

Industry Updates



AGENCY MANIASM
SOLUTIONS
Strategic Partnerships Delivered.

Looking ahead to 2026

“In an industry shaped by creativity, collaboration, data, and AI, clarity comes from knowing where to look and what to ignore.

This 2025 annual review curates the forces shaping the future of marketing.”

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



Readers love our bimonthly Industry Updates:



You'll find 'must read' content in each AMS Industry Update."

— Lisa Spielman, US Director, **COMvergence Worldwide**



Can't tell who the players are without a scorecard! Downloaded again. I often reference this tool throughout the year."

— Jim Wallace, Agency Management & Marketing Ops SME, **Blum Consulting Partners**



An indispensable synthesis of the industry, a must-read."

— Carol Mason, Managing Director (NY), **AdForum**



I always look forward to these Industry Updates! This industry is ever changing and it sometimes feels overwhelming to keep up with, this simplifies all of the updates.

I love that it makes us look like rockstars to our marketing stakeholders, too."

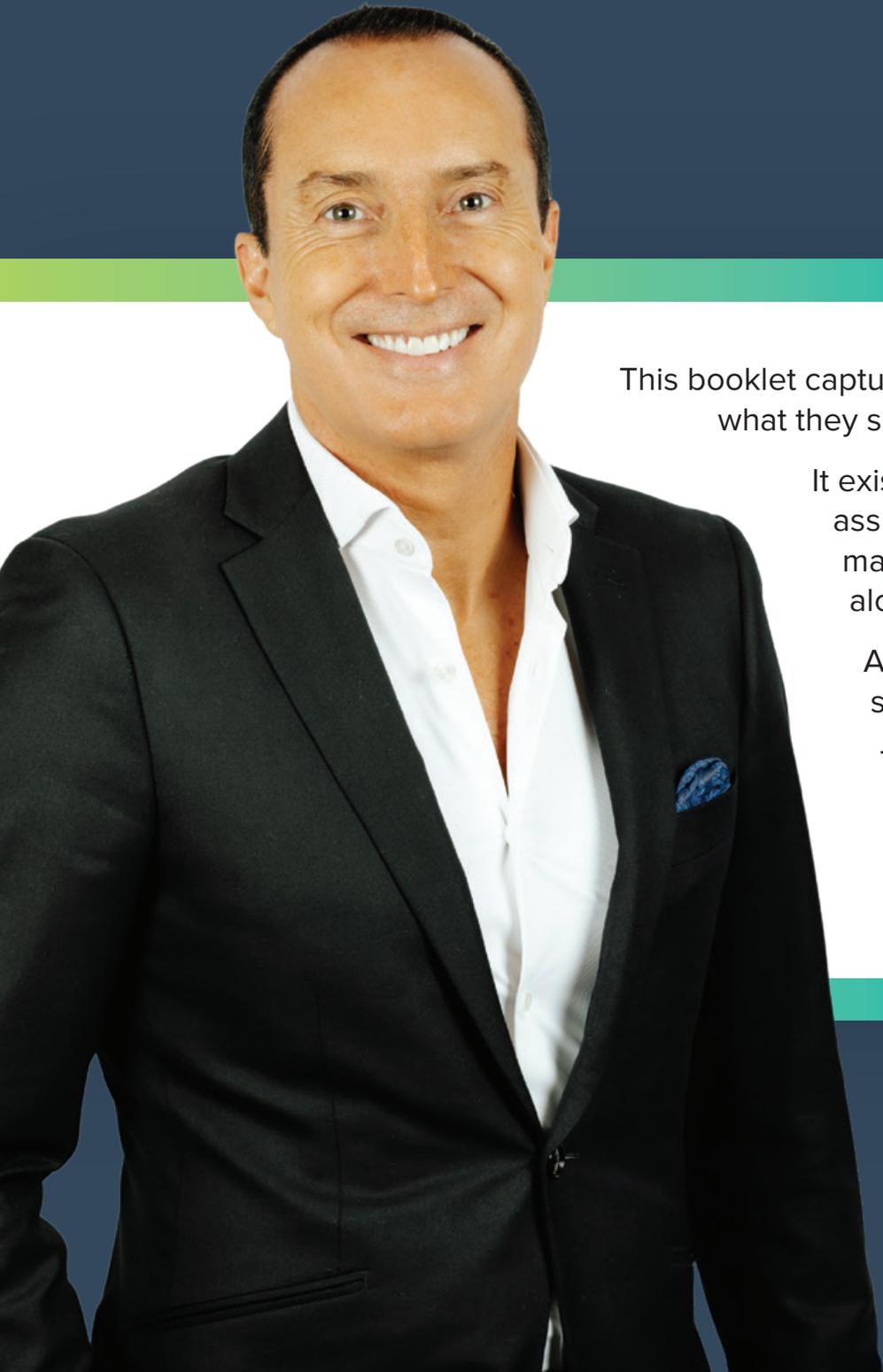
— Effie Katsoolias, Global Strategic Sourcing Manager, Marketing, **Stripe**



I've been following these industry updates for years, and they never disappoint.

It's like having a VIP pass to the latest developments and must-know trends, keeping me ahead of the curve on the key market shifts that are shaping our industry. The takeaways are always timely, relevant, actionable, and incredibly valuable."

— Cathy Stanley, Agency Management Advisor, **PayPal**



This booklet captures the defining moments of 2025 and, more importantly, what they signal for brand advertisers stepping into 2026.

It exists to do more than summarize events; it challenges assumptions, clarifies complexity, and brings focus to what truly matters next. Because progress doesn't come from information alone—it comes from understanding.

And when understanding sharpens, decisions become bolder, smarter, and more intentional.

That is where leadership shows up. That is where value is created. Enjoy the read.

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

This compilation of industry news would not be possible without the vast pool of publicly available resources, trade organizations, publications, and news channels in the marketplace, including ANA, AdForum, American Association of Advertising Agencies (4As), Ad Age, AdWeek, AdExchanger, AgencySpy, Chief Marketer, COMvergence, Campaign US, Ciesco, ClickZ, Forbes, major holding companies (WPP, Omnicom, Publicis, IPG, Dentsu, Havas, S4 Capital, Stagwell, etc.), LinkedIn, Little Black Book, Marketing Maestros, Marketing Dive, Marketing Procurement IQ, Madison Wall, MediaPost, mediasense, R3, Spiceworks, WFA, Wall Street Journal, and many others.



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EXECUTIVE SUMMARY: Where leaders should look now

The marketing landscape continues to expand in every direction, but leadership advantage comes from choosing where to focus. As AI reshapes execution, operating models consolidate, and accountability intensifies, not every development deserves equal attention. The themes that follow highlight where leaders should look now, focusing on the shifts that will materially shape growth, control, and performance in the year ahead.

Key themes

AI has become a leadership operating decision

AI is no longer a marketing innovation. It is an operating layer that directly affects speed, cost, and competitive advantage. Organizations that treat AI as a productivity tool will fall behind those that govern it as an enterprise capability tied to growth, IP protection, and accountability. The critical leadership question is no longer whether to adopt AI, but who owns it, how value is captured, and how risk is managed. As AI automates more execution, differentiation increasingly comes from judgment, governance, and orchestration rather than output alone. Leaders must ensure AI investments translate into sustained advantage, not just short-term efficiency gains or vendor dependency.

The agency ecosystem is being rewritten around control and scale

The market is rapidly moving away from fragmented agency models toward fewer, more integrated partners, or internalized capabilities, that offer scale, data leverage, and operational simplicity. This shift reflects a broader leadership mandate to reduce complexity, eliminate redundancy, and regain control over execution and outcomes. The winners will be organizations that intentionally design their operating model rather than inheriting one by default. For many enterprises, this means reevaluating what should be owned in-house versus partnered externally, and why. The cost of maintaining overly complex ecosystems now outweighs the perceived flexibility they once provided.

Talent strategy is now a growth strategy

Workforce disruption is not cyclical. It is structural, driven by automation, AI, and changing expectations of productivity. The most valuable talent going forward will combine strategic judgment, creativity, and technical fluency, supported by redesigned workflows rather than larger teams. Leaders who fail to proactively reshape roles, incentives, and skills will face rising costs with diminishing returns. This places pressure on leadership to invest in reskilling while simultaneously making hard choices about legacy roles and structures. Talent advantage will increasingly come from how work is designed, not just who is hired.



Marketing is being repriced around outcomes, not effort

Traditional marketing economics—fees tied to labor, hours, and activity—are increasingly misaligned with AI-driven efficiency and automation. Boards and finance leaders are demanding clearer lines between marketing investment and business impact, accelerating the move toward outcome-based and value-linked commercial models. This forces a fundamental reset in how marketing value is defined, measured, and defended. CMOs and CROs must now jointly own the narrative around growth contribution, not just brand or pipeline metrics. Organizations that cannot connect marketing activity to revenue and profitability will struggle to protect budgets and influence.



Growth is shifting from spend-driven to intelligence-driven

While global advertising continues to grow, advantage is no longer created by higher spend alone but by smarter allocation and faster execution. Organizations that can connect data, insight, creativity, and activation in real-time will outpace competitors even in constrained environments. The next phase of growth favors leaders who optimize for agility, relevance, and measurable impact rather than scale for its own sake. This shift elevates intelligence, integration, and speed as primary growth levers. Companies that move decisively will gain share without proportionally increasing spend, while slower competitors pay more for less impact.

How to use this booklet

This annual Industry Update is designed to be comprehensive yet easy to navigate. The content is organized into four major sections—Agency, Talent, Work & Performance, and Financials—so you can explore specific areas in depth or scan for broader perspective. An index in the back allows you to quickly locate companies, topics, and themes when using this as a reference throughout the year.

To help cut through the volume of industry news, each item is tagged using a classification system that signals priority and relevance:

» GAME CHANGING

Structural shifts that redefine the industry landscape and require immediate leadership attention.

» HIGH IMPACT

Meaningful developments that affect decisions, priorities, or performance and require teams to act or adapt.

» NOTABLE

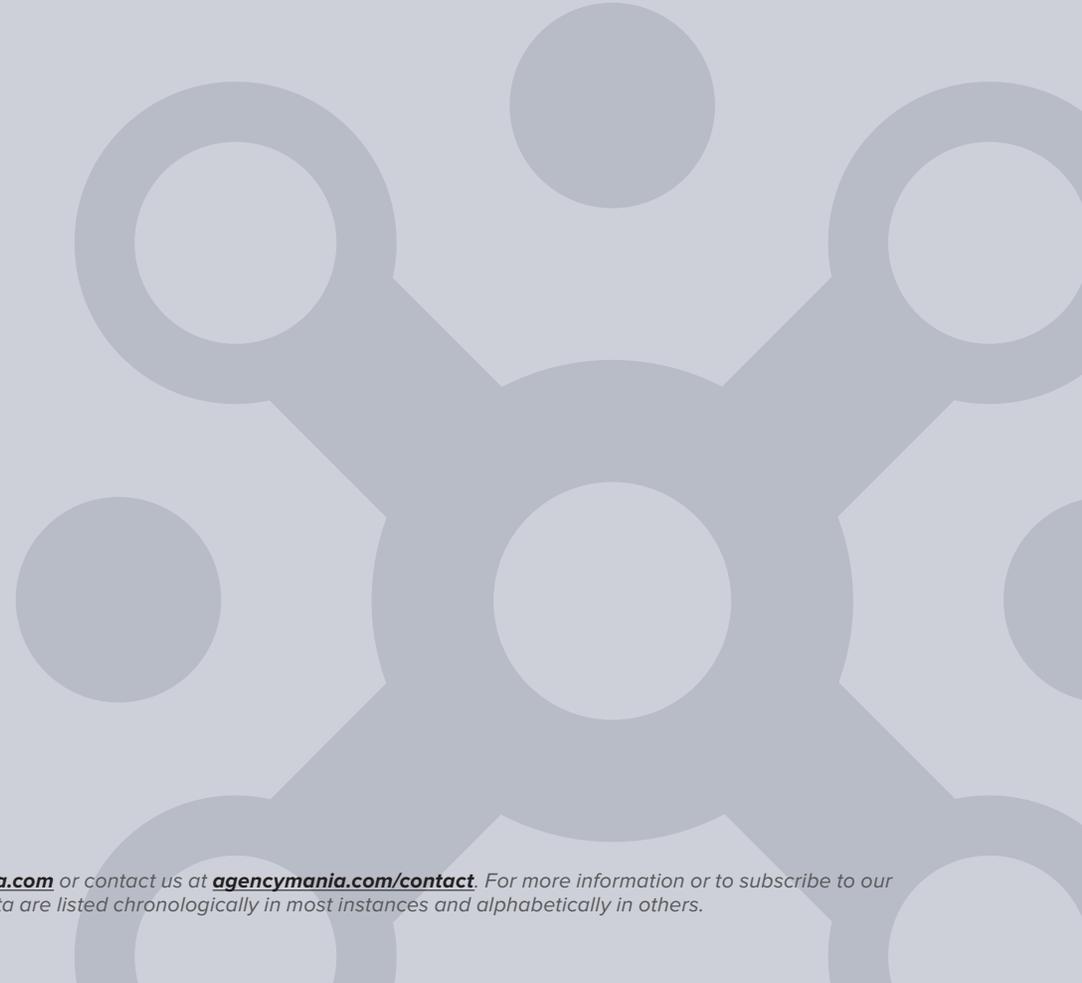
Relevant updates that provide useful context and awareness but do not demand immediate action.

Whether read cover to cover or used as a reference, this new classification system helps you focus on what matters most without getting overwhelmed.



Agency:

Roster changes summary







AGENCY: Agency reviews & 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.

Apparel & luxury

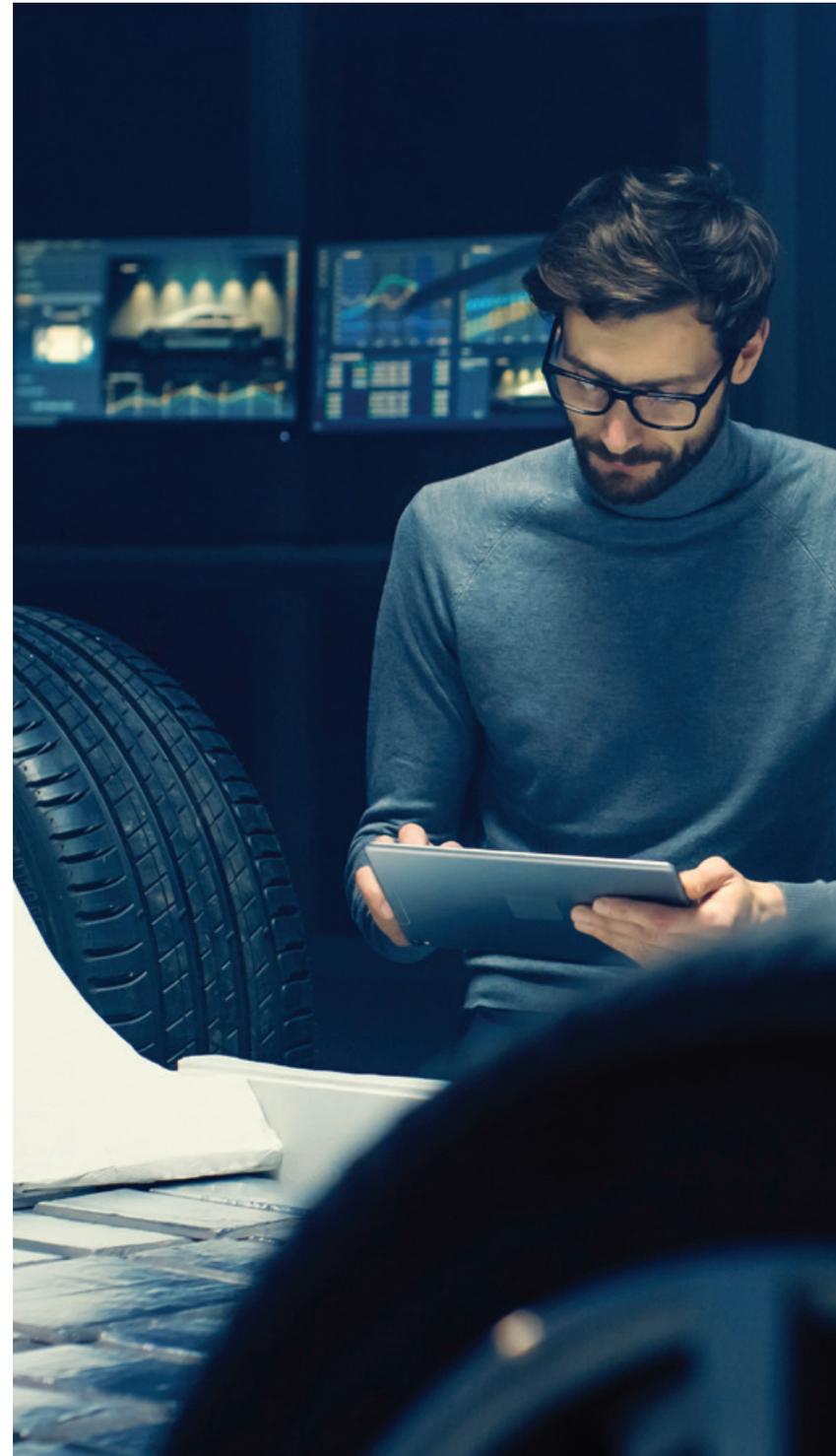
- Global sports company **Puma** selected Omnicom-owned adam&eveDDB as its global creative AOR following a review. The agency's London and Berlin offices will manage the account.
- **Brooks Running** selected Stagwell-owned media agency Assembly as its SEO AOR across multiple European markets following a review. Expanding its existing relationship, the agency was already handling paid media and SEO in North America.
- Jewelry marketer **Pandora** consolidated its global media account with Dentsu as its global media AOR for the past eight years. Dentsu will handle media planning and buying across 36 markets, as well as global performance studio across social and search, and will continue to support the brand's Pandora Experience Lab, which is designed to connect media, performance marketing, CXM, and creative.
- Footwear company **Red Wing Shoe Co.** selected Minneapolis-based social marketing agency The Social Lights as its social AOR.
- Levi Strauss-owned LA-based activewear company **Beyond Yoga** selected Shadow as its integrated AOR. The agency will handle media relations and celebrity and influencer partnerships. Beyond Yoga also selected IPG Mediabrands agency UM as its media AOR in the US following a review. UM has been Levi's global media AOR.
- Luxury Brand Holdings-owned jewelry retailer **Ross-Simons** selected Doner Media, the media arm of Detroit-based agency Doner, as its media AOR following a review, replacing incumbent Kepler. The agency will handle media planning and buying for the brand, including research, audience profiling, channel diversity, and hyperlocal marketing.
- Women's handbag, apparel, and accessory company **Vera Bradley** selected Austin-based agency Callen as its creative AOR following a review. The agency will handle strategy and creative.
- Outdoor apparel brand **Gore-Tex** selected Mediaplus Group as its global media AOR following a review. The agency will handle all media duties in EMEA and North America, including digital, video, OTT, programmatic, and search, in partnership with its agency subsidiary MediaScale.
- Brazilian flip-flop brand **Havaianas** selected Gut as its first global creative AOR following a review. The brand previously worked with a local Brazilian agency. Havaianas's Brazilian business will continue to be handled by AlmapBBDO. The agency will handle global brand strategy, working in tandem with Havaianas's São Paulo-based team.
- British sneakers and sportswear firm **JD Sports** selected Chicago-based independent, woman-owned creative and media agency Empower Media as its first media AOR. The agency will handle all media duties in the US, leveraging its offices in Chicago, Cincinnati, Atlanta, New York, Houston, and Palm Beach.
- The luxury giant **LVMH** shifted part of its European media business from Publicis to Havas to geographically rebalance its media agency partnerships within its current global portfolio. Havas's Argentina-based agency Forward Media took on additional European markets.
- LVMH-owned German luxury luggage and lifestyle brand **Rimowa** selected Globant-owned Gut as its global AOR following a review and replacing incumbent Stagwell's Anomaly. The Gut Amsterdam office will run the account. GUT will leverage offices in Miami, Buenos Aires, São Paulo, Toronto, Mexico City, Los Angeles, Amsterdam, Madrid, New York, and Singapore.
- Men's premium activewear brand **Rhone** selected Kepler as its media AOR. The agency will handle all media duties, including full-funnel strategy, digital activation, and measurement across all major platforms.
- Western lifestyle apparel brand **Sendero Provisions** selected Austin-based agency Bakery as its creative and cultural AOR following a review. The agency will handle all creative and integrated advertising duties, including content production, as well as media through Bakery's sister media agency, Ken.
- Luxury jewelry line **Tacori** selected San Diego-based agency Gestalt as its creative AOR. The agency will handle creative cross-platform, in-store design, partnerships, and platform updating.
- **Under Armour** selected OMD APAC as its media AOR following a review. The agency will handle brand and performance media planning and buying across China, Korea, and South APAC.
- Global apparel and footwear marketer **Wolverine Worldwide** selected the Havas Media Network (HMN) as its media AOR following a review. HMN was the two-year incumbent agency following a vendor consolidation and is therefore renewing its contract with the brand. The agency will handle hyperlocal planning, community marketing, and performance optimization
- Deckers Brands-owned and performance-running footwear company **Hoka** selected Rygr, a Colorado based integrated marketing agency, as its brand communications AOR. The agency is also responsible for earned-media strategy for Hoka.

Automobile

- Luxury electric vehicle maker **Lucid Motors** selected Giant Spoon as its creative AOR. The agency will handle creative and strategic duties in the US (including TV, digital, social, print, and OOH), with extended support globally.
- Automaker giant **Stellantis** retained Stagwell's Detroit-based Doner and Omnicom's GSD&M as creative AORs on its roster. The brand selected Doner for its Ram business and GSD&M for its Dodge, Chrysler, Alfa Romeo, and Fiat businesses. The Jeep account was not under review and is handled by Highdive.
- Automobile giant **Volvo Cars** selected Interpublic Group's Mediabrands agency Initiative as its global media planning and buying AOR following a review, replacing incumbent WPP's Mindshare. The agency will manage media strategy, planning and buying in all regions, with the exception of China.
- BMW-owned automobile brand **Mini** selected, following a review, Hamburg, Germany-based independent global creative agency Jung von Matt Group as its lead creative AOR for international campaigns, operating out of its London and Zurich offices.
- **BMW Group** retained Dentsu as its integrated media AOR for BMW, MINI, and BMW Motorrad in 23 markets in Europe. Dentsu media agency iProspect leads the account. The agency will handle full-funnel media planning and buying across all channels, as well as data and technology consultancy across all three BMW Group brands. The assignment also includes support for the launch of Neue Klasse, BMW's new electric vehicle platform.
- **Volkswagen of America** selected global digital consultancy CI&T as its North American digital AOR, replacing five-year incumbent WPP in North America. The agency will handle strategy, design, and development for VW.com and the myVW app.
- German automaker **Porsche** selected Omnicom Group's Adam&eveDDB as its creative AOR in the US following a review, replacing 17-year incumbent Chicago-based Cramer-Krasselt

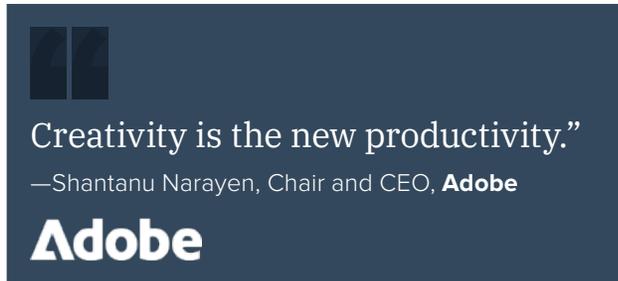
Consumer Packaged Goods (CPG)

- **Kimberly-Clark** selected Omnicom Media Group as its global media AOR, except for North America and South Korea, following a comprehensive review, in a move to consolidate the firm's company roster. The brand also selected WPP for creative duties for the company's adult care (Depend, Poise, Plenitud, etc.) and childcare brands (Huggies, Pull-Ups, GoodNites, etc.), and IPG for creative duties for family care (Kleenex, Cottonelle, Scott, Andrex, etc.) and feminine care brands (Kotex, Intimus, etc.). The brand previously worked with these agencies but also with hundreds of other agencies globally, such as Droga5, VaynerMedia, Mischief @ No Fixed Address, and Quality Meats.





- Eco-friendly laundry detergent sheets **Earth Breeze** selected Mile Marker as its media AOR following a review. The agency will combine integration and customization to bring together brand and performance media. Earth Breeze also selected New York-based independent agency Terri & Sandy as its creative AOR following a review.
- Reynolds Consumer Products' **Hefty** selected IPG-owned McCann as its integrated AOR following a review. The agency will handle all duties through its McCann Detroit and Toronto offices, replacing two-year incumbent Omnicom-owned DDB.
- CPG giant Nestlé's **Nespresso** selected Publicis Groupe's Leo following a review and replacing 19-year incumbent IPG's McCann. Nespresso will continue to work with McCann Worldgroup and IPG agencies in other capacities, including FutureBrand, UM, Weber Shandwick, and MRM.
- Premium pet food brand **Orijen** (Champion Petfoods, part of Mars Petcare) selected TDA Boulder as its global creative and strategy AOR. The agency will handle global creative campaign and strategy efforts in the US, Canada, European Union, Mexico, South America, and China.



- **OtterBox**, an American privately owned consumer electronics accessory company, selected Digitas as its new global creative AOR following a review. The agency will handle the Made for Yes platform to reposition the brand for Gen Z.
- **PurposeBuilt Brands**, a global maker of specialty cleaning products, selected Milwaukee-based Hanson Dodge as its creative AOR for its Weiman brand without a review, expanding the remit of the agency (beyond Green Gobbler).
- Mosquito protection solutions and Boston-based firm **Thermacell** selected Gut Buenos Aires as its global creative AOR following a review. The agency will handle all creative duties, including its upcoming global campaign in the US, Canada, Europe, Asia, Australia, and Latin America.
- Health and hygiene products company **Reckitt** selected WPP Media as its media planning and buying AOR across 21 European markets, replacing several incumbent agencies. WPP Media will handle all media duties for Reckitt's core brands, including Durex, Nurofen, Strepsils, Gaviscon, Veet, Dettol, Finish, and Vanish. WPP is implementing an integrated model that combines local market expertise with the company's AI-driven marketing operating system, WPP Open.

Entertainment & media

- Online casino **FanDuel Casino** (owned by FanDuel) selected Brooklyn, New York-based independent agency Orchard Creative as its creative AOR following a review, replacing incumbent Mischief @ No Fixed Address.
- **The New York Times** selected Stagwell's 72andSunny as its creative AOR following a review, replacing eight-year incumbent Accenture Song's Droga5.
- Digital entertainment giant **Electronic Arts** selected WPP's GroupM as its global media AOR following a review and revamp of its agency model, replacing sibling five-year incumbent WPP's T&Pm. GroupM acquired T&Pm in 2024.
- **Hearst** selected global marketing services company PMG as its creative and media AOR as part of a multiplatform investment in brand-building across Hearst's businesses. The multichannel effort will focus on the role local newspapers play in their communities, and on Hearst's storytelling capabilities.
- **Manchester City Football Club** selected Publicis Sapient as its digital business transformation AOR and partner. The agency will help optimize operations across the club using their SPEED methodology (strategy, product, experience, engineering, data/AI).
- **Warner Bros. Discovery** selected Omnicom-owned Hearts & Science APAC (part of Omnicom Media Group) as its media AOR for the company's theatrical and streaming divisions across several Asia Pacific markets following a review. The agency will handle media planning and buying for the brand.
- Premium cable network **Starz** selected independent Horizon Media as its media AOR following a review, replacing incumbent Canvas Worldwide.
- Social media icon **TikTok** selected Pereira O'Dell as its global creative AOR following a review. The brand has been known to work with a wide range of agencies (including Atlantic New York and Mojo Supermarket).
- Online casino gaming company **Boyd Interactive** selected New York-based Involved Media as its media AOR. The agency will handle all media duties for the firm's brands, including ResortsCasino.com and Stardust Online Casino.
- Women-first online dating company **Bumble** selected independent agency Special US as its global creative AOR to oversee a global creative campaign. The agency will partner with the brand's in-house studio.
- Online gambling company **FanDuel** selected Arts & Letters as its creative AOR, replacing four-year incumbent Wieden+Kennedy. The agency will handle all creative work for FanDuel Sportsbook.
- **Paramount** consolidated its US Paramount+ media account with IPG Mediabrands, following a review and replacing incumbent Horizon Media. For the large part of its media business, the brand selected Publicis, replacing incumbent WPP Media.



- Wikimedia Foundation-owned **Wikipedia** selected Spin as its first social media AOR. The agency will handle social-first videos and social content for the organization.
- UK TV network and broadcaster **BBC** renewed its media agency contract with Havas for six years following a review. Havas has been the media planning and buying AOR since 2015.
- Family-themed attractions operator **Herschend Family Entertainment** selected Crossmedia as its media AOR following a review and replacing incumbent Allied Global Marketing. The agency will handle all media duties for the brand portfolio, including Dollywood Parks & Resorts, Silver Dollar City Parks & Resorts, Wild Adventures Theme Park & Safari Campground, Kennywood, and Adventure Aquarium.
- **Snap Inc.** selected Seattle-based digital marketing agency New Engen as its creative AOR following a review. The agency will handle both in-app and cross-channel creative and campaigns in the US and international markets to drive engagement and loyalty. New Engen will work with regional creators worldwide and leverage its in-house content studio, Donut Studios, for building scaled, creator-driven campaigns.
- Provider of financial planning and life insurance **Northwestern Mutual** selected independent agency PMG as its US media AOR following a review, replacing incumbent Horizon Next.
- Financial services giant **Mastercard** selected WPP Media as its global media AOR following a review. The agency will handle media strategy, planning, and buying in 70 markets, replacing 11-year incumbent Dentsu's Carat. As part of the move, WPP-owned Ogilvy will handle social listening. WPP Media will partner with the brand's long-term creative and social AOR, IPG's McCann, and leverage its advanced data and AI (Open Intelligence) capabilities.
- **PayPal** selected Publicis Groupe as its global media AOR following a review and replacing two-year incumbent WPP Media (then GroupM). Publicis previously handled PayPal's creative business through its BBH USA agency.

Financial services

- **J.P. Morgan** selected IPG-owned The Martin Agency as its creative AOR for its wealth management business following a review. Incumbent Accenture Song's Droga5 will retain some of the business.
- **MassMutual** selected Stagwell's 72andSunny New York as its new creative AOR without a review, replacing four-year incumbent Grey. The brand is currently working with Stagwell agencies on a project basis.
- Financial services firm **Principal Financial Group** and Principal Asset Management selected Dentsu's iProspect as its media planning and buying AOR in the US following a review. The move expands the work done by the holding company. Dentsu Creative already handles creative, and Merkle handles customer experience for the brand.
- Italy-based insurance and financial services giant **Generali** selected WPP's VML as its global strategic and creative AOR following a review. The agency will handle the account with a centralized team in the UK and Italy, leveraging AI marketing platform WPP Open, digital agency AKQA, production unit Hogarth, and other WPP resources.
- Payment technology giant **Visa** added Stagwell's Anomaly to its agency roster and parted ways with five-year creative AOR Wieden+Kennedy. Anomaly had been doing project work for the brand.
- Home equity-based financing solutions **Finance of America** selected Los Angeles-based David&Goliath as its creative AOR following a review. The agency, an independent subsidiary of Innocean Worldwide, will handle creative development, brand, social and communication strategy, and a brand repositioning campaign.
- Fintech company **Rocket Companies** selected Viral Nation as its first social media AOR following a review. The agency will partner with Mirimar, the creative AOR, and Publicis-owned Zenith, the brand's media AOR.
- **Valley Bank** selected Doner as its strategic and creative AOR following a review. The agency will handle media buying and planning.
- Financial giant **American Express** selected Omnicom Group's Goodby Silverstein & Partners as its creative AOR in the US and TwentyFirstCenturyBrand as its global brand strategy agency following a review, replacing incumbents Dentsu Creative and WPP's VML. Dentsu Creative will continue to support international advertising and other creative projects. The agencies will collaborate with IPG's UM, the brand's global media AOR.

To stay relevant in an AI-driven world, marketers must deeply integrate their brands into this new ecosystem, ensuring visibility and preference in the agentic decision-making process.”

—Raja Rajamannar, Chief Marketing and Communications Officer, **Mastercard**





- Real-estate investment and Baltimore-based firm **Tide Realty Capital** selected Warschawski as its integrated AOR. The agency, a national boutique marketing communications firm based in Baltimore, will handle integrated marketing campaigns, as well as branding, advertising, marketing, digital, public relations, social media, web development, creative design, and crisis communications services.
- Private markets investing platform **Yieldstreet** selected IPG's Mediabrands as its media buying AOR and IPG's MullenLowe US as its creative AOR. The media agency will handle media strategy, planning, and activation for channels such as programmatic and paid social. The creative agency will handle TV, digital, and social duties.



Healthy, fact-based debates foster balanced, well-rounded decisions that ultimately drive the best outcomes.”

—Kristi Boyd, Senior Director, **The Coca-Cola Co.**

THE *Coca-Cola* COMPANY

Food & beverage

- **Deutsch Family Wine & Spirits** selected Tombras as its media AOR following a review, replacing 14-year incumbent Havas Media, and expanding the brand's relationship with the agency (previously focused on Yellow Tail and Josh Cellars). The agency will handle all media planning and buying across the brand's portfolio, which includes Cantera Negra Tequila, Bib & Tucker Bourbon, and Redemption Whiskey.
- **Panera Bread** selected Stagwell's 72andSunny New York as its creative AOR following a review. The agency will handle all brands, including Panera Bread, Caribou Coffee, and Einstein Bros. Bagels across 2,208 franchises in 48 states.
- **Pizza Hut** selected IPG's Deutsch and WPP's VML as its creative and media AORs, respectively. Deutsch will manage brand strategy, creative, and paid social and video content, replacing six-year incumbent Omnicom-owned GSD&M. VML will handle customer promotions, loyalty, CRM efforts, and digital assets, as well as organic social, replacing incumbent social AOR Mischief @ No Fixed Address.
- Burger chain **Smashburger** dropped its creative AOR, Partners in Crime, and moved to project-based relationships. Roster agencies include Havas Formula, Havas Street, social creative agency Kvell, and consultancy and freelancer network firm X&O.
- Seattle-based coffee giant **Starbucks** selected Stagwell's Anomaly as its creative AOR in the US, only months after selecting WPP's SPCSHP, which created a bespoke Team Starbucks composed of WPP agencies such as VML, Ogilvy, and Landor. WPP remains on the roster.
- Organic and cold-pressed juice brand firm **Suja Life** selected BarkleyOKRP as its creative AOR following a review. The brand had no AOR prior.
- Smoothie and fast-casual dining chain **Tropical Smoothie Café** selected independent Horizon Media as its media AOR following a review. The agency will handle data-driven strategies, advanced technology, and innovative media solutions to drive growth for its 1,500 locations.
- Southern fast-food chain **Whataburger** selected Chicago-based Empower Media its media AOR, handling media strategy, planning, and buying across all channels
- **Whole Earth Brands** selected Winston-Salem, North Carolina-based The Variable as its integrated AOR for the Whole Earth and Wholesome brands following a review. The agency will partner with the agency Power Digital, which handles digital media buying, planning, and strategic duties.
- Maryland-based **Black Viking Brewing** selected WPP-owned Notorious111 as its creative AOR. The agency will handle all creative duties, including brand identity and campaign execution.
- Quick-to-table, farm-inspired food manufacturer **Bob Evans Farms** selected Stagwell-owned Colle McVoy as its first media planning and buying AOR following a review. The agency will partner with the brand's creative AOR, Venables Bell + Partners.
- Nashville-based seafood restaurant chain **Captain D's** selected Stagwell-owned Doner as its creative AOR following a review. The agency will handle all creative duties, creative and strategic assignments, and also social, digital, in-store, and e-commerce for the brand.
- **Casper's Ice Cream** selected TDA Boulder as its creative AOR without a review. The agency will handle creative duties including experiential marketing, brand partnerships, social media, out-of-home activations, influencer partnerships, and CTV.
- **The Coca-Cola Company** selected Publicis Groupe as its media AOR in the US and Canada following a review, replacing four-year incumbent WPP (and its Open X bespoke team). The brand, which spent \$5.15 billion on advertising globally in 2024 (\$1.8 billion in the US), refers to Publicis Groupe as a “complementary partner,” staying committed to WPP in other regions and other work categories.



- Restaurant chain **Cracker Barrel Old Country Store** selected Blue Engine, Prophet, and Viral Nation as AORs: Communications firm Blue Engine as AOR for public relations, experiential marketing, and partnerships; Prophet as brand AOR, handling brand communication, restaurant redesigns, and brand marketing campaigns; and Viral Nation as social media AOR. The agencies will partner with Dentsu's Carat as its media AOR and Merkle as its loyalty rewards AOR.
- The Mars-owned snack bar brand **Nature's Bakery** selected Culver City, California-based independent integrated advertising agency Zambezi as its creative AOR following a review. The agency will handle omnichannel marketing and creative strategy.
- Constellation Brands-owned beer brand **Pacifico** selected Day One Agency as its creative AOR following a review, replacing incumbent WPP's Ogilvy. The agency will handle all creative.
- Unilever's ice cream brand **Wall's** selected Omnicom Group-owned 180 Amsterdam as its creative AOR following a review. The agency will handle creative, social, community engagement, digital, TV, OOH, integration with content creators, and partnership channels in the UK, Europe, ANZ, LATAM, and Asia.
- KP Snacks-owned **Whole Earth Foods** selected St Luke's as its lead creative AOR, without a review. The agency, which has been working for the brand for five years, will handle brand strategy development and creating ATL (above the line) and digital communication.
- **American Honey Whiskey** selected Chicago-based agency Someoddpilot as its new creative AOR following a review. The agency will handle all creative duties for the Campari Group-owned brand.
- Inspire Brands-owned fast-food sandwich chain **Arby's** selected Tombras as its social media AOR following a review, replacing incumbent Publicis Groupe's Fallon. The agency will handle social strategy, social creative, content creation, cultural activations, social listening, community management, and engagement.
- Napa, California, winery **Bread & Butter Wines** selected Argonaut as its creative AOR. The agency will handle all creative duties, including the brand omnichannel strategy and campaign work.
- **Coca-Cola Co.** renewed its global marketing partnership with WPP, which is led by WPP Open X. WPP handles end-to-end creative, media, data, and marketing technology across the company's entire portfolio. The contract renewal excludes the North America media business, awarded to Publicis Groupe in early 2025.
- Heineken USA-owned Mexican import **Dos Equis** selected Publicis-owned LePub as its creative AOR, replacing two-year incumbent Omnicom's BBDO. The agency is already working for Heineken brand as its US and global AOR.
- Grilled chicken restaurant chain **El Pollo Loco** selected ad agency Innocean USA as its creative AOR following a review. The agency will handle creative strategy, content production for brand creative and social, merchandising, and design. The agency will partner with the media AOR (IPG's Initiative) and digital AOR (Omnicom's Organic).
- Darden Restaurants-owned chain of Italian American food **Olive Garden** selected Havas Media Network as its new media AOR for its US planning and buying business, following a review and replacing 15-year incumbent Publicis Media's Starcom. The agency will handle all media duties, including strategic communications planning, video media investment, and promotional work.
- Restaurant giant **Panda Express** selected independent agency The Many as its media AOR. The agency worked for several years with the brand prior to this assignment on both media and creative. Creative duties are now handled by Opinionated.
- Vegan hummus and falafel brand **Ramona** selected Supernova as its social media AOR following a review. The agency will handle social media strategy, content planning and production, influencer management, and paid social activity.
- Frozen burritos and breakfast sandwiches firm **Red's** selected Joan Studios, the content studio within the Joan agency, as its first creative AOR. The agency will handle social-first strategy and creative activations, and an influencer enthusiast program.
- Sandwich chain giant **Subway** selected Publicis Groupe's recently formed Leo agency (a merger of Leo Burnett and Publicis Worldwide) as its creative AOR in the US following a review, replacing eight-year incumbent Dentsu Creative. Dentsu will continue to handle social for the brand, which is also reviewing its US paid media business.
- Inspire Brand-owned fast-food sandwich chain **Arby's** selected Publicis-owned BBH and independent Tombras to manage its creative business following a review, splitting its creative duties between the two agencies and replacing 10-year incumbent Fallon. They will partner with media AOR Publicis Groupe.
- **Bad Ass Coffee** selected Brooklyn-based The BAM Connection as its integrated AOR without a review. The agency will handle strategy, campaign development, social, digital, e-commerce, and in-store for the brand.
- **Bacardi** Limited selected Publicis Groupe's BBH as its global creative AOR for Bacardi Rum, Mother for Bombay Sapphire, and NCA London (WPP's Ogilvy) for St-Germain, following a review and replacing 10-year incumbent Omnicom Group's BBDO.
- Almond-flavored Italian liqueur brand **Disaronno** selected Stagwell Group's 72andSunny Amsterdam to deliver a new brand platform and global campaign.
- **Dole Whip** selected Minneapolis agency Haberman as its integrated AOR following a review. The agency will handle creative and media including connected TV, YouTube, streaming audio, paid social, programmatic display, and influencer partnerships.



- Pizza chain **Hungry Howie's** selected independent agency Gravity Global as its new integrated AOR following a review and replacing incumbent Doner and a few other shops. Gravity Global will handle strategy, media, creative, and social duties. The agency is expected to leverage its Gravity One division focused on millennials and Gen Z audiences.
- Yum! Brands-owned West Coast burger chain **Habit Burger & Grill** selected Brainlab-owned Exverus Media as its US media AOR following a review, replacing one-year incumbent Publicis Groupe's Connect (affiliated with Spark Foundry). The agency will partner with creative AOR Barrett Hofherr.



In a TUNA world—Turbulent, Uncertain, Novel, and Ambiguous—marketers face pressure to deliver immediate savings. Yet evidence shows that short-term thinking can compromise long-term brand equity.”

—Stephan Loerke, CEO, **WFA**



- Berkshire Hathaway-owned restaurant chain **International Dairy Queen** selected Colle McVoy as its creative AOR following a review, acting as integrated agency team lead, and replacing incumbent SPCSH. Colle McVoy will handle creative strategy, social, and digital.
- **Keurig Dr Pepper** selected Publicis-owned agency BBH USA as its creative AOR on two of its flagship brands, 7UP and RC Cola. The brand recently dissolved its in-house agency, Liquid Sunshine.
- Confectionery giant **Mars Inc.** selected Publicis Groupe as its global integrated AOR with a bespoke team called OneMars, following a review and replacing incumbents from IPG, Omnicom Group, and WPP, mostly seven-year incumbent WPP Media's EssenceMediacom for media planning and buying. OneMars will handle all duties, including media, production, commerce, paid social media, and influencer marketing in 70+ markets. The brand also consolidated global brand PR with IPG, led primarily by IPG's Weber Shandwick Collective. Creative duties remain with Omnicom's BBDO and DDB as well as WPP's T&P.
- Fast-food giant **McDonald's** selected Translation (in partnership with music distribution company UnitedMasters) as its creative AOR for the African American consumer market following a review and replacing incumbent Burrell Communications.
- Specialty bakery chain **Nothing Bundt Cakes** selected Dallas-based agency Moroch as its integrated (creative and media) AOR, replacing incumbent PMG. The agency will handle lead performance-focused media and marketing duties.
- PepsiCo's soda brand **Poppi** selected independent agency Mirimar as its creative AOR following a review. The brand historically handled marketing in-house. The agency will handle creative duties and will partner with Tinuiti, Poppi's media AOR.
- One of Italy's largest coffee brands, **Segafredo Zanetti** (part of Massimo Zanetti Beverage Group), selected BBH as its global creative AOR following a review. The agency will handle brand positioning and build a communications platform for the brand.
- Charlestown, Massachusetts-based sparkling water **Spindrift** selected The Brand Guild as its integrated AOR following a review. The agency will handle influencer marketing and PR for the brand from its offices in Washington, DC, and New York.
- Yum Brands-owned chain **Taco Bell** selected Quality Meats to join its creative roster (which includes Deutsch) following a review. The agency will handle a range of creative services.
- **Tropicana Brands Group** selected Fig as its creative AOR following a review, replacing incumbent Cramer-Krasselt, and expanding the work done by the agency with Naked Smoothies. The agency will handle all creative duties for Tropicana, Naked, and Izze.
- Yogurt brand **The Collective** selected Five by Five's social media shop TSA as its UK influencer and social media AOR following a review. There was no incumbent. The agency will handle all activities related to Instagram and TikTok, as well as content planning and production, influencer management, and paid social activity.
- Restaurant chain **White Castle** selected Omnicom GSD&M as its new integrated AOR following a review and replacing incumbents Crossmedia and Omnicom Group's Merkley+Partners. The agency will handle creative, strategy, media, experiential, and social duties. Blue Chip remains White Castle's shopper marketing AOR.
- **Benton's Smoky Mountain Country Hams** selected Richmond, Virginia-based Tilt advertising and fullservice Production as its creative AOR. The agency will handle creative advertising, social storytelling, experiential activations, and production.
- Medical-grade hydration drink **Biolyte** selected Burrell Communications Group-owned Fitzco as its first integrated AOR. The agency will handle both creative and media.



- **Ingredient**, a global provider of ingredients to the food and beverage industries, selected Milwaukee-based, full-service Bader Rutter as its first global AOR following a review, consolidating work from multiple agencies. Bader Rutter will handle integrated brand strategy, creative, and media planning and buying.
- Swedish healthy snacks brand **Nick's** selected Cincinnati-based independent full-service agency Curiosity as its first creative AOR following a review. The agency will support all creative duties for the no-added-sugar ice cream, protein bars and candy brand portfolio, and include social, shopper, and cultural activations.
- The **National Pork Board** selected Dallas-based crosscultural ad agency LERMA/ as its Hispanic AOR following a review, replacing incumbent Republica Havas. The agency will handle Hispanic creative, strategy, social, and paid media and partner with the brand's consumer marketing AOR, BarkleyOKRP.
- Jarlsberg cheese parent **Norseland** selected One Horizon (the full-service creative agency that Horizon Media launched last year) as its integrated AOR following a review. There was no incumbent. The agency will handle all duties, including online video, paid social, search, shopper marketing, and influencer marketing.
- Ascent Hospitality Management-owned casual dining chain **Perkins American Food Co.** selected Acadia as its new media and social AOR following a review, replacing incumbent Buntin Group and Dunn & Co. The agency will handle paid search, paid social, integrated media, TikTok and Instagram management, influencer management, studio creative, and full-funnel analytics support.
- Fast-casual restaurant chain **Shake Shack** selected Portland, Oregon-based independent shop Opinionated as its new creative AOR following a review, replacing incumbent Austin-based Preacher. The incumbent agency was invited to join the pitch but declined. Opinionated will partner with other AORs, including PMG for media, Confidant for consumer PR, and ICR on business and earnings communications.
- Beverage company **Saint James Iced Tea** selected New York-based January Digital as its digital media AOR following a review. The agency previously led the brand's paid media strategy. The agency will handle all digital media duties, including full-funnel media planning, execution, and optimization.
- Barcel USA-owned (as part of Grupo Bimbo's snack division) chip brand **Takis** selected WPP's VML as its global creative AOR following a review. The agency will handle all creative duties.
- Candy maker **Just Born** selected Cincinnati-based independent agency Curiosity as its integrated AOR following a review and as part of a consolidation and replacing several project-based agencies. Just Born will handle creative, strategy, media, analytics, and social for the brand's portfolio including Mike and Ike, Peeps, and Hot Tamales. The agency will partner with other specialty roster agencies such as Coyne PR and Liquid.
- Pizza chain **Papa John's** selected Publicis Groupe-owned Leo Chicago as its new creative AOR following a review, replacing now Omnicom-owned and incumbent The Martin Agency. The agency will partner with the brand's media AOR, Dentsu's Carat.
- Unilever's ice cream spin-off, **The Magnum Ice Cream Company**, selected Publicis Groupe as its media AOR following a review, replacing incumbent WPP Media's Mindshare. The agency will handle all media planning and buying duties for its brand portfolio including Magnum, Ben & Jerry's, and Cornetto.
- The **Almond Board of California** selected WPP's Grey New York as its new integrated AOR following a review. The agency will handle all integrated marketing duties including creative and new campaign work.
- Restaurant chain **Tropical Smoothie Café** selected Minneapolis-based Fallon as its creative AOR following a review. The agency will handle all creative duties including strategy, integrated marketing, advertising, and creative.

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Insurance

- Mutual insurance group **Sentry** selected St. Louis-based ad agency HLK as its media and brand AOR following a review. The agency will handle brand strategy, creative development and production, and media planning and buying.
- **Pacific Life insurance** selected Omnicom Group agency GSD&M as its integrated AOR following a review and replacing multiple incumbents. The agency will handle creative, strategy, media buying and planning, and social.



Relationships matter. Treat each other like partners. We all want the same outcome: to perform better and solve problems to deliver solutions that benefit our patients.”

—Kyle Peckens, VP of Commercial Indirect Procurement, **Pfizer**



Personal care

- **Edgewell Personal Care's Schick Hydro Silk** selected indie full-service agency Bandits & Friends as its lead creative AOR. The agency will handle brand and creative work for the women's razor line.
- Haircare brand **Odele** selected Minneapolis full-service marketing communications agency Haberman following a review. The agency will handle national media planning and buying, influencer marketing, and asset production.
- **Ulta Beauty** selected VaynerMedia as its lead customer-first social and creative AOR without a review. The agency will handle all creative with a social-first approach, providing social-led insights that will then inform the brand's creative work across the funnel, and partner with the brand's in-house team.
- Wellness brand **Clean Simple Eats** selected January Digital as its media AOR following a review. The agency will handle media strategy and planning across Meta and Google.
- **Edgewell Personal Care** selected Publicis Groupe's BBH (Bartle Bogle Hegarty) USA as its creative AOR in the US following a review and expanding on prior work done with the agency. BBH will handle all creative duties for the brand's portfolio, including Schick, Playtex, Hawaiian Tropic, Banana Boat, and Wet Ones.
- Men's grooming products company **Manscaped** selected Chicago-based independent agency Quality Meats for its first Super Bowl campaign.
- Cosmetic surgery brand **Sono Bello** selected dentsu x as its digital media AOR. The agency conducted a pilot before being selected to lead all digital strategy work for the brand's portfolio of services, including breast augmentation, advanced liposuction, and procedures to remove excess skin.

Other

- Nonprofit trade organization the **National Association of Realtors** selected Uncommon Creative Studio New York as its creative AOR following a review.
- **UNICEF USA** selected independent Brainlabs as its full-service media AOR following a review, replacing incumbent performance marketing agency Delve. The agency will handle all media duties, including fullfunnel strategies, as well as full-service digital duties, including data, paid search, paid social, programmatic, strategy and planning, and SEO. The agency will partner with Said Differently on creative and email marketing.

Manufacturing

- Ohio-based tire maker **Goodyear Tire & Rubber Co.** selected Publicis Groupe as its global integrated AOR in a move to consolidate a roster of dozens of agencies including incumbents Omnicom Group's GSD&M and The Marketing Arm, and Stagwell's Colle McVoy. Publicis will handle all creative, media, production, and digital services via a bespoke team called Publicis PIT Crew. BBH USA serves as the creative lead in the bespoke team.
- Global manufacturer of motorcycles and scooters **Hero MotoCorp**, based in India, consolidated its media business with WPP GroupM's EssenceMediacom India following a review. The agency will handle all media business duties, including full-funnel media strategy, competitive market intelligence, planning, and execution across traditional and digital platforms for the company's brand portfolio: Hero, VIDA, and Harley-Davidson Business Unit.
- US defense contractor **Lockheed Martin** selected Stagwell's Gale as its creative and media AOR, following a review and replacing incumbents IPG's McCann and Mediahub.
- Power tools company **Stihl** selected (formerly IPG but now Omnicom's) The Martin Agency as its creative AOR following a review. The agency will handle strategy, creative, visual identity and design, social, activation, and production, and partner with sister agency MRM for e-commerce.



Pharma & health

- Pharma giant **Johnson & Johnson** selected WPP as its media planning and buying AOR for North America following a review, replacing incumbent J3, a dedicated unit formed by Interpublic 10 years prior. WPP will assemble a team composed of WPP healthcare specialist CMI Media Group and GroupM, along with other WPP units, and handle all paid media work.
- Pharmaceutical company **Eli Lilly** selected IPG-owned R/GA as its social AOR, working on the company's GLP-1 weight-loss drug Zepbound. The agency will handle social strategies and campaigns, and experience design, for Zepbound and other Eli Lilly brands.
- **Abbott Laboratories** consolidated its media business in the US and Canada with Publicis Media's Spark Foundry, replacing nutrition business US media agency Mindshare, owned by WPP's GroupM.
- Emergent BioSolutions-owned anti-opioid **Narcan Nasal Spray** selected Mile Marker as its media AOR following a review. The agency will handle analytics-driven media strategy, planning, and buying.
- Pharma giant **Bayer** selected IPG to handle global media, creative, and production services for its consumer health division (with brands such as Bayer Aspirin, Bepanthen, Claritin, and Canesten) following a review, replacing incumbents Omnicom and WPP.
- UK-based **Haleon** selected Publicis Groupe (for its over-the-counter drugs such as Voltaren and Advil) and WPP (for oral health and wellness products such as Sensodyne and Polident) as its global creative AORs following a review, splitting the account between the two agency giants and replacing incumbent IPG. The consolidation is meant to enable a "more simple, focused way of working."
- Pharma giant **Novartis** selected Publicis Groupe's Fallon as its creative agency for its next Super Bowl ad following a review, replacing incumbent Omnicom's Merkle+Partners.

Retail

- Department store chain **JCPenney** selected Mischief @ No Fixed Address as its creative AOR without a review. There was no incumbent on the account as the brand was handling the work in-house. The agency will partner with existing AORs Dentsu X (media) and Omnicom Group agency FleishmanHillard (PR).
- **Groupe SEB USA's** cookware-appliance firm selected Day One Agency (D1A) as its creative AOR for three of its brands (All-Clad, Rowenta, and T-Fal). The agency will handle all creative duties.
- Florida-based grocer **Publix Super Markets** selected the New York-based independent Fig as its creative AOR and Atlanta-based 22Squared as its media AOR following a review, replacing incumbent 22Squared, which handled both media and creative.
- Richmond, Virginia-based used-vehicle retailer **CarMax** selected Stagwell's 72andSunny Los Angeles as its creative AOR following a review, replacing six-year incumbent The Martin Agency. 72andSunny will handle omnichannel shopping, creative, and social media strategies, and brand identity, and partner with CarMax's sports sponsorship agency, Wasserman, and its media AOR. The brand also kicked off a review of its media account. Incumbent Dentsu X is expected to defend.
- **Dollar General** selected Dentsu-owned media agency iProspect as its paid media AOR following a review. The agency will handle all paid media duties, including media planning for both the discount retail chain and its retail media network, DGMN.
- Convenience store giant **7-Eleven** selected Interpublic media agency UM as its global media AOR. The agency will handle all media duties, including full funnel, cross-channel media strategy, digital media activation for 7-Eleven and sibling Speedway stores, and the company's 7Now delivery app.
- Swedish home goods retailer **IKEA US** selected WPP's Ogilvy-affiliated David as its creative AOR and DDB's Alma as its multicultural AOR in the US, replacing 15-year incumbent WPP's Ogilvy New York following a review. The agencies will partner with the brand's media AOR, Dentsu's Carat. The decision does not affect any of the company's other global agency partnerships, including IPG's McCann, Mother (UK), and Rethink (Canada).
- Electric pressure cookers, air fryers and small kitchen appliances firm **Instant Pot Brands** selected independent Chicago-based Cramer-Krasselt as its creative-media AOR following a review. The agency will handle media strategy and creative execution.
- Furniture retailer **Jordan's Furniture** selected IPG's MullenLowe US (part of the global MullenLowe Group agency network) as its first creative AOR following a review. The agency will handle all brand and creative duties for the New England-based retailer.
- National home-improvement retailer **Lumber Liquidators** selected Pinnacle Advertising as its integrated AOR. The agency will handle integrated marketing, media, and advertising solutions.
- Optical retailer **National Vision** selected WPP's VML as media AOR following a review. The agency will handle all media duties as well as brand identity and design, creative, customer relationship management, experiential, and social strategy for the brand portfolio, including its 1,200 stores under the America's Best and Eyeglass World brands.
- Pet supply retailer **PetSmart** selected Chicago-based media agency Empower Media as its media AOR following a review, replacing two-year incumbent independent shop Mediasmith. Empower Media previously worked for the brand.
- Retailer giant **Sam's Club** selected Publicis Groupe as its creative and media integrated AOR following a review, replacing incumbents Arnold and Horizon Next, a unit of Horizon Media, and consolidating its creative and media with one partner. The agency will handle paid media, social, and production, and set up a bespoke media solution within Publicis Media with a digital-first mindset, combining social-first creativity and analytical strength.



- Kingfisher-owned UK home improvement retailer **Screwfix** selected M+C Saatchi Group its lead creative AOR following a review. The agency will handle the new brand creative platform and campaign work.
- Solo Brands-owned **Solo Stove** selected Dentsu's Carat as its media AOR following a review, replacing incumbent independent shop PMG. The agency will focus all efforts on performance marketing, including performance media and paid search.
- Blender brand **Vitamix** selected Stagwell-owned agency Colle McVoy as its integrated AOR following a review, replacing five-year incumbent Cleveland-based independent agency Marcus Thomas. The agency will handle all duties, including creative, media, PR, social, and digital services across Vitamix's Household portfolio.
- Retailer of modern home furnishings **Scandinavian Designs** selected Quad/Graphics as its integrated AOR, working with two Quad agencies (Betty for creative and Rise for media) as part of a consolidation.
- **TJX Cos.** (parent company of chains including TJ Maxx) selected new creative AORs for its **HomeGoods** and **Sierra Trading Post** brands. HomeGoods selected Publicis Groupe's Fallon, replacing incumbent IPG's McCann, and Sierra Trading Post selected BarkleyOKRP, replacing incumbent Omnicom Group's adam&EveDDB, following a review.
- Discount supermarket giant **Aldi** selected Publicis Groupe as its global media AOR following a review. The agency created a dedicated unit to service the account called Aldi One. The holding company previously handled work in several markets (US and UK namely) through media agency Starcom.
- Supermarket chain **Grocery Outlet** selected Oakland, California-based media agency H/L as its media planning and buying AOR following a review. The agency will handle all media duties to drive awareness, store visits, and sales.
- Supermarket chain **Hy-Vee** selected Dentsu's iProspect unit as its media planning and buying AOR. The agency will handle all "enterprise media" for Hy-Vee and its affiliates. iProspect is expected to leverage Dentsu's Mercury identity data capabilities as part of the agency's scope.
- Commercial realtor **JLL** selected B2B agency Stein (part of MSQ Partners) as its global strategic and creative AOR following a review. The agency will handle strategy, creative, and go-to-market activities with a focus on global brand awareness and customer experience.
- Lakeland, Florida-based supermarket chain **Publix** selected New York-based Known as its media AOR following a review, replacing incumbent 22Squared, which handled creative and media. The agency will handle all media duties for more than 1,400 stores. The agency is expected to collaborate tightly with the brand's newly appointed creative AOR, Fig.
- Georgia-based kitchen, bath, and lighting company **PDI** selected Ammunition as its integrated AOR following a review. The agency will handle strategy, creative, media, e-commerce, social, influencer marketing, production, SEO, and analytics.
- Discount retail company **TJX** selected Publicis as its media AOR in the US following a review, replacing seven-year incumbent WPP's Mindshare. Publicis will handle media planning and buying for the brand portfolio including TJ Maxx, Marshall's, and HomeGoods.



Technology

- Design software company **Autodesk** selected independent Giant Spoon as its first creative AOR following a review. The agency will handle all brand campaigns, creative assets, strategy, and media efforts working with the company's in-house team.
- UK-based programming network **Sky** selected Publicis Groupe as its media AOR for its top European countries (UK, Ireland, Austria, Switzerland, Germany) following a review, replacing incumbent WPP (which retains work in Italy).
- Tech giant **Adobe** selected Omnicom and its Omnicom Precision Marketing Group as its global marketing AOR for its digital experience and other enterprise solutions (Adobe Experience Manager, Adobe Target, and Adobe Experience Platform) following a review. The agency will handle strategic support in campaign development and customer journey creation, including content creation and assets, deployment, messaging, personalization, and media engagement and insights.
- Microsoft-owned professional social media network **LinkedIn** consolidated its global media business with Publicis Media following a review, replacing incumbent Dentsu. The agency will handle media planning and buying duties for the brand.



- AI startup **Anthropic** (behind the Claude chatbot and rival to ChatGPT-maker OpenAI) selected IPG Mediabrands as its media AOR in the US. Through IPG Mediabrands' UM, the holding company also manages media buying for Perplexity, an AI-powered search tool.
- **OpenAI** selected Omnicom Media Group's PHD as its global media AOR. The agency will handle global media buying and planning for OpenAI and its ChatGPT brand. IPG Mediabrands handles media for competitors Anthropic and Perplexity. Creative duties have historically been handled in-house or by external agencies such as Accenture Song.
- AI-powered enterprise workflow management platform **ServiceNow** selected Dentsu X as its new global media AOR, replacing one-year incumbent PMG.
- Cloud software giant **Salesforce** selected Dentsu's iProspect as its global performance media AOR following a review, replacing the incumbent in-house agency. The agency will partner with IPG's Initiative, the firm's brand AOR.
- Mozilla web browser **Firefox** selected Whalar as its global creator AOR in a move to win over Gen Z in the US and Europe. The social and creator marketing shop within Whalar Group expanded its original US-based, project-based scope.
- Uniti Group-owned internet provider **Kinetic** selected McCann Detroit as its advertising and creative AOR. The agency will handle all creative duties, including brand transformation, social, and digital.
- Microsoft-owned business social platform **LinkedIn** selected IPG's McCann as its global creative AOR following a review. The agency will collaborate with the newly appointed AOR, Publicis Media, and its global creative strategic AOR for LinkedIn Ads, R/GA.
- Software company **Qualtrics** selected San Francisco based ROI·DNA as its full-service B2B digital marketing AOR following a review. The culture-first agency is part of Hotwire Global and The Enero Group. The agency will handle paid media strategy and execution across global and local markets, including paid search, social, and programmatic channels.

Travel & accommodations

- **Lufthansa Group** selected DEPT as its new digital AOR. The agency will handle brand and media, customer experience, technology and data, and end-to-end digital experience for the airline.
- **Alaska Air Group** consolidated its media and creative agency duties with Universal McCann and Mekanism, respectively. Mekanism has been Alaska Airlines' AOR since 2016 and now serves as strategy and creative AOR for the brand. UM will handle media planning and buying.
- Airline company **Breeze Airways** selected Walrus as its first creative AOR without a review. The agency will partner with the in-house media agency team.

- **Hyatt** selected Stagwell agency Assembly as its global media AOR as part of a consolidation exercise. The assignment includes a data-led approach, innovative thinking, and media duties for Hyatt's five brand portfolios (Luxury, Lifestyle, Inclusive, Classics, and Essentials) and supporting the loyalty program known as "World of Hyatt."
- Global cruise liner **Princess Cruises** selected Stagwell-owned 72andSunny as its integrated AOR in the Australian market. The agency will handle local brand positioning and integrated advertising campaign duties.
- **Southwest Airlines** selected Publicis Groupe-owned shop Leo Chicago to join the creative agency roster following a review. The agency will collaborate with Southwest's agency partner of 44 years, Omnicom's GSD&M, based in Austin.



Procurement offers so much more than just negotiating scopes and finding cost savings."

—Veronica Santiago, Global Commodity Manager, Marketing, **Dell Technologies**

Dell Technologies

- National passenger railroad **Amtrak** selected the Nashville-based incumbent Little Buddy Agency as its social creative AOR following a review.
- **Loews Hotels** selected digital marketing agency New Engen as its digital AOR in a move to drive strategic digital impact across its portfolio outside of Orlando. The agency will handle CTV and streaming, paid social, paid search, advanced analytics, and measurement.
- Convenience store and gasoline retailer **QuikTrip** selected Chicago-based agency Laughlin Constable as its new integrated AOR following a review, replacing incumbent WPP's VML. The agency will handle creative and media duties, including brand and promotional campaign strategies, data-driven media planning and buying, and omni-channel creative and production.
- **Resorts World Las Vegas** selected Santa Monica-based, full-service independent agency RPA as its new integrated AOR. The agency will handle media planning and buying, creative, and messaging strategy for the casino brand and its properties: Las Vegas Hilton at Resorts World, Conrad Las Vegas at Resorts World, and LXR, Hilton's network of independent luxury properties, which operates as Crockfords Las Vegas.



Services

- **Verizon** hired Wieden+Kennedy as its social media AOR to handle its consumer and business groups following a review, replacing nine-year incumbent Interpublic Group's R/GA. W+K is leveraging its social media-focused Bodega unit and will partner with the brand's creative AOR, WPP's Ogilvy.
- Consolidated Communications Holdings-owned **Fidium Fiber** selected independent New York-based Bray & Co. as its creative AOR and independent Minneapolis-based Novus as its media AOR following a review. Bray & Co. will handle all creative duties. Novus will handle media planning, buying, analytics of digital media, and television, radio, and OOH.
- **Hertz Global Holdings** and its car rental brand Hertz selected Austin-based independent shop Preacher as its creative AOR following a review, replacing incumbent Clearwater, Florida-based shop FKQ. FKQ will continue to handle media planning and buying duties. Shadow Lion will continue to handle social media.
- EV charging network **Ionna** (a joint venture founded by eight automakers: BMW, General Motors, Honda, Hyundai, Kia, Mercedes-Benz, Stellantis, and Toyota) selected WPP's VML as its creative AOR, responsible for brand creation and design duties, following a review.
- Cable and internet provider Charter Communications's **Spectrum** selected London-based VCCP and Horizon Media as its new lead creative and media AORs, respectively, following a review and replacing various incumbents (Dentsu's iProspect, PMG, Something Different).
- Wonder Group-owned online food ordering company **Grubhub** selected New York-based independent Walrus as its creative AOR following a review. The brand previously handled work in-house. The agency will handle all creative duties and partner with the media AOR, IPG's UM.

- Self-storage company **Prime Storage** selected Generator Media as its media AOR following a review. The agency will handle strategic planning, buying, advanced measurement, and ongoing optimization across digital, social, programmatic, and specific high-impact channels.
- Telecommunication giant **T-Mobile** selected Monks as its first social media AOR following a review, previously handled by several roster agencies including lead creative agency Dentsu Creative, VM, and Monks. The agency will handle all social duties, including leading paid and organic social content for T-Mobile's brands and businesses. VML-owned Village will continue to lead creator marketing for T-Mobile while Open Influence handles creator marketing for Metro by T-Mobile.
- European telecom giant **Vodafone** selected Dentsu agency Carat as its media buying AOR in 11 markets in Europe, the Middle East, and Africa (EMEA), a three-year contract, following a review. Carat retains the account after its initial three-year engagement. The agency will also continue to support Vodafone's efforts to bring more media buying in-house.
- Container logistics and supply chain services giant **Maersk** selected WPP Media as its media AOR following a review, replacing incumbent Havas Media. The agency will handle all media planning and buying in 130 countries from a hub in Copenhagen.
- Carpet, upholstery, and air-duct cleaning service firm **Stanley Steemer** selected Havas Chicago as its new creative AOR following a review. The agency will support all creative duties for the 275 franchises in 49 states.

2025: Agency Reviews & Roster Changes

Scan here or visit agencymania.com/2025-agency-reviews-and-roster-changes-guide to view and download the consolidated list of Agency Reviews and Roster Changes from our 2025 Industry Updates.



2025: Agency Reviews & Roster Changes

2025: Agency Reviews & Roster Changes

2025: Agency Reviews & Roster Changes

| CLIENT | REVIEWED | CHANGES | FOCUS AREA | NEW AGENCY | REVIEWED |
|-----------------------------|--------------------|---------------------|---------------------------|------------|-------------------|
| Apparel & luxury | | | | | |
| BEYOND DIGITAL | Beyond Yoga | Unknown | Integrated AOR | Unknown | Link |
| BROOKS | Brooks Running | Unknown | Media AOR | USA | Y |
| GORE-TEX | Gore-Tex | Unknown | SEC AOR | EMEA | Y |
| HONMA | Honma | Local Agency | Creative AOR | Global | Multiplus Group |
| JD Sports | JD Sports | None | Media AOR | Unknown | Empower Media |
| LVMH | LVMH | Publicis | Media | EU | Havas |
| PANDORA | Pandora | Unknown | Media AOR | Global | Dentsu |
| PUMA | Puma | Unknown | Creative AOR | Global | adidas+ODD |
| RED WING SHOES CO. | Red Wing Shoe Co. | Unknown | Social AOR | Unknown | The Social Lights |
| RHONE | Rhone | Brand-specific | Media AOR | Unknown | Kapler |
| ROLEX | Rolex | Digital's Authority | Integrated AOR | Global | Cap |
| ROUSE SIMMONS | Rouse Simmons | Kapler | Media AOR | Unknown | Dexter Media |
| SENDERO | Sendero Provisions | Unknown | Creative and Cultural AOR | Unknown | Battery |

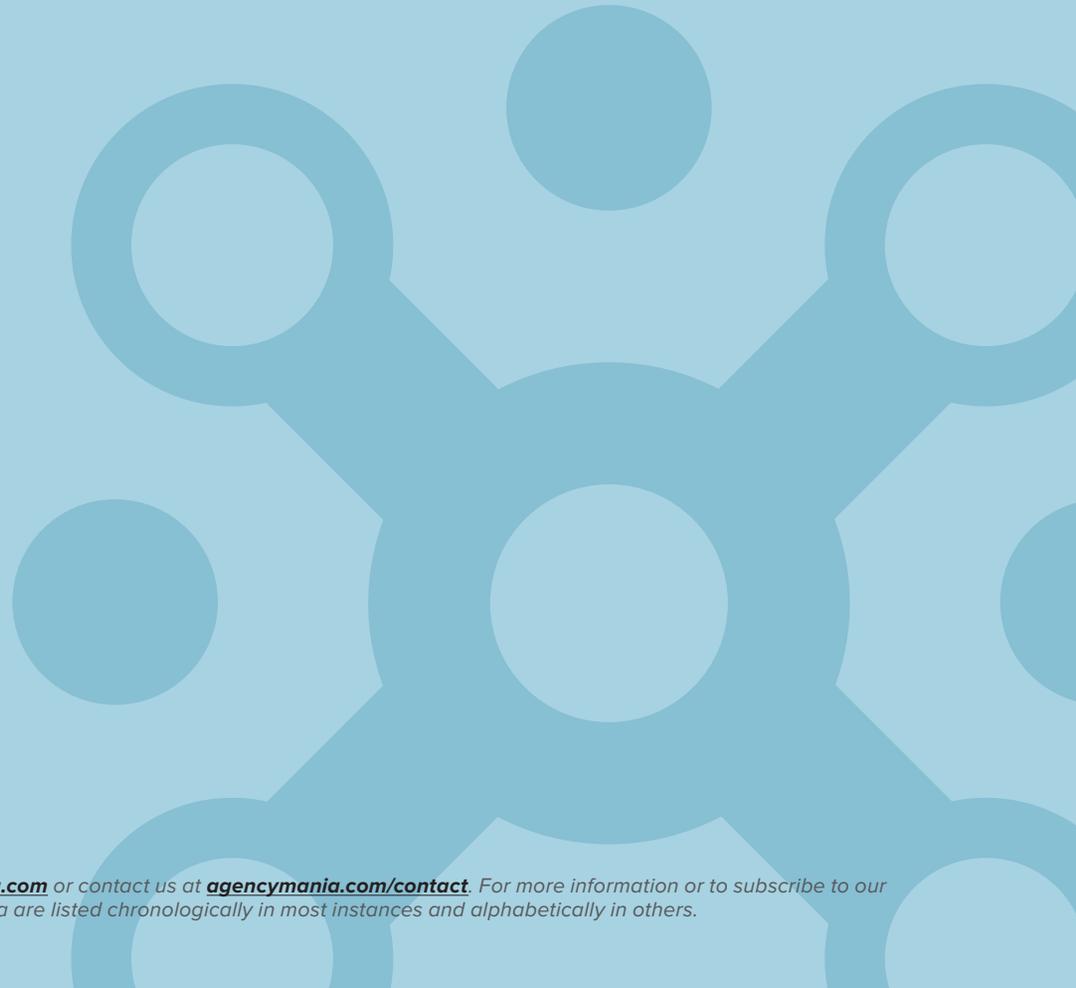
- **Super Star Car Wash** selected Nashville-based The Mayor as its integrated AOR. The agency will handle brand building, creative, digital, social, CRM, and out-of-home campaigns.
- **T-Mobile** shifted its agency model, moving most of its lead US creative agency work from Dentsu to in-house for creative strategy, production, and execution with the goal to move faster, operate more efficiently, and stay closely aligned with the needs of its customers. No other change is expected to the roster, which includes Monks as its social AOR, IPG Mediabrand as its media AOR, and also BarkleyOKRP for its Metro by T-Mobile business and Panay Films, among others.
- Lawn care company **TruGreen** selected WPP Media as its media AOR following a review, replacing incumbent Tinuiti. The agency will handle all media planning and buying duties while leveraging Open Intelligence, WPP's proprietary data solution. The brand is also expanding its relationship with sibling agency VML as part of the move.
- Leading veterinary care organization **Mission Pet Health** selected independent marketing agency Acadia as its media and analytics AOR following a review, replacing incumbent Atlanta-based Cardinal. The agency will leverage its Acadia Analyze, the agency's proprietary AI-powered analytics platform.
- Auto service franchise company **Midas** selected independent Pittsburgh-based ad agency Where Eagles Dare as its creative AOR following a review, replacing incumbent Barkley. The agency will handle brand strategy, full-funnel creative across a variety of channels including broadcast, digital/social, photography, and PR-driven activations.
- Professional services giant **PwC** added WPP's Ogilvy to its agency roster to handle creative and production in the US. Omnicom's McCann continues to lead PwC's global creative remit. Ogilvy will collaborate with McCann, which maintains a global mandate.
- Driven Brands-owned fast oil change and light maintenance chain **Take 5 Oil Change** selected Atlanta-based Dagger and dentsu x as its creative and media AORs, respectively, following a review, replacing various project-based incumbent agencies.
- UK-based telecom giant **Vodafone** selected Publicis Groupe as its creative AOR following a review as part of a consolidation, replacing multiple incumbent agencies. The agency will handle all creative duties for the flagship brand and five operating companies globally and across local markets in Europe, the Middle East, and Africa. Publicis Groupe built a bespoke team of handpicked creatives, analysts, and account leaders and will leverage Leona, its AI-driven content creation platform (with creators and influencers) to generate real-time, insight-driven creative content.





Talent:

Securing the right talent
& resources







Year-end summary

January-February 2025 | Volume 80

No doubt the advertising world is in rapid transformation. The best way to predict the future is to invent it. It's not just AI, it's the massive investment in technology and infrastructure by tech advertising giants like Google and Amazon.

For example, Meta, the parent of Facebook, Instagram, and WhatsApp, is planning to build a 40,000+-kilometer fiberoptic subsea cable around the world, at an estimated cost exceeding \$10 billion. The cable, of which Meta reportedly would be the sole owner and user, would span from the US East Coast to India via South Africa and then to the US West Coast from India via Australia. More details about the plan are expected in early 2025. The cable would provide Meta with a dedicated pipe for data traffic around the world.

This is just one example of companies investing in massive capabilities that go beyond our traditional understanding of what constitutes marketing and advertising.

March-April 2025 | Volume 81

The evolving marketing landscape in 2025 is defined by AI advancements, agency restructuring, and shifting consumer engagement trends.

Mitchell Caplan outlines five key steps for optimizing agency rosters, emphasizing clear goal setting, strategic evaluations, and ongoing adjustments. Kantar and Meltwater predict trends such as the rise of total video, AI regulation, the creator economy, and evolving social media dynamics. CMOs face challenges in balancing analytics with creativity and in driving organizational agility. AI investment is surging as major tech firms commit more than \$215 billion.

Meanwhile, OpenAI's Operator and Amazon's Brand+ signal AI-driven marketing shifts. Agencies like Maximon.ai, Daivid, and Alembic integrate AI for creative testing and analytics, while new agencies emerge, including Super Nice and Studio Secret Cinema. AI plays a growing role in ad performance prediction, with Dentsu's Adobe GenStudio Dentsu+ enhancing content supply chains. Despite AI's potential, Gartner notes that 27% of CMOs remain hesitant, while high performers leverage AI for creative and strategic development.

Major players, such as WPP, Accenture Song, Omnicom, Publicis Groupe, Havas, IBM Consulting, Interpublic Group, Monks (formerly Media.Monks), and Stagwell, are working with Adobe to build out tailored uses of Adobe GenStudio for their proprietary platforms and operating systems.



DROWNING IN DATA, STARVING FOR INSIGHT

"KPI Deliver unifies every agency-related data point into a single source of truth. Instead of fragmented tools, marketers gain a single dashboard covering rosters, finances, scopes, efficiency, staffing, and more. This unified view directly addresses the tech integration crisis and creates shared accountability across marketing, sales, and agency teams."

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

Contributed by: A&MPLIFY by Alvarez & Marsal

65% of CEOs don't trust their CMOs. And they're right not to. Too many marketing leaders still show up with vanity numbers—clicks, impressions, leads—that the board couldn't care less about.

When profits fall short, marketing is first to take the hit. 45% of the time, your budget gets cut before anyone else's. Why? Because leadership doesn't believe you can prove impact. In a downturn, you're seen as a discretionary spend, not a growth engine.

There is the existential crisis facing every marketing leader. Global data creation is exploding past 180 zettabytes this year. We're richer in data than at any time in history, but poorer than ever in insight.

That's the paradox: You're not starved for numbers; you're drowning in them. But most organizations can't turn their vast wealth of information into actionable business insights. Only CMOs who can draw a straight line from marketing activity to EBITDA will survive.

The rest? Cost centers waiting to be cut. The time for ruthless KPI accountability has begun.



Scan this code or visit agencymania.com/drowning-in-data-starving-for-insight to read the entire white paper.

May-June 2025 | Volume 82

AI is center stage in terms of technological advancements, investment in building the next generation of capabilities, and legal and ethical concerns about copyright infringement.

Lately, OpenAI, Google, and other AI giants have been pushing for the right to more freely use copyrighted material to train their models, a controversial move as brands try desperately to protect their intellectual property. Is AI going too far? Entrepreneur Jerome Dewald faced backlash after using an AI-generated avatar to appear before a judge without disclosure. The court criticized the act as misleading and stressed the importance of in-person authenticity in legal proceedings.

Bipartisan groups of federal lawmakers have reintroduced the NO FAKES Act, which would regulate the use of AI for digital replicas and deepfakes. How about marketing?

July-August 2025 | Volume 83

You may have heard that headline: “AI Is Here and You’re Behind.” Fueled by FOMO, everyone seems to jump headfirst and then figure out how to swim. AI is being embedded in every facet of society, and it’s not always uplifting. Pope Leo XIV called AI an “existential threat” to humanity. Amazon CEO and President Andy Jassy wrote to employees detailing how AI will change every part of Amazon and may lead to staff adjustments.

Studies and research point to the same conclusion: AI is transformational at many levels, so brace for impact as it’s here to stay and grow in scale and importance. Some think that AI is a bubble and that many AI-hyperfocused companies may be overhyped and overvalued. Maybe.

Can agencies afford to miss riding the giant wave that now seems unavoidable? Forget the bubble metaphor. It’s more like a snowball that started the avalanche you are now under. Take a look at our fast-growing section dedicated to AI news, which appears later in this Talent practice area.

September-October 2025 | Volume 84

Large agencies, ad-tech firms, and platforms are doubling down on AI to eliminate routine tasks and unleash strategic creativity. AI is reshaping the marketing landscape—from automation and personalization to precision media and performance intelligence—turning CMOs into transformation architects.

Publicis Groupe now attributes more than 70% of its revenue to AI-powered work, while WPP, Accenture, and Google are investing billions to integrate agentic AI across operations. Horizon Media’s Blu platform, MiQ’s Sigma, and tools from PubMatic and Similarweb are redefining programmatic buying and media optimization. At the same time, brands like Mondelez, Bayer, and General Motors are using AI to cut costs, speed production, and boost creative quality.

Industry events highlight a broader evolution: the fusion of data and emotion, the rise of outcome-based commercial models, and a creative renaissance fueled by AI insights. As global ad spending by the top 50 advertisers jumped 6.6% in 2024 to \$291 billion, leaders are asking where to insource instead of partner—and how to harness AI not just for efficiency, but for growth.

November-December 2025 | Volume 85

The agency universe isn’t just shifting—it’s exploding into a new cosmos of possibility. After acquiring Interpublic Group, Omnicom is now the world’s largest agency, based on total combined revenue of \$26.4 billion in 2024, ahead of Accenture Song (recently moving to second place) and WPP. Publicis Groupe holds the fourth position.

Even though the share price has dropped 31% since the merger was announced, there is optimism in the marketplace that the combined entity will energize other holding companies and ultimately benefit brand advertisers. On the creative side, Omnicom retired agency giants DDB, MullenLowe, and FCB, which are now folded within its top-tier brands—BBDO, TBWA, and McCann.

The mega-merger has been a topic of conversation across the entire industry, and competitors are paying close attention. Rumors of merger discussions between WPP and Havas emerged, which happened to be just that, rumors, and quickly refuted by Havas.

“Global advertisers must explore new, innovative ways to empower their marketing teams and agency talent while realizing greater commercial and financial value from these strategic relationships”

Bruno Galpois Co-Founder and Principal





Key takeaways & predictions

» GAME CHANGING

- Per the World Federation of Advertisers, **five predictions for 2025**:
 1. Retail media nears maturity
 2. Balancing sustainability commitments with business realities
 3. A year of reckoning for food and alcohol marketing
 4. Tech will sharpen the focus on people and culture
 5. Back to fundamentals (again)
- Key takeaways from the **2025 Association of National Advertisers Masters of Marketing** conference, the world's largest marketing conference, included: a change in the CMO role to "transformation architect"; the use of AI in creativity but also in precision targeting and personalization; relentless consistency in brand building; media waste reduction; and decisions about what core strategic capabilities, such as strategy, social media and analytics, to in-source instead of outsource to agencies.

» HIGH IMPACT

- Per Meltwater, **top 2025 marketing trends**:
 1. AI reshaping content marketing
 2. Increased AI regulation
 3. The booming creator economy
 4. The growing misinformation challenge
 5. Positive reputation management
 6. Social media overtakes linear TV
 7. Threads going mainstream
 8. TikTok huge but facing uncertain future
 9. Reddit, a sleeping giant
 10. Peer-to-peer recommendations
 11. Growing generational divides in social
 12. Easier data-driven PR
 13. LinkedIn's continued growth
 14. Personalized campaigns now essential
 15. Trend jacking to boost reach
- Per FastCompany, today's **CMOs face three core challenges**:
 1. Balancing analytical rigor and creative strategy
 2. Dismantling organizational silos for true customer-centricity
 3. Leading agile transformation in dynamic markets, a challenge that requires CMOs to be part visionary, part pragmatist, and part organizational psychologist
- Per Gartner, **top six 2025 marketing predictions**:
 1. CMOs will build AI experimentation into their mobile app road map
 2. CMOs will invest in talent and content to adapt for gen AI-powered search
 3. CMOs will shift 30% of their budget to subscription-based social platforms
 4. CMOs will build brand trust by embracing uniform pricing
 5. CMOs will increase offline investment to support new content consumption patterns
 6. CMOs will prepare data for automated interactions led by AI agents

- Per **Adweek**, Gale is Media Agency of the Year.
- Per ID Comms, **top seven reasons to conduct a review/pitch**:
 1. Breach of contract
 2. Competitive conflict
 3. Persistent performance issues
 4. Significant business changes
 5. Need for consolidation
 6. Strategic realignment
 7. Market changes
- Per Ad Age, for the first time in history, the world's biggest agency company is not a legacy holding company with roots in the aggregation of iconic ad agencies; it is in consulting and tech. Tech-powered advertising and marketing services group **Accenture Song is the largest agency company in Ad Age's annual rankings**, taking the crown from WPP. (Once Omnicom's acquisition of Interpublic Group is complete in late 2025, Omnicom will take the first spot.) Revenue for the world's 25 biggest agency companies increased 3.6% in 2024, to a record \$153 billion. Worldwide organic growth for the top five legacy holding companies came in at an average of 2% in 2024. The top five legacy agency holding companies—WPP, Publicis Groupe, Omnicom, Interpublic, and Dentsu Group—accounted for nearly half (\$72 billion) of that revenue, up 3.7%.
- Stagwell issued its **ANA Masters of Marketing Recap "Transformation, Not Trends: 5 Shifts Shaping Marketing,"** highlighting the following:
 1. Brand building is the new performance play
 2. From reach to resonance (audience + context + relevance = resonance)
 3. Purpose that performs
 4. From AI experiments to enterprise change
 5. Digital tools, human rules
- Per the **AdForum Worldwide Summit**, the top six industry shifts underway are:
 1. The return to full integration after years of decoupling media, creative, and tech ("The future is about bridges, not islands")
 2. Social media's strategic elevation (merging community, culture, and commerce)
 3. The emotion-data paradox (human empathy, intuition, and emotional resonance)
 4. AI: the great equalizer and differentiator
 5. The commercial model revolution (outcome-based, subscription, and value-linked pricing, aligning fees to performance and business growth)
 6. A creative renaissance is underway (emotion as a growth driver, grounding strategies in human connection rather than pure performance metrics)

» NOTABLE

- Per Mercer Island Group, 21 mistakes marketers can avoid in their next **agency review**:
 1. No clear objectives
 2. No clear process
 3. Frequent changes in direction
 4. The wrong field
 5. Too large or too small a field
 6. Incomplete briefing
 7. No NDA
 8. No budget
 9. No SOW
 10. No MSA
 11. Poor Q&A and limited information sharing
 12. No work session
 13. Poor feedback
 14. A process that is too long or too short
 15. Requiring finished work
 16. Buying the shiny object
 17. Forgetting about chemistry and culture
 18. Not checking references
 19. No thorough onboarding of the new agency
 20. No disciplined transition process
 21. No plans for an annual 360
- Per Mitchell Caplan of Chameleon Collective, **five steps to effective agency roster changes**:
 1. Set clear goals—Are you aiming for cost savings, efficiency, or brand consistency? Define success first.
 2. Evaluate your current agencies—Identify duplications, inefficiencies, and top performers before making cuts.
 3. Choose the right lead partner—Pick an agency that aligns with your business strategy and has the expertise to scale.
 4. Communicate the transition—Keep internal teams and external partners informed to avoid disruption.
 5. Monitor and adjust—Measure performance postconsolidation and refine your strategy as needed.
- Per Kantar, **top 2025 marketing trends**:
 1. The voyage to total video
 2. Social media needs to up its game
 3. Safety first: generative AI must reassure marketers
 4. Sustainability and marketing must merge
 5. Brands tap into creator communities
 6. Woke and not broke: the inclusion imperative
 7. The puzzle of slowing population growth
 8. Stretching the limits of innovation
 9. Retail media networks are evolving 1
 10. Livestreaming: alive and kicking
- Per FastCompany, today's **CMOs face three core challenges**:
 1. Balancing analytical rigor and creative strategy
 2. Dismantling organizational silos for true customer-centricity
 3. Leading agile transformation in dynamic markets, a challenge that requires CMOs to be part visionary, part pragmatist, and part organizational psychologist

- Per The Drum, **top agencies to watch in 2025**:
 1. Code and Theory (Stagwell)
 2. Unlimited (Accenture Song)
 3. The Kitchen North America (Kraft Heinz's in-house agency)
 4. Fight or Flight
 5. Dept
 6. Coolr
 7. Hearts & Science
 8. Seen Presents
 9. AMV BBDO (Omnicom)
 10. Ledger Bennett (Havas)
- Per GeorgeCo, **13 tell-tale signs of agency BS** (with plenty of humor):
 1. Agency wins network of the year. Finishes the year 47% smaller.
 2. Agency fires just a few people every week to keep news of firings out of the press.
 3. Agency cuts \$250,000,000 of salaries. Calls it restructuring.
 4. Agency announces salary freezes. Gives CEO \$49,000,000 package.
 5. Agency cancels bagel Wednesdays, citing costs. Charters yacht in Cannes.
 6. Agency mandates three days in office. Not including weekends.
 7. Agency cancels DEI efforts. One year after pledging itself to DEI efforts.
 8. Agency asserts authenticity. In a statement written by AI.
 9. Agency allows dogs in office. Agency doesn't allow people over 50 in office.
 10. Agency quotes eponymous founder. Agency would never hire someone like its eponymous founder.
 11. Agency applauds its own nimble agility. It takes nine days to get a tweet approved.
 12. Agency praises self as borderless. Most employees also job-security-less.
 13. Agency says "every word must count." Presents 221-page pitch deck.





- Per **Stagwell**, according to Ad Age's 2025 Agency A-List, Anomaly is #3 and 72andSunny is #9; Code and Theory: B2B Agency of the Year; Gale: Business Transformation Agency of the Year.
- At the ANA's Agency Financial Management (ANA AFM) conference in Carlsbad, California, **AT&T** highlighted its three-year journey of transforming its marketing operations to enhance efficiency, optimize fees, and improve overall performance, in partnership with their in-house agency and external agency partners like BBDO. The presentation, "Revolutionizing Agency Management: AT&T's Innovative Approach to Marketing Transformation," featured their successful implementation of Agency Mania Solutions' platform for improved scope of work management, client-agency performance assessments, and overall roster management.



In uncertain times, playing it safe can sometimes be the most dangerous thing for a brand, and for an agency, it means you are playing at the level of a vendor, just answering a brief rather than being a true business partner."

—Sarah Collinson, CEO, **Havas New York**

HAVAS

- Per Jeffries Consulting, **top agency challenges related to traditional pitches**:
 1. Agencies spend \$75K-\$150K chasing \$2 million-\$4 million accounts
 2. Pitches stretch 10-12 weeks with custom work and travel
 3. Odds of winning are often 1 in 6 or worse
 4. Independent agencies are increasingly opting out (not due to fit but due to cost)
- The **agency world has changed significantly in the last century**. Per Ad Age, out of the top 22 global agencies in 1945, only four are still standing (Omnicom's BBDO and Interpublic's McCann, FCB, and No. 21 Campbell Ewald).
- **WPP** reached media singularity through its "large marketing model" named Open Intelligence, which is capable of turning "trillions of data signals" (WPP data and client data, combined with 350+ partners like Google, Meta, Snap, TikTok, and Experian) into real-time, predictive actionable intelligence across channels, markets, and consumers globally.
- **Indie Agency News** introduced its five pillars to serve independent agencies (278 members as of July 2025):
 1. Media + Editorial ("alive" content for members to use)
 2. Community (built-in social platform)
 3. Celebration (four Top 40 awards to celebrate indies)
 4. 15-Minute Member Consulting Sprints
 5. Business Development
- Per **RECMA's** Diagnostics Report, Omnicom media agency OMD Worldwide was named best-performing global media network, followed by Starcom, Zenith, Havas, and Initiative. At the group level, Publicis Media was named best performing, followed by Omnicom Media and WPP Media (previously in the top spot). By agency network in North America, Publicis Media's Spark Foundry was top ranked, followed by OMD, Starcom (also Publicis-owned), and IPG's Initiative. The top three performing agencies in EMEA were OMD, Havas Media, and Starcom. In LATAM the top three performers were Havas Media, Initiative, and UM. In APAC, they were OMD, PHD, and Mindshare. The fastest-growing agency over the past three years was Dentsu's iProspect, followed by Starcom, Hearts & Science, Zenith, and Spark Foundry.
- Per Haris Halkic, **most RFPs are a trap**, and agencies should walk if they see these signs:
 1. You weren't involved before it dropped. You're not shaping the deal. You're just filling out paperwork.
 2. No access to decision-makers. If procurement is the gatekeeper, you're flying blind.
 3. They won't share a budget. That's not a buyer. That's a tire-kicker.
 4. It reads like a feature checklist. No room for value = no room to win.
 5. You don't fit the ICP. Just because you can bid doesn't mean you should.
 6. You'd need to stretch your roadmap. That's not a sale. That's a trap.
 7. The timeline is rushed and rigid. Translation: "We already picked someone. We just need 3 quotes."



Talent

» GAME CHANGING

- **WPP** changed senior leadership in September. Cindy Rose, formerly of Microsoft, was appointed as the new CEO of WPP, replacing Mark Read, underscoring the critical role of technology for the large holding company and the need for change in light of suboptimal performance in recent years compared to other groups such as Publicis.

» NOTABLE

- Per Ad Age, seven rules for creating the **best-in-class combo of creative agency and brand in-house team** for breakthrough work:
 1. It's a marriage. It's not meant to be perfect. But the goal is shared.
 2. Strong marriages are built on unwavering trust
 3. Play angel's advocate
 4. Be clear on swim lanes
 5. Design a powerful feedback loop
 6. Let. Them. Cook.
 7. Protect the idea with your life
- Per Ad Age, agencies are increasingly hiring for **AI talent**, typically AI producers/content creators, AI content design managers, junior creative technologists, senior data scientists, directors of applied AI strategy, and media, as well as creative directors and copywriters. Mandatory skill sets are fluency in generative AI tools like MidJourney, Runway, DALL-E, Jasper, Copy.ai, and Writesonic and hands-on experience with large language models, prompt engineering, AI API, and AI content tooling (e.g., ChatGPT, Claude, Gemini). They also need to be comfortable shaping AI-integrated workflows to accelerate, enhance, or rethink content design.

Employment in the advertising industry

» GAME CHANGING

- **Omnicom's** acquisition of IPG led to significant job cuts—more than 23,000—related to restructuring and organizational changes. They took place in multiple waves. IPG cut 3,200 employees in the first nine months of 2025. After several rounds of job cuts, Omnicom recently announced 4,000 more. Omnicom Group comprises about 105,000 employees worldwide (85% professional, 15% back office) after the acquisition.
- One of the world's largest professional services firms, **Accenture**, laid off more than 11,000 employees, spending over \$2 billion in severance cost amid a significant global restructuring related to increased automation and the growing role of AI. The workforce now has 77,000 AI and data professionals. The company reported that generative AI projects accounted for \$5.1 billion in new bookings in the last financial year, up from \$3 billion the previous year. This announcement was followed by a wave of layoffs in the tech sector, including Salesforce, Amazon, and Meta—all linked to efficiencies realized by AI.

» HIGH IMPACT

- Cable and entertainment giant **Comcast** decided to move some of its work in-house as the company is shifting priorities and spinning off cable TV channels, including MSNBC, CNBC, and USA. The move led twodecade incumbent Omnicom agency Goodby Silverstein & Partners to reduce its staff.
- Per Gartner, **top five situations most likely to lead to a CMO's removal**:
 1. Failed to deliver promised results from marketing strategies (69%)
 2. Failed to adapt to significant changes in the business or marketplace (58%)
 3. Failed to earn the senior leadership team's respect (54%)
 4. Did a poor job communicating a strategic vision for the marketing function (41%)
 5. Failed to communicate how marketing metrics relate to business priorities (33%)

» NOTABLE

- **Expedia Group** downsized its in-house agency in a move it says is to drive greater creative agility and better serve its business and travelers. The group is streamlining and accelerating its creative development.

AI (Artificial Intelligence)

» GAME CHANGING

- **Procter & Gamble** revealed that the company is investing in automation technology and AI to bolster operations across several areas of business, including media, marketing, and production. The brand giant uses generative AI for concept ideas and then tests copy against thousands of in-market copy, and also automates media scheduling through algorithms. The automated process aims at cutting down the testing timeline from several months to just a few days and reducing costs.
- **Publicis Sapient** built a global partnership with Google Cloud to accelerate its adoption of generative AI. As a result, Publicis Sapient will create a dedicated Google Cloud business unit to address client demand for Google's AI technology, with dedicated resources to help customers plan, deploy, and manage generative AI projects.
- **Dentsu** used Azure AI Studio, Azure Machine Learning, and Azure OpenAI Service to develop a co-pilot to help employees interpret results via conversational chat, which reduced analysis time by 80%. Before the use of this AI technology, client-facing media planners might have to wait weeks to get what takes minutes now.
- New York-based business agency **Gale** reported 80% efficiency gains by using Alchemy.AI to query tens of thousands of variables from dozens of sources, vastly reducing the time spent on tasks like learning platforms, briefing dedicated research teams, and receiving output. Gale also reported generating media plans 20% faster. (Gale was named Adweek Breakthrough Media Agency of the Year, Ad Age Data & Analytics Agency of the Year, and #5 on the Ad Age A List).



- WPP’s **GroupM** announced that it will spend \$30 million educating and training its employees to work with AI. It says 70% of the people it hires already have experience with the technology. The firm believes that in the next five years no human will touch a media plan.
- **ChatGPT’s OpenAI** launched Operator, a generalpurpose AI agent that performs tasks autonomously and independently, such as booking travel accommodations, making restaurant reservations, and shopping online, all of which enable different kinds of automation. One can easily see how this type of AI functionality could be extended to marketing tasks.
- **Stagwell** appointed the network’s first chief AI officer, John Kahan, reporting to company chairman and CEO Mark Penn. The role will lead the integration and development of AI across Stagwell’s global network.




3 Key Industry Shifts Redefining the Future of Client–Agency Partnerships

The rules of engagements are being rewritten, and transforming what partnership truly means. agencymania.com



Scan this code or visit agencymania.com/3-key-industry-shifts-redefining-the-future-of-client-agency-partnerships to check out our article “3 Key Industry Shifts Redefining the Future of Client–Agency Partnerships”: The rules of engagement are being rewritten, and transforming what partnership truly means.

- **The Interpublic Group** appointed a new role of global head of AI commerce, working with tech leaders across the holding company to develop agentic commerce solutions for clients, integrating data provided by Intelligence Node into agentic platforms and building partnerships with key players in the commerce ecosystem, including Salsify, Pacvue, and Omnicom’s Flywheel.
- **OpenAI** released o3-pro, a reasoning model added to ChatGPT that can analyze files, search online, and complete other tasks. It scored especially well with reviewers on “comprehensiveness, instruction-following and accuracy.” It is built to allow longer answering queries and provide better and more accurate responses. OpenAI reduced costs by 80% for both input and output tokens.
- Per CNBC, **Meta AI** reached a milestone of 1 billion monthly active users across its family of apps, including Facebook, Instagram, WhatsApp, and Messenger (compared to OpenAI’s ChatGPT and Google’s Gemini, which have 180.5 million and 400 million monthly active users, respectively), doubling the 500 million monthly active users Meta AI reported in 2024. The integration of Meta AI into the search bars of Facebook, Instagram, and WhatsApp, coupled with the April launch of a standalone app, has made the assistant a seamless part of users’ daily interactions.
- Meta announced that it will enable **Facebook** and **Instagram** advertisers to create and target campaigns using AI tools by the end of the next year simply by using a product image and a planned marketing expenditure, competing directly with advertising agencies that provide this type of service. An internal study also claims that Meta’s AI-powered ad tools drove a 22% improvement in return on ad spend for advertisers last year. Mark Zuckerberg has stated that Meta will spend hundreds of billions of dollars on developing AI products and construct a data center nearly the size of Manhattan.
- Per business and revenue model strategist Tim Williams, **agencies must better monetize the value of AI**: The cost of licensing the most popular AI tools averages around \$120,000 for a 100-person agency (\$1,200 per person), yet agencies “unfortunately apply the same cost-based thinking to AI that they do their basic revenue model” (charging for that cost as they do for people), as the form of a “technology fee” equal to 2% to 3% of the total fee associated with a project. Six recommendations:
 1. Charge a set price for agency outputs powered by AI
 2. Charge a price for agency-developed programs that leverage AI
 3. Charge a price for using agency-developed AI tools
 4. Charge a price for the outcomes produced with the help of AI
 5. Charge for AI-as-a-Service
 6. In every area possible, aggressively use AI to do more work in less time
- Per **Publicis Groupe**, over 73% of its third-quarter revenue came from what the company defines as “AI-powered” work. In the connected media area (which includes data, media, CRM, social, and commerce), 80% of its revenue came from AI-powered work. In the intelligent creativity segment, a third of the revenue came from AI-powered work. Building agentic networks (created by Publicis Sapient, which represents 15% of the group’s revenue) for clients accounts for 10% of Publicis’s business.



- The World Federation of Advertisers released its “**AI for Marketing Procurement Purposes**” white paper, indicating that procurement professionals anticipate a wide range of GenAI applications, including in RFPs, negotiations, and external market assessment; compliance and risk mitigation; operational excellence, such as automating certain procurement processes and improving workflows; and category learning and capability development. The white paper states that “the traditional commercial model—built on timesheets, retainers, and FTEs—is increasingly at odds with the way marketing works today. A shift towards outcome or output-based remuneration, moving away from FTE/hours or mixed models that emphasize the latter could be one result.”
- WPP launched a new version of its marketing operating system, WPP Open, for smaller clients, called **WPP Open Pro**. The self-serve marketing platform provides integrated AI-powered tools to allow brands to build plans, develop strategies, evaluate audiences and the competition, generate insights, and produce and publish campaigns on major ad platforms on their own, at scale and in record times compared to traditional methods.
- An industry coalition launched an open technology protocol called **Ad Context Protocol (AdCP)** to standardize how AI agents communicate with one another and carry out tasks on behalf of humans. The open standard for agentic advertising aims to make AI agent technology more consistent across ad platforms and allow for interoperability, such as providing direct access to inventory to advertisers who can access specific publisher audiences and inventory directly without navigating complex programmatic infrastructure. Ebiqity, Yahoo, PubMatic, Optable, Scope3, Swivel, and Triton Digital are founding members of the coalition.
- The **General Motors** proprietary AI engine Metropolis produced on-brand, photo-realistic assets in minutes, eliminating reshoots and allowing GM to scale thousands of on-brand, hyper-personalized images monthly that are optimized in real-time. The platform is now evolving into a fully agentic workflow, able to generate entire commercials, from insights to finished films, significantly faster and cheaper.
- In strategic partnerships with AI research company Anthropic, **NVIDIA** is investing \$10 billion and **Microsoft** \$5 billion in a move to provide advertisers with the processing power for advanced advertisements and content, as well as analytics and data to measure performance. News reports said Anthropic will scale up its Claude AI model on Microsoft’s Azure platform, and use Nvidia’s Blackwell and Rubin semiconductors.
- **Publicis Groupe** accelerated production capabilities spanning global content studios, cutting-edge production capabilities (Harbor, its production and post-production studio and its social-first content production agency, Boomerang), its proprietary AI technology platforms, including GenAI partnerships, and global production hubs (five global hubs, 52 locations covering 200 markets). Leona, the world’s first Intelligent content agent (through a simple conversational interface connecting audience insight with creative assets), is at the core of Publicis Production to connect the entire content supply chain.
- **Google** updated its AI image-generation functions in Google Ads, releasing Nano Banana Pro (using advanced AI built on Gemini 3 and making it available to advertisers globally for free in Asset Studio and other Google properties. It provides creative and editing features (enabling the creation of complex, professional grade images in less than 10 seconds with the ability to add multiple products in one scene) to help reduce budgets and turn imaginative concepts into images in less time and improve ad performance. All media generated by this tool is embedded with its SynthID digital watermark.

The question many CMOs are asking...

“If My Agency Uses AI, Am I Overpaying?”

agencymania.com



Scan the code or visit agencymania.com/if-my-agency-uses-ai-am-i-overpaying to read the article “If My Agency Uses AI, Am I Overpaying?” where you can learn how to uncover five essential steps brands can take to modernize their agency compensation strategies and ensure they’re driving optimal ROI from AI-powered work.



» HIGH IMPACT

- Banking giant **Goldman Sachs** reported that 6.1% of American businesses were using AI for product or service production at the end of 2024, up from 5.9% in Q3. Companies with more than 250 employees had an adoption rate of 10%. 65% of CFOs cite limited ROI as a drawback to implementing AI across their organizations.
- AI continues to exhibit a remarkable influence on marketing. As such, the **ANA** named AI the Word of the Year in 2024 for a second consecutive year. It was selected by 65% of its members, followed by personalization, a distant second choice.
- **AdCreative.ai** launched its v9 and what it says is the world's first product video-shoot generator, transforming a simple product photo into product videos. The firm claims a 110% higher return on ad spend on average.
- **Coca-Cola** leveraged generative AI to create text, images, audio, and video through large language models. For the holidays, Coca-Cola worked with three AI studios—Secret Level, Silverside AI, and The Wild Card—to produce three versions of its fully generative AI TV commercial “Holidays Are Coming” (a classic ad originating from 1995).
- **Meta** launched its Movie Gen application, a new standard for immersive AI content that allows users to use simple text input to produce long, high-definition custom videos (at different aspect ratios) and sounds (sound effects, background music, or entire soundtracks that reflect the tone, rhythm, and style), edit existing videos, and transform image into unique videos. Production company Blumhouse created videos with Movie Gen to showcase the app's capabilities.
- Per Sorrell, **five areas where AI will significantly impact advertising and media:**
 1. Visualization and copywriting (two hours instead of three weeks)
 2. Hyper-personalization (and reduction of costs per asset)
 3. Media planning and buying (with greater reliance on algorithms)
 4. Agency and client efficiency
 5. Knowledge transfer (with flatter and more agile organizational models)
- Tech giants **Amazon, Google, Microsoft and Meta** committed billions to artificial intelligence investment in 2025, with a projected combined capital expenditure of at least \$215 billion, a 45% increase YOY. Meta will invest \$65 billion in AI infrastructure in 2025, including completing a massive data center in Louisiana to support its large language model and to compete with cloud providers like AWS and Google. Microsoft will invest \$80 billion in fiscal 2025 to develop data centers, while Amazon.com will spend more than \$75 billion. **Alibaba** announced an investment of \$52 billion in AI and cloud computing during the next three years, signaling China's broader ambition to lead in AI innovation while competing with US tech giants.
- **French President Emmanuel Macron** announced €109 billion (\$112 billion) in private investments in the AI ecosystem over the next few years following the Artificial Intelligence Action Summit hosted in Paris. French AI startups, such as Mistral, Wandercraft, and Owkin, are gaining momentum. The move is in response to the Stargate Project, the \$500 billion investment program led by OpenAI and SoftBank, to build multiple data centers for AI in the United States.
- More than 2,000 UK creatives signed a letter urging their government to uphold **copyright protections** as AI technologies advance, arguing that “AI training on creative works without proper compensation shifts wealth from artists to tech companies and could undermine human creativity.”
- **Amazon** launched a new AI product, Brand+, in its demand-side platform focused on connected TV advertisers. Brand awareness campaigns can be targeted based on data typically applied to performance marketing, like its AI-powered product Performance+.
- **Amazon** launched a new AI-based tool, Complete TV, within its demand-side platform, Amazon DSP, to enable advertisers to plan and manage TV (linear/programmatic/ streaming) budgets more effectively, including upfront commitments. The AI tool tracks the pacing of upfront commitments, identifies placement opportunities, and tracks reach and frequency.
- **AI marketing and analytics platform tools** such as Daivid, Alembic, and Wpromote allow brand advertisers to accurately predict how ads, before they run, will perform and how consumers will react. For example, Daivid's tool conducts detailed emotional analysis, measuring up to 39 sentiments. Wpromote developed an AI ad testing tool called Creative Audit, which uses 72 criteria to compile a score for how well an ad helps a brand meet specific objectives (e.g., lift, website traffic, sales). It can also be used for social to predict the social video creative that is most likely to perform best on TikTok, Instagram, and YouTube.
- When it comes to **AI and copywriting**, AI is already affecting the writing community, according to research from Stanford University, the University of Washington, and Emory University: “Over 65% of marketing professionals, 58% of journalists, and 47% of legal professionals now regularly use AI tools for content creation, representing a fundamental shift in professional writing workflows in just 18 months. AI-assisted content in certain contexts is now indistinguishable from human-written work in blind evaluations, though challenges persist with stylistic homogenization and factual reliability. Organizations implementing hybrid human-AI writing workflows report 37% greater content output and 22% cost reduction but struggle with developing appropriate governance and quality control mechanisms.”
- The **big tech players** are massively investing in AI. Alphabet, Microsoft, Meta, and Amazon are investing \$300+ billion in AI-focused infrastructure in 2025. Meta increased its 2025 target to \$72 billion. Microsoft plans to spend \$80 billion, and Amazon, \$100 billion.



- **OpenAI's ChatGPT** introduced an image-generation feature that has been utilized to create more than 700 million images from 130 million users within its first week, illustrating the growing demand for AI-driven creative tools.
- **Meta** launched the Meta AI app, bringing the capabilities of its Llama 4 model beyond its social platforms and into a standalone platform with text, voice, and image capabilities. Its existing Meta AI capability reached 700 million monthly active users in January alone. Meta projected that its generative AI products might contribute \$2 billion to \$3 billion in revenue in 2025, and \$460 billion to \$1.4 trillion by 2035.
- A **fake AI-generated KFC** ad produced by Serbia-based film company DaVinci Productions provoked creatives and fueled an industry debate over the role of AI in advertising, transparency, and intellectual property. Critics said the firm replicated shots from past KFC ads without proper credit. DaVinci Productions “analyzed” real brand campaigns for KFC to create the mock ad, including breaking down shots of food to understand their tone, lighting, styling, and emotional feel.
- Interpublic Group-owned global experiential agency **Momentum Worldwide** appointed its first global chief AI officer, recognizing that AI is a business priority and an investment area in advertising.
- Holding company **Dentsu** signed the EU AI Pact, a voluntary initiative led by the European Commission to promote responsible AI practices ahead of the EU AI Act's full implementation, joining 130 organizations, including Adobe, Mastercard, and Google. Dentsu announced that it launched a companywide training program with the AI Connective and its Live Learning Enablement Program. It also has enterprise-grade AI infrastructure and partnerships with Microsoft, Adobe, AWS, Google, and Salesforce and has developed 80+ AI solutions. Through its investment arm Dentsu Ventures, it also invested in AI startups such as Inworld, Fidder, and VidMob.
- Omnicom-owned influencer agency **Creo** launched a new generative AI tool (using Google's Gemini) built into Omni, its internal technology platform, and designed to connect brands with influencers.
- **L'Oréal Groupe** deployed Google's Imagen 3 and Gemini multimodal models as part of its generative AI beauty content lab, dubbed Creaitch, to help its marketing team's creative process and streamline production. Generative AI is used to create concepts, storyboards, and packaging redesigns and to test product pack shots in various locations, reducing turnaround times from weeks to days while trimming costs. However, the brand decided to not use generative AI to create images of people for marketing campaigns or external communications.
- **R/GA** launched the R/GA AI Search Optimization Platform, designed to help brands reach consumers who are often using AI search engines such as ChatGPT, Gemini, Anthropic, Perplexity, and DeepSeek, rather than traditional online search tools such as Google. The agency also plans to launch additional tools, including its Autonomous Storytelling Engine, to create content at scale with generative AI.
- WPP-owned **Landor** launched an AI-based offering called Intelligent Brand System, which acts as a safety check to define a company and its brands. It allows advertisers to evaluate if-then rules and see their impact against guidelines dynamically; for example, automatically checking a new ad's message or creative design against a brand's rules. Existing AI tools by Landor include Brand Touchpoint Intelligence and Knowledge Analyzer.
- **WPP** implemented AI tools and capabilities to enhance employee productivity, streamline business operations, and accelerate overall business transformation. Copilot and Copilot Studio were rolled out across WPP, and new Microsoft AI tools were integrated within the WPP Open user experience in Q1 2025.

Procurement is now the link between ambition and execution, risk and resilience, creativity and accountability. In the AI era, procurement isn't on the sidelines. It's in the driver's seat.”

—Ramzi Chaabane, Director, Marketing Indirect Procurement, Advocacy, Influencer and PR Agency Partnerships, **L'Oréal**

L'ORÉAL

- **Google** launched Autonomous AI Agents for marketers such as its Marketing Advisor in the Chrome browser, allowing brands to access information based on their specific objectives and provide tailored suggestions on how to achieve them. The tech giant is also introducing agentic assistants within its Ads and Analytics suites.
- **Morgan Stanley Wealth Management** and **E-Trade** launched an AI-driven set of capabilities including a “machine learning client marketing engine” that uses advanced targeting with an automated feedback loop to continuously capture customer preferences. The advertisers also introduced a marketing GPT (generative pre-trained transformer) in close collaboration with OpenAI, and it includes the launch of an AI assistant called Marketing Muse.
- Per **Boston Consulting Group**, 71% of marketers plan to invest at least \$10 million in generative AI over the next three years. 68% are already deploying or plan to deploy live-action style video generation without humans and for video enhancement, such as editing and supplementations.



- CPG giant **Unilever** launched an AI-driven design unit, Sketch Pro, in partnership with IPG’s creative production agency IPG Studios, to quickly deliver social-first content with aid from tools like Google’s Veo 3 and Adobe Firefly. Sketch Pro operates in London, São Paulo, Mumbai, and Jakarta, and Unilever plans to expand into 21 markets.
- **Stagwell** launched The Machine, the holding company’s AI-powered intelligence layer and operating system that aims to unify people (clients and agencies), tools (Adobe, Figma, and proprietary agency tools), and (customer) data into a seamless, collaborative experience for its teams and clients. Stagwell cites benefits including enhanced creativity (automating briefs to creating assets), elimination of silos, streamlined workflows, and improved performance (feeding and analyzing performance data in real-time).
- **L’Oréal Groupe** and **Nvidia** announced their partnership to unlock AI’s potential across multiple aspects of beauty to enable beauty experiences, leveraging the Nvidia AI Enterprise platform for rapid development and deployment of AI. One example is the scaling of 3D digital renderings of L’Oréal products, for a fusion of physical AI and generative AI to expand creative possibilities. The two companies previously collaborated on L’Oréal Groupe’s generative AI content platform CREAITECH and AI-powered multibrand marketplace startup Noli (“No one like I”).
- **Amazon Ads** launched an upgrade to its video generator for US advertisers that allows them to use AI prompts to create realistic motion shots for their products. Real product shots/videos (tutorials, demos, social content) can be combined with synthetic images and transformed into moving videos that appear in searches and product detail pages.
- The **ANA**, in partnership with outside legal firm Venable LLP, launched a standardized AI contract rider that can be added to service agreements between advertisers and agencies. The rider outlines the practical and legal aspects of using generative AI, including the need to disclose AI usage, the ownership of AI-generated work, and ethical considerations related to misinformation and data privacy.
- **Brandtech** produced more than 2 million AI ads for 5,000 brands since 2018, claiming to produce work 62% faster and 55% cheaper, which resulted in a 40% better ROI.
- **WPP** launched AgentBuilder Pro in WPP Open, a significant upgrade to its existing AgentBuilder tool that is powering more than 30,000 agents inside WPP. AgentBuilder Pro is a comprehensive suite of tools to enable the creation of more sophisticated agents.
- **WPP** integrated TikTok’s Symphony Content tools into WPP Open, its AI-enabled marketing platform. TikTok’s suite of generative AI tools comprises Symphony Digital Avatars, Symphony’s AI dubbing translation tool, streamlined content creation through a video generator, and more.
- **IPG** launched a new offering, Agentic Systems for Commerce (ASC), designed to help CPG brands manage their commerce ecosystems by leveraging automation and AI. To optimize commerce performance, ASC leverages Interpublic’s proprietary agentic system and is powered by data from Intelligence Node, the transaction data company Interpublic acquired in December 2024.
- **Interpublic** launched its “simulation studio” powered by new “agents-based” research, in partnership with AI startup Aaru. The studio is capable of simulating human responses to any scenario (including ad campaigns in private, political, and public sectors) with a speed and accuracy that human-based research methods can’t match. The capability is integrated with proprietary consumer data from Interpublic’s Acxiom unit.
- **Truth Collective** launched AI Bravestorm, a human-led, AI-supported creative sprint workflow and premium workshop experience that supercharges your marketing. Use cases include Brand Strategy (distill a brand’s positioning in days, not months), Naming (hundreds of AI-assisted, human-vetted names—instantly validated), Campaign Development (creative concepts and digital tactics ready for market activation), Content Strategy (clear, immediate road map and content calendars ready to deploy), and Zero to Launch (launch smarter, faster, and more strategically).
- Per IBM’s 2025 CMO study, “**The CMO revolution: 5 growth moves to win with AI,**” 64% of CMOs are accountable for profitability and 58% for revenue growth. Five growth moves:
 1. Forge an infrastructure that doesn’t flinch
 2. Heal your EX to fix your CX
 3. Hire for heart, train for AI
 4. Win the moment
 5. Stop chasing campaigns, architect outcomes instead
- **Magnolia** launched its AI-powered, generative strategic planning and brief writing tool, built exclusively for agencies as a research assistant and brief builder. Agencies can research clients, conduct business and competitive analysis, create strategic plans, and come up with ideas in minutes, not weeks, while preserving the agency approach and expertise.
- Per the **2025 State of Marketing AI Report** by the Marketing AI Institute, 60% of marketing teams are now piloting the use of AI or scaling out AI projects. 82% of marketers hope AI will reduce time spent on repetitive data-driven tasks. Another expectation is getting more actionable insight from marketing data (65%). Reducing costs was only #7 on the list (52%).
- San Francisco startup **AdsGency AI** raised \$12 million in a seed investment round to build an agentic AI operating system and agency for advertisers with AI agents running campaigns autonomously, including generating ads and placements. Tasks are to include strategic planning, multimodal content generation, and ad placement across channels, attribution, and optimization and integration with ad channels, including TikTok, Instagram, Pinterest, Reddit, and Google.
- Clothier **J.Crew**’s use of undisclosed AI-generated imagery sparked consumer controversy and claims of a lack of brand authenticity and transparency after several lifestyle images were posted on Instagram. The brand used AI.S.A.M, a London-based AI photographer that “merges the real with the artificial.”



- **AI “actress” Tilly Norwood**, the creation from AI talent studio Xicoia, a spin-off of Eline Van der Velden’s AI production studio Particle6, has been the center of a controversy after the AI model attracted the attention of multiple talent agents after her first role in the comedy sketch “AI Commissioner.” SAG-AFTRA the union representing actors and other performers, stated that it is “opposed to the replacement of human performers by synthetics” and that “creativity is, and should remain, human-centered.”
- Per the WFA, **AI’s impact on commercial models** is real. 22% of marketing procurement executives say the benefits have been clear for “some time,” while 32% report they are only just beginning to experience them—whether through faster processes, testing, or actual content delivery. 20% say they have started to develop some of their remuneration models, and 61% plan to do so. 44% are concerned about the environmental impact of new AI tools and approaches. 64% think the use of AI may increase environmental effects of their marketing activities, while 82% feel that the full environmental cost of AI was currently unknown. Only 5% are already measuring the impact of AI tools/vendors.
- A new tech platform called **Ad Legends** launched to “hire out” the digital personas of famous advertising creatives to agencies and brands. The creative style, past work, and philosophy of a legend are built into an AI agent to help generate ideas. The real-life legend earns royalties based on how often their persona is used. The firm, which operates as an SaaS-based agency hybrid, calls itself “the first fully functional AI-powered advertising agency” that gives instant access to top-tier creative thinking without human involvement.
- **CreativeX** launched a benchmarking tool to help brands measure the ROI of creator ad spend by comparing their content against industry benchmarks. The tool assesses how creator content performs against best practices and shows where budgets are wasted, allowing brands to optimize their strategies and prove the effectiveness of their investments. For example, by providing a Creative Quality Score (CQS), the tool helps brands improve their creative output, as a 10% increase in CQS can lead to a 6.3% reduction in Cost Per Completed View (CPCV), according to CreativeX.
- Pharmaceutical giant **Bayer** has been using CreativeX, the creative data and automation platform, for years to produce content at scale, evaluating its agencies’ creative output quality and effectiveness, scoring them against benchmarks before going to market while spotting low-quality creative receiving large budget to make adjustments. The brand states that it increased its creative quality coverage from 20% to 70% of its digital assets in one year.
- Packaged-food manufacturer **Mondelēz** uses a GenAI tool developed in partnership with Publicis Groupe and IT firm Accenture to cut costs for the production of marketing content by 30% to 50% and speed up how long it takes to produce content. The firm spent over \$40 million to develop that capability, and it is expected to be used in social media, video production, retail product pages, and more.
- **Virgin Voyages** partnered with Google’s Gemini Enterprise platform to develop a host of marketing and customer experience agents. The firm states that it operates more than 50 AI agents to assist internal teams as part of its personalized marketing (such as emails and landing pages) and customer experience efforts, reducing its annual creative agency spend by 35% and time to market from 5 to 6 weeks to 5 to 10 days.
- **Nestlé** launched a new AI-powered content service using digital twins to scale high-quality product visuals for e-commerce and digital media, developed in partnership with Accenture Song and built on NVIDIA Omniverse (NVIDIA AI Enterprise for Generative AI) and OpenUSD. It helps Nestlé’s Integrated Marketing Services, with 250 marketing experts in seven marketing hubs and 45 content studios around the world, deliver personalized, multi-format content and strengthen brand presence across online channels.
- **Mondelēz International** evolved its generative AI tool, AIDA (AI + Data), to produce content faster at lower cost and personalize its advertising for consumers while boosting engagement for many of its top brands, including Oreo, Chips Ahoy!, Ritz, and Perfect Bar. The brand spent upward of \$40 million on building the capability and expects the tool could cut the cost of creating marketing content by up to 50%.
- CPG advertiser **Reckitt** deployed generative AI (Gemini, OpenAI) to automate repetitive daily marketing tasks, speed up creative asset adaptation (a 30% lift), approve campaign artwork based on regulatory brand and legal rules, and monitor overall brand performance by combining Nielsen data with other internal and external data types (a 20 to 40% time gain efficiency). The brand identified 10 to 12 marketing activities AI could support without reducing agency dependency.
- Brands and agencies are **creating assets at scale using AI**. For example, The Brandtech Group, a techpowered group and alternative to the traditional holding company known for in-housing pioneer Oliver and its AI-drive production capability, created 235,000 pieces of content for top clients, including Unilever, at a pace 62% faster and 55% cheaper than previous processes in Q1 2025 alone using its Pencil Pro enterprise generative AI platform as part of its “content supply chain” efforts. Procter & Gamble’s AI Studio collapsed a 30-day, \$30,000 process (to prompt evaluations of new creative using prior copy test results) into a one-day, \$1,000 process.
- **WPP** and **Google** deepened their partnership, announcing a five-year expansion dedicated to advancing cloud and AI technology. It includes a \$400 million spending commitment from WPP for Google technologies. Other partnership components include rapid bespoke AI model development and bespoke AI solutions built with Gemini, secure, privacy-first data collaboration, early access to Google’s latest AI models (including Veo and Imagen), integrated within WPP Open, preferred access to Google’s cutting-edge AI, expansion of the Creative Technology Apprenticeship program with Google, and integration of Google’s advanced AI into WPP’s workflows (for tasks like automated data analysis, intelligent resource allocation, and instant access to global insights).



- **WPP** launched WPP Open Pro, a self-service version of its AI marketing platform designed to help brands plan, create, and publish campaigns on their own, in a move to compete with other tech platform providers (Google, Meta, Adobe) and target small and midsize companies.
- **Stagwell** announced a partnership with data analytics company Palantir to create an AI-driven platform that lets brands themselves manage campaigns, creative testing, and audience targeting. The new standalone solution (via Stagwell's suite of Marketing Cloud products) pairs Palantir's Foundry with Code and Theory's orchestration level software and Marketing Cloud's proprietary data sources and solutions. It allows brands to sift through tens of millions of records to identify, segment, and better understand audiences.
- Per **Chiefmartec**, **creative production tools** that are top AI innovators include: video creation platforms such as Descript, HeyGen, Runway, and Synthesia; leading DAMs such as Bynder, Canto, and Frontify; design platforms such as Adobe, Canva, and Figma; copywriting wizards such as Jasper and Superhuman (formerly Grammarly); and platforms to manage the end-to-end creative pipeline such as Adobe, Cloudinary, Gradiant, and Typeface.

» NOTABLE

- **Analytic Story Architects** launched its AI offering to assist brand advertisers bogged down by fragmented systems and having to spend excessive time searching for proof points. Per the firm, effective analytic storytelling improves business outcomes by 20%. ASA says it provides an analytic story that is evidence-backed, is objective-aligned, and drives measurable growth.
- **Waldo** states that its AI platform can generate a complete marketing strategy including competitor analysis, SWOT, and strategic recommendations in just two minutes instead of the traditional 44 hours. Waldo automates complex research tasks with dozens of workflows covering every aspect of brand strategy. Clients include Havas, IPG, Uber, WPP, Accenture, Conair, and BCG.
- Banking giant **Citi** announced that it's in the early stages of deploying AI capabilities across its marketing activities. Citi is focusing on three things: content creation, personalization, and validation. The company also rolled out new AI tools (e.g., Citi Assist, Citi Stylus) to its employees in eight countries, including the US, UK, and Canada, to assist with searching internal bank policies, and summarizing, comparing, or searching documents simultaneously.
- Per Google, snack food giant **Mondelēz International** produces 20 million creative assets in more than 150 countries and reported a 20% increase in ROI in the US and 10% globally by leveraging AI. Mondelēz recently partnered with Google Cloud to unify its datasets with AI to enhance marketing personalization.



- **Daivid** is a London-based AI-powered platform to test “lots of creative, all of the time” as a managed service (with its Insight & Strategy team delivering actionable insight that clients can implement immediately) or as a self-serve tool. Brands and agencies can conduct creative testing (attention, emotions, etc.) or get regular creative reporting, as well as conduct creative audits to predict effectiveness. Clients include Shiseido, Stellantis, Nestlé, Meta, Coca-Cola, Heineken, Alfa Romeo, DirecTV, and ADK.
- Per Vivaldi, there is **insufficient investment in AI talent and attention** to support deployment initiatives: 42% say their company lacks the talent needed to react and adapt to developments in AI.
- Use of **AI in creative production** made its way to the 2025 Super Bowl commercials with Mountain Dew “Kiss from a Lime” and Tubi “Born to Love Westerns.” Based on various ratings, results were mixed.
- Carnival Corp.-owned cruise line **Holland America** produced a 30-second regional spot Super Bowl commercial using CGI and AI platforms (image and video generators), including Midjourney, Stable Diffusion, Runway, and OpenAI’s Sora, depicting historical scenes created by generative AI. The spot was developed in-house with the production agency Deux Vingt.
- Per Ad Age, the **most popular AI video platforms** for creative agencies included: Chinese-based and Kuaishou-owned Kling; Adobe Firefly; Google Gemini’s Veo 2; OpenAI Sora; Chinese-based and MiniMax-owned Hailuo; Luma Labs-owned Dream Machine; privately owned Runway; and HeyGen, ComfyUI, and DaVinci Resolve.
- AI design startup **Flora** secured \$28 million in funding to support its upcoming AI-powered infinite canvas platform, which transforms rough sketches into polished designs while learning individual and team creative patterns. Testers report 40% faster ideation-to-execution workflows and 65% increase in design variation exploration. The platform is positioned as a new category of creative AI tools that act as collaborative partners rather than automation systems. The firm says it has a waitlist exceeding 12,000 professionals ahead of the Q3 2025 launch.
- **Monks**, the S4 Capital-owned digital-first marketing, technology services, and consulting company, launched an Agentic AI Advisory Group to accelerate the use of Nvidia technology to create agent pipelines for brands. Its “Monks Foundry,” a team of 150 engineers, will power the advisory group.
- Per Christine A. Moore, managing partner at RAUS Global, **to effectively harness AI within agency relationships** (based on the Women in Marketing Procurement Forum), marketing procurement leads must:
 1. Demand proactive transparency
 2. Incorporate robust AI clauses
 3. Understand agency overheads and margins
 4. Establish internal AI committees
 5. Differentiate pricing structures
- **Agency Mania Solutions** introduced new AI capabilities within its EvaluationDeliver™ platform—advancing how brand advertisers assess and improve the performance of their agency relationships. The new capabilities are AI-Powered Evaluation Dashboard, AI Assistant, AI-Powered Report Exporter, and AI-Powered Insight Reports.
- Per **The ProcureCon Marketing 2025 Playbook**, 100% of procurement professionals are using data analytics to identify and mitigate risks in agency relationships to some extent. 88% agree or strongly agree that “generative AI tools are significantly transforming procurement marketing strategies, demonstrating that AI is no longer a future consideration, but a present-day force reshaping the industry.” They use AI for market research and competitive analysis (73%), data analysis and reporting (71%), customer relationship management (54%), and content creation (48%).
- **StrawberryFrog** launched two new AI-powered units: StrawberryFrog AI, which focuses on applying AI across the marketing funnel, and Inplural, an AI product innovation and transformation agency. **Raindrop** launched Raindrop Realms, which uses AI-powered digital backgrounds and scene extensions that allow it to cut production costs by nearly 60%.

The core creative skills remain unchanged: storytelling, communication, imagination, and an understanding of the humans you’re both working with and trying to reach—and the cultural context in which they live.”

—Brad Simms, CEO, Gale

GALE

- Financial institution **US Bank** partnered with specialist shop Supergood (a spin-off of Supernatural AI) to create spots using AI capabilities in two months from beginning to launch, including competitive analysis, creative brief, creative variations based on unique customer segments, and social and digital media copy. Supergood reviewed and edited the AI copy.
- The American Association of Advertising Agencies (4As), International Advertising Association, The One Club for Creativity, and others launched, in partnership with AI platform Springboards, an **online blind-taste** test to evaluate the creative capabilities of OpenAI’s ChatGPT, Anthropic’s Claude, Google’s Gemini, and Meta’s Llama, as well as Grok, Mistral, DeepSeek, and other models.
- Per Adweek, five startups use **AI agents** to automate ad ops and marketing tasks: MarkeTeam (in-house marketing teams), Olyzon (ads on connected TV platforms), ProRata (search related services), Streamr.ai (creative production and media buying for CTV ads), and Swivel (ad monetization for publishers).



- Global production and independent third-party consultancy **APR** launched a new offering, positioning itself as the “world’s first AI-native creative production advisory,” to help brands optimize marketing investment across the content supply chain. The firm will leverage its proprietary data platform ACERO™ and suite of AI-powered tools.
- **Publicis Groupe’s Digitas** introduced a new tool called NX Score (short for Networked Experience Score), which scores brands based on their connection with consumers and how they stack up against competitors. The tool, part of a larger AI platform, uses thousands of datasets (e.g., social media mentions and purchase frequency) compiled from numerous owned and public sources to deliver a report showing how a brand performs with several types of consumers of differing loyalty levels.
- Per the **Interactive Advertising Bureau** and its Digital Video Ad Spend Report, 22% of video ad creative was either built or enhanced using generative AI in 2024—a figure expected to nearly double by 2026.
- Per the white paper “**Adapt or Die: Reinventing Your Agency in the Age of AI**” by Original Minds, the AI marketing industry is set to more than double from \$47.3 billion in 2025 to \$107.5 billion by 2028. 67% of agencies say they’re “using AI,” but only 30% have integrated it into more than three core workflows.
- CPOstrategy released its **AI in Procurement Playbook Vol. 2**, which explores how new digital tools are redefining procurement’s role within the enterprise through AI. It includes practical strategies and vital solutions to empower leaders and their companies to integrate AI into operations seamlessly and intelligently.
- Per Madison Logic and The Harris Poll, 73% of **B2B marketing** decision-makers see AI-generated creativity as the future of advertising, with 85% currently investing in machine learning and AI.
- Per Orbit Media Studios, research indicates that **content marketers** who use AI take 10% less time on average to write a content marketing article (3 hours, 24 minutes vs. 3 hours, 48 minutes) than those who don’t use AI.
- Per Michael Farmer of Farmer & Company, in light of the **financial pressure of the AI phenomenon**, agencies should advise clients of the following:
 1. “We will use AI aggressively to lower our costs and replace menial jobs with AI solutions”
 2. “We would like to reinvest the savings from our AI usage into senior consulting-like brand analysts and strategists, who will carry out work, on your behalf, to figure out how to overcome brand stagnancy and restore brand growth”
 3. “We believe that we can rekindle brand growth once we understand all the factors that have inhibited growth for the past 15 years”
 4. “We expect to recommend changes in media spend, media mix, and creative scopes of work from their current configurations into something else that has a higher probability of succeeding”
 5. “We would like your support as we pivot from what has not worked to date to something that has a higher probability of working”
 6. “We would like to keep our fee levels where they have been while we reinvest AI savings into consulting-like capabilities and services”
- **Walz Tetrick Advertising** launched an AI-dedicated operation called Fuel Labs as a strategic advisor for businesses seeking to harness AI’s potential. The entity works across the agency’s creative, media, and strategy teams to integrate AI capabilities into client projects but also develop proprietary solutions for clients across retail and manufacturing sector as well as AI-enabled models and platforms.
- PepsiCo-owned **Gatorade** launched a new generative AI-powered design experience (gatorade.com/ai) that allows athletes to express their unique styles and interests through nearly endless personalization possibilities on Gatorade Squeeze Bottles in partnership with Work & Co, part of Accenture Song, using Adobe Firefly. After selecting a favorite design, anyone can purchase their one-of-a-kind Gatorade Squeeze Bottle for \$34.99.
- The Association of American Advertising Agencies (4As) released its **The State of Generative AI inside US Marketing Agencies 2025** report, based on a study conducted in partnership with Forrester, inviting agencies to change their marketing services commercial model to pay off the promise of AI. The report highlights investment levels, ROI expectations, and how agencies are leveraging technology, including implications for brand advertisers and legal and commercial barriers impacting GenAI integration.
- Per the WFA’s **in-housing AI (perspectives from the people powering in-house creativity)** report, most in-house agency teams are either experimenting with (65%) or partially implementing (71%) AI within their processes with some successes: faster content production (40%) and increased efficiency (33%). 93% plan to invest further in AI in the next 12 to 24 months. Roadblocks include ethical concerns such as authenticity and AI bias (64%), data privacy concerns (57%), and integration with existing tools and brand IP/copyright (50%).
- Per the WFA, **brands and their media agencies are using AI** essentially to enable faster reporting, followed by transforming media agency relationships, enabling more informed, strategic decision-making, and enabling increased agility and responsiveness. Improving media AOR is also of importance.
- Marketing intelligence platform startup **Alembic** raised \$145 million in its latest fundraising round (Series B) with help from growth equity firm Prysm Capital, Accenture, WndrCo, and SLW, valuing the company at \$645 million. The firm uses AI to analyze data, connecting every marketing dollar spent to revenue and eliminating blind spots and wasted budget for clients such as NVIDIA. Alembic is known for its proprietary Spiking Neural Network technology and causal algorithms as well as its prediction modeling that offers 30-60-90-days forecasts. The firm also automates marketing planning with its Alembic Intelligence Brief, revealing drivers of revenue and key KPIs across all marketing initiatives and eliminating the need for dashboards.



- Swedish-based **Stravito** launched AI Personas, an AI tool that brings together a company’s knowledge and turns it into always-on, interactive, segment-specific consumer profiles, so marketing and insights teams from clients such as Delta Air Lines, Heineken, and Pernod Ricard get specific, relevant insights they need to test, refine, and co-create ideas in real-time. AI Personas can build dynamic personas from a brand’s own research and segmentation, generate, improve, and iterate on concepts dynamically, and compare reactions across audiences to spot diverse perspectives.
- **Stagwell** launched another self-serve platform to its suite of offerings, **NewVoices.ai**, an AI agent-driven workflow management tool. The platform offers an agent studio that allows users to create, train, and manage enterprise-grade voice and chat agents via an interface that can adjust for tone, logic, and workflows for sales/ revenue, customer support, payments/operations, etc.
- **Chiefmartec** and **MartechTribe** released their **Martech for 2026** report, highlighting that the agentic era of marketing has begun. 90.3% of companies reported that they’re using AI agents (for marketers, for customers, and of customers) somewhere in their martech stack. Most popular agents include:
 1. Content production agent (68.9%)
 2. Publishing AI-optimized content such as FAQs (63.1%)
 3. Customer service chatbot agents (54.4%)
 Others (under 50%) include audience discovery/ segmentation agent, competitive analysis agent, prospecting researching agent, and social media agent.
- Per Tim Williams of **Ignition Consulting Group**, “**What should agencies do with profit realized from the reduced staffing costs realized through the use of AI?**”:
 1. Create a new line item on your P&L labeled “Product Development,” (at least 7% to 10% of your total revenues—roughly the same amount most agencies currently spend on new business)
 2. Assemble (or hire) a small team fully devoted to product development initiatives
 3. Leverage the AI tools of your choice to help you sift through, organize, and prioritize your core competencies, offerings, and intellectual capital
 4. Use these same AI tools to help you answer, “What are the types of problems we most often solve for our clients?”
 5. Identify six or seven programs (or solution sets) that you will commit to develop in the coming year
 6. Ask your product development team to organize the work in a time-boxed series of sprints designed around key milestones that will result in the development of at least three programs
 7. Launch your new programs with a test-and-learn mindset

In-house agencies

» HIGH IMPACT

- Per the ANA’s **The CMO’s Playbook for Marketing Technology**, key success metrics to strike the right balance between in-house capabilities and outsourced expertise: cost efficiency, speed to market, vendor performance, resource utilization, and return on investment. 50% of CMOs identified the staffing and training of teams to use tools as one of their top challenges, indicating a potential driver for outsourcing certain roles to overcome talent gaps.
- Restaurant chain giant and Dine Brands-owned **IHOP** moved all social and creative work in-house, replacing incumbent agencies The Brand Amp (social) and Pereira O’Dell (creative).



KPIDeliver unifies every agency-related data point into a single source of truth. Instead of fragmented tools, marketers gain a single dashboard covering rosters, finances, scopes, efficiency, staffing, and more.

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Scan this code or visit agencymania.com/drowning-in-data-starving-for-insight to check out our jointly developed white paper with A&MPLIFY by Alvarez & Marsal titled “Drowning in Data, Starving for Insight.” Leaders don’t want more dashboards; they want proof that marketing spend drives revenue and profit.



» NOTABLE

- **PepsiCo** shifted some of its in-house creative studio duties to VaynerMedia related to its portfolio of carbonated soft drinks in a move to strengthen its marketing and advertising on its digital platforms. PepsiCo's other in-house creative agency dedicated to foods, D3, is not affected.
- Per Blum Consulting Partners, **the future of a successful in-house agency requires:**
 1. Defining expertise and roles (strategic thinkers, content creators, channel specialists, data analysts)
 2. Streamlining collaboration (cross-functional workshops, shared content calendars and workflow automation, open communication channels)
 3. Investing in growth (ongoing training, networking and industry events, continued performance measurement)
- **Keurig Dr Pepper** shut down its in-house full-service creative agency, Liquid Sunshine, to favor “world-class personalized creative at scale” with external agencies. The in-house creative agency comprised 80+ employees who worked across 125+ Keurig Dr Pepper brands, handling packaging, social media, campaigns, and consumer engagement work. It was named 2024 In-house Agency of the Year by the In-house Agency Forum.
- **Newell Brands** strengthened its in-house agency to become “content machines able to take a creative strategy, extrapolate it across multiple mediums, and build out a thorough execution of the idea globally.” In-house duties include e-commerce content, packaging design work, content creation, as well as digital campaigns and influencer marketing to retailer media and packaging. The brand still hires external creative agencies for creative strategy work, and media agencies for broader media strategy, buying, and optimization.
- Among Ad Age Top 25 Ads of 2025, eight were **created in-house** (if you include embedded or hybrid in-house structures, e.g. Forge, Gap):
 1. A24: “Marty Supreme” (in-house)
 2. Prada: “Ritual Identities” (in-house)
 3. AG1: “Good Morning, Moon” (in-house)
 4. Rugiet: “Second Half Rally” (in-house)
 5. Ralph Lauren: “Oak Bluffs” (in-house)
 6. Polaroid: “The Camera for an Analog Life” (in-house)
 7. “Zohran for NYC”: Forge (classified in-house/ embedded design co-op)
 8. Gap: “Better in Denim” (marked “Gap + Invisible Dynamics,” functionally an internal-led model)

If you count only pure “brand-owned” internal creative teams, the number is six. Only two shops produced more than one campaign in the Top 25:

1. Wieden+Kennedy (Yeti: “Don’t Get Them a Yeti” and Nike: “So Win”)
2. Isle of Any (The New York Times: “It’s Your World to Understand” and ChatGPT: “Dish, Pull-Up, Road Trip”)

New agencies, capabilities, & reorganizations

» GAME CHANGING

- **Publicis Groupe** merged Leo Burnett and Publicis Worldwide to create Leo, a creative unit (aka “creative constellation”) comprising more than 15,000 employees in 90 countries, with the aim to bridge creative human craft with data and technology.
- WPP media network **GroupM** restructured the agency in a move to unify its media agencies around central teams and capabilities. The new leadership team will oversee global operations and multinational clients for Mindshare, EssenceMediacom, and Wavemaker.
- The largest independent media agency globally, **Horizon Media**, launched its full-service creative agency, One Horizon. Operating as part of Horizon Media, the agency integrates technology, data, and creativity under one roof, in a move to expand multidisciplinary work with existing clients. The agency will partner with specialty divisions such as 305 Worldwide (multicultural), HS&E (sports and experiences), First Tube (digital experiences), Blue Hour Studios (influencer marketing), Night Market (commerce agency), and Green Thread (B2B).
- Interpublic Group of Cos.’ **Weber Shandwick** launched a “creative intelligence advisory” unit, Weber Shandwick Creative Intelligence Partners, designed to help CMOs, brand marketers, and agencies evaluate risk before their creative launches to the public. The unit will handle crisis communications, corporate and public affairs, and social impact.
- **Supernatural AI** became a holding company, splitting its AI practice into a business unit called Supercharger (focused on software) and rebranding its ad agency business as another unit (focused on services), called Supergood. The firm states that 85% of its revenue comes from agency work and 15% from software.
- **Omnicom Group** announced its new organizational structure across six business groups (media, public relations, production, commerce, advertising, and diversified agency services) following its acquisition of Interpublic Group of Cos. Toward Omnicom’s costreduction target of \$750 million, the new structure eliminates three creative networks (DDB, FCB, and MullenLowe), reorganizes media operations, and integrates data and tech platforms.
- **Omnicom** restructured its various legacy media brands into a new Omnicom Media Group org structure consisting of six flagship media agency services brands: OMD, Initiative, UM, PHD, Hearts & Science, and Mediahub. The group represents \$73.5 billion in “buying power,” up from the prior \$65 billion combined media spend under its management (and an estimated 7.4% share of global ad spending).



- As part of **Omnicom's acquisition of IPG**, IPG folded MullenLowe into TBWA and Omnicom folded DDB Worldwide into TBWA. Omnicom now has only three global creative networks: TBWA (which includes Omnicom's DDB and IPG's MullenLowe), BBDO (which includes IPG's FCB), and McCann (historically part of IPG). Adam&Eve merged into TBWA in the UK, US, and German markets. The US Advertising Collective (previously known as the Omnicom Advertising Collective) will continue to house a mix of smaller Omnicom and IPG shops, including Goodby Silverstein & Partners, GSD&M, Lucky Generals, Zimmerman, Carmichael Lynch, The Martin Agency, Deutsch, Lola, Africa, and Merkle & Partners. Omnicom Media operates five global media agency brands: OMD, PHD, Hearts & Science (all prior Omnicom), Initiative, and UM (all prior IPG). Mediahub, an IPG agency primarily focused on the US, will house IPG's data broker Acxiom. Omnicom's data, identity, commerce, platform, and AI infrastructure ecosystem includes Acxiom (from IPG), Flywheel (from Omnicom), and Omni.
- » HIGH IMPACT
- Independent agency network **Worldwide Partners** added eight new agencies to boost the network's creative, experiential, retail, and Hispanic marketing capabilities while expanding its footprint. The eight firms are full-service creative commerce agency Blue Chip (Chicago), full-service financial services and luxury agency Solve (Minneapolis), Lure (Germany), data strategy, media planning and buying, and vertical expertise firm Mediassociates (Sandy Hook, Connecticut), VMG (Dallas), US Hispanic audience network Digo (New York), influencer agency Sway Group (Mills Valley, California), and digital-first agency Propel (Philippines).
 - The Publicis Groupe media-investment unit, **Publicis Media**, launched Women's Sports Connect, a new offering using agreements to buy certain types of ad inventory as well as the funding of original content. The aim is to help advertisers get positions in sports and programming centered on female athletes, as well as exclusive media opportunities and strategy to tie strategy and measurement of ad effectiveness together. Per Deloitte, women's sports are projected to reach \$1.28 billion in global revenue.
 - **Alembic Technologies** is a San Francisco-based AI-powered marketing analytics platform ingesting data across channels: web analytics, conversion metrics, social and paid media, TV, radio, podcast, user generated content, news and PR, social media, and even custom applications such as transactional data and conversion data. The firm says its dashboard makes it easier for CXOs to track marketing activity in real-time to uncover never-before-seen insights and find the insights they need to make data-driven decisions. Its Attention Marketing Economy (AME), a supply-side analysis that forms the Attention (Brand Reach, Awareness, and Equity and Demand)/Action (Interaction and Target Goals) framework, identifies winners by marketing goals. The firm recently launched its Brand Health Daily Sentiment tool.
 - Sports, music, and entertainment talent agency **Wasserman** consolidated its creative agencies to form Wasserman, a creative services group that includes Laundry Service and its influencer agency Cycle, lifestyle agency trevor//peter, and its in-house creative team, in a move to offer a full-service marketing solution while eliminating silos that divided creative teams.
 - **Dentsu** launched its Adobe GenStudio Dentsu+, combining Adobe's GenStudio suite with Dentsu's integrated services and the Mercurly data and identity platform. GenStudio Dentsu+ is an AI-powered, content supply chain platform, exclusively for Dentsu's clients to efficiently reach and engage audiences in a highly scaled and personalized manner.
 - **Google** launched a new calculator to help ad agencies track emissions from digital marketing activities such as online ads on a client-by-client basis—both on its platform and others. The calculator uses widely accepted accounting methodologies from the Greenhouse Gas Protocol and Global Media Sustainability Framework.
 - **Disney's** in-house creative agencies, Yellow Shoes and The Hive, were merged to handle all brand and experiences campaigns across Disney consumer touchpoints. The move is expected to drive alignment, creativity, and synergy between the two creative marketing ecosystems. Yellow Shoes handles Disney's parks, resorts, cruise ships, and other experiences. The Hive handles concepting, producing, and developing creative marketing across company brands, Walt Disney Studio banners, and Disney+.
 - In light of poor Q1 results, **WPP's GroupM** began a restructuring to unify its operations, "moving to a single operating model" for its 40,000 employees worldwide (across its agencies Mindshare, Wavemaker, EssenceMediacom, and T&Pm). The aim is to reduce overlap (and therefore headcount), simplify how clients engage with the agency, and house dedicated client teams so GroupM agencies no longer operate as distinct business units.
 - **WPP** restructured by moving Grey to report to the Ogilvy network (instead of AKQA as previously set up). Other agencies within Ogilvy's network include David, INGO, and New Commercial Arts. Grey will continue to operate independently and as a standalone brand.
 - **Omnicom's BBDO** restructured and merged its Los Angeles, San Francisco, and Dallas offices under the name West BBDO and a single P&L and leadership. AAA and Genentech hired West BBDO as creative AOR this year as clients seem to seek more integrated teams across geographies.
 - **Omnicom Media Group** consolidated its influencer marketing capabilities globally under the Creo brand, a full-service creator and influencer marketing agency launched in 2022. Creo will access data from the holding company's operating system Omni.



- A new London-based agency called **Studio.One** was launched by AKQA founder and industry vet Ajaz Ahmed, challenging traditional holding company agencies by aiming to provide advertisers what it describes as a more agile, modern solution (“The future doesn’t need another version. It needs a new vision”).
- A new AI-centric full-service agency called **Cosmic Charlie** launched with the aim to be nimble and future-focused in delivering both strategic creativity and production at scale, as an alternative to traditional agency models.
- The new AI-first design and technology company **10,000 Robots (10kR)** launched by former YML veterans, aims at combining humans and machines to work together to create intelligent digital experiences. The firm prioritizes senior talent, leaving AI agents to do the work typically handled by junior talent. The firm launched its AI agents acting as a creative director named Zo but also created AI personas to emulate individual client personas, anticipating their feedback, reactions, and more. The firm leverages several AI tools such as Lovable, Sora, Runway, Make.com, Langflow, and Zapier.
- The technology transformation, commerce, customer experience, and consulting capabilities of WPP’s VML were brought together under **VML Enterprise Solutions**, which comprises 10,000+ experts across more than 40 global offices within the VML global network. Key clients include Ford, Coca-Cola, Google, IKEA, Sainsbury’s, Sherwin-Williams, T-Mobile, and United Rentals.
- **WPP** led the strategic scaling of its Global Delivery Centers in India, including media, content, commerce, technology consulting, data, and CRM, standardizing processes and leveraging AI across workflows. A new center of excellence for VFX workstreams was also created.
- **IPG’s McCann Worldgroup** reorganized its agency into four brands—creative agency McCann, production company Craft, brand consultancy Futurebrand, and precision marketing agency MRM—to simplify how clients interact with the firm. McCann Worldgroup reports a 50-50 split between pitching projects for existing clients and for AOR type work, indicating that the agency is restructuring to move increasingly more to project-based work.

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- **WPP** restructured its GroupM offering through the name WPP Media in a move to simplify operations, improve financial performance, and integrate the media unit's offering with WPP's umbrella marketing/technology platform, WPP Open. With the change, WPP clients can combine media, data, production, and advanced AI-powered capabilities in ways that enable personalization of marketing messages at scale.
 - **Omnicom** combined its top data and tech assets (including Omni, OmniAI, Artbot, and Flywheel Commerce Cloud) into a unified platform called Omni. IPG's performance marketing shop Kinesso and data broker Acxiom are expected to be incorporated post-acquisition.
 - Advantage United Commerce and Amp Agency merged to launch **AMP (Advantage Marketing Partners)** in a move to offer full-scale services to its clients (BF Goodrich, Ferrero & Bayer, Starbucks, Southwest Airlines, and others). The firm offers services including strategy and intelligence; creative and content; retail and commerce; media and measurement; digital and social; and ad activation and amplification.
 - LA-based marketing group **Acceleration Community of Companies** launched a synthetic audience platform for testing creative and messaging, simulating audience responses in seconds and synthesizing census data, behavioral patterns, ethnographic research, and "proprietary netnographic signals" drawn from online audience behavior.
 - Madrid-based **Globant** combined its marketing and advertising disciplines under Gut Network, aligning AI, digital marketing, digital consumer experience, social, content, media, martech, and analytics. Combined clients include AB InBev, Mercado Libre, P&G, Kraft Heinz, Verizon, FIFA, F1, Electronic Arts, and Okta. The firm is opening two new offices in Bogotá and Copenhagen to serve clients such as Biogen and Alfa Sigma.
 - Dallas-based independent **PMG** launched a new commerce and retail "data connection" to its homegrown Alli operating system. The expansion of Alli integrates Velocity, a proprietary retail and media intelligence platform originally developed by Momentum Commerce. It allows the tracking of more than 37 million products and 880,000 brands across Amazon, Walmart, Target, Instacart, and other retail platforms. Momentum Commerce is now part of PMG.
- » **NOTABLE**
- **Amazon Ads** launched a new product called Amazon Retail Ad Service, allowing retailers to use Amazon's tools such as ad technology and machine learning models built on AWS to sell product ads appearing on their e-commerce sites. The service competes against retail ad tech firm Criteo and Publicis Groupe-owned Epsilon, among others.
 - Ad agency **A&G** launched a standalone, tech-focused, data-driven CRM agency, CeCo Digital, to help brands retain and grow customers. The new firm's approach unites communication, CX, and loyalty capabilities to design and launch digital products like customer portals.
 - Marketing agency **Fastlane** launched a specialist shop, FitVisible, to focus on the fitness, health, and wellness categories. The agency is designed to help startup and early-stage players. The wellness economy reached a record \$6.3 trillion at the end of 2023, according to the Global Wellness Institute.
 - Vancouver, BC-based **Rethink** launched a full-service public relations offering as an extension to its advertising business. The agency has already been recognized for PR work, including a Gold in Strategy's PR Agency of the Year program and a PR Campaign of the Year for Molson Coors' "See My Name."
 - Creative agency **Mischief @ No Fixed Address** expanded its offering to include media planning and buying (comms planning, strategy, buying, analytics, and measurement) to deliver a more integrated solution to clients. Standalone media clients include Supercell and Duolingo.
 - **Maximon.ai (maximon.ai)** was launched by former HP CMO Vikrant Batra. Maximon states that it builds AI solutions that deliver results—not advice—and that the firm is built by practitioners, not theorists. It helps companies transform their marketing and communication functions into AI-first organizations.
 - A new brand experience agency, **Studio Secret Cinema**, a part of Secret Cinema, a division of TodayTix Group, launched with a focus on "immersive, captivating experiences" and "maximizing entertainment brand events and upping experiential marketing to cement connections with audiences." Clients include Activision Blizzard and Havas Play.
 - A new consultancy called **Significant** was launched by former Mother LA's leaders with the goal to weave strategy and creativity together to address business challenges beyond advertising.
 - New indie agency **Super Nice** launched in Atlanta and Los Angeles to help brands identify new ways for brands to stand out and drive culture with next-level content and creations. The agency's motto: "Be nice. Be bold. Be better."
 - Kansas City, Missouri-based full-service independent agency **BarkleyOKRP** launched MissionOne Media, an independent media offering under the BarkleyOKRP umbrella. The division will provide full-funnel media planning and buying services, as well as CRM, data, analytics, retail media, and digital experiences.
 - New independent agency **House of Rabbits** was launched by McCann and Saatchi leaders to offer a creative alternative to brands looking for "quick, clever, curious, and collaborative" talent.
 - **X** launched its AI-generated platform leveraging its Grok AI assistant, similar to text and image-generating tools, like OpenAI's ChatGPT for text and DALL-E for imagery, to auto-generate posts/ads by analyzing a website's homepage. The AI tool will also produce a call-to-action headline in addition to the ad copy and imagery.



- Indie ad agency **Madwell** closed doors April 30 amid financial difficulties and rumors of fraud and other financial improprieties. Earlier in the month, Verizon ended its relationship with the agency. Madwell was believed to have experienced financial issues due to a multi-year financial fraud by former leadership, with employees reporting delayed paychecks, and missing vendor payments as a result. Ad Age revoked Madwell's Comeback Agency of the Year title.
- Raleigh, North Carolina-based **Baldwin&** is merging with Portland, Oregon-based North, enabling Baldwin& to add a channel strategy discipline to its offering. Clients now include Volvo Trucks, Long John Silver's, Pivotal, Hydro Flask, and Columbia Sportswear.
- A new agency called **International Waters** launched to serve midsize clients with revenue between \$20 million and \$1 billion. Headquartered in Bucharest, Romania, with US operations in Chicago, the agency plans to also operate in the Middle East and European markets.
- Ad agency **BarkleyOKRP** launched a new media agency called MissionOne Media. MissionOne completed its first acquisition, an AI-driven SEO specialist called Growth Skills, which leverages AI-powered tools and platforms to build interactive content to drive leads, donations, and sales.
- A new agency called **ImaginaryFriend** launched to complement in-house marketing teams. The shop started by adam&eveDDB veterans acts as an "unseen partner" to brands, such as luxury resort Fontainebleau Las Vegas, helping pair them with the right senior executives for a given assignment.
- The sustainability-focused creative shop **AKQA Bloom**, founded in 2022, is being integrated into AKQA Americas as part of a global company restructuring that organized the agency under three regional P&Ls: Americas, EMEA, and APAC. Sustainability and climate commitments among clients and agencies are on the decline.
- **Stagwell's 72andSunny** expanded its European operations by opening Strategy Studio, out of its 72andSunny's Amsterdam office, supporting clients such as e.l.f. cosmetics, Indeed, and TikTok. The studio supports clients looking to build brand foundations by creating partnership strategies and designing brand worlds.
- **BarkleyOKRP** launched a new standalone media agency MissionOne Media to "scale with soul," handling all elements of a full-service media agency but with a focus on staying closely linked to the creative side of the business. MissionOne Media was built based on performance-driven agency Adlucent, a recent acquisition.
- The consultancy **Harmonium** launched to support both marketers and agencies, led by Hasan Ramusevic, the former global CEO of Interpublic Group of Cos.' Mediahub and a BMW marketing veteran. The consultancy helps agencies with M&A, contract strategy, conflict resolution, and general financial operations. Harmonium handles agency reviews for brands and also evaluates and strengthens internal marketing operations.
- Creative agency **Atomic London** launched its new entertainment arm, Atomic Studios, in a move to embed brands in culture by creating long-form brand content such as advertising, social, and TV, and help brands develop stories.
- **TrinityP3** launched BetterPitch, a new framework designed to make marketing and procurement agency review processes simpler, faster, and more effective. The framework promotes 5Fs: Fast, Fit, Focused, Flexible, and Fun.
- **Stagwell-owned media agency Assembly** launched Assembly Control, a tool supported by Assembly hubs in New York, London, Singapore, and Dubai, enabling advertisers to ensure brand safety ad suitability and reduce risks across publishers, apps, and environments.
- **Havas Media Network** launched its Health Equity Marketplace in partnership with healthcare adtech firm DeepIntent, a program designed to convey healthcare related marketing messages from brands to underserved communities in North America, including minority groups, rural populations, and underinsured patients.
- **Stagwell** consolidated and rebranded its production operations—Anomaly Content & Entertainment and Wolfgang Studios—under a new entity called Unreasonable Studios, "powered by" Stagwell's digital language service platform, Locaria. The aim is to scale international campaigns with multilingual content and other localization services. Unreasonable Studios, with 200+ employees and 1,200+ contractors in 60 countries, will provide original and branded entertainment, live action commercial work, editorial photography, digital and social media, creator content, post-production, motion, and design capabilities, and adaptation and localization technologies and services.
- **Stagwell** launched Stagwell Media Platform using its tech stack and agency AI planning systems, tech partnerships and scale, to model, forecast, and optimize efficiency and outcomes across media, creative, and digital transformation services for clients.
- UK-based sports marketing agency **Dark Horses** folded within Omnicom TBWA\London to deepen the agency's expertise in sports, culture, and entertainment.
- **Mischief** launched in-house production studio The Candy Factory (inspired by Willy Wonka) to quickly create content using AI and traditional methods. The studio is staffed with AI creators offering services such as still photography, live action, visual effects, post-production, editing, VFX, computer graphics, and AI-assisted content.
- A new design house, **Shophouse**, launched with a mission to deliver "strategic brand transformation, innovative digital experiences, dynamic content systems and groundbreaking retail solutions for the best brands in the world." The firm is built on a remote freelance model, assembling experienced creatives, specialists, and strategists best suited for each project. Clients include Coach and Kate Spade, and Procter & Gamble's premium skin care brand SK-II.



- A new London-based global innovation agency, **Plus1 Assembly**, launched to offer clients a diverse offering: Halo, a live cultural intelligence system that tracks culture on social, then instructs brands how to respond; Layfe, an AI consultancy that Plus1 acquired; and Rise, an investment arm. Clients include Rezzil, The Stomping Ground, and Codeblaze.
- Omnicom launched **Omnicom Oceania** in a move to align all of Omnicom's practice areas in Australia and New Zealand, including market-leading media and creative agencies, PR, performance marketing, and production under a unified structure.
- **Cheil North America** launched a full-service media agency called Attention Arc (the fifth agency in Cheil's North America portfolio) by merging creative agency McKinney's media buying arm with direct marketing agency Lockard & Wechsler Direct, in a move to scale up media buys (currently \$500 million in billings). The new agency will handle all media buying across the network's agencies, a role previously played by McKinney Media.
- A new full-service agency called **Project3** launched, aiming to redefine brand-making with a focus on storytelling and to expand creative resources for businesses. The agency will handle creative direction, content creation, production services, and brand design and strategy.
- Digital marketing performance agency Labelium rebranded as **Cosmo5**. The global marketing agency, which offers media, creative, commerce, data, and technology services, has 30 offices in 18 countries (HQ in Paris) with a team of 1,300 overseeing more than \$2 billion in global media spend for clients such as Ancestry, L'Oréal, LVMH, LG, Micron, LEGO, Meta, Warner Bros, and Zadig & Voltaire.
- Nina Chandé, formerly of Unilever, launched a future-ready business consulting and services firm called **Like No Other** which has a core mission to help brands, agencies, and tech vendors unlock procurement potential, protect margins, and accelerate growth. The offering is based on four core propositions:
 1. Procurement Accelerator 4.0: Procurement training to build commercial, negotiation, and AI confidence
 2. Negotiation Desk: On-call support for live deals, pricing, and procurement strategy
 3. AI Sprint: Enabling AI solutions to transform and scale commercial models and partnerships
 4. Procurement Maturity Assessment: Unlocking procurement's role in growth and innovation
- Integrated-marketing firm **The Abbi Agency** launched an influencer-marketing service unit. The Reno, Nevada-based agency, which also has offices in Las Vegas and Helena, Montana, works for "world-class travel destinations, national health initiatives and Fortune 500 heavyweights" (Visit Carmel, Carnival Cruise Line, Aramark Destinations, the Yosemite Conservancy, Google, Tesla, Travel Nevada). The agency was Midsize Agency of the Year by Bulldog PR and Advertising Agency of the Year by the AAF Western Region.

- F1 driver Charles Leclerc launched a creative studio called **Sidequest**, bridging sports and culture. The firm, with offices in Monaco and Amsterdam, combines film, photography, design, and music. Clients include Chivas Regal, APM Monaco, Celsius, Eight Sleep, and LEC.
- Brand agency DesignStudio rebranded as **Further** a year after joining forces with creative studio Pixel Artworks and motion design specialists Analog. The firm serves clients such as Airbnb, Riot Games, EA Sports, and Eurostar from its offices in New York, London, and Dubai.
- Stagwell creative agency network 72andSunny launched the **72andSunny Creative Collective**, combining 72andSunny, Forsman & Bodenfors, Canada-based Bruce Mau Design, and California-based production company Hecho Studios under one creative banner to expand its global footprint and provide more scale and flexibility to clients. Forsman & Bodenfors' Toronto and Singapore offices rebranded as 72andSunny as part of the move.

“ Excerpt from the new article, *Benchmarking, Reinvented*

At its best, benchmarking is about fueling transparency, strengthening partnerships, and ensuring both sides are aligned to deliver their best.”

Bruno Galpois
Co-Founder & Principal
Agency Mania Solutions

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Scan this code or visit agencymania.com/benchmarking-reinvented to check out Bruno Galpois's article on understanding benchmarking to deliver the best work within a partnership.



- A new creative agency called **52** launched with hubs in Miami and Buenos Aires, started by a former Republica Havas executive. Clients include technology, travel, and home appliances brands.
- Nashville-based award-winning independent Bohan agency rebranded as **Artists&Outlaws** to emphasize the creative tension between business and artistry (“When you dare to disrupt, you need the heart of an artist and the spirit of an outlaw”). The roster includes healthcare, travel, restaurants, and entertainment clients. The firm recently launched Fresh Consumables, its content production studio.
- Three former Cashmere executives launched **Currency Advisory Group**, an LA-based consulting firm that applies cultural expertise for C-suites, brands, agencies, and private equity firms to help grow their businesses. Their methodology, Culture Capital Engineering™, identifies cultural misalignment, uncovers untapped cultural equity, and converts both into competitive advantage.
- Per **McKinsey & Company**, five takeaways to rewire martech “from cost center to growth engine”:
 1. Treat martech spend like media for ROI accountability
 2. Expose the 10x tool sprawl complicating your martech stack
 3. Unlock conversions by up to 40% with AI-driven journeys
 4. Close the capability gap with people, not platforms
 5. Elevate martech to the C-suite agenda
- A venture capital firm launched a new agency, **Spacecadet Studio**, focused on emerging tech startups in areas such as AI, aerospace, blockchain, energy, robotics, and biotechnology. Capabilities include strategy (brand strategy, brand architecture, brand planning), design (visual identity, verbal identity, user experience), and marketing (video, social, viral engineering). Clients include Cytronic, Autograph, Sperm Racing, Lir Therapeutics, and Gold Gang.
- The Brandtech Group and **Adobe** introduced a partnership to integrate the industry-leading and commercially safe Adobe Firefly Services into Brandtech’s established generative AI marketing platform Pencil Pro, creating efficiencies for brands’ marketing campaigns. Brandtech clients using Pencil Pro will be able to interoperate between Adobe Photoshop, Adobe After Effects, and generative AI workflows, allowing them to create insights, generate creative content at massive scale, predict performance and quality scoring, and more.
- **WPP** built a strategic partnership with Stability AI combined with a minority investment in the company, resulting in embedding generative content production AI tools into WPP’s technology hub, Open, to produce video, audio, and 3D objects. WPP is also integrating Google’s AI video tool, Veo 2, in Open.
- **WPP** appointed management consulting firm McKinsey to advise on its much-anticipated strategy review following disappointing financial results and declining market share. McKinsey is expected to support WPP in simplifying and better integrating its offerings, using AI and building enterprise and technology solutions, building a high-performance culture, and improving finances through “operational efficiency and a disciplined approach to capital allocation.
- **Stagwell** formed a strategic partnership with the AI agentic company Gradiant, combining Stagwell’s design, creative, and AI expertise with Gradiant’s agentic execution engine to help brands connect their marketing workflows more efficiently and deliver personalized experiences across channels using AI agents. Gradiant clients include AWS, Adobe, and Dentsu’s Merkle.
- **Vivaldi Group** entered into a strategic collaboration with full-service professional services firm **Andersen Consulting**. With operations in 45 countries and more than 20,000 professionals, Andersen Consulting will collaborate with Vivaldi Group to strengthen its integrated and scalable solutions and combine scale and infrastructure with expertise across strategy, brand, and innovation.

Partnerships & collaboration

» GAME CHANGING

- **WPP and Google** announced a five-year expansion of their partnership, which features a \$400 million spending commitment from the holding company for Google technologies, including new, bespoke AI solutions built with Gemini; Google’s suite of AI models; rapid, bespoke AI model development; secure, privacy-first data collaboration; video and image production enhancements; integration of Google’s cutting-edge AI directly into WPP Open; and enhanced client service by integrating Google’s AI into WPP workflows.

» HIGH IMPACT

- **Omnicom Media Group (OMG)** was named a “Leader” among 12 global media management services providers in a new analysis from leading research and advisory firm Forrester. It’s based on 22 criteria. The analysis referenced OMG’s ability to carry audience intelligence through media planning, buying, and activation—and into scaled, near-real-time creative campaigns.

» NOTABLE

- **Bose** reported working with a company called Automated Creative in England that produces 5,000+ pieces of content a month (e.g., stills, video, product copy, search copy). The output provides different springboards for thought, which humans then plus-up.
- Per Venice, California-based Cartwright, **four ways agencies can become valued partners**:
 1. Evolve pricing models (instead of using billable hour methodologies)
 2. Innovate the service offerings (with specialty skills)
 3. Invest in own brand
 4. Rethink talent equation

Research & organizing for success

» HIGH IMPACT

- Per **CMO Barometer** (from the University of St. Gallen and Serviceplan Group), 48% of CMOs believe AI and marketing automation will be the most important topic to consider in 2025, followed by digital transformation of marketing and tools (9%). 81% want to prioritize the use of AI in marketing processes. 37% anticipate an increase in their marketing budgets, with 7% expecting an increase of more than 10%. CMOs want creativity and out-of-the box thinking from their agencies (71%), followed by innovation.
 - Per **Dentsu's CMO Navigator report**, the vast majority of global CMOs report that media is being elevated into a very important (68%), if not critical (20%), driver for the growth of their business.
 - Per search consultant Setup, only 40% of advertisers **planned to switch agencies** in 2024 compared with 55% in 2023, a 15% decrease YOY and close to the 2022 level (38%). Though fewer clients are switching agencies, 68% said they planned to review their agency partners by the end of 2024. 55% of advertisers prefer specialist agencies over generalists. 44% reported bringing more marketing functions in-house. 80% were leveraging AI primarily for content creation, operational efficiency, personalization, and research.
 - Per Campaign US, the **power of procurement in agency pitches** is growing (+26.9%), but mostly the same as a year ago (65.4%): The role of procurement in agency selection “remains crucial as cost-cutting becomes a greater focus and clients take more searches internally.”
 - The **World Federation of Advertisers** published its Global Content Production 2025 in partnership with Claire Randall Consulting, identifying the most common models (centralized, fit-for-purpose technology, etc.) and recent trends in production, such as AI in animatics, translation, adaptation, video/image editing, transcription, and post-production. Production spend represents an average of 19% of total marketing budgets compared to 24% pre-pandemic.
 - The **ANA** released its “CMO's Playbook for Marketing Technology” to help companies master the martech stack. The playbook offers strategies and insights (activation, identity, content, personalization, intelligence) to build a high-performing marketing technology operation. 57% of CMOs view recruiting and retaining a high-performing marketing technology and operations team as moderately to extremely important.
 - Per a study by **Advertiser Perceptions**, and commissioned by the Association of National Advertisers and 4As, a typical agency review takes two to three months and costs a combined \$1 million for both marketers and agencies.
 - Per the **Ad Age Brand Report 2025**, the world's top 50 advertisers increased 2024 spending by 6.6% to \$291 billion. The top 50 US advertisers boosted 2024 ad spending 7% to \$136 billion. Median ad spending growth—the midpoint growth rate—for the top 50 US advertisers was 5.4% last year. Amazon remained the biggest advertiser, both in the US and globally, for the fourth consecutive year, with \$21.4 billion worldwide on advertising and promotion in 2024. Two China-focused internet-centric brands—Alibaba Group Holding and PDD Holdings—ranked among the world's top 5 ad spenders. The US is home base for a majority of the top US and global advertisers, with 39 companies out of the top 50 US advertisers headquartered in America.
 - The World Federation of Advertisers released its **Advancing Marketing Procurement** report showing that a deeper collaboration with marketing procurement can be a quiet competitive advantage for CMOs—and a powerful ally, from sourcing to resourcing and from tactical involvement to best-in-class collaboration. Yet 26% of procurement leaders say they don't have enough resources, and 17% say they are too focused on cost-saving. The report also indicates that procurement is also experimenting with AI to automate lower-value procurement tasks, so teams can focus on what really matters.
 - Per **COMvergence**, there were 2,890 media account moves and retentions in 49 countries involving 1,700 advertisers and totaling \$26.2 billion in the first three quarters of 2025. Independent agencies captured \$3.6 billion (13% of total spend reviewed, with Horizon Media leading indie shops with key wins (Spectrum's \$800 million and Peloton's \$225 million accounts). Publicis Media was the leader among the major holding groups in new business activity in 2025, generating \$7.7 billion in net new client billings (or one-third of all media spent shifting) in the first nine months of the year alone, including Coca-Cola in North America, Aldi, Barilla, Campari, Friesland Campina, Dropbox, Goodyear, LinkedIn, Mars, Paramount, PayPal, and Santander. IPG Mediabrands (now retired as a brand as part of the Omnicom-IPG merger) ranked second with \$2.5 billion in net new business and Dentsu third. WPP Media was the only one of the Big 6 groups to lose ground, losing \$5.4 billion in media spend to other agencies.
 - The WFA released its **The Future of the Media Organization** study, developed in partnership with mediasense. Key findings:
 1. Media must be rooted in growth
 2. Integration may be the next competitive advantage
 3. Consider how you define the strategy; consider rethinking the global-local balance
 4. Capabilities may matter more than headcount
- Only 13% of respondents say their current agency model fully aligns with their future requirements. A majority (60%) believe the model is right in principle but requires improvement, while nearly 1 in 5 (17%) consider it unfit for purpose. 77% of brands agree that improving this integration should be a focus. However, there is much less appetite for formal structural consolidation—only 25% support merging media and creative within a single holding company, with more than half (51%) actively disagreeing.





- The world’s leading marketing data and analytics firm, **Kantar**, released its **Connected Data, Intelligent Decisions: The GenAI Playbook for Marketers**. Key recommendations:
 1. Data audit (find the signal)
 2. Ingestion (reduce friction)
 3. Enrichment (create truth)
 4. Harmonization (make it comparable)
 5. Democratization (put insight in the flow)
- **Flock** released its 2025 Marketing Procurement white paper titled **“Marketing Procurement Reloaded: Growth in the Age of AI,”** revealing how leading procurement teams are redefining their role to drive growth, efficiency, and innovation in an AI-powered marketing landscape.

» NOTABLE

- Per Gartner, 27% of CMOs remain reluctant to adopt generative AI, believing that their investments have yet to pay off. 47% are seeing a large benefit for tasks such as campaign evaluation and reporting. 84% of high performers are leveraging generative AI for creative development, while more than half (52%) are putting it toward strategy development. Per **eMarketer**, 54% of marketers feel overwhelmed by the prospect of implementing AI into their workflows.
- The WFA published new research on influencer marketing (a fast-growing investment area for most brands) and a guide called “Global Guidance on Influencer Marketing” with topics such as disclosure and transparency, content accuracy, compliance with local laws, best practices, and ethical considerations. The use of influencer agencies has risen to nearly 74% when it comes to identifying influencers, up 20% since 2019. 66% have a policy in place on working with influencers, but 26% do not. 70% are signing contracts with influencers.

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10 Hard Truths Every CMO Must Confront to Lead Fearlessly

The rules of engagement are being rewritten, and transforming what partnership truly means.

Scan here to read:

Scan the code or visit agencymania.com/10-hard-truths-every-cmo-must-confront-to-lead-fearlessly to check out our article “10 Hard Truths Every CMO Must Confront to Lead Fearlessly,” a candid look at the choices, challenges, and convictions that define modern marketing leadership in a new partnership era.



- Per R3 (part of mediasense), **how to measure generative AI impact** and key variables to consider when tracking time:
 1. Baseline efficiency signal (if hours to complete a task drop consistently, it could suggest generative AI is streamlining that task).
 2. Cost-saving proxy (reducing labor hours can reflect savings or reallocation of resources).
 3. Operational visibility (helpful when combined with time-tracking or project management tools).

Key variables to consider when tracking output:

 1. Speed to market and volume (AI may reduce time per task, but you're producing 3x more. So overall hours may stay the same but output increases).
 2. Shifts in work (time savings may be reallocated to higher-value or more creative tasks, not necessarily "cut").
 3. Quality and effectiveness (AI might reduce hours but deliver worse outcomes or better ones; you need to know which).
- Per the **2025 State of Marketing AI Report**, 55% of brands say their company doesn't have policies guiding the use of AI, 51% don't have an AI ethics policy or responsible AI principles, and 59% don't have AI councils charged with developing policies and practices. 46% say they're running initial AI projects. 68% said they have received no AI training from their companies, one of the biggest hurdles to internal adoption.
- Per **Forrester**, by 2026 the agency marketplace will operate on three dimensions:
 1. Power: Media buying concentrates among fewer, larger players
 2. Precision: Media activation shifts from manual to agentic planning and buying
 3. Production: Audience intelligence drives asset creation and production
- Per P&G's Signal360, **four ways to better collaborate with AI**:
 1. AI requires a new kind of literacy
 2. Harness AI to increase productivity
 3. Invite AI to brainstorm
 4. Check AI's work as you would with any collaborators
- Per the Association of National Advertisers and the American Association of Advertising Agencies (4As), **the average client-agency relationship lasts seven years**, more than double the 3.2-year average reported in 2016. Full-service agencies average 7.3 years and media agencies, 3.7. Independent agencies report longer AOR tenures (7.3 years) than holding company agencies (5.8). Clients without mandatory review periods (60%) tend to have longer relationships (8.1 years) than those with frequent reviews (3.8 years).
- The **WFA** launched a new guide to global media agency contracts to help brands manage these critical relationships better. The guide adapted the latest ISBA and ANA contract templates for global use, drawing on insights from the latest updates to both frameworks, including new clauses and current hot topics such as generative AI in agency services, doing business in China, transparency, and differences between "principal" and "agent" markets.
- Per **Steven Panariello**, CEO of BBH USA, agencies can deliver work at the speed of culture in eight ways:
 1. Close the gap between ideation and execution
 2. Leverage technology as an accelerator
 3. Break down silos
 4. Build a foundation of data and measurement
 5. Foster a culture of learning and resilience
 6. Reimagine client relationships
 7. Establish forums for rapid response
 8. Embrace radical honesty

Training & new ways of working

» NOTABLE

- Per **The CMO's Playbook for Marketing Technology** from the Association of National Advertisers, key success metrics to build and lead high-performance teams who deliver on the promise of marketing technology: training rate, time to competency, recruiting success, retention rates, collaboration impact, marketing tech ROI.
- Brands are experimenting with creative ways to **search for and find new agency partners**. Per Ad Age, Snack brand Feastables searched for a creative agency by simply posting on LinkedIn, skipping the traditional pitch process, and stating that the brand is "not running an RFP." It asked agencies to message the company directly. The post generated 200 messages from agencies in less than one week. Heineken did a similar campaign in the UK, receiving over 1,000 messages.
- Per **The Hatch Agency**, top questions to ask about **how to build the right approach to talent management and in-housing vs. external agencies**:
 1. What kind of talent does this challenge require?
 2. Are you solving a capability gap or a capacity gap?
 3. Will this talent need to live within the brand long-term?
 4. Are you investing in talent that scales with you?
 5. Can you blend for the best of both?
- Per **ECI Media Management**, top 10 considerations for a media agency pitch:

| | |
|------------------------------------------|---------------------------------------------------------------------------------------------|
| 1. What's your desired outcome? | 7. Are you well positioned to truly understand the potential value of the bids you receive? |
| 2. How will you run the pitch? | 8. Have all bases been covered? |
| 3. What is the baseline? | 9. Are there regular opportunities to assess the relationship? |
| 4. What are the dealbreakers? | 10. Is your contract framework up to date/relevant? |
| 5. What will the agencies present? | |
| 6. Are you comparing apples with apples? | |



- Per the Association of National Advertisers, **client-agency tenure** doubled due to clients “seeking long-term strategic partners which can provide integrated solutions, navigate complex marketing challenges and drive sustainable business growth.”
- Per the ANA, a recent **study about agency models** shows that most brand advertisers (46%) prefer a roster of multiple best-in-class agencies, followed far behind by in-house agency (16%), free agency (14%), and integrated agency team (11%). The least popular options—holding company models with sister and custom agencies (2% and 1%, respectively)—speak to the increasing trend of clients hiring agencies on a project basis rather than as agency of record. 40% expect their agency roster sizes to stay as is within the next 12 months, compared to 34% that expect them to shrink, and 26% that expect their rosters to grow. When selecting an agency partner, 98% consider the agency’s creative execution as the most important attribute, followed by cost-value and strategic “big idea.” The least-valued attributes are geographic proximity, previous/existing relationships, unique agency philosophy/process, and agency reputation (awards, press coverage).
- Per mediasense/Ad Age, a **standard pitch/review process** takes 17 weeks (way too long!) and includes the following:
 1. Initiate process and develop credentials request/RFI (Weeks 1-2)
 2. Release RFI and agencies (Weeks 3-5)
 3. Analyze responses (Week 6)
 4. Report and alignment (Week 7)
 5. Develop assignment (Weeks 3-6)
 6. Develop fee templates, MSA guidelines (Weeks 4-6)
 7. Release strategic assignment (Week 8)
 8. Agency response time (Weeks 9-13)
 9. Q&A sessions with agencies (Week 10)
 10. Chemistry/strategic “tissue” sessions and fees due at agencies’ locations (Weeks 11-12)
 11. Final sessions at client location (Week 15)
 12. Analyze responses (Week 14)
 13. Analyze commercial proposal (Weeks 12-14)
 14. Finalist negotiation (Week 15)
 15. Top-to-top meetings (Week 15)
 16. Appoint agency (Week 16)
 17. Begin transition (Week 17)





Noteworthy quotes

- » “Transformation doesn’t happen by accident though—it requires intention, investment, and a model built to support it. This won’t happen if we trap it inside outdated economic models.”
—Mollie Rosen, President, Member Experience, **4As**
- » “The good news is AI is not going to kill advertising. The bad news is AI is not going to save advertising. We’ve got to save ourselves, by believing in what’s always made this industry special: human creativity.” —Tor Myhren, VP Marketing Communications, **Apple**
- » “It’s really critical when you’re building an in-house studio to establish the swim lanes, and to make sure that the studio has a very clear place. Because if they’re starting to compete with the agency, you’re going to run into problems.” —Kerry Kielb, Director Vendor and Agency Management, **AT&T**
- » “If more clients embraced a creds and chemistry review, they would see it creates a more equitable engagement partnership with brands and agency partners.” —Jonathan Schoenberg, Executive Creative Director, **TDA Boulder**
- » “You’re one idea away from changing the world.” —Judy John, Global Chief Creative Officer, **Edelman**
- » “Stop talking about what AI makes cheaper. Start showcasing what AI makes possible. Focus on outcomes that were previously unattainable.” —Matt Weiss, Founder, **SoulPurposeAdvisory**
- » “The old model—where agencies focused on designing ads—is disappearing. The new model? Designing AI-powered experiences that make brands tangible, interactive and indispensable.”
—Yann Caloghris, Executive Creative Director, **Left Field Labs**
- » “Most leaders are stuck on AI as a productivity tool—the real value is still beyond their sight. Some can’t even imagine its true power, and by the time they do, it may be too late for their business.”
—Anne Olderog, Senior Partner, **Vivaldi**
- » “The AI era isn’t about joining the race, it’s about rewriting the rules of competition.” —Tracy Huser, Partner, **Vivaldi**
- » “The future CMO must embody a renaissance ideal—equal parts analyst, artist, and strategist. The path forward is about finding the sweet spot where data and creativity amplify each other.”
—Christine Alemany, Fractional Chief Growth Officer, **Most Loved Workplaces®**
- » “AI is helping brands create more personalized, interactive, and engaging content.” —Stacy Taffet, SVP Marketing, **PepsiCo Beverages North America**
- » “AI will be the key to unlocking customization at scale.”
—Abbey Klaassen, Global Brand President, **Dentsu Creative**, and CEO, **Dentsu Creative US**

- » “Artificial Intelligence is more than a tool for fueling automation, productivity, and efficiency. It’s a powerful mechanism and force multiplier to unlock value creation through the entire marketing supply chain.” —Bruno Gralpois, Co-Founder and Principal, **Agency Mania Solutions**
- » “We’re at this unique intersection of ad tech, content creation, and marketing technology, which gives us a real perspective on how AI touches every part of the ecosystem.” —Ariba Jahan, Head of Transformation, North America, **Anomaly**
- » “When done right, in-house agencies can evolve into the marketing powerhouses of tomorrow.” —Andrea B. Ruskin, Partner and Co-Founder, **Blum Consulting Partners**
- » “The Agency Model is Broken. Here’s How We Fix It. For years, the big holding companies have thrived on bureaucracy, inflated costs, and layers of inefficiency. But today, brands want more. They need agility. They need world-class talent. They need results and not red tape.” —Ivan Fernandes, Founder, **Digital Business Partners**
- » “Agencies are facing an unprecedented challenge—to innovate at the speed of culture.” —Steven Panariello, CEO, **BBH USA**
- » “We’re not just competing with other companies now. We’re competing with machines. So [we must] remind ourselves and our clients of the value of the upstream things that we do.”
—Daryl Lee, CEO, **McCann Worldgroup**
- » “Celebrate the various approaches—from bespoke boutiques to global platforms—because breadth of thinking is a competitive superpower.” —Marla Kaplowitz, President and CEO, **4As**
- » “The real question isn’t agency vs in-house. It’s do you have the right blend of talent? Because at the end of the day, talent—not structure—is the engine of great marketing.” —Jennifer Harrington, CEO and Founder, **Hatch**
- » “There’s a lot of bait and switch. Sometimes the A or the B team will end up doing the pitch, but then the day-to-day service is done by the C team and that’s why there’s such a high staff turnover.”
—Ajaz Ahmed, Partner, **Studio.One**
- » “The brands that win won’t be the ones clinging to outdated agency structures. They’ll be the ones bold enough to rethink how they get work done.” —Dana Hork, Founder and CEO, **Beers With Friends**
- » “Inclusive advertising is the right thing to do for society. However, this report shows that it is also the right thing for the bottom line.” —Sima Sami Bahous, Executive Director of UN Women, **United Nations**
- » “Skip the agency vs. in-house debate and build around people. It’s about creating a system where great talent thrives, wherever it sits.”
—Jennifer Harrington, CEO and Founder, **Hatch**



- » “To stay relevant in an AI-driven world, marketers must deeply integrate their brands into this new ecosystem, ensuring visibility and preference in the agentic decision-making process.”
—Raja Rajamannar, Chief Marketing and Communications Officer, **Mastercard**
- » “The future of AI in agency compensation hinges on proactive management, legal clarity, and strategic transparency.”
—Christine A. Moore, Managing Partner, **RAUS Global**
- » “Show me someone who says AI is game over for a profession, and I’ll show you someone who knows nothing about that industry and isn’t burdened by curiosity.” —Tom Goodwin, Keynote Speaker and Consultant, **TomGoodwin.co**
- » “There’s still a sense that there’s more CMOs can do to simplify their agency roster and get rid of any unproductive relationships.”
—Ewan McIntyre, VP Analyst, Gartner for Marketers, **Gartner**
- » “Technology is a bridge that allows creativity to scale.”
—Shekhar Gowda, VP Global Marketing Technology, **The Coca-Cola Company**
- » “New business should be a search for the best partner, not a game of Survivor, forcing agencies to compete and undervalue their services.” —Marla Kaplowitz, President and CEO, **4As**
- » “The smart AI-forward agencies are earning higher, not lower, margins because they are pricing the value of AI, not its cost.”
—Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “AI is a force multiplier. If you’re good, it’ll make you better. If you’re lazy, you’ll get exposed.” —Craig Elimeliah, Chief Creative Officer, **Code and Theory**
- » “Procurement is now the link between ambition and execution, risk and resilience, creativity and accountability. In the AI era, procurement isn’t on the sidelines. It’s in the driver’s seat.”
—Ramzi Chaabane, Director, Marketing Indirect Procurement, Advocacy, Influencer and PR Agency Partnerships, **L’Oréal**
- » “Our in-house agency is a core capability that enables our brands to achieve marketing and commercial innovation excellence and bring our corporate strategy to life.” —Melanie Huet, CMO, **Newell Brands**
- » “Businesses don’t inherently want to pay for AI. They would rather pay for outcomes that AI helps unlock.” —Ryan Mason, President and COO, **Markacy**
- » “For those that say the future of production is all AI, it isn’t: the future of production is great humans doing great work that will be enabled by tech.” —David Wheldon, President Emeritus, **WFA**
- » “We’ve built a team of specialists—copywriters, strategists, designers—and we partner with brand leaders to define one focused idea per brief. Then the agencies blow it out.” —Luiz Sanches, Global Chief Creative and Design, **Kimberly-Clark**
- » “Purposeful partnerships aren’t just collaborations, they facilitate real growth!” —Philipp Schuster, Agency and Marketing Partnerships Director, Global Strategic Marketing, Consumer Health, **Bayer**
- » “Right now, it probably feels like shouting about your AI chops is the difference between success and failure. It’s certainly an easy way to claim to be the cleverest kid in the playground. But ultimately, it’s what your clients actually get that really matters. As the old saying goes, don’t tell me you’re a comedian, just make me laugh.”
—Robin Bonn, CEO and Founder, **Co:definery**
- » “You can never have no agencies. We’ve seen it time and time again, brands trying to take things in-house. The magic we bring is this consultative outside thinking and dreaming.”
—Maggie Malek, CEO, **Crispin**
- » “For a long time, the CMO role, the role of the marketer, was about the stories we tell, the splash we make, the ROI we drive. We need to do that, but we’re being asked to step into a bigger role to be the chief transformation architects.” —Lara Balazs, CMO, **Adobe**
- » “As a CMO, my job is not to build what we can get from the outside world. My job is not to build an ad agency or run an ad agency. My goal is to modernize marketing and use data and technology in our storytelling and brand building.” —Drew Panayiotou, CMO, **Keurig Dr Pepper**
- » “AI is trained on the past. Humans are the owners of the future.”
—Margaret McGovern, Executive Creative Director, **Boathouse Group**
- » “Strategy remains human. Strategy remains essential. And in the age of AI, that is what will determine who thrives.” —Javier Rodriguez Horta, Marketing Strategy Senior Consultant, **Overline**
- » “Agencies will need to stop selling outputs and start selling outcomes.”
—Ramzi Chaabane, Director, Marketing Indirect Procurement, Advocacy, Influencer and PR Agency Partnerships, **L’Oréal**
- » “We really are, to some degree, shifting our best domain experts from directly servicing clients to encoding their knowledge into our software and our agents.” —Stephan Pretorius, CTO, **WPP**
- » “Tech and AI will play such a major role in how all agencies respond to RFPs that it will change what the clients expect from our responses.” —Gretchen Walsh, President, **McKinney**
- » “The media organization of the future will look very different from today’s. It will require integration-first thinking, multiskilled talent and clear decisions on what to own internally and what to entrust to partners.” —Jack Shearring, Head of Transformation, **mediasense**
- » “The most competitive marketers in the next five years are not going to be ones that can code...but the ones who are these strategic and empathetic directors of AI tools.” —Alexis Karsant, Senior Director, **Intuit Mailchimp**
- » “Many mid-sized and independent agencies are waiting in the wings to absorb dissatisfied Omnicom and IPG clients.”
—Jay Pattisall, VP and Principal Analyst, **Forrester**

- » “We’re seeing the convergence of creative, data, commerce and technology demand new skills [from WFA Media Forum members], and, potentially, a reimagining of the internal organization itself.”
—Tom Ashby, Global Lead, Media Services, **WFA**
- » “Once singularly focused client partners, marketing agencies are forgoing their franchise to act as agents on behalf of clients.”
—Jay Pattisall, VP and Principal Analyst, **Forrester**
- » “Clients are telling us that they want our offer to be simpler, more integrated, powered by media data and AI, efficiently priced and designed to deliver growth and business outcomes.”
—Cindy Rose, CEO, **WPP**



AI is Rewriting the Rules.

Is Your Agency Compensation Model Keeping Up?

Learn how brand advertisers can align compensation with innovation, speed, and strategic impact in our upcoming article:

“If My Agency Uses AI, Am I Overpaying?”

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Top 15 agencies in the world by 2024 revenue

Scan the code or visit agencymania.com/2025-top-agencies-in-the-world-by-revenue to download a copy of our poster.

Scan here to download:



2025 TOP 15 AGENCIES IN THE WORLD

BY 2024 REVENUE

AREAS OF DISCIPLINE

- 1 Branding
- 2 Brand Consulting + Experience
- 3 Commerce-related Services
- 4 Communication
- 5 Consulting
- 6 Content
- 7 Corporate Trading
- 8 Creative
- 9 Cultural
- 10 Data + Insight
- 11 Design / Brand Strategy
- 12 Digital
- 13 Event Marketing
- 14 Experiential
- 15 Full-Service
- 16 Healthcare
- 17 Innovation
- 18 Marketing
- 19 Marketing Science + Tech
- 20 Media
- 21 Mobile Gaming
- 22 Multidisciplinary
- 23 Out-of-home
- 24 Other
- 25 PR
- 26 Production
- 27 Research
- 28 Specialist Creative
- 29 Sponsorship Consulting
- 30 Strategy / Design



In 2025, Omnicom acquired IPG, forming the world's largest holding company; this change will be reflected in the 2026 Top 15 Agencies in the World poster.

Top 15 agencies in the world by 2024 revenue

Scan the code or visit agencymania.com/2025-top-agencies-in-the-world-by-revenue to download a copy of our poster.

Scan here to download:



| AGENCY | 2023 (Millions) | 2024 (Millions) | % Change (YOY 2023) | % Change (YOY 2024) | Global HQ | Countries | Employees |
|----------------------------------------|--------------------|--------------------|------------------------|------------------------|--------------|-----------|-----------|
| 1 Accenture Song | \$18,000 | \$19,000 | 12.5% | 5.6% | NYC, USA | 120 | 65,126 |
| 2 WPP | \$18,464 | \$18,846 | 3.5% | 2.1% | London, UK | >100 | 107,061 |
| 3 Publicis Groupe | \$16,016 | \$17,349 | 7% | 8.3% | Paris, FR | 110 | 108,000 |
| 4 Omnicom Group | \$14,692.2 | \$15,689 | 2.8% | 6.8% | NYC, USA | >70 | 74,900 |
| 5 Deloitte Digital | \$12,013 | \$12,654 | 16.4% | 5.3% | NYC, USA | 60 | 173,000 |
| 6 Interpublic Group of Cos. | \$10,889 | \$10,692 | -0.4% | -1.8% | NYC, USA | >100 | 53,300 |
| 7 Dentsu Group | \$9,308 | \$9,326 | -2.5% | 0.2% | Tokyo, JPN | 120 | 67,667 |
| 8 BlueFocus Communication Group | \$7,445 | \$8,455 | 36.3% | 13.6% | Beijing, CN | UNK | UNK |
| 9 IBM iX | \$7,075 | \$7,075 | 3.9% | 1.8% | Armonk, USA | >30 | UNK |
| 10 Hakuhodo DY Holdings | \$7,029 | \$6,345 | -5% | -9.7% | Tokyo, JPN | >30 | 29,386 |
| 11 Cheil Worldwide | \$3,170 | \$3,188 | -4.1% | 0.6% | Seoul, SK | 46 | 7,200 |
| 12 Vivendi's Havas | \$3,108 | \$3,099 | 6.6% | -0.3% | Puteaux, FR | >100 | 23,000 |
| 13 TCS Interactive | \$2,806 | \$3,048 | 8% | 8.6% | Mumbai, IN | 55 | UNK |
| 14 Stagwell | \$2,527 | \$2,841 | -6% | 12.4% | NYC, USA | >34 | >13,000 |
| 15 Serviceplan Group | \$2,324 | \$2,661 | UNK | 14.5% | Munich, GER | 24 | 6,500 |

NOTABLE CHANGES FROM 2023-2024

- Accenture Song surpassed WPP to become the world's largest agency company in 2025, ending WPP's tenure at the top from 2009 (based on 2008 revenue) through 2024 (based on 2023 revenue).
- Accenture Song, Deloitte Digital, and Interpublic generated nearly \$40 billion in 2024 revenue. Accenture Song's No. 1 spot shows the rise of consulting firms in agency rankings, rivaling the scale of top holding companies.
- Currently ranked fourth by 2024 revenue, Omnicom is positioned to become the leading agency company pending its acquisition of sixth-ranked Interpublic in late 2025.
- Munich-based Serviceplan Group made the top 15 list, ranking at No. 15.
- Revenue for the world's 25 biggest agency companies increased 3.6% in 2024 to a record \$153 billion. The top five legacy agency holding companies—WPP, Publicis Groupe, Omnicom, Interpublic, and Dentsu Group—accounted for nearly half (\$72 billion) of that revenue (Ad Age).
- Despite revenue growth for top agency companies in 2024, automation, AI, and efficiency mandates drove leaner models. The five largest holding companies cut global staff by 2.2% (Ad Age).





Work & performance:

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





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

Year-end summary

January-February 2025 | Volume 80

Should we expect chaos in creativity in 2025? AI will eventually power everything we use, without a doubt. It will even translate dog whining apparently. We are seeing AI agents come up. Accenture launched 12 agents to handle marketing-related activities such as optimizing campaigns and centralizing different sources of data to provide campaign insights. CES in January was such a powerful showcase of innovation.

Topics included AI-powered personalization; inclusive and accessible tech; sustainability and eco-conscious products; social impact and cultural responsibility; culturally relevant content creation; digital human and virtual experiences; smart devices for every lifestyle; next-gen advertising platforms; and data privacy awareness.

March-April 2025 | Volume 81

The top Super Bowl LIX commercials varied across multiple rankings, with Pfizer's "Knock Out," Doritos' "Abduction," and Budweiser's "First Delivery" consistently ranking among the most liked and talked-about ads.

USA Today's Ad Meter placed Budweiser's ad at the top, while Link AI highlighted Ram's "Goldilocks & the Three Trucks" and Coffee mate's "Foam Diva" for impact. Adweek's rankings favored Doritos, Budweiser, and Lay's, while System1's decade-wide analysis ranked Lay's "Little Farmer" highest for long-term brand-building potential. Tubi led social media buzz, followed by Doritos' fan-created "Abduction" ad, which was part of the revived "Crash the Super Bowl" contest.

In other happenings, AMC Networks introduced AMCN Outcomes for performance measurement, while The Drum spotlighted agencies to watch in 2025, including Code and Theory, Unlimited, and The Kitchen North America.

May-June 2025 | Volume 82

AI, data unification, and bold creative strategies are shaping the latest wave of marketing innovation. The ANA recommends that CMOs embrace a seven-point roadmap to elevate measurement—from audits and unified taxonomies to training and AI adoption.

Meanwhile, new findings from UN Women and the Oxford Saïd Business School confirm that inclusive advertising isn't just ethical—it's profitable, significantly boosting sales, loyalty, brand equity, and pricing power. Dentsu's takeaways from Adobe Summit 2025 further emphasize AI's growing role in reimagining content supply chains, customer loyalty, and B2B transformation. The throughline: Innovation meets intention when data, creativity, and inclusivity converge.

July-August 2025 | Volume 83

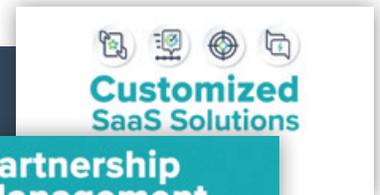
Is the economy at risk? According to Adobe, Amazon's Prime Day summer sales event generated \$24.1 billion, a 30% YOY increase, and an indication that the US economy and consumer confidence remain healthy. We may be creating more content, faster, and cheaper. We are pushing more through a limited number of channels to overly stimulated consumers.

So, is it also more effective? Probably not. Human creativity has never been more valued. How do you breakthrough through the clutter? How do you engage consumers and add value to their lives in the process? The tools are changing. The ways of working are changing. Technology is the enabler. But the fundamentals of marketing remain. Will marketers rise to the challenge? No doubt. Check out the recognition that brands and agencies are rightfully being awarded for upleveling their craft.

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September-October 2025 | Volume 84

In a dazzling showcase of technology and artistry, *The Wizard of Oz* returned to the big screen, reborn through advanced AI and cloud innovation using Google Cloud, Veo, Imagen, and Gemini. Every 1939 frame was transformed into ultra-high-definition imagery for the premiere at the Las Vegas Sphere, symbolizing how AI can restore, reimagine, and reinvent storytelling.

Across the marketing and media landscape, the same transformation is underway. Agencies and brands are using AI to redefine value, precision, and creativity—where procurement evolves from cost control to strategic architecture, and benchmarking becomes a lever for transparency and ROI. Retail media now spans both physical and digital worlds, demanding new KPI frameworks and data ownership. And the art of creative feedback—rooted in inspiration, clarity, and trust—remains more vital than ever as automation accelerates.

As industry recognition highlights innovation from McCann to VML to Zulu Alpha Kilo, one message resonates: Technology alone doesn't create magic—vision does. AI provides the canvas; creativity paints the masterpiece. The future of marketing is not machine-made, it's human-amplified.

November-December 2025 | Volume 85

Influencer marketing has surged into the mainstream, yet the industry still wrestles with proving impact—only a quarter of brands can tie efforts to sales even as budgets climb. Cultural relevance is now seen as the operating system of human behavior, but most companies fall short of activating it meaningfully.

Meanwhile, AI continues to reshape marketing at breathtaking speed: from Kantar's sweeping 2026 trends—which spotlight synthetic data, micro-communities, and creative intelligence—to Emplifi's findings that marketers are doubling down on AI-driven productivity, predictive analytics, automated creative, and short-form content.

The creative landscape is being rewritten in real-time, with Svedka's fully generative Super Bowl ad marking a bold new frontier and award winners across the globe—from Garage Beer's authenticity-powered rise to Dentsu Creative New York's Grand Prix streak—proving that courage, innovation, and cultural acuity fuel disproportionate wins.

Across campaigns, categories, and continents, the message is unmistakable: The brands and agencies shaping the future are those daring enough to reinvent the rules. The future doesn't wait; boldness wins, brilliance scales, and reinvention rewards the brave. No more guesswork. No more waste. Better work is what all brand advertisers are aspiring to do in 2026.





Awards & recognition

» GAME CHANGING

- Per Ad Age, based on their top 25, here are the **top 10 ads of 2025**:
 1. “Zohran for New York City” (Agency: Forge)
 2. ChatGPT: “Dish, Pull-Up, Road Trip” (Isle of Any)
 3. “Mr. Submarine: 50 Years,” 50 Commercials (Quality Meats)
 4. Polaroid: “The Camera for an Analog Life” (in-house)
 5. The New York Times: “It’s Your World to Understand” (Isle of Any)
 6. Gap: “Better in Denim” (Gap and Invisible Dynamics)
 7. Apple TV: “The Cube” (Kamp Grizzly)
 8. Nike: “So Win” (Wieden+Kennedy Portland)
 9. Craft Sportswear: “Run, Like We’re Meant To” (Forsman & Bodenfors)
 10. Ralph Lauren: “A Portrait of the American Dream—Oak Bluffs” (in-house)



» HIGH IMPACT

- **Havas** reported a strong 2024 with the following key achievements:
 1. Launched a global new operating system and its four pillars (intelligence, design, activate, measure) called Havas Converged
 2. Was publicly listed on Euronext Amsterdam
 3. Was named US #1 Agency Globally for Creativity by WARC and was crowned #1 Most Innovative Company in Advertising and Marketing by Fast Company
 4. Won more than 1,600 new clients (including Nespresso, FedEx, KPMG, Guinness, Nomad Foods, and Wyndham Hotels)
 5. Won more than 1,400 awards during industry events
 6. Acquired 35 agencies (Wilderness, DPMG, Liquid, etc.)
 7. Invested millions in tech and innovation (€400 million tech investment over the next four years)
 8. Earned an 8+ global average client and team satisfaction score
- Per **The One Club for Creativity**, Interpublic Group’s FCB won the top spot, followed by Rethink Toronto, McCann New York, TBWA\Media Arts Lab Los Angeles, and Serviceplan Germany Munich. FCB New York won Global Agency of the Year, and FCB Global won Agency Network of the Year for 2024 (followed by Ogilvy Group and VML). Top in-house agencies: Google Brand Studio, Apple Marcom, and Superette (DoorDash).
- Per System1 and its **top Super Bowl ads (of the decade) by “Star Rating” for “long-term brand building potential”**:
 1. Lay’s (Highdive) “Little Farmer” (5.9 Stars)
 2. NFL (72andSunny) “Somebody | It Takes All of Us” (5.6 Stars)
 3. WeatherTech (Pinnacle Advertising) “Whatever Comes Your Way” (5.2 Stars)
 4. NFL (72andSunny) “Flag 50” (4.9 Stars)
 5. Häagen-Dazs (nice&frank) “Not So Fast, Not So Furious” (4.7 Stars)
 6. Stella Artois (Artists Equity) “David & Dave: The Other David” (4.5 Stars)
 7. Doritos (Dylan Bradshaw) “Abduction” (4.4 Stars)
 8. Pfizer (Publicis Co Lab) “Knock Out” (4.4 Stars)
 9. Nerds (Digitas Chicago) “Nerds Big Game Commercial ft. Shaboozey” (4.3 Stars)
 10. Reese’s (Erich & Kallman) “Don’t Eat Lava” (4.1 Stars)
- Nike received the **Big Game Super Clio award** for its “So Win” commercial developed by Wieden+Kennedy Portland and celebrating women athletes during the Super Bowl. The spot features Sabrina Ionescu, Jordan Chiles, Caitlin Clark, Sha’Carri Richardson, A’ja Wilson, Aryna Sabalenka, Sophia Wilson, JuJu Watkins, and Alexia Putellas.



- Per **The Drum's World Creative Rankings**, **WPP** was the most awarded holding company in the world (for four years in a row). WPP-owned agencies ranked as the most awarded Agency Network, with Ogilvy coming on top and VML second, ahead of IPG's McCann and Omnicom-owned DDB. Most awarded CCO in the world was Liz Taylor, Ogilvy's global chief creative officer, with six campaigns that made the top 100 most awarded campaign list. The world's most awarded agency was FCB New York. The most awarded advertiser was Michelob owner AB InBev (for three years in a row), followed by Unilever and Apple. FCB New York's "Dreamcaster" for AB InBev (Michelob) was named the world's most successful campaign.
- Omnicom Precision Marketing Group and WPP's VML were named as the two leaders in **The Forrester Wave: Marketing Creative and Content Services, Q1 2025** report by Forrester Research. Strong performers included Dentsu Creative, McCann, Accenture, Omnicom Advertising Group, and Ogilvy. Contenders were Monks, Publicis Worldwide, and Havas.
- Per **APR Consulting**, AI is revolutionizing "each stage of the creative and production lifecycle while opening doors to impactful and forward-thinking marketing strategies," strengthening efficiency, cutting costs, and exceeding quality benchmarks in output: strategy and creative development, pre-production, production, post-production, and delivery.
- **The Cannes Lions International Festival of Creativity** named Brazil as 2025 Creative Country of the Year, a new award recognizing a country's consistent success at the festival as well as "a country's exceptional and enduring commitment to creativity that drives progress and growth."
- **Dentsu** won Network of the Year for the fourth straight year (and its ninth title since 1998) at ADFEST 2025, an Asia-Pacific advertising festival in Pattaya, Thailand, for the most creative network (group of companies). Dentsu won a total of 43 awards (9 gold, 15 silver, 19 bronze).
- Apple was named the Cannes Lions 2025 Creative Marketer of the Year. Apple's campaign "**Shot on iPhone**" won a new Lions subcategory, Creative Effectiveness—Long-Term Brand Platform, which required entries to include three or more distinct campaigns within a broader brand strategy that has been in the market for at least three years. At least one of those campaigns must have won or been shortlisted at Cannes Lions in 2022, 2023, or 2024.
- **Omnicom** was named the Most Effective Holding Group in the 2024 Effie Index®, for the second year in a row. Among Omnicom's agency networks, BBDO Worldwide ranked third and DDB Worldwide ranked fourth as the Most Effective Agency Networks. AlmapBBDO was named the Most Effective Agency Office globally for the second consecutive year. Regionally, Omnicom was named the #1 Holding Group in Latin America, with BBDO Worldwide as the top agency network and AlmapBBDO as the top agency. Omnicom was also named Holding Company of the Year by Gerety, MediaPost, and WARC for its Effective 100 list.
- **WPP** was named Creative Company of the Year at the Cannes Lions International Festival of Creativity for a second consecutive year, based on which holding company's member agencies earn the most points for shortlisted and awarded entries. WPP agencies collected 168 Lions, including one Titanium, 10 Grand Prix (including the Glass Lion for Change), 23 Gold, 53 Silver, and 81 Bronze.
- Per **The Drum Awards 2025** Grand Finale, winners included:
 1. The Romans (Independent Agency of the Year), Interpublic Group (Holding Company of the Year)
 2. Area 23 (Network Agency of the Year)
 3. Stein (B2B Agency of the Year)
 4. Hopeful Monsters (Underdog Agency of the Year)
 5. Unilever (Advertiser of the Year)
 6. Grand Prix of Grand Prix 2025 was Dentsu Creative New York for Mondelēz International
 7. In advertising, Grand Prix Gold Winner was Made To Share by VCCP for Mondelēz International
 8. Integrated Campaigns Gold winner was Glassphemy by VML UK for Diageo
- Top winners of **The Drum Awards Festival and its Social Media Awards 2025** included Dentsu Creative New York and Mondelēz International—Grand Prix winners at the Social Media Awards 2025 for the "Nutter Butter, You Good?" campaign, which targeted Gen Z through TikTok.

Other notable winners:

 1. Ogilvy UK for First Choice (gold in President's Award)
 2. Samy for McLaren Automotive (gold in Automotive category)
 3. RAGÚ x Hot Ones: A Spicy Partnership by Digitas for Mizkan America
 4. Custard by Giggs: How Oatly and Jellyfish Turned a DM into a Cultural Moment by Jellyfish for Oatly (Gold—Brand Partnership or Collaboration)
 5. Turning Mum and Dad's Bank into a Student Must-Have by Union Direct for Bank of Scotland (Gold—B2B, Finance & Professional Services)
 6. Twitch x Pot Noodle: Slurp & Conquer Quest by Twitch for Unilever (Gold—CPG & Food and Beverage)
 7. Hilton: Huddle without Hassle by TBWA\Singapore for Hilton (Gold—Celebrity Partnership)



» NOTABLE

- Per Ad Age, **top 10 best ads of 2024** were:
 1. Nike “Winning Isn’t Comfortable” (Wieden+Kennedy Portland)
 2. Roku “Less Screaming, More Streaming” (Fellow Kids)
 3. Telstra “Better on a Better Mobile Network” (Bear Meets Eagle on Fire)
 4. CeraVe “Michael CeraVe” (Ogilvy PR)
 5. Pop-Tarts “Edible Mascot” (Weber Shandwick)
 6. Penny “Price Packs” (Serviceplan)
 7. Visit Oslo “Is It Even a City?” (NewsLab AS)
 8. Volvo “Moments That Never Happen” (Newland)
 9. Apple “Flock” (TBWA/Media Arts Lab)
 10. Lynx “Robbery” (LOLA MullenLowe)



- Per Adweek’s **2024 Agency of the Year** awards:
 1. Quality Meats (Small Agency of the Year)
 2. Mischief @ No Fixed Address (Midsize Agency of the Year)
 3. Deutsch (US Agency of the Year)
 4. Mother London (International Agency of the Year)
 5. TBWA (Global Agency of the Year)
 6. Miramar (Breakthrough Agency of the Year)
 7. Majority (Multicultural Agency of the Year)
- Tank Worldwide Canada was named Ad Agency of the Year at the **Lisbon International Advertising Festival**, taking home five awards in key categories, including Best Use of Digital.
- Other noteworthy winners:
 1. Ogilvy Health London (Grand Prix) in the Lisbon Health category for the “Melanoma Law” campaign (Skin Cancer UK)
 2. Havas Lynx NY (Gold) for its “Younger Than You Think” campaign (Eisai)
 3. Diamond (Gold) in the Lisbon PR category for its “Welcome to Trafficking School” campaign (The Joy Smith Foundation)

- **MediaPost** named IPG Mediabrands as Media Agency of the Year, Giant Spoon as Independent Agency of the Year, Omnicom as Holding Company of the Year, and Mattel’s Lisa McKnight as Marketer of the Year.

- Per TV measurement firm iSpot.tv, **top 10 Super Bowl LIX commercials (based on “likability”)** were:

| | |
|----------------------------------------------------|-------------------------------------------|
| 1. Pfizer: “Knock Out” | 6. Rocket Mortgage: “Own the Dream” |
| 2. Doritos: “Abduction” | 7. NFL: “Somebody” |
| 3. Budweiser: “First Delivery” | 8. Nerds: “Wonderful World of Nerds” |
| 4. Booking.com: “Get Your Stay Ridiculously Right” | 9. Reese’s: “Don’t Eat Lava” |
| 5. Little Caesars: “Whoa” | 10. Pringles: “The Call of The Mustaches” |

- Per USA Today’s Ad Meter, **top 10 commercial winners of the Super Bowl** were:
 1. Budweiser “First Delivery” (FCB New York)
 2. Lay’s “The Little Farmer” (Highdive)
 3. Michelob ULTRA “The ULTRA Hustle” (Wieden+Kennedy)
 4. Stella Artois “David & Dave: The Other David” (Artists Equity Advertising)
 5. NFL “Somebody” (72andSunny)
 6. NFL “Flag 50” (72andSunny)
 7. Bud Light “Big Men on Cul-De-Sac” (Anomaly New York)
 8. Uber Eats “Century of Cravings” (Special Group U.S.)
 9. Hellmann’s “When Sally Met Hellmann’s” (VML)
 10. Pfizer “Knock Out” (Le Truc, Leo New York, Publicis Collective)

- Per Link AI, **top 10 commercials (based on impact, power, and enjoyment ratings)** were:

| | |
|----------------------------------------|-----------------------------------|
| 1. Ram “Goldilocks & the Three Trucks” | 6. Nerds “Wonderful World” |
| 2. Coffee mate “Foam Diva” | 7. Little Caesars “Whoa!” |
| 3. Reese’s “Don’t Eat Lava” | 8. Ritz “Salty Club” |
| 4. Booking.com “Ridiculously Right” | 9. Bosch “The More You Bosch” |
| 5. Dunkin’ “DunKings2” | 10. Hims & Hers “This is America” |

- **Bottom performers** were:

| | |
|-----------------------------------------|-------------------------------------------|
| 1. Rocket “Own the Dream” | 6. WeatherTech “Born to be Wild” |
| 2. T-Mobile “A New Era in Connectivity” | 7. Tubi “Born to Love Westerns :15” |
| 3. NerdWallet “Genius Beluga” | 8. FanDuel “The Dream” |
| 4. Skechers “Side Hustle” | 9. NFL “Somebody” |
| 5. TurboTax “Now Taxes is So Sweet” | 10. Squarespace “Tale as Old as Websites” |



- Per Adweek’s **Ultimate Super Bowl Ad Ranker**, top performers (based on online chatter, viewer engagement, and emotional response) were:
 1. A three-way tie: Doritos (“Abduction”), Budweiser (“First Delivery”), and Lay’s (“The Little Farmer”)
 2. Ram (“Drive Your Own Story”)
 3. Bud Light (“Big Men on Cul-de-Sac”)
 4. Little Caesars (“Whoa!”)
 5. Nike (“So Win”)
- Per Ad Age, **top agencies of the year since 2000:**

| | |
|----------------------------------------------------|----------------------------------------------|
| 1. Interpublic’s McCann-Erickson (2000) | 13. Dentsu’s mcgarrybowen (2012) |
| 2. Omnicom’s Goodby, Silverstein & Partners (2001) | 14. MDC Partners’ 72andSunny (2013) |
| 3. WPP’s Ogilvy & Mather (2002) | 15. WPP’s Grey (2014) |
| 4. Interpublic’s Deutsch (2003) | 16. Interpublic’s RGA (2015) |
| 5. WPP’s Berlin Cameron/Red Cell (2004) | 17. indie Droga5 (2016) |
| 6. MDC Partners’ Crispin Porter & Bogusky (2005) | 18. MDC Partners’ Anomaly (2017) |
| 7. Omnicom’s BBDO (2006) | 19. indie Wieden+Kennedy (2018) |
| 8. “The Consumer” (2007) | 20. indie Wieden+Kennedy (2019) |
| 9. Omnicom’s Goodby, Silverstein & Partners (2008) | 21. indie Wieden+Kennedy (2020) |
| 10. MDC Partners’ Crispin Porter & Bogusky (2009) | 22. Accenture Song’s Droga5 (2021) |
| 11. Dentsu’s mcgarrybowen (2010) | 23. indie Mischief @ No Fixed Address (2022) |
| 12. indie Wieden+Kennedy (2011) | 24. Interpublic’s The Martin Agency (2023) |
| | 25. indie Mischief @ No Fixed Address (2024) |

- Per **Ad Age 2025 Agency A-List:**

| | | |
|----------------------------------|-----------------------------|---------------|
| 1. Tombras as Agency of the Year | 4. Highdive | 7. Alto |
| 2. Mischief @ No Fixed Address | 5. Uncommon Creative Studio | 8. Majority |
| 3. Anomaly | 6. Known | 9. 72andSunny |
| | | 10. BBH USA |
- **Other awards included:**

| | |
|--------------------------------------------------------------|--------------------------------------------------------------------------------|
| 1. Agency Network of the Year: Ogilvy | 12. Independent Agency Network of the Year: Serviceplan Group |
| 2. B2B Agency of the Year: Code and Theory | 13. International Agency of the Year: Rethink |
| 3. Best Agency Culture: Hunterblu Media | 14. Media Agency of the Year: OMD |
| 4. Business Transformation Agency of the Year: Gale | 15. Multicultural Agency of the Year: IW Group |
| 5. Comeback Agency of the Year: MadWell | 16. Newcomer Agency of the Year: Bandits&Friends |
| 6. Creative Agency of the Year: Wieden+Kennedy | 17. Performance Marketing Agency of the Year: Wpromote |
| 7. Data & Insight Agency of the Year: Known | 18. Purpose-led Agency of the Year: Oberland |
| 8. Design & Branding Agency of the Year: Collins | 19. Social Media/Influencer Agency of the Year: Whalar Group |
| 9. Experiential Agency of the Year: Cartwheel & Co Marketing | 20. Sports/Entertainment Agency of the Year: United Entertainment Group |
| 10. In-house Agency of the Year: Amazon XCM | 21. Top 3 Production Agencies of the Year: Smuggler, Prettybird, and Love Song |
| 11. Independent Agency of the Year: Terri&Sandy | |

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- Per **AdForum’s 2024 Business Creative Report**, based on more than 40 awards shows, including Cannes Lions, Epica, Golden Drum, The Creative Circle, FAB, and Clio Health, top winners were:
 1. Automobile: Publicis Conseil, Paris, Jung von Matt AG, Hamburg, AlmapBBDO, São Paulo
 2. Entertainment & Leisure: AV Squad, Los Angeles, McCann London, FCB Chicago
 3. Finance: McCann Poland, Warszawa, The Leo Burnett Group Thailand, Bangkok, AKQA, Amsterdam
 4. Food & Beverages: Rethink Communications, Toronto, FCB New York, LePub (HQ), Milano
 5. Health & Beauty: Ogilvy Public Relations Worldwide, New York, Serviceplan Germany, Munich, Ogilvy, London
 6. Luxury: DM9DDB, São Paulo, Jung von Matt AG, Hamburg, Marcel, Paris
 7. Retail: DAVID, Madrid, VML Grey Colombia, Bogotá, HeimatTBWA, Berlin
 8. Tech: TBWA\Media Arts Lab, Los Angeles, Creative X, San Francisco, McCann London
 9. Transport & Tourism: Dentsu, Tokyo, Leo Burnett Jeddah, Six Tokyo



Celebrate the various approaches—from bespoke boutiques to global platforms—because breadth of thinking is a competitive superpower.”

—Marla Kaplowitz, President and CEO, **4As**



- **MediaPost** awarded Giant Spoon as 2025 Independent Agency of the Year, Interpublic’s Mediabrands as Media Agency of the Year, and Omnicom as Holding Company of the Year.
- Marcel Marcondes, global chief marketing officer at AB InBev, won the **2024 WFA Global Marketer of the Year** as a result of AB InBev now having eight of the top 10 most valuable beer brands worldwide, including Corona at #1 and Budweiser at #2. AB InBev was named Cannes Lions’ Creative Marketer of the Year for 2022 and 2023, becoming the first brand owner to win it for two consecutive years. In 2024 the company was named Top Advertiser for Creativity by WARC for the third year running.

- Per Fast Company, **top 15 most innovative companies in advertising and marketing:**

- | | |
|-----------------------------------------------|-------------------------------------------------------|
| 1. Liquid Death (brand collab) | 9. New York Liberty (WNBA champion and mascot) |
| 2. Superconnector Studios (fun brand work) | 10. Yeti (artful branded content) |
| 3. Airbnb (epic marketing) | 11. FCB (F1 and Michelob Ultra) |
| 4. NewsLab (fun tourism ad) | 12. The Martin Agency (Snoop Dogg collab) |
| 5. Johannes Leonardo (basketball sneaker ads) | 13. Nutter Butter (social brand strategy) |
| 6. McCann Worldgroup (Xbox) | 14. TBWA\Worldwide (CollectiveAI platform) |
| 7. Wieden+Kennedy (Caitlin Clark/WNBA) | 15. Uncommon Creative Studio (New York City campaign) |
| 8. Saucony (“the Marathumb Challenge”) | |

- Per **Ad Age Creativity Awards 2025**, top winners included:

1. Chili’s Grill & Bar (Brand of the Year)
2. Duolingo (Best Brand Social Media Presence)
3. Bark “Bark Air” (Best Brand/Product Launch of the Year)
4. Coors Banquet x Wrangler “Beer Wash Jeans” (Best Partnership/Collaboration of the Year)
5. Chili’s Grill & Bar (Best ROI: Work that Works)
6. Adidas “Hey Jude” (Best Use of Music)
7. O2 “Scambaiters” (Best Use of AI)
8. PetPace “Animal Alerts” (Tech Innovation of the Year and Creative Data Campaign of the Year)
9. Heineken “Pub Museums” (Best B2B Campaign of the Year)
10. NHS Blood and Transplant “Waiting to Live” (Experiential Campaign of the Year)
11. Nutter Butter, “Nutter Butter, You Good?” (Social Campaign of the Year and Best Use of TikTok)
12. Vaseline “Transition Body Lotion” (Best Work for Good: Brand)
13. The Prison Library Project “Contrabanned” (Best Work for Good: Pro Bono/Nonprofit)
14. Xbox Football Manager 2024 “The Everyday Tactician” (Branded Entertainment/Content Campaign of the Year)
15. British Airways “Windows” (Print/Design/Out-of-Home Work of the Year)
16. Nike “Am I a Bad Person” (Film/TV/Video of the Year)
17. McDonald’s “WcDonald’s” (Craft of the Year: Print/Design/Out-of-Home)
18. Spotify “Spreadbeats” (Craft of the Year: Digital/Tech)
19. Apple “Flock” (Craft of the Year: Film)
20. Facebook “Yes, Couch!” (Tiny but Mighty)
21. CeraVe “Michael CeraVe” (Campaign of the Year)



- **2025 Clio Awards** winners included: Spotify and JCDecaux, which won four Grand Clio Awards for their work: Spotify for its “Spreadbeats” campaign from FCB New York and the “Meet Marina Prieto” campaign by David Madrid, as well as Creative Use of Data, Design, Design Craft, and Direct categories within B2B. JCDecaux won for Creative Effectiveness, Creative Strategy, Out of Home, and Use of Influencers. FCB New York: Agency of the Year. Ogilvy: Network of the Year. Serviceplan Germany: Independent Agency of the Year. Prettybird: Production Company of the Year. Heineken: Advertiser of the Year.
- Per **The One Show Global Creative Rankings**, FCB New York was the world’s top agency for the second year in a row thanks to its two highest-ranked entries: “Spreadbeats” for Spotify and “Lap of Legends” for AB InBev brand Michelob Ultra. The agency was awarded Best of Show (for “Spreadbeats”), five Best of Discipline awards, one Penta Pencil, 35 Golds, 18 Silver, 9 Bronze, and 23 Merits in The One Show 2025.
- Highlighted campaign at Cannes Lions: **Dove’s** influential and long-running (21 years) “**Campaign for Real Beauty**” continues to rack up accolades, winning the Grand Prix for Creative Strategy – Long-Term Brand Platform. The Real Beauty platform also received the Grand Prix in Media.
- **Goodby Silverstein & Partners for Cheetos** (“The Other Hand”) was named Best of Show at the 2025 American Advertising Awards (Addys), sponsored by the American Advertising Federation. It’s the second time in the past three years that work for Cheetos from Goodby has taken home Best of Show.

ON SCOPE
THE MARKETING PODCAST

Episode 24:
The Hidden Costs of Agency Reviews

FEATURING:

Bruno Galpois
Co-Founder and Principal
at Agency Mania Solutions

Listen to this episode and more from ANA Studios at ana.net/podcast. **ANA**

The Hidden Costs of Agency Reviews with Bruno Galpois

Rethink Your Agency Strategy >> Fix Agency Relationships Before Hitting Reset. During an appearance on the On Scope podcast, Bruno discussed key takeaways from the ANA’s report, “The Cost of the Pitch,” specifically highlighting how agency reviews often wind up costing more than the perceived value they provide.

Along with host Mike Berberich, Bruno covered why the agency review is a go-to move for brands and how it’s a misguided philosophy, what contributes to ballooning review period costs, and how to determine if your current agency model is a problem and if it’s truly time for a review.

To watch the video, scan this code or visit: ana.net/miccontent/show/id/onscope-2025-07-gralpois-hidden-costs-of-agency-reviews.





- Per **2025 Clio Health Awards**:
 1. Agency of the Year: Area 23, an IPG Health agency
 2. Independent Agency of the Year: Klick Health
 3. Network of the Year: IPG Health
 4. Advertiser of the Year: tie between Callen-Lorde and Dramamine

Dramamine’s “The Last Barf Bag” from FCB Chicago and Cemento Sol’s “Sightwalks” from Circus Grey won three Grand Clios each. IPG Health’s Area 23 won four Grands, two for Siemens Healthineers’ “Magnetic Stories” and two for “In Transit” for Callen-Lorde Hospital, the MTA, and the NYC LGBT Historic Sites Project.

Other grand winners included:

 1. Serviceplan Germany and L&C NYC for PetPace’s “Animal Alerts”
 2. Quality Experience for Tonal’s “Stop Working Out in the Past”
 3. Agency Anónimo and Catatonia Films for Save the Children’s “Fer”
 4. Patients & Purpose for Claremont Forum, Prison Library Project’s “Contrabanned”
 5. FCB Canada for SickKids Foundation’s “The Count”
- French agency **Publicis Conseil** won Cannes Lions Agency of the Year 2025, taking home 18 Lions (and 46 shortlists) across campaigns for AXA, Renault, Orange, and Nescafé. It was the second consecutive year Publicis Conseil won Agency of the Year.
- Per Cannes Lions 2025, **Grand Prix** winners included:
 1. Dove’s “Real Beauty” (Lion for Change)
 2. AXA’s “Three Words” (Titanium and Direct)
 3. Channel 4’s “Considering What?” and L’Oréal’s “The Final Copy of Ilon Specht” (Film)
 4. “The Best Place in the World to Have Herpes” for the New Zealand Herpes Foundation (Good and Health for Good)
 5. Museum for the United Nations—UN Live and Spotify (Innovation)
 6. AXA’s “Three Words” created with Publicis Conseil Paris (Creative Business Transformation)
 7. Ziploc’s “Preserved Promos” (Creative Commerce)
 8. Apple’s “Shot on iPhone” (Creative Effectiveness)
 9. Dove’s “Real Beauty” (Creative Strategy and Media)
 10. LVMH’s “The Partnership That Changed Everything” (Luxury and Lifestyle)
 11. FCB Chicago’s “Caption With Intention” (Brand Experience & Activation and Design and Digital Craft)
 12. GoDaddy’s Super Bowl campaign with Walton Goggins
 13. “Act Like You Know,” (Creative B2B)
 14. Indian Railways “Lucky Yatra,” (PR)
 15. Ogilvy Singapore’s “Vaseline Verified” (Social & Creator)
 16. Hyundai’s “Night Fishing” (Entertainment)
 17. Mercado Libre’s Call of Duty takeover (Gaming)
 18. Bad Bunny’s ingenious album release campaign (Music)
 19. Clash of Clans’ “Haaland Payback Time” (Sport Entertainment)
 20. Telstra’s “Better on a Better Mobile Network” (Film Craft)
 21. Instituto Yduqs and IDOMED’s “Nigrum Corpus” (Industry Craft)
 22. Vaseline’s “Vaseline Verified” (Health & Wellness)
 23. KitKat and the Paris 2024 Olympic Games Opening Ceremony (Outdoor)
 24. Viagra “Make Love Last” (Pharma)
 25. Penny’s “Price Packs” (Print and Publishing)
 26. Budweiser’s “One Second Ads” (Radio & Audio)
- Per **Ad Age’s Small Agency Awards 2025**, the following won Gold (WorkInProgress) and Silver (Mirimar):
 1. Based on company size:
 - 1-10 employees: Gold (SuperHeros), Silver (Biite)
 - 11-75 employees Gold (Courage), Silver (BSSP)
 - 76-150 employees Gold (Preacher), Silver (Saylor)
 2. Data & Insights: Gold (Response Media), Silver (Vision Insights)
 3. Design: Gold (Selman), Silver (Moxie Sozo)
 4. Experiential: Gold (Civic), Silver (Think True)
 5. Media: Gold (Noble People), Silver (Stella Rising)
 6. Newcomer: Gold (American Haiku), Silver (Springtime)
 7. Public relations: Gold (Berk Communications), Silver (Genuine Article)
 8. Purpose-led: Gold (Values Partnerships), Silver (DCX Growth Accelerator)
 9. Best Agency Culture: Gold (3Headed Monster), Silver (Doe-Anderson)
 10. Campaign of the Year (Best Use of AI): Schneiders “Schneiders vs SchnAlders” (Fuse Create) and Avocados From Mexico “Call Gronk on the Guacline” (270B)
 11. Campaign of the Year (Media): Field Roast Grain Meat Co
 12. “Bratwurst Summer” (No Fixed Address) and Domino’s “Emergency Pizza 2.0” (WorkInProgress)
 13. Campaign of the Year (Integrated): Uber Eats “Football is for Food” (Special US) and Panda Express “Lunar New Year” (Opinionated)
- Per Adweek, **Agency of the Year 2025 Shortlist** includes:
 1. Agency Network: Acceleration Community of Companies (ACC), FCB, GUT, McCann, MSQ Partners
 2. Global: JOAN Creative, McCann, VML, Wieden+Kennedy
 3. Multicultural: alma, DDB Latina Puerto Rico, IW Group, the community
 4. Independent: Known, Giant Spoon, Mischief @ No Fixed Address, Rethink, Special US
 5. Innovation: Code and Theory, Digitas, FIG, Silverside, Zulu Alpha Kilo
 6. Social Media/Influencer: ATTN:, Billion Dollar Boy, Loop, VaynerMedia, Whalar Group Other categories include: International, Small, Midsize, Breakthrough, and US



- Columbus, Ohio-based **Garage Beer** was named Ad Age Marketer of the Year for 2025, winning praise for turning creativity, humor, and an engaged fan community into explosive growth-proof that authenticity beats big budgets when a brand dares to be itself, especially while growing when much of the beer category is declining. The firm has a six-person marketing team (mostly in-house creative) and is known for grassroots-heavy sponsorships, organic growth via social media, community engagement, and giveaways.
- Per **Adweek**, *Mischief @ No Fixed Address* was awarded 2025 US Agency of the Year. Other 2025 winners included:
 1. Billion Dollar Boy as Social/ Influencer Agency of the Year
 2. Special US as Breakthrough Agency of the Year
 3. Wieden+Kennedy as Global Agency of the Year
 4. IW Group as Multicultural Agency of the Year
 5. Mirimar as Small Agency of the Year
 6. Known as Midsize Agency of the Year
 7. Code and Theory as Innovation Agency of the Year
 8. FCB as Agency Network of the Year
 9. Rethink as Independent Agency of the Year
 10. VCCP as International Agency of the Year
- Per **Agency Compile 2025 New Business Awards**, celebrating teams at the forefront of agency growth, top teams of the year were: BarkleyOKRP (large agency), XD Agency (midsize agency), and Press Kitchen (small agency). Finalists included Havas North America, Digitas, Highdive, Allen & Gerritsen, and Mason.
- Per **MediaPost**, MRM's (formerly part of Interpublic's McCann Worldgroup, now part of Omnicom's Omnicom Precision Marketing Group) ARM (AI Relationship Management) practice was awarded 2025 Media Agency of the Year. Other winners included PMG as Independent Agency of the Year and WPP Media as Holding Company of the Year.

Creativity & noteworthy work

» GAME CHANGING

- Per the **2025 Cannes Lions International Festival of Creativity**, key takeaways about creativity:
 1. Humanity is a competitive edge
 2. Speed isn't always the solution
 3. Authenticity cuts through
 4. Winners take risks

» HIGH IMPACT

- Telecom giant **Vodafone** created a spot entirely with AI-generated imagery, called "Rhythm of Life," with UK-based agencies New Commercial Arts and Design Bridge and Partners, as well as New Zealand-based Sleeper and production house Lipstick. The spot, which is targeted at the European market, was produced with 10 AI creators and the AI production platform ComfyUI.
- **Doritos** conducted its "Crash the Super Bowl" contest for the Super Bowl, after a nine-year hiatus, challenging creators and brand fans to produce a 30-second Super Bowl ad for Doritos without using AI imagery. The prize: \$1 million and a trip to attend the game. The brand selected 25 semifinalists by allowing fans to vote for their favorite spot. The winner, "Abduction," aired on the day of the Super Bowl and received consumer accolades.

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10 Hard Truths Every CMO Must Confront to Lead Fearlessly

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» NOTABLE

- Following the \$6.2 million sale of Italian artist Maurizio Cattelan's concept art called "**Comedian**"—a banana duct-taped to a wall by Justin Sun, founder of cryptocurrency platform Tron—the following brands attempted to capitalize on the phenomenon with their own, adapted version of the auction: e.l.f. Cosmetics, Savannah Bananas, Walmart, Cheetos, Liquid Death, Rxbar, and Mailchimp.
- **Still G.I.N.** collaborated with the agency Rosewood Creative and the entertainment-focused generative AI company Metaphysic to create a 30-second AI-generated spot featuring Frank Sinatra, Sammy David, Snoop Dogg, and Dr. Dre.
- Furniture retailer **IKEA Portugal's** new campaign from agency Uzina says the retailer's furniture lasts longer than most relationships as it celebrates its 20th anniversary in the country. During consumer outreach, the brand heard that their furniture had outlasted some romantic relationships, leading to this campaign idea. "Do these relationships last because furniture is less complicated than people? Or is it simply because it's built to last? Probably both."
- Per Ad Age, **BBH Singapore** developed what it claims is the country's first legal "gum," called Unthinkables, developed in partnership with BBH's in-house Innovation Lab and Oni Cupcakes. It contains no gum base, making it legally permissible while offering the full gum-chewing experience without the risk of a fine (chewing gum has been illegal in Singapore since 1992). The campaign features fun headlines such as "A fine time. Without getting fined" and "Sticks to the law. Not your shoe."

Industry stats, trends, & projections

» GAME CHANGING

- Per the ANA's **The CMO's Playbook for Marketing Technology**, key success metrics to build a measurement framework for campaign performance and marketing value: marketing ROI, campaign performance, customer acquisition cost, customer lifetime value, time to insight, data accuracy, real-time data capture. 50% of CMOs placed solutions that help measure performance and demonstrate ROI in their top three most critical capabilities needed to achieve their 2025 marketing goals.
- Per Cortex Media, **four key reasons why benchmarking matters in media auditing**, even for biddable and programmatic:
 1. Helps set savings goals and KPIs (benchmarking highlights inefficiencies, enabling advertisers to course correct)
 2. Optimizes media strategies (benchmarking isn't just about cost—it informs smarter allocation)
 3. Enhances transparency and accountability
 4. Increases ROI (sometimes higher-priced strategies don't deliver higher value)

Per the firm, benchmarks are "not just insight, but also actionable leverage to challenge costs, optimize strategies, and drive lasting value."

- Per **Emplifi, marketers plan to invest heavily in AI, influencer marketing, and social**. 82% of marketers say AI improves productivity and want to implement AI in marketing workflows. Top areas of future investments are predictive analytics and insights (30%), automated content creation (28%), and AI ad targeting (26%). 67% plan to increase influencer budgets in 2026. 82% see user-generated content as critical, but only 31% actively scale it. 73% say short-form video is the #1 content type.

» HIGH IMPACT

- Per Advertising Production Resources, the **four biggest challenges affecting production budgets**:
 1. No standardization = Moving targets and skyrocketing budgets
 2. Missing guidelines = Tension over change orders and invoice mismatches
 3. Data paralysis = Stuck justifying decisions instead of making them
 4. Integration issues = Siloed experiences lacking brand synergy
- **ANA Aquila**, a subsidiary of the Association of National Advertisers, announced its successful launch of a consumer calibration panel with more than 1,000 homes (expanding to nearly 5,000 by year-end) in partnership with Kantar Media and Accenture Technology. Its mission is to deliver transparent, privacy-first, and de-duplicated measurements across all media platforms while eliminating \$50 billion in waste from excess ad frequency and enhancing brand media productivity and the consumer ad experience.
- Per Kantar BrandZ's **top 10 insights about marketing challenges**:
 1. Brand is a company's most valuable asset
 2. Disruption creates the most value
 3. Trust is an outcome of experience and crucial to retention
 4. Consumer perceptions are fluid, built from ongoing exposures and experiences
 5. Meaningful difference is the growth driver of brand value
 6. More consumers than ever are engaged by sustainability
 7. Driving perception ahead of share gives brands a growth advantage
 8. Salience alone is not enough,
 9. Pricing power enhances a brand's financial performance
 10. Consistency maximizes growth potential
- Per the ANA's "**The CMO's Playbook for Marketing Technology**," seven actions CMOs should take to improve measurement:
 1. Conduct a full audit of current measurement capabilities
 2. Create a standardized global measurement taxonomy
 3. Unify your customer data and make it accessible
 4. Test AI and machine learning tools
 5. Train your marketing and analytics teams
 6. Establish a test-and-learn culture
 7. Invest in long-term measurement infrastructure



- The Unstereotype Alliance secretariat at UN Women, with Saïd Business School at University of Oxford, a global ally of the Unstereotype Alliance, issued “**The Business Case for Inclusive Advertising**” report. Per the study, brands with more inclusive advertising practices sell more (3.46% higher shorter-term sales and 16.26% higher longer-term sales), are considered and trialed more (33% higher strong consideration, 62% higher likelihood of being a consumer’s first choice, and 8% higher incidence of being trialed), enjoy higher customer loyalty (23% lower chance of being abandoned after trial and 15% higher loyalty), are valued greater by consumers (54% higher pricing power), and have higher brand equity (8.3% more meaningful, 12.1% more different, and 9.4% higher salience).
 - Per **Dentsu**, in a report titled “**Unlocking AI-Enabled Experiences**,” four major themes emerging from Adobe Summit 2025:
 1. Becoming an AI-enabled business experience
 2. Modernizing the content supply chain
 3. Thriving in the data-fueled commerce and loyalty space
 4. Transforming B2B experiences
 - The ANA released its updated “**Better Creative Briefs for Better Brand Building**” white paper aimed at improving the creative brief so it can act as a road map and catalyst for creative teams. Key message: Creative briefs remain critically important, and we are still a long way from routinely achieving greatness.
 - Per **Interbrand**, brands that prioritize creativity saw EBIT (+2.7%) and market capitalization (4.7%) grow faster than a baseline average. High-awareness brands (60% awareness or more) are 3X more likely to convert a customer on TikTok than low-awareness brands (20% awareness or less).
 - Per ECI, **10 retail media investment strategies in 2026 and beyond**:
 1. Increased investment in retail media means careful allocation decision-making
 2. Retail media is evolving into a full-funnel channel, so investment needs to reflect objectives
 3. Advertisers must consider which formats will drive attention while minimizing waste
 4. In-store digital inventory presents the opportunity to invest in online and physical environments
 5. The integration of onsite and offsite strategies is essential and highlights the need for data ownership
 6. Amazon’s US dominance contrasts with Europe’s more fragmented landscape
 7. Advertisers should ensure they apply normal quality standards
 8. A KPI framework combining media and business KPIs is crucial
 9. Measurement standards are still catching up
 10. Transparency and trust must be prioritized
 - Per Ramzi Chaabane, director, marketing indirect procurement, advocacy, influencer and PR agency partnerships at L’Oréal, **key procurement responsibilities** moved from “cost control to strategic architecture,” including:
 1. Negotiate for ecosystem expertise (ensuring agency partners are truly equipped to design for the new, closed-loop AI environments)
 2. Redefine value (moving beyond the simple cost-per-click model to frameworks that can genuinely measure platform-native performance)
 3. Anticipate hidden costs (such as the constant content iteration within AI systems; licensing fees; and even the compliance risks that arise when platforms mediate the consumer relationship)
 4. Updating MSA and new contracts (accounting for the increasingly blurred lines between what the agency produces, what the platform automates, and how brand performance is ultimately achieved)
 - Per the **WFA’s Effective Influencer Marketing Report**, influencer marketing is now mainstream, with an average of 8.35% of total ad spend, and with more than half of brands expecting budget increases. However, only 25% can confidently link campaigns to sales.
 - The **ANA** released its **The Impact of Culture on Brand Building** report, redefining “culture as the ‘operating system’ of human behavior.” 88% of brands claim it’s very important or important for brands to engage in culture, but only 44% report that their companies often do so.
 - **Kantar** released its **2026 Marketing Trends** report. The key 10 trends:
 1. Agents of change: from attention to intention
 2. Brand building with AI: human connection through machine selection
 3. Synthetic data, augmented audiences
 4. Transform creative optimization into creative intelligence with AI
 5. Treatonomics: enjoying every day
 6. Experiment to accelerate: innovation as an engine for growth
 7. Brands at the crossroads: authentic inclusion drives growth
 8. Unlocking retail’s media potential: growth through collaboration
 9. Creators need to earn their place at the marketing effectiveness table
 10. Micro-communities become a major force in social media marketing
- Per the report, brands that disrupted themselves or their category created \$6.6 trillion of incremental value in the last 20 years.



» NOTABLE

- Per Ashley Yetman, co-CEO and director of brand strategy at Baldwin&, five ways to **streamline the agency strategy process**:
 1. Focus on translation, not research
 2. Onboarding and creative should happen in sync
 3. Offer a deliverable as quickly as possible
 4. Create trust by trimming the fat
 5. Research can always be added if there are real knowledge gaps
- Per Sprout Social, the social media management and analytics provider, Tubi was the **most-talked-about brand on social media** during Super Bowl LIX, generating 107,500 mentions and 1.5 million engagements. Doritos' fan-created "Abduction" ad came in as the No. 2 most-talked-about ad on social media, with 19,886 mentions and 58,254 engagements.

- Per Kantar BrandZ's **2025 Most Valuable Global Brands**, the top 10 are:
 1. Apple
 2. Google
 3. Microsoft
 4. Amazon
 5. Nvidia
 6. Facebook
 7. Instagram
 8. McDonald's
 9. Oracle
 10. Visa
- **Apple** is the World's Most Valuable Brand at \$1.3 trillion. The top 100 features 13 newcomers and reentrants: ChatGPT (#60), Spotify (#76), Meituan (#80), Stripe (#85), Chipotle (#86), Book.com (#89), Morgan Stanley (#90), Agricultural Bank of China (#93), Hilton (#95), Xiaomi (#96), Uniqlo (#97), Adidas (#98), and DoorDash (#99).
- Advertising Production Resources released its "**2025 Production Reimagined: Creative Production Trends**," a comprehensive report exploring how advancements in AI, the rise of influencer content, and evolving agency models are reshaping marketing production strategies.

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Is your organization ready for a transformative year of client-agency partnerships?

AI

Scan here to read:

Scan the code or visit agencymania.com/the-marketing-procurement-renaissance to read the article "The Marketing Procurement Renaissance: Redefining Value and Innovation in a New Era of Relationship Capital," featured on Forbes.com. Agency Mania Solutions' Co-Founder and Principal, Bruno Galpois, shares key insights from the 2024 ProcureCon Marketing event, highlighting top takeaways from engaging discussions and expert speakers!



- Per The Drum, takeaways from the **2025 Upfronts**:
 1. Live is the new on-demand
 2. Adtech is a big focus
 3. There is a split among streamers about their approach to content density
 4. Creators are the new media networks, as culture, creators, and commerce converge
- Per Mercer Island Group (Steve Boehler), **The Better Clients Get Better Work Checklist**:
 1. Frame the journey: Have clear goals and strategy for the business and vision for the brand
 2. Brief better: Brief the agency (in writing and meetings) thoroughly
 3. Train: Make sure your teams know how to evaluate the work and give effective feedback
 4. Create proxies: Decision makers can't be in every meeting, but consistent feedback and guidance is essential to an agency's success
 5. Root for the agency's margin and profitability: The best agencies get paid the most, just like the best performers in most industries
 6. Create deep relationships: Top-to-top calls; constant and effective communication; break bread; get to know the people as people
 7. Painless approval processes: The approval process should be built around what is possible for the agency to deliver great work and the least number of meetings possible that can interrupt good progress
 8. Ensure SOW fidelity: Do not ask for out-of-SOW work without addressing the agency's compensation
 9. Be realistic: Be realistic about your goals and budget
- Per Cella, the **art of effective creative feedback** consists of:
 1. Straight talk
 2. Do: Inspire the team by:
 - Setting the brief as the foundation
 - Defining the problem clearly
 - Encouraging exploration
 3. Don't: Fall into verbal traps by:
 - Not prescribing solutions
 - Criticizing without clarifying
 - Micromanaging

Business & digital transformation

» HIGH IMPACT

- **Nielsen** joined forces with TikTok to allow advertisers and agencies to compare ad performance on the platform across all screens, including digital, connected TV and linear TV. The collaboration allows the integration of TikTok's clean room technology and Nielsen's panels and data assets to provide independent reporting of demographic data in Nielsen One.
- **Beiersdorf** partnered with AI-powered tech company CreativeX to analyze how its creative is performing on social, then optimize accordingly. CreativeX initially ran more than 100,000 in-flight tests across Google, Facebook, and Instagram for its Nivea brand and is now testing all of its social media campaigns while extending its in-flight testing across TikTok and Pinterest. CreativeX determines brand compliance; the effectiveness of ads based on images, text, and video; and quality elements like sizing, optimal video length, and sound.



- **Svedka Vodka** has created the upcoming Super Bowl's first-ever fully generative AI commercial with its Fembot mascot (a sexy robot with human intellect), produced by Silverside AI (using Google's Nano Banana and Veo; Luma; ComfyUI workflows; trained specialized Lora models on Wan 2.2 and Flux); and The Shop, the in-house agency of Svedka parent Sazerac. In its second Super Bowl spot, the brand will feature actor and singer Victoria Justice, who will lead an online dance contest to be integrated into the Svedka Super Bowl commercial.

» NOTABLE

- International fast food restaurant chain **Wendy's** partnered with Snapchat to launch Sponsored Snap, an innovative new ad format serving full-screen video Snap directly to users' chat inboxes.



Other/miscellaneous

» GAME CHANGING

- The **Festival of Creativity** issued integrity standards and measures to ensure fair competition:
 1. Ownership and authorship (accountability, partnership, and permission)
 2. Veracity of claims (rigorous, two-tier fact-checking system, objective, independent expertise and support, AI integrity handbook)
 3. Consequence of misrepresentation (disqualification and withdrawal, sanctions for deliberate misconduct)
 4. Due process and independent oversight (independent integrity council and due process)
 5. Annual creative benchmark integrity audit

» HIGH IMPACT

- **AMC Networks** launched a new cross-portfolio performance measurement tool, AMCN Outcomes. It identifies the content in which an ad ran and the consumer segment it was shown to. Then, using AMC Networks' data clean room technology and category-specific datasets from its AMC's Audience+ platform, the ad exposure data is matched to business attribution partners.
- Per NBC News, a federal judge greenlit a lawsuit against Burger King after 19 customers in more than a dozen states sued the restaurant chain on claims of **false advertising**, highlighting the whopping differences in burgers advertised and served.
- Per the ANA, only 40 cents of every dollar spent on **programmatic media buy** goes toward working media (aka "effective CPM"), a 14% improvement in the last two years. The vast majority (59%) of programmatic spend (estimated at \$21.6 billion) still goes to overhead, including ad tech supplier transaction costs and made-for-advertising traffic expenditures.

» NOTABLE

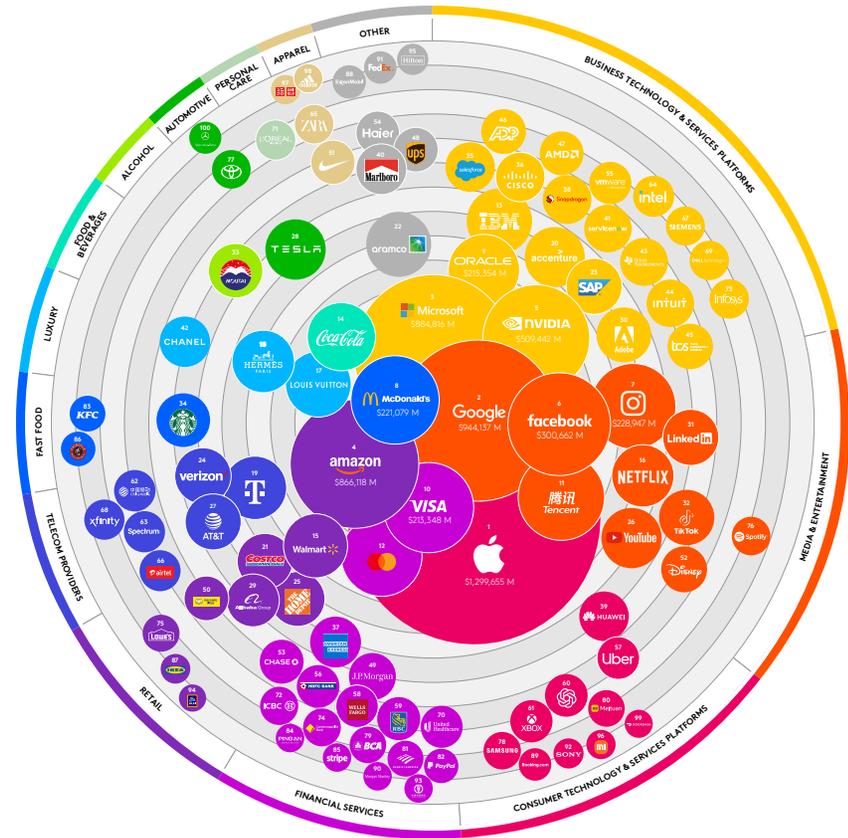
- Rise New York & Partners built an **AI jury** and trained it on 20 years of Cannes Lions winners and transcripts of jury discussions to determine the winner of the Lions Titanium Grand Prix from a list of 18 shortlisted campaigns. The AI jury picked Heineken's "Pub Succession," not AXA's "Three Words" by Publicis Conseil, the actual Titanium Grand Prix winner.



2025 Most Valuable Global Brands Contributed by: Kantar

| Brand Name | Value (US \$M) |
|---------------------|----------------|
| 1 Apple | 1,299,655 |
| 2 Google | 944,137 |
| 3 Microsoft | 884,816 |
| 4 Amazon | 866,118 |
| 5 Nvidia | 509,442 |
| 6 Facebook | 300,662 |
| 7 Instagram | 228,947 |
| 8 McDonald's | 221,079 |
| 9 Oracle | 215,354 |
| 10 Visa | 213,348 |
| 11 Tencent | 174,005 |
| 12 Mastercard | 167,882 |
| 13 IBM | 125,973 |
| 14 Coca-Cola | 119,979 |
| 15 Walmart | 119,580 |
| 16 Netflix | 115,271 |
| 17 Louis Vuitton | 111,938 |
| 18 Hermès | 109,421 |
| 19 Telekom/T-Mobile | 105,717 |
| 20 Accenture | 103,810 |
| 21 Costco | 100,809 |
| 22 Aramco | 93,554 |
| 23 SAP | 92,347 |
| 24 Verizon | 90,490 |
| 25 The Home Depot | 89,230 |
| 26 YouTube | 89,110 |
| 27 AT&T | 86,878 |
| 28 Tesla | 86,043 |
| 29 Alibaba | 81,208 |
| 30 Adobe | 80,759 |
| 31 LinkedIn | 76,636 |
| 32 TikTok | 75,669 |
| 33 Moutai | 74,446 |
| 34 Starbucks | 69,732 |
| 35 Salesforce | 69,503 |
| 36 Cisco | 68,268 |
| 37 American Express | 65,886 |

| Brand Name | Value (US \$M) |
|------------------------------|----------------|
| 38 Snapdragon | 65,632 |
| 39 Huawei | 64,657 |
| 40 Marlboro | 64,101 |
| 41 ServiceNow | 62,481 |
| 42 Chanel | 62,292 |
| 43 Texas Instruments | 59,863 |
| 44 Intuit | 59,009 |
| 45 Tata Consultancy Services | 57,333 |
| 46 ADP | 56,969 |
| 47 AMD | 56,629 |
| 48 UPS | 55,007 |
| 49 J.P. Morgan | 50,697 |
| 50 Mercado Libre | 49,846 |
| 51 Nike | 49,444 |
| 52 Disney | 48,665 |
| 53 Chase | 48,117 |
| 54 Haier | 47,578 |
| 55 VMware | 47,076 |
| 56 HDFC Bank | 44,959 |
| 57 Uber | 44,197 |
| 58 Wells Fargo | 44,196 |
| 59 RBC | 44,179 |
| 60 ChatGPT | 43,562 |
| 61 Xbox | 43,047 |
| 62 China Mobile | 41,299 |
| 63 Spectrum | 40,037 |
| 64 Intel | 37,390 |
| 65 Zara | 37,246 |
| 66 Airtel | 37,094 |
| 67 Siemens | 36,390 |
| 68 Xfinity | 36,069 |
| 69 Dell Technologies | 35,446 |
| 70 United Healthcare | 35,238 |
| 71 L'Oréal Paris | 35,090 |
| 72 ICBC | 33,915 |



| Brand Name | Value (US \$M) |
|--------------------|----------------|
| 73 Infosys | 33,096 |
| 74 CommBank | 32,093 |
| 75 Lowe's | 30,859 |
| 76 Spotify | 29,687 |
| 77 Toyota | 29,329 |
| 78 Samsung | 29,253 |
| 79 BCA | 28,749 |
| 80 Meituan | 27,925 |
| 81 Bank of America | 27,524 |
| 82 PayPal | 27,228 |
| 83 KFC | 26,875 |
| 84 Ping An | 26,326 |
| 85 Stripe | 26,127 |
| 86 Chipotle | 26,125 |
| 87 IKEA | 25,673 |

| Brand Name | Value (US \$M) |
|-------------------------------|----------------|
| 88 ExxonMobil | 25,544 |
| 89 Booking.com | 25,060 |
| 90 Morgan Stanley | 24,784 |
| 91 FedEx | 23,978 |
| 92 Sony | 23,858 |
| 93 Agricultural Bank of China | 23,550 |
| 94 Aldi | 23,386 |
| 95 Hilton | 23,000 |
| 96 Xiaomi | 21,917 |
| 97 Uniqlo | 21,599 |
| 98 Adidas | 21,067 |
| 99 DoorDash | 20,880 |
| 100 Mercedes-Benz | 20,815 |





Noteworthy quotes

- » “I still strongly believe in creativity, but you want to be informed by the data, and then you want to validate success by the data.” —Jim Mollica, CMO, **Bose**
- » “Creativity isn’t a luxury. It’s a growth strategy.” —Erik Wahl, **Artist, Author, Speaker, and Entrepreneur**
- » “In the age of AI, the loudest voices will not win. The clearest thinking will.” —Javier Rodriguez Horta, Marketing Strategy Senior Consultant, **Overline**
- » “Great advertising ideas do not wear out. It’s the discipline of incompetent marketers that wears out.” —Bob Hoffman, Chief Aggravation Officer, **Type A Group**
- » “These days, the way to distinguish yourself is letting clients know you speak their language, are ready to dive into a holistic and strategyembedded creative process, and want to work as nimbly as possible to deliver them great ideas.” —Ashley Yetman, Co-CEO and Director of Brand Strategy, **Baldwin&**
- » “Consumers want clarity and simplicity. Marketers want to complicate the shit out of everything.” —Bob Hoffman, Chief Aggravation Officer, **Type A Group**
- » “AI agents will create a zero moment of truth. They will create value for people, and people need to learn to work with those AI agents as part of the team.” —Maddie Bell, CEO, **SchedulerAI**
- » “AI is now allowing us to be able to create concepts and also ideas more quickly by putting in the right prompts in a structure to be able to come up with more ideas and then iterate on those much faster.... The next frontier will be doing that with visuals and advertising. So it’s a tool to achieve outcomes faster and better and more efficiently for higher degrees of effectiveness and value creation.” —Marc Pritchard, Chief Brand Officer, **Procter & Gamble**
- » “We can pursue high ROI initiatives while also being culturally relevant and innovative. Balancing these aspects is key to successful marketing today.” —Todd Kaplan, CMO, **Kraft Heinz**
- » “Agencies are paid for man-hours associated with the work they do. The fact that the work is creative does not mean it cannot be documented or measured.” —Michael Farmer, CEO, **Farmer & Co.**
- » “Always make sure you’re telling clients something they don’t already know.” —Jessica Buch, Head of Strategy, **Grey Germany**
- » “You’ve got to create an atmosphere of fearlessness, and the sense that there is no wrong answer, but there are just some that are better than others.” —Sir John Hegarty, Co-Founder and Creative Director, **The Business of Creativity**
- » “Agencies help us see the world in a way that we can’t by ourselves.” —Steve Boehler, Founder, **Mercer Island Group**
- » “There’s been an industry shift away from heavy emotional narratives, embracing pure, unapologetic fun instead. And it’s no wonder—in a world full of constant seriousness, people are craving laughter.” —Jason Apaliski, CCO, **Pereira O’Dell**
- » “Brands that lean into the moment, with a bold message and an invitation for people to join in, will be the big winners.” —Cooper Lemon, Communications Strategy Director, **Johannes Leonardo**
- » “Clients are tired of bureaucracy and bloated hierarchies—they want direct access to creative and strategic leaders who understand their challenges and can act quickly.” —Jared Kozel, Founder and CCO, **Super Nice**
- » “The success of a collaborative model should be measured not just in creative output, but in speed to market, reduction in revision rounds, and ability to respond quickly to changing market conditions.” —Rafael Caldeira, Founder and CCO, **404 Design & Innovation**
- » “In a world where evolving technology is optimizing to sameness, the best marketers recognize that novel, disruptive creativity is more valuable than ever.” —Erin Riley, Global CEO, **TBWA**
- » “We originate ideas. We solve problems through creativity.” —Anthony Yell, CCO, **Razorfish**
- » “Social distribution will be the entertainment networks of the future. Brands just have to get smarter to cut through the ever-growing volume of noise.” —Claudia Ratterman, Director Digital Marketing, **Gartner**
- » “Agree to one-line briefs with clients, with the understanding that an idea that solves that specific problem, or reinforces that compelling point of differentiation, will always be welcome. This will enable a constant stream of fresh, relevant ideas outside of the formal client/agency briefing process, but through an agreed-upon creative problem to solve.” —Steven Panariello, CEO, **BBH USA**
- » “You’ll have this mainstream kind of creativity based on the things that we know. And it will be effective because it pulls the triggers that get emotions going, or rational minds going. But the ones that are really going to stand out, they’ll break the pattern.” —Frank Cooper III, CMO, **Visa**
- » “Our job in marketing and advertising isn’t to create assets. Our job is to use our creativity, instinct, knowledge and taste to solve business problems in a way that connects with other human beings.” —Greg Hahn, Co-Founder and Chief Creative Officer, **Mischief @ No Fixed Address**
- » “The future belongs to the marketers who question convention—and to the agencies nimble enough to meet them there.” —Dana Hork, Founder and CEO, **Beers With Friends**
- » “We’re moving into a world with fewer agencies and more agents.” —Henry Cowling, Chief Innovation Officer, **Monks**



- » “2025 production guidelines that don’t include AI language aligned with their corporate policy is a big miss.” —Russell Sharpe, Head of Production, **APR**
- » “There is no monetary system, no system of value exchange that has ever worked in the history of mankind without trust.” —Frank Cooper III, CMO, **Visa**
- » “Creativity is the new productivity.” —Shantanu Narayen, Chair and CEO, **Adobe**
- » “Agility is the key. There are areas where the world stage is changing, and it’s our responsibility to stay on top of that and ahead of it.” —Emily Ketchen, Senior VP, CMO for Intelligent Devices Group and International Markets, **Lenovo**
- » “In a TUNA world—Turbulent, Uncertain, Novel, and Ambiguous—marketers face pressure to deliver immediate savings. Yet evidence shows that short-term thinking can compromise long-term brand equity.” —Stephan Loerke, CEO, **WFA**
- » “Any relationship takes work, and a client-agency one is no exception. The best relationships are the ones worth working for, and if you do the work on yourself and together, your work will only get better for it.” —Ben Prout, Senior Director and Global Head of Creative, **EA Sports**
- » “Human touch is our superpower.” —Tor Myhren, VP Marketing Communications, **Apple**
- » “We’ve moved away from those six-month, back-and-forth nightmares. Now it’s one to three meetings, done. Agencies want that. And we’re becoming a desirable client again.” —Luiz Sanches, Global Chief Creative and Design, **Kimberly-Clark**
- » “If you want to build a brand that people love, stop dictating to culture. Let culture dictate to you.” —Alemu Emuron, Chief Creative Officer, **The Quollective Africa**
- » “AI isn’t just reshaping creative development, it’s redefining how we measure, optimize, and prove the value of creativity.” —Manjiry Tamhane, Global CEO, **Gain Theory**
- » “An excellent brief remains the top contributor to effective creative work, and great creative, in turn, contributes to brand and business growth.” —Bob Liodice, CEO, **ANA**
- » “True creativity lives in the rough edges, the weird metaphors, the unexpected connections—the same stuff that gets smoothed away in the name of clarity and professionalism. When we optimize for being understood by everyone, we risk saying nothing that matters to anyone.” —Margaret Johnson, Chief Creative Officer, **Goodby Silverstein & Partners**
- » “No client wants to be a bad partner, but no villain in history has ever believed they were bad either.” —Ben Prout, Senior Director and Global Head of Creative, **EA Sports**

- » “We live by a simple motto: Be hard on the work, kind to the people. Friction is part of that process.” —Dominic Goldman, Founder and Chief Creative Officer, **You’re The Goods**
- » “The demands or expectations of clients are for more integration, more converged thinking, [and] more speed.” —Justin Thomas-Copeland, CEO, **4As**
- » “If agencies are moving upstream, procurement absolutely must move alongside them, fostering creativity rather than commoditizing it.” —Ramzi Chaabane, Director, Marketing Indirect Procurement, Advocacy, Influencer and PR Agency Partnerships, **L’Oréal**
- » “AI doesn’t have imagination. You do.” —Sir John Hegarty, Co-Founder and Creative Director, **The Business of Creativity**
- » “AI will do this work faster, cheaper and better than humans. Once the busywork is out of the picture, we’re free to focus on what we actually love doing—crafting: Big ideas, bold storytelling and meaningful brand building.” —Margaret McGovern, Executive Creative Director, **Boathouse Group**
- » “As the world redefines how ideas are brought to life, the brands that will win will be those that combine relevance, creativity, and scale—without compromise.” —Lara Balazs, CMO and EVP Global Marketing, **Adobe**
- » “Conflict is usually just fear in disguise. When you meet it head-on, it does not break the relationship. It builds trust and proves you have your client’s back, even when they are uncomfortable.” —Lauren Shakil, Director of Accounts, **Bald Agency**
- » “Scopes of work are designed to achieve low costs in media (via digital/social and programmatic) and low costs for creative outputs (adaptations involving ad banners, email marketing, search, online videos, etc.) rather than higher brand growth rates.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “Shrinking margins from cost-cutting, competition from insourcing and consultancies, multiple client stakeholders, and tech-partner disintermediation pushed agencies to consolidate capabilities and include technology as part of their offerings.” —Jay Pattisall, VP and Principal Analyst, **Forrester**
- » “Creative agencies must stop selling deliverables and start building engines.” —Craig Elimeliah, CCO, **Code and Theory**
- » “A good brief doesn’t guarantee good creative—but it dramatically improves your odds.” —Andrea B. Ruskin, Partner and Co-Founder, **Blum Consulting Partners**
- » “The boundaries between media, content and commerce are dissolving, and the question is no longer whether media should evolve, but how quickly and decisively.” —Jack Shearring, Head of Transformation, **mediasense**



Financials:

Driving efficient use
of resources







FINANCIALS: Driving efficient use of resources

Year-end summary

January-February 2025 | Volume 80

The global advertising industry is poised for significant growth, with GroupM projecting it will surpass \$1 trillion in revenue in 2025. US ad revenue was expected to climb by 9% in 2024 and is forecast to grow by 7% in 2025, excluding political ads. Retainer zero-based budgeting (or RZBB) may be a necessity for marketing leaders looking to realign their agency investment to their business priorities, avoiding the danger of simply using past budget assumptions to inform future ones. Major mergers include Omnicom's \$13–\$14 billion acquisition of Interpublic Group, projected to deliver \$750 million in annual cost savings.

Key trends are declining creative agency service prices and increasing demand for transparency in agency remuneration, as highlighted by the WFA and mediasense. Black Friday online sales hit a record \$10.8 billion. Netflix's advertising revenue is forecast to reach \$3.2 billion in 2025. Notable M&A activity includes Kantar Media's \$1 billion sale to a private equity firm and WPP's acquisition of T&Pm.

March-April 2025 | Volume 81

Over the past decade, major mergers and acquisitions have reshaped the advertising industry, with Publicis, WPP, Omnicom, and Dentsu leading significant deals. Foremost currently is Omnicom and Interpublic Group's proposed merger, expected to generate \$750 million in cost savings through job cuts and operational consolidation. The FTC has launched an antitrust investigation into the merger.

Meanwhile, Amazon's advertising revenue surged to a \$69 billion annual run rate in Q4 2024, while Netflix's ad revenue is projected to double to \$4 billion in 2025. Google introduced Meridian, a free marketing mix modeling tool. M&A activity continued with Stagwell, Publicis, and others acquiring agencies to expand their global presence. Financially, Publicis reported strong organic growth (5.8% in 2024), Omnicom grew 5.2% organically, and IPG reported a slight revenue decline (-1.8% organic growth in Q4). IPG and Omnicom each announced restructuring plans, with IPG expecting organic revenue to decline by 1% to 2% in 2025.

May-June 2025 | Volume 82

We've unmistakably entered a period of heightened market volatility, shaped in large part by tariff-related tensions between the United States and global trading partners.

The geopolitical friction has cast a long shadow over economic forecasts, injecting a new layer of uncertainty into an already complex landscape. Budgets are strained as the economy remains volatile with rising costs, including tariffs. For holding companies, this demands caution as well as strategic discipline—it is imperative to reexamine cost structures, preserve operational agility, and anticipate shifting client needs.

Agencies across the board are actively evaluating how these broader macroeconomic forces—from trade policy shifts to inflationary pressures to tightening consumer spending—will ripple through the marketing ecosystem. The key concern isn't just immediate disruption, but how these dynamics may reshape demand patterns, budget allocations, and campaign strategies through the remainder of 2025.

As the year unfolds, adaptability, resilience, and a forward-looking mindset are essential to navigate headwinds and continue delivering value.

July-August 2025 | Volume 83

WPP had a very challenging first half given pressure on client spending and a slower new business environment. WPP reduced its outlook for 2025 midyear (to 4.8%), citing disruptions to global trade and continued de-globalization pressure.

Others are faring better amid ongoing macroeconomic and geopolitical uncertainty: Omnicom reported 3% organic growth and \$4 billion in revenue. COMvergence assessed \$9 billion in media spending from concluded media pitches, indicating that an additional \$11 billion is still in play. Publicis won Mars' \$1.7 billion global Media business, another blow to incumbent WPP (the company's third major account loss in recent months).

AI is expected to significantly reduce the time and labor required for creative work, requiring agencies to rethink compensation. Many agencies are bringing up new ways of being compensated (that do not involve their time) such as AI-as-a-Service (AIaaS, like SaaS) solutions.

September-October 2025 | Volume 84

Global advertising is entering a new era of accelerated growth and transformation. WARC projects ad spending to surge 7.4% in 2025, reaching \$1.17 trillion, powered by digital-first platforms and social media. Alphabet, Amazon, and Meta are expected to command over half of all global spend—cementing their dominance outside China. Despite growth, inflationary pressures persist: The World Federation of Advertisers reports global media costs are rising by 4.3% in 2025, an inflation rate that is expected to hold steady in 2026. Alphabet’s record \$102.3 billion in quarterly revenue underscores the AI revolution reshaping the industry, with 70% of Google Cloud clients now using its AI tools. Meta’s ad business grew 26%, driven by 3 billion Instagram users and major AI infrastructure investments exceeding \$70 billion.

Agency models are also evolving. The 4As revealed a shift away from hourly and cost-plus compensation toward deliverables and outcome-based models, echoed by JFE International Consultants’s call to “anchor pricing to impact.” M&A activity surged, led by Publicis’s \$6.3 billion new-business haul and landmark deals, including Horizon Media Holdings and Havas forming Horizon Global, featuring their united platform, BluConverged; R/GA’s Alnative Addition acquisition; and the merger of Empower Media and Ocean Media.

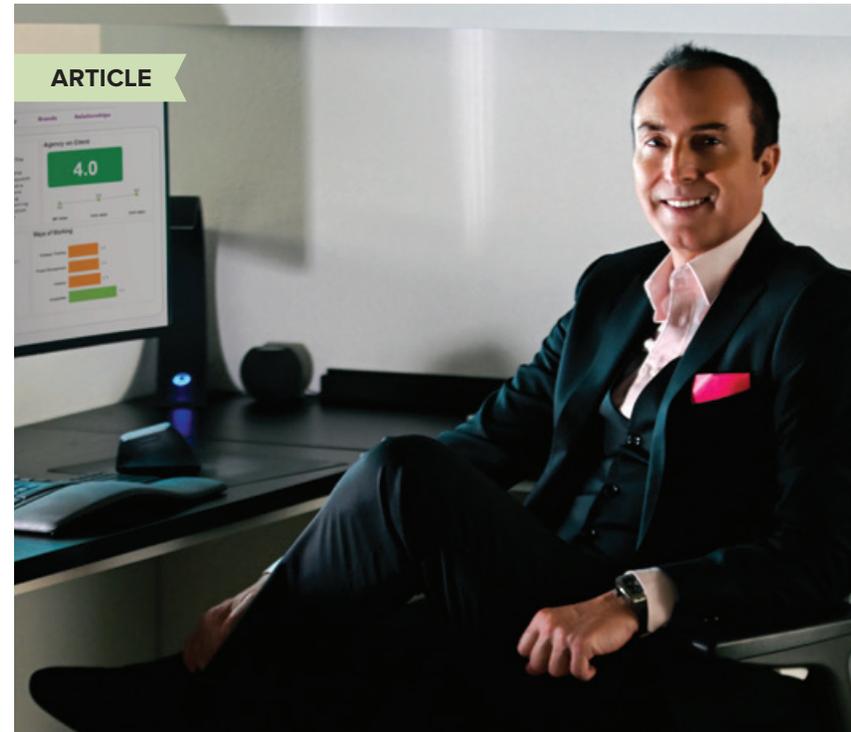
November-December 2025 | Volume 85

Adobe announced that shoppers in the US spent a record-shattering \$44.2 billion online during the five-day stretch following Thanksgiving. WPP is set to exit the FTSE 100 after more than 25 years as its shares reached their lowest level since 1998. The drop follows a sharp decline in WPP’s market value, which fell to 117th among UK-listed companies, below the FTSE 100’s eligibility threshold.

Meanwhile, global advertising is entering a new era of scale, scrutiny, and structural reinvention. Forecasts show the industry breaking the \$1 trillion barrier in 2026 with 5.1% growth, outpacing global GDP and fueled by major global events, surging digital investment, and the continued rise of algorithm-driven media, which will exceed 70% of all spend. Retail media, online video, and social remain the engines of momentum, while tech—powered by relentless AI innovation—emerges as the fastest-growing sector. Marketers and advertisers are spending more: The world’s top advertisers boosted 2024 investment by 6.6%, with Amazon once again dominating at over \$21 billion.

Yet beneath this growth lies mounting tension. Compensation models are outdated, performance incentives are fading, agencies face cash-flow strain and unpaid scope creep, and the industry confronts inflation variability across regions and channels. Regulatory and ethical concerns intensify as lawsuits challenge media practices and holding-company accounting comes under fire. Meanwhile, M&A is reshaping the landscape—from Netflix’s pending landmark acquisition of Warner Bros. to strategic deals by Havas, Bond, Wpromote, and Adobe that fuse data, creativity, and AI at unprecedented scale.

Across every corner of the ecosystem, one truth rings clear: The future belongs to those who master AI, measure what matters, and rebuild commercial models for a world accelerating faster than ever. Growth is rising, rules are shifting, and the leaders will be those bold enough to rewrite the playbook.



MARKETING PROCUREMENT

All change please: There’s a new model in agency land

By Morag Cuddeford-Jones

AI isn’t why the agency model is evolving. It’s just a catalyst for change that has been needed for years and is finally showing its true value to marketing procurement.

But for those who don’t evolve there’s danger ahead, argues Agency Mania’s Co-Founder and Principal, Bruno Galpois.

Want to read more?



Scan this code or visit mxpiq.com/all-change-please-theres-a-new-model-in-agency-land to check out Bruno Galpois’s interview by Morag Cuddeford-Jones and Marketing Procurement iQ about the state of our industry and AI.



Industry stats & projections

Worldwide advertising

» GAME CHANGING

- **WPP Media** downgraded its global ad expenditure growth forecast for the full year to 6% (compared with 7.7% estimate last year), for total global ad revenue of \$1.08 trillion for 2025, citing “disruptions to global trade and continued deglobalization pressures weighing on advertising investment,” which translates into increased supply-chain issues and curtailed business investment. The firm predicts 6.1% growth in 2026. US advertising is forecast to increase 5.6%, to \$404.7 billion. Digital advertising continues to dominate, accounting for 81.6% of all ads, including digital extensions such as streaming TV, digital out-of-home, and digital print. Pure-play digital is expected to account for 73.2% of advertising in 2025. Retail media remains one of the fastest-growing segments and is expected to reach \$169.6 billion this year. WPP Media updated its ad spend outlook midyear, reducing US growth to 2.2%. Excluding political ad spending comparisons, WPP estimates US ad spending will expand 5.4% this year, down from 6.5% forecast at the end of 2024. The Big 3 holding company forecast consensus for US ad growth this year has now fallen to 3.8%. Expectations for 2026 are for 6.4% growth.

» HIGH IMPACT

- WPP’s **GroupM** predicted that the global ad industry would surpass \$1 trillion in total revenue for the first time, climbing by 7.7% in 2025 to hit \$1.1 trillion. Per the firm, US ad revenue was forecast to climb by 9% in 2024—excluding US political advertising—to \$379 billion and by 7% in 2025.
- Streaming giant **Netflix** is expected to reach \$3.2 billion in advertising revenue in 2025, fueled by growth in live sports and other events. The firm is forecast to double its advertising revenue, with 56% coming from North America.
- Per **COMvergence**, GroupM’s EssenceMediacom was the top-ranked top agency for 2023 global billings—estimated at \$24.5 billion (up 0.2% from the prior year)—followed by Omnicom Media Group’s OMD with an estimated \$24 billion, scoring the highest growth rate among the top 10 agency networks (8.7%). GroupM’s Mindshare placed third with \$21 billion (+6%). Omnicom Media Group (OMG) ranked as the #1 global media group for new business in the first nine months of 2023, fueled by a series of wins and retentions (Amazon, Volkswagen Group, Unilever, Priceline, HanesBrands, and HP), or \$7.37 billion in total new business (wins minus losses, including retentions)—representing 28% of all new business awarded during the first nine months of 2023—while also earning the highest retention rate (85%) in its category. OMG agency OMD Worldwide ranked #1 for total billings volume, with the highest rate and volume of growth among all global media networks; and PHD and Hearts & Science delivered growth across every region.
- Per **Gartner’s 2025 CMO Spend Survey**, marketing budgets remained at 7.7% of companies’ total revenue (vs. 10.5% in 2019). 39% of CMOs plan to cut back on agency budgets (vs. 34% last year), of which 60% said they intend to eliminate unproductive agency relationships to optimize the agency resources they retain.
- Per **mediasense’s R3**, Publicis Groupe is leading in number of accounts won by a holding company in global creative in Q1 2025, with \$110 million across 247 accounts (about \$500K on average per account), mostly led by Publicis agencies Digitas and Publicis Worldwide (now part of the creative network Leo). Publicis Groupe is followed by WPP, which leads in the US creative space. In media, Omnicom is leading in account wins by holding company in global media in Q1 with \$80 million across 176 accounts (also about \$500K on average per account), mostly led by PHD, OMD, and Hearts & Science. Omnicom is followed by Publicis Groupe.
- Per COMvergence, **media agencies in the US** accounted for a lion’s share (40%) of the \$263 billion in total media billings in 2024, followed by the top five European markets—UK, Germany, France, Spain, and Italy—which contribute 23%. China and India led APAC with a combined strength of 12%. Altogether, these eight key markets represented 75% of total billings in 48 countries.
- Per COMvergence, in 2024 the **top 1,000 global advertisers** had a total media spend of \$214 billion. WPP Media (formerly GroupM) retained the top position, with \$64.6 billion in global billings, followed by Publicis Media with \$54.7 billion and Omnicom Media Group at \$45.6 billion. These top three groups represent 71% of total billings among the Big 6 globally. At the agency level, OMD claimed the top position with total billings of \$26.3 billion, followed by EssenceMediacom with \$24.6 billion and Mindshare with \$21.9 billion.
- Per the **European Association of Communications Agencies (EACA)**, the average agency now spends more than €650,000 per year on pitching, with no guarantee of return, the equivalent of needing to win more than €7 million in new business annually just to break even. Agencies spend an average of more than €43,000 per pitch. Media agencies spend considerably more than creative agencies on pitching. Six out of 10 ideas are never implemented by the client. EACA warns agencies: “Don’t give away your best thinking for free.”
- Per WARC, **global ad spending** is expected to increase 7.4% to reach \$1.17 trillion in 2025, higher than originally forecast, fueled by digital-first ad platforms and social media spending. Alphabet, Amazon, and Meta continue to dominate. The trio is forecast to capture more than half (55.8%) of global ad spend expenditures, excluding China.
- Per the WFA, **global media costs** have risen half a point to an annual inflation rate of 4.3% for the ad industry in 2025. 2026 media cost inflation is expected to be 4.2%. In the US, media costs for advertisers rose half a point, to a 3.8% rate of inflation in 2025, and are forecast to rise to a 4% rate in 2026.



- Per Dentsu’s **Global Ad Spend Forecasts**, despite ongoing macroeconomic uncertainty, global advertising spend is forecast to rise by 5.1% in 2026, surpassing the \$1 trillion mark (\$1.04 trillion). While growth is expected to slow compared to 2025 (5.5%), it is projected to outpace global economic growth (3.1%), thanks to major events such as the Olympic Winter Games, FIFA World Cup, and midterm elections. Asia-Pacific (5.4% rate) is expected to remain the fastest-growing region in 2026 (compared with the Americas at 5.2%, and Europe, the Middle East and Africa at 4.2%). Algorithm-driven advertising is forecast to represent 71.6% of total spend in 2026, rising to more than three-quarters (76%) by 2028. Retail media is predicted to remain the fastest-growing digital channel, increasing by 14.1% in 2026, supported by first-party shopper data and closed-loop measurement. Within digital advertising (6.7%), both online video and social are projected to accelerate in 2026, reaching growth rates of 11.5% and 11.4%, respectively. Technology (10.3%), driven by AI-led product launches and innovation in connected ecosystems, is forecast to be the fastest growing sector in 2026. Global advertising spend is projected to increase by 5.1% in 2027 and 5.2% in 2028, reaching \$1.15 trillion.

» NOTABLE

- Per ECI Media Management’s Media Inflation Report, **global media prices** are expected to increase by 3.9% in 2025 compared to 4.3% last year and the year prior (4.4%).

US advertising

» GAME CHANGING

- Per the 4As and the S&P Global Marketing Intelligence about the **economic impact of advertising on the US economy**, ad spending stimulated \$10.4 trillion (ad spend + stimulated sales activity), representing 21.9% of total sales generated in the US economy in 2024. Advertising also supported 29 million jobs or 18.3% of the US workforce. In conclusion, for every dollar of ad spending stimulated, on average, over \$20 of follow-on sales activity was generated. The total impact of advertising represented 19.9% of US GDP.

» HIGH IMPACT

- On November 1, 2024, the IRS announced **cost of living adjustments** affecting the dollar limitations for retirement plans for 2025. COLA is calculated based on the increase in the Consumer Price Index (which tracks how the price of consumer goods and services changes over time) as determined by the US Department of Labor’s Bureau of Labor Statistics. In 2024, the Social Security COLA was 3.2%, and in 2023, at the height of pandemic-fueled inflation, it reached 8.7%. COLA is often a factor in conversations with agencies about labor rate adjustments.
- Per the Out Of Home Advertising Association of America, **out of home (OOH) advertising** revenue reached a record \$9.1+ billion in 2024, a 4.5% increase from 2023. Digital OOH accounted for 34% of total OOH ad spending and grew by 7.5% in 2024. Top advertisers were Apple, McDonald’s, Amazon, Coca-Cola, Verizon, Disney, Morgan & Morgan Attorneys, Hotels.com, Google, and Samsung.

- IPG Mediabrands-owned intelligence firm Magna lowered its prediction for **2025 US ad sales growth** to 4.3% from 4.9%, due to the changing economic landscape that may cause marketing and advertising budget freezes and cuts. Consultancy Madison and Wall lowered its forecast to 3.6%, excluding political advertising spend.
- Trump’s tariffs led experts to predict economic downturn marked by reduced consumer spending, along with brand advertisers creating contingency plans or stretching shrinking budgets. Per **Gartner**, brands allocated 22% of their marketing budgets toward agencies in 2024, the lowest in recent years.
- Per **COMvergence**, Omnicom’s OMD ranked #1 in terms of 2024 US media agency by billings with \$10.4 billion, up 8.4% YOY, followed by Spark Foundry (\$8.8 billion, up 15.8%), and independent Horizon Media (\$7.6 billion, down 5.9%). At the group level, Publicis Media was top ranked with \$27.6 billion, up 16%, followed by Omnicom Media Group (\$18.5 billion, up 12%), and WPP Media (\$16.6 billion, down 3.2%). The top 10 independent agencies accounted for 16% of total measured agency billings.
- Per Ad Age, the 50 **biggest US advertisers** increased advertising and marketing spending in 2024 by 7% to \$136 billion while the world’s top 50 advertisers boosted spending by 6.6% to \$291 billion. Median ad spending growth—the midpoint growth rate—for the top 50 US advertisers was 5.4% in 2024 while median ad spending growth for the world’s 50 largest advertisers was 3.2%. Amazon was the world’s biggest advertiser for the fourth consecutive year and the top US advertiser for the sixth year in a row, spending a record \$21.4 billion worldwide on advertising and promotion in 2024, up 5.4%, and an estimated \$14.1 billion in the US, up 5.7%. Retail was the biggest advertiser category in 2024, representing \$38.1 billion or 18% of total US measured-media spending, followed by finance and insurance (12%). Alibaba, Alphabet, Amazon, and PDD are among 10 internetcentric companies in the world’s top 50 ranking. Six of the world’s top 10 internet ventures—Alphabet, Amazon, Booking Holdings, Expedia Group, Flutter Entertainment, and Netflix—are based in the US. Of the top 50 US advertisers, 39 have headquarters in the US. The US is home to 26 of the world’s top 50 advertisers.

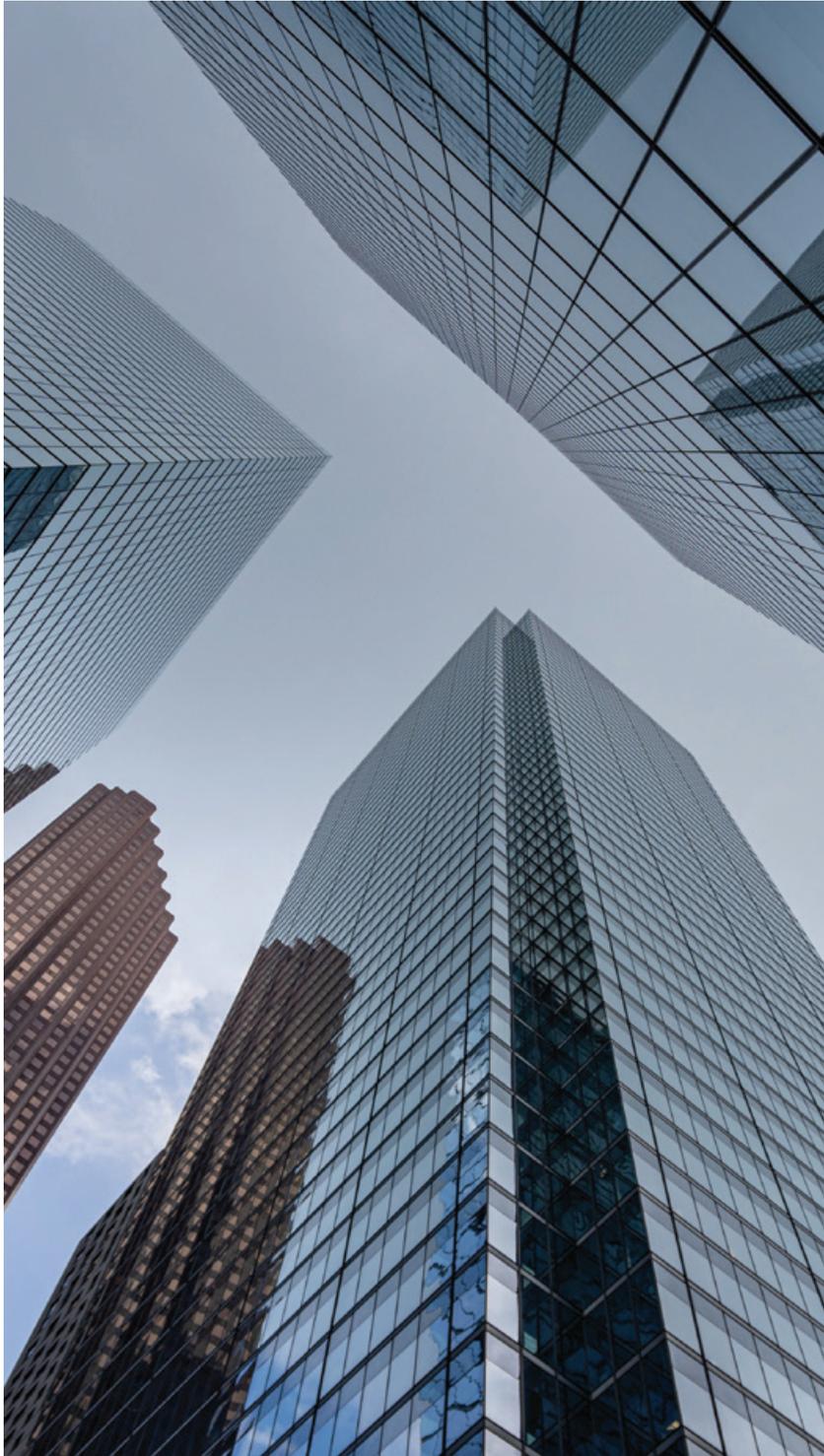
- Per the Ad Age Brand Report 2025, 12 brands had **US measured-media spending** (including paid media) of at least \$1 billion in 2024:

- | | |
|-------------------------------------|--------------------------------------|
| 1. Amazon (retail) | 7. Abbvie (pharmaceuticals) |
| 2. Progressive (financial services) | 8. Geico (financial services) |
| 3. Walmart (retail) | 9. Apple (technology) |
| 4. Allstate (financial services) | 10. Target (retail) |
| 5. Verizon (telecom) | 11. AT&T (telecom) |
| 6. T-Mobile (telecom) | 12. Capital One (financial services) |

Other brands in the top 20: State Farm, Home Depot, NerdWallet, Expedia, Disney, Temu, Chase, and Hotels.com.

» NOTABLE

- **Black Friday** set new records in 2024. Per Adobe Analytics, consumer spending reached a record \$10.8 billion online, up by 10.2% YOY. Between 10 a.m. and 2 p.m., \$11.3 million was spent online every minute. 55% of online sales were conducted with a mobile device.



Digital advertising

» GAME CHANGING

- Per the Interactive Advertising Bureau, **digital advertising** revenue grew by 15% to \$259 billion in 2024. Emerging versions of artificial intelligence became a catalyst for that growth. The IAB called AI “a transformative force.” Digital video overall became the fastest-growing format and now accounts for 24% of total ad revenue. Search advertising remained the industry’s largest segment, reaching \$102.9 billion and is now 39.8% of total ad revenue. Programmatic ad revenue grew by 18%, reaching \$134.8 billion. Digital video spend increased by 18% in 2024, reaching \$64 billion. In 2025, digital video now captures a 58% share of the TV/video ad spend and is expected to reach \$72 billion by yearend. Digital video advertising surpassed linear TV last year. CTV advertising will reach \$26.6 billion in 2025.

» HIGH IMPACT

- Per Emarketer, **influencer marketing spend** (defined as “revenues generated by US-based creators from payments made by brands to promote products on social media and video platforms that primarily host user-generated content—excluding paid media and nonsocial channels”) surpassed \$10 billion in the US in 2025.
- **Google** released **Meridian**, the company’s marketing mix modeling measurement system, for free, becoming available to all marketers and data scientists globally. Meridian is described as allowing marketers to uncover the true value of performance with more data, like impressions, clicks, and cost, as well as Google query volume. Google also launched a certified partner program with more than 20 measurement experts trained and certified to support advertisers in implementing Meridian.

» NOTABLE

- Per Bernstein Research, **Netflix global advertising revenue** will double to \$4 billion in 2025 (\$2.9 billion in the US and Canada). Total revenue per membership—advertising and subscription—for Netflix’s “Standard With Ads” plan is now \$18.72. For Netflix, the derived average US/Canada advertising revenue per member was an estimated \$10.22 in 2024—expected to increase to \$10.73 in 2025.
- Per **Gartner’s CMO Spend Survey Data Snapshots**, digital spend makes up 61% of the total marketing budget in 2025. Paid media is the largest share of budget (30.6%). Among paid media, top spend is search advertising (13.9%), followed by digital display advertising (12.5%), social advertising (12.2%), and video and streaming (10.7%). Among owned/earned media, top spend is SEO (8.9%), email marketing (7.4%), and influencer marketing (5.9%). Event marketing receives the most offline spend (19.3%). 39% of the CMOs who are planning reduced budgets are from agencies: Eliminate underperforming agency relationships, simplify agency roster/portfolio, and renegotiate contracts and SOWs.



Media, programmatic, & social

» HIGH IMPACT

- Per ECI Media Management, **media inflation** is expected to be at 2.4% in 2025 in the US, down from 3.4% in 2024. Global media inflation is forecast to be 3.9% in 2025, a modest decrease from 2024's 4.3%.
- Per Kantar's Media Reactions, 53% of marketers planned to invest more in **influencer content** in 2025. Per Forrester, 66% of B2C marketing decision-makers plan to invest more in creator/influencer marketing. For example, packaged goods giant **Unilever** announced that it moved to a social-first advertising model, increasing media spending on social channels from 30% to 50% of its budget and working with 20 times more influencers than it did previously.
- Per EMarketer, **influencer marketing spend** (defined as "revenues generated by US-based creators from payments made by brands to promote products on social media and video platforms that primarily host user-generated content, excluding paid media and nonsocial channels") is expected to surpass \$10 billion in 2025 in the US, up 23.7% this year alone. This is the result of brands directing more of their influencer budgets to paid social ads and nonsocial channels, from TV to digital out-of-home to podcasts.
- Per COMvergence, there were 590 **media account moves and retentions** in 47 countries totaling \$6.68 billion (the US representing 42% total spend), up 38% YOY. Independent agencies won or retained \$1.5 billion of the total (23%). A global consortium of independent agencies known as Local Planet was the top-ranked media agency network in global new business in Q1 2025, mainly due to Horizon Media securing the \$857 million US Charter/Spectrum cable company account, followed by Publicis Media's Spark Foundry (\$400 million Abbott Laboratories account win). At the holding company level, Publicis Media was top ranked with total new business of \$2.7 billion (including Coca-Cola North America media business, Barilla, Dropbox, Goodyear, LinkedIn, and Santander), followed by Omnicom Media Group and IPG's Mediabrands.
- Per eMarketer, **total social media users** in 2025 will grow 1.7% to 236.5 million, with adult users—who account for 90% of total users—up 1.9% to 212.8 million. Time spent on social media among adult users is forecast to hit its peak in 2025, at 1 hour 54 minutes per day, and is projected to go down to 1 hour 51 minutes by 2027.
- The ANA released its **Programmatic Transparency Benchmark: Q1 2025** findings. Per the study, the TrueCPM Index reveals a 37.8% optimization gap, indicating that over a third of open web ad spending still goes toward impressions that don't meet standard quality metrics. Using impression-level log data (LLD) to enable closed-loop optimization could reduce this gap by an estimated \$21.6 billion (20.8%) in a global programmatic market that has grown from \$88 billion in 2023 to \$104 billion in 2024.
- Per the **ANA**, global advertisers wasted \$26.8 billion on programmatic spend in Q2, a 34% increase from the \$20 billion tallied last year. The ANA released its new ANA Online Benchmark tool, available to its members and those of the Trustworthy Accountability Group. The tool is designed to enable them to spot inefficiencies, track progress, and make better investment decisions using the ANA TrueAdSpend Index and TrueCPM Index.

- Per the WFA, **global media inflation** is expected to stabilize at 4% in 2025 and 2026 (3% to 4% in the US, 3% in the UK, and 4% to 5% in Western Europe), mirroring the wider economy. Other key findings: Eastern Europe (11%) and India (9%) are seeing the steepest price growth, mostly due to rising audience value and domestic advertiser demand. Prices for connected TV are almost flat (1%), but broadcaster video-on-demand commands the strongest price inflation of any channel (about 5% per year). Linear TV inflation remains about 5%. Paid search, social video, and retail media are all inflating in line with the global average (4% to 5%).

The best way to protect yourself is to build a relationship with your agency where you can ask tough questions and know they are being transparent with you."

—Chris Koehler, CMO, Twilio



- ECI Media Management released its **2026 Media Inflation Report**. Global media inflation is expected to ease to 3.1% in 2026, down from 3.8% forecast for 2025, the lowest level since 2014, excluding 2020—the first year of the COVID-19 pandemic. Factors behind the slowdown include declining headline CPI inflation and a general cooling off of the media market in general following a couple of years of high demand. Per the report: The medium expected to see the highest inflation in 2026 is OOH with 4.2%, followed by online video with 4.1%. TV is at 3.2%, online display at 2.7%, and, the lowest forecasts, radio at 1.1% and print at 0.6%.

» NOTABLE

- **Disney Advertising** announced that it sold out its national TV ad inventory for The 97th Academy Awards at an average of \$2 million for a 30-second ad placement (range is \$1.7 million to \$2.3 million). Sponsors included Rolex, Prudential, T-Mobile, Disney+, and Christian Dior Parfum. The ceremony attracted 18.1 million viewers, a 7% decrease from 2024's 19.5 million. This marks the first decline after three consecutive years of growth. Advertising revenue also saw a modest dip. In 2024, the Oscars generated \$126.6 million in ad revenue on ABC. In 2025, it decreased by 4% to an estimated \$121.5 million, with 59 commercials aired during the broadcast, compared with 64 in 2024.



Other/miscellaneous

» GAME CHANGING

- Per Michael Farmer, **seven crises contributed to the weakening of media and creative agency effectiveness for clients:**
 1. The shift from 15% media commissions to staff-hour billing
 2. Introduction of procurement into client-agency relationships
 3. Split of media agencies from creative agencies
 4. Acceptance of separate (rather than integrated) digital and social agencies
 5. Ignoring the substantial slowdown in advertiser brand growth rates after 2008
 6. Initiation of nontransparent and principal-based media operations
 7. Introduction of AI into creative and media operations
- Per **Forrester**, agencies and brands must reimagine their commercial relationship in the context of the “AI cost center crisis”: 75% of agencies bear the costs, with generative AI capabilities funded directly by the agency without passing the costs to clients while brands should compensate for that value. Forrester advocates for an evolved remuneration model to replace the current full-time equivalent-based services model. The cost of technologies such as predictive, generative, and agentic AI could be permanently coupled with the hourly costs of the experts who wield them, focusing instead on value, outcomes, and growth rather than scopes, FTEs, and billable hours.

“In a knowledge-based economy, innovation is the ultimate currency—a critical driver of growth for brand advertisers and their agency partners.”

Excerpt from the article **Beyond Innovation: Transforming Partnerships for Lasting Value**

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Scan the code or visit agencymania.com/beyond-innovation to read the article “Beyond Innovation: Transforming Partnerships for Lasting Value” where you can explore how innovation can evolve into a sustained competitive advantage. From refining processes to embracing new technologies and talent, this piece offers actionable strategies for driving meaningful and measurable results.

» HIGH IMPACT

- Per David Little of Trinity P3, here are **eight ways procurement professionals protect agencies from bias and corruption**:
 1. They establish transparent processes (use clear evaluation criteria, document decisions, leverage third-party oversight)
 2. They practice robust ethical guidelines (code of conduct, conflicts of interest)
 3. They use technology to mitigate bias (e-tendering platforms, data-driven insights)
 4. They foster open competition (fair access)
 5. They encourage openness (transparent communication, respectful engagement)
 6. They conduct regular audits
 7. They provide training for procurement teams (on ethical procurement practices, bias, and anti-corruption measures)
 8. They provide long-term relationship management (performance reviews, avoid favoritism)
- In the 2024 **ISBA x RightSpend Future of Remuneration** survey, only 48% of brands believe they're getting value for their money from their agencies—down from 83% in 2022. RightSpend's assessment is that this huge drop is likely due to the complexities (with transparency in media buying and cost structures under particular scrutiny) that have crept in over the last few years.
- Per business and revenue model strategist Tim Williams, there are **five types of compensation profiles**:
 1. Clients who hire you for inputs and want to pay you for inputs
 2. Clients who hire you for outputs but want to pay you for inputs
 3. Clients who hire you for outputs and are willing to pay you for outputs
 4. Clients who hire you for an outcome but want to pay you for outputs
 5. Clients who hire you for an outcome and are willing to pay you for an outcome
- Per R3, when tracking **generative AI impact**, top variables to consider: Tracking time (baseline efficiency signal, cost-saving proxy, operational visibility) and tracking output (speed to market and volume, shifts in work, quality, effectiveness).
- Advertising spend for **AI-based search** (known as answer engine optimization, or AEO) is expected to surpass \$1 billion in 2025, or 0.7% of total search ad spending this year, to nearly \$26 billion by 2029 (13.6% of the total).
- Per Adobe Analytics, **AI-driven traffic to US retail websites on Black Friday 2025** increased 805% compared to the previous year, and shoppers arriving via AI services were 38% more likely to complete a purchase. US e-commerce sales rose 9.1% to \$11.8 billion while in-store traffic dropped 3.6% YOY.

» NOTABLE

- Per Lodestar Agency Consulting, there are **five agency growth pathways, from hustle to high-margin scale**:
 1. Transactional services (hourly pricing)
 2. Specialized expertise (hourly pricing)
 3. Output-led growth (fixed-fee projects and deliverables)
 4. Productized value (solution-based pricing)
 5. Market leadership (AI, proprietary frameworks, and high-value IP)
- Per the **ANA's Trends in Agency Compensation**, 19th Edition, the use of performance incentives by brand advertisers in agency compensation dropped to 15% in 2025 compared to 46% in 2022, 58% in 2016, and 61% in 2013, its peak. Labor-based (fee) remains the predominant form of agency compensation at 84%.





- Per Matt Weiss, founder of SoulPurpose Advisory, the **top 10 actions on how to improve work with marketing procurement teams:**
 1. Ask how they're evaluated—and build your plan around helping them win
 2. Set scopes and budgets together, and revisit them quarterly
 3. Bring procurement into kickoff convos—scope, hours, fees, expectations
 4. Consider sharing rate cards (but not margins)
 5. Offer a two-way evaluation process—feedback goes both ways
 6. Bring them ideas that improve clarity, efficiency, or results
 7. Be confident in your value
 8. Never add resources mid-project without a heads up—no unilateral moves
 9. Don't over-service to be "nice"—protect your people, protect your value
 10. Know the relationship type: project? AOR? Strategic? Act accordingly.



Savings alone are no longer a sufficient proof of value—not for procurement and not for marketing.”

—Laura Forcetti, Director, Marketing Services Asia Pacific, and Global Sourcing, **WFA**



- In partnership with John Ryan, CPA, Alta Incentives Group, and APR, the ANA released its **US Commercial Production Tax Incentives** report, providing a road map to help advertisers evaluate eligibility, avoid common pitfalls, and understand how to get cash back on productions.
- Professional services firm **A&MPLIFY by Alvarez & Marsal** released its **“Drowning in Data, Starving for Insight”** white paper, produced in close partnership with Agency Mania Solutions. The paper highlights that brands are richer than ever in data yet poorer in insight, and struggle with aligning marketing metrics to revenue and EBIDTA.

Key client budget moves

» GAME CHANGING

- **Google's** revenue reached \$90.2 billion in Q1, a 12% YOY increase. The company's advertising revenue was \$66.8 billion. Google is aggressively promoting its AI-powered campaign capabilities, Performance Max. **Meta's** revenue reached \$42 billion in Q1, a YOY increase of 16%. Ad revenue was \$41.4 billion. More than 3 billion people are using at least one of Meta's apps each day. Meta forecasts that its AI products will generate \$2 billion to \$3 billion in revenue in 2025, with projections reaching \$1.4 trillion by 2035.
- **Paramount** bought Ultimate Fighting Championship (UFC) rights for \$7.7 billion, an exclusive seven-year agreement. Paramount+ will stream all UFC matches, with some marquee fights also airing on CBS. **ESPN** acquired the NFL Network, a linear cable TV network, and other NFL media assets in exchange for a significant 10% stake in ESPN for the football league, a deal estimated to be valued at \$3 billion.
- Tech giant **Google's Alphabet** reported \$96 billion in Q2 revenue, up 14% YOY, outpacing Wall Street estimates. Spurring the growth are large AI investments in web search and content creation in direct competition with OpenAI, Perplexity, and Anthropic. Google Search and affiliated properties like Gmail and Google Maps generated \$54.1 billion; \$9.8 billion came from YouTube, driven primarily by direct response and brand advertising. Alphabet also reported 450 million monthly active users of the Gemini app. The company plans to spend \$75 billion on AI this year.

» HIGH IMPACT

- **Amazon's online advertising business** generated \$17.29 billion in Q4 2024, an 18% YOY increase, with total retail e-commerce profits reaching \$20 billion in the holiday shopping period. Amazon's ad business has now reached a \$69 billion annual run rate.
- Some of the biggest ad spenders are investing in growth despite the uncertainty. CPG giant **Unilever** is committed to spending between 15% to 16% of sales this year on brand and marketing. The company advocates for its 4V model in social media: variety of creators, volume, virality, and velocity of content.
- **Amazon** reported a net sales increase of 9%, to \$155.7 billion, in the first quarter. In 2024, revenue grew by 11%, reaching \$638 billion. Only 23 countries have a GDP larger than Amazon's revenue.
- Packaged goods giant **Unilever** intends to spend 50% of its media budget on social channels and will increase influencer marketing investment twenty-fold in a move to build an integrated machine for content creation and advocacy.
- Per Parrot Analytics, **Netflix** added 32 million gross global subscribers in Q2, growing twice as fast than competitors (Walt Disney's Disney+ and Warner Bros Discovery's Max). Netflix reported a 16% increase to 301.6 million global subscribers in 2024 (81.4 million in the US).

» NOTABLE

- **NBCUniversal's Super Bowl** ads will be sold for \$8 million for a 30-second unit in 2025. Super Bowl 59 reached \$800 million in gross revenue from advertising sales across all platforms, for Fox and Tubi. Fox reported that 127.7 million viewers tuned into the game.

Holding companies' financial results

» GAME CHANGING

- **Stagwell** had a record year, showing that smaller, “challenger” holding groups are showing tremendous growth potential. They announced Q4 and FY24 earnings, and revenue was up by 20% YOY in Q4, and 12% YOY in FY24, bringing revenue to \$2.84 billion for the full year and profit margin at 20%. The firm reported that its digital transformation (AI-based) business grew by 22% and advocacy revenue grew by 80% in Q4, and full-year net business grew \$382 million. In Q4, Stagwell invested \$23 million in its AI-based software solution, the Stagwell Marketing Cloud, reaching a full-year investment of \$70 million. The firm completed 11 acquisitions in 2024. It is expecting 8% growth in 2025 and \$410 million to \$460 million EBITDA. The firm will no longer issue formal organic growth guidance, favoring total growth including M&A. **Stagwell** reported winning 30% of the competitive RFPs it participated in 2024.
- **Stagwell** reported \$2.3 billion in net revenue in 2024, for 12% growth YOY with \$382 million in new net business (a 41% increase YOY) and EBITDA of 14%, or \$411 million. Stagwell's Marketing Cloud revenue grew by 19%, and digital transformation revenue grew by 13%. The group completed 11 acquisitions, including Team Epiphany (multicultural experiential), Consulium (strategic communications), and Unicepta (media monitoring). The average size of top 25 clients was \$25 million.
- Per **Stagwell's** first Investor Day:
 1. Stagwell implemented a simpler, more client-centric structure into five focused solution areas (marketing services; media and commerce; advocacy; digital transformation; and Stagwell Marketing Cloud)
 2. Appointed its first chief AI officer
 3. Partnered with Palantir to power AI-enhanced media targeting, and with Adobe to elevate content creation and management
 4. Introduced its 5x5 Plan (\$5 billion in revenue, \$1 billion in adjusted EBITDA)
 5. Committed to \$80 million to \$100 million in cost savings through AI
- **Stagwell** reported its Q2 earnings, delivering 8% net revenue growth and \$707 million in total revenue, driven by a robust pipeline and significant client wins, including \$117 million in net new business in Q2 and \$451 million over the last 12 months. Top 25 clients generated more than \$175 million in net revenue, up 26% YOY. Digital transformation net revenue grew 6%. The firm completed its acquisition of ADK Global (an APAC full-service offering, adding 10 new offices for Stagwell in the region) and experiential agency JetFuel (now part of TEAM). The firm launched Unreasonable Studios, producing tech-driven content and original documentaries for brands like Google, HOKA, and Marriott. Adjusted EBITDA margin was 16%.

- **Publicis Groupe** reported revenue of €3.5 billion (\$4.6 billion) in Q1 2025, up 9.4% YOY and 4.9% organic growth. The group reported 12 new business wins in the first three months of the year, including Coca-Cola, Sam's Club, Uber, Goodyear, LinkedIn, Subway, Kimberly-Clark, and Abbott Laboratories. Publicis Groupe also reported €500 million (\$560 million) in M&A investments in digital media, influencer marketing, and data. The group expects to deliver 4% to 5% organic growth in 2025 and a profit margin at 18% or higher. North America net revenue was up 11.3%, with organic growth of 4.8%. Intelligent Creativity was up by high single digits in the quarter, fueled by new business and scope expansions. Technology was down single digits in a context of a continued “wait and see” attitude from clients. Europe net revenue was up 4.3%, and 2.7% organically. Central & Eastern Europe was very strong organically with double-digit growth. Net revenue in Asia Pacific recorded 7.5% growth, and 4.8% on an organic basis. China remained strong at 9.3% organic growth, after 6.7% in Q1 2024. Net revenue in the Middle East and Africa region was up 14.4%, and 11.5% organically. In Latin America, net revenue was up 28.3% organically. In Q1, Publicis Groupe acquired Atomic 212, the leading independent media agency in Australia; BR Media Group, Latin America's leading influencer marketing and content company; Lotame, the leading independent identity solution; and Moov AI, Canada's leading AI and data solutions company.
- **WPP** reported revenue of £3.4 billion in Q2 (a 10.4% revenue drop) and £6.6 billion (\$9 billion) for H1, a 7.8% decline YOY. WPP cited macro uncertainty leading to “cuts to client spending combined with slower net new business and one-off factors.” Operating profit margin was 8.2%, a 2.9 point reduction YOY driven by negative operating leverage and severance action, primarily at WPP Media. WPP reported 3.7% headcount reduction in H1, to 104,000. Significant strategic actions included:
 1. WPP Media: rebranding, simplification, InfoSum, Open Intelligence
 2. Further adoption of WPP Open, now at 69,000 users (85% of client-facing staff) and 5% to 10% uplift on new business conversion
 3. New partnerships (Vercel, TikTok, Criteo) and products (Reputation Capital, Decipher Tech)
 4. Continuing to attract top talent

WPP also mentioned structural cost savings and backoffice efficiencies enabling investment in WPP Open, AI, and data. H1 wins include Electronic Arts, Hisense, and Hero MotoCorp in Media; L'Oréal and Samsung in Influencer; TJ Maxx and Honda in PR; and Generali, IKEA, and Heineken in Creative/Commerce. Performance by business: WPP Media—Q2 LFL impacted by cuts in client spending and the ramping down of a Q1 client loss. Lower overall client spending impacted all agencies, particularly Ogilvy. VML and Hogarth saw some mitigation from new business wins. AKQA improved quarter over quarter but faced continued pressure on project-based work. PR—Burson continued to see a challenging environment for client discretionary spending. Specialist Agencies—CMI Media Group up by double-digits; Design Bridge and Partners returned to growth, offset by declines at Landor and smaller agencies. Performance by market: US and UK impacted by historical client losses and continued pressure on project-based spending; continued impact of macroeconomic pressures weighing on client spending in Western Continental Europe, -15.9% on client assignment losses; and persistent macro pressures in China, -3.9%, due to tough comp and the timing of sporting events in India.





- **WPP** reported revenue of £3.2 billion in Q3 (an 8.4% drop YOY, following its 10.4% decline in Q2 YOY) while revenue less pass-through costs of £2,459 million was down 5.9% like for like (LFL). Quarterly performance was driven by a step down in WPP Media. YTD reported revenue was down 8% YOY. Global Integrated Agencies Q3 revenue less pass-through costs was down 6.2%, with WPP Media down 5.7%, and other Global Integrated Agencies declining 6.5%. By geography, North America was down 6% and the UK decreased 8.9%. Rest of World, at -5%, saw improvement, with growth of 6.7% in India and a decline of 10.6% in China. WPP's top 25 clients are down 2% YTD, including the impact of client assignment losses as well as pressure on CPG, Automotive and Government. New global business included Haleon (global creative for oral care and wellness), Mastercard (global media), EA (global media), Heineken (global shopper marketing and commerce), pwc (global creative/production), Maersk (global media), and Generali (global creative). WPP hired a new CEO, Cindy Rose, in July and announced a five-year extension of its partnership with Google dedicated to advancing cloud and AI technology. 2025 guidance is LFL revenue less pass-through costs growth declining by 5.5% to 6% and a headline operating margin of around 13%, slightly under the initial estimate of 13.5%.



- **Publicis Groupe** reported revenue of €3.6 billion (\$4.3 billion) in Q2, a 4.6% increase (compared to Q2 2024), following strong Q1 growth of 9.4%. The group reported strong performance across all regions in Q2: US +5.3%, Europe +4.6%, APAC +5.7%. Growth came primarily from Connected Media (data, media, CRM, social, commerce), Intelligent Creativity (creative, PR, production), and Technology (Publicis Sapient), despite ongoing “wait and see” attitudes from brands on capital expenditure and IT spend. Publicis Groupe is in a position of strength, gaining significant market share with record new business wins. Organic growth was 5.9%. Personnel costs as of a percentage of net revenue were 66.7% in H1. The group reported an industry-leading margin to 17.4% in H1 while sustaining significant investments (CoreAI platform and talent). Organic growth guidance was increased to close at +5% for the full year as a result of net new business wins.
- **Publicis Groupe** reported revenue of €3.529 billion in Q3, 5.7% organic net revenue growth fueled by scope expansion with existing clients, sustained strong new business, and higher demand for AI-powered marketing and data solutions. The group is performing strongly and gaining share (from WPP among others). Connected media (data, media, CRM, social, commerce) accounted for 60% of revenue, citing high single-digit growth driven by Publicis Media's scale, powered by Epsilon data. The US was the strongest performer, delivering organic revenue growth of 7.1%. Europe grew by 2.8%, Asia Pacific by 6.5%. The firm states that 73% of its revenue is now AI-powered. 50% of the reviews Publicis Groupe won in the past six months were secured without a pitch. The operating margin was slightly above 18%, including investments in M&A and talent. The firm upgraded FY25 organic growth guidance to be between 5% and 5.5%, thanks to sustained demand for AI capabilities.

» HIGH IMPACT

- **WPP** reported \$18.6 billion in revenue for the full fiscal year 2024, a 1% decline YOY. Revenue declined by 4.2% in Q4, driven by client losses and China and project-based spending cuts. The operating margin ended at 15%, driven by structural cost savings and cost discipline while increasing investment in WPP Open, AI, and data. Restructuring and transformation costs included £135m in relation to the creation of VML and Burson, and the simplification of GroupM. The firm reported strong growth at GroupM (2.7%) and 2% growth in top 25 clients, despite what WPP described as a challenging environment in China and some client losses and weakness in client discretionary spend and pressures on project related spend across the board. The group reported declined revenue in the US (-0.6% in 2024 due to client losses in healthcare and CPG. Revenue declined in the UK (-2.7%), Germany (-1%), and China (-20.8%). Spain, France, and India reported decent growth, WPP stated. The group leveraged its WPP Open Media studio to win Amazon, J&J, Kimberly-Clark, and Unilever, reporting a 29% YOY increase in productivity, 86% reduction in delivery time, and 2.3 trillion in AI-optimized impressions. The group projected 3% revenue growth in 2025, with a 16% to 17% operating margin.



- **Publicis Groupe** reported 3.8 billion euros (\$4 billion) in revenue, with 6.3% organic growth in Q4, leading to +5.8% for the full year and ending 2024 as world's largest advertising group. Publicis Groupe realized 16 billion euros (\$16.7 billion), an 8.3% increase YOY, and net revenue of 13.9 billion euros, a 6.6% increase YOY. The group reported strong performance across all regions: US, 4.9%; Europe, 5.4%; Asia Pacific, 6.3%. The group maintained industry-leading financial KPIs, with an 18% operating margin rate. Operating margin rates by region were 19.1% in North America, 17.4% in Europe, 19.9% in Asia Pacific, 7.8% in Latin America, and 4.9% in the Middle East and Africa region. The breakdown of FY 2024 net revenue by sector shows the top four as healthcare (14%), automobile (13%), financial (12%), food and beverage (12%). In North America, net revenue was up 5.1% organically in 2024, fueled by both strong connected media and intelligent creativity. Net revenue in Europe grew by 5.4% on an organic basis, on top of three years at double-digit organic growth. Asia Pacific saw its net revenue grow by 6.3% organically, with China posting 6.4% organic growth despite difficult macroeconomic conditions. The Middle East and Africa region was up 7.4% organically, and in Latin America, organic growth was 22.9%.

- **Omnicom Group** reported revenue of \$4.3 billion in Q4 2024, an increase of \$261.3 million, or 6.4%, with organic growth of 5.2% and net income of \$448 million, with an operating margin of 16.7%. Organic growth by discipline in Q4: 7.1% for media and advertising, 9.1% for precision marketing, 10.3% for public relations, 1.8% for execution and support, and 4.9% for experiential, partially offset by declines: -4.3% for healthcare and -11.6% for branding and retail commerce. Organic growth by region in Q4: 9.9% for the US, 1.8% for Asia Pacific, 1.2% for the UK, 16.1% for Latin America, 0.1% for Other North America, and 1.7% for the Middle East & Africa, partially offset by a decline of 2.1% for Euro Markets & Other Europe. For the full year 2024, the group reported revenue of \$15.7 billion, with organic growth of 5.2%, net income of \$1,480.6 million, and an operating margin of 15.5%. Revenue per sector (above 10% of revenue): pharma and health (16%), food and beverage (15%), automobile (12%), and consumer products (10%). Revenue in 2024 increased \$996.9 million, or 6.8%. Operating expenses increased \$827 million, or 6.6%, to \$13.4 billion in 2024. Salary and service costs increased \$731.3 million, or 6.8%, primarily due to the acquisition of Flywheel Digital. Flywheel won new business with Nestlé USA, Beiersdorf, and, with OMG, Boehringer Ingelheim. The group announced the proposed acquisition of IPG on December 9, 2024. Omnicom expects its revenue to increase by 4% annually.


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- **Personnel costs** totaled 9,224 million euros in 2024, up by 8.3% from 8,514 million euros in 2023. As a percentage of net revenue, personnel expenses represented 66.1% in 2024, compared to 65% in 2023. 2024 acquisitions included AKA Asia, Spinnaker SCA, Downtown Paris, Influential, Mars United Commerce, Mars United Commerce, and Wibilong. For the full year 2025, Publicis Groupe aims to deliver 4% to 5% organic growth and an operating margin rate slightly above 18%, with free cash flow of between 1.9 to 2 billion euros.
- **Interpublic Group** reported total revenue of \$2.9 billion in Q4, with negative organic growth (-1.8%). Organic growth in the US was negative (-3.2%), but international was +0.3%. Net income reached \$344.5 million, declining to 2.3% but with a 24.3% margin. For the full fiscal year, total revenue was \$10.7 billion with organic growth of 0.2%. FY24 net income as reported was \$689.5 million with a 16.6% margin. Organic growth by market: 0% in the US, +7.4% in Latin America, -0.2% in the UK, +2.5% in Continental Europe, -6.5% in Asia Pacific. Top sectors in terms of revenue: healthcare (31%), financial services (14%), tech and telecom (10%), and retail (10%). Salaries and related expenses ended up at \$6 billion, or 65.6% of revenue. Organic revenue at the company's media management arm, Mediabrands, decreased slightly in the fourth quarter 2024 and was up by 0.2% for the full year. Mediabrands gained momentum in Q4 with several wins, including AOR assignments from biotech firm Amgen and meal-kit delivery service HelloFresh. Mediabrands agency Initiative won global media duties for Volvo, and the network also retained Unilever in Latin America and expanded its remit in Canada and the Middle East/Northern Africa region.



- Martin Sorrell-led **S4 Capital** reported a full-year 2024 net revenue decline of 13.6% to 754.6 million GBP (about \$977 million) with an organic revenue shortfall of 11%. The firm is investing in key areas like AI tools and capabilities as it reduced headcount by 7%, to 7,150 employees.
- For the quarter ending March 2025, **WPP** reported revenue of £3.2 billion (\$4.3 billion), down 5% YOY with a 0.7% decline in organic growth and -2.7% like-for-like revenue less pass-through costs growth. WPP cited macroeconomic challenges and the timing of new business as factors impacting financial performance. Revenue from Global Integrated Agencies was down 2.8%, with GroupM down 0.9% while other Global Integrated Agencies declined 4.4%. Public Relations was down 6.6% while Specialist Agencies grew 1.2%. Other Integrated Creative Agencies are experiencing continued pressure on project-based work, particularly on AKQA. By geography, North America was broadly flat at -0.1%, while the UK was -5.5%, Western Continental Europe -4.5%, and Rest of World -3.8%, including growth of 5.5% in India offset by a decline of 17.4% in China. WPP's top 25 clients saw growth of 2.5% in the quarter. WPP won Heineken's global shopper marketing and commerce account; landed media agency of record duties for games giant Electronic Arts; landed work with Generali, Levi Strauss & Co. (PR), and L'Oréal's Influencer portfolio; but lost Coca-Cola as a client, which is moving its \$700 million North America media account to Publicis. WPP is defending its share of the \$2.4 billion Mars business and PayPal's \$130 million media account. WPP reported conducting 6,000 to 7,000 pitches in 2024. The firm completed the acquisition of InfoSum, and its integration into GroupM's data offering accelerates their AI-driven data approach. 60% of client-facing staff are using WPP Open. The group is targeting 3% organic growth and 16% to 17% profit margin, and expects a slow Q2 as well, with improvements in the second half of the year.
- **Omnicom Group** reported revenue of \$3.7 billion, a 1.6% gain in total revenue, with organic growth of 3.4% for Q1 2025. Net income was \$287 million with operating income of \$452 million and a 13.8% margin. The group is focused on the expected closing of the Interpublic acquisition in the second half of 2025. Q1 expenses related to the merger totaled \$33.8 million. Organic growth by discipline: 7.2% for Media & Advertising, 5.8% for Precision Marketing, and 1.9% for Execution & Support, partially offset by declines of 4.5% for Public Relations, 3.2% for Healthcare, 1.5% for Experiential, and 10% for Branding & Retail Commerce. Organic growth by region: 4.6% for the US, 1.7% for Euro Markets & Other Europe, 6% for Asia Pacific, and 14.8% for Latin America, partially offset by declines of 3.6% for Other North America, 0.7% for the UK, and 9.3% for the Middle East & Africa. The group is projecting organic growth of 2.5%-4.5%.



- **Interpublic Group** reported total revenue of \$2.3 billion in Q1 and a significant drop in organic revenue (-3.6%). US organic revenue change was -4%, and total International organic change was -2.6% (Asia Pacific was down 9%). Net loss was \$85.4 million. Media, Data & Engagement Solutions (IPG Mediabrands, UM, Initiative, KINESSO, Acxiom, and MRM) reported organic growth of 2.2%, but Integrated Advertising & Creativity Led Solutions (McCann Worldgroup, IPG Health, MullenLowe Group, Foote, Cone & Belding [FCB], and domestic integrated agencies) reported negative organic growth at 10.3%. Specialized Communications & Experiential Solutions (Weber Shandwick, Golin, Experiential agencies, and IPG DXTRA Health) recorded -2.4%. Salaries and related expenses were down as a percentage of revenue (70.9% vs. 72.1% the year prior). Margin as a percentage of revenue before billable expenses was 9.3%. Given the firm's pending sale to Omnicom, a slowdown was expected.
- **Havas** reported 2.6% organic growth in Q2 and 2.3% in H1 (3.9% in North America), with €1.35 billion in net revenue in H1 2025, up 2.9% YOY. The YOY increase in personnel costs was 1.6%. Adjusted EBIT margin was 10.7%, a 50-basis point improvement, still targeting a margin between 12.5% and 13.5% by year-end. Key client wins include Olive Garden, Azid, and Under Armour, as well as continued growth with clients such as Sanofi and GSK. The group started reaping the benefits of its Converged.AI, an operating system the agency began implementing in 2024 as part of a €400 million AI investment strategy. The system uses machine learning to support media planning, analytics, creative production, and personalization.
- **Dentsu Group** reported net revenue of 1,194.1 billion Japanese yen (\$8.08 billion), up by 5.7% YOY for FY2024, with organic growth flat and an operating margin at 14.8%. The company also reported a significant goodwill impairment loss of 210.1 billion yen in the fourth quarter of 2024, primarily impacting the EMEA and Americas regions. This resulted in a statutory operating loss of 125 billion yen and a net loss of 192.2 billion yen for FY2024. For FY2025, the firm expects organic growth to be within 1% and the operating margin to be 12%, mainly due to upfront investments to restore competitiveness. For FY2027, the firm is targeting 4% organic growth and a 16% to 17% operating margin.
- **Omnicom Group** reported revenue of \$4 billion, a 4.2% increase with organic growth of 3% and net income of \$257.6 million for Q2. Organic growth by discipline: 8.2% for Media & Advertising, 5% for Precision Marketing, 2.9% for Experiential, and 1.5% for Execution & Support, partially offset by declines of 9.3% for Public Relations, 4.9% for Healthcare, and 16.9% for Branding & Retail Commerce. Organic growth by region: 3% for the United States, 2.5% for Euro Markets & Other Europe, 6.5% for Asia Pacific, 18% for Latin America, 2.4% for Other North America, and 0.9% for Middle East & Africa, partially offset by a decline of 2.5% for the United Kingdom. Operating expenses increased \$232.9 million, or 7%, mostly due to expenses related to the IPG acquisition. Media & Advertising (+8.2%) and Precision Marketing (+5%) together represented 68% of total revenue with combined organic growth in excess of 7%. Gross margin (adjusted EBITA) was 15.3% (up 4%). The antitrust review for the IPG acquisition was cleared by the US Federal Trade Commission. The group won the 2024 Effie Index as the Most Effective Holding Group.
- **IPG** reported total revenue of \$2.5 billion in Q2, or 6.6% lower YOY (\$2.71 billion). Organic net revenue decreased by 3.5%. Organic growth was negative in the US (-2.6%), Asia Pacific (-13.6%), UK (-9.7%), and Continental Europe (-1.6%) but up in Latin America (+1.4%). Organic growth varied by discipline: Media, data and engagement solutions (IPG Mediabrands, UM, Initiative, Kinesso, Acxiom, MRM) were down 3.1%; integrated advertising and creativity-led solutions (McCann Worldgroup, IPG Health, MullenLowe Group, Foote, Cone & Belding [FCB]) were down 6.3%; specialized communications and experiential solutions (Weber Shandwick, Golin, experiential agencies, IPG DXTRA Health) saw an increase of 2.3%. Staff cost ratio, which is total salaries and related expenses as a percentage of revenue before billable expenses, decreased to 63.4% compared to 66.9% for the same period in 2024. The operating margin was 11.2%, a slight improvement mostly due to restructuring and reduced operating expenses. Focus remains on completing the firm's acquisition by Omnicom.
- **Omnicom Group** reported revenue of \$4 billion in Q3, a 4% increase YOY, with organic growth of 2.6%. Organic growth by region was 4.6% for the US, 27.3% for Latin America, 3.7% for the UK, and 5.9% for the Middle East & Africa, partially offset by declines of 0.2% for Other North America, 3.7% for Asia Pacific, and 3.1% for Euro Markets & Other Europe. Organic growth by discipline was 9.1% for Media & Advertising, 2% for Execution & Support, and 0.8% for Precision Marketing, partially offset by declines of 1.9% for healthcare, 7.5% for Public Relations, 17.7% for Experiential, and 16.9% for Branding & Retail Commerce. Net income was \$341.3 million and operating income was \$530.1 million with a 16.1% margin. The firm expects to close the Interpublic acquisition in November.
- **Interpublic Group** did not report its Q3 financial performance on time for the publication of this Industry Update. Limited information is expected, given the pending transaction with Omnicom. The firm does not intend to host a conference call to discuss third-quarter results or to update previously issued guidance.
- **Publicis Groupe** expressed concerns over how Omnicom Group reports its financial performance and handles its accounting. Omnicom is believed to be reporting organic growth in gross revenue (e.g., revenue including pass-through costs, which are fees paid to third-party vendors such as production partners or influencers) versus net revenue (without pass-through—a standard used by others such as WPP, Dentsu, Havas, Publicis—many of which report both), therefore artificially inflating their revenue compared to key competitors.
- **Mediahub** won AOR duties for Little Caesars. The increased prevalence of principal-based media buying in media reviews, and specifically the commercial terms enabled by principal media at scale, in addition to some loss of client business have negatively impacted IPG.

Top global media agency networks, ranked by billings:

| Rank | Media Agencies | Total 2023 Billings \$US M | Total 2022 Billings \$US M | Growth 2023 vs 2022 \$US M | Growth 2023 vs 2022 |
|------|------------------|-------------------------------|-------------------------------|-------------------------------|---------------------|
| #1 | Essence Mediacom | 24 510 M\$ | 24 454 M\$ | 57 M\$ | 0,2% |
| #2 | OMD | 24 022 M\$ | 22 106 M\$ | 1 915 M\$ | 8,7% |
| #3 | Mindshare | 20 939 M\$ | 19 752 M\$ | 1 186 M\$ | 6,0% |
| #4 | Zenith | 15 950 M\$ | 14 781 M\$ | 1 169 M\$ | 7,9% |
| #5 | Wavemaker | 15 327 M\$ | 14 668 M\$ | 659 M\$ | 4,5% |

Source: COMvergence

To recap **Q1 FY25 results** of the top 4 holding companies:

| Holding Company | Stock Symbol | Q1 Revenue | Q1 Organic Growth | Q1 EBITA Margin |
|--------------------|-----------------|------------|-------------------|-----------------|
| Publicis Groupe SA | PUBGY (OTCMKTS) | \$4.6B | +4.9% | 18% |
| WPP Plc | WPP (NYSE) | \$4.3B | -0.7% | 16% |
| Omnicom Group | OMC (NYSE) | \$3.7B | +3.4% | 14% |
| Interpublic Group | IPG (NYSE) | \$2.3B | -3.6% | 9% |

To recap **Q2 FY25 results** of the top 4 holding companies:

| Holding Company | Stock Symbol | Q2 Revenue | Q2 Organic Growth | Q2 EBITA Margin |
|--------------------|-----------------|------------|-------------------|-----------------|
| WPP Plc | WPP (NYSE) | \$4.6B | -10.47% | 8.2% |
| Publicis Groupe SA | PUBGY (OTCMKTS) | \$4.3B | +5.9% | 17.4% |
| Omnicom Group | OMC (NYSE) | \$4B | +3% | 15.3% |
| Interpublic Group | IPG (NYSE) | \$2.5B | -3.5% | 11.2% |

To recap **Q3 FY25 results** of the top 4 holding companies:

| Holding Company | Stock Symbol | Q3 Revenue | Q3 Organic Growth | Q3 EBITA Margin |
|--------------------|-----------------|------------|-------------------|-----------------|
| WPP Plc | WPP (NYSE) | \$4.2B | -5.9% | 13% |
| Publicis Groupe SA | PUBGY (OTCMKTS) | \$4.1B | 5.7% | 18% |
| Omnicom Group | OMC (NYSE) | \$4B | 2.6% | 16.1% |
| Interpublic Group | IPG (NYSE) | N/A | N/A | N/A |

To recap **Q4 FY24 results** of the top four holding companies:

| Holding Company | Stock Symbol | FY24 Q4 Revenue | FY24 Q4 Organic Growth | FY24 Q4 EBITA Margin |
|--------------------|-----------------|-----------------|------------------------|----------------------|
| WPP Plc | WPP (NYSE) | \$4.4B (est.) | -4.2% (est.) | 16% (est.) |
| Omnicom Group | OMC (NYSE) | \$4.3B | +5.2% | 16.7% |
| Publicis Groupe SA | PUBGY (OTCMKTS) | \$4B | +6.3% | 18% |
| Interpublic Group | IPG (NYSE) | \$2.9B | -1.8% | 24.3% |

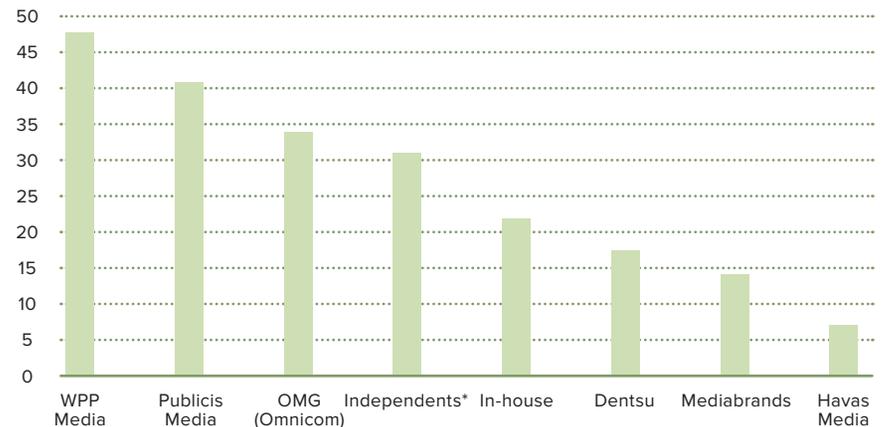
To recap **full FY24 results** of the top four holding companies:

| Holding Company | Stock Symbol | FY24 Revenue | FY24 Organic Growth | FY24 EBITA Margin |
|--------------------|-----------------|----------------|---------------------|-------------------|
| WPP Plc | WPP (NYSE) | \$18.6B (est.) | -1% (est.) | 15% (est.) |
| Publicis Groupe SA | PUBGY (OTCMKTS) | \$16.7B | +5.8% | 18% |
| Omnicom Group | OMC (NYSE) | \$15.7B | +5.2% | 15.5% |
| Interpublic Group | IPG (NYSE) | \$10.7B | +0.2% | 16.6% |

Distribution of the Top 1,000 Global Advertisers Media Spend 2024:

In 2024, the top 1,000 Global Advertisers cumulated a total media spend of \$214 billion, representing a third of the global media spend figure estimated by **COMvergence** (across 50 countries).

Looking at how the Top 1,000 global advertiser media spend breaks out between the Big 6 Groups, WPP Media leads globally with \$47.8 billion, followed by Publicis Media (\$40.6 billion) and OMG (\$33.8 billion). Independent agencies (not part of the Big 6) handled \$31 billion from the Global Advertisers total spend.



» NOTABLE

- Per Joshua Novick, managing partner at Bondo Advisors, about the **state of holding companies**: “Publicis Groupe has experienced a remarkable surge in the past couple of years, growing revenue by 26% from 2021 to 2023 and doubling its market cap from 12 billion euros in early 2021 to over 25 billion euros currently. Omnicom is now its closest competitor, slightly trailing behind in revenue and EBITDA, essentially tied in net income, but trailing by 50% in market cap. Gone are the days when WPP, still the leader in revenue, led the pack of the big five advertising groups. However, it now lags far behind in profitability and value.”
- For Q1 2025, **Havas** reported a total net revenue gain of 5.2% to 649 million euros (about \$727 million) and 2.5% organic revenue growth, especially with strong performance in North America (+3.2% vs. -4% the year prior), especially its Havas Health unit and Latin America. The group acquired three agencies in early 2025: sports marketing specialist CA Sports (Spain), e-commerce media agency Channel Barkers (US), and creative agency Don (Argentina).

Agency financials & budget cuts

» GAME CHANGING

- **Interpublic Group** set in motion a plan to save \$250 million through restructuring within its agencies and other parts of the company in 2025, including centralizing corporate functions, operational, and real estate measures, offshoring and nearshoring in corporate services and client service delivery, and production and analytics services. The firm also plans to invest in talent and technology capabilities in areas such as AI, identity resolution, content management platforms, commerce, and data.
- **Alphabet** (parent of Google) revenue exceeded \$100 billion in Q3 for the first time, a 16% increase YOY, to reach \$102.3 billion. Google Cloud revenues were up 34% (\$15.2 billion) with 70% of Google Cloud customers using Google AI products. Google reported 650 million monthly active users of its Gemini app and 75 million daily active users of AI Mode. Alphabet raised its initial \$85 billion forecast for projected capital expenditures for 2025 in the range of \$91 billion to \$93 billion.

» HIGH IMPACT

- Per Michael Farmer, **creative agency service prices** have been in decline for more than 30 years as indicated by the “price per ScopeMetric® Unit” (a measure of fees divided by agency SOW workloads calculated by Farmer & Company). It declined to \$110,000 per SMU in 2023. This price level is equivalent to \$175 per hour for the required agency FTEs on a ScopeMetric Unit. The total creative product range is about 4,000 unique deliverables across 20 media types.
- Atlanta-based independent full-service agency **Chemistry** received private equity investment from Breakwater Management in a move to scale its creative, digital, production, and media services by investing in talent and technology across its offices in Atlanta, New York, Pittsburgh, and Miami, and through strategic M&A.
- Social media giant **Meta’s** ad revenue in Q3 reached \$50.1 billion (97% of Meta’s total revenue), up 26% YOY. A few highlights: 14% increase in ad impressions delivered across Meta’s apps combined with a 10% increase in average price per ad. Instagram hit a major milestone with 3 billion monthly active users. The company spent \$19.4 billion on capital expenditure, much of it related to developing its AI infrastructure (building new data centers, servers, and computing hardware for training large-scale AI systems). Full year 2025 capital expenditures are forecast to be between \$70 billion and \$72 billion.
- Per COMvergence, \$17.6 billion of **pitch work** was at play in H1, with 1,840 media account reviews in 49 countries (61% local, 39% global). Publicis Media led by a wide margin in global new business wins and retentions (\$6.34 billion, including The Coca-Cola Co.’s \$835 million North America business and new business from Barilla, Dropbox, Goodyear, LinkedIn, Mars, PayPal, and Santander) among media agencies for the first half of 2025. IPG’s Mediabrands ranked second with \$1.5 billion. Omnicom Media rounded out the top 3, with \$1.16 billion. Dentsu and Havas ranked fourth and fifth, respectively, followed by WPP, showing a net decline of \$2.27 billion. For the network level, IPG’s Initiative was top ranked globally (\$1.4 billion) with wins including Paramount and Anthropic. Independent agencies won \$2.98 billion of the total billings reviewed, including two big wins for Horizon Media: Spectrum (\$800 million) and Peloton (\$225 million).

» NOTABLE

- Procurement marketing data aggregator **RightSpend** and in-house agency consultant **InnerGroup** formed a partnership designed to show brands how to boost efficiencies within their marketing operations and close gaps in process, resource, and technology.



Mergers & acquisitions

» GAME CHANGING

- **Omnicom Group** announced a takeover of rival holding company Interpublic Group of Cos., estimated at \$13-\$14 billion, in a bid to create the world's largest advertising group by combining the two New York-listed businesses and accelerating innovation to realize annual savings of \$750 million. The new Omnicom will have more than 100,000 expert practitioners. The company will deliver end-to-end services across media, precision marketing, CRM, data, digital commerce, advertising, healthcare, public relations, and branding. Based on 2023 numbers: combined revenue of \$25.6 billion (57% US, 43% international), adjusted EBITA of \$3.9 billion, free cash flow of \$3.3 billion.
- Elon Musk-owned **xAI** (launched in 2023) acquired social platform X (formerly Twitter) in a transaction valued at \$45 billion in an all-stock transaction. The combination values xAI at \$80 billion and X at \$33 billion (\$45 billion less \$12 billion debt).
- **Omnicom Group and Interpublic Group** plan to save \$750 million post-merger as a result of job cuts and consolidation of back-office and operations: streamlining holding company, middle office, and regional positions, eliminating duplicative overhead, consolidating backoffice and procurement, integrating IT and shared services, aligning real estate, and reducing third-party expenses across their larger combined global footprint. Efficiencies will also come from cutting 40% of the combined companies' corporate expenses, including \$200 million in compensation and \$110 million in general and administrative costs.
- Horizon Media Holdings and Havas partnered in a joint venture, New York-based **Horizon Global**, to collaborate on media reviews ahead of challenges arising from Omnicom's pending acquisition of Interpublic Group. Both firms, privately held New York-based Horizon and publicly traded Paris-based Havas, operate independently, with profits split evenly between the two. Both companies are handling \$20 billion+ in combined 2024 billings. Horizon Global will unite Horizon's Blu platform and Havas's Converged.AI system to form BluConverged.

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» HIGH IMPACT

- **Kantar Group** announced its plans to sell Kantar Media (which operates in more than 60 markets and is a principal competitor in TV measurement with Nielsen) to private equity firm H.I.G. Capital for an estimated \$1 billion, pending regulatory review. Kantar Group is majority-owned by Bain Capital, with a 40% stake owned by WPP.
- Telecom giant **T-Mobile** acquired New York-based Vistar Media, an ad tech firm specializing in digital out-of-home, for \$600 million in a move to grow the carrier's ad business beyond phone and internet plans. Vistar has more than 1.1 million digital screens, including displays in Times Square and other high-traffic areas, to support more than 3,000 advertisers.
- **Interpublic Group** sold digital firm Huge to global private equity firm AEA Investors. AEA Investors is expected to merge Huge with one of its other shops, Hero Digital.
- **Interpublic Group** acquired Intelligence Node, an e-commerce intelligence platform, in a move to enhance its commerce capabilities. It will provide clients with real-time products and market intelligence to understand shopper trends, drive sales growth, and optimize performance in the digital marketplace. The firm leverages AI to aggregate and analyze billions of data points across more than 1,900 retail categories in 34 global markets, delivering insights into product attributes, media, pricing, availability, promotions, and consumer sentiment.
- **WPP** acquired full ownership of T&Pm, the result of the merger of creative agency The & Partnership and media agency mSix, leveraging GroupM's buying power. T&Pm has 1,800 staff in 42 locations. It will continue to operate as a standalone agency, leverage WPP's AI-powered marketing operating system, WPP Open, and partner with WPP agencies to serve clients.
- **Mediaocean** acquired Innovid, an independent New York-based software platform for the creation, delivery, measurement, and optimization of advertising, for \$500 million. The move will integrate that business under Mediaocean's Flashtalking ad tech platform, which includes ad serving, creative optimization, and paid social optimization, to create a premier global, independent, omnichannel ad tech platform. The combined offering includes ad delivery, creative personalization, measurement, and optimization across channels, including digital, social, CTV, and linear TV.
- Per Ad Age, **top deals in the last 10 years that reshaped the advertising industry:**
 1. February 2015: Publicis buys Sapient
 2. September 2015: Innocean Worldwide and Horizon Media launch Canvas Worldwide
 3. September 2016: Dentsu takes majority stake in Merkle
 4. July 2017: Vivendi buys majority stake in Havas
 5. July 2018: S4 acquires MediaMonks
 6. August 2018: Omnicom takes majority stake in Credera
 7. September 2018: WPP merges legacy creative and digital shops Y&R and VML

8. October 2018: IPG acquires Acxiom
 9. November 2018: WPP merges J. Walter Thompson and Wunderman
 10. May 2019: Accenture buys Droga5
 11. July 2019: Publicis buys Epsilon
 12. December 2019: WPP sells majority stake in Kantar
 13. October 2020: Serviceplan Group buys stake in Pereira O'Dell
 14. August 2021: MDC Partners and Stagwell merge
 15. WPP buys AI tech firm Satalia
 16. September 2021: Publicis buys CitrusAd, and Plus Company launched
 17. May 2022: Publicis buys Profitero
 18. June 2022: Dentsu consolidates creative shops under one network
 19. October 2022: Interpublic buys 84% stake in RafterOne
 20. January 2023: WPP merges media agencies MediaCom and Essence
 21. May 2023: Adam&eveNYC and DDB New York merge
 22. June 2023: Dentsu buys Tag Worldwide
 23. October 2023: Stagwell buys AI-focused Left Field Labs, and Burrell Communications acquired by a private equity firm, breaking from Publicis
 24. November 2023: Globant invests in Gut, and Stagwell buys Movers+Shakers
 25. January 2024: Omnicom buys Flywheel, three iconic agency brands disappear in VML merger, IPG sells Deutsch New York and Hill Holliday, and Stagwell buys Team Epiphany
 26. March 2024: Barkley and OKRP merge
 27. July 2024: Publicis buys Influential
 28. September 2024: Publicis buys Mars United Commerce
 29. December 2024: IPG sells Huge to a private equity firm, and Omnicom and IPG announce proposed merger
 30. January 2025: Publicis merges Leo Burnett and Publicis Worldwide to form Leo
- **The Federal Trade Commission** opened a routine antitrust investigation into Omnicom Group's proposed acquisition of Interpublic Group, focusing as expected on the competitive impact the combination would have on advertisers.
 - Bain Capital and WPP Group-owned **Kantar Group** sold their Kantar Media unit alternative investment firm H.I.G. Capital for approximately \$1 billion. Kantar Media offers media audience measurement services in 60+ markets worldwide.





- Per ID Comms, top opportunities for advertisers in light of the upcoming **Omnicom/IPG merger**:
 1. Don't panic, but start preparing
 2. Ask the hard questions (ability to deliver, benefits of the merger)
 3. Reassess your current agency setup
 4. Think about the long game
 5. Stay opportunistic

The merger's potential impact on brands' organizations:

1. Pricing and negotiation (reduced competition, bundled services, negotiation strategies)
2. Service and capabilities (broader capabilities, service quality, gaps in service)
3. Innovation and technology (accelerated innovation, data and tech leverage, new solutions)
4. Talent and resources (geographic considerations, talent attrition, attracting and retaining talent, resource allocation)



If more clients embraced a creds and chemistry review, they would see it creates a more equitable engagement partnership with brands and agency partners.”

—Jonathan Schoenberg, Executive Creative Director, **TDA Boulder**

TDA_Boulder

- **Publicis Groupe** acquired Lotame, a data management, identity, and technology firm with 1.6 billion global IDs, in a move to expand the group's global identity and data-management capabilities and shift to an identity-as-a-service approach by connecting Lotame to the Publicis Groupe data platform, Epsilon. Lotame works with 4,000 brands and publishers in 109 countries. The group now has access to 4 billion unique profiles.
- A management-led buyout group backed by Los Angeles-based private equity firm **TrueLink Capital Solutions** acquired Interpublic Group's digital agency R/GA. TrueLink states it will invest \$50 million in an innovation fund to support the agency's efforts in generative AI, talent, product development, and acquisitions.
- Per Ciesco, there were 2,306 **M&A transactions in the media and marketing sectors** in 2024, a 12% increase YOY. “While total deal value declined 11% to \$129.8 billion, deal value excluding mega-deals (deal value >\$10 billion) surged 47% to \$63.8 billion, reflecting a shift towards mid-market acquisitions and strategic consolidation,” Ciesco stated. Agency Services & Strategy saw the highest activity, with a 32% increase YOY, followed by Digital Media. Key trends include:
 - High interest rates and capital deployment
 - AI and automation driving investment
 - Data privacy and first-party data strategies
 - Shifts in consumer and advertiser behavior
- **WPP** acquired InfoSum to bolster the holding company's data measurement capabilities for clients. InfoSum will sit under GroupM but continue to operate as its own entity and brand.
- **Publicis Groupe** acquired Portland, Oregon-based Adopt, a global sports and culture-focused marketing agency that provides branding and marketing services for sports, wellness, nutrition, tech, and consumer companies such as Lululemon and The North Face. The move intends to “harness the power of athletes and sport to accelerate iconic and authentic cultural brand connections.”
- **Stagwell** acquired Brooklyn-based experiential marketing agency JetFuel with capabilities that include live brand experiences, retail and shopper marketing, digital content, and sponsorship activations. JetFuel will become a subsidiary of Stagwell's experiential agency, Team.
- **Havas** invested in Ostro, the AI-powered platform designed to improve engagements between consumers, healthcare providers, and brands in the pharmaceutical, biotech, medical devices, and related sectors, in a move to support Havas Health Network clients and expand into Havas Creative and Media Networks.
- The **US Federal Trade Commission** concluded its antitrust review of Omnicom's proposed acquisition of Interpublic and reached agreement with Omnicom and IPG on a mutually acceptable consent order, clearing the way for the transaction to proceed.
- **Dentsu** (through Dentsu Ventures) invested in Silicon Valley business automation platform Kognitos, which claims to be the first neurosymbolic AI platform, merging symbolic reasoning with the adaptive learning of modern AI.
- **Publicis Groupe** acquired Charlotte, North Carolina-based sports and entertainment marketing agency Bespoke. The agency, which helps brands connect with leagues, teams, and other sports properties through its consulting and creative services and event activations, will sit within Publicis Connected Media and be part of the holding company's broader sports marketing offering.
- **Publicis Health** acquired p-value Group, a Cedar Knolls, New Jersey-based medical communications group. The firm supports pharmaceutical, biotech, and medical device clients around the world. Capabilities include translating complex clinical and scientific data and results, research findings, and more into clear content tailored to various audiences like healthcare professionals, patients, regulatory bodies, and payers.



- **Accenture Song** acquired US-based social and influencer agency Superdigital in a move to address rising client demand for creator marketing (shortform video and social-native content production) and reinforcing social as a full-funnel marketing channel.
- **PMG** acquired the Boston-based retail media shop Momentum Commerce in a move to expand experience in retail media and marketing across Amazon, Walmart, Target, Instacart, and other retail platforms. Momentum's AI-powered proprietary Velocity commerce tech and data platform is being integrated into PMG's stack.
- **Holding company M&A** was limited in Q3 2025. WPP acquired no firms during the time period, focusing on its restructuring and declining performance. Publicis Health, a subsidiary of Publicis Groupe, acquired p-value Group, a full-service medical communications company that works with life science clients. Omnicom Group is expected to complete its acquisition of Interpublic Group in Q4 after securing regulatory approvals in various markets. It will be the world's largest advertising network by revenue.
- Global marketing agency **Incubeta** acquired RocketSource, an AI-driven consultancy, in a move to strengthen Incubeta's human-centered AI offerings. Clients will be able to leverage RocketSource proprietary frameworks that deliver marketing at scale, behavioral science knowledge, and enterprise-grade data analysis to enable precise audience identification and metrics.
- Empower Media merged with Ocean Media, based in Huntington Beach, California, to form an independent agency group with \$1.5 billion in media billings called **Empower Ocean Media Group**. The combined entity, which will centralize technology, media negotiations, and procurement activities, and focus on advanced data insights, proprietary platforms, and performance driven media strategies, is now the second-largest independent media agency group in the US by billings, after Horizon Media.
- Canadian private equity group **Novacap** acquired Integral Ad Science (IAS), an adtech firm specializing in ad verification and measurement, for \$1.9 billion. IAS operates cloud and AI-based technology that provides independent verification and measurement of digital ad campaigns across channels and devices.
- **Stagwell** acquired a 35% stake in Real Clear Holdings, publisher of the RCP Poll Averages, news publication RealClearPolitics, and 12 other news and analysis sites in a move to leverage RealClear's audience, op-ed aggregation, and polling capabilities for its clients.
- **Netflix** plans to acquire Warner Bros., including its film and television studios, HBO Max and HBO, following the separation of Discovery Global, for a total enterprise value of \$82.7 billion. The deal will bring together two pioneering entertainment businesses, combining Netflix's innovation, global reach, and best-in-class streaming service. **Paramount Skydance Corp.** launched a hostile takeover bid for Warner Bros. Discovery Inc. at \$30 a share in cash shortly after Netflix's offer. The offer values Warner Bros. at \$108.4 billion, including debt.
- **Havas** acquired French data consulting and engineering firm Unnest in a move to boost its expertise in designing and deploying data platforms. Unnest will be aligned with Havas Media Network's global data, technology, and analytics arm, CSA, whose unit helps clients with digital transformation solutions.
- Performance marketing agency **Wpromote** (Ad Age 2025 Performance Agency of the Year) acquired creative firm Giant Spoon in a move to combine strategy, creative, tech, media, and performance marketing under one roof. The combined entity (700+ employees) will operate as Wpromote x Giant Spoon with a single P&L, and leverage its Polaris IQ, an AI intelligence platform that helps inform media strategies and customer insights. Clients include HBO, Lucid Motors, Walmart, Google, Peacock, and Intuit QuickBooks.



Agility is the key. There are areas where the world stage is changing, and it's our responsibility to stay on top of that and ahead of it."

—Emily Ketchen, Senior VP, CMO for Intelligent Devices Group and International Markets, **Lenovo**

Lenovo

- **Adobe** acquired Semrush, a software platform known for providing SEO and AI-driven marketing tools to companies like Amazon, for \$1.9 billion. The move is to enhance its AI capabilities and help marketers better understand how their brands are displayed to consumers online and run better SEO.
- **Publicis Groupe** acquired HEPMIL Media Group, Southeast Asia's preeminent influencer agency. HEPMIL serves more than 450 brands through its relationships with 3,000 high-value creators, with a total creator reach exceeding 1 billion in six Southeast Asian markets. HEPMIL will continue to operate as a brand, collaborating with Publicis Groupe teams in the region.



» NOTABLE

- Agency network **Havas** became an independent, publicly traded business following a spin-off from parent company Vivendi (which acquired it in 2017). It debuted on the Euronext Amsterdam exchange with a valuation of \$2.6 billion. Havas, with 23,000 employees, made 10 acquisitions in 2024, including the social media agency Wilderness and B2B shop Ledger Bennett.
- **Mediaocean** launched a partner program called Certified Service Partner, initially with Interpublic Group, Omnicom Group, and WPP, giving the holding companies small equity stakes in the ad tech company. CSP is designed to enable them to integrate and offer Mediaocean's ad tech services (Flashtalking and Protected by Mediaocean) for ad serving, creative optimization, paid social optimization, fraud detection, and brand safety, the company said.
- **WPP** sold a majority stake in FGS Global to KKR-backed Kite Bidco Inc. for \$775 million in cash. WPP created the company in 2021 by merging strategic communications and public affairs firms Finsbury, The Glover Park Group, Hering Schuppener, and Sard Verbinen & Co.



We live by a simple motto: Be hard on the work, kind to the people. Friction is part of that process.”

—Dominic Goldman, Founder and Chief Creative Officer, **You're The Goods**

You're™ Goods

- **Publicis Media** acquired impact film-marketing agency Picture Motion in a move to strengthen its existing content capabilities and sit within its specialty entertainment division, Publicis Media Content & Innovation, collaborating with brand clients and entertainment industry partners.
- **Stagwell** acquired Germany-based Unicepta, a global media monitoring and analytics platform, joining Stagwell Marketing Cloud's PRophet Comms Tech Suite of AI-powered offerings for PR and marketing professionals. Unicepta, with headquarters in Cologne and offices in Berlin, London, Paris, São Paulo, Shanghai, Washington and Zurich, provides monitoring and data analytics for Fortune Global 500 companies.

- **Stagwell** acquired Create. Group, a Middle East digital agency headquartered in the UAE that specializes in strategy, social media, content production, and data analytics. The agency is composed of Create., the digital agency, and Create. Production, the content production studio. It will be aligned with Stagwell's digital agency network Code and Theory.
- Boston-based Software company **Later**, a specialist in developing influencer marketing and social media management software, acquired influencer platform Mavely (aka "Everyday Influencer Platform" with its 120,000-plus creators) for \$250 million in a move to deliver "full-funnel impact and measurable ROI for marketers while enabling creators to maximize their earnings through social commerce."
- Toronto-based healthcare marketing agency **Klick Health** acquired Peregrine Market Access, a consulting, communication, and commercialization agency serving the life sciences industry, in a move to strengthen Klick Health's operations that focus on value, access, and reimbursement activities.
- Independent creative agencies **DNA** (LGBTQ+ and Black-owned) and **Little Hands of Stone**, both based in Seattle, merged to form DNA&Stone. DNA brings media and communication planning capabilities to Little Hands of Stone. Combined clients now include Rover, Amazon, Purina, Providence, and Rainier Beer.
- Toledo, Ohio-based advertising and brand management agency **Hart** acquired Rebuild, a Detroit-based agency that specializes in developing creative strategies for connective brand campaigns.
- Creative agencies **Merrick Creative**, based in Greenbelt, Maryland, and **Ellen Brass Design**, based in Denver, have merged, combining decades of expertise in branding, marketing, and design across industries such as real estate, food and beverage, hospitality, and consumer products. They will operate as Merrick Creative.
- **Stagwell** acquired Gold Rabbit Sports, a global sport marketing agency that helps brands, rights holders, and media companies unlock the communications and commercial potential of sports and entertainment. Gold Rabbit Sports will become a subsidiary of Stagwell's integrated experiential agency TEAM.
- **Stagwell** acquired ADK Global, a network of overseas subsidiaries managed by ADK Holdings, in order to expand the network's offering in APAC across media, creative, PR, and local/regional clients. Headquartered in Japan and with offices in 10 markets around the world, ADK Global states that it delivers integrated marketing solutions based on a deep understanding of local markets, media, and consumers.
- **Horizon Sports & Experiences**, part of Horizon Media, acquired Strategic, a sports, lifestyle, and entertainment marketing agency. Agency clients include Pepsi, AB InBev, Target, and Toyota.



- **Publicis Groupe** acquired São Paulo-based influencer marketing agency BR Media Group in a move to expand its growing influencer capabilities into Latin America. The agency has a network of more than 500,000 creators across Latin America, including 80% of the largest influencers in the region and clients like Unilever, McDonald's, SC Johnson, Amazon, and Visa.
- **Publicis Media US** acquired Dysrupt, a performance-driven digital marketing agency focused on paid media, creative, and measurement. Dysrupt's proprietary media solution, Impact Advertising System, improves full-service ad management for Publicis Media clients in categories including e-commerce, entertainment, fintech, health and wellness, and subscription.
- Independent global OOH media and London-based agency **Talon** acquired Amsterdam-based Out of Home Masters, the largest independent OOH specialist in the Netherlands, in a move to strengthen Talon's leadership position in Europe. Out of Home Masters provides data-driven campaigns for top brands and agencies.
- Marketing company **OvareGroup** acquired Buenos Aires-based Togetherwith, a former affiliate agency within IPG's FCB network, in a move to expand its capabilities across the healthcare, education, food hospitality, consulting, and retail sectors. Togetherwith will integrate its operations within OvareGroup's network that includes offices in Louisville, Miami, Buenos Aires, and Toronto.
- UK-based and AI-powered content provider **Inspired Thinking Group** acquired PureRed in a move to expand to the US. The firm leverages its AI-powered platform, Storyteq, a leading content marketing and digital asset management platform in Europe.
- **Havas** acquired Don, an independent creative agency, based in Buenos Aires and Mexico City, in a move to strengthen Havas' global creative presence and enhance its presence in Argentina and Latin America. Operating as Don by Havas, the agency, the first independent agency in Argentina, joins the Havas Creative Network, relocating to Havas Village Argentina and integrating with Hoy Argentina.
- Experiential marketing **Opus Agency** acquired The Company We Keep (The CWK), an Asia Pacific-based experiential marketing agency with offices in Australia, Singapore, and New Zealand, in a move to allow Opus Agency to provide regionally tailored service for a shared client portfolio, including Salesforce and TikTok.
- Orlando-based media agency **Net Conversion** acquired Los Angeles media buying agency Elevate The Outcome, a specialist in direct-to-publisher relationships. The combined entity leverages blockchain technology for media transactions and AI-powered data analytics to streamline campaign performance tracking and improve reporting capabilities.
- Food-delivery service **Wonder** acquired independent media company Tastemade to provide more curated and personalized digital media experiences for consumers of its family of brands.
- Per COMvergence, **M&A transactions in the marcom agency space** declined by 37% in 2024 (52 transactions, 13,324 employees) compared to 82 in 2023. Publicis Groupe (seven deals, including Mars United Commerce) led with a clear focus on digital and data-centric offerings. Next was Accenture (two deals). Stagwell Global stood out for its diverse acquisition strategy and led in volume across all agency segments. WPP completed three deals, including New Commercial Arts. IPG and Omnicom completed two deals each (IPG with an e-commerce intelligence platform and a digital marketing consultancy, and Omnicom with a digital advisory firm and a post-production studio). Management consultancies have notably scaled back, with only 12 acquisitions in 2024. (Accenture has historically led in this area, making half of all consultancies-led acquisitions in recent years.) Since 2016, COMvergence has recorded 786 acquisitions in digital, data, media, and creative.
- **Publicis Groupe** acquired Captiv8, a leading tech firm providing software for running influencer marketing campaigns (with a network of 15 million creators in 120 countries) as part of an ongoing effort to expand its global influencer offering. San Francisco-based Captiv8 operates in Chicago, New York, and London, and has a range of tools for creator identification and influencer campaign management and measurement.
- London-based marketing group **Common Interest** acquired a 51% stake in the London-based creative agency Amplify (with offices in New York, Los Angeles, Paris, and Sydney). Amplify clients include Lego, Google, Pinterest, PlayStation, and Nike. The agency has audience specialty teams Seed (focused on youth/Gen Z) and Wonder (focused on B2B).
- Full-service agency **Walz Tetrack Advertising** acquired Outrider, a content and video production company. Both are based in Kansas City, Kansas.
- Pittsburgh-based integrated marketing agency **Brunner** acquired Rakuten Advertising's Performance Solutions group, which includes paid search and programmatic planning and buying teams, in a move to strengthen the agency's specialty talent in retail/e-commerce, travel, and hospitality, and lead generation.
- **Viamedia** acquired LocalFactor, a Connecticut digital ad company specializing in omnichannel programmatic advertising and will operate as a division of Viamedia in a move to create an integrated powerhouse in localized advertising. LocalFactor's Geo-Graph and Attention+ Studio technology will be integrated into Viamedia for precise, privacy-compliant audience targeting across micro-localities.
- Multicultural ad agency **Burrell Communications Group** acquired Atlanta-based Fitzco in a move to create the first Black-owned agency network, BCG Worldwide. Fitzco will continue to operate as a separate entity.
- Plus Company-owned **We Are Social** acquired creative studio Helo, folding it into the Plus Company US Narrative unit to strengthen Narrative's production across AI, experiential, and tech-enabled content. Helo UK will continue to operate as an independent production entity.



- **TBA Worldwide**, a Charleston, South Carolina-based independently owned collective of ad agencies and specialty marketing firms, acquired Salesurf Growth, a performance-driven Amazon marketing agency. It will operate as a standalone shop and continue to serve its roster of DTC brands.
- **Havas** acquired Toronto-based CRM and digital transformation specialist Enverta Digital, with clients such as CIBC and PepsiCo. The firm will be aligned with Havas CX Canada.
- Per Alantra, while macroeconomic headwinds and policy-driven uncertainty slowed **M&A activity** early in the year, confidence rebounded in Q2, triggering a sharp uptick in deals. Recent precedent transactions span AI-driven marketing tools, e-commerce consultancies, and digital experience platforms, highlighting continued buyer appetite for high-growth, differentiated assets. Examples of recent deals are Infosum acquired by WPP; Lotame acquired by Publicis Groupe; Sincera acquired by theTradeDesk; tagdigital acquired by Freeman; ADK Global acquired by Stagwell; and R/GA acquired by TrueLink Capital.



I still strongly believe in creativity, but you want to be informed by the data, and then you want to validate success by the data.”

—Jim Mollica, CMO, **Bose**

BOSE

- Global marketing company **Attivo** acquired AI digital marketing and branding agency The Next Practice (TNP), based in New York and Austin, to strengthen the company's AI efforts in healthcare, packaged goods, and tech in B2B, DTC, and B2E. TNP will join other recently acquired assets including Hill Holliday and Deutsch NY.
 - Columbus, Ohio, marketing agency **The Shipyard** acquired digital agency TinyWins, which has offices in Santa Monica and Denver. TinyWins' capabilities include strategy, creative, design, and digital, as well as expertise in AI, Web3, and app development. Clients include Albertsons, Samsung, and Budweiser.
 - Agency group **Mindgruve** merged with performance marketing agency Levelwing in a move to strengthen its performance marketing offering. The merger expands its US footprint and adds a portfolio of clients in multiple industries with a team of over 400 employees in eight US, Latin American, and European offices.
 - Tech investment company **Driftwood Music Corp** acquired Nashville-based ad agency FlyteVu in a move to provide capital and resources to execute the agency's expansion plans.
 - Phoenix-based **Harkey Media** acquired Mesa Outdoor, a leading independent OOH operator in the San Francisco Bay Area in a move to expand to key US markets like NYC, LA, Boston, and Las Vegas.
 - Boston-based advertising agency **Connelly Partners** acquired McCarthy Mambro Bertino, another independent agency in the Boston area. The deal brings Connelly to about 175 staff, including 100 in Boston.
 - UK-based media agency **Brainlabs** acquired LA-based media agency Exverus in a move to expand the agency's reach and full-funnel media capabilities (including its AI-driven media planning tools) in North America.
 - London-based marketing agency **Gravity Global** acquired performance media agency Marketing Doctor to expand its presence in the US, strengthen its media practice, and deepen its expertise in complex industries like aviation, semiconductors, and franchised retail.
 - Digital media company **Literally Media** acquired the entertainment publisher Den of Geek in a move to broaden its portfolio beyond comedy and internet culture and deepen its coverage of movies, TV, gaming, and comics.
 - Independent company **R/GA** acquired AI-native system design and development studio Addition, in a move to offer innovative AI solutions as well as cutting-edge AI-enabled processes, blueprints, and services for many of the world's leading brands. Clients include Google, NBCU, Unilever, and Amazon.
 - **Connelly Partners** acquired Boston-based agency McCarthy Mambro Bertino (MMB), responsible for Sam Adams, Newell Rubbermaid, Toyota, and Subway campaigns, with offices in Dublin and Vancouver. The MMB team will integrate across the Connelly network, much like previous acquisitions ZOO Digital and VRX Studios.
- **Havas** acquired Spanish digital performance and e-commerce strategy agency Tidart in a move to strengthen its global performance and e-commerce capabilities. The agency maintains its brand and operational structure, while integrating into Havas Media Network's global e-commerce practice, Havas Market.
 - Marketing consultancy **Rival** acquired London-based Oat Studio to serve clients such as Xerox, JPMorgan, Reebok, Unilever, Tumblr, NASCAR, and Keurig Dr Pepper. Oat Studio is being rebranded to Rival Design as part of the move.
 - Mid-Atlantic marketing communications agency **Aloysius Butler & Clark** acquired Oxford Communications, a firm specializing in strategic planning, branding, and advertising. Oxford will provide additional social media marketing and expanded paid media services for the combined entity.

- Strategic experiential agency **George P. Johnson** acquired Cresci's, a Miami-based design and creative agency, which services B2B technology brands with clients such as IBM, Turbo Tax, Google, Cisco, and Salesforce.
- **M+C Saatchi Group** acquired Women's Sports Group (WSG), an advisory and media rights consultancy, in a move to strengthen the firm's expertise in rights acquisition, brand storytelling, partnerships, and fan growth. WSG will maintain its brand but operate as part of M+C Saatchi Sport & Entertainment.
- Colorado private equity firm **Mountaingate Capital** bought a majority interest in Chicago-based B2B marketing agency Walker Sands from Stone-Goff Partners in a move to strengthen the firm's offering in data, analytics, measurement, and technology.
- **HW Fisher**, part of the Sumer Group, acquired Media Marketing Compliance (MMC), a London-based independent global specialist providing financial transparency to advertisers. The move aims to strengthen HW Fisher's forensic and audit capabilities by integrating its expertise in licensing and investigations with MMC's specialist knowledge in auditing media and marketing agencies across the globe.
- Design and technology agency **Huge** acquired creative studio Both&Yes to expand and strengthen the firm's capability in digital creative. Interpublic sold Huge to AEA Investors the year prior, which subsequently merged Huge with another agency, Hero Digital.
- Miami-based marketing agency **Mod Op** acquired customer engagement specialist Ascend Marketing to expand its B2B marketing capabilities, such as leveraging CRM and marketing automation platforms like HubSpot and Adobe Marketo Engage. Mod Op clients include Nestlé, Duracell, ExxonMobil, and DoubleVerify.
- **Havas** acquired London-based experiential agency Bearded Kitten with offices in Lisbon and Sydney and clients such as Netflix, Unilever, Intuit, Red Bull, Pokémon, Google, Disney, and L'Oréal. The agency rebranded as "Bearded Kitten, Part of Havas Play" and will join Havas's experiential division Havas Play, part of Havas Media Network.
- Toronto-based agency **Bond** acquired UK CRM agency Armadillo in a move to strengthen its personalized marketing capabilities across nearly 200 million consumer profiles worldwide. The combined entity (850 employees) is a specialist in customer intelligence, loyalty, behavioral science, and data and analytics in North America and Europe, assisting clients in strengthening ties to customers, media partners, and employees for brands such as Adobe, Bath & Body Works, Ford, Gap, McDonald's, and Sephora.
- **Havas** acquired Australia-based independent media agency Kaimera, which will join the Havas Media Network. This acquisition increases Havas ANZ's staff to 450 with resources from Sydney, Melbourne, and Auckland, New Zealand.

Payment terms & compensation

» GAME CHANGING

- **Interpublic Group of Cos.** CEO Philippe Krakowsky is expected to receive a golden parachute currently valued at \$49 million (including payouts of cash, equity, pension/deferred compensation, and perks/benefits) and a top job at Omnicom (co-president and co-chief operating officer) as a result of the proposed IPG and Omnicom merger.
- The 4As released its "**Agency Compensation and the Transparency Trap: Where to Draw the Line**" research paper. Per the study, 40% of consultants never request disclosure of agency overhead/profit data; 24% ask all the time; 12% rarely do. Fixed fee is the most popular model (25% of total rankings), followed by hybrid models (21%), cost-plus (17%), and hourly rate (15%). Much less common are performance-based fees and bonuses (9%), outcome-based fees (3%), pre-negotiated price lists (3%), and subscriptions (1%). 52% favor moving away from hourly/cost-plus models (16% strongly, 36% somewhat). 56% agree that deliverables-based compensation better serves all parties (12% strongly, 44% agree).
- **WPP** is involved in a \$100 million lawsuit filed by a former executive at the company alleging that he was terminated for raising concerns about improper inventory and rebate practices related to media buys by GroupM/WPP Media (the claim is that \$1.5 billion to \$2 billion of rebates should have been returned to clients but that WPP pocketed instead).



» HIGH IMPACT

- Gartner issued its "**Building the Marketing Function of Tomorrow**" research. Per the study, only 24% of CMOs had sufficient budget in 2024 to execute their strategy, requiring them to use ZBB (zero-based budgeting), a management accounting technique in which budgetary judgments are made for each line based on projected return and alignment with strategic goals.

The five steps are:

1. Start with a zero base and define the scope of marketing costs
2. Reprioritize investments using ZBB
3. Pressure-test key assumptions underpinning your model
4. Apply budget scenarios to the ZBB model
5. Build a regular cadence of ZBP planning and collaboration

- The WFA and the global media advisory firm mediasense released a study titled “**Future of Agency Remuneration.**” Three quarters of brands want to change their agency remuneration model to deliver better alignment to business outcomes, greater accountability, and improved access to talent. 84% highlighted the lack of data and measurement between the advertiser and agency to measure outcomes as a major barrier, and 87% believe agencies are resistant to adopting models that require greater transparency in how they make money. 75% care about how their agencies make money, but only 28% believe they have transparency into how they do. 61% expect agency fees to increase over the next three years. When AI is deployed, 58% of brands expect to pay less.
- **World Federation of Advertisers** launched a Transparency Tool, in partnership with Ebiquty, designed to help benchmark contact transparency across key areas of media practice, comparing elements of their media agency master service agreement against the wider market on issues such as governance, rebates, and principal media.

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The more that marketers’ ‘gut feeling’ can be backed up by science and data, the better.”

—Jake Abel, Head of Marketing Operations, Strategy and Media, **Delta Air Lines**



- Per Ignition’s **2025 US Agency Pricing and Cash Flow Report**, almost all (97%) small and midsize ad agencies are planning price increases in 2025. 36% expect to boost prices by 5% to 10%; 28% forecast increases of 11% to 15%; and 10% planned hikes of more than 20%. 45% adjust their prices only at contract renewal, while 22% never review prices at all.
- JFE International Consultants issued its “**Beyond FTE: A Practical Roadmap for Adopting Outcome-based Compensation in the Age of AI**” white paper, providing key guiding principles:
 1. Anchor pricing to impact
 2. Bundle capabilities across functions (combining media, creative, and production)
 3. Treat AI as embedded infrastructure (AI should be woven into an agency’s offering and pricing structure)
 4. Get ahead of the RFP process. Key challenges: Client CFOs resist variable payments; intermediaries default to FTE in pitches; typical inertia; and a lack of templates

- The ANA released its 19th edition of the **ANA Trends in Agency Compensation Report** with the following key findings: Fees are predominantly used by 84% of brands; use of performance incentives with at least one of their agencies has declined to 15% (its lowest level since 1991—qualitative agency performance reviews are used to evaluate agency performance in nearly 9 out of 10 relationships); CMO or the brand leader own the compensation model decision in 73% of the cases; the two agency services for which agencies are used on a project basis the most are strategic/branding (71%) and influencer/creator marketing (60%).
- **4As** released its 2025 Billing Rate Benchmark Report with updated agency hourly billing rates. This report is a helpful framework for both agencies and advertisers when establishing benchmarks and pricing in the US. The report is a mix of network (52%) and independent (48%) agencies, 36,000+ data points, including 1,400+ blended rate data points from 163 offices across 239 agencies and 69 new job titles.
- Per Ignition’s **2025 US Agency Pricing and Cash Flow Report**, 78% of agencies don’t bill for out-of-scope work, 97% chase late payments, and 63% claim that cash-flow volatility is limiting their growth.

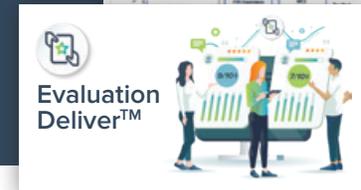
» NOTABLE

- **Kohl’s** CEO Ashley Buchanan was terminated after the board found he directed the department store chain to do millions of dollars of business with a vendor he had a personal relationship with. This is a reminder of the importance of enforcing procurement policies at all levels of the organization.
- Per the **Gartner 2025 CMO Spend Survey**, 39% of CMOs plan to cut labor costs and 39% plan to cut agency allocations. 61% of companies view marketing as a profit center (up from 53%).

Need to evaluate your agency partners?

Do you need to validate that you have the right agency partnerships in place? There is a better way.

To learn more, scan the code or visit agencymania.com/evaluationdelivercapabilities to check out our EvaluationDeliver video.



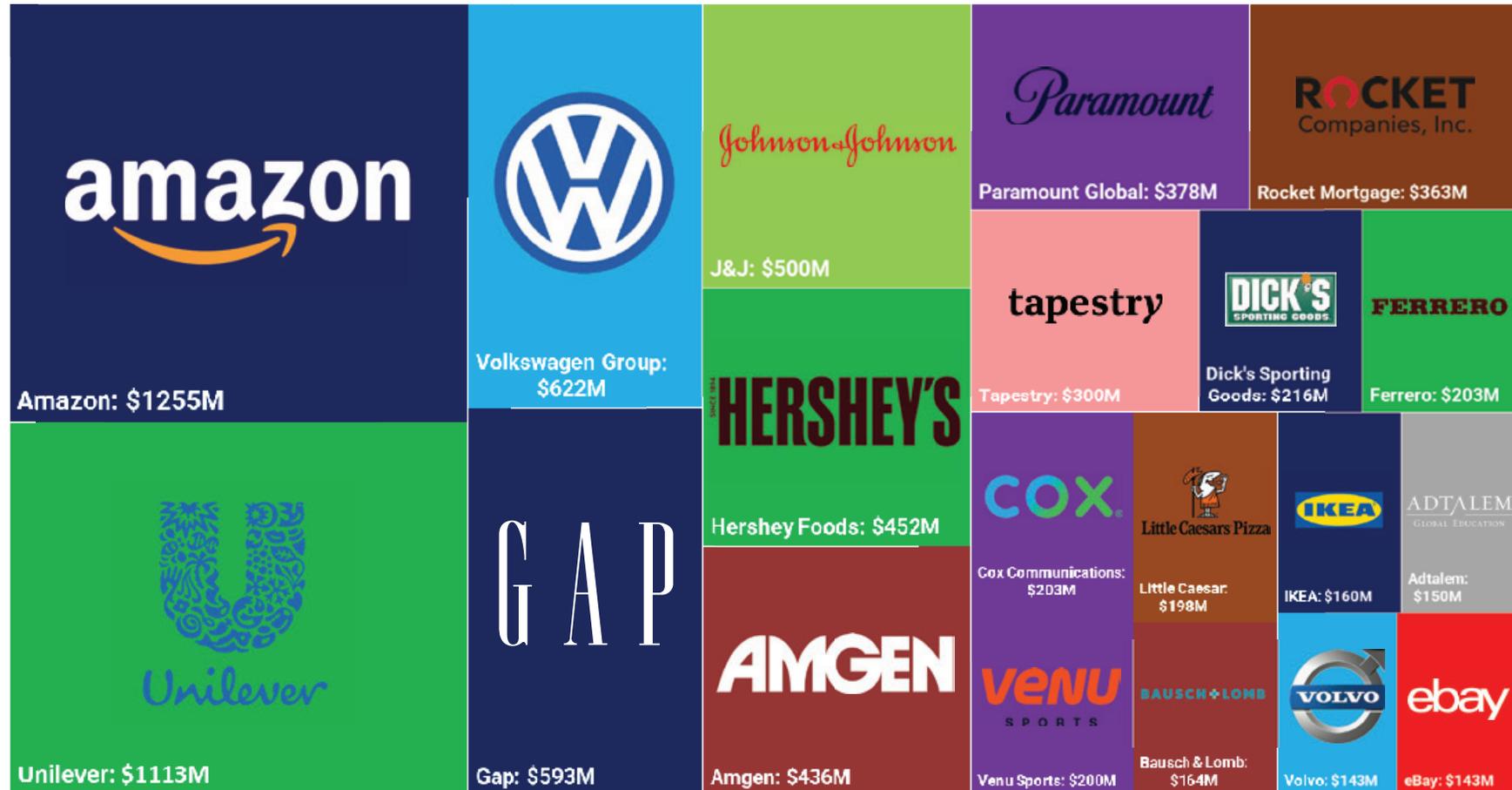


In 2024, **COMvergence** assessed 238 media account moves and retentions in the US, totaling \$12.9 billion, nearly the same volume as that reviewed in 2023 (\$13.1 billion). The 20 largest pitches (spend ≥ \$140 million each) represent 59% of the total spend reviewed during the year, including five whose total net media spend (2024) is greater than \$500 million: Amazon, Unilever, Volkswagen, GAP, and J&J.

In terms of New Business Values (including retentions), Mindshare (retention of Unilever), iProspect (wins of Ferrero and eBay + retention of Cox), and OMD (consolidated win of GAP) recorded the best performance among 60 agencies studied. Conversely, several “Big 6” owned agencies showed an overall negative result including Initiative (loss of Amazon) and UM.

At the group level, Omnicom Media Group (OMG) ranks first in total new business value (including retentions). This is a result of 32 new client wins (\$2.7 billion) including Amazon (\$1.2 billion) and GAP (\$600 million).

The following visual highlights the **top media pitches and moves in the US for 2024**, focusing on those with budgets greater than \$140 million, out of a total media spend of \$13 billion:



- Retail
- Financial & Insurance
- Games, Toys, Gambling
- FMCG (Care)
- Luxury
- FMCG (Food & Soft Drinks)
- Automotive
- Travel, Tourism & Leisure
- Entertainment & Media
- Telecom
- Internet



Per **R3**, in 2024 more than 4,000 creative and media pitches shaped the agency landscape. Publicis Groupe topped the rankings, followed by WPP, Omnicom, Dentsu, and Stagwell in securing major wins.



| Rank | Rank Last Quarter | Holding Group | Estimated Creative YTD Revenue (USD \$m) | Estimated Media YTD Revenue (USD \$m) | Estimated Overall YTD Revenue (USD \$m) | As % of 2023 Revenue | No of Wins |
|------|-------------------|---------------|------------------------------------------|---------------------------------------|-----------------------------------------|----------------------|------------|
| 1 | 1 | | 412.2 | 314.2 | 726.3 | 4.5% | 1,289 |
| 2 | 2 | | 285.3 | 264.3 | 549.6 | 2.9% | 910 |
| 3 | 3 | | 125.7 | 340.8 | 466.6 | 3.2% | 503 |
| 4 | 4 | | 141.5 | 133.7 | 275.2 | 3.6% | 777 |
| 5 | 5 | | 134.5 | 2.1 | 136.6 | 5.4% | 13 |
| 6 | 6 | | 34.0 | 53.9 | 87.8 | 2.8% | 213 |
| 7 | 7 | | 13.3 | 0.0 | 13.3 | 0.1% | 11 |
| 8 | 8 | | 144.7 | -145.2 | -0.5 | 0.0% | 342 |
| | | | | | 2,255 | 2.5% | 4,058 |

Methodology

The R3 New Business League has been compiled since 2002 using data supplied by multinational agencies on a monthly basis to R3.

In addition, this data supplied is balanced against Client Estimates, Nielsen ADEX, discounted to appropriate levels and then converted to a revenue estimate. R3 strives to be accurate in all reporting, but welcomes comments and questions.

Please write to greg@rthree.com or visit media-sense.com for more information or to download a soft copy. R3 is the leading independent consultancy focused on tracking of agency performance, and marketing ROI.

Noteworthy quotes

- » “Don’t chase money. Chase opportunity.” —Sir John Hegarty, Co-Founder and Creative Director, **The Business of Creativity**
- » “Procurement no longer fits under finance. It’s outgrown only doing cost savings. The impact and value has changed.” —Mathew Schulz, Founder, **Matchat**
- » “Now that AI is demonstrating its ability to accomplish not just some, but most of the tasks and activities required to deploy a marketing campaign, migrating to a new revenue model is both a strategic and financial imperative.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “In the realm of marketing, the focus needs to be on value, not price. However, that doesn’t mean that we sign up for a Ferrari when a Mustang will do.” —Kevin McCollum, Manager, Indirect Sourcing Media and Digital Commerce, **The Hershey Co.**
- » “Healthy, fact-based debates foster balanced, well-rounded decisions that ultimately drive the best outcomes.” —Kristi Boyd, Senior Director, **The Coca-Cola Co.**
- » “There must be a balance between value and price, The key to success in marketing procurement is knowing how to manage this conversation.” —Kim Harrison-Johnson, Director, Global Strategic Sourcing Marketing Events and Travel, **LinkedIn**
- » “Procurement offers so much more than just negotiating scopes and finding cost savings.” —Veronica Santiago, Global Commodity Manager, Marketing, **Dell Technologies**
- » “The best way to protect yourself is to build a relationship with your agency where you can ask tough questions and know they are being transparent with you.” —Chris Koehler, CMO, **Twilio**
- » “The big question now is: what are we really paying for? Is it the quantity of assets, or should we shift towards paying for the outcomes those assets deliver? This is where the real value lies, and it’s reshaping how we approach AI and its impact on procurement and beyond.” —Alexey Gorchakov, Strategy and Insight Lead, Global Procurement, **Unilever**
- » “Agency executives make the mistake of assuming their problem is suboptimal negotiating skills; that they need to learn how to better defend their hourly rates. But that’s just getting better and better at doing the wrong thing. The point isn’t to improve how agencies work within the system—it’s to change the system, which means entering compensation discussions with a different, more effective approach.” —Tim Williams, Founding Partner, **Ignition Consulting Group**



- » “Scale still matters, it’s just been redefined. It’s much more about our collective wisdom and intelligence.” —Brian Lesser, CEO, **GroupM**
- » “I’ve had the opportunity now to work on several clients who have moved to deliverables-based remuneration. And I don’t really want to go back to the old way, because frankly, this works so much better. You do not spend any of the time that you spend in the old way, justifying who’s on the business, what their title is, how much they’re paid, either inside the company or to the client. Whereas on an output deliverables based remuneration, you’re talking about the work, what you’re delivering, what you need to deliver.” —Adam Tucker, Global Client Lead (Mondelēz International), **WPP**
- » “Effective advertising demands a balance between creativity and accountability. Yet managing agency spend during the year often feels like navigating uncharted waters.” —Steven Wales, Chief Revenue Officer, **Decideware**
- » “Advertising dollars fuel AI technology and shape its adoption. What we choose to support and create has ripple effects across the entire ecosystem.” —Ariba Jahan, Head of Transformation, North America, **Anomaly**
- » “In an industry where every dollar matters, the synergy of process between the annual SOW, detailed creative brief, and budget reconciliation offers a path to sustainable success.” —Steven Wales, Chief Revenue Officer, **Decideware**
- » “The more that marketers’ ‘gut feeling’ can be backed up by science and data, the better.” —Jake Abel, Head of Marketing Operations, Strategy and Media, **Delta Air Lines**
- » “AI isn’t your cost-cutting savior—it’s your value multiplier.” —Matt Weiss, Founder, **SoulPurpose Advisory**
- » “We’re on the way up, they’re on the way somewhat down.... We’re in the position that we want to be as the challenger holding company.” —Mark Penn, Chairman and CEO, **Stagwell**
- » “It’s a curious fact that the advertising agency industry is one of the only businesses on the planet where the buyer—not the seller—sets the price. Or so most agencies believe.” —Tim Williams, Founding Partner, Ignition Consulting **Group**
- » “Because the big agencies know they are not buying the best inventory for their clients, they don’t want their remuneration to be linked to commercial outcomes.” —Simon Davis, CEO, **Walk-In Media**
- » “Chief marketing officers have to be looking at ourselves as a command center with real-time data.” —Donovan Neale-May, Executive Director, **CMO Council**

- » “There are strong signals that a significant minority of CMOs are looking to reduce their spend with agencies.” —Ewan McIntyre, VP Analyst, Gartner for Marketers, **Gartner**
- » “The future of marketing procurement belongs to the teams that embrace digital transformation and harness the power of AI to drive strategic value.” —Iain Seers, CEO, **RightSpend**
- » “Holding companies are financial holding companies. Their primary mission has always been financial—owning operations that grow, fatten margins, and drive up share prices. They’ve pursued margin increases at any cost, including liquidating talent. That calls into question how dedicated they truly are to helping clients perform better.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “We believe influencer marketing is becoming another media channel.” —Megan Pagliuca, Chief Product Officer, **Omnicom Media Group**
- » “The future of media agency fees lies in finding the right balance between technology investment recovery and value delivery.” —Oli Orchard, Founder, **Fuel Media and Marketing**
- » “Volatility is an invitation to lead boldly, to build trust faster, and to prove creativity’s value beyond the campaign.” —Katie Brown, Director Business Strategy, **Luquire**
- » “Agency CEOs, to date, have acted more like ‘custodians’ of annual budgets than ‘change leaders’ who address today’s complicated industry and strive for long-term, sustainable success.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “Money can’t save bad ideas.” —Emmanuel Orssaud, Chief Marketing Officer, **Duolingo**
- » “Increasingly our compensation models will shift to outcomes.” —Paolo Yuvienco, Chief Technology Officer, **Omnicom**
- » “We’re entering the age of creative compute where value is measured in speed, precision, and impact. The good news is we are not just sourcing partners anymore; we’re designing the future of marketing.” —Ramzi Chaabane, Director, Marketing Indirect Procurement, Advocacy, Influencer and PR Agency Partnerships, **L’Oréal**
- » “If you’re like most firms, GenAI currently shaves somewhere between 20 and 30% off the time it takes to deliver work to your clients. What do you think that figure will be next year, or five years from now?” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “Creative agency services are valued today by ‘man-hours’ of agency time. What happens when AI reduces man-hours by a factor of 10 or 100 or more? Good-bye man-hours! Good-bye agency revenue!” —Michael Farmer, Chairman and CEO, **Farmer & Company**



- » “Adapting, unlearning and relearning is going to be the thing that protects us in this moment.” —Tiffany Rolfe, Global Chief Creative Officer and Chair, **R/GA**
- » “Outcome-based pricing isn’t just a strategy, it’s a commitment to share risk and reward with your customers.” —Scott Woody, CEO and Founder, **Metronome**
- » “Mischief has never done time sheets... We value what we make versus the time it took us to make it.” —Greg Hahn, Co-Founder and Chief Creative Officer, **Mischief**
- » “When you price based on time and effort, faster delivery should mean lower fees. That’s the logical outcome of an effort-based pricing model, and clients aren’t wrong to push for it.” —Brian Kessman, Founder and Principal Consultant, **Lodestar Agency Consulting**
- » “We delivered our first-ever \$100 billion quarter. Five years ago, our quarterly revenue was \$50 billion. Our revenue number has doubled since then, and we are firmly in the generative AI era.” —Sundar Pichai, CEO, **Google**
- » “The agency, not the client, is responsible for managing their costs to protect their bottom line.” —Deb Giampoli, Co-Founder and Partner, **Stone Soup Consultants**
- » “Anything in a true partnership that works to the detriment of one partner ultimately works to the detriment of both partners. The optimal client-agency relationship is one that is mutually connected, collaborative and constructive.” —Greg Paull, President, Global Growth, **mediasense**
- » “AI can take at least 25% of creative agency fees and more than 40% of media agency fees. There is no way that agencies can ‘optimize’ their way out of this situation. New strategies are required.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “Clients and CMOs should know that we are focused on gearing agencies up not just to deliver value, but to reimagine that value. Because we know that business is changing. We know the rules are changing, the expectations are changing.” —Justin Thomas-Copeland, CEO, **4As**
- » “Agencies can’t monetize AI while clinging to outdated pricing models. It’s time to shift from labor and input-based (and even output-based) models to ones focused on outcomes, solutions, and value creation.” —J. Francisco Escobar, President and Founder, **JFE International Consultants**
- » “Over the last year, we’ve introduced something called dynamic, share ownership, where we are co-creating, co-owning and co-accountable for what we do in terms of activities.” —Céline Baudin, Head of Content, Integrated Communications and AI-Enhanced Marketing, **Bayer**
- » “Savings alone are no longer a sufficient proof of value—not for procurement and not for marketing.” —Laura Forcetti, Director, Marketing Services Asia Pacific, and Global Sourcing, **WFA**
- » “To deliver performance improvements, we will position our offering to be much simpler, more integrated, powered by data and AI, efficiently priced and designed to deliver growth and business outcomes for our clients.” —Cindy Rose, CEO, **WPP**
- » “The question isn’t whether creative matters. It’s whether creative agencies can finally build a business model that matches the value they claim to create.” —Craig Elimeliah, CCO, **Code and Theory**
- » “Agencies’ main performance problem is the gap between fees and scope workloads. It’s unconscionable that agencies, who generate a lot of stuff, do not measure the stuff, staff the stuff appropriately and charge for the stuff. Their scopes of work are too large, with too many unnecessary and unproductive deliverables.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “Marketers will no longer buy agency talent to produce concepts. They will buy algorithms that agency talent customizes to create, activate, and scale marketing.” —Jay Pattisall, VP and Principal Analyst, **Forrester**
- » “Marketing procurement can’t (and shouldn’t) do marketing. But they can make your investments stronger, more transparent, more future-proof and easier to defend.” —Laura Forcetti, Director, Marketing Services Asia Pacific, and Global Sourcing, **WFA**
- » “Stop negotiating on cost-per-creative. Start negotiating on performance improvement.” —Jack Smyth, Country Lead, **Jellyfish + Brandtech Group**

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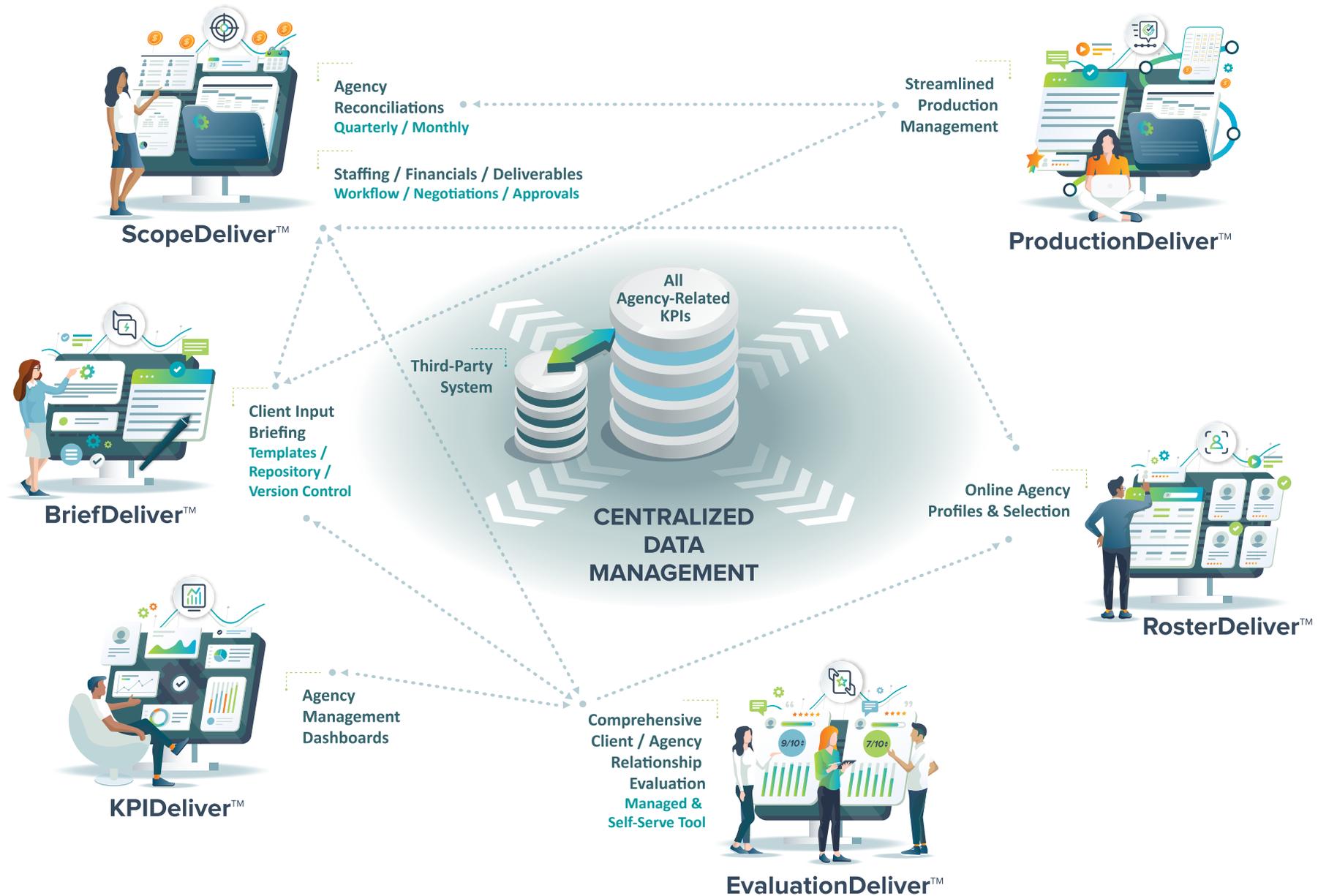
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- Fast and effective selection of qualified partners with the right skill sets. Structured to enable partners to maintain their profile, and clients to provide feedback.
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4As

The 4As (American Association of Advertising Agencies) was established in 1917 to promote, advance and defend the interests of our member agencies, employees and the advertising and marketing industry overall. We empower and equip our members to confidently navigate the ever-changing ecosystem of the agency world. We ensure they remain relevant, are positioned to compete, and have the resources to thrive and grow. Visit aaaa.org for more information.



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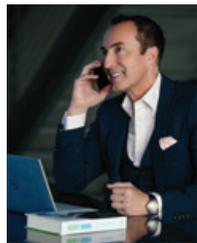
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