ADVERTISING

ARE INDIES TURNING UP THE HEAT ON HOLDCOS? – A PITCH CONSULTANT'S PERSPECTIVE (REVISITED)

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Stephen Wright, media business director, TrinityP3.

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In this piece TrinityP3's Stephen Wright revisits a piece he wrote two years for B&T on the rise of independent media agencies. In the analysis he asks if the indies are increasingly turning up the heat on the multinational rivals.

Two years ago, on the back of a surge in success for Indies and a session in Cairns, I penned **a piece designed to explain their success and why more and more marketers were looking at independent media agencies as a viable alternative.**

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In the fast moving media agency world, it is interesting to look back and reflect on the question of whether that wave of success has broken (as many predicted) or are Indies still riding high?

The foundation of success noted two years ago was a combination of factors coming together that created the perfect storm of opportunity. Revisiting these below:

The quality of staff with low churn

There has been no detrimental change here, just a slowly widening gap between the depth and quality of service the indies provide to all but the largest marketing teams.

Passionate, committed agency owners sitting round the table engaging with every client on a regular basis. More than ever 'people as much as product win pitches'

In contrast AI and automation in place of people are the 'cost saving' hallmark of the large Holdco's.

Meaningful credentials

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Meaningful credentials

The positioning lines of the Holdcos rarely inspire. By necessity, they are largely globally conceived (invariably in the US), cliched, jargonised, often an overclaim and rarely about anything of meaning.

Global positionings often change simply through the arrival of a new CEO morphing into a wildly different territory and claim with no discernible difference on the offering available.

The indies ooze authenticity, they live and breathe their offering.

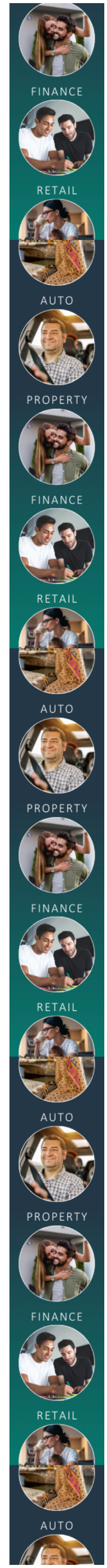
The increased importance of Strategy vs. Trading

AI and automation have raised the floor rather than the ceiling.

Advertisers are increasingly getting access to higher quality algorithms and data that identify what works for their category, their products and against their targets.

AI is helping everyone more readily and quickly identify the environments that are effective and efficient.

With wider access and awareness of where efficiency lies activity will increasingly cluster to these tried and tested environments.



At this point another principle of media kicks in – share of voice and cut through.

Challenger brands (the lifeblood of indies) will become increasingly outshouted.

Finding new clutter-free environments where clear space exists will allow them to 'punch above their weight'

Indies have this approach in their DNA – it is the hallmark of their success

The more extensive the uptake of AI the higher the value of 'high end thinking'.

Market acceptance and the enlightenment of procurement

Procurement protocols only ever become more rigid but there is a growing recognition and acceptance that Indies are a valid option for every client.

Only Government clients still seem to have a blind spot, unable to find a way to reward local Australian-based agencies (as much as the IMAA continues to lobby for the Australian government to consider Australian agencies in its roster).

Based on these factors identified two years ago indies are now in an even stronger position *and* to strengthen their case yet further there are additional factors at play:

1. The impending reduction of Holdco agency brands

The takeover of Mediabrands by Omnicom will almost inevitably lead to the demise of at least two of their seven agency brands.

The move by WPP to blanket all its brands under WPP Media with a more casual allocation of accounts beneath in an open office format has raised concerns in competitive client categories where marketing plans are of a confidential nature.

It is inevitable that the victims will be smaller clients of the holdcos.

Now burned, those clients would be foolish to look beyond the indies.

2. The diminished importance of the Holdco agency 'Blackbox' and the rise of MMMs.

For decades the holdco agencies have held sway over the allocation of client funds and use of media.

'Computer says' has been the go to phrase to validate and justify the selection both of and within media.

Clients have, in the main, diligently followed the advice provided but now there is a new kid on the block with a louder voice and direct, independent access to the marketing team.

Market Mix Modelling works in a three way partnership with the agency

Market Mix Modelling works in a three way partnership with the agency and client.

The findings are based on more relevant and reliable metrics of sales and spend.

As the reliability (and perceived accuracy) of audience data decreases marketers are leaning into these learnings.

The proprietary tools and systems of the holdcos now play second division to MMMs and the indies are able to operate on a more level playing.

3. The strength of leadership in the independent media agency sector

Take a look at who is leading Australia's independent media agencies. **B&T did an excellent list of their top 10 only a few weeks ago**.

Many of them are well known faces, who have previously held senior roles in holdcos and who are now bringing that accessible expertise to independent agencies and their clients (who perhaps are not used to this level of seniority and engagement).

4. The work of the IMAA

Sam Buchanan and his team at the IMAA have 'upped the ante' and go from strength to strength in unifying and supporting the indie network.

It has raised the profile of indies providing a powerful voice that demands attention and has successfully shifted market perceptions.

The perfect storm of factors mentioned in my initial article has strengthened to almost hurricane force.

Indies are getting hotter and in contrast, for many marketers, on the other side of the ledger many of the holdco agency brands are in an unknown state of transition (eg. **Omnicom's takeover of IPG** and **GroupM rebranding as WPP Media**).

In coming years, the holdcos will need to take a leaf out of the indie playbook and counter some of the inroads they have made. Only then might the temperature in the media agency-land kitchen be turned down.

Stephen Wright is media business director at marketing management consultancy TrinityP3

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