Promethean Research

North American Agency Market Sizing Report

The size and shape of the North American digital agency channel, and the technology spend that moves through it.

Foreword from the analyst

The digital agency industry entered 2026 larger, more global, and more influential than ever before.

North America now counts more than 71k agencies, and the market remains deeply fragmented and overwhelmingly small. For any company that sells to agencies, that fragmentation is the hard part: the firms are difficult to count and harder to reach.

It is also what makes the channel worth the effort. Agencies do not simply buy tools. They specify, resell, and manage what their clients spend on hosting, software, and advertising. The reachable opportunity is not an agency's own software budget. It is the far larger spend an agency steers on a client's behalf, which is why the firms that sell to this market tend to end up selling through it as well.

We have tracked this market since 2015. What follows is our estimate of the number of North American agencies, how the market is structured, and the $850B+ in spend that this channel influences.

Nicholas Petroski

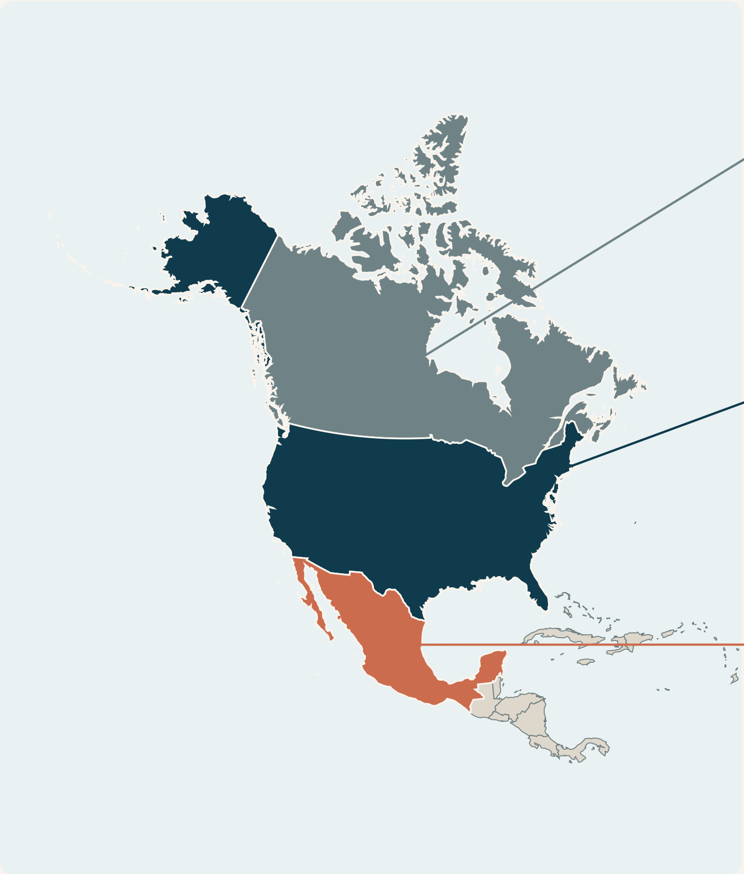
Founder, Promethean Research

THE MARKET AT A GLANCE

~71k	+42%	~$850B
agencies tracked across North America	more than in 2024	in client software, cloud, and media spend agencies influence or direct each year

Source: Promethean Research, 2026 Digital Agency Industry Report.

North America is home to roughly 71k digital agencies.



CANADA

8k agencies | 90% under 50 FTEs

UNITED STATES

62k agencies | 87% under 50 FTEs

MEXICO

2k agencies | 88% under 50 FTEs

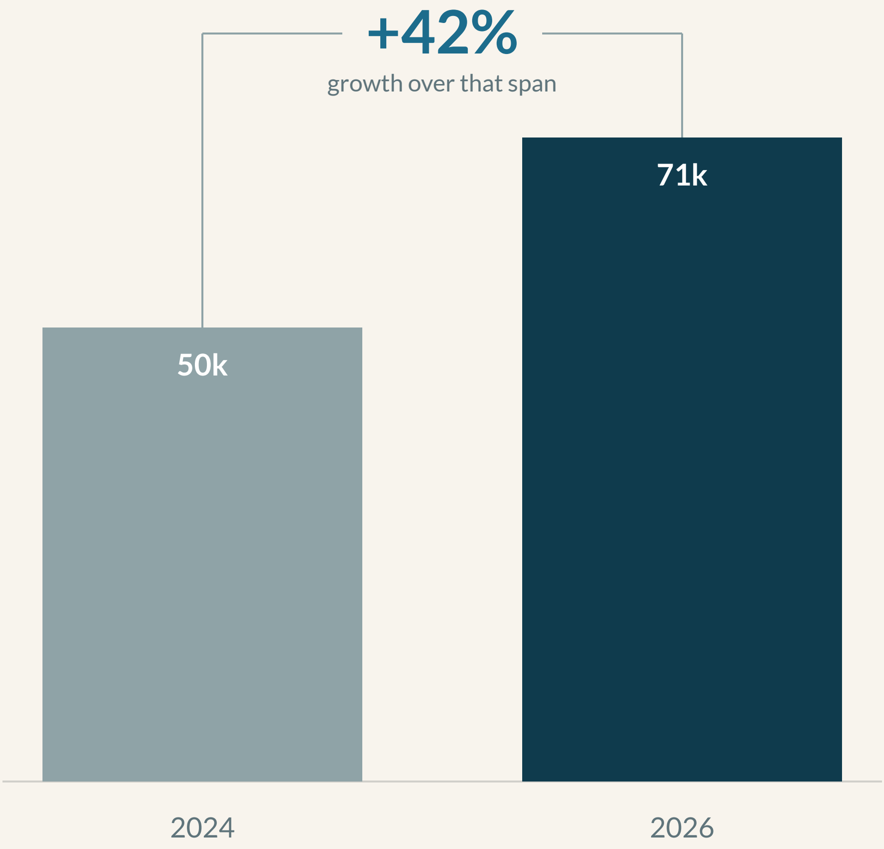
Source: Promethean Research

This is a bottom-up count of verified agencies, built one firm at a time from Promethean's agency tracking database. A tracked firm is a confirmed, active agency with a verified location. The figure is a direct count of those firms rather than an estimate derived from other sources.

What this count covers

North America here means the United States, Canada, and Mexico. The count includes agencies of two or more people and excludes solo freelancers.

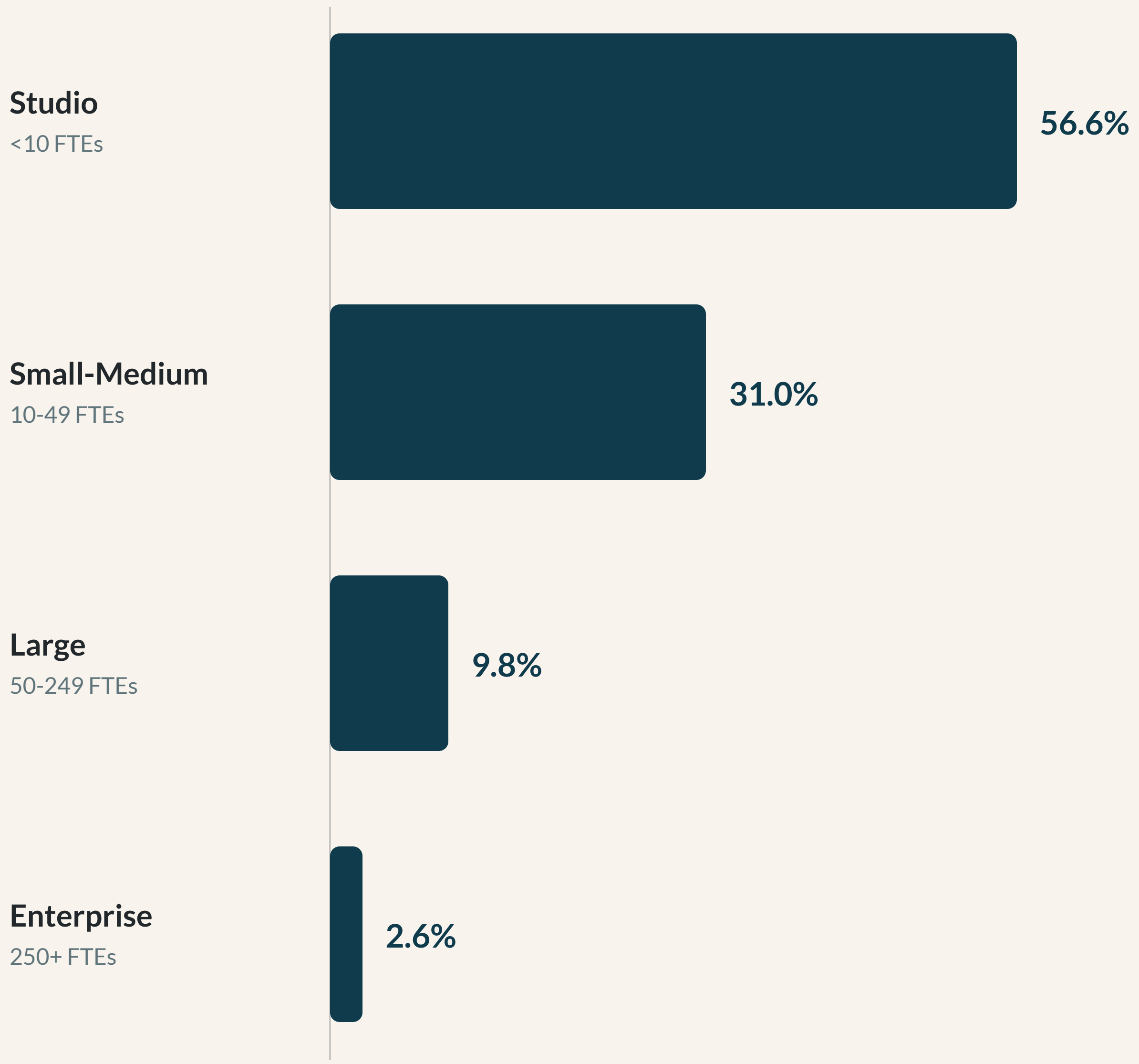
North America's agency count is not only large. It is growing quickly.



The industry has grown at a 12% compound annual rate since 2018. The 2024 and 2026 counts apply the same tracking rules, so the two years are directly comparable. The addition of Mexican agencies this year contributed under 2k firms to that figure.

Source: Promethean Research, 2026 Digital Agency Industry Report.

The market is overwhelmingly small, but the larger firms that resell and manage technology at scale are a countable segment of their own.

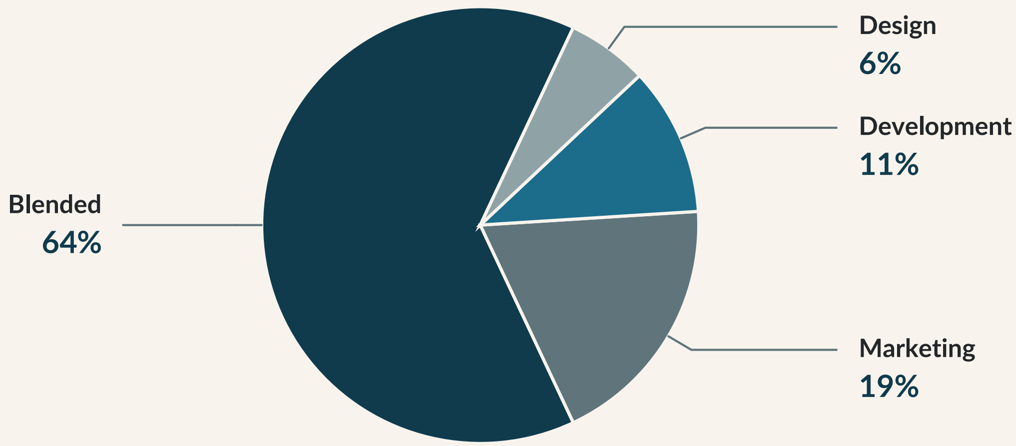


Source: Promethean Research, aggregated firmographic data, 2026. n=67,868 size-classified North American agencies.

The market is dominated by Blended agencies.

Blended agencies are firms offering a relatively even mix of design, development, and/or marketing services.

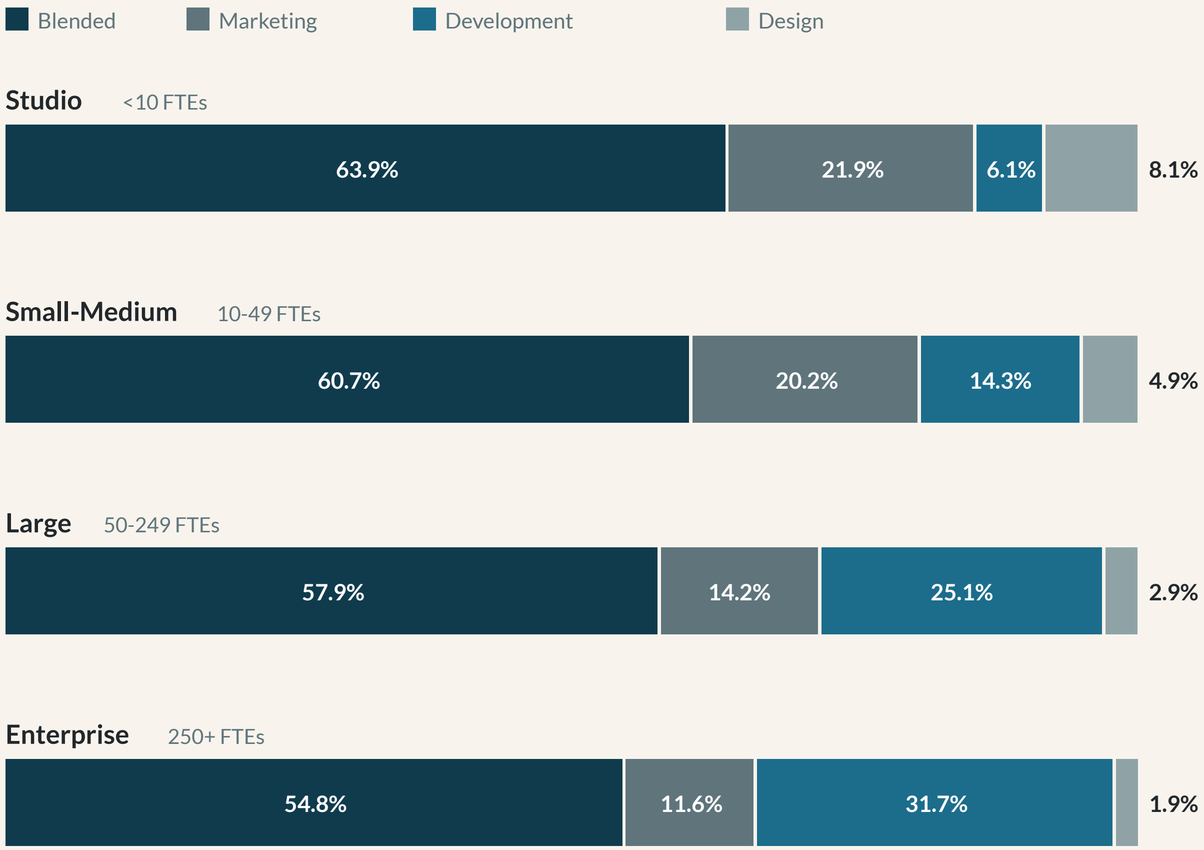
North American agency type mix



> Most agencies influence more than one technology category.

Source: Promethean Research, 2026 Digital Agency Industry Report · published North American mix.

The larger an agency, the more development-led it tends to become. Development-led share climbs from 6% to 32%, Studio to Enterprise.



Development-led agencies are the most hosting and infrastructure-intensive segment, and many specify and manage that spend on their clients' behalf. Because agencies become more development-led as they grow, the firms that have the most influence over this spend exist in the upper size bands.

Source: Promethean Research, aggregated firmographic data, 2026. n=67,868 size-classified North American agencies.

Digital agencies influence just over $850 billion in software, cloud, and media spend each year.

$850B

in annual client software, cloud, and media spend that agencies influence or direct

Global hosting	$149B
Global marketing technology	$552B
Global digital advertising	$488B

The parent global markets where agencies guide client decisions. The $850 billion is the estimated influenced portion across these flows, not their total. Agencies also guide other SaaS and PaaS decisions.

In our 2025 hosting survey, more than 80% of responding agencies said they are involved in choosing where their clients' websites are hosted.

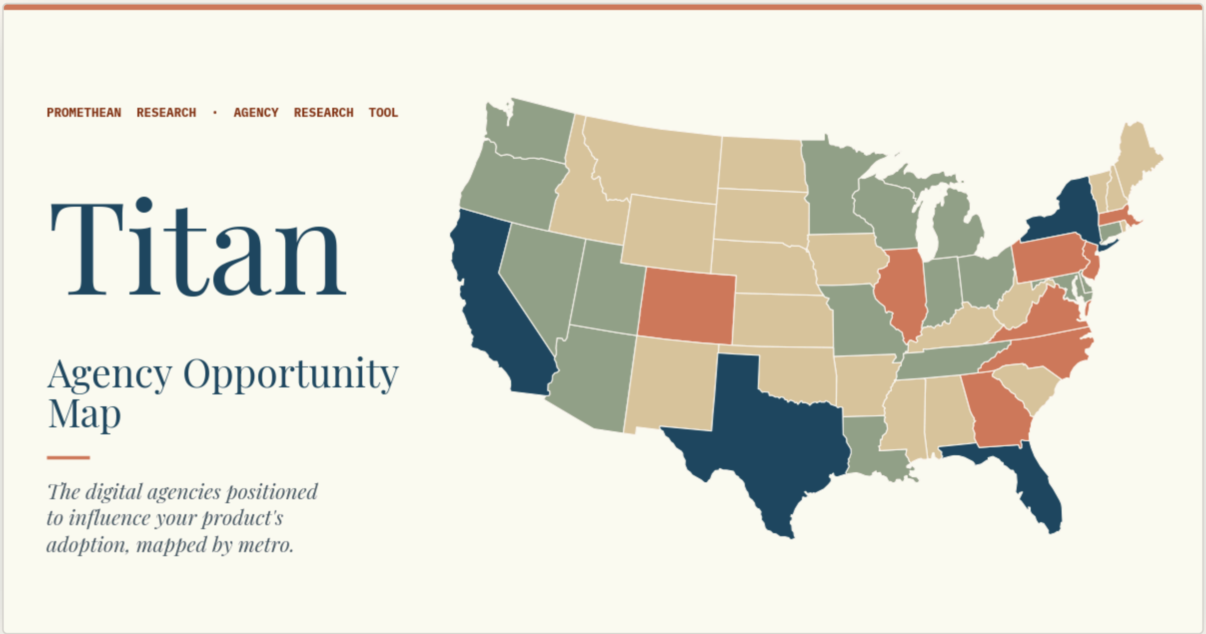
Agencies are often brought in to solve strategic, technical, and growth problems, which puts them directly in the path of major media and technology decisions. They help clients evaluate, choose, deploy, and manage platforms across hosting, ecommerce, CRM, marketing automation, analytics, digital advertising, and cloud infrastructure. Layering the advertising agencies place together with the technology decisions they steer, we estimate they influence or direct just over $850 billion in client software, cloud, and media spend each year. This is what makes the agency channel strategically important to technology companies, far beyond the agencies' own revenue base.

Agency influence on client spend is why so many technology firms run dedicated partner programs for digital agencies. But the industry's fragmentation makes it a channel that is easy to underestimate and hard to reach.

How much of any one category flows through agencies varies by segment. The Agency Opportunity Map, on the next page, breaks the figure down by geography and service line.

Size your own segment.

Many product companies have realized the importance of in-person connections with agency leaders. We have mapped 65k+ digital agencies by where they're headquartered, and the types of software, marketing, and ad spend they influence.



Open the Agency Opportunity Map →

What to watch in this market.

01

The market resists consolidation.

Roll-up attempts have failed due to a lack of economies of scale, short client tenure, and no barriers to entry. Fragmentation persists.

02

AI creates new demand and pressures labor at the same time.

1 in 3

agencies had adopted AI as of Q2 2026

AI is the first major technology wave that both creates new agency demand and pressures agency labor at the same time. A third of agencies had adopted AI across their businesses as of Q2 2026.

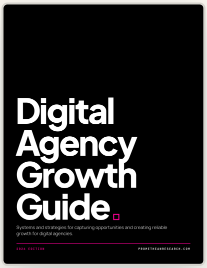
03

A significant opportunity.

No one currently owns the conversation in this space. Making inroads here requires more than a single webinar or blog post, but the brands that activate this channel can leverage it to build significant long-term value.

Activating this market

We help brands activate this channel with new research that agency leaders rely on to grow their businesses.



4×
Our research email CTR is 4x the B2B average.

200k+
We have over 200k digital agencies in our global database.

50k+
Over 50k digital agencies have used our research to build better businesses.

Each engagement comes complete with a full activation package.

Sales

A reason to reach out that isn't a pitch. Reps send the research to prospects as something genuinely useful, and open conversations about the prospect's business under your brand.

Marketing

Turnkey thought leadership. Grow your influence without adding a ton of new work to your team's plate.

Account Management

More value for current clients. Current clients get even more value from your brand, thus reducing churn and improving your LTV.

Leadership

A stronger position. A published study now carries your brand, written by a firm the industry relies on.

Explore licensing and sponsorship opportunities with Promethean Research →

Prior research partners

Where this data comes from.

These are built on our agency tracking database: 200k+ agencies tracked globally, approximately 71k in North America, tracked since 2015. Every tracked firm is confirmed as an agency with a verified location, service mix, and full-time employee size. We then categorized them into cohorts that are represented in the type and size breakdowns above.

Learn more about this market and how to activate it →

Promethean Research

Analyzing the digital agency industry since 2015.