

Trends and Insight

# Agencies' Pitch Satisfaction Sinks "From a C- to D+": 2025 State of the Pitch Report

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"When marketers keep boiling the ocean, they risk drowning their best potential partners," TrinityP3's Darren Woolley tells LBB's Tom Loudon, as 87% of agencies report unpaid work and extended timelines



Australian marketers and procurement teams have scored 2.99 out of 5 from agencies in this year's 'State of the Pitch' report, a worsening of last year's 3.13. The drop reflects growing frustrations over unpaid work and economic pressures reshaping pitch processes.

"If the pitch were graded using the American system, Australia went from a C- to D+ this year," said Darren Woolley, global CEO of TrinityP3.

"That's not something to celebrate when we're seeing fundamental aspects of the process deteriorate."

The annual report by the leading pitch consultancy surveyed agencies on 70 pitches across 24 industries, with marketing spends ranging from AUD\$50,000 to \$10 million. Creative pitches fared worse at 2.88, while tech and digital scored highest at 3.86.



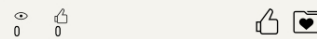
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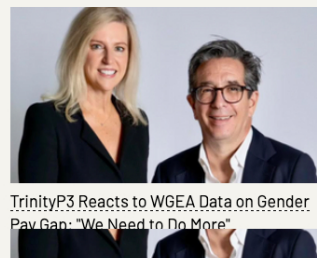
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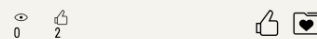


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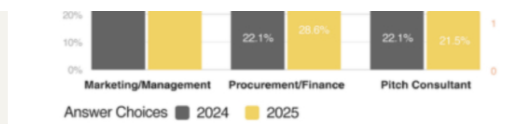
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The findings reveal systemic challenges in how agencies and marketers collaborate. Some 87% of pitches provided no fees to agencies, while 66% demanded speculative creative work or media trading exercises. Over half of the pitches took between two and three months to complete, with some involving up to 13 competing agencies.

"This is the second year we've run the survey, and nothing is improving," Darren said.

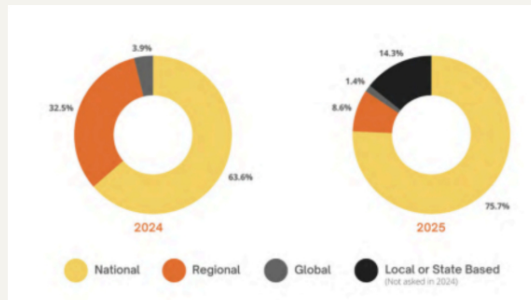
"Under economic pressure, we're seeing procurement teams focus on cost-cutting rather than partnerships. Marketers continue to boil the ocean in their search for the right agency.

"Economic uncertainty means procurement focuses on risk mitigation and cost-cutting.

"Marketers and agencies talk about partnerships, but financial pressures reduce agencies to vendors."

Darren also noted declining category-specific expertise among procurement teams, coupled with increasing involvement from CEOs and global leadership in local pitch decisions.

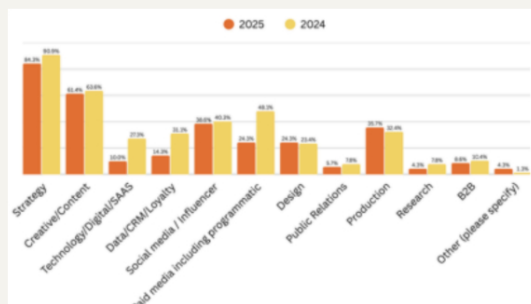
"We're seeing more 'local-global' pitches where the scope is local but requires sign-off from regional or international leaders," Darren explained. "This creates delays and often misunderstands market nuances."



75.7% of pitches were national in nature, up from 63.6% last year, while regional pitches dropped sharply from 32.5% to just 8.6%. The most active industries included the public sector (seven pitches), healthcare products (seven), and financial services (six).

Client requirements continue to evolve, with strategy and creative content remaining the top priorities. However, the report noted growing demand for production capabilities and AI integration.

"It's no surprise that strategy remains paramount," Darren said. "But we're seeing clients increasingly stress-test agency production approaches, particularly their AI maturity. There's wide disparity in how agencies handle these questions."



The findings show data privacy compliance demands have increased significantly, while emphasis on Environmental, Social, and Governance (ESG) and Diversity, Equity, and Inclusion (DEI) initiatives appears to be waning compared to 2024.

Pitch consultants ran just 21.5% of surveyed pitches, down slightly from 22.1% last year. The remaining processes were managed

internally by clients, often without specialist marketing procurement support.

"Some marketers admit they're out of their depth," Darren said. "When procurement lacks category expertise and economic pressure mounts, you get extended timelines, unpaid work, and frustrated agencies."

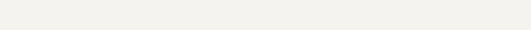
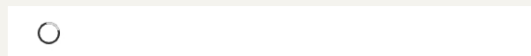
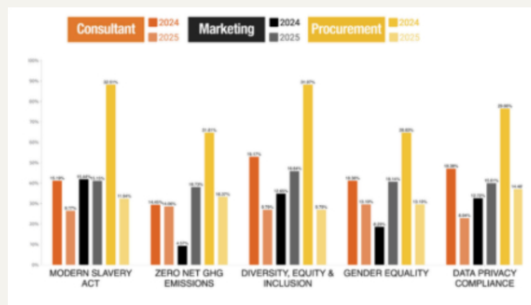
The report also reveals that 77% of pitches didn't use online tendering systems, while 66% required speculative work without compensation. These factors contribute to what Darren calls "an unsustainable model" for agency-client relationships.

TrinityP3 will rerun the survey from 1 July 2025 to track whether trends improve or worsen. "It's a vital litmus test for the industry," Darren said. "So far, every pressure point is intensifying."

The findings come as marketing budgets face increased scrutiny globally. While the report focuses on Australia, Darren noted similar tensions in other markets where economic uncertainty affects creative industries.

With satisfaction scores declining and economic pressures mounting, the report paints a challenging picture for Australia's marketing sector.

Darren warned, "When marketers keep boiling the ocean, they risk drowning their best potential partners."



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