


OMG



IPM
ADVERTISING
Media & Marketing Factory



azerion



PUBLICIS
GROUPE



JCDecaux



VAR



group^m

CommPass is grateful to its 2025 sponsors



*Welcome at **The Year Ahead***

Mix Bxl, January 27 2025

Agenda

MM Mood Indicator

The Year Ahead – panel

The Mood of the markets: Adspend trends in 2025

The Year Ahead – panel

Round-Up followed by New Years Drink

Moderator Danny Devriendt – MD IPG/Dynamics

Deniz Sariyildiz

Market Place Lead Kantar

MM Mood Indicator

CommPass

EMPOWERING MEDIA PEOPLE



MM Mood Indicator 2024

Bernard Scheray | Deniz Sariyildiz

240185

December 2024

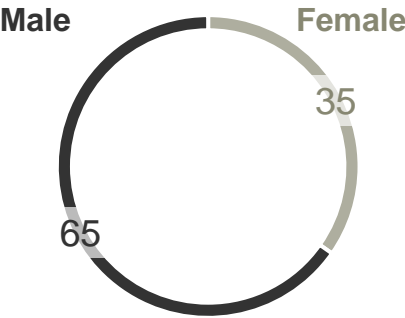
© Kantar 2024



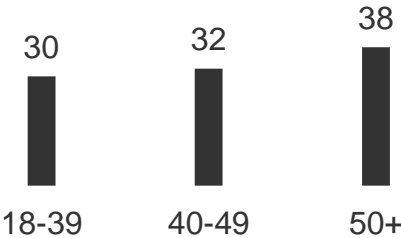
237 interviews, conducted across the whole MarCom ecosystem

Who did we talk to?

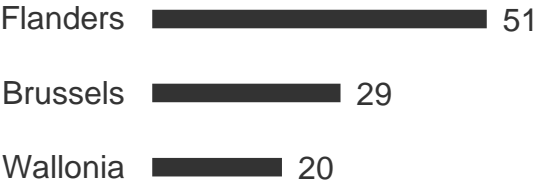
Gender



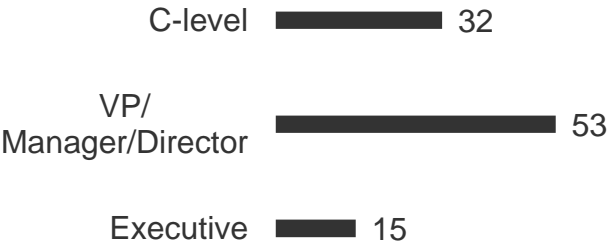
AGE



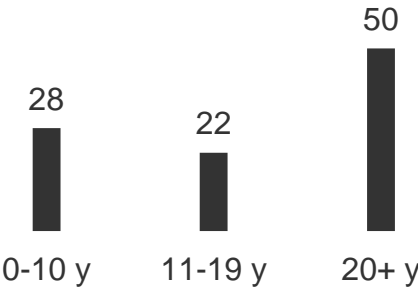
REGION



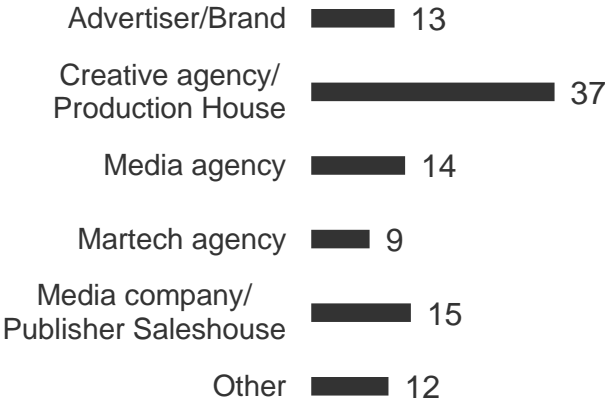
FUNCTION



SENIORITY



SECTOR



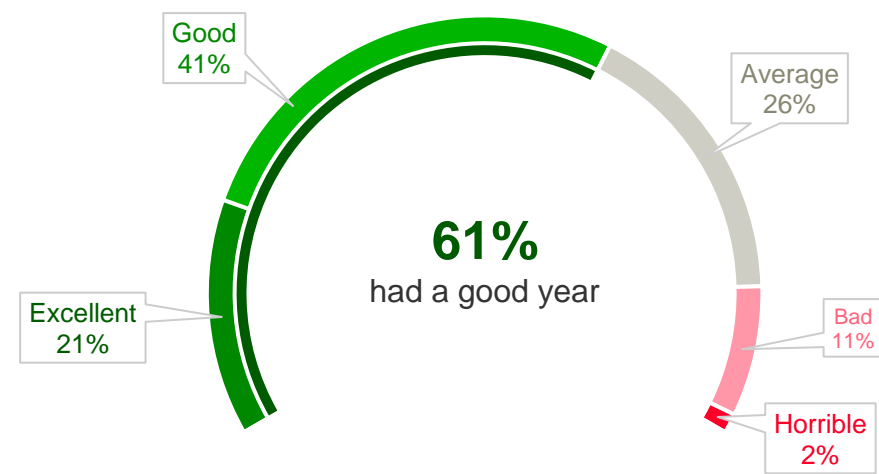
% ON BASE: TOTAL SAMPLE (n=237)

The image shows a large number of small, magenta-colored particles. These particles are concentrated in a dense, roughly spherical cloud in the lower half of the frame. From this central cloud, a vast number of individual particles are scattered upwards and outwards, filling the upper half of the image against a solid black background. The overall effect is one of a massive release or explosion of particles.

Observation 1:
Are there clouds on the horizon ?

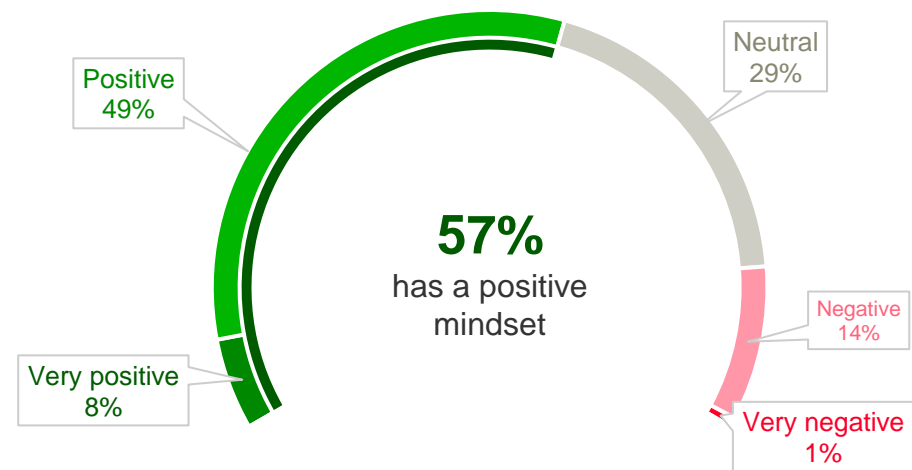
A clear decrease in positivity towards 2025

Evaluation of 2024



	POSITIVE	NEGATIVE
TOTAL	61	13
Advertiser	93	127
Creative agency	97	121
Media agency	82	134
Martech agency	117	37
Media company	104	43

Mindset of 2025 on a professional level

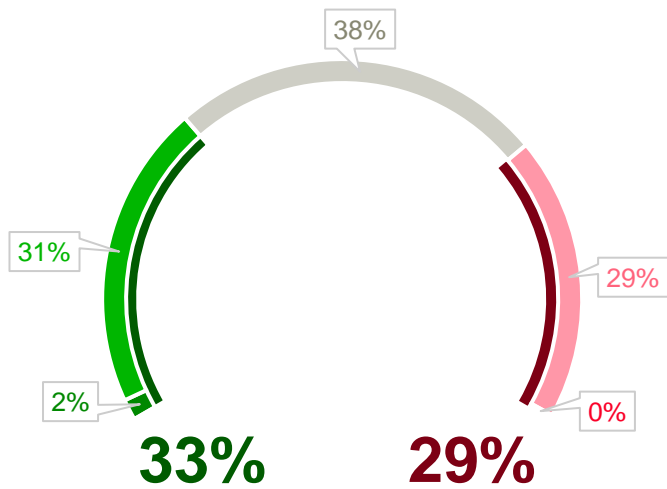


	POSITIVE	NEGATIVE
TOTAL	57	14
Advertiser	106	47
Creative agency	90	151
Media agency	83	144
Martech agency	126	0
Media company	103	39

% ON BASE: TOTAL SAMPLE (n=237)
Advertiser/Brand (n=30) | Creative agency/Production House (n=88) | Media agency (n=34) | Martech agency (n=21) | Media company/Publisher Saleshouse (n=36) | Other (n=28)

2024 versus 2025: clouds on the horizon? Why ?

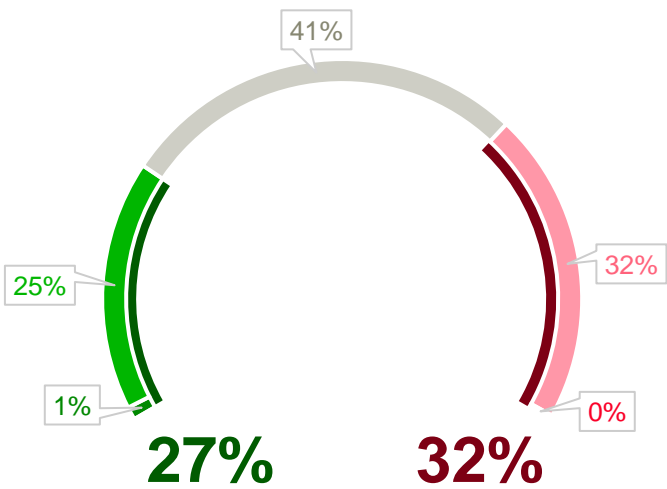
OVERALL MARKET EVOLUTION



POSITIVE NEGATIVE

Advertiser	81	126	Very negative
Creative agency	86	121	Very negative
Media agency	125	71	Very positive
Martech agency	159	82	Very positive
Media company	93	57	

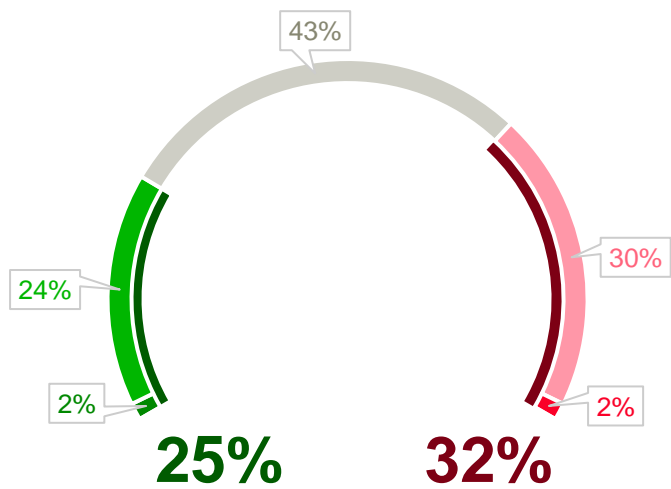
ECONOMIC OUTLOOK



POSITIVE NEGATIVE

50	114	
85	110	
100	73	
179	104	Very positive
136	78	Very positive

MEDIA INVESTMENTS



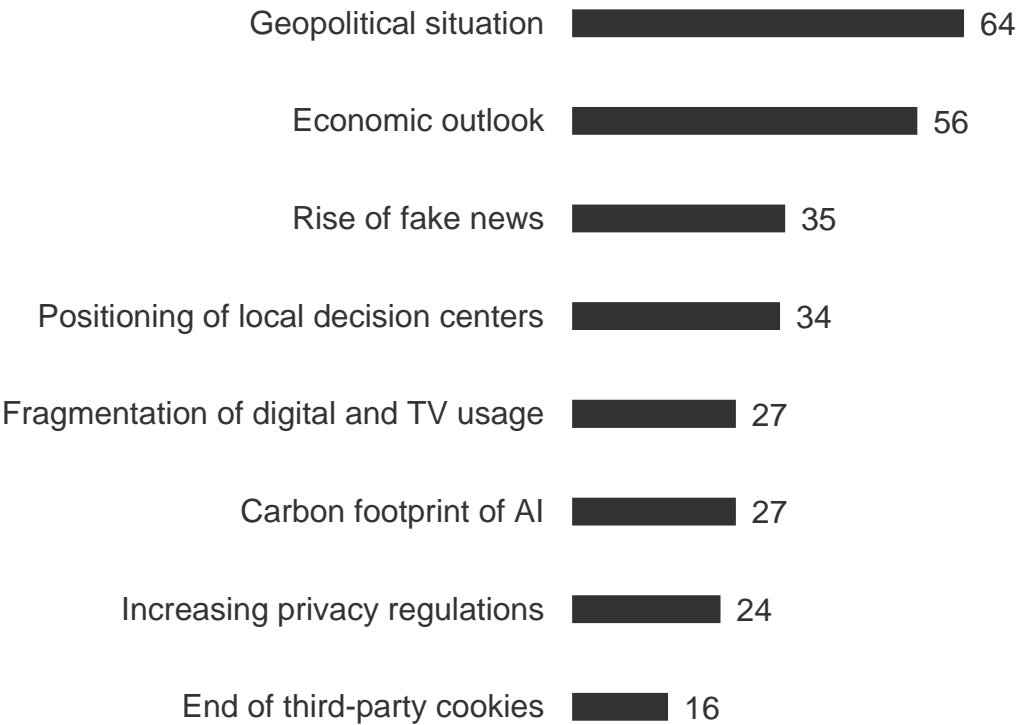
POSITIVE NEGATIVE

106	104	
72	113	
151	110	Very positive
132	89	Very positive
143	60	Very positive

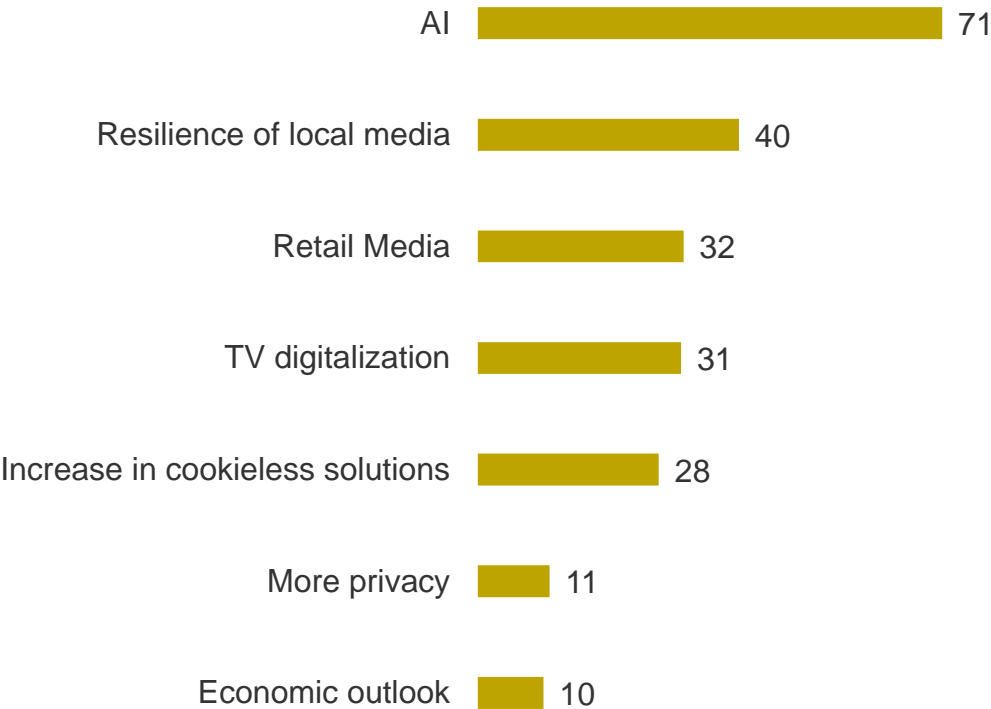
% ON BASE: TOTAL SAMPLE (n=237)

2024 versus 2025: clouds on the horizon? Why ?

Threats



Opportunities



% ON BASE: TOTAL SAMPLE (n=237)

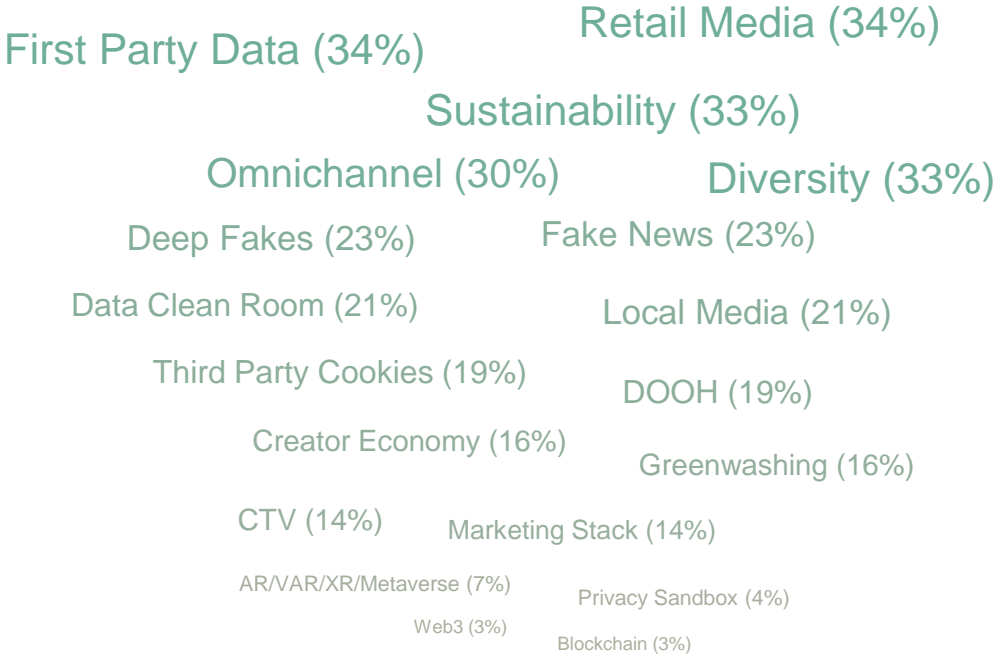
Observation 2:
AI, and nothing else matters???



No surprises, AI is omnipresent

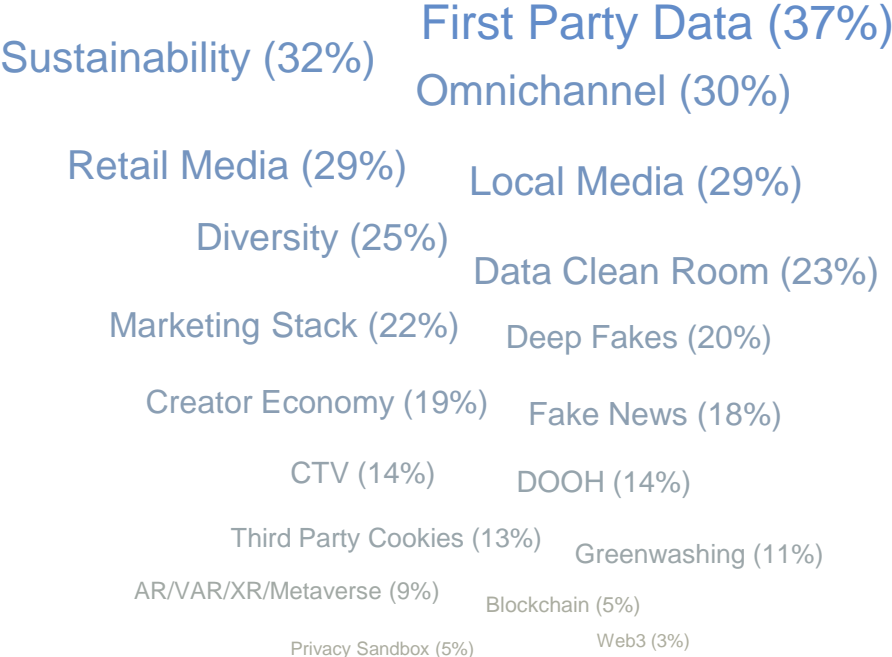
KEY WORDS OF 2024

AI (87%)



KEY WORDS OF 2025









































AI (79%)



% ON BASE: TOTAL SAMPLE (n=237)









































Each sector has its own specificities and focus


What are the main challenges in 2025?

	TOTAL	Advertiser	Creative agency	Media agency	Martech agency	Media
AI/Generative AI	68%	 93	 110	 95	 90	 89
Data Management	31%	 139	 44	 141	 107	 178
Pitch Management	28%	 12	 147	 201	 34	 0
Marketing Automation	25%	 92	 76	 151	 226	 99
Training – Improving Internal Skills	25%	 79	 94	 116	 132	 77
Organization – Bridging Silos	25%	 158	 72	 151	 57	 99
First Party Data Management	25%	 214	 55	 83	 115	 156
Carbon Footprint/Sustainability	24%	 111	 132	 110	 79	 34

Each sector has its own specificities and focus

What are the main challenges in 2025?

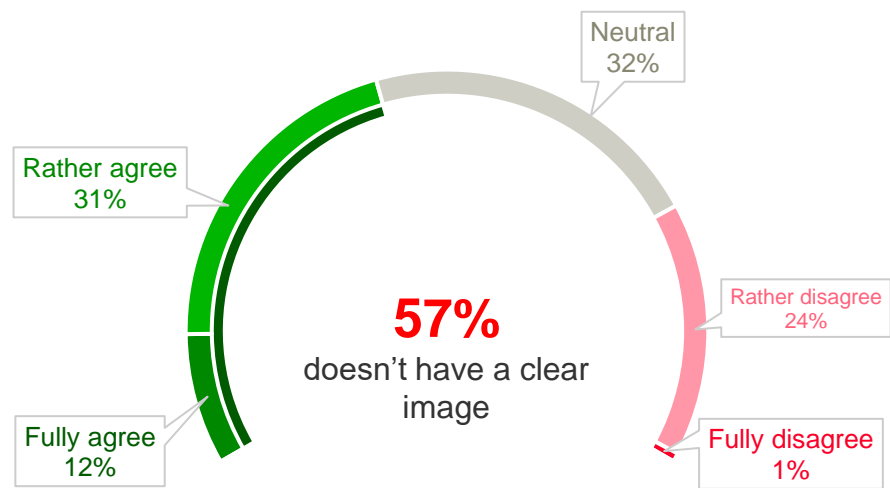
	TOTAL	Advertiser	Creative agency	Media agency	Martech agency	Media
AI/Generative AI	68%	 93	 110	 95	 90	 89
Data Management	31%	 139	 44	 141	 107	 178
Pitch Management	28%	 12	 147	 201	 34	 0
Marketing Automation	25%	 92	 76	 151	 226	 99
Training – Improving Internal Skills	25%	 79	 94	 116	 132	 77
Organization – Bridging Silos	25%	 158	 72	 151	 57	 99
First Party Data Management	25%	 214	 55	 83	 115	 156
Carbon Footprint/Sustainability	24%	 111	 132	 110	 79	 34

The background is a dynamic, abstract composition of numerous thin, curved lines that radiate from a central point on the right side of the frame. These lines create a sense of depth and movement, resembling a tunnel or a high-speed light trail. The color palette is divided into two main sections: the left side is dominated by warm tones including reds, oranges, yellows, and browns, while the right side transitions into cool tones of blues and purples. The lines are most concentrated near the center and become more sparse as they extend towards the edges.

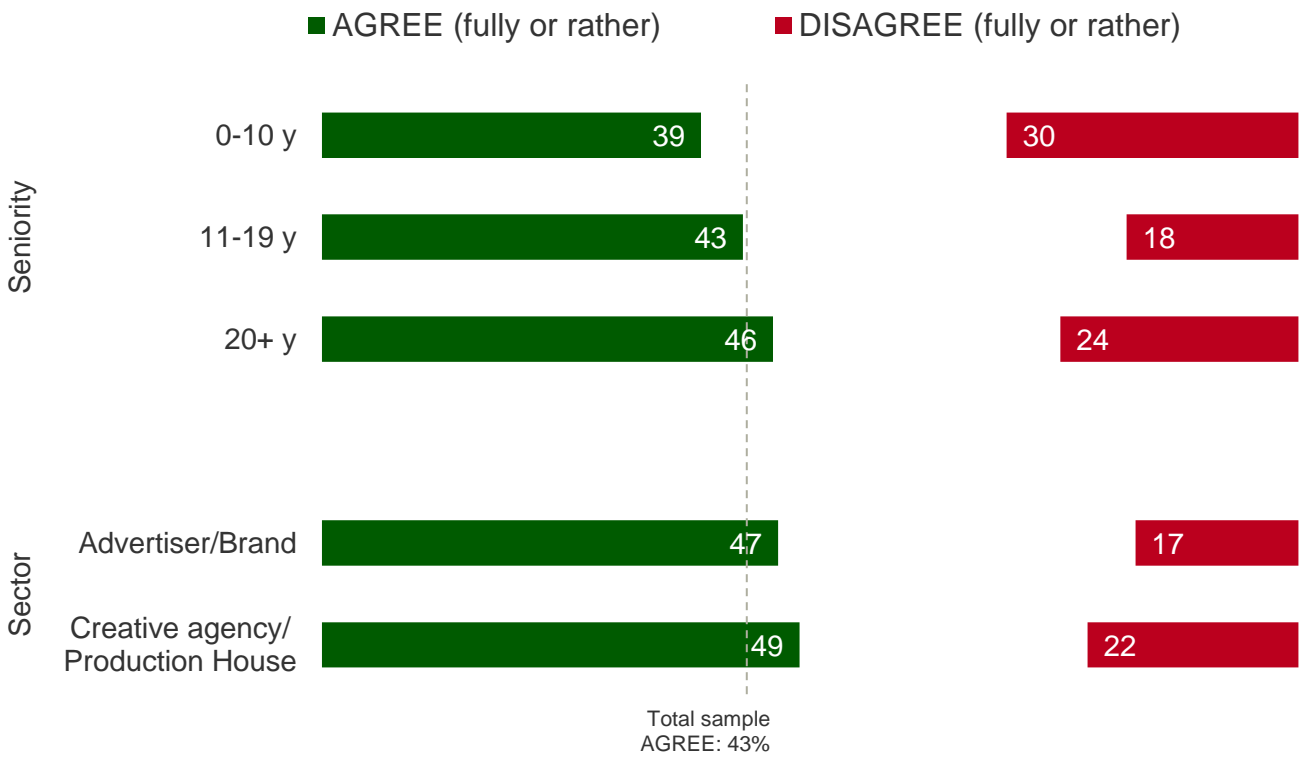
Observation 3:
Agency ? What Agency ?

One in two advertisers doesn't know what each agency stands for

*"I have a clear image of the Belgian creative industry.
I know what each agency stands for."*



% ON BASE: TOTAL SAMPLE (n=237)



Key take outs

- ✓ Our mood for 2025 is one of cautious optimism.
- ✓ Agencies need to differentiate themselves better.
- ✓ Advertisers and agencies live in different worlds. Realizing this is the first step towards change.



MM Mood Indicator 2024

THANK YOU!

Bernard Scheray | Deniz Sariyildiz
240185
December 2024



Panel

Gio Canini

Country Manager WPP BE

Yves Gerard

CEO RMB

Peter Quaghebeur

CEO Mediafin

Valerie Bracke

Head of Marketing CERA

Jonathan Jacoby

Chief Innovation & Data Officer Space

Luc Van Wichelen

Consumer Experience/Media Lead N&W
Europe Mondelez Int.

Vincent Pierquet

Country Manager Tik Tok BE

Veerle Colin

Marketing Director JCDecaux

Francis Lippens

CEO AKQA

The background of the slide is a photograph of a long, dark tunnel with a series of arches. A bright light source is visible at the far end of the tunnel, creating a strong perspective and illuminating the interior surfaces.

Bernard Cools

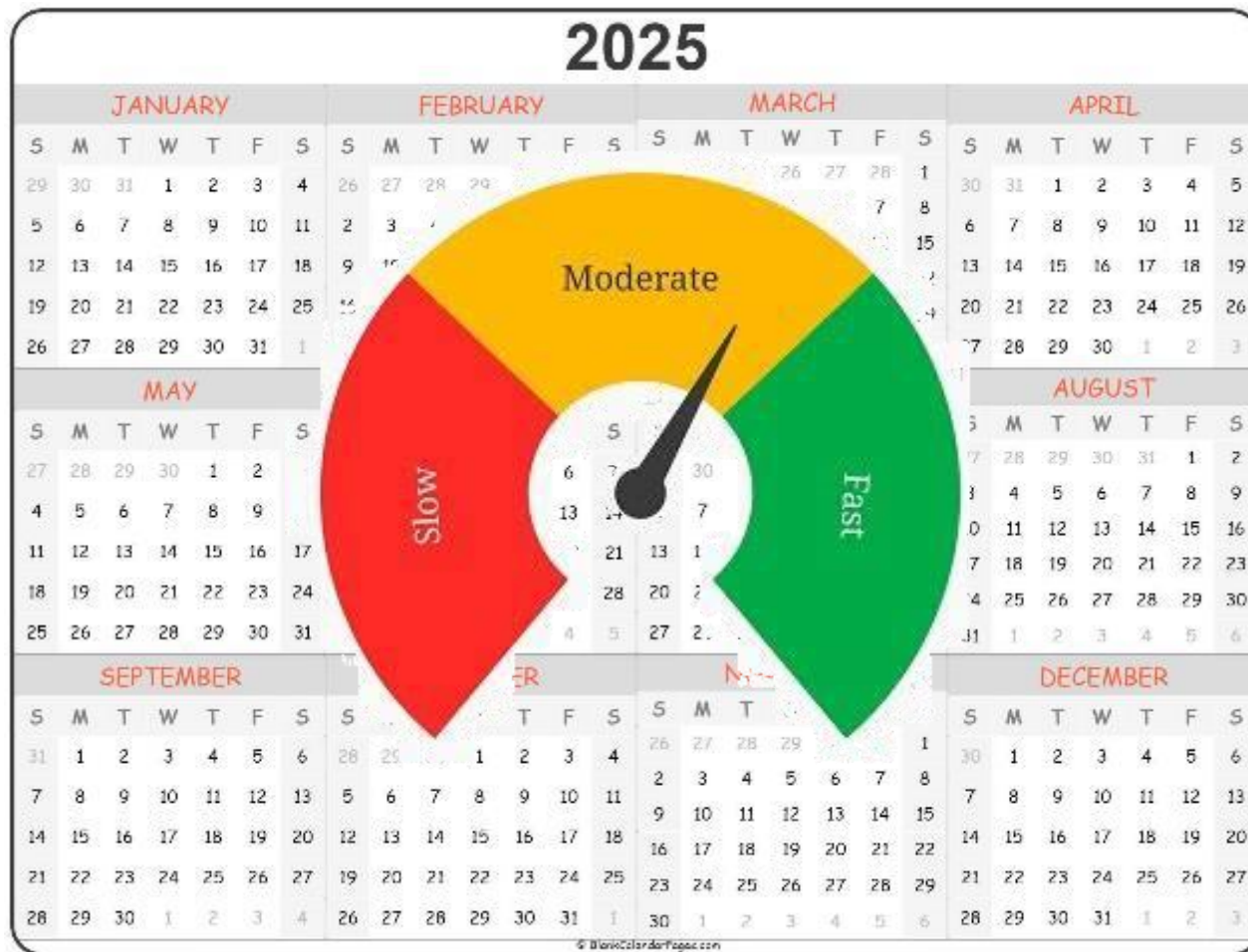
Chief Intelligence Officer Space

***The Mood of the Markets:
Adspend trends in 2025***

'The year ahead'



The mood of the markets adspend trends in 2025





The AI way



ChatGPT

Forecasts for advertising investment in Belgium in 2025 indicate *moderate growth*. According to the Dentsu Group, *an increase of 5.9%* is expected, slightly lower than the 6.8% growth recorded in 2024.

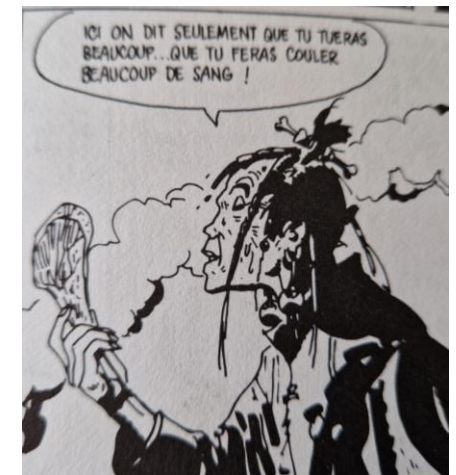
MM

In terms of value, WARC estimates that media investments in Belgium amounted to around €2.8 billion in 2023, with an *anticipated growth of around 3% in 2024*. These figures suggest a continuous, albeit moderate, growth in the Belgian advertising market.

Trends

This outlook indicates a *positive dynamic* for the Belgian advertising market in 2025, with continued growth, albeit slightly *slowed compared to the previous year*.

Guessing what the future holds ?

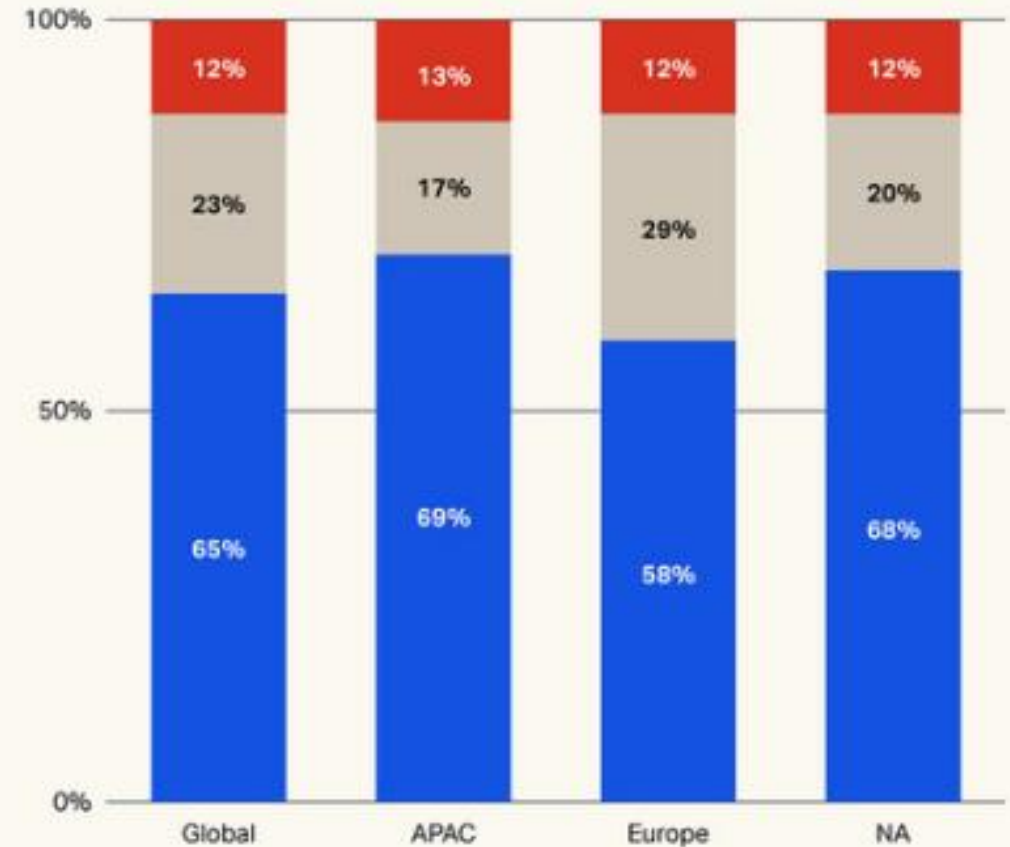


Global: optimistic marketers



Q: Which of the below best describes your business expectations for next year?

■ Better than this year ■ The same as this year ■ Worse than this year



Global: optimistic adspend forecasts



ARCHIVE



READ LATER

INTELLIGENCE

Reclamebestedingen 2025: dentsu mikt op +5,9%

Dinsdag 3 December 2024



ARCHIVE



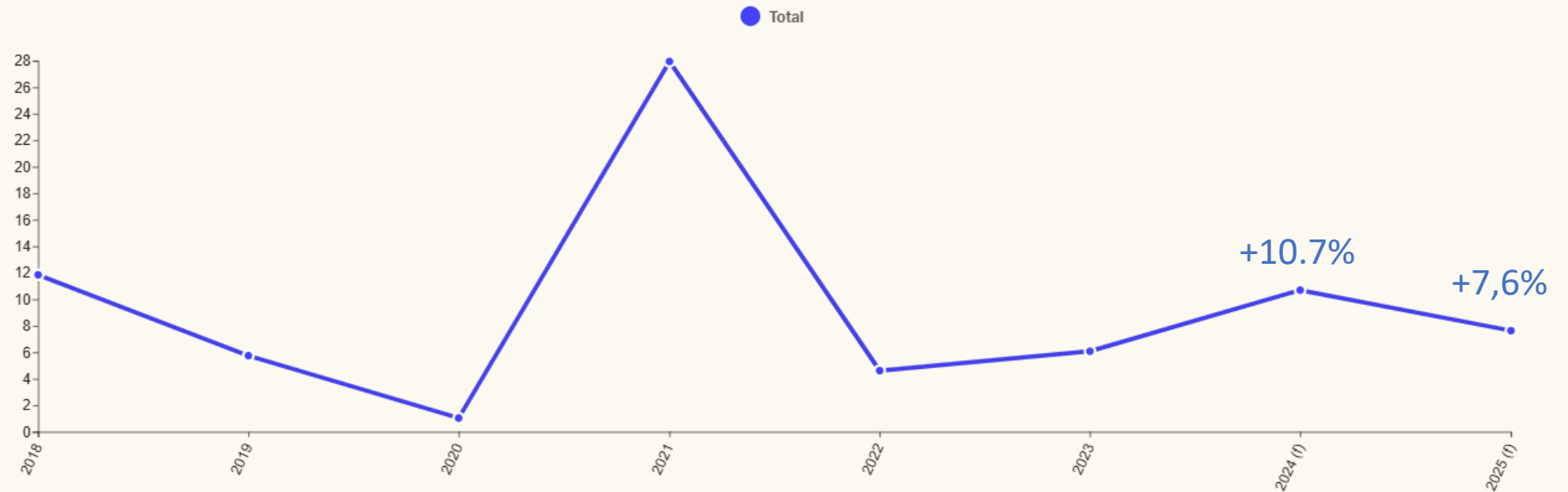
READ LATER

INTELLIGENCE

1.000.000.000.000 dollar reclamebestedingen: check!

Woensdag 27 November 2024

Year-on-Year Percent Change, Local Currency, Current Prices



Global: optimistic forecasts, but not for everyone...

ARCHIVE READ LATER

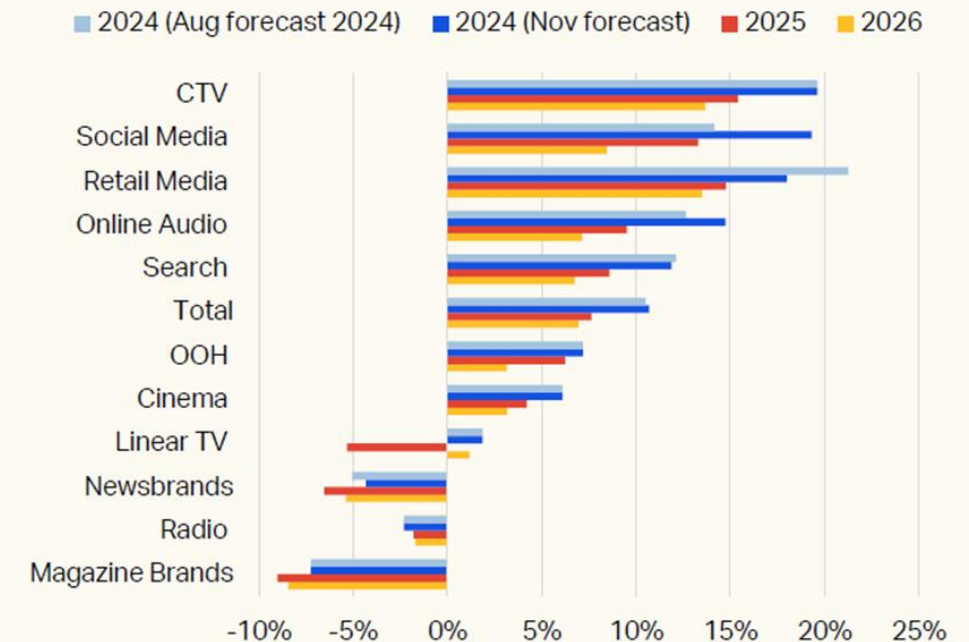
INTELLIGENCE

Vooruitzichten 2025: meer dan 7 op 10 bestede euro's in zakken van pure players, aldus GroupM

Donderdag 12 December 2024

Global ad market grew 10.7% in 2024, with online media leading the charge

Forecast year-on-year % change, Nominal



Note: Downgrade to retail media forecast in 2024 is due to availability of new 2023 data from previously unmonitored platforms.

Source: WARC Media. 2024. Global Ad Spend Outlook 2024/25 – Q4 update. Read more on our data and methodology [here](#).

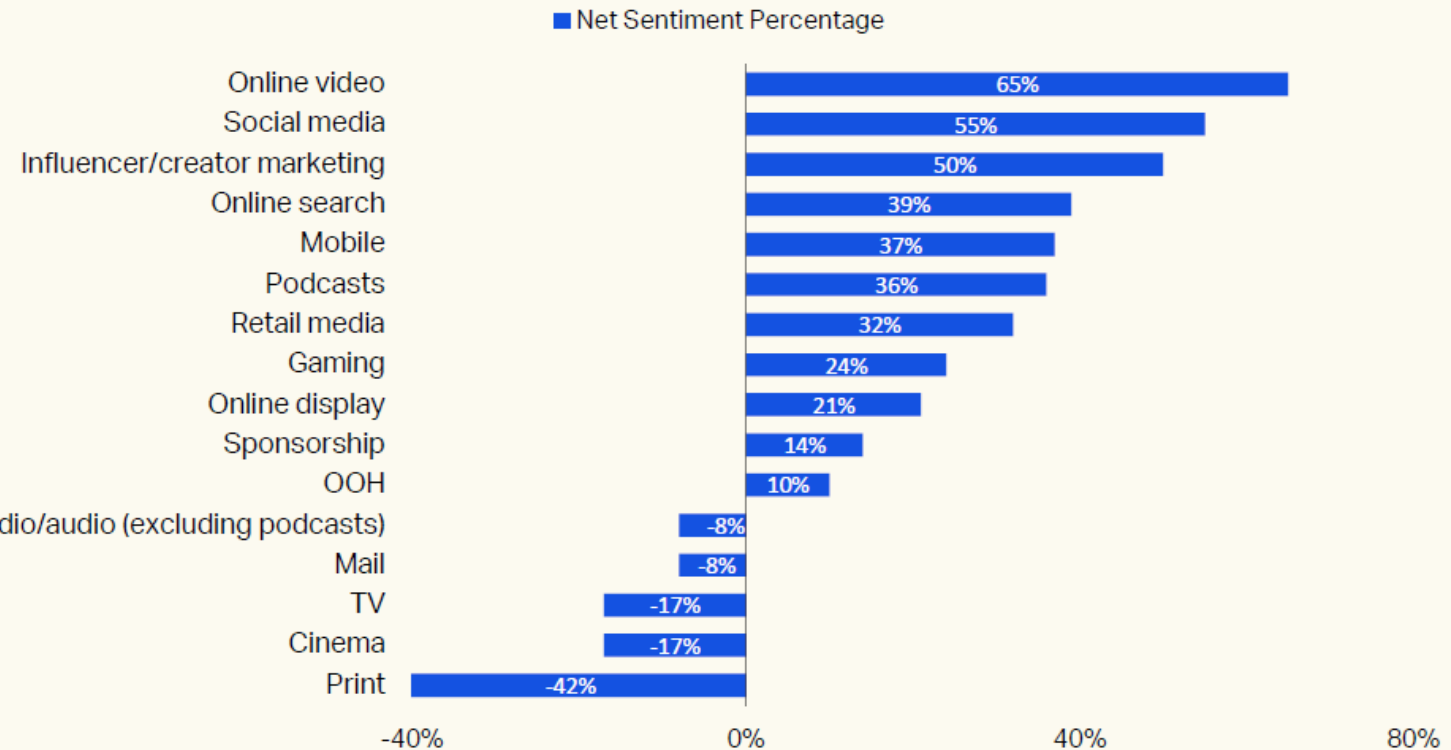
Global: the enduring drive of digital



Online

(Mainly)
offline

Q: How do you expect investment in media channels to change in 2025?



Note: Net Sentiment Percentage equals the percentage of respondents that expect investment to increase minus the percentage of respondents who expect investments to decrease.

Source: WARC. Voice of the Marketer report. 2024.

In the meantime: world still in turmoil



Source: UK MoD / Institute for the Study of War (21:00 GMT, 4 April) **B B C**



OK, what about Belgium ?

Back one year ago



New estimate:

Max +3,3% in 2024 vs 2023 Current: +7,6%

+1% in constant
(media inflation forecast $\pm 2\%$)

Constant:
+3,9%

Possibly less for Belgian media:
growth goes to digital, with >60%
of it going to GAFAM...

The context



More on the context

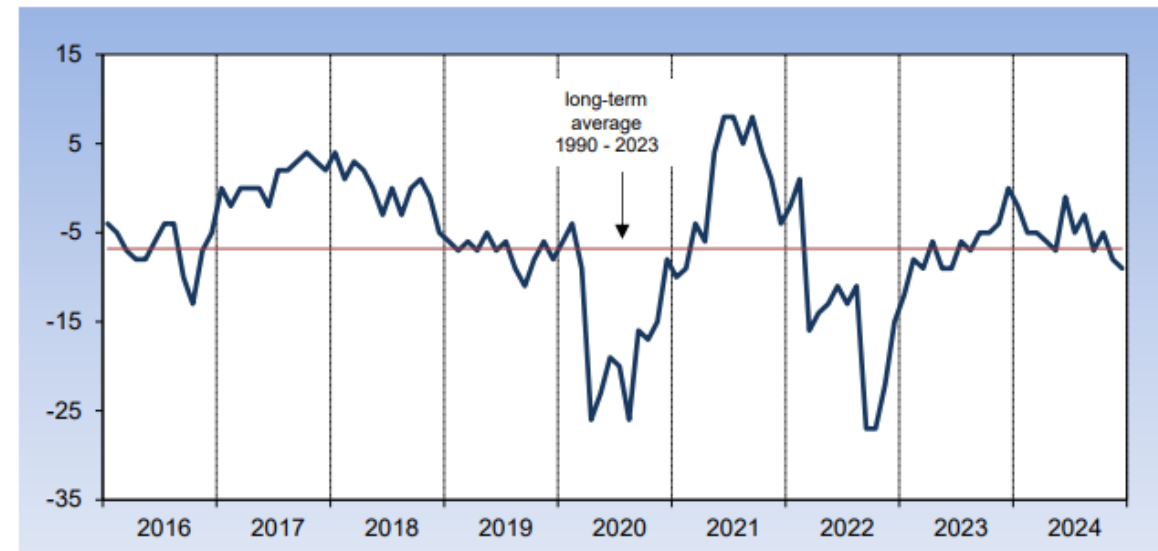
Drop in business confidence in December

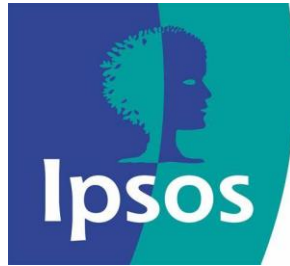
The business climate deteriorated significantly in business-related services, followed by trade and manufacturing. In contrast, confidence strengthened in the building industry for the third month in a row.



DECEMBER 2024

CONSUMER CONFIDENCE INDICATOR





Snapshots of consumer sentiment

% agree



Prices will rise a lot/little

71%

65%

Cost of food shopping will rise a lot/little

75%

72%

Own standard of living will fall a lot/little

27%

23%

Taxes you pay will rise a lot/little

63%

59%

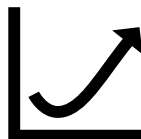
The number of unemployed people
will rise a lot/little

63%

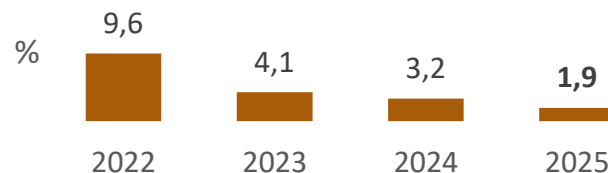
58%



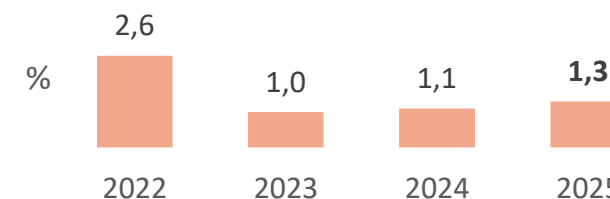
What the experts tell us about 2025



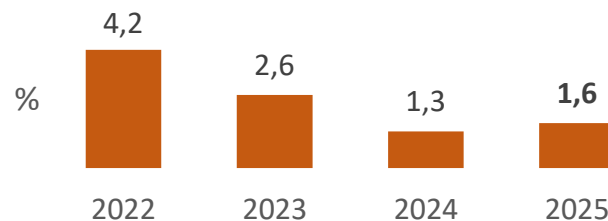
Consumer price index: +1,9%



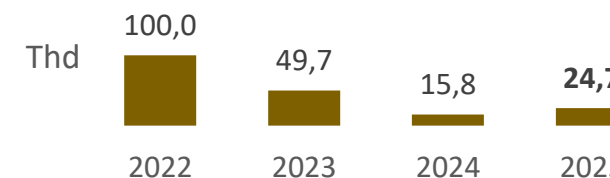
GDP: +1,3%



Private consumption: +1,6%

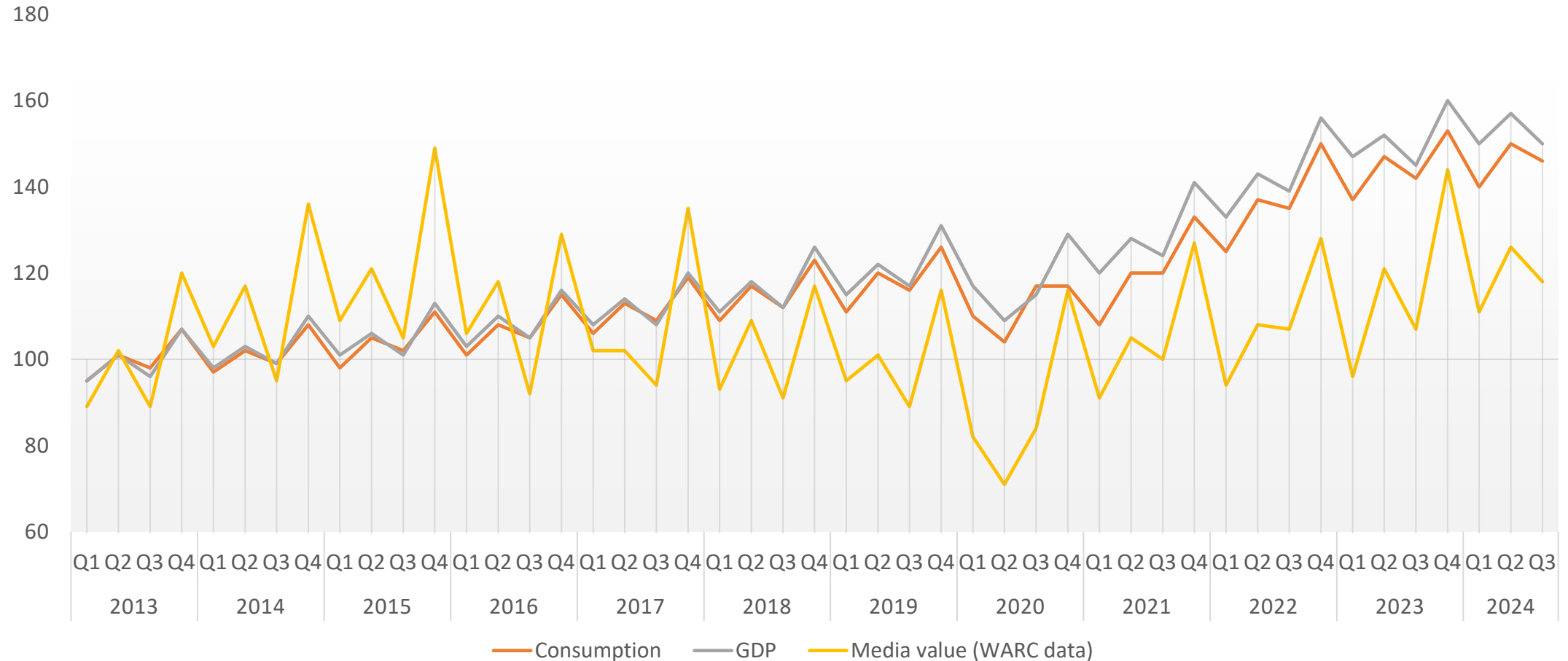


Employment: +24.700



Media & adspend far more volatile than the economy... and they don't grow accordingly

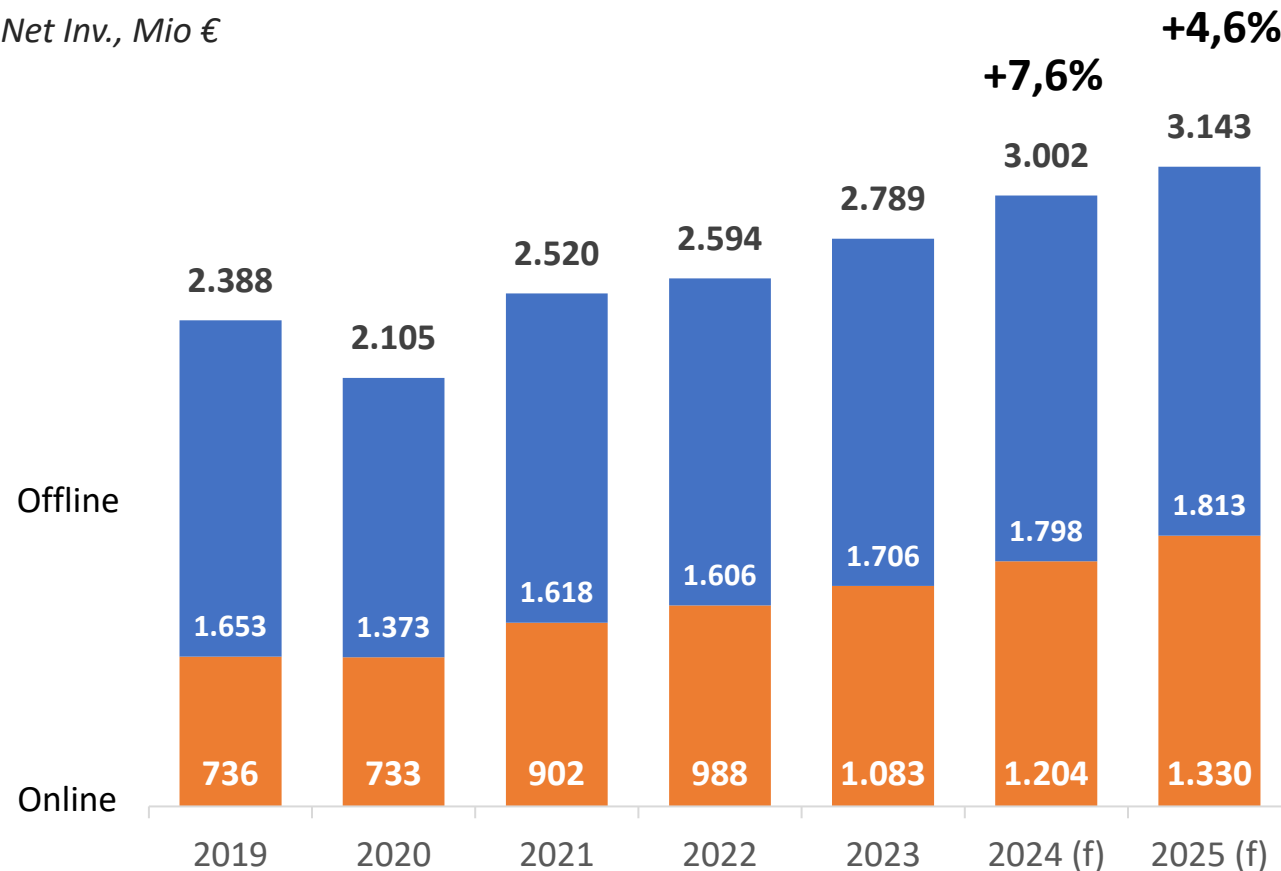
Index GDP, private final consumption & paid media value (2013=100)



Sources: Statbel, Eurostat, WARC

WARC estimates for Belgium

Net Inv., Mio €



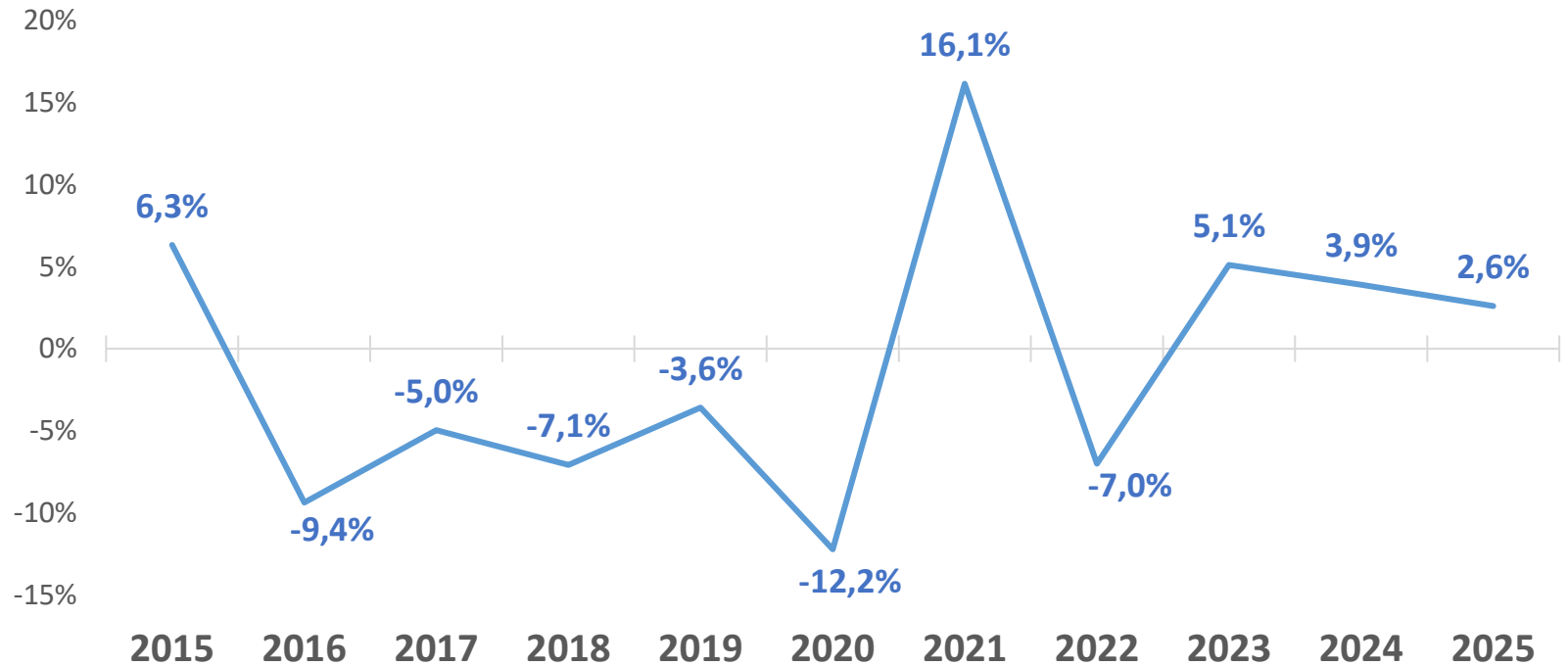
Realistic ? Unfortunately no hard benchmark !

Consistent dichotomy **online** (+10,5%) vs **offline** (+0,8%)

WARC view on constant evolution

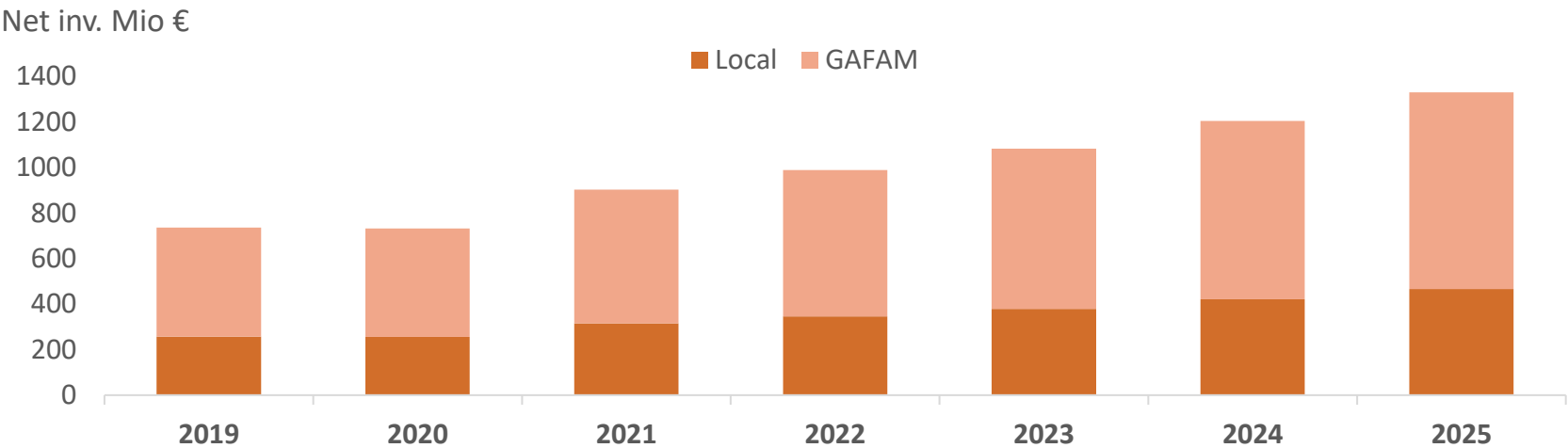


Year on year difference on total paid media value



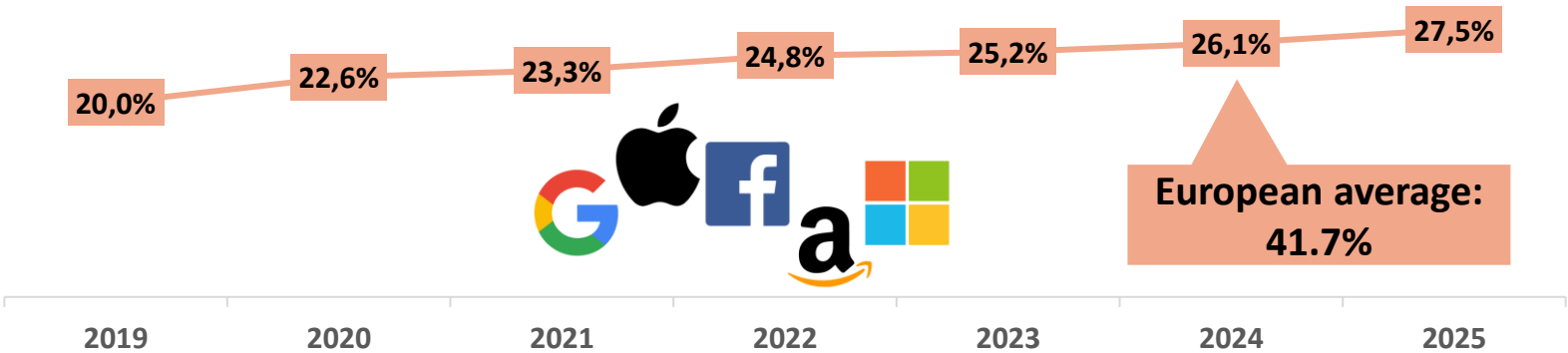
More about digital

Development digital volume



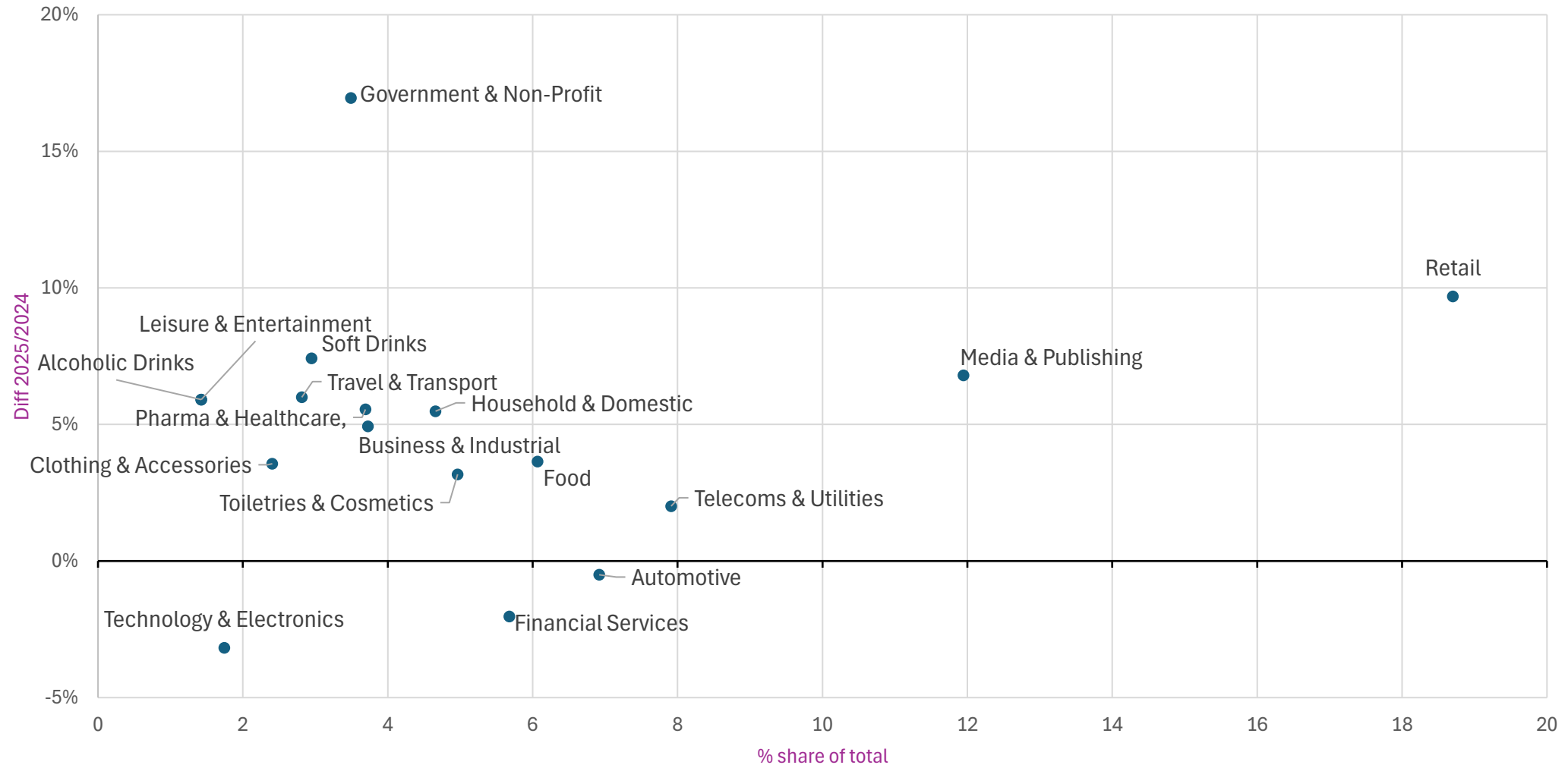
Assuming **GAFAM**
= 65% of digital

Share of GAFAM in total cross media





How are categories expected to invest



Another reason why



What is YOUR OWN mood?



The mood of the markets adspend trends in 2025

