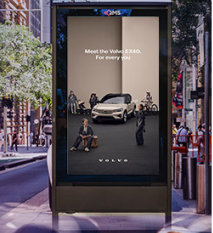


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OPINION

Ride the chaos: What to lookout for in 2025 from a media/agencyland perspective

If 2024 was any indicator, the new year promises significant changes and likely turmoil in the media and agency landscape. TrinityP3's Stephen Wright takes a deep dive into the key things to watch.

January 21, 2025 7:00
by STEPHEN WRIGHT



Welcome to 2025 – a year where the only certainty is uncertainty. The flurry of media and agency recent announcements highlights how Darwin's theory of evolution still holds: it won't be the strongest, nor will it be the smartest but rather it will be the ones most adaptive to change that will thrive and lead the market.

Here are some of the key interlinking themes likely to define the media and agency landscape in 2025:

The blurring of boundaries will continue to impact media selection and usage significantly

Media agencies are becoming resellers of inventory, clients are bringing more media in-house, and tech companies are bypassing agencies to deal directly with clients.

Marketers are concerned with media agencies transitioning from 'media neutral' advisory partners to resellers of inventory, wary of the increasing control and influence exerted over their agency partners by the large tech companies.

Clients who are providing all of the funding for the ecosystem are the ones most at risk from these changes. The question is have enough smart marketers noticed and are they prepared to raise the right questions around this?



Principal media-based trading will be forced out from behind its self-imposed shroud of secrecy

In 2024 several of the global holding groups openly acknowledged significant profit was now being derived from 'undisclosed trading' through their trading divisions, with other groups announcing an intent to more aggressively pursue this practice.

In a challenging ad market it's been highlighted as the way in which they send the message to investors that they are able maintain group profit. Now, you don't have to be Einstein to realise that increased media agency profitability can only come at the expense of the other two parties in the equation – principally clients and to a lesser extent media owners...

At some point, marketers and their procurement departments were always going to question a model in which their media agency partners self-determine the marks ups applied to inventory and determine their extraction rate and profitability.

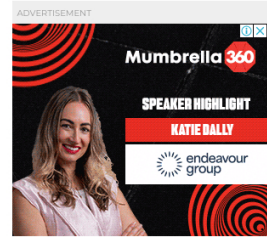
Accountability and transparency will increasingly be demanded by street-savvy clients and their procurement teams.

It's showtime for Market Mix Modelling (MMM)

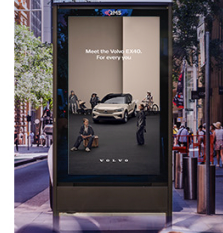
After two years of hype and big promises 2025 needs to be the year where clients see the proof of the promise from the MMM players.

Many of the players in the space have promised marketers nirvana for a number of years – a model and methodology which they can take to their C-Suite / board and demonstrate the ROI of the marketing spend by channel/medium.

The result has been two years of tremendous growth for the sector. Late last year Australia's largest locally owned media company Nine jumped on the bandwagon with its promise 'to hold itself publicly accountable' with third-party verification of advertising ROI. That announcement was warmly received but expectations are now running high.



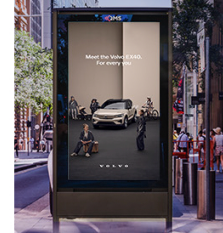
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2025 must be the year clients see proof of promises from the MMM players. With MMMs charging annual fees in the hundreds of thousands a tangible return will need to be seen.



Holding Co media agency offerings will be put to the test

Are mainstream media agencies really working in their client's best interests? This question has been around for more than a decade but it's increasingly coming to the fore.

Last year I can remember certain conference sessions on this which failed to reassure the market on this point. Those expecting a visionary presentation on the evolving needs of clients and how agencies would be stepping up to deliver, were sorely disappointed.

With the rise of arbitrage and reliance on media owner commitments (read: kickbacks) the question arises as to whose interest the agencies are operating.

The **Omnicom and IPG merger appears to offer little, if any, tangible benefit to clients** and for several years now mainstream media agencies have been losing business to a wave of dynamic new indie media agencies (often run by executives who used to work in the Holding Cos).

The **introduction of Accenture Song's new offering** which offers greater transparency from a team of highly regarded practitioners has put their rivals on notice (and potentially some noses out of joint?) 2025 will test whether the new kids on the block can challenge a 'status quo' which has long held.

Savvy marketers will seek to wrest back some control

Understanding of market dynamics and affirmative action to address the four themes above provides a real opportunity for clients.

Clients have been slowly losing control for many years. Regaining the upper hand and **seizing control of their media activities** is a winning formula. How to regain control is readily available and requires little more than taking action.

2025 stands to be a rollercoaster of a ride. Those who seize the opportunity to put themselves in the driving seat will benefit at the expense of those just along for the ride.

The road ahead will be complex, but those who adapt and innovate will lead the charge. It will be fascinating this year to see which clients can best position themselves to seize the opportunities and ride high on the wave of chaos and change.



Stephen Wright is Business Director & Global Media Lead at TrinityP3.

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