



# Quantitative B2B Research Report

## AdMarket Study 2014

### The Media Section

February - May 2014

Prepared for:



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## METHODOLOGY

▣ CENTRAL AIM of the research was to assess the „current state of affairs” of the Advertising Community in Romania on three of its main branches: Media, Digital and ATL.

This aim was attained by measuring key relevant parameters within the following dimensions:

- A Perception elements – or how is the main corpus of Clients perceiving the active entities from the Advertising Community: i.e. awareness, “usage”, satisfaction, key traits etc.
- B Usage and attitudes elements – what are the key working habits of the Clients into what regards collaboration with companies within the Advertising Community: i.e. criteria for agency selection, motives to cease collaboration, pitch habits, budgets etc.
- C Participant company relevant descriptors – e.g. active market domains / industry branch, turnover, number of active brands etc.

☰ Please note that this report focuses on the Media branch of the Advertising Community.

## RESEARCH DESIGN

### **Methodology:**

Business to Business approach, semi-structured interview, deployed face to face (PAPI) by field executives using a custom made printed questionnaire

**Category:** relevant data incumbents from companies that have been clients for the Media Advertising Agencies

### **INSTRUMENT**

Custom made questionnaire focused on Media Agencies build to measure all elements established as objectives.

The questionnaire has 26 items. Average interview duration on this questionnaire (media section only) was 15 minutes.

## SAMPLE

The participants were **114 individuals** in charge of the media communication activities in **99 commercial companies** that had had this type of activities in 2013.

The general approach to the sample universe was the following:

- we decided that all spenders on advertising media in 2013 are relevant
- we also decided that these spenders also needed to be active in 2013
- observing the criteria above from public and private sources we have compiled a list of companies

## DATA GATHERING

The field approach was a complex challenging B2B process:

- many of the relevant participants were either reluctant or simply lacked the time to involve in the study
- a significant part of the refusals to participate were not explicit and were masked behind typical “business” excuses
- both of the above meant that a large part of the initial universe sample list required at least 7 contact points (mails or phones) until a resolution was achieved
- furthermore even in those conditions the initial response rate was very low, bellow 10% so personal interventions from the research company seniors were needed to boost that figure

## DETAILED REPORTING

▾ In the following we present the key findings of the study.

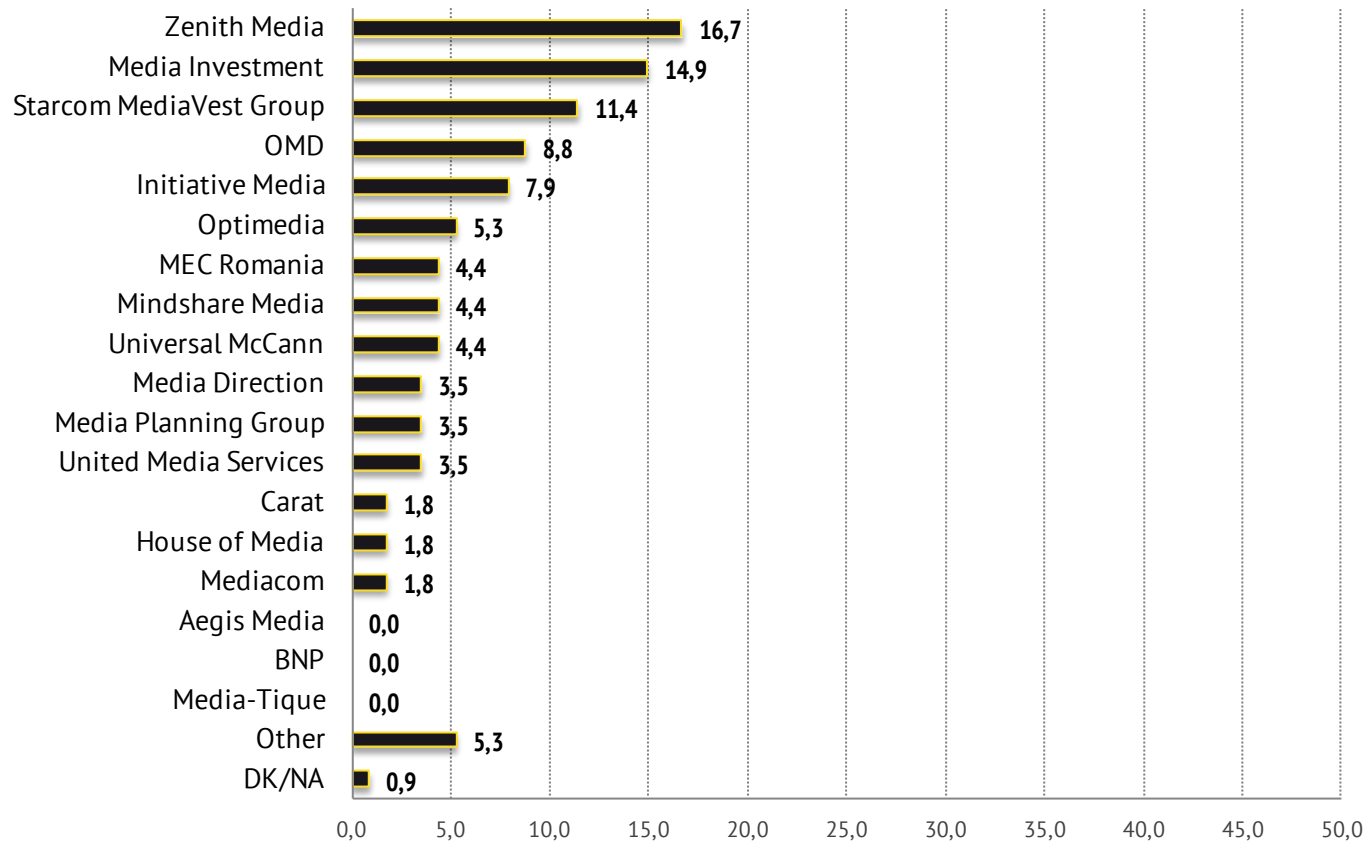
Reporting follows the questionnaire logic and structure and specifies for each graphic:

- the measured dimension
- the source question
- answer type
- total sample base used to compute percentages for that question
- measured percentages

### M1.1. MEDIA AGENCIES AWARENESS – TOP OF MIND



What are the media agencies that you can think of at the moment?

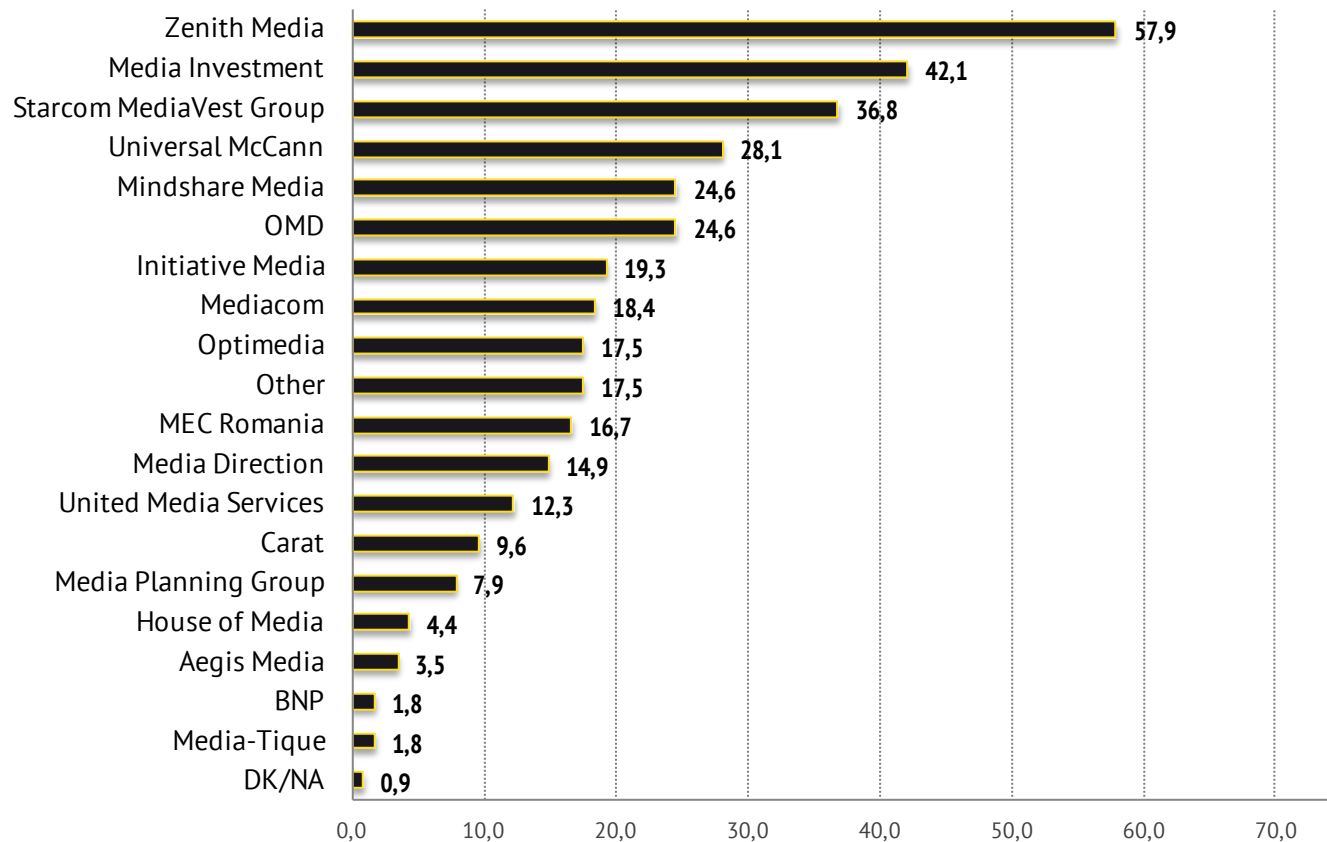


\*N=114, spontaneous single answer

## M1.2. MEDIA AGENCIES ALL UNPROMPTED AWARENESS



What other media agencies do you know or heard of?



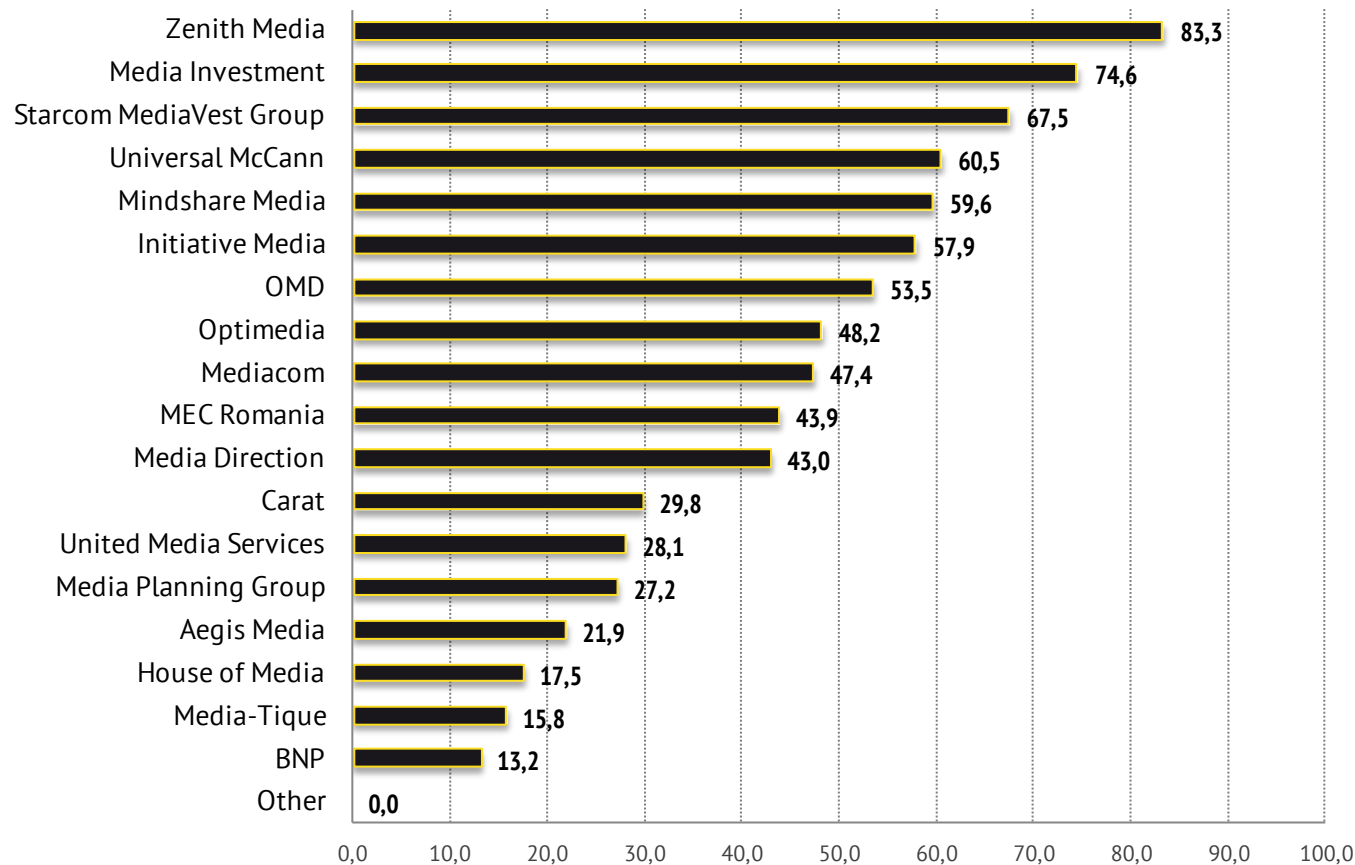
\*N=114, spontaneous multiple answer



### M1.3. MEDIA AGENCIES RECOGNITION



Which of the following media agencies do you know or heard of?

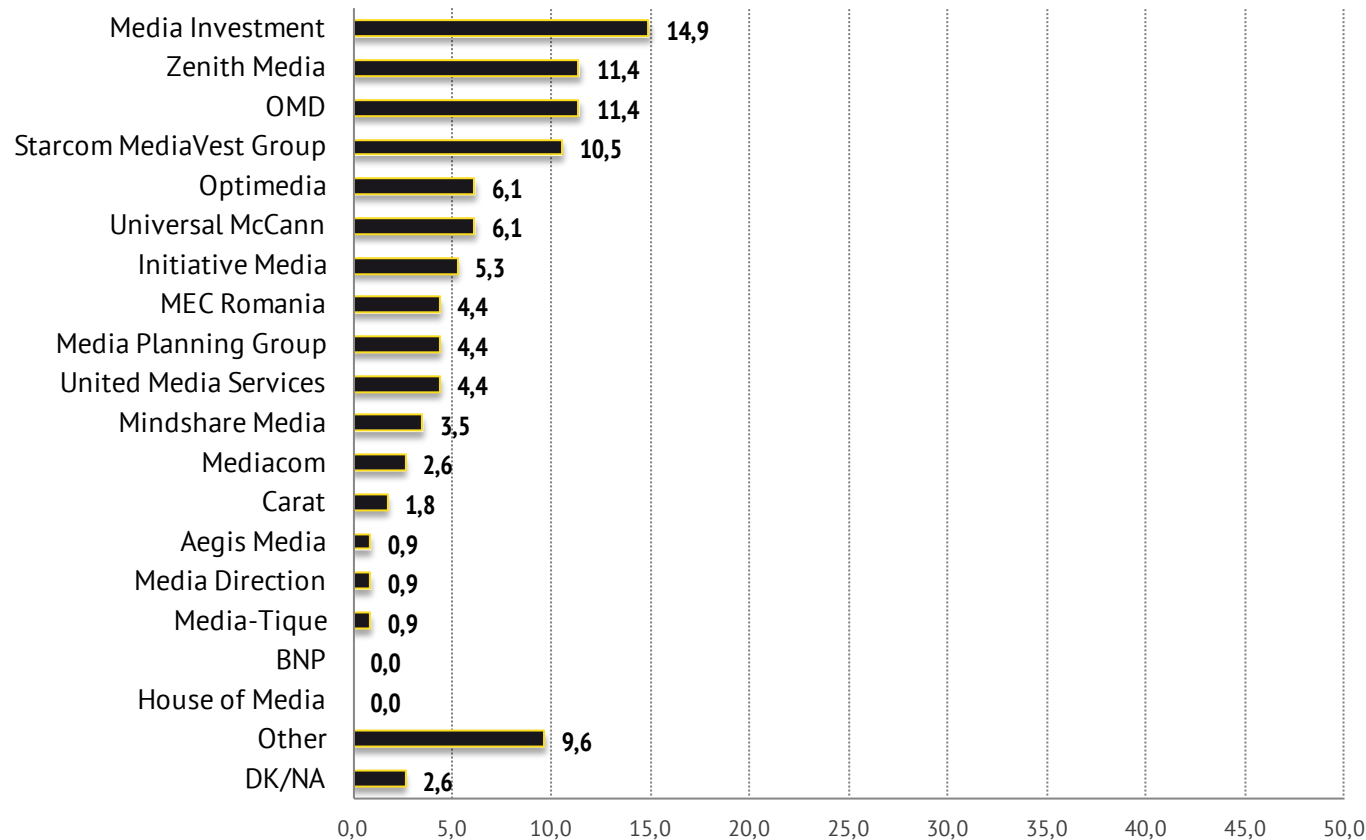


\*N=114, closed multiple answer

## M2.1. EMPLOYED AGENCIES: BUYING



Please name the media agencies which your company worked with in 2013

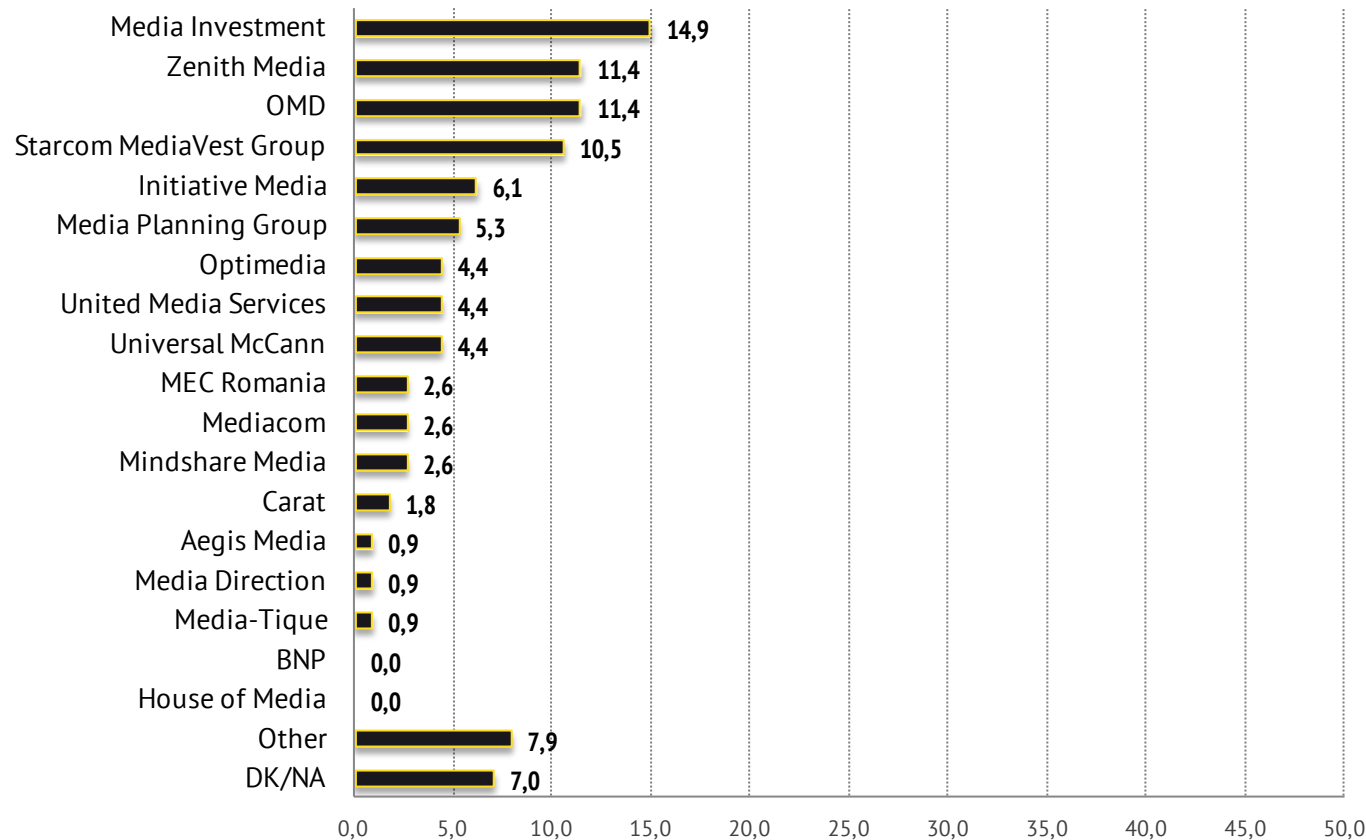


\*N=114, closed multiple answers

## M2.2. EMPLOYED AGENCIES: PLANNING



Please name the agencies which your company worked with in 2013

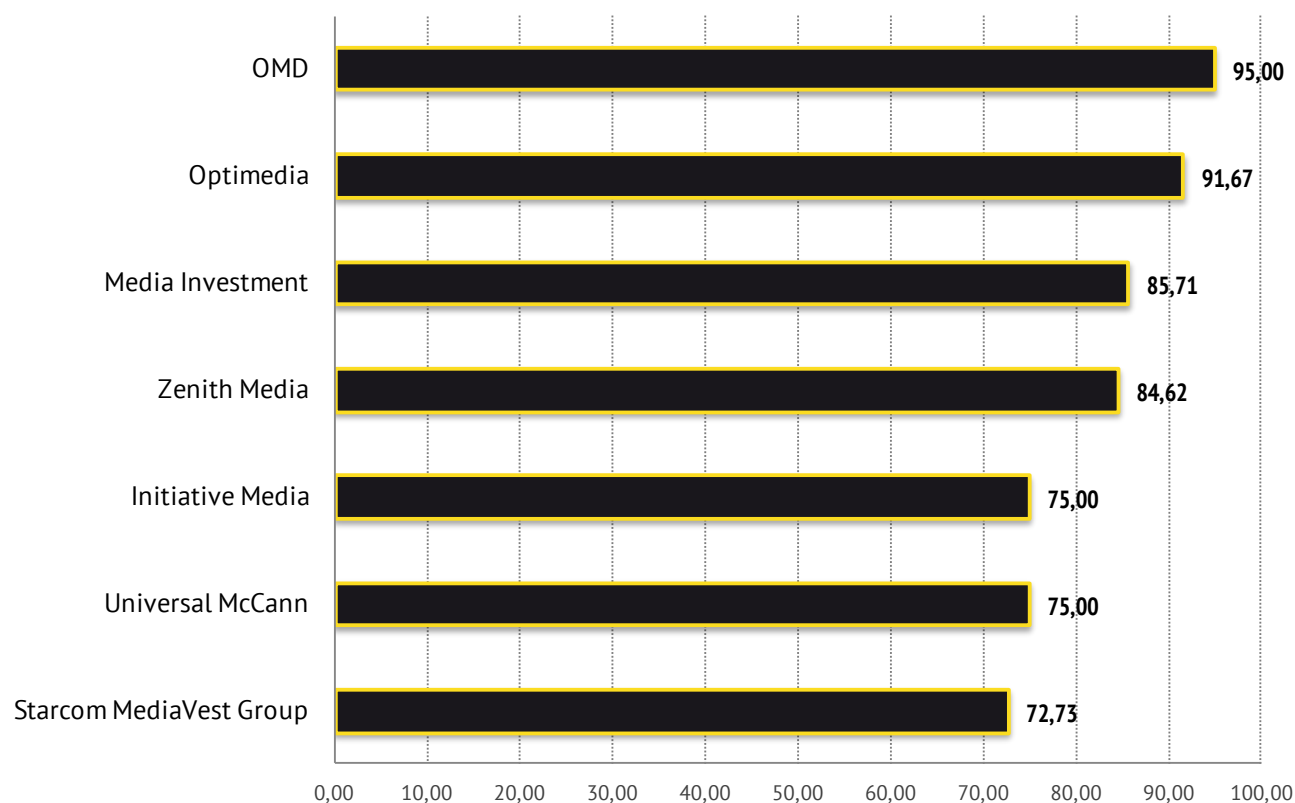


\*N=114, closed multiple answers

### M3. SATISFACTION WITH THE 2013 PERFORMANCE



On a scale from 1 to 5, how satisfied are you with the media agency you worked with in 2013?



\* the number of evaluations for each company are ranging between 15 evaluations for OMD and 6 evaluations for Initiative Media, Universal McCann and Starcom MediaVest Group; five point Likert type scale: 1 less satisfied ... 5 most satisfied

### M4. TOP 5 CRITERIA FOR ASSESSMENT OF MEDIA AGENCIES



Which of the following criteria are important when assessing a media agency?



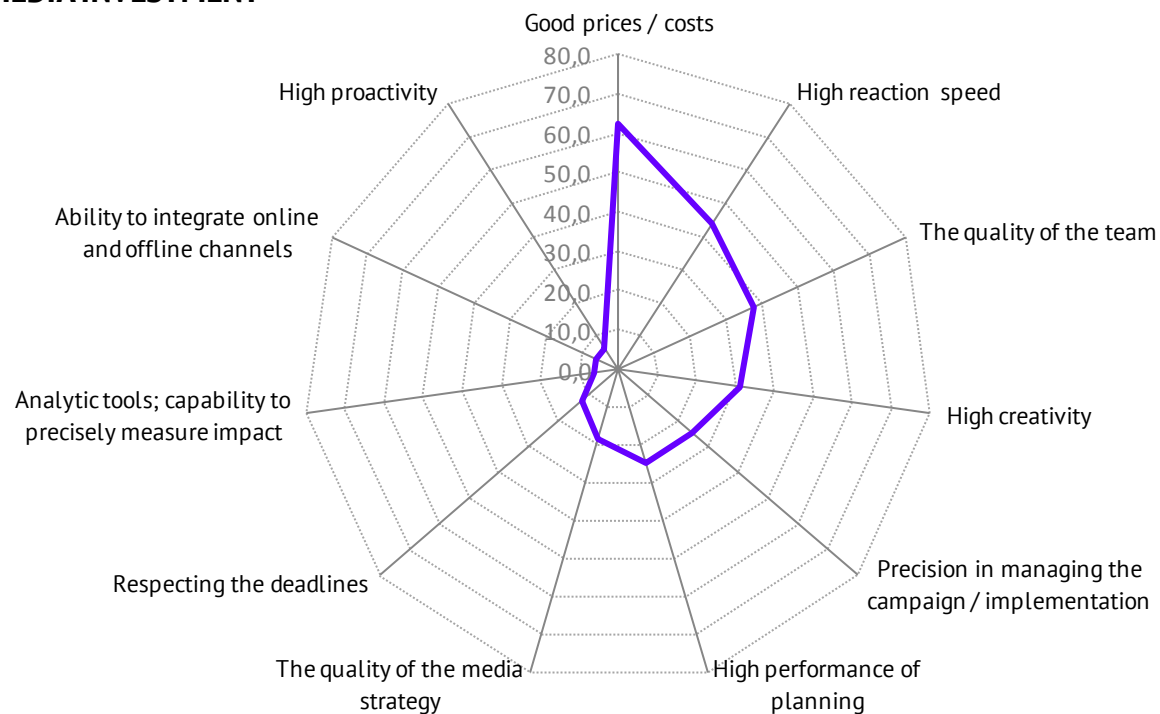
\*N=114, closed top 5 answers

## M5.1. TOP 3 STRENGTHS EMPLOYED MEDIA AGENCY



What are the top 3 strengths of the media agency you worked with in 2013?

### MEDIA INVESTMENT



\*N=16 participants that assessed the company, open top 3 answers  
\*strengths are spontaneously mentioned; values are percentages out of N

## M5.2. TOP 3 STRENGTHS EMPLOYED MEDIA AGENCY



What are the top 3 strengths of the media agency you worked with in 2013?

### ZENITH MEDIA



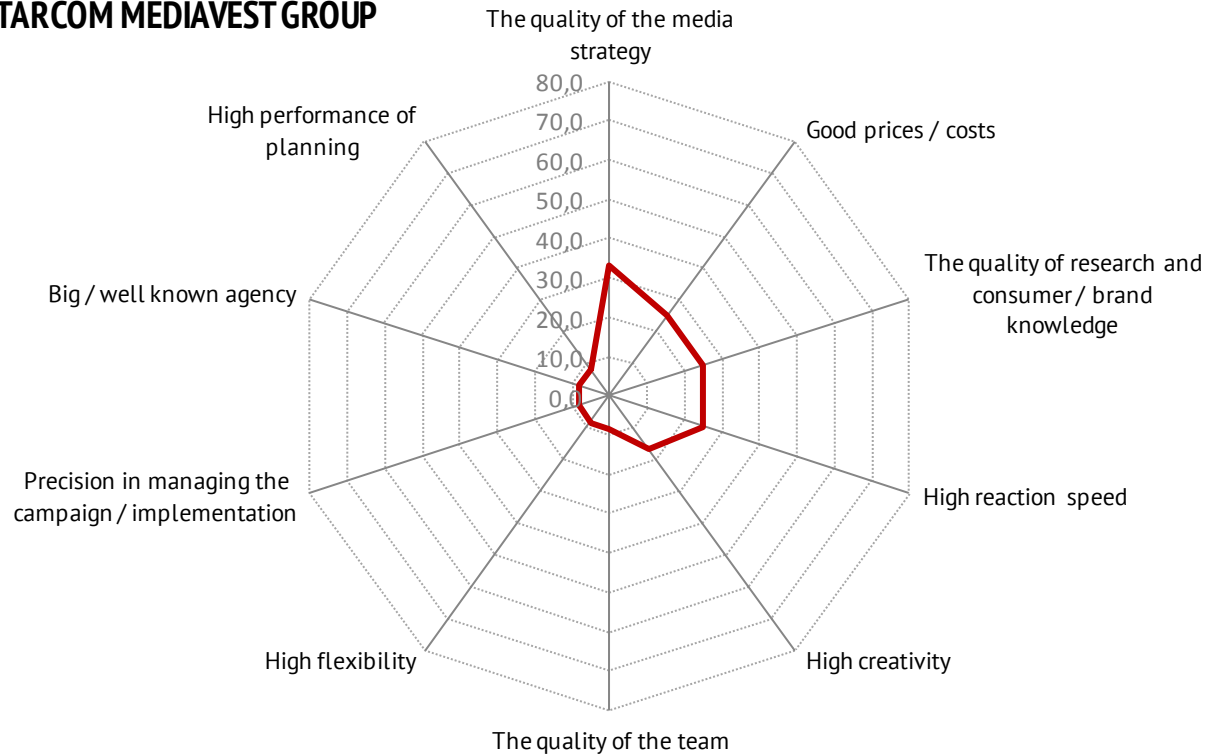
\*N=13 participants that assessed the company, open top 3 answers  
 \*strengths are spontaneously mentioned; values are percentages out of N

### M5.3. TOP 3 STRENGTHS EMPLOYED MEDIA AGENCY



What are the top 3 strengths of the media agency you worked with in 2013?

#### STARCOM MEDIAVEST GROUP



\*N=12 participants that assessed the company, open top 3 answers  
\*strengths are spontaneously mentioned; values are percentages out of N

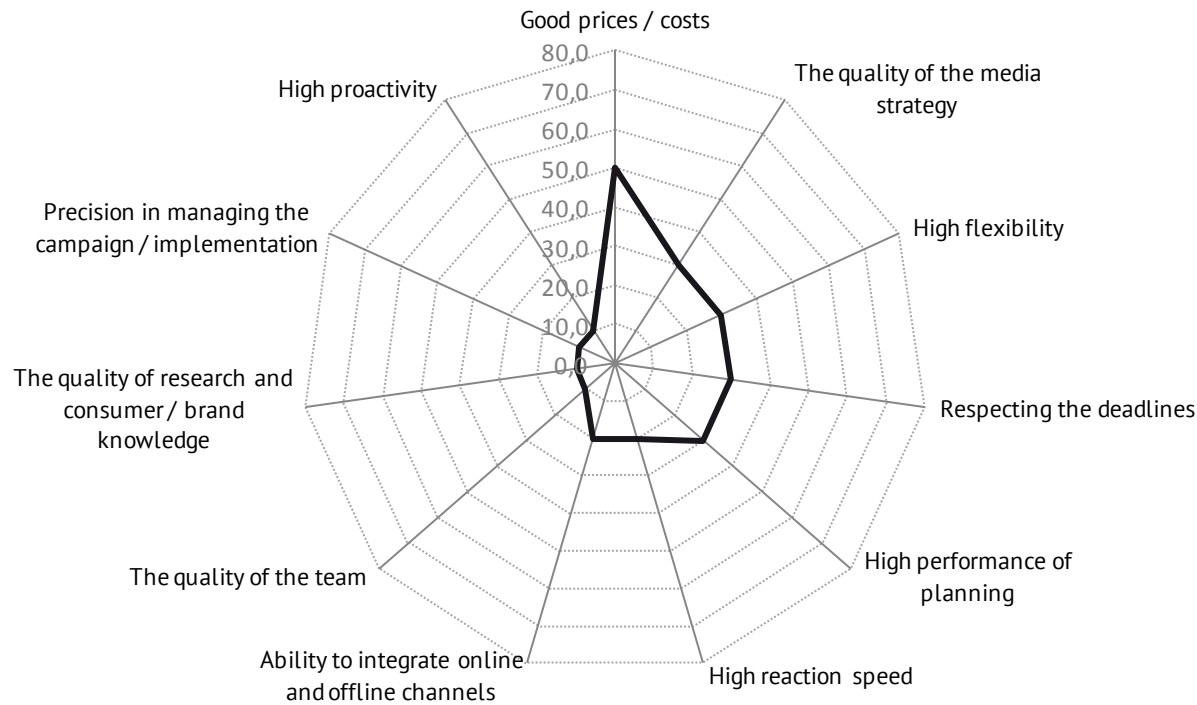


## M5.4. TOP 3 STRENGTHS EMPLOYED MEDIA AGENCY



What are the top 3 strengths of the media agency you worked with in 2013?

### OMD



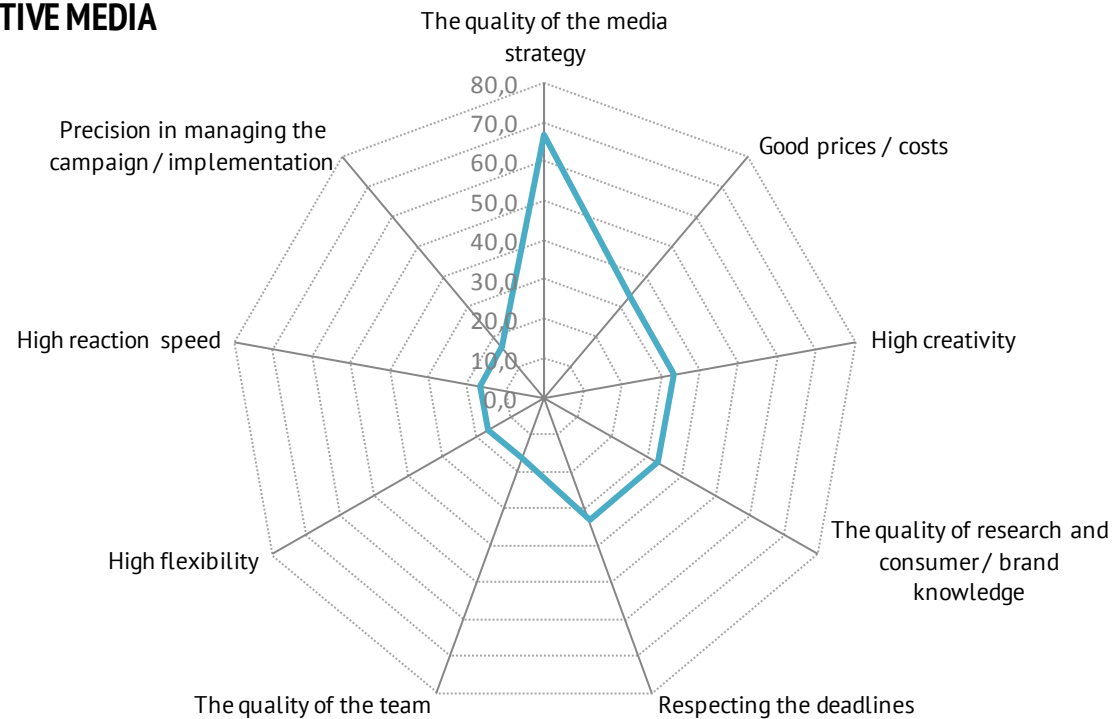
\*N=10 participants that assessed the company, open top 3 answers  
 \*strengths are spontaneously mentioned; values are percentages out of N

## M5.5. TOP 3 STRENGTHS EMPLOYED MEDIA AGENCY



What are the top 3 strengths of the media agency you worked with in 2013?

### INITIATIVE MEDIA



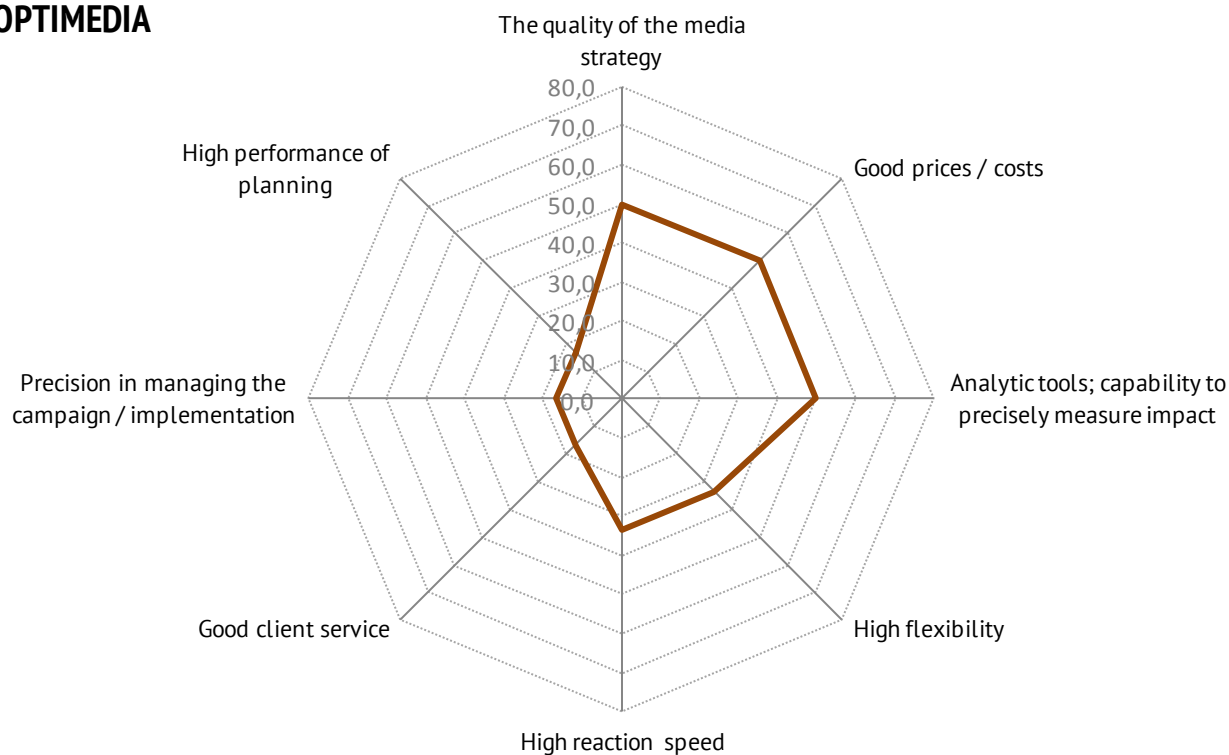
\*N=6 participants that assessed the company, open top 3 answers  
\*strengths are spontaneously mentioned; values are percentages out of N

## M5.6. TOP 3 STRENGTHS EMPLOYED MEDIA AGENCY



What are the top 3 strengths of the media agency you worked with in 2013?

### OPTIMEDIA



\*N=6 participants that assessed the company, open top 3 answers

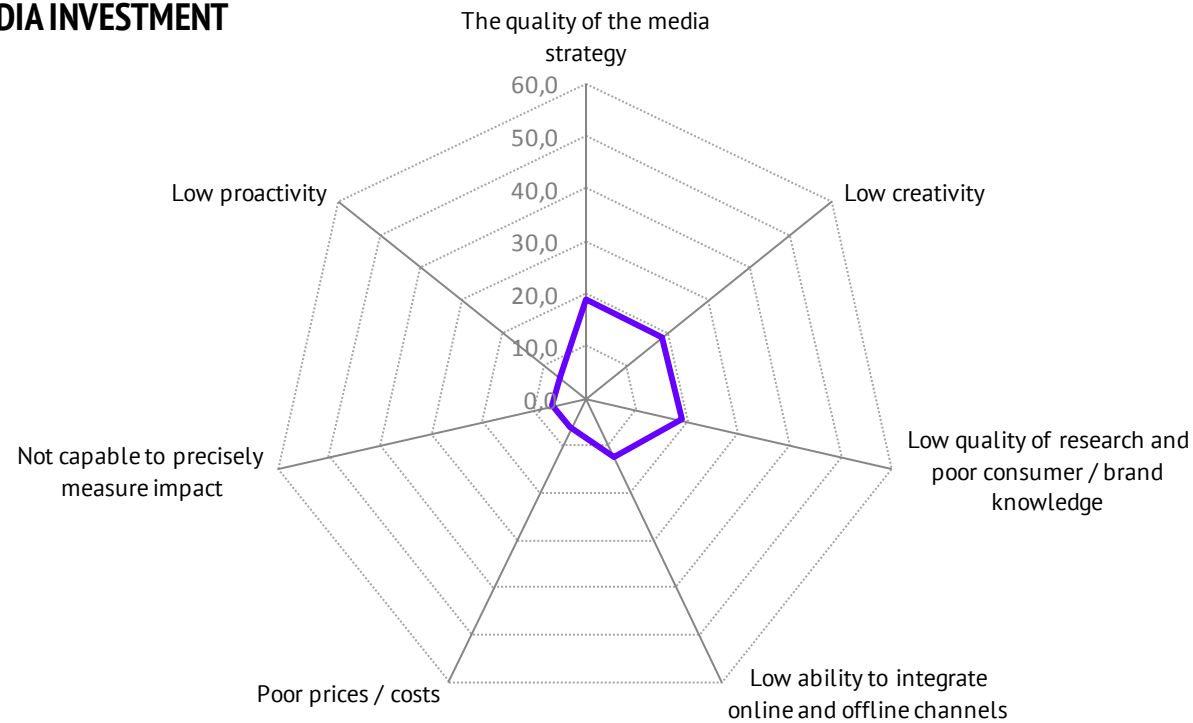
\*strengths are spontaneously mentioned; values are percentages out of N

## M6.1. TOP 3 WEAKNESSES EMPLOYED MEDIA AGENCY



What are the top 3 weaknesses of the media agency you worked the most in 2013?

### MEDIA INVESTMENT



\*N=16 participants that assessed the company, open top 3 answers  
\*weaknesses are spontaneously mentioned; values are percentages out of N

## M6.2. TOP 3 WEAKNESSES EMPLOYED MEDIA AGENCY



What are the top 3 weaknesses of the media agency you worked the most in 2013?

### ZENITH MEDIA



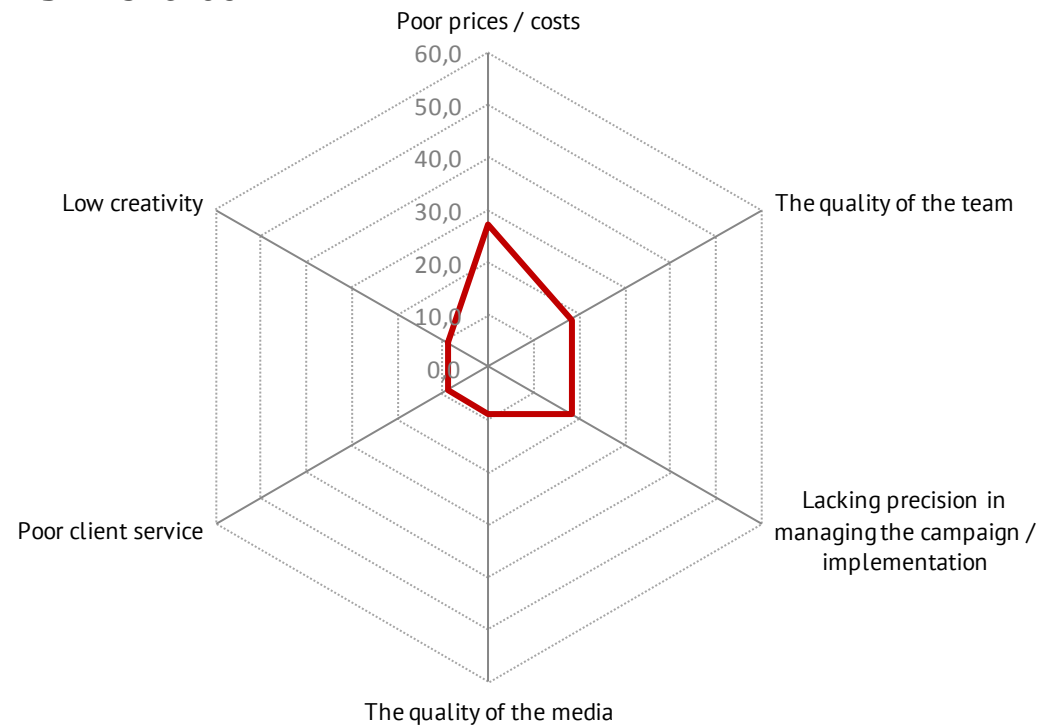
\*N=13 participants that assessed the company, open top 3 answers  
 \*weaknesses are spontaneously mentioned; values are percentages out of N

## M6.3. TOP 3 WEAKNESSES EMPLOYED MEDIA AGENCY



What are the top 3 weaknesses of the media agency you worked the most in 2013?

### STARCOM MEDIAVEST GROUP



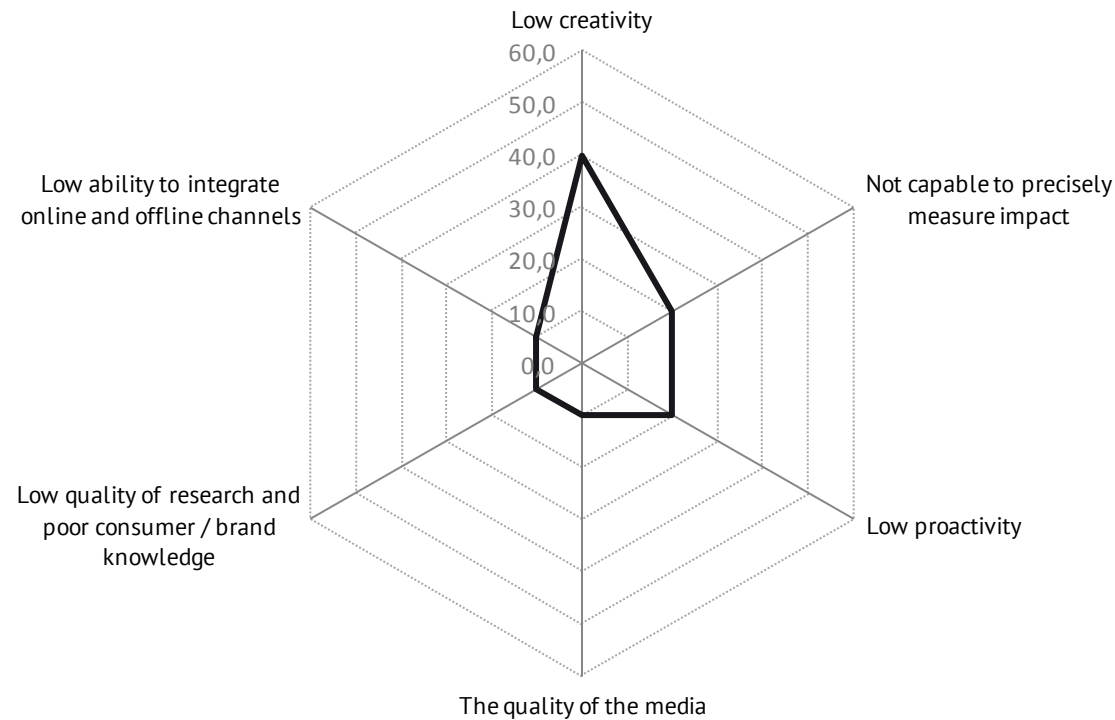
\*N=11 participants that assessed the company, open top 3 answers  
\*weaknesses are spontaneously mentioned; values are percentages out of N

## M6.4. TOP 3 WEAKNESSES EMPLOYED MEDIA AGENCY



What are the top 3 weaknesses of the media agency you worked the most in 2013?

### OMD



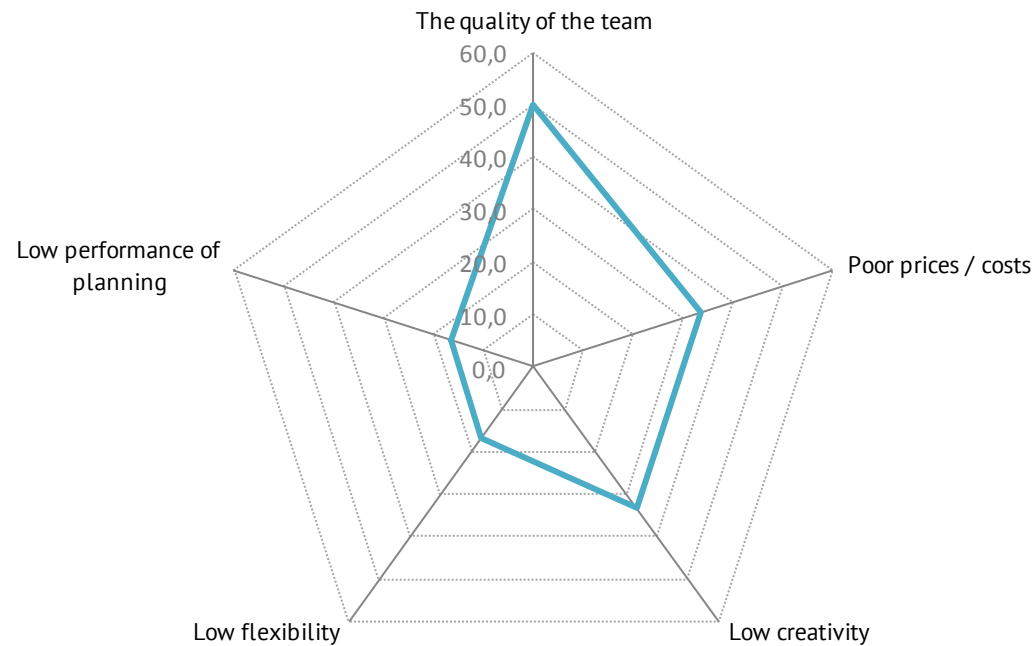
\*N=10 participants that assessed the company, open top 3 answers  
 \*weaknesses are spontaneously mentioned; values are percentages out of N

## M6.5. TOP 3 WEAKNESSES EMPLOYED MEDIA AGENCY



What are the top 3 weaknesses of the media agency you worked the most in 2013?

### INITIATIVE MEDIA



\*N=6 participants that assessed the company, open top 3 answers  
\*weaknesses are spontaneously mentioned; values are percentages out of N

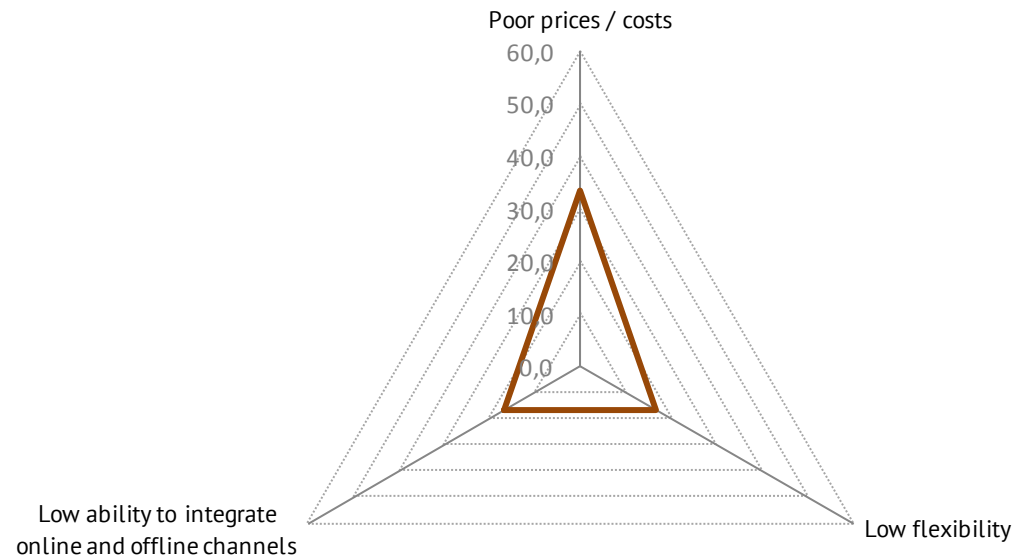


## M6.6. TOP 3 WEAKNESSES EMPLOYED MEDIA AGENCY



What are the top 3 weaknesses of the media agency you worked the most in 2013?

### OPTIMEDIA

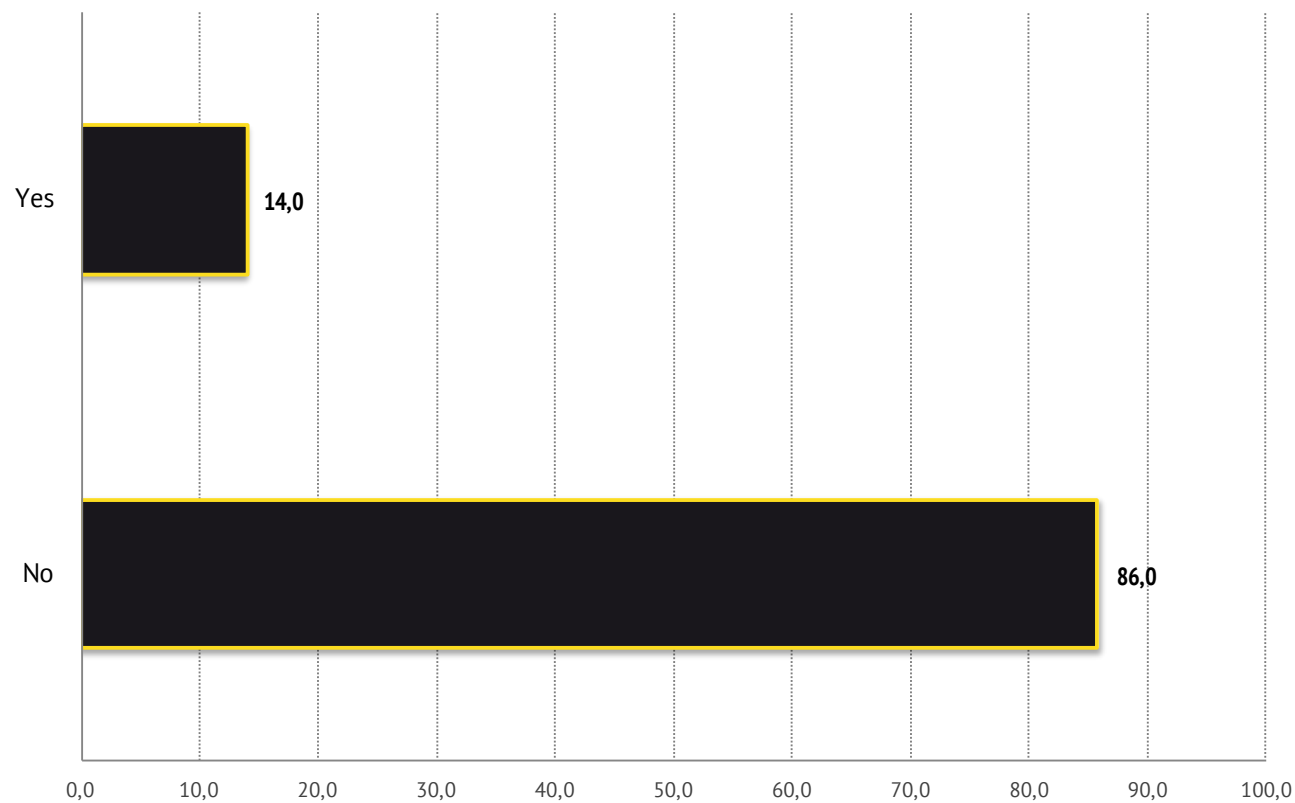


\*N=6 participants that assessed the company, open top 3 answers  
 \*weaknesses are spontaneously mentioned; values are percentages out of N

## M7. UNAVAILABLE MEDIA SERVICES



Are there media services that are not present in the market but that you would like to find in the media agency portfolio?



\*N=114, closed single answer

## M8. EXPECTED MEDIA SERVICES



Examples of inexistent media services in the market

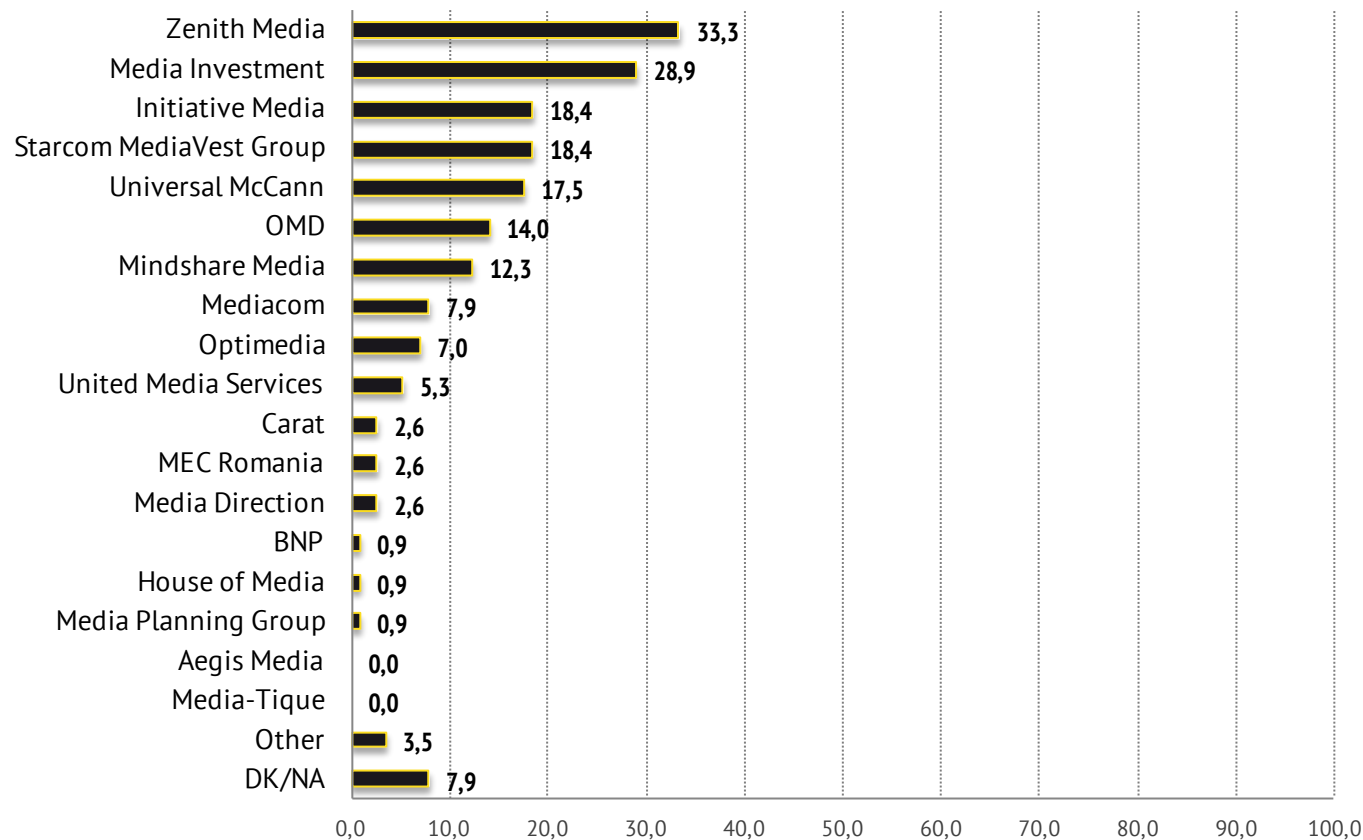
1. ADVANCED MEASUREMENT
2. ADVERTISING ON ONLINE MUSIC RADIOS
3. ADVERTISING ON STB (SETUP BOXES)
4. INTEGRATING IN THE ANALYSIS OF THE UNIQUE ONLINE AND OFFLINE VISITORS AND THEIR SEPARATION
5. MEASURING OUTDOOR AUDIENCES
6. MEASURING THE ONLINE EQUIVALENT OF GPRS
7. UNCONVENTIONAL MEDIA
8. MEDIA NECONVENTIONALA (PUTIN OFERTATA/INTELEASA)
9. GOOGLE SPECIAL PROJECTS
10. MOBILE ADVERTISING
11. AUGMENTED REALITY
12. ONLINE TV STREAMS / ADVERTISING

\*N=16, participants responding "yes" to the previous question, open multiple answers

## M9.1. BEST STRATEGIC PLANNING MEDIA AGENCY



In your opinion, which are the best media agencies in strategic planning?

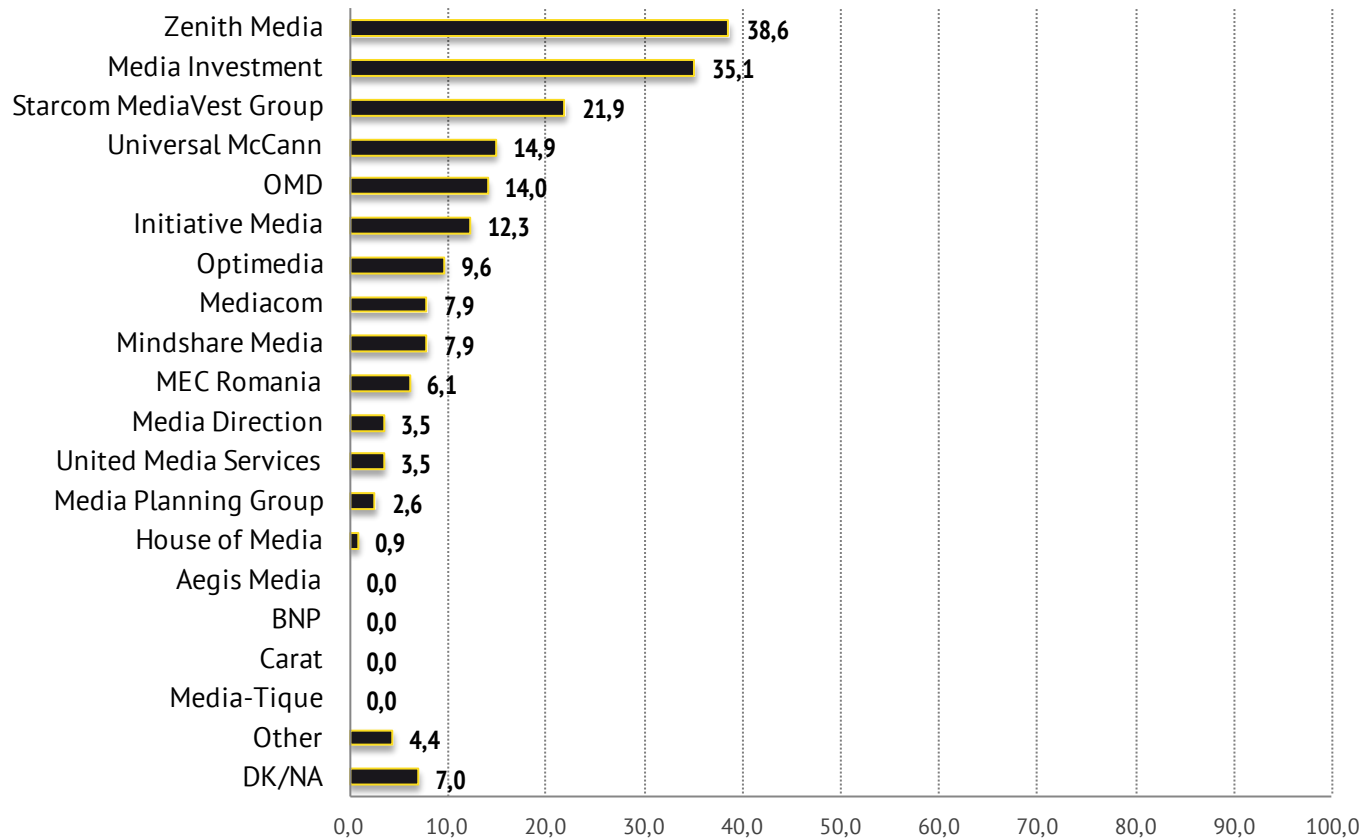


\*N=114, closed multiple answers

## M9.2. BEST MEDIA AGENCY ON BUYING



In your opinion, which are the best media agencies in media buying?

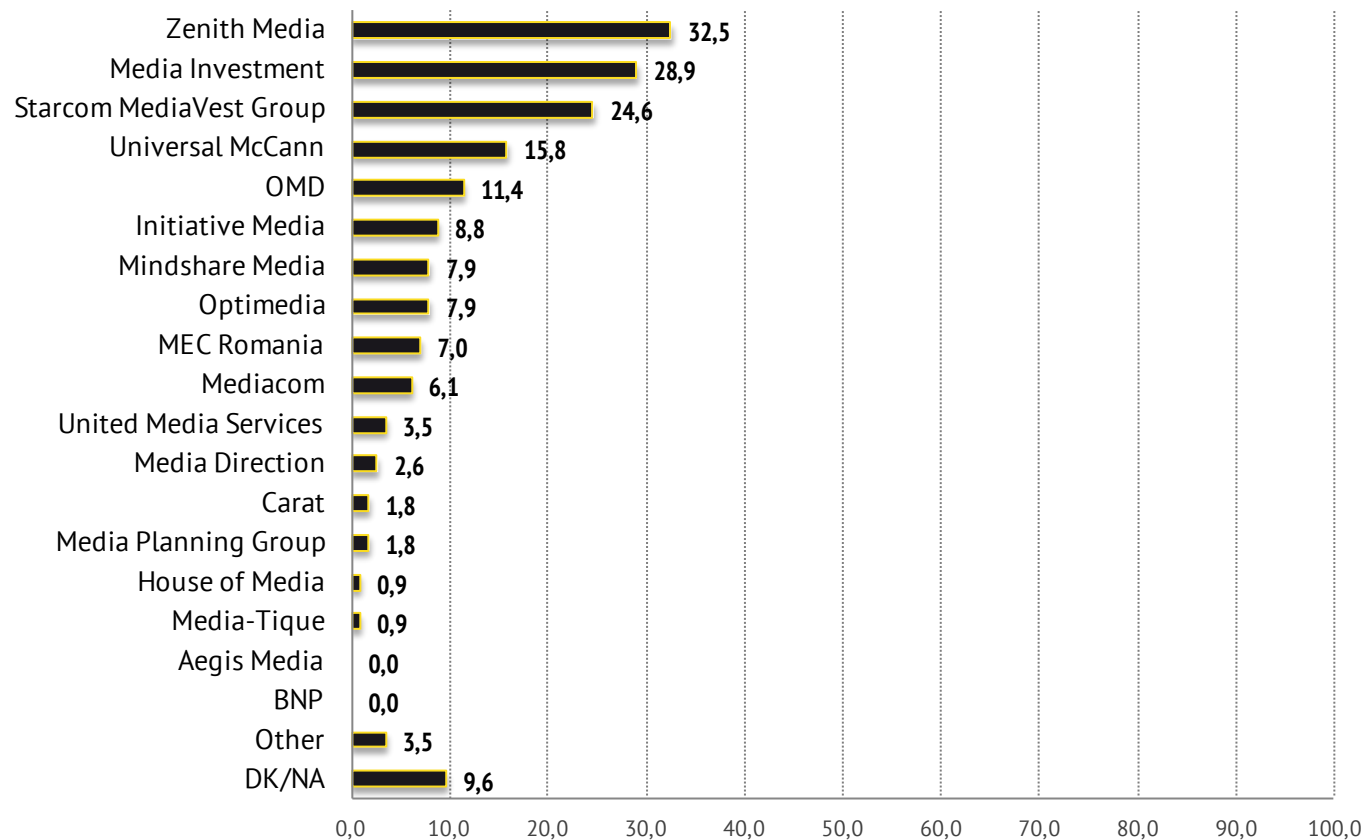


\*N=114, closed multiple answers

### M9.3. BEST CS/PROJECT MANAGEMENT MEDIA AGENCY



In your opinion, which are the best media agencies in client service / project management?

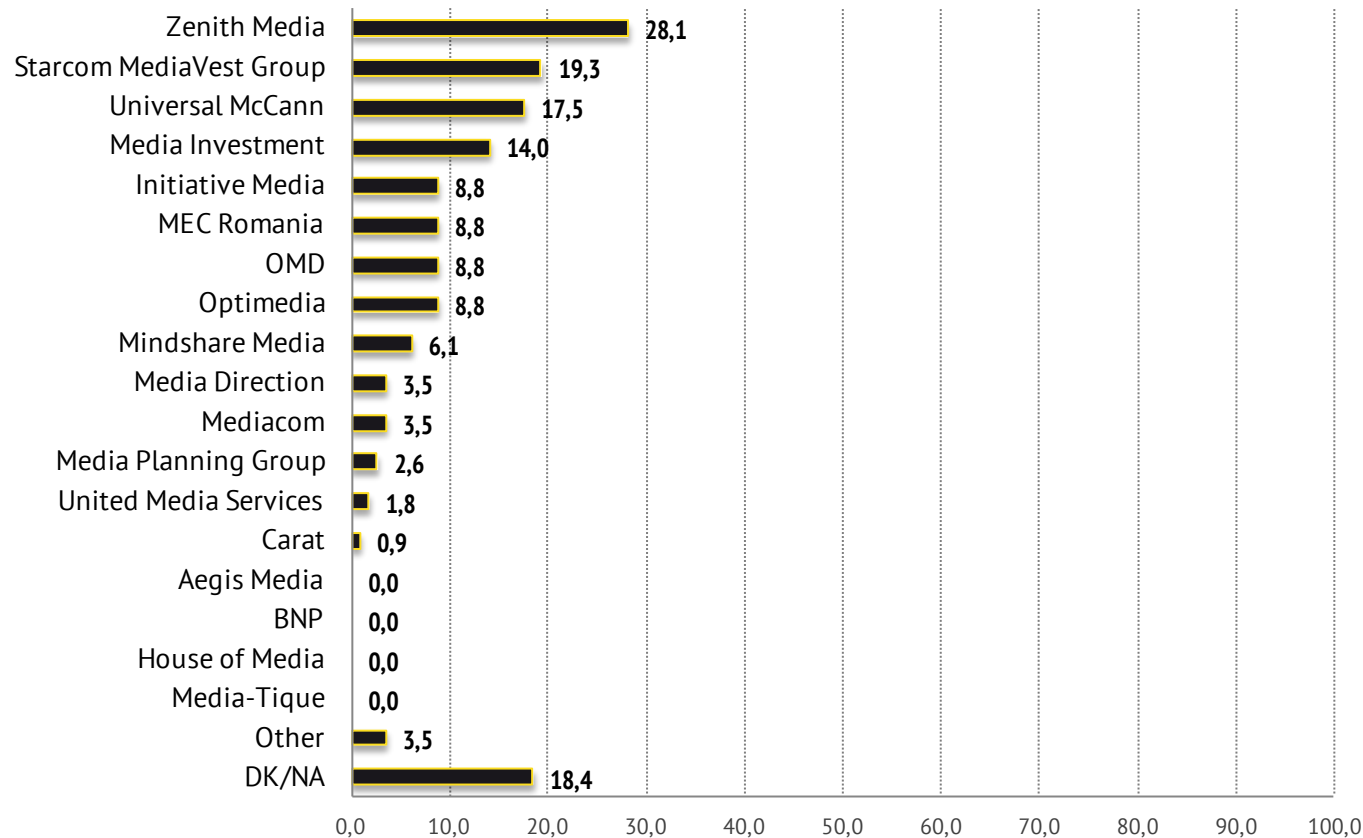


\*N=114, closed multiple answers

### M9.4. BEST MEDIA AGENCY AT DATA ANALITYCS



In your opinion, which are the best media agencies at data analytics?

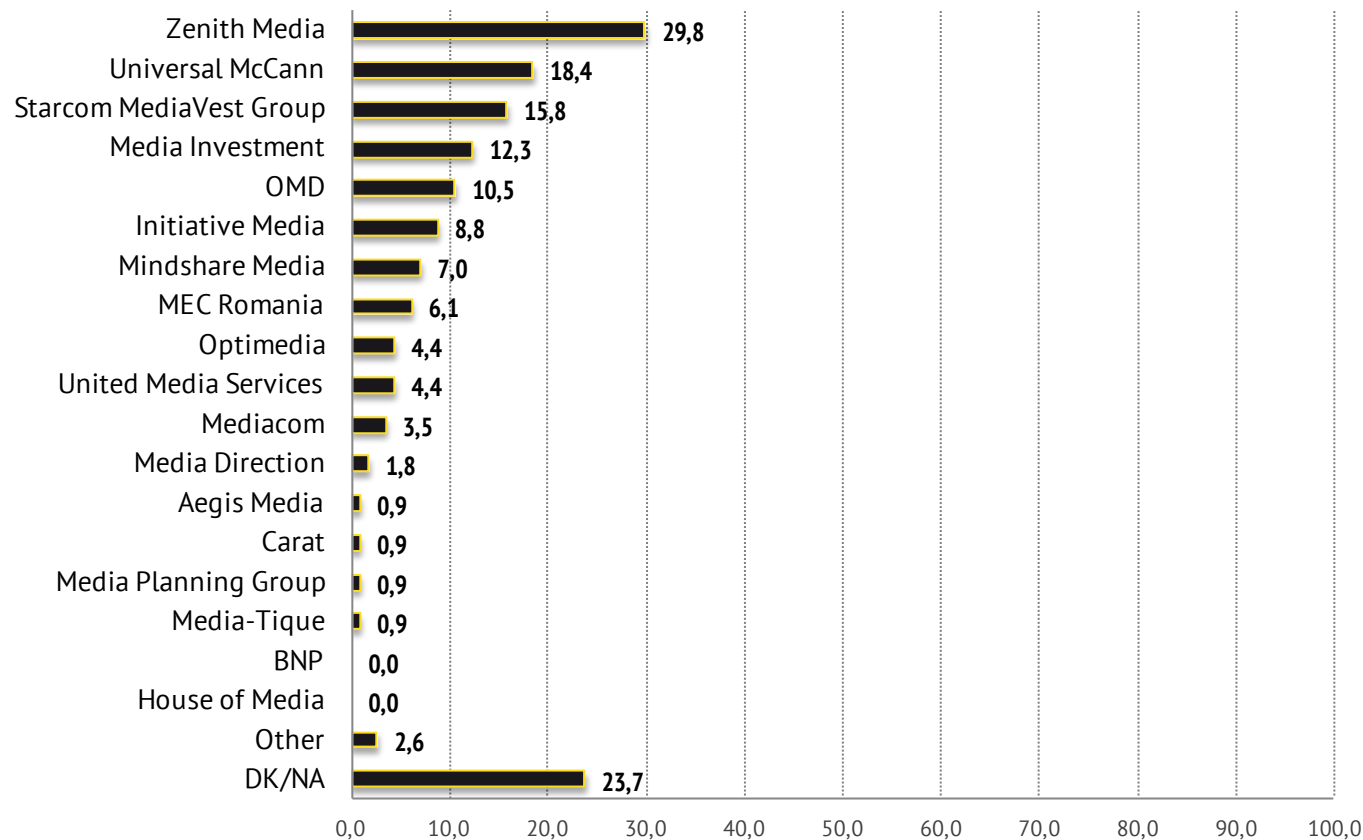


\*N=114, closed multiple answers

## M9.5. BEST AT OFFLINE-ONLINE INTEGRATION



In your opinion, which are the best media agencies at offline-online integration?



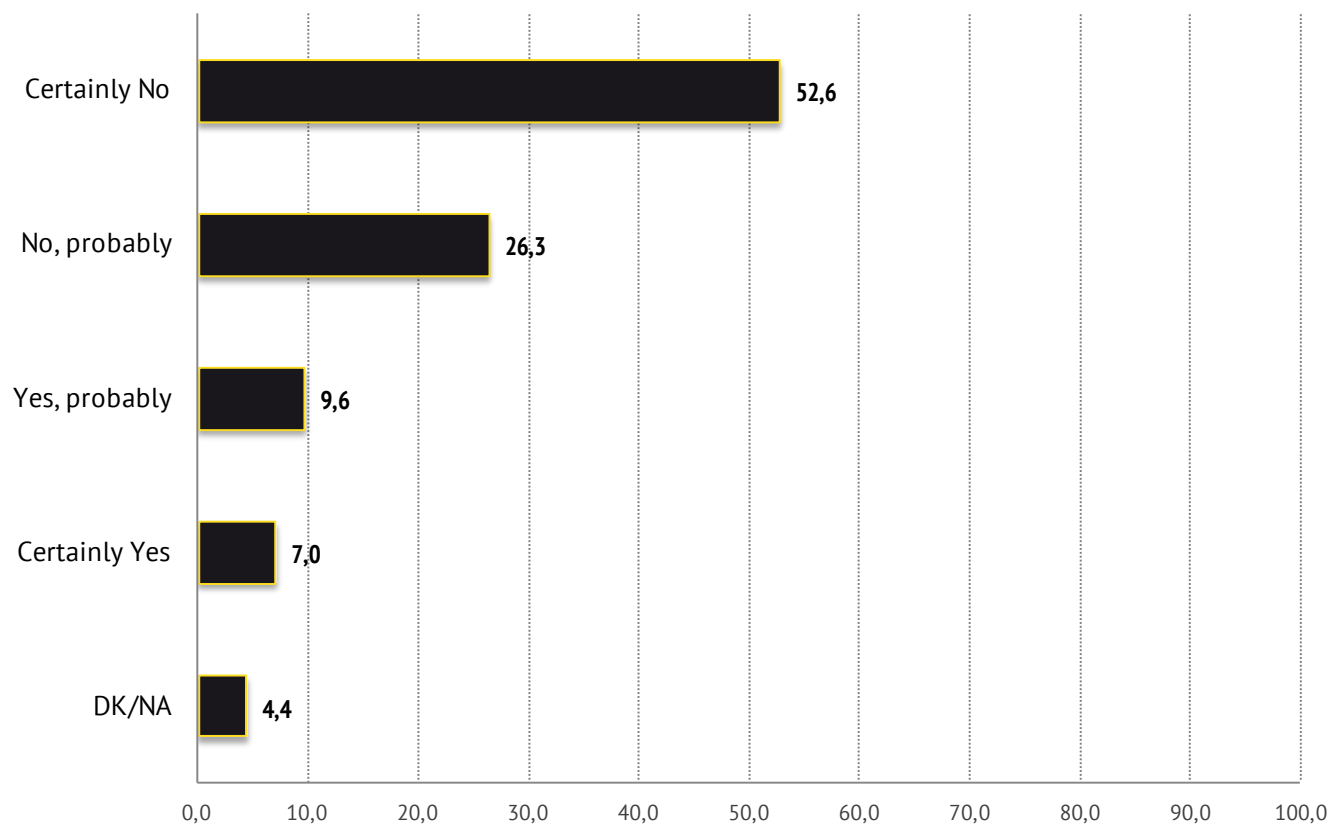
\*N=114, closed multiple answers



## M10. INTENTION TO SWITCH THE MEDIA AGENCY



In 2014 do you intent to change the media agency you worked with in 2013?

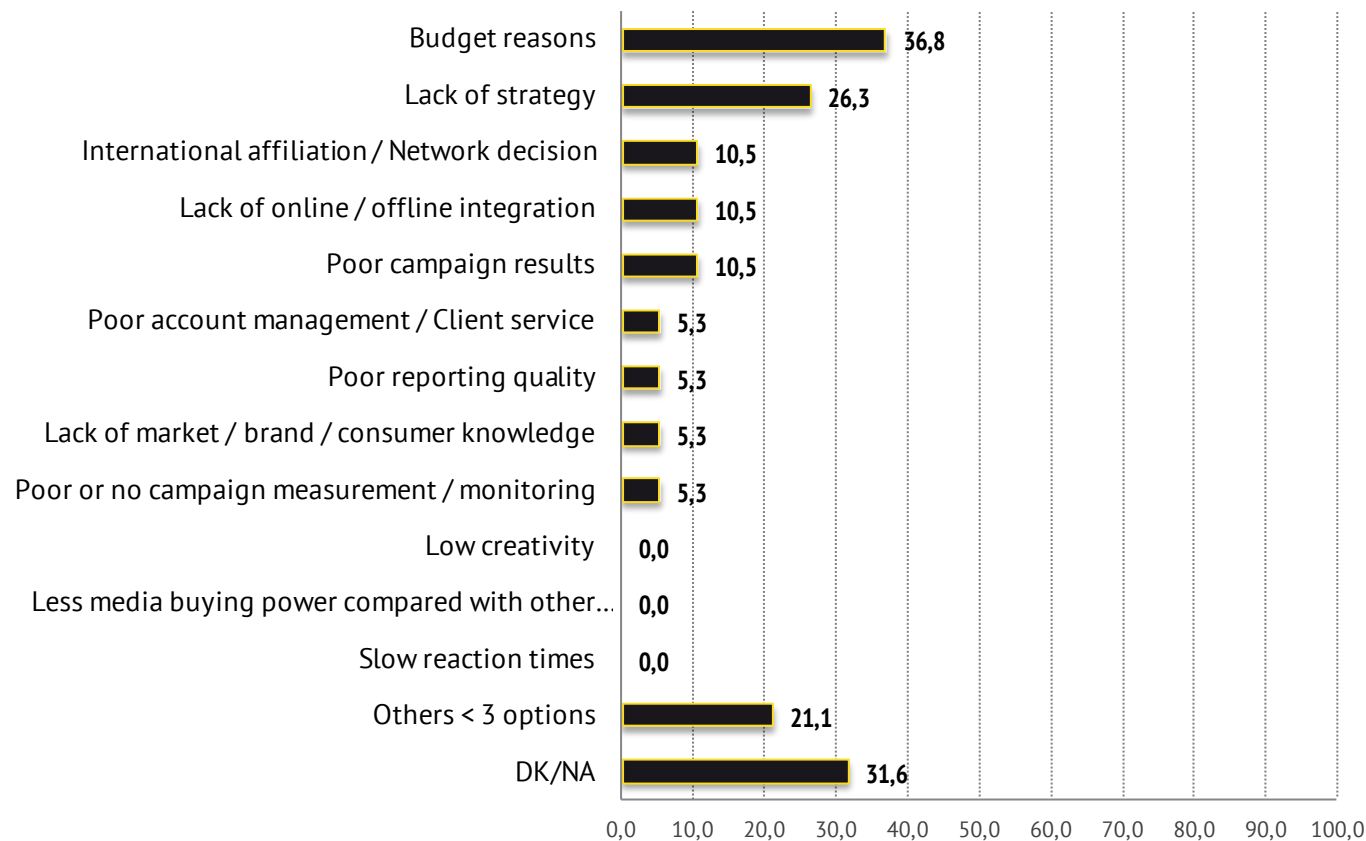


\*N=114, closed single answer

## M11. TOP 3 REASONS TO END THE COLLABORATION



What are the top 3 reasons if you were to end the relationship with a media agency?



\*N=19, participants responding “yes” or “probably yes” to the previous question, open top 3 answers

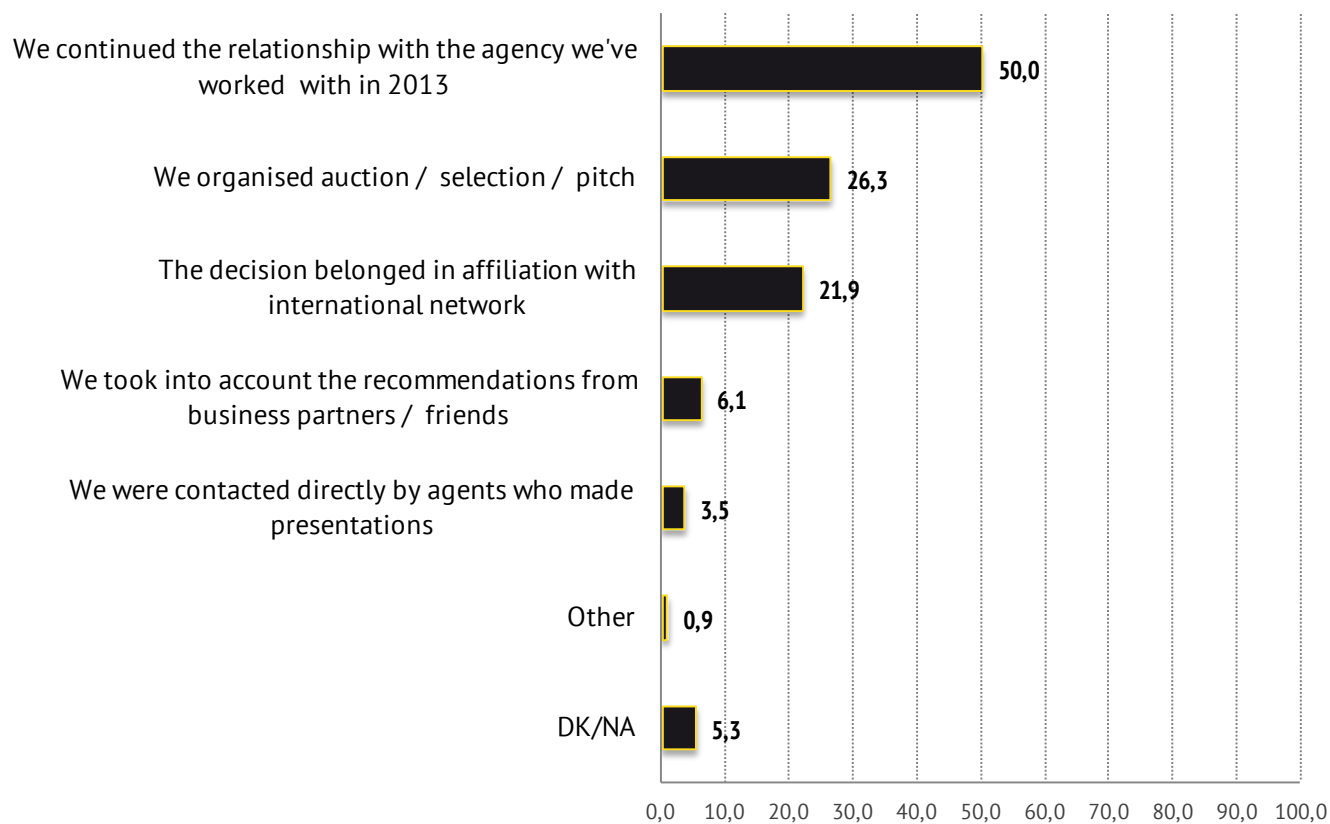
## Others:

- Choosing the wrong channels
- Low or No Capability to implement regional projects
- Not meeting the deadlines
- They loose their motivation throughout the project
- Lack of performance
- Lack of involvement
- Making pitches every three years is mandatory
- See how other companies perform
- Money laundry
- Not up to date with communication trends

## M12. MEDIA AGENCY DECISION



Which of the following sentences describes best the way your company took the decision to work with a media agency?

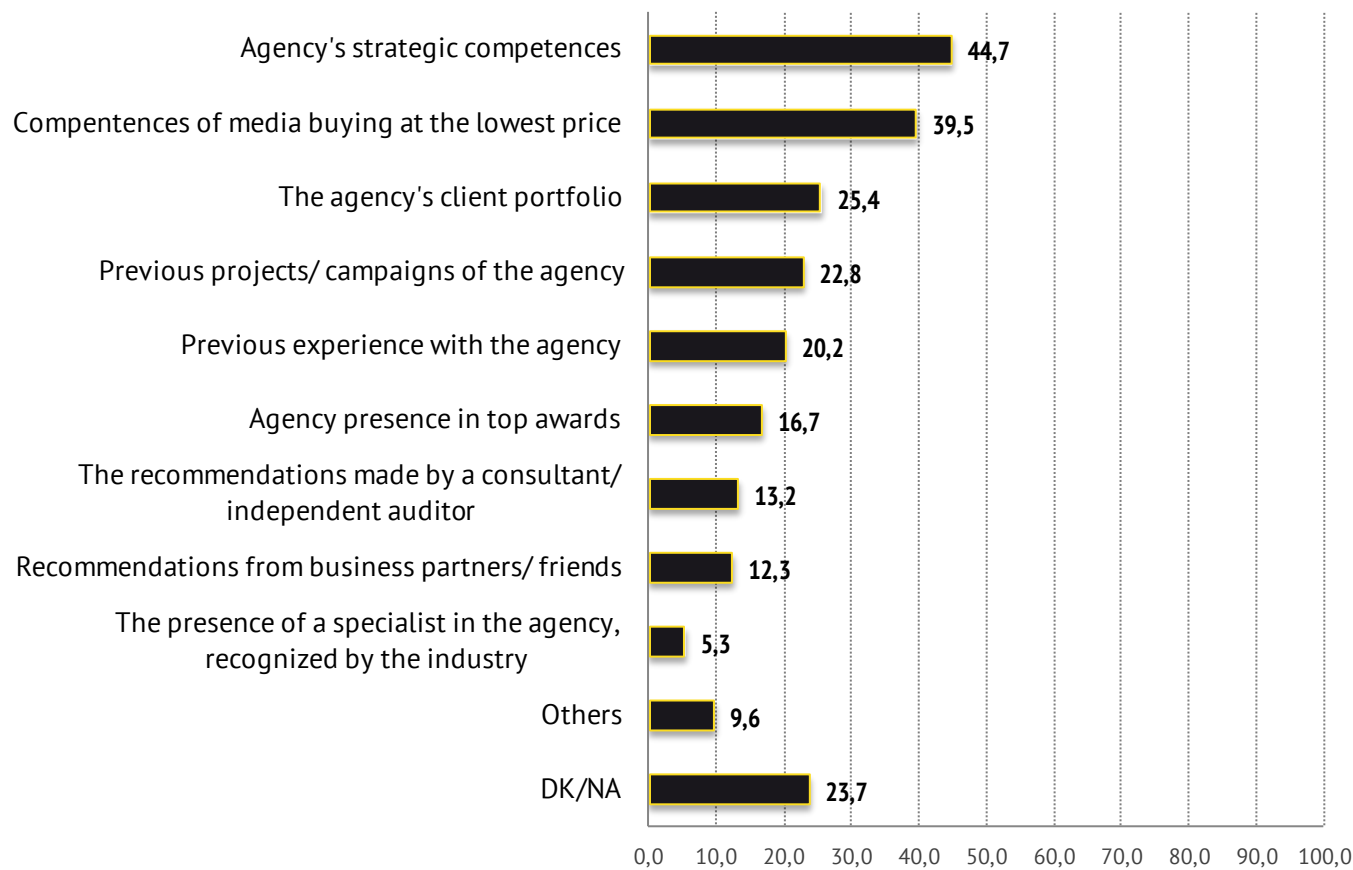


\*N=114, closed multiple answers

### M13. TOP PITCH CRITERIA



Which were the most important criteria that mattered when your company invited a media agency to pitch/pre-selection?

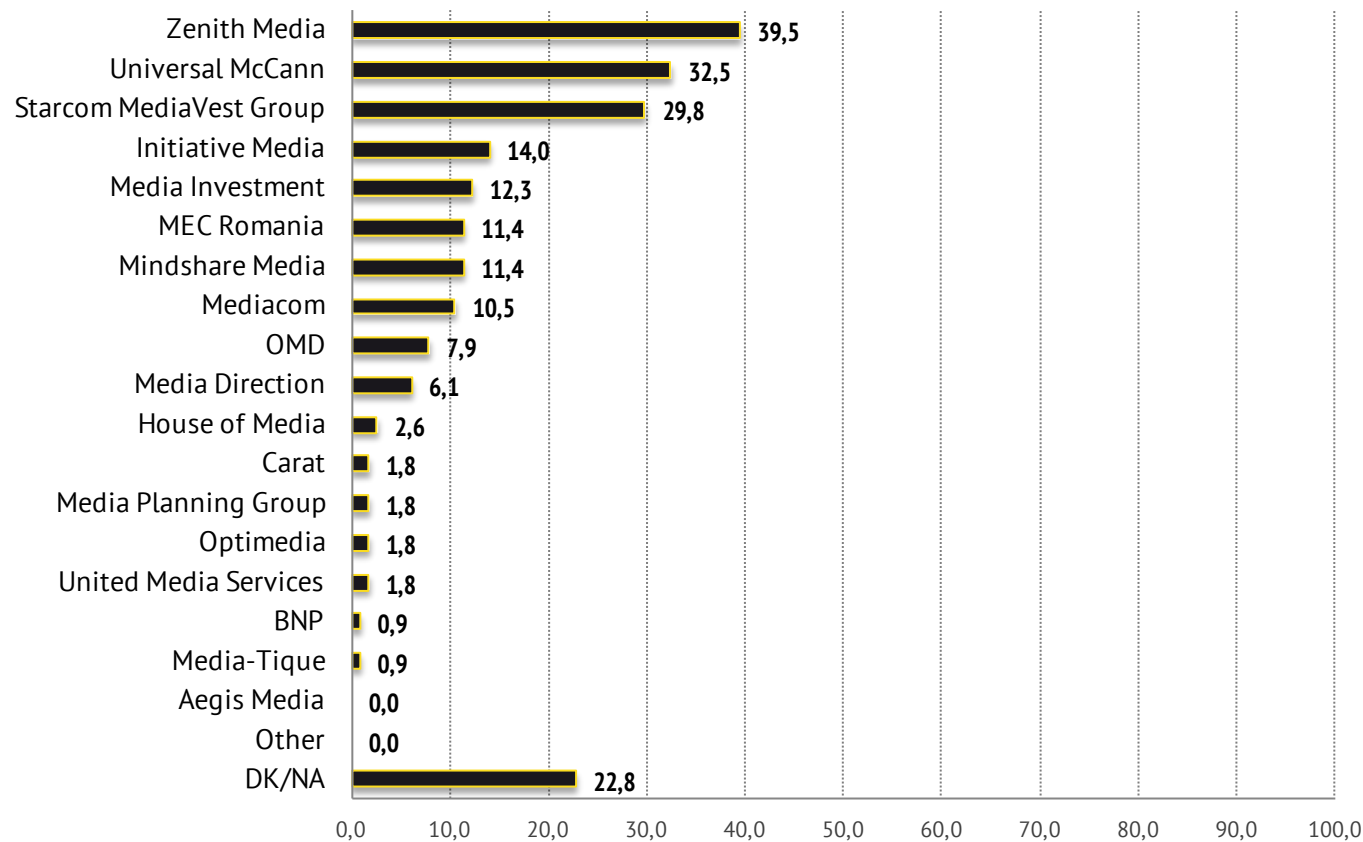


\*N=114, closed multiple answers

## M14. STRONGEST PITCH REFERENCE COMPANIES



In case of a new pitch, I would like to compare the following media agency



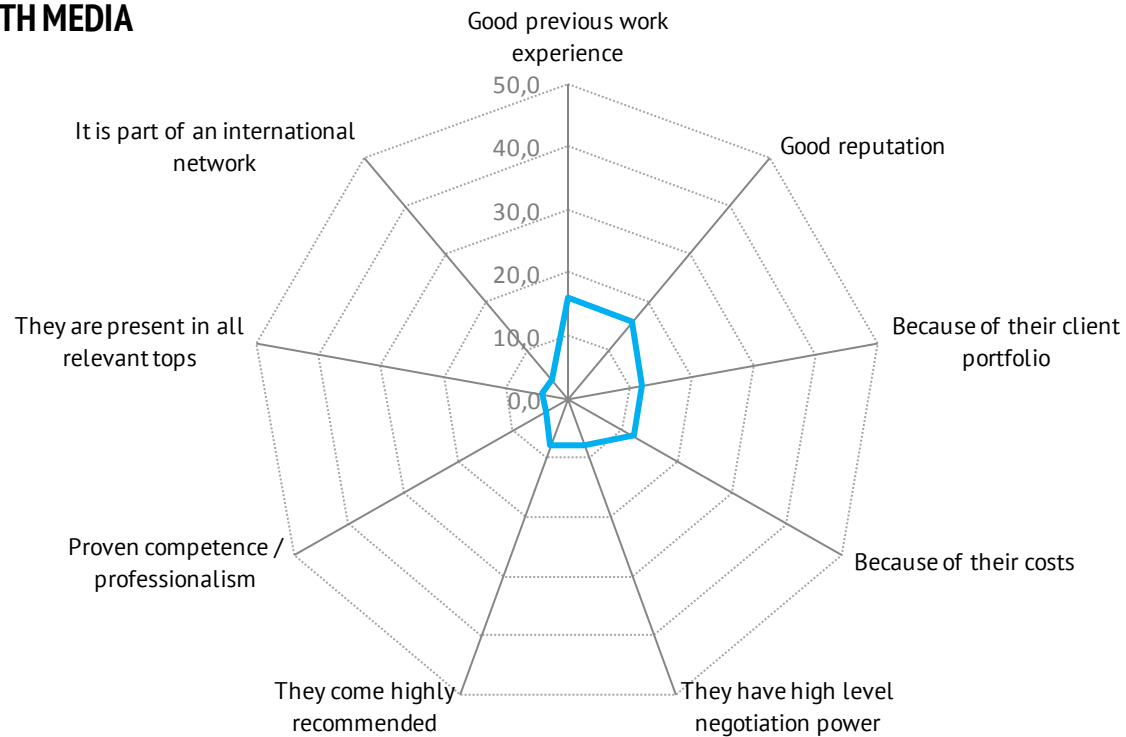
\*N=114, open multiple answers

## M15.1. REASON WHY (PREVIOUS QUESTION)



Please briefly explain the first choice

### ZENITH MEDIA



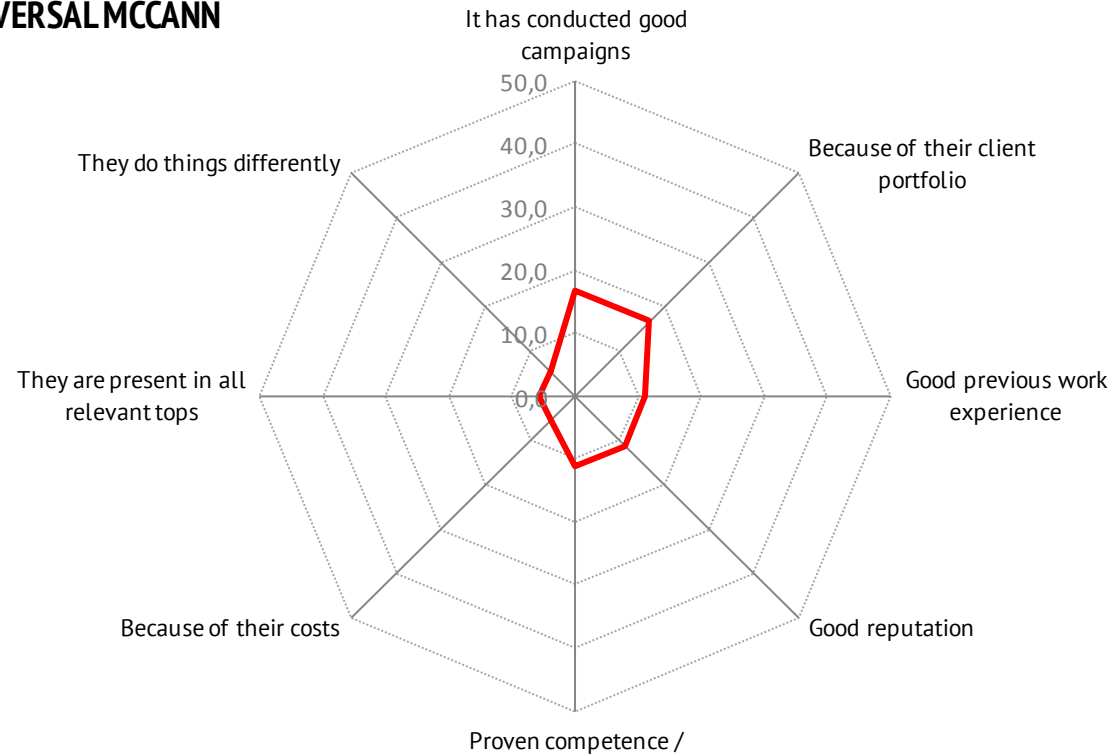
\*N=25 participants that picked the company for first pitch reference, open top 3 answers

## M15.2. REASON WHY (PREVIOUS QUESTION)



Please briefly explain the first choice

### UNIVERSAL MCCANN



\*N=18 participants that picked the company for first pitch reference, open top 3 answers



M15.3. REASON WHY (PREVIOUS QUESTION)



Please briefly explain the first choice

STARCOM MEDIAVEST GROUP



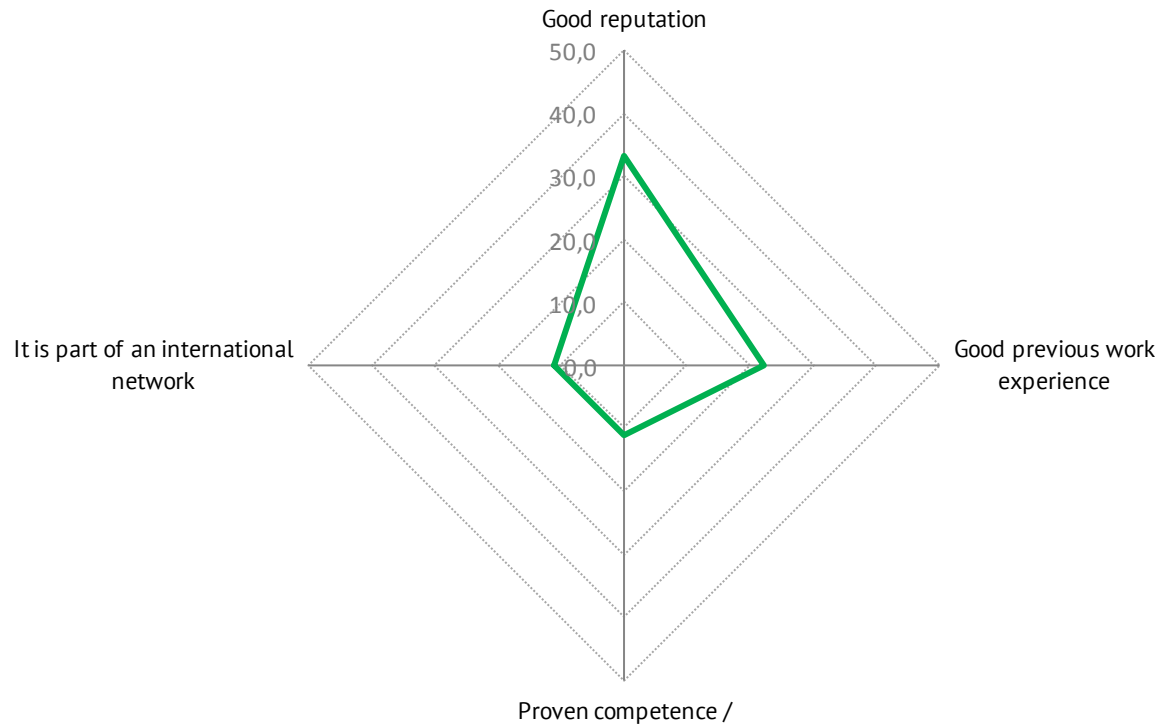
\*N=12 participants that picked the company for first pitch reference, open top 3 answers

## M15.4. REASON WHY (PREVIOUS QUESTION)



Please briefly explain the first choice

### MEC ROMANIA



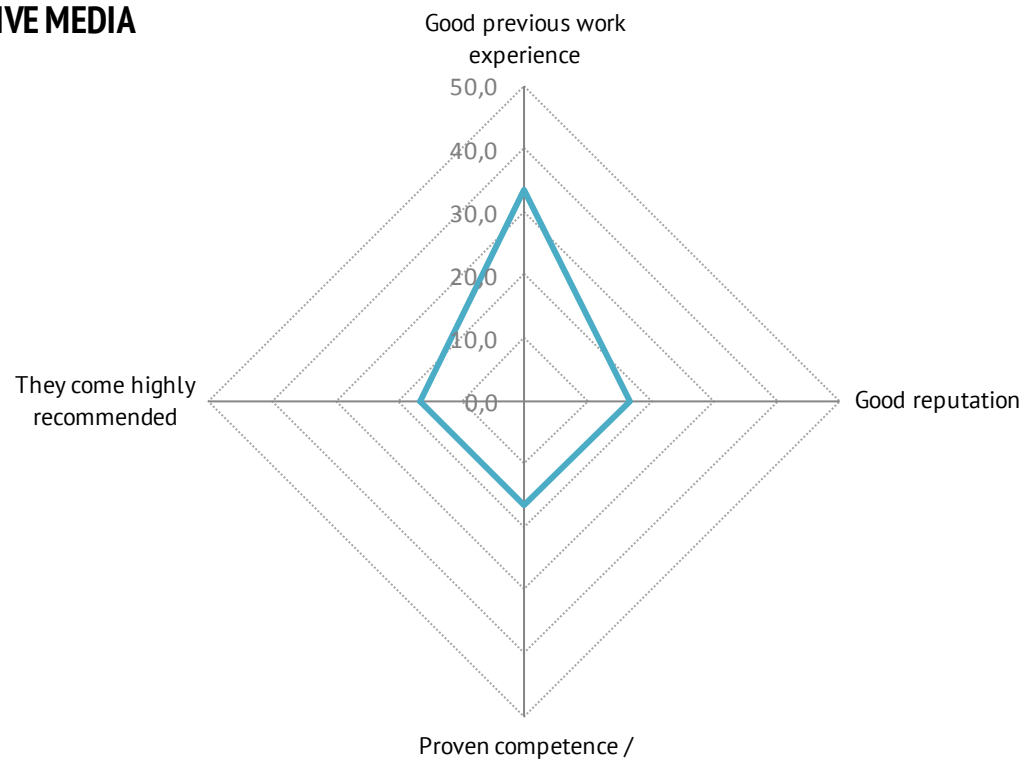
\*N=9 participants that picked the company for first pitch reference, open top 3 answers

M15.5. REASON WHY (PREVIOUS QUESTION)



Please briefly explain the first choice

INITIATIVE MEDIA



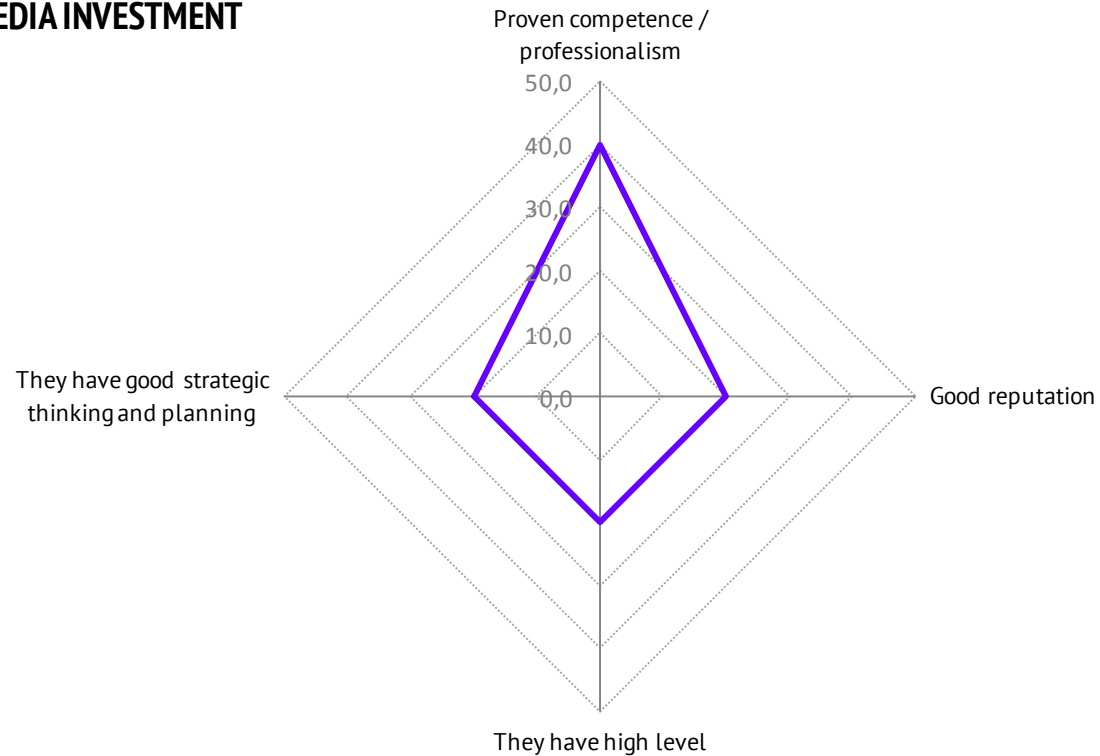
\*N=6 participants that picked the company for first pitch reference, open top 3 answers

## M15.6. REASON WHY (PREVIOUS QUESTION)



Please briefly explain the first choice

### MEDIA INVESTMENT

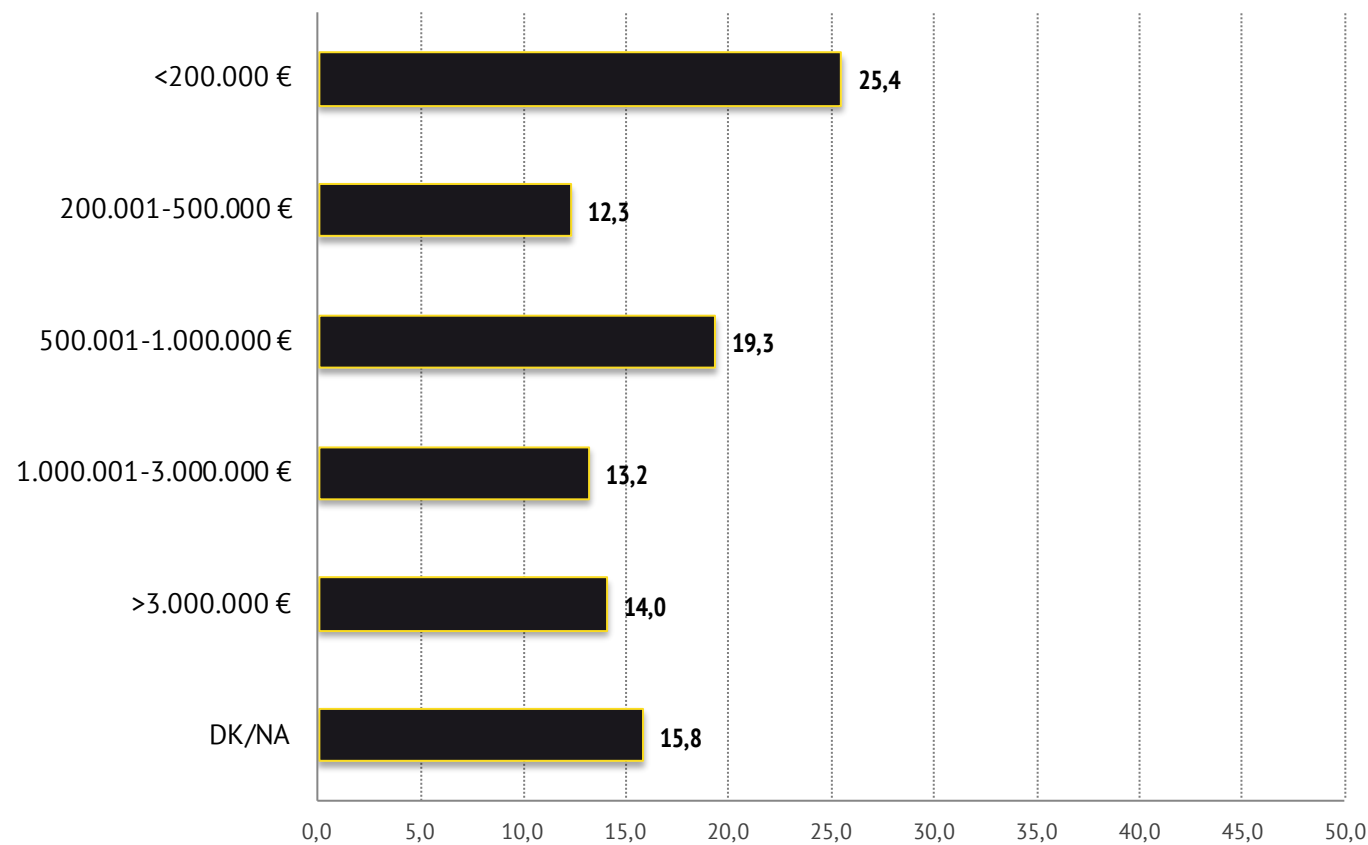


\*N=5 participants that picked the company for first pitch reference, open top 3 answers

## M16. MEDIA BUYING BUDGET



In 2013, what was the budget for media buying?

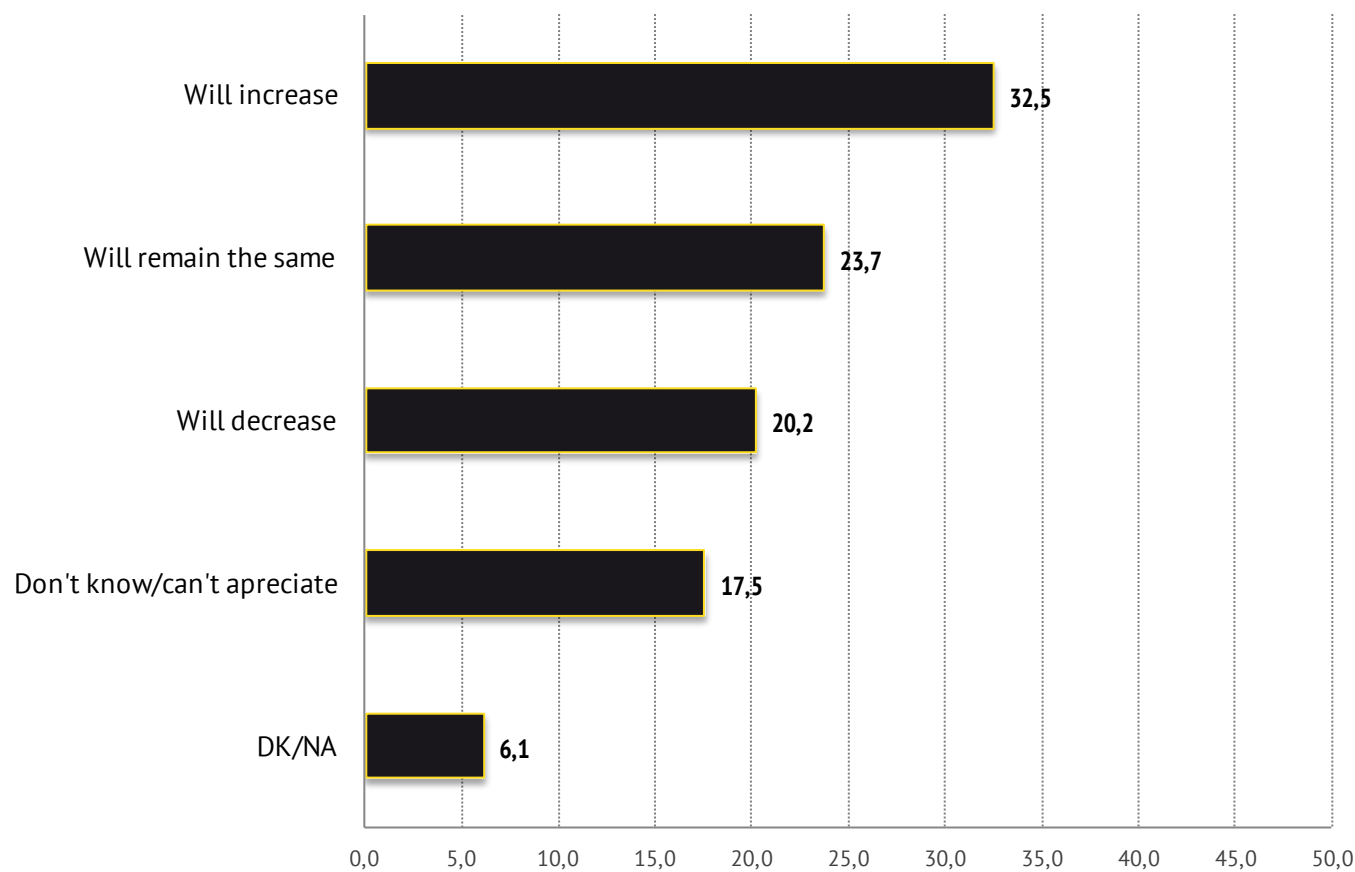


\*N=114, closed single answer

## M17.1. MEDIA BUDGET EVOLUTION IN 2014



As compared with 2013, how do you assess the media budget will evolve in 2014?



\*N=114, closed single answer

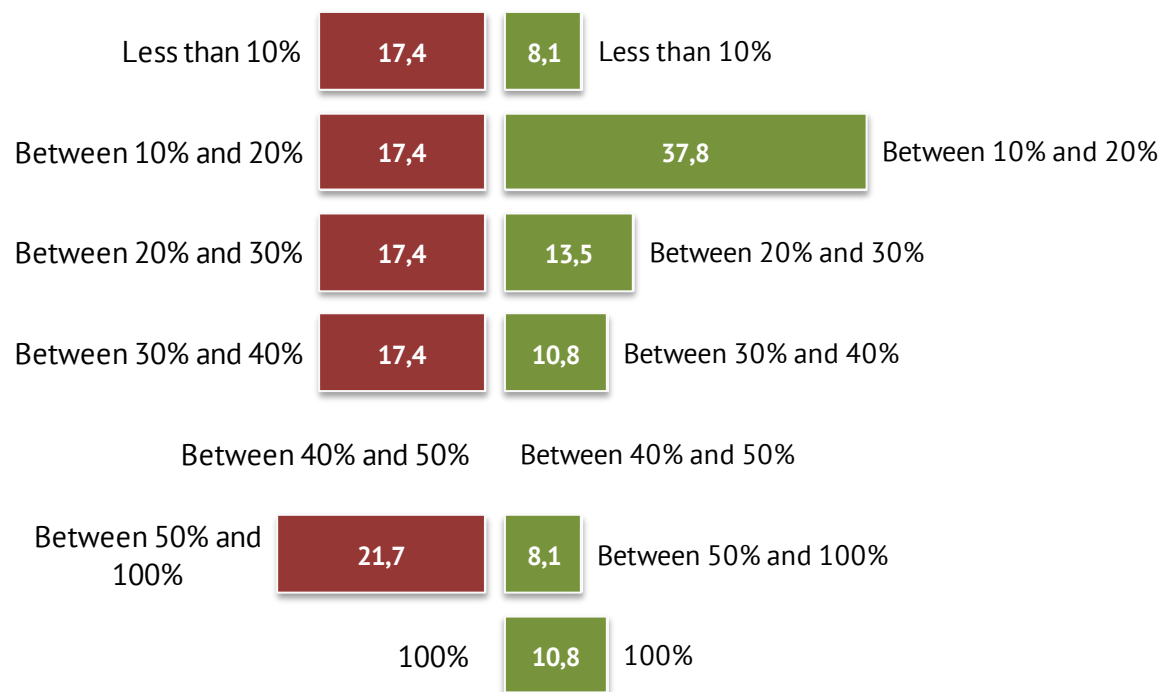
## M17.2. MEDIA BUDGET ESTIMATED EVOLUTIONS



As compared with 2013, how do you assess the media budget will evolve in 2014?

### Will Decrease

### Will Increase



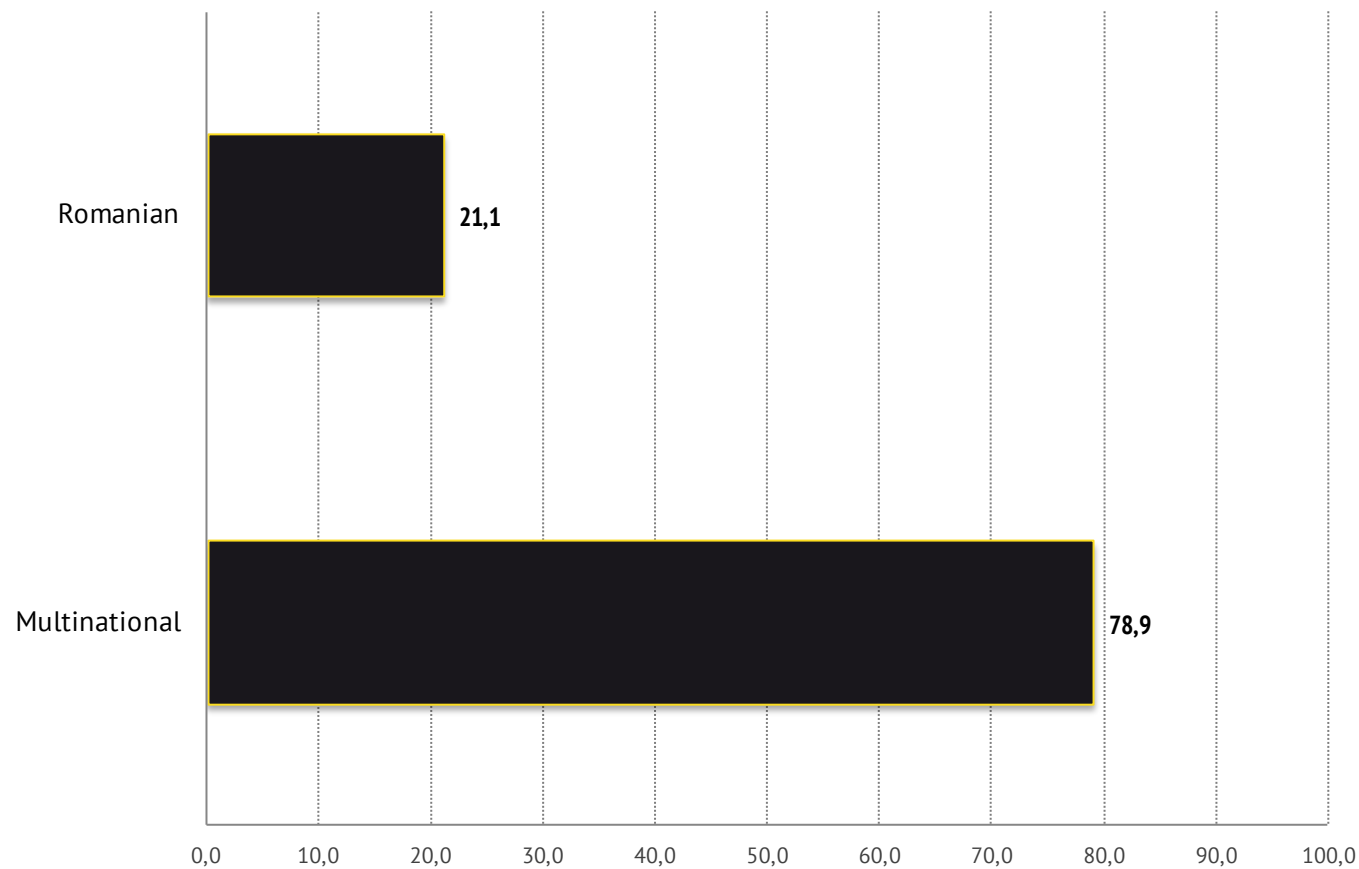
\*N=37 participants estimating answering “increase” at the previous question, closed single answer

\*N=27 participants estimating answering “decrease” at the previous question, closed single answer

## ID1. PROVENIENCE OF SPENDING COMPANY



Romanian / multinational company



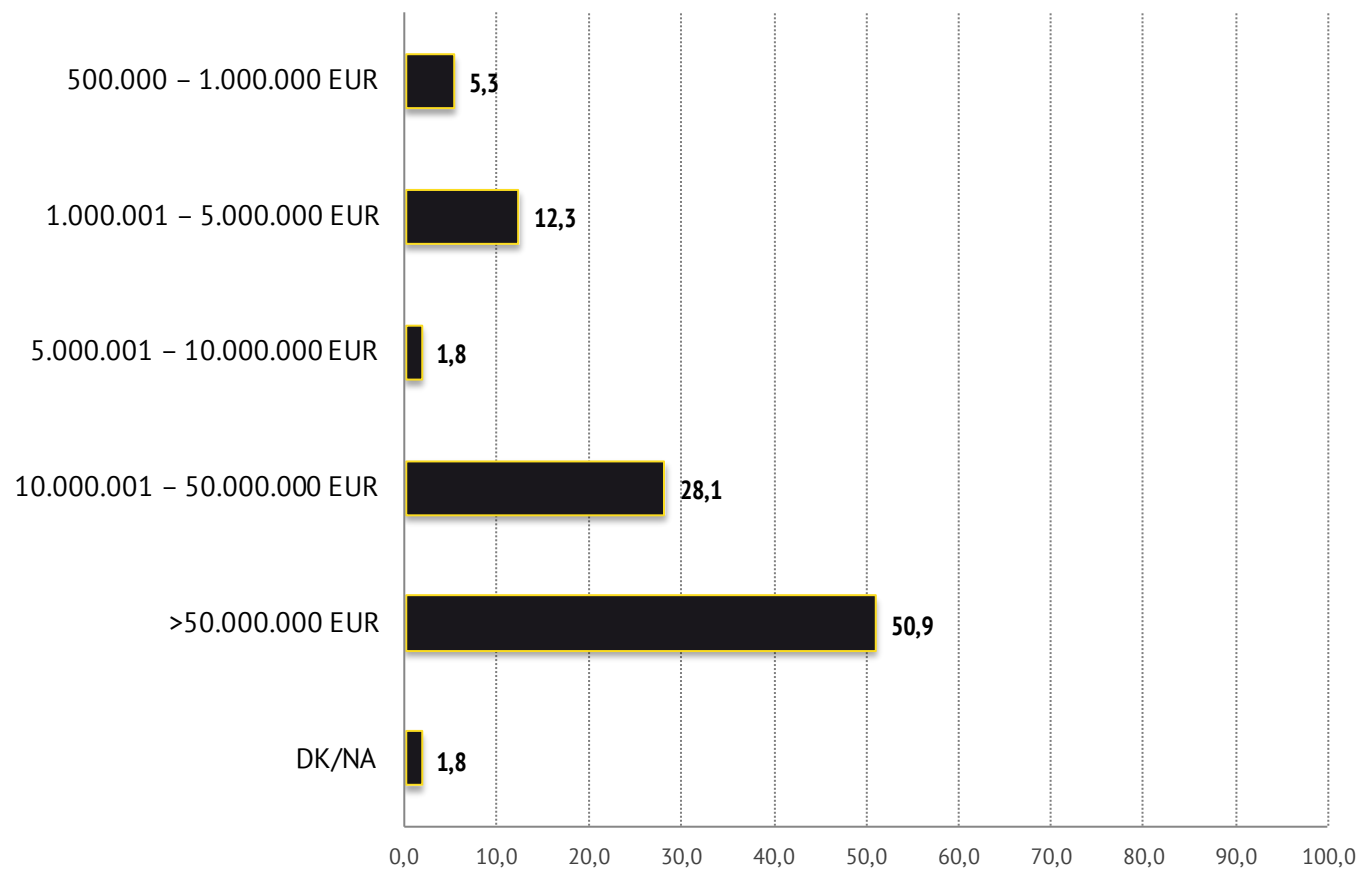
\*N=114, closed single answer



## ID2. TURNOVER



## Company's financial turnover

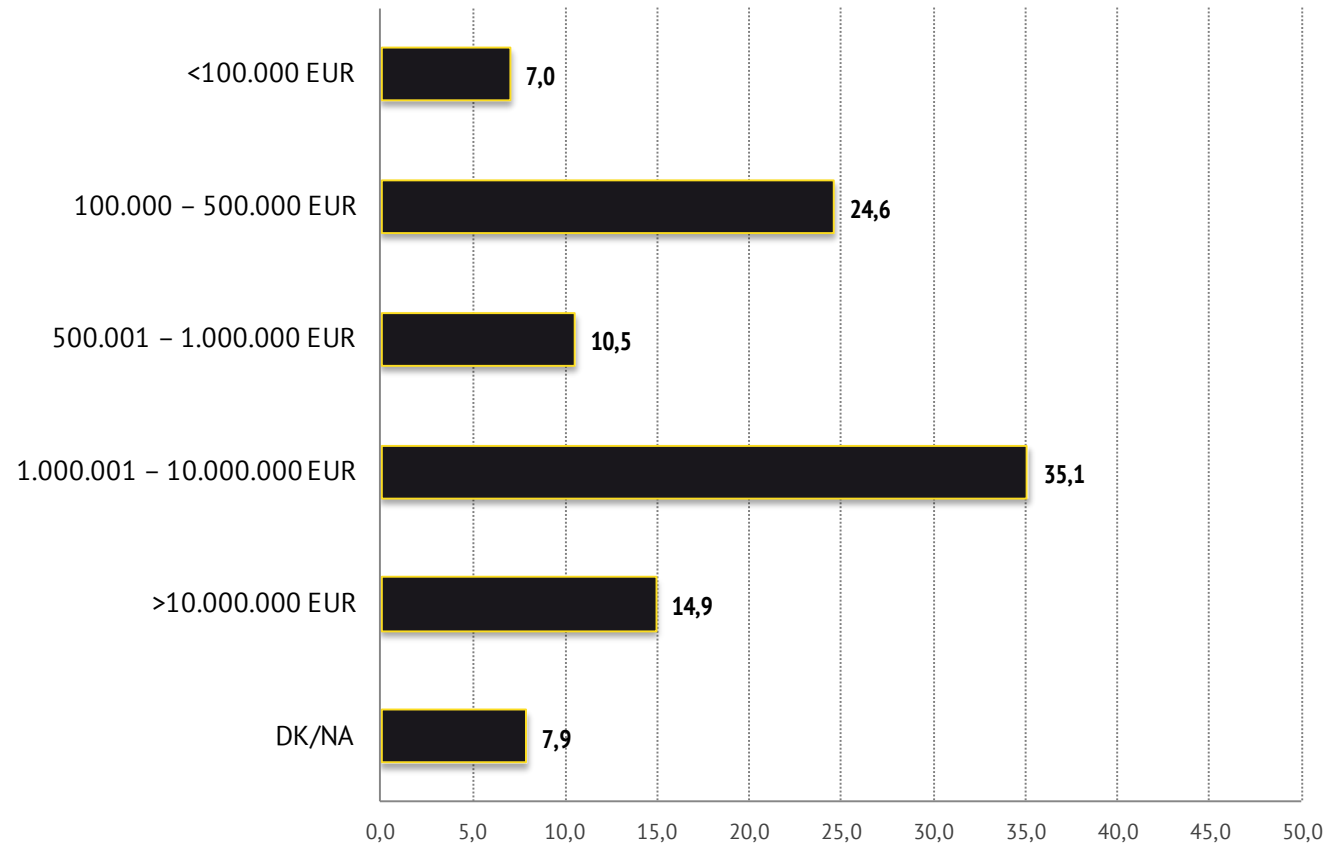


\*N=114, closed single answer

## ID3. TOTAL ADVERTISING SPENDING



Budget for the entire communication activities

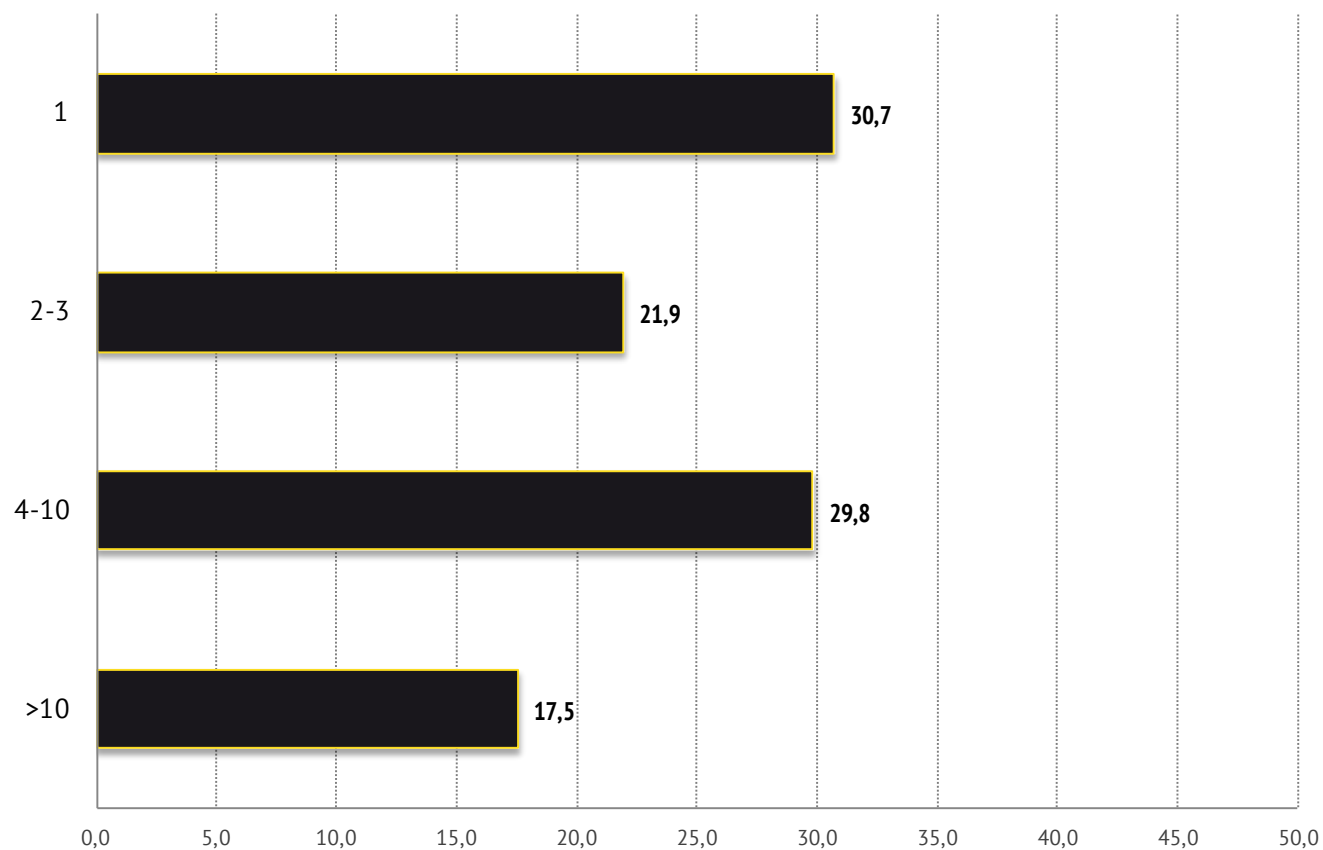


\*N=114, closed single answer

## ID4. NUMBER OF ACTIVE BRANDS IN ROMANIA



Estimated active brands in Romania

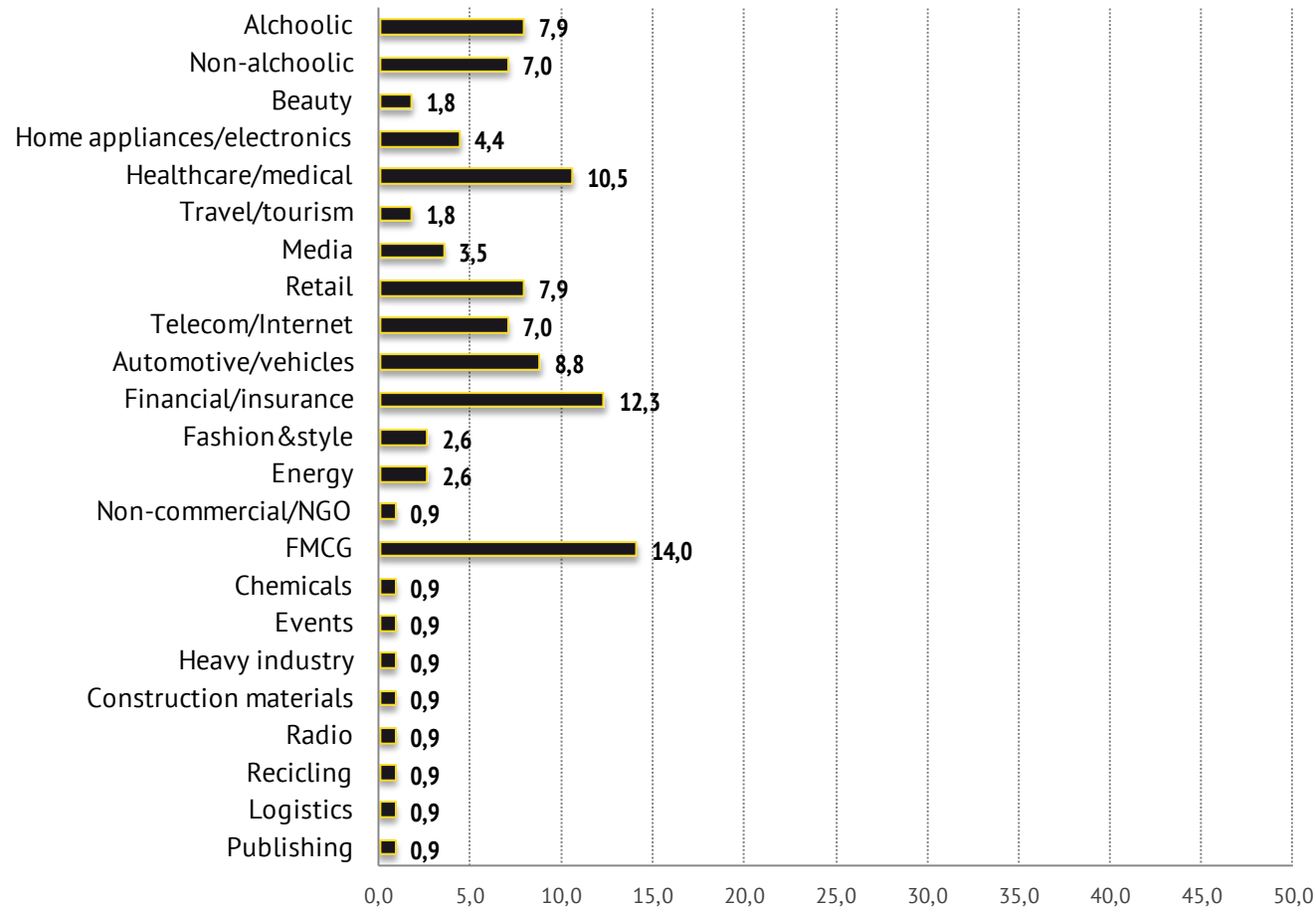


\*N=114, closed single answer

## ID5. DOMAIN OF ACTIVITY



Company's area of activity



\*N=114, closed single answer



Thank you!

For more information, boos or huzzas  
please contact:

[dan.petre@ddresearch.ro](mailto:dan.petre@ddresearch.ro)

[vlad.tureanu@ddresearch.ro](mailto:vlad.tureanu@ddresearch.ro)

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