

Spanish advertisers double their investment in digital

In Spain, currently, an advertising company dedicates an average of 3.5% of its turnover (sales) to communication / marketing / advertising budget.



Source: © Pxabay [pexels](#) In Spain investment in digital already accounts for 46% of the budget and, of its different disciplines

This is according to the 23rd edition of Agency Scope in Spain.

The percentage has not changed in comparison to the previous edition, and is slightly higher than the 2014-2022 average (3.2%). The average investment ratio of nine markets analysed is 2.6%, and South Africa and India are the only ones that exceed 4%.

The study, which is carried out every two years, analyses advertiser relationships with the agencies they work with as well as the perception and image of agencies and other specialist marketing & communication agents in Spain.

The results obtained are also compared with previous editions of the study and with the 11 markets where it is carried out, with the aim of analysing the evolution of trends.



Agency Scope SA: Divulging what marketers really think

17 Mar 2023



More than 1,600 interviews

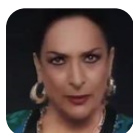
This is the only study of its kind carried out in the sector and its main value is to provide agencies that subscribe to it with key information to meet the current needs of their clients. The report gives them a unique tool to improve and offer new services that address current and future needs of marketers.

The fieldwork took place between the months of April and October 2022 and, on this occasion, more than 1,600 interviews were carried out - 833 with professionals who work in 590 different advertising companies, 389 with professionals from creative agencies, 392 from media agencies and 15 from media commercial managers.

Of those marketing managers interviewed, 63% work in Madrid, the majority are women (57%), around 43 years of age and have been working at their current company for almost eight years, of which seven have been in the same position.

The position with the highest representation in the sample is that of marketing director (33%). 50% work in foreign multinationals, 26% in Spanish multinationals and 24% in national companies.

Most of them are companies within the service sector (42%), followed everyday consumer goods (33%) and durable consumption (20%).



Creative agencies contribute to Spanish advertisers' business growth

14 Apr 2023



Digital investment doubled

Investment in Digital (46%) has almost doubled in the last eight years (24% in 2014) and is higher than the rest of the disciplines: ATL (34%) and BTL (20%). At a global level, we find that the countries where investment in Digital is highest are China (50%) and Mexico (48%).

Marketers analysed dedicate 52% of their budget to branding activity and 48% to performance marketing (52.0%).

However, some differences can be seen depending on the specific sector of the companies analysed: those of Mass Consumption invest more in branding (61%), while those of Durable Consumption and Services invest more in performance actions (51% and 53% respectively).

Amongst the different Digital disciplines, budget is largely allocated to Paid Media (36%), followed by Search Engines-SEO/SEM (27%), Social Media and Influencers (21%), Ecommerce/Marketplaces (78%) and Digital CRM (7%).

At an international level, Brazil is more committed to Paid Media than the rest of markets, Argentina is where investment in Social Media is highest and Spain leads investment in Search Engines. Globally, we see an increase of investments in Social Media and Influencers.



Scopen: Digital marketing in Brazil gets the chunk of the budget

17 Feb 2023



Working with almost 12 different agents

Regarding the different agents with which advertisers solve their communication, marketing and advertising needs, on average, each marketing manager in Spain works with almost 12 different agents: digital platforms (3.4) and advertising agencies (2.5) are the ones which collaborate the most with advertisers, followed by digital agencies, BTL agencies, media agencies, PR agencies and consultancies. In Brazil and China we find that the number of digital platforms with which advertisers work increases to over nine.

Already in 2020 we saw that, in Spain, there was no desire to integrate all communication services in the same agency (Advertising, BTL, Digital, Media...), as had been customary in previous editions and as occurs in several of the countries where the study takes place.

Currently, 78% of Spanish advertisers (72% in 2020) work with agencies by specialty, however, looking to the future, it is a smaller percentage (62%) who say they would like to continue working within this model.

Among the disciplines that advertisers consider key for their company, the five most mentioned, in the following order, are: Strategic Planning, Creativity, Digital Strategy, Research (market, media, consumer) and Media Planning.

It is interesting to observe how media agencies are improving their position as leading agencies in the relationship with the companies they work with.

In Spain, we already find up to nine media agencies within the top 30, thus demonstrating that they have sufficient capacity to accompany their clients' marketing-communication-advertising team in leadership, due to their strengths in Research, Strategic Planning, Digital Strategy, Media Planning and Buying.

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