



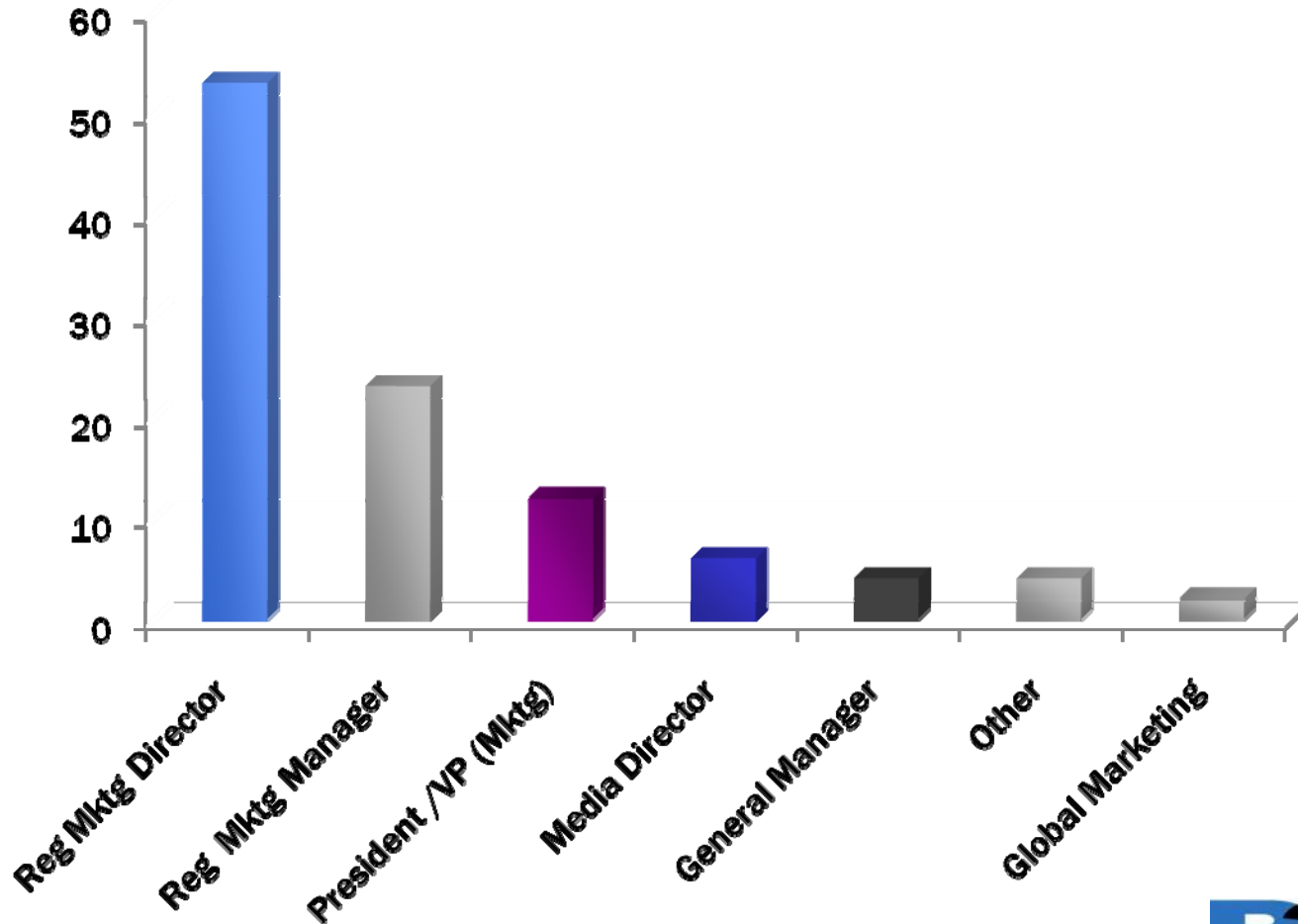
Regional Agency Scope 2009

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

Methodology



Respondents were key marketing decision makers

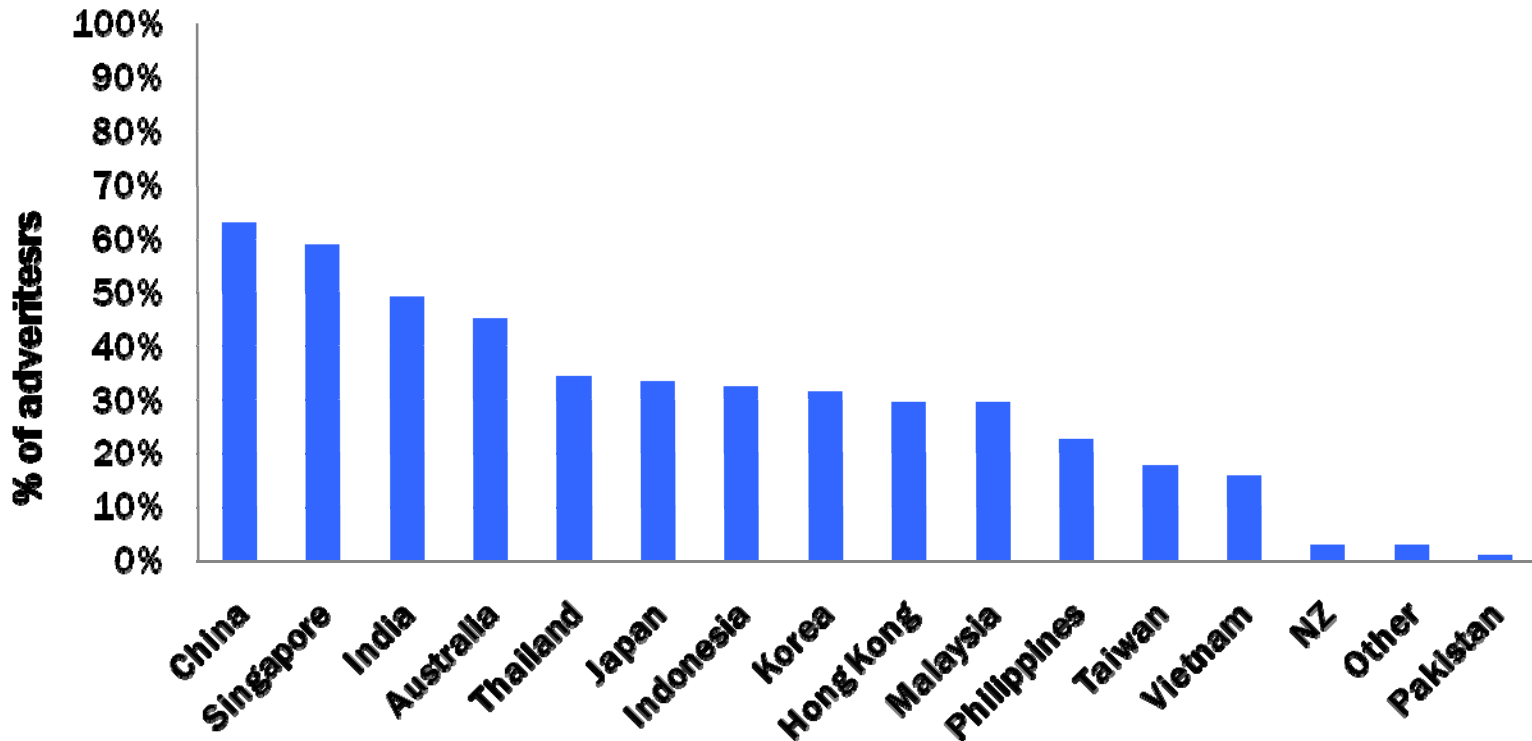


Methodology



Respondents' had a remit of 3+ Asian markets.

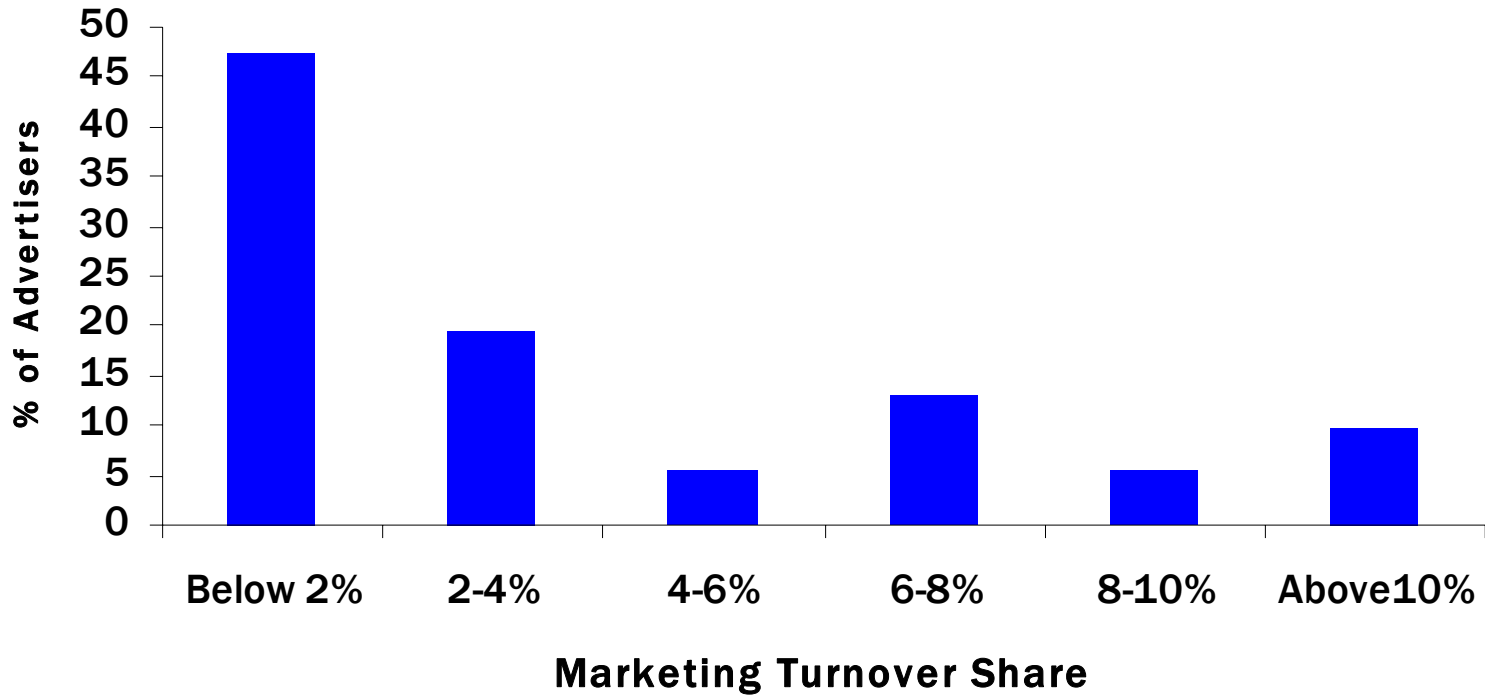
79% managed either one of China or India



Methodology



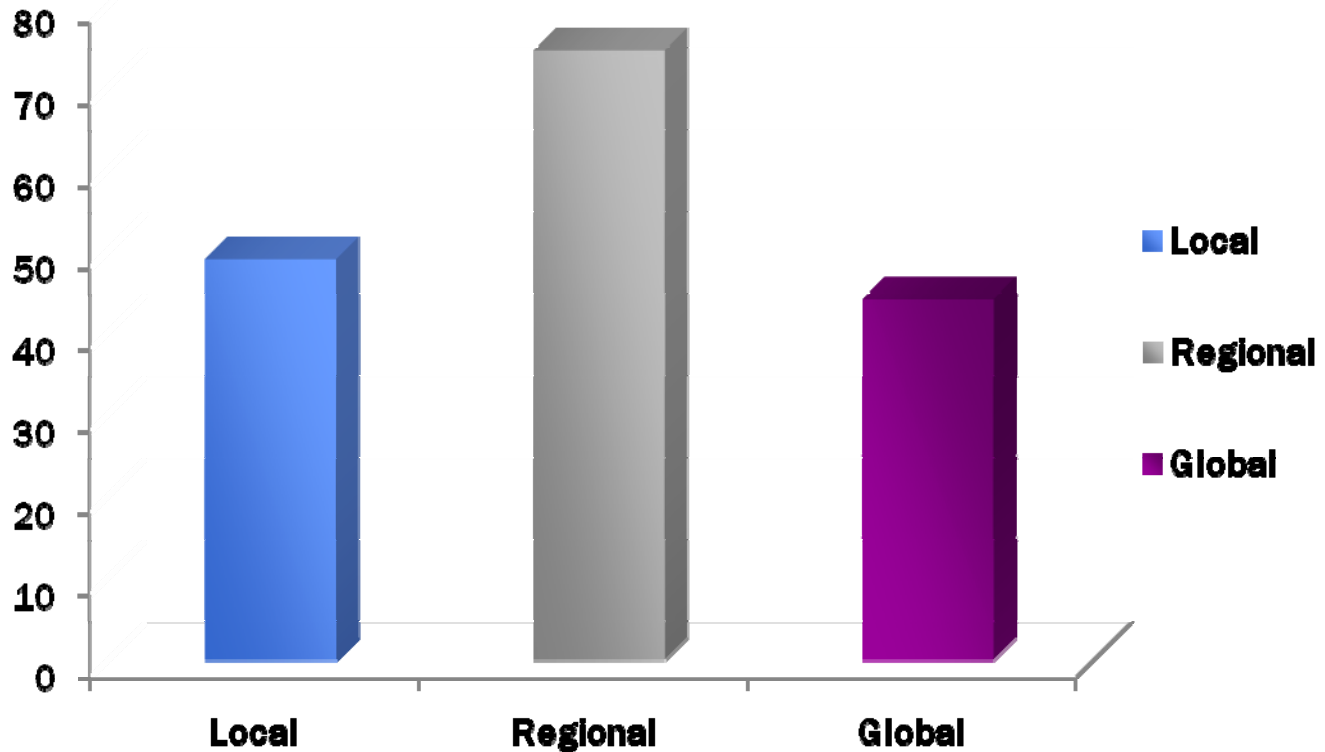
The average marketing turnover share of companies interviewed was 3.9%



Regional Working Trends: Original Communication Development

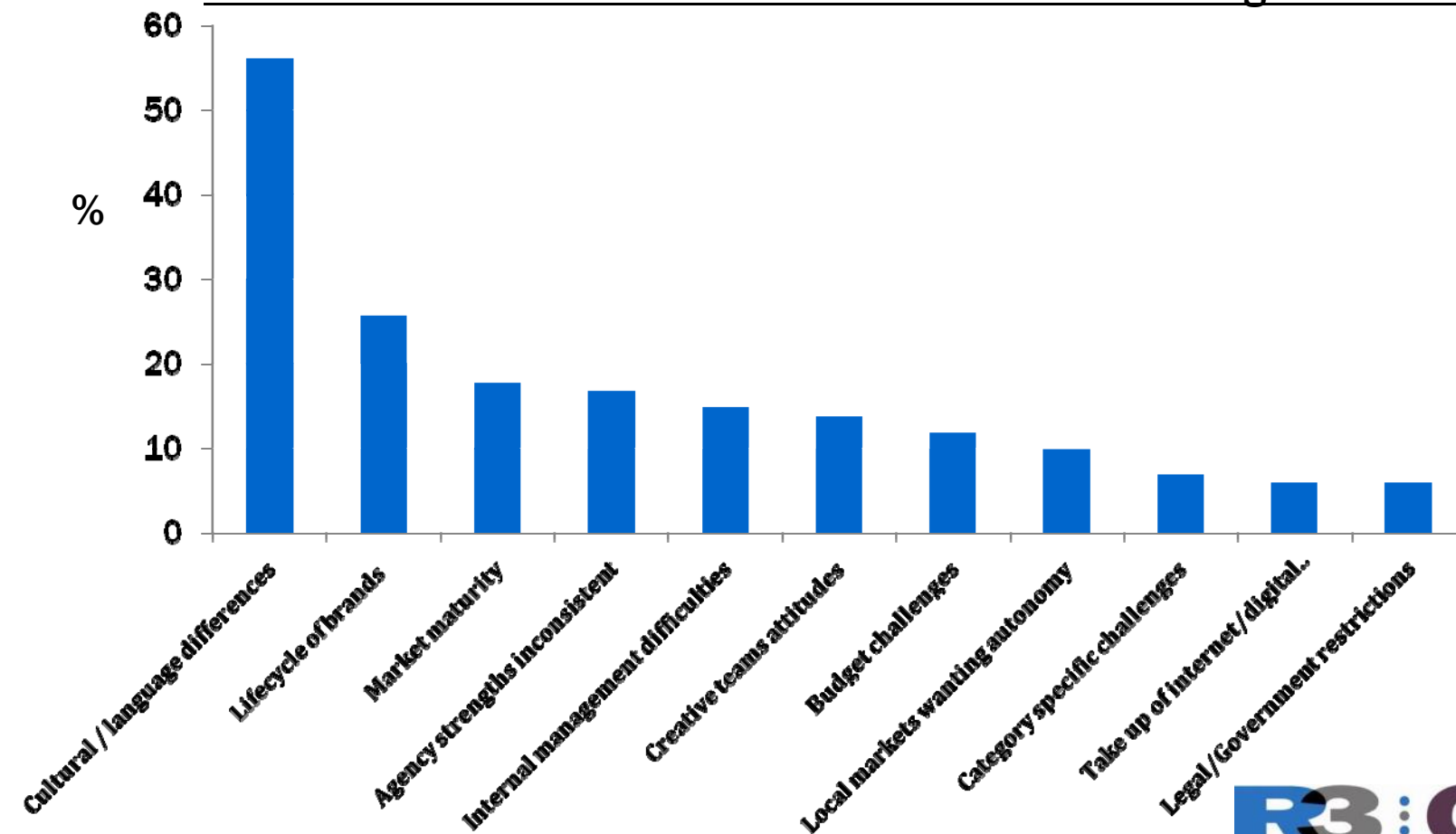


Original communication work is mostly developed at a regional level.



Regional Working Trends: Barriers for Regional Marketers

The biggest challenges in creating effective work are cultural and language differences. Inconsistent agency strengths cited by 17% of respondents; a further 14% cited difficulties with creative teams working with others.

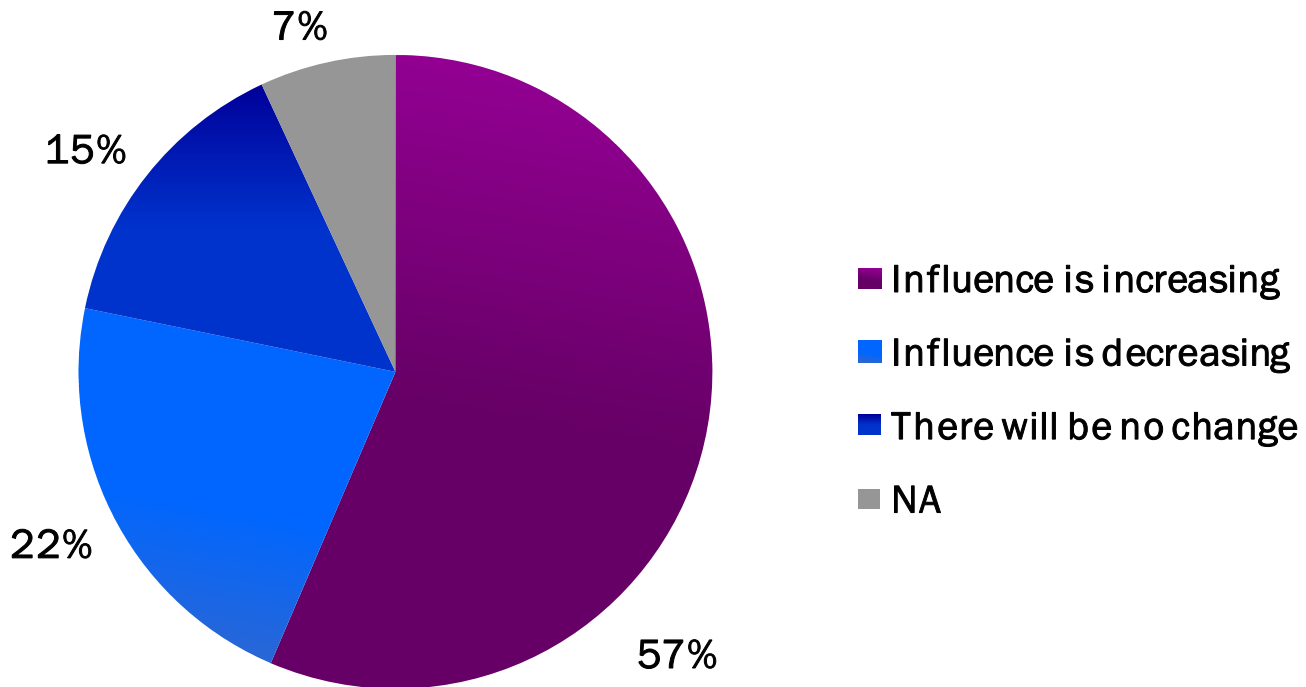


Base: 102 clients, multiple responses

Regional Working Trends: Influence of Regional Marketing



57% of regional marketers believe that the role and influence of regional marketing is on the rise



Pitch Behaviour: Regional role

Creative and media pitches are more frequently held on a global basis
amongst regional clients, digital is most commonly held by local- markets

