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# CHINA PR AGENCY SCOPE

中国公关行业  
营销趋势研究

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2017

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## PREFACE 前言

China PR Agency Scope 2017 is the fourth wave in an ongoing study to garner a deeper understanding of the motivations and processes for Public Relations in China. The data are compiled through a series of interviews with marketers who are the decision makers of some of the largest companies in China. This study is a tool for taking action, providing an analysis of trends in the ever-changing world of PR agency-client relationships, as well as a deeper understanding of agency perception amongst both current and prospective clients.

《2017中国公关行业营销趋势研究》是胜三一项长期研究的第四期报告，此项研究旨在深入了解中国公关行业的洞察和发展。其中的数据来源于胜三对一些资深市场主的采访，这些市场主都是中国市场领先品牌的公关决策者。本研究为市场主的公关传播决策提供了依据和参考，对不断变化的“公关代理商与市场主”关系进行了分析，深入地剖析了现有市场主和潜在市场主对代理商的认知。

We want to thank the participants for committing their time to making this the most ambitious and comprehensive PR study in the world. We believe that reports such as these help to bolster the transparency and professionalism of marketing and public relations in China, and we aim to continue to be global experts in improving marketing efficiency and effectiveness through continual studies like this one.

我们对投入时间参与此项综合性研究的所有受访者表示感谢。我们相信此类报告有助于改善中国营销和公关行业的透明度及专业度，并且我们希望通过不断开展类似研究，继续成为协助市场主提升营销效率的全球专家。

# EXECUTIVE SUMMARY 执行总结

## AN OVERVIEW OF KEY MARKETER-PR AGENCY TRENDS 市场主与代理商关系趋势性概览

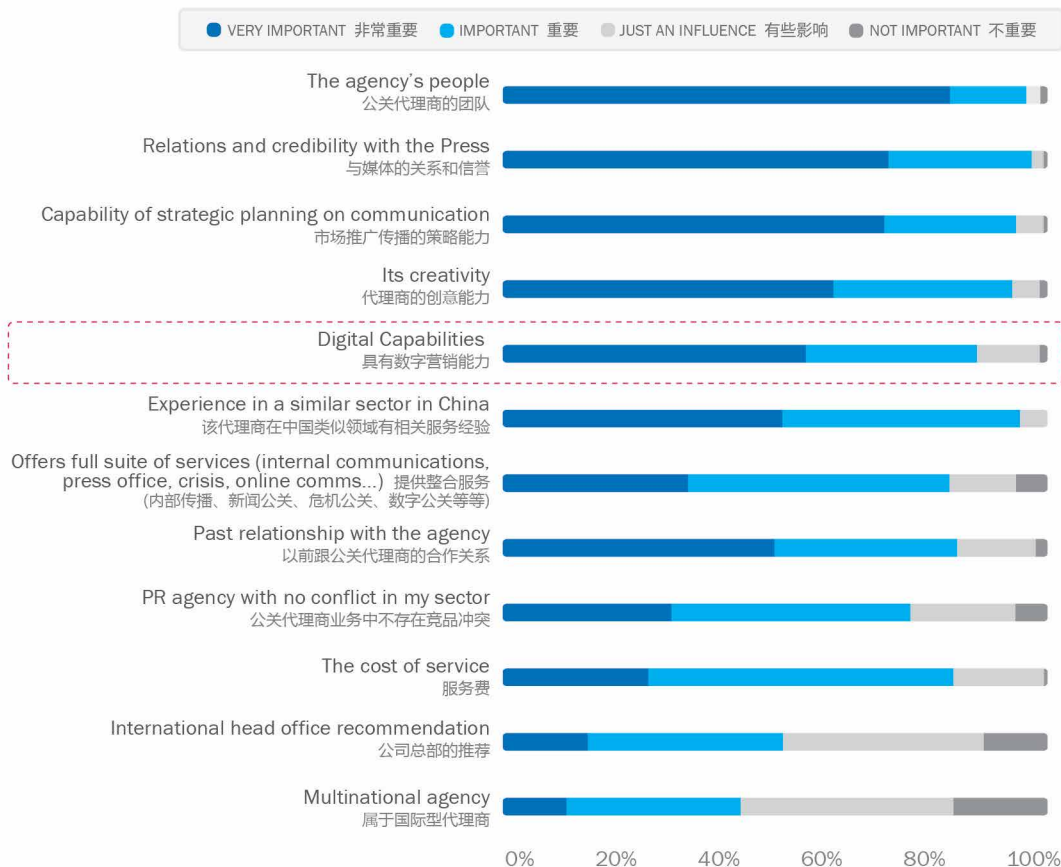


### CHINESE MARKETERS DEMAND DIGITAL CAPABILITIES FROM PR AGENCIES. 中国市场主需要拥有数字公关能力的公关代理商。

The “digital transformation” spreading throughout the marketing world has now made its way to the relationships between marketers and their PR agencies in China. In our 2015 study, we asserted that the “future of PR will likely be digitally-centric,” and that is turning out to be a true prediction. This is the fourth wave of the study, but the first one to reveal such dramatic outcomes in the area of digital capabilities. 59% of marketers now rate ‘digital capabilities’ as a very important factor when selecting a PR agency, up a staggering 55.5% from just 3.5% in the 2015 wave of the study. This indicates that the massive shift in the marketing and advertising world has not passed over the PR discipline.

如今，“数字化转型”渗透至营销界的每一个环节，公关行业也不例外。我们在2015年的研究中预测未来的公关行业可能会以数字为中心，现已成为事实。在此次第四轮的公关行业研究中，数字能力受到了前所未有的关注。而在上一轮研究中，营销和广告在数字化转型上的巨大转变尚未在公关行业中体现。如今，59%的市场主已将公关代理商的数字能力视作重要的考虑因素之一，相较于上一轮（2015年）研究中的3.5%，这个比例增长了55.5%。

### PR AGENCY SELECTION CRITERIA 公关代理商选拔标准



IMPROVING THE EFFECTIVENESS  
& EFFICIENCY OF MARKETERS  
& THEIR AGENCIES

In addition, the study revealed that the top two biggest changes in the PR industry were “focusing more on digital/social communications,” and the “transition from traditional PR to digital PR,” according to the survey respondents. Despite this obvious industry-wide shift to digital, 43% of marketers still believe that the best approach is to work with separate PR and digital agencies to benefit for the core competencies of each, while 62.6% of marketers think that PR agencies should be focused on increasing their digital capabilities going forward.

此外，研究指出了当前公关行业正在发生的两大转变：1. 市场主比起以往任何时候都更加关注数字/社交传播；2. 相对于公关代理商而言：传统的公关传播正向数字公关转变。虽然整个行业都在经历“数字化”运动，43%的市场主依然认为分别与数字代理商和公关代理商合作能够发挥各自领域中的优势。而62.6%的市场主建议公关代理商当务之急是要加强自身的数字服务能力。



## DIGITALIZATION BRINGS NEW CHALLENGES.

### 信息数字化带来了新的挑战。

According to the marketers who participated in the study, the digitization of all information has significantly changed the relationships between brands and their target audience. The diffusion of brand information has accelerated, and business and communication strategies have had to be altered to keep up. 20% of marketers agreed that one negative impact of digitization on PR has been the challenge of controlling crisis communications, while 14% assert that it is harder to evaluate the effectiveness of brand promotions when everything is in real-time.

参与研究的市场主表示，信息数字化改变了品牌与目标受众之间的关系，品牌信息的传播速度加快，因而传播策略必须适应改变的节奏。与此同时，信息数字化也给公关行业带来了一些负面影响。20%的市场主认为危机管理的难度加大。14%的受访者则认为，一切信息都是实时的，因此很难评估传播的有效性。



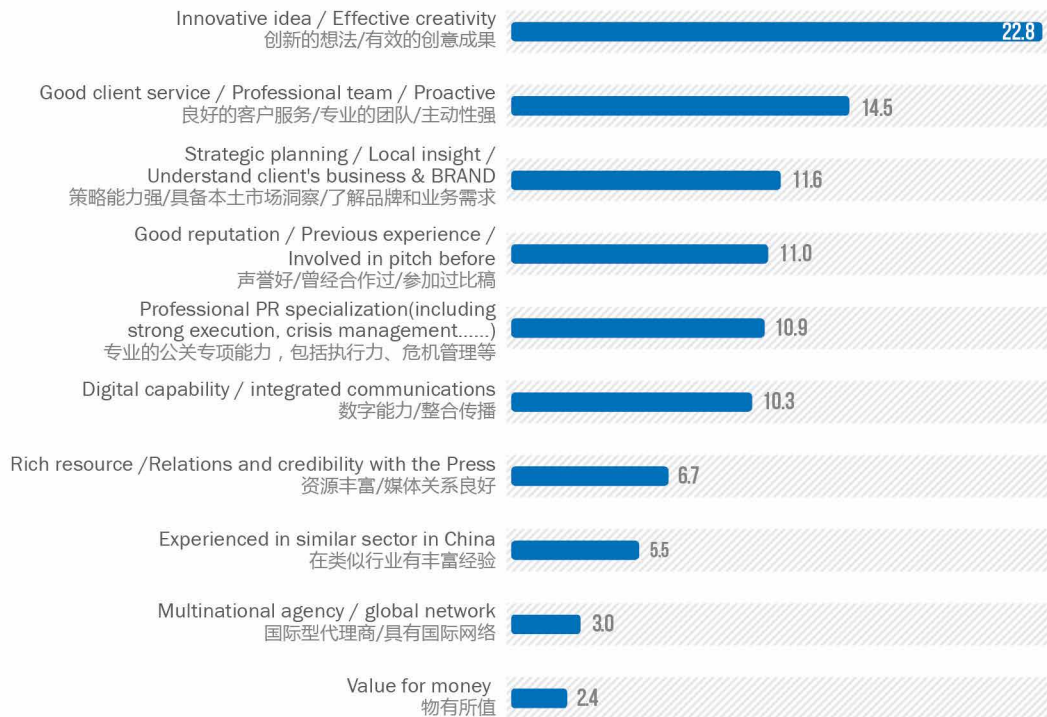
## CREATIVITY REMAINS AN IMPORTANT FACTOR.

### 创新的想法依然重要。

In this wave of the study, creativity remained a key factor for marketers when shortlisting agencies during the pitch process. 22% of marketers selected ‘innovative ideas and effective creative’ as very important in agency selection, indicating that marketers believe that the more advanced a PR agency is in breakthrough creativity and providing the right content to the target audience, the more competitive they are during the agency selection. The study also found that while 72% of marketers are satisfied with their current PR agency, 33% would consider a pitch, citing a lack of creativity as their main reason.

创新的想法依然是市场主在考虑代理商进入比稿流程时的关键因素。22%的市场主认为，新颖的创意及有效的创意成果在甄选代理商时十分重要。他们相信，具备突破性的想法并且有能力提供正确内容的代理商将在甄选中更具竞争力。研究中还发现，虽然72%的市场主表示满意其正在合作的现任代理商，但由于缺乏独特的创意，33.2%的市场主仍会考虑进行比稿。

## CRITERIA USED TO CREATE A SHORT LIST OF PR AGENCIES 选拔公关代理商名单的标准



CLIENT-AGENCY RELATIONSHIPS 2017: 232. DATA IN %.



### INDUSTRY TREND: LINKING SOCIAL AND SALES.

#### 行业趋势：社交媒体正在承担更多的销售职责。

In our 2015 wave of the study, just 35% of survey respondents claimed to use social as a tool to drive sales promotions. In the most recent study, that number jumped up to 47% as the industry has seen the importance of linking social and e-commerce increase dramatically in the last two years. Some of the more “traditional” roles of social still remain important, such as generating buzz and enhancing brand awareness; however, the role of social is likely to diversify even more in the next wave, becoming an integrated part of linking marketing to actual business results.

在2015年的研究中，仅有35%的受访者表明将社交媒体视作一种促进销售的渠道，最新的研究表明，市场主已然看到了社交媒体与电商等销售渠道之间产生关联的重要性。在过去的两年中，社交媒体依旧扮演着一些较为“传统”的角色，如增加曝光度、提升品牌知名度。然而，社交媒体的角色转变可能在下一轮研究中变得更加多元化，进一步整合市场营销与业务表现。

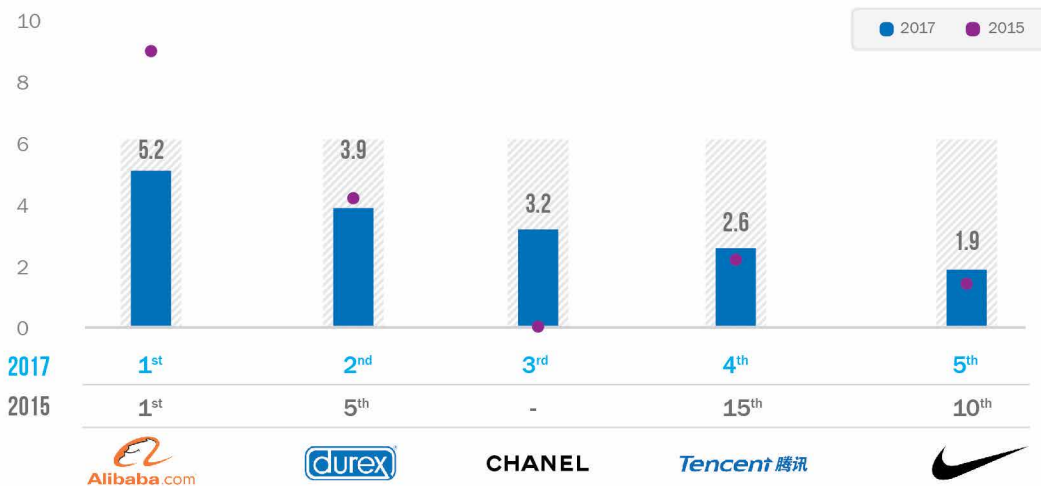


## ALIBABA, DUREX LEAD AMONG MARKETERS. 阿里巴巴、杜蕾斯领先群雄。

When asked to name the best peer marketer for their Public Relations approach in China, the two most mentioned companies were tech giant Alibaba, followed by Durex, who moved up from 5th place in the 2015 study. Other leaders in this category included Chanel, Tencent and Nike.

当受访者被问及中国公关传播表现最佳的品牌时，提及最多的是科技巨头阿里巴巴。其次是杜蕾斯，排名由2015年的第五名跃升至第二位。其他在该方面领先的品牌包括香奈儿、腾讯和耐克等。

### MOST RESPECTED BRANDS 最受欢迎的品牌



CLIENT-AGENCY RELATIONSHIPS 2015: 215 AND 2017: 232. DATA IN %

Average of mentions: 0.48

# EXTENDED SUMMARY AND BEST PRACTICE

## 要点延展和最佳实践

# 1

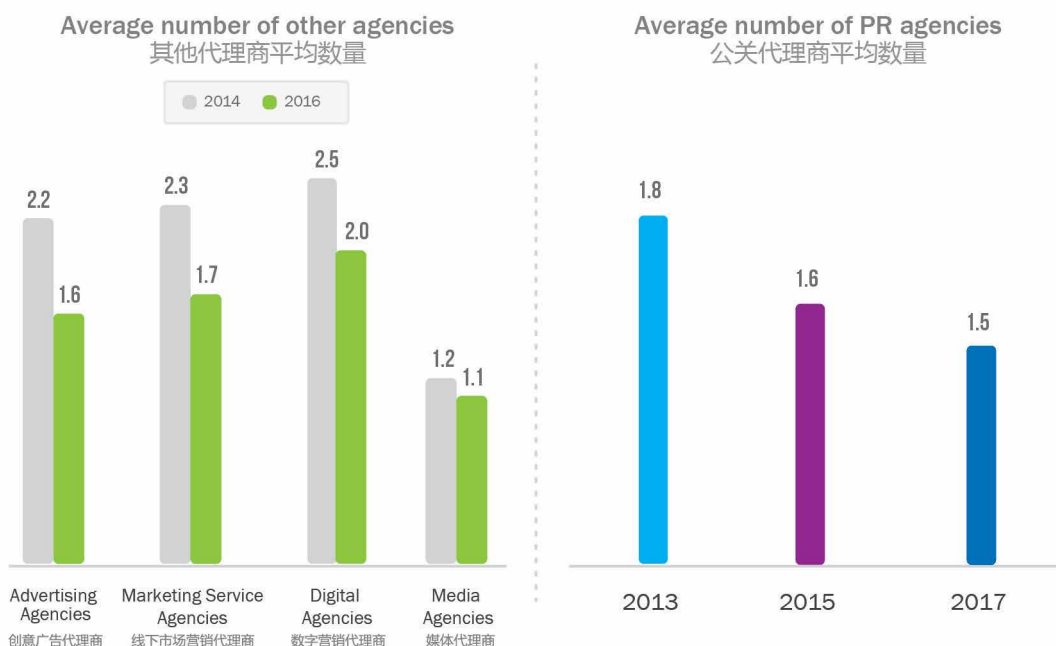
### MARKETERS HAVE ON-GOING RELATIONSHIPS WITH AN AVERAGE OF 1.5 PR AGENCY PARTNERS, DOWN FROM 1.6 AGENCIES IN 2015.

市场主的现任公关代理商关系平均数量为1.5个，与2015年的1.6个相比略有减少。

According to the study, marketers are gradually working with fewer PR agencies. This finding aligns with the overall market trend of moving towards greater integration. Marketers in China now work with an average of 1.6 advertising agencies, 1.7 marketing service agencies, 2 digital agencies and 1 media agency.

研究中，我们发现市场主的现任公关代理商关系数量逐年下降，与整体市场朝向整合型的合作模式发展趋势相符，客户与代理商关系愈发紧密。目前，市场主平均与1.6家创意广告代理商、1.7家线下/市场营销服务代理商、2家数字营销代理商和1家媒体代理商进行合作。

#### NUMBER OF AGENCIES 合作中代理商的数量



CLIENT-AGENCY RELATIONSHIPS 2013: 212, 2015: 215, AND 2017: 232. DATA IN % AND AVERAGE.

## 2

## WHILE OTHER TYPES OF AGENCIES ARE APPOINTED FOR LONGER PERIODS OF TIME, PR AGENCIES' AVERAGE RELATIONSHIP LENGTH DECREASED FROM 2.9 YEARS IN 2015 TO 2.5 YEARS IN 2017.

当市场主与不同类型的代理商合作时间不断增加的同时，对公关代理商的委任时间却在缩短，从2015年的2.9年变为现在的2.5年。

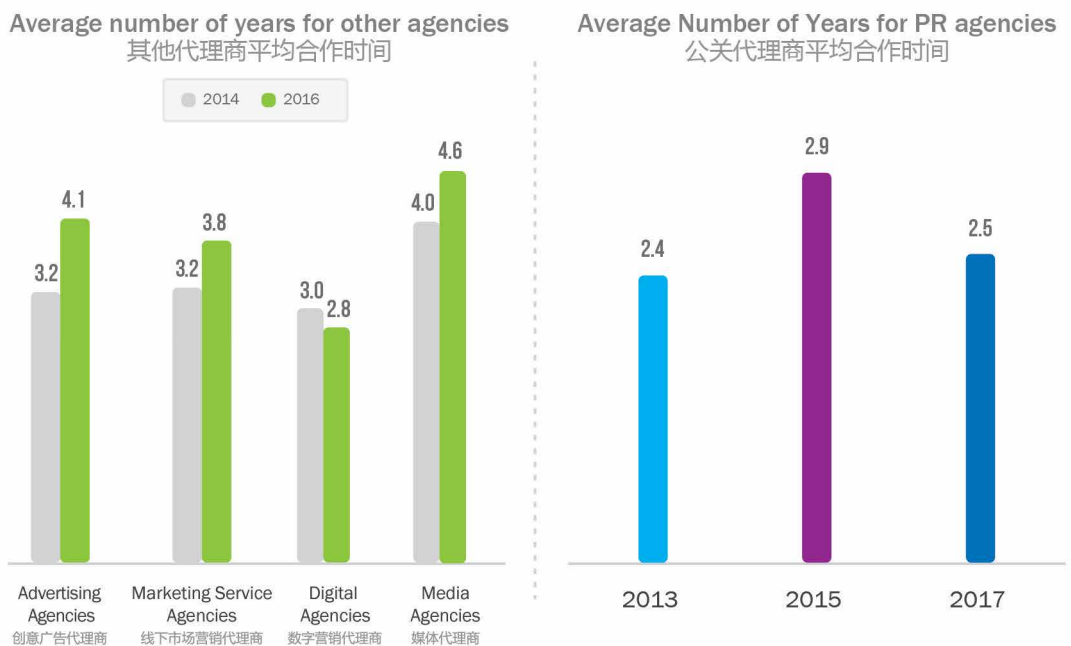
While other types of agencies' (creative, marketing service and media) working periods have grown to an average of 3.8 years, the length of PR agency relationships has decreased to 2.5 years, compared to 2.9 years in 2015. This is seemingly a reversal of the trend between the 2013 and 2015 waves, which saw the relationship length increase to 2.9 years from 2.4. This year's decrease doesn't necessarily mean that client-PR agency relationships are destabilizing, but rather that the rapidity of digital transformation in the past two years has significantly altered both the role that PR plays within an organization, and how organizations work with their PR agencies.

Digital transformation has impacted the connection between brands and their target audience. As such, marketers acknowledge that they value agencies with more breakthrough creative thinking and consumer-oriented content, which may or may not be coming from their PR agencies anymore.

相较于其他类型的代理商（创意，线下市场服务及媒体）的合作时长由2014年的平均3.35年提升为2016年的平均3.8年，公关代理商的平均合作时间由2015年的2.9年降到现在的2.5年。

数字营销逐步占据传播领域的主导地位，改变了市场主与公关代理商的合作关系。市场主期待代理商提出更多新颖的营销模式及以消费者为核心的品牌沟通内容，或将不再局限于公关代理商的服务范畴。

### LENGTH OF THE RELATIONSHIP 代理商合作时间



CLIENT-AGENCY RELATIONSHIPS 2013: 212, 2015: 215, AND 2017: 232. DATA IN % AND AVERAGE.





### BEST PRACTICE 最佳实践：

USE CLIENT-AGENCY EVALUATION TOOLS TO HELP IMPROVE AND STRENGTHEN PARTNERSHIPS.

运用客户与代理商关系评价工具来帮助双方改进和加强合作关系。

Shorter marketer-agency working relationships definitely make building those relationships and strong teams a challenge. There exists a simple formula: client satisfaction = agency performance/ expectation. When unrealistic expectations are set from the start, it comes as no surprise that client satisfaction fails to reflect the true performance of the agency. It is nearly always the expectation piece that is neglected during agency performance assessments. To avoid breakdowns and dissatisfaction issues, having a clear channel to communicate expectations between client and agency is necessary.

Industry best practice shows that having an evaluation tool to continuously monitor the client-agency working relationship and health improves both the strength of the relationship and the longevity of the partnership.

市场主与代理商平均合作时长缩短，导致代理商在维系稳定的合作关系和强大的服务团队问题上都遭遇巨大的挑战。一般而言，市场主对代理商的满意度与代理商的表现成正比，与其对代理商的期待往往不成正比。当市场主对代理商抱有不合理的期待时，其满意度反馈则难以客观反映代理商的实际表现。然而，这部分期待在市场主评价代理商表现时往往被其忽略。如果客户和代理商之间一直保持良好的互信和理解，就能避免很多客户的不满甚至是合作中断。

业内最佳实践证明，通过运用客户与代理商关系评价工具，持续地对客户与代理商之间的合作关系以及健康度进行监控，能够使代理商适时地调整工作细节、加强双方的合作关系、延长合作时间。

## 3

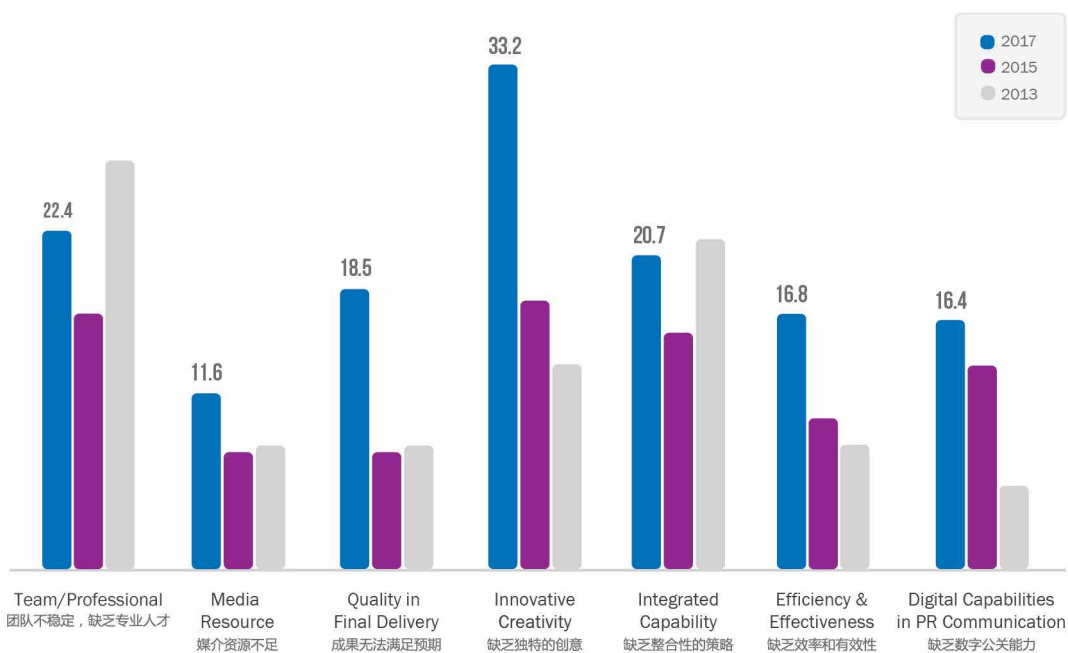
### MOST MARKETERS ARE BROADLY SATISFIED WITH THEIR CURRENT PR AGENCIES PARTNERS, BUT 33.2% ARE CONSIDERING A PITCH IN THE NEAR FUTURE DUE TO THEIR PR AGENCIES LACK OF INNOVATIVE CREATIVITY.

大多数市场主较满意正在合作中的公关代理商，但对于缺乏独特创意的代理商，部分市场主考虑在不久的将来进行比稿。

72.8% of marketers are currently happy with their PR agency relationship, yet due to a lack of innovative creativity, 33.2% of marketers would still consider a pitch in the near future. Other factors influencing marketers to pitch are an unstable team and lack of professionalism (22.4%), decreased quality in final delivery (18.5), lack of efficiency & effectiveness (16.8%), lack of digital capabilities in PR communication (16.4%), and a lack of media resources (11.6%).

72.8%的市场主表示对于正在合作中的公关代理商感到满意。但由于缺乏独特的创意思法，33.2%的市场主仍会考虑进行比稿。其他更换当前公关营销代理商的因素包括：团队不稳定且缺乏专业人才（22.4%）、最终成果无法满足预期（18.5%）、缺乏效率和有效性（16.8%）、缺乏数字公关能力（16.4%）和媒介资源不足（11.6%）。

## REASONS FOR CHANGING CURRENT PR AGENCIES 更换现任公关代理商的原因



CLIENT-AGENCY RELATIONSHIPS 2013: 212, 2015: 215, AND 2017: 232. DATA IN % AND AVERAGE.

## 4

## GOOD CLIENT SERVICE AND BREAKTHROUGH THINKING / CREATIVITY ARE AT THE TOP OF THE LIST FOR MARKETERS' "IDEAL" AGENCY.

市场主眼中的理想代理商应该具备两大属性：良好的客户服务，突破性想法/创意。

Regarding marketers' agency selection criteria, good client service and breakthrough thinking / creativity top the list of key attributes marketers want in their ideal PR agency. Compared with 2015, marketers added the expectation of a stable service team, while strong strategic capability and good media relations maintained their importance. One interesting thing to note: although strong EPR/digital capability doesn't appear to be on top of the list for an ideal PR agency, it doesn't mean it's less important. Rather, it reflects that marketers might currently be considering other types of agencies to fill their digital communication needs.

在挑选理想代理商时，市场主优先重视的是令人满意的专业服务，以及具有创新想法与创意能力。

与2015年相比，市场主新增加了对于代理商保持团队稳定的需求。同时市场主仍旧希望看到公关代理商表现出较强的策略制定能力，以及与媒体保持良好的关系。数字公关能力虽不是首要标准，但仍旧是重要因素，这侧面反映了，市场主可能倾向于与其他类型的代理商合作以解决数字营销方面的需求。



**BEST PRACTICE 最佳实践：**  
**INVEST IN THE RELATIONSHIP**  
 促进改善客户关系

The effort involved in choosing an agency is relatively small compared to the effort required by both marketer and agency team to nurture a long-lasting and successful partnership. Key to a successful client-agency relationship is clearly establishing aligned and realistic goals and developing transparent and fair metrics on how these are measured.

In addition to the establishment of “evaluation tools” to monitor the health of the agency relationship, another useful tool to foster a productive working relationship is to establish clear and agreed protocols on behavior and decision making, which are monitored regularly to ensure continuous improvement.

选择一个优秀的公关代理商仅仅是实现市场营销目标的第一步，更多的工作是需要与市场主和公关代理商长期的共同协作中完成。融洽的市场主与代理商关系使得繁杂的日常工作得以顺利开展。而建立成功的客户关系最关键的是要梳理清楚任务目标、工作进程，并和客户建立透明、公平的衡量指标进行监测。

除了通过评估工具来监控代理商和市场主的关系，另一个建立健康工作关系的方法是建立明确和双方一致的行为准则，规范并定期检测双方的行为和决策制定。

**5**

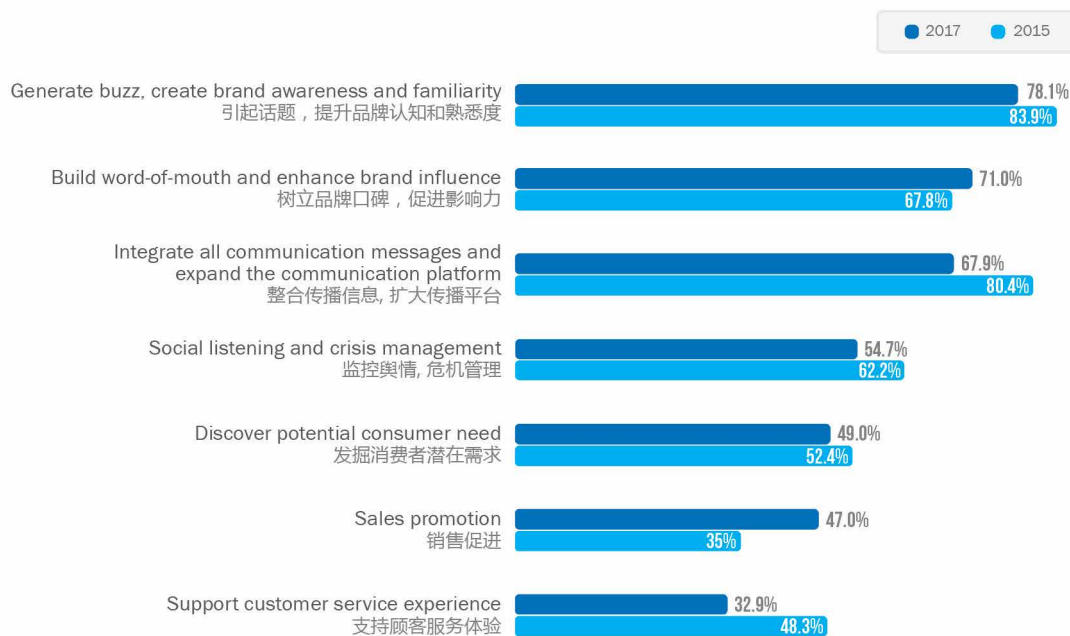
**THE ROLE OF SOCIAL MEDIA IN PR COMMUNICATION HAS PLAYED A STRATEGIC AND IMPORTANT ROLE TO FURTHER STIMULATE BRANDS' ROI.**

社交媒体在公关传播中正在扮演着策略性的重要角色，并影响着品牌的投入产出。

Given the fact that the majority of marketers have realized the importance of social media, that raised the question of how will it evolve in the future. It still fulfills the basic needs of generating buzz, creating brand awareness (78.1%), building WOM and enhancing brand influence (71%), and also integrates all communication messages, expands the communication platform (67.9%), social listening and crisis management (54.7%), and discovers potential consumer needs (49%). As mentioned previously in the report, 47% of marketers already have higher expectations on how social media can help improve sales. Compared with the 2015 study, there is less focus on supporting the customer service experience.

当社交媒体已然转变其职能时，我们需要关注的是其未来走向。除了对社交媒体的基本需求，如：引起话题并提升品牌认知和熟悉度、树立品牌口碑并提升影响力、整合传播信息以扩大传播平台、监控舆情及危机管理、发掘消费者潜在需求等，越来越多的市场主开始着眼于如何通过社交媒体来促进销售增长。反之，市场主对于社交媒体支持顾客服务体验的期待则有所减少。

## THE ROLE OF YOUR SOCIAL MEDIA IN PR COMMUNICATIONS 社交媒体在公关传播中的职能



CLIENT-AGENCY RELATIONSHIPS 2015: 215 2017: 232. DATA IN %

## 6

### 65.2% OF MARKETERS SET UP KPIS FOR THEIR PR AGENCIES, WITH DIGITALLY-RELATED KPIS SIGNIFICANTLY INCREASED.

多达65.2%的市场主会对公关代理商设定考核指标，与数字相关的考核指标显著上升。

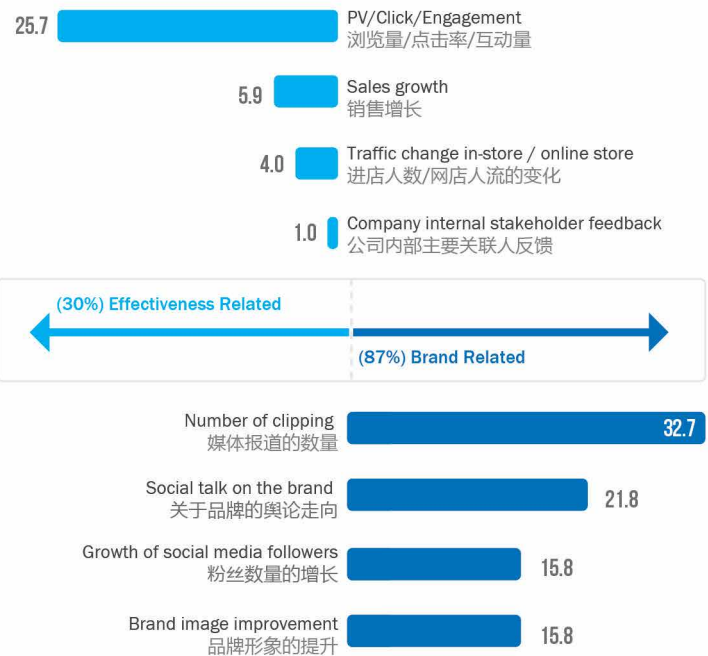
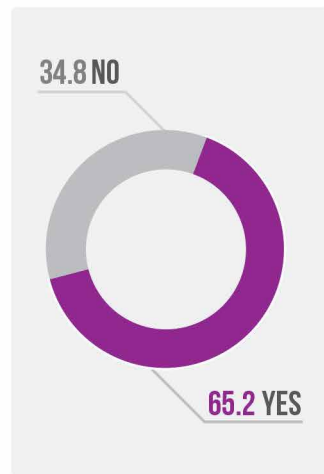
As has been done previously, marketers set up KPIs for their PR agencies, they tend to use brand-related KPIs to measure the PR campaigns. Number of clippings (32.7%) continues to be the first priority, followed by social talk on the brand (21.8%), growth of social media followers (15.8%), and brand image improvement (15.8%).

In addition, effectiveness-related KPIs have been increasingly leveraged. PV/Click/Engagement, sales growth and traffic change in-store / online store are the most mentioned. Among the mentions, the proportion of PV/Click/Engagement is over one fourth, which is much higher than was seen in the last wave.

对于如何衡量代理商在公关活动中的表现，市场主过往更偏向依据与品牌相关的考核指标。其中，保持在第一的是媒体报道的数量（32.7%），其后分别是关于品牌的舆论走向（21.8%）、粉丝数量的增长（15.8%）以及品牌形象的提升（15.8%）。

然而今年我们发现，一些与效果（Effectiveness）相关的考核指标被越来越多市场主所采用，最常见效果指标包括：浏览量/点击量/互动量、销售增长、进店人数/网点人流的变化等。而“浏览量/点击量/互动量”更是被超过四分之一的市场主包括在对公关代理商的考核指标中，其比例相比上一轮研究有明显的上升。

## MEASUREMENT ON PR CAMPAIGN PERFORMANCE 衡量公关活动表现最常用的方式



CLIENT-AGENCY RELATIONSHIPS 2017. 232. DATA IN %.



### BEST PRACTICE 最佳实践： GET THE HIGHEST RETURN ON DIGITAL THROUGH MEDIA AUDITING. 通过数字媒介审计，达成最大化的回报。

To maximize the return on digital, implementing a media marketing process audit ensures effective allocation of resources. This is where third party consultants can leverage their cross-industry experience to compare the digital media of marketers against industry benchmarks on strategy, communication, execution, collaboration, and media costs. Only then can marketers pinpoint areas in need of improvement so that their digital media strategy is positioned to reach its maximum potential.

为了提升数字媒体营销的投资回报率，市场主应深入了解数字媒体营销的各个环节，而数字媒介审计则为达成这一目标提供了良好的依据和保障。第三方咨询公司拥有丰富的跨行业经验及业内基准，能够帮助市场主从数字营销策略的制定、与代理商的沟通、策略执行、合作流程到投放价格等各个环节进行比对。这样，市场主能清晰地知道自己的投入是否有效、代理公司提供的策略是否合理、得到的价格是否优于市场平均水平以及与代理商的合作流程是否有进步空间，从而能够有针对性的提高数字营销管理水平及效率。

## 7

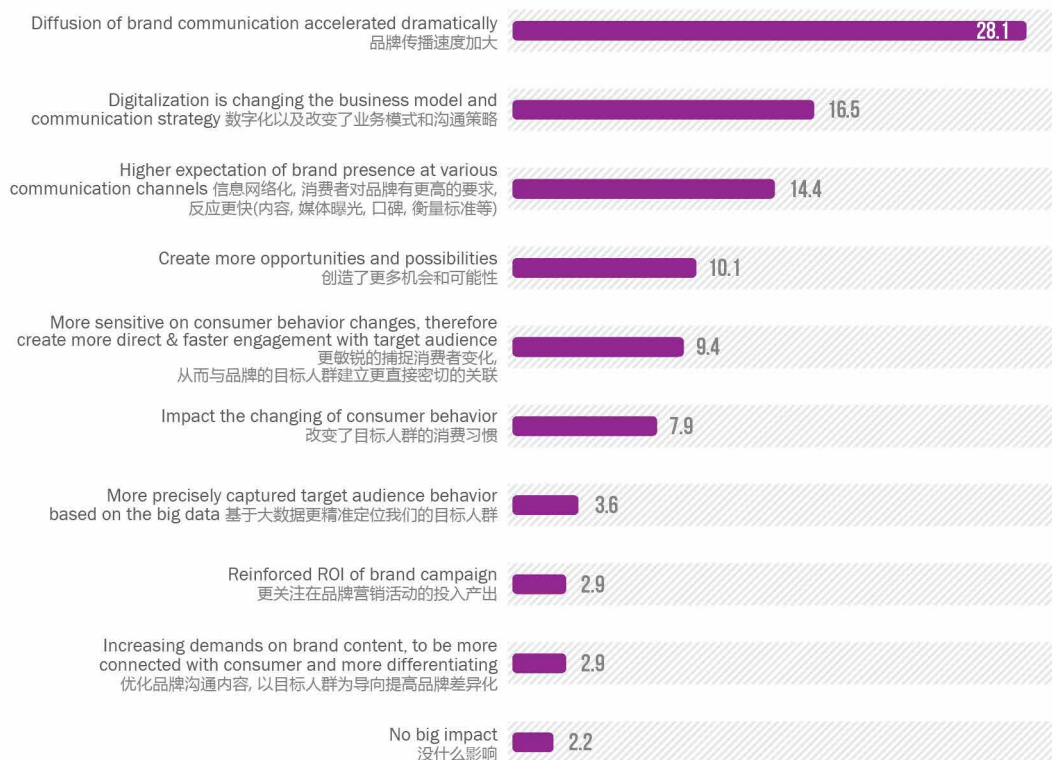
## THE IMPACT OF THE DIGITALIZATION OF INFORMATION HAS CHANGED THE RELATIONSHIP BETWEEN THE BRAND AND ITS TARGET AUDIENCE.

信息数字化促进了品牌与目标人群的关系，同时也带来危机管理的挑战。

In this age of digital transformation, the diffusion of all brand information has accelerated dramatically (28.1%), changing the business model and communication strategy (16.5%), and also creating higher expectations of brand presence on various communication channels (14.4%). Encouragingly, digitalization also creates more opportunities and possibilities (10.1%), so that both marketers and their agency can be more aware of consumer behavior changes, and can therefore generate more direct and faster engagement with the target audience (9.4%).

市场主认为信息数字化带来了一些积极的影响，包括品牌传播的速度加快、数字化已经改变了品牌的业务模式和沟通策略、促使消费者对品牌有了更高的要求、信息数字化创造了更多的机会与可能性等。因此，市场主和其代理商能更敏锐地捕捉消费者变化，从而与消费者建立更直接、更紧密的关系。

### POSITIVE IMPACT BY THE DIGITALIZATION OF ALL INFORMATION 信息数字化的正面影响



CLIENT-AGENCY RELATIONSHIPS 2017: 232. DATA IN %.

Meanwhile, the effect on crisis management has been negative, with it much easier to lose control (20.4%) and have negative information spread faster (16.3%). With such rapid fragmentation, it has also become harder to evaluate the actual brand promotion effectiveness on digital/social platforms (sales conversion) (14.3%).

然而，信息数字化是一把双刃剑。危机管理的难度加大、负面消息传播地更快、多样化的数字平台导致难以评估营销活动的有效性等也给市场主带来了不少的挑战。如何在快速发展的信息时代及早预估并有效规避风险，是中国公关行业的共同课题。

## NEGATIVE IMPACT BY THE DIGITALIZATION OF ALL INFORMATION 信息数字化的负面影响



CLIENT-AGENCY RELATIONSHIPS 2017: 232. DATA IN %.

# 8

## MARKETERS EXPECT PR AGENCIES TO FOCUS MORE ON DIGITAL TRANSFORMATION.

公关代理商需要加强现有数字互动能力。

Until PR agencies can offer truly integrated services, 43.2% of marketers said they would work separately with the PR agency and another Digital/Social agency, and get the core competencies from both agencies, or to get their current PR agency to work in collaboration with another Digital/Social agency (25.2%). Only 24.5% of marketers suggested having their current PR agency establish a digital division, while 7.1% of marketers plan to have their service team in their current PR agency reloaded with digital professionals.

在公关代理商能够真正提供整合型服务之前，43.2%的市场主分别给公关代理商和数字互动代理商布置工作，并从两家各取所长。同时25.2%的市场主希望让其现有的公关代理商与另一家数字互动代理商进行合作。另有24.5%的市场主建议让其现有的公关代理商设立数字互动部门，并进行内部协同工作。7.1%的市场主希望让其现有的公关代理商撤换服务团队，加入数字互动方面的专业人员。

## 9

**A TRULY INTEGRATED PR AGENCY WITH DIGITAL CAPABILITIES WOULD FULFILL GROWING DEMANDS AND WIN OVER THE MARKET.**

引领数字化整合营销变革的公关代理商将赢得更多市场主的关注。

Looking to the future, it is clear that digitalization in PR communications is still evolving. For both marketer and agency, rapid adaption to the developing environment and consumer needs (18.9%) has become critical. Marketers have higher expectations for PR agencies' breakthrough creativity at PR deliverables, especially with digital offerings (15%). Meanwhile, PR agencies need to be proactive at providing insightful suggestions as to improving brand preference, and in addition, sales performance (14.4%).

当我们展望未来，数字化营销仍将带动公关行业。对于市场主及代理商来说，快速适应营销环境的变化并满足消费者多元化需求（18.9%）是制胜的必要因素。市场主有更高的期待，希望代理商能够不拘泥于传统公关，具有与时俱进的创新力，特别在数字化服务方面（15%），同时能够主动提出建设性洞察，提高品牌好感度，及促进销售（14.4%）。

**BEST PRACTICE 最佳实践：****BUILD THE BEST AGENCY TEAM THROUGH COLLABORATION.**

群策群力，构建最佳代理团队。

It is a good rule of thumb for marketers to do their due diligence on PR agency offerings as well as the agency team. In the midst of a fragmented media space with unlimited channels for communication, it is expected that PR agencies develop specialties in different areas. With stronger knowledge about the capabilities of PR agencies, marketers have a far better chance of finding the best fit agency to execute a communications strategy.

Independent third party consultation can help marketers to find an agency with the right fit — or to assemble a team of agencies to leverage different areas of specialization. With a real-time knowledge base of various agency offerings, including their specialties and agency team, third party consultants can facilitate marketers to better identify, evaluate, and position agencies to best meet their needs.

对于市场主来说，充分了解代理商的能力、长处以及团队非常重要，因为再好的创意和策略都是通过代理商的团队来执行的。面对越来越碎片化的媒介环境，公关代理商应该具备相应的应对技巧。因此，越了解公关代理商真实能力的市场主，越能找到最适合的代理商帮助其执行传播策略。

独立的第三方咨询公司能够帮助市场主寻找到满足不同需求范畴的代理商，或组织专家来帮助进行专门、高级别的管理。第三方咨询公司拥有丰富的资源与行业知识，能够随时了解代理商的各种产品、专业能力、长处和团队变化，帮助市场主准确地识别、评估和定位能够满足他们特殊需求的公关代理商。

## 10

**LOCAL AND BOUTIQUE PR AGENCIES ARE ALREADY GAINING THE COMPETITIVE ADVANTAGE.**

公关代理商未来发展所需的竞争优势已经逐渐在本土精品公关代理商中显露。

Based on actual agency performance from this study, boutique local PR agencies have already overtaken multinationals in several key areas. Although the multinationals still lead in good international networks (68.1%), having good relations with the media (75.8%); and marketers paying more attention to senior management getting involved in the account (79.4%), the local agencies have pulled ahead in being up-to-date with the trends and agile in applying new media and channels (59.6%); their ideas are executable and relevant to consumers (50.4%); and they are capable of digital solutions (58%).



根据此次代理商实际表现分析，小而美的本土精品公关代理商已经在公关行业中逐渐显露优势。相较于拥有良好的国际性网络（68.1%）以及与媒介保持良好关系（75.8%）的国际公关代理商，市场主对于本土代理商的满意度更多体现在：高层管理人员参与到客户服务中（79.4%）；紧跟潮流，擅长运用新媒体和渠道（59.6%）；想法具备可执行性，契合消费者实际情况（50.4%）；有能力提供数字化解决方案（58%）。



## **BEST PRACTICE 最佳实践：** **CULTIVATE COMPREHENSIVE CAPABILITIES IN LOCAL TALENT.** **落实本土人才综合实力培养计划。**

Apart from multinational agencies, a large number of local agencies are coming out to fight for a piece of the pie. For these small local agencies, their ability to adapt quickly to the ever-changing industry serves as a home-field advantage in a market in which most global agencies are not as nimble to opportunity as their local counterparts. China is home to over 44,500 local agencies, all fighting for market share. Today, every company has a local agency somewhere in their portfolio, driving more and more pressure on speed and cost to market. The pressing need for local insight is apparent – but local talent in of itself is not enough. To meet the communications needs of their clients, PR agencies must be able to provide a comprehensive service offering and effective tools to articulate local insight in the right way.

与国际代理商的处境非常不同，本土代理商常常为了一单小额生意与同行开展激烈的竞争。但是当面对瞬息变化的中国市场，这些规模有限的本土代理商则能展现出高效的应对能力，表现出明显的主场优势。而与之相反，大部分的国际代理商则无法敏锐地捕捉这种市场先机。中国是一个拥有超过44,500家本土代理商的市场，所有人都竭尽所能地争取更多的市场份额。今天，所有大型企业都会与至少一家本土代理商进行合作。由此可见市场主对本土市场洞察的需求是十分迫切的，但市场上好的本土人才却是缺乏的。为了更好的满足市场主的传播需要，公关代理商必须能够提供一套周全的服务、有效的辅助工具以确保对本土市场的准确把握。

# METHODOLOGY 调研方法



## UNIVERSE 研究总体

Our Universe comprises all senior marketers who are responsible for PR marketing and brand communication in China. Their companies must be currently working with at least one PR agency in China. Those senior marketers interviewed in each company had to be involved in the decision-making process for selecting agencies and approving the work of their agencies. They also had to interact with PR agencies on an on-going basis. In addition to R3's own databases, leading PR agencies in China were asked for a list of their most important clients, who were collectively approached by our interviewers.

本次研究数据包含了在中国负责公关营销及品牌传播的资深市场管理人员。他们所在的公司目前至少与一家在中国的公关代理商处于合作关系。每家公司的受访人员必须有决策权，能够直接参与挑选以及核定代理商的工作。同时，持续地与公关代理商进行合作互动。除了胜三的数据库之外，国内领先的公关代理商也提供了他们的主要客户名单，我们邀请了这些客户参与我们的访谈。



## SAMPLE 研究样本

155 individuals working in 138 companies with 232 client-agency (PR) relationships analysed. In addition to individuals in marketing departments of client companies, we also interviewed the following professionals to complete the study: agency professionals (62 individuals) and trade press editors (11 individuals).

胜三针对138家公司的155位客户的232个客户-公关代理商关系进行分析。除了客户公司的市场营销部门，我们也采访了以下专业人士以确保研究的完整性：代理商同仁（62人），行业杂志编辑（11人）。



## TYPE OF INTERVIEW 访谈形式

Senior Marketers or Senior Directors did online and phone/face-to-face interviews. On-line interviews were conducted with agency professionals and trade press editors.

针对资深市场管理层或主要决策者的访谈主要以线上问卷调查+电话/面对面访谈的形式进行。线上问卷调查是针对于采购专业人员，代理商同仁及行业杂志编辑。

### INTERVIEWS AND RELATIONSHIPS 访谈量与关系

#### Marketers Interviewed 受访客户

Marketers on PR agencies 受访客户与公关代理商关系

# INTERVIEWS 访谈量		
2013	2015	2017
132	143	155

#### Client-Agencies Relationships Analysed 客户与代理商关系分析

Marketers on PR agencies 受访客户与公关代理商关系

# RELATIONSHIPS 关系数量		
2013	2015	2017
212	215	232

#### Other Professionals Interviewed 其他受访的专业人士

Senior Professionals working in PR agencies 资深公关代理商专业人士

Trade Editors on PR Agencies 行业杂志编辑对公关代理商的看法

Procurement 采购部人员

# INTERVIEWS 访谈量		
2013	2015	2017
80	69	62
12	12	11
*	29	28

## COMPANIES INTERVIEWED

### 受访市场主



GENTLE MONSTER



American Standard

AMOREPACIFIC



kindle



CLINIQUE



SIEMENS



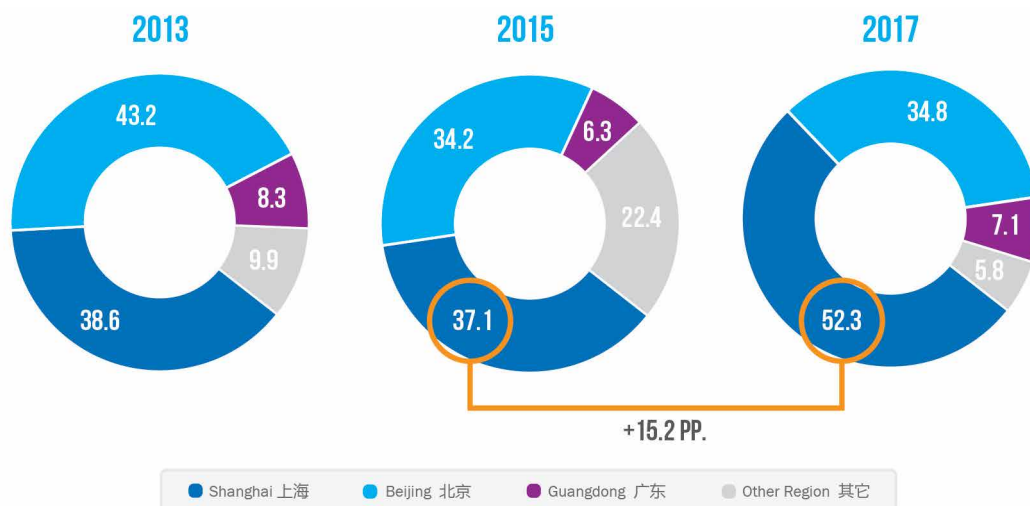




## CITY LOCATION 受访者地区分布

52.3% of the interviews were conducted in Shanghai (15.2 perceptual points increase compared with 2015); Beijing represents 34.8% and the rest of the interviews were conducted in Guangdong (7.1%) or in other regions in China (5.8%).

52.3% 的访谈是在上海进行（与2015年相比，积累了15.2个点）。34.8%的访谈在北京进行，7.1%在广东和5.8%在国内其它城市



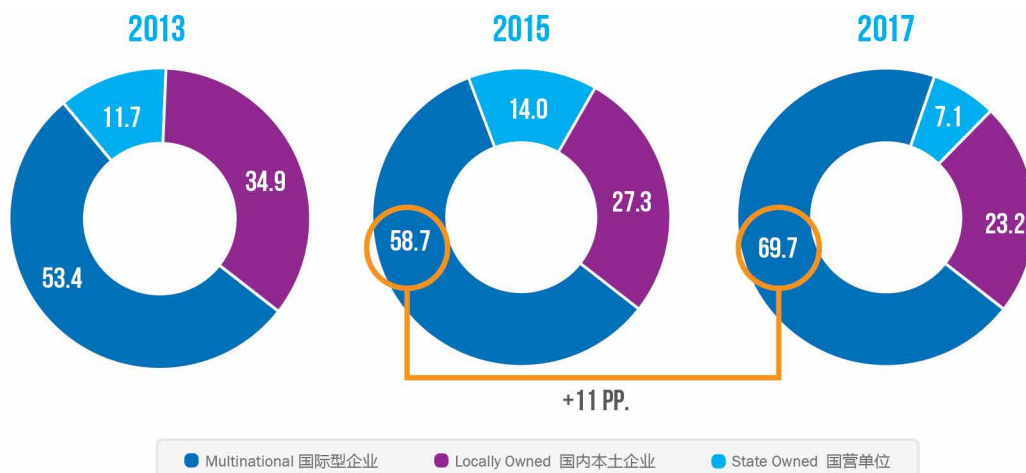
CLIENT-AGENCY RELATIONSHIPS 2013: 212, 2015: 215, AND 2017: 232. DATA IN %.



## TYPE OF COMPANY 公司分类

Most of our interviewees were from multinational companies (69.7%). The number of multinational companies has increased by 11 perceptual points compared with 2 years ago. The number of locally owned companies in the sample is very similar to 2015. The number of state-owned companies has been reduced.

多数的受访者来自于国际型企业（69.7%），与两年前比较国际企业的数量积累了11个点。国内本土企业的受访情况与2015年相似。国营企业有所减少。



CLIENT-AGENCY RELATIONSHIPS 2013: 212, 2015: 215, AND 2017: 232. DATA IN %.



## POSITION OF INTERVIEWEE 受访者职位

POSITION 职位	2013	2015	2017
President, CEO, CMO, GM 总裁, 首席执行官, 首席营销官, 总经理	5.3	5.6	4.5
PR / Media Relations Director 公关/媒体关系总监	3.0	16.1	14.2
PR / Media Relations Manager 公关/媒体关系经理	29.5	13.6	31.6
Brand / Communication Director 品牌/传播总监	1.5	4.2	7.1
Brand / Communication Manager 品牌/传播经理	12.9	11.2	14.2
Marketing Director 市场总监	18.2	16.8	10.3
Marketing Manager 市场经理	12.9	7.0	14.2
Other 其它	16.7	9.1	3.9

ROLE 职位	2013	2015	2017
Director & Above 总监级别或以上	28.0	45.5	36.1
Middle Management 非总监级别	72.0	54.5	63.9

GENDER 性别	2013	2015	2017
Male 男	N/A	N/A	30.3
Female 女	N/A	N/A	69.7

TENURE (AVERAGE YEARS) 任期 (平均年数)	2013	2015	2017
Current Position 当前职位	N/A	N/A	4.02
Current Company 在该公司任职	N/A	N/A	3.75

CLIENT-AGENCY RELATIONSHIPS 2013: 212, 2015: 215, AND 2017: 232. DATA IN %.

# R3 PRINCIPALS 胜三总裁



**GREG PAULL**  
**PRINCIPAL & CO-FOUNDER 总裁**

Originally from Australia, Greg spent the first 20 years of his career on both the marketer and agency sides in the US, Europe and Asia Pacific. In 2002, he co-founded R3: a global independent consultancy to CMOs on improving the efficiency and effectiveness of marketers and their agencies. R3 has since expanded to manage global relationships with Unilever, Samsung, Pfizer, Coca-Cola, Visa and JNJ. Greg recently co-authored “China CMO,” a detailed analysis of marketing in the Middle Kingdom.

来自澳大利亚的包贵革将职业生涯的第一个20年奉献给了亚太地区的广告主和代理商。具备双方丰富经验的他敏锐的发现了为市场主提供独立咨询服务这一市场需求——正是这一发现促使他与淑芬联合创办了胜三公司。包贵革的品牌服务经验涵盖了众多行业和地区，为包括诺基亚、奥迪、惠普、微软和美国运通卡在内的多家客户提供在中国大陆、香港、新加坡、澳大利亚、马来西亚、欧洲和美国地区的解决方案。无休止的全球商务旅行让包贵革尝尽全球美酒美食，他骄傲的称自己为品酒师和美食家。



**SHUFEN GOH**  
**PRINCIPAL & CO-FOUNDER 总裁**

ShuFen Goh is the co-founder and Principal of R3. With over two decades of experience in the creative industry and with corporate brands, she is a pioneer in advancing the practice of marketing effectiveness through optimization of agency partnerships and measurement, working with companies such as Coca-Cola, Johnson & Johnson, Unilever, Visa and MasterCard. ShuFen also serves as the President of the Institute of Advertising Singapore, chairperson of the regional APPIES awards, and sits on several boards including Singapore National Gallery, Design Masterplan Committee and the MasterCard Digital & E-Commerce Advisory.

2002年，淑芬与合伙人包贵格共同创立胜三公司。在此之前，淑芬曾任职奥美，与众多顶级快速消费品客户合作。从业20多年间，她与可口可乐，联合利华和宝马等全球知名品牌合作，积累了销售、市场营销和代理商管理的各方面经验。丰富的阅历和出众的企业家精神为她赢得了在上思广告创始阶段的新业务拓展总监一职。任职期间，她凭借深厚的资历与过人的魄力成功拿下可口可乐和新加坡电信等新业务。在胜三，她领导了新加坡航空、恒天然集团以及Visa等客户的全球代理商委任项目。淑芬在市场营销创新和营销效力改进方面也颇有建树，在任职之余她还担任APPIES广告大奖主席和新加坡广告协会副主席，在各种角色转换中游刃有余。生活中，淑芬是个十足的瑜伽狂人和烹饪好手。



## 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.

## CLIENTS

We are retained by eight of the top twenty marketers – covering 60+ markets on six continents.



## 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 多位市场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。



## 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。

### 我们的客户

我们与全球顶尖的 20 家广告主中的 8 家保持长期良好的合作关系,业务范围涵盖全球 8 大洲,共计 60 多个市场。



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