

Industry Update

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

March - April 2025 | Volume 81



In this issue:

TALENT



Securing the right talent and resources

The evolving marketing landscape in 2025 is defined by AI advancements, agency restructuring, and shifting consumer engagement trends... [continued on pg. 2](#)

WORK AND PERFORMANCE



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

The top Super Bowl LIX commercials varied across multiple... [continued on pg. 8](#)

FINANCIALS



Driving efficient use of resources

Over the past decade, major mergers and acquisitions have reshaped the advertising industry, with Publicis, WPP, Omnicom, and Dentsu leading... [continued on pg. 11](#)

AGENCY



Agency reviews and roster changes

Tech giant **Adobe** selected Omnicom and its Omnicom Precision Marketing Group as its global marketing AOR for its digital experience and other enterprise... [continued on pg. 18](#)

WHITEPAPER



WHITEPAPER: Media Inflation Report Q1 2025

Contributed by: ECI Media Management

Despite ongoing global uncertainty, media inflation has remained relatively stable across many countries and... [continued on pg. 15](#)

EXECUTIVE SUMMARY: March - April recap

Like everyone else in the advertising industry who was watching the Super Bowl, you were probably wondering: Who will win the USA Today Ad Meter? We all did. February is always about the Super Bowl and its remarkable display of advertising brilliance. Per Fox, Super Bowl LIX set a viewership record with an average of 127.7 million, peaking at 137.7 million during the second quarter. It was the most-viewed Big Game ever. The Super Bowl also reported a record in streaming numbers with 14.5 million viewers. Fox sold 30-second ads for \$8+ million (a record) and generated \$700 million in ad sales (another record).

As for the rest of 2025, AI advancements, agency restructuring, and evolving consumer trends are shaping the marketing landscape. AI investment is surging, with major tech firms committing \$215 billion and agencies integrating AI for creative testing, analytics, and ad performance prediction. Holding companies, such as WPP, Omnicom, Publicis, and Dentsu, are driving M&A activity, with the Omnicom-IPG merger expected to generate \$750 million in cost savings (a standard FTC antitrust review is underway). Amazon's ad revenue soared to a \$69 billion run rate, and Netflix's ad revenue is projected to double to \$4 billion in 2025. Publicis and Omnicom reported solid organic growth, as did Stagwell, while others faced revenue declines or announced restructuring.



As agencies adapt to AI-driven strategies and shifting consumer behaviors, the industry continues to undergo major transformations.

Bruno Gralpois
Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources

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.

• 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 post-consolidation and refine your strategy as needed.

• Per Kantar, **top 2025 marketing trends:**

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|--|---|
| 1) The voyage to total video | 6) Woke and not broke: the inclusion imperative |
| 2) Social media needs to up its game | 7) The puzzle of slowing population growth |
| 3) Safety first: generative AI must reassure marketers | 8) Stretching the limits of innovation |
| 4) Sustainability and marketing must merge | 9) Retail media networks are evolving |
| 5) Brands tap into creator communities | 10) Livestreaming: alive and kicking |

• Per Meltwater, **top 2025 marketing trends:**

- | | |
|--|--|
| 1) AI reshaping content marketing | 9) Reddit, a sleeping giant |
| 2) Increased AI regulation | 10) Peer-to-peer recommendations |
| 3) The booming creator economy | 11) Growing generational divides in social |
| 4) The growing misinformation challenge | 12) Easier data-driven PR |
| 5) Positive reputation management | 13) LinkedIn's continued growth |
| 6) Social media overtakes linear TV | 14) Personalized campaigns now essential |
| 7) Threads going mainstream | 15) Trend jacking to boost reach |
| 8) TikTok huge but facing uncertain future | |

• 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 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%)

- 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)
- 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
- Per The Drum, **top agencies to watch in 2025:**
 - Code and Theory (Stagwell)
 - Unlimited (Accenture Song)
 - The Kitchen North America (Kraft Heinz's in-house agency)
 - Fight or Flight
 - Dept
 - Coolr
 - Hearts & Science
 - Seen Presents
 - AMV BBDO (Omnicom)
 - Ledger Bennett (Havas)
- 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.
- 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
- 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).
- 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.

New agencies or capabilities, restructurings, and reorganizations:

- **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.
- As the merger between Omnicom and IPG approaches, **DDB** restructured its North American agencies, shifting them under a new leadership team, a move that aims to further integrate DDB Chicago, Alma, and Adam&eveDDB, to better serve clients.
- **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.

- 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.
- **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.
- 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.
- 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.”
- **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.
- 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.



Check out our article “**Beyond Innovation: Transforming Partnerships for Lasting Value**” to 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.

AI (artificial intelligence):

- 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.
- **ChatGPT's OpenAI** launched Operator, a general-purpose 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.
- 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.
- 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."
- A group of 1,000 musicians released the silent album ***Is This What We Want?*** on streaming platforms as a symbolic move and protest against UK copyright proposals that could allow AI companies to train models on their work without compensation. Donations or proceeds from playing will go to the charity Help Musicians.
- **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.
- 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.

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- **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.
- 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.
- **Dentsu** launched its Adobe GenStudio Dentsu+, combining Adobe's GenStudio suite with Dentsu's integrated services and the Mercurry 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.
- 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.
- **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.
- 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."
- AI design startup **Flora** secured \$28M 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.
- **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.

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Noteworthy quotes:

- » “In the age of AI, the name of the game is connect or die.” —Arthur Sadoun, Chairman and CEO, **Publicis Groupe**
- » “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 Caloghiris, 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**
- » “At the moment where AI is knocking at every door ... you can’t afford to spend years integrating more of the same for the sake of cost efficiency. You need to focus on innovation, on bringing the best talent, on building new go-to-markets, and basically, on reinventing this industry.” —Arthur Sadoun, Chairman and CEO, **Publicis Groupe**
- » “Before jumping into a pitch, it’s worth asking if a renegotiation could breathe new life into the partnership.” —Donna Malone, Director of Investment EMEA, **ID Comms**
- » “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®**
- » “The AI revolution presents the unique, and perhaps short-lived, opportunity for agencies to change the above dynamics by taking back the reins on how they are to be compensated.” —J. Francisco Escobar, COO, Lakehouse Partners LLC, and Founder, **JFE International Consultants**
- » “We LOVE marketers, and we LOVE agencies. And we LOVE to help them succeed.” —Steve Boehler, Founder, **Mercer Island Group**
- » “We are witnessing the emergence of a new species of marketing leader—one who must be equal parts data scientist, creative visionary, and strategic alchemist, transforming raw information into pure gold.” —Christine Alemany, Fractional Chief Growth Officer, **Most Loved Workplaces®**
- » “When AI does appear in ads, it’s likely to be presented through the lens of practical benefits rather than abstract capabilities. Think less ‘look at this amazing AI technology’ and more ‘here’s how we’re using AI to make your life better.’” —Rob Wrubel, Co-Founder and Managing Partner, **Silverside AI**
- » “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**
- » “AI is a tool. The choice about how it gets deployed is ours.” —Oren Etzioni, Co-Founder, **Vercept**
- » “Where we’ve actually leaned in most recently is in automating a lot of our social and retail media network assets. You can create templates and then just automate them, and what would have taken three weeks to put together you can do in three minutes.” —Gail Hollander, CMO, **The J.M. Smucker Co.**
- » “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**
- » “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 Ruskin, **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**

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



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.

- Per TV measurement firm iSpot.tv, **top 10 Super Bowl LIX commercials (based on "likability")** were:
 - 1) Pfizer: "Knock Out"
 - 2) Doritos: "Abduction"
 - 3) Budweiser: "First Delivery"
 - 4) Booking.com: "Get Your Stay Ridiculously Right"
 - 5) Little Caesars: "Whoa"
 - 6) Rocket Mortgage: "Own the Dream"
 - 7) NFL: "Somebody"
 - 8) Nerds: "Wonderful World of Nerds"
 - 9) Reese's: "Don't Eat Lava"
 - 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"
- 2) Coffee mate "Foam Diva"
- 3) Reese's "Don't Eat Lava"
- 4) Booking.com "Ridiculously Right"
- 5) Dunkin' "DunKings2"
- 6) Nerds "Wonderful World"
- 7) Little Caesars "Whoa!"
- 8) Ritz "Salty Club"
- 9) Bosch "The More You Bosch"
- 10) Hims & Hers "This is America"

Bottom performers were:

- Rocket "Own the Dream"
 - T-Mobile "A New Era in Connectivity"
 - NerdWallet "Genius Beluga"
 - Skechers "Side Hustle"
 - TurboTax "Now Taxes is So Sweet"
 - WeatherTech "Born to be Wild"
 - Tubi "Born to Love Westerns :15"
 - FanDuel "The Dream"
 - NFL "Somebody"
 - 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 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)

- 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.
- **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: \$1M 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.
- 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
- **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.
- **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.
- **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.

Awards:

- Per Ad Age, **top agencies of the year since 2000:**
 - Interpublic's McCann-Erickson (2000)
 - Omnicom's Goodby, Silverstein & Partners (2001)
 - WPP's Ogilvy & Mather (2002)
 - Interpublic's Deutsch (2003)
 - WPP's Berlin Cameron/Red Cell (2004)
 - MDC Partners' Crispin Porter & Bogusky (2005)
 - Omnicom's BBDO (2006)
 - "The Consumer" (2007)
 - Omnicom's Goodby, Silverstein & Partners (2008)
 - MDC Partners' Crispin Porter & Bogusky (2009)
 - Dentsu's mcgarrybowen (2010)
 - indie Wieden+Kennedy (2011)
 - Dentsu's mcgarrybowen (2012)
 - MDC Partners' 72andSunny (2013)
 - WPP's Grey (2014)
 - Interpublic's RGA (2015)
 - indie Droga5 (2016)
 - MDC Partners' Anomaly (2017)
 - indie Wieden+Kennedy (2018)
 - indie Wieden+Kennedy (2019)
 - indie Wieden+Kennedy (2020)
 - Accenture Song's Droga5 (2021)
 - indie Mischief @ No Fixed Address (2022)
 - Interpublic's The Martin Agency (2023)
 - indie Mischief @ No Fixed Address (2024)
- Per **Ad Age 2025 Agency A-List:**

1) Tombras as Agency of the Year	6) Known
2) Mischief @ No Fixed Address	7) Alto
3) Anomaly	8) Majority
4) Highdive	9) 72andSunny
5) Uncommon Creative Studio	10) BBH USA

Other awards included:

- Agency Network of the Year: Ogilvy
- B2B Agency of the Year: Code and Theory
- Best Agency Culture: Hunterblu Media
- Business Transformation Agency of the Year: Gale
- Comeback Agency of the Year: MadWell
- Creative Agency of the Year: Wieden+Kennedy
- Data & Insight Agency of the Year: Known
- Design & Branding Agency of the Year: Collins
- Experiential Agency of the Year: Cartwheel & Co Marketing
- In-house Agency of the Year: Amazon XCM
- Independent Agency of the Year: Terri&Sandy
- Independent Agency Network of the Year: Serviceplan Group
- International Agency of the Year: Rethink

- Media Agency of the Year: OMD
- Multicultural Agency of the Year: IW Group
- Newcomer Agency of the Year: Bandits&Friends
- Performance Marketing Agency of the Year: Wpromote
- Purpose-led Agency of the Year: Oberland
- Social Media/Influencer Agency of the Year: Whalar Group
- Sports/Entertainment Agency of the Year: United Entertainment Group
- Top 3 Production Agencies of the Year: Smuggler, Prettybird, and Love Song
- 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:
 - Automobile: Publicis Conseil, Paris, Jung von Matt AG, Hamburg, AlmapBBDO, São Paulo
 - Entertainment & Leisure: AV Squad, Los Angeles, McCann London, FCB Chicago
 - Finance: McCann Poland, Warszawa, The Leo Burnett Group Thailand, Bangkok, AKQA, Amsterdam
 - Food & Beverages: Rethink Communications, Toronto, FCB New York, LePub (HQ), Milano
 - Health & Beauty: Ogilvy Public Relations Worldwide, New York, Serviceplan Germany, Munich, Ogilvy, London
 - Luxury: DM9DDB, São Paulo, Jung von Matt AG, Hamburg, Marcel, Paris
 - Retail: DAVID, Madrid, VML Grey Colombia, Bogotá, HeimatTBWA, Berlin
 - Tech: TBWA\Media Arts Lab, Los Angeles, Creative X, San Francisco, McCann London
 - Transport & Tourism: Dentsu, Tokyo, Leo Burnett Jeddah, Six Tokyo
- 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.
- **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.
- 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.

Noteworthy quotes:

- » “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**
- » “Agencies help us see the world in a way that we can’t by ourselves.”—Steve Boehler, Founder, **Mercer Island Group**
- » “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**
- » “AI will be a critical tool for content generation and proliferation.”—Abbey Klaassen, Global Brand President, Dentsu Creative, and CEO, **Dentsu Creative US**
- » “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**

FINANCIALS: Driving efficient use of resources



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.

• Per Ad Age, **top deals in the last 10 years that reshaped the advertising industry:**

- February 2015 – Publicis buys Sapient
- September 2015 – Innocean Worldwide and Horizon Media launch Canvas Worldwide
- September 2016 – Dentsu takes majority stake in Merkle
- July 2017 – Vivendi buys majority stake in Havas
- July 2018 – S4 acquires MediaMonks
- August 2018 – Omnicom takes majority stake in Credera
- September 2018 – WPP merges legacy creative and digital shops Y&R and VML
- October 2018 – IPG acquires Acxiom
- November 2018 – WPP merges J. Walter Thompson and Wunderman
- May 2019 – Accenture buys Droga5
- July 2019 – Publicis buys Epsilon
- December 2019 – WPP sells majority stake in Kantar
- October 2020 – Serviceplan Group buys stake in Pereira O'Dell
- August 2021 – MDC Partners and Stagwell merge
- WPP buys AI tech firm Satalia
- September 2021 – Publicis buys CitrusAd, and Plus Company launched
- May 2022 – Publicis buys Profitero
- June 2022 – Dentsu consolidates creative shops under one network
- October 2022 – Interpublic buys 84% stake in RafterOne
- January 2023 – WPP merges media agencies MediaCom and Essence
- May 2023 – Adam&eveNYC and DDB New York merge

- June 2023 – Dentsu buys Tag Worldwide
- October 2023 – Stagwell buys AI-focused Left Field Labs, and Burrell Communications acquired by a private equity firm, breaking from Publicis
- November 2023 – Globant invests in Gut, and Stagwell buys Movers+Shakers
- 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
- March 2024 – Barkley and OKRP merge
- July 2024 – Publicis buys Influential
- September 2024 – Publicis buys Mars United Commerce
- December 2024 – IPG sells Huge to a private equity firm, and Omnicom and IPG announce proposed merger
- January 2025 – Publicis merges Leo Burnett and Publicis Worldwide to form Leo
- 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.”
- **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 back-office 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.
- 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 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 non-social channels”) surpassed \$10 billion in the US in 2025.

- 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 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.
- **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.
- 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.
- **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.
- 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)
- 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.
- 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
- **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.
- **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.
- **World Federation of Advertisers (WFA)** launched a Transparency Tool, in partnership with Ebiquity, 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.

Mergers and acquisitions (M&A) activity:

- **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.
- 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.

- **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.
- **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.
- 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.
- 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.

Holding company financial performance:

- **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%.

- 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.
- 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.
- Interpublic Group (IPG)** 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.

- 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.
- 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)	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)	IPG (NYSE)	\$10.7B	+0.2%	16.6%

- Other noteworthy holding firms: **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.

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. See Q4 2024 rankings below:

Q4 2024

R3 New Business League

Holding Group Ranking




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	Omnicom	125.7	340.8	466.6	3.2%	503
4	4	dentsu	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 www.rthree.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.

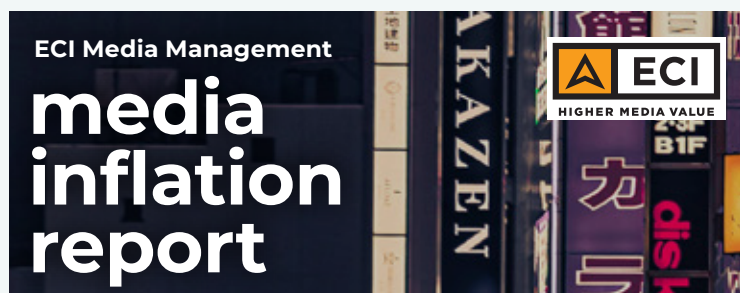
WHITEPAPER: Media Inflation Report Q1 2025 Contributed by ECI Media Management

Despite ongoing global uncertainty, media inflation has remained relatively stable across many countries and regions in Q1.

ECI Media Management's latest annual Media Inflation Report highlights this resilience, offering a detailed look at trends across media channels and markets.

Want to read more?

[Click here](#) for the whitepaper.

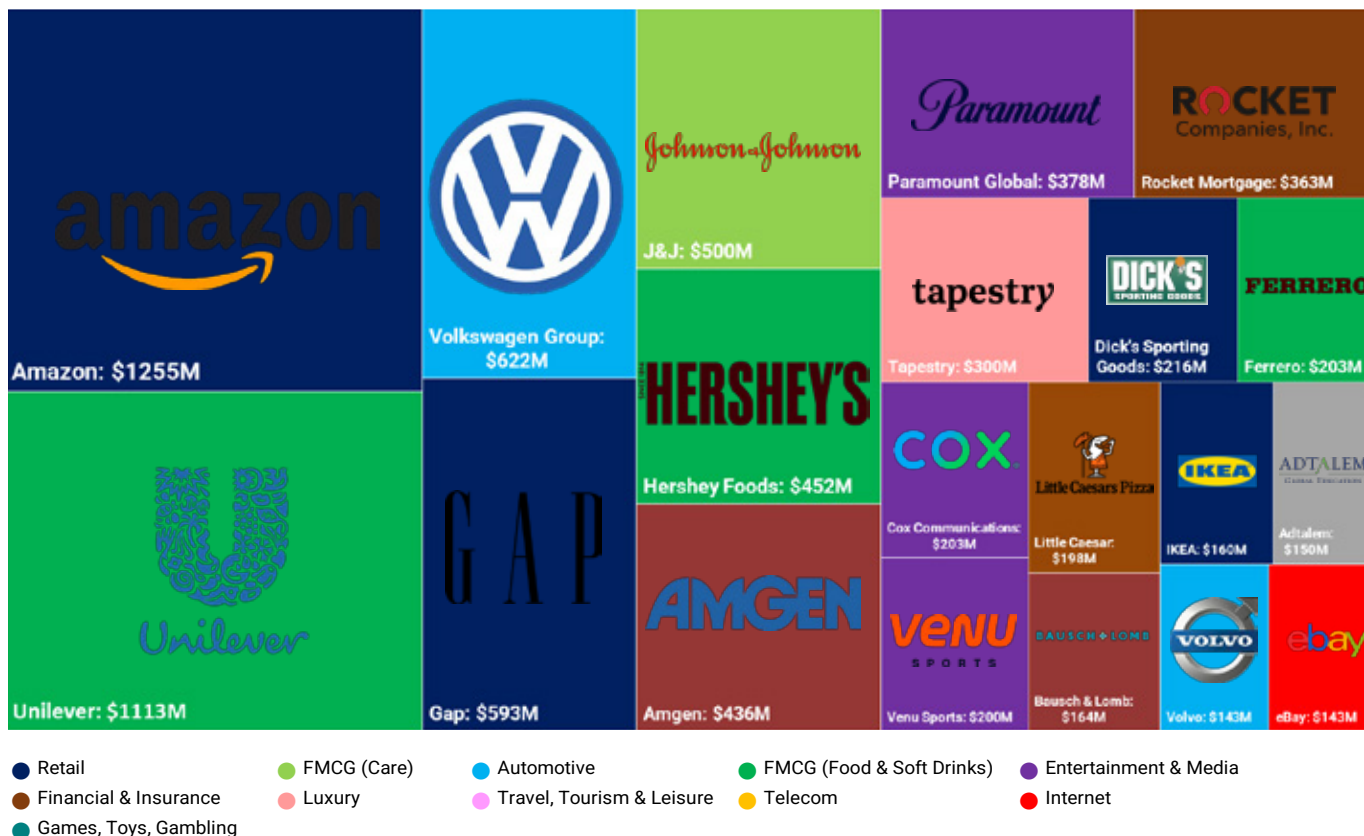


- In 2024, **COMvergence** assessed 238 media account moves and retentions in the US, totaling \$12.9B, nearly the same volume as that reviewed in 2023 (\$13.1B). The 20 largest pitches (spend \geq \$140M each) represent 59% of the total spend reviewed during the year, including five whose total net media spend (2024) is greater than \$500M: 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 (\$2.7B) including Amazon (\$1.2B) and GAP (\$600M).

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:



Need to manage your Agency Roster?

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Noteworthy quotes:

- » “I don’t see the industrial logic of the Omnicom-IPG merger [that] suggests it is a merger of strength. It’s a merger fundamentally of weakness for companies that got too big, and are dealing with too many legacy assets. They’re going to dump thousands and thousands of people back on the marketplace. That provides us with opportunities to pick up first-rate talent.”
—Mark Penn, Chairman and CEO, **Stagwell**
- » “By taking steps to immerse their business practices in AI and then confidently pricing their services to reflect the true value they deliver, agencies can finally shift the dynamics away from the hours to do the work to the results they and their clients have aligned themselves, and thus the success and value they actually provide.”
—J. Francisco Escobar, COO, Lakehouse Partners, and Founder, **JFE International Consultants**
- » “The agencies that fail to evolve won’t just struggle to grow—they’ll struggle to survive.”
—Brian Kessman, Founder and Principal, **Lodestar**
- » “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**
- » “When you approach renegotiation as a true partnership, you set the stage for a relationship that’s not just functional, but inspiring.” —Donna Malone, Director of Investment EMEA, **ID Comms**
- » “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**

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

BRUNO GRALPOIS

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

AGENCY MANIA[™]
SOLUTIONS



AGENCY: Agency reviews and roster changes



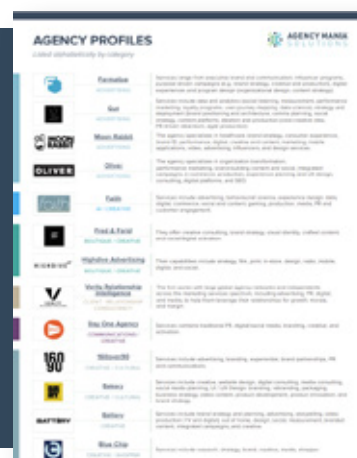
Disclaimer: The reviews listed often capture larger review activity reported in the industry trade press, which we understand to be only a subset of total review activity. Specialist reviews (digital, social, PR, etc.) are rarely reported in the trade press. Also, due to the increasing number of project reviews (versus AOR/retainer reviews), many of those do not receive media attention and therefore are not included here.

- 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.
- **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.
- 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.
- 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.
- **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.
- 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.
- 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.
- 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.
- Online fantasy sports and sports betting company **FanDuel Sportsbook** kicked off a search for a creative partner after parting ways with Portland, Oregon-based independent agency Wieden+Kennedy, its external creative partner for four years. The brand also has an in-house creative team.
- 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.
- Insurance giant **Geico** kicked off a review of its creative business in a move to expand its creative roster. Incumbent The Martin Agency has been Geico's creative AOR for 31 years and is expected to defend along with other IPG agencies. In 2023, Geico selected IPG Mediabrands as its media AOR, consolidating creative and media under the same holding company, ending the brand's 25-year relationship with independent Horizon Media.
- 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.
- 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 P1T Crew. BBH USA serves as the creative lead in the bespoke team.

- **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.
- **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.
- International brewer **Heineken** extended its global media services relationship with Dentsu for two more years. The media AOR will handle more than 100 markets and now also includes customer experience, production, and creative support services.
- **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.
- **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).
- 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.
- 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.
- 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.
- Volkswagen Group-owned and German sports car maker **Porsche** kicked off a review of its creative business in the US as part of its review cycle. Incumbent Chicago-based Cramer-Krasselt retained Porsche's US business in 2013 and 2020 and is expected to defend.
- 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.
- Footwear company **Red Wing Shoe Co.** selected Minneapolis-based social marketing agency The Social Lights as its social AOR.
- Retailer **Sam's Club** kicked off a review of its creative and media business. Incumbents Arnold and Horizon Media are expected to defend.
- Sandwich chain **Subway** kicked off a review of its creative, advertising, and paid media in the US as part of a regular business review. Eight-year incumbent Dentsu and its integrated team, which includes Carat, for media is expected to defend.
- 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.
- 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.
- **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.
- 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.

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Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Adobe (Adobe Experience Manager, Adobe Target, Adobe Experience Platform)	Unk	Marketing AOR	Global	Omnicom	Y
	Alaska Air Group	Unk (consolidation)	Strategy & Creative AOR	Unk	Mekanism	Unk
		Unk (consolidation)	Media Planning & Buying	Unk	Universal McCann	Unk
	Black Viking Brewing	Unk	Creative AOR	US	Notorious111	Unk
	Bob Evans Farms	None	Media Planning & Buying AOR	Unk	Colle McVoy	Y
	Breeze Airways	None	Creative AOR	Unk	Walrus	N
	Brooks Running	None	SEO AOR	EMEA	Assembly (expanding work)	Y
	Captain D's	Unk	Creative AOR	US	Doner	Y
	Casper's Ice Cream	Unk	Creative AOR	Unk	TDA Boulder	N
	The Coca-Cola Company	WPP	Media AOR	US, Canada	Publicis Groupe	Y
	Cracker Barrel Old Country Store	Unk	Public Relations, Experiential Marketing & Partnerships AOR	Unk	Blue Engine	Unk
		Unk	Brand AOR	Unk	Prophet	Unk
		Unk	Social Media AOR	Unk	Viral Nation	Unk
	Electronic Arts	T&Pm	Media AOR	Global	GroupM	Y
	Eli Lilly	Unk	Social AOR	Various	R/GA	Y
	FanDuel Sportsbook	Wieden+Kennedy	Creative	US	IP	Y
	Fidium Fiber	Unk	Creative AOR	Unk	Bray & Co.	Y
		Unk	Media AOR	Unk	Novus	Y
	Geico	The Martin Agency, other IPG agencies (expected to defend)	Creative	Unk	IP	Y
	Generali	Unk	Strategic & Creative AOR	Global	VML	Y
	Goodyear Tire & Rubber Co.	GSD&M, Colle McVoy, various others (consolidation)	Integrated AOR	Global	Publicis Groupe	Unk
	Groupe SEB USA (All-Clad, Rowenta, and T-Fal)	Unk	Creative AOR	US	Day One Agency	Unk

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IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Hearst	Unk	Creative & Media AOR	Unk	PMG	Y
	Heineken	None	Media	Global	Dentsu (expanding work)	Unk
	Hertz Global Holdings	FKQ (retains media planning & buying duties)	Creative AOR	Unk	Preacher	Y
	Manchester City Football Club	Unk	Digital Business Transformation AOR & Partner	Global	Publicis Sapient	Unk
	Mini	Anomaly	Lead Creative AOR	International	Jung von Matt Group	Y
	Nature's Bakery	Unk	Creative AOR	Unk	Zambezi	Y
	Pacífico	Ogilvy	Creative AOR	Unk	Day One Agency	Y
	Pandora	Unk (consolidation)	Media AOR	Global	Dentsu	Unk
	Porsche	Cramer-Krasselt (expected to defend)	Creative	US	IP	Y
	Publix Super Markets	22Squared (retains media duties)	Creative AOR	Unk	Fig	Y
		None	Media AOR	Unk	22Squared (retains media duties)	Y
	Red Wing Shoe Co.	Unk	Social AOR	Unk	The Social Lights	Unk
	Sam's Club	Arnold, Horizon Media (expected to defend)	Creative & Media	Unk	IP	Y
	Subway	Dentsu (expected to defend)	Creative, Advertising, & Paid Media	US	IP	Y
	Visa	Wieden+Kennedy	Brand Campaigns	Unk	Anomaly	Unk
	Wall's	Unk	Creative AOR	UK, LATAM, various others	180 Amsterdam	Y
	Warner Bros. Discovery	Unk	Media AOR	Various APAC	Hearts & Science	Y
	Whole Earth Foods	Unk	Lead Creative AOR	Unk	St Luke's	N

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A word about the author: Bruno Gralpois is a globally recognized thought leader in business partnerships, renowned for his pioneering work in establishing agency management as a critical discipline among the world's largest advertisers and Fortune 500 companies. As the author of the industry-defining book *Agency Mania* and the co-founder of Agency Mania Solutions, a leading cloud-based software company, Bruno has dedicated his career to fostering successful client-agency relationships. His expertise, honed through leadership roles at Microsoft, Visa, and several pre-IPO software companies, has made him an authority on building and nurturing high-impact business partnerships. In addition to his corporate achievements, Bruno is a key Faculty member at the Association of National Advertisers (ANA) School of Marketing, where he continues to shape the future of client-agency collaboration, driving growth and sustained business performance.

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

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