



# MEDIA AGENCY NEW BUSINESS BAROMETER

FULL YEAR 2022

# SWITZERLAND

# KEY POINTS OF METHODOLOGY

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- Each quarter, COMvergence produces country New Business Barometers based on **media account moves and retentions**. The aim of this study is to assess agency performances in new business. Key rules for inclusion are as follows:
  - 1- **date of official announcement** of the pitch outcome (which can differ from the effective date of the move)
  - 2- **regional/global account consolidations** after or without pitch
  - 3- **local account moves** with or without pitch
  - 4- **retentions** after an open or competitive pitch (involving other agencies than the incumbent). Contract extension/renewals without pitch are excluded

**Short-term projects and account transfers *between two agencies of the same group are not considered in the assessment.***

- In France, all accounts whose total net media spend  $\geq$ \$0.3M are taken into consideration.

- All data is pulled from COMvergence's proprietary CARD online database. Total net media spend estimates are based on the aggregation of:
  - 1- **offline** net estimated spends sourced from Focus Media (2021) data deflated by an overall discount rate of -40%
  - 2- **digital** media spend estimates: based on COMvergence proprietary methodology consisting of applying digital shares per category or corrected shares submitted by the agencies (and validated through client statement or agency CFOs)

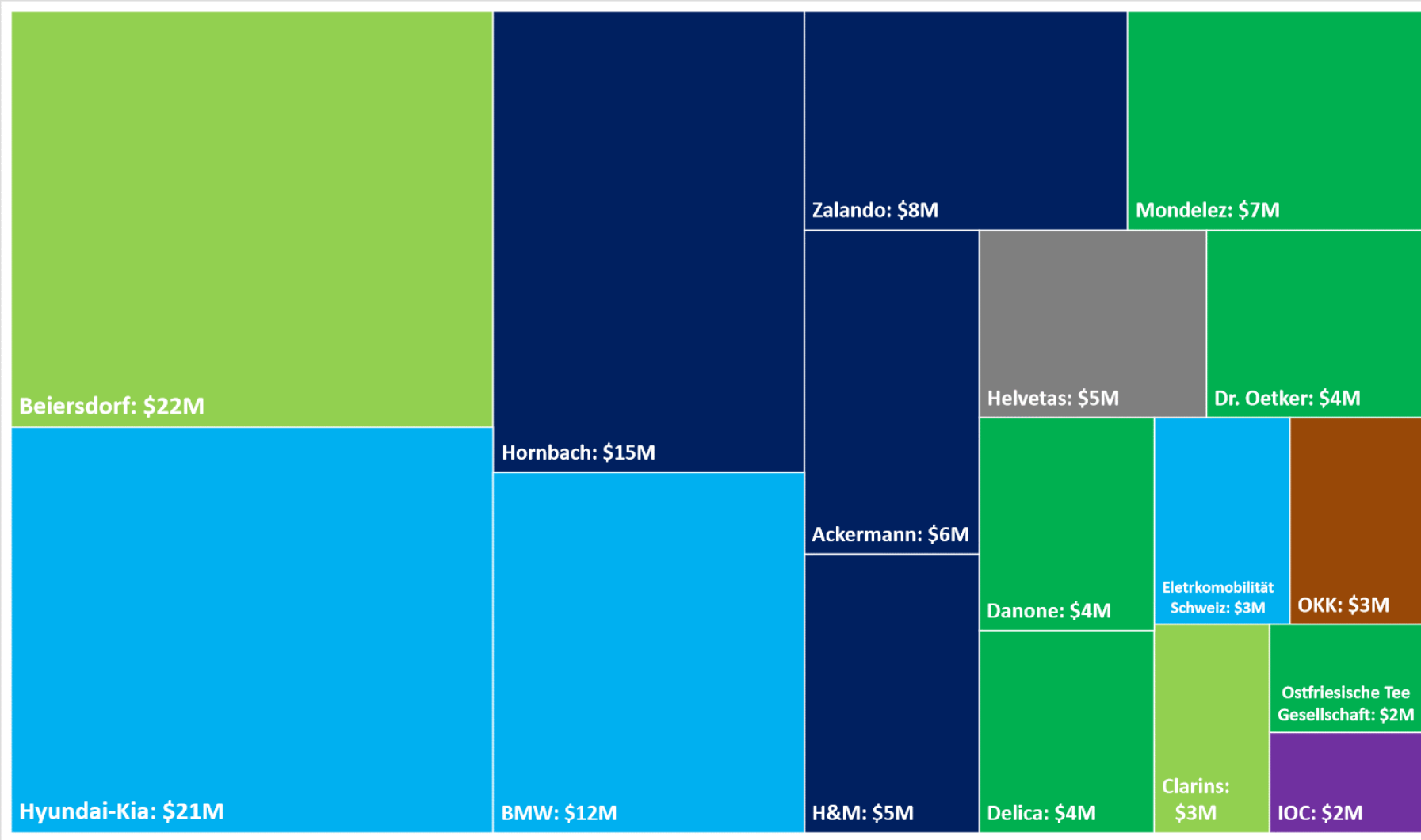
- Two rankings are produced:
  - 1- **Total New Business Values** (incl. retentions) by **Agency**
  - 2- **Total New Business Values** (incl. retentions) by **Group**

- Through the online app (C-Dash NBB), our members can access the interactive rankings and charts with various options of displaying the results (excluding the retentions, selecting local or multi-market pitches only, etc.).

# TOP MEDIA PITCHES & MOVES CONCLUDED IN 2022

(BUDGET >\$2M OUT OF TOTAL SPEND REVIEWED OF \$151M)

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# DIGEST

 **49** account moves and pitches

**42** won/retained by media agency networks (\$120M)

**7** by independents/in-house/non-network agencies (unaffiliated/int'l groups)

**12** retained by incumbent

 **\$151M** total spending

**\$93M** from global & multi-market pitches (25)

**\$58M** local pitches (24)

**\$61M** in retentions (40%)

 **Top 5** media pitches & moves

- |                |       |
|----------------|-------|
| 1. Beiersdorf  | \$22M |
| 2. Hyundai-Kia | \$21M |
| 3. Hornbach    | \$15M |
| 4. BMW         | \$12M |
| 5. Zalando     | \$8M  |

 **Total New Business** value (including retentions)

 **dentsu international** **+\$35M**

 **Mediabrand** **-\$6M**

# NEW BUSINESS RANKING FY 2022 BASED ON TOTAL NEW BUSINESS VALUES

**SWITZERLAND**

MEDIA AGENCIES		TOTAL New Business incl. retentions in \$US M	LOSSES		NEW CLIENT WINS		RETENTIONS			NET New Business excl. retentions in \$US M
			#	Total Spend in \$US M	#	Total Spend in \$US M	#	Total Spend in \$US M	Retention Rate	
1	Mediaplus	+29			5	29				+29
2=	Carat	+22			1	1	1	22	100%	+1
2=	EssenceMediacom	+22	2	-2	7	20	2	3	69%	+18
4=	Havas Media	+12	3	-13	3	4	2	21	61%	-9
4=	iProspect	+12	2	-3	1	8	2	7	71%	+5
6	Zenith	+11			5	11				+11
7	Mindshare	+6	1	-1	4	7				+6
8	Starcom	+3	1	-1	2	3	1	1	50%	+2
9=	dentsu X	+1	1	-7	4	4	2	4	39%	-3
9=	ZipMedia	+1			1	1				+1
9=	PHD	+1			1	1				+1
12	Spark Foundry	+0	2	-2			1	3	54%	-2
13=	Tektur Media	-1	1	-1						-1
13=	Initiative	-1	1	-2			1	1	28%	-2
14=	Mediakanzlei	-2	1	-2						-2
14=	OMD	-2	2	-2						-2
17	Mediatonic	-3	2	-3						-3
18	UM	-5	1	-5	1	1				-5
19	Wavemaker	-7	2	-8	1	1				-7
20	Mediaschneider (Zurich)	-15	1	-15						-15

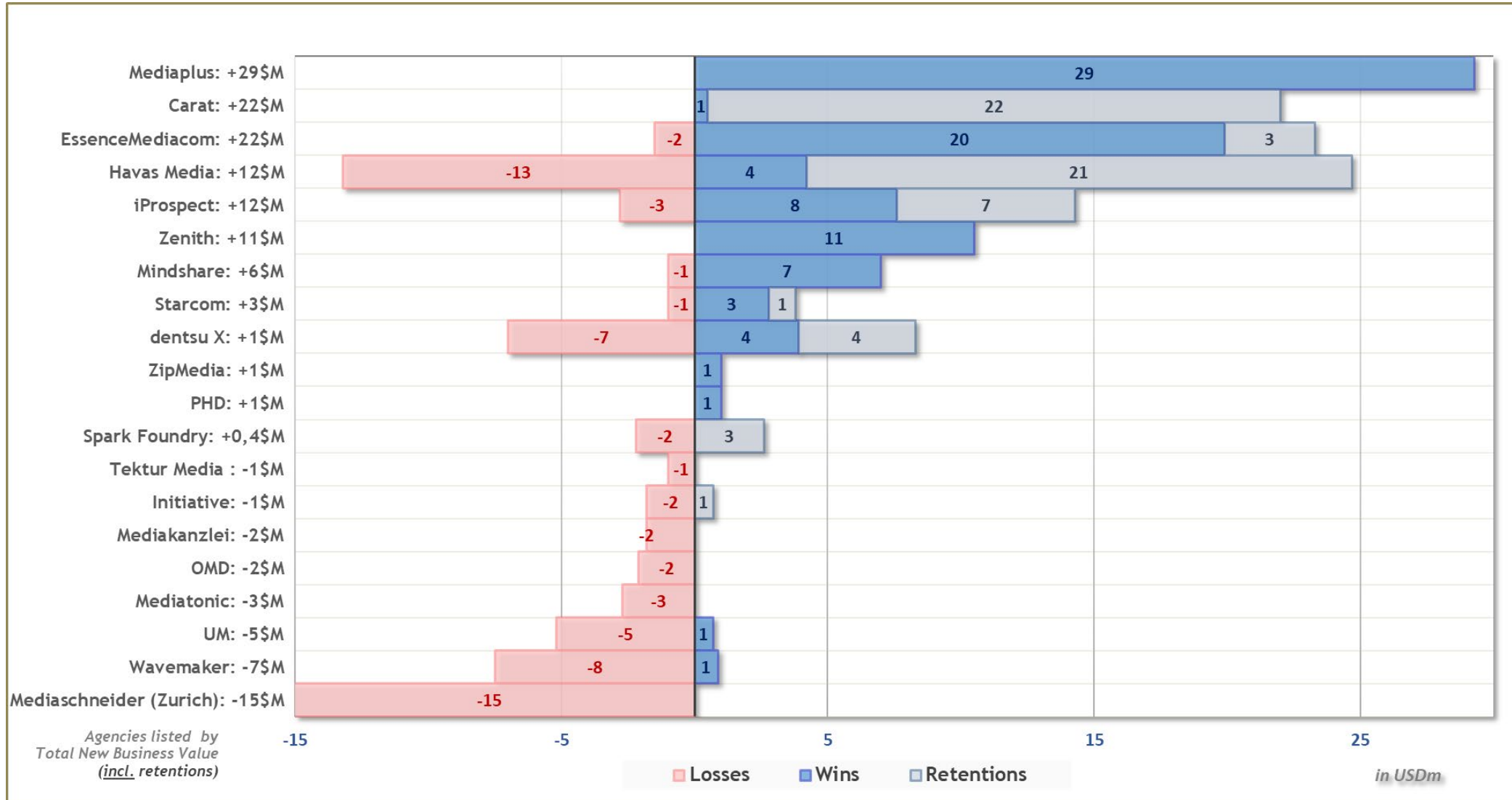
In this report, COMvergence has combined the new business results of Essence and MediaCom under EssenceMediacom.

The merger of the two agencies was effective in early 2023. However, it was announced in May 2022, and both agencies have joined forces in most pitches they participated to in 2022.

*\* Independents & agencies unaffiliated with media agency networks*

# MEDIA AGENCY NEW BUSINESS BAROMETER FY 2022

SWITZERLAND



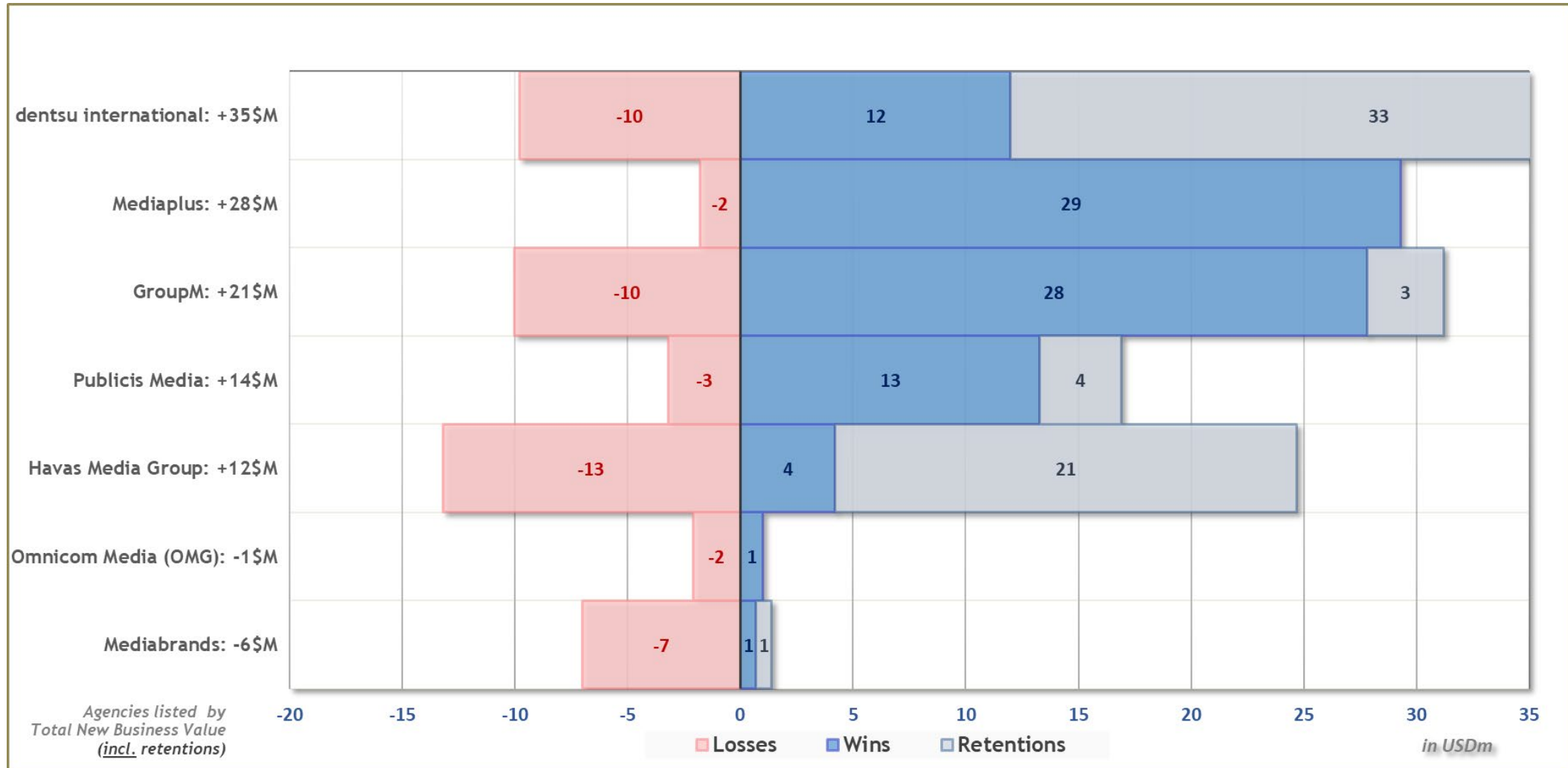
# NEW BUSINESS RANKING FY 2022 BASED ON TOTAL NEW BUSINESS VALUES

SWITZERLAND

	MEDIA AGENCY GROUPS	TOTAL New Business incl. retentions in \$US M	LOSSES		NEW CLIENT WINS		RETENTIONS			NET New Business excl. retentions in \$US M
			#	Total Spend in \$US M	#	Total Spend in \$US M	#	Total Spend in \$US M	Retention Rate	
1	dentsu international	+35	3	-10	6	12	5	33	77%	+2
2	Mediaplus	+28	1	-2	5	29				+28
3	GroupM	+21	5	-10	12	28	2	3	25%	+18
4	Publicis Media	+14	3	-3	7	13	2	4	53%	+10
5	Havas Media Group	+12	3	-13	3	4	2	21	61%	-9
6	Omnicom Media (OMG)	-1	2	-2	1	1				-1
7	Mediabrand	-6	2	-7	1	1	1	1	9%	-6

# MEDIA GROUP NEW BUSINESS BAROMETER FY 2022

SWITZERLAND

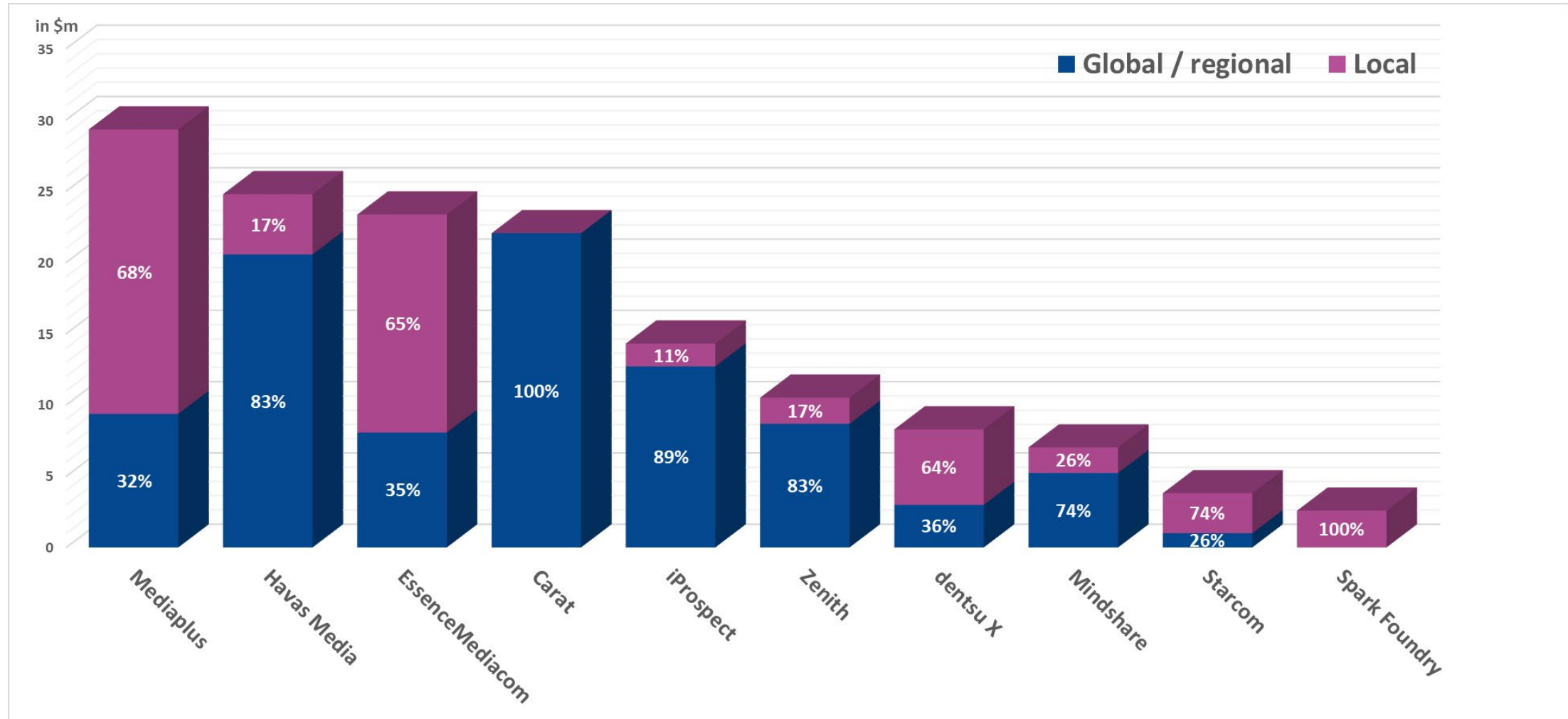




# SHARE OF LOCAL VS. GLOBAL/REGIONAL WINS

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66% OF ASSESSED MEDIA REVIEWS & MOVES GLOBALLY WERE RELATED TO LOCAL PITCHES. SWITZERLAND WAS WELL BELOW THE AVERAGE WHERE LOCAL PITCHES REPRESENTED 38% ONLY OF THE TOTAL MEDIA SPEND REVIEWED.



# APPENDIX 49 PITCHES & ACCOUNT MOVES ASSESSED (1/2)

(LISTED ALPHABETICALLY IN ORDER OF ADVERTISERS)

SWITZERLAND

Advertiser	Brands	Category	Budget (M\$)	Assignments	Media	Agency	Last Incumbent	Quarter of win	Zone coverage
AB InBev	Beck's, Bud Light, Budweiser, Corona, Ho	Alcohol	1,0	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Starcom	iProspect	2022 Q1	Global
Ackermann	Ackermann	Retail	6,1	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	EssenceMediacom	Various	2022 Q1	Local
Activision	Call of Duty, Destiny	Games & Toys	0,7	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	UM	OMD	2022 Q2	Multi-country
AXA	AXA Insurance	Financial & Insurance	1,0	BUY, SEA	DIG	Mindshare	Tektur Media	2022 Q2	Local
Beiersdorf	Aquaphor, Elastoplast, Eucerin, Hansapl	Personal Care	21,5	BUY, CSM, DAT, PLAN, PRG, S	All Offline (TV / PRI / OOH / RAD / CIN), DI	Carat	Retained	2022 Q4	Multi-country
Beurer	Beurer	Electronics	0,3	BUY, PLAN	TV	Mindshare		2022 Q3	Local
BMW	BMW, MINI, Rolls-Royce	Automotive	5,1	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN)	iProspect	Retained	2022 Q3	Multi-country
BMW	BMW, MINI	Automotive	7,0	BUY, PLAN, PRG, SEA, SOC	DIG	Mediaplus	dentsu X	2022 Q4	Multi-country
Casino Davos	Casino Davos	Gambling	0,5	BUY, SEA	DIG	Mindshare		2022 Q1	Local
Chaplin's World	Chaplin's World	Entertainment & Media	1,0	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Local agency	Spark Foundry	2022 Q1	Local
Clarins	Clarins	Personal Care	2,6	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Spark Foundry	Retained	2022 Q4	Local
Comparis	Comparis	Financial & Insurance	1,0	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	dentsu X		2022 Q2	Local
Cornèrcard	Cornèrcard	Financial & Insurance	0,5	BUY, PLAN	DIG	dentsu X		2022 Q1	Local
Danone	Actimel, Bledina, Danone, Evian	Food	2,1	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN)	EssenceMediacom	Retained	2022 Q2	Global
Danone	Actimel, Activia, Alpro, Bledina, Danone,	Food, Soft Drinks	1,8	BUY, PLAN, SEA	DIG	EssenceMediacom	iProspect	2022 Q2	Global
Delica	Delica	Food	3,8	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	dentsu X	Retained	2022 Q1	Local
Dr. Oetker	Die Ofenfrische, Paula, Vitalis Muesli, W	Food	4,4	BUY, CSM, DAT, PLAN, PRG, S	All Offline (TV / PRI / OOH / RAD / CIN), DI	EssenceMediacom	Havas Media	2022 Q4	Local
Elektromobilität Schweiz	Elektromobilität Schweiz	Automotive, Energy	3,0	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	EssenceMediacom		2022 Q1	Local
Eli Lilly	Cialis, Confidential, Evista, Forsteo, Hum	Pharmaceutical	0,5	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Zenith		2022 Q3	Local
Geberit	Geberit	Home Goods	1,0	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	ZipMedia	EssenceMediacom	2022 Q4	Local
H&M	H&M	Clothing	5,2	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Mindshare	UM	2022 Q4	Multi-country
Helvetas	Helvetas	Organizations	4,6	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Mediaplus		2022 Q2	Local
Hornbach	Hornbach	Retail	15,4	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Mediaplus	Mediaschneider (Zurich)	2022 Q2	Local

# APPENDIX 49 PITCHES & ACCOUNT MOVES ASSESSED (2/2)

SWITZERLAND

(LISTED ALPHABETICALLY IN ORDER OF ADVERTISERS)

Advertiser	Brands	Category	Budget (M\$)	Assignments	Media	Agency	Last Incumbent	Quarter of win	Zone coverage
Hyundai	Hyundai	Automotive	12,7	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Havas Media	Retained	2022 Q4	Global
IOC	IOC, The International Olympic Committee	Entertainment & Media	1,7	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Havas Media		2022 Q4	Local
Jack Wolfskin	Jack Wolfskin	Retail	1,2	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Mediaplus	Mediatonic	2022 Q4	Multi-country
Kia	Kia	Automotive	7,8	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Havas Media	Retained	2022 Q4	Global
Kimberly-Clark	Camelia, Huggies, Kleenex, Kotex	Personal Care	1,0	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	PHD	Mindshare	2022 Q2	Multi-country
Klarna Bank	Klarna	Financial & Insurance	1,4	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	EssenceMediacom	Unknown	2022 Q1	Multi-country
Laederach	Laederach	Food	1,3	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Zenith	New-advertiser	2022 Q2	Local
Lenovo	Lenovo, Motorola	Electronics, Technology & IT	1,2	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN)	Mediaplus	Spark Foundry	2022 Q1	Multi-country
Maxi Zoo	Maxi Zoo	Retail	1,4	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	EssenceMediacom	OMD	2022 Q4	Multi-country
McCormick	Ducros, Frank's RedHot, French's, Kamis	Food	1,0	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	dentsu X	Starcom	2022 Q3	Global
Merck	.Merck Sharp & Dohme MSD (outside N.A.)	Pharmaceutical	0,7	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Initiative	Retained	2022 Q3	Global
Mondelez	Cadbury, Milka, Oreo	Food	7,0	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Zenith	Wavemaker	2022 Q3	Global
Neho (PropTech Partners)	Neho	Real Estate	1,0	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN)	Havas Media		2022 Q4	Local
OKK	OKK	Financial & Insurance	1,8	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN)	Starcom	Mediakanzlei	2022 Q1	Local
OKK	OKK	Financial & Insurance	1,0	BUY, PLAN	DIG	Starcom	Retained	2022 Q1	Local
Ostfriesische Tee Gesellschaft	Messmer	Soft Drinks	1,8	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	EssenceMediacom	Initiative	2022 Q1	Local
Pandora	Pandora	Accessories	0,5	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Carat	EssenceMediacom	2022 Q3	Global
Pernod Ricard	Absolut Vodka, Avion, Ballantine's, Beefeater	Alcohol	1,6	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Havas Media	Mediatonic	2022 Q4	Local
Roche Diagnostics	Roche Diagnostics	Pharmaceutical	0,9	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Wavemaker		2022 Q2	Local
SEB	All-Clad, Krups, Moulinex, Rowenta, Tefal	Home Goods	1,6	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	iProspect	Retained	2022 Q4	Local
Sony PlayStation	PlayStation	Games & Toys	1,3	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	EssenceMediacom	Retained	2022 Q4	Global
Swarovski	Swarovski	Accessories	1,2	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	Zenith	Havas Media	2022 Q4	Global
Tiffany & Co	Tiffany	Luxury Goods	0,5	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN)	Zenith	Wavemaker	2022 Q1	Global
Upfield	Becel, Flora, Flora ProActiv, I Can't Believe It's Butter	Food	0,6	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	dentsu X	Retained	2022 Q3	Global
UPSA	UPSA	Pharmaceutical	1,4	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN), DI	dentsu X		2022 Q4	Multi-country
Zalando	Zalando	Clothing, Internet, Retail	7,6	BUY, PLAN	All Offline (TV / PRI / OOH / RAD / CIN)	iProspect	Havas Media	2022 Q4	Multi-country