

Gesamtverband



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# GWA Spring Monitor 2009

## Graphs

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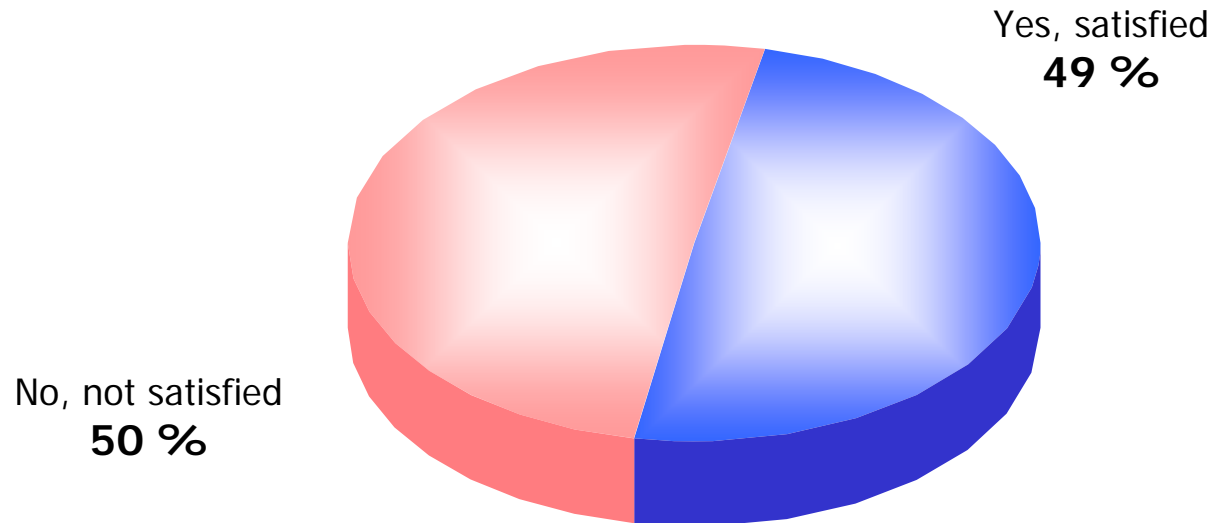


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## Revenues and returns in 2008: sector

# Satisfaction with growth in revenues for the agency sector is down

**Question:** Can the agency sector be satisfied with the growth in revenues in 2008?



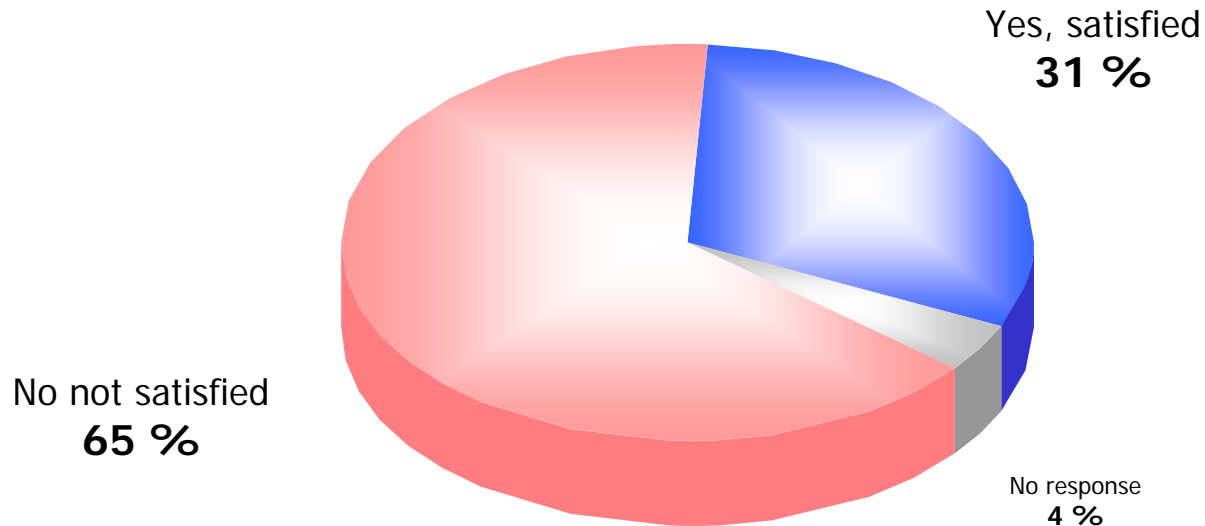
**Sample:**  
All agencies  
FM 2009 n=83

Figures in %

Difference from 100 % = no response / rounding differences

## Satisfaction with growth in returns for the agency sector also down

**Question:** Can the agency sector be satisfied with growth in returns in 2008?



**Sample:**  
All agencies  
FM 2009 n=83

Figures in %

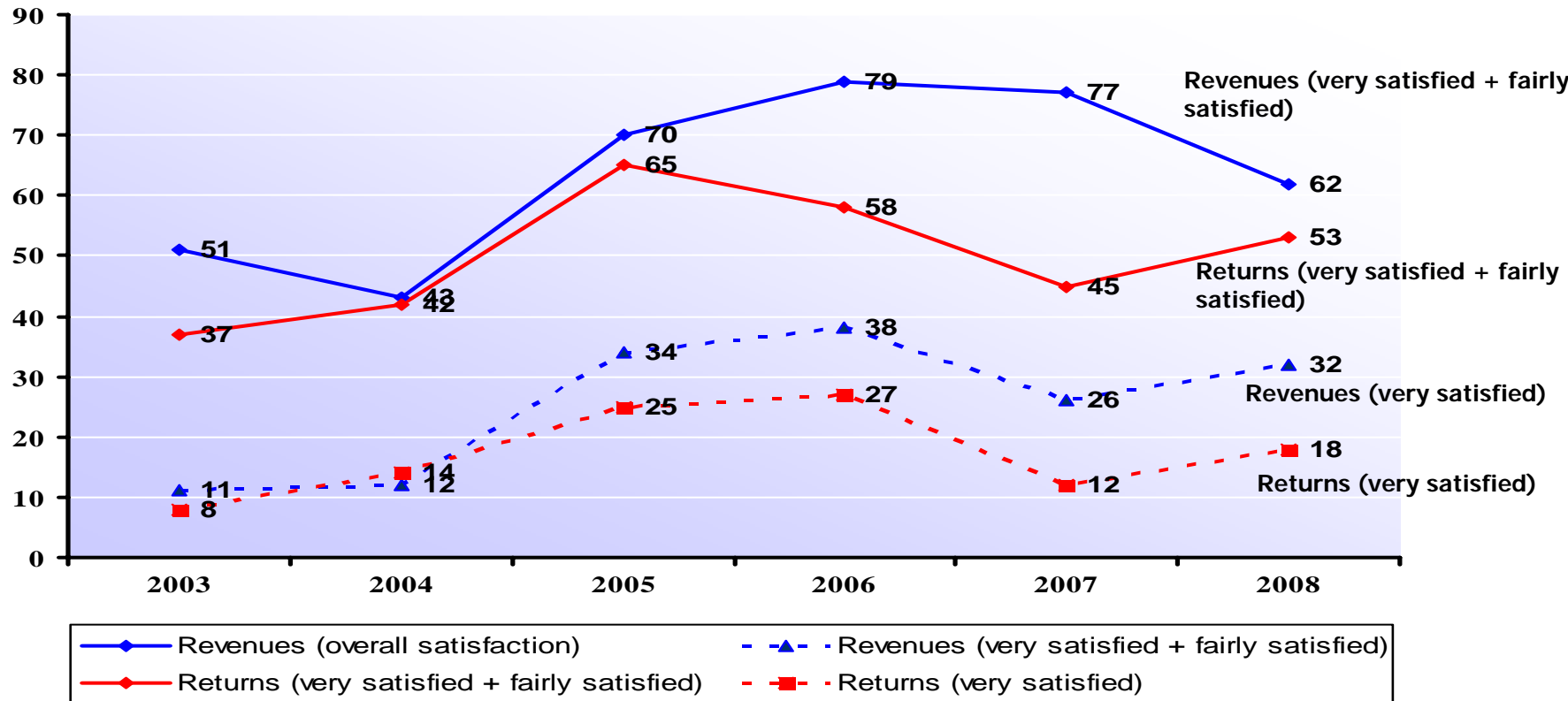
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## Revenues and returns 2008: own agency

# Satisfaction with revenues 2003 - 2008

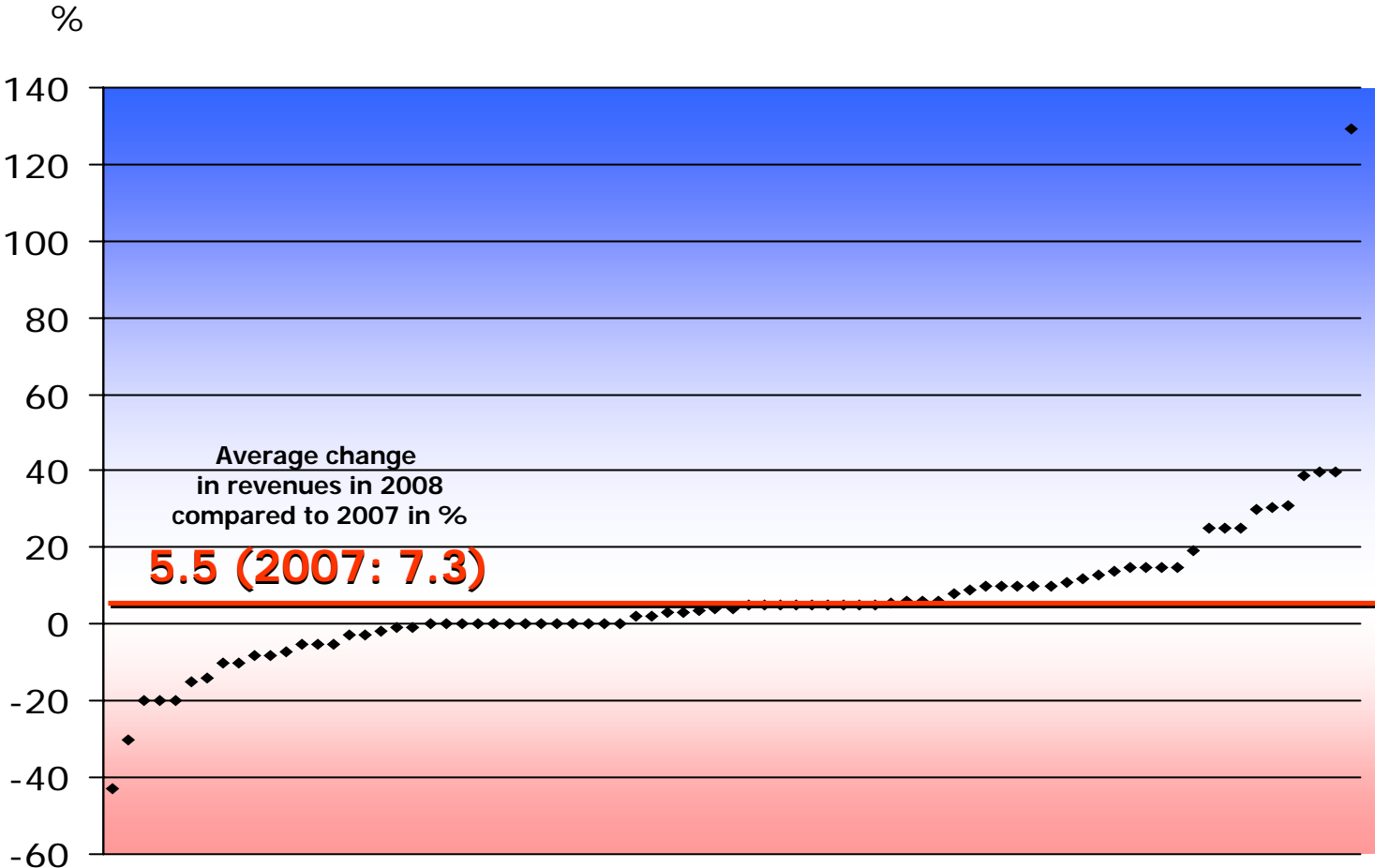


Source: GWA's own analysis

# GWA Agencies record average increase in revenues of 5.5% in 2008

**Question :** How did revenues for your agency change in 2008 as against 2007?

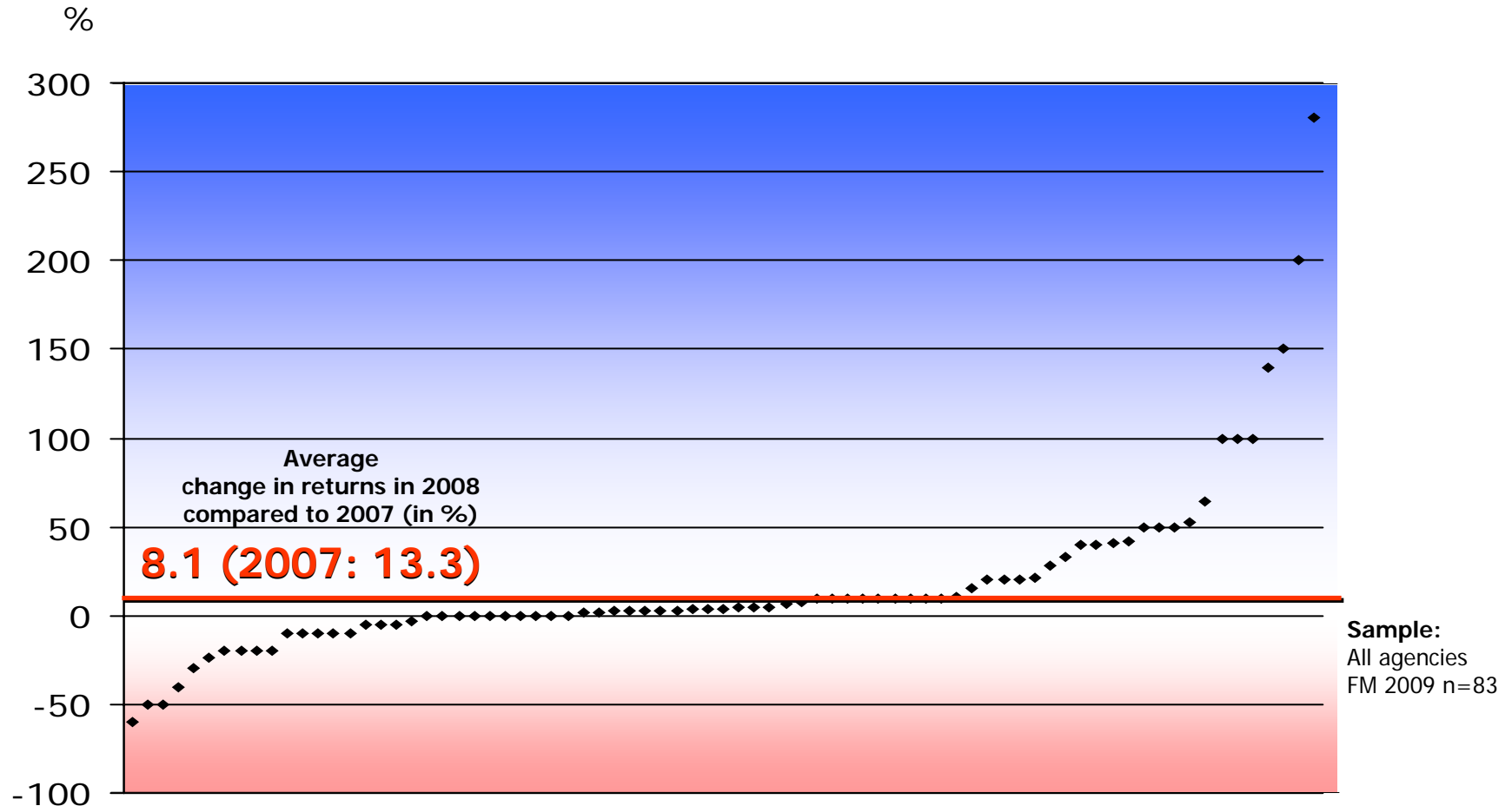
Please give a figure on the basis that 'total revenues for 2007 =100'.



**Sample:**  
All agencies  
FM 2009 n=83

# Own agency returns up by 8 per cent in 2008

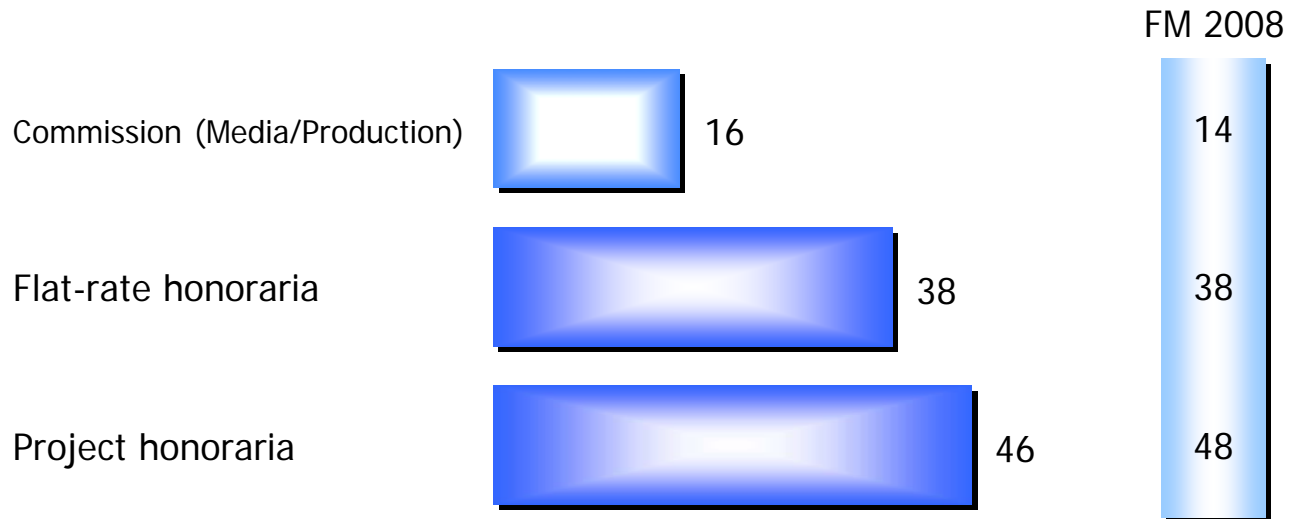
**Question :** How did returns for your agency (based on cross income) change in 2008 as against 2007? Please give a figure on the basis that 'returns for 2007 = 100'.



# Income structure remains unchanged

**Question:** How is the 2008 income of your agency made up?  
Please indicate percentages.

## Average in %



**Sample:**  
All agencies  
FM 2008 n=78  
FM 2009 n=83

Figures in %

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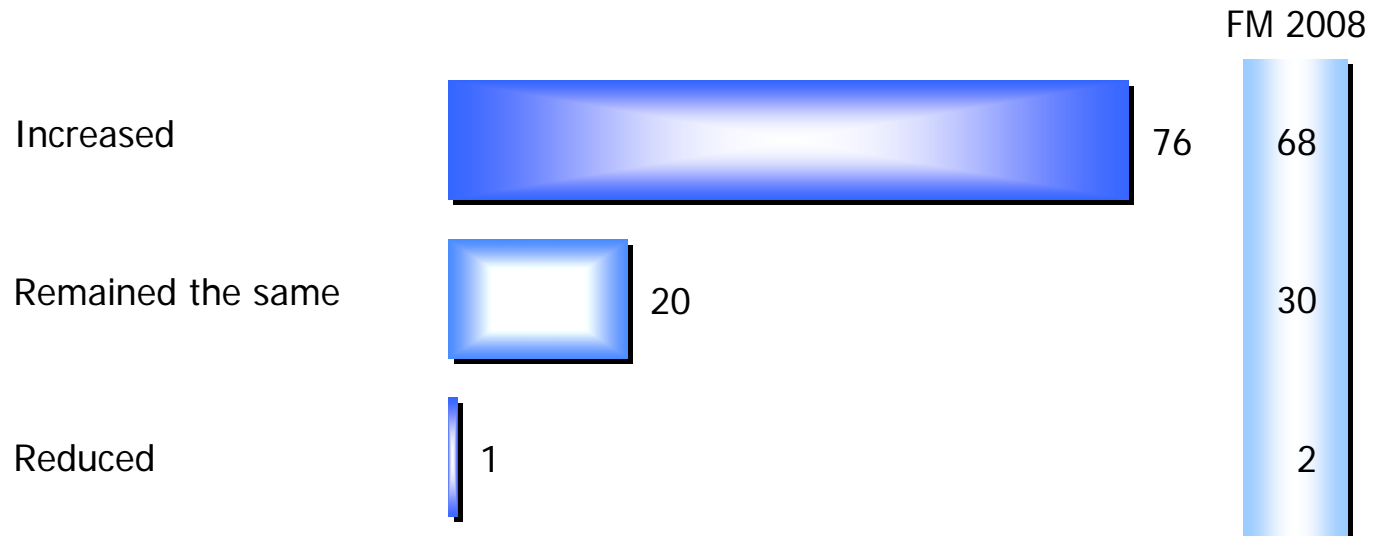


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# Changes in costs and staffing levels 2008

# Cost pressure rose in 2008 in the majority of agencies

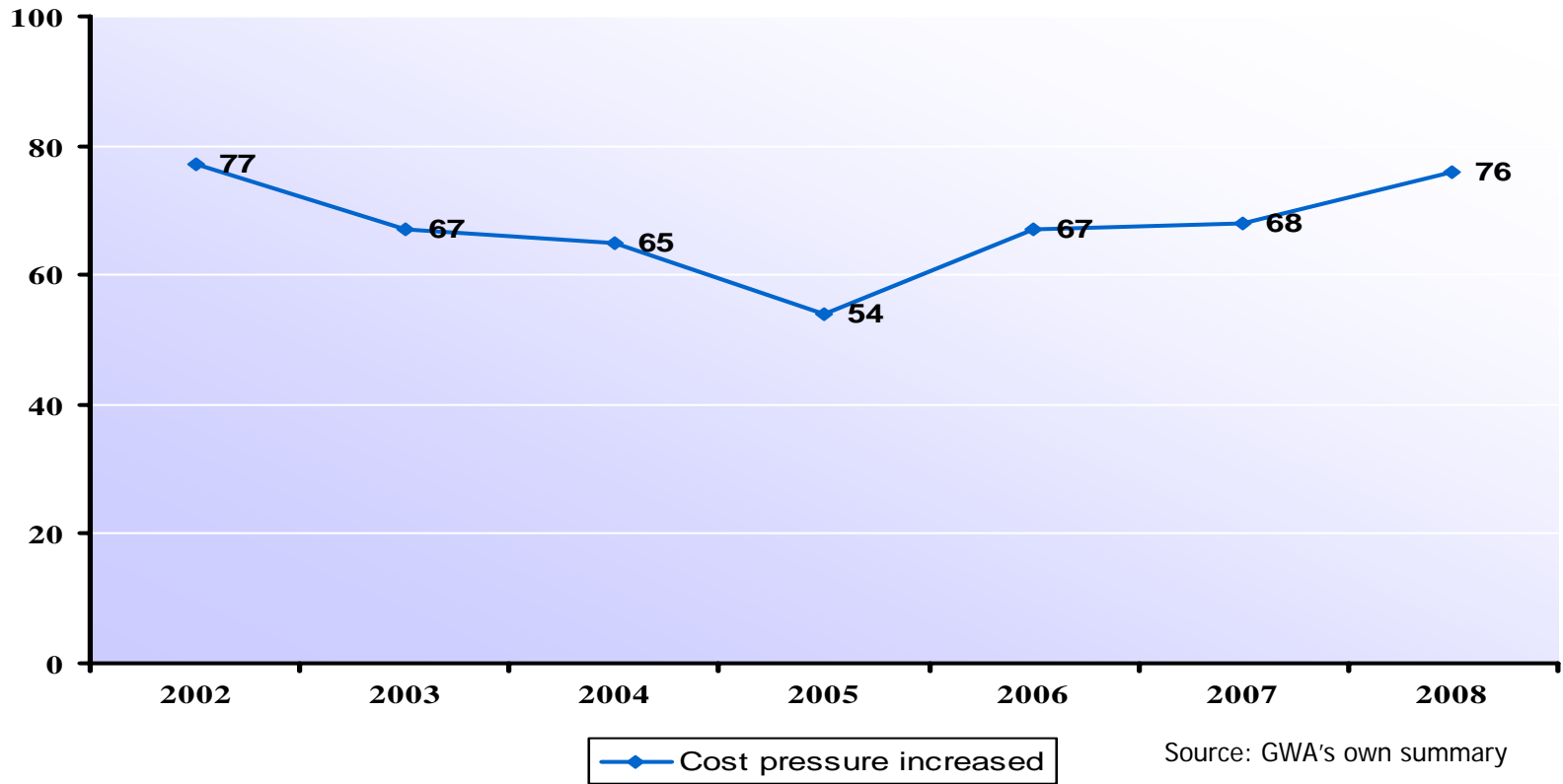
**Question :** How has cost pressure impacted on your agency in 2008 compared with 2007?



**Sample:**  
All agencies  
FM 2008 n=78  
FM 2009 n=83

Figures in %

# Cost pressure 2002 - 2008



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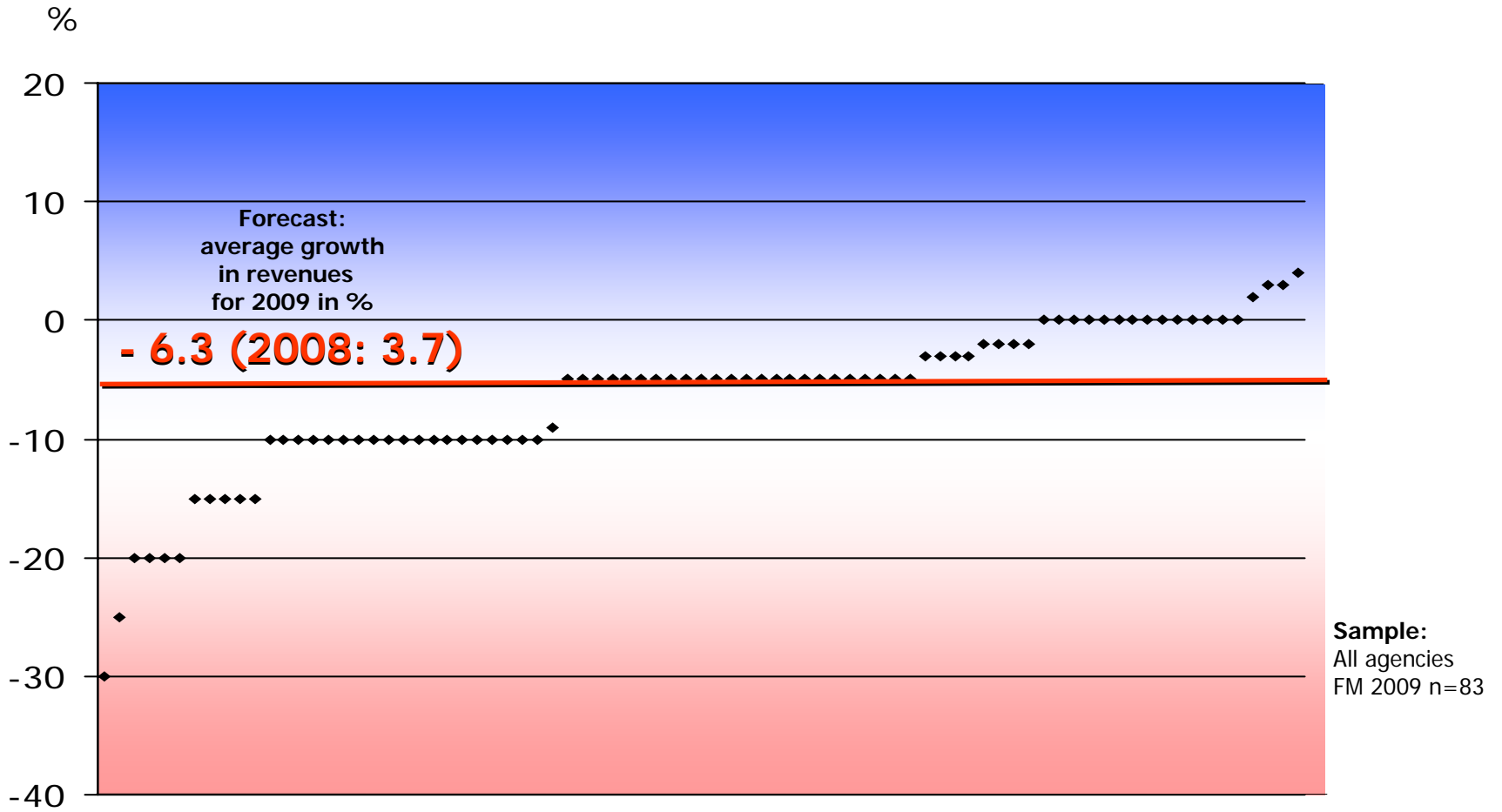


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## Forecast for 2009: sector as a whole

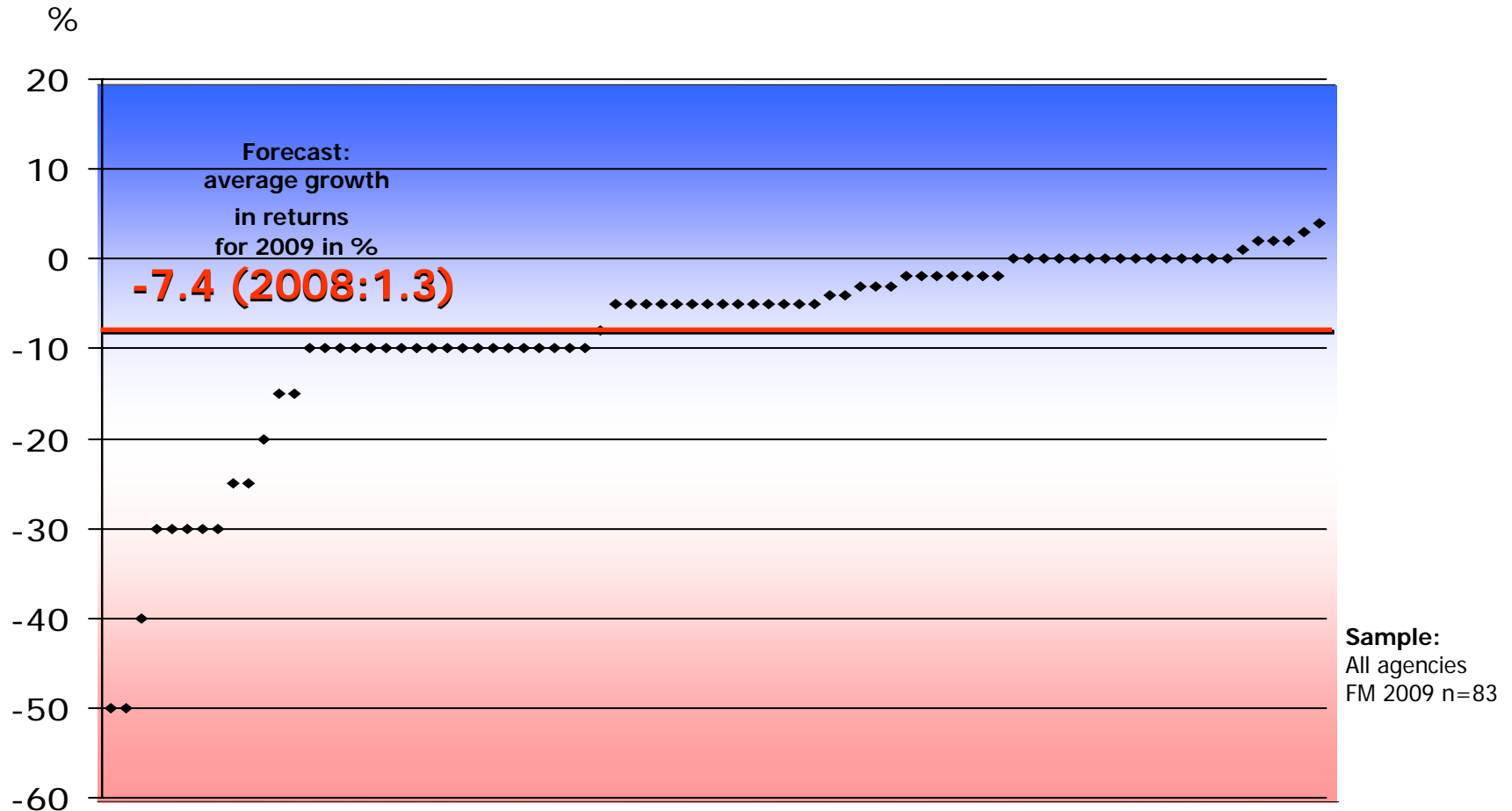
# Forecast: growth in revenues for the agency sector overall in 2009

**Question:** What level of revenues do you anticipate for the agency sector overall in 2009?  
Please give a figure on the basis that the previous year = 100.



# Forecast: growth in returns for the agency sector overall in 2009

**Question:** What level of returns (based on cross income) do you anticipate for the agency sector overall in 2009. Please give a figure on the basis that the previous year = 100.



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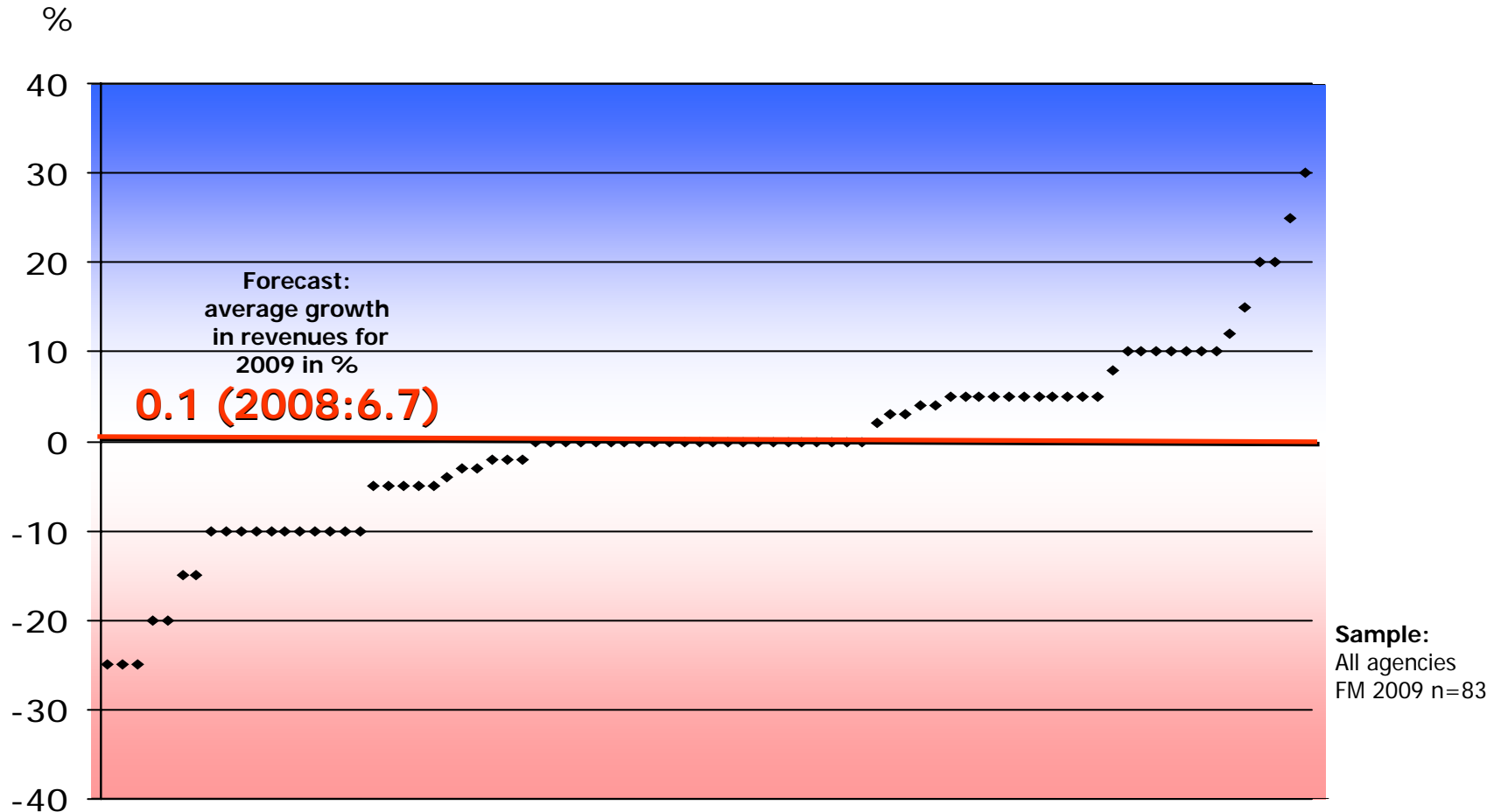


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## Forecast for 2009: own agency

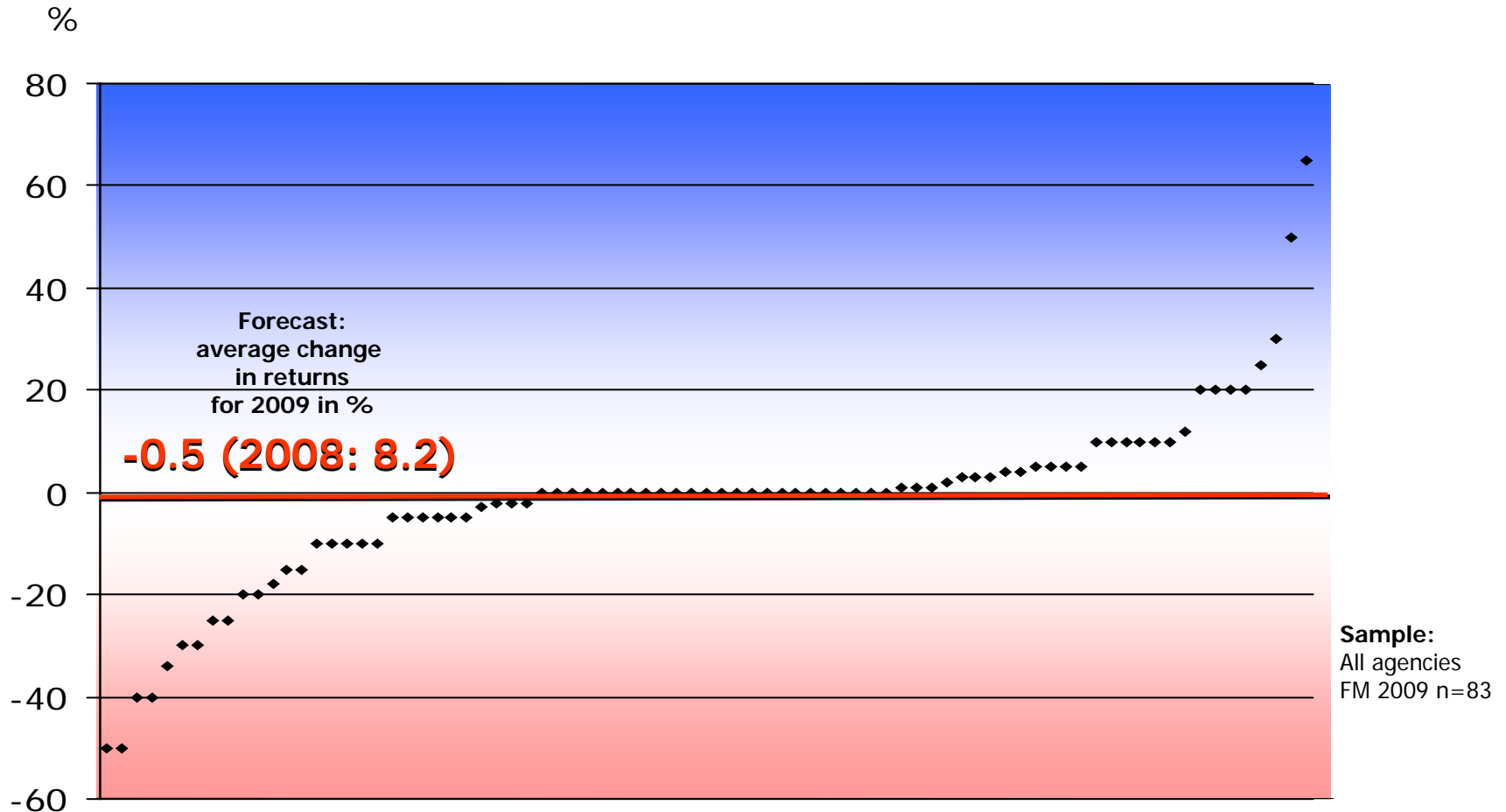
## 2009: No change in revenues for own agency

**Question :** What level of revenues do you anticipate for your agency over the whole of 2009?  
Please give a figure on the basis that 'total revenues for 2008 = 100'



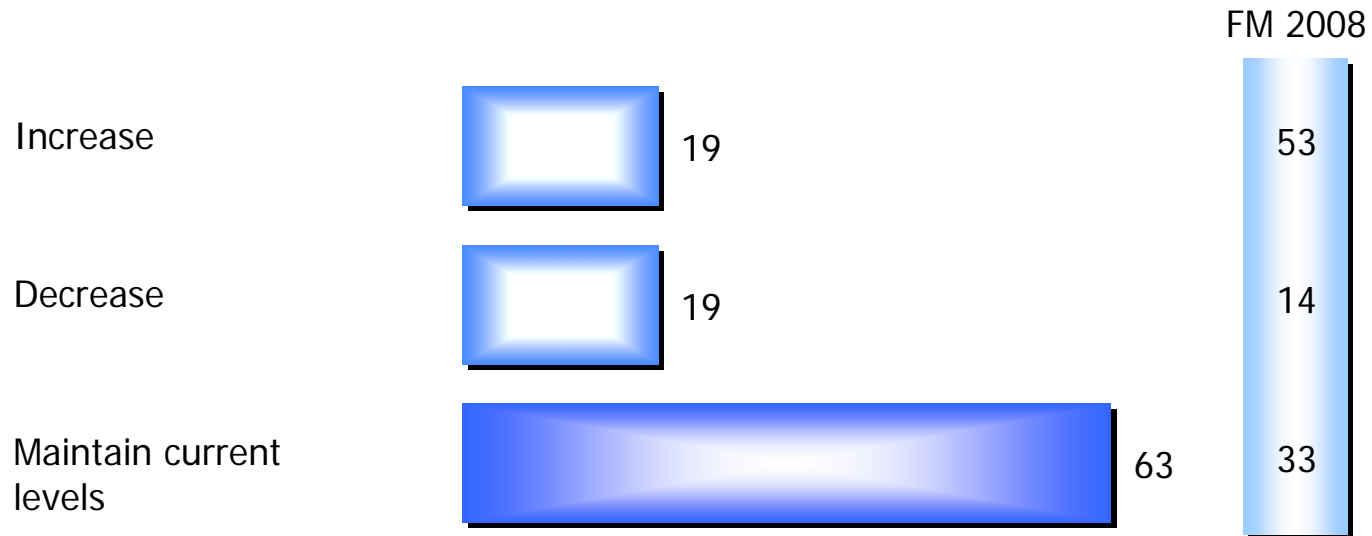
## No change in returns for own agency either

**Question :** And what level of returns (based on cross income) do you anticipate for your agency over the whole of 2009? Please give a figure on the basis that 'returns for 2008 = 100'



# Overall, no reduction in staffing levels is to be expected

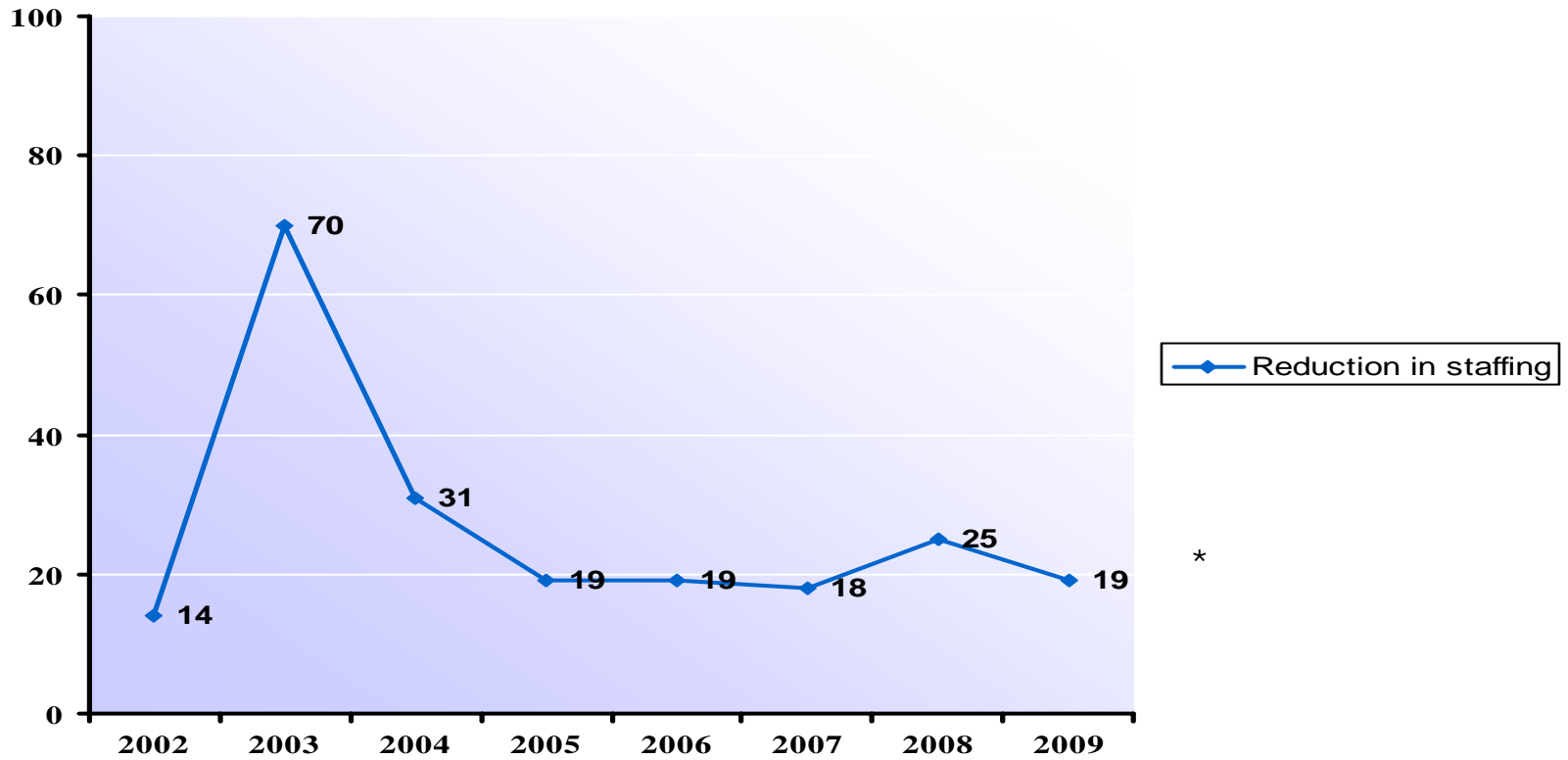
**Question :** What are your plans for 2009 in terms of staffing changes?



**Sample:**  
All agencies  
FM 2008 n=78  
FM 2009 n=83

Figures in %

# Percentage of agencies that have reduced staffing levels 2004 - 2009



Source: GWA's own summary

\* Forecast for 2009