



**MOORE** Kingston Smith

# FINANCIAL PERFORMANCE OF MARKETING SERVICES COMPANIES

**Annual Survey 2021**

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#annualsurvey2021

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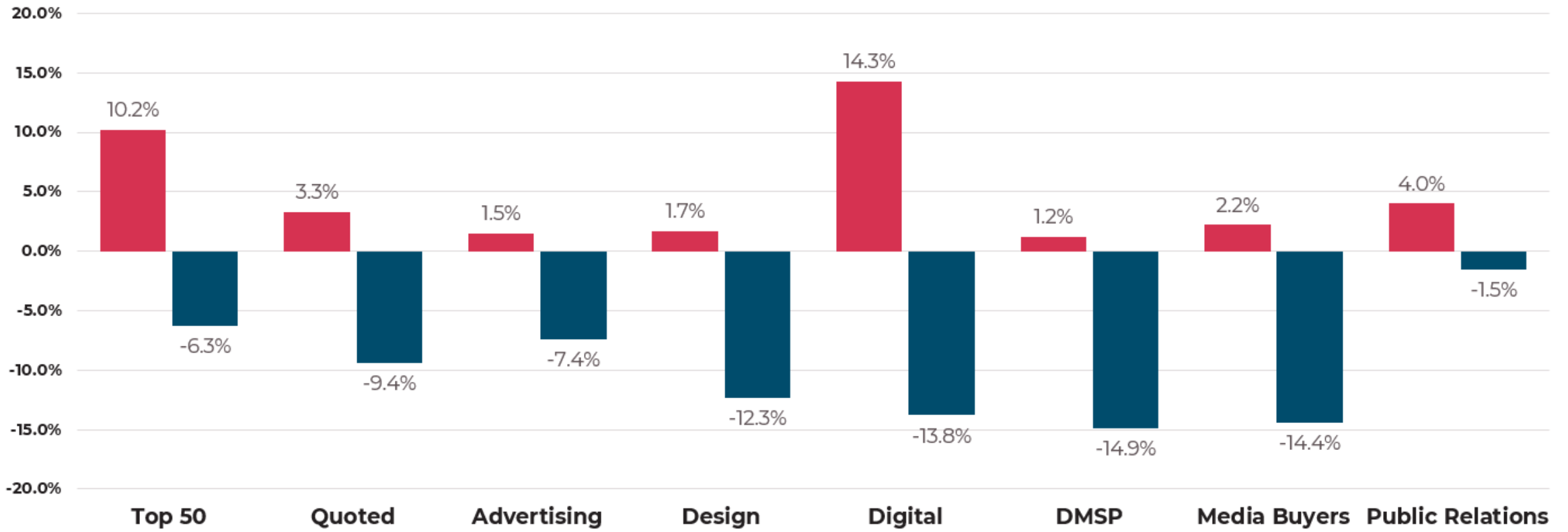
## SURVEY STRUCTURE

- Results across all individual disciplines:
  - Digital
  - Advertising
  - Media buying
  - Marketing and sales promotion
  - Public relations
  - Branding and design
- Moore Kingston Smith 2021 survey

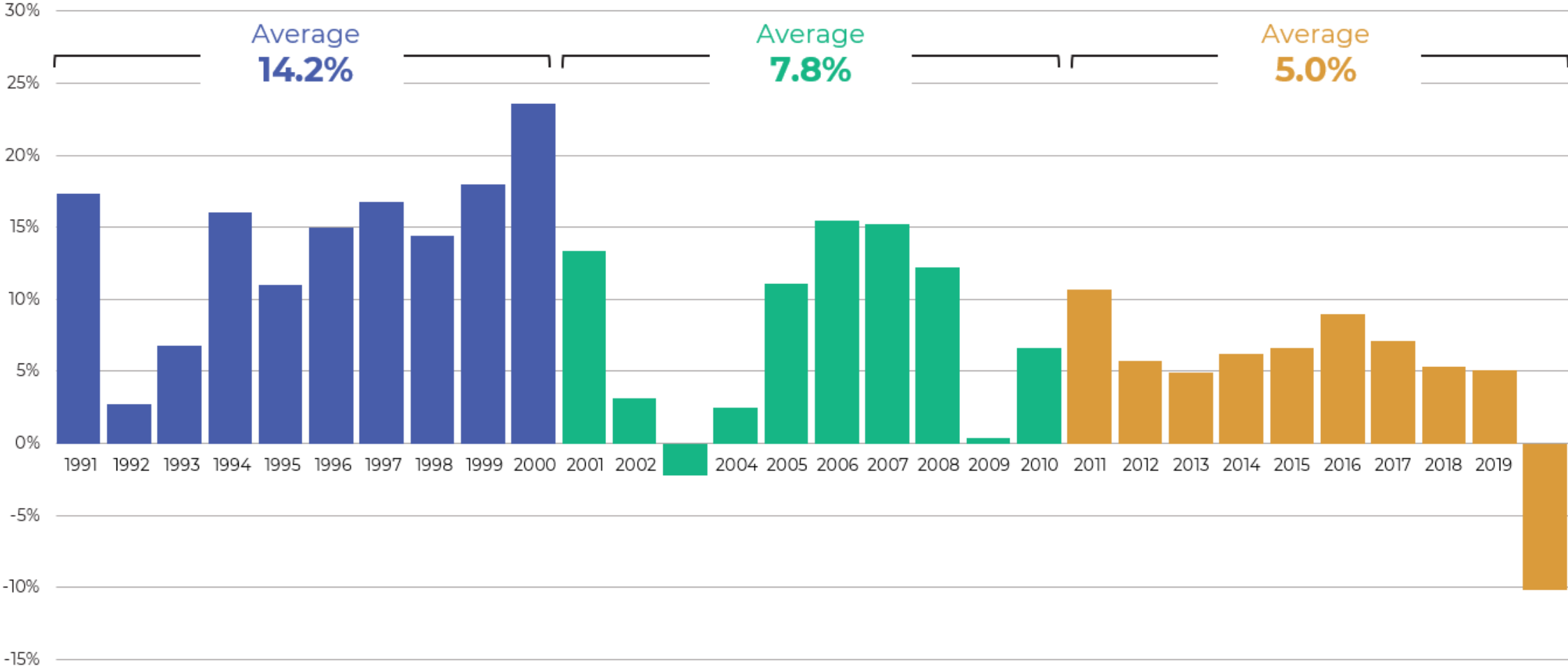
# REVENUE GROWTH

2019 figures

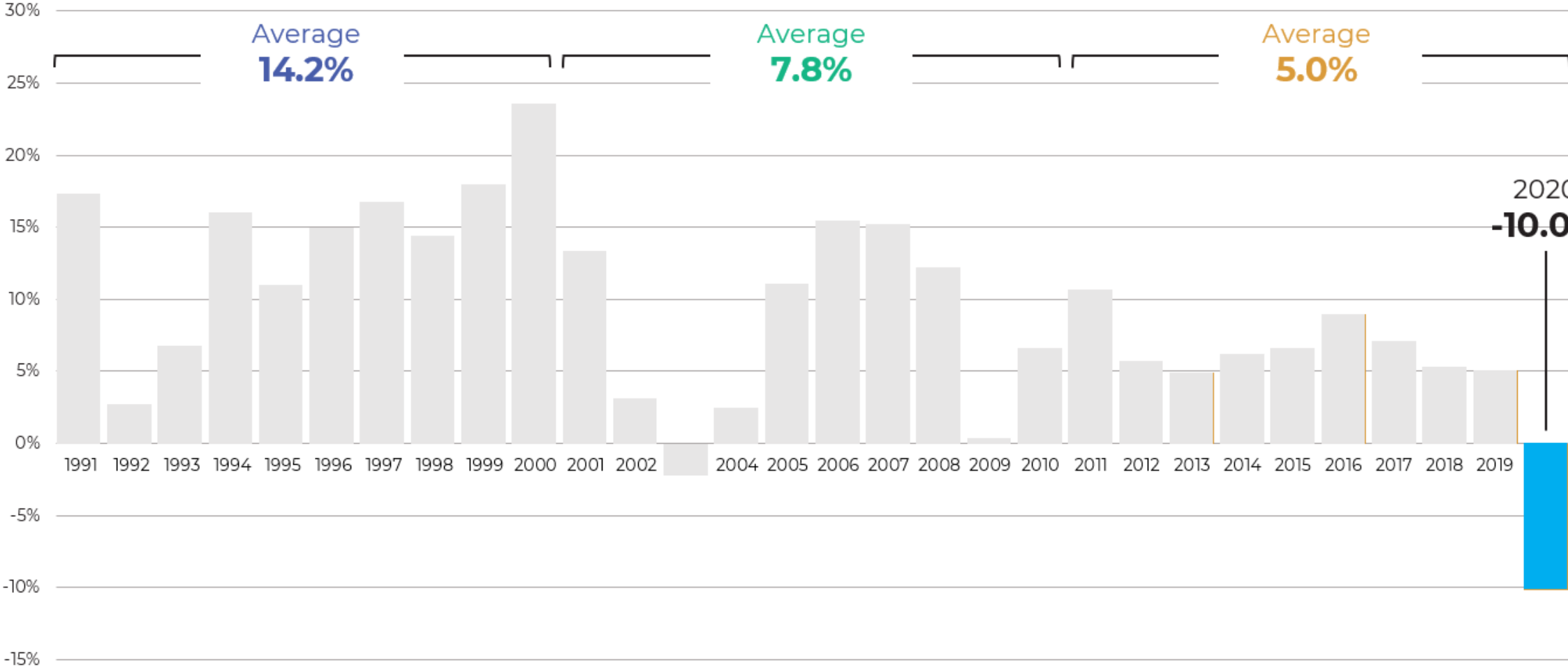
2020 figures



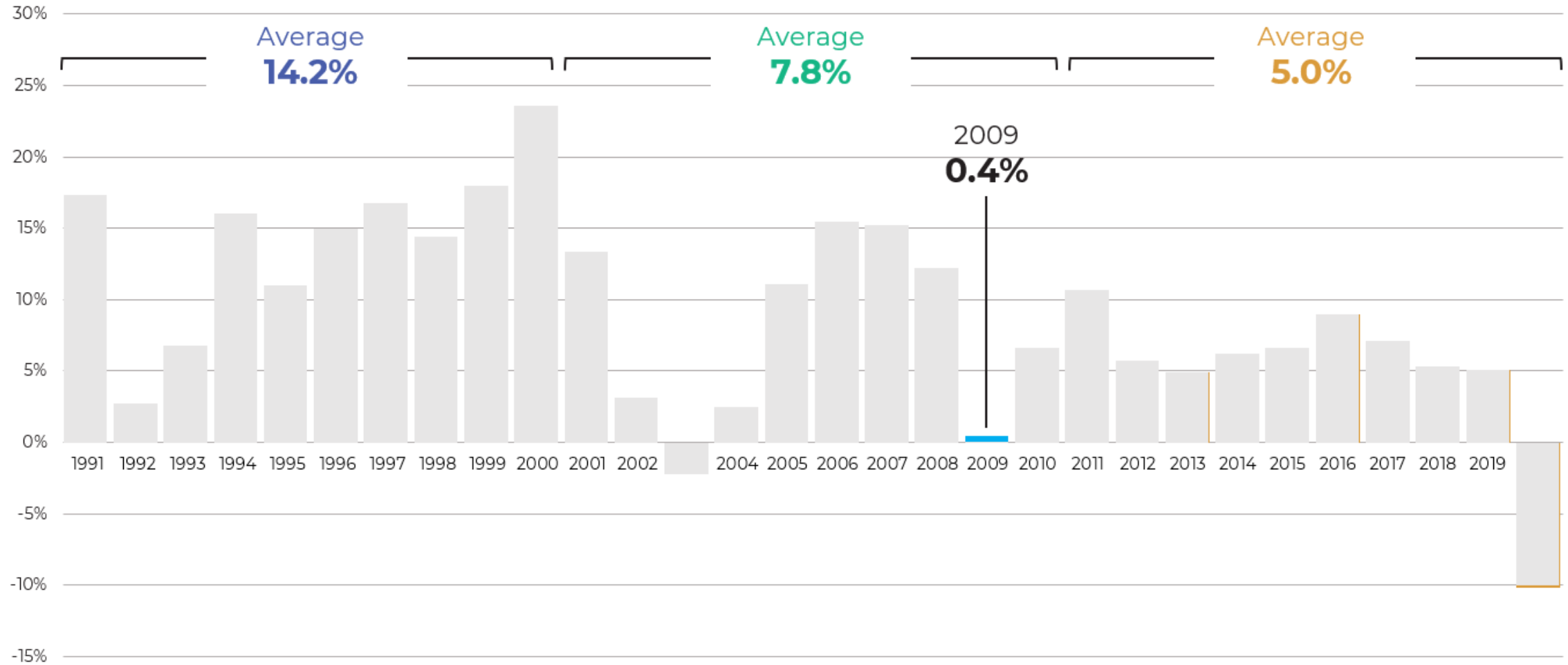
# REVENUE GROWTH (%)



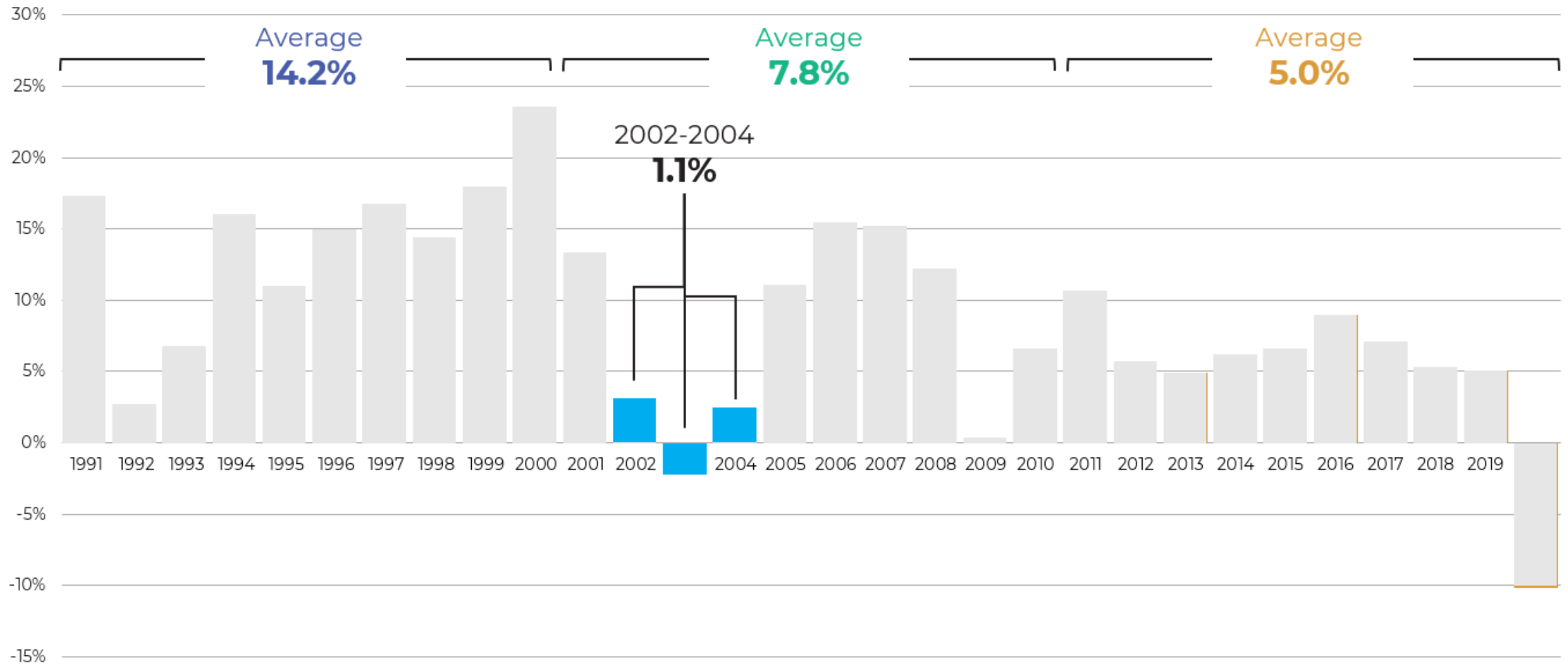
# REVENUE GROWTH (%)



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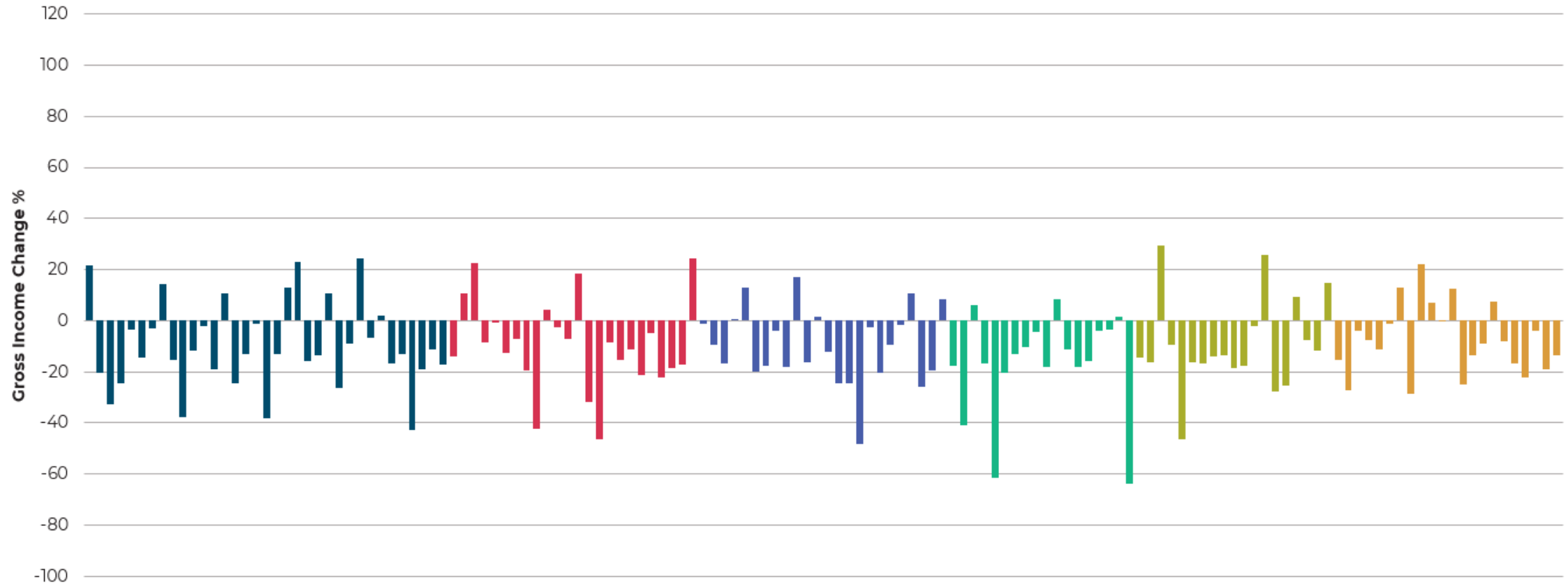


# REVENUE GROWTH (%)



# REVENUE

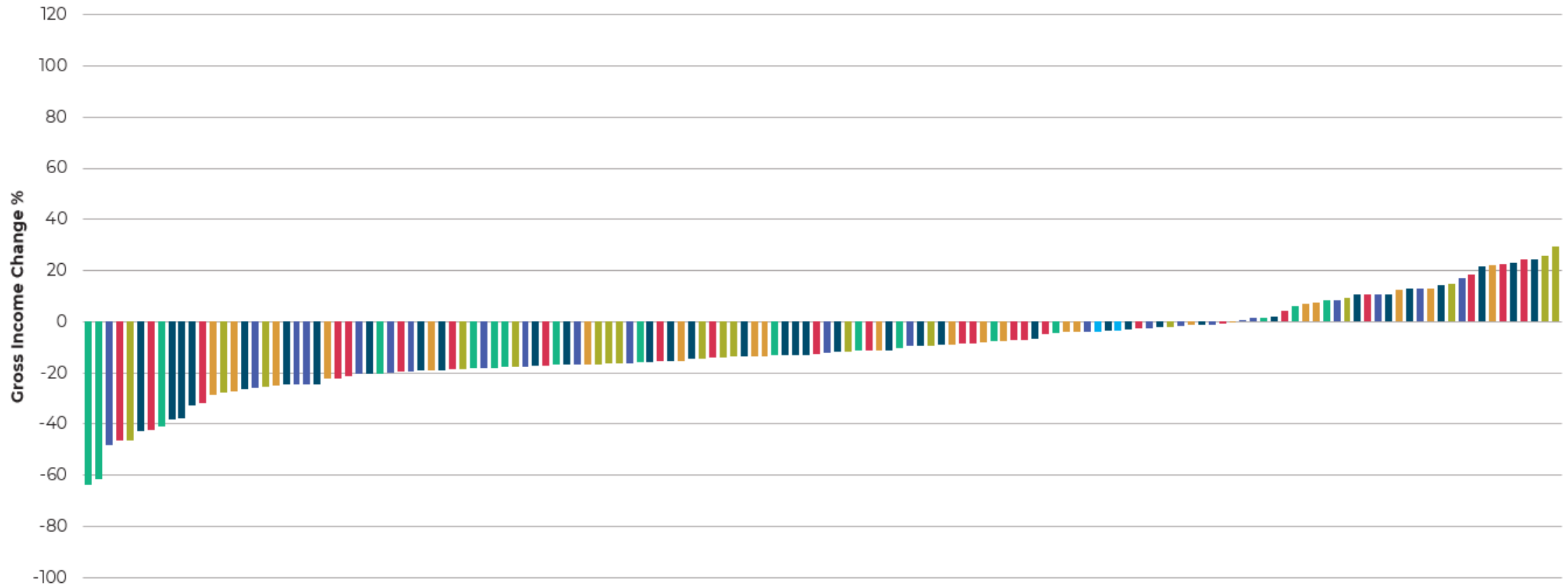
Advertising   Design   Digital   Marketing and Sales Promotion   Media Planning and Buying   Public Relations





# REVENUE

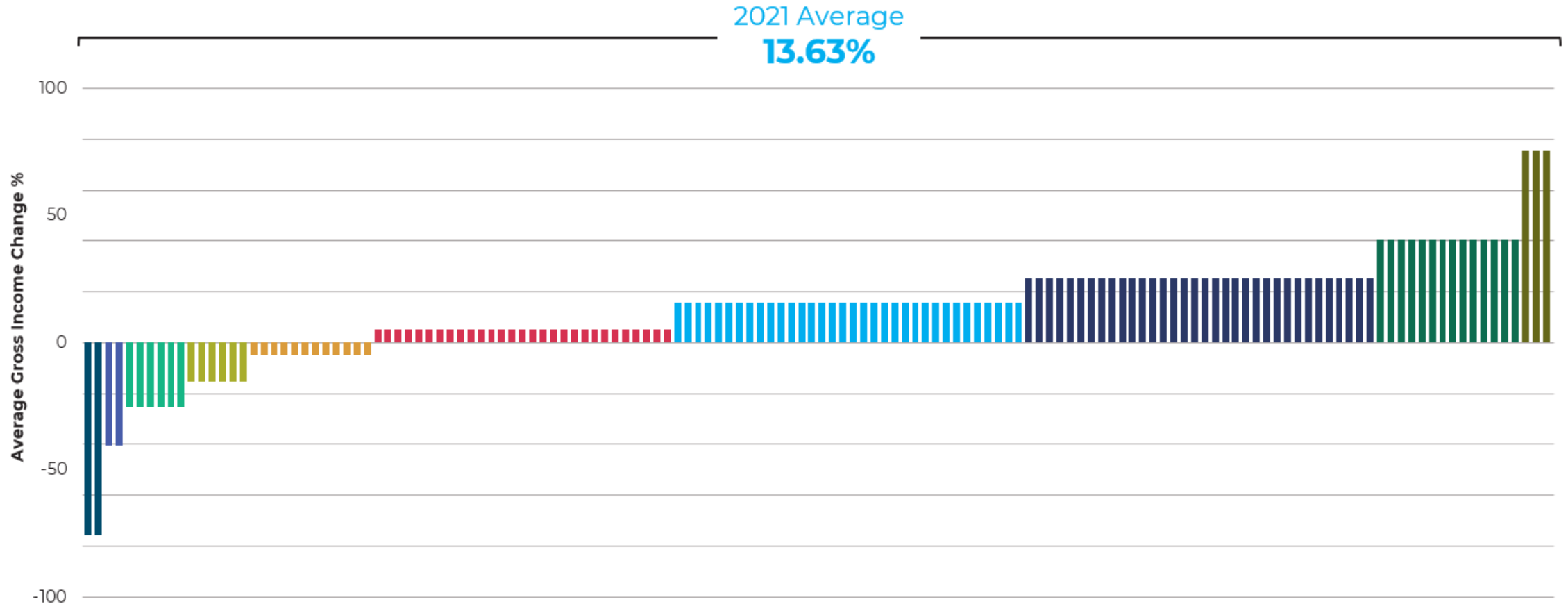
Advertising   Design   Digital   Marketing and Sales Promotion   Media Planning and Buying   Public Relations





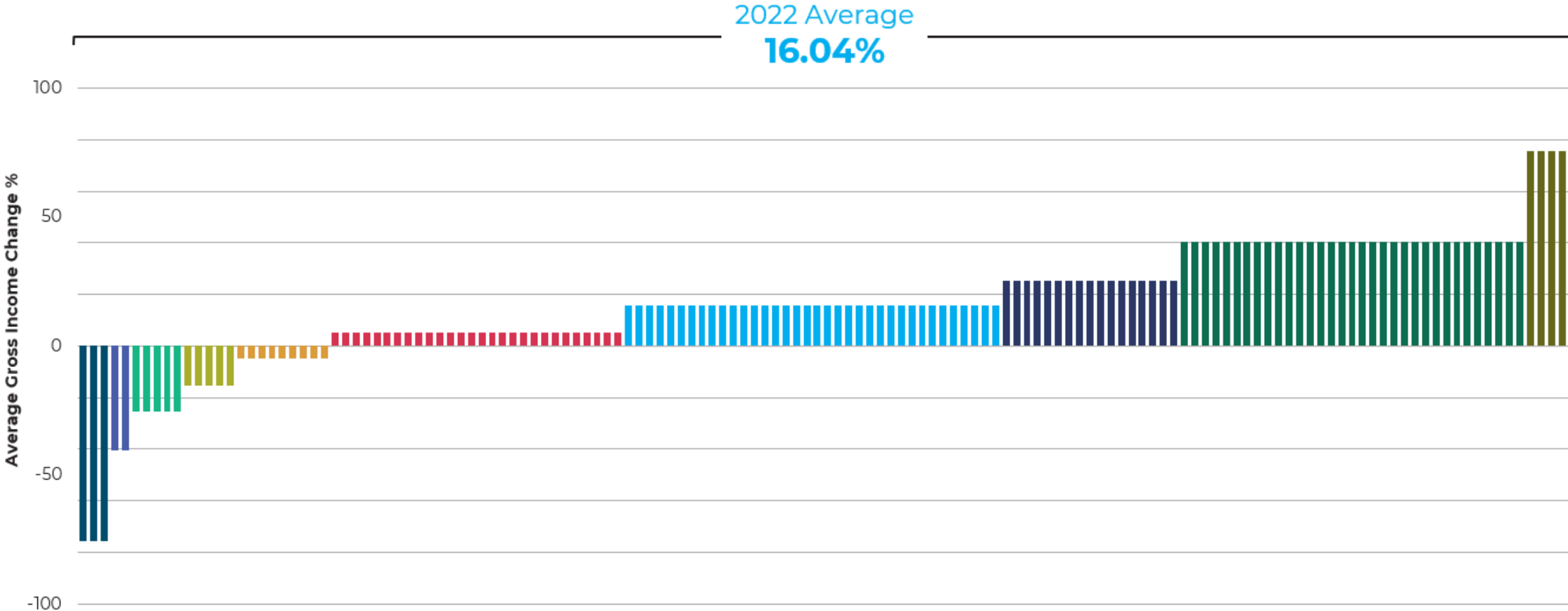
# REVENUE

Less 51-100 Less 31-50 Less 21-30 Less 11-20 Less 0-10 Increase 0-10 Increase 11-20 Increase 21-30 Increase 31-50 Increase 51-100



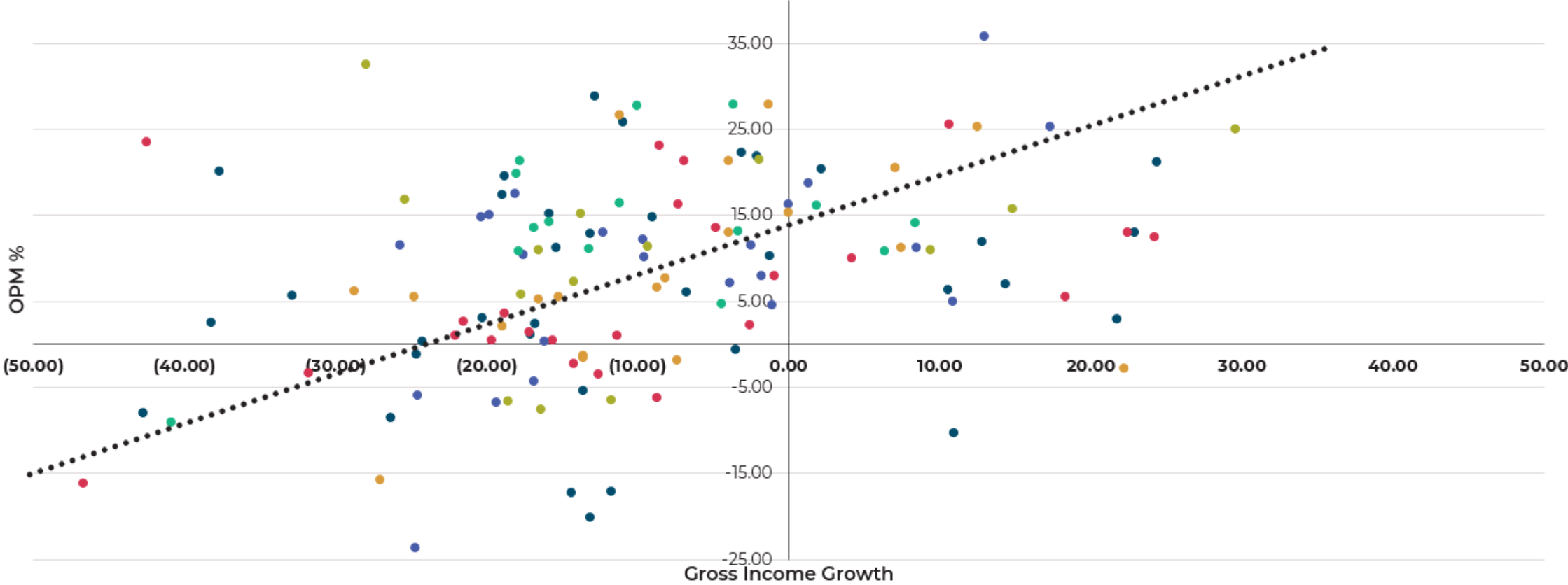
# REVENUE

Less 51-100 Less 31-50 Less 21-30 Less 11-20 Less 0-10 Increase 0-10 Increase 11-20 Increase 21-30 Increase 31-50 Increase 51-100



# REVENUE GROWTH VS OPERATING PROFIT MARGIN

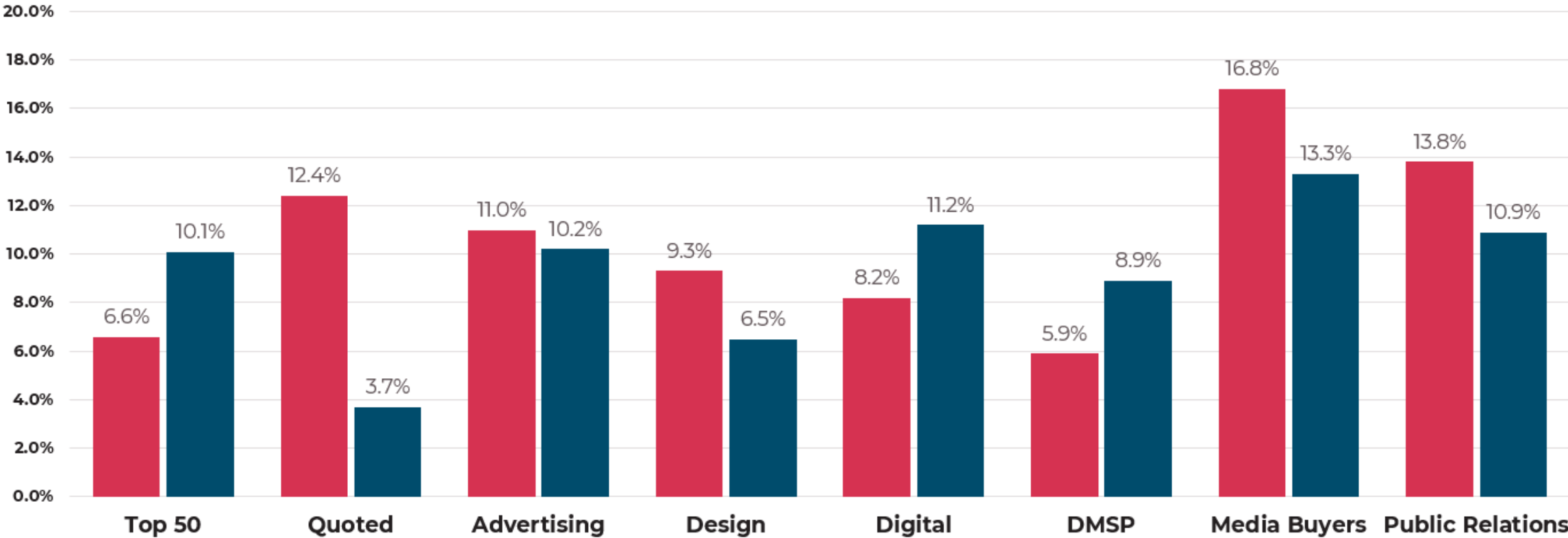
Advertising   Design   Digital   Marketing and Sales Promotion   Media Planning and Buying   Public Relations



# PROFIT MARGIN

2019 figures

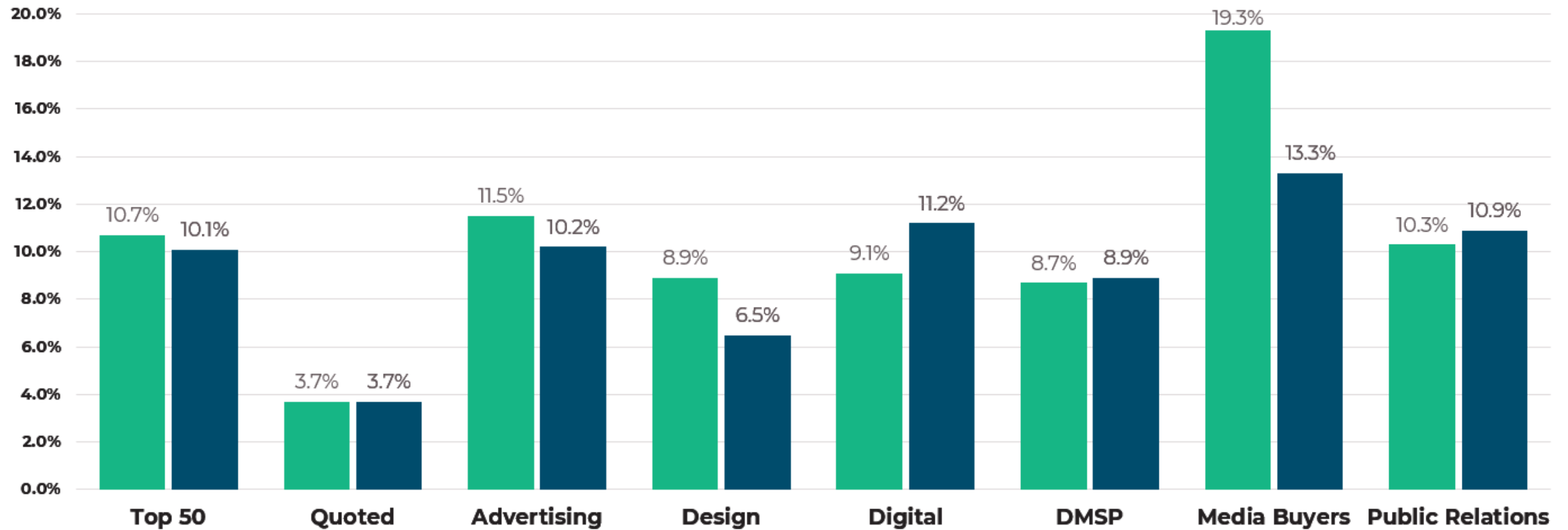
2020 figures



# PROFIT MARGIN

2019 figures same companies

2020 figures

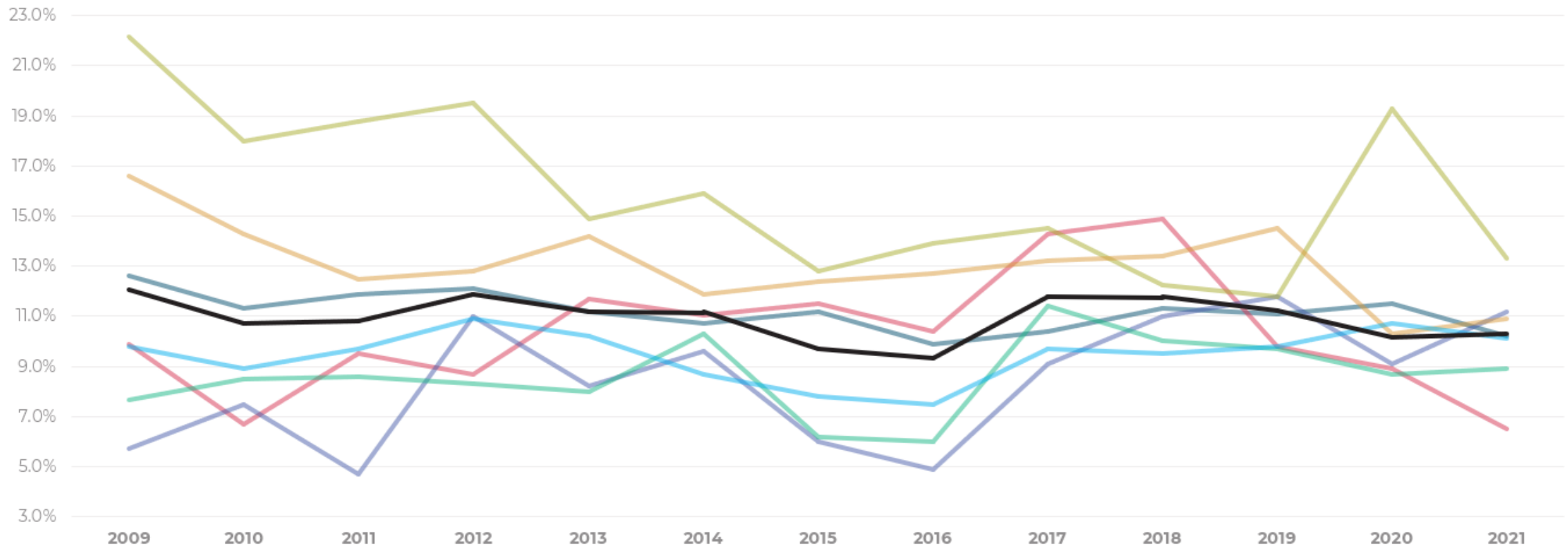


# OPERATING PROFIT MARGIN

Advertising   Design   Digital   Marketing and Sales Promotion   Media Planning and Buying   Public Relations

Top 50

Average





# OPERATING PROFIT MARGIN

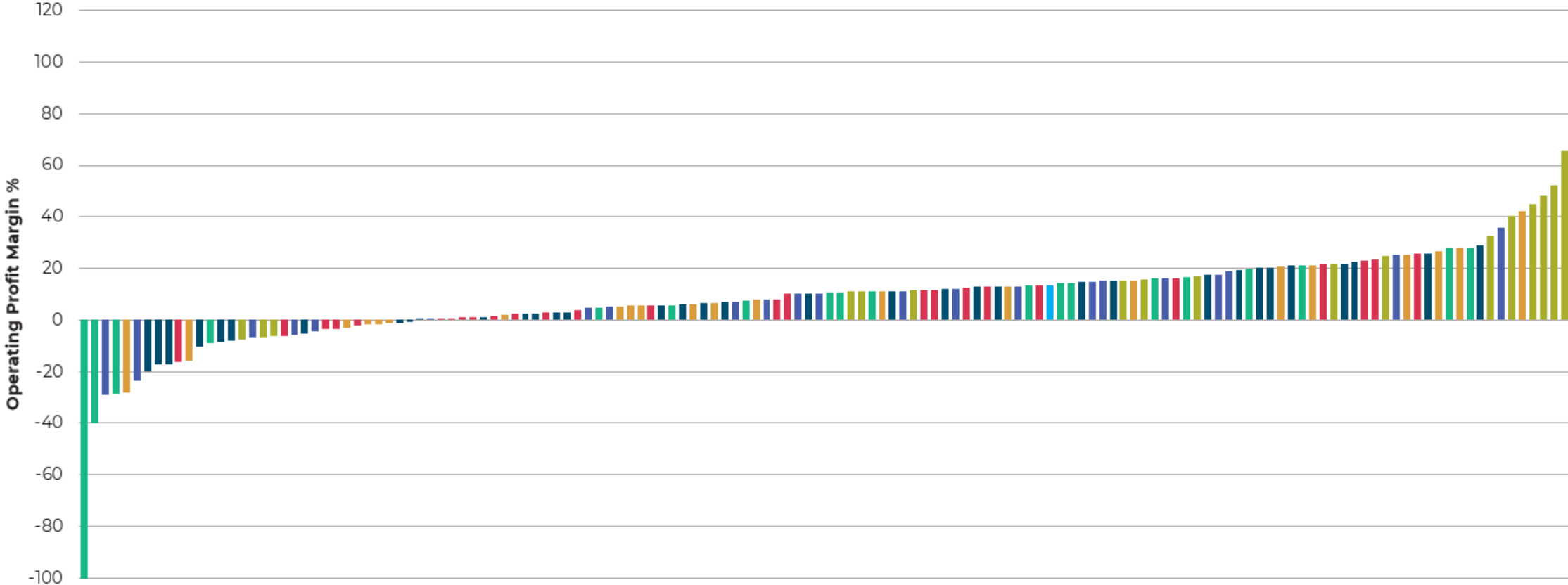
## Average



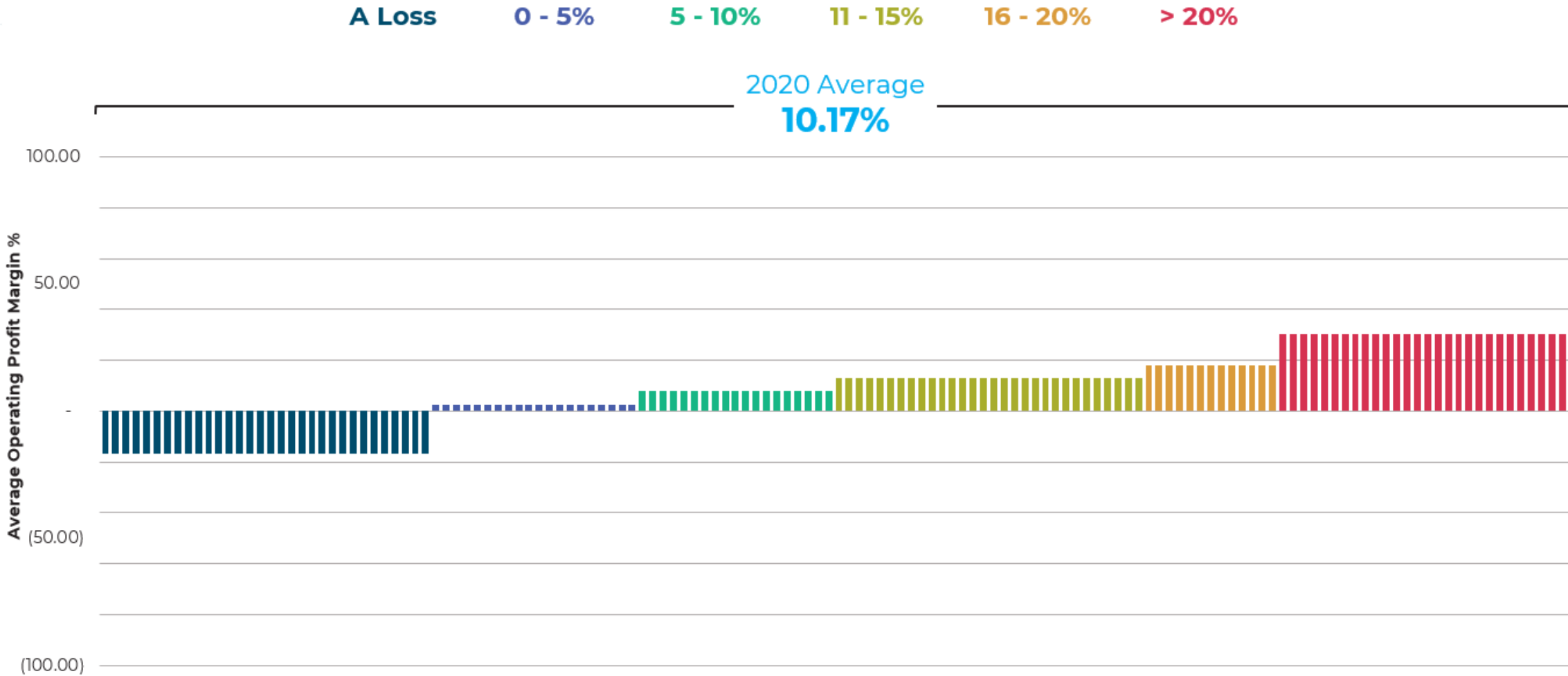


# OPERATING PROFIT MARGIN

Advertising   Design   Digital   Marketing and Sales Promotion   Media Planning and Buying   Public Relations

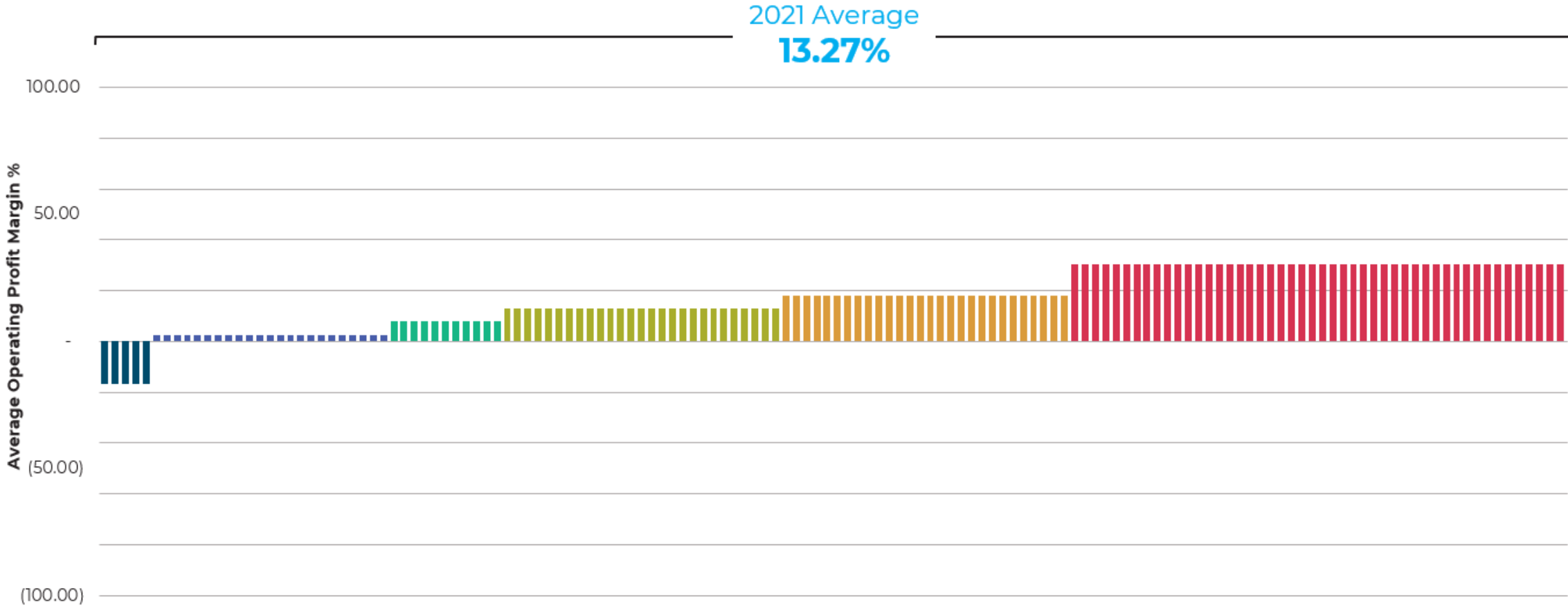


# OPERATING PROFIT MARGIN

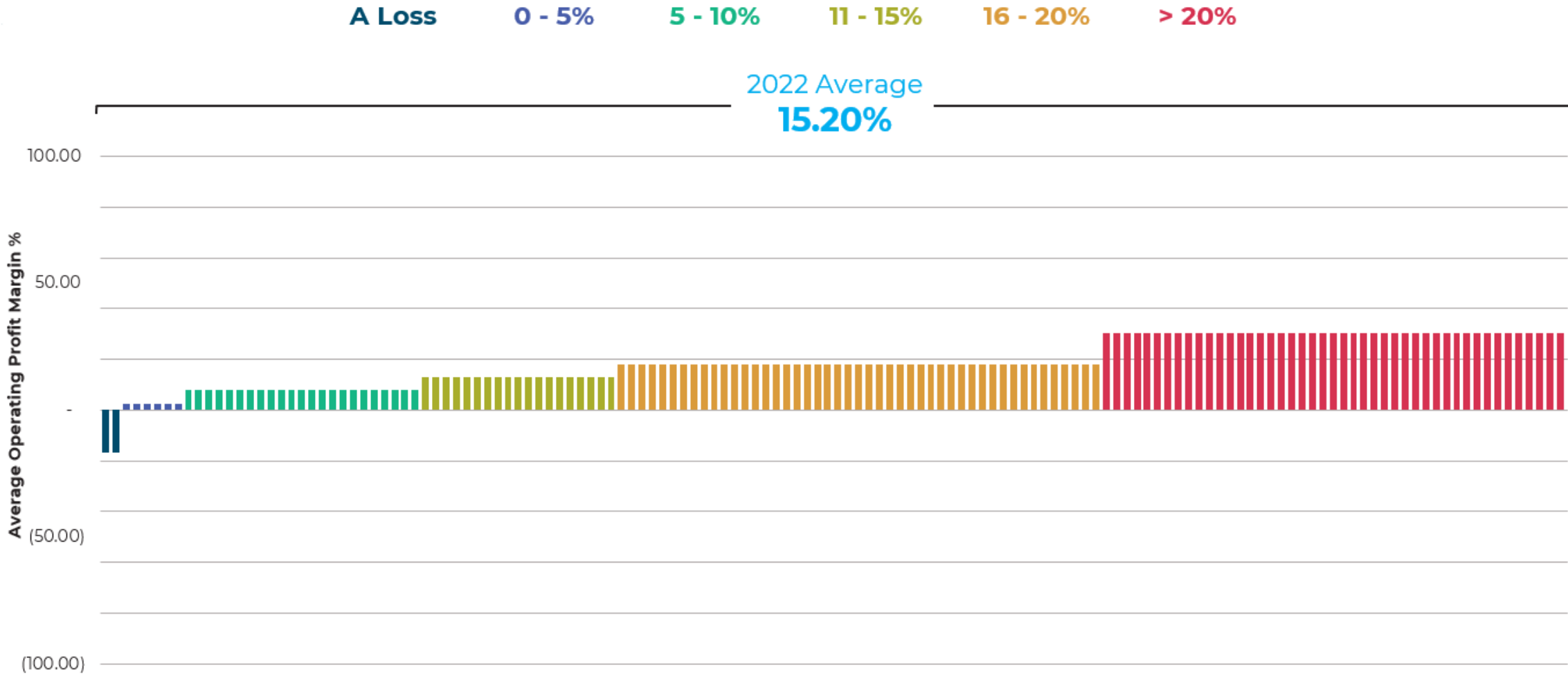


# OPERATING PROFIT MARGIN

A Loss    0 - 5%    5 - 10%    11 - 15%    16 - 20%    > 20%

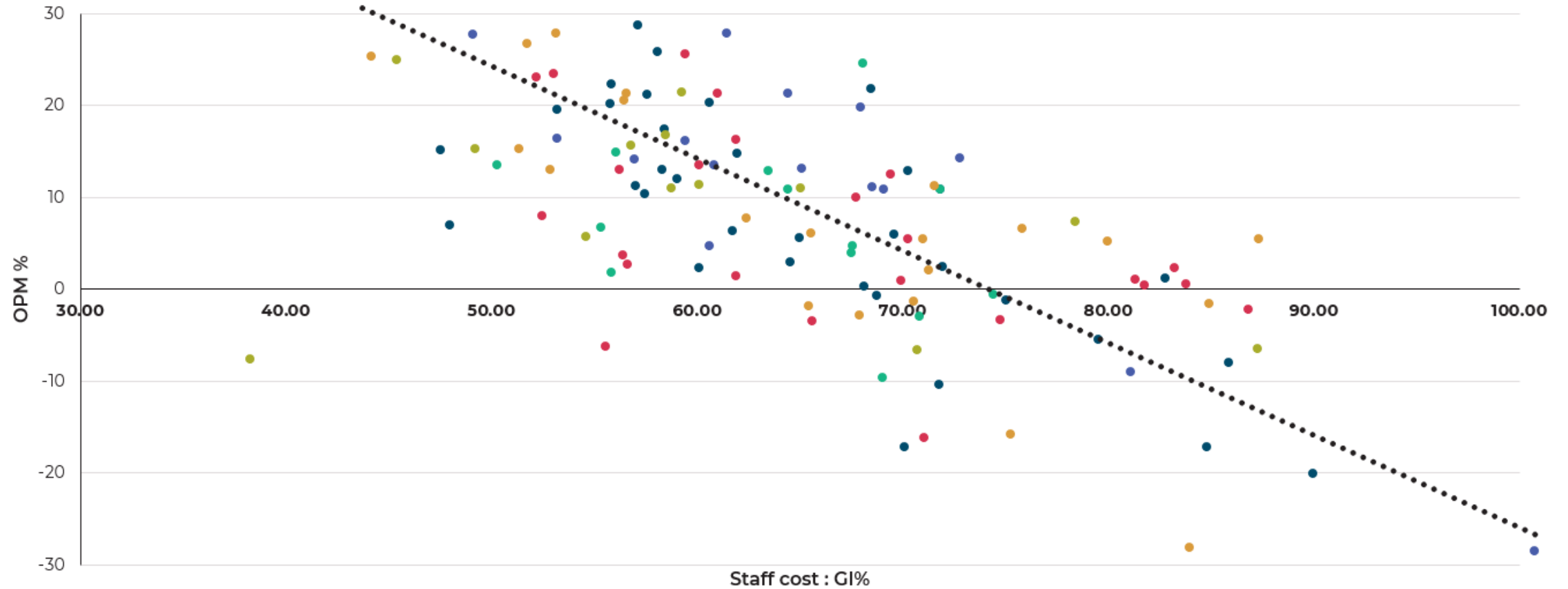


# OPERATING PROFIT MARGIN

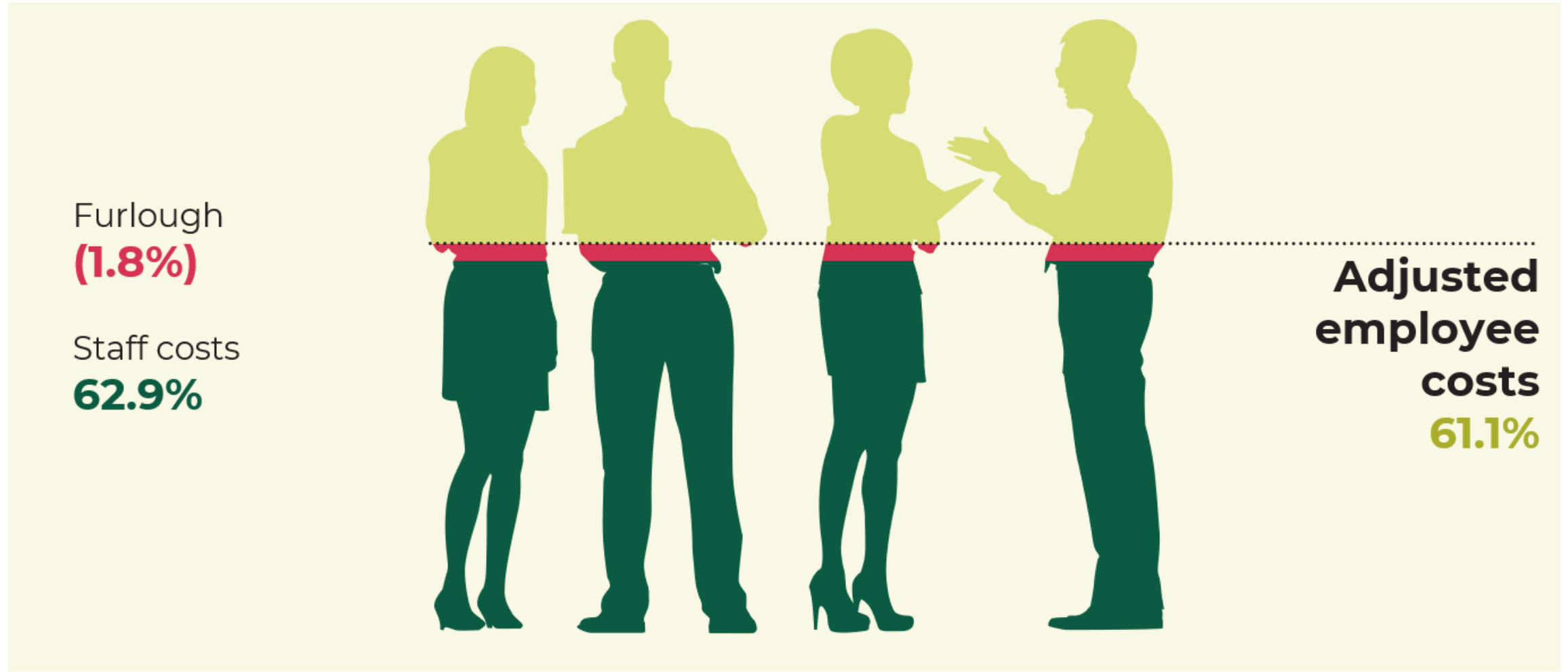


# STAFF COSTS: GROSS INCOME VS OPERATING PROFIT MARGIN

Advertising   Design   Digital   Marketing and Sales Promotion   Media Planning and Buying   Public Relations

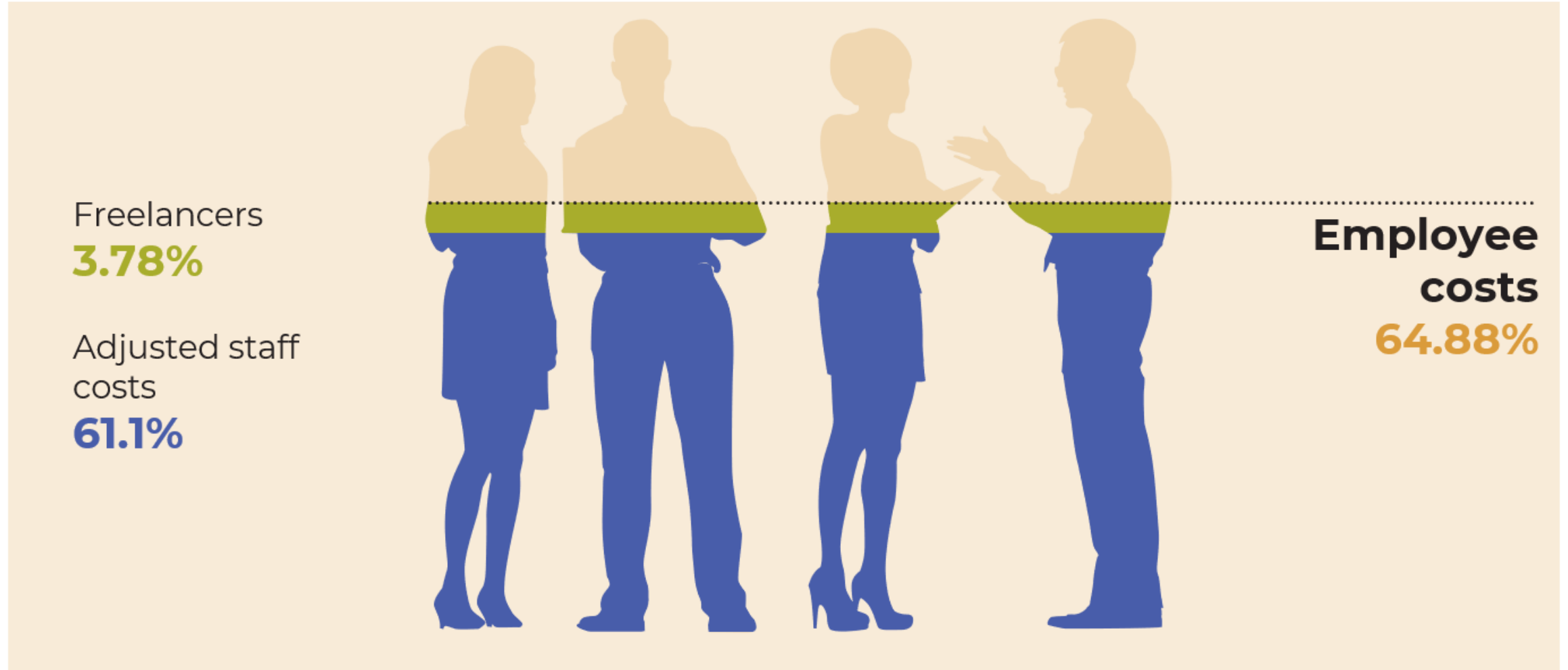


# FURLOUGH





# FREELANCERS





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# DIRECTORS' REMUNERATION

– SURELY IT HAS A BIG IMPACT  
ON PROFIT MARGINS?

# TOP PERFORMERS

Lousin Holdings

Kinetic Worldwide

Publicis Media Exchange

Walker Media

Galliard Healthcare Communications

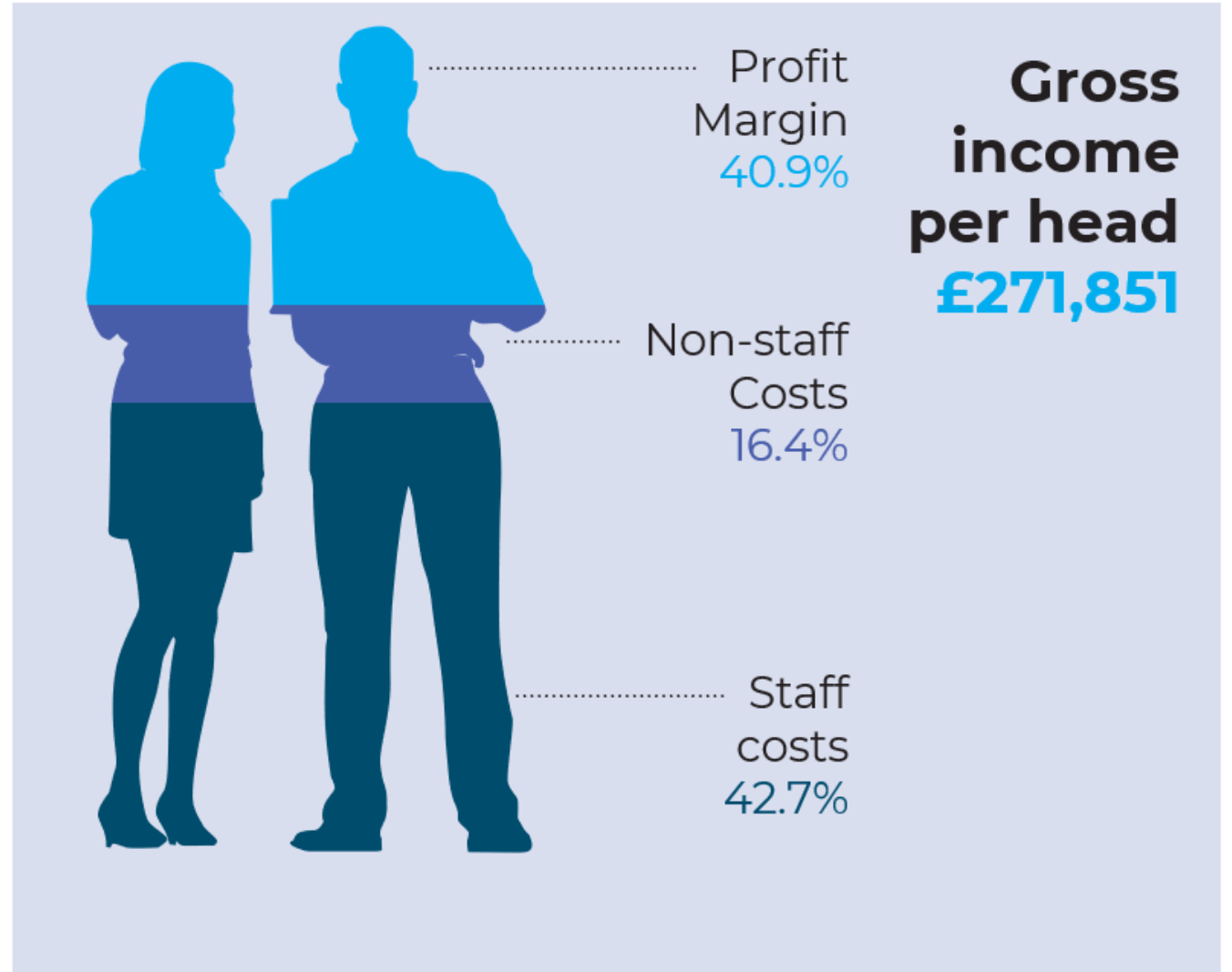
Dentsu Aegis Manchester

Cognifide

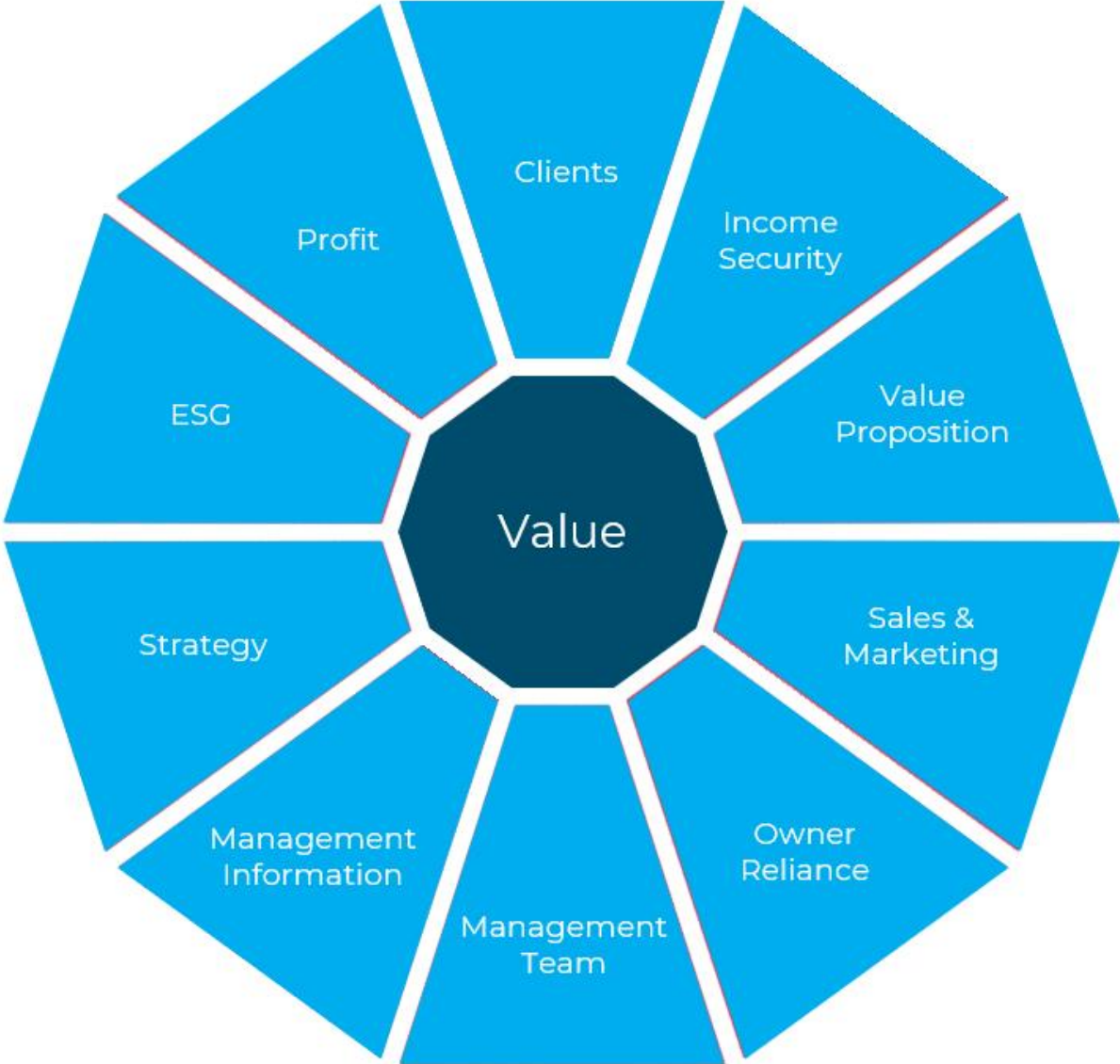
Talon Outdoor

Krow Communications

The Marketing Practice (UK)



# KEY DRIVERS





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# FINANCIAL PERFORMANCE HALL OF FAME

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## FINANCIAL PERFORMANCE HALL OF FAME

- Revenue growth
- Fee income > £120,000 per head
- Staff costs < 55% of fee income
- Operating profit margin > 20%
- Net current assets > 3 months of overheads
- Filed accounts

# HALL OF FAME



**Wavemaker**



TULCIAN

**FITCH**



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## HALL OF FAME

essence



HUNTSWORTH



Galliard

 cognifide





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