

Ad Trac 2005

Please tell us the name of the company you work for: _____

Fax your completed survey to Longwoods International at **416-861-9530**

Definitions

Advertising: Refers to traditional television, radio and print formats.

Marketing/Communications: Refers to broader and integrated messaging including traditional advertising plus other options such as Internet, interactive, direct response, promotions, etc.

Advertising/Communications Agency: An organization specializing in traditional advertising/marketing and branding.

Media Services: An organization specializing in planning and buying media.

Communication Specialist: An organization specializing in non-traditional marketing/communications services.

Disciplines/Multi-Channel: Includes advertising, media, direct response, interactive, public relations, etc. etc.

I) GENERAL ISSUES FACING THE MARKETING/COMMUNICATIONS BUSINESS

- 1) Please indicate whether you agree or disagree with each of the following statements **about the marketing/communications business**. Use the 10-point scale shown below, where "10" means you **agree completely** with the statement and "1" means **you do not agree at all**. (Please select **one** number for **each** statement.)

	<u>Agree</u>										<u>Do Not</u>
	<u>Completely</u>										<u>Agree At All</u>
Canadian-owned agencies best serve the interests of clients in Canada	10	9	8	7	6	5	4	3	2	1	
Quebec is already a separate country as far as the world of marketing and advertising is concerned	10	9	8	7	6	5	4	3	2	1	
Marketers in Canada will increasingly adapt Creative for French Canada, rather than custom-make Creative for the market	10	9	8	7	6	5	4	3	2	1	
From a marketing point-of-view there are more differences within Canada than there are between Canada and the U.S.	10	9	8	7	6	5	4	3	2	1	
Decision-makers in marketing and advertising generally take adequate account of the differences between English Canadians and Americans	10	9	8	7	6	5	4	3	2	1	
Regardless of their actual product preferences, English Canadians are very different to Americans in their actual responses to advertising	10	9	8	7	6	5	4	3	2	1	
Increasingly, in multi-national companies, the major marketing and advertising decisions are being made outside of Canada	10	9	8	7	6	5	4	3	2	1	
The concept of branding will remain central to consumer marketing	10	9	8	7	6	5	4	3	2	1	
As a company, we are limited in our choice of agencies by global alignment	10	9	8	7	6	5	4	3	2	1	
Clients are becoming less sensitive to issues of "account conflict"	10	9	8	7	6	5	4	3	2	1	
The "traditional" relationship between agencies and their clients is gradually becoming more of a project-based relationship	10	9	8	7	6	5	4	3	2	1	
Overall, smaller agencies tend to provide a faster and better solutions to advertising problems	10	9	8	7	6	5	4	3	2	1	

	<u>Agree Completely</u>					<u>Do Not Agree At All</u>				
	10	9	8	7	6	5	4	3	2	1
Marketers need to become more adept at targeting ethnic/multicultural groups with their advertising campaigns	10	9	8	7	6	5	4	3	2	1
Fees for service billing makes more sense for communication functions, as opposed to the old commission remuneration system	10	9	8	7	6	5	4	3	2	1
As a company, we will be considering the inclusion of performance-related factors in agency remuneration	10	9	8	7	6	5	4	3	2	1
As a result of the Gomery Inquiry, agencies need to give more attention to what is "ethical" in their business	10	9	8	7	6	5	4	3	2	1
The agency practices uncovered by the Gomery Inquiry are an exception rather than the rule in the industry	10	9	8	7	6	5	4	3	2	1
Agencies need to be more transparent in their billing practices	10	9	8	7	6	5	4	3	2	1
Privacy legislation is challenging how marketers interact with existing customers/prospects	10	9	8	7	6	5	4	3	2	1
Agencies provide excellent measurements of the effectiveness of advertising	10	9	8	7	6	5	4	3	2	1
Clients are increasingly relying on their own resources in generating information about the consumer	10	9	8	7	6	5	4	3	2	1
Specialized research companies offer better insights into consumer behaviour than do agencies	10	9	8	7	6	5	4	3	2	1
Independent marketing consultants are gaining influence in marketing/advertising decision making, at the expense of their agency equivalents	10	9	8	7	6	5	4	3	2	1
Generally speaking, we feel we are getting an excellent advertising product from our agency/agencies.	10	9	8	7	6	5	4	3	2	1

How does the business model for advertising/communications have to change to best meet your needs?

II) YOUR IMPRESSIONS OF YOUR CURRENT COMMUNICATION FIRMS

In this section we would like to get you impressions of the advertising/marketing/communications companies that **currently work for your organization**.

This information will allow each participating agency to gauge the strengths and weaknesses in its own current performance and will ultimately result in better service for its clients.

As in all the previous studies, the results will be released only to the specific agency concerned and only in form that will not identify the responses of specific individuals or companies.

Please identify all of the CANADIAN COMMUNICATIONS FIRMS that your company currently uses.

(If the company has more than one office in Canada, please specify the city in which the company you use is located.)

Advertising/Communication Agencies

- Ambrose Carr Linton Carroll
- Anderson
- Arnold Worldwide
- BBDO (specify location: _____)
- Beauchesne Ostiguy & Simard
- Bensimon Byrne
- Big House
- Brown Communications
- Cossette (specify city: _____)
- DDB (specify city: _____)
- Diesel
- Downtown Partners
- Enterprise Creative Selling
- GWP Brand Engineering
- Gee Jeffery & Partners
- Grey Worldwide
- Grip Limited

- FCB Canada

- Highwood Communications

- J. Walter Thompson
- John St
- Leo Burnett
- Lowe Roche
- MacLaren McCann
- Marketel
- Ogilvy & Mather Canada
- OgilvyOne
- Publicis
- Rethink
- Saatchi & Saatchi
- Sharpe Blackmore Euro RSCG 4D
- Taxi (specify city: _____)
- TBWA
- TMP Worldwide
- Venture Communications
- Vickers & Benson
- Wasserman & Partners
- Watermark Advertising Design
- Young & Rubicam
- Zig
- Other (specify: _____)
- Other (specify: _____)
- Other (specify: _____)

Media Companies

- Carat Canada
- Cossette Media
- FCB Toronto
- Genesis Media
- HYPH
- Initiative Media
- M2 Universal
- MPG Maxxmedia (Arnold)
- MBS/Media Buying Service/
Publicité MBS
- MediaVest (BB DMB&B)
- Mind Share (O&M; JWT)
- OMD (BBDO; DDB; TBWA)
- PHD
- Starcom (Leo Burnett)
- Touché
- TN Media

- The Media Company/

Le Groupe TMC

- The Media Edge (Y&R)
- ZenithOptimedia (Publicis)
- Other (specify: _____)
- Other (specify: _____)
- Other (specify: _____)

Communication Specialists

- Blitz (Cossette)
- Draft Worldwide
- Edelman
- Fjord (Cossette)
- Fleishman Hillard
- Fuel
- Fusion (Cossette)
- Grapheme (Cossette)
- Henderson Bas
- Hill & Knowlton
- Optimum (Cossette)
- Proximity
- Rapp Collins Worldwide
- Taylor Tarpay Direct
- Weber Shandwick
- Wunderman
- Other (specify: _____)
- Other (specify: _____)
- Other (specify: _____)

3) Now we would like your opinion about the performance of your **current communication firms** in various areas. Please write in up to FOUR firms from the previous page, starting with the ones that handle most of your company's business.

Please indicate how much you agree or disagree that the statements below describe **each** company you work with, using the 10-point scale shown below. A "10" means that you **agree completely** that the statement describes that company and a "1" means that you **do not agree at all**. (Write in your answers in the spaces below each company's name. Write in a "0" if the statement does not apply to the company you are rating.)

Agree Completely										Do Not Agree At All	Not Applicable
10	9	8	7	6	5	4	3	2	1	0	

	Company #1	Company #2	Company #3	Company #4
Write In Companies You Currently Work With Here: ----->	_____	_____	_____	_____

Overall Performance

Overall, this company has high calibre people	_____	_____	_____	_____
Overall, the services offered by the company represent excellent value for money	_____	_____	_____	_____
Strategic Planning works very well with Creative team	_____	_____	_____	_____
This company is consistently able to deal with tough problems	_____	_____	_____	_____
This company is very good at keeping up with the demands of our business	_____	_____	_____	_____
This company has always tailored its services to meet our requirements	_____	_____	_____	_____
This company responds to our needs in a timely manner	_____	_____	_____	_____
This company always provides the leadership we want	_____	_____	_____	_____
This is a very well-run company	_____	_____	_____	_____
This company consistently shows initiative	_____	_____	_____	_____
This company has staff we enjoy working with	_____	_____	_____	_____
This company delivers what we need in brand strategy	_____	_____	_____	_____
This company has a very solid Account Management team	_____	_____	_____	_____
This company has a strong Account Planning/ Strategic Planning group	_____	_____	_____	_____
This company's owners/senior management know as much as they need to know about our business	_____	_____	_____	_____
The account group is capable of disciplined thinking	_____	_____	_____	_____

Agree Completely										Do Not Agree At All	Not Applicable
10	9	8	7	6	5	4	3	2	1	0	

	Company #1	Company #2	Company #3	Company #4
Write In Companies You Currently Work With Here: ----->	_____	_____	_____	_____

Overall Performance Cont'd

The account group is able to find strategic solutions to marketing problems	_____	_____	_____	_____
This company contributes to a real understanding of the Canadian consumer	_____	_____	_____	_____
The company has excellent French service capabilities	_____	_____	_____	_____
There is enough experience accessible within the agency to solve any short-term problem	_____	_____	_____	_____
I am very satisfied with this company's performance overall	_____	_____	_____	_____
I would highly recommend this company to others	_____	_____	_____	_____

Creative

This company consistently provides effective advertising	_____	_____	_____	_____
This company consistently provides imaginative, breakthrough advertising	_____	_____	_____	_____
This company has very strong Creative talent	_____	_____	_____	_____
This company provides creative solutions that are accountable to driving sales	_____	_____	_____	_____

Integrated Communications

This company always examines a full range of communications alternatives	_____	_____	_____	_____
This company is objective in its recommendations and has no bias towards particular communications' options	_____	_____	_____	_____
This company's modus operandi is well suited to developing integrated communications campaigns	_____	_____	_____	_____
This company knows how to work with other disciplines in making a communications plan work	_____	_____	_____	_____
This company delivers an added value to its clients because it is part of an international network of agencies	_____	_____	_____	_____

Agree Completely										Do Not Agree At All	Not Applicable
10	9	8	7	6	5	4	3	2	1	0	

	Company #1	Company #2	Company #3	Company #4
Write In Companies You Currently Work With Here: ----->	_____	_____	_____	_____

Media Services

Provides media thinking that is innovative	_____	_____	_____	_____
Provides media thinking that is strategically sound	_____	_____	_____	_____
This company develops excellent and imaginative media plans	_____	_____	_____	_____
This company buys media very efficiently	_____	_____	_____	_____
The overall servicing of the media function meets our needs	_____	_____	_____	_____
The company is very thorough in its campaign evaluation	_____	_____	_____	_____
Account and media groups work very well together as a team	_____	_____	_____	_____
Media and creative groups work well together as a team	_____	_____	_____	_____
This company offers the complete range of media services that we need	_____	_____	_____	_____
This company helps integrate our overall communications plan	_____	_____	_____	_____
This company accepts a leadership role in exploring alternative media options	_____	_____	_____	_____
The company has people well-trained in utilizing alternative media options	_____	_____	_____	_____
This company is progressive in their understanding of interactive media options	_____	_____	_____	_____
This company is highly accountable to their planning & buying decisions	_____	_____	_____	_____

What are the **positive** characteristics of your relationship with your lead communications partner/agency?

What are the **negative** characteristics of your relationship with your lead communications partner/agency?

4) This question also concerns the companies that you **currently work with**.

Listed below are some ways of describing agencies, divided into groups of four statements each. Please select the **one statement in each group that best describes each company**. Indicate your choice by putting an "X" in the appropriate box below that company's name.

	Company <u>#1</u>	Company <u>#2</u>	Company <u>#3</u>	Company <u>#4</u>
Write In Agencies You Currently Work With Here: ----->				
Very disciplined thinkers	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Fairly disciplined	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Not particularly disciplined	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Very undisciplined	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Has a great deal of "flair"	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Has some "flair"	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Tends to be dull	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Is very dull	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Is very responsive	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Is usually responsive	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Tends to be arrogant	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Is very arrogant	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Trend-setting; visionary; innovative	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Flexible in adjusting to today's needs	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Solid but a little too traditional	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Cumbersome; ponderous; old fashioned	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Is very distinctive	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Is fairly distinctive	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Little difference from the "generic"	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
No difference from the "generic"	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

All the services we could possibly want	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Services consistent with our needs	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Services barely adequate to cover our needs	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Insufficient services for our needs	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Excellent understanding of Integrated Communications	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Good understanding of Integrated Communications	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Adequate understanding of Integrated Communications	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Poor understanding of Integrated Communications	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

II) YOUR IMPRESSIONS OF COMPANIES YOU DO NOT CURRENTLY WORK WITH

5) Listed below are some Canadian Communication Firms. We would like to know how **familiar** you are with all of these companies. Using the scale as shown below, please indicate whether you it is one that you “currently use”, “know a lot about”, “know a little about”, or “know nothing about”. (Select one box for each company)

	<u>Currently Use</u>	<u>Know A Lot About</u>	<u>Know A Little About</u>	<u>Know Nothing About</u>
<u>Advertising/Communication Agencies</u>				
Ambrose Carr Linton Carroll	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Anderson	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Arnold Worldwide	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
BBDO Canada	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Beauchesne Ostiguy & Simard	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Bensimon Byrne	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Big House	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Brown Communications	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Cossette Communications	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
DDB Canada	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Diesel	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Downtown Partners	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Enterprise Creative Selling	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
GWP Brand Engineering	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Geef Jeffery & Partners	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Grey Worldwide	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Grip Limited	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
FCB Canada	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Highwood Communications	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
J. Walter Thompson	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
John St	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Leo Burnett	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Lowe Roche	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
MacLaren McCann	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Marketel	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Ogilvy & Mather Canada	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Publicis	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Rethink	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Saatchi & Saatchi	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Sharpe Blackmore Euro RSCG 4D	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Taxi	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
TBWA	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
TMP Worldwide	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Venture Communications	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Wasserman & Partners	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Watermark Advertising Design	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Young & Rubicam	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Zig	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

	<u>Currently Use</u>	<u>Know A Lot About</u>	<u>Know A Little About</u>	<u>Know Nothing About</u>
<u>Media Companies</u>				
Carat Canada.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Cossette Media	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
FCB Toronto.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Genesis Media Inc	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
HYPH	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Initiative Media	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
M2 Universal	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
MPG Maxxmedia (Arnold).....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
MBS/Media Buying Services/Publicité MBS.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
MediaVest (BB DMB&B)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Mind Share (O&M; JWT).....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
OMD (BBDO; DDB; TBWA)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
PHD/Touché.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Starcom (Leo Burnett).....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
TN Media	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
The Media Company/Le Groupe TMC	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
The Media Edge (Y&R)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
ZenithOptimedia (Publicis)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

	<u>Currently Use</u>	<u>Know A Lot About</u>	<u>Know A Little About</u>	<u>Know Nothing About</u>
<u>Communicaiton Specialists</u>				
Blitz	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Draft Worldwide.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Edelman	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Fjord	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Fleishman Hillard	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Fuel	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Fusion	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Grapheme	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Henderson Bas	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Hill & Knowlton	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Optimum.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Proximity	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Rapp Collins Worldwide	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Taylor Tarpay Direct.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Weber Shandwick	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Wunderman.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

6) In this question, we would like to get your impressions of the companies that you said you “**know a lot about**” in Q.5 but do not currently work with. Please write in the FIVE companies you know the most about below.

Agree Completely										Do Not Agree At All
10	9	8	7	6	5	4	3	2	1	

	Company #1	Company #2	Company #3	Company #4	Company #5
Write In Companies You Know a Lot About Here: ----->	_____	_____	_____	_____	_____

Overall, this company has high calibre people	_____	_____	_____	_____	_____
This company would be able to deal with tough problems	_____	_____	_____	_____	_____
I'd probably be very pleased with this company's performance overall	_____	_____	_____	_____	_____
This company would likely provide the leadership we want	_____	_____	_____	_____	_____
This appears to be very well-run company	_____	_____	_____	_____	_____
This company is known for disciplined account management	_____	_____	_____	_____	_____
This company is known for its ability to think strategically	_____	_____	_____	_____	_____
This company consistently produces effective advertising	_____	_____	_____	_____	_____
This company consistently produces imaginative, breakthrough advertising	_____	_____	_____	_____	_____
This agency seems to have an excellent media group	_____	_____	_____	_____	_____
This company seems to have a very strong creative group	_____	_____	_____	_____	_____
This company has the range of services we need	_____	_____	_____	_____	_____
This company seems to understand integrated marketing communications	_____	_____	_____	_____	_____
This company can handle integrated multi-channel marketing	_____	_____	_____	_____	_____

7) This question also concerns the same companies that you “**know a lot about**”, but do not currently work with.

Listed below are some ways of describing companies, divided into groups of four statements each. Please select the **one statement** in each group that best describes each company. (Indicate your choice by putting an “X” in the appropriate box below that company’s name.)

Write In Companies You Know a Lot About Here: ----->	Company #1	Company #2	Company #3	Company #4	Company #5
Very disciplined thinkers	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Fairly disciplined	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Not particularly disciplined	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Very undisciplined	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Has a great deal of “flair”	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Has some “flair”	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Tends to be dull	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Is very dull	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Is very responsive	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Is usually responsive	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Tends to be arrogant	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Is very arrogant	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Trend setting; visionary; innovative	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Flexible in adjusting to today’s needs	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Solid but too traditional in attitude	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Cumbersome; ponderous; old-fashioned	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Is very distinctive	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Is fairly distinctive	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Little difference from “the generic”	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
No difference from “the generic”	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

Complete range of services	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Strong range of services	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Adequate range of services	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Traditional services only	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>

8a) Listed below are the same Canadian companies that you saw in Question 5. This time we want to know **how likely you are to consider each company for an assignment**. Excluding companies you currently work with please indicate whether you “definitely would”, “might consider”, or “would not consider” the various companies. In answering this question, please disregard the issue of possible “conflicts”.

Excluding only those with which you *currently* work, “X” one box for each of the 28 agencies listed.

	<u>Definitely Would Consider</u>	<u>Might Consider</u>	<u>Would Not Consider</u>
<u>Advertising/Communication Agencies</u>			
Ambrose Carr Linton Carroll	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Anderson	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Arnold Worldwide	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
BBDO Canada	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Beauchesne Ostiguy & Simard	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Bensimon Byrne	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Big House	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Brown Communications	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Cossette Communications	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
DDB Canada	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Diesel	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Downtown Partners	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Enterprise Creative Selling	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
GWP Brand Engineering	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Gee Jeffery & Partners	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Grey Worldwide	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Grip Limited	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
FCB Canada	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Highwood Communications	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
J. Walter Thompson	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
John St	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Leo Burnett	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Lowe Roche	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
MacLaren McCann	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Marketel	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Ogilvy & Mather Canada	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Publicis	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Rethink	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Saatchi & Saatchi	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Sharpe Blackmore Euro RSCG	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Taxi	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
TBWA	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
TMP Worldwide	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Venture Communications	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Wasserman & Partners	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Watermark Advertising Design	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Young & Rubicam	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Zig	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>

	<u>Would Consider</u>	<u>Might Consider</u>	<u>Would Not Consider</u>
<u>Media Companies</u>			
Carat Canada.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Cossette Media	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
FCB Toronto.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Genesis Media Inc	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
HYPH	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Initiative Media	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
M2 Universal	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
MPG Maxxmedia (Arnold).....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
MBS/Media Buying Services/Publicité MBS.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
MediaVest (BB DMB&B)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Mind Share (O&M; JWT).....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
OMD (BBDO; DDB; TBWA)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
PHD/Touché.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Starcom (Leo Burnett).....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
TN Media	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
The Media Company/Le Group TMC.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
The Media Edge (Y&R)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
ZenithOptimedia (Publicis).....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>

Communication Specialists

Blitz	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Draft Worldwide.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Edelman	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Fjord.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Fleishman Hillard	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Fuel	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Fusion	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Grapheme	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Henderson Bas	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Hill & Knowlton	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Optimum.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Proximity	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Rapp Collins Worldwide	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Taylor Tarpay Direct.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Weber Shandwick	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Wunderman.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>

8b) Please rank the following sources of information in terms of how each contributes towards informing your opinion of the quality and offering of communication services. Please give each source a number from 1 to 8 in order of importance, with 1 being the most important source of information and 8 being the least important source of information.

	<u>Traditional Agencies</u>	<u>Media Companies</u>	<u>Non-Traditional Agencies</u>
Business/Trade Media	_____	_____	_____
Business/Trade Associations	_____	_____	_____
Subjective Evaluation of Creative	_____	_____	_____
Pitch consultants	_____	_____	_____
Awards shows	_____	_____	_____
Word of mouth	_____	_____	_____
Past experience	_____	_____	_____
Global brands	_____	_____	_____

What are the most important things you look for in selecting a new agency/media/non-traditional partner beyond the services they provide?

III. TRADITIONAL AGENCIES, MEDIA SERVICES, & NON-TRADITIONAL SERVICES

9) Using the same 10-point scale, please indicate whether you agree or disagree with each of the following statements. (Select one number for each statement.)

	<u>Agree</u>					<u>Do Not</u>					
	<u>Completely</u>					<u>Agree</u>					<u>At</u>
<u>All</u>											
<u>Advertising/Communication Agencies</u>											
Overall, we are satisfied that we are spending as much as we need to spend in major media advertising	10	9	8	7	6	5	4	3	2	1	
Traditional advertising is still the most important means of developing the concept of branding	10	9	8	7	6	5	4	3	2	1	
The key value an advertising/communication agency contributes to a communications plan is in developing its core idea	10	9	8	7	6	5	4	3	2	1	
Overall, advertising is now more important in the marketing mix than it used to be	10	9	8	7	6	5	4	3	2	1	
Overall, the larger/traditional agencies are having difficulty adapting to today's more varied client service requirements	10	9	8	7	6	5	4	3	2	1	
Increasingly, multi-brand/multi-service advertisers will look to consolidate their assignments and reduce the number of agencies they deal with	10	9	8	7	6	5	4	3	2	1	
Advertising/communication agencies still put too much stock in the traditional advertising media, even when they offer a broader range of communications services	10	9	8	7	6	5	4	3	2	1	
The training of advertising people is still too narrow for an understanding of the full range of marketing alternatives	10	9	8	7	6	5	4	3	2	1	
An advertising/communication agency should develop a key role in integrating a total communications plan, including elements developed outside the agency itself	10	9	8	7	6	5	4	3	2	1	
Advertising/communication agencies are generally being more careful in spending their clients money	10	9	8	7	6	5	4	3	2	1	
As a result of the Gomery Inquiry, there has been an erosion of trust in the traditional agency/client relationship	10	9	8	7	6	5	4	3	2	1	
If "Spec Creative" is required, then we, as the client, must set up a clear and fair remuneration arrangement to cover its cost	10	9	8	7	6	5	4	3	2	1	
<u>Media Services</u>											
Canadian media research and measurement techniques are up to date by world standards	10	9	8	7	6	5	4	3	2	1	
A media operation must have continental/trans-national media connections	10	9	8	7	6	5	4	3	2	1	
The nature of media decision-making means this area will remain local and national, rather than continental	10	9	8	7	6	5	4	3	2	1	
A media operation must have a detailed knowledge of the differences between the various regions in Canada	10	9	8	7	6	5	4	3	2	1	
Audience fragmentation is undermining the viability of mass media advertising	10	9	8	7	6	5	4	3	2	1	
To work well, media must also work well with agency											

strategic planners/account management

10 9 8 7 6 5 4 3 2 1
Agree **Do Not**
Completely Agree At

All

As a company, we like to deal directly with the media whenever possible, rather than through agencies

10 9 8 7 6 5 4 3 2 1

Media selection and placement are now as important in overall communications as the advertising message itself

10 9 8 7 6 5 4 3 2 1

The increasing complexity of the media world is putting more emphasis on “breakthrough thinking” in media, and less on basic cost/efficiency comparisons

10 9 8 7 6 5 4 3 2 1

Media planning and buying operations are pretty much the same apart from their size

10 9 8 7 6 5 4 3 2 1

The compensation/remuneration formula is a key element in selecting a media operation

10 9 8 7 6 5 4 3 2 1

Procurement is playing a greater role in the decision making process, and is superceding relationship and quality issues

10 9 8 7 6 5 4 3 2 1

The ultimate impact of procurement is that it limits service and decreases value in dealing with a media provider

10 9 8 7 6 5 4 3 2 1

Clients are increasingly looking to media operations rather than agencies for multi-channel planning perspective

10 9 8 7 6 5 4 3 2 1

Clients are increasingly looking to media operations rather than agencies for holistic marketing solutions

10 9 8 7 6 5 4 3 2 1

Clients expect consumer insight to be a part of the media team

10 9 8 7 6 5 4 3 2 1

The suppliers and buyers of media must be more involved in the evaluation of the effectiveness of advertising

10 9 8 7 6 5 4 3 2 1

Media service should include the ability to complete return-on-investment analysis

10 9 8 7 6 5 4 3 2 1

Those in media should spend more time understanding their audiences, rather than just measuring them

10 9 8 7 6 5 4 3 2 1

It is important to have a measure of ROI that deals with delivery and consumption across multiple channels

10 9 8 7 6 5 4 3 2 1

A media audit is important to clients

10 9 8 7 6 5 4 3 2 1

Though the Internet works well in theory, it is particularly difficult to evaluate its real impact as an advertising medium

10 9 8 7 6 5 4 3 2 1

Media has the responsibility of keeping us up to date with new communications technologies and techniques

10 9 8 7 6 5 4 3 2 1

Added value packaging with media suppliers is now a critically important component of the media function

10 9 8 7 6 5 4 3 2 1

The media function should now include a capability in assessing, implementing and evaluating an integrated marketing programme

10 9 8 7 6 5 4 3 2 1

Media operations generally have the reputation of developing objective/media neutral recommendations, with no bias towards particular communications options

10 9 8 7 6 5 4 3 2 1

<u>All</u>	<u>Agree Completely</u>					<u>Do Not Agree At</u>				
The issue of "account conflict" is as critical in media management as it has always been in the traditional agency	10	9	8	7	6	5	4	3	2	1
The conflict issue may still be important in media strategy/planning but has little significance in the media buying function	10	9	8	7	6	5	4	3	2	1
Overall, we are getting excellent service from our media company	10	9	8	7	6	5	4	3	2	1
<u>Communication Specialist Services</u>										
Alternative media marketing is no longer an afterthought, but a integral part of the overall communications plan	10	9	8	7	6	5	4	3	2	1
Non-traditional communications are only a minor element within a total advertising programme	10	9	8	7	6	5	4	3	2	1
We aim to work with the best talent we can find, even if this means dealing with different suppliers for each communications service	10	9	8	7	6	5	4	3	2	1
Non-traditional marketing has made it easier to reach ethnic/foreign language audiences	10	9	8	7	6	5	4	3	2	1
Alternative marketers can add a lot of value to an advertising programme by being included in the creative process at the strategic planning stage	10	9	8	7	6	5	4	3	2	1
We would like to have alternative suppliers more involved with the planning and not just the execution of our communications programme	10	9	8	7	6	5	4	3	2	1
Non-traditional specialists make positive contributions to our Integrated Communication goals	10	9	8	7	6	5	4	3	2	1
Alternative marketers are better suited to targeting specific consumer segments	10	9	8	7	6	5	4	3	2	1
Non-traditional marketers are better than their traditional counterparts at working as part of a team to integrate a client's communications plan	10	9	8	7	6	5	4	3	2	1
<u>Multi-Channel Integration</u>										
As a company, we have a clear idea about how we want our communications needs integrated	10	9	8	7	6	5	4	3	2	1
As a company, our preference would be to be in charge of integrating all the communication disciplines ourselves	10	9	8	7	6	5	4	3	2	1
Communication specialists within advertising/communication agencies are just as effective as using independent specialists	10	9	8	7	6	5	4	3	2	1
Communication specialists within advertising/communication agencies are more efficient than using independent specialists	10	9	8	7	6	5	4	3	2	1
Effective multi-channel integration requires collaboration between all our suppliers	10	9	8	7	6	5	4	3	2	1
Determining how to achieve collaboration between suppliers is a difficult task at best	10	9	8	7	6	5	4	3	2	1
Clients' greatest roadblock to integration is internal	10	9	8	7	6	5	4	3	2	1

Advertising/communication agencies should have the primary role of ensuring brand integration across channels

10 9 8 7 6 5 4 3 2 1

**Agree
Completely**

**Do Not
Agree At**

All

Advertising/communication agencies are now seen more as one of our suppliers rather than as our main communications partner

10 9 8 7 6 5 4 3 2 1

A traditional advertising budget should be considered within an overall communications budget, not as an independent item

10 9 8 7 6 5 4 3 2 1

Advertising/communication agencies should provide a complete package of integrated communication tools so clients don't need to seek out specialist suppliers

10 9 8 7 6 5 4 3 2 1

Advertising/communication agencies should provide some integrated communication tools, but many specialty areas are best suited to be handled by the experts in those areas.

10 9 8 7 6 5 4 3 2 1

Clients should only be able to declare a conflict of interest Within the specific discipline they are working in

10 9 8 7 6 5 4 3 2 1

10) Are you completely satisfied with how your integration communications needs are currently being met?

Yes 1 **(Skip to Question 11)**

No 2 **(Continue)**

How are your communications needs currently being integrated? Is the current arrangement working for you, and if not, what would be ideal?

11) In this question we are interested in **the distribution of your total communications budget** between the various disciplines.

- a) In column “a”, please indicate in percentage terms which of the following you are currently spending your money on: **(Total must sum to 100)** (Please give your best estimate of your company’s percentage of spend in each of the following traditional and alternative communications disciplines, even if you do not know the exact amounts)
- b) And in column “b”, please indicate in percentage terms how you expect the distribution of your total communications budget **to change over the next 3-5 years: (Total must sum to 100)**

	<u>Column “a” Current Spend</u>	<u>Column “b” 3-5 Years</u>
<u>Traditional Communications/Media</u>		
Print	___%	___%
Radio	___%	___%
TV	___%	___%
<u>Alternative Communications/Media</u>		
Brand Identity	___%	___%
Buzz Marketing	___%	___%
Customer Relationship Management	___%	___%
Data Base Management	___%	___%
Direct Response Marketing	___%	___%
Event Management	___%	___%
Interactive Services	___%	___%
Internal Marketing	___%	___%
Package Design	___%	___%
Point of Sales/Retail Design	___%	___%
Public Relations	___%	___%
Sales Promotion	___%	___%
Sponsorship/Alliance Marketing	___%	___%
Text Messaging	___%	___%
Web/Internet Services	___%	___%
Total:	100%	100%

12) In this question, we would like you to **compare advertising agencies to other businesses offering professional services (such as lawyers, accountants, bankers, etc.)** Please use the same 10-point scale to indicate your agreement or disagreement compared to other service businesses...

	<u>Agree Completely</u>					<u>Do Not Agree At All</u>				
The services offered by the advertising business represent excellent value for money	10	9	8	7	6	5	4	3	2	1
One tends to feel more “comfortable” dealing with agency people because their service is more personal	10	9	8	7	6	5	4	3	2	1
Overall, agencies are more willing to up-date the way They operate and are organized	10	9	8	7	6	5	4	3	2	1
My agency contact person is my first port-of-call when I am looking for fresh thinking about my overall business	10	9	8	7	6	5	4	3	2	1
Agencies are just like any other business offering professional services and the way they are paid should be the same	10	9	8	7	6	5	4	3	2	1
Overall, agency people are more likely to have the broader perspective necessary to serve a clients best long-term interests	10	9	8	7	6	5	4	3	2	1
Advertising agencies are losing their special status vs. other professional services, now being just one more service-supplier	10	9	8	7	6	5	4	3	2	1

VI. BASIC INFORMATION

The information provided in the next section of the study is for the exclusive use of the individual agency concerned. It will be available only to that agency and is completely confidential.

This basic information will help us to classify the results.

13) Which **one** of the following best describes your company's principal business? ("X" one box)

- Packaged goods sold in supermarkets..... 1
- Manufactured goods not sold in supermarkets..... 2
- Public sector 3
- Service industry 4
- Retail 5
- Other (**Please Specify**) _____

14) What was the size, approximately, of your company's spending in mass media advertising last year? ("X" one box)

- Up to \$999K..... 1
- \$1M - \$4.9M 2
- \$5M or more 3

15) How many advertising agencies does your company currently use in Canada? (Write In) _____

16) In the usual run of events, how often are you in touch with your agencies, by phone or in person? ("X" one box)

- More than once a month..... 1
- Less than once a month 2

17) Is your company free to choose their own agency or do they need to work with a company global supplier of choice?

- Free to choose..... 1 (**continue**)
- Must work with global supplier..... 2 (**skip to Q.19**)

18) In the next 12-18 months, is your company planning on hiring a new...? ("X" all that apply)

- Traditional Agency 1
- Non-Traditional Agency 2
- Media Company 3
- None of the above 4

19) Is your company...?

- Canadian owned..... 1
- Foreign owned..... 2

20) To help us in our analysis, we would like to know your exposure to various communications services, as a company overall, as a client of an advertising agency, and finally as part of your personal job description. ("X" all that apply in each column below)

	<u>As a Company</u>	<u>As a Specific Agency Service</u>	<u>Part of Your Own Job Description</u>
Traditional Advertising	1 <input type="checkbox"/>	1 <input type="checkbox"/>	1 <input type="checkbox"/>
Media	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Data Base Management	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Web/Internet	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>
Customer Relationship Management	5 <input type="checkbox"/>	5 <input type="checkbox"/>	5 <input type="checkbox"/>
Public Relations	6 <input type="checkbox"/>	6 <input type="checkbox"/>	6 <input type="checkbox"/>
Event Management.....	7 <input type="checkbox"/>	7 <input type="checkbox"/>	7 <input type="checkbox"/>
Direct Response Management	8 <input type="checkbox"/>	8 <input type="checkbox"/>	8 <input type="checkbox"/>
Sales Promotion	9 <input type="checkbox"/>	9 <input type="checkbox"/>	9 <input type="checkbox"/>
Point of Sales/Retail Design	10 <input type="checkbox"/>	10 <input type="checkbox"/>	10 <input type="checkbox"/>
Package Design.....	11 <input type="checkbox"/>	11 <input type="checkbox"/>	11 <input type="checkbox"/>

21) How long have you personally been involved in marketing and advertising? ("X" one box)

- 1 - 5 years..... 1
- 6 - 10 years..... 2
- 11 - 15 years..... 3
- More than 15 years..... 4

22) Where are you located?

- Vancouver
- other British Columbia
- Alberta
- Saskatchewan
- Manitoba
- Toronto Area
- other Ontario
- Montreal
- other Quebec
- Nova Scotia
- New Brunswick
- Prince Edward Island
- Newfoundland
- other Canada (Territories)

THANK YOU FOR YOUR PARTICIPATION. PLEASE FAX THIS TO 416-861-9530.
IF YOU HAVE ANY QUESTIONS OR COMMENTS ABOUT THE STUDY,
PLEASE CALL SCOTT HANSON OR WENDY SEGAL AT LONGWOODS INTERNATIONAL (416-861-9880) OR
EMAIL US AT INFO@LONGWOODS-INTL.COM.