

Agency Scope UK

Second Edition, 2015

Insights into the trends of the UK Creative Communications Industry and the perceptions and performance of creative agencies

Confidential Report prepared for:

London | September, 2015

SCOPEN

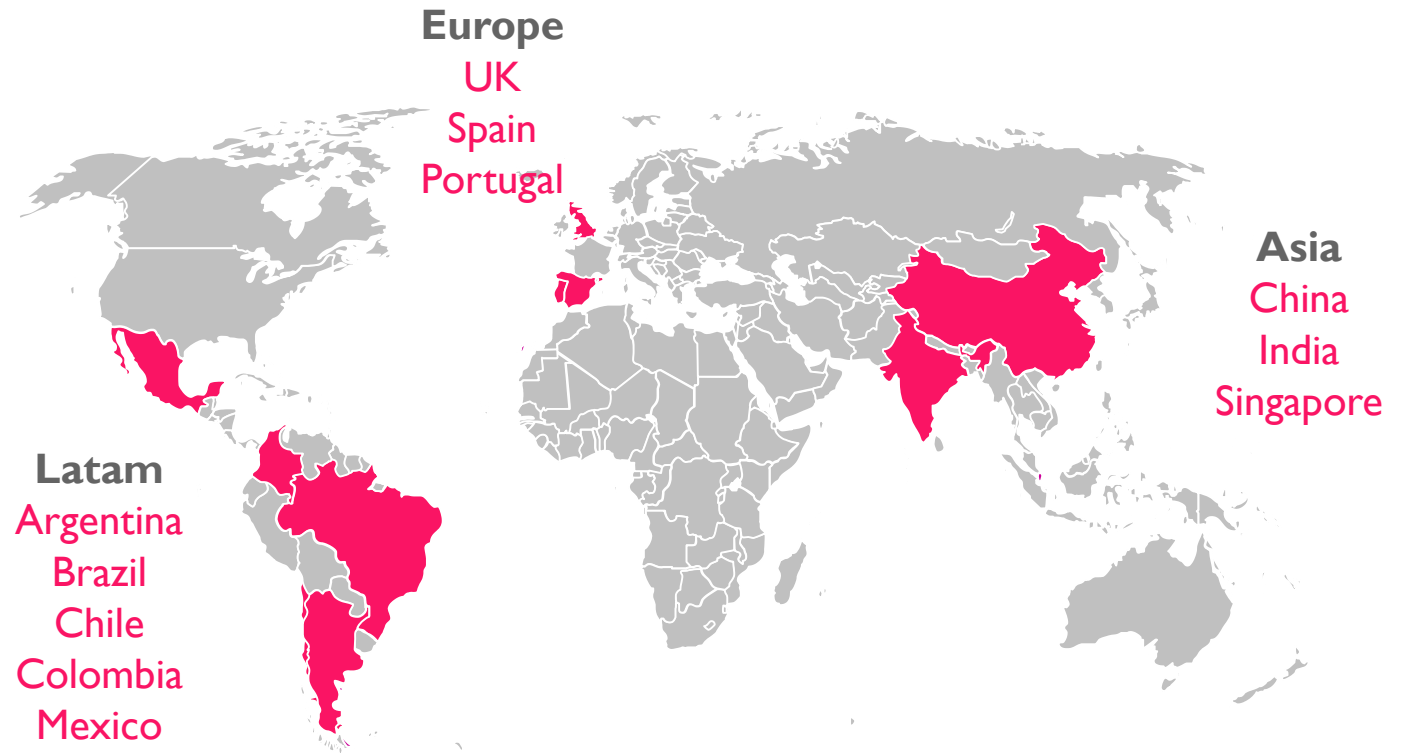
Department of Research & Studies

Introduction | SCOPEN – WHO WE ARE

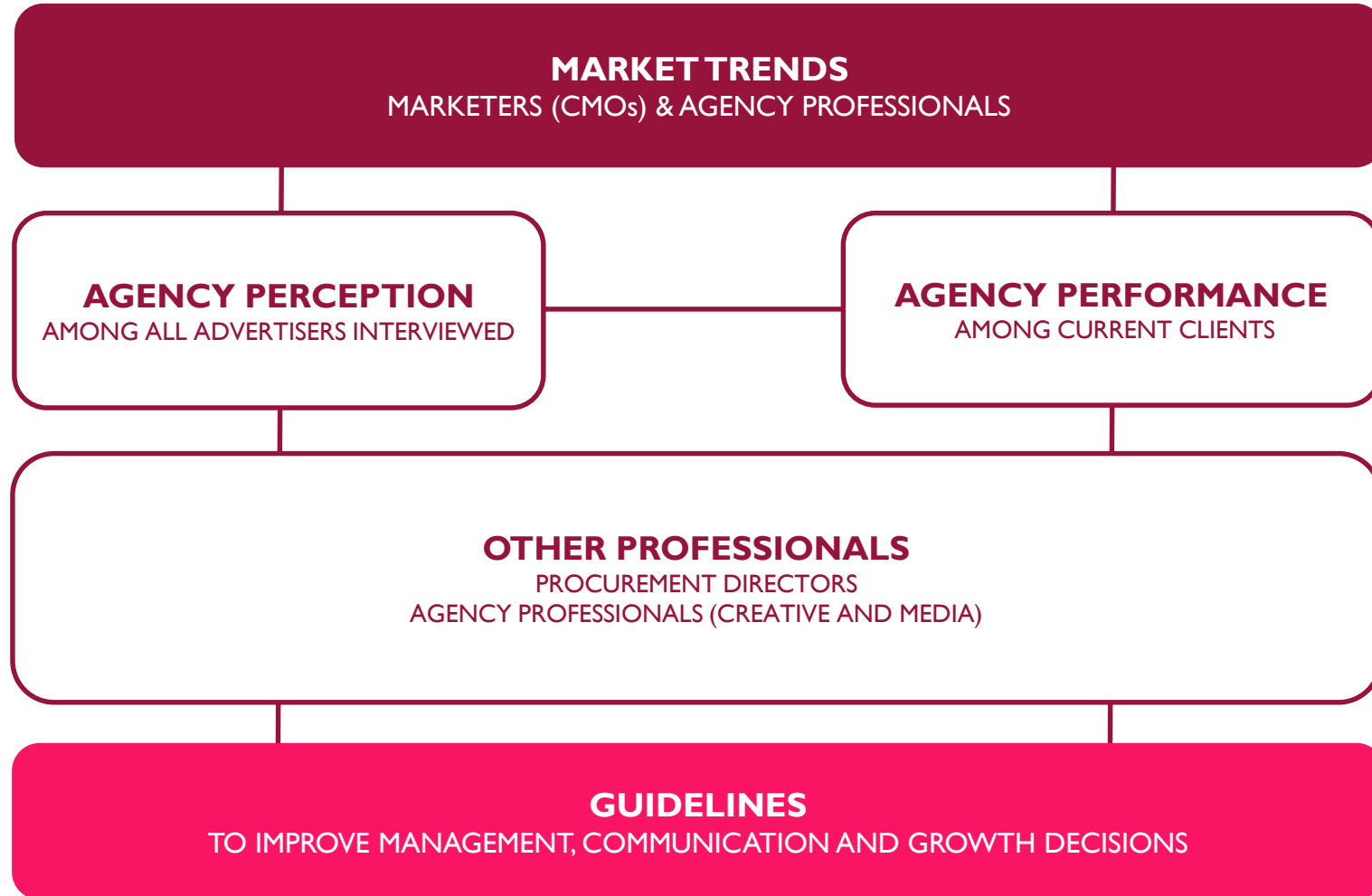
SCOPEN offers **Strategic Consulting** for the communications industry. We provide specific products based on unique and solid **research** for **Advertisers, Media** and **Creative Agencies**.

We are a team of **over 50 professionals** who combine knowledge, experience and vision to advise, recommend and provide value to our clients.

Established in 1990, currently we are in **11 markets** and have a presence in **3 continents**.



Introduction | THE WAY AGENCY SCOPE WORKS



Methodology | SAMPLE

DATA IN MENTIONS

TOTAL SAMPLE

MARKETERS SAMPLE (NUMBER OF INTERVIEWS)	2012	2015
CREATIVE AGENCIES	207	160
Integrated Agencies	98	92
Advertising Agencies		106
Marketing Services Agencies	186	48
Digital Agencies		45
MEDIA AGENCIES	--	139
PROCUREMENT DIRECTORS	11	22
TOTAL MARKETERS	218	321
OTHER PROFESSIONALS	2012	2015
Agency professionals	71	91
TOTAL PROFESSIONALS	80	91

212*

412

MARKETERS SAMPLE (RELATIONSHIPS)	2012	2015
CREATIVE AGENCIES	660	415
Integrated Agencies	--	129
Advertising Agencies	347	149
Marketing Services Agencies	179	56
Digital Agencies	134	51
MEDIA AGENCIES	--	170
TOTAL CLIENT-AGENCY RELATIONSHIPS	660	585

* 212 individuals (some respond to both questionnaires: media and creative)

Methodology | SAMPLE (156 COMPANIES INTERVIEWED. 130 (84%) AGREED TO BE INCLUDED AS PARTICIPANTS)

DATA IN MENTIONS

TOTAL SAMPLE



SCOPEN 5

AGENCY SCOPE

Sample profile | COMPANIES AND PROFESSIONALS INTERVIEWED PARTICULARS

DATA IN %

TOTAL SAMPLE

	2012	2015		2012	2015		2012	2015
PRESIDENT, CEO, GENERAL MANAGER	1.9	1.1	AUTOMOTIVE	7.7	6.8	PUBLIC SERVICE	2.4	4.7
VP MARKETING / CMO	3.4	2.1	BEAUTY, COSMETICS AND PERSONAL CARE	3.9	4.2	RETAIL / APPAREL	8.7	6.3
DIRECTOR (MARKETING, ADVERTISING,, DIGITAL)	48.4	45.3	BEVERAGES	5.3	3.7	TELECOMS & .COM	9.2	7.9
HEAD (BRAND, COMMUNICATIONS, STRATEGY)	19.8	23.2	CULTURE, SCHOOLS, MOVIES & MEDIA	2.4	9.5	TRAVEL / TOURISM	6.8	8.9
GLOBAL HEAD (BRAND/ ADVERTISING)	4.3	9.5	ENERGY	4.8	1.6	OTHER SECTOR	12.1	4.2
MANAGER (ADVERTISING, MARKETING, BRAND, CRM)	19.8	18.4	FAST MOVING CONSUMER GOODS (FMCG)	1.4	3.7			
OTHER	2.4	0.5	FINANCE & INSURANCE	14.5	14.7	MALE	57.0	55.3
			FOOD PRODUCTS	8.2	8.4	FEMALE	43.0	44.7
GREATER LONDON	64.3	50.5	FUEL AND OILS	3.9	4.2			
SOUTH	17.9	17.9	GAMING / LOTTERY	--	1.6	SENIORITY (COMPANY) AVERAGE OF YEARS	6.24	6.56
NORTH	6.8	7.4	HEALTH	6.3	1.1	SENIORITY (ROLE) AVERAGE OF YEARS	2.58	2.84
EAST	5.3	3.7	HOUSEHOLD FURNISHINGS AND APPLIANCES	1.0	5.3			
MIDLANDS	2.4	14.2	HOUSEHOLD PRODUCTS	2.4	0.5	MULTINATIONAL BUSINESS	77.3	72.1
SCOTLAND	1.9	3.2	OFFICE MACHINES, FURNITURE & SUPPLIES	0.5	2.1	LOCAL BUSINESS / BRAND	16.4	18.9
INTERNATIONAL	1.4	3.2	PROPERTY	0.5	0.5	GOVERNMENT ORGANIZATION	4.3	4.7
						NGO / CHARITY	2.0	4.2
MARKETERS INTERVIEWED	207	212	MARKETERS INTERVIEWED	207	212	MARKETERS INTERVIEWED	207	212

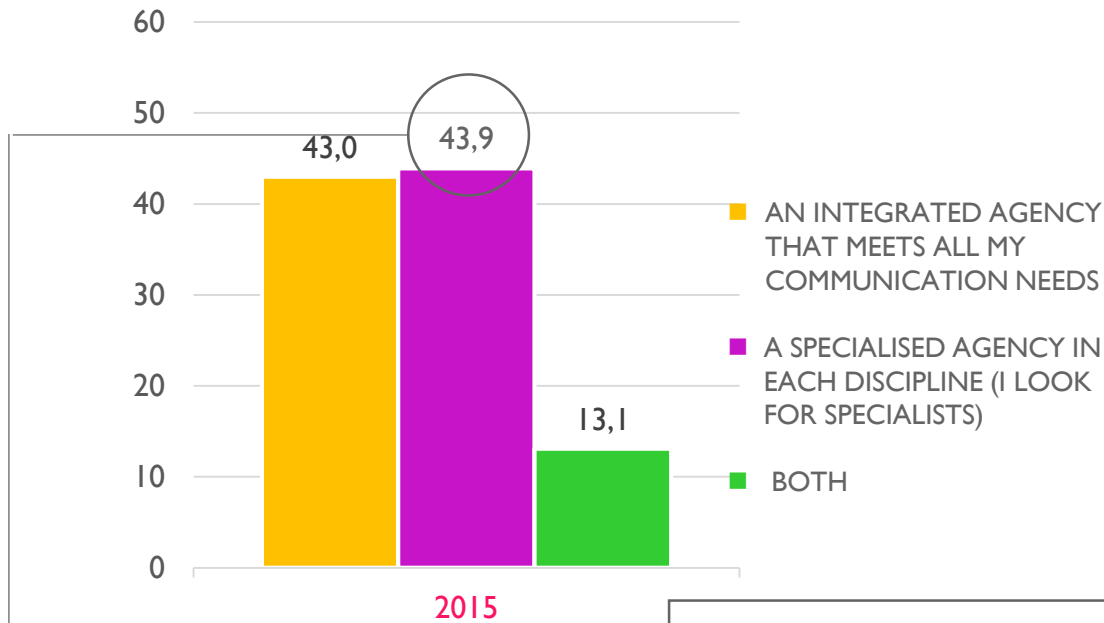
■/ ■ Indicates differences between 2015 and 2012 statistically significant (positive/negative) at 95% level of significance (p=q=0.5)

Sample profile | WAY OF WORKING WITH AGENCIES (INTEGRATION vs. SPECIALISATION)

DATA IN %

CREATIVE AGENCIES

WHAT KIND OF AGENCY ARE YOU CURRENTLY WORKING WITH?



WHAT SPECIALISATION?

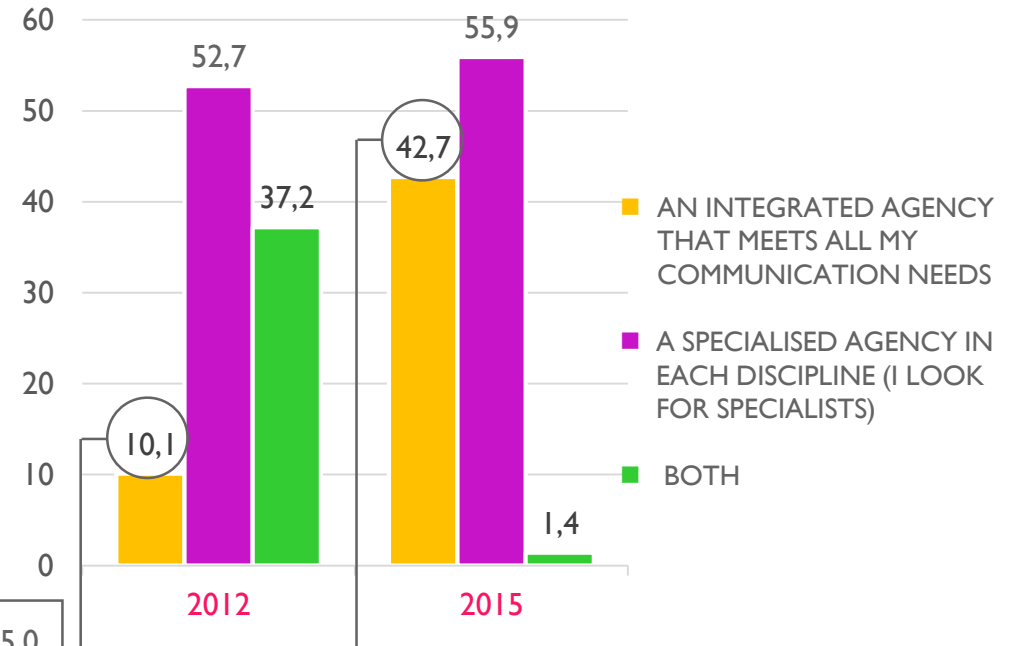
RESPONDENTS 2015 (63)

Only Advertising	25.0
Only Marketing Services	6.9
Only Digital	25.9
Advertising + Marketing Services	15.0
Advertising + Digital	82.4
Marketing Services + Digital	33.3

RESPONDENTS 2015 (143)



IF IT WERE YOUR DECISION, WOULD YOU PREFER TO WORK WITH?



+32.6 pp.

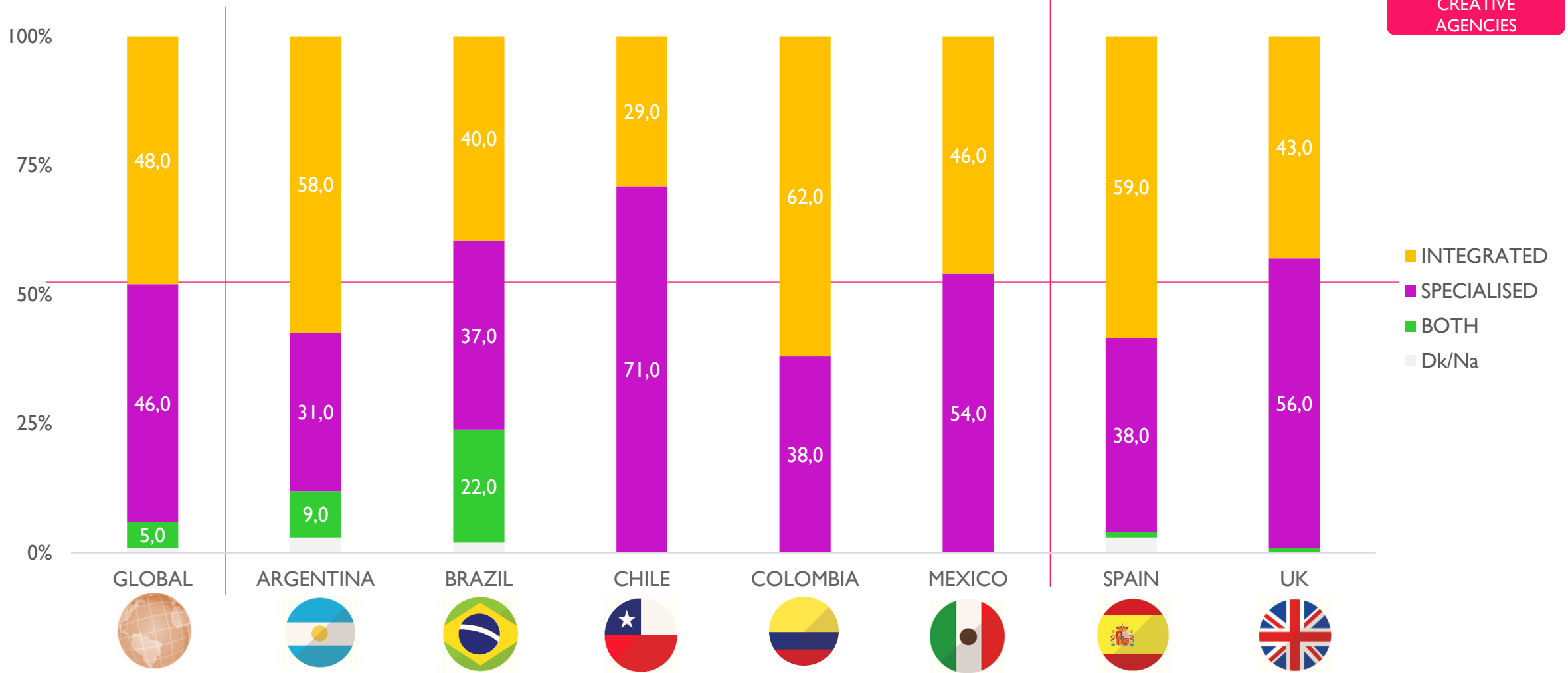


UK 2015

Sample profile | IF IT WERE YOUR DECISION, WOULD YOU PREFER TO WORK WITH?

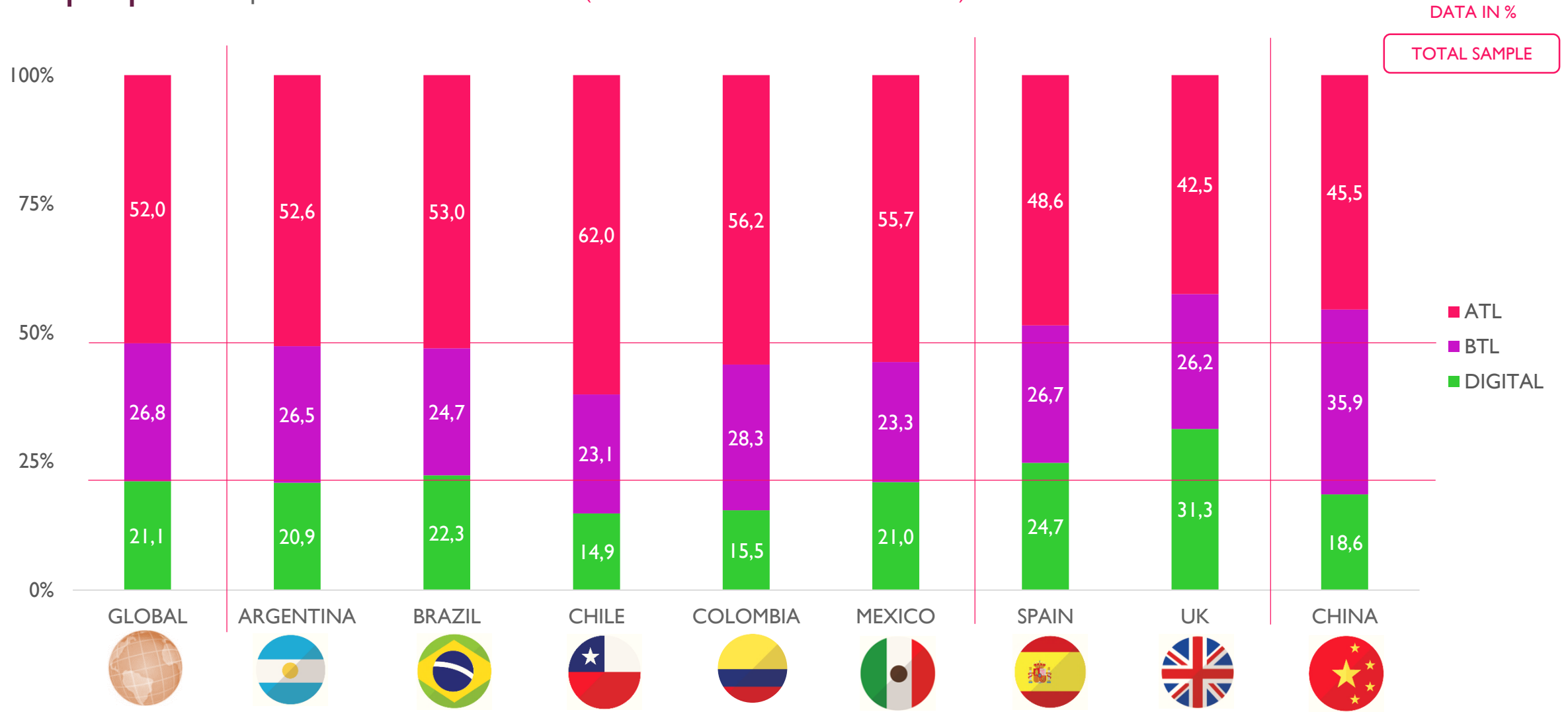
DATA IN %

CREATIVE AGENCIES



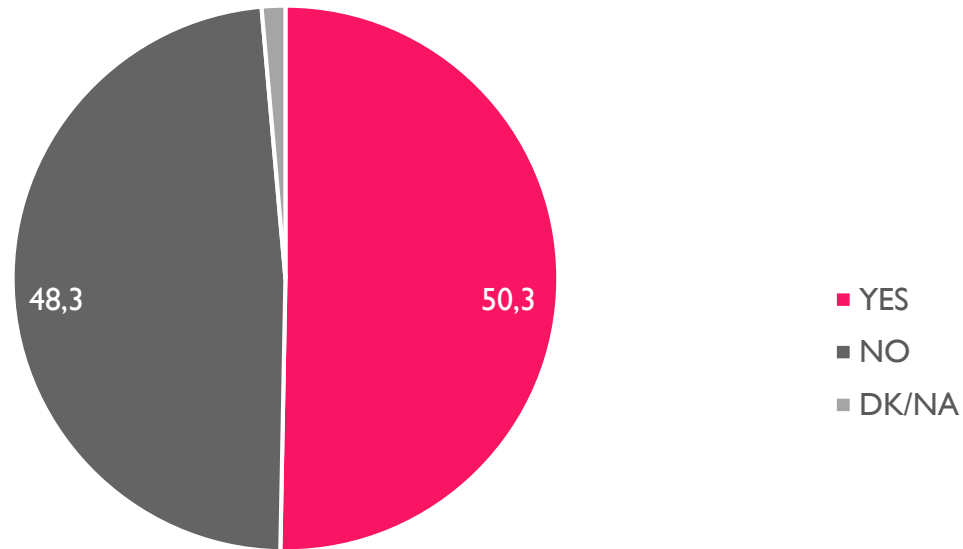
RESPONDENTS ARGENTINA-BRAZIL-CHILE-COLOMBIA-SPAIN-CHINA (DATA FROM 2014) MEXICO-UK (DATA FROM 2015)

Sample profile | MARKETING BUDGET (SPLIT BETWEEN ATL-BTL-DIGITAL)



MARKETERS INTERVIEWED ARGENTINA-BRAZIL-CHILE-COLOMBIA-SPAIN-CHINA (DATA FROM 2014) MEXICO-UK (DATA FROM 2015)

DOES YOUR MARKETING TEAM DEVELOP CREATIVITY IN HOUSE?



When interviewees mention YES they are implying they develop some kind of creativity in-house (labelling, packaging, direct marketing actions, promotions ...).

In all cases interviewees work with creative agencies to solve their Communications needs. This figure simply reflects the trend of marketers to be more involved in the creative process and trying to solve some of their needs in-house.

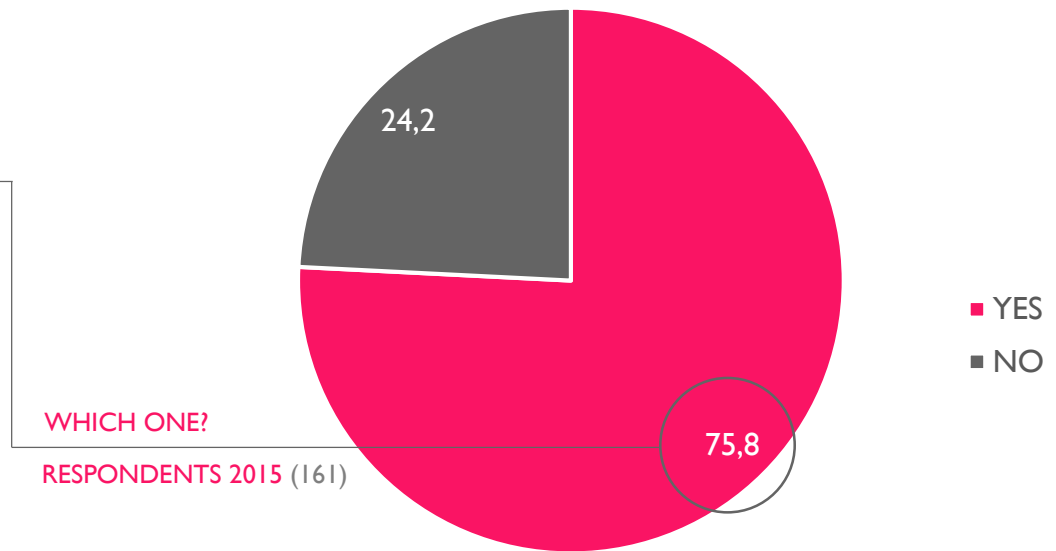
Sample profile | WAY OF WORKING WITH AGENCIES

DATA IN %

TOTAL SAMPLE

AMV BBDO	7.3
McCANN LONDON	7.3
ADAM&EVEDDB	6.3
McCANN MANCHESTER	6.3
OGILVY&MATHER	6.3
VCCP	6.3
CHI & PARTNERS	3.1
J.WALTER THOMPSON	3.1
M&C SAATCHI	3.1
RKCR/Y&R	3.1
Other	22.4
None	10.4

DO YOU HAVE AN AGENCY OF RECORD?

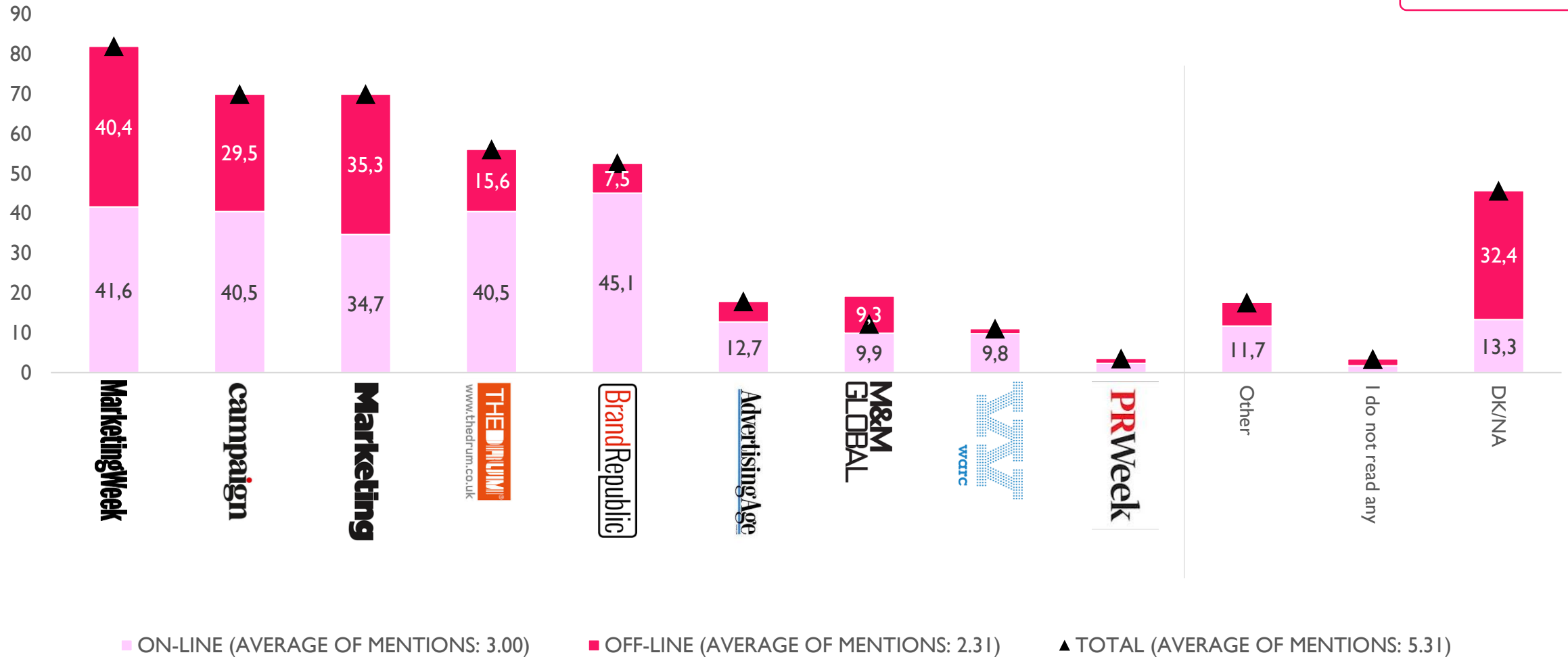


MARKETERS INTERVIEWED 2015 (212)

Sample profile | PUBLICATIONS (MOST WIDELY READ AND VALUED)

DATA IN %

TOTAL SAMPLE

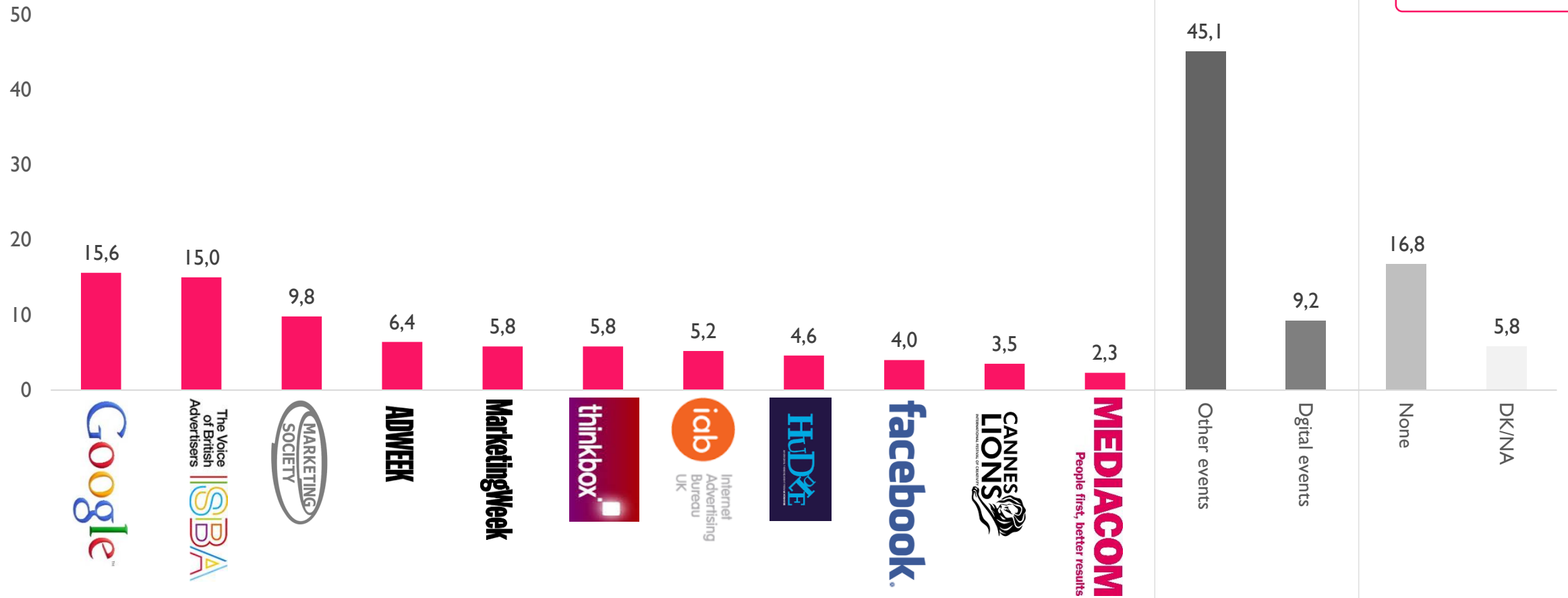


RESPONDENTS 2015 (173)

Sample profile | EVENTS, SEMINARS & CONFERENCES (ATTENDED IN THE LAST YEAR)

DATA IN %

TOTAL SAMPLE

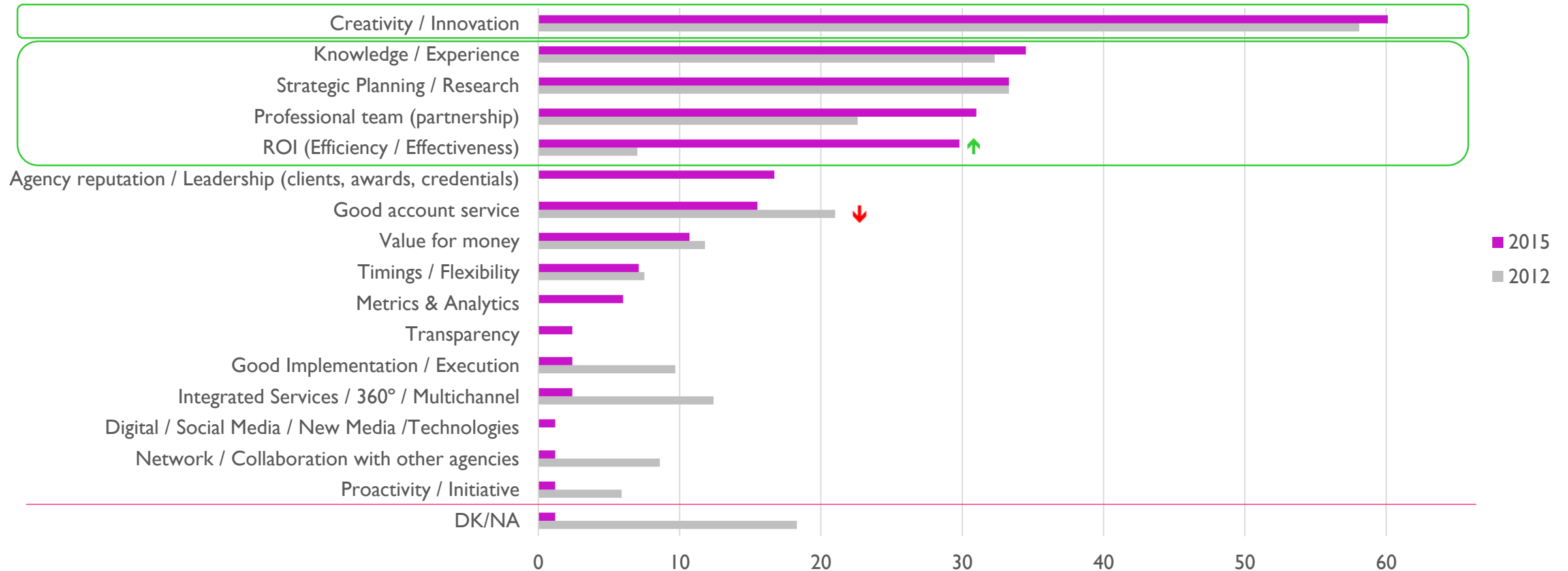


RESPONDENTS 2015 (173)

Agency Selection | CHARACTERISTICS OF THE 'IDEAL' ADVERTISING AGENCY

DATA IN %

ADVERTISING AGENCIES



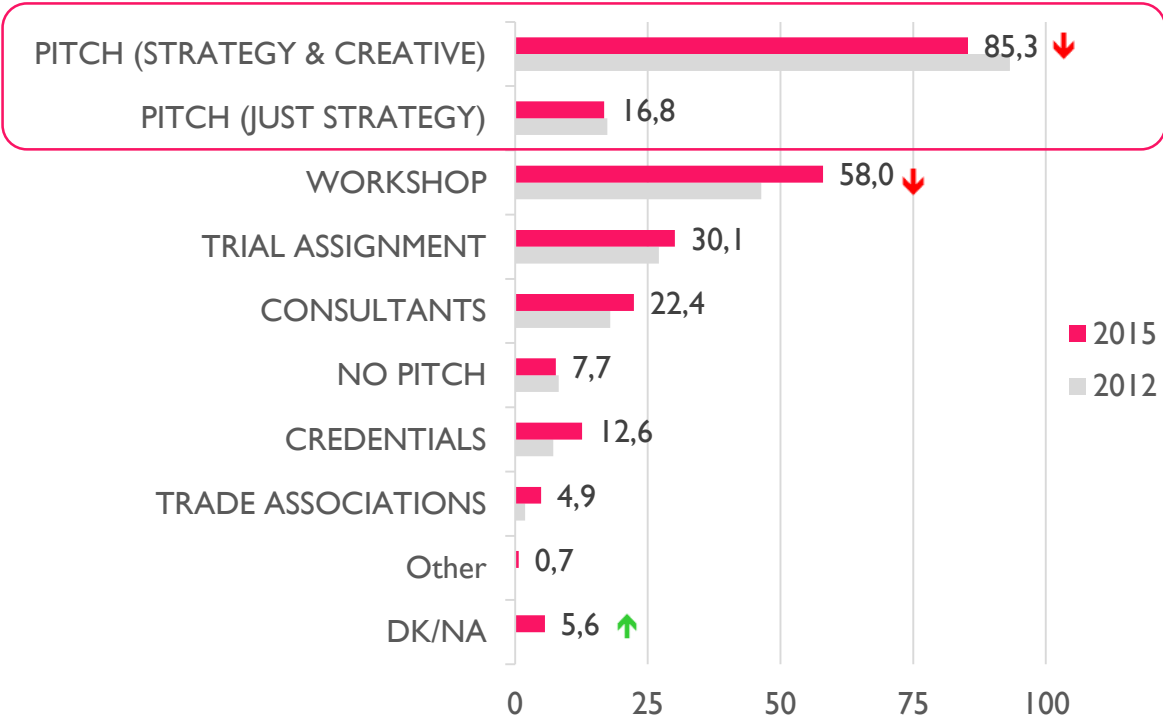
RESPONDENTS 2012 (186) 2015 (84)

Agency Selection | METHODS (FOR SELECTING A NEW AGENCY)

DATA IN %

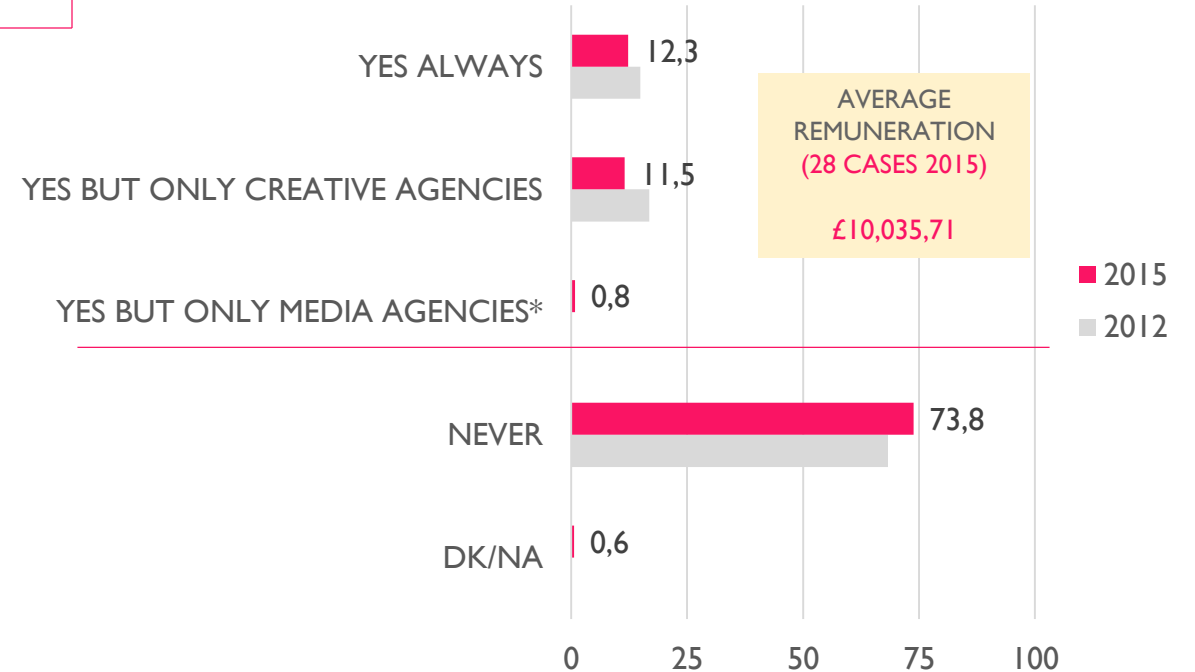
CREATIVE AGENCIES

WHAT SELECTION METHOD DO YOU USE TO APPOINT A NEW AGENCY?



DO YOU PAY CREATIVE AND MEDIA AGENCIES PARTICIPATING IN A PITCH?

RESPONDENTS 130



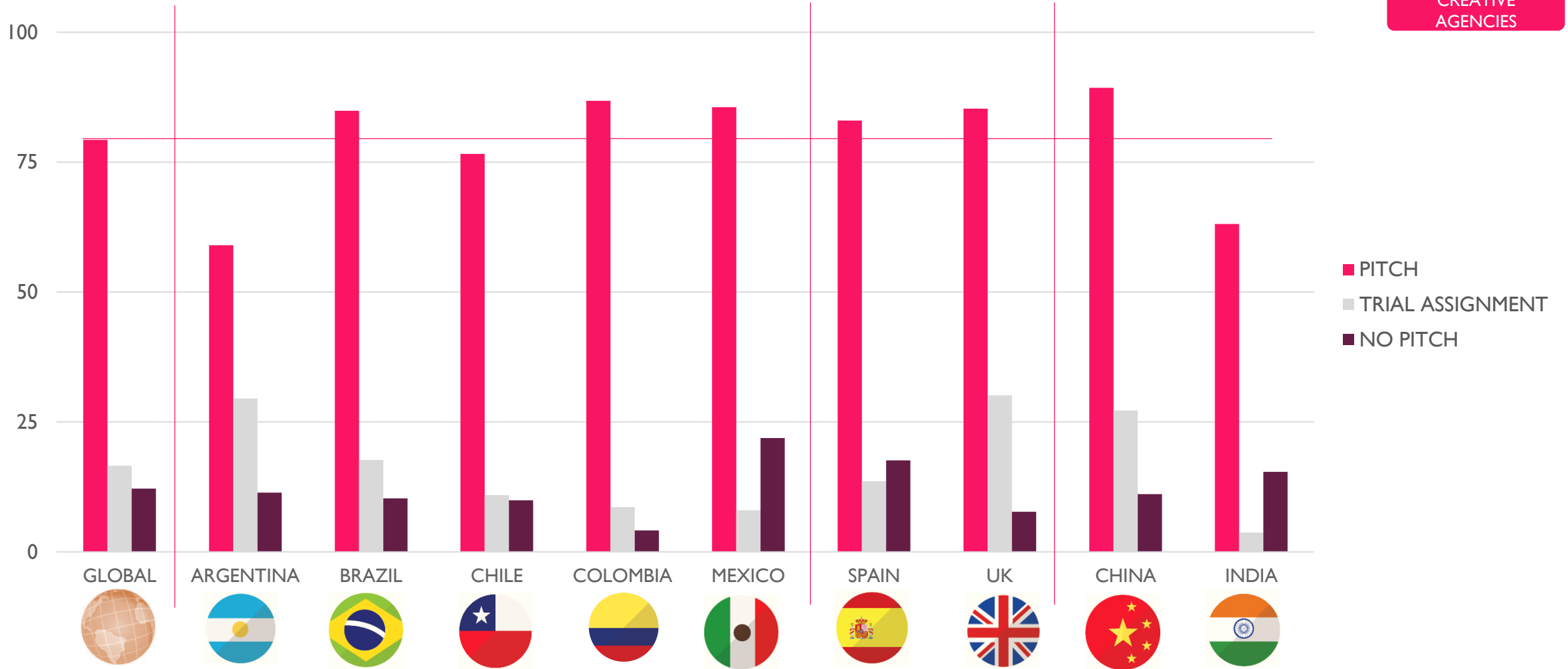
RESPONDENTS 2012 (207) - 2015 (143)

↑ / ↓ Indicates difference between 2015 and 2012 statistically significant positive/negative at 95% level of significance (p=q=0.5)

Agency Selection | METHODS (FOR SELECTING A NEW AGENCY)

DATA IN %

CREATIVE AGENCIES



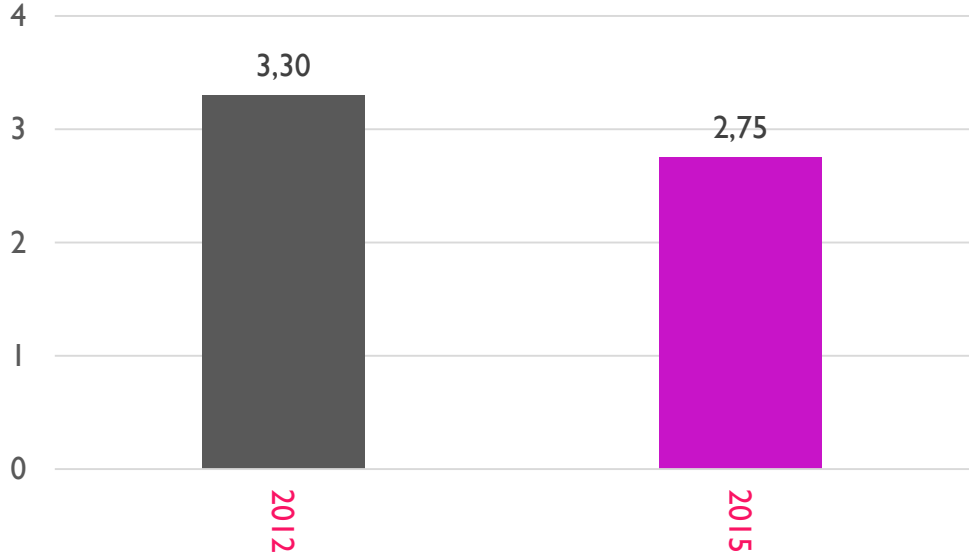
RESPONDENTS ARGENTINA-BRAZIL-CHILE-COLOMBIA-SPAIN-CHINA (DATA FROM 2014) MEXICO-UK (DATA FROM 2015)

Client-Agency Relationship | NUMBER OF CURRENT AGENCIES

DATA IN AVERAGES

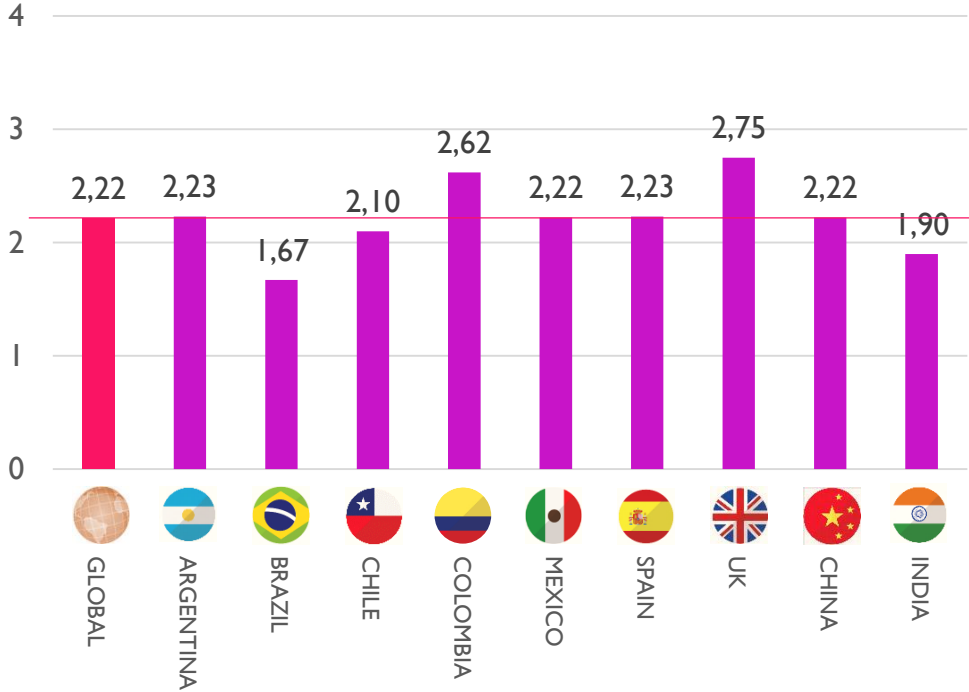
ADVERTISING AGENCIES

NUMBER OF AGENCIES



RESPONDENTS 2012 (207) 2015 (141)

NUMBER OF AGENCIES



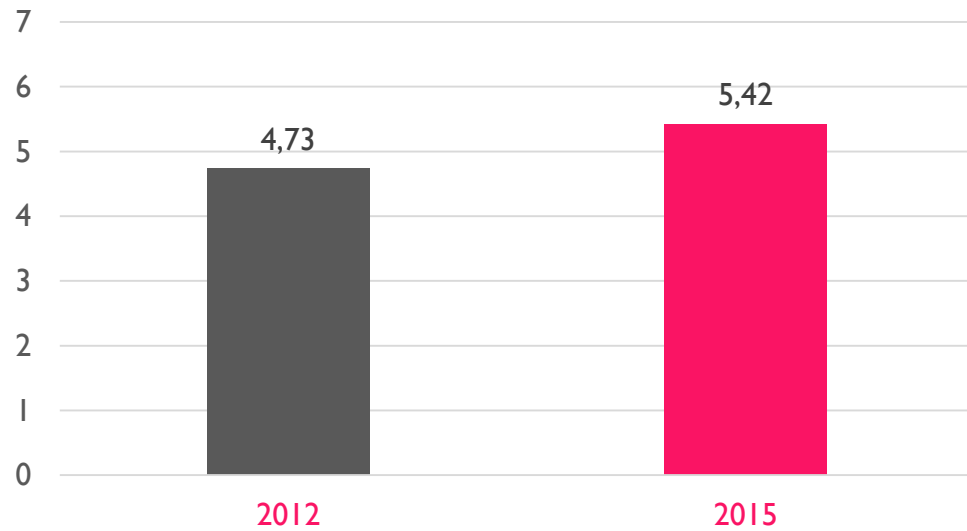
RESPONDENTS ARGENTINA-BRAZIL-CHILE-COLOMBIA-SPAIN-CHINA (2014), INDIA (2012), MEXICO & UK (2015)

Client-Agency Relationship | LENGTH OF THE RELATIONSHIP

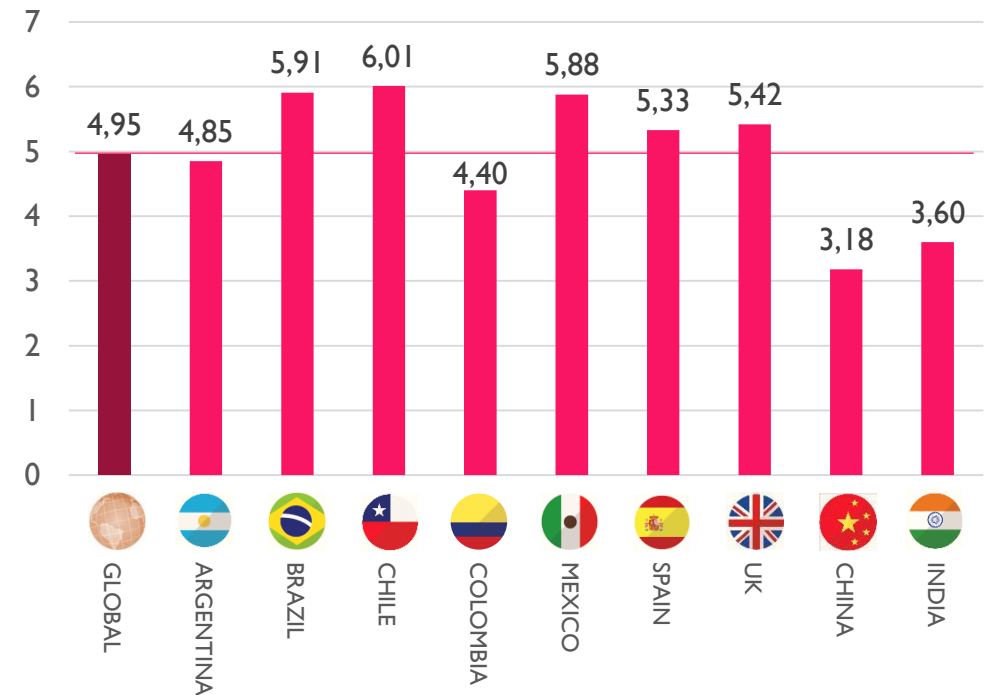
DATA IN AVERAGES

CREATIVE AGENCIES

LENGTH OF THE RELATIONSHIP (AVERAGE YEARS)



LENGTH OF THE RELATIONSHIP (AVERAGE YEARS)

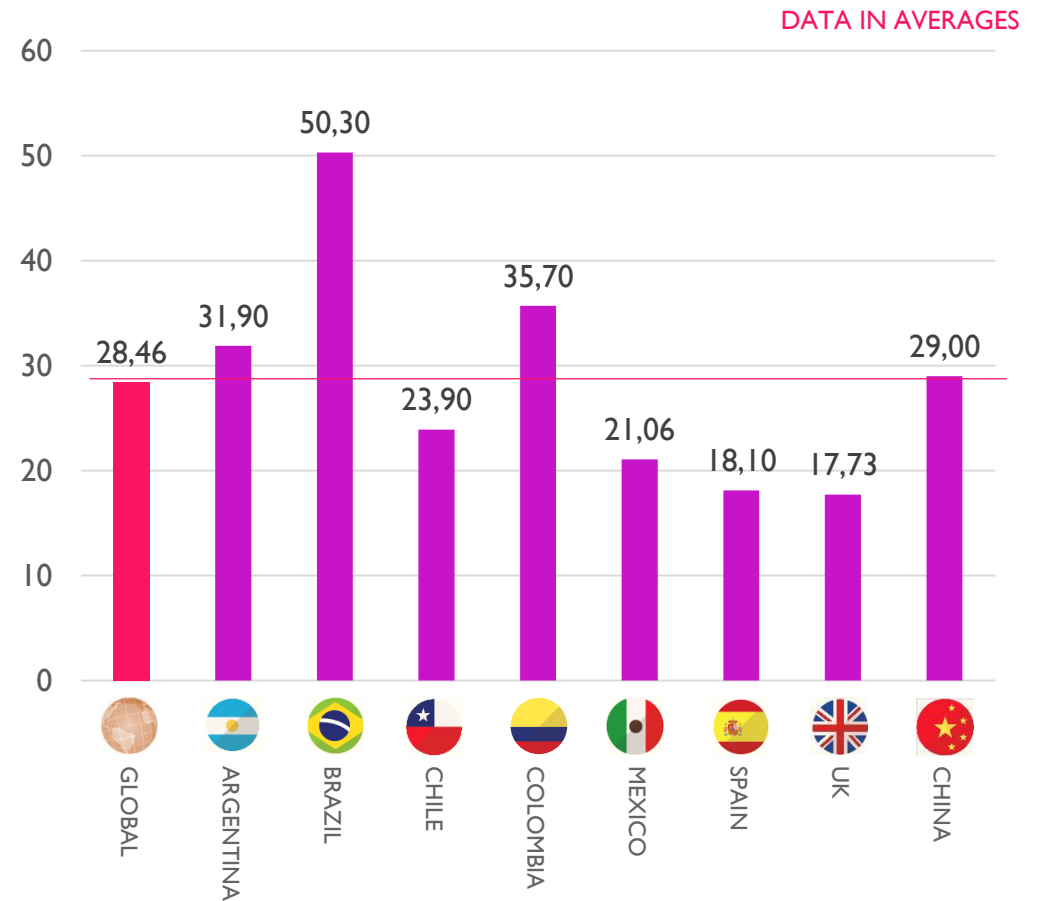
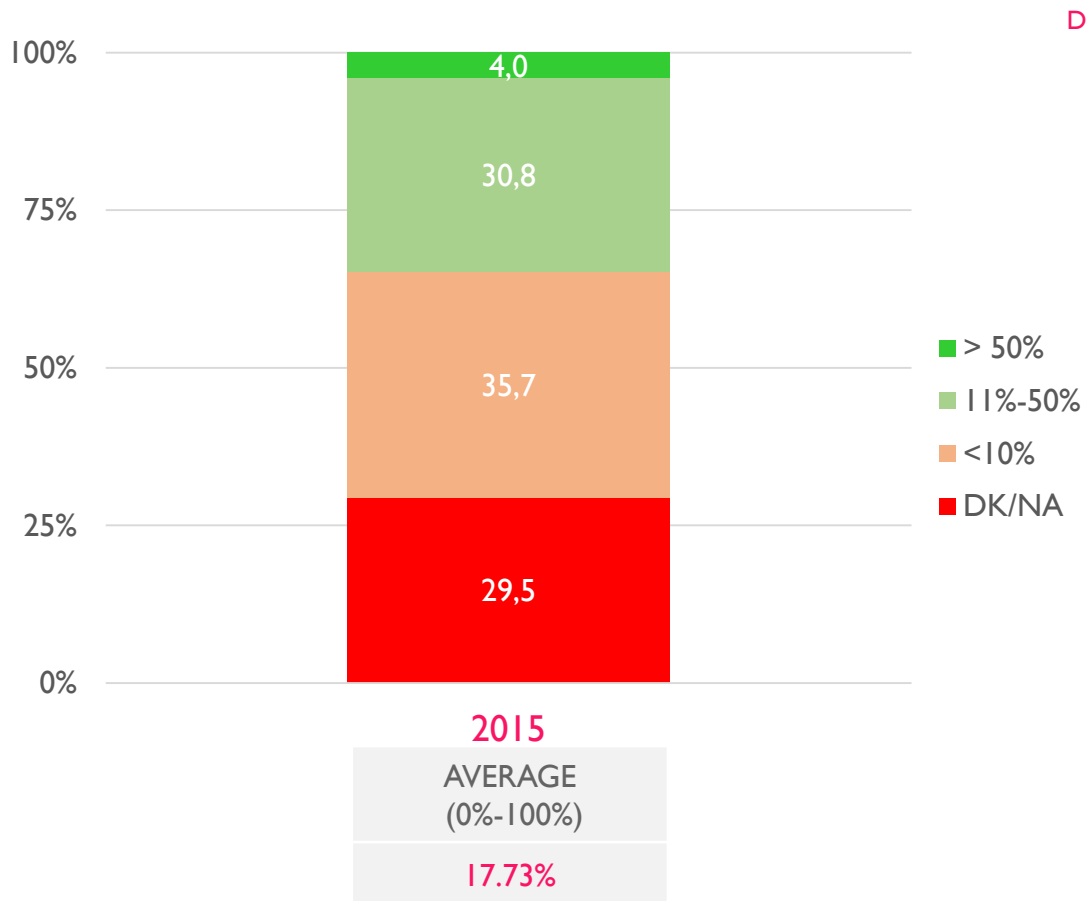


RELATIONSHIPS 2012 (660) 2015 (349)

RELATIONSHIPS ARGENTINA-BRAZIL-CHILE-COLOMBIA-SPAIN-CHINA (2014), INDIA (2012), MEXICO & UK (2015)

Client-Agency Relationship | CONTRIBUTION TO BUSINESS GROWTH

ADVERTISING AGENCIES



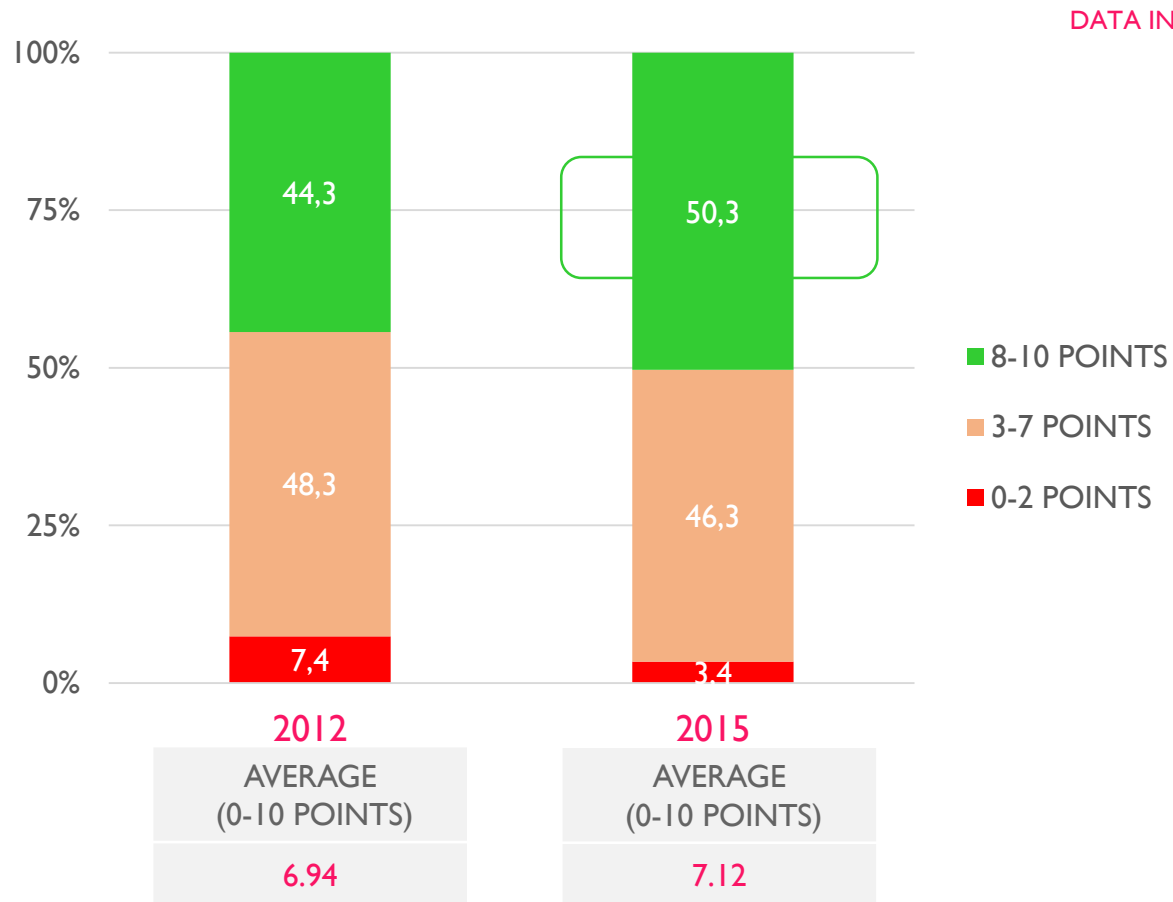
RELATIONSHIPS ADVERTISING 2015 (149)

RELATIONSHIPS ARGENTINA-BRAZIL-CHILE-COLOMBIA-SPAIN-CHINA (2014), MEXICO & UK (2015)

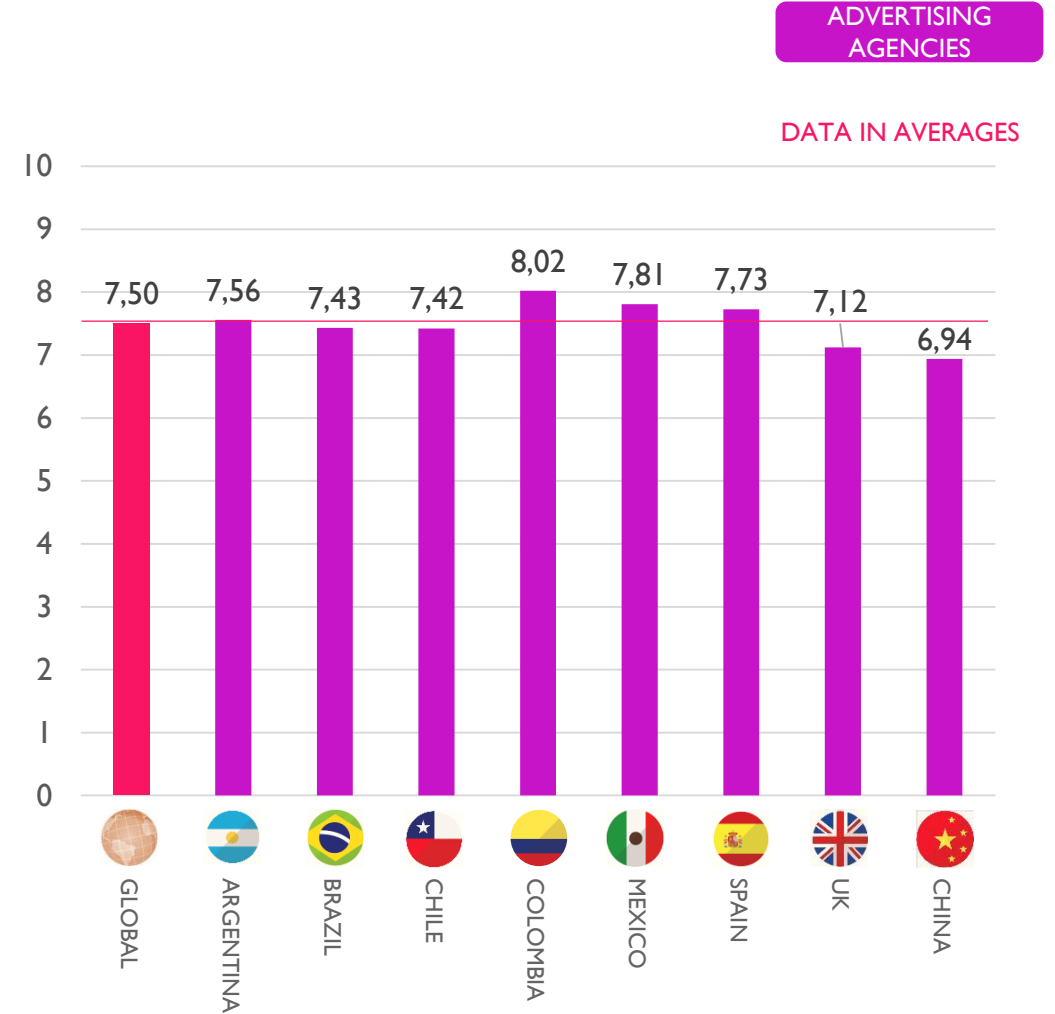
QUESTION: HOW MUCH DOES YOUR ADVERTISING AGENCY CONTRIBUTE TO YOUR OVERALL BUSINESS GROWTH?

Client-Agency Relationship | RECOMMENDATION LEVEL (SCALE 0 -10)

AVERAGE DATA ACCORDING TO A '0-10 POINTS SCALE' : 0 (WOULD NOT RECOMMEND) 10 (RECOMMEND)



RELATIONSHIPS ADVERTISING 2012 (347) - 2015 (149)



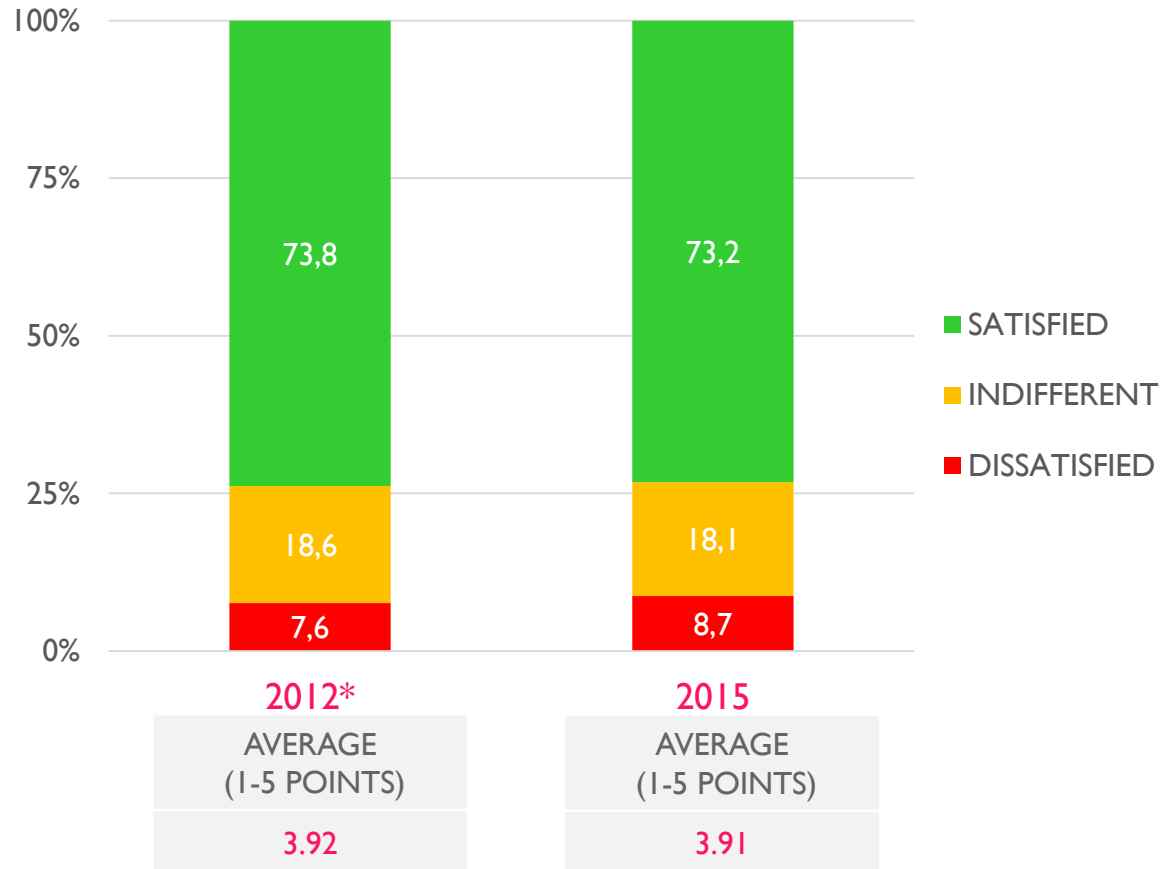
RELATIONSHIPS ARGENTINA-BRAZIL-CHILE-COLOMBIA-SPAIN-CHINA (2014), MEXICO & UK (2015)

Client-Agency Relationship | LEVEL OF SATISFACTION

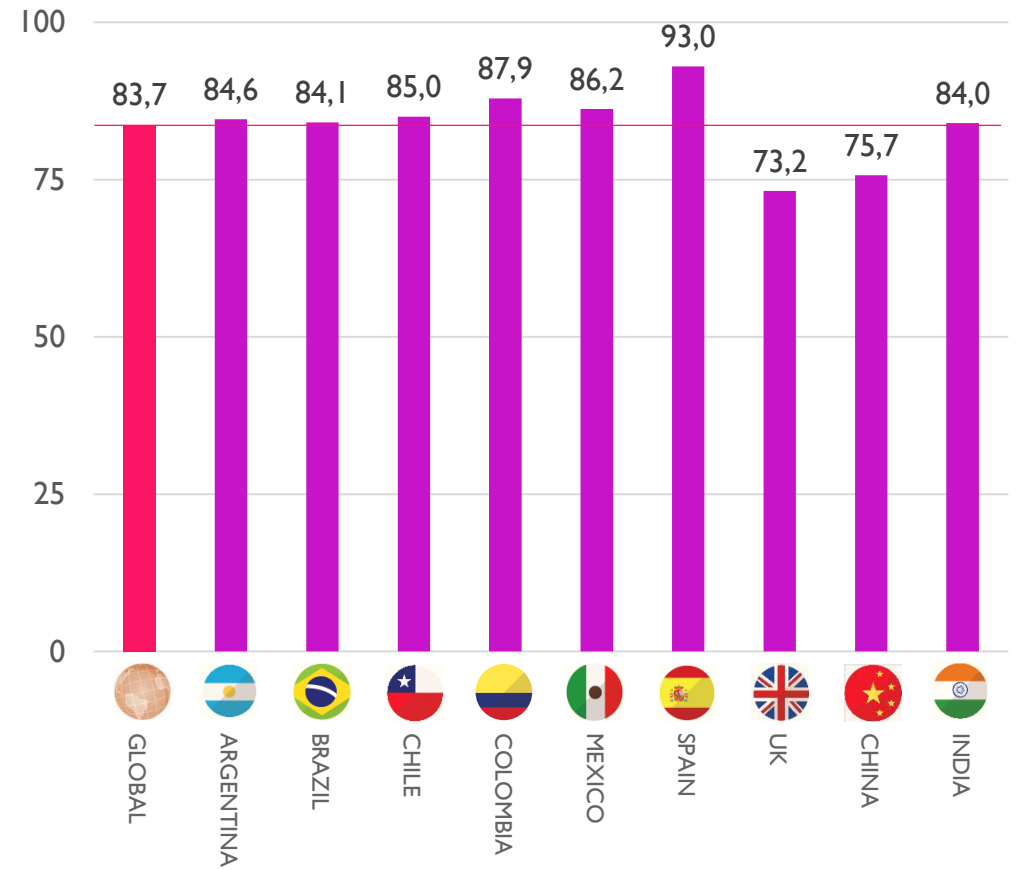
AVERAGE DATA ACCORDING TO A 'LEVEL OF SATISFACTION SCALE': 1 (VERY DISSATISFIED), 2 (DISSATISFIED), 3 (INDIFFERENT), 4 (SATISFIED), 5 (VERY SATISFIED)

DATA IN %

ADVERTISING AGENCIES



RELATIONSHIPS ADVERTISING 2012* (660) - 2015 (149)



RELATIONSHIPS ARGENTINA-BRAZIL-CHILE-COLOMBIA-SPAIN-CHINA (2014), MEXICO & UK (2015)

(*) DATA BASED ON MENTIONS FOR ALL CREATIVE AGENCIES IN 2012

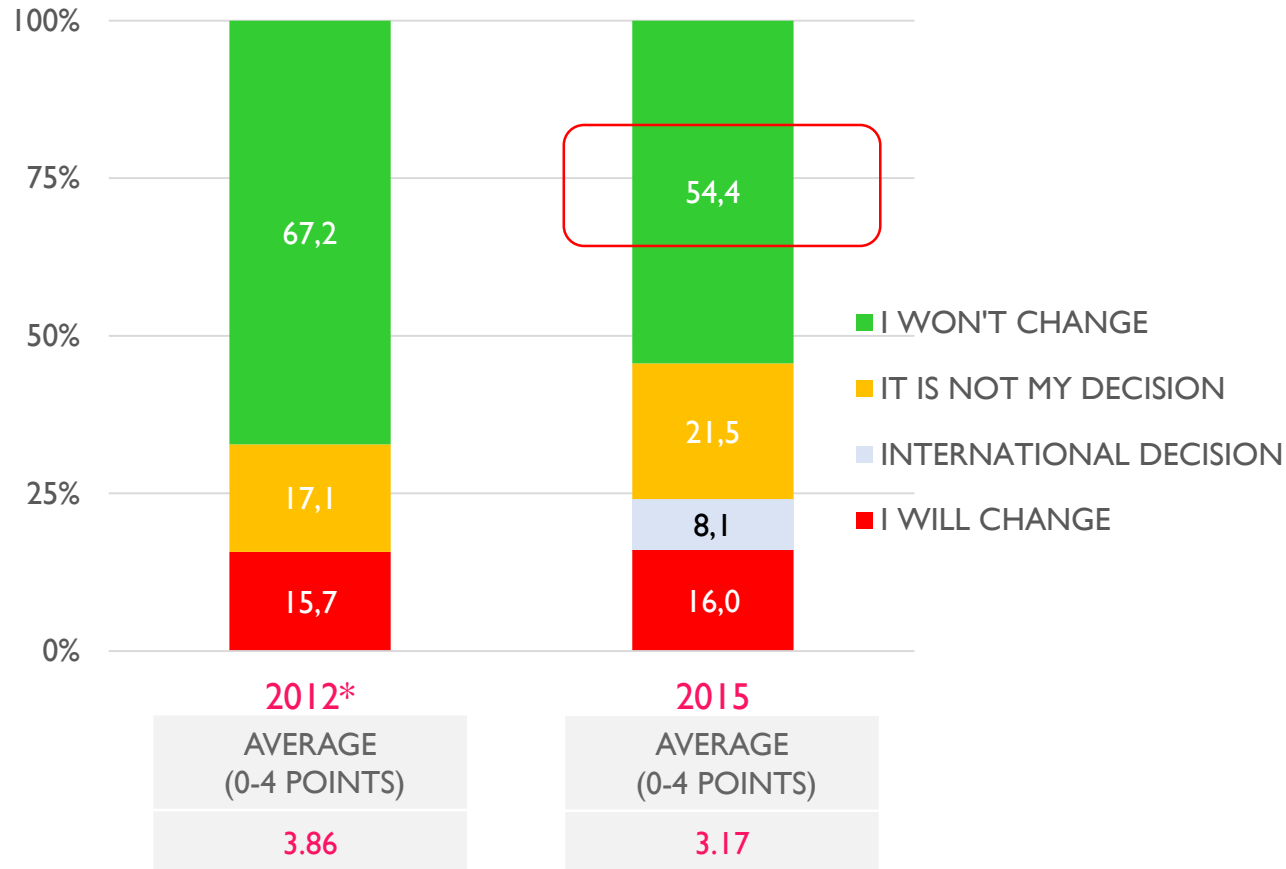
Client-Agency Relationship | CHANGE OF AGENCY

AVERAGE DATA ACCORDING TO THE FOLLOWING SCALE:

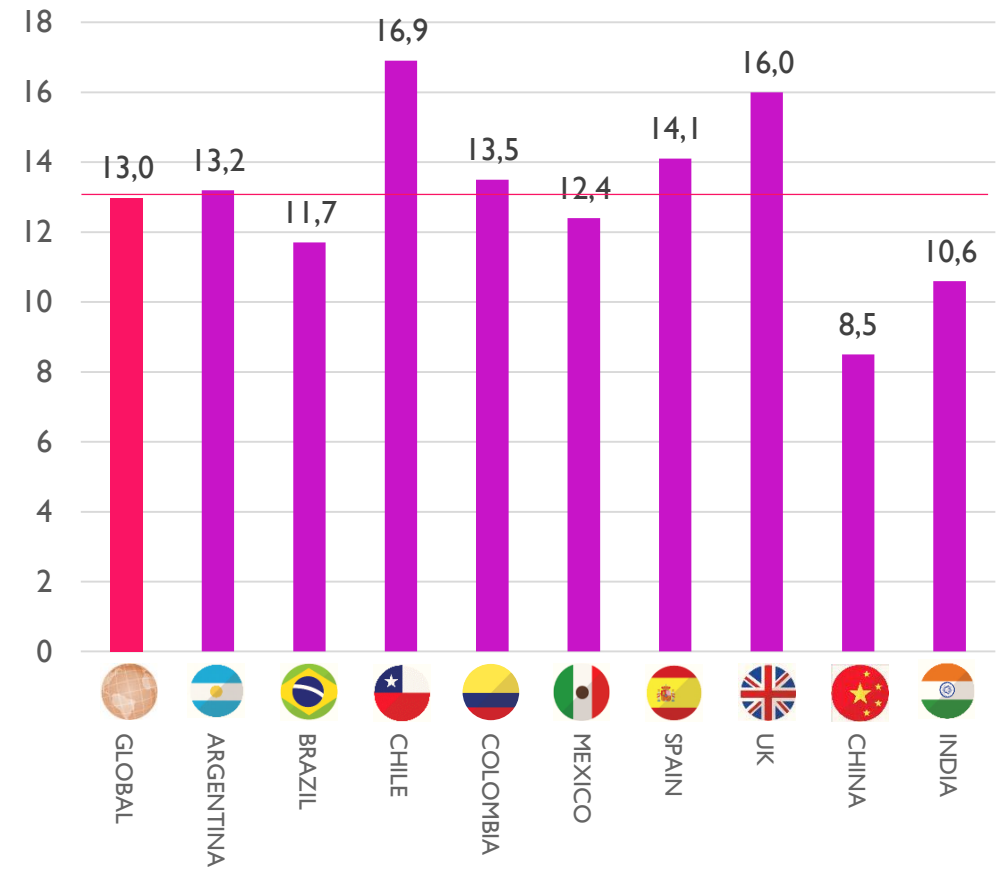
0 (INTERNATIONAL DECISION / NOT MY DECISION), 1 (WON'T CHANGE), 2 (PROBABLY WON'T CHANGE), 3 (WILL PROBABLY CHANGE), 4 (WILL DEFINITELY CHANGE)

DATA IN %

ADVERTISING AGENCIES



RELATIONSHIPS ADVERTISING 2012* (660) - 2015 (149)



RELATIONSHIPS ARGENTINA-BRAZIL-CHILE-COLOMBIA-SPAIN (2014), MEXICO & UK (2015)

(*) DATA BASED ON MENTIONS FOR ALL CREATIVE AGENCIES IN 2012

Agency image overview | HIGH PROFILE CREATIVE AGENCY PROFESSIONALS (TOP 10)

MENTIONS

CREATIVE AGENCIES



1st (3rd)
JAMES MURPHY
ADAM&EVEDDB
10 MENTIONS



2nd (4th)
TREVOR BEATTIE
BMB
7 MENTIONS



3rd (22nd)
BEN PRIEST
ADAM&EVEDDB
5 MENTIONS



3rd (1st)
RORY SUTHERLAND
OGILVY&MATHER
5 MENTIONS



5th (5th)
CILLA SNOWBALL
AMV BBDO
4 MENTIONS



5th (12th)
DAVID GOLDING
ADAM&EVEDDB
4 MENTIONS



7th (7th)
CHARLIE SNOW
DLKW LOWE
3 MENTIONS



7th (2nd)
SIR JOHN HEGARTY
BBH
3 MENTIONS



7th (90th)
JONATHAN BOTTOMLEY
BBH
3 MENTIONS



7th (--)
LAURENCE GREEN
101
3 MENTIONS



7th (32nd)
LUCY JAMESON
GREY
3 MENTIONS



7th (90th)
TIM DUFFY
M&C SAATCHI
3 MENTIONS

RESPONDENTS 2012 (207) - 2015 (144)

Agency image overview | BEST CREATIVE CAMPAIGNS (IN THE LAST 2 YEARS)

DATA IN MENTIONS

CREATIVE AGENCIES

ARGENTINA										
BRAZIL										
CHILE										
COLOMBIA										
MEXICO										
SPAIN										
UK										
CHINA										
INDIA										

Agency image overview | MOST RESPECTED COMPANIES (FOR THEIR MARKETING)

DATA IN MENTIONS

TOTAL SAMPLE

 ARGENTINA										 PEPSICO
 BRAZIL										
 CHILE										  
 COLOMBIA								 		  
 MEXICO							 		  	
 SPAIN										
 UK										
 CHINA										
 INDIA										



SCOPEN

César Vacchiano
PRESIDENT & CEO

cvacchiano@grupoconsultores.com

Óscar López
RESEARCH & STUDIES DIRECTOR

olopez@grupoconsultores.com

Russell Johnson
MANAGER

rjohnson@gc-uk.co.uk

SPAIN - PORTUGAL - UK - ARGENTINA - BRAZIL - CHILE - COLOMBIA - MEXICO - CHINA - INDIA - SINGAPORE