COST OF PITCHING

2025

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eaca

EUROPEAN ASSOCIATION OF COMMUNICATIONS AGENCIES

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EUROPEAN ASSOCIATION OF COMMUNICATIONS AGENCIES

A WORD FROM EACA'S CEO

"The decision to select an appropriately sized and skilled agency partner is crucial for marketing leaders, demanding significant time and investment. This choice carries substantial potential value, emphasizing the need for sustainable business practices that connect people, planet, and profit. Social sustainability is vital, ensuring the health and wellbeing of all stakeholders.

To maintain a viable advertising industry in Europe, it is essential for networks to value local market presence and for independent agencies to thrive. As businesses adopt ESG initiatives, reforming inefficient selection practices is necessary to create a safe and ethical process that accurately reflects expertise value. Traditional RFPs may suffice for standard goods but fall short for creative, media and strategic services.

EACA members have developed a number of best practice guidelines for pitching and can be accessed here. However, unpaid multi-stage pitches with onerous timelines and expectations so still occur and negatively affect agency profitability and culture.

In fact, according to data from Campaign and Mediasense, the cost price of pitching has risen by an average of 26% between 2022 and 2023, with 86% of talent finding it excessively time-and cost-exhaustive.

Furthermore, the 2024 EACA Agency Sentiment Survey reveals that the impact on agencies extends beyond financial concerns, highlighting mental health and well-being as the second biggest issue for talent in the industry. Alarmingly, nearly half of the respondents feel overwhelmed by their tasks, with pitching and tight client turnaround times significantly contributing to stress levels.

The EACA exists to foster the long-term prosperity of the industry and this European-wide survey aims to uncover the financial implications of pitching, encouraging marketers to reconsider complex pitch processes. By analysing pitching costs, we can identify trends that enhance efficiency for both agencies and marketers, ultimately fostering a healthier industry."

Charley Stoney
CEO
EACA

EXECUTIVE SUMMARY

In February 2025, the European Association of Communication Agencies (EACA) conducted a comprehensive Cost of Pitching Survey, gathering responses from **412 agency leaders** across **23 European countries**. All participants had taken part in at least one pitch in 2024.

The goal of this survey—and the subsequent report—is to uncover the real financial and human costs of speculative pitching and advocate for meaningful, industry-wide improvements.

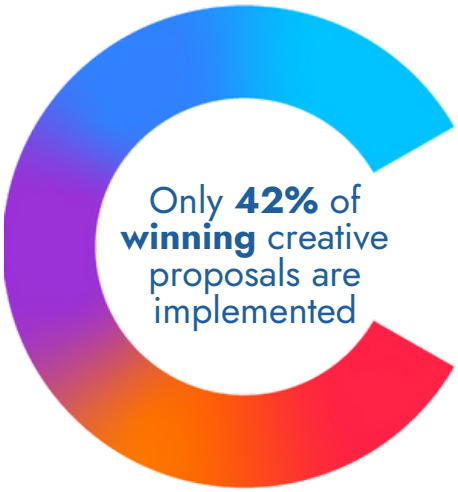
The vast majority of pitches **(88%)** were undertaken to **win new business**. On average, agencies participated in **14 new business pitches and 4 pitches as part of incumbent account reviews**. Pitch frequency varied by agency type, with event marketing and digital/social/UX/influencer agencies pitching the most, and branding and design agencies the least. The employee cost of pitching was significant. Incumbent review pitches involved an average of **five people and 44 hours**, while new business pitches involved **eight people and 48 hours.**

With competition intensifying, agencies are investing heavily to stand out—often at great cost. The average cost of pitching was calculated as **€28,355** for the average **incumbent review pitch** and **€43,804** for the average **new business pitch**. Media agencies bear the highest people costs, often **exceeding €65,000 per pitch**, driven by demands in data, digital, and multi-channel strategy. These figures include employee time, freelancer fees, out-of-pocket expenses, and the value of creative or strategic assets. On an annual basis, **the average agency spent approximately €650,937 on pitching**—an extraordinary figure with wide-reaching implications for agency sustainability.

EXECUTIVE SUMMARY

The most costly component was ideas, strategy, and creative assets, accounting for **€11,686 per incumbent account review pitch and €17,843 per new business pitch**. These figures highlight the urgent need for clearer intellectual property (IP) agreements, ensuring agencies are fairly treated and their work protected. Indeed, many pitches require **creative proposals that are never used**, resulting in wasted time and resources. For instance, while 68% of winning pitches included creative proposals, **only 42% of those proposals were actually implemented**. In practice, this means that **hundreds of hours of creative work** per new business pitch are effectively wasted.

Agencies identified five key elements that contribute to a **successful pitch experience**: a clear brief, transparency throughout, involvement of decision-makers, realistic deadlines, and reasonable pitching timelines. Unfortunately, these are not always present. A related survey by **Pitch** (US and UK) revealed that **45% of pitch teams lack clear or dedicated resources**, negatively impacting agency culture and staff mental health.

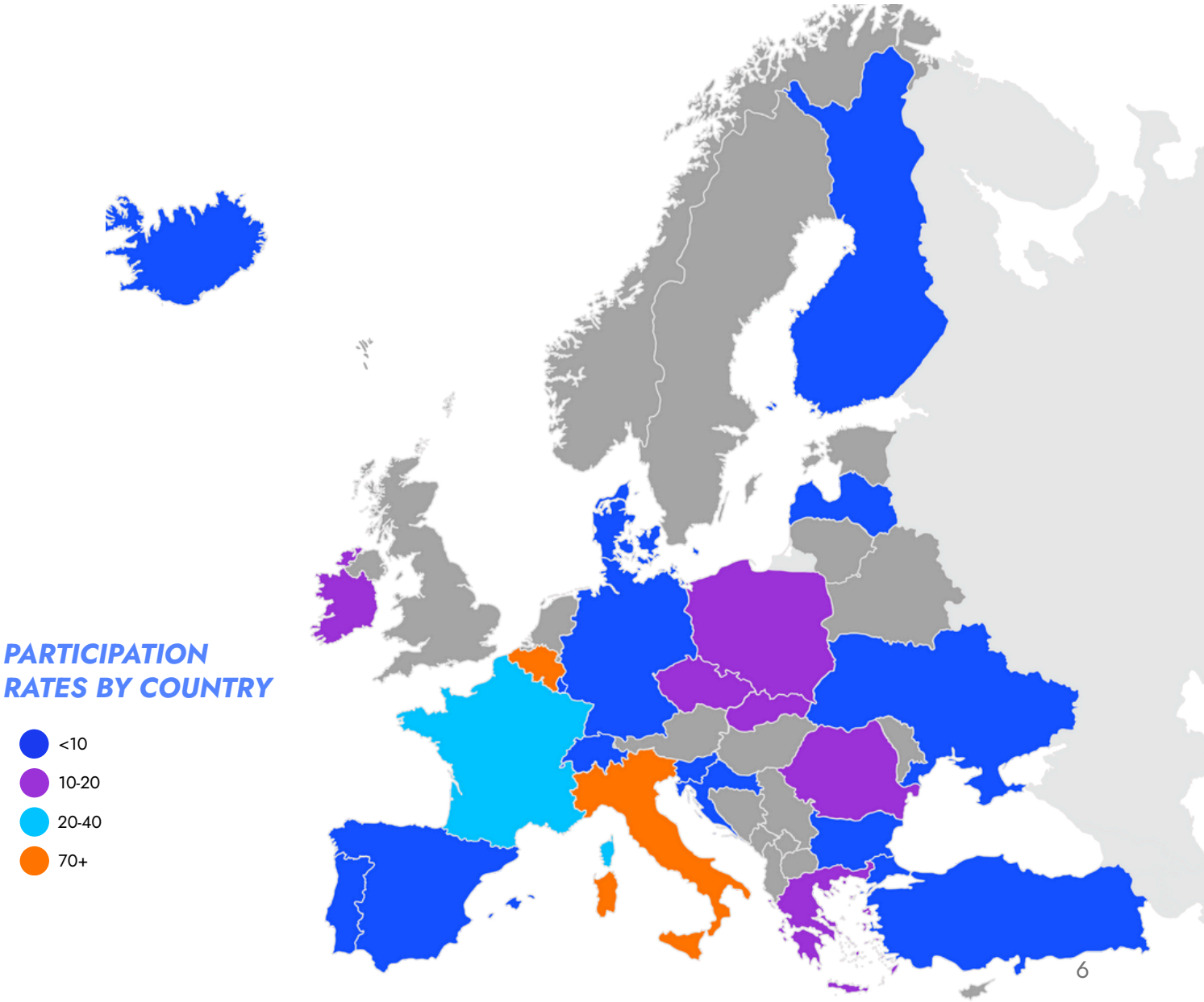


These findings offer clients concrete, actionable steps to improve their pitch processes—starting with **better communication, transparency, and structured feedback**. Ultimately, this data, along with insights from national pitching surveys, is essential to supporting the long-term health of the advertising and communications industry.

RESPONDENTS

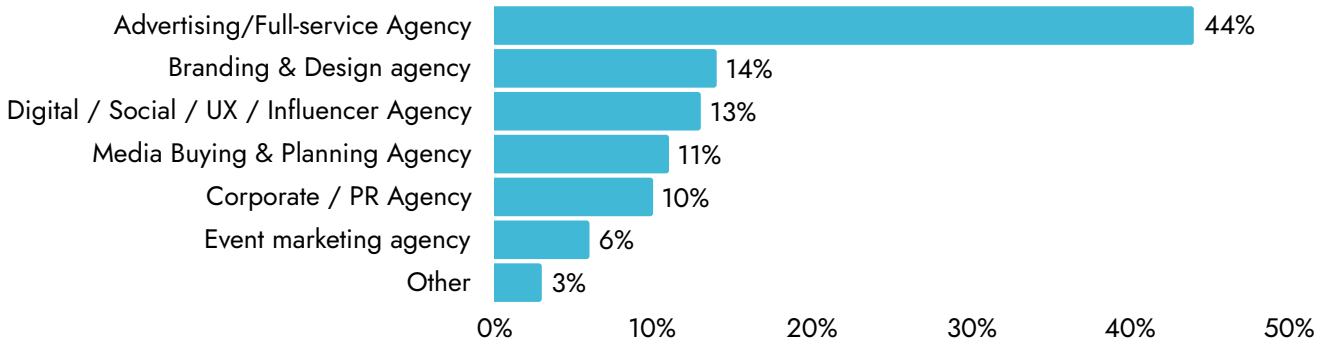
NATIONALITIES

In total, **412 respondents** answered the EACA Cost of Pitching Survey promoted by the National Associations across Europe in collaboration with the EACA in 2024 & 2025. Four National Associations carried out their own versions of the Cost of Pitching Survey, UNA (Italy), ACC (Belgium), AACC (France) and UMA (Belgium). The results of these individual surveys are integrated in the current report as and when possible and are called out as such.



RESPONDENTS

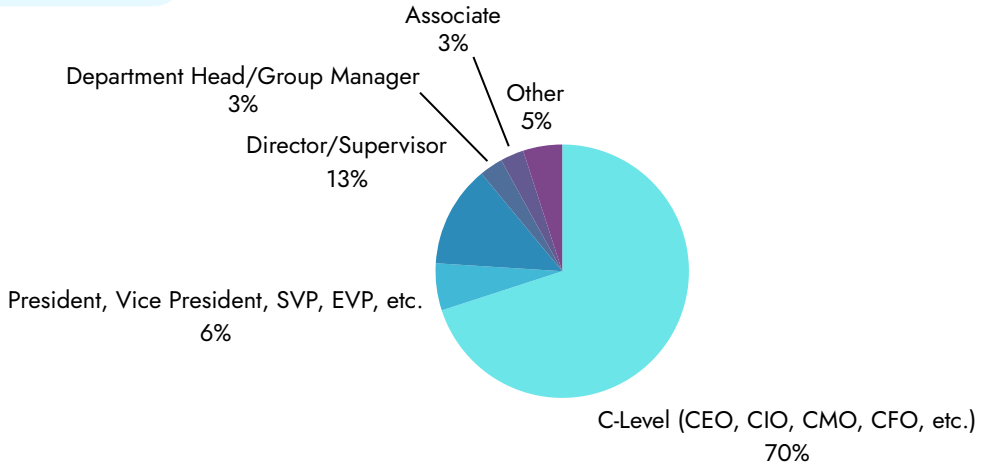
TYPE OF AGENCY



When including respondents to both the EACA Cost of Pitching Survey and those ran individually by National Associations across Europe*, we see a broad representation across agency types. Advertising/full-service agencies made up the largest group within the sample, representing almost half (44%) of all respondents. Event marketing agencies were the least well represented, making up 6% of the sample.

**Note: responses from individual National Association surveys were re-categorised in some instances into the agency types displayed above.*

JOB TITLE



PITCH EXPERIENCE

POSITIVE PITCH EXPERIENCE

In an open-ended question, respondents were asked which key elements contribute to a successful pitch experience. The most common theme related to **the brief**, with 39% of responses referencing briefs. These highlighted factors such as:

- "Clarity of brief including budget proper two way conversation during the pitch"
- "Strong clear brief with a clear budget and the ability to ask questions throughout the process"
- "Comprehensive brief".

Transparency was another frequently mentioned success factor, mostly in relation to the pitching process, selection criteria and objectives. This was referred to in 22% of answers, through quotes such as:

- "Client transparency on process"
- "Transparency of criteria
- "Transparency on budget & scope: full clarity on budget, media investment levels, and scope to allow agencies to craft realistic and effective proposals."

Having **realistic deadlines** and **sufficient time to prepare the pitch** was another common factor in responses, for example:

- "Enough time for pitch preparation"
- "Transparent Timeline – A clear schedule helps us allocate resources effectively and ensures that we can deliver our best work without unnecessary time pressure"
- "Realistic timelines: sufficient preparation time to enable agencies to develop high-quality strategic recommendations."

Other key success factors included: chemistry with clients, number of pitch participants, clarity around pitch decisions and decision-makers, remuneration for pitch participation, realistic scope of work, creative input, feedback throughout the process, and collaboration with the client.

PITCH EXPERIENCE

NEGATIVE PITCH EXPERIENCE

Most factors contributing to a negative pitch experience are the counterparts to those perceived success factors.

The table below explores some of the common themes impacting negative pitch experiences, with quotes to further illustrate. The frequency refers to the number of responses which contain reference to the pitch process element.

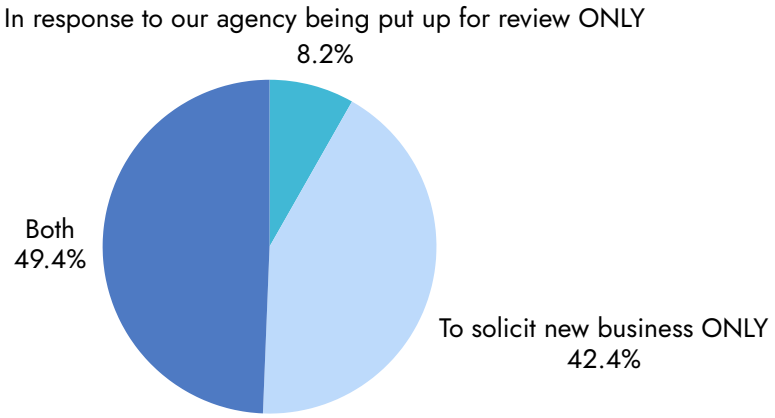
Other factors contributing to a negative pitch experience include a lack of compensation for ideas, insufficient transparency, unrealistic or misaligned expectations, poor client behaviour, and unstructured or inefficient pitch processes.

Factor	Quote	Frequency (%)
Poor brief	"Unclear brief: what the client is buying, what they need, what the budget is"	41%
Urgent deadlines/ tight timelines	"Last-minute deadlines and rushed process: tight timelines placing unnecessary stress and pressure on teams, preventing them from delivering their best work"	27%
Excessive competition	"Too many and different service profile pool of invited agencies"	15%
Lack of feedback	"No feedback after the pitch, preventing improvement and learning"	11%

PITCH INVOLVEMENT

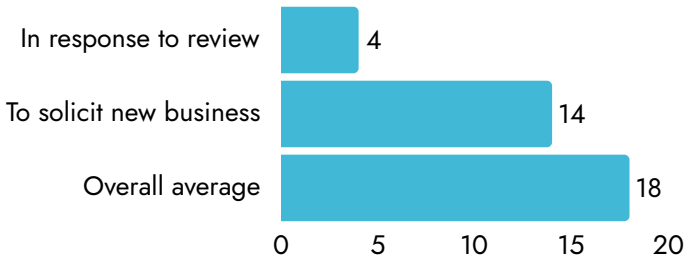
2024 PITCH INVOLVEMENT

Only those who had been involved in some form of pitching process in 2024 were able to respond to the EACA's survey. Of these respondents, the majority (49%) were involved in pitching processes both to solicit new business and in response to their agency being put up for review. 43% of agencies reported only taking part in pitches aimed at winning new business and only 8% were involved solely in incumbent review pitches.



NUMBER OF PITCHES

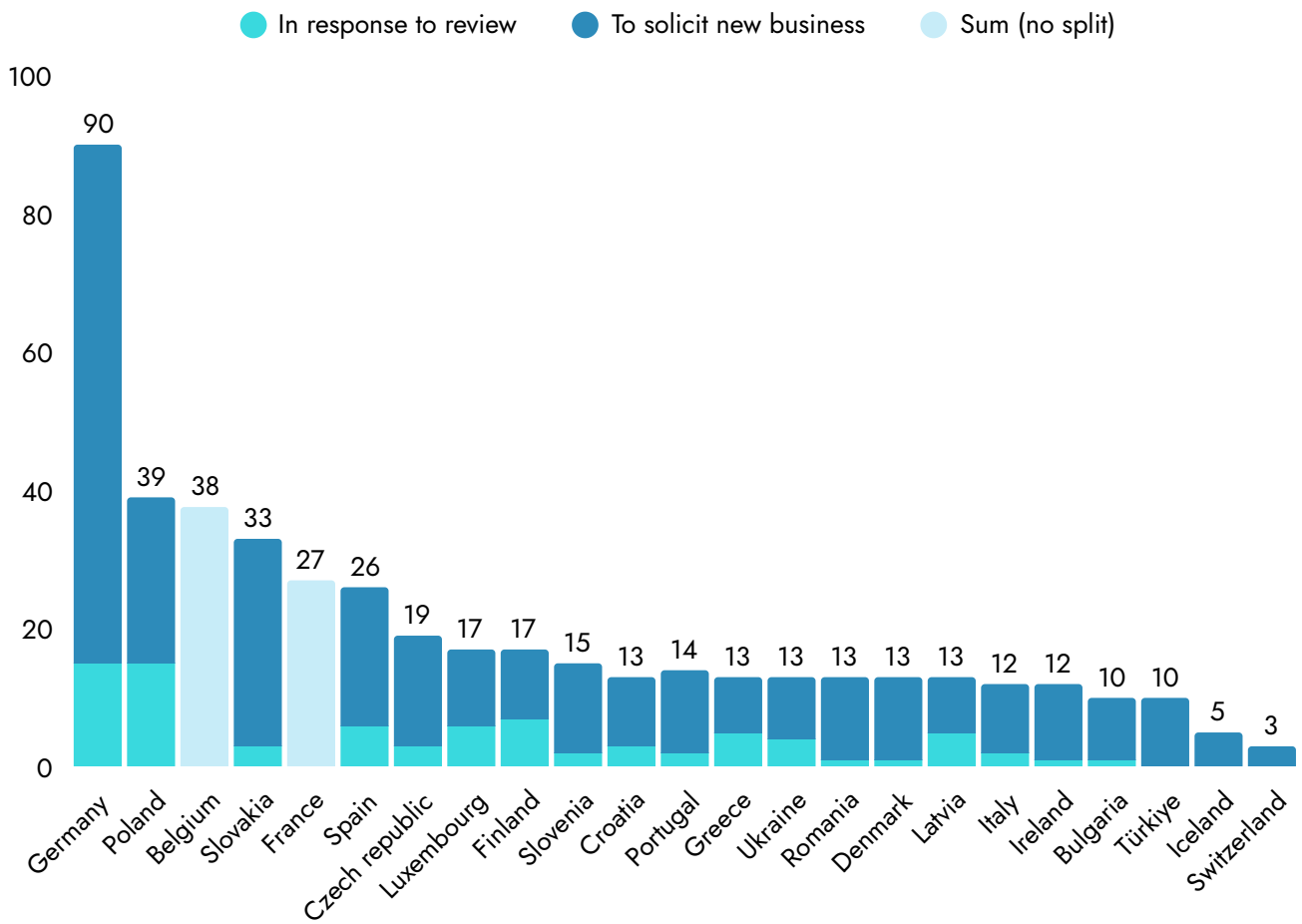
The total number of pitches carried about by EACA and national survey respondents in was **7,433**. This means that **on average, each agency undertook 18 pitches**. Respondents to the EACA survey broke down their pitch participations into those aimed at soliciting new business and those for incumbent reviews. Of the 2,895 pitches EACA survey respondents took part in, 2,267 were to solicit new business and 628 were in response to a review.



PITCH INVOLVEMENT

AVERAGE PITCH INVOLVEMENT PER COUNTRY

The average number of pitches agencies participated in varied by country and agency type. Of the countries with more than one respondent, agencies from Poland, Belgium, and Slovakia participated in the greatest number of pitches and those from Iceland, Bulgaria, and Ireland the least.



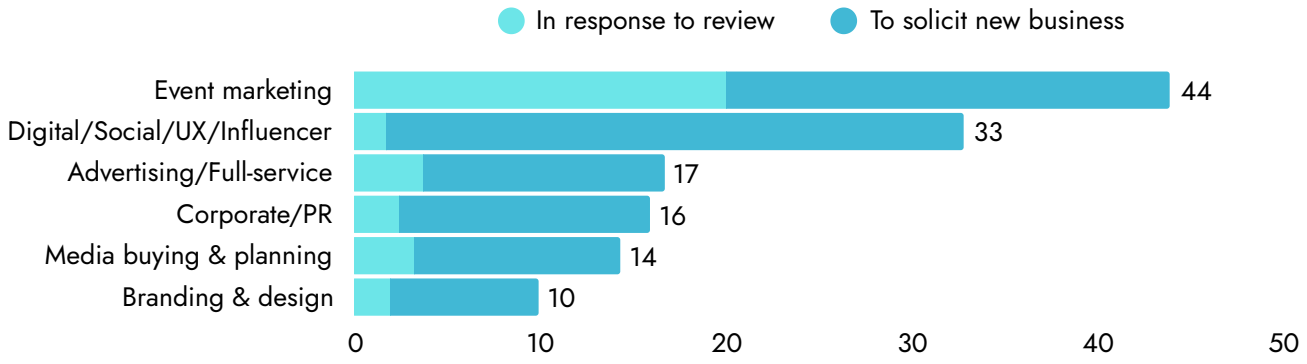
PITCH INVOLVEMENT

AVERAGE PITCH INVOLVEMENT PER AGENCY TYPE

There was a significant difference in the number of pitches agencies participated in based on their type of business. **Digital, social, UX and influencer agencies** participated in considerably more pitches to solicit new business relative to other agency types, with an average of 31 of these pitches compared to the overall average of 14.

Event marketing agencies took part in the greatest number of pitches in response to being up for review (20 on average) and completed the second highest number oft new business pitches (24 on average).

Branding and design agencies participated in the least number of pitches, with an average of 2 pitches in response to review and 8 new business pitches (compared to overall averages of 4 and 14 respectively).



PITCH INVESTMENT

PEOPLE INVOLVED

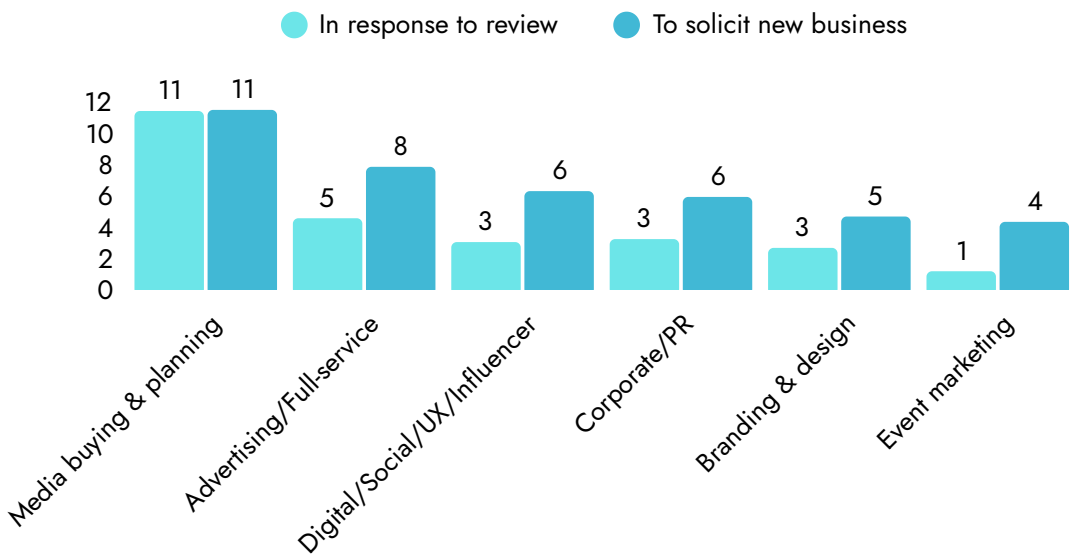
On average, **5 people** were involved **in each pitch as a response to an incumbent review** and **8 in each pitch to solicit new business**. That is a considerable amount of resources. Based on the number of total pitches agencies reported participating in, we can assume that around 48,503 people belonging to EACA and national survey agency respondents were involved in pitches in 2024*.

Media buying and planning agencies required **the greatest number of people** to be involved for each pitch, averaging 11 people for each pitch type. While media agencies are necessarily using up creative resource in pitching, media pitching in general is **extremely demanding, requiring a huge number of specialists**. This reflects the complexity of the media landscape and the deep understanding of that landscape that media agencies need to have today.

Event marketing agencies, on the other hand, required the fewest. This could be linked to the greater volume of pitches undertaken by event marketing agencies, necessitating stricter people resource management.

**This does not account for individual employees' involvement in multiple pitches.*

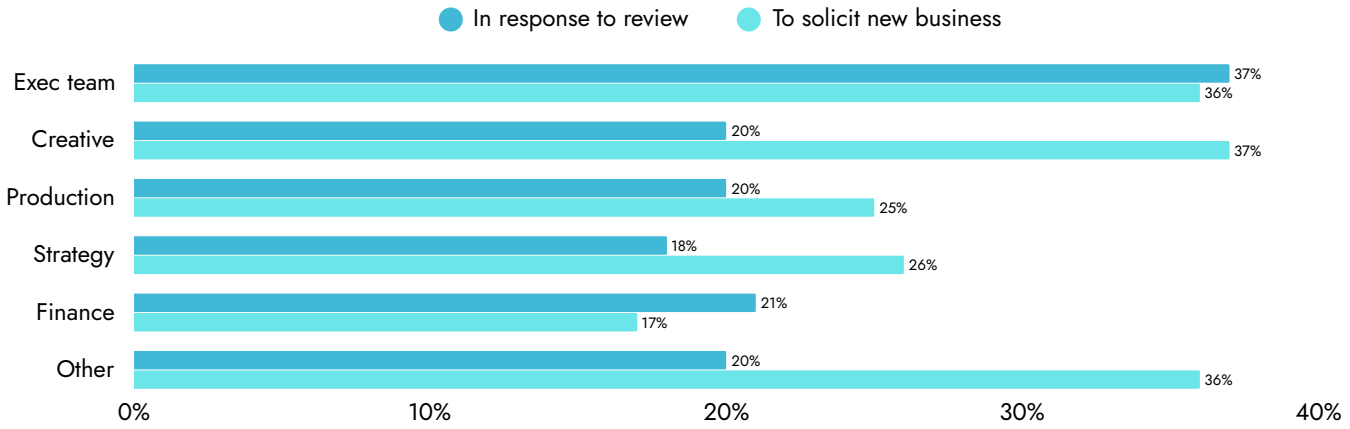
AVERAGE NUMBER OF PEOPLE INVOLVED IN EACH PITCH



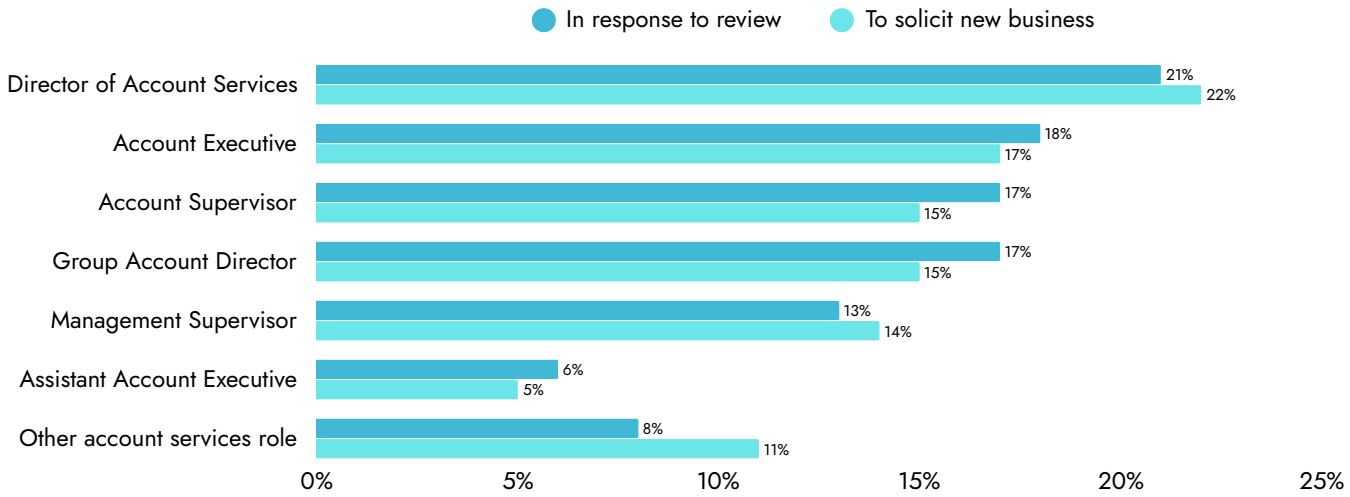
PEOPLE INVESTMENT

DEPARTMENTS & JOBS

Executive teams were most frequently involved in pitching, both for incumbent review and new business pitches. When elaborating on responses citing 'other', participants highlighted the role of creative and strategic departments, as well as trading and other specialist functions.



When it comes to the specific roles that are involved in the pitching process, Directors of Account Services are most frequently involved, whereas Assistant Account Executives are least likely to play a role.

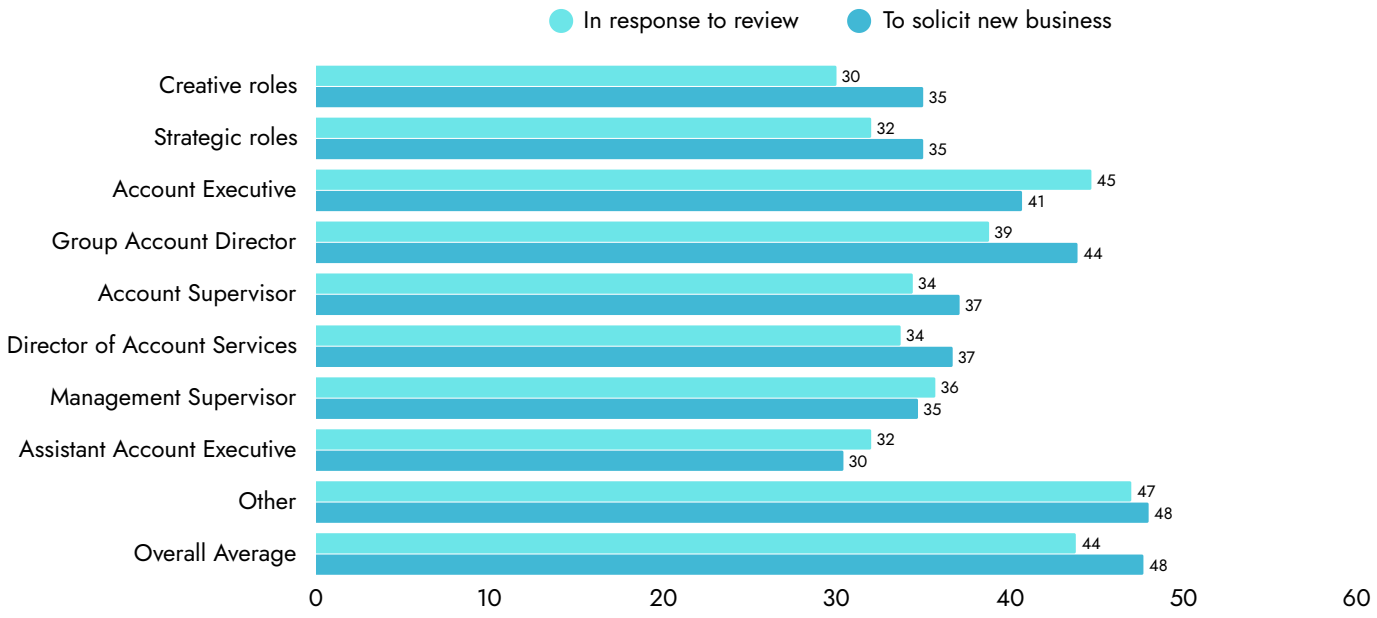


PEOPLE INVESTMENT

HOURS SPENT

The average number of hours per person spent on pitches related to an incumbent review was 44 and for those working on a new business pitch it was 48 hours.

This changes considerably depending on the role of those involved in the pitch, as shown in the graph below.



When viewing the hours spent by those in 'Other' job roles, it is important to note that this represents an aggregated group of roles for many respondents (e.g. the hours spent by employees in multiple different roles not listed as options are all counted under the 'Other' response).

Those in more junior roles (i.e. Assistant Account Executives and Account Executives) spend more time on pitches related to incumbent account reviews, likely because they are familiar with the account and/or there are more resources to draw upon from. New business pitches typically require a greater investment from those in more senior roles (i.e. Directors) as there is less familiarity and no pre-existing relationship.

PEOPLE INVESTMENT

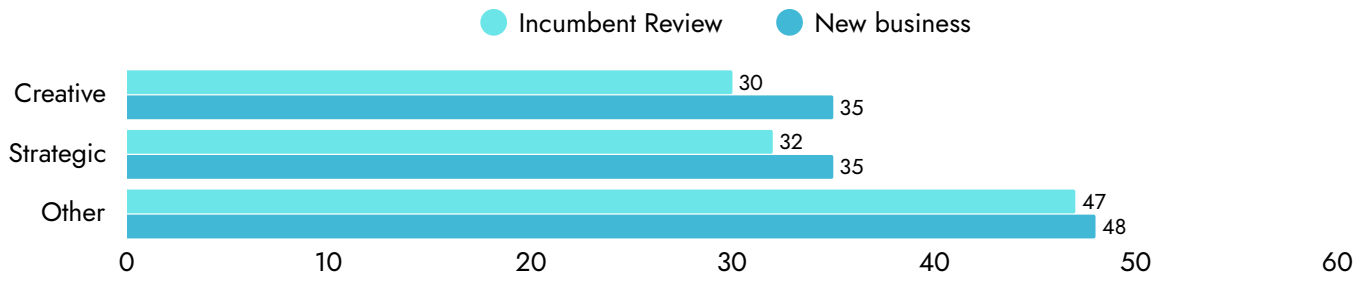
CREATIVE VS STRATEGY ROLES

AVERAGE HOURS SPENT ON PITCHING

When respondents gave an answer to the 'Other' option in the survey question *"Which which specific jobs make up those people involved in pitches?"*, they were asked to elaborate on the jobs included. By categorising responses into Creative roles, Strategic roles, and Other roles, we estimated the number of hours that each function type spends on the average pitch.

The average number of hours spent by each employee on a new business pitch did not differ strategic and creative departments. However, there were **more employees from creative departments reportedly involved** in these pitches. What this accounts for is that when it comes to new business pitches, there is a tendency for agencies to include a greater number of employees in creative roles. Considering that 68% of successful pitches were asked for creative proposals, these figures potentially point to **a wide variety of creative skills and areas of expertise required to create a successful pitch**, necessitating the involvement of more individuals from creative departments in the pitching process for new business.

Employees in strategic roles spend, on average, 2 extra hours on incumbent review pitches relative to those in creative roles.



Considering that only 42% of winning creative proposals were executed as such, hundreds of hours of creative work per new business pitch are effectively wasted.

PEOPLE INVESTMENT

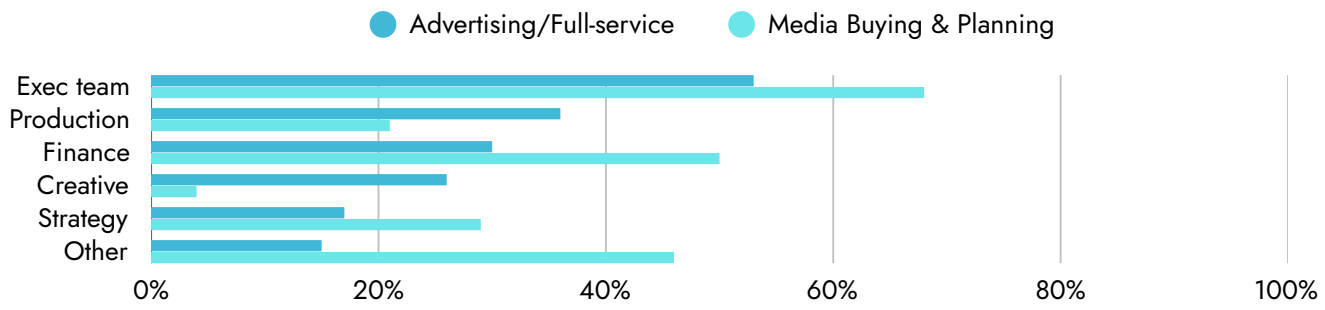
MEDIA VS ADVERTISNG

DEPARTMENTS INVOLVED

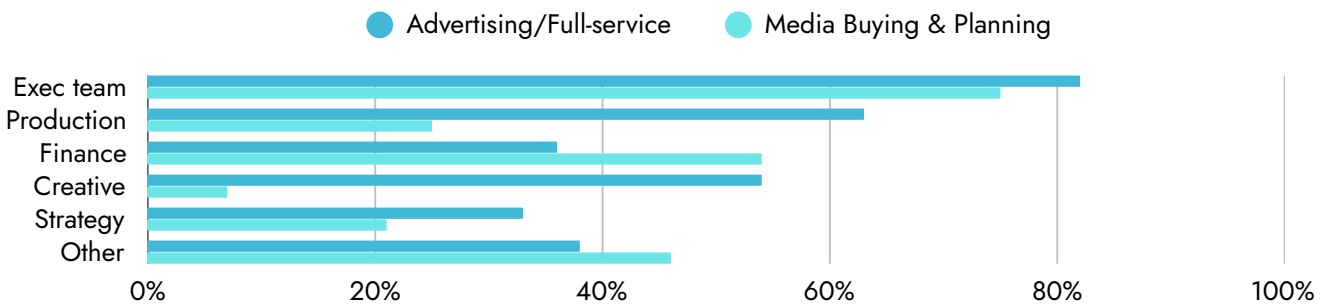
Taking a closer look at media planning and buying agencies compared to advertising/full-service agencies, there are some clear differences in people resourcing for pitches.

Regardless of pitch type, advertising agencies are more likely to include production departments than media companies. The majority from both agency types report including their Exec team in new business pitches, whereas more media agencies include their finance departments in more pitches relative to advertising agencies. Advertising agencies are significantly more likely to include creative departments in new business pitches.

DEPARTMENTS INVOLVED IN ACCOUNT REVIEW PITCHES



DEPARTMENTS INVOLVED IN NEW BUSINESS PITCHES



PEOPLE INVESTMENT

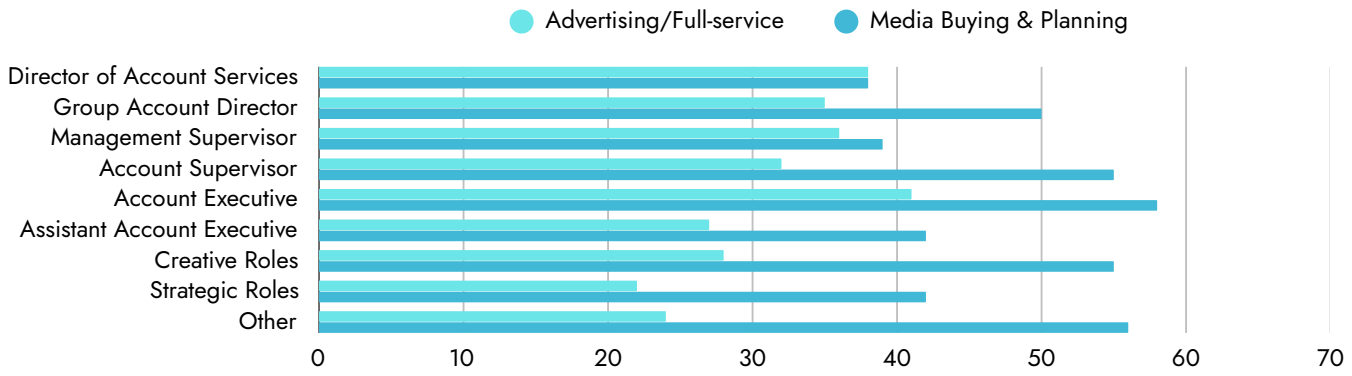
MEDIA VS ADVERTISNG

HOURS SPENT

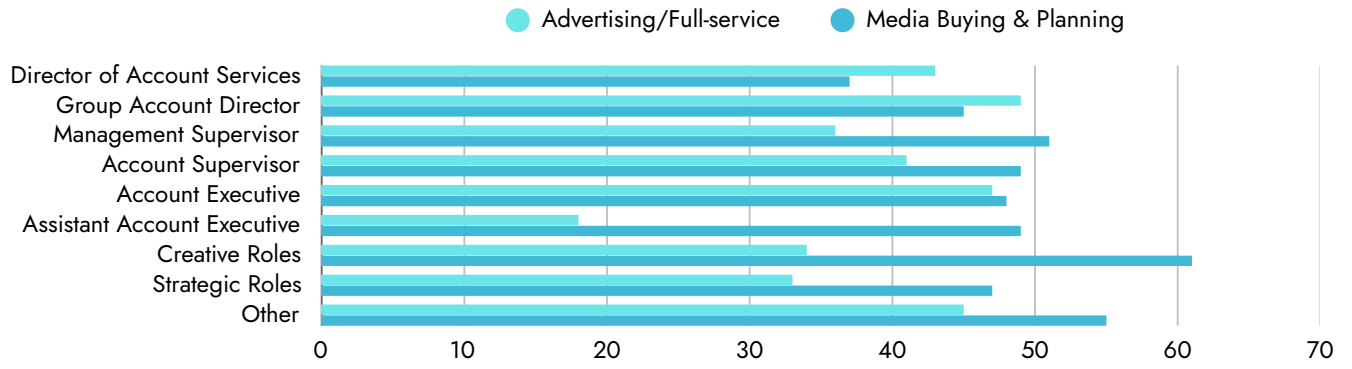
As mentioned, media agencies include considerably more individuals in pitches than advertising agencies (11 versus 6 people included in the average pitch respectively). As such, one would expect to see more hours spent on the average pitch by media agencies, however there is no huge difference here.

Where we do see a difference is in **media agencies relying more heavily on junior talent**. For example, Assistant Account Executives in media agencies spend an average of 49 hours on a new business pitch and 42 on an incumbent review pitch. This compared to those in advertising agencies who spend 18 and 27 hours respectively.

AVERAGE HOURS SPENT PER ACCOUNT REVIEW PITCH



AVERAGE HOURS SPENT PER NEW BUSINESS PITCH



PEOPLE INVESTMENT

COST OF PITCHING

Based on respondents' reported costs for individual elements of the pitching process, as explored further in the report, an average cost was calculated for new business pitches and those aimed to solicit new business:

These figures are comprised of internal and external costs and while may not be fully comprehensive, give a good indication of the financial cost of pitching to agencies:

- **Internal:** the cost of hours spent by employees on the average pitch
- **External:** the average cost of freelancers per pitch when included, out-of-pocket expenses for pitches, and the average costs associated with ideas, strategy or creative assets (in addition to any billable hours) per pitch.

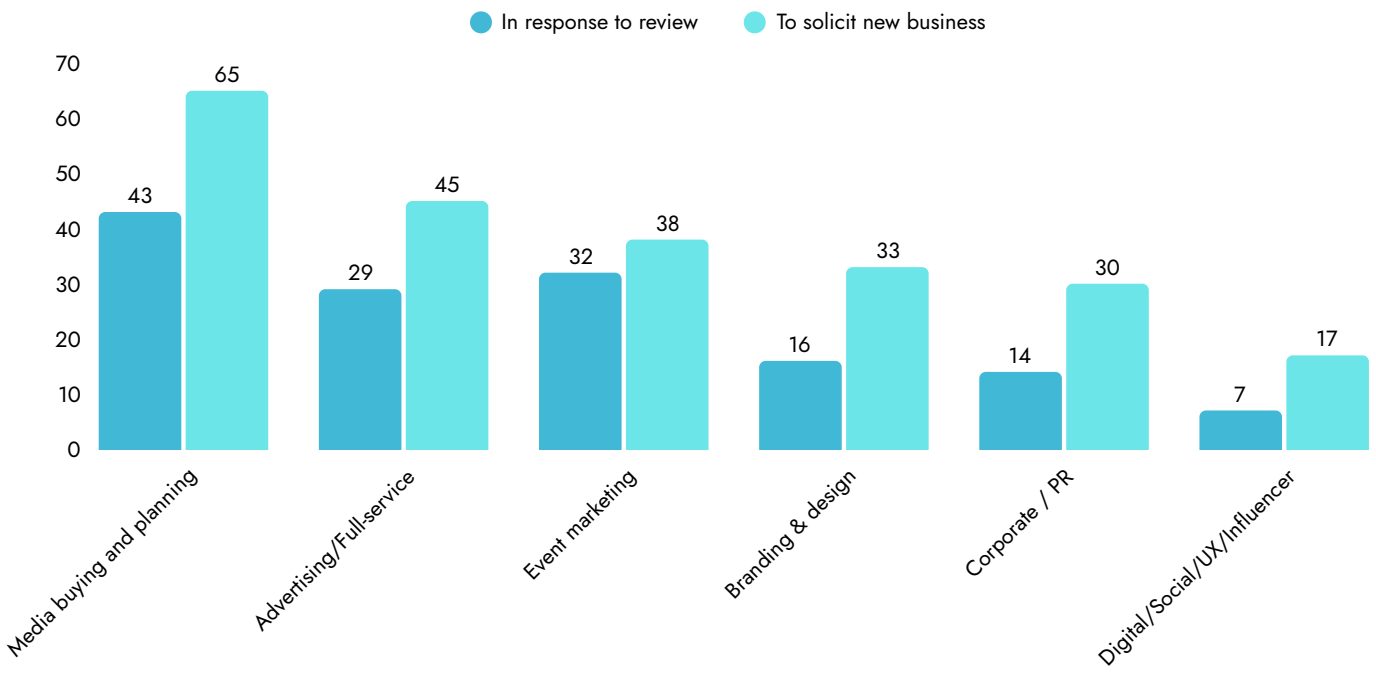
This EACA survey is the first of its kind, however the national survey conducted by the AACC showed that the **price of pitching increased by 78% between 2021 and 2023**. The financial burden of pitching is being widely reported by agencies and this data shows that it is indeed considerable.

PEOPLE INVESTMENT

BY AGENCY TYPE

Pitching appears to be most costly for media buying and planning agencies, who report an average total cost of **€42,795 per pitch** in response to an incumbent review and **€65,381** in response to a new business pitch. Digital, social, UX, and influencer agencies report the lowest cost of pitching (€7,327 for incumbent review pitches and €17,290 for new business pitches).

COST OF PITCHING BY AGENCY TYPE (THOUSANDS)

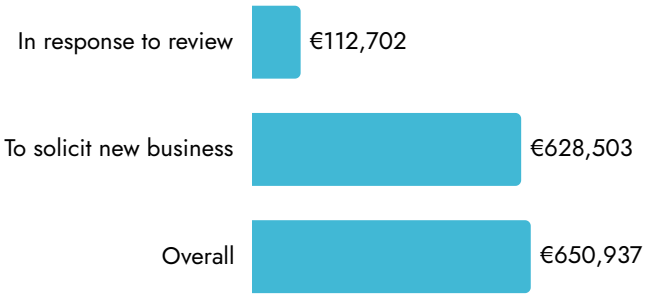


It is important to note that the current survey did not assess the average value of pitches won and it is possible that the average pitch value also varies by agency type. In this case, some of the variability in the cost of pitching could be attribute to higher value pitches requiring a greater cost investment.

COMBINED COST OF PITCHING

TOTAL SPEND ON PITCHING

On average, agencies spent a total of **€650,937 per year on pitching**. When breaking down the EACA survey responses into pitch type, agencies spent on average a total of €112,702 on pitches in response to an incumbent review and €628,503 on new business pitches*.



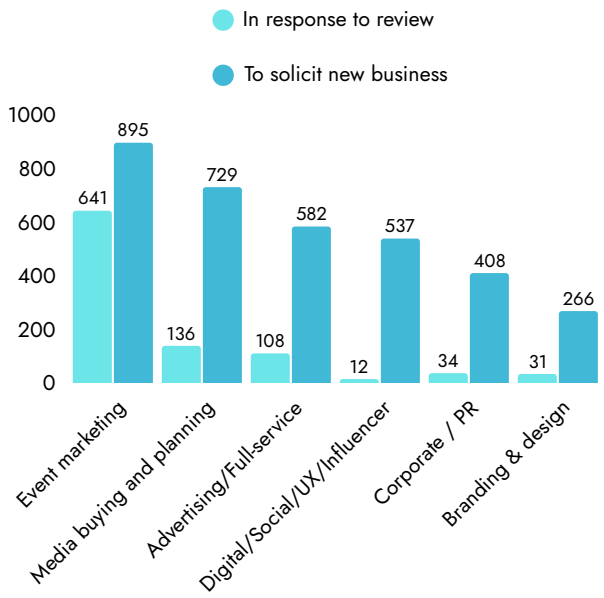
Considering the total number of pitches carried about by our survey respondents, we can see that last year the combined cost of pitching from these 142 agencies alone was over **€268 million** – a truly astonishing figure.

**Calculated based on the average cost of each pitch type multiplied by the average number of each pitch type agencies participated in.*

BY AGENCY TYPE

As they participate in the greatest number of pitches each year, **event marketing agencies spend the most annually on pitching** – with a total spend of €641,438 on incumbent review pitches and €894,988 on new business pitches. **Media agencies spend the most per average pitch**, meaning that the total annual spend for the average media agency is €136,026 for incumbent review pitches and €728,527 for new business pitches.

Branding and design agencies spend the least each year on pitching, with an average spend of €30,654 on incumbent review pitches and €265,997 on new business pitches.



TOTAL SPEND ON PITCHING BY COUNTRY

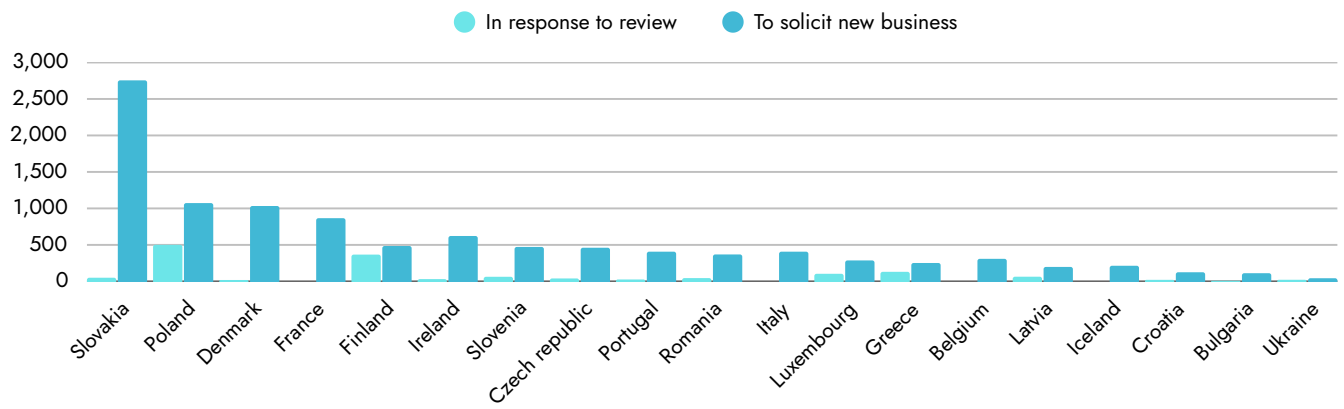
The total annual cost of pitching also varies significantly by country. We included figures for France, Italy, and Belgium based on data included in the National Associations' surveys; however, it is important to note that each surveys included varying elements in their cost of pitching calculations. The data for these countries is included, however, for representative and comparative purpose.

The average agency in Slovakia reports spending almost €3 million each year on pitching which is an astonishing figure. Polish and Danish agencies report the next highest annual pitching spend, with around €2 million and €1 million respectively.

The countries where agencies report spending the least on pitching include Ukraine (€65k annually), Bulgaria (€120k annually), and Croatia (€146k annually).

While it is worth remembering that the number of pitches each agency takes part in varies, this is a significant disparity between the highest spending and the lowest spending and requires considerable attention.

COST OF PITCHING BY COUNTRY (THOUSANDS)



**Note: Germany, Spain, Switzerland, and Türkiye are excluded from the chart above as their data was based on 1 respondent each and heavily skewed the chart*

FINANCIAL INVESTMENT

COST OF HOURS SPENT

When thinking about the total number of hours that each job title spends on an average pitch, business leaders estimated that the cost per person was **€3,732 for the average pitch related to an incumbent review** and **€4,465 for the average new business pitch**.

When considering the multiple roles involved in each pitch, this generated a figure of €7,369 in people costs for the average incumbent review pitch and €13,564 for new business pitches*.

€7,369 Cost in hours for the avg incumbent review pitch

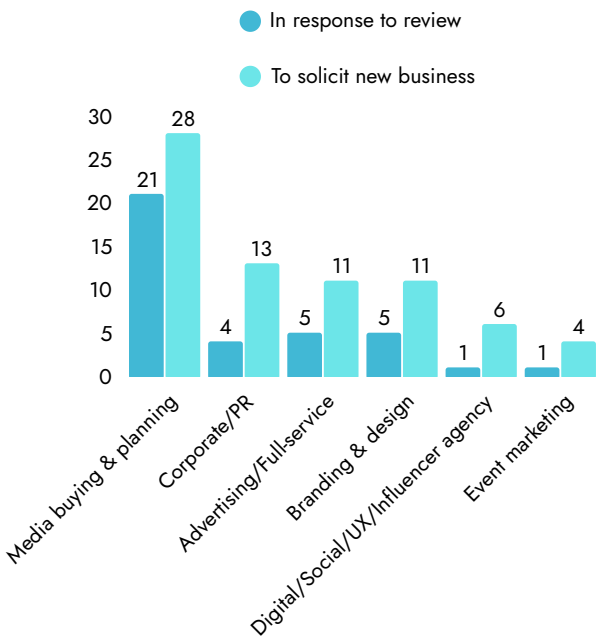
€13,564 Cost in hours for the avg new business pitch

**Note: This figure assumes only 1 person per job title was involved in each pitch. It is possible that multiple people sharing the same job title can take part in same pitch and we will include this consideration when designing future surveys.*

COST OF HOURS BY TYPE

Media buying and planning agencies had the **highest people costs** for both new business pitches (€28,382 per pitch) and incumbent review pitches (€21,274 per pitch).

Event marketing agencies have the lowest people costs both for incumbent review pitches (€1,086 per pitch) and for new business pitches (€4,243 per pitch).

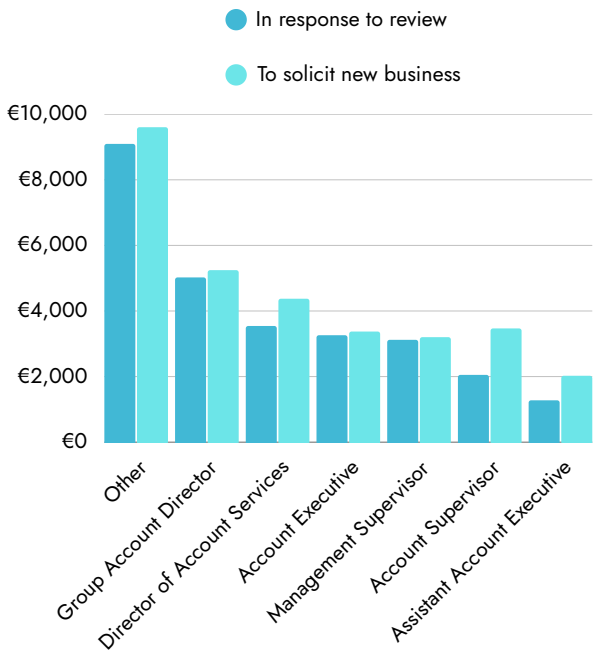


Overall, people costs account for **31% of the total costs for new business pitches** and **26% of the total costs for incumbent review pitches**.

FINANCIAL INVESTMENT

COST OF HOURS PER JOB

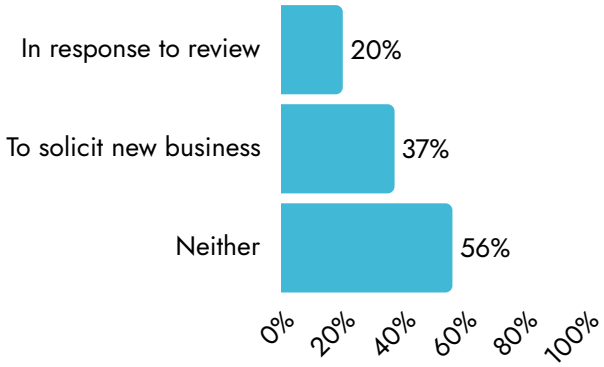
The largest cost in terms of hours comes from Group Account Directors (€5,024 for incumbent review and €5,245 for new business pitches). This group spend the most hours on new business pitches (average 44 hours per pitch) and have high-value time due to their seniority.



**Note: This figure assumes only 1 person per job title was involved in each pitch. It is possible that multiple people sharing the same job title can take part in same pitch and we will include this consideration when designing future surveys.*

STAFFING CHANGES

The majority of agencies reported **no staffing changes from pitching**. However, more than a third adjusted staff after new business pitches, and 20% after incumbent review pitches.

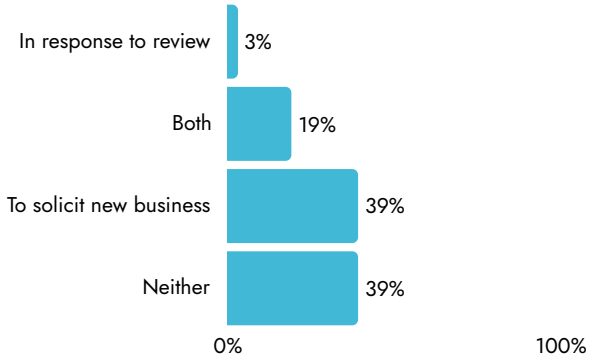


EXTERNAL RESOURCES

USE OF FREELANCERS

Over **half of all pitches that were undertaken (61%) typically used external resources and freelancers** for category expertise, strategy and creative specialism. Of these, 19% of agencies availed of these types of external resources both for new business and incumbent review pitches.

USE OF FREELANCERS



The use of external resources varies by agency type, with event marketing agencies most commonly using freelancers solely for incumbent review pitches (14%) and event marketing agencies the most likely to use them for both (29%). Media buying and planning agencies were are the least likely to use external resources (57% did not use).

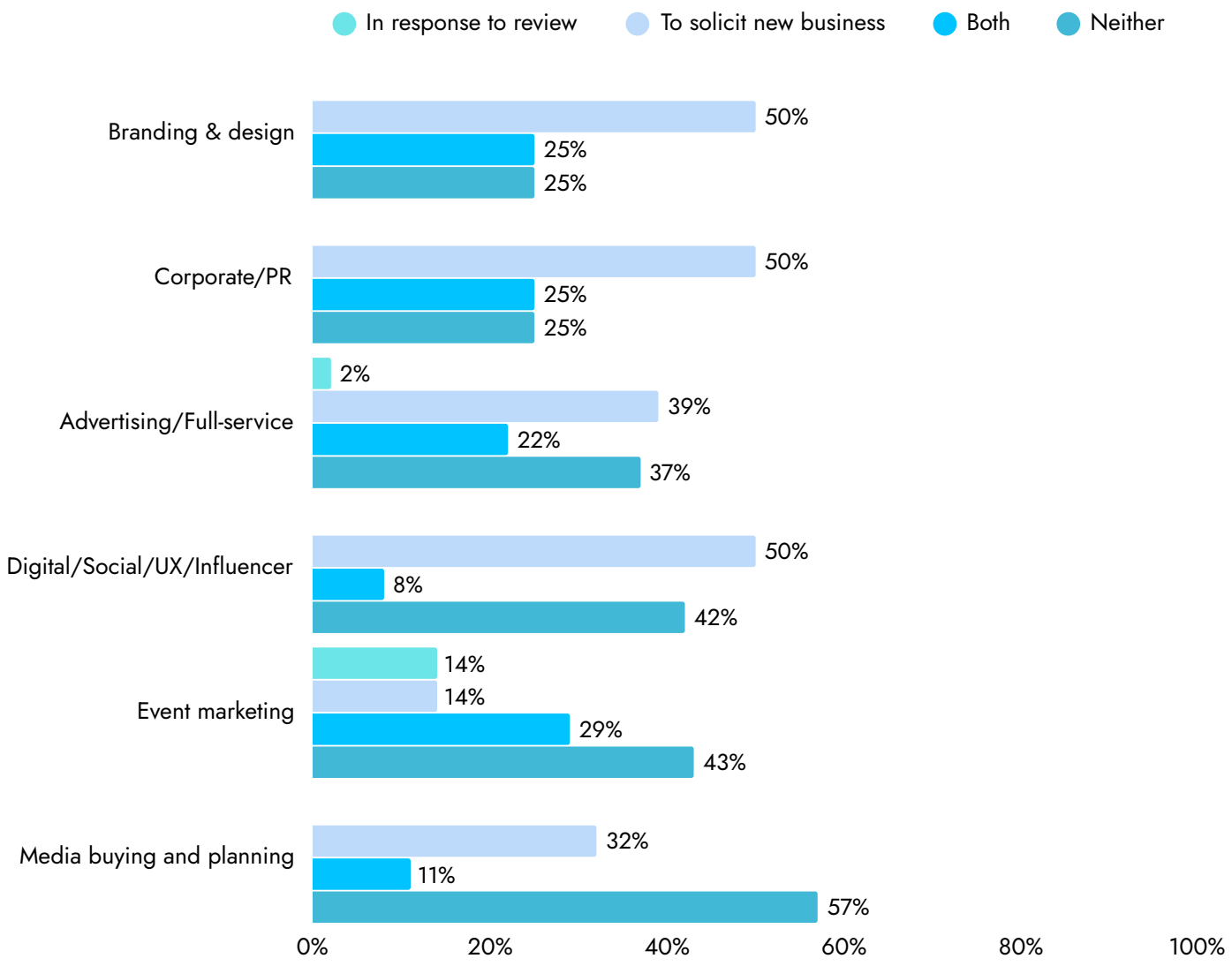
When external resources were involved in pitches related to an incumbent account review, their commercial model was most commonly either a fixed fee, some with a success fee or the use of an hourly or daily rate.

The commercial models used by external resources in the pitching process for new business included:

- **Fixed fees:** Flat fees per project, per service, or for creative work.
- **Success-based fees:** Payments tied to winning the pitch, often with a fixed plus bonus structure.
- **Hourly/daily rates:** Billing based on time worked.
- **Referral/commission-based:** Earning a percentage of the contract value or a referral fee.
- **Mixed models:** Combinations of fixed, variable, or success-based fees.

EXTERNAL RESOURCES

USE OF FREELANCERS BY AGENCY TYPE



COST OF EXTERNAL RESOURCES

COST OF EXTERNAL RESOURCES

On average the cost incurred by agencies for involving external resources in the pitching process was **€3,355**.

Interestingly, the average cost to the agency of involving external resources was more costly for pitches related to an incumbent account review relative to those aimed at soliciting new business. Although the difference is minor, this is the only area where incumbent review pitches are reported to cost agencies more than new business pitches.

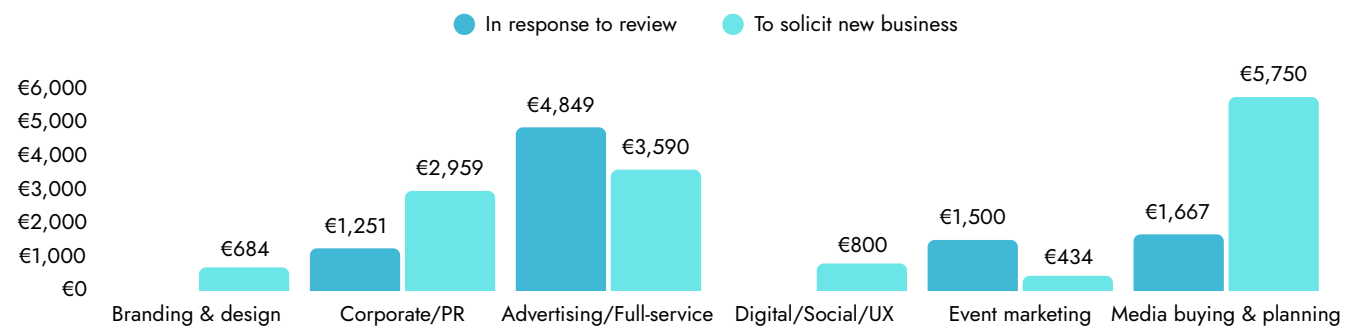
AVERAGE COST PER PITCH OF INVOLVING EXTERNAL RESOURCE

COST BY AGENCY TYPE

The average cost of involving an external resource in the pitching process was **highest for media buying and planning agencies** who were pitching for new business (average cost of €5,750 per pitch) **and advertising/full-service agencies** pitching as part of an incumbent account review (average cost of €4,849 per pitch).

There appears to be a significant difference in the amount different agency types spend on external resources, with event marketing agencies reportedly spending an average of only €434 per new business pitch. This is a difference of over €5,000 per pitch between the highest spending agency type and the lowest. Again, this could be attributed to different agency types taking part in different value pitches, however the variation in the cost of external resources is considerable.

AVERAGE COST PER PITCH OF INVOLVING EXTERNAL RESOURCE BY AGENCY TYPE

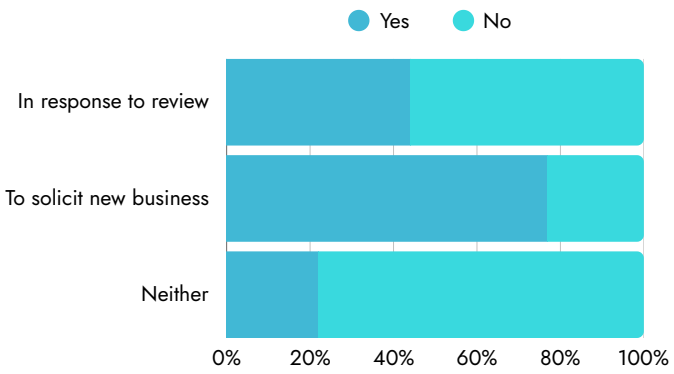


EXPENSES

INCURRENCE OF EXPENSES

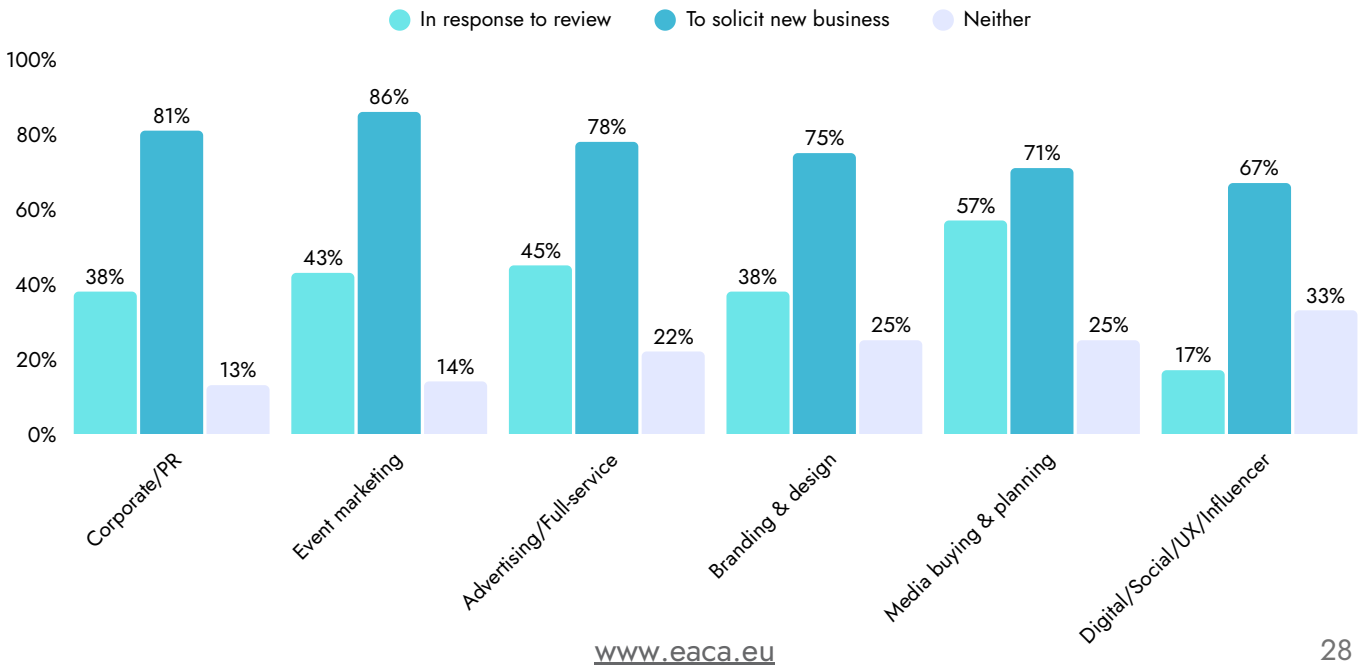
Significantly **more out-of-pocket expenses are typically incurred by agencies as a direct result of new business pitches** compared to incumbent review pitches. This increased investment is likely driven by a desire to impress new clients in an effort to develop lasting relationships and subsequent business. Only 22% of respondents report not typically incurring out-of-pocket expenses for either type of pitching, demonstrating one aspect of the financial burden pitching puts on agencies.

OUT-OF-POCKET EXPENSES



Digital, social, UX, and influencer agencies had the highest portion of respondents who typically do not incur out-of-pocket expenses for pitches (33%).

OUT-OF-POCKET EXPENSES (BY AGENCY TYPE)



ESTIMATED EXPENSES

When asked to estimate the amount of out-of-pocket expenses directly attributable to incumbent review pitches, an average figure of **€5,879** was reported. For pitches aimed at soliciting new business, this number rose to **€9,109**.

These types of expenses include **creative development costs, presentation materials, travel and accommodation, research and strategy, consultant or freelancer fees, talent costs, venue and equipment rental, digital and IT expenses**, etc. Many of these costs are non-recoverable unless the agency wins the business, making pitching a significant investment.

Although the EACA survey did not assess the average success rate from pitching, data from the other national European reports demonstrates the following success rates in 2023/2024:

- **AACC (France):** 39% of pitches were successful, representing a decline from 51% in 2021.
- **ACC (Belgium):** 60% of pitches were successful, with pitches from long-term partnerships more successful than ad-hoc project or public tender pitches.
- **UNA (Italy):** 42% of pitches were successful, with this number increasing to 53% when the pitch was for an incumbent review.

This data demonstrates that pitches are far from a guaranteed success. Considering the significant investment made by agencies when pitching, the financial implications of seldom recovering these costs has huge repercussions for agencies and the industry as a whole.

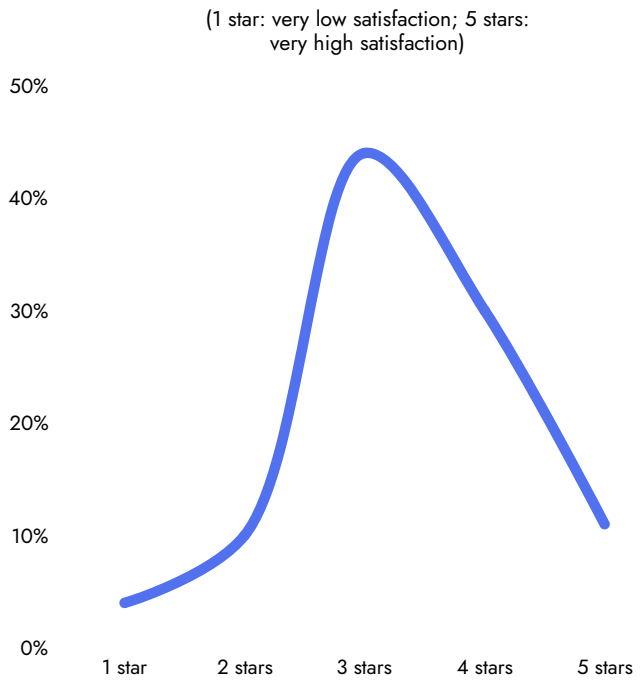
PITCH CONSULTANTS

EXPERIENCE OF INTERMEDIARIES

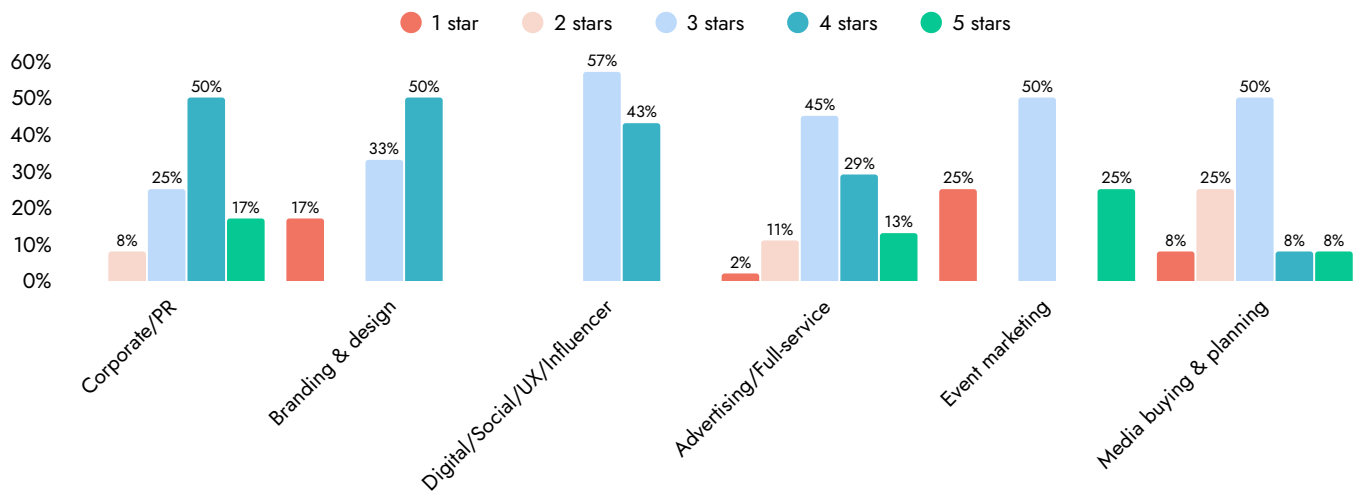
The majority of agencies had a **positive experience of pitch consultants or intermediaries**, with 42% rating their experience either 4 or 5 stars. Although we do not have further context on the factors impacting agencies' experience of external resources, the mostly positive nature of agencies' experience reflects well on the values these external resources can bring.

Event marketing and media buying/planning agencies reported the lowest levels of satisfaction when working with pitch consultants, whereas branding and design agencies and corporate/PR/influencer agencies had the highest levels of satisfaction (of those with 2+ respondents).

EXPERIENCE OF PITCH CONSULTANTS



EXPERIENCE OF PITCH CONSULTANTS (BY AGENCY TYPE)



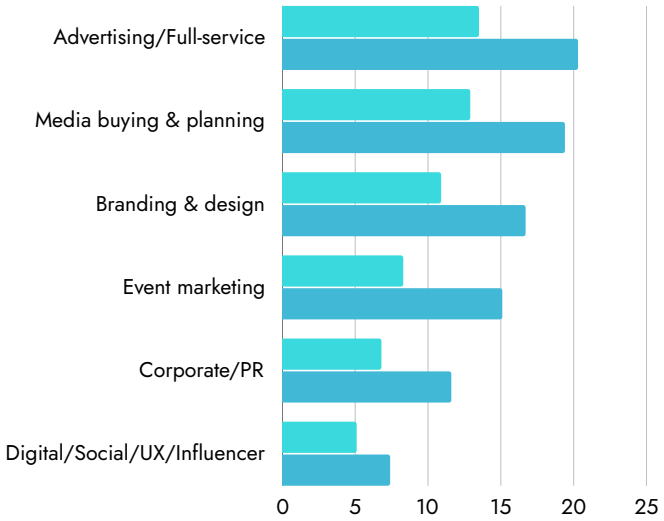
SHARING IDEAS

COST OF ASSETS

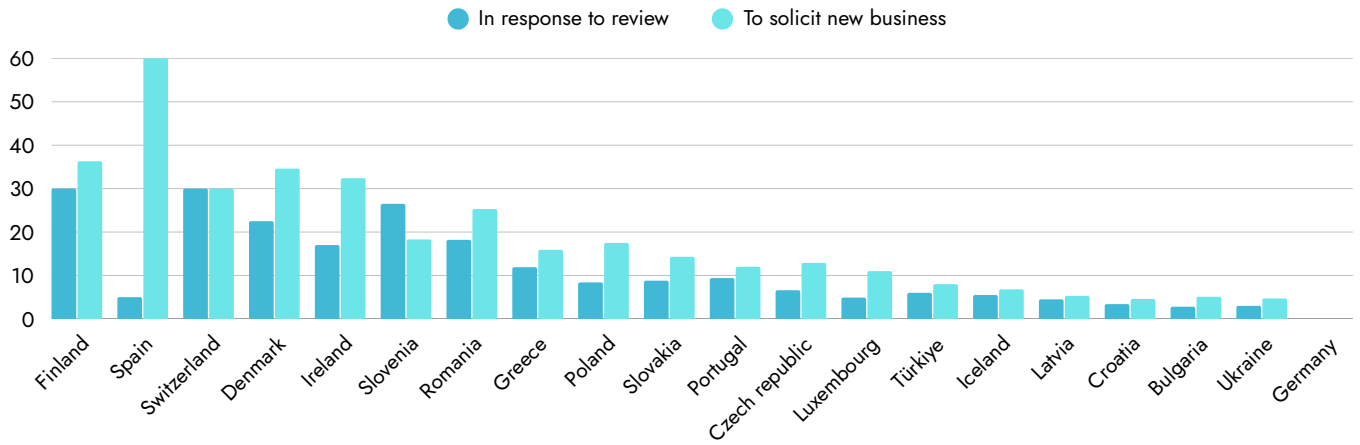
The average estimated costs associated with ideas, strategy or creative assets provided to clients as part of pitches was **€14,765**. This figure represents the cost of these assets in addition to any billable hours. It varied depending on pitch types and was €11,686 for incumbent review pitches and €17,843 for new business pitches. This again highlights the financial burden of pitching for agencies, particularly when it comes to soliciting new business.

These are not consistent across countries and industries, as demonstrated by the charts.

IDEAS, STRATEGY OR CREATIVE ASSETS COST (BY AGENCY TYPE; THOUSANDS)



IDEAS, STRATEGY OR CREATIVE ASSETS COST (BY COUNTRY; THOUSANDS)



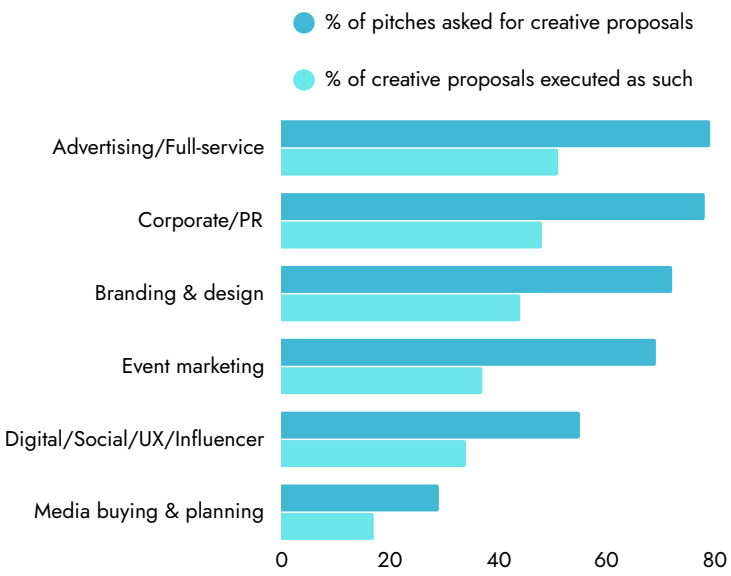
SHARING IDEAS

CREATIVE PROPOSALS

While an average of 68% of pitches won by agencies were asked for creative proposals, only **42% of those creative proposals were executed as such.**

The difference between the proportion of won pitches requiring creative proposals and those that were executed varied by agency type. Media buying and planning agencies had the most amount of requested creative proposals that were executed as such (29% requested, 17% executed), whereas event marketing agencies had the greatest difference between requests and executions of creative proposals for won pitches (69% and 37% respectively).

CREATIVE PROPOSALS FOR WON PITCHES



Advertising / full-service agencies were asked for creative proposals in 80% of the pitches they won. However, only half of the creative proposals won at pitch were actually executed by the client. This does **question the need to have creative proposals submitted for so many pitch processes**.

Similar trends are observed, for example, with event marketing agencies; 67% of these were asked for creative proposals, which were executed in only 37% of cases. Considering that event concepts are inherently visual, experiential, and logistics-heavy, **excessive pitching poses a significant drain on time and resources**.

SUSTAINABILITY

SHARING SUSTAINABILITY POLICY AND PRACTICES

On average, agencies are asked for their sustainability policy and practices in response to a pitch brief **27% of the time**.

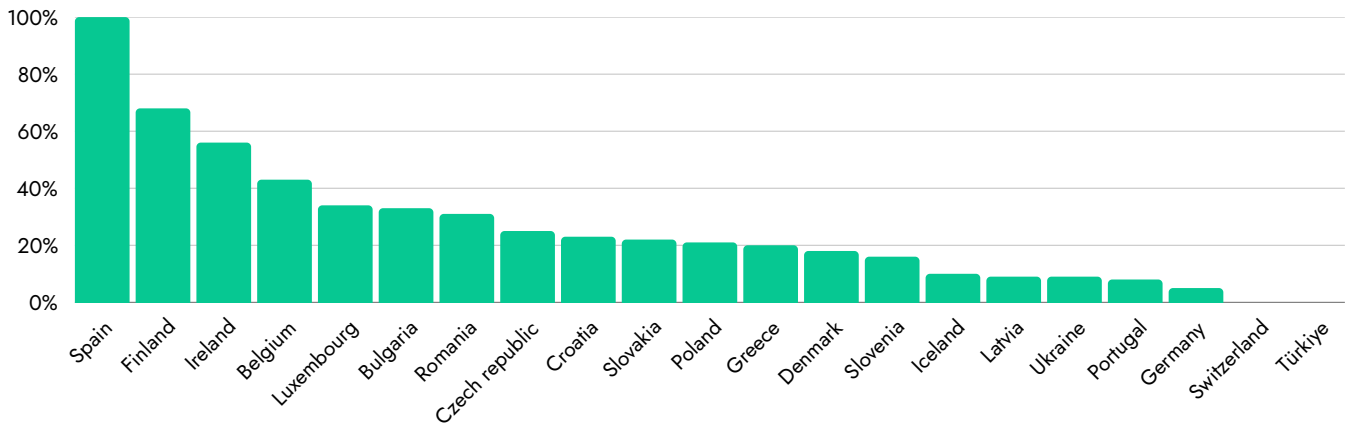
This varies considerably between countries, with Spanish* and Finnish respondents the most likely to be asked for this information (100% and 68% respectively).

Respondents from Switzerland and Türkiye report never being asked for this information, however these responses are based on a sample size of 1 respondent each and therefore may not reflect wider national sentiment.

Respondents from Spain, Finland, Ireland, Belgium, Luxembourg, Bulgaria, and Romania report being asked for their sustainability information at an above-average rate. In the EACA 2024 Sentiment Survey, Finland and Luxembourg were the most likely to think it important for their agency to demonstrate a strong commitment to sustainability.

This somewhat contradicts the strong commitment to sustainability we know exists across the industry, as 90% of respondents to that same EACA 2024 Sentiment Survey agreed that the industry has an important role in changing consumer behaviours.

% OF TIME AGENCIES ARE ASKED FOR SUSTAINABILITY POLICY AND PRACTICES IN RESPONSE TO A PITCH

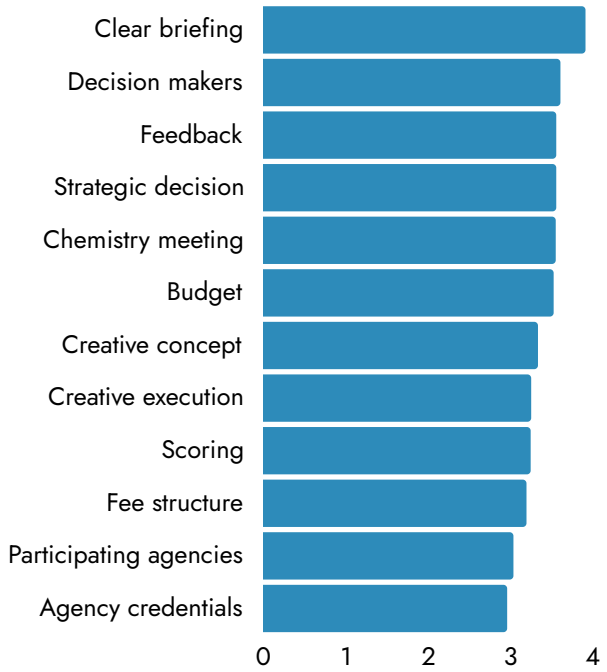


**Note: Germany, Spain, Switzerland, and Türkiye represent 1 respondent each, hereby limiting the ability to interpret these countries' results.*

PITCH PROCESS ELEMENTS

IMPORTANCE OF PITCH PROCESS ELEMENTS

On a scale from 1, "Not important", to 4, "Very Important", respondents were asked to rate the importance of pitch process elements. The most important of these were **clear briefing**, **involvement of decision makers,** and **reception of feedback**.



This absolutely reflects respondents' sentiments around the elements that contribute to a successful pitching experience, where a good brief was the most common success factor. Decision-makers and feedback were also both identified as success factors in the open-ended question around successful pitch experiences.

Clear briefing was the most important pitch process element for the majority of agency types. The order of importance of these elements to each type of agency is illustrated in the table below.

Agency type	Most important elements
Branding & design	1. Clear briefing 2. Chemistry meeting 3. Creative execution
Corporate/PR	1. Clear briefing 2. Budget 3. Decision makers
Advertising/ Full-service	1. Clear briefing 2. Creative concept 3. Strategic decision
Digital/ Social/UX/ Influencer	1. Clear briefing 2. Feedback 3. Decision makers
Event marketing	1. Clear briefing 2. Feedback 3. Chemistry meeting
Media buying & planning	1. Clear briefing 2. Decision makers 3. Strategic decision

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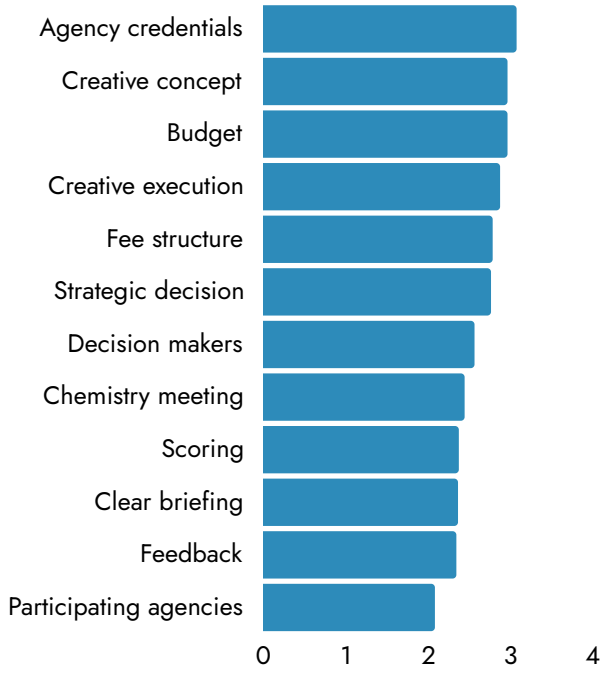
PITCH PROCESS ELEMENTS

PITCH PROCESS ELEMENTS IN PRACTICE: WHAT'S PRIORITISED VS. OVERLOOKED

Information on participating agencies, feedback, and **clear briefing** are the three elements least likely to be part of the pitch process. This accounts for agencies' frustrations and views that excessive competition, lack of feedback and poor brief all contribute to negative pitch process experiences.

Agency credentials, creative concept, and **budget** are the elements most likely to feature in a pitch process. The frequency with which the remaining elements are part of the pitch process are shown on the below chart, on a scale from 1, "Never", to 4, "Always".



There was also some variability in how frequently various elements are included in the pitch process based on the agency type, showing some inconsistencies among different service groups.

Agency type	Most frequent elements
Branding & design	1. Agency credentials 2. Fee structure 3. Budget
Corporate/PR	1. Agency credentials 2. Creative execution 3. Creative concept
Advertising/ Full-service	1. Creative concept 2. Creative execution 3. Agency credentials
Digital/ Social/UX/ Influencer	1. Agency credentials 2. Budget 3. Creative concept
Event marketing	1. Budget 2. Creative concept 3. Fee structure
Media buying & planning	1. Budget 2. Fee structure 3. Agency credentials

ARTIFICIAL INTELLIGENCE

IMPACT OF AI ON PITCHING IN 2024

Overall, AI was used by agencies in 2024 mainly as a support tool rather than a core component of pitch execution. AI was seen to have impacted pitches in 3 major ways:

1. **Costs:** Several agencies reported that AI contributed to reduced costs, primarily in creative execution (e.g., storyboards, animatics, key visuals, voiceovers, and video edits). Some respondents noted that while they have not seen any cost savings because of AI yet, they expect to in the future.
2. **Process efficiency and productivity:** Some respondents found that using AI, they were able to accelerate proposal development, through quicker research, brainstorming visualisation and content generation.
3. **Client relationships and expectations:** For the most part, AI was seen to have a limited impact on client relationships, however some agencies reported pressure from clients to understand how and if they are on top of AI and a general need to have an explainable AI approach. Other agencies are working their own AI-based solutions in response to client interest. Certain clients, however, are explicit about not accepting the use of AI in creative deliverables.

Some respondents drew attention to the **potential downsides of using AI**, through quotes such as:

- "It impacted badly when we tested our campaign with storyboards made with AI."
- "It raised a lot of legal doubts and sometimes suggested reducing human labour costs to our detriment"
- "Risk of AI-Generated Content Feeling Impersonal."

ARTIFICIAL INTELLIGENCE

IMPACT OF AI ON PITCHING IN NEXT 2 YEARS

When asked how AI may impact pitching in the next 2 years, the most common theme that emerged from responses was that of **cost reduction and efficiency gains**. This was highlighted in quotes such as:

- "Reduce the level of expenses, create evaluation frames, help structure briefs."
- "It certainly contributes to faster and more efficient work = lower costs."
- "It will significantly reshape the cost structures but while it will bring efficiency gains, it also require significant investments."

Agencies also expect to see improvements in **speed and productivity**, by accelerated workflows, improved turnaround times, and optimised processes. References include:

- "Earn time in elaboration - execution of original ideas."
- "It will reduce hours required agency side."
- "It will speed up the responses and level the field for smaller and bigger agencies."

Regarding AI's role in **creativity**, some respondents took a positive view (e.g. "Very much so, especially as part of the creative process"), while others were more sceptical (e.g. "As a tool it is significant, not when producing creative conceptual ideas.").

Other quotes regarding **limitations** of AI's applicability to the industry in future include:

- "Due to its inherent unreliability and issues around IP and sensitive client business information I can't see it substantially impacting these areas further."
- "AI will drive faster, more cost-effective, and data-driven pitches, but agencies must carefully balance automation with human creativity to maintain differentiation and trust."

FUTURE FOCUS AREAS

ADDITIONAL QUESTIONS TO INCLUDE

We asked respondents if based on their experience, and knowledge of the industry, there are any questions they feel should have been included. The most common theme respondents wanted to know more about was around renumeration and pay. There were also requests to get more insight on the client perspective of pitching to better understand the process. These questions are outlined below and we will keep these in mind for the next wave of this EACA survey.

Focus Area	Question
Pay & Costs	What proportion of pitches are paid? How were the pitches compensated? How is the investment in the pitches funded? Are you billing potential customers a rejection/participation fee in the case you don't win the pitch? Why do clients not compensate agencies for the provision of creative concepts and executions as part of the pitch process? Are advertisers willing to pay a fee to cover contenders expenses? If yes, what is the level of that fee? What is the average rejection fee? What would be an acceptable level of reimbursement that fairly compensates agencies for their investment while maintaining a competitive and transparent selection process? What barriers have you encountered in implementing a pitch tax? What specific additional costs does the agency incur?
Implementation	How many of the ideas that won the pitch have been implemented in the end? What percentage of the proposals won the pitch could actually be used in the final product?

FUTURE FOCUS AREAS

ADDITIONAL QUESTIONS TO INCLUDE

Focus Area	Question
People Resources	If a pitch wins, to what extent will the people involved remain on the account? Has remote work changed how teams collaborate on pitches, and if so, in what ways has this affected pitch quality or outcomes? What is the impact of pitching on stress and mental health?
Pitch Application	How many pitches out of the total number offered do you apply for? How many pitches you win on average? How clients choose agencies for the pitch On average what is the number of agencies invited? How often is this communicated by clients? How many participating agencies do you consider still viable to participate in the tender process? What percentage of pitches match with rules for fair tender? Do you feel clients are fair in their pitch expectations and requirements?
Feedback & Decision	Is the feedback that was provided in pitch decks useful? How does the feedback process work after a pitch, and how can it be improved to ensure more constructive insights for agencies? How was the tender judged - by price or by creativity? How many pitches were completed with no response? How often do clients provide meaningful feedback after unsuccessful pitches?

FUTURE FOCUS AREAS

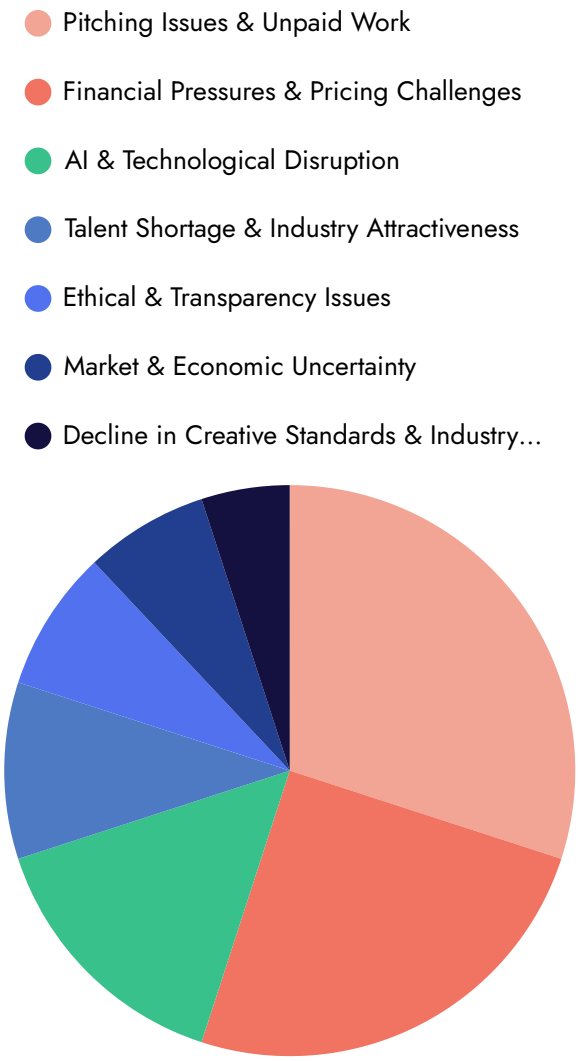
ADDITIONAL QUESTIONS TO INCLUDE

Focus Area	Question
Misc.	Are there regulated pitch processes? How long do pitch processes usually last? What emerging client demands do you expect to shape pitch strategies in the near future (e.g., diversity, inclusivity, digital-first approaches)? What is the role of media auditors in pitch processes? Are agencies doing co-pitching and how?

MAIN CONCERNS

MAIN CONCERNS AROUND THE INDUSTRY

The final question of the survey asked participants what their main concerns are for the industry at the moment. Analysis of the open-ended responses showed several key themes, which are shows on the chart below. Please note that the distribution is illustrative and based on an approximate weight of concerns across the industry based on the responses.



Sample quotes to illustrate these concerns are given below.

Pitching Issues and Unpaid Work

- "Clients fishing for free ideas. Clients asking for pitches without a real need for agency work. Other agencies under pricing to win pitches."
- "Pitches often run only to save costs and not seek value."

Financial Pressures and Pricing Challenges

- "Agency prices dropping, agency salary expectations rising, less secured business on a yearly basis, too many agencies on the market, connections and pre-arranged deals being the leading force at pitches - this all leads to a very uncertain future."

AI and Technological Disruption

- "The impact of AI and clients who will choose low-end agencies who will create average content using AI but at way more affordable rates."
- "Over-reliance on AI: while AI can streamline many processes, there's a risk of over-dependence, potentially diminishing creativity and the personal touch that clients value."

MAIN CONCERNS

MAIN CONCERNS AROUND THE INDUSTRY

Talent Shortage and Industry Attractiveness

- "The churn of staff combined with the industry not be "appealing" to younger talents vs tech companies, start-ups and the "big" consulting Firms."

Ethical and Transparency Issues

- "The motivation for pitches on the client side has changed in recent years, everything is about pricing nowadays."
- "Relational ties take precedence over pitch neutrality."

Market and Economic Uncertainty

- "Europe's inevitable economic crisis."
- "Less business due to disturbance in the world."

Decline in Creative Standards and Industry Value

- "Low appreciation for great creativity and unprofessional, too junior decision-makers."

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2025