

Industry Update

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

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Contributed by: A&MPLIFY by Alvarez & Marsal

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EXECUTIVE SUMMARY: September - October recap

AI is rewriting marketing's talent equation. Large agencies, ad-tech firms, and platforms are automating routine work to unlock strategic creativity and, in the process, elevating CMOs into true transformation architects. Agentic AI, self-serve operating systems, and brand-side builds (from production accelerators to performance intelligence) are shifting resources toward strategy, design, and decisioning.

The craft still matters: Straight-talk creative feedback, relentless brand consistency, and the fusion of data with emotion are powering the next wave of ideas. Work is being rewired. Retail media becomes full-funnel and "phygital" (the combination of physical and digital); benchmarking moves from cost control to clarity and accountability; and procurement shifts from "price" to platform-native value.

Outcome-based and deliverables-led models gain momentum as leaders decide what to in-source versus scale with partners. Financials add urgency. Ad spend keeps climbing, inflation in media costs persists, and Big Tech's AI investments and user scale reset expectations. Pitch dynamics intensify (lengthy reviews, global consolidation), while M&A, new collectives, and rebrands reshape capability maps across creative, media, data, and production.

Bottom line: The winners staff for imagination and instrument for impact. They codify expertise in software, measuring what matters, and paying for outcomes, not activity.



Bruno Gralpois

Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources

Large agencies, ad-tech firms, and platforms are doubling down on AI to eliminate routine tasks and unleash strategic creativity. AI is reshaping the marketing landscape—from automation and personalization to precision media and performance intelligence—turning CMOs into transformation architects. Publicis Groupe now attributes more than 70% of its revenue to AI-powered work, while WPP, Accenture, and Google are investing billions to integrate agentic AI across operations. Horizon Media's Blu platform, MiQ's Sigma, and tools from PubMatic and Similarweb are redefining programmatic buying and media optimization. At the same time, brands like Mondelez, Bayer, and General Motors are using AI to cut costs, speed production, and boost creative quality. Industry events highlight a broader evolution: the fusion of data and emotion, the rise of outcome-based commercial models, and a creative renaissance fueled by AI insights. As global ad spending by the top 50 advertisers jumped 6.6% in 2024 to \$291 billion, leaders are asking where to in-source instead of partner—and how to harness AI not just for efficiency, but for growth.

- Key takeaways from the **2025 Association of National Advertisers Masters of Marketing** conference, the world's largest marketing conference, included: a change in the CMO role to "transformation architect"; the use of AI in creativity but also in precision targeting and personalization; relentless consistency in brand building; media waste reduction; and decisions about what core strategic capabilities, such as strategy, social media and analytics, to in-source instead of outsource to agencies.
- Stagwell issued its **ANA Masters of Marketing Recap "Transformation, Not Trends: 5 Shifts Shaping Marketing,"** highlighting the following:
 - 1) Brand building is the new performance play
 - 2) From reach to resonance (audience + context + relevance = resonance)
 - 3) Purpose that performs
 - 4) From AI experiments to enterprise change
 - 5) Digital tools, human rules
- Per the **Ad Age Brand Report 2025**, the world's top 50 advertisers increased 2024 spending by 6.6% to \$291 billion. The top 50 US advertisers boosted 2024 ad spending 7% to \$136 billion. Median ad spending growth—the midpoint growth rate—for the top 50 US advertisers was 5.4% last year. Amazon remained the biggest advertiser, both in the US and globally, for the fourth consecutive year, with \$21.4 billion worldwide on advertising and promotion in 2024. Two China-focused internet-centric brands—Alibaba Group Holding and PDD Holdings—ranked among the world's top 5 ad spenders. The US is home base for a majority of the top US and global advertisers, with 39 companies out of the top 50 US advertisers headquartered in America.
- Per the **AdForum Worldwide Summit**, the top 6 industry shifts underway are:
 - 1) The return to full integration after years of decoupling media, creative, and tech ("The future is about bridges, not islands")
 - 2) Social media's strategic elevation (merging community, culture, and commerce)
 - 3) The emotion-data paradox (human empathy, intuition, and emotional resonance)
 - 4) AI: the great equalizer and differentiator
 - 5) The commercial model revolution (outcome-based, subscription, and value-linked pricing, aligning fees to performance and business growth)
 - 6) A creative renaissance is underway (emotion as a growth driver, grounding strategies in human connection rather than pure performance metrics)
- Per MediaSense/Ad Age, **a standard pitch/review process** takes 17 weeks (way too long!) and includes the following:
 - Initiate process and develop credentials request/RFI (Weeks 1–2)
 - Release RFI and agencies (Weeks 3–5)
 - Analyze responses (Week 6)
 - Report and alignment (Week 7)
 - Develop assignment (Weeks 3–6)
 - Develop fee templates, MSA guidelines (Weeks 4–6)
 - Release strategic assignment (Week 8)
 - Agency response time (Weeks 9–13)
 - Q&A sessions with agencies (Week 10)
 - Chemistry/strategic "tissue" sessions and fees due at agencies' locations (Weeks 11–12)
 - Final sessions at client location (Week 13)
 - Analyze responses (Week 14)
 - Analyze commercial proposal (Weeks 12–14)
 - Finalist negotiation (Week 15)
 - Top-to-top meetings (Week 15)
 - Appoint agency (Week 16)
 - Begin transition (Week 17)
- Digital marketing performance agency Labelium rebranded as **Cosmo5**. The global marketing agency, which offers media, creative, commerce, data, and technology services, has 30 offices in 18 countries (HQ in Paris) with a team of 1,300 overseeing more than \$2 billion in global media spend for clients such as Ancestry, L'Oréal, LVMH, LG, Micron, LEGO, Meta, Warner Bros, and Zadig & Voltaire.

- Per Michael Farmer of Farmer & Company, in light of the **financial pressure of the AI phenomenon**, agencies should advise clients of the following:

- 1) “We will use AI aggressively to lower our costs and replace menial jobs with AI solutions”
- 2) “We would like to reinvest the savings from our AI usage into senior consulting-like brand analysts and strategists, who will carry out work, on your behalf, to figure out how to overcome brand stagnancy and restore brand growth”
- 3) “We believe that we can rekindle brand growth once we understand all the factors that have inhibited growth for the past 15 years”
- 4) “We expect to recommend changes in media spend, media mix, and creative scopes of work from their current configurations into something else that has a higher probability of succeeding”
- 5) “We would like your support as we pivot from what has not worked to date to something that has a higher probability of working”
- 6) “We would like to keep our fee levels where they have been while we reinvest AI savings into consulting-like capabilities and services”

New agencies or capabilities, restructurings, and reorganizations:

- Nina Chandé, formerly of Unilever, launched a future-ready business consulting and services firm called **Like No Other** which has a core mission to help brands, agencies, and tech vendors unlock procurement potential, protect margins, and accelerate growth. The offering is based on four core propositions:
 - 1) Procurement Accelerator 4.0—procurement training to build commercial, negotiation, and AI confidence
 - 2) Negotiation Desk—on-call support for live deals, pricing, and procurement strategy
 - 3) AI Sprint—enabling AI solutions to transform and scale commercial models and partnerships
 - 4) Procurement Maturity Assessment—unlocking procurement’s role in growth and innovation

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

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

Bruno Galpois
Co-Founder & Principal
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agencymania.com

AGENCY MANIA SOLUTIONS

Click here to check out Bruno Galpois’s latest article on understanding benchmarking to deliver the best work within a partnership.

- Integrated-marketing firm **The Abbi Agency** launched an influencer-marketing service unit. The Reno, Nevada-based agency, which also has offices in Las Vegas and Helena, Montana, works for “world-class travel destinations, national health initiatives and Fortune 500 heavyweights” (Visit Carmel, Carnival Cruise Line, Aramark Destinations, the Yosemite Conservancy, Google, Tesla, Travel Nevada). The agency was Midsize Agency of the Year by Bulldog PR and Advertising Agency of the Year by the AAF Western Region.
- F1 driver Charles Leclerc launched a creative studio called **Sidequest**, bridging sports and culture. The firm, with offices in Monaco and Amsterdam, combines film, photography, design, and music. Clients include Chivas Regal, APM Monaco, Celsius, Eight Sleep, and LEC.
- Brand agency DesignStudio rebranded as **Further** a year after joining forces with creative studio Pixel Artworks and motion design specialists Analog. The firm serves clients such as Airbnb, Riot Games, EA Sports, and Eurostar from its offices in New York, London, and Dubai.
- Stagwell creative agency network 72andSunny launched the **72andSunny Creative Collective**, combining 72andSunny, Forsman & Bodenfors, Canada-based Bruce Mau Design, and California-based production company Hecho Studios under one creative banner to expand its global footprint and provide more scale and flexibility to clients. Forsman & Bodenfors’ Toronto and Singapore offices rebranded as 72andSunny as part of the move.
- Advantage United Commerce and Amp Agency merged to launch **AMP (Advantage Marketing Partners)** in a move to offer full-scale services to its clients (BF Goodrich, Ferrero & Bayer, Starbucks, Southwest Airlines, and others). The firm offers services including strategy and intelligence; creative and content; retail and commerce; media and measurement; digital and social; and ad activation and amplification.
- A new creative agency called **52** launched with hubs in Miami and Buenos Aires, started by a former Republica Havas executive. Clients include technology, travel, and home appliances brands.
- LA-based marketing group **Acceleration Community of Companies** launched a synthetic audience platform for testing creative and messaging, simulating audience responses in seconds and synthesizing census data, behavioral patterns, ethnographic research, and “proprietary netnographic signals” drawn from online audience behavior.

AI (Artificial Intelligence):

- Per Madison Logic and The Harris Poll, 73% of **B2B marketing** decision-makers see AI-generated creativity as the future of advertising, with 85% currently investing in machine learning and AI.
- Per the **2025 State of Marketing AI Report** by the Marketing AI Institute, 60% of marketing teams are now piloting the use of AI or scaling out AI projects. 82% of marketers hope AI will reduce time spent on repetitive data-driven tasks. Another expectation is getting more actionable insight from marketing data (65%). Reducing costs was only #7 on the list (52%).
- San Francisco startup **AdsGency AI** raised \$12 million in a seed investment round to build an agentic AI operating system and agency for advertisers with AI agents running campaigns autonomously, including generating ads and placements. Tasks are to include strategic planning, multimodal content generation, and ad placement across channels, attribution, and optimization and integration with ad channels, including TikTok, Instagram, Pinterest, Reddit, and Google.
- Per **Publicis Groupe**, over 73% of its third-quarter revenue came from what the company defines as “AI-powered” work. In the connected media area (which includes data, media, CRM, social, and commerce), 80% of its revenue came from AI-powered work. In the intelligent creativity segment, a third of the revenue came from AI-powered work. Building agentic networks (created by Publicis Sapient, which represents 15% of the group’s revenue) for clients accounts for 10% of Publicis’s business.
- **WPP and Google** announced a five-year expansion of their partnership, which features a \$400 million spending commitment from the holding company for Google technologies, including new, bespoke AI solutions built with Gemini; Google’s suite of AI models; rapid, bespoke AI model development; secure, privacy-first data collaboration; video and image production enhancements; integration of Google’s cutting-edge AI directly into WPP Open; and enhanced client service by integrating Google’s AI into WPP workflows.
- One of the world’s largest professional services firms, **Accenture**, laid off more than 11,000 employees, spending over \$2 billion in severance cost amid a significant global restructuring related to increased automation and the growing role of AI. The workforce now has 77,000 AI and data professionals. The company reported that generative AI projects accounted for \$5.1 billion in new bookings in the last financial year, up from \$3 billion the previous year. This announcement was followed by a wave of layoffs in the tech sector, including Salesforce, Amazon, and Meta—all linked to efficiencies realized by AI.
- Clothier **J.Crew**’s use of undisclosed AI-generated imagery sparked consumer controversy and claims of a lack of brand authenticity and transparency after several lifestyle images were posted on Instagram. The brand used AI.S.A.M, a London-based AI photographer that “merges the real with the artificial.”

- Per Orbit Media Studios, research indicates that **content marketers** who use AI take 10% less time on average to write a content marketing article (3 hours, 24 minutes vs. 3 hours, 48 minutes) than those who don't use AI.
- **AI “actress” Tilly Norwood**, the creation from AI talent studio Xicoia, a spin-off of Eline Van der Velden's AI production studio Particle6, has been the center of a controversy after the AI model attracted the attention of multiple talent agents after her first role in the comedy sketch “AI Commissioner.” SAG-AFTRA the union representing actors and other performers, stated that it is “opposed to the replacement of human performers by synthetics” and that “creativity is, and should remain, human-centered.”
- The World Federation of Advertisers (WFA) released its “**AI for Marketing Procurement Purposes**” white paper, indicating that procurement professionals anticipate a wide range of GenAI applications, including in RFPs, negotiations, and external market assessment; compliance and risk mitigation; operational excellence, such as automating certain procurement processes and improving workflows; and category learning and capability development. The white paper states that “the traditional commercial model—built on timesheets, retainers, and FTEs—is increasingly at odds with the way marketing works today. A shift towards outcome- or output-based remuneration, moving away from FTE/hours or mixed models that emphasize the latter could be one result.”
- Per the WFA, **AI's impact on commercial models** is real. 22% of marketing procurement executives say the benefits have been clear for “some time,” while 32% report they are only just beginning to experience them—whether through faster processes, testing, or actual content delivery. 20% say they have started to develop some of their remuneration models, and 61% plan to do so. 44% are concerned about the environmental impact of new AI tools and approaches. 64% think the use of AI may increase environmental effects of their marketing activities, while 82% feel that the full environmental cost of AI was currently unknown. Only 5% are already measuring the impact of AI tools/vendors.
- WPP launched a new version of its marketing operating system, WPP Open, for smaller clients, called **WPP Open Pro**. The self-serve marketing platform provides integrated AI-powered tools to allow brands to build plans, develop strategies, evaluate audiences and the competition, generate insights, and produce and publish campaigns on major ad platforms on their own, at scale and in record times compared to traditional methods.



DROWNING IN DATA, STARVING FOR INSIGHT

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

This unified view directly addresses the tech integration crisis and creates shared accountability across marketing, sales, and agency teams.”

– Bruno Gralpois, Co-founder and Principal, Agency Mania Solutions

WHITE PAPER

Drowning in Data, Starving for Insight

Contributed by: A&MPLIFY by Alvarez & Marsal

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

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

There is the existential crisis facing every marketing leader. Global data creation is exploding past 180 zettabytes this year. We're richer in data than at any time in history, but poorer than ever in insight. That's the paradox: You're not starved for numbers; you're drowning in them. But most organizations can't turn their vast wealth of information into actionable business insights. Only CMOs who can draw a straight line from marketing activity to EBITDA will survive. The rest? Cost centers waiting to be cut. The time for ruthless KPI accountability has begun.

To read the entire white paper, [click here](#).

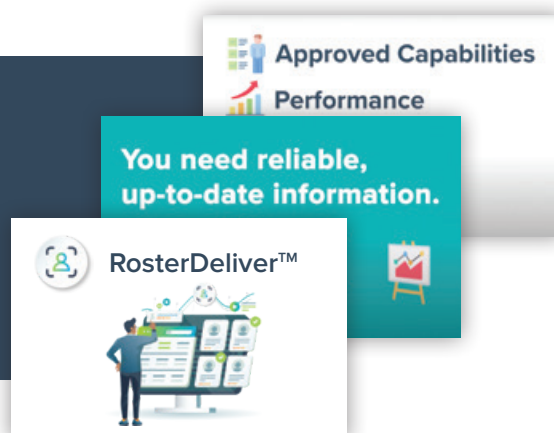
- A new tech platform called **Ad Legends** launched to “hire out” the digital personas of famous advertising creatives to agencies and brands. The creative style, past work, and philosophy of a legend are built into an AI agent to help generate ideas. The real-life legend earns royalties based on how often their persona is used. The firm, which operates as an SaaS-based agency hybrid, calls itself “the first fully functional AI-powered advertising agency” that gives instant access to top-tier creative thinking without human involvement.
- **Walz Tetrick Advertising** launched an AI-dedicated operation called Fuel Labs as a strategic advisor for businesses seeking to harness AI’s potential. The entity works across the agency’s creative, media, and strategy teams to integrate AI capabilities into client projects but also develop proprietary solutions for clients across retail and manufacturing sector as well as AI-enabled models and platforms.
- **CreativeX** launched a benchmarking tool to help brands measure the ROI of creator ad spend by comparing their content against industry benchmarks. The tool assesses how creator content performs against best practices and shows where budgets are wasted, allowing brands to optimize their strategies and prove the effectiveness of their investments. For example, by providing a Creative Quality Score (CQS), the tool helps brands improve their creative output, as a 10% increase in CQS can lead to a 6.3% reduction in Cost Per Completed View (CPCV), according to CreativeX.
- An industry coalition launched an open technology protocol called **Ad Context Protocol** (AdCP) to standardize how AI agents communicate with one another and carry out tasks on behalf of humans. The open standard for agentic advertising aims to make AI agent technology more consistent across ad platforms and allow for interoperability, such as providing direct access to inventory to advertisers who can access specific publisher audiences and inventory directly without navigating complex programmatic infrastructure. Ebiquity, Yahoo, PubMatic, Optable, Scope3, Swivel, and Triton Digital are founding members of the coalition.
- Pharmaceutical giant **Bayer** has been using CreativeX, the creative data and automation platform, for years to produce content at scale, evaluating its agencies’ creative output quality and effectiveness, scoring them against benchmarks before going to market while spotting low-quality creative receiving large budget to make adjustments. The brand states that it increased its creative quality coverage from 20% to 70% of its digital assets in one year.
- Packaged-food manufacturer **Mondelēz** uses a GenAI tool developed in partnership with Publicis Groupe and IT firm Accenture to cut costs for the production of marketing content by 30% to 50% and speed up how long it takes to produce content. The firm spent over \$40M to develop that capability, and it is expected to be used in social media, video production, retail product pages, and more.
- The **General Motors** proprietary AI engine Metropolis produced on-brand, photo-realistic assets in minutes, eliminating reshoots and allowing GM to scale thousands of on-brand, hyperpersonalized images monthly that are optimized in real time. The platform is now evolving into a fully agentic workflow, able to generate entire commercials, from insights to finished films, significantly faster and cheaper.
- **Virgin Voyages** partnered with Google’s Gemini Enterprise platform to develop a host of marketing and customer experience agents. The firm states that it operates more than 50 AI agents to assist internal teams as part of its personalized marketing (such as emails and landing pages) and customer experience efforts, reducing its annual creative agency spend by 35% and time to market from 5 to 6 weeks to 5 to 10 days.

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**.



Noteworthy quotes:

- » “The benefits of improving client brand growth rates by as little as 1% per year would generate enormous amounts of value. Those agencies who succeeded in cracking the brand growth problem could easily return their relationships into long-term marriages with premium prices for agency services. Isn’t this what the consulting firms have accomplished over the past 40 years? How else do consulting firms achieve their billing multiples of 5-6x the cost of their expensive people, while agencies languish at 2x multiples for their very cheap people? Consulting firms focus on helping their clients perform better. It’s that simple.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “For a long time, the CMO role, the role of the marketer, was about the stories we tell, the splash we make, the ROI we drive. We need to do that, but we’re being asked to step into a bigger role to be the chief transformation architects.” —Lara Balazs, CMO, **Adobe**
- » “As a CMO, my job is not to build what we can get from the outside world. My job is not to build an ad agency or run an ad agency. My goal is to modernize marketing and use data and technology in our storytelling and brand building.” —Drew Panayiotou, CMO, **Keurig Dr Pepper**
- » “Marketing services agencies will change. They will no longer be agents. Rather, they will become vendors that execute programs; merchants that resell software and media; affiliates that contribute capabilities to larger, matrixed organizations; and partners that deliver client-centric marketing services.” —Steve Boehler, Founder, **Mercer Island Group**
- » “Agencies will no longer pitch differentiation through AI capabilities or however many hundreds of millions of dollars invested into their development. They’ll simply operate with AI integrated into their OS.” —Greg Paull, President Global Growth, **MediaSense**
- » “We wanted to bring brand strategy, social media and analytics inside GM, while keeping agencies focused on breakthrough creative and what they do best.” —Norm de Greve, Global CMO, **General Motors**
- » “AI is trained on the past. Humans are the owners of the future.” —Margaret McGovern, Executive Creative Director, **Boathouse Group**
- » “Strategy remains human. Strategy remains essential. And in the age of AI, that is what will determine who thrives.” —Javier Rodriguez Horta, Marketing Strategy Senior Consultant, **Overline**
- » “At Adobe, we see generative AI as a creative amplifier, not a replacement for human ingenuity.” —Lara Balazs, CMO and EVP Global Marketing, **Adobe**
- » “Agencies will need to stop selling outputs and start selling outcomes.” —Ramzi Chaabane, Director, Marketing Indirect Procurement, Advocacy, Influencer & PR Agency Partnerships, **L’Oréal**
- » “We really are, to some degree, shifting our best domain experts from directly servicing clients to encoding their knowledge into our software and our agents.” —Stephan Pretorius, CTO, **WPP**
- » “Tech and AI will play such a major role in how all agencies respond to RFPs that it will change what the clients expect from our responses.” —Gretchen Walsh, President, **McKinney**
- » “AI campaigns are only as powerful as the creative minds behind them.” —Nir Refuah, Creative Director, **Fiverr**
- » “In the old model, our agencies were managing thousands of operational details. They were in every meeting and every workflow as we asked them to be, but the structure came at a cost. As they became a bigger part of our operations, they became less creatively led... When agencies stop being buried in our workflows, they keep that outsider’s edge.” —Norm de Greve, Global CMO, **General Motors**
- » “If Google owns the AI infrastructure and the data, where does that leave the agencies’ creative IP? Will AI finally help ignite innovation at ad agencies, or just make them glorified resellers for Big Tech?” —Alex Richards, Regional Vice President of Partnerships, **Quantum Metric**
- » “The professional services firm of the future is an AI-powered platform that draws upon a large army of specialist cloud-based platforms and technologies managed by a much smaller army of human orchestrators.” —Tim Williams, Founding Partner, **Ignition Consulting Group**

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



In a dazzling showcase of technology and artistry, The Wizard of Oz returned to the big screen, reborn through advanced AI and cloud innovation using Google Cloud, Veo, Imagen, and Gemini. Every 1939 frame was transformed into ultra-high-definition imagery for the premiere at the Las Vegas Sphere, symbolizing how AI can restore, reimagine, and reinvent storytelling. Across the marketing and media landscape, the same transformation is underway. Agencies and brands are using AI to redefine value, precision, and creativity—where procurement evolves from cost control to strategic architecture, and benchmarking becomes a lever for transparency and ROI. Retail media now spans both physical and digital worlds, demanding new KPI frameworks and data ownership. And the art of creative feedback—rooted in inspiration, clarity, and trust—remains more vital than ever as automation accelerates. As industry recognition highlights innovation from McCann to VML to Zulu Alpha Kilo, one message resonates: Technology alone doesn't create magic—vision does. AI provides the canvas; creativity paints the masterpiece. The future of marketing is not machine-made, it's human-amplified.

• Per Cella, the **art of effective creative feedback** consists of:

- 1) Straight talk
- 2) Do: Inspire the team by:
 - a) Setting the brief as the foundation
 - b) Defining the problem clearly
 - c) Encouraging exploration
- 3) Don't: Fall into verbal traps by:
 - a) Not prescribing solutions
 - b) Criticizing without clarifying
 - c) Micromanaging

• Per ECI, **10 retail media investment strategies in 2026 and beyond:**

- 1) Increased investment in retail media means careful allocation decision-making,
- 2) Retail media is evolving into a full-funnel channel, so investment needs to reflect objectives,
- 3) Advertisers must consider which formats will drive attention while minimizing waste,
- 4) In-store digital inventory presents the opportunity to invest in online and physical environments,
- 5) The integration of onsite and offsite strategies is essential and highlights the need for data ownership,
- 6) Amazon's US dominance contrasts with Europe's more fragmented landscape,
- 7) Advertisers should ensure they apply normal quality standards,
- 8) A KPI framework combining media and business KPIs is crucial,
- 9) Measurement standards are still catching up,
- 10) Transparency and trust must be prioritized.

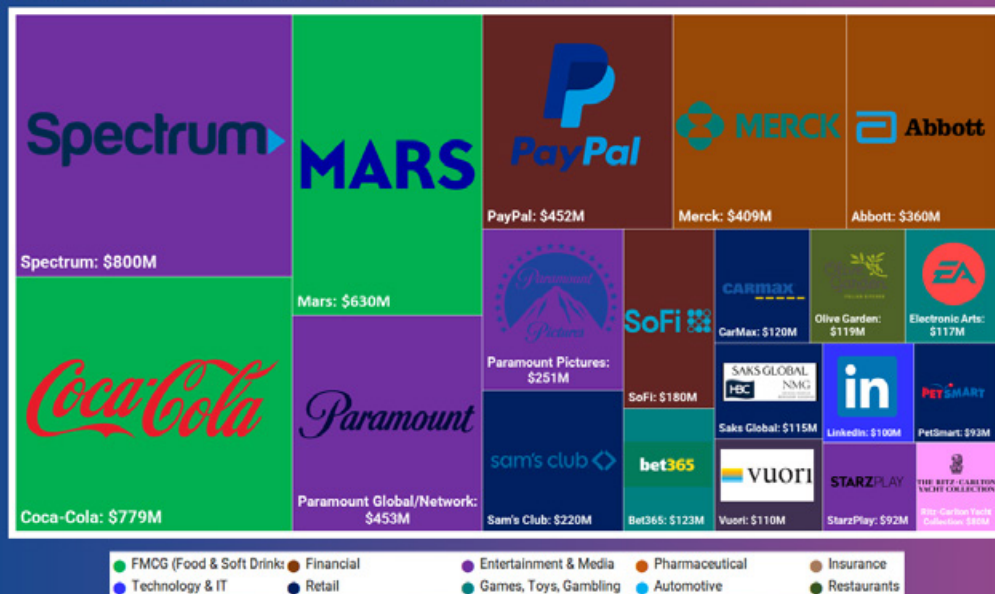
• Per Cortex Media, **four key reasons why benchmarking matters in media auditing**, even for biddable and programmatic:

- 1) Helps set savings goals and KPIs (benchmarking highlights inefficiencies, enabling advertisers to course correct)
- 2) Optimizes media strategies (benchmarking isn't just about cost—it informs smarter allocation)
- 3) Enhances transparency and accountability
- 4) Increases ROI (sometimes higher-priced strategies don't deliver higher value).

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

TOP MEDIA PITCHES & MOVES CONCLUDED IN H1 2025

(BUDGET >\$80M ONLY – OUT OF TOTAL SPEND REVIEWED OF \$8B)



Source: COMvergence

- Per Ramzi Chaabane, director, marketing indirect procurement, advocacy, influencer and PR agency partnerships at L'Oréal, **key procurement responsibilities** moved from “cost control to strategic architecture,” including:
 - 1) Negotiate for ecosystem expertise (ensuring agency partners are truly equipped to design for the new, closed-loop AI environments)
 - 2) Redefine value (moving beyond the simple cost-per-click model to frameworks that can genuinely measure platform-native performance)
 - 3) Anticipate hidden costs (such as the constant content iteration within AI systems; licensing fees; and even the compliance risks that arise when platforms mediate the consumer relationship)
 - 4) Updating MSA and new contracts (accounting for the increasingly blurred lines between what the agency produces, what the platform automates, and how brand performance is ultimately achieved)

Noteworthy quotes:

- » “We are witness to a new form of storytelling.” —Shelly Palmer, CEO, **The Palmer Group**
- » “We live by a simple motto: Be hard on the work, kind to the people. Friction is part of that process.” —Dominic Goldman, Founder and Chief Creative Officer, **You're The Goods**
- » “Generative AI is best used to enhance a creative idea, bringing a story to life in a way that feels fresh without pulling the spotlight away from the brand itself.” —Rebecca Swift, Global Head of Creative, **Getty Images**
- » “The demands or expectations of clients are for more integration, more converged thinking, [and] more speed.” —Justin Thomas-Copeland, CEO, **4As**
- » “If agencies are moving upstream, procurement absolutely must move alongside them, fostering creativity rather than commoditizing it.” —Ramzi Chaabane, Director, Marketing Indirect Procurement, Advocacy, Influencer & PR Agency Partnerships, **L'Oréal**
- » “AI creates space for higher-value work—helping teams ideate, generate, and execute more quickly, while staying grounded in the insight and purpose that only humans can bring.” —Lara Balazs, CMO and EVP Global Marketing, **Adobe**
- » “AI doesn't have imagination. You do.” —Sir John Hegarty, Co-Founder and Creative Director, **The Business of Creativity**
- » “AI will do this work faster, cheaper and better than humans. Once the busywork is out of the picture, we're free to focus on what we actually love doing—crafting: Big ideas, bold storytelling and meaningful brand building.” —Margaret McGovern, Executive Creative Director, **Boathouse Group**

Awards:

- Per Adweek, **Agency of the Year 2025**

Shortlist includes:

- Agency Network—Acceleration Community of Companies (ACC), FCB, GUT, McCann, MSQ Partners
- Global—JOAN Creative, McCann, VML, Wieden+Kennedy
- Multicultural—alma, DDB Latina Puerto Rico, IW Group, the community
- Independent—Known, Giant Spoon, Mischief @ No Fixed Address, Rethink, Special US
- Innovation—Code and Theory, Digitas, FIG, Silverside, Zulu Alpha Kilo
- Social Media/Influencer—ATTN:, Billion Dollar Boy, Loop, VaynerMedia, Whalar Group

Other categories include: International, Small, Midsize, Breakthrough, and US

- » “In the age of AI, the loudest voices will not win. The clearest thinking will.” —Javier Rodriguez Horta, Marketing Strategy Senior Consultant, **Overline**
- » “As the world redefines how ideas are brought to life, the brands that will win will be those that combine relevance, creativity, and scale—without compromise.” —Lara Balazs, CMO and EVP Global Marketing, **Adobe**
- » “Conflict is usually just fear in disguise. When you meet it head-on, it does not break the relationship. It builds trust and proves you have your client's back, even when they are uncomfortable.” —Lauren Shakil, Director of Accounts, **Bald Agency**
- » “The problem isn't AI—it's how blindly it's used. When teams treat generative AI as a shortcut rather than a tool, the result is slop.” —Christoph Berg, CEO and Co-Founder, **MINT Square**
- » “AI doesn't hit it out of the park every time. It doesn't need to. Its value lies in volume, rhythm and the occasional brilliant accident.” —Kate Wolff, Founder and CEO, **Lupine Creative**
- » “Providing positive feedback to creative teams shouldn't be for the sake of doing so. It's about building better partnerships. It's a shift from critic to collaborator.” —Pam Orlando Zanni, SVP Strategic Accounts, **Cella**
- » “Scopes of work are designed to achieve low costs in media (via digital/social and programmatic) and low costs for creative outputs (adaptations involving ad banners, email marketing, search, online videos, etc.) rather than higher brand growth rates.” —Michael Farmer, Chairman and CEO, **Farmer & Company**

FINANCIALS: Driving efficient use of resources



Global advertising is entering a new era of accelerated growth and transformation. WARC projects ad spending to surge 7.4% in 2025, reaching \$1.17 trillion, powered by digital-first platforms and social media. Alphabet, Amazon, and Meta are expected to command over half of all global spend—cementing their dominance outside China. Despite growth, inflationary pressures persist: The World Federation of Advertisers reports global media costs are rising by 4.3% in 2025, an inflation rate that is expected to hold steady in 2026. Alphabet's record \$102.3 billion in quarterly revenue underscores the AI revolution reshaping the industry, with 70% of Google Cloud clients now using its AI tools. Meta's ad business grew 26%, driven by 3 billion Instagram users and major AI infrastructure investments exceeding \$70 billion. Agency models are also evolving. The 4As revealed a shift away from hourly and cost-plus compensation toward deliverables- and outcome-based models, echoed by JFE International Consultants's call to "anchor pricing to impact." M&A activity surged, led by Publicis's \$6.3 billion new-business haul and landmark deals, including Horizon Media Holdings and Havas forming Horizon Global, featuring their united platform, BluConverged; R/GA's AI-native Addition acquisition; and the merger of Empower Media and Ocean Media.

- Per WARC, **global ad spending** is expected to increase 7.4% to reach \$1.17 trillion in 2025, higher than originally forecast, fueled by digital-first ad platforms and social media spending. Alphabet, Amazon, and Meta continue to dominate. The trio is forecast to capture more than half (55.8%) of global ad spend expenditures, excluding China.
- Per the WFA, **global media costs** have risen half a point to an annual inflation rate of 4.3% for the ad industry in 2025. 2026 media cost inflation is expected to be 4.2%. In the US, media costs for advertisers rose half a point, to a 3.8% rate of inflation in 2025, and are forecast to rise to a 4% rate in 2026.
- **Alphabet** (parent of Google) revenue exceeded \$100B in Q3 for the first time, a 16% increase YOY, to reach \$102.3 billion. Google Cloud revenues were up 34% (\$15.2B) with 70% of Google Cloud customers using Google AI products. Google reported 650 million monthly active users of its Gemini app and 75 million daily active users of AI Mode. Alphabet raised its initial \$85B forecast for projected capital expenditures for 2025 in the range of \$91B to \$93B.
- Social media giant **Meta's** ad revenue in Q3 reached \$50.1B (97% of Meta's total revenue), up 26% YOY. A few highlights: 14% increase in ad impressions delivered across Meta's apps combined with a 10% increase in average price per ad. Instagram hit a major milestone with 3 billion monthly active users. The company spent \$19.4 billion on capital expenditure, much of it related to developing its AI infrastructure (building new data centers, servers, and computing hardware for training large-scale AI systems). Full-year 2025 capital expenditures are forecast to be between \$70B and \$72B.
- The 4As released its "**Agency Compensation and the Transparency Trap: Where to Draw the Line**" research paper. Per the study, 40% of consultants never request disclosure of agency overhead/profit data; 24% ask all the time; 12% rarely do. Fixed fee is the most popular model (25% of total rankings), followed by hybrid models (21%), cost-plus (17%), and hourly rate (15%). Much less common are performance-based fees and bonuses (9%), outcome-based fees (3%), pre-negotiated price lists (3%), and subscriptions (1%). 52% favor moving away from hourly/cost-plus models (16% strongly, 36% somewhat). 56% agree that deliverables-based compensation better serves all parties (12% strongly, 44% agree).
- Per COMvergence, \$17.6 billion of **pitch work** was at play in H1, with 1,840 media account reviews in 49 countries (61% local, 39% global). Publicis Media led by a wide margin in global new business wins and retentions (\$6.34 billion, including The Coca-Cola Co.'s \$835 million North America business and new business from Barilla, Dropbox, Goodyear, LinkedIn, Mars, PayPal, and Santander) among media agencies for the first half of 2025. IPG's Mediabrands ranked second with \$1.5 billion. Omnicom Media rounded out the top 3, with \$1.16 billion. Dentsu and Havas ranked fourth and fifth, respectively, followed by WPP, showing a net decline of \$2.27 billion. For the network level, IPG's Initiative was top ranked globally (\$1.4 billion) with wins including Paramount and Anthropic. Independent agencies won \$2.98 billion of the total billings reviewed, including two big wins for Horizon Media: Spectrum (\$800 million) and Peloton (\$225 million).
- JFE International Consultants issued its "**Beyond FTE: A Practical Roadmap for Adopting Outcome-Based Compensation in the Age of AI**" white paper, providing key guiding principles:
 - 1) Anchor pricing to impact
 - 2) Bundle capabilities across functions (combining media, creative, and production)
 - 3) Treat AI as embedded infrastructure (AI should be woven into an agency's offering and pricing structure)
 - 4) Get ahead of the RFP process. Key challenges: Client CFOs resist variable payments; intermediaries default to FTE in pitches; typical inertia; and a lack of templates

Mergers and acquisitions (M&A) activity:

- **Holding company M&A** was limited in Q3 2025. WPP acquired no firms during the time period, focusing on its restructuring and declining performance. Publicis Health, a subsidiary of Publicis Groupe, acquired p-value Group, a full-service medical communications company that works with life science clients. Omnicom Group is expected to complete its acquisition of Interpublic Group in Q4 after securing regulatory approvals in various markets. It will be the world's largest advertising network by revenue.

- Horizon Media Holdings and Havas partnered in a joint venture, New York–based **Horizon Global**, to collaborate on media reviews ahead of challenges arising from Omnicom’s pending acquisition of Interpublic Group. Both firms, privately held New York–based Horizon and publicly traded Paris-based Havas, operate independently, with profits split evenly between the two. Both companies are handling \$20B+ in combined 2024 billings. Horizon Global will unite Horizon’s Blu platform and Havas’s Converged.AI system to form BluConverged.
- Digital media company **Literally Media** acquired the entertainment publisher Den of Geek in a move to broaden its portfolio beyond comedy and internet culture and deepen its coverage of movies, TV, gaming, and comics.
- Global marketing agency **Incubeta** acquired RocketSource, an AI-driven consultancy, in a move to strengthen Incubeta’s human-centered AI offerings. Clients will be able to leverage RocketSource proprietary frameworks that deliver marketing at scale, behavioral science knowledge, and enterprise-grade data analysis to enable precise audience identification and metrics.
- Independent company R/**GA** acquired AI-native system design and development studio Addition, in a move to offer innovative AI solutions as well as cutting-edge AI-enabled processes, blueprints, and services for many of the world’s leading brands. Clients include Google, NBCU, Unilever, and Amazon.
- **Connelly Partners** acquired Boston-based agency McCarthy Mambro Bertino (MMB), responsible for Sam Adams, Newell Rubbermaid, Toyota, and Subway campaigns, with offices in Dublin and Vancouver. The MMB team will integrate across the Connelly network, much like previous acquisitions ZOO Digital and VRX Studios.
- Empower Media merged with Ocean Media, based in Huntington Beach, California, to form an independent agency group with \$1.5 billion in media billings called **Empower Ocean Media Group**. The combined entity, which will centralize technology, media negotiations, and procurement activities, and focus on advanced data insights, proprietary platforms, and performance-driven media strategies, is now the second-largest independent media agency group in the US by billings, after Horizon Media.



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

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

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Click here to read Bruno Gralpois’s thoughts around what major shifts are happening right now that are transforming what partnership truly means.

- Canadian private equity group **Novacap** acquired Integral Ad Science (IAS), an adtech firm specializing in ad verification and measurement, for \$1.9 billion. IAS operates cloud- and AI-based technology that provides independent verification and measurement of digital ad campaigns across channels and devices.
- **M+C Saatchi Group** acquired Women's Sports Group (WSG), an advisory and media rights consultancy, in a move to strengthen the firm's expertise in rights acquisition, brand storytelling, partnerships, and fan growth. WSG will maintain its brand but operate as part of M+C Saatchi Sport & Entertainment.
- Colorado private equity firm **Mountaingate Capital** bought a majority interest in Chicago-based B2B marketing agency Walker Sands from Stone-Goff Partners in a move to strengthen the firm's offering in data, analytics, measurement, and technology.
- Strategic experiential agency **George P. Johnson** acquired Cresci's, a Miami-based design and creative agency, which services B2B technology brands with clients such as IBM, Turbo Tax, Google, Cisco, and Salesforce.
- **HW Fisher**, part of the Sumer Group, acquired Media Marketing Compliance (MMC), a London-based independent global specialist providing financial transparency to advertisers. The move aims to strengthen HW Fisher's forensic and audit capabilities by integrating its expertise in licensing and investigations with MMC's specialist knowledge in auditing media and marketing agencies across the globe.
- Design and technology agency **Huge** acquired creative studio Both&Yes to expand and strengthen the firm's capability in digital creative. Interpublic sold Huge to AEA Investors the year prior, which subsequently merged Huge with another agency, Hero Digital.
- Miami-based marketing agency **Mod Op** acquired customer engagement specialist Ascend Marketing to expand its B2B marketing capabilities, such as leveraging CRM and marketing automation platforms like HubSpot and Adobe Marketo Engage. Mod Op clients include Nestlé, Duracell, ExxonMobil, and DoubleVerify.

- **Stagwell** acquired a 35% stake in Real Clear Holdings, publisher of the RCP Poll Averages, news publication RealClearPolitics, and 12 other news and analysis sites in a move to leverage RealClear's audience, op-ed aggregation, and polling capabilities for its clients.

Holding company financial performance:

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

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- **Publicis Groupe** reported revenue of €3.529 billion in Q3, 5.7% organic net revenue growth fueled by scope expansion with existing clients, sustained strong new business, and higher demand for AI-powered marketing and data solutions. The group is performing strongly and gaining share (from WPP among others). Connected media (data, media, CRM, social, commerce) accounted for 60% of revenue, citing high single-digit growth driven by Publicis Media's scale, powered by Epsilon data. The US was the strongest performer, delivering organic revenue growth of 7.1%. Europe grew by 2.8%, Asia Pacific by 6.5%. The firm states that 73% of its revenue is now AI-powered. 50% of the reviews Publicis Groupe won in the past six months were secured without a pitch. The operating margin was slightly above 18%, including investments in M&A and talent. The firm upgraded FY25 organic growth guidance to be between 5% and 5.5%, thanks to sustained demand for AI capabilities.

Noteworthy quotes:

- » "We delivered our first-ever \$100 billion quarter. Five years ago, our quarterly revenue was \$50 billion. Our revenue number has doubled since then, and we are firmly in the generative AI era." —Sundar Pichai, CEO, **Google**
- » "The agency, not the client, is responsible for managing their costs to protect their bottom line." —Deb Giampoli, Co-Founder and Partner, **Stone Soup Consultants**
- » "Good luck in convincing Procurement to add 'AI system fees' to agency invoices for services. It simply won't happen. Instead, there is a potential gold mine for fees and services if agency/holding company C-suite executives pivot to become more strategic and move in new directions for the benefit of their clients." —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » "Anything in a true partnership that works to the detriment of one partner ultimately works to the detriment of both partners. The optimal client-agency relationship is one that is mutually connected, collaborative and constructive." —Greg Paull, President, Global Growth, **MediaSense**
- » "AI can take at least 25% of creative agency fees and more than 40% of media agency fees. There is no way that agencies can 'optimize' their way out of this situation. New strategies are required." —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » "Clients and CMOs should know that we are focused on gearing agencies up not just to deliver value, but to reimagine that value. Because we know that business is changing. We know the rules are changing, the expectations are changing." —Justin Thomas-Copeland, CEO, **4As**

- **Omnicom Group** reported revenue of \$4 billion in Q3, a 4% increase YOY, with organic growth of 2.6%. Organic growth by region was 4.6% for the US, 27.3% for Latin America, 3.7% for the UK, and 5.9% for the Middle East & Africa, partially offset by declines of 0.2% for Other North America, 3.7% for Asia Pacific, and 3.1% for Euro Markets & Other Europe. Organic growth by discipline was 9.1% for Media & Advertising, 2% for Execution & Support, and 0.8% for Precision Marketing, partially offset by declines of 1.9% for healthcare, 7.5% for Public Relations, 17.7% for Experiential, and 16.9% for Branding & Retail Commerce. Net income was \$341.3 million and operating income was \$530.1 million with a 16.1% margin. The firm expects to close the Interpublic acquisition in November.
- **Interpublic Group (IPG)** did not report its Q3 financial performance on time for the publication of this Industry Update. Limited information is expected, given the pending transaction with Omnicom. The firm does not intend to host a conference call to discuss third-quarter results or to update previously issued guidance.

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

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

- » "Agencies can't monetize AI while clinging to outdated pricing models. It's time to shift from labor and input-based (and even output-based) models to ones focused on outcomes, solutions, and value creation." —J. Francisco Escobar, President and Founder, **JFE International Consultants**
- » "Over the last year, we've introduced something called dynamic, share ownership, where we are co-creating, co-owning and co-accountable for what we do in terms of activities." —Céline Baudin, Head of Content, Integrated Communications and AI-Enhanced Marketing, **Bayer**
- » "We believe that consolidation of more of the same for the sake of efficiencies is basically yesterday's logic." —Arthur Sadoun, Chairman and CEO, **Publicis Groupe**

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.

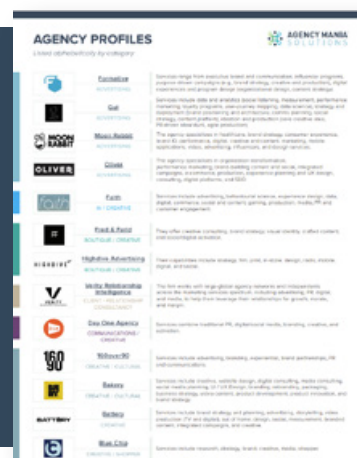
- Discount supermarket giant **Aldi** selected Publicis Groupe as its global media AOR following a review. The agency created a dedicated unit to service the account called Aldi One. The holding company previously handled work in several markets (US and UK namely) through media agency Starcom.
- Financial giant **American Express** selected Omnicom Group's Goodby Silverstein & Partners as its creative AOR in the US and TwentyFirstCenturyBrand as its global brand strategy agency following a review, replacing incumbents Dentsu Creative and WPP's VML. Dentsu Creative will continue to support international advertising and other creative projects. The agencies will collaborate with IPG's UM, the brand's global media AOR.
- Pharma giant **Bayer** selected IPG to handle global media, creative, and production services for its consumer health division (with brands such as Bayer Aspirin, Bepanthen, Claritin, and Canesten) following a review, replacing incumbents Omnicom and WPP.
- UK TV network and broadcaster **BBC** renewed its media agency contract with Havas for six years following a review. Havas has been the media planning and buying AOR since 2015.
- Benton's Smoky Mountain Country Hams** selected Richmond, Virginia-based Tilt advertising and full-service Production as its creative AOR. The agency will handle creative advertising, social storytelling, experiential activations, and production.
- Medical-grade hydration drink **Biolyte** selected Burrell Communications Group-owned Fitzco as its first integrated AOR. The agency will handle both creative and media.
- Nestlé-owned non-dairy creamer **Coffee mate** kicked off a review of its creative business after parting ways with indie shop Wieden+Kennedy, which remains on the parent company agency roster.
- Wellness brand **Clean Simple Eats** selected January Digital as its media AOR following a review. The agency will handle media strategy and planning across Meta and Google.
- Delta Air Lines** kicked off a review of its global media business. Seven-year incumbent Omnicom Media Group agency PHD is expected to defend. The agency won the US business in 2016 and later added more regions.
- Edgewell Personal Care** selected Publicis Groupe's BBH (Bartle Bogle Hegarty) USA as its creative AOR in the US following a review and expanding on prior work done with the agency. BBH will handle all creative duties for the brand's portfolio, including Schick, Playtex, Hawaiian Tropic, Banana Boat, and Wet Ones.
- Mozilla web browser **Firefox** selected Whalar as its global creator AOR in a move to win over Gen Z in the US and Europe. The social and creator marketing shop within Whalar Group expanded its original US-based, project-based scope.
- Online food ordering company **Grubhub** kicked off a review of its creative business. Incumbent agency Walrus is expected to defend. The brand hired Walrus in July 2025 after handling most creative in-house. The agency will partner with IPG's UM, the firm's media AOR since 2022.
- Supermarket chain **Grocery Outlet** selected Oakland, California-based media agency H/L as its media planning and buying AOR following a review. The agency will handle all media duties to drive awareness, store visits, and sales.
- Financial services provider **H&R Block** expanded its relationship with VaynerMedia, adding media duties to the agency's social creative remit and replacing incumbent Gale. The agency is expected to partner with the brand's creative AOR, WPP's Ogilvy.
- Deckers Brands-owned and performance-running footwear company **Hoka** selected Rygr, a Colorado-based integrated marketing agency, as its brand communications AOR. The agency is also responsible for earned-media strategy for Hoka.
- UK-based **Haleon** selected Publicis Groupe (for its over-the-counter drugs such as Voltaren and Advil) and WPP (for oral health and wellness products such as Sensodyne and Polident) as its global creative AORs following a review, splitting the account between the two agency giants and replacing incumbent IPG. The consolidation is meant to enable a "more simple, focused way of working."
- Family-themed attractions operator **Herschend Family Entertainment** selected Crossmedia as its media AOR following a review and replacing incumbent Allied Global Marketing. The agency will handle all media duties for the brand portfolio, including Dollywood Parks & Resorts, Silver Dollar City Parks & Resorts, Wild Adventures Theme Park & Safari Campground, Kennywood, and Adventure Aquarium.
- Supermarket chain **Hy-Vee** selected Dentsu's iProspect unit as its media planning and buying AOR. The agency will handle all "enterprise media" for Hy-Vee and its affiliates. iProspect is expected to leverage Dentsu's Mercury identity data capabilities as part of the agency's scope.

- Grocery delivery company **Instacart** kicked off a review of its organic social business. The review comes as the company continues to focus on strengthening its brand marketing, as part of a broader strategy for Instacart to evolve its brand marketing beyond its core grocery delivery service.
- **Ingredion**, a global provider of ingredients to the food and beverage industries, selected Milwaukee-based, full-service Bader Rutter as its first global AOR following a review, consolidating work from multiple agencies. Bader Rutter will handle integrated brand strategy, creative, and media planning and buying.
- Commercial realtor **JLL** selected B2B agency Stein (part of MSQ Partners) as its global strategic and creative AOR following a review. The agency will handle strategy, creative, and go-to-market activities with a focus on global brand awareness and customer experience.
- Consumer healthcare giant **Kenvue** kicked off a review of its global integrated (media and creative) business. Incumbents Publicis Media and UM on the media side and FCB and BBDO on the creative side are expected to defend the estimated \$1.35 billion account. The brand is looking for reduced complexity, improved execution, and accelerated growth with a focus on data-driven, digitally enabled capabilities for its diverse brand portfolio (Tylenol, Band-Aid, Listerine, Neutrogena, Aveeno, etc.).
- Uniti Group–owned internet provider **Kinetic** selected McCann Detroit as its advertising and creative AOR. The agency will handle all creative duties, including brand transformation, social, and digital.
- Microsoft-owned business social platform **LinkedIn** selected IPG's McCann as its global creative AOR following a review. The agency will collaborate with the newly appointed AOR, Publicis Media, and its global creative strategic AOR for LinkedIn Ads, R/GA.
- The nation's leading travel stop network, **Love's Travel Stops**, kicked off a review of its creative and media business. The brand historically relied on small, project-based agencies and is now consolidating work.
- US defense contractor **Lockheed Martin** selected Stagwell's Gale as its creative and media AOR, following a review and replacing incumbents IPG's McCann and Mediahub.
- Financial services giant **Mastercard** selected WPP Media as its global media AOR following a review, replacing incumbent Dentsu's Carat. The agency will handle media strategy, planning, and buying as well as paid media, social engagement, and business enablement for the brand in more than 70 international markets. WPP Media will partner with IPG's McCann, the brand creative AOR, and newly appointed WPP creative agency Ogilvy as its global community management AOR tasked to engage with online communities in key markets.
- Container logistics and supply chain services giant **Maersk** selected WPP Media as its media AOR following a review, replacing incumbent Havas Media. The agency will handle all media planning and buying in 130 countries from a hub in Copenhagen.
- Men's grooming company **Manscaped** kicked off a review of its creative account. The assignment will include a spot that will run during Super Bowl LX.
- Swedish healthy snacks brand **Nick's** selected Cincinnati-based independent full-service agency Curiosity as its first creative AOR following a review. The agency will support all creative duties for the no-added-sugar ice cream, protein bars and candy brand portfolio, and include social, shopper, and cultural activations.
- The **National Pork Board** selected Dallas-based cross-cultural ad agency LERMA/ as its Hispanic AOR following a review, replacing incumbent Republica Havas. The agency will handle Hispanic creative, strategy, social, and paid media and partner with the brand's consumer marketing AOR, BarkleyOKRP.
- Jørgensen cheese parent **Norseland** selected One Horizon (the full-service creative agency that Horizon Media launched last year) as its integrated AOR following a review. There was no incumbent. The agency will handle all duties, including online video, paid social, search, shopper marketing, and influencer marketing.
- Lakeland, Florida–based supermarket chain **Publix** selected New York-based Known as its media AOR following a review, replacing incumbent 22Squared, which handled creative and media. The agency will handle all media duties for more than 1,400 stores. The agency is expected to collaborate tightly with the brand's newly appointed creative AOR, Fig.
- Georgia-based kitchen, bath, and lighting company **PDI** selected Ammunition as its integrated AOR following a review. The agency will handle strategy, creative, media, e-commerce, social, influencer marketing, production, SEO, and analytics.
- Ascent Hospitality Management–owned casual dining chain **Perkins American Food Co.** selected Acadia as its new media and social AOR following a review, replacing incumbent Buntin Group and Dunn & Co. The agency will handle paid search, paid social, integrated media, TikTok and Instagram management, influencer management, studio creative, and full-funnel analytics support.
- Pizza chain giant **Papa John's** kicked off a review of its creative account as the brand parts ways with two-year incumbent The Martin Agency.
- Yum Brands–owned **Pizza Hut** consolidated its US creative duties with WPP's VML as its creative AOR, replacing one-year incumbent IPG's Deutsch. The agency, which handled customer promotions, loyalty, and CRM efforts in the past for the brand, now adds TV creative and social.
- German automaker **Porsche** selected Omnicom Group's Adam&eveDDB as its creative AOR in the US following a review, replacing 17-year incumbent Chicago-based Cramer-Krasselt.

- Convenience store and gasoline retailer **QuikTrip** selected Chicago-based agency Laughlin Constable as its new integrated AOR following a review, replacing incumbent WPP's VML. The agency will handle creative and media duties, including brand and promotional campaign strategies, data-driven media planning and buying, and omni-channel creative and production.
- Software company **Qualtrics** selected San Francisco-based ROI-DNA as its full-service B2B digital marketing AOR following a review. The culture-first agency is part of Hotwire Global and The Eero Group. The agency will handle paid media strategy and execution across global and local markets, including paid search, social, and programmatic channels.
- **Resorts World Las Vegas** selected Santa Monica-based, full-service independent agency RPA as its new integrated AOR. The agency will handle media planning and buying, creative, and messaging strategy for the casino brand and its properties: Las Vegas Hilton at Resorts World, Conrad Las Vegas at Resorts World, and LXR, Hilton's network of independent luxury properties, which operates as Crockfords Las Vegas.
- Furniture company **Raymour & Flanigan** kicked off a review of its media business. The incumbent, Dentsu X, is expected to defend. The winning agency will handle media planning and buying for the company's 140 stores across the Northeast US and in-store and online operations.
- Fast-casual restaurant chain **Shake Shack** selected Portland, Oregon-based independent shop Opinionated as its new creative AOR following a review, replacing incumbent Austin-based Preacher. The incumbent agency was invited to join the pitch but declined. Opinionated will partner with other AORs, including PMG for media, Confidant for consumer PR, and ICR on business and earnings communications.
- Carpet, upholstery, and air-duct cleaning service firm **Stanley Steemer** selected Havas Chicago as its new creative AOR following a review. The agency will support all creative duties for the 275 franchises in 49 states.
- **Super Star Car Wash** selected Nashville-based The Mayor as its integrated AOR. The agency will handle brand building, creative, digital, social, CRM, and out-of-home campaigns.
- Beverage company **Saint James Iced Tea** selected New York-based January Digital as its digital media AOR following a review. The agency previously led the brand's paid media strategy. The agency will handle all digital media duties, including full-funnel media planning, execution, and optimization.
- **T-Mobile** shifted its agency model, moving most of its lead US creative agency work from Dentsu to in-house for creative strategy, production, and execution with the goal to move faster, operate more efficiently, and stay closely aligned with the needs of its customers. No other change is expected to the roster, which includes Monks as its social AOR, IPG Mediabrand as its media AOR, and also BarkleyOKRP for its Metro by T-Mobile business and Panay Films, among others.
- Real-estate investment and Baltimore-based firm **Tide Realty Capital** selected Warschawski as its integrated AOR. The agency, a national boutique marketing communications firm based in Baltimore, will handle integrated marketing campaigns, as well as branding, advertising, marketing, marketing, digital, public relations, social media, web development, creative design, and crisis communications services.
- Mosquito protection solutions and Boston-based firm **Thermacell** selected Gut Buenos Aires as its global creative AOR following a review. The agency will handle all creative duties, including its upcoming global campaign in the US Canada, Europe, Asia, Australia, and Latin America.
- Barcel USA-owned (as part of Grupo Bimbo's snack division) chip brand **Takis** selected WPP's VML as its global creative AOR following a review. The agency will handle all creative duties.
- Lawn care company **TruGreen** selected WPP Media as its media AOR following a review, replacing incumbent Tinuiti. The agency will handle all media planning and buying duties while leveraging Open Intelligence, WPP's proprietary data solution. The brand is also expanding its relationship with sibling agency VML as part of the move.
- Discount retail company **TJX** selected Publicis as its US media AOR following a review, replacing eight-year incumbent WPP's Mindshare. The agency will handle all media planning and buying duties for brands TJ Maxx, Marshall's, and HomeGoods.
- **Whataburger** kicked off a review of its creative business. The 22-year incumbent, Austin-based independent agency McGarrah Jessee, is expected to defend. The agency will collaborate with the brand's media AOR, Empower.
- Private markets investing platform **Yieldstreet** selected IPG's Mediabrand as its media buying AOR and IPG's MullenLowe US as its creative AOR. The media agency will handle media strategy, planning, and activation for channels such as programmatic and paid social. The creative agency will handle TV, digital, and social duties.

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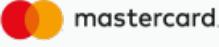
Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Aldi	unk	Media AOR	Global	Publicis Groupe	Y
	American Express	Dentsu Creative	Creative AOR	US	Omnicom's Goody Silverstein & Partners	Y
		WPP's VML	Brand Strategy	Global	TwentyFirst Century	Y
	Bayer (consumer health)	Omnicom and WPP	Media, Creative, Production	Global	IPG	Y
	BBC	Havas	Media	Global	Havas (retains duties)	Y
	Benton's Smoky Mountain Country Hams	none	Creative AOR	US	Tilt	Y
	Biolyte	none	Integrated AOR (creative and media)	US	Burrell Communications Group's Fitzco	Y
	Clean Simple Eats	unk	Media AOR	North America	January Digital	Y
	Coffee mate	Wieden+Kennedy	Creative	unk		IP
	Delta Air Lines	Omnicom Media Group's PHD (expected to defend)	Media	Global		IP
	Edgewell Personal Care	Bartle Bogle Hegarty	Creative AOR	US	Bartle Bogle Hegarty	Y
	Firefox	none	Social and Creator AOR	Global	Whalar	unk
	Grocery Outlet	unk	Media Planning and Buying AOR	US	H/L	Y
	Grubhub	Walrus (expected to defend)	Creative	US		IP
	H&R Block	Gale	Media	unk	VaynerMedia	N
	Haleon (oral health and wellness)	IPG	Creative AOR	Global	WPP	Y
	Haleon (over-the-counter)	IPG	Creative AOR	Global	Publicis Groupe	Y

Agency roster summary:

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COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Herschend Family Entertainment	Allied Global Marketing	Media AOR	US	CrossMedia	Y
	Hoka	unk	Brand Communications AOR	unk	Rygr	unk
	Hy-Vee	unk	Media Buying and Planning AOR	US	Dentsu's iProspect	unk
	Ingredion	none	AOR	Global	Bader Rutter	Y
	Instacart	unk	Organic Social	North America		IP
	JLL	unk	Strategic and Creative AOR	Global	Stein	Y
	Kenvue	Publicis Media, UM, FCB, BBDO (expected to defend)	Integrated Media and Creative	Global		IP
	Kinetic	unk	Advertising and Creative AOR	US	McCann Detroit	unk
	LinkedIn	unk	Creative AOR	Global	IPG's McCann	Y
	Lockheed Martin	IPG's McCann and Mediahub	Creative and Media AOR	unk	Gale	Y
	Love's Travel Stops	various agencies	Creative and Media	US		IP
	Maersk	Havas Media	Media AOR	unk	WPP Media	Y
	Manscaped	unk	Creative	US		IP
	Mastercard	Dentsu's Carat	Media AOR	Global	WPP Media	Y
	National Pork Board	Repulica Havas	Hispanic AOR	US	LERMA/	Y
	Nick's	none	Creative AOR	US	Curiosity	Y
	Norseland	none	Integrated AOR	unk	One Horizon	Y
	Papa John's	The Martin Agency	Creative	unk		IP
	PDI	unk	Integrated AOR	US	Ammunition	Y
	Perkins American Food Co.	Buntin Group and Dunn & Co	Media and Social AOR	US	Acadia	Y
	Porsche	Cramer-Krasselt	Creative AOR	US	Adam&eveDDB	Y

Agency roster summary:

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COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Publix	22Squared	Media AOR	US	Known	Y
	Qualtrics	unk	B2B Digital Marketing AOR	Global	ROI-DNA	Y
	QuikTrip	WPP's VML	Integrated AOR	US	Laughlin Constable	Y
	Raymour & Flanigan	Dentsu X (expected to defend)	Media	US and Online		IP
	Resorts World Las Vegas	unk	Integrated AOR	US	RPA	unk
	Saint James Iced Tea	unk	Digital Media AOR	US	January Digital	Y
	Shake Shack	Preacher	Creative AOR	US	Opinionated	Y
	Stanley Steamer	none	Creative AOR	US	Havas Chicago	Y
	Super Star Car Wash	unk	Integrated AOR	US	The Mayor	unk
	T-Mobile	Dentsu	Creative	US	In-House	N
	Takis	unk	Creative AOR	Global	WPP's VML	Y
	Thermacell	unk	Creative AOR	Global	Gut Buenos Aires	Y
	Tide Realty Capital	unk	Integrated AOR	US	Warschawski	unk
	TJX	WPP's Mindshare	Media AOR	US	Publicis	Y
	TruGreen	Tinuiti	Media AOR	US	WPP Media	Y
	Whataburger	McGarrah Jessee (expected to defend)	Creative	US		IP
	Yeildstreet	unk	Media Buying AOR	US	IPG's MediaBrands	unk
		unk	Creative AOR	US	IPG's MullenLowe US	unk

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

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