

# Industry Update

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

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## In this issue:

TALENT



### Securing the right talent and resources

The global lockdown has, without a doubt, given people plenty of time to reflect and perhaps more importantly to reprioritize. New behaviors and... [continued on pg. 2](#)

WORK



### Producing great work and outcomes

The month of February is often consumed by conversations about Super Bowl ads, from the anticipation, buildup and rumors for upcoming spots to the actual... [continued on pg. 5](#)

FINANCIALS



### Driving efficient use of resources

Expect the unexpected. The year 2020 will go down in history as we measure the spiral financial effect experienced across the ad landscape. As we look... [continued on pg. 7](#)

PERFORMANCE



### Driving stronger performance and value

Performance should be measured in objective terms. The Super Bowl event prompted many creative directors, experts, and trade pubs to vote for their favorite... [continued on pg. 9](#)

AGENCY



### Agency reviews and roster changes

Brewer brand **Anheuser-Busch InBev** selected Publicis Groupe's Epsilon as its global data AOR, following a review. The agency will focus on... [continued on pg. 11](#)

ARTICLE



### APR's Tips on 'Green Up' Production

As part of a coalition of dedicated advertisers and organizations, we are united together to push for Ad Net Zero—a UK initiative designed to drive the... [continued on pg. 6](#)

### EXECUTIVE SUMMARY: Monthly recap

Are you tired of hearing about this “new normal”? I think we all are. Normal is not too exciting and it sets the bar quite low. Perhaps we crave a “new extraordinary”? It's fair to say that life as we knew it has been overturned by this nasty global pandemic. It did however lay strong and healthy foundations for an entirely new way of life and working that will shape the years ahead, and hopefully inspire us to be better at what we do, why we do it, and how we do it. Of course, as part of the new normal, we will still be talking about the Super Bowl ads that touched our hearts and who won the Super Bowl advertising game, a cookie-less world and first-party data, or how the technology-centric companies like Amazon, Google, and Facebook are managing to capture the majority of ad budgets as the world tilts toward ecommerce and optimized digital.

The client/agency dynamic is central to that equilibrium. The future of the agency model is without a doubt a more fluid, flexible, and fully integrated approach to marketing, and simply to working together. Just take a look at the new capabilities agencies are rapidly building, new partnerships that are being developed, or recent M&A deals. Agencies, clients, and the overall ad industry continue to face a stunning pace of change in 2021. The new extraordinary is upon us.



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

**TALENT: Securing the right talent and resources**

The global lockdown has, without a doubt, given people plenty of time to reflect and perhaps more importantly to reprioritize. New behaviors and preferences are emerging. Freelance marketplaces are becoming more popular as our workforce is now virtual. Business travel will resume, but at what pace and to what extent? The creative nature of talent is in its ability to morph and adapt to new realities. Look at the continued momentum for a more diverse and inclusive industry. Or Edelman's Disinformation Shield, a new offering designed to fight false narratives. Or Publicis Groupe launching "Le Truc" in an attempt to capitalize on its vast network to prompt better access to creative talent.

- **Business travel** in advertising is not likely to resume until next year. Per the ANA, 50% of its members (advertisers) either don't know when they will attend, or do not plan to travel or attend, in-person industry events until 2022.
- Signaling a strong desire to build AI capabilities or leverage existing ones, the Interpublic agency **Reprise** hired a chief AI officer (Dr. Vincent Spruyt) as part of a global strategy to incorporate AI into its tools and automate processes.
- **Dentsu International** reported an A- in CDP's global climate change report, aiming at 100% renewable energy and a plan to reduce absolute emissions by 46% to achieve their Net Zero commitment by 2030 across 145 countries.
- **VCCP** joined the Conscious Advertising Network (CAN), a voluntary coalition of over 70 organizations set up to ensure that industry ethics catch up with the technology of modern advertising.
- Per Tracy Allery, marketing business partner, NUSA Procurement—Nestlé USA in "**New Approaches to Evaluating Procurement**":
  - 1) Behave as a strategic brand business partner
  - 2) Focus on both top and bottom lines and recognize that value is greater than just cost
  - 3) Identify gaps and invest in learning and development
  - 4) Adapt processes to use right/fair selection criteria
  - 5) Choose agency collaboration over creating artificial marketplace tension
  - 6) Champion diverse, responsible, and sustainable relationships
  - 7) Strive for commercial terms that enable a viable ecosystem for all parties involved, including agencies
  - 8) Be authentic and honest with external partners
  - 9) Be transparent with confidentiality; respect and treat partners fairly
  - 10) Focus on issue resolution before pitching a solution
- **Fiverr** joined forces with brands, agencies, the CMO Advisory Board, and the Creative Council to develop a new matchmaking platform to help the marketing community connect with and manage teams of freelance workers.
- Per Business Insider, entertainment conglomerate **WarnerMedia** reduced its roster of agencies around the world from 3,000 to a few dozen over time (excluding media-buying agencies).
- **Forrester** estimated that the ad industry will lose 52,000 additional jobs through 2021 as a result of the health crisis. In 2020, Omnicom Group reported a 6,000-headcount reduction (or 8.5%), dentsu reported the same (or 12.5%) as part of its restructuring, IPG reported a 1,520-headcount reduction. Others—WPP and Publicis—have not yet reported their reductions.
- Seven-year-old experiential agency **NA Collective** which had large live activations clients like Nike, Tinder, and Facebook had to close doors, another victim of the pandemic. Live events and experiential work dried up during COVID-19.
- **TikTok** and **WPP** announced a new partnership giving WPP clients access to internal tools and leveraging marketing API integrations and next-generation formats such as augmented reality offerings. WPP is now Lead Agency Development Partner for TikTok's creator-focused APIs.
- Per Magid Souhami, president at Global Data Bank and Paul Williams, VP commercial and procurement at Havas Group, key advice for **marketing procurement** includes:
  - 1) Your agency is as good as your internal team allows it to be
  - 2) Agencies require a more subtle/advanced type of relationship management
- Media investment firm **GroupM** launched a so-called Data Ethics Compass, created in partnership with Unilever, based on "proprietary scoring logic" to evaluate ethical risk levels based on a wealth of contextual information.
- Per TrinityP3 UK, **benefits of global network agencies include**: Global talent pool, 24-hour working day, parent company pressure to improve, a global view on the brief, diverse culture, global consistency, cost-effective delivery solutions, data and insights, breadth of offer, broad experience, global negotiating power, and management focus on existing clients. **Benefits of local agencies**: flexibility, adaptability, affordability, no complacency, only the services you want, minimal bureaucracy, transparency, a local center of excellence, management stability, no hidden network fees, and focus on results.
- Per eg+ Worldwide, **predictions for 2021** include:
  - 1) New model agencies win the day
  - 2) Talent without borders
  - 3) Content ever more agile and data driven
  - 4) Channels won't sit still
  - 5) Three A's: Automation, AI, and AR
  - 6) Borderless world
  - 7) Earned relationships

## New agency or capabilities, restructuring and reorganizations:

- **Edelman** launched Edelman Studios content creation hub composed of three divisions—BlueRoom Studios (earned-first content), Edelman Productions (global network of studios and production operations) and EdelmanBRUT (short-form content) to compete with agencies for digital content. The firm partnered with content optimization platform VidMob and French digital media firm Brut.
- **MDC Partners Inc.** launched the MDC Global Affiliates program, entering into agreements with several new agency partners such as Brand New Galaxy, Beyond Media Global, and OKC.Media, prioritizing key technologies related to eCommerce, automation, data-driven content, insight, and digital.
- A new Los Angeles-based commercial, film, and TV production company composed of top filmmakers, **Logan Industry**, launched with clients including Apple, Nike, Tumi, Vogue, Coca-Cola, Samsung, Ford, Microsoft, and Disney.
- **Publicis Groupe** New York launched a creative collective called “Le Truc,” a network that builds on the company’s Power of One unification that brings together 600 creatives from across Publicis’ New York offices and other agencies like Digitas, Razorfish, Rokkan, Saatchi & Saatchi, and Publicis Media in one location. Based on flexibility and collaboration, Publicis will build bespoke Le Truc teams for clients assembling Groupe staffers and freelance talent together.
- **Edelman** launched Disinformation Shield, a global service (composed of corporate reputation and crisis specialists, predictive intelligence experts, behavioral scientists, and psychometric analysts) designed to help private-sector organizations combat false narratives with transparency and fact-based communications campaigns.
- New freelance media talent hub, **Liberty Hive**, launched an online membership platform (for posting jobs and short-term projects) in order to match proven media talent with agencies, media owners, and marketers.
- **Havas Media Group** reorganized the company’s existing UK entertainment and culture agency brands (Target Entertainment, Target Media, Target Live, Superhero, and Azure) under the new Havas Entertainment umbrella.
- Denver-based agency network **Worldwide Partners** expanded its global consortium by adding new agencies such as Dallas-based Moroch, European-based Interweave, and UK-based Lawton Communications Group.
- A new boutique branding shop, **Baker & Bonner Creative Emporium**, launched by Richard Group veterans, offers branding, design, strategy, consulting, identity, content, social, experiential, website design, and PR.

## Diversity and inclusion:

- The **Out of Home Advertising Association of America (OAAA)** joined forces with non-profit Geopath to launch an equality initiative, OOH UNITED, and promote a culture of inclusion within the out-of-home industry.
- Black-owned **Elite Media** released two films that recognize Black Humanity as a legacy worth protecting to mark February’s **Black History Month (BHM)**. The work is shared via a partnership with American Family Insurance.
- Many agencies like Chemistry, Butler, Shine, Stern & Partners (BSSP), Burrell Communications Group, and RAPP **honored the Black community** with special initiatives and celebrations coinciding with BHM.
- **MullenLowe US** launched The Black Catalog ([www.the-black-catalog.com](http://www.the-black-catalog.com)), created by Black@MullenLoweGroup, a collective community of Black employees across MullenLowe and Mediahub offices to help foster #blackwellness and promote Black Owned Wellness Brands.
- Per the Association of **National Advertisers’ Alliance for Inclusive & Multicultural Marketing**, Super Bowl advertisers fell short in terms of cultural relevance and inclusivity: Black actors were given roles in 29% of ads, Hispanics were represented in 12%, and LGBTQ and people with disabilities were represented in just 1% of campaigns.
- A group of 10 independent creative agencies supported an immersive, paid internship program called “**BLAC: Building Leaders and Creators**,” an eight-week initiative sponsored by Procter & Gamble, that gives up-and-coming Black creatives exposure with hands-on advertising experience.

## Noteworthy quotes:

- » “The real competition for us is not the holding companies. The real competition for us is Accenture. Our target is Accenture.”—Sir Martin Sorrell, Executive Chairman, **S4 Capital**
- » “Everything should be in service of delivering a business result and understanding the context of what’s most critical to brands and CMOs. Clients want someone who can connect the dots.”—Paul Woolmington, CEO, **Canvas Worldwide**
- » “Every link in the creative and media supply chain should be 40% multicultural, equal to the US population, and we have a long way to go.”—Marc Pritchard, Chief Brand Officer, **P&G**
- » “If I don’t use my position to change the face of the industry, shame on me.”—Wendy Clark, CEO, **dentsu International**
- » “Virtual agencies with little to no overhead and agencies with distributed talent will serve a body blow to those who cling to old models.”—Damisi Rosemond, Head of Content Studio, **eg+ Worldwide**
- » “We’re building a strategic, tech-centric and scalable global model for ambitious marketers, not the duplicative brick-and-mortar infrastructures typical of the traditional players.”—Mark Penn, Chairman and CEO, **MDC Partners**

- » “Unless we see the opportunity to upskill, we’re not holding huge agency reviews, but we are constantly reviewing the agencies. I think the days where the agencies had an agency of record model—an “until I fail” kind of model—are gone.”  
—Ivan Pollard, SVP Global CMO, **General Mills**
- » “‘Improved creativity’ is certainly more exciting to talk about than ‘improved business practices,’ but this should not mislead senior agency executives. Agencies need to get smarter about their business practices.”—Michael Farmer, Executive Chairman, **Farmer & Company LLC**
- » “Technology has made media a key driver of marketing. Creative is reliant on media for form, visibility and engagement. Marketers recognize the shift and are looking for partners who can lead.”  
—Greg Paull, **Co-founder and Principal, R3**
- » “You have to make it simple—as simple as possible for that core team—to pull in the right specialists and the right resource when they need it, so that it’s not there when they don’t.”—Xavier Rees, CEO, **Havas CX UK**
- » “Typically, the average tenure of the chief marketer has been between three and four years. We currently have a high percentage of CMOs who have spent more than three years at their current companies. The marketplace is ripe for churn.”—Raja Rajamannar, CMO, **Mastercard**
- » “The importance of efficiency through automated ways of working, including account service, will continue to grow.”—Erica Amestoy, Group Director, Marketing Communications, **eg+ Worldwide**
- » “If setting up an in-house agency is driven by a desire to reduce costs, this will need to be achieved by recruiting lower-cost resources and therefore it is fair to assume less capable or experienced resources with lower market costs.”—Darren Woolley, Founder and CEO, **TrinityP3**
- » “It is hard to know who is from procurement and who isn’t. This is how it feels at GSK, where procurement is embedded in terms from top to bottom as a trusted business partners helping drive our growth agenda.”—Tamara Rogers, Global CMO, **GSK**
- » “Brands continue to shift from agencies that are not ready for the future, and so they should.”  
—Mat Mildenhall, Chief Client Officer, **eg+ Worldwide**

#### Company profiles:

- **Metric Theory (<https://metrictheory.com>)** is a Performance Digital Marketing agency that is a part of MightyHive (S4 Capital). Core services include search engine marketing, paid social, display and remarketing, shopping ads, product feed management, and digital video. Among other awards, the firm was named 2019 SEM Agency of the Year. They worked with over 400 international brands. Clients include Lyft, GoFundMe, and Winc, among others.
- **Instrument ([www.instrument.com](http://www.instrument.com))** is digital brand and experience innovation company in Portland, Oregon, owned by MDC Partners. The agency uses “the power of design and technology to solve complex problems and transform business.” Core services include brand, strategy, and consulting, digital experience, engineering, marketing, design, development, and content creation provided by 175+ creative technologists. Clients include Levi’s, Pinterest Business, Sonos, Nike, and Google.
- **WorkInProgress or WIP ([www.wipbdr.com](http://www.wipbdr.com))** is a full-service innovation and advertising agency—part ad agency, part innovation shop—located in Boulder CO. The agency believes, “We are all a work in progress.” Awards include 2020 Small Agency of the Year 11-75 employees (Silver) and Campaign of the Year Integrated (Silver). Clients include Nescafe, KitKat, TruTV, and Jimmy John’s.

Check out our whitepaper and best practices guide on “**Benchmarking: How to get the most value from it**”: what should advertisers know about agency cost benchmarking and what you can do to get the most value from this type of resource.



**WORK: Producing great work and outcomes**

The month of February is often consumed by conversations about Super Bowl ads, from the anticipation, buildup and rumors for upcoming spots to the actual event, but also the post-reviews and discussions about who won the advertising Super Bowl game. How do we achieve relevancy in a time of uncertainty? This year, nostalgia (with a “Wayne’s World” spot from Special Group for Uber Eats) and inspiring, personal, human connections (with Toyota’s ad from Saatchi & Saatchi featuring the story of Paralympian gold medalist Jessica Long) were the main themes. A couple of spots were done in-house: Logitech, “Defy Logic” and Bass Pro Shops and Cabela’s. Everyone has an opinion on which spots were most enjoyable to watch or effective at reaching their audience. Some of my favorite ones where: Rocket Mortgage (Quicken Loans), “Certain Is Better” by Highdive; Amazon, “Alexa’s Body” by Lucky Generals; and Toyota, “Upstream” by Saatchi & Saatchi. Which were your favorites?

- **What Should CMOs Focus on in 2021?** Per Futurum Research + Analysis, CMOs should:
  - 1) Do more with less
  - 2) Be creative (and techy and business savvy)
  - 3) Focus on retention and CX
  - 4) Educate the enterprise
- **Advertising Production Resources (APR)** released a paper called “Make Once, Reuse Often” to provide relevant guidance and tips on how to execute an integrated production in one market.
- **2021 technology industry outlook** per Deloitte and three key strategic opportunities
  - 1) Redoubling digital transformation efforts
  - 2) Reorienting and reskilling the workforce
  - 3) Reexamining where and how manufacturing happens
  - 4) Looking boldly to the future
- Per Iterable, 91% of brands plan to stay focused on the **trust-building strategies** they developed last year based on the pandemic and the social unrest. Key focus: trust building, crisis-driven communications, and empathetic marketing.
- Per Advertising Production Resources (APR), the benefits of moving to **one global production agency/network**:
  - 1) Cost efficiency: A global rate card with transparency of production and post-production spend
  - 2) A dedicated team immersed in the world of the client and their brands
  - 3) An in-house team who can cover a range of specialist TV admin services (as required), rather than local markets trying to manage
- A student (Ashley Xu) produced a high-quality **Sprite ad** in her college dorm room that went viral on the video-sharing app TikTok, scoring 16.6 million views and 4.5 million likes, showing the possibilities of low-cost production ideas.
- **Mastercard** automated its production data collection, spending, and reporting via AI technology, working with content production consultancy PostAds Group and cloud-based platform Prodigy. The solution replaces the legacy email communication bidding practices with suppliers and eliminates the manual quarterly process of aggregating global production data from disparate sources from 40+ countries.
- Per the ANA, **Mastercard’s** goals to improve its production data aggregation process were to:
  - 1) Leverage existing agency-supplier email communication and not force a change in this critical part of the process
  - 2) Centralize all production spend data on a cloud-based tool
  - 3) Centralize all data entry and maintain 100 percent data integrity
  - 4) Report on production spending in real-time for actionable business intel, strategy, and cost savings
- **Twitter** identified six macro conversation themes after organizing and analyzing billions of Tweets over a period of two years: well-being, creator culture, everyday wonder, one planet, tech life, and my identity.
- Jeans and apparel retailer **American Eagle Outfitters** launched a new augmented reality shopping guide on Snapchat, targeting Gen Z With ‘Outer Banks’ Stars and Snapchat to launch its new spring campaign.
- **MDC Partners agencies** created seven Super Bowl LV spots:
  - 1) Jeep | Doner
  - 2) NFL | 72andSunny
  - 3) Jimmy John’s | Anomaly
  - 4) Indeed.com | 72andSunny
  - 5) Vroom | Anomaly
  - 6) Oatly | Forsman & Bodenfors
  - 7) NFL | 72andSunny
- Agencies increasingly set up **virtual war rooms** (using virtual workspace and virtual conferencing tools) around real-time social media campaigns for major events like the Super Bowl.
- Per Farmer & Company LLC, agency two-person creative teams have seen their yearly outputs increase from 25 **briefs** per year to over 500 per year during the past decade (including FB posts, Instagram ads, deliverables, etc.).
- **P&G** launched an internal program dubbed Growth Works a while ago, assigning a team of in-house development experts to partner with brand marketing leads to promote lean innovation, resulting in a few innovative concepts (from a current list of 180 projects): Oral-B iO electric toothbrush and smart baby monitor system Lumi by Pampers.
- **Comscore** agreed to provide privacy-safe e-commerce and audience behavioral data through Comscore’s Activation suite to Omni, the marketing operating system that supports Omnicom’s global network of agencies, the first time an agency holding company has had access to this data set.

**Noteworthy quotes:**

- » “It’s awesome to see that the creative process is no longer limited. As much as larger productions have fantastic benefits for brands, we don’t always need a traditional channel to express our creativity, thoughts, ideas or beliefs.”—Leslie Collin, Senior Planner Strategy and Insights, **VMLY&R**
- » “The change in business environment precipitated by COVID-19 has accelerated the need for brands to future fit their organizations. Naturally this includes a keen focus on e-commerce, customer experience, data, and technology.”—Stephan Loerke, CEO, **WFA**
- » “The environment has changed. It is 24/7, always-on. The days of briefing an agency and letting them get on with it for two or three weeks, and then rebriefing them [at a later date], those things have gone. You don’t have the time anymore.”—Sir Martin Sorrell, Executive Chairman, **S4 Capital**
- » “Clients don’t and shouldn’t have to care about agency disciplines.”—Colm Murphy, Chief Strategy Officer, **The&Partnership**
- » “The death of the third-party cookie will be front and center in 2021. Brands will need to heed two key consequences. One is a need to better prepare for the use of first party data and using their own channels to reach customers. The other is a shift to more contextual marketing, which continues to improve with AI.”—Meredith Ebel, Director of Strategy, **The Designory/eg+ Worldwide**
- » “Creativity lies as much in the making as in the concept. It’s a good time to be more experimental, as brands want to produce their content faster and cheaper.”—Guillaume Martin, Head of Strategy, **BETC Paris**
- » “AI will be the single biggest disruptor for marketing, or the single biggest anything for marketing.”—Raja Rajamannar, CMO, **Mastercard**
- » “There’s lots of advertising out there, but just like technology it can be used for good or bad. It can benefit the consumer or it can be annoying. We need examples of ingenuity that positively impact the customer, that make people feel good about what they see—compelling, trust-building advertising.”—Amir Malik, Managing Director of Growth Marketing, **Accenture Interactive**
- » “We’re sometimes guilty of being formulaic—it’s a cliché, but to win you must think outside the box.”—Christian Juhl, Group CEO, **GroupM**
- » “If you’re a force for good without growth, you’re philanthropy. And we’re not philanthropy. If you’re a force for growth without good, you’re a mercenary. We’re not that either. So it has to tie together.”—Marc Pritchard, Chief Brand Officer, **P&G**
- » “We increasingly see Apple as one of our biggest competitors.”—Mark Zuckerberg, CEO, **Facebook**

**ARTICLE: Tips on ‘Green Up’ Production** Contributed by: Advertising Production Resources**Celebrating the Supporters of Ad Net Zero**

As part of a coalition of dedicated advertisers and organizations, we are united together to push for Ad Net Zero—a UK initiative designed to drive the advertising industry’s carbon emissions down to “net zero” by 2030.

[Read more](#)

**Sustainability in Advertising Production: Actions Today for a Habitable Tomorrow**

Are you looking to implement more sustainable production practices, but aren’t quite sure where to begin? This article summarizes actions you can take today to reduce your carbon footprint in your advertising productions.

[Read more](#)



**FINANCIALS: Driving efficient use of resources**

Expect the unexpected. The year 2020 will go down in history as we measure the spiral financial effect experienced across the ad landscape. As we look forward, we wonder how quickly world economies will recover. And what are the implications for advertising. Look at the earnings of major holding companies in Q4 and for full year 2020: significant decline in revenue as organic growth has weakened that ecosystem. Yet everyone is expecting a rebound this year. Major media companies expect an increase in ad spend exceeding 7% worldwide. Positivity is a new currency.

- Consensus outlook across major media firms (dentsu, GroupM, Magna, Zenith) shows a drop of **advertising spend** of 4.4% in 2020 but a projected 2021 increase of 4.3% in the US, and shows a drop of 6.2% in 2020 worldwide with a projected 2021 increase of 7.3%.
- Per Kantar, **Super Bowl advertising** revenue hit record levels—with \$545M in-game ad-spending (a 21% increase YOY) from 96 commercial spots and a record 57 minutes in total. The automotive ad category was the top spender with \$75M (14% of the total), followed by Premium TV and video streaming services and alcoholic beverage.
- Privately held company **Stagwell** recognized material weaknesses in Stagwell's internal control over financial reporting, and acknowledged working on fixing them as it approaches its merger with MDC Partners .
- Per CMO Council, 65% of CMOs aim to boost **tech and automation spending/investments** through 2021. 70% turn to automation to improve efficiency.
- Per Socialbakers, **2020 digital advertising** spend increased by 58.2% worldwide YOY, despite COVID-19 and thanks to a strong holiday season. 73.7% of total ad spend went to the main feeds on Facebook and Instagram in Q4.
- Per R3, **ad agency new business** revenue dropped 5.8% in 2020 (12% drop in creative and increase of 7% in media). WPP led the pack with new business revenue of \$607M, followed by Publicis Groupe (\$345M), Interpublic (\$320M), Omnicom (\$292M), dentsu (\$239M), Havas (\$154M), Accenture (\$97M), and MDC Partners (\$23.4M).
- Per GroupM, 10 **technology-centric companies** (Amazon, Alphabet, Booking, Expedia, Netflix, Facebook, Uber, eBay, Wish, and Airbnb) collectively spent around \$35 billion on advertising activities in 2019, accounting for 7% of ad spending. However, spending by this group fell by around 20% in 2020 (after a growth of 17% the year prior).
- Creative management platform **Ad-Lib.io** closed a \$12M Series A funding round in an effort to expand its US business.

**Mergers and acquisitions (M&A) activity:**

- Per Ciesco, **M&A deals in the technology, digital, media, and marketing sectors** in 2020 accounted for a total of 1,091 transactions, a 19% decline YOY, for a deal value of \$55.9B, a 50% reduction YOY. The number of deals with values above \$1B dropped to 13 in 2020 (vs. 28 the year prior). The US and UK were the most active. Privacy equity firms dominated the space (37% of all activity). Most active buyer by deal volume: Accenture.
- Freelance platform **Fiverr** acquired Working Not Working to expand its service offerings to paid job opportunities for its members and to build a community of high-quality creatives.
- **Publicis** acquired B2B specialist and UK-based agency Octopus Group to boost its B2B capabilities, alongside Saatchi & Saatchi, Leo Burnett, and Digitas. Clients include Adobe, Siemens, Logitech, and Smartsheet.
- Media monitoring and media contact database services **Cision** acquired online consumer intelligence and social media listening platform Brandwatch for \$450M, creating a PR, marketing, and social listening giant.
- **Centro** acquired predictive advertising technology for digital media channels QuanticMind to offer a single platform to automate across all types of paid digital advertising. QuanticMind's platform relies on artificial intelligence (AI) and machine learning which it uses for search advertising management and marketing intelligence visualization.
- **WPP** acquired Brazilian digital innovation and software engineering company DTI Digital (DTI) to expand its presence in areas such as experience, commerce, and technology. Clients includes FCA, Gerdau, Serasa Experian, Hermes Pardini, Pottential, and Bayer.
- Sell-side advertising platform **Magnite** acquired sell-side ad platform SpotX from the RTL Group for \$1.17 billion, creating the largest independent connected TV/video advertising sell-side platform for the programmatic space.
- **Roku** acquired Nielsen's Advanced Video Advertising (AVA) business. Meanwhile, Roku, Inc., and Nielsen announced a strategic alliance to shape the future of media measurement and TV advertising in a streaming-first market.
- Independent trading desk **AUDIENCEx** acquired digital marketing agency Bigbuzz Marketing Group to expand its services chops and content capabilities.

**Social media and holding companies' financial results:**

- While experiencing double digit revenue growth, **advertising spend** in 2020 went down for Amazon (\$10.9B), Alphabet-Google (\$5.4B), and Netflix (\$1.4B), or -1%, -21%, -23%, respectively. Facebook increased ad spending (from \$1.6B to \$2.3B) for the same period, or a 44% increase.
- **dentsu Group** recorded a COVID-19-related \$1.37 billion impairment charge for full-year 2020 leading to an operating loss for the year of \$1.3 billion. Revenues for the year fell 10.4% to an estimated \$8.9 billion with an organic revenue slide of 11.1%.
- **Omnicom Group** reported a 9.3% revenue drop to \$3.8 billion and an organic revenue drop of 9.6% in Q4 2020. For the full year, revenues dropped 11.9% to \$13.2 billion with organic revenue down 11.1%. While advertising (creative/ media) was down 12%. Healthcare was the best category performer (3.3% organic growth YOY).
- **Interpublic Group of Cos.** (IPG) reported a 6.1% revenue drop YOY (or \$2.28 billion) and a 5.4% drop in organic revenue in Q4 2020, mostly driven by a drop in international markets (10.5% compared to the US at minus 1.8%). For the full year, net revenue dropped 6.5% to \$8.06 billion while organic net revenue decreased 4.8%. E-commerce, connected commerce, media planning and investment, and health care were strong categories. The company reduced its headcount by 7.6% in 2020.
- **MDC Partners** reported a 14% drop in Q4 revenue (\$328 million) and a 15% decline for full-year 2020 revenue (\$1.2 billion). Q4 organic revenue declined by 13.7%, while the full-year decline was 13.9%. MDC is projecting organic growth of between 7% and 9% for 2021.

- Social media platform **Twitter's** advertising revenue exceeded \$1 billion in Q4, a 30% year-over-year increase, with operating income up 65% or \$252 million, despite costs rising over \$1 billion. For the full year, revenue was \$3.7 billion, or a 7% increase YOY. The firm plans to grow headcount by 20% in 2021.
- Similar to Google, **Facebook** announced it will invest \$1 billion in the news industry over the next three years (the firm has already invested \$600M since 2018), following the company's showdown with the government of Australia.

**Noteworthy quotes:**

- » "A note to all agencies, I have zero interest in cheaper, more effective, better return on investment, yes! But I don't do 'Cheaper.'"—Barry Byrne, Global Head of Marketing and Retail Procurement, Adidas
- » "The operative question for a client to ask of their agencies is, "How and when will our rates be adjusted to reflect the savings related to your remote work model?"—Cliff Campeau, Principal, **AARM**
- » "Net-net, when we come out of Covid-19 my prognosis is that marketing spending will go up across industries. Every company has pulled back. As an industry we pulled marketing dollars back by almost 30% last year. That's going to come roaring back."—Raja Rajamannar, CMO, **Mastercard**
- » "Advertisers that have reduced their budgets obviously need to collaborate with their agency partners on revised scopes of work and remuneration programs that reflect new spend levels."  
—Cliff Campeau, Principal, **AARM**

Check out our whitepaper and best practices guide on "**Building the Right Agency Management Team**":

What advertisers must consider in building the right competencies and resources to support marketing and agency partners.

**BEST PRACTICES GUIDE**

# Building the Right Agency Management Team



## PERFORMANCE: Driving stronger performance and value from the partnership



Performance should be measured in objective terms. The Super Bowl event prompted many creative directors, experts, and trade pubs to vote for their favorite ads, which is, of course, subjective but still insightful. Beyond that, not all advertisers will share the measurable success of their campaigns publicly. Yet, the ad industry focus remains on building new, more elaborate tracking and measurement capabilities to make performance highly effective. Innovation in AI, automation and programmatic, and the use of first-party data has fueled massive investments and M&A activity. Companies like Disney committed to automate over 50% of their ad network through their DRAX offering within five years. The race is on to build the scalable infrastructure needed for a more accountable advertising world.

- Per Ad Age and iSpot.tv, the **56 Super Bowl 2021** advertisers generated 6.31 billion TV impressions, 26 million earned online views, and they garnered 63.95 billion social impressions. Mountain Dew captured the largest “share of voice” (21.78%) followed by Amazon Echo (13.95%), and Jeep (10.64%).
- Per Ad Age, best (3+ stars) **Super Bowl LV commercials** were:
  - 1) M&M’s, “Come Together” by BBDO New York
  - 2) GM, “No Way, Norway” by McCann Worldgroup
  - 3) Doritos, “#FlatMatthew” by Goodby, Silverstein & Partners
  - 4) Dexcom, “Rant” by Marcus Thomas
  - 5) Indeed, “The Rising” by 72andSunny
  - 6) Bud Light, “Bud Light Legends”
  - 7) State Farm, “Drake from State Farm” by The Marketing Arm
  - 8) Mtn Dew, “Mtn Dew Major Melon Bottle Count” by TBWA/Chiat/Day New York
  - 9) Tide, “The Jason Alexander Hoodie” by Woven Collaborative
  - 10) Toyota, “Upstream” by Saatchi & Saatchi
  - 11) TurboTax, “Spreading Tax Expertise Across the Land” by Wieden+Kennedy
  - 12) Rocket Mortgage (Quicken Loans), “Certain Is Better” by Highdive
  - 13) T-Mobile, “Rockstar 5G” by Panay Films
  - 14) Huggies, “Welcome to the World, Baby” by Droga5
  - 15) Cheetos, “It Wasn’t Me” by Goodby, Silverstein, & Partners
  - 16) Verizon, “Can’t Blame the Lag” by McCann
  - 17) Amazon, “Alexa’s Body” by Lucky Generals
  - 18) Cadillac, “Scissor Hands-Free” by Leo Burnett
  - 19) Jeep, “The Middle” by Doner
  - 20) Anheuser-Busch, “Let’s Grab a Beer” by Wieden+Kennedy.
- Noteworthy Super Bowl fact: two highly praised ad spots were created **in-house** this year. Logitech, “Defy Logic” and Bass Pro Shops and Cabela’s.
- Per USA Today’s Ad Meter, the two 60-second ads from Rocket Mortgage and agency Highdive were voted **the first and second best of the Super Bowl ads by consumers.**

- Gorilla Glue** sales jump as a result of an unsolicited social media windfall on TikTok, after Jessica Brown, nicknamed “Gorilla Glue girl,” captured the Internet’s attention with her “forever ponytail” after she used Gorilla Glue Spray.
- ANA published an **Agency Search and Selection Playbook**, composed of multiple components:
  - 1) Conducting an agency search during a crisis
  - 2) Selecting a new agency
  - 3) Organizing for an agency search
  - 4) Deciding when to conduct an agency search—all authored by JLB + Partners’ David Beals
- Per Resonate SVP Agency Sales Jonathan Ricard, the pillars of using **data to ignite growth** are:
  - 1) Expanding existing business
  - 2) Pitching new business
  - 3) Becoming a strategic business advisor
  - 4) Reducing silos with cross-team data adoption
- Per media and marketing consultant ID Comms, 38% of advertisers believe that **media buy** dictates the plan, while 40% believe the media plan dictates the buy. 86% now believe auditing is a critical component of good media stewardship.
- Fred & Farid** produced FRIDAYS FOR FUTURE/1%. A wake-up call for 99% of humans on earth. Results: 100 pieces of press coverage, 3M views, +30K social media shares, +367K video views, and +720% YouTube subscribers.
- Nielsen** launched Identity Sync, a cookie-free identity resolution solution that relies on first-party data for cross-platform campaign measurement.
- Disney** launched a programmatic exchange, DRAX, as part of its commitment to automate more than half of its business and make the majority of its inventory—both linear and digital—addressable within five years.

### Awards:

- Per the ANA, **Award Programs** advertisers should pay close attention to: B2 Awards, ANA International ECHO Awards, Multicultural Excellence Awards, REGGIE Awards, Email Experience Council (EEC) Awards, ANA Nonprofit Awards, B2B Hall of Fame, ANA Genius Awards, and ANA Rising Marketing Stars.
- Best of Tweets 2020** included Gatorade as best campaign for quenching our thirst for sports, Uber as best campaign for driving positive change, Ben & Jerry’s for best brand speaking out and standing up, DreamWorks Trolls for best campaign for connecting us from the couch, Verizon for best campaign for redefining home entertainment, HBO Westworld for best campaign from the future, Airbnb for best campaign for making us nostalgic, Chase for best campaign for making missing out memorable.
- YMLY&R Poland** bought Poland’s most popular porn magazine, teaming up with Gazeta.Pl, Mastercard, and BNP Paribas, and won multiple Lions by creating the last-ever issue and shutting it down, making it the first-ever porn magazine that challenged sexism and misogyny.

- Amazon's Super Bowl spot "Alexa's Body," created by agency Lucky Generals won the **2021 Super Clio**, followed by Bud Light Seltzer Lemonade's "Last Year's Lemons" spot by Wieden+Kennedy New York. Other brands considered: Anheuser-Busch, DoorDash, General Motors, Huggies, Jimmy John's, Rocket Mortgage, and Toyota.

• **2020 Creative Media Award winners:**

- 1) Best in Show: The Punishing Signal by Lodestar UM & FCB India for Mumbai Police
- 2) Member's Choice: Porsche x Star Wars: The Designer Alliance by Cramer-Krasselt for Porsche
- 3) Brand/Product Placement: Driving Record Ratings By Colliding Gamers And NASCAR Drivers by Mediahub for FOX Sports + NASCAR
- 4) Influencer Marketing: Unexpected DJs x Diplo vs. The World by Goodby Silverstein & Partners for NCSOFT & Harmonix
- 5) Film/Video: Proud Parent by 360i for OREO  
Business Media: Observability for All by Just Global for New Relic
- 6) Content Marketing: Going From Broke by Crackle Plus for Crackle Plus
- 7) Native Marketing: #InItTogether by J3 & Meredith for Johnson & Johnson/Johnson's Baby
- 8) Creative: I am Jimmy by MERGE for Dana-Farber Cancer Institute/The Jimmy Fund/MERGE
- 9) Media Plan: Super Bowl by Anheuser-Busch for Bud Light Seltzer
- 10) New/Emerging/Experimental Media: Cool Ranch Dance Off by Goodby Silverstein & Partners for Doritos
- 11) Multicultural/LGBT Media: More Than a Vote by Open Influence—Sadler Strategic Media—More Than a Vote for More Than A Vote
- 12) Social Media: More Than a Vote by Open Influence—Sadler Strategic Media—More Than a Vote for More Than A Vote
- 13) And more...

- **Kantar** announced an integration with cloud-based Google Ads Data Hub to enable the measurement of ad campaign performance on YouTube across all devices without the use of third-party cookies.

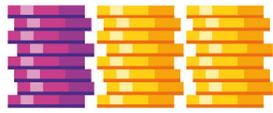
**Noteworthy quotes:**

- » "Legacy tactics or channels will become obsolete faster than ever, requiring marketers to constantly reinvent themselves."—Bruno Cardinali, CMO, North America, **Popeyes Louisiana Kitchen Inc. (RBI)**
- » "We will apply magic to the logic. There is too much illogical siloing without a Sherpa to decipher when to use data intelligently."—Paul Woolmington, CEO, **Canvas Worldwide**
- » "When a marketing team provides clear expectations for the work and high-quality feedback on the work, the creative team's effort improves."—Robin Boehler, Co-founder, **Mercer Island Group**
- » "We want to take money from ad agencies."—Richard Edelman, **President and CEO, Edelman**
- » "There's some brilliant stuff happening, there's lots of space to explore and there's always new territory that agencies could take us into. So long as we hold onto what our brands stand for and don't outsource that to the agencies to steward, it gives us a bit more agility to find good ideas wherever they come from."—Ivan Pollard, SVP Global CMO, **General Mills**
- » "Pay by deliverable" is an appropriate way forward, and it should become a strategic foundation for every client-agency relationship."—Michael Farmer, Executive Chairman, **Farmer & Company LLC**
- » "Marketing cannot succeed unless business leaders in companies—whether it's a CFO or CHRO or CTO or CEO—embrace marketing."—Raja Rajamannar, CMO, **Mastercard**
- » "Take risks—smart risks. This industry has always rewarded the bold. I'm the data and technology guy that wants to build a perfect, detailed plan, but at a certain point, you have to take a leap."—Christian Juhl, Group CEO, **GroupM**

Check out our whitepaper and best practices guide on "**SAP ARIBA + Agency Mania Solutions**": Find out how one of the leading SRM platform and Agency Mania Solutions' platform, especially a scope of work (SOW) tool like ScopeDeliver™ come together.



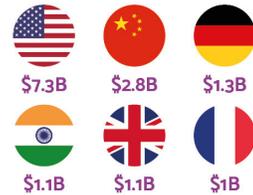
KEY FINDINGS AND INSIGHTS FROM CONVERGENCE  
FY 2020 MEDIA NEW BUSINESS BAROMETER STUDY



**\$22.2B**

REVIEWED GLOBALLY IN 2020

2/3 of the total volume concentrated in six countries



Agencies set up bespoke units to serve:

- Heineken (global),
- Henkel (Germany),
- Sanofi (global),
- Unilever (China)



Total volume reviewed **-18%** VS 2019

**T10P** PITCHES & MOVES



**FY 2020 NBB GLOBAL RANKINGS**

AGENCY NETWORKS



MEDIA AGENCY GROUPS



**MEDIA PITCHES & REVIEWS 2021**  
\$10B IN PLAY ALREADY

**T5P** CONCLUDED PITCHES in Jan/Feb (\$3.4B)



**T5P** ONGOING REVIEWS (>\$7B)



Multimarket

Global

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COMvergence worldwide

**AGENCY: Agency reviews and roster changes**

Courtesy of COMvergence. 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.

- Brewer brand **Anheuser-Busch InBev** selected Publicis Groupe's Epsilon as its global data AOR, following a review. The agency will focus on encouraging better use of data to execute and measure marketing campaigns.
- Jeans and apparel retailer **American Eagle Outfitters** selected VaynerMedia as its new media AOR, replacing two-year incumbent dentsu's digital agency 360i.
- **Avocados From Mexico** selected GSD&M as its AOR without a review, replacing three-year incumbent Energy BBDO. GSD&M previously worked with the brand and will handle creative and brand work.
- Non-profit organization **American Cancer Society** selected Knoxville-based independent agency Tombras as its media AOR, following a review led internally, replacing incumbent Publicis Media's Zenith. The agency will handle media buying and planning across broadcast, linear, digital, and social channels. The analytics-based approach to media was a key differentiating criterion.
- Skincare and beauty brand **Aesop** selected Havas CX (London office supported strategically and operationally in key markets) as its global customer engagement AOR, following a review.
- **Behr Paint** hired Omnicom's TBWA\Chiat\Day LA as its creative AOR, following a review. The agency will handle strategy, data and analytics, creative, digital/social, and production for the brand.
- Pizza chain **Donatos** hired Curiosity as their social media AOR, following a review, replacing incumbent Cincinnati-based Geben Communications. The agency will handle social media strategy and execution, as well as community management, across Facebook, Instagram, and Twitter.
- **Driven Brands** and its subsidiaries, Meineke Car Care Centers and Take 5 Oil Change, selected San Francisco-based agency Erich & Kallman (E&K) as its creative AOR without a review. One of the agencies has been doing project work for the brand in the past year. The agency will handle strategy, creative and production, TV, radio, OOH, social, digital, and media planning and buying for offline media.
- Foot-care brand **Dr. Scholl's** selected OMD USA as its new media AOR, replacing incumbent dentsu McGarrybowen, New York. It follows an earlier decision by the brand to move creative from dentsu McGarrybowen to independent agency Joan. The review only took weeks and was handled internally.
- Automaker **Honda** kicked off a review of its US media account, the so-called Tier 2 media business, which includes regional advertising, linked with individual dealer efforts for Honda and Acura brands, challenging Horizon Media and RPA, which handles Honda's national creative and media business, including some Tier 2 media work.
- **Inspire Brands** (Arby's, Baskin-Robbins, Buffalo Wild Wings, Dunkin', Jimmy John's, and Sonic Drive-In) selected Publicis Groupe as the restaurant group's media AOR. Publicis formed a dedicated unit called Inspire Media Engine, led by Publicis Groupe agencies Zenith and Digitas, and will handle national media planning and buying (and some local work as well). Paid search or social is out of scope, as they are managed either in-house or through other agencies.
- **Kraft Heinz Continental Europe** named We Are Social as its social media AOR. The agency will handle strategy and execute social-first pan-European social media activations.
- Toyota-owned brand **Lexus** ended its relationship with Publicis' Digitas in the UK for a new partnership under WPP agencies (and The&Partnership) to deliver CRM and greater operational efficiencies, combining teams working with its parent company Toyota.
- **Mike's Hard Lemonade** hired Boulder-based WorkInProgress (WIP) as its creative AOR, replacing incumbent Havas Chicago. The agency will handle campaign development and execution. The brand also hired Haworth Media as its new media AOR. The agencies will partner with MSL (PR) and Epsilon (shopper marketing).
- Biotechnology company **Moderna** selected Omnicom's TBWA\Chiat\Day LA as its creative AOR, after they had done some campaign work for the brand.
- **Proximo Spirits** selected Eleven as its new AOR on The Kraken Black Spiced Rum brand, without a review and following a two-week trial period.
- **Pernod Ricard USA** selected WPP's Ogilvy as its lead creative agency for its brands Olmeca Altos Tequila, Tequila Avión, and Del Maguey. The agency will handle brand strategy, advertising, and personalized content development.
- Textile upcycling company **Reborn Clothing Co.** selected North Carolina-based French/West/Vaughn (FWV), a top integrated agency, as its first AOR to support the brand's integrated marketing strategy development and execution.

- **Reckitt Benckiser (RB)** selected Publicis Groupe following a review, handling RB Health's Central European (Germany, Austria, Switzerland, Denmark, Sweden, Finland, Norway) media strategy, digital planning, and purchasing via Publicis Media, replacing incumbent Initiative Media for offline media. Publicis's Zenith was managing media planning and buying and data and analytics for the Health, Hygiene, Vitamins, and Supplements (VMS) divisions in the US.
- The Salesforce-owned workplace messaging app **Slack** selected IPG's Mediahub as its global media planning and buying AOR in the US and EMEA, following a review.
- **Samsung** selected Publicis Groupe as its US media AOR, retaining the account with its 'Power of One' team of agencies (with agencies including Starcom, Digitas, and Razorfish) and handling both traditional and digital.
- **Safelite AutoGlass** selected FCB as its creative AOR, following a review entirely managed via video conference, replacing incumbent Ron Foth Advertising. The agency will handle consumer campaigns and communication materials, including broadcast, online video, social media, and digital channels.
- Campari Group-owned spirits brand **Sky Vodka** selected MDC Partners' Mono to be its first global AOR following a review, replacing incumbent WPP's VMLY&R and a range of agencies.
- Retailer **Sam's Club** selected WPP's VMLY&R as its first AOR, following a review conducted entirely over Zoom. The brand worked for years on a project basis with creative shops that included The Via Agency, Strawberry Frog, and MDC Partners' Mono.
- **Schwan's Company** selected Omnicom's TBWA\Chiat\Day LA as its creative AOR to handle strategy, creative, digital/social and production across its pizza portfolio including Red Baron, Freschetta, and Tony's.
- **Stella Watch Company** selected Generator Media + Analytics (GM+A) as its media AOR. The agency had previously done some project work.
- **Terminix** hired Interpublic Group agencies The Martin Agency (TMA) and Mediahub as its new creative and media AOR (respectively), following a review. TMA will handle all things creative, including digital, and Mediahub will handle media planning and buying.
- **United Airlines** kicked off a review of its creative account at a time of crisis for the airline industry. Dentsu Mcgarrybowen is the incumbent since 2011.
- Retailer giant **Walmart** kicked off an internal review of its US media account (estimated at \$600 Million) and its four-year incumbent WPP affiliate Haworth (49% owned by WPP) is now near the end of their contract with the brand.
- **Zippo** named WPP's Ogilvy as its creative, PR, and social AOR, following a long-standing partnership. The agency will handle brand strategy, creative, media relations, influencer marketing, social strategy, and performance media.



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## Agency roster summary

CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?	COMPANY LOGO
Anheuser-Busch InBev	Unknown	Data AOR	Global	Epsilon	Yes	
American Eagle Outfitters	360i	Media AOR	Unknown	VaynerMedia	Unknown	
Avocados From Mexico	Energy BBDO	AOR	Unknown	GSD&M	No	
American Cancer Society	Zenith	Media AOR	Unknown	Tombras	Yes	
Aesop	None	Customer Engagement AOR	Global	Havas CX	Yes	
Behr Paint	Deutsch	Creative AOR	Unknown	TBWA\Chiat\Day LA	Yes	
Donatos	Geben Communications	Social Media AOR	US	Curiosity	Yes	
Driven Brands	Unknown	Creative AOR	Unknown	Erich & Kallman (E&K)	No	
Dr. Scholl's	Dentsu Mcgarrybowen	Media AOR	US	OMD USA	Yes	
Honda	Unknown	Media	US	[Review in Process]	Yes	
Inspire Brands	Unknown	Media AOR	US	Publicis Groupe	Yes	
Kraft Heinz Continental Europe	Unknown	Social Media AOR	Europe	We Are Social	Unknown	
Lexus	Digitas	CRM	UK	WPP Agencies (and The&Partnership)	Unknown	
Mike's Hard Lemonade	Havas Chicago	Creative AOR	Unknown	WorkInProgress (WIP)	Unknown	
Mike's Hard Lemonade	Unknown	Media AOR	Unknown	Haworth Media	Unknown	
Moderna	Unknown	Creative AOR	Unknown	TBWA\Chiat\Day LA	Unknown	
Proximo Spirits	Various Agencies	AOR	Unknown	Eleven	No	
Pernod Ricard USA	Unknown	Lead Creative Agency	Unknown	Ogilvy	Unknown	
Reborn Clothing Co.	None	AOR	Unknown	French/West/Vaughn (FWV)	Unknown	
Reckitt Benckiser (RB)	Initiative Media	Media Strategy, Digital Planning and Purchasing	Central European	Publicis Groupe	Yes	
Slack	Unknown	Media Planning and Buying AOR	US, EMEA	Mediahub	Yes	
Samsung	Publicis Groupe	Creative AOR	US	Publicis Groupe	Yes	
Safelite AutoGlass	Ron Foth Advertising	Creative AOR	Unknown	FCB	Yes	
Sam's Club	None	AOR	Unknown	VMLY&R	Yes	
Schwan's Company	Unknown	Creative AOR	Unknown	TBWA\Chiat\Day LA	Unknown	
Sky Vodka	VMLY&R and Various Agencies	AOR	Global	Mono	Yes	
Stella Watch Company	Unknown	Media AOR	Unknown	Generator Media + Analytics (GM+A)	Unknown	Stella Watch Company
Terminix	Unknown	Creative AOR	Unknown	The Martin Agency (TMA)	Yes	
Terminix	Unknown	Media AOR	Unknown	Mediahub	Yes	
United Airlines	Dentsu Mcgarrybowen	Creative	Unknown	[Review in Process]	Yes	
Walmart	Haworth	Media	US	[Review in Process]	Yes	
Zippo	DeVries Global	Creative, PR and Social AOR	Global	Ogilvy	Unknown	