

# Research services offered by Australian advertising agencies

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## Abstract

New media are changing the landscape of market research, and so clients are demanding new services to meet the dynamic nature of the industry. It is paramount that managing directors of advertising agencies can ensure that their firms provide suitable services to fulfill clients' needs, including research services. This study examines responses from 68 managing directors of Australian advertising agencies regarding services offered to clients, the availability of those services, and the extent their clients influence agency functions—with a particular emphasis on the research services offered. The findings indicate that Australian advertising agencies are more likely to offer general market research services, having them readily available, and that clients have an influence on agencies' research functions.

## Introduction

In the advertising industry, advertising agencies place a tremendous amount of effort on obtaining and maintaining a positive agency-client relationship by providing the services required by clients. A solid agency-client relationship is necessary for a client to effectively promote its product, and for an advertising agency to keep its clients. An understanding of this relationship is vital as an unproductive and negative relationship will likely lead to the termination of the agency's services, which can result in major outlays of time, money and effort

for the client. This can involve delays in implementing new campaigns, time spent on the process of selecting a new agency, and the development of rapport, trust and confidence in the new agency (Quinn 1978; Newsome 1980; Cook 1988; Weilbacher 1991). It has been suggested that less than half of client-ad agency relationships last longer than five years (Beard 1999), and the failure to build a long standing relationship can result in "significant costs and anguish", with the process of switching agencies and developing a new partnership taking up to two years (Michell and Sanders

1995). Thus, the changing of advertising agencies can have a negative impact on the firm (Michell 1984; Cagley and Roberts 1984; Buchanan and Michell 1991; Mathur and Mathur 1996; Waller 2004), so it is vital to maintain a positive agency-client relationship.

An important issue in agency-client relationships is the "people factor", particularly in the area of agency selection and evaluation (Cagley and Roberts 1984; Cagley 1986; Wackman, Salmon and Salmon 1986; Harvey and Rupert 1988; Verbeke 1988; Marshall and Na 1994; Mathur and Mathur 1996; and Fam and Waller 1999a). This is understandable as advertising agencies provide services in "the creation, production and/or placement of the communication message" (Belch and Belch 2004), and services are highly dependent on the people who provide the service (Parasuraman and Zeithami 1983). Further, when it comes to measuring agency performance, Lace (1998) identified five key performance measures: contribution to the achievement of client marketing objectives; contribution to the standing of client product(s), service(s) or brand(s); creative output; value for money; and service quality. He found from a study of United Kingdom clients that there was need for improved satisfaction in the areas of value for money and service delivery.

This paper aims to analyse the services offered by advertising agencies and the advertiser's influence on agency functions. It will focus on the research-related services offered by agencies, comparing both large and small agencies, to determine where these services fit in relation to other agency services, such as creative or account services.

### **Background**

Most aspects of the relationship between advertising agencies and their clients have been well documented, and are reflected in the "the development of an interesting, diverse and relevant body

of literature" (West and Paliwoda 1996). Waller (2004) presented the main theoretical issues regarding agency-client relationships in three main stages: (1) agency evaluation/selection; (2) relationship development and maintenance; and (3) agency review/termination. Bush and Bush (2000) provided an overview of research on agency-advertiser relationships and reported that much of the research has examined a broad range of organisational, managerial, and interpersonal factors that have the ability to disrupt the agency-advertiser relationship. Organisational issues such as agency selection, account switching, agency loyalty, and organisational buying have been closely looked at by Buchanan and Michell (1991), Cagley and Roberts (1984), Michell (1987), Michell (1988), Michell, Cataquet and Hague (1992), Michell and Sanders (1995), Fam and Waller (1999a), Fam and Waller (1999b), and Prendergast, Shi and West (2001). Managerial issues such as relationship development, campaign development, agency performance, media planning, and advertising talent availability have been studied by Hotz, Ryans, and Shanklin (1982), Wackman, Salmon, and Salmon (1986), Verbeke (1988), and Abratt and Cowan (1999). Finally, interpersonal factors such as client role ambiguity and satisfaction in client-agency relationships have been closely examined by Beard (1996, 1999).

Wackman, Salmon and Salmon (1986) identify four sets of factors that can influence the success of agency-client relationships. The factors are: (1) Work product: the advertising and advertising plans; (2) Work patterns: the daily aspects of how the agency and client work together; (3) Organisational factors: including company policy, structure, and politics, and the qualifications/experience of personnel involved; and (4) Relationship factors: the "chemistry" of the relationship which includes the level of trust, respect, rapport, and comfort between agency and client personnel.

They found that relationship factors were the most highly significant predictor of a client's satisfaction with its agency, followed by organisational factors, work pattern and work product factors. Yet, even though services are dependent on the people who provide them, the service needs of clients must still be fulfilled (Parasuraman and Zeithaml 1983), and there is growing interest in looking at advertising agency services and assessing agency service quality (Fam and Waller 1999b; Na, Marshall and Son 1999; Na, Marshall and Son 2003).

The main services provided by an advertising agency are: (1) Account services, which is the link between agency and client and managed by the account executive; (2) Marketing services, which can include the media department that analyses, selects and contracts media resources, and the research department that designs and executes research programs; and (3) Creative services, which focuses on the creation and execution of advertisements, and employs copywriters, artists and other specialists (Belch and Belch 2004). In one of the few studies using Australian data, Shao and Hill (1992) examined the advertising skills agencies could offer to their clients. In this survey of managing directors throughout Australia, the authors found there to be major shortages of copy translators, cultural advisors and language advisors. Less severe shortages were detected with copywriters, broadcast producers, broadcast directors, account executives, account supervisors and creative directors. The shortage of copywriters was particularly alarming since the creative process is at the heart of advertising operations.

The aim of this paper is to determine the services that Australian advertising agencies offer to their clients and the amount of influence the client has on these services, with a focus on the research activities.

## **Methodology**

To determine the type of services that are provided by advertising agencies, a survey of managing directors of advertising agencies was undertaken. The sampling frame of potential respondents was obtained from industry sources and the Yellow Pages throughout Australia. A profile of agency respondents is listed in Table 1. Over one-quarter of the respondents (26.5%) had 10 or fewer clients, while 70.6% had no more than 30 clients. Most of those responding were from private companies, and the majority had been operating 20 years or less – with over one-third (38.2%) operating between 10 and 20 years. Finally, most respondents (61.8%) had net billings of less than \$10 million. To determine whether there are any differences in the services offered by small and large agencies, respondents were divided into two groups based on net billings: those with billings less than \$10 million (42 agencies) and those with billings greater than \$10 million (22 agencies). It was assumed that the larger agencies would offer more services than the smaller agencies. (Note: four agencies did not state their billings and so they were deleted from further analysis.)

## **Results**

### **Service offered**

The respondents were presented with a list of services that are typically offered by advertising agencies, and were asked to indicate which of those services their agencies regularly offered to their clients. The list of 18 services included a number of creative, management and research activities that agencies can offer to their clients (see Table 2, which ranks the services based on the number of total responses). The top three services offered by over 90% of the agencies were creative activities: copywriting, creativity, and graphic design services. Other highly popular services included assistance with marketing strategy, commercial production, internet development, photog-

raphy, direct-response marketing, and print coordination. As for research services, marketing research was offered by 70% of the agency respondents. Other services offered were attitudinal analysis of consumers (61%) and pre-testing promotions (59%), followed by demographic analysis of target market (53%), psychographic analysis of target market (52%) and post-testing promotions (50%).

Comparing the agencies based on size of billings (less than or greater than \$10 million) to determine whether there are any differences in the services offered by small and large agencies, a z-test was used. Table 2 shows that eight services

had significant differences between the two groups: production of commercials; direct-response marketing; media planning; attitudinal analysis of consumers; pre-testing promotions; demographic analysis of target market; psychographic analysis of target market; and post-testing promotions. With each of these, as predicted, the larger agencies were more likely to offer the services than the smaller agencies, and five of the eight services were research services.

#### Availability of advertising personnel

Respondents were then presented with a list of 24 positions in an advertising agency, and to gain insight into the skill base

**Table 1: Agency Profile**

|  | Number    | Percentage  |
|--|-----------|-------------|
| <b>Number of active clients this agency currently serves</b> |           |             |
| 1 to 10  | 18        | 26.5%       |
| 11 to 20   | 11        | 16.2%       |
| 21 to 30   | 19        | 27.9%       |
| 31 to 40   | 6         | 8.8%        |
| 41 to 50   | 3         | 4.4%        |
| more than 50   | 10        | 14.7%       |
| missing  | 1         | 1.5%        |
| <b>Total:</b>  | <b>68</b> | <b>100%</b> |
| <b>Ownership status of this agency</b>                       |           |             |
| Private  | 55        | 80.9%       |
| Public   | 13        | 19.1%       |
| <b>Total:</b>  | <b>68</b> | <b>100%</b> |
| <b>Number of years the agency been in operation</b>          |           |             |
| Less than 5 years  | 11        | 16.2%       |
| 5 to 9 years   | 12        | 17.6%       |
| 10 to 20 years   | 26        | 38.2%       |
| 21 to 30 years   | 10        | 14.7%       |
| 31 to 40 years   | 2         | 2.9%        |
| more than 40 years   | 7         | 10.3%       |
| <b>Total:</b>  | <b>68</b> | <b>100%</b> |
| <b>The agency's total NET billing in the last year*</b>      |           |             |
| Less than \$10 million                                       | 42        | 61.8%       |
| \$10.1 million to \$20 million                               | 5         | 7.4%        |
| \$20.1 million to \$30 million                               | 2         | 2.9%        |
| \$30.1 million to \$40 million                               | 2         | 2.9%        |
| \$40.1 million to \$50 million                               | 1         | 1.5%        |
| more than \$50 million                                       | 12        | 17.6%       |
| missing  | 4         | 5.9%        |
| <b>Total:</b>  | <b>68</b> | <b>100%</b> |

**Table 2: Services offered to clients**

| Service                                 | Total<br>(64 responses) | Less than \$10m | More than \$10m | z-test<br>(sig) |
|---|-------------------------|-----------------|-----------------|-----------------|
| Copy writing                            | 62                      | 40              | 22              | -1.040 (.298)   |
| Creativity                              | 60                      | 39              | 21              | -.408 (.684)    |
| Design services (graphic)               | 58                      | 38              | 20              | -.056 (.955)    |
| Marketing strategy                      | 56                      | 37              | 19              | -.284 (.777)    |
| Production of commercials               | 52                      | 31              | 21              | -2.107 (.035)*  |
| Internet development                    | 50                      | 34              | 16              | .756 (.450)     |
| Photography                             | 48                      | 32              | 16              | .304 (.761)     |
| Direct-response marketing               | 47                      | 26              | 21              | -2.886 (.004)*  |
| Print coordination                      | 45                      | 28              | 17              | -.882 (.378)    |
| Marketing research                      | 45                      | 27              | 18              | -1.458 (.145)   |
| Media planning                          | 44                      | 25              | 19              | -2.200 (.028)*  |
| Attitudinal analysis of consumers       | 39                      | 19              | 20              | -3.557 (.000)*  |
| Pre-testing promotions                  | 38                      | 21              | 17              | -2.110 (.035)*  |
| Database development                    | 36                      | 22              | 14              | -.862 (.389)    |
| Demographic analysis of target market   | 34                      | 17              | 17              | -2.802 (.005)*  |
| Psychographic analysis of target market | 33                      | 17              | 16              | -2.452 (.014)*  |
| Post-testing promotions                 | 32                      | 17              | 15              | -2.105 (.035)*  |
| Database management                     | 29                      | 18              | 11              | -.545 (.586)    |

\* p < 0.05

offered by agencies they were asked to indicate the availability of the talents offered by their agencies. They could indicate whether the position was readily, usually, sometimes, rarely or never available. Table 3 shows the rankings of each advertising personnel position according to their degree of availability based on the number of "readily available" positions. The positions that were most readily available were creative services: layout artists, copywriters, and art directors. The research-based positions (marketing analyst and marketing researchers) were not as available as many of the other positions listed and were ranked 15<sup>th</sup> and 16<sup>th</sup> respectively. This indicates that agencies prefer offering the creative and account services to their clients, and that some research skills are left for market research specialists.

#### Client influence on functions

Respondents were then asked to indicate the extent of influence clients have

on their agency's functions. A list of 13 services was presented and respondents indicated the level of influence by using the following scale: no influence, minor influence, major influence, total influence, and non-applicable. The results ranked by client influence, based on the number indicating a "major influence", is summarised in Table 4.

In all cases, respondents indicated that there was some level of influence from their clients. This finding was not surprising since agencies provide the services for their clients. Interestingly, clients most often preferred to be involved in marketing strategy and marketing research activities – followed by copywriting, design services, and media planning. Marketing strategy and marketing research are functions that require intense interaction between agencies and their clients since they often work hand in hand. After all, the sole purpose of marketing research

**Table 3: Availability of Advertising Personnel**

|                             |                | Readily Available | Usually Available | Sometime Available | Rarely Available | Never Available | Total |
|-----------------------------|----------------|-------------------|-------------------|--------------------|------------------|-----------------|-------|
| Layout artists              | < \$10 million | 35                |                   |                    |                  |                 | 41    |
|                             | > \$10 million | 21                | 3                 | 1                  | 1                | 1               | 21    |
| Copywriters                 | < \$10 million | 34                | 4                 |                    |                  |                 | 41    |
|                             | > \$10 million | 20                | 1                 | 3                  |                  |                 | 21    |
| Art directors               | < \$10 million | 31                | 2                 |                    |                  |                 | 38    |
|                             | > \$10 million | 20                | 1                 | 3                  | 1                | 1               | 21    |
| Account coordinators        | < \$10 million | 27                |                   |                    |                  |                 | 34    |
|                             | > \$10 million | 20                | 3                 |                    | 2                | 2               | 20    |
| Media planners              | < \$10 million | 27                | 4                 |                    |                  | 2               | 38    |
|                             | > \$10 million | 18                | 1                 | 4                  | 1                | 1               | 20    |
| Traffic personnel           | < \$10 million | 27                | 3                 |                    |                  |                 | 37    |
|                             | > \$10 million | 17                | 2                 | 1                  | 3                | 4               | 20    |
| Art directors               | < \$10 million | 26                | 4                 |                    |                  | 2               | 37    |
|                             | > \$10 million | 18                | 1                 | 3                  | 2                | 1               | 20    |
| Creative directors          | < \$10 million | 26                | 3                 |                    |                  | 4               | 37    |
|                             | > \$10 million | 17                | 3                 | 4                  |                  | 1               | 21    |
| Mechanical artists          | < \$10 million | 25                |                   |                    |                  | 2               | 37    |
|                             | > \$10 million | 20                | 5                 | 2                  | 3                | 1               | 21    |
| Account executives          | < \$10 million | 25                |                   | 1                  |                  | 2               | 37    |
|                             | > \$10 million | 19                | 5                 | 1                  | 4                | 1               | 21    |
| Media buyers                | < \$10 million | 25                |                   | 4                  |                  | 5               | 38    |
|                             | > \$10 million | 16                | 2                 | 2                  | 2                | 2               | 20    |
| Direct marketing specialist | < \$10 million | 24                | 6                 | 2                  |                  | 3               | 38    |
|                             | > \$10 million | 15                | 3                 | 1                  | 3                | 1               | 20    |
| Account supervisors         | < \$10 million | 23                | 6                 |                    |                  |                 | 38    |
|                             | > \$10 million | 20                | 1                 | 2                  | 1                | 6               | 21    |
| Marketing planners          | < \$10 million | 23                | 5                 | 4                  | 2                | 2               | 36    |
|                             | > \$10 million | 11                | 4                 | 2                  | 1                | 1               | 19    |
| Marketing analysts          | < \$10 million | 23                | 3                 | 5                  | 2                | 3               | 36    |
|                             | > \$10 million | 10                | 4                 | 2                  | 2                | 3               | 21    |
| Marketing researchers       | < \$10million  | 21                | 5                 | 4                  | 3                | 3               | 36    |
|                             | > \$10million  | 10                | 4                 | 2                  | 1                | 3               | 20    |
| Advertising managers        | < \$10million  | 18                | 8                 | 2                  | 2                | 4               | 34    |
|                             | > \$10million  | 13                | 1                 | 1                  | 1                | 2               | 18    |
| Database developers         | < \$10 million | 18                | 4                 |                    | 5                | 2               | 36    |
|                             | > \$10 million | 12                | 2                 | 7                  | 2                | 3               | 19    |
| Broadcast producers         | < \$10 million | 17                | 7                 | 3                  |                  |                 | 35    |
|                             | > \$10 million | 17                | 3                 | 1                  | 5                | 3               | 21    |
| Broadcast directors         | < \$10 million | 17                | 6                 | 6                  | 3                | 2               | 34    |
|                             | > \$10 million | 12                | 1                 | 2                  | 1                | 3               | 19    |
| Legal advisors              | < \$10 million | 17                | 2                 | 6                  | 5                | 5               | 35    |
|                             | > \$10 million | 10                | 3                 | 2                  | 2                | 3               | 20    |
| Brand managers              | < \$10 million | 12                |                   | 3                  | 5                | 8               | 35    |
|                             | > \$10 million | 8                 | 7                 | 1                  | 1                | 6               | 16    |
| Cultural advisor            | < \$10 million | 10                | 7                 | 6                  | 5                | 7               | 35    |
|                             | > \$10 million | 6                 | 2                 | 4                  | 2                | 6               | 20    |
| Copy translators            | < \$10 million | 10                | 8                 | 4                  | 7                | 6               | 35    |
|                             | > \$10 million | 3                 | 2                 | 5                  | 2                | 7               | 19    |

**Table 4: Extent clients influence the agency's functions**

|   | No Influence | Minor Influence | Major Influence | Total Influence | Not Applicable | No of Responses |
|---|--------------|-----------------|-----------------|-----------------|----------------|-----------------|
| Marketing strategy                      |              |                 |                 |                 |                |                 |
| < \$10 million                          |              | 7               | 28              | 1               | 1              | 38              |
| > \$10 million                          | 1            | 3               | 15              | 1               | 1              | 20              |
| Marketing research                      |              |                 |                 |                 |                |                 |
| < \$10 million                          | 3            | 5               | 21              | 2               | 4              | 35              |
| > \$10 million                          | 1            | 3               | 13              | 1               | 2              | 20              |
| Design services                         |              |                 |                 |                 |                |                 |
| < \$10 million                          | 3            | 15              | 19              |                 |                | 39              |
| > \$10 million                          | 2            | 8               | 9               | 2               | 1              | 20              |
| Copy writing                            |              |                 |                 |                 |                |                 |
| < \$10 million                          | 2            | 18              | 17              |                 |                | 39              |
| > \$10 million                          | 2            | 8               | 10              | 2               |                | 20              |
| Media planning                          |              |                 |                 |                 |                |                 |
| < \$10 million                          | 4            | 10              | 15              |                 |                | 35              |
| > \$10 million                          |              | 12              | 8               | 1               | 5              | 20              |
| Psychographic analysis of target market |              |                 |                 |                 |                |                 |
| < \$10 million                          | 6            | 4               | 14              |                 | 7              | 31              |
| > \$10 million                          | 1            | 8               | 8               |                 | 3              | 20              |
| Demographic analysis of target market   |              |                 |                 |                 |                |                 |
| < \$10 million                          | 2            | 8               | 13              |                 | 7              | 30              |
| > \$10 million                          | 1            | 6               | 10              |                 | 2              | 19              |
| Direct-response marketing               |              |                 |                 |                 |                |                 |
| < \$10 million                          | 5            | 13              | 12              |                 | 3              | 34              |
| > \$10 million                          | 2            | 11              | 6               | 1               | 1              | 20              |
| Attitudinal analysis of consumers       |              |                 |                 |                 |                |                 |
| < \$10 million                          | 4            | 11              | 11              |                 | 5              | 31              |
| > \$10 million                          |              | 9               | 8               |                 | 3              | 20              |
| Internet advertising strategy           |              |                 |                 |                 |                |                 |
| < \$10 million                          | 2            | 13              | 11              |                 | 1              | 28              |
| > \$10 million                          | 2            | 10              | 6               | 1               | 1              | 19              |
| Production of commercials               |              |                 |                 |                 |                |                 |
| < \$10 million                          | 7            | 15              | 8               | 1               |                | 34              |
| > \$10 million                          | 2            | 11              | 6               | 1               | 3              | 20              |
| Pre-testing promotions                  |              |                 |                 |                 |                |                 |
| < \$10 million                          | 5            | 8               | 7               |                 | 8              | 29              |
| > \$10 million                          | 1            | 6               | 9               | 1               | 4              | 20              |
| Post-testing promotions                 |              |                 |                 |                 |                |                 |
| < \$10 million                          | 7            | 8               | 7               |                 | 7              | 30              |
| > \$10 million                          | 1            | 7               | 8               | 1               | 4              | 20              |

is to help decision-makers make informed decisions, and it is marketing research that often guides advertisers' marketing strategies. Since marketing strategies impact advertisers' performance for several years, there is little room for error. So advertisers prefer to be closely involved in the process. Clients indicated that they prefer to be less

involved in the actual implementation of advertising activities, which include pre- and post-testing of promotions, as well as production of commercials. This may be attributed to the fact that more specialised skills are needed for these activities and the clients, therefore, prefer to leave them in the control of advertising experts.

## Discussion

The objective of this paper was to enhance our understanding of the services offered by advertising agencies and the advertisers' influence on agency functions, with a particular focus on the research-related services offered by the agencies. The survey was completed by 68 managing directors from advertising agencies across Australia. As for the services offered to clients, the main services offered by over 90% of the agencies were creative ones: copywriting, creativity, and graphic design services; with marketing research services being offered by 70% of the respondents. Creative positions (layout artists, copywriters, and art directors) – which are typically the heart of advertising agency activities – were the positions that the agencies had readily available while the research-based positions, marketing analyst and marketing researchers ranked much lower on the list. This indicates that agencies prefer offering the creative and account services to clients, and that while some research services are offered and some have them readily available, most research skills are left to the abilities of market research specialists, such as market research companies.

The extent clients influence agency operations indicate that they indeed play an important role in the process to ensure that they obtain the results they are seek-

ing from their promotion efforts. From the results, marketing strategy and marketing research are areas where clients have a major influence. There is less influence in research activities that are implemented like pre-testing, post-testing promotions, and production of commercials, where clients leave the more specialised activities to the experts.

## Conclusion

In general, it appears that while creative and account management services are extremely important for advertising agencies in Australia, a full line of marketing research services are still offered by a number of agencies. In particular the more general marketing research services are offered and are readily available to their clients, yet they are also the services that have a major influence from clients. Further research should be undertaken to determine the use of market research by advertising agencies and how this is used in campaign creation and management. Analysing the link between market research services and agency-client relationship would also be worthwhile in the future to aid our understanding of its importance in the advertising process. As clients seem to have an influence on agency functions, it is important to understand what clients want so that agencies can better serve them in the future.

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