

# 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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## EXECUTIVE SUMMARY: Monthly recap

Three of the world's top billionaires—Jeff Bezos, Richard Branson, and Elon Musk—are in a thrilling space race. In the meantime, back on Earth, the world of advertising is dealing with less celestial but equally exciting challenges: data and privacy, machine learning and automation, ecommerce growth, and changing consumer behaviors.

For a while, advertising was not rocket science. And then, it kind of became far more complex and we are now dealing with the aftermath of that transformation: A cookie-less world is putting greater emphasis on first-party data.

An ecommerce-led economy is making larger players like Amazon, Google, and Facebook even bigger, building new advertising engines and targeting competencies to tackle billions of marketing dollars and trillions of instant messages and engagement opportunities.

Marketing is now part science.



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

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

The chase is on to hire the best talent. As the economy picks up in momentum, brands and agencies are looking for top talent. And talent comes in various flavors, addressing the most pressing needs in our industry. Havas Media Group announced a new role overseeing “ethical media” partnerships, showing the importance of more transparent practices in media activities. Agencies like FCB Global are hiring new data science roles. In a content-rich world where technology, data, and creativity converge, production skills become increasingly critical. Is it a coincidence that WPP appointed Dave Rolf as Global Head of Production (for WPP and Hogarth) at the same time Publicis Groupe appointed Sergio Lopez to its newly created position of EVP, Global Head of Production? Probably not. Major holding companies are building capabilities focused on innovation and efficiencies.

- Adweek produced **Creative 100**—a list of agency leaders reshaping the industry, taking risks, getting outstanding results, and setting new standards for their clients and teams. Examples include Resh Sidhu, executive creative director at Barbarian Group and Frank Cartagena, chief creative officer at The Community NY.
- Top 5 topics discussed at **Ad Age Small Agency Conference & Awards**: smarter ways of doing business, how to win and keep clients, walking the walk on diversity and inclusion, battling burnout, and trends that will survive the pandemic.
- **Ogilvy Health** formed a partnership with Doceree, a global network of physician-only platforms for programmatic marketing, leveraging real-time programmatic audience targeting, measurement, and reporting in North America.
- Per RECMA, **Initiative** was the most competitive network globally in 2020 in media pitches, followed by OMD, Havas Media, PHD, Carat, and Wavemaker.
- New York-based independent shop **SuperHeroes** created “The Client Pitch,” a process that invites brands to pitch for the shop’s services with participants scored for their “bravery” and “collaboration,” product, budget, and timing.
- Accenture Interactive-owned **Droga5** expanded its global footprint by opening an office in Tokyo with plans to add offices in China and Brazil within the next 12 months.
- One virtual elevator and five minutes: CPG giant Procter & Gamble, in partnership with Ad Age’s Small Agency Conference & Awards, continues its **Elevator Pitch**, a virtual forum that gives participants five minutes to make an indelible impression. Participants must answer two questions:
  - 1) What makes your agency unique for P&G?
  - 2) What is the best creative work from your agency and why?
- **Agency Mania Solutions** launched its Agency Mania University (AMU), a self-serve online training program offering learners of any level—marketers, procurement professionals, agency management teams—critical best practices and agency management competencies.

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

- Interpublic Group (IPG) combined FCB Health and McCann Health under a single P&L operating model and a new global network and health-care behemoth, **IPG Health**. Each brand will still market itself independently.
- Interpublic Group (IPG) launched a data-driven creative/CRM agency called **Performance Art**, bringing together deep data, technology, and CRM expertise with creative talent. The full-service, global digital agency network will partner closely with IPG companies including Acxiom and Kinesso.
- Indie agency Omelet launched a gaming marketing consultancy, called **Cheat Code**, offering services ranging from mainstream and gaming expertise, brand and go-to-market strategy development, full creative, and production.
- Performance marketing firm **Tinuiti** launched an Influencer Marketing unit. Tinuiti plans to build its own influencer platform using Mobius, the company’s AI-enabled marketing intelligence and media activation technology.
- Marketing services firm **You and Mr. Jones** launched a new ecommerce services unit, strong of a \$100 million fund to acquire technology tools and platforms and led by a former Amazon executive. The dedicated unit will help brands build their own in-house ecommerce capabilities.
- Havas partnered with Wellcom Worldwide to launch global production business **Havas Studios**, structured as a joint venture and creating 12 integrated digital production studios across 10 markets by 2022.
- Chicago-based ecommerce agency **Labelium** launched a digital media planning and buying service unit called Labelium Play that integrates brands into video, audio, and gaming platforms such as YouTube, Spotify, and Twitch.
- **Omnicom Commerce** and retail-focused agency The Integer Group launched its Growth Sciences Practice, leveraging a proprietary data platform designed to predict and shape shopper behaviors and outcomes.

**Diversity and inclusion, environment:**

- 4A’s introduced its **Workplace Enlightenment Certification (WEC)** program in 2020 to move agencies toward the highest standards of equity and inclusion. Results: 500+ leaders trained and 5000+ completed its online training.
- **World Federation of Advertisers (WFA)** launched the first-ever global census of the marketing and advertising industry, designed to analyze workforce composition and diversity across the industry and set benchmarks.
- **Publicis Groupe** increased the diversity of its US workforce, bringing its total non-white representation to 32.7% of 21,000+ employees across all levels.

- **Google** made its internal marketing toolkit, called All In, available to everyone to foster greater inclusion. Key guiding principles:
  - 1) The makeup of a team matters
  - 2) Know whose stories are missing
  - 3) Real stories are nuanced, and nuance creates authenticity
  - 4) Think about inclusion early and often
  - 5) Stereotypes are harmful—and boring
  - 6) Understand your brand's role
- **Coca-Cola North America** announced it committed to double its media spend with minority-owned companies over the next three years. At least 8% of its yearly ad budget will be directed to Black-, Hispanic-, and Asian American-owned platforms and their partners by 2024.
- Byron Allen's Entertainment Studios Networks Inc. and Weather Group LLC sued **McDonald's Corp.** for \$10 billion, alleging that McDonald's is damaging Black-owned media companies through discriminatory ad-buying practices, claiming that 0.31% of the \$1.6 billion that McDonald's spent on US TV in 2019 was spent on Black-owned media.
- Publicis Groupe-owned company **Publicis Media** launched a new initiative called the Once & For All Coalition to build a more "equitable ad ecosystem" and remove barriers to equitable financial opportunity and representation of underserved and ethnically diverse suppliers, investing \$25 million in diverse content creation in conjunction with its minority- and women-focused APX Content Ventures. The agency and its client partners also established a multi-year commitment to increase investments in diverse media.
- A group of 20 top brand advertisers (including AARP, adidas, General Mills, L'Oréal USA, Nestle, Target, Pernod Ricard, Tyson Foods, DoorDash, Mars, and others) pledged to spend at least 2% of their annual media budgets in Black-owned media through **GroupM's Media and Inclusion Initiative**.
- Online grocery platform **Instacart** made a \$1 million advertising investment to help consumers find Black-owned consumer packaged goods (CPG) brands across its marketplace.
- The **Association for National Advertisers (ANA)** launched a measurement tool called the Swayable-ANA ESG Brand Perception Index that ranks brands monthly by environmental, social, and governance impact.
- Holding company **Interpublic Group** announced a new climate plan including a commitment to sourcing 100% renewable electricity by 2030 as well as setting an emissions reduction target in line with limiting global temperature rise to 1.5 degrees Celsius through the Science Based Targets initiative, as part of its broader ESG commitment.
- **Havas Group**, through its Havas Impact+ environmental pillar, achieved a reduction of greenhouse gas (GHG) emissions by 32% in 2020. By 2025, the firm pledges to achieve carbon neutrality. Other goals include a 5% decrease in electricity consumption; a shift to 25% supply of renewable energy; a 20% decrease in non-hazardous waste generation; a shift to 100% use of recycled and/or certified paper; a 40% decrease in paper consumption, etc.
- **IPG's McCann Worldgroup** launched a sustainability department and appointed a new role of global director of sustainability. The role is responsible for the group's net-zero transition (by 2040), the agency's initial global sustainability commitments and carbon reduction strategies, internal sustainability education, global partnership strategy, as well as management of the network's carbon footprint analysis and client engagement.

### Noteworthy quotes:

- » "Only in very specific moments of high tension or disruption are we compelled to rethink our position on things... and that's why crises are such opportunities."—Malcolm Gladwell, Author and Co-Founder, **Pushkin Industries**
- » "Words only go so far. Actions go the distance." — Marla Kaplowitz, President and CEO, **4A's**
- » "Investing in your agency partnership is the most effective way to drive long-term ROI." —Sebastien Slek, Global Sourcing Marketing, **WarnerMedia**
- » "I want leaders accountable for change, myself included. It's got to start with me."—Lorraine Twohill, CMO, **Google**
- » "Creative agencies that aren't media literate are being left behind and [so are] media agencies that aren't creatively literate."—Mat Baxter, Global CEO, **Huge**
- » "The agency business is a relationship business. It's about putting the needs of your client front and center. Your success is based on their success. Their good days are your good days; and conversely, their bad days are your bad days."—Robin Boehler, Co-founder, **Mercer Island Group**
- » "From a purely operational standpoint, companies are obviously taking a harder look at workplace and talent flexibility given the ability of teams to work remotely online."—David Beals, President, **JLB + Partners**
- » "Marketing procurement joins this with the science of technology and, post-COVID-19, takes its place at the table with a greater role than ever."—Christine Moore, Managing Director, North America, **FirmDecisions**
- » "For our clients, we are their Partner of Record—an engine of innovation and a source of agility." —Sir Martin Sorrell, CEO, **S4 Capital**
- » "Let's invest in the people, because fancy offices don't come up with ideas."—Gustavo Lauria, Co-Founder and Chief Creative Officer, **We Believers**
- » "If you want to survive and thrive in our business, you have to learn how to reinvent yourself. And you have to transform. You have to learn new skills. You have to learn new disciplines."—Rob Schwartz, Chairman, **TBWA New York**
- » "A small agency has to be vigilant over what makes them special. Lack of layers and bureaucracy gives you the freedom and ability to do so."—Greg Hahn, co-founder & CCP, **Mischief USA**
- » "One of the ways we choose our battles is with the caliber of the competition. It's a signal the work will be good."—Kristen Cavallo, CEO, **The Martin Agency**

**Company profiles:**

- **Kyra (<https://kyra.com>)** is a Gen Z media company creating engaging digital content that resonates with youth culture, connecting brands with Gen Z through voice, talent, reach, and original programming of the most exciting and influential creators in the world. The five-year-old agency tracks and monitors over 150 million accounts across TikTok, Instagram, and YouTube (7 billion engagements tracked and 3 million daily data points). Clients include Nike, L'Oréal, adidas, Google, Netflix, Hugo Boss, Coca-Cola, Puma, Samsung, Gucci, and Unilever.
- **S4 Capital ([www.s4capital.com](http://www.s4capital.com))** is a tech-led, purely digital, new-age/era digital advertising and marketing services company focused on data, content, and programmatic with creative production capabilities on a global scale. The firm was established and is led by Sir Martin Sorrell (ex-CEO of WPP for 33 years). Strong of 5,000 people in 31 countries and a market cap of \$4.2 billion (achieving unicorn status in terms of stock market value in only their second full year) and 2020 revenues of £342.7 million. The firm combines MediaMonks, the creative digital content production company and MightyHive, a leading digital media solutions provider. Recent business wins include Google, Facebook, Amazon, Netflix, Procter & Gamble, T-Mobile, Bayer, HP, Cisco, Embibe, Harley Davidson, PayPal, LA28, Shopify, and Verizon, among others.

- **We Believers ([www.webelievers.com](http://www.webelievers.com))** is a small, independent and award-winning (the most awarded independent agency in Latin America and in the US Hispanic market) agency with offices in NY, Miami, Mexico, and Buenos Aires. It ranked #10 in the Ad Age's 2021 A-List & Creativity Award. The agency is known to "win clients with extraordinary ideas and commitments," also called "creative activism," which aims to go beyond selling. The agency recently landed global AOR duties for Barilla's Wasa brand. Other clients include Volvo, Burger King, Pepsi, Nestle, Avon, DoorDash, Aaron's, Netflix, and Patagonia.
- **Rethink (<https://rethinkcanada.com>)** is an independent creative agency with offices in Vancouver, BC, Toronto, and Montreal, known for its breakout ideas. It is also Canada's largest national, owner-operated, independent creative agency. Rethink has been named The Effies 2020 North American Independent Agency of the Year and Ad Age 2021 Creative Agency of the Year. Since 2018, it has been part of the ICOM network of independent agencies. Clients include Ikea, WestJet, Molson, Heinz, Scotts, and YWCA.

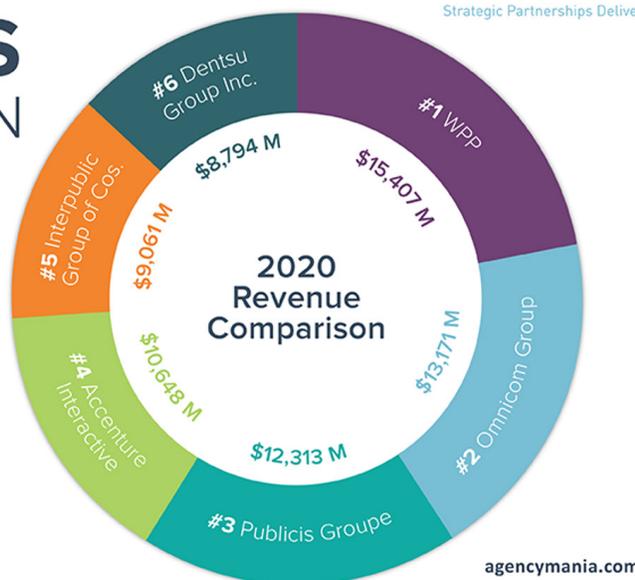
Did you miss our yearly Top Agency Poster, recounting the world's largest 15 agencies by revenue? Download the immediate electronic poster [here](#) or request our individual agency holding company breakouts by emailing [info@agencymaniasolutions.com](mailto:info@agencymaniasolutions.com).



2021

# TOP 6 AGENCIES REVENUE COMPARISON

Top 15 Agencies	2020 % year-over-year	2019 % year-over-year
1. WPP	- 9.0%	- 18.76%
2. Omnicom Group	- 12%	- 2.0%
3. Publicis Groupe	- .06%	+ 4.92%
4. Accenture Interactive	+ 3.0%	+ 21.09%
5. Interpublic Group of Cos.	- 11%	+ 5.21%
6. Dentsu Group Inc.	- 8.0%	+ 4.10%



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



Environmental, social, and governmental (ESG) work related to climate change, racial equity, privacy, and responsible marketing is on the rise with agencies developing capabilities to support it. Many brands made bold commitments and set aggressive targets. Agencies, too, made their own pledges. Did COVID-19 raise our level of corporate consciousness to new heights? Or are companies simply responding to growing consumer demands for accountability and social responsibility? The Olympic Games in Tokyo are capturing much of our attention as nothing is like it used to be. Advertisers are adjusting quickly. Connected TV, streamlining content, advanced programmatic tools, and new forms of advertising are gaining momentum. In the meantime, Ad Age and the Cannes Lions celebrate superb work, innovation, and ingenuity. A gentle reminder that creativity is still king in the advertising kingdom.

- Per Ad Age, the **top 20 2021 brands** (aka America's Hottest brands) were: Bad Bunny, Clubhouse, Cookies, #CultureTags, Dick's Sporting Goods, Dolly Parton, DraftKings, Figs, Prince Harry And Meghan Markle, The Home Edit, Liquid Death, Marvel, NFTs, NTWRK, Pattern, Pfizer, Pink Stuff, Reddit, Roblox, and Space Jam.
- Per R3 Worldwide, **net new US agency business revenue** doubled from January to May of 2021, to \$544 million, with the number of reviews up 60% to 309. Globally, net new business revenue rose 47% (\$1.3 billion) led by Publicis Media, for a total of 2,941 reviews (up 43%). Code and Theory, VMLY&R, and BBDO were top ranked US creative agencies.
- The **ANA Media Leadership Growth Council** identified 39 KPIs. The most used KPIs are primarily efficiency and exposure counting, and include (by descending order): CPM (cost per thousand), CPC (cost per click or interaction), Unique Reach, ROI/ROAS Based on Spending or Lift, followed by Site Visits and Viewable Impressions. The most important one is considered to be ROI/ROAS Based on Spending or Lift. New KPIs include Data Source Quality.
- On **Last Week Tonight with John Oliver (HBO)**, John Oliver picked on "Sponsored Content" and the need for greater integrity. To make a point, his team created a fake product (the Venus Veil, the world's first sexual wellness blanket), a website ([www.venusinventions.com](http://www.venusinventions.com)) and promoted it on local TV news.
- PepsiCo, Nestlé, General Mills, Dole, and others use an AI-driven tool called **Tastewise**, which deploys algorithms to uncover what people are eating and why, based on massive quantities of food data online (95+ million menu items, 226 billion recipe interactions, and 22.5 billion social posts, etc.).
- The ANA launched its **Creative Feedback Playbook** in partnership with Agency Mania Solutions, covering every facet of the client creative feedback process. A checklist is available for download for non-members.
- **Publicis Media's Starcom London** launched the first automated media booking bot, dubbed ABACUS for "automated bot for amendments to campaigns and uploads," from a UK agency. It utilizes intelligent automation known as robotic process automation to ensure media buys run as scheduled and according to plan.

- Per Jay Salyers, SVP of Miles Partnership, there are **6 ways to automate an agency:**
  - 1) Define goals
  - 2) Go big on unifying
  - 3) Synchronize automation with AI
  - 4) Omnichannel buying
  - 5) Team collaboration
  - 6) Comprehensive reporting
- Per Adobe, **5 things to prepare for a cookie-less future:**
  - 1) Orient your team around the facts and overarching trends
  - 2) Audit your technology and make changes
  - 3) Own the customer relationship
  - 4) Create innovative experiences to reduce the friction around first-party data collection
  - 5) Hold your paid media accountable to what matters
- The **NFL** produced a new inspiring film "Football is for Everyone" in partnership with The Trevor Project and LA-based agency 72andSunny, redefining the game to be inclusive of all different types of fans, coaches, and players.
- Food chain giant **Wendy's** and its social media team created an ad within a seven-hour window based on a young fan's idea, reacting quickly after Julien Jantos' mom tweeted his crayon-drawn storyboard for a Wendy's commercial called "The Burger."

### Awards

- **AdAge's 2021 A-List & Creativity Award winners:** Agency of the year went to Droga5 (Accenture Interactive), followed by Work & Co, Wieden+Kennedy, Deutsch LA, Cartwright, Goodby, Silverstein & Partners, Gut, Martin Agency, VMLY&R, and We Believers. **Agency standouts were:** Barkley, Camp + King, Cashmere, Empower, FIG, Highdive, Johannes Leonardo, McKinney, MediaMonks, Mojo Supermarket, Preacher, TBWA, 22Squared, VaynerMedia, and YML. **Media Agency of the Year:** Initiative. **In-House Agency of the Year:** Frito-Lay. **Creative Agency of the Year:** Rethink. **International Agency of the Year:** Mother London. **Data/Analytics Agency of the Year:** GALE. **Multicultural Agency of the Year:** NIMBUS
- **AMV BBDO, London** won the Cannes Lions Agency of the Year title with its "Womb Stories" campaign. **Wieden+Kennedy Portland** won the Cannes Lions Independent Agency of the Year title.
- **WPP** won the Cannes Lions Holding Company of the Year title. WPP agencies collected a total of 190 Lions, including a Titanium Lion, 12 Grand Prix, 28 Gold, 57 Silver and 92 Bronze, with winners representing 38 different countries.
- **WPP Ogilvy** was the standout performer, with eight Grand Prix and a Titanium Lion for work including Stevenage Challenge (DAVID) and Moldy Whopper (DAVID and INGO) for Burger King; Courage is Beautiful for Dove; and Naming the Invisible by Digital Birth Registration for Telenor Pakistan. The agency also won Mobile and Brand Experience & Activation.
- **Omnicom** is the only holding company with three creative networks placing in the Top 10 at Cannes Lions Live 2021. **Omnicom Media Group** won the Cannes Lions Media Group of the Year title, with PHD and OMD sweeping the media network category, placing #1 and #2. AMV BBDO won Agency of the Festival with five Grand Prix, including a Titanium.

- **Interpublic Group's FCB** won the Cannes Lions Network of the Year title for its first time, winning a total of 80 Lions, including two Titanium, five Grand Prix, 15 Gold, 26 Silver, and 32 Bronze.
  - **Other key Cannes Lions wins:** Wieden+Kennedy Portland won the Grand Prix in Creative Effectiveness for its Nike work, Crazy Dreams. Marcel Paris and Carrefour won the Grand Prix in creative business transformation for Act for Food. Telenor and Ogilvy won the mobile Grand Prix for their "Naming the Invisible by Digital Birth Registration" work. AB InBev's Tienda Cerca and LinkedIn project won Creative eCommerce Grand Prix. Unilever's Degree Inclusive won Innovation Grand Prix, a product spurred by Wunderman Thompson for people with disabilities.
  - **MDC Partners** agencies won 18 Lions, including 72andSunny (LA)'s Entertainment Grand Prix with Tinder. MDC agencies also had a strong showing this year at Ad Age's 2021 A-List & Creativity Award: GALE (Data & Analytics Agency of the Year), YML (Agency Standout of the Year), and 72andSunny (2021 Agency to Watch).
  - **Apple** won the Best of the Best award in the 2021 Brand Film Awards US for its "Hometown—Shot on iPhone by Phillip Youmans" spot created by TBWA\Media Arts Lab with Smuggler and OMD.
- » "Rather than just being hands on keyboards, there is an extraordinary opportunity for agencies to reemerge as their clients' heroes by offering creative plans with an optimal connection between advertising and context."—Doug Stevenson, CEO and Co-founder, **Quintesse/Vibrant Media**
  - » "We actually estimate that by 2025, 30% to 50% of the large brands will have in-housed their ecommerce operations."—Virginie Douin, Partner, **You and Mr. Jones**
  - » "As marketers grapple with a post-pandemic future, agility is shaping up to be the most powerful attribute for successful brands and organizations."—Katie Nykanen, Chief Product Officer, **Extreme Reach**
  - » "Being creatively brave means pushing the work and advocating for a strong POV with clients."—Bill Afonso, CFO, **Johannes Leonardo**
  - » "As a small independent agency, we don't have to pay margins or answer to a massive holding company with a name that sounds like it was pulled from a Kubrick movie."—Greg Hahn, Co-founder and CCP, **Mischief USA**
  - » "Good ideas can happen anytime and anywhere through any medium."—Kathleen Hall, Chief Brand Officer, Global CVP of Brand, Advertising and Research, **Microsoft**
  - » "The case for involving production and delivery strategy upfront in the creative process is no longer just about feasibility-checking, but to help shape creative ideas."—Nicky Russell, **White Door**
  - » "We must be more like meteorologists; to be better not only at predicting culture, but also at knowing how and when we must adapt and understand when it could ruin our plans if not interpreted correctly."—Craig Elimeliah, Executive Creative Director, **VMLY&R**
  - » "I have always said to clients, if there's an emergency that can't wait until first thing the next morning, don't contact the team—call me."—Neil Christie, former Director Growth Markets, **Wieden+Kennedy**
  - » "Brand safety is becoming foundationally important."—Bob Liodice, CEO, **Association of National Advertisers**

### Noteworthy quotes:

- » "If you look at climate change, racial equity, privacy, responsible marketing, we're really at the nexus of many of these issues—as are our clients."—Mark Read, CEO, **WPP**
- » "Great creative has always leaned on truth and shared experience. Right now, there is more of that than ever."—Lorraine Twohill, CMO, **Google**
- » "Choose to make equality the systemic way of bringing creativity to life."—Marc Pritchard, Chief Brand Officer, **P&G**
- » "Another lesson we've learned is that every brand is—or has to be—a wellness brand, whether that wellness is physical, emotional, mental, financial, societal, cultural, global, etc."—Suzanne Powers, Global President and Global Chief Strategy Officer, **McCann Worldgroup**

## WHITE PAPER: 2021 Production Content Creation Trends & Predictions

Contributed by: Advertising Production Resources

This paper analyzes the major transformations experienced by the advertising production industry during the pandemic in 2020 and defines how content creation will be influenced in the years to come. This year's trends are influenced by the increased demand for more content, innovations in content creation (specifically tailored for ecommerce), and the shift toward centralized marketing operations. Highlights include the need for more robust digital asset management (DAM) systems, efficient processes to source and onboard fit-for-purpose production partners, and the increasingly vital role of data taxonomy and governance in a modern content creation ecosystem.

The primary theme around these trends is that marketers must "challenge everything" they know about traditional content creation in order to stay ahead of the curve and optimize their production efforts for the future. APR's Founder and CEO, Jillian Gibbs, says, "2020 gave us an opportunity to evolve as an industry—which is a good thing, because I don't believe that the traditional production model was serving the needs of today's marketers."

For the full white paper, please visit: <https://hubs.ly/H0QK3n70>

## FINANCIALS: Driving efficient use of resources



The global advertising market is expected to grow double digits this year and next. All major media firms—dentsu, GroupM, Magna, Zenith—are predicting it. The big winner is digital, the fastest growing segment of the advertising market. Holding companies are also catching their breath with positive Q2 results in terms of revenue, organic growth, and net profit, due to the recovery from the COVID-19 pandemic. As dollars are shifting to ecommerce-related activities, major firms are strengthening their offering by making strategic acquisitions in areas like connected TV ad delivery and measurement, digital OOH network, digital ad serving, and data management.

- Per the Kantar BrandZ™ **Top 100 Most Valuable Global Brands 2021**, value was up 42% in 2021 (+\$2 trillion), compared to 6% in 2020. Total brand value of the Top 100 reached \$7.1 trillion, equivalent to the combined GDP of France and Germany. Tesla is the fastest growing brand, increasing by 275% to a brand value of \$43 billion. There were newcomers including Nvidia (no.12, \$105 billion), Zoom (no.52, \$37 billion), AMD (no.57, \$33 billion), and Spotify (no.99, \$19 billion). With a 64% increase, Amazon secured its third consecutive year at the top of the ranking (with a total brand value of \$684 billion). For the first time, two brands are worth over half a trillion dollars—Amazon and Apple (no.2, \$612 billion).
- Per GroupM, in 2020 the world's largest CPG manufacturers grew their **ecommerce revenues** by 57% YOY. Global ecommerce sales will grow 20% during 2021, to \$5.2 trillion, then 19% in 2022, to \$6.2 trillion.
- Per GroupM, **US media ad revenue** is expected to grow 22% in 2021 or \$279 billion of total media company ad revenue, growing to \$388 billion by 2026. Digital advertising revenue will increase 33% in 2021 (vs. 10% last year).
- GroupM's **worldwide media ad revenue** is expected to grow 17.3% in 2021 and 9.7% in 2022. The consensus (average of their own individual projections) between dentsu, GroupM, Magna, and Zenith is that worldwide ad revenue will increase 10.6% in 2021 and 8.2% in 2022.
- Per dentsu, the **global advertising market** is to reach \$634 billion this year, up 10.4% YOY. The US, Canada, and Australia will see the highest growth. Digital media is to grow 15.6% and reach \$311 billion. Other: cinema (35.1%), social (23%), video (17%), out-of-home (14.6%), radio (10.4%), and TV (7.1%).
- Per GroupM, 12 advertisers, with \$100 million+ spend who have filed to become publicly listed or begun trading as public companies since December 2020, say that 26.8% is the **median share of revenue allocated to advertising**.
- Per BMO Capital Markets, **Connected TV (CTV)** ad spending in the US is projected to reach \$21 billion in 2021 and grow at an annual rate of about 23% through 2030, reaching \$100 billion.
- Per eMarketer, the **US TV upfront** market rose 7.6% to reach \$19.9 billion for the 2021-2022 TV season. For the 2022-2023 season, it's estimated to rise 3.3%, reaching \$20.5 billion. Per Media Dynamics, there was a total of \$2.9 billion in canceled upfront commitments due to COVID-19.
- **Digital** is the fastest-growing segment of the advertising market. Per S4 Capital, digital accounted for over 50% (for the first time), or \$290 billion of total global advertising spend in 2020, and will grow to 66% by 2024, accelerated by the impact of COVID-19.
- Per MoffettNathanson, **cord-cutting accelerated** with cable and satellite TV companies losing six million subscribing households, a decline of 7.3% in 2020, as a result of the rise of streaming services.
- Per GroupM, the **top 25 media suppliers** control two-thirds of all ad spending (or 66.6% of global advertising spend, up from 42.1% in 2016). The top five pulled in \$295.5 billion in 2020, 46% of the total \$641.2 billion ad spend. China's media companies account for 20% of the advertising revenues from the top 25 media companies in the world.
- **APR** launched their proprietary production data collection and analysis tool, ACERO™, which empowers clients to Analyze, Collect, Evaluate, Report, and Optimize spend and savings across their entire content creation ecosystem.
- **Omnicom Media Group** sold its media barter operation Icon International, which specializes in trading corporate assets for advertising and paid media, to Icon's management team.

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

- **Innovid**, global leader in connected TV ad delivery and measurement, announced it's going public via a merger with ON Acquisition Corp. 2 Ltd. (NYSE: IACB), the transaction implying a valuation of \$1.3 billion.
- **Accenture** acquired NY-based business consultant Bionic, which is composed of designers, strategists, technologists, entrepreneurs, and venture investors, to enhance Accenture Interactive's existing growth-building capabilities.
- Google-backed San Francisco-based digital out-of-home (DOOH) firm **Firefly** acquired Curb Taxi Media, one of the nation's largest taxi advertising platforms, expanding its network utilizing taxi and rideshare vehicles. Existing clients include United Airlines, Puma, Papa John's, and Colgate.
- **Publicis Group** acquired retail media platform CitrusAd, a SaaS platform that optimizes advertising for brands directly within retailer websites. Australian-based CitrusAd and its 130 engineers and retail media experts will operate as a freestanding business within its Epsilon division.
- Media-buying processing system provider **Mediaocean** acquired Flashtalking, an innovative independent digital ad server provider for omnichannel advertising with emphasis on cross-channel video and dynamic creative. The combined entity will focus on ad serving, creative personalization, identity management, and verification with over \$200 billion in annualized media spend and over one trillion monthly ad impressions.
- Rochester NY-based agency **Butler/Till** acquired digital marketing shop Digital Hyve to expand into new verticals, including retail, auto, food/beverage, government, travel, tourism, and hospitality. Digital Hyve will retain its name.

- **MNTN** acquired Ryan Reynolds-owned shop Maximum Effort Marketing (with clients like Match.com and Mint Mobile). Maximum Effort Marketing will continue to operate as a creative agency within MNTN and retain its name. Ryan Reynolds is now chief creative officer of MNTN.
- New York-based marketing agency **Allied Global Marketing** acquired Dublin-based experiential marketing agency Honey+Buzz (with clients such as Heineken, Renault, Dropbox, and Coca-Cola) to expand its global footprint.
- Columbus, Ohio-based **Geben Communications** acquired Women Online, a boutique content and influencer marketing agency specializing in national social impact and nonprofits, and the curator of The Mission List, a remarkable influencer network of 2,400+ highly coveted opinion-shapers.

#### Holding companies' financial results:

- **Omnicom Group Inc. (NYSE: OMC)** worldwide revenue increased 27.5% to \$3,571.6 million in Q2 due to the recovery from the COVID-19 pandemic. Net income was \$348.2 million as compared to a net loss of \$24.2 million last year. Organic growth was up: 29.8% for Advertising, 25.0% for CRM Precision Marketing, 15.2% for CRM Commerce and Brand Consulting, 53.0% for CRM Experiential, 22.7% for CRM Execution & Support, 15.1% for Public Relations, and 4.5% for healthcare.

#### Noteworthy quotes:

- » “I believe the combination of our companies (MNTN and Maximum Effort Marketing) will create a 1+1 equals 3 situation, assuming my math checks out. It was never my strong suit.”—Ryan Reynolds, Actor and Chief Creative Officer, **MNTN**

- » “Sadly, and without intent, agencies and their clients have seen their partnerships slip away to become vendorships, with relationships bought and sold on price.”—Michael Farmer, Chairman and CEO, **Farmer & Company LLC**
- » “Our mantra is ‘trust but verify.’ Shouldn’t take long to inspect a tightly-run ship, should it?”—Erika Blomerus, Global Audit Manager, **Financial Progression**
- » “We champion a single-point-lead model, which means we create a centralized and strategic approach where our agency acts as the lead, while ensuring integration throughout partner agencies, including with in-house teams.”—Bill Afonso, CFO, **Johannes Leonardo**
- » “Rehearse pitches, resolve outstanding issues, and be relatable. Otherwise, throw the relationship in the dumpster.”—Dana Small, Senior Category Manager, Global Strategic Sourcing, **BioMarin Pharmaceutical**
- » “When the pressure is on, large agencies can throw large agency numbers at the problem, or in many cases, at a pitch. What it lacks in efficiency it makes up for in sleep.”—Greg Hahn, Co-founder and CCP, **Mischief USA**
- » “Agencies and their clients need to escape the commodity trap they created for themselves.”—Michael Farmer, Chairman and CEO, **Farmer & Company LLC**
- » “Advertising spending will inevitably go higher than would be true if inflation were lower, as marketers are generating more revenue in nominal terms.”—Brian Wieser, Global President, **Business Intelligence, GroupM**

Read our [new article](#) recapping the notable sessions and speakers at the ANA's recent in-person Advertising Financial Management conference. As in-person attendees, we share the energy and momentum felt and the success of what that could mean for future events.

NEW ARTICLE

# Back to a Future... Where Relationships Matter

What did we learn from the recent ANA Agency  
Financial Management conference?





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**KEY INTERNATIONAL MEDIA PITCH CONSULTANTS & MEDIA AUDITORS**

Based on our analysis of over 150+ global & multi-market media reviews since 2018, the list below reflects the pitch consultants and media auditors most often hired by multinational advertisers. From our experience and research, the number of offices or employees / size of the company is not necessarily a top selection criteria. The experience of the team and quality of service delivered is the most desirable consideration.



[auditstar.co.uk](http://auditstar.co.uk)

✉ **Caroline Lane, Managing Director** | caroline.lane@auditstar.co.uk

**Main services** Media Efficiency Audits | Performance Tracking Dashboards | Cost & Quality Benchmarking and KPI setting | Digital Management Optimisation | Modelling and ROI | Media Pitch Management | Contracts and Compensation | Fee Benchmarking | Agency Performance Evaluation | Invoice Checking | Reporting and Data Access | Financial Process and Controls | AVBs and Rebates

**Key clients** Clients across 12 categories (Automotive, Banking & Insurance, Beverages, Confectionary, Energy, Food, Government & Public Services, Health, Household Products, Personal Care Retail, Telecoms, Travel & Tourism). References available on application.



[ebiquity.com](http://ebiquity.com)

✉ **Nick Waters, CEO** | nick.waters@ebiquity.com

✉ **Laetitia Zinetti, MD Europe** | laetitia.zinetti@ebiquity.com

✉ **Priya Thakoribhai Patel, media management manager** | Priya.t.patel@ebiquity.com

**Main services** Media management: Agency management and selection, process review, KPI setting and remuneration models, process governance and operating models, training | Media Performance: Media benchmark, media performance tracking, digital source data monitoring, digital review | Marketing Effectiveness: market mix modelling, price and promotions, brand equity | Technology advisory | Contract compliance (Firm Decisions)

**Key clients** More than 70 of the Top 100 advertisers today choose Ebiquity as their trusted independent media advisor



[ecimm.com](http://ecimm.com)

✉ **Joakim Attack, Chief Commercial Officer and Partner** | joakim.attack@ecimm.com

**Main services** Media Performance Auditing | Media Pitch Management | Financial Compliance Audit

**Key clients** list available upon client request



[medialink.com](http://medialink.com)

**Donna Sharp** | donna@medialink.com

**Main services** Media + Creative Agency Partnership Assessment | Global Media + Creative Agency Reviews | Design of In-House Agencies (Media + Creative) | Agency Renegotiation/Therapy | Agency Contract Optimization

**Key clients** Disney, ABI, Unilever, Walmart, American Express, Eli Lilly, HPE, Nissan, WW, Gap, Walgreens Boots Alliance, NBA, MGA, Mattel, AT&T, Planet Fitness, MGM, AllState, Intuit, L'Oreal, YETI



[cortexmedia.com](http://cortexmedia.com)

✉ **Manuel Reyes** | mreyes@cortexmedia.com

**Main services** Agency Pitch Management & Consulting | Media Performance Audits | Financial Compliance Audits | Contracts & Compensation Support

**Key clients** Visa, Hershey, UHG, Warner Media, L'Oreal, Disney



[media-path.com](http://media-path.com)

✉ **Susanne Elias, Founder** | susanne.elias@media-path.com

✉ **Andrew Challier, CEO / UK** | andrew.challier@media-path.com

**Main services** Media Agency Pitch Management | Media Cost Management, Benchmarking and Insights | Media Governance | Media Strategy Consultancy | Media Financial Compliance

**Key clients** AB-InBev, Disney, Kraft Heinz, IKEA, H&M, Heineken, Pandora, Sky, Beiersdorf, JPMC, BSH



[idcomms.com](http://idcomms.com)

✉ **Europe: David Indo** | david@idcomms.com

✉ **North America: PJ Leary** | pj.leary@idcomms.com

**Main services** Diagnostic of Media Operations | Operating Model Design | Agency Pitches | Scope, Fee and Contract negotiations | Programmatic Media Assessment | Agency Performance Benchmarking | Media Auditing

**Key clients** T-Mobile, Hershey's, LVMH, Facebook, IKEA, Heineken, Klarna, Burberry, ING, Lindt, Duracell, Electronic Arts, Puma, TIAA, Colgate Palmolive, SAP, Sephora, Shiseido, Danone, Mars, Estée Lauder



[pwc.co.uk/services/risk/marketing-media](http://pwc.co.uk/services/risk/marketing-media)

✉ **Sam Tomlinson, PwC's media assurance practice Lead** | sam.tomlinson@pwc.com

**Main services** Media assurance (media audits) | Contract negotiation | Pitch support and related services

**Key clients** Confidential; includes top 10 global advertisers



[media-sense.com](http://media-sense.com)

**Graham Brown Director, Co-founder** | graham.brown@media-sense.com

**Andy Pearch Director, Co-founder** | andy.pearch@media-sense.com

**Main services** Models (media operating model advisory) | Partners (end-to-end pitch management) | Analytics (media auditing & performance management)

**Key clients** JET, Adidas, Dyson, Sanofi, Coca Cola, Liberty Global, Lloyds Banking Group, Bayer, Perrigo, BGL Group, Crown Commercial Services



[www.rthree.com](http://www.rthree.com)

✉ **Greg Paull** | Greg@r3ww.com

**Main services** Return on Agencies - Pitch Management, Financial Analysis, Agency Model, Agency Evaluation | Return on Media - Media Audit, Media Strategy Benchmarking, Programmatic Audit, Search Audit, Compliance Audit | Return on Investment - Digital Ecosystem Benchmarking, eCommerce Benchmarking

**Key clients** Samsung, Reckitt's, Philips, P&G, Unilever, Colgate, Novartis, Sony, MolsonCoors, NovoNordisk, Shell, BMW, Mercedes, Mastercard, Nike

**A FEW OTHER INTERNATIONAL MEDIA PITCH CONSULTANTS & MEDIA AUDITORS**



✉ **Philippe Dominois, Co-Founder and CEO** | Philippe.Dominois@abintus.consulting

✉ **Tatjana Slykova, Co-Founder and COO** | Tatjana.Slykova@abintus.consulting

**Main services:** Media Agency Pitch Support (27%) | Media Management Training (26%) | Media Auditing (22%) | Media Consultancy (13%) | Media Performance Tracking (12%)

**Key clients:** Pernod Ricard, Kao, Betway, Stage Entertainment



✉ **Rouven Dankert, CEO** | rouven.dankert@mediaguides.com

**Main services:** Deep Dive Audits & Trackings: 60% | Media Consultancy: 20% | Pitch Management: 20%

**Key clients:** Aldi, Allianz, Arla, Deichmann, Delta Pronatura, Deutsche Telekom, Dr. Oetker, Eurowings, Edeka, HUK, Intersnack



✉ **Rafal Szysz, CEO** | rafal.szysz@stars.com.pl

**Main services:** Auditing/benchmarking/tracking accounts (70%) | Media Pitch consultancy (30%) | 60% revenues from local services and 40% from international (foreign markets).

**Key clients:** Deutsche Telekom, Lidl, L'Oreal, Beiersdorf, Asahi, Allegro, Peppo, VW Group

COMvergence works closely with these and other pitch consultants (most being subscribers of COMvergence products & services for several years). Should you require further information or have questions about the above, please contact us.

COMvergence is an independent and international research consultancy providing analysis and benchmarking studies of the advertising and media firms owned by the global holding companies, leading independent agencies, and management & IT consulting firms. Using quantitative and qualitative measurement metrics, COMvergence provides high-quality reference data, guidance and support for MarCom professionals across all levels and titles. COMvergence partners include the American Association of Advertising Agencies (4A's), World Federation of Advertisers (WFA), Nielsen and Kantar, among others.

[www.comvergence.net](http://www.comvergence.net)

✉ **Olivier Gauthier, Founder & CEO:** Olivier.Gauthier@comvergence.net  
✉ **Lisa Spielman, US Director:** Lisa.Spielman@comvergence.net

[in](#) COMvergence worldwide

**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.

- Home furnishings retailer **Ashley HomeStore** selected Kettle, part of Stagwell's Code and Theory, as its lead creative agency. The agency will collaborate with media AOR, Empower.
- **American Family Insurance** and sibling auto insurance provider The General selected Publicis Groupe as its media AOR. The custom unit led by Chicago-based performance marketing agency Performics will handle its US digital and traditional media strategy, planning, and buying account.
- Pharmaceutical giant **Bayer** kicked off a global media review. WPP's MediaCom (US) and Omnicom's PHD (Global) are incumbents and defending. The brand also uses an in-house media buying team focused on programmatic media buying in the US.
- Berkshire Hathaway subsidiary's **Brooks Running** selected Cincinnati-based independent full-service creative solutions agency Curiosity as its social media AOR, following a review.
- Cryptocurrency exchange operator **Coinbase** selected WPP GroupM's Wavemaker as its media AOR, following a review. The agency will handle planning, buying and activation of media, sponsorships, and content. The brand recently hired The Martin Agency as its creative AOR.
- Health insurance giant **Cigna** consolidated most of its marketing services account—including creative, B2B, digital, media planning and buying, marketing communications, and data and analytics among other services—with the Interpublic Group IPG, which created a bespoke cross-holding company team, "Team Unleash," comprised of resources from McCann Worldgroup, R/GA, Initiative, Acxiom, Kinesso, and others.
- Healthcare and pharmacy giant **CVS Health** kicked off a review of its integrated account (includes creative, branding, data, and CRM) in the US, except for media, which was consolidated under IPG's UM in 2019.
- Smoothies and sweet gifts firm **Edible** selected Knoxville-based Tombras as its creative and media AOR, following a review and replacing project-based agency relationships. The agency will handle broadcast, OTT, and digital advertising.
- Pharmaceutical giant **Eli Lilly** kicked off a review of its \$600-\$800 million global media account. Incumbent Omnicom OMD has held the account since 2002. The selected agency is expected to partner with the brand's creative agencies—WPP's Grey and health care marketing agency GSW.
- Discount platform and experiences marketplace **Groupon** selected Interpublic Group's FCB (Foote, Cone & Belding) as lead creative AOR, following a review and replacing incumbent TBWA\Chiat\Day New York. The agency will evolve the brand's consumer and merchant brand perceptions. The agency was named Adweek's 2020 Global Agency of the Year.
- Deckers Brands' performance footwear and apparel brand **HOKA One One** selected FCB West (San Francisco) as its first-ever global creative AOR, following a review.
- Wells Enterprise's frozen dessert brand **Halo Top** selected Fact & Fiction as its social media AOR following a review. The agency will handle social strategy, creative, content production, community management, analytics, and other duties.
- Fast-food chain **Jack In The Box** selected a Generation Z Media content company Kyra Media as its AOR for TikTok campaigns. The agency which "harnesses the power of talent to create engaging digital content" signs the most exciting and influential creators in the world into the Kyra network (133 million social audience across 190 countries) and works with them to produce distributed content and original programming across digital channels.
- **Las Vegas Convention and Visitors Authority (LVCVA)** selected R&R Partners as its full-service agency AOR for another two years, following a review and maintaining its existing 40-year relationship with the agency. WPP's Grey was also selected to handle social media. R&R is behind the iconic tagline since 2003, "What Happens Here, Stays Here." R&R Partners is part of Worldwide Partners Inc. (WPI), a global network of owner-led marketing services agencies.
- **Lululemon's Mirror**, the interactive home fitness brand Lululemon acquired last year, selected NY-based KNOWN as its first AOR, following a review. The agency will handle growth strategies, creative branding, and media planning and buying.
- American brand of hair care and hair color products firm **Madison Reed** selected dentsu X (powered by 360i) as its media AOR. The agency will handle paid social, search, programmatic, OOH, affiliate, and broadcast buying.
- **NatWest Group** selected the Interpublic media agency Initiative as its media planning and buying AOR, following a review. The agency will handle all the group's brands including RBS, NatWest, Coutts, and Ulster Bank.
- Chicago-based sandwich shop chain, **Potbelly Corp.**, selected independent full-service agency USIM as its media AOR. The agency will handle planning and strategy, digital marketing, and analytics. Other clients include In-N-Out Burger and Buffalo Wild Wings.
- Financial brand **Prudential** selected independent StrawberryFrog NY as its creative AOR, following a review. The brand previously worked with Accenture Interactive's Droga5 and developed its own advertising in-house in recent years.

- Global health technology company **Philips** consolidated its \$300 million integrated account with Omnicom for global creative, media, and communication duties, following a review and replacing incumbents dentsu, WPP (WPP's Ogilvy held the creative account since 2011), and Havas. Omnicom built a bespoke team led by TBWA for creative, OMD for media, and FleishmanHillard and Ketchum for communications, and with resources from Interbrand, Critical Mass, and Omnicom Precision Marketing Group.
- **Red Bull** selected Omnicom Media Group's PHD as its new media AOR for North America, replacing incumbent since 2018 Publicis Media's Starcom USA.
- Beauty marketer **Sally Beauty** selected Publicis Media's Spark Foundry unit as its media AOR, following a review. The agency will handle media planning and buying, analytics, search, social, video, content, display, and affiliate marketing.
- Ticketing platform **SeatGeek**, the web's largest event ticket search engine, selected NY-based integrated media and creative agency FIG as its first time AOR, following a review.
- Online-photo service company **Shutterfly** selected Mischief @ No Fixed Address as its AOR, following a review. The agency will collaborate with Shutterfly's 60-person in-house marketing team, which handles day-to-day operations such as social media and influencer partnerships.
- **WaterWipes** selected Omnicom as its global integrated AOR, replacing incumbent IPG. Creative will be led by BBDO LA, media buying by Omnicom Media Group, PR and reputation management by OPRG, and digital and physical retail by Velocity Commerce Group.



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## Agency roster summary

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Ashley HomeStore	Unknown	Lead Creative Agency	Unknown	Kettle	Yes
	American Family Insurance (and sibling insurance provider The General)	Unknown	Media AOR	US	Publicis Groupe	Unknown
	Bayer	Defending: MediaCom (US) and PHD (Global)	Media	Global	[Review in Process]	Yes
	Berkshire Hathaway (Brooks Running)	Unknown	Social Media AOR	Unknown	Curiosity	Yes
	Coinbase	Unknown	Media AOR	Unknown	Wavemaker (GroupM)	Yes
	Cigna	Unknown	Marketing Services Category	US	Team Unleash (IPG)	Unknown
	CVS Health	Unknown	Integrated account (includes creative, branding, data, CRM, etc.)	US	[Review in Process]	Yes
	Edible	Replacing project-based agency relationships	Creative and Media AOR	US	Tombras	Yes
	Eli Lilly	Defending: OMD (Omnicom)	Media	Global	[Review in Process]	Yes
	Groupon	TBWA\Chiat\Day New York	Lead Creative AOR	Global	Foote, Cone & Belding (FCB) (IPG)	Yes
	Wells Enterprise (Halo Top)	Unknown	Social Media AOR	Unknown	Fact & Fiction	Yes
	HOKA One One	None	Creative AOR	Global	Foote, Cone & Belding (FCB) (IPG)	Yes
	Jack In The Box	Unknown	AOR for TikTok Campaigns	US	Kyra Media (Generation Z Media)	Unknown
	Las Vegas Convention and Visitors Authority (LVCVA)	R&R Partners	Full-Service Agency AOR	US	R&R Partners (WPI)	Yes
	Las Vegas Convention and Visitors Authority (LVCVA)	Unknown	Social Media AOR	US	Grey (WPP)	Yes
	Lululemon (Mirror)	None	AOR	Unknown	KNOWN	Yes
	Madison Reed	Unknown	Media AOR	Unknown	dentsu X (Powered by 360i)	Unknown
	NatWest Group	Zenith	Media Planning and Buying AOR	Unknown	Initiative (IPG)	Yes
	Potbelly Corp	Unknown	Media AOR	Unknown	USIM	Unknown
	Prudential	Droga5 (Accenture Interactive)	Creative AOR	Unknown	StrawberryFrog NY	Yes
	Philips	Dentsu, WPP, and Havas	Consolidated Creative, Media, and Communication	Global	Omnicom (Bespoke Team)	Yes
	Red Bull	Starcom (Publicis)	Media AOR	North America	PHD (Omnicom)	Unknown
	Sally Beauty	Unknown	Media AOR	US, Canada	Spark Foundry (Publicis)	Yes
	SeatGeek	None	AOR	Unknown	FIG	Yes
	Shutterfly	Unknown	AOR	Unknown	Mischief @ No Fixed Address	Yes
	WaterWipes	IPG	AOR (Creative, Media Buying, PR, Digital and Physical Retail)	Global	Omnicom (BBDO LA, Media Group, OPRG, Velocity Commerce Group)	Unknown