

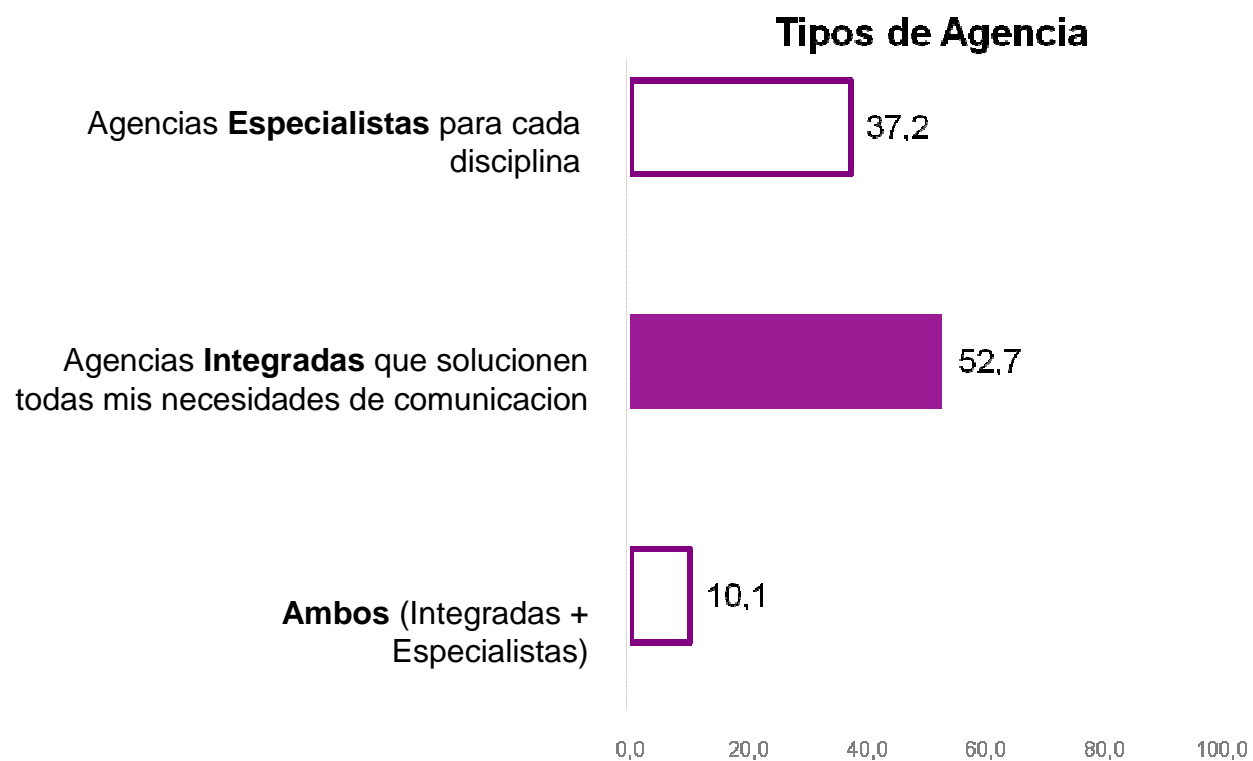


## Perfil de la Muestra | Datos demográficos y profesionales

Zona geográfica	%	Sector	%	Tipo de Empresa	%	
Londres	<b>64.3</b>	Finanzas y Seguros	<b>14.5</b>	Empresa Multinacional	<b>77.3</b>	
Sur	17.9	Telecomunicaciones y Comunicación	<b>9.2</b>	Empresa Nacional	16.4	
Norte	6.8	Textil y vestimenta	<b>8.7</b>	Empresa Pública	4.3	
Este	5.3	Alimentación	<b>8.2</b>	Asociación, ONG's	1.9	
Midlands	2.4	Automoción	<b>7.7</b>	<b>Total</b>	<b>207</b>	
Escocia	1.9	Transporte, Viajes y Turismo	<b>6.8</b>	<b>Género</b>	<b>%</b>	
Internacional	1.4	Salud, farmacia y parafarmacia	<b>6.3</b>	Hombre	<b>57.0</b>	
<b>Total</b>	<b>207</b>	Bebidas	<b>5.3</b>	Mujer	43.0	
<b>Cargo</b>	<b>%</b>	Energía	4.8	<b>Total</b>	<b>207</b>	
Presidente, CEO, Director General	1.9	Carburantes y aceites	3.9	<b>Antigüedad</b>	<b>%</b>	<b>%</b>
VP Marketing / CMO	3.4	Belleza, perfumería e higiene	3.9		<b>Empresa</b>	<b>Puesto</b>
Director (Marketing, Publicidad, Comunicación, Medios, Digital)	<b>48.3</b>	Cultura, Enseñanza y Medios de Com.	2.4	Menos de 1 año	0.5	2.4
Head (Marca, Comunicación, Estrategia)	<b>19.8</b>	Household Products	2.4	1 año	14.5	36.7
Global Head (Marca/ Publicidad)	4.3	Servicios Públicos	2.4	2 años	15.0	26.6
Senior Manager	5.3	Fast Moving Consumer Goods (FMCG)	1.4	3 años	10.1	13.0
Manager (Publicidad, Marketing, Brand Manager, CRM)	14.5	Hogar y Electrodomésticos	1.0	4 / 5 años	17.4	10.6
Compras	2.4	Deportes	0.5	6 / 7 años	13.5	7.2
<b>Total</b>	<b>207</b>	Equipos de Oficina e informática	0.5	8 / 9 años	9.7	1.4
		Construcción	0.5	10 años	3.9	1.4
		Tabaco	0.5	Más de 10 años	15.5	0.5
		Otras	9.2	Media (años)	<b>6.24</b>	<b>2.58</b>
		<b>Total</b>	<b>207</b>	<b>Total</b>	<b>207</b>	<b>207</b>

# Selección de Agencia | Cómo se plantea el “pool” de agencias

(%)



Base: 207 profesionales entrevistados

# Selección de Agencia | Criterios de Selección

(%)

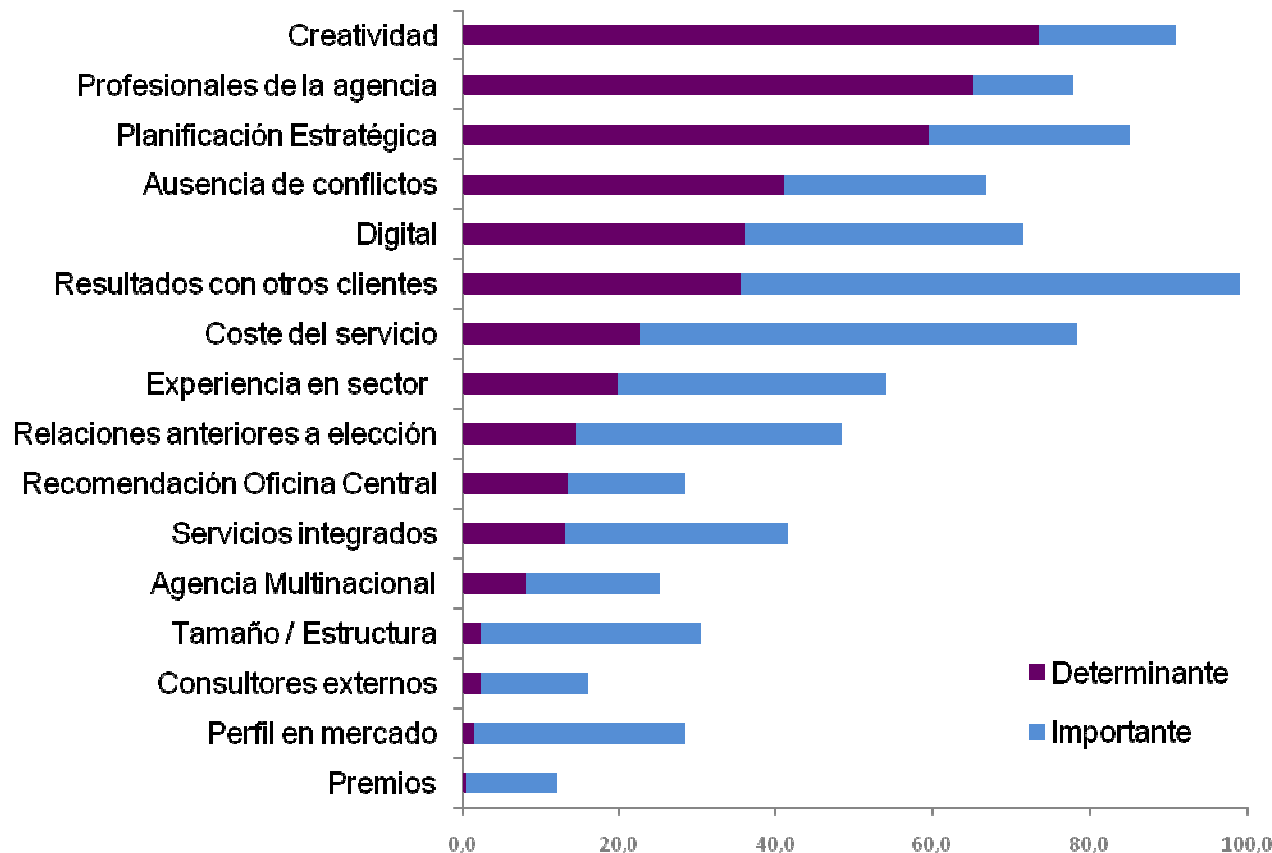


Base: 207 profesionales entrevistados

- Creativity is the most important attribute when selecting an agency. For 73% of marketers it is 'Very Important'.
- Second most mentioned attribute as 'Very Important' is the agency's team, its people and professionals. Key for 65% of interviewees.
- The third most important attribute is strategic planning (60%).
- Clients do not want an agency working for their competitors (conflicts) and Digital Capabilities are the fifth most mentioned attribute.
- The agency size, help of consultants, agency profile in the industry or awards are nearly not mentioned.
- We have to bear in mind that awards are intimately related with creativity,. The most awarded agencies are the ones with a higher creative reputation but no marketing manager mentions giving an account to an agency because of its awards.

# Selección de Agencia | Criterios de Selección

(%)

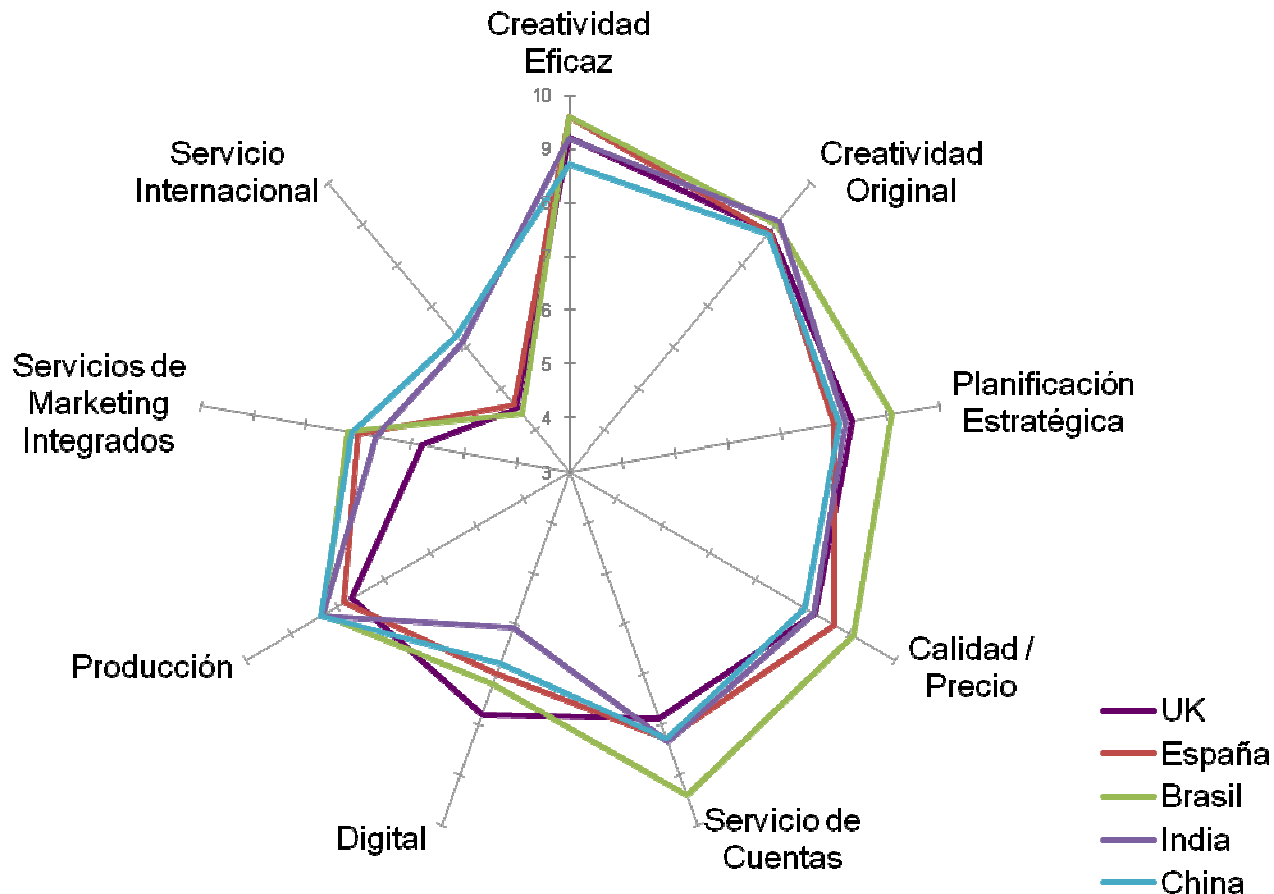


Base: 207 profesionales entrevistados

- When we add mentions for 'Important' attributes, Creativity is still the most important attribute (mentioned altogether by 91% of marketers).
- It is important to notice that Effectiveness (results for other clients) is the second most mentioned attribute when we add mentions for 'Very Important' + 'Important'.
- The third most important attribute is strategic planning (60%), and when we add mentions as an important attribute it is also third most mentioned.
- The cost of service is not mentioned very much as 'Very Important' but more as an Important attribute on a second level of importance. No agency would drop from the process at a first stage because of its Fees but these will be negotiated in subsequent conversations with them.
- Clients want to work with agencies that have experience in a similar sector (in the past) but with no conflict in the present.

# Selección de Agencia | Importancia Atributos de Servicio por países

Media países



Base: profesionales entrevistados en cada país

- Three most mentioned attributes in Spain are original creativity, effective creativity and production execution. Ideas and innovation are most demanded.
- Brazilian marketers consider effective creativity, account service, and strategic planning, the most valued attributes. They are the most demanding clients.
- In India effective creativity, original creative, and, equally, production execution and account service are the most valued attributes.
- In China the three most mentioned attributes are original ideas, effective creativity and production execution.
- In China and India, marketers value highly international network because it is a way of differentiating Multinational agencies from locals. Multinationals in these two emerging countries are preferred over independents as they are seen more qualified to solve their needs.
- Digital is less valued in India (the most is in the UK).

# Selección de Agencia | Características de la Agencia Integrada Ideal

(%)

## Características Agencia Integrada Ideal



- When UK marketers think of the 'ideal' integrated agency the most valuable attribute for them is the proven experience/knowledge of the agency in the market, in a similar sector or delivering integrated campaigns. Nearly 50% have this in mind.
- Creativity and innovation is the second key attribute.
- Effectiveness is spontaneously mentioned by less than 10% of clients.
- Integrated services is, of course, key when defining integrated agencies (35%), the rest give for granted that these agencies will be integrated.

Media de menciones= 2.68

Base: 98 profesionales que dicen trabajar con agencias integradas

# Selección de Agencia | Características de Agencia de Publicidad Ideal

(%)

## Características de Agencia de Publicidad Ideal



- And when the 186 marketers that prefer to work with a specialised advertising agency, define the 'ideal' one, creativity comes also in first place (mentioned by 58%).
- Strategic planning and the knowledge/experience of the agency are the second most mentioned characteristics.
- Surprisingly Effectiveness is only mentioned by 7% of interviewees.

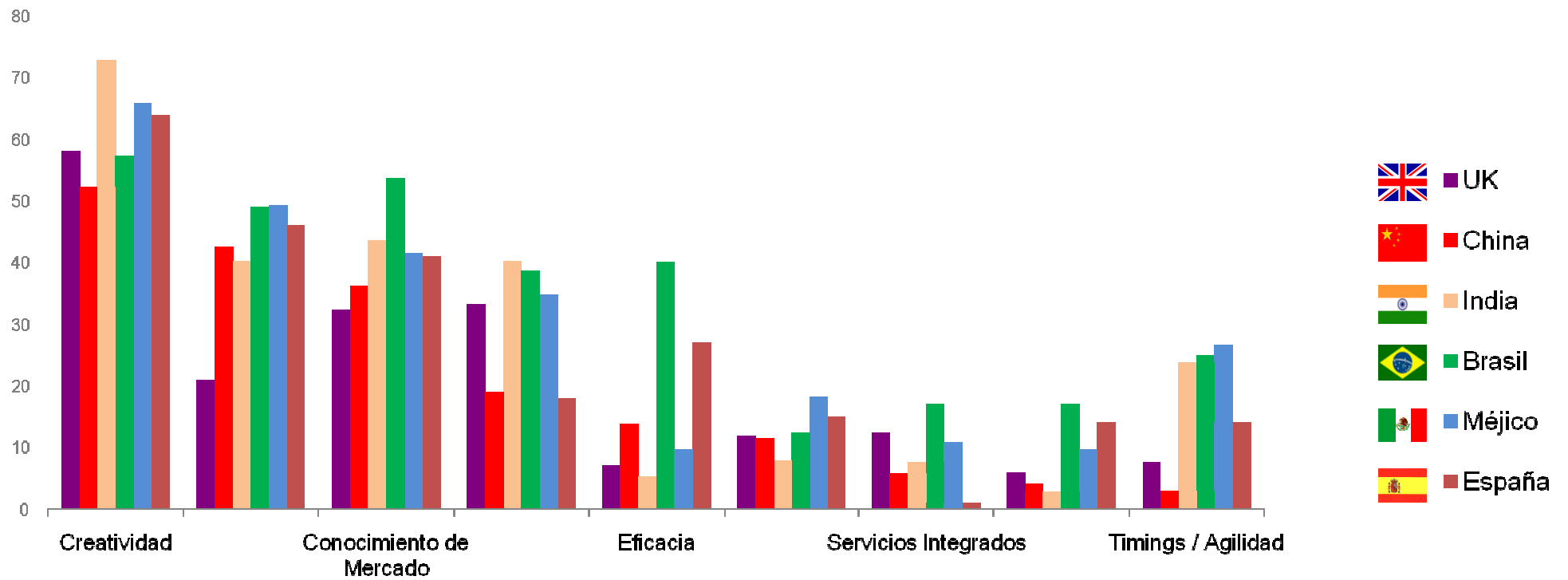
Media de menciones = 2.89

Base: 186 profesionales que dicen trabajar con agencias especialistas (publicidad)



# Selección de Agencia | Características de Agencia de Publicidad Ideal (por países)

(%)



Base: profesionales entrevistados en cada país

# Selección de Agencia | Características de Agencia Digital Ideal

(%)

## Características Agencia Digital Ideal



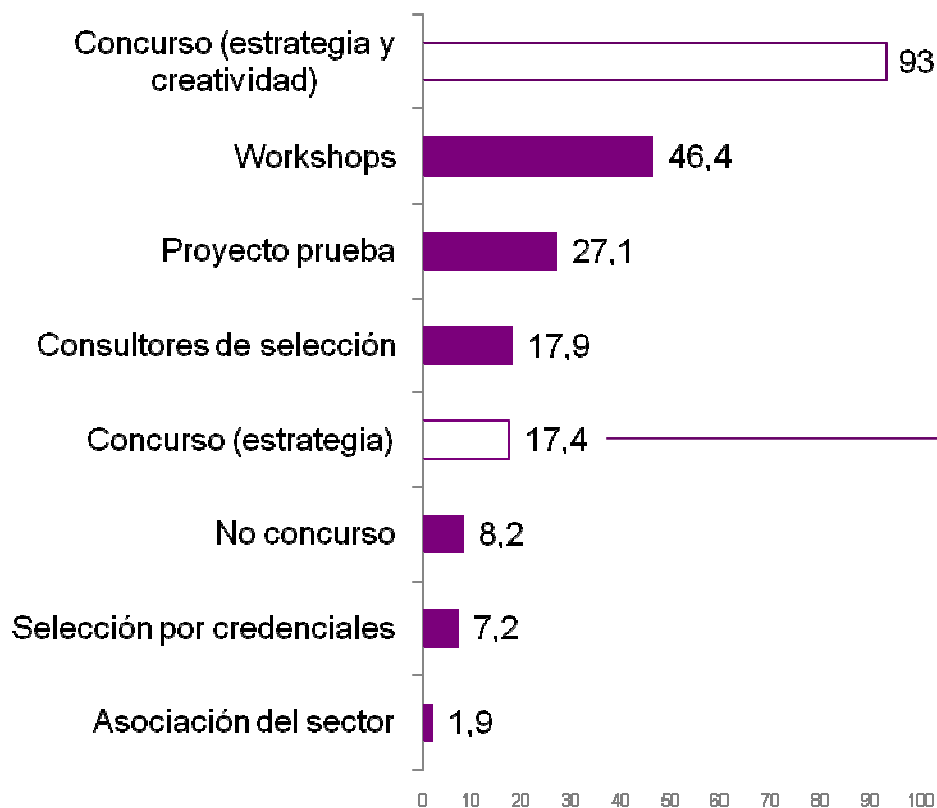
- When UK marketers think of the 'ideal' digital agency the most valuable attribute for them is a good understanding of new technologies. Creativity comes second. Therefore in digital having strengths in technology and creativity is key.
- Knowledge and experience, integration and strategic planning are the next most mentioned characteristics (by more than 15% of interviewees).

Media de menciones= 2.53

Base: 186 profesionales que dicen trabajar con agencias especialistas (digital)

# Selección de Agencia | Sistema de selección

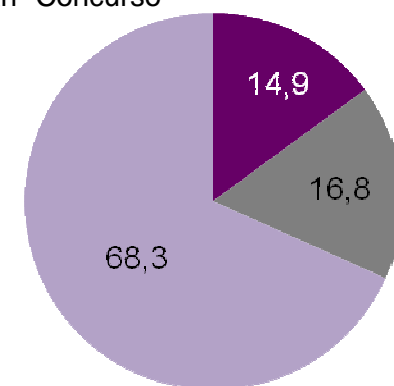
(%)



97.5% realiza concurso

Base: 202 profesionales que realizan "Concurso"

## ¿Remunera a agencias participantes?

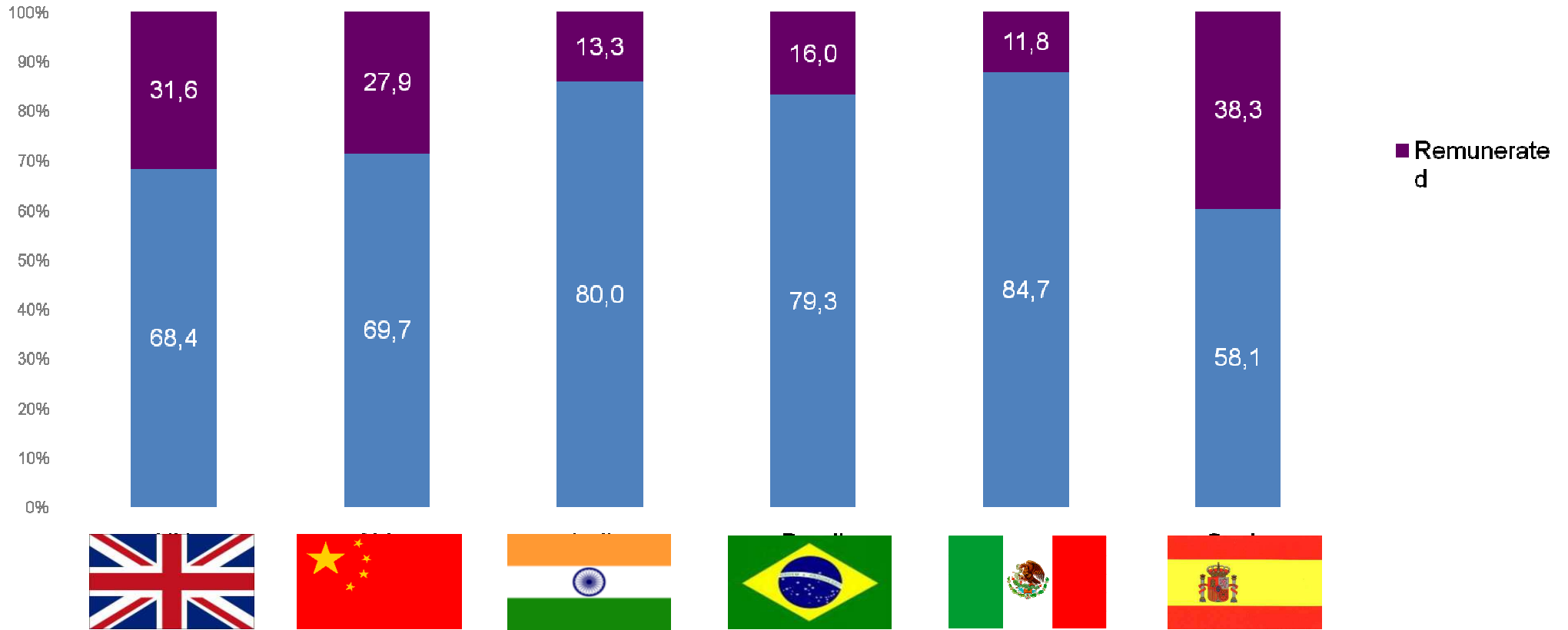


■ Si    ■ A veces    ■ No

Base: 207 profesionales entrevistados

# Agency Selection | Remuneration of pitches




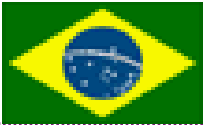


Data in %



Base: marketers interviewed in each country for agencyScope

## Relación Agencia-Cliente | Duración relación

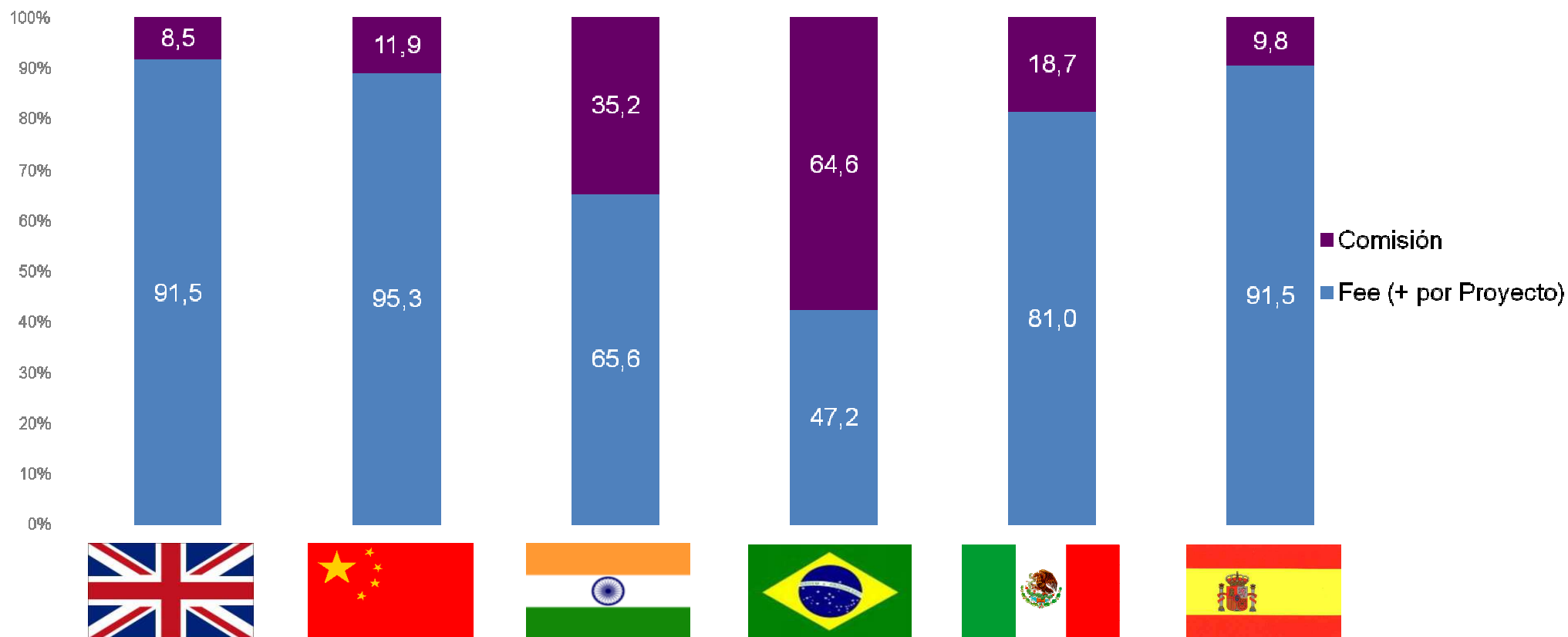
Número de años (agencias de publicidad)

		2012	2010	2008
	AGENCYSCOPE UK	6.1	--	--
	AGENCYSCOPE CHINA	3.4	2.7	2.5
	AGENCYSCOPE INDIA	--	3.6	--
	AGENCYSCOPE BRASIL	--	5.7	4.8
	AGENCYSCOPE MÉJICO	--	4.9	--
	AGENCYSCOPE ESPAÑA	--	4.8	4.3

Base: profesionales entrevistados en cada país

## Relación Agencia-Cliente | Remuneración (por países)

(%)



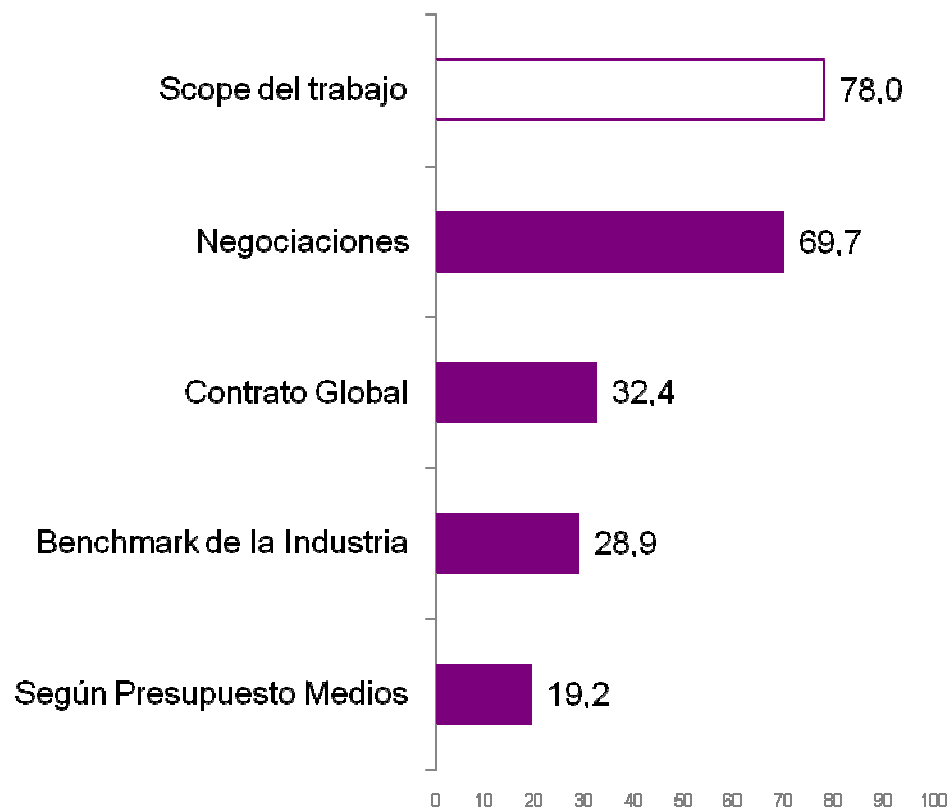
Base: profesionales entrevistados en cada país

Nota: múltiples opciones (Respuestas Fee+Comisión no incluidas)

# Relación Agencia-Cliente | Remuneración

(% cuentas)

## Criterios remuneración



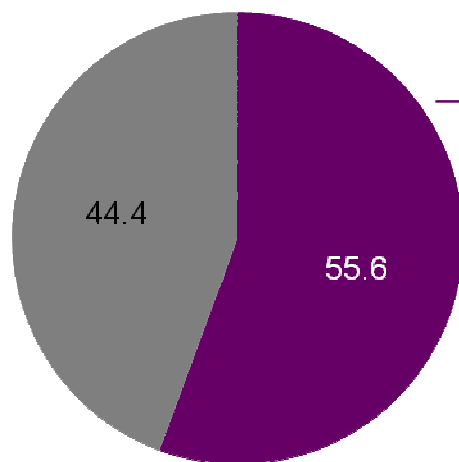
- 78% of accounts in the UK fix compensation based on scope of work.
- Nearly 70% fix compensation by specific negotiations with their agency.
- One third of compensations are fixed globally.
- And another third use industry benchmarks.
- Only 20% are still based on media spend.

Base: 660 cuentas analizadas (respuesta múltiple)

# Relación Agencia-Cliente | Remuneración variable

(% cuentas)

## ¿Existe remuneración variable?

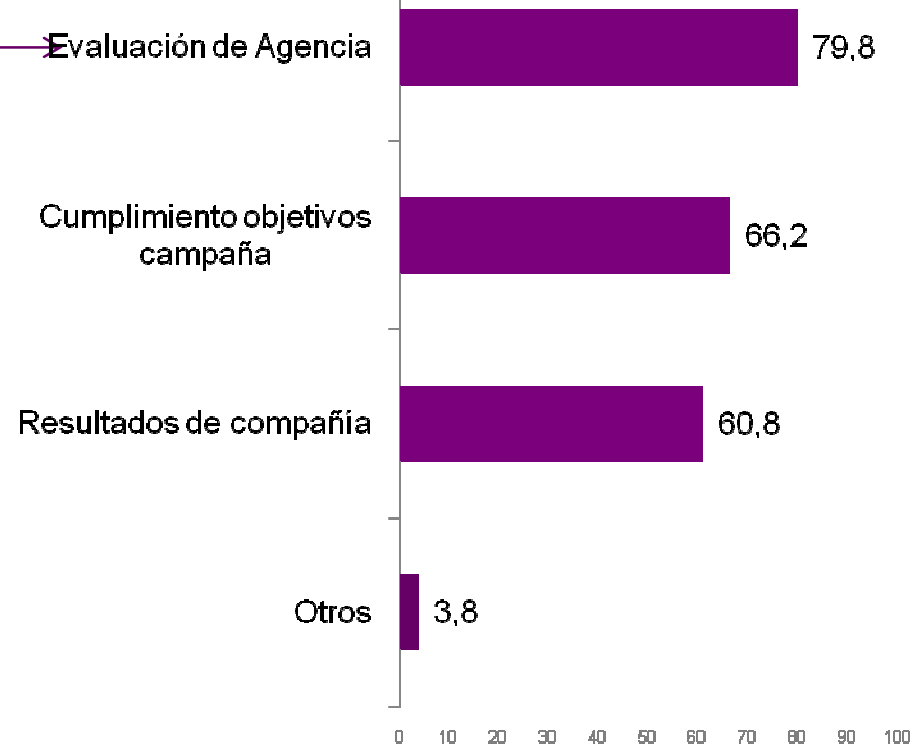


Base: 367 cuentas analizadas

- Sí
- No

56% of accounts in the UK pay an incentive to their agencies. The incentive system is based on a combination of variables (agency performance, advertising performance and client company results). In 80% of cases accounts use agency performance in the analysis.

## ¿Como se fija la remuneración variable?



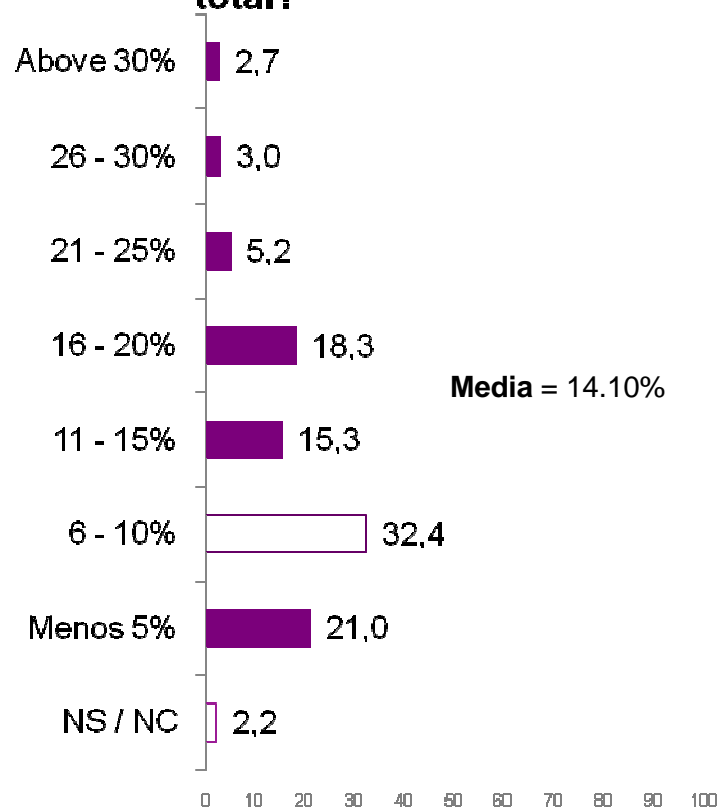
Base: 660 cuentas analizadas



# Relación Agencia-Cliente | Remuneración

(% cuentas)

## ¿Porcentaje importe variable sobre el total?

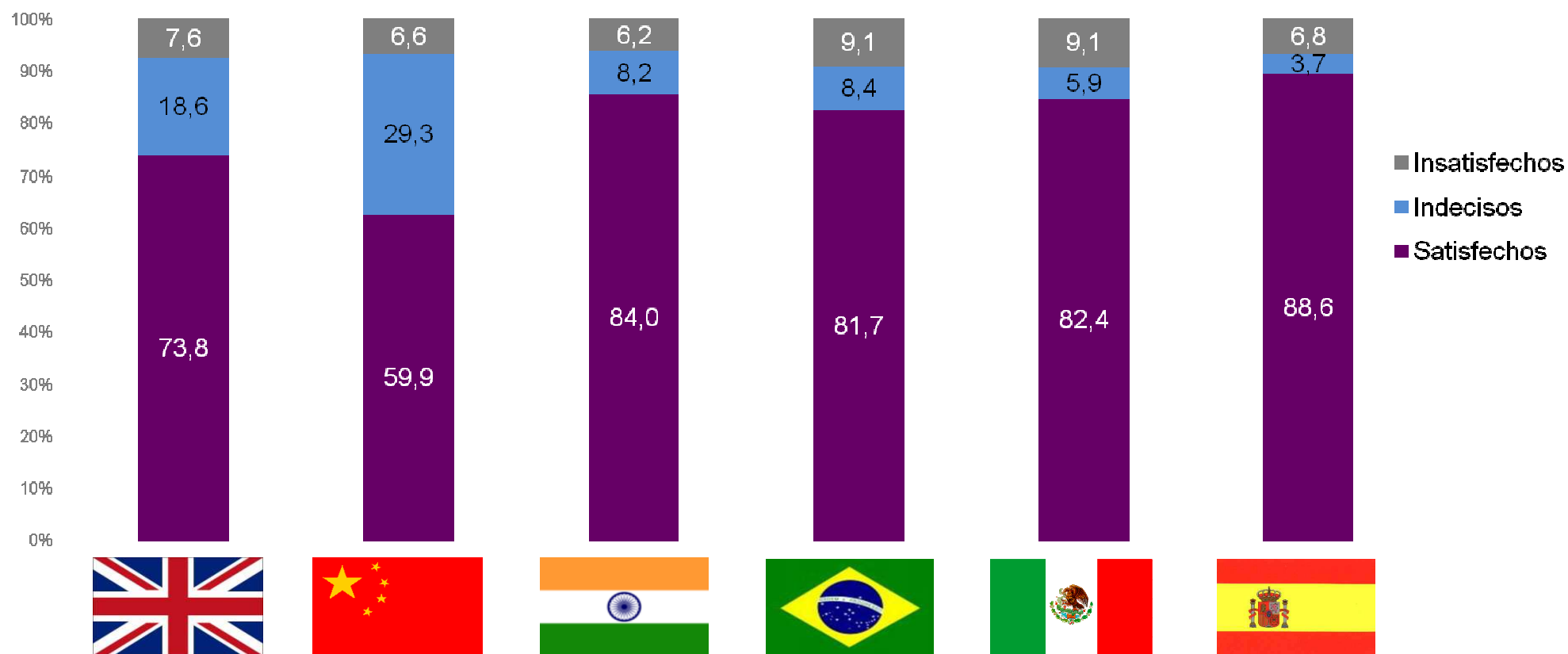


- As we have seen 56% of accounts in the UK pay incentive to their agency. We have asked to this accounts how much of the payment is bonus based and we get an average of **14%** (in most of the countries incentives are between 10 and 20%).
- Nearly 6% of accounts pay incentives above 25%.
- Most of accounts (53%) are below 10%.

Base: 367 cuentas con remuneración variable

## Cambio de Agencia | Nivel de satisfacción (por países)

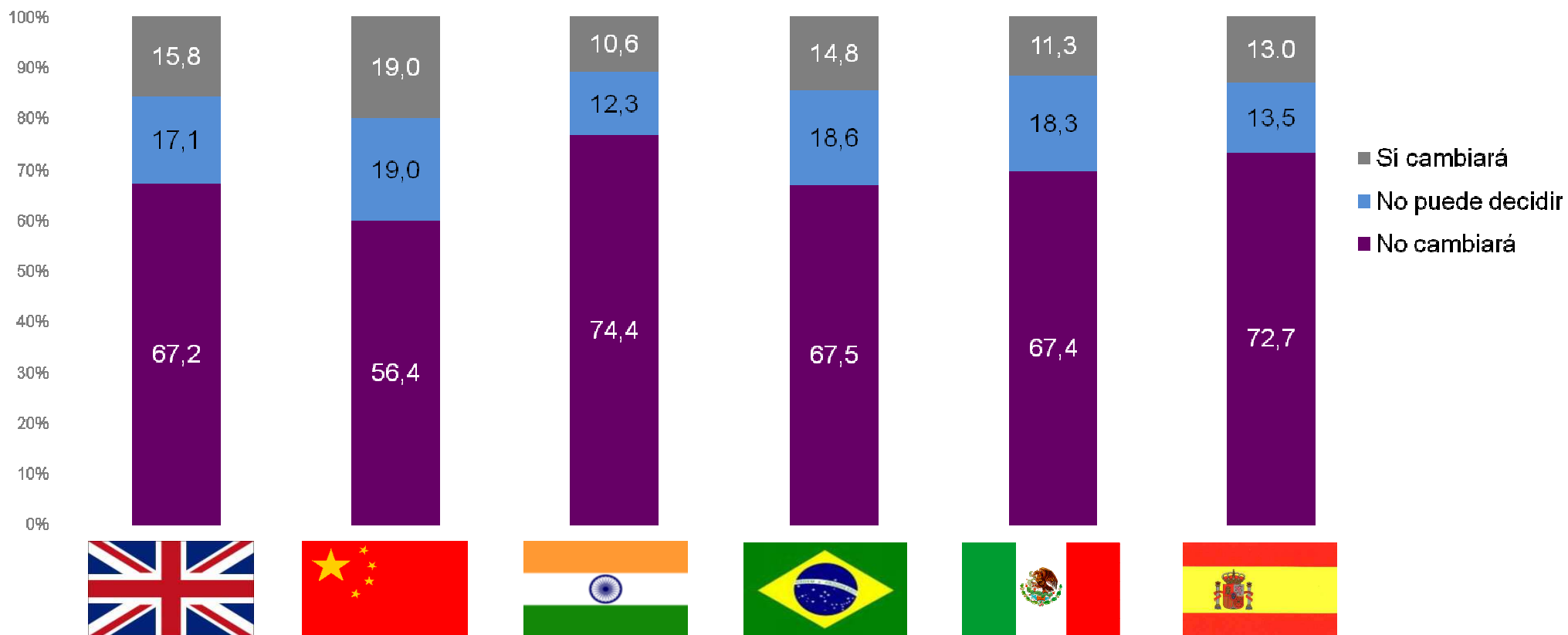
(%)



Base: cuentas analizadas por países (diferencias hasta 100% corresponden a respuestas NS / NC)

# Cambio de Agencia | Predisposición al cambio

(%)



Base: cuentas analizadas por países (diferencias hasta 100% corresponden a respuestas NS / NC)

# Agency Image Overview | High Profile Agency Professionals – Top 11

Data in mentions



## High Profile Agency Professionals

Name	Mentions
Rory Sutherland (Ogilvy)	17
John Hegarty (BBH)	14
James Murphy (Adam & Eve)	12
Trevor Beattie (BMB)	9
Andrew McGuinness (BMB)	7
Cilla Snowball (AMV BBDO)	7
Ben Kay (RKCR/Y&R)	5
Charlie Snow DLKW Lowe	5
Debbie Klein (WCRS)	5
Johnny Hornby (CHI & Partners)	5
Mark Cridge (Glue Isobar)	5

Base: 207 interviews

# Agency Image Overview | High Profile Campaigns

Data in mentions



High Profile Campaigns		
Ranking	Brands	Mentions
1 <sup>st</sup>	John Lewis	96
2 <sup>nd</sup>	Comparethemarket.com	42
3 <sup>rd</sup>	Virgin Atlantic	37
4 <sup>th</sup>	VW	27
5 <sup>th</sup>	Yeo Valley	21
6 <sup>th</sup>	Old Spice	19
7 <sup>th</sup>	Nike	18
8 <sup>th</sup>	M&S	17
9 <sup>th</sup>	Lynx	16
10 <sup>th</sup>	Virgin	15
11 <sup>th</sup>	Cadbury / O2	14
13 <sup>th</sup>	Apple	13
14 <sup>th</sup>	British Airways	12
15 <sup>th</sup>	Honda / Waitrose	11

Base: 207 interviews

# Agency Image Overview | Most Respected Companies

Data in mentions

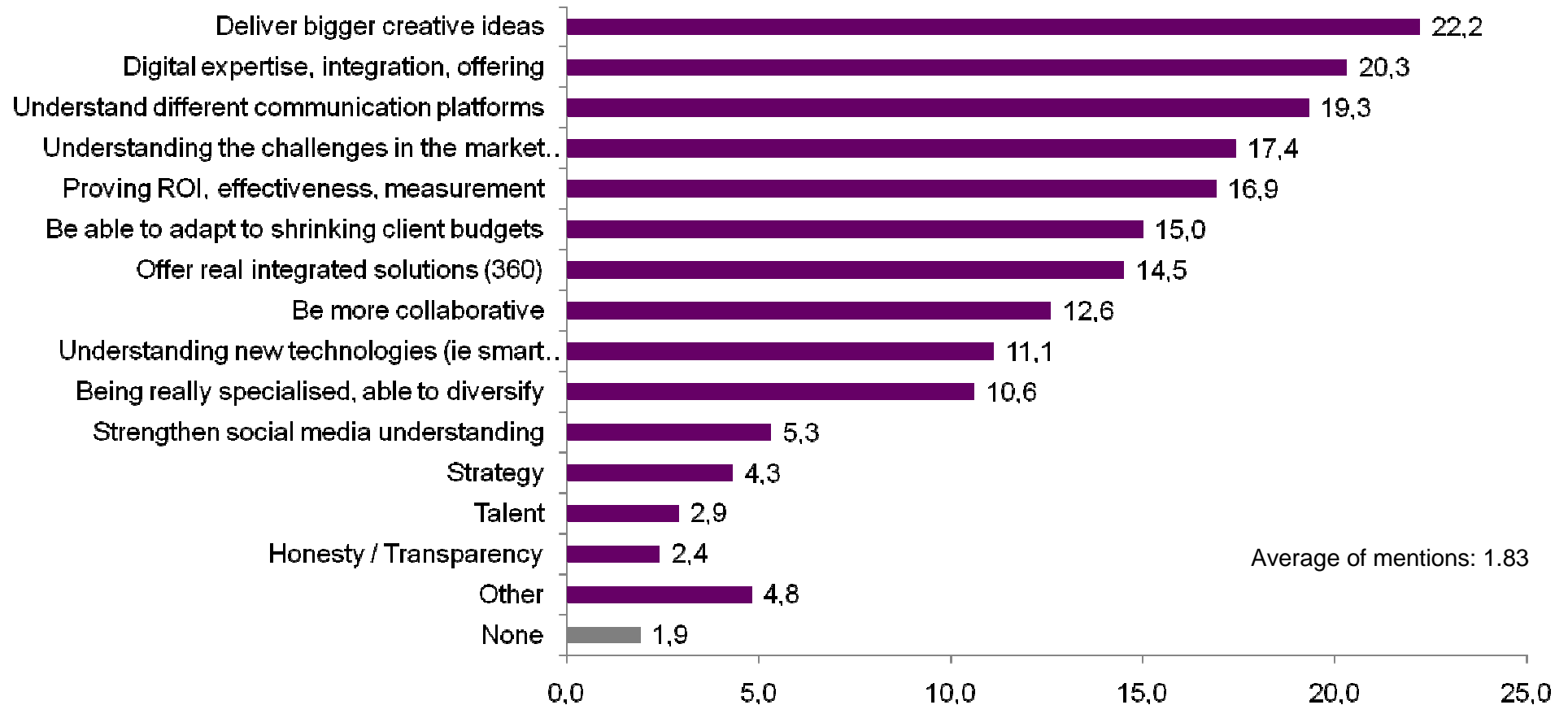


High Respected Companies		
Ranking	Brands	Mentions
1 <sup>st</sup>	John Lewis	65
2 <sup>nd</sup>	Apple	58
3 <sup>rd</sup>	Virgin	34
4 <sup>th</sup>	Nike	24
5 <sup>th</sup>	P&G	24
6 <sup>th</sup>	Innocent	20
7 <sup>th</sup>	Coca-Cola	17
8 <sup>th</sup>	O2	16
9 <sup>th</sup>	Unilever	14
10 <sup>th</sup>	Tesco Virgin Atlantic VW	10
13 <sup>th</sup>	Audi Honda Waitrose	9
16 <sup>th</sup>	M&S	8
17 <sup>th</sup>	Comparethemarket.com Guinness Yeo Valley	7

Base: 207 interviews

# Prospective Question | Biggest Challenges 2012

Data in %



Base: 207 professionals interviewed



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**César Vacchiano** is President & CEO at Grupo Consultores. Based in Madrid, he has been conducting this Study in Europe, Asia and Latin America for 22 years, and is now bringing his expertise to the UK. agencyScope analyses client-agency relationships in more than 15 markets (including Brazil, China, India, ...).

[cvacchiano@grupoconsultores.com](mailto:cvacchiano@grupoconsultores.com)



**Juliet Blackburn** is Managing Director at Grupo Consultores UK. Built on 9 years leading client searches for digital and comms agencies at AAR and 11 years client experience at Skype, BT and Coca-Cola, Juliet brings as wealth of industry knowledge and consultancy.

[jblackburn@gc-uk.co.uk](mailto:jblackburn@gc-uk.co.uk)



**Fred Messina** is International Research Manager at Grupo Consultores. Fred has been working at GC for the last 10 years and is mainly responsible for emerging markets such as China, Brazil and Mexico.

[fmessina@gc-uk.co.uk](mailto:fmessina@gc-uk.co.uk)



# Muchas Gracias

