

THE WHITEWASHING OF THE TOTAL MARKET APPROACH AND WHY IT MATTERS TO BLACK LIVES

**A CALL TO ACTION TO
REFRAME MADISON AVENUE**

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CORPORATE AMERICA AND ITS RELATIONSHIP WITH THE MADISON AVENUE ECOSYSTEM

In 1968, Mr. James Brown, known as the “Godfather of Soul” released Say It Loud: I’m Black and I’m Proud! The song itself was a protest anthem during the Civil Rights Movement. At that time, Corporate America was struggling with the very idea of moving away from a segregated workplace and marketplace to an integrated marketplace and workplace. For Black America, the protest song was about Black dignity, self-determination and Black Nationalism. It was also a practice in self-naming, as many Black people at the time were not referenced as Black or African American. The protest song would instill pride to Black Americans and Black business owners, alike.

The 1960s also marked the expansion of what is now referenced as Madison Avenue. Madison Avenue is a reference for a street in New York City where advertising and media agencies established their offices in the 1950s. Today it is a term meant to represent the marketing and communications industry and its service providers. Madison Avenue in the 1960s closely resembled the American show *Mad Men* (2017) where the stories were predominantly white- and male-centered. Corporate America and Madison Avenue created an industry where advertising and media companies made iconic brands memorable through the use of television, radio, out-of-home, and print commercial campaigns. For Corporate America, Black people were an emerging new middle class for the first time and predicted to grow as a human resources talent pipeline. For the first time, Black students were being integrated into public schools and universities. Unfortunately, for Madison Avenue and its ecosystem, it would be another 30 years before the largest industry association for Corporate America’s brands became integrated.

THE FORMATION OF THE MADISON AVENUE ECOSYSTEM

Since its inception, Corporate America and Madison Avenue had a consensual relationship. The Association of National Advertisers (ANA) was founded in 1910 in Detroit, Michigan, and now resides in New York City. ANA’s membership includes over 600 companies with 25,000 brands that collectively spend over 400 billion dollars in marketing and communications. At the time of their formation, their mission, vision and values were to support brands with a focus on “general market” audiences. Similar to the ANA, agencies on Madison Avenue established an industry association who supplied services to Corporate America’s brands: The American Association of Advertising Agencies (4A’s). Today the U.S. trade association and advertising agencies, founded in 1917, serve over 700+ member agencies across 1,300 offices, and control more than 85% of total U.S. advertising spend.

The two industry associations (ANA and 4A’s) partnered in 1936 to form The Advertising Research Foundation (ARF), a nonprofit industry association for creating, aggregating, and sharing knowledge in the fields of advertising and mass media. It’s their stated mission is to improve the practice of advertising, marketing, and media research in pursuit of more effective marketing and advertising communications. Its membership consists of over 400 advertisers, advertising agencies, research firms, media companies, educational institutions, and international organizations.

What this meant for Black business on Madison Avenue and their lives as professional service providers within the marketing and communications industry was that three industry associations set policy, education, standards, and guidelines for how Corporate America would buy services that primarily support “general market” audiences. Because of this economic exclusion of more than 60 years, the financial gap within the \$400B US industry shows less than 3% of Corporate America’s spend for Black- and minority-owned businesses on Madison Avenue.

Many Black-owned media and advertising firm owners on Madison Avenue believe the illusion of fair and equitable economic opportunities from Corporate America will never be a reality because the structure created by the Madison Avenue Ecosystem—The ANA, 4As, and ARF —was not created structurally for Black-owned businesses on Madison Avenue. Some on Black Madison Avenue even question how the very same industry associations can be disruptive and self-correct a wrong that they had a “hand in creating”?

THE INTEGRATION OF THE MADISON AVENUE ECOSYSTEM

After decades of mounting pressure to integrate the Madison Avenue Ecosystem, in 1999 the ANA decided to include Black, Hispanic, and Asian audience education, advocacy and content for Corporate America. However, the Madison Avenue Ecosystem followed a similar model that Corporate America chose with a structured approach to buying professional services from Black Madison Avenue and segregated their conference by forming two separate content tracks for Corporate America’s marketing professionals: the Masters of Marketing (general audience) and Multicultural (multi-ethnic audiences). The 4As and ARF would follow the separate conference track approach established by the ANA as well, further widening the economic gap between Madison Avenue and Black Madison Avenue.

THE PROBLEM: FOLLOW THE MONEY ON MADISON AVENUE

In 2000, Madison Avenue agencies were being merged and acquired to create what we know today as the Holding Company Model. The formation of the Big Four holding companies, WPP, Omnicom, Publicis Groupe, and Interpublic Group now account for a significant revenue share on Madison Avenue. For Corporate America, this meant global scale and efficiencies were realized because until the industry consolidation, Madison Avenue was very fragmented and regionally based. For Black Madison Avenue providing services for Corporate America, the wall to climb in getting Corporate America's contracts got even higher and created additional barriers for closing the gap between Madison Avenue and Black Madison Avenue.

The consolidation within the industry by the Holding Company model and Corporate America's appetite for global market share at scale accelerated the near-death of Black Madison Avenue. Also during this time was the emergence of a Digital Madison Avenue chartered by the creation of Facebook, Apple, Amazon, Netflix, and Google (FAANG).

To make matters worse for Black Madison Avenue, there was a shifting agenda and content for members at the ANA, 4As and ARF towards growing Hispanic Madison Avenue as an answer to the rising majority-minority demographic shifts. The message from Corporate America was that they could only spend against one ethnic audience at a time, and this meant further headwinds for Black Madison Avenue.

Corporate America's spending and the role of industry associations on Madison Avenue led to the death of many Black-owned businesses on Madison Avenue. Did Black-owned business owners contribute to their own demise in some cases? Absolutely. However, the structural barriers and the inter-relationships between Corporate America and industry associations did not make it easy then just as it does not make it easy today.

According to the US Census, Hispanics, Blacks, and Asians account for nearly 40 percent of the population, and on a good day, Corporate America invests less than three percent annually on Black Madison Avenue.

TOTAL 2018 U.S. MEDIA REVENUE BY ETHNICITY

U.S. Census	% of Population	Media Revenue (%)	Total Media Revenue
White	62.7	94.64%	\$456,563,712,000
Hispanic	18.1	3.72%	\$17,940,000,000
Black	13.4	1.49%	\$7,200,000,000
Asian	<u>5.8</u>	<u>0.15%</u>	\$722,000,000
Total	100%	100%	\$482,425,712,000

FIGURE #1
SOURCE: PQ MEDIA AND AIMM

Demographers say by 2042 there will be a New America where, for the first time, racial minorities will become the New Majority population. What does this mean for Corporate America and industry associations on Madison Avenue? There has to be a monumental change to the structure of how Corporate America funds the Madison Avenue Ecosystem. Industry Associations like the ANA, 4As, and ARF must, in the words of Ronald Regan in his Berlin speech, "Tear down this wall" that exists between Madison Avenue and Black Madison Avenue and how Corporate America buys professional services, content, education, advocacy, and programming from the latter. If not, the \$388 billion economic exclusion gap created by Corporate America and Madison Avenue over the last 60 years will not close

THE SOLUTION: A CALL FOR CORPORATE AMERICA AND MADISON AVENUE TO CHANGE

In the mid 1960s when Corporate America began reckoning with the realization that America was going to become an integrated, multi-ethnic society, many CEOs turned to their change management consulting partner to get their help in figuring out how the change would impact their enterprise organizations.

In 1966, McKinsey introduced a topic and white paper--The Changing Face of America--where the idea of a Total Market was mentioned. Within their white paper there was no definition for Total Market, nor a change operating approach for how CEOs could transform Corporate America for Black America. For CEOs it was a decision to look through the lens of a Total Addressable Market (TAM) or choose curing America's problem through an Ethnic-focused approach. Corporate America chose to pursue the practice of Ethnic Marketing (Multicultural Marketing) as their approach for integrating their corporate marketing practices. Since that decision, America became what it is today.

In November 2010, Ogilvy and Mather - a "general market" agency and a founding member of "Madison Avenue" re-introduced the McKinsey Total Market topic and definition to more than 2,000 attendees at one of the largest industry association conferences for Corporate America's brands at the ANA Multicultural Conference. The Total Market topic is a term introduced in the late 1960s that is used to describe how businesses address a total addressable market. The Total Market topic is a marketplace change approach within an emerging industry vertical where goods and services reflect the total addressable market.



FIGURE #2
SOURCE: MCKINSEY QUARTERLY

OGILVY & MATHER’S INNOVATION AGENCY, OGILVYCULTURE, BEGAN MAKING THE INTERNAL BUSINESS CASE FOR STARTING A NEW PRACTICE CREATING A NEW INDUSTRY VERTICAL ON MADISON AVENUE.

An industry vertical (also called a vertical market) is more specific, identifying companies that offer niche products or fit into multiple industries. Verticals are often new fields with promising companies that attract investors.

SOURCE: PITCHBOOK

Ogilvy & Mather knew that if they were to get this business case and new marketing and communications approach right, it could have a tremendous impact on Madison Avenue by removing the inequitable burden of only hiring agencies based on how they ethnically reflect the audience they are being asked to service versus how they culturally impact the New America.

By November 2010, Ogilvy had proven the market opportunity internally and were presenting on the stage at the ANA Multicultural Marketing National Conference to launch OgilvyCulture—Adland’s first cross-cultural agency, or better known today as Inclusive Customer Experience practice.

The original pitch to the ANA was for the topic to be presented at the Masters of Marketing Conference (General Market) and not the Multicultural Market Conference. They were told by ANA leadership that any topic that addresses multi-ethnic consumers has to be presented at the Multicultural Conference. This is a common practice on Madison Avenue and begs the question if Corporate America will ever enforce their DEI practices within the very industry associations they belong to and fund on Madison Avenue.

The buying approach and structure that Corporate America and Madison Avenue engage in is like “redlining”—Corporate America’s annual planning of +\$480 billion in marketing dollars for large corporate holding companies and limiting access to talented service providers on Black Madison Avenue.

A NEW INNOVATION FOR CORPORATE AMERICA AND THE MADISON AVENUE ECOSYSTEM

When OgilvyCulture introduced the new Total Market topic at the ANA Conference, there was a lot of push back from the Madison Avenue Ecosystem. For the first time, Corporate America and The Madison Avenue Ecosystem had been presented with a new way of thinking and doing since Madison Avenue formed. The agenda and framework for how to buy audience-based professional services from Madison Avenue was not separated by ethnic walls nor ethnic-only-driven decisions in Corporate America.

It was a business model that created an entire new industry vertical. It was a new language, a new topic, and a new way of uncovering cultural insights. The thesis was that if Corporate America was to become New America ready, then it required a new way of buying marketing and communications professional services as well as a new way of approaching New America.

THE CURRENT MADISON AVENUE MODEL

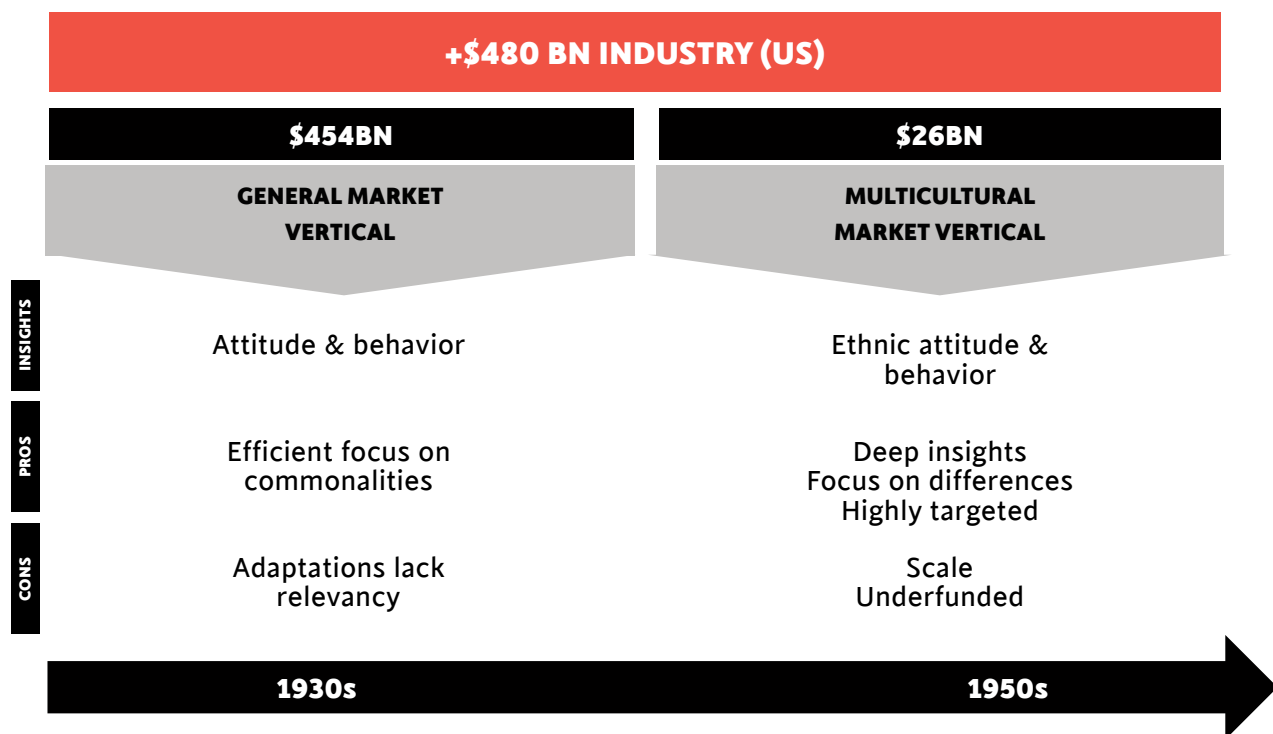


FIGURE #3
SOURCE: REFRAME THE MARKETPLACE: THE TOTAL MARKET APPROACH TO REACHING THE NEW MAJORITY

Because of this inequitable distribution of marketing spend and economic inclusion in Corporate America and Madison Avenue, many providers of services on Black Madison Avenue are severely under-resourced and it creates an inequitable experience as a provider of the service and user of the services.

THE NEW APPROACH FOR CORPORATE AMERICA AND MADISON AVENUE

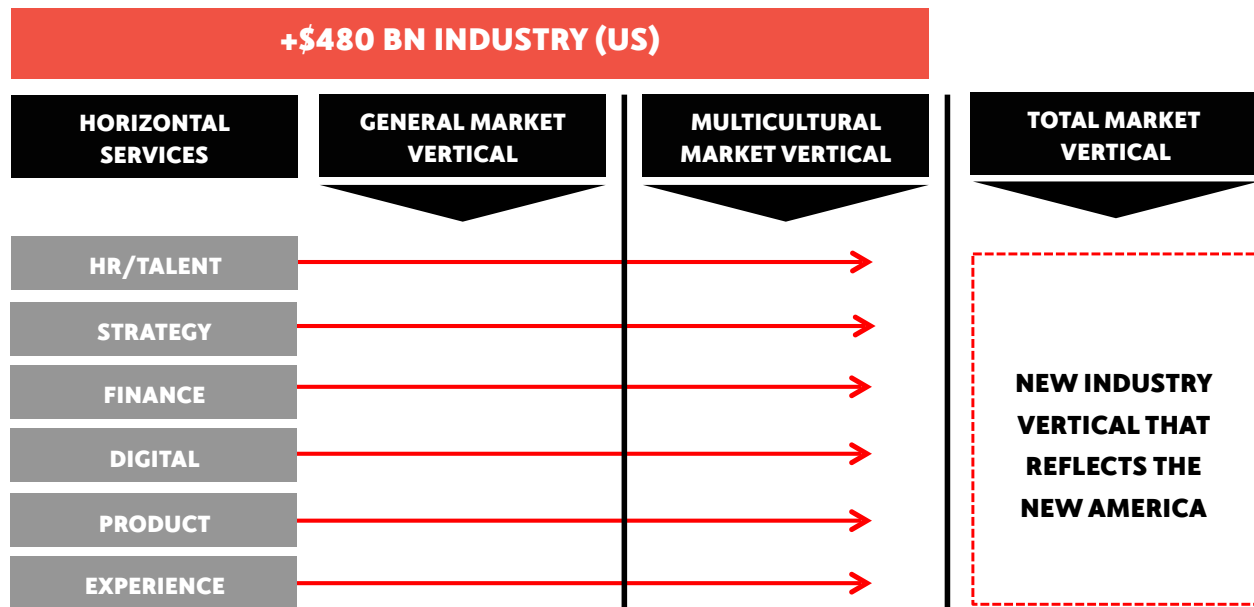


FIGURE #4
SOURCE: REFRAME THE MARKETPLACE: THE TOTAL MARKET APPROACH TO REACHING THE NEW MAJORITY

The second point of the thesis of why Corporate America and Madison Avenue needs to change to reflect the New America relates to talent. Forcing talent across every horizontal vertical market to provide services that match their ethnic make-up is not modern. If you are a researcher and Black, the assumed position is you can only provide Black consumer insights and not other ethnic consumer insights. The same is true for White, Hispanic (Latinx), Asian, and LGBTQ professionals.

A horizontal vertical market is one in which all of your customers use your product to do the same thing, regardless of what industry they are in.

What this also meant was that if you were a holding company who serviced General Market audiences, as a Black-owned business on Madison Avenue you would not get a chance to pitch the Total Addressable Market and Total Budget for using Cross-Cultural or Poly-Cultural insights.

THE WHITEWASHING OF THE TOTAL MARKET APPROACH

At the 2010 ANA Conference, Jeffrey L. Bowman, then Senior Partner and Managing Director at OgilvyCulture introduced a new industry vertical called the Total Market using the Cross-Cultural approach for insights. The belief was Corporate America and Madison Avenue could shift the way Corporate America buys marketing and communications services away from the segregated approach to one that reflects the New America.

After launching OgilvyCulture, they picked up IKEA as their charter client and later went on to validate the thinking and approach with other F500 clients. It was the industry's first Inclusive Customer Experience practice within the Total Market industry vertical.

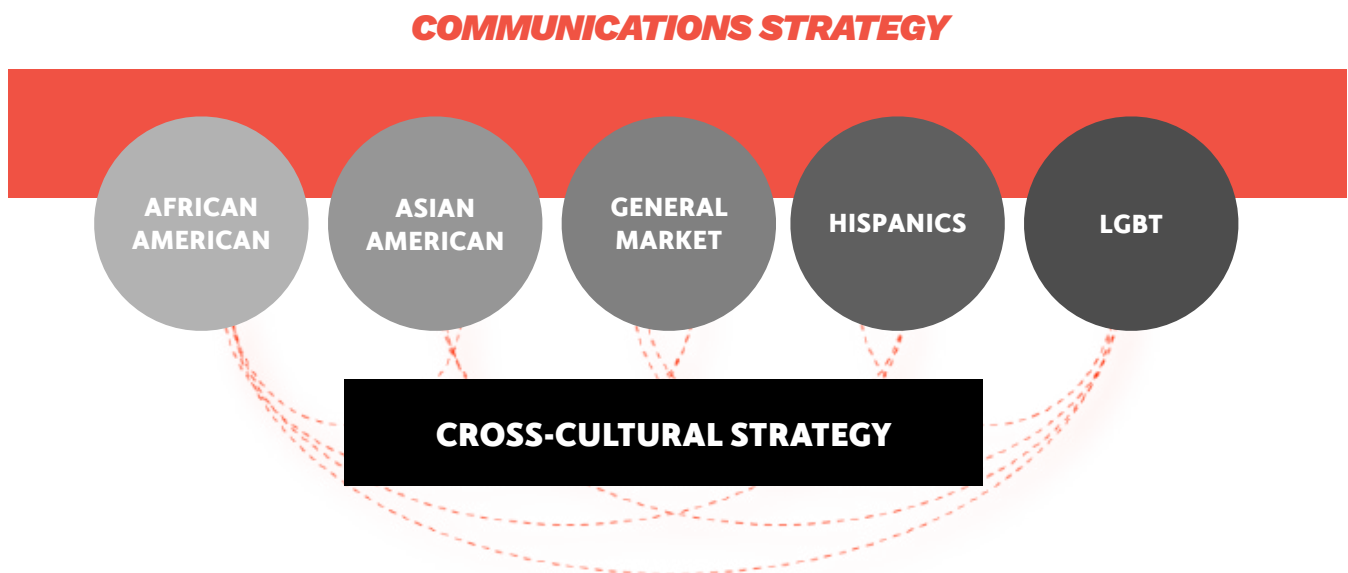


FIGURE #5
SOURCE: REFRAME THE MARKETPLACE: THE TOTAL MARKET APPROACH TO REACHING THE NEW MAJORITY

This meant that for Corporate America and Madison Avenue, gone were the days of pitching Corporate America based only on ethnicity, and now is the era of pitching the total budget, developing insights across all consumer segments, and researching and developing experiences across both common and nuanced insights. It was working! Not long after the reintroduction of the Total Market topic, the ANA, Toyota, Wal-Mart, General Mills and P&G introduced their versions of the Total Market topic and approach.

DISRUPTION IN CORPORATE AMERICA AND MADISON AVENUE

At the time, the welcomed traction and use of the Total Market topic in Corporate America and the Madison Avenue Ecosystem was encouraging and also concerning. Where did Corporate America and Madison Avenue get the change operating system from and who helped them with the internal change? A change operating system is required because when Corporate America makes structural changes, it should be scalable, repeatable and sustainable to de-risk the shift from one approach to another.

THE BEGINNINGS OF WHITEWASHING THE TOTAL MARKET TOPIC

After Mr. Bowman attended the 2011 ANA Multicultural Marketing Conference to discuss the Cross-Cultural versus Multicultural insights approach, the ANA's Multicultural Committee commissioned a study asking brands about the Total Market Approach and not the Total Market topic. They presented their findings, sourced from brands that were familiar with the language from the OgilvyCulture 2010 presentation and had no evidence of a change operating system, nor evidenced based outcomes. The findings from the ANA study provided a point of view about what the Total Market is, and is not, along with their vision and definition for the ANA's version of the Total Market. Was the ANA looking to re-author the Topic Market topic?

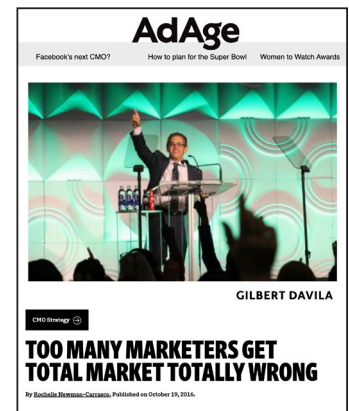


FIGURE #2
SOURCE: ADAGE

We've Been [Whitewashed]

Because Mr. Bowman re-introduced the Total Market topic, developed a marketplace change operating model, and tested and validated the approach using Cross-Cultural insights, he challenged the ANA and the study.

In the Spring of 2013, the ANA Multicultural Committee invited Mr. Bowman and his client, MetLife, to present the definition and marketplace change operating model for the Total Market industry vertical to their "multicultural" committee. The table was stacked against them. Even with no brand evidence, testing, learning, or case studies for their outcomes, the ANA committee decided to keep their version of the Total Market definition with no change operating model for the approach. The rest is history and deadly for some businesses on Black Madison Avenue.

Because Mr. Bowman had been testing, learning, and validating the approach; he knew the risk associated with the decision; and with no operating model, it would be a dangerous path and outcome for the foreseeable future.

‘AGAIN’ - WHY IT MATTERS TO BLACK LIVES ON MADISON AVENUE

Following the meeting, the Madison Avenue Ecosystem (ANA) continued to promote their hypothesis and their definition while advising members on their version of the approach. The Madison Avenue Ecosystem approach failed and the fallout was substantial in Corporate America and Black Madison Avenue. Brands started then stopped using the innovative approach and in some cases, people lost their jobs because of the ANA’s version of the “Total Market Approach.” Black Madison Avenue businesses were shuttered as a result of the miseducation and misinformation. Many jobs were lost, as agencies re-organized and even collapsed. The impact was felt by many in Adland who wrongly pursued the idea of what it meant to be a Total Market agency, based on the ANA’s misguided leadership and education for a generation of marketers in Corporate America and Madison Avenue.

Again, the miseducation and misinformation of the Total Market approach by the ANA may go down as one of the biggest tragedies in Corporate America and Black Madison Avenue. For the ANA, it was a window of opportunity for innovation turned into a new Total Market awards category at the ANA Multicultural Marketing conference. Similar to voter suppression, the Total Market topic and change operating model were suppressed to fit under the designation of Multicultural Marketing. This made the Total Market topic and approach less relevant in the annual budget discussions, hence marginalizing the innovation and making the outcomes less equitable for service providers who reflect the New America and want to compete for the total budget.

The ANA’s attempt to “re-author” the Total Market topic and approach was unjust and caused great harm to the Madison Avenue Ecosystem. The Total Market topic and Cross-Cultural approach was not an advertising and marketing practice. It is a change management practice that leads to a scalable and sustainable approach to connect to the New America in a relevant way. Remember, McKinsey is a management consulting professional services company offering change management services and not advertising and communications professional services. There were pros and cons to the use of the approach and it requires organizational change.



FIGURE #7
SOURCE: NEW YORK TIMES

PROS AND CONS OF THE NEW APPROACH FOR CORPORATE AMERICA AND MADISON AVENUE

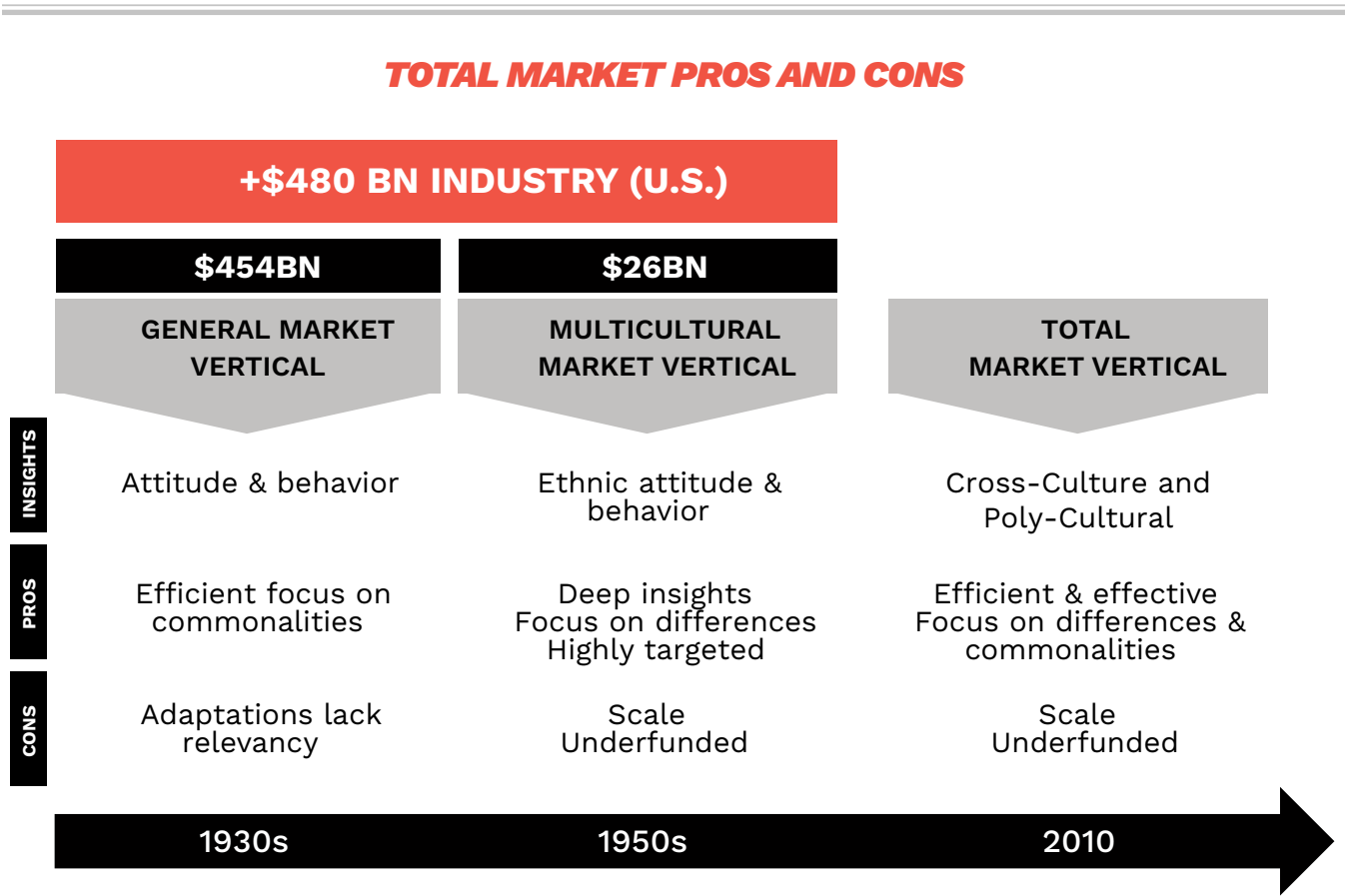


FIGURE #8
SOURCE: REFRAME THE MARKETPLACE: THE TOTAL MARKET APPROACH TO REACHING THE NEW MAJORITY

THE MADISON AVENUE ECOSYSTEM ANSWER TO BLACK LIVES ON MADISON AVENUE

In 2016, the ANA Multicultural Committee formed the Alliance for Inclusive and Multicultural Marketing (AIMM) focused on evolving and enhancing the relevance, effectiveness, and impact of multicultural and inclusive marketing in order to legitimize connections with consumers and, in turn, maximize business growth.

AIMM is a paid membership-based organization that serves as an extension of the ANA for helping transform what already exists, Multicultural Marketing. In their infancy, they called and pitched Corporate America asking them to join and help them develop a framework for change.

WHAT SHOULD CORPORATE AMERICA DO?

Corporate America has a responsibility to create an equitable and a level playing field for how it buys marketing and communications services from ALL of Madison Avenue. Corporate America took a stance for social equity with the Black Lives Matter (BLM) movement while still housing inequitable procurement practices where women - and minority-owned service providers can not scale their businesses, and hire and retain employees from their communities. Corporate America can not stand up for social impact without the ambition of reducing the inequity associated within the practice of Madison Avenue and Black Madison Avenue.

REFRAME MADISON AVENUE - A CALL TO ACTION TO JOIN NEW MOVEMENT!

Decades of general market and multicultural marketing practice, programming, training and development is not enough. We are advocating for the practice of change management to be the focus for impact and solving this decades-old problem.

Beginning today, we at Reframe are launching a new initiative and challenging the industry and Corporate America to REFRAME MADISON AVENUE. Disclaimer: Neither Reframe nor any of our affiliates are advocating or endorsing the destruction or dismantling of the practice of multicultural marketing, diversity, equity, inclusion and belonging.

For most of Corporate America Madison Avenue, the Fall and Winter months are the seasons for annual planning and/or the issuance of a Request for Proposal (RFP). If you are a People Leader in Corporate America buying marketing and communications from Madison Avenue, consider the following questions for transforming Black Lives, Black Businesses and Black Communities on Madison Avenue:

1. Does the talent base of my vendor partner reflect the New America? If not, what is the plan to right size the talent mix and by when?
2. Do you have a third way for buying and procuring marketing and communications services that is equity and fully inclusive (i.e. creative, public relations and media)?
3. Does the slate of vendor partners have the evidence and case studies to reflect their point of view of the Total Market topic and Cross-Cultural approach?
4. Have you sourced vendor partners to equitably pitch their marketing and communications services for the “total available budget” and not predetermine “General Market and Multicultural budget allocations?”
5. Does your annual spend accurately reflect the New America? If not, what is my plan moving forward to right size the budget and by when?

HERE’S WHAT WE ARE SAYING.

Reframe is the first tech-enabled change management platform that helps build inclusive experiences at scale. Throughout our work, we’ve found few are advocating for People Leaders. The C-suite continues to advocate for the practice of DEI, making pledges and pronouncements, but nothing changes! Marketing Professionals who are asked to change the enterprise are left with dated Madison Avenue “best practices” and minimal resources while being asked to solve a problem for the enterprise.

THE ASK

For People Leaders around the world, we want to hear from you. The evidence is in our white paper for we have to REFRAME MADISON AVENUE. Now we need your help.

We've set up a Change.Org petition at www.reframemadisonave.com. Over the next several weeks, we need your help in getting 500 signatures for our Change.org petition.

If you'd like to learn more and get involved, contact us at <https://getreframe.com/contact/#general-inquiries>

To stay connect and learn more about our published reports subscribe to our newsletter at <https://getreframe.com/#page-footer>

For those that have been on the Reframe journey, we thank you. For those new to the Reframe journey, welcome!

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ABOUT THE AUTHOR

Jeffrey L. Bowman is a 2X award-winning Wiley published author and former Madison Avenue ad executive turned Tech entrepreneur that helps Corporate America solve its people and culture problems. He and co-founder Safraz Sears pioneered a change approach and made a software platform because they recognized People Leaders had little data and visibility in real-time about the people they were being asked to lead.

Prior to co-founding Reframe, Bowman was a senior partner and managing director at Ogilvy & Mather in New York City. During his time at Ogilvy, he re-introduced the Total Market topic and pioneered a new marketplace change model that bridged the general market and multicultural marketing communications approach.

Bowman's work has been featured in The New York Times, The Economist, Fast Company, NBC (Today Show) and he speaks frequently at industry and trade events across the United States, Europe and South America.

When he is not “hacking workplace and marketplace change” for F1K companies, he enjoys being at home in New York with his two daughters.



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