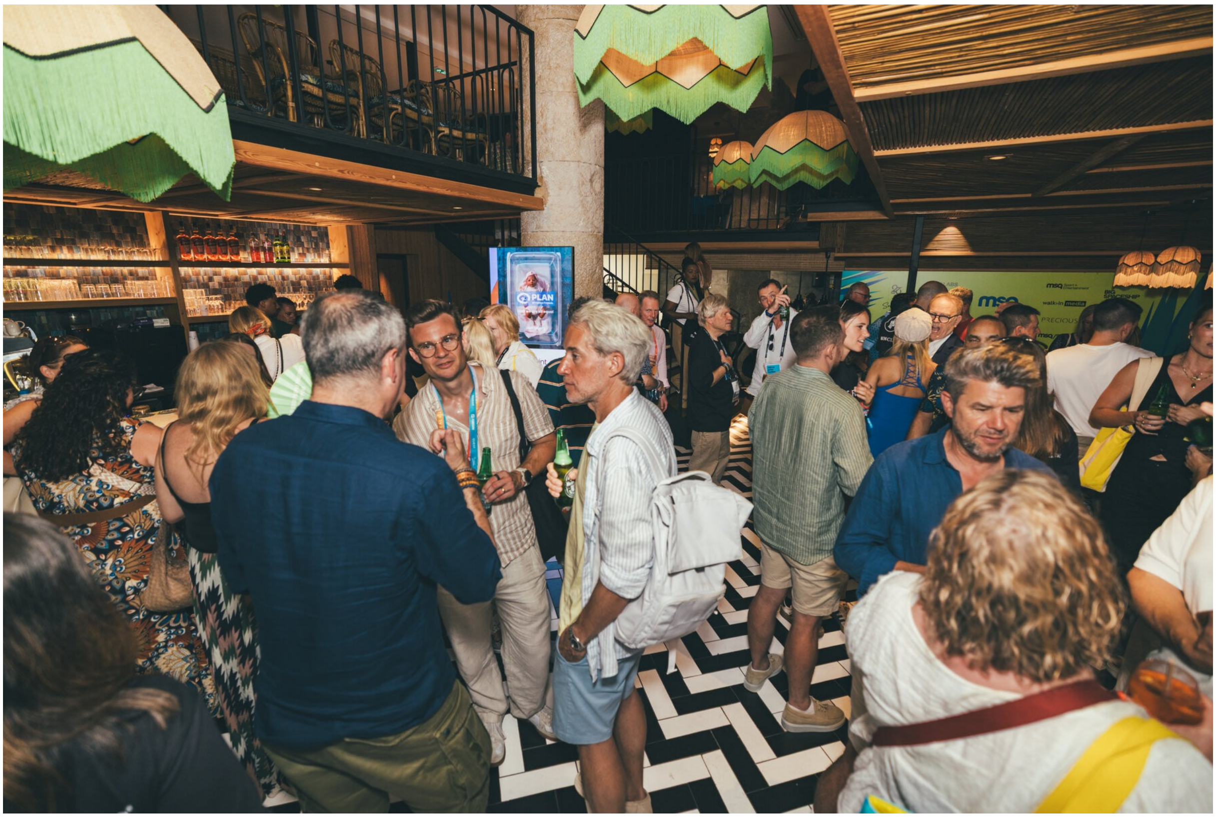
THE CANNES REVIEW 2026

Written by Julian Boulding, Founder and President of thenetworkone.
JULY 2026



The Indie Forum 2026 at Cannes Lions.

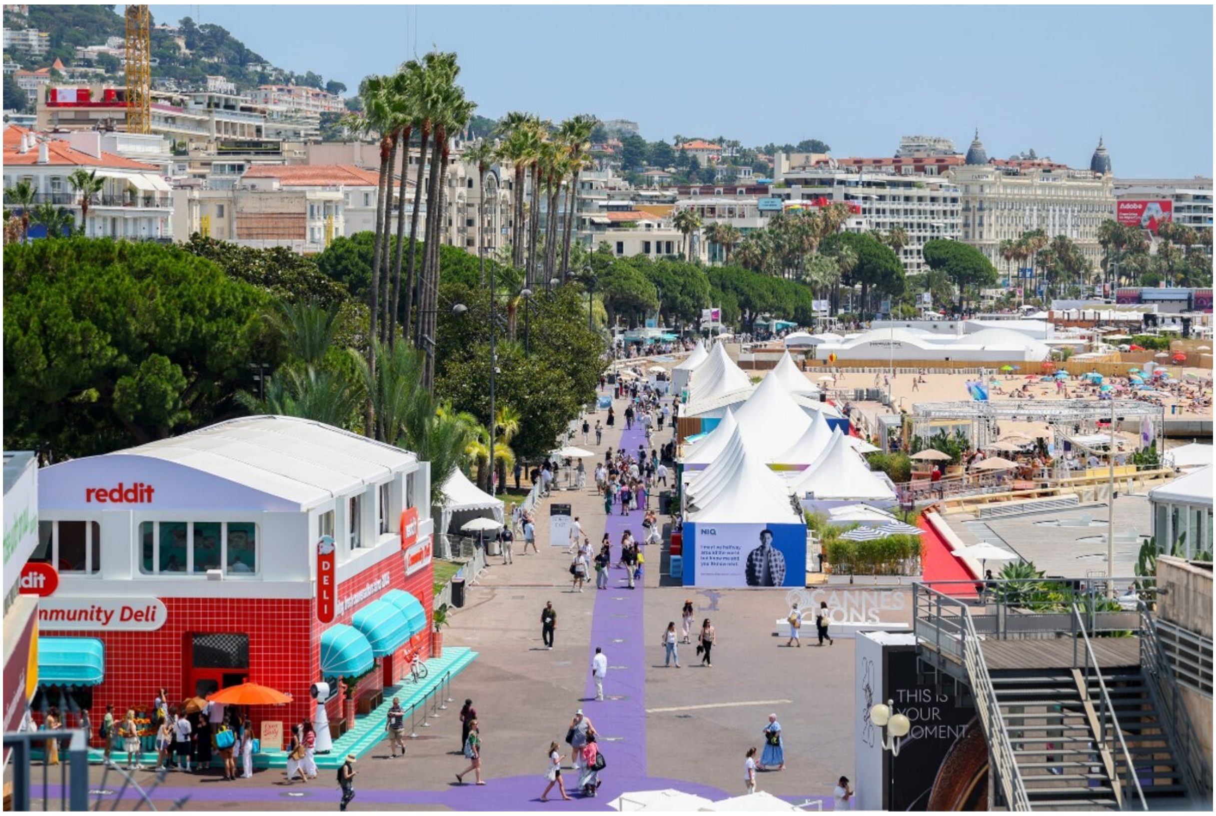
Every year, on behalf of thenetworkone, I publish a ‘Cannes Review’. It appears a couple of weeks after the end of the Cannes Lions Festival, once the dust has settled and underlying trends start to appear more clearly.

I must start with a confession. I have been to Cannes for the last 20 years and I should know better by now, but I completely messed up my week in the South of France.

How and why?

There was so much great content and so many great people.

I rushed up and down the Croisette, trying to see all of it and all of them.



The Croisette, Cannes Lions 2026.

The only parts of the week I actually remember enjoying, were when I was forced to stay in the same place for a couple of hours. Gemma and Dan's legendary island lunch. Chen Yong's Autovision and Weibo event, with the Chinese carmaker BYD. Dinner with thenetworkone team. Our own Indie Forum and drinks party at MSQ's blissfully cool Café MSQ. The final cocktail in the Adweek House, when there were literally no more seminars to go to, and I made friends with a lovely family of Bolivians.

And this in itself, was the biggest lesson from Cannes 2026.

For the last ten years, we have all been part of an involuntary Gadarene rush, to achieve SCALE. To do MORE. To get BIGGER. To merge, to acquire, to control.

In our industry, this has been led by the tech platforms – Meta, Google, Amazon, Apple, Netflix and the rest. Their hideous, prefab pavilions dominate the town. As Brian Collins put it, we stand in front of one of the most beautiful bays in the world – and we can no longer see it. They also block us from the natural sea breeze, making 31 degrees seem ten degrees hotter.

No wonder Cannes is hoping to move the festival three or four weeks earlier – but they could perhaps consider addressing the problem, not the consequence.

My vote for the Titanium Grand Prix – if they had entered, –would have gone to Adweek , for the map of Cannes showing which venues were, or were not, air conditioned.

Thank heaven for aircon. Just a pity it also contributes significantly to global warming.

Talking of which – my most eye-opening conversation of the week (in the Adweek House) was with an old friend who is always at Cannes, the Creative head-hunter known as Sascha the Mensch.

Sascha talked about China. Aside from the Autovision event mentioned above, the Chinese were conspicuously absent at Cannes 2026. Why? Politics? Economics? I don't know, but it's a crying shame to hold a global festival without one of the two great innovative powers of the world today, while the other one was so over-represented. (Almost half the 2026 Awards Jury Presidents reside in the USA.)

Sascha told me that while the US leaders in AI and digital technology generally are rushing to ever greater scale, the Chinese are heading in the opposite direction. Open AI, Anthropic and the rest are continually expanding their GPT's, until they can know every subject and answer every question (this is the meaning of GP – General Purpose).

Whereas the Chinese are moving to smaller, more specialist platforms where consumers can research the topics they are interested in. This has the side-benefit of consuming significantly less power and making significantly less contribution to global warming. It also helps corporate profits – energy use, measured in tokens, is decimating the corporate expenditure budgets of Western multinationals. Uber reportedly spent its entire 2026 AI budget by the end of April.

Cannes 2026: The festival and the awards

Inevitably, this was a challenging year for the Lions.

Awards entries, the Festival's key profit driver, were down 25% year on year. Unsurprisingly, as the market value – and spending power - of the Agency Holdcos plummets.

WPP's market cap is down 80% in value over five years. Dentsu's International Division has been for sale all year, with no buyer in sight.

Prior to last year's mega-merger announcement, the value of Omnicom was around US $ 19 billion and the value of IPG was around $11 billion – total $30 billion. Today, the value of the merged entity is around $21 billion – meaning almost the entire financial value of IPG has been wiped out, in less than a year.

The number of official pass-holding attendees has not been officially announced, but according to Advertising Age was approximately static year-on-year. What we don't know, is how many people who formerly bought the full pass for around 5000 Euros including tax, this year bought discounted passes for Challengers, start-ups, Creators and the like.

It would be easy (and partially true) to say that this is not Cannes' fault: we can all see headcounts contracting and revenue declining as the industry adjusts to the new reality, where the business models like time-based fees are losing credibility, as AI can perform many people-tasks, which used to take weeks, in minutes or seconds.

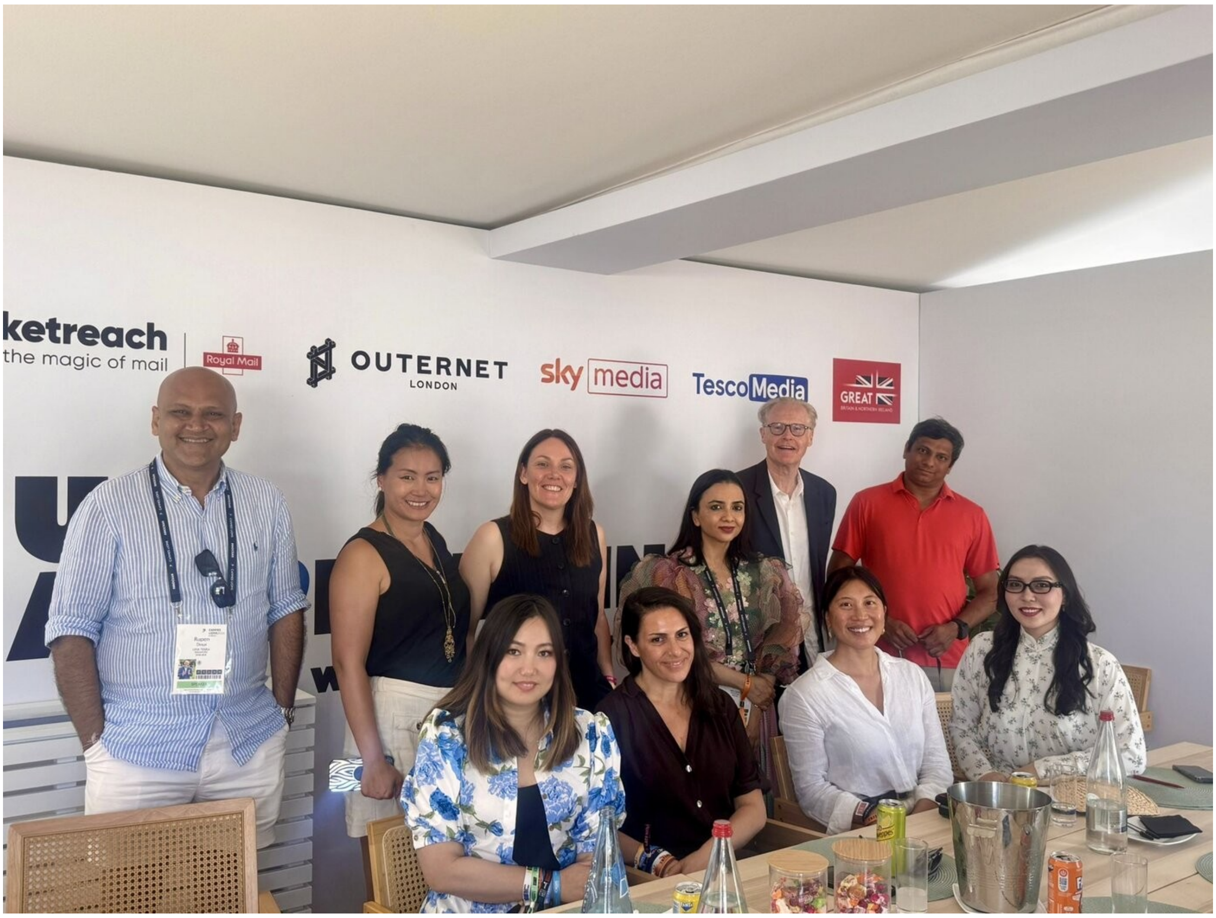
Sure, the tech giants were there in force, but mostly fielding sales people rather than thought leaders.

Client-side CMO's were prominent and engaged – although the number of "exclusive", invitation-only, events for CMO's did provoke criticism in some quarters. If you want to be in a filter-bubble, go to Possible instead (it's also air conditioned). When the Cannes narrative talks about the joy and value of unexpected encounters, excluding people from the discussions is the wrong answer to the problem.

Happily, agency people are canny and resourceful. The password to get through the security at the Carlton was quickly known to be "I'm with them," as the person ahead of you with an official invite, disappeared through the revolving doors!

The answer must surely be: keep the faith, and do what it takes, to be once again the world's only large-scale marcoms and creativity event that is genuinely global. Cannes Lions global leadership is incredibly valuable for our industry and if they need our help to keep it that way, we should all be offering our services.

Bring back the Chinese, bring back the Asians, and bring in the Africans. Together, they make up two thirds of the world's population and almost half of global GDP. And I suspect, you won't find many of them at Possible.



UKAEG Asia seminar.

So: who won the big awards? Why, and what for?

Every year, we look at who won the biggest prizes, the Grand Prix's.

This year, Indie agencies are fashionable. Historically, the percentage of awards won by Indies (take a bow, Wieden + Kennedy and Jung von Matt) hovered around 10% to 12 %.

This year, 25% of Grand Prix's were won by Indies, which is a significant change. And one which is likely to herald a trend, as AI helps smaller agencies "game the system," with better predictions about which entries will win the prizes.

A couple of clues: first, the art and science of predicting winners is not about the work itself. The Lions is a competition for the best case histories. And second, as so convincingly argued by Ben Condit's brilliant new award-predicting software, *Shortlist*, it's also about discovering who is going to chair the Jury and guide the awarding judges in the criteria they should apply in selecting the work.

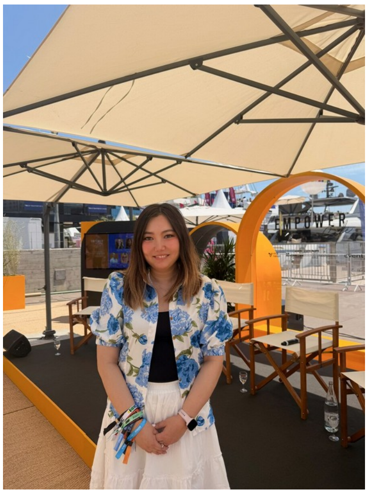
That said: the most interesting aspect of our Grand Prix winners analysis this year, was actually not WHO won – but WHAT won?

And in the spirit of what's been said above, I am going to "pass the mike" momentarily to our newest colleague, Bolor Narantsatsralt. Subject to visa approval, Bolor will join thenetworkone in London in September.

She will be the first Asian member of our team, and the first non-native English speaker.

For the last seven years, she has been CMO of Pizza Hut in Mongolia, so she will also bring us a valuable "client-side" perspective .

Over to you, Bolor, to represent the future:



BOLOR NARANTSATSRALT

Incoming, thenetworkone London — formerly CMO, Pizza Hut Mongolia

"I spent some time reviewing this year's Cannes Lions Grand Prix winners and I wanted to share a few thoughts.

After reviewing this year's Grand Prix winners, one thing became very clear to me.

This year's Cannes Lions was not really about advertising. It was about solving business and customer problems through creativity.

Compared to previous years, I felt the work was much more practical. There were fewer campaigns created just to get attention and more ideas that actually changed products, services or customer experiences. As a marketer, I really enjoyed seeing creativity connected with real business outcomes.

Creativity is becoming a business tool:

One thing I noticed across many Grand Prix winners is that creativity is no longer only the responsibility of the marketing department. Many of the winning ideas required collaboration between marketing, product, technology and operations.

That is where I believe the role of a CMO is changing. Marketing should not only communicate the business strategy, but also help shape it. Brands are creating value before asking customers to buy.

Several winning campaigns focused on helping people first, instead of selling first. That really stood out to me.

Consumers today are surrounded by advertising every day. What they remember are brands that make their lives easier, solve a real problem or offer something genuinely useful. I think this is where our industry is heading.

AI is no longer the story.

Last year everyone talked about AI. This year I hardly noticed AI, and I think that's actually a good thing. Technology should support creativity, not become the campaign itself.

The strongest ideas still started with a simple human insight. AI was just one of the tools behind the execution.

Business impact matters more than ever.

As someone who has worked in QSR for many years, this was probably my favourite part.

Many of these campaigns were not only creative, but also delivered measurable business results. For me, great marketing should always achieve both.

Winning awards is great, but growing the business is even better. The best work can do both.

What I think Asia can learn:

Asia produces some of the most creative campaigns in the world, but I still think we rely too much on promotions, influencers and social content.

Those activities can increase short term sales, but they don't always build long term brand value.

The 2026 Grand Prix winners reminded me that sustainable growth comes from improving customer experience, building trust and creating products or services that people genuinely value.

My biggest takeaways:

If I had to summarise Cannes Lions 2026 in one sentence, it would be this: Creativity is no longer about making better advertising. It is about building better businesses.

For me, that is exactly where modern marketing should be.

The best campaigns this year were not just beautiful ideas. Whether it was Haven, Three Words, The Periodic Fable or The Final Copy of Ilon Specht, each campaign demonstrated that creativity can solve real problems, create measurable value and strengthen a brand in ways that customers can actually experience.

That is the kind of marketing I want to see more of."

Bolor N

bolor@thenetworkone.com

Bolor's comments about the rising importance of business outcomes versus creativity will strike a chord with many CMO's – and CMO's pay the bills, so agencies need to take note.

It wasn't just our newest arrival who came home from Cannes with something to say. Alfie Buisson, of thenetworkone, has now done three Cannes Lions, and this year he found a different kind of insight — less about the awards, more about how you actually spend the week. Over to Alfie:

Cannes, Three Years On

ALFIE BUISSON

Associate Director, thenetworkone
alfie.buisson@thenetworkone.com

Following on from Bolor's piece, I wanted to add a perspective of my own.

This year I saw a side of Cannes I hadn't seen before, and it made me realise something: three years on from my first Cannes Lions, the festival is what you make of it.

There's an enormous amount happening across the week. Tech and AI, music, CMOs, CEOs, agencies, creatives, sport, TV and much more... Cannes rewards the people who immerse themselves in what they actually care about. If you're there purely for new business and growth, which many are, you'll still win more and build stronger relationships by being in the room with the people you've always wanted to be around, not just the people you think you should be around.

For me, that's music, nightlife and culture. I met so many people this year who shared that view, and even when they didn't, they had a story to tell and a story to learn from. I went to the Tracks and Fields party and met a music composer who specialises in storytelling for brands.

He'd come to Cannes to learn how to stand out in a world of AI. It struck me that this is really about taste, and understanding that not everyone shares yours. Taste is great for you, but being tasteful, thinking about others and combining passions, is what actually matters.

For some, Cannes can feel like a slog of a week. It doesn't have to be. The festival rewards curiosity. Talk to the people who interest you. Everyone there is trying to build connections, develop their skills and expand their knowledge, and surface-level conversations are what happen when you don't put yourself in interesting positions or ask interesting questions. Everyone has a passion. Everyone has something worth sharing.

Be in the room. Not everything will be relevant to you, but everything has relevance.

Alfie's right that Cannes rewards curiosity over checklist-ticking. As it turns out, that's exactly what the CMO's at Cannes this year wanted from their agencies too.

Cannes 2026: CMO perspectives

CMO's can be pretty direct about agencies who slip behind the play. Natalie Wills of Expedia said, "Presenting an ad as a TV idea all the time, is counter-intuitive to how we buy media. I wish agencies would start presenting, for example, an audio ad – or what it looks like in Tiktok."

Marc Pritchard of P&G, historically a strong advocate of long term AOR relationships, said "For agency partners, it's not a one-stop shop any more. We need to leverage each others' super-powers."

And yet – the 'Clients' don't have all the answers either.

CMO representation in the C-Suite is down this year, from 71% to 66% according to Spencer Stuart's recent study. The need is not so much to speak the *language* of the Boardroom (read: CEO + CFO) but to speak the *numbers* of the Boardroom.

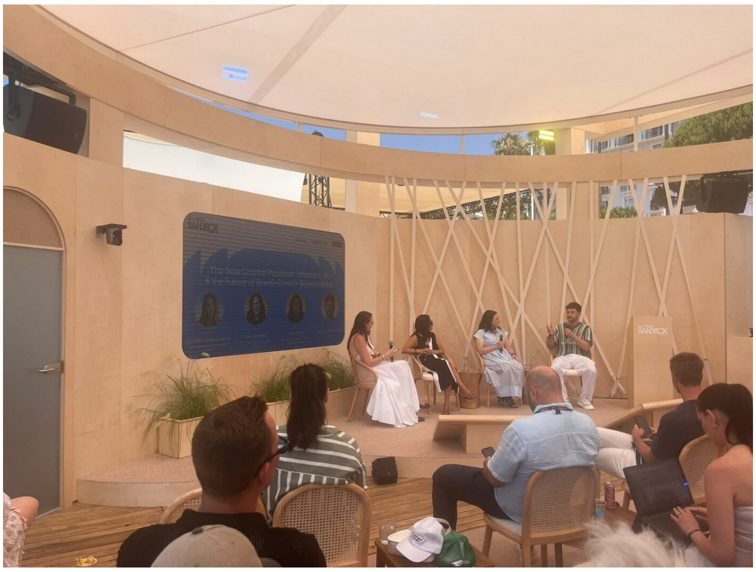
A new report, presented (invitation-only) at Cannes this year by McKinsey, found that "70% of CEO's measure marketing impact based on revenue and margin growth" – CFO numbers are similar - but "only 35% of CMO's track these as top metrics."

The same report finds that "only 30% of CMO's feel their company has a clearly defined view of Marketing ROI" – down from 40% in 2025.

Kalli Chapman of Prudential had the smartest answer I heard.

She said, "People struggle to understand the true revenue and dollar impact when we say 'brand awareness' or 'brand conversations.' So after looking at revenue and margin growth, she adds other metrics like talent recruitment and retention, or public policy impact, to "make conversations about brand equity more tangible".

Everyone talks about AI, but what is AI delivering?



AI × Tech Sandbox: "The New Creator Playbook," Cannes 2026.

The recent Procurecon Marketing Europe conference, featuring the heads of Marketing Procurement for many top advertisers in Europe found that while Marketing Procurement can recognise how AI can drive marketing efficiency, they have little idea how to judge whether in can deliver marketing effectiveness. Many companies have not yet agreed whether it sits with Marketing procurement, or IT procurement.

Last year's focus on in-house agencies also seemed to have faded a little. Undoubtedly there are companies who function best with these, especially if they work in fast-turnaround sectors like e-commerce, or highly regulated sectors where you want the legal teams across the corridor, not just on speed dial.

Others (like Uber) prefer in-house teams in established operations, but flex by contracting more external agencies in times of rapid geographic expansion (surely an opportunity for agency-side Growth Directors). Not so many talked about creative excellence, though.

Game on …

So what about agencies? Who is in demand?

George Kypraios of Yefira, who was not at Cannes but spoke at our recent Indie Summit, had an interesting pointer. George is an M&A guy and other than Data and AI, the agencies he finds to be most in demand are experiential.

Why experiential?

Jeff Jenkins of Sam's Club, who defined his business priority as customer acquisition, said, "People want to touch and feel, more than ever. We're seeing that with Gen Z, it's about the in-club experience, the real world experience.."

There is a growing realisation that life lived behind a screen – doom-scrolling on social media or hours spent in Teams meetings - is not a fulfilling experience for human beings.

And yet – life behind a screen is what the dominant companies of our era are mostly supplying. Google, Meta, TikTok, Apple, Amazon, Netflix… the list goes on.

Mark Zuckerberg's infamous broadcast to the thousands of Meta staff he was about to kick out on to the street, explaining what a difficult decision this was for him and thanking them for their contribution to making him a trillionaire, will live on as a locus classicus of disconnected corporate culture.

Richard Edelman demonstrated this in the context of Edelman's famous annual trust barometer. Trust is being eroded and human connectivity literally destroyed by these companies. Here are a few dystopian soundbites from Richard:

— "Trust is built from the bottom up – from Friends and Family upwards"

— "People have no sense of what the truth is. So they are withdrawing."

— "People are in a very insular mindset, their groups have become very small"

And how to address this?

— "Brands have to *do* something. They can't just *say* something".

— "Use Creators – people who have their feet on the street – not celebrity influencers"

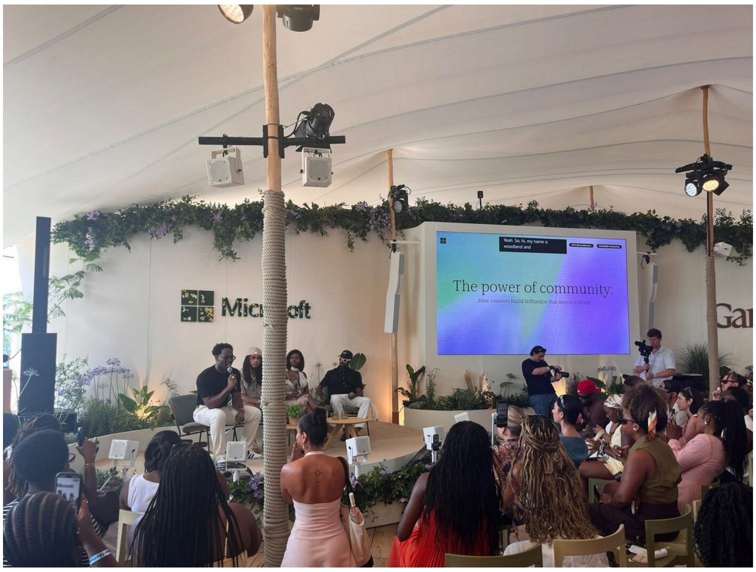
— "Talk to people in the way they want to speak"

— "What is going to stand out is brands that really inform me and value me as a voice. They do it in part, by letting go of their power."

To us, the last sentence is the most interesting. You could say, it's always been the premise of Edelman's world of PR rather than advertising – but it's more than that.

As media owners move from selling time and space to selling audiences, and marketers today move away from crude demographic targeting towards cultural affinity groups, fandoms and communities – we are seeing the birth of a social movement of extraordinary potential.

The first buzzword of Cannes 2026 was: COMMUNITIES.



“The Power of Community” — Microsoft's Cannes activation.

Be cautious: there are two words which look the same, but they are not.

Fandoms are groups of people who brands like to TALK AT.

Communities are groups of people who brands need to TALK WITH.

Kimberley Starin of Zoom caught this perfectly, defining her objective as Customer Proximity: “Our fundamental role as marketers is to be the voice of the market, NOT the voice to the market.”

Marketing does NOT equal one-way communication. As Carly Gomez of Crocs reminded us, “Gen Z does not want to be sold to.”

Mark Pasetsky’s Mark Allen & Co led a session on Confident brands and this was another recurrent theme.

Confident brands don’t *promise* things, they *do* things.

They are more likely to be missed if they were no longer there (especially B2B brands, who tend to think longer term than B2C brands).

They don’t hire influencers who are not committed users of the brand.

They are intentional, purposeful, thoughtful, goal-directed, inclusive-not-exclusive and above all, *they trust their customers, rather than asking their customers to trust them.*

One CMO panel asked its participants to describe the future of Marketing in a single word.

Tamika Young of Hinge said, “Heart”.

Marta Morena Gomex of Heineken said, “Human”.

Zena Srivatsa Arnold said, “Community”.

This is a pattern… and it's the antithesis of screen culture.

Nick Tran of Diageo, talking about OOH advertising, said "People are starting to realise that that the stuff on their screens is overwhelming, and not engaging."

Confident brands are inclusive, not exclusive. They build communities who include employees, creators, customers and consumers.

They are not the playthings of investors, sold on special offer by distributors and contract salespeople. Their social posts are written by real people (check out Sarah Clay's brilliantly simple book, "Employee Advocacy on Linked In") – not corporate pages, written and re-written daily by Claude.

However: the role of Marketing is not to build communities. That is top-down, dirigiste thinking.

The role of Marketing is to SHAPE communities, using artisanal, human-centric skills like storytelling.

As David Reynolds of Hilton put it, marketers need – "Simplicity. Know how to tell your story in its simplest form. It will improve your media strategy, your creative strategy - and your measurement strategy."

To conclude on Communities, Alice from thenetworkone gives her side:

ALICE CARR

Community and Engagement Manager, thenetworkone

The rise of 'community focus' at Cannes doesn't seem like an industry trend to me - it feels more like a reaction to a growing global problem: loneliness.

Cannes is brilliant at bringing people together once a year. Everyone's LinkedIn posts were about the amazing people they'd met and the friends they'd made along La Croisette. So how do you keep that spirit going all year round? The need for live, in-person, personal contact has clearly never been stronger and this is where community thrives. What can we do to let the genie out of the bottle every month of the year, not just one week in Cannes?

For the first time in our history, thenetworkone will be launching a community membership programme to make that wish a reality. If you'd be interested in joining, please get in touch - we would love your thoughts on how to make this work."

* Alice Carr, thenetworkone, alice.carr@thenetworkone.com

The second buzzword at Cannes 2026 was: ECOSYSTEMS

If Communities are our future redemption: Ecosystems are our means to that end.

The hierarchical, top-down, command-and-control structure of our industry's historic legalised-Ponzi-scheme has collapsed.

The new generation of marketing and communications – like the invisible micro-rhizomes which transfer moisture and nutrients in a forest, from the trees which have too much to the trees which need more – will be an ecosystem of collaborators and equals.

Indie agencies are the talk of the town, because they already know this. Lacking the capital to buy suppliers and collaborators, they need to ask for help from experts and specialists. Their interactions are founded on mutual needs and mutual benefits and consequently, mutual respect.

Those who thrive, will be those who use storytelling to create a narrative which shapes how a community forms; then facilitate its health and growth; and finally, monitor its success through both short term ROI *and* longer term brand equity, focussed on the creation of successful relationships within that community.

Maddie Pluck, of thenetworkone, found her own proof of this at Cannes:

MADDIE PLUCK
Senior Account Manager, thenetworkone
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Reviewing Cannes in a single line feels a little impossible this year. The sheer amount of "stuff" left me content-exhausted by the end of each day, if I'm completely honest. But that had an upside: the things I did learn really stuck, and the people I met made a real impact.

We all know Cannes is overwhelming, and this year I found solace (and a bit of fresh air) at the AI Sandbox, which unintentionally became my oasis. It's where I heard Reddit's Steve Huffman talk about the "dark funnel" — all the places people talk about your brand that you can't see or reach, which shape trust and loyalty far more than any official channel ever will. And just the next beach over at LBB, the What Brands Can Learn from Latin Culture panel hit the same nerve from a different angle — one of my most memorable sessions of the week. One of their points: Latin History Month isn't representation, and a once-a-year gesture isn't listening.

Different stages, same lesson: the conversations that matter most are the ones brands aren't in.

Which is why the gap I noticed all week felt so loud. For all the talk about creators, almost nobody mentioned the people already inside our businesses — the ones whose group chats and day-to-day conversations shape a brand's reputation from within. After the work we did at the Indie Summit, indies are already ahead of that curve. My bets are on that being the next big conversation at next year's festival.

Which is exactly the kind of thing our own Indie Forum at Cannes this year was built around:

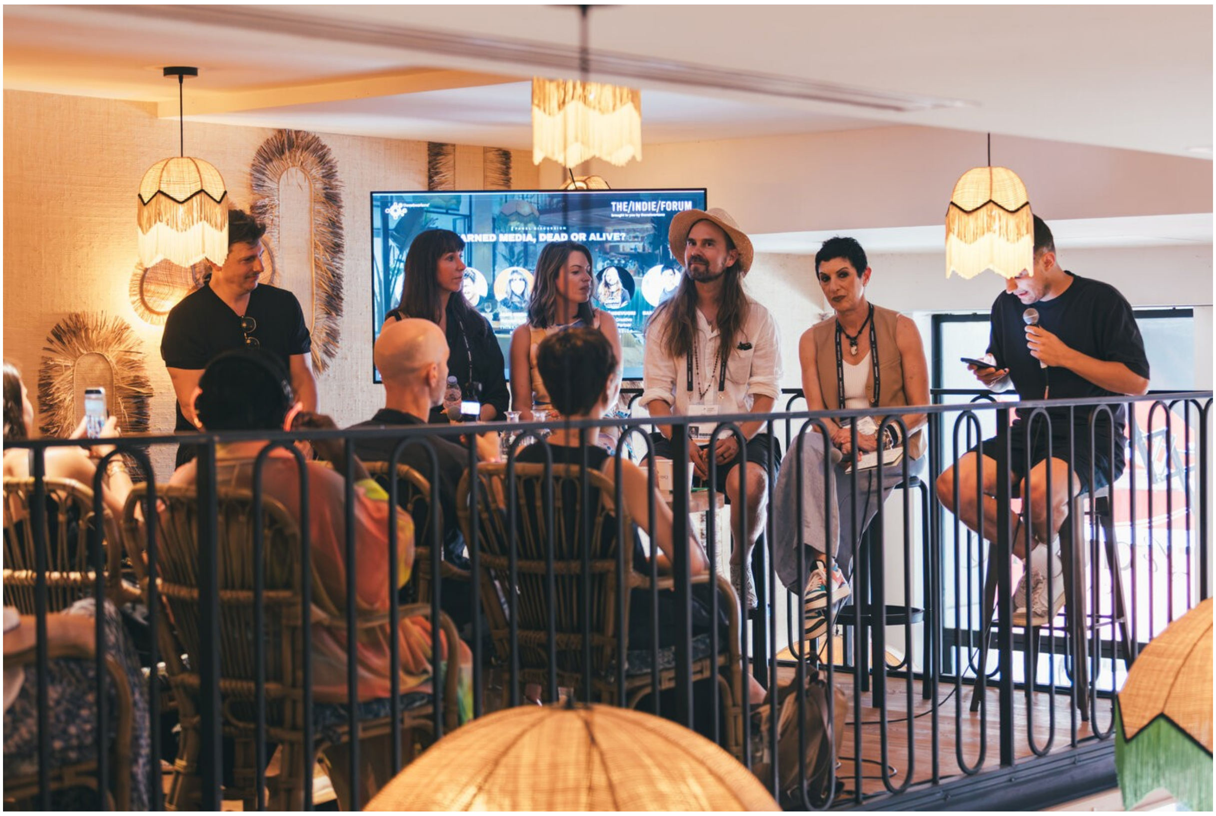
THE INDIE FORUM 2026

Once again, thenetworkone brought together leaders from across the independent agency world for two lively panel discussions at Cannes - followed, of course, by drinks, and the chance to connect with fellow agency leaders from the thenetworkone community and beyond.

Held at Le Club MSQ, the mood was exactly what you'd expect from a room full of independents: bold opinions, honest conversation, no corporate spin. That's the energy only the indie community can create.

PANEL 1: IS EARNED MEDIA STILL RELEVANT?

Speakers: Tom Wenborn (Thinkerbell), Jane McDaid (THINKHOUSE), Kerri Young (Smarts, MSQ), Jari Lähdevuori (SAMY Nordics), Barby K. Siegel (Zeno Group), Kai Sedel (Serviceplan)



The Indie Forum: "Is Earned Media Still Relevant?" — Café MSQ, Cannes 2026.

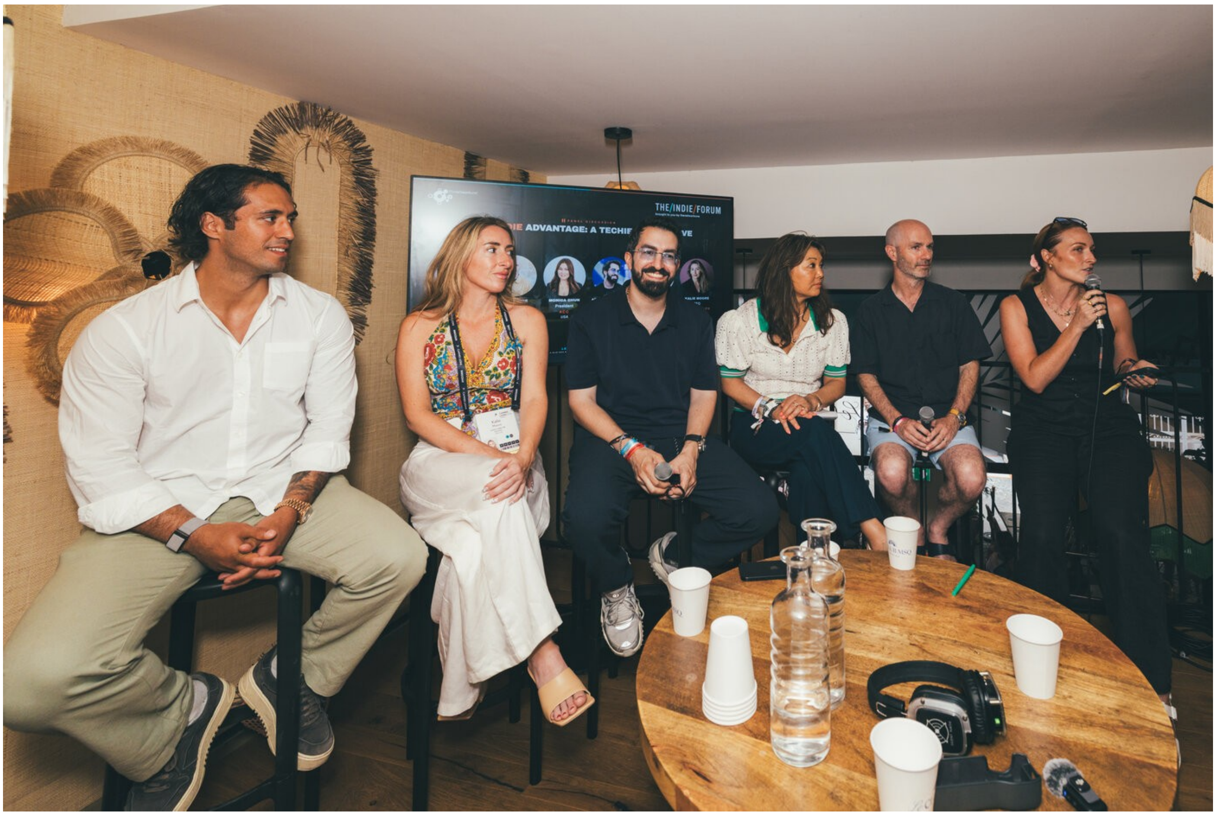
Our first panel tackled a question the industry keeps asking itself: is earned media still relevant? The room's answer was unequivocal — not only is earned media alive, it's expanding.

Earned no longer means press coverage and journalist relationships alone. It now stretches across social sharing, community engagement, creator amplification — even how content shapes search and LLM ecosystems.

The future, the panel agreed, belongs to integrated communications: earned, paid, owned and social working together to build genuine cultural impact.

PANEL 2: WHY AI ADOPTION SUCCEEDS OR FAILS

Our speakers included: Amir Salim (ex-Lovable), Kalie Moore (High Vibe PR / PRCoverage.AI), Alexander Morad (Bright Mind Agency / oriiion AI), Monica Chun (ACC), Jules Love (Spark AI), Jocelyn Wright Medhurst (Propeller).



The Indie Forum: "Why AI Adoption Succeeds or Fails" — Café MSQ, Cannes 2026.

Our second panel dug into why AI adoption succeeds in some agencies and stalls in others and whether the real barriers are skills-based, operational, or simply leadership not moving fast enough.

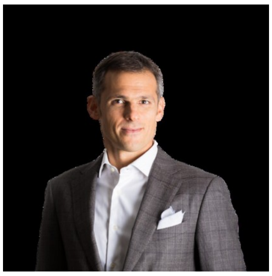
The consensus: buying AI tools is the easy part. Embedding them into daily workflows is where agencies actually get stuck… they are tripped up by cultural resistance, leadership gaps and unclear expectations.

And the one thing AI still can't do? As Amir Salim put it: "AI cannot break the rules." Creativity still comes down to human instinct, intuition, and the nerve to push past them.

Which brings me back to where I meant to end all along.

I was tempted to end with the Asian wisdom of Siew Ting Foo, encouraging us to embrace the concept of "Chunhai" – going forward with soul.

But I am a child of the West, so I'm going to finish with my favourite quote of the week, from Cannes outlier ICCO's article authored by their President, Massimo Moriconi:



MASSIMO MORICONI
President, ICCO

"

In every transformational era, leaders search for the next source of competitive advantage. Over the past decades, the answer has typically been scale, technology or intellectual property. Today however, a different asset is emerging as the defining factor of organizational success: Relationship Capital.

Now, let's go back to the beginning of this article and ask ourselves:

Are powerful, meaningful relationships built "at speed", and in a rush?

Are they built from behind a screen, as TikTok, Meta, Amazon, Google, Netflix and the rest, would like us to believe?

No. They are built through mutual trust, respect, benefits and voluntary collaboration.

This has been the ethos of our company, thenetworkone, since our foundation more than 20 years ago.

If you'd like to know more: please get in touch.

Julian Boulding
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