

Industry Update

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

March – April 2026 | Volume 87



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EXECUTIVE SUMMARY: March – April recap

The world feels unsteady. Tensions high across continents, alliances shifting, certainty fading. And while headlines capture global unrest, something transformative is also happening closer to home.

Our industry is being rewritten in real time. Advertising is no longer what it was. The agency model that once defined creativity and scale is searching for its next chapter—its next identity, its next source of meaning in a marketplace increasingly shaped by automation, algorithms, and AI.

Much of the conversation about AI is no longer about simply automating tasks. It's about rethinking and engineering how value is created across entire ecosystems and operational processes. Ad giants, like WPP, Publicis, and Omnicom, that once towered over the landscape are evolving, consolidating, and reinventing—or quietly struggling to keep pace.

For brand leaders, procurement teams, and those entrusted with managing agency partnerships, this is not a spectator moment. It is a strategic crossroads. Where is this heading? What will value look like tomorrow? And when the next model, platform, or “big shift” arrives, will we be positioned to shape it, or scrambling to catch it?

Change is no longer approaching. It's here. The only real question is whether we intend to react to it or lead it.



Bruno Gralpois
Co-Founder and Principal,
Agency Mania Solutions

A note from the AMS team:

So much is happening in the agency world that even reading our Industry Update's concise curation of the most relevant news and trends may seem daunting. So we are introducing a new content classification to help you focus on what matters most. Each piece of news and information is now labeled as being in one of three categories:

» GAME CHANGING

Transforms the landscape. Signals a structural shift, creates new rules, or materially alters strategy, economics, or behavior. Immediate attention warranted.

» HIGH IMPACT

Directly affects decisions, priorities, or performance. Meaningful implications for leaders and teams, even if not revolutionary. Act, adapt, or prepare.

» NOTABLE

Informative and relevant but limited in scope or duration. Worth knowing, monitoring, or referencing. Context, not urgency.

What's top of mind in our industry?

The word cloud reflects keywords in this Industry Update.



TALENT: Securing the right talent and resources



You are not hallucinating. AI is everywhere, from major investments made by agencies to the building of new capabilities to brands rethinking how they work internally and with agency partners. The section dedicated to AI continues to grow in size but also in strategic importance as brands consider how to evolve their martech stack and how to embed game-changing capabilities into their existing processes. Or should they? Native AI firms claim that we need to eliminate the old ways of doing things and rebuild from scratch. Incrementalism is dead. As the industry adopts AI and tech-driven innovation, creativity and content production, expected to be most disrupted by AI, are under incredible pressure. Agencies are at a crossroads, implementing new ways of working while putting creativity as a differentiating skill set at the center of what they do to capture consumer minds and hearts. A recent article by Seb Joseph, “The agency holdcos have an AI story, but not an AI business model,” caught my attention because it points to the extensive conversation about AI in the ad industry, which is often not aligned with operationally sound AI capabilities clients want to see. We need less talking and more walking.

» HIGH IMPACT

- **IBM** and WPP’s **Ogilvy** have ended a 32-year creative partnership, marking the conclusion of one of the longest-standing relationships in modern advertising. The decision was primarily commercial, cited as “balance-of-trade friction” between WPP and IBM (referring to the financial imbalance between the amount IBM paid for agency services and the amount WPP spent on IBM’s technology). Ogilvy was not fired; the agency chose not to participate in IBM’s creative RFP. The creative separation followed a similar move in December 2025, when WPP Media declined to participate in a review for IBM’s global media account.

» NOTABLE

- Per Mitch Caplan, **appraisals that drive performance** share three defining characteristics:
 - 1) They are data-driven, not opinion-driven (high-value appraisals integrate both quantitative and qualitative inputs)
 - 2) They deliver value to both sides (most effective appraisals are intentionally bidirectional)
 - 3) They are conducted consistently (one-off reviews generate insight; consistent reviews generate performance)
- **Lego** expanded its in-house programmatic media buying team with a larger team of experts such as programmatic media managers, programmatic media associates, and media planning associates in the United States and Denmark. Publicis One is expected to continue handling Lego’s global media account.

- **Dentsu Entertainment** formed a partnership with Iconic Arts, an entertainment and technology studio with offices in Los Angeles, Tokyo, and Latin America, in a move to build scalable, data-driven intellectual property for brands across content (including anime and serialized entertainment formats), experiences, interactive media, and consumer products. Iconic Arts has a proprietary data intelligence platform, IP-IQ, that’s designed to guide preproduction creative development, audience targeting, platform selection, and IP scalability.
- **Piscari** released its “**The Agency Reset 2026: Analysis and the case for change**,” aimed at CEOs of independent marketing agencies operating in digital, performance, content, and integrated marketing services. Per the author: AI, in-housing, procurement transformation, and rising client expectations are permanently eroding labor-based revenue, margins, and loyalty.
- Per **Vivaldi** and its “**The Real AI Advantage**” white paper, leaders in 2026 must:
 - 1) Map systems, not workflows
 - 2) Identify the feedback loops
 - 3) Redesign the interaction field
 - 4) Build AI across system boundaries
 - 5) Simplify interfaces to intent-based orchestration
 - 6) Implement instrument learning velocity
 - 7) Align incentives to ecosystem value creation
 - 8) Treat brand as system output, not messaging
- The Partnership Accelerator, a program by Ray Media Advisory, launched a series of 10-to-12 week “sprints” that involve stakeholder diagnostics, operational and performance assessments, joint working sessions, and a 90-day “accountability framework.” In a move to fix agency-client relationships before they break.
- Per MediaSense, new ways of looking at **pharma agency capabilities** include:
 - 1) Scientific craft specialists (medical communication agencies, boutique science shops) such as Cactus Life Sciences, Avalere Health, and inizio
 - 2) Brand-led health creative (omnichannel capable but not operationally industrialized) such as Area 23, ForHealth, and Havas Life
 - 3) Content supply chain integrators (facilitate scale, modular content systems, life-cycle efficiency) such as Accenture Song, Veeva Crossix, Indegene
 - 4) Integrated health networks (full stack global orchestration across med comms, creative, media, data) such as Omnicom Health, WPP Health Practice, and Publicis Health
 - 5) AI-platform centric (proprietary AI stack is the core differentiator, operating system over outputs) such as Eversana AI Agency, Supreme Group, and Viseven

New agencies or capabilities, restructurings, & reorganizations:

» GAME CHANGING.

- **WPP** restructured its operations into four main units—creative, production, media, and enterprise solutions—and set a new target of £500 million (\$678 million) in annual cost savings by 2028, coming mostly from cuts in finance and human resources, real estate, and disposing of underperforming or redundant assets. The holding firm is planning to reinvest these savings in growth areas such as AI and a new enterprise solutions unit that will combine data platforms and customer management tools for its clients. As part of the restructuring, creative agencies (VML, Ogilvy, Burson, AKQA, Landor, Design Bridge and Partners, and Grey) are being placed under a structure called WPP Creative, similar to prior consolidations in production (WPP Production) and media (WPP Media). Under this WPP Creative concept, creative agencies will have a single P&L, but the agencies will remain distinct, client-facing businesses and be accountable for their own businesses within that P&L. The firm is also investing in principal-based media buying.


» HIGH IMPACT

- **Publicis** launched a new influencer offering called Influential Sports, a joint effort from Publicis Sports and Influential, the influencer marketing firm the holding company acquired for \$500M. Designed to help brands connect with sports fans at scale, the team will combine creators and influencers with fan intelligence via ID and data capabilities from Epsilon with sponsorship and activation services.

- Independent media agency **Horizon Media** implemented a companywide restructuring to focus on AI development and skill optimization effort (mostly in data, technology, AI, product innovation, and integrated capabilities), which resulted in layoffs across departments (2.5% of its workforce) but also new hiring. The agency is investing in its HorizonOS, a central hub integrating AI, data analytics, and external tech partners.

» NOTABLE

- **Cheil Worldwide** has broadened the scope of its US agency network by expanding McKinney into consumer public relations, signaling a deeper commitment to integrated brand storytelling and earned-first communications. The expansion reflects a broader industry shift in which brands are demanding unified campaigns that seamlessly blend paid, owned, and earned media. By embedding consumer PR capabilities directly within McKinney, Cheil positions the agency to deliver fully integrated programs, from creative concept through cultural amplification.
- **Uncommon Creative Studio** unveiled a dedicated PR, culture, and influence practice, designed to turn creative ideas into cultural movements, not just campaigns. The move reflects a powerful industry truth: Brands don't just compete for impressions anymore. They compete for attention, relevance, and belief. By formalizing a PR and influence capability, Uncommon is building a model where earned media, creator ecosystems, and cultural strategy are embedded from day one of the creative process.
- Creative agency **Proud Robinson + Partners** launched its experiential arm, Renaissance, to deliver brand experiences.



Benchmarking, Reinvented

From cost control to clarity, alignment to stronger partnerships

agencymania.com

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

- The newly formed agency **JK** officially launched, with global technology leader Hitachi as its founding client. The agency is rooted in three global hubs: London, New York, and Los Angeles. At the heart of JK's model is the premise of compressing traditional, months-long marketing and communications planning cycles into just days. It's a response to one of the industry's most persistent bottlenecks, which are slow decision-making, layered approvals, and bloated planning processes that dilute momentum before execution even begins.
- Brand consultancy **Immediate** (part of Burda International, the global arm of Hubert Burda Media) launched iX, an experiential agency designed to produce consumer-brand moments in real time, utilizing proprietary data and consumer insights to identify specific audience segments and trends.
- **Dentsu** launched a new healthcare audience targeting platform, Pathwai, that enables it to design, activate, and measure consumer, caregiver, and professional audiences based on historical results from anonymized health records (e.g., pre-diagnosis, diagnoses, prescription fills, procedures). AI martech firm BranchLab developed the platform.
- New agency **Good Company** launched, offering integrated creative, media, digital, social, strategy, experiential, and creator amplification. The agency, which favors agility and high impact as its core fundamentals, leverages its AI Creative lab, dubbed Little Debbie, which acts as an extension of creative to aid visual and tech workflows in real time.
- The **Association of American Advertising Agencies (4As)** issued a Venn diagram indicating where technology and creativity overlap—agencies as either marketing purveyors/resellers/SaaS providers (with a focus on scalable IP, automation, and performance) or agencies as strategic partners (with a focus on advisory expertise, creativity, and cultural intelligence). The intersection: a blend of tech capability and strategic humanity. Many agencies will lean toward one future or the other, depending on factors such as scale, capital access, talent mix, and client needs.
- Media planning and buying agency **Mediaspace Solutions** launched Mediaspace Health, a specialized division targeting agencies, brands, and pharma. Mediaspace Health partners with healthcare-focused agencies to provide specialized media expertise.
- Per **Anthropic's** labor report, 65% of the tasks performed by marketing professionals are eventually replaceable with AI operations. Per Mark Ritson, four reasons contributed to this high vulnerability:
 - 1) Marketing work is unusually language heavy (strategies, briefs, reports, etc.)
 - 2) It has enough structure to be codifiable and enough ambiguity to reward probabilistic pattern-matching
 - 3) Marketing functions have been chronically under-resourced for years
 - 4) The marketing profession has little to no formal training
- **Amazon** announced a staggering \$200 billion investment in AI-related capital expenditures, edging past Google's reported \$175 billion commitment, while chasing infrastructure supremacy including massive expansion of data centers worldwide, custom silicon development, scaling generative AI capabilities across AWS, AI integration deep into logistics, retail personalization, robotics, and voice interfaces and enterprise-grade AI platforms competing directly with Google Cloud and Microsoft Azure.
- Per **Gartner**, half of agencies' proprietary AI platforms will either wind down or become obsolete by 2029 due to the competition with open-source AI platforms developed by large tech players OpenAI, Amazon, Meta, and Google. Gartner expects open-source platforms to support more than 75% of enterprise AI deployments by 2028 due to costs and customization.
- Agencies are integrating **IAB Tech Lab's** agentic protocols into their operating system, building models to translate the know-how of human media buyers into AI agents that can operate across platforms and make ad-buying decisions. IAB Tech Lab's Agent Registry is a catalog of automated ad tech services provided by Google, Amazon, PubMatic, Equativ, and others. With this approach, AI agents representing buyers, sellers, or platforms can discover one another, exchange data, and coordinate tasks.

» HIGH IMPACT

- **WPP** and **Adobe** expanded their global partnership by creating a new agentic-based marketing solution and a joint transformation practice helping clients redesign their marketing operations and embed the new capabilities into their organizations. Adobe Firefly Foundry, used for developing generative AI models, will be integrated into WPP Open.
- **Microsoft** and **Publicis Groupe** expanded their partnership to build a full-stack marketing platform that integrates software systems (Microsoft 365, Copilot, and Microsoft Azure), AI agents and identity-based data (using Epsilon). Both companies will leverage their expertise to integrate agentic AI across the entire flow of work, "so marketers can focus on strategy, creative and original ideas, rather than writing code and infrastructure." As part of the move, Sapien AI will integrate Microsoft Copilot Studio, Microsoft Agent 365, and Microsoft IQ.

AI (Artificial Intelligence):

» GAME CHANGING

- Per Axios, **OpenAI** expects to earn \$2.5 billion in advertising revenue in 2026 and \$100 billion by 2030 in a move to grab a portion of the global digital advertising market (currently led by Google and Meta) and capitalize on an estimated 2.75 billion users by 2030. OpenAI plans for ad revenue to rise to \$11 billion in 2027, \$25 billion in 2028, and \$53 billion in 2029.

- Per the WFA, 3 out of 4 **marketing procurement** teams lack KPIs to monitor AI/GenAI impact, as they are still at an early stage of deployment. 7 in 10 report that AI/GenAI has changed their conversations with agencies, with discussions about productivity becoming increasingly common. 34% have begun adapting their agency remuneration models, with a further 57% planning to do so.
- The ANA Martech Leadership Council issued a report on “**AI Agents in the MarTech Stack**,” identifying eight use cases:
 - 1) Campaign planning and audience intelligence agents (to reduce friction in campaign planning, democratize access to the tools in the stack, and increase workflow efficiency)
 - 2) Briefing and workflow standardization agents (for process acceleration, consistency, and internal productivity gains)
 - 3) Creative content supply chain agents (for speed, creative velocity, global scaling, and brand consistency with guardrails)
 - 4) Vendor-agnostic orchestration and digital twins (for long-term flexibility, cost control, and scalable internal capability building)
 - 5) Governance and compliance agents (for risk mitigation, regulatory efficiency, and friction reduction in financial services marketing)
 - 6) Consumer-facing service agents (to enhance customer experience and operational efficiency)
 - 7) Lead scoring and predictive intelligence (to improve B2B lead qualification precision, and data-driven sales alignment)
 - 8) Analytics and clean room interface agents (for data democratization and analytic speed in media operations)
- Digital agency **Dept** partnered with Adobe to rebuild how its 500-person global content studio operates by leveraging Adobe’s enterprise software, including GenStudio, Workfront, and Frame.io, and integrating Firefly’s AI tools to automate parts of the production and content review process. Dept also layered in its proprietary systems, including its Lightspeed engine and automated quality checks, to support large-scale content creation across the globe.
- A new agentic AI platform by US-based **Seedtag**, dubbed Liz, launched to help brands and agencies plan and activate media campaigns using a “neuro-contextual intelligence” technology. It runs through a conversational interface, with text and voice, that acts as an assistant. The agent builds a full campaign, including custom audiences, from mapping data, real-time insights, and competitive data. It scans web content in real time, processing millions of signals from publishers, and generates performance metrics and reports.

Noteworthy quotes:

- » “No doubt, AI is going to revolutionize everything we do but so far it is difficult to scale, expensive to put in place and fails to deliver measurable value in 95% of cases.” —Arthur Sadoun, CEO, **Publicis Group**
- » “Let’s not forget that the holding companies have focused on reducing costs for over 20 years in order to shore up share prices and margins. They’ve done this instead of learning how to improve client brand performance and price their agency services for the work they do.” —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » “AI destroys the old adage ‘Fast, cheap, or good—pick any two.’ Artificial intelligence allows us to do all three.” —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » “There’s a group called WPP Creative, but that’s 100% not meant to be an agency. It’s meant to be an operating system. This is not a merger [of WPP agencies]. We’re not killing brands.” —Jon Cook, CEO, **VML**
- » “We are not an AI platform, and we shouldn’t compete with those investing trillions into data and new technology. We should be the [business] that can help our clients connect the entire ecosystem: across data, technology, the right AI, and the right people.” —Arthur Sadoun, CEO, **Publicis Groupe**

» NOTABLE

- **Stagwell** launched its AI-powered search platform, dubbed Stagwell Search+. Built by Stagwell’s Assembly media services unit in conjunction with AI “visibility” platform Emberos, Stagwell Search+ combines an agentic platform that improves a brand’s discoverability, visibility, sentiment, and outcomes in AI search, as well as continuous, ongoing measurement, experimentation, and learning.
- Luma AI announced **The Luma Dream Brief** (lumadreambrief.com), a global creative competition inviting advertising creatives to bring their best unmade ideas to life. A grand prize of \$1 million will be awarded to creative work using Luma AI that wins a 2026 Cannes Lions Gold Lion. The commercial must be at least 70% AI-generated using Luma AI.

- » “Agentic workflows will become the norm, daisy-chaining AI agents to seamlessly go from social media trend to campaign idea, to finished creative, to live optimization—at infinite scale.” —David Jones, CEO and Founder, **The BrandTech Group**
- » “What an agency provides that is not tech-dependent—meaning cannot be as easily commoditized—is that outside-in perspective on a client’s business.” —Jay Wilson, VP Analyst, **Gartner**
- » “We’re moving to a single company model with four operating units.” —Cindy Rose, CEO, **WPP**

- » “Almost all the focus and all the noise [around AI] is about efficiency—and maybe a bit about effectiveness—but there’s very little about real value creation.” —Paul Frampton-Calero, CEO, **Goodway Group**
- » “It’s less about who the agency is and more about who the people are who are embedded and driving your business every day—and whether they understand your strategy and believe in what they’re trying to do.” —Arianna Orpello, Chief Marketing Officer, **Geico**

Turn **brand storytelling** into a strategic capability.

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REPORT

The Year of Entertainment

Contributed by: Blum Consulting Partners

Recently, there’s been growing conversation at brands around the power of storytelling to connect with audiences.

Gap created the role of Chief Entertainment Officer and hired Pam Kaufman, formerly Paramount to build a “fashiontainment” platform across film, TV, music, gaming, licensing.

Mattel was one of the earliest and most successful ‘brand as studio’ models with the hit Barbie. Robbie Brenner was hired to turn IP into film / TV franchises.

Geoff Cottrill took on the role as Chief Brand and Games Officer at Topgolf to blend gaming, entertainment and brand storytelling.

These are just three examples of brands treating entertainment not as a campaign tactic, but as a long-term capability.

According to Blum Consulting Partners, marketing as we know it is being replaced and most organizations aren’t built for what comes next.

What ultimately determines whether marketing can succeed in the entertainment space isn’t just about who you hire, it’s about the infrastructure that supports it. The operating model. The team design. The workflows and partnerships that allow entertainment thinking to scale without breaking the broader marketing ecosystem.

This is the first of a regular series on the state of entertainment in the marketing industry.

To read more, [click here](#).

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



Super Bowl creative trends featured humor after years of caution, heavy celebrity density, and emotional storytelling from legacy brands. Super Bowl LX scored 125 million viewers for NBCUniversal (on NBC, Peacock, Telemundo, NBC Sports Digital, and NFL+), becoming the second-most-watched Super Bowl ever. Puerto Rican singer Bad Bunny may have been a contributing factor. According to Ripple Analytics, social consumption (inclusive of fans, owned platforms, broadcast partners, influencers, etc.) of the halftime show set a record of 4 billion views after the first 24 hours, up 137% YOY. A “handful” of 30-second Super Bowl ads sold for \$10 million or more. Budweiser topped the USA Today Ad Meter for the second year with its 60-second spot, “American Icons.”

» HIGH IMPACT

• Per the ANA’s “State of Marketing Measurement Report,”

- 1) Measurement is modernizing but still fragmented
- 2) ROI credibility matters more than convenience
- 3) Data accessibility, speed, and integration are the new table stakes

Top 2 measurement challenges:

- 1) Measuring all channels together to compare performance and optimize
- 2) Using different metrics/KPIs for different platforms

Key recommendations:

- 1) Anchor measurement to business outcomes and not media metrics
- 2) Design for cross-channel reality
- 3) Shift from reporting to testing
- 4) Build a privacy-resilient measurement stack now
- 5) Use AI to accelerate insights but not to replace judgment
- 6) Invest in people and operating models

» NOTABLE

- **Super Bowl LX (2026) by the numbers:** 60 commercials where culture, capital, and creativity merged. Roughly 25-30% of all advertisers were technology, AI, SaaS, fintech, or crypto brands. 20+ brands came from CPG and beverages. Food and beverage brands leaned heavily into nostalgia, celebrity cameos, humor, and shared cultural rituals. Other categories included health & pharma, sports betting and fintech, and auto & mobility. Estimated price for a 30-second spot: \$7M-\$8M+. With production and celebrity talent: total investments often exceeded \$15M-\$25M per campaign. Combined media outlay likely surpassed \$500M+ among all advertisers. 23% of Super Bowl ads mentioned AI, per iSpot.
- **Adobe** added new capabilities to its enterprise marketing work-management platform, Adobe Workfront, to help agencies plan and collaborate on their client work. The capabilities include a Rate Cards tool for tracking costs and related programs for real-time budget adjustments, scheduling assets like studio space, and aligning resources with contract and retainers.

- Per **Kantar’s Super Bowl LX Creative Analysis**, which rated ads based on the following: Brand equity (alignment of the ad to a brand’s meaningful difference), Meaningful (how well the ad creates an emotional connection to the brand and showcases the functional needs it meets), Different (how well the ad presents brand differentiators and how it stands out and sets trends), Enjoyment (enjoyability of the creative), and Impact (ability of the ad to create a branded memory). Super Bowl advertising has performed better each year, and has been 25x more effective than a typical TV ad at driving brand perceptions. 57% of ads leveraged humor in 2026, and per the data, “the bigger the laugh, the better the ad performance.” AI powered new applications for websites, apps, and augmented reality, but data shows that GenAI ads aren’t as strong as ads not using AI. Svedka’s ad made by AI, “Shake Your Bots Off,” scored just 32 on branding. The study concluded that cross-channel synergy is important for campaign effectiveness pre- and post-game.
- Payroll platform **Deel** produced a 30-second ad, “Dreaming of Deeling,” with its agency independent SuperBloom House, leveraging AI tools like Runway, Pika, and Luma via Krea AI. The ad features AI-generated actors.
- Per **ID Comms**, three pragmatic actions for an agency review:
 - 1) Be forensic about what you are really asking for (map your own operating model; determine where your in-house media capabilities are strong or weak)
 - 2) Be brave enough to let challengers challenge you
 - 3) Interrogate the operating system, not just the showreel (understand what sits under the hood, figure out how data moves, and how AI is implemented)

Awards:

- Key highlights from the **Top 5 Super Bowl LX TV ads per Ad Age:**
 - 1) Anthropic – “Can I Get a Six-Pack Quickly?” (agency: Mother)
 - 2) Squarespace – “Unavailable” (in-house)
 - 3) Coinbase – “Everybody Coinbase” (Coinbase Creative Studio and Isle of Any)
 - 4) Dunkin’ – “Good Will Dunkin’” (Artists Equity)
 - 5) Levi Strauss & Co. – “Backstory” (TBWA\Chiat\Day)

Overall trends in Super Bowl ads: sharper, stranger comedy, less cliché, more conviction.
- **Budweiser** won USA Today’s Super Bowl Ad Meter for the second year in a row with a 4-ad score. The 60-second spot was produced by BBDO New York and showed a Clydesdale helping a rescued eaglet grow up and achieve flight. Lay’s ad, “Last Harvest,” ranked second, followed by Pepsi’s polar-bear-inclusive “The Choice,” Dunkin’s ’90s-era-sitcom reunion “Good Will Dunkin’,” and Michelob Ultra’s ski-focused “The Ultra Instructor.”

- **Super Clio winner** for the most creative Super Bowl commercial was Anthropic's Claude AI's 60-second ad produced by Mother. Other shortlist winners included Xfinity's Jurassic-park-themed spot from Goodby Silverstein & Partners and Levi's "Backstory" by TBWA\Chiat\Day LA.
- Per **Ad Age, top agencies (A-list)** of 2026:

1) Rethink	6) Wieden+Kennedy
2) Mischief @ No Fixed Address	7) Known
3) Highdive	8) Innocean USA
4) Tombras	9) Goodby Silverstein & Partners
5) Code and Theory	10) BBH USA

Agency standouts:

1) Callen	9) Preacher
2) Chemistry	10) Silverside
3) The Community	11) Terri & Sandy
4) Fundamentalco	12) Virtue
5) GSD&M	13) VML
6) Invisible Dynamics	14) Walton Isaacson
7) Mirimar	15) WorkInProgress
8) Mod Op	16) Zulu Alpha Kilo NY

Other notables include:

 - 1) Agency to watch: R/GA
 - 2) Agency network of the year: Droga5
 - 3) B2B agency of the year: Park & Battery
 - 4) Business transformation agency of the year: Collins
 - 5) Creative agency of the year: Isle of Any
 - 6) Design and branding agency of the year
 - 7) Uncommon Creative Studio
 - 8) Experiential agency of the year: Momentum Worldwide
 - 9) In-house agency of the year: Instacart's Local Produce
 - 10) Independent agency of the year: Special US
 - 11) Independent agency network of the year: Mother
 - 12) International agency of the year: Isla Republica
 - 13) Media agency of the year: Acadia
 - 14) Multicultural agency of the year: UWG Inc
 - 15) Performance marketing agency of the year: NP Digital
 - 16) PR agency of the year: Weber Shandwick Collective
 - 17) Social media/influencer agency of the year: Billion Dollar Boy
 - 18) Sports/entertainment agency of the year: 72andSunny
- Per **Ad Age, top production companies of 2026:**

1) Biscuit Filmworks	6) Love Song
2) MJZ	7) Somesuch
3) Smuggler	8) Revolver
4) Hungryman	9) Canada
5) Iconoclast	10) Epoch Films
- Five Omnicom agencies were named **Fast Company's Most Innovative Companies 2026**: Four were recognized on the Advertising & Marketing list, more than any other holding company. Additionally, Weber Shandwick ranked #2 on the Public Relations and Brand Strategies list. WARC also named Omnicom the #1 holding company for effectiveness in its Effective 100 ranking, which recognizes the world's most awarded campaigns and companies for delivering tangible business impact.
- Per **The Great Pitch Company**, eight new agencies to watch in 2026:

1) 05:37	5) feral
2) Ace of Hearts	6) Small Family Business
3) Baby Teeth	7) LePub
4) Block Report	8) Piquiq B Corp™

Noteworthy quotes:

- » "AI is the final nail in the coffin of hourly billing. Agencies simply cannot capture the value of AI using time-based billing, otherwise agencies will have to start billing by the nano-second. AI, and new technologies in general, compel agencies to price solutions instead of time." —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » "For agencies, the 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, but only if agencies know what's in the scopes are they in a position to do something about it. Agencies need to use SOW documentation and measurement tools to solve this problem." —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » "Sustainable marketing will have to shift from abstract ambition to practical relevance in response." —Jenny Bust, Strategic Client Partner, **Anthesis Group**
- » "At the end of the day, and especially in advertising, we're always mining for the tensions, because that is where cut-through insight lives." —Spencer LaVallee, Co-Founder and Creative Director, **Gus**
- » "Because agencies are paid for their time rather than their results, they have entirely lost their skin in the game. When you remove the senior talent, compress the timelines, and manage the creative process via procurement spreadsheets, you no longer produce culture-shifting ideas: you produce 'assets.'" —Roy Sutherland, Vice Chairman, **Ogilvy UK**
- » "Predictability has become a luxury. And when it runs out, precision is what's left." —Thomas Bailly, Head of Growth, **Readpeak**
- » "Media Management is the advertiser's responsibility. Not the media agency's. Media agencies recommend. Media agencies execute. Media agencies optimize. But advertisers must govern." —Philippe Dominois, CEO, **Abintus**

FINANCIALS: Driving efficient use of resources



Fueled by the growth of digital businesses and the acquisition of new customers, Walmart hit the \$1 trillion market cap, joining an exclusive club made up almost entirely of technology companies.

» GAME CHANGING.

- **WPP** announced the firm is moving from a traditional time-based compensation model to an outcome-based model, tying fees to measurable business results such as sales and brand performance. WPP stated that AI and measurement tech made the model viable, allowing the firm to link first-party data, media signals, and sales outcomes in a closed loop.
- Following its first earnings report since its acquisition of Interpublic, **Omnicom** reported \$5.5 billion in revenue but a net loss of \$941 million in the fourth quarter 2025. It also doubled its cost-synergy target to \$1.5 billion (\$1 billion in labor cost reductions, including more offshoring; \$240 million from real estate consolidation; \$260 million from general, IT and procurement efficiencies; and additional savings from automation and AI), including \$900 million in 2026. Omnicom plans to exit some smaller markets and non-strategic businesses. It also authorized a \$5 billion buyback, including a \$2.5 billion accelerated share repurchase. Full-year revenue for the newly merged entity was \$17.3 billion with a net loss of \$54.5 million. Omnicom's expanded media operations constitute about 55% of the company's revenues.

» HIGH IMPACT

- Per MoffettNathanson, Alphabet-owned company **YouTube** now ranks as the world's largest video media company in terms of ad revenue (with \$62 billion in total revenue and \$40.4 billion in advertising revenue), surpassing Disney, Paramount, NBC, and Warner Bros. Discovery in 2025.
- Per Mediasense, Publicis Groupe won twice as many **new business pitches** as WPP or Omnicom in 2025 with 56% of all global billings from new business opportunities and 1,458 out of 3,885 pitches. WPP was second with 672 wins and Omnicom with 656 wins. Dentsu landed 745 wins but those were relatively small compared to WPP and Omnicom. In 2025, \$2 billion in media was at play globally among the eight largest holding companies.
- **Bolloré Group** took majority control of **Havas** with a 52% (vs. original 30.2%) stake of the company through a combination of Bolloré investment entity Compagnie de l'Etoile des Mers getting 19% of the outstanding shares of Havas and the remaining through Havas CEO Yannick Bolloré.
- Omnicom and Publicis Groupe commissioned a third-party audit of **The Trade Desk** to confirm if the demand-side platform charged hidden advertising fees.
- Per the ANA, the share of total media budgets being bought by **principal media arrangements** remains unchanged at 55% for the last two years. While TV remains the dominant media bought via principal media arrangements (74%, up from 70% in 2024), digital dropped to 43% currently from 68% two years ago.

- Per Ciesco, 2,308 **media and marketing M&A/ transactions** were completed in 2025—a 12.6% decline YOY but about 17% above 2020 levels, reinforcing M&A as an embedded growth lever across the sector. Disclosed value (excluding megadeals) increased to \$91.1 billion, up 61.8% YOY, driven by the reemergence of large-scale transactions (Omnicom's \$15.9 billion acquisition of IPG and Silver Lake's \$13 billion acquisition of Endeavor Group) at the top end of the market. Strategic buyers accounted for 69% of transactions, with private equity at 31%. Most-active buyers by deal volume were Havas (13), Gray (12), Publicis Groupe (10), Bridgepoint (9), and Providence (8).

» NOTABLE

- **Disney Advertising** successfully sold out its ad inventory for the 98th Oscars with 18 sponsors returning and 24 new sponsors, and extended its offering into a multiday and multiplatform approach.
- Payment fraud prevention platform **Trustpair** launched new global account validation capabilities to help procurement and financial teams secure their entire P2P process. The move intends to further increase security and efficiency of financial departments by automating the high-risk, manual "detective work" that finance teams currently perform to verify vendor bank accounts.
- Per the ANA and its "Influencer Marketing Agency Compensation" report, 30% of **influencer marketing spending** is being paid to agencies compared with 70% to influencers themselves. 61% of advertisers use compensation models that are either explicitly nontransparent or unknown to pay agencies for managing their influencer marketing campaigns.
- **Acadia** announced that the firm is returning rebates it negotiated to 53 clients whose media spending qualified them to receive one, which can vary from approximately 2% to 20% of media spend (based on the type of media assets). The firm has been advocating for greater transparency and education about the topic of media rebates via its site itsyourrebate.com.
- Per eMarketer, **US podcast ad spending** is expected to increase by nearly \$1 billion annually by 2029. 65% of marketers intend to spend more on digital audio, with 67% already including it in their media mix. Nearly half (46%) of advertisers commit between 1% and 10% of their ad budgets to digital audio while 21% invest between 11% and 20%.

Mergers & acquisitions (M&A) activity:

» HIGH IMPACT

- **Publicis Groupe** acquired global sports and entertainment agency 160over90 from VME Group to strengthen its capabilities ahead of the FIFA World Cup. The move will combine 160over90's scale and expertise in sports experiences, culture, and talent (estimated to be a \$150 billion sports media market) with its connected influencer platform, experiential capabilities, and data-driven insights. The deal, valued at around \$600 million, brings in more than 670 employees who will join the newly created Publicis Sports division.

» NOTABLE

- **Publicis Groupe** acquired Israel-based predictive creative analytics and content optimizer platform AdgeAI to strengthen the firm's ability to help clients quickly and accurately identify patterns that correlate directly with performance outcomes. The offering will be fully integrated into Publicis Production to give clients real-time measurement and predictive performance insights.
- Entertainment agency network **Terry Hines & Associates** acquired content company MDRN Logic in a move to expand Terry Hines' capabilities as a marketing agency by offering clients additional creative and design tools. MDRN Logic joins other agencies within Terry Hines, such as digital/social agency Homebrew, OOH company THACreate, and event/experiential shop The MRKT.
- **Residence**, the global network of creative companies, acquired strategic and social creative agency OK COOL and its offices in New York and Sydney in a move to expand the agency's global scope, especially in fashion, retail, travel, tech, and food.
- Stagwell-owned agencies **Doner** and **Colle McVoy** are merging to become DonerColle Partners, a strategic alliance that combines their leadership teams, capabilities, and back offices while allowing them to maintain individual brands, clients, and P&Ls.
- Atlanta-based marketing agency **Alloy** acquired creative and digital agency Look Listen in a move to strengthen the firm's creative and experience practices. Look Listen specialties include brand strategy, UX/UI, and video production (for clients such as Atlanta United, Equifax, Oracle, Prudential, and Ameris Bank).
- **Havas** took a majority stake in Stockholm-based Ctrl Digital, a consultancy specializing in digital analytics, measurement, and data activation, which will become part of the Havas Media Network's global technology, data, and analytics practice, as part of its expansion into Sweden and the Nordics.
- **Havas** acquired Eyesight, a specialist in the production of fashion shows and other luxury marketing events, in a move to strengthen the group's ability to create experiences with exceptional standards while supporting the development of their Maison in Paris, New York, and Shanghai. The agency is now part of Havas luxury network Maison BETC.
- **Havas** acquired German-based digital agency Styleheads in a move to enhance its digital capabilities, cultural insights, and creative strategies and expand its service offerings in Germany within the Havas Play Network.
- Toronto-based marketing and commerce agency **Salt XC** acquired New York-based media agency Craft & Commerce in a move to empower brands to connect with consumers by marrying real-world experiences with data-driven media buying and measurement. It is part of a strategy to expand the agency's US footprint to New York, Chicago, and Orlando.
- **Belk** acquired Greensboro, North Carolina-based marketing agency Sales Factory, which provides services including research, branding, strategy, creative, content development, digital, and e-commerce. The agency will continue to operate under the Sales Factory name.
- **New Engen** acquired Grapevine.AI, a creator-powered network that helps brands activate at scale through whitelisted paid social campaigns in a move to expand New Engen's existing creator-focused performance capabilities within its broader digital-marketing offerings.
- AI-powered hotel CRM and digital sales software **ReGuest** acquired Rugby, UK-based UP Hotel Agency to enhance its offerings in hotel marketing and in the hospitality sector. The hotel and hospitality agency provides website design, development, and digital marketing services.
- **Levy**, the sports, entertainment, and events division of Compass Group UK & Ireland, acquired sports marketing agency The iLUKA Collective to enhance Levy's capabilities in providing comprehensive event services that connect events and venues.

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- **Onetag**, a global ad exchange, curation platform, and demand-side platform, acquired Aryel, an Italian creative ad tech startup, to expand the firm's access to advanced tools for optimizing and testing interactive ad creatives.
- **Atoms & Space** acquired Launchvox, a digital innovation agency, to expand the firm's offering as a creative-tech specialist supporting experiential, social, and product marketing. Launchvox has expertise in XR, 3D animation, and interactive platforms.
- **Graybox** acquired Good & Gold, a brand-first creative and digital marketing agency, in a move to combine its performance-driven growth expertise with the creative leadership of Good & Gold.
- Worcester, UK-based creative communications agency **DRP Group** acquired video production company Liguona to strengthen its global film and animation offering. The production company offers services including live action, animation, virtual reality, 3D photorealistic renders, and broadcast content.
- **OneMagnify**, a leader in AI-enabled marketing solutions, acquired the performance marketing business of Optimal, a digital marketing partner known for its expertise in performance media and audience data solutions. The acquisition aims to integrate Optimal's performance media expertise with OneMagnify's AI-powered platform and analytics capabilities.
- **Hovercraft Ventures**, a global experience and innovation venture platform, acquired Santa Cruz, California-based Visual Endeavors, a design and creative solutions agency known for its innovative projects in the entertainment sector. The firm says it blends technologies with artistic vision, providing immersive experiences across various industries such as live entertainment, corporate activations, and immersive art installations.
- **Colony Group** acquired Type + Pixel, a prominent brand experience innovation agency, to strengthen its fully integrated agency model while broadening its national footprint, joining other prior acquired agencies including Creative Outpost, Orange Digital, and Colony Agency. Type + Pixel is renowned for its expertise in brand innovation and AI-driven creativity.
- LA-based investment firm **Shamrock Capital** acquired Mutiny, a creative agency specializing in connecting brands with gaming audiences. Mutiny assists brands by combining player-first content, social strategies, and community engagement.
- Ireland's largest independent digital agency, **Granite**, acquired performance marketing agency Creative Media to accelerate the firm's expansion plans in North America and offer an alternative to holding company agencies for US clients seeking digital transformation, performance marketing, and AI-powered solutions.
- Social commerce agencies Orca and Sapphire Studios have merged to form a new entity called **Third** with offices in Los Angeles, Chicago, Minneapolis, Mexico City, and London. Los Angeles and Mexico City will serve as Third's primary studio and production hubs. The new entity offers integrated social commerce services spanning platform strategy, shoppable livestreams, social commerce operations, creator and affiliate commerce, and creative.
- San Diego independent agency **CourtAvenue** acquired data consultant GTX Solutions in a move to expand the firm's offering in customer data strategy and implementation and customer experience optimization.
- **EagleTree Capital** acquired experiential marketing agency The Opus Group, which comprises three agencies: Opus Agency, MAS, and Verve with offices in US EMEA and APAC, and clients that include Amazon, BMW, Diageo, Google, and Salesforce.
- Ad tech company **Smartly** acquired Incrmntal, an AI-generated marketing measurement platform that offers real-time metrics for ad campaigns across mobile, web, TV, CTV, influencers, OOH, audio, and podcasts. The move intends to help brands and agencies better allocate media planning and budgets to enhance campaign outcomes.
- Independent global agency **Podean** acquired Amerge, a full-service global Amazon Ads Advanced Partner that offers demand-side platforms and streaming video services, in a move to support brands expanding internationally.

Noteworthy quotes:

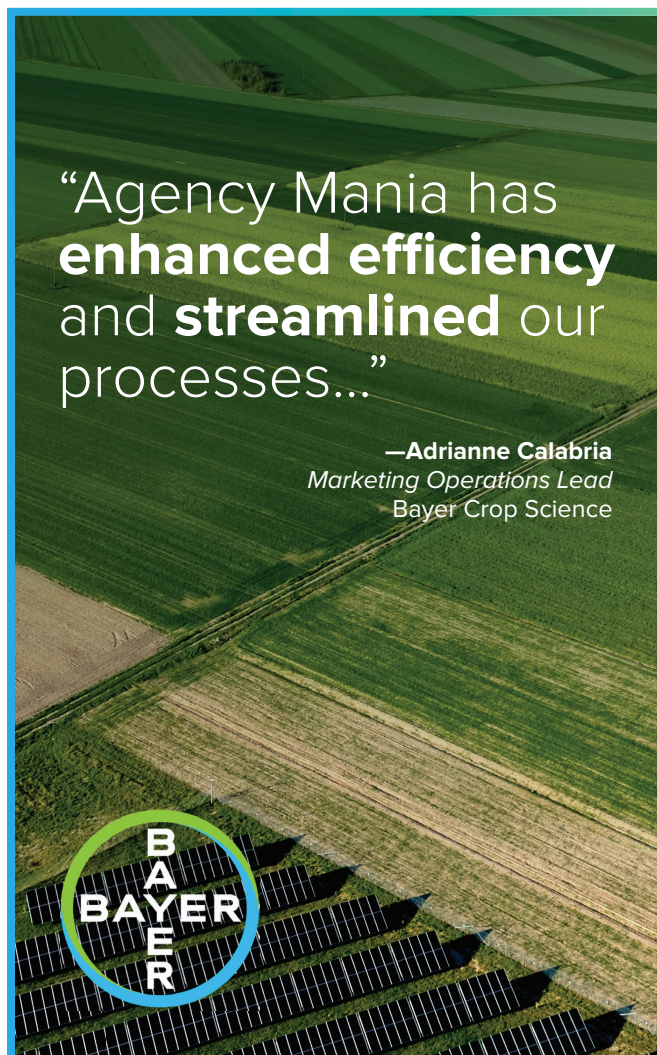
- » "Don't get excited about the restructuring of WPP and Omnicom, folks. Their cost-reduction strategies have not changed. The new structures just make it easier for them to do it." —Michael Farmer, Chairman and CEO, **Farmer & Company**
- » "Our FY25 numbers came in this week, and the one I keep coming back to is \$476 million in net new business over the last twelve months, \$106 million in Q4 alone. That's a lot of yeses." —Ryan Linder, EVP, Global Chief Marketing Officer, **Stagwell**
- » "It's extraordinary but clients don't move fast enough. So it's not about technology, it's about change management and it's also about simplifying workflow." —Martin Sorrell, Founder and Executive Chairman, **S4 Capital**
- » "Principal/inventory media usage continues to grow, as the 'agent' role changes into full-service execution." —Ruben Schreurs, Group CEO, **Ebiquity**
- » "Enlightened procurement professionals are beginning to understand that hourly billing simply doesn't comport with AI-powered business models in which machines are performing tasks in a fraction of the time required for humans to do the same job." —Tim Williams, Founding Partner, **Ignition Consulting Group**
- » "I think the whole sector is being undervalued, and we're double undervalued. There's nothing worse than a good house in a bad neighborhood." —Mark Penn, Chairman and CEO, **Stagwell**
- » "Holding companies WPP, Omnicom (and IPG) milked their agencies rather than help them become more effective for clients. The price: stagnant client brands, falling fees and short-term relationships." —Michael Farmer, Chairman and CEO, **Farmer & Company**

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.

- **American Honda Motor Co.** selected RPA as its creative AOR for the Acura brand, a longtime agency for the Honda brand and its media partner for both Honda and Acura, without a formal review. Incumbent MullenLowe, which was part of Interpublic Group of Cos., held the Acura creative account since 2013 and through last November.
- Air conditioning, heating and plumbing services firm **American Residential Services (ARS)** selected Horizon Next as its media AOR. The agency will handle all media duties, including strategy, planning, activation, and measurements, across local video, audio, and out-of-home for ARS's 25 brands.
- **American Tire Distributors** selected Atlanta-based Ammunition (part of Worldwide Partners) as its integrated AOR following a review. The agency will handle brand strategy, creative, dealer and tire brand partner experience, loyalty, digital, and CRM/personalization for its 110 distribution centers and 80,000 customers nationwide.
- Gaming brand **Betway** selected M+C Saatchi Sport & Entertainment as its integrated AOR following a review. The agency will handle advertising, communications, sponsorship activation, content creation, and fan engagement for Arsenal FC, Atlassian Williams F1, Manchester City, and the Springboks, among others.
- Atlanta-based national fast-casual pizza chain **Blaze Pizza** selected Bloom Ads Global Media Group as its media AOR following a review. The agency will handle all media planning and buying duties on behalf of the 300 restaurants in 36 states and three countries.
- **Bristol Myers Squibb** kicked off a review of its media account. Incumbent IPG Mediabrands (now part of the Omnicom Media platform) in the US is expected to defend.
- **Burger King** selected Mojo Supermarket as its social media AOR and Praytell as its PR AOR for the US and are expected to collaborate. Mojo Supermarket will handle always-on social strategy, including creative, community engagement, and activations. Praytell will handle earned media, managing influencer relationships, and identifying relevant cultural stories.
- Turkey company **Butterball** selected Omnicom-owned Carmichael Lynch as its new integrated AOR following a review. The agency will handle media planning and buying, creative, and social media for the entire company's portfolio.
- Design-software developer **Canva** selected creative boutique Quality Meats to handle its brand advertising. The work was previously handled in-house.
- Franchise **Care Bears** selected Ralph as its social AOR following a review. The agency will handle all social media duties.
- Baby apparel company **Carter's** selected Tinuiti as its integrated AOR across all of its brands, including Carter's, OshKosh B'gosh, Skip Hop, Little Planet, and Otter Avenue, in North America, replacing incumbent Assembly.
- State-owned Chinese automaker **Changan** selected Mediaplus International as its media AOR in the European market with an initial focus on Germany, Italy, Poland, Spain, and the UK. The agency will handle all media duties, including brand and performance activities across all traditional and digital channels.
- Healthcare giant **CVS Health** kicked off a review of its creative, media, and CRM business as part of a consolidation exercise. Incumbent integrated agency Publicis Groupe is expected to defend an account that includes insurance (Aetna), pharmacy benefits (CVS Caremark), and retail.
- **Delta Air Lines** selected Omnicom Media as its global media AOR following a review, replacing incumbent PHD and Publicis's Digitas across the entire brand's portfolio, including Delta Vacations and Delta's co-branded partnerships. A bespoke team will service the account.
- Brown-Forman's **Diplomático Rum** selected Dallas-based ad agency Lerma/ as its creative and social AOR in the US. The agency will handle strategy, creative development, and organic social management.
- **Dropbox** selected Big Spaceship as its social AOR, expanding its existing project-based relationship. The agency will handle all social duties including channel strategy, visual identity, and content development.
- **Dyson** selected Omnicom Media as its media planning and buying AOR. IPG Mediabrands (specifically UM) had held the account since 2021. Following Omnicom's acquisition of Interpublic Group in late 2025, the existing service team was expanded into a broader Omnicom Media solution. Publicis Media will continue to manage Dyson's media business in China and Hong Kong.
- Pet health insurance provider **Embrace Pet Insurance** selected Gale as its integrated AOR. The agency will handle paid media, influencer marketing, CRM, and creative.

- **Farmers Insurance** kicked off a review of its media and creative accounts. Incumbent RPA is expected to defend. Both reviews are believed to be run independently.
- **First Interstate Bank** selected TDA Boulder as its integrated AOR following a review. The agency will handle all creative and media planning and buying duties including online video, digital, print, out-of-home, mobile, and social across consumer and business marketing.
- Brazilian steakhouse chain **Fogo de Chão** selected independent Tombras as its integrated AOR following a review and replacing other roster agencies such as Stagwell's Gale. The agency will handle creative and media duties.
- Coca-Cola Co.-owned beverage brand **Fuze Tea** selected WPP Open X team led by Ogilvy Paris as its global creative AOR following a review, replacing incumbent McCann.
- Beverage giant **Gallo** selected Horizon Media as its media AOR following a review, replacing six-year incumbent UM. The agency will handle all media planning and buying duties across the brand portfolio, including wines, spirits, malt beverages, and ready-to-drink products, but also tackle measurement and audience development.
- **Gilead Sciences** kicked off a review of its media account. Incumbent IPG Initiative (now part of the Omnicom Media platform) is expected to defend.
- Home-furnishings brand **Green Front Furniture** selected Dotted Line Agency as its creative AOR following a review. DLA is based in Richmond, Virginia, and Atlanta.
- Health-oriented beet brand **Humann** selected Eden Collective as its media AOR. The agency will handle all media duties including full-funnel planning, budget allocation and channel-specific strategy and measurement.



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—Adrienne Calabria
Marketing Operations Lead
Bayer Crop Science

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Contributed by: Agency Mania Solutions

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The results speak for themselves:

- 100% compliance from all marketers and agencies
- 2 steps eliminated from the SOW approval process
- Full adoption reached within 3 months

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- **Hyundai Motor Group** retained Havas Media Network as its global media AOR for the 15th year following a review. The agency will handle all media planning and buying duties for Hyundai, Kia, and Genesis brands in Europe, Middle East, Asia Pacific, and Latin America. The agency will partner with the brand's AOR, Innocean and Canvas Worldwide (in the US).
- **i-Health**, a division of nutrition, health, and beauty firm dsm-firmenich, selected Dentsu as its integrated AOR following a review. The agency will handle all creative and media duties including integrated strategy, media buying and execution, creative development, and measurement for its brands (Culturelle, AZO, and Estroven). The integrated Dentsu team across media and Dentsu Creative, Dentsu X, will lead the work.
- **IBM** selected Omnicom as its global media AOR following a review, replacing the incumbent WPP Media, which declined to defend the media account (IBM's longtime creative AOR, WPP's Ogilvy, is also not participating in the creative review underway). Omnicom's Initiative (originally part of IPG) was handling IBM's media business in EMEA.
- Hiring platform **Indeed** selected Stagwell's 72andSunny as its global creative AOR, expanding the agency's existing relationship with the brand. The agency will handle strategy, brand and product marketing, and integrated creative work, as well as the creation of integrated ad campaigns from its Los Angeles and Amsterdam offices.
- **Indian Motorcycle** selected digital marketing agency Noise Media as its creative and performance media AOR in the US. The agency will handle creative, social, and performance media across key digital channels.
- Pharma company **Indivior** selected Havas to serve as its integrated AOR in the US following a review, replacing incumbent McKinney. The agency will handle media, creative, integrated strategy, and digital.
- Grocery firm **Kroger** selected McCann as its creative AOR following a review, replacing seven-year incumbent DDB New York. The agency will handle all creative duties in the US for its 2,700 stores, including the Ralph's, Dillon's, and Pay Less super market chains.
- L'Oréal-owned **Maybelline New York** and Essie selected VML as their social media AOR in the US following a review. The work had been done internally. The agency will handle social strategy, content production, and real-time community management, listening, and performance measurement, but influencer marketing is excluded from their scope.
- **Microsoft** selected Publicis Groupe as its global media AOR, without a review, to consolidate a significant part of its media account (estimated at \$1.2 billion) that had previously been managed by Dentsu. The move includes an expanded collaboration focused on artificial intelligence, integrating both companies' tools, technology, and data aimed at enhancing client services. Dentsu retained media planning and buying related for Xbox.
- Luxury accessories brand **MZ Wallace** selected January Digital as its media AOR without a review. The agency will handle all media duties including paid media across Meta, TikTok, and Google.
- Snacking tomatoes brand **NatureSweet** selected 270B as its new creative AOR following a review and expanding its existing digital relationship. The agency will handle broader brand strategy, creative development, social, digital, and integrated campaign execution across channels.
- **Navy Federal Credit Union** kicked off a review for its creative business. Incumbents MullenLowe (now part of TBWA) and TBWA\Chiat\Day Boston are expected to defend.
- Take-Two Interactive Software-owned gaming brand **NBA 2K** selected Goodby Silverstein & Partners as its creative AOR following a review. Prior creative and strategic work was done in-house. The agency will handle building a platform across launch, live seasons, and community engagement.
- Gaming system **Nex Playground** selected independent Zambezi as its creative AOR and Scale by Los Angeles and Minneapolis-based Zambezi as its media AOR.
- Pizza oven brand **Ooni** selected Croud as its global media AOR following a review, moving the work from its in-house agency to an external partner. The agency will handle media strategy, planning, activation, measurement, and analytics for North America, the UK, France, Germany, and the broader European region.
- Maker of outdoor grills **Outdoor Brands** selected Acadia as its media AOR and The Variable as its creative AOR following a review. The brand also selected Gear Communications as its PR agency (earned media strategy and storytelling/product visibility). The media AOR will handle full-funnel media strategy and investment across national, digital, DTC, and retail media networks, including Amazon, Walmart, The Home Depot, and Lowe's.
- Natural gas and electric utilities giant **Pacific Gas and Electric** selected Venables Bell + Partners as its creative AOR following a review. The companies worked together for eight years more than a decade ago. The agency will handle brand strategy, creative development, and integrated media, in collaboration with long-term media partner Supply.
- Over-the-counter healthcare and wellness firm **Prestige Consumer Healthcare** selected Horizon Media as its media AOR following a review, replacing incumbent Columbus, Ohio-based The Shipyard. The agency will handle planning and buying duties for the brand's portfolio (Monistat, Summer's Eve, Dramamine, Fleet, BC, Goody's, Clear Eyes, TheraTears, etc.) as well as brand strategy and integrated media execution across video, digital, social, and influencer channels.

- **Publix** selected Goodway Group as its shopper marketing AOR as part of a consolidation to build seamless shopper experience. The agency will handle all consulting, connection, and commerce duties for the brand.
- **PurposeBuilt Brands** selected Horizon Big as its media AOR, expanding its existing partnership with the firm and its portfolio of brands including Weiman, Goo Gone, Green Gobbler, and other home care brands. The agency will handle all media duties including strategy, planning, and activation across search, social, connected TV, retail media, online video, streaming audio, display, and programmatic, along with traditional channels as well as brand-building and retail media activation.
- Home furnishings retailer **Raymour & Flanigan** selected Omnicom's PHD USA as its new media AOR following a review, replacing incumbent Dentsu. The agency will handle all media activities for the 147 showrooms, outlets, and clearance centers.
- Semitruck trailers manufacturer **Stoughton Trailers** selected Minneapolis-based Broadhead as its first creative AOR following a review.
- Fresh, custom-made salads restaurants **Sweetgreen** selected Wpromote as its paid media AOR. The agency will handle media across all channels for the 280 locations in the US.
- Restaurant chain **The Cheesecake Factory** selected StrawberryFrog as its media AOR following a review. The agency will handle all media buying and planning duties for its 200 locations nationwide.
- Cosmetics and beauty giant **The Estée Lauder Cos.** selected WPP as its global media AOR following a review as part of a consolidation, replacing several incumbent agencies—Monks in North America, Brainlabs in the UK and Ireland, and Stagwell's Assembly in Europe and India. WPP previously did work for the brand in China.
- Manufacturer of tough adhesives and adhesive products **The Gorilla Glue Company** selected Quad's Rise as its media AOR following a review. The agency will handle media planning, buying, and measurement for the brand (including its skincare brand O'Keeffe's) across digital and traditional media channels.
- Gaming accessories brand **Turtle Beach** selected GUT New York as its creative AOR following a review. The New York office will be supported by the global GUT network (Miami, Toronto, and Amsterdam).
- **The US Soccer Federation** selected M+C Saatchi North America as its strategic integrated AOR. The agency will handle data and audience insights, partnership marketing, experiential marketing, brand development, and performance marketing in light of the 2026 FIFA World Cup Tournament.
- **US Army** kicked off a review of its \$4 billion account, currently with Omnicom (originally with DDB Chicago since 2018 and then folded into TBWA after Omnicom's acquisition of IPG). The selected agency will handle creative development, media planning and buying, production, CRM, digital and website management, public relations, events, sponsorships, and advanced analytics.
- **Unilever** selected social agency Samy as its global-influencer AOR for its foods business group in 13 markets based on its social-first approach, which is designed to promote brand participation in culture in real time. Samy plans to leverage its proprietary Maia platform, providing Unilever Foods access to more than 120 million influencers worldwide.
- **Valvoline Instant Oil Change** selected Dallas agency 3Headed Monster as its creative AOR following a review. The agency will handle strategy, creative, and production for the brand's 2,300 franchised and company-operated service centers.
- **Waterloo Sparkling Water** selected Dentsu Creative as its social AOR following a review. The agency will handle all social media duties including strategy, content, and production for the brand portfolio.
- E-commerce-native home goods retailer **Wayfair** selected Chicago-based Highdive as its creative AOR following a review, replacing two-year incumbent Havas Chicago.
- Restaurant chain **Wendy's** selected WPP as its media planning and buying AOR in the US following a review, replacing incumbent Publicis Groupe's Spark Foundry. The agency will partner with the brand's creative AOR, VML, in a move to bring creative and media under the same group, WPP.
- **Zoom** selected independent agency PMG as its first global media AOR following a review, replacing its in-house agency team. The agency will handle all media duties including buying and planning, developing data-backed strategies, measurement, and producing customized research.

Agency roster summary:

IP= Review in progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
 ACURA	American Honda Motor Co. (Acura)	MullenLowe	Creative AOR	Unknown	RPA	N
 ARS RESCUE ROOTER	American Residential Services (ARS)	Unknown	Media AOR	US	Horizon Next	Unk
 ATD	American Tire Distributors	Unknown	Integrated AOR	North America	Ammunition	Y
 betway	Betway	Unknown	Integrated AOR	Global	M+C Saatchi Sport & Entertainment	Y
 BLAZE PIZZA	Blaze Pizza	None	Media AOR	US	Bloom Ads Global Media Group	Y
 Bristol Myers Squibb®	Bristol Myers Squibb	IPG Mediabrands	Media	US	Unknown	IP
 BURGER KING	Burger King	Unknown	PR AOR	US	Praytell	Unk
	Burger King	Unknown	Social Media AOR	US	Mojo Supermarket	Unk
 BUTTERBALL	Butterball	Unknown	Integrated AOR	US	Carmichael Lynch	Y
 Canva	Canva	In-house Agency	Brand Advertising	Unknown	Quality Meats	Unk
 CARE BEARS	Care Bears	Unknown	Social AOR	Unknown	Ralph	Y
 carter's	Carter's	Assembly	Integrated AOR	North America	Tinuiti	Unk
 CHANGAN	Changan	None	Media AOR	Europe	Mediaplus International	Y
 CVS Health®	CVS Health	Publicis Groupe (expected to defend)	Creative, Media, and CRM	Unknown	Unknown	IP
 DELTA	Delta Air Lines	PHD and Digitas	Media AOR	Global	Omnicom Media	Y
 DIPLOMATICO RUM	Diplomático Rum	Unknown	Creative and Social AOR	US	Lerma/	Unk
 Dropbox	Dropbox	Big Space Ship (project based)	Social AOR	Global	Big Spaceship (expanding duties)	Unk
 dyson	Dyson	IPG Mediabrands	Media Planning and Buying AOR	Global	Omnicom Media	Y
 embrace pet insurance	Embrace Pet Insurance	Unknown	Integrated AOR	US	Gale	Unk
 FARMERS INSURANCE	Farmers Insurance	RPA (expected to defend)	Media and Creative	US	Unknown	IP
 First Interstate BancSystem	First Interstate Bank	Unknown	Integrated AOR	US	TDA Boulder	Y
 FOGO DE CHÃO	Fogo de Chão	Gale (and others)	Integrated AOR	Global	Tombras	Y

Agency roster summary:

IP= Review in progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Fuze Tea	McCann	Creative AOR	Global	WPP Open X	Y
	Gallo	UM	Media AOR	Global	Horizon Media	Y
	Gilead Sciences	IPG Initiative (expected to defend)	Media	Unknown	Unknown	IP
	Green Font Furniture	Unknown	Creative AOR	US	Dotted Line Agency	Y
	Humann		Media AOR	US	Eden Collective	Unk
	Hyundai Motor Group	Havas Media Network	Media AOR	Global	Havas Media Brands (retains duties)	Y
	i-Health	Unknown	Integrated AOR	US	Dentsu	Y
	IBM	WPP Media	Media AOR	Global	Omnicom	Y
	Indeed	72andSunny	Media AOR	Global	72andSunny (expanding duties)	Unk
	Indian Motorcycle	Unknown	Creative and Performance Media AOR	US	Noise Media	Unk
	Indivior	McKinney	Integrated AOR	US	Havas	Y
	Kroger	DBB New York	Creative AOR	US	McCann	Y
	Maybelline New York	In-house Agency	Social Media AOR	US	VML	Y
	Microsoft	Dentsu	Media AOR	Global	Publicis Groupe	N
	MZ Wallace	Unknown	Media AOR	US	January Digital	N
	NatureSweet	Unknown	Creative AOR	North America	270B	Y
	Navy Federal Credit Union	MullenLowe, TBWA/Chiat/Day Boston (expected to defend)	Creative	US	Unknown	IP
	NBA 2K	In-house Agency	Creative AOR	Unknown	Goodby Silverstein & Partners	Y
	Nex Playground	Unknown	Media AOR	US	Scale by Zambezi	Unk
	Nex Playground	Unknown	Creative AOR	US	Zambezi	Unk
	Ooni	Unknown	Media AOR	Global	Croud	Y

Agency roster summary:

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COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Outdoor Brands	Unknown	Creative AOR	North America	The Variable	Y
	Outdoor Brands	Unknown	Media AOR	North America	Acadia	Y
	Pacific Gas and Electric	Unknown	Creative AOR	US	Venables Bell + Partners	Y
	Prestige Consumer Healthcare	The Shipyard	Media AOR	US	Horizon Media	Y
	Publix	Goodway Group	Shopper Marketing AOR	North America	Goodway Group (consolidation)	Unk
	PurposeBuilt Brands	Horizon Big	Media AOR	Global	Horizon Big (expanding duties)	Unk
	Raymour & Flanigan	Dentsu	Media AOR	US	PHD USA	Y
	Stoughton Trailers	None	Creative AOR	US	Broadhead	Y
	SweetGreen	Unknown	Paid Media AOR	US	Wpromote	Unk
	The Cheesecake Factory	Unknown	Media AOR	US	StrawberryFrog	Y
	The Estée Lauder Cos.	Monks, Brainlabs, Assembly	Media AOR	Global	WPP	Y
	The Gorilla Glue Company	Unknown	Media AOR	Global	Quad's Rise	Y
	The US Soccer Federation	Unknown	Strategic Integrated AOR	US	M+C Saatchi North America	Unk
	Turtle Beach	Unknown	Creative AOR	Global	GUT	Y
	Unilever	Unknown	Influencer AOR	Global	Samy	Unk
	US Army	Omnicom	Integrated AOR	US	Unknown	IP
	Valvoline Instant Oil	Unknown	Creative AOR	North America	3Headed Monster	Y
	Waterloo Sparkling Water	Unknown	Social AOR	US	Dentsu Creative	Y
	Wayfair	Havas Chicago	Creative AOR	Global	HighDive	Y
	Wendy's	Spark Foundry	Media Planning and Buying AOR	US	WPP	Y
	Zoom	In-house Agency	Media AOR	Global	PMG	Unk

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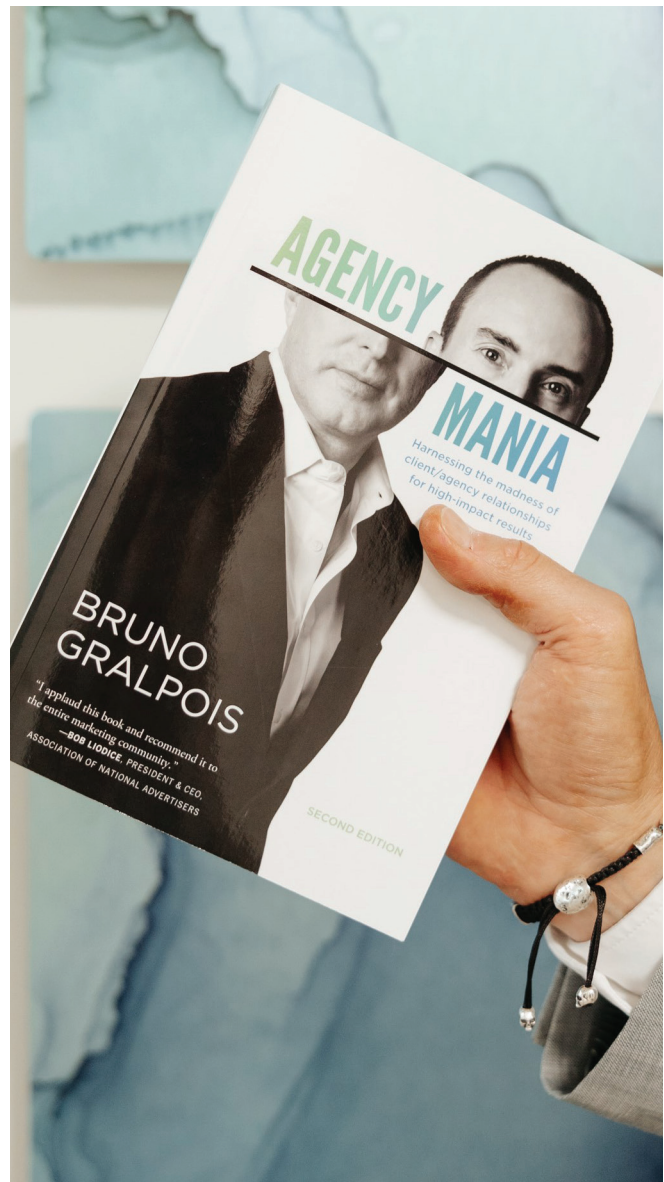


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A word about the author: Bruno Gralpois is a globally recognized thought leader in business partnerships, renowned for his pioneering work in establishing agency management as a critical discipline among the world's largest advertisers and Fortune 500 companies.

As the author of the industry-defining book *Agency Mania* and the co-founder of Agency Mania Solutions, a leading cloud-based software company, Bruno has dedicated his career to fostering successful client-agency relationships. His expertise, honed through leadership roles at Microsoft, Visa, and several pre-IPO software companies, has made him an authority on building and nurturing high-impact business partnerships.

In addition to his corporate achievements, Bruno is a key Faculty member at the Association of National Advertisers (ANA) School of Marketing, where he continues to shape the future of client-agency collaboration, driving growth and sustained business performance.

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



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