

Industry Update

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

May – June 2026 | Volume 88



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EXECUTIVE SUMMARY: May – June recap

Talent remains the lifeblood of the advertising industry, yet it has never faced a more pivotal moment.

AI is rewriting workflows, automation is compressing timelines, and new commercial models are redefining how value is created, measured, and rewarded. Creativity alone is no longer enough; brands increasingly expect proof of business impact, financial accountability, and measurable outcomes.

At the same time, economic uncertainty, geopolitical volatility, and rising media costs are forcing marketers to accomplish more with less.

Amid fierce competition among holding companies, consultancies, platforms, and AI-native challengers, the winners will not simply be the most technologically advanced, though it may seem compelling when you see investors pouring money into Silicon Valley's most closely watched AI companies (Anthropic, the developer of the Claude large language models, filed for an IPO after closing a \$65 billion Series H round at a \$965 billion post-money valuation, putting it ahead of rival OpenAI's last reported \$730 billion valuation).

But the true winners will be the organizations that successfully combine human ingenuity with data, measurement, and intelligent automation.

In a world increasingly powered by algorithms, talent remains the force that transforms capability into competitive advantage.



Bruno Galpois
Co-Founder and Principal,
Agency Mania Solutions

TALENT: Securing the right talent and resources

Talent is the oxygen of the advertising industry. Yet talent is under pressure as three converging forces reshape the marketing and agency landscape: AI, accountability, and commercial transformation. Outcome-based compensation and value-driven pricing continue to gain momentum as brands demand stronger links between marketing investment and business results. At the same time, concerns about principal media buying are driving renewed focus on transparency, governance, and measurement. AI adoption has accelerated from experimentation to execution, with agentic AI, autonomous media buying, creative intelligence, workflow automation, and AI-powered measurement becoming strategic priorities. Major players including OpenAI, Adobe, Omnicom, WPP, Publicis, and The Trade Desk are investing heavily in platforms designed to automate and optimize marketing operations. Meanwhile, organizational structures are evolving through new AI consultancies, integrated commerce offerings, and specialist agencies built for speed and efficiency. Together, these trends point to a future where competitive advantage is increasingly defined by data, technology, orchestration, and the ability to deliver measurable business outcomes at scale. Yet talent remains the connective tissue.

» GAME CHANGING

- Per Boathouse, **CEOs have shifted from viewing marketing as a profit center to a cost center.** 60% of CEOs view marketing as overhead, up from 35% in 2025. Now, just 40% perceive marketing as a function that drives growth compared with 60% in 2025. Only 38% of CEOs agreed their CMO was “best in class,” a 13% decrease. Sales growth is the #1 problem CEOs want marketing to solve, with 65% saying so, up from 57% in 2025.

» HIGH IMPACT

- The Association of National Advertisers (ANA) and the 4As issued **10 Positive Pitch Principles**:
 - 1) Begin with a mutual commitment to transparency
 - 2) Carefully consider the agencies invited to participate (incumbent, industry resources, limiting the number of participants)
 - 3) Establish and adhere to a mutually agreed-upon timeline
 - 4) Keep RFIs simple
 - 5) Chemistry counts (dedicate time, meet in person, include decision-makers)
 - 6) Define the role and value of speculative work
 - 7) Compensate for pitch labor and ideas
 - 8) Stop the pitch once a decision has been made
 - 9) Feedback is a gift (be constructive, use clear channels, don't ghost a participant)
 - 10) Negotiate a fair and mutually beneficial agreement (exclusivity, compensation, financial transparency)

- The **World Federation of Advertisers (WFA)** released its Annual Report 2025 showing a healthy mixture of curiosity, humility, and optimism in unpredictable times and a focus on building a human connection that drives business growth. Per the report, five critical areas where high-performing organizations excel:
 - 1) Leaders have the marketing fundamentals—brand building, creativity, strategy—in place
 - 2) Aligned growth strategy leaders harness the marketing fundamentals alongside robust data to identify the right strategic growth choices and translate them into action
 - 3) Cross-functional integration remains one of the biggest challenges and opportunities for marketing leaders
 - 4) People and technology leaders integrate AI and human creativity to amplify thinking
 - 5) Marketing's influence on the C-suite is at a crossroads
- Per the ANA, top challenges perceived by brands about **media transparency associated with media agency principal buying**:
 - 90% of marketers say their top concern is uncertainty about whether recommended media is in the client's best interest
 - 77% worry about loss of audit rights
 - 68% worry about a loss of quality in media placement, and 56%, fear a loss of delivery guarantees
 - 49% are concerned that use of principal media could increase cost of regular buys
 - 29% worry about a loss of rebates from media that provides them

Bruno Galpois from the new article:

4 Questions That Changed the Rules of Marketing Procurement

"Leaders who asked the right questions moved forward. Those anchored to the status quo fell behind."



agencymania.com

Want to learn more? Check out our article **"4 Questions That Changed the Rules of Marketing Procurement"**: What marketing procurement leaders asked in recent years—and why the powerful answers changed everything.

» NOTABLE

- Per ID Comms, the main themes of the **ANA Advertising Financial Management conference** were:
 - 1) Outcome-based pricing and value-based compensation (citing that agencies are pushing hard to be paid on outcomes, not time and materials)
 - 2) Principal-based media buying (referring to a recent trend where agencies buy inventory from media owners at bulk rates and then resell it to clients at a markup, effectively acting as media vendors, not agents)
 - 3) Positive pitch principles (endorsed by the ANA and the 4As by issuing “10 Positive Pitch Principles” to make pitches more transparent, respectful, and effective)
- Per Piscari CEO Mike Lander and the report “**Agency Reset Addendum Q1 2026: The Control Shift**”:
 - 1) Agency economics are under pressure, but not in a straight line
 - 2) The labor model is still weakening underneath
 - 3) Relationship value still matters, but not in the old way
 - 4) Right-housing is moving beyond routine execution

Q1 signals that agency CEOs should focus on:

 - 1) Publicis: the leaders are turning AI, data, and measurement into operating advantage
 - 2) WPP: the old holding-company architecture is being compressed
 - 3) WPP + Adobe: orchestration is becoming a commercial product
 - 4) Mega and other AI-native challengers: software is attacking the agency model directly
 - 5) Meta Advantage+: the platforms are absorbing the optimization layer
 - 6) Omnicom/IPG: the biggest players are rebuilding around scale, leverage, and platform-like control; but for smaller, independent agencies, value is moving toward data, workflow infrastructure, measurement, orchestration, and client-access control
- Microsoft-owned **LinkedIn** launched its Agency Certification program, offering brands a new way to identify agencies that are most familiar with the B2B social platform’s ad tools and have “demonstrated expertise in LinkedIn Ads and a commitment to delivering strong results through platform-aligned best practices” across campaign planning, execution, and measurement.
- Dallas-based ad agency **Lerma/** launched Sports Sponsorship ROI Evaluator/Ranker, a benchmarking tool that ranks professional sports teams on metrics including media efficiency (local media exposure, measured through estimated CPM), fan affinity (fan engagement and audience scale), and team trajectory (momentum and media visibility).

- Per McKinsey, the five steps to an **agentic marketing organization**:
 - 1) Define marketing jobs (roles and activities)
 - 2) Sort into agentic archetypes (classifying roles)
 - 3) Define modular agents
 - 4) Rethink human roles (workflows and R&R)
 - 5) Set priorities
- **AdForum** launched AskMaud, a new AI-powered creative intelligence tool, a sort of “creative intelligence companion” built on top of AdForum’s unique archive and metadata. It will allow strategists, consultants, creatives, and business development teams to explore advertising trends, campaign references, agency strengths, category patterns, cultural signals, and creative inspiration.
- Per Ad Age, **Cannes Lions International Festival of Creativity** made some changes in 2026. Industry Update picked the top three:
 - 1) New rules add human and AI fact-checking, stricter client sign-off, and three-year bans for agencies submitting fake work
 - 2) New awards include AI and retail subcategories (into the Creative Strategy and Creative Data Lions)
 - 3) CMOs get their own summit, titled the Lions Global CMO Forum

New agencies or capabilities, restructurings, & reorganizations:

» HIGH IMPACT

- **WPP** restructured its Commerce expertise (previously held within WPP Media and VML) into one team called WPP Commerce, an integrated arm that brings together specialists from across its agencies and its four main divisions: media, creative, enterprise solutions, and production. It also leverages retail partnerships such as Amazon.
- **Omnicom Precision Marketing** restructured its division by folding precision marketing and consumer experience agency Rapp into digital experience design agency Critical Mass, forming a team of 3,000 across a dozen offices globally. The move intends to strengthen Omnicom’s transformation consultancy and activation offerings (Credera will lead the transformation consultancy practice, with Critical Mass leading activation).
- **Horizon Media Holdings** formed a strategic partnership with Kartel, a startup AI content engine, in a move to unify creative and media workflows, along with performance data to boost campaign performance in real time. It effectively integrates the Kartel platform into HorizonOS, Horizon’s open tech platform designed to help brands plan, execute, and measure creative and media campaigns simultaneously.
- **WPP** launched HEX, a combined creative production studio, R&D lab, and consultancy, fueled by AI. The new studio, part of WPP’s broader production division and composed of 50 creative technologists, specializes in generative and agentic AI, gaming, immersive experiences, and robotics. The studio works with technology partners like Adobe, Google, and NVIDIA to test emerging tech and innovative applications.

- Software firm **Mint** launched Argus, an always-on solution that gives procurement and marketing teams full transparency, control/governance, performance monitoring, negotiation intelligence, and continuous optimization over every dollar spent. The solution tracks missing data granularity, unclaimed cost guarantees, shrinking data pools, static benchmarks, pricing distortions, and reporting lags.

» NOTABLE

- Former Alma leaders have launched **Jeorge+**, an independent creative agency based in Coral Gables, Florida, as an alternative to boutique shops that run on a roster model. Jeorge+ will provide access to senior talent and practitioners.
- VaynerX launched **Tamara Group** with a focus on culture and the attention economy. Clients include Ulta Beauty, Mrs. Meyer's Clean Day, Method, and PetSmart.
- Production studio **Silverside**, launched by agency Pereira O'Dell, announced its AI consultancy to help brands create their own AI marketing in-house through production pipelines powered by custom AI models trained on the clients' style guides, images, and videos of products, and other marketing and creative assets.
- New agency **Armory815** launched in Chicago to provide an array of services, including brand strategy, creative, experiential design, digital, and media planning/buying with a focus on industrial B2B, entertainment, retail and lifestyle, and nonprofits.
- Omnicom launched **Lola USA**, combining 180 US and adam&eveDDB New York into a micro-network within Omnicom, which also includes Lola Madrid and Lola\TBWA in Brazil. The agency provides brand and marketing strategy, creative campaigns, brand design, and social and editorial storytelling, supported by Omnicom's AI capabilities. Half of the staff is dedicated to creative roles. Clients include Porsche, adidas, Molson Coors, JetBlue, and Disney.
- **Dentsu** restructured its digital agency 360i brand by forming a small, US-only AI-native dedicated specialist social team outside of Dentsu Creative, pulling in support from Dentsu as needed, and billing clients on a fixed-fee basis. The agency will favor project-based work and social AOR assignments.
- **Gravity Media** and creative production company **The Good Work Quickly** launched Gravity Media Creative Agency, producing campaigns for brands, sports federations, and sponsors in a move to speed delivery and creative consistency during high-pressure live moments and multiplatform campaigns.
- **Havas** launched VOLYUM, a record label created by Havas' sonic branding agency, Art of Sound, to connect emerging artists and brands, with Virgin Music Group on board as a distribution partner. VOLYUM will seek out up-and-coming artists and get their music into brand marketing—whether that's commercials, social media campaigns, or live events.

AI (Artificial Intelligence):

» GAME CHANGING

- New York state enacted an **AI ad disclosure law** requiring clear labeling of AI-generated "synthetic performers" in advertisements. Advertisers violating the law face fines of \$1,000 for the first offense and \$5,000 for subsequent violations. The law has exemptions for movies, TV shows, and video games. The 4As and other industry groups, unlike SAG-AFTRA, voiced strong opposition, expressing concerns about compliance uncertainty and potential burdens on advertisers and brands.
- **OpenAI** launched its self-serve Ads Manager for ChatGPT using cost-per-click bidding, conversion pixels and expanded measurement tools. Ads appear below chat responses. They consist of the advertiser's name, a favicon, a headline, a short description, and a link. Early partners included leading agency holding companies and tech platforms such as Omnicom, Publicis, WPP, Dentsu, Adobe, Criteo, and Kargo.
- **Omnicom** tested agentic media buys via its homegrown OMNI platform to deploy as part of its routine media buys for certain clients (buying inventory available on certain publishers, conducting agent-to-agent buying) in a move to fully automate and compress the media supply chain.
- **The Trade Desk** launched its new agentic trading capability, Koa Agents, to automate media buying decisions within the demand-side platform (DSP) and assist in configuring campaigns. The firm also announced that Stagwell's ad buyers will use The Trade Desk's new agentic AI suite to configure campaigns to run through the DSP by connecting them to Stagwell Media Platform. It is using Open AgenticKit, a new framework for agent-to-agent communication developed by The Trade Desk.
- **Adobe** launched AI agents such as "CX Enterprise" to help brands automate digital marketing and advertising strategies by personalizing consumer experiences through Adobe Experience Platform. The agents bring together data signals across interactions to help the brands it works with understand consumer needs and preferences. Adobe also streamlines brands' content supply chains by using Adobe GenStudio. Adobe CX Enterprise integrates AI agents, developer tools, and agent skills. Major agencies such as Omnicom, Publicis, and WPP have standardized on the platform to co-develop client solutions.
- Per McKinsey, **Agentic AI** is estimated to be able to power 60% of tasks across the marketing process. The estimated share of AI-powered work across core marketing workflows:
 - Strategy (creating marketing strategies) 50%
 - Creation (developing and deploying new content) 70%
 - Execution and optimization (executing cross-channel marketing and supporting e-commerce and web experiences) 60%-70%

» HIGH IMPACT

- Per Digiday, brand advertisers are increasingly integrating **AI into workflows**, with generative AI more widely used than predictive AI. While 82% of marketers use generative AI for creative production, 48% use predictive AI for measurement and KPI analysis. However, trust and complexity issues hinder the adoption of agentic AI, which operates autonomously without human feedback.
- **Sell-side platform Magnite launched its own media buying agent** designed to automate routine tasks in campaign execution, respond to performance signals in near real time, improve how buyers discover and connect with premium supply, and accelerate optimization cycles, all within a single conversational interface. The tool is integrated with Publicis Media Exchange (PMX) and has a connection to Disney inventory.
- Confectionery giant **Hershey** partnered with Mutinex (underpinned by Claude and Gemini) and Tracer (for data setup, cleaning, and standardizing fragmented data across marketing and retail systems) to automate its marketing mix modeling (MMM) with agentic AI, compressing timelines and reshaping how it allocates media budgets.
- **Omnicom Media Group's influencer agency, Creo**, launched a capability that uses agentic AI to identify and fix risky or undesirable creator content made on behalf of Omnicom's clients. The tool was built using Google's large language models for GeminiVeo and Nano Banana to identify and remove flagged creator content (e.g., videos that don't meet a brand's safety standards) and therefore avoiding reshooting content and making costly additional edits.

Noteworthy quotes:

- » "CMOs are appreciative of the fact that the agencies are trying to change, and that they're creating these platforms to be more technology enabled." —Valeria Balaro, CMO, **Star**
- » "I think they [WPP] are further gone than before. It's catatonic. It's a bust of a flush." —Sir Martin Sorrell, Executive Chairman, **S4 Capital**
- » "The better we know people, the better we can orchestrate. Be clear on what your needs are. Don't treat agencies like a vendor. They are a strategic partner that can provide insights that can change the course of your business. Be honest if something is hurting. It's about frequent feedback and continuous improvement." —Joanne Davis, Founder, **Joanne Davis Consulting**
- » "For our key strategic suppliers, we use a detailed program that includes top-to-top quarterly meetings, formal 360 reviews, and ongoing governance structures." —Sherry Ulsh, Director of Indirect Procurement, **The Hershey Co.**
- » "The landscape is just so fragmented. In the past you had one main agency, but now you can have three, four, 10 other little vendors that you are working with. It requires a lot of your mind space to manage all of these relationships and make sure you're getting the best out of them." —Valeria Balaro, CMO, **Star**

- **Stagwell** launched Agent Cloud as part of its Marketing Cloud SaaS offering designed specifically for small- to-medium-size businesses (SMBs) and in-house agency teams. Leveraging OpenAI's ChatGPT and Google's Gemini, with agents developed in-house, the tool embeds automated marketing expertise directly into the workflow of SMBs and in-house teams, with 10 specialized agents (e.g., Brand Audit, Copy Feedback, Image Generator), combining proprietary first-party tools with third-party marketing technology.
- Per DAVID, many "**AI-powered**" platforms fail because they rely on legacy data and methodologies never designed for machine learning. AI is collapsing the economics of marketing, forcing pricing, workflows, and research models built on labor and time to break. The true industry divide will be between AI-native companies with purpose-built data foundations and those retrofitting AI onto flawed systems.

» NOTABLE

- **Collectively** launched Chorus, a measurement tool that tracks how large language models represent brands and enables companies to influence those results through creator partnerships. Clients include Haleon, Danone, Unilever, Intuit, and Salesforce. The agency also launched the Gen AI Creator Residency Program with The Brandtech Group to train the group's 7,000-person staff on using generative AI tools to produce content.
- Customer experience management platform **Sprinklr** launched an AI tool, LLM Insights, that uses social listening as a way to inform generative engine optimization (GEO) strategies. Sprinkler analyzes conversations consumers are having that are relevant to the brand and its category and generates suggestions for how to meet these talking points on AI search platforms.

- » "Most companies don't have an AI problem. They have a data readiness problem." —Sarah Martinez, Chief Commercial Officer, **Tracer**
- » "Over the next few years, the real divide will be between companies that are AI-native and those that are AI-added. Between companies whose data foundations were built for machine learning and those trying to retrofit AI onto legacy systems. Because in AI, the foundation matters. And if the data foundation is broken, no amount of AI magic dust can fix it." —Ian Forrester, CEO, **DAVID**
- » "When that creative breaking through—that content breaking through—matters more than ever, that's where that human insight is required. I still believe that the best connecting work, the best creative work, the best content, captures a core customer insight, a core consumer need, desire or want." —Lara Hood Balazs, CMO and EVP Global Marketing, **Adobe**
- » "Strong client relationships aren't built on efficiency; they're built on trust, knowledge, consistency and good judgment over time. AI can support that journey, but it doesn't replace the conversations, moments of alignment or reassurance that come from knowing someone genuinely understands your business and priorities." —Wendy Owen, Senior Account Director, **Publicis Pro**

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



Creative recognition is valuable, but is it translating into measurable business results? Marketing organizations are placing greater emphasis on measurement, accountability, and AI-enabled efficiency. Brands are increasingly seeking to quantify the financial impact of creativity, improve media transparency, and connect marketing investments directly to business outcomes through advanced measurement frameworks, MMM, incrementality testing, and standardized KPIs. AI-native workflows are accelerating across planning, content creation, optimization, governance, and search visibility, while marketers focus on improving coordination, consistency, and decision traceability. The growing importance of creator ecosystems, AI-powered search, and cross-channel measurement is reshaping how brands allocate budgets and evaluate performance. At the same time, advertisers are updating agency contracts, demanding greater transparency, and adopting more rigorous briefing and procurement practices.

» GAME CHANGING

- Per the **ANA**, 56% of brand advertisers updated their media agency contract in the past year, and 70% have updated it within the past two years. Brands are updating contracts more frequently due to transparency concerns and the evolution of technology and its impact on agency work.

» HIGH IMPACT

- The ANA issued “**The Stage of the Martech RFP: A Research Summary for MarTech & Marketing Service Provider Leadership**” in an effort to improve this industrywide practice. Per the report, nearly 75% of vendors say they sometimes or frequently decline to participate in RFPs due to process quality concerns. Over 60% are regularly asked for custom work: demos, strategy, and creative that goes beyond reasonable evaluation requirements. And 100% of respondents say that success criteria are never fully defined in the RFPs they receive.
- Per Mitchell Caplan, in light of new, emerging **AI-native marketing workflow frameworks**, advertisers should be designing workflows around three core principles:
 - 1) Coordination efficiency: Stop bleeding time in handoffs (to reduce wait time, rebriefing, duplicative efforts)
 - 2) Consistency control: Repeatable output beats brilliant one-offs (using a brand voice “operating manual,” modular messaging blocks, quality control, less versioning)
 - 3) Decision traceability: If you can’t link actions to outcomes, you can’t improve
- The **ANA** released its “**Media Briefing Best Practices and Guidelines**” to help address gaps by bringing more structure and consistency to the media briefing process. It outlines and provides practical guidance on the core elements that should be included in every media brief, highlighting areas such as KPIs, audience definition, timing, budget, and nonnegotiables. It also reinforces the importance of clearly defined roles, ownership, and post-brief alignment to ensure media briefs are well-built and effectively carried out throughout the planning process.
- **Google**, using its Gemini AI models to analyze billions of signals, says it removed 1.7 billion ads and suspended 3.3 million advertiser accounts in the US in 2025 due to common violations such as abusing the ad network, misrepresentation, sexual content, personalization violations, and scams and threats involving dating and companionship ads. In its 2025 Ads Safety Report, Google stated it blocked or removed 8.3 billion ads and suspended 24.9 million advertiser accounts.
- **Coca-Cola** built a system that assigns a single “currency” to every touchpoint where its brand appears, whether online or offline, as a means to improve media effectiveness. The system allows marketers to compare the effectiveness of any media touchpoint. The methodology, called Universal Media Measurement, is based on applied causality analysis to link media quality (the independent variable) with sales outcomes (the dependent variable).
- CPG giant **Nestlé** deployed a new integrated process and tool from CreatorIQ and CreativeX that identifies creator content and posts that could perform well as advertising and align with internal ad quality standards (such as branding, storytelling, and relevance). Submissions are graded using creative analytics platform CreativeX’s AI-powered technology, with scores fed directly into CreatorIQ’s platform to allow for review and optimization by Nestlé campaign managers before any media investment is made.
- Per the ANA and its “**State of Marketing Measurement Report**,” conclusions and guidance to brands include:
 - 1) Anchor measurement to business outcomes and not media metrics (methods with the highest business-outcome confidence such as MMM, incrementality, and triangulation are not the easiest, but they are the most credible)
 - 2) Design for cross-channel reality (standardize KPIs across channels)
 - 3) Shift from reporting to testing
 - 4) Build a privacy-resilient measurement stack now (building durable measurement systems that work across changing privacy laws, platforms, and markets)
 - 5) Use AI to accelerate insights but not to replace judgment
 - 6) Invest in people and operating models

- Per the **ANA's Programmatic Transparency Benchmark**, here are the six key Q1 2026 Benchmark findings:
 - 1) Performance divergence widens—quality, not cost, is the differentiator
 - 2) TrueCPM confirms its role as the essential efficiency metric
 - 3) Quality optimization reduces cost—it doesn't increase it
 - 4) Pricing pressure reverses after Q4 peak,
 - 5) Significant improvements are within reach for marketers taking the right steps
 - 6) MFA remains low but posts slight increase. The report also concludes that nonmeasurable inventory is the single biggest problem
- The **WFA** released a new report, produced in partnership with DEPT®, called **"The Future of Discoverability: Why AI visibility is now a strategic marketing priority,"** designed to share best practices for brands in the age of AI-powered search. 96% of participants believe that AI-generated search will have a transformational or significant impact on the way consumers discover and choose their brands. Only 6% currently have a clear strategy, ownership, and measurement framework to ensure AI visibility, with 92% actively developing or closely monitoring developments.

» NOTABLE

- **Creative PM** launched an offering to help brands generate creative benchmarks (market-based CPMs for creative outcome) and drive allocation decisions (Creative Multiplier methodology showing the financial value created) to demonstrate creative's financial contribution to return with the same rigor as media. The firm argues that creative's impact has never been counted financially, and direct financial linkage was never made between weak, average, or great creative and financial performance leading to ROI being biased to media.
- Cruise line **Virgin Voyages** hosted more than 1,000 content strategists and content creators (whose follower counts ranged from a few thousand to over a million) on a three-day cruise called Creator Voyage, marking its largest-ever creator campaign. The brand is focused on the vast amounts of organic creator content, rather than just traditional advertising, to cut through increasingly fragmented social feeds. The brand allocates half of its total marketing budget, excluding paid media, to creators. More than 3,300 posts on TikTok and Instagram were generated.

Awards:

- Kantar released its **BrandZ Top Most Valuable Global Brands 2026**. Google unseated Apple to take the top spot for the first time since 2018, fueled by the integration of Gemini into all of its products. Apple, Microsoft, Amazon, and Nvidia rounded out the top five, the same as last year. Noteworthy: Anthropic-owned Claude has debuted in the global top 100 at #27, with a brand value of just under \$100 billion. Meanwhile, rival ChatGPT came in 15th, a sharp increase from 60th last year.
- **Anheuser-Busch InBev**, the world's 15th-largest advertiser, was named Creative Marketer of the Year for 2026 by the Cannes Lions International Festival of Creativity, the first company to receive the honor three times (previously 2022, 2023). The brand took home 37 Lions at last year's festival. AB InBev also topped the Global Effie Index as the world's most effective marketer for four consecutive years.
- **30th annual Webby Awards 2026** advertising campaign winners included:
 - Best B2B campaign: Centivo "How Dare We" (territorial)
 - Best community engagement: Filet O Fish Facebook Society (Leo UK)
 - Best direct response campaign: Mattel Brick Shop (Thinkerbell)
 - Best growth strategy: Abbott Elementary's Season 5 social campaign (Disney Branded Television)
 - Best partnership or collaboration: Kyle F*cking Connor (Courage)
 - Best social impact campaign: "Uncensor Your Health" (Saatchi & Saatchi)
 - Best video campaign: "A Time And A Place" (Mother)
 - Brand strategy: YouTube Rickrolls the Internet for its 20th birthday celebration (We Are Social North America)
 - Corporate social responsibility campaign: LinkedIn's "The Mom B.A." (R/GA)
 - Digital campaign: Smirnoff x Troye Sivan: "Go Off!" (Dazed Studio)
 - Integrated campaign: The White Lotus' Season 3 integrated campaign (HBO Max)
 - Launch or drop: NikeSkims spring '26 campaign featuring BLACKPINK's LISA (Karla Otto)
 - Real-time response campaign: The Dr Pepper jingle (Deutsch)
 - Social media campaign: Severance Season 2's tune-in campaign (Apple TV). 2026 media campaign winners included: Best B2B campaign: "From Farmers Market to Global Markets" (Razorfish)
 - Best media strategy: "There We Are" (Publicis Middle East)
 - Best shopping or social commerce campaign: "Spell Codes" (Courage)
 - Best use of digital media: "There We Are" (Publicis Middle East)
 - Best use of earned media: The death of Duo (Duolingo)
 - Best use of social media: "Donate Your Bio" (Terri & Sandy)

Noteworthy quotes:

- » “The separation of both agency and brand is really important... I still think there’s human intuitiveness that’s needed. I think critical thinking is one of the most important levers that we have not focused on as an industry in general.” —Vinny Rinaldi, VP Consumer Connections, **The Hershey Company**
- » “The AI side of things requires CMOs to be much more technical as well. You need to be an architect of the technical system that’s going to enable you to do the work that you need to do.” —Valeria Balaro, CMO, **Star**
- » “The real fatigue isn’t with advertising. It’s with meaninglessness. And meaning, thankfully, is still something machines can’t make.” —Rachel Lyndon-Jones, Founder and CMO, **Ouma**
- » “You can’t price outcomes without documenting and measuring scope of work deliverables.” —Michael Farmer, Founder, **Farmer & Company**

- » “I strongly believe in creativity. I believe that creativity remains the best, or the biggest, competitive advantage that brands have.” —Leandro Barreto, CMO, **Unilever**
- » “The best briefs I’ve seen are almost annoyingly simple. One problem. One tension. One clear takeaway. Anything more is usually insecurity disguised as thoroughness.” —Rami Dudin, Head of Strategy, **Courage**
- » “A media agency relationship is like a plant. Most advertisers let it die. Pitch completed. Media agency contract filed. Job done! Right? Then they wonder why the magic from the pitch never showed up in the work. Or faded so fast. It should not have to be this way. The pitch planted the seed. The growth is up to you!” —Philippe Dominois, CEO, **Abintus**

AMS CASE STUDY

“Agency Mania has **enhanced efficiency** and **streamlined** our processes...”

—Adrienne Calabria
Marketing Operations Lead
Bayer Crop Science

From SOW Bottlenecks to Real-Time Scope Visibility

Bayer Crop Science was managing agency scope across a complex, multi-brand portfolio—with manual data entry, disconnected spreadsheets, and limited visibility into costs and resource burn, slowing everything down. Their prior off-the-shelf solution provider was adding friction rather than removing it.

By implementing ScopeDeliver™, they gained a centralized source of truth for scope, staffing, and financial data.

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

Click here to read the full case study.

FINANCIALS: Driving efficient use of resources



The global advertising landscape remains influenced by economic uncertainty, geopolitical tension in Europe and the Middle East, political change, and pressure on household finances, all of which continue to shape consumer confidence and advertiser behavior. Brands are facing flat budgets, rising media inflation, increased geopolitical and technology risks, and growing pressure to deliver short-term results. Major events such as the FIFA World Cup are expected to drive significant advertising growth and media market inflation. The FIFA World Cup in North America indeed represents one of the most commercially significant media events in recent years. Meanwhile, the battle for supremacy (or survival?) among advertising holding companies is underway, with a giant Omnicom flexing muscle (post-acquisition of IPG), Publicis Groupe showing strong results, WPP working hard to rebound, and new, agile players like Stagwell taking names.

» GAME CHANGING

- Per the **WFA** and its **Global Risk Barometer**, 90% of senior marketers say the business environment is less predictable and riskier than 12 months ago and 79% agree it does not feel like business as usual. As a result, budgets are under greater scrutiny, according to 97% of respondents (up 18%), and 92% of multinationals (up 23%) are looking to internal collaboration to minimize danger. The pressure to take a short-term approach is clear, with 70% agreeing they must focus more on immediate objectives at the expense of long-term strategic planning, up 15% from 2025. One other noticeable change is the rise of technology as a primary source of risk. Senior marketers now rate tech such as AI as 6.9 on a scale of 1–10 compared with 6.3 in 2025. That still puts it behind the geopolitical environment (8.0) and economic trends and outlook (7.7), but it now rates ahead of tightening regulations (6.6).
- Per Adfidence, **auditing media** twice a year is no longer enough: Automated media buying breaks the traditional audit model as small configuration errors now scale globally in real time. Platform defaults and product updates quietly change targeting and brand safety assumptions, especially in new launches. Media governance is shifting from periodic audits to continuous oversight built into planning, activation, and agency collaboration.

» HIGH IMPACT

- Per **Gartner**, CMOs allocate an average of 15.3% of marketing budgets to AI, but only 30% of marketers report mature or fully developed readiness to scale those capabilities. Marketing budgets remain effectively flat at 7.8% of company revenue in 2026, even as 56% of CMOs say they lack sufficient budget to execute their annual strategies. Organizations with mature AI capabilities are pulling ahead, allocating an average of 21.3% of marketing budgets to AI and reporting higher overall marketing investment.

- Per the WFA, **global media price inflation** is expected to increase by 4.4% for 2026, thanks largely to the impact of the 2026 FIFA World Cup. Major sporting events have historically created strong inflationary effects on media markets, extending across traditional media—linear TV, OOH, and DOOH.
- Per **ECI Media Management** and its Q2 2026 media inflation report, in the US, TV is forecast to see the sharpest inflationary increase, rebounding from deflationary years, driven by demand linked to the US midterm elections and the FIFA World Cup. Online video and OOH continue to command the highest inflation rates across all channels, while print is expected to turn deflationary for the first time since 2023.
- Per **Forrester** and **Dentsu Creative** and their “The Fixed-Fee Advantage: Unlocking Agency Value While Addressing Pricing Friction” report, one quarter of North American agencies shifted to fixed-fee pricing as agencies evolve their commercial models in the age of AI. 63% are satisfied or extremely satisfied with the approach. Among marketers not currently using fixed-fee pricing, more than half said they were interested or extremely interested in adopting the model. Key findings:
 - 1) Agencies remain trusted strategic partners through technology advancements
 - 2) Pricing models are a source of friction, not a reflection of partnership value
 - 3) Fixed-fee models simplify collaboration
 - 4) Outcome alignment remains critical to drive effectiveness. Hybrids of retainer and fixed-fee projects represent 33% of current pricing models for marketers’ agencies, followed by fixed fee per campaign or project (25%)

» NOTABLE

- Fox Sports and Telemundo are expected to more than double their advertising revenue for the **2026 FIFA World Cup**, reaching \$850 million. The global tournament will have 104 matches over 39 days (June 11–July 1) in the US, Canada, and Mexico. Major global sponsors include Visa, Coca-Cola, McDonald’s, and PepsiCo. The FIFA World Cup is expected to earn between \$2.4 billion and \$2.8 billion in deals—up 50% from the 2022 event in Qatar. Estimated total for FIFA revenue from global media rights, sponsorships, and ticket sales is estimated at \$13 billion.
- Per **COMvergence**, WPP Media topped the **global media new business rankings** during the first quarter of 2026, with \$1.5 billion in new client billings (e.g., Jaguar Land Rover, Estée Lauder, and SC Johnson North America). The agency also lost \$819 million in client revenue. Omnicom Media Group (OMG) ranked second, bringing in \$1 billion in new wins, including Delta Air Lines and Dyson, and \$1 billion in retentions. OMG lost \$430 million in client business. Publicis ranked third in the new business rankings. Bespoke client solutions accounted for 25% of the \$7 billion total reviewed media spend (or \$1.8 billion) won by one of the big three holding groups: WPP Media, Omnicom Media, and Publicis Media.

- **Omnicom** reported organic growth of 3.9% on revenue from core operations of \$5.6 billion for Q1. The firm identified assets generating annual revenue of \$3.2 billion that it hopes to dispose of by the end of the year. Integrated media operations (accounting for about 52% of company revenues) posted a percentage gain in the high-single digits. The US region was up in the mid-single digits in Q1. Integrated media is an expanded discipline resulting from the merger reorganization that includes data, commerce, and digital transformation consulting. New wins included IBM, GSK, John Deere, and Baileys, while it added business from Clorox, Dyson, Exxon, Merck, and Unilever.
- **WPP** reported first-quarter net revenue of 2.26 billion GBP (\$3.05 billion), down 6.7% on an organic basis. By business segment revenue, global integrated agencies were collectively down 7.4%, which the company attributed largely to prior-year client losses. North America declined 7.8% due largely to prior-year client losses at WPP Media and spending cuts at Ogilvy and AKQA. The firm reiterated that it expects a first-half organic revenue decline in the mid-to-high single digits for the first half of 2026. Full-year pretax profit margin is expected to be 12% to 13%. Major first-quarter wins included being named Estée Lauder's first-ever global media partner, and media assignment wins for Wendy's, SC Johnson, and Norwegian Cruise Lines in the US.
- **Dentsu** reported net revenue in Q1 of approximately \$1.86 billion, up 2.7%, with organic growth of 0.8%. Organic growth across regions: Japan, 4.7%; Americas, -3%; EMEA, 0.8%; and Asia Pacific, 7.5%. Japan accounted for 44% of the overall business in Q1, followed by Americas (26%), EMEA (22%), and APAC (8%). The firm expects organic growth from flat to 1% for full-year 2026.
- **Stagwell** reported Q1 revenue of \$704 million, an increase of 8% from the prior-year period. Q1 digital transformation had net revenue of \$97 million, an increase of 9% from the prior-year period. Q1 adjusted EBITDA grew 9% YOY, to \$90 million. Net new business brought in \$141 million in the first quarter, while the 12-month net new business was \$486 million. The group is aiming at net revenue growth of 8% to 12%.

Mergers and acquisitions (M&A) activity:

» GAME CHANGING

- **Publicis Groupe** acquired LiveRamp in a \$2.2 billion all-cash deal to position the French holding company as a leader in “agentic business transformation”—the use of AI agents to automate and collaborate on corporate workflows and to enable “data co-creation.” LiveRamp’s privacy-safe “data clean rooms” will serve as the connective tissue integrating into Publicis’ massive existing tech ecosystem. This stack already includes Epsilon (identity tracking), Publicis Sapient (enterprise digital transformation), and Marcel (internal corporate AI workflows).

» HIGH IMPACT

- Per **COMvergence**, between 2016 and 2025, there were a total of 845 acquisitions. The global holding groups remained the dominant consolidators, accounting for 47% of all deals. Management consultancies represented 24%, digital media investment firms, 6%, and other acquirers, 23%. In 2025, there were 55 deals representing over 64,000 people and \$13B in equity. Historically, Dentsu showed the most pronounced contraction, declining from 39 deals in 2016 to just one deal annually in 2024-2025. WPP followed a similar path, with strong activity in 2016-2018 followed by a sustained slowdown, reaching one deal in both 2024 and 2025. In contrast, Havas re-accelerated, peaking at 11 deals in 2025, while Publicis Groupe also returned to 11 deals in 2025, indicating renewed but targeted momentum. Omnicom remained moderate and opportunistic, whereas IPG historically stayed highly selective. A defining inflection point is the Omnicom acquisition of IPG, the largest transaction of the period. This landmark deal significantly reshaped the competitive landscape and marked a shift toward large-scale strategic consolidation, contrasting with the otherwise selective post-2020 environment.
- **Accenture Song** acquired creator and social agency Whalar in a move to strengthen the firm’s creator and social capabilities. Top clients include Amazon, HP, and Nestlé Health Sciences. Whalar Group, the agency’s parent company, will continue to operate independently and retain its remaining businesses—Sixteenth, Foam, Moby Ventures, The Lighthouse, and The Business of Creativity.

» NOTABLE

- New York City-based independent, women-owned media shop **OpAD Media**, which specializes in developing campaigns for government, higher education, legal, and public health clients, acquired creative-focused Broad Agency, with offices in New York City and Philadelphia.
- **MSQ DX** (part of MSQ) acquired Atlanta-based digital agency Arke to expand its presence in the US market. The move unites MSQ’s digital agencies 26 DX, MMT, and UDG under a single global brand, leadership, and market identity.
- **Havas** acquired US-based youth culture and experiential agency Archrival, aligning the holding company’s own specialist in the field, Havas Play in North America. Archrival creates programs that connect brands with younger audiences through sports, collegiate activations, ambassador networks, and immersive experiences. Clients include adidas, EA, YouTube, Disney, Spotify, Netflix, and Amazon.

Noteworthy quotes:

- » “A lot of the time that we’ve spent in the last year was building out our infrastructure. It’s like building a home: it can be the most beautiful thing on the outside, but if you forgot to pour the concrete foundation, the first storm is going to blow it over.” —Vinny Rinaldi, VP Consumer Connections, **The Hershey Company**
- » “The tools are real. The investment is real. The financial impact, so far, is not.” —Brian Wieser, Principal, **Madison and Wall**

- » “The agencies pouring the most money into looking forward-thinking are actually engineering themselves into the next generation of legacy tech. The ones who win won’t be the ones who built their own platform, but rather the ones who plugged into the platforms already moving faster than they ever could.” —Justin Wohlstadter, Founder and CEO, **Waldo.fyi**
- » “There are a lot of inefficiencies when you think about that marketing workflow—from briefing to creating the creative and content, and you have to create so much content today, to putting it out in the marketplace, optimizing in real time and constantly iterating to make sure that you’re driving the best outcomes.” —Lara Hood Balazs, CMO and EVP Global Marketing, **Adobe**

PRESS RELEASE



Final 2025 Global Billings & Market Share Report

Contributed by: *COMvergence*

COMvergence has released its annual Global Billings and Market Share (BMS) report, presenting **FINAL 2025** media agency and group billings figures, including digital media investments.

At the group level, WPP Media retains the top position with a 13% industry market share (down from 14.2% in 2024) and \$63.9B in global billings, stable versus 2024. Publicis Media follows, posting the highest growth among the Big 6 groups with an 12.8% rise (+\$7B), reaching \$62.4B in 2025 billings.

[Click here](#) to read the full press release.

Top 3 Global Media Agency Groups – Final 2025

Rank	Media Groups	Total Billings 2025*	Share of Digital 2025	Industry Market Shares 2025	Intra Big 6 Group Market Shares 2025	# Clients	Total Billings 2024*	Growth 2025 vs. 2024*	Growth 2025 vs. 2024
#1	WPP Media	63 858	56%	13%	27%	6 270	63 995	-138	-0,2%
#2	Publicis Media	62 441	59%	13%	26%	3 864	55 381	7 059	12,8%
#3	Omnicom Media (OMG)	48 547	60%	10%	20%	4 257	46 034	2 512	5,5%
-	Omnicom Media	75 623	58%	15,8%	31%	7 271	74 166	1 457	2,0%

*\$US M

Top 3 Global Media Agency Networks – Final 2025

Rank	Media Agencies	Owner Groups	Total Billings 2025*	Share of Digital 2025	Industry Market Shares 2025	Intra Network Market Shares 2025	# Clients	Total Billings 2024*	Growth 2025 vs. 2024	Growth 2025 vs. 2024
#1	OMD	Omnicom Media (OMG)	26 864	59%	5,6%	12,2%	2 239	26 410	454	1,7%
#2	Essence Mediacom	WPP Media	23 303	55%	4,9 %	10,6%	1 870	24 251	-948	-3,9%
#3	Mindshare	WPP Media	20 468	58%	4,3%	9,3%	1 950	21 656	-1 188	-5,5%
#4	Zenith	Publicis Media	17 202	59%	3,6%	7,8%	1 218	15 445	1 757	11,4%
#5	Starcom	Publicis Media	17 184	60%	3,6%	7,8%	1 069	15 692	1 492	9,5%

*\$US M

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.

- Lottery-led gaming entertainment group **Allwyn** selected VaynerMedia EMEA as its social creative and production AOR across Europe and North America. The agency will handle all social duties through Instagram, TikTok, Facebook, and YouTube Shorts.
- Nonalcoholic beer brand **Best Day Brewing** selected Austin, Texas-based Bakery as its integrated AOR. The agency will handle all creative and media duties including a new brand platform, omnichannel campaign, seasonal programming, and redesign packaging for its craft brew portfolio, including Imperial IPA, West Coast IPA, Hazy IPA, Kölsch, Electro-Lime and American Pilsner.
- Italian food brand **Barilla** selected consultancy Accenture Song as its social and digital AOR globally following a review. The agency will handle all social duties for the brand including its social strategy across TikTok and Instagram, trend identification, community management, and digital recipe content.
- Fitness company **Bodybar Pilates** selected Chicago independent agency Kelly Scott Madison as its integrated AOR. The agency will handle brand strategy, media planning and investment, digital marketing, and analytics across CTV, audio, social, and search.
- Beverage giant **Coca-Cola Co.** kicked off a review of its global media, data, and technology business in a move to evolve its digital-first marketing operating system for growth. The review excludes North America, where Publicis is the incumbent, and Japan and Korea, where Coca-Cola works with Dentsu. Global creative and PR disciplines are not in scope of this review and will remain with WPP Open X. Both WPP and Publicis Groupe are expected to participate. The brand hired WPP for creative, media, data, and marketing technology for its 200 or so brands, setting up a bespoke unit called Open X years prior.
- Tech company **Cosmo Technologies** selected Minneapolis-based Broadhead as its integrated AOR following a review. The agency will handle a wide range of duties including creative, performance media, social, analytics, and affiliate marketing.
- Panera Brands-owned **Caribou Coffee** selected Minneapolis-based independent Collective Measures as its media AOR in the US. The agency will handle all media planning and buying duties including full-funnel media strategy, planning, execution, and advanced analytics.
- **Cadillac Formula 1 Team** selected Excel Sports Management as its integrated partnership AOR. The agency will handle commercial sales strategy and partnership development globally across partnerships, performance, brand, and fan engagement.
- **Conagra Brands** selected Cornett as its creative/digital AOR following a review. The agency will handle media and marketing models as well as provide support for in-house media planning and buying for several brands, including Slim Jim, Banquet, Marie Callender's, and Healthy Choice. The agency will partner with indie agency Hunterblu Media in a performance-media capacity.
- Car maintenance retailer **Discount Tire** selected Havas Creative-owned agency Arnold as its creative AOR following a review. The agency will handle all creative duties, including broadcast, streaming, radio, out-of-home, social media, PR, and grassroots marketing channels, for Discount Tire and America's Tire and its +1,275 stores.
- Delivery group **Deliveroo** kicked off a review of its global media business following the platform's recent acquisition by US-based DoorDash. Incumbent Initiative is expected to defend. The agency will handle streamlining planning, measurement, and optimization across the globe. Digital creative is also in review.
- Specialty soda-shop franchise **FiiZ Drinks** selected Austin, Texas-based Proof Advertising as its creative ARO without a review. The agency will handle brand strategy, creative work across digital, social, and experiential channels for its customizable drink combinations, including flavored sodas, energy drinks, waters, and hot beverages, alongside snacks and sweet treats.
- Brazilian restaurant chain **Fogo de Chão** selected Tombras as its integrated AOR following a review. The agency will handle all media and creative duties as well as integrated, data-driven marketing for the brand and its 120 locations globally.
- **Heineken** retained Dentsu as its global media AOR following a review. The brand also consolidated its creative roster across Publicis Groupe (which handles the main Heineken brand), WPP, and Stagwell. Publicis retained global secondary production duties and, along with WPP and Stagwell, will handle creative for Heineken's Amstel, Birra Moretti, Desperados, and Tiger brands, as well as select local brands.
- **Honda Motor** selected WPP Media's EssenceMediacom as its media AOR in Europe following a review. The agency will handle a range of duties that spans Honda Motor Europe's automobile, motorcycle, marine, power products, and corporate communication divisions across 16 European markets as well as pan-European activity. A dedicated agency team will lead Honda's media strategy, planning, and activation across Europe and leverage marketing platform WPP Open.

- **Henkel Consumer Brands** selected WPP as its global creative AOR following a review. The agency will handle all creative and production globally for the brand portfolio including Persil, Schwarzkopf, and Syoss.
- **Hershey's** salty snacks selected Chicago-, Minneapolis- and Detroit-based DonerColle Partners as its creative AOR following a review. The agency will handle all creative duties for SkinnyPop Popcorn, Pirate's Booty, Dot's Homestyle Pretzels, and LesserEvil.
- Global human-rights organization **International Justice Mission** selected Los Angeles-based creative digital agency Hello Party as its lead social AOR. The agency will handle all social media duties for the organization to fight violence, human trafficking, and slavery in 19 countries.
- UK-based automaker **JLR (FKA Jaguar Land Rover)** selected WPP to handle its consolidated global "end-to-end" marketing communications including media, creative, production, customer experience, and marketing strategy for the brand's portfolio, namely Range Rover, Defender, Discovery, and Jaguar. WPP formed a bespoke, integrated and co-located team from across WPP and JLR marketing talent, which is based on an outcome-based remuneration structure that aligns WPP's success directly with JLR's growth.
- LJS Partners LLC-owned seafood restaurant chain **Long John Silver's** selected Baldwin& its creative AOR. The agency previously did project work for the brand in digital, packaging, and social for the past six years. The agency will partner with the brand's media AOR, Leap.
- Denim retailer giant **Levi's** decided to move away from a creative AOR model and three-year incumbent TBWA\Chiat\Day to a project model and relationships. The brand plans to work with several creative agencies based on project requirements.
- **L'Oréal India** selected Publicis Media as its integrated media AOR following a review, replacing 15-year incumbent Wavemaker. The move intends to accelerate its Innovation & Beauty Tech transformation leveraging data-driven insights, high-precision marketing, and innovative content integration to meet the evolving needs of the Indian consumer. The agency will handle media-related duties for the brand.
- Mattress brand **Molecule** selected Digital Natives as its strategic and creative AOR in the US following a review. The agency will handle all creative duties including brand awareness, sales generation, social, OOH, experiential, and influencer partnerships.
- Volt+Co-owned caffeine pouch brand **Mojo Energy Pouches** selected independent creative agency Walrus as its creative AOR following a review. The agency will handle brand strategy and creative development and partner with other agencies (media, PR, influencer, and social).
- **Mondelēz International** selected Stagwell's 72andSunny to handle global creative for Oreo following a review, replacing incumbent Omnicom's Martin. Along with global Oreo duties, 72andSunny will oversee US creative for Oreo and Ritz, as well as the bulk of Mondelēz's remaining US biscuits portfolio. Publicis Groupe retains local activation duties on Oreo across international markets along with global biscuits.
- Tech giant **Microsoft** selected Accenture Song's Droga5 as its creative AOR for Copilot, replacing incumbent Panay Films. The agency has been doing project work for the brand in recent months. Accenture also announced that it will roll out Copilot across its 743,000-strong workforce, the largest enterprise Copilot deployment to date.
- Brazilian beauty and personal care brand **Natura** selected WPP as its integrated AOR as part of a consolidation exercise in LATAM following a review. The agency, led by VML and WPP Media, with contributions from other WPP agencies, all connected by WPP's agentic marketing platform, WPP Open, will handle media, creative, and production for the brand and Avon in Latin America.

REPORT

Agency Reset Addendum Q1 2026: The Control Shift

Contributed by: Piscari

This Q1 Addendum captures what has changed in the three months since The Agency Reset 2026 Report publication from Piscari, and what those changes mean for agency leaders, clients, procurement teams and investors.







Click here to read the full report.



- **Organic Valley**, a cooperative owned by more than 1,500 organic family farms, selected TDA Boulder as its creative AOR following a review. The agency will handle brand strategy and creative development for the brand across 84 dairy products, including CTV, online video, social, digital, print, and shopper marketing.
- **Olive Oils From Spain** selected Havas Miami as its creative AOR in the US following a review. The agency will handle creative and strategy, as well as creator and influencer marketing, social media, earned media, out-of-home, experiential activations, and cultural partnerships in close partnership with Havas Media Miami leading media.
- Retailer **PetSmart** kicked off a review of its creative and media account. Incumbent Deutsch (creative) and Empower Media (media) are expected to defend.
- Campbell's-owned pasta sauce brand **Rao's Homemade** selected independent Goodby Silverstein & Partners as its creative AOR. The agency will handle all creative duties including expanding its cultural relevance across media, storytelling, and brand experiences.
- **Rude Health**, an Oddlygood Group-owned nondairy food and drink brand, selected London-based Ark Agency as its strategic and creative AOR in the UK following a review. The agency will handle a new strategic direction for the brand and a new communication platform for its advertising campaign.
- **Subway** kicked off a review of its creative business in the US. Incumbent Leo New York is expected to defend the account that includes creative and social duties. The brand selected Omnicom as its media AOR in the US (and also includes CRM), replacing incumbent Dentsu's Carat.
- Suncare brand **Supergoop!** selected January Digital as its media AOR as part of a consolidation. The agency will handle media across direct-to-consumer, retail, and marketplace channels, as well as paid social, search, CTV, video, and Amazon and retail media channels.
- Rentokil Initial-owned **Terminix** selected New York-based Kepler as its media AOR, replacing incumbent Omnicom Mediahub. The agency will handle upper- and mid-funnel media planning and buying combined with an integrated, data-driven approach to building awareness and driving demand as well as using advanced analytics, audience strategy, and integrated media planning.
- Mosquito repellents manufacturer **Thermacell** selected Born Social as its social AOR in the US. The agency will handle brand building, sales activation, performance creative, influencer strategy, and social-first campaign development.
- The **US Navy** kicked off a review of its integrated advertising account for a new one-year advertising recruitment contract. Eleven-year incumbent WPP's VML is expected to defend. The agency will handle creative, media, strategy, research, field marketing, and more.
- **Wright-Patt Credit Union**, Inc selected Denver-based Cactus as its integrated AOR following a review. The agency will handle brand strategy and positioning, campaigns across TV, video, radio, out-of-home, social, display, and search, as well as media planning and buying.
- Automotive floor mats company **WeatherTech** selected Chicago-based independent Cramer-Krasselt as its integrated AOR following a review, replacing 17-year incumbent Pinnacle Advertising. The agency will handle all creative, strategy and media duties for the brand.

Agency roster summary:

IP= Review in progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Allwyn	unk	Social Creative/Production AOR	Europe, North America	VaynerMedia EMEA	unk
	Barilla	unk	Social/Digital AOR	Global	Accenture Song	Y
	Best Day Brewing	none	Integrated AOR	North America	Bakery	unk
	Bodybar Pilates	unk	Integrated AOR	US	Kelly Scott Madison	unk
	Cadillac Formula 1 Team	unk	Integrated Partnership AOR	Global	Excel Sports Management	unk
	Caribou Coffee	unk	Media AOR	US	Collective Measures	unk

Agency roster summary:

IP= Review in progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
 THE Coca-Cola COMPANY	Coca-Cola Co.	unk	Media, Data, and Technology	Global (excluding North America, Japan, and Korea)	unk	IP
	Conagra Brands	unk	Creative/Digital AOR	North America	Cornett	Y
	Cosmo Technologies	unk	Integrated AOR	North America	BroadHead	Y
	Deliveroo	Initiative (expected to defend)	Media	Global	unk	IP
	Discount Tire	unk	Creative AOR	US	Arnold	Y
	FiiZ Drinks	unk	Creative AOR	US	Proof Advertising	N
FOGO DE CHÃO	Fogo de Chão	unk	Integrated AOR	Global	Tombras	Y
	Heineken	Dentsu (retains duties)	Media AOR	Global	Dentsu	Y
	Heineken (Amstel, Birra Moretti, Desperados, Tiger)	Publicis	Creative	unk	Publicis (consolidation), WPP, Stagwell	unk
	Henkel Consumer Brands	WPP	Creative AOR	Global	WPP (expanding duties)	Y
	Hershey's	unk	Creative AOR	unk	DonerColle Partners	Y
HONDA	Honda Motor Co.	unk	Media AOR	Europe	Essence Mediacom	Y
	International Justice Mission	unk	Social AOR	Global	Hello Party	unk
	JLR (FKA Jaguar Land Rover)	unk	"End-to-end" Marketing Communications	Global	WPP	unk
	L'Oréal India	Wavemaker	Integrated Media AOR	India	Publicis Media	Y
	Levi's	TBWA\Chiat\Day	Creative	Global	Various Agencies (project-based model)	unk
	Long John Silver's	Baldwin& (project based)	Creative AOR	US	Baldwin& (expanding duties)	unk
	Microsoft (Copilot)	Panay Films	Creative AOR	unk	Droga5	unk

Agency roster summary:

IP= Review in progress, Unk= Unknown

COMPANY LOGO	CLIENT	INCUMBENT	CHANGE/SCOPE	FOCUS AREA	NEW AGENCY	REVIEW?
	Mojo Energy Pouches	<i>unk</i>	Creative AOR	US	Walrus	Y
	Molecule	<i>unk</i>	Creative and Strategic AOR	US	Digital Natives	Y
	Mondelēz International	Omnicom's Martin	Creative	Global	72andSunny	Y
	Natura	WPP	Integrated AOR	LATAM	WPP (consolidation)	Y
	Olive Oils From Spain	<i>unk</i>	Creative AOR	US	Havas Miami	Y
	Organic Valley	<i>unk</i>	Creative AOR	US	TDA Boulder	Y
	PetSmart	Deutsch (expected to defend)	Creative	North America	<i>unk</i>	IP
	PetSmart	Empower Media (expected to defend)	Media	North America	<i>unk</i>	IP
	Rao's Homemade	<i>unk</i>	Creative AOR	North America	Goodby Silverstein & Partners	<i>unk</i>
	Rude Health	<i>unk</i>	Strategic/Creative AOR	UK	Ark Agency	Y
	Subway	Leo New York (expected to defend)	Creative	US	<i>unk</i>	IP
	Subway	Dentu's Carat	Media AOR (including CRM)	US	Omnicom	Y
	Supergoop!	January Digital	Media AOR	<i>unk</i>	January Digital (consolidation)	N
	Terminix	Omnicom MediaHub	Media AOR	<i>unk</i>	Kepler	Y
	Thermacell	<i>unk</i>	Social AOR	US	Born Social	<i>unk</i>
	US Navy	WPP VML (expected to defend)	Integrated Advertising	US	<i>unk</i>	IP
	WeatherTech	Pinnacle Advertising	Integrated AOR	Global	Cramer-Krasselt	Y
	Wright-Patt Credit Union	<i>unk</i>	Integrated AOR	North America	Cactus	Y

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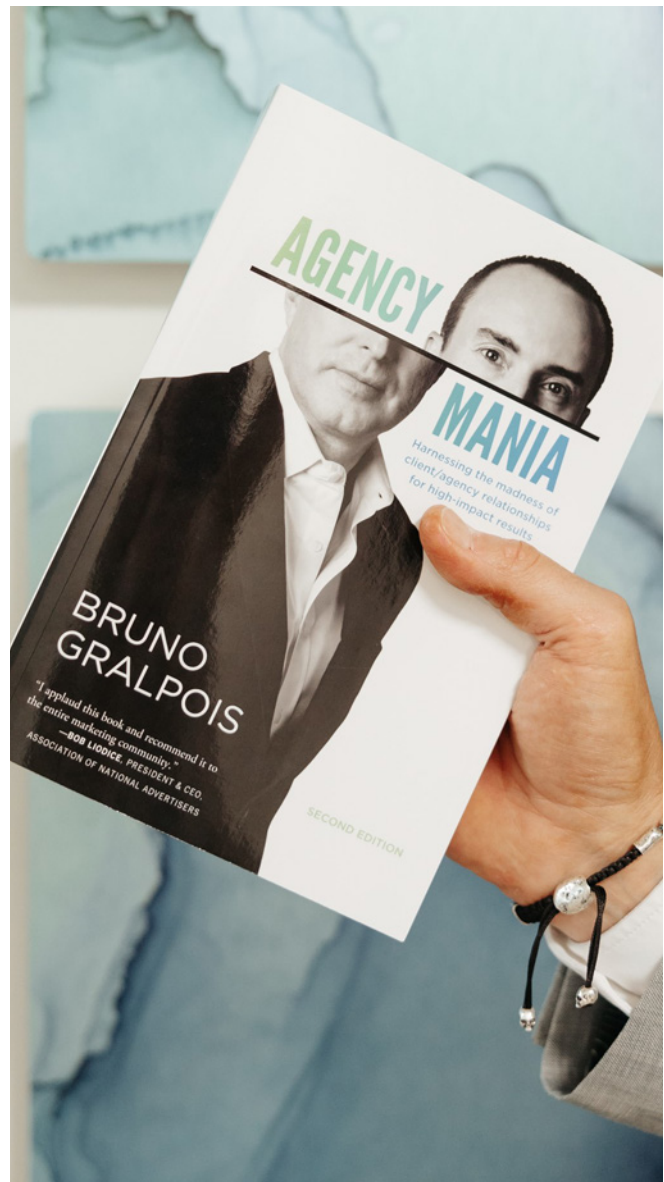


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Agency Mania 2nd Edition is also available at many major bookstores, including Amazon.com, Barnes & Noble, Target, and other retailers.



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

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

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



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