

Industry Update

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

July - August 2025 | Volume 83

In this issue:

TALENT



Securing the right talent and resources

You may have heard that headline: “AI Is Here and You’re Behind.” Fueled by FOMO, everyone seems to jump headfirst and then figure out how to swim... [continued on pg. 2](#)

WORK AND PERFORMANCE



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

Is the economy at risk? According to Adobe, Amazon’s Prime Day... [continued on pg. 8](#)

FINANCIALS



Driving efficient use of resources

WPP had a very challenging first half given pressure on client spending and a slower new business environment. WPP reduced its outlook for 2025... [continued on pg. 12](#)

AGENCY



Agency reviews and roster changes

Inspire Brand-owned fast-food sandwich chain **Arby’s** selected Publicis-owned BBH and independent Tombras to manage its creative business... [continued on pg. 17](#)

ARTICLE



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

Contributed by: Morag Cuddeford-Jones

AI isn’t why the agency model is evolving, it’s just a catalyst for... [continued on pg. 11](#)

EXECUTIVE SUMMARY: July - August recap

More than 15,000 attended the five-day Cannes Lions International Festival of Creativity in June. The expectation of many is that AI will be the enabler of human creativity. Havas, for example, is referring to itself as an “AI-driven organization fueled by human ingenuity.”

On the first day of Cannes Lions, Apple marketing leader Tor Myhren made a case for human creativity as the industry’s savior and superpower. An inspiring call to action perhaps, but many are questioning the fate of human talent in an AI age. AI is big. Point in case: AI chipmaker Nvidia became the first company to reach a market capitalization of \$4 trillion, getting there before Apple and Microsoft (currently the only members of the \$3 trillion club).

AI is changing the world of advertising faster than any other development in the past century. Here is another way to put it: If you took a yearlong sabbatical in Bali and disconnected from the advertising and corporate world (lucky you!), you

probably wouldn’t recognize it when you returned. This Industry Update is the single best way to get you caught up. Welcome back!



Bruno Gralpois

Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources



You may have heard that headline: “AI Is Here and You’re Behind.” Fueled by FOMO, everyone seems to jump headfirst and then figure out how to swim. AI is being embedded in every facet of society, and it’s not always uplifting. Pope Leo XIV called AI an “existential threat” to humanity. Amazon CEO and President Andy Jassy wrote to employees detailing how AI will change every part of Amazon and may lead to staff adjustments. Studies and research point to the same conclusion: AI is transformational at many levels, so brace for impact as it’s here to stay and grow in scale and importance. Some think that AI is a bubble and that many AI-hyperfocused companies may be overhyped and overvalued. Maybe. Can agencies afford to miss riding the giant wave that now seems unavoidable? Forget the bubble metaphor. It’s more like a snowball that started the avalanche you are now under. Take a look at our fast-growing section dedicated to AI news, which appears later in this Talent practice area.

- Per Ad Age, for the first time in history, the world’s biggest agency company is not a legacy holding company with roots in the aggregation of iconic ad agencies; it is in consulting and tech. Tech-powered advertising and marketing services group **Accenture Song is the largest agency company in Ad Age’s annual rankings**, taking the crown from WPP. (Once Omnicom’s acquisition of Interpublic Group (IPG) is complete in late 2025, Omnicom will take the first spot.) Revenue for the world’s 25 biggest agency companies increased 3.6% in 2024, to a record \$153 billion. Worldwide organic growth for the top five legacy holding companies came in at an average of 2% in 2024. The top five legacy agency holding companies—WPP, Publicis Groupe, Omnicom, Interpublic, and Dentsu Group—accounted for nearly half (\$72 billion) of that revenue, up 3.7%.
- **WPP** changed senior leadership in September. Cindy Rose, formerly of Microsoft, was appointed as the new CEO of WPP, replacing Mark Read, underscoring the critical role of technology for the large holding company and the need for change in light of suboptimal performance in recent years compared to other groups such as Publicis.
- The **agency world has changed significantly in the last century**. Per Ad Age, out of the top 22 global agencies in 1945, only four are still standing (Omnicom’s BBDO and Interpublic’s McCann, FCB, and No. 21 Campbell Ewald).
- **Newell Brands** strengthened its in-house agency to become “content machines able to take a creative strategy, extrapolate it across multiple mediums, and build out a thorough execution of the idea globally.” In-house duties include e-commerce content, packaging design work, content creation, as well as digital campaigns and influencer marketing to retailer media and packaging. The brand still hires external creative agencies for creative strategy work, and media agencies for broader media strategy, buying, and optimization.
- **Expedia Group** downsized its in-house agency in a move it says is to drive greater creative agility and better serve its business and travelers. The group is streamlining and accelerating its creative development.
- **WPP** reached media singularity through its “large marketing model” named Open Intelligence, which is capable of turning “trillions of data signals” (WPP data and client data, combined with 350+ partners like Google, Meta, Snap, TikTok, and Experian) into real-time, predictive actionable intelligence across channels, markets, and consumers globally.
- Per the Association of National Advertisers (ANA), **client-agency tenure** doubled due to clients “seeking long-term strategic partners which can provide integrated solutions, navigate complex marketing challenges and drive sustainable business growth.”
- **Indie Agency News** introduced its five pillars to serve independent agencies (278 members as of July 2025):
 - 1) Media + Editorial (“alive” content for members to use)
 - 2) Community (built-in social platform)
 - 3) Celebration (four Top 40 awards to celebrate indies)
 - 4) 15-Minute Member Consulting Sprints
 - 5) Business Development
- **TrinityP3** launched BetterPitch, a new framework designed to make marketing and procurement agency review processes simpler, faster, and more effective. The framework promotes 5Fs: Fast, Fit, Focused, Flexible, and Fun.
- Per **ECI Media Management**, top 10 considerations for a media agency pitch:
 - 1) What’s your desired outcome?
 - 2) How will you run the pitch?
 - 3) What is the baseline?
 - 4) What are the dealbreakers?
 - 5) What will the agencies present?
 - 6) Are you comparing apples with apples?
 - 7) Are you well positioned to truly understand the potential value of the bids you receive?
 - 8) Have all bases been covered?
 - 9) Are there regular opportunities to assess the relationship?
 - 10) Is your contract framework up to date/relevant?
- Per Ad Age, agencies are increasingly hiring for **AI talent**, typically AI producers/content creators, AI content design managers, junior creative technologists, senior data scientists, directors of applied AI strategy, and media, as well as creative directors and copywriters. Mandatory skill sets are fluency in generative AI tools like MidJourney, Runway, DALL-E, Jasper, Copy.ai, and Writesonic and hands-on experience with large language models, prompt engineering, AI API, and AI content tooling (e.g., ChatGPT, Claude, Gemini). They also need to be comfortable shaping AI-integrated workflows to accelerate, enhance, or rethink content design.

- **Stagwell-owned media agency Assembly** launched Assembly Control, a tool supported by Assembly hubs in New York, London, Singapore, and Dubai, enabling advertisers to ensure brand safety ad suitability and reduce risks across publishers, apps, and environments.
- Marketing solution provider **We Are Rosie** has amassed a community of 35,000+ independent experts in creative, strategy, content production, technical, social, comms, and media disciplines. The firm assists brands in curating and assembling a team of experts specializing in the work needed. Clients include Microsoft, AT&T, Google, IHG, Diageo, AbbVie, Meta, Delta, Hilton, Kohler, and Walmart.
- Per the ANA, a recent **study about agency models** shows that most brand advertisers (46%) prefer a roster of multiple best-in-class agencies, followed far behind by in-house agency (16%), free agency (14%), and integrated agency team (11%). The least popular options—holding company models with sister and custom agencies (2% and 1%, respectively)—speak to the increasing trend of clients hiring agencies on a project basis rather than as agency of record. 40% expect their agency roster sizes to stay as is within the next 12 months, compared to 34% that expect them to shrink, and 26% that expect their rosters to grow. When selecting an agency partner, 98% consider the agency's creative execution as the most important attribute, followed by cost-value and strategic "big idea." The least-valued attributes are geographic proximity, previous/existing relationships, unique agency philosophy/process, and agency reputation (awards, press coverage).
- **Stagwell** launched Stagwell Media Platform using its tech stack and agency AI planning systems, tech partnerships and scale, to model, forecast, and optimize efficiency and outcomes across media, creative, and digital transformation services for clients.
- UK-based sports marketing agency **Dark Horses** folded within Omnicom TBWA\London to deepen the agency's expertise in sports, culture, and entertainment.
- **Mischief** launched in-house production studio The Candy Factory (inspired by Willy Wonka) to quickly create content using AI and traditional methods. The studio is staffed with AI creators offering services such as still photography, live action, visual effects, postproduction, editing, VFX, computer graphics, and AI-assisted content.
- A new design house, **Shophouse**, launched with a mission to deliver "strategic brand transformation, innovative digital experiences, dynamic content systems and groundbreaking retail solutions for the best brands in the world." The firm is built on a remote freelance model, assembling experienced creatives, specialists, and strategists best suited for each project. Clients include Coach and Kate Spade, and Procter & Gamble's premium skin care brand SK-II.
- A new London-based global innovation agency, **Plus1 Assembly**, launched to offer clients a diverse offering: Halo, a live cultural intelligence system that tracks culture on social, then instructs brands how to respond; Layfe, an AI consultancy that Plus1 acquired; and Rise, an investment arm. Clients include Rezzil, The Stomping Ground, and Codeblaze.

New agencies or capabilities, restructurings, and reorganizations:

- **WPP** restructured its GroupM offering through the name WPP Media in a move to simplify operations, improve financial performance, and integrate the media unit's offering with WPP's umbrella marketing/technology platform, WPP Open. With the change, WPP clients can combine media, data, production, and advanced AI-powered capabilities in ways that enable personalization of marketing messages at scale.
- **Havas Media Network** launched its Health Equity Marketplace in partnership with healthcare adtech firm DeepIntent, a program designed to convey healthcare-related marketing messages from brands to underserved communities in North America, including minority groups, rural populations, and underinsured patients.
- **Stagwell** consolidated and rebranded its production operations—Anomaly Content & Entertainment and Wolfgang Studios—under a new entity called Unreasonable Studios, "powered by" Stagwell's digital language service platform, Locaria. The aim is to scale international campaigns with multilingual content and other localization services. Unreasonable Studios, with 200+ employees and 1,200+ contractors in 60 countries, will provide original and branded entertainment, live action commercial work, editorial photography, digital and social media, creator content, postproduction, motion, and design capabilities, and adaptation and localization technologies and services.
- **Omnicom** combined its top data and tech assets (including Omni, OmniAI, Artbot, and Flywheel Commerce Cloud) into a unified platform called Omni. IPG's performance marketing shop Kinesso and data broker Acxiom are expected to be incorporated post-acquisition.
- Omnicom launched **Omnicom Oceania** in a move to align all of Omnicom's practice areas in Australia and New Zealand, including market-leading media and creative agencies, PR, performance marketing, and production under a unified structure.
- **Cheil North America** launched a full-service media agency called Attention Arc (the fifth agency in Cheil's North America portfolio) by merging creative agency McKinney's media buying arm with direct marketing agency Lockard & Wechsler Direct, in a move to scale up media buys (currently \$500M in billings). The new agency will handle all media buying across the network's agencies, a role previously played by McKinney Media.
- A new full-service agency called **Project3** launched, aiming to redefine brand-making with a focus on storytelling and to expand creative resources for businesses. The agency will handle creative direction, content creation, production services, and brand design and strategy.

AI (Artificial Intelligence):

- **Agency Mania Solutions** introduced new AI capabilities within its EvaluationDeliver™ platform—advancing how brand advertisers assess and improve the performance of their agency relationships. The new capabilities are AI-Powered Evaluation Dashboard, AI Assistant, AI-Powered Report Exporter, and AI-Powered Insight Reports.
- Per **The ProcureCon Marketing 2025 Playbook**, 100% of procurement professionals are using data analytics to identify and mitigate risks in agency relationships to some extent. 88% agree or strongly agree that “generative AI tools are significantly transforming procurement marketing strategies, demonstrating that AI is no longer a future consideration, but a present-day force reshaping the industry.” They use AI for market research and competitive analysis (73%), data analysis and reporting (71%), customer relationship management (54%), and content creation (48%).
- **StrawberryFrog** launched two new AI-powered units: StrawberryFrog AI, which focuses on applying AI across the marketing funnel, and Inplural, an AI product innovation and transformation agency. **Raindrop** launched Raindrop Realms, which uses AI-powered digital backgrounds and scene extensions that allow it to cut production costs by nearly 60%.
- **OpenAI** released o3-pro, a reasoning model added to ChatGPT that can analyze files, search online, and complete other tasks. It scored especially well with reviewers on “comprehensiveness, instruction-following and accuracy.” It is built to allow longer answering queries and provide better and more accurate responses. OpenAI reduced costs by 80% for both input and output tokens.
- Financial institution **US Bank** partnered with specialist shop Supergood (a spin-off of Supernatural AI) to create spots using AI capabilities in two months from beginning to launch, including competitive analysis, creative brief, creative variations based on unique customer segments, and social and digital media copy. Supergood reviewed and edited the AI copy.
- Per **Boston Consulting Group**, 71% of marketers plan to invest at least \$10 million in generative AI over the next three years. 68% are already deploying or plan to deploy live-action style video generation without humans and for video enhancement, such as editing and supplementations.
- CPG giant **Unilever** launched an AI-driven design unit, Sketch Pro, in partnership with IPG’s creative production agency IPG Studios, to quickly deliver social-first content with aid from tools like Google’s Veo 3 and Adobe Firefly. Sketch Pro operates in London, São Paulo, Mumbai, and Jakarta, and Unilever plans to expand into 21 markets.

- Per CNBC, **Meta AI** reached a milestone of 1 billion monthly active users across its family of apps, including Facebook, Instagram, WhatsApp, and Messenger (compared to OpenAI’s ChatGPT and Google’s Gemini, which have 180.5 million and 400 million monthly active users, respectively), doubling the 500 million monthly active users Meta AI reported in 2024. The integration of Meta AI into the search bars of Facebook, Instagram, and WhatsApp, coupled with the April launch of a stand-alone app, has made the assistant a seamless part of users’ daily interactions.
- Meta announced that it will enable **Facebook** and **Instagram** advertisers to create and target campaigns using AI tools by the end of the next year simply by using a product image and a planned marketing expenditure, competing directly with advertising agencies that provide this type of service. An internal study also claims that Meta’s AI-powered ad tools drove a 22% improvement in return on ad spend for advertisers last year. Mark Zuckerberg has stated that Meta will spend hundreds of billions of dollars on developing AI products and construct a data center nearly the size of Manhattan.
- **Stagwell** launched The Machine, the holding company’s AI-powered intelligence layer and operating system that aims to unify people (clients and agencies), tools (Adobe, Figma, and proprietary agency tools), and (customer) data into a seamless, collaborative experience for its teams and clients. Stagwell cites benefits including enhanced creativity (automating briefs to creating assets), elimination of silos, streamlined workflows, and improved performance (feeding and analyzing performance data in real time).
- **L’Oréal Groupe** and **Nvidia** announced their partnership to unlock AI’s potential across multiple aspects of beauty to enable beauty experiences, leveraging the Nvidia AI Enterprise platform for rapid development and deployment of AI. One example is the scaling of 3D digital renderings of L’Oréal products, for a fusion of physical AI and generative AI to expand creative possibilities. The two companies previously collaborated on L’Oréal Groupe’s generative AI content platform CREAITECH and AI-powered multibrand marketplace startup Noli (“No one like I”).
- **Amazon Ads** launched an upgrade to its video generator for US advertisers that allows them to use AI prompts to create realistic motion shots for their products. Real product shots/videos (tutorials, demos, social content) can be combined with synthetic images and transformed into moving videos that appear in searches and product detail pages.
- The American Association of Advertising Agencies (4As), International Advertising Association, The One Club for Creativity, and others launched, in partnership with AI platform Springboards, an **online blind-taste** test to evaluate the creative capabilities of OpenAI’s ChatGPT, Anthropic’s Claude, Google’s Gemini, and Meta’s Llama, as well as Grok, Mistral, DeepSeek, and other models.

- The **ANA**, in partnership with outside legal firm Venable LLP, launched a standardized AI contract rider that can be added to service agreements between advertisers and agencies. The rider outlines the practical and legal aspects of using generative AI, including the need to disclose AI usage, the ownership of AI-generated work, and ethical considerations related to misinformation and data privacy.
- **Brandtech** produced more than 2 million AI ads for 5,000 brands since 2018, claiming to produce work 62% faster and 55% cheaper, which resulted in a 40% better ROI.
- **WPP** launched AgentBuilder Pro in WPP Open, a significant upgrade to its existing AgentBuilder tool that is powering more than 30,000 agents inside WPP. AgentBuilder Pro is a comprehensive suite of tools to enable the creation of more sophisticated agents.
- **WPP** integrated TikTok's Symphony Content tools into WPP Open, its AI-enabled marketing platform. TikTok's suite of generative AI tools comprises Symphony Digital Avatars, Symphony's AI dubbing translation tool, streamlined content creation through a video generator, and more.
- **IPG** launched a new offering, Agentic Systems for Commerce (ASC), designed to help CPG brands manage their commerce ecosystems by leveraging automation and AI. To optimize commerce performance, ASC leverages Interpublic's proprietary agentic system and is powered by data from Intelligence Node, the transaction data company Interpublic acquired in December 2024.
- Per Adweek, five startups use **AI agents** to automate ad ops and marketing tasks: MarkeTeam (in-house marketing teams), Olyzon (ads on connected TV platforms), ProRata (search-related services), Streamr.ai (creative production and media buying for CTV ads), and Swivel (ad monetization for publishers).
- Global production and independent third-party consultancy **APR** launched a new offering, positioning itself as the "world's first AI-native creative production advisory," to help brands optimize marketing investment across the content supply chain. The firm will leverage its proprietary data platform ACERO™ and suite of AI-powered tools.
- **Publicis Groupe's Digitas** introduced a new tool called NX Score (short for Networked Experience Score), which scores brands based on their connection with consumers and how they stack up against competitors. The tool, part of a larger AI platform, uses thousands of datasets (e.g., social media mentions and purchase frequency) compiled from numerous owned and public sources to deliver a report showing how a brand performs with several types of consumers of differing loyalty levels.
- **Interpublic** launched its "simulation studio" powered by new "agents-based" research, in partnership with AI startup Aaru. The studio is capable of simulating human responses to any scenario (including ad campaigns in private, political, and public sectors) with a speed and accuracy that human-based research methods can't match. The capability is integrated with proprietary consumer data from Interpublic's Acxiom unit.
- Per the **Interactive Advertising Bureau (IAB)** and its Digital Video Ad Spend Report, 22% of video ad creative was either built or enhanced using generative AI in 2024—a figure expected to nearly double by 2026.
- Per the white paper "**Adapt or Die: Reinventing Your Agency in the Age of AI**" by Original Minds, the AI marketing industry is set to more than double from \$47.3B in 2025 to \$107.5B by 2028. 67% of agencies say they're "using AI," but only 30% have integrated it into more than three core workflows.
- **Truth Collective** launched AI Bravestorm, a human-led, AI-supported creative sprint workflow and premium workshop experience that supercharges your marketing. Use cases include Brand Strategy (distill a brand's positioning in days, not months), Naming (hundreds of AI-assisted, human-vetted names—instantly validated), Campaign Development (creative concepts and digital tactics ready for market activation), Content Strategy (clear, immediate road map and content calendars ready to deploy), and Zero to Launch (launch smarter, faster, and more strategically).
- CPOstrategy released its **AI in Procurement Playbook Vol. 2**, which explores how new digital tools are redefining procurement's role within the enterprise through AI. It includes practical strategies and vital solutions to empower leaders and their companies to integrate AI into operations seamlessly and intelligently.
- Per IBM's 2025 CMO study, "**The CMO revolution: 5 growth moves to win with AI**," 64% of CMOs are accountable for profitability and 58% for revenue growth. Five growth moves:
 - 1) Forge an infrastructure that doesn't flinch
 - 2) Heal your EX to fix your CX
 - 3) Hire for heart, train for AI
 - 4) Win the moment
 - 5) Stop chasing campaigns, architect outcomes instead
- Per business and revenue model strategist Tim Williams, **agencies must better monetize the value of AI**: The cost of licensing the most popular AI tools averages around \$120,000 for a 100-person agency (\$1,200 per person), yet agencies "unfortunately apply the same cost-based thinking to AI that they do their basic revenue model" (charging for that cost as they do for people), as the form of a "technology fee" equal to 2% to 3% of the total fee associated with a project. Six recommendations:
 - 1) Charge a set price for agency outputs powered by AI
 - 2) Charge a price for agency-developed programs that leverage AI
 - 3) Charge a price for using agency-developed AI tools
 - 4) Charge a price for the outcomes produced with the help of AI
 - 5) Charge for AI-as-a-Service
 - 6) In every area possible, aggressively use AI to do more work in less time
- **Magnolia** launched its AI-powered, generative strategic planning and brief writing tool, built exclusively for agencies as a research assistant and brief builder. Agencies can research clients, conduct business and competitive analysis, create strategic plans, and come up with ideas in minutes, not weeks, while preserving the agency approach and expertise.

Noteworthy quotes:

- » “You’re one idea away from changing the world.” —Judy John, Global Chief Creative Officer, **Edelman**
- » “AI is a growth engine, not a cost cutter.” —Mollie Rosen, President, Member Experience, **4As**
- » “The smart AI-forward agencies are earning higher, not lower, margins because they are pricing the value of AI, not its cost.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “AI is a force multiplier. If you’re good, it’ll make you better. If you’re lazy, you’ll get exposed.” —Craig Elimeliah, Chief Creative Officer, **Code and Theory**
- » “Stop using AI to shrink. Use it to grow.” —Mark Wagman, Managing Director, **MediaLink**
- » “AI is resulting in the industry’s ‘Kodak moment.’ If you’re a creative agency, you’re screwed.” —David Jones, CEO and Founder, **Brandtech**
- » “The good news is AI is not going to kill advertising. The bad news is AI is not going to save advertising. We’ve got to save ourselves, by believing in what’s always made this industry special: human creativity.” —Tor Myhren, VP Marketing Communications, **Apple**
- » “AI can speed things up. But let’s not pretend it turns prompt fluency into creative mastery.” —Daniel Jeffries, Founder, **Jeffries Consulting**
- » “I’m not convinced that agencies can build a SaaS-type business in competition with software companies like Adobe.” Martin Sorrell, Executive Chairman, **S4 Capital**
- » “Procurement is now the link between ambition and execution, risk and resilience, creativity and accountability. In the AI era, procurement isn’t on the sidelines. It’s in the driver’s seat.” —Ramzi Chaabane, Global Category Manager for E-Commerce & Emerging Platforms, **L’Oréal**
- » “The mission of agencies is to direct the time saved by AI into becoming a better, stronger ‘brain.’” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “Creativity has to be at the center of everything.” —Luiz Sanches, Global Chief Creative & Design, **Kimberly-Clark**
- » “Our in-house agency is a core capability that enables our brands to achieve marketing and commercial innovation excellence and bring our corporate strategy to life.” —Melanie Huet, CMO, **Newell Brands**
- » “A majority of agencies still operate on the model ‘big machine, small brain’ at a time when we need to present ourselves as ‘big brain, small machine.’” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “Our approach is to play to the strengths of both internal and external teams. The in-house agency delivers speed, agility, and deep brand alignment, while our external partners bring scale, technical depth, and innovation in areas like media and mar-tech.” —Melanie Huet, CMO, **Newell Brands**
- » “Businesses don’t inherently want to pay for AI. They would rather pay for outcomes that AI helps unlock.” —Ryan Mason, President and COO, **Markacy**
- » “If we employ AI only to help us keep doing the same work, but faster, our clients will quickly figure out they can adopt the same AI tools and simply duplicate what we do. We must use the AI revolution as an opportunity not to increase our speed, but to increase our value.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “We believe in the future of agencies. We believe AI will enable agencies and advertisers to focus precious time and resources on the creativity that matters.” —Alex Schultz, VP Analytics and CMO, **Meta**
- » “For those that say the future of production is all AI, it isn’t: the future of production is great humans doing great work that will be enabled by tech.” —David Wheldon, President Emeritus, **World Federation of Advertisers (WFA)**
- » “AI is transforming the agency-client dynamic by unlocking real-time transparency, automation, and performance visibility like never before.” —Ramzi Chaabane, Global Category Manager for E-Commerce & Emerging Platforms, **L’Oréal**
- » “We’ve built a team of specialists—copywriters, strategists, designers—and we partner with brand leaders to define one focused idea per brief. Then the agencies blow it out.” —Luiz Sanches, Global Chief Creative & Design, **Kimberly-Clark**
- » “With AI-powered platforms, silos break down and every agency’s true value becomes visible: spend, results, innovation, and impact. This shift puts procurement at the center of the action, not as a support function, but as a strategic orchestrator of the marketing ecosystem.” —Ramzi Chaabane, Global Category Manager, **L’Oréal**

- » “Purposeful partnerships aren’t just collaborations, they facilitate real growth!”
—Philipp Schuster, Agency & Marketing Partnerships Director, Global Strategic Marketing, Consumer Health, **Bayer**
- » “Right now, it probably feels like shouting about your AI chops is the difference between success and failure. It’s certainly an easy way to claim to be the cleverest kid in the playground. But ultimately, it’s what your clients actually get that really matters. As the old saying goes, don’t tell me you’re a comedian, just make me laugh.”
—Robin Bonn, CEO and Founder, **Co:definery**
- » “You can never have no agencies. We’ve seen it time and time again, brands trying to take things in-house. The magic we bring is this consultative outside thinking and dreaming.” —Maggie Malek, CEO, **Crispin**

- » “Transformation doesn’t happen by accident though—it requires intention, investment, and a model built to support it. This won’t happen if we trap it inside outdated economic models.” —Mollie Rosen, President, Member Experience, **4As**
- » “AI is like a giant wave and everybody’s in the water. There’s a bunch of people looking at it going, ‘Oh no, I don’t know what to do,’ and if they don’t move, they’re going to get hit by this wave. Meanwhile, there’s a load of people grabbing surfboards who are going to jump on it and go, ‘I’m going to use this to propel me to the front of the pack.’” —Howard Moggs, Founder and Chief Growth Officer, **Team Uncommon**
- » “Agency performance appraisals aren’t ‘nice-to-have.’ They’re nonnegotiable if you want stronger collaboration, better work, and measurable ROI. If you’re not evaluating your agency, you’re limiting the impact of your marketing.” —Mitchell Caplan, Marketing Ops and Agency Relationship Management Consultant, **Chameleon Collective**



agencymania.com



BRUNO GRALPOIS

Co-Founder & Principal
Agency Mania Solutions

Those who build the right framework today—grounded in shared ambition, measureable impact, and mutual trust—will unlock the future of AI tomorrow.

Check out our newest article, “**If My Agency Uses AI, Am I Overpaying?**”: As artificial intelligence reshapes agency operations and increases productivity, advertisers must rethink compensation models and ensure they’re paying for true value—not just output.

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



Is the economy at risk? According to Adobe, Amazon's Prime Day summer sales event generated \$24.1 billion, a 30% YOY increase, and an indication that the US economy and consumer confidence remain healthy. We may be creating more content, faster, and cheaper. We are pushing more through a limited number of channels to overly stimulated consumers. So, is it also more effective? Probably not. Human creativity has never been more valued. How do you breakthrough through the clutter? How do you engage consumers and add value to their lives in the process? The tools are changing. The ways of working are changing. Technology is the enabler. But the fundamentals of marketing remain. Will marketers rise to the challenge? No doubt. Check out the recognition that brands and agencies are rightfully being awarded for upleveling their craft.

- The ANA released its updated **"Better Creative Briefs for Better Brand Building"** white paper aimed at improving the creative brief so it can act as a road map and catalyst for creative teams. Key message: Creative briefs remain critically important, and we are still a long way from routinely achieving greatness.
- Per Ad Age, **BBH Singapore** developed what it claims is the country's first legal "gum," called Unthinkables, developed in partnership with BBH's in-house Innovation Lab and Oni Cupcakes. It contains no gum base, making it legally permissible while offering the full gum-chewing experience without the risk of a fine (chewing gum has been illegal in Singapore since 1992). The campaign features fun headlines such as "A fine time. Without getting fined" and "Sticks to the law. Not your shoe."
- Rise New York & Partners built an **AI jury**, and trained it on 20 years of Cannes Lions winners and transcripts of jury discussions to determine the winner of the Lions Titanium Grand Prix from a list of 18 shortlisted campaigns. The AI jury picked Heineken's "Pub Succession," not AXA's "Three Words" by Publicis Conseil, the actual Titanium Grand Prix winner.
- Per **Interbrand**, brands that prioritize creativity saw EBIT (+2.7%) and market capitalization (4.7%) grow faster than a baseline average. High-awareness brands (60% awareness or more) are 3X more likely to convert a customer on TikTok than low-awareness brands (20% awareness or less).
- Per the **2025 Cannes Lions International Festival of Creativity**, key takeaways about creativity:
 - 1) Humanity is a competitive edge
 - 2) Speed isn't always the solution
 - 3) Authenticity cuts through
 - 4) Winners take risks
- The **Festival of Creativity** issued integrity standards and measures to ensure fair competition:
 - 1) Ownership and authorship (accountability, partnership, and permission)
 - 2) Veracity of claims (rigorous, two-tier fact-checking system, objective, independent expertise and support, AI integrity handbook)
 - 3) Consequence of misrepresentation (disqualification and withdrawal, sanctions for deliberate misconduct)
 - 4) Due process and independent oversight (independent integrity council and due process)
 - 5) Annual creative benchmark integrity audit
- Highlighted campaign at Cannes Lions: Dove's influential and long-running (21 years) **"Campaign for Real Beauty"** continues to rack up accolades, winning the Grand Prix for Creative Strategy – Long-Term Brand Platform. The Real Beauty platform also received the Grand Prix in Media.
- Apple was named the Cannes Lions 2025 Creative Marketer of the Year. Apple's campaign **"Shot on iPhone"** won a new Lions subcategory, Creative Effectiveness – Long-Term Brand Platform, which required entries to include three or more distinct campaigns within a broader brand strategy that has been in the market for at least three years. At least one of those campaigns must have won or been shortlisted at Cannes Lions in 2022, 2023, or 2024.
- Per Mercer Island Group (Steve Boehler), **The Better Clients Get Better Work Checklist**:
 - 1) Frame the journey: Have clear goals and strategy for the business and vision for the brand
 - 2) Brief better: Brief the agency (in writing and meetings) thoroughly
 - 3) Train: Make sure your teams know how to evaluate the work and give effective feedback
 - 4) Create proxies: Decision makers can't be in every meeting, but consistent feedback and guidance is essential to an agency's success
 - 5) Root for the agency's margin and profitability: The best agencies get paid the most, just like the best performers in most industries
 - 6) Create deep relationships: Top-to-top calls; constant and effective communication; break bread; get to know the people as people
 - 7) Painless approval processes: The approval process should be built around what is possible for the agency to deliver great work and the least number of meetings possible that can interrupt good progress
 - 8) Ensure SOW fidelity: Do not ask for out-of-SOW work without addressing the agency's compensation
 - 9) Be realistic: Be realistic about your goals and budget

Awards:

- **Goodby Silverstein & Partners for Cheetos** (“The Other Hand”) was named Best of Show at the 2025 American Advertising Awards (Addys), sponsored by the American Advertising Federation. It’s the second time in the past three years that work for Cheetos from Goodby has taken home Best of Show.
- **Omnicom** was named the Most Effective Holding Group in the 2024 Effie Index®, for the second year in a row. Among Omnicom’s agency networks, BBDO Worldwide ranked third and DDB Worldwide ranked fourth as the Most Effective Agency Networks. AlmapBBDO was named the Most Effective Agency Office globally for the second consecutive year. Regionally, Omnicom was named the #1 Holding Group in Latin America, with BBDO Worldwide as the top agency network and AlmapBBDO as the top agency. Omnicom was also named Holding Company of the Year by Gerety, MediaPost, and WARC for its Effective 100 list.
- Per **2025 Clio Health Awards**, Agency of the Year was Area 23, an IPG Health agency. Independent Agency of the Year: Klick Health. Network of the Year: IPG Health. Advertiser of the Year: a tie between Callen-Lorde and Dramamine. Dramamine’s “The Last Barf Bag” from FCB Chicago and Cemento Sol’s “Sightwalks” from Circus Grey won three Grand Clios each. IPG Health’s Area 23 won four Grands, two for Siemens Healthineers’ “Magnetic Stories” and two for “In Transit” for Callen-Lorde Hospital, the MTA, and the NYC LGBT Historic Sites Project. Other Grand winners included: Serviceplan Germany and L&C NYC for PetPace’s “Animal Alerts,” Quality Experience for Tonal’s “Stop Working Out in the Past,” Agency Anónimo and Catatonia Films for Save the Children’s “Fer,” Patients & Purpose for Claremont Forum, Prison Library Project’s “Contrabanned,” and FCB Canada for SickKids Foundation’s “The Count.”
- French agency **Publicis Conseil** won Cannes Lions Agency of the Year 2025, taking home 18 Lions (and 46 shortlists) across campaigns for AXA, Renault, Orange, and Nescafé. It was the second consecutive year Publicis Conseil won Agency of the Year.
- **WPP** was named Creative Company of the Year at the Cannes Lions International Festival of Creativity for a second consecutive year, based on which holding company’s member agencies earn the most points for shortlisted and awarded entries. WPP agencies collected 168 Lions, including one Titanium, 10 Grand Prix (including the Glass Lion for Change), 23 Gold, 53 Silver, and 81 Bronze.
- Per Cannes Lions 2025, **Grand Prix** winners included: Dove’s “Real Beauty” (Lion for Change), AXA’s “Three Words” (Titanium and Direct), Channel 4’s “Considering What?” and L’Oréal’s “The Final Copy of Ilon Specht” (Film), “The Best Place in the World to Have Herpes” for the New Zealand Herpes Foundation (Good and Health for Good), Museum for the United Nations—UN Live and Spotify (Innovation), AXA’s “Three Words” created with Publicis Conseil Paris (Creative Business Transformation), Ziploc’s “Preserved Promos” (Creative Commerce), Apple’s “Shot on iPhone” (Creative Effectiveness), Dove’s “Real Beauty” (Creative Strategy and Media), LVMH’s “The Partnership That Changed Everything” (Luxury and Lifestyle), FCB Chicago’s “Caption With Intention” (Brand Experience & Activation and Design and Digital Craft), GoDaddy’s Super Bowl campaign with Walton Goggins, “Act Like You Know,” (Creative B2B), Indian Railways “Lucky Yatra,” (PR), Ogilvy Singapore’s “Vaseline Verified” (Social & Creator), Hyundai’s “Night Fishing” (Entertainment), Mercado Libre’s Call of Duty takeover (Gaming), Bad Bunny’s ingenious album release campaign (Music), Clash of Clans’ “Haaland Payback Time” (Sport Entertainment), Telstra’s “Better on a Better Mobile Network” (Film Craft), Instituto Yduqs and IDOMED’s “Nigrum Corpus,” (Industry Craft), Vaseline’s “Vaseline Verified” (Health & Wellness), KitKat and the Paris 2024 Olympic Games Opening Ceremony (Outdoor), Viagra “Make Love Last” (Pharma), Penny’s “Price Packs” (Print and Publishing), Budweiser’s “One Second Ads,” (Radio & Audio).
- Per **Ad Age’s Small Agency Awards 2025**, the following won Gold (WorkInProgress) and Silver (Mirimar). Based on company size: 1-10 employees Gold (SuperHeros), Silver (Biite); 11-75 employees Gold (Courage), Silver (BSSP); 76-150 employees Gold (Preacher), Silver (Saylor). Data & Insights: Gold (Response Media), Silver (Vision Insights). Design: Gold (Selman), Silver (Moxie Sozo). Experiential: Gold (Civic), Silver (Think True). Media: Gold (Noble People), Silver (Stella Rising). Newcomer: Gold (American Haiku), Silver (Springtime). Public relations: Gold (Berk Communications), Silver (Genuine Article). Purpose-led: Gold (Values Partnerships), Silver (DCX Growth Accelerator). Best Agency Culture: Gold (3Headed Monster), Silver (Doe-Anderson). Campaign of the Year (Best Use of AI): Schneiders “Schneiders vs. SchnAlders” (Fuse Create) and Avocados From Mexico “Call Gronk on the Guacline” (270B). Campaign of the Year (Media): Field Roast Grain Meat Co. “Bratwurst Summer” (No Fixed Address) and Domino’s “Emergency Pizza 2.0” (WorkInProgress). Campaign of the Year (Integrated): Uber Eats “Football is for Food” (Special US) and Panda Express “Lunar New Year” (Opinionated).

Noteworthy quotes:

- » “In a TUNA world—Turbulent, Uncertain, Novel, and Ambiguous—marketers face pressure to deliver immediate savings. Yet evidence shows that short-term thinking can compromise long-term brand equity.” —Stephan Loerke, CEO, **WFA**
- » “Human oversight is essential. As platforms become more opaque, independent scrutiny becomes more valuable.” —Cory Halberstadt, Associate Director, Paid Social, **AXM (Ars X Machina)**
- » “Any relationship takes work, and a client-agency one is no exception. The best relationships are the ones worth working for, and if you do the work on yourself and together, your work will only get better for it.” —Ben Prout, Senior Director and Global Head of Creative, **EA Sports**
- » “All creative should be effective. When you say creative effectiveness, you’re saying the same thing twice, because it’s embedded in the creativity.” —Soyoung Kang, Chief Marketing and Innovation Officer, **eos**

- » “This direct connection makes the creative brief one of the most important documents a marketing team can create.” —Bob Liodice, CEO, **ANA**
- » “Human touch is our superpower.” —Tor Myhren, VP Marketing Communications, **Apple**
- » “Creativity has always been at the heart of effective marketing, but now, thanks to AI, we can finally unlock its full commercial potential with scientific precision.” —Manjiry Tamhane, Global CEO, **Gain Theory**
- » “We’ve moved away from those six-month, back-and-forth nightmares. Now it’s one to three meetings, done. Agencies want that. And we’re becoming a desirable client again.” —Luiz Sanches, Global Chief Creative & Design, **Kimberly-Clark**
- » “If you want to build a brand that people love, stop dictating to culture. Let culture dictate to you.” —Alemu Emuron, Chief Creative Officer, **The Quollective Africa**

ON SCOPE
THE MARKETING PODCAST

Episode 24:
The Hidden Costs of Agency Reviews

FEATURING:

Bruno Gralpois
Co-Founder and Principal
at Agency Mania Solutions

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

The Hidden Costs of Agency Reviews with Bruno Gralpois

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

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

Watch the full video [here](#).

- » “AI isn’t just reshaping creative development, it’s redefining how we measure, optimize, and prove the value of creativity.” —Manjiry Tamhane, Global CEO, **Gain Theory**
- » “An excellent brief remains the top contributor to effective creative work, and great creative, in turn, contributes to brand and business growth.” —Bob Liodice, CEO, **ANA**
- » “True creativity lives in the rough edges, the weird metaphors, the unexpected connections—the same stuff that gets smoothed away in the name of clarity and professionalism. When we optimize for being understood by everyone, we risk saying nothing that matters to anyone.” —Margaret Johnson, Chief Creative Officer, **Goodby Silverstein & Partners**
- » “Doing is the oxygen of creativity. We don’t just seek to be a creative company. We seek to be a company that creates.” —Mike Dubrick, Chief Creative Officer, **Rethink**
- » “In driving revenue and growth, the thing that still matters...is that creativity, great work is what makes marketing work.” —Lara Balazs, Chief Marketing Officer and EVP, Global Marketing, **Adobe**

- » “Technology is the biggest religion of the 21st century.” —Daryl Lee, Global CEO, **McCann Worldgroup**
- » “No client wants to be a bad partner, but no villain in history has ever believed they were bad either.” —Ben Prout, Senior Director and Global Head of Creative, **EA Sports**
- » “AI may power the engine, but it’s humans who steer the car. When the two work together, they unlock impact at a new scale.” —Cory Halberstadt, Associate Director, Paid Social, **AXM (Ars X Machina)**
- » “To build healthier agencies, we should not keep inventing work to justify retainers, sell clients sh*t they don’t need or hope they have a short memory just to stay in the saddle. Stop pretending every media relationship should be a marriage. Sometimes a Summer fling is better for the soul and the P&L.” —David Gaines, CEO and Founder, **Media by Mother**

ARTICLE

MARKETING PROCUREMENT

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

By Morag Cuddeford-Jones

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

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

Click here to check out Bruno Galpois’s interview by Morag Cuddeford-Jones and Marketing Procurement IQ about the state of our industry and AI.

FINANCIALS: Driving efficient use of resources



WPP had a very challenging first half given pressure on client spending and a slower new business environment. WPP reduced its outlook for 2025 midyear (to 4.8%), citing disruptions to global trade and continued de-globalization pressure. Others are faring better amid ongoing macroeconomic and geopolitical uncertainty: Omnicom reported 3% organic growth and \$4 billion in revenue. COMvergence assessed \$9B in media spending from concluded media pitches, indicating that an additional \$11B is still in play. Publicis won Mars' \$1.7B global Media business, another blow to incumbent WPP (the company's third major account loss in recent months). AI is expected to significantly reduce the time and labor required for creative work, requiring agencies to rethink compensation. Many agencies are bringing up new ways of being compensated (that do not involve their time) such as AI-as-a-Service (AlaaS, like SaaS) solutions.

- Per the 4As and the S&P Global Marketing Intelligence about the **economic impact of advertising on the US economy**, ad spending stimulated \$10.4 trillion (ad spend + stimulated sales activity), representing 21.9% of total sales generated in the US economy in 2024. Advertising also supported 29 million jobs or 18.3% of the US workforce. In conclusion, for every dollar of ad spending stimulated, on average, over \$20 of follow-on sales activity was generated. The total impact of advertising represented 19.9% of US GDP.
- Per **Gartner's CMO Spend Survey Data Snapshots**, digital spend makes up 61% of the total marketing budget in 2025. Paid media is the largest share of budget (30.6%). Among paid media, top spend is search advertising (13.9%), followed by digital display advertising (12.5%), social advertising (12.2%), and video and streaming (10.7%). Among owned/earned media, top spend is SEO (8.9%), email marketing (7.4%), and influencer marketing (5.9%). Event marketing receives the most offline spend (19.3%). 39% of the CMOs who are planning reduced budgets are from agencies: Eliminate underperforming agency relationships, simplify agency roster/portfolio, and renegotiate contracts and SOWs.
- Per COMvergence, **media agencies in the US** accounted for a lion's share (40%) of the \$263B in total media billings in 2024, followed by the top five European markets—UK, Germany, France, Spain, and Italy—which contribute 23%. China and India led APAC with a combined strength of 12%. Altogether, these eight key markets represented 75% of total billings in 48 countries.
- **WPP Media** downgraded its global ad expenditure growth forecast for the full year to 6% (compared with 7.7% estimate last year), for total global ad revenue of \$1.08 trillion for 2025, citing "disruptions to global trade and continued deglobalization pressures weighing on advertising investment," which translates into increased supply-chain issues and curtailed business investment. The firm predicts 6.1% growth in 2026. US advertising is forecast to increase 5.6%, to \$404.7 billion. Digital advertising continues to dominate, accounting for 81.6% of all ads, including digital extensions such as streaming TV, digital out-of-home, and digital print. Pure-play digital is expected to account for 73.2% of advertising in 2025. Retail media remains one of the fastest-growing segments and is expected to reach \$169.6 billion this year. WPP Media updated its ad spend outlook midyear, reducing US growth to 2.2%. Excluding political ad spending comparisons, WPP estimates US ad spending will expand 5.4% this year, down from 6.5% forecast at the end of 2024. The Big 3 holding company forecast consensus for US ad growth this year has now fallen to 3.8%. Expectations for 2026 are for 6.4% growth.
- The **US Federal Trade Commission** concluded its antitrust review of Omnicom's proposed acquisition of Interpublic and reached agreement with Omnicom and IPG on a mutually acceptable consent order, clearing the way for the transaction to proceed.
- **NBCUniversal's Super Bowl** ads will be sold for \$8 million for a 30-second unit in 2025. Super Bowl 59 reached \$800 million in gross revenue from advertising sales across all platforms, for Fox and Tubi. Fox reported that 127.7 million viewers tuned into the game.

Looking for a better marketing partnership management solution?

We offer enterprise-grade, automated, Software as a Service (SaaS) based solutions, designed to significantly improve the ability of brand advertisers to effectively manage their valuable marketing agency and supplier relationships.

Visit agencymania.com/partnership-management-software to see what our Agency Partnership Management Software can do for you, ad agencies, and suppliers.



Customized

Partnership
Management
Lifecycle

AGENCY MANIA
SOLUTIONS



- **Paramount** bought Ultimate Fighting Championship (UFC) rights for \$7.7B, an exclusive seven-year agreement. Paramount+ will stream all UFC matches, with some marquee fights also airing on CBS. **ESPN** acquired the NFL Network, a linear cable TV network, and other NFL media assets in exchange for a significant 10% stake in ESPN for the football league, a deal estimated to be valued at \$3B.
- Per COMvergence, in 2024 the **top 1,000 global advertisers** had a total media spend of \$214B. WPP Media (formerly GroupM) retained the top position, with \$64.6B in global billings, followed by Publicis Media with \$54.7B and Omnicom Media Group at \$45.6B. These top three groups represent 71% of total billings among the Big 6 globally. At the agency level, OMD claimed the top position with total billings of \$26.3B, followed by EssenceMediacom with \$24.6B and Mindshare with \$21.9B.
- Per COMvergence, there were **590 media account moves and retentions** in 47 countries totaling \$6.68 billion (the US representing 42% total spend), up 38% YOY. Independent agencies won or retained \$1.5 billion of the total (23%). A global consortium of independent agencies known as Local Planet was the top-ranked media agency network in global new business in Q1 2025, mainly due to Horizon Media securing the \$857 million US Charter/Spectrum cable company account, followed by Publicis Media's Spark Foundry (\$400 million Abbott Laboratories account win). At the holding company level, Publicis Media was top ranked with total new business of \$2.7 billion (including Coca-Cola North America media business, Barilla, Dropbox, Goodyear, LinkedIn, and Santander), followed by Omnicom Media Group and IPG's Mediabrands.
- Per the **Gartner** 2025 CMO Spend Survey, 39% of CMOs plan to cut labor costs and 39% plan to cut agency allocations. 61% of companies view marketing as a profit center (up from 53%).
- Per Parrot Analytics, **Netflix** added 32 million gross global subscribers in Q2, growing twice as fast than competitors (Walt Disney's Disney+ and Warner Bros Discovery's Max). Netflix reported a 16% increase to 301.6 million global subscribers in 2024 (81.4 million in the US).
- Advertising spend for **AI-based search** (known as answer engine optimization, or AEO) is expected to surpass \$1 billion in 2025, or 0.7% of total search ad spending this year, to nearly \$26 billion by 2029 (13.6% of the total).
- Per the **European Association of Communications Agencies (EACA)**, the average agency now spends more than €650,000 per year on pitching, with no guarantee of return, the equivalent of needing to win more than €7 million in new business annually just to break even. Agencies spend an average of more than €43,000 per pitch. Media agencies spend considerably more than creative agencies on pitching. Six out of 10 ideas are never implemented by the client. EACA warns agencies: "Don't give away your best thinking for free."
- Per eMarketer, **total social media users** in 2025 will grow 1.7% to 236.5 million, with adult users—who account for 90% of total users—up 1.9% to 212.8 million. Time spent on social media among adult users is forecast to hit its peak in 2025, at 1 hour 54 minutes per day, and is projected to go down to 1 hour 51 minutes by 2027.
- The ANA released its **Programmatic Transparency Benchmark: Q1 2025** findings. Per the study, the TrueCPM Index reveals a 37.8% optimization gap, indicating that over a third of open web ad spending still goes toward impressions that don't meet standard quality metrics. Using impression-level log data (LLD) to enable closed-loop optimization could reduce this gap by an estimated \$21.6 billion (20.8%) in a global programmatic market that has grown from \$88 billion in 2023 to \$104 billion in 2024.
- Per the **ANA**, global advertisers wasted \$26.8 billion on programmatic spend in Q2, a 34% increase from the \$20 billion tallied last year. The ANA released its new ANA Online Benchmark tool, available to its members and those of the Trustworthy Accountability Group. The tool is designed to enable them to spot inefficiencies, track progress, and make better investment decisions using the ANA TrueAdSpend Index and TrueCPM Index.
- Procurement marketing data aggregator **RightSpend** and in-house agency consultant **InnerGroup** formed a partnership designed to show brands how to boost efficiencies within their marketing operations and close gaps in process, resource, and technology.
- In partnership with John Ryan, CPA, Alta Incentives Group, and APR, the ANA released its **US Commercial Production Tax Incentives** report, providing a road map to help advertisers evaluate eligibility, avoid common pitfalls, and understand how to get cash back on productions.
- Per **COMvergence**, Omnicom's OMD ranked #1 in terms of 2024 US media agency by billings with \$10.4 billion, up 8.4% YOY, followed by Spark Foundry (\$8.8 billion, up 15.8%), and independent Horizon Media (\$7.6 billion, down 5.9%). At the group level, Publicis Media was top ranked with \$27.6 billion, up 16%, followed by Omnicom Media Group (\$18.5 billion, up 12%), and WPP Media (\$16.6 billion, down 3.2%). The top 10 independent agencies accounted for 16% of total measured agency billings.
- Per Ignition's **Agency Pricing and Cash Flow Report**, almost all (97%) small and midsize ad agencies are planning price increases in 2025. 36% expect to boost prices by 5% to 10%; 28% forecast increases of 11% to 15%; and 10% planned hikes of more than 20%. 45% adjust their prices only at contract renewal, while 22% never review prices at all.
- Tech giant **Google's Alphabet** reported \$96 billion in Q2 revenue, up 14% YOY, outpacing Wall Street estimates. Spurring the growth are large AI investments in web search and content creation in direct competition with OpenAI, Perplexity, and Anthropic. Google Search and affiliated properties like Gmail and Google Maps generated \$54.1 billion; \$9.8 billion came from YouTube, driven primarily by direct response and brand advertising. Alphabet also reported 450 million monthly active users of the Gemini app. The company plans to spend \$75 billion on AI this year.

- **Havas** reported 2.6% organic growth in Q2 and 2.3% in H1 (3.9% in North America), with €1.35 billion in net revenue in H1 2025, up 2.9% YOY. The YOY increase in personnel costs was 1.6%. Adjusted EBIT margin was 10.7%, a 50-basis point improvement, still targeting a margin between 12.5% and 13.5% by year-end. Key client wins include Olive Garden, Azid, and Under Armour, as well as continued growth with clients such as Sanofi and GSK. The group started reaping the benefits of its Converged.AI, an operating system the agency began implementing in 2024 as part of a €400 million AI investment strategy. The system uses machine learning to support media planning, analytics, creative production, and personalization.
- **Stagwell** reported its Q2 earnings, delivering 8% net revenue growth and \$707M in total revenue, driven by a robust pipeline and significant client wins, including \$117M in net new business in Q2 and \$451M over the last 12 months. Top 25 clients generated more than \$175 million in net revenue, up 26% YOY. Digital transformation net revenue grew 6%. The firm completed its acquisition of ADK Global (an APAC full-service offering, adding 10 new offices for Stagwell in the region) and experiential agency JetFuel (now part of TEAM). The firm launched Unreasonable Studios, producing tech-driven content and original documentaries for brands like Google, HOKA, and Marriott. Adjusted EBITDA margin was 16%.
- **Dentsu Group** reported net revenue of 1,194.1 billion Japanese yen (\$8.08 billion), up by 5.7% YOY for FY2024, with organic growth flat and an operating margin at 14.8%. The company also reported a significant goodwill impairment loss of 210.1 billion yen in the fourth quarter of 2024, primarily impacting the EMEA and Americas regions. This resulted in a statutory operating loss of 125 billion yen and a net loss of 192.2 billion yen for FY2024. For FY2025, the firm expects organic growth to be within 1% and the operating margin to be 12%, mainly due to upfront investments to restore competitiveness. For FY2027, the firm is targeting 4% organic growth and a 16% to 17% operating margin.
- Per Alantra, while macroeconomic headwinds and policy-driven uncertainty slowed **M&A activity** early in the year, confidence rebounded in Q2, triggering a sharp uptick in deals. Recent precedent transactions span AI-driven marketing tools, e-commerce consultancies, and digital experience platforms, highlighting continued buyer appetite for high-growth, differentiated assets. Examples of recent deals are Infosum acquired by WPP; Lotame acquired by Publicis Groupe; Sincera acquired by theTradeDesk; tagdigital acquired by Freeman; ADK Global acquired by Stagwell; and R/GA acquired by TrueLink Capital.

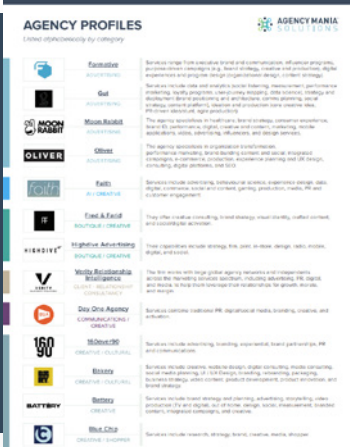
Mergers and Acquisitions (M&A) activity:

By major holding companies:

- **Dentsu** (through Dentsu Ventures) invested in Silicon Valley business automation platform Kognitos, which claims to be the first neurosymbolic AI platform, merging symbolic reasoning with the adaptive learning of modern AI.
- **Havas** acquired Toronto-based CRM and digital transformation specialist Enverta Digital, with clients such as CIBC and PepsiCo. The firm will be aligned with Havas CX Canada.
- **Havas** acquired Spanish digital performance and e-commerce strategy agency Tidart in a move to strengthen its global performance and e-commerce capabilities. The agency maintains its brand and operational structure, while integrating into Havas Media Network's global e-commerce practice, Havas Market.
- **Publicis Groupe** acquired Charlotte, North Carolina-based sports and entertainment marketing agency Bespoke. The agency, which helps brands connect with leagues, teams, and other sports properties through its consulting and creative services and event activations, will sit within Publicis Connected Media and be part of the holding company's broader sports marketing offering.
- **Publicis Health** acquired p-value Group, a Cedar Knolls, New Jersey-based medical communications group. The firm supports pharmaceutical, biotech, and medical device clients around the world. Capabilities include translating complex clinical and scientific data and results, research findings, and more into clear content tailored to various audiences like healthcare professionals, patients, regulatory bodies, and payers.
- **Accenture Song** acquired US-based social and influencer agency Superdigital in a move to address rising client demand for creator marketing (short-form video and social-native content production) and reinforcing social as a full-funnel marketing channel.

Looking for more?

Download our consolidated list of Agencies
Profiled from our Industry Updates:
agencymania.com/agency-profile-archive



By others:

- The newly independent **R/GA** acquired AI innovation studio Addition in a move to build AI-native processes and systems into the way R/GA works for clients and strengthen the agency's AI talent and capabilities. Addition had a range of clients including Google, Prudential, and Realtor.com.
- Marketing consultancy **Rival** acquired London-based Oat Studio to serve clients such as Xerox, JPMorgan, Reebok, Unilever, Tumblr, NASCAR, and Keurig Dr Pepper. Oat Studio is being rebranded to Rival Design as part of the move.
- Mid-Atlantic marketing communications agency **Aloysius Butler & Clark** acquired Oxford Communications, a firm specializing in strategic planning, branding, and advertising. Oxford will provide additional social media marketing and expanded paid media services for the combined entity.
- Global marketing company **Attivo** acquired AI digital marketing and branding agency The Next Practice (TNP), based in New York and Austin, to strengthen the company's AI efforts in healthcare, packaged goods, and tech in B2B, DTC, and B2E. TNP will join other recently acquired assets including Hill Holliday and Deutsch NY.
- Columbus, Ohio, marketing agency **The Shipyard** acquired digital agency TinyWins, which has offices in Santa Monica and Denver. TinyWins' capabilities include strategy, creative, design, and digital, as well as expertise in AI, Web3, and app development. Clients include Albertsons, Samsung, and Budweiser.
- Agency group **Mindgruve** merged with performance marketing agency Levelwing in a move to strengthen its performance marketing offering. The merger expands its US footprint and adds a portfolio of clients in multiple industries with a team of over 400 employees in eight US, Latin American, and European offices.
- **PMG** acquired the Boston-based retail media shop Momentum Commerce in a move to expand experience in retail media and marketing across Amazon, Walmart, Target, Instacart, and other retail platforms. Momentum's AI-powered proprietary Velocity commerce tech and data platform is being integrated into PMG's stack.
- Tech investment company **Driftwood Music Corp** acquired Nashville-based ad agency FlyteVu in a move to provide capital and resources to execute the agency's expansion plans.
- Phoenix-based **Harkey Media** acquired Mesa Outdoor, a leading independent OOH operator in the San Francisco Bay Area in a move to expand to key US markets like NYC, LA, Boston, and Las Vegas.

- Boston-based advertising agency **Connelly Partners** acquired McCarthy Mambro Bertino, another independent agency in the Boston area. The deal brings Connelly to about 175 staff, including 100 in Boston.
- UK-based media agency **Brainlabs** acquired LA-based media agency Exverus in a move to expand the agency's reach and full-funnel media capabilities (including its AI-driven media planning tools) in North America.
- London-based marketing agency **Gravity Global** acquired performance media agency Marketing Doctor to expand its presence in the US, strengthen its media practice, and deepen its expertise in complex industries like aviation, semiconductors, and franchised retail.

Holding company financial performance:

- **WPP** reported revenue of £3.4 billion in Q2 (a 10.4% revenue drop) and £6.6 billion (\$9B) for H1, a 7.8% decline YOY. WPP cited macro uncertainty leading to "cuts to client spending combined with slower net new business and one-off factors." Operating profit margin was 8.2%, a 2.9 point reduction YOY driven by negative operating leverage and severance action, primarily at WPP Media. WPP reported 3.7% headcount reduction in H1, to 104,000. Significant strategic actions included:
 - 1) WPP Media: rebranding, simplification, InfoSum, Open Intelligence
 - 2) Further adoption of WPP Open, now at 69,000 users (85% of client-facing staff) and 5% to 10% uplift on new business conversion
 - 3) New partnerships (Vercel, TikTok, Criteo) and products (Reputation Capital, Decipher Tech)
 - 4) Continuing to attract top talent

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

- **Publicis Groupe** reported revenue of €3.6 billion (\$4.3 billion) in Q2, a 4.6% increase (compared to Q2 2024), following strong Q1 growth of 9.4%. The group reported strong performance across all regions in Q2: US +5.3%, Europe +4.6%, APAC +5.7%. Growth came primarily from Connected Media (data, media, CRM, social, commerce), Intelligent Creativity (creative, PR, production), and Technology (Publicis Sapient), despite ongoing “wait and see” attitudes from brands on capital expenditure and IT spend. Publicis Groupe is in a position of strength, gaining significant market share with record new business wins. Organic growth was 5.9%. Personnel costs as a percentage of net revenue were 66.7% in H1. The group reported an industry-leading margin to 17.4% in H1 while sustaining significant investments (CoreAI platform and talent). Organic growth guidance was increased to close at +5% for the full year as a result of net new business wins.
- **Omnicom Group** reported revenue of \$4 billion, a 4.2% increase with organic growth of 3% and net income of \$257.6 million for Q2. Organic growth by discipline: 8.2% for Media & Advertising, 5% for Precision Marketing, 2.9% for Experiential, and 1.5% for Execution & Support, partially offset by declines of 9.3% for Public Relations, 4.9% for Healthcare, and 16.9% for Branding & Retail Commerce. Organic growth by region: 3% for the United States, 2.5% for Euro Markets & Other Europe, 6.5% for Asia Pacific, 18% for Latin America, 2.4% for Other North America, and 0.9% for Middle East & Africa, partially offset by a decline of 2.5% for the United Kingdom. Operating expenses increased \$232.9 million, or 7%, mostly due to expenses related to the IPG acquisition. Media & Advertising (+8.2%) and Precision Marketing (+5%) together represented 68% of total revenue with combined organic growth in excess of 7%. Gross margin (adjusted EBITA) was 15.3% (up 4%). The antitrust review for the IPG acquisition was cleared by the US Federal Trade Commission. The group won the 2024 Effie Index as the Most Effective Holding Group.
- **IPG** reported total revenue of \$2.5 billion in Q2, or 6.6% lower YOY (\$2.71 billion). Organic net revenue decreased by 3.5%. Organic growth was negative in the US (-2.6%), Asia Pacific (-13.6%), UK (-9.7%), and Continental Europe (-1.6%) but up in Latin America (+1.4%). Organic growth varied by discipline: Media, data and engagement solutions (IPG Mediabrands, UM, Initiative, Kinesso, Acxiom, MRM) were down 3.1%; integrated advertising and creativity-led solutions (McCann Worldgroup, IPG Health, MullenLowe Group, Foote, Cone & Belding [FCB]) were down 6.3%; specialized communications and experiential solutions (Weber Shandwick, Golin, experiential agencies, IPG DXTRA Health) saw an increase of 2.3%. Staff cost ratio, which is total salaries and related expenses as a percentage of revenue before billable expenses, decreased to 63.4% compared to 66.9% for the same period in 2024. The operating margin was 11.2%, a slight improvement mostly due to restructuring and reduced operating expenses. Focus remains on completing the firm's acquisition by Omnicom.

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

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

Noteworthy quotes:

- » “Money can’t save bad ideas.” —Emmanuel Orssaud, Chief Marketing Officer, **Duolingo**
- » “Increasingly our compensation models will shift to outcomes.” —Paolo Yuvienco, Chief Technology Officer, **Omnicom**
- » “We’re entering the age of creative compute where value is measured in speed, precision, and impact. The good news is we are not just sourcing partners anymore; we’re designing the future of marketing.” —Ramzi Chaabane, Global Category Manager, **L’Oréal**
- » “If you’re like most firms, GenAI currently shaves somewhere between 20 and 30% off the time it takes to deliver work to your clients. What do you think that figure will be next year, or five years from now?” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “Creative agency services are valued today by ‘man-hours’ of agency time. What happens when AI reduces man-hours by a factor of 10 or 100 or more? Good-bye man-hours! Good-bye agency revenue!” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “Adapting, unlearning and relearning is going to be the thing that protects us in this moment.” —Tiffany Rolfe, Global Chief Creative Officer and Chair, **R/GA**
- » “Outcome-based pricing isn’t just a strategy, it’s a commitment to share risk and reward with your customers.” —Scott Woody, CEO and Founder, **Metronome**
- » “Mischief has never done time sheets... We value what we make versus the time it took us to make it.” —Greg Hahn, Co-Founder and Chief Creative Officer, **Mischief**
- » “When you price based on time and effort, faster delivery should mean lower fees. That’s the logical outcome of an effort-based pricing model, and clients aren’t wrong to push for it.” —Brian Kessman, Founder and Principal Consultant, **Lodestar Agency Consulting**

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.

- Inspire Brand-owned fast-food sandwich chain **Arby's** selected Publicis-owned BBH and independent Tombras to manage its creative business following a review, splitting its creative duties between the two agencies and replacing 10-year incumbent Fallon. They will partner with media AOR Publicis Groupe.
- National passenger railroad **Amtrak** selected the Nashville-based incumbent Little Buddy Agency as its social creative AOR following a review.
- AI startup **Anthropic** (behind the Claude chatbot and rival to ChatGPT-maker OpenAI) selected IPG Mediabrands as its media AOR in the US. Through IPG Mediabrands' UM, the holding company also manages media buying for Perplexity, an AI-powered search tool.
- **Bad Ass Coffee** selected Brooklyn-based The BAM Connection as its integrated AOR without a review. The agency will handle strategy, campaign development, social, digital, e-commerce, and in-store for the brand.
- Online casino gaming company **Boyd Interactive** selected New York-based Involved Media as its media AOR. The agency will handle all media duties for the firm's brands, including ResortsCasino.com and Stardust Online Casino.
- **Bacardi Limited** selected Publicis Groupe's BBH as its global creative AOR for Bacardi Rum, Mother for Bombay Sapphire, and NCA London (WPP's Ogilvy) for St-Germain, following a review and replacing 10-year incumbent Omnicom Group's BBDO.
- Women-first online dating company **Bumble** selected independent agency Special US as its global creative AOR to oversee a global creative campaign. The agency will partner with the brand's in-house studio.
- **BMW Group** retained Dentsu as its integrated media AOR for BMW, MINI, and BMW Motorrad in 23 markets in Europe. Dentsu media agency iProspect leads the account. The agency will handle full-funnel media planning and buying across all channels, as well as data and technology consultancy across all three BMW Group brands. The assignment also includes support for the launch of Neue Klasse, BMW's new electric vehicle platform.
- Almond-flavored Italian liqueur brand **Disaronno** selected Stagwell Group's 72andSunny Amsterdam to deliver a new brand platform and global campaign.
- **Dole Whip** selected Minneapolis agency Haberman as its integrated AOR following a review. The agency will handle creative and media including connected TV, YouTube, streaming audio, paid social, programmatic display, and influencer partnerships.
- Online gambling company **FanDuel** selected Arts & Letters as its creative AOR, replacing four-year incumbent Wieden+Kennedy. The agency will handle all creative work for FanDuel Sportsbook.
- Wonder Group-owned online food ordering company **Grubhub** selected New York-based independent Walrus as its creative AOR following a review. The brand previously handled work in-house. The agency will handle all creative duties and partner with the media AOR, IPG's UM.
- Outdoor apparel brand **Gore-Tex** selected Mediaplus Group as its global media AOR following a review. The agency will handle all media duties in EMEA and North America, including digital, video, OTT, programmatic, and search, in partnership with its agency subsidiary MediaScale.
- Brazilian flip-flop brand **Havaianas** selected Gut as its first global creative AOR following a review. The brand previously worked with a local Brazilian agency. Havaianas's Brazilian business will continue to be handled by AlmapBBDO. The agency will handle global brand strategy, working in tandem with Havaianas's São Paulo-based team.
- Pharma giant **Haleon** kicked off a review of its creative work, with the goal to consolidate work currently distributed across IPG, WPP, and Publicis Groupe. Per COMvergence, Haleon spent \$1.2 billion on global media in 2024.
- Pizza chain **Hungry Howie's** selected independent agency Gravity Global as its new integrated AOR following a review and replacing incumbent Doner and a few other shops. Gravity Global will handle strategy, media, creative, and social duties. The agency is expected to leverage its Gravity One division focused on millennials and Gen Z audiences.
- Yum! Brands-owned West Coast burger chain **Habit Burger & Grill** selected Brainlab-owned Exverus Media as its US media AOR following a review, replacing one-year incumbent Publicis Groupe's Connect (affiliated with Spark Foundry). The agency will partner with creative AOR Barrett Hofherr.
- Deckers Outdoor Corp.-owned sneaker brand **Hoka** kicked off a global creative agency review. Three-year incumbent Stagwell's Anomaly is expected to defend.
- Berkshire Hathaway-owned restaurant chain **International Dairy Queen** selected Colle McVoy as its creative AOR following a review, acting as integrated agency team lead, and replacing incumbent SPCSH. Colle McVoy will handle creative strategy, social, and digital.
- British sneakers and sportswear firm **JD Sports** selected Chicago-based independent, woman-owned creative and media agency Empower Media as its first media AOR. The agency will handle all media duties in the US, leveraging its offices in Chicago, Cincinnati, Atlanta, New York, Houston, and Palm Beach.

- Shell USA-owned company **Jiffy Lube International Inc.** kicked off a review of its creative business. Incumbent Stagwell's Doner is expected to defend.
- Tata Group-owned British multinational automobile manufacture **Jaguar Land Rover** kicked off a review of its global integrated creative business. Four-year incumbent Accenture Song is expected to defend. Spark44 serves as Jaguar's in-house creative agency, while Hearts & Science handles media duties.
- **Keurig Dr Pepper** selected Publicis-owned agency BBH USA as its creative AOR on two of its flagship brands, 7UP and RC Cola. The brand recently dissolved its in-house agency, Liquid Sunshine.
- **Loews Hotels** selected digital marketing agency New Engen as its digital AOR in a move to drive strategic digital impact across its portfolio outside of Orlando. The agency will handle CTV and streaming, paid social, paid search, advanced analytics, and measurement.
- The luxury giant **LVMH** shifted part of its European media business from Publicis to Havas to geographically rebalance its media agency partnerships within its current global portfolio. Havas's Argentina-based agency Forward Media took on additional European markets.
- Defense contractor **Lockheed Martin** kicked off a review of its creative business. Decade-long incumbent IPG's McCann Detroit is expected to defend.
- Confectionery giant **Mars Inc.** selected Publicis Groupe as its global integrated AOR with a bespoke team called OneMars, following a review and replacing incumbents from IPG, Omnicom Group, and WPP, mostly seven-year incumbent WPP Media's EssenceMediacom for media planning and buying. OneMars will handle all duties, including media, production, commerce, paid social media, and influencer marketing in 70+ markets. The brand also consolidated global brand PR with IPG, led primarily by IPG's Weber Shandwick Collective. Creative duties remain with Omnicom's BBDO and DDB as well as WPP's T&P.
- Fast-food giant **McDonald's** selected Translation (in partnership with music distribution company UnitedMasters) as its creative AOR for the African American consumer market following a review and replacing incumbent Burrell Communications.
- Financial services giant **Mastercard** selected WPP Media as its global media AOR following a review. The agency will handle media strategy, planning, and buying in 70 markets, replacing 11-year incumbent Dentsu's Carat. As part of the move, WPP-owned Ogilvy will handle social listening. WPP Media will partner with the brand's long-term creative and social AOR, IPG's McCann, and leverage its advanced data and AI (Open Intelligence) capabilities.
- CPG giant Nestlé's **Nespresso** selected Publicis Groupe's Leo following a review and replacing 19-year incumbent IPG's McCann. Nespresso will continue to work with McCann Worldgroup and IPG agencies in other capacities, including FutureBrand, UM, Weber Shandwick, and MRM.
- **NASCAR** kicked off a review of its creative business, looking for "a nimble agency with a track record of handling a broad mix of work." The brand has historically worked with small, independent agencies. The agency will partner with the brand's media AOR, Crossmedia.
- Specialty bakery chain **Nothing Bundt Cakes** selected Dallas-based agency Moroch as its integrated (creative and media) AOR, replacing incumbent PMG. The agency will handle lead performance-focused media and marketing duties.
- Premium pet food brand **Orijen** (Champion Petfoods, part of Mars Petcare) selected TDA Boulder as its global creative and strategy AOR. The agency will handle global creative campaign and strategy efforts in the US, Canada, European Union, Mexico, South America, and China.
- **OpenAI** selected Omnicom Media Group's PHD as its global media AOR. The agency will handle global media buying and planning for OpenAI and its ChatGPT brand. IPG Mediabrands handles media for competitors Anthropic and Perplexity. Creative duties have historically been handled in-house or by external agencies such as Accenture Song.
- **OtterBox**, an American privately owned consumer electronics accessory company, selected Digitas as its new global creative AOR following a review. The agency will handle the Made for Yes platform to reposition the brand for Gen Z.
- **Paramount** consolidated its US Paramount+ media account with IPG Mediabrands, following a review and replacing incumbent Horizon Media. For the large part of its media business, the brand selected Publicis, replacing incumbent WPP Media.
- Self-storage company **Prime Storage** selected Generator Media as its media AOR following a review. The agency will handle strategic planning, buying, advanced measurement, and ongoing optimization across digital, social, programmatic, and specific high-impact channels.
- **PurposeBuilt Brands**, a global maker of specialty cleaning products, selected Milwaukee-based Hanson Dodge as its creative AOR for its Weiman brand without a review, expanding the remit of the agency (beyond Green Gobbler).
- PepsiCo's soda brand **Poppi** selected independent agency Mirimar as its creative AOR following a review. The brand historically handled marketing in-house. The agency will handle creative duties and will partner with Tinuiti, Poppi's media AOR.
- **PayPal** selected Publicis Groupe as its global media AOR following a review and replacing two-year incumbent WPP Media (then GroupM). Publicis previously handled PayPal's creative business through its BBH USA agency.
- LVMH-owned luggage German luxury luggage and lifestyle brand **Rimowa** selected Globant-owned Gut as its global AOR following a review and replacing incumbent Stagwell's Anomaly. The Gut Amsterdam office will run the account. GUT will leverage offices in Miami, Buenos Aires, São Paulo, Toronto, Mexico City, Los Angeles, Amsterdam, Madrid, New York, and Singapore.

- Men's premium activewear brand **Rhone** selected Kepler as its media AOR. The agency will handle all media duties, including full-funnel strategy, digital activation, and measurement across all major platforms.
- Fintech company **Rocket Companies** selected Viral Nation as its first social media AOR following a review. The agency will partner with Mirimar, the creative AOR, and Publicis-owned Zenith, the brand's media AOR.
- Western lifestyle apparel brand **Sendero Provisions** selected Austin-based agency Bakery as its creative and cultural AOR following a review. The agency will handle all creative and integrated advertising duties, including content production, as well as media through Bakery's sister media agency, Ken.
- AI-powered enterprise workflow management platform **ServiceNow** selected Dentsu X as its new global media AOR, replacing one-year incumbent PMG.
- One of Italy's largest coffee brands, **Segafredo Zanetti** (part of Massimo Zanetti Beverage Group), selected BBH as its global creative AOR following a review. The agency will handle brand positioning and build a communications platform for the brand.
- Cloud software giant **Salesforce** selected Dentsu's iProspect as its global performance media AOR following a review, replacing the incumbent in-house agency. The agency will partner with IPG's Initiative, the firm's brand AOR.
- Charlestown, Massachusetts-based sparkling water **Spindrift** selected The Brand Guild as its integrated AOR following a review. The agency will handle influencer marketing and PR for the brand from its offices in Washington, DC, and New York.
- Retailer of modern home furnishings **Scandinavian Designs** selected Quad/Graphics as its integrated AOR, working with two Quad agencies (Betty for creative and Rise for media) as part of a consolidation.
- Yum Brands-owned chain **Taco Bell** selected Quality Meats to join its creative roster (which includes Deutsch) following a review. The agency will handle a range of creative services.
- Telecommunication giant **T-Mobile** selected Monks as its first social media AOR following a review, previously handled by several roster agencies including lead creative agency Dentsu Creative, VM, and Monks. The agency will handle all social duties, including leading paid and organic social content for T-Mobile's brands and businesses. VML-owned Village will continue to lead creator marketing for T-Mobile while Open Influence handles creator marketing for Metro by T-Mobile.
- **Tropicana Brands Group** selected Fig as its creative AOR following a review, replacing incumbent Cramer-Krasselt, and expanding the work done by the agency with Naked Smoothies. The agency will handle all creative duties for Tropicana, Naked, and Izze.
- Yogurt brand **The Collective** selected Five by Five's social media shop TSA as its UK influencer and social media AOR following a review. There was no incumbent. The agency will handle all activities related to Instagram and TikTok, as well as content planning and production, influencer management, and paid social activity.
- **TJX Cos.** (parent company of chains including TJ Maxx) selected new creative AORs for its **HomeGoods** and **Sierra Trading Post** brands. HomeGoods selected Publicis Groupe's Fallon, replacing incumbent IPG's McCann, and Sierra Trading Post selected BarkleyOKRP, replacing incumbent Omnicom Group's adam&EveDB, following a review.
- Luxury jewelry line **Tacori** selected San Diego-based agency Gestalt as its creative AOR. The agency will handle creative cross-platform, in-store design, partnerships, and platform updating.
- **Ulta Beauty** selected VaynerMedia as its lead customer-first social and creative AOR without a review. The agency will handle all creative with a social-first approach, providing social-led insights that will then inform the brand's creative work across the funnel, and partner with the brand's in-house team.
- **Under Armour** selected OMD APAC as its media AOR following a review. The agency will handle brand and performance media planning and buying across China, Korea, and South APAC.
- **Valley Bank** selected Doner as its strategic and creative AOR following a review. The agency will handle media buying and planning.
- **Volkswagen of America** selected global digital consultancy CI&T as its North American digital AOR, replacing five-year incumbent WPP in North America. The agency will handle strategy, design, and development for VW.com and the myVW app.
- European telecom giant **Vodafone** selected Dentsu agency Carat as its media buying AOR in 11 markets in Europe, the Middle East, and Africa (EMEA), a three-year contract, following a review. Carat retains the account after its initial three-year engagement. The agency will also continue to support Vodafone's efforts to bring more media buying in-house.
- Global apparel and footwear marketer **Wolverine Worldwide** selected the Havas Media Network (HMN) as its media AOR following a review. HMN was the two-year incumbent agency following a vendor consolidation and is therefore renewing its contract with the brand. The agency will handle hyperlocal planning, community marketing, and performance optimization.
- Restaurant chain **White Castle** selected Omnicom GSD&M as its new integrated AOR following a review and replacing incumbents Crossmedia and Omnicom Group's Merkle+Partners. The agency will handle creative, strategy, media, experiential, and social duties. Blue Chip remains White Castle's shopper marketing AOR.
- Wikimedia Foundation-owned **Wikipedia** selected Spin as its first social media AOR. The agency will handle social-first videos and social content for the organization.

Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Amtrak	Little Buddy	Social Creative AOR	US, Canada	Little Buddy (retains duties)	Y
ANTHROPIC	Anthropic	Unk	Media AOR	US	IPG Media	Unk
	Arby's	Fallon	Creative	Unk	Tombras	Y
	Arby's	Fallon	Creative	Unk	BBH	Y
	Bacardi Limited (Bacardi Rum)	BBDO	Creative AOR	Global	BBH	Y
	Bacardi Limited (Bombay Sapphire)	BBDO	Creative AOR	Global	Mother	Y
	Bacardi Limited (St. Germain)	BBDO	Creative AOR	Global	NCA London (WPP's Ogilvy)	Y
	Bad Ass Coffee	Unk	Integrated AOR	US	The BAM Connection	N
	BMW Group (BMW, MINI, BMW Motorrad)	Dentsu	Integrated Media AOR	EU	Dentus's iProspect (retains duties)	Unk
BOYD	Boyd Interactive	Unk	Media AOR	US, Canada	Involved Media	Unk
	Bumble	None/In-House	Creative	Global	Special US	Y
DISARONNO	Disaronno	Unk	Brand Platform	Global	72andSunny Amsterdam	Unk
	Dole Whip	Unk	Integrated AOR	Unk	Haberman	Y
	FanDuel	Wieden+Kennedy	Creative AOR	US	Arts & Letters	Unk
	Gore-Tex	Unk	Media AOR	Global	Mediaplus Group	Y
GRUBHUB	Grubhub	None/In-House	Creative AOR	US, UK	Walrus	Y
Habit	Habit Burger & Grill	Publicis Groupe's Connect	Media AOR	US	Exverus Media	Y
HALEON	Haleon	IPG, WPP and Publicis Groupe	Creative	Global	IP	Y
	Havaianas	Local Agency	Creative AOR	Global	Gut	Y
	Hoka	Anomaly (expected to defend)	Creative	Global	IP	Y
	Hungry Howie's	Stagwell's Doner (and others)	Integrated AOR	US	Gravity Global	Y
	International Dairy Queen	SPCSHP	Creative AOR	Unk	Colle McVoy	Y
JLR	Jaguar Land Rover	Accenture Song (expected to defend)	Integrated Creative	Global	IP	Y
	JD Sports	None	Media AOR	Unk	Empower Media	Unk

Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Jiffy Lube International Inc	Stagwell's Doner (expected to defend)	Creative	Unk	IP	Y
	Keurig Dr. Pepper (7UP, RC Cola)	In-House	Creative AOR	Unk	BBH USA	Unk
	Lockheed Martin	IPG's McCann Detroit (expected to defend)	Creative	Unk	IP	Y
	Loews Hotels	Unk	Digital AOR	US	New Engen	Unk
	LVMH	Publicis	Media	EU	Havas	Unk
	Mars Inc.	IPG, Omnicom Group and WPP	Integrated AOR	Global	Publicis Group	Y
	Mars Inc.	IPG (consolidation)	Brand PR	Global	Weber Shandwick Collective	Y
	Mastercard	Dentsu's Carat	Media AOR	Global	WPP / Ogilvy	Y
	McDonald's	Burrell Communications	Creative AOR	US	Translation	Y
	NASCAR	None/In-House	Creative	Unk	IP	Y
	Nespresso	IPG's McCann	Creative	Global	Publicis Groupe's Leo	Y
	Nothing Bundt Cakes	PMG	Integrated (Marketing and Media) AOR	US, Canada	Moroch	Unk
	OpenAI	Accenture Song / In-House Agencies	Media AOR	Global	Omnicom Media Group's PHD	Unk
	Orijen	Unk	Creative / Strategy AOR	Global	TDA Boulder	Unk
	OtterBox	Unk	Creative AOR	Global	Digitas	Y
	Paramount	Horizon Media	Paraount+ Media	US	IPG Mediabrands	Y
	Paramount	WPP Media	Media	Global	Publicis	Y
	PayPal	WPP Media	Media AOR	Global	Publicis Groupe	Y
	Poppi	In-House	Creative AOR	Unk	Mirimar	Y
	Prime Storage	Unk	Media AOR	US, Canada	Generator Media	Y
	PurposeBuilt Brands	Unk	Creative AOR	Unk	Hanson Dodge (HD)	N
	Rhône	None/In-House	Media AOR	Unk	Kepler	Y
	Rimowa	Stagwell's Anomaly	Integrated AOR	Global	Gut	Y
	Rocket Companies	None	Social Media AOR	Unk	Viral Nation	Y

Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Salesforce	<i>In-House</i>	Performance Media AOR	Global	Dentsu's iProspect	Y
SCANDINAVIAN — DESIGNS —	Scandinavian Designs	Unk	Integrated AOR	Unk	Quad/Graphics (consolidation)	Unk
	Segafredo Zanetti	Unk	Creative AOR	Global	BBH	Y
	Sendero Provisions	Unk	Creative / Cultural AOR	Unk	Bakery	Y
	ServiceNow	PMG	Media AOR	Global	Dentsu X	Y
	Spindrift	Unk	Integrated AOR	Unk	The Brand Guild	Y
	T-Mobile	Dentsu Creative, VM and Monks (and others)	Social Media AOR	Unk	Monks	Y
	Taco Bell	Deutsch (and others)	Joining Creative Roster	Unk	Quality Meats	Y
TACORI	Tacori	Unk	Creative AOR	Unk	Gestalt	Unk
	The Collective	<i>None</i>	Influencer and Social Media AOR	UK	Five by Five's TSA	Y
	TJX Cos. (Sierra Trading Post)	Omnicom Group's adam&EveDDB	Creative AOR	Global	BarkleyOKRP	Y
	TJX Cos. (HomeGoods)	IPG's McCann	Creative AOR	Global	Publicis Groupe's Fallon	Y
	Tropicana Brands Group	Cramer-Krassel	Creative AOR	Unk	Fig	Y
	Ulta Beauty	<i>None</i>	Social and Creative AOR	Unk	VaynerMedia	N
	Under Armour	Unk	Media AOR	China, Korea, and South APAC	OMD APAC	Y
	Valley Bank	Unk	Strategic and Creative AOR	US	Stagwell's Doner	Y
	Vodafone	Carat	Media Buying AOR	EMEA	Carat (retains duties)	Y
	Volkswagen of America	WPP	Digital AOR	North America	CI&T	Unk
	White Castle	Crossmedia and Omnicom Group's Merkley+Partners	Integrated AOR	Unk	Omnicom GSD&M	Y
	Wikipedia	<i>None</i>	Social Media AOR	Unk	Spin	N
	Wolverine Worldwide	Havas Media Network (HMN)	Media AOR	Unk	Havas Media Network (HMN) (retains duties)	Y

Agency Mania 2nd Edition

Named one of strategy+business magazine's **Best Business Books**.

The advertiser/agency relationship is under incredible pressure, and the future of the advertising industry is uncertain. The entire marketing ecosystem is being tested.

At a time of unprecedented change and complexity in marketing, *Agency Mania* will transform the way you look at client/agency relationships. It invites you to build sustainable partnerships that deliver unmatched work and results. Scan below for your copy.

Agency Mania 2nd Edition is also available at many major bookstores, including Amazon.com, Barnes & Noble, Target, and other retailers.



Scan for
a copy of
*Agency
Mania 2nd
Edition*



Scan to
visit our
website



Scan to
subscribe
to our
newsletter



Scan to
view our
article
archive



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.

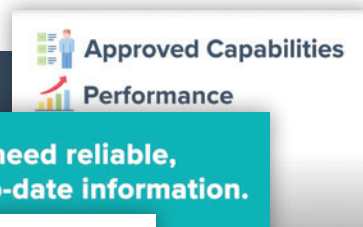
Bruno Galpois, Co-Founder and Principal, Agency Mania Solutions

Need to manage your Agency Roster?

You already have the right partnerships in place, but do you need to better manage your existing roster of agencies?

There is a better way.

Check out our video about **RosterDeliver**.



You need reliable,
up-to-date information.

