

ebiquity

# Spotlight:

The impact of the pandemic  
on the agency business



# Today's Agenda

## 1. RECAP: 2020

Overview of impacts we've seen from COVID-19

## 2. COVID-19: Agency Impacts Update

Overview of the Agency Strategic response to COVID-19 impacts

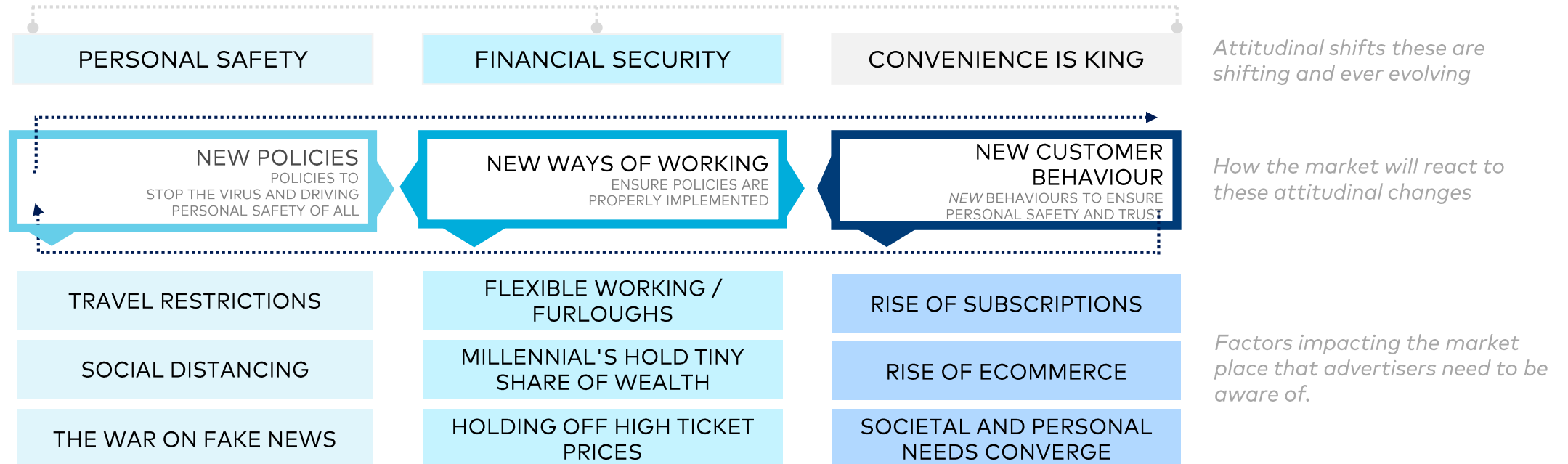
## 3. COVID-19: Impacts on Agency Selection Landscape

Summary of how COVID is impacting the pitch landscape

# THE RISE OF *NEW* POLICIES, WAYS OF WORKING & CUSTOMER BEHAVIOURS ARE FURTHER DISRUPTING THE MEDIA MARKET

Crisis often leads to long-lasting changes...

 CRISIS = COVID-19

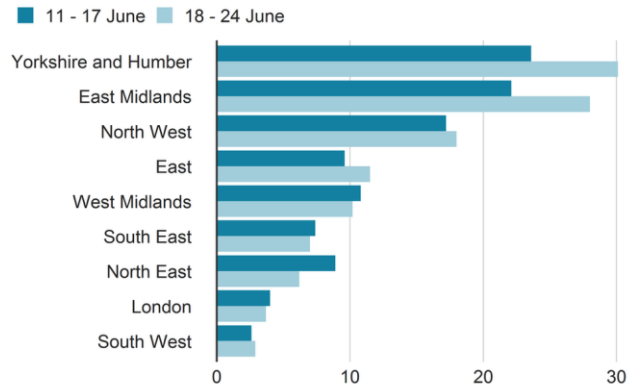


# CHANGES IN LEGLISATION TO DELIVER PERSONAL SAFETY HAS A GREATER LOCAL FOCUS

## TRAVEL RESTRICTIONS: LOCKDOWNS

### New confirmed cases of coronavirus

Rate per 100,000 population each week



Figures include Pillar 1 of healthcare workers and tests in hospitals and Pillar 2 tests outside of hospitals

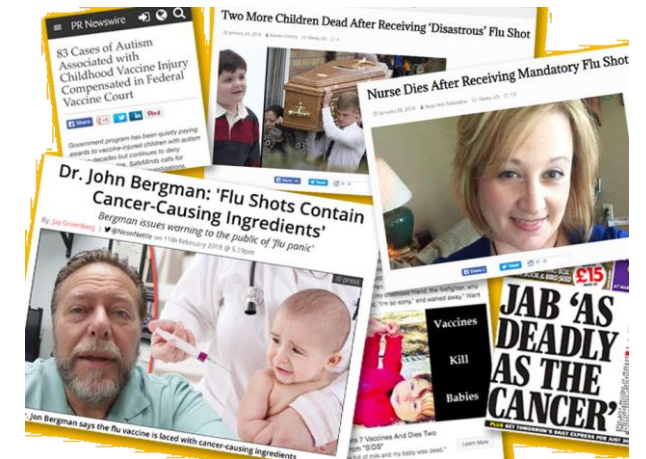
Source: Public Health England



## SOCIAL DISTANCING



## PROPAGANDA & MISINFORMATION: THE WAR ON FAKE NEWS



# HIGH UNEMPLOYMENT, REDUNDACIES, FURLOUGHS, PEOPLE ARE MORE FINANCIALLY CONCIOUS

## COST CUTTING MEASURES ENACTED: FURLOUGH, REDUNDANCIES

....

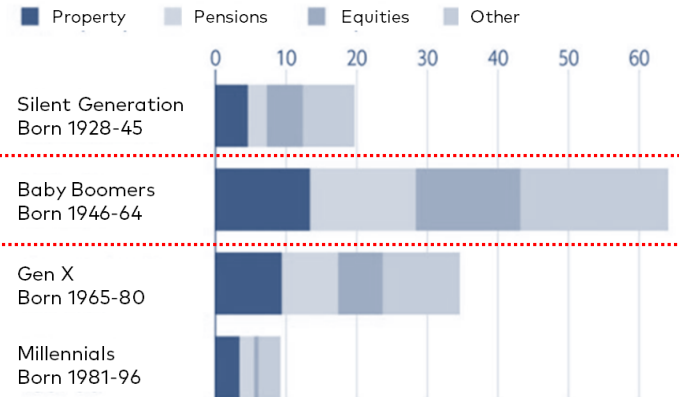
**AUS** › \$130 billion 'Job keeper' financial stimulus

**USA** › No temporary compensation package has been created for employers/ employees for this period of financial hardship.

**UK** › Employees will receive 80% of their current salary for hours not worked

## MILLENNIALS HOLD A TINY SHARE OF TOTAL WEALTH

United States, Total assets, \$Trn  
End Q2 2020



## HOLDING OFF BIG TICKET PURCHASES

**DELAY BIG PURCHASES**  
(E.G. CAR, VACATIONS, HOME APPLIANCES, ETC.)

 **80%** 

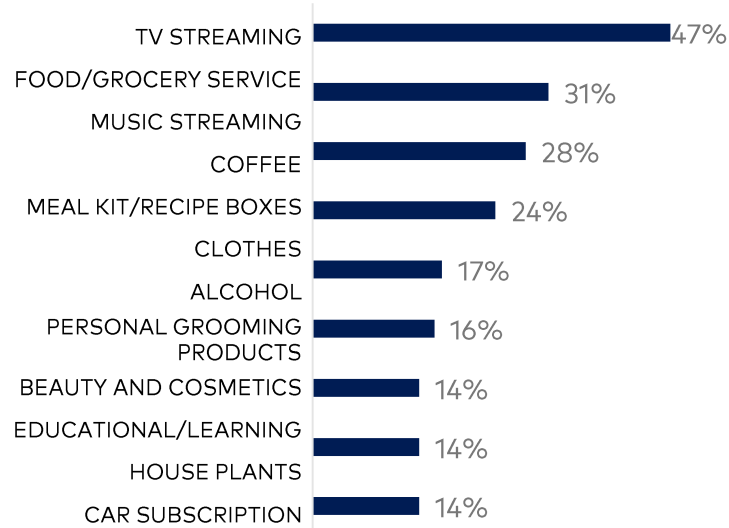
**VACATIONS**  **50%**

**LUXURY ITEMS**  **26%**

**FLIGHTS**  **30%**

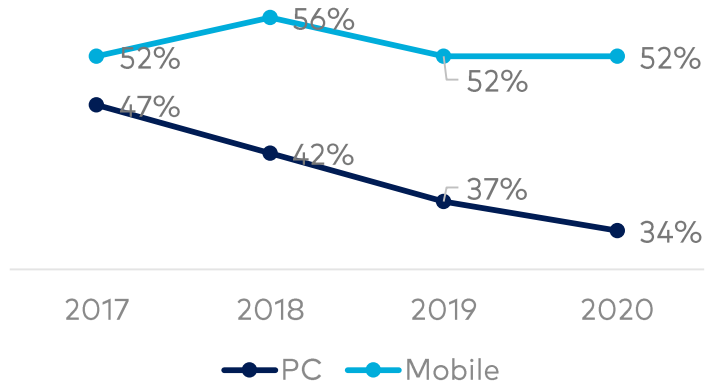
# CONSUMERS SAFETY & TRUST REQUIRE CONVENIENCE IN AN A COMPLEX ENVIRONMENT

## RISE OF SUBSCRIPTION BASED PLATFORMS



31% of consumers say that the main reason for purchasing a subscription is because it's cheaper/better value for money

## RISE OF ECOMMERCE



Globally, half of baby boomers have purchased a product on a PC/Laptop in the last month, compared to just 27% of Gen Z, who are more inclined to use mobile

## SOCIETAL & PERSONAL NEEDS CONVERGE



2020 shifted **brand purpose** into a whole new gear



The image is a screenshot of a social media post from Nike. At the top left, there is a circular profile picture of Nike with the word "nike" and a verified badge. At the top right, there are three dots indicating more options. The main content is a white square with bold black text. The text reads: "IF YOU EVER DREAMED OF PLAYING FOR MILLIONS AROUND THE WORLD, NOW IS YOUR CHANCE." Below this, in a smaller font, it says "Play inside, play for the world." At the bottom center of the white square is the Nike swoosh logo.

 nike  

**IF YOU EVER  
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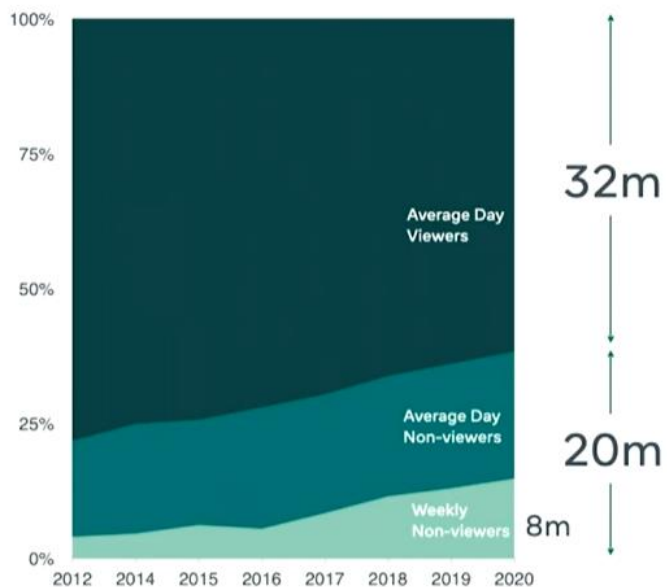


MEDIA BEHAVIOURS ARE SHIFTING

# AS CHANNEL BEHAVIOURS CONTINUE TO *SHIFT* MEDIA PLANNING IS MORE IMPORTANT THEN EVER

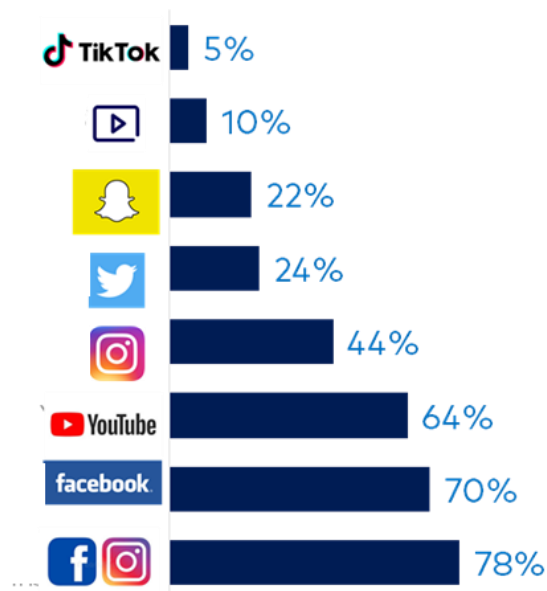
## LESS AVAILABLE COMMERCIAL AIRTIME

COMMERCIAL LIVE / RECORDED TV VIEWING DAILY COMPOSITION ALL GB ADULTS



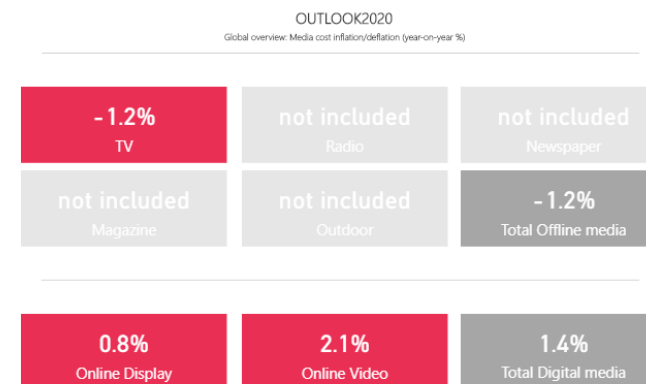
## MULTICHANNEL IS NOW ESSENTIAL

% GB NON-VIEWERS OF COMMERCIAL TV REACHED IN A WEEK



## VOLATILITY IN MEDIA PRICING

WFA GLOBAL OVERVIEW: MEDIA COST INFLATION/ DEFLATION YOY%



A hand in a blue suit sleeve is shown holding a gold coin. Below the hand, an open book lies on a wooden table, with several stacks of gold coins placed on its pages. The background is a blurred outdoor scene with a blue sky and a body of water.

## THE CLIENT-AGENCY RELATIONSHIP IN 2021 WILL LOOK CONSIDERABLY DIFFERENT

Over 80% of recent WFA survey respondents plan to review their marcomms operating model

- › Fast evolving media consumption habits
- › Increased investment on e-commerce & technology in short term
- › More agile marcomms processes
- › Less premium inventory in certain key channels
- › Access to agency talent rising up the agenda

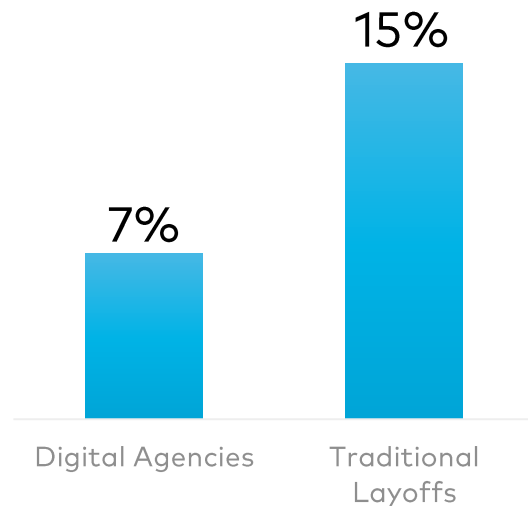


# AGENCY UPDATE

# FINANCIAL PRESSURES ARE MOTIVATING AGENCIES OPERATIONAL CHANGE

## TRADITIONAL AGENCIES HIT HARD

% Volume of Layoffs



## IN-HOUSING ELEMENTS

# 68%

- › WFA member survey, 68% expect to in-house in the next 3-5 years

## FOCUS ON DIGITAL AND OTHER SERVICES



- › Client budget reductions & requirement of digital lead staff are initiating compensation reviews

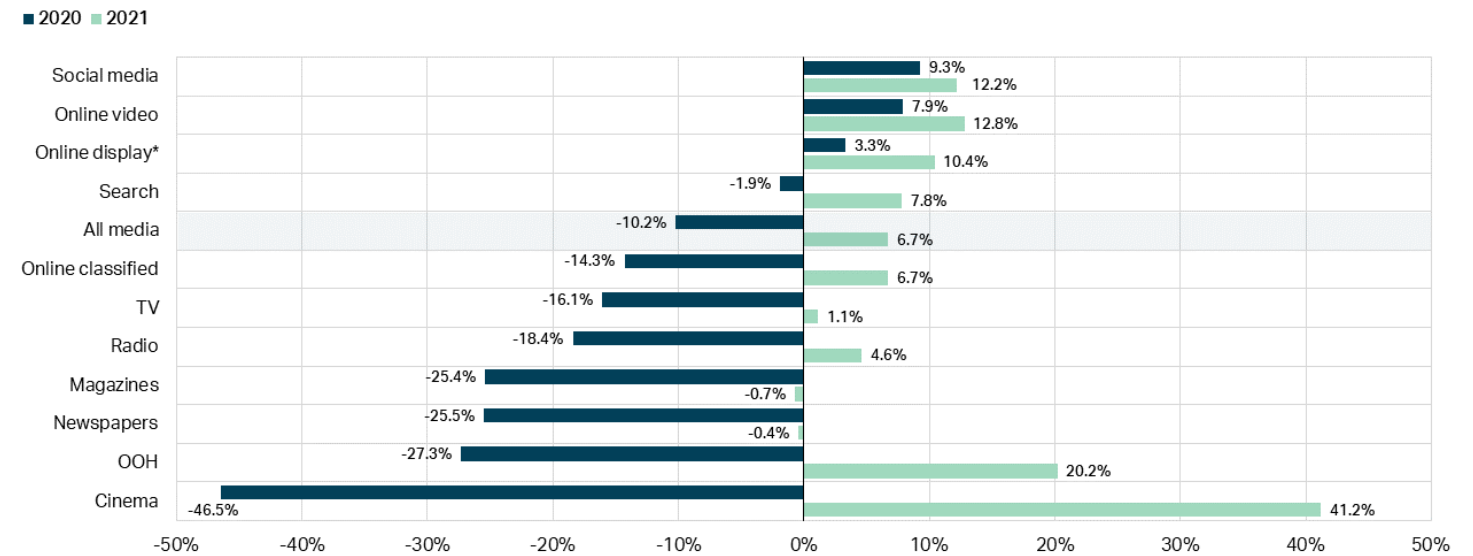
# WHILE GLOBAL MEDIA SPEND FORECASTS ARE DOWN, IT IS PRIMARILY AT THE EXPENSE OF NON-DIGITAL MEDIA

"The coronavirus forced brands to embrace digital advertising even faster than expected and made digital transformation of businesses more urgent than ever. This year will be the first in which digital advertising will attract more than half of Total global ad-spend, a milestone we previously expected in 2021."

JONATHAN BARNARD,  
ZENITH'S HEAD OF FORECASTING

## Global, Advertising investment forecast

Year-on-year % change, US\$ Nominal



Note: Data are net of discounts, include agency commission and exclude production costs. Online display includes social media and online video.  
SOURCE: WARC Data, Global Ad Trends: State of the Industry 2020/21

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## AGENCIES HAVE RETHOUGHT HOW THEY OPERATE

*We've had to look at everything, such as talent and production contracts, and review almost every way we work.*

HARRIS DIAMOND,  
CEO OF MCCANN  
WORLD GROUP



*We will have to come with outcome-based solutions if we want to be their partner and stand a chance against the walled gardens, which is why at Publicis we are creating new products and services to help our clients with these heightened pressures for performance and growth.*

ARTHUR SADOUN,  
CEO OF PUBLICIS  
GROUPE



*We have produced work in 4 days that could have previously have taken 4 months.*

MARK READ,  
WPP CEO



## MERGERS, CHANGES IN OPERATING STRUCTURES

- › Award show entries banned
  - › 2020 salary increases postponed
  - › Board suspended the buyback funded by last years Kantar Sale
  - › Tiered Salary sacrifice and Furloughs enacted:
    - › > \$300k– 20%
    - › \$200–300k – 15%
    - › \$100–200k – 10%
  - › 5,000 at WPP – job losses
  - › WPP pay annual bonuses despite COVID-19
- Q3 Financial Reports:
- › Resilient performance in a challenging environment
  - › Tight cost control
  - › Strong new business momentum
  - › Global Integrated Agencies: Media Leading The Recovery
  - › Public Relations: Best-performing Segment
  - › Specialist Agencies: Slower Recovery
  - › Grey-AKQA merger
  - › Karen Blackett announces new client centric operating model in UK

## DENTSU TO CONSOLIDATE OPERATIONS INTO SIX GLOBAL AGENCIES

- › Dentsu Aegis Network merging Dentsu & mcgarrybowen = Dentsumcgarrybowen.
- › The merger of iProspect & Vizeum (UK)
- › Dentsu is reorganising its operations into four operating pillars after deciding to consolidate its brand agencies into 6 Global Leadership brands within 2 years
- › Dentsu is to cut one in eight jobs across the agency group or around 12.5% of staff ~ 6,000 jobs, scale of the cuts would vary by market as part of a major restructuring
- › Jobs cuts and other changes should save more than £400m on an annual basis from the end of 2021.
- › The new plans will be announced in February 2021.
- › Dentsu had also announced it expected a further 2% revenue drop to its FY results ending 31 December 2019, and more than a 5% cut to underlying operating profit.
- › Dentsu was the worst performer of the big six global agency holding companies in Q3, behind Interpublic, Publicis Groupe, WPP, Omnicom and Havas

"We simply have too many brands almost, 300 across both Japan and internationally,

This radical new structure will be more logical and transparent for our clients, enabling us to serve them better."

It will also be operationally more efficient and allow the firm to "reduce costs significantly."



Toshihiro Yamamoto, president and chief executive officer at Dentsu Group.

## AN INTEGRATED MODEL WITH PUBLICIS SAPIENT & EPSILON PROVIDING A UNIQUE COMPETITIVE ADVANTAGE

- › Implemented a 500M€ cost reduction plan
- › Redundancies across 5,000 UK agencies, across: Creative, Media, Health, Production and PR shops

### OFFER CLIENTS OPPORTUNITIES IN COVID-19 TIME AND BEYOND

- › Data Platform: to build, enrich and connect our client data assets with first party data
- › Personalised content; that can deliver ground breaking creativity adapted to real time consumer experiences
- › A leadership position in media in the US to activate this personalised content at scale and optimise reach, whatever the channel
- › Technology to create direct Channels with customers in a marketplace where our clients are constantly challenged by D2C brands

### THREE STRUCTURAL COMPETITIVE ADVANTAGES

- › Global Delivery Centres: over 10,000 experts with several hubs around the world
- › Country model: resource management tools at local level and centralised support functions
- › Marcel: 65k active users (80% of employees), 10 M data points, 30k modules of e-learning, case studies & development courses

## OMNICOM GROUP CONDUCTS LAYOFFS ACROSS AGENCIES

- › Despite its strength as a network; Omnicom appears to have brought the hammer down the hardest: Layoffs include; Greg Hahn as Chief Creative officer at BBDO New York and Exec VP-Director of Integrated Production Dave Rolfe
- › TBWA, Zimmerman and DDB were impacted as well.
- › Forgoing award shows and industry events across the company
- › Freezing new hires and salaries
- › Furloughs/ layoffs confirmed across "many" agencies; DDB, BBDO amongst the largest (US)
- › Redundancies include ~ 6,100 overall
- › Omnicom Media Group launches sport and entertainment practice, Fuse, in Asia-Pacific
- › Acquisitions : Credera acquired a majority stake in London-based DMW Group. DMW is a leading independent technology consultancy, specializing in the design, delivery, and implementation of data and digital transformation programs

## IPG HAS FORGONE A SWEEPING TOP DOWN PLAN INSTEAD HANDLING COST CUTTING AT THE AGENCY LEVEL

- › Top level execs taking voluntary salary sacrifice
- › MullenLowe first redundancy casualties – 1/3 of employees in Boston impacted
- › 10% of staff at Deutsche Los Angeles have either been laid off or furloughed
- › 10% of R/GA US has been made redundant
- › McCann NY earning >\$60K taking 10% pay cut to protect jobs
- › Foundation for sustained value creation in top talent, strong agency brands and key strategic initiatives
  - › Quality of agency offerings
  - › Integrated digital and digital specialists
  - › Open architecture" solutions
  - › Data management at scale
- › Continued investment in leading talent, tools and services
- › Effective expense management an ongoing priority
- › Financial strength an ongoing source of value creation

## HAVAS GROUP ANNOUNCES NEW STRATEGIC PLAN: "MAKING A MEANINGFUL DIFFERENCE"

- › The nature of Havas' ownership model with Vivendi allowed it to hold off on the layoffs – however reports show Layoffs have occurred: 150 employees across Havas Media, Arnold and other offices in New York, Boston and Chicago
- › Havas Health & You announced two top tier hires
- › Acquisition of battery: a highly-acclaimed, culture-driven creative agency based in Los Angeles with a specialized focus on gaming, television, movies and streaming TV services. Battery will become part of the Annex and be renamed Battery Annex. The acquisition gives the Annex a larger presence in the Los Angeles creative community and enhances its capabilities around gaming and streaming entertainment.
- › The Group remains confident in the resilience of its main businesses. It continues to make every effort to ensure the continuity of its activities and best serve and entertain its customers and audiences while complying with the authorities' guidelines in each country where it operates.

## HAVAS GROUP ANNOUNCES NEW STRATEGIC PLAN: "MAKING A MEANINGFUL DIFFERENCE"

The Group has identified four key competitive advantages to ensure the success of this new positioning and maintain its position as the most integrated group in the industry:

- › A new common business methodology designed to make brands meaningful, that is being implemented across Havas' Creative, Media, and Health businesses.
- › The Group's talent strategy will focus on continuing to evolve talent programmes and initiatives that enable Havas to be the most meaningful place to work.
- › Havas' integrated Village model that will continue to provide clients with seamless and agile business solutions.
- › The power of Vivendi, that gives Havas an unmatched access to meaningful content and will continue to be a driving force of the Group. To support this ambition, further development of the Annex, Havas-Vivendi's shared fast-growing network designed to help brands tap into digital and millennial culture; through the acquisition of Battery and the launch of Annex Bastille, where cultural influencers from Havas and from the broader Vivendi environment will bring their expertise to brands.

As part of this new strategic plan, Yannick Bolloré also underlined the need for Havas to set the example by being a meaningful group itself, and announced a series of new commitments, starting with gender equality, workplace harassment training and environmental responsibility.

## IN-HOUSING TRENDS

# WHILST TRENDS SUGGEST IN-HOUSING IS RISING, COVID-19 COULD DRIVE ADVERTISERS BACK TO EXTERNAL AGENCIES;

“

*While we've seen a steady march towards in-housing, Covid-19 is causing a rethink. Brands are having more open discussions with agency partners and looking for more flexible options. We've always sounded a word of caution to brands looking to fully move to in-housing and this is a good opportunity to rethink and consider all options. In-housing is not a black or white decision – there are different pros and cons for marketers depending on their strategy, focus, scale and complexity.*

*Coronavirus has amplified the need for a robust business case for in-housing, as well as an environment ripe for fresh thinking. While the motivation for some brands is to take control, there are simpler ways of achieving this outcome without additional risk.*

*As flexibility and agility accelerates, brands are revisiting alternatives to in-housing. Agencies have retooled their approach in light of leaner marketing budgets and faster planning and production cycles. The end result may be a healthier agency ecosystem that delivers the flexibility, and results, brands require.*

DIVERSITY & INCLUSION

# 'LONG ROAD AHEAD': AD AGENCIES ARE RELEASING DIVERSITY DATA – AND ADMITTING THEIR SHORTCOMINGS

600 & Rising securing the backing of the 4A's, has gotten 30-plus agencies-and counting- to commit to compiling and releasing this diversity data, including such high profile shops as Wieden+Kennedy, R/GA and 72andSunny.

### Representation

**US EQUAL EMPLOYMENT OPPORTUNITY (EEOC) COMMISSION DATA**  
EEO Sector Data 2018 / Dentsu Aegis US Representation 2020

	Black or African American	Asian	White	Hispanic or Latino	Two or More Races
Executives	2.4% / 1.8%	10.2% / 7.1%	82.8% / 83.4%	3.6% / 3.6%	1.0% / 4.1%
Management	4.8% / 2.5%	15.3% / 9.2%	72.9% / 81.5%	5.4% / 5.1%	1.5% / 1.7%
Professionals	6.8% / 6.9%	18.1% / 11.5%	66.7% / 71.6%		

EEO Sector: Professional, Scientific, and Technical Services category includes advertising, professional services such as law firms, ac

**U.S. EQUAL EMPLOYMENT OPPORTUNITY COMMISSION (EEOC) DATA**  
EEO-1 SECTOR DATA 2018\* / INTERPUBLIC GROUP REPRESENTATION 2019

	BLACK OR AFRICAN AMERICAN	ASIAN	WHITE	HISPANIC OR LATINO
SR./EXECUTIVE LEVEL MANAGERS	2.4% / 2.6%	10.1% / 5.5%	82.5% / 84.9%	3.6% / 5.2%
FIRST/MID-LEVEL MANAGERS	4.8% / 4.3%	15.2% / 9.4%	72.5% / 76.8%	5.4% / 7.1%
PROFESSIONALS	6.7% / 7.2%	18.0% / 11.4%	66.4% / 68.7%	6.3% / 9.2%

Professional, Scientific, and Technical Services\*\* category, which includes advertising, as well as professional services accounting firms and management consultants, and is the most recent data available from the EEOC.

**Our Global Gender and U.S. Race and Ethnicity Data, as of the end of Q1 2020**

GENDER	Network Totals	Network Leadership**	US Totals	Portland Totals	Portland Leadership***	Portland Creatives	New York Totals	New York Leadership***	New York Creatives
Femate*	54%	66%	56%	54%	46%	36%	57%	47%	38%
Male*	46%	34%	44%	46%	54%	64%	43%	53%	62%

DIVERSITY & INCLUSION

'URGENT NEED': AGENCIES ARE DEPLOYING DIVERSITY & INCLUSION EXECs, FORMING NEW COUNCILS TO CREATE MORE EQUITABLE COMPANIES



Are currently seeking diversity & inclusion execs



Consultants to help improve the hiring process as well as overall company culture.



Named Danny Robinson its first Black Chief Creative Officer



Innocean & Muhtayzik / Hoffer are leaning on internal committees to create new policies to better the agencies' diversity & inclusion



Appointed its first chief diversity, equity & inclusion officer



Havas announced its appointments for its new diversity, equity and inclusion committee



Appointed Christena Pyle of Time's Up its first chief equity officer of the Americas.



WPP / GroupM: Allyship training

## SUSTAINABILITY

# AN INCREASING NUMBER OF MAJOR BRANDS HAVE SET CLEAR & AMBITIOUS SCIENCE BASED TARGETS – ZERO NET CARBON





“Dentsu International has always been an industry-first mover and I’m thrilled that we are able to join those leading brands, many of whom are our clients, that have also pledged to achieve net zero emissions by 2030.”

- Wendy Clark, global CEO, dentsu international

**dentsu**



### HAVAS GROUP COMMITS TO CLIMATE ACTION. LAUNCH OF INITIATIVE FOR CARBON NEUTRAL PRODUCTIONS




**Net zero**  
carbon emissions  
in our Campuses  
by 2025

#### Strategy

- In 2020, following the early achievement of 2030 targets under our existing environmental action plan, the Group joined the Science Based Targets initiative (SBTi), to set new targets by 2030, aligned with the scenario 1.5°C of the Paris Agreement. This will mean reducing drastically our emissions by nearly 50% and be carbon neutral before 2030.



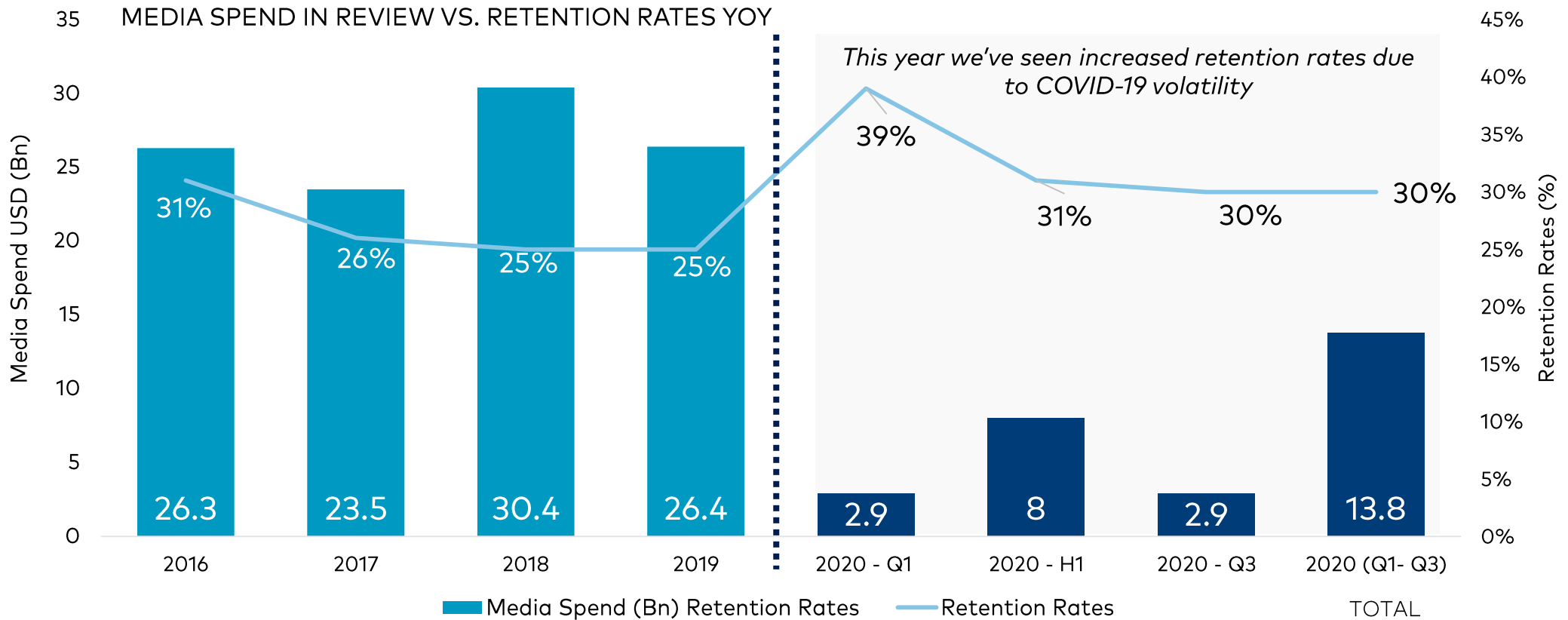
**PUBLICIS GROUPE**

A modern office interior with large glass walls and black frames. The space is bright and open, with a white sofa and a yellow chair visible through the glass. A blue circular overlay is positioned on the right side of the image, containing white text.

# How COVID-19 has impacted the Agency Selection Landscape

THE AGENCY SELECTION LANDSCAPE '20

THIS YEAR \$13.8 BN HAS BEEN REVIEWED;  
\$4 BN LESS THAN IN Q1-Q3 2019



THE AGENCY SELECTION LANDSCAPE '20

ZENITH, STARCOM & MINDSHARE  
DEMONSTRATE THE HIGHEST RETENTION RATES

Media Agency	Total Spend Reviewed \$	Total Losses \$	Total Retained \$	Retention Rate %
Zenith	831	235	596	72%
Starcom	861	246	615	71%
Mindshare	829	246	583	70%
Mediacom	316	103	213	67%
Wavemaker	578	208	370	64%
Havas Media	793	291	502	63%
Dentsu X	126	53	73	58%
Initiative	225	122	103	46%
Carat	635	411	224	35%
OMD	975	686	289	30%
Arena Media	17	12	5	29%
Spark Foundry	710	513	197	28%
Vizeum	160	123	37	23%
UM	339	283	56	17%
PHD	901	842	59	7%
Hearts & Science	11	11	0	-

Media Agency	Total Spend Reviewed	Total Losses	Total Retained	Retention Rate %
GroupM	1 756	590	1 166	66%
Havas Media Group	855	303	552	65%
Publicis Media	2446	1006	1440	59%
Dentsu	1021	659	362	35%
MediaBrands	640	480	160	25%
Omnicom Media (OMG)	1887	1539	348	18%

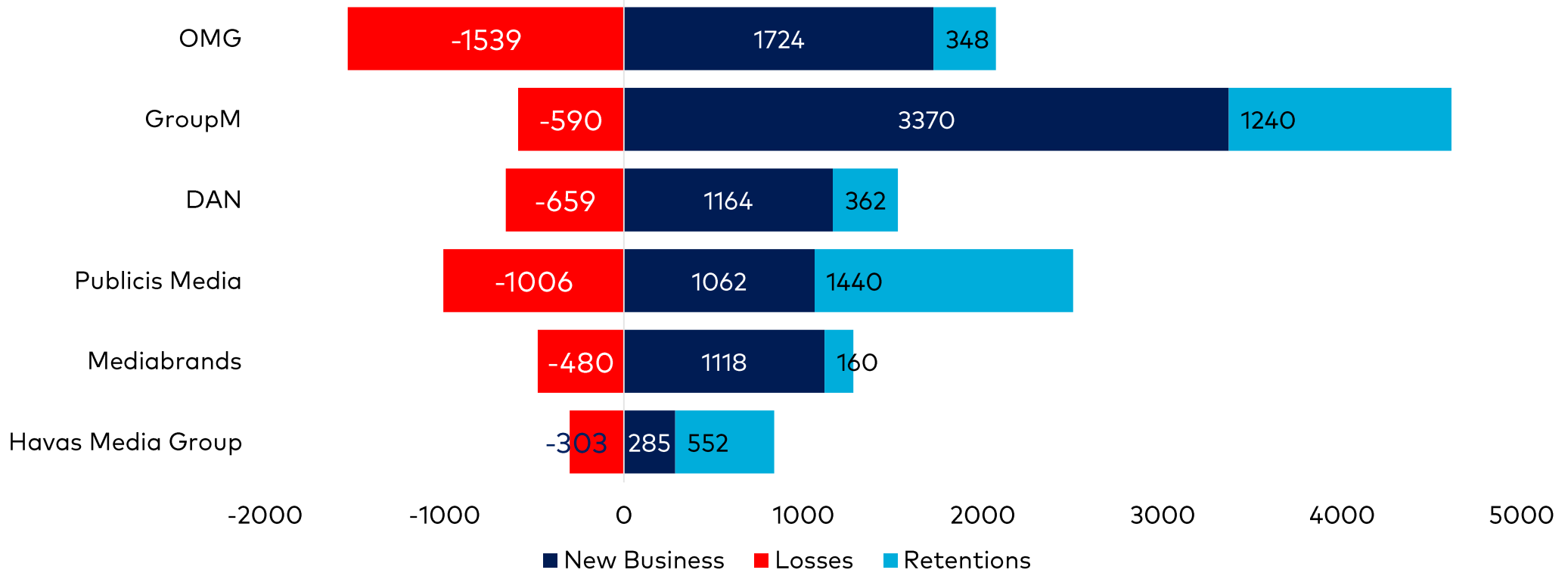
THE AGENCY SELECTION LANDSCAPE '20

GLOBAL NEW BUSINESS RANKING: MEDIA AGENCY GROUP

Based On Total New Business Values New Client Wins + Retentions -Losses

TOTAL NEW BUSINESS VALUE INCL. RETENTIONS BY AGENCY GROUP 2020 (H1)

Billings in \$ US M



THE AGENCY SELECTION LANDSCAPE '20

MAJOR GLOBAL & MULTI-COUNTRY MEDIA REVIEWS IN 2020 Q1- Q3

DIAGEO

*Telefonica*

SEPHORA

DURACELL®

KraftHeinz

CIRCLE K

BBVA

PANDORA

DIRECTV

Whirlpool

WW

LONGCHAMP  
PARIS

Intersnack

Hasbro

Emirates

Energizer

AIRFRANCE

DeLonghi

VELUX®

THE AGENCY SELECTION LANDSCAPE '20

GLOBAL NEW BUSINESS RANKING: MEDIA AGENCY GROUP

Breakdown of the Total New Business Values between New Client Wins, Losses and Retentions

AGENCY	\$\$	WINS (\$ USD)	LOSSES (\$ USD)	RETENTIONS \$ USD
Wavemaker	1143	981	-208	370
Mediacom	1004	894	-103	213
Mindshare	992	655	-246	583
Starcom	786	417	-246	615
Zenith	623	262	-235	596
Initiative	613	632	-122	103
OMD	502	899	-686	289
Havas Media	479	268	-291	502
Carat	328	515	-411	224
Dentsu X	250	230	-53	73
UM	230	457	-283	56
m/Six	128	132	-4	-
Essence	103	109	-6	-
Hearts & Science	87	98	-11	-
Arena Media	4	11	-12	5
Vizeum	2	88	-123	37
PHD	-59	724	-842	59
Spark Foundry	-229	87	-513	197

## PREVIOUS PITCHES REVOLVED AROUND ADVERTISERS' CONCERNS AGENCIES TRANSPARENCY

Whereas previous pitches revolved around advertisers' concerns over how agencies transparency, now there's a greater focus on redefining what agencies do

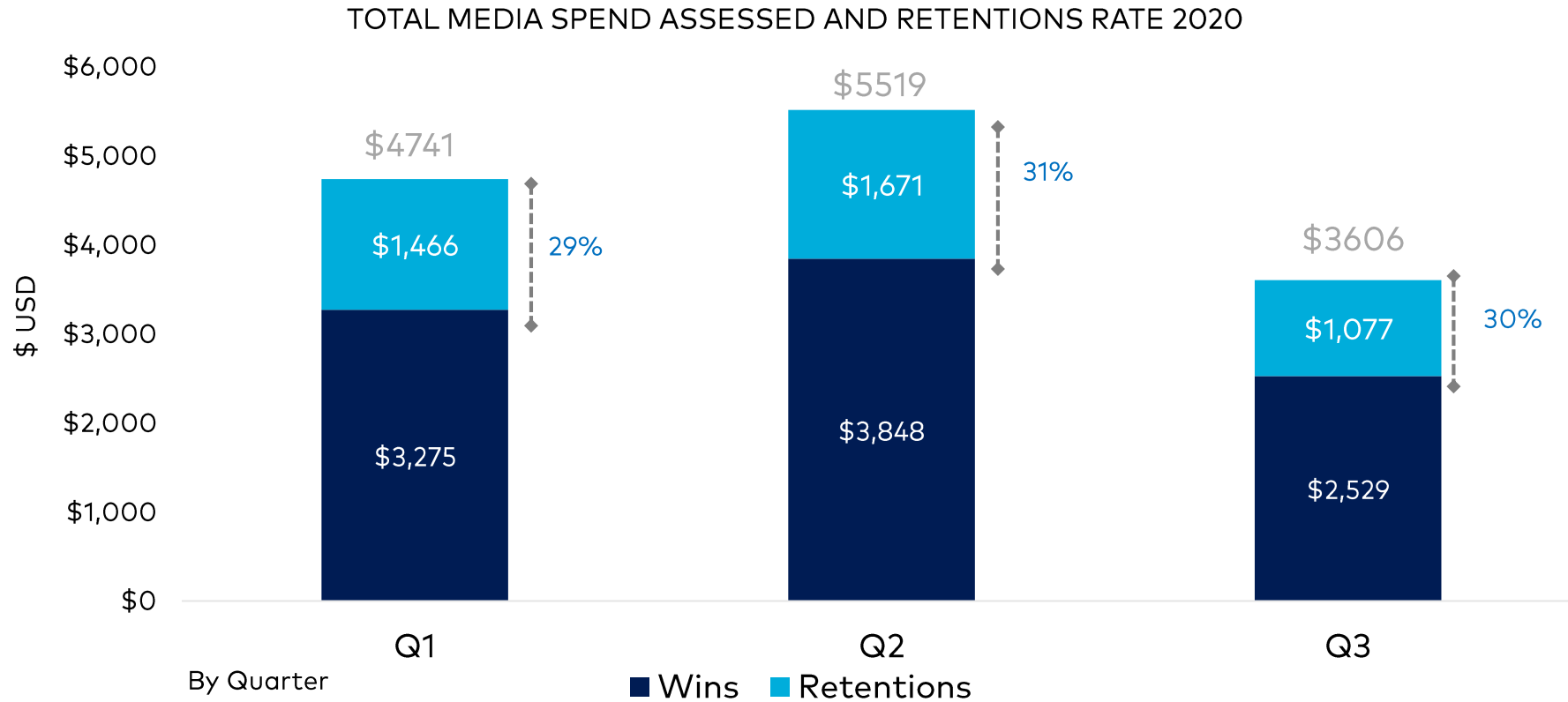
With so much financial and civil unrest, advertisers are marketing in a faster-moving marketplace, that means two things:

- #1** Advertisers need more insights into shifting media and consumer trends they can exploit to generate better awareness and engagement
- #2** Advertisers *need* flexibility to adapt media plans in response to shifting media trends

Having said this *commercials* will still have a large focus within negotiations as advertisers rush to reduce expenditure across all marketing facets.

THE AGENCY SELECTION LANDSCAPE '20

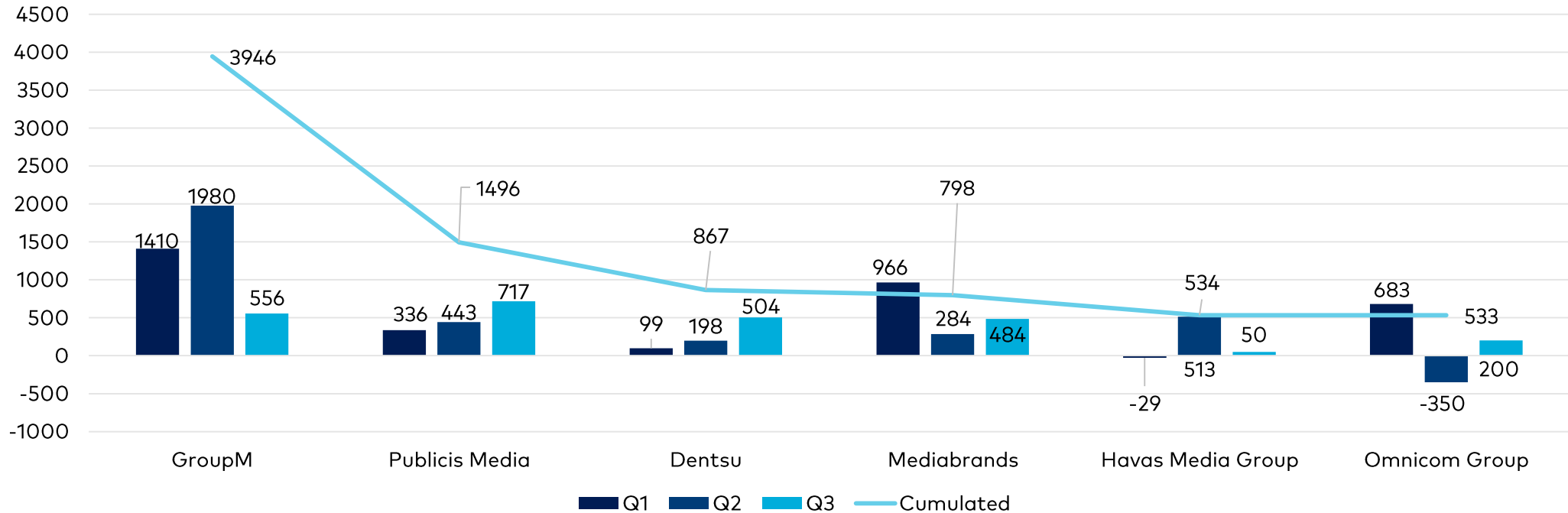
TOTAL MEDIA SPEND ASSESSED IN Q1-Q3 2020: \$13.8B



THE AGENCY SELECTION LANDSCAPE '20

TOTAL NEW BUSINESS VALUES 2020 –  
 MEDIA AGENCY GROUPS BY QUARTER  
 INCLUDING RETENTIONS

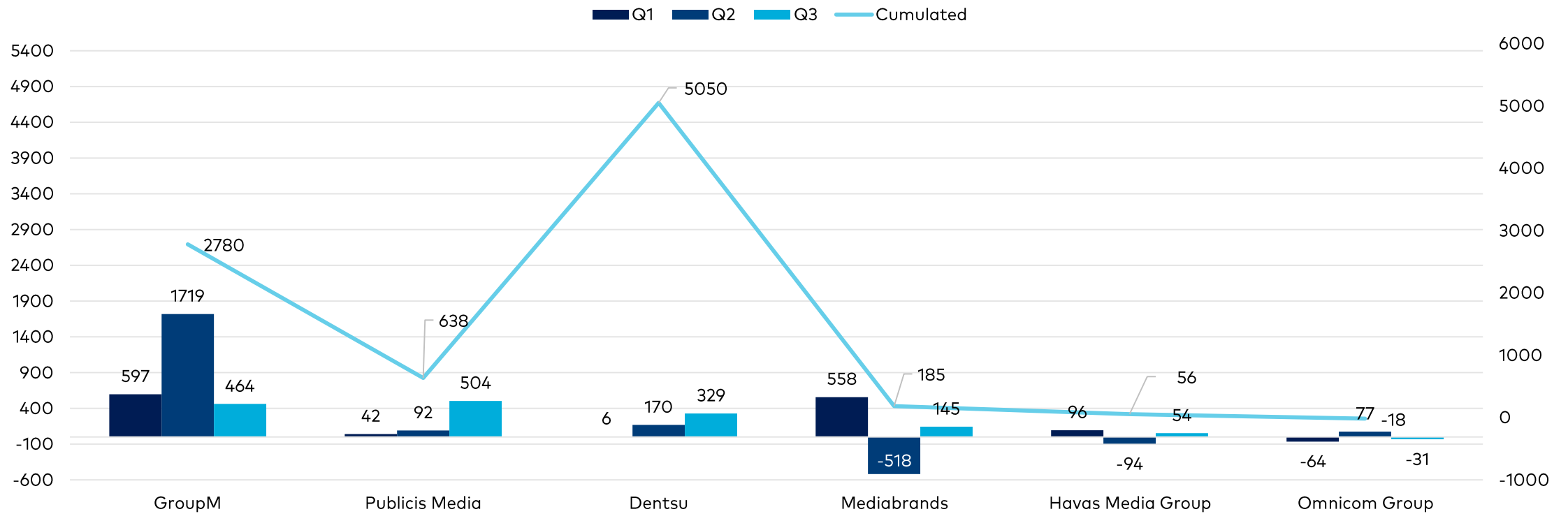
Groups Total New Business Values 2020 by Quarter (includ. Retentions)



THE AGENCY SELECTION LANDSCAPE '20

TOTAL NEW BUSINESS VALUES 2020 –  
 MEDIA AGENCY GROUPS BY QUARTER  
 EXCLUDING RETENTIONS

Groups Total New Business Values 2020 by Quarter (excluding Retentions)

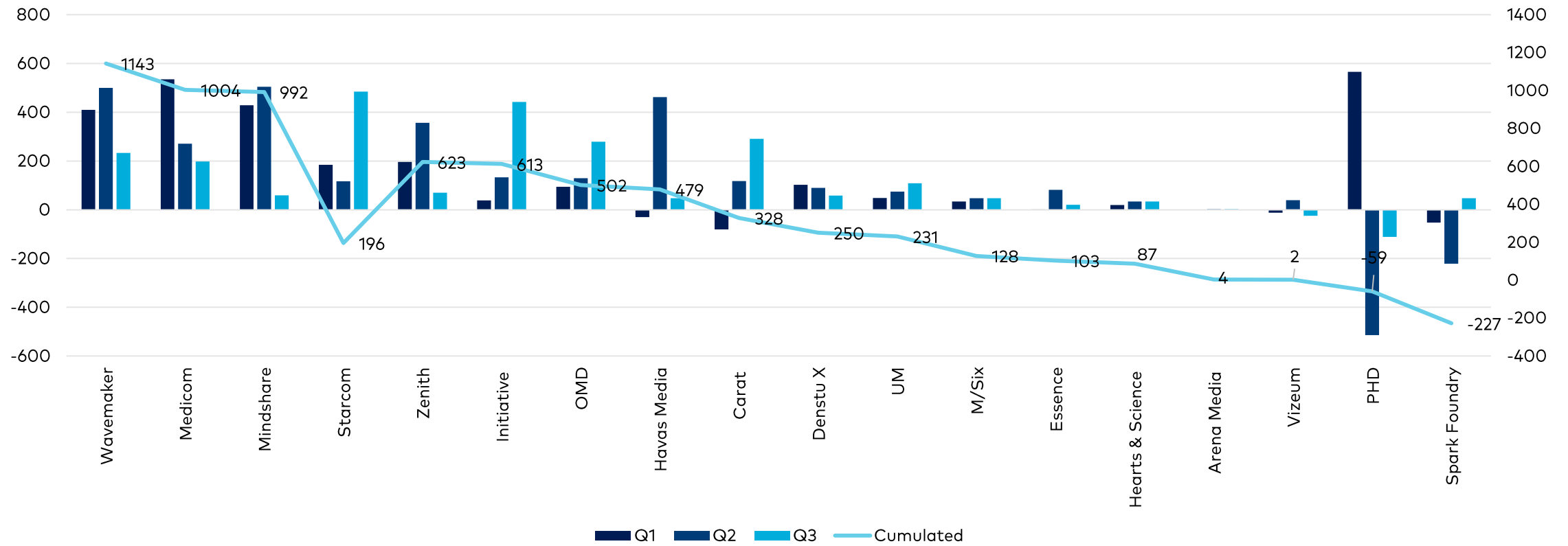


THE AGENCY SELECTION LANDSCAPE '20

# TOTAL NEW BUSINESS VALUES 2020 MEDIA AGENCY NETWORKS BY QUARTER

INCLUDING RETENTIONS

GROUPS TOTAL NEW BUSINESS VALUES 2020 (>200\$M) BY QUARTER (INCLUD. RETENTIONS)

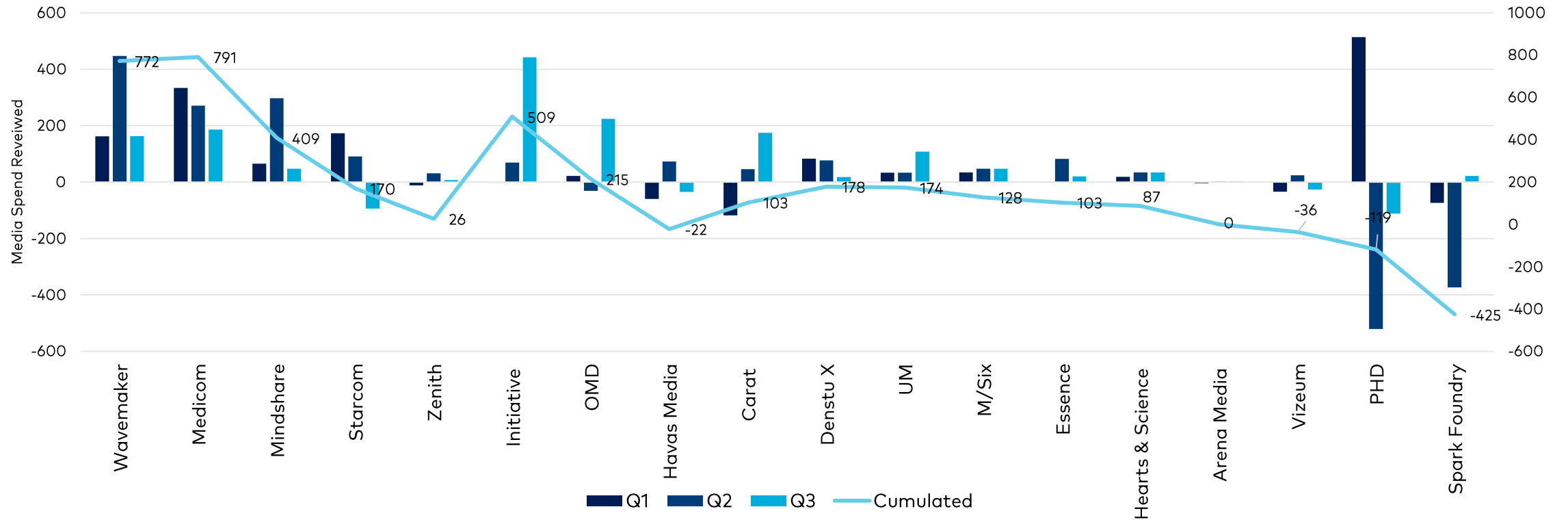


THE AGENCY SELECTION LANDSCAPE '20

# TOTAL NEW BUSINESS VALUES 2020 MEDIA AGENCY NETWORKS BY QUARTER

EXCLUDING RETENTIONS

GROUPS TOTAL NEW BUSINESS VALUES 2020 (< \$2000 M) BY QUARTER (EXCLUDING RETENTIONS)





*"a constraint should be regarded as a stimulus for positive change—we can choose to use it as an impetus to explore something new and arrive at a breakthrough.*

Adam Morgan,  
A Beautiful Constraint

The current environment of virtual pitches provides an opportunity to witness how an agency operates and innovates under unique constraints

## FINAL THOUGHTS...

### DIGITAL TRANSFORMATION AGE IS NOW

- › Greater investment in digital required to reach various audiences
- › Digital talent is key – upskilling is required to keep teams updated

### CLIENT-AGENCY RELATIONSHIPS ARE MORE IMPORTANT THAN EVER

- › Understand and value the return on relationships, not just the return on investment
- › Build a better understanding with your partners

### DIVERSITY & INCLUSION ARE INTEGRAL TO SUCCESS

- › Changing consumer trends, means you require a greater mix of agile, strategic talent & executional team members
- › Diversity will play a larger role in understanding and building relationships with consumers



Thank you for your time.

About Ebiquity

We are a leading [independent](#) marketing and media consultancy

Our focus is on helping brands make better informed marketing investment decisions

If you have any other further questions please feel free to contact me:

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