

# Industry Update

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

April 2021 | Volume 54



## In this issue:

### TALENT



#### Securing the right talent and resources

The Oprah Winfrey interview of Prince Harry and Meghan Markle, the Duchess of Sussex, received much attention, especially as the topic of racial injustice... **continued on pg. 2**

### WORK



#### Producing great work and outcomes

As we learn to work and operate in a COVID world using video conference technology and online collaboration tools, agencies and clients ask themselves... **continued on pg. 5**

### FINANCIALS



#### Driving efficient use of resources

Not everyone is hurting... In the first quarter, Nasdaq welcomed a record-breaking 275 IPOs to our exchange, raising \$74.4B in total proceeds. Three-year... **continued on pg. 6**

### PERFORMANCE



#### Driving stronger performance and value

Success is highly subjective these days. Every financial or performance challenge seems mild when you get reminded of Stefan Thomas's unfortunate... **continued on pg. 8**

### AGENCY



#### Agency reviews and roster changes

Cable and internet provider **Atlantic Broadband** selected Stagwell Group and five of its agencies—Kettle as creative agency of record; ForwardPMX... **continued on pg. 10**

### ARTICLE



#### Driving DE&I in Advertising Production

Key takeaways from leading experts in DE&I on how brands and agencies can implement real changes in their production—including some of the challenges... **continued on pg. 6**

#### EXECUTIVE SUMMARY: Monthly recap

Cannes Lions Festival announced that it's going 100% digital for its second straight year, indicating that the light is there but still at the end of a long, very long tunnel.

Global agencies reported their 2020 financial performance and, despite single-digit revenue drop and a painful decline in organic growth that led them to cut expenses and streamline operations, they all seem highly confident that recovery is just around the corner. Hey, COVID, hope is highly contagious, too. Some agencies—S4 Capital and Stagwell Group had a strong 2020, so not everyone is starting the year weakened.

Conventional advertising and traditional comm are not where growth will come from, but instead we will see a rise in eCommerce, experience, and digital. There is no greater evidence than reports that the combined trio Facebook, Google, and Amazon now account for 90% of all digital advertising spend in the US. What to expect in the foreseeable future?



Well, Pulitzer Prize winner David McCullough said that there's no such thing as a foreseeable future.

We agree.

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

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

The Oprah Winfrey interview of Prince Harry and Meghan Markle, the Duchess of Sussex, received much attention, especially as the topic of racial injustice remains a priority for consumers and brands alike. Developing an equitable supply chain in our industry for marketing and advertising investments is not only morally and socially right, but it also contributes to innovation, improved messaging, and cultural relevancy. Diversity and inclusion remain a top priority for brands and agencies alike. Are you tired? As it relates to talent, the notion of burnout seems to also gain momentum as a result of the WFH phenomenon, with no clear boundaries and always-on pressure. Per Sitecore, 59% of marketers wanted to quit their job at least once in 2020, 80% saying their responsibilities increased a great deal.

- Per Ad Age Datacenter, **overall worldwide headcount** fell 5.8% at the five major holding companies (22,000 jobs) in 2020, ranging from an 8.4% reduction in headcount at Omnicom Group to a 2.8% decrease at Dentsu Group. The combined worldwide headcount was 358,663 by year end.
- Optical brand **Oakley** signed its first professional eSports player, “Call of Duty” champion Seth “Scump” Abner as its first eSports athlete, who will wear Oakley eyewear during all competitive matches and gaming live streams.
- Ascential’s **Cannes Lions** organization decided that the 2021 Festival of Creativity (held in June) will be a fully digital event for its second straight year.
- **WPP** was named a leader among commerce services providers by Forrester Research. It’s the first time the holding company joins Deloitte, IBM, and Accenture, citing global or multi-business unit commerce architectures; emerging commerce touchpoint services; commerce experiences supporting services; privacy and compliance; program management; vision; and partner ecosystem.
- **WPP** announced that it employs 13,500 commerce services experts across the world, working for clients that handle over \$30 billion of online transactions annually, offering commerce media, social commerce, commerce platform development, marketplace management, and shopper marketing. WPP works in collaboration with its partners across all major commerce technology platforms including Adobe, Amazon, Alibaba, Salesforce, SAP, Shopify, and Sitecore.
- Per **American Association of Advertising Agencies (4As)**, 92% of agencies rated the health of their relationships with top clients as “healthy” or “very healthy.”
- Digital media platform **Reddit** (strong of 52 million daily active users) and Omnicom Media Group formed an “enterprise partnership,” which deepens their relationship in an effort to grow advertising on the site.
- Per R3, there are four common challenges when **integrating marketing and procurement functions**:
  - 1) Articulating the role of procurement within marketing,
  - 2) Embedding procurement within marketing,
  - 3) Developing the right marketing procurement team,
  - 4) Managing the agency dynamic.

- Retail giant **Walmart** hired the former head of Disney Parks’ in-house creative agency (Jean Batthany) as its first chief creative officer. The executive led and championed creative, innovation, design, and digital integration at Yellow Shoes, the 250+ person in-house agency for Disney Parks, Experiences, and Consumer Products.

**New agency or capabilities, restructuring, and reorganizations:**

- Shaquille O’Neal launched Atlanta-based **Majority**, an independent, creative marketing agency to offer services which include advertising, branded entertainment, product innovation, and experiences as well as art and activism. The basketball celebrity is partnering with advertising veteran and ex-Momentum executive Omid Farhang.
- **Dentsu’s iProspect** rebranded itself as an end-to-end global media shop that combines the best of performance marketing with brand building, following its merger with Vizeum in November. The entity combines digital expertise, audience knowledge, and performance mindset and capability with brand building, media strategy, planning, and storytelling. The new agency has 8,000 employees in 93 markets.
- New production house **Wild Gift** launched to provide branded content on all platforms, working with award-winning directors. The founders, two commercial production veterans, claim having access to unique talent.
- New BtoB agency **ContentOvation** launched to help brands engage with compelling and engaging content via email and other channels to inform and guide purchase decisions.
- Media-buying data processor **Hudson MX** introduced a new cloud-based media accounting platform, FinanceAssist, for advertisers and agencies to customize media buys based on individual organization and client needs.
- Three new shops launched with the help of former Richards Group employees following a well-publicized scandal (e.g. racist remarks) involving its CEO that rocked the agency and led to many client losses. The new start-up agencies are: **Plot Twist Creativity, Baker & Bonner, and Trace Element**.
- **Havas UK** launched a ‘Retail Accelerator,’ bringing together capability from three of their UK agencies to deliver actionable, business-focused results, combining cross-agency expertise in brand and loyalty across retail.
- **WPP** revamped its data operation and will invest +\$200 million over the next few years in new data operation capabilities (in areas such as analytics and artificial intelligence) and new acquisitions under its media agency network GroupM. This is all in an effort to centralize its many existing data resources that are scattered across its portfolio of agencies.

- Stagwell Group launched **Koalified**, a new end-to-end platform developed by Stagwell Technologies in collaboration with consumer marketing agency MMI Agency, designed to streamline and simplify the relationships between influencers (currently 300+ personalities on Instagram, Facebook, Twitter, YouTube, blogs, TikTok, Pinterest, etc.), brands and agency partners with a single view — from briefs to rate negotiations, contracting, and content creation.
- **Epic Games** (the creator of Unreal Engine and Fortnite) and Sir Martin Sorrell's S4 Capital's MediaMonks joined forces to disrupt production, high-end shoots, and shoots using Unreal Engine. MediaMonks is to open a new office in New Delhi.
- Independent, minority-owned shops Gallegos United and media shop Crossmedia joined forces and launched **United-X**, a new media agency within their offices in NYC and California aimed at multicultural audiences. Both firms will continue to operate independently as well.
- **Disney** merged its branded TV and National Geographic marketing and publicity teams into one agency organized around functional expertise. The agency oversees creative marketing, publicity, media planning, events, talent relations, and award strategies for all content created for Disney+ and the Disney and National Geographic networks.

#### Diversity and inclusion:

- A 2017-2019 **Deloitte study** measured the ROI of diversity and demonstrated the stock price of diverse brands performed 69% better than their counterparts. Consumer preference scores were 83% higher.
- Per the **American Association of Advertising Agencies (4As)**, Black and African American employees made up 5.8% of the agency business, and 68% of them held administrative or entry-level roles last year. 59.5% are female.
- ANA's AIMM released an update of **their list of diverse suppliers** ([ana.net/diversesuppliers](https://www.ana.net/diversesuppliers)) featuring 221 companies — agencies, production, promotion, research, technology, media, and more. Tech companies include: 3DUS, Reset Digital, SideBench Studios, SmartBased Solutions, VisioneerIT, World Wide Technology.
- **Mediahub** hosted its own diversity-owned media virtual event to push for more equitable brand spending with diversity-owned publishers. The event featured six BIPOC- and LGBTQ+-owned digital publishers (Black Girl Digital, Being Latino, Blavity, Gay Ad Network, NGL Collective, and Colossus SSP).
- **ANA's Alliance for Inclusive and Multicultural Marketing (AIMM)** published the Anti-Asian Hate toolkit which includes key actions, tools, and research to help provide a safe haven for the AAPI community.
- **IPG's R/GA** shared its US diversity data for Q1 2021: women talent accounts for 53.5%. POC talent is 36% (mostly Asian 13.8%, Hispanic 9.6%, and Black 7.5%). Black representation in executive leadership has increased from 2.5% to 6.3%
- **P&G** launched an initiative 'Widen the Screen' to increase Black representation in the film, TV, and ad industry, across all touchpoints of the creative process, as a follow up to prior work including 'The Talk,' 'The Look,' and 'The Choice.'
- **World Federation of Advertisers (WFA)** published an open-source guide, co-developed by members of its Diversity and Inclusion Task Force, to improve diversity and representation throughout the creative process.
- Carmaker **General Motors Co.** pledged to increase its spend on advertising with Black-owned media companies, starting with 4% of its U.S. advertising spending on Black-owned media companies by next year, and would boost that level to 8% in 2025. The brand is presumed to spend less than 0.5% of its advertising in Black-owned media currently.

**Note:** AMS proudly joined the pledge from the ANA's AIMM (<https://www.anaaimm.net>) and took a stand against hate and violence targeting the Asian, Asian-American, and Pacific Islander (AAPI) community, alongside many other leaders in our industry. We all need to unite against violence or hate crimes (#SeeALL).

#### Noteworthy quotes:

- » "We are still focused on strong creative talent and strong strategists. What we need more of is people who are able to see the whole picture for clients."  
Mark Read, CEO, **WPP**
- » "We're not an ad tech or martech company. We're part of the service layer." Sir Martin Sorrell, Executive Chairman, **S4 Capital**
- » "Yes, to help create a more equitable world, but also on the thesis that diversity is the ultimate competitive advantage for culturally disruptive creativity."  
Omid Farhang, Founder, **Majority**
- » "The biggest hurdle in virtual pitching is not how to create moments of theater but how to telegraph energy."  
Alex Sturtevant, Director of Brand, **Stink Studios**
- » "The world can't revolve around Zoom alone. Humans are social creatures." Michael Duda, Managing Partner, **Bullish**
- » "Change can only happen through clear KPIs."  
Anne Joffre Bonnaillie, Senior Director of Equity and Inclusion in Advertising, **P&G**
- » "We now work with 76 of our top 100 clients on eCommerce, and we believe the recognition of WPP as a leader in commerce services further strengthens our position as the global omnichannel partner of choice." Mark Read, CEO, **WPP**
- » "When the going gets tough, clients turn to agencies to be their partners." Marla Kaplowitz, CEO, **4As**
- » "Evolving our recruitment approach is a strategic growth driver, and meaningful candidate-centric recruiting with a focus on diversity is critical to the future success of our creative network." Stephanie Nerlich, CEO, **Havas Creative, North America**
- » "The differentiator is not co-location, but how the in-house agency integrates with the organization." Simon Martin, founder and CEO, **Oliver**



- » “One of the ways we’re re-imagining the workspace is sort of as a creative workshop and less as an office space.” Katie Longmyer, Managing Director, **Mother New York**
- » “There’s no doubt that we’re moving toward a more flexible future, where work and life obligations are even more seamlessly interwoven. We also can’t forget that we’re social creatures.” Emma Armstrong, President, **FCB New York**
- » “From a credibility perspective, for ease of work, location mattered. I would say that’s the exact opposite today. What this has shown us is you can tap talent wherever it is.” Matt Fischer, CEO, **Curiosity**
- » “It’s not about being perfect, it’s about progress. When you can recognize and acknowledge there’s a problem, then you can go ahead and do something about it. We want to normalize equality.” Damon Jones, Chief Communications Officer, **P&G**
- » “The commitment to fair representation doesn’t end once the creative is complete.” Dale Green, Global Brand Director, **Mars**
- » “Somebody explained it to me as diversity is like being invited to the dance, but inclusion is being asked to dance. That is just such a great symbol of what inclusion means. That invitation to be part of that workplace family is profoundly important.” Bob Liodice, CEO, **ANA**
- » “New commercial models must leverage automation to evolve our business. How do we scope time and materials when it might be more efficient to use products instead of people? Time and materials incentivize agencies to resist innovation and the ‘future of work,’ prioritizing talent over technology when we need to blend talent with technology.” Julia Hammond, President, **MDC Global**
- » “We need more people who can understand what is happening at Amazon and Adobe and Salesforce... broad-based marketing technology and experience on eCommerce and technology platforms.” Mark Read, CEO, **WPP**

#### Company profiles:

- **Traction** (<https://www.tractionco.com>) is a small, independent San Francisco-based interactive agency that “fully engages every medium necessary to transform human behavior into consumer action.” Services range from strategy and insights, creative and media, technology and operations with a focus on data, speed and efficiency, and enhancing client’s in-house team with talent. Clients include Apple, Adobe, Bank of America, Dolby, Salesforce, Walmart, Lenovo, MGM Resorts, and more.
- **Code and Theory** (<https://www.codeandtheory.com>) is a strategically-driven, digital-first agency that lives at the intersection of creativity and technology. The agency is part of Mark Penn’s Stagwell Group. Services include transformational technology, data analytics and research, services/platforms/products, business and organizational consulting, and integrated marketing with offices in NYC, San Francisco, London, and Manila. Clients include The Atlantic Broadband, Con Edison, MetLife, JPMorgan, NBC News, and more.
- **Heart and Soul Marketing** (<https://gotheartandsoul.com>) is a small, independent, minority-owned (Native American), Phoenix-based agency that provides a full suite of advertising services ranging from brand strategy, creative, PR, media planning/buying, social, web, and video, to brands and non-profit organizations like Activate Food Arizona. Clients include Dial, Church & Dwight, Hotels.com, Starbucks, Virgin Hotels, Energizer, MillerCoors, P&G, Helia Care, Fiorucci.
- **Blue Chip** (<https://bluechipwww.com>) is an independent, Chicago-based creative marketing agency and shopper marketing agency which “offers the talent and scale of a holding company, with the urgency and ownership of a private agency.” Services include research, strategy, brand, creative, media, and shopper. Clients include Braun, Heinz, Molson Coors, Jack Daniels, Honeywell, Wonder, P&G, and others.

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**WORK: Producing great work and outcomes**

As we learn to work and operate in a COVID world using video conference technology and online collaboration tools, agencies and clients ask themselves: What types of tasks, discussions, decisions, and collaboration require physical presence? Zoom fatigue is gaining momentum, and everyone is looking for more productive and efficient ways to get work done. For the first time, this year's April Fools' Day was a risky proposition with few people eager to laugh. Some brands like Volkswagen were even forced to deny reports that it intended to change its name to 'Volkswagen.' Others had fun with it. Hope you had a prank-filled April Fools' Day. One of my favorite ones this year was by MediaPost: "P&G Agrees to Acquire Publicis Groupe."

- Among top **April Fools' Day ads**: BMW of North America and Goodby Silverstein & Partners shot a short film tricking viewers into believing that its BMW car was fully autonomous. Burger King announced the 'Chocolate Whopper'—a flame-grilled beef patty topped with fresh juicy tomatoes and onion, dressed in a layer of rich... chocolate. Mike's Hard Seltzer launched a 'Naturally Good' flavor using charcoal, flaxseed, and kale. To name a few.
- Fast-food giant **Burger King U.K.** deleted a post with an apology, following a widespread backlash, after tweeting "Women belong in the kitchen," coinciding with International Women's Day. The ad campaign aimed at bringing awareness to a lack of female chefs.
- The **National Football League** signed an historic contract giving Amazon.com, Inc., exclusive rights to Thursday football broadcasts (CBS and Fox will continue to carry daytime games on Sundays), a first for a streaming company.
- Per the Winterberry Group, 82% of in-house agencies reported that their **workloads** had increased significantly in recent months, mostly due to COVID-19.
- Dentsu released "**The Age of Inclusive Intelligence**," a study looking at evolving consumer trends and behaviors through the next decade (out to 2030), based on in-depth interviews with futurists, academics, authors, and other experts as well as proprietary consumer surveys covering 20+ countries and more than 30,000 people.
- **Walmart**, Waze, and Mindshare came together to build a media ecosystem centered around the customer, connecting with 12 million on-the-go consumers during decisive micro-moments and increasing navigations 17% compared to last year in just one month, with 48,000 reported store visits.
- New York-based health club and fitness brand **Equinox** launched a new campaign called "Welcome Forward" including a video featuring Olympic fencer Miles Chamley-Watson, produced by its in-house agency.
- Intel's **#GoPC campaign** from VMLY&R featured Justin Long, once the face of Mac in 66 commercials titled "Get a Mac," turning the table on the classic campaign featuring Intel's chips and promoting PCs.
- Fast-casual chain **Chipotle Mexican Grill** gave away \$100K in free burritos and \$100,000 of bitcoin cryptocurrency for National Burrito Day (April 1). Customers must guess the six-digit passcode on its "microsite" to unlock the prizes.

- **IPG Mediabrands and TikTok** joined forces to build an exclusive creator program that will further connect brands with culture. They are forming a bespoke Creator Collective, bringing together talent to ensure the "content is culturally connected, inclusive, and resonates with the TikTok community."
- Per Joy Mead of Blue Chip, **5 tips for a successful agency partnership**:
  - 1) Score your agency relationship
  - 2) Get outside perspectives (what are your business challenges?)
  - 3) Develop a bulletproof brief together
  - 4) Give the agency time to be awesome
  - 5) Be honest about the budget

**Noteworthy quotes:**

- » "Being overly rehearsed can fall flat in person, and over Zoom it's a disaster. The best pitches naturally turn into conversations. The worst feel like webinars." Alex Sturtevant, Director of Brand, **Stink Studios**
- » "We can pitch business anywhere in the U.S. and anywhere in the world. COVID has been the great equalizer for small agencies and new business." Ruth Bernstein, founder and CEO, **Yard NYC**
- » "If you want to see the future, look to China. China is where there is transformation happening. The market flipped a few years ago from the old brand-building model to a digital ecosystem, from bricks and mortar to eCommerce." Marc Pritchard, Chief Brand Officer, **P&G**
- » "There's something about when you're super close with clients, so much happens outside the meeting room in terms of the side conversations." Trish Adams, President, **Opinionated**
- » "Creative thinking is impacting every aspect of agency business for the better. From campaign work, to gaining market share, to strengthening agency-client relationships, this prolonged time of crisis has posed its challenges, as well as opportunities to learn how to work smarter and make a real impact." Marla Kaplowitz, CEO, **4As**
- » "In many ways, it's more personal talking to people in their dining rooms or kitchens or wherever people are working from," Mark Read, CEO, **WPP**
- » "The office actually needs to become an experience." Rob Lambrechts, Chief Creative Officer, **Pereira O'Dell**
- » "We want maximum flexibility based on the job/work to be done. From there, we'll bring the right people together to get to the best creative outcome in the fastest, most efficient way." Marc Pritchard, Chief Brand Officer, **Procter & Gamble Co.**
- » "The pandemic has put marketing more squarely back in the middle of a company's operations, and that data and analytics have become a bigger piece of the marketing puzzle." Ivan Pollard, Global CMO, **General Mills**
- » "Much like our own human, personal relationships, we know that where there is greater transparency and trust, there are stronger, healthier ties." Joy Mead, EVP, General Manager/Business Leadership, **Blue Chip**

**FINANCIALS: Driving efficient use of resources**

Not everyone is hurting... In the first quarter, Nasdaq welcomed a record-breaking 275 IPOs to our exchange, raising \$74.4 billion in total proceeds. Three-year-old London-based digital marketing company S4 Capital reported 15.2% revenue growth last year when most holding companies suffered, indicating that growth is possible when you make the right strategic bets. The firm led by Sir Martin Sorrell added clients and acquired agencies in high-value/ growth services like digital marketing, analytics, and eCommerce (Digodat and Circus Marketing) and Amazon.com, Inc., focused-shop Orca Pacific, and Toronto-based design shop Jam3, Inc. S4 Capital is not alone. Stagwell Group, which is preparing to merge with MDC Partners, also grew 41.3% YOY.

- Per eMarketer, **Amazon's** share of the U.S. digital advertising market reached +10% for the first time in 2020. The eCommerce giant's ad business grew 53% YOY to \$15.73 billion. Amazon's U.S. ad business is expected to grow another 30% and exceed \$20 billion for the first time, and possibly \$30 billion by 2023. Amazon's search advertising is expected to reach \$14.53 billion this year (19% market share).
- Per Magna, the **advertising industry's total revenues** will increase 6.4% to \$240 billion in 2021, an increase over prior projections (+\$10 billion), driven verticals such as travel, automotive, drinks, and entertainment. GroupM updated its U.S. advertising outlook for 2021, expecting total ad spending to expand +9% over 2021.
- Per the Interactive Advertising Bureau (IAB) and PwC, **internet ad spending** increased 12.2% during 2020 to \$139.8 billion, with the 2nd half of the year being more than a rebound with double-digit growth.
- Per GroupM, the big tech "**triopoly's**" (**Facebook, Amazon, and Google**) share of the digital advertising market climbed from 80% in 2019 to 90% in 2020 as consumers and brands shift to online and eCommerce.
- Despite being famous rivals and aggressive competitors, **Apple** and **Google** maintain behind the scenes a deal worth \$8 billion to \$12 billion a year, per the U.S. Department of Justice.
- **AT&T's HBO Max** committed \$80 million in upfront advertising to invest further in the entertainment platform and rising subscription video-on-demand service. Strong of 61 million HBO worldwide subscribers, WarnerMedia will release 18 theatrical movies on HBO Max at the same time as in theaters.
- As part of its cost reduction efforts, **WPP** sold 60 businesses (or stakes in companies) in 2020 or the equivalent of \$4.9 billion. It merged 100 local offices worldwide and closed 80 business units, reducing its debt by +\$5.5 billion.
- Strong of 13,500 commerce experts, **WPP** designed, built, and managed client sites that handle more than \$30 billion of online transactions annually, including \$10 billion on Amazon.
- The Association of National Advertisers (ANA) created a **Vendor Consolidation Checklist** to highlight key vendor contracts, assess current vendor relationships, and negotiate better terms.
- **Google** blocked or removed 3.1 billion ads from its platform worldwide last year for violating hate speech, fraud, and other policies and placed restrictions on 6.4 billion ads that were deemed "legally or culturally sensitive."
- **Less office space:** The two largest U.S.-based agency holding companies (Omnicom and IPG) cut 2.7 million square feet of office space: 1.7 million at IPG and more than 1 million at Omnicom.
- Per Forrester, **channel software tech stack** in 2021 includes 183 companies, or \$2.8 billion in software revenue, and is expected to reach \$5.7 billion by 2026.
- **Omnicom's OMD** added \$1.429 billion in new billings in 2020 while also retaining \$578 million in existing business, for a combined win total of \$2.02 billion—the highest for any media agency last year.
- Per investment banking firm Berkery Noyes, **media and marketing M&A transactions** improved 13% over the past three months, from 270 to 303, but aggregate value declined 40%, from \$26.4 billion to \$15.8 billion.

**ARTICLE: Driving DE&I in Advertising Production** Contributed by: Advertising Production Resources

Key takeaways from leading experts in DE&I on how brands and agencies can implement real changes in their production—including some of the challenges you may encounter, direct initiatives to implement today, and thoughtful considerations for the future.

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

- **WPP-owned Wunderman Thompson** acquired Edinburgh-based NN4M, a leading mobile commerce partner for global brands which provides connected, experience-driven solutions across mobile and in-store channels and builds bespoke commerce applications across touchpoints, including smartphone, tablet, apps, and in-store experiences.
- **VICE Media Group** acquired brand consultancy PLTRMR which has been focused on “defining, designing and developing” brand platforms for clients, using a proprietary, modular suite of strategic tools. The combined entity will also have publishing and production as core capabilities.
- **Connelly Partners (CP)** acquired Vancouver-based VRX Studios, a content studio specializing in the hospitality industry with offices in Boston, MA, and Dublin, Ireland. It recently launched Studio M, a new wellness-focused practice.
- Private equity firm **Vista Equity Partners** acquired Ad-tech company TripleLift which utilizes computer vision and machine learning to optimize digital creative and media buys.
- **Beekman Associates**, the UK-based developer and provider of the data-driven marketing procurement platform RightSpend was acquired by mid-market private equity investor LDC for £17 Million (\$23M) in September 2020. RightSpend is claimed to assess £8+ billion of marketing spend annually and save 10-20% on average.

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

- **WPP** reported a net revenue decline of 10% to £9.762B (\$13.6B) in 2020 and cut headcount by 6.5%. Organic revenue declined by 8.2%. The holding company is projecting to return to positive organic growth in 2021. Agencies like VMLY&R performed strongly. GroupM's billing mix increased from 38% digital to 41% YOY. New business wins totaled \$4.4 billion—Intel (global creative), HSBC (global creative), Unilever (China media), and WW (global creative and media). WPP reported 40% more new business in 2020, a conversation hit rate of 45%- 50%.
- **Havas Group's** net revenues declined 9.2% to \$2.46 billion in 2020. Full-year organic revenue declined by 9.9%. Holding company expects to return to growth in 2021. Havas Media brought in new business from Telefonica, Sanofi, 3M, Europcar, and others. Other recent client wins included Epic Games, Tetra Pack, and PMU, including assignments from AbbVie, Astellas, AstraZeneca, Novartis, Pfizer, Roche, and Sanofi for its healthcare-focused Havas Health & You.
- **MDC Partners** reported revenue of \$328.2 million (14.1% reduction) and \$1.20 billion for the year (a 15.3% reduction) despite \$90 million in new business—Jimmy John's, Hotels.com, Netflix, Indeed, Yeti, Skyy Vodka, Behr Paint, etc. The holding company also reported an organic revenue drop of 13.7% for the quarter and 13.9% for the full year 2020. MDC Partners reduced headcount by 781 employees YOY and reported \$136 million savings in staff-related costs.

- **Stagwell Group**, which is preparing to merge with MDC Partners, released its first public earnings report, showing revenue of \$888 million in 2020, up 41.3% YOY. Organic revenue grew 29.1%. Political spending for the 2020 elections contributed to the company's performance.
- **S4 Capital** reported 2020 revenue of \$404.46 million, up 59% from 2019, as a result of acquisitions and growth within its production firm MediaMonks BV and digital marketing shop MightyHive. Over 50% of its revenue comes from clients in the tech industry. The firm doubled its employees in 2020, now reaching 4,400 employees in 31 countries. The firm reported a margin of \$85.7M or 21.1% margin, driven mostly by content, data, and digital media.

**Noteworthy quotes:**

- » “Globally, the five biggest agency groups saw an organic decline of 8.1%. This was better than many of the world's largest TV network owners and was surprisingly better than 2009, when the group declined by 8.4%.” Brian Wieser, Global President, Business Intelligence, **GroupM**
- » “We are long overdue for a change to the compensation model. And there couldn't be a better time than now to shift our partnerships to be contingent on performance.” Julia Hammond, President, **MDC Global**
- » “Over 65% of marketing agencies suffered a decrease in overall revenue, so you had to work tirelessly to keep your agency afloat. You found new clients to replace the revenue lost from paused ones, got your team settled into a work-from-home rhythm, and scrambled to apply for available government assistance. You hosted Zoom happy hours and learned how to navigate new technological systems. So, let's start out with a round of applause: You made it to 2021, and your agency is still functioning.” Drew McLellan, Top Dog, **McLellan Marketing Group**
- » “In 2021, the American advertising industry is poised to regain all that it lost in 2020 and more. Excluding the impact of political advertising, we forecast the industry will grow by 15% this year.” Brian Wieser, Global President, Business Intelligence, **GroupM**
- » “We all know you can't cut your way to greatness, but when agency compensation models condition us to sell time and materials, we are not incentivized to invest or reinvest in the talent, tools, and technology that make our services more valuable.” Julia Hammond, President, **MDC Global**

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Discover how a top biotech firm used training to improve collaboration and productivity with its agencies.

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

Success is highly subjective these days. Every financial or performance challenge seems mild when you get reminded of Stefan Thomas's unfortunate situation. The successful German-born programmer and founder/CEO of tech firm Coil lost the password to a digital wallet that holds 7,002 Bitcoin (estimated to be worth +\$400 million based on current bitcoin value). If Bitcoin had an award ceremony, would he be invited? The first part of Q1 is the opportunity for many awards to celebrate top-performing agencies and brands. Burger King was the most awarded brand of the year in 2020 (with its 'Moldy Whopper' campaign).

- Per Television News Daily, TV entertainment awards show, the **63rd Annual Grammy Awards** on CBS earned \$80-\$82 million in national TV advertising, remaining flat YOY despite a viewing drop (9.2 million viewers or a 51% drop YOY).
- Media buying giant **GroupM**, via a partnership with supply-side platform (SSP) Index Exchange, saved \$1.5 million in supplier fees and overall programmatic supply chain costs. The move also unlocked operational efficiencies by better packaging inventory across publishers based on ad formats and pricing.
- Per R3, a solid foundation for a **relationship between Marketing and Procurement** requires:
  - 1) Defined roles in the context of the partnership
  - 2) Defined way to measure performance
  - 3) A marketing spend map
  - 4) Data and analytics
  - 5) A vendor management process
  - 6) A way to reallocate savings to support marketing

- **Omnicom Media Group** reached an agreement to incorporate BERA (Brand Equity Relationship Assessment), a platform that assesses brand purpose, equity, and other brand metrics into Omnicom's Omni marketing platform.
- **Publicis Groupe** signed a deal with ad-technology company The Trade Desk as an alternative to cookies and ahead of Google's planned moves against third-party cookies, teaming up to create a self-service ad platform for Publicis's Epsilon unit. Publicis is the first holding company to support the Unified ID 2.0 being built by The Trade Desk.

#### Awards:

- Per the **World Creative Rankings**, the 3 most awarded ad campaigns of the year include:
  - 1) 'The Tampon Book' for The Female Company by Scholz & Friends Berlin
  - 2) 'Moldy Whopper' for Burger King by David Miami, Inga, and Publicis Bucharest
  - 3) 'A Sweet Escape' for Chupa Chups by Cheil Hong Kong. Others included Apple (US), IKEA (Sweden), Samsung (US), and Mastercard (US).
- **2021 Andy Awards winners:** You Love Me by Beats by Dr. Dre and its agency Translation LLC, The Unfinished Votes by Change the Ref and its agency McCann Health NY, and True Name by Mastercard and its agency McCann NY. FCB won 7 awards, R/GA won 6 awards, followed by VMLY&R which won 5 awards. Full list: <https://www.andyawards.com/wp-content/uploads/2021/04/Winners-List.pdf>




- Per Agency Spotter, **Top 2021 User Experience Design Agencies** (among 50 ranked across user experience for web, mobile UX, and eCommerce experience as well as user experience for physical products and environments) included:
  - 1) Momentum Design Lab
  - 2) 3 Media Web
  - 3) The Gradient
  - 4) The UX Department
  - 5) Slide UX
- MRM won **2021 Adweek Performance Marketing Action Award for Campaign of the Year** for its work, “The Shifting Voter Mindset,” to encourage confidence in political mail, on behalf of its client, the United States Postal Service.
- Wieden+Kennedy won **2021 Adweek Content Marketing Award** for Campaign of the Year for its work, called “The Future Isn’t Waiting,” depicting schoolchildren being taunted for being different, on behalf of client Nike.
- Publicis Media Groupe company CJ Affiliate won **2021 Adweek Affiliate Publisher Award for Campaign of the Year** for its work on safeguarding consumers’ data, on behalf of its client, Norton.
- Nutrisystem won **2021 Adweek Ecommerce Award for Campaign of the Year** for its campaign “Delivered to Your Door,” promoting its convenient home delivery offering.
- The Bait Shoppe and OnePlus won **2021 Adweek Experiential Award for Campaign of the Year** for its campaign “OnePlus Go Farther” scavenger hunt, a physical-digital hybrid experience, on behalf of client T-Mobile.
- Peloton won **2021 Adweek Social Media Award for Campaign of the Year** for its “Peloton x Beyonce,” a partnership with the celebrity and the brand which created 17.8 million views for its video “Beyonce Classes” in 3 months and helped the brand grow from 2 million to 4.4 million during 2020.
- Postmates and Chipotle won **2021 Adweek Email Award for Campaign of the Year** for its work to “eventize” new offers with an ‘80s throwback (Plinko).
- Impact BBDO won 5 Grand Prix, Agency of the Year, and a Network of the Year Win for BBDO Worldwide at the **Dubai Lynx International Festival of Creativity**, followed by FP7 McCann, which won 3 Grand Prix, 5 Golds, 5 Silvers, and 17 Bronze and TBWA/RAAD.
- Per RECMA, Omnicom’s OMD ranked **top global media agency network**, followed by IPG’s UM and Dentsu’s Carat (which held the top spot for eight consecutive years) out of 700 media agencies across 47 markets. The ranking is based on 19 different criteria including “vitality” metrics, such as competitive pitch performance, client portfolio growth, awards, and others.

#### Noteworthy quotes:

- » “Many corporations don’t want their now-valuable first-party data to be exposed outside their walled gardens. Creative and content development has been tasked with coming in-house so it can leverage data insights more easily to reach and engage customer audience segmentations.” Robb Hecht, Vice President, Account Director, **Hero Collective**
- » “Collaboration is really important. There are some things you just can’t replicate in remote environments. We’ve felt thirsty to get people together for more innovation and creativity. We have to get back on planes to start talking with clients.” John Swift, COO, **Omnicom Media Group**
- » “True reinvention of the industry will come from the agencies and holding companies that reorient their models toward delivering tangible value to client business and tying compensation to business outcomes.” Julia Hammond, President, **MDC Global**
- » “As ad-free streaming services proliferate, ad-supported TV will remain disproportionately important to most of the world’s largest brands and new ways to optimize television ad inventory will become increasingly critical too.” Brian Wieser, President of Business Intelligence, **GroupM Global**
- » “Without the ceremony of everyone flying in and out for the big ‘Presentation’ (with a capital P), our brand-agency teams are connecting with less formality, sharing ideas earlier/more often and having more open conversations. This can actually lead to better work and better relationships.” Marc Pritchard, Chief Brand Officer, **Procter & Gamble Co.**
- » “We made a decision two years ago to make WPP more client-centric and simpler for our clients to navigate by breaking down the artificial walls between traditional [marketing] and digital and analog and digital that made it harder for clients to get media-neutral ideas out of the system.” Mark Read, CEO, **WPP**
- » “Until we move the industry forward to outcome-based compensation, we’ll continue to suffer from transactional, commoditized relationships.” Julia Hammond, President, **MDC Global**

Check out Bruno Gralpois' ClickZ article "[How Will Technology Transform the Fragile Client/Agency Ecosystem?](#)": What radical changes should advertisers expect in a post-COVID world that is technology-led and rapidly changing? And how should they best prepare themselves to take on these new opportunities?



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AGENCY MANIA SOLUTIONS  
Strategic Partnerships Delivered

**Commentary Piece**

**How will technology transform the fragile client/agency ecosystem?**

Courtesy of R3:

26 March - 8 April 2021



# PITCH REPORT

## CREATIVE/DIGITAL ACCOUNT MOVES

REGION	BRAND	WINNER	CREATIVE	SHOPPER	BRANDING	DIGITAL	INCUMBENT	EST BILLINGS
US	Atlantic Broadband	Kettle					n/s	\$10m
US	Avocados from Mexico	GSD&M					Energy BBDO	\$50m
UK	Casio	Journey Further					n/s	\$10m
US	ConEdison	Code & Theory					Havas	\$30m
US	Cracker Barrell	Dentsu					The Richards Group	\$80m
UK	Credible	Engine					n/s	\$8m
US	Dr. Scholl's	OMD USA					Dentsu McGarrybowen	\$50m
Global	Infiniti	Publicis Groupe					n/s	\$150m
US	Instagram	Johannes Leonardo					Ogilvy	\$150m
US	Sam's Club	VMLY&R					n/s	\$300m
Global	Skyy Vodka	Mono					VMLY&R	\$30m
US	Splenda	Blue Chip					n/s	\$50m
Canada	Unilever	LPI Group					Geometry, Barrows	\$15m
Global	White Claw	Rothco					n/s	\$20m

# PITCH REPORT

## MEDIA ACCOUNT MOVES

REGION	BRAND	WINNER	MEDIA	INCUMBENT	EST BILLINGS
US	Atlantic Broadband	ForwardPMX		n/s	\$10m
US	ConEdison	Assembly		Havas	\$30m
US	Cracker Barrel	Dentsu		Havas Chicago	\$80m

## NEW ACCOUNTS IN REVIEW

REGION	BRAND	INCUMBENT	CREATIVE	MEDIA	COMMS.	SOCIAL	CRM	EST BILLINGS	LED
China	BMW	n/s						\$40m	R3
Global	Facebook	Mindshare/Dentsu						\$750m	n/s
Global	Hoka One One	Multiple						\$50m	R3
UK	KFC	Iris						\$15m	n/s
Global	Philips	WPP, Dentsu, Omnicom						\$300m	R3
Global	Unilever	Multiple						\$8,000m	n/s

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## AGENCY: Agency reviews and roster changes



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


- Cable and internet provider **Atlantic Broadband** selected Stagwell Group and five of its agencies—Kettle as creative agency of record; ForwardPMX as AOR media; Rhythm for web marketing; Wye Communications for PR, and HarrisX for research, following a review and replacing various incumbent specialty (b-to-b marketing, b-to-c marketing, PR and social) shops.
- Kitchen and bath brand **American Standard** parent LIXIL Corporation selected Empower as its media AOR following a review. The agency became the brand's social media AOR a year ago, which included paid media and creative responsibilities, before expanding responsibilities.
- Insurance giant **Allianz** selected Omnicom Group, and a new Omnicom unit called the A-Lab, to handle creative and production services in 70+ countries in a multi-year agreement, following a review. "A-Lab" is comprised of a multi-disciplinary team of leaders from inside and outside the holding company.
- Cabinets firm **American Woodmark Corporation** selected MullenLowe New York as its AOR following a review. The agency will handle brand strategy, design, and digital transformation. The brand consolidated its business from a half dozen shops specializing in different disciplines. There was no incumbent.
- **Burger King China** selected UM China (within Mediabrands) as its media planning and buying AOR following a review. Key factors included the agency's Futureproof philosophy, strength in data and personalized content, and result-driven approach.
- **Broken Shed Vodka** selected Schafer Condon Carter and its subsidiary agency TimeZoneOne as its new agency partners. The agency will handle creative, digital marketing, strategy, website and social content development, and paid media.
- Restaurant and retail chain **Cracker Barrel Old Country Store** selected Dentsu as its creative and media AOR following a review, replacing incumbents Havas Chicago and indie shop The Richards Group. The agency will handle strategic, consumer insight, creative, and managing paid media.
- Skincare company **Coppertone** selected Huge as its creative AOR following a review and replacing 6-year incumbent Wunderman Thompson. The agency will handle brand creative, retail support, and activation.
- Energy company **Con Edison** selected Stagwell Group-owned digital-first creative agency Code and Theory as its AOR, replacing incumbent Havas. The agency will partner with MDC Partners' Assembly on media buying and planning responsibilities, with the two agencies collaborating closely.
- Premium pet foods brand **Champion Petfoods** selected TDA Boulder as its integrated AOR for North America, following a review conducted internally. The agency will handle creative, media, and strategy across all of Champion Petfoods' brands and include audio, experiential, digital partnerships and display, digital video, mobile, print, and social.
- Not-for-profit health insurance group of companies **EmblemHealth** named WPP's VMLY&R as creative and integrated AOR following a review. The agency will handle brand communications, marketing strategy, creative assignments, and media planning for all of EmblemHealth's companies.
- California-based poultry brand **Foster Farms** hired independent agency Erich & Kallman as its AOR without a review. The agency will handle strategic direction, creative ideation, and production, replacing incumbent agency Deutsch LA, who will continue to handle media duties. The brand worked with Erich & Kallman on a project basis prior.
- Social media giant **Facebook** added Johannes Leonardo to its creative agency roster for Instagram, working in partnership with its internal Creative X team which acts as the primary driver in partnership with a suite of external creative agency partners.
- Social media giant **Facebook** kicked off a global review of its media buying and planning across all of its properties, the first review of its media business in the past 7 years. Primary agency incumbent WPP-owned GroupM's Mindshare is defending, along with other media agencies like Dentsu. Facebook spent an estimated \$650 to \$750 million on media globally in 2020.
- Chicago-based and Blackstone Group-owned water park operator **Great Wolf Resorts** selected Erich & Kallman as its creative AOR and Horizon Media as media AOR, following a review and replacing incumbents MRM/McCann for creative and Spark for media.
- Nissan-owned luxury auto brand **Infiniti** selected Publicis Groupe as its new brand, creative and media AOR following a 9-month review and replacing 7-year incumbent MDC Partners-owned CPB. The brand has been working with 10 different agencies for creative, digital, and social, including Crispin Porter + Bogusky in the US since 2014. The holding company created a dedicated cross-disciplinary team based on its "Power of One" model, called "Publicis Q." Media buying continues to be handled by Omnicom's OMD.

- Global restaurant chain **Jollibee** (Honeybee Foods Corporation) selected Innocean Worldwide-owned and California-based David&Goliath as its U.S. AOR as part of the company's expansion plans.
- Beverage firm **Keurig Dr. Pepper** selected Havas Media as its US and Canadian media AOR, replacing incumbent IPG Mediabrands' Initiative, as part of a consolidation exercise. The agency will partner with creative agencies—Havas and IPG's Deutsch.
- Microsoft-owned social networking platform **LinkedIn** selected Dentsu media agency iProspect as its global paid media AOR. The agency will handle all digital media strategy and buying (mobile, paid search, programmatic, social, and video across B2B and B2C) across all of LinkedIn's business units globally, in partnership with the brand's in-house digital strategy and operations teams.
- Brewer **Molson Coors** assigned Accenture-owned shop Droga5 to handle the new Topo Chico Hard Seltzer, the alcoholic version of the Coke-owned sparkling water brand. The brand is already working with Droga5. The agency will handle brand creative, paid and organic media, social/influencer marketing, and traditional earned media/PR.
- The Hershey Company's **ONE Brands** selected Chicago-based independent creative marketing agency Blue Chip as its shopper marketing AOR for the protein bar brand (acquired by The Hershey Company). The agency will handle all shopper marketing. The agency already works with P&G, Haribo, Braun, Kraft-Heinz, and others.
- **Pernod Ricard** selected WPP's Ogilvy as global lead strategy and creative agency for Swedish Absolut Vodka following a review, replacing incumbent BBH. Pernod Ricard also selected Ogilvy to handle brands Olmeca Altos Tequila, Tequila Avión, and Del Maguey.
- San Francisco-based consumer financial services firm **Tally** selected IPG's Mediahub as its U.S. Media AOR following a review. The agency will handle U.S. media strategy, planning, and activation for the brand.
- CPG giant **Unilever** (Knorr, Dove, Axe, Ben & Jerry's, and many other brands) kicked off a media review in North America. Its first large media review in the last 6 years. The brand recently awarded its U.S. retail, eCommerce, and shopper marketing account to Publicis Groupe Arc Worldwide. Incumbents WPP Mindshare and others, like Omnicom and IPG, are expected to defend. Unilever reported \$8.1 billion in brand and marketing investment globally in 2020.
- Food cooperative **Wakefern Food Corp.** (ShopRite, Price Rite, The Fresh Grocer, Fairway, Gourmet Garage, etc.) selected digital marketing agency Huge Brooklyn as its digital brand AOR. The agency will handle web, mobile, social, eCommerce, and in-store digital.



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## Agency roster summary

CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?	COMPANY LOGO
Atlantic Broadband	Various (B-to-B, B-to-C, PR and social)	Creative AOR	US	Kettle	Yes	
Atlantic Broadband	Various (B-to-B, B-to-C, PR and social)	Media AOR	US	ForwardPMX	Yes	
Atlantic Broadband	Various (B-to-B, B-to-C, PR and social)	Web Marketing	US	Rhythm	Yes	
Atlantic Broadband	Various (B-to-B, B-to-C, PR and social)	PR	US	Wye Communications	Yes	
Atlantic Broadband	Various (B-to-B, B-to-C, PR and social)	Research	US	HarrisX	Yes	
American Standard	Unknown	Media AOR	Unknown	Empower	Yes	
Allianz	Unknown	Creative and Production	Global	A-Lab (Omnicom Group)	Yes	
American Woodmark Corporation	None	AOR	US	MullenLowe New York	Yes	
Burger King China	Unknown	Media Planning and Buying AOR	China	UM China (Mediabrand)	Yes	
Broken Shed Vodka	Unknown	Digital and Creative AOR	Global	Schafer Condon Carter and TimeZoneOne	Unknown	
Cracker Barrel Old Country Store	Havas Chicago and The Richards Group	Creative and Media AOR	US	Dentsu	Yes	
Coppertone	Wunderman Thompson	Creative AOR	Unknown	Huge	Yes	
Con Edison	Havas	Creative AOR	US	Code and Theory (Stagwell Group)	Unknown	
Champion Petfoods	Unknown	Integrated AOR	North America	TDA Boulder	Yes	
EmblemHealth	gyro	Creative and Integrated AOR	US	VMLY&R	Yes	
Foster Farms	Deutsch LA	AOR	US	Erich & Kallman	No	
Facebook (Instagram)	Unknown	Creative	Unknown	Johannes Leonardo	Yes	
Facebook	Defending: Mindshare, Dentsu, etc.	Media Buying and Planning	Global	[Review in Process]	Yes	
Great Wolf Resorts	MRM/McCann	Creative AOR	US, Canada	Erich & Kallman	Yes	
Great Wolf Resorts	Spark	Media AOR	US, Canada	Horizon Media	Yes	
Infiniti	CPB (MDC Partners)	Brand, Creative and Media AOR	Global	Publicis Groupe	Yes	
Jollibee	Unknown	AOR	US	David&Goliath	Unknown	
Keurig Dr. Pepper	Initiative	Media AOR	US, Canada	Havas Media	Unknown	
LinkedIn	Unknown	Paid Media AOR	Global	iProspect	Unknown	
Molson Coors (Topo Chico Hard Selzer)	None	Creative, Media, Social, PR		Droga5	Unknown	
ONE Brands	Unknown	ShopperMarketing AOR		Blue Chip	Unknown	
Pernod Ricard (Swedish Absolut Vodka)	BBH	Strategy and Creative	Global	Ogilvy	Yes	
Tally	Unknown	Media AOR	US	Mediahub	Yes	
Unilever	Defending: Mindshare, Omnicom, IPG, etc.	Media	North America	[Review in Process]	Yes	
Unilever	Unknown	Retail, eCommerce, Shopper	US	Arc Worldwide (Publicis Groupe)	Yes	
Wakefern Food Corp.	Unknown	Digital Brand AOR	US	Huge Brooklyn	Unknown	