

Industry Update

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

January - February 2025 | Volume 80



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ARTICLE: The Truth about Gen AI

Contributed by: Claire Randall Consulting

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EXECUTIVE SUMMARY: January - February recap

Hello, 2025! The race is underway. In the US, the newly elected president declared a new "golden age" across the board, including the nation's economy. "Sorry, Mad Men. The Ad Revolution Is Here." was the headline of a Wall Street Journal article announcing the merger of advertising giants Omnicom Group and Interpublic Group of Cos., bringing together over 100,000 employees to form the largest agency in the world. That's right. The biggest agency deal ever and the largest holding company in the world. The new entity will be called Omnicom.

Whether you are a brand advertiser, a small agency, a big agency, or a platform provider, this megamerger will likely affect you at some level. The move has strategic benefits to the two players. With a combined \$26.5 billion in revenue, the two holding companies will merge their talent, investments, budgets, and technology to become a powerhouse with some of the largest agency brands under one roof.

The merger is also expected to drive \$750 million in cuts, ranging from back-office consolidation and adjustments in vendor partnerships and real estate. Both companies have much to do to make the merger happen, pass regulatory approval, and create shareholder value, without being a source of major distraction to their clients, and without losing key talent in the process. We will be watching with great attention how the marketplace and clients respond.



Bruno Galpois

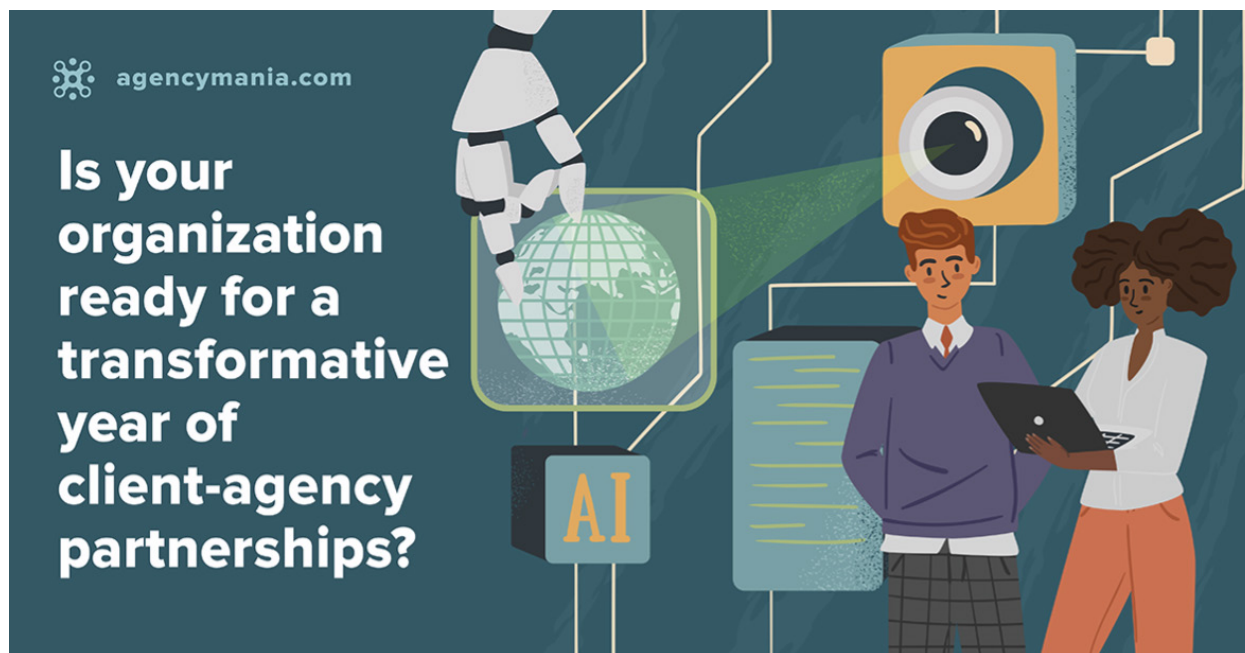
Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources

No doubt the advertising world is in rapid transformation. The best way to predict the future is to invent it. It's not just AI, it's the massive investment in technology and infrastructure by tech advertising giants like Google and Amazon. For example, Meta, the parent of Facebook, Instagram, and WhatsApp, is planning to build a 40,000+-kilometer fiber-optic subsea cable around the world, at an estimated cost exceeding \$10 billion. The cable, of which Meta reportedly would be the sole owner and user, would span from the US East Coast to India via South Africa and then to the US West Coast from India via Australia. More details about the plan are expected in early 2025. The cable would provide Meta with a dedicated pipe for data traffic around the world. This is just one example of companies investing in massive capabilities that go beyond our traditional understanding of what constitutes marketing and advertising.

- Per **CMO Barometer** (from the University of St. Gallen and Serviceplan Group), 48% of CMOs believe AI and marketing automation will be the most important topic to consider in 2025, followed by digital transformation of marketing and tools (9%). 81% want to prioritize the use of AI in marketing processes. 37% anticipate an increase in their marketing budgets, with 7% expecting an increase of more than 10%. CMOs want creativity and out-of-the box thinking from their agencies (71%), followed by innovation and new ideas (63%) and proactivity (54%).

- Per the World Federation of Advertisers (WFA), **five predictions for 2025:**
 - 1) Retail media nears maturity
 - 2) Balancing sustainability commitments with business realities
 - 3) A year of reckoning for food and alcohol marketing
 - 4) Tech will sharpen the focus on people and culture
 - 5) Back to fundamentals (again)
- Cable and entertainment giant **Comcast** decided to move some of its work in-house as the company is shifting priorities and spinning off cable TV channels, including MSNBC, CNBC, and USA. The move led two-decade incumbent Omnicom agency Goodby Silverstein & Partners to reduce its staff.
- Independent agency network **Worldwide Partners** added eight new agencies to boost the network's creative, experiential, retail, and Hispanic marketing capabilities while expanding its footprint. The eight firms are full-service creative commerce agency Blue Chip (Chicago), full-service financial services and luxury agency Solve (Minneapolis), Lure (Germany), data strategy, media planning and buying, and vertical expertise firm Mediassociates (Sandy Hook, Connecticut), VMG (Dallas), US Hispanic audience network Digo (New York), influencer agency Sway Group (Mills Valley, California), and digital-first agency Propel (Philippines).



Check out our article "**The Marketing Procurement Renaissance: Redefining Value and Innovation in a New Era of Relationship Capital**," featured on Forbes.com. Agency Mania Solutions' Co-Founder and Principal, Bruno Gralpois, shares key insights from the 2024 ProcureCon Marketing event, highlighting top takeaways from engaging discussions and expert speakers!

- Do clients still care about competitive conflicts? Per Ad Age, **eight potential client conflicts** were identified as part of the Omnicom-IPG merger:
 - 1) Alcohol: Constellation Brands (IPG) and Diageo (Omnicom)
 - 2) Finance: American Express (IPG) and Wells Fargo (Omnicom)
 - 3) Food: Ferrero (IPG) and Mars (Omnicom)
 - 4) Insurance: Geico (IPG) and State Farm (Omnicom)
 - 5) Personal Care: Kenvue (IPG) and L'Oréal (Omnicom)
 - 6) Pharmaceutical/healthcare: Bristol Myers Squibb (IPG) and Boehringer Ingelheim (Omnicom)
 - 7) Streaming: Netflix (IPG) and Disney+ (Omnicom)
 - 8) Telecom: T-Mobile (IPG) and AT&T (Omnicom)
- Omnicom Media Group (OMG)** was named a "Leader" among 12 global media management services providers in a new analysis from leading research and advisory firm Forrester. It's based on 22 criteria. The analysis referenced OMG's ability to carry audience intelligence through media planning, buying, and activation—and into scaled, near-real-time creative campaigns.
- Per **The CMO's Playbook for Marketing Technology** from the Association of National Advertisers (ANA), key success metrics to build and lead high-performance teams who deliver on the promise of marketing technology: training rate, time to competency, recruiting success, retention rates, collaboration impact, marketing tech ROI.
- Per **Dentsu's CMO Navigator report**, the vast majority of global CMOs report that media is being elevated into a very important (68%), if not critical (20%), driver for the growth of their business.
- Brands are experimenting with creative ways to **search for and find new agency partners**. Per Ad Age, Snack brand Feastables searched for a creative agency by simply posting on LinkedIn, skipping the traditional pitch process, and stating that the brand is "not running an RFP." It asked agencies to message the company directly. The post generated 200 messages from agencies in less than one week. Heineken did a similar campaign in the UK, receiving over 1,000 messages.
- Per Mercer Island Group, 21 mistakes marketers can avoid in their next **agency review**:
 - 1) No clear objectives
 - 2) No clear process
 - 3) Frequent changes in direction
 - 4) The wrong field
 - 5) Too large or too small a field
 - 6) Incomplete briefing
 - 7) No NDA
 - 8) No budget
 - 9) No SOW
 - 10) No MSA
 - 11) Poor Q&A and limited information sharing
 - 12) No work session
 - 13) Poor feedback
 - 14) A process that is too long or too short
 - 15) Requiring finished work
 - 16) Buying the shiny object
 - 17) Forgetting about chemistry and culture
 - 18) Not checking references
 - 19) No thorough onboarding of the new agency
 - 20) No disciplined transition process
 - 21) No plans for an annual 360
- Per search consultant Setup, only 40% of advertisers **planned to switch agencies** in 2024 compared with 55% in 2023, a 15% decrease YOY and close to the 2022 level (38%). Though fewer clients are switching agencies, 68% said they planned to review their agency partners by the end of 2024. 55% of advertisers prefer specialist agencies over generalists. 44% reported bringing more marketing functions in-house. 80% were leveraging AI primarily for content creation, operational efficiency, personalization, and research.
- Per Campaign US, the **power of procurement in agency pitches** is growing (+26.9%), but mostly the same as a year ago (65.4%): The role of procurement in agency selection "remains crucial as cost-cutting becomes a greater focus and clients take more searches internally."
- Amazon Ads** launched a new product called Amazon Retail Ad Service, allowing retailers to use Amazon's tools such as ad technology and machine learning models built on AWS to sell product ads appearing on their e-commerce sites. The service competes against retail ad tech firm Criteo and Publicis Groupe-owned Epsilon, among others.

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Better Use of Time and Resources



Independent Professional Perspective

New agencies or capabilities, restructurings, and reorganizations:

- **Publicis Groupe** merged Leo Burnett and Publicis Worldwide to create Leo, a creative unit (aka “creative constellation”) comprising more than 15,000 employees in 90 countries, with the aim to bridge creative human craft with data and technology.
- WPP media network **GroupM** restructured the agency in a move to unify its media agencies around central teams and capabilities. The new leadership team will oversee global operations and multinational clients for Mindshare, EssenceMediacom, and Wavemaker.
- The largest independent media agency globally, **Horizon Media**, launched its full-service creative agency, One Horizon. Operating as part of Horizon Media, the agency integrates technology, data, and creativity under one roof, in a move to expand multidisciplinary work with existing clients. The agency will partner with specialty divisions such as 305 Worldwide (multicultural), HS&E (sports and experiences), First Tube (digital experiences), Blue Hour Studios (influencer marketing), Night Market (commerce agency), and Green Thread (B2B).
- Ad agency **A&G** launched a stand-alone, tech-focused, data-driven CRM agency, CeCo Digital, to help brands retain and grow customers. The new firm’s approach unites communication, CX, and loyalty capabilities to design and launch digital products like customer portals.
- Marketing agency **Fastlane** launched a specialist shop, FitVisible, to focus on the fitness, health, and wellness categories. The agency is designed to help startup and early-stage players. The wellness economy reached a record \$6.3 trillion at the end of 2023, according to the Global Wellness Institute.
- Vancouver, BC-based **Rethink** launched a full-service public relations offering as an extension to its advertising business. The agency has already been recognized for PR work, including a Gold in Strategy’s PR Agency of the Year program and a PR Campaign of the Year for Molson Coors’ “See My Name.”
- Interpublic Group of Cos.’ **Weber Shandwick** launched a “creative intelligence advisory” unit, Weber Shandwick Creative Intelligence Partners, designed to help CMOs, brand marketers, and agencies evaluate risk before their creative launches to the public. The unit will handle crisis communications, corporate and public affairs, and social impact.
- Creative agency **Mischief @ No Fixed Address** expanded its offering to include media planning and buying (comms planning, strategy, buying, analytics, and measurement) to deliver a more integrated solution to clients. Stand-alone media clients include Supercell and Duolingo.

AI (Artificial Intelligence):

- Banking giant **Goldman Sachs** reported that 6.1% of American businesses were using AI for product or service production at the end of 2024, up from 5.9% in Q3. Companies with more than 250 employees had an adoption rate of 10%. 65% of CFOs cite limited ROI as a drawback to implementing AI across their organizations.
- AI continues to exhibit a remarkable influence on marketing. As such, the **ANA** named AI the Word of the Year in 2024 for a second consecutive year. It was selected by 65% of its members, followed by personalization, a distant second choice.
- **Procter & Gamble** revealed that the company is investing in automation technology and AI to bolster operations across several areas of business, including media, marketing, and production. The brand giant uses generative AI for concept ideas and then tests copy against thousands of in-market copy, and also automates media scheduling through algorithms. The automated process aims at cutting down the testing timeline from several months to just a few days and reducing costs.
- **Publicis Sapient** built a global partnership with Google Cloud to accelerate its adoption of generative AI. As a result, Publicis Sapient will create a dedicated Google Cloud business unit to address client demand for Google’s AI technology, with dedicated resources to help customers plan, deploy, and manage generative AI projects.
- Per P&G’s Signal360, **four ways to better collaborate with AI:**
 - 1) AI requires a new kind of literacy
 - 2) Harness AI to increase productivity
 - 3) Invite AI to brainstorm
 - 4) Check AI’s work as you would with any collaborators
- **Dentsu** used Azure AI Studio, Azure Machine Learning, and Azure OpenAI Service to develop a co-pilot to help employees interpret results via conversational chat, which reduced analysis time by 80%. Before the use of this AI technology, client-facing media planners might have to wait weeks to get what takes minutes now.
- **Bose** reported working with a company called Automated Creative in England that produces 5,000+ pieces of content a month (e.g., stills, video, product copy, search copy). The output provides different springboards for thought, which humans then plus-up.
- The **Brandtech Group** and **Adobe** introduced a partnership to integrate the industry-leading and commercially safe Adobe Firefly Services into Brandtech’s established generative AI marketing platform Pencil Pro, creating efficiencies for brands’ marketing campaigns. Brandtech clients using Pencil Pro will be able to interoperate between Adobe Photoshop, Adobe After Effects, and generative AI workflows, allowing them to create insights, generate creative content at massive scale, predict performance and quality scoring, and more.

- **Analytic Story Architects** launched its AI offering to assist brand advertisers bogged down by fragmented systems and having to spend excessive time searching for proof points. Per the firm, effective analytic storytelling improves business outcomes by 20%. ASA says it provides an analytic story that is evidence-backed, is objective-aligned, and drives measurable growth.
- **Waldo** states that its AI platform can generate a complete marketing strategy including competitor analysis, SWOT, and strategic recommendations in just two minutes instead of the traditional 44 hours. Waldo automates complex research tasks with dozens of workflows covering every aspect of brand strategy. Clients include Havas, IPG, Uber, WPP, Accenture, Conair, and BCG.
- **AdCreative.ai** launched its v9 and what it says is the world's first product video-shoot generator, transforming a simple product photo into product videos. The firm claims a 110% higher return on ad spend on average.
- **Coca-Cola** leveraged generative AI to create text, images, audio, and video through large language models. For the holidays, Coca-Cola worked with three AI studios—Secret Level, Silverside AI, and The Wild Card—to produce three versions of its fully generative AI TV commercial “Holidays Are Coming” (a classic ad originating from 1995).
- **Meta** launched its Movie Gen application, a new standard for immersive AI content that allows users to use simple text input to produce long, high-definition custom videos (at different aspect ratios) and sounds (sound effects, background music, or entire soundtracks that reflect the tone, rhythm, and style), edit existing videos, and transform image into unique videos. Production company Blumhouse created videos with Movie Gen to showcase the app's capabilities.
- Banking giant **Citi** announced that it's in the early stages of deploying AI capabilities across its marketing activities. Citi is focusing on three things: content creation, personalization, and validation. The company also rolled out new AI tools (e.g., Citi Assist, Citi Stylus) to its employees in eight countries, including the US, UK, and Canada, to assist with searching internal bank policies, and summarizing, comparing, or searching documents simultaneously.
- New York-based business agency **Gale** reported 80% efficiency gains by using **Alchemy.AI** to query tens of thousands of variables from dozens of sources, vastly reducing the time spent on tasks like learning platforms, briefing dedicated research teams, and receiving output. Gale also reported generating media plans 20% faster. (Gale was named Adweek Breakthrough Media Agency of the Year, Ad Age Data & Analytics Agency of the Year, and #5 on the Ad Age A List).

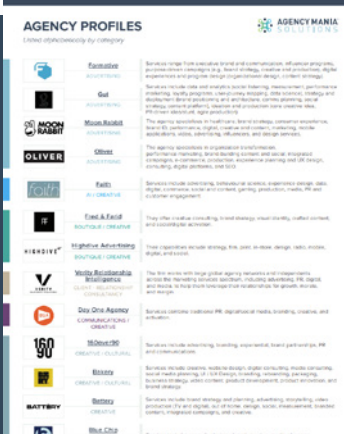
- Per Sorrell, **five areas where AI will significantly impact advertising and media:**
 - 1) Visualization and copywriting (two hours instead of three weeks)
 - 2) Hyper-personalization (and reduction of costs per asset)
 - 3) Media planning and buying (with greater reliance on algorithms)
 - 4) Agency and client efficiency
 - 5) Knowledge transfer (with flatter and more agile organizational models)
- Per Google, snack food giant **Mondelēz International** produces 20 million creative assets in more than 150 countries and reported a 20% increase in ROI in the US and 10% globally by leveraging AI. Mondelēz recently partnered with Google Cloud to unify its datasets with AI to enhance marketing personalization.
- WPP's **GroupM** announced that it will spend \$30 million educating and training its employees to work with AI. It says 70% of the people it hires already have experience with the technology. The firm believes that in the next five years no human will touch a media plan.

In-house agencies

- Per the ANA's **The CMO's Playbook for Marketing Technology**, key success metrics to strike the right balance between in-house capabilities and outsourced expertise: cost efficiency, speed to market, vendor performance, resource utilization, and return on investment. 50% of CMOs identified the staffing and training of teams to use tools as one of their top challenges, indicating a potential driver for outsourcing certain roles to overcome talent gaps.
- Per Blum Consulting Partners, **a future-proof in-house agency** requires a strategic focus on key areas:
 - 1) Defining expertise and roles (strategic thinkers, content creators, channel specialists, data analysts)
 - 2) Streamlining collaboration (cross-functional workshops, shared content calendars and workflow automation, and open communication channels)
 - 3) Investing in growth (training, networking, performance measurement)

Looking for more?

Download our consolidated list of Agencies Profiled from our Industry Updates: agencymania.com/agency-profile-archive



Noteworthy quotes:

- » “By joining Omnicom, we are creating a uniquely comprehensive portfolio of services that will make us the most powerful marketing and sales partner in a world that’s changing at speed.” —Philippe Krakowsky, CEO, **Interpublic Group**
- » “Bigger is better in this industry but only up to the point it becomes unwieldy and stifles innovation in a rapidly changing time. The two companies [Omnicom and IPG] will be frozen for probably two years here between global regulatory approvals and consultant-led downsizing and reorganizations.” —Mark Penn, Chairman and CEO, **Stagwell**
- » “I attract and retain clients through talent.” —John Wren, CEO, **Omnicom Group**
- » “[About the merger of Omnicom and IPG] It’s a bit like going back in time and thinking that merging Kodak and Blockbuster together would lead to the world’s No. 1 internet or social media company.” —David Jones, Founder and CEO, **The Brandtech Group**
- » “‘Business as usual’ strategies no longer deliver growth, at least as long as agencies remain passive partners who accept bloated scopes of work at insufficient fees.” —Michael Farmer, CEO, **Farmer & Co.**
- » “Relationships matter. Treat each other like partners. We all want the same outcome: to perform better and solve problems to deliver solutions that benefit our patients.” —Kyle Peckens, VP of Commercial Indirect Procurement, **Pfizer**
- » “We need exceptional tools around different kinds of data, the ability to use that to make decisions, the willingness to put skin in the game as it relates to outcomes.” —Philippe Krakowsky, CEO, **Interpublic Group**
- » “Up until recently, the cost of entry to compete with any of us was pretty low. Today, you need very sophisticated tools, platforms, and technology.” —John Wren, CEO, **Omnicom Group**
- » “Is there anything a \$26 billion company can do that a \$13 billion company can’t? If anything, technology is making it easier for smaller to be bigger as AI enables agencies to do more with less.” —Mark Penn, Chairman and CEO, **Stagwell**
- » “The size and scale of hold co-agencies are becoming unwieldy, which clearly inhibits innovation, creativity and differentiation.” —Alison Monk, Founder and CEO, **Eden Collective**
- » “At Stagwell, we have always believed scale of services is important, but there is a size at which bigger becomes slow, antiquated, and homogenized.” —Mark Penn, Chairman and CEO, **Stagwell**
- » “The core creative skills remain unchanged: storytelling, communication, imagination, and an understanding of the humans you’re both working with and trying to reach—and the cultural context in which they live.” —Brad Simms, CEO, **Gale**
- » “In uncertain times, playing it safe can sometimes be the most dangerous thing for a brand, and for an agency, it means you are playing at the level of a vendor, just answering a brief rather than being a true business partner.” —Sarah Collinson, CEO, **Havas New York**
- » “AI won’t replace the job of a marketing creative; it will change how they work.” —Brad Simms, CEO, **Gale**
- » “There’s going to be a shakeout in the creative production and agency businesses. The ones that figure out, not just how to utilize AI, but how to utilize it in their niche specialties better, are going to be the ones that are going to really prosper.” —Jim Mollica, CMO, **Bose**
- » “2025 is set to be the year of tectonic disruption in marketing as gen AI is rolled out at massive scale by the world’s most progressive marketers.” —David Jones, Founder and CEO, **Brandtech**
- » “It is too early to evaluate the effect of AI on holding company operations, although it is clear that AI will ‘steal’ a significant number of man-hours and revenues unless remuneration schemes are changed to ‘pay for the work’ rather than ‘pay for man-hours’” —Michael Farmer, CEO, **Farmer & Co.**
- » “Amid widening deployment of AI, agency network consolidation, and shifts in how brands organize their marketing operations, agencies must articulate their differentiation, creative capabilities, and success stories with precision. And not forgetting a touch of humanity. It’s still a people business.” —Carol Mason, Managing Director, **Adforum**
- » “The future of IHAs [in-house agencies] lies in fostering a collaborative spirit between departments and aligning the creative team with the company’s overall strategy. Leaders who can navigate these dynamics will create a flywheel effect, where early successes build momentum, driving further buy-in and creative breakthroughs.” —Andrea B. Ruskin, Partner, **Blum Consulting Partners**

- » “In today’s rapidly evolving landscape, AI is not just a tool—it’s a transformative force helping us deliver more personalized and impactful customer experiences that better meet the needs of our clients.” —Alex Craddock, Chief Marketing and Content Officer, **Citi**
- » “Agencies will increasingly become validators because you’ll need an independent third party to validate what the platforms and algorithms are implementing in the right way.” —Martin Sorrell, Executive Chairman, **S4 Capital**
- » “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**

- » “Brands want partners fluent in AI—delivering faster, smarter, personalized content. Strong tech capabilities and sharp strategy will drive bigger scopes of work.” —Jarrod Bull, Managing Director, **MachWon**
- » “It’s an era of bot-to-bot marketing. Your machines are now marketing to consumers’ machines.” —Raja Rajamannar, Chief Marketing and Communications Officer, **Mastercard**



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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

Check out the **2024 Industry Update** booklet—a consolidation of all our bimonthly Industry Updates from last year! It provides a comprehensive recap of the pivotal moments of 2024, while also serving as a guide for the year ahead, offering valuable insights into what 2025 may bring to the ever-evolving world of advertising.

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



Should we expect chaos in creativity in 2025?

AI will eventually power everything we use, without a doubt. It will even translate dog whining apparently. We are seeing AI agents come up.

Accenture launched 12 agents to handle marketing-related activities such as optimizing campaigns and centralizing different sources of data to provide campaign insights. CES in January was such a powerful showcase of innovation. Topics included AI-powered personalization; inclusive and accessible tech; sustainability and ecoconscious products; social impact and cultural responsibility; culturally relevant content creation; digital human and virtual experiences; smart devices for every lifestyle; next-gen advertising platforms; and data privacy awareness.

• Per Ad Age, **top 10 best ads of 2024** were:

- 1) Nike “Winning Isn’t Comfortable” (Wieden+Kennedy Portland)
- 2) Roku “Less Screaming, More Streaming” (Fellow Kids)
- 3) Telstra “Better on a Better Mobile Network” (Bear Meets Eagle on Fire)
- 4) CeraVe “Michael CeraVe” (Ogilvy PR)
- 5) Pop-Tarts “Edible Mascot” (Weber Shandwick)
- 6) Penny “Price Packs” (Serviceplan)
- 7) Visit Oslo “Is It Even a City?” (NewsLab AS)
- 8) Volvo “Moments That Never Happen” (Newland)
- 9) Apple “Flock” (TBWA\Media Arts Lab)
- 10) Lynx “Robbery” (LOLA MullenLowe)

• Following the \$6.2 million sale of Italian artist Maurizio Cattelan’s concept art called “**Comedian**”—a banana duct-taped to a wall by Justin Sun, founder of cryptocurrency platform Tron—the following brands attempted to capitalize on the phenomenon with their own, adapted version of the auction: e.l.f. Cosmetics, Savannah Bananas, Walmart, Cheetos, Liquid Death, Rxbar, and Mailchimp.

• **Nielsen** joined forces with TikTok to allow advertisers and agencies to compare ad performance on the platform across all screens, including digital, connected TV and linear TV. The collaboration allows the integration of TikTok’s clean room technology and Nielsen’s panels and data assets to provide independent reporting of demographic data in Nielsen One.

• Per Ashley Yetman, co-CEO and director of brand strategy at Baldwin&, five ways to **streamline the agency strategy process**:

- 1) Focus on translation, not research
- 2) Onboarding and creative should happen in sync
- 3) Offer a deliverable as quickly as possible
- 4) Create trust by trimming the fat
- 5) Research can always be added if there are real knowledge gaps

• **Still G.I.N.** collaborated with the agency Rosewood Creative and the entertainment-focused generative AI company Metaphysic to create a 30-second AI-generated spot featuring Frank Sinatra, Sammy David, Snoop Dogg, and Dr. Dre.

• Telecom giant **Vodafone** created a spot entirely with AI-generated imagery, called “Rhythm of Life,” with UK-based agencies New Commercial Arts and Design Bridge and Partners, as well as New Zealand-based Sleeper and production house Lipstick. The spot, which is targeted at the European market, was produced with 10 AI creators and the AI production platform ComfyUI.

• **Havas** reported a strong 2024 with the following key achievements: launched a global new operating system and its four pillars (intelligence, design, activate, measure) called Havas Converged; was publicly listed on Euronext Amsterdam; was named US #1 Agency Globally for Creativity by WARC and was crowned #1 Most Innovative Company in Advertising and Marketing by Fast Company; won more than 1,600 new clients (including Nespresso, FedEx, KPMG, Guinness, Nomad Foods, and Wyndham Hotels); won more than 1,400 awards during industry events; acquired 35 agencies (Wilderness, DPMG, Liquid, etc.); invested millions in tech and innovation (€400 million tech investment over the next four years); and earned an 8+ global average client and team satisfaction score.

ARTICLE: The Truth about Gen AI Contributed by: Claire Randall Consulting

Generative AI is advancing at an incredible pace, transforming from a tool with early limitations into a powerful force that keeps evolving.

While brands explore its potential, discussions around integration, intellectual property, and human creativity continue to shape its future.

A closer look at where AI stands today—and where it’s headed next—reveals a rapidly shifting landscape.

Want to read more? Click [here](#) for the full article.



- Per the ANA's **The CMO's Playbook for Marketing Technology**, key success metrics to build a measurement framework for campaign performance and marketing value: marketing ROI, campaign performance, customer acquisition cost, customer lifetime value, time to insight, data accuracy, real-time data capture. 50% of CMOs placed solutions that help measure performance and demonstrate ROI in their top three most critical capabilities needed to achieve their 2025 marketing goals.

Awards:

- Per **Adweek's 2024 Agency of the Year** awards: Quality Meats (Small Agency of the Year), Mischief @ No Fixed Address (Midsize Agency of the Year), Deutsch (US Agency of the Year), Mother London (International Agency of the Year), TBWA (Global Agency of the Year), Miramar (Breakthrough Agency of the Year), Majority (Multicultural Agency of the Year).
- Tank Worldwide Canada was named Ad Agency of the Year at the **Lisbon International Advertising Festival**, taking home five awards in key categories, including Best Use of Digital. Other noteworthy winners: Ogilvy Health London (Grand Prix) in the Lisbon Health category for the "Melanoma Law" campaign (Skin Cancer UK), and Havas Lynx NY (Gold) for its "Younger Than You Think" campaign (Eisai) and Diamond (Gold) in the Lisbon PR category for its "Welcome to Trafficking School" campaign (The Joy Smith Foundation).
- Per **The One Club for Creativity**, Interpublic Group's FCB won the top spot, followed by Rethink Toronto, McCann New York, TBWA\Media Arts Lab Los Angeles, and Serviceplan Germany Munich. FCB New York won Global Agency of the Year, and FCB Global won Agency Network of the Year for 2024 (followed by Ogilvy Group and VML). Top in-house agencies: Google Brand Studio, Apple Marcom, and Superette (DoorDash).
- **MediaPost** named IPG Mediabrands as Media Agency of the Year, Giant Spoon as Independent Agency of the Year, Omnicom as Holding Company of the Year, and Mattel's Lisa McKnight as Marketer of the Year.

Noteworthy quotes:

- » "Great advertising ideas do not wear out. It's the discipline of incompetent marketers that wears out." —Bob Hoffman, Chief Aggravation Officer, **Type A Group**
- » "These days, the way to distinguish yourself is letting clients know you speak their language, are ready to dive into a holistic and strategy-embedded creative process, and want to work as nimbly as possible to deliver them great ideas." —Ashley Yetman, Co-CEO and Director of Brand Strategy, **Baldwin&**
- » "AI was used as the production tool to enhance mainly and accelerate the process for us. But the campaign's direction, storytelling and the vision were all crafted by our creative team." —Amr El Badry, Global Senior Brand Identity and Communications Manager, **Vodafone**

- » "Consumers want clarity and simplicity. Marketers want to complicate the shit out of everything." —Bob Hoffman, Chief Aggravation Officer, **Type A Group**
- » "AI agents will create a zero moment of truth. They will create value for people, and people need to learn to work with those AI agents as part of the team." —Maddie Bell, CEO, **SchedulerAI**
- » "AI is now allowing us to be able to create concepts and also ideas more quickly by putting in the right prompts in a structure to be able to come up with more ideas and then iterate on those much faster... The next frontier will be doing that with visuals and advertising. So it's a tool to achieve outcomes faster and better and more efficiently for higher degrees of effectiveness and value creation." —Marc Pritchard, Chief Brand Officer, **Procter & Gamble**
- » "We can pursue high ROI initiatives while also being culturally relevant and innovative. Balancing these aspects is key to successful marketing today." —Todd Kaplan, CMO, **Kraft Heinz**
- » "I still strongly believe in creativity, but you want to be informed by the data, and then you want to validate success by the data." —Jim Mollica, CMO, **Bose**
- » "Agencies are paid for man-hours associated with the work they do. The fact that the work is creative does not mean it cannot be documented or measured." —Michael Farmer, CEO, **Farmer & Co.**
- » "If the quality of contemporary advertising can be attributed to being data-driven, it's being driven right off a cliff." —Bob Hoffman, Chief Aggravation Officer, **Type A Group**
- » "Always make sure you're telling clients something they don't already know." —Jessica Buch, Head of Strategy, **Grey Germany**
- » "You've got to create an atmosphere of fearlessness, and the sense that there is no wrong answer, but there are just some that are better than others." —Sir John Hegarty, Co-Founder and Creative Director, **The Business of Creativity**
- » "The only constant in the media business is change, and we are going to experience more change in the next five years than we have in the last 25 years." —Brian Lesser, CEO, **GroupM**

FINANCIALS: Driving efficient use of resources



The global advertising industry is poised for significant growth, with GroupM projecting it will surpass \$1 trillion in revenue in 2025. US ad revenue was expected to climb by 9% in 2024 and is forecast to grow by 7% in 2025, excluding political ads. Retainer zero-based budgeting (or RZBB) may be a necessity for marketing leaders looking to realign their agency investment to their business priorities, avoiding the danger of simply using past budget assumptions to inform future ones. Major mergers include Omnicom's \$13–\$14 billion acquisition of Interpublic Group, projected to deliver \$750 million in annual cost savings. Key trends are declining creative agency service prices and increasing demand for transparency in agency remuneration, as highlighted by the WFA and MediaSense. Black Friday online sales hit a record \$10.8 billion. Netflix's advertising revenue is forecast to reach \$3.2 billion in 2025. Notable M&A activity includes Kantar Media's \$1 billion sale to a private equity firm and WPP's acquisition of T&Pm.

- WPP's **GroupM** predicted that the global ad industry would surpass \$1 trillion in total revenue for the first time, climbing by 7.7% in 2025 to hit \$1.1 trillion. Per the firm, US ad revenue was forecast to climb by 9% in 2024—excluding US political advertising—to \$379 billion and by 7% in 2025.
- On November 1, 2024, the IRS announced **cost of living adjustments** affecting the dollar limitations for retirement plans for 2025. COLA is calculated based on the increase in the Consumer Price Index (which tracks how the price of consumer goods and services changes over time) as determined by the US Department of Labor's Bureau of Labor Statistics. In 2024, the Social Security COLA was 3.2%, and in 2023, at the height of pandemic-fueled inflation, it reached 8.7%. COLA is often a factor in conversations with agencies about labor rate adjustments.
- **Interpublic Group of Cos.** CEO Philippe Krakowsky is expected to receive a golden parachute currently valued at \$49 million (including payouts of cash, equity, pension/deferred compensation, and perks/benefits) and a top job at Omnicom (co-president and co-chief operating officer) as a result of the proposed IPG and Omnicom merger.
- Gartner issued its "**Building the Marketing Function of Tomorrow**" research. Per the study, only 24% of CMOs had sufficient budget in 2024 to execute their strategy, requiring them to use ZBB (zero-based budgeting), a management accounting technique in which budgetary judgments are made for each line based on projected return and alignment with strategic goals:
 - Step 1: Start with a zero base and define the scope of marketing costs
 - Step 2: Reprioritize investments using ZBB
 - Step 3: Pressure-test key assumptions underpinning your model
 - Step 4: Apply budget scenarios to the ZBB model
 - Step 5: Build a regular cadence of ZBP planning and collaboration
- **Black Friday** set new records in 2024. Per Adobe Analytics, consumer spending reached a record \$10.8 billion online, up by 10.2% YOY. Between 10 a.m. and 2 p.m., \$11.3 million was spent online every minute. 55% of online sales were conducted with a mobile device.
- Streaming giant **Netflix** is expected to reach \$3.2 billion in advertising revenue in 2025, fueled by growth in live sports and other events. The firm is forecast to double its advertising revenue, with 56% coming from North America.

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"With marketing procurement in the pivotal role of facilitator, now is a prime opportunity to strengthen the value exchange between advertisers and their agencies."

Bruno Galpois
 Excerpt from the article, *The Marketing Procurement Renaissance: Redefining Value and Innovation in a New Era of Relationship Capital*

- Per Michael Farmer, **creative agency service prices** have been in decline for more than 30 years as indicated by the “price per ScopeMetric® Unit” (a measure of fees divided by agency SOW workloads calculated by Farmer & Company). It declined to \$110,000 per SMU in 2023. This price level is equivalent to \$175 per hour for the required agency FTEs on a ScopeMetric Unit. The total creative product range is about 4,000 unique deliverables across 20 media types.
- The WFA and the global media advisory firm MediaSense released a study titled “**Future of Agency Remuneration.**” Three quarters of brands want to change their agency remuneration model to deliver better alignment to business outcomes, greater accountability, and improved access to talent. 84% highlighted the lack of data and measurement between the advertiser and agency to measure outcomes as a major barrier, and 87% believe agencies are resistant to adopting models that require greater transparency in how they make money. 75% care about how their agencies make money, but only 28% believe they have transparency into how they do. 61% expect agency fees to increase over the next three years. When AI is deployed, 58% of brands expect to pay less.
- Agency network **Havas** became an independent, publicly traded business following a spin-off from parent company Vivendi (which acquired it in 2017). It debuted on the Euronext Amsterdam exchange with a valuation of \$2.6 billion. Havas, with 23,000 employees, made 10 acquisitions in 2024, including the social media agency Wilderness and B2B shop Ledger Bennett.
- Mediaocean** launched a partner program called Certified Service Partner, initially with Interpublic Group, Omnicom Group, and WPP, giving the holding companies small equity stakes in the ad tech company. CSP is designed to enable them to integrate and offer Mediaocean’s ad tech services (Flashtalking and Protected by Mediaocean) for ad serving, creative optimization, paid social optimization, fraud detection, and brand safety, the company said.
- Per David Little of Trinity P3, here are **eight ways procurement professionals protect agencies from bias and corruption:**
 - 1) They establish transparent processes (use clear evaluation criteria, document decisions, leverage third-party oversight)
 - 2) They practice robust ethical guidelines (code of conduct, conflicts of interest)
 - 3) They use technology to mitigate bias (e-tendering platforms, data-driven insights)
 - 4) They foster open competition (fair access)
 - 5) They encourage openness (transparent communication, respectful engagement)
 - 6) They conduct regular audits
 - 7) They provide training for procurement teams (on ethical procurement practices, bias, and anticorruption measures)
 - 8) They provide long-term relationship management (performance reviews, avoid favoritism)

- In the 2024 **ISBA x RightSpend Future of Remuneration** survey, only 48% of brands believe they’re getting value for their money from their agencies—down from 83% in 2022. RightSpend’s assessment is that this huge drop is likely due to the complexities (with transparency in media buying and cost structures under particular scrutiny) that have crept in over the last few years.
- Per **COMvergence**, GroupM’s EssenceMediacom was the top-ranked top agency for 2023 global billings—estimated at \$24.5 billion (up 0.2% from the prior year)—followed by Omnicom Media Group’s OMD with an estimated \$24 billion, scoring the highest growth rate among the top 10 agency networks (8.7%). GroupM’s Mindshare placed third with \$21 billion (+6%). Omnicom Media Group (OMG) ranked as the #1 global media group for new business in the first nine months of 2023, fueled by a series of wins and retentions (Amazon, Volkswagen Group, Unilever, Priceline, HanesBrands, and HP), or \$7.37 billion in total new business (wins minus losses, including retentions)—representing 28% of all new business awarded during the first nine months of 2023—while also earning the highest retention rate (85%) in its category. OMG agency OMD Worldwide ranked #1 for total billings volume, with the highest rate and volume of growth among all global media networks; and PHD and Hearts & Science delivered growth across every region.

Top global media agency networks, ranked by billings:

Rank	Media Agencies	Total 2023 Billings \$US M	Total 2022 Billings \$US M	Growth 2023 vs 2022 \$US M	Growth 2023 vs 2022
#1	Essence Mediacom	24 510 M\$	24 454 M\$	57 M\$	0,2%
#2	OMD	24 022 M\$	22 106 M\$	1 915 M\$	8,7%
#3	Mindshare	20 939 M\$	19 752 M\$	1 186 M\$	6,0%
#4	Zenith	15 950 M\$	14 781 M\$	1 169 M\$	7,9%
#5	Wavemaker	15 327 M\$	14 668 M\$	659 M\$	4,5%

Source: COMvergence

Mergers and acquisitions (M&A) activity

- Omnicom Group** announced a takeover of rival holding company Interpublic Group of Cos., estimated at \$13-\$14 billion, in a bid to create the world’s largest advertising group by combining the two New York-listed businesses and accelerating innovation to realize annual savings of \$750 million. The new Omnicom will have more than 100,000 expert practitioners. The company will deliver end-to-end services across media, precision marketing, CRM, data, digital commerce, advertising, healthcare, public relations, and branding. Based on 2023 numbers: combined revenue of \$25.6 billion (57% US, 43% international), adjusted EBITA of \$3.9 billion, free cash flow of \$3.3 billion.
- Kantar Group** announced its plans to sell Kantar Media (which operates in more than 60 markets and is a principal competitor in TV measurement with Nielsen) to private equity firm H.I.G. Capital for an estimated \$1 billion, pending regulatory review. Kantar Group is majority-owned by Bain Capital, with a 40% stake owned by WPP.


- Telecom giant **T-Mobile** acquired New York-based Vistar Media, an ad tech firm specializing in digital out-of-home, for \$600 million in a move to grow the carrier's ad business beyond phone and internet plans. Vistar has more than 1.1 million digital screens, including displays in Times Square and other high-traffic areas, to support more than 3,000 advertisers.
- **Interpublic Group** sold digital firm Huge to global private equity firm AEA Investors. AEA Investors is expected to merge Huge with one of its other shops, Hero Digital.
- **Interpublic Group** acquired Intelligence Node, an e-commerce intelligence platform, in a move to enhance its commerce capabilities. It will provide clients with real-time products and market intelligence to understand shopper trends, drive sales growth, and optimize performance in the digital marketplace. The firm leverages AI to aggregate and analyze billions of data points across more than 1,900 retail categories in 34 global markets, delivering insights into product attributes, media, pricing, availability, promotions, and consumer sentiment.
- **WPP** sold a majority stake in FGS Global to KKR-backed Kite Bidco Inc. for \$775 million in cash. WPP created the company in 2021 by merging strategic communications and public affairs firms Finsbury, The Glover Park Group, Hering Schuppener, and Sard Verbinen & Co.
- **WPP** acquired full ownership of T&Pm, the result of the merger of creative agency The & Partnership and media agency mSix, leveraging GroupM's buying power. T&Pm has 1,800 staff in 42 locations. It will continue to operate as a stand-alone agency, leverage WPP's AI-powered marketing operating system, WPP Open, and partner with WPP agencies to serve clients.
- **Mediaocean** acquired Innovid, an independent New York-based software platform for the creation, delivery, measurement, and optimization of advertising, for \$500 million. The move will integrate that business under Mediaocean's Flashtalking ad tech platform, which includes ad serving, creative optimization, and paid social optimization, to create a premier global, independent, omnichannel ad tech platform. The combined offering includes ad delivery, creative personalization, measurement, and optimization across channels, including digital, social, CTV, and linear TV.
- **Publicis Media** acquired impact film-marketing agency Picture Motion in a move to strengthen its existing content capabilities and sit within its specialty entertainment division, Publicis Media Content & Innovation, collaborating with brand clients and entertainment industry partners.
- **Stagwell** acquired Germany-based Unicepta, a global media monitoring and analytics platform, joining Stagwell Marketing Cloud's PProphet Comms Tech Suite of AI-powered offerings for PR and marketing professionals. Unicepta, with headquarters in Cologne and offices in Berlin, London, Paris, São Paulo, Shanghai, Washington and Zurich, provides monitoring and data analytics for Fortune Global 500 companies.
- **Stagwell** acquired Create. Group, a Middle East digital agency headquartered in the UAE that specializes in strategy, social media, content production, and data analytics. The agency is composed of Create., the digital agency, and Create. Production, the content production studio. It will be aligned with Stagwell's digital agency network Code and Theory.
- Boston-based Software company **Later**, a specialist in developing influencer marketing and social media management software, acquired influencer platform Mavely (aka "Everyday Influencer Platform" with its 120,000-plus creators) for \$250 million in a move to deliver "full-funnel impact and measurable ROI for marketers while enabling creators to maximize their earnings through social commerce."
- Toronto-based healthcare marketing agency **Klick Health** acquired Peregrine Market Access, a consulting, communication, and commercialization agency serving the life sciences industry, in a move to strengthen Klick Health's operations that focus on value, access, and reimbursement activities.
- Independent creative agencies **DNA** (LGBTQ+ and Black-owned) and **Little Hands of Stone**, both based in Seattle, merged to form DNA&Stone. DNA brings media and communication planning capabilities to Little Hands of Stone. Combined clients now include Rover, Amazon, Purina, Providence, and Rainier Beer.
- Toledo, Ohio-based advertising and brand management agency **Hart** acquired Rebuild, a Detroit-based agency that specializes in developing creative strategies for connective brand campaigns.
- Creative agencies **Merrick Creative**, based in Greenbelt, Maryland, and **Ellen Bruss Design**, based in Denver, have merged, combining decades of expertise in branding, marketing, and design across industries such as real estate, food and beverage, hospitality, and consumer products. They will operate as Merrick Creative.

Need to manage your Agency Roster?

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Noteworthy quotes:

- » “Don’t chase money. Chase opportunity.”
—Sir John Hegarty, Co-Founder and Creative Director, **The Garage Soho & The Business of Creativity**
- » “Procurement no longer fits under finance. It’s outgrown only doing cost savings. The impact & value has changed.” —Mathew Schulz, Founder, **Matchat**
- » “Now that AI is demonstrating its ability to accomplish not just some, but most of the tasks and activities required to deploy a marketing campaign, migrating to a new revenue model is both a strategic and financial imperative.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “In the realm of marketing, the focus needs to be on value, not price. However, that doesn’t mean that we sign up for a Ferrari when a Mustang will do.” —Kevin McCollum, Manager, Indirect Sourcing Media and Digital Commerce, **The Hershey Co.**
- » “Healthy, fact-based debates foster balanced, well-rounded decisions that ultimately drive the best outcomes.” —Kristi Boyd, Senior Director, **The Coca-Cola Co.**
- » “Agencies imagine that the solution to the revenue model conundrum is hopelessly complex. But the essence of the solution is markedly simple: stop charging for inputs and start charging for outputs. Instead of pricing the hour or the person, price the deliverable itself.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “There must be a balance between value and price, The key to success in marketing procurement is knowing how to manage this conversation.” —Kim Harrison-Johnson, Director, Global Strategic Sourcing Marketing Events and Travel, **LinkedIn**
- » “Procurement offers so much more than just negotiating scopes and finding cost savings.” —Veronica Santiago, Global Commodity Manager, Marketing, **Dell Technologies**
- » “If it’s a lasting relationship you’re seeking, always operate as efficiently as possible from a money-saving mindset.” —Ashley Yetman, Co-CEO and Director of Brand Strategy, **Baldwin&**
- » “The best way to protect yourself is to build a relationship with your agency where you can ask tough questions and know they are being transparent with you.” —Chris Koehler, CMO, **Twilio**
- » “The big question now is: what are we really paying for? Is it the quantity of assets, or should we shift towards paying for the outcomes those assets deliver? This is where the real value lies, and it’s reshaping how we approach AI and its impact on procurement and beyond.” —Alexey Gorchakov, Strategy and Insight Lead, Global Procurement, **Unilever**
- » “Agency executives make the mistake of assuming their problem is suboptimal negotiating skills; that they need to learn how to better defend their hourly rates. But that’s just getting better and better at doing the wrong thing. The point isn’t to improve how agencies work within the system—it’s to change the system, which means entering compensation discussions with a different, more effective approach.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “Scale still matters, it’s just been redefined. It’s much more about our collective wisdom and intelligence.” —Brian Lesser, CEO, **GroupM**
- » “I’ve had the opportunity now to work on several clients who have moved to deliverables-based remuneration. And I don’t really want to go back to the old way, because frankly, this works so much better. You do not spend any of the time that you spend in the old way, justifying who’s on the business, what their title is, how much they’re paid, either inside the company or to the client. Whereas on an output deliverables based remuneration, you’re talking about the work, what you’re delivering, what you need to deliver.” —Adam Tucker, Global Client Lead (Mondelēz International), **WPP**

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AGENCY: Agency reviews and roster changes

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

- Design software company **Autodesk** selected independent Giant Spoon as its first creative AOR following a review. The agency will handle all brand campaigns, creative assets, strategy, and media efforts, working with the company's in-house team.
- Used car retailing giant **CarMax** kicked off a review of its media and creative business in the US. The incumbents, creative firm The Martin Agency and media agency Dentsu X, are expected to defend.
- **Deutsch Family Wine and Spirits** selected Tombras as its media AOR following a review, replacing 14-year incumbent Havas Media, and expanding the brand's relationship with the agency (previously focused on Yellow Tail and Josh Cellars). The agency will handle all media planning and buying across the brand's portfolio, which includes Cantera Negra Tequila, Bib & Tucker Bourbon, and Redemption Whiskey.
- **Edgewell Personal Care's Schick Hydro Silk** selected indie full-service agency Bandits & Friends as its lead creative AOR. The agency will handle brand and creative work for the women's razor line.
- Online casino **FanDuel Casino** (owned by FanDuel) selected Brooklyn, New York-based independent agency Orchard Creative as its creative AOR following a review, replacing incumbent Mischief @ No Fixed Address.
- Swedish home goods retailer **Ikea** kicked off a review of its creative business in the US. WPP's Ogilvy is expected to defend. The brand recently changed media AOR, selecting Dentsu's Carat, replacing WPP's GroupM agency Wavemaker. Ikea will continue working with IPG's McCann, which handles all global brand marketing.
- **J.P. Morgan** selected IPG-owned The Martin Agency as its creative AOR for its wealth management business following a review. Incumbent Accenture Song's Droga5 will retain some of the business.
- Department store chain **JCPenney** selected Mischief @ No Fixed Address as its creative AOR without a review. There was no incumbent on the account as the brand was handling the work in-house. The agency will partner with existing AORs Dentsu X (media) and Omnicom Group agency FleishmanHillard (PR).
- Pharma giant **Johnson & Johnson** selected WPP as its media planning and buying AOR for North America following a review, replacing incumbent J3, a dedicated unit formed by Interpublic 10 years prior. WPP will assemble a team composed of WPP healthcare specialist CMI Media Group and GroupM, along with other WPP units, and handle all paid media work.
- **Kimberly-Clark** selected Omnicom Media Group as its global media AOR, except for North America and South Korea, following a comprehensive review, in a move to consolidate the firm's company roster. The brand also selected WPP for creative duties for the company's adult care (Depend, Poise, Plenitud, etc.) and childcare brands (Huggies, Pull-Ups, GoodNites, etc.), and IPG for creative duties for family care (Kleenex, Cottonelle, Scott, Andrex, etc.) and feminine care brands (Kotex, Intimus, etc.). The brand previously worked with these agencies but also with hundreds of other agencies globally, such as Droga5, VaynerMedia, Mischief @ No Fixed Address, and Quality Meats.
- Luxury electric vehicle maker **Lucid Motors** selected Giant Spoon as its creative AOR. The agency will handle creative and strategic duties in the US (including TV, digital, social, print, and OOH), with extended support globally.
- **Lufthansa Group** selected DEPT as its new digital AOR. The agency will handle brand and media, customer experience, technology and data, and end-to-end digital experience for the airline.
- **MassMutual** selected Stagwell's 72andSunny New York as its new creative AOR without a review, replacing four-year incumbent Grey. The brand is currently working with Stagwell agencies on a project basis.
- Nonprofit trade organization the **National Association of Realtors (NAR)** selected Uncommon Creative Studio New York as its creative AOR following a review.
- **Panera Bread** selected Stagwell's 72andSunny New York as its creative AOR following a review. The agency will handle all brands, including Panera Bread, Caribou Coffee, and Einstein Bros. Bagels across 2,208 franchises in 48 states.
- **Pizza Hut** selected IPG's Deutsch and WPP's VML as its creative and media AORs, respectively. Deutsch will manage brand strategy, creative, and paid social and video content, replacing six-year incumbent Omnicom-owned GSD&M. VML will handle customer promotions, loyalty, CRM efforts, and digital assets, as well as organic social, replacing incumbent social AOR Mischief @ No Fixed Address.
- Financial services firm **Principal Financial Group** and Principal Asset Management selected Dentsu's iProspect as its media planning and buying AOR in the US following a review. The move expands the work done by the holding company. Dentsu Creative already handles creative, and Merkle handles customer experience for the brand.
- Global sports company **Puma** selected Omnicom-owned adam&eveDDB as its global creative AOR following a review. The agency's London and Berlin offices will manage the account.
- **Sam's Club** launched a review of its creative and media business, which includes duties such as social, influencer marketing, production, and data. Two-year incumbents Arnold and Horizon Media are expected to defend.

- Mutual insurance group **Sentry** selected St. Louis-based ad agency HLK as its media and brand AOR following a review. The agency will handle brand strategy, creative development and production, and media planning and buying.
- UK-based programming network **Sky** selected Publicis Groupe as its media AOR for its top European countries (UK, Ireland, Austria, Switzerland, Germany) following a review, replacing incumbent WPP (which retains work in Italy).
- Burger chain **Smashburger** dropped its creative AOR, Partners in Crime, and moved to project-based relationships. Roster agencies include Havas Formula, Havas Street, social creative agency Kvell, and consultancy and freelancer network firm X&O.
- Seattle-based coffee giant **Starbucks** selected Stagwell's Anomaly as its creative AOR in the US, only months after selecting WPP's SPCSHP, which created a bespoke Team Starbucks composed of WPP agencies such as VML, Ogilvy, and Landor. WPP remains on the roster.
- Automaker giant **Stellantis** retained Stagwell's Detroit-based Doner and Omnicom's GSD&M as creative AORs on its roster. The brand selected Doner for its Ram business and GSD&M for its Dodge, Chrysler, Alfa Romeo, and Fiat businesses. The Jeep account was not under review and is handled by Highdive.
- Organic and cold-pressed juice brand firm **Suja Life** selected BarkleyOKRP as its creative AOR following a review. The brand had no AOR prior.
- **The New York Times** selected Stagwell's 72andSunny as its creative AOR following a review, replacing eight-year incumbent Accenture Song's Droga5.
- Smoothie and fast-casual dining chain **Tropical Smoothie Café** selected independent Horizon Media as its media AOR following a review. The agency will handle data-driven strategies, advanced technology, and innovative media solutions to drive growth for its 1,500 locations.
- **Verizon** hired Wieden+Kennedy as its social media AOR to handle its consumer and business groups following a review, replacing nine-year incumbent Interpublic Group's R/GA. W+K is leveraging its social media-focused Bodega unit and will partner with the brand's creative AOR, WPP's Ogilvy.
- Automobile giant **Volvo Cars** selected Interpublic Group's Mediabrands agency Initiative as its global media planning and buying AOR following a review, replacing incumbent WPP's Mindshare. The agency will manage media strategy, planning and buying in all regions, with the exception of China.
- Southern fast-food chain **Whataburger** selected Chicago-based Empower Media its media AOR, handling media strategy, planning, and buying across all channels
- **Whole Earth Brands** selected Winston-Salem, North Carolina-based The Variable as its integrated AOR for the Whole Earth and Wholesome brands following a review. The agency will partner with the agency Power Digital, which handles digital media buying, planning, and strategic duties..

2024: Agency Reviews and Roster Changes

Apparel and luxury

Unk = Unknown

LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Abercrombie & Fitch	Unk	Events Partner	Unk	Amplify	Unk
	Carter's	None	Creative AOR	Unk	Mischief @ No Fixed Address	N
	Columbia Sportswear	McCann Worldgroup	Creative AOR	Global	adam&eveDDB	Unk
	David Yurman Inc.	mSix&Partners	Media AOR	US, UK, Canada, France	PHD	Y
	Designer Shoe Warehouse	Various project-based agencies	Creative AOR	Unk	Crispin	Y
	Famous Footwear	Empower Media	Media AOR	US	Havas Media Network	Y
	Foot Locker	Unk	Media AOR	NAM		Y
	Fossil Group	mSix (EMEA)	Integrated Media AOR	Global		Y
	Gap Inc.	PHD, PMG	Media AOR	US, Japan, Canada	Omnicom Group	Y
	HanesBrand Inc.	The Martin Agency	Creative AOR	Unk	Special U.S.	Y

Explore the **2024 Agency Reviews and Roster Changes** guide, where we've compiled the key updates from our bimonthly Industry Updates. Our guide offers insights into which clients conducted reviews, their incumbents, agency scope, focus areas, and new agency selections!








Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
 AUTODESK	Autodesk	None/In-house	Unk	Creative AOR	Giant Spoon	Y
 CARMAX	CarMax	The Martin Agency, Dentsu X (expected to defend)	US	Media & Creative	IP	Y
 DEUTSCH FAMILY WINE & SPIRITS	Deutsch Family Wine and Spirits	Havas Media	Unk	Media AOR	Tombras	Y
 Edgewell PERSONAL CARE	Edgewell Personal Care (Schick Hydro Silk)	Unk	Unk	Lead Creative AOR	Bandits & Friends	Unk
 FANDUEL CASINO	FanDuel Casino	Mischief @ No Fixed Address	US	Creative AOR	Orchard Creative	Y
 IKEA	Ikea	Ogilvy (expected to defend)	US	Creative	IP	Y
J.P.Morgan	J.P. Morgan	Droga5 (retains some duties)	Unk	Creative AOR	The Martin Agency	Y
 JCPenney	JCPenney	None/In-house	Unk	Creative AOR	Mischief @ No Fixed Address	N
Johnson&Johnson	Johnson & Johnson	J3	NAM	Media Planning & Buying AOR	WPP	Y
* Kimberly-Clark	Kimberly-Clark	Various agencies (consolidation)	Global (excludes NAM, ROK)	Media AOR	Omnicom Media Group	Y
	Kimberly-Clark (adult & child care brands)	Various agencies (consolidation)	Unk	Creative	WPP	Y
	Kimberly-Clark (family & feminine care brands)	Various agencies (consolidation)	Unk	Creative	IPG	Y
 LUCID	Lucid Motors	Unk	US	Creative AOR	Giant Spoon	Unk
 Lufthansa	Lufthansa Group	Unk	EMEA	Digital AOR	DEPT	Unk
 MassMutual	MassMutual	Grey		Creative AOR	72andSunny	N
 NATIONAL ASSOCIATION OF REALTORS	National Association of Realtors (NAR)	Unk	US	Creative AOR	Uncommon Creative Studio	Y
 Panera BREAD	Panera Bread	Unk	Unk	Creative AOR	72andSunny	Y
 Pizza-Hut	Pizza Hut	GSD&M	Unk	Creative AOR	Deutsch	N
	Pizza Hut	Mischief @ No Fixed Address	Unk	Media AOR	VML	N
 Principal	Principal Financial Group	Prometheus	US	Media Planning & Buying AOR	iProspect	Y
 PUMA	Puma	Unk	Global	Creative AOR	adam&eveDDB	Y
 sam's club	Sam's Club	Arnold, Horizon Media	Unk	Creative & Media	IP	Y
 Sentry	Sentry	Unk	Unk	Media & Brand AOR	HLK	Y
 sky	Sky	WPP (retains Italy work)	UK, various others	Media AOR	Publicis Groupe	Y
 SMASH BURGER	Smashburger	Partners in Crime	Unk	Creative AOR	Havas Formula, Havas Street, Kvell, X&O (project-based)	Unk
 STARBUCKS	Starbucks	None (WPP remains on roster)	US	Creative AOR	Anomaly	Unk
 STELLANTIS	Stellantis (Dodge, Chrysler Alfa Romeo, Fiat)	None	US	Creative AOR	GSD&M (retains duties)	Unk
	Stellantis (Ram)	None	US	Creative AOR	Doner (retains duties)	Unk

Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Suja Life	None	Unk	Creative AOR	BarkleyOKRP	Y
	The New York Times	Droga5	Unk	Creative AOR	72andSunny	Y
	Tropical Smoothie Café	Unk	US	Media AOR	Horizon Media	Y
	Verizon	R/GA	Unk	Social Media AOR	Wieden+Kennedy	Y
	Volvo Cars	Mindshare	Global (excludes CHN)	Media Planning & Buying AOR	Initiative	Y
	Whataburger	Unk	US	Media AOR	Empower Media	Unk
	Whole Earth Brands	Unk	US	Integrated AOR	The Variable	Y

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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



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