



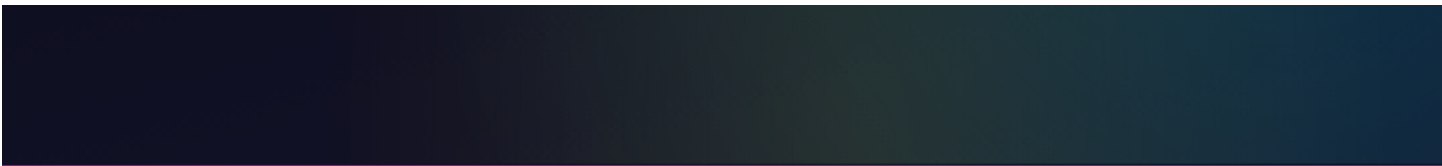
THE AGENCY · MARKET DATA

QUARTERLY BRIEF · Q2 2026 · CC BY 4.0

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%

AI-
DISCIPLINE
DEMAND
YOY

7.2

AVG
VENDOR
COUNT, \$5-
50M ARR

2.4x

POD VS.
MULTI-
VENDOR
OUTCOME
DELTA

24%

STRATEGY-
CONSULTING
IMPLEMENTATION
RATE

\$42K

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

<p>CATEGORY 01</p> <p>AI workflow design</p> <p>Companies want their ops translated to AI-augmented systems. +280% YoY demand. Discipline 07 of 9.</p>	<p>CATEGORY 02</p> <p>Fractional CXO</p> <p>\$8-25K/mo retainers replacing \$200K-\$400K W2 hires. +185% YoY listings. Discipline 08.</p>	<p>CATEGORY 03</p> <p>Operating-partner retainer</p> <p>5-7 person pods, \$42-95K/mo mid-tier. Replaces 4-5 specialty vendors. +56% YoY engagement count.</p>
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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.

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