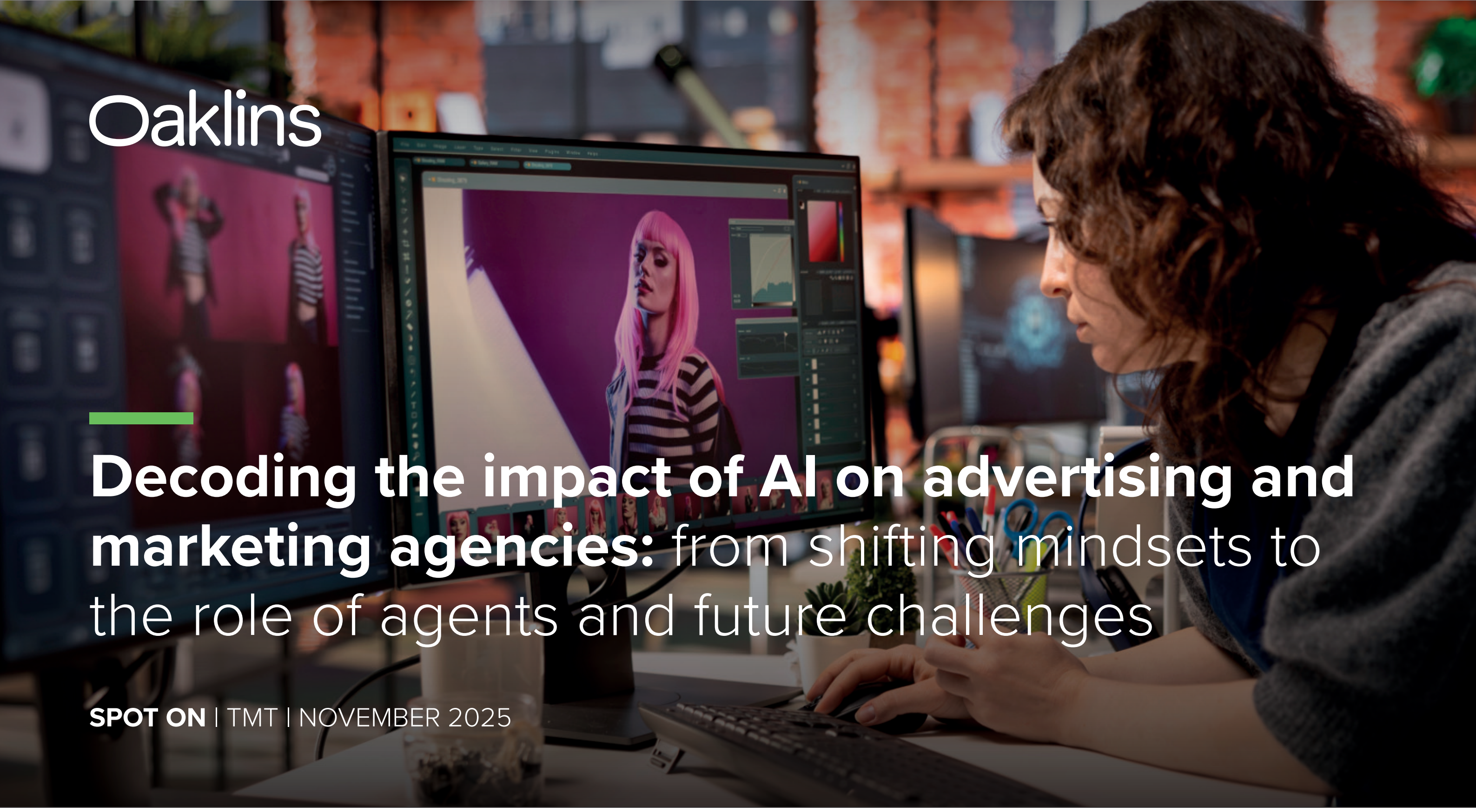


Oaklins

Decoding the impact of AI on advertising and marketing agencies: from shifting mindsets to the role of agents and future challenges

SPOT ON | TMT | NOVEMBER 2025

CONTINUING OUR SERIES OF TMT WEBINARS, WE TURN OUR FOCUS TO ADVERTISING AND MARKETING

If there is any subject currently occupying businesses and investors alike, it's AI, as the reach and capabilities of this technology continue to expand and intensify at breakneck speed.

AI is making its presence felt in all sectors and geographies; at advertising and marketing agencies impacted in multiple ways, with workflows, solutions and client relationships all feeling the touch of its power.

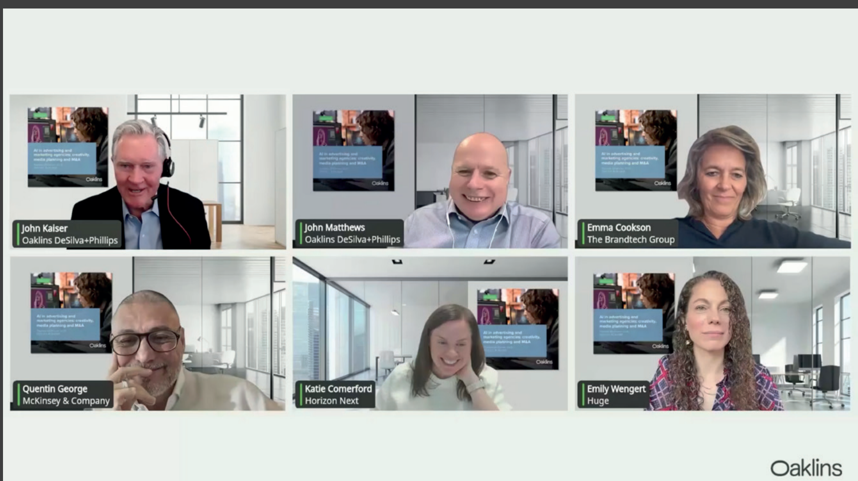
In this session (October 2025), Oaklins turned its attention to this field in the third of its TMT-focused webinars, where a prestigious panel of experts and thought leaders came together to share their experiences and predictions.

What we covered:

- How AI is transforming creative development, media planning & buying, and measurement
- The rise of agentic AI and what it means for workflows, governance, and value creation
- Practical playbooks for readiness (toolset, skillset, mindset) and change management
- Where M&A is accelerating AI adoption across the agency landscape

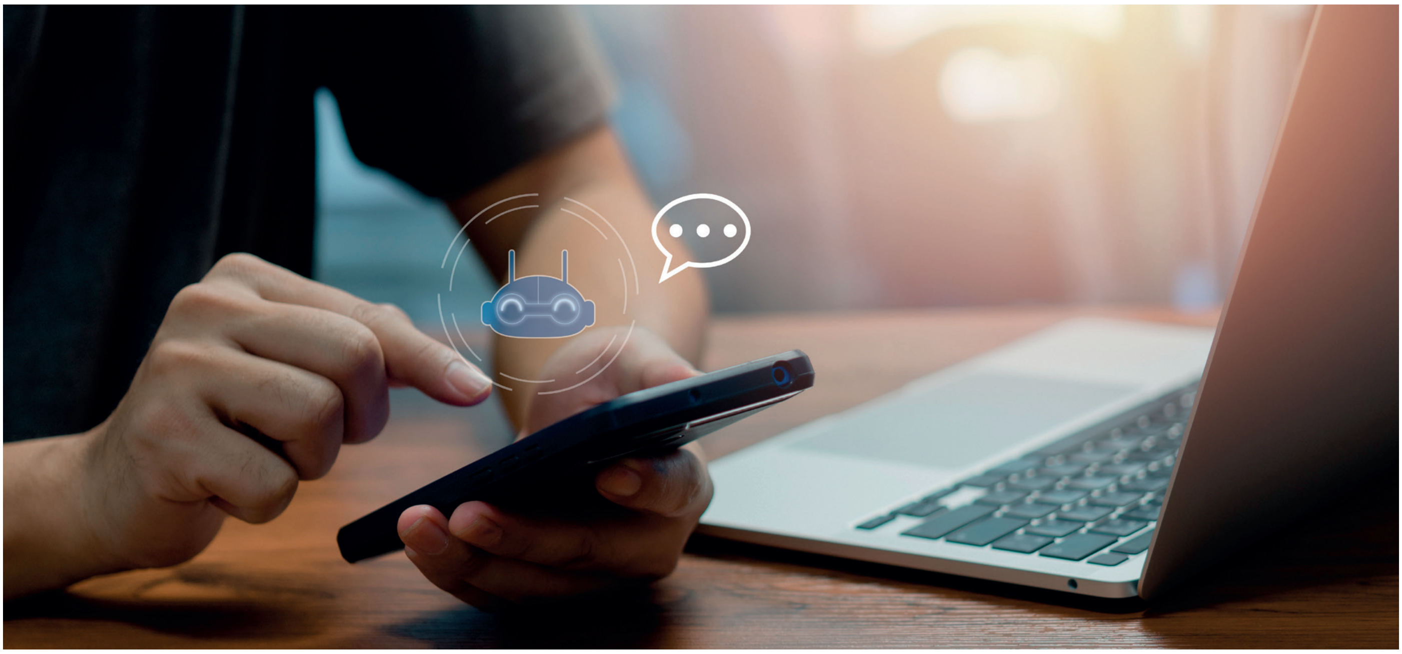
Read on for some of the session's highlights, and to watch the full webinar, click here.

Our TMT webinar panel



Clockwise from top left:

John Kaiser (Partner, Oaklins DeSilva+Phillips), **John Matthews** (Senior Advisor, Oaklins DeSilva+Phillips), **Emma Cookson** (Partner & Co-Chief Client Officer, The Brandtech Group), **Emily Wengert** (Managing Director & Global Head of AI Strategy, Huge), **Katie Comerford** (EVP & Chief of Strategy and Operations, Horizon Next) and **Quentin George** (Partner and Global Leader: Advertising & Commerce Media Practice, McKinsey).



JOHN KAISER
Partner
Oaklins DeSilva+Phillips

In numbers

- **10,000** AI tools worldwide
- **500–1,000** AI startups launched each year
- global AI spending is projected to be **US$1.5 trillion** this year, with big tech accounting for about **US$400 billion** in infrastructure
- through October 2025, VC firms have invested nearly **US$200 billion** in AI startups — equaling about half of all VC spending globally and 64% of VC investments in the USA

"There have been a considerable number of transactions recently, many focused on sectors or tasks, commerce, media buying, creative and ad optimization, and influencer marketing. What I find particularly noteworthy is that AI transaction activity is setting new records for the shortest time frame from launch to exit, as well as for company valuations."

Despite the many benefits of AI, there are of course **challenges to be considered in advertising and marketing:**

- trust and transparency
- alignment with brand values
- rethinking agency workflows and existing processes
- ensuring agency personnel are AI fluent
- client relationships

Host John Kaiser, a partner at Oaklins DeSilva+Phillips in New York City and head of its advertising and marketing services team, kicked off with an overview of AI today. "Artificial intelligence is reshaping the advertising and marketing industry in ways more profound than anything we've seen before. It's not just a new technology. AI is a fundamental shift in how agencies create, target and measure campaigns."

> "90% of marketers use AI, but 40–50% admit they don't know how to extract maximum value from it."
>
> **– John Kaiser**

Three key ways in which the AI revolution is impacting businesses in this sector:

- campaign optimization
- creative development and production
- personalization

> "AI is going to reshape every industry and every job."
>
> **REID HOFFMAN**
> CO-FOUNDER OF LINKEDIN
> PARTNER, GREYLOCK PARTNERS, MANAS AI

MEET THE PANEL — OPENING INSIGHTS

Emily Wengert, managing director and global head of AI strategy at design and technology agency Huge.

"AI is in our conversations, our workflows and our tools. It's in our solutions as well, meaning that we're putting AI not just into the marketer's hands but in some cases, into those of our end consumers — that's where I get the most excited. There's been a lot of transition in the last year coming from our clients, from hesitancy to being more embracing. They understand that it requires experimentation. Huge is really focused on intelligent experiences — we are using the latest technology, especially generative AI, to bring intelligence into everything we do. A great example is the AI search experience we did for the Olympics last year which enabled people to find precise information about the programming."

Emma Cookson, partner and co-chief client officer at The Brandtech Group.

"We're a relatively new organization, 10 years old, and we've been focused on our genAI capability since day one. At the heart of The Brandtech Group is our proprietary genAI platform, Pencil — it aggregates all the leading foundational models relevant to marketers. We deploy the platform and provide service elements to scale it, where necessary, for a lot of big global companies: Google's own marketing teams use Pencil, and other key clients include Unilever, Diageo and L'Oreal."

Katie Comerford, EVP and chief of strategy and operations at Horizon Next.

"AI is powering everything that we're doing and the pivots we're making, taking a data-first strategy and empowering everyone within the company to have the access and speed to use AI. We're also shifting the way we're talking to and thinking about our audiences. On the operations side, it's about how we bring these solutions to take away those monotonous tasks that take up too much time. What's been exciting recently is we're shifting from being just a media agency to having products in our back pocket, such as Blu, our connected marketing platform. The past five years have been exciting but the last six months have felt gas-powered in what we're doing with AI."

Quentin George, partner and global leader for advertising & commerce media practice for McKinsey.

"We advise companies across the entire advertising and marketing value chain, and while it's fine to have interesting consumer-based demos that make for good slideware and comparisons, for us, the real work, excitement and business value is in the bowels of an agency, in areas like billing, forecasting and resource management. Not many people really understand the potential for disruption and for business value, we've seen that manifest in the last six months. As we have these conversations about the impact of AI, I'd encourage us all to imagine it through the entire life cycle of the agency and the holding company ecosystem."

EMILY WENGERT
Managing Director &
Global Head of AI Strategy, Huge

KATIE COMERFORD
EVP & Chief of Strategy and
Operations, Horizon Next

EMMA COOKSON
Partner & Co-Chief Client Officer,
The Brandtech Group

QUENTIN GEORGE
Global Leader on Advertising
& Commerce Media Practice,
McKinsey

> "People underestimate how AI will transform business in the short term, and underestimate what it's capable of in the long term."
>
> **– Quentin George**

PUTTING AI INTO PRACTICE

Moderator John Matthews, senior advisor and AI Specialist at Oaklins DeSilva+Phillips, asked the panelists to provide more details regarding their AI experiences, insights and lessons learned, especially regarding the marketing services ecosystem. **Quentin George:** "Companies come to us for AI transformation, and we have

JOHN MATTHEWS
Senior Advisor
Oaklins DeSilva+Phillips

had to transform ourselves in small and significant ways. Despite talk around tool and skill sets, it really does start with the mindset. As such, I now meet a technical assistant once a week to discuss how I approach my workflow and what can be done to support it. So, we have agents that read all my trade publications and produce a 15-minute podcast for me every day, so I don't have to go and read the headlines of every publication that I've subscribed to. Agents help me with preparing and collating documents for performance reviews. There are agents we've written that help me with preparing all the materials I have for expense management."

Katie Comerford: "Blu is our connected marketing platform that is basically the foundation of our entire process. It starts with mining both the open web and internal thought leadership information briefings to create an ecosystem that's unique to each client and allows us to understand their business situation. From there, it's possible to create a media strategy that's actually people first. The evolution of that is in thinking about what tech and tools they can bring in, and how partners can sit on top of the Blu platform and bring in their tech solutions that change the game."

Emma Cookson: "Pencil is a platform that's existed since 2018 — prehistoric times in the world of generative AI! — and it was essentially built to use the power of genAI to create assets, social ads initially and now everything: social ads, e-commerce assets, email, etc. What we're doing is scaling that capability for all our clients. The quantifiable efficiency benefits are quite extraordinary, and the effectiveness improvements are going to get more and more interesting. In the first quarter of 2025, just for three big clients, we generated nearly 240,000 assets that went live in the market, and we did so over 60% cheaper, 55% faster and 40% better in market performance."

Emily Wengert: "We got really lucky when ChatGPT went public as we'd already spent three years deeply investing in a data platform, called Live, which is really focused on scraping the web. We're looking at how we can think about journeys in entirely new ways, so we do a lot of work where we're trying to connect the external data of behavior, belief systems and triggers to try to understand how our clients' brands are being understood in real time, and then converting that into what we call intelligent twins. The hardest part with data is that it's so technical it doesn't always actually communicate well. A lot of our work in Live is translating that, generating the story of the journey, so that everyone in the marketing organization can understand it better."

HOW ORGANIZATIONS CAN GET READY FOR AI

- forget about future-proofing, you can't keep the future out
- be willing to flex, adjust and evolve
- manage transformation on three fronts: tool set, skill set, mindset
- avoid being locked into one provider; no one can place the bets right in this space, so it's necessary to be open
- constant training is essential, along with a positive attitude towards selfteaching, curiosity

KEY TREND IN 2025: AGENTIC AI/AI AGENTS

Emma Cookson: "Our AI platform, Pencil, has been completely rebuilt to be agentic across all its workflows over the last two months. The user experience now starts with a set of agents that you might want to use, or the ability to build or import your own agents. You have to know the current workflow inside out, and then you build agents for each stage of it to essentially replicate what is done in automated format."

Emily Wengert: "Just yesterday, I got a 55-page report that had been done in two hours that was a complete content audit of a client's site that we're going to be working with. One guy made the agent. He figured out how to do it, then guided the agent to be looking at and focusing in on the things he felt were the most important."

Quentin George: "Once you start to understand that agents should only have access to certain types of information, you have to consider things like authentication and creating on and off buttons for them. Imagine if there's an agent that does automatic check payments, and it's writing checks to the wrong people. That is a horror story in the making."

Katie Comerford: "Our motto for the past months has been train, provide access and drive curiosity. We've trained folks on how to use everything, understand how to talk to the agents, understand what agentic AI is and how it's evolving our landscape."

> "This is a completely holistic disruption of all aspects of marketing and advertising."
> **– Emma Cookson**

LOOKING AHEAD

What could happen in the next two years to the agency industry and ecosystem, what AI developments might happen and which other trends could change the sector?

- we won't be delivering the same things we have been
- the ecosystem will include a lot of purely or primarily AI-based startups and new players
- our clients, the brands, will market not just to people but also to machines, to the LLMs, and via agents
- change management around AI to handle the people and process side will emerge as a sector in itself in order to achieve successful AI transformations
- a tremendous amount of innovation and consumer behavior and value is going to be created
- AI will be the core of our consumer apps-value propositions will be reimagined across the value chain

"We've seen evolution over and over, and every single time we were told this was going to reduce jobs, but ultimately it changes them. As long as people are curious, we can evolve people's jobs and skill sets."
– Katie Comerford

Q&A

What has your experience been with learning how to use LLMs most productively, realizing where their weaknesses are and building on their strengths?

Quentin George: "Today is the worst version of LLMs we'll ever use. Every day from here on, it gets better. We're going from annual and six-month cycles in terms of innovation to days and weeks. We're still in the early days of understanding them, and their complexities. And if you're training these LLMs, who gets rights and attribution? Who should get payment associated with that? Those are meaningful and substantive dialogues we need to be able to have."

Emma Cookson: "I think, with a few rare exceptions, there's always going to be a human in the loop. Agents can do quality control and checking and everything, but at the end of the day, for the big, complicated things, there should always be humans in the loop."

Emily Wengert: "From a personal perspective, when I use these tools, I'm always looking out for the numbers to be wrong. I just find numbers is where the LLMs have some real challenges. If it's doing its own dynamic math, I want to see the work. The best solutions are hybrid, meaning we don't have to make generative AI do everything."

Katie Comerford: "I work closely with the product team on how to consistently provide the training of the tools, agents and LLMs that we're building based off the data, and the human element still has to be a component within all of this. The way human behavior changes is not going to always be immediately picked up on, and retraining and rethinking is something we have to keep an eye on. We have to be mindful of what we're empowering and how are we regulating ourselves."

Stay tuned for details of our next TMT webinar on the subject of legaltech!

Our track record

Our clients rely on us to help them prepare for their next challenge, whatever it may be. With deep-rooted sector expertise in TMT, we are able to support you and provide the professional advice required to achieve a successful outcome.

Some of our recent deals completed in the TMT sector include:

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has been acquired by

bounteous
A portfolio company of
MOUNTAINGATE CAPITAL

M&A SELL-SIDE

Private Equity/TMT

BURRELL

has been acquired by

FULCRUM FUNDS
and
Channing Johnson

M&A SELL-SIDE

Private Equity/TMT

CSI DMC
Destination & Event Management

has merged with

360 destination group
BUILT AROUND YOU
facilitated through a strategic investment by
H.I.G. CAPITAL

M&A SELL-SIDE

Business Support Services/TMT

helixa

has been acquired by

telmar
A portfolio company of
Boathouse

M&A SELL-SIDE

Private Equity/TMT

Propper Daley

has been acquired by

Bully Pulpit International
a portfolio company of
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M&A SELL-SIDE

TMT

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has been acquired by

Capgemini

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SAHAR

has acquired

M&A BUY-SIDE

Private Equity/TMT

WONDERSAUCE

has been acquired by

project
WORLDWIDE : CREATIVITY

M&A SELL-SIDE

TMT

Xomnia

attracts investor

FOREMAN CAPITAL

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- Growth equity and equity capital markets advisory
- Debt advisory
- Corporate finance services

TMT is one of our focus areas. Combining comprehensive sector knowledge with global execution has led Oaklins to become one of the most experienced M&A advisors in the TMT sector, with a large network of relevant market players worldwide. This results in the best possible merger, acquisition and divestment opportunities for TMT companies.

If mergers, acquisitions, or divestitures of businesses or business units are part of your strategy, we would welcome the opportunity to exchange ideas with you.

JOHN MATTHEWS

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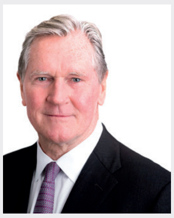
John has more than 10 years of investment banking experience advising sell-side and buy-side middle-market clients on M&A transactions. Notable AI-related transactions include the sale of Admeta to WideOrbit, and the sale of Helixa to Telmar.



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John has extensive experience in advertising and marketing, having served in senior-level operational roles in the industry and through M&A transactions at Oaklins DeSilva+Phillips. Applying his industry knowledge and relationships to M&A since joining the firm in 2010, he has facilitated transactions across an array of companies, including digital agencies, advertising agencies, design firms, production studios, consultancies, adtech, mobile, social media and project management firms. Some notable transactions include the sales of Purpose, a social impact agency, to Capgemini; Archer, a digital UX agency, to Bounteous; Harbor Picture Company, a global feature film, TV series and commercial studio, to Publicis; and Seramount, a leading provider of DE&I services, to EAB.

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