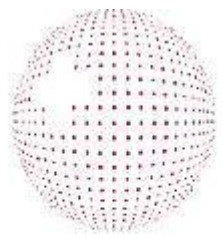


EACA Euromonitor 2012

Participants: NAC members (22)

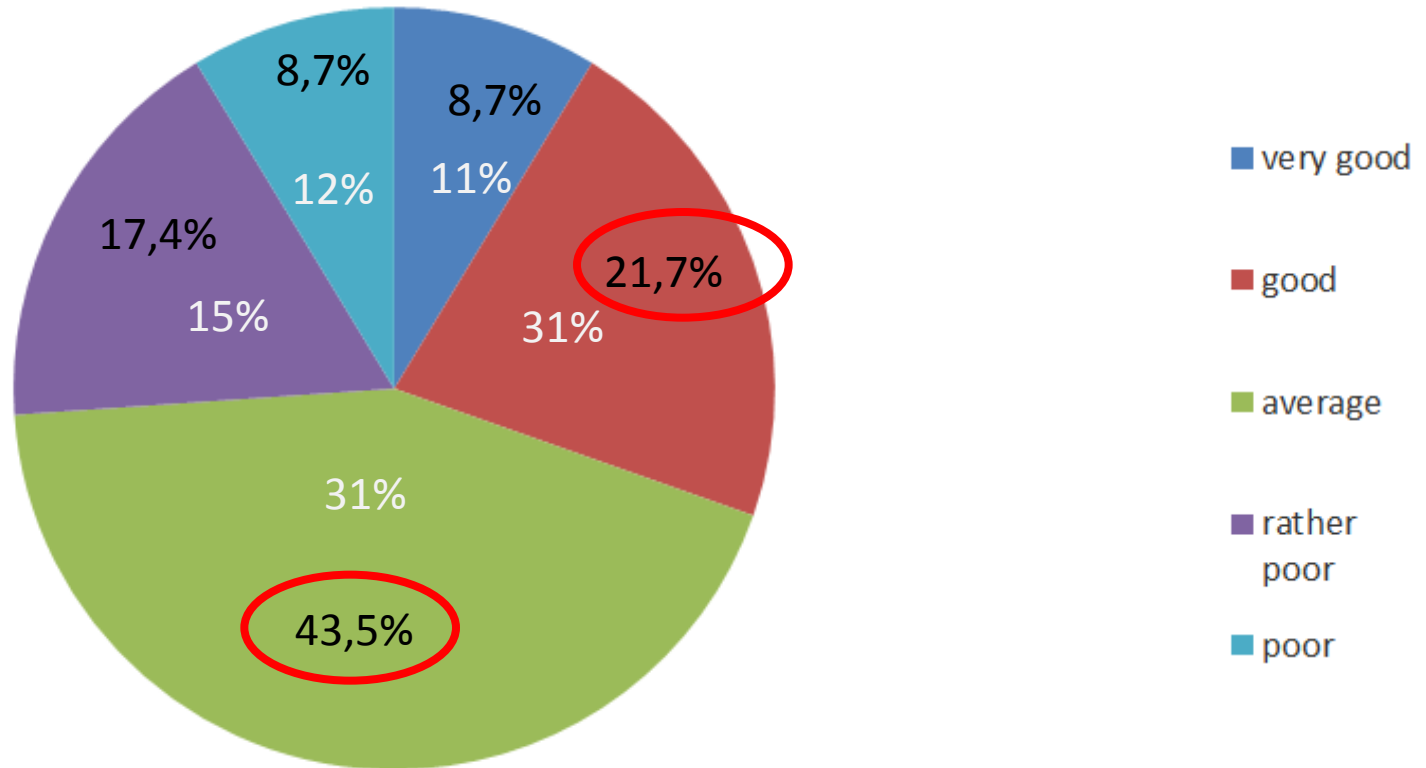


bsw leading swiss agencies

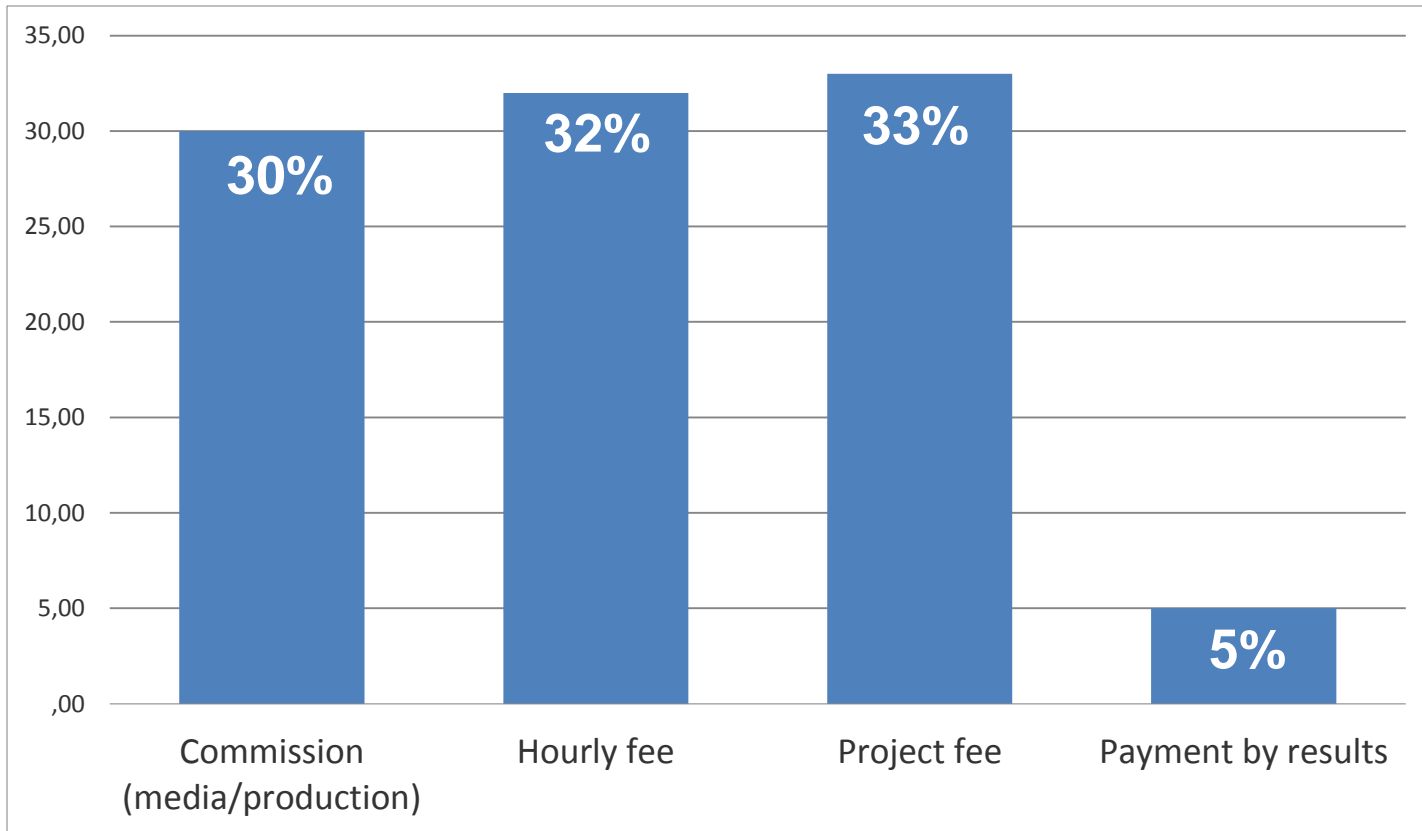
Overview

- 1. Business development 2011**
2. Forecast for 2012
3. Effectiveness of Advertising
4. New business activity

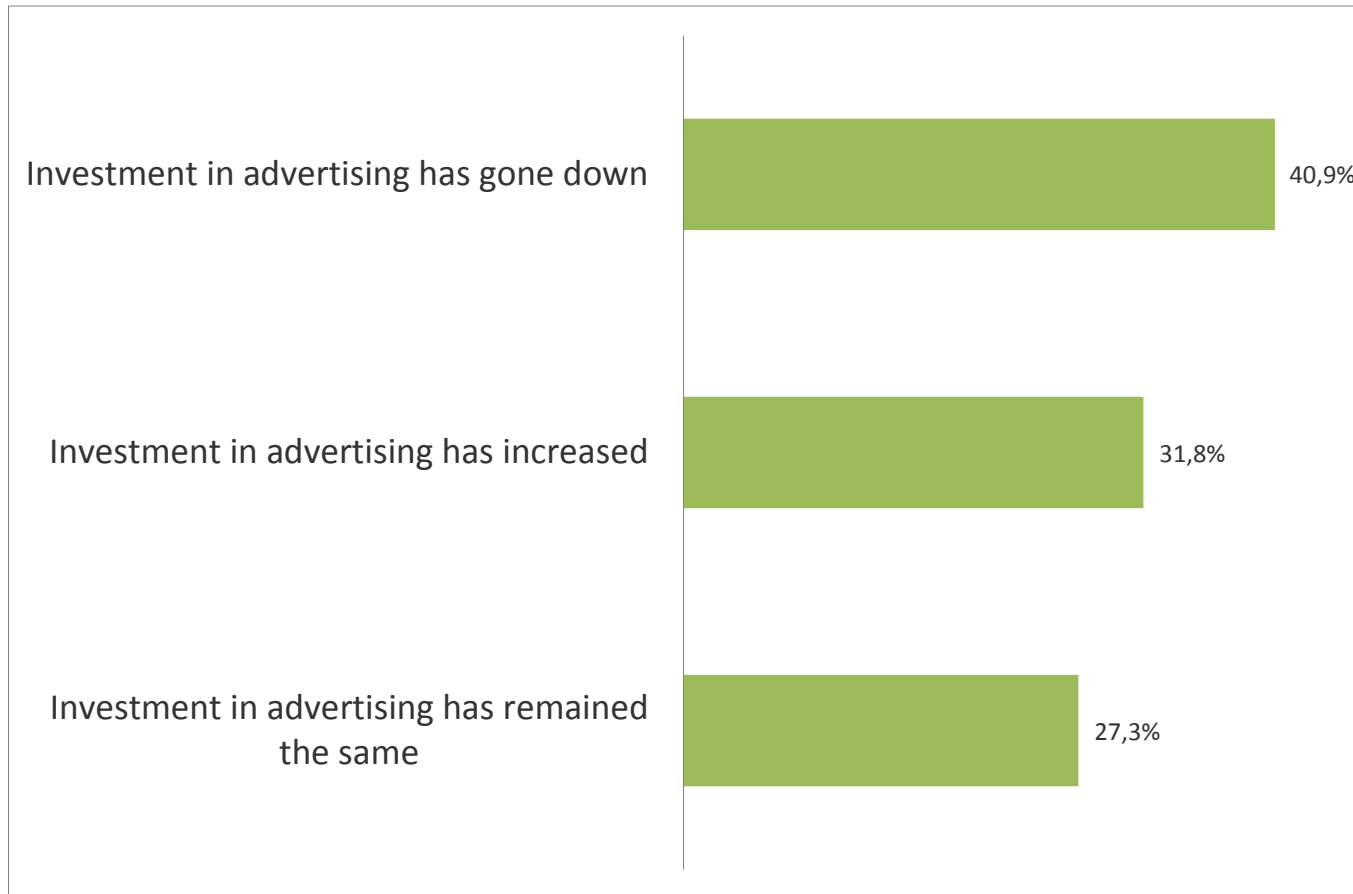
In my view the business year 2011 compared to 2010 for my member agencies was



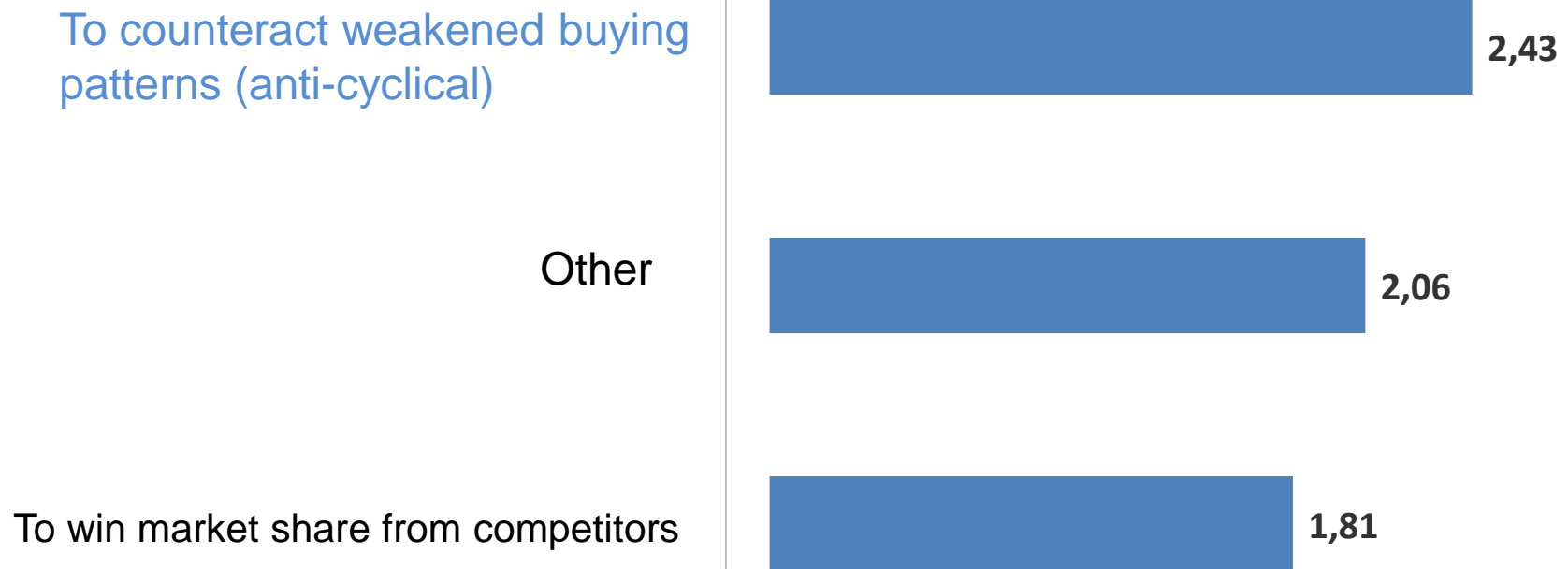
What was the structure of your member agencies' income in 2011 (average)?



Has clients' behaviour towards investment changed during the last year because of the economic situation?



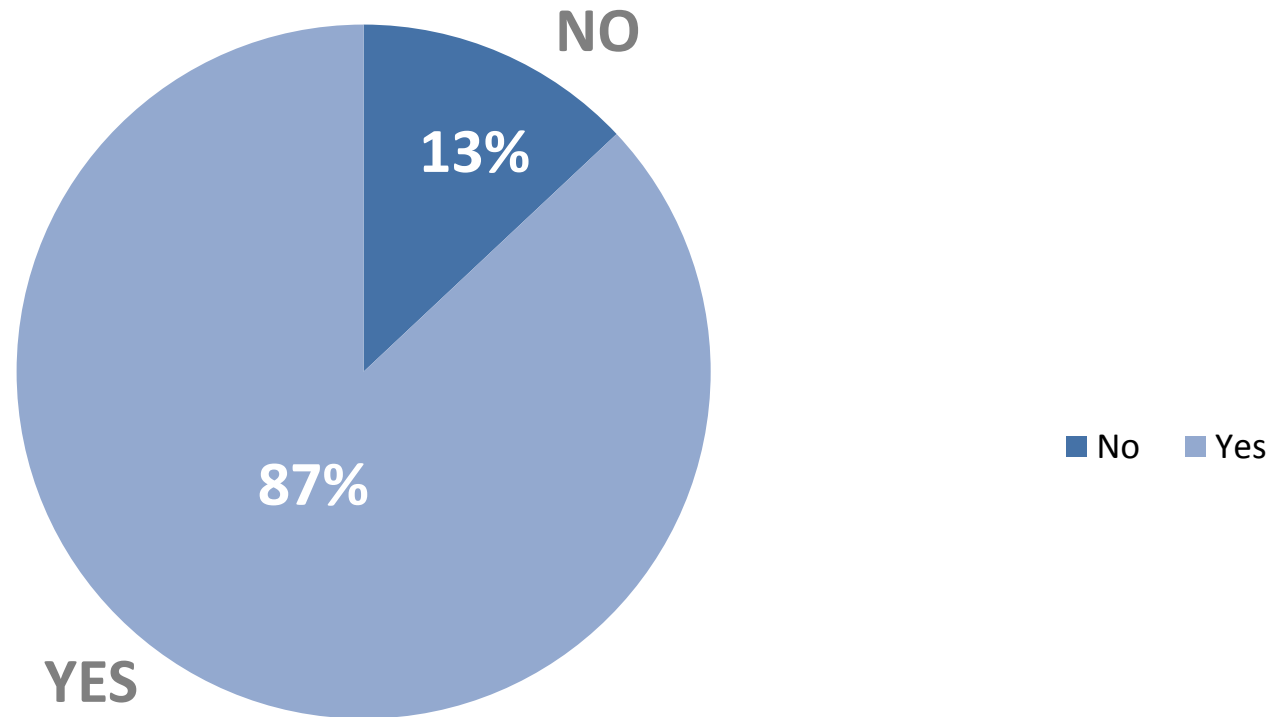
Has clients' behaviour towards investment changed during the last year because of the economic situation?



Which topics are currently most important for your association?

1. Business Development (73,9%)
2. Government relations (47,8%)
3. Training (39.1%)
4. Bringing creative industries together under a new association
5. Agency Remuneration
6. Internationalisation
7. Festivals
8. Regaining overall industry credibility and the association's leadership within the marketplace
9. Make clear the value of communication
10. Organisational development

Has client spending on marketing communications changed in the last year due to economic reasons?



If client spending on marketing communications changed; in which disciplines have the strongest changes occurred?

New media, online marketing, e-commerce

Classical Advertising

Sponsoring

Promotion

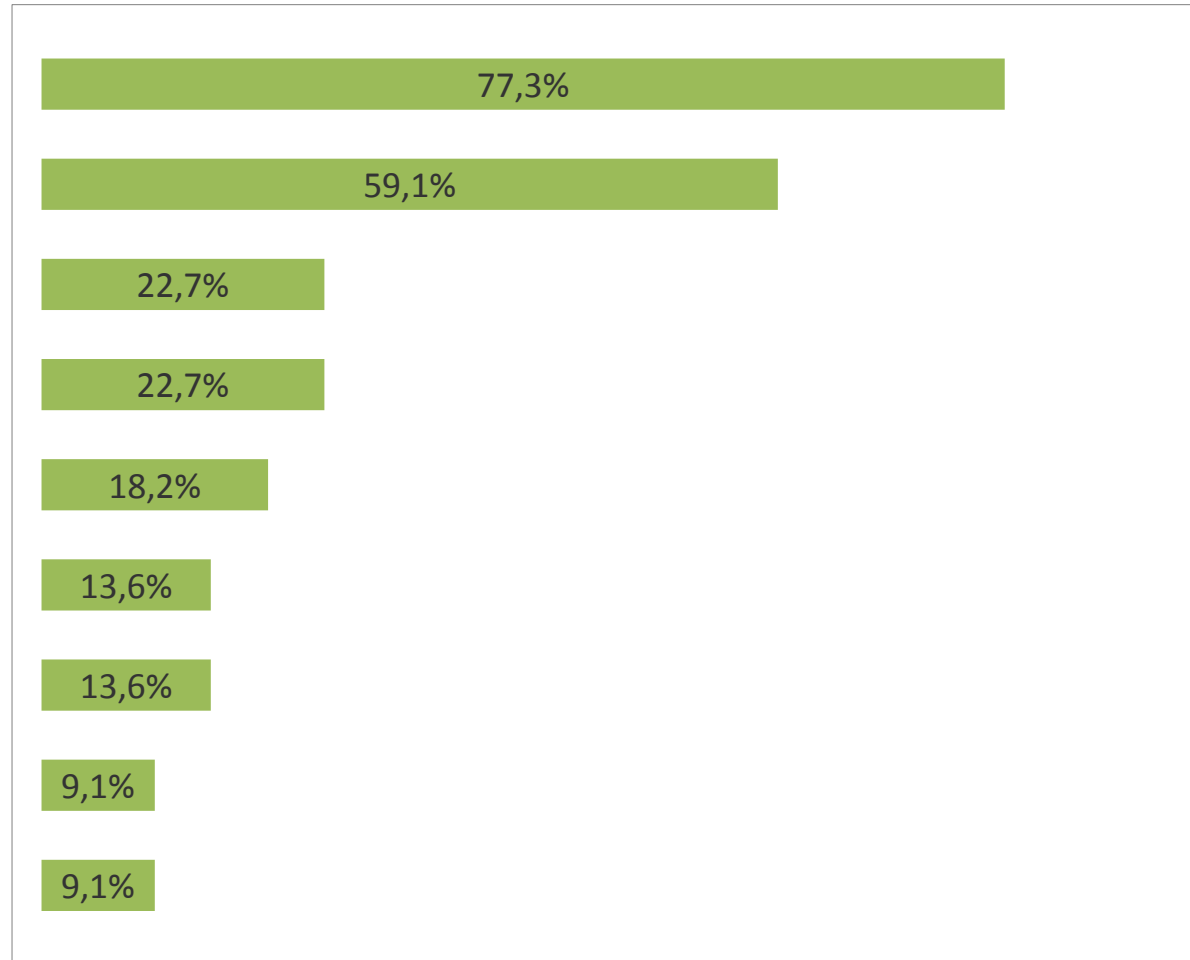
Event Marketing

Public Relations

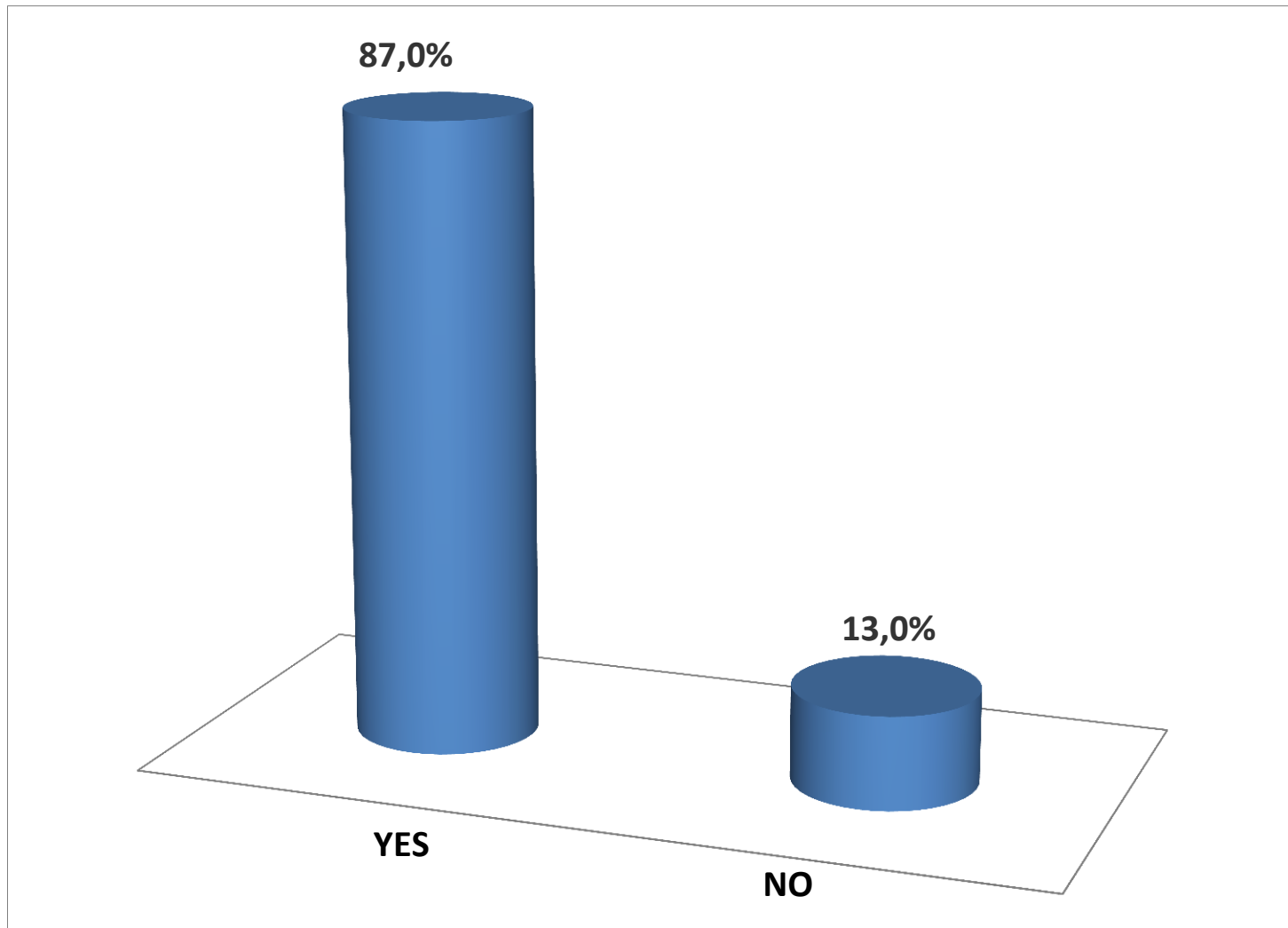
Direct Marketing

Media Planning

Market Research

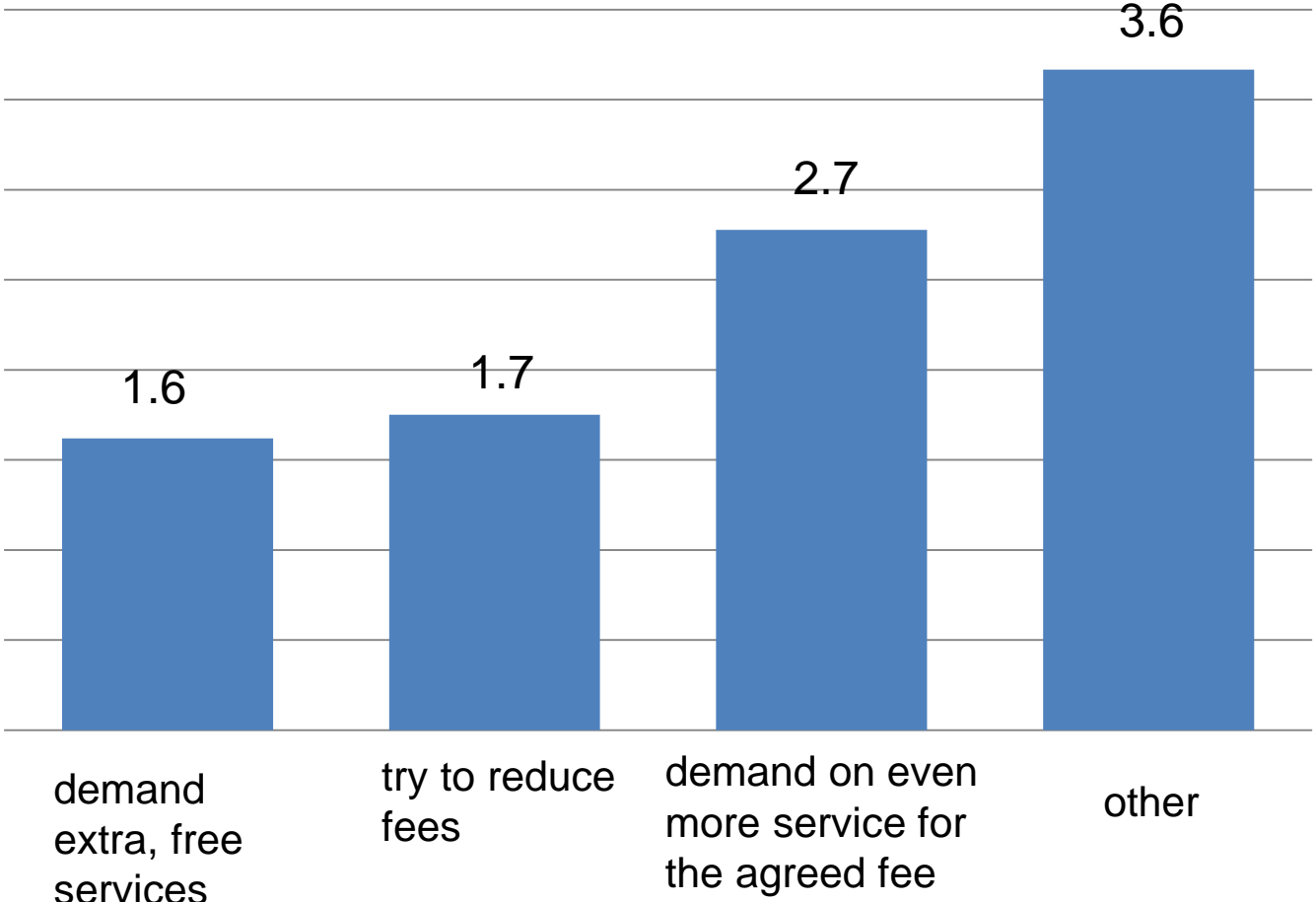


Has client behaviour changed because of the economic situation?

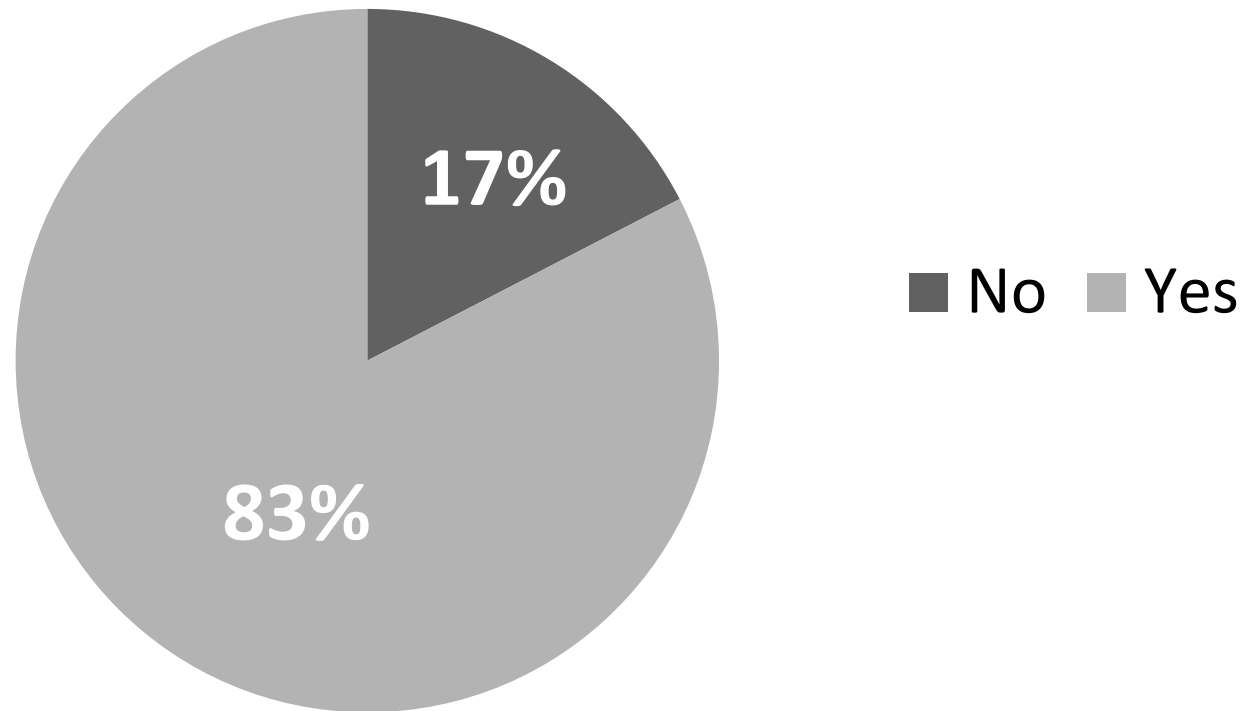


If client behaviour has changed because of the economic situation, clients...

Ranking from 1st to 4th



Has the service emphasis changed?



If the service emphasis has changed, there is an increased need for...

Average Ranking from 1st to 7th

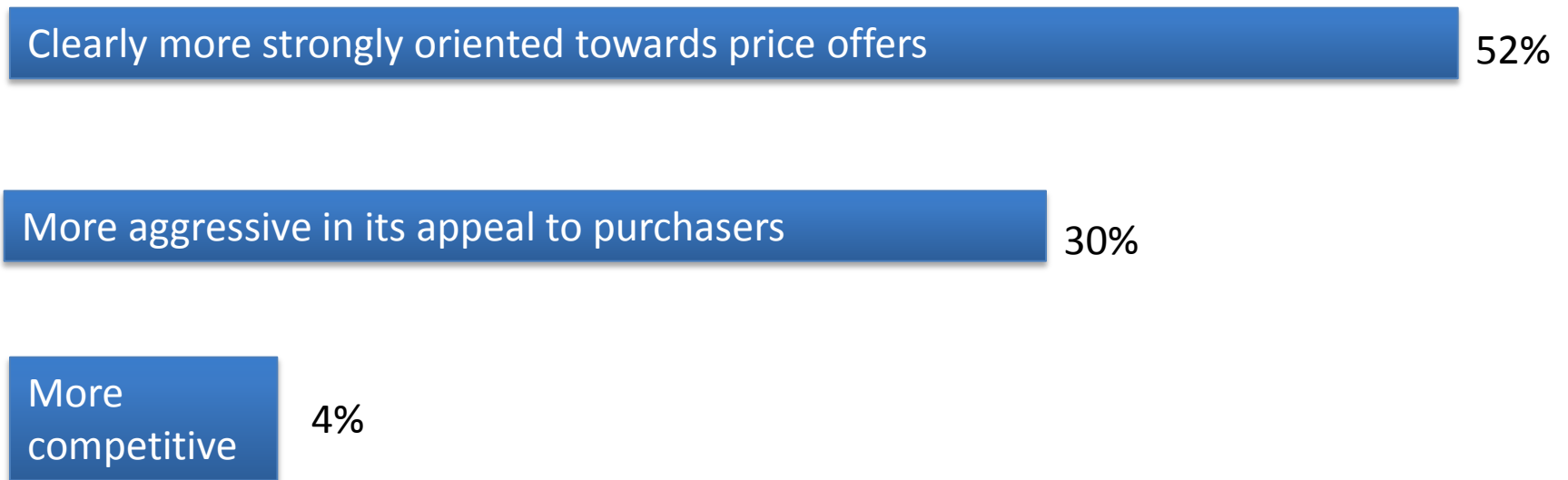


What measures did clients take to react to economically difficult times?

- Cut investment in advertising? **77%**, 85%, 100%
- Negotiated prices downwards? **77%**, 56%, 90%
- Looked for cheaper communications solutions? **64%** 59%
- Concentrated on only one or a very few disciplines? 18%
- Placed priority on minimum investment in classical advertising? 14%
- Invested more to win market share? 9%

- 2011
- 2010
- 2009

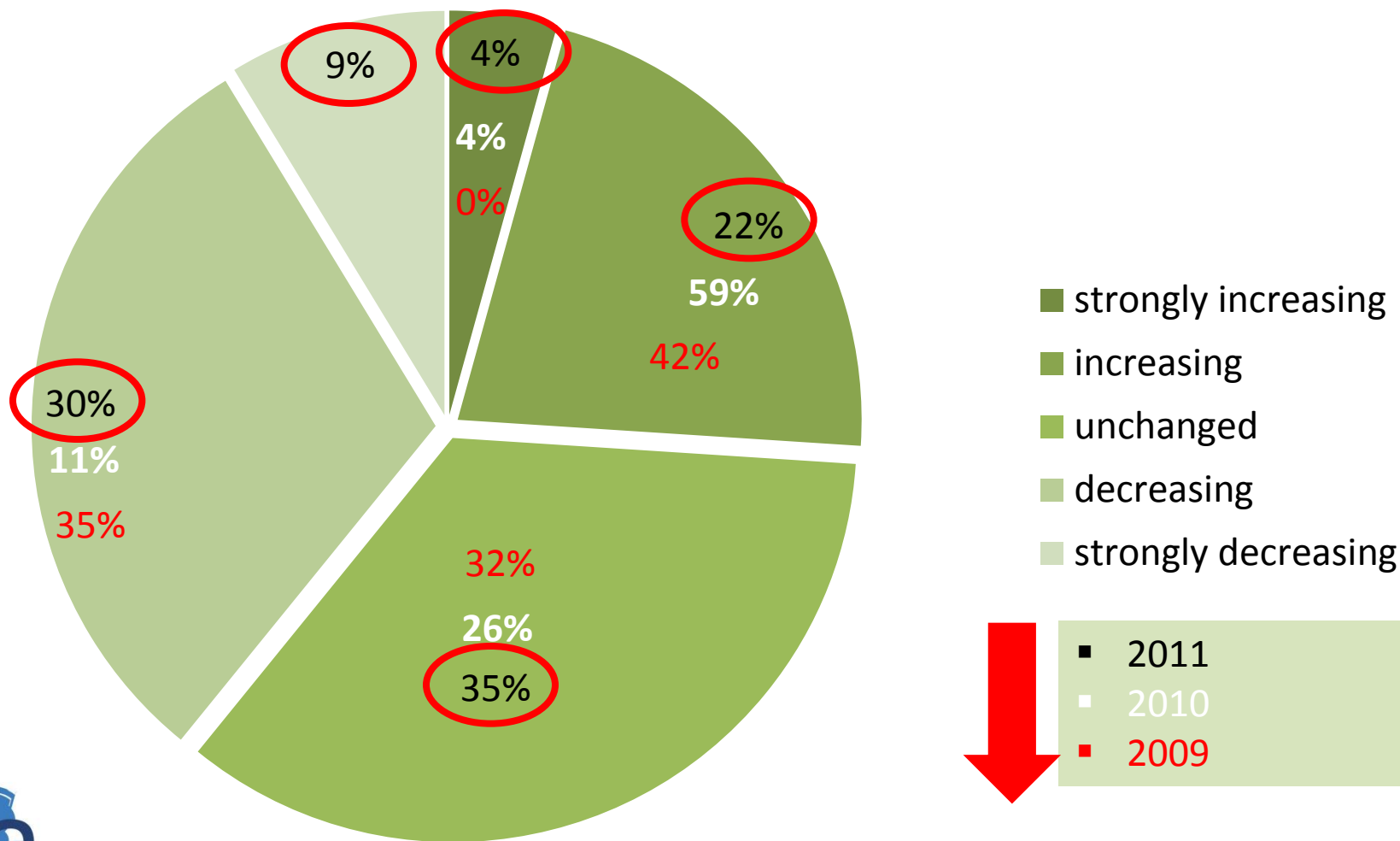
In the tense economic climate, communication has become..



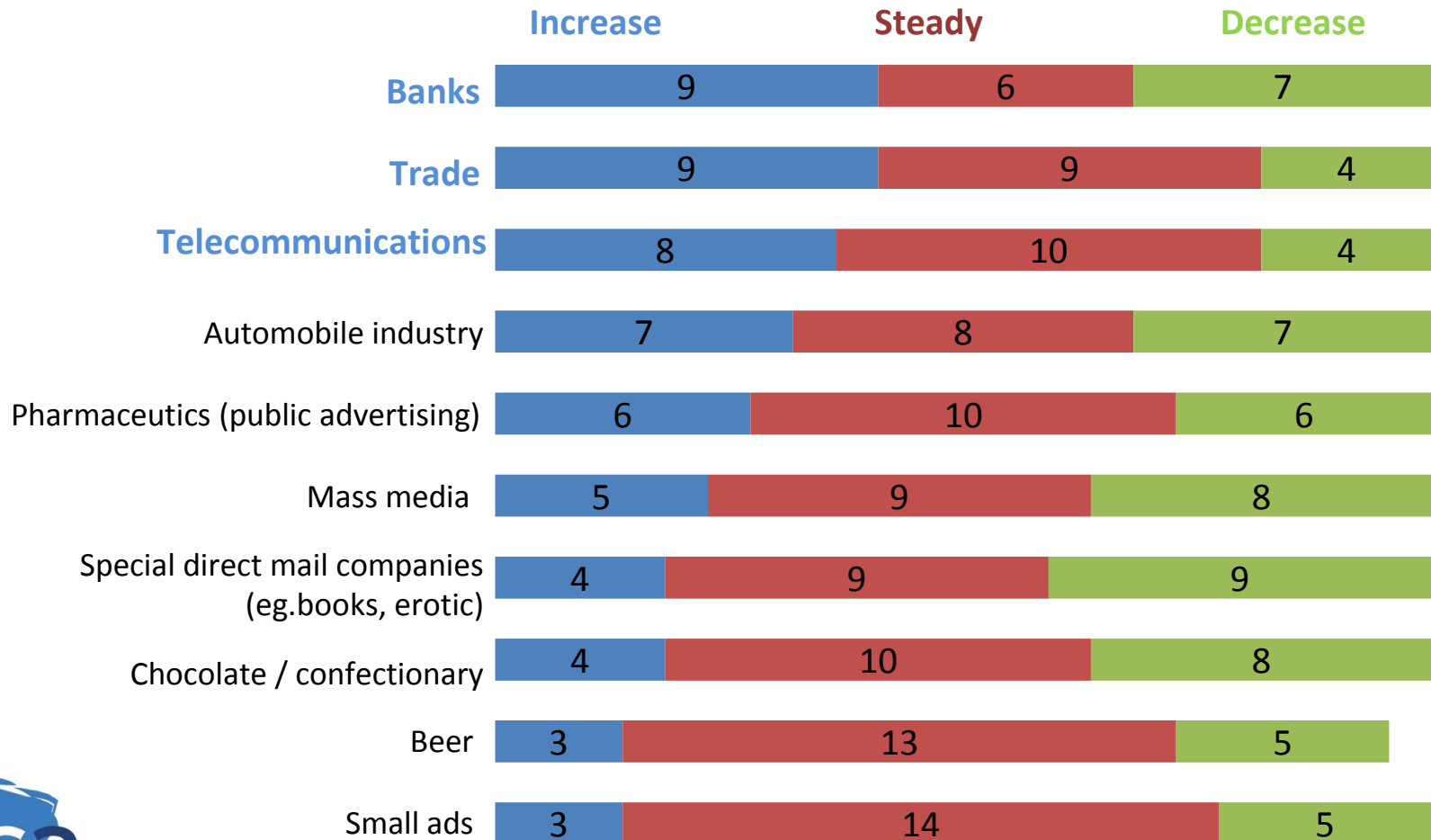
Overview

1. Business development 2011
- 2. Forecast for 2012**
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Estimation of turnover trend for the agency industry for 2012



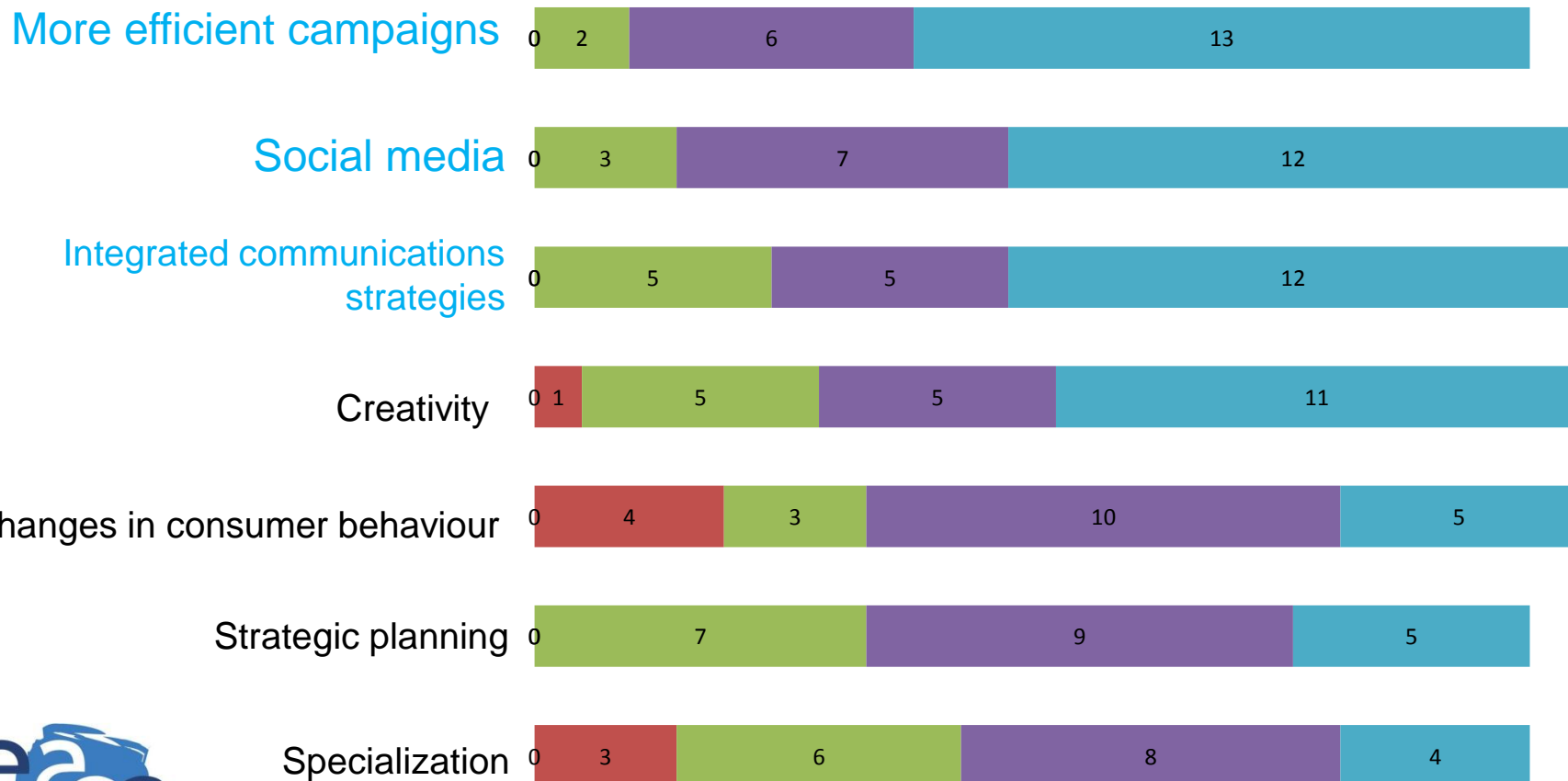
Estimation of development of advertising expenditure in the individual sectors for 2012



2.1. Forecast for 2012: Opportunities

How important will the following factors be for commercial communications agencies in 2012?

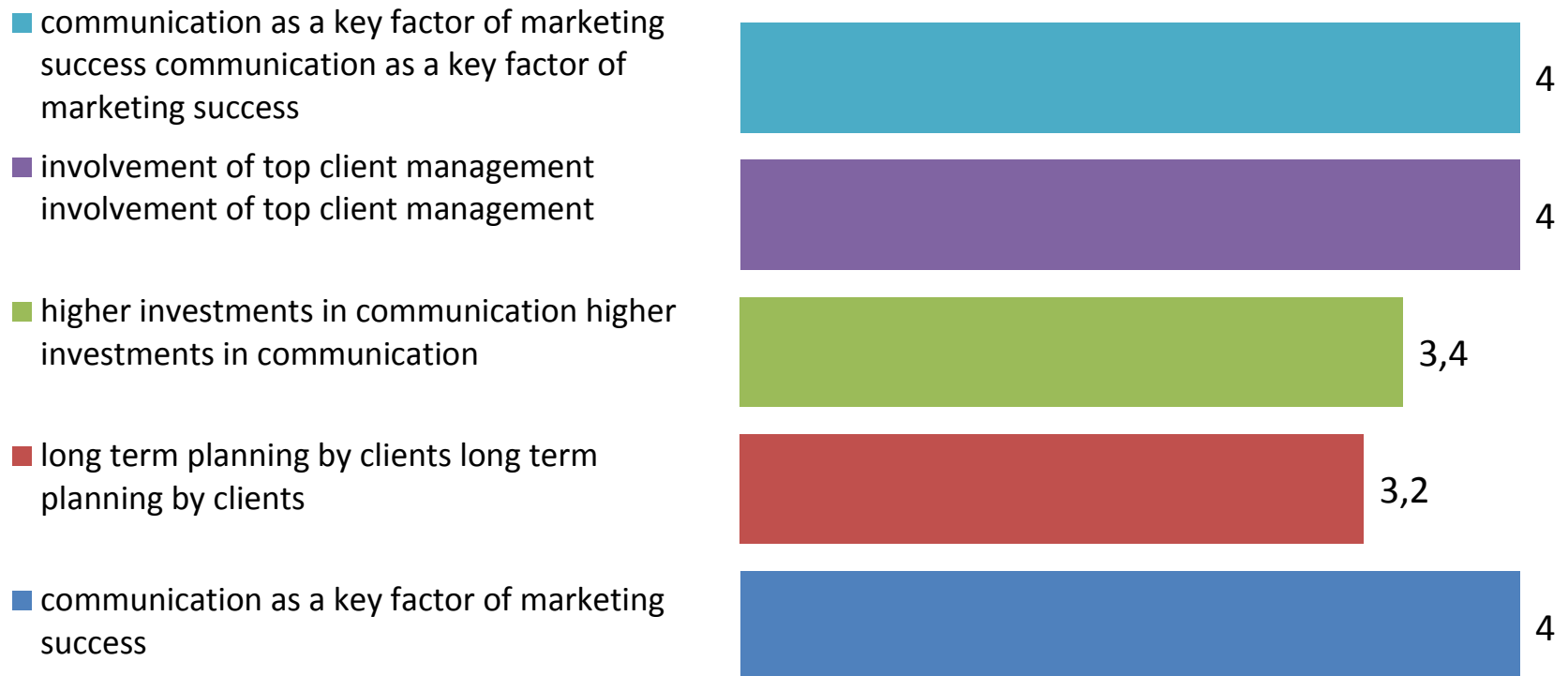
Not important at all 1 2 3 4 5 Very important



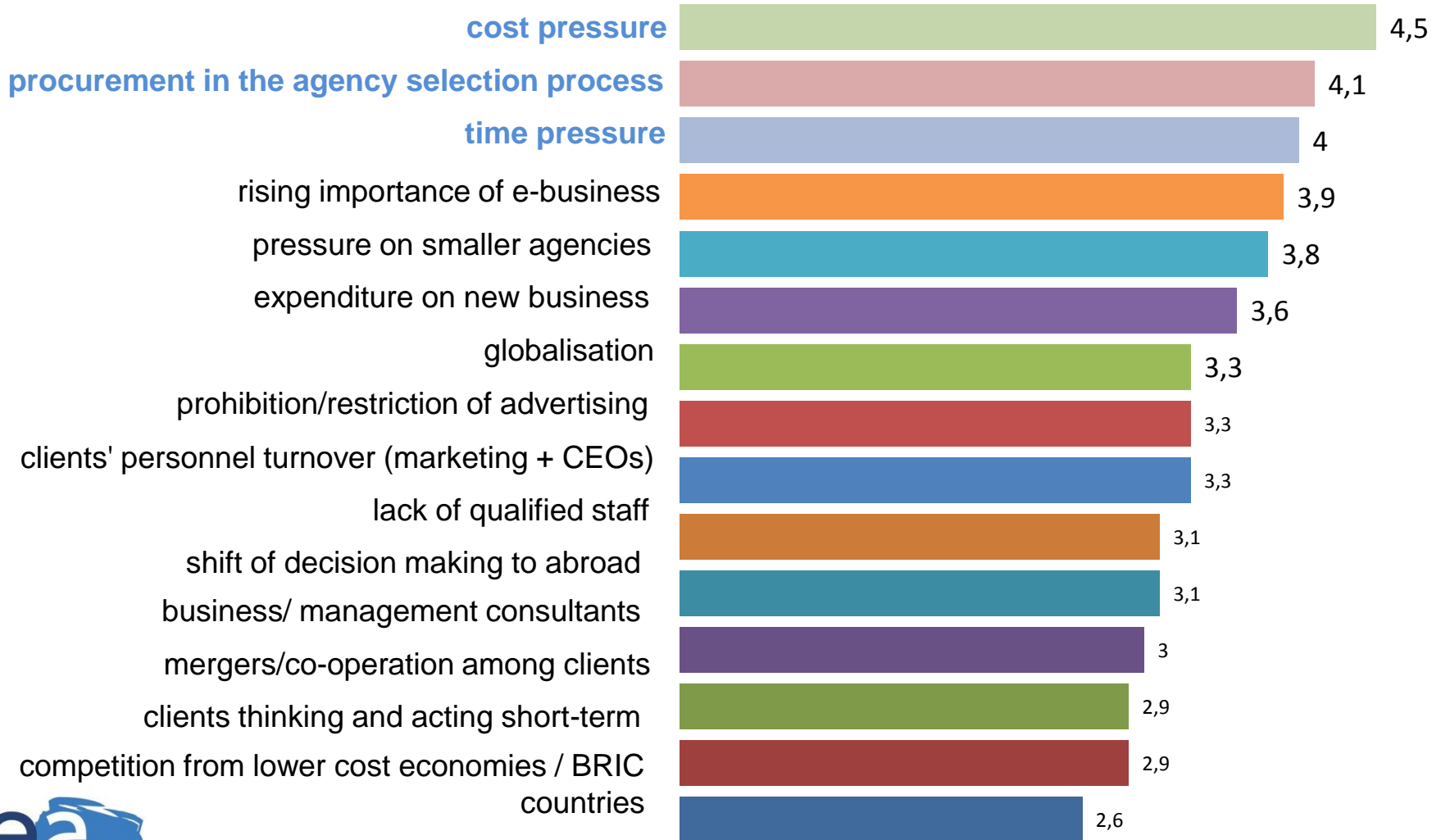
2.1. Forecast for 2012: Threats

How important will the following factors be for commercial communications industry in 2012?

1 - Not important at all → 5 – Very Important



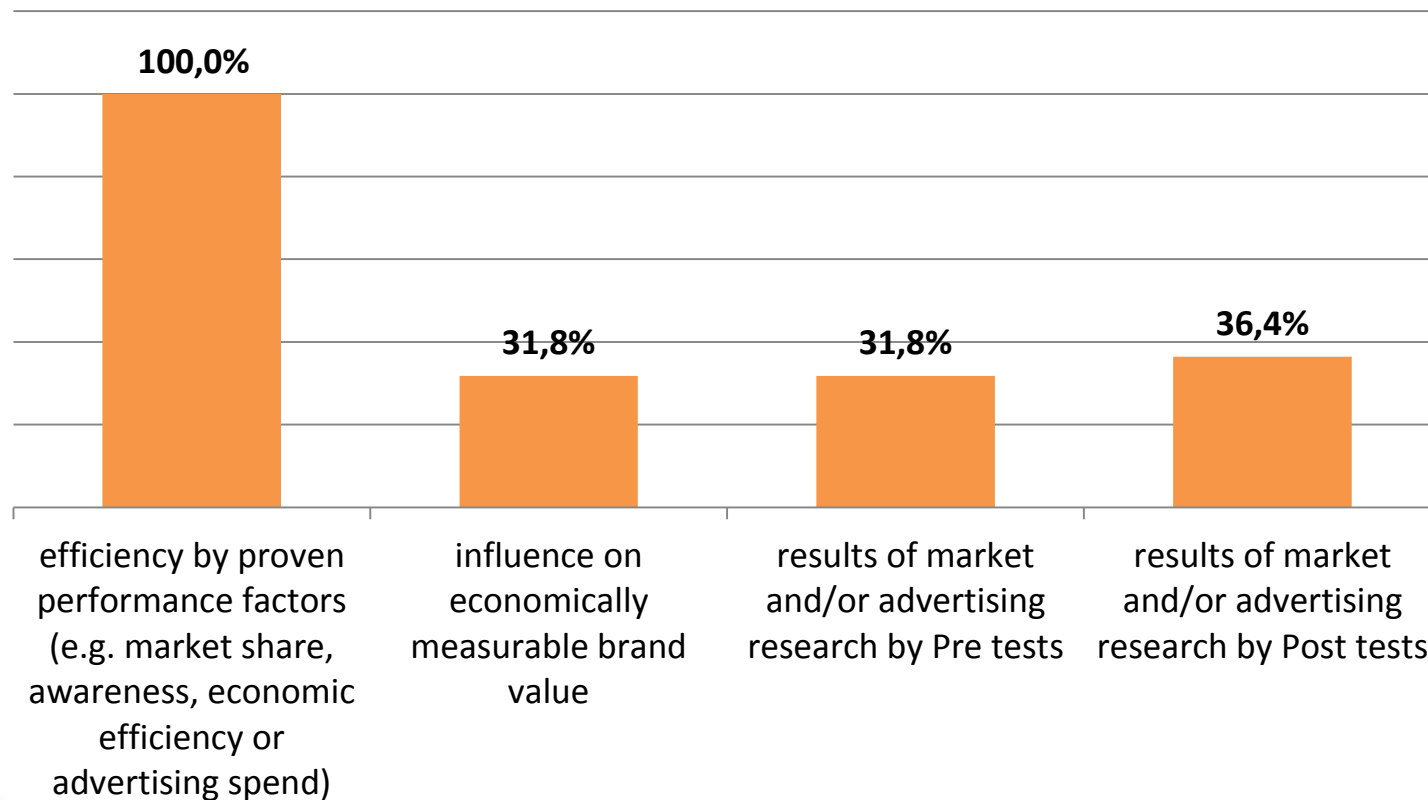
How strongly will the following factors influence and/or preoccupy commercial communications agencies in 2012?



Overview

1. Business development 2011
2. Forecast for 2012
- 3. Effectiveness of Advertising**
4. New business activity

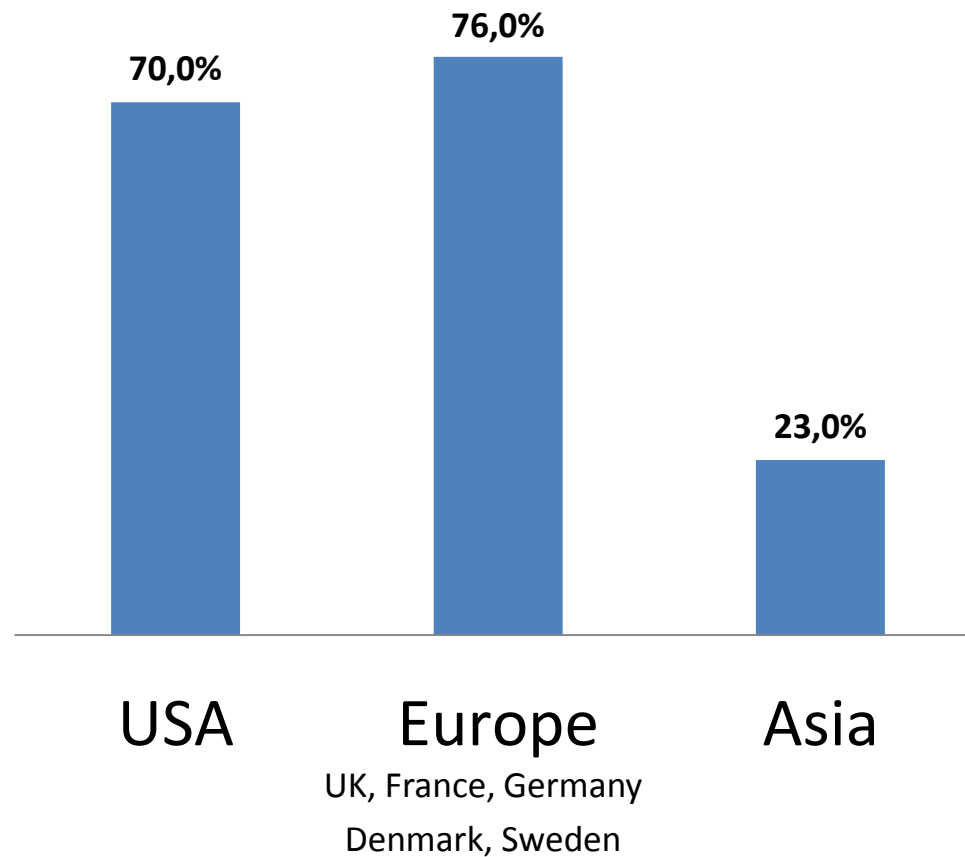
Which of the following criteria do clients use to measure their communication effectiveness?



Overview

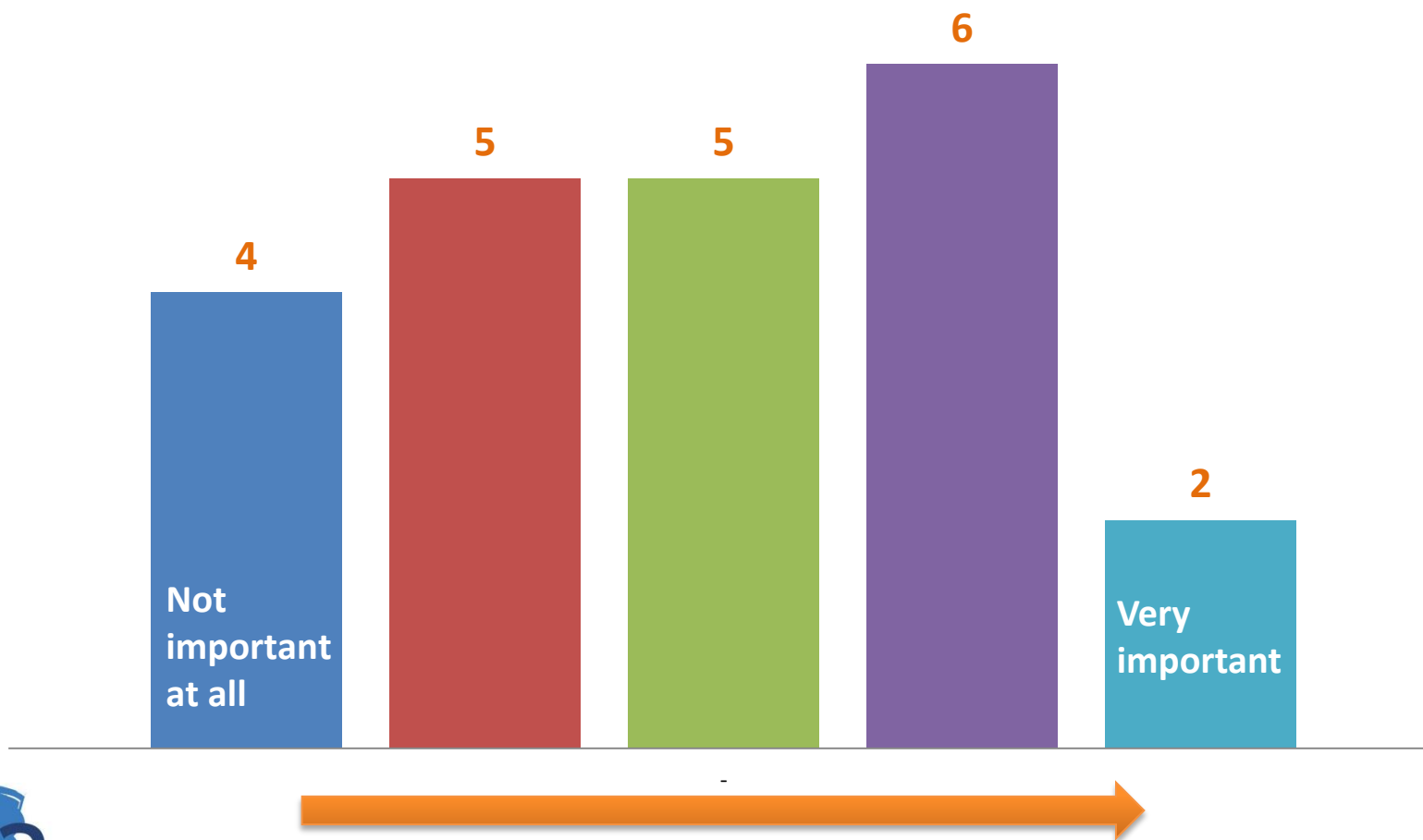
1. Business development 2011
2. Forecast for 2012
3. Effectiveness of Advertising
- 4. New business activity**

Where do the majority of international pitches in your country come from?



What is the importance of **pitch consultants** in your country?

5= very important 1= not at all important



Is it increasing/decreasing?

