The evolution of agency-client relationships within the communication network in Italy: the perspective of communication partners

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Abstract

Purpose of the paper. *Due to the digital revolution, the agency-client relationship has become more complex. Fitting into the recent academic literature on this topic, this study aims to deepen and conceptualise the agency-client relationship evolution in Italy. We adopted a twofold perspective: (i) "transversal", to acquire the holistic vision of emerging issues of the new communication scenario and their consequent effects on the relational dynamics of agency-client for all the players (i.e., advertising and PR agency, media centre, digital agency) and (ii) "vertical", to better emphasise the specificities of each category of the agency.*

Methodology. *Qualitative exploratory research was conducted based on in-depth interviews (n=53) with senior consultants belonging to different categories of players within the communication network. The data were analysed using qualitative content analysis and the cognitive mapping technique.*

Findings. *By adopting the communication partners perspective, two interpretative frameworks were developed with respect to (1) key emerging issues that define the new communication scenario and (2) consequent effects on the evolution of the agency-client relationship. Specific themes emerged in the relational dynamics of the agency's various categories.*

Research limits. *This study shows the limits of qualitative research on the non-representativeness of results.*

Practical implications. *The holistic interpretation by the various actors of key issues that qualify the new scenario, along with the understanding of their consequent effects on agency-client relationships, could contribute to improving the performance of each player and, in this way, of the entire communication network.*

Originality of the paper. *The study explores the agency-relationship evolution in Italy, a context that has still not been studied in-depth, while presenting relevant aspects of marketing communication. Additionally, the article proposes a twofold vision of the client-agency relationship evolution, i.e."transversal" and "vertical", for the first time.*

Key words: communication partners; agency-client relationships; communication network; digital revolution; integrated marketing communication; cognitive mapping technique

1. Introduction

Due to the digital revolution and the consequent transformation of *integrated marketing communication* (IMC) (Mulhern, 2009; Winer, 2009), the topic of agency-client relationships has become more complex (Keegan *et al.*, 2017).

In the market of communication services, several specialised players have appeared, to the point that advertisers have begun to involve a plurality of partners in the development of integrated campaigns, creating multiple relationships that make up the *communication network* (Grant and McLeod, 2007). In this context, significant critical issues emerge in terms of the coordination of various partners, distribution of power, growing conflict among network nodes (Grant *et al.*, 2012; Biraghi, 2017) and progressive deterioration of relationships (Forrester Report, 2010; Thomas, 2015; Diaz-Mendez and Saren, 2019; Mortimer and Laurie, 2019). This communication scenario is made more complex by interrelated phenomena, i.e., the growing centrality of empowered consumers in brand value co-creation (Vollero *et al.*, 2019), the multiplicity of digital and traditional media used in an integrated way, and the need for new solutions to optimise the return on investment in communication, especially in the short term. Considering this complexity, as stated by Taylor (2017), what truly seems central is the construction of a "good" relationship between communication agency and client (or advertiser). This is truer still if we consider the significant role that agencies can play in the development of advertisers' marketing strategies (Kegan *et al.*, 2017) and in helping clients reap the benefits of IMC (Mortimer and Laurie, 2019), particularly in the new hybrid and interactive communication scenario (Vernuccio *et al.*, 2012).

However, in view of growing interest in the agency-client relationship, there are still several aspects to be explored, as shown by recent calls for research on this issue (e.g., Keegan *et al.*, 2017).

First, it seems relevant to understand whether and how relational dynamics can vary according to the type of agency involved in the relationship (Keegan *et al.*, 2017). Previous research on the evolution of relationships (e.g., Laurie and Mortimer, 2019; Mortimer and Laurie, 2019) considers the "agency" category in a homogeneous way, thus underestimating the variety of types within it or focusing only on advertising and/or PR agency. Less attention is paid to the relational dynamics that involve other partners of the communication network, i.e. the media centre and the digital agency.

Second, given the importance of the *country-specific* cultural perspective in directing the evolution of the relationship, there is an opportunity to explore this issue in countries other than those on which previous studies have focused (mainly the UK and USA) (Keegan *et al.*, 2017).

From this point of view, Italy seems to be an interesting context to investigate for several reasons. First, our country has suffered from the financial crisis more than other European countries, showing a significant contraction in communication spending (Mindshare, 2016; MarketLine, 2019). In terms of the media mix, there has been a progressive increase in investments in digital advertising, while those in print media have been drastically reduced. Television continues to be the main advertising channel (unlike other countries such as the UK and France), although spending is declining in favour of digital media advertising (IAB Europe, 2018). Today, Italy is in fourth place for advertising investment at the European level and fifth for digital advertising investment (MarketLine, 2019), showing slow growth of the advertising market. Therefore, the digitisation process has seemingly still not reached the level of maturity that has been found in other European countries like the UK, Germany and France.

Finally, almost all of the agencies belonging to large communication networks (e.g., *WPP, Omnicom, Publicis, Interpublic*) operate in Italy, therefore it is possible to easily acquire the point of view of players who know the local market well but have a strong international perspective at the same time.

Based on these factors and in the absence of studies conducted in Italy, this work aims to deepen the agency-client relationship evolution in our country in detail by adopting a twofold perspective:

(i) *transversal (horizontal)*, to acquire a holistic vision for all players (i.e., advertising and PR agency, media centre, digital agency) and to develop two interpretative frameworks that represent emerging issues of the new communication scenario and their consequent effects on the relational dynamics of agency-client;

(ii) *specific (vertical)*, to better highlight the specificities of each category of the agency, both traditional (i.e., advertising agency, PR agency, media centre) and new (digital agency).

In this way, we identify the main relational issues and challenges to be addressed in order to improve the performance of each category of players and the entire communication network.

The paper is structured as follows: in the following paragraph, we will describe the literature on the evolution of the agency-client relationship (§ 2.1), and then we will introduce the purpose of the study (§ 2.2). After describing the method (§ 3), the main results will be presented (§ 4). The work ends with the conclusion, which presents the academic contribution of the study (§ 5.1), its managerial implications (§ 5.2), and evidence of its limitations as well as further research (§ 5.3).

2. Theoretical background and research questions

2.1 The evolution of agency-client relationships

Studies on agency-client relationships began to develop in the 1950s, with a growing interest in the subject from the late 1990s onwards (Keegan *et al.*, 2017), when the effects of the digital revolution began to mature and, as a result, the push towards the evolution of IMC emerged (Šerić *et al.*, 2015). The latter is characterised by the shift from the supremacy of traditional *firm-centric* and *push (inside-out)* communication models to the increasing relevance of *consumer-centric, pull (outside-in)* and s*ocial (outside-out)* models (Bruhn and Schnebelen, 2017).

The evolution of the consumer's role and the media landscape has led to new strategic and organisational challenges for all communication players (Vernuccio and Ceccotti, 2015) and to new agency-client relational dynamics. According to some authors, the diffusion of social media and "digital proliferation" are at the basis of *the increase of the relational complexity between the advertiser and their communication partners* (Turnbull and Wheeler, 2016; Keegan *et al.*, 2017; Taylor, 2017; Huges *et al.*, 2018; Mortimer and Laurie, 2019).

First, relationships must be rethought in light of growing consumer protagonism and the need to consider the consumer as a partner in the creation of brand value and not as a simple communication target (Gambetti *et al.*, 2016). Moreover, we are witnessing the specialisation of the skills of communication partners and the consequent proliferation of specialised and hyper-specialised agencies (Ceccotti, 2018). Therefore, clients increasingly turn not only to advertising agencies but also to other communication specialists. This has led to the overcoming of traditional dyadic agency-client logic and to the *emergence of the communication network* (Grant and McLeod, 2007) or *specialised network* (Ceccotti and Vernuccio, 2014). The latter includes all the multiple relationships that exist between the advertiser and the various communication partners involved in the development of an integrated campaign (Eagle and Kitchen, 2000): the advertising agency, the media centre and specialised agencies.

In this context, coordination among the various players becomes a central issue (Kitchen *et al.*, 2007; Keller, 2016). However, in the literature, there are no clear positions as to whether the advertiser or the agency should act as the coordinator. While some studies have emphasised the fundamental coordinating role played by the client (Beard, 1996; Kitchen *et al.*, 2009; Kliatchko, 2009), others have highlighted the central contribution provided by the account planner of the advertising agency (Crosier *et al.*, 2003) or the media centre (Grant and McLeod, 2007). Recently, some authors have highlighted the *increasing power of the client within the network*. Indeed, advertisers could have the task of fostering collaboration among the different partners and defining clear remuneration systems that can take into account the individual agency contribution, the commitment to collaboration among agencies and the overall success of the project (Laurie and Mortimer, 2019). However, communication agencies believe that the client has not yet fully taken on this role (Mortimer and Laurie, 2019) and, therefore, conflicts of interest and opportunistic behaviour may prevail within the network (Grant *et al.*, 2012).

The agency-client relationship should be inspired by the logic of medium-to-long-term partnership (Durkin and Lawlor, 2001; Mortimer and Laurie, 2019). This happens when there is continuity in the relationship, high complexity in the consulting service, shared objectives, affinity among the parties (e.g., in terms of size of the advertiser and the agency) and, finally, a dense network of formal and informal contacts between agency and client (Marcati, 1997; Vollero, 2008).

However, studies on the evolution of the agency-client relationship have shown the *progressive deterioration of relational dynamics* and the gradual disappearance of this logic of medium-to-long-term partnership for different reasons. According to Heo and Sutherland (2015), there has been a reduction in relational transparency, with a reduction of information exchanges among the players (Mortimer and Laurie, 2019). Moreover, there is a divergence in the objectives of the client and the agencies: while the former seems more oriented towards obtaining results in the short term (Vernuccio *et al.*, 2018), the latter are often more inclined towards creative experimentation or triggering mechanisms of co-creation that require a longer time frame (Gambetti *et al.*, 2016). Agencies do not feel very involved in the client's strategic decisions and see the standing of the provided service become progressively reduced (Laurie and Mortimer, 2019). For the client, this can be attributed to some types of partners' low propensity to change, like in the case of advertising agencies that have not been able to evolve proactively and sometimes show signs of resistance to change (Durkin and Lawlor, 2001; Wagler, 2013; Ceccotti and Vernuccio, 2014; Mortimer and Laurie, 2017). Moreover, in the face of the specialisation of some agencies, the client might note the partner's inability to consider the integrated campaign as a whole (Thomas, 2015; Mortimer and Laurie, 2019).

However, the deterioration of the relationship can also be attributed to the evolution of the client, who is more concerned about controlling performance achievement in the short term than about building a stable relationship with the communication partner (Durkin and Lawlor, 2001; Forrester Report, 2010). Moreover, the client is sometimes unable to correctly judge the value of the consulting service provided by the agency due to limited experience. This often happens because of the *junioritisation* process (Diaz-Mendez and Saren, 2019) following the entrance of young managers with high digital skills but inadequate managerial experience (Vernuccio and Ceccotti, 2015). This can trigger a "vicious circle of value depletion" (Diaz-Mendez and Saren, 2019), which leads the agency to become just a supplier instead of a partner (Mortimer and Laurie, 2019).

2.2 Purpose of the study

Although the academic literature has started to analyse the evolution of agency-client relationships in the communication network, in our opinion, some important aspects remain to be examined in depth, in response to recent calls for research (Keegan *et al.*, 2017). First, to date, no systematic, in-depth and transversal analysis has been conducted with respect to all the main communication partners (i.e., advertising agency, media centre, PR agency, digital agency). Indeed, previous studies have focused mainly on traditional players, i.e., advertising and PR agencies (e.g., Kitchen and Schultz, 1998; Valentini, 2015), while paying less attention to other categories, in particular, media centres and digital agencies.

Moreover, given the importance of *country-specific* cultural aspects in orienting the evolution of relationships, it is useful to study this phenomenon empirically in countries other than those considered so far (UK and USA in particular), such as in European and Asian countries, as suggested by Keegan *et al.* (2017). In the absence of studies conducted in Italy, it is important to investigate the evolution of the agency-client relationship in our country. Italy has some unique characteristics in terms of marketing communication, such as a media mix that still leans towards television advertising and marketing communication digitisation that has not reached full maturity yet (IAB Europe, 2018). Moreover, the impact of the economic-financial crisis on communication spending in Italy has been greater than that in other European countries (MarketLine, 2019), showing a strong correlation with GDP. Though the impact of the crisis on communication spending and media mix has been discussed in previous studies (Picard, 2001; Collesei and Checchinato, 2010), what seems to be missing is the analysis of its effects on the agency-client relationship.

In this context, our research aims to develop two *interpretative frameworks* relating to changes in the communication scenario and consequent effects on the agency-client relational dynamics in Italy by empirically analysing the perspective of Italian communication professionals in a transversal way with respect to the different categories of players.

Therefore, we formulate the following research questions:

RQ1 - What are the *emerging issues,* understood as the key aspects characterising the change in the marketing communication scenario, that have consequences on the evolution of the agency-client relationship?

RQ2 - What are the main (direct and indirect) *consequences* that the emerging issues of the new scenario have on the evolution of the agency-client relationship?

The adopted perspective is that of the communication partners, i.e., those more or less specialised structures that support advertisers in various ways in the ideation, planning, implementation, diffusion and measurement of brand communication. The key players that meet the "demand" for communication services of the advertiser company (Vollero, 2008) include advertising and public relations agencies, media centres and digital agencies.

Unlike previous research (Laurie and Mortimer, 2019; Mortimer and Laurie, 2019), this study goes beyond the agency's homogeneous view in order to consider the specificities of the various categories of communication partners. As a result, we formulate the last research question:

RQ3 - Are there any *differences in the agency-client relational dynamics* based on the specific category of agency?

3. Methodology

To deepen the evolution of agency-client relationships from the perspective of communication professionals, a qualitative exploratory approach based on in-depth personal interviews was adopted (Creswell, 1998). This choice is also linked to the nature of the object of investigation, which is not suitable for quantitative measurement because it presents blurred and constantly changing outlines (Molteni and Troilo, 2003). A total of 53 professionals in top positions belonging to three macro-groups were interviewed:

- *Traditional agencies* (n=26), i.e., advertising agencies (n=6), integrated agencies[1] (n=7), media centres (n=4), public relations agencies (n=6) and advertising sales agencies[2] (n=3);
- *Digital agencies* (n=10);
- *"Highest points of view"* (n=17), i.e., trade associations of agencies and advertisers (n=9), large advertisers (n=6) and international networks (n=2). In this case, the objective was to have a more transversal vision of the causes and effects inherent in relational dynamics for the various types of players, thanks to their privileged perspective as observers (trade associations), advanced users (*"big spender"* advertisers) and coordinators (international networks) of the different agencies, both traditional and digital.

For the choice of professionals, the *key informant approach* was adopted (Robson and Foster, 1989), thus inserting only expert profiles in the "theoretical sample" (Dexter, 1970). Only subjects with a leading role within the agency (e.g., CEO, President), advertiser (e.g., Marketing Director, Head of Global Advertising) and trade association (e.g., President, Head of the Study Centre) were contacted. Potential interviewees (n=200) were sent an email inviting them to participate in the study with a summary of the research project[3]. On average, the respondents have 23 years of professional experience in the field of communication, have worked in four different organisations throughout their careers and are 78% male (see Appendix - Study informants).

The interviews were conducted by telephone or at the interviewee's office, and lasted between forty and sixty minutes. The data were recorded, transcribed in full and analysed with qualitative content analysis (Langdrige, 2004; Braun and Clarke, 2006). For the elaboration of the interpretative frameworks, the cognitive mapping technique was used (Chaney, 2010), which allows us to highlight the concepts underlying the respondent's mental representation of the phenomena, as well as the relationships between these concepts. In particular, the phases of the *"documentary coding method"* (Wrightson, 1976) were followed: codification of the text, preparation of the "dictionary" (list of all the concepts used by the interviewees and their related *verbatim*), as well as the *"relationship card"* (to identify the relations between the concepts), and the design of the collective cognitive maps (Swan, 1997). These are holistic models resulting from the systematisation of the positions that transversally emerged from the analysis of the interviews.

With regard to the analysis of the maps, in line with the exploratory and qualitative approach of the study, it was decided not to resort to the structural analysis of the maps but rather to their qualitative reading (Chaney, 2010). A qualitative analysis of the meaning of the nodes

[1] The integrated agency offers consultancy about several marketing communication mix tools (e.g., advertising, PR, direct marketing, digital marketing) (Ceccotti, 2018).

[2] The interviews with the professionals belonging to the advertising sales agencies were aimed at acquiring a more complete picture of the relationship involving media centres and advertising agencies.

[3] The response rate (26.5%) is in line with that found in studies with similar respondents (Waldman *et al.*, 2006; Conte *et al.*, 2017).

(concepts) and of the causal links between them (RQ1, RQ2) was therefore conducted. Finally, the analysis of the content has also allowed the deepening of the specificities of the different partners (RQ3).

4. Results

Based on the qualitative content analysis and the application of the *"documentary coding method"*, two interpretative frameworks were developed: the first represents the emerging issues of the new communication scenario (RQ1), while the second outlines the consequences of these issues on the agency-client relationship (RQ2). The first framework (fig. 1) was developed to transversally analyse the variety of meanings associated with the new scenario for the different players by outlining the main sub-themes (category links) for each macro-theme. The elaboration of the second framework (fig. 2) was guided by the aim of highlighting the effects of these issues on the evolution of the agency-client relationship, outlining the main causal links. In the presentation of the results, the specificities of the relationship between the client and the different types of agencies will be highlighted (RQ3).

4.1 Emerging issues of the new communication scenario

On the basis of the communication scenario evolution in Italy, there are two phenomena that are transversally perceived by the respondents: the *digital revolution* at a global level - with the diffusion of the Internet, social media and mobile devices - and the *economic-financial crisis* (fig. 1).

The combination of the digital revolution and the economic-financial crisis has led to six issues (macro-themes) that characterise the new scenario of marketing communication and are at the basis of the evolution of the agency-client relationship in our country (fig. 1): *a) complexity; b) liquidity; c) speed; d) measurability; e) client evolution; and f) budget reduction.*

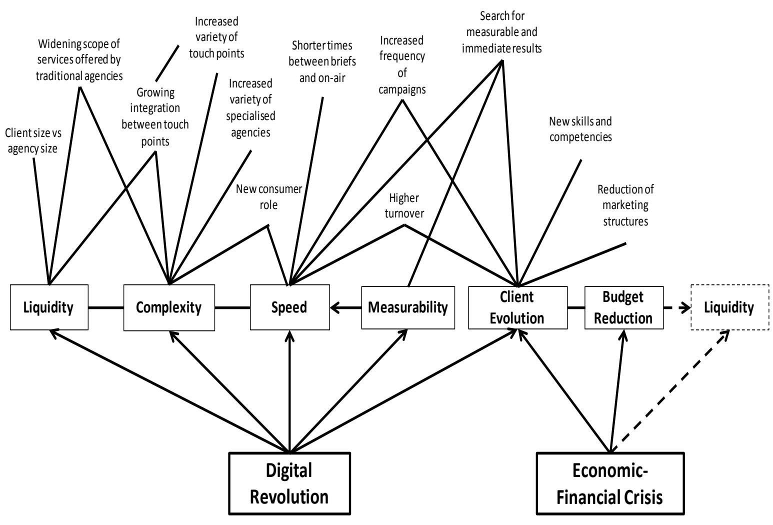
These macro-themes have been broken down into sub-themes by using category links (fig. 1).

a) *Complexity* is a central issue for the interviewees, who describe the new scenario and the new communication practices as "more complex" than in the past. This theme, which is seen as a direct and exclusive effect of the digital revolution, refers to two main areas: (1) an *increased variety of touch points and specialised agencies* and (2) *the new role of the consumer*. Touch points are increasing in terms of variety and, as we shall see in relation to liquidity, they continue to be less separated from each other and used in omni-channel and integrated logic. The second meaning of complexity, which is especially highlighted by digital and PR agencies, lies in the change in the role of the consumer, who has become the protagonist, *always-on* and multi-channel, seeking a more direct, transparent and "democratic" relationship with brands.

b) *Liquidity* is generated jointly by the digital revolution and the economic-financial crisis and is a dimension of complexity. The meaning of this term is not that of the economic and managerial disciplines, but rather more similar to the sociological field (Bauman, 2000). In this case, liquidity is linked to the progressive blurring of well-defined boundaries of "objects and subjects" (Mattiacci, 2014) that operate in the world of communication. In the perception of the interviewees, this theme also presents the following different meanings:

1. The progressive disappearance of the separation between marketing communication tools and media in the logic of a growing integration of touch points;
2. The widening of the scope of services offered by traditional agencies. For example, the advertising agency also combines consulting services in the field of public relations, and the media centre also provides data-driven creativity. This phenomenon can be attributed not only to the digital revolution, but also to the crisis that has forced agencies to look for new business opportunities;
3. The disappearance of the traditional affinity between client and agency size. With regard to the supply of services, large agencies (especially advertising agencies) are also starting to pay attention to smaller clients: even if they are not strategic for the growth of the agency, they at least allow the firm to cover fixed costs in times of crisis. As regards the demand side, there is a growing use of the services provided by small- and medium-sized agencies (especially digital agencies) by large advertisers. Until a few years ago, this choice was linked to the client's willingness to experiment with new areas of communication starting from a low budget, but today it is mainly due to the search for a highly specialised service, which is provided by more streamlined and flexible structures, that can guarantee the client a higher level of caring.

Fig. 1: Emerging issues of the new communication scenario (RQ1)



Source: our elaboration.

c) *Speed* is the second dimension of complexity (in addition to liquidity) and relates to the variability of phenomena over time. According to the interviewees, this issue is one of the main consequences of the digital revolution. Speed can be traced back to three fundamental perspectives that concern (1) the consumer, (2) the advertisers, and (3) the agencies. (1) In the case of the consumer, speed refers to the immediacy of reaction to the different communication stimuli, the rapidity in the consumption of the messages, and the exhaustion of attention and interest on the part of distracted individuals who are always in search of new stimuli. (2) With reference to the advertisers, speed refers to the search for immediate results by the managers. This is not only an effect of the digital revolution (which allows accurate and rapid measurements of behavioural communication results), but also of the economic-financial crisis (which has shortened the time in which such returns must be obtained). The increased frequency in the request for communication campaigns by advertisers is linked to the speed of consumption of messages by the consumer and the need to have immediate results by the client. (3) Regarding agencies, speed is associated with the reduction of the time that elapses between the client's *brief* and the campaign's *on-air* exit. This reduction in time is the result of more streamlined decision-making processes, also due to the rapid consumer reactions that require timely responses from the agency, in agreement with the advertiser. In addition to shorter decision-making times, there is a progressive reduction in the time taken to produce messages, which are often reviewed to follow the consumer throughout the different phases of the *customer journey.* Finally, digital media purchase times are shorter: because of automation, they can be planned and purchased in *real time (programmatic buying)*.
d) The fourth issue of the new scenario is *measurability*, which derives directly from the digital revolution. The causal relationship between measurability and speed is clear: the latter is made possible thanks to the use of data, which makes decisions and purchasing processes faster and, by this means, the optimisation of digital campaigns in real time. Not only *ex ante* but also *ex post* data availability has completely changed the communication mindset, formerly based on "estimation" and now on the objective measurement of behavioural results.
"*The digital revolution has instilled the concept of measurement in the advertiser's mindset. Before there was no such concept... communication was based on estimation, while with the advent of digital [tools] you can measure everything, both before and after. Communication today is more informed because it calls for the use of data in both pre and post. Today, we have the ability to analyse and track consumer behaviour that was previously unthinkable*" (CEO, Media centre).
e) The combined effect of the economic crisis and the digital revolution has an impact on *client evolution*. The crisis has led to tension towards measurable and immediate results and the reduction of marketing structures due to the exit of many professionals from client companies. Alongside this quantitative reduction, several respondents also highlighted the qualitative change in client structures resulting from the

digital revolution, with the acquisition of new skills and competences to manage the more technical aspects of digital communication. Therefore, younger professionals were hired, with a higher turnover than experienced with more "traditional" professionals. However, this higher turnover is also widespread for managers who were not involved in digital activities and who, especially in large multinational companies, are assessed based on their ability to achieve the objectives that are set in the short-medium term.

f) Finally, *budget reduction.* Although it represents one of the aspects of client evolution resulting from the crisis, in our analysis, its consequences on the evolution of agency-client relationship is important enough to set it apart.

4.2 Consequent effects on the evolution of the agency-client relationship

The new scenario outlined above has several effects on the evolution of the agency-client relationship. In particular, the main relational consequences that emerged from the analysis are as follows (fig. 2): *a) client disorientation; b) increased intensity of the relationship; c) more objectivity in the evaluation of the service provided by the agency; d) greater stability of the relationship (virtuous path); e) greater volatility of the relationship (vicious path); f) changes to the managerial level and experience of the marketing counterparts (client).*

a) *Client disorientation.* Faced with the fragmentation of the marketing communication network (complexity) and the dilution of the boundaries between the different players (liquidity), there is a risk of disorientation (confusion) on the part of the client, who may not be able to effectively select the "right" agency within the new scenario. Some of the interviewees from the traditional agencies believe that this disorientation is gradually disappearing and that clients are becoming more aware of the specific contribution they should expect from different types of agencies.
"Until recently, we were invited to agency pitch presentations where I wondered 'why did this invitation come to us?'… We were competing with an agency that had absolutely nothing to do with us. Digital revolution created a lot of confusion for the client. Today, the situation is slowly changing" (Managing Director, PR Agency).
However, respondents working in digital agencies point out that it is still difficult for advertisers to properly assess their contribution especially in the case of branding initiatives: clients expect to obtain results in this area as quickly as they are used to obtaining results from more performance-oriented digital initiatives.

b) *Increased intensity of the relationship*. This effect derives from the issue of speed and, in particular, from the meaning that is more closely linked to the current *modus operandi* of both agencies (that adopt rapid processes to respond to the speed of the consumer) and clients (that require increasingly frequent campaigns). Such higher intensity is to be understood in terms of opportunities for exchanging information and communication between the parties, who interact more frequently than in the past, when relational dynamics were marked by few milestones: the brief, the presentation of creative proposals and media planning (in the case of a full-service agency) and the final approval. The relational intensity also increases when the agency tries to start a virtuous path by presenting itself to the client as a strategic business consultant (not only as a communication consultant).

"We are increasingly becoming consultants to our clients...this translates into a relationship that is continuous, which requires many hours a day and many days in our client's offices…this is the only key to doing business today" (CEO, Digital agency).

c) *More objectivity in the evaluation of the service provided by the agency.* According to some respondents, there is a greater objectivity in assessing the service provided by the agency, thanks to the greater measurability of the communication results. This applies not only to the contribution made by digital agencies but also to traditional agencies, which are increasingly committed to delivering measurable results to their clients. Therefore, it seems to have reduced the importance that is given to the personal and subjective aspects that often guided the choice of the agency and the evaluation of its work by the client in the past.

d) *Greater stability of the relationship (virtuous path).* Faced with a scenario that is becoming increasingly complex, the fundamental role of agencies in simplifying such complexity and providing a high level of consulting services to client companies emerges.

"The more 'complicated' the marketing communication is, the more the client needs consultants who can help him to simplify the complexity. On our side, we have to develop in-depth analysis and understand what works, how and when" (CEO, Media centre).

In terms of demand for communication services, the reduction of the client's marketing structures increases the propensity to delegate efforts to outside consultants who can better guide the communication strategy, safeguarding message consistency by means of various tools and media and, consequently, the value of the brand for each target.

"Clients are looking for a single point of contact because they want to give the agency an advisory role for activities that they once carried out internally" (President, Trade Association).

In relation to this need, the agencies have taken different paths, one virtuous and the other vicious.

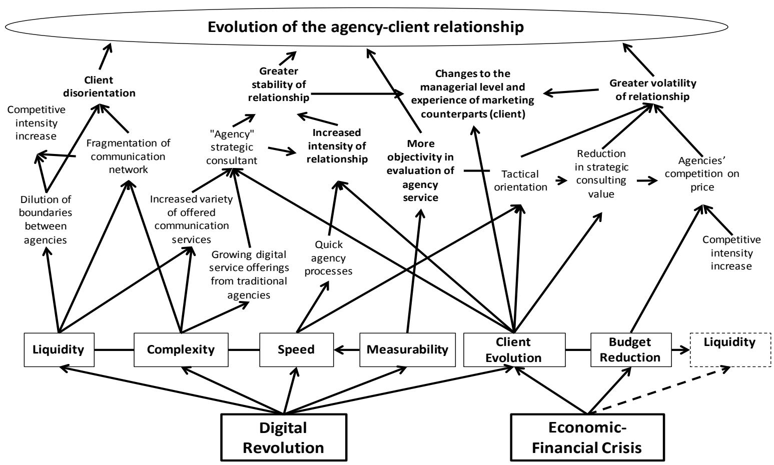
The agencies that have grown in recent years are those that have been able to offer significant contribution to their clients as strategic communication partners and business consultants. This path is primarily taken by the media centres, which are perceived by the clients as strategic partners, for various reasons: (1) proactivity to adopt changes triggered by the digital revolution by reducing the complexity of the new scenario for the client; (2) expertise with data to manage communication campaigns in a more effective and efficient way; and (3) financial stability, which allows them to acquire the best talents in the job market.

Moreover, in Italy media centres are assuming a central role in the communication network, both as a full-service agency (through the acquisition of skills in *data-driven* creativity) and as an integrated agency. Therefore, this player is assuming the role of coordinator in the specialised network that was mainly played by the client or advertising agencies in the past.

Finally, PR agencies are trying to play an increasingly strategic role: these players have faced the change faster than advertising agencies by acquiring expertise in dialogue and brand content storytelling. Having strong experience in content management, these agencies position themselves as strategic consultants in the construction and maintenance of brand equity and brand reputation. However, this process is still in progress and has very uncertain outcomes.

As regards the new players, this virtuous path also characterises those agencies that position themselves as strategic digital consultants (e.g., *digital enablers* and *system integrators*) by accompanying clients in the overall digital transition.

Fig. 2: Evolution of the agency-client relationship (RQ2)



Source: our elaboration.

e) *Greater volatility of the relationship (vicious path).* This effect is the opposite of the previous one and starts from the fragmentation of the communication network and the consequent increase in the competitive intensity among agencies. This is due to (1) liquidity related to the blurred borders between the players and the lack of the traditional affinity between client and agency size, and (2) complexity, in terms of the growing variety of specialised players. Hence, the client is experimenting with new alternatives, especially when these require smaller investments. As a result, there is greater difficulty in establishing long-term partnership between agencies and clients and, therefore, an increase in the volatility of their relationship. Moreover, the increase in competitive intensity in a slow-growing market, such as that of marketing communication in Italy, shifts the *focus* of competition among agencies to price.

The increased price competition also depends on the reduction in the perceived value of the consulting services that are provided by some agencies. Indeed, if the agency does not make the leap towards an integrated value proposition and support the client's strategy, the risk of seeing the agency contribution "diminished" becomes high. Moreover, the client is often moved by a tactical orientation, which is based on the search for immediate results. Therefore, the client is not led to correctly acknowledge and pay the value of the strategic consulting service that the partner offers. In such cases, the agency is perceived as a highly fungible supplier: the main criterion for choosing a communication consultant is an economic one, and the client, in the constant search for efficiency, will prefer the agency that offers the requested service at the lowest price.

As mentioned above, this vicious path particularly involves advertising agencies and, to a lesser extent, PR agencies.

"Advertising agencies have not been able to make a qualitative leap forward; they have not been able to maintain their role as consultants alongside the clients, the owners of the brand's know-how. They have allowed themselves to be marginalised and, as a result, instead of maintaining the role of conductor over all the other musicians, they have set themselves at the same level of the others…which is why today's advertising agencies are in competition with everyone to regain this role" (CEO, Integrated agency).

Agencies attribute the responsibility for this vicious circle to clients who, according to some respondents, underestimate the effects of continuous change: although there are no apparent high costs in changing communication partners, there is a risk of weakening brand positioning and losing brand equity in the medium-long term.

f) *Changes to the managerial level and expertise of the marketing counterparts (client)*. The matter of the managerial level of the marketing counterparts (i.e., managers who relate to the agency within the client company) is linked to the type of path (virtuous vs. vicious) of agency-client relationship dynamics. As we have seen, when the agency offers strategic consulting services, it manages to avoid price competition and obtain a more mature and lasting relationship. In this way, the strategic partner manages to have a counterpart in the client company at a higher managerial level. This is especially the case for media centres and digital consulting agencies (that support the client in digital transformation). On the other hand, when agencies undertake the vicious path of relational volatility, there is a reduction at a managerial level of their marketing counterparts. This is most frequently the case for advertising and PR agencies.

An important aspect related to the client concerns the introduction of new digital skills, with a consequent managerial renewal. According to some respondents of traditional agencies, this change may represent a potential relational risk when the specialist (digital) skills of managers are not supported by adequate managerial experience. If this case, critical relational issues could arise, especially when there is a substantial difference in age and "experience" between the youngest resources (on the client's side) and the most mature ones (on the communication partner's side).

5. Conclusion

5.1 Academic contribution

This study is part of the recent academic literature on the evolution of the agency-client relationship and proposes a systematic analysis of the perspectives of Italian communication professionals on the innovative issues that characterise the marketing communication scenario and consequent effects on agency-client relational dynamics in Italy.

The geographical focus is the first original aspect of the study, which aims to investigate specificities in the evolution of agency-client relationships in a context that had not been studied in-depth yet while presenting unique aspects of marketing communication (§1 and § 2.2).

A second academic contribution concerns the breadth of the adopted perspective, which unlike previous studies (Kitchen and Schultz, 1998; Durkin and Lawlor, 2001; Kitchen *et al.*, 2004), considered the standpoints of different types of agencies, and went even deeper by examining under-researched players (i.e., media centres and digital agencies). The emerging issues of the new communication scenario and consequent relational effects that result from the analysis were represented through two *conceptual frameworks*. The latter contribute to the literature by offering a "transversal" understanding of all players' perspectives with reference to the main concepts (nodes), the meanings associated with these, and the links that exist among them. Therefore, we proposed an advancement of the literature that has investigated these phenomena "monadically" and not in a holistic way (e.g., Diaz-Mendez ad Saren, 2019; Laurie and Mortimer, 2019; Mortimer and Laurie, 2019).

Moreover, in view of the increasing variety of communication partners (Ceccotti, 2018) and in response to recent calls for research on relational issues (Keegan *et al.*, 2017), this study proposed the first "vertical" reading of agency-client relational dynamics by focusing on the point of view of different categories of agency in terms of heritage and value proposition.

Our analysis identified six fundamental issues of discontinuity that define the new scenario of marketing communication in Italy (§ 4.1): *complexity, liquidity, speed, measurability, client evolution and budget reduction*. These derive from two important phenomena, the digital revolution and the economic-financial crisis. As far as the effects of digitisation on complexity and measurability are concerned, our results are substantially in line with previous studies (§ 2.1), while they present traits of originality regarding other issues - such as liquidity and speed - which have been analysed with respect to agencies, clients and consumers for the first time. In addition, the economic-financial crisis represents a *country-*

specific factor in Italy, taking on considerable relevance in the perception of respondents in determining both the liquidity of the new scenario and client evolution. While previous studies have described the effects of the crisis only on the overall level of investments in marketing communications and on the media mix (e.g., Picard, 2001; Collesei and Checchinato, 2010), our research adopted a broader perspective: in addition to the effects of the crisis on budget reduction, here we also considered those relating to client evolution and scenario liquidity, which are the basis of the evolution of the agency-client relationship.

Regarding the main consequences of emerging issues on the agency-client relationship in Italy, six relational effects have been identified (§ 4.2): *client disorientation, increased intensity of relationships, more objectivity in the evaluation of the service provided by the agency, greater stability of relationships (virtuous path), greater volatility of relationships (vicious path), and changes to the managerial level and experience of marketing counterparts (client).*

These results underline interesting aspects related to the client and the various categories of agencies in Italy. First, client disorientation is a phenomenon that emerges in our country, and is not found in other studies that investigate more digitally advanced countries (§ 1 e § 2.2).

The increased intensity of relationships and objectivity in the evaluation of the service involve Italian advertising and PR agencies in particular, while digital agencies benefit from these new requests from clients.

The results seem to be in line with previous studies (§ 2.1) concerning the increased centrality of the media centre in its role as a network coordinator (Grant and McLeod, 2007 in Scotland). However, for the first time, we have demonstrated this trend for some digital agencies.

Moreover, our results outline the emergence of the phenomenon of a "vicious circle of value depletion" that had been found in recent studies on agency-client relational dynamics (Diaz-Mendes and Saren, 2019): this phenomenon seems to be more frequent for Italian advertising and PR agencies.

5.2 Managerial implications

Our results highlight some specific issues for the various categories of agencies, thus providing useful managerial implications for each player.

Currently, the media centre is conquering an important role as a strategic consultant and main partner of the client in integrated communication campaigns, having acquired relevant skills in data-driven creativity. Due to this new role, the media centre can count on very high-level marketing counterparts and on a greater stability of relations, having transformed the collaboration with clients into real long-term partnerships. In light of our results, this player has yet to face some challenges: (i) the development of creative skills, offering a "favourable" workplace both for data scientists and creatives and (ii) the extension of the scope of offered services in an increasingly integrated way. This could require a process of business model innovation, in order to offer a value proposition that is truly integrated, consumer-centric and omni-channel.

The digital agency is also becoming increasingly important from a relational point of view. The results show how the relational intensity and, almost as importantly, the possibility of evaluating this player on the basis of more objective criteria than those used for traditional agencies have led to an improvement in the role of consultants for this category of agency. However, in view of the still current disorientation of the client regarding the contribution made by digital agencies, it is important for them to play an important formative role not only in proposing communication initiatives but also in developing the client's digital culture. Only by doing so could this player acquire the role of strategic partner and therefore take the "virtuous" path, counting on the greater stability of their relationship with the client.

The findings highlight the loss of the advertising agency's strategic role in Italy due to the reduction of the value that the advertiser attributes to its consulting service. For this reason, the advertising agency is often considered as a fungible provider and not as a partner with whom to maintain long-term relationships. Hence, we observe the increasing relational volatility and the connected deskilling of the marketing counterparts in the client. Consequently, it is necessary for this player to regain a strategic role by proposing itself as a business consultant and taking on a training role for the client in view of such a complex scenario. PR agencies must also move in the same direction. Although PR agencies seem to have started the digital transition earlier than advertising agencies, they are having trouble in conveying the real value of their consulting service. In light of these results, advertising and PR agencies must deeply rethink their business model by initiating or continuing an important process of digital transformation. First, they have to organise the agency (i.e., people and structure) in a way that could respect the *speed* of the new scenario and the imperative of efficiency due to client budget reduction (e.g., process automation, acquisition of new resources and digital skills). Moreover, advertising and PR agencies have to design a value proposition that is more integrated and more performance-oriented to better deal with competition from media centres and digital agencies.

Finally, the interviews demonstrated that there is still a condition of client disorientation regarding the greater variety of offered communication services. This critical situation is destined to diminish over time following the maturation of the effects of the digital revolution. However, it must necessarily be a joint effort between the client - in the acquisition of the necessary skills for a better choice and evaluation of the partner - and traditional and new agencies - in their presentation of a clearer and more distinctive value proposition.

5.3 Limitations and further research

This study presents all the limitations of qualitative research, which prevents any generalisation of the results. Moreover, the perspective that was selected for this study was that of the communication partners and not the client. Accordingly, all the considerations concerning the advertisers are mainly the result of the perception of the professionals who support clients in marketing communication campaigns. In our opinion, this is a first aspect worthy of further investigation.

In addition, it could be interesting to involve other players in the research, such as digital and social network platforms (e.g., Google, Facebook, etc.). In fact, it seems appropriate to further investigate the different configurations of the network and the relational dynamics that are triggered as a consequence, in terms of collaboration and competition, among advertising agencies, digital agencies and digital platforms. It could also be interesting to explore the process of business model innovation that traditional players - above all advertising and PR agencies - have to enact to regain their strategic role in the communication network.

Moreover, the digital agency-client relationship deserves to be investigated to understand whether the life cycle of the relationship and critical relational issues present some differences with respect to traditional players.

Finally, a comparative analysis of the agency-client relationship evolution in other European countries that have not been analysed yet, such as Spain and France, could be useful to better understand similarities and differences among the main advertising markets in Europe.

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Appendix - Study informants (n=53)

Macro-group	*Category*	*Organisation*	*Participant job title*
"Highest points of view" (n=17)	Trade association of agencies and advertisers (n=9)	ADCI	President
		Assocom	President
		Assocom	Managing Director
		Assorel	Managing Director
		HUB PR	President
		IAB	Marketing Director
		UNICOM	President
		Centromarca	Communication and external relations Director
		UPA	Head of Studies Office
	International network (n=2)	Publicis Communications	Communication and external relations Director
		WPP Italy	External relations Director
	Advertiser (n=6)	BNL	Retail communication Manager
		Enel	Head of global advertising
		Ferrovie dello Stato	Head of branding and communication
		Findus	Marketing Director Southern Europe
		Garofalo	Global marketing Director
		L'Oreal	Digital and communication Director Cosmetique Active
Traditional agencies (n=26)	Advertising agency (n=6)	J. Walter Thompson	Head of digital
		Leo Burnett	Managing Director
		Ogilvy & Mather Italia	CEO
		Ogilvy & Mather Italia	Creative Director
		Agenzia Alfa*	Managing Director
		Y&R Italia	Managing Director (Rome)
	Integrated agency (n=7)	Acqua Group	CEO
		Acqua Group	President
		Enfants terribles	Business Development Manager
		Gruppo Roncaglia	General manager
		Gruppo Roncaglia	Strategic planner
		Red Cell	CEO and Head of strategy
		Zero starting ideas	CEO
	Media centre (n=4)	Havas media group	CEO
		IPG Mediabrands	Marketing Director
		Mec Italy	CEO
		Omnicom Media Group Italia	CEO
	PR agency (n=6)	Comin & Partners	Founder
		Edelman Italia	Senior vice president marketing and creative director
		Istituto Nazionale per la Comunicazione	Project manager
		SEC RP	CEO
		Soluzione Group	Founder
		Weber Shandwick italia	Managing Director
	Advertising sales agency (n=3)	Hearst	Digital Director
		Rai Pubblicità	Research and communication Director
		Concessionaria Beta*	Marketing Director- Head of Digital
Digital agencies (n=10)	Digital agency (n=10)	Alkemy	VP Communication
		77 agency	Managing Director (Rome)
		AKQA	VP Sales and marketing Italy
		BizUp-Upstory	CEO
		Connexia	CEO
		Digital agency Gamma*	Head of strategy
		Doing	Partner
		Seolab	CEO
		We are social	Managing Director
		Webranking	President

* Respondent asked the authors not to give the name of the organisation he/she belonged to (fictitious name).

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