AGENCY MANIA SOLUTIONS
Strategic Partnerships Delivered.

Industry Update

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

Volume 49

Executive Summary—Monthly Recap

The ad industry is up and down. Mostly down, if you read the headlines of major industry publications. Unless you are in the tech advertising industry. But it's no "walk in the park."

Even for flourishing tech advertising firms, it comes with a certain level of scrutiny and corporate and social responsibilities. Tech giants—Apple, Amazon, Facebook, and Google—recently defended their business practices before the House of Representatives antitrust subcommittee, which has been investigating the companies for more than a year, collecting 1.3 million documents. That's a lot of data to review.

In a tech-driven world, how do we ensure an open, agile, competitive, dynamic, fair, and socially responsible marketplace? In the meantime, our attention has been focused on addressing the issue of diversity and inclusion with much energy devoted to driving lasting change and providing more transparency. If social issues are changing consumer perceptions and culture, they must also profoundly change how brands and agencies come together to deliver responsible and effective work.

Bruno Gralpois
Co-Founder & Principal
Agency Mania Solutions

Newsworthy reports and recent developments

At AMS, we approach the agency management discipline as four distinct but complementary practice areas—**Talent, Work, Financials,** and **Performance and Value**—which is how we've organized industry developments to follow.

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TALENT: securing the right talent and resources

Diversity will be one of the hot topics of 2020. Large agencies are finally making public their staff diversity numbers. They're hiring heads of diversity and inclusion to revamp employee training, onboarding, and recruitment, or are creating diversity committees like Havas Group has to tackle these talent opportunities in their own organizations. In the meantime, the world of agencies is adapting to the pandemic with leaders contemplating the reopening of offices with modified work environments, voluntary vs. mandated policies, and offering their staff safe, flexible, collaborative workspaces, half physical, half virtual. Acquisitions are still taking place, demonstrating that the ad industry is ready to get back to work with new models and expanded offerings.

- Small and large agencies are hiring leaders to promote **diversity and inclusion**. Recent examples: Omnicom Group's BBDO Worldwide hired Jason Rosario as its first chief diversity, equity, and inclusion officer. Dentsu Aegis Network hired Christena Pyle as its first chief equity officer, Americas. Cleveland-based agency Marcus Thomas hired Elise James-DeCruise as its new chief diversity and inclusion officer.
- After releasing the report, "The Power of Supplier Diversity," the **Association of National Advertisers (ANA)** curated and published a list of certified diverse suppliers that work in marketing/advertising for its members.
- Per The Working Mother Research Institute and their **2020 Diversity Best Practices Inclusion Index**, top-ranked agencies include Publicis Groupe's Leo Burnett and WPP's MediaCom. Brands in the top 10% included Procter & Gamble, L'Oréal, Lilly, AbbVie, Accenture, J&J, IBM, Merck, US Bank, Unilever, and Colgate, among others.
- **Omnicom Group** reported its workforce diversity data in Q2, disclosing that 2.7% of its executive managers are Black, 7.2% are Asian, and 4.9% are Hispanic.
- **Havas** reported its workforce diversity data, disclosing that 2.67% of its executive and director-level management ranks are Black within its US operations, on par with Omnicom and IPG. African American senior managers, managers, and team leaders represent 5.1% of its US staff. African Americans accounted for 10.8% of the workforce.
- Following the lead of Omnicom and Havas, **WPP** also released its workforce diversity data, showing poor representation of ethnic and racial minorities at all management levels (e.g., 2.2% of Black or African American among senior/executive level managers). The firm also committed $30M to inclusion programs and anti-racism charities in addition to their efforts to work with educational institutions and their formation of an Inclusion Council. They also implemented mandatory anti-racism and inclusion training internally.

- A new talent not-for-profit site called **Diverse Creatives** was launched by two ad executives, providing an extensive roster of creative and advertising professionals of color, easily searchable by role, location, and individuals' names.
- New agency **Invisible Collective** launched both production and creative studios to provide greater access to diverse directors/creatives, especially to women, people of color, and members of the LGBTQIA+ community.
- Per the ANA, 66% of advertisers have a **formal relationship management program** in place. 66% are satisfied with it. 54% of have a separate team in place to manage (vs. being handled by sourcing/procurement or the brand). The primary relationship management program is their annual evaluations, followed by mid-year reviews, quarterly feedback sessions/check-ins, regular meetings, and leadership calls. Primary benefits include better communication, greater efficiency, better work, improved ROI, and greater speed (in that order).
- **Google, Facebook, Amazon, and Apple**, aka modern day "cyber barons," participated in hearings that were held by the antitrust subcommittee in the House of Representatives, as all four are subjects of state and federal investigations into their business activities, including predatory acquisitions, data/privacy, and monopoly-type situations.
- **Deloitte** Touche Tohmatsu India LLP acquired Spatial Access, a leading specialized advertising consulting and analytics firm, in order to augment Deloitte's advisory capabilities, including media spend advisory.
- Tech-focused marketing firm **Slope Agency** announced that it acquired TikTok-focused and LA-based agency Abacus Growth, which will operate under Slope Agency's name.
- San Francisco-based agency Venables Bell & Partners launched an offshoot artificial intelligence-driven shop, **B R A I V E**, to help brands build AI-powered solutions focused on building brand experiences and front-facing tools for clients.
- **Accenture** acquired a global, tech-driven content production company, CreativeDrive, to help clients simplify, automate, and scale the creative asset production process (in-house content studio model with proprietary technology) on digital and commerce channels.
- Per IAB and Accenture Interactive, 69% of brands have either partially or completely moved **programmatic buying of display, video, and/or CTV in house**, fueled mostly by increasing data privacy regulations and the demise of cookies.
- Interpublic's targeting/optimization unit **Kinesso** launched "The Developer Community," a "gateway" platform allowing access to its systems and data to help a global network of select partners develop tools, apps, and systems more efficiently. Initial partners include sibling data and analytics giant Acxiom, The Trade Desk, and mobile ad technology firm Playground XYZ.
- **S4 Capital** merged Seattle-based Orca Pacific, which helps clients develop their Amazon ecommerce businesses (with clients like Reebok, Godiva, and Del Monte), with its programmatic company MightyHive.
- Interpublic data company Acxiom launched a portfolio of digital transformation solutions called **ConneCXions**, combining martech tools like customer data platforms with multichannel ad-tech applications and media networks in a seamless, integrated way (in synch with Acxiom's Kinesso and Matterkind offerings).
- The ANA held its second annual **In-House Agency Conference** with 1,000+ attending virtually. Per ANA's Bill Duggan, 85-90% of ANA members may have some in-house capability currently, up from the 78% reported in 2018.
- A controversially titled article "**Is AI the End of Agencies As You Know Them?**" by Karen J. Bannan suggests that technology will lead to dramatic changes in the agency model with artificial intelligence and machine learning transforming as many as 80% of agency jobs by 2030.
- **Stagwell Group agencies** Code and Theory (C&T) and Scout Health joined forces to create a new division dedicated to servicing brands and organizations within the healthcare industry, named Code and Theory Health.
- **Wunderman Thompson** joined forces with Braze Alloys to leverage the Braze platform and enabling Wunderman Thompson to deliver "relevant, real-time, cross-channel customer experiences for our global and enterprise clients."
- **You & Mr Jones** acquired San Francisco-based influencer platform Collectively to ingrate with theAmplify, an LA-based influencer platform that the firm acquired in 2016. You & Mr Jones reported growing 27% in H1 of this year.
- TV advertising software firm **Mediaocean**, which processes over $70 billion in TV advertising per year, acquired ad tech/analytics startup 4C. 4C is known as a "walled garden operator," integrating with Facebook, LinkedIn, Twitter, and Amazon.
- Following its recent acquisition of brand safety and compliance expert BrandVerity, **Partnerize** acquired Pepperjam to strengthen its hold on the affiliate marketing space. Both entities will serve 1,750 enterprise and mid-market clients worldwide and realize $7 billion in transactions through relationships of 750,000 partners and 250,000 influencers.
- Per the San Francisco Business Times, digital-first firm **Firewood** was recognized as the No. 1 Largest Bay Area Agency based on head count (242 in SF and another 70+ employees based in Silicon Valley). The firm recently merged with global creative production company MediaMonks, becoming the digital marketing arm of S4 Capital.
- LA-based marketing services firm LRW Group is rebranding to **Material**, operating as a "new model" holding company, organized under a single P&L, providing cross-functional services and strong of its 10 agency acquisitions in the last four years. Agencies include Karma Agency, Kelton, Killer Visual Strategies, LRWGreenberg, LRW, LRWMotiveQuest, LRWTonic, Salt, Strativity, and T3, operating with offices in 13 cities across the US and UK. It was named the Most Innovative Strategic Consultancy per the 2020 GreenBook Research Industry Trends report.

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- Partnership automation firm **Impact** acquired ACTIVATE, a leading brand and end-to-end influencer SaaS platform (including influencer discovery, reporting, campaign management, and collaborations), which will now be part of Impact's Partnership Cloud. The platform supports 300K+ opt-in qualified and vetted influencers.
- **Been There Done That** agency, a community of 200+ senior Chief Strategy Officers, Creative and Design Directors, and Comms Planning experts, introduced a new approach for fast turnaround thinking, from brief to nine ideas in one week from three diverse thinkers, with simple pricing. Clients include PepsiCo, Unilever, EY, Diageo, Kraft Heinz, and Carlsberg.

Noteworthy quotes:

» "[I]t is the responsibility of ad organizations and corporations to create safe spaces so we can have an ecosystem where people can bring their full selves." —Elise James-DeCruise, chief diversity and inclusion officer, **Marcus Thomas**

» "Every day there's something new—platforms, technology—and finding talent to respond to those needs is key." —Monique Brosseau, president, **GroupM Quebec**

» "We decided we were going to use our voice and advertising as a force for good and do it in a way that also delivers a force for growth."—Marc Pritchard, chief brand officer, **Procter & Gamble**

» "Finding, hiring, and on-boarding such talent invariably takes time, but never more so than during a crisis." —Kenny Powar, co-founder, **Rebel Owl**

» "If there's any part of the business that's on fire, it's digital agencies."—R. Ray Wang, principal analyst and founder, **Constellation Research**

» "We see AI reshaping the construct of the creative team, since you need to find people who have the adeptness to work with insights."—Jay Pattisall, principal analyst, **Forrester**

» "Clients ultimately are buying teams, they're buying trust and they're buying relationships."—Scott Hagedorn, CEO, **Omnicom Media Group**

» "I would reinforce one thing, although we are big, the best relationships are local and they do feel intimate." —Justin Thomas-Copeland, CEO, **DDB North America**

» "Once the dust settles and the new world begins, the vigor and wealth of resources must still be there in order to ensure people are more valuable than profits."—Keni Thacker, founder, **100 Roses from Concrete**

» "My conviction in this crisis is that you have to trust that your team will do the right thing."—Arthur Sadoun, CEO, **Publicis Groupe**

» "Agencies need to adapt and deliver exactly what clients want. The one thing I know is: I listen to clients. I understand what they want, and then I build the teams to deliver it."—Marty O'Halloran, global CEO, **DDB**

» "Holding companies were financially constructed and when they got large, they wanted to create an integrated experience. But there was too much culture clash."—Dave Sackman, CEO, **Material**

» "As more marketers embrace in-housing, they are looking for different types of agency partners with on-demand skills to plug into their processes. They need to dedicate someone in procurement to design a new partnership structure that recognizes the value of smaller partners and start-ups who charge differently." —Ed Rogers, co-founder, **Been There Done That (BTDT)**

» "The more noise we all create for change is better. If there are 100 groups making more noise, I'm all for it. I wish we didn't have to exist."—Fahad Khawaja, founder, **Hue**

NEW Company profiles:

- **Highdive Advertising** (**https://highdiveus.com**) is an independently owned, Chicago-based, boutique ad agency with approximately 25 employees. Their mission is to "build the healthiest client/agency relationships in the world," inviting clients "to dive in together." Their capabilities include strategy, film, print, in-store, design, radio, mobile, digital, and social. Their approach is based on "fearless creativity," a whiteboard culture, one-sided tables, and top performance. They received the 2020 Small Agency of the Year, Gold award by Ad Age. Clients include FCA/Jeep, Maserati, Barilla, Nike, Boost Mobile, Rocket Mortgage, Marriott, etc.
- **Sensis** (**https://www.sensisagency.com**) is an LA-based integrated cross-cultural marketing agency that creates "mutually beneficial relationships between businesses and people," leveraging cross-cultural insights combined with purpose and emotional resonance. Their capabilities include creative, media, strategy, technology, earned media, mobile, research and analytics, challenges, and CMO consulting services. Clients include the city of LA, AltaMed, FDA Center for Tobacco, San Diego Gas & Electric, UCLA, Metrolink, and now the Census Bureau.
- **Collectively** (**https://collectivelyinc.com**) Collectively is an award-winning social influence company that combines the right technologies with strategies informed by social influencer data. Their capabilities include strategy, casting, community management, campaign execution (e.g., contracting and licensing, influencer management, content reviews, etc.), content/video production, experiential, paid social, social listening/benchmarking, and ROI analysis. Clients include Eos, Coty, Malibu, HP, Sephora, Delta, GMC, Intel, and Clinique. They won Gold for the Influencer Marketing Awards 2020 "Best Large Influencer Marketing Agency" as well as "Best Food & Drink Campaign" Gold Winner (Absolut) and "Best Brand Engagement Campaign" Finalist (LinkedIn). All senior leaders at Collectively are female. They are now part of "brandtech" firm You & Mr Jones as of August 2020.

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Check out our new poster: ***Top 15 Agencies in the World*** based on 2019 revenue. Note that Accenture Interactive is now the 4th largest agency in the world, ahead of Interpublic Group (IPG). Download your e-copy for free at **www.agencymania.com/contact**.

WORK: producing great work and outcomes

The ad world has the opportunity but also the duty to make a real, meaningful, lasting change in the fight against racism. The level of commitment and support has been heart-warming with real change and hope that translated into new work. Content marketing is on the rise. Adopting best practices such as client briefing that results in providing actionable feedback have never been more important than they are now. The use of AI in advertising is also on the rise, going from science fiction to practical applications. So is the desire to use creative ways to engage consumers in digital environments. Digital transformation is top of mind. A new world requires a new way to approach the work and deliver on it.

- The **ANA** is converting its conferences to virtual events like Media & Measurement, Digital Marketing, and Agency Financial Management, including one of its biggest events of the year, the 2020 Masters of Marketing Conference.
- Car manufacturer **Nissan** unveiled the interactive showroom of the future (The Nissan Pavilion in Yokohama, Japan) allowing customers to experience its newest electric vehicle virtually. The showroom created by TBWA\ Hakuhodo, includes a vibrating floor, a 4K projection screen, and a cafe served by ProPILOT robot waiters.
- Auto brand **Buick** collaborated with its agency Leo Burnett to launch a marketing campaign with Amazon Alexa including a virtual showroom on Amazon, a custom Alexa "utterance," and spots running across broadcast, social media, targeted online video, and OTT (over the top) media like Amazon Fire TV.
- Food giant **Burger King** and its agency Buzzman launched a campaign inviting customers, via social media, to request BK face masks featuring their orders to avoid having to speak when they get to the drive-thru window or the counter.
- **MediaMonks** landed Creative Artists Agency, serving as its agent to help brands navigate Hollywood deals and content partnerships—including interactive digital content in entertainment and sports—more effectively and in a timelier manner.
- Holding company **WPP** signed up with end-to-end design and development platform InVision to enable their teams (WPP's full roster of creative agencies, which includes global networks Wunderman Thompson, VMLY&R, Ogilvy, and others) and their clients to collaborate virtually and create digital content, campaigns, and other products.

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- An article by Thomas Kolster, founder and creative director of Goodvertising Agency—"You're selling running shoes, don't pretend you're saving the world"—wisely invites brands to avoid "**The Hero Trap**" (also the title of his new book).
- Per Advertiser Perceptions, **the average amount of time for US media plans** fell to just 2.3 months post-pandemic vs. 4.2 months pre-pandemic (or 45% faster). 87% claim that flexibility is the name of the game for the duration of negotiating contracts with media partners.
- **Publicis Sapient** launched a new B2B content platform called "The How Channel," a resource for executives looking for "cut-to-the-chase" content (including videos, interviews, guest speakers, etc.) on the "how" of digital transformation.
- Through the ANA, Laurence Minsky, associate professor, Columbia College Chicago actively promoted briefing practices and "**cascading briefs**." The concept is based on "a connected briefing architecture" where the marketing program includes a "series of sub-briefs that are all linked to a foundational master document and speak the language of the specific channel specialists" (mobile, shopper, broadcast, experiential, PR, data analytics, and others).
- Per the ANA, **content marketing budgets** are up 73% on average over the two prior years. 63% of content marketing services are handled internally. All brands reported relying on at least one agency partner to assist with content marketing initiatives.

Noteworthy quotes:

» "I see huge transformation happening in brand building. It's already accelerated about five years in these last few months because of what's happening with the pandemic. That virtual world is going to create some real transformation in every aspect of brand building, media, and advertising."—Marc Pritchard, chief brand officer, **Procter & Gamble**

» "The best clients apply the greatest scrutiny and work the hardest during the briefing through the concept stage." —John Long, executive creative director, **Ogilvy NY**

» "We live in such divided times; we definitely don't need another politician or sports apparel company to tell us we're wrong (or right) but rather someone who can help us in our constant struggle to live. Don't talk, just do it!"—Thomas Kolster, founder and creative director, **Goodvertising Agency**

» "Most agencies now have about six months of pandemic experience. Ask them how they have managed flying by the seat of their current clients' pants. It will be instructive to assess if they will be able to flex for you as well." —Maarten Albarda, senior lead, **Flock Associates Limited**

» "There will be fewer and smaller agencies that are just as capable, if not more capable, because they'll lean on technology for basic tasks—like a bot that takes notes for you during a call, that processes the paperwork to hire an influencer for a campaign, or does audience analysis for a media planner."—Jay Pattisall, principal analyst, **Forrester**

» "There are always going to be clients that want to pick and choose specialist agencies, but we are also seeing an increasing desire for things to be more joined up in terms of agencies working and collaborating really well together."—Marty O'Halloran, global CEO, **DDB**

» "If you don't think your agency's creatives are better craftspeople than you are, you should probably find another agency."—John Long, executive creative director, **Ogilvy NY**

FINANCIALS: driving efficient use of resources

In this sharp economic downturn, a tech giant seems to perform particularly strongly. Apple surpassed the $2 trillion valuation, a first for any US publicly traded company, only two years after achieving a $1 trillion stock market valuation, becoming the world's most valuable company. In the meantime, holding companies posted sharp declines due to the pandemic. Most agencies are aggressively restructuring, addressing weaknesses in their offering and now highly exposed operating model, as well as implementing cost reduction plans in response to budget cuts or delays that impact their operations and staffing resources. Yet the focus in months to come will be on rebuilding, with a stronger, perhaps leaner, more flexible financial and staffing model that will allow them to thrive during the crisis and after it ends.

- Per the three largest agency holding companies and their media firms (WPP's GroupM, IPG Mediabrands' Magna, Publicis Media's Zenith), **US and world ad economies** will decline 6.3% and 9.4% respectively. For 2021, they expect to see a rebound—1.9% in the US and 6.7% worldwide. Per Zenith's recent updated forecast, global advertising expenditures will shrink 9.1% in 2020 to $572 billion (saved mostly by the US elections in November and US expenditures expected to be down only 7%), reaching $606 billion in 2021 and $636 billion for 2022. Digital advertising will account for 51% of global ad spend in 2020.
- Ecommerce giant **Amazon**, now one of the largest advertisers, increased worldwide spending on advertising and other promotional spend to $11 billion in 2019, a 34% YOY increase. Per Ad Age, Amazon spent $47B in advertising and promotion (or 3.5% of sales) in the past 25 years.
- Digital transformation is widespread. Per Twilio, 97% of brands believe the COVID-19 pandemic has accelerated their **digital transformation** initiatives, with 26% significantly increasing their budgets.
- Consumer packaged goods giant **Procter & Gamble** changed the game and negotiated ad deals for the upfronts 2020-2021 TV season outside of its traditional media agencies.
- Per Uplers, 68% of **digital agencies** experienced revenue declines during the past few months and 80% are looking into or increasing outsourcing for staff flexibility.

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Column: Keeping up with the fast-paced advertising production community

by Jillian Gibbs, Founder and Global CEO, APR

FIND OUT FROM APR HOW 2020 HAS IMPACTED CONTENT CREATION TRENDS:

Visit **aprco.com/news** to learn how some of the largest brands manage their in-house production teams, explore the evolving possibilities of MarTech, and revisit APR's 2020 Content Creation Trends in light of the sweeping changes rippling throughout our industry. Current articles include:

1. Google, Coca-Cola, Allstate Weigh in on Client In-House Production

Leading brands and Dragons Group divulge their secrets to managing in-house production teams during these uncertain times. **Read more here**.

2. DCO & Programmatic Creative: Six Actionable Production Tips

How are marketers actually utilizing MarTech in real-world production environments? We sit down with five Marketing innovators to learn more. **Read more here**.

3. 2020 Content Creation Trends: 2.0

Revisit our 2020 Content Creation Trends with a timely update, expanding upon the various ways global events have transformed content creation. **Watch here**.

4. Global Production Location Tracker

Don't forget to check our **Global Production Location Tracker** for the latest on safe live action shoots and event activations across the globe—updated daily.

- Did the **Facebook** boycott work? Not so much. Despite an unprecedented boycott by major brands like Unilever and Coca-Cola, Facebook posted revenue growth of 11%, showing that small businesses still tapped the social network giant's digital resources and tools. The company reported strong 2Q results-revenue of $18.7B (+12% YY) with ad revenue growing 10% YoY, strong of its "C-Cubed" (Commo, Connecting, Commerce) platform, 2.5B users and 9MM+ advertisers and fueled by immersive free-of-charge and easy to set up Facebook Shops (which launched in May).
- "Don't Cut Your **Marketing Budget** in a Recession" was a recent article in the Harvard Business Review, citing that "Companies that have bounced back most strongly from previous recessions usually did not cut their marketing spend, and in many cases actually increased it." Example: P&G increased its advertising spend 8% to $7.33bn, its first increase for four years. Unilever is also planning to increase marketing spend in H2.
- After a "defensive posture" led the brand to cut Q2 marketing spend by 70% in the US, **McDonald's** committed to adding $200M in incremental marketing spend across the United States and its top international markets in H2.
- CPGs like Kraft Heinz and Kellogg are planning to **shift marketing investments**, and, in some instances, increase spend in H2 with Kraft Heinz anticipating a 40% increase in working media dollars (advertising and promotion) versus a year ago. Yet, CPGs are also looking into cutting marketing spend in other areas (e.g., sports events).
- Brands like Unilever, Mars, and Clorox Co. are presumed to have notified small and medium-size agencies and other suppliers that **payment terms** are capped at 60 days in a sign of solidarity for cash-strapped agencies, instead of their usual 90- and 120-day payment terms. Some consider expedited payments on a case-by-case basis.
- **S4 Capital Group** reached a $2bn valuation by building through acquisitions of key assets motivated by maintaining entrepreneurship, shared equity and incentives, balancing management and control.
- Per eMarketer, 2020 **US podcast spending** is expected to reach $782M despite the crisis. The US podcast advertising marketplace is on pace to top $1 billion in 2021 (44.9% increase to $1.1 billion) with 115.6 million listeners.
- Even though most brands conduct **agency reviews** on a three- to five-year cycle, per AdExchanger's 2020 industry outlook report, 63% of brands reevaluated their media agencies—or will do so—but will also reevaluate their partnerships with data partners (56%), measurement partners (44%), and consultants (19%).

Holding companies:

» **Omnicom Group** reported a revenue decline of 24.7% to $2.8 billion in Q2 as well as a net loss for the quarter of $24.2 million (compared to last year's net income gain of $370M). Global organic revenue declined 23% during that period (MEA at 39.4% and Europe at 29.4%). The firm significantly reduced expenses and staff (6,100 employees).

» **Dentsu Group** reported net revenue down 9% to ¥408.9 billion ($3.9 billion) with an organic revenue decline of 8.9% for the first half of the year. The US proved stronger with an organic decline of only 6.9%. The firm is cutting costs, simplifying the company's business, and strengthening its integrated solutions strategy.

» **Publicis Groupe** reported net revenue increased overall by 2.6% but a total organic sales decline of 13% to €2.29bn (7.6% in the US, 23.5% in Europe, 5.7% in APAC, 202.2% in LATAM, and 23.5% in MEA). The firm implemented staff cuts/furloughs, salary reductions across agencies, (e.g., Epsilon, Arc Worldwide and BBH), saving €286m out of the targeted €500m in cost-savings.

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Newly acquired data analytics firm Epsilon is presumed to have played a "massive" part in reducing exposure for agencies like Saatchi & Saatchi and Digitas as brands want to take back control of their own first-party data.

» **Interpublic Groupe (IPG)** reported a decline in organic revenue of 9.9% (8% reduction in the US, 14% in APAC, etc.) to $1.85 billion in Q2, less severe than expected due to healthcare companies making up more than a quarter of IPG's client base. Like other agencies, IPG implemented cost-cutting measures hoping to reach $80 to $90 million in savings (e.g., office space) combined with layoffs, furloughs, and salary decreases across all of its agencies.

» **Vivendi-owned Havas Group** reported negative organic growth of -18.3% and revenues of €1,019 million or a reduction of 8.5% with all agencies experiencing revenue loss, except for Havas Health & You. Havas reported that it had absorbed nearly half the decline in revenues as a result of its cost-reduction plan.

» **MDC Partners** reported an 8.3% decline in revenue to $259.7 million in Q2 and a 26.4% drop in organic revenue. MDC Partners claimed it achieved $82 million in cost savings in Q1 alone. Recent client wins include Coca-Cola, Budweiser, and Skyy Vodka. The merger of The Stagwell Group and MDC Partners would produce significant cost synergies (up to $35M).

Noteworthy quotes:

» "If your company has a history of cutting advertising in a down market, you'd better get your story straight about why this is a terrible idea. This has been researched for about 80 years. If you're in planning mode, arm yourself to wrestle over budgets."—Russ Findlay, CMO, **Hiscox**

» "Budgets will be more under pressure than usual. It is impossible to do everything. In fact, it is better to do less, better."—Julian Barrans, business director, TrinityP3

» "This is the new standard. I don't want to go back to every spot being half a million dollars."—Chris Brandt, CMO, **Chipotle**

» "There's more pressure than ever on agencies to perform with marketers expecting more for less." —Greg Paull, co-founder and principal, **R3**

» "Our second quarter, as expected, bears the imprint of the pandemic and its economic impact, and the most challenging global operating environment in memory." —Michael Rothsaid, CEO, **IPG**

» "[In terms of clients in-housing, often] what looked like a cost-saving initiative, eventually ends up not saving money because you can't attract the right talent, and they end up being inefficient."—Marty O'Halloran, global CEO, **DDB**

» "The sands are shifting, and it requires that marketers, heads of media, and their agencies stay on their toes." —Jay Pattisall, principal analyst, **Forrester**

Check out our poster and **article**: ***"Partnering for Success and Survival"*** to read what we've learned over decades about top-performing partnerships and how to achieve long-term success.

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PERFORMANCE: driving stronger performance and value from the partnership

The impact on performance is not being felt consistently across industries. Healthcare and the technology sectors are doing relatively well, despite the economic environment. However, retail, telecom, and food and beverage brands see ups and downs, while transportation, financial services and industrials are hit the hardest. It's not stopping agencies from coming up with innovative concepts, some of which are recognized with industry awards and perhaps better, more valuable outcomes: repeat business and client loyalty. That's gold.

- **Small Agency of the Year** Gold was awarded to Chicago-based shop Highdive (clients include FCA/Jeep, Rocket Mortgage, etc.). Runner-up went to San Francisco-based Camp + King (clients include Papa John's, RE/MAX, etc.). International Small Agency of the Year went to London-based Uncommon, followed by Brazil's Tech & Soul. Other winners: Superconductor (1-10 employees), Yard (11-75 employees) and No Fixed Address (76-150 employees).
- **Fred & Farid** Los Angeles received "Newcomer Agency of the Year 2020" at the Ad Age Small Agency Awards. Fred & Farid New York received a gold in Integrated Campaign for the Last Column campaign developed with CPJ.
- Per Lomit Patel, vice president of growth at IMVU, the **core skills** that make a successful modern Chief Marketing Officer (CMO): 1) Team leadership, 2) Adeptness with data, 3) Practiced in personalization, 4) Proficient in AI and machine learning, 5) Traditional skills.
- Per the World Federation of Advertisers, advertisers increasingly shifted to **independent and/or in-house trading** models with the primary effect being greater cost transparency. 84% are utilizing a "Brand Trading Desk" (managed in-house or via some form of hybrid in-house model).
- Following in the footsteps of Target and Walmart, **CVS Pharmacy** launched a new advertising platform, CVS Media Exchange (aka cMx) targeted at CPG brands, allowing them to efficiently reach up to 74 million CVS consumers.
- Despite budget uncertainties resulting from the health crisis, **Amazon's ad business** is growing strong, with average daily spend on Amazon's platform increasing for both Sponsored Brand ads and Sponsored Product ads.
- **Partnership for Responsible Addressable Media** launched recently, with representatives from industry organizations, advertisers (including IBM, GM, Unilever, P&G, and others), agencies, and ad-tech companies like Adobe, with the goal to convince firms like Google/Apple to reconsider decisions that limit their ability to track people on websites and apps.
- **2020 Echo Award winners** across 21 categories. The Diamond ECHO Award went to the "HIV on the Agenda" campaign (Fundación Huésped and agency Wunderman BA) and USPS Gold Mailbox Award ADT Fire Safety VR Experience (ADT and agency Harte Hanks). A few examples: Best Use of Emerging Technologies Gold: Kupu (Spark and Colenso BBDO). Best Use Of Branded Content Gold: I'm Drinking it For You (DB Breweries and Colenso BBDO). Best Integrated Campaign Gold: SickKids VS—Crews (SickKids Foundation and Cossette).

Noteworthy quotes:

» "Agencies should emphasize their breadth of knowledge and experience navigating similarly treacherous times."—Oscar Orozco, senior forecasting analyst, **eMarketer**

» "No matter the size of your brand, being an agile marketer is more important than ever."—Angela Zepeda, CMO, **Hyundai Motor America**

» "Once you develop an analysis of your successful partnership, codify and share it within your company to accelerate the performance of other partnerships across the business."—Christine Moorman, Austin Finch, Sr. professor of business administration, Fuqua School of Business, **Duke University**

» "If you wake up in the morning, your heart will be in your mouth if you have something at risk."—Sir Martin Sorrell, executive chairman, **S4 Capital Group**

R3 Latest Global Creative New Business Wins *Global/June 2020*

RANK THIS MONTH	RANK LAST MONTH	AGENCY	ESTIMATED YTD WIN REVENUE (USD $M)	EST. OVERALL YTD WIN REVENUE (USD $M)	NO. OF WINS
1	1	VMLY&R	64.8	61.4	84
2	2	Droga5	53.5	53.5	4
3	3	Wunderman Thompson	43.0	42.5	138
4	5	Ogilvy	39.2	39.2	160
5	4	GSD&M	50.0	37.5	1
6	15	Isobar	36.8	36.8	102
7	6	Grey Group	32.2	31.8	37
8	7	Deutsch	24.0	24.0	1
9	9	Sapient	18.9	18.8	17
10	10	MullenLowe Group	23.4	18.7	37

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R3 Creative Agencies New Business League *US/June2020*

RANK THIS MONTH	RANK LAST MONTH	AGENCY	RECENT WINS	ESTIMATED YTD WIN REVENUE (USD $M)	RECENT LOSSES	EST. OVERALL YTD WIN REVENUE (USD $M)	NO. OF WINS
1	1	Droga5	Hershey US, Allstate US, Maserati Global, Reform Alliance US	52.9	-	52.9	4
2	2	GSD&M	Capital One US	50.0	Popeyes US	37.5	1
3	3	VMLY&R	Intel Global, BASF Agricultural US, The Lee Brand Global, YMCA of the USA Digital	30.2	Bumble Bee US	29.8	4
4	4	Grey Group	Discover US, Ecolab US	27.5	-	27.5	2
5	5	Deutsch	Petsmart US	24.0	-	24.0	1
6	6	Wunderman Thompson	Samsung Mobile Social, Unilever-Horlicks/Viva US, Johns Hopkins Health System Corp US Project	23.7	-	23.7	17
7	7	Gut	Popeyes US, Headspace US	12.8	-	12.8	2
8	8	McGarryBowen	Asahi Super Dry Global, Manhattan Mini Storage US	11.9	-	11.9	3
9	9	MullenLowe Group	Axe US, Corona US, Corona Seltzer US, Simplisafe US, Canada Goose US CRM	15.4	US Cellular US	11.0	12
10	11	Wieden & Kennedy	Heinz Ketchup US	8.0	-	8.0	1

R3 Media Agencies New Business League *US/June2020*

RANK THIS MONTH	RANK LAST MONTH	AGENCY	RECENT WINS	ESTIMATED YTD WIN REVENUE (USD $M)	RECENT LOSSES	EST. OVERALL YTD WIN REVENUE (USD $M)	NO. OF WINS
1	1	Initiative	Salesforce Global, Gilead US, Groupon US Project, El Pollo LocoUS, Citrix Global	20.6	-	20.6	5
2	2	PHD	Casper US, Lindt US	15.7	-	15.7	7
3	26	Horizon Media	CBS US, Sally Beauty Holdings US, Stamps.com US	32.2	WW US	12.4	14
4	21	Dentsu Aegis Network	Kroger US, Generali Global	10.8	-	10.8	3
5	4	Digitas	Sephora NA, Edgewell Personal Care, Feminine Care US	10.8	-	10.8	2
6	6	MediaCom	Hasbro Global, Duracell Global, Headspace US, Farfetch Global Project, Herbal Essences US Project	9.5	-	9.5	5
7	5	Starcom	Deoleo Global, Jos A Bank N America	9.0	Duracell Global	9.0	2
8	7	Vizeum	Mccormick US	6.4	-	6.4	1
9	-	Essence	One Medical US Project, The North Face US, Airbnb Global	4.3	-	4.3	3
10	8	Connelly Partners	Liberty Bank US	4.0	-	4.0	1

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R3 Creative Agencies New Business League *Global/June2020*

RANK THIS MONTH	RANK LAST MONTH	AGENCY	RECENT WINS	ESTIMATED YTD WIN REVENUE (USD $M)	RECENT LOSSES	EST. OVERALL YTD WIN REVENUE (USD $M)	NO. OF WINS
1	1	VMLY&R	The Lee Brand Global, YMCA of the USA, Clorox China, Mediacorp Singapore Project	64.8	Bumble Bee US	61.4	84
2	2	Droga5	Allstate US, Maserati Global, Reform Alliance US	53.5	-	53.5	4
3	3	Wunderman Thompson	HSBC Global, Samsung Mobile Social US, MengNiu China, Sugarlite APAC, GSK China Project	43.0	Hershey India	42.5	138
4	5	Ogilvy	Comvita Honey China Project, Pernod Ricard HK Project, Samsung Taiwan Project	39.2	-	39.2	160
5	4	GSD&M	Capital One US	50.0	Popeyes US	37.5	1
6	15	Isobar	United Way of Greater Kansas City US, Gota Media AB Sweden Project, Amway Korea Project	36.8	-	36.8	102
7	6	Grey Group	Discover US, Walgreens Boots Alliance US, Lindt & Sprüngli US, Ecolab US	32.2	DELL India	31.8	37
8	7	Deutsch	Petsmart US	24.0	-	24.0	1
9	9	Sapient	Mercedes-Benz China Project	18.9	-	18.8	17
10	10	MullenLowe Group	Corona US Social Media, Canada Goose US CRM, Simplisafe US, Citi Australia	23.4	US Cellular US	15.4	37

R3 Media Agencies New Business League *Global/June2020*

RANK THIS MONTH	RANK LAST MONTH	AGENCY	RECENT WINS	ESTIMATED YTD WIN REVENUE (USD $M)	RECENT LOSSES	EST. OVERALL YTD WIN REVENUE (USD $M)	NO. OF WINS
1	1	Mindshare	WW US, John Deere (B2B) US, Airstar Bank Hong Kong	61.3	Pandora US & Canada	52.2	91
2	2	OMD	Canva US, McDonald's Spain, Air France France	72.2	CBS US	45.5	181
3	3	MediaCom	Duracell Global, P&G Turkey, Cinch UK, Farfetch Global Project, Farfetch UK	50.5	Discovery Bank South Africa	42.8	159
4	4	PHD	Bytedance Singapore, Audemars Piguet Hong Kong, 3HK Hong Kong	50.0	Sainsbury's UK Digital	36.6	117
5	6	Wavemaker	Bytedance China, Tencent Holdings China, Bungie Global, L'Oréal Indonesia	38.9	Air France US	34.3	66
6	5	Initiative	Citrix Global, El Pollo Loco US, Dienst Pubiek & Communicate Netherlands	34.1	Intersnack Europe	31.9	59
7	7	Starcom	Deoleo Global, Kraft Heinze Commerce China, McDonald's China Planning, Dyaco Taiwan	21.9	Duracell Global	18.1	25
8	9	Carat	Pandora US & Canada, Lionsgate UK, Kangshifu Noodles China	38.6	H&M Denmark	17.3	120
9	8	Zenith	The Y Australia, Mobile Premier League India, DBS Bank Taiwan	21.6	Iberdrola Spain	15.5	10
10	-	Horizon Media	CBS US, Sally Beauty Holdings US, Stamps.com US	32.2	WW US	12.4	14

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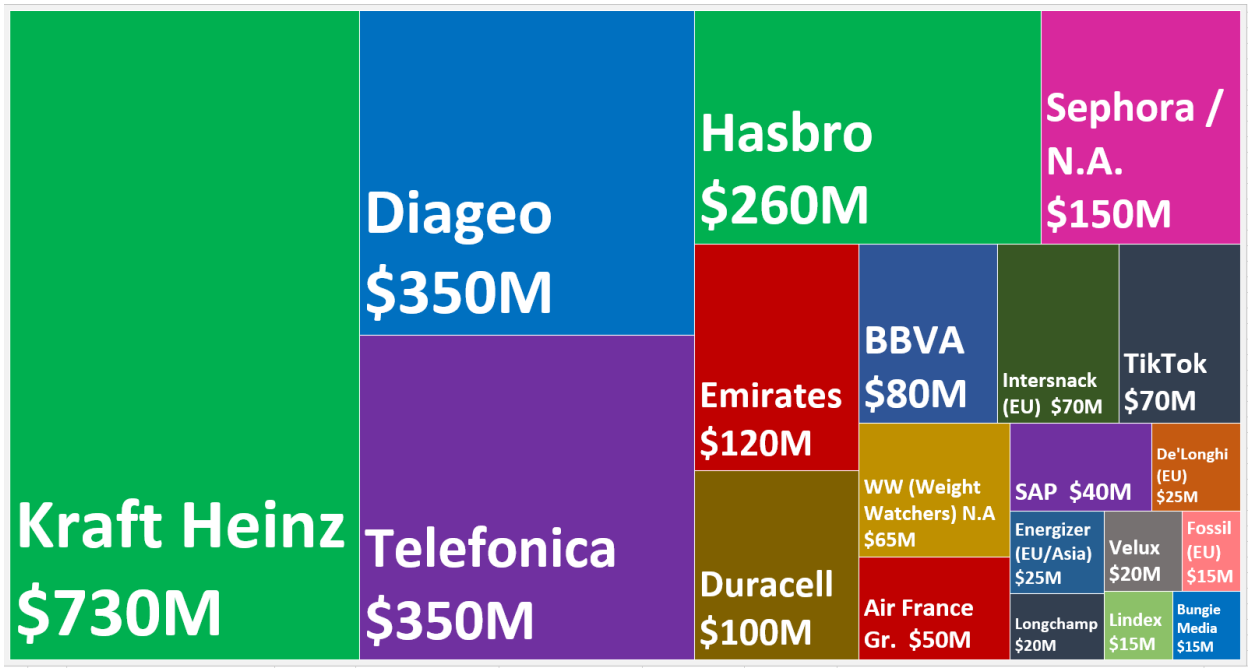
TOP 20 CONCLUDED GLOBAL & MULTI-COUNTRY MEDIA REVIEWS 2020



* Budgets are sourced from COMvergence's estimated NET 2019 adspend across 45 key markets

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SPOTLIGHT ON THE MAJOR GLOBAL & REGIONAL MEDIA PITCHES

MAJOR CONCLUDED GLOBAL & MULTI-COUNTRY MEDIA REVIEWS 2020

	Advertiser	Geo scope	Net media spend 2019 (in $US M)	Duration of the pitch	Winner(s)	Main incumbent(s)	Pitch consultant	Date of announcement	Other relevant details
1	**Air France Group**	Global	50	7 months	**OMG / OMD** all countries except US, China, Germany (Hearts & Science)	Wavemaker / MediaCom	*VT Scan*	Q2 2020	Following a global pitch launched in November 2019, Air France Group has selected Omnicom for its **creative and media account globally**. Omnicom Media Group (OMG) will handle the media part for all AF group brands, starting on **Oct. 1st 2020**. More precisely, OMD will handle Air France except in the **US, China and Germany** where it will be served by **Hearts & Science**. Also, Re-mind PHD will look after the Transavia brand in France and Portugal. TBWA and Proximity will handle the creative, strategy and marketing parts. **Performics** remains the performance/search agency for Air France until March 2021.
2	**BBVA**	Global	80	4 months	**Mindshare**	Mindshare	*Scopen*	Q1 2020	Spanish bank BBVA is dividing its global media and digital duties between **Mindshare** and **Accenture Interactive**, following a review process that launched in November 2019. The competitive process, which included various international ad agencies, has ended with **media management going to Mindshare** and **digital ecosystem responsibilities being awarded to Accenture Interactive**. This split means that Mindshare has retained mass media buying business globally, while adding digital sales in Turkey and Spain to its remit.
3	**Bungie Media**	Global	15	-	**Wavemaker**	-	-	Q3 2020	Game developer Bungie has appointed **Wavemaker** as its agency partner to handle its media buying and planning in key markets including **North America, Europe and APAC**. The studio owns franchises including Marathon, Myth, Halo, and Destiny.
4	**De'Longhi**	Europe (30 countries)	25	4 months	**Mediaplus**	**Mediaplus** (Germany, Belgium); **MediaCom** (Spain); **dentsu X** (Austria)	*ebiquity*	Q1 2020	De'Longhi awarded its EMEA media account to Mediaplus. The 30 countries that are part of the account include **Germany, the UK, Italy, Spain and Russia**, as well as **the Middle East**. In addition to De'Longhi, this new account also covers the company's brands Kenwood and Braun household. The account covers the areas of strategy, planning and purchasing. In addition, the implementation of a new organizational model will allow the De'Longhi Group to effectively **bring in-house the management of 20 percent of media spending.**
5	**Diageo**	Global	350	6 months	**PHD**	**Carat** (most markets); **Spark Foundry** (Australia, Middle-East); **Mindshare** (China, HK, SK)	*Media Sense*	Q1 2020	**A PHD-led team from Omnicom Media Group** has won Diageo's global media planning and buying account in virtually all of the key markets around the world. Isabel Massey, global media director at drinks giant Diageo, said **OMG will be "our media agency of record" and PHD will be "our strategic media lead"**. Dentsu Aegis Network's Carat was the main incumbent, which faced off Publicis Media and OMG in the final stage. The review began in September 2019.
6	**Duracell**	Global	100	6 months	**MediaCom**	**Starcom / Spark Foundry**	*ID Comms*	Q2 2020	MediaCom has been named Duracell's global media agency of record in **32 markets** including the US, UK and China, effective **July 1, 2020**. The remit includes media buying and planning. The award follows a formal review that began last November 2019. Incumbent **Starcom did not participate in the review.**

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MAJOR CONCLUDED GLOBAL & MULTI-COUNTRY MEDIA REVIEWS 2020

	Advertiser	Geo scope	Net media spend 2019 (in $US M)	Duration of the pitch	Winner(s)	Main incumbent(s)	Pitch consultant	Date of announcement	Other relevant details
7	**Emirates**	Global	120	7 months	UM / Mediabrands	Havas Media	-	Q1 2020	**Mediabrands** has landed the airlines' global media account after a competitive review. **Havas**, the incumbent (having won the business back in 2014 and again having the account renewed in 2017) and **WPP** were among other groups that took part in the pitch. The media review began in **July 2019**. Data is known to have played an important role in the pitch.
8	**Energizer**	Global (outside of N.A)	25	*no review*	UM	Wavemaker	-	Q2 2020	The appointment, which came **without a review**, marks an expansion of the company's relationship with UM after Energizer Holdings selected UM as its North American media agency of record in early 2019. Now, as global media agency of record, UM will be responsible for media strategy, planning, buying, research, data and analytics across Energizer Holdings' automotive, battery and portable lighting brand portfolio.
9	**Fossil**	EMEA	15		m/SIX	Vizeum	-	Q1 2020	m/SIX has been charged with driving brand performance and growth at scale across EMEA. The agency's work with Fossil Group, across both owned brands like Fossil and Skagen and licensed brands such as Armani Exchange, Diesel and Emporio Armani, begins with immediate effect and **will be run from the m/SIX offices in the UK.**
10	**Hasbro**	Global	260	6 months	MediaCom	**OMD** (most markets); **MediaCom** (LatAm)	-	Q1 2020	Hasbro has consolidated its global media buying and planning business, including in North America, with MediaCom. Hasbro previously consolidated its global media business with **OMD in 2013** and handed buying and planning duties in Latin America to MediaCom at the time. There wasn't **any consultant involved in the process**. Hasbro ran the pitch.
11	**Intersnack**	EMEA	70	7 months	Starcom	D.A.N; Mediabrands	*Aperto One*	Q1 2020	Intersnack has consolidated its media planning and buying for **21 European markets** with Publicis Media. Previously split largely between Dentsu Aegis Network and Mediabrands, the win concludes a review that kicked off in **July 2019**. It was handled by strategic and commercial consultancy **Aperto One**. The media pitch followed a creative review held last year that resulted in KP Snacks consolidating its business with St Luke's and Engine.
12	**Johnson & Johnson**	Australasia (AU/NZ)	12	3 months	Hearts & Science	UM / FCB Media	-	Q1 2020	Johnson & Johnson Consumer Health Australia and New Zealand appointed Omnicom Group as its lead agency following a competitive review. **The newly created Omnicom Group multi-disciplined team** will provide services including creative, media, digital, public relations, healthcare, social and shopper marketing. It will draw talent from across Omnicom's ANZ suite of agencies and sit within DDB Group.
13	**Kraft Heinz**	Global	730	8 months	Starcom (US), **Carat** (rest of the world)	Starcom	*Media Sense*	Q3 2020	**Carat** takes on the lead agency role in the development of global projects and capabilities with Kraft Heinz's Amsterdam-based global media team. Four media agencies participated in the eight-month review. Kraft Heinz and **Starcom** have worked together for 20 years and Starcom Worldwide had handled global media buying and planning for Kraft Heinz since 2018.

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SPOTLIGHT ON THE MAJOR GLOBAL & REGIONAL MEDIA PITCHES

MAJOR CONCLUDED GLOBAL & MULTI-COUNTRY MEDIA REVIEWS 2020

	Advertiser	Geo scope	Net media spend 2019 (in $US M)	Duration of the pitch	Winner(s)	Main incumbent(s)	Pitch consultant	Date of announcement	Other relevant details
14	**Lindex**	Nordics, Slovakia, CZ, Baltics	15	6 months	dentsu X / Vizeum	*various*	-	Q1 2020	The dentsu X/Vizeum collaboration begins in **Q1 2020**. The partnership will be **led from Gothenburg** via Dentsu and includes the markets Sweden, Norway, Finland, Estonia, Latvia, Lithuania, the Czech Republic and Slovakia.
15	**Longchamp**	Global	20		Zenith	OMD	-	Q1 2020	Longchamp concluded global media and creative reviews in Q1 2020, with Zenith winning media and FF winning creative.
16	**SAP**	Global	40	6 months	OMG *North Star*	PHD	*ID Comms*	Q3 2020	Omnicom Media Group was named media agency network of record for global software giant SAP. The remit includes **SAP's global paid media planning and buying activities**. OMG-owned **PHD has held SAP's media account since 2015**. North Star, a customized media unit will draw talent, tools and technology from the entire OMG network.
17	**Sephora**	North Am.	150	5 months	Digitas *Power of One*	Dentsu X	*ID Comms*	Q2 2020	LVMH's Sephora brand has selected Publicis Groupe as its media agency of record for North America, following a review managed by ID Comms, The review started in November 2019, with all major holding companies invited to participate, and concluded in April 2020. A Publicis Groupe **"Power of One"** solution led by Digitas will handle the account.
18	**Telefonica**	Multi-country	350		Havas Media Group	Havas Media Group	-	Q2 2020	Telefonica has once again awarded its global media account to Havas Media Group and **extends the partnership between the two companies**. The international telecom company, which owns key brands Movistar and O2, renewed the relationship **after a thorough process**. Havas Media Group has been Telefónica global media partner since 2014 in Spain, UK, Germany and Hispam.
19	**TikTok**	Global	35		Zenith	PHD	-	Q3 2020	Zenith takes the TikTok account from Omnicom Media Group's **PHD, which only won the business in August 2019**. Surprisingly, PHD won the assignment even though it has a potential client **conflict with Google**, for which the agency also handles lead media duties. Google's YouTube is a major TikTok rival.
20	**Tommy Hilfiger**	North Am./ Europe	10	6 months	Crossmedia	D.A.N.	*Media Sense*	Q1 2020	Crossmedia won the international account following a competitive review managed by Media Sense. Crossmedia competed against **Essence, MullenLowe Mediahub** and a team from Dentsu Aegis Network along with independent **Local Planet**.
21	**Velux**	Europe	20		Carat	*various*		Q2 2020	Following a pitch, the VELUX Group has chosen media agency Carat. It concerns an international collaboration in **26 different countries**. Carat is responsible for media strategy, planning & buying of both **digital and non-digital media**.
22	**WW** (Weight Watchers)	North Am.	65		Mindshare	Horizon Media	*Medialink*	Q2 2020	After a review handled by MediaLink, **WPP's integrated team, led by Mindshare**, was awarded key pieces of the North America business and media planning responsibilities. The integrated team draws on the best of WPP, leveraging Mindshare, **Neo** and **Wunderman Thompson**.

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AGENCY REVIEWS AND ROSTER CHANGES

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

- **Pacific Foods** selected 72andSunny as its lead creative AOR, following a review.
- **LG Electronics** retained WPP's LG-One group as its global communications partner, which is composed of PR firm Hill+Knowlton Strategies (H+K) and Ogilvy PR. WPP formed LG-One in 2009 to service the account in areas including global corporate communications, consumer electronics, home appliances, mobile communications, and B2B.
- **Cox Automotive** (parent company of Autotrader.com and Kelley Blue Book) selected Omnicom Media Group agency Hearts & Science to handle its US media planning and buying, following a review and replacing incumbents MDC's Assembly and Dentsu Aegis Network's 360i.
- **Coca-Cola** selected MDC Partners-owned Anomaly as its new creative AOR for Coke in the US, replacing 15-year incumbent independent Wieden+Kennedy. Anomaly won the Diet Coke account from Droga5 and Minute Maid from Doner in prior years, and is now adding Coca-Cola's Classic Coke brand to its scope.
- Social app **TikTok** shifted its global media agency assignment from PHD to Zenith, only one year after PHD won the business, citing potential long-term conflicts with other brands (Twitter and YouTube) and privacy policy concerns.
- Health and Home business firm **Helen of Troy** selected a trio of Havas agencies for a more integrated approach. Existing partner Arnold will handle creative, Havas Media will handle media, and Red Havas will handle PR, replacing various incumbents—Blue Chip, 360PR, and Spark Foundry.
- Online learning institution **University of Phoenix** selected Connecticut-based independent media agency Mediassociates without a review to handle its national broadcast advertising account, replacing incumbent Omnicom's OMD.
- Newly launched short-form mobile video service **Quibi** hired IPG-owned Universal McCann to handle its media account, replacing incumbent independent Wieden+Kennedy, which was hired last year.
- **Kraft Heinz** retained Publicis Groupe, led by longtime (20 years) agency partner Starcom, to handle its global media planning and buying business—including data/analytics and commerce in the US under the name "Publicis 57." The review was initiated as a result of their contract expiring this year.
- Restaurant company **Inspire Brands** (Arby's, Sonic, Buffalo Wild Wings, and Jimmy John's) kicked off a review of its national media business. Incumbent agencies are participating —Zenith (Arby's and Sonic), Mindshare (Buffalo Wild Wings), and Haworth (Jimmy John's).
- Consumer goods giant **Reckitt Benckiser (RB)** retained Publicis Media's Zenith, following a review of its media planning and buying in the US for its brand portfolio (Durex, Mucinex, Scholl, Strepsils, Cillit Bang, Clearasil, Dettol, Harpic, Lysol, Mortein, Veet, Air Wick, Calgon, Vanish, and Woolite). Omnicom's Hearts and Sciences secured the client's nutrition business, previously serviced by Zenith.
- The **United States Census Bureau** selected LA-based integrated cross-cultural marketing and media agency Sensis, along with partner Deloitte Consulting, to provide enterprise-level social media and digital marketing support.
- Graphic design platform **Canva** selected Omnicom Media Group's OMD as its first US media AOR, following a review. The agency will handle all traditional and digital media planning and buying. There was no incumbent agency. OMD was Adweek's 2019 Global Media Agency of the Year.
- Foster City, CA-based pharmaceutical giant **Gilead Sciences** consolidated its media planning and buying activities with IPG-owned Initiative. The brand previously worked with Publicis Health Media, which has handled its media account for a decade but now handles only advertising and marketing-related services. The brand also worked with Horizon Media.
- Software giant **SAP** selected Omnicom Media Group as its Global Media Planning and Buying AOR, replacing sibling Omnicom Media Group's PHD. The agency will handle the work through a North Star unit consisting of talent from across multiple media agencies, leveraging global resources while maintaining local specificity and collaborating with SAP's creative AOR, Omnicom's BBDO. Key factors included: the agency's revitalized operational model, talent from across the network, strength of its data and analytics platform Omni, and global scale and reach.
- CRM giant **Salesforce** selected Interpublics Mediabrands' Initiative as its new media planning and buying AOR, following a review, replacing incumbent since 2013 independent Mediasmith.
- Pharma giant **GSK** formed a global partnership with Publicis Production and Tag to create an end-to-end global capability, consolidating production (previously handled by individual agencies) under one centrally governed service layer, creating better and faster assets, integrated with media. The brand will also build on-site studios and regional hubs responsible for adapting global content with the global center based in India.
- Financial services giant **Visa** kicked off a review of its $200M global creative account. Incumbents BBDO and Saatchi & Saatchi will defend. Omnicom-owned BBDO managed the global creative business for Visa since 2012. Publicis-owned Saatchi & Saatchi managed the creative business in Europe. Publicis Groupe's Starcom will continue to handle media buying and planning.
- French pharmaceutical giant **Sanofi** kicked off a review of its global media business. Incumbent media agencies WPP GroupM's Mindshare (global) and Havas Media (North America) will defend. Before Mindshare won the account in 2017, it was handled by Publicis-owned Zenith. The brand also worked with Hakuhodo in Japan and KWG for the consumer health business.

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Agency Roster Summary

Client	Incumbent	Change/Scope	Focus Area	New Agency	Review?
Canva		Media	US	OMD	Y
Coca-Cola	Wieden + Kennedy	Creative	US	Anomaly	N
Cox Automotive	Assembly, 360i	Media	US	Hearts & Science	Y
Gilead Sciences	Publicis Health Media, Horizon Media	Media	US	Initiative	N
GSK		Production	Global	Publicis Production, Tag	N
Helen of Troy	Blue Chip	Creative	Global	Arnold	N
Helen of Troy	360PR	Media	Global	Havas Media	N
Helen of Troy	Spark Foundry	PR	Global	Red Havas	N
Inspire Brands	Zenith, Mindshare, Haworth	Media	Global		Y
Pacific Foods		Creative	Global	72andSunny	Y
Quibi	Wieden + Kennedy	Media	Global	Universal McCann	N
Reckitt Benckiser (RB)	Zenith	Nutrition	US	Hearts & Science	Y
Salesforce	Mediasmith	Media	Global	Initiative	Y
Sanofi	Mindshare	Media	Global		Y
Sanofi	Havas Media	Media	US		Y
SAP	PHD	Media	Global	Omnicom Media Group	N
TikTok	PHD	Media	Global	Zenith	N
United States Census Bureau		Media	US	Sensis	N
United States Census Bureau		Digital	US	Deloitte Consulting	N
University of Phoenix	OMD	Advertising	US	Mediassociates	N
Visa	BBDO, Saatchi & Saatchi	Creative	Global		Y

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