

Industry Update

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

August 2021 | Volume 57



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Securing the right talent and resources

Specialty talent is on the rise, and for this particular update I chose two esports and gaming-endemic agencies—Damage (in LA) and Paper Crowns (In NY)—specialized in the fast-growing esports category with a unique and differentiated... [continued on pg. 2](#)

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Driving better work, stronger performance, and value from the partnership

We are seeing the signs of an “asynchronous recovery,” as some people call it. It’s apparent in the work being produced and in countless awards being won... [continued on pg. 7](#)

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Driving efficient use of resources

Brands are reinvesting in marketing, particularly in digital media, ecommerce, and marketing technology. As client confidence returned and spend increased, holding companies are emerging from the pandemic with strong... [continued on pg. 12](#)

AGENCY



Agency reviews and roster changes

AmeriSave Mortgage Corporation selected Havas Group’s Arnold as its creative AOR, without a review, replacing incumbent The Martin Agency, which the brand worked with on a project basis. The decision followed the hire of a new CMO... [continued on pg. 16](#)

EXECUTIVE SUMMARY: Monthly recap

The word of this year might be “Unprecedented,” as we face new and widely unexpected developments in the economy, climate, international and domestic political realm, and our industry.

The Tokyo Olympics was off to a disappointing start with a 36% decline in prime-time coverage on NBC (only 17 million viewers) compared to the 2016 Rio Games. NBC Sports Digital reached a record for the most-streamed Olympics prime-time show ever, compensating slightly for the slow activity.

The Delta variant and COVID resurgence is forcing consumers, brands, and agencies to once again reassess their plans and move more cautiously. In the meantime, the once-again top worldwide advertiser Procter & Gamble and its “constructive disruption” mantra caught my attention as it speaks to driving growth by building value for stakeholders and empowering teams to get closer to the consumer. P&G is making bold moves, pushing for innovative thinking, new experiences through its Signal conference, and offering us a new definition for what it means to be in advertising.

We are building new competencies in data science, ecommerce, and digital interactions. Tomorrow’s advertising will be, without a doubt, unprecedented.



Bruno Gralpois
Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources

Specialty talent is on the rise, and for this particular update I chose two esports and gaming-endemic agencies—Damage (in LA) and Paper Crowns (in NY)—specialized in the fast-growing esports category with a unique and differentiated offering. Gaming is everywhere, on every platform, device, and streaming service. The category is maturing as an advertising medium, fueled by innovation and high creativity, and brands need the right knowledge and expert competencies to address the gaming world and community. I also featured Cashmere, the lifestyle agency that recently became the “culture” AOR for Taco Bell. And 160over90, the newly appointed influencer and PR AOR for Abercrombie & Fitch-owned Hollister. No matter where you look, you will find so much talent and energy in advertising!

- September 14 is **Marketing’s Global Day of Learning**, featuring a free, curated series of world-class training, on-demand content, and pre-recorded interviews, workshops, masterclasses, and team building.
- Deutsch NY launched **Summer C.A.M.P.** (Creative Advertising & Media Program), a free, virtual, weeklong program that gives rising talent the opportunity to learn about brand-building, marketing, and communications during “diving lessons,” where students learn the fundamentals of account management, strategy, creative design, media, and production within a full-service advertising agency.
- Facebook’s** media agency continues with incumbent GroupM withdrawing from the brand’s ongoing global agency review. GroupM’s Mindshare has been the primary incumbent since 2014, while dentsu held a smaller portion of the account. Per COMvergence, the account could be in excess of \$742 million worldwide, based on measured media in 2020. Per the Wall Street Journal, the withdrawal could be linked to onerous contract terms shifting more risk and liability to the media agency.
- WarnerMedia** launched branded content studio House of Max, which will help advertisers develop custom creative for WarnerMedia’s entertainment properties, including HBO Max. Brands will leverage HBO Max talent and IP in custom campaigns that will be available on HBO Max and elsewhere. The studio will also develop creative for WarnerMedia’s other entertainment properties, which include TBS, TNT, and Adult Swim.
- Kraft Heinz’s** in-house agency, currently composed of 12 marketing teams covering 30-plus global markets, expanded its scope to focus on efficiency and creativity while improving the quality and efficiency of its marketing activities.
- KantanMT rebranded to KantanAI. **KantanAI** developed a range of platforms and technologies that combine Neural Machine Translation with advanced AI algorithms to accelerate translation delivery and improve communications effectiveness, helping clients develop better products and create smoother customer journeys.

- Per Ebiquity, 10 **guidelines for agency selection**:
 - 1) Ask yourself first if you’re sure you want or need to change your agency
 - 2) Make the pitch preparation phase a priority
 - 3) Think outside the box
 - 4) Make transparency a golden rule for all parties in the RFP process
 - 5) Define the rules of engagement from the start
 - 6) Brief agencies well, with qualitative content and clear expectations
 - 7) Set challenging, realistic, measurable, and commercial goals
 - 8) Build the foundations of a two-way relationship by positively engaging with agencies
 - 9) Encourage agencies to demonstrate creativity and delivery
 - 10) Make the process streamlined and agile
- Per TrinityP3, the **3P guide to successful agency selection** includes:
 - 1) People composition/consistency/transparency
 - 2) Purpose clarity/integrity/effectiveness
 - 3) Process efficiency/integrity and effectiveness
 The 4C Assessment Model includes:
 - 1) Capabilities
 - 2) Chemistry
 - 3) Creative access
 - 4) Commercial considerations.
- Per TrinityP3, research suggests that an **incumbent’s chance of successfully defending an account** is 10-20%.
- Agency Mania Solutions** launched two online training modules—“Building Partnerships That Last” and “How to Evaluate Creative Work”—as part of its newly introduced self-serve online training: Agency Mania University (AMU).

New agencies or capabilities, restructuring, and reorganizations:

- UK-based **S4 Capital** combined the 24 companies previously sitting underneath its content arm Media.Monks and data and digital media arm MightyHive under a new brand called Media.Monks, operating under one P&L across 6,000 digital-first experts and 57 unified talent hubs in 33 countries.
- Stagwell Inc. (www.stagwellglobal.com)**, the challenger holding company built to transform marketing, launched as the combination of MDC Partners (MDCA) and The Stagwell Marketing Group. The group is driven by four engines:
 - 1) Human-centered digital transformation and online media
 - 2) True scaled creative performance
 - 3) Innovative SaaS digital marketing products
 - 4) Integrated solutions at global scale. Stagwell (NASDAQ: STGW) targets growth to reach \$3 billion in revenue by 2025.

- Edelman launched **Edelman Global Advisory (EGA)**, a new firm that will be part of the DJE family, to provide tailored business and government advisory services to institutions seeking to navigate today's changing geopolitical and economic landscape. Edelman committed to an initial investment of \$10 million.
- Independently owned, Toronto-based, full-service advertising agency **Humanity** launched a creative, strategic, and human-centric kind of agency which leverages a strategic process rooted in "Four Dimensions of Wellbeing and how they can bring brands and people closer together, to help transform lives, strengthen brands and contribute to global generational change." The agency is part of the MH3 Group focused on the "Human Age."
- **Publicis Groupe UK** launched Publicis Play, a specialized gaming and esports department staffed by members of Publicis•Poke, Publicis Sport & Entertainment, and Spark Foundry.
- Dallas-based Omnicom consulting firm **Credera** (part of Precision Marketing Group) launched an Amazon Center of Excellence (COE), helping brands to thrive within the online retail giant's ecosystem, bringing together OPMG digital services, Amazon Web Services (AWS) technology and Credera's cloud offering.
- Marketing and communications company **VaynerX** appointed its first chief diversity officer to lead the diversity, equity, and inclusion efforts (employee recruitment and retention, training and education, supplier diversity, etc.) globally across the group of companies.
- Per Ad Age, nine brands are focusing their efforts and messaging around **climate change**, following the UN's recent and scary 'code red' assessment: Apple, General Motors, HP, IKEA ("Buy Back Friday" and "Trash Collection" campaigns), Budweiser ("Together We Can Turn This Around" campaign), Evian ("Drink True" campaign), Burger King ("Cows Menu" Whoppers), Tide ("#TurntoCold" campaign), BrewDog ("Lost Forest" campaign).
- Winners of the **2021 PRO Awards—Best Diversity Campaign**: NAACP for "111th NAACP National Convention" with Infinity Marketing Team.
- **FCB (Foote, Cone & Belding)** launched its inclusion practice, Upstream Inclusion, providing counsel to clients like GE Appliances, Kimberly-Clark, and Clorox on inclusive creative practices, taking their DE&I efforts to the next level.
- **Dentsu** announced that it limits payment terms to 30 days for minority media owners in an effort to help minority-owned media businesses in the US with critical cashflow and operations issues.

Diversity and inclusion, environment:

- **Havas Media Group** launched a new sustainability marketplace in the UK in partnership with clients EDF, giffgaff, and O2 as well as PubMatic, Good Loop, Tripelift and The Guardian, designed to provide access to publishers and networks that are focused on building a sustainable media ecosystem, and that foster sustainability-oriented content.
- London-based **Garden Studios**, a technically advanced and sustainable film production complex, designed specifically to support the latest production technologies, launched its Virtual Production studio to produce carbon neutral films (estimated to be 120 times less than the amount required to shoot at traditional multi-location film sets).
- Beverage giant **Coca-Cola** plans to nearly double its spending on minority-owned media companies by 2024, with businesses led by Black, Hispanic, and Asian-American and Pacific Islander (AAPI) people, accounting for 8% of its total annual media budget over the next three years in North America.
- The **American Association of Advertising Agencies (or 4As)** released a new body of research and comprehensive guide to eco-friendly messaging and eco-labeling standards called "Greenwashing in Advertising," outlining how agencies can and should approach environmental claims in their brand messaging, leveraging input from experts at the Environmental Protection Agency (EPA), the Federal Trade Commission (FTC), the National Advertising Division (NAD), legal experts on the FTC Green Guides, and others.

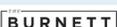
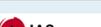
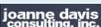
Noteworthy quotes:

- » “Stagwell is born from the understanding that modern culture demands the highest levels of agility and creativity to drive unique, connected experiences.”—Mark Penn, CEO, **Stagwell**
- » “Elevating and improving DEI is a collaborative effort between client and agency partners and both are on equal footing when it comes to implementing change.”—Suzanne Powers, Global President, Global Chief Strategy Officer, **McCann Worldgroup**
- » “Playing games is part of the talent that we hire. It’s where they want to work.”—Anne-Margot Rodde, Founder, **WePlay Consulting**
- » “What we rarely seem to acknowledge are the clients. Specifically, client behaviors that help enable great ideas.”—Mike Cronin, VP, Director of Strategy, **KC Truth**
- » “Changes and uncertainty abound. Marketers, agencies, and media outlets are all struggling with how to tackle the issues that have taken on newfound urgency in the past 18 months, including ethnic diversity, consumer privacy, and cultivating talent.”—John Wolfe, Director of Communications, **ANA**
- » “We’re shifting from a culture that has prioritized being polite to one that values passionate collaboration, which can be a little messy. I want leaders who don’t want to be right; they want to do the right thing.”—David Taylor, Chairman of the Board, President and CEO, **Procter & Gamble**
- » “The previous era of large formal reviews, where there were multiple face-to-face meetings with agencies involving lots of time out of the office and travel expense are likely a thing of the past.”—David Beals, President, **JLB + Partners**
- » “There’s no singular definition of creativity.”—Neil Dawson, Global Chief Strategy Officer, **Wunderman Thompson**
- » “This is a skill worth developing: to be daringly honest with someone, but simultaneously full of compassion for them. If you can do this, you can come face-to-face with anyone, even your true self.”—Paul Venables, Founder and Chairman, **Venables Bell + Partners**
- » “Crisis is absolutely the best crucible for shaping innovations.”—Vivek Sunder, COO, **Swiggy**

Company profiles:

- **Damage (www.damage-esports.com)** is an LA-based full-service esports agency dedicated to the growth of esports and authentic integrations with brands into the gaming space. Founded by gamers, they aim to deliver “thought provoking, category shattering campaigns and content that resonate within the gaming community.” Services include brand strategy and consulting, content production, creative development, team partnerships, experiential live and digital, and influencer marketing. Clients include TikTok, Ubisoft, Subaru, Blast, T-Mobile, and Konami.
- **Cashmere (www.cashmereagency.com)** is an LA-based lifestyle-marketing company comprised of a diverse collective of minds from the worlds of entertainment, advertising, and new media. The agency provides services in social media, creative strategy, digital trends, experiential, influencer, and public relations. It recently became the “culture” AOR for Taco Bell. Cashmere’s clients include Google, Instagram, Facebook, BMW NA, Danone NA, Heineken, DoorDash, adidas, WarnerMedia, Amazon, Hulu, Disney, Apple TV+, Netflix, Universal Pictures, FX, and CBS. Awards include 2019 Cannes Lions Creative Award, The Clio Awards, ADCOLOR, and A100. The company was named Ad Age’s Multicultural 2019 Agency of the Year and recognized on Ad Age’s 2020 A-List Agencies To Watch list and Ad Age’s 2021 A-List Standout Agencies.
- **Paper Crowns (<https://papercrowns.com>)** is a NY-based international gaming creative and marketing agency that goes by the motto “Reimagine Everything.” It was named Creative Team of the Year at the 2020 Esports Awards. The agency provides a wide range of services, from branding and identity work to website and software development, animation and motion design, video production, stage design, custom illustrations, apparel design, storytelling, and community connection. The agency works with some of the biggest video game publishers, leagues, streaming platforms, celebrities, content creators, and brands. Clients include Verizon, Activision, Rogue, Esports Engine, Vindex, Shopify Rebellion, Veloce, T-Minus, and Gallo.
- **160over90 (www.160over90.com)** is a NY-based global creative agency that sits within Endeavor, the global entertainment, sports and content company. Endeavor Global Marketing rebranded as 160over90, adopting the name of the Philadelphia-based agency it acquired in 2018 for \$200 million. The agency claims to be “the most culturally connected agency in the world” as a result of being part of Endeavor. Offices in the US include Atlanta, Beverly Hills, Charlotte, Chicago, Philadelphia, San Francisco, Santa Monica, and St. Louis. 160over90 also has offices in Dubai, Hong Kong, London, Shanghai, Singapore, Sydney, and Tokyo. Clients include Brawny, Allstate, Conagra, Saks Fifth Avenue, YMCA, Marriott Bonvoy, W Hotels, Under Armour, Michelob ULTRA, Electronic Arts, an UCLA.

Per AdForum and 4As, here is a list of major Pitch/Search consultants:

COMPANY LOGO	NAME	GEOGRAPHY	SCOPE
	AAR Group	London, EN	Marketing Ecosystems
	AAR Partners	NY, USA	Marketing Communications
	Agency Assessments International	London, EN	Advertising and Marketing Communications
	Agency Mania Solutions	Seattle, USA	Agency Partnerships Enablement
	Ark Advisors, LLC	New York, USA	Marketing Resource Selection, Compensation, Relationship
	Bajkowski + Partners	New York, USA	Agency Search Management, Relationship, Renumeration, Audits, etc.
	bob wolf partners/ TPG	Marina Del Rey, USA	Agency Counsel
	Booster Consulting	London, EN	Marketing Structures
	The Burnett Collective	San Francisco and Hermosa Beach, USA	Evolving Marketing Communications
	Breezeway Oy	Espoo, FIN	Marketing and PR agency Search, Remuneration, Audit
	Ciesco	London, EN	M&A Advisory
	DNCC	Hellerup, DEN	Communication Agencies
	Ebiquty	New York, USA	Marketing and Media Consultant
	Engage Marketing	Stockholm, SE	Nordic Consultants
	External View Consulting Group	Los Angeles, USA	Marketing Agency Search, Compensation, Metrics
	Flock Associates Ltd	New York, USA	Marketing Transformation
	GG Marketing Communication Consultancy	San Donato Milanese, IT	Advertising/Communication Agency Consultancy
	Hasan + Shumaker	Raleigh, USA	Agency Review and Selection
	IAS	Johannesburg, SA	Agency Search and Selection
	ID Comms	New York, USA	Global Management Consultancy
	ISBA	London, EN	Consultancy
	JBL+Partners	Chicago, New York, and San Francisco, USA	Agency Search, Compensation, Performance
	Joanne Davis Consulting	New York, USA	Full Service Consulting
	Juel Consulting	New York, USA	Executive Search and Talent Consultancy, Marketing
	Media Plus Advisors	Basking Ridge, USA	Agency Transitions, Relations
	MediaSense	New York, USA London, EN Mumbai, IN	Agency Selection/Pitch Management, Op Model Design/Digital Transformation, Global Media Auditing and Analytics

List of major Pitch/Search consultants (continued):

COMPANY LOGO	NAME	GEOGRAPHY	SCOPE
	Mercer Island Group	Mercer Island, USA	Marketing, Product, Sales Strategy Consulting
	Mitchell&McCue LLC	Dallas, USA	Agency Relationship Management and Agency Search
	Muster Consulting	Newton, USA	
	Mzyme	Dallas, USA	Consultant
	Navigare Pty Ltd	Melbourne, AUS	Governance and Oversight Protocols
	Observatory International	London, EN	Roster Model, Marketing Strategy
	Oystercatchers	London, EN	Marketing Transformation
	The Palma Group / Creative Agency Search	Atlanta, USA	Agency Brand Strategy, Pitch, Consultant
	Pile & Company	Boston, USA	Agency Search and Management
	PinSeeker Consulting	West Newton, USA	Marketing ROI Consultancy
	Pitchville	Paris, FR	Agency Communication Counsel
	R3 Worldwide	New York, USA Beijing, Hong Kong, and Shanghai, CN London, EN Singapore, SG	Agency Management Consulting
	The ROJEK Consulting Group	Fort Lauderdale, USA	Agency Search, Roster Review
	Roth Ryan Hayes	New York, USA	Search Consulting
	Select Resources International	Los Angeles, USA	Agency Search, Compensation, Relationship, Model Consulting
	SCAN International Network	New York, USA Amsterdam, NL	Client Agency Consultancy
	Scopen	Madrid, ES Beccar, ARG Sao Paulo, BRZL London, EN	Creative Search, Consulting
	Stone Soup Consultants	Glen Ellyn, USA	Agency Search, Consulting, Marketing Capabilities
	Tenx4		
	The Producer International	Milano, IT	Vendor Search, Pitching, Project Management
	VT Scan Groupe	Neully Sur Seine, FR	Agency Review Consultancy
	Wanamaker Associates	Atlanta, USA	Media Strategy and Placement
	Zach Rosenberg Consulting, Inc.	Tarzana, USA	Agency Search

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



We are seeing the signs of an “asynchronous recovery,” as some people call it. It’s apparent in the work being produced and in countless awards being won. Data and privacy have taken center of stage as cookie-based targeting goes away and first-party data becomes essential to future marketing programs. Work is improving as we improve our ability to evaluate creative as well. This is what motivated me to produce a playbook for the Association of National Advertisers.

Check out the new Creative Feedback Checklist for Marketers. Stay focused; stay strong. We will prevail.

- Horizon Media’s performance agency, Big, worked in conjunction with Horizon Media sibling Blue Hour Studios on air conditioning client Windmill, establishing a **bespoke compensation model** tied to its client’s business performance (sales goals, customer acquisition cost, email list growth, etc.). The client and agency set multiple KPIs around agreed-upon sales objectives and a sliding scale of compensation for the agency with a cap.
- **Publicis Groupe and TikTok** entered an agreement on social commerce, testing the platform’s new social commerce products and accessing exclusive strategic insights centered on driving product discovery and purchase intent on the platform. Publicis clients can test TikTok’s new commerce products, capabilities, and creative solutions.
- The German firm **Eyeo**, which operates the ad blocker Adblock Plus (ABP) and owner of the Acceptable Ads program, launched a demand-side platform (DSP) called Trestle.
- Out of Home (OOH) firm **Talon America** launched its proprietary data management platform, named Ada, in the US after a successful rollout in the UK with clients like McDonald’s, Virgin Media, and Starbucks. Ada traces insights into how that audience behaves in the offline world, understands patterns, generates a holistic view of behavioral groups, and provides clients ways to best find target audiences.
- **NBCUniversal** committed to incorporate Ad-ID into its media platform, the first major media company to sign up. Ad-ID identifies an advertising asset (any format, across any platform) and enables tracking, placement, optimization, and measurement at a creative level.
- **WARC report findings** identified four themes linking this year’s Cannes Creative Effectiveness Lions winners:
 - 1) Tech enriches creativity from the sideline
 - 2) Influencers amplified cultural impact
 - 3) Agile and unsexy wins the awards
 - 4) Stand up for what you believe in
- At the Ad Age Small Agency Conference, “**P&G’s Elevator Pitch**” allowed the advertiser to connect with dozens of potential new, small, nimble, fast-growing agency partners and develop a deeper understanding of the agency landscape, including agencies like OKRP, SRG, Cornett, The Variable, and DCX Accelerator, which now do work for the CPG giant. The fake elevator (with a maximum capacity of two people) records five-minute pitches for P&G executives to find new agencies to handle some of its marketing projects.



P&G’s Elevator Pitch

Awards:

- McCann Health was named the World's Most Awarded Network at the **Creative Floor Awards**, taking home 40 wins from six offices in five countries. The Most Awarded Agency was McCann Health New York.

- Per the 2020 and 2021 **Creative Floor Healthcare Awards**: Best Communications Agency was 21GRAMS.

- Per COR, **Top Creative Award Winners** included the following from **Clio Awards**:

- 1) Burger King: Moldy Whopper (INGO Stockholm/David Miami/Publicis)
- 2) Sandy Hook Promise: Back to School Essentials (BBDO NY)
- 3) Unilever's Good Humor: A New Jingle For A New Era (Edelman)
- 4) The Royal Australian Mint: Donation Dollar (Saatchi & Saatchi)
- 5) Asomediros: The Voice of Vera (Sancho BBDO)

From the **LIA Awards**:

- 1) Huawei: StorySign (FCB Inferno, London)
- 2) IKEA: ThisAbles (McCann TLV, Tel Aviv)
- 3) The New York Times: The Truth Is Worth It: Fearlessness (Wave Studios, New York)
- 4) Volvo Cars: The E.V.A initiative (Forsman & Bodenfors, Gothenburg)
- 5) March for Our Lives: Generation Lockdown (McCann New York)

From the **Cannes Lions International Festival of Creativity**:

- 1) Nike: You Can't Stop Us (Wieden+Kennedy, Portland)
- 2) Burger King: BK Stevenage Challenge (David Madrid/David Miami)
- 3) Mastercard: True Name (McCann New York)
- 4) World Wildlife Fund: Eurythenes Plasticus (BBDO Dusseldorf)
- 5) Diesel: Enjoy Before Returning (Publicis Italy)

From **The One Show Awards**:

- 1) San Francisco Symphony (Collins San Francisco)
- 2) Michelob, Microsoft, NBA: Michelob Ultra Courtside (FCB New York)
- 3) Sick Beats (Area 23, An FCB Health Network Company/New York + Claire's Place)
- 4) Miller Lite: Farewell, Work Holiday Parties (DDB/Chicago)
- 5) Apple: Shot on iPhone (TBWA\Media Arts Lab/Los Angeles)

- Per **Ad Age's Small Agency Awards 2021**, top winners were: Translation (Gold), Mischief @ No Fixed Address (Silver)
 - In the 1-10 employees: Even/Odd (Gold), Party Land (Silver)
 - In the 11-75 employees: Circus Maximus (Gold), Lightning Orchard (Silver)
 - In the 76-150 employees: Chemistry (Gold), SCC (Silver)
 - International: GIGIL (Gold), Zulu Alpha Kilo (Silver)
 - Culture: Color Creative (Gold), O'Keefe, Reinhard & Paul (Silver)
 - Experiential: Tech and Soul (Gold), The Bait Shoppe (Silver)
 - Media: Movers+Shakers (Gold), Media Matters Worldwide (Silver)
 - Newcomer: Special Group US (Gold), Broken Heart Love Affair (Silver)
- **Winners of the 2021 PRO Awards**, recognizing excellence in brand activation and promotion marketing were: Pringles and Adult Swim for their "Trapped in Advertising" campaign produced by agency Grey New York (Platinum PRO award). Some of the Gold winners:
 - 1) **Best B2B Campaign**: Amazon Web Services for "DeepRacer League" with PrizeLogic and Opus Agency.
 - 2) **Best Package Design**: Bud Light for "Bud Light BL6 Gaming Console" with agency Engine Shop.
 - 3) **Best use of AI/VR/AR**: Barefoot Wine for "Band Together" with agency FlyteVu.
 - 4) **Best Outdoor Campaign**: OnePlus and T-Mobile for "Go Farther" with agency The Bait Shoppe.
 - 5) **Best Virtual Event or Experience**: Executive Leadership Council for "2020 Recognition Gala" with CPG Agency.
 - 6) **Best Social Media**: GEICO and NASCAR for "GEICO/NASCAR Social Promotions" with agency Scout Sports and Entertainment.
 - 7) **Best Buzz**: Stella Artois for "Dining Together Apart" with agency Mosaic.
 - 8) **Best Brand Awareness**: Advance Auto Parts for "DieHard is Back" with agency The Marketing Arm.
 - 9) **Best Retail Campaign**: Vogue International for "OGX Digital Commerce Campaign" with agency The Integer Group.
 - 10) **Best of Influencer Marketing**: Dairy Farmers of Wisconsin for "Virtual Cheeselandia" with agency We Must Be Bold.
 - 11) **Best Use of Emerging Technology**: ViacomCBS for "Jersey Shore Family Vacation Shoppable Content" with their in-house agency.

Noteworthy quotes:

- » “What we want to do is find a constructive disruption that creates value for our consumers, our communities, and other stakeholders—to build our company and empower our people.”
—David Taylor, Chairman of the Board, President and CEO, **Procter & Gamble**
- » “We have to think about how we help clients activate data. And we have to be agnostic.”
—Mark Read, CEO, **WPP**
- » “It’s moved out of the experimentation zone... to something scaled. Businesses are using AI to scale business value and enterprise value.”
—Sanjeev Vohra, Senior Managing Director, Global Lead - Applied Intelligence, **Accenture**
- » “Apple could plug this ad product into all the social networks—allowing brands to run their best creative assets on a billion devices.”—Casey Saran, CEO, **Spaceback**
- » “Analytics, AI, and automation practices all [have to come] together, along with data management... to create the solutions required for a company to become intelligent.”—Sanjeev Vohra, Senior Managing Director, Global Lead, Applied Intelligence, **Accenture**
- » “We’re connecting with issues outside of our clients, doing more for sustainability, doing more not-for-profit, responding to the issues that cause culture to get stirred, and people to take action.”
—Vanessa Romann, Chief Growth Officer and Managing Director, **Havas NY**
- » “The best clients understand that setting an initial tone is vital. They don’t enter a discussion of creativity from the standpoint of what’s wrong with it, but what’s right with it. They explore the possibilities. Not every idea is good. Giving every idea a reasonable chance at the outset can build momentum.”—Mike Cronin, VP, Director of Strategy, **KC Truth**
- » “In a performance-driven marketing environment, creativity is still the oxygen to growth.”
—Ann Mukherjee, Chairman and CEO, North America, **Pernod Ricard**
- » “Don’t control creativity. Unleash it. Cling to ‘what if we’ over ‘yeah, but.’”—Paul Venables, Founder and Chairman, **Venables Bell + Partners**
- » “[Without third-party cookies], a renaissance in digital creativity is about to begin.”—Ricardo Diaz, Partner, Chief Digital Officer, **Omelet**
- » “We are moving from outputs to outcomes. There is an increased focus to really understand what has been delivered.”—Marla Kaplowitz, President and CEO, **4As**

Check out our new module “How to evaluate creative work” as part of our newly introduced Agency Mania University, which offers online agency management training courses. For more information: <https://www.agencymania.com/online-marketing-agency-management-training-courses>

Available Now!

Online Agency Management Training Courses

-  Video
-  Real-world scenarios
-  Knowledge checks
-  Downloadable supporting resources

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COURSE 02

 AMU

How to evaluate creative work

Course Description :

Is it an art or a science? Conducting effective creative reviews and providing feedback to your agency partner is a critical skillset every client should master. By removing the subjective nature of feedback from the equation and focusing on a logical structured and proven process that evaluates creative based on whether it meets business goals, you and your partner can collaborate effectively to deliver better quality work.

Who it's for :

- Marketers
- Marketing Procurement
- Agency Management Teams (at any level)

Check out this new checklist for marketers:



Excerpted from The Creative Feedback Playbook by Bruno Galpois

CREATIVE FEEDBACK CHECKLIST FOR MARKETERS

Provide High-Quality Feedback	DO	DON'T
Be well prepared	Do as much of the work as possible at the briefing stage and in advance of the meeting to align internally.	Do NOT proceed too far in the process without having alignment internally.
Be attentive and engaged throughout	Attend this meeting open-minded (you may not be the audience) and entirely focused. Be present.	Do NOT attend this meeting with a hidden agenda, a bias, or get easily distracted by email or your phone.
Be truthful and respectful at all times	Be transparent and direct. Show respect for the time and effort involved.	Do NOT dance around issues or wait until after the meeting to share your input. Do not condemn. Criticize the work itself and the work only.
Share positive feedback (encouragement)	Share what you like best about the work, and why. Example: "This is terrific work. I like this particular idea for the following reasons..."	Do NOT simply state that you like something as lip service or without explaining why.
Share negative feedback (concerns)	Share your concerns and invite the agency to comment. Example: "I am not sure this would work for the following reasons . . . Aren't you worried that...? How would you prevent this?"	Do NOT be prescriptive or propose solutions.
Ask clarifying questions	Ask open-ended questions, prompting brainstorming and open dialogue, e.g., "What made you decide to take this direction?"	Do NOT ask loaded questions that box in the agency or limit constructive dialogue.
Be useful, honest, and constructive	Be specific, providing substantive and constructive input.	Do NOT be vague or provide input that is not practical or productive.
Be short and concise in your feedback	Be clear and to the point, providing succinct input. Example: "Here are three things that I like or would like to see."	Do NOT go on and on for too long or elaborate on a point that does not warrant it.
Combine both heart and brain when reviewing work	Share how the work makes you feel (emotionally) and what you think about it (rationally).	Do NOT limit your input so that it's coming only from an emotional or a rational perspective.
Be thoughtful and patient before speaking	Consider all input points before sharing your perspective. Consult with others, if needed. Take your time. Give yourself permission to reflect.	Do NOT jump in with half-baked feedback, jump in before you are ready, or rush to judgment.
Invite suggestions or ideas	Invite the agency to consider ways to improve or strengthen the work, using sentences like "How would you address this?" or "How would you make this stronger?"	Do NOT impose or forcefully push suggestions onto the agency.

Lyrics—“We Will Prevail”

Tune by sailor song pro David Coffin, set to the classic sailor tune “Blow the Man Down,” opened day two of Ad Age’s Small Agency Conference:



*The pandemic is over and
we’re standing tall
To me way hey, we will prevail!
The scope of our work we do
not low ball
Our purpose is clear, we’re too
strong to fail.*

*Whoever said, “Size matters,” they had it right
To me way hey, we will prevail!*

*The smaller the shop, the brighter the light
Our purpose is clear, we’re too strong to fail
Take your BBDO, WPP, DDB,
To me way hey, we will prevail!*

*Takes more than acronyms for a shop
to succeed
Our purpose is clear, we’re too strong to fail*

*We Zoomed our reviews but they won’t make
us rich
To me way hey, we will prevail.
We need just two floors for our elevator pitch
Our purpose is clear, we’re too strong to fail.
With contactless payment and pickup curbside
To me way hey, we will prevail.
We’ll transform your business and do it
with pride
Our purpose is clear, we’re too strong to fail.*

*With our creative minds there are no bounds,
To me way hey, we will prevail.
When you sing a sea shanty, the heads
turn around*

Our purpose is clear, we’re too strong to fail.

FINANCIALS: Driving efficient use of resources



Brands are reinvesting in marketing, particularly in digital media, ecommerce, and marketing technology. As client confidence returned and spend increased, holding companies are emerging from the pandemic with strong Q2 earnings and showing strong performance in the first half of the year with double-digit organic growth, compared to negative growth the year prior for most of them. This is a remarkable rebound and turning point with continued progress on public health and sustained macro recovery and they are now upgrading expectations for full fiscal 2021 financial performance. Yet, once again, the big winners are the social media and ecommerce giants Facebook and Amazon with results that any agency would envy. Facebook revenue was up 56% in Q2 and Amazon's advertising revenue was up 87% YOY.

- Due to a rapid and broad-based recovery, the **ad industry consensus** for 2021 global ad growth is now +13.1%, following some adjustments from media firms dentsu and Zenith. The 2021 US ad-growth consensus is now +14.6%, up from the previous +12.2%.
- Per Ad Age Datacenter, **Procter & Gamble Co.** is once again the world's biggest advertiser with estimated marketing spending of \$11.5 billion (a 7% increase YOY), ahead of the \$10.9 billion in 2020 worldwide advertising and other promotional costs spent by Amazon. It's worth noting that P&G ranked No. 1 in all but two years since Ad Age began its global ranking in 1987.
- **Connected TV (CTV)** seems to gain in size as CTV advertisers increase their spend and look for better ways to spend their marketing dollars. eMarketer is projecting CTV spend to surpass \$13 billion in 2021 and \$17 billion in 2022.
- Per Zenith's **Advertising Expenditure Forecasts** report, online video advertising will be the fastest-growing digital channel in 2021, rising 26% to \$63 billion. Digital advertising is expected to grow by 19% this year and increase its share of total ad spend to 58%—up from 48% in 2019. Social media will grow 25%, to \$137 billion, surpassing paid search for the first time (which will expand by 19%, to \$135 billion).
- Per iSpot.tv, national TV ad spend across NBCU's TV networks for the **Tokyo Olympics** reached \$135 million for its opening weekend. The games were off to a slow start this year compared to the last ones in Rio, with far fewer viewers during the opening ceremony.
- eMarketer estimates that spending on **influencer marketing** in the US will surge past the \$3 billion mark in 2021, a 33.6% increase YOY, and reach a total of \$4.14 billion by 2022.
- Per IDC, investment in **artificial intelligence (AI) technology** rose from \$37.5 billion globally in 2019 to over \$50 billion in 2020. It's estimated to reach \$110 billion by 2024. Per Statista, the global cloud computing market will exceed \$362 billion in 2022. Per IDG, the average cloud budget is \$2.2 million today.

- Video is king. **YouTube** generated \$7 billion in revenue in Q2 alone, drawing close to Netflix's quarterly revenue, which was \$7.34 billion—an 84% increase YOY and up 35% in a single quarter, on a trajectory to become a \$30 billion per year business.
- Beverage giant **Coca-Cola** doubled its YOY marketing spend in Q2, returning to pre-pandemic levels with a renewed focus on innovation, effectiveness, efficiency, and improving quality of spend and allocating it in a more targeted manner.
- Per COMvergence, **Omnicom's OMD** remains the top media agency network by billings, ranking first worldwide for the second year in a row, with total 2020 billings estimated at \$21.3B (the equivalent of the top 60 local media agencies combined), followed by GroupM's Mindshare (2nd with \$20B) and Carat (3rd with \$15.5B). Horizon Media ranked as the largest worldwide independent agency with billings of \$7.2 billion or one-third of all independent billings.

Mergers and acquisitions (M&A) activity:

- MDC Partners Inc. and Stagwell Media LP are merging, combining nearly 10,000 employees and now operating under one name—**Stagwell Inc.** Per Ad Age's Datacenter, the combined company, now traded on the NASDAQ, will have worldwide revenue of \$2.1 billion and rank 14th behind Cheil.
- Chicago-based marketing services agency **Merge** acquired digital marketing consultancy Blue Moon Digital (with clients like Kate Spade and The North Face) to offer clients deeper retail marketing expertise, with an end-to-end set of scalable ecommerce and data-driven solutions.
- B2B company **Taboola** acquired Connexity (formerly "Shopzilla," the independent ecommerce media platform in the open web with +1,600 direct merchants and +6,000 publishers) from Symphony Technology Group for \$800 million.
- **S4 Capital** acquired Destined, which will be merged with programmatic unit MightyHive to enhance its data and digital media capabilities in Asia-Pacific as well as its global Salesforce capabilities. Recognized by Salesforce as a "Platinum Partner," the firm specializes in digital transformation strategy, Salesforce implementation, integration strategy and execution, managed services, training, and change management. Clients include Spotify and Panasonic.
- **Edelman** acquired long-time Edelman partner and Washington, DC-based strategic consulting company Basilinna, which it used to launch Edelman Global Advisory.
- **Accenture** acquired Italian-based commerce specialist Openmind, a firm with experiences on cloud platforms including Adobe, Salesforce, and SAP, which will now operate under Accenture Interactive. The firm is strengthening its capabilities across commerce, content, strategy, experience design, and technology.

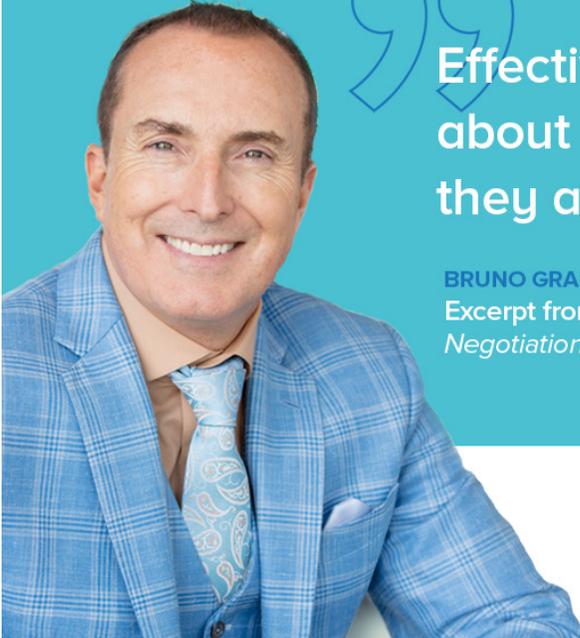
- Southern California agency **SCS** merged with Atlanta-based independent digital performance agency Swarm, which provides strategy, marketing, design, and technology services. The merged company will operate as SCS.
- WPP **Kantar** acquired Chicago-based, tech-driven, consumer and market intelligence company Numerator from investment firm Vista Equity Partners, a deal valued at \$1.5 billion. Numerator blends proprietary data, including a digital panel of over one million US consumers, with advanced technology to create unique insights that help companies understand their customers in real time and identify growth opportunities.
- **Integral Ad Science (IAS)** acquired the connected TV ad platform Publica (and its technology platform and proprietary data assets) for \$220 million to help publishers better monetize their video programming across CTV devices while building new tools to provide advertisers with much-needed transparency into the quality of this inventory.
- Investment firm **Apiary Capital** acquired London-based media consultant MediaSense which has been providing consulting, analytics, audits and media reviews for the past 12 years. MediaSense is estimated to manage \$15+ billion of media expenditure on behalf of its clients and 45% of the global pitches conducted in Q2 of this year.
- UK-based digital agency **Brainlabs** acquired Toronto-based programmatic agency Media.net as part of an expansion in North America. Brainlabs operates in the UK, North America, and Singapore.
- **Omnicom Group** posted 27% YOY revenue growth or \$3.5 billion. Organic growth (which strips out M&A and currency impact) was 24.4%, mostly led by its advertising division, which includes media agencies. CMR precision marketing, ecommerce, and brand consulting were big drivers. Net income for the quarter was \$348 million versus a net loss of \$24.2 million a year ago, a strong indicator that the group is rebounding, fueled by digital, commerce, and media. Operating margin increased to 15.9% in Q2 versus 2.2% the year prior.
- **Interpublic Group of Cos.** posted organic growth of 19.8% in Q2 (17.4% in the US and 24.4% internationally), a strong result compared to last year's 9.9% decrease. Net revenue in Q2 was up 22.5% YOY, to \$2.27 billion. Net income was \$263.3 million. First half 2021 net revenue of \$4.30 billion showed an increase of 12.3% compared to \$3.83 billion in the first half of 2020. Staff cost ratio, which is total salaries and related expenses as a percentage of net revenue, decreased to 65.4% in the second quarter of 2021 from 70.5% in the same period in 2020, and decreased to 67.0% in the first half of 2021 from 71.3% in the same period in 2020.
- Vivendi-owned **Havas Group** reported revenues up 7.3% to just over €1 billion (or \$1.2 billion) and a net organic revenue growth of 16% YOY. New business wins included Volkswagen (CX), Cox Communications (Creative) and De Beers (Media). Sanofi and Novartis retained their multi-year contracts with the network.
- **Dentsu Group** reported JPY 243 bn in revenue and organic revenue growth of 15% in Q2. Dentsu Japan Network grew by 12% while dentsu International registered a growth of 17%.10, over Q1 decline of 2.4%. Group revenue reached JPY 440.5 billion in the first half of the year (YOY +7.8%, +5.6% on a constant currency basis) and organic growth of 5.4%. In H1, dentsu's operating profit increased by 35.8% as a result of higher revenue and cost reductions being implemented. The acquisition of LiveArea strengthened the Group expertise in the fast-growth areas of consumer experience and ecommerce.

Holding company and digital player financial results:

- **WPP** reported H1 revenue up 9.8%, Q2 being up by 26.4% fueled by \$2.9 billion in net new billings in H1 (AstraZeneca, Bumble, JP Morgan Chase and Pernod Ricard), with growth areas in experience, commerce, and technology representing 26% of revenue. Q2 net revenue was £2.6 billion with organic growth of 19.3%. H1 operating margin was 12.1%, up 3.9 pts YOY. WPP launched Choreograph, its future-ready data and analytics company. Kantar agreed to acquire Numerator and WPP completed technology acquisitions in Brazil and UK. WPP won 190 Cannes Lions including 12 Grand Prix, one Titanium, 28 Gold, 57 Silver, and 92 Bronze.
- **Publicis Groupe** reported a strong second quarter with \$2.75 billion in revenue and organic growth of 17.1%, improving by 2% compared to 2019, despite the effects of the pandemic and citing strong acceleration in the US at +15.2%, with Epsilon at +31.1% and Publicis Sapient at +27%. The group's overperformance was largely driven by the US and Asia, which both grew +7% versus 2019. In H1 overall, the firm posted organic growth of +9.7%, leading to an operating margin rate at 16.5%, the group's highest ever for a first half period.

- **Amazon’s advertising business** grew 87% YOY in the second quarter to over \$7.9 billion, representing an estimated 10% of the digital ad market. The profitable division launched “over 40 new features and self-service capabilities” during that period. The firm will exclusively stream Thursday Night Football, getting into the digital upfront and competing for TV ad budgets.
 - **Google** ad revenue surpassed \$50 billion in Q2. Google advertising revenue rose 69% from last year. Retail was by far the largest contributor to the company’s ad growth. YouTube revenue came in at over \$7 billion (with over 120 million people who watch YouTube on their TVs every month). Parent company Alphabet reported revenue up 62% and operating income up 31%.
 - Social-media platform **Twitter** reported a 74% increase in revenue in Q2, reaching approximately \$1.2 billion (advertising revenue surpassing \$1 billion). The number of daily users reached 206 million, an 11% increase in Q2. Sales and marketing expenses grew by 46% due to higher sales commissions, people costs, and increased marketing expenses.
- Noteworthy quotes:**
- » “Apple could use the existing ad infrastructure—the same pipes and placements that perpetuate its mobile browser and apps—and push social ads out to roughly 60% of the mobile traffic in the US.”
—Casey Saran, CEO, **Spaceback**
 - » “With transparency high on the agenda for advertisers, agency evaluation today goes well beyond assessing commercial promises. Gone are the days of old-fashioned creds and one-size-fits-all solutions.”—Laetitia Zinetti, Managing Director, Continental Europe, **Ebiquity**
 - » “We feel rooting our compensation in business outcomes crucial to our clients’ success is less about gimmicks and more about shared culture and identifying the capabilities and incentives we can draw upon to create those outcomes.”
—John Koenigsberg, General Manager, **Big**
 - » “Our focus on data, commerce and technology, through strategic acquisitions, organic investments, and the launch of Choreograph, has supported a strong new business performance.”—Mark Read, CEO, **WPP**
 - » “Increased investment in content by ad-free or ad-light streaming services while ad-supported TV networks hold the line or reduce spending on content will lead to an increasing share of consumer time in ad-free environments.”—Brian Wieser, Global President, Business Intelligence, **GroupM**
 - » “We can’t predict the future. But we do know that we’ve lived through a hell of a past and have done it successfully. So that gives us confidence.”
—John Wren, CEO, **Omnicom**

Check out my new article “**How to Manage Successful Agency Negotiations**”: Cutting corners and making compromises all too often ends in reduced quality of resources and endangers long-term growth. Read my latest article to learn productive and effective negotiation skills: www.agencymania.com/article-how-to-manage-effective-agency-negotiations



Effective agency negotiations are not about responsible cost management, they are about value creation.”

BRUNO GRALPOIS
Excerpt from the new article: *How to Manage Successful Agency Negotiations.*

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Courtesy of R3, here is a summary of new accounts and account moves in recent months:



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DRIVING TRANSFORMATION FOR MARKETERS & THEIR AGENCIES

Est. Billings in US\$

NEW ACCOUNTS IN REVIEW

REGION	BRAND	INCUMBENT	CREATIVE	MEDIA	EST BILLINGS	LED
UK	CompareTheMarket	Wavemaker			\$50m	n/s
Europe	Kingfisher (B&Q, Castorama)	Wavemaker, Mindshare			\$30m	n/s
Global	CFA Institute	Ogilvy, NEO			\$30m	R3
Global	Durex	Havas			\$60m	R3
China	Metersbonwe	n/s			\$100m	R3
China	MINI	n/s			\$50m	R3

CREATIVE ACCOUNT MOVES

REGION	BRAND	WINNER	CREATIVE	DIGITAL / SOCIAL	PR	CRM	INCUMBENT	EST BILLINGS
UK	Adobe	Ketchum					Red Consultancy	\$5m
Germany	Betway	David und Martin					Saatchi & Saatchi	\$10m
UK	British Heart Foundation	Saatchi & Saatchi					MullenLowe	\$5m
Europe	Desperados	Publicis.Poke					W+K Amsterdam	\$10m
Malaysia	EMart24	Beatnk, Rebl, McGagh Communications					n/s	\$5m
Global	Frankfurt Book Fair	Syzygy					n/s	\$10m
UK	Grosvenor Casinos	Isobel					St. Luke's	\$10m
S.Africa	Johnnie Walker	TBWA					Wunderman Thompson	\$15m
US	LegalZoom	Hubbub Manufacturing					n/s	\$8m
Australia	LG Electronics	The Works					n/s	\$12m
Global	LinkedIn	Golin					EP & Co	\$20m
Europe	Meetic, Match, Love Scout, etc.	WNP, Harbour, Hirschen Grp					Marcel	\$40m
UK	Pizza Express	Engine					n/s	\$15m
UK	Sainsbury's Beauty	New Commercial Arts					n/s	\$10m
Australia	SodaStream	Thrive PR+Communications					n/s	\$5m
Europe	Trident gum	Publicis.Poke					Ogilvy	\$15m

MEDIA ACCOUNT MOVES

REGION	BRAND	WINNER	MEDIA	INCUMBENT	EST BILLINGS
Germany	Flixbus	Wavemaker		n/s	\$10m
US	I Love NY (NY Tourism)	UM		Zenith	\$10m
Australia	Insurance Australia Group	Initiative		Mindshare	\$18m
Germany	Miele	Wavemaker		Pilot Media	\$20m
Malaysia	Pizza Hut	Dentsu Malaysia		n/s	\$10m
US	Red Bull	PHD		Starcom	\$100m

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.

- **AmeriSave Mortgage Corporation** selected Havas Group’s Arnold as its creative AOR, without a review, replacing incumbent The Martin Agency, which the brand worked with on a project basis. The decision followed the hire of a new CMO a few months prior.
- **CKE Restaurants** selected Omnicom’s Haygarth US (part of Omnicom Commerce Group) as its In-Store Marketing and Merchandising AOR, following a review. The agency will handle point-of-sale, food photography, digital and printed menus, and all merchandising for Carl’s Jr. and Hardee’s restaurants.
- Abercrombie & Fitch-owned **Hollister** selected NY-based global creative agency 160over90 as its influencer and public relations AOR, following a review. The agency will leverage the brand’s influencer program, The Hollister Creator Collective, which includes 32 top influencers.
- **H&R Block** selected Carmichael Lynch as its strategy and creative AOR, following a review. The agency will handle strategy, creative, and social media in support of Block Horizons 2025, the brand’s five-year growth and transformation strategy. Sister agency Carmichael Lynch Relate will handle public relations. Carmichael Lynch will partner with GALE on media planning and buying, data and analytics, and CRM.
- Ethical real estate management giant **JLL** selected Havas as its global brand strategy and creative services AOR, following a review and replacing incumbent dentsu’s Gyro. The agency will handle brand strategy and creative platforms, with local execution and adaptation in the Americas, EMEA, and APAC led by the network’s New York, London, and Singapore Villages.
- French luxury giant **Kering Group** (which owns brands like Gucci, Yves Saint Laurent, Alexander McQueen, Balenciaga, and others) kicked off a review of its global media planning and buying account with a focus on innovation and digital. Incumbent Publicis media shop Zenith will defend.
- Dairy brand **Land O’ Lakes** selected Battery (LA) and Havas Media North America as creative and media AORs, respectively, for its Dairy Foods retail brands, following a review. Battery will handle creative strategy and execution. Havas Media will handle all media planning and buying for the brand’s butter, cheese, and licensee products.

- Whisky brand **Monkey Shoulder** (part of William Grant & Son) selected Fallon NY as global and US creative AOR, following a review. The agency will handle strategy, creative, and marketing communications.
- Children’s sock brand **Pals Socks** selected New York-based creative agency Terri & Sandy as its first AOR, without a review. The agency will handle strategic and creative duties, expanding on original efforts focused on PR, organic social, and word of mouth.
- **Taco Bell** selected full-service, lifestyle-marketing shop Cashmere as its first “culture” AOR with the goal to grow its youth consumer base and build authentic connections with diverse and multiethnic audiences. The agency will handle cultural brand strategy and integration throughout the Taco Bell organization.
- **Ubisoft** selected full-service marketing and creative agency Damage the Esports Agency as its AOR for Tom Clancy’s Rainbow Six Esports North American League, following a review. The agency will position R6NAL as one of the premier esports leagues in North America via digital media, social, and other activations.
- Retail giant **Walmart** selected Publicis Groupe as its new media planning and buying AOR in the US, following a review considered to be one of the largest of the year, and replacing five-year-long incumbent WPP-backed Haworth. The agency will handle media strategy, planning, buying, and partnerships and collaborate with roster agencies Deutsch LA and FCB.
- Denim brand **Wrangler** selected Yard NYC as its strategic creative partner, following a review and replacing two-year incumbent Mother New York. The agency will handle TV, digital advertising, paid social, and in-store window displays.



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Agency roster summary:

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Abercrombie & Fitch (Hollister)	Unknown	Influencer and Public Relations AOR	Global	160over90	Y
	AmeriSave Mortgage Corp	The Martin Agency	Creative AOR	Unknown	Arnold Worldwide	N
	CKE Restaurant Holdings (Carl's Jr. and Hardee's)	Unknown	In-Store Marketing and Merchandising AOR	U.S.	Haygarth	Y
	H&R Block	Unknown	Strategy and Creative AOR	Unknown	Carmichael Lynch	Y
	JLL	Gyro	Brand Strategy and Creative AOR	Global	Havas	Y
	Kering Group (Gucci, Yves Saint Laurent, etc.)	Zenith	Media Planning and Buying	Global	(in review)	Y
	Land O'Lakes (Dairy Foods brands)	None	Creative AOR	North America	Battery (LA)	Y
	Land O'Lakes (Dairy Foods brands)	None	Media Planning and Buying AOR	North America	Havas Media	Y
	Monkey Shoulder (William Grant & Son)	None	Creative AOR	Global, U.S.	Fallon NY	Y
	Pals Socks	Unknown	Creative AOR	Unknown	Terri & Sandy	N
	Taco Bell	None	Culture AOR	Global	Cashmere Agency LA	N
	Ubisoft		AOR (Digital Media, Social, etc.)	North America	Damage the Esports	Y
	Walmart	Haworth	Media Planning and Buying AOR	U.S.	Publicis Groupe	Y
	Wrangler	Mother NY	Creative	Unknown	Yard NYC	Y