitte Digital, Havas Group (part of Vivendi), Stagwell, S4 Capital, and others:

Holding company	Stock Symbol	FY24 Q3 Revenue	FY24 Q3 Organic Growth	FY24 Q3 EBITA Margin
WPP Plc	WPP (NYSE)	\$4.6B	0.5%	16%
Omnicom Group	OMC (NYSE)	\$3.9B	6.5%	16%
Publicis Groupe SA	PUBGY (OTCMKTS)	\$3.7B	5.8%	18%
Interpublic Group (IPG)	IPG (NYSE)	\$2.6B	1%	17%

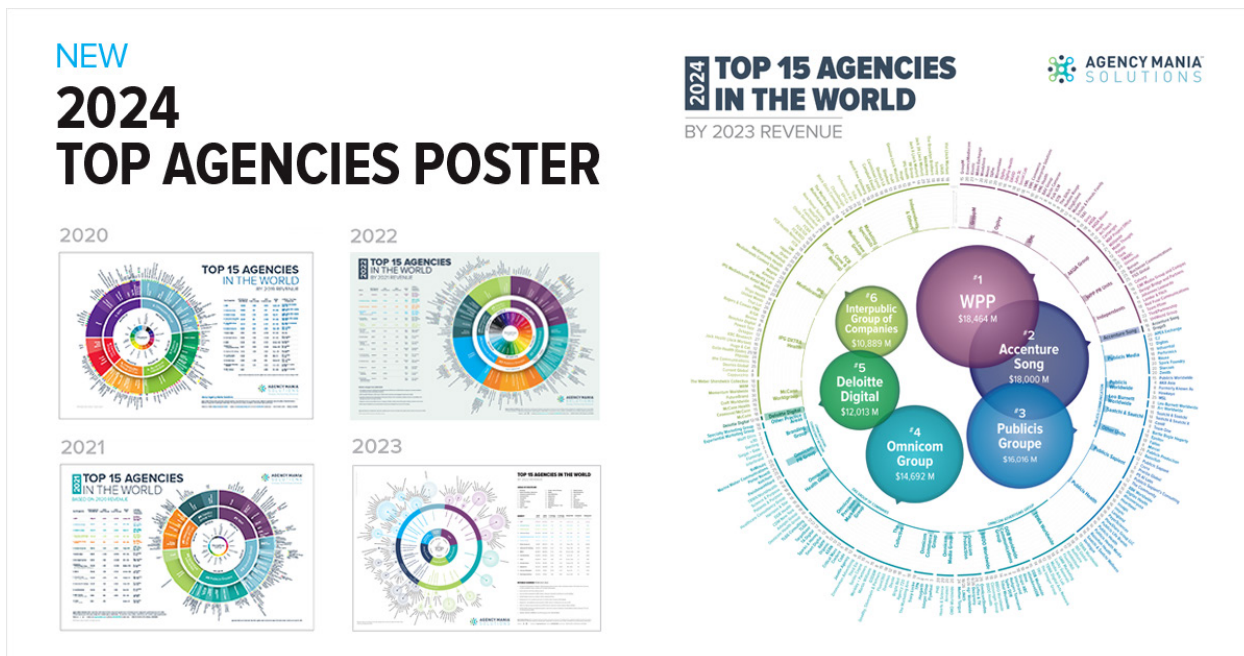
Mergers and acquisitions (M&A) activity

- 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 SPCSHP, 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.

Noteworthy quotes:

- » “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**
- » “Holding companies serve two masters: Wall Street and agency clients. Are Wall Street’s needs being pursued (ineffectively) at the expense of client needs for growth?”
—Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “You just can’t have your head buried in the ground and expect Nirvana to prevail.”
—Bob Liodice, CEO, **Association of National Advertisers**
- » “Sell the meal, not the ingredients or the labor required to prepare it.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “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**
- » “Too many firms are now operating as fast-food restaurants, taking orders in the form of client briefs, rather than offering the type of top-down problem-solving that built the foundations of the agency business.” —Tim Williams, Founding Partner, **Ignition Consulting Group**

- » “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, **SimulMedia**
- » “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**
- » “Unless you intend to compete solely on price (not a great business strategy), your firm’s goal must be to create a suite of programs and products that exist nowhere else—solution sets that are literally a breed apart.” —Tim Williams, Founding Partner, **Ignition Consulting Group**



Check out our poster “**2024 Top 15 Agencies in the World**,” a visual that captures the largest global agencies based on 2023 revenue. We break down and rank the notable agencies (and networks) for the top 6, detailing the revenue for the top 15, change year-over-year, and other key information (HQ, worldwide scope, size).

AGENCY: Agency reviews and roster changes







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

- 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.
- 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.
- 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.
- Engineering and technology services giant **Bosch** selected Germany's Mediaplus (part of agency group Serviceplan) as its 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.
- **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.
- Stamford, Connecticut-based cable and internet provider **Charter Communications**, which operates as Spectrum, kicked off a review of its creative and media business. The brand partners with a range of agencies including Dentsu's iProspect, indie creative shop Something Different, indie media agency PMG, and Camelot.
- 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.
- 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.
- 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.
- 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.
- 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.
- 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.
- **Kimberly-Clark** launched a review of its global creative and media business, which includes brands such as Kleenex, Huggies, Scott, Poise, and Cottonelle. As part of the company's Powering Care strategy, the brand is looking to consolidate work with a holding company offering and is excluding the US from the media business.
- 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.

- Consumer packaged goods conglomerate **Mars** kicked off a review of its global agency business focused on Mars Snacking (M&Ms, Snickers and Wrigley’s) and Mars Petcare (Pedigree, Cesar, and Royal Canin) in an attempt to reduce the size of its agency roster and consolidate work across media, commerce, social media, brand PR, and influencer marketing (creative is out of the scope).
- 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.
- 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.
- St. Louis-based fast-casual chain **Panera Bread** kicked off a review of its creative business. Four-year incumbent Mother New York will not defend.
- **Royal Caribbean International** kicked off a review of its creative business. Incumbent Interpublic Group’s The Martin Agency is not defending. IPG Mediabrands agency Mediahub remains the media AOR.
- 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.
- Telecommunications giant **T-Mobile** kicked off a review of its social media business for its T-Mobile and Metro by T-Mobile brands. Social media work is currently handled by a variety of agencies on its roster, including Dentsu Creative (its US creative AOR) and VML (its CRM and influencer AOR).
- 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.
- 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).
- The **United States Marine Corps** retained WPP’s VML following a mandated review (Wunderman Thompson held the account for 77 years). The agency will continue working with its 200-person bespoke team called Thompson. The new contract is worth \$1.9 billion over 10 years.
- **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.
- 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.

Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Adobe	Unk	Lead Creative, Digital Media	Global	Stagwell	Y
	Adobe	Unk	Lead Scaled Creative & Content, Digital Media	Global	Dentsu Creative	Y
	Adobe	Unk	Creative, Digital Experience	Unk	Omnicom Group	Y
	Amgen	Hearts & Science, GroupM	Media AOR	US	Mediabrand	Y
	Andriani	Unk	Creative AOR	US	StrawberryFrog	Y
	Bimbo Bakeries	Unk	AOR	US	Landor	Y
	Bonchon	Propaganda	Creative & Strategy AOR	US	Carson+Doyle	Y
	Bosch	Carat	Media AOR	EU, Various Others	Mediaplus	Y

Agency roster summary:

IP= Review in Progress, Unk= Unknown

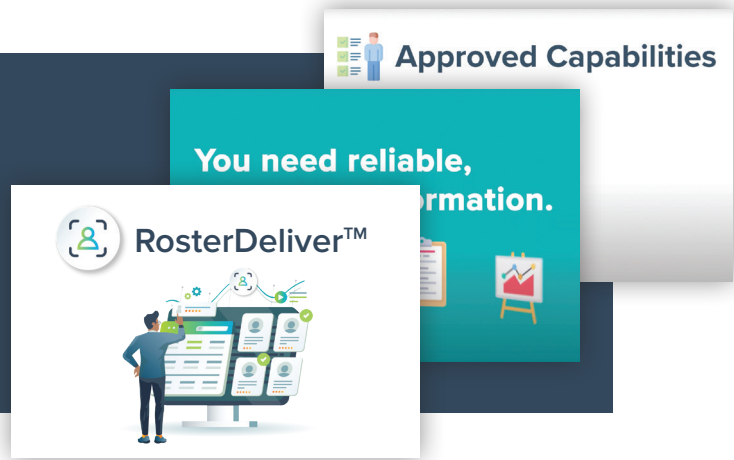
COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	California Pizza Kitchen	<i>None/In-house</i>	Creative & Social AOR	US, Global	Iris Worldwide	Y
	California Pizza Kitchen	Unk	Special Projects	Unk	Push	Y
	California Pizza Kitchen	Unk	Performace Media	Unk	Acadia	Y
	California Pizza Kitchen	Unk	PR	Unk	Blue Engine	Y
	Carlsberg Group	<i>Expanding work beyond iProspect</i>	Social Media AOR	Global	We Are Social	Y
	Charter Communications (Spectrum)	<i>Various Agencies</i>	Creative & Media	Unk	IP	Y
	Columbia Sportswear	Unk	Creative AOR	Global	adam&eveDBB	Unk
	Culligan	<i>None</i>	Brand Platform & Campaigns, Creative	Global	Highdive	Y
	Designer Shoe Warehouse	<i>Various Project-Based Agencies</i>	Creative AOR	Unk	Crispin	Y
	Empower	Pereira O'Dell	Creative AOR	Unk	Goodby, Silverstein & Partners	Y
	Goldfish	Saatchi & Saatchi, Leo Burnett	Creative AOR	Unk	Mischief @ No Fixed Address	N
	H&R Block	Unk	CRM AOR	Unk	Ogilvy One	Unk
	Kimberly Clark	Unk (consolidation)	Creative & Media	Global	IP	Y
	Little Caesars	Horizon	Media AOR	US	Mediahub	Y
	Mars (Mars Snacking, Mars Petcare)	Unk (consolidation)	Media, Commerce, Social, PR & Influencer Marketing	Global	IP	Y
	MOD Pizza	Unk	Media & Social AOR	US	Cramer-Krasselt	Y
	Moderna	Hearts & Science	Media AOR	Unk	Known	Unk
	Panera Bread	Mother New York (not defending)	Creative	Unk	IP	Y
	Royal Caribbean International	The Martin Agency (not defending)	Creative	Unk	IP	Y
	Starbucks	SPCSHP	Creative	US	WPP	Y
	T-Mobile (T-Mobile, Metro by T-Mobile)	<i>Various Agencies</i>	Social Media	Unk	IP	Y
	Tree Hut	<i>In-house, Various Project-Based Agencies</i>	AOR	Unk	Bakery	Unk
	TruGreen	Unk	Lead Creative & Social AOR	Unk	VML	Y
	United States Marine Corps	<i>None</i>	Full-Service	US	VML (retains duties)	Y
	Wyndham Hotels & Resorts	Unk	Consumer Marketing AOR	NAM	Havas	Y
	Zalando	Unk	Media AOR	Global	Crossmedia	Y

Need to manage your Agency Roster?

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

There is a better way.

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



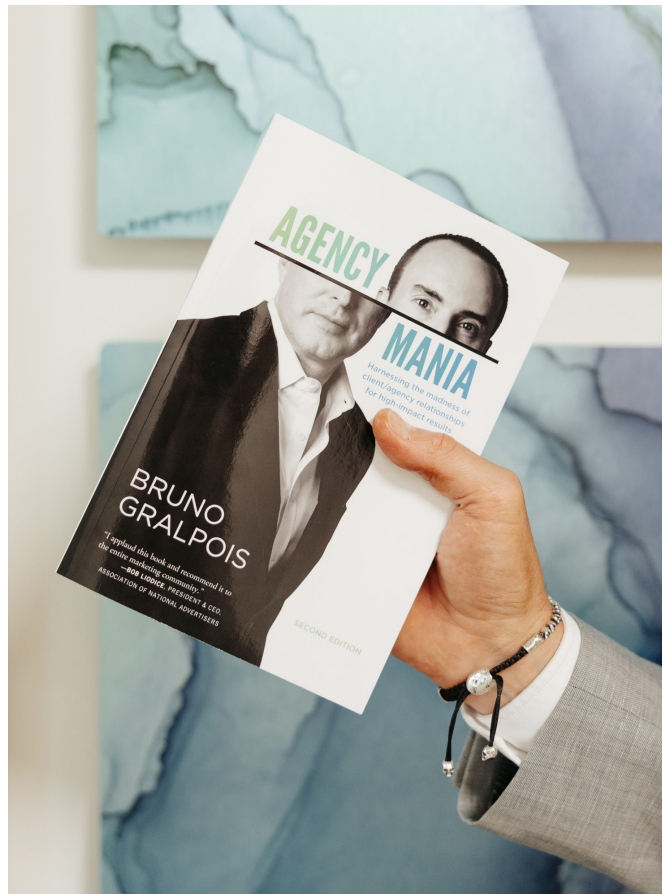
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A word about the author: Bruno Galpois is a globally recognized thought leader in business partnerships, renowned for his pioneering work in establishing agency management as a critical discipline among the world's largest advertisers and Fortune 500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