

# What Clients Think

A report based on  
675 client interviews  
conducted on behalf  
of creative agencies.

IN ASSOCIATION WITH

dba

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to the  
light

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# INTRODUCTION



**Jonathan Kirk**  
Founder of  
Up to the Light

It's astonishing to think that this is our 10<sup>th</sup> 'What Clients Think' report. So much has changed over that period. 10 years ago topics such as AI, B Corp certification, Instagram, TikTok, influencers, programmatic marketing, ESG or sustainability, either hardly existed or were much lower down clients' priority lists. Over the last 10 years marketing has become more technical and data driven. Digital transformation has become a reality.

Since 2014, the 'What Clients Think' report has grown in size and influence. It has become the definitive annual snapshot of the client/agency relationship, eagerly anticipated by agencies not just in the UK but around the world. This year's report is based on 675 client interviews conducted on behalf of creative agencies, our highest ever number.

The report revisits some key issues, as well as exploring new areas not covered in previous reports. As in previous years, the report is divided into 3 sections. Firstly, 'Client World' looks at wider client pressures and concerns, over and above their immediate client/agency relationship. Secondly, 'Winning Clients' looks at agency new business activity, marketing content and pitching. Thirdly, 'Retaining & Growing Clients' covers client service and client development issues. In this 10th anniversary edition, we also map some of the main trends and changes over that period. These are weaved into each section.

What is sometimes not understood about the report is that every interview was paid for by individual agencies commissioning Up to the Light to provide an independent Client Survey for their agency. The interviews are with interested clients who are talking at length about their views on agencies and the relationship with their incumbent agency. They are giving comments in a spirit of constructive criticism. This is very different from more superficial online surveys that fail to capture the complexity of client/agency relationships.

Names of the individual agencies and clients involved are confidential. However, we can share some very revealing statistics when looking across all 675 interviews. As in previous years, it provides important pointers for how agencies can strengthen their client relationships and sharpen their approach.

## About the agencies

All the agencies commissioned Up to the Light to conduct a Client Survey with their key clients. The agencies cover multiple disciplines and range in size from 5 employees to over 100. The principal purpose was to monitor the health of their most important client/agency relationships.

### Specifically:

- Understand current perceptions of the agency’s strengths and weaknesses.
- Understand which boxes clients are putting them in, whether fairly or unfairly.
- Provide a better understanding of client needs and concerns.
- Identify client development opportunities.
- Highlight client service measures that can improve the relationship.
- Spot any problems early so that they can be dealt with proactively.
- Understand how they are compared to competitor agencies.
- Provide an assessment of client perceptions across areas such as creativity, value for money, ability to add value, proactivity, effective listening and commercial awareness.
- Understand how clients see the market more generally – trends and concerns.
- Assess levels of client loyalty.
- Understand client challenges and how these are likely to affect the client/agency relationship in the future.

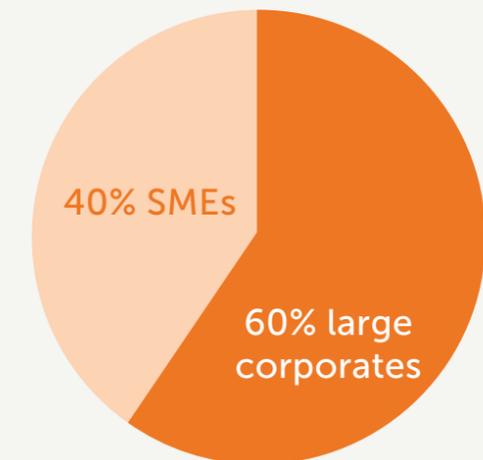
## About the clients

The clients range from Brand Manager level to Chief Executives and Board Directors of major organisations. All 675 clients have responsibility for buying creative services and have relationships with agencies, whether day to day or in an overseeing capacity. A very broad range of clients are represented – different industries, UK and international, business to business, business to consumer, not for profit.

### Different areas represented include:

- Food and drink manufacturers
- Financial services
- Pharmaceuticals
- Hi tech/software
- Mobile telecoms
- Government
- Higher education
- Healthcare
- Charities
- Automotive
- High street retail
- Supermarkets
- Professional services
- Sports organisations

The interviews were conducted with SMEs and large corporates. The rough split is as follows:



60% large corporates

40% SMEs (turnover of less than £25m, less than 250 employees)

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A unique  
spotlight on the  
client viewpoint.  
675 interviews  
that reveal what  
clients are really  
thinking.

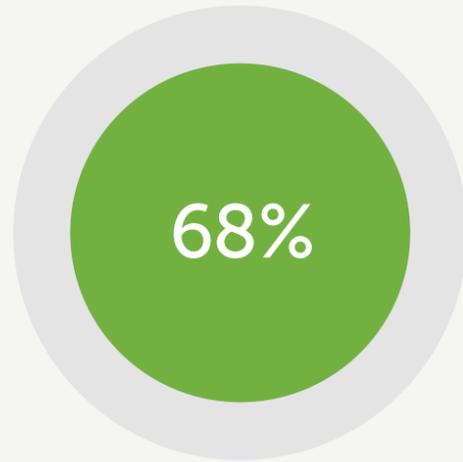
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# 1 Client World



# 1.1 Top challenges

What's keeping clients awake at night? Across all our interviews, these are the most mentioned broader challenges that clients are facing:



OF CLIENTS ARE FRUSTRATED THAT THEIR ORGANISATION MOVES TOO SLOWLY, GIVEN THE CHALLENGES BEING FACED



This is mainly a frustration around slow decision making and an organisational inability to respond quickly.



OF CLIENTS ARE CONCERNED ABOUT **CYBER SECURITY** AND WHETHER ENOUGH IS BEING DONE TO COUNTERACT THE THREAT



It has become more common for clients to reference recent attacks.



OF CLIENTS ARE CONCERNED ABOUT THE CHALLENGE OF LEGISLATIVE CHANGE



Examples include the changing regulatory environment in corporate reporting, or the forthcoming 2025 Data Act and its implications for rights of access to data.

# 1.1 Top challenges



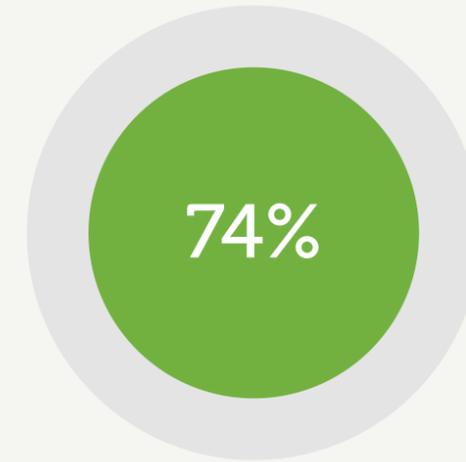
OF CLIENTS STATED THAT AI OFFERS **HUGE POTENTIAL** FOR BRANDS MARKETING

The most mentioned potential benefits were improved personalisation at scale, improved ROI and better predictability of purchase preferences.



OF CLIENTS STATED THAT THEIR USE OF **AI IN BRANDS** MARKETING WAS STILL AT AN 'EARLY STAGE'

Obstacles mentioned were a lack of in-house people with the appropriate skills and a lack of planning in terms of how AI fits into an overall strategy.



OF CLIENTS EXPECT AI TO HAVE A **DOWNWARD EFFECT** ON AGENCY COSTS OVER THE NEXT FEW YEARS

Clients are expecting agencies to use AI as a tool that can speed up creative options and processes.

# 1.1 Top challenges



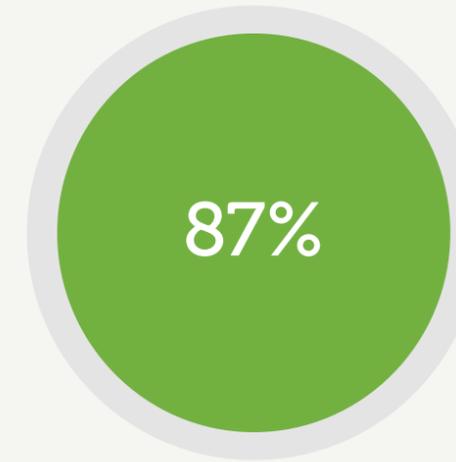
OF CLIENTS BELIEVE THAT DATA AND ANALYTICS IS AN AREA THAT CAN BE **IMPROVED UPON**

A slightly higher percentage than 2023 and proof that data is king in modern marketing. For instance, AI is only as good as the data it receives. Quality of data is a big concern.



OF CLIENTS CONSIDER THEMSELVES TO BE WORKING IN A **MORE PRESSURISED ENVIRONMENT THAN 5 YEARS AGO**

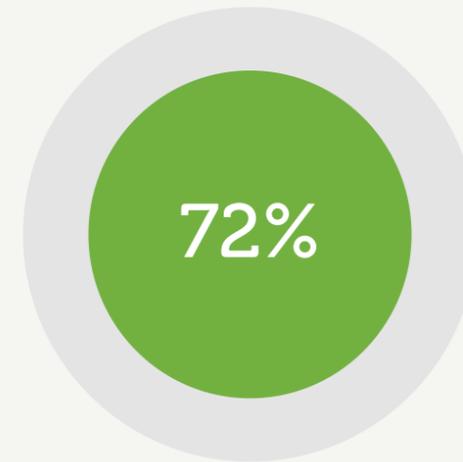
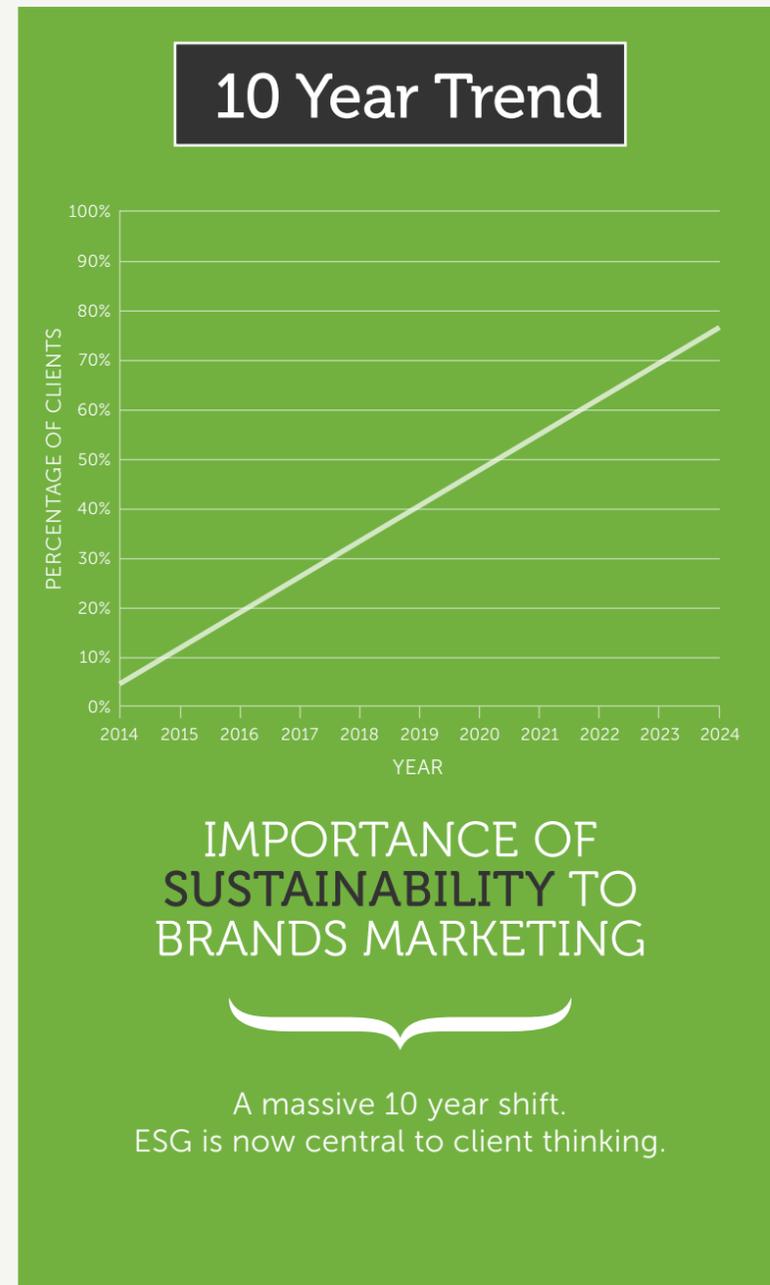
Smaller teams, budget constraints and generally having to do more with less, seems to be the order of the day.



OF CLIENTS AGREE THAT **SUSTAINABILITY IS A 'MUST' NOT A TREND OR SOMETHING THAT GETS LESS ATTENTION WHEN TIMES ARE TOUGH**

Sustainability is shifting to become more integral to clients' approaches, as opposed to a bolt on or the responsibility of a particular department/people.

# 1.1 Top challenges



OF CLIENTS STATED THAT ONE OF THEIR BIGGEST FEARS IS TO BE ACCUSED OF **GREENWASHING**

Clients are now very sensitive to this issue and are working harder than ever to pre-empt and guard against criticism.



OF CLIENTS BELIEVE THAT CURRENT LEVELS OF **ECONOMIC UNCERTAINTY** ARE HAMPERING THEIR ABILITY TO BOTH MOVE QUICKLY AND **PLAN AHEAD**

Inflation rates, soaring energy prices, conflicts in Europe and the Middle East were all repeatedly mentioned. A backdrop of uncertainty creates business unease and slows momentum. In many cases, it means that brands are struggling to keep up with changing customer mindsets because it's hard to implement change amid uncertainty.

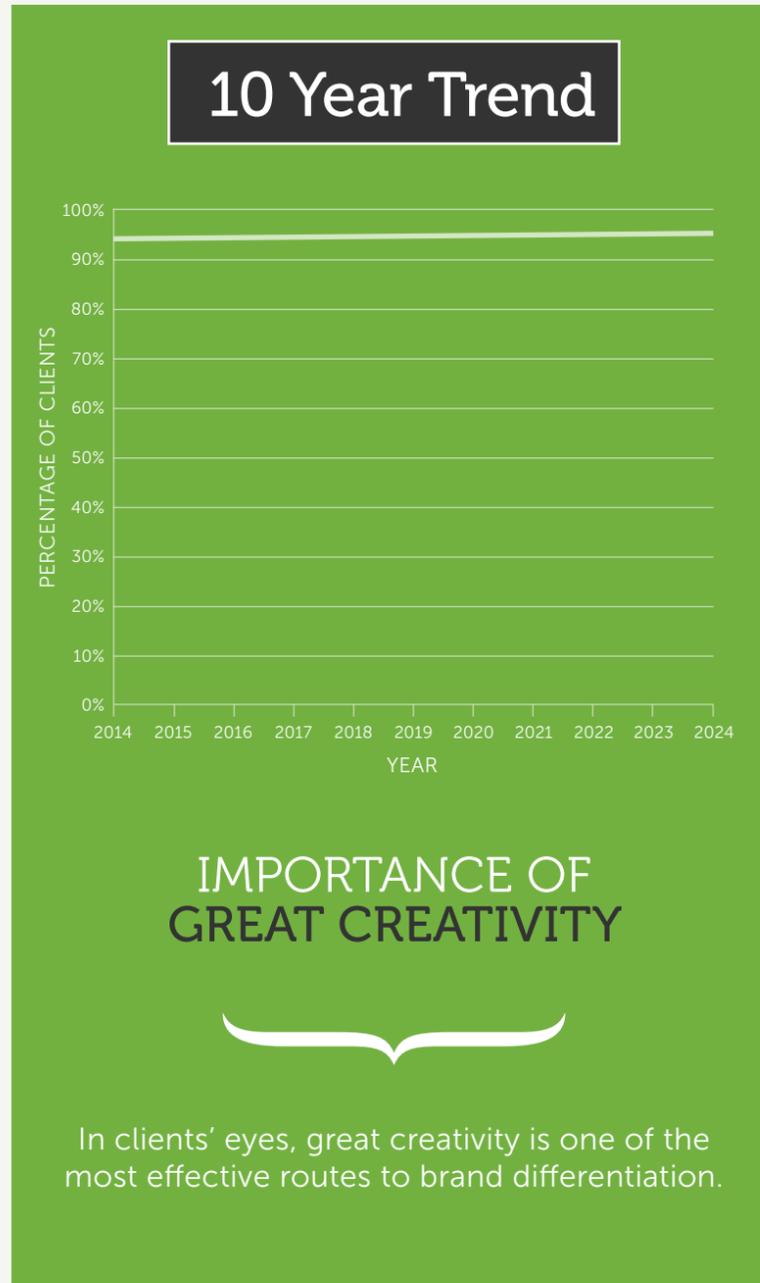
## 1.2 The role of creativity



OF CLIENTS AGREED THAT **GREAT CREATIVITY** HAS THE POWER TO MOVE A BRAND FORWARDS



A very similar percentage to 2023. There is general agreement that great creativity is a powerful driver of brand fortunes.



In clients' eyes, great creativity is one of the most effective routes to brand differentiation.

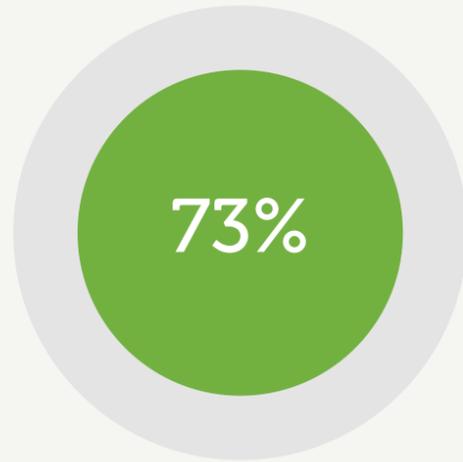


OF CLIENTS WOULD LIKE THEIR AGENCY TO **'PUSH BOUNDARIES'** MORE



These clients are saying that the creative work is good and solid, but they would love to see a next level – something disruptive, different, surprising. Some clients admit that they might not use it, but they'd still like to see it.

## 1.2 The role of creativity



OF CLIENTS STATED THAT **DESIGN EFFECTIVENESS IS DIFFICULT TO QUANTIFY**



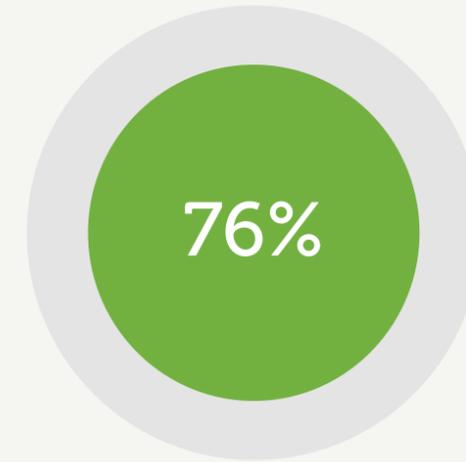
A very similar statistic to last year. Isolating the design component is problematic.



OF CLIENTS BELIEVE THAT **'CREATIVITY' IS NOT LIMITED TO THE CREATIVE DEPARTMENT WITHIN AGENCIES**



Creativity is not the sole preserve of the agency. For many clients, 'creativity' is just as likely to be generated through good analysis of data, insights gained from market research, or collaboration with influencers and creators. Some clients can also point to effective creative ideas originating from inside the marketing team, not the agency.

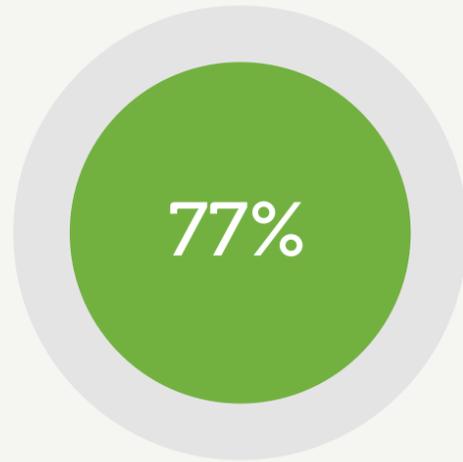


OF CLIENTS BELIEVE THAT **CREATIVITY HAS TO BE LINKED TO THE LONGER-TERM BRAND STRATEGY**



Short term creativity, when not linked to consistent brand building, is seen as ineffective.

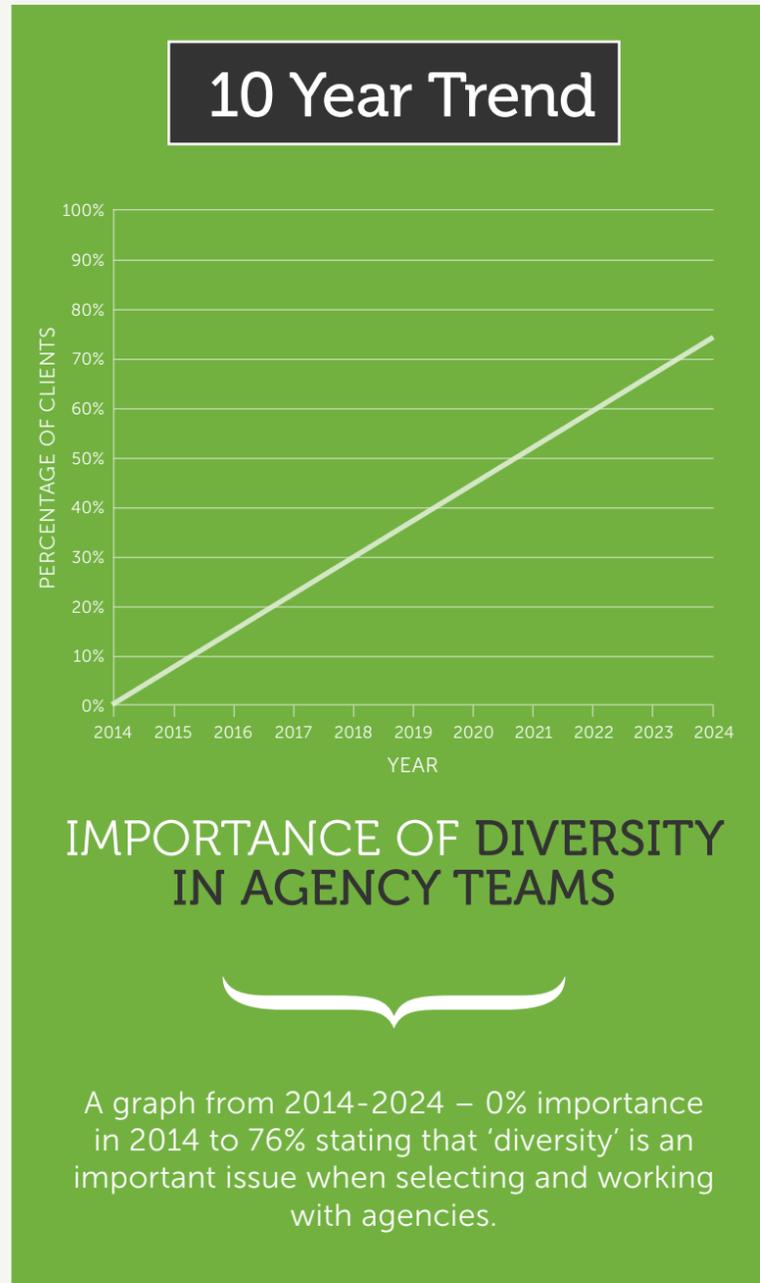
# 1.3 Agencies



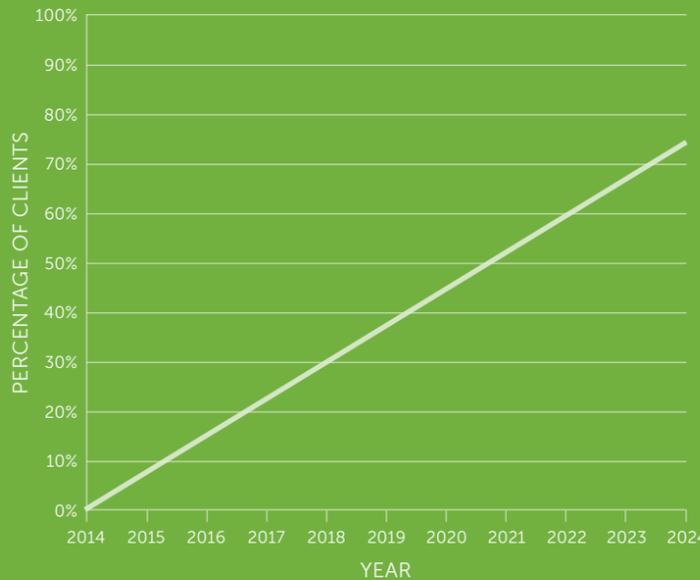
OF MARKETING DIRECTORS STATED THAT THEY **DO NOT HAVE ENOUGH TIME TO PROPERLY MONITOR COMPETITORS AND MARKET TRENDS**



They are increasingly expecting their agencies to play this role.



10 Year Trend



IMPORTANCE OF DIVERSITY IN AGENCY TEAMS

A graph from 2014-2024 – 0% importance in 2014 to 76% stating that 'diversity' is an important issue when selecting and working with agencies.



OF CLIENTS LIKE TO FEEL THAT THEIR BUSINESS IS **HIGHLY VALUED AND IMPORTANT TO THE AGENCY**



Clients are very sensitive to any indication that this is not necessarily the case.

## 1.3 Agencies

### DANGER SIGNALS

4 main signals that damage clients' perception that they are a valued and important client:

1

#### Drop in responsiveness

Things take longer than they used to – replies to emails and/or calls, follow up from meetings, turnaround of quotes, work delivered late, client having to chase.

2

#### Not enough senior level input

The client hasn't had a call or meeting with one of the agency leaders for a while. This can raise questions about whether there is enough strategic oversight and whether the agency's priorities are elsewhere.

3

#### Perception that the agency is growing and winning new clients

Most clients are pleased when their agency is growing and prospering, but not when it's coupled with a feeling that the agency is becoming stretched and client service is suffering. Agency faults can quickly be blamed on all the attention going into new clients at the expense of existing ones.

4

#### Lack of proactivity

This is usually seen as a marked drop off from the level of proactivity that existed at the start of the relationship. Have the enthusiasm and interest levels waned?

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# 1.3 Agencies



During the pandemic, agencies’ efforts to be flexible and accommodating on costs were appreciated by clients. Despite this, the long-term trend shows that client perceptions of value for money have declined. To a large extent, this is related to the increased budget pressures that clients are under.



## FACTORS AFFECTING VALUE FOR MONEY PERCEPTION

Clients are finding it more difficult to give an unqualified ‘Yes’ to the value for money question. Many clients are caveating their answer.

The most common caveats that affect perceptions of value for money:

- Not proactive enough. Lack of added value beyond the task in hand.
- A particular type of work is disproportionately expensive.
- Some tasks don’t need the gold standard approach and are in the ‘just get it done’ category.
- Misalignment on the scope of work and a disagreement about what is included and what is not.
- Lack of transparency about how long something really takes and who is working on it.
- Agency failing to communicate the value of what they do – senior management views the agency as too expensive.
- The entire client organisation is under more pressure to reduce costs, so clients feel duty bound to look at greater efficiencies in their relationships with agencies.

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43% of Marketing Directors would, ideally, like to be working with fewer agencies.

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2

Winning  
Clients



## 2.1 Opening the door

### A GREAT COLD NEW BUSINESS APPROACH – KEY INGREDIENTS

What makes a great cold new business approach? From 675 client interviews, these are the top mentioned factors:

1

#### An issue that strikes a chord

Not just a credentials-based approach, but leading with a strategic issue that the client may be facing. This could be sector specific or an issue that crosses markets, but it's something that the client is grappling with.

2

#### Show knowledge and immersion

Then the agency demonstrates that they're on the inside. They're immersed in the subject, understand the market and consumer landscape. The issue they're leading with is backed up by knowledge.

3

#### Relevant credentials

Examples of client stories and projects that back up the agency's case. These are the proof that the agency has been there and done it, but they are the support not the leading message.

4

#### One clear reason to meet

A clear answer to the client's question, 'Why should I spend an hour with this agency?' This is most effective when it is simple and clear. One reason to meet, not five.

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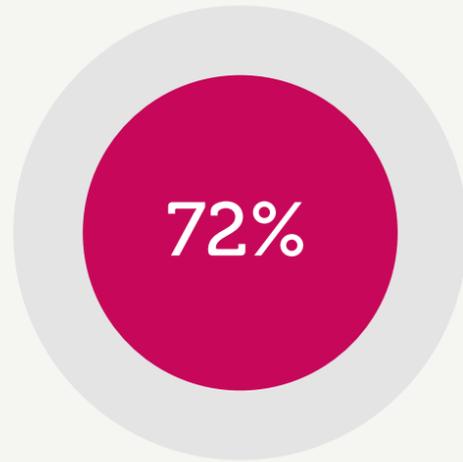
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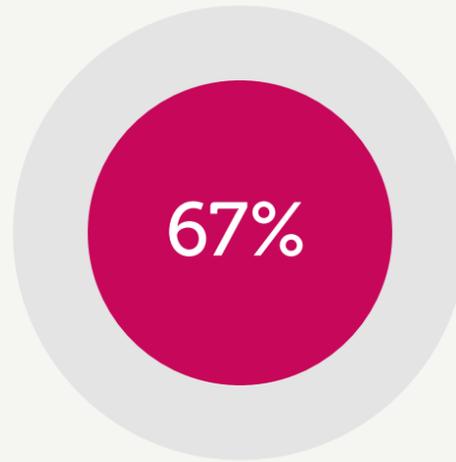
## 2.1 Opening the door



**OF CLIENTS APPOINT AN AGENCY AFTER A 1.5 YEAR LEAD TIME**



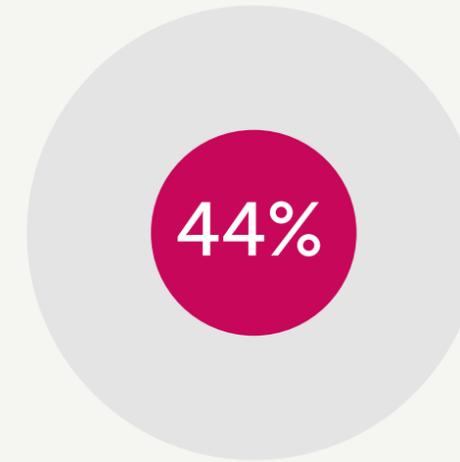
A reminder that new business is often about consistency and patience.



**OF CLIENTS BELIEVE THAT AGENCY NEW BUSINESS APPROACHES TEND TO FEEL GENERIC**



A round robin feel as opposed to carefully crafted, bespoke communications.



**OF CLIENTS STATED THAT AGENCY PROMOTIONAL ACTIVITY LACKS CONSISTENCY**



The newsletter that faded away or the event that was more of a one off than a series. Consistency is powerful and helps an agency to stand out.

## 2.1 Opening the door

### TOP 5 REASONS **NOT** TO USE A SMALL AGENCY

When clients are faced with that stark choice, smaller agency or bigger agency, which way should they go? It can often come down to reasons **NOT** to choose.

These are the factors most mentioned by clients:

<p><b>1</b></p> <p><b>Account management won't be strong enough</b></p> <p>Bigger budget, more complex projects require tight project management. Smaller agencies can be seen as less robust in their approach when compared to bigger agencies.</p>	<p><b>2</b></p> <p><b>Not enough capacity</b></p> <p>A smaller agency can easily become stretched. Will they have the resources to cope or will they become overwhelmed?</p>	<p><b>3</b></p> <p><b>Smaller talent pool</b></p> <p>Will a bigger agency provide a bigger pool of talent – different brains, more skills, more breadth? When thinking about pan-European and global work, a bigger agency is also more likely to have a team with different nationalities and cultures to draw upon.</p>	<p><b>4</b></p> <p><b>Lack of a network</b></p> <p>The smaller agency is usually limited to one site. Will that be a disadvantage versus a bigger agency that may have people on the ground in different countries? Will the smaller agency understand the cultural nuances?</p>	<p><b>5</b></p> <p><b>Bigger agency seems a safer choice</b></p> <p>Is choosing a smaller agency more of a leap of faith? Will the smaller agency still be in business 2 years from now? Will the Board be more reassured by a bigger agency?</p>
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<p><b>1</b></p> <p><b>Account management won't be strong enough</b></p> <p>Bigger budget, more complex projects require tight project management. Smaller agencies can be seen as less robust in their approach when compared to bigger agencies.</p>	<p><b>2</b></p> <p><b>Not enough capacity</b></p> <p>A smaller agency can easily become stretched. Will they have the resources to cope or will they become overwhelmed?</p>	<p><b>3</b></p> <p><b>Smaller talent pool</b></p> <p>Will a bigger agency provide a bigger pool of talent – different brains, more skills, more breadth? When thinking about pan-European and global work, a bigger agency is also more likely to have a team with different nationalities and cultures to draw upon.</p>	<p><b>4</b></p> <p><b>Lack of a network</b></p> <p>The smaller agency is usually limited to one site. Will that be a disadvantage versus a bigger agency that may have people on the ground in different countries? Will the smaller agency understand the cultural nuances?</p>	<p><b>5</b></p> <p><b>Bigger agency seems a safer choice</b></p> <p>Is choosing a smaller agency more of a leap of faith? Will the smaller agency still be in business 2 years from now? Will the Board be more reassured by a bigger agency?</p>
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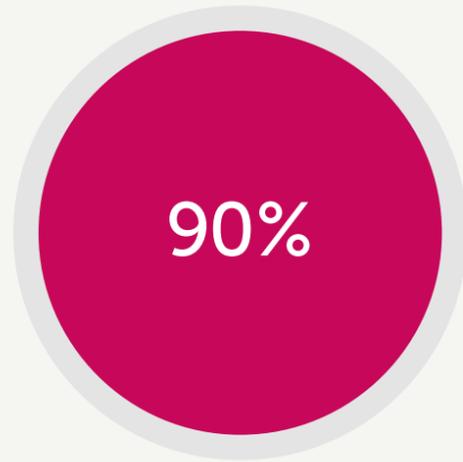
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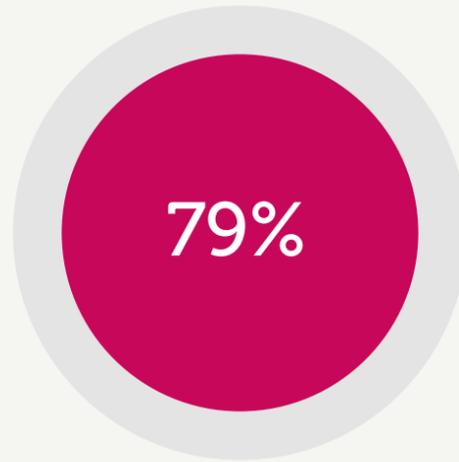
## 2.1 Opening the door



OF CLIENTS '**DISLIKE**' COLD NEW BUSINESS PHONE CALLS



In an environment where clients like to 'discover' new agencies rather than be sold to, cold new business calls feel intrusive.



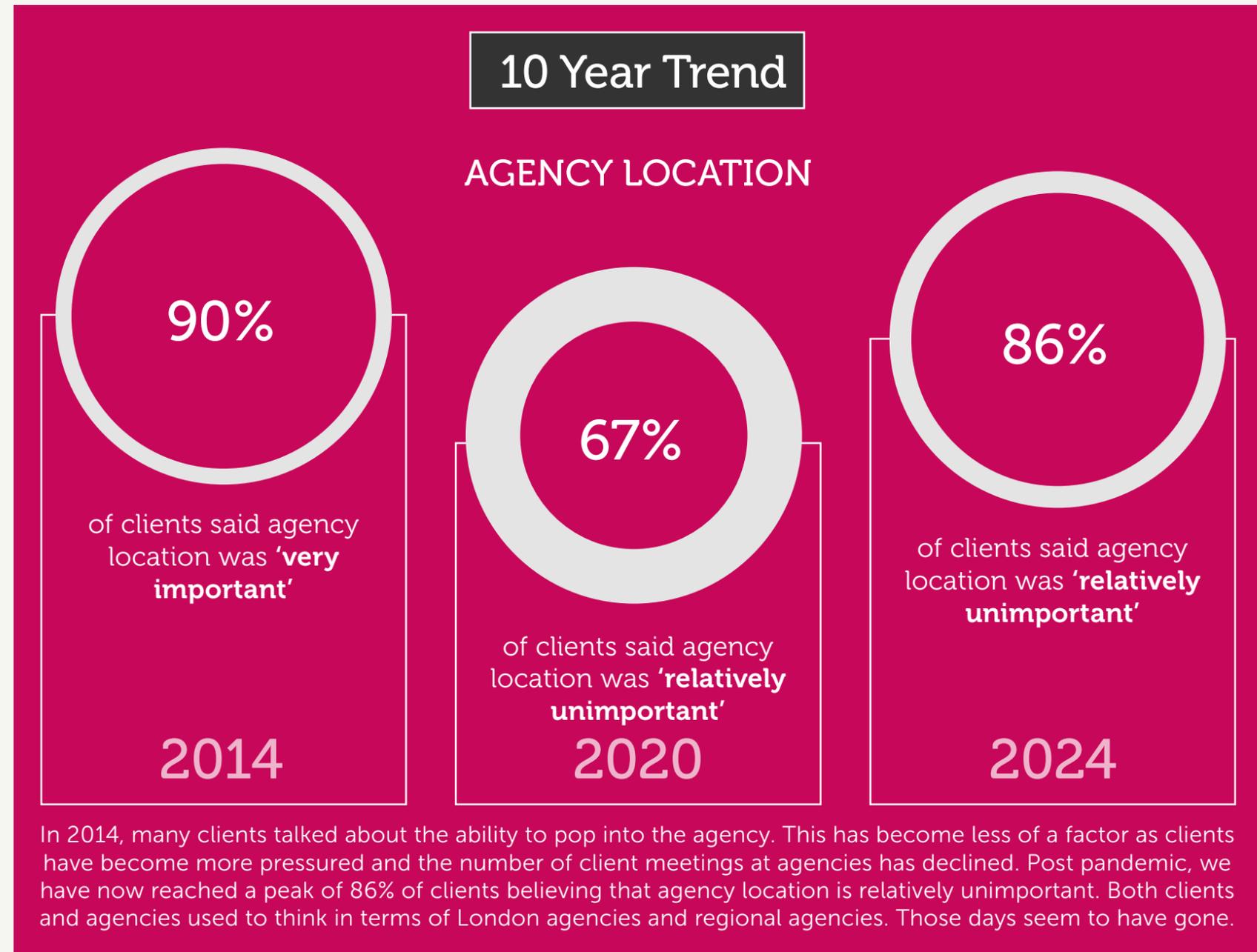
OF CLIENTS BELIEVE THE BEST WAY TO SOURCE NEW AGENCIES IS THROUGH **RECOMMENDATIONS FROM COLLEAGUES**



Other most mentioned sources are awards, LinkedIn, a highly relevant case study or a timely new business approach.

A large graphic on a dark red background. It features a large, stylized number '8' formed by two overlapping circles. Below the '8' is the text 'NEW BUSINESS APPROACHES EVERY DAY' in white, bold, uppercase letters. Underneath this text is a white decorative flourish. At the bottom of the graphic, there is a paragraph of text in white: 'The average number of direct new business approaches that clients are fielding each day from agencies of all different disciplines.'

## 2.1 Opening the door

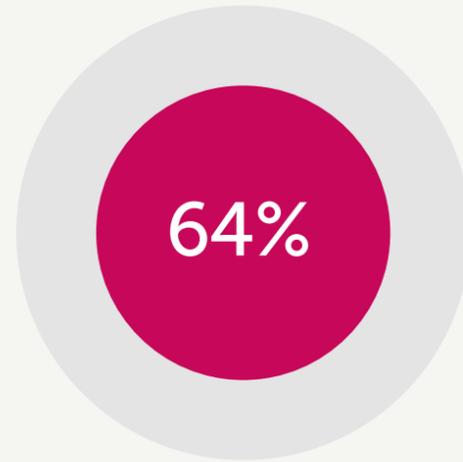


## 2.2 Presentations & pitches

New business presentations – What do clients look for?

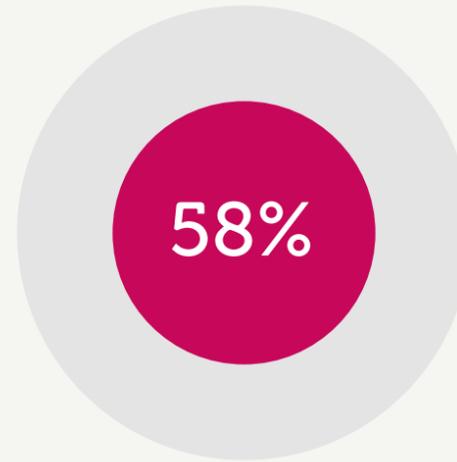


## 2.2 Presentations & pitches



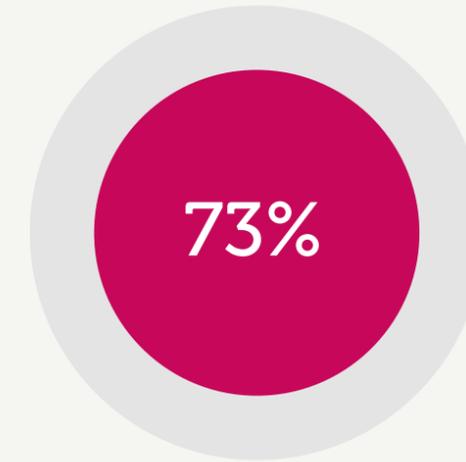
OF CLIENTS STATED THAT AGENCY NEW BUSINESS PRESENTATIONS TEND TO BE **TOO LONG**

Allowing enough time for discussion and questions is crucial.



OF CLIENTS HAVE EXPERIENCED **'TOO MANY CASE STUDIES'** IN AGENCY NEW BUSINESS PRESENTATIONS

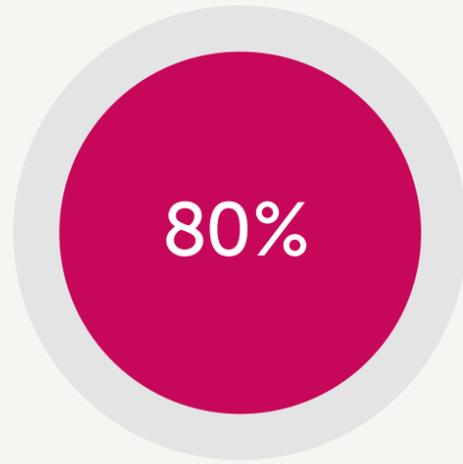
A few well targeted, relevant case studies are usually better than a safety in numbers approach.



OF CLIENTS **'FIND IT DIFFICULT'** TO DIFFERENTIATE BETWEEN AGENCIES IN A NEW BUSINESS SCENARIO

Agencies are paying more attention to their points of difference in a crowded market, but clients are still not seeing it.

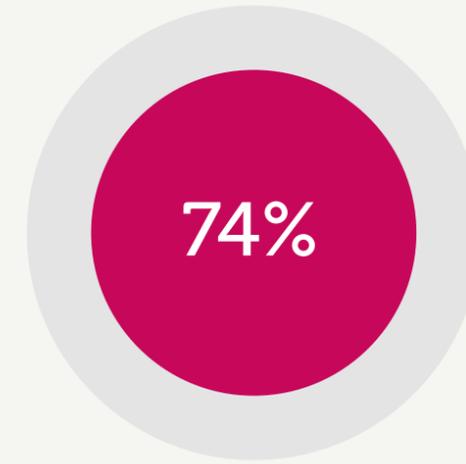
## 2.2 Presentations & pitches



OF CLIENTS STATED THAT THE BEST NEW BUSINESS MEETINGS FELT MORE LIKE A **NATURAL DISCUSSION** THAN A FORMAL PRESENTATION



Time and space for questions and debate, rather than always reverting to presentation mode.



OF CLIENTS STATED THAT THE WINNING AGENCY HAD A MORE **ENGAGING PRESENTATION STYLE**



It's not just what you say but the way that you say it! Better presentation skills, better use of analogies and anecdotes.

## 2.2 Presentations & pitches

### TOP 5 REASONS FOR WINNING A PITCH:

**1****Clear, memorable message**

The agency brought clarity and a firm overall recommendation. Raising lots of questions and issues is fine, but the winning agency made it easier for clients to buy into a clear argument. After several agencies had presented, clients were able to accurately recall, 'They were the ones that said' about the winning agency.

**2****Great team**

The people chemistry was good. There were some impressive individuals but it felt like a team. They bounced off each other well and one person didn't dominate.

**3****'They got it'**

The agency showed that they really understood the client's particular challenges and anxieties, over and above simply showing a good level of market understanding.

**4****More tailored**

Clients often refer to losing pitches as feeling 'more generic'. By contrast, winning pitches feel bespoke, as if they could only be presented to that particular client.

**5****More effort**

Maybe that involved store visits, focus groups, vox pops or just more effort to bring a particular idea to life.

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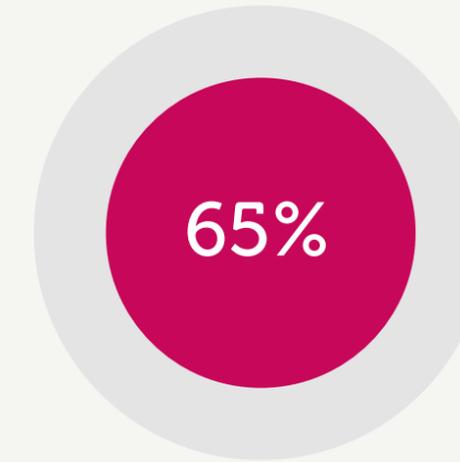
## 2.2 Presentations & pitches



OF CLIENTS VIEW A **PITCH AS A PROCESS, NOT A ONE HIT PRESENTATION**



Clients are wanting to see agencies get better and better through the process. It may be a mistake for an agency to share its best ideas too early.

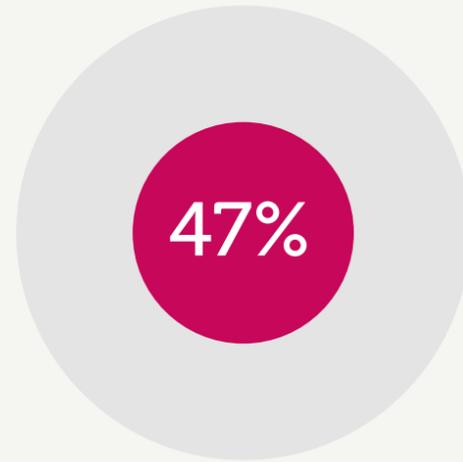


OF CLIENTS FELT THAT THE **WINNING PITCH PRESENTATION FELT 'MORE POLISHED'**



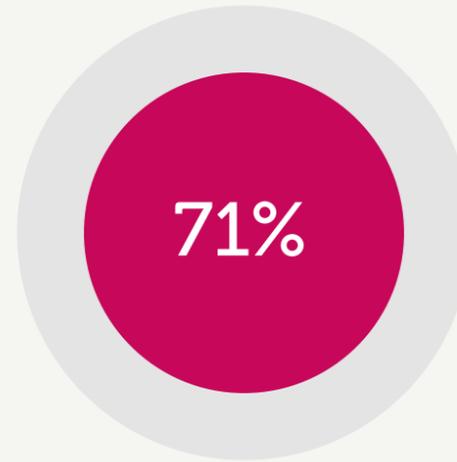
It seemed to run more smoothly, presentation skills were better and it had obviously been worked on and rehearsed. By contrast, some presentations almost feel as if the agency has just rocked up.

## 2.2 Presentations & pitches



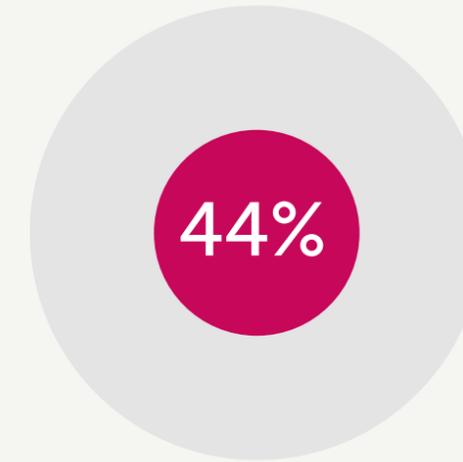
OF CLIENTS REFERRED TO AGENCY TENDER/PITCH DOCUMENTS WITH **TYPOS AND OTHER MISTAKES**

Clients seem to hone in on this, particularly early on in the pitch process. At this stage, they are trying to find ways to exclude agencies and arrive at a shortlist. Something as small as a spelling mistake can give them a reason.



OF PITCHES ARE LOST BECAUSE OF **SOFTER FACTORS** OVER AND ABOVE HARDER FACTORS

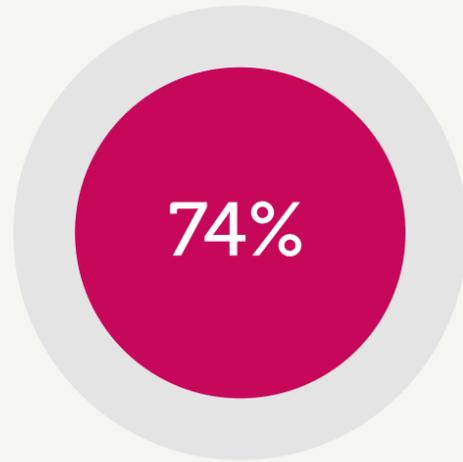
A similar statistic to previous reports. Softer factors include the team, personal chemistry, a presentation that flows, being confident but not arrogant.



OF CLIENTS BELIEVE THAT AGENCIES SHOULD **ADOPT A BOLDER APPROACH** IN PITCHES

A great pitch presentation should fire the imagination, see something differently or propose a new path. Instead, these clients complain that agencies are 'giving us what they think we want to hear'.

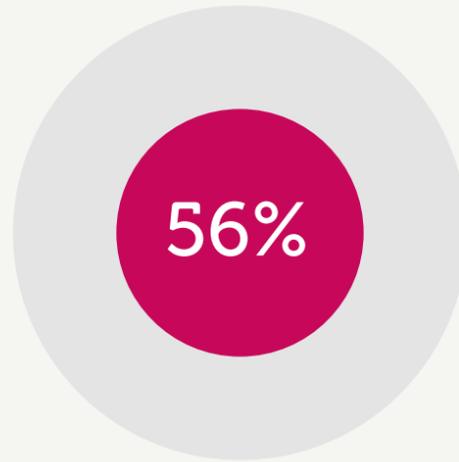
## 2.3 Websites & marketing content



OF CLIENTS FIND IT FRUSTRATING WHEN PROFILES OF AGENCY PRINCIPALS ARE **NOT ADEQUATELY SHOWN ON AN AGENCY'S WEBSITE**



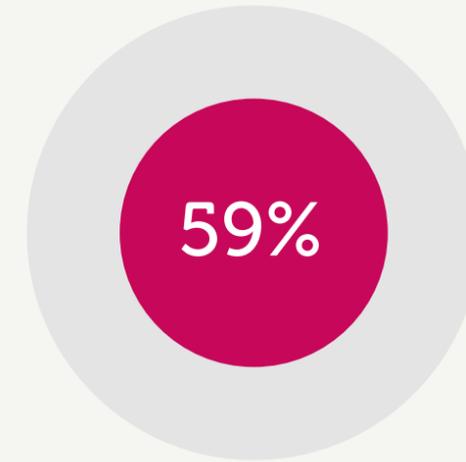
People **are** the agency, so don't hide.



OF CLIENTS FIND AGENCIES' OFFER AND SERVICES ON WEBSITES **CONFUSING**



These clients talk about a certain amount of reading between the lines that's required to find out the agency's sweet spot. There is also a wariness about agencies that list too many services.



OF CLIENTS ADMIT TO FINDING IT **'DIFFICULT'** TO ESTABLISH WHAT AN AGENCY IS BEST AT WHEN LOOKING AT THEIR WEBSITE



With many agencies offering multiple services, this is becoming challenging. The client is sometimes left wondering about the rationale behind the services. What's the glue that binds them together?

## 2.3 Websites & marketing content

### HOW ARE CLIENTS LOOKING AT AGENCY WEBSITES?

Our interviews show that clients are generally seeking the answer to 4 basic questions:

**1**

#### Who?

Is the agency big or small, corporate or friendly? Is there a positioning or point of difference? Who are the founders and leaders? Independent or part of a group?

**2**

#### What?

Has the agency worked with anyone in my market? Have they addressed a similar challenge? What is their offer and is it clear? What are they best at? Is the work explained or just a beauty parade of images?

**3**

#### How?

How does the agency approach projects? How strategic and consultative are they? What might they be like to work with? Are they flexible or more rigid in the way they work?

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#### Why?

Why are they in business? What drives them? Do they have views and opinions?

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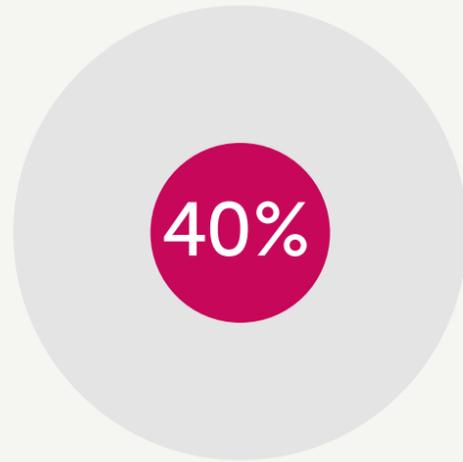
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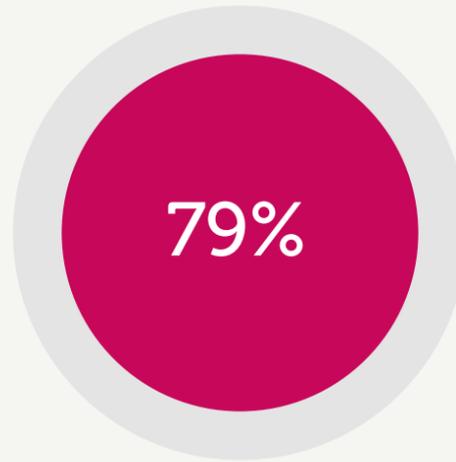
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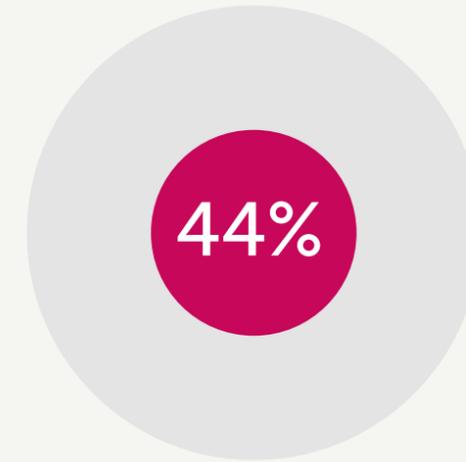
OF CLIENTS BELIEVE THAT THERE IS **TOO MUCH OVER CLAIM** ON AGENCY WEBSITES

Quite understandably, small and medium sized agencies use their websites as an opportunity to put their best foot forward and punch above their weight, but they need to get the balance right. Clients are wary of agencies over stating their services and capability. The message here is to keep it honest and straightforward.



OF CLIENTS EXPECT THEIR AGENCY TO PRODUCE A **REGULAR NEWSLETTER**

Engagement levels vary depending on the content, but most clients appreciate a regular newsletter. It has become a standard means of agency to client communication, and it usually raises questions when an agency doesn't produce one.



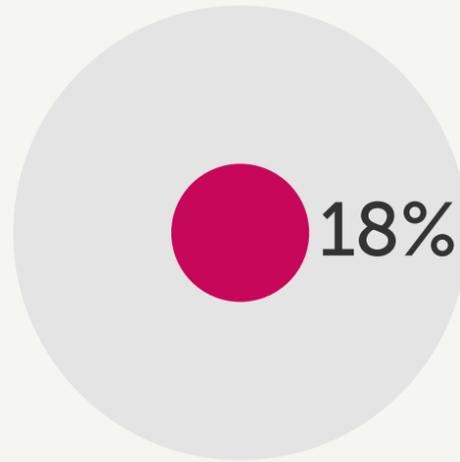
OF CLIENTS STATED THAT THEIR AGENCY'S **NEWSLETTER IS INCONSISTENT** IN TERMS OF FREQUENCY

Agencies can be poor at consistency. Initiatives like newsletters can often slip when things get busy, but this can cause negative perceptions for clients.

## 2.3 Websites & marketing content

### LinkedIn

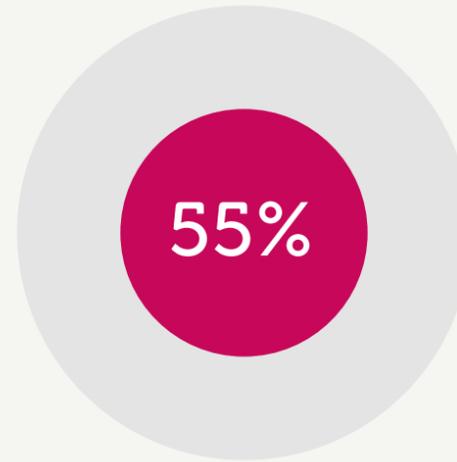
This year we've asked clients about their LinkedIn use in more detail. In the past, clients have tended to say that they use LinkedIn but now we've probed their actual level of engagement on the platform.



**OF CLIENTS CLAIM TO FOLLOW  
THEIR AGENCY ON LINKEDIN**



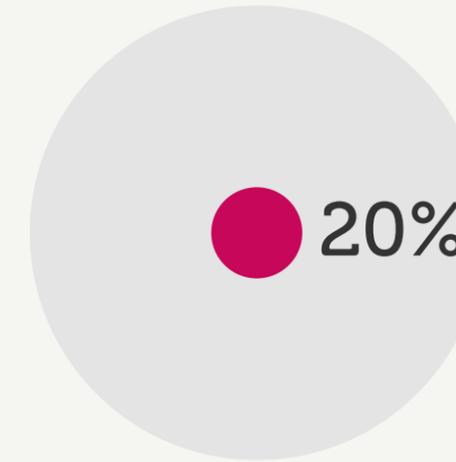
As distinct from being connected with individuals.



**OF CLIENTS HAVE A VERY LOW  
LEVEL OF ENGAGEMENT WITH  
LINKEDIN**



They are on LinkedIn but are visiting infrequently and are generally not posting. In effect, they need to be reached by other more direct means.

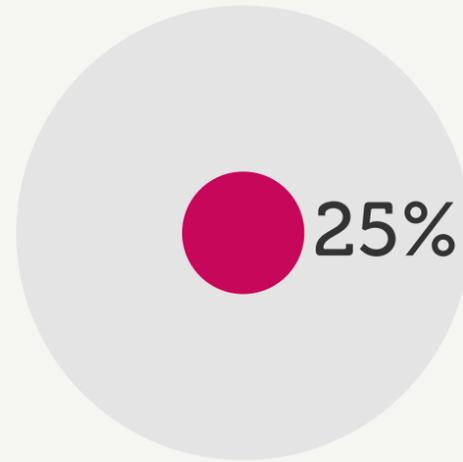


**OF CLIENTS DO NOT ENGAGE  
ON LINKEDIN OR ANY OTHER  
PLATFORM**



Again, these clients need to be reached by other more direct means.

## 2.3 Websites & marketing content



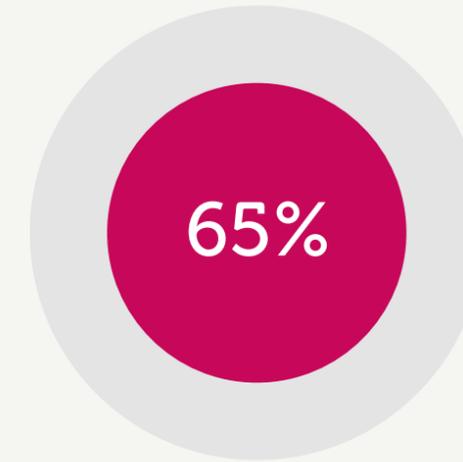
OF CLIENTS ARE MORE ACTIVELY ENGAGED ON LINKEDIN

Therefore, agency activity on LinkedIn is only reaching a relatively limited number of clients in any meaningful way. Clients will happily say they are on LinkedIn but only 25% appear to be actively engaged.



OF CLIENTS WOULD LIKE AGENCIES TO EXPRESS MORE VIEWS AND OPINIONS IN THEIR MARKETING CONTENT

Clients often complain of too much trivia, recruitment and self-promotion.

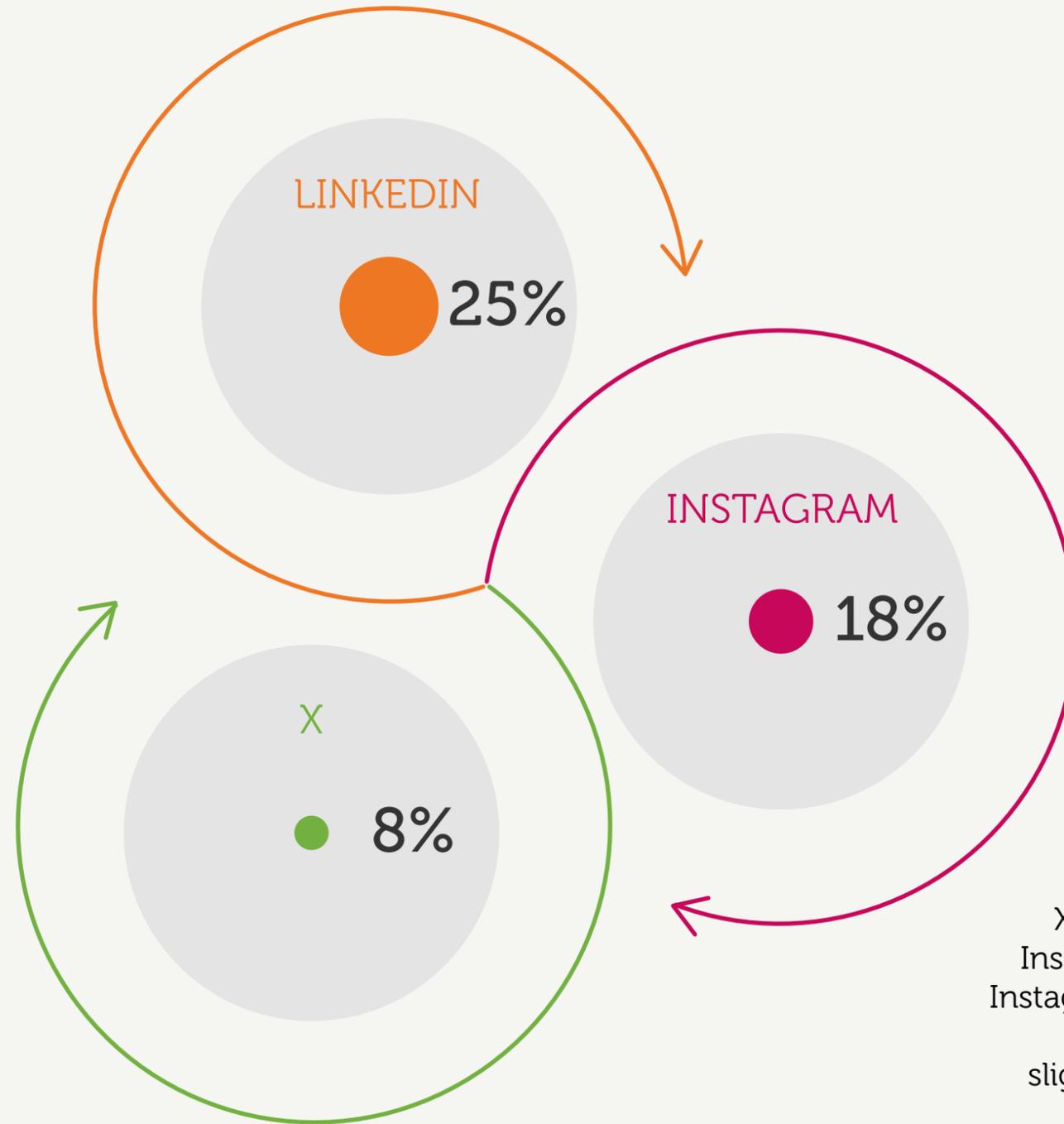


OF CLIENTS AGREE THAT 'AUTHENTICITY' IS THE MOST IMPORTANT QUALITY OF A GREAT POST

Sincerely held views – these are the ones that really stand out. Not virtue signalling, following the crowd or continual self-promotion.

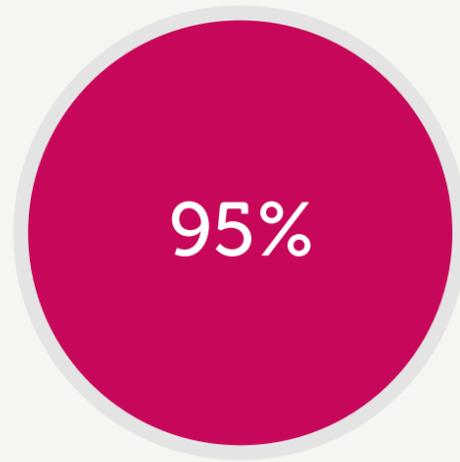
## 2.4 Marketing Content

These are the levels of 'active engagement' on different platforms, as opposed to clients just saying, 'I'm on Instagram' or 'I'm on LinkedIn.'



X has declining engagement while Instagram engagement is increasing. Instagram is more popular with Design Managers, the retail sector and a slightly younger age range of clients (approx. under 35yrs).

## 2.5 Agencies versus In-House



OF CLIENTS WITH AN IN-HOUSE CREATIVE RESOURCE STILL SEE THE VALUE IN USING **EXTERNAL AGENCIES** FOR PARTICULAR CHALLENGES



Clients mention bigger, more strategic projects or where a fresh perspective is particularly called for. Agencies are also being asked to work more collaboratively with in-house creative teams.

### ADVANTAGES OF IN-HOUSE

These are clients' most mentioned advantages of utilising in-house creative resources, rather than an external agency:

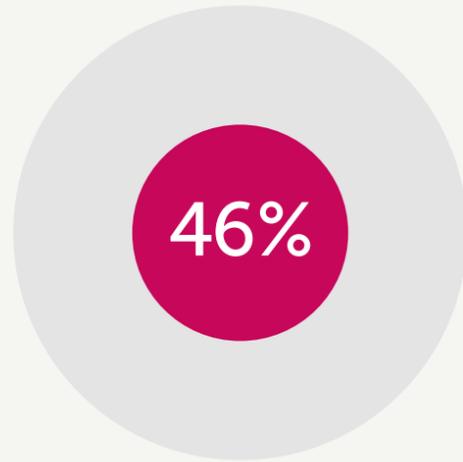
- 1 Cheaper cost**  
The biggest advantage that in-house creative departments have over agencies. Some in-house creative departments like to view themselves as agencies but forget that their cheaper costs mean this is not a level playing field.
- 2 More immersed in the brand and organisation**  
By definition, in-house means they are on the inside. They are immersed in the brand(s) and sector. The in-house resource also understands the organisation, its politics, processes and culture.
- 3 More accountable**  
As opposed to an external agency, the client will have more control if things go wrong or the work is not on brief.

### ADVANTAGES OF AN EXTERNAL AGENCY

These are clients' most mentioned advantages of using an external agency, rather than in-house creative resources:

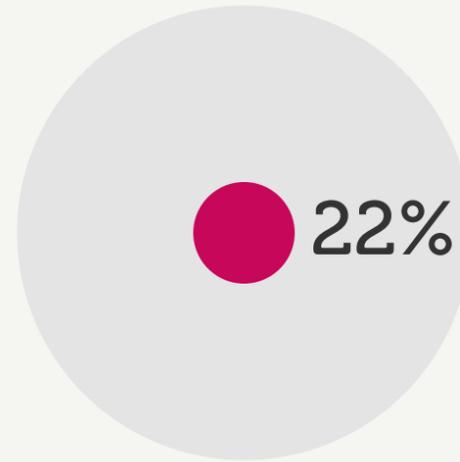
- 1 Wider experience to draw upon**  
A big appeal of the agency is their diverse experience. Rather than being locked into one sector, they can bring learning from many brands and markets. They have more reference points.
- 2 Will challenge more**  
Clients hope and expect that an agency will challenge more and bring a different perspective. By contrast, in-house resource can easily 'go native'.
- 3 Breadth of skills**  
Some clients mentioned their feeling that external agencies were likely to be slightly more cutting edge in terms of skills and access to different specialisms.

## 2.5 Agencies versus In-House



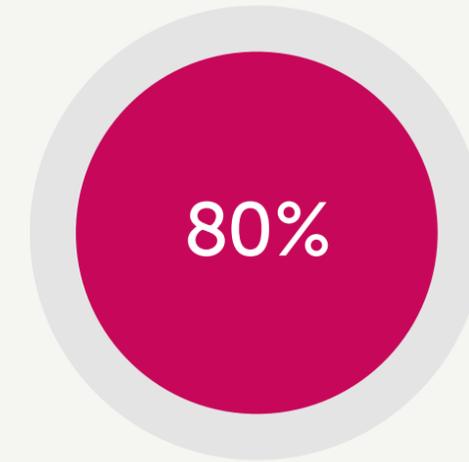
OF CLIENTS INTERVIEWED  
HAD ACCESS TO AN **IN-HOUSE**  
CREATIVE RESOURCE

The quality and extent of the in-house resource varies markedly. At the less sophisticated end, there is the in-house studio. This is something that clients can dip into as and when required. At the more sophisticated end are the companies where the value of design within the company is being elevated and design is central to the approach.



OF CLIENTS WITH NO  
IN-HOUSE CREATIVE  
RESOURCE STATED THAT THEIR  
COMPANY WAS **CURRENTLY**  
CONSIDERING ONE

The rise of creative in-housing continues.



OF CLIENTS WITH IN-HOUSE  
CREATIVE RESOURCE WOULD  
LIKE TO SEE A GREATER LEVEL  
OF **COLLABORATION WITH**  
EXTERNAL AGENCIES

Not an us versus them scenario, but in-house and agencies working together.

---

Over 80% of the clients we interviewed believe that the creative standards of UK agencies are generally 'very high'.

---

# 3

## Retaining & Growing Clients



### 3.1 Client service



**1**  
ONCE EVERY  
3 MONTHS

**3**

**AVERAGE NUMBER OF  
CLIENT/AGENCY  
FACE TO FACE MEETINGS**

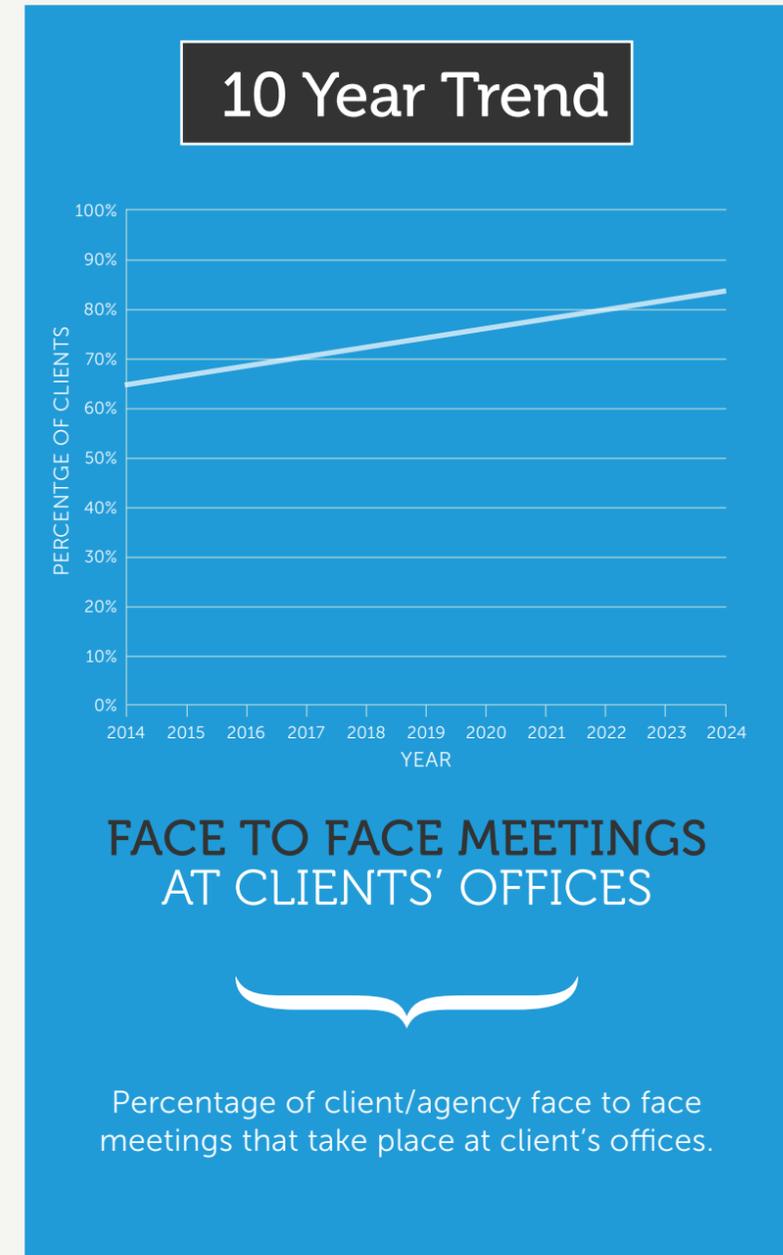
Face to face interaction is now increasingly about the more pivotal meetings – briefing sessions, presenting concepts etc. Day to day matters have shifted online.



**83%**

**OF ALL CLIENT/AGENCY FACE  
TO FACE MEETINGS TAKE PLACE  
AT THE CLIENTS' OFFICES**

An indication of how time pressured most clients feel. A trip to the agency is nice but time consuming.



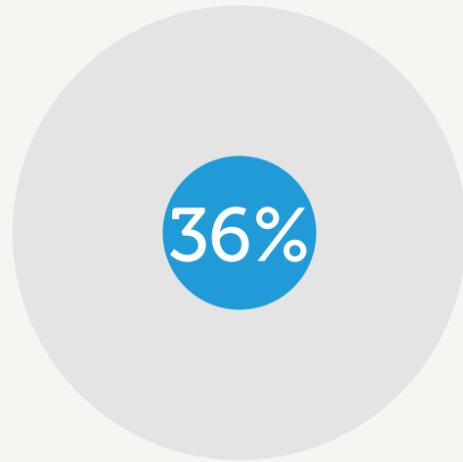
**10 Year Trend**

YEAR	PERCENTAGE OF CLIENTS
2014	65%
2015	68%
2016	71%
2017	74%
2018	77%
2019	80%
2020	83%
2021	86%
2022	89%
2023	92%
2024	95%

**FACE TO FACE MEETINGS  
AT CLIENTS' OFFICES**

Percentage of client/agency face to face meetings that take place at client's offices.

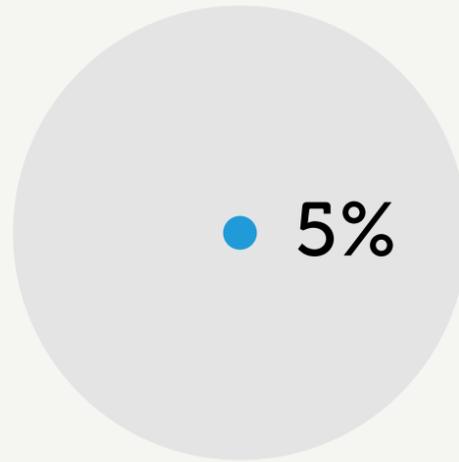
### 3.1 Client service



OF CLIENTS BELIEVE THAT THE NUMBER OF **ONLINE MEETINGS** WITH THEIR AGENCY COULD BE SLIGHTLY REDUCED



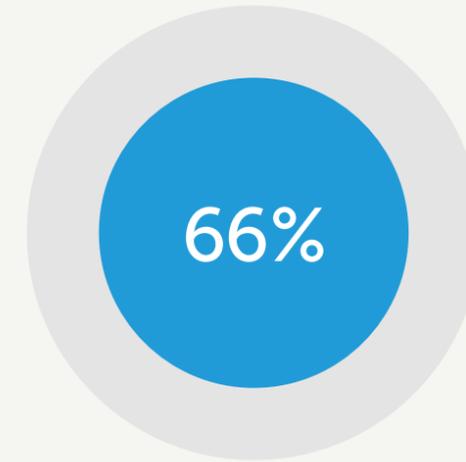
Clients have a degree of online meeting fatigue.



OF THE CLIENTS INTERVIEWED HAD NEVER MET THEIR AGENCY **FACE TO FACE**



In fact, these clients seemed largely unconcerned about it and were happy for that situation to continue.

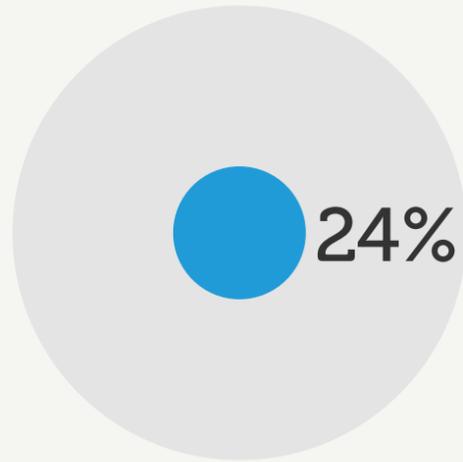


OF CLIENTS COMPLAINED ABOUT **AGENCY STAFF CHURN AND CHANGES**



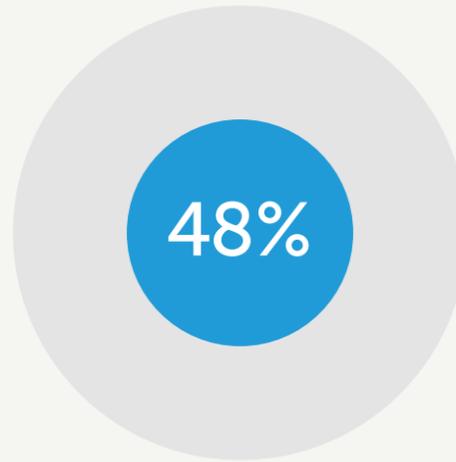
This can be frustrating for clients because they are always concerned about adequate knowledge transfer to new team members and possible disruption to the flow of a project.

### 3.1 Client service



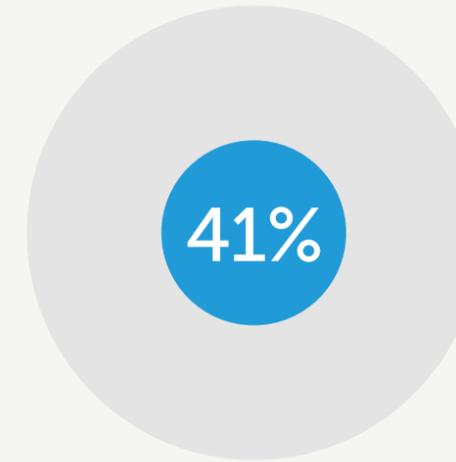
OF CLIENTS FELT THAT AGENCY **COMMUNICATION** AROUND TEAM CHANGES WAS POOR

Clients mention team changes being flagged up very late or sometimes not at all.



OF CLIENTS BELIEVE THAT THEIR AGENCY'S ACCOUNT MANAGEMENT IS TOO **TRANSACTIONAL**

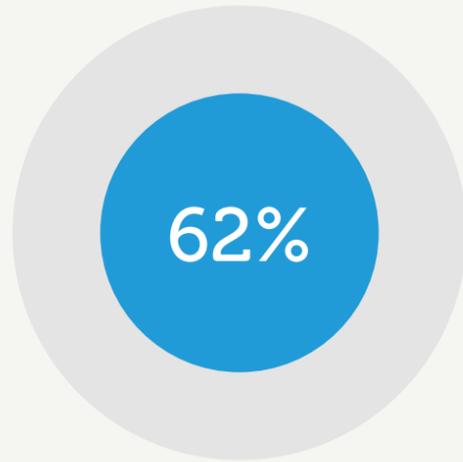
For nearly half the clients interviewed, day to day account management lacks that level of added value, proactivity, views and opinions. It can easily sink to a 'command and control' relationship where account managers are simply taking direction.



OF CLIENTS STATED THAT THEIR AGENCY IS NOT PROVIDING ENOUGH **STRATEGIC THINKING OUTSIDE** OF KEY STRATEGIC PHASES

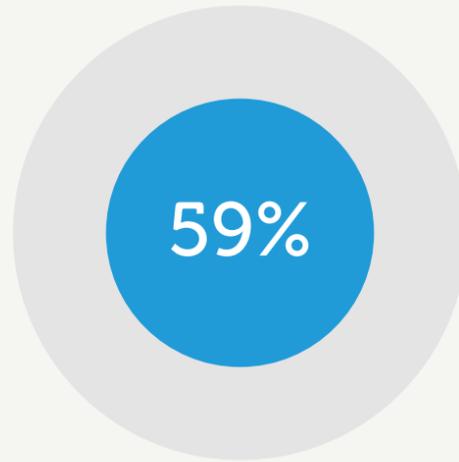
Their complaint is that strategic thinking and a more consultative approach often seems to be locked into a project's defined strategic phases, rather than being evident throughout the life of a project.

### 3.1 Client service



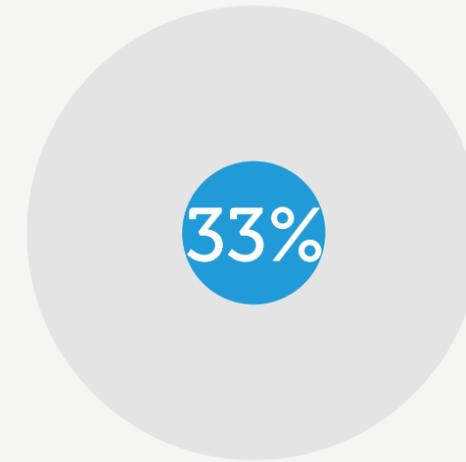
OF CLIENTS CAN RECALL PERIODS WHEN THEIR AGENCY HAS BEEN OBVIOUSLY STRETCHED AND UNDER RESOURCED

Slow response times, asking for more time, lack of quality control and attention to detail are often cited as evidence that the agency appears 'stretched'. This often becomes a potential barrier for future big projects – will the agency be able to cope?



OF CLIENTS STATED THAT THEY ARE LOOKING FOR A DIFFERENT TYPE OF SUPPORT FROM THEIR AGENCY IN THE NEXT 1-2 YEARS

Things may be fine right now, but these clients are expecting more in the future. It could be more strategic awareness and input or more knowledge of the company's operations. In long established relationships, it can sometimes be a desire for more new ideas and innovation to inject life into a relationship that may have become too 'comfortable'.



OF CLIENTS BELIEVE THAT CONVENTIONAL AGENCY 'WAYS OF WORKING' CAN BE TOO SLOW AND CUMBERSOME

Conventional agency ways of working are seen to be out of kilter with the pace of change in some areas. For example, social media moves too fast and demands a more fluid and collaborative process than many agencies offer.

## 3.1 Client service

10 most mentioned ways to improve client service:

1

### Drive the project, don't just manage it

Clients talk about the difference between efficient but passive management and being truly on top of everything, chasing things and really owning the project. Ultimately, that takes the pressure and workload off the client.

2

### More proactivity and interest

When things get busy, client service can quickly become very functional. The added value can lapse. Where are the questions, insights, analogies, 'have you seen this?'

3

### More regular updates

More updates but also quicker, shorter and sharper. Our interviews show that most clients appreciate concise updates not big reports.

4

### Better attention to detail

These are often small issues but they can become a source of real frustration for clients if not dealt with.

5

### Better listening

Really understanding the nuances. This is usually connected to briefing sessions and subsequent work that the client feels has missed the brief in some way.

6

### Be bolder

Account management that is too nice or a touch too timid. This is about not being afraid to raise concerns, suggest better ways of doing things, chase the client harder or argue your case.

7

### Not pursuing ideas

Clients mention thoughts and ideas mentioned in meetings that are not really captured and followed up on – 'What happened to that idea we had 6 months ago? The agency never followed up on that.'

8

### Not enough strategic oversight

The strategy phase was completed but there's no real strategic lens on things through the rest of the project. It seems to be more about just 'doing'.

9

### Be more realistic

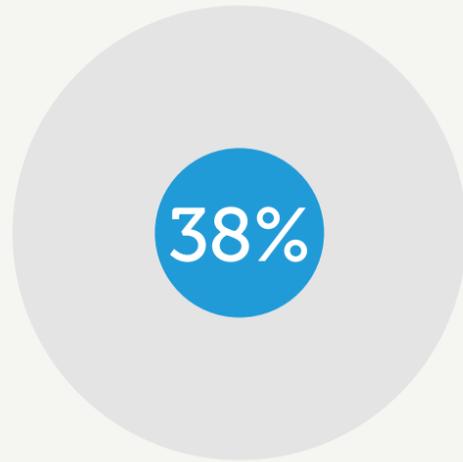
Align expectations better. Be realistic about deadlines and what can be achieved in the time.

10

### Learn to say 'No'

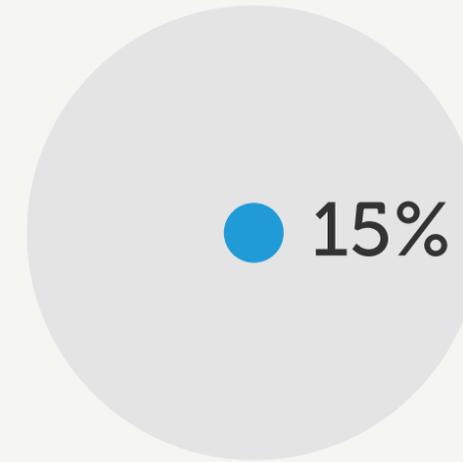
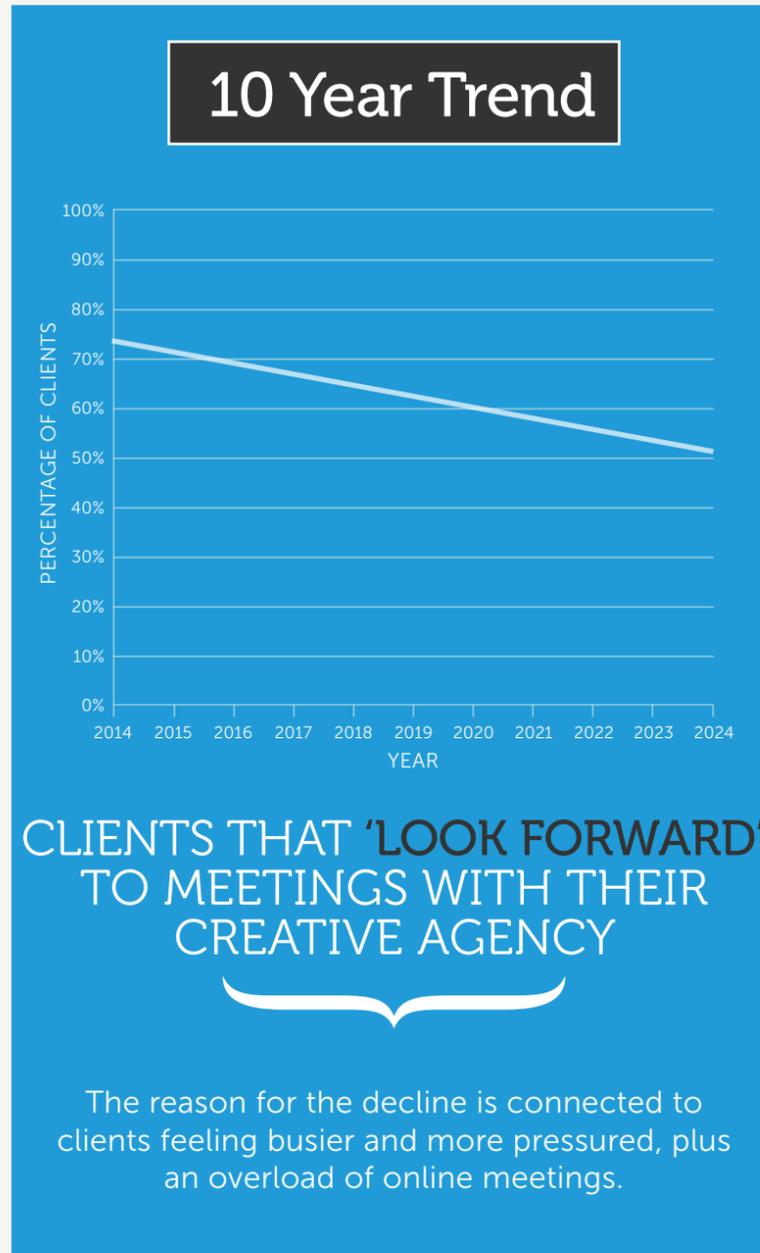
Clients prefer their agency to say, 'No, that's not our main skill set. But we know a company that can help you.' Our interviews reveal instances where agencies, usually in a spirit of helpfulness, have taken something on that then causes problems and unnecessarily strains the relationship.

### 3.1 Client service



OF CLIENTS BELIEVE THAT THEIR AGENCY IS **TOO WILLING TO ACCEPT A POOR CLIENT BRIEF**

These clients admit that their briefings are sometimes too quick and lacking in focus. While they accept some of the blame, they also point out that the agency is supposed to be the expert and it's down to the agency to ask the right questions and press the client to be better.



OF CLIENTS STATED THAT THE FIRST STRATEGIC PHASE WAS ALREADY **OUT OF DATE TOWARDS THE END OF THE PROJECT**

The pace of change is a major client challenge. There is a need for agencies to be more fluid in their approach.

## 3.1 Client service

### TOP 5 SITUATIONS THAT CAUSE CLIENTS MOST INTERNAL EMBARRASSMENT:

**1****Having to ask for more budget**

The fault can often lie with both agency and client, but exceeding the budget and needing to ask, internally, for more budget is an egg on face moment for clients.

**2****Failing to deliver on time**

Again, the fault for late delivery does not always lie completely at the agency's door, but when the new identity, website or brand relaunch has to be delayed, the internal embarrassment can be acute.

**3****Unsuccessful recommendation**

The client sings their agency's praises to a colleague and refers them. Then, the work is poor and their colleague is unimpressed. It all ends up reflecting badly on them. Clients can sometimes be nervous about giving personal recommendations once they've had their fingers burnt in this way.

**4****Agency is too passive**

The client has championed the agency internally, but the agency is not reciprocating by reaching out to the right people and being proactive. The client then feels slightly let down.

**5****Poor performance in front of senior management**

Senior management often need a more straightforward presentation that cuts to the chase. Clients recall examples where agency presentations were too long and also not well enough prepared.

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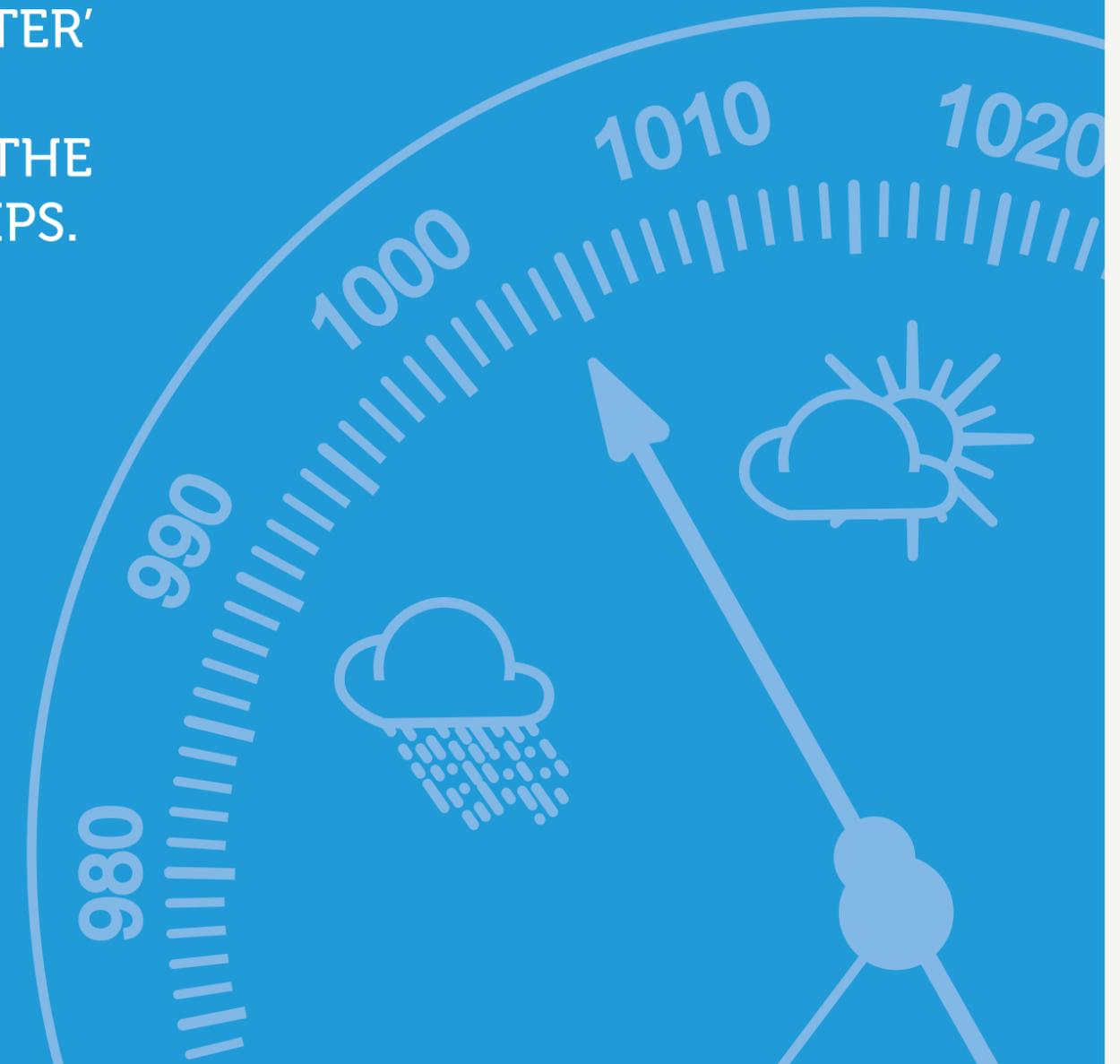
5

#### Poor performance in front of senior management

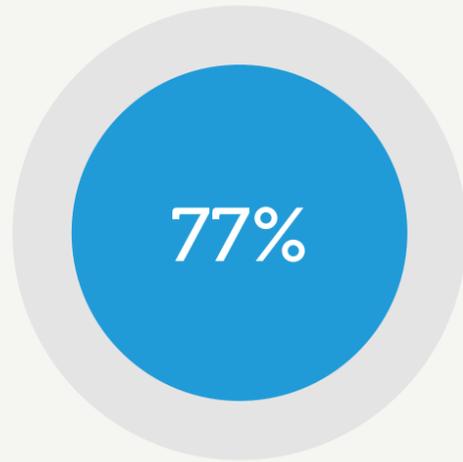
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## 3.2 Barometer questions

THERE ARE A NUMBER OF CRUNCH 'BAROMETER' QUESTIONS THAT WE ASK IN EVERY CLIENT INTERVIEW. THESE ARE BASIC MEASURES OF THE STRENGTH OF CLIENT/AGENCY RELATIONSHIPS.

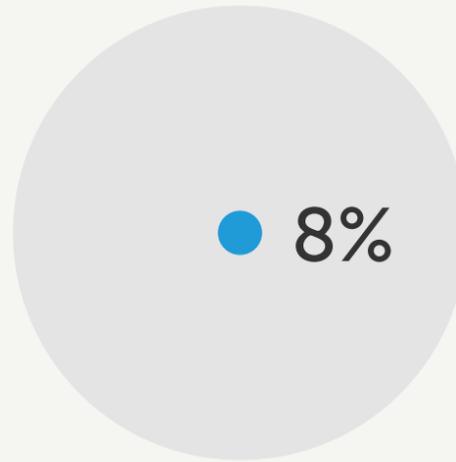


## 3.2 Barometer questions



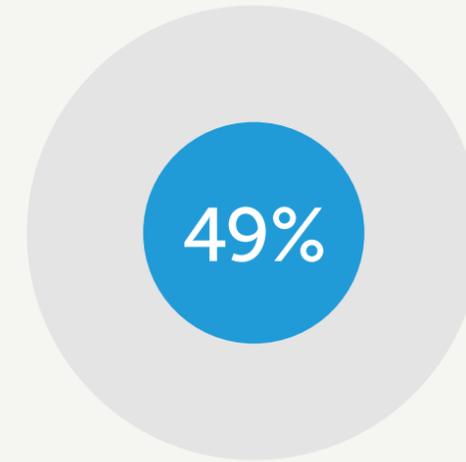
OF CLIENTS DESCRIBES THEIR FEELINGS TOWARDS THEIR AGENCY AS **'POSITIVE'**

Despite the constructive criticisms, most are given within the context of a broadly positive relationship.



OF CLIENTS STATED THAT THEIR AGENCY **'REGULARLY EXCEEDS'** THEIR EXPECTATIONS

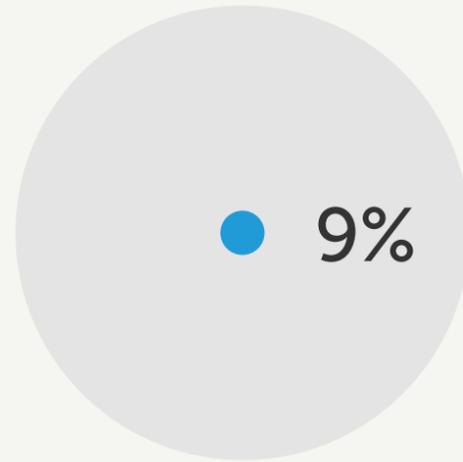
'Regularly exceeds' is a very high bar. Clients are often loath to say this as it implies that there is no room for improvement.



OF CLIENTS STATED THAT THEIR AGENCY **'MEETS AND SOMETIMES EXCEEDS'** THEIR EXPECTATIONS

An encouraging statistic. Proof that many of the criticisms that clients raise in our interviews are about how to make the relationship even better, rather than necessarily being suggestive of deep flaws.

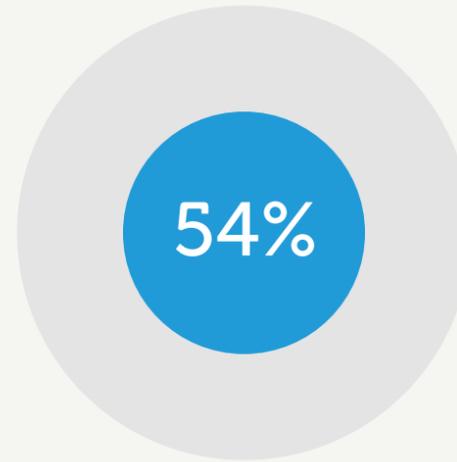
## 3.2 Barometer questions



OF CLIENTS DESCRIBED THEIR AGENCY AS **'THE BEST'** PARTNER/SUPPLIER THAT THEY WORK WITH, REGARDLESS OF DISCIPLINE



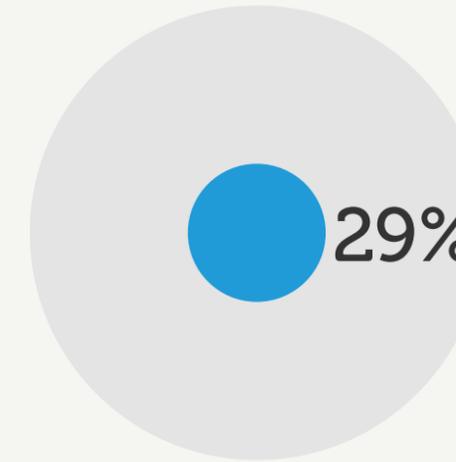
This is praise indeed and difficult to achieve when large companies are often working with multiple agencies.



OF CLIENTS WOULD RECOMMEND THEIR AGENCY **'UNRESERVEDLY'** AS OPPOSED TO **'WITH CAVEATS'**



A slight increase on last year.



OF CLIENTS BELIEVE THEIR AGENCY **SHOULD KNOW MORE** ABOUT THEIR BRAND AND MARKET



A lot of client comments are around the need for greater proactivity to gain a better understanding and the need to keep learning beyond initial immersion and discovery phases.

## 3.2 Barometer questions

### TOP 5 'CAVEATS' WHEN RECOMMENDING AN AGENCY:

1

#### Could be more proactive

They will deliver well but that added level of proactivity to create a partnership type relationship is missing.

2

#### Make sure you get certain people

A few individuals are really strong, but quality and experience levels lower down can be variable.

3

#### Services are not equally strong

Very strong in some areas but weaker in others. For example, 'Yes for website design and build, but not for social media' or 'Yes for brand evolution but not for innovation.'

4

#### Watch the costs

Maybe the agency is seen as disproportionately expensive for certain tasks. Maybe watch for scope creep. Maybe the agency would only be best value for bigger projects but uneconomic for more routine jobs.

5

#### Set aside plenty of time

The agency manages projects, but they don't necessarily drive them. This will involve the client investing more time to keep an eye on things.

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1

#### Could be more proactive

They will deliver well but that added level of proactivity to create a partnership type relationship is missing.

2

#### Make sure you get certain people

A few individuals are really strong, but quality and experience levels lower down can be variable.

3

#### Services are not equally strong

Very strong in some areas but weaker in others. For example, 'Yes for website design and build, but not for social media' or 'Yes for brand evolution but not for innovation.'

4

#### Watch the costs

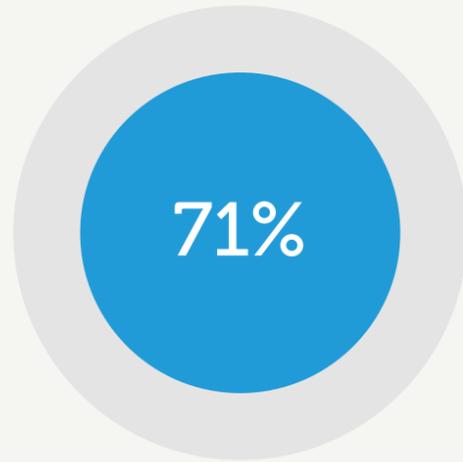
Maybe the agency is seen as disproportionately expensive for certain tasks. Maybe watch for scope creep. Maybe the agency would only be best value for bigger projects but uneconomic for more routine jobs.

5

#### Set aside plenty of time

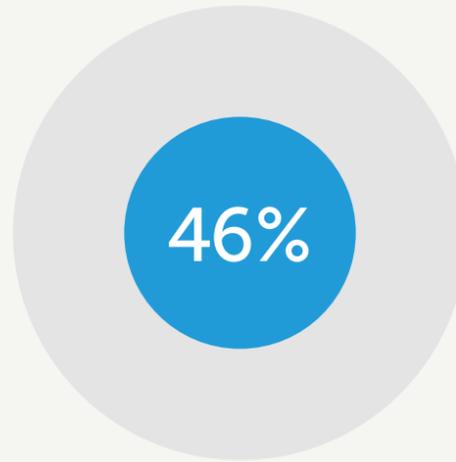
The agency manages projects, but they don't necessarily drive them. This will involve the client investing more time to keep an eye on things.

## 3.2 Barometer questions



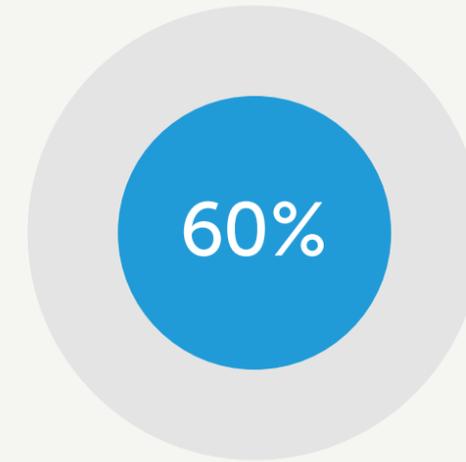
OF CLIENTS STATED THAT THEIR AGENCY **'ALWAYS'** MEETS AGREED TIMELINES

Clients were generally reasonable in admitting when deadlines were difficult or when they were to blame, either fully or partially, for deadlines not being met.



OF CLIENTS CONSIDER THEIR AGENCY TO BE **GOOD VALUE** FOR MONEY

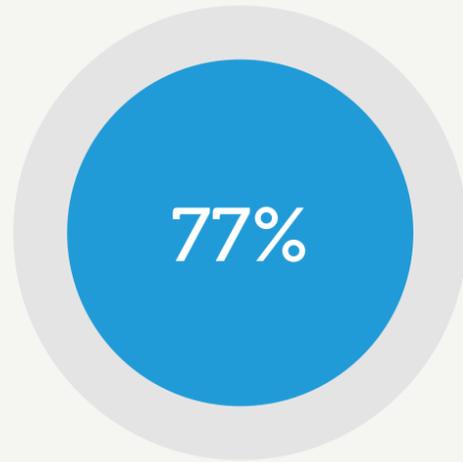
A 9% decrease from last year, no doubt reflecting the increasing budget pressure that clients are feeling.



OF CLIENTS VIEW THEIR AGENCY AS A **'PARTNER'**

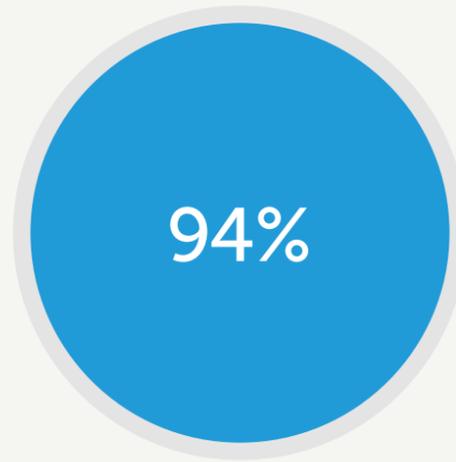
As opposed to describing the agency as 'a supplier' or 'a bit of both.' The biggest factor this year in clients describing their agency as a partner was the perceived level of proactivity. It's not enough to just do what it says on the tin and answer the brief.

### 3.3 Client development



OF CLIENTS ONLY HAVE  
**'PARTIAL KNOWLEDGE'** OF  
THEIR AGENCY'S FULL OFFER

Faced with an option of 'totally clear', 'partial knowledge' or 'unclear', most clients only have 'partial knowledge'. Agencies could work harder to ensure their clients are familiar with their full offer. Perhaps this statistic also reflects the fact that many agencies offer multiple services and find it difficult to convey them in a concise way.



OF CLIENTS AGREE THAT  
**GOOD CLIENT DEVELOPMENT**  
IS WHEN IT ADDS VALUE FOR  
BOTH CLIENT AND AGENCY

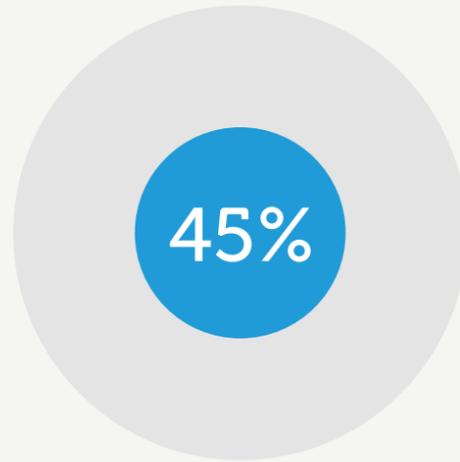
Clients give examples of client development activity that doesn't feel forced or misplaced because it's pertinent, well timed and potentially adding value.



OF CLIENTS CAN POINT  
TO SPECIFIC MISSED  
**OPPORTUNITIES** FOR AGENCY  
CLIENT DEVELOPMENT

Is the agency doing the things they should be doing in order to spread the word and develop more business within a large organisation? Not always. These clients can point to individuals or departments that the agency should be contacting that they're not or suggest proactive actions that are not being taken.

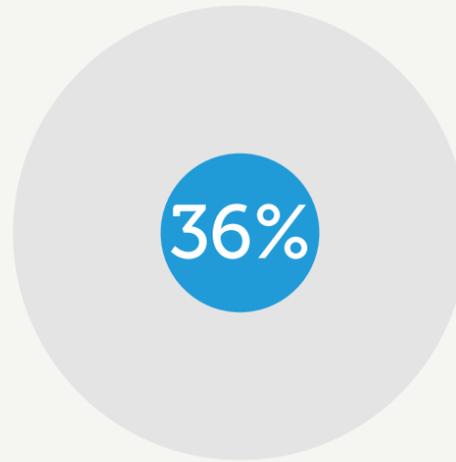
### 3.3 Client development



OF CLIENTS STATED THAT THEY ARE **NOT AWARE ENOUGH** OF THE WORK THEIR AGENCY IS DOING FOR OTHER CLIENTS



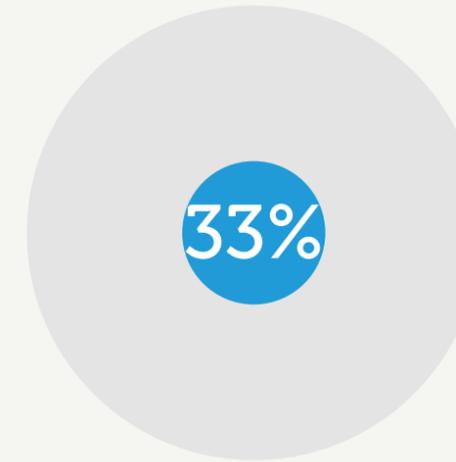
These clients are saying, 'Why isn't the agency proactively sharing more of this work? We're not asking them to share confidential information, but surely the agency has learning and insights that could be useful?'



OF CLIENTS WOULD LIKE TO BE CLEARER ABOUT WHAT THEIR AGENCY DOES **NOT DO**



In the clamour of agencies telling clients about their services, clients often find it refreshing when agencies are clear about the services they don't offer. It's relatively rare.



OF CLIENTS BELIEVE THAT DESIGN AGENCIES ARE SLIGHTLY **LESS PROACTIVE** THAN OTHER TYPES OF AGENCIES WHEN IT COMES TO CLIENT DEVELOPMENT



It's not about being aggressive or pushy, but spotting opportunities and making the effort.

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2.3 years – the average time since clients last saw a credentials presentation from their incumbent agency.

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# About Up to the Light

Up to the Light is the leading provider of client surveys to the UK design industry. The consultancy offers expert, objective and experienced advice for marketing services agencies and professional services firms. The consultancy's approach is to challenge ingrained assumptions and offer more effective, insight-led thinking.

This report is dependent on agencies commissioning Up to the Light to interview their clients. If you've found this report useful, then just imagine how insightful and valuable a bespoke survey with your clients will be. Do get in touch if you'd like to discuss a client survey for your agency.

## Services include:

- Client surveys
- Business development strategy
- Pitching advice
- Business differentiation
- Training & workshops
- Brand positioning & brand strategy for clients

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