

News | 4 Feb 2026 - 3 min read



Mid-sized agencies squeezed as barbell effect influences agency landscape: TrinityP3's 2025 New Business Report

By Staff Writer

Top 5 Most Active Sectors

39 Pitches Food Product Manufacturing
(e.g., Mars, McCain, Simplot)

38 Pitches Tourism Travel & Accommodation
(e.g., Princess Cruises, Tourism Tasmania)

33 Pitches Banking Financial and Insurance Service
(e.g., Westpac, Suncorp)

26 Pitches Health Care Products, Beauty Pharmaceuticals
(e.g., Coty, Revlon)

21 Pitches Technology
(e.g., Google, Amazon)



Australia's agency market dynamics have seen a new duality emerge between holding companies that are increasingly winning media business off the back of scale-driven dominance, and indy agencies scoping up the volume, according to Trinity P3. And it's created a clear 'barbell effect' squeezing out...

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By Leigh Lavery - General Manager, The Growth Distillery | Partner Content



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The \$42 billion opportunity: Passions have firmly become the consumer's primary source of identity as the world throws a multitude of uncontrollable crises at their feet.

Trinity P3's inaugural New Business Report released today has found holdcos securing over 20% of all media tenders thanks to their scale-driven dominance. Yet against this, independent agencies have captured a majority share of market volume in specific client categories, based on the number of tenders awarded.

The report describes this notable structural transformation in the market over the past two years, marked by what is described as a 'barbell effect.' Across the pie, the network - dominated by media and global accounts - scored 156 pitch wins representing mark share of 36%. Independents, with dominant services in creative, digital, PR and social, scored 285 pitch wins and gained 64% market share.

The New Business Report replaces and augments its multi-year State of the Pitch research and provide a more detailed overview of the evolving business landscape within the Australian agency sector.

Among the contents is a list of top 10 agency winners. Atomic 212 was the leader overall and in the media agency category, while Hero has been identified as the top creative agency, and Apparent leads in the non-media agency category.

Kylie Ridler-Dutton, Senior Global Consultant at TrinityP3, commented on the evolving agency landscape.

"The agency landscape is turning into something of a barbell," she said. "Holding companies on one side, independents on the other, often led by founders who've come out of those same holding groups. If your agency sits somewhere in the middle it's increasingly the one being squeezed."

Another significant trend highlighted by Trinity P3 the report is the rise in social-only pitches. More than a dozen such pitches have been conducted by brands in the past year, indicating a growing demand for social and creator-led expertise. This trend aligns with the broader industry movement towards social media and short-form video content.

"We are in the middle of a short-form video revolution," Ridler-Dutton said in reflection of changing content consumption. "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 Trinity P3 report draws on data from over 400 pitches and identifies the most active client sectors as food manufacturing, tourism and travel, banking, healthcare, and technology. The top five most active sectors for pitching were food product manufacturing (39 pitches), tourism, travel and accommodation (38 pitches), banking, financial and insurance services (38 pitches), healthcare products, beauty and pharmaceuticals (26 pitches) and technology (21 pitches).

The full report, which includes detailed breakdowns of over 440 individual pitches, is available on the TrinityP3 website.

Darren Woolley, CEO of TrinityP3, emphasised the importance of new business in the advertising sector, stating, "We all know new business is in the lifeblood of advertising agencies."

"This report is a must-read for anyone working in new business, whether you're inside an agency or a marketer looking for a clear, end-to-end view of the capability shifts reshaping the Australian agency market as we head into 2026."

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