

Industry Update

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

November - December 2025 | Volume 85



In this issue:

TALENT



Securing the right talent and resources

The agency universe isn't just shifting—it's exploding into a new cosmos of possibility. After acquiring Interpublic Group, Omnicom is now the world's largest... [continued on pg. 2](#)

WORK AND PERFORMANCE



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

Influencer marketing has surged into the mainstream, yet the... [continued on pg. 9](#)

FINANCIALS



Driving efficient use of resources

Adobe announced that shoppers in the US spent a record-shattering \$44.2 billion online during the five-day stretch following Thanksgiving. WPP is... [continued on pg. 12](#)

AGENCY



Agency reviews and roster changes

Delta Air Lines kicked off a review of its global media business. The nine-year incumbent, Omnicom's PHD, is expected to defend. The agency won the... [continued on pg. 16](#)

ARTICLE



ARTICLE: Raising the bar in the events space: Spending smarter without compromising experience

Contributed by: Claire Randall Consulting

Events are still one of... [continued on pg. 5](#)

EXECUTIVE SUMMARY: November – December recap

If one song could capture the mood, momentum, chaos, and electric possibility of advertising as we charge into 2026, it would be Kelly Clarkson's "Stronger."

Why? Because everything is being rebuilt—new rules, new models, new ambitions. Because the industry is reshaping itself in real time through restructurings, mergers, acquisitions, and seismic roster shifts. Because a new world order has emerged, with Omnicom rising, WPP stumbling, and legendary brands like DDB being absorbed into new constellations.

Speed has become the new currency. Resilience the defining trait. Budgets tighten even as expectations rise. AI is everywhere, altering craft, workflows, and talent itself. Yet this is not collapse—it's evolution at full throttle. Harder. Better. Faster. And ultimately stronger.

If this transformation feels overwhelming, remember Pantone's 2026 Color of the Year: Cloud Dancer, a soft white chosen as a cultural reset—a reminder to breathe as the industry accelerates into its boldest reinvention yet.

George Tannenbaum from GeorgeCo had a different perspective: "I don't care what Pantone says. The Color of the Year has to be shit show." ☺



Bruno Gralpois
Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources

 The agency universe isn't just shifting—it's exploding into a new cosmos of possibility. After acquiring Interpublic Group, Omnicom is now the world's largest agency, based on total combined revenue of \$26.4B in 2024, ahead of Accenture Song (recently moving to second place) and WPP. Publicis Group holds the fourth position. Even though the share price has dropped 31% since the merger was announced, there is optimism in the marketplace that the combined entity will energize other holding companies and ultimately benefit brand advertisers. On the creative side, Omnicom retired agency giants DDB, MullenLowe, and FCB, which are now folded within its top-tier brands—BBDO, TBWA, and McCann. The mega-merger has been a topic of conversation across the entire industry, and competitors are paying close attention. Rumors of merger discussions between WPP and Havas emerged, which happened to be just that, rumors, and quickly refuted by Havas.

- **Omnicom's** acquisition of IPG led to significant job cuts—more than 23,000—related to restructuring and organizational changes. They took place in multiple waves. IPG cut 3,200 employees in the first nine months of 2025. After several rounds of job cuts, Omnicom recently announced 4,000 more. Omnicom Group comprises about 105,000 employees worldwide (85% professional, 15% back office) after the acquisition.
- **WPP** appointed management consulting firm McKinsey to advise on its much-anticipated strategy review following disappointing financial results and declining market share. McKinsey is expected to support WPP in simplifying and better integrating its offerings, using AI and building enterprise and technology solutions, building a high-performance culture, and improving finances through “operational efficiency and a disciplined approach to capital allocation.
- Per **Forrester**, by 2026 the agency marketplace will operate on three dimensions:
 - 1) Power: Media buying concentrates among fewer, larger players
 - 2) Precision: Media activation shifts from manual to agentic planning and buying
 - 3) Production: Audience intelligence drives asset creation and production.
- Among Ad Age Top 25 Ads of 2025, eight were **created in-house** (if you include embedded or hybrid in-house structures, e.g. Forge, Gap):
 - 1) A24 – “Marty Supreme” (In-house)
 - 2) Prada – “Ritual Identities” (In-house)
 - 3) AG1 – “Good Morning, Moon” (In-house)
 - 4) Rugiet – “Second Half Rally” (In-house)
 - 5) Ralph Lauren – “Oak Bluffs” (In-house)
 - 6) Polaroid – “The Camera for an Analog Life” (In-house)
 - 7) “Zohran for NYC” – Forge (classified as in-house/embedded design co-op)
 - 8) Gap – “Better in Denim” (marked as “Gap + Invisible Dynamics,” functionally an internal-led model)

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

- 1) Wieden+Kennedy (Yeti – “Don’t Get Them a Yeti” and Nike – “So Win”)
- 2) Isle of Any (The New York Times – “It’s Your World to Understand” and ChatGPT – “Dish, Pull-Up, Road Trip”)
- The World Federation of Advertisers (WFA) released its **Advancing Marketing Procurement** report showing that a deeper collaboration with marketing procurement can be a quiet competitive advantage for CMOs—and a powerful ally, from sourcing to resourcing and from tactical involvement to best-in-class collaboration. Yet 26% of procurement leaders say they don't have enough resources, and 17% say they are too focused on cost-saving. The report also indicates that procurement is also experimenting with AI to automate lower-value procurement tasks, so teams can focus on what really matters.
- **Stagwell** formed a strategic partnership with the AI agentic company Gradiol, combining Stagwell's design, creative, and AI expertise with Gradiol's agentic execution engine to help brands connect their marketing workflows more efficiently and deliver personalized experiences across channels using AI agents. Gradiol clients include AWS, Adobe, and Dentsu's Merkle.
- Per **RECMA's** Diagnostics Report, Omnicom media agency OMD Worldwide was named best-performing global media network, followed by Starcom, Zenith, Havas, and Initiative. At the group level, Publicis Media was named best performing, followed by Omnicom Media and WPP Media (previously in the top spot). By agency network in North America, Publicis Media's Spark Foundry was top ranked, followed by OMD, Starcom (also Publicis-owned), and IPG's Initiative. The top three performing agencies in EMEA were OMD, Havas Media, and Starcom. In LATAM the top three performers were Havas Media, Initiative, and UM. In APAC, they were OMD, PHD, and Mindshare. The fastest-growing agency over the past three years was Dentsu's iProspect, followed by Starcom, Hearts & Science, Zenith, and Spark Foundry.
- Per **COMvergence**, there were 2,890 media account moves and retentions in 49 countries involving 1,700 advertisers and totaling \$26.2 billion in the first three quarters of 2025. Independent agencies captured \$3.6 billion (13%) of total spend reviewed, with Horizon Media leading indie shops with key wins (Spectrum's \$800 million and Peloton's \$225 million accounts). Publicis Media was the leader among the major holding groups in new business activity in 2025, generating \$7.7 billion in net new client billings (or one-third of all media spent shifting) in the first nine months of the year alone, including Coca-Cola in North America, Aldi, Barilla, Campari, Friesland Campina, Dropbox, Goodyear, LinkedIn, Mars, Paramount, PayPal, and Santander. IPG Mediabrands (now retired as a brand as part of the Omnicom-IPG merger) ranked second with \$2.5 billion in net new business and Dentsu third. WPP Media was the only one of the Big 6 groups to lose ground, losing \$5.4 billion in media spend to other agencies.

- **Vivaldi Group** entered into a strategic collaboration with full-service professional services firm **Andersen Consulting**. With operations in 45 countries and more than 20,000 professionals, Andersen Consulting will collaborate with Vivaldi Group to strengthen its integrated and scalable solutions and combine scale and infrastructure with expertise across strategy, brand, and innovation.
- The WFA released its **The Future of the Media Organization** study, developed in partnership with mediasense. Key findings:
 - 1) Media must be rooted in growth strategy; consider rethinking the global-local balance
 - 2) Integration may be the next competitive advantage
 - 3) Consider how you define the agency relationship (and how much in-housing to consider)
 - 4) Capabilities may matter more than headcount

Only 13% of respondents say their current agency model fully aligns with their future requirements. A majority (60%) believe the model is right in principle but requires improvement, while nearly 1 in 5 (17%) consider it unfit for purpose. 77% of brands agree that improving this integration should be a focus. However, there is much less appetite for formal structural consolidation—only 25% support merging media and creative within a single holding company, with more than half (51%) actively disagreeing.

- The world's leading marketing data and analytics firm, **Kantar**, released its **Connected Data, Intelligent Decisions: The GenAI Playbook for Marketers**.

Key recommendations:

- 1) Data audit (find the signal)
- 2) Ingestion (reduce friction)
- 3) Enrichment (create truth)
- 4) Harmonization (make it comparable)
- 5) Democratization (put insight in the flow)

- **Flock** released its 2025 Marketing Procurement white paper titled "**Marketing Procurement Reloaded: Growth in the Age of AI**," revealing how leading procurement teams are redefining their role to drive growth, efficiency, and innovation in an AI-powered marketing landscape.

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

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Check out our new article "**3 Key Industry Shifts Redefining the Future of Client–Agency Partnerships**": The rules of engagement are being rewritten, and transforming what partnership truly means.

New agencies or capabilities, restructurings, and reorganizations:

- **Omnicom Group** announced its new organizational structure across six business groups (media, public relations, production, commerce, advertising, and diversified agency services) following its acquisition of Interpublic Group of Cos. Toward Omnicom's cost-reduction target of \$750M, the new structure eliminates three creative networks (DDB, FCB, and MullenLowe), reorganizes media operations, and integrates data and tech platforms.
- As part of **Omnicom's acquisition of IPG**, IPG folded MullenLowe into TBWA and Omnicom folded DDB Worldwide into TBWA. Omnicom now has only three global creative networks: TBWA (which includes Omnicom's DDB and IPG's MullenLowe), BBDO (which includes IPG's FCB), and McCann (historically part of IPG). Adam&Eve merged into TBWA in the UK, US, and German markets. The US Advertising Collective (previously known as the Omnicom Advertising Collective) will continue to house a mix of smaller Omnicom and IPG shops, including Goodby Silverstein & Partners, GSD&M, Lucky Generals, Zimmerman, Carmichael Lynch, The Martin Agency, Deutsch, Lola, Africa, and Merkley & Partners. Omnicom Media operates five global media agency brands: OMD, PHD, Hearts & Science (all prior Omnicom), Initiative, and UM (all prior IPG). Mediahub, an IPG agency primarily focused on the US, will house IPG's data broker Acxiom. Omnicom's data, identity, commerce, platform, and AI infrastructure ecosystem includes Acxiom (from IPG), Flywheel (from Omnicom), and Omni.
- **Omnicom** restructured its various legacy media brands into a new Omnicom Media Group org structure consisting of six flagship media agency services brands: OMD, Initiative, UM, PHD, Hearts & Science, and Mediahub. The group represents \$73.5B in "buying power," up from the prior \$65B combined media spend under its management (and an estimated 7.4% share of global ad spending).
- Nashville-based award-winning independent Bohan agency rebranded as **Artists&Outlaws** to emphasize the creative tension between business and artistry ("When you dare to disrupt, you need the heart of an artist and the spirit of an outlaw"). The roster includes healthcare, travel, restaurants, and entertainment clients. The firm recently launched Fresh Consumables, its content production studio.
- Madrid-based **Globant** combined its marketing and advertising disciplines under Gut Network, aligning AI, digital marketing, digital consumer experience, social, content, media, martech, and analytics. Combined clients include AB InBev, Mercado Libre, P&G, Kraft Heinz, Verizon, FIFA, F1, Electronic Arts, and Okta. The firm is opening two new offices in Bogotá and Copenhagen to serve clients such as Biogen and Alfa Sigma.

• Dallas-based independent **PMG** launched a new commerce and retail "data connection" to its homegrown Alli operating system. The expansion of Alli integrates Velocity, a proprietary retail and media intelligence platform originally developed by Momentum Commerce. It allows the tracking of more than 37 million products and 880,000 brands across Amazon, Walmart, Target, Instacart, and other retail platforms. Momentum Commerce is now part of PMG.

- Three former Cashmere executives launched **Currency Advisory Group**, an LA-based consulting firm that applies cultural expertise for C-suites, brands, agencies, and private equity firms to help grow their businesses. Their methodology, Culture Capital Engineering™, identifies cultural misalignment, uncovers untapped cultural equity, and converts both into competitive advantage.
- Per **McKinsey & Company**, five takeaways to rewire martech "from cost center to growth engine":
 - 6) Treat martech spend like media for ROI accountability
 - 1) Expose the 10x tool sprawl complicating your martech stack
 - 2) Unlock conversions by up to 40% with AI-driven journeys
 - 3) Close the capability gap with people, not platforms
 - 4) Elevate martech to the C-suite agenda
- A venture capital firm launched a new agency, **Spacecadet Studio**, focused on emerging tech startups in areas such as AI, aerospace, blockchain, energy, robotics, and biotechnology. Capabilities include strategy (brand strategy, brand architecture, brand planning), design (visual identity, verbal identity, user experience), and marketing (video, social, viral engineering). Clients include Cytronic, Autograph, Sperm Racing, Lir Therapeutics, and Gold Gang.

AI (artificial intelligence):

- In strategic partnerships with AI research company Anthropic, **NVIDIA** is investing \$10 billion and **Microsoft** \$5 billion in a move to provide advertisers with the processing power for advanced advertisements and content, as well as analytics and data to measure performance. News reports said Anthropic will scale up its Claude AI model on Microsoft's Azure platform, and use Nvidia's Blackwell and Rubin semiconductors.
- **Publicis Groupe** accelerated production capabilities spanning global content studios, cutting-edge production capabilities (Harbor, its production and post-production studio and its social-first content production agency, Boomerang), its proprietary AI technology platforms, including GenAI partnerships, and global production hubs (five global hubs, 52 locations covering 200 markets). Leona, the world's first Intelligent content agent (through a simple conversational interface connecting audience insight with creative assets), is at the core of Publicis Production to connect the entire content supply chain.

- **Nestlé** launched a new AI-powered content service using digital twins to scale high-quality product visuals for e-commerce and digital media, developed in partnership with Accenture Song and built on NVIDIA Omniverse (NVIDIA AI Enterprise for Generative AI) and OpenUSD. It helps Nestlé's Integrated Marketing Services, with 250 marketing experts in seven marketing hubs and 45 content studios around the world, deliver personalized, multiformat content and strengthen brand presence across online channels.
- PepsiCo-owned **Gatorade** launched a new generative AI-powered design experience (Gatorade.com/ai) that allows athletes to express their unique styles and interests through nearly endless personalization possibilities on Gatorade Squeeze Bottles in partnership with Work & Co, part of Accenture Song, using Adobe Firefly. After selecting a favorite design, anyone can purchase their one-of-a-kind Gatorade Squeeze Bottle for \$34.99.
- **Mondelēz International** evolved its generative AI tool, AIDA (AI + Data), to produce content faster at lower cost and personalize its advertising for consumers while boosting engagement for many of its top brands, including Oreo, Chips Ahoy!, Ritz, and Perfect Bar. The brand spent upward of \$40 million on building the capability and expects the tool could cut the cost of creating marketing content by up to 50%.

- The Association of American Advertising Agencies (4As) released its **The State of Generative AI inside US Marketing Agencies 2025** report, based on a study conducted in partnership with Forrester, inviting agencies to change their marketing services commercial model to pay off the promise of AI. The report highlights investment levels, ROI expectations, and how agencies are leveraging technology, including implications for brand advertisers and legal and commercial barriers impacting GenAI integration.
- Per the WFA's **In-housing AI (Perspectives from the people powering in-house creativity)** report, most in-house agency teams are either experimenting with (65%) or partially implementing (71%) AI within their processes with some successes: faster content production (40%) and increased efficiency (33%). 93% plan to invest further in AI in the next 12 to 24 months. Roadblocks include ethical concerns such as authenticity and AI bias (64%), data privacy concerns (57%), and integration with existing tools and brand IP/copyright (50%).
- Per the WFA, **brands and their media agencies are using AI** essentially to enable faster reporting, followed by transforming media agency relationships, enabling more informed, strategic decision-making, and enabling increased agility and responsiveness. Improving media AOR is also of importance.



ARTICLE

Raising the bar in the events space: Spending smarter without compromising experience

Contributed by: Claire Randall Consulting

The Challenge Brands Face

Events are still one of the most powerful ways for brands to connect with people. The sheer number of events has exploded post-pandemic and “good enough” no longer cuts it - brands need to create memorable, meaningful experiences that attract audiences to stand out from the crowd.

With the luxury market in decline, yet audiences expecting more, events need to deliver at every level and not just IRL, but online as well. The challenge for brands is not just the consumer experience, the most pressing issues are the ever-increasing costs for venues, staffing, production, catering and travel which if not planned, monitored and optimized, means budgets can get out of control.

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

- CPG advertiser **Reckitt** deployed generative AI (Gemini, OpenAI) to automate repetitive daily marketing tasks, speed up creative asset adaptation (a 30% lift), approve campaign artwork based on regulatory brand and legal rules, and monitor overall brand performance by combining Nielsen data with other internal and external data types (a 20 to 40% time gain efficiency). The brand identified 10 to 12 marketing activities AI could support without reducing agency dependency.
- **Google** updated its AI image-generation functions in Google Ads, releasing Nano Banana Pro (using advanced AI built on Gemini 3) and making it available to advertisers globally for free in Asset Studio and other Google properties. It provides creative and editing features (enabling the creation of complex, professional-grade images in less than 10 seconds with the ability to add multiple products in one scene) to help reduce budgets and turn imaginative concepts into images in less time and improve ad performance. All media generated by this tool is embedded with its SynthID digital watermark.
- Brands and agencies are **creating assets at scale using AI**. For example, The Brandtech Group, a tech-powered group and alternative to the traditional holding company known for in-housing pioneer Oliver and its AI-drive production capability, created 235,000 pieces of content for top clients, including Unilever, at a pace 62% faster and 55% cheaper than previous processes in Q1 2025 alone using its Pencil Pro enterprise generative AI platform as part of its “content supply chain” efforts. Procter & Gamble’s AI Studio collapsed a 30-day, \$30,000 process (to prompt evaluations of new creative using prior copy test results) into a one-day, \$1,000 process.
- Marketing intelligence platform startup **Alembic** raised \$145 million in its latest fundraising round (Series B) with help from growth equity firm Prism Capital, Accenture, WndrCo, and SLW, valuing the company at \$645 million. The firm uses AI to analyze data, connecting every marketing dollar spent to revenue and eliminating blind spots and wasted budget for clients such as NVIDIA. Alembic is known for its proprietary Spiking Neural Network technology and causal algorithms as well as its prediction modeling that offers 30-60-90-days forecasts. The firm also automates marketing planning with its Alembic Intelligence Brief, revealing drivers of revenue and key KPIs across all marketing initiatives and eliminating the need for dashboards.
- Swedish-based **Stravito** launched AI Personas, an AI tool that brings together a company’s knowledge and turns it into always-on, interactive, segment-specific consumer profiles, so marketing and insights teams from clients such as Delta Air Lines, Heineken, and Pernod Ricard get specific, relevant insights they need to test, refine, and co-create ideas in real time. AI Personas can build dynamic personas from a brand’s own research and segmentation, generate, improve, and iterate on concepts dynamically, and compare reactions across audiences to spot diverse perspectives.
- **WPP** and **Google** deepened their partnership, announcing a five-year expansion dedicated to advancing cloud and AI technology. It includes a \$400 million spending commitment from WPP for Google technologies. Other partnership components include rapid bespoke AI model development and bespoke AI solutions built with Gemini, secure, privacy-first data collaboration, early access to Google’s latest AI models (including Veo and Imagen), integrated within WPP Open, preferred access to Google’s cutting-edge AI, expansion of the Creative Technology Apprenticeship program with Google, and integration of Google’s advanced AI into WPP’s workflows (for tasks like automated data analysis, intelligent resource allocation, and instant access to global insights).
- **WPP** launched WPP Open Pro, a self-service version of its AI marketing platform designed to help brands plan, create, and publish campaigns on their own, in a move to compete with other tech platform providers (Google, Meta, Adobe) and target small and midsize companies.
- **Stagwell** announced a partnership with data analytics company Palantir to create an AI-driven platform that lets brands themselves manage campaigns, creative testing, and audience targeting. The new stand-alone solution (via Stagwell’s suite of Marketing Cloud products) pairs Palantir’s Foundry with Code and Theory’s orchestration level software and Marketing Cloud’s proprietary data sources and solutions. It allows brands to sift through tens of millions of records to identify, segment, and better understand audiences.
- **Stagwell** launched another self-serve platform to its suite of offerings, NewVoices.ai, an AI agent-driven workflow management tool. The platform offers an agent studio that allows users to create, train, and manage enterprise-grade voice and chat agents via an interface that can adjust for tone, logic, and workflows for sales/revenue, customer support, payments/operations, etc.
- **Chiefmartec** and **MartechTribe** released their **Martech for 2026** report, highlighting that the agentic era of marketing has begun. 90.3% of companies reported that they’re using AI agents (for marketers, for customers, and of customers) somewhere in their martech stack. Most popular agents include:
 - 1) Content production agent (68.9%)
 - 2) Publishing AI-optimized content such as FAQs (63.1%)
 - 3) Customer service chatbot agents (54.4%)
 Others (under 50%) include audience discovery/segmentation agent, competitive analysis agent, prospecting/researching agent, and social media agent.

- Per **Chiefmartec**, **creative production tools** that are top AI innovators include: video creation platforms such as Descript, HeyGen, Runway, and Synthesia; leading DAMs such as Bynder, Canto, and Frontify; design platforms such as Adobe, Canva, and Figma; copywriting wizards such as Jasper and Superhuman (formerly Grammarly); and platforms to manage the end-to-end creative pipeline such as Adobe, Cloudinary, Gradiol, and Typeface.
- Per Tim Williams of **Ignition Consulting Group**, “**What should agencies do with profit realized from the reduced staffing costs realized through the use of AI?**”:
 - 1) Create a new line item on your P&L labeled “Product Development,” (at least 7% to 10% of your total revenues—roughly the same amount most agencies currently spend on new business)
 - 2) Assemble (or hire) a small team fully devoted to product development initiatives
 - 3) Leverage the AI tools of your choice to help you sift through, organize, and prioritize your core competencies, offerings, and intellectual capital
 - 4) Use these same AI tools to help you answer, “What are the types of problems we most often solve for our clients?”
 - 5) Identify six or seven programs (or solution sets) that you will commit to develop in the coming year
 - 6) Ask your product development team to organize the work in a time-boxed series of sprints designed around key milestones that will result in the development of at least three programs
 - 7) Launch your new programs with a test-and-learn mindset

“

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

”

Bruno Gralpois

Co-Founder, Agency Mania Solutions



Check out our jointly developed white paper with A&MPLIFY by Alvarez & Marsal titled “[Drowning in Data, Starving for Insight](#).” Leaders don’t want more dashboards; they want proof that marketing spend drives revenue and profit.

Noteworthy quotes:

- » “2026 will be a very special year for us, as we end our first century. A century where we have turned a small hot shop from Montmartre into the industry’s largest holding company over the last two years.” —Arthur Sadoun, Chairman and CEO, **Publicis Groupe**
- » “The age of the agent is ending. Marketing agencies are no longer just service providers —they’re becoming purveyors of solutions, platforms, capabilities, and outcomes.” —Jay Patisall, VP and Principal Analyst, **Forrester**
- » “What is a holding company? A financial owner of weakening portfolio companies—or an operating company with declining financial performance?” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “The agencies that figure this out stop being vendors. They become the layer that makes everything else work. And that layer doesn’t get disintermediated. It gets more valuable as the system grows.” —Craig Elimeliah, CCO, **Code and Theory**
- » “When it comes to AI, the biggest mistake companies make is thinking about efficiency—they’re not thinking about top-line growth.” —Rafael Flores, Chief Product Officer, **Treasure Data**
- » “The media organization of the future will look very different from today’s. It will require integration-first thinking, multiskilled talent and clear decisions on what to own internally and what to entrust to partners.” —Jack Shearring, Head of Transformation, **mediasense**
- » “The most competitive marketers in the next five years are not going to be ones that can code...but the ones who are these strategic and empathetic directors of AI tools.” —Alexis Karsant, Senior Director, **Intuit Mailchimp**
- » “We’re seeing the convergence of creative, data, commerce and technology demand new skills [from WFA Media Forum members], and, potentially, a reimagining of the internal organization itself.” —Tom Ashby, Global Lead, Media Services, **WFA**
- » “Everyone has access to the same tools. How you make connections and how you put that in service of the work is where the magic comes from.” —Nimisha Jain, Chief Strategy Officer, **Highdive**

- » “AI lets you turn creative into systems. Ideas become logic. Campaigns become templates. Brand becomes code. That’s not automation replacing creativity. It’s creativity becoming scalable.” —Craig Elimeliah, CCO, **Code and Theory**
- » “Many mid-sized and independent agencies are waiting in the wings to absorb dissatisfied Omnicom and IPG clients.” —Jay Patisall, VP and Principal Analyst, **Forrester**
- » “Things become agentic when you combine the ability of AI models to reason with tools and perform actions in the external world.” —Tejas Manohar, Co-CEO, **Hightouch**
- » “Once singularly focused client partners, marketing agencies are forgoing their franchise to act as agents on behalf of clients.” —Jay Patisall, VP and Principal Analyst, **Forrester**
- » “Clients are telling us that they want our offer to be simpler, more integrated, powered by media data and AI, efficiently priced and designed to deliver growth and business outcomes.” —Cindy Rose, CEO, **WPP**
- » “WPP paying McKinsey & Company to fix the very problems WPP created? When the world’s biggest agency outsources its strategy to a consulting rival, that’s not a partnership. That’s a surrender.” —Alex Richards, Regional Vice President of Partnerships, **Quantum Metric**
- » “The difference between ‘enlightened’ and ‘unenlightened’ procurement lies in priorities. Enlightened procurement focuses on delivering the right solution and maximizing ROI—not just cutting costs.” —Eric Samuelson, VP of Client Pricing and Procurement, **Sparks**
- » “From my perspective as a longtime champion of agencies, AI represents an opportunity to create what clients have been demanding for years, more automation of tasks that could best be described as ‘doing the dishes,’ freeing up more opportunity for thinking time and better creativity.” —Charley Stoney, CEO, **European Association of Communications Agencies (EACA)**

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



Influencer marketing has surged into the mainstream, yet the industry still wrestles with proving impact—only a quarter of brands can tie efforts to sales even as budgets climb. Cultural relevance is now seen as the operating system of human behavior, but most companies fall short of activating it meaningfully. Meanwhile, AI continues to reshape marketing at breathtaking speed: from Kantar's sweeping 2026 trends—which spotlight synthetic data, micro-communities, and creative intelligence—to Emplifi's findings that marketers are doubling down on AI-driven productivity, predictive analytics, automated creative, and short-form content. The creative landscape is being rewritten in real time, with Svedka's fully generative Super Bowl ad marking a bold new frontier and award winners across the globe—from Garage Beer's authenticity-powered rise to Dentsu Creative New York's Grand Prix streak—proving that courage, innovation, and cultural acuity fuel disproportionate wins. Across campaigns, categories, and continents, the message is unmistakable: The brands and agencies shaping the future are those daring enough to reinvent the rules. The future doesn't wait; boldness wins, brilliance scales, and reinvention rewards the brave. No more guesswork. No more waste. Better work is what all brand advertisers are aspiring to do in 2026.

- Per the **WFA's Effective Influencer Marketing Report**, influencer marketing is now mainstream, with an average of 8.35% of total ad spend, and with more than half of brands expecting budget increases. However, only 25% can confidently link campaigns to sales.
- The **ANA** released its **The Impact of Culture on Brand Building** report, redefining “culture as the ‘operating system’ of human behavior.” 88% of brands claim it’s very important or important for brands to engage in culture, but only 44% report that their companies often do so.
- **Kantar** released its **2026 Marketing Trends** report. The key 10 trends:
 - 1) Agents of change: from attention to intention
 - 2) Brand building with AI: human connection through machine selection
 - 3) Synthetic data, augmented audiences
 - 4) Transform creative optimization into creative intelligence with AI
 - 5) Treatonomics: enjoying every day
 - 6) Experiment to accelerate: innovation as an engine for growth
 - 7) Brands at the crossroads: authentic inclusion drives growth
 - 8) Unlocking retail's media potential: growth through collaboration
 - 9) Creators need to earn their place at the marketing effectiveness table
 - 10) Micro-communities become a major force in social media marketing.

Per the report, brands that disrupted themselves or their category created \$6.6 trillion of incremental value in the last 20 years.

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

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

Awards:

- Columbus, Ohio-based **Garage Beer** was named Ad Age Marketer of the Year for 2025, winning praise for turning creativity, humor, and an engaged fan community into explosive growth-proof that authenticity beats big budgets when a brand dares to be itself, especially while growing when much of the beer category is declining. The firm has a six-person marketing team (mostly in-house creative) and is known for grassroots-heavy sponsorships, organic growth via social media, community engagement, and giveaways.
- Per the **Drum Awards 2025 Grand Finale**, winners included:
 - 1) The Romans (Independent Agency of the Year), Interpublic Group (Holding Company of the Year)
 - 2) Area 23 (Network Agency of the Year)
 - 3) Stein (B2B Agency of the Year)
 - 4) Hopeful Monsters (Underdog Agency of the Year)
 - 5) Unilever (Advertiser of the Year)
 - 6) Grand Prix of Grand Prix 2025 was Dentsu Creative New York for Mondelēz International
 - 7) In advertising, Grand Prix Gold Winner was Made To Share by VCCP for Mondelēz International
 - 8) Integrated Campaigns Gold winner was Glassphemy by VML UK for Diageo

- Top winners of **Drum Awards Festival and its Social Media Awards 2025** included Dentsu Creative New York and Mondelēz International—Grand Prix winners at the Social Media Awards 2025 for the “Nutter Butter, You Good?” campaign, which targeted Gen Z through TikTok. Other notable winners:

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

- Per Ad Age, based on their top 25, here are the **top 10 ads of 2025**:

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

“ BRUNO GRALPOIS from the new article:
10 Hard Truths Every CMO Must
Confront to Lead Fearlessly

**Comfort breeds
complacency.**

**Discomfort,
when purposeful,
is where
breakthrough
thinking begins.**

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- Per **Adweek**, Mischief @ No Fixed Address was awarded 2025 US Agency of the Year. Other 2025 winners included:
 - 1) Billion Dollar Boy as Social/Influencer Agency of the Year
 - 2) Special US as Breakthrough Agency of the Year
 - 3) Wieden+Kennedy as Global Agency of the Year
 - 4) IW Group as Multicultural Agency of the Year
 - 5) Mirimar as Small Agency of the Year
 - 6) Known as Midsize Agency of the Year
 - 7) Code and Theory as Innovation Agency of the Year
 - 8) FCB as Agency Network of the Year
 - 9) Rethink as Independent Agency of the Year
 - 10) VCCP as International Agency of the Year

Noteworthy quotes:

- » “Shrinking margins from cost-cutting, competition from insourcing and consultancies, multiple client stakeholders, and tech-partner disintermediation pushed agencies to consolidate capabilities and include technology as part of their offerings.” —Jay Patisall, VP and Principal Analyst, **Forrester**
- » “Marketing leaders must cut through information overload, think critically and translate complexity into clarity for their teams.” —Eleni Kitra, Executive Director, **Advertising Business Group Middle East**

- Per **Agency Compile 2025 New Business Awards**, celebrating teams at the forefront of agency growth, top teams of the year were: BarkleyOKRP (large agency), XD Agency (midsize agency), and Press Kitchen (small agency). Finalists included Havas North America, Digitas, Highdive, Allen & Gerritsen, and Mason.
- Per **MediaPost**, MRM's (formerly part of Interpublic's McCann Worldgroup, now part of Omnicom's Omnicom Precision Marketing Group) ARM (AI Relationship Management) practice was awarded 2025 Media Agency of the Year. Other winners included PMG as Independent Agency of the Year and WPP Media as Holding Company of the Year.

- » “Creative agencies must stop selling deliverables and start building engines.” —Craig Elimeliah, CCO, **Code and Theory**
- » “A good brief doesn't guarantee good creative—but it dramatically improves your odds.” —Andrea B. Ruskin, Partner and Co-Founder, **Blum Consulting Partners**
- » “The boundaries between media, content and commerce are dissolving, and the question is no longer whether media should evolve, but how quickly and decisively.” —Jack Shearring, Head of Transformation, **mediasense**



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10 Hard Truths Every CMO Must Confront to Lead Fearlessly

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

Check out our newest article, “**10 Hard Truths Every CMO Must Confront to Lead Fearlessly**”: A candid look at the choices, challenges, and convictions that define modern marketing leadership in a new partnership era.

FINANCIALS: Driving efficient use of resources

 Adobe announced that shoppers in the US spent a record-shattering \$44.2 billion online during the five-day stretch following Thanksgiving. WPP is set to exit the FTSE 100 after more than 25 years as its shares reached their lowest level since 1998. The drop follows a sharp decline in WPP's market value, which fell to 117th among UK-listed companies, below the FTSE 100's eligibility threshold. Meanwhile, global advertising is entering a new era of scale, scrutiny, and structural reinvention. Forecasts show the industry breaking the **\$1 trillion** barrier in 2026 with **5.1% growth**, outpacing global GDP and fueled by major global events, surging digital investment, and the continued rise of algorithm-driven media, which will exceed **70% of all spend**. Retail media, online video, and social remain the engines of momentum, while tech—powered by relentless AI innovation—emerges as the fastest-growing sector. Marketers and advertisers are spending more: The world's top advertisers boosted 2024 investment by **6.6%**, with Amazon once again dominating at over **\$21 billion**. Yet beneath this growth lies mounting tension. Compensation models are outdated, performance incentives are fading, agencies face cash-flow strain and unpaid scope creep, and the industry confronts inflation variability across regions and channels. Regulatory and ethical concerns intensify as lawsuits challenge media practices and holding-company accounting comes under fire. Meanwhile, M&A is reshaping the landscape—from Netflix's pending landmark acquisition of Warner Bros. to strategic deals by Havas, Bond, Wpromote, and Adobe that fuse data, creativity, and AI at unprecedented scale. Across every corner of the ecosystem, one truth rings clear: The future belongs to those who master AI, measure what matters, and rebuild commercial models for a world accelerating faster than ever. Growth is rising, rules are shifting, and the leaders will be those bold enough to rewrite the playbook.

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

- Per Ad Age, the 50 **biggest US advertisers** increased advertising and marketing spending in 2024 by 7% to \$136 billion while the world's top 50 advertisers boosted spending by 6.6% to \$291 billion. Median ad spending growth—the midpoint growth rate—for the top 50 US advertisers was 5.4% in 2024 while median ad spending growth for the world's 50 largest advertisers was 3.2%. Amazon was the world's biggest advertiser for the fourth consecutive year and the top US advertiser for the sixth year in a row, spending a record \$21.4 billion worldwide on advertising and promotion in 2024, up 5.4%, and an estimated \$14.1 billion in the US, up 5.7%. Retail was the biggest advertiser category in 2024, representing \$38.1 billion or 18% of total US measured-media spending, followed by finance and insurance (12%). Alibaba, Alphabet, Amazon, and PDD are among 10 internet-centric companies in the world's top 50 ranking. Six of the world's top 10 internet ventures—Alphabet, Amazon, Booking Holdings, Expedia Group, Flutter Entertainment, and Netflix—are based in the US. Of the top 50 US advertisers, 39 have headquarters in the US. The US is home to 26 of the world's top 50 advertisers.

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

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

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

- Per Michael Farmer, **seven crises contributed to the weakening of media and creative agency effectiveness for clients**:

- 1) The shift from 15% media commissions to staff-hour billing
- 2) Introduction of procurement into client-agency relationships
- 3) Split of media agencies from creative agencies
- 4) Acceptance of separate (rather than integrated) digital and social agencies
- 5) Ignoring the substantial slowdown in advertiser brand growth rates after 2008
- 6) Initiation of nontransparent and principal-based media operations
- 7) Introduction of AI into creative and media operations

- The ANA released its 19th edition of the **ANA Trends in Agency Compensation Report** with the following key findings: Fees are predominantly used by 84% of brands; use of performance incentives with at least one of their agencies has declined to 15% (its lowest level since 1991—qualitative agency performance reviews are used to evaluate agency performance in nearly 9 out of 10 relationships); CMO or the brand leader own the compensation model decision in 73% of the cases; the two agency services for which agencies are used on a project basis the most are strategic/branding (71%) and influencer/creator marketing (60%).
- **WPP** is involved in a \$100 million lawsuit filed by a former executive at the company alleging that he was terminated for raising concerns about improper inventory and rebate practices related to media buys by GroupM/WPP Media (the claim is that \$1.5 billion to \$2 billion of rebates should have been returned to clients but that WPP pocketed instead).
- Per the WFA, **global media inflation** is expected to stabilize at 4% in 2025 and 2026 (3% to 4% in the US, 3% in the UK, and 4% to 5% in Western Europe), mirroring the wider economy. Other key findings: Eastern Europe (11%) and India (9%) are seeing the steepest price growth, mostly due to rising audience value and domestic advertiser demand. Prices for connected TV are almost flat (1%), but broadcaster video-on-demand commands the strongest price inflation of any channel (about 5% per year). Linear TV inflation remains about 5%. Paid search, social video, and retail media are all inflating in line with the global average (4% to 5%).
- Per Adobe Analytics, **AI-driven traffic to US retail websites on Black Friday 2025** increased 805% compared to the previous year, and shoppers arriving via AI services were 38% more likely to complete a purchase. US e-commerce sales rose 9.1% to \$11.8 billion while in-store traffic dropped 3.6% YOY.
- **4As** released its 2025 Billing Rate Benchmark Report with updated agency hourly billing rates. This report is a helpful framework for both agencies and advertisers when establishing benchmarks and pricing in the US. The report is a mix of network (52%) and independent (48%) agencies, 36,000+ data points, including 1,400+ blended rate data points from 163 offices across 239 agencies and 69 new job titles.
- Per Ignition's **2025 US Agency Pricing and Cash Flow report**, 78% of agencies don't bill for out-of-scope work, 97% chase late payments, and 63% claim that cash-flow volatility is limiting their growth.
- Professional services firm **A&MPLIFY by Alvarez & Marsal** released its "**Drowning in Data, Starving for Insight**" white paper, produced in close partnership with Agency Mania Solutions. The paper highlights that brands are richer than ever in data yet poorer in insight, and struggle with aligning marketing metrics to revenue and EBIDTA.

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Reinvented**

From cost control to clarity,
alignment to stronger
partnerships

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Check out our article "[Benchmarking, Reinvented: From cost control to clarity, alignment to stronger partnerships.](#)"

- **ECI Media Management** released its **2026 Media Inflation Report**. Global media inflation is expected to ease to 3.1% in 2026, down from 3.8% forecast for 2025, the lowest level since 2014, excluding 2020—the first year of the COVID-19 pandemic. Factors behind the slowdown include declining headline CPI inflation and a general cooling off of the media market in general following a couple of years of high demand. Per the report: The medium expected to see the highest inflation in 2026 is OOH with 4.2%, followed by online video with 4.1%. TV is at 3.2%, online display at 2.7%, and, the lowest forecasts, radio at 1.1% and print at 0.6%.
- Per **Forrester**, agencies and brands must reimagine their commercial relationship in the context of the “AI cost center crisis”: 75% of agencies bear the costs, with generative AI capabilities funded directly by the agency without passing the costs to clients while brands should compensate for that value. Forrester advocates for an evolved remuneration model to replace the current full-time-equivalent-based services model. The cost of technologies such as predictive, generative, and agentic AI could be permanently coupled with the hourly costs of the experts who wield them, focusing instead on value, outcomes, and growth rather than scopes, FTEs, and billable hours.
- **Publicis Groupe** expressed concerns over how Omnicom Group reports its financial performance and handles its accounting. Omnicom is believed to be reporting organic growth in gross revenue (e.g., revenue including pass-through costs, which are fees paid to third-party vendors such as production partners or influencers) versus net revenue (without pass-through—a standard used by others such as WPP, Dentsu, Havas, Publicis—many of which report both), therefore artificially inflating their revenue compared to key competitors.

Mergers and acquisitions (M&A) activity:

- **Netflix** plans to acquire Warner Bros., including its film and television studios, HBO Max and HBO, following the separation of Discovery Global, for a total enterprise value of \$82.7 billion. The deal will bring together two pioneering entertainment businesses, combining Netflix's innovation, global reach, and best-in-class streaming service. **Paramount Skydance Corp.** launched a hostile takeover bid for Warner Bros. Discovery Inc. at \$30 a share in cash shortly after Netflix's offer. The offer values Warner Bros. at \$108.4 billion, including debt.
- Toronto-based agency **Bond** acquired UK CRM agency Armadillo in a move to strengthen its personalized marketing capabilities across nearly 200 million consumer profiles worldwide. The combined entity (850 employees) is a specialist in customer intelligence, loyalty, behavioral science, and data and analytics in North America and Europe, assisting clients in strengthening ties to customers, media partners, and employees for brands such as Adobe, Bath & Body Works, Ford, Gap, McDonald's, and Sephora.

- **Havas** acquired French data consulting and engineering firm Unnest in a move to boost its expertise in designing and deploying data platforms. Unnest will be aligned with Havas Media Network's global data, technology, and analytics arm, CSA, whose unit helps clients with digital transformation solutions.

- **Havas** acquired London-based experiential agency Bearded Kitten with offices in Lisbon and Sydney and clients such as Netflix, Unilever, Intuit, Red Bull, Pokémon, Google, Disney, and L'Oréal. The agency rebranded as “Bearded Kitten, Part of Havas Play” and will join Havas's experiential division Havas Play, part of Havas Media Network.
- **Havas** acquired Australia-based independent media agency Kaimera, which will join the Havas Media Network. This acquisition increases Havas ANZ's staff to 450 with resources from Sydney, Melbourne, and Auckland, New Zealand.
- Performance marketing agency **Wpromote** (Ad Age 2025 Performance Agency of the Year) acquired creative firm Giant Spoon in a move to combine strategy, creative, tech, media, and performance marketing under one roof. The combined entity (700+ employees) will operate as Wpromote x Giant Spoon with a single P&L, and leverage its Polaris IQ, an AI intelligence platform that helps inform media strategies and customer insights. Clients include HBO, Lucid Motors, Walmart, Google, Peacock, and Intuit QuickBooks.
- **Adobe** acquired Semrush, a software platform known for providing SEO and AI-driven marketing tools to companies like Amazon, for \$1.9 billion. The move is to enhance its AI capabilities and help marketers better understand how their brands are displayed to consumers online and run better SEO.
- **Publicis Groupe** acquired HEPMIL Media Group, Southeast Asia's preeminent influencer agency. HEPMIL serves more than 450 brands through its relationships with 3,000 high-value creators, with a total creator reach exceeding 1 billion in six Southeast Asian markets. HEPMIL will continue to operate as a brand, collaborating with Publicis Groupe teams in the region.

Holding company financial performance:

- Due to the timing of earning calls with major holding companies, Q4 2025 and year-end results will be published in the next Industry Update (Volume 86).

Noteworthy quotes:

- » “Savings alone are no longer a sufficient proof of value—not for procurement and not for marketing.” —Laura Forcetti, Director, Marketing Services Asia Pacific, and Global Sourcing, **WFA**
- » “Brands want to ‘do more with less,’ but without healthy marketing partnerships, achieving growth and efficiency becomes an uphill battle. It’s time for brands and agencies to evolve their relationships by adopting transparent, transformative commercial models.” —Jay Patisall, VP and Principal Analyst, **Forrester**
- » “To deliver performance improvements, we will position our offering to be much simpler, more integrated, powered by data and AI, efficiently priced and designed to deliver growth and business outcomes for our clients.” —Cindy Rose, CEO, **WPP**
- » “The question isn’t whether creative matters. It’s whether creative agencies can finally build a business model that matches the value they claim to create.” —Craig Elimeliah, CCO, **Code and Theory**
- » “Agencies’ main performance problem is the gap between fees and scope workloads. It’s unconscionable that agencies, who generate a lot of stuff, do not measure the stuff, staff the stuff appropriately and charge for the stuff. Their scopes of work are too large, with too many unnecessary and unproductive deliverables.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “Marketers will no longer buy agency talent to produce concepts. They will buy algorithms that agency talent customizes to create, activate, and scale marketing.” —Jay Patisall, VP and Principal Analyst, **Forrester**

- » “Marketing procurement can’t (and shouldn’t) do marketing. But they can make your investments stronger, more transparent, more future-proof and easier to defend.” —Laura Forcetti, Director, Marketing Services Asia Pacific, and Global Sourcing, **WFA**
- » “Agencies with contracts that enable them to focus firmly on strategy, creativity and brand-building, working alongside your marketing teams, are key to long-term success.” —Charley Stoney, CEO, **European Association of Communications Agencies**
- » “Stop negotiating on cost-per-creative. Start negotiating on performance improvement.” —Jack Smyth, Country Lead, **Jellyfish + Brandtech Group**
- » “Client procurement often focuses on agency fees, which typically represent only 20–30% of total event spend. The remaining 70–80% covers elements like audiovisual, logistics, structures, entertainment and venues—areas that procurement teams often overlook.” —Eric Samuelson, VP of Client Pricing and Procurement, **Sparks**
- » “The reality is financial holding company executives have sought to milk agencies, particularly through cost reductions and self-dealing in media operations, rather than do the tough work to bring about changes in pricing, to strengthen the capabilities of their agencies, and to support clients by bringing effective advertising to the brand-growth problem.” —Michael Farmer, Chairman and CEO, **Farmer & Company**

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AGENCY: Agency reviews and roster changes

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

- **Delta Air Lines** kicked off a review of its global media business. The nine-year incumbent, Omnicom's PHD, is expected to defend. The agency won the US portion of the business in 2016 and won additional regions over the next few years.
- Adhesive company **Gorilla Glue** retained Betty, a Quad agency, as its creative AOR following a review. The agency will handle all creative duties for the brand portfolio (Gorilla Tape, Gorilla Super Glue, and Gorilla Construction Adhesive).
- **Henkel Consumer Brands** selected WPP Media as part of a consolidation of its European media business, expanding WPP's responsibility, including Henkel consumer brands such as Persil, Perwoll, Bref, Schwarzkopf, and Syoss in 30 markets.
- **IBM** kicked off a review of its media business. WPP Media, the incumbent, is not defending. The 31-year relationship with WPP creative agency Ogilvy is unaffected.
- Candy maker **Just Born** selected Cincinnati-based independent agency Curiosity as its integrated AOR following a review and as part of a consolidation and replacing several project-based agencies. Just Born will handle creative, strategy, media, analytics, and social for the brand's portfolio including Mike and Ike, Peeps, and Hot Tamales. The agency will partner with other specialty roster agencies such as Coyne PR and Liquid.
- Men's grooming products company **Manscaped** selected Chicago-based independent agency Quality Meats for its first Super Bowl campaign.

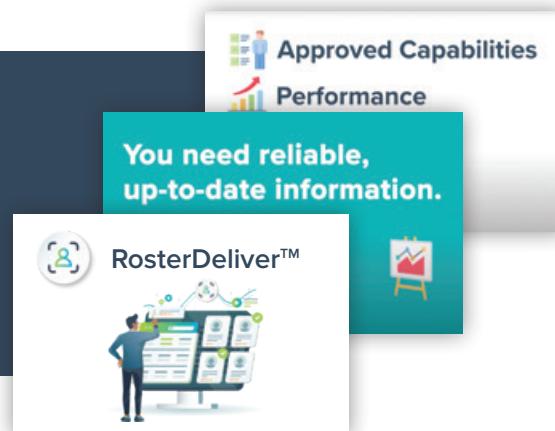
- Leading veterinary care organization **Mission Pet Health** selected independent marketing agency Acadia as its media and analytics AOR following a review, replacing incumbent Atlanta-based Cardinal. The agency will leverage its Acadia Analyze, the agency's proprietary AI-powered analytics platform.
- Auto service franchise company **Midas** selected independent Pittsburgh-based ad agency Where Eagles Dare as its creative AOR following a review, replacing incumbent Barkley. The agency will handle brand strategy, full-funnel creative across a variety of channels including broadcast, digital/social, photography, and PR-driven activations.
- Pharma giant **Novartis** selected Publicis Groupe's Fallon as its creative agency for its next Super Bowl ad following a review, replacing incumbent Omnicom's Merkley+Partners.
- Pizza chain **Papa Johns** selected Publicis Groupe-owned Leo Chicago as its new creative AOR following a review, replacing now Omnicom-owned and incumbent The Martin Agency. The agency will partner with the brand's media AOR, Dentsu's Carat.
- Professional services giant **PwC** added WPP's Ogilvy to its agency roster to handle creative and production in the US. Omnicom's McCann continues to lead PwC's global creative remit. Ogilvy will collaborate with McCann, which maintains a global mandate.
- Health and hygiene products company **Reckitt** selected WPP Media as its media planning and buying AOR across 21 European markets, replacing several incumbent agencies. WPP Media will handle all media duties for Reckitt's core brands, including Durex, Nurofen, Strepsils, Gaviscon, Veet, Dettol, Finish, and Vanish. WPP is implementing an integrated model that combines local market expertise with the company's AI-driven marketing operating system, WPP Open.

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- Power tools company **Stihl** selected (formerly IPG but now Omnicom's) The Martin Agency as its creative AOR following a review. The agency will handle strategy, creative, visual identity and design, social, activation, and production, and partner with sister agency MRM for e-commerce.
- Snap Inc** selected Seattle-based digital marketing agency New Engen as its creative AOR following a review. The agency will handle both in-app and cross-channel creative and campaigns in the US and international markets to drive engagement and loyalty. New Engen will work with regional creators worldwide and leverage its in-house content studio, Donut Studios, for building scaled, creator-driven campaigns.
- Cosmetic surgery brand **Sono Bello** selected dentsu x as its digital media AOR. The agency conducted a pilot before being selected to lead all digital strategy work for the brand's portfolio of services, including breast augmentation, advanced liposuction, and procedures to remove excess skin.
- Unilever's ice cream spin-off, **The Magnum Ice Cream Company**, selected Publicis Groupe as its media AOR following a review, replacing incumbent WPP Media's Mindshare. The agency will handle all media planning and buying duties for its brand portfolio including Magnum, Ben & Jerry's, and Cornetto.
- Driven Brands-owned fast oil change and light maintenance chain **Take 5 Oil Change** selected Atlanta-based Dagger and dentsu x as its creative and media AORs, respectively, following a review, replacing various project-based incumbent agencies.
- The **Almond Board of California** selected WPP's Grey New York as its new integrated AOR following a review. The agency will handle all integrated marketing duties including creative and new campaign work.
- Restaurant chain **Tropical Smoothie Cafe** selected Minneapolis-based Fallon as its creative AOR following a review. The agency will handle all creative duties including strategy, integrated marketing, advertising, and creative.

- Discount retail company **TJX** selected Publicis as its media AOR in the US following a review, replacing seven-year incumbent WPP's Mindshare. Publicis will handle media planning and buying for the brand portfolio including TJ Maxx, Marshall's, and HomeGoods.
- UK-based telecom giant **Vodafone** selected Publicis Groupe as its creative AOR following a review as part of a consolidation, replacing multiple incumbent agencies. The agency will handle all creative duties for the flagship brand and five operating companies globally and across local markets in Europe, the Middle East, and Africa. Publicis Groupe built a bespoke team of handpicked creatives, analysts, and account leaders and will leverage Leona, its AI-driven content creation platform (with creators and influencers) to generate real-time, insight-driven creative content.

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	E&P	Marketing	Media Relations	Public Relations	Strategic
	BBH	Marketing	Media Relations	Public Relations	Strategic
	Hybrid Advertising	Marketing	Media Relations	Public Relations	Strategic
	WPP	Marketing	Media Relations	Public Relations	Strategic
	Day One Agency	Marketing	Media Relations	Public Relations	Strategic
	WCR	Marketing	Media Relations	Public Relations	Strategic
	Fallon	Marketing	Media Relations	Public Relations	Strategic
	B&T	Marketing	Media Relations	Public Relations	Strategic
	Blue Chip	Marketing	Media Relations	Public Relations	Strategic

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Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
 DELTA	Delta Airlines	Omnicom's PHD (expected to defend)	Media	Global	Unk	IP
 Gorilla Glue	Gorilla Glue	Betty	Creative AOR	Global	Betty (retains duties)	Y
 Henkel	Henkel Consumer Brands	Unk	Media	Europe	WPP Media (consolidation)	Y
 IBM	IBM	WPP Media (will not defend)	Media AOR	Global	Unk	IP
 JUST BORN QUALITY CONFECTIONERS	Just Born	Various project-based agencies	Integrated AOR	US	Curiosity	Y
 MANSCAPED	MANSCAPED	None	Creative	Super Bowl Campaign	Quality Meats	Unk
 Mission PET HEALTH	Mission Pet Health	Cardinal	Media & Analytics AOR	US	Acadia	Y
 MIDAS	Midas	Barkley	Creative AOR	North America	Where Eagles Dare	Y
 NOVARTIS	Novartis	Merkly + Partners	Creative	Super Bowl Ad	Fallon	Y
 PAPA JOHN'S	Papa Johns	The Martin Agency	Creative AOR	Unk	Leo Chicago	Y
 pwc	PwC	None	Creative & Production	US	Ogilvy	Unk
 reckitt	Reckitt	Various agencies	Media Buying & Planning AOR	Europe	WPP Media	Unk
 STIHL	Stihl	Unk	Creative AOR	North America	The Martin Agency	Y
 SNAPCHAT	Snap Inc.	Unk	Creative AOR	International	New Engen	Y
 sonobello	Sono Bello	Unk	Digital Media AOR	US	dentsu x	Pilot Partnership
 MAGNUM ICE CREAM COMPANY	The Magnum Ice Cream Co	WPP Mindshare	Media AOR	Global	Publicis Groupe	Y
 TAKE 5 OIL CHANGE	Take 5 Oil Change	Various project-based agencies	Creative AOR	North America	Dagger	Y
		Various project-based agencies	Media AOR	North America	dentsu x	Y

Agency roster summary:

IP= Review in Progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	The Almond Board of California	Sterling-Rice Group (creative & media), Porter Novelli (PR)	Integrated AOR	Global	Grey New York	Y
	Tropical Smoothie Café	Unk	Creative AOR	US	Fallon	Y
	TJX	WPP Mindshare	Media AOR	US	Publicis Groupe	Y
	Vodafone	Various agencies	Creative AOR	Global	Publicis Groupe	Y

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

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