# Advertising landscape changes ahead of 2025



The landscape of the national advertising marketplace is poised for notable changes as it heads towards 2025, influenced by a variety of factors including a new U.S. administration and evolving strategies from major platforms and publishers. This dynamic environment has resulted in significant personnel shifts within prominent holding companies, notably at GroupM, where Matt Sweeney has recently stepped down from his role as U.S. chief investment officer. GroupM has yet to announce Sweeney’s successor. This follows Omnicom Media Group's Geoff Calabrese's departure and subsequent transition to a chief commercial officer role at Publicis Groupe.

The current climate has investment executives displaying a blend of optimism and caution. “The words I keep coming back to are chaos and caution,” stated an anonymous executive from a major agency, reflecting the general sentiment surrounding recent market fluctuations. In this context, Jeff Matisoff, a partner at Brandtech Group's Jellyfish, pointed to generative AI as a transformative technology, especially in enhancing media buying workflows. “It started in creative, but it’s here for media — it’s here to save our teams and be valuable to our clients,” Matisoff noted, emphasising the importance of AI in streamlining operations and allowing marketers to focus on more strategic initiatives.

According to findings from the IAB’s 2025 Outlook study, beneficiaries of this evolving marketplace will include connected TV, social media, and retail media, each expected to see double-digit growth this year. On the contrary, linear television is anticipated to face substantial challenges due to declining viewership, particularly given the absence of major events that usually bolster its advertising revenue. The overall ad spend is projected to grow by 7.8%, a decrease from the previous year’s 11.4% growth.

Katie Klein, now chief investment officer at Omnicom Media Group, expressed a positive outlook for 2025, crediting traditional media companies for their investments in technology and innovative delivery methods. “We’re seeing more of a democratization across all of these platforms,” Klein commented, highlighting an emerging variety of compelling options available to clients. The ads marketplace is increasingly complex, combining multiple content elements from various media types into upfront negotiations, creating challenges for agencies that must coordinate these efforts at the holding company level.

In the anticipated outcomes for various media channels, sports advertising remains a particularly attractive area. Klein stated that despite increased inventory from various sports leagues, demand continues to thrive, as evident in Disney’s recent initiatives to make live sports biddable. “Sports has been very healthy,” an anonymous senior investment executive noted, alluding to the relentless advertiser demand for sports programming amidst shifting market dynamics.

Conversely, sectors such as linear TV are projected to suffer ongoing declines, a trend linked to the cord-cutting phenomenon particularly impacting cable networks without streaming alternatives. As for the evolving narrative of brand safety, which has been a significant concern for agencies, an executive remarked that while brand safety remains critical, its impact on pricing appears limited, influenced more by the risk tolerance of individual clients.

The expected growth and decline across various media channels present a clear picture of the 2025 advertising landscape. Notable gainers include online video, social media, influencer marketing, and retail media. Conversely, traditional formats such as print, cinema, and radio/audio are forecasted to see substantial decreases in ad revenue.

In terms of leadership changes in the advertising sector, Dentsu has appointed Giulio Malegori as chairman and acting CEO of Dentsu Americas. Furthermore, Stagwell made its initial acquisition of the year by purchasing Japanese marketing firm ADK Global, extending its reach into the APAC market.

As the advertising industry navigates this transformative period, one thing remains clear: content, supported by strong established IP and franchises, continues to dominate the competitive landscape.

Source: [Noah Wire Services](https://www.noahwire.com)

## Bibliography

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