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Region saw 40 per cent more pitches in 2012, representing US\$655 million: R3

By **Staff Reporters** on Feb 8, 2013
filed under **Advertising, Indonesia**

ASIA-PACIFIC - 2012 was the most active year for new business in the decade that pitch consultant R3 has been tracking media and creative pitches in the region for Campaign Asia-Pacific's New Business Performance League, according to a new report.

KEYWORDS

r3, new business league, 2012

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According to R3, more than US\$655 million of revenue was reviewed in 2012, representing a 99 per cent increase over 2011. More than 5000 pitches took place, an increase of 40 per cent over 2011. China and Australia led the way in new business revenue, and WPP dominated in the rankings.

The New Business Performance League tracks new business wins and losses on a monthly basis in Asia-Pacific in close collaboration with 30 of the region's top agencies.

The largest wins of the year include BBDO/Visa and Ogilvy/Philips. The largest retentions include Mindshare and PHD on Unilever and OMD on Johnson & Johnson.

"There's no doubt there's both more pressure on agencies to perform, as well as more clients moving to a 'project based' mentality," said Greg Paull, principal of R3.

China represented 26 per cent of the businesses that were reviewed, in terms of revenue, followed by Australia with 17 per cent and India with 16 per cent. "We're increasingly seeing more clients and agencies hubbed out of China as each year goes by," Paull said.

WPP led both the Asia-Pacific and China Holding Company Leagues for New Business won and lost, with Ogilvy and Mindshare the star performers. In Asia-Pacific, WPP won 33 per cent of all new business (US\$213 million), ahead of Omnicom (US\$155 million) and a much improved Interpublic Group (\$113 million), driven by strong results from McCann Erickson in select markets, R3 reported.

In China, WPP returned to the top position among holding companies, with a strong performance from Ogilvy, JWT and their media agencies. The group collected 38 per cent of all new business (RMB419 million in new business revenue) followed by last year's leader, Publicis Groupe at RMB239 million), Omnicom (RMB175 million) and Aegis (RMB153 million).

"It was a strong year overall for Aegis, whose media agencies outperformed all

Agency	2012 New Business Revenue (US\$ million)	2011 New Business Revenue (US\$ million)	% Change
WPP	213	107	99%
Omnicom	155	155	0%
Interpublic Group	113	113	0%
McCann Erickson	113	113	0%
Ogilvy	107	107	0%
Mindshare	107	107	0%
PHD	107	107	0%
Unilever	107	107	0%
Johnson & Johnson	107	107	0%

[2012 Asia-Pacific new-business revenue \(by market\) \(click to enlarge\)](#)

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the others, winning 34 per cent of all media agency activity" Paull said.

Asia-Pacific Holding Company New Business League, 2012:

	Creative (US\$m)	Media (US\$m)	Total (US\$m)	VS 2011
WPP	141.8	71.3	213.1	118.8%
Omnicom	104.1	51.6	155.7	64.2%
Interpublic	86.4	26.7	113.1	9575.2%
Publicis	58.2	38.0	96.2	9.8%
Aegis	0.0	55.9	55.9	173.1%
Havas	-2.0	8.7	6.8	-68.9%

China holding company New Business League, 2012:

	Creative (RMB¥m)	Media (RMB¥m)	Total (RMB¥m)	VS 2011
WPP	339.8	79.2	419.0	245.8%
Publicis	150.6	89.2	239.7	205%
Omnicom	72.4	102.6	175.0	90.3%
Aegis	0.0	153.7	153.7	105.3%
Interpublic	108.5	18.5	127.0	524.8%
Havas	-12.5	10.3	-2.2	-103.7%

Australia was the location for seven of the year's top 10 creative agency wins, with Westpac, Commonwealth Bank, Optus, Arnotts, Vodafone, Honda and Telstra all reviewing in the year.

"This reflects the maturity of the Australian market to appoint more AOR relationships, while more and more Asian marketers are working with creative agencies on a project basis—as high as 51 per cent of all relationships in China," Paull said.

Amongst media agency wins, the Unilever, P&G and Johnson & Johnson reviews represented five of the top 10, led by PHD's retention in Greater China of Unilever. Other major wins included Mindshare China's Yili and OMD's HTC Asia-Pacific win.

Since 2002, R3 has collected more than 30,000 wins and losses, and individually analyzed and calibrated their likely billings and revenue, based on Nielsen ADEX data, client feedback and other agency references. R3 estimates agency revenue based on 1/10 of billings for creative agencies and 1/20th of billings for media agencies.

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...but how many of these pitches were PAID?
 I'd wager for at least Singapore's part, not many.

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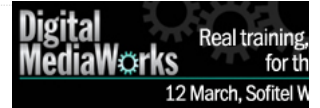
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