

CANNES 2025 TAKEAWAYS

Overview

INSIGHTS



APPENDIX



London

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Sam Cravey

Analyst



SECTION 02.

INSIGHTS & MARKET UPDATE

CANNES 2025 WRAP-UP

1 PLATFORMS HAVE CHARTED THEIR VISION FOR AN AI FUTURE



2 CREATORS & INFLUENCER AT THE CENTER OF MARKETER STRATEGIES



3 AI SEARCH DRIVING A TRANSFORMATION IN ORGANIC DISCOVERY



4 [TBD]



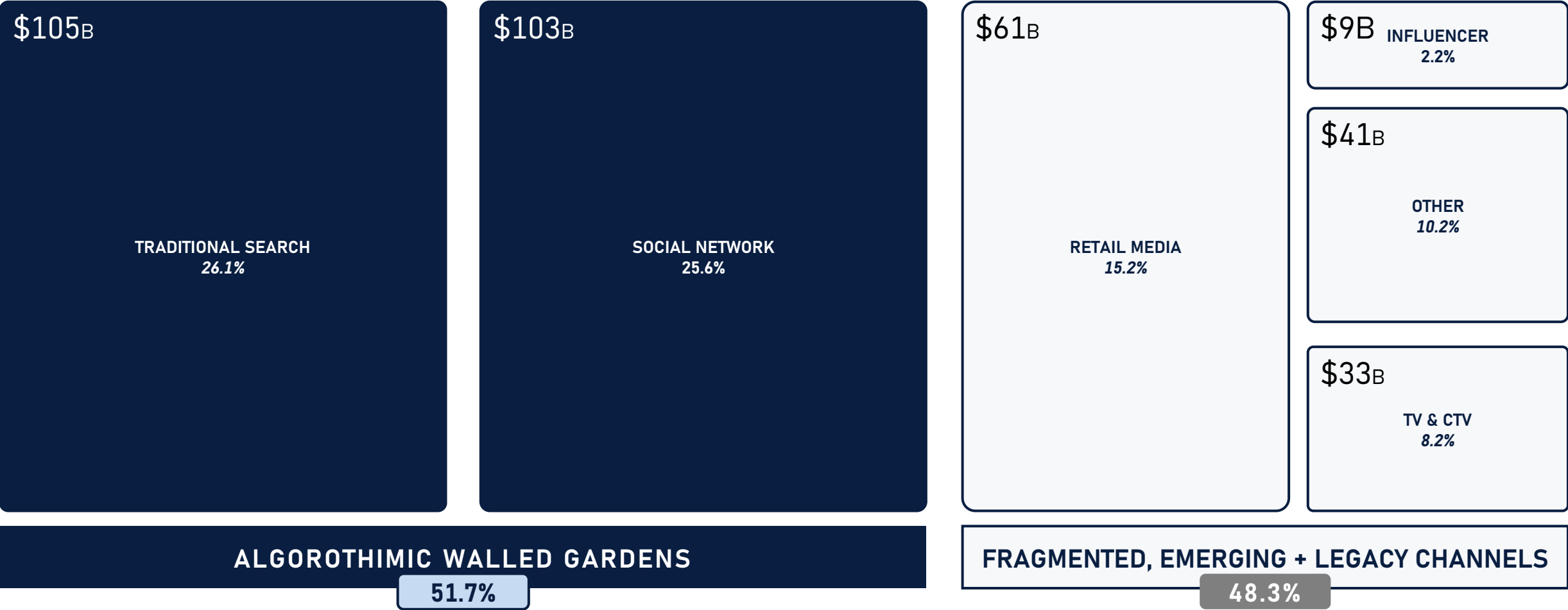
5 [TBD]

6 [TBD]

+50% OF US MEDIA SPEND SUBJECT TO BLACKBOX AUTOMATION

PLATFORMS ARE AUTOMATING MEDIA PLANNING & BUYING, TARGETING END-TO-END CREATIVE AUTOMATION

US AD SPENDING 2025E (TOTAL \$402B) ⁽¹⁾



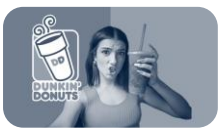
MARKETERS DEFINING A NEW ERA IN A SOCIAL-FIRST WORLD

AS INFLUENCER BUDGETS SCALE, CAMPAIGNS ARE DRIVEN BY TECHNOLOGY, ACCESS, AND CREATIVITY



VIRALITY

Deep relationships and undefined creativity



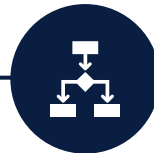




VOLUME

Scale and speed through tech-enabled services





VARIETY

Unifying fragmented audiences across breadth of interests





VELOCITY

Enabling standardization and access



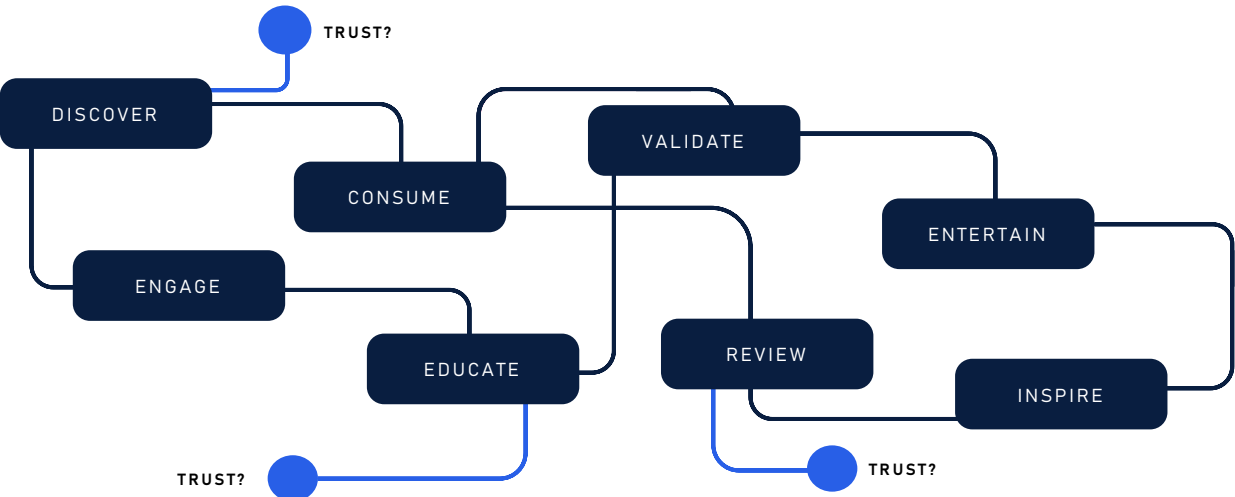
CROSS-CHANNEL MEASURABILITY

PHARUS

P6

A TRANSFORMATIONAL SHIFT IN SEARCH

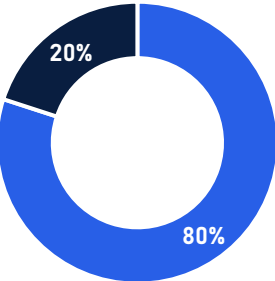
THE MODERN CUSTOMER JOURNEY



ARTIFICIAL INTELLIGENCE

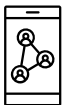


- Using
- Not quite

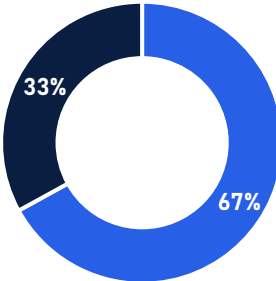


% of Search Users Relying on AI Summaries at Least 40% of the Time ⁽¹⁾

SOCIAL



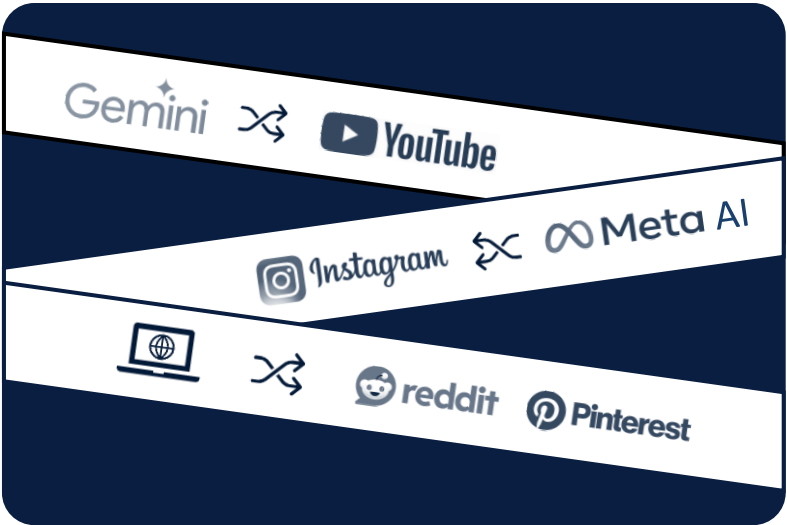
- Adopters
- Not yet



% Social Media Users Driven by Social in their Purchase Decisions ⁽²⁾

SOCIAL IS POSITIONED TO BE THE ENGINE THAT DRIVES SEARCH

PLATFORMS AS AI SEARCH HUBS



10-20%
Budget shift ⁽³⁾

Marketers are shifting budget from paid search to social platforms given shifts in consumer discovery behavior

Source: Bain & Co. ⁽¹⁾, YouGov ⁽²⁾, Digiday ⁽³⁾

TRANSITIONING FROM AN SEO WORLD TO AN AEO WORLD

BEING WORKSHOPPED

[TBD]

	Optimization for SEO	Optimization for SEO & GEO		Optimization for GEO
Technical Optimization	• Core Web Vitals	• Broken links & backlinks • Robots.txt • Metadata	• Sitemap • Canonicals & hreflang • Structured data	• Semantic HTML • TTFB optimization • (Hms.txt) • Server-side rendering • AI Bots access to content • Og & X metadata • Content/Data via API-first & Agent2Agent
1 st party Content Optimization	• Non-branded keywords	• Content refresh • Topic Clusters	• FAQ modules • Featured snippets • Breadcrumbs	• Intent matching • Long-tail keywords & content enrichment • Conversational queries • Natural language queries • Approved & Authoritative Brand & Product-specific content
3 rd party Content Optimization		• Backlinks generation		• Digital PR and authoritative mentions • Communities and Forums: quora, reddit, etc. • Open Source: Github stars and forks • Wikipedia Presence • Social Media Presence

APPENDIX

APPENDIX

MARKETING SERVICES SPECIALISTS

WHY WE ARE DIFFERENT

200+

Ongoing Relationships with Marketing Services Investors & Acquirers

20+

Years of Experience within the Marketing Services Sector

SELECTED RELEVANT TRANSACTIONS:

Signiant Received Growth Equity from Battery Ventures Media Technology Software JAN 2025 ↓ signiant Battery	Brilliant Received Investment from New Heritage Capital Corporate Gifting Platform JUL 2024 ↓ brilliant NEW HERITAGE CAPITAL	Her Campus Media was Recapitalized by SFM The #1 Gen-Z Media & Marketing Ecosystem JUN 2024 ↓ HER CAMPUS MEDIA SOROS	Blokur Acquired by Music Reports Music Data and Licensing Platform JAN 2024 ↓ blokur Music Reports	P97 Received Investment from Portage Ventures Mobile Commerce Software MAR 2023 ↓ P97 Portage
Obviously Acquired by WPP; Joins VML Tech-Enabled Influencer Marketing Agency MAR 2023 ↓ obviously WPP	Velir Acquires Brooklyn Data Co. Data-driven Experience Agency Crafting Marketing Strategy MAR 2023 ↓ velir BROOKLYN DATA CO.	Ewave Acquired by Globant Digital Media B2B Infrastructure Software NOV 2022 ↓ EWAVE Globant	Pentalog Acquired by Globant Leading Digital Transformation Agency JUL 2022 ↓ Pentalog Globant	kyu Acquires SYLVAIN Strategy and Design Consultancy MAY 2022 ↓ SYLVAIN kyu
NTT Data Acquires Vectorform Proprietary Platform Creating Digital Products and Better CX MAR 2022 ↓ Vectorform NTT DATA	Village Marketing Acquired by WPP Performance-Driven Influencer Marketing Agency FEB 2022 ↓ Village WPP	Waeg Acquired by IBM B2B Commerce MAY 2021 ↓ waeg IBM	Bow & Arrow Acquired by Accenture UK-based Digital Ventures Consultancy OCT 2019 ↓ Bow&Arrow accenture	W12 Studios Acquired by Tata Award-winning Cross-Platform Digital Design Agency NOV 2018 ↓ W12 Studios tcs TATA CONSULTANCY SERVICES