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Pitch satisfaction dips: Shifting budgets, fast turnaround and more for less

By AdNews | 2 April 2025

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Marketing consultancy Trinity P3's annual State of the Pitch report has found an overall decline in pitch satisfaction, with the average rating dropping to 2.99 from 3.13 out of 5.

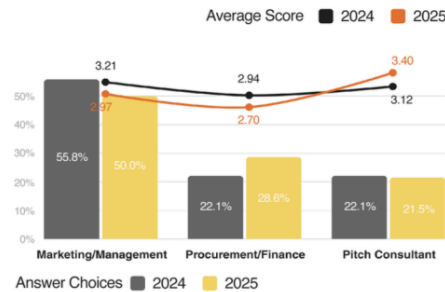
According to the survey, now in its second year, creative pitches were rated the lowest (2.88), while tech/digital scored the highest (3.86).

TrinityP3 global CEO Darren Woolley said if the pitch were graded using the American grading system, it feels like this year pitching in Australia went from a C- to D+ in the eyes of many agencies, which I'm not sure is cause for celebration.

"This is the second year we have run the survey, and what we are seeing is nothing is improving. Under the downward economic pressure, many aspects of the pitch process are getting worse," Woolley said.

This year's survey ran over six months and captured data on some 70 pitches which varied in spend from around \$50,000 to \$10 million across 24 different industry categories.

It represents a sample of half of the pitches run across Australia and New Zealand for the period. Pitch consultants ran only 21.5% of the pitches in the 2025 survey (down from 22.1%).



Who primarily ran the pitch process?

"This year's survey highlighted how marketers struggle for more empowerment and decision-making ability," Woolley said.

"We're definitely seeing an uptick of direct CEO/broader C-Suite involvement in pitches, and also 'local-global' pitches where the scope is local but the client is compelled to seek sign-off from regional or global leadership.

"And finally, we are seeing the category-specific experience of procurement in marketing going backwards, which presents challenges for all concerned.

"As we saw last year, many marketers continue to boil the ocean in their search for the right agency. It doesn't need to be that way, and it shouldn't be. This year we had agencies reporting pitch lists of between three and up to 13 agencies. Now some clients will have open tendering requirements, but you have to wonder what the refining time is like on a pitch like that."

Among the key findings of the report: 78% were an opportunity to win a new client, 77% did not have an online tendering system, 87% did not pay agency pitch fees, but 66% did require the agency to prepare speculative creative work, a media trading exercise or both.

Over half the pitches were reported as taking between two and three months.

"The issue of marketers paying or reimbursing agencies for their time and effort remains a very real one," Woolley said.

"The reality is that a pitch draws agency time, effort and resources, even when it is run well. Agencies should ideally be reimbursed for that time and effort, even if it is just covering some of the hard costs which come with pitching. This remains an area of clear 'need for improvement' for many players."

The report also looked at which industries were pitching with the categories of Public Sector (7 pitches), Health Care Products, Beauty & Pharmaceuticals (7), followed by Banking, Financial & Insurance Services (6) dominating.

National pitches again dominated, representing 75.7% this year, up from 63.6%. Interestingly, regional pitches dropped from 32.5% to just 8.6% in the survey. While local/state based pitches accounted for 14.3%, this was the first year TrinityP3 asked for this level of data.



Trinity P3

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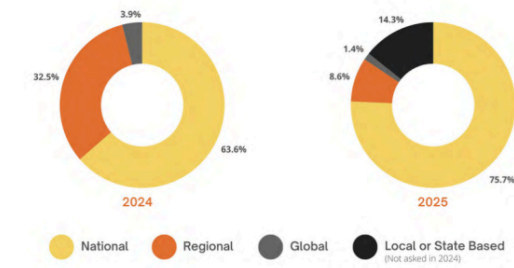
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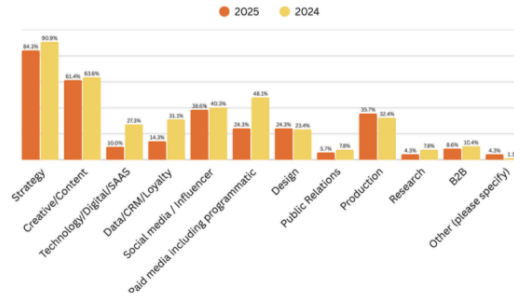
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Clients' needs are also rapidly evolving, while strategy and creative/content remains a major focus of pitch requirements. Social media/influencer and production make up the top four capabilities that clients are seeking when they pitch.



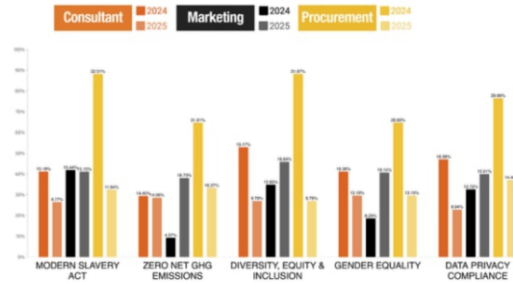
"It's no surprise that strategy reigns supreme," Woolley said.

"What is interesting is to see the uptick in 'Production'. We definitely see clients placing greater emphasis on stress-testing agency approaches to production, and within this, level of AI maturity.

"We are seeing a relatively high level of disparity in agency responses to these questions. We predict that AI-enabled production will only become bigger as a pitch battleground."

The list of client compliance measures, especially in the data privacy space, has also increased significantly as part of the pitch process.

TrinityP3's report highlights a stronger emphasis in procurement on cost reduction rather than on risk mitigation, the structure of marketing categories, the role procurement plays in those businesses, or possibly a shift away from measuring ESG compliance.



"While the reporting period captured H2 of 2024, it feels like ESG and DEI appear to be less of a priority than last year," Woolley said.

"Anecdotally, this feels like there are clients, particularly if they have US operations, moving away from this area as a focus/priority."

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