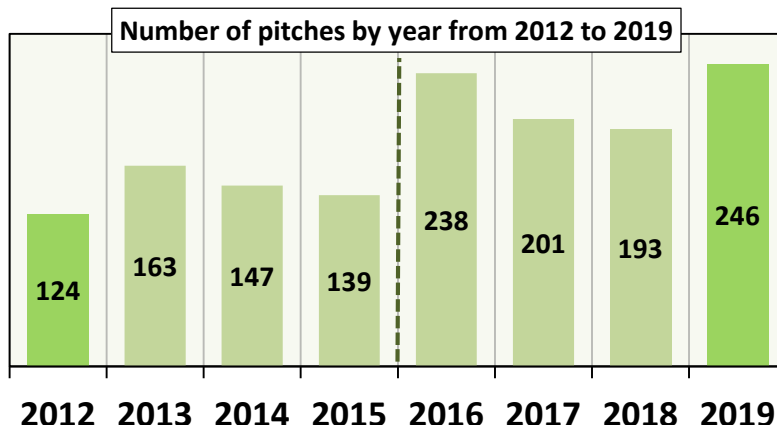


Top int'l advertiser pitches **up by 27%** in 2019: Less global reviews and more local decisions

The average number of pitches per year is around 220 since 2016 whereas from 2012 to 2016, the average was around 145.



Every year, RECMA conducts several studies and analysis about pitches. The latest report *Pitch process 2019* has just been released: a focus on the **Top 150 int'l advertisers + major regional players, excluding locals**. Full report available on www.recma.com for subscribers. Here are excerpts:

1- More and more local reviews.

Local means decisions taken at a country level. Ex.: **Nestlé** with 17 reviews, **RB** (15) and, to a minor extent, **Ferrero** (9), **Beiersdorf** (7) or **Coca-Cola** (7). The total number of the local reviews increased to 180 in 2019 from 129 in 2018

2- Fewer Global pitches from the Top 150 advertisers:

Out of the 34 global reviews in 2019, only 9 were from this family of advertisers vs 18 in 2018. Consequently, the overall volume at play in 2019 has decreased by 18%.

However, there is an increase in the number of Global pitches from mid-sized advertisers (Mattel, Groupe SEB, Chevron, UPS, Menarini...)

3- Online services advertisers are responsible for a quarter of the Global pitches: 9 out of 34 reviews: Ebay, Tripadvisor, Just Eat, Pokerstars, Hotels.com, Airbnb, TikTok, Groupon, and Deliveroo.

4- Disney was the biggest open pitch of the year (\$ 1944m), with a clear gap towards the second biggest advertiser Vodafone \$ 638m, not considering the local P&G move in the USA from Hearts & Science to Carat (\$ 1722m).

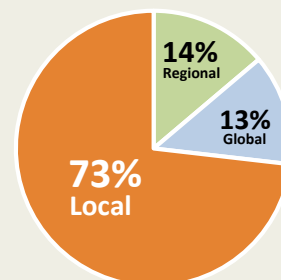
A year before, in 2018, five advertisers between \$ 800m to \$ 1.5bn did a pitch: GSK, Mars, Chrysler, Mondelez, Microsoft and, in 2017, four advertisers, spending from \$700m to \$ 1.5bn: Amazon, AB-Inbev, PSA- Peugeot and Sanofi.

5- The retention rate is of 24%.

Based on the 246 pitches only 58 advertisers have retained the incumbent agency: 24% retention rate. Examples of retention : Hyundai-Kia, Unicredit, MSC Cruises, Novartis, Chevron, GoPro, Beiersdorf Nordics, etc...

Decisions of account moves are mostly taken locally

Local Global Regional



The Pitch Cycle research studies global and multi-markets advertisers (spending above \$10m in the latter case).

Local pitch stands for decisions taken at a country level.

In 2019, the share of the local reviews compared to 2018 increased to 73% from 66%.