



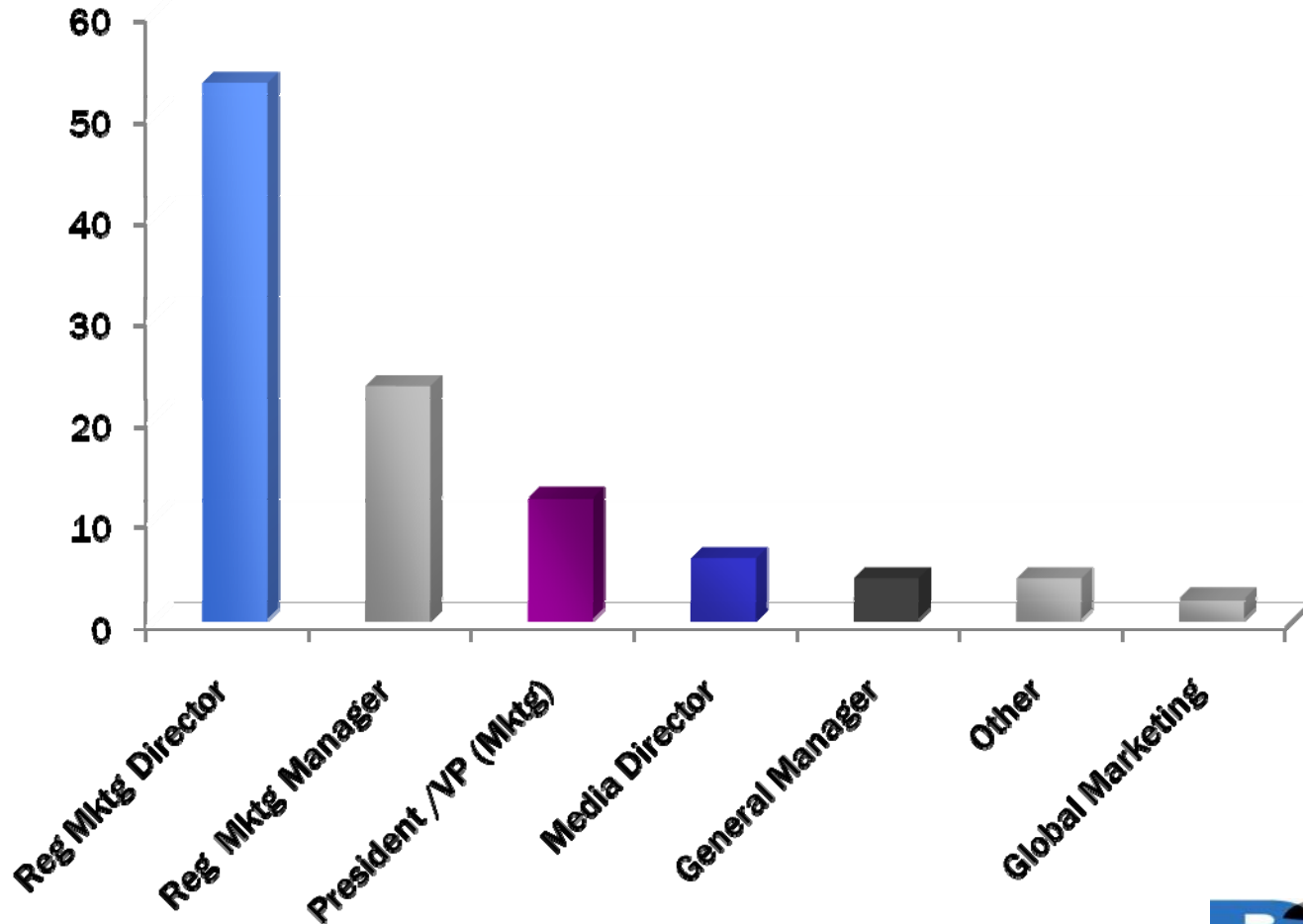
Regional Agency Scope 2009

A research study conducted by Grupo Consultores Europe, and R3 Asia, since 1978

Methodology



Respondents were key marketing decision makers

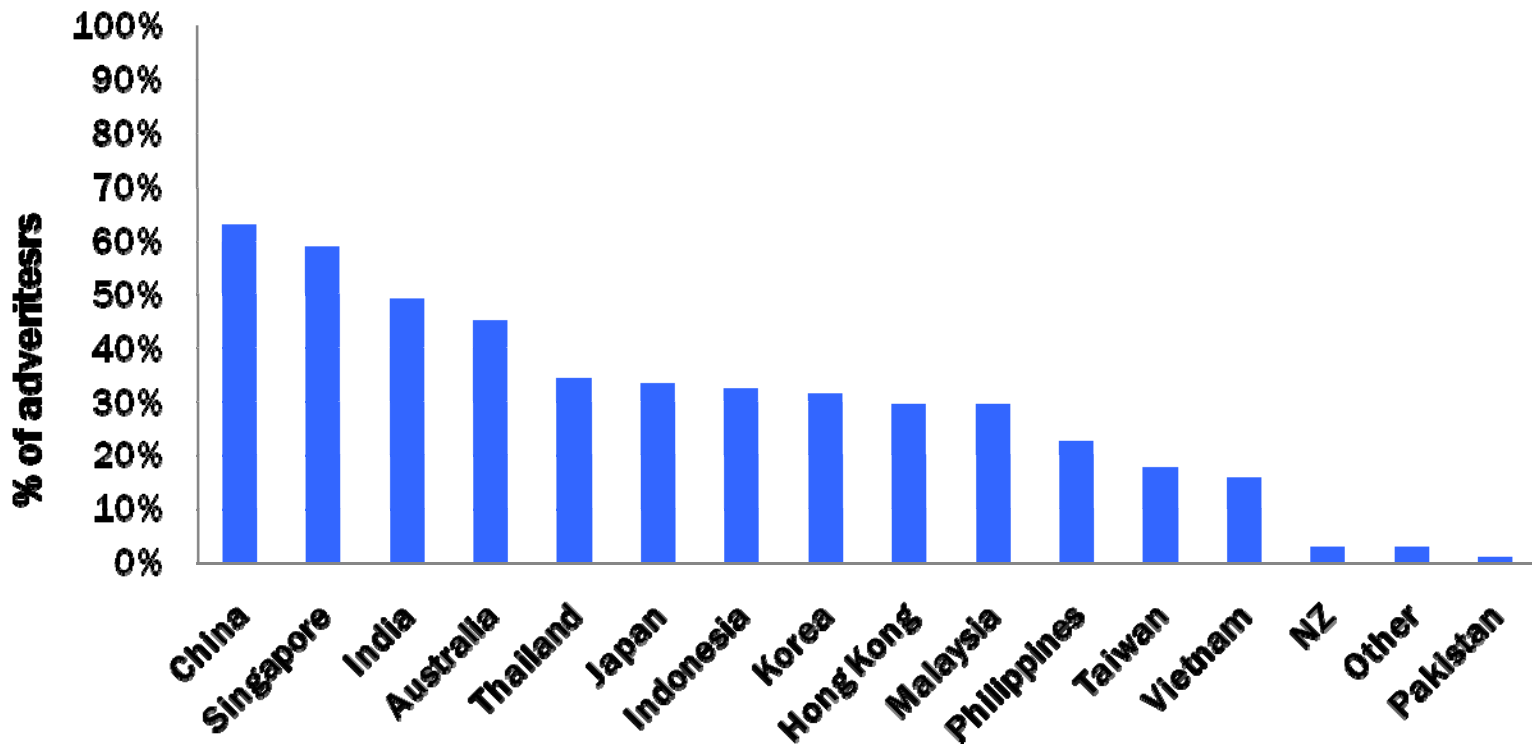


Methodology



Respondents' had a remit of 3+ Asian markets.

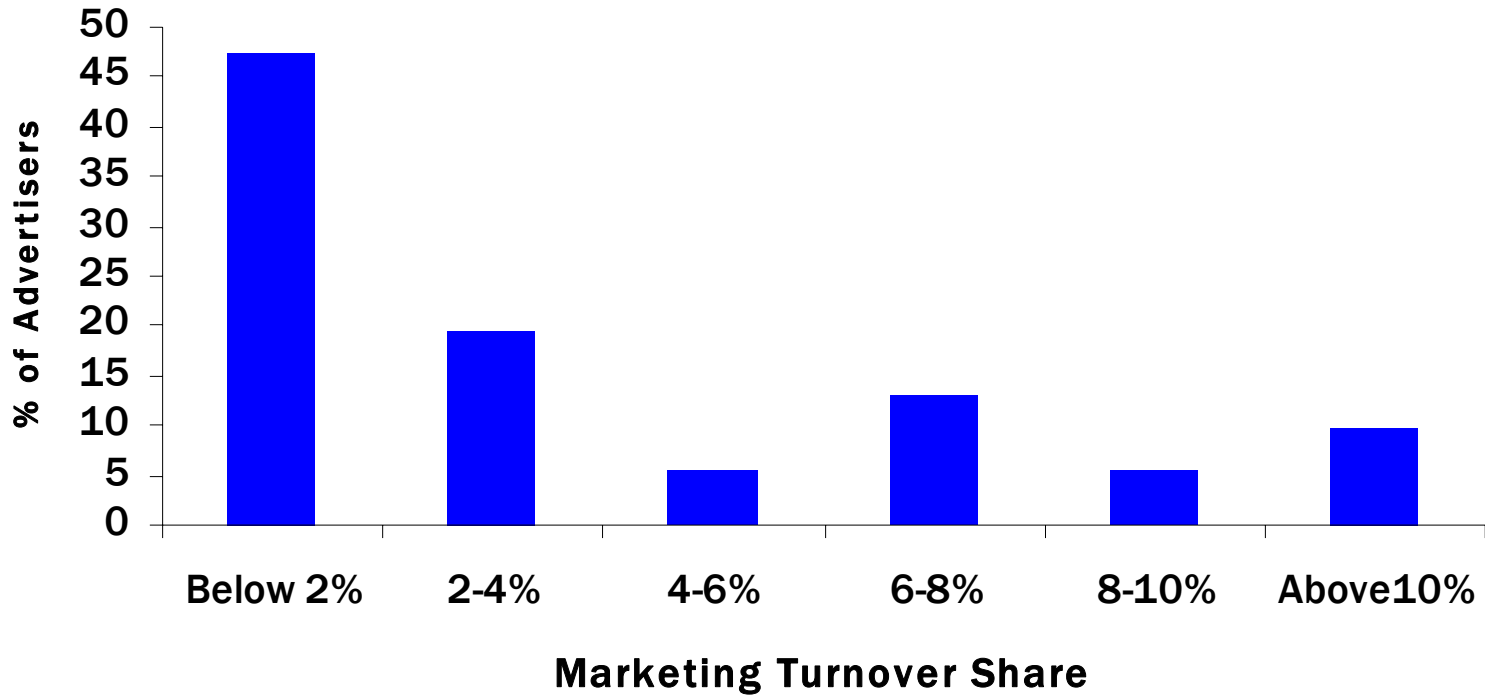
79% managed either one of China or India



Methodology



The average marketing turnover share of companies interviewed was 3.9%



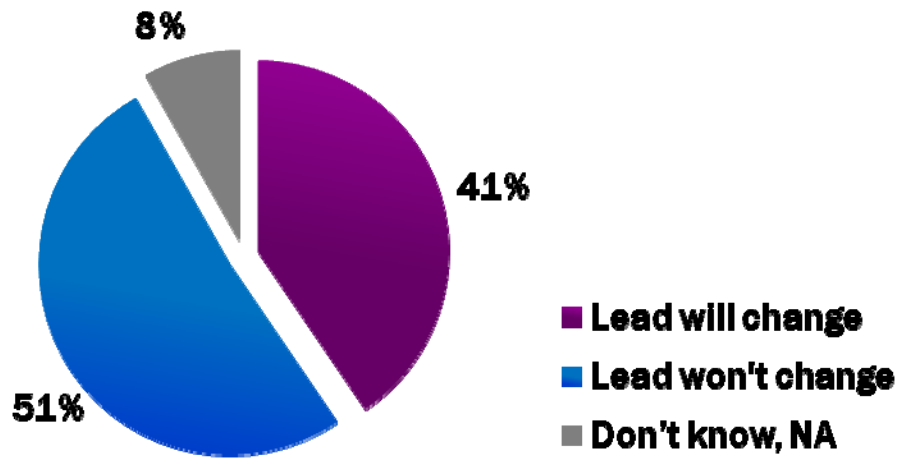
Agency Alignment Trends



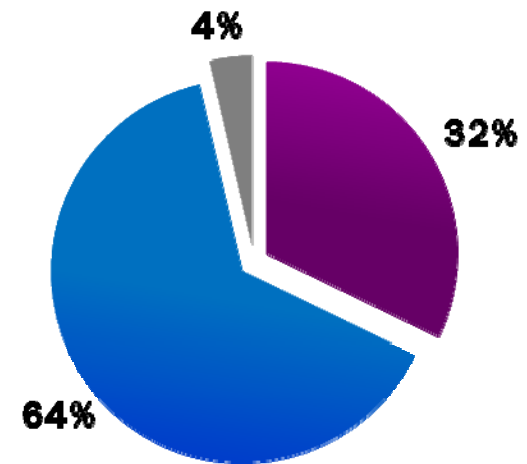
73% - creative agency currently takes the lead. 41% believe that will change

27% - media agency currently takes the lead. 32% believe that will change

Creative agency currently lead



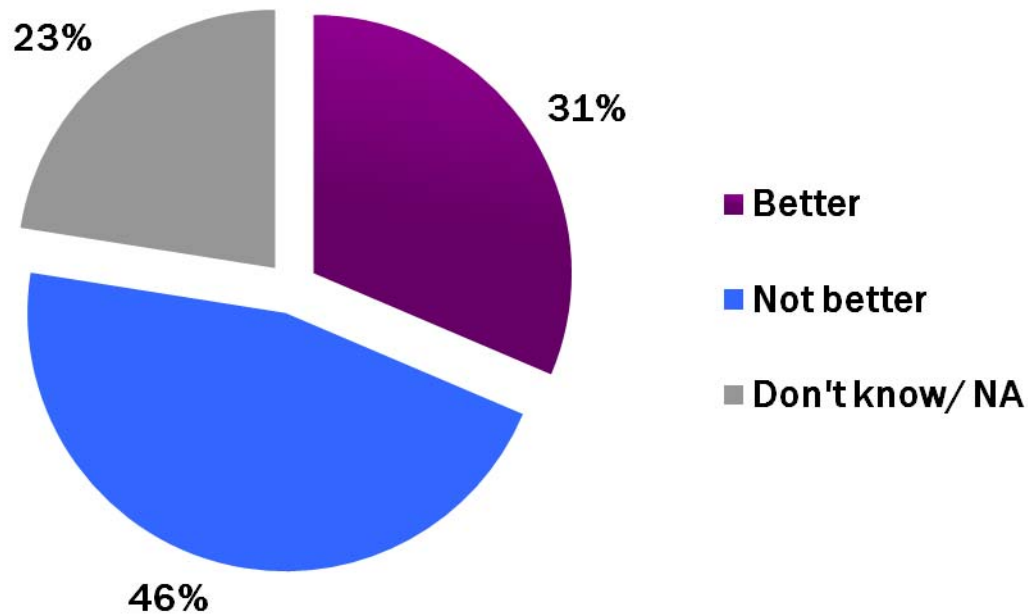
Media agency currently lead



Digital Agency Engagement



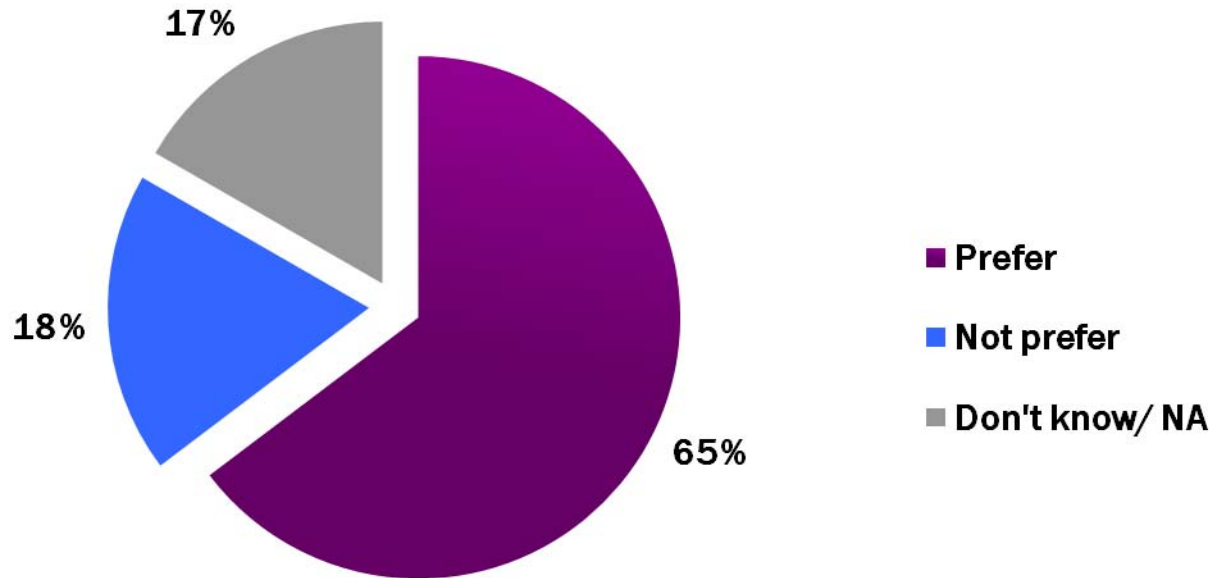
31% of marketers think their creative agency is better equipped to handle their digital needs than their media agency



Digital Agency Engagement



65% of clients would prefer to use a specialist digital agency than either of their current creative/ media agency.



Barriers to Increased Digital Spend



44% of advertisers cite lack of ROI understanding or measurement as the biggest barrier to increasing budget for digital marketing

