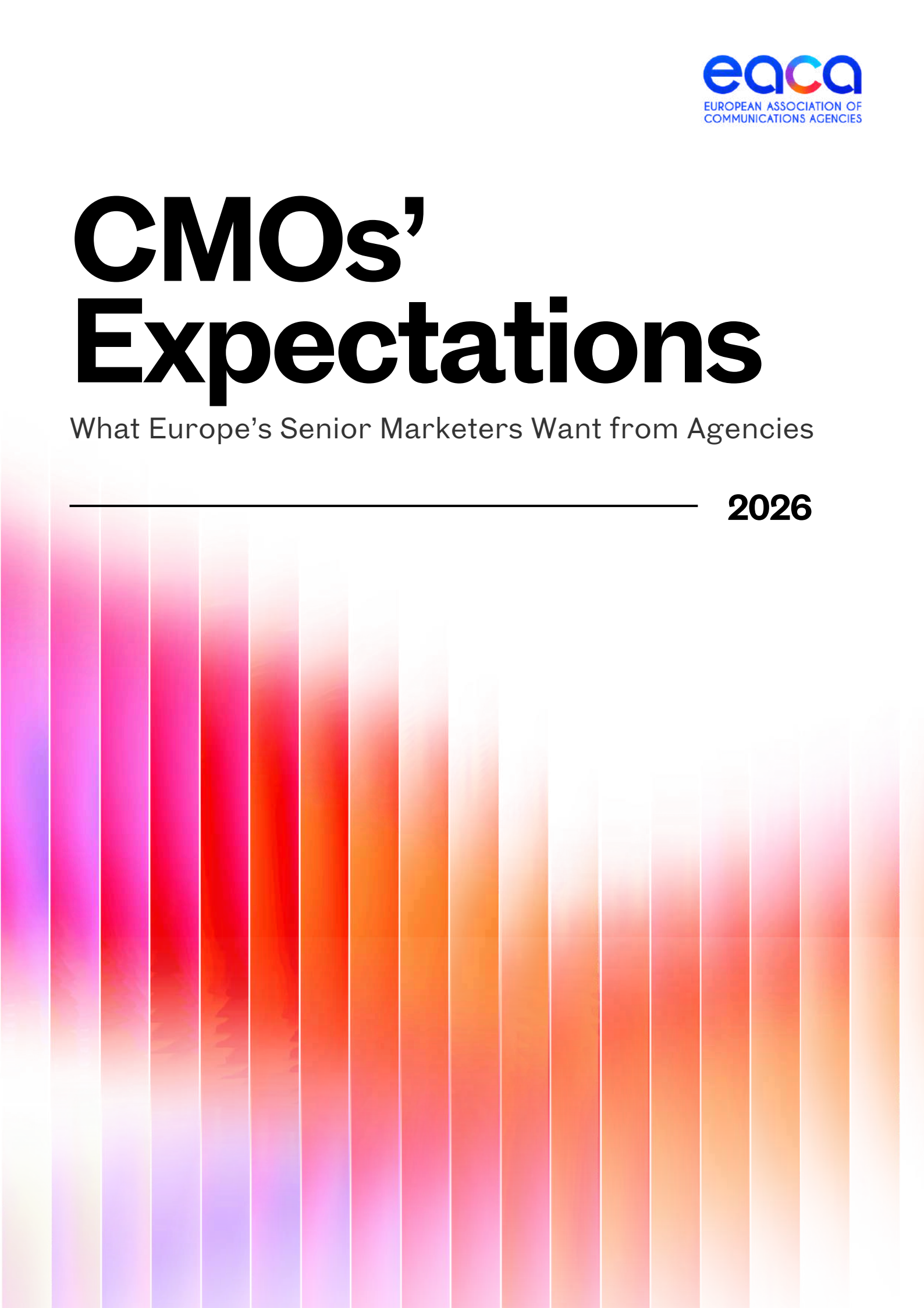
EUROPEAN ASSOCIATION OF COMMUNICATIONS AGENCIES

CMOs' Expectations

What Europe's Senior Marketers Want from Agencies

2026



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Executive Summary

About the Study

Commissioned by EACA and conducted in partnership with Kantar, the 2025 CMOs' Expectations Study provides the most comprehensive European view to date of what senior marketers expect from their agencies. EACA worked closely with Kantar to analyse responses using a combination of closed-question analytics and open-ended semantic analysis, delivering both a clear ranking of CMO priorities and a deeper understanding of the emotional and cultural expectations shaping today's client–agency relationships.

The findings are based on 141 unique responses across 22 European markets, capturing the perspectives of senior marketing leaders and top executives. 95% of respondents occupy marketing, communication or executive management roles, across brand-driven sectors including consumer goods, banking, insurance, energy, technology and services.

The findings reflect a market under pressure, where complexity, competition and transformation are fundamentally reshaping the client–agency relationship.

Context

Advertisers today operate within increasingly fragmented and demanding ecosystems. On average, CMOs work with 4.7 different agency types. Despite this complexity, 94% of respondents consider their agencies as partners rather than suppliers.

At the same time, competitive pressure is intense:

- 46% of advertisers ran a pitch in the past year
- 65% of those pitches resulted in a change of agency

The study exposes a fundamental contradiction at the heart of the client–agency relationship: while CMOs overwhelmingly want true partnerships, **frequent re-pitching and agency turnover actively undermine the trust and business immersion** required to deliver them.

What Persuades CMOs

When Choosing an Agency

Trust is the strongest persuasion factor (49% first choice), followed by deep business involvement (41%). Creative excellence remains important, ranked in the top three by 72% of respondents, but only when paired with strategic intelligence, operational reliability and brand stewardship.

While overall satisfaction is solid, a large proportion of CMOs remain merely 'satisfied' rather than enthusiastic, revealing significant headroom for agencies to move relationships from adequacy to advocacy. Performance gaps persist – agencies score well on creativity and reputation, but they underdeliver on proactivity, business immersion, and forward-looking strategic guidance.

Thus, the study outlines a clear blueprint for the agency of the future. CMOs expect teams that are simultaneously:

- **AI-native**, integrating automation, prediction and data intelligence into every layer of work
- **Strategic architects**, capable of shaping brand trajectories and contributing to business decisions
- **Operational powerhouses**, delivering consistently, reliably and with disciplined governance
- **Creatively transformative**, blending human imagination with technology-driven formats
- **Embedded collaborators**, functioning as extensions of the client team
- **Culturally intelligent**, able to decode audiences, markets and societal signals

The Ideal Agency Culture

Cultural Pillar	Description	Value for Clients
Openness & Trust	Transparent, authentic, ethical relationships	Creates confidence and long-term partnership
Proactivity & Ownership	Initiative, anticipation, accountability	Builds efficiency and reliability
Creativity & Curiosity	Constant innovation, bold ideas	Keeps the partnership inspiring and future-oriented
Collaboration & Empathy	Listening, co-creation, team alignment	Enhances mutual understanding and teamwork
Strategic Discipline	Balance between vision and precision	Ensures consistency and impact

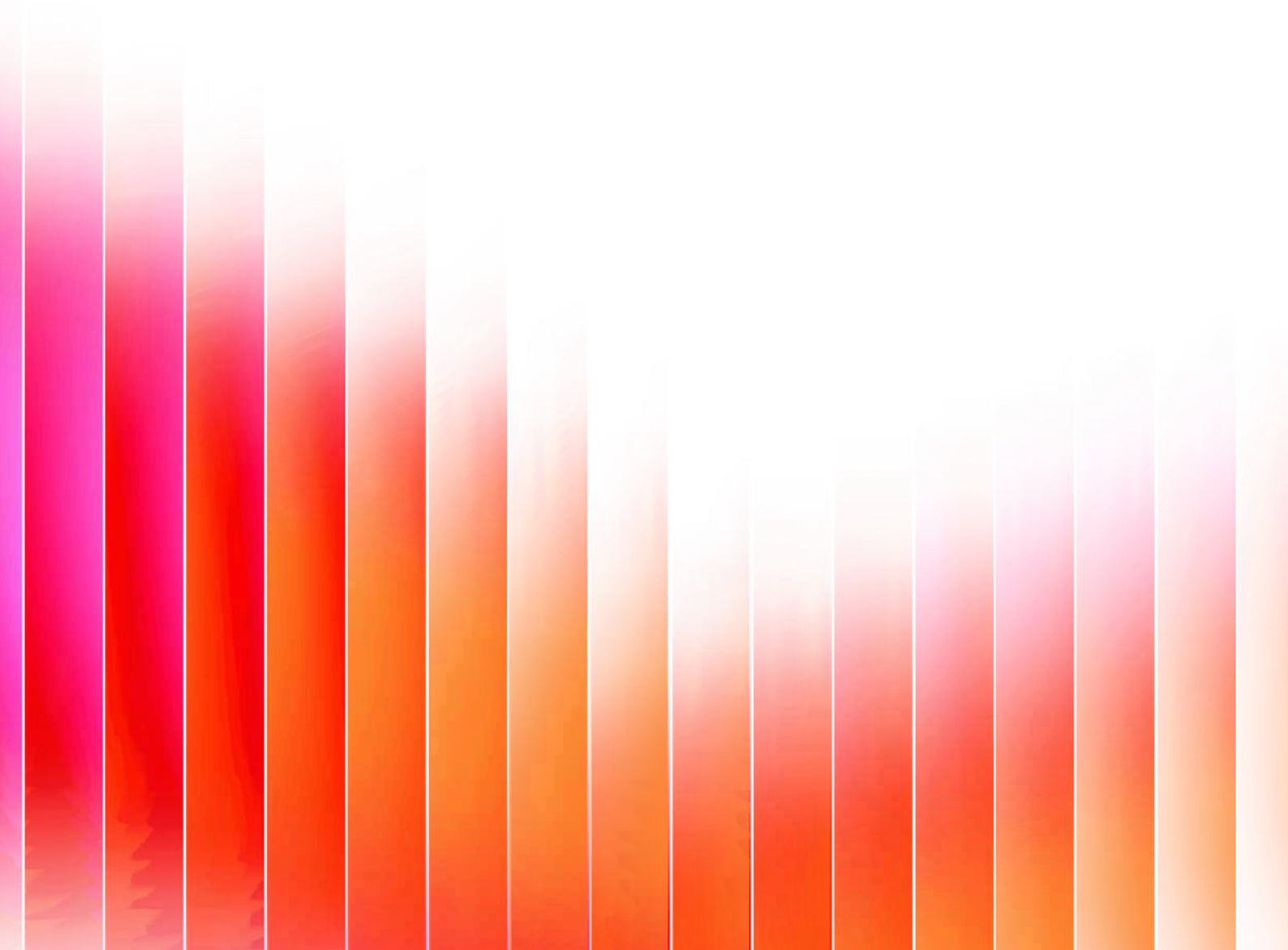
Price Commitments

Financial Relationship Expectations

The findings highlight a structural imbalance: agency expectations continue to expand while timelines and operating models lag behind, reinforcing the need for new, more agile ways of working.

- **Financial transparency is now a core trust driver.** Maintaining and reinforcing this strength is essential as procurement scrutiny intensifies.
- **Cost control must become more proactive**. Clients want agencies to act as financial stewards, not just execution partners.
- **Open financial dialogue is a competitive advantage.** Working sessions, shared dashboards, and joint governance can strengthen long-term relationships.
- **Fairness matters more than pricing level.** Agencies should frame pricing around value contribution and outcomes, not cost.
- **Incentive models should be simplified and demystified.** Rather than complex formulas, agencies should offer clear, measurable value-based options for clients who request them.

Client–Agency Operating Context



Respondent Profiles

Marketing Leaders in Dynamic, Brand-Driven Markets

Respondents come primarily from **consumer goods and service-heavy sectors,** where agency performance directly impacts market outcomes.

Their roles are overwhelmingly **marketing and senior leadership**, meaning expectations are shaped by strategic priorities rather than procurement constraints.

The geographic mix suggests a **pan-European but non-uniform view**, with strong input from emerging and mid-sized markets.*

TOP SECTORS

35% Consumer goods

12% Banking/Insurance

TOP ROLES

63% MarkComms leaders

32% Senior Executives

TOP COUNTRIES

19% Greece

11% Romania

9% Sweden

9% Iceland

**See Appendix 1 for more information.*

Client–Agency Operating Context

Agency Usage, Selection, Governance, and Perceptions

Clients navigate highly fragmented ecosystems, collaborating with nearly five agency types on average, yet creative and media agencies remain the strategic anchor points.

Budgets show a polarised structure, split between very small and very large spenders, while relationships tend to be long-term, with most partnerships extending beyond two years.

Decision-making is largely local, reflecting Europe's decentralised marketing landscape, and marketing teams—not procurement—drive agency selection, signalling a focus on value rather than cost.

Pitch activity is intense: nearly half of clients ran a competition in the past year, and two-thirds led to a change of agency, particularly in creative, media, and branding.

Importantly, agencies are viewed overwhelmingly as partners rather than suppliers, and clients primarily define them as creators, highlighting the premium placed on imagination, innovation, and brand-building impact.

Client–Agency Operating Context

Agency Ecosystems

Respondents work with an average of **4.7 different agency types**, confirming that marketing ecosystems are highly fragmented and hybrid.

The most common partners are:

- Creative agencies (76%)
- Media planning & buying agencies (76%)
- Branding & design agencies (64%)
- Corporate/PR/influencer agencies (60%)
- Digital/UX, social media, and event agencies appear in the mid-range (42–43%).

Production and full-service agencies are used less frequently, reflecting a move away from single-agency dependency toward specialised, orchestrated networks. **The model is definitively multi-agency, requiring coordination, governance, and clarity of roles.**

'Main Agency' Landscape

Although clients work with many partners, only a few occupy the central role:

- Creative agencies (28%) – the primary lead partner
- Media buying agencies (24%)
- Full-service agencies (21%)

Branding, social, digital, and PR agencies represent smaller shares. Production agencies never act as the main partner.

Clients still rely on agencies that control strategic and media investments to act as their core partners.

Client–Agency Operating Context

Budget Distribution

Budgets are polarised*:

- 35% spend under EUR 0.5M
- 15% spend above EUR 10M

Mid-range budgets (EUR 1–5M) account for a consistent 30%. This indicates a **mixed landscape**, with both mature advertisers and smaller challengers represented.

Agencies must adapt to highly variable scales of investment and operating models.

Relationship Length

Client loyalty is notable:

- 43% have worked with their main agency for over 5 years
- 28% for 2–5 years

Only 11% are in their first year of collaboration.

Long-term partnership is the norm. This reinforces the need for shared vision, trust, and continuous value creation.

**The result may be influenced by the specific profile of respondents.*

Client–Agency Operating Context

Governance of Choices

For both creative and media decisions, local autonomy dominates:

- Creative agency choice: **79% local**
- Media agency choice: **74% local**

Centralised processes (worldwide or European) remain limited (10–14%).

Europe's agency ecosystem remains heavily **decentralised**, requiring agencies to navigate highly diverse local expectations and competitive environments.

Agency Selection

Decision-making is led by marketing teams:

- 67% are directly in charge of decisions
- 28% advise
- Only 6% are not involved

Procurement plays no noticeable role.

Agency selection is marketing-driven, focusing on strategic fit, chemistry, and capability over procurement metrics.

**The result may be influenced by the specific profile of respondents.*

Client–Agency Operating Context

Pitching Dynamics

Pitch cycles are active:

- **46% participated in a pitch in the last year**
- Only 10% have not pitched in over 5 years

Most common pitch topics:

- Creative (43%)
- Media buying (30%)
- Branding (27%)
- Social media (18%)
- Digital/UX (12%)

65% of pitches resulted in a change of agency, showing high turnover in competitive categories.

Pitching is frequent and consequential. Agencies cannot rely on incumbency: performance must be continually demonstrated.

Perceptions of the Agency

Clients overwhelmingly view agencies as:

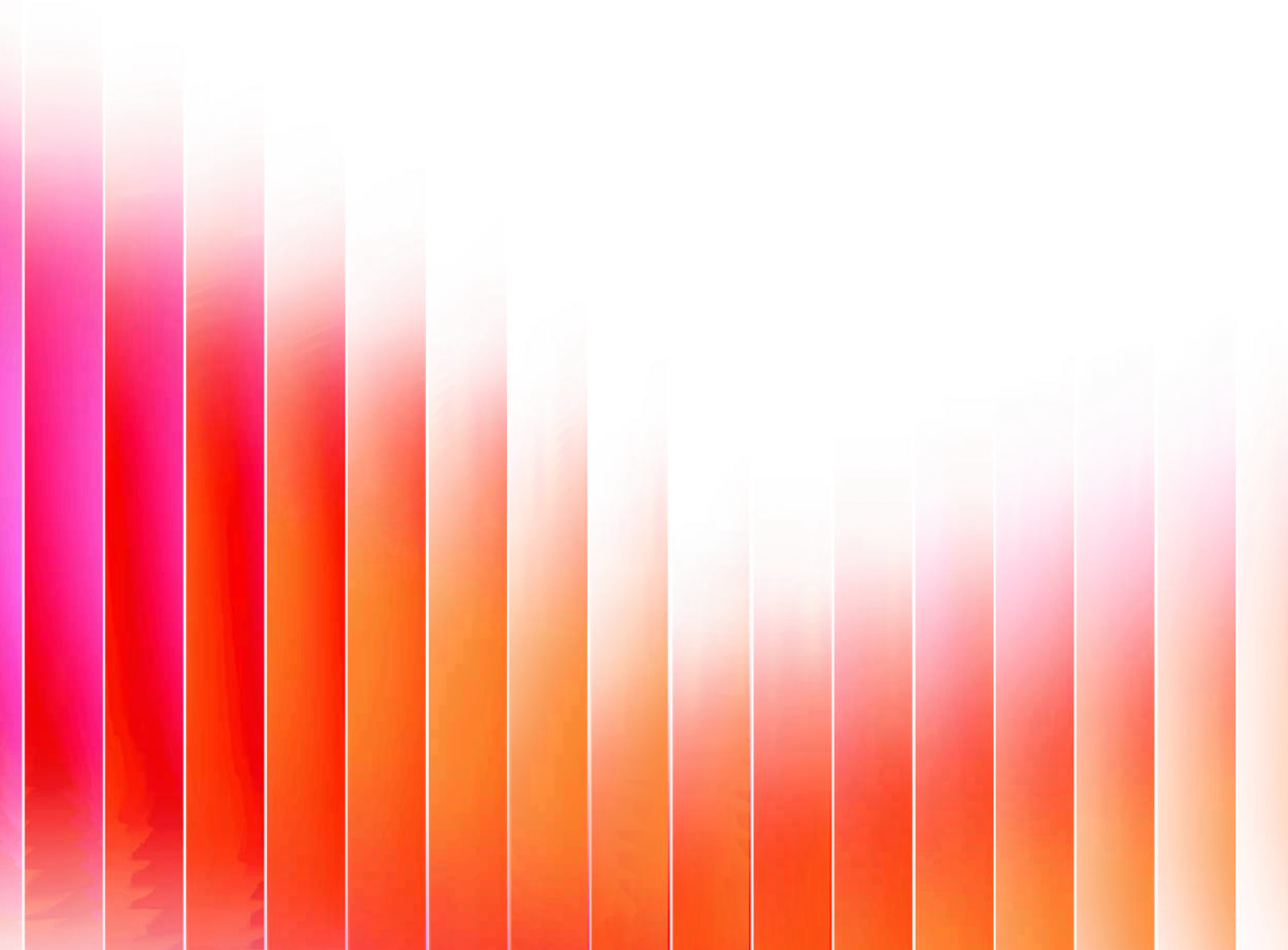
- **Partners (94%)**, not suppliers
- Only 2% consider agencies commodities

On identity:

- **50% see agencies as creators**
- **21% as facilitators**
- **21% as explorers**

Clients expect co-creation, strategic thinking, and inspiration. Agencies must act as intellectual and creative engines, not just executors.

Perception of Agency Relationships



How Clients Perceive Agencies

Clients see agencies as creative engines supported by facilitation and exploration capabilities. Satisfaction is solid, but differentiation lies in elevating creativity, initiative, and strategic partnership to transform satisfaction into advocacy.

- **Creativity is the emotional anchor of agency value:** With 50% citing "creator" as the defining role, agencies must protect and amplify their creative leadership while modernising creativity with data, AI, and cultural intelligence.
- **Satisfaction is high, but enthusiasm can be elevated:** The goal for agencies is to move clients from "satisfied" to "very satisfied" by demonstrating **greater proactivity, stronger business immersion, more innovative approaches**, and **visible senior involvement**.
- **The relationship is strong but not static:** Clients want creators who facilitate and explore—meaning agencies must behave as **dynamic partners**, not static service providers.

Agencies Are Primarily Seen As 'Creators' (50%)

Half of respondents define their agency first and foremost as a **creator**. This indicates that, despite the growing importance of data, technology, and operational excellence, creative differentiation remains the core expectation.

Clients fundamentally want agencies that imagine, invent, and elevate brands through original thinking. Creativity is still the strategic centre of the client–agency relationship. Agencies that dilute their creative edge risk undermining their perceived value.

How Clients Perceive Agencies

Agencies As Facilitators And Explorers (21% Each)

A facilitator signals expectations around **ease, support**, and **fluid collaboration**, while an explorer signals a desire for **curiosity, foresight**, and **discovery**.

Clients increasingly seek hybrid partners—agencies that both smooth execution (facilitator) and open new horizons (explorer). This reinforces the need for agencies to pair **operational agility with strategic exploration**.

Only 9% View Agencies As 'Other'

This low figure shows that the three archetypes—creator, explorer, facilitator—capture the overwhelming majority of how clients conceptualise agency value.

Agencies that over-position themselves as consultants, integrators, or technology providers must ensure these roles enhance—rather than replace—their creative and exploratory identity.

Strong Overall Satisfaction

- Satisfied: 45%
- Very satisfied: 26%

A combined **71% satisfaction rate**, indicating a generally healthy relationship baseline. **This suggests that agencies are meeting core expectations and performing reliably across most dimensions.**

How Clients Perceive Agencies

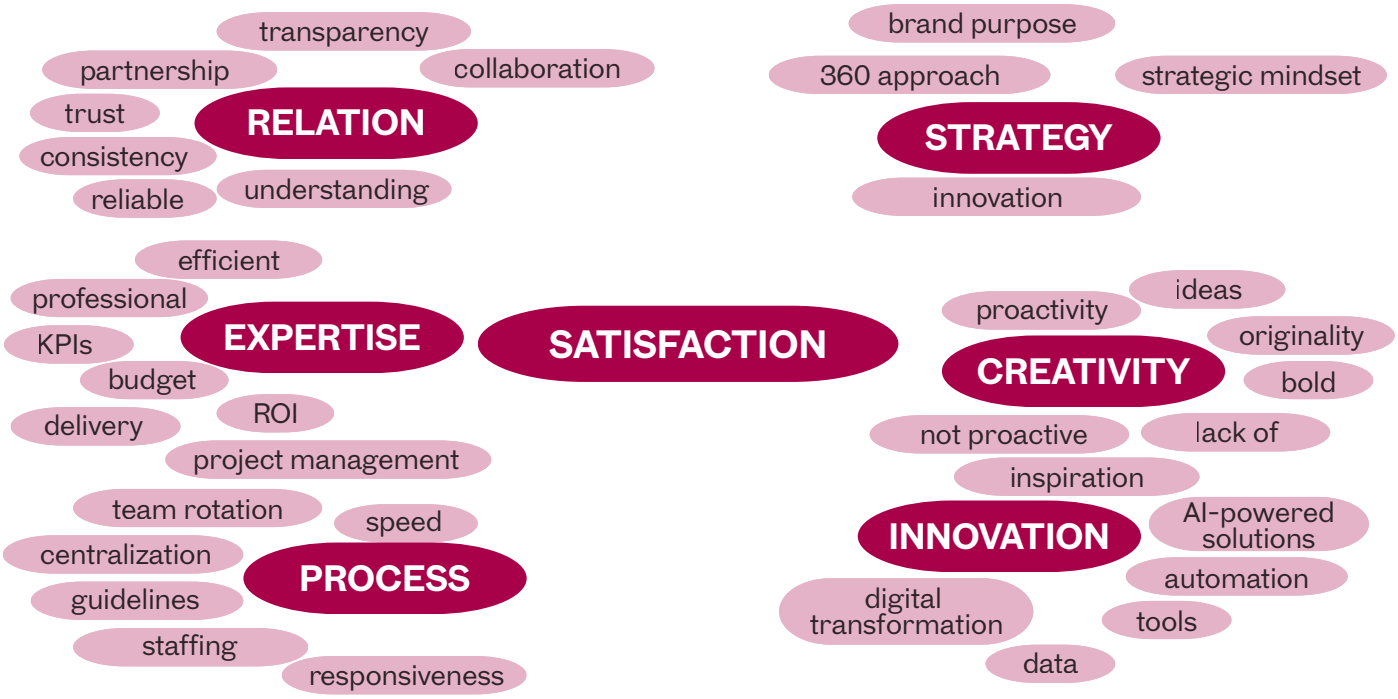
‘Quite Satisfied’ (23%) Indicates Opportunity

A significant share of clients sits in the *neutral-positive zone*—content but not enthusiastic.

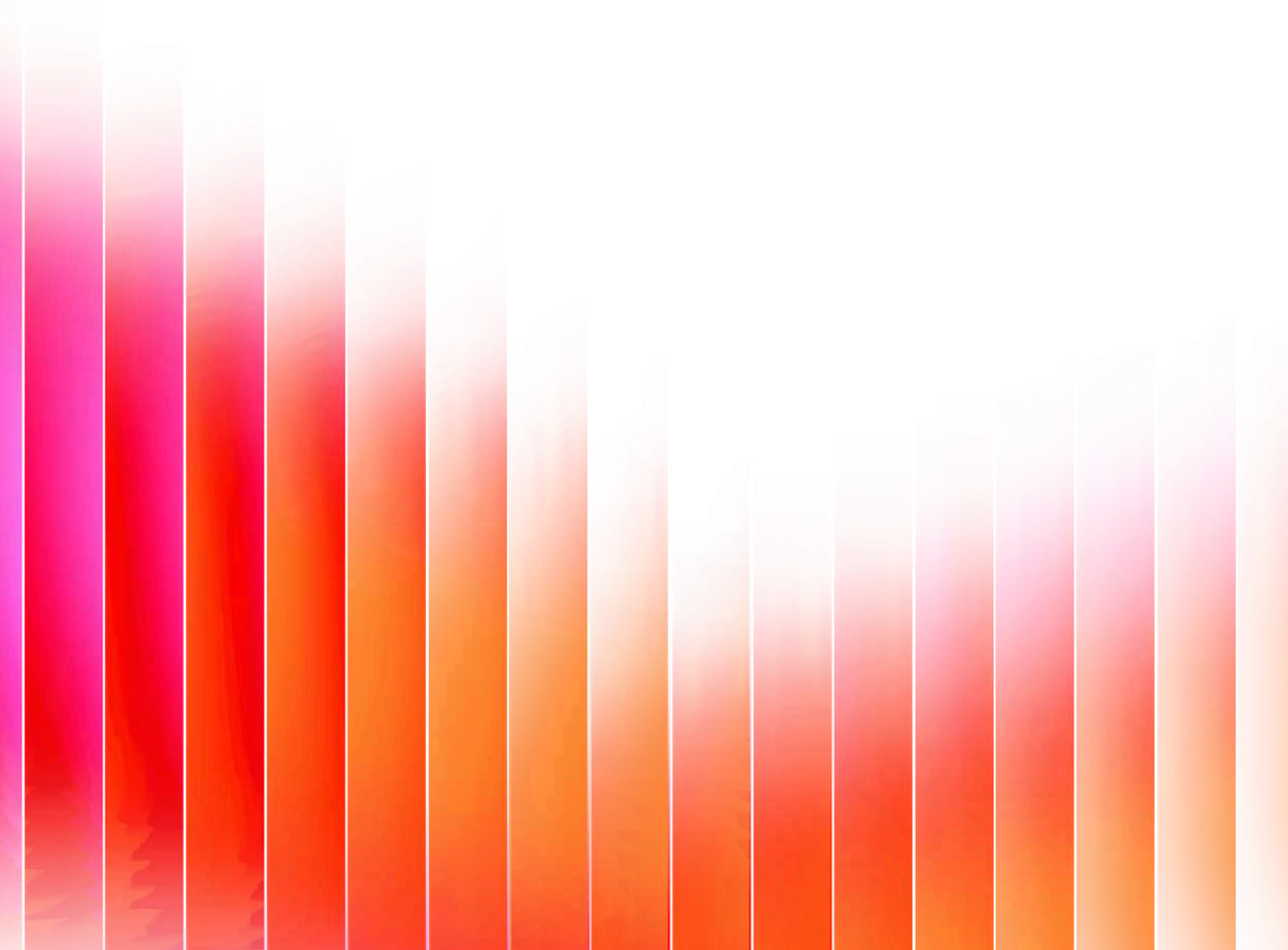
This segment is the most at risk of future churn, especially in competitive categories.

‘Not Very Satisfied’ Remains Low (6%)

Dissatisfaction is limited but noteworthy. These clients likely experience gaps in proactivity, innovation, or business understanding—consistent themes across the study.



Key Relationship Ingredients



Key Relationship Ingredients

What Clients Value Most

- A **human and sincere relationship**, based on transparency and respect.
- A deep **understanding of their business** and constraints.
- A **proactive, committed agency** focused on problem-solving.
- **Creativity with purpose**, anchored in strategic and business objectives.

What They Expect More Of

- Stronger intellectual and **strategic challenge, beyond execution**.
- A true advisory role, **questioning established habits** and pushing thinking forward.
- More agile and interactive collaboration, **less formal and more dynamic**.

A Relationship Model Based On Trust, Mutual Understanding, And Strategic Value Creation*



**See Appendix 2 for more information.*

Qualities & Actions Expected

The dataset reflects **mature and demanding client expectations**: agencies are seen not merely as executors but as **strategic partners** expected to combine **business insight, creativity, and proactivity**.

The ideal agency is **strategic, proactive, creative, and transparent**. It combines professional reliability with intellectual curiosity, delivers quickly and precisely, and challenges the client to grow rather than merely responding.

Clients expect agencies to:

1. **Think beyond execution:** Act as consultants, not suppliers.
2. **Blend creativity with business sense:** Bold yet relevant ideas.
3. **Show leadership through initiative:** Propose before being asked.
4. **Collaborate transparently:** Honesty and clarity over showmanship.
5. **Continuously evolve:** Follow market, technology, and consumer shifts

What Is Wanted From The Teams Running The Account Vs. What Is Expected Of The Agency

This question shifts the focus from the agency's identity and philosophy to the account team's daily behaviour and performance.

The tone of the responses is more operational, precise, and pragmatic — less about inspiration, more about executional excellence.

Qualities & Actions Expected

In short:

- The *agency* is expected to think, advise, and inspire.
- The *team* is expected to act, deliver, and embody trust through flawless execution.
- The **agency earns credibility through vision and creativity**, the account **team earns loyalty through reliability and ownership**.
- Together, they embody **the dual expectation of modern clients**: strategic intelligence at the top, operational excellence on the ground

The ideal account team is expected to:

- **Be proactive and accountable:** Owning the business as if it were their own.
- **Know the brand and the market deeply:** Connecting insights to execution.
- **Communicate constantly and clearly:** Ensuring transparency, speed, and no silos.
- **Deliver with rigor:** On brief, on time, on budget.
- **Act with empathy and engagement:** Respectful, collaborative, and passionate.
- **Bring pragmatic creativity:** Relevant, useful, and immediately actionable ideas.

Key Differences

Focus	Agency	Account team
Temporal scale	Long-term strategy	Day-to-day operations
Nature of impact	Inspire, guide, differentiate	Execute, secure, optimise
Type of leadership	Visionary	Service-oriented and solution-driven
Expected relationship	Strategic partnership	Reliable extension of the client's team
Client emotion	Admiration and trust	Reassurance and confidence

What Do You Want From The Team Running Your Account?



Account team – Operational role

The Culture Clients Want To Instill

This corpus highlights a clear hierarchy of expectations:

- Column 1: **Core values and mindset** (what defines the agency's DNA).
- Column 2: **Operational behaviours** (how the team should act).
- Column 3: **Results and working style** (what clients want to experience).

The responses depict an **ideal agency culture that is open, proactive, creative and accountable**, combining trust and innovation with business discipline.

Clients want **agencies whose culture mirrors their own ambitions** – open, proactive, creative, and accountable.

They expect not only what the agency does, but how it thinks and behaves – trustworthy in essence, collaborative in spirit, and bold in ideas.

The Ideal Agency Culture

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Strategic Discipline	Balance between vision and precision	Ensures consistency and impact

The Ideal Agency Culture:
Six Pillars Feeding Client Value

Openness & Trust

Transparent, authentic, ethical relationships

Proactivity & Ownership

Initiative, anticipation, accountability

Creativity & Curiousity

Constant innovation, bold ideas - inspiring, future-oriented partnership

Client Value & Partnership

Agility & Adaptability

Fast reaction, learning mindset - match to business pace

Collaboration & Empathy

Listening, co-creation, team alignment

Strategic Discipline

Balance vision and precision - consistency & impact

Mutual understanding & teamwork

Most Persuasive Claims

Key When Choosing an Agency

1. **Trust** is the dominant persuasion driver in agency selection, far outweighing creative or operational attributes. *"I would trust them with my own money", 1st choice: 49% (highest of all claims): Strong emotional indicator of reliability, ethics, and commercial maturity.*

2. Clients reward agencies that demonstrate **deep involvement in their business**, signalling a shift toward embedded partnership models. *"Actively involved in my business", 1st choice: 41%: Clear sign that proximity and immersion matter more than technical skills.*

3. **Market reputation acts as a broad reassurance factor**, consistently ranking in the top three even when not selected first. *"Strong reputation in market": 1st choice: 16% but combined top 3: 84% (41% + 43%): Reputation is less of a "#1" but consistently appears in top three. It acts as a credibility baseline.*

4. **Creative excellence** remains influential, particularly when validated externally, but is **no longer the primary selection criterion**. *"Known for delivering rewarded creative campaigns", 1st choice: 28%, Top 3: 72% (30% + 42%): Creativity still matters, especially if it is externally validated (awards, industry recognition).*

5. **Strategic capabilities—**business strategy and brand management—serve as essential decision anchors and reinforce credibility. *"Efficient in business strategy" – 29% first choice and "Efficient at brand management" – 30% first choice: Strategic capabilities remain core decision drivers. Agencies must show rigorous thinking and business acumen.*

Key When Choosing an Agency

6. **International expertise* influences only niche segments**, confirming its role as a situational rather than universal driver. *Creating international concepts – small base (N=15) and managing international accounts – very small base (N=8): international capability matters only for a minority segment of clients.*

7. **ESG/DEI engagement shows minimal persuasion power,** suggesting weak demand for sustainability-focused agency claims. *Very low base (N=4). This indicates limited market pull.*

8. Performance gaps appear around **business involvement and trustworthiness**, despite their critical influence on choice.

9. Agencies perform strongly on reputation and creativity but must **deepen strategic immersion and strengthen client stewardship**.

How Do Current Agencies Perform?

1. **Reputation vs. delivery**

Clients value reputation → agencies score strong here: *40% "4", 36% "Very well"*

→ Market credibility is already a strength.

2. **Active involvement in business**

Highly persuasive → current performance is average: *33% "3", 36% "4", only 21% "Very well"*

→ Major gap: agencies must intensify immersion and client-side partnership.

3. **Trustworthiness**

Highly persuasive → performance is moderate: *Only 20% "Very well"*

→ Critical improvement area for agency–client relationships.

4. **Efficiency in business strategy**

Expectation is high → performance is good but not outstanding: *45% "4", 23% "Very well"*

→ Agencies deliver solid strategy but lack excellence.

**Likely due to specific characteristics of respondents.*

How Do Current Agencies Perform?

5. **Creative excellence**

Expectation moderate → performance relatively strong: *43% "4", 24% "Very well"*

→ Creativity is an established asset.

6. **ESG/DEI involvement**

Low persuasion → weak performance. But this does not create a real gap because clients are not seeking it.



The future agency must "embedded"

Know their business

Understand pressures & constraints

Act as Operational partners



Trust be engineered, not assumed

Requires:

Financial transparency

Clear KPIs

Commitment to accountability



Creativity is essential but not sufficient

Strong business insight

Industry reputation

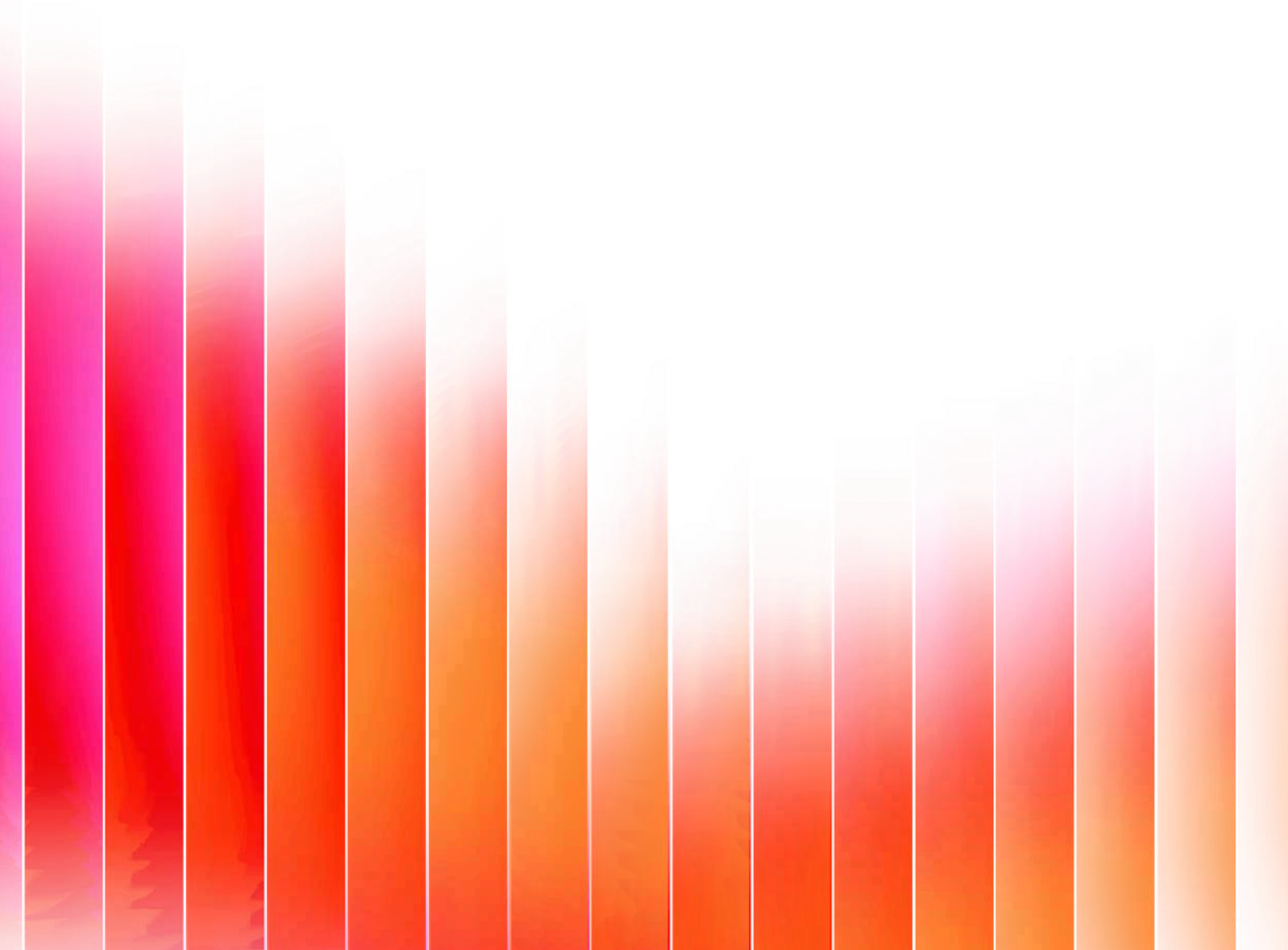
Client stewardship



Only great strategy makes a difference

Agencies must elevate from "good" to "excellent" in business strategy

Ideal Team To Work With



What Clients Want Most

1. **A strong "can-do mentality" is the top preference.** 47% rank it as their first choice, only 26–28% put it in second or third place. Clients strongly value **energy, solution-orientation, and forward momentum**. They want teams who remove friction, jump on challenges, and demonstrate ownership.

2. **Proactivity is nearly as important.** 35% name it as their first choice, 44% as their second choice. Clients want teams that **anticipate needs**, bring ideas, and push business growth—not teams who simply execute briefs.

3. **Innovation is a significant preference.** 37% first choice, balanced spread across other ranks. Innovation remains a key differentiator—but it is **positioned after mindset and proactivity**.

4. **'Refreshing and pertinent proposals' matter, but less intensely**. Only 36% list it as top choice, 38% put the item in 3rd position. Relevance matters, but it is not the primary driver of preference compared to momentum and innovation.

5. **Adaptability is appreciated but not top-ranked.** Only 18% first choice, but a large 82% place it 2nd or 3rd. Adaptation is expected, but it's considered a **hygiene factor**, not a differentiator.

6. Speed (rapid answers) is the least valued. 11% rank it first, 57% rank it third. Responsiveness is important but **does not override strategic, creative, or collaborative qualities**. Clients are not looking for 'fast first'—but for *smart*, *proactive*, *can-do* partners.

How Current Agencies Perform

Comparing expectations to actual performance reveals three major gaps and three strengths.

A. Performance strengths

1. **Can-do mentality:** 43% rate agencies as “4”, 27% rate “very well” **→ Strong alignment with what clients want most.**

2. **Innovation:** 41% “4”, 16% “very well” **→ Agencies are perceived as innovative. Still below expectations** (innovation is top 3).

3. **Relevance and pertinence:** 44% “4”, 11% “very well” **→ Agencies deliver appropriate proposals, but may lack sharpness or unexpected thinking.**

B. Critical gaps between expectation and perceived delivery

1. **Proactivity** (largest misalignment). Proactivity is the #2 most important attribute (35% first choice). Only 18% say agencies perform it very well. A combined 49% rate it as “3 or below”. **→ This is the biggest opportunity for differentiation.**

2. **Adaptability**. 82% rank adaptability in top 3. Only 22% of agencies perform “very well”. **→ Clients expect more flexibility and real-time adjustment.**

3. **Speed**. Low persuasion factor (speed is last), but performance is also low (18% very well). **→ Not a priority gap, but still an area for operational reinforcement.**

Clients' Priorities When Choosing An Agency Team

1. **Deep understanding of their business (top priority).** 39% select this as their first choice. It is the strongest driver in the selection process. *Clients expect their agency teams to operate as true business partners, not simply creative or production providers. Business fluency, market intelligence, and strategic contextualisation are increasingly decisive.*

2. **Shared ambitions for the brand.** 38% list this as top choice among those exposed to the question. *Clients value teams that demonstrate alignment with their strategic trajectory and long-term brand vision. Emotional and strategic resonance is becoming a differentiator as markets become more complex.*

3. **Delivery excellence (on time, high quality).** 32% rank this as first choice, 39% in second position. *Operational reliability remains non-negotiable. Agencies must deliver clarity, consistency, and predictable outcomes, especially as planning cycles shorten and stakeholders increase.*

4. **High-quality staff involvement.** Evenly spread (32%–35%–33% across positions). *Senior expertise and the presence of strong talent reinforce trust. Clients expect access to high-calibre individuals capable of elevating thinking and execution.*

5. **A strong working relationship.** Only 26% rank it as top choice, but 58% rank it third. *Relationship quality is essential but not a primary selection filter. It amplifies performance but does not compensate for weak strategic or operational delivery.*

6. **Management involvement (low reach, moderate importance).** Small sample (N=15), with a balanced distribution. *Clients do not necessarily expect constant top-management presence—yet targeted, high-impact interventions could play a more strategic role.*

How Agencies Perform Today

Overall, agencies perform relatively well, but several strategic opportunities emerge.

A. Strong Performance Areas

- **Business understanding:** 71% rate their agency from "good" to "very well". Performance is solid, but expectations are even higher.
- **Shared ambitions:** 73% rate positive. Agencies demonstrate strategic alignment but could express it more proactively.
- **Quality of working relationship:** 79% positive. Agencies excel at collaboration, empathy, and day-to-day partnership.
- **High-quality staffing:** 68% positive. Clients recognise expertise, but talent consistency must be maintained.
- **On-time, high-quality delivery:** 66% positive. Operational performance is strong and a solid foundation to build on.

B. Strategic Opportunities

Even with strong results, three gaps stand out:

- **Management involvement:** Only 17% say “very well”. Reinforce leadership visibility during critical phases—strategic framing, key presentations, quarterly reviews—to strengthen trust and long-term alignment.
- **Business understanding vs. expectations:** While performance is positive, expectations are extremely high. Agencies will benefit from: deeper immersion in client categories, stronger data-driven diagnostics, forward-looking market interpretation.
- **Shared ambition for the brand:** Agencies perform well, but this area is emotionally charged and highly valued. Make ambition explicit—co-design brand trajectories, challenge assumptions, and articulate bold, future-facing visions for growth.

Strategic Synthesis

Clients want teams that provide:

- Business insight and strategic intelligence
- Vision alignment and shared ambition
- Consistent, high-quality delivery
- Senior expertise and strong staffing
- A trustworthy, collaborative relationship

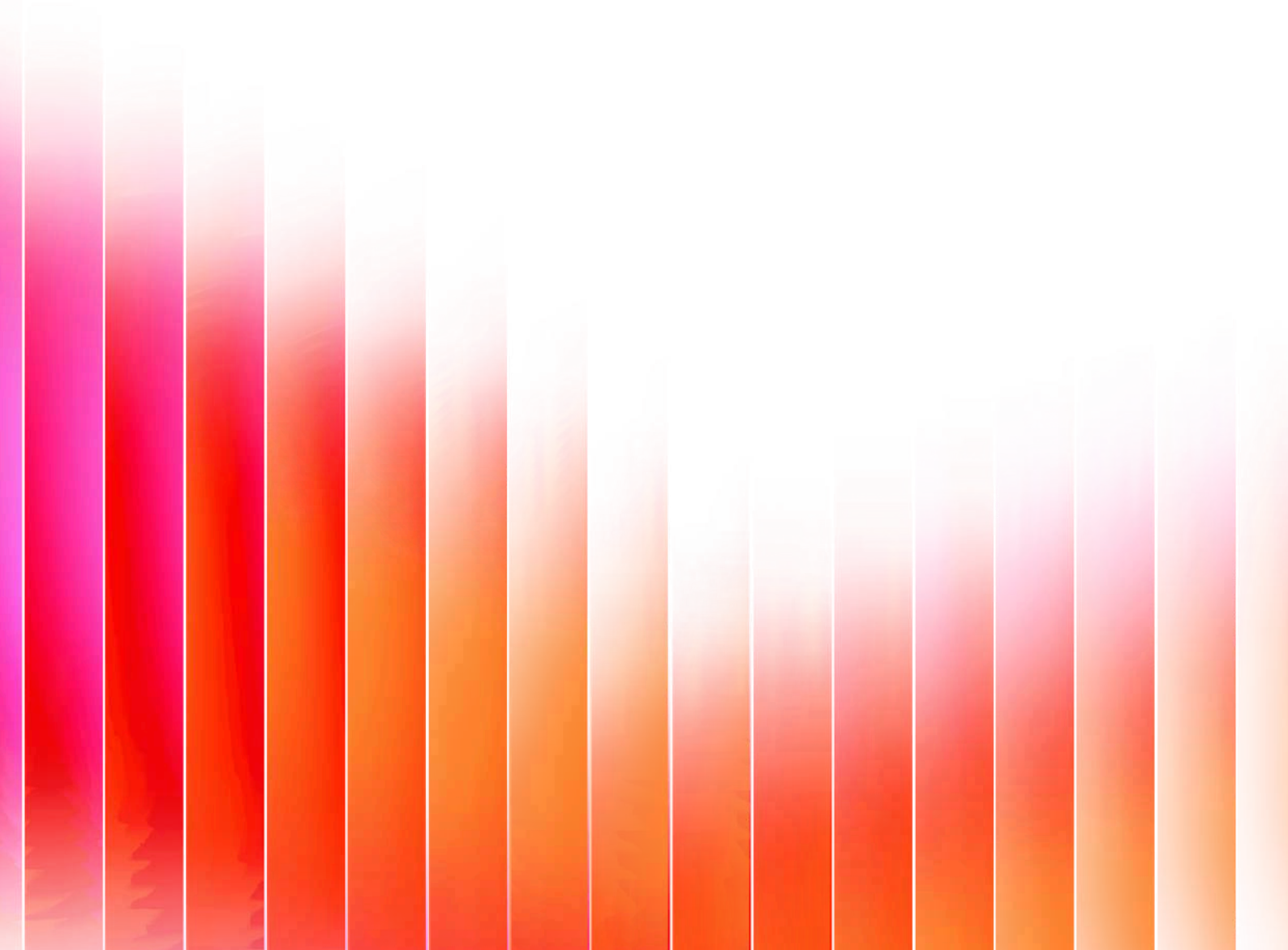
Agencies are performing well but must evolve by:

- Elevating strategic leadership
- Demonstrating stronger business acumen
- Improving narrative and ambition around brand futures
- Maintaining talent excellence
- Strengthening delivery rituals and governance

The future-winning agency team will be one that:

- Thinks like a business partner
- Acts like a strategic architect
- Delivers like an operational powerhouse
- Collaborates like an embedded extension of the client team
- Inspires through ambition, creativity, and forward vision

Services & Agency Capabilities



Leading Agency Capabilities

What Clients Consider Most Important

6 dominant expectations, reflecting a market where clients seek both operational reliability and strategic advancement:

1. **Ability to manage the entire cross-media ecosystem** (strongest priority). 43% rank it as their top choice, the highest across all items. Only 22% place it in third position. *Clients want agencies capable of orchestrating a fully integrated media and digital ecosystem—ensuring coherence, efficiency, and impact across channels. Fragmented execution is no longer acceptable.*

2. **Delivering on the promise: consistency and reliability.** Combined top-two choices: 62%. One of the most valued basic capabilities. *Operational discipline is foundational. Agencies must guarantee that commitments translate into tangible outputs, meeting expectations with a high degree of reliability.*

3. **Realism about capabilities (transparency over ambition).** 36% rank it first; a total of 64% place it first or second. *Clients value agencies that know their limits, avoid overselling, and clearly define what they can and cannot deliver. Transparency is increasingly a competitive advantage.*

4. **Aspiration and initiative to build the brand.** Around 36% rank this first; distribution is nearly even across the three positions. *Clients look for proactive leadership—agencies that propose, challenge, and push brand thinking further. They expect ambition, curiosity, and strategic drive.*

5. **Technology, digital and AI expertise**. Top two positions: 69% combined. *Tech maturity is a decisive capability. Data, AI, automation, and digital integration are now considered core components of brand building. Agencies must demonstrate credible, future-ready expertise.*

6. **Cross-disciplinary (full-service) capability.** Evenly spread demand (31%–33%–35%). *Clients appreciate integrated thinking, but do not necessarily see full-service models as a top priority. Value lies more in coordination quality than in breadth for its own sake.*

7. **Worldwide network (lowest importance).** Only 25% rank it first; 45% rank it last. *Global scale is useful but not a core selection driver. Clients prioritise capability, insight, and integration over footprint.*

How Agencies Currently Perform

The evaluation of current agencies indicates solid performance on fundamentals, with clear improvement opportunities in advanced capabilities.

A. Strong Performance Areas

- **Delivering promised services (69% positive):** 45% good, 24% very good. *Clients experience reliability and operational consistency—an essential foundation.*

- **Transparency about capabilities (65% positive):** Agencies are generally perceived as honest and realistic. *Trust is reinforced through clarity and boundaries.*

- **Proactive support for brand building (63% positive):** 43% rating good, 20% very good. *Agencies show ambition, but clients expect even more foresight and initiative.*

- **Cross-media ecosystem management (58% positive):** Strong "good" ratings (40%) but a limited "very good" (18%). *Execution is competent, yet optimisation and true integration remain areas to strengthen—especially across digital, performance marketing, and programmatic.*

How Agencies Currently Perform

B. Moderate Performance Areas (Strategic Opportunities)

- **Technology, AI, and digital expertise** (only 38% good and 14% very good). This is **the largest underperformance vs. importance.** *Clients expect AI-driven insights, marketing automation, and data-powered creativity—areas where agencies lag behind expectations.*
- **Full-service / cross-disciplinary proposals:** Only 16% very good. *Clients want a smoother, more integrated offering, able to connect insights, creativity, media, and technology seamlessly.*
- **Worldwide network:** Lowest performance (only 10% very good). *This is not a strategic priority for clients, nor a significant differentiator.*

Tension Points

- Clients want **orchestration capability**, not necessarily a fully integrated agency. Future winners will excel at **coordination, interoperability, and cross-channel intelligence.**
- **AI and technology as the new credibility markers:** Demand is high, satisfaction is low. Agencies must urgently elevate their **AI maturity**, from tooling to strategic advisory.
- **Proactivity and brand leadership should increase:** Clients want agencies that **drive the agenda**, propose new paths, and anticipate future challenges.
- **Transparency as a differentiator**: Agencies that clearly articulate scope, limits, and value creation build higher trust and longer partnerships.

Agency Output For The Brand

What Clients Value In Agency Output

1. **Creative excellence is the strongest priority. 41% rank creative campaigns as their #1 priority** — the highest first-choice score in the dataset. Creativity remains the most visible and differentiating output for agencies. It is a primary selection filter.

2. **Effective campaigns are nearly as important. 36% choose effective campaigns as their top priority.** Creative work must translate into effectiveness—clients look for ideas that drive measurable impact.

3. **Breakthrough work grounded in genuine insights ranks consistently high.** Evenly distributed: **31% first, 33% second, 36% third.** Insight-driven thinking is a foundational expectation and a key driver of perceived strategic value.

4. **ROI and KPI monitoring is essential but rarely the top priority.** Only **25% rank it first**, but **47% rank it third**. ROI tracking is expected as a hygiene factor—critical for governance but less emotionally persuasive.

5. **Lead-agency effectiveness matters for a smaller group.** Around one-third across all ranks (35–33–33%). Leadership capability is important but depends on whether the client operates with a lead-agency model.

6. **Collaboration with the lead agency ranks lower overall.** Highest weight in third place (44%). Collaboration is essential but considered a secondary requirement—more operational than strategic.

How Agencies Actually Perform Today

Overall performance is moderately strong, but several opportunity gaps emerge.

A. Strengths

- **Effective campaigns:** 48% rate performance as “4”, 18% “Very well”. Agencies deliver reliably on execution.
- **Creative campaigns:** 43% “4”, 18% “Very well”. Delivery aligns well with client expectations for creativity.
- **Lead-agency effectiveness:** 37% “4”, 21% “Very well”. Agencies demonstrate coordination and leadership capability.

B. Moderate Performance

- **Breakthrough insight-based work:** Only 13% "Very well", although 45% give a score of “4”. Insight generation is solid but not perceived as truly exceptional.
- **ROI & KPI monitoring:** Only 11% “Very well”—the lowest high-score rating. *This is a systemic weakness despite being a core expectation.*
- **Collaboration with a lead agency:** 16% “Very well”, with 39% scoring “3”. Collaboration is adequate but inconsistent.

Gaps Between Importance and Performance

GAP 1 — Breakthrough insight work
Highly valued, but relatively low "Very well" performance (13%). *Opportunity: Strengthen research, data interpretation, and strategic planning capabilities.*

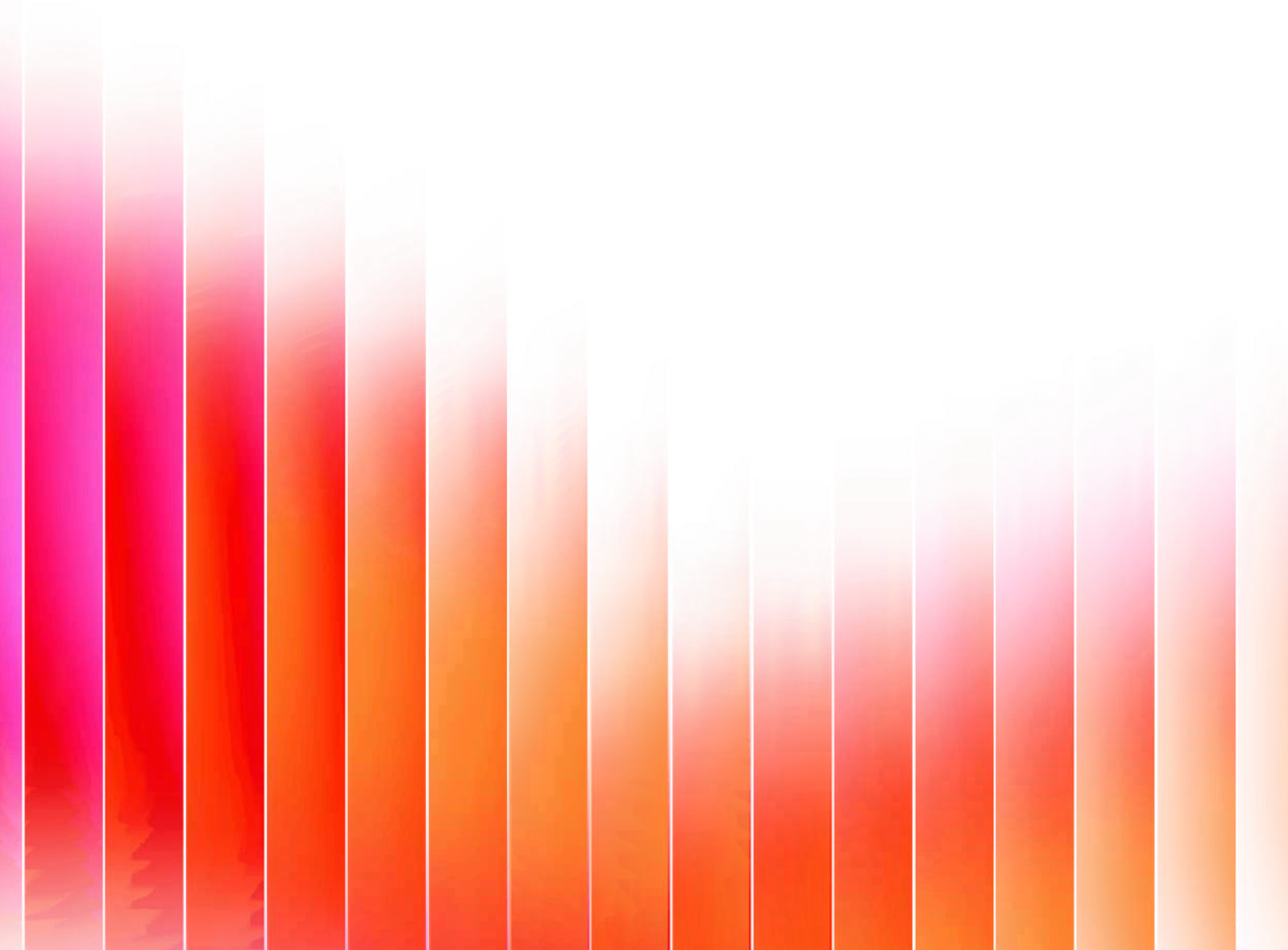
GAP 2 — ROI monitoring and KPI follow-up
Critical expectation, but weakest performance area. *Opportunity: Invest in analytics, dashboarding, and performance reporting systems.*

GAP 3 — Collaboration across the ecosystem
Important for integrated brands → middling performance. *Opportunity: Build integrated workflows, shared processes, and multi-agency governance.*

Strategic Implications for Agencies

1. **Redesign insight processes:** Better data mining, cultural intelligence, predictive analytics.
2. **Strengthen performance measurement:** KPIs, dashboards, attribution frameworks.
3. **Elevate creative effectiveness:** Link creativity more explicitly to business outcomes.
4. **Enhance coordination roles:** Lead-agency excellence and multi-agency collaboration models.
5. **Demonstrate innovation in both creativity and performance tracking.**

Price Commitments & Financials



Financial Expectations

Clients prioritise **transparency, fairness, and open financial dialogue** far above pricing mechanics or remuneration innovation.

While agencies perform strongly on transparency and rate fairness, **they fall short on cost-control rigour and incentive-based models, revealing** operational opportunities rather than strategic gaps.

Future-proof agencies will strengthen proactive financial governance, maintain open money conversations, and frame their pricing more clearly around delivered value and brand impact.

Clients' Top Preferences

1. **Transparency is the dominant expectation: 42% rank transparency as their #1 priority**, the highest score across all items. *Clients demand clarity on scope, pricing structure, and what they are paying for. Opacity is no longer tolerated in a procurement environment driven by accountability.*

2. **Fair rates are the second foundational requirement.** 31% assign it as their top choice, and the the distribution is balanced (31–34–35%). *Clients seek price fairness, not necessarily low pricing. Perceived value and proportionality are key.*

3. **Open money discussions are almost equally important.** 32% rank this first; 36% rank it second. *Clients want financial conversations to be direct, constructive, and free of tension. Agencies must treat finances as a shared business issue rather than a sensitive topic.*

4. **Cost control matters, but mostly as a "third-choice priority".** Only 23% rank cost control as #1, but **44% rank it #3**. *Ongoing cost optimisation is expected, but it is not a strategic differentiator—more a structural, operational expectation.*

5. **Incentive-based remuneration is not a major persuasion factor.** 33% rank it first, but the low base (N=40) indicates niche interest. *Interest exists, but clients do not expect agencies to compete primarily through variable compensation schemes.*

6. **Standardised packages appeal to a small segment.** N=21, evenly distributed (33–33–33). *A minority values productised offers. Most clients prefer custom solutions over rigid pricing grids.*

How Agencies Currently Perform

A. Strong Performance Areas

Transparency: 45% rate agencies as "4", 27% "Very well"

- **Alignment:** Agencies deliver well on the #1 expectation. This is a competitive strength.

Open money discussions: 35% rate "4", 30% "Very well"

- **Alignment:** Agencies communicate well on financial issues, meeting a critical client expectation.

Fair rates: 43% rate them "4", 20% "Very well"

- **Alignment:** Agencies are broadly perceived as reasonably priced.

B. Moderate To Weak Areas

Standardised offers: 44% rate performance as "3", only 15% "Very well"

- Not a concern, since demand is low, but improvement could support operational simplification.

Cost control: 18% "Very well", 33% "3"

- **Gap:** Clients expect more disciplined, proactive tracking and optimisation of budgets.

Incentive-based remuneration: Only 14% "Very well"

- **Gap:** Agencies struggle to articulate or operationalise variable remuneration, even though interest is limited.

Strategic Implications

1. **Financial transparency is now a core trust driver**
   Maintaining and reinforcing this strength is essential as procurement scrutiny intensifies.

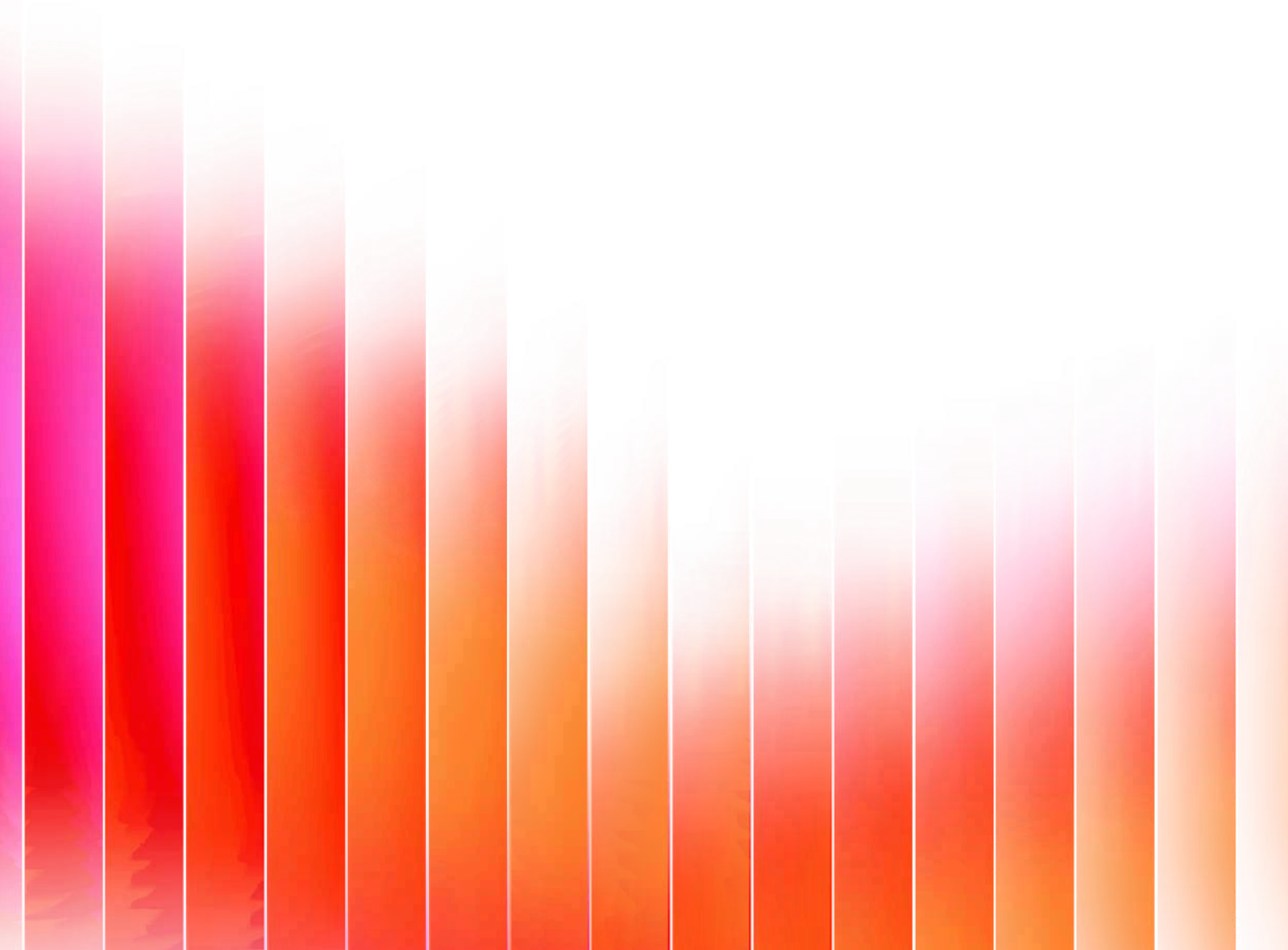
2. **Cost control must become more proactive**
   Clients want agencies to act as financial stewards, not just execution partners.

3. **Open financial dialogue is a competitive advantage**
   Working sessions, shared dashboards, and joint governance can strengthen long-term relationships.

4. **Fairness matters more than pricing level**
   Agencies should frame pricing around **value contribution and outcomes**, not cost.

5. **Incentive models should be simplified and demystified**
   Rather than complex formulas, agencies should offer clear, measurable value-based options for clients who request them.

Vision For The Agency Of The Future



Vision For The Future

The agency of the future is:

AI-powered, insight-driven, deeply embedded in client organisations, and human at its creative core. It is agile, ethical, transparent, and relentlessly focused on business growth. It operates through fluid, modular teams and activates creativity, strategy, and technology in one integrated system.

In short:

Intelligence + Creativity + Integration + Impact are the four engines defining the agency model of tomorrow.

Major Breakpoints Compared with Today's Agencies

Clients envision a complete operating transformation, not an incremental evolution.

Old Model	Future Model
Siloed disciplines	Fully integrated ecosystems
Time-based fees	Output & value-based models
Reactive execution	Anticipatory, real-time optimisation
External vendor	Embedded strategic partner
Heavy manual processes	Automated + AI-augmented
Fixed teams	Fluid, multidisciplinary squads
Big idea only	Impact-led, measurable solutions

Six Dominant Pillars Structuring the Future Agency Vision

PILLAR 1: AI-Native, Insight-Driven, Automated.
Key signals: *AI-enabled, data-smart, real-time optimisation, live dashboards, automation*

What clients expect:

- Automated campaign production and operations
- Real-time decisioning powered by first-party and behavioural data
- AI used to accelerate insight generation and scenario modelling

PILLAR 2: Full Integration with Client Teams.
Key signals: *extension of the team, embedded, "No we or them—it's us", hybrid with in-house.*

What clients expect:

- Agencies working as fully integrated partners
- Shared platforms, shared KPIs, shared processes
- Deep business understanding equal to that of a brand manager
- A co-owned responsibility for growth and outcomes

PILLAR 3: Human Creativity at the Core.
Key signals: *human creativity, insight-driven, culturally relevant, "ideas can come from anyone".*

What clients expect:

- Authentic creative leadership
- Strong cultural intelligence layered on data insights
- Ideas that combine boldness with business impact
- A creative point of view that brings differentiation

PILLAR 4: Fluid, Modular, 'Liquid' Operating Model.
Key signals: *fluid teams, project-based squads, hybrid structures, full-service + specialist networks.*

What clients expect:

- Multidisciplinary, on-demand teams
- The ability to mobilise niche specialists instantly
- Seamless hybrid work with internal client teams
- Dynamic structures that adapt to business needs

Six Dominant Pillars Structuring the Future Agency Vision

PILLAR 5: Radical Transparency, Governance & Ethics

Key signals: *transparent, ethical, clear governance, purpose-driven, brand safety.*

What clients expect:

- End-to-end transparency: costs, methods, data, outputs
- Ethical and responsible use of AI and data
- Clear accountability mechanisms
- A values-driven culture aligned with client principles

PILLAR 6: Business Impact as the Primary Output

Key signals: *ROI-driven, business outcomes, strategic partner, revenue impact.*

What clients expect:

- Work that creates measurable business value
- Stronger strategic leadership and foresight
- A shift from "time-based billing" to output/value-based models
- Integrated performance measurement across all touchpoints

Future Service & Expertise Offer

Based on the scoring patterns, **the future agency must combine**:

- AI-driven operations
- End-to-end strategic partnership
- Data mastery and real-time intelligence
- Strong digital product & experience capabilities
- Integrated service delivery
- Access to niche experts on demand

While **de-emphasising**:

- Traditional production
- DEI as a standalone offer
- Sustainability, unless directly linked to performance or brand reputation

Global Ranking Based On Average Scores

Top-tier expectations (scores ~4.5–5.0): These are the *core pillars* clients expect from a future agency.

1. **AI Enhancement** – *Very high priority* (consistently rated 4-5). Clients want AI-native services: optimisation, automation, insight generation, creative augmentation.

2. **Business & Marketing Strategy** – *Critical* (close to the top of the ranking). Agencies must act as strategic advisors, not production vendors.

3. **Data Management** – *Foundational capability* (high scores across all responses). Refers to data governance, analytics, modelling, dashboards, real-time optimisation.

4. **Digital Experience: Products & Services** – *Essential* (strong ratings across markets). Covers UX, service design, digital products, CX innovation.

Second-tier expectations (scores ~4.0–4.4): Still very important, but less dominant than strategic and AI/data layers.

5. **Full Service:** Strong expectation for integrated, cross-channel, one-team models.

6. **Specialised Expertise:** Clients want deep, niche expertise when required.

7. **Specialists' Assembling:** Demand for "fluid", "on-demand", multi-expert teams.

Global Ranking Based On Average Scores

Third-tier expectations (scores ~3.4–3.9): Valuable, but not the primary dimension of future readiness.

8. P**roduction: Expected, but not a differentiator. Clients assume basic excellence here; not a future-facing value.**

Fourth-tier expectations (scores ~2.5–3.2): Low comparative priority.

9. **Sustainability:** Surprisingly moderate ratings. Interpreted as important but not systematically required or clearly defined.

10. **DEI.** The lowest-scoring dimension. Still relevant, but less central to the "future services" compared to AI, data, strategy or integration.

Primary Areas Of Investment*

Technology and **AI** are the principal investment priorities shaping future agency competitiveness.

Creative excellence remains essential but must evolve with data, culture, and AI.

Clients are looking for **genuinely new services, not marginal upgrades**. Consultancy capabilities are increasingly expected, though not universally. Process excellence is necessary but no longer differentiating. Market intelligence plays a supporting, not leading, role.

Cost-reduction sits at the bottom of investment priorities.

Ultimately, clients want agencies that **fuse technological mastery with creative brilliance**. This requires **hybrid talent**—creative, data, tech, and consulting combined—supported by a **modern, scalable operating model**.

Optimal Contractual Approach

Long-term partnerships clearly emerge as the most preferred contractual model. Project-based agreements also perform strongly as a complementary format. Campaign-based contracts remain acceptable but are not top choices. Annual contracts are functional yet lack strong client advocacy.

Most respondents favour hybrid models that blend long-term and short-term engagements. Many support retainer models linked to performance or outcomes. Others explicitly **reject rigid structures (contracts)**, preferring trust-based long-term collaboration. **Flexibility and adaptability** are consistent expectations across responses. Clients want strategic continuity combined with operational agility.

The optimal model is a **multi-year strategic partnership** supported by **modular, project-based execution**.

**Ratings 1–5 across seven investment priorities. See Appendix 6 for more information.*

The open-ended qualitative responses to the question are particularly rich and indicate a clear pattern: **clients want flexible long-term partnerships, not rigid contracts**.

Three hybrid models emerge:

- **Hybrid Model A:** Long-term retainer + project work
- **Hybrid Model B:** Multi-year partnership + no-lock-in flexibility
- **Hybrid Model C:** Performance-based retainers

A dual expectation: Clients want strategic continuity (LT) and operational flexibility (ST) simultaneously.

The "ideal" appears as:
A long-term strategic partnership supported by flexible, project-based operational contracts. This aligns with the growing expectation for agencies to behave as embedded allies, not vendors, while still preserving the agility required by fast-changing market cycles

Optimal Future Remuneration Model

The data shows a clear **shift toward deliverables-based and brand-performance-based** remuneration, which dominate client preferences. Respondents repeatedly favour **hybrid models**, combining clear scopes of work with outcome-driven incentives. Deliverables-based pricing provides the desired predictability and transparency, while performance components reinforce accountability and ROI alignment. Retainer models remain relevant but mostly as a strategic base layer, not a standalone solution. Traditional formats (time-based costing, commissions, and equity swaps) are marginal and perceived as misaligned with the strategic value agencies are expected to deliver.

Open responses consistently emphasise three expectations:

- clear, value-based deliverables;
- shared responsibility for business outcomes;
- flexible structures that can adapt to evolving needs.

Strategically, the future model is hybrid, transparent, flexible, and value-oriented, balancing predictability with performance incentives.

Optimal Future Remuneration Model

A synthesis of respondent feedback points to a **'3-layer model'**: deliverables as the core, a light retainer for continuity, and a performance-based component tied to agreed KPIs. This structure best aligns agency remuneration with long-term partnership and business impact.

A. Overall Quantitative Insight

Across the dataset, the most frequently selected models indicate a strong preference for deliverables-based and brand-performance-based remuneration.

Ranking by frequency (approximate from visible data):

1. **Deliverables-based** – most common
2. **Brand performance** – consistently high
3. **Retained team** – moderate adoption
4. **Cost accounting** – niche but still present
5. **Commission** – rare
6. **Equity-based** – extremely marginal
7. **Other** – where respondents describe hybrid solutions

Clients want predictability and accountabilitym but not in isolation. Many respondents express that value must be clearly linked to outputs and outcomes rather than time spent or commissions.

B. Key Themes From Open-Ended Questions

- The **rise of hybrid remuneration models** (dominant theme). Many respondents explicitly reject the idea of a single model. Clients want flexibility.
- **Deliverables-based models are the stable foundation.** This model is the backbone of many hybrid proposed systems. Comments reinforce that agencies should provide crystal-clear deliverables, and pricing must **reflect value rather than effort**.
- Brand Performance & KPI-based components are increasingly expected.
- **Low interest in time-based or commission-based models**. Cost accounting appears occasionally useful, but rarely preferred. Commission is almost entirely rejected. Equity-based is mentioned but not desired broadly.
- **Retainer models remain relevant—but as part of a broader system.**

Proposed Future Remuneration Model

C. Proposed Model: '3-Layer Model'

To reiterate, respondent feedback consistently reinforces the need for a more balanced and future-fit remuneration approach:

- Deliverables-based core
- Retained strategic layer
- Performance-linked bonus

This model emerges as the most credible way to align agency compensation with long-term partnership, shared accountability and measurable business impact.

Appendix

Appendix I:
Respondent Profiles

1. Brand Sectors

The sample is dominated by **consumer goods (35%)**, meaning results are strongly shaped by fast-moving, brand-driven industries. Additional significant groups include **banking/insurance (12%)** and **industry/transport/energy/business services (11%)**. Smaller clusters such as **health & wellness (6%)**, **internet/telecom/tech (6%)**, and **culture/media/leisure (4%)** add sectoral diversity. The **13% "other sector"** category indicates a wide spread of niche industries.

2. Role In The Company

Insights mainly reflect the perspective of **marketing and communication leaders (63%)**, supported by a substantial share of **senior executives (32%)**. Only **3%** come from product/project roles, and **0%** from operations, procurement, or finance—explaining the strong emphasis on strategic value, partnership, and creativity rather than cost-control or operational topics.

3. Geographic Distribution

The dataset is multi-regional but uneven: **Greece (19%)**, **Romania (11%)**, **Sweden (9%)**, **Iceland (9%)**, **Portugal (8%)**, **Poland (7%)**, and **Ireland (6%)** form the core respondent base, reflecting strong engagement from Southern, Eastern, and Northern Europe. A secondary layer (Belgium, Italy, Cyprus, Hungary, Bulgaria, Netherlands, Slovakia) adds further diversity. Western European markets (France, Germany, UK, Spain) appear only at **1% each**, with many smaller countries unrepresented.

Appendix II:
Key Ingredients For A Strong Client–Agency Relationship

Correlation between the three ingredient levels:

Level	Nature of expectations	Key recurring terms	Interpretation
Ingredient 1: **Foundations**	Values and attitude	*trust, transparency, understanding, partnership*	The relationship is first and foremost built on trust, listening, and mutual respect.
Ingredient 2: **Functioning**	Daily collaboration	*communication, adaptability, teamwork, proactivity, flexibility*	Reflects the day-to-day mechanics of collaboration, considered essential for efficiency and trust.
Ingredient 3: **Added value**	Vision and innovation	*creativity, strategy, innovation, challenge, insight*	The third pillar is the ability to inspire, innovate, and drive brand growth.

The relationship thus evolves from a relational foundation (1) to operational collaboration (2) to strategic and inspirational partnership (3).

Appendix III:
Qualities/Actions Expected From Agencies

Six key expectation themes:

Theme	Frequency	Core keywords	Key insight
1. Proactivity & Initiative	Very high (~40%)	*proactivity, initiative, challenge, anticipation, 'go the extra mile'*	Clients want agencies to lead, not follow — anticipating needs, suggesting new ideas, and pushing boundaries rather than waiting for briefs.
2. Strategic Thinking & Business Understanding	High (~30%)	*strategic thinking, brand knowledge, business acumen, ROI, insight*	Expectation for agencies to act as advisors with strong understanding of market dynamics, consumers, and brand positioning.
3. Creativity & Innovation	High (~25%)	*creativity, innovation, originality, curiosity, excellence*	Creativity must be aligned with strategy and deliver measurable impact — not creativity for its own sake.
4. Communication & Collaboration	Medium (~20%)	*communication, listening, partnership, openness, teamwork*	Clients value clarity, responsiveness, and transparency, aiming for "one shared mission" rather than supplier–client distance.
5. Reliability & Professionalism	Medium (~18%)	*reliability, honesty, consistency, accountability, timeliness*	Agencies are expected to maintain discipline, rigor, and ethical professionalism, especially in complex multi-market contexts.
6. Adaptability & Agility	Emerging (~15%)	*flexibility, speed, responsiveness, problem-solving*	Clients expect agility — the ability to pivot quickly, manage feedback, and adapt to new technologies, formats, and constraints.

Dominant Lexical Fields

- Positive/action-oriented vocabulary: proactivity, creativity, innovation, insight, challenge, clarity, partnership, transparency, accountability, collaboration.
- Recurrent emotional undertones: trust, honesty, commitment, reliability — suggesting the desire for confidence and stability amid a fast-moving environment.
- Negatively implied needs: lack of initiative, slow response, over-creative or disconnected ideas, inconsistency, poor follow-up.

Clients want **fewer surprises, more precision, and continuous improvement**.

Three Layers of Expectation

Layer	Description	Example behaviours expected
Foundation: Professional Trust	Deliver reliably, communicate transparently, respect commitments	*'Honesty, organisation, clarity, no overpromising.'*
Operational: Proactive Collaboration	Anticipate needs, solve problems fast, ensure alignment	*'Immediate support and quick reaction,' 'proactive, clear communication.'*
Strategic: Vision & Creativity	Bring insight, innovation, and forward thinking	*'Challenge us,' 'keep us up to date with new technologies,' 'creativity aligned with strategy.'*

Appendix IV: What Is Wanted From The Teams Running The Account Vs. What Is Expected Of The Agency

Main semantic dimensions (team-level expectations):

Axis	Approx. weight	Dominant keywords	Key insight
1. Proactivity & Ownership	~40%	*proactivity, initiative, anticipation, 'take care of our brand like it's theirs,' accountability*	Clients expect the team to lead daily operations, anticipate needs, and act with full ownership. This is the most cited dimension.
2. Business & Brand Understanding	~30%	*understanding, expertise, category knowledge, brand affinity, insight*	Teams should show strategic intelligence: knowing the brand deeply, the market context, and the client's internal challenges.
3. Communication & Responsiveness	~28%	*clarity, timeliness, feedback, transparency, 'pick up the phone,' collaboration*	The team's ability to communicate clearly and quickly — both internally and with the client — is seen as the backbone of trust.
4. Professionalism & Organisation	~25%	*reliability, follow-up, consistency, process, attention to detail*	Clients value structured, disciplined work: project management, control of details, deadlines, and quality assurance.
5. Creativity & Added Value	~20%	*creativity, innovation, challenge, originality, 'surprise me'*	While still important, creativity is expected to be practical and contextualised, integrated into problem-solving rather than conceptual.
6. Attitude & Engagement	~18%	*humility, trust, friendliness, teamwork, 'as passionate as we are,' service mindset*	Clients want teams that are human, approachable, positive, and fully engaged — more 'partners' than 'suppliers.'

(Percentages overlap since many responses mix several dimensions.)

Linguistic And Tonal Insights

Operational, respectful, but assertive — clients speak from direct experience of daily collaboration.

Words like *quick, reliable, trust, accountability, ownership,* and *clarity* dominate.

Lexical Field Comparison

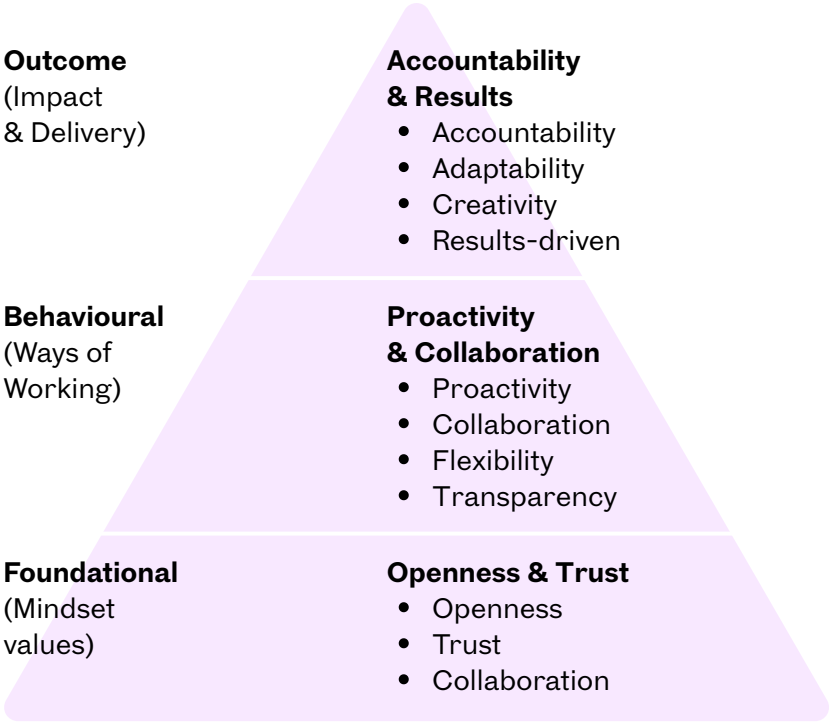
Compared to the 'agency' question (which emphasised *strategy*, *innovation*, and *foresight*), this corpus features:

- Fewer abstract nouns *(vision, purpose, leadership)*.
- More verbs of action *(deliver, respond, manage, anticipate, communicate)*.
- Stronger emotional nuance of *trust*, *empathy*, *frustration when unavailable*, and *desire for reliability*.

Comparison With The 'Agency' Question

Dimension	'Agency' focus	'Team' focus	Key difference
Strategic role	Vision, thought leadership, innovation	*Strategic understanding applied to execution*	*Clients now expect translation of strategy into action.*
Creativity	Inspirational, bold, differentiating	*Applied, relevant, context-driven*	*Creativity should solve problems, not decorate.*
Proactivity	Conceptual — propose new directions	*Operational — anticipate issues, communicate updates*	*Shift from idea generation to situation management.*
Collaboration	Partnership at leadership level	*Hands-on teamwork, shared accountability*	*Closer, more tactical cooperation expected.*
Trust	Built through values and ethics	*Built through consistency and reliability*	*Emotional trust → practical trust.*
Tone	Visionary, aspirational	*Concrete, managerial*	*'Think with us' → 'Work with us, daily.'*

Appendix V: The Culture Clients Want To Instil In The Agencies They Work With



Hierarchical Reading By Column

1/ Foundational Values (~35%)

- Dominant themes: *trust, openness, creativity, collaboration, passion, innovation, empathy, professionalism, curiosity*
- Semantic field: This first layer represents **mindset and ethics** — the human qualities clients want to 'feel' first.

Agencies should embody *integrity, transparency, passion,* and *curiosity*. Clients want partners who are emotionally intelligent, engaged, and forward-thinking, not passive executors. Examples: *'Openness, challenging us and coming with fresh ideas,' 'Trust, professionalism, accountability,' 'Creativity and innovation'*

Role: Defines the **identity** and **tone** of the relationship.

2/ Operational Conduct (~33%)

- Dominant themes: *proactivity, collaboration, flexibility, transparency, strategy, empathy, reliability, agility*
- Semantic field: This second layer describes **how the agency behaves daily** — its working rhythm and relational style.

Clients emphasise *responsiveness, anticipation,* and *shared ownership*. The agency should operate as **an extension of the client's team**, with initiative, constructive feedback, and genuine partnership. Examples: *'Proactivity, strategic vision, honest communication,' 'Partner, open-minded and thinking partner,' 'Team players, empathy, responsibility'*

Role: Defines the **operational trust and flow of collaboration**.

3/ Output and Impact (~32%)

- Dominant themes: *trust, accountability, adaptability, creativity, results-driven, transparency, innovation, attention to detail*
- Semantic field: The final layer captures the **outcomes and tangible experience** clients want from their collaboration.

Reliable delivery, strategic insight, agility, and measurable creativity. Clients expect **rigorous execution** combined with **strategic creativity** that drives results. Examples: *'Results-driven," "innovation," "expertise,' 'communication,' 'credibility.'*

Role: Defines the **performance and credibility** of the agency partnership.

Thematic Clusters Across the Dataset

Core Theme	Frequency	Keywords	Underlying Expectation
Trust & Integrity	Very high	*trust, transparency, honesty, respect, reliability*	Build a foundation of confidence and ethical behavior
Proactivity & Agility	High	*proactivity, initiative, flexibility, responsiveness*	Anticipate needs and act fast, not reactively
Creativity & Innovation	High	*creativity, innovation, curiosity, challenge, open-minded*	Continuously push for fresh, relevant ideas
Collaboration & Partnership	Medium-high	*collaboration, empathy, teamwork, communication*	Work 'with' not 'for' — shared goals and ownership
Strategic Thinking	Medium	*strategy, business acumen, foresight, alignment*	Combine creativity with clear business rationale
Accountability & Results	Medium	*results-driven, excellence, professionalism, reliability*	Deliver measurable, high-quality outcomes
Human Values	Emerging	*passion, care, empathy, joy, humility*	Clients want motivated, human partners, not bureaucratic vendors

Evolution Across The Three Columns (Ranked Depth Of Expectation)

Layer	Focus	Client Expectation	Example Keywords
Foundational (Identity)	Mindset & culture	*Authenticity, openness, creativity*	openness, curiosity, passion
Behavioral (Execution)	Working dynamics	*Partnership, collaboration, empathy*	proactivity, communication, flexibility
Outcome (Impact)	Performance & delivery	*Accountability, innovation, results*	trust, reliability, results-driven

Key Differentiations

(Compared With *'What Qualities Or Actions Do You Expect From Your Agency?'*)

Dimension	This question ('3 words culture')	Previous question ('actions & qualities')	Key difference
Nature	Aspirational / identity-based	Functional / behavioural	From 'how they act' to 'who they are'
Tone	Emotional, value-driven	Pragmatic, operational	Stronger focus on culture & attitude
Keywords	openness, passion, creativity, trust	Proactivity, strategy, accountability	More human and inspirational vocabulary
Focus	Team mindset, collaboration spirit	Delivery, performance, partnership process	This one defines the cultural DNA rather than the operational contract
Expectation	'We want them to think and feel like us'	'We want them to deliver well and challenge us'	Desire for shared purpose and values

Appendix VI:
Key Areas The Agency Of The Future Should Invest In

Dataset shows highly consistent patterns across respondents. Three investment pillars emerge as dominant, while others receive more moderate importance.

1. **Technological Know-How (incl. AI)** — highest priority *(consistently scoring 4–5)*. Respondents overwhelmingly see **technology mastery** as the critical investment area. Tech expertise is no longer optional; it is the backbone of future competitiveness. Agencies need to invest in technology talent, platforms, and AI integration end-to-end.

2. **Creative Excellence** — core, non-negotiable investment *(strong 4–5 scores).* Despite technological acceleration, creativity remains a foundational differentiator. Creative excellence is not being replaced by AI; it is being **augmented** by it. Investment should reinforce hybrid creative models.

3. **Product & Service Development** — strong momentum *(frequent 4s and 5s).* Respondents expect agencies to innovate their offering rather than just optimise processes. Investment should focus on **building new, market-relevant products**, not only refining existing ones.

4. **Consultancy Skills** — rising but uneven expectation *(mixed 3–5, with many 4s).* A calibrated approach is needed: consulting for strategic clients, lighter advisory for others.

5. **Process Management** — important but less differentiating *(stable 3–4 across responses).* Process excellence is not a source of competitive advantage—just a requirement.

6. **Market Intelligence** — secondary but necessary *(generally 3–4)*

7. **Cost-Reduction Initiatives** — lowest priority

Areas Agencies Should Primarily Invest In (Open Answers)

AI and automation clearly dominate as the leading new investment priorities. At the same time, clients insist on **strong human skills**, particularly creativity, strategic thinking, and people development.

Data, measurement, and **ROI frameworks** are considered essential capabilities. Creativity is expected to evolve toward innovative, technology-enhanced formats. **Cultural** and **global consumer understanding** emerge as critical differentiators. Agencies are expected to reinforce their **strategic consulting strength**.

Operational agility and lighter structures are viewed as necessary for future competitiveness. Increased collaboration—with clients and across agencies—is a recurring expectation. Overall, respondents envision **an agency model blending AI excellence, cultural intelligence, and human creativity within a more agile strategic framework**.

Across all three response columns, the dataset shows clear convergence on seven major investment priorities. These themes complement — and often deepen — the priorities identified in the structured Future Invest question.

1. **AI, Automation & Advanced Technology** — the most dominant theme. References include: *AI technology, AI creative, automation tools, AI integration, advanced analytics, hybrid AI, AI-based research, predictive analytics, personalisation engines*. Agencies must invest in AI-enabled capabilities across the entire value chain: research, insights, content, optimisation, and personalisation. Respondents insist **AI should enhance, not replace, creativity**.

2. **Talent Development & Human Capabilities** — a strong recurring priority. Mentions include: *talent, people expertise, 'brilliant brand strategists', coaching, mentoring, staff development, creative upskilling, growth mindset, soft skills*. Clients expect agencies to invest heavily in human capital: leadership, strategic thinking, creativity, and emotional intelligence. **Technology must be balanced with people development**.

3. **Data Intelligence, Measurement & ROI** — high frequency and high importance. Terms include: *business intelligence, data engineering, ROI analysis, KPIs, data systems, measurement frameworks, analytics, 'accountability for business KPIs'*. There is explicit pressure for agencies to build **credible measurement capabilities** that link marketing work to business outcomes.

4. **Creativity 2.0** — innovation, storytelling & new creative methods. Typical notes: *creative innovation, dynamic creative adaptation, storytelling, cross-media synergies, innovative creativity, "new ideas", creative automation.* Creativity must evolve toward modular formats, AI-enhanced ideation, format innovation, adaptive, real-time creativity. The expectation is **more originality, not more volume**.

5. **Cultural & Consumer Understanding** — emerging but distinct theme. References include: *cultural insights, local culture, cultural radar, cross-cultural consulting, global market scanning, media consumption safaris.* Agencies must invest in **cultural intelligence** and new approaches to understanding consumers beyond traditional research.

6. **Strategy, Consulting & Business Acumen** — frequently mentioned. Items include: *strategic consulting capabilities, business understanding, account management with strategic vision, cross-cultural innovation consulting.* Agencies must strengthen their **strategic advisory role**, helping clients navigate complexity and business transformation.

7. **Operations, Processes & Structural Reinvention** — repeated across responses. Mentions include: *project management, workflow, omnichannel experience, integrated lighter structures, 'agile and faster models'*. Clients expect agencies to **rethink their operating systems** — more agile, collaborative, integrated internally and with other partners, simplified, less bureaucratic.

Appendix VII:
Best Contractual Model

The dataset shows respondent selections across 5 categories:

- Project-based
- By campaign
- Annual basis
- Long-term partnership (multi-year)
- Other (open comments)

A. Strong Preference for Long-Term Partnership Models: The majority of ratings are 4s and 5s for long-term partnerships, making this the most consistently high-scoring option. The data reveals a clear need for multi-year strategic relationships, not transactional engagement.

B. Project-Based Agreements Also Score Strongly: Project-based contracting shows many 4s and 5s, indicating that project-based is a strong complementary model, especially for innovation, pilots, or specialised needs.

C. Campaign-Based Contracts Are Moderately Relevant: Campaign-based agreements receive mostly 3s and 4s, making it a useful, but not the preferred primary model.

D. Annual Contracting Generates Mixed Signals: Annual basis shows a blend of 3s and 4s, with fewer 5s. Annual agreements are functional, but not 'best practice' for most respondents.

E. Open-Ended 'Other' Answers Reinforce a Hybrid Model: The qualitative responses are particularly rich and indicate a clear pattern: clients want flexible long-term partnerships, not rigid contracts.

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