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TrinityP3 flags rise of the specialist as new business market polarises

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Australia's agency new business market is splitting into two distinct speeds, but the real story isn't just that independent agencies are winning more work. It's that specialisation is fast becoming the price of entry.

That's the central finding from the inaugural 2025 New Business Report from TrinityP3, which analysed close to 450 new business wins and appointments across the past year.

While the data shows independent agencies now account for the majority of wins by volume, TrinityP3 CEO Darren Woolley said the underlying driver is a fundamental shift in how marketers are structuring their agency rosters.

"What we're seeing is a two-speed or dumbbell market," Woolley said.

"On one end, you've got the holding companies all rushing to build platform-driven technology that allows major clients to plug and play. On the other end, you've got more than 500 independent agencies attracting attention because they're nimble enough and agile enough to fit into the gaps marketers are seeing."

Those gaps, he said, are increasingly being created by in-house agency models.

"Marketers building in-house agencies find themselves needing specialist skill sets," Woolley said. "They're going to market to get those from agencies."

At the same time, Woolley said a growing number of medium-sized and large national clients are moving away from single network relationships and back toward best-of-breed rosters.

"They're saying: we tried the big network agency. Now we'll try the big indie agency, or a medium-sized indie agency, and we'll cherry-pick the skill sets we need."

The end of 'just being a good'

The implication for independent agencies is clear.

"In 2026 it won't be enough to simply be a good agency," Woolley said.

"You're going to have to own a very specific positioning in the marketplace. You're going to have to have skills that marketers are actively looking for - not just be an independent creative agency or a media agency."

That positioning, he said, is increasingly moving beyond discipline labels.

"We're seeing agencies start to say: we're retail specialists - both e-commerce and bricks-and-mortar. Or we're travel and hospitality specialists. Or we're performance specialists with deep platform capability," Woolley said.

"It's less about saying 'we're social' or 'we're digital' and more about saying: here is the commercial problem we solve better than anyone else."

Woolley also expects long-standing concerns around category conflicts to soften as agencies build multi-client specialisations.

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“That whole idea that conflicts stop agencies having multiple clients in the same category will start to break down,” he said. “We’re already seeing agencies build multi-category specialties.”

Consolidation creating uncertainty

The report was compiled against a backdrop of mass consolidation across the global advertising industry, including Omnicom Group’s acquisition of Interpublic Group and WPP’s ongoing brand consolidation, including the rebrand of GroupM to WPP Media.

Woolley said that disruption has had a chilling effect on some network new business activity.

“This sample comes from a year when the Omnicom-IPG takeover was hanging over everyone,” he said.

“It also comes off the back of WPP doing another round of brand consolidation. I think the lower numbers are reflective of that uncertainty around what the future was going to look like for holding companies, and that probably put marketers off.”

Despite this, Woolley noted that mid-sized holding groups performed strongly in the rankings.

Enero Group, which owns BMF and Stagwell, which owns 72andSunny, both featured prominently among top performers.

The largest holding companies, however, were largely absent from top creative and non-media rankings, with the exception of media.

“Media holding companies still win around 60% of media pitches,” Woolley said. “But that means 40% are being picked up by independent media agencies. That’s a really interesting picture.”

Plug-and-play vs best-of-breed

Woolley said the divergence highlights two competing visions for the future. Holding companies are betting on integrated platforms and scaled capability. Independents are winning by solving specific, immediate problems.

“The holding companies are promoting the platform solution because in their mind, that’s the future,” he said.

“But in every market – Australia, Singapore, Malaysia, Thailand – there’s still a lot of local business. Local businesses don’t necessarily want a big platform that locks them in.”

For those clients, Woolley said, independence alone is not enough.

“There are opportunities for indies,” he said. “But they can’t rest on their laurels. They need a very specific value proposition and positioning, and they need to bring their top marketing game.”

Looking ahead, Woolley expects the market to become even more intense.

“What this says for 2026 is that it’s a highly competitive and dynamic market,” he said.

“Agencies are going to have to work much harder to articulate who they are, what they stand for, and why they’re different.”

TrinityP3 plans to publish the New Business Report annually, alongside its State of the Pitch research, to track how these dynamics evolve over time.

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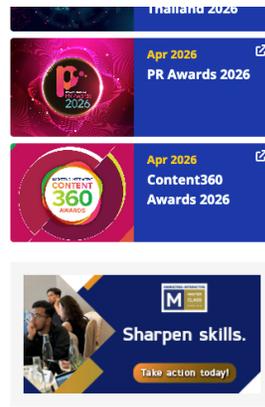
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