

Industry Update

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

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EXECUTIVE SUMMARY: May - June recap

Surprise. AI continues to dominate conversation at the intersection of technology, consumer trends, and business transformation.

From headline-grabbing controversies to escalating legal battles over copyrighted content used for training models, the boundaries of responsible and practical AI are being tested in real time. Yet AI's role in marketing is expanding rapidly, requiring us to discern reality from fiction and invest our time and efforts carefully.

Against this backdrop lies a sobering reality: economic uncertainty. Trade tensions and global instability are prompting agencies and holding companies to double down on strategic resilience by restructuring their operations and reassessing client strategies and budget forecasts. Brands are building contingency plans. They are conducting reviews to ensure they have the right partners for growth.

The path forward demands both innovation and intentionality—where data, creativity, and agility align to create meaningful, future-ready marketing.



Bruno Galpois

Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources



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?

- Per the Association of National Advertisers (ANA) and the American Association of Advertising Agencies (4A's), **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 **World Federation of Advertisers (WFA)** 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 postproduction. 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.
- 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.
- 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.
- 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.
- 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
- 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.
- 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

- **Carat US** launched its Cultural EQ measure, a proprietary score that gauges brands' influence and effectiveness within culture. Carat describes Cultural EQ as an even stronger predictor of brand interest than media spend alone, providing clients with critical insights into their cultural influence in the market.
- **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.
- Kraft Heinz's Toronto- and Chicago-based internal agency **The Kitchen** expanded its scope to include Kool-Aid, Jell-O, and Crystal Light. For flagship brands, The Kitchen's remit is limited to social media, complementing the work done by external agencies such as Wieden+Kennedy and Mischief. The in-house agency, which produces assets for TV, social, and other mediums, is hiring copywriters, art directors, social media insights analysts, and content creators to join its 170+ employees.
- **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 conceiving, producing, and developing creative marketing across company brands, Walt Disney Studio banners, and Disney+.
- Per Jeffries Consulting, **top agency challenges as related to traditional pitches:**
 - 1) Agencies spend \$75K–\$150K chasing \$2M–\$4M 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).
- Per a study by **Advertiser Perceptions**, and commissioned by the Association of National Advertisers and 4A's, a typical agency review takes two to three months and costs a combined \$1 million for both marketers and agencies.
- 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?
- **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.
- **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.
- 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."

New agencies or capabilities, restructurings, and reorganizations:

- 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.
- 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.
- 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.

- **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.
- 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.
- **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.



Read our article **“If My Agency Uses AI, Am I Overpaying?”** 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.

- 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.
- 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.
- 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.
- **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.
- **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.
- 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.
- **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.
- 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, Fiddler, 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.
- 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

AI (artificial intelligence):

- 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.

- **L'Oréal Groupe** deployed Google's Imagen 3 and Gemini multimodal models as part of its generative AI beauty content lab, dubbed Creaitech, 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.
- 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)
- **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.
- **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.
- 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.
- **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.

Noteworthy quotes:

- » "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**
- » "It's not Artificial Intelligence, it's Intelligence Amplification." —Matt Weiss, Founder, **SoulPurpose Advisory**

- » "Marketing will become more imaginative and less operational, more about magic and less about implementation." —Tom Goodwin, Keynote speaker and consultant, **TomGoodwin.co**
- » "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**

- » “Celebrate the various approaches—from bespoke boutiques to global platforms—because breadth of thinking is a competitive superpower.” —Marla Kaplowitz, President and CEO, **4A's**
- » “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**
- » “We should reject calls for text and data mining exceptions that would create sweeping copyright exemptions, allowing AI to train on copyrighted works without the consent of rights holders.” —Horacio Gutierrez, Senior Executive VP and Chief Legal Officer, **Disney**
- » “Innovating at the speed of culture also means reimagining client relationships. How we work with clients is just as crucial as our internal processes.” —Steven Panariello, CEO, **BBH USA**
- » “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**
- » “We depend on intimate relationships to build our brands and businesses. The foundation is energy exchange.” —Dan Eisenberg, CMO, **Blue Chip**
- » “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**
- » “If you're part of a 500,000-person payroll company and you're building the AI for that company, would you not be afraid that you're going to lose your job if the AI does its job right?” —Ashish Toshniwal, Founder, **10kR**
- » “The most effective agency-client relationships transcend traditional boundaries and allow for honest conversations.” —Steven Panariello, CEO, **BBH USA**

- » “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**
- » “In-house teams have evolved—they've grown up, leveled up, and many rival external agencies in both creative output and strategic thinking.” —Jennifer Harrington, CEO and Founder, **Hatch**
- » “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**
- » “We can, and should, use AI in this process. But when everyone has access to the same tools, our real value is in what we uniquely bring to them.” —Greg Hahn, Co-Founder and Chief Creative Officer, **Mischief @ No Fixed Address**
- » “Before we think of hiring somebody, we are asking questions: ‘Can this be done via an agent, machine, AI workflow or not?’” —Ashish Toshniwal, Founder, **10kR**
- » “The brands that win won't be the ones who pick the right agency vs. in-house model—they'll be the ones who can find, attract, and assemble the right people.” —Jennifer Harrington, CEO and Founder, **Hatch**
- » “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, **4A's**
- » “Today's clients need to move at lightning speed, stretch their budgets further, and stay culturally relevant in an ever-changing landscape. That's exactly what independent agencies do best.” —Michael McIntyre, CEO, **MOCEAN**

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



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.

• 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

• Per Kantar BrandZ's **2025 Most Valuable Global Brands**, the top 10 are:

- | | |
|--------------|---------------|
| 1) Apple | 6) Facebook |
| 2) Google | 7) Instagram |
| 3) Microsoft | 8) McDonald's |
| 4) Amazon | 9) Oracle |
| 5) Nvidia | 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 (APR) 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.
- 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.
- 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."
- 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 **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, preproduction, production, postproduction, and delivery.
- 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

- 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 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.

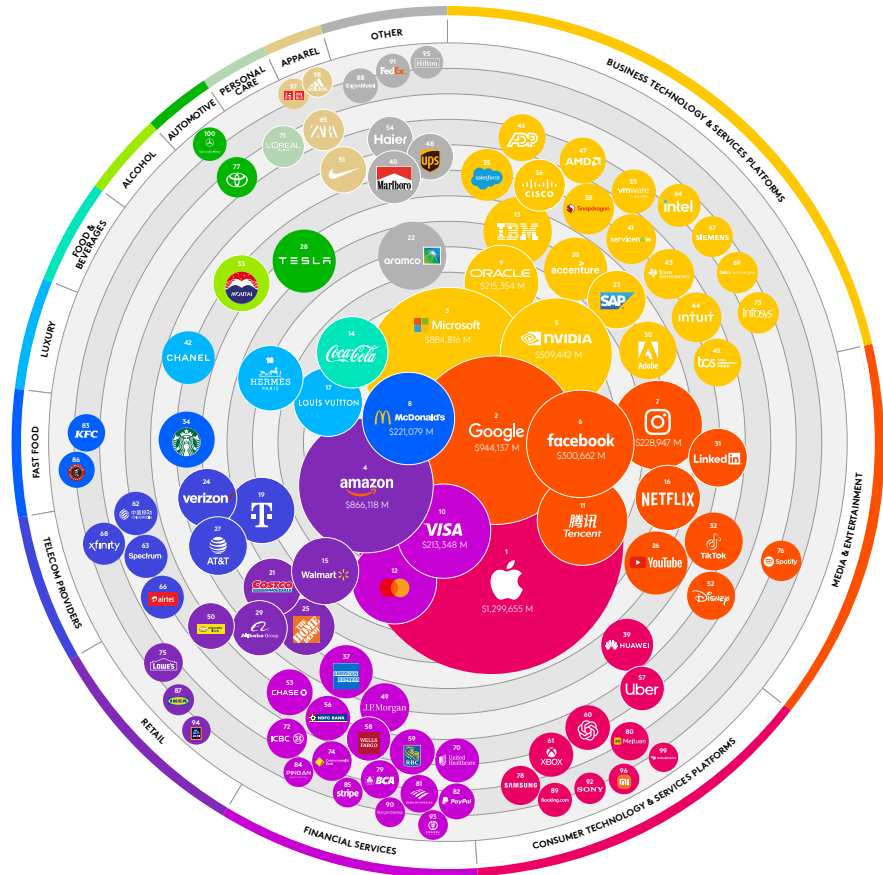
Awards:

- 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.
- 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.”
- Per Fast Company, **top 15 most innovative companies in advertising and marketing:**
 - 1) Liquid Death (brand collab)
 - 2) Superconnector Studios (fun brand work)
 - 3) Airbnb (epic marketing)
 - 4) NewsLab (fun tourism ad)
 - 5) Johannes Leonardo (basketball sneaker ads)
 - 6) McCann Worldgroup (Xbox)
 - 7) Wieden+Kennedy (Caitlin Clark/WNBA)
 - 8) Saucony (“the Marathumb Challenge”)
 - 9) New York Liberty (WNBA champion and mascot)
 - 10) Yeti (artful branded content)
 - 11) FCB (F1 and Michelob Ultra)
 - 12) The Martin Agency (Snoop Dogg collab)
 - 13) Nutter Butter (social brand strategy)
 - 14) TBWA\Worldwide (CollectiveAI platform)
 - 15) Uncommon Creative Studio (New York City campaign)
- **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).
- Per **Ad Age Creativity Awards 2025**, top winners included: Chili’s Grill & Bar (Brand of the Year), Duolingo (Best Brand Social Media Presence), Bark “Bark Air” (Best Brand/Product Launch of the Year), Coors Banquet x Wrangler “Beer Wash Jeans” (Best Partnership/Collaboration of the Year), Chili’s Grill & Bar (Best ROI: Work that Works), Adidas “Hey Jude” (Best Use of Music), O2 “Scambaiters” (Best Use of AI), PetPace “Animal Alerts” (Tech Innovation of the Year and Creative Data Campaign of the Year), Heineken “Pub Museums” (Best B2B Campaign of the Year), NHS Blood and Transplant “Waiting to Live” (Experiential Campaign of the Year), Nutter Butter, “Nutter Butter, You Good?” (Social Campaign of the Year and Best Use of TikTok), Vaseline “Transition Body Lotion” (Best Work for Good: Brand), The Prison Library Project “Contrabanned” (Best Work for Good: Pro Bono/Nonprofit), Xbox Football Manager 2024 “The Everyday Tactician” (Branded Entertainment/Content Campaign of the Year), British Airways “Windows” (Print/Design/Out-of-Home Work of the Year), Nike “Am I a Bad Person” (Film/TV/Video of the Year), McDonald’s “McDonald’s” (Craft of the Year: Print/Design/Out-of-Home), Spotify “Spreadbeats” (Craft of the Year: Digital/Tech), Apple “Flock” (Craft of the Year: Film), Facebook “Yes, Couch!” (Tiny but Mighty), CeraVe “Michael CeraVe” (Campaign of the Year).
- **2025 Clio Awards** winners included: Spotify and JCDcaux, 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. JCDcaux 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.

2025 Most Valuable Global Brands

Kantar 2025

	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
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



	Brand Name	Value (US \$M)
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	UnitedHealthcare	35,238
71	L'Oréal Paris	35,090
72	ICBC	33,915
73	Infosys	33,096
74	CommBank	32,093
75	Lowe's	30,859
76	Spotify	29,687

	Brand Name	Value (US \$M)
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
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:

- » “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**
- » “By staying agile, fostering innovation and maintaining a deep respect for the creative process, we can produce work that doesn’t just capture attention—it touches hearts and minds in meaningful ways.” —Steven Panariello, CEO, **BBH USA**
- » “Ultimately, advertisers that see AI as a productivity tool alone will miss out on its strategic potential. The biggest gains will go to those who recognize AI as a catalyst for better thinking, more collaborative partnerships, and new ways to measure success.” —Jay Friedman, CEO, **Goodway Group**
- » “We’re moving into a world with fewer agencies and more agents.” —Henry Cowling, Chief Innovation Officer, **Monks**
- » “We see countless AI enthusiasts drifting near the industry, thinking advertising is just words on pictures or that marketing is just endless optimization of optimization.” —Tom Goodwin, Keynote Speaker and Consultant, **TomGoodwin.co**
- » “Agencies are paid for their opinions, and offering them with honesty and directness should never be out of scope.” —Steven Panariello, CEO, **BBH USA**
- » “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**
- » “We’re not going to have annual review processes, because feedback happens in real time and feedback delayed is feedback denied.” —Ajaz Ahmed, Partner, **Studio.One**
- » “Creativity is the new productivity.” —Shantanu Narayen, Chair and CEO, **Adobe**
- » “Creativity isn’t a luxury. It’s a growth strategy.” —Erik Wahl, Artist, Author, Speaker, and Entrepreneur
- » “Stand on your own strengths, invite partnership and let others do the same. When the industry wins, everyone wins.” —Marla Kaplowitz, President and CEO, **4A’s**
- » “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**

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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.

- 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.
- 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%).
- 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.
- Trump's tariffs led experts to predict an 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.
- 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.
- Per the Interactive Advertising Bureau (IAB), **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 year-end. Digital video advertising surpassed linear TV last year. CTV advertising will reach \$26.6 billion in 2025.
- **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.
- **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.
- 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 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).
- **Stagwell** reported \$2.3B in net revenue in 2024, for 12% growth YOY with \$382M in new net business (a 41% increase YOY) and EBITDA of 14%, or \$411M. 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), Consulum (strategic communications), and Unicepta (media monitoring). The average size of top 25 clients was \$25M.

- 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 (\$5B in revenue, \$1B in adjusted EBITDA)
 - 5) Committed to \$80M to \$100M in cost savings through AI
- 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 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%.
- Packaged goods giant **Unilever** intends to spend 50% of its media budget on social channels and will increase influencer marketing investment twentyfold in a move to build an integrated machine for content creation and advocacy.
- **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 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).
- 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)
- 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 \$129.8bn, deal value excluding mega-deals (deal value >\$10bn) surged 47% to \$63.8bn, 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: high interest rates and capital deployment; AI and automation driving investment; data privacy and first-party data strategies; and shifts in consumer and advertiser behavior.
 - 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.
 - Per **MediaSense's R3**, Publicis Groupe is leading in number of accounts won by a holding company in global creative in Q1 2025, with \$110M 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 \$80M across 176 accounts (also about \$500K on average per account), mostly led by PHD, OMD, and Hearts & Science. Omnicom is followed by Publicis Groupe.

- 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.
 - 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 postproduction 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.
- Mergers and acquisitions (M&A) activity:**
- 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).
 - 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."
 - 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.
 - 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.
 - 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.

ARTICLE: 10 Things to Know about the US TV Landscape in 2025 Contributed by ECI Media Management

As traditional TV continues to cede ground to streaming platforms, the 2025 Upfronts highlighted just how rapidly the media landscape is evolving.

From AI-powered tools to the growing influence of live sports and retail media in CTV, advertisers are being presented with new opportunities and challenges.

Want to read more about the 10 key insights surrounding the U.S. TV landscape in 2025?

Click here for the article.



- 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** 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.

Holding company financial performance:

- For the quarter ending March 2025, **WPP** reported revenue of £3.2B (\$4.3B), 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 \$700M North America media account to Publicis. WPP is defending its share of the \$2.4B Mars business and PayPal's \$130M 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.
- **Publicis Groupe** reported revenue of 3.5B euros (\$4.6B) 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 €500M (\$560M) 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.
- **Omnicom Group** reported revenue of \$3.7B, 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 (IPG)** reported total revenue of \$2.3B 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

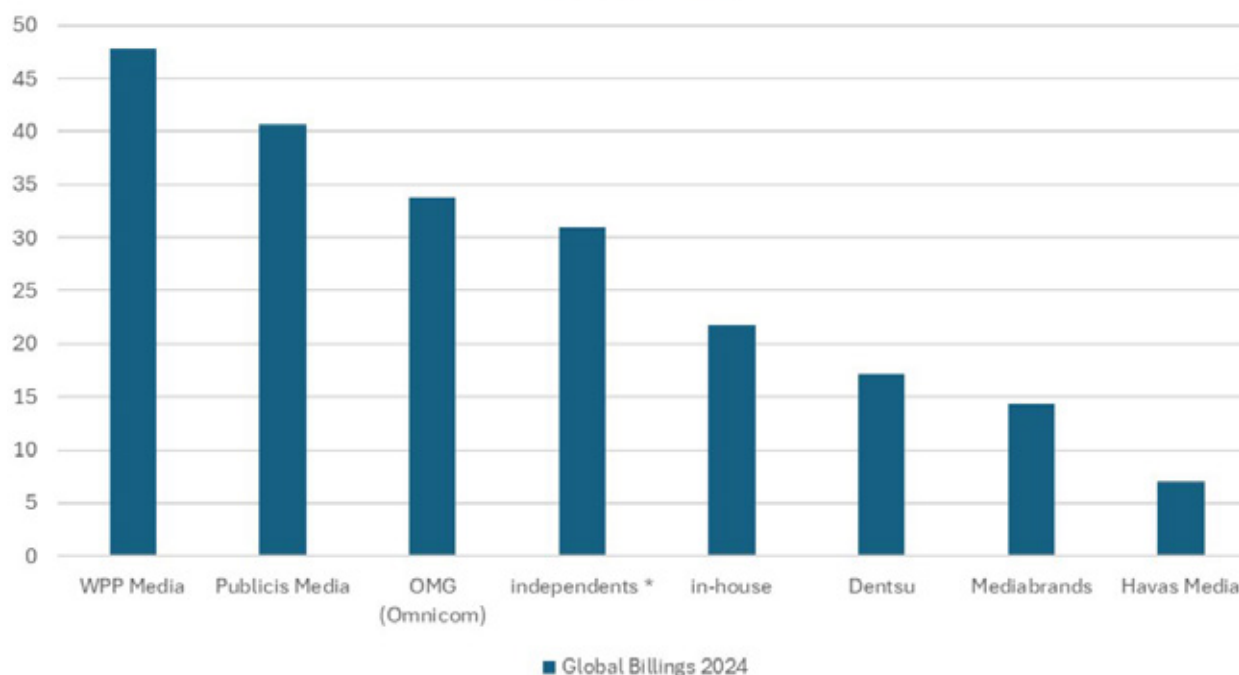
- To recap **Q1 FY25** results of the top 4 holding companies:

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)	IPG (NYSE)	\$2.3B	-3.6%	9%

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 \$214B, 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 \$47.8B, followed by Publicis Media (\$40.6B); OMG (\$33.8B), whilst Independent agencies (not part of the Big 6) handled \$31B from the Global Advertisers total spend.



Noteworthy quotes:

- » “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**
- » “It’s time to move beyond seeing AI as a cost-cutting machine and instead view it as a strategic partner that can elevate the entire marketing ecosystem. If you’re not preparing for this now, you’re already behind.” —Jay Friedman, CEO, **Goodway Group**
- » “As AI technology continues to evolve, fee structures must remain dynamic, reflecting both the reduced human resource requirements and the increased value of sophisticated planning capabilities.” —Oli Orchard, Founder, **Fuel Media and Marketing**
- » “The AOR world is not over, but it’s no longer growth. We’re focused on more consultative, creative, project-based models, including commercial models like deliverable and outcome-based pricing.” —Daryl Lee, CEO, **McCann Worldgroup**
- » “By managing marketing supplier contracts effectively and transparently, procurement teams can ensure complete visibility, governance, and compliance across all agency relationships—creating a strong foundation for long-term, mutually beneficial partnerships.” —Stephen Broderick, Global Clients, **Media Marketing Compliance**
- » “We’re not having timesheets because they’re completely unnecessary and ideas aren’t built by the hour.” —Ajaz Ahmed, Partner, **Studio.One**
- » “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**

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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.

- **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.
- Online banking company **Ally Financial** kicked off a review of its creative roster. Stagwell's Anomaly is expected to remain the bank's lead creative and strategy agency. The new agency or agencies will partner with its media AOR, WPP's EssenceMediacom, its multicultural AOR, Translation, and its CRM AOR, R/GA.
- **American Express** kicked off a review of its creative business in the US, including sports and experiential marketing. Incumbent Dentsu (since 2017) is expected to defend. The selected agency will partner with IPG's UM, the brand's global media AOR.
- **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.
- Inspire Brands-owned fast-food sandwich chain **Arby's** kicked off a review of its creative business. Incumbent Publicis Groupe agency Fallon is expected to defend. The agency will partner with the brand's media AOR, Publicis Groupe.
- Liquor giant **Bacardi Limited** kicked off a global creative review across its entire brand portfolio comprising Bacardi Rum, Bombay Sapphire Gin, Martini, Dewar's, St-Germain, and others. Eleven-year incumbent Omnicom's BBDO is expected to defend. BBH USA is expected to maintain creative duties for Grey Goose and Patrón.
- German agricultural and pharmaceutical giant **Bayer** kicked off a review of its global creative and media consumer health business (e.g., Claritin, Aleve, Alka-Seltzer). Incumbent agencies—WPP's EssenceMediacom on media and Interpublic Group of Cos.' MullenLowe and Omnicom Group's BBDO on creative (among others, including Klick Health)—are expected to defend.
- 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.
- 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.
- Women-first online dating company **Bumble** kicked off a review of its global creative business. The brand hasn't recently worked with creative agencies, instead relying on its in-house studio. The agency will partner with WPP's VML and entertainment marketing shop FlyteVu.
- 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.
- **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.
- **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.
- Ann Arbor, Michigan-based **Domino's Pizza** extended its contract with Boulder, Colorado-based independent agency WorkInProgress as its creative AOR through 2027. The agency handles strategic and creative duties and social media. The agency will continue to partner with the brand's media AOR, GroupM's Mindshare.
- 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.
- 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.
- Ecofriendly 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.
- 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).

- 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.
- Reynolds Consumer Products's **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.
- 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.
- **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."
- 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.
- 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.
- 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.
- 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.
- National home-improvement retailer **Lumber Liquidators** selected Pinnacle Advertising as its integrated AOR. The agency will handle integrated marketing, media, and advertising solutions.
- Lenovo-owned smartphone maker **Motorola** kicked off a review of its global creative business in a move to consolidate work currently handled by several agencies, including independent boutiques.
- 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.
- 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.
- 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.
- 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.
- 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.
- **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.
- 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.
- Financial tech company **PayPal** kicked off a review of its global media business, including its PayPal and Venmo entities. WPP served as the brand's global media AOR in 2023, but WPP recently resigned the account. The agency will partner with creative AOR Publicis Groupe, led by BBH USA.
- **PepsiCo** moved some of its in-house content studio duties to VaynerMedia in a move to leverage the combined marketing and advertising strengths of its digital platforms. The brand will continue to work with a variety of roster agencies, such as TracyLocke, Motive, Alma, OMD, ACC, and BBDO.
- 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.

- 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.
- 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.
- 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.
- 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.
- 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.
- 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).
- Premium cable network **Starz** selected independent Horizon Media as its media AOR following a review, replacing incumbent Canvas Worldwide.
- 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.
- 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).
- TJX Cos.**, the parent company of chains including TJ Maxx, kicked off a review of its media agency business as well as creative pitches for two of its brands (HomeGoods and Sierra Trading Post). Incumbent WPP media agency Mindshare is expected to defend. The agency has managed TJX's brands in the US since 2017, including TJ Maxx, Marshalls, HomeGoods, and Sierra Trading Post. Incumbent creative AORs Interpublic Group of Cos.' McCann and Omnicom Group's adam&eveDDB are expected to defend. McCann New York remains TJ Maxx's creative AOR.
- 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 full-funnel 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.
- 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.
- 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.

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Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Abbott Laboratories	Mindshare (consolidation)	Media	US, Canada	Spark Foundry	Y
	Ally Financial	Anomaly (expected to maintain duties)	Creative	US	IP	Y
	American Express	Dentsu (expected to defend)	Creative	US	IP	Y
	American Honey Whiskey	Unk	Creative AOR	Unk	Someoddpilot	Y
	Arby's	Fallon	Social Media AOR	Unk	Tombras	Y
	Arby's	Fallon (expected to defend)	Creative	Unk	IP	Y
	Bacardi Limited	BBDO (expected to defend)	Creative	Global	IP	Y
	Bacardi Limited (Grey Goose, Patrón)	BBH USA (expected to maintain duties)	Creative	Global	IP	Y
	Bayer (Consumer Health brands)	EssenceMediacom, BBDO, various others (expected to defend)	Creative & Media	Global	IP	Y
	Beyond Yoga	Unk	Integrated AOR	Unk	Shadow	Unk
	Beyond Yoga	Unk	Media AOR	US	UM	Y
	Bread & Butter Wellness	Unk	Creative AOR	Unk	Argonaut	Unk
	Bumble	None/In-House	Creative	Global	IP	Y
	Carmax	The Martin Agency	Creative AOR	US	72andSunny LA	Y
	Carmax	Dentsu X (expected to defend)	Media	US	IP	Y
	Coca-Cola Co.	None	Marketing	Global (excludes NAM)	WPP	Unk
	Dollar General	Unk	Paid Media AOR	Unk	iProspect	Y
	Domino's Pizza	None	Creative AOR	Unk	WorkInProgress	Y
	Dos Equis	BBDO	Creative AOR	Unk	LePub	Unk
	7-Eleven	Dentsu	Media AOR	Global	UM	Y
	Earth Breeze	Unk	Media AOR	Unk	Mile Marker	Y
	Earth Breeze	Unk	Creative AOR	Unk	Terri & Sandy	Y
	El Pollo Loco	Organic	Creative AOR	Unk	Innocean USA	Y
	Finance of America	Unk	Creative AOR	Unk	David&Goliath	Y
	Hefty	DDB	Integrated AOR	Unk	McCann	Y
	Hero MotoCorp	Unk (consolidation)	Media	Unk	EssenceMediacom	Y
	Hyatt	Unk (consolidation)	Media AOR	Global	Assembly	Y
	Ikea US	Ogilvy New York	Creative AOR	US	David	Y
	Ikea US	Ogilvy New York	Multicultural	US	Alma	Y









Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Instant Pot Brands	Unk	Creative-Media AOR	Unk	Cramer-Krasselt	Y
	Ionna	Unk	Creative AOR	Unk	VML	Y
	Jordans Furniture	None	Creative AOR	Global	MullenLowe US	Y
	LinkedIn	Dentsu (consolidation)	Media	Global	Publicis Media	Y
	Lumber Liquidators	Unk	Integrated AOR	Unk	Pinnacle Advertising	Unk
	Motorola	Various agencies (consolidation)	Creative	Global	IP	Y
	Narcan Nasal Spray	Unk	Media AOR	Unk	Mile Marker	Y
	National Vision	Unk	Media AOR	Unk	VML	Y
	Northwestern Mutual	Horizon Next	Media AOR	US	PMG	Y
	Odele	Unk	Media Buying & Others	US	Haberman	Y
	Olive Garden	Starcom	Media Planning & Buying AOR	US	Havas Media Network	Y
	Pacific Life Insurance	Various agencies	Integrated AOR	US	GSD&M	Y
	Panda Express	None	Media AOR	Unk	The Many (retains duties)	Unk
	Paypal	WPP (recently resigned account)	Media	Global	IP	Y
	PepsiCo	None/In-House	Content Studio	Unk	VaynerMedia	Unk
	PetSmart	Mediasmith	Media AOR	Unk	Empower Media	Y
	Princess Cruises	Unk	Integrated AOR	AUS	72andSunny	Unk
	Ramona	Unk	Social Media AOR	UK	Supernova	Y
	Red's	None	Creative AOR	Unk	Joan Studios	Unk
	Ross-Simons	Kepler	Media AOR	Unk	Doner Media	Y
	Sam's Club	Arnold, Horizon Next (consolidation)	Integrated Creative & Media AOR	Unk	Publicis Groupe	Y
	Screwfix	Unk	Lead Creative AOR	Unk	M+C Saatchi Group	Y
	Solo Stove	PMG	Media AOR	Unk	Carat	Y
	Southwest Airlines	None (GSD&M remains on roster)	Creative	Unk	Leo Chicago	Y

Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Spectrum	Various agencies	Lead Creative	Unk	VCCP	Y
	Spectrum	iProspect, PMG, various others	Lead Media	Unk	Horizon Media	Y
	Starz	Canvas Worldwide	Media AOR	NAM	Horizon Media	Y
	Subway	Dentsu Creative (maintains social duties)	Creative AOR	US	Leo	Y
	TikTok	Various agencies	Creative AOR	Global	Pereira O'Dell	Y
	TJX Cos. (HomeGoods and Sierra Trading Post)	McCann, adam&eveDDB (expected to defend)	Creative	Unk	IP	Y
	TJX Cos. (HomeGoods and Sierra Trading Post)	Mindshare (expected to defend)	Media	Unk	IP	Y
	UNICEF USA	Delve	Media AOR	US	Brainlabs	Y
	Vera Bradley	Unk	Creative AOR	Unk	Callen	Y
	Vitamix	Marcus Thomas	Integrated AOR	Unk	Colle McVoy	Y



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A word about the author: Bruno Galpois 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 Galpois, Co-Founder and Principal, Agency Mania Solutions

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