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Creative Indies Dominate Pitches, While Social-Only Pitches Soar

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London, UK

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TrinityP3 CEO Darren Woolley told LBB's Tom Loudon the pitch consultancy's latest report shows indies won 285 pitches against network agencies' 156

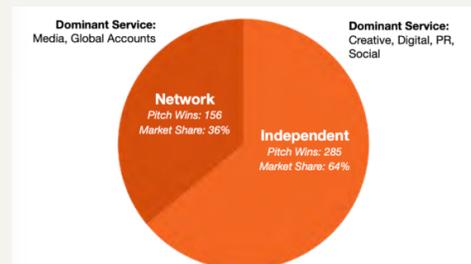


Data unveiled in pitch consultancy TrinityP3's New Business Report has shown an unprecedented rise in social-only pitches as networks struggle against the new business momentum of independent agencies.

Billed as "the most comprehensive snapshot yet" of Australia's new-business market for marketers and agencies, the report found a surge in independent agency pitch wins in a 24-month period – indies won 285 pitches to network agencies' 156 – a dramatic difference, TrinityP3 CEO Darren Woolley said, when you consider "most of the network wins are in media".

"Almost 60% of all media pitches are being won by networks, but all in the other categories – they're in a minority," he told LBB.

"The move we're seeing in the big network agencies to offer clients a platform, a one-stop shop, a plug and play around data and technology, has meant there's a big space in the market for the indies to offer specialist skills and disciplines that fit into the gaps the other solutions leave."



The consultancy also observed a marked rise in social-only pitches, signalling growing demand for specialist expertise on the creator economy. More than a dozen social-only pitches were run in the past

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"Amid the continued rise of the creator economy, and platforms such as TikTok, Instagram and Snap, marketers are increasingly looking for deep domain expertise and partners that can execute at speed, capabilities many traditional agency models are not yet geared for," the report's co-author, Kylie Ridler-Dutton, said.

Darren added, "There are clients out there, apart from media and creative, who are looking for specialist agencies.

"This goes some of the way to understanding the rise of the indies, because they can be specialists. You can have an agency that's quite successful just doing one thing or one discipline really, really well."

Kylie confirmed the agency landscape is beginning to look like a "barbell" with "holding companies on one side, independents on the other".

"If your agency sits somewhere in the middle, it's increasingly the one being squeezed," Kylie said.

Darren is under "no illusions" the report is a complete list of all pitches in market. He hopes next year, as more agencies contribute, the report's insights will become "more granular".

"I'll be interested to see how [the Omnicom-IPG merger.] plays out in 2026, what that actually does to the marketplace and whether that consolidates the opportunities for indies, or we see the holding companies coming back with a vengeance."

The report analyses data from more than 400 pitches and identifies the most active client sectors, with food manufacturing leading the market, followed by tourism and travel, then banking, healthcare, and technology.

The report also ranks the top 10 agency pitch winners across media, creative, and non-media categories. Atomic 212 had the most new-business wins overall with 31 and led the media agency category, while HERO topped the creative agency rankings with 12 wins, and Apparent emerged as the leading non-media agency with 18.

Darren explained, "We have been doing our State of the Pitch research for a number of years, but there were always two questions we could not answer with precise certainty. How many pitches or tenders were there in the past year? And who exactly is winning and why? The TrinityP3 New Business report seeks to answer that in a way which goes well beyond what others do.

"When we did the first State of the Pitch, we asked, 'From a sample of 77 pitches that people gave [us] feedback on, how does that compare to all the pitches that [are] happening in market?'"

The answer, TrinityP3 determined, was about one quarter.

"When I went looking for actual hard data ... [it was] mostly media pitches.

"We know that there's lots and lots of pitching activity – it's just hard to quantify. In 2024, we began compiling the numbers.

"We noticed when we started using AI to scrape the internet that there's actually a lot of other pitching going on, just not getting reported as widely as creative and media pitches."



The full TrinityP3 2025 New Business Report, including detailed breakdowns across more than 440 individual pitches, can be purchased on TrinityP3's website. The consultancy also invites agencies to log their 2026 new business wins on the TrinityP3 website.

Top 10 Agencies by Tenders Won (Alphabetical)

- Atomic212
- Apparent
- Brainlabs
- Emotive

- Havas
- Hatched
- HERO
- Initiative
- Nunn Media
- Today.The.Brave

Top 10 Media Agencies by Tenders Won (Alphabetical)

- Atomic212
- Brainlabs
- Havas
- Hatched
- Initiative
- Mediahub
- Mindshare
- Nunn Media
- PHD
- UM

Top 10 Creative Agencies by Tenders Won (Alphabetical)

- 72andSunny
- Apparent
- BME
- Born
- DDB
- Droga5
- Emotive
- HERO
- Special
- TodayThe Brave

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