

# I. SENSE OF BELONGING



## Identity

Consciousness has to be herself and different from the others. It is the manifestation of being consistent.



Identity/ Who am I?





Image/ Set of traits that characterize an institution to society, interpretation of personality.





Image/ What I look like.





Perception/ **Harmony**  
between what we are and  
what the stakeholders  
perceive us.





Who are we? / Representatives of the marketing communications industry. Composed of various associations and these in turn by different companies.







Where are we going? / Promote and encourage the development of the industry of marketing and corporate communications.





## Our Principles/

**LEGALITY.** Adherence to legal norms.

**BUSINESS ETHICS & HONESTY.** Communications with integrity and respect for customers and consumers to contribute to business development.

**COMMUNICATION WITH VALUES.** Cohesion and healthy development of society as a whole.

**RESPECT & HEALTHY COMPETITION.** Professionalism to win public confidence.

**QUALITY & INNOVATION.** Advice based on the continuous updating of their business practices and process innovation.



## II. VALUE OF INVESTMENT SERVICES MARKET FOR 2012



## RELEVANT INDUSTRY DATA 2012

The value of the industry is estimated at 153.2 billion pesos for the year 2012. Ad spending for 2011, representing an increase over the previous year, 10.2%.

The industry provides jobs for little more than 1.6 million people. These disciplines presented the most outstanding growth over the previous year, which explain the behavior of the industry in 2012:

26.1%	Public Relations
18.5%	Graphic Design
13.0%	Promotions

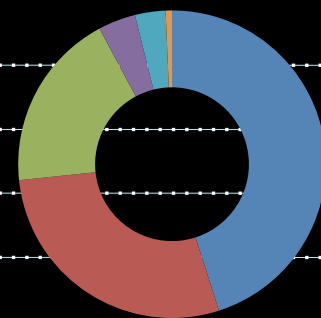


# DISTRIBUTION INVESTMENT SERVICES MARKET BY DISCIPLINE

\$153,171 mdp\*



Investment (MDP)	Percentage
69,021	45%
43,312	27%
28,880	19%
6,018	4%
4,926	4%
1,014	1%





## ADVERTISING

The advertising spend grew by 7.9% over 2011. Ranking in the amount of \$ 69.021 million for 2012.

The growth of mass media advertising should transmission mainly spot campaigns conducted in different states and the recovery of domestic demand.

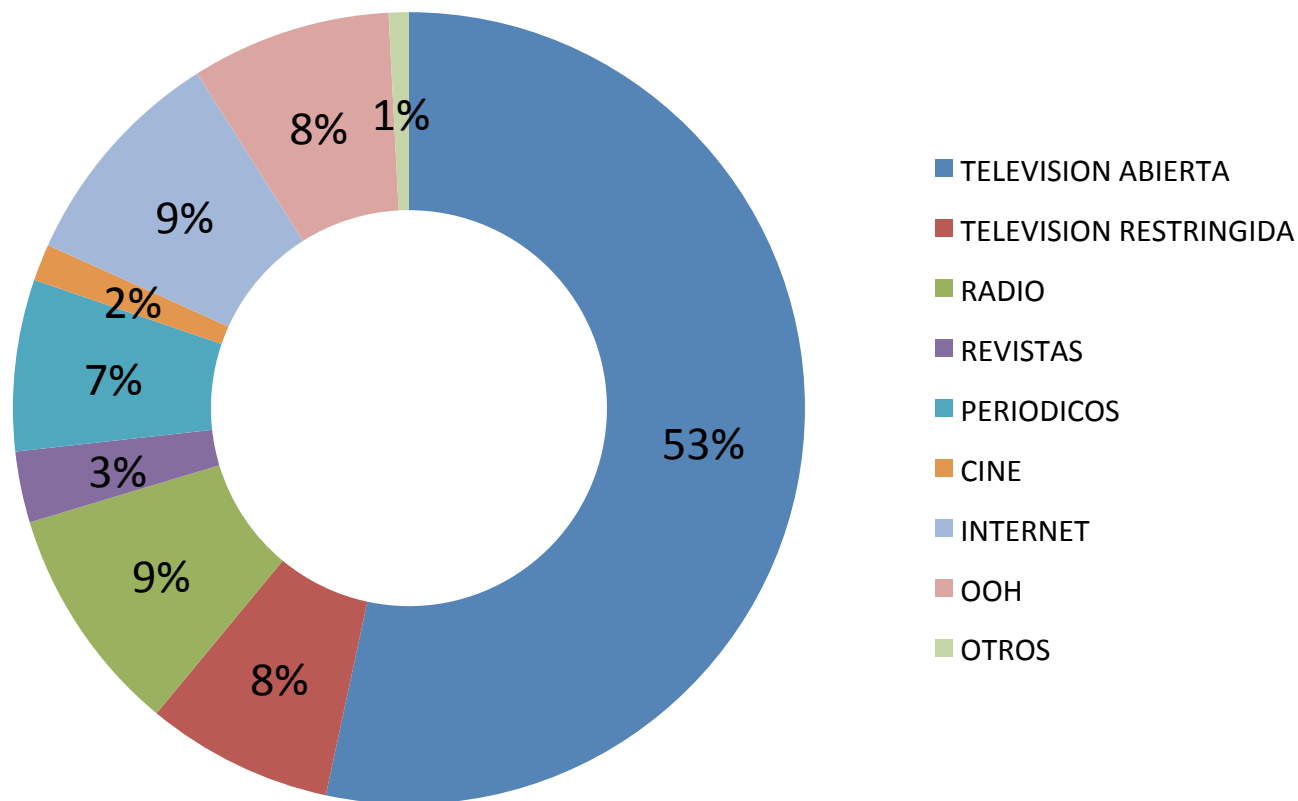
The media had a significant growth in 2012, were the Internet, advertising on pay TV and Radio, with 38%, 24% and 15% growth in pesos, respectively.

The Television Broadcasting represents 53.0% of total investment in media, followed by investment in advertising and Internet Radio with 9%.

# ADVERTISING

## DISTRIBUTION INVESTMENT ADVERTISING BY

\$69,021 mdp\*  
(\$13,500mdd)



Source: AAM / TV Financial Reports.

Notes: Other cosponsors include productions and related promotions.

OOH: Out of Home.

\*Millones de Pesos



# DISTRIBUTION INVESTMENT ADVERTISING BY

\$69,021 mdp\*



Investment (MDP)	Percentage
36,834	53%
5,266	8%
6,451	9%
2,066	3%
1,039	2%
4,831	7%
6,397	9%
5,629	8%
568	1%



# PROMOTIONS

The ideas presented in the last year, a significant growth and is at 12.4%.

Of the total investment of \$ 43.312 million, 65% was generated by actions Promotoría and Demonstrator Point of Sale.

The remaining 35% is made up various activities Below the Line performing Promotional Marketing agencies.

Promotions Agencies have the largest number direct jobs (886,000).



## DIRECT MARKETING

The Direct Marketing industry showed a growth 3% in 2012, compared to 2011.

Investment in Direct Marketing reached in the year of study the amount of \$ 28.880 million.

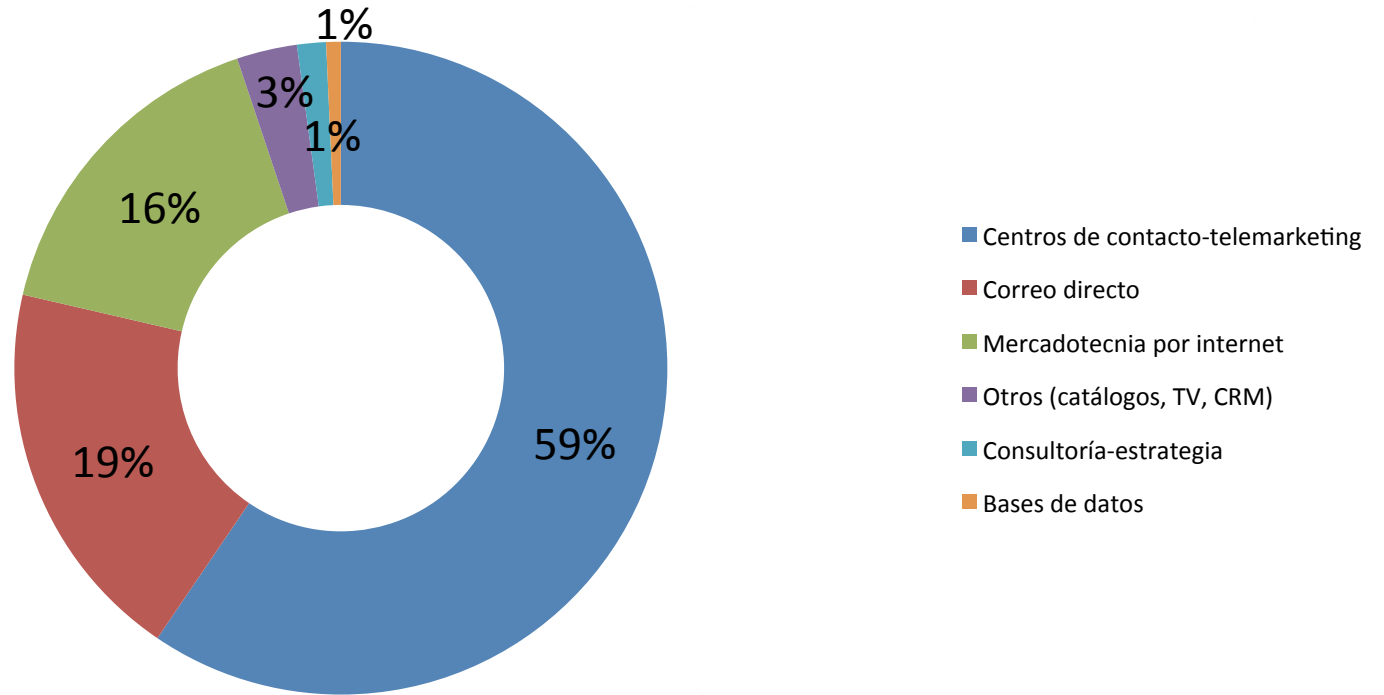
He presented a very significant increase, mainly due to increased activity of the contact center and internet marketing.

The Direct Marketing is the second activity with the highest number of employees, after discounts, as it has with just over 680,000 jobs.



## DISTRIBUTION INVESTMENT IN DIRECT MARKETING

\$28,880 mdp\*



# DISTRIBUTION INVESTMENT IN DIRECT MARKETING

\$28,880 mdp\*

	<b>Centros de Contacto</b>
	<b>Correo Directo</b>
	<b>Mercadotecnia por Internet</b>
	<b>Otros (Catálogos, TV, CRM)</b>
	<b>Consultoría - Estrategia</b>
	<b>Base de Datos</b>

Investment (MDP)	Percentage
17,111	59%
5,556	19%
4,718	16%
869	3%
396	1%
191	1%



## MARKET RESEARCH

The AMAI industry sector grew 4.1% Research in 2012. It's estimated value in Mexico for this year was \$ 6.018 million pesos.

Of the total revenues, 91% is done with customers in Mexico and 90% is obtained from private sector companies.

In 2012 about 10,094 projects were generated, of which 63% were quantitative.

Last year nearly 12,900 group sessions were conducted and about 22 200 in-depth interviews, and 6.6 million personal interviews in quantitative studies.

The industry employed last year to almost 9,900 people



## PUBLIC RELATIONS

The Public Relations industry in Mexico in 2012 had a value of sales of \$ 4.926 million pesos, representing a 26.0% increase compared to 2011.

The growth is due to increased turnover of the companies and a greater number of companies engaged in this activity.

The companies participating in the study (180), both agencies and companies claim that the activity of the PR cover 60% female and 40% male, with a total of 6,480 direct jobs.

The industry employed last year to almost 10,900 people



## GRAPHIC DESIGN

Investment obtained in this area in 2012 amounted to \$ 1.014 billion, generating this discipline, a growth of 18.4% over 2011.

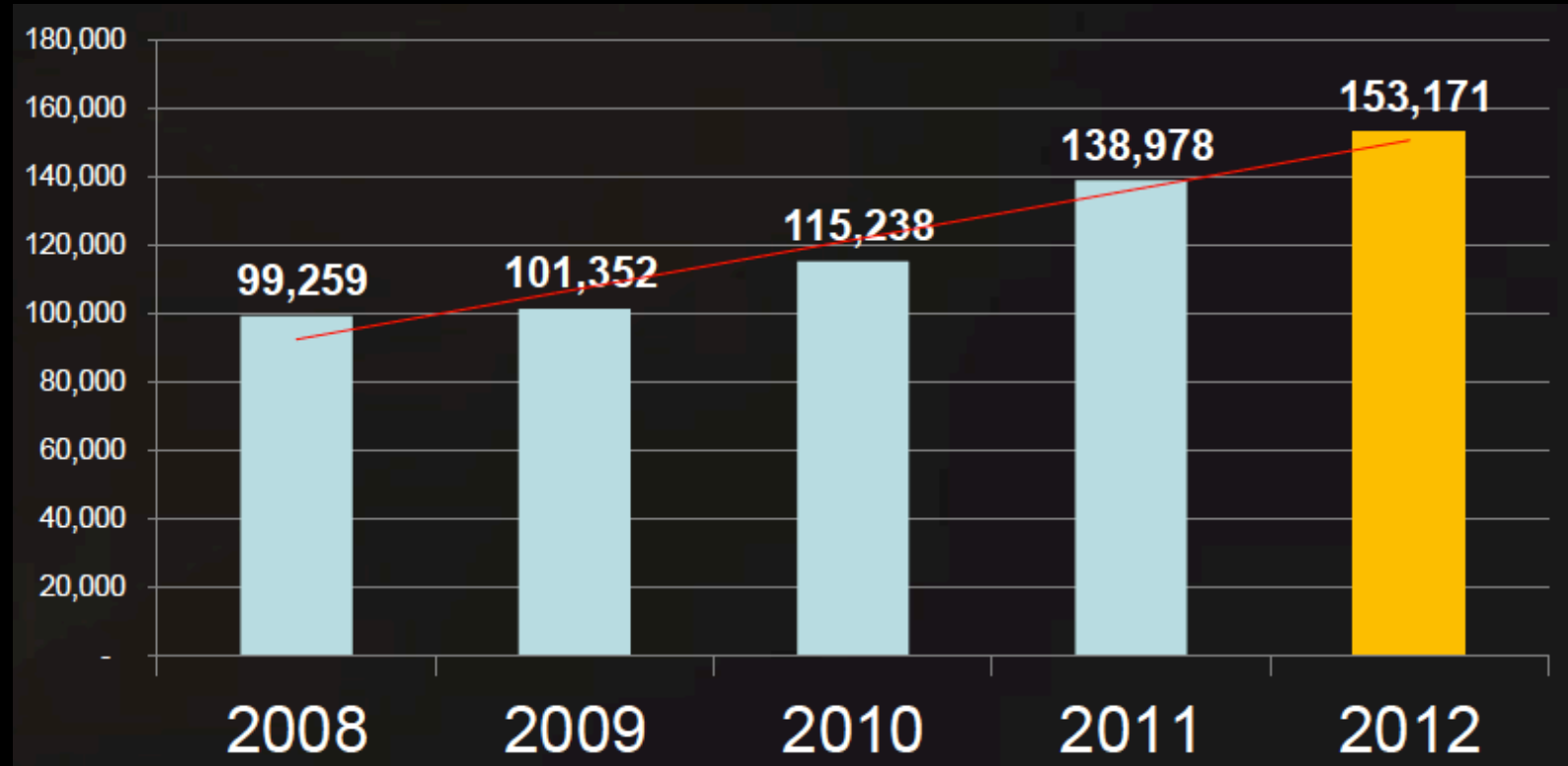
The industry employs just over 1,400 people directly.



### III. BEHAVIOR OF THE INDUSTRY IN THE LAST FIVE YEARS



## LAST FIVE YEARS INVESTMENT





# COMPARATIVE ANALYSIS LATAM 2012

Rack investment behavior of some media selected in the top three countries in Latin America.

Argentina maintains a significant dollar growth in ad spending in 2012, while Brazil and Mexico down its growth- with intentions to recover in 2013.

FLAG	MEXICO	BRAZIL	ARGENTINA
Investment services Market (mdd)	4,790	14,730	3,946
Growth investment 2012/2011	8.7%	8.2%	18.0%
Advertising investment per capita	42.1	76.4	94.3

Sources: Mexico CICOM with data associations.  
Projeto Inter-Media Brazil.  
Argentina Argentina Association of Advertising Agencies



## CONCLUSION

Union of all the actors involved in Marketing Communications makes our beef industry, grow and development and putting more profesional, and ethics. This has contributed to gain respect, powerfully authorities and society in general.

It has not been an easy process.

Now, with globalization, the challenge is to do it globally. Share best practices, be more ethical, more creative but also more human.



CICOM



Thank you!



Lorena Carreño  
VP CICOM México  
@LoreCarreno  
marketingq.com.mx  
+ 52 (55) 56152196