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AGENCIES MARKETING NEW BUSINESS OPINIONS & ANALYSIS

## WHY BEING A 'GOOD AGENCY' IS A ONE-WAY TICKET TO THE MIDDLE GROUND GRAVEYARD



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The Australian agency landscape has officially entered its 'barbell' era (think the gym equipment weight). If you aren't positioned at one of the heavy ends, you're likely standing on a trapdoor in the middle.

According to the latest 2025 data from our [TrinityP3 Agency New Business Report](#), we are seeing a **profound structural shift**. On one side, the Mega HoldCo/Networks are industrialising on a level we have never seen.

ADVERTISING



With Publicis Groupe swallowing Epsilon globally (for a humble \$4.4bn) Atomic 212° locally (for not quite the same amount) and the massive Omnicom-IPG merger concluding, these giants aren't just selling 'ads' anymore, they are building and selling massive, high-tech 'pipes'. They offer marketers a clever integrated platform solution to manage first-party data and plug into global ecosystems that handle the heavy lifting of growth.

On the other side, the Independents are on a tear, moving from a 47 per cent share of wins to a dominant 65 per cent in just 12 months. But don't let those numbers fool you into a false sense of security.

While clients are clearly craving founder-led agility, the independent sector is becoming a crowded, noisy, and increasingly commoditized neighbourhood.

The "Squeezed Middle" is real. To survive 2026, independent agencies need to stop acting

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like generalist “helpers” and start acting like the sophisticated marketers they claim to be. It’s time to apply the



Four Ps to your own shop before the market decides for you.

## 1. Product: Deep Specialisation or Bust

The data shows a “Value Migration” from pipes to poetry. While the big networks own the infrastructure, clients are unbundling specialized services at a rate we’ve never seen. PR and Social pitches alone have tripled.

The winning independents aren’t trying to be “full service” (a term that’s rapidly becoming code for “we do everything average”). Instead, they are developing Specialist Products. This means mastering specific channels like Social and Influencer or, more importantly, developing deep-vein expertise in business categories like Travel, BFSI, or Food Manufacturing. If you aren’t the “Travel Specialist” or the “E-commerce Growth” shop, you’re just another logo in a deck.

## 2. Pricing: Ending the Commodity Curse

The report highlights a move toward “Industrialized Creativity”. With AI now an operational “entry stake,” clients are already looking for the “Efficiency Dividend” – read: fee reductions on automated production.

If your pricing is still tied to cost-based fees (the billable hour), you are effectively penalizing yourself for being efficient. The future belongs to value-based models. Your fee should reflect the value of the outcome and the rarity of your human-led strategic intelligence – the stuff AI cannot replicate.

## 3. Placement: Postcodes are Irrelevant

For too long, being an “Indie” was a geographic label. You were a “Sydney agency” or a “Melbourne shop.” But in a 2026 outlook defined by “Scale Polarisation,” your Placement (distribution) must be global or at least regional.

With the massive “Conflict Churn” coming from the Omnicom-IPG merger, major rival brands in finance and auto will be looking for exclusive, stable partners. Independents need to break out of their local bubbles and offer “best-in-category” services that are attractive to clients regardless of where their head office sits.

## 4. Promotion: Finding Your “Signal” in the Noise

Finally, Promotion. Agencies are notoriously bad at their own marketing. In a market where 441 pitches were recorded in a single year, having a “clear value promise” is no longer optional – it’s survival.

If your promotion is just another reel of pretty pictures, you’re part of the “sea of sameness”. You need to articulate how you solve category-specific problems better than a platform algorithm can. You also need to be clearly articulating how your agency is different in a sea of agencies that to many marketers appear almost identical. You may know why your agency is different but the market only hears it when you are sick of saying it.

## The Bottom Line

The 2025 results also show that the “Agile 500” have the volume, but the “Big Two” have the pipes. The agencies that win in 2026 won’t be the ones with the most staff, but the ones with the most Integrated Intelligence.

If you’re an independent agency owner wondering how to avoid getting crushed in the “squeezed middle,” it’s time to stop looking at what your competitors are doing and start looking at how you are marketing yourself.

Want to go deeper into these trends and map out your survival strategy? I’ll be joining Creative Natives on February 13th for a dedicated webinar where we will explore these

2025 findings from the

Agency New Business Report in detail and discuss exactly how to navigate this two-speed market.

We'll be breaking down the data, the "Conflict Churn" opportunities, and how to actually implement those four Ps to ensure you're on the right side of the barbell. Don't just read the report—learn how to weaponise it.

*Darren Woolley will feature in a webinar, How Indie Agencies Can Win on Friday at 11am.*

**[Register your interest to listen to the webinar.](#)**

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