



CHINA AGENCY SCOPE

中国营销趋势研究

2018

A Research Study Conducted by R3 and
SCOPEN since 2006

该研究始于2006年，由胜三和SCOPEN联手开展

METHODOLOGY

方法论

UNIVERSE

研究概述

Our 2018 study comprises of managers and above levels, who are responsible for marketing, communications, advertising, digital and media in China. Their company must be currently working with at least one creative or media agency. The professional interviewed in each company had to be involved in the decision making process for selecting agencies and approving the work of their agencies. They had also to interact with creative-media agencies on an on-going basis. In addition to R3-SCOPEN's own databases, leading agencies in China were asked for a list of their most important clients, who collectively were approached by our interviewers.

2018年度调查的对象包括中国市场营销、传播、数字与媒体行业的高管。他们的公司当前必须与至少一家创意或媒介代理商合作，且每位受访的专业人士必须直接参与选择和核准代理商的决策过程，他们必须与营销传播或媒介代理商长期互动。除了胜三和SCOPEN的自有数据库之外，中国多家优秀代理商也提供了重要客户的名单，此次研究中涵盖了对于这些客户的访谈。

SAMPLE

研究样本

406 individuals working in 309 client companies with 746 client-agency (Creative, Marketing Services, Digital and Media) relationships analysed. In addition to individuals in marketing departments of client companies, we also interviewed the following professionals to complete the Study: Agency professionals (199 individuals), Trade Press Editors (14 individuals) and Procurement directors (32 individuals).

本次研究的样本来自309家客户公司的406名专业人士，746个客户/代理商关系（创意、线下/市场营销服务、数字营销和媒体）。为了完善调查，此次研究不仅采访了客户公司的市场营销人员，还采访了以下专业人士：代理商专业人士（199人）、行业刊物编辑（14人）和采购总监（32人）。

SAMPLE PROFILE 访谈概况

A total of 805 Professionals Interviewed in 2018 共有805位营销专业人士接受了访谈

MARKETING PROFESSIONALS INTERVIEWED 受访客户	2016	2018
CREATIVE AGENCIES 受访客户与创意广告代理商关系	225	215
MARKETING SERVICES AGENCIES (BTL) 受访客户与线下市场营销服务代理商关系	70	76
DIGITAL AGENCIES 受访客户与数字营销代理商关系	121	159
MEDIA AGENCIES 受访客户与媒体代理商关系	195	154
CLIENT-AGENCIES RELATIONSHIPS ANALYSED 客户与代理商关系分析	2016	2018
CREATIVE AGENCIES 受访客户与创意广告代理商关系	263	272
MARKETING SERVICES AGENCIES (BTL) 受访客户与线下市场营销服务代理商关系	88	109
DIGITAL AGENCIES 受访客户与数字营销代理商关系	150	198
MEDIA AGENCIES 受访客户与媒体代理商关系	202	167
OTHER PROFESSIONALS INTERVIEWED 其他受访的专业人士	2016	2018
SENIOR PROFESSIONALS WORKING IN CREATIVE, BTL, MEDIA AND DIGITAL AGENCIES 资深代理商创意、限下、媒体或数字营销专业人士	242	199
TRADE PRESS PUBLICATION EDITORS ON CREATIVE, BTL, DIGITAL AND MEDIA AGENCIES 行业杂志编辑对创意、线下、媒体、数字营销代理商的看法	13	14
PROCUREMENT 客户方的采购部人员	28	32

QUESTIONNAIRE 调查问卷

The methodology used a semi-structured questionnaire with further open-ended questions that allowed interviewees to provide in-depth opinions. All quotes referring to each subscribing agency are included in the Individual and Confidential Report prepared for that specific agency. The average duration of interviews was 55 minutes.

本次研究采用半开放式问卷，另有若干开放式问题，以便受访者能够深入解答并提供意见。本报告如有引用内容提及订阅本报告的某一代理商，该代理商的《保密报告》也将包含这一引用内容。每段采访的平均时长55分钟。

TYPE OF INTERVIEW 采访类型

Face-to-face interviews were held using a closed questionnaire (with Senior Marketers or Senior Directors). 60% of interviews were done face-to-face in the offices of the client companies. On-line interviews were conducted to interview agency professionals and Procurement professionals.

调查采用面对面访谈形式，配合封闭式调查问卷。（对象为资深营销人员或高级主管）60%的采访在客户公司通过面对面访谈完成，线上问卷用于采集代理商专业人士和采购专业人士的意见。



DATES OF FIELDWORK

采访日期

Interviews with Marketing and Procurement Directors were conducted from July to November 2017.

营销和采购总监的受访日期为2017年7月至2017年11月。

Interviews with Agency Professionals and Trade Press were conducted from September to October 2017.

代理商专业人士和行业刊物专家的受访日期为2017年9月至2017年10月。

AGENCY SCOPE IS DEVELOPED IN 12 COUNTRIES

营销趋势研究在全球12个国家中展开调研



PROFILES OF MARKETERS INTERVIEWED

受访市场主概况

PROFILE OF COMPANIES BY OWNERSHIP STRUCTURE, TURNOVER, MARKETING BUDGET AND GEOGRAPHY

受访市场主的所有制结构、营业额、营销预算和地区分布情况

The 2018 survey comprised of 22% locally-owned companies, 60% foreign multinationals and 16.3% Chinese multinationals across Beijing, Shanghai and Guangzhou. This year saw an increase of respondents from Guangzhou, at 13.1% (up from 8.1% in 2016).

2018年调查对象包括北京、上海和广州三地22%的本土企业、60%的外资跨国企业和16.3%的中国跨国企业。今年广州的受访者数量有所增加，从2016年的8.1%增至13.1%。

STRUCTURE OF COMPANIES (MARKETERS) 公司架构

Company Turnover 公司营业额 (MILLION RMB 百万人民币)

& Marketing Budget 市场营销预算 (MILLION RMB 百万人民币)

	SHANGHAI 上海	BEIJING 北京	GUANDONG 广东	CHINESE MUL- TINATIONAL BUSINESS / BRAND 中国国际企业	FOREIGN MUL- TINATIONAL 外资国际企业	LOCALLY OWNED 国内本土企业
COMPANY TURNOVER 公司营业额 (MILLION RMB 百万人民币)	4,065	3,825	4,036	4,795	3,885	3,859
MARKETING BUDGET 市场营销预算 (MILLION RMB 百万人民币)	73.4	71.0	69.9	81.3	69.0	72.4
RATIO (MARKETING BUDGET / TURNOVER) 营销预算占营业额比例	1.81%	1.86%	1.73%	1.70%	1.78%	1.88%
BASE: MARKETING PROFESSIONALS INTERVIEWED 样本：受访市场主	208	113	53	66	246	91

RESPONDENTS BY JOB FUNCTION AND ROLE

受访者的工作职能和职位

Respondents were drawn from a cross section of job functions and roles to ensure balance. 51.4% operate at the Director level, with 46.8% defining their role as Marketing Director/Manager.

我们挑选了众多不同类型的职能和职位的受访者，以确保研究样本的平衡。51.4%的受访者为总监级别，46.8%的受访者为营销总监/经理。

SAMPLE PROFILE 访谈概况

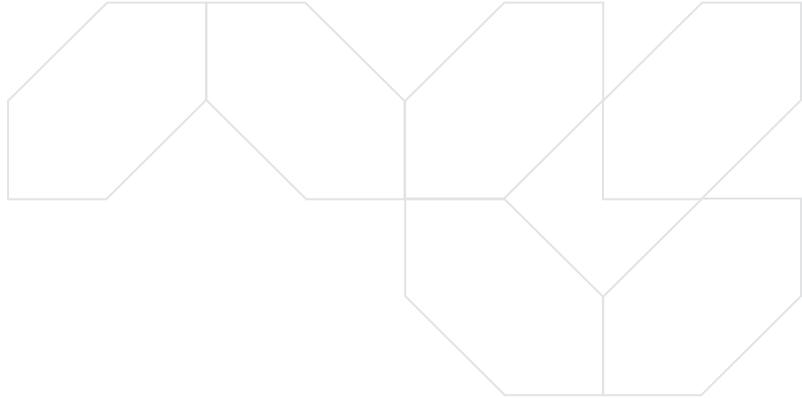
Interviewee Particulars 受访者信息

GENDER 性别	2016	2018
MALE 男	43.5	42.1
FEMALE 女	56.5	57.9
POSITION 职位	2016	2018
PRESIDENT, CEO, GM 总裁, 首席执行官, 总经理	7.3	2.7
MARKETING DIRECTOR / MANAGER 营销总监 / 市场经理	43.8	44.3
MEDIA DIRECTOR 媒体总监	6.4	4.4
GROUP BRAND DIRECTOR / MANAGER 集团品牌经理	21.8	33.0
E-COMMERCE / DIGITAL DIRECTOR / MANAGER 电子商务总监 / 数字营销总监 / 经理	6.4	6.1
COMMUNICATION DIRECTOR 传播总监	2.0	1.7
TRADE MARKETING DIRECTOR 市场渠道营销总监	6.4	2.7
OTHER 其它	6.0	5.1

CITY 受访者地区分布	2016	2018
SHANGHAI 上海	58.3	51.2
BEIJING 北京	24.9	27.8
GUANGDONG 广东	8.1	13.1
OTHER 其它	8.7	7.9

TENURE (AVERAGE YEARS) 任期 (平均年数)	2016	2018
CURRENT POSITION 当前职位	4.77	4.64
CURRENT COMPANY 在该公司任职	5.96	5.45

ROLE 职责	2016	2018
DIRECTOR & ABOVE 总监级别或以上	66.2	51.4
MIDDLE MANAGEMENT 非总监级别	33.8	46.8



PARTICIPATING MARKETERS

参与访谈的市场主

SAMPLE PROFILE 访谈概况

Participant Companies (309 companies/brands interviewed and 406 professionals). 157 (50.8%) agreed to appear as participants)

参与企业 (309家受访公司/品牌及406位受访市场主), 157位同意公开 (50.8%)



10 KEY TRENDS AND BEST PRACTICE

十大主要趋势与最佳实践

The R3-SCOPEN 2018 Agency Scope Study focuses on the TRENDS of the Advertising Industry and the PERCEPTION and PERFORMANCE of agencies in China. We interviewed 406 marketing leaders responsible for: marketing, communications and advertising in China, working across 306 different companies, managing 746 marketer-agency relationships. Here we highlight just 10 key trends; the detailed report contains many more. We also summarize our best practice recommendations to help marketers and their agencies leverage these trends.

Digital spends now account for 42.6% of the average marketing budgets, up from 25.4% just two years ago. When pressed on their future needs, 36.9% of respondents would choose a fully integrated agency model 'if it met all my communication needs' specifically to deliver a big brand campaign that requires multiple disciplines, showing that there is a desire for integration in the marketplace, even though the majority of marketers are currently working with specialized shops.

The number of different agency relationships employed by marketers continues on the general trend of consolidation established in the 2016 wave of the study, suggesting a gradual stabilization in marketer-agency relationships, but relationships are still of shorter duration compared to our global benchmark

胜三-SCOPEN《2018年中国营销趋势研究》重点关注营销行业的发展趋势，针对中国代理商的看法及表现评估，共采访了406位营销决策者，他们在中国市场负责营销、传播和广告方面的工作，分别来自于306家不同公司，管理着746个客户-代理商关系。本文将着重说明十大主要趋势，详细报告则包含更多细节。我们还总结了最佳实践的建议，旨在帮助市场主及其代理商抓住这些趋势，得到进一步的提升。

从今年的结果来看，数字营销在平均营销预算中所占的比重，从短短两年前的25.4%提高至42.6%。被问及未来的需求时，36.9%的受访者表示他们选择采用与一家整合营销代理商合作的模式，“前提是这种模式能够满足我所有的传播需求”，特别是在展开覆盖多个传播任务的大型品牌宣传活动时。这表明大多数市场主目前虽然与专项代理商合作，但仍希望能整合他们的市场营销投入。

市场主目前合作的不同代理商关系延续了2016年的整体数量减少之趋势，表明客户-代理商关系逐步趋稳，但是客户-代理商关系的平均时长仍然低于我们的国际基准，说明中国的代理商合作关系稳定度与全球均值仍然存在一定差距。



and China still has some way to go to reach global levels of stability.

In-house marketing teams are consistently involved in leading and directing key disciplines, especially: strategic planning, branded content, e-commerce, research and data analytics.

The fee/retainer remuneration model continues to be the most common, while the project-based model has gained in popularity. In addition, procurement teams are taking a larger role in the negotiations in the agency selection process for both communications and media agencies.

Finally, we asked respondents what challenges they will face in the future. When developing digital marketing, 58.6% of respondents identified justifying KPIs' effectiveness as their biggest challenge going forward. They also identified the speed of change in the market, internal digital transformation and difficulty in choosing the right digital agencies are challenges to overcome going forward.

市场主的营销团队在各关键专业领域中，持续增加其参与度，特别是在：策略规划、品牌内容、电子商务、研究及数据分析等事务上。

虽然固定服务费/年费模式仍然是最常见的报酬模式，项目制的收费模式正在日益普及。此外，在与营销传播和媒介代理商的挑选与谈判过程中，采购团队的参与及责任越来越大。

最后，我们询问受访者，他们未来会面临哪些挑战。当被问及发展数字营销时，58.6%的受访者认为如何验证关键业绩指标的有效性是他们当前最大的挑战。他们认为，市场的快速变化、企业内部的数字化转型以及难以找到合适的数字营销代理商，这些也都是未来发展需要克服的挑战。

1

DIGITAL TAKES UP TO 42.6% OF MARKETING BUDGETS

数字营销占整体营销预算的42.6%

Spending on digital marketing now accounts for a staggering 42.6% of the average marketing budget in China, up from 25.4% just two years ago. The shares of the marketing budget taken up by Below-the-line (BTL) and Above-the-line (ATL) spending have both decreased, now sitting at 29.5% and 27.8%, respectively.

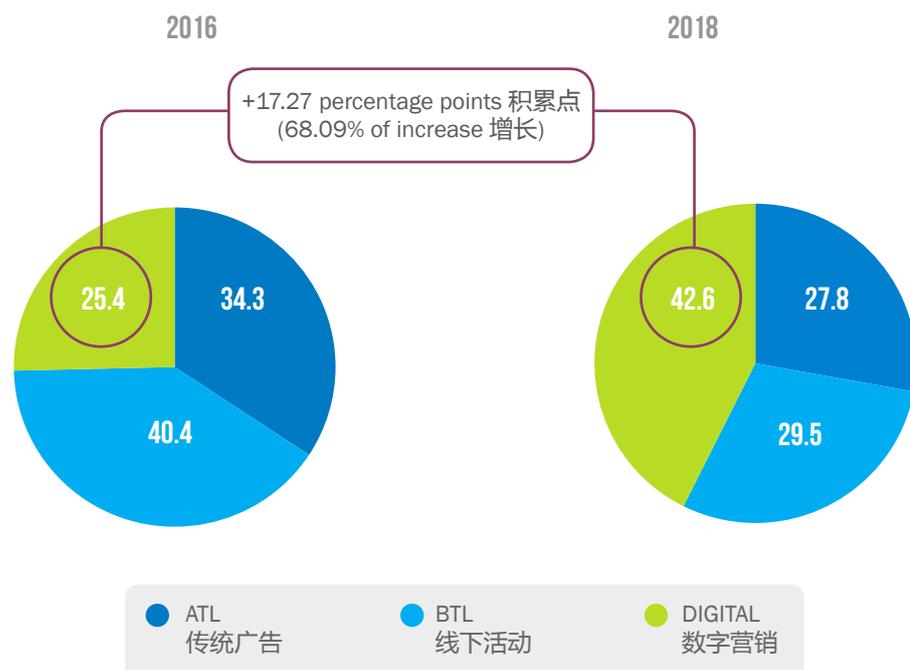
数字营销目前在中国平均营销预算所占的比重从短短两年前的25.4%增至42.6%，涨幅相当惊人。线下(BTL)和线上(ATL)在营销预算中所占的份额均有所下降，目前分别为29.5%和27.8%。

In the 2016 wave of this study, China still lagged behind markets like the UK, where digital accounted for 31.3% of marketing spending in 2016. However, Chinese marketers' digital spends have surpassed every other market in the study in just two years, reflecting China's rapidly growing digitally savvy consumer culture.

在2016年的调查中，中国仍是落后于英国等市场，后者数字媒体在2016年已经占到营销预算的31.3%。然而，仅经过短短两年的发展，中国市场主的数字营销占比已经超过了其他所有市场，说明中国数字消费文化正在高速发展。

STRUCTURE OF COMPANIES (MARKETERS) 公司架构

Marketing Budget 市场营销预算 (RMB 人民币)





R3-SCOPEN BEST PRACTICE

R3-SCOPEN最佳实践

Media budget allocation remains a major challenge for all marketers - digital is now a critically important component, but ATL still accounts for the bulk of media spending. We would argue that measuring overall marketing return on investment and the contribution from each media has never been more important.

媒体预算分配仍是所有市场主面临的重大挑战 — 数字媒体如今已成为重要组成部分，但传统媒体仍占据大部分的媒体开支。我们认为，衡量投资的总体营销回报率和不同媒体的贡献率在如今显得尤其重要。

Work closely with each agency partner to develop clear business goals, how they contribute to meeting those goals, and putting in place measurement criteria to judge how they are being met. Accountability should underpin media spending decisions. Set goals collaboratively with agency partners and build these into agency remuneration.

与各合作代理商共同商议并制定清晰的业务目标、如何实现目标，并设置衡量标准以判断目标实现度。媒体预算规划的决策需有可靠的资讯为基础。与合作代理商共同设定目标，并将其纳入代理商报酬规划之中。

2

BEST-IN-CLASS SPECIALIST AGENCY MODEL PREDOMINATES, BUT NEARLY 37% OF MARKETERS WOULD CHOOSE AN INTEGRATED AGENCY IF IT MET THEIR NEEDS

专项代理商合作模式占据着主导地位，但近37%的市场主希望在将来选择整合营销代理商合作模式，前提是该代理商必须能够满足其需求

When asked to describe their current agency relationship model, 89.2% of respondents revealed that they are working with specialized agencies in each discipline, with only 8% of marketers reporting that they work with integrated agencies.

我们请市场主描述了他们当前的代理商合作模式，89.2%的受访者表示他们与各个领域的专项代理商合作，仅8%的受访者表示他们正在与整合营销代理商合作。

China is well above the global benchmark for using specialized agencies, with other markets adopting a more integrated approach. There are several challenges in China preventing marketers from being able to achieve the “ideal” agency model. For example, 10.5% of respondents reported that there are no “ideal” integrated agencies in the market. Another consequence of this lack of integration is that 78.3% of Chinese marketers do not work with a lead agency to coordinate all communication activities, which is well off the global benchmark (47.7% of marketers do not have a lead agency).

中国市场主与专项代理商的合作比例远超国际均值，其他市场采用与整合营销代理商的合作模式比例较高。中国市场存在几项挑战，影响市场主实现“理想的”代理商模式，例如，10.5%的受访者表示市场上没有“理想的”整合营销代理商。这也导致了78.3%的中国市场主没有主导代理商来协助统筹所有的传播活动，这个比例远高于国际均值（47.7%的市场主没有主导代理商）。



When pressed on their future needs, 36.9% of respondents would choose a fully integrated agency model 'if it met all my communication needs' specifically to deliver a big brand campaign that requires multiple disciplines, showing that there is a desire for integration in the market-place.

被问及未来的需求时，36.9%的受访者表示他们会选择一个整合营销代理商合作的模式，“前提是这种模式能够满足我所有的传播需求”，特别是在需要展开覆盖多个传播任务的大型品牌宣传活动时，这表示他们有整合营销上的需求。

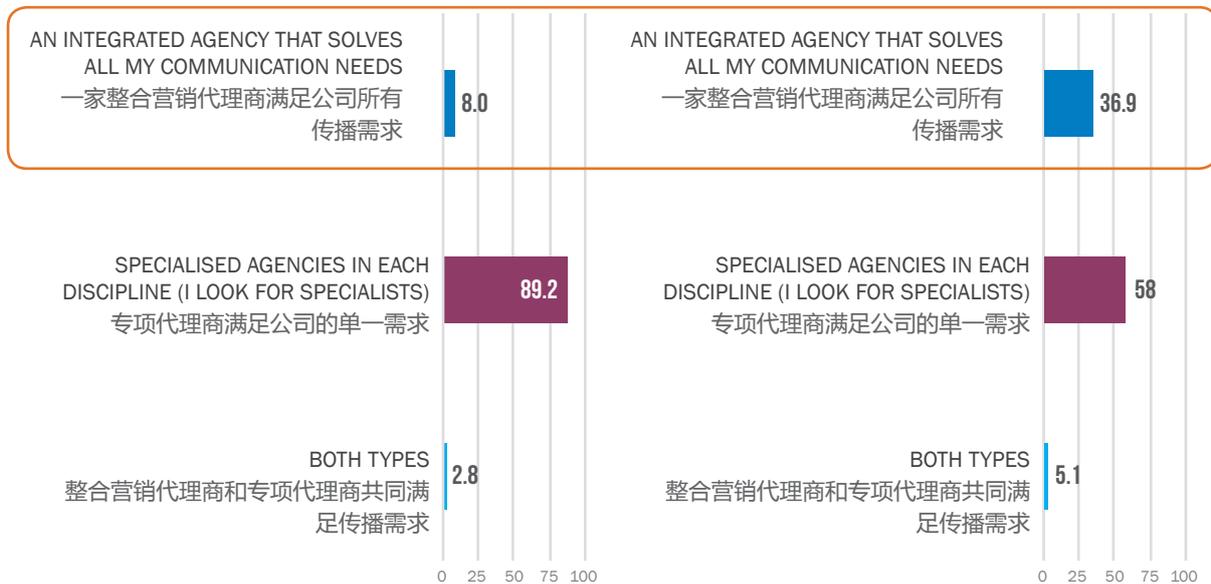
STRUCTURE OF COMPANIES (MARKETERS) 公司架构

Way of Working with Agencies (Integration vs. Specialisation)

与代理商的合作模式 (整合营销代理商 vs. 专项代理商)

WHAT IS YOUR CURRENT WORKING MODEL WITH YOUR AGENCY PARTNERS?
您现有的和您代理商之间的合作模式是怎样的？

IF IT WAS YOUR DECISION, IN THE FUTURE WOULD YOU RATHER PREFER TO WORK WITH?
如果由您来决定，您认为哪种合作模式是最理想的？



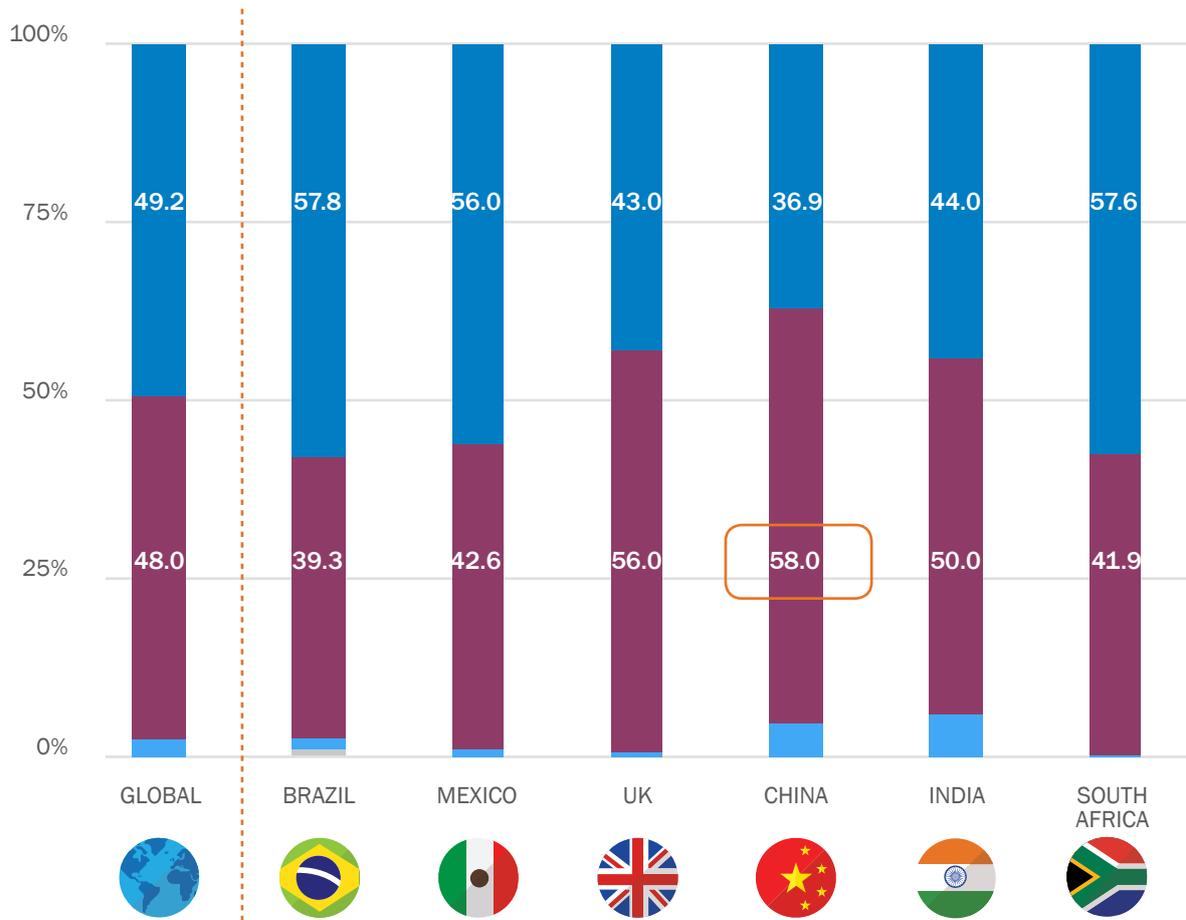
STRUCTURE OF COMPANIES (MARKETERS) 公司架构

Way of Working with Agencies (Integration vs. Specialisation)

与代理商的合作模式 (整合营销代理商 vs. 专项代理商)

IF IT WAS YOUR DECISION, IN THE FUTURE WOULD YOU RATHER PREFER TO WORK WITH?

如果由您来决定, 您认为哪种合作模式是最理想的?



- AN INTEGRATED AGENCY THAT SOLVES ALL MY COMMUNICATION NEEDS
一家整合营销代理商满足贵公司所有的传播需求
- SPECIALISED AGENCIES IN EACH DISCIPLINE (I LOOK FOR SPECIALISTS)
专项代理商满足贵公司的单一需求
- BOTH TYPES OF AGENCIES
整合营销代理商和专项代理商共同满足传播需求
- DK/NA
不知道/无答案



R3-SCOPEN BEST PRACTICE

R3-SCOPEN最佳实践

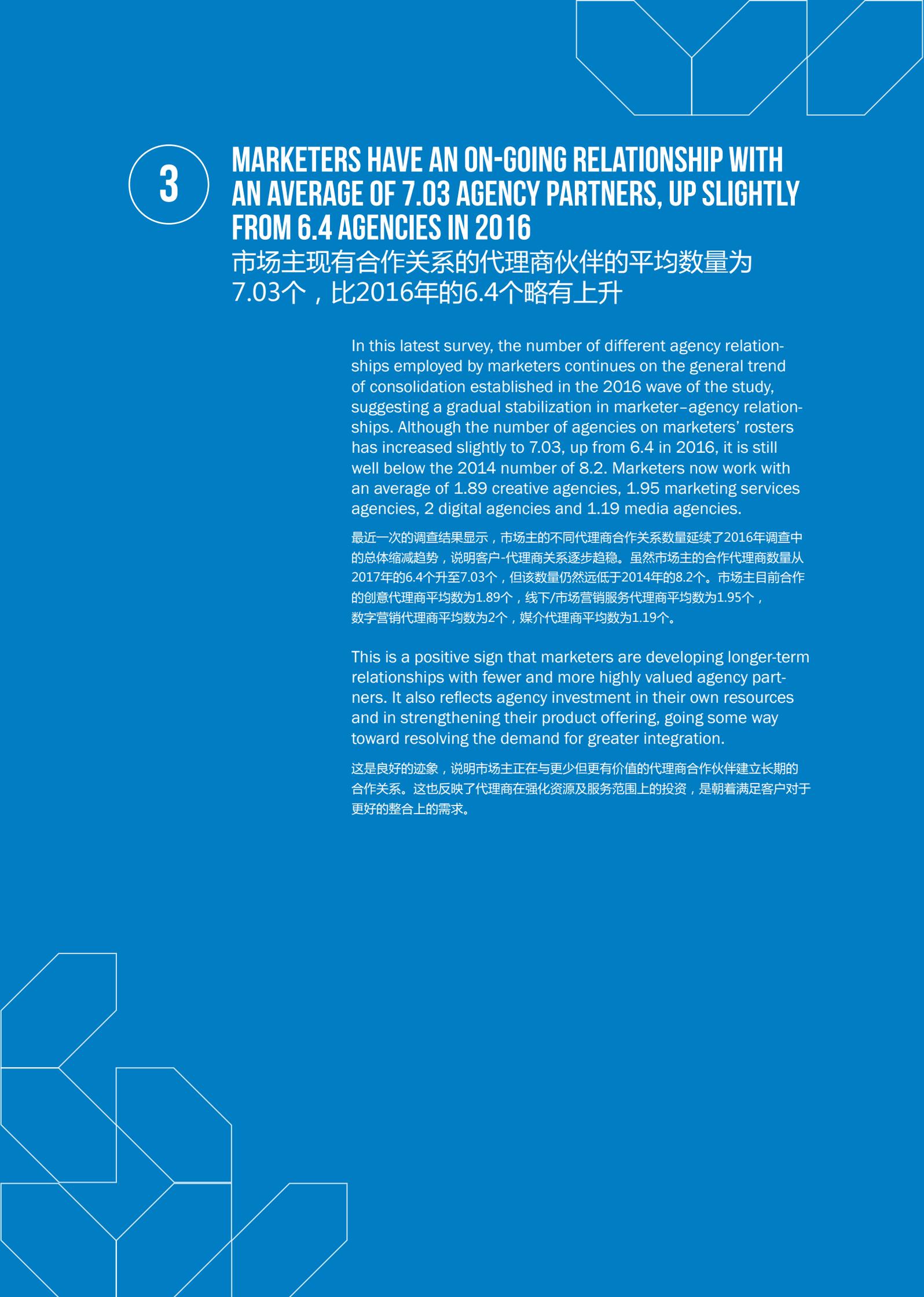
Agency Group holding companies are still coming to grips with a consistent one-stop agency offering across their sibling companies and this must be judged as work in progress. Agencies are highly skilled in working as cross-disciplined teams but, in our experience, this is all too often reactive-led by the marketer and not by the strongest or lead agency. Silos can still be difficult to break down.

代理商集团仍在试图通过旗下公司提供一站式代理商服务，但尚未完全成型。虽然代理商已具备部分跨领域的专业技能，但就我们的经验而言，这种方式通常由市场主推动，而非通过最强代理商或主导代理商推动。各自为战的情况仍然难以打破。

Evaluate your current agency model and conduct a thorough internal needs analysis and a critical appraisal of the company's internal marketing structure with appropriate stakeholders. But be realistic: would a highly centralized agency model really be a good fit with your company culture on the ground or could it bring much needed focus and discipline to a fragmented structure?

评估您的现有代理商合作模式，进行彻底的内部需求分析，并与相关单位一同评估公司营销运作结构。更实际的去分析：高度集中的代理商模式真的符合公司文化吗？它能够分散的组织结构带来更好的聚焦及规范？





3

MARKETERS HAVE AN ON-GOING RELATIONSHIP WITH AN AVERAGE OF 7.03 AGENCY PARTNERS, UP SLIGHTLY FROM 6.4 AGENCIES IN 2016

市场主现有合作关系的代理商伙伴的平均数量为7.03个，比2016年的6.4个略有上升

In this latest survey, the number of different agency relationships employed by marketers continues on the general trend of consolidation established in the 2016 wave of the study, suggesting a gradual stabilization in marketer-agency relationships. Although the number of agencies on marketers' rosters has increased slightly to 7.03, up from 6.4 in 2016, it is still well below the 2014 number of 8.2. Marketers now work with an average of 1.89 creative agencies, 1.95 marketing services agencies, 2 digital agencies and 1.19 media agencies.

最近一次的调查结果显示，市场主的不同代理商合作关系数量延续了2016年调查中的总体缩减趋势，说明客户-代理商关系逐步趋稳。虽然市场主的合作代理商数量从2017年的6.4个升至7.03个，但该数量仍然远低于2014年的8.2个。市场主目前合作的创意代理商平均数为1.89个，线下/市场营销服务代理商平均数为1.95个，数字营销代理商平均数为2个，媒介代理商平均数为1.19个。

This is a positive sign that marketers are developing longer-term relationships with fewer and more highly valued agency partners. It also reflects agency investment in their own resources and in strengthening their product offering, going some way toward resolving the demand for greater integration.

这是良好的迹象，说明市场主正在与更少但更有价值的代理商合作伙伴建立长期的合作关系。这也反映了代理商在强化资源及服务范围上的投资，是朝着满足客户对于更好的整合上的需求。

CLIENT-AGENCY RELATIONSHIPS 客户与代理商关系
Number of Agencies 合作代理商数量



R3-SCOPEN BEST PRACTICE

R3-SCOPEN最佳实践

The pitch from one-off campaign to one-off campaign is thankfully becoming much less common in the market as marketers develop longer term relationships with fewer key agency partners.

令人感到欣慰的是，随着市场主与数量更少的主要代理商建立长期的合作关系，市场上单次品牌推广活动的比稿变得越来越少。

The foundation of any good business relationship is the opportunity for feedback and measurement. It's why R3 built CAPE (Client Agency Performance Evaluation), to help marketers better assess their individual agency relationships. This diagnostic approach is a fundamental way to identify the best partners and fix the ones that aren't.

任何良性的业务合作关系建构在双方能够有机会给予彼此评估及反馈的基础上。这也是胜三建立CAPE（客户代理商表现评估）的宗旨，该工具旨在帮助市场主更好地评估每个代理商关系。这种诊断方法为寻找最佳合作伙伴，及改善不佳合作关系提供重要的基础。

4

THE AVERAGE LENGTH OF CLIENT-AGENCY RELATIONSHIPS IS 2.89 YEARS, DOWN SLIGHTLY FROM 3.55 YEARS IN 2016

客户/代理商关系的平均时长为2.89年，
相比2016年的3.55年略有降低

While the long-term trend in client-agency relationships has shifted toward stabilization over the last several years, in this wave of the Agency Scope study, we saw the average length of relationships decrease slightly from 3.55 years to 2.89 years. There are several factors that have contributed to the decrease, including the rise of project-based work and the lack of integrated solutions in the Chinese market.

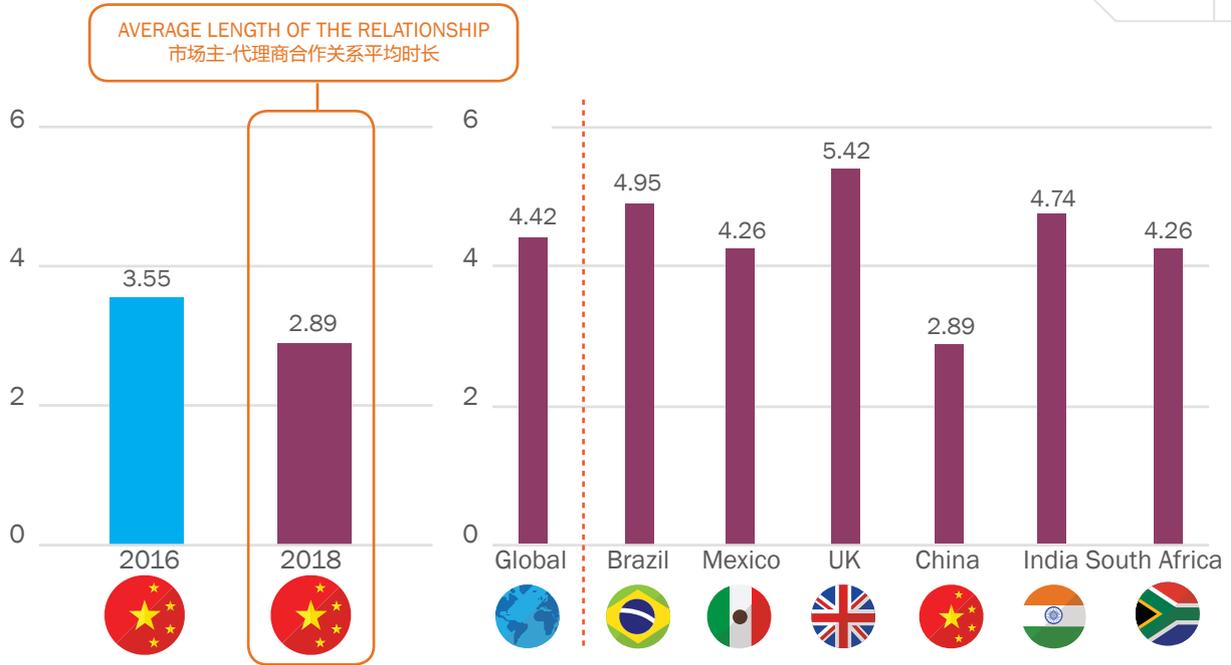
虽然客户/代理商关系过去几年长期来看逐步趋稳，但在今年的《营销趋势研究》中，我们发现客户/代理商关系的平均时长已从3.55年缩短至2.89年。这一数字减少存在多个原因，包括中国市场项目制的合作关系增加以及缺乏整合的解决方案。

Marketer-agency relationships in China have gradually stabilized over the last decade – when we first started this survey, the average relationship was just 2.3 years – but relationships are still of shorter duration compared to our global benchmark and China still has some way to go to reach global levels of stability.

在中国，客户-代理商关系在过去十年中逐步趋稳，当我们第一次进行这个趋势研究时，客户-代理商合作关系平均只有2.3年。即便如此，目前的客户-代理商合作关系相比全球基准仍然较短，表明中国与全球较稳定的合作关系水平之间仍然存在差距。

CLIENT-AGENCY RELATIONSHIPS 客户与代理商关系

Length of the Relationships (with Current Agencies) 市场主-代理商关系时长 (目前合作的代理商)



R3-SCOPEN BEST PRACTICE R3-SCOPEN最佳实践

The slight decrease in marketers' length of tenure in their current roles is a factor in the decrease of agency stability in this wave of our study; our respondents have been in their current positions for an average of 4.6 years and with their current companies, 5.4 years. Both numbers have decreased from the 2016 survey.

今年的调查结果显示，客户-代理商合作时长的缩短与市场主的工作稳定性降低有关；我们的受访者在现职的平均任期为4.6年，其在当前公司的平均服务期则为5.4年，相比2016的研究结果均有下降。

Develop long term relationships by evaluating your agency regularly, and giving open and constructive feedback. Have the agencies evaluate the marketing team in the same way to identify potential roadblocks to effective and efficient partnerships.

透过定期评估代理商，并给予开放且建设性的反馈，来发展长期合作关系。由代理商以相同的方法评估市场团队，能找出潜在的阻碍，并建立更好效果及效率的合作伙伴关系。

In this new era of collaboration, one technique we have recently seen paying dividends is to have agencies also evaluate each other – how well is your media agency rated by your digital agency? What can your digital agency teach your advertising agency about improved processes? These steps are all about driving results and better ideas sooner.

面对客户-代理商合作的新时代，我们最近发现，让代理商相互之间进行评估能带来不同的效益。——你的数字代理商如何评价你的媒介代理商？对于流程改善，你的数字代理商能给你的创意广告代理商提供什么意见？这些作法是为了能更快地提升产出并催生更好的创意。

5

AGENCY PARTNERS STILL HIGHLY VALUED, BUT IN-HOUSE RESOURCES ARE TAKING THE LEAD ROLE ACROSS SEVERAL MARKETING DISCIPLINES

代理商依然受到重视，但在不同营销领域中，客户内部资源逐渐发挥主导作用

In-house marketing teams are consistently involved in leading and directing key disciplines, especially: strategic planning, branded content, e-commerce, research and data analytics: 88.8% of respondents say strategic planning is led in-house, up from 87.1% in 2016. 68.3% of branded content is led in-house as is 55.3% of e-commerce, 55% of research and 52% of data analytics.

市场主的市场团队在各关键专业领域中，不断参与指导，特别是在：策略规划、品牌内容、电子商务、研究及数据分析等工作项目上：88.8%的受访者表示策略策划由市场主内部主导，比2016年的87.1%有所上升。68.3%的品牌内容、55.3%的电子商务、55%的研究及52%的数据分析均由市场主扮演主导角色。

In contrast, 78.5% of creative and advertising development resides firmly within advertising agencies, although that number is down from 88.4% in 2016 as in-house teams continue to get more involved. Media continues to be led by specialist media agencies, and the in-house involvement in media has actually decreased over 2016 as the media ecosystem continues to grow and fragment, with 45.9% of marketers closely involved with media planning and 34.1% leading media buying (down from 58.6% and 46.1% in the last wave).

相比之下，78.5%的创意及广告策划依旧由创意广告代理商主导，但随着客户公司内部的参与度逐渐提高，这一比重相较2016年的88.4%还是有所下降。媒体项目仍由专业媒介代理商主导，且随着媒体生态系统继续发展和细分，客户公司内部的媒体项目参与度比起2016年有所降低，45.9%的市场主密切参与媒体策划，34.1%的公司会主导媒体购买（上次调查中这两项的比重分别为58.6%和46.1%）。

STRUCTURE OF COMPANIES (MARKETERS) 公司架构

Who does What? (Services carried out by Marketers with the help of their Partners and/or Internally)

工作分配 (由市场主管理代理商和/或内部团队合作完成)

GENERAL SERVICES 主要服务	RESEARCH 市场调研	DATA 数据分析	STRATEGIC PLANNING 品牌策略规划	CREATIVE DEVELOPMENT 广告创意	PRINT PRODUCTION 平面广告制作	TV PRODUCTION 电视广告制作	BRANDED CONTENT 品牌内容营销	PR 公关
INTERNALLY 内部员工参与	55.6	52.0	88.8	43.5	34.1	31.4	68.3	39.6
ADVERTISING AGENCIES 创意广告代理商	3.3	3.9	52.6	78.5	74.9	74.3	38.1	4.2
MEDIA AGENCIES 媒体代理商	5.4	18.4	6.9	3.3	3.0	2.7	16.6	1.5
BTL / MARKETING SVC AGENCIES 线下/市场营销服务代理商	3.0	2.7	3.0	2.4	4.2	0.3	1.8	5.7
DIGITAL AGENCIES 数字营销代理商	5.4	26.3	8.8	12.7	9.4	3.9	30.8	5.7
BAT RELATED PLATFORM 内容平台	1.8	2.7	0.6	1.2	0.3	0.6	8.8	-
WEBSITE DEVELOPMENT AGENCY 网站建设代理商	-	-	-	-	-	-	-	-
PRODUCTION AGENCY 制作代理商	-	-	-	-	-	0.6	-	-
CRM AGENCY CRM 代理商	-	0.3	-	-	-	-	-	-
DATA TRACKING AGENCY 数据跟踪代理商	-	2.4	-	-	-	-	-	-
PR AGENCY 公关代理商	-	0.3	0.6	-	-	-	0.3	17.5
RESEARCH COMPANY 调研公司	26.6	1.8	-	-	-	-	-	-
TPA (TMALL PARTNER AGENCY) 电商运营公司	-	-	-	-	-	-	-	-
OTHER 其他	1.5	1.5	0.9	-	-	-	1.3	0.6
DOES NOT DO 不负责	17.8	17.2	4.2	12.1	14.2	19.3	13.6	33.8
AVERAGE OF PARTNERS INVOLVED 平均参与代理商个数	1.43	1.48	1.71	1.64	1.49	1.43	1.98	1.36

STRUCTURE OF COMPANIES (MARKETERS) 公司架构

Who does What? (Services carried out by Marketers with the help of their Partners and/or Internally)
工作分配 (由市场主管理代理商和/或内部团队合作完成)

MEDIA SERVICES 媒体服务	MEDIA PLANNING 媒体规划	MEDIA BUYING 媒体购买
INTERNALLY 内部员工参与	45.9	34.1
ADVERTISING AGENCIES 创意广告代理商	4.8	3.6
MEDIA AGENCIES 媒体代理商	67.4	68.6
BTL / MARKETING SVC AGENCIES 线下/市场营销服务代理商	0.6	1.5
DIGITAL AGENCIES 数字营销代理商	10.9	10.3
BAT RELATED PLATFORM 内容平台	1.2	2.1
WEBSITE DEVELOPMENT AGENCY 网站建设代理商	-	-
PRODUCTION AGENCY 制作代理商	-	-
CRM AGENCY CRM 代理商	-	-
DATA TRACKING AGENCY 数据跟踪代理商	-	-
PR AGENCY 公关代理商	-	0.3
RESEARCH COMPANY 调研公司	-	-
TPA (TMALL PARTNER AGENCY) 电商运营公司	-	-
OTHER 其他	-	0.9
DOES NOT DO 不负责	14.2	14.2
AVERAGE OF PARTNERS INVOLVED 平均参与代理商个数	1.56	1.45



R3-SCOPEN BEST PRACTICE

R3-SCOPEN最佳实践

Consumers are fragmenting and marketers and agencies are doing more to reach them. The resources needed to run an ‘always-on’ 24/7, fragmented, multi-approach campaign, and evaluate the analytics involved is far more complex than it was just a few years ago. This only leads to one solution: train, promote, and hire more and better people.

消费者越来越分散，市场主和代理商需要采取更多举措来争取消费者。需要运用各类资源及途径来达成“不间断”的全天候营销策略，而且评估分析的方式方法比几年前更为复杂。这些都指向一种解决方案：培训、晋升，以及聘用更多、更优秀的人才。

The most successful marketers we work with have a strong internal nurturing culture of constant training and fast tracking. The critical areas of strategic development and direction mean leading cross-discipline teams drawn from the Brands, Sales, HR, IT and Analytics, adtech and social media, and requiring strong internal management and resources.

与我们合作的成功市场主，通常都有健全的内部人才培养文化，他们为员工提供长期培训以及快速晋升通道。从策略发展及方向制定的关键需求来评估，人才培育的重点在于，带领来自不同领域的人员（品牌、销售、人事、IT及分析、广告技术和社交媒体），组成跨部门团队来开展工作，同时必须具备强大的内部管理能力和资源。



6

MOST MARKETERS SATISFIED WITH THEIR CURRENT AGENCY PARTNERS, BUT ONLY 43% SAY THEY WON'T CHANGE AGENCIES

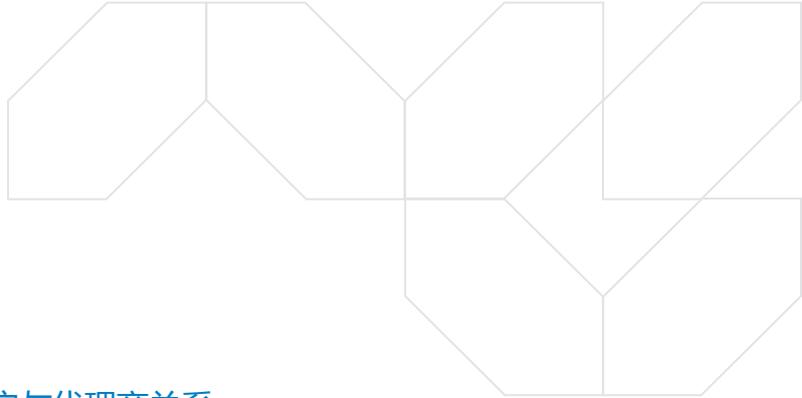
大多数市场主对其目前的代理商合作伙伴感到满意，但仅43%的市场主表示他们不会更换代理商

BTL agencies score the highest, with marketers 74.3% either very satisfied or satisfied with their current relationship, followed by 71.2% of marketers satisfied with their Digital agency. Creative agencies score lower, with 69.9% satisfied with media agencies dropping to 62.3%. That means around a third of all marketers are either indifferent to or dissatisfied with their current agency relationship. Only 43% of respondents asserted that they definitely would not be changing agencies, while others said they probably won't change, or that it wasn't their decision.

最令市场主满意的是线下代理商，74.3%的市场主都对其当前的线下代理商感到十分满意或较为满意，其次是数字代理商，有71.2%的市场主对其当前的数字代理商感到满意。创意代理商位居第三，69.9%的市场主对其感到满意，对媒介代理商感到满意的市場主则降至62.3%。这意味着总体上有三分之一的市场主对当前代理商的服务觉得一般或不满意。仅43%的受访者明确表示他们绝不会更换代理商，其他受访者表示他们可能不会更换代理商，或表示决定权不在他们手上。

But predisposition to changing agencies is higher in China than in our other benchmarked markets, reflecting the shorter agency relationship tenure.

在中国，更换代理商的倾向要高于其他基准市场，表明中国的市场主与代理商的合作期限较短。



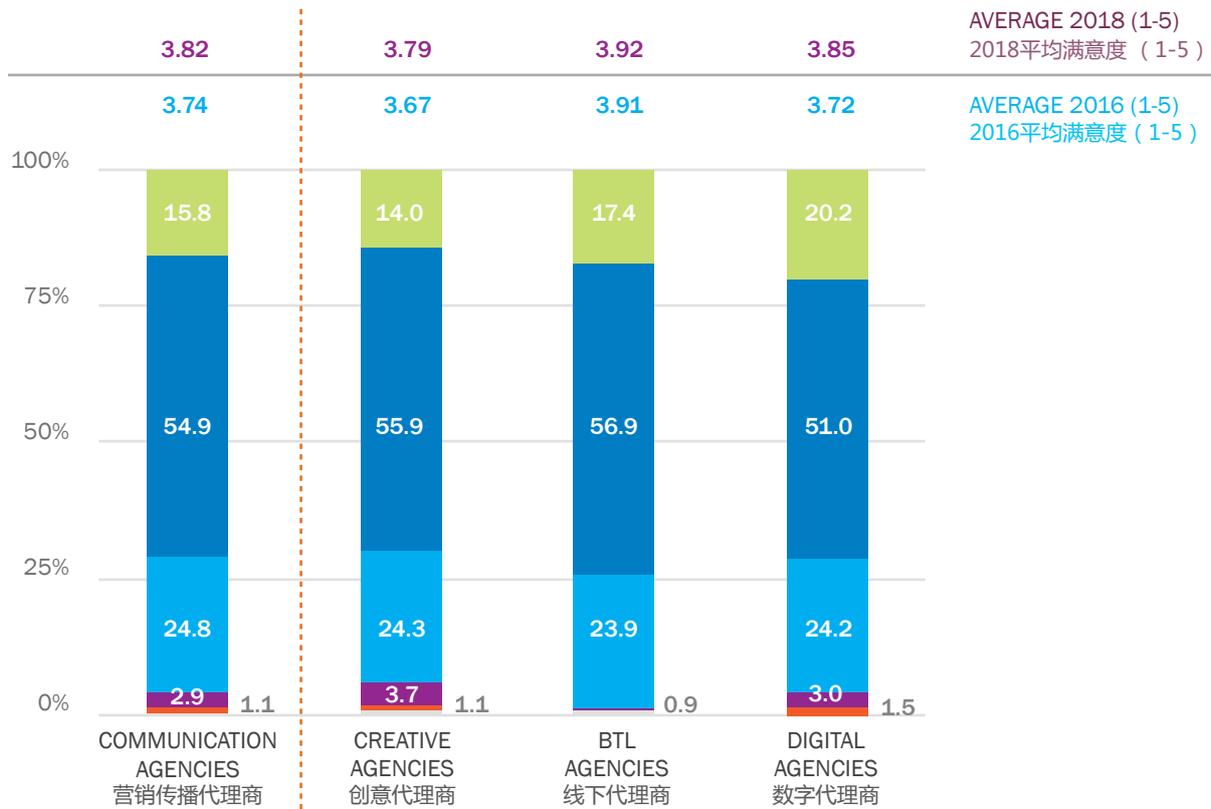
CLIENT-AGENCY RELATIONSHIPS 客户与代理商关系

Level of Satisfaction (Scale 1-5 Points)

满意度 (1-5分)

HOW SATISFIED ARE YOU WITH YOUR AGENCY/IES?

您对目前的合作代理商满意程度如何？

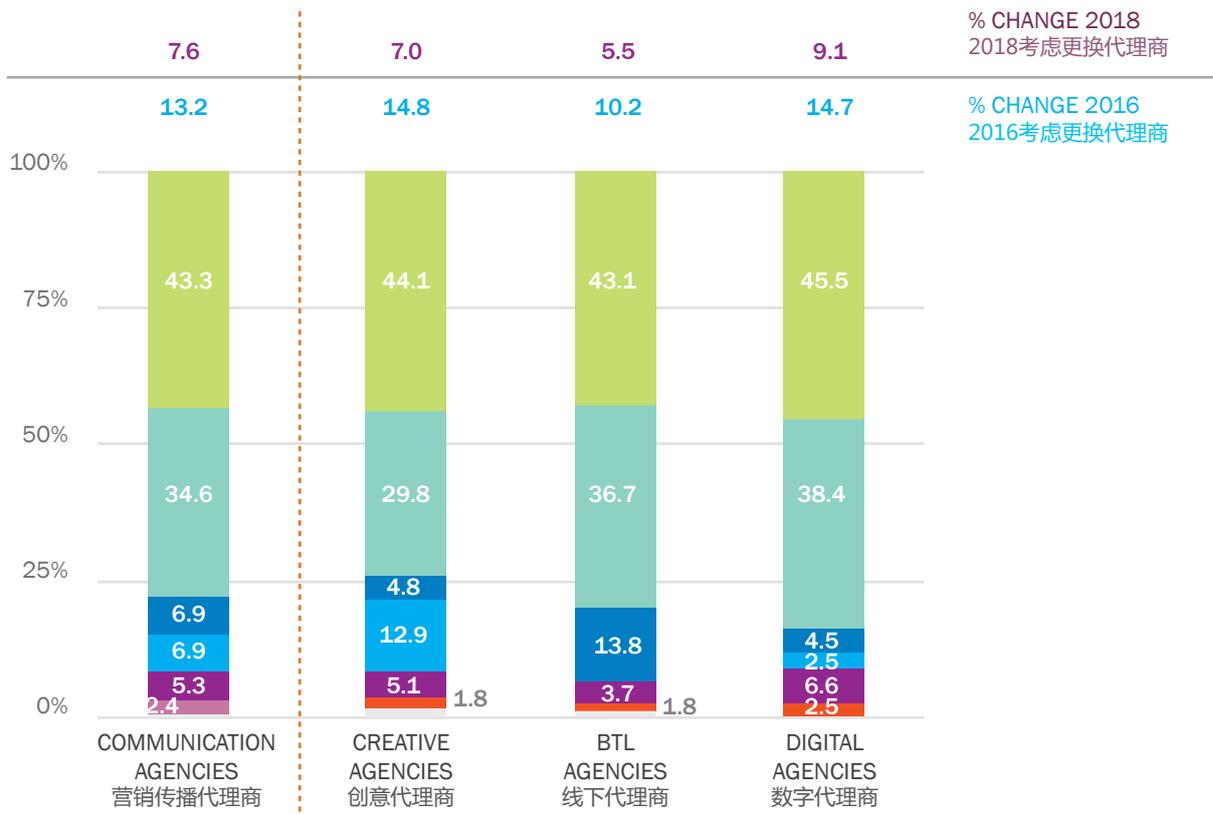


- VERY SATISFIED (5)
非常满意
- SATISFIED (4)
满意
- INDIFFERENT (3)
一般
- DISSATISFIED (2)
不满意
- VERY DISSATISFIED (1)
非常不满意
- DK/NA
不知道/不适用

CLIENT-AGENCY RELATIONSHIPS 客户与代理商关系

Change of Agency (according to a scale of intention to change)
更换代理商倾向

ARE YOU CONSIDERING CHANGING YOUR COMMUNICATION AGENCY/IES? 您是否会考虑更换代理商



“Cannot meet client needs” and “digital capabilities” are amongst the most frequently mentioned reasons for changing to another agency. For communications agencies, 19% of respondents mention both of these factors as their key reason. For media agencies, 30% of respondents mentioned “strategic planning capabilities” as the main reason for changing agencies. They also mentioned account services and creativity/innovation as other reasons for deteriorating relationships.

“无法满足客户需求”和“数字能力”是更换代理商最为常见的原因。对于营销传播代理商而言，19%的受访者认为上述两个因素是更换代理商的主要原因。对于媒介代理商而言，30%的受访者认为“策略规划能力”是更换代理商的主要原因。受访者还提到了客户服务和创意/创新等其他令合作关系僵化的原因。

Online, trade media, ad awards, events and seminars are all highlighted as important ways marketers stay in touch with what’s happening in the industry. But the most effective form of communication from agency new business teams are: case studies mentioned by 19.5% of marketers, followed by social networks (19.5%) and research about my sector (19%). Surprisingly, 35.1% of respondents said that “no action seems useful”.

网络、行业媒体、广告奖项、活动及研讨会是市场主了解当前行业形势的重要途径。目前，市场主表示代理商最有效的传播渠道为：案例研究（19.5%），表示是社交网络（19.5%），及行业相关研究（19%）。令人意外的是，35.1%的受访者表示“没有特别有效的渠道”。



R3-SCOPEN BEST PRACTICE

R3-SCOPEN最佳实践

Meeting marketer expectations is always going to be the number one challenge for agencies and our survey shows generally fair levels of satisfaction. Problems and issues will inevitably threaten even the most stable relationships; therefore, open and honest feedback is critical.

代理商面临的最大挑战始终是如何满足市场主的期望，我们的研究显示市场主满意度有待提高。但即便是最稳定的关系，也会面临各种问题的威胁，因此开放、坦诚的反馈至关重要。

With an effective evaluation process in place, there should be a mechanism to identify issues and put into place plans for improvement. The agency should be given feedback and a fair chance to improve performance. When all else fails and a pitch is inevitable, our most valuable learning is time. Don't underestimate the time and complexity of the pitch process, and if a pitch is called, be open and transparent with current partners.

建立有效的评估流程后，应该设立“发现问题”的机制，并制定相应的改进方案。市场主应该向代理商提供反馈，并给予他们提升表现的机会。如果各种努力及尝试皆无效，不得不进行比稿时，最需要注意的就是时间。不要低估比稿流程所需的时间及复杂程度。如果确实要比稿，请务必对当前的合作伙伴做到公开透明。

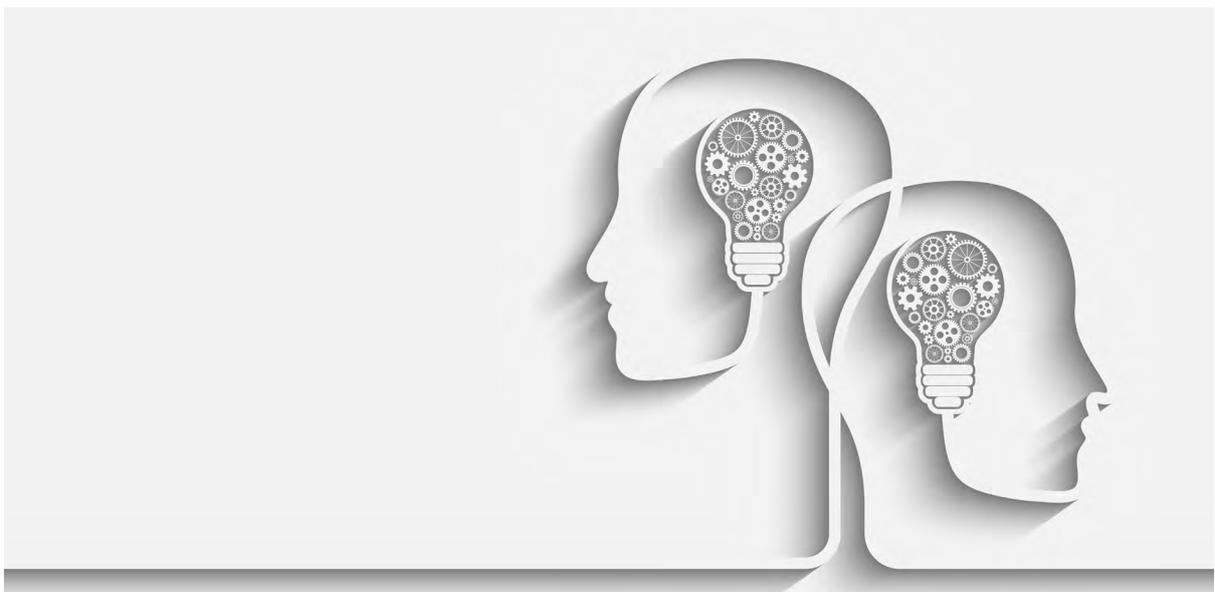
7

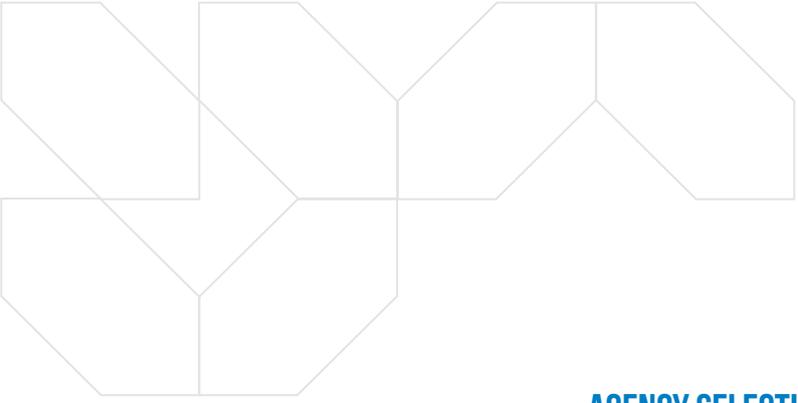
66% OF MARKETERS NAME CREATIVITY/INNOVATION AS THE MOST IMPORTANT CHARACTERISTIC OF THEIR IDEAL ADVERTISING AGENCY

66%的市场主将创意/创新视为为理想创意广告代理商最重要的特点

When a pitch is called, marketers at the shortlist stage list specific criteria for creative agencies, including: creativity, expertise and past relationships, all of which are ranked highly in the 2018 wave of the study. For advertising agencies, 29.4% of respondents mentioned creativity and innovation as a reason to add an agency to the shortlist. They also mentioned the agency's expertise or experience, and having a past relationship (27.6% and 17.5%, respectively). The agency's image or reputation has seen a significant decrease in importance from 2016, signifying the increasing importance of capabilities and relationships when creating a shortlist.

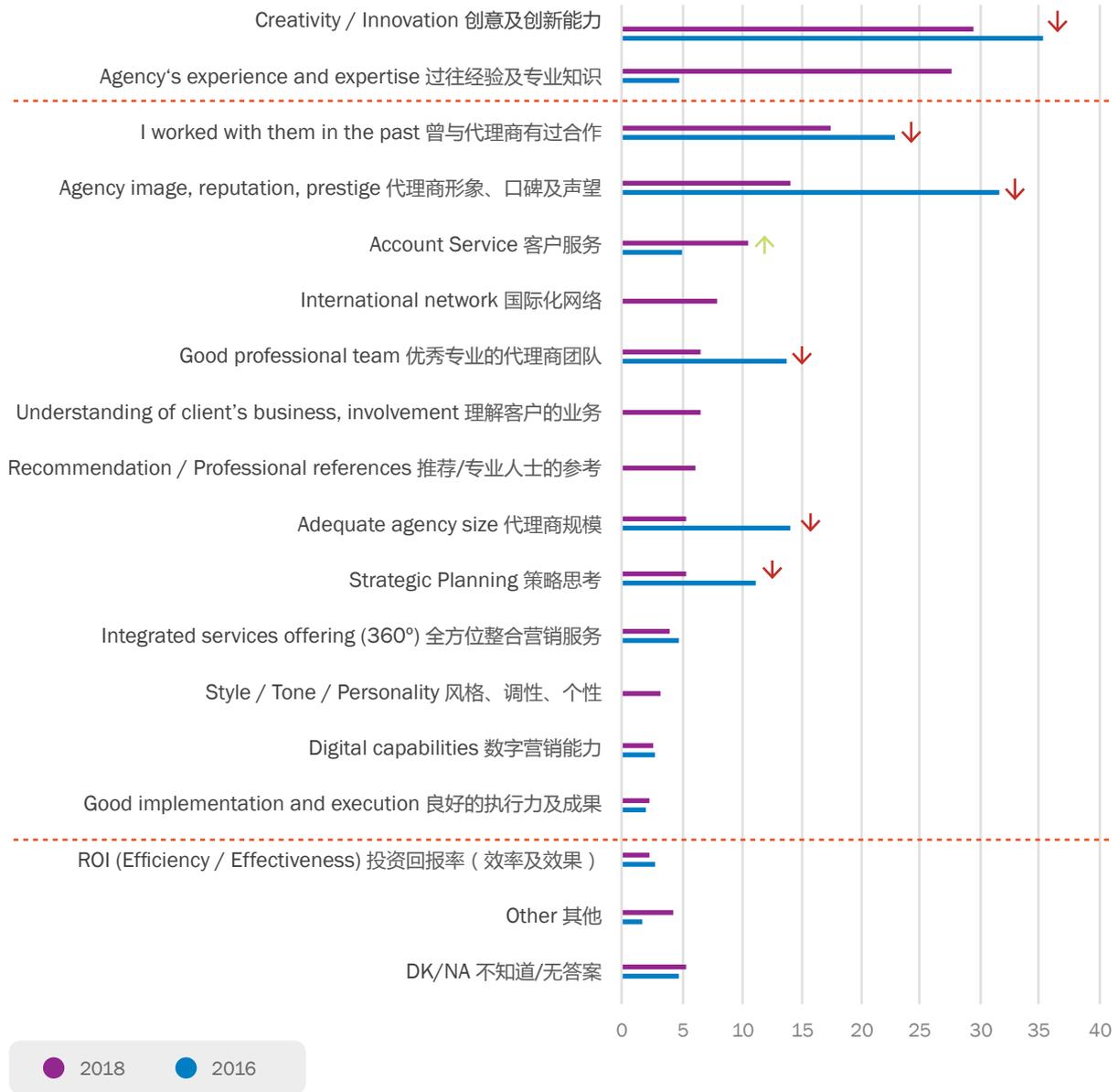
2018年调查发现，在进行比稿时，市场主着重关注创意代理商的特定属性（包括：创意、专业及过往合作关系，皆被高度关注），并据此制定最终比稿的候选名单。就创意广告代理商而言，29.4%的受访者表示创意和创新是将其纳入最终候选名单的原因之一。27.6%的市场主还提到了代理商的专业或经验，17.5%的市场主提到了过往的合作关系。代理商形象或声誉的重要性从2016年开始大幅降低，能力与合作关系在制定最终比稿的候选名单中的重要性不断提高。





AGENCY SELECTION 选拔代理商

Criteria Used to Create a Short List of Advertising Agencies 创意广告代理商甄选短名单标准

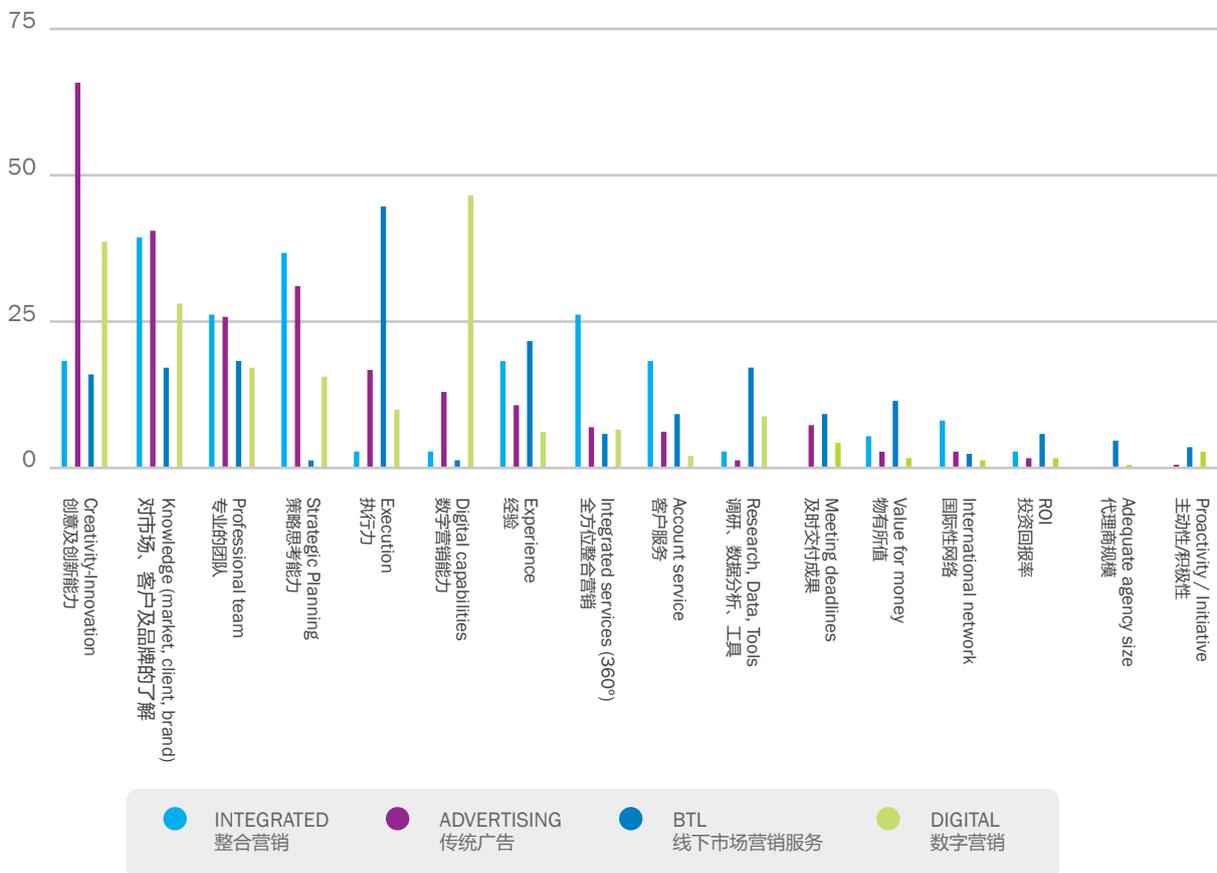


When probed on their communication agency selection criteria, creativity and experience top the list of key attributes marketers want in their ideal advertising agency. For advertising agency selection, 66.1% score creativity and innovation most highly; 40.7% highlight knowledge and experience (of brand, sector, business); and 31.3% demand strong strategic planning, which should prompt agencies to continue to strengthen their strategic offering. BTL agencies are expected to offer strong implementation and execution, as was mentioned by 44.8% of respondents, with digital agencies needing strong all-round digital capabilities, as scored by 46.7% of respondents.

谈及选择营销传播代理商的标准时，创意和经验在市场主选择理想创意广告代理商的关键指标中排在前列。对于创意广告代理商的选择标准，66.1%的受访者高度重视创意与创新，40.7%强调在对于品牌、行业和业务方面的知识和经验，31.3%要求代理商具备强大的策略策划能力，这可以激励代理商持续强化其策略服务。44.8%的受访者希望线下代理商提供良好的执行力及成果，46.7%的受访者希望数字代理商具备强大的全方位数字能力。

AGENCY SELECTION 选拔代理商

Characteristics of the 'Ideal' Communication Agency 理想营销传播代理商特质

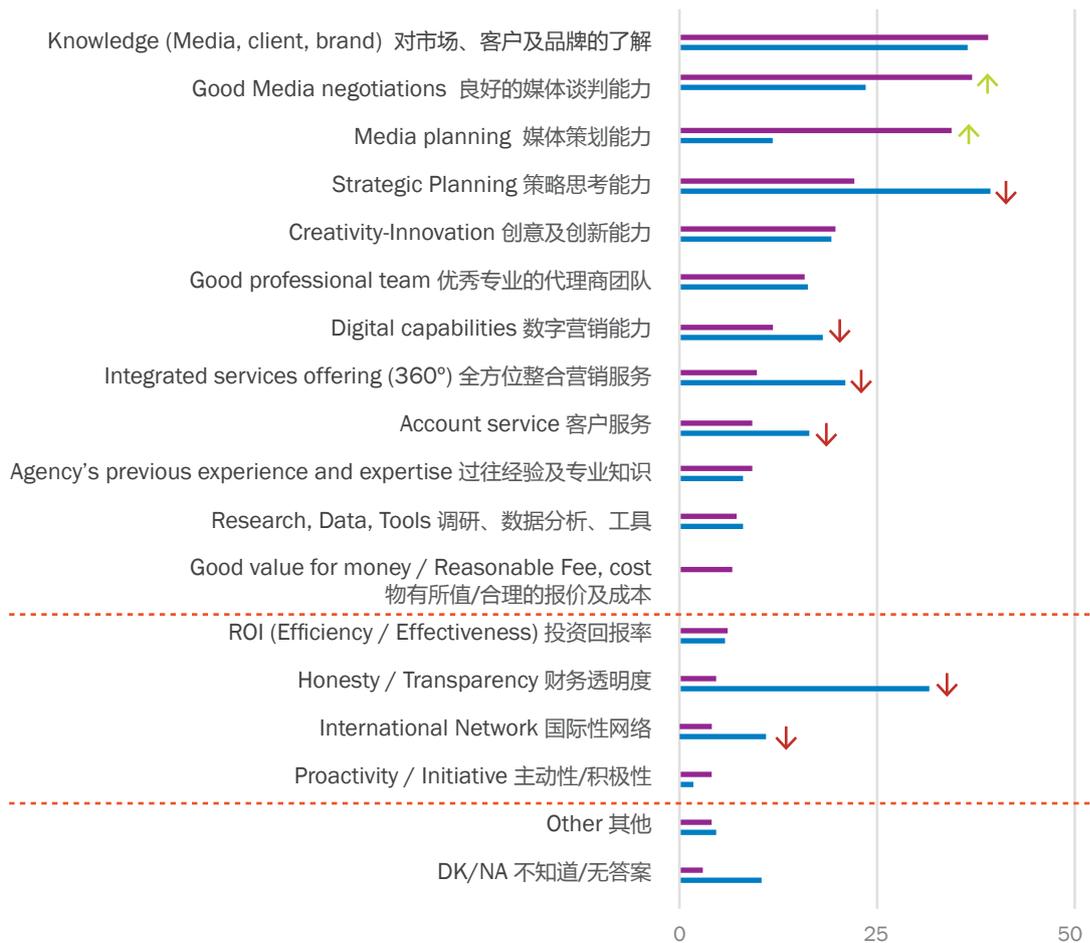


For the ideal media agency, 39% rank knowledge the brand, media and client most highly, whilst 37% of marketers rank good media negotiation skills as an ideal characteristic. When asked to list the criteria in an ideal integrated agency, marketers also ranked: media planning, strategic planning, creativity/innovation and a good professional team as key demands. These should feature strongly in any holding company agency model.

对于理想的媒介代理商，39%的受访者将对于品牌、媒体和客户的知识及了解列为最重要的因素，37%的市场主将优秀的媒体谈判能力列为理想的特质。当请市场主列举衡量理想的整合型代理商的标准，他们将媒体策划、策略策划、创意/创新及优秀的专业团队列为了关键要求。这些特质在与集团代理商合作模式中是至关重要的需求。

AGENCY SELECTION 选拔代理商

Characteristics of the 'Ideal' Media Agency 理想媒体代理商特质



● 2018 ● 2016



R3-SCOPEN BEST PRACTICE

R3-SCOPEN最佳实践

Agency pitches are expensive and time-consuming, a pitch process can take up to 12 months or even more, and should be a last resort when all else has failed.

比稿需要耗费大量金钱和时间，比稿流程有时可持续12个月甚至更久，应该作为在尝试其它措施均失败后的最后解决方案。

Evaluate where you are, and set measurable goals and benchmark for a successful pitch outcome. Define agency selection criteria in consultation with key stakeholders and include these in the agency RFP.

评估品牌的现实状况，制定可衡量的目标和基准，以取得成功的比稿结果。与相关内部团队共同商定代理商选择标准，并在比稿RFP资料中清晰说明此需求。

8

AGENCY PITCH IS STILL THE MOST POPULAR PROCESS FOR SELECTING A NEW AGENCY PARTNER, BUT TRIAL AND PROJECT-BASED ASSIGNMENTS ARE ON THE RISE

比稿仍是市场主挑选新合作代理商时最常采取的方式，但是透过试验性的工作任务或单个项目合作来挑选的方式日益增多

Amongst those deciding to review their current creative agency relationships, 96.1% of respondents would use a pitch process. 24.6% would use a trial assignment, either on its own or as part of a pitch process. Not surprisingly, Chinese marketers would call a pitch more frequently vs. our global benchmark. For media agencies, the 2018 wave of the study saw a massive increase in the occurrence of media agencies being appointed by the global team without a pitch, with 27.9% of marketers identifying this method of agency appointment.

决定重新审视当前与创意代理商关系的市场主中，96.1%的受访者会采用比稿的方式来挑选新的代理商。24.6%会采用试验性的工作任务，可能单独进行，也可能作为比稿流程的一部分。意料之中，中国市场主进行比稿的频率高于全球基准。对于媒体代理商而言，2018年的调查发现，媒体代理商在中国直接由品牌方全球委任的情况大幅增加，约有27.9%的市场主是采用这种方式。

Remuneration for pitches is decreasing for both communication and media agencies in China, with 82.6% of marketers reporting that communication agencies are never compensated for a pitch, and 84.6% reporting the same for media agencies.

中国传播和媒介代理商的有偿比稿量均有所下降，82.6%的市场主表示从不为营销传播代理商提供比稿报酬，84.6%的市场主表示不会为媒介代理商提供比稿报酬。

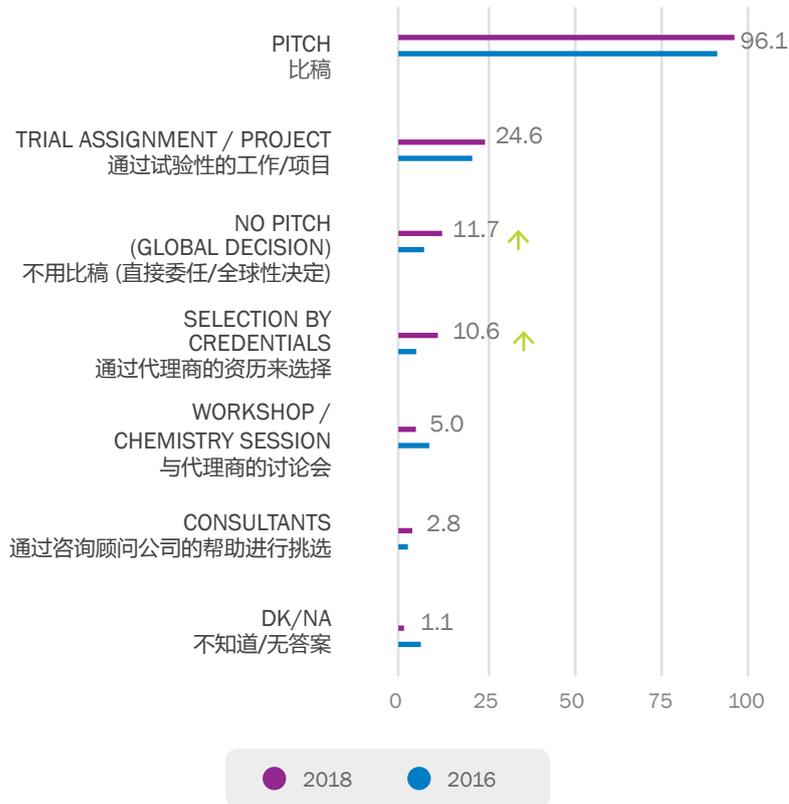
AGENCY SELECTION 选拔代理商

Selection Methods of Communication Agencies

创意代理商选拔方式

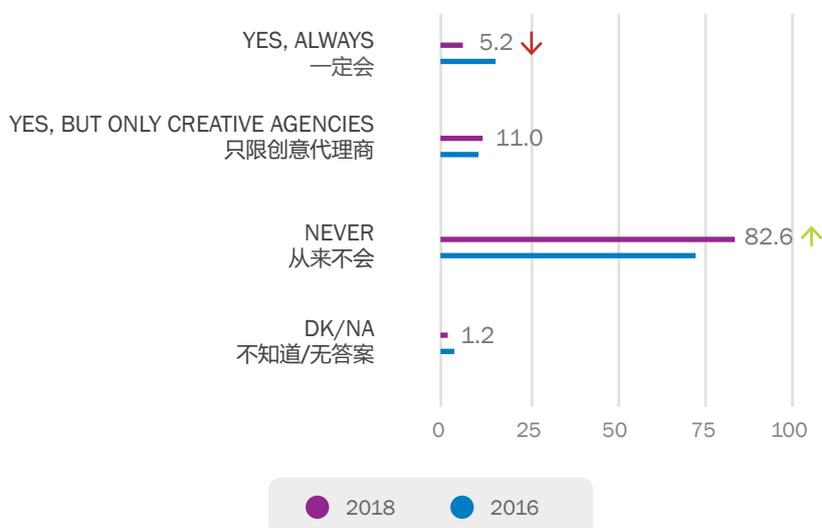
WHAT METHOD DO YOU USE TO APPOINT A NEW AGENCY?

您会使用哪些方式来委任新的代理商？



DO YOU PAY AGENCIES PARTICIPATING IN A PITCH?

您会付创意代理商和媒体代理商比稿费吗？





R3-SCOPEN BEST PRACTICE

R3-SCOPEN最佳实践

Agency pitches involve a lot of work from the agency side, for which they are rarely reimbursed.

在比稿过程中，代理商需要筹划许多工作，但他们很少得到报酬。

If an agency is going to make a presentation, it has to be relevant and focused to stand out. For marketers, that means giving a clear brief and expectations, as well as having transparent selection criteria. For agencies, that means taking the time to really understand the problem and to keep ideas and the solutions focused on the brands, otherwise it won't get the attention it deserves.

若代理商要竭尽全力做好提案，他们必须紧扣主题、切中要点。对于市场主而言，这意味着他们需要提供清楚的需求简报及期望，同时有透明清晰的选择标准。代理商则需要花时间去真正了解核心问题，提供与品牌紧密相关的创意和解决方案，否则就无法得到应有的关注。



9

FEE/RETAINER IS STILL THE MOST COMMON AGENCY REMUNERATION MODEL, BUT THE PROJECT-BASED MODEL IS BECOMING INCREASINGLY POPULAR

固定年费仍是最常使用的报酬模式，但按项目收费的模式日益受到欢迎

64% of creative agencies are remunerated by fee/retainer, down from 72.2% in 2016. For digital agencies, 49.5% use the fee/retainer model, but for BTL agencies, the project-based remuneration model prevails at 64.2%. 46.1% of media agency relationships are based on fees/retainer but with 25.1% still basing payment on a simple commission model.

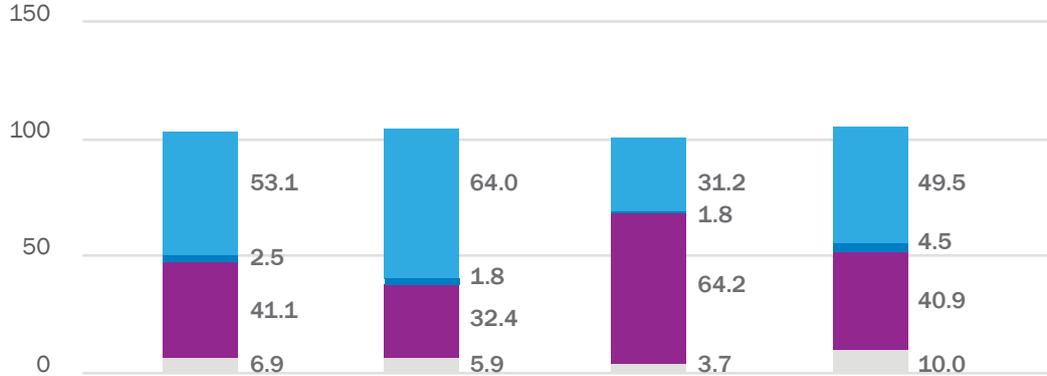
64%的创意代理商是采用固定年费的收费方式，比2016年的72.2%有显著降低。对于数字代理商而言，49.5%的市场主采用年费模式，但对于线下代理商，按项目收费的报酬模式日益普及，比重现已增至64.2%。46.1%的媒体代理商关系是以固定年费制为收费基础，但25.1%仍采用佣金模式支付报酬。

Incentive payments to agencies still lag behind other survey markets. Only 8.1% of creative agency relationships include an incentive payment, compared to 23% amongst our global benchmark. For BTL and digital agencies, an incentive element is even lower at 16.5% and 5.6% of relationships. Amongst media agencies, 10.8% of relationships contain an incentive element.

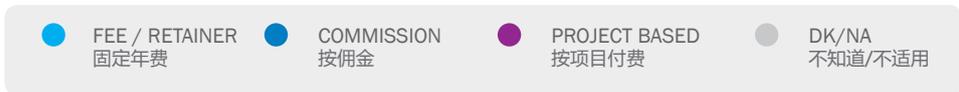
中国市场主给予代理商的奖励报酬仍然低于其他的研究市场。仅8.1%的创意代理商关系中有包含奖金制度，而全球基准是23%。线下代理商及数字代理商有奖金制的，分别为16.5%和5.6%。在媒体代理商中，10.8%的合作关系中有提供奖金制度。

CLIENT-AGENCY RELATIONSHIPS 客户与代理商关系

Remuneration Model (Fee-Commission-Project Based) 代理商酬劳方案



ONLY FEE 仅固定年费	49.5	59.9	30.3	44.4
ONLY COMMISSION 仅按照佣金	2.0	1.5	1.8	3.0
ONLY PROJECT BASED 仅按项目付费	38.0	28.7	63.3	37.4
MIXED MODELS 混合付费制度	3.6	4.1	0.9	5.0
AVERAGE FEE (RMB) 平均费用	4.41 MILLION (181 ACCOUNTS)	4.98 MILLION (108 ACCOUNTS)	4.20 MILLION (21 ACCOUNTS)	3.81 MILLION (59 ACCOUNTS)
AVERAGE % / MEDIA SPEND 平均媒体投入百分比	11.00% (13 ACCOUNTS)	10.40% (5 ACCOUNTS)	10.00% (1 ACCOUNT)	11.44% (9 ACCOUNTS)
AVERAGE PROJECT 平均项目	3.34 MILLION (136 ACCOUNTS)	4.01 MILLION (56 ACCOUNTS)	3.03 MILLION (43 ACCOUNTS)	3.08 MILLION (42 ACCOUNTS)
	COMMUNICATION AGENCIES 营销传播代理商	CREATIVE AGENCIES 创意代理商	BTL AGENCIES 线下代理商	DIGITAL AGENCIES 数字代理商





R3-SCOPEN BEST PRACTICE

R3-SCOPEN最佳实践

Fees / Retainers are increasingly the standard method of agency remuneration based on a clearly defined scope of work. Clearly defining the agency role and workload becomes critical to ensure fair and reasonable payment.

固定年费制逐渐成为代理商付费的标准方式，并以明确的工作范畴为基础。明确地界定代理商职责及工作范围，对于保证公正合理的付费非常关键。

Setting clear, measurable objectives that contribute to business growth underpin both base payment and incentives.

设定清晰、可衡量、且能帮助达成业务增长的目标，并以此作为基本费用和奖金制度的基础



10

CLIENT PROCUREMENT TEAM ARE INVOLVED IN 77.1% OF COMMUNICATION AGENCY NEGOTIATIONS AND 80.9% OF MEDIA AGENCY NEGOTIATIONS.

77.1%的营销传播代理商谈判以及80.9%的媒体代理商谈判，客户采购部皆有参与。

The procurement team is becoming increasingly involved in the agency selection process, with 77.1% of respondents stating that procurement is involved in the negotiations stage. This is well above our global benchmark of 60.6%, and the only market with a higher level of procurement involvement is the UK at 80.1%. In China, 83% of marketers asserted that procurement added value in the negotiation process of agency selection in the area of price and value for money.

采购团队越来越多地参与到代理商选择流程中，77.1%的受访者表示采购团队会参与谈判。该比重远高于60.6%的国际基准，只有英国的采购团队参与度（80.1%）高于中国的比重。在中国，83%的市场主认为采购团队的参与，能够在代理商挑选的价格性价比方面增值。

For media agencies, procurement is involved with 80.9% of negotiations. The Chinese market surpassed the UK for in this category, making it the market where procurement has the most involvement in media agency negotiations.

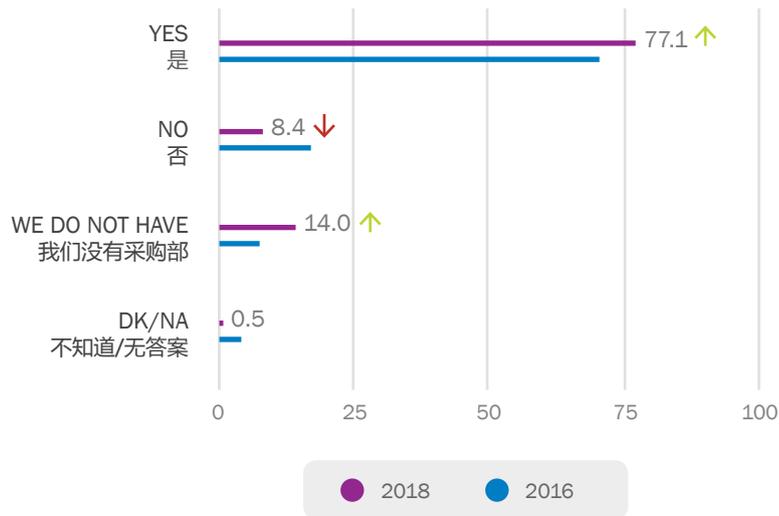
在媒体代理商方面，采购团队会参与80.9%的谈判。中国市场在这一领域超过英国，成为采购团队参与媒介代理商谈判比重最高的市场。

AGENCY SELECTION 选拔代理商

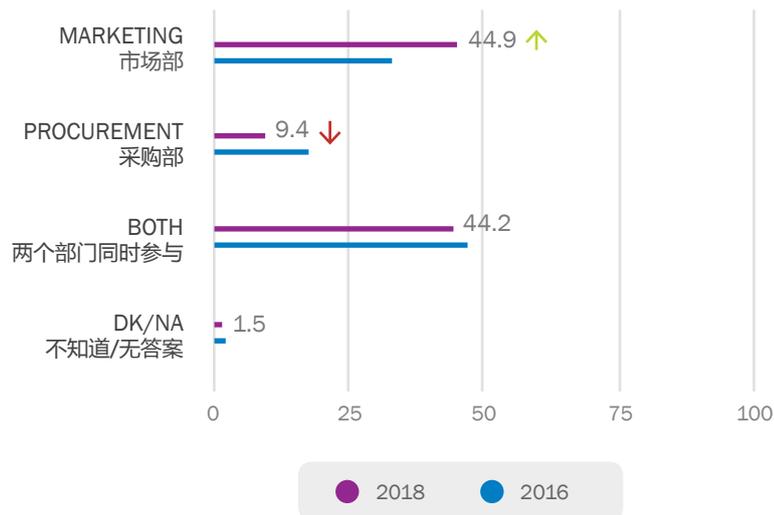


Negotiation Process (Selecting Communication Agencies) 谈判过程 (选拔营销传播代理商)

IS PROCUREMENT INVOLVED IN THE NEGOTIATION WITH AGENCIES? 您的采购部会参与代理商合作的谈判过程吗？



WHO LEADS THE NEGOTIATION PROCESS? 哪个部门会主导与代理商合作的谈判过程？

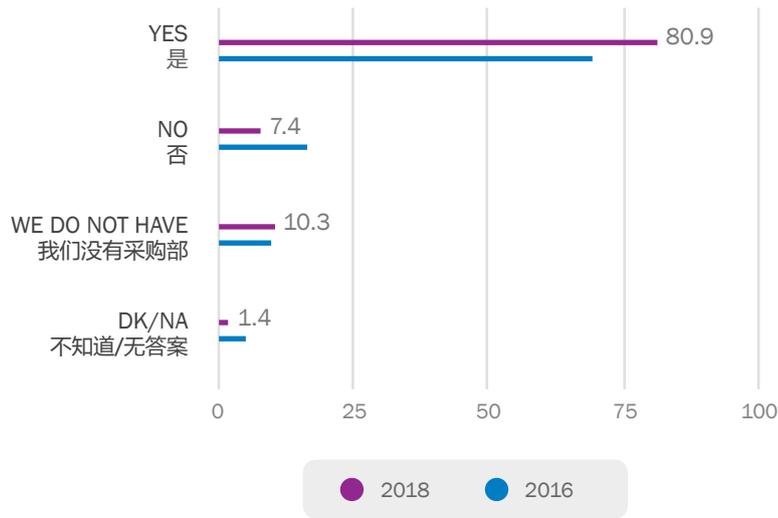


AGENCY SELECTION 选拔代理商

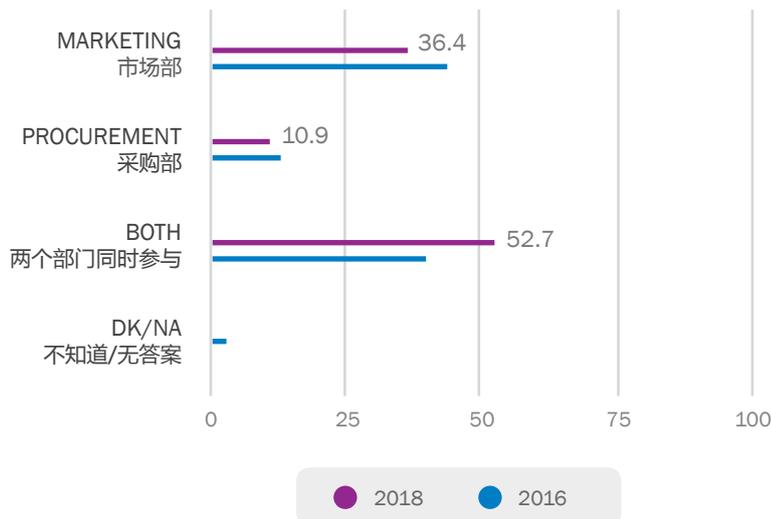


Negotiation Process (Selecting Media Agencies) 谈判过程 (选拔媒体代理商)

IS PROCUREMENT INVOLVED IN THE NEGOTIATION WITH AGENCIES? 您的采购部会参与代理商合作的谈判过程吗？



WHO LEADS THE NEGOTIATION PROCESS? 哪个部门会主导与代理商合作的谈判过程？



AGENCY SELECTION 选拔代理商

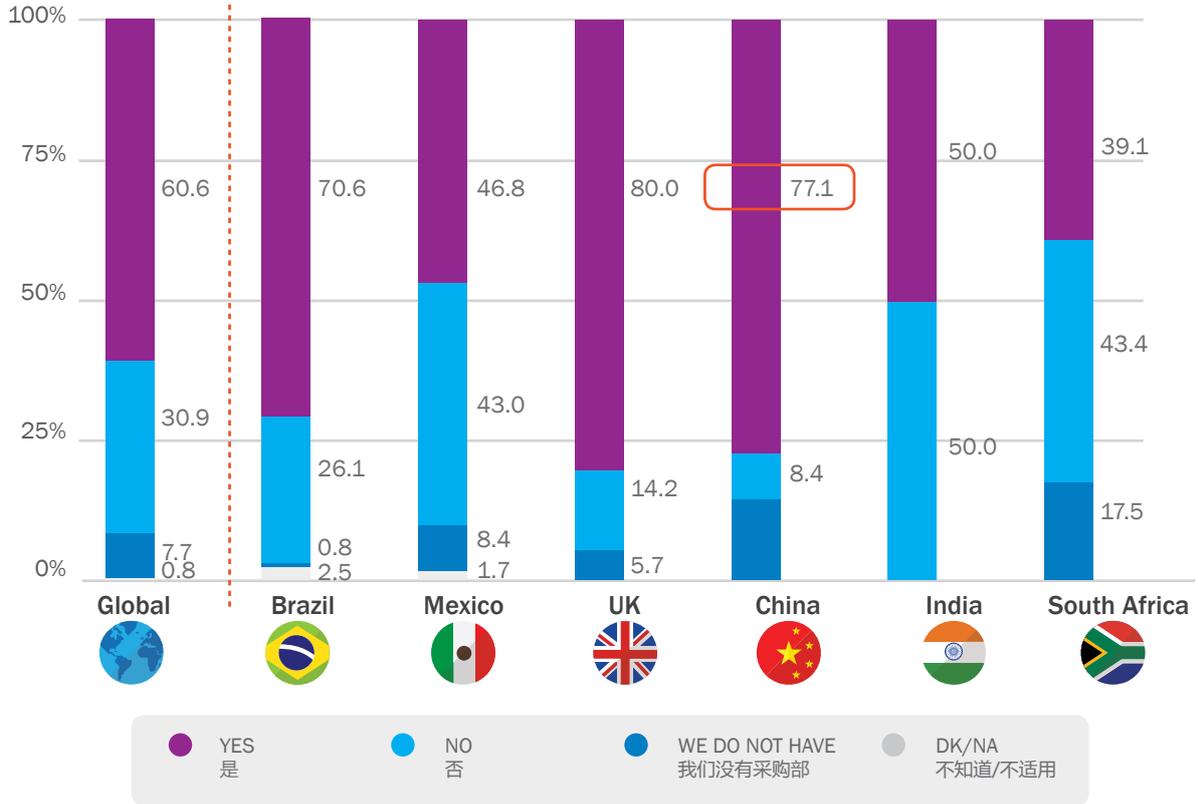


Negotiation Process (Selecting Communication Agencies)

谈判过程 (选拔营销传播代理商)

IS YOUR PROCUREMENT DEPARTMENT INVOLVED IN THE NEGOTIATION WITH AGENCIES?

您的采购部会参与代理商合作的谈判过程吗？



R3-SCOPEN BEST PRACTICE

R3-SCOPEN最佳实践

Procurement involvement in the agency selection and fees process is here to stay and meeting little or no resistance from agencies. All sides appreciate the value and transparency procurement can bring to the process.

采购部参与代理商选择及服务费用商定的过程，这种现象将长期存在，并被大多数的代理商接受。各方都赞许采购部在这一过程中对价格及透明度所做的贡献。

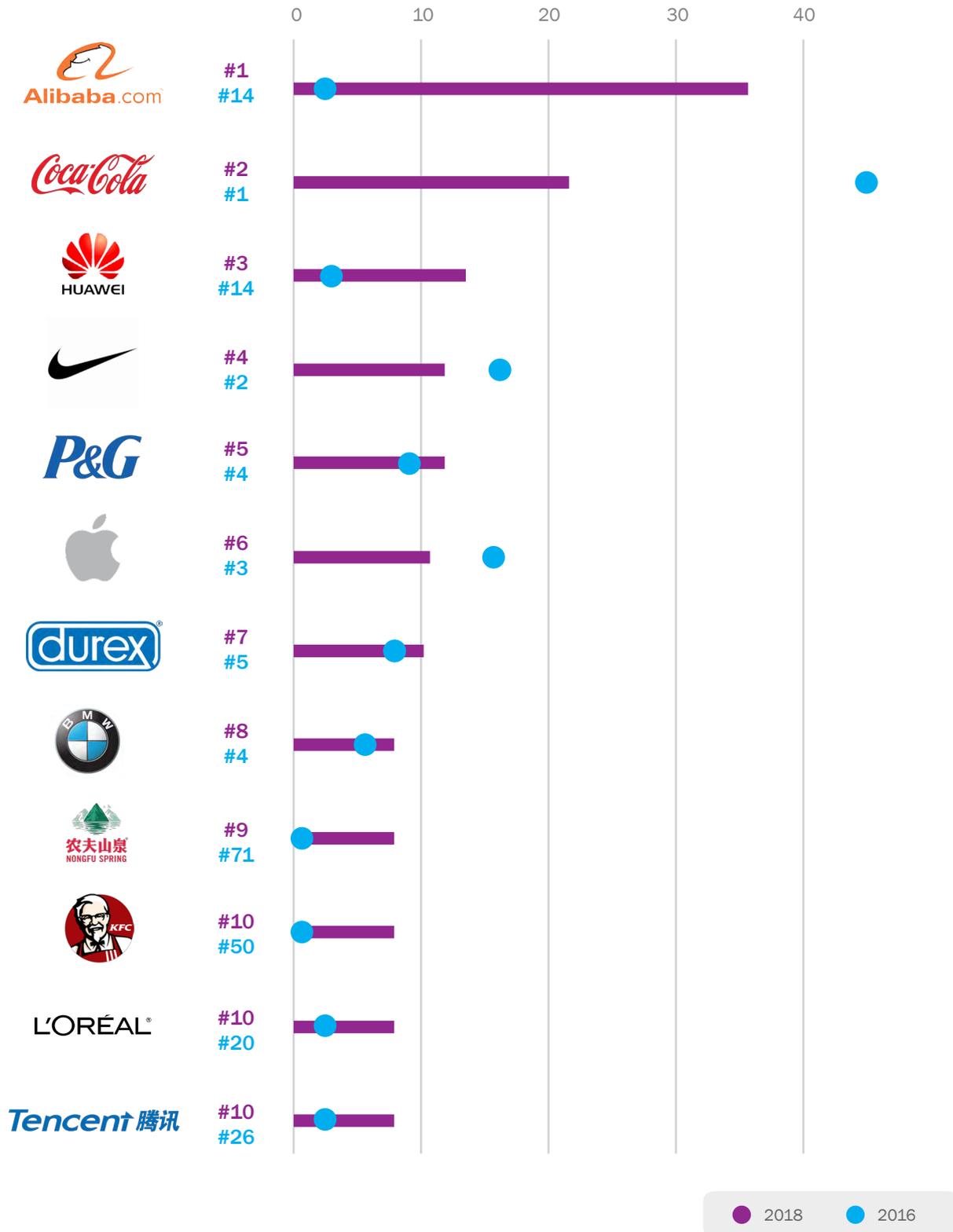
Keep procurement involved throughout the process, as they will probably get an equal vote in the final decision making.

让采购部参与整个流程，他们很可能在最终决策时拥有平等的表决权。

AGENCIES COMMUNICATION & PR 代理商传播渠道及公关方式

Most respected Companies (for their Marketing)

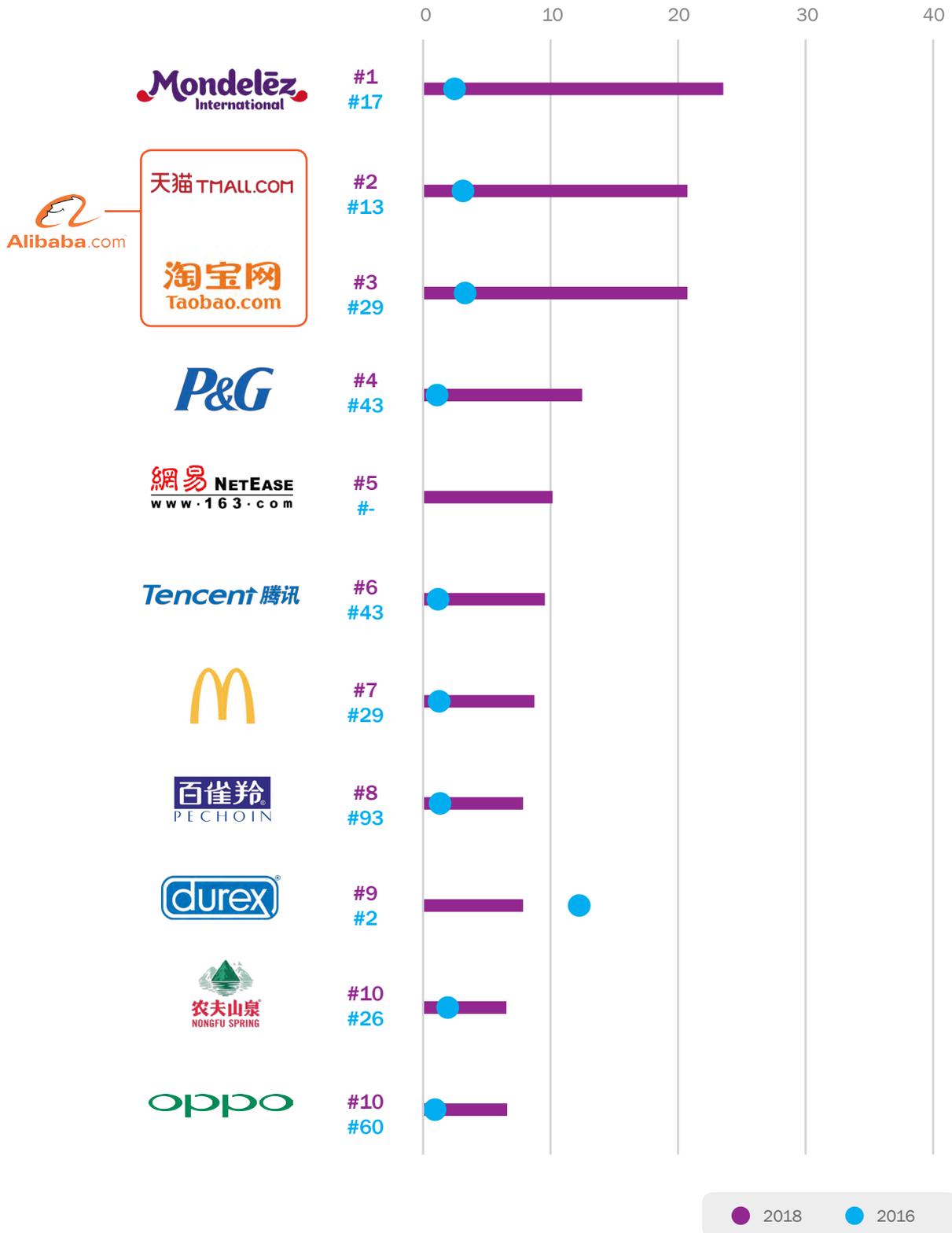
最受推崇的公司品牌 (市场营销表现)



AGENCIES COMMUNICATION & PR 代理商传播渠道及公关方式

Best Creative Campaigns (of the last 2 years) – Top 10

最佳营销活动 (过去两年中, 前10名)





ABOUT R3

OUR REASON FOR BEING

In a word, we are about performance. R3 (www.rthree.com) was set up in 2002 in response to an increasing need from marketers to enhance their return on marketing, media and agency investments, and to improve efficiency and effectiveness.

We act as coach to marketers wanting to play better.

OUR BACKGROUND

We've worked with more than one hundred companies on global, regional and local assignments to drive efficiency and effectiveness.

We have talent based in US, Asia Pacific and Europe and partners in LATAM and Africa.

Through global work for Samsung, Coca-Cola, JNJ, Visa, Unilever and others, we have developed robust benchmarks and process targets for more than 70 countries.

WHAT WE DO

Our core service offerings include proprietary processes and tools in the areas of marketing investment and agency relations.

HOW WE DO IT

We invest in the best talent, bringing in senior leaders from marketing, agency and analytic backgrounds.

Since 2002, we've interviewed more than 2,000 marketers about their agency relations.

Since 2006, we've spoken to more than 80,000 consumers in China's top twenty cities and continue to do so every three months.

Each month we exclusively track over 500 agency new business wins.

We authored the book "China CMO" about marketers in the world's most dynamic country. We maintain an ongoing database of media costs for key markets.

We have co-developed software to measure agency and media performance.



IMPROVING THE
EFFECTIVENESS
& EFFICIENCY OF
MARKETERS
& THEIR AGENCIES

RETURN ON AGENCIES

We help marketers find, pay and keep the best possible agency relationships – covering Creative, Media, PR, Digital, Social, Performance, Event, Promotions and CRM.

We take the lead on improving the Integration process through proprietary software and consulting.

RETURN ON MEDIA

We offer professional analysis of the media process, planning and buying with proprietary benchmarks and tools to set and measure performance.

We conduct financial audits to validate and benchmark transparency.

RETURN ON INVESTMENT

We review marketing data, structure and processes to help benchmark and drive improvement.

We track Digital Engagement in China through a proprietary study in China called EnSpire.

胜三成立的理由

一言概之,我们专注于提高业绩表现。胜三管理咨询公司 (www.rthree.com) 成立于 2002 年,成立的目的是为满足广告主对于提升广告宣传投资回报率及改进营销效率和有效性的日益扩大的需求。

我们正如一位教练,帮助广告主提高营销效果。

胜三的背景

成立至今,我们为全球、亚太及本地市场的 100 多家公司提供了多方面的服务,帮助他们提高市场营销的效率和有效性。

我们拥有来自北美、亚太、欧洲和拉丁美洲的优秀人才,以及非洲的合作伙伴。通过与三星、可口可乐、强生、VISA、联合利华等客户在全球范围内的合作我们积累了超过 70 个国家可靠的衡量基准数据以及工作流程,以帮助跨国客户更好地应对来自全球市场的挑战。

胜三的业务范畴

我们的核心业务是向广告主提供营销投资和代理商管理领域的专有分析方法及工具。

胜三的工作方法

我们崇尚最优秀的人才,从市场营销、代理商和分析行业引进资深领导者。

从 2002 年起,我们访问了 2,000 多位广告主以了解他们的代理商合作关系。

从 2006 年起,我们访问了中国二十多个城市,80,000 多位消费者,并持续进每三月进行一次调研。

每个月,我们独立追踪超过 500 项代理商新业务。我们还联合创作了《China CMO》一书,介绍这个最具活力的国家的市场主们。我们建立并持续更新关键市场现行媒体费用的数据库。我们还开发了衡量代理公司及其媒体业绩表现的专利软件。

提高营销效率和有效性

代理商关系管理

得益于胜三多年来对代理商不断的深入了解和研究,我们运用一系列专业研究工具为市场主提供代理商甄选、报酬管理及效率评估等独立咨询服务——涵盖创意、媒介、互动、公关、社交媒体、线下活动以及客户关系管理等营销领域的每一个环节。

媒介效率审计

借助于胜三庞大的媒体价格及媒介返点数据库,我们提供独立的媒介审计和财务审计服务,并致力于帮助市场主改进媒介流程。

投资效果评估

通过胜三专有的研究工具(如 EnSpire ——中国消费者品牌参与度与渴求度研究),我们提供最佳的衡量基准来评估营销程序及结构,并为如何降低营销投资风险提供独立的咨询服务。

ABOUT SCOPEN 关于SCOPEN

SCOPEN

SCOPEN was founded in 1990 and is a leading consulting firm in the field of Commercial Communications with offices in 12 countries. We work with marketers, agencies and media owners, helping them to improve and create added value within their relationships. AGENCY SCOPE has been running in Europe for 40 years and since 2005 in China.

SCOPEN创立于1990年，是商业传播领域领先的咨询公司，办事处遍布全球12个国家和地区。SCOPEN与市场主、代理商和媒体业主合作，帮助他们改善关系，创造附加价值。营销趋势研究在欧洲已有40年的历史，2005年进入中国市场。



CONTACT US

Greg Paull 包贵革

Principal and Co-Founder
总裁兼联合创始人
greg@rthree.com

Goh Shu Fen 吴淑芬

Principal and Co-Founder
总裁兼联合创始人
shufen@rthree.com

Asia Pacific 亚太

Beijing 北京

A 1801, Chaowai SOHO, No.6 B Chaowai Street, Chaoyang District, Beijing 100020, China
北京市朝阳区朝外大街乙6号 朝外SOHO A座1801室
T 电话 +8610 5900 4733
F 传真 +8610 5900 4732

Shanghai 上海

Room 4203, United Plaza, 1468 Nan Jing Road West, Shanghai, 200040, China
上海市静安区南京西路1468号中欣大厦4203室
T 电话 +8621 6212 2310
F 传真 +8621 6212 2327

Hong Kong 香港

23/F, One Island East 18 Westlands Road HongKong.
T 电话 +852 3750 7980

Singapore 新加坡

69A Tras Street, Singapore 079008
T 电话 +65 6221 1245
F 传真 +65 6221 1120

Ho Chi Minh City 胡志明市

8th Floor, 135A Pasteur, Ward 6, District 3, Ho Chi Minh City, Vietnam
T 电话 +84 6290 3336

North America 北美

New York 纽约

4th floor 57 W 57th Street New York, NY 10019 U.S.A
T 电话 +1 646 416 8088

Latin America 拉美

São Paulo 圣保罗

Rua Jerônimo da Veiga, 428 - conjunto 21, São Paulo, Brazil
T 电话 +55 11 3071 0678

Europe 欧洲

London 伦敦

No.3 Waterhouse Square, 138 Holborn EC1N 2SW
T 电话 +44 20 7998 9588

Social Media

 www.rthree.com
Website

 weibo.com/r3china
Weibo

 twitter.com/R3WW
Twitter

 facebook.com/r3worldwide
Facebook

 linkedin.com/company/r3
LinkedIn



SCOPEN

Cesar Vacchiano

President & CEO
总裁兼首席执行官
cvacchiano@scopen.com

Madrid

Velazquez 24, 28001,
Madrid, Spain
T 电话 +34 917 021 113

 www.scopen.com



WORLDWIDE

www.rthree.com