



# WHAT WE LEARNED

## Quick Summary!

The S2 Research Marketing Decision Makers & Marketing Firm Relationships Survey dove deep into several important facets of the client and marketing agency relationship. The study engaged with more than 350 marketing decision maker individuals at companies that have worked with marketing firms in the past, ranging across various industries and company size, with questions pertaining to agency satisfaction and the role of marketing firms moving forward.

Below is a quick overview of the highlights from this study's findings.



Marketing firm clients ranked digital marketing, market research, direct marketing and copywriting/design as the most important tactics for their marketing.



Nearly every client expects their marketing firm to conduct market research as part of the work they do on their account.



Those with final marketing decision say anticipated more involvement from their marketing firms over the next year compared to those who only have influence on marketing decisions.



The majority of respondents expect marketing firms to regularly conduct market research on their account, with projects taking place monthly to quarterly at least.



Though current and previous agency clients ranked their perceptions of marketing firms similar, those not currently working with a firm had lower perceptions of agencies in virtually every way.

*Hi there! I'm Matt!*

*As we come across interesting findings in this report, I'll be sure to point them out.*



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For more information on this survey and other deep-dive explorations into the marketing industry, be sure to visit [S2Research.com](https://S2Research.com)

# ABOUT THIS STUDY

The S2 Research Marketing Decision Makers & Marketing Firm Relationships Survey was designed to address the current need-states, pain-points and expectations of the client and marketing agency relationship.

A questionnaire was designed to capture the attitudes and opinions of marketing firms according to CMOs, Marketing Directors, Marketing Managers and similar in-house marketing roles who are most likely to interact with marketing firms (such as advertising agencies, public relations firms and digital marketing firms). The survey was then administered online in order to collect relevant information in order to paint a more accurate picture of how clients anticipate working with agencies in the future.

Topics explored in this study include:

- Client satisfaction levels of marketing agencies across various tactical areas.
- Client perceptions of marketing agencies in several types of common client/agency relationship roles.
- Client expectations on the role of market research within their agency's marketing process.
- Client anticipations of the role their agencies will play in marketing over the next one to two years.

Breakouts of various respondents types, including those currently working with and not working with an agency, are also included in order to provide a deeper look into different client types.

To view the original survey used in this study, visit [S2Research.com/MarketingSurvey](https://S2Research.com/MarketingSurvey).

## Special Thanks to VizualSurvey

Analysis for this survey was conducted in Tableau, using software and data-transformation processes developed and provided by VizualSurvey.

With VizualSurvey, marketers and researchers can automate complex survey data transformations and visualize their survey data easily with no IT or BI experience required.

VizualSurvey is for anyone who wants to quickly and easily analyze their survey data in a data visualization tool. The company transforms survey data so that it can easily connect to dashboard templates across several data visualization and analysis tools.

For more information and a free trial, visit [VizualSurvey.com](https://VizualSurvey.com).

# METHODOLOGY

The S2 Research Marketing Decision Makers & Marketing Firm Relationships Survey was administered through an online outreach program through LinkedIn. Individuals with decision making power over marketing activities and marketing firm relationships across a variety of industries, company-size and U.S. geographic locations were contacted, and their responses aggregated and included in the study.

From the period of June 14 through August 6, 2020, a total of 360 usable survey responses were collected. Based on a total est. 286k individuals working in advertising, promotions and marketing management roles ([according to the Bureau of Labor Statistics](#)), at the 95% confidence level this study has a margin of error of  $\pm 5\%$ . That means, if the survey were to be replicated again exactly the same with different respondents, 95 times out of 100 the responses would be within 5 points of the following results.

The survey results were then cleaned and checked for accuracy, and were analyzed using a variety of statistical tools, including Tableau data analysis and visualization software, as well as data transformation processes and dashboarding tools developed by VizualSurvey.

The study was designed to better understand the views of marketing, by both in-house and agency activities, according to those individuals who make marketing decisions and act as marketing firm client-contacts. Cross tabulation, data analysis and data visualization were then used to uncover aggregated insights from the data.

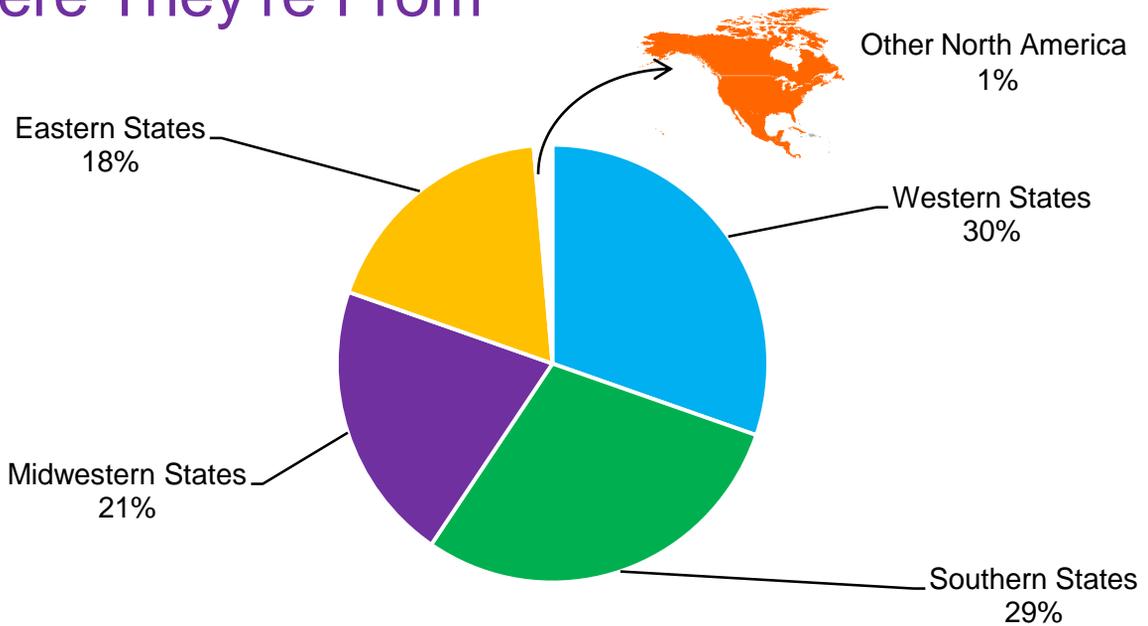
You can view additional results from this survey and other ongoing projects, at [S2Research.com/MarketingSurvey](https://S2Research.com/MarketingSurvey)



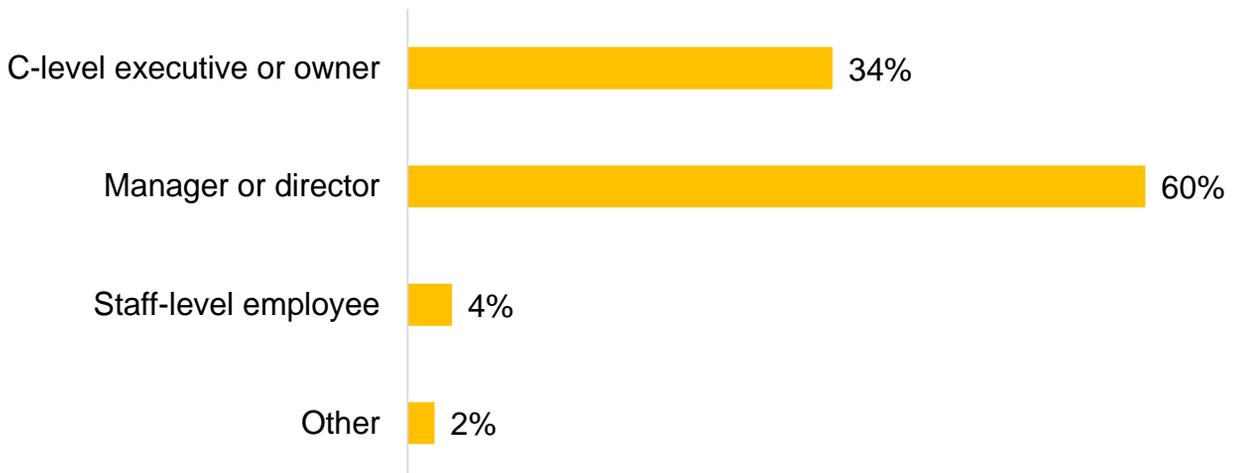
# ABOUT OUR AUDIENCE

Below is a quick overview of who participated in this study and when it took place. For additional questions about the audience involved in this study, please contact me at [matt@s2research.com](mailto:matt@s2research.com).

## Where They're From

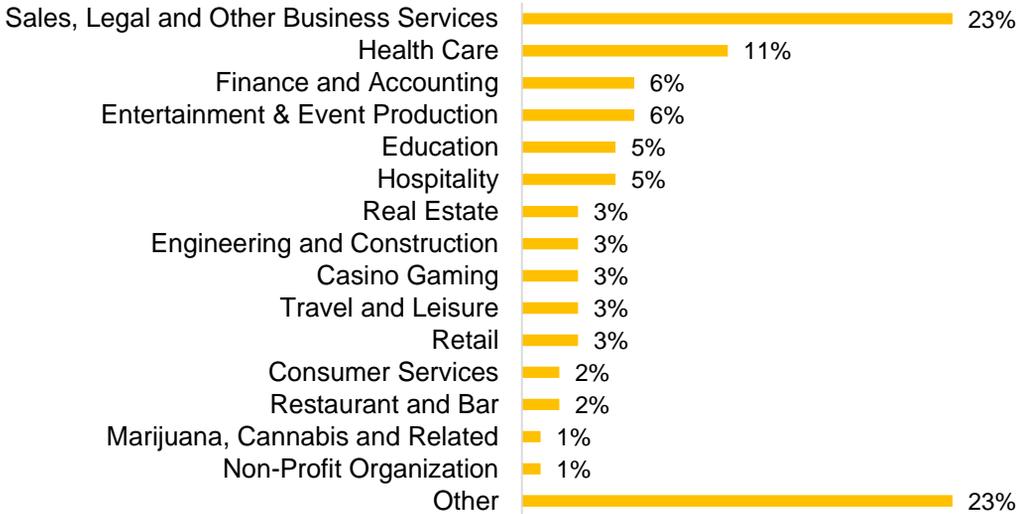


## Their Roles

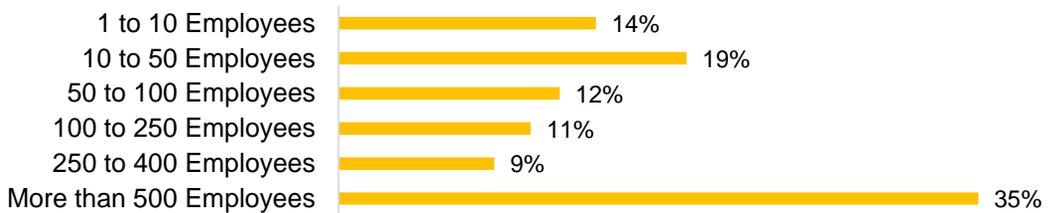


# ABOUT OUR AUDIENCE (Cont.)

## Their Industry

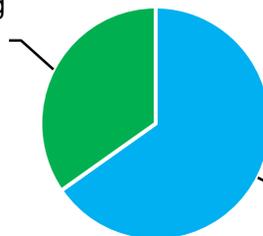


## Their Company Size



## Their Role in Marketing Decisions

Makes recommendations for marketing decisions only.  
35%



Makes final marketing decisions.  
65%

*Note: respondents who stated they are not involved in marketing decision making were excluded from this report.*

# PART I

## CLIENTS AND AGENCIES

The results of this survey were analyzed to find trends, commonalities and key insights about the relationship between in-house marketing decision makers and their marketing firms. The first section of this report details the findings from that survey among those individuals who qualified as having a role in the marketing decision making process.

Highlights from this section are below.



Marketing firm clients ranked digital marketing, market research, direct marketing and copywriting/design as the most important tactics for their marketing.



The majority of in-house marketing decision makers have worked with a marketing firm in the past, and more than half are currently working with one now. When working with agencies, they most often outsource digital marketing, copywriting/design, public relations and media buying to their respective firms.



Clients are most satisfied with their agency's work in copywriting/design, digital marketing and market research capabilities. They're least satisfied with agencies for media planning and buying.



In the eyes of current and previous agency clients, the greatest asset marketing firms deliver to their is their ability to develop creative marketing ideas. Their least satisfying trait, meanwhile, is their price.



Nearly every client expects their marketing firm to conduct market research as part of the work they do on their account, preferably at a frequency of monthly to quarterly.

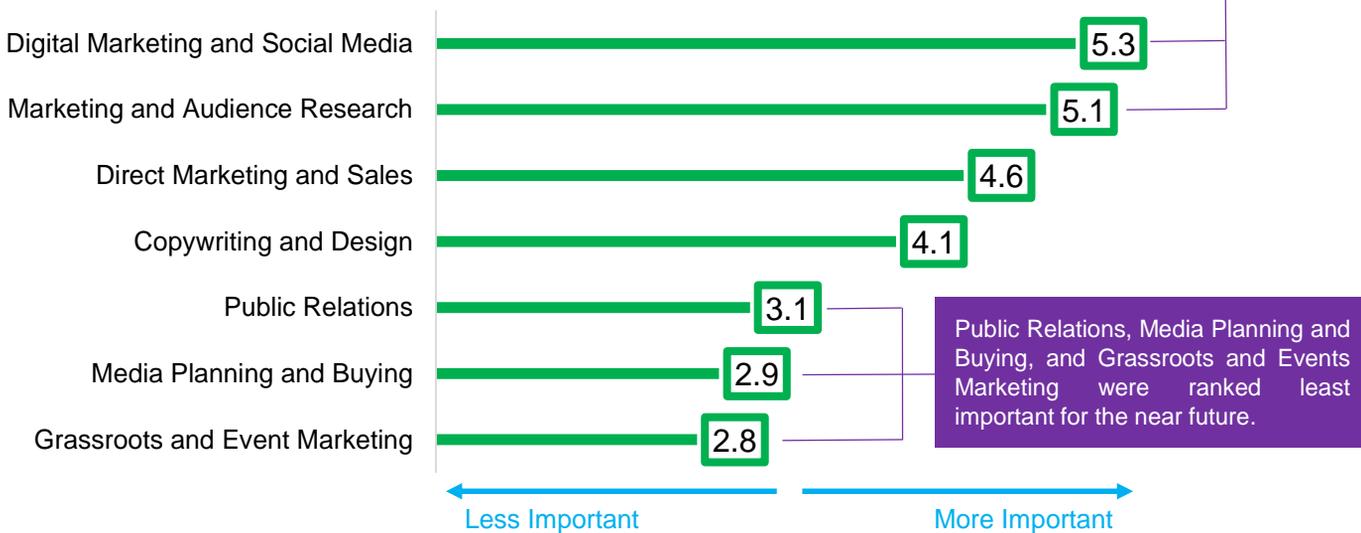
# PART I

## CLIENTS AND AGENCIES

### Perceived Importance of Marketing Tactics

Respondents were asked to rank how **important** they perceived seven common marketing tactics would be in their ideal marketing strategy for the near future.

On average, agency clients ranked both Digital Marketing and Social Media and Marketing and Audience Research as the most important tactics in which to focus their marketing efforts moving forward.



‘Digital Marketing and Social Media’ and ‘Market and Audience Research’ were ranked, on average, as the most important marketing tactics by marketing decision makers. ‘Direct Marketing and Sales’ came in slightly behind, with ‘Copywriting and Design’ coming in at roughly of middle-importance for respondents overall.

‘Grassroots and Event Marketing’ came in as the least-important marketing tactic overall, likely due to changes in the world of in-person meetings and events as a result of the Coronavirus. ‘Media Planning and Buying’ and ‘Public Relations,’ meanwhile, also ranked as relatively low in importance for future marketing according to the respondent base.

# PART I

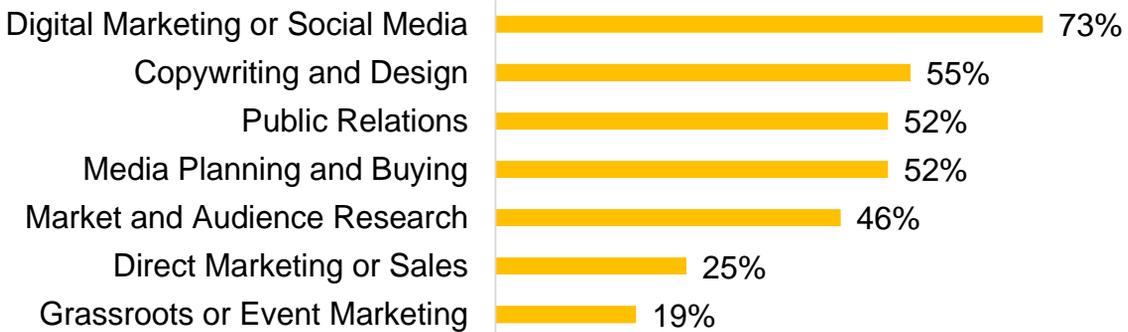
## CLIENTS AND AGENCIES

### Marketing Firm Relationships

More than four in five respondents said their company had worked with a marketing firm or agency in the past. However, as more marketing teams continue to bring work in-house, only about three in five respondents stated their company is currently working with a marketing firm or agency at the moment.



### Outsourced Marketing Services



*Interesting! Half the respondents outsourced PR and Media to an agency, even though they listed PR and Media as 2 of the 3 least important marketing tactics on the previous page!*



Nearly three in four respondents said their company had outsourced 'Digital Marketing or Social Media' to an agency in the past, far-and-away the most common marketing service outsources. About half of respondents had also used agencies for 'Copywriting and Design,' 'Public Relations,' 'Media Planning and Buying' and 'Market and Audience Research' as well.

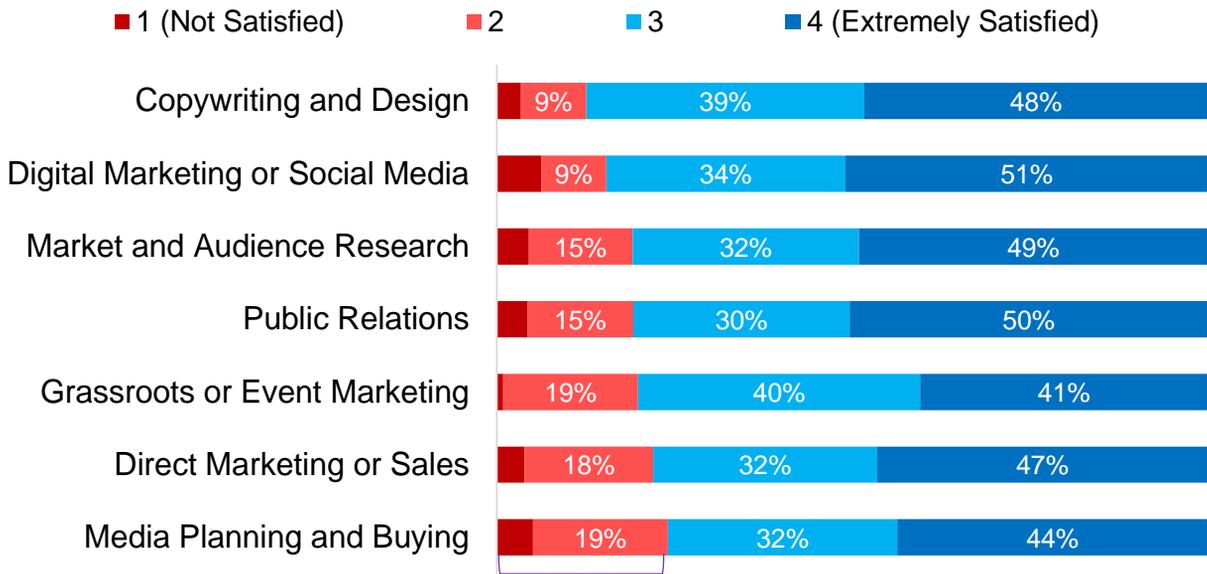
# PART I

## CLIENTS AND AGENCIES

### Marketing Firm Satisfaction

Respondents were asked to rate their satisfaction with their current or most recent agency regarding the firm’s ability to deliver quality work in the service lines that had been outsourced to them.

Overall, clients were most satisfied by their former or current agencies in their ability to deliver quality Copywriting and Design work, followed closely by their Digital Marketing or Social Media marketing efforts.



Of all marketing tactics outsourced to agencies, Media Planning and Buying was the area in which clients were least satisfied

The areas in which marketing firms delivered the highest levels of satisfaction, according to clients, was in ‘Copywriting and Design’ and ‘Digital Marketing or Social Media.’ Clients also expressed high-levels of satisfaction when working with agencies in the areas of ‘Market and Audience Research’ and ‘Public Relations.’

As we saw on the last page, more than half of respondents had worked with an agency for ‘Media Planning and Buying’ in the past. About a quarter of those individuals, however, said they were not satisfied with their agency’s media planning and buying capabilities, the lowest satisfaction score among the entire outsourced marketing gamut.

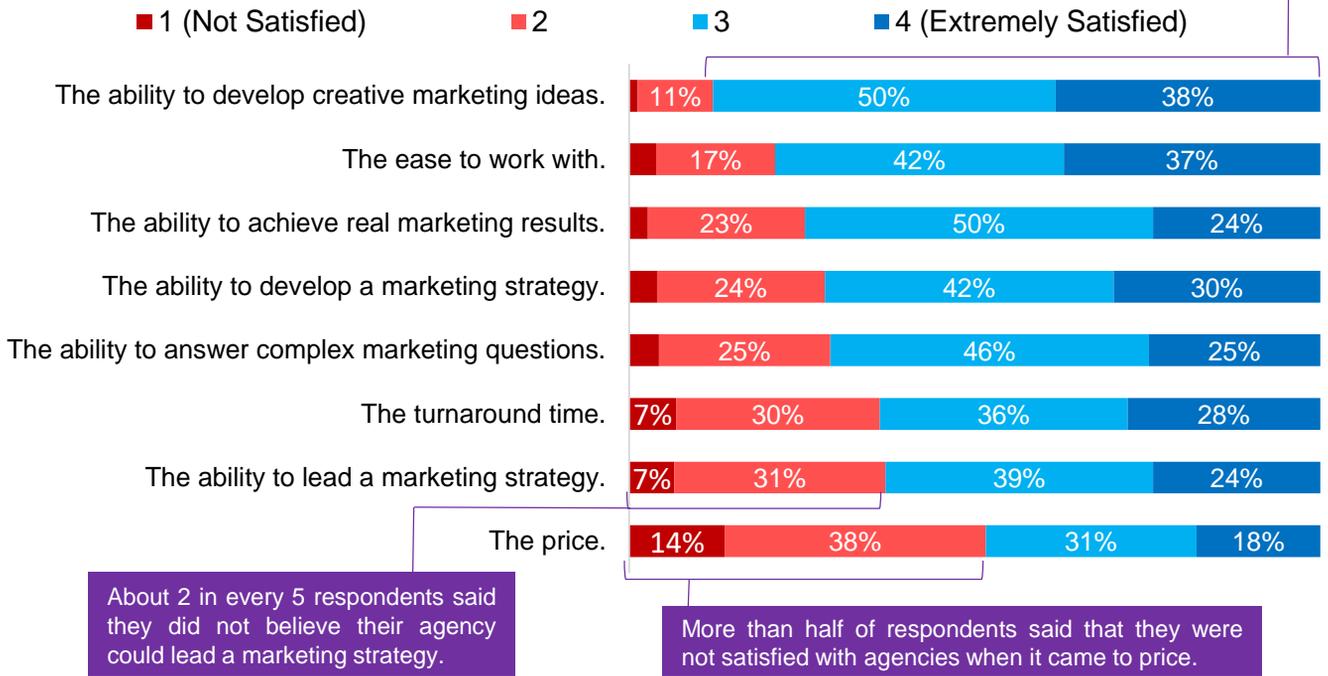
# PART I

## CLIENTS AND AGENCIES

### Marketing Firm Perceptions

Respondents were asked to rate their perceptions of expected agency satisfaction in several marketing-partnership related categories. This included items like the ability to lead strategy and partner on a strategy overseen by the in-house team, as well as more logistical factors like price and turnaround time.

Above all other factors, clients believed most that agencies were strong in developing and delivering creative marketing ideas.



Clients most believed that agencies were strong in delivering creative marketing ideas, and that they were easy to work with.

The majority of respondents also believed that marketing firms were able to achieve marketing results and develop strategy. The ability of firms to lead that strategy, though, was called into question by almost 40 percent of respondents.

More than a third of clients also said the turnaround time of their agency was less than satisfactory, and more than half said they were not satisfied with the price they were paying (note, price was the only factor measured where the majority of clients were not mostly satisfied).

# PART I

## CLIENTS AND AGENCIES

### Market Research and Marketing Firms

Nearly every respondent in the study stated that they felt it was important for the marketing firms that worked with their company to conduct market research as part of the marketing work they are doing.

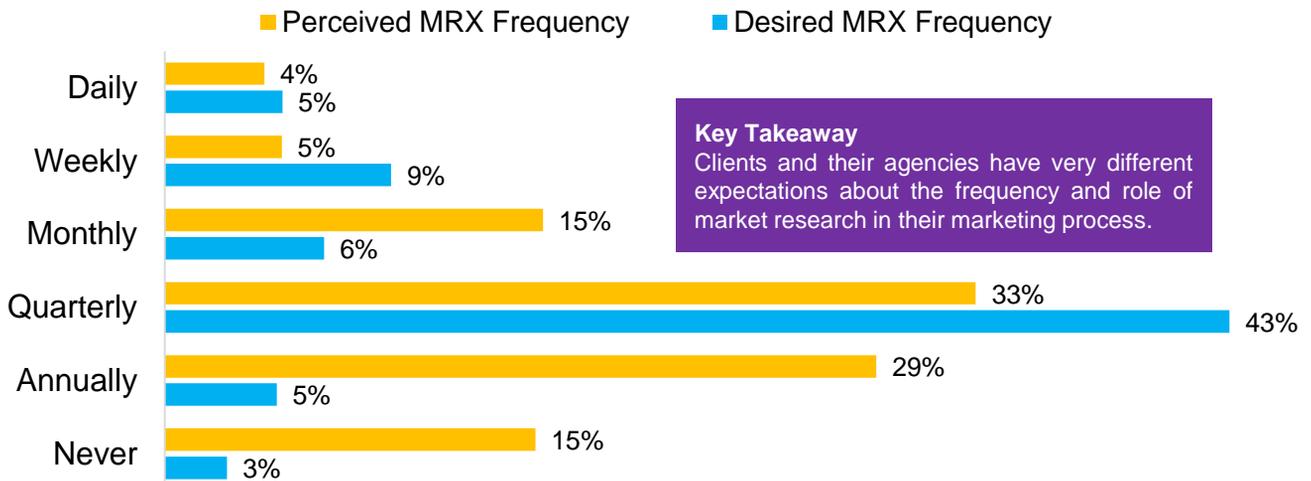


*96% of respondents expect their marketing firm to conduct market research!*



### Market Research Frequency

Respondents were also asked to gauge how often they believed marketing firms conducted market research on their account (Orange), and how often they actually preferred their marketing firms to conduct market research (Blue).



**Key Takeaway**  
Clients and their agencies have very different expectations about the frequency and role of market research in their marketing process.

Nearly every client involved in this study expected their marketing firm to conduct regular market research, with about half expecting research to be conducted monthly or quarterly.

A full 15 percent, though, didn't believe their marketing firm conducted any market research at all, and the majority, meanwhile, believed their firms only conducted research on a quarterly basis or less.

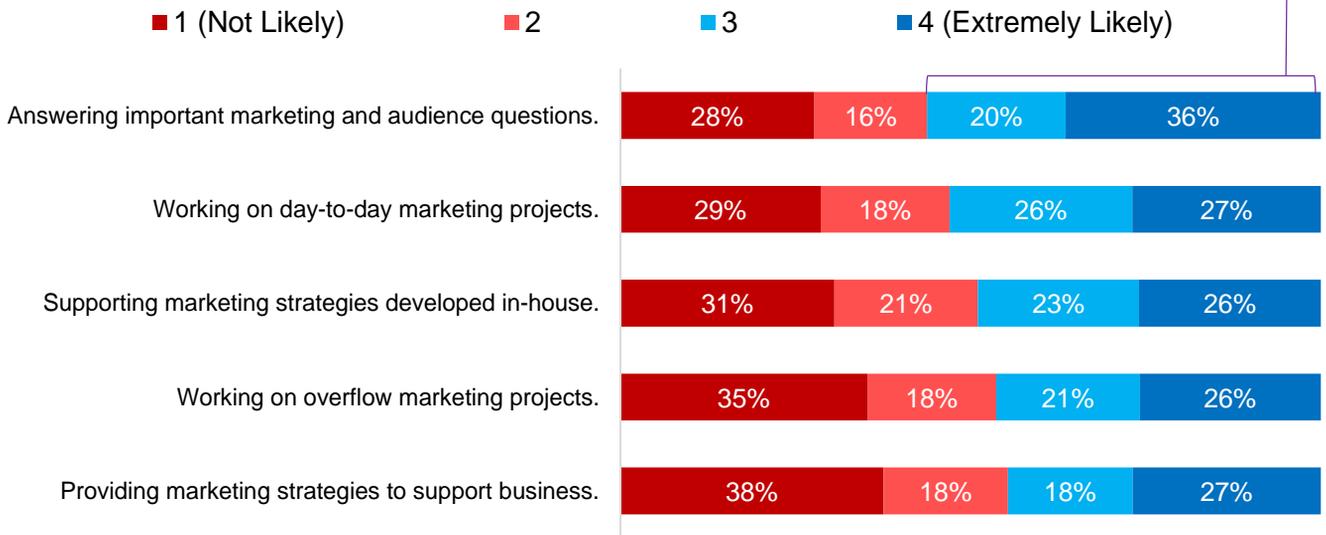
# PART I

## CLIENTS AND AGENCIES

### Marketing Firm Reliance Moving Forward

As the world begins to figure out how to move forward following the impacts of the Coronavirus, in-house marketing decision makers were asked to rate how likely they were to utilize marketing agencies in various roles over the next 12 to 24 months.

Moving forward, clients believe they will rely on marketing firms most in the areas of answering important questions related to marketing and audiences.



The majority of clients felt they would not be utilizing marketing firms to provide or develop long-term business marketing strategies, nor would they be sending overflow marketing work to their firms.

Well more than half of respondents, meanwhile, believed they would most lean on marketing firms for answering important marketing and audience questions, as well as working on day-to-day marketing projects and supporting in-house marketing strategies.



# PART II

## DECISION MAKERS AND INFLUENCERS

As part of this study, both marketing decision makers (those who have final say in spending, project approval, hiring and firing marketing firms) and marketing decision influencers (those who work with the marketing decision maker but do not have final say in the aforementioned decisions). The following pages include a comparison of the results of these two groups.

Highlights from this section are below.



Both decision makers and influencers scored marketing firms relatively equally in terms of perceptions. The majority of each group felt that agencies were creative, easy to work with, and developed strong marketing strategies.



Clients, both those who made final decisions and those who had influence on those decisions only, agreed that agencies had room for improvement in terms of price and turnaround time.



Decisions makers felt much stronger that their agencies would be aiding their in-house marketing team in support of their strategy than influencers felt about the topics.



Overall, those with final say in marketing decisions anticipated much more involvement from their marketing firms in the near future than those who only influenced those decisions.

# PART II

## DECISION MAKERS AND INFLUENCERS

### Marketing Firm Satisfaction

Both marketing decision makers and influencers feel relatively similarly about their current and most recent agency relationships. Based on a percentage of possible perfect satisfaction score, both the average decision maker and influencer gave their agency roughly a 'C' for overall marketing tactic execution.



### Marketing Firm Perceptions \*\*



Likewise, both groups felt relatively similar to each other in virtually every aspect of the client-agency relationship. Influencers did feel slightly more than decision makers that agencies could develop creative marketing ideas and also achieve marketing results, though, suggesting that decision makers require more proof from their agencies than those not directly involved in the final decision.

\* An average of all marketing tactic satisfactions (see p. 10) was calculated.  
\*\* Scores based on percent of percent score (4) achieved.

# PART II

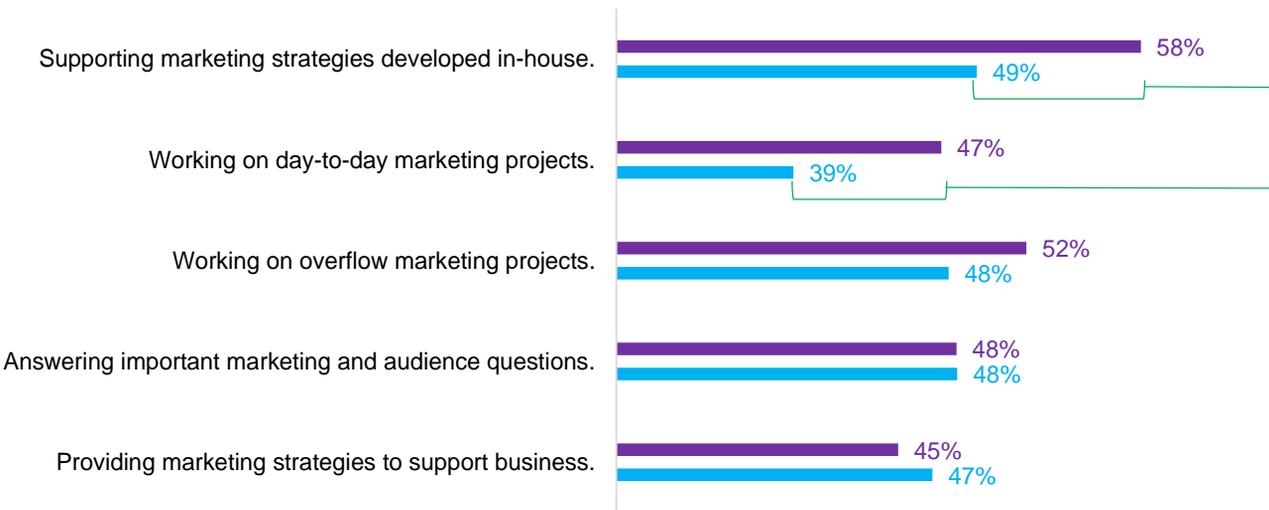
## DECISION MAKERS AND INFLUENCERS

### Marketing Firm Reliance Moving Forward\*\*

Despite similarities in how both groups currently view their agency relationships, decision makers and influencers have some drastically different outlooks on the future of how marketing teams will rely on their marketing firm partnerships while adapting to the changing world over the next one to two years.

Decision Makers expected to rely on marketing firms for supporting strategies developed in-house and completing day-to-day marketing projects much more than influencers.

■ Decision Makers      ■ Influencers



Those who had final say in marketing decisions expected to rely on marketing firms for supporting strategies developed by the in-house marketing team much more than influencers, suggesting a disconnect between the two audiences and their views of marketing agencies.

The same disconnect can be seen in how much more marketing decision makers expect their marketing firms to handle day-to-day marketing projects and overflow projects compared to influencers.



Meanwhile, about half of both audience groups expected they would rely on marketing firms to answer important marketing and audience questions, demonstrating opportunity with about one in two marketing clients for future service opportunities.

\*\* Scores based on percent of perfect score (4) achieved.

# PART III

## CURRENT AND PREVIOUS CLIENTS

While a full 4 in 5 respondents had previously worked with an agency in the past, only 3 in 5 were currently working with one. The difference between current and previous-only agency clients is compared on the following pages.

Highlights from this section are below.



Current and previous agency clients have similar views on the importance of digital marketing, market research and direct marketing, but have vastly different views on the importance of nearly all other marketing tactics.



Though current and previous agency clients ranked their perceptions of marketing firms similar, those not currently working with a firm had largely lower positive perception scores in every single category measured.



Nearly every type of respondent, both those with and without a current marketing firm relationship, expected marketing firms to conduct market research as part of the work they conducted for their clients.



The majority of both groups expected any marketing firms they work with to conduct market research on their account on a regular ongoing basis, with research initiatives taking place quarterly at least.

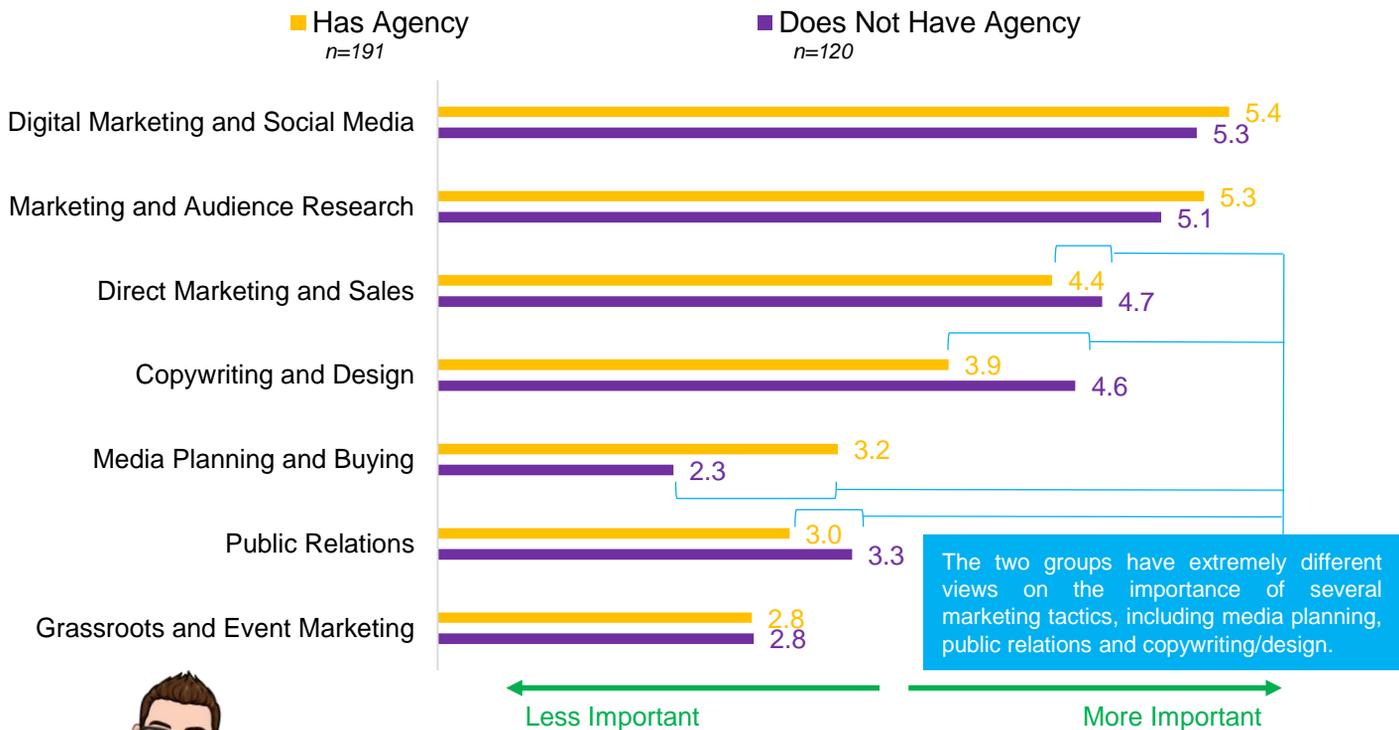
# PART III

## CURRENT AND PREVIOUS CLIENTS

### Perceived Importance of Marketing Tactics

Those marketing teams who are currently working with a marketing firm and those not currently working with a marketing firm have some commonalities and also extreme differences in their perceived importance of various marketing tactics within the marketing mix.

Both groups believe that digital marketing and social media, as well as market and audience research, are the most important areas of focus for their marketing, followed by direct marketing and sales.



*Wow – even though there were differences overall, both groups still ranked digital marketing, market research and direct marketing as the most important tactics for their marketing!*

The importance of media planning and buying, however, was viewed as tremendously more important by those currently working with an agency v. those not. Meanwhile, the importance of great copywriting and design was deemed much more important by those not working with an agency compared to those who are.

# PART III

## CURRENT AND PREVIOUS CLIENTS

### Marketing Firm Perceptions \*\*

Overall, those not currently working with a marketing firm have extremely lower perceptions of agencies compared to those currently working with one.

Current marketing firm clients believed agencies were best at developing creative marketing ideas and achieving real marketing results, and also that they are easy to work with. In addition, they believed agencies were relatively capable of developing strong marketing strategies and using research to answer complex marketing questions.



While non-agency clients had about the same beliefs of agencies, in terms of ranking based on average perceived satisfaction score, they also believed they would receive less satisfaction in each of these categories overall compared to how satisfied current agency clients actually are. Those marketing teams not working with a marketing firm are also most concerned they will not be satisfied by the price of their agency, nor the turnaround time or their ability to lead marketing strategy.

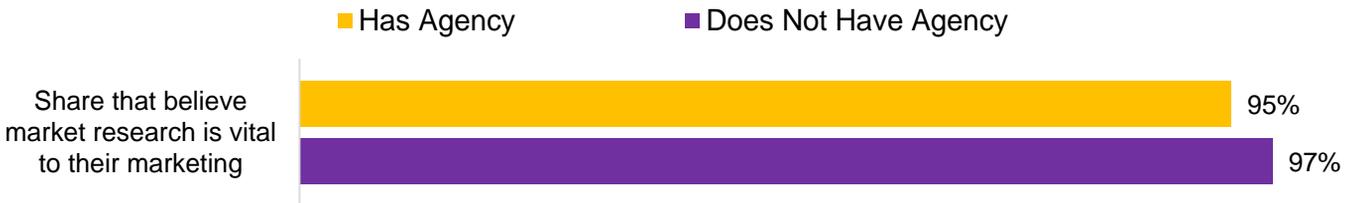
\*\* Scores based on percent of perfect score (4) achieved.

# PART III

## CURRENT AND PREVIOUS CLIENTS

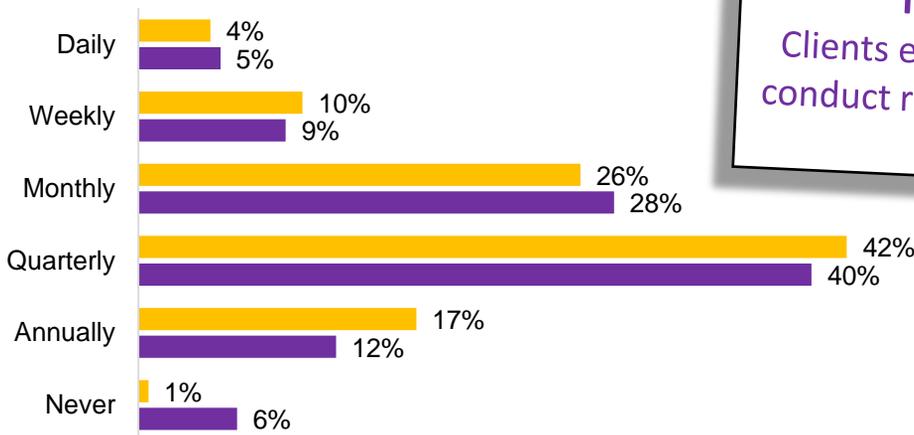
### Market Research and Marketing Firms

Nearly every respondent from both groups believed that market research was important to their marketing.



### Desired Agency Market Research Frequency

The majority of both agency and non-agency clients alike expected marketing firms to conduct market research as part of the work they do for their clients at least several times per year. Two in five members of each audience expected research to be conducted at least quarterly, while about a quarter of each group expected monthly market research to be conducted by their marketing firms.



**THE DATA IS IN!**  
Clients expect their agencies to conduct regular market research!



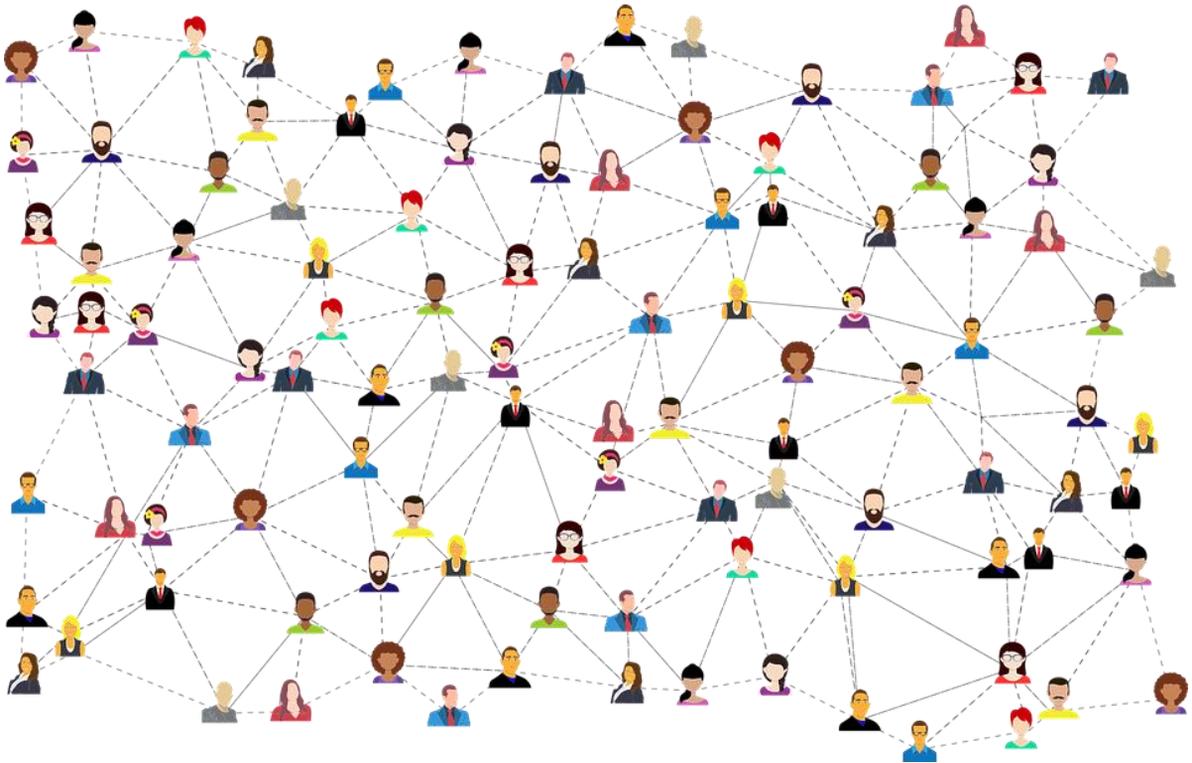
Only 1 percent of current agency clients said they were comfortable with their marketing firm not conducting any market research at all, demonstrating a huge expectation of agencies from their clients.

Add Research to your marketing team with the right Market Research Partner. Schedule a **FREE** consultation today!

# SURVEYS FROM S2 RESEARCH

Surveys have always been the backbone of market research. It's because great researchers know that a well-designed survey can unlock the most pressing mental mysteries about your marketing audience.

Hi, I'm Matt, the Market Research Guy. I specialize in developing surveys that directly address your marketing goals. Whether you're looking to uncover insights for your campaign strategy or just develop a really interesting piece of engaging content marketing, you'll receive a deep-dive analysis that helps answer your major marketing questions and get you the results you need.



Struggling to determine the best way to find and reach the people who matter most to your marketing? Not sure how to build a study that gets you exactly where you need to be? That's where I can help.

From participant acquisition strategy to audience panel selection, and from standard multiple choice to advanced Likert scales and gamification techniques, I help bring together experience and innovation to help you achieve your market research goals.

# LEARN MORE ABOUT S2 RESEARCH



[Matt@S2Research.com](mailto:Matt@S2Research.com)

[Connect on LinkedIn](#)

Hi, I'm Matt Seltzer. I partner with marketing teams to add Market Research to their services!

Right now, more brand and agency marketers are tapping into market research insights than ever before. But, if your team doesn't yet have access to an in-house research team, incorporating those insights might seem more perilous than profitable.

**That's why I started S2 Research - to help more marketers add research back into their marketing.**

I've spent my career conducting great market research and managing incredible marketing strategies. In that time, I've come to recognize that marketers and market researchers struggle to communicate with each other. Fluent in both languages, I'm now serving as an effective translator between the two worlds.

If your agency doesn't yet have a dedicated market research team, let's connect!

[Click here to schedule a meeting with me!](#)

**Interested in exploring what a Market Research Partner can bring to your marketing team?  
Schedule a FREE Consultation today!**



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