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THE AGENCY · MARKET DATA

QUARTERLY BRIEF · Q2 2026 · 

# Agency market data.

The Agency's quarterly read of the creative/tech/AI agency economy. **Live rate data across 24 category × tier cells.** Vendor-count benchmarks. **The integrated-vs-fragmented outcome delta.** Open access. Cited freely.

The Agency Research · **The market desk**

# The quarter, in numbers.

Five headline metrics. Each one tells you something different about where the agency economy is heading.

| +34% | 7.2 | 2.4× | 24% | $42K |
|---|---|---|---|---|
| AI-DISCIPLINE DEMAND YOY | AVG VENDOR COUNT, $5-50M ARR | POD VS. MULTI-VENDOR OUTCOME DELTA | STRATEGY-CONSULTING IMPLEMENTATION RATE | MEDIAN MONTHLY OPERATING-PARTNER RETAINER |

The Q2 2026 headline: **operating-partner engagements grew 56% YoY** while traditional single-discipline agency engagements grew 4% on the same denominator. **The market is consolidating around integrated delivery.** Companies that historically bought from McKinsey-class strategy and Pentagram-class brand are increasingly buying from operating-partner firms that integrate strategy + brand + build + ship.

> **What changed this quarter.** AI & Automation as a discipline crossed 25% of total engagement hours for the first time. Two years ago it was 4%. **The AI discipline is no longer a specialty — it's table stakes.** Agencies without AI fluency are losing engagements to integrated partners that bake it into every discipline.

# Rate ladders.

Q2 2026 live rate data across the 9 disciplines × project / retainer / fractional models. Sampled from 1,200 engagement intake conversations.

## Project pricing — fixed-scope deliverables

| DISCIPLINE / DELIVERABLE | MID-TIER | PREMIUM TIER | TOP-DECILE (FIRMS-OF-NOTE) |
|---|---|---|---|
| **Brand identity (full system)** | $45-90K | $120-280K | **$400K-$2M (Pentagram-class)** |
| **Website (marketing, custom)** | $40-85K | $95-185K | **$220-450K** |
| **Brand film (commercial)** | $25-65K | $80-180K | **$220-650K** |
| **AI workflow design (8-week)** | $35-65K | $80-150K | **$180-380K** |
| **Naming + positioning sprint** | $22-45K | $55-110K | **$140-320K** |

## Retainer pricing — monthly embedded work

| ENGAGEMENT | POD SIZE | MID-TIER $/MO | PREMIUM $/MO |
|---|---|---|---|
| **Brand + content (ongoing)** | 3-4 people | $18-35K | $45-85K |
| **Embedded growth pod** | 3-5 people | $25-55K | $65-120K |
| **Operating-partner pod** | 5-7 people | **$42-95K** | **$125-250K** |
| **AI transformation pod** | 3-4 people | $32-60K | $75-145K |

## Fractional — CXO-level

| ROLE | DAYS/WK | MID-TIER $/MO | PREMIUM $/MO |
|---|---|---|---|
| **Fractional CMO** | 1.5-2 | $14-28K | $32-58K |

| ROLE | DAYS/WK | MID-TIER $/MO | PREMIUM $/MO |
|---|---|---|---|
| **Fractional COO** | 2-2.5 | $18-38K | $42-72K |
| **Fractional CTO** | 2-3 | $22-45K | $50-85K |
| **Fractional CFO** | 1-1.5 | $12-22K | $28-48K |

# Integrated vs. fragmented.

What the same scope costs and ships at, integrated under one team vs. spread across multiple specialty firms.

| SAME SCOPE | MULTI-VENDOR STACK | THE AGENCY (POD) | TIME-TO-SHIP | OUTCOME DELTA |
|---|---|---|---|---|
| **Brand + site + launch content** | $220K (3 vendors) | **$165K (1 pod)** | 5 mo vs. 12 mo | **2.4× revenue impact** |
| **AI transformation + rollout** | $380K (4 vendors) | **$245K** | 4 mo vs. 11 mo | **3.1× adoption rate** |
| **Embedded growth (6 mo)** | $420K (3 vendors) | **$285K** | Continuous | **2.1× CAC efficiency** |
| **Brand refresh + product UX** | $185K (2 vendors) | **$130K** | 3 mo vs. 8 mo | **1.9× retention** |

### Q2 2026 breakout categories — where the demand moved

CATEGORY 01

#### AI workflow design

Companies want their ops translated to AI-augmented systems. **+280% YoY demand.** Discipline 07 of 9.

CATEGORY 02

#### Fractional CXO

$8-25K/mo retainers replacing $200K-$400K W2 hires. **+185% YoY listings.** Discipline 08.

CATEGORY 03

#### Operating-partner retainer

5-7 person pods, $42-95K/mo mid-tier. Replaces 4-5 specialty vendors. **+56% YoY engagement count.**

### What we're watching for Q3

- **Strategy-consulting share migration.** If implementation rates continue at 24%, more F500 spend will route to integrated operating partners. Q3 is likely the first quarter where operating-partner firms collectively exceed Big 4 in $5-50M ARR client count.

- **AI discipline as % of hours.** Crossed 25% in Q2. Watch for 35-40% in Q3 as more engagements bake AI into every discipline rather than as a standalone.
- **Vendor-count consolidation.** Average vendor count fell from 7.2 to 6.8 in Q2 for the first time since 2018. Inflection point.

### Sources + methodology

Rate data: The Agency direct engagement records + 1,200 sampled engagement intake conversations Q1-Q2 2026 + Levels.fyi agency snapshot. CFO survey: n=240 across $5-50M ARR companies, conducted May 2026. Numbers are estimates; treat as directional. Methodology in Vol II.