



Quantitative B2B Research Report

AdMarket Study 2014

The Digital 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 Digital 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 Digital Agencies build to measure all elements established as objectives.

The questionnaire has 46 items. Average interview duration on this questionnaire (digital section only) was 25 minutes.

SAMPLE

The participants were **118 individuals** in charge of the media communication activities in **103 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.

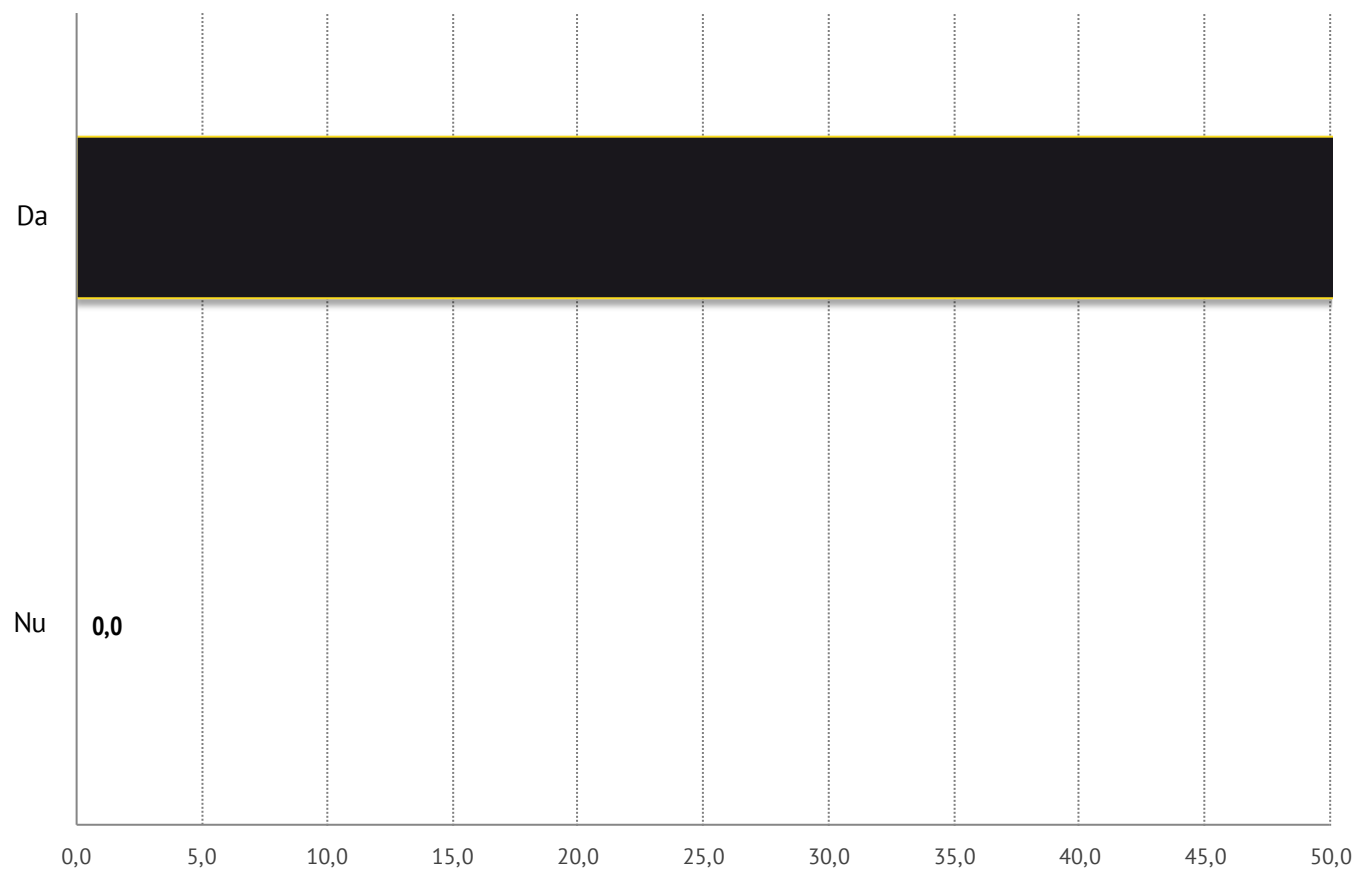
Reporting follows the questionnaire logic and structure and specifies for each graphic:

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

GP1. ONLINE PRESENCE



At this moment is your company present and engaged in online communication?

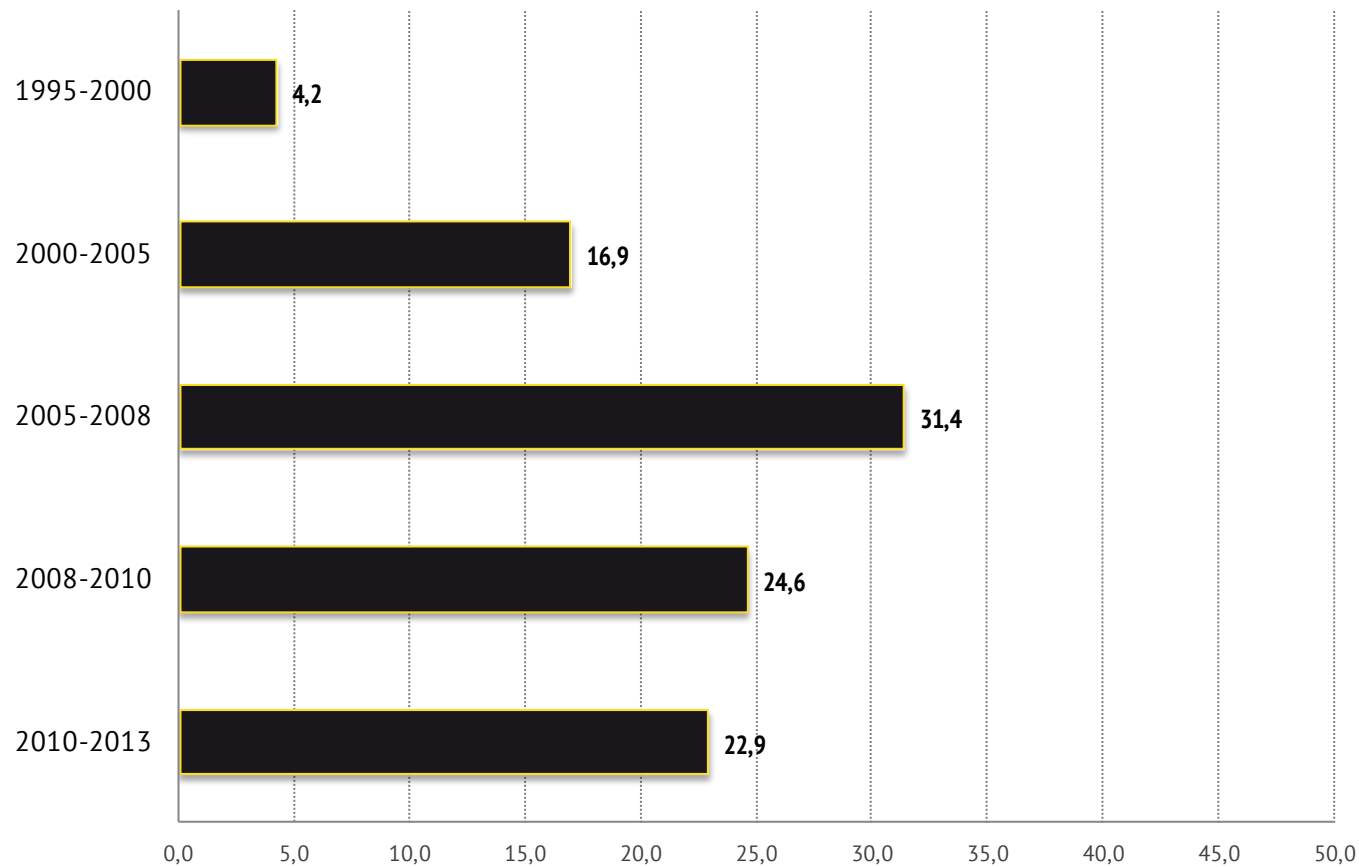


*N=118, closed single answer

GP2. PERSONAL HISTORY IN DIGITAL SINCE '95



When did you, personally, first made and implemented a digital advertising campaign?

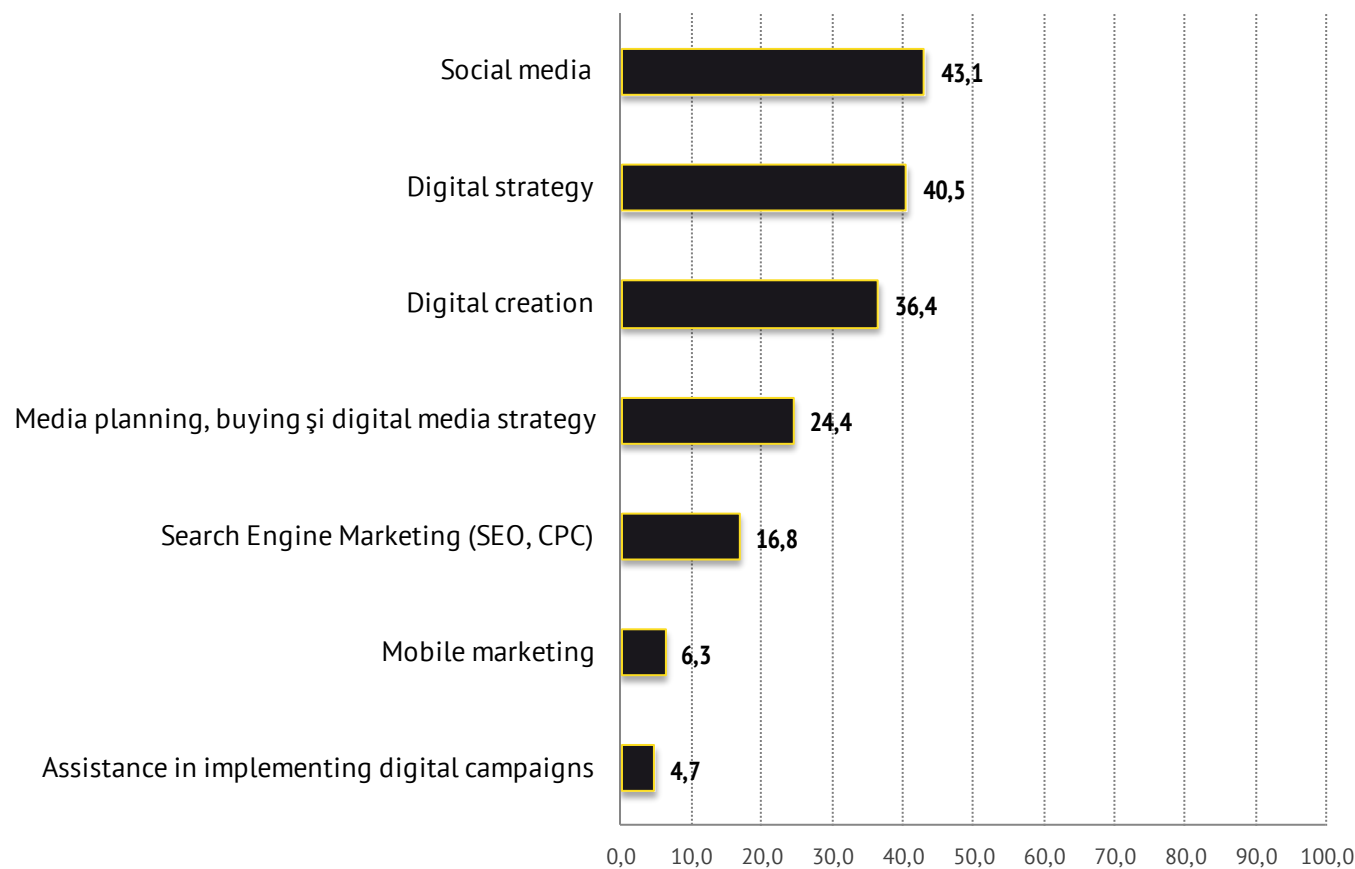


*N=118, closed single answer

GP3.1. TOP 3 ONLINE ACTIVITIES IN 2013



Which were the most important online activities conducted by your company in 2013?

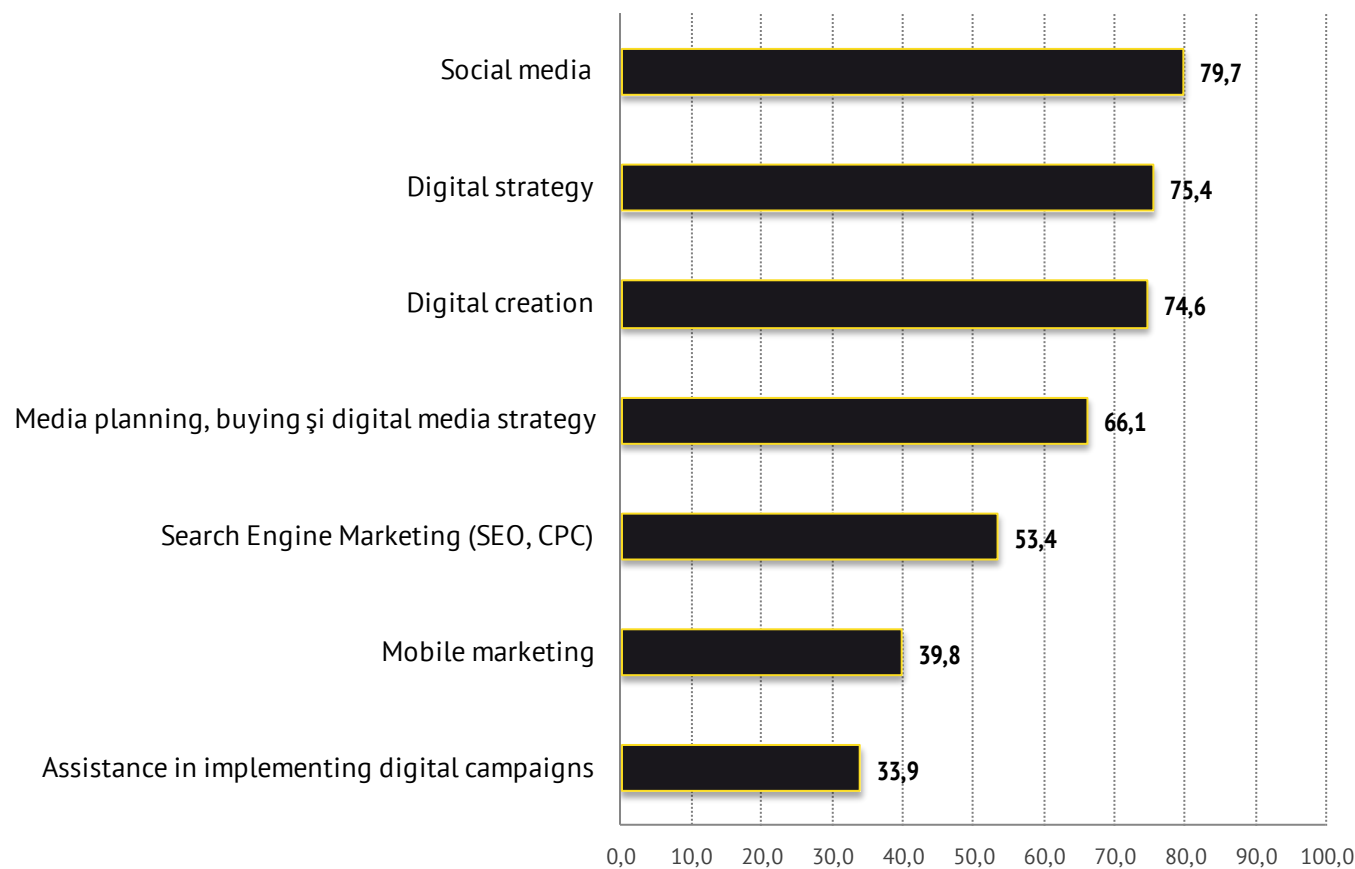


*N=118, spontaneous top 3 answer

GP3.2. ALL ONLINE ACTIVITIES IN 2013



Which of the following online activities were implemented by your company in 2013?

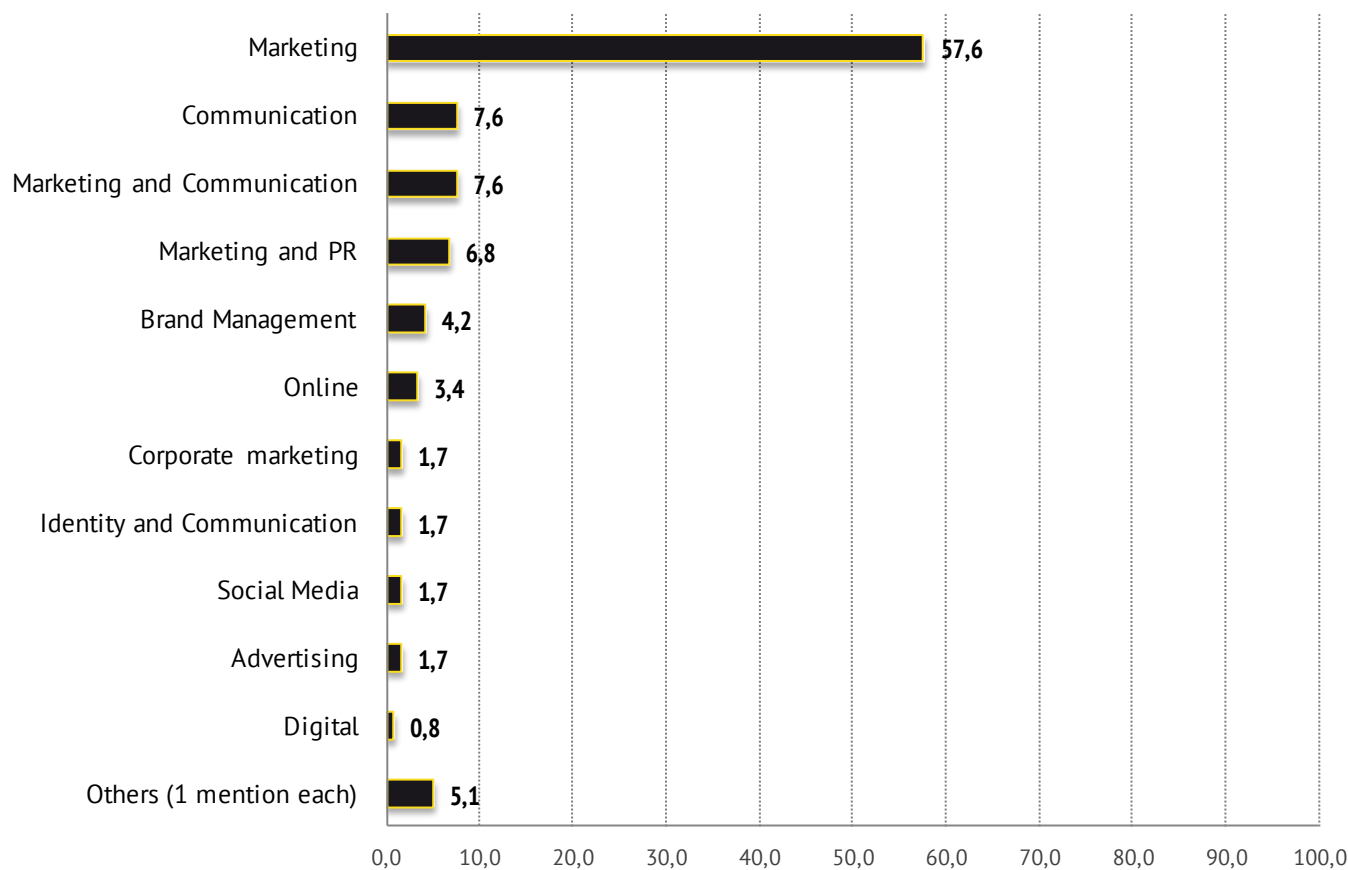


*N=118, closed multiple answers

GP4. DEPARTMENT MANAGING ONLINE ACTIVITIES



Which department from your company manages online activities and social media?

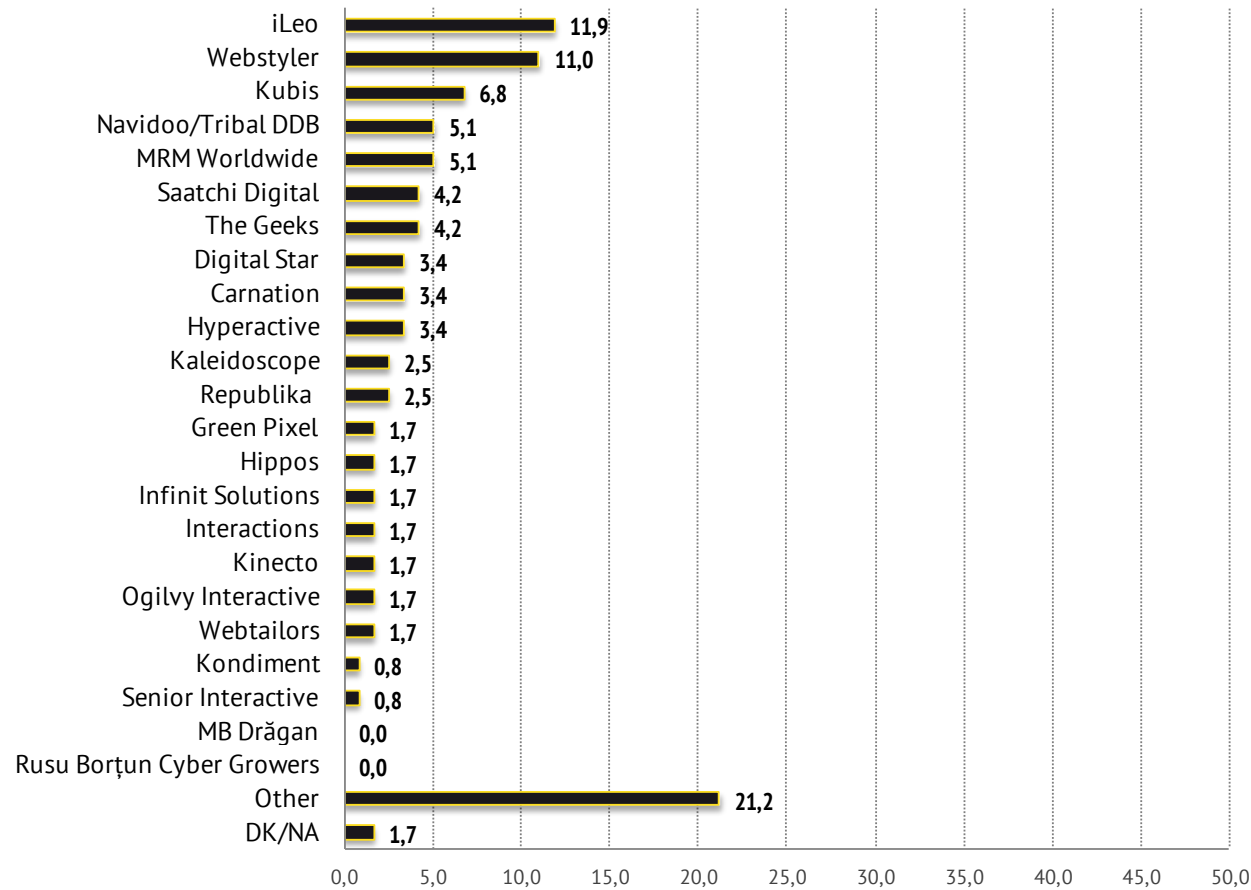


*N=118, open single answer

A1.1. DIGITAL AGENCIES AWARENESS – TOP OF MIND



Which is the digital agency that you can think of at this moment?



*N=118, spontaneous single answer

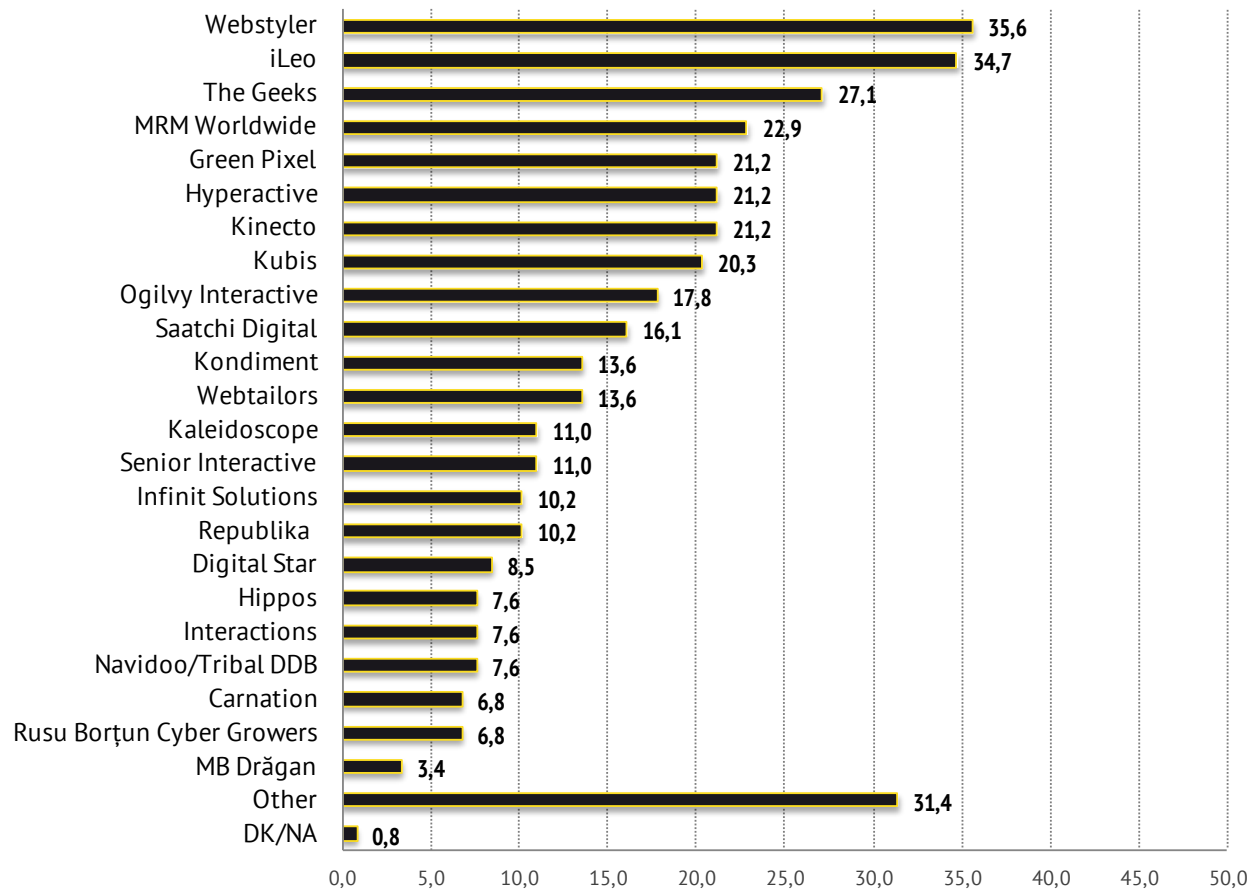
Other agencies mentioned:

- CONVERSION
- DECORPORATE MEDIA
- GRAPEFRUIT
- MINDSHARE
- MSPS
- NEXT ADVERTISING
- OPTIMEDIA
- PROXIMITY
- PUBLICIS
- SPADA
- SPOON MEDIA
- SUNSHINE
- THINK DIGITAL
- TOP HAT
- V8 PROPAGANDA
- WEB MEDIA MARKETING
- ZETCOM

A1.2. DIGITAL AGENCIES ALL UNPROMPTED AWARENESS



What other digital agencies do you know or heard of?



*N=118, spontaneous multiple answers

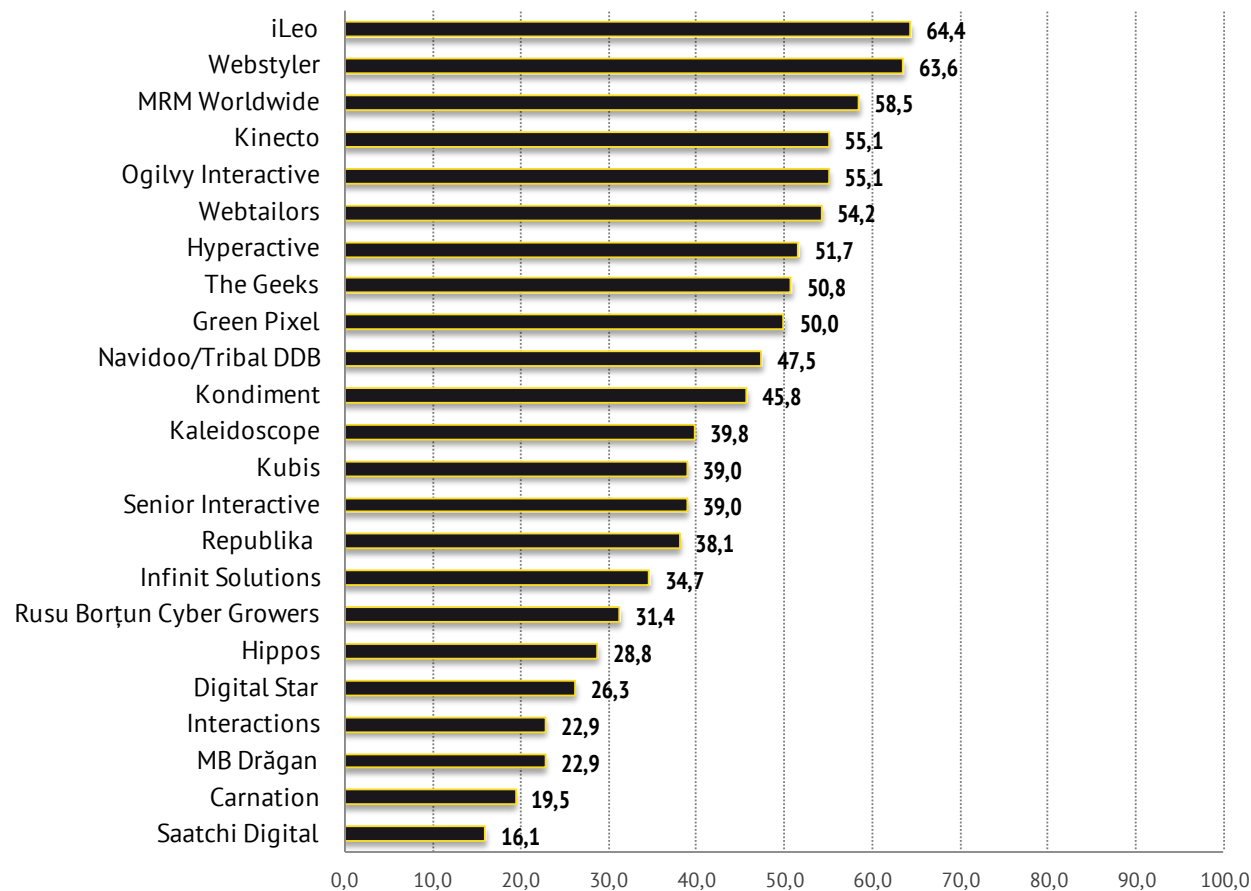
Other agencies mentioned:

- ADVANCE IDEAS
- BAKERS
- BRAND UP
- FRANK ADVERTISING
- GEOMETRY GLOBAL
- GOLINHARRIS
- HAVAS
- LOWE & PARTNERS
- MEDIA INVESTMENT
- NEXT ADVERTISING
- PROXIMITY
- PUBLICIS
- PUBLICIS ONLINE
- PUKKA
- PYGMALION
- SENIORHYPER
- STARCOM MEDIAVESTGROUP
- SUPER PUNK
- TELLISO
- WHITE IMAGE
- WIND
- ZEN DIGITAL
- ZENITH

A1.3. DIGITAL AGENCIES RECOGNITION



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

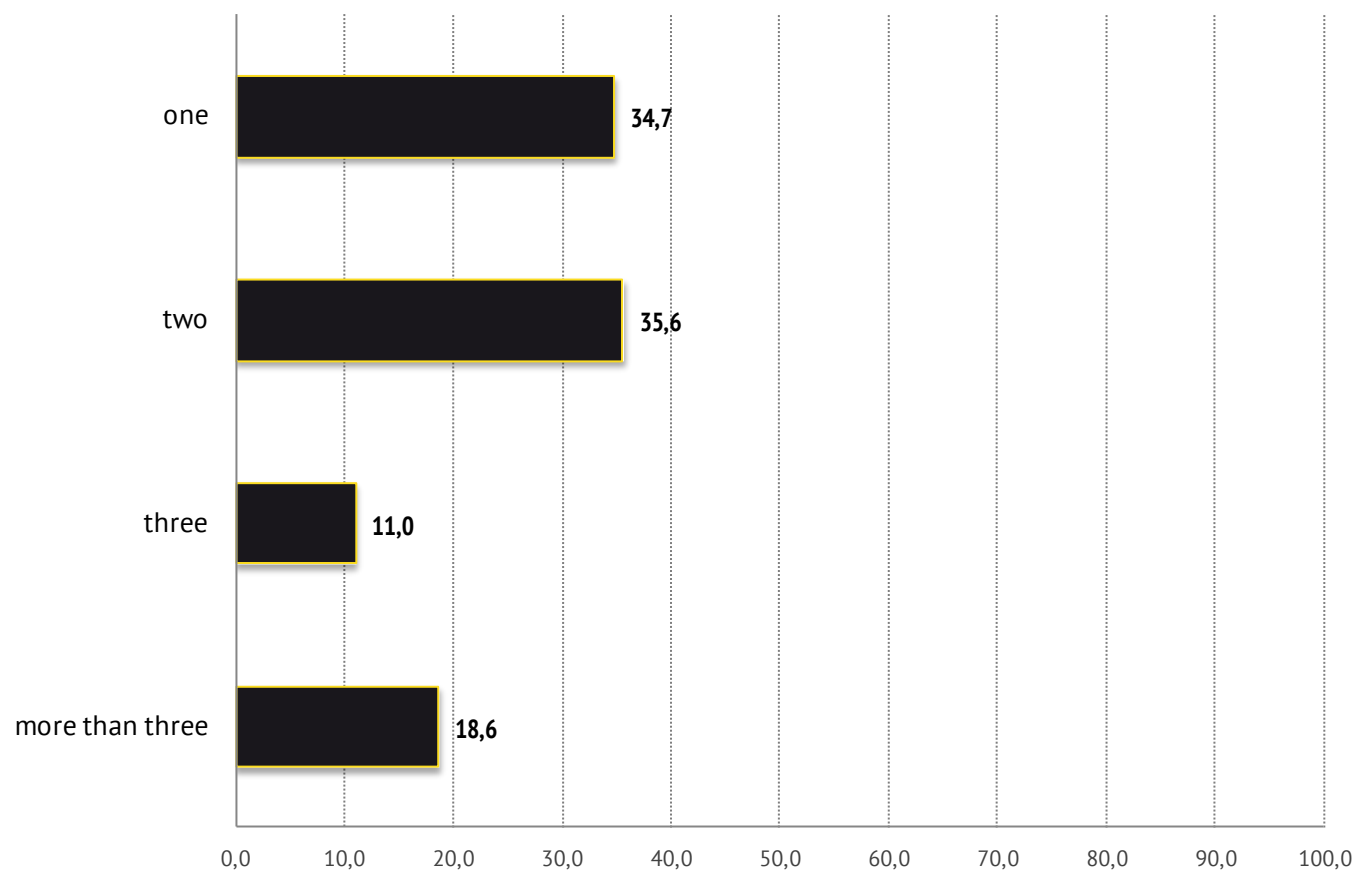


*N=118, closed multiple answers

U1. EMPLOYED AGENCIES



In 2013, with how many digital agencies did your company worked with?

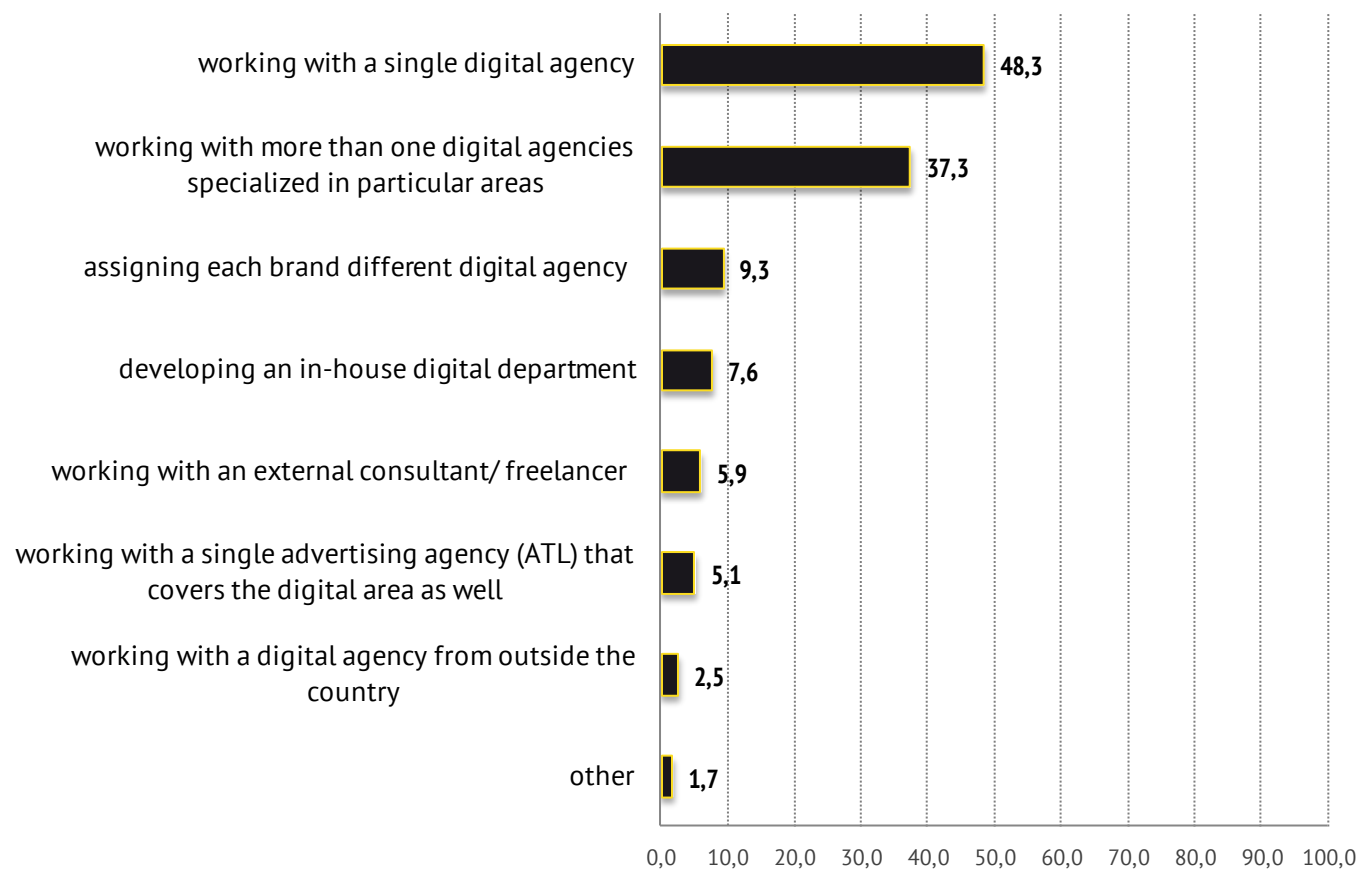


*N=118, closed single answer

U2. DIGITAL NEEDS



Which of the following sentences describe best the way your company prefers to cover its' digital needs?

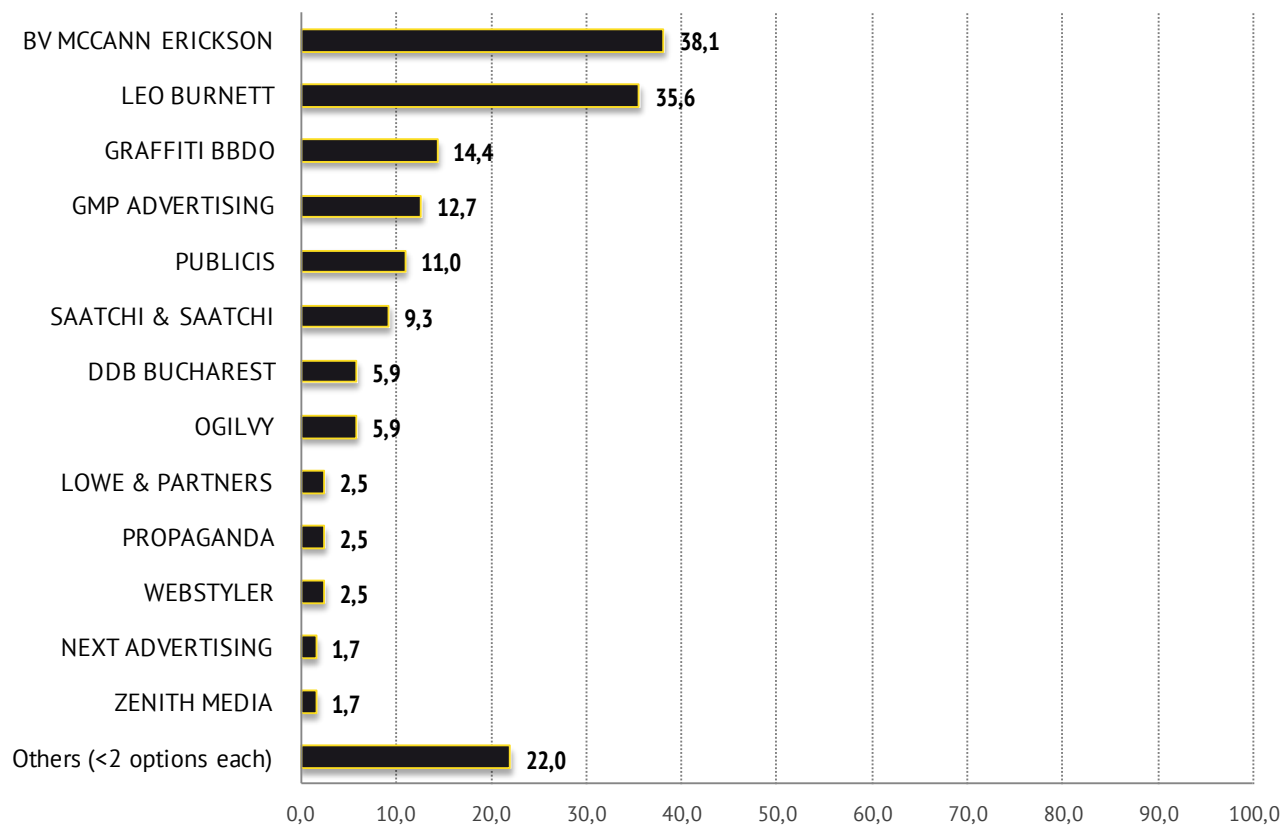


*N=118, closed multiple answer

U3. HIGHEST DIGITAL SKILLS FOR AN ATL AGENCY



Which of the advertising agencies (considered “classical”, ATL specialized) do you think has the highest competences in digital?



*N=118, open multiple answers

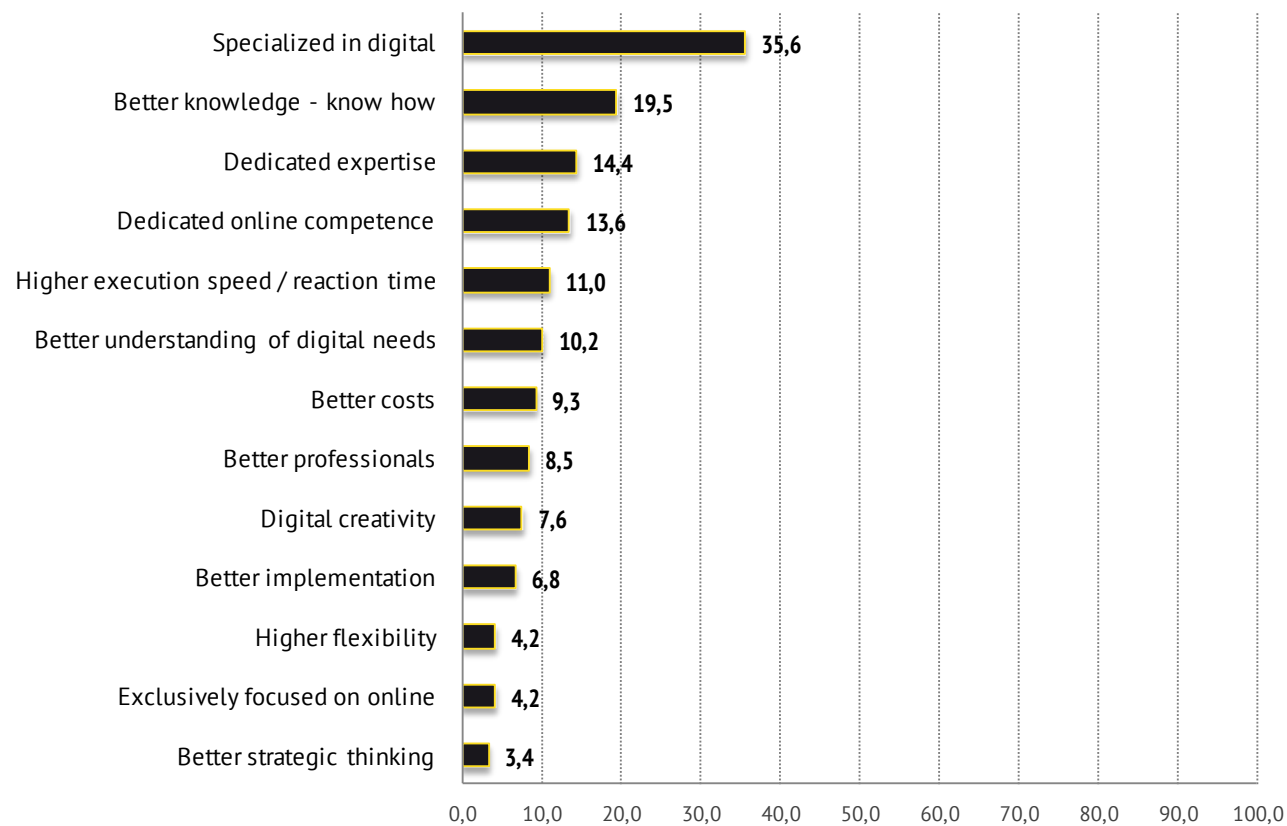
Other agencies mentioned:

- BM ("UK Agency")
- CAP
- COHN & JANSEN JWT
- DIGITAL STAR
- DRAFT
- ERKA PROMOTIONS
- GMP
- GREEN PIXEL
- GREY
- HIPPOS
- HYPERACTIVE
- INITIATIVE MEDIA
- KALEIDOSCOPE
- MEDIACOM
- MRM WORLDWIDE
- MSPS
- OMD
- PAPAYA
- REPUBLIKA
- RUSU BORTUN CYBER GROWERS
- SENIOR INTERACTIVE
- STARCOM MEDIAVEST GROUP
- TEMPO ADVERTISING
- THE GROUP
- THE PRACTICE
- WEBTAYLORS

U4. REASON WHY THE CHOICE IS A DIGITAL AGENCY



In case you work with a digital agency, which are the reasons you prefer it against a classical ATL advertising agency?

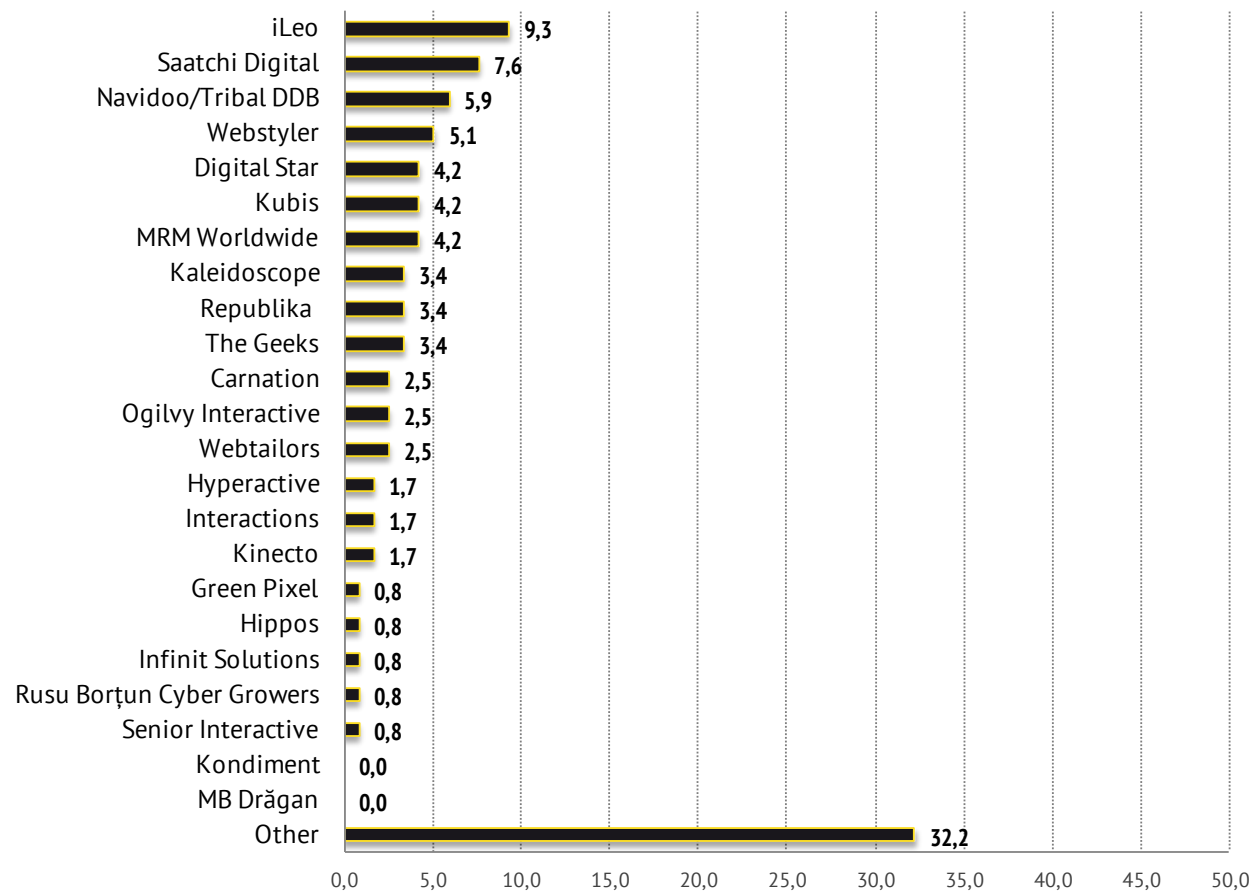


*N=118, open multiple answers

U5.1. EMPLOYED AGENCIES



Please name the digital agency your company worked with in 2013



*N=118, closed single answer

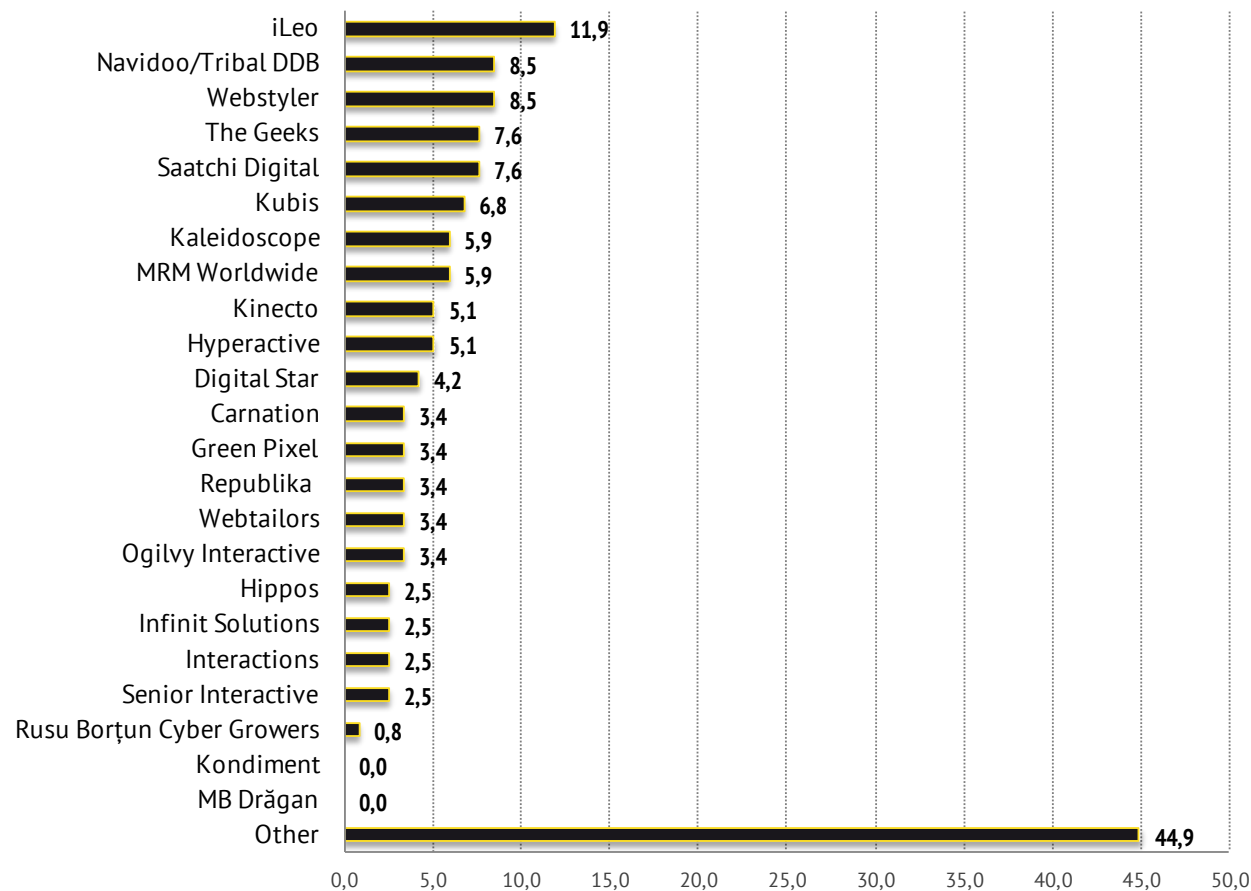
Other agencies mentioned:

- BUSINESS RESULTS
- CAERUS MEDIA
- COHN & JANSEN JWT
- CONVERSION
- DECORPORATE MEDIA
- GEOMETRY GLOBAL
- GRAPEFRUIT
- MEDIA INVESTMENT
- MEDIATIC
- MINDSHARE
- MSPS
- NEXT ADVERTISING
- OPTIMEDIA
- OUTBOX
- PROXIMITY
- PUBLICIS
- SENIORHYPER
- SMART IDEA BUSINESS RESULTS
- SPOON MEDIA
- SUNSHINE DIGITAL
- SUPER PUNK
- TELLISO
- V8 PROPAGANDA
- WEB MEDIA MARKETING
- XPLAIN
- ZETCOM

U5.2. EMPLOYED AGENCIES



Please name the other digital agencies which your company worked with in 2013



*N=118, closed multiple answers

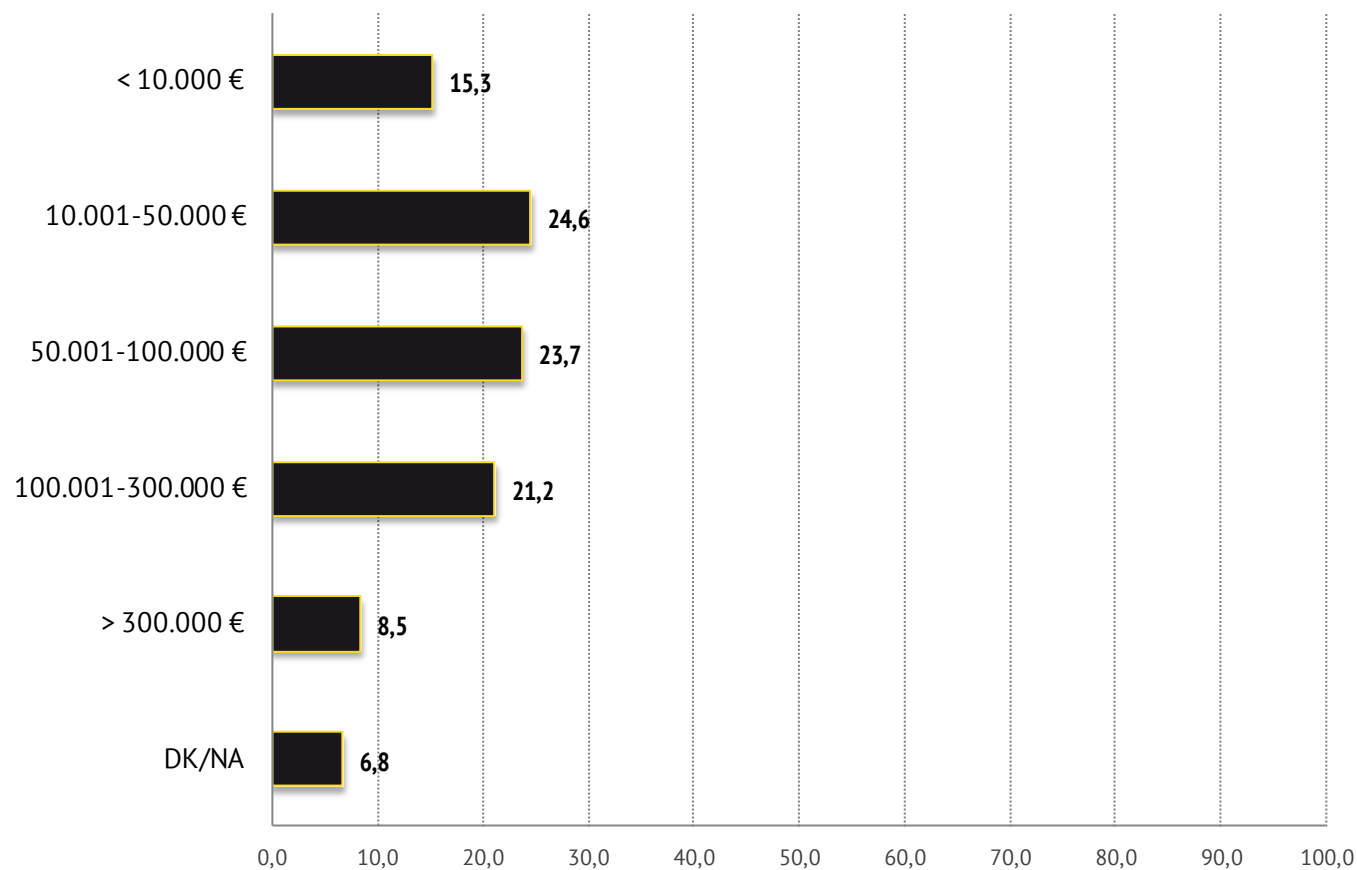
Other agencies mentioned:

- ADD EVOLUTION
- ADVANCED IDEAS
- ANAGRAMA
- BAKERS
- GAV
- GEOMETRY GLOBAL
- GOLINHARRIS
- GRAFICA & TIPAR
- INITIATIVE MEDIA
- MAIL AGENT
- MEDIACAFE
- MINDSHARE
- MPG HAVAS
- MSPS
- PUBLICIS
- SPADA
- STARCOM MEDIAVEST GROUP
- SUNSHINE DIGITAL
- THE MANSION ADVERTISING
- THE PRACTICE
- THINK DIGITAL
- TOUCH MEDIA
- TTM
- WIND
- WUNDERMAN
- XPLAIN

PE1. DIGITAL COMMUNICATION BUDGET



In 2013, what was the budget for digital communication?

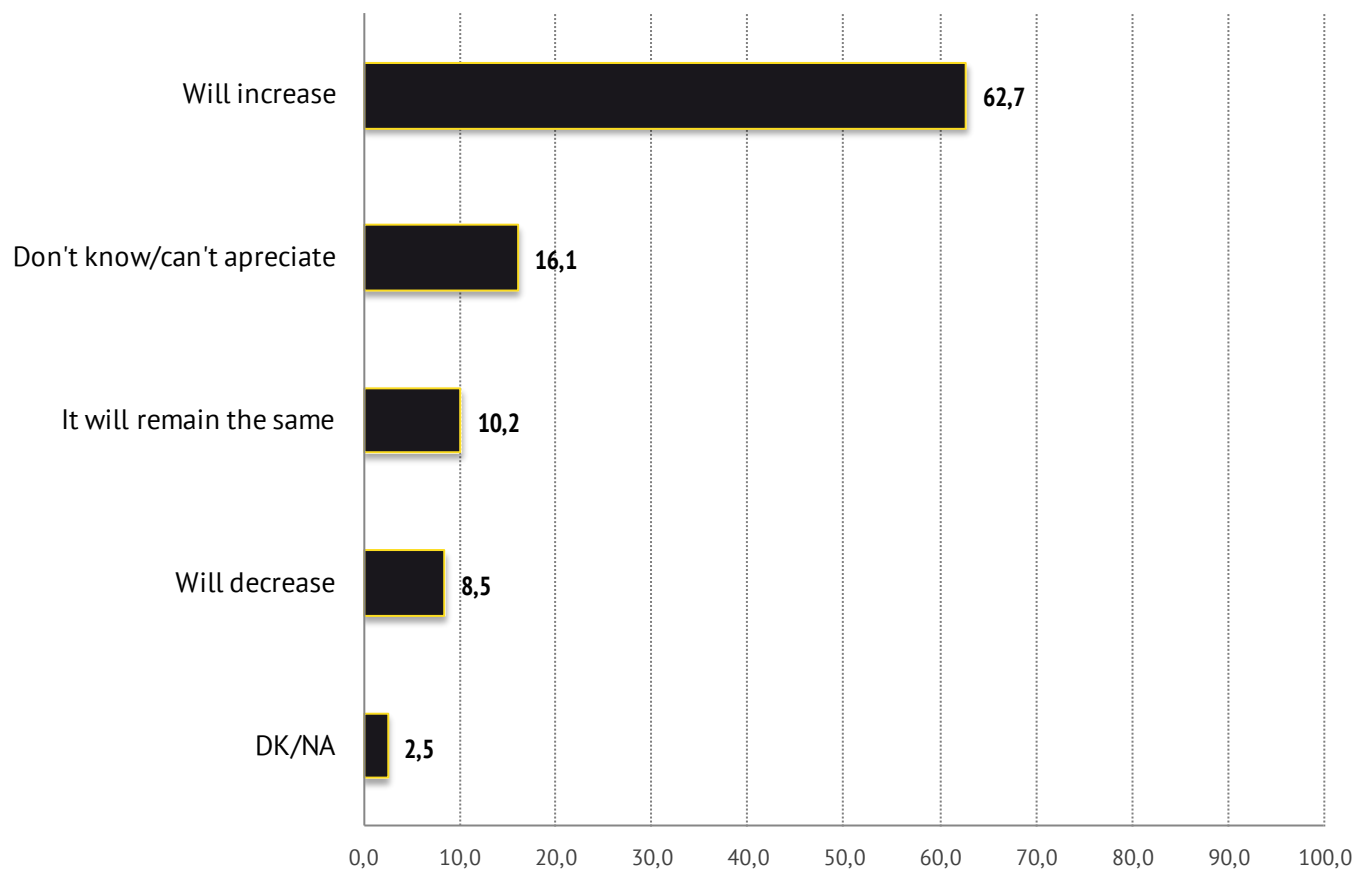


*N=118, closed single answer

PE2. DIGITAL BUDGET EVOLUTION IN 2014



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

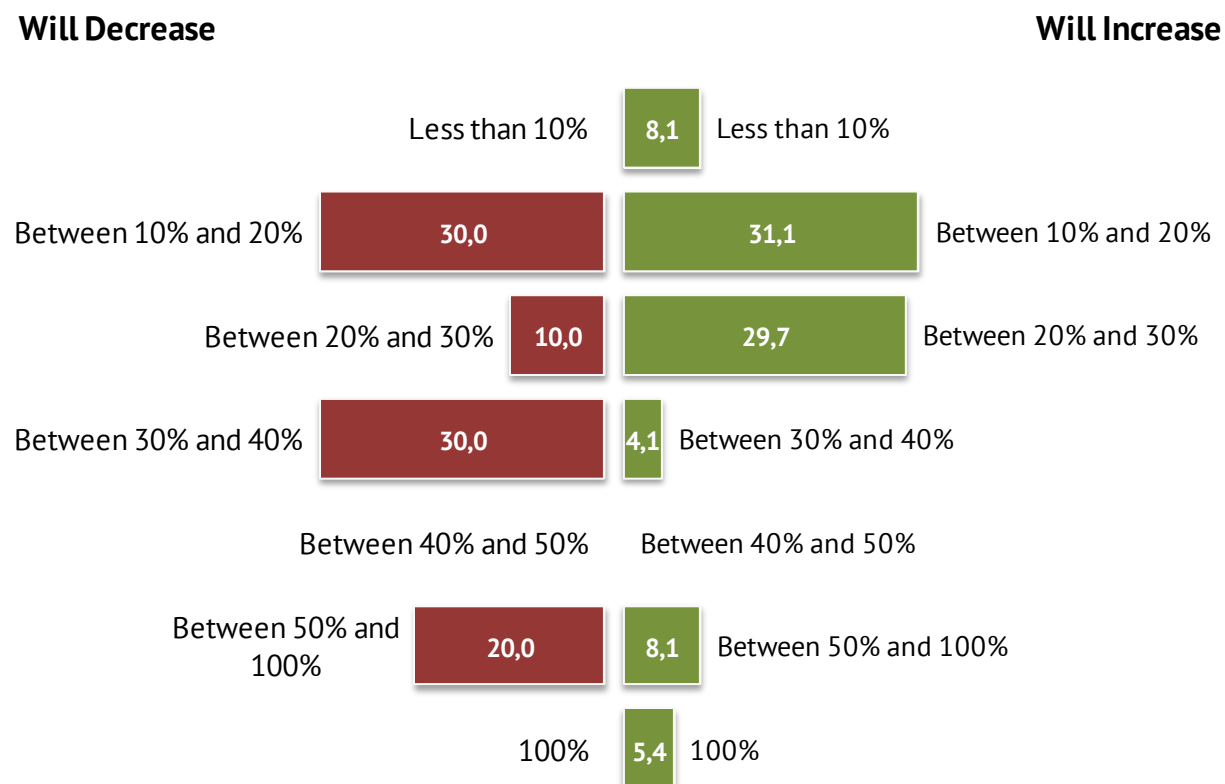


*N=118, closed single answer

PE2.1. DIGITAL BUDGET ESTIMATED EVOLUTIONS



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



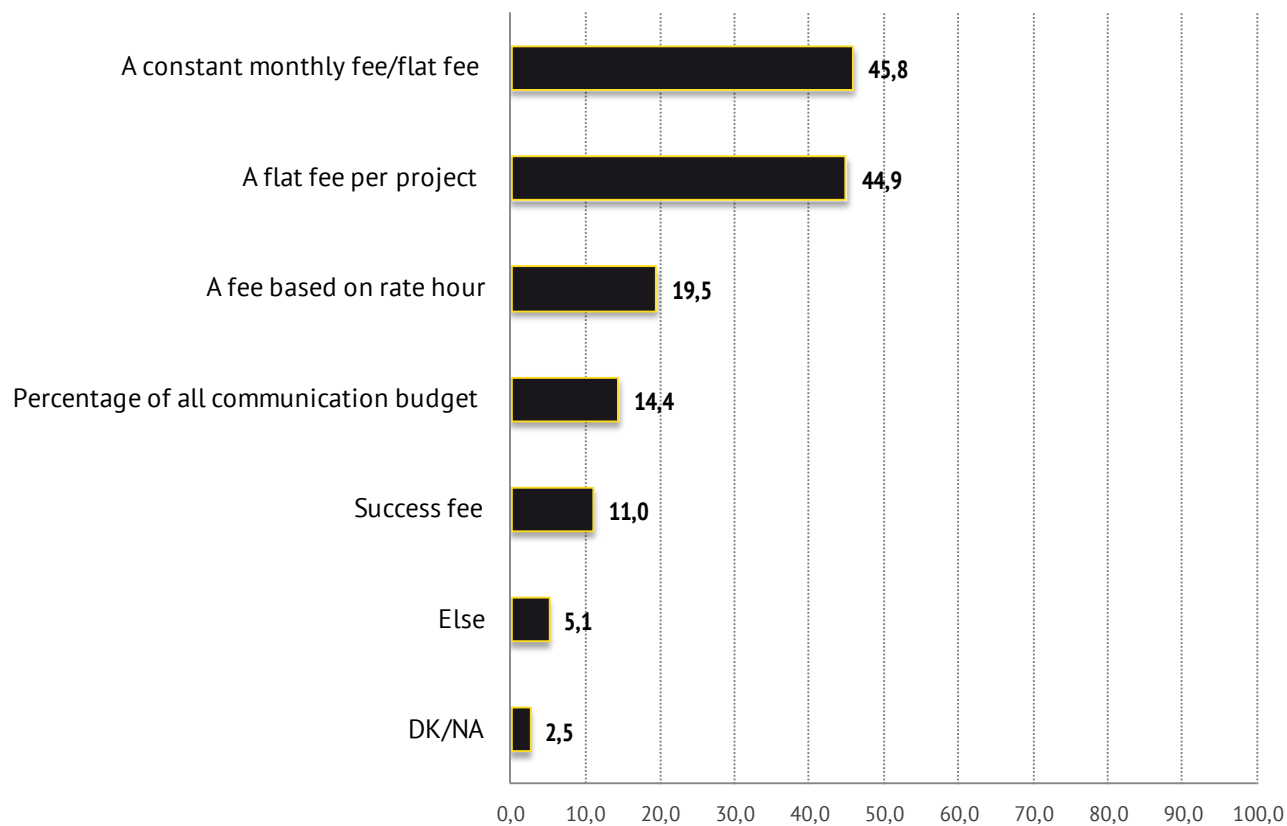
*N=74 participants estimating answering “increase” at the previous question, closed single answer

*N=10 participants estimating answering “decrease” at the previous question, closed single answer

PE3. TIPES OF REMUNERATION



Which of the following forms of remuneration for the employed digital agencies, were adopted by your company in 2013?

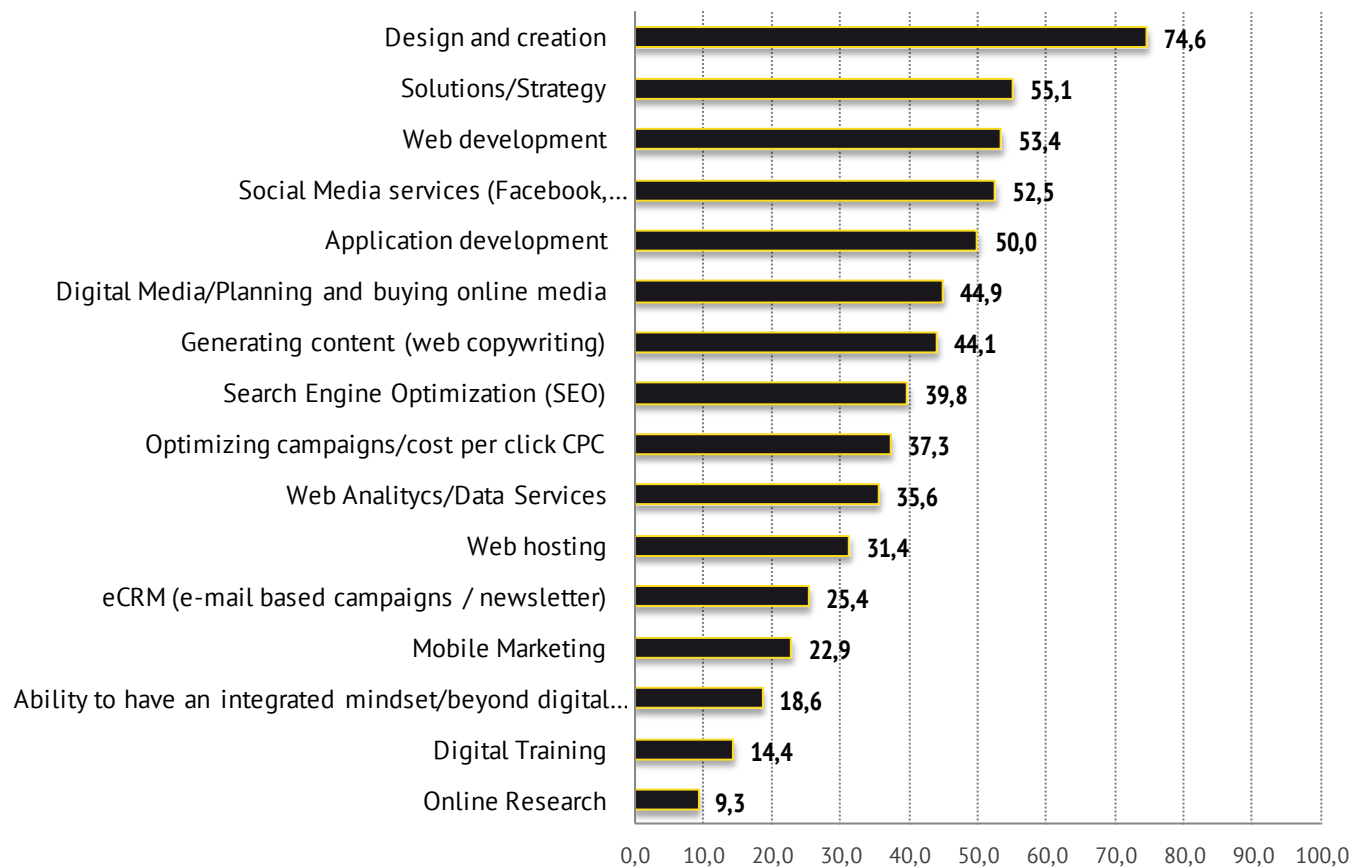


*N=118, closed multiple answers

S1.1. SPECIALIZED SERVICES PROVIDED



At this moment, which of the following specialized services are provided to you by the digital agency?

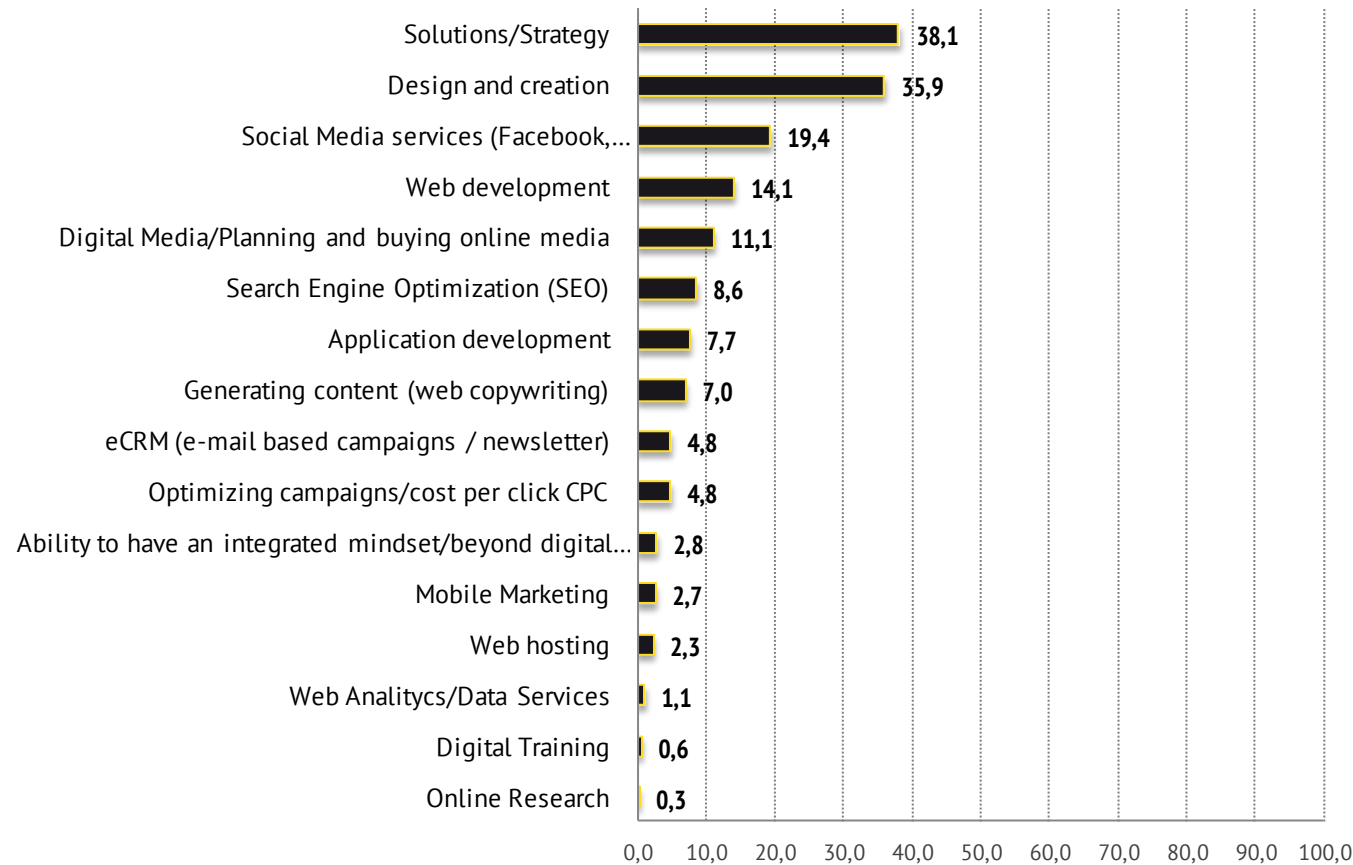


*N=118, closed multiple answers

S1.2. TOP 3 SPECIALIZED SERVICES IN 2014



Which of the following services do you think will be most important for your company in 2014?

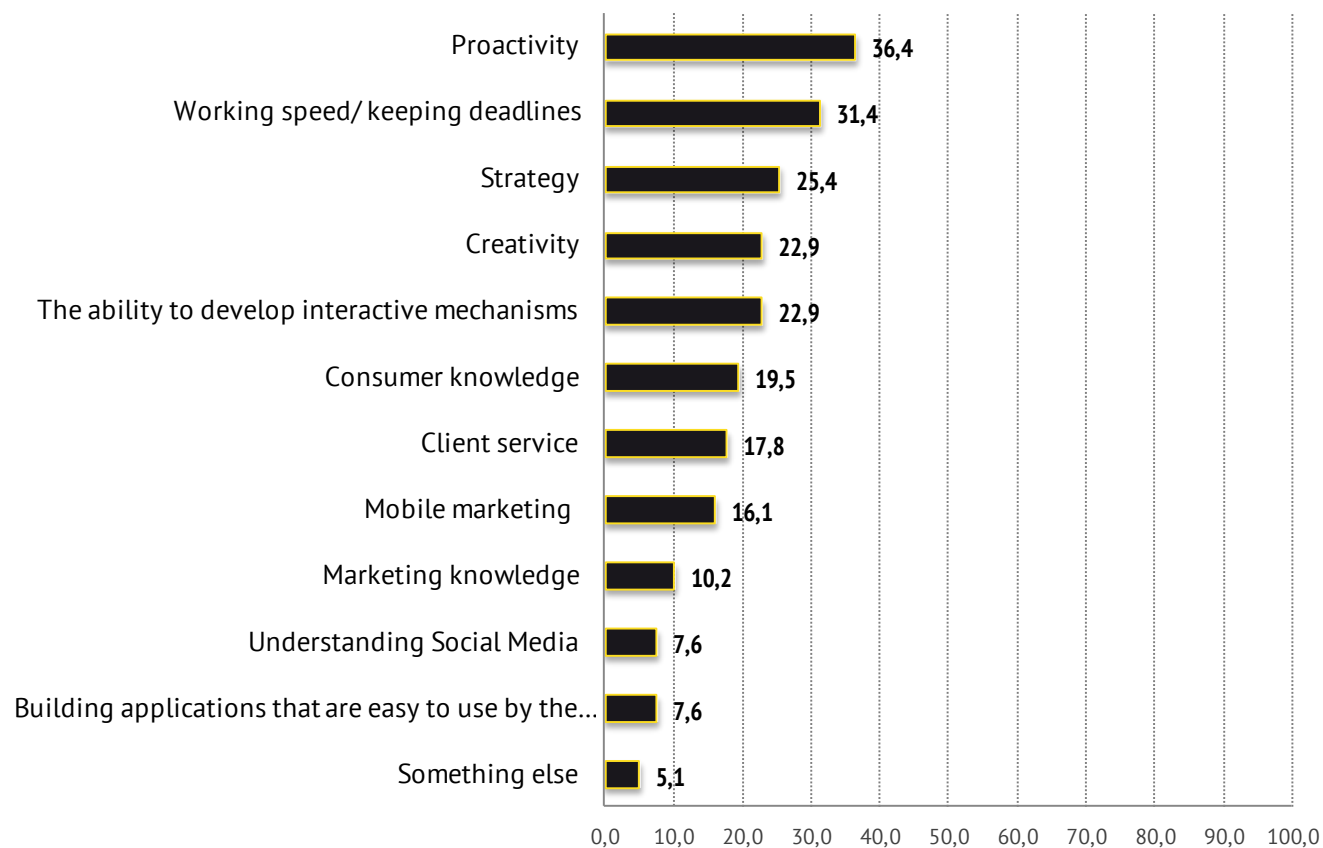


*N=118, closed top3 answers

S2. AREAS OF IMPROVEMENT



In which of the following areas do you consider the digital agencies your company worked with in 2013 should improve?

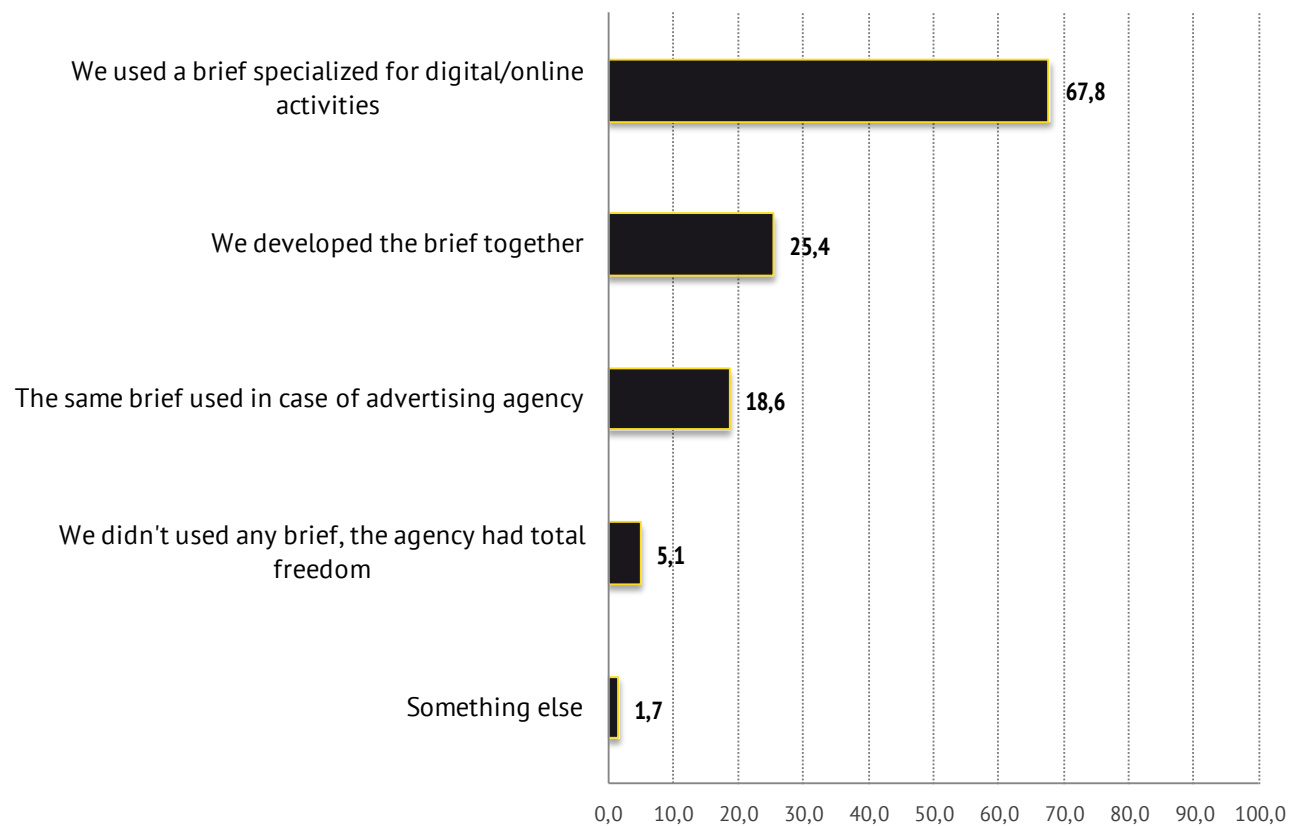


*N=118, closed multiple answers

S3. DIGITAL AGENCY BRIEFING



Which of the following sentences describe best the way your company worked with the digital agency chosen in 2013?

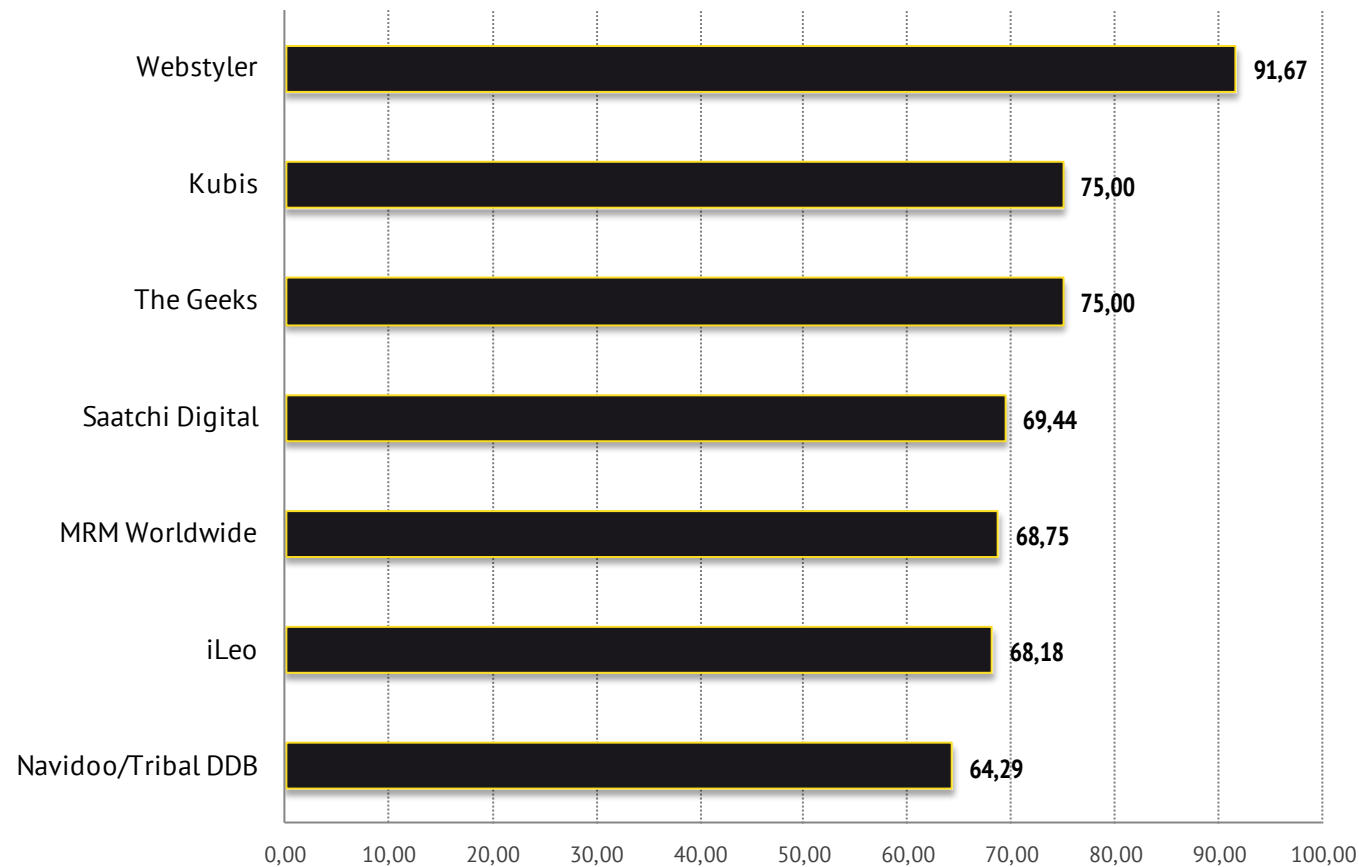


*N=118, closed multiple answers

L1.1. SATISFACTION WITH THE 2013 PERFORMANCE



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

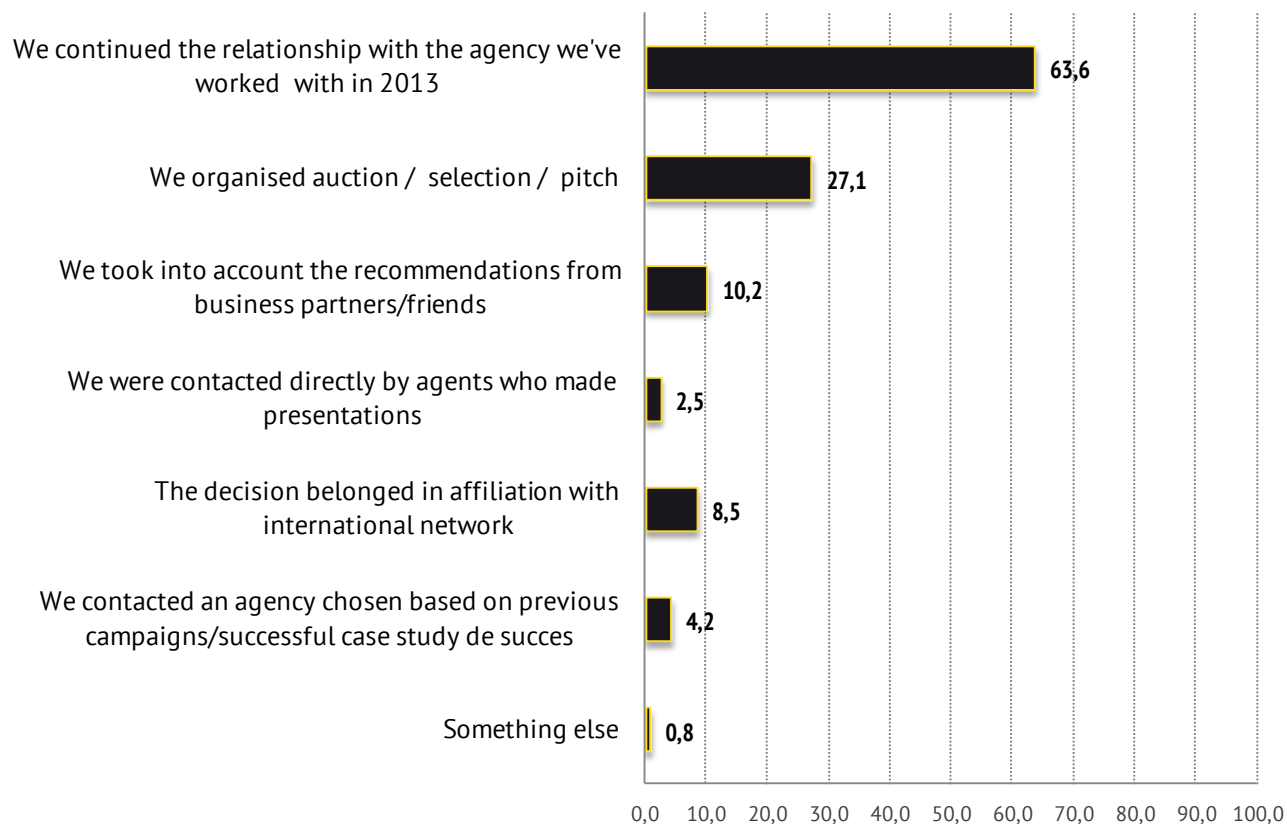


* the number of evaluations for each company are rather low ranging between 22 evaluations for Webstyler and 6 evaluations for iLeo; five point Likert type scale: 1 less satisfied ... 5 most satisfied

L2. DIGITAL AGENCY DECISION



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

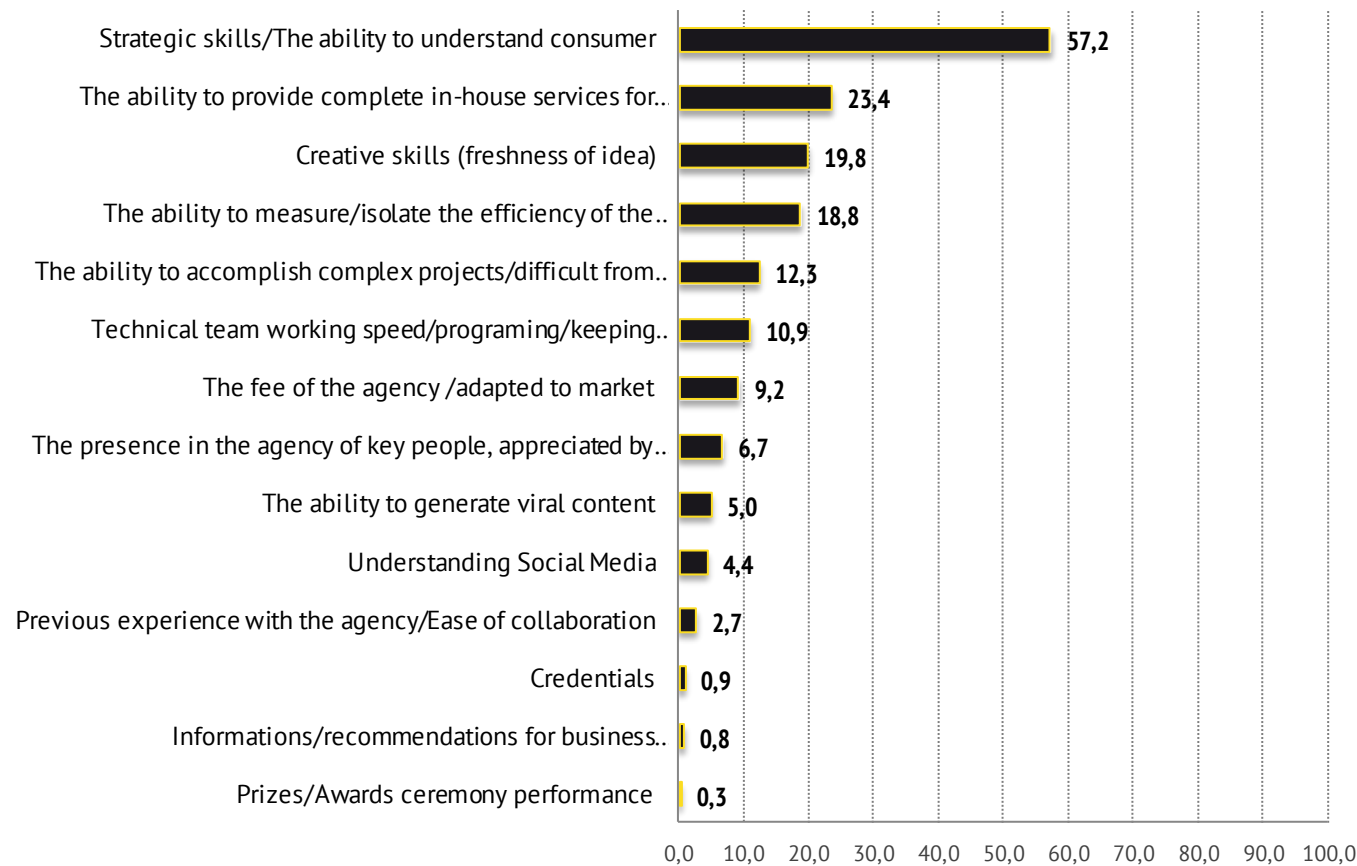


*N=118, closed multiple answers

L3. TOP 3 CRITERIA FOR ASSESSMENT OF DIGITAL AGENCIES



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



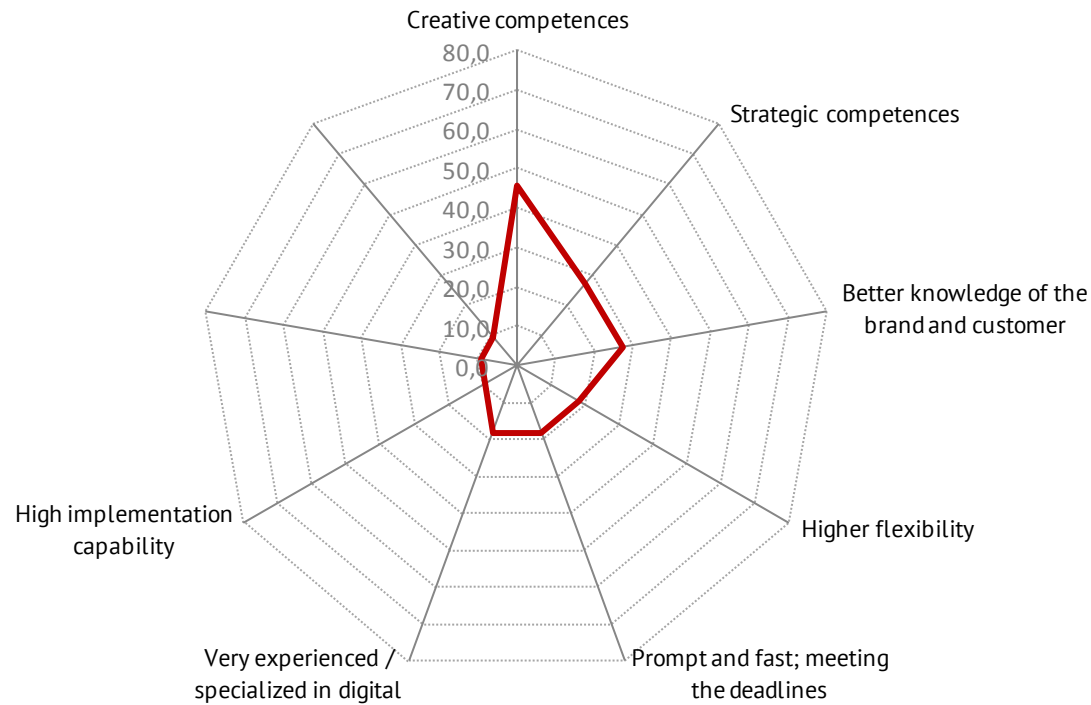
*N=118, closed top 3 answers

L4.1.TOP 3 STRENGTHS EMPLOYEDDIGITAL AGENCY



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

iLEO



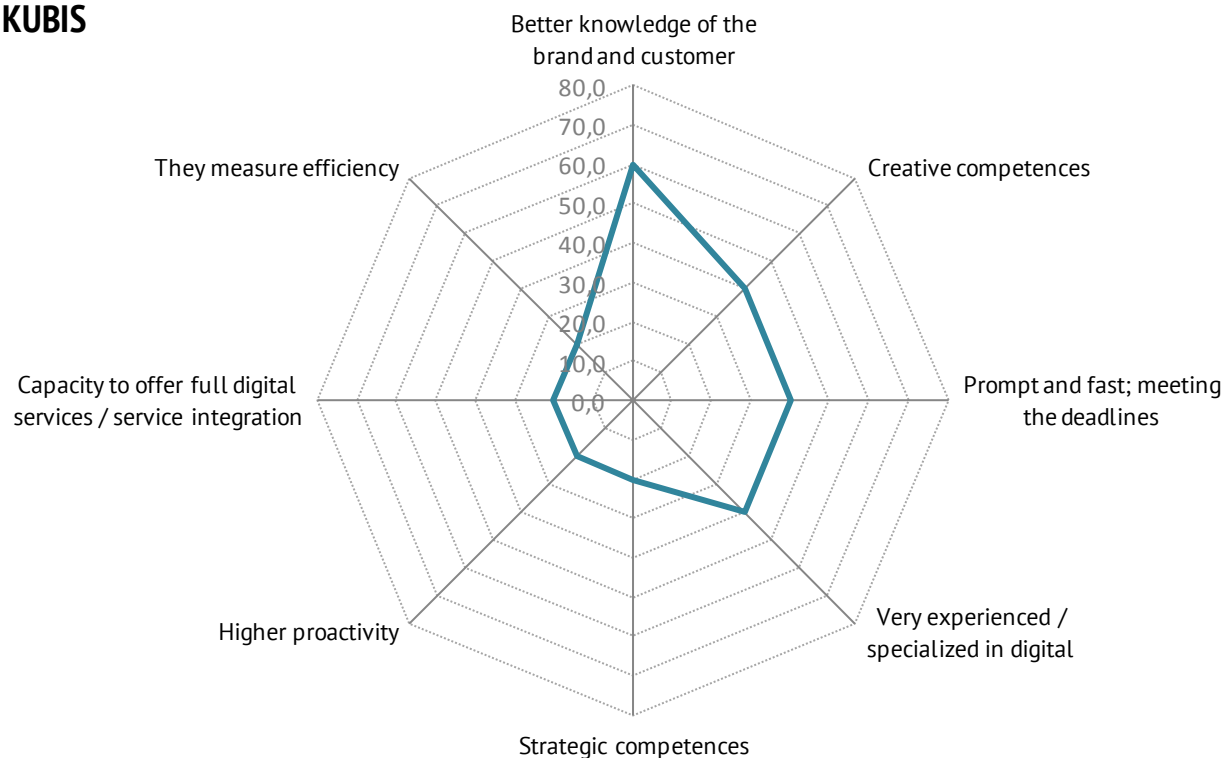
*N=11 participants that assessed the company, open top 3 answers
 *strengths are spontaneously mentioned; values are percentages out of N

L4.2. TOP 3 STRENGTHS EMPLOYEDDIGITAL AGENCY



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

KUBIS



*N=5 participants that assessed the company, open top 3 answers

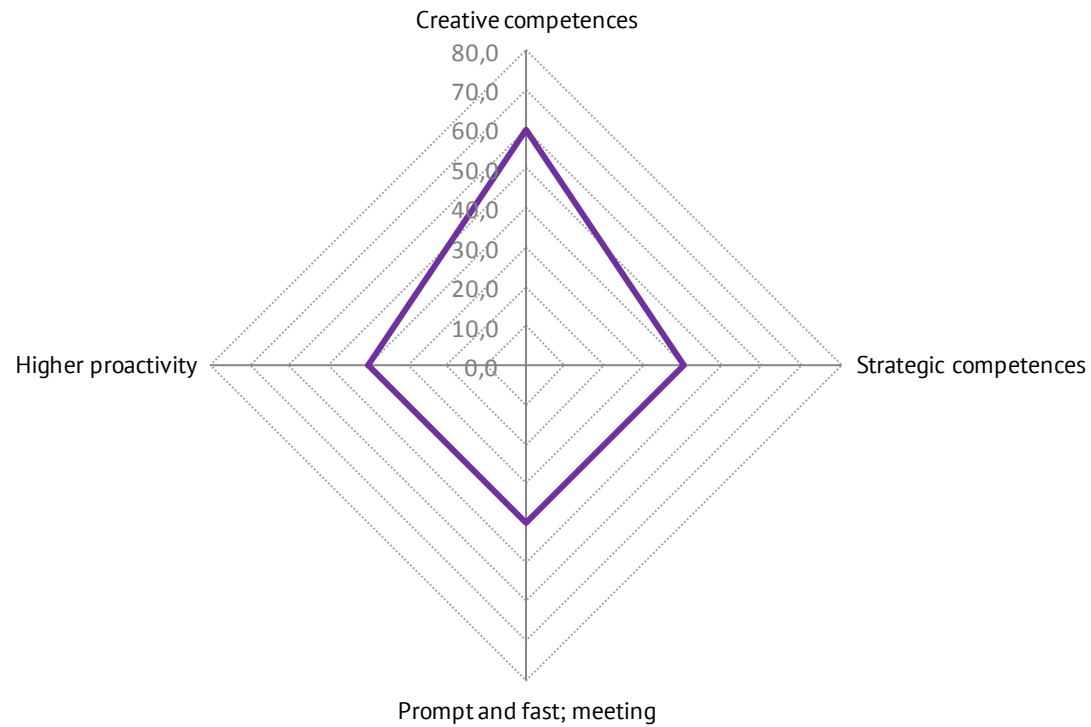
*strengths are spontaneously mentioned; values are percentages out of N

L4.3. TOP 3 STRENGTHS EMPLOYED DIGITAL AGENCY



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

MRM WORLDWIDE



*N=5 participants that assessed the company, open top 3 answers

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

L4.4. TOP 3 STRENGTHS EMPLOYED DIGITAL AGENCY



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

NAVIDOO / TRIBAL DDB



*N=7 participants that assessed the company, open top 3 answers

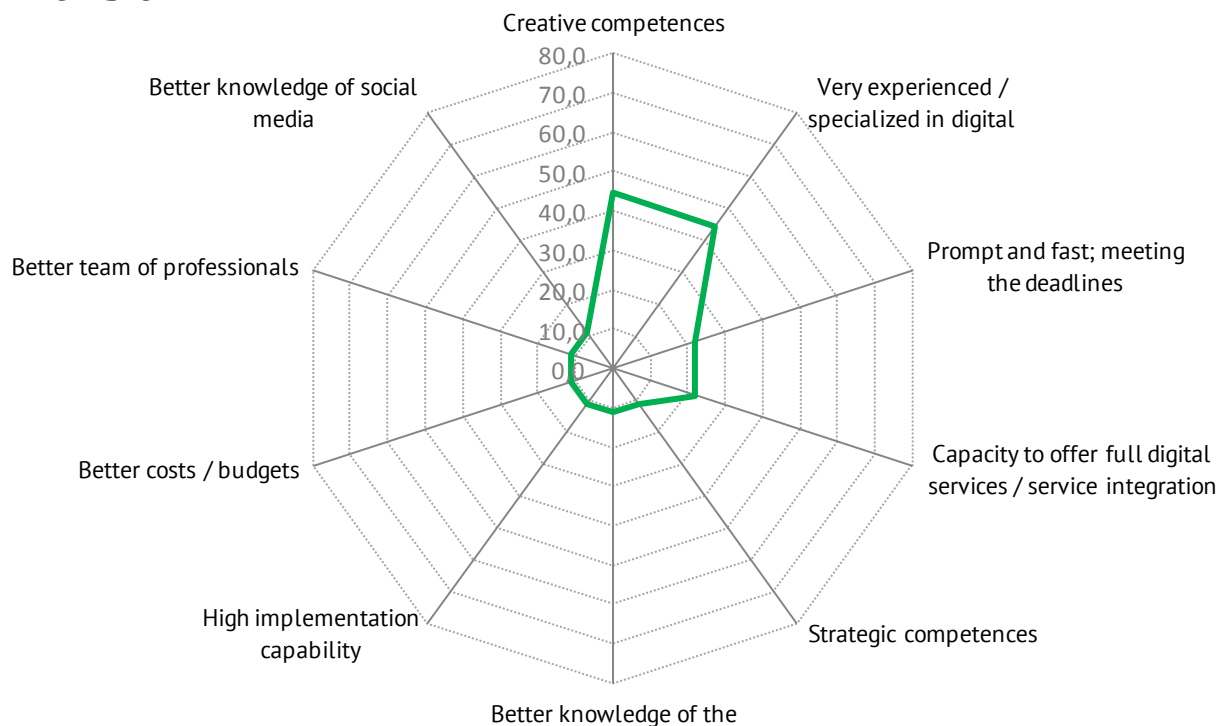
*strengths are spontaneously mentioned; values are percentages out of N

L4.5. TOP 3 STRENGTHS EMPLOYED DIGITAL AGENCY



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

SAATCHI DIGITAL



*N=9 participants that assessed the company, open top 3 answers

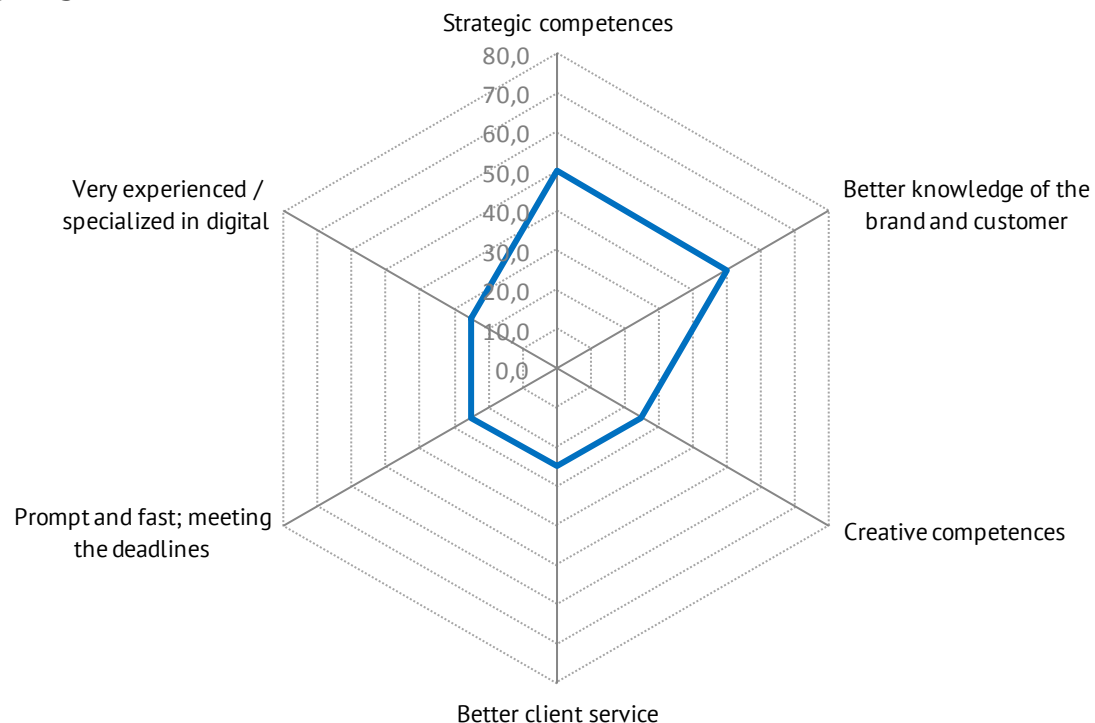
*strengths are spontaneously mentioned; values are percentages out of N

L4.6. TOP 3 STRENGTHS EMPLOYED DIGITAL AGENCY



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

THE GEEKS



*N=4 participants that assessed the company, open top 3 answers

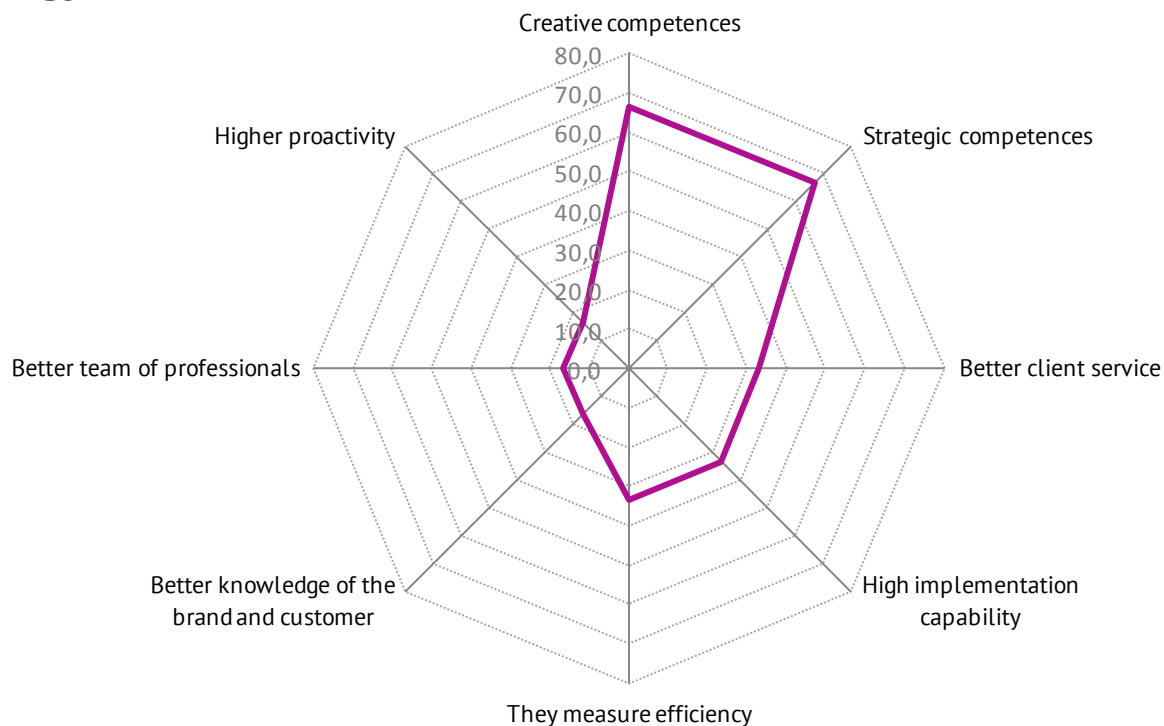
*strengths are spontaneously mentioned; values are percentages out of N

L4.7. TOP 3 STRENGTHS EMPLOYED DIGITAL AGENCY



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

WEBSTYLER



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

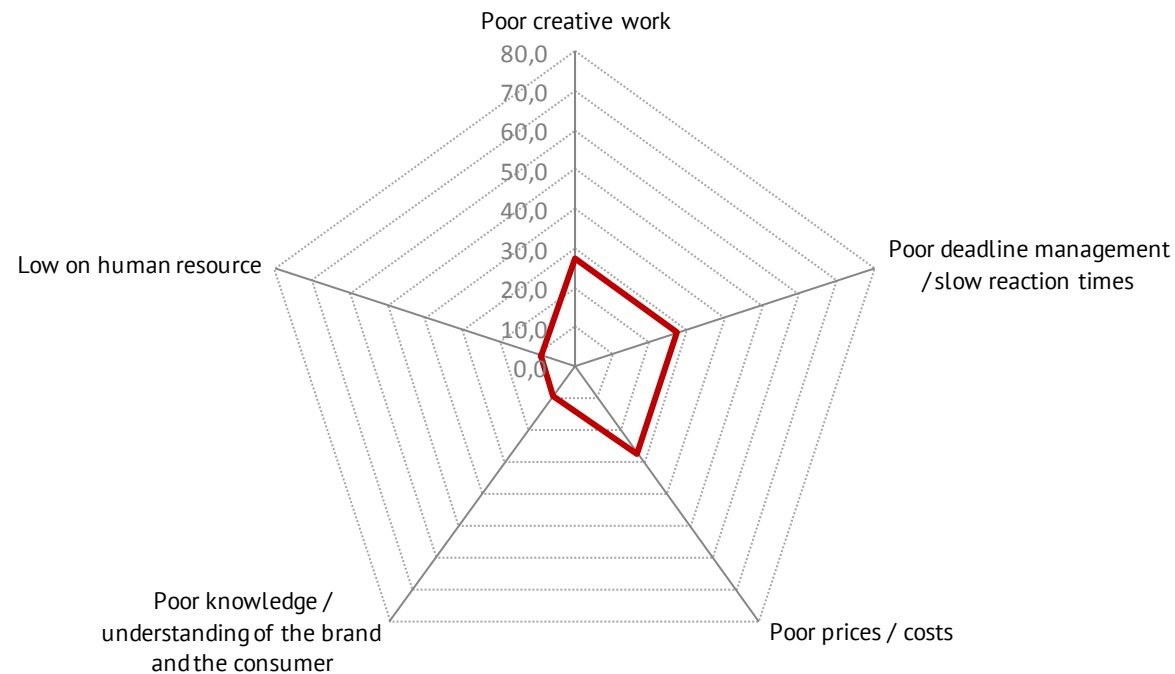
*strengths are spontaneously mentioned; values are percentages out of N

L5.1.TOP 3 WEAKNESSES EMPLOYED DIGITAL AGENCY



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

iLEO



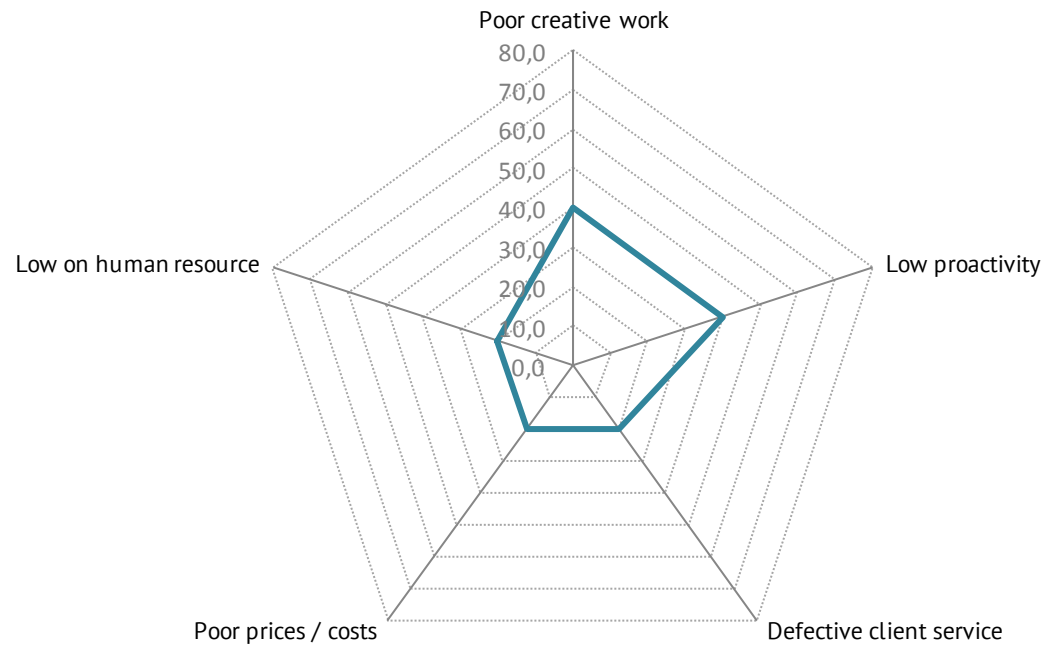
*N=11 participants that assessed the company, open top 3 answers
*weaknesses are spontaneously mentioned; values are percentages out of N

L5.2. TOP 3 WEAKNESSES EMPLOYED DIGITAL AGENCY



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

KUBIS



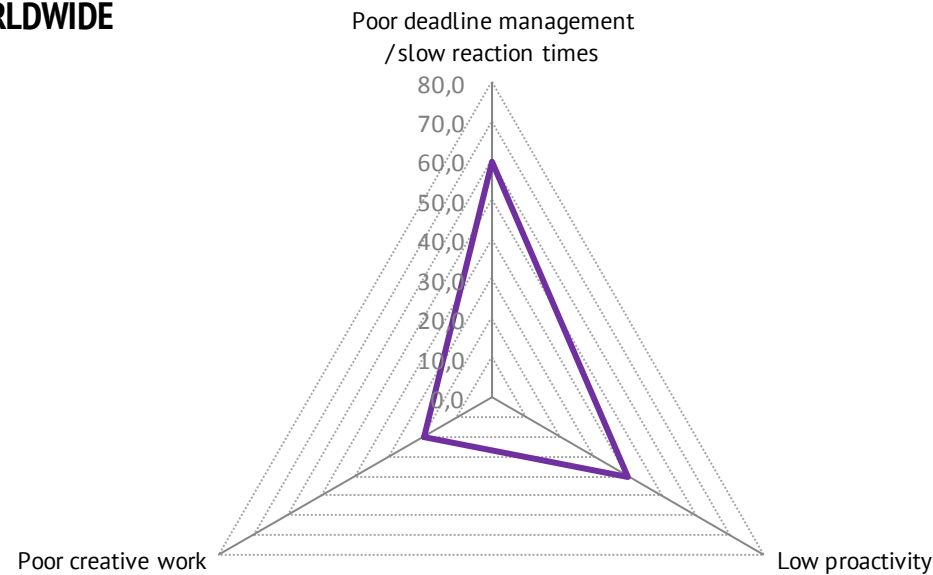
*N=5 participants that assessed the company, open top 3 answers
 *weaknesses are spontaneously mentioned; values are percentages out of N

L5.3. TOP 3 WEAKNESSES EMPLOYED DIGITAL AGENCY



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

MRM WORLDWIDE



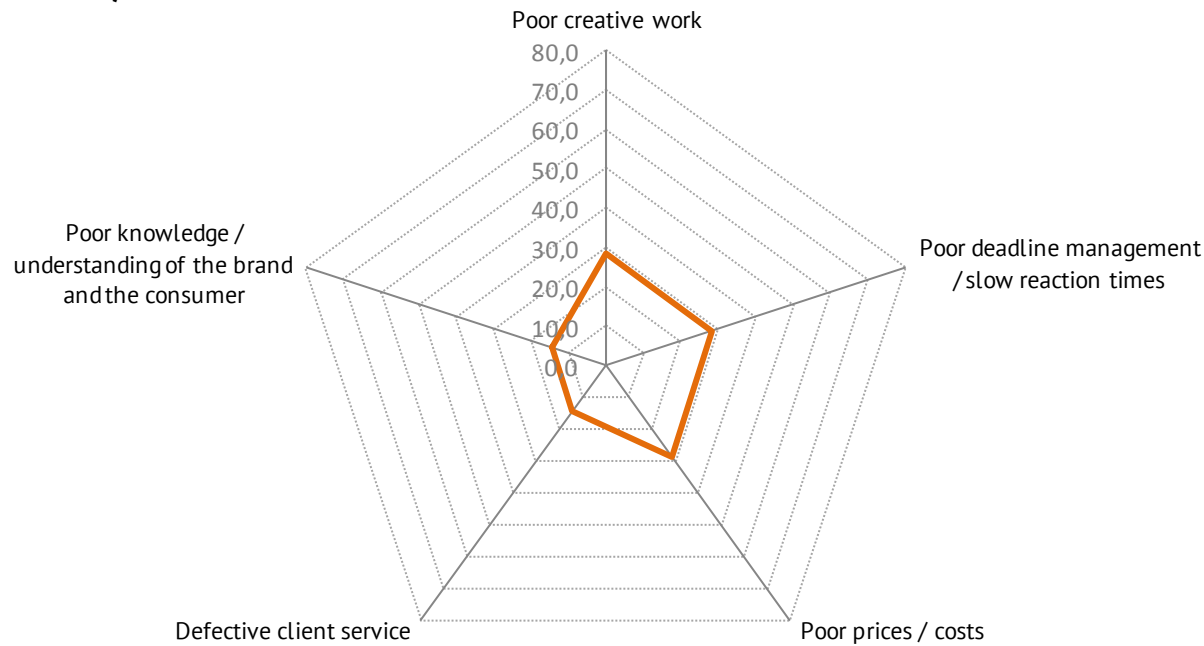
*N=5 participants that assessed the company, open top 3 answers
*weaknesses are spontaneously mentioned; values are percentages out of N

L5.4. TOP 3 WEAKNESSES EMPLOYED DIGITAL AGENCY



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

NAVIDOO / TRIBAL DDB



*N=7 participants that assessed the company, open top 3 answers

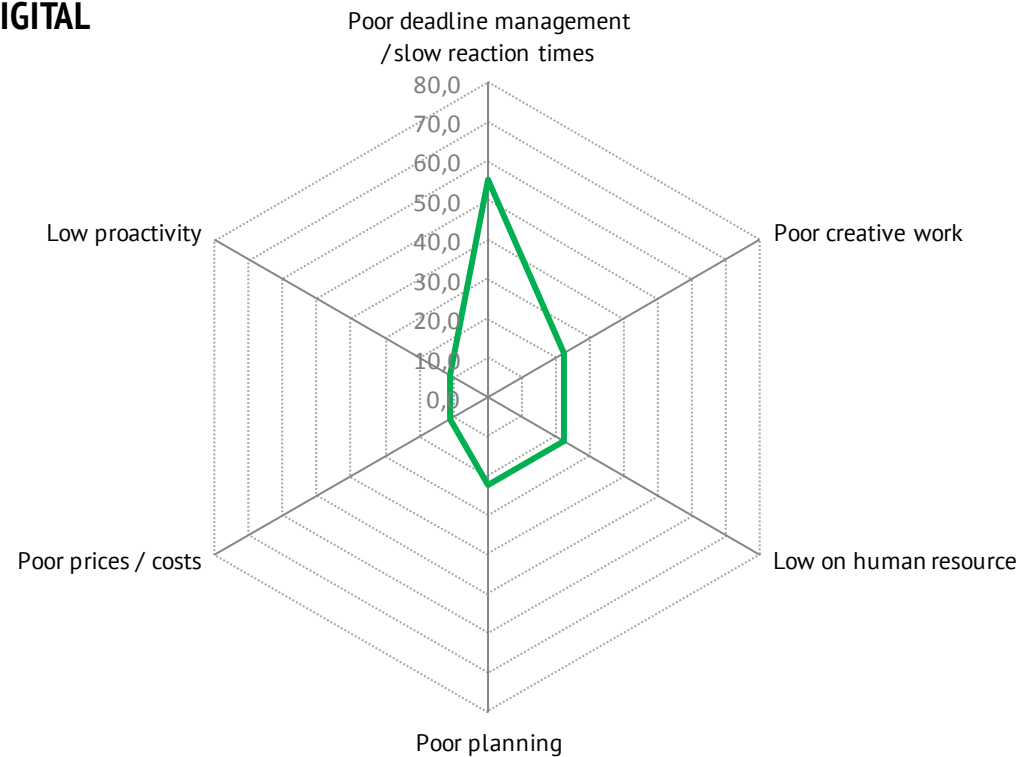
*weaknesses are spontaneously mentioned; values are percentages out of N

L5.5. TOP 3 WEAKNESSES EMPLOYED DIGITAL AGENCY



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

SAATCHI DIGITAL



*N=9 participants that assessed the company, open top 3 answers

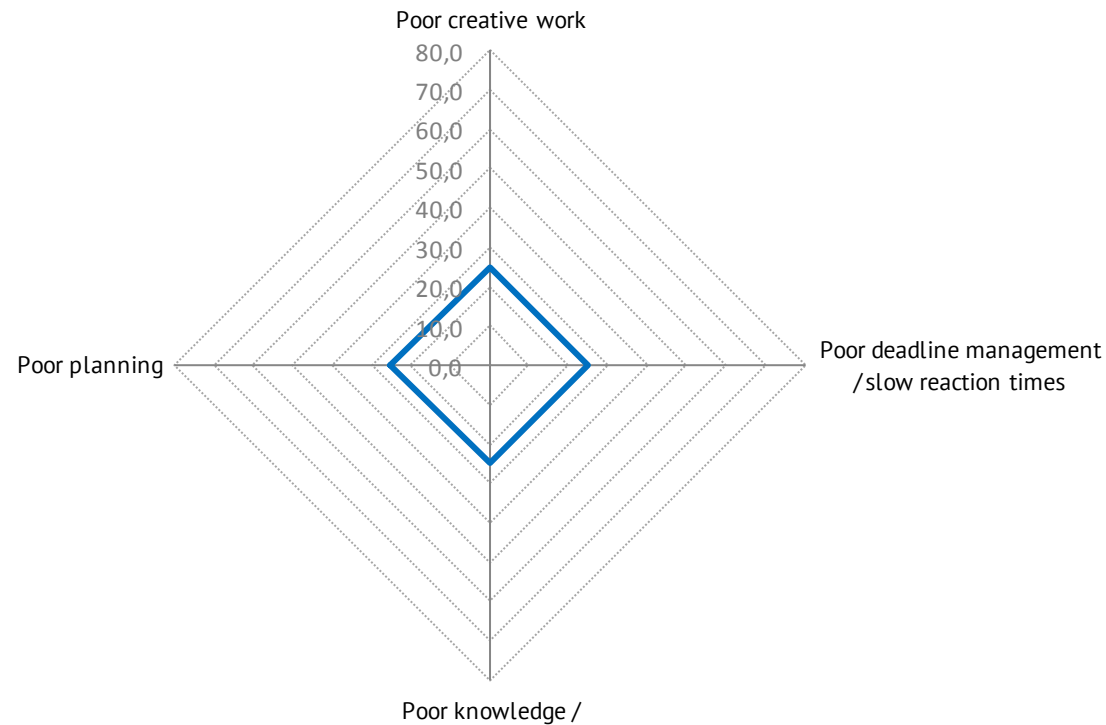
*weaknesses are spontaneously mentioned; values are percentages out of N

L5.6. TOP 3 WEAKNESSES EMPLOYED DIGITAL AGENCY



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

THE GEEKS



*N=4 participants that assessed the company, open top 3 answers

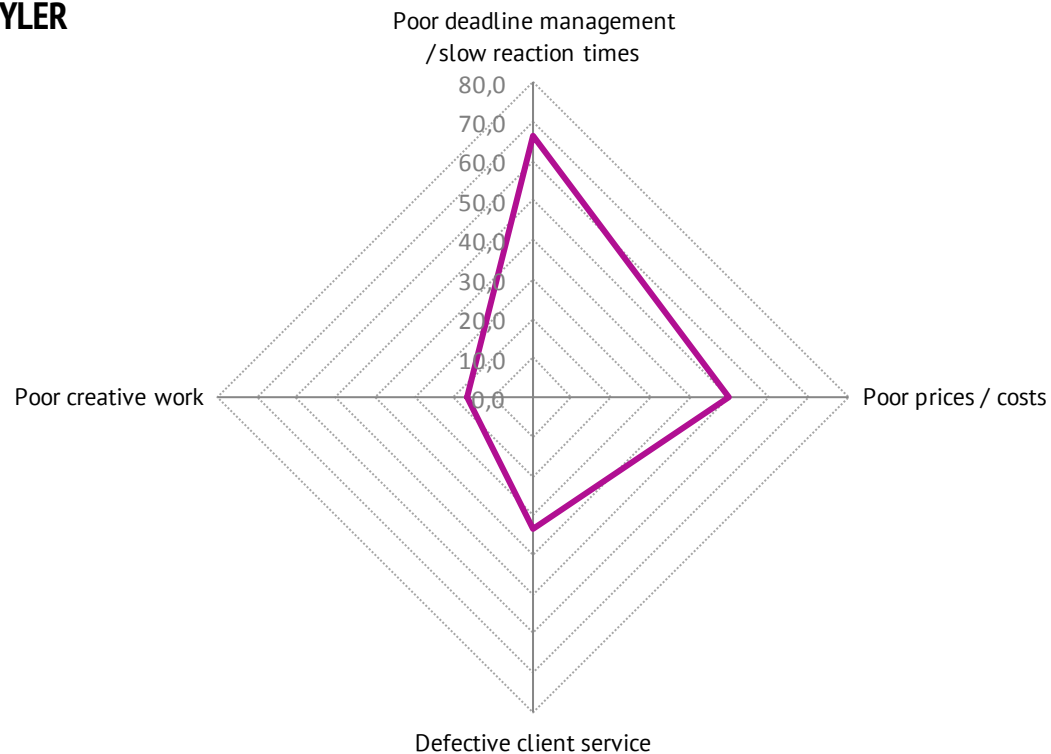
*weaknesses are spontaneously mentioned; values are percentages out of N

L5.7. TOP 3 WEAKNESSES EMPLOYED DIGITAL AGENCY



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

WEBSTYLER

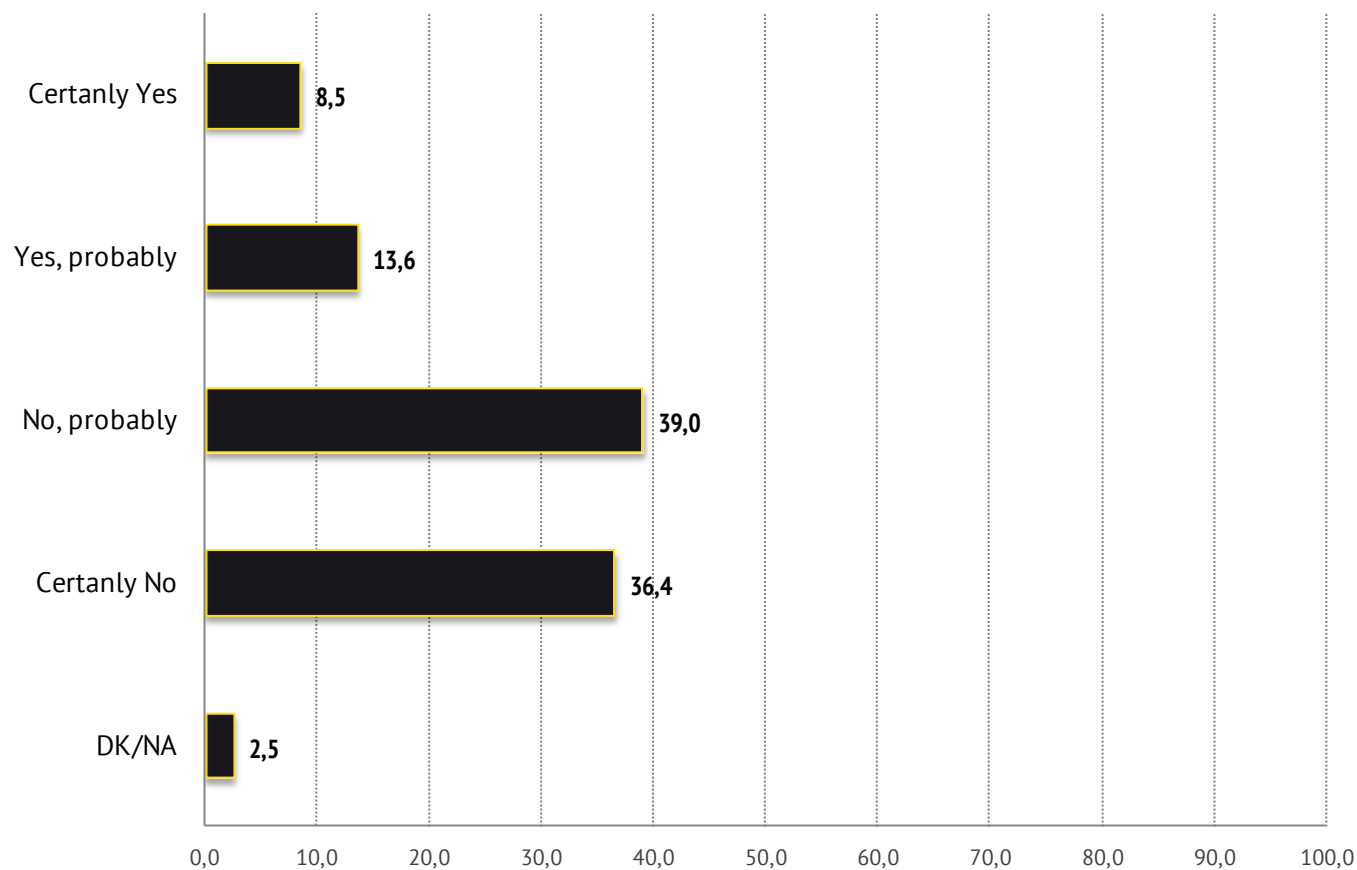


*N=6 participants that assessed the company, open top 3 answers
*weaknesses are spontaneously mentioned; values are percentages out of N

L6. INTENTION TO SWITCH THE DIGITAL AGENCY



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

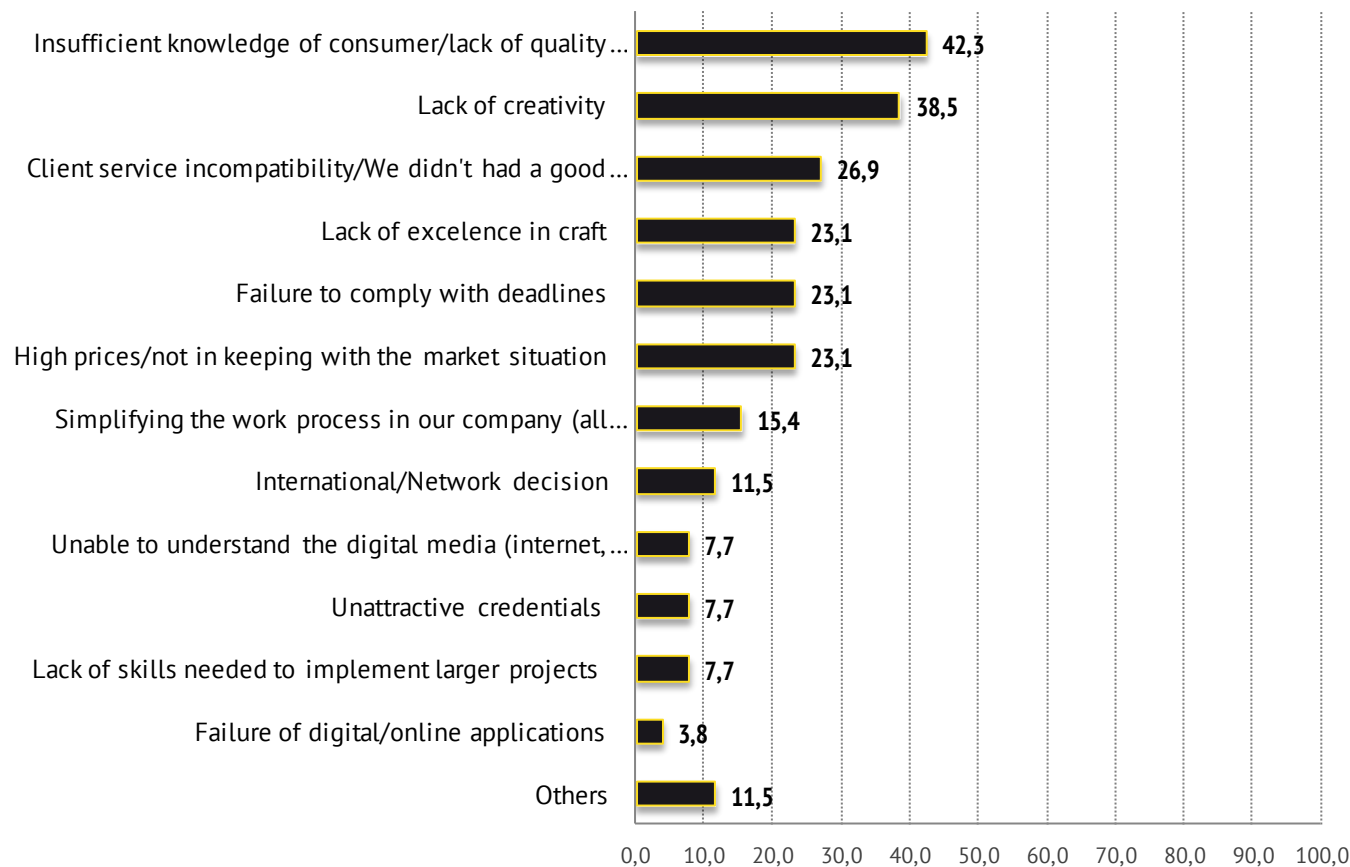


*N=118, closed single answer

L7. TOP 3 REASONS TO END THE COLLABORATION



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

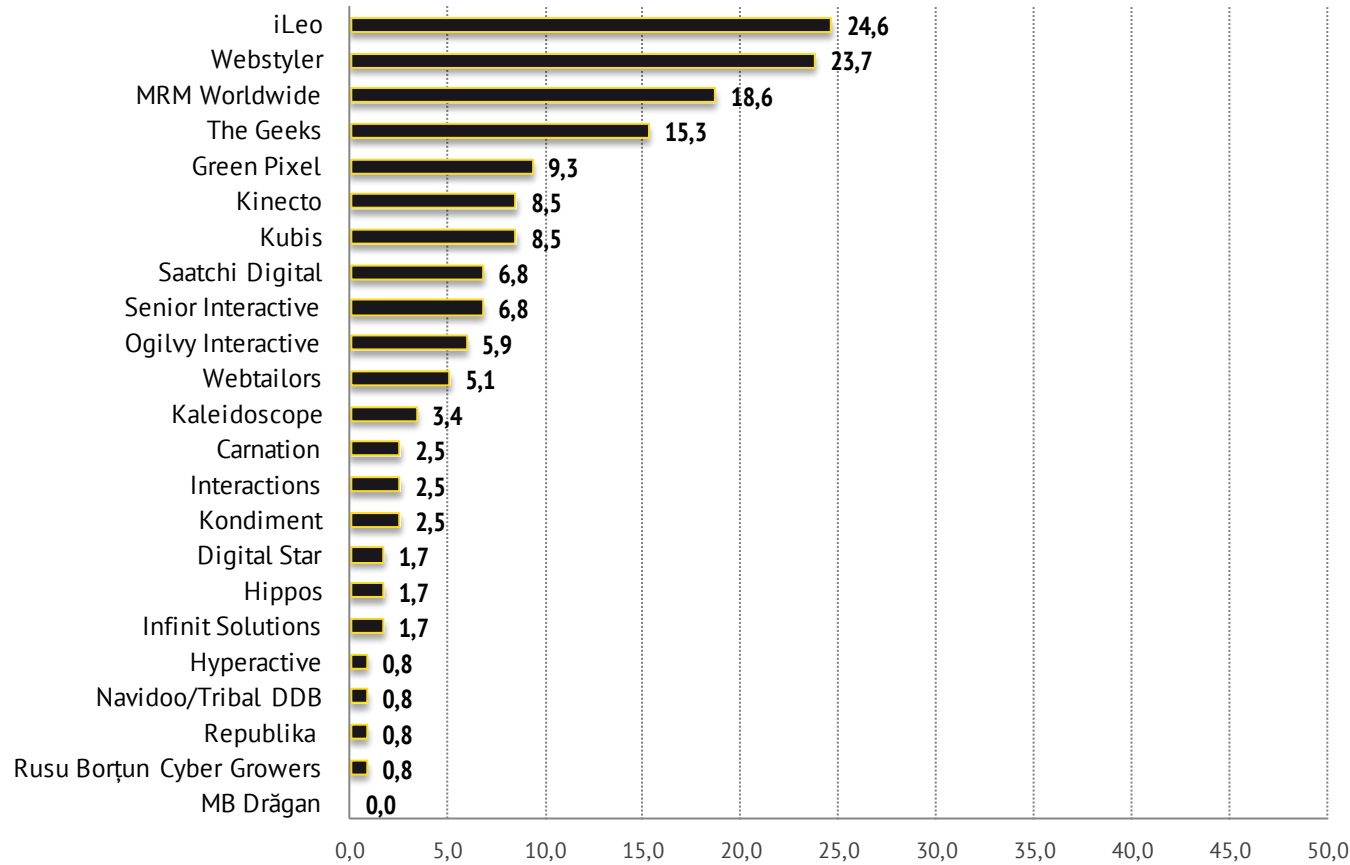


*N=26, participants responding "yes" or "probably yes" to the previous question, open top 3 answers

L8. STRONGEST PITCH REFERENCE COMPANIES



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

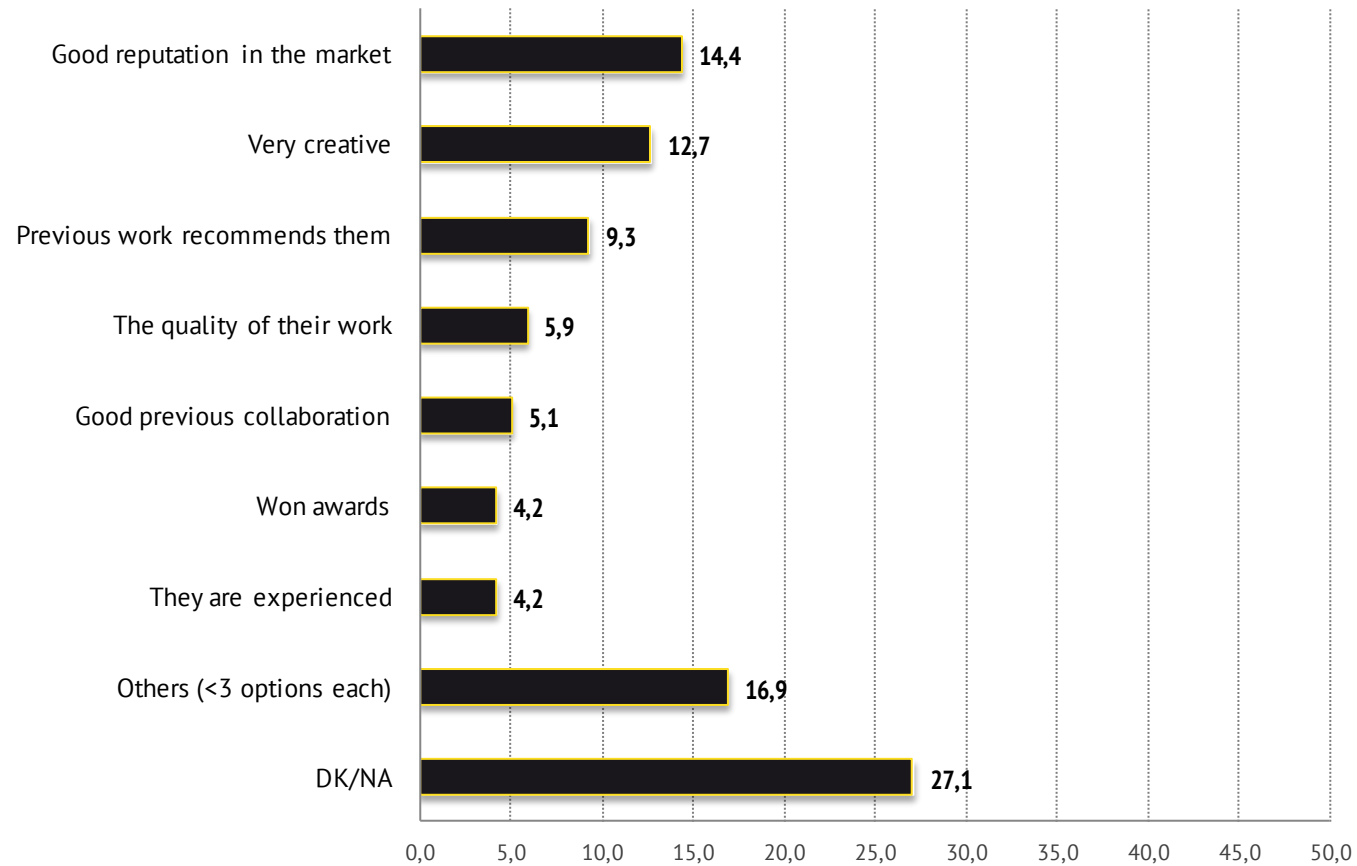


*N=118, open multiple answers

L9. REASON WHY (PREVIOUS QUESTION)



Please briefly explain your choice

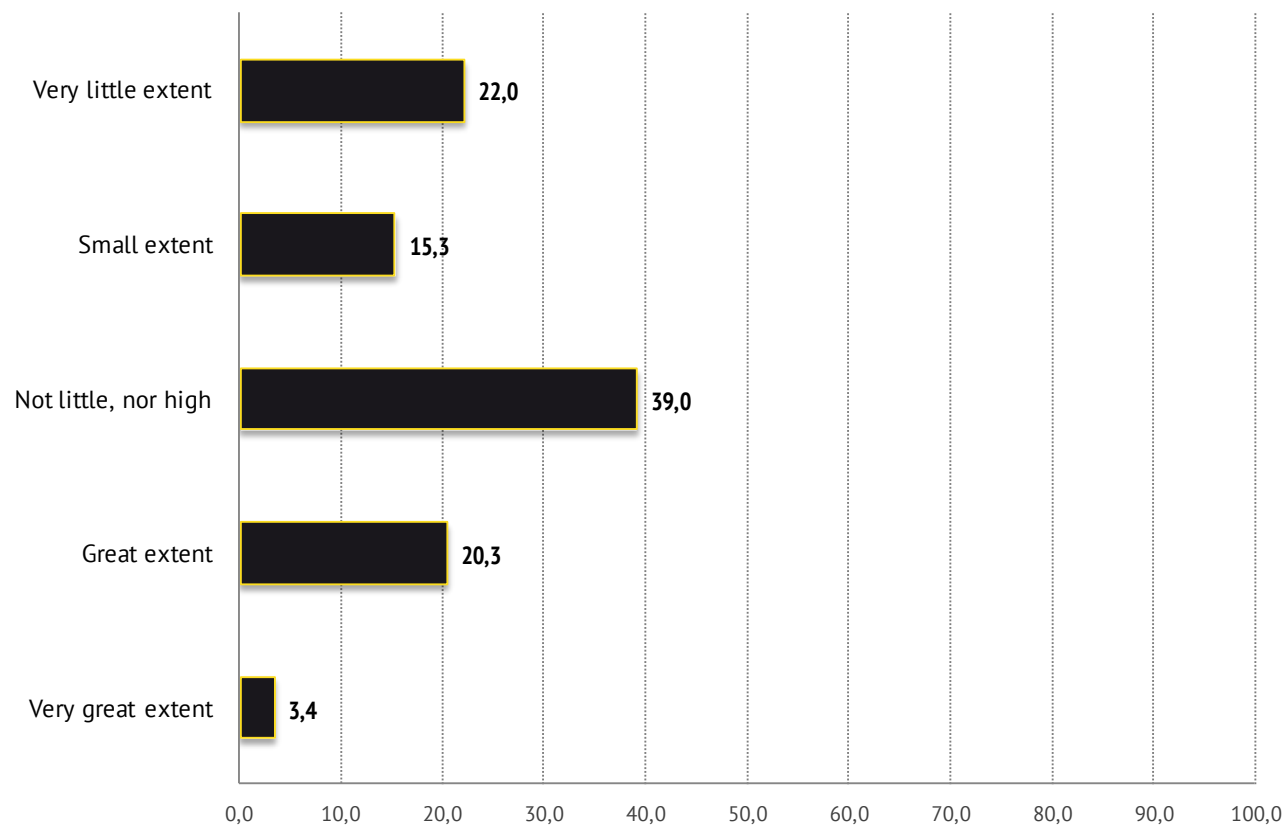


*N=118, open top 3 answers

DA1.DIGITAL AWARDS



To what extent the awards won by a digital agency at the dedicated festivals will influence your decision to pass them your business?

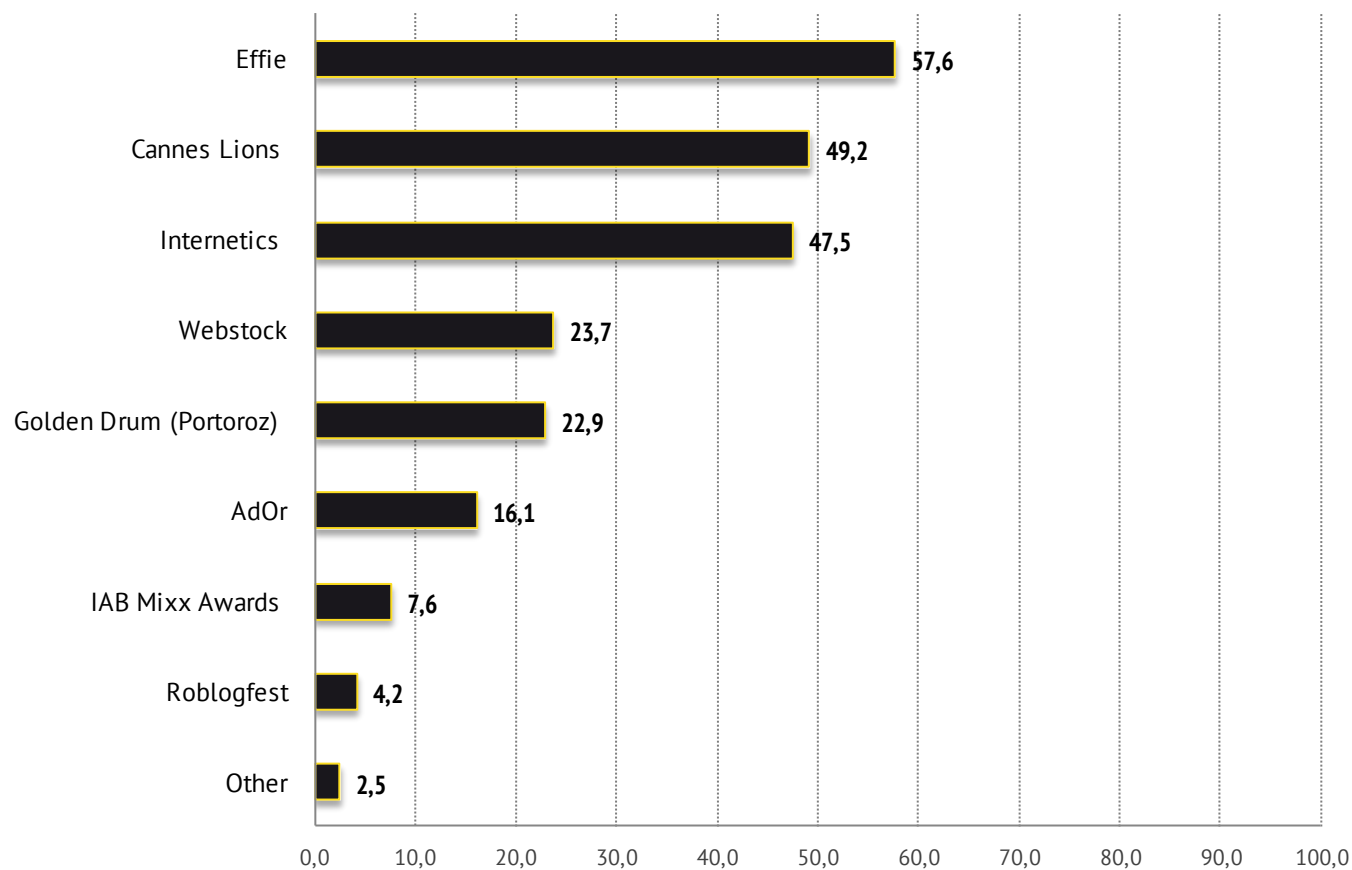


* N=118, five point Likert type scale: 1 low influence ... 5 high influence

DA2.MOST RELEVANT AWARDS



From your point of view, which are the most relevant awards when assessing a digital agency?

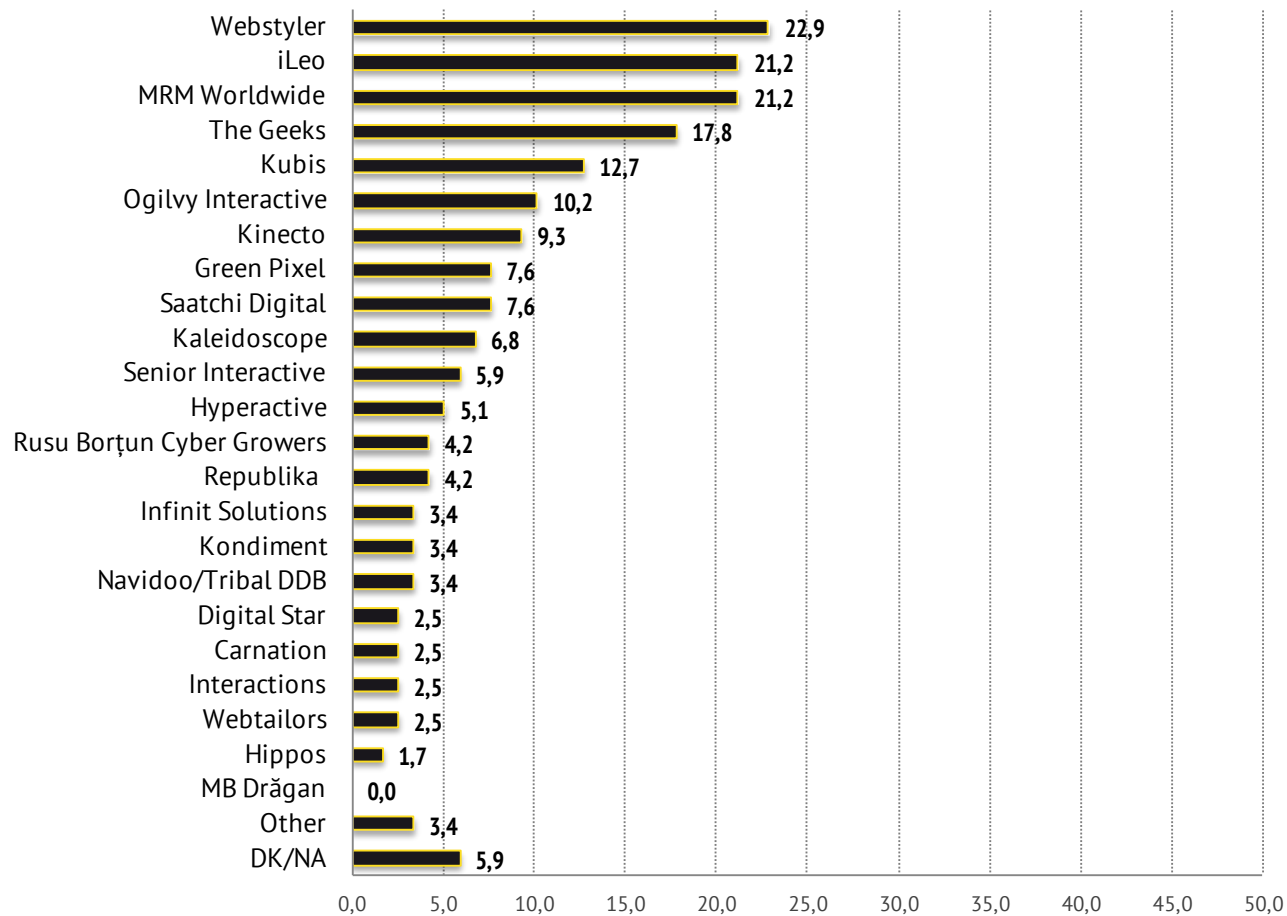


*N=118, open top 3 answers

AG1.MOST CREATIVE DIGITAL AGENCY



In your opinion, which are the most creative digital agencies?

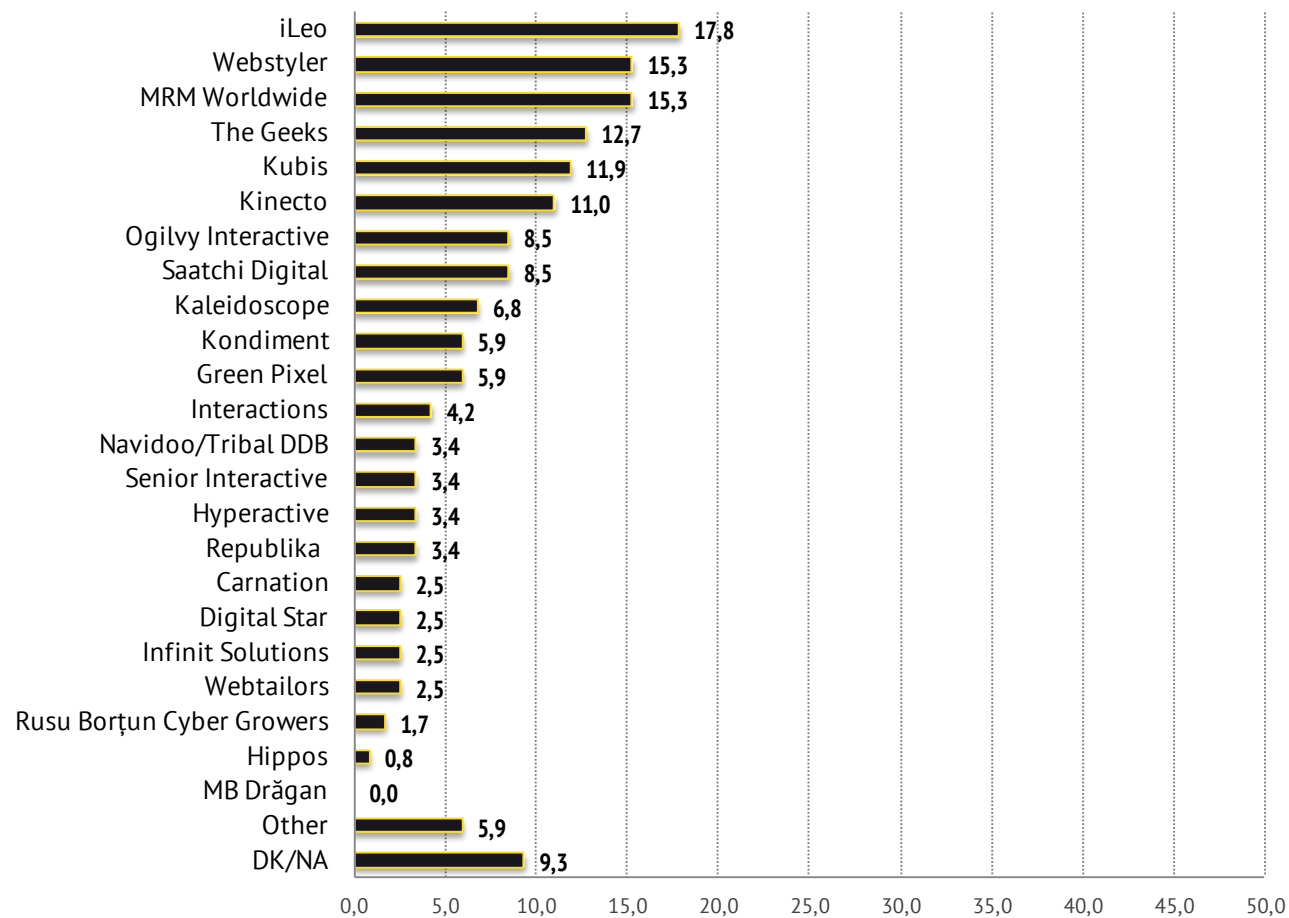


*N=118, closed multiple answers

AG2.BEST STRATEGIC DIGITAL AGENCY



In your opinion, which are the best digital agencies when it comes to strategy?

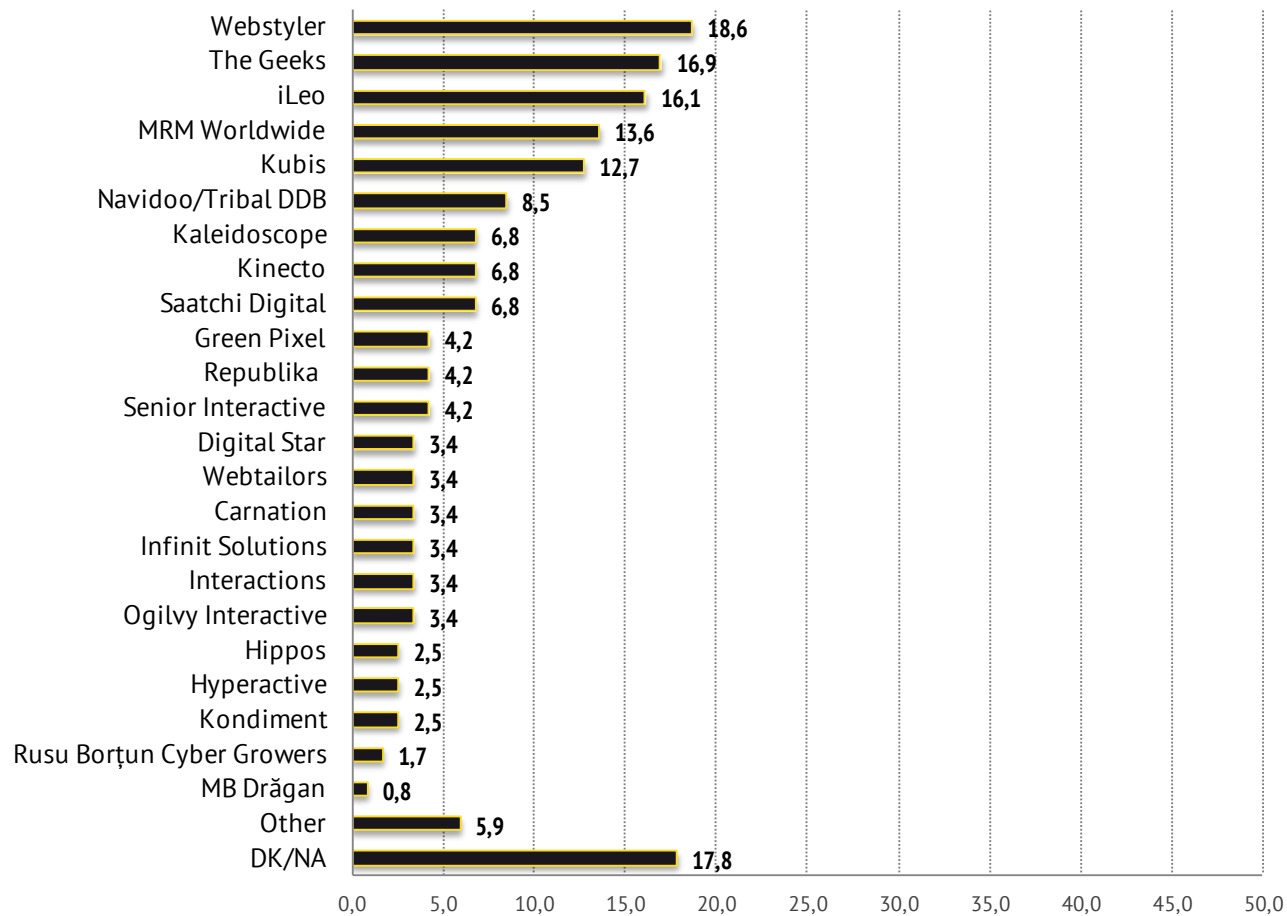


*N=118, closed multiple answers

AG3. BEST DIGITAL AGENCY AT SOCIAL MEDIA



In your opinion, which are the best digital agencies at social media?

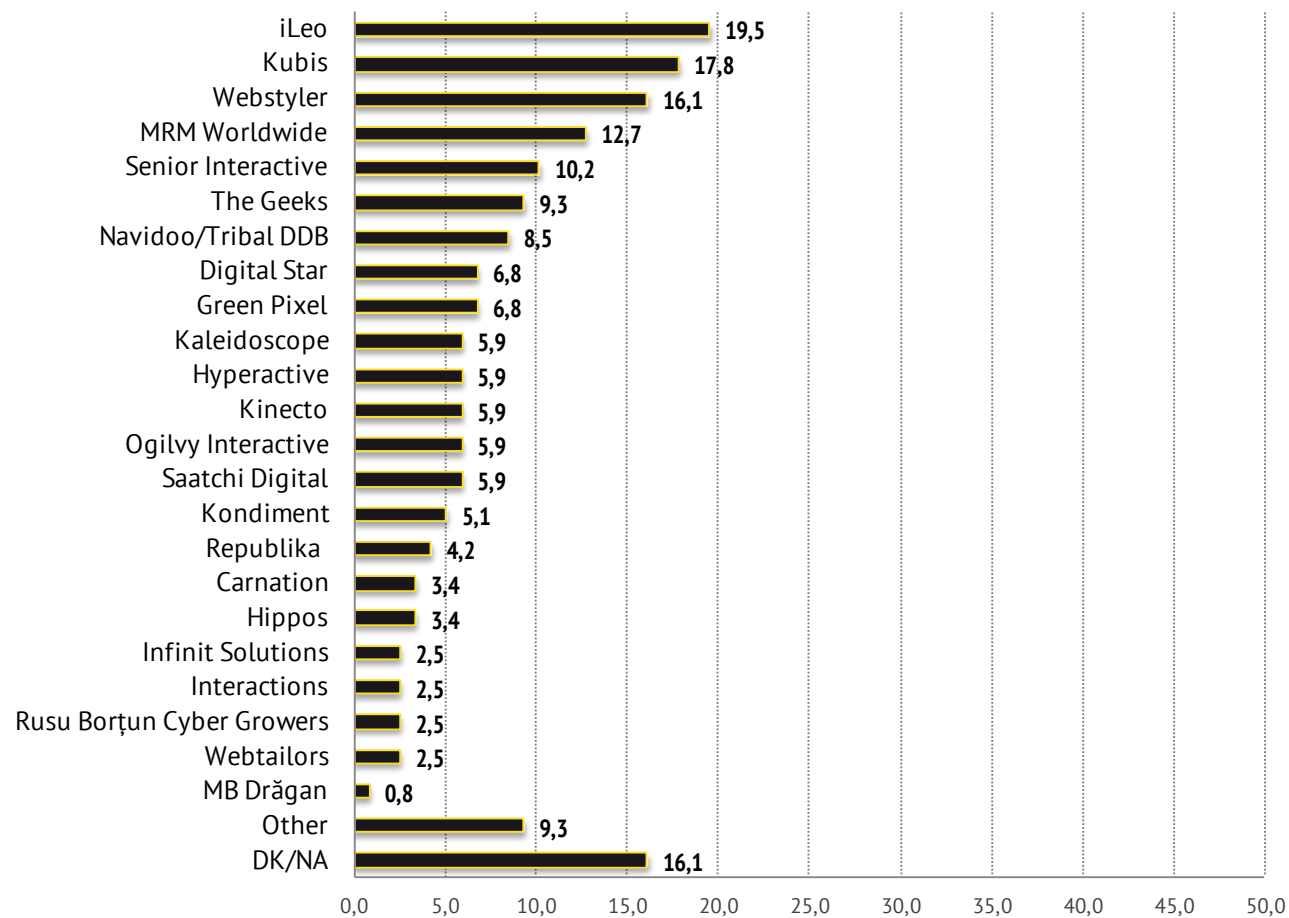


*N=118, closed multiple answers

AG4. BEST DIGITAL AGENCY AT IMPLEMENTING CAMPAIGNS



In your opinion, which digital agencies that have the best technical abilities to implement the campaign?

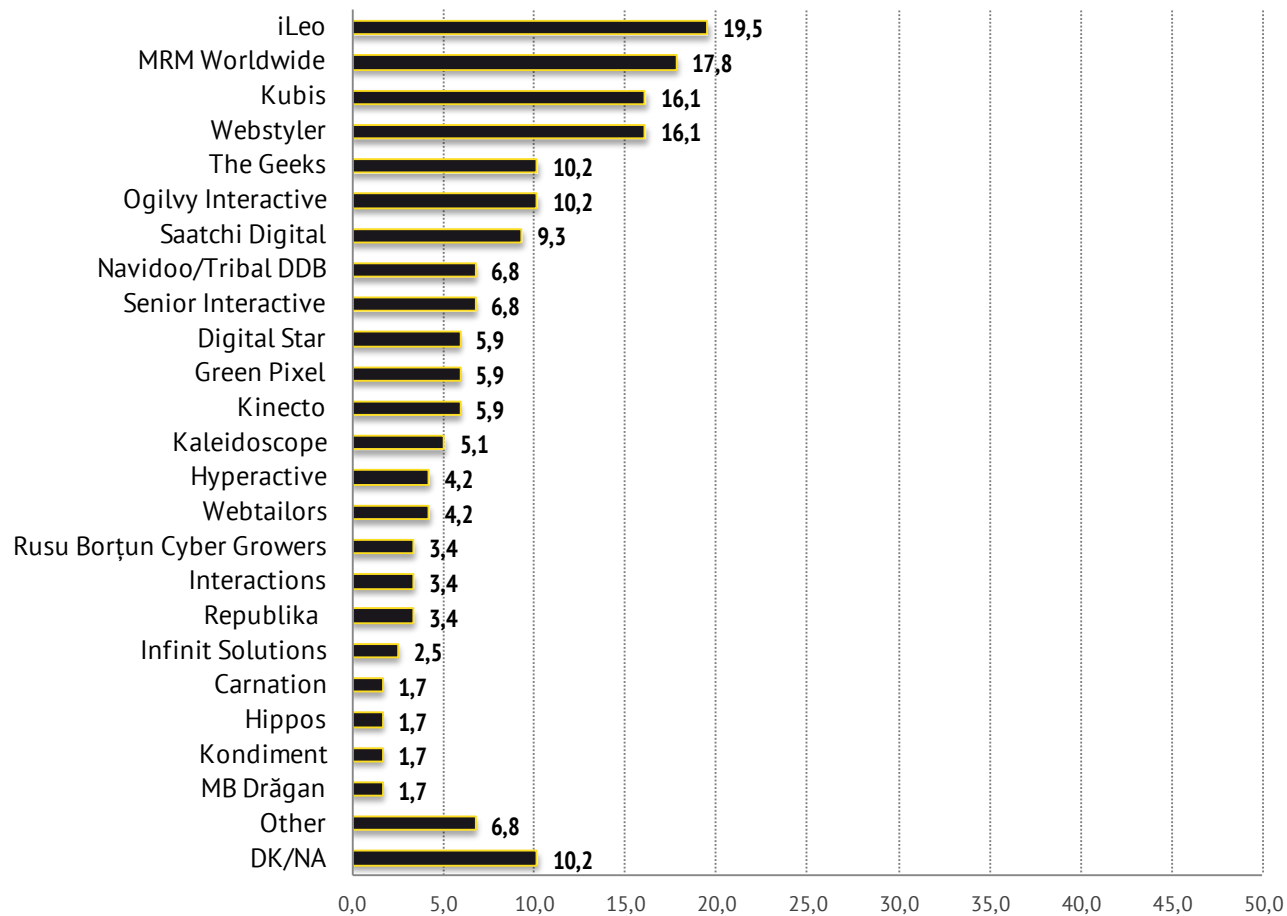


*N=118, closed multiple answers

AG5. BEST CS/PROJECT MANAGEMENT DIGITAL AGENCY



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

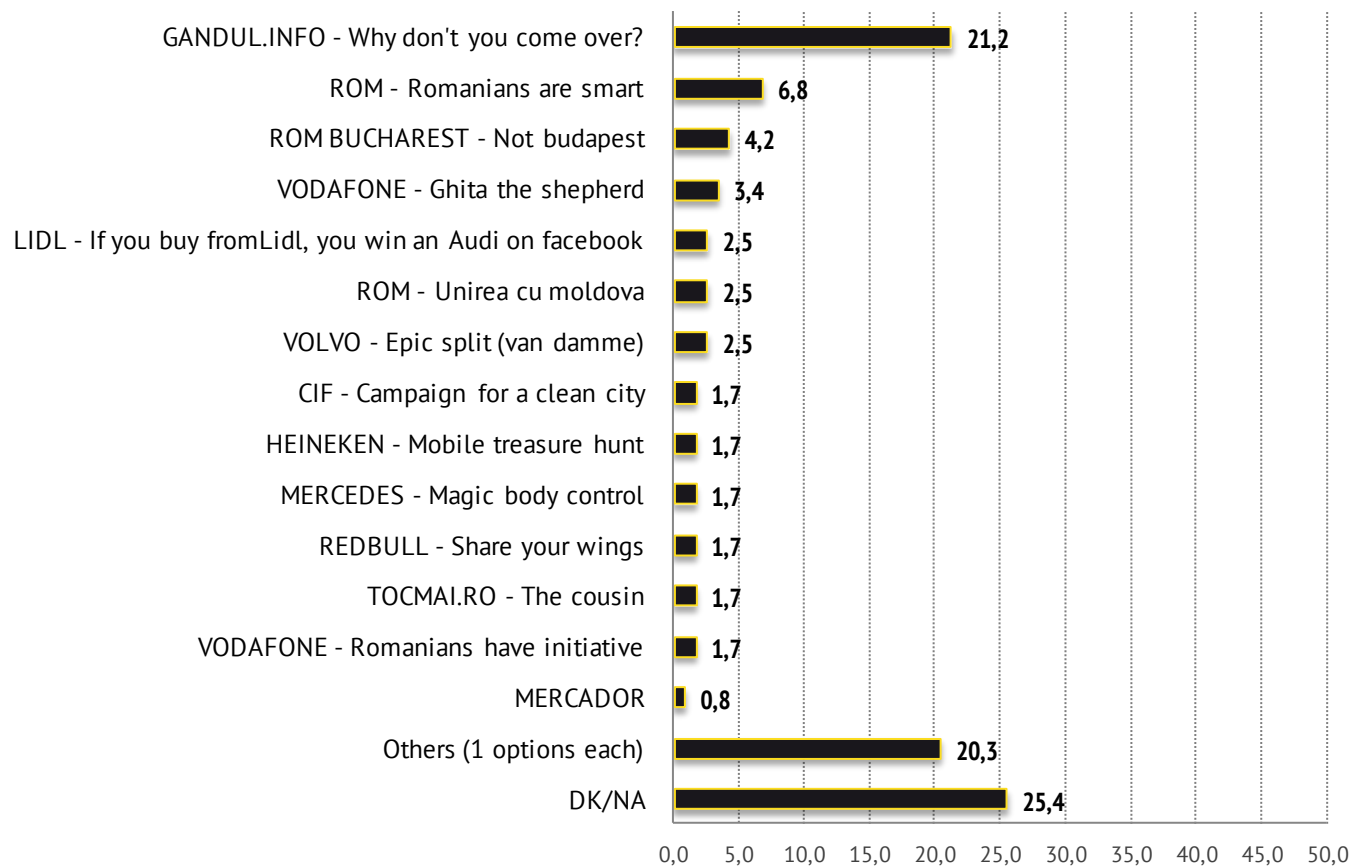


*N=118, closed multiple answers

AG6. MOST LIKED 2013 DIGITAL CAMPAIGN



Which was your favorite digital campaign (local or international) aired in Romania in 2013?



*N=118, open single answer

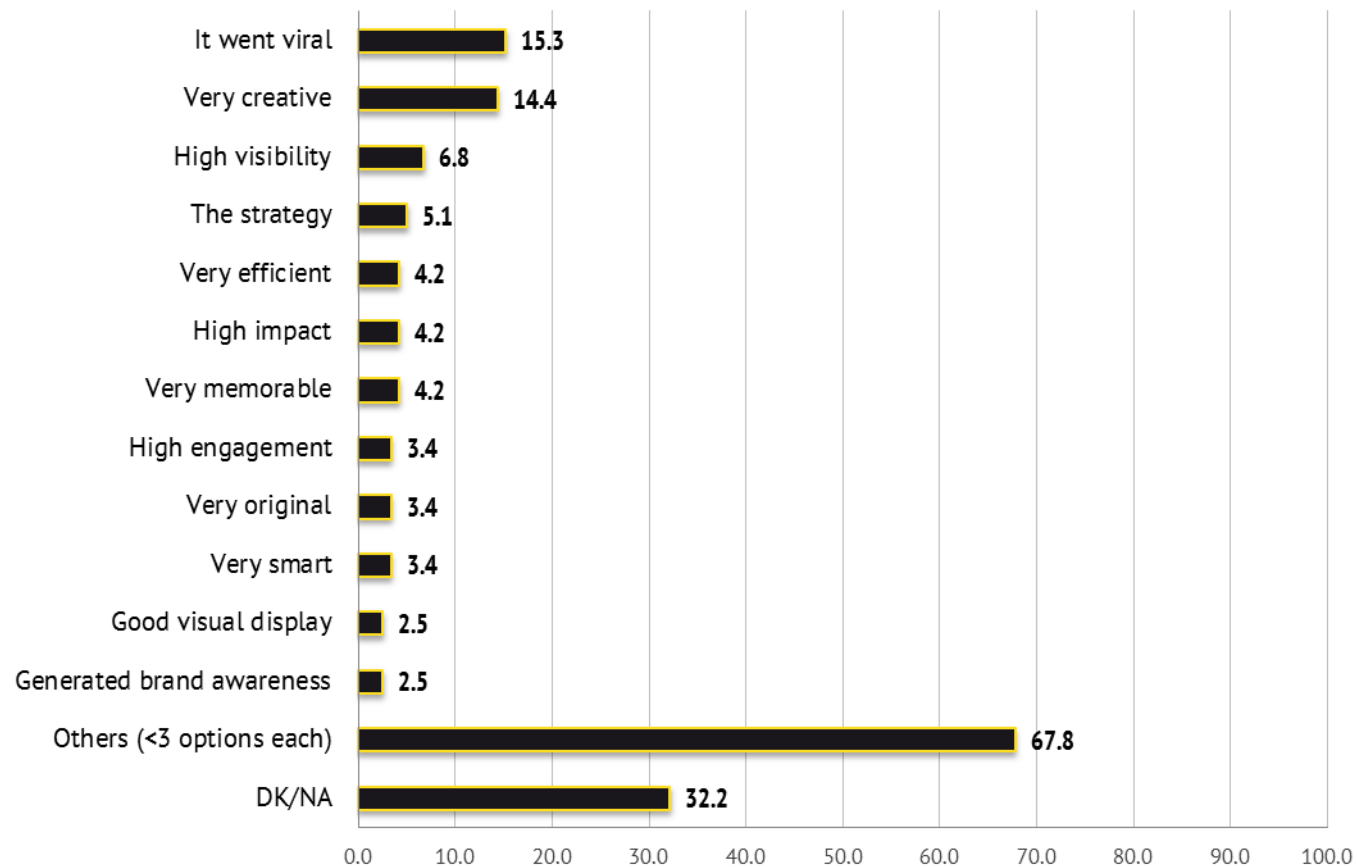
Other campaigns mentioned:

- PETROM - Andrei's country
- PEPSI VINTAGE
- YOPLAI - 5 minutes of pleasure
- OPEL - Supporting Fodor family online campaign
- COSMOTE - Double benefits
- PIRAEUS - Microsite "wishes"
- REDD'S
- PEGAS - Nation's internet
- ING BANK
- ABSOLUT VODKA' campaign
- DONCAFE - Horoscope over a cup of coffee
- ORIFLAME - Brand communication
- BERGENBIER - Celebrating man's day
- RAIFFEISEN - Life without cash
- COCA COLA'S every single campaign
- RADIO GUERILLA - Atlas of cads 2.0
- PEPSI - Refresh
- KINDER SURPRISE
- PEPSI - Summer fun
- BAUMAX Campaign
- BERGENBIER - Days of friendship
- WORLD VISION Donator de viitor
- NOKIA - Lumia launch campaign
- COSMOTE - Butterfly
- LIDL - Greek week, Mexican week
- VODAFONE - The manager

AG7. REASON WHY (PREVIOUS QUESTION)



Please explain the reasons that led you to chose this campaign



*N=118, open multiple answers

Other reasons mentioned:

- Campaign's transparency
- Very authentic
- Profit from moments of opportunity
- Clear and good illustration of the benefit
- Very relevant
- Top of mind
- International size
- Digital insight
- Good social media integration
- Integrated campaign best use of digital
- Online-offline integration
- They knew how to expand their target
- Effective campaign
- Unusual campaign
- Best integration in all media
- Good differentiation
- It involves a political subject
- Spontaneous
- Campaign produced in Romania
- The messaged reached women, who gave presents to man
- Great campaign results
- Best use of humor
- Direct interaction
- Out of the box
- Excellence in craft
- Digital innovation linked with offline
- Great message
- The concept itself
- Great timing
- Brand evolution
- Award-winning
- Good reach
- Mihai Gongu's "touch"
- Powerful brand
- Challenged a hot topic
- Emotional connection
- Created user interaction
- Created/generated user interaction
- Novelty
- Nonintrusive
- Rapid development

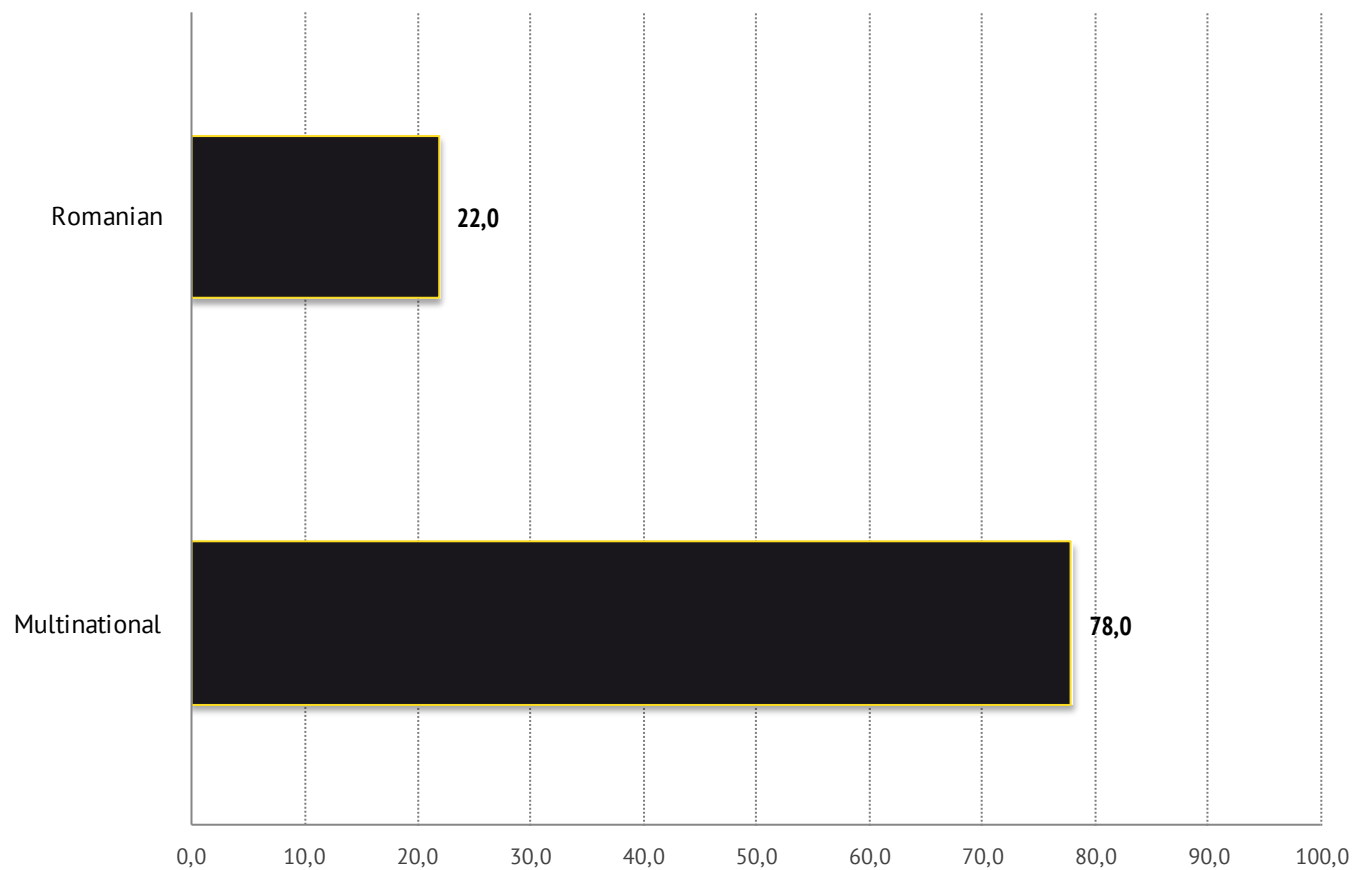
- In line with the rest of communication strategy
- Insightful
- Campaign's success
- Message communicated with clarity
- Easy to understand
- It contained aspects of everyday life
- Interesting follow-up
- Fast
- Good concept

- Bold campaign
- It was linked to the reality we are faced with, and proposed solution to it
- Went beyond advertising to make a real connection with people
- Well-chosen target
- Simplicity
- Patriotism
- Local relevant

ID1.PROVENIENCE OF SPENDING COMPANY



Romanian/multinational company

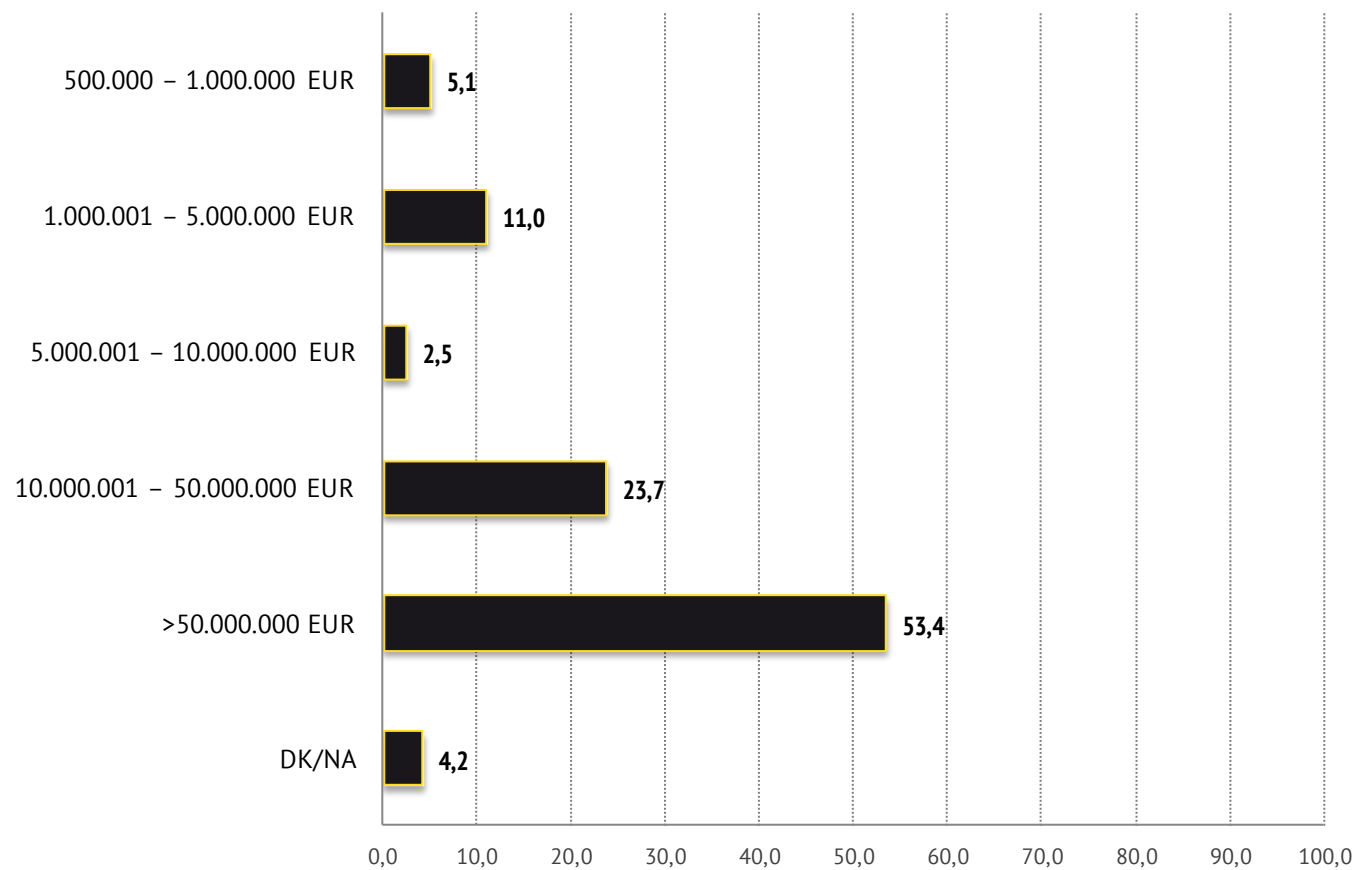


*N=118, closed single answer

ID2.TURNOVER



Company's financial turnover

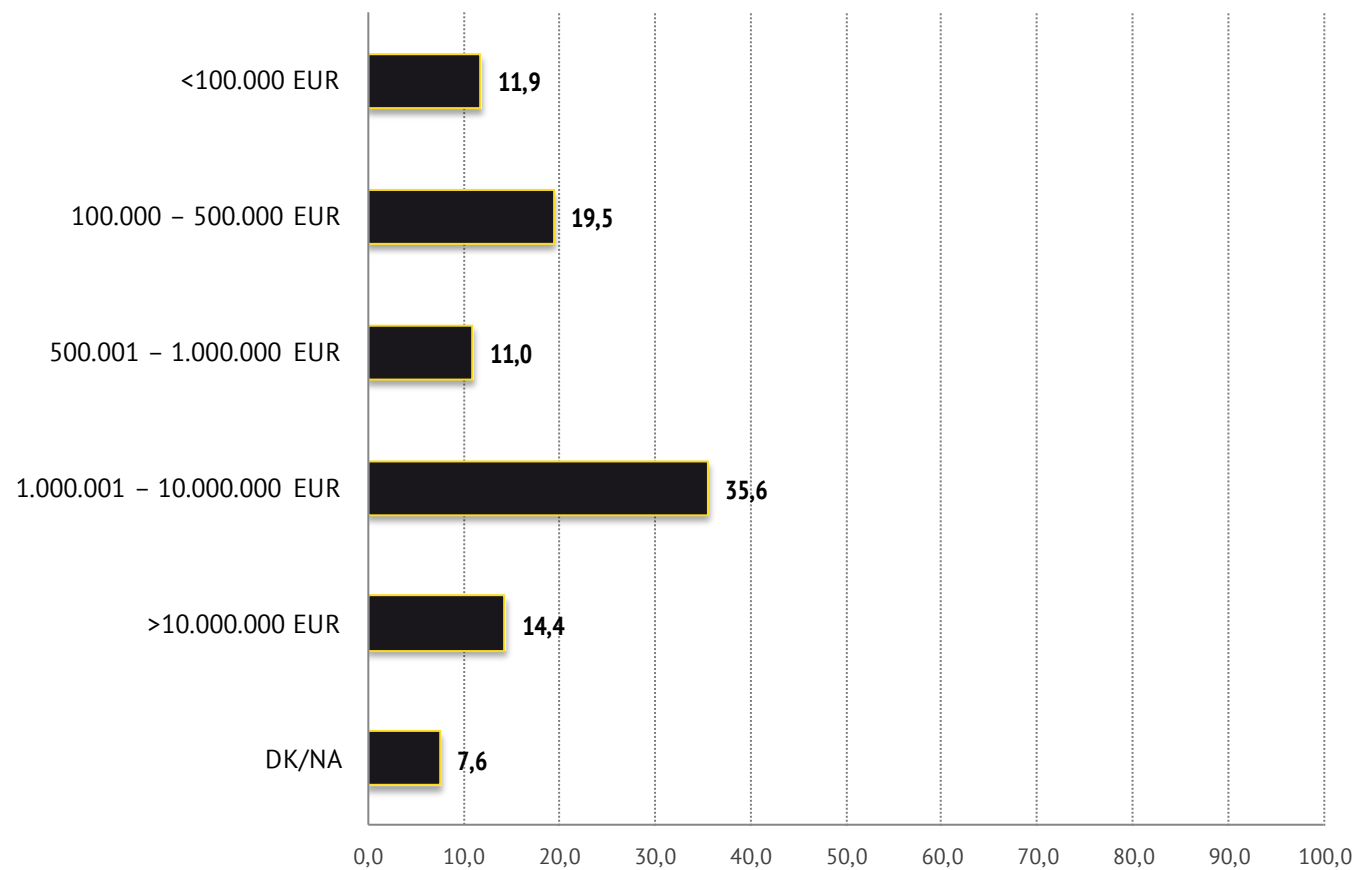


*N=118, closed single answer

ID3. TOTAL ADVERTISING SPENDING



Budget for the entire communication activities

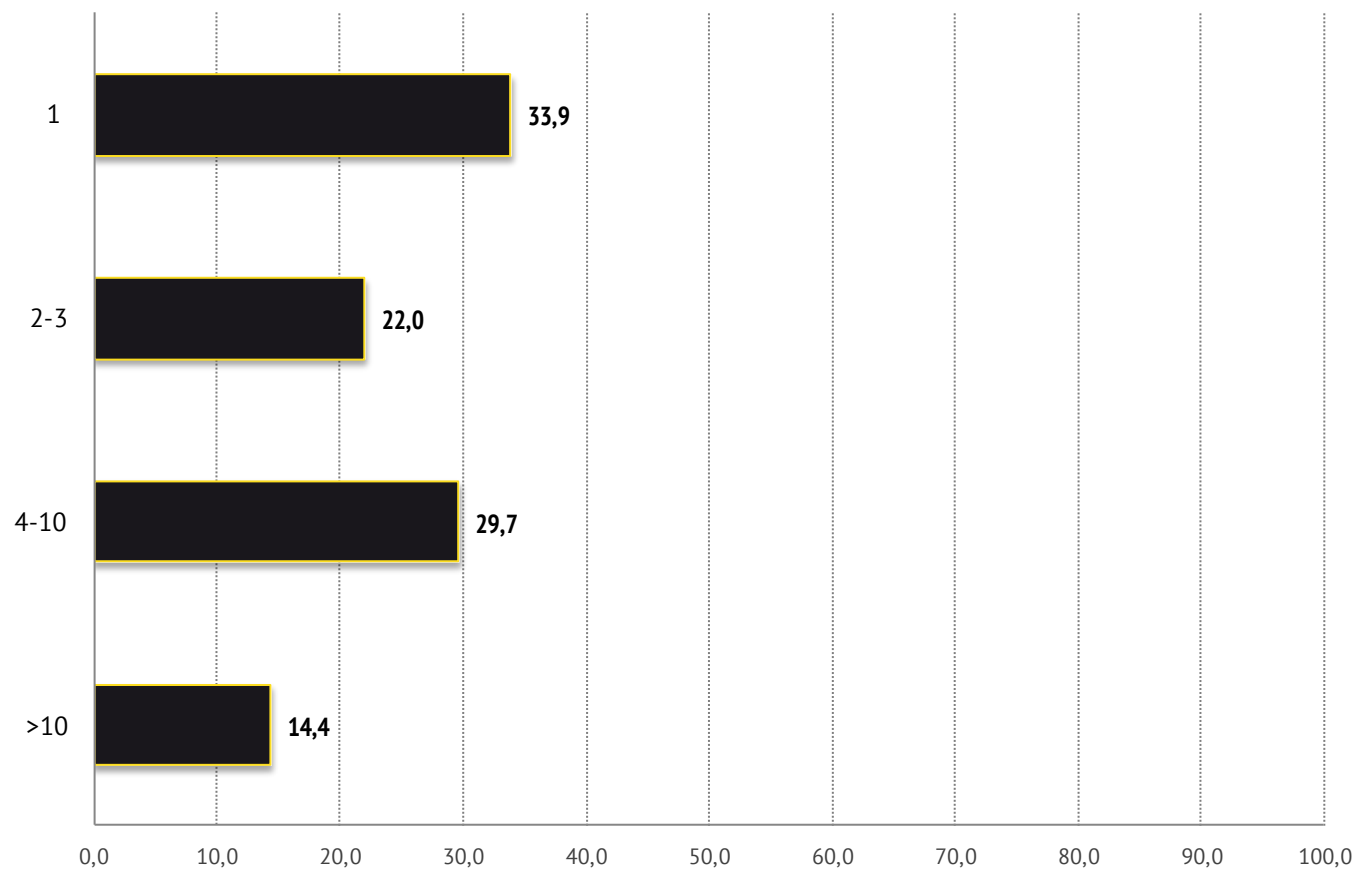


*N=118, closed single answer

ID4.NUMBER OF ACTIVE BRANDS IN ROMANIA



Estimated active brands in Romania

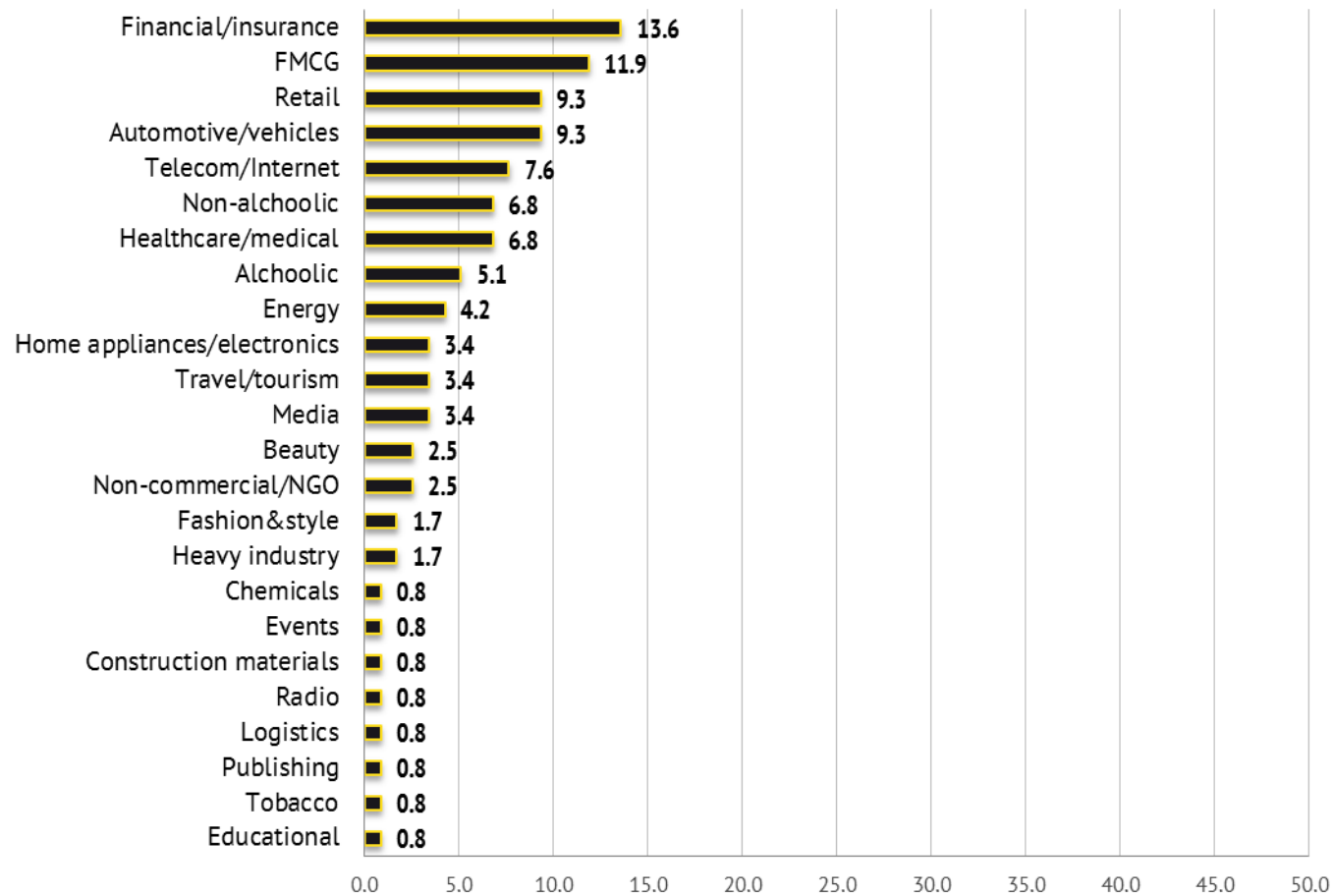


*N=118, closed single answer

ID5.DOMAIN OF ACTIVITY



Company's area of activity



*N=118, closed single answer



Thank you!

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