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The Forrester Wave™: US Interactive Agencies — Strategy And Execution, Q3 2009

by Sean Corcoran
for Interactive Marketing Professionals



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R/GA, VML, Sapient Interactive, And OgilvyInteractive Lead With Several Close Behind

by **Sean Corcoran**

with Peter Sargent, Michael Greene, and Jennifer Wise

EXECUTIVE SUMMARY

Forrester's evaluation of the strategy and execution capabilities of interactive agencies across 39 criteria finds that the market has matured considerably in the past 18 months. The market is now ready to take a big step to join, and in some cases even replace, traditional agencies in leading marketing strategy for top brands. In the current environment, R/GA, VML, Sapient Interactive, and OgilvyInteractive lead a strong group of agencies because of their overall strategic skills, execution and development capabilities, measurement and analytics skills, social and emerging media prowess, unique company visions, and high client ratings. Wunderman, Razorfish, and Organic are also Leaders in the space, and Strong Performers including RAPP, Drafftcb, Rosetta, and AKQA were close behind.

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Forrester conducted services evaluations in Q2 2009 and interviewed 12 agencies and 33 client references.

Related Research Documents

["The Forrester Wave™: Interactive Marketing Agencies — Web Design Capabilities, Q2 2009"](#)
June 5, 2009

["Navigating The Agency Landscape"](#)
May 21, 2009

["The Connected Agency"](#)
February 8, 2008

A MATURE MARKET IS READY TO MOVE OUT OF THE BACKSEAT

Over the past 18 months, the top digital agencies have reached their potential as interactive-only service providers. The market has matured to the point that there are only subtle differences between the agencies selected for this Wave™ evaluation. And while these interactive agencies spent several years in subservient roles, the leading digital agencies are now ready to play more strategic roles for their clients. They will begin to join traditional agencies at the head of the agency table and, in some cases, completely supplant them as the lead agency partner driving marketing and business strategy through the intersection of communication and technology. Several recent factors have led to this trend including:

- **Clients are more than satisfied with their interactive agencies.** All of the agencies' client references in this wave are at least satisfied with their own agencies' performance, and the great majority of clients think their interactive agencies are performing beyond expectations. For example, the average score the agencies received from the 33 client references for their overall performance is 4.3 out of 5. This maturity factor is also reflected in other areas in which Forrester has evaluated interactive agencies — specifically our recent Wave on Web design.¹
- **Interactive grows at the expense of traditional marketing.** Despite a poor economic climate, marketers are shifting much of their budgets toward online marketing — most of that coming from traditional media such as print and radio.² Also, many of the traditional mediums, most significantly television, are moving to digital platforms where agency skills in technology and analytics are becoming more and more crucial to success. Under these conditions, many senior marketers are seeing the opportunity to “hit the reset button” on their overall marketing plans.³
- **Interactive agencies are expanding their roles.** Due to their skills in areas such as technology, analytics, and social marketing, several agencies are beginning to play bigger roles for their clients by delivering on programs and campaigns outside of their typical domains. For instance, Razorfish developed and bought an integrated TV and Web campaign for all detergent.⁴ AKQA, on the other hand, worked with Fiat to create “eco:Drive,” an easy-to-use computer application that connects cars to PCs and gives drivers advice on how to change their driving behavior to cut down on carbon dioxide emissions.⁵
- **Analytics are evolving with plenty of room to grow.** Most of the top interactive agencies have developed dedicated analytics teams staffed with experienced analysts, unique proprietary tools, and statistical models to analyze and predict both online and offline data. However, marketing measurement is still far from a perfect science, and this is reflected in most of the client scores for measurement and analytics, which are approximately 5% lower than other major criteria.

INTERACTIVE AGENCIES EVALUATION OVERVIEW

To assess the state of the interactive agency market and see how the agencies stack up against each other, Forrester evaluated the strengths and weaknesses of top full-service interactive agencies.

Evaluation Criteria Target Strategy And Implementation Capabilities

Forrester evaluated the strengths and weaknesses of the top interactive agencies. After examining past research, user need assessments, and agency and expert interviews, we developed a comprehensive set of evaluation criteria. Because interactive marketing is more than building Web sites — and because we have a companion Forrester Wave on Web design agencies — this evaluation looks at how firms lead and implement digital strategies and programs, not at their Web development capabilities. Therefore, we evaluated agencies against 39 criteria across three high-level buckets:

- **Current offering.** To gauge each agency's capabilities in developing and measuring interactive programs, we reviewed their strategy, development and execution, measurement and analytics, emerging media, and account management services. For each major criterion, we evaluated their processes and methodologies, staff and skills, tools, and overall client ratings.
- **Strategy.** We also looked at each agency's forward-looking business strategy to assess its potential capability in meeting clients' demands over the next two to five years. We evaluated the strength of each agency's management teams, company vision, product and services road map, discovery and innovation initiatives, its focus (key industries or audience types), and reach (geographic presence).
- **Market presence.** Finally, we evaluated revenues, revenue growth, employee base, and the commitment and sophistication of client reference accounts. Due to Sarbanes-Oxley regulations, the agencies disclosed to Forrester revenue information that cannot be shared publicly. We assigned scores that corresponded with that data, but to maintain confidentiality while giving readers a sense of the revenue ranges, we published data from *Advertising Age's* 2008 Top 50 Digital Agencies Report.⁶

Evaluated Agencies Meet Size And Visibility Criteria

The interactive agency industry encompasses literally hundreds, if not thousands, of service providers with varying levels of expertise and specialization. Given our lengthy evaluation process, we limited the number of agencies that we included in this evaluation. To begin our selection process, we fielded surveys from more than 30 agencies included in *Advertising Age's* "Top 50 Digital Agencies" report. Forrester included 11 agencies (with the exclusion of Digitas, who declined to fully participate but is still included in this analysis) in the assessment: AKQA, Draftfcb, OgilvyInteractive, Organic, RAPP, Razorfish, R/GA, Rosetta, Sapient Interactive, VML, and Wunderman. Each of these agencies has (see Figure 1):

- **A total annual revenue of more than \$100 million.** To determine who the largest agencies in the space actually are, we estimated each agency's annual revenue. While there are dozens of interactive agencies with more than \$25 million in annual revenue, those selected were from a smaller group with an estimated minimum of \$100 million in 2008.

- **Five new client acquisitions and a 90% client retention rate.** To ensure that we included agencies with positive momentum, we only selected agencies with a minimum of five new enterprise-level (\$1 billion-plus revenue) client wins and a more than 90% client retention rate in 2008.
- **Seven of nine selected service offerings.** There are literally hundreds if not thousands of interactive service providers — many offering a few or even just one particular service. To qualify as a full-service interactive agency that does marketing and strategy, we only selected agencies that had at least seven of nine services: digital strategy, Web development, technology architecture and support, creative (advertising) services, email/CRM, analytics, media planning and buying, search marketing, and emerging media.
- **At least five competitive mentions.** We used agencies to benchmark each other and only selected agencies that had a minimum of five mentions as a top three competitor by the more than 30 agencies screened for this Wave.

INTERACTIVE AGENCIES STRUGGLE TO DIFFERENTIATE

The evaluation uncovered a market in which most agencies are at least competent across most major criteria and received high scores from clients. Yet, clients are also hard-pressed to discern the capabilities of one leading agency from another (see Figure 2). The agencies break down into two groups:

- **R/GA, VML, Sapient, OgilvyInteractive, Wunderman, Razorfish, and Organic are Leaders.** Due to their ability to perform at high levels across most major criteria including digital strategy, development and execution, measurement and analytics, social and emerging media, and a unique vision with a clear road map, these agencies are the Leaders in the space.
- **RAPP, Draftfcb, Rosetta, and AKQA are Strong Performers.** Just outside the Leaders' circle fall these four agencies that score well in many of the major criteria but not as consistently as the Leaders. Yet like many of the Leaders, they excel in specific areas such as audience insight, emerging media, and measurement and analytics.

This evaluation of the interactive agency marketing and strategy capabilities market is intended to be a starting point only. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 1 Evaluated Vendors: Vendor Information And Selection Criteria

Vendor	Total US interactive marketing employees	Date evaluated
AKQA	337	April 2009
Draftfcb	159	April 2009
OgilvyInteractive	2,200*	April 2009
Organic	550-plus	April 2009
RAPP	900*	April 2009
Razorfish	1,600	April 2009
R/GA	620	April 2009
Rosetta	580	April 2009
Sapient Interactive	1,018	April 2009
VML	600-plus	April 2009
Wunderman	850-plus	April 2009
Digitas	2,200	April 2009

Vendor qualification criteria

Interactive agencies included in this evaluation had a minimum of \$100 million in interactive revenue in 2008 (based on *AdAge's* 2008 Top 50 Digital Agencies report).

The agencies had more than a 90% client retention rate and acquired at least five new clients in 2008.

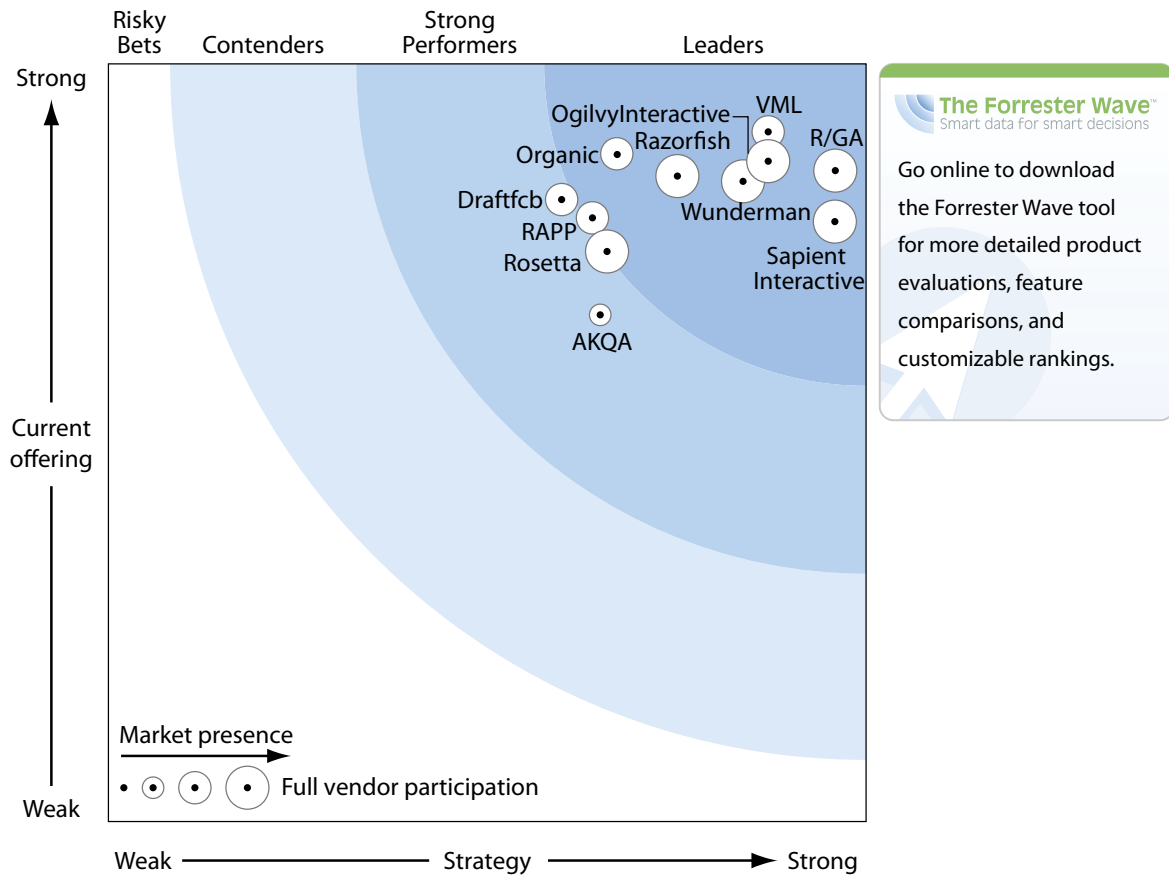
The agencies offered at least seven of the following nine interactive services: digital strategy, Web development, technology architecture and support, creative (advertising) services, email/CRM, analytics, media planning and buying, search marketing, and emerging media.

The agencies received at least five mentions as a top three competitor by the other 35 agencies invited to be screened for the Wave.

*Number is approximate

Source: Forrester Research, Inc.

Figure 2 Forrester Wave™: US Interactive Agencies — Strategy And Execution, Q3 2009



The Forrester Wave™
 Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

Figure 2 Forrester Wave™: US Interactive Agencies — Strategy And Execution, Q3 '09 (Cont.)

	Forrester's Weighting	AKQA	Draftfcb	OgilvyInteractive	Organic	RAPP	Razorfish	R/GA	Rosetta	Sapient Interactive	VML	Wunderman
CURRENT OFFERING	50%	3.35	4.10	4.36	4.39	3.99	4.25	4.30	3.75	3.95	4.56	4.22
Background information	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Strategy	35%	3.20	4.17	3.98	4.72	4.18	4.03	4.47	4.35	3.60	4.87	3.82
Development and execution	15%	3.65	3.30	4.34	4.04	3.72	4.21	4.48	4.17	4.45	4.20	4.50
Measurement and analytics	25%	3.04	4.38	4.63	4.42	4.08	3.92	3.38	3.92	4.00	4.08	4.83
Emerging media capabilities	25%	3.68	4.20	4.65	4.10	3.80	4.90	4.88	2.50	4.10	4.83	4.00
Account management	0%	4.00	4.50	4.83	4.83	3.83	4.13	4.50	4.67	3.83	4.67	4.83
Cost	0%	4.00	4.00	3.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00
STRATEGY	50%	3.25	3.00	4.35	3.35	3.25	3.75	4.80	3.30	4.80	4.35	4.20
Company vision	60%	3.00	3.00	4.00	3.00	3.00	3.00	5.00	3.00	5.00	4.00	4.00
Strength of management team	5%	4.00	3.00	4.00	3.00	4.00	4.00	5.00	4.00	4.00	4.00	4.00
Product/services road map	20%	4.00	3.00	5.00	4.00	4.00	5.00	4.00	5.00	5.00	5.00	5.00
Discovery and innovation	15%	3.00	3.00	5.00	4.00	3.00	5.00	5.00	2.00	4.00	5.00	4.00
Focus and reach	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00	5.00	5.00
MARKET PRESENCE	0%	2.68	3.34	4.78	3.81	3.93	4.84	4.06	4.00	4.72	3.71	4.15
Clients	25%	3.25	3.00	4.37	3.88	3.62	4.38	4.13	4.75	4.13	4.87	4.50
Financials	50%	2.10	4.05	5.00	4.05	4.05	5.00	4.05	4.00	5.00	3.10	4.05
Internal resources	25%	3.25	2.25	4.75	3.25	4.00	5.00	4.00	3.25	4.75	3.75	4.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders Excel In Almost All Things Digital

- **R/GA.** Often lauded for its creative design capabilities, this Interpublic agency is a Leader due to its commitment to identifying new trends and for frequently being the first to implement new technologies into its programs and campaigns. To stay ahead of the competition, the agency has invested in several proprietary tools and practices such as its DEQQ primary research tool, its in-house digital studio used to develop high-quality low-cost digital video, and its FutureVision program dedicated to looking out at the short- and long-term marketing landscape. The agency scores highly across all major criteria and especially high for strategy and emerging media. The agency has a vision to be the “Agency for the Digital Age” positioning itself as more of a strategic business and design agency through its approach of platforms and campaigns. R/GA is best

suiting for brands with established success in the digital realm looking to take the next step in building innovative digital programs (such as Nike+) and for challenger brands ready to take on more advanced competitors in the digital space.

- **VML.** VML, part of the WPP network, leads because of its competence in a broad range of digital services, including top ratings for strategy, account management, and emerging media capabilities. The agency has a large base of people dedicated to interactive services along with proprietary tools for social monitoring, content management, and valuing brand assets. In addition, VML has a research team dedicated to social media, and it helps lead the Digital Acceleration training program across other WPP agencies. In addition, because of its commitment to its “VML Partnership Activation” approach to working with clients and other agencies, clients attest to its great collaboration skills. VML is best suited for brands looking to advance their overall digital strategy and skill set, while incorporating an interactive agency partner that works well with traditional agencies for more seamless integration.
- **OgilvyInteractive.** A large agency in the WPP network with more than 1,200 people working on digital programs, OgilvyInteractive is a Leader because of its high level of competence across all major criteria — specifically measurement and analytics, account management, and social and emerging media. The agency has a large dedicated analytics team and wide array of proprietary tools and models for audience insight, social and emerging media, and analytics. With traditional powerhouse Ogilvy as its parent company, OgilvyInteractive is able to offer marketers a holistic agency that can work across both online and offline marketing and manage a brand under a single agency umbrella. Moreover, marketers in need of more advanced analytics will find that OgilvyInteractive rivals any other competitor.
- **Sapient Interactive.** Unlike most agencies that are ramping up technology resources, Sapient Interactive has a technology foundation and is aggressively expanding its marketing services. In fact, Sapient recently acquired traditional agency Nitro Group.⁷ Sapient Interactive is competent across all major criteria and it especially excels at producing high-quality digital campaigns and applications because of its deep understanding and use of innovative technology. Sapient Interactive’s creative capabilities have expanded beyond most other digital agencies to include long- and short-form video, gaming, mobile applications, and even 3D modeling and animation. The agency has worked with Coca-Cola to develop innovative applications for the brand that has resulted in popular iPhone applications as well as interactive vending machines. Sapient Interactive makes sense for marketers looking to advance their digital innovation, technology architecture, and overall digital strategy.
- **Wunderman.** Wunderman, part of the WPP network, has a heritage in direct marketing and consists of a network of digital agencies including ZAAZ, Blast Radius, and Design Kitchen. For this particular Wave, we focused our evaluation on ZAAZ. ZAAZ is a Leader because it is a top performer for development and execution of high-quality digital programs as well as

measurement and analytics. ZAAZ was one of the main drivers behind WPP's investment in the Web analytics Leader Omniture and members of senior management have even authored a popular book on marketing measurement. Overall, the Wunderman network makes sense for marketers looking to leverage a network of holistic agency capabilities founded in direct marketing. Marketers will be best served to consider ZAAZ particularly if they wish to advance their overall optimization and analytics capabilities.

- **Razorfish.** Currently owned by Microsoft, Razorfish is a Leader because of its ability to develop highly rated digital strategy, its proficiency with emerging media, and its above average scores in development and execution of high-quality interactive campaigns and applications, measurement and analytics, and account management. The agency has several unique and proprietary tools and programs — especially for training and maintaining skills to keep them ahead of the curve. Razorfish is best suited for marketers seeking a large and capable digital agency to lead strategy and provide a full suite of services. In addition, the agency has begun to expand its capabilities to traditional media such as TV and could play a role as a more holistic agency in the next year.
- **Organic.** Organic, part of the Omnicom network, scored well in most major criteria. The agency excels in strategy development, audience insight, analytics, and account management. Organic's vision is to become marketing advisor to its clients with an approach called "Total Experience." This approach recognizes that digital is ubiquitous and balances creative and advanced analytics capabilities. The agency has also developed a media mix model that at least one large brand name client has adopted across both online and offline data. Organic is best suited for marketers seeking a strong creative agency with advanced analytics capabilities.

Strong Performers Stand Out In Several Digital Capabilities

- **RAPP.** Part of the Omnicom network, RAPP has a heritage in direct marketing but now does the majority of its work in digital. RAPP didn't score as high as the Leaders in areas such as emerging media and account management. However, the agency is proficient in analytics and, because of its specialized Cultura (cultural anthropology) team and proprietary tools, is especially adept at audience insight. The agency has also created several popular social media programs such as the Travel Channel "Kidnap!" Facebook application. RAPP is recommended for marketers looking for an agency with a foundation in direct marketing to redefine their digital strategy and enhance their analytics — especially when integrating within a holistic view of marketing.
- **Draftfcb.** Draftfcb, part of the Interpublic network, is a holistic marketing agency that offers a full suite of interactive services. While Draftfcb's dedicated digital teams aren't as robust as those of the leading agencies and Draftfcb doesn't tend to take on digital-only work, the agency is skilled in several areas. For instance, Draftfcb scores very well in strategy and measurement — especially due to several proprietary tools for audience insight and analytics such as Targetscape

for social media listening, search-based perception mapping for gathering insight, and its “Smart Wall” for data visualization. The agency uses a new creative expression — “6.5 seconds that matter,” focusing on the short attention span of today’s consumer — as the foundation of its work. Draftfcb makes the most sense for marketers seeking a holistic agency that combines creative development, direct marketing, and interactive advertising services under one umbrella.

- **Rosetta.** Rosetta is an independent agency that has recently increased its size and services with the acquisition of the Web consultancy Brulant. Rosetta doesn’t score as well as the Leaders in areas such as social and emerging media but with a heritage in developing proprietary segmentation tools is especially adept at audience insight. The agency looks to develop more “personally relevant” brands through a mix of digital tools, and it holds several patents on the intellectual property underpinning its Personality-based marketing approach. The agency scores well in most criteria, and clients rate it highly for account management. Rosetta makes sense for marketers seeking to redefine their target audience and activate it online through a full suite of interactive services — especially in the healthcare, CPG, retail, and financial industries.
- **AKQA.** AKQA is an independent agency with a full suite of digital services and, in some cases, already acts as a lead agency developing holistic marketing strategy for clients. AKQA doesn’t score as highly as the Leaders in areas such as audience insight, and the agency’s dedicated analytics team is smaller than most major competitors. AKQA is strongest in its ability to develop high-quality campaigns and applications. The agency also excels in emerging media where it has invested in building dedicated film and mobile practices to stay ahead of the curve. The agency’s vision is to become the “most respected agency in the digital age,” and it plans to continue to invest in innovation as well as grow its global presence. AKQA makes sense for marketers seeking a creative interactive agency to build overall digital strategy and develop innovative applications in social and emerging media.
- **Digitas.** Digitas, part of the Publicis network, is one of the largest interactive agencies in the US (and the world). While the agency declined to fully participate in the Wave, Forrester did interview it for the research. Digitas is strong in most criteria and especially adept at measurement and analytics. Without a full evaluation of Digitas, it is difficult to articulate its unique strengths. However, the agency should be considered by marketers who seek a large agency with a full suite of digital services.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of two data sources to assess the strengths and weaknesses of each solution:

- **Agency surveys.** Forrester surveyed agencies on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed agency surveys, we conducted agency calls with all participants to gather details of agency qualifications.
- **Client reference calls.** To validate agency qualifications, Forrester also conducted reference calls with three of each agency's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of agencies that meet our criteria to be evaluated in this market. From that initial pool of agencies, we then narrow our final list. We choose these agencies based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate agencies that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and agency and expert interviews, we develop the initial evaluation criteria. To evaluate the agencies and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the agencies for their review, and we adjust the evaluations to provide the most accurate view of agency offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the agencies based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update agency evaluations regularly as product capabilities and agency strategies evolve.

ENDNOTES

- ¹ In June 2009, Forrester evaluated the Web design capabilities of leading interactive marketing agencies. Our analysis identified Sapient, imc2, Razorfish, and IconNicholson as Leaders and noted the maturity of the market as demand for Web design remains strong. See the June 5, 2009, “The Forrester Wave™: Interactive Marketing Agencies — Web Design Capabilities, Q2 2009” report.
- ² When asked how they will fund increases in interactive marketing budgets, 60% of marketers stated they would do so by shifting money away from traditional marketing. Source: March 2009 US Interactive Marketing Forecast Online Survey and Shar VanBoskirk, “Transform Marketing Through Interactive Channels,” Forrester’s Marketing Forum, April 23, 2009.
- ³ Source: Brian Morrissey, “Marketing Execs Hit the Reset Button,” *Adweek*, June 26, 2009 (http://www.adweek.com/aw/content_display/news/agency/e3i5eb34953fa8750477b7ed9e8f973be50).
- ⁴ Source: Brian Morrissey, “Razorfish Tries Out TV,” *Adweek*, April 6, 2009 (http://www.adweek.com/aw/content_display/creative/news/e3ie2a94edbc5b0a7c15ca35f733864dba8).
- ⁵ Source: AKQA’s Fiat eco:Drive project (http://awards.akqa.com/Awards2008/IAB/Fiat_eco_Drive/default.html).
- ⁶ See *AdvertisingAge*’s 2008 Top 50 Digital Agencies Report. Source: “Digital Agencies,” Datacenter, *AdvertisingAge* (<http://adage.com/datacenter/>).
- ⁷ Source: Vranica, Suzanne, “Sapient To Acquire Nitro Group,” *The Wall Street Journal*, June 17, 2009 (<http://online.wsj.com/article/SB124519079804720687.html>).

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