

Worldwide Partners, Inc.
2009 State of the Agency
Partner Agency CEO Research Results
(January 19, 2009)

	Global	Asia Pacific	EMEA	Latin America	North America
No. of respondents	83	13	24	12	34

Since the last WPI Partner Agency CEO survey in August of 2008, would you say the economy in your region is better, worse or the same today?

	Global	Asia Pacific	EMEA	Latin America	North America
Better	2%	0%	4%	0%	0%
Same	11%	8%	4%	25%	15%
Worse	87%	92%	92%	75%	85%

Has the economy in your region officially been designated as “in recession”?

	Global	Asia Pacific	EMEA	Latin America	North America
Yes	67%	54%	70%	25%	76%
No	33%	46%	30%	75%	24%

If a recession has not been declared, does it feel like your market is in recession, even if technical criteria have not been met to declare a recession?

	Global	Asia Pacific	EMEA	Latin America	North America
Yes	64%	50%	71%	89%	62%
No	36%	50%	29%	11%	38%

As 2009 begins, do you feel the economy in your market or region will be better, worse or the same in six months?

	Global	Asia Pacific	EMEA	Latin America	North America
Better	5%	0%	4%	8%	3%
Same	17%	8%	87%	25%	19%
Worse	78%	92%	9%	67%	78%

If you are currently in a recession, when do you think your economy will emerge from it?

	Global	Asia Pacific	EMEA	Latin America	North America
6 months	5%	10%	0%	0%	6%
12 months	47%	60%	57%	30%	42%
18 months	35%	20%	35%	40%	39%
More than 18 months	13%	10%	9%	30%	13%

Will the incoming new leadership in the United States have a positive, negative or no impact on the economy of your region?

	Global	Asia Pacific	EMEA	Latin America	North America
Positive	68%	77%	61%	75%	64%
Negative	1%	0%	0%	0%	3%
No impact	31%	23%	39%	25%	33%

Has the global financial crisis impacted your agency's revenues severely, marginally, not at all or stimulated revenue?

	Global	Asia Pacific	EMEA	Latin America	North America
Severely impacted	26%	46%	30%	8%	27%
Marginally impacted	61%	38%	52%	92%	58%
No impact	12%	15%	13%	0%	15%
Stimulated revenue	1%	0%	4%	0%	0%

Did your clients end up increasing, reducing, or maintaining their spending levels in the second half of 2008?

	Global	Asia Pacific	EMEA	Latin America	North America
Increase	1%	8%	0%	0%	0%
Reduce	52%	62%	61%	17%	58%
Maintain	46%	31%	39%	83%	42%

Were client spending levels for the year increased, reduced or on budget for 2008 on an annual basis?

	Global	Asia Pacific	EMEA	Latin America	North America
Increased	6%	15%	0%	9%	6%
Reduced	49%	62%	65%	18%	48%
On Budget	45%	23%	35%	73%	45%

In 2009, have your clients provided you with an annual budget or are they operating on a pay as you go basis?

	Global	Asia Pacific	EMEA	Latin America	North America
Annual Budget	38%	31%	26%	27%	56%
Pay as you go	52%	46%	70%	73%	34%
Other	10%	23%	4%	0%	9%

This year, are you forecasting that annual client spending will increase, stay the same or decline when compared with 2008?

	Global	Asia Pacific	EMEA	Latin America	North America
Increase	5%	8%	9%	0%	3%
Stay the same	25%	8%	9%	50%	30%
Decline	70%	85%	83%	50%	67%

If you said clients advertising budgets will be reduced in 2009, what percent do you think the decrease will be?

	Global	Asia Pacific	EMEA	Latin America	North America
5%	3%	0%	0%	0%	8%
10%	13%	9%	14%	22%	8%
15%	28%	36%	5%	44%	42%
20%	40%	45%	62%	11%	29%
More than 20%	15%	9%	19%	22%	12%

Did you increase, reduce or maintain full-time staff levels at your agency at the end 2008 compared with the beginning for the year?

	Global	Asia Pacific	EMEA	Latin America	North America
Increase	16%	15%	26%	8%	9%
Reduce	36%	31%	30%	42%	42%
Maintain	48%	54%	43%	50%	48%

Are you forecasting your full-time staff levels will increase, decrease or remain constant in 2009?

	Global	Asia Pacific	EMEA	Latin America	North America
Increase	13%	8%	9%	8%	18%
Decrease	37%	23%	57%	25%	36%
Remain Constant	49%	69%	35%	67%	45%

In 2009, would you say your clients are more optimistic or less optimistic about their business climate than in 2008?

	Global	Asia Pacific	EMEA	Latin America	North America
More optimistic	5%	8%	0%	8%	6%
Less optimistic	95%	92%	100%	92%	94%

What areas of your business do you see growing in 2009?

	Global	Asia Pacific	EMEA	Latin America	North America
Traditional Print	1%	0%	0%	0%	3%
Radio and Television Advertising	1%	0%	0%	8%	0%
Direct Marketing	12%	15%	17%	25%	0%
Digital	49%	46%	57%	0%	62%
No Growth Areas	13%	15%	13%	33%	6%
Other	23%	23%	13%	33%	28%

Would you say that 50% or more of your revenues come from business-to-business advertising?

	Global	Asia Pacific	EMEA	Latin America	North America
Yes	31%	23%	30%	25%	33%
No	69%	77%	70%	75%	67%

If 50% or more of your revenue comes from business-to-business accounts, did your clients reduce, increase or maintain their budgets in 2008?

	Global	Asia Pacific	EMEA	Latin America	North America
Reduce	40%	100%	57%	0%	27%
Increase	12%	0%	0%	33%	9%
Maintain	48%	0%	43%	67%	64%

If 50% or more of your revenue is derived from business-to-business clients, are your clients forecasting increased, decreased or constant ad spending in 2009 compared to 2008?

	Global	Asia Pacific	EMEA	Latin America	North America
Increased	0%	0%	0%	0%	0%
Decreased	72%	100%	86%	67%	64%
Constant	28%	0%	14%	33%	36%

If you said clients advertising budgets will be reduced in 2009, what percentage do you think the decrease will be?

	Global	Asia Pacific	EMEA	Latin America	North America
5%	0%	0%	0%	0%	0%
10%	21%	0%	29%	0%	29%
15%	26%	67%	0%	50%	29%
20%	32%	33%	57%	0%	14%
More than 20%	21%	0%	14%	50%	29%

Please select the region that best describes your location.

North America	41%	
Latin America	15%	
Asia Pacific	16%	
EMEA	28%	