Trends and Insight

Aussie H1 Pitch Movements Prove Clients Are Willing To Rethink "The Old Narrative"

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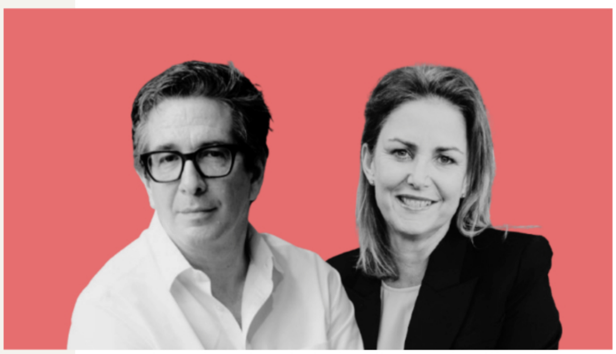
The first half of 2026 saw major accounts go to indies, accounts split over multiple agencies, and the industry leaning into "flexibility as a survival mechanism." Tumbleturn Marketing Advisory's Jen Davidson and Trinity P3's Darren Woolley unpack these trends and what they mean with LBB's Tess Connery-Britten.



A series of high-profile account movements has characterised Australia's agency pitch market in the first half of 2026, pointing to broader structural changes across the industry. From major brands moving away from long-standing agency relationships to the rise of hybrid agency models, clients appear increasingly willing to rethink traditional approaches to agency partnerships.

Among the year's most notable developments were the decisions of KFC and Commonwealth Bank to appoint new creative teams after over 14 years with their respective incumbents, Ogilvy and M+C Saatchi.

Jen Davidson, managing partner of Tumbleturn Marketing Advisory, told LBB the shifts were "a real test of the old assumption that big clients need a global network agency.

"Switching used to be a massive undertaking, but tech now makes transitions far easier, lowering the barrier to change. AI and automation are also reshaping creative and production faster than media, opening up more flexibility in how brands choose partners."

With Commonwealth Bank moving to Howatson & Company in June, KFC adding Sunday Gravy to its roster in May, and Domino's partnering with the Bureau Of Everything back in March, Trinity P3 CEO, Darren Woolley told LBB there is “a fascinating tension playing out right now between holding companies and independent agencies.”

“We’ve seen massive, traditional accounts move to indies, which completely challenges the old narrative that independent agencies can't handle enterprise-scale business," he said.

He added “indie dominance” has also permeated media procurement.

“Independent agencies like This is Flow picking up Cranky Health, and Sandbox Media locking in Sydney Zoo prove that the indies are firmly holding their ground across all disciplines.

“That said, holding companies aren’t sitting still. They are still winning massive consolidations where global scale and network tech matter. For instance, Australia Post moved to Accenture Song, and Asahi’s major media account went to Mindshare."

As well as a new media partner, in June, Asahi Beverages locked in new creative agencies. Going ahead with a new model, the brand brought together Kerfuffle and BMF as creative partners to oversee work on Asahi’s brands.

Under the remit, independent agency Kerfuffle will lead on Carlton, Great Northern, Vodka Cruiser, Woodstock, and Schweppes — meaning Kerfuffle co-founder, Ant Keogh, gets his hands back on the Carlton account 20 years after Carlton Draught’s ‘The Big Ad’. BMF, meanwhile, will lead the work for Victoria Bitter, Hard Rated, Solo, and Solo Energy.

"The Asahi movement is the perfect case study for the modern client mindset,” said Darren.

The decision to split the business tells us, he added, indicates "big clients are moving away from the rigid, 'one-size-fits-all' agency of record (AOR) model to seek more bespoke orchestration.

"As we saw last year in the 2025 New Business Report, clients want the 'best of both worlds': The structural scale, data infrastructure, and global buying clout of a holding company network, and the cultural agility, speed, and senior-level devotion of an independent agency.

“Instead of compromising, clients are building hybrid rosters. They are essentially saying, 'We will give our heavy-lifting infrastructure to the networks, but we want our creative edge and fast-turnaround innovation to come from indies.' They want custom-built models that fit their specific business friction points, rather than forcing their business into an agency’s pre-existing corporate structure."

The implications of these decisions extend beyond individual account wins and losses, and point towards a market increasingly driven by flexibility, specialisation, and access to creative talent — regardless of agency ownership model.

For Jen, the increasing experimentation with agency structures is the result of "a clear move toward deep specialism within a client's agency village — the most notable shift in the last 18 months.

“Clients are accepting that one agency can rarely cover the depth of capability their broadening remit now demands. [I’m] expecting to see more of this, particularly in portfolio businesses."

Despite these shifts, Jen said the fundamental client priorities have remained largely unchanged.

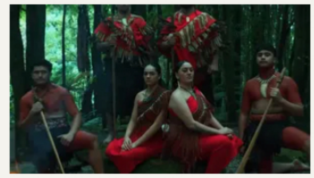
"What clients want is constant: creativity and innovative thinking. For decades, that talent was the stronghold of big global network agencies. In recent years it seems to be migrating to independents, and clients are increasingly open to reshaping their agency village to get it."

Overall, Darren argued, "The overriding theme across the market right now is flexibility as a survival mechanism.”

Whilst macro-economic uncertainty “is driving a lot of experimentation,” he said, “it goes deeper than just trying something new for the sake of it — it’s about structural de-risking.”

Looking across the categories in the H1 data, a few things jump out to Darren. The first is the rise of specialised and project work.

“Look at major players like Qantas utilising Droga5 for project work, or



ALL THEIR WORK

Luxaflex using Bashful for a project. Brands are hesitant to lock themselves into massive, long-term retainer structures when consumer sentiment is shifting month-to-month. They want the ability to dial spend and agency resources up or down without contractual friction."

He has also spotted a 'social-first' shift in fast-moving categories.

"Categories like FMCG, auto, and fast food are heavily experimenting with dedicated social and digital agency structures rather than relying on their traditional creative agencies for everything," Darren said.

"Look at Honda appointing Wired.co for social, El Jannah moving to alt/shift/, or Channel 9, Canva, and Hungry Jack's all appointing Swan Studios for social in April. These brands realise that to stay culturally relevant in a tight market, they need specialised, rapid-response content engines.

"Ultimately, the market is telling us that the traditional boundaries of what an agency roster 'should' look like are gone. Clients are treating their agency setups like software. They want a modular, plug-and-play architecture where they can swap out components as market conditions dictate."

Darren Woolley

CONSULTANCY

Tumbleturn Marketing Advisory

MANAGING PARTNER

Jen Davidson

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