

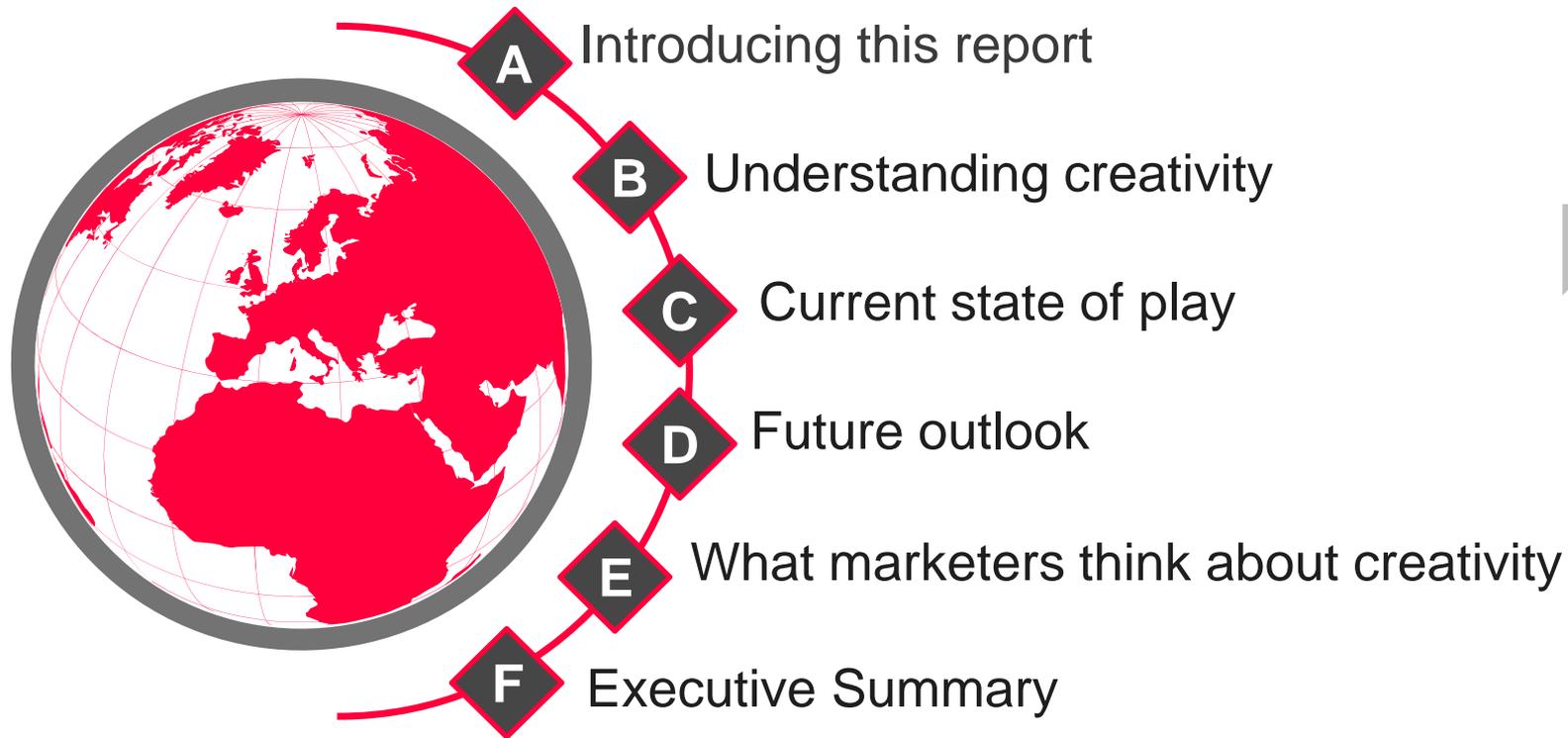


# Clients and creativity

Survey Results: Spain

In partnership with  
Spanish Association of Advertisers | Asociación Española de Anunciantes (AEA)

# Agenda



*“Everyone who’s accountable to build value for a brand should bring a great degree of passion for creativity; new ideas that push the envelope and the possibility of what the brand can mean in the mind of consumers.”*

**Vicky Free,**  
Head of Global Marketing



# Introducing this report



## Context

*The world's first global study (we believe) focused specifically on **clients' role in the seemingly terminal decline of creativity in marketing and advertising**. Exploring the client-centric barriers to creativity and what to do about it to reverse the decline.*

*This initiative aims **to help brand owners address, and reverse, the decline in creativity in marketing communications**. Not for the sake of some high-minded love of creative industries, but from a need to help drive sustainable brand growth.*

## Objectives

*The goal of this project is not to go over old ground or duplicate the excellent work which already exists. We feel there is an opportunity in*

- 1. Focusing specifically on clients and their role in declining creativity*
- 2. Exploring where the barriers and opportunities lie at an organisation level*
- 3. Include an emphasis on the local nature of creativity i.e. the world is our focus but we know it wasn't created with a cookie cutter (the best work is often local)*



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# Thank you to the 11 Global CMOs and Creative Executives who informed our initiative



**VICKY FREE**  
Head of Global Marketing



**CARL JOHNSON**  
Founding Partner &  
Executive Chairman



**PATRICIA CORSI**  
Chief Marketing, Digital  
& Information Officer



**ANDY NAIRN**  
Founding Partner



**MARLEE JAYME**  
Chief Creative Officer  
APAC



**SIR JOHN HEGARTY**  
Co-Founder &  
Creative Director



**MARTA GARCIA ALONSO**  
Global Director Brand  
Building Transformation



**DAVID GOLDING**  
Strategist &  
Founding Partner



**JOHN SCHOOLCRAFT**  
Global Chief Creative Officer



**NATALIE LAM**  
Chief Creative Officer  
APAC & MEA



**TIFFANY ROALFE**  
Global Chief Creative Officer

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# What we did

In partnership with our national association members, [Contagious](#) and [The Observatory International](#), [WFA](#) conducted a global research to explore the gaps, challenges and opportunities in the creativity space and how to best address them:



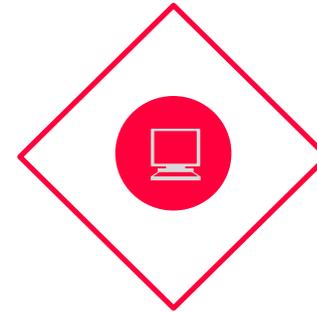
**11**

In-depth, qualitative interviews with leading industry leaders, both clients and creative agencies



**34**

National associations engaged in delivering a truly global project

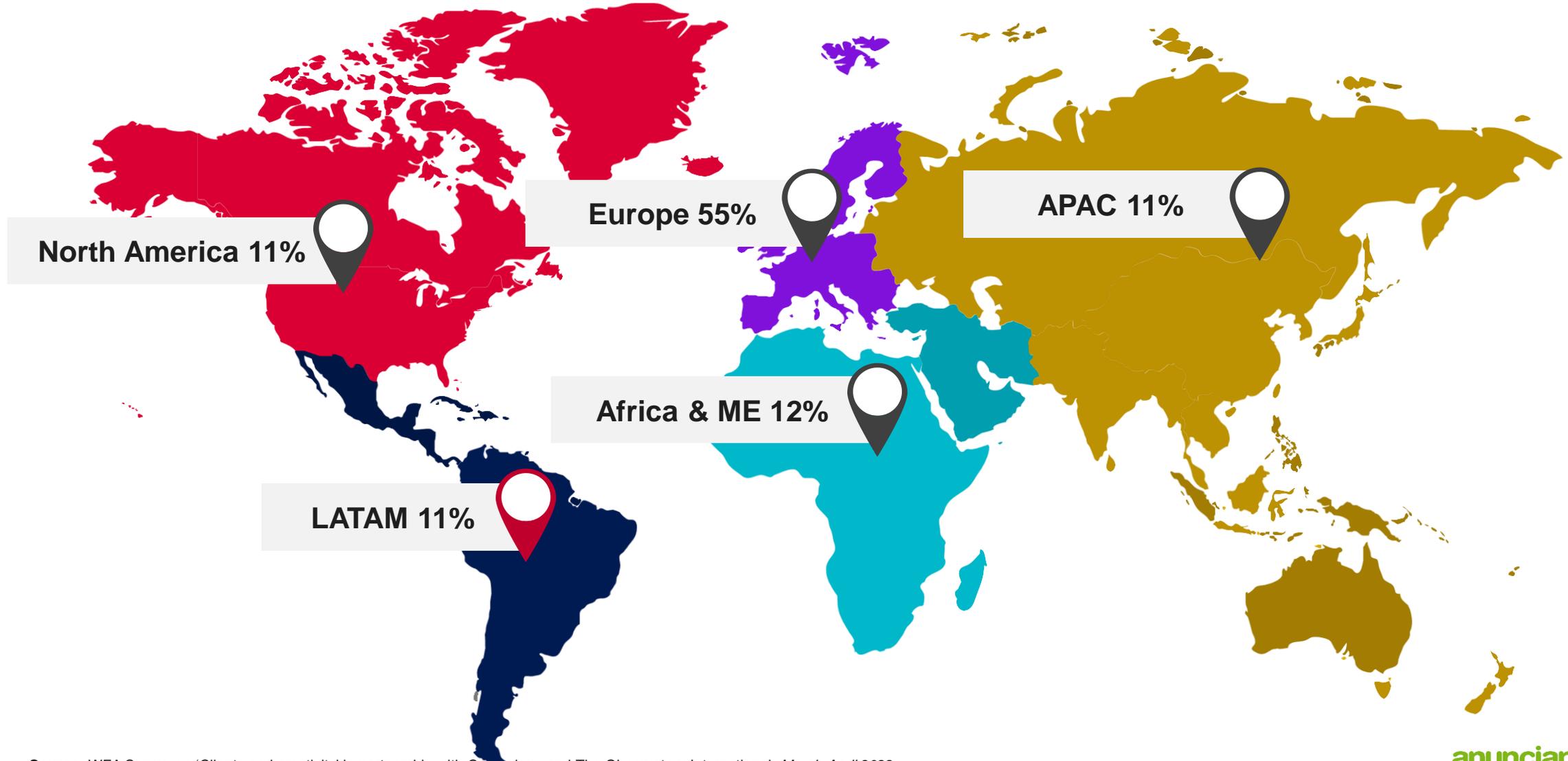


**640**

Online survey responses from senior marketers across the globe

*The findings in this report highlight what client-side marketers need to be mindful of, and how the WFA plans to help the industry going forward*

# Global sample thanks to 34 WFA national associations

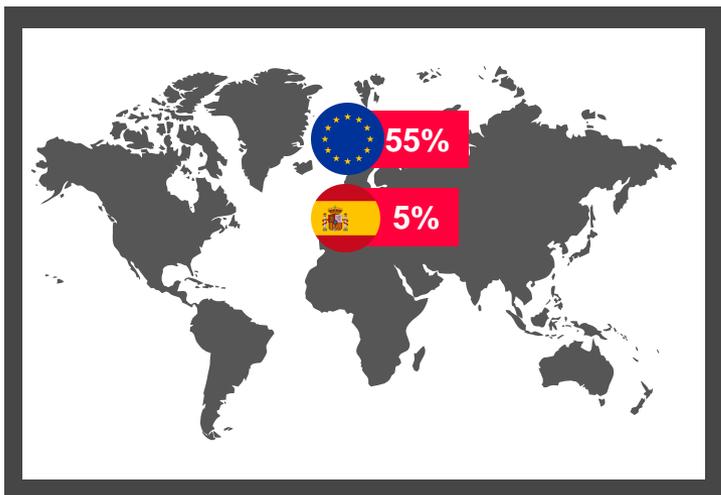


Source: WFA Survey on 'Clients and creativity' in partnership with Convergious and The Observatory International, March-April 2022;  
Global Base: 640 respondents from 34 countries



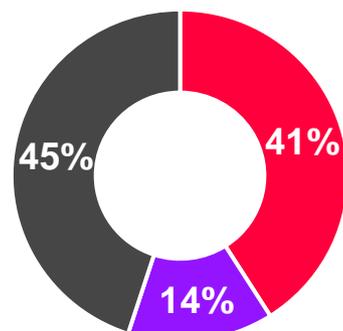
# Who did we interview?

## Sample profile (company level)



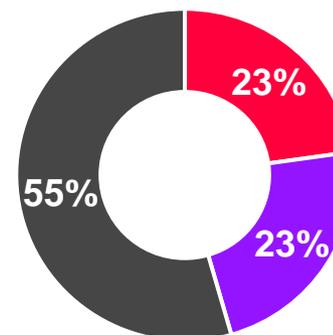
Calculated out of total sample

### Business Focus



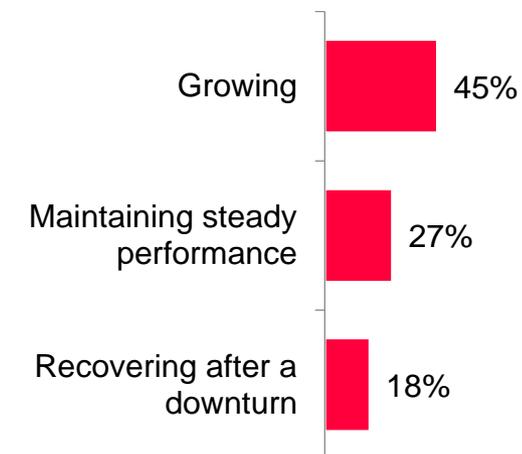
- Business to Consumer
- Business to Business
- Both

### Company size (by no. of employees)



- Small (< 1000 empl.)
- Medium (1000-5,000 empl.)
- Large (> 5,000 empl.)

### Current business performance



### Company sector



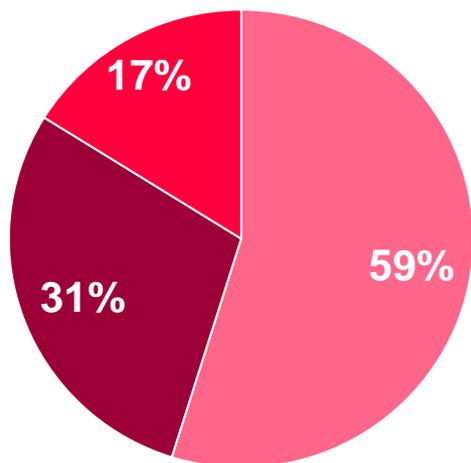
Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;  
Global Base: 640 | Europe Base: 349 | Spain Base: 29 respondents



# Who did we interview?

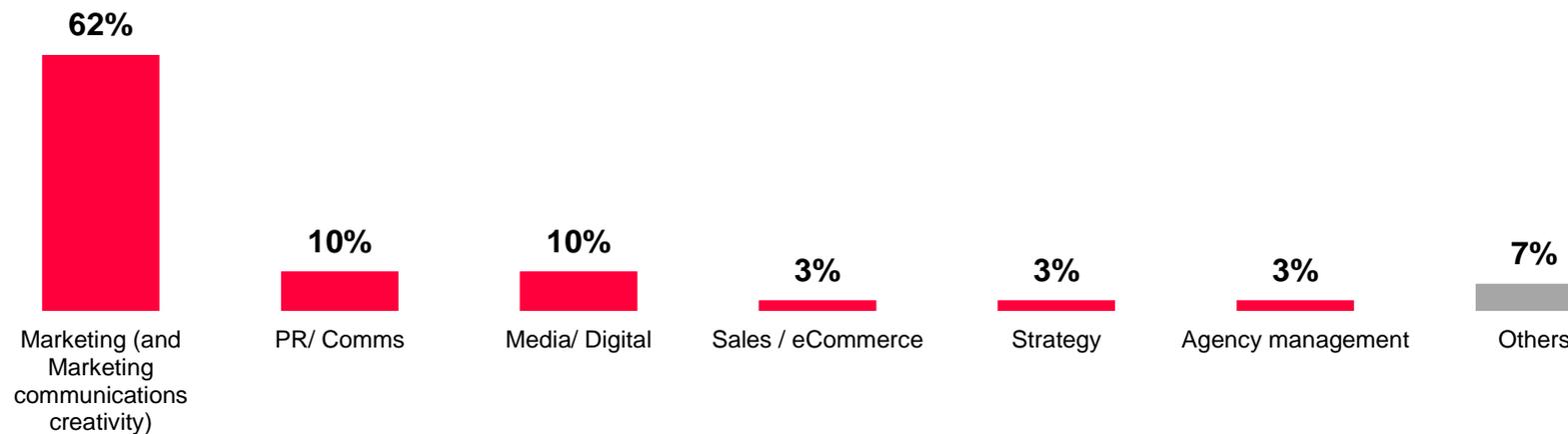
## Sample profile (respondent level)

### Respondent's remit



- National
- Regional / Multi-national
- Global

### Business roles (multiple choice possible)



# How to read the norms

This report illustrates the results at 3 levels:

- Country deep-dive (🇪🇸)
- Europe norm (🇪🇺)
- Global norm (🌍)



## How are the differences highlighted?

Where the results in Spain are statistically significant higher/ lower than the Global (or regional) norm, the % is highlighted by arrows, as following:

↑↓ Arrows indicate a regional/ global significantly higher / lower value than Spain (at Confidence interval 95%)

# Understanding what creativity is today

- ✓ Marketers' definition
- ✓ Importance for business
- ✓ Maturity journey



# What do marketers understand by CREATIVITY?

For Spanish marketers, creativity is a **fundamental tool that transmits the company's values and messages** abroad for various purposes, the **competitive advantage** that helps the **business to grow**.

## In Spanish marketers' words...



“A **fundamental tool** that transmits the **company's values and messages** abroad for various purposes: achieving brand affinity, positioning ourselves in the consumer's mind, increasing sales, publicizing the Company's products and services...”

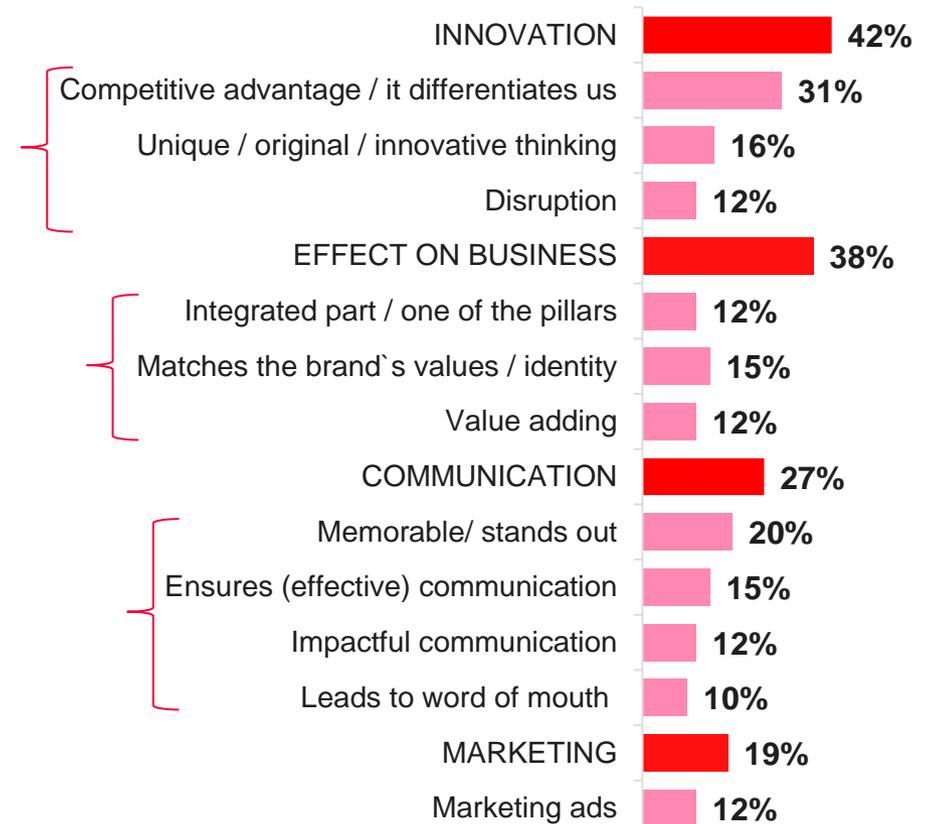
“It is the way in which we seek to make our **communications innovative and original** in order to reach our target, thus arousing their interest, not only to push them to buy our products, but also to recommend them.”

“Generation of **motivating ideas for consumption** and the positive relationship with our brands and our company.”

“Look for **innovative elements in brand building**, from strategy to execution. Look for surprise, notoriety, differentiation, relevance...”

“Creativity is a **competitive advantage** that makes the business grow.”

## What does creativity mean to you? (Open answers)



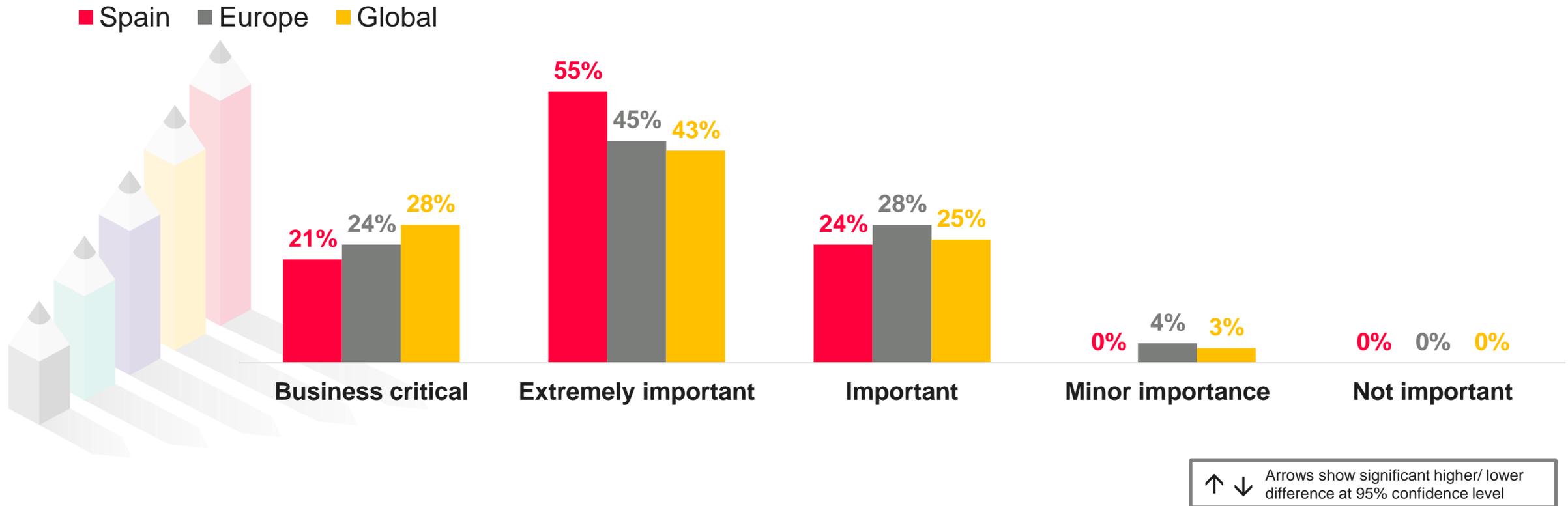
Only mentions higher than 10% are represented

B2. How would you say creativity is defined within your organisation? Open ended answer

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022; Global Base: 640 | Europe Base: 349 | Spain Base: 29 respondents

# For 76%, CREATIVITY is extremely important/ critical

All interviewed senior Spanish marketers see the importance of creativity, with 1 in 5 ranking it as 'business critical'. The results are aligned with European and global benchmarks.



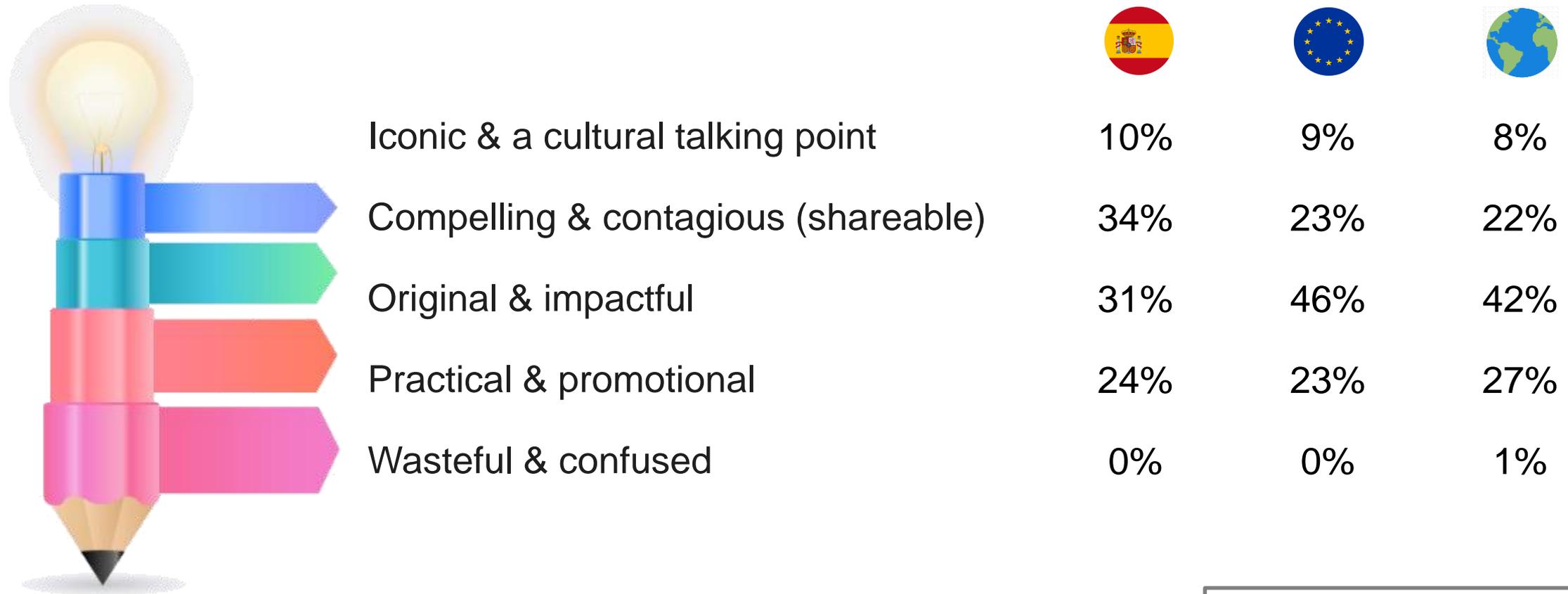
B1: How important is marketing communications creativity for your organisation? *Single answer*

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, *March-April 2022*;

Global Base: 640 | Europe Base: 349 | Spain Base: 29 respondents

# 34% appreciate their work as 'Compelling & contagious'

1 in 3 interviewed Spanish marketers think their organisation's MarCom creativity is 'Compelling and contagious' (indicatively higher than their European and global counterparts), while one quarter see it as 'practical and promotional'.



**B3: Which of the following most closely reflects how your organisation is performing in terms of marketing communications creativity? Single answer**

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Global Base: 640 | Europe Base: 349 | Spain Base: 29 respondents

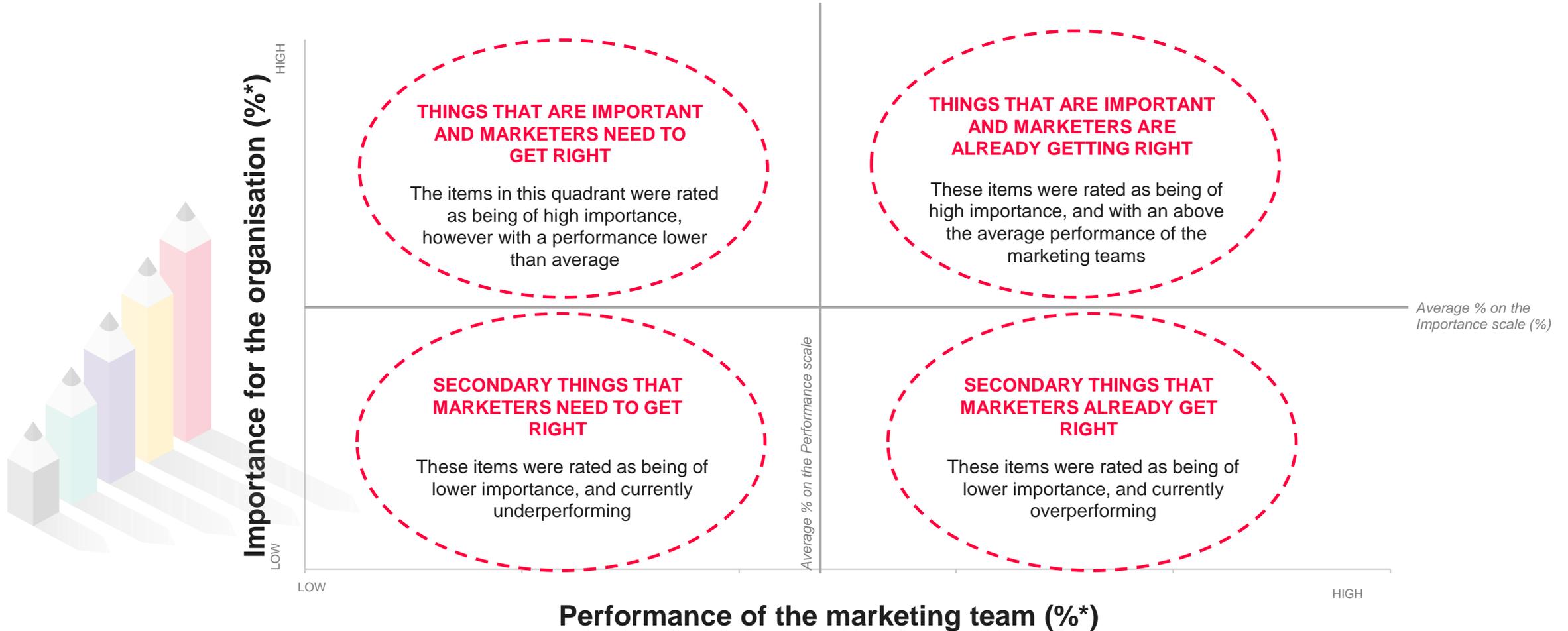
↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

## Current state of play

- ✓ Current performance in creativity
- ✓ The global - local pendulum
- ✓ Partners selection



# Gap analysis – *How to read*



\*This analysis include the % sum of 4 + 5 on a 5 points scale



# Performance in creativity – Spain focus

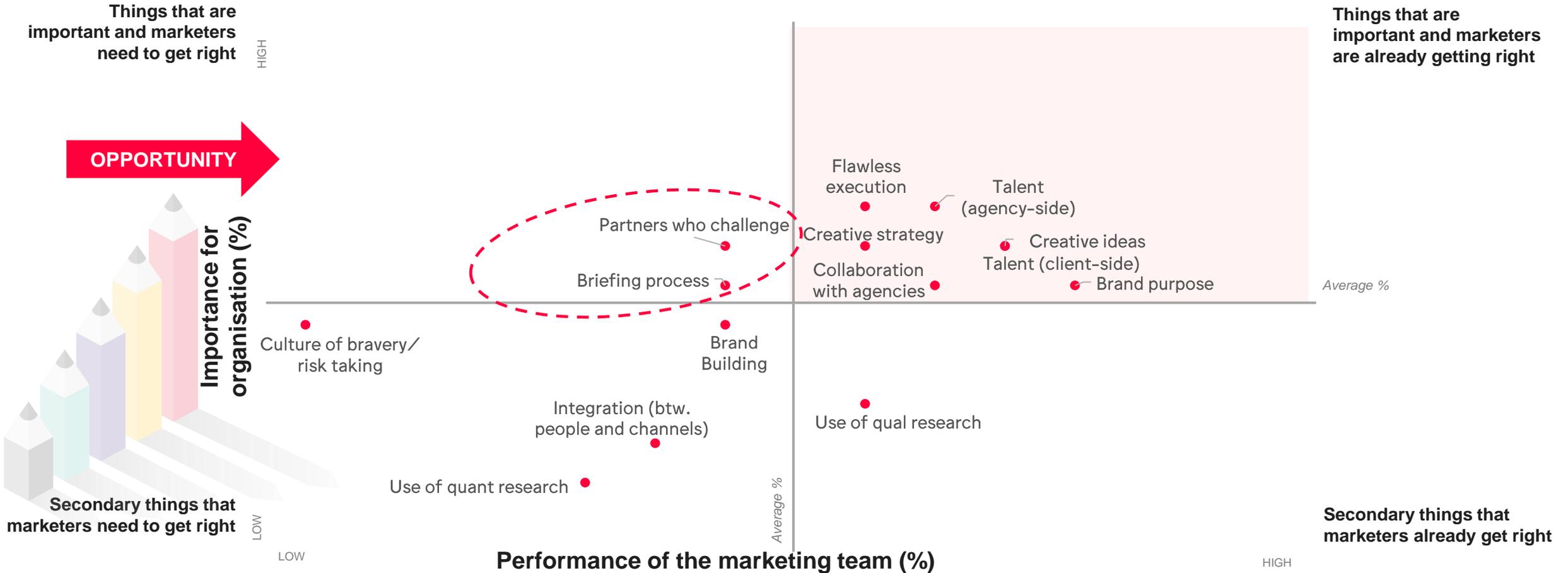


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

C1. How much importance would you place on the following in terms of becoming a more creative organisation? *Single answer on a 5 points scale*

C2. How would you say your organisation performs in relation to the following? *Single answer on a 5 points scale*

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Spain Base: 29 respondents



# Performance in creativity – Europe benchmark

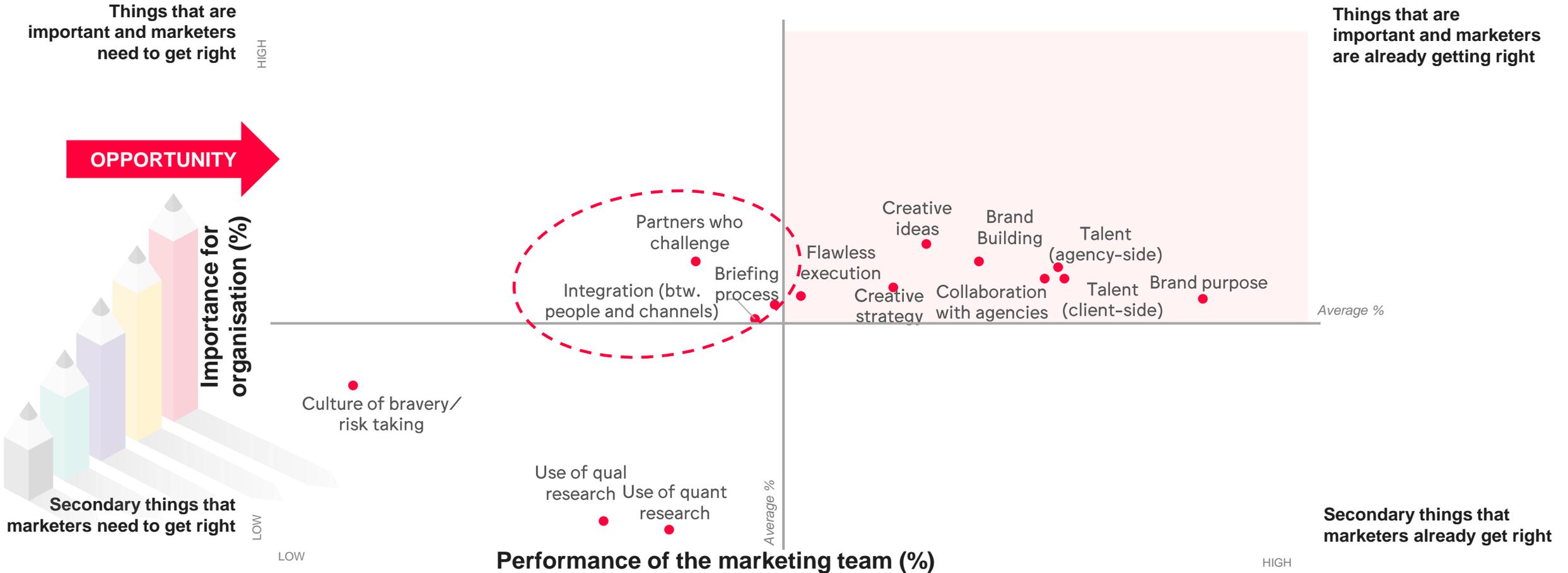


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

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C2. How would you say your organisation performs in relation to the following? *Single answer on a 5 points scale*

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Europe Base: 349 respondents



# Performance in creativity – Global benchmark

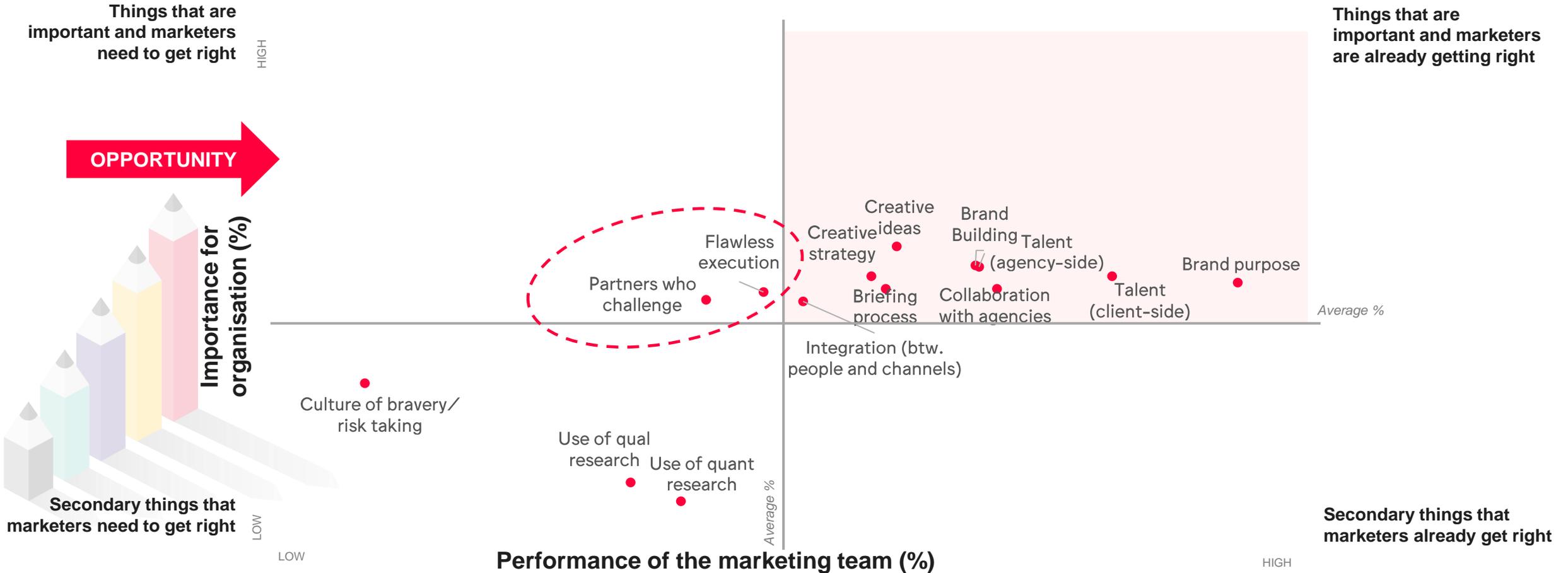


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

C1. How much importance would you place on the following in terms of becoming a more creative organisation? *Single answer on a 5 points scale*

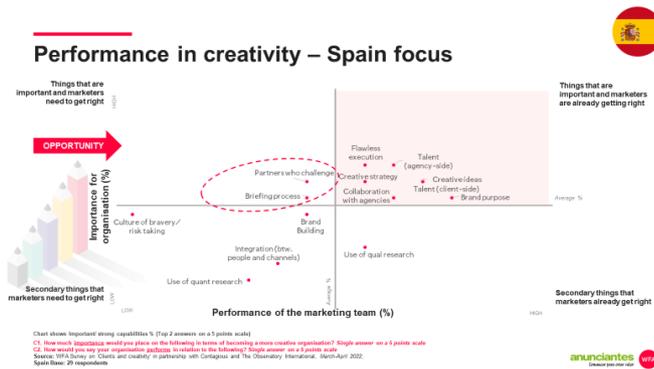
C2. How would you say your organisation performs in relation to the following? *Single answer on a 5 points scale*

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

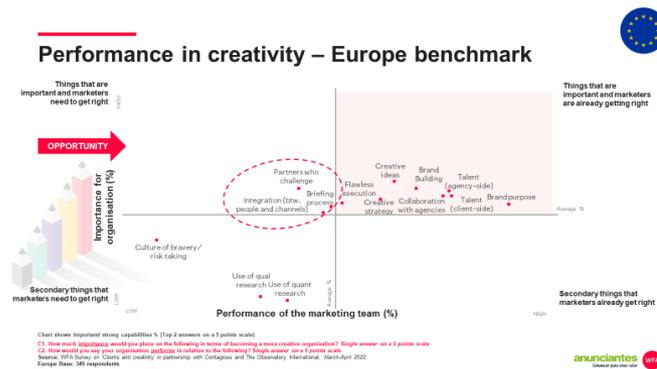
Global Base: 640 respondents

# Gap analysis – Key learnings for Spain

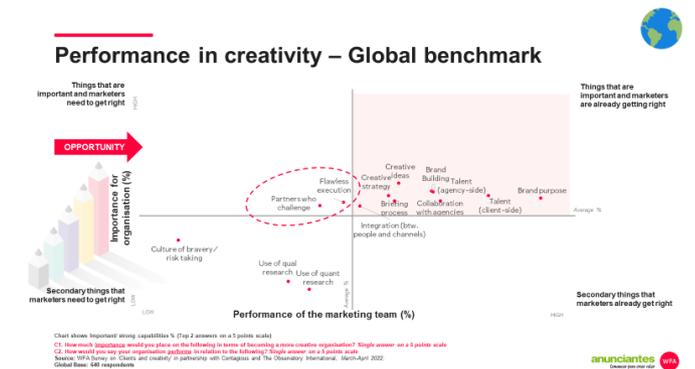
## Performance in creativity – Spain



## Performance in creativity – Europe benchmark



## Performance in creativity – Global benchmark



## Where does Spain stand versus regional and global norms?

Senior marketers from Spain are confident that their organisation's performance is above average on several important aspects – **creative strategy and ideas, brand purpose, talent, flawless execution and collaboration with agencies.**

However, finding **partners who challenge** and a better **briefing process** constitute areas for improvement – in line with other markets from Europe or globally.

Interestingly, **bravery/risk taking** is seen of less importance, similarly to Europe and Global levels.

C1. How much importance would you place on the following in terms of becoming a more creative organisation? Single answer on a 5 points scale

C2. How would you say your organisation performs in relation to the following? Single answer on a 5 points scale

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Spain Base: 29 respondents

# Thoughts on improving creativity

01

Higher focus on creative process (brief, execution, measure results)

02

Take risks and bold decisions

03

Execution is fundamental

04

Improve collaboration with agencies

05

Prioritize creativity over short-term sales / ROI



## In Spanish marketers' words...

“To create a campaign, all the steps from start to finish are important (from the beginning with the elaboration of the briefing to the final production of parts for the launch; but it is important that the campaign does not end here: it is also important to measure results over time of validity of the campaign in case adjustments have to be made, such as at the end of the campaign to assess results and always obtain points for learning and improvement in the future.”

“I think that in general the agencies, although they are very talented, do not fully listen to the client, who knows the brand well, the target, in some way they detract from what the client can contribute to generate better publicity. Clever advertising, enjoy. I also think that we could work much more collaboratively, between the client and the agency, and go beyond the currently established processes that are perhaps obsolete.”

“Thinking long-term and thinking strategically often collides with the culture of the organisation (general management).”

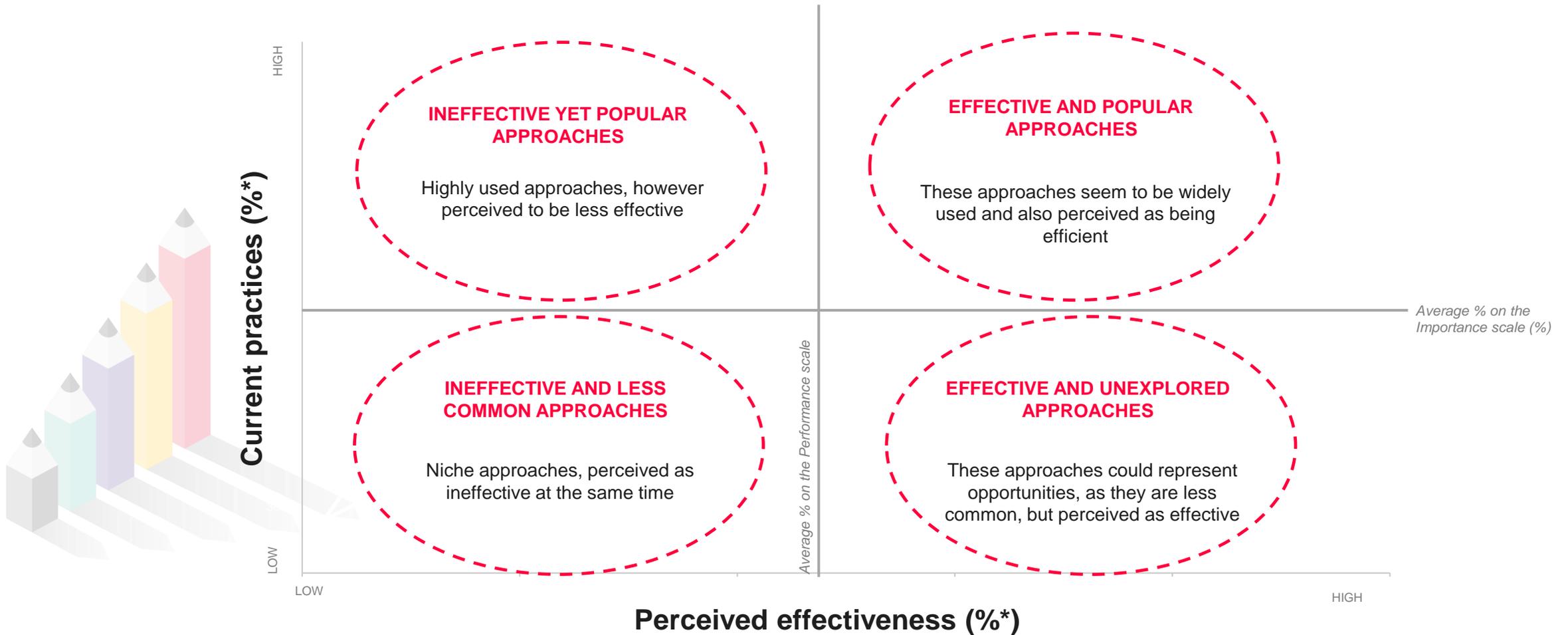
“We want to build a creative culture, but the day-to-day and short-term goals make it difficult.”

C3. Would you like to explain/ expand on your previous choices – to become a more creative organisation? *Open ended answer*

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, *March-April 2022*;

Spain Base: 29 respondents

# Global-local opportunities mapping – *How to read*



\*This analysis include the % sum of 4 + 5 on a 5 points scale



# Global-local opportunities mapping – Spain focus

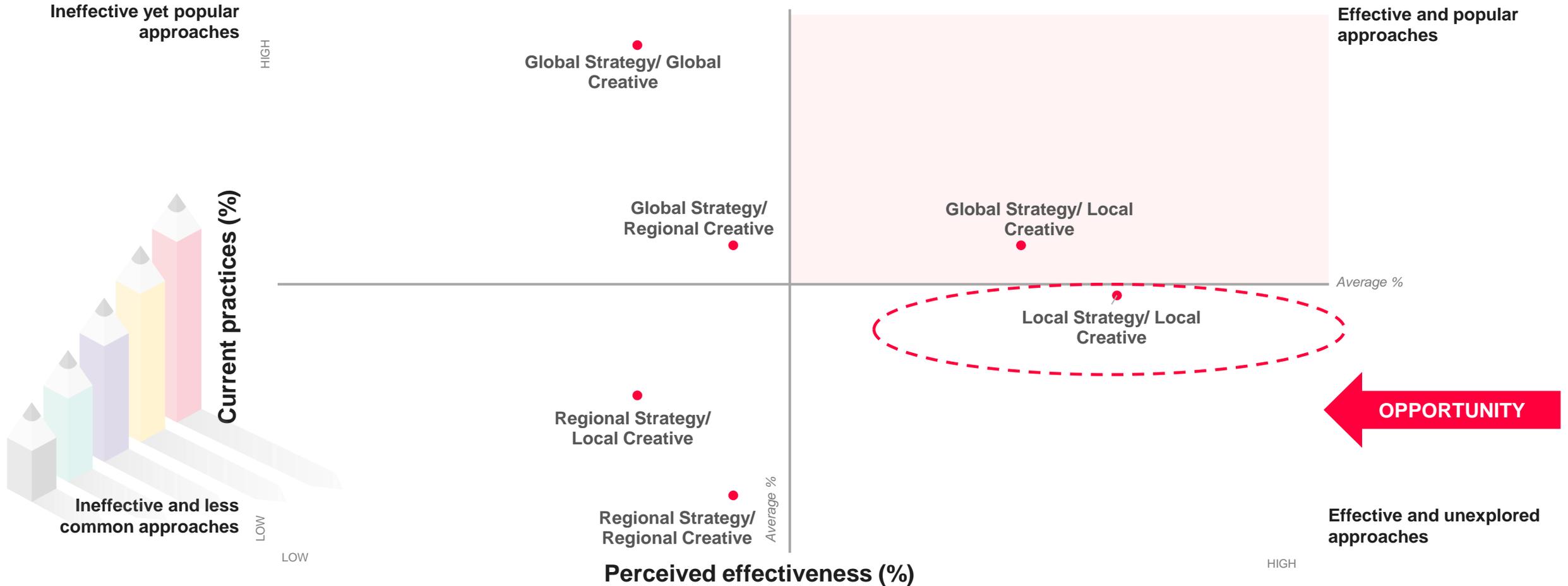


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

C6. Thinking about your creative process, what approach(es) do you generally use in your organisation? Single answer on a 5 points scale

C7. How effective do you generally believe these to be (not specifically for your organisation)? Single answer on a 5 points scale

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Spain Base: 29 respondents



# Global-local opportunities mapping – Europe benchmark

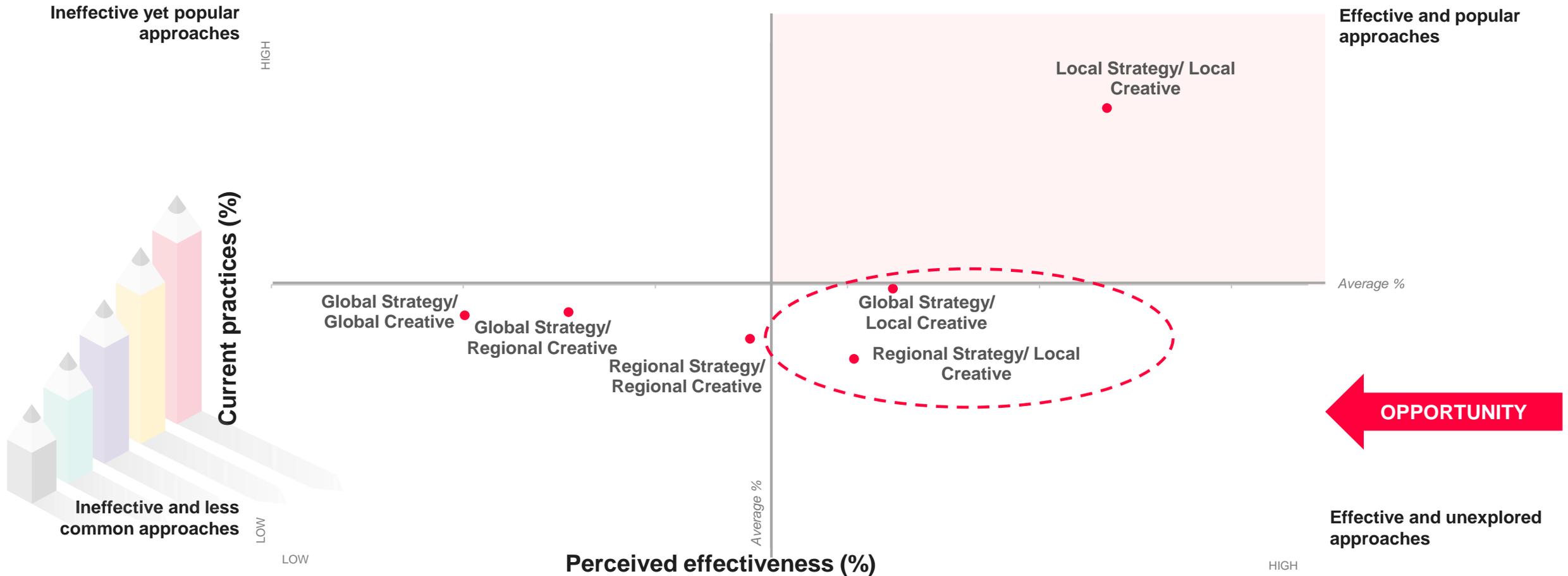


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

C6. Thinking about your creative process, what approach(es) do you generally use in your organisation? Single answer on a 5 points scale

C7. How effective do you generally believe these to be (not specifically for your organisation)? Single answer on a 5 points scale

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Greece Base: 40 respondents



# Global-local opportunities mapping – Global benchmark

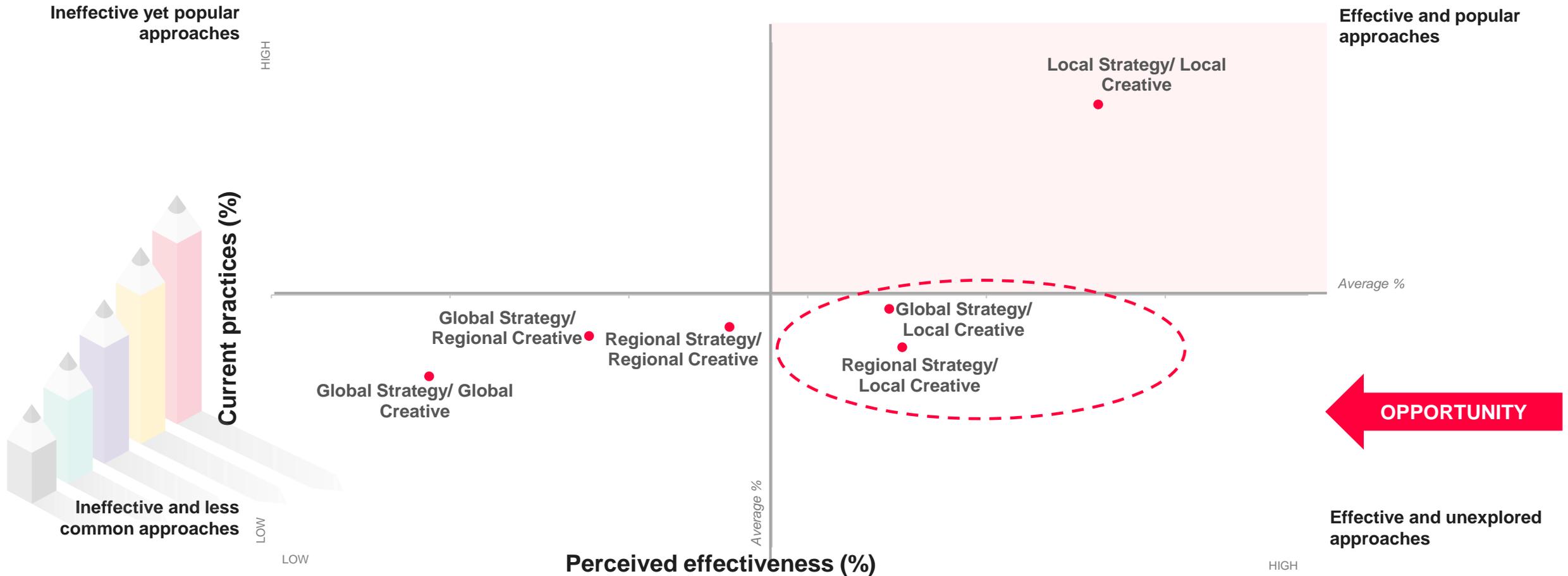


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

C6. Thinking about your creative process, what approach(es) do you generally use in your organisation? Single answer on a 5 points scale

C7. How effective do you generally believe these to be (not specifically for your organisation)? Single answer on a 5 points scale

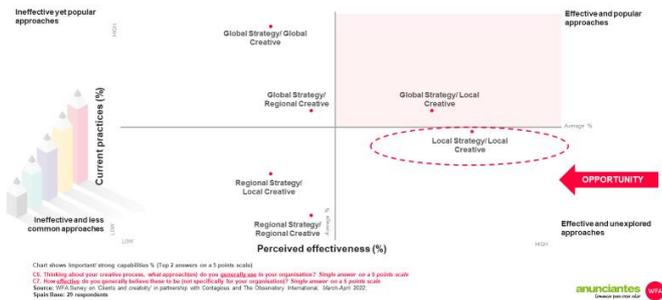
Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Greece Base: 40 respondents

# Gap analysis – Key learnings for Spain

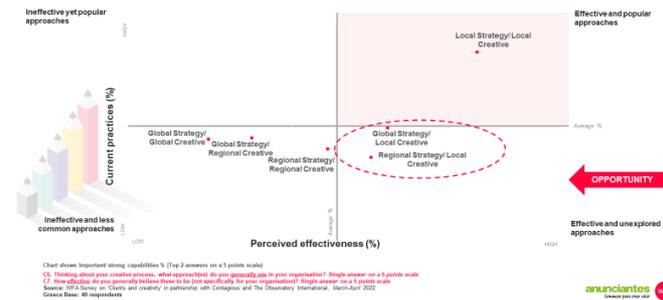
## Global-local opportunities – Spain

### Global-local opportunities mapping – Spain focus



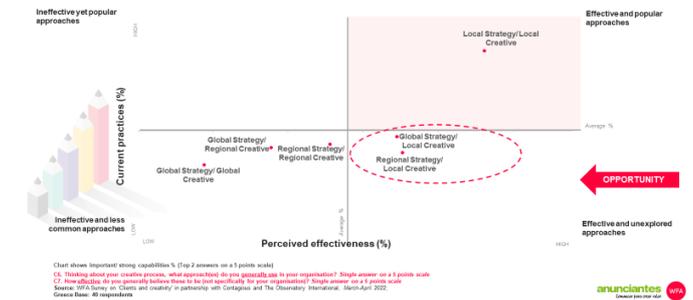
## Global-local opportunities – Europe benchmark

### Global-local opportunities mapping – Europe benchmark



## Global-local opportunities – Global benchmark

### Global-local opportunities mapping – Global benchmark



## Where does Spain stand versus regional and global norms?

**Local Strategy - Local Creative** is the most **effective** and **popular** creative process approach followed in Europe and worldwide and this constitutes an opportunity for Spanish organisations.

Currently most popular approach used by Spanish organisations is **Global Strategy - Local Creative**.

C6. Thinking about your creative process, what approach(es) do you generally use in your organisation? Single answer on a 5 points scale

C7. How effective do you generally believe these to be (not specifically for your organisation)? Single answer on a 5 points scale

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Spain Base: 29 respondents

# Improving the creativity global-local strategy

**01** Global strategy and local creative / local - alignment

**02** Local strategy and local execution

**03** More trust/freedom in local creativity

**04** Balance between consistency and adaptability

**05** Global & regional strategy and creative



## In Spanish marketers' words...

“Once the global strategy is defined and understood, more trust should be placed in local creativity adapted to the culture and customs of the country in question.”

“With a global strategy and local creativity where there is a local team focused on creativity, to be able to implement the plans from creativity.”

“With an organisation that encompasses sociologists, philosophers and communication professionals in the process of generating communication strategies, and that the decision-making process is such and not influenced by the existing hierarchies.”

“Clearly defined global strategy that allows the necessary segmentation afterwards (local, regional, etc.).”

“Balance between consistency and adaptability; with agility but always based on a clear strategy.”

“Global positioning, local execution with enough autonomy. Greater risk that execution begins to be centralized.”

“A global team and regional teams running campaigns. It's everyone's way to build a cohesive brand without losing out on local touch.”

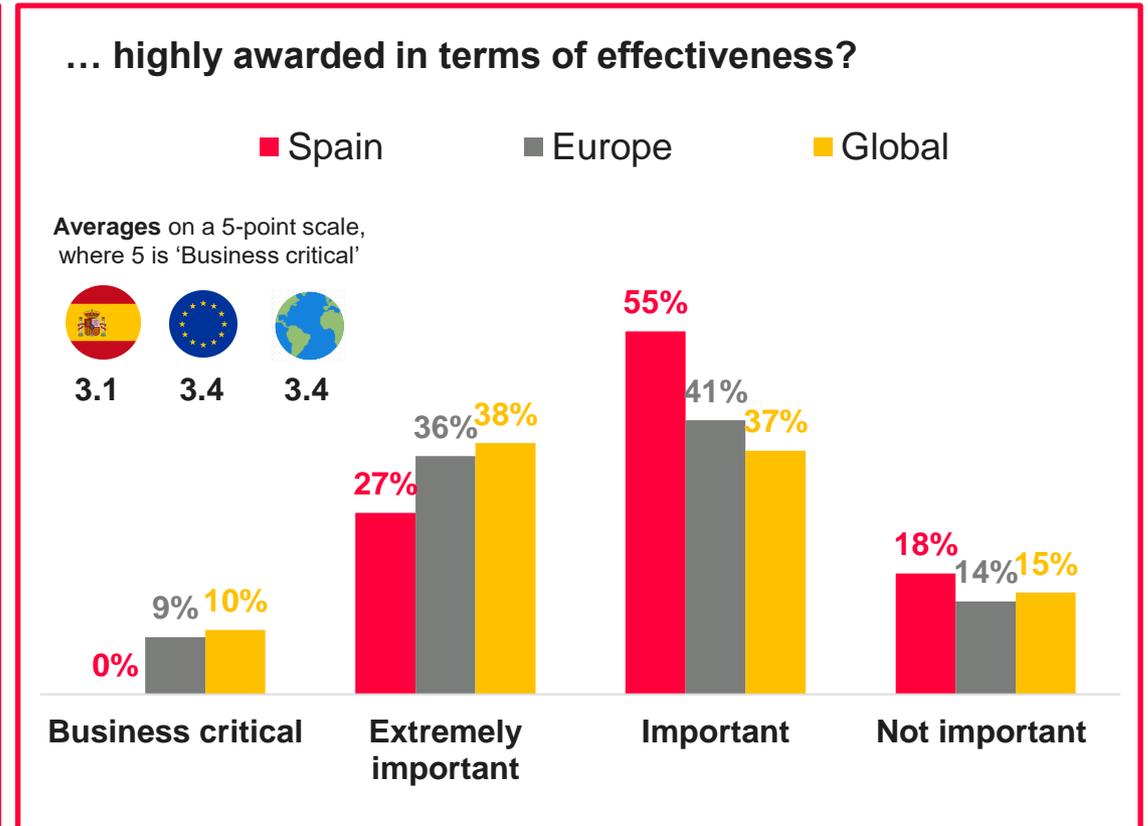
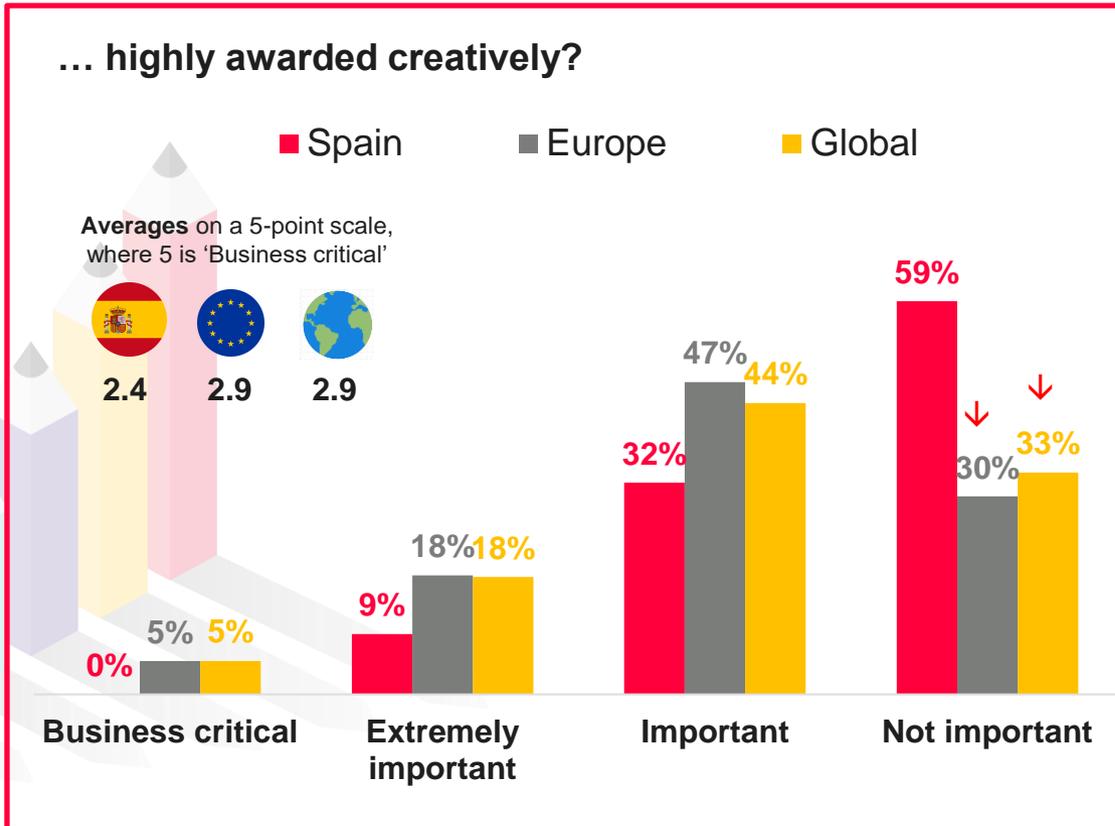
**C8. Given the opportunity, how would you like to structure and why? Open ended answer**

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Spain Base: 29 respondents

# Partners selection: creativity or effectiveness?

Client-side marketers admit they put more importance on the effectiveness of their agency partners, above the creative awards. For most interviewed Spanish marketers, whether the agencies have been awarded for their creativity is not a key decision factor when choosing their partners.



↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

E1: How important is it to work with agencies that are...? *Single answer*

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Global Base: 640 | Europe Base: 349 | Spain Base: 29 respondents

## Future outlook:

- ✓ Today's challenges
- ✓ Main opportunities

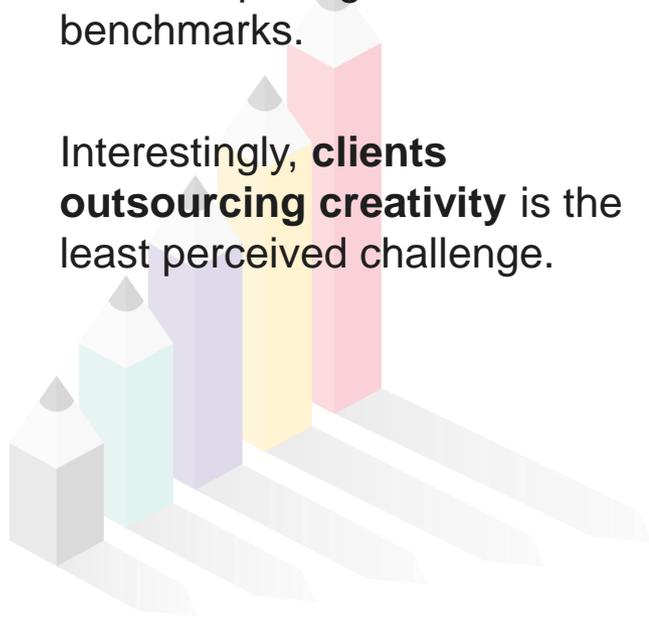


# Barriers to creativity...



**Short-termism, budget cuts and risk averse culture** are most mentioned barriers for creativity today in Spain – in line with Europe & global benchmarks.

Interestingly, **clients outsourcing creativity** is the least perceived challenge.



Short-term focus	54%	53%	48%
Budget cuts	42%	41%	40%
Risk averse culture	42%	50%	51%
Lack of demonstrable proof of the impact of creativity/ poor measurement	33%	27%	30%
Too many decision-makers in the creative process/unclear responsibilities	29%	39%	44%
Marketing procurement focused on savings	29%	17%	23%
Lack of talent (within agencies' organisations)	29%	25%	29%
Lack of belief in creativity	29%	20%	24%
Need for 'more for less'	25%	27%	30%
Lack of talent (within client organisation)	25%	21%	23%
Over-emphasis on efficiencies	21%	24%	26%
Over-emphasis on data and analytics	21%	22%	21%
Increased investment in digital channels (including programmatic)	17%	18%	17%
Increasingly tightly defined target audiences	8%	8%	9%
Clients outsourcing creativity	8%	5%	6%

C5: Which would you say are the main barriers to becoming a more creative (and effective) client? Multiple answer

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;  
Global Base: 640 | Europe Base: 349 | Spain Base: 29 respondents



Arrows show significant higher/ lower difference at 95% confidence level

**anunciantes**  
Comunicar para crear valor



# ... And solutions



Most Spanish marketers believe that **improving their understanding of the consumer** and **the ways of working between people** are the solutions to increase creativity in their organisations, in line with Europe and global results.

In their vision, **working with external suppliers** could also help, more so than in other markets from Europe or worldwide.

Improving our understanding of the customer	50%	47%	51%
Improving ways of working between people (internally and externally)	45%	51%	49%
Improving our briefing process	41%	46%	50%
Improving our ability to judge creativity	41%	43%	45%
Working with external suppliers but bringing some aspects of creativity in-house	41%	21%↓	21%↓
Increased emphasis on the working with the right external partners	36%	36%	36%
Improving our customer experience	23%	32%	34%
Improvement/ re-design of our brand(s) purpose	23%	27%	29%
More de-centralisation of our creative process (more emphasis on local)	23%	17%	21%
Bringing creativity in-house	14%	16%	17%
Less reliance on pressure/link testing work (including pre post testing of creative)	14%	10%	9%
Increased emphasis on improved measurement	14%	17%	23%
More centralisation of creative process (more emphasis on global/ regional)	9%	11%	13%

D1: Which of the following will you focus on to help make your organisation more creative? *Multiple answer*

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022; Global Base: 640 | Europe Base: 349 | Spain Base: 29 respondents



Arrows show significant higher/ lower difference at 95% confidence level

**anunciantes**  
Comunicar para crear valor





# What marketers think about creativity

- ✓ General attitudes
- ✓ Who does it well?



# 68% agree creativity is marketing's super-power

Majority of Spanish marketers agree that **Creativity is marketing's super-power** - yet, comparing the results with the European and Global norms, the agreement level is directionally lower in Spain.

Moreover, fewer Spanish marketers included in our sample agree that **creativity is the most valuable contribution marketing can make** towards tackling the world's problems, as compared to global level.

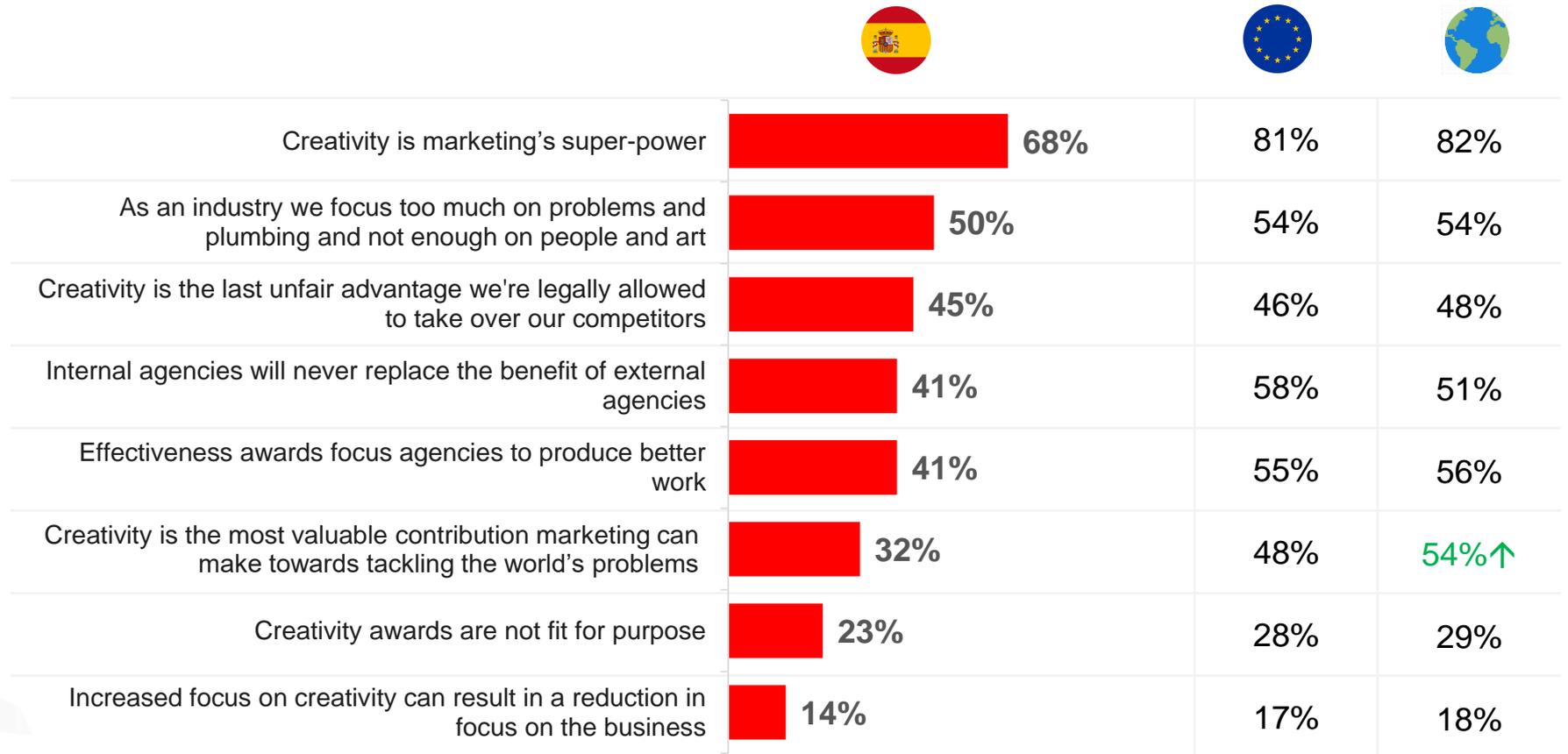


Chart shows Agreement % ('Strongly agree' + 'Somewhat agree')

D2: Please share whether you agree or disagree with the following statements *Single answer on a 5 points scale*

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Global Base: 640 | Europe Base: 349 | Spain Base: 29 respondents

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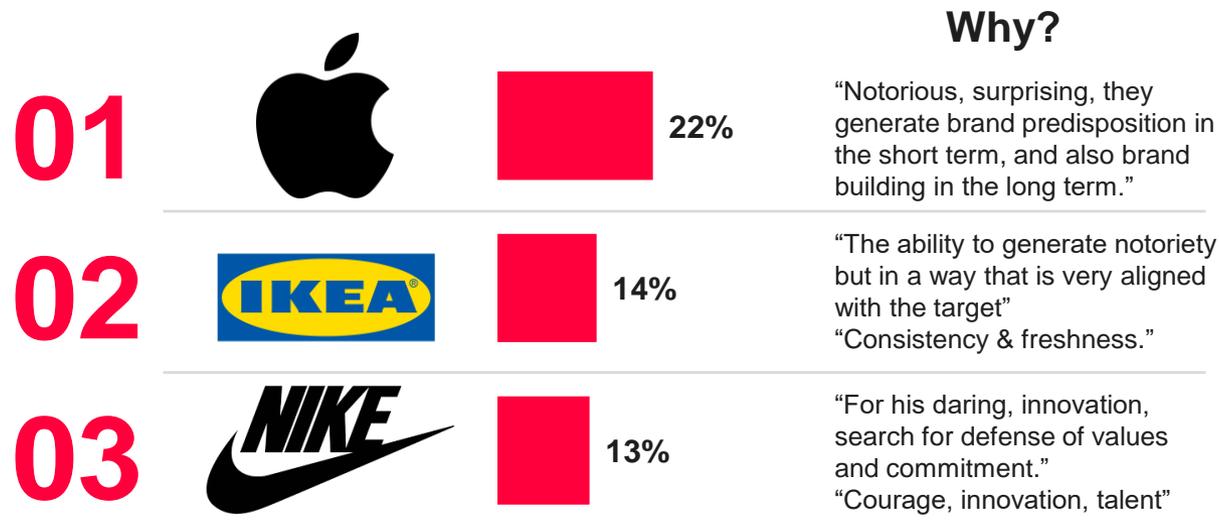
**anunciantes**  
Comunicar para crear valor



# Admired companies for their communication creativity

**Apple** is the most admired brand in Spain for their notorious and surprising campaigns and distinct brand image, followed by **Ikea** and **Nike**.

## Which companies do you most admire in terms of their communications creativity?



Only top mentions are shown

C4. Which companies do you most admire in terms of their communications creativity? Please explain why. Open ended answer

Source: WFA Survey on 'Clients and creativity' in partnership with Contagious and The Observatory International, March-April 2022;

Spain Base: 29 respondents

# Key learnings



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# Executive Summary

## 1. Understanding what creativity is today:

- ✓ For Spanish marketers, creativity is a **fundamental tool that transmits the company's values and messages** abroad for various purposes, the **competitive advantage** that helps the **business to grow**.
- ✓ For 1 in 3, their organisation's creativity is appreciated as “**compelling and contagious**”.
- ✓ 21% see creativity as ‘**business critical**’, in line with Europe & global benchmarks.

## 2. Current state of play:

- ✓ Spanish organisations show above average performance for **creative strategy** and **ideas, brand purpose, talent, flawless execution** and **collaboration with agencies**.
- ✓ Finding **partners who challenge**, and the **briefing process** require more focus in Spain, similarly to most markets in Europe or other regions.
- ✓ **Local Strategy and Local Creative** is the most **effective** and **popular** creative process approach followed in Europe and worldwide and this constitutes an **opportunity for Spanish organisations**.

## 3. Future outlook:

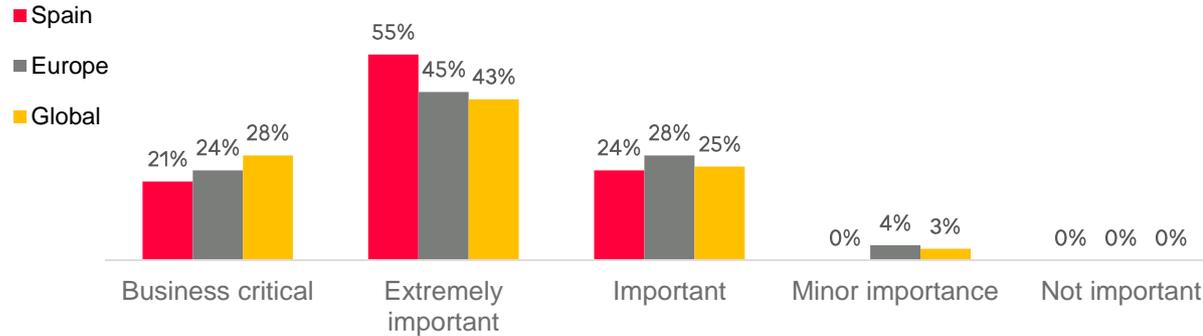
- ✓ **Short-termism, budget cuts** and **risk averse culture** are perceived as main barriers for creativity today in Spain, in line with Europe & global benchmarks.
- ✓ Most Spanish marketers believe that **improving their understanding of the consumer** and **the ways of working between people** would enhance creativity, similarly to the rest of Europe/ globe.

## 4. What marketers think about creativity:

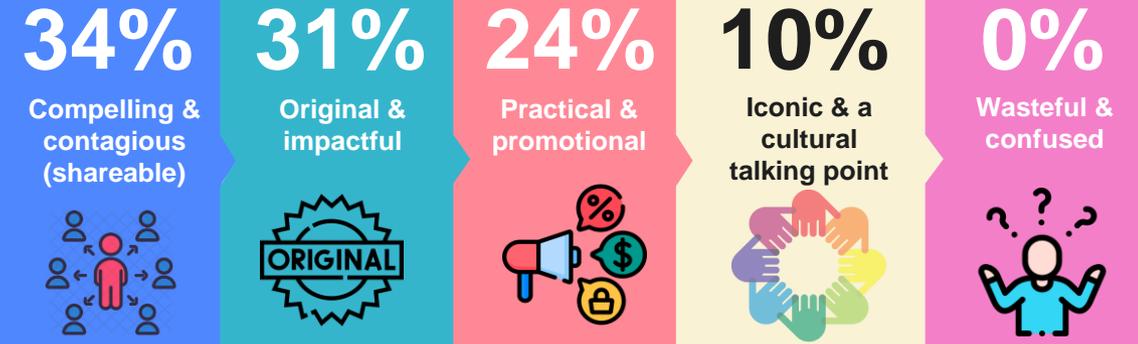
- ✓ Majority of Spanish marketers agree that **Creativity is marketing's super-power** - yet, comparing the results with the European and global norms, the agreement level is directionally lower in Spain.
- ✓ Moreover, less agree that **creativity is the most valuable contribution marketing can make towards tackling the world's problems** as compared to global level.



## Importance of marketing communications creativity



## Performance of organisations in terms of marketing communications creativity



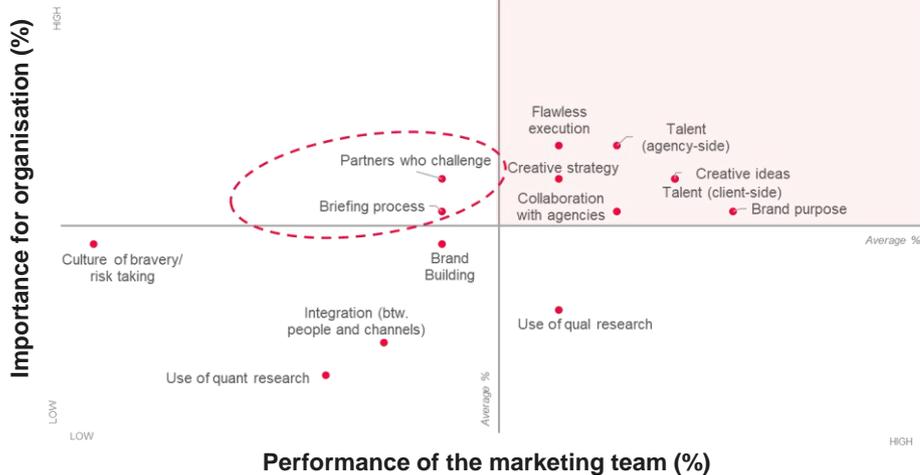
## Thoughts on improving creativity

- Higher focus on creative process (brief, execution, measure results)
- Take risks and bold decisions
- Execution is fundamental

## Most used approach(es) in organisations



## Performance in creativity – Focus areas



## Main Challenges

- Short-term focus
- Budget cuts
- Risk averse culture

## Main Opportunities

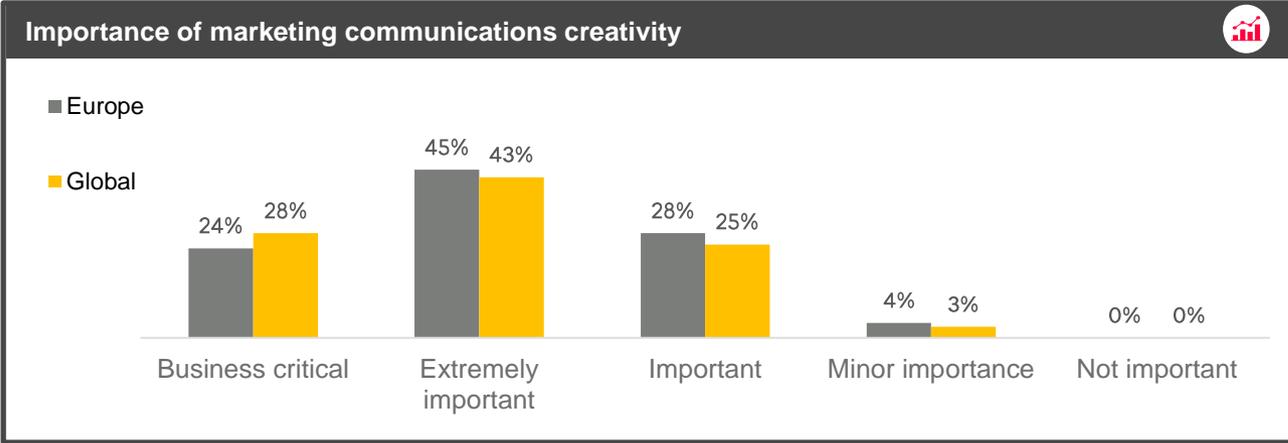
- Improving our understanding of the customer
- Improving ways of working between people (internally and externally)
- Improving our briefing process

## Top beliefs about creativity

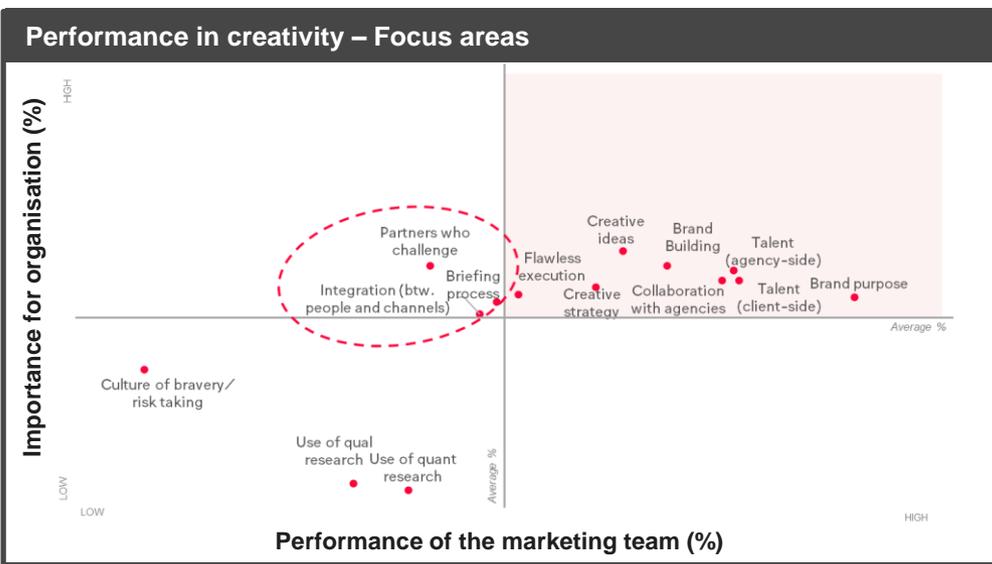
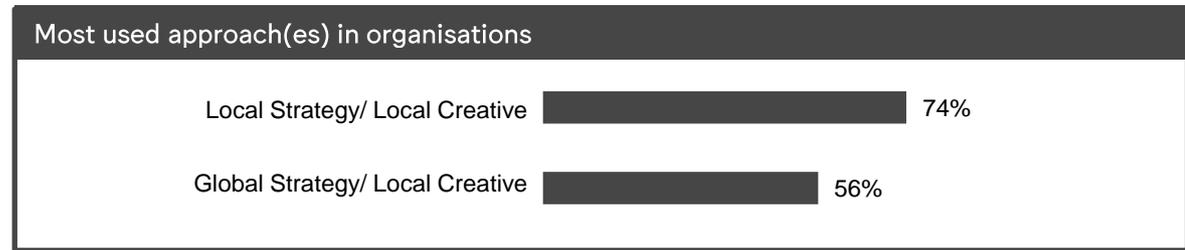
- Creativity is marketing's super-power
- As an industry we focus too much on problems and plumbing and not enough on people and art
- Creativity is the last unfair advantage we're legally allowed to take over our competitors

## Top admired brands





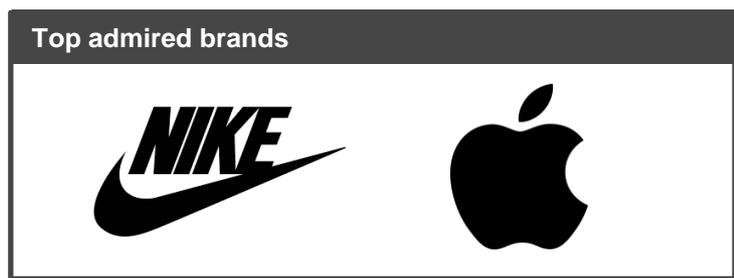
- ### Thoughts on improving creativity
- Higher focus on creative process, especially on the brief
  - Take risks and bold decisions
  - Collaboration/partnership with the agencies is key



- ### Main Challenges
- Short-term focus
  - Risk averse culture
  - Budget cuts

- ### Main Opportunities
- Improving our ways of working between people (internally and externally)
  - Improving our understanding of the customer
  - Improving our briefing process

- ### Top beliefs about creativity
- Creativity is marketing's super-power
  - Internal agencies will never replace the benefit of external agencies
  - Effectiveness awards focus agencies to produce better work
  - As an industry we focus too much on problems and plumbing and not enough on people and art

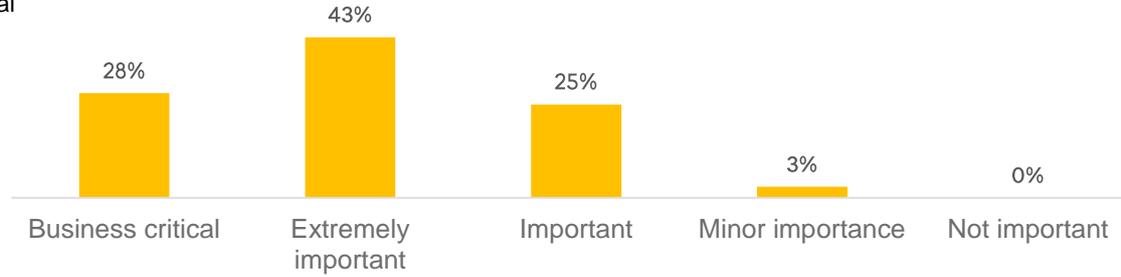




### Importance of marketing communications creativity



■ Global



### Performance of organisations in terms of marketing communications creativity



42%

Original & impactful



27%

Practical & promotional



22%

Compelling & contagious (shareable)



8%

Iconic & a cultural talking point



1%

Wasteful & confused



### Thoughts on improving creativity

- Higher focus on creative process, especially on the brief
- Take risks and bold decisions
- Collaboration/partnership with the agencies is key

### Most used approach(es) in organisations



### Performance in creativity – Focus areas



### Main Challenges

- Risk averse culture
- Short-term focus
- Too many decision-makers in the creative process/unclear responsibilities

### Top beliefs about creativity

- Creativity is marketing's super-power
- Effectiveness awards focus agencies to produce better work
- Creativity is the most valuable contribution marketing can make towards tackling the world's problems
- As an industry we focus too much on problems and plumbing and not enough on people and art

### Main Opportunities

- Improving our understanding of the customer
- Improving our briefing process
- Improving our ways of working between people (internally and externally)

### Top admired brands



Gracias!



**anunciantes**  
*Comunicar para crear valor*