



CHINA AGENCY SCOPE

中国营销趋势研究

2020

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

INTRODUCTION

AGENCY SCOPE is a biennial research on trends shaping marketer-agency relationships and the perception and image of those agencies. This R3-SCOPEN 2020 AGENCY SCOPE report is the 8th edition for China, and in this edition, we interviewed professionals from 242 different companies.

The primary value of AGENCY SCOPE is to provide agencies with first-hand information regarding the needs of their clients.

The report acts as a reference point for agencies to improve and provide new services as it covers trends in the communications and marketing sector and compares the perception and image of their agency to other Chinese agencies.

AGENCY SCOPE is conducted in 12 markets around the world (Argentina, Brazil, Chile, China, Colombia, India, Mexico, Portugal, Singapore, South Africa, Spain, and the United Kingdom), which enables us to include global benchmarks in some key aspects.

营销趋势研究是一项两年一度的趋势研究，旨在通过了解市场主-代理商关系，深入分析代理商的市场看法和实际表现。2020中国营销趋势研究是在中国发表的第八版，此次在中国开展的调研中，我们共采集到了来自242家不同企业的市场营销专业人士的意见。

营销趋势研究的主要价值是向订阅代理商提供关于其客户需求的第一手信息。

作为一项独特的工具，本研究能够帮助代理商优化服务和开拓新的业务。报告涵盖了营销传播的核心发现及市场趋势，体现了市场主对代理商的看法，并与其竞争对手进行比较。

类似的调研也在全球范围内的其他12个市场同步开展（包括阿根廷、巴西、智利、中国、哥伦比亚、印度、墨西哥、葡萄牙、新加坡、南非、西班牙及英国），因此我们在一些关键指标上会与全球市场的表现进行比较。

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Principal, R3

包贵革
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METHODOLOGY

Our universe of analysis is comprised of the highest-level decision-makers in marketing, procurement, communications (integrated, BTL, digital) and media from the largest and most important marketers in China.

SAMPLE

Participants from each company had to be working for a company with at least one communication or media agency and be directly involved on an on-going basis in the selection and approval of their agencies' work.

- 551 individuals
- 242 client companies
- 612 client-agency (Integrated, Marketing Services -BTL, Digital and Media) relationships
- 180 agency professionals interviewed
- 12 trade press editors
- 36 procurement directors

Each year, we gather opinions from more than 3,000 marketer interviews globally. 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.

我们的分析数据来源于中国领先品牌负责营销传播(整合营销, 线下营销, 数字营销), 媒介及采购部的资深决策人员。

样本

受访人员所在的公司就现阶段必须至少与一家在中国的营销传播或媒介代理商处于合作关系。每家公司的受访人员必须能够直接参与挑选以及核定代理商的工作。同时, 持续地与营销传播或媒介代理商进行选择与评估。

数据概览:

- 551位受访客户
- 242家公司
- 612个客户-代理商关系(整合营销, 线下市场营销, 数字和媒体)
- 180位代理商同仁
- 12位行业媒体编辑
- 36位采购主管

每年, 我们都将采集全球范围的3000位以上的类似采访意见。除了R3-Scopen的数据库之外, 国内领先的代理商也提供了他们的主要客户名单。这些客户也应邀参与了我们的访谈。

SAMPLE PROFILE 访谈概况

A total of 551 Professionals Interviewed in 2020 共有551位营销专业人士接受了访谈

MARKETING PROFESSIONALS INTERVIEWED 受访客户	2018	2020
MARKETING PROFESSIONALS INTERVIEWED 受访客户	406	323
WORKING WITH INTEGRATED AGENCIES 受访客户参与整合营销代理商评估人数	215	202
WORKING WITH MARKETING SERVICES AGENCIES (BTL) 受访客户参与线下市场营销代理商评估人数	76	52
WORKING WITH DIGITAL AGENCIES 受访客户参与数字营销代理商评估人数	159	123
WORKING WITH MEDIA AGENCIES 受访客户参与媒介代理商评估人数	154	97
CLIENT-AGENCIES RELATIONSHIPS ANALYSED 客户与代理商关系分析	746	612
INTEGRATED AGENCIES 受访客户与整合营销代理商关系	272	287
MARKETING SERVICES AGENCIES (BTL) 受访客户与线下市场营销服务代理商关系	109	67
DIGITAL AGENCIES 受访客户与数字营销代理商关系	198	151
MEDIA AGENCIES 受访客户与媒介代理商关系	167	107
OTHER PROFESSIONALS INTERVIEWED 其他受访的专业人士	245	228
SENIOR PROFESSIONALS WORKING FOR COMMUNICATION AND MEDIA AGENCIES 资深营销传播代理商和媒体代理商专业人士	199	180
TRADE PUBLICATIONS EDITORS 行业杂志编辑	14	12
PROCUREMENT DIRECTORS 客户方的采购部人员	32	36

10 KEY TRENDS & BEST PRACTICE

十大主要趋势与最佳实践

The R3-SCOPEN 2020 AGENCY SCOPE Study provides an in-depth look at China's advertising industry, exploring trends in client-agency partnerships, selection and remuneration. In the following pages we highlight 10 key findings that provide an overview of how the landscape is changing, and included best practice recommendations to help marketers and their agencies leverage these trends.

R3-SCOPEN 2020营销趋势研究对中国传播行业进行了深入观察，探索了客户与代理商合作伙伴关系，代理商甄选标准和费用方面的趋势。在接下来的几页中，我们重点介绍了10个主要发现，这些发现概述了形势如何变化，并包括了最佳实践建议，以帮助营销人员及其代理商更有效地利用这些趋势。

1 Digital Makes Up 50.1% of Marketing Budgets.
数字营销的投入占市场预算的50.1%。

2 Best-in-Class Specialist Agency Model Predominates, But Nearly 31% 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31%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。

3 Marketers Have Increased Their Number of Ongoing Agency Relationships by 12.5%.
同时与多个代理商保持合作关系的市场主比例上升12.5%。

4 The Average Duration of Client-Agency Relationships is stabilized in 3 Years.
市场主与代理商的平均合作关系稳定在3年。

5 Marketers Continue to Look In-House for Solutions Across Marketing Disciplines.
市场主持续在内部寻找跨领域营销解决方案。

6 Marketing Professionals Are Generally Satisfied With Their Current Agency Partners.
市场从业者大体上对目前合作的代理商伙伴表示满意。

7 Knowledge, Strategic Planning & Creativity-Innovation Are Qualities Marketers Mention Most When Defining the 'Ideal' Agency.
当定义“理想”代理商时，专业知识，策略规划及创新能力是首要能力要求。

8 Agency Pitch Remains The Most Popular Method for Selecting An Agency.
比稿仍然是市场主甄选代理商伙伴的主要方式。

9 Project-Base Remuneration Is Gaining Popularity, As Fee-Based Remuneration Continues To Find Less Favor.
当项目制的合作关系越来越获得青睐，选择年费制收费模式的品牌则日益稀少。

10 88.9% of Procurement Teams Are Involved in the Entire Pitch and Negotiation Process.
88.9%的采购部全程参与比稿及比价流程。

1

DIGITAL MAKES UP 50.1% OF MARKETING BUDGETS 数字营销的投入占市场预算的50.1%

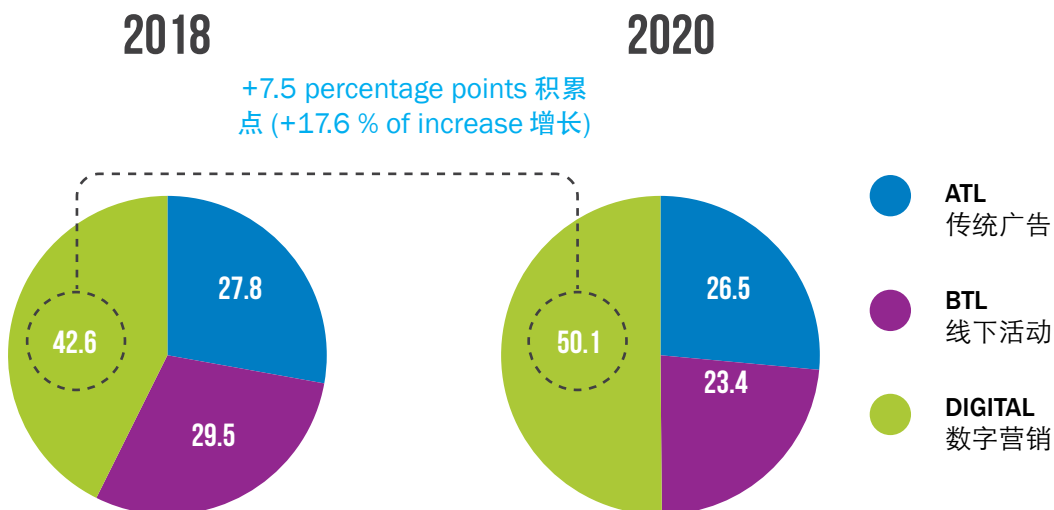
Over the past five years, China's marketing landscape has transformed into a digital-first market. Previously lagging behind countries like the UK, digital marketing now accounts for 50.1% of the average marketing budget in China, up 7.5% since 2018 and almost doubling since 2016. This makes China a leader in digital spend, surpassing the global average (35.9%). Investments in above-the-line (ATL) and below-the-line (BTL) marketing has decreased globally, falling in China by 1.3% and 6.1% accordingly.

在过去5年里，中国营销市场变成了数字为先。之前已经相较之后的国家，如英国，目前数字营销预算仅仅占中国50%平均营销预算。这个比例自2018年以来增长了7.5%，自2016年以来几乎翻了一番。这使得中国在数字花费处于领先地位，超过了全球平均水平(35.9%)。在全球范围内，传统线上(ATL)和线下(BTL)营销的投资有所下降，中国相应下降1.3%和6.1%。

STRUCTURE OF COMPANIES (MARKETERS) 公司架构

Marketing Budget (ATL / BTL / DIGITAL Split)

市场营销预算（传统/线下/数字营销分配）



R3-SCOPEN BEST PRACTICE

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

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.

R3-SCOPEN 最佳实践

媒介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，衡量营销沟通的投资回报率和不同媒介的贡献在如今显得尤其重要。

与各代理商伙伴共同商议并制定清晰的业务目标，如何实现，并设置衡量标准以判断目标贡献程度。媒体预算规划的决策需有可靠责任机制为基础，与合作代理商共同设定目标，并将其纳入代理商费用结构之中。

2

BEST-IN-CLASS SPECIALIST AGENCY MODEL PREDOMINATES, BUT NEARLY 31% 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31%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

The most common agency relationship model, mentioned by 87.6% of respondents (91.8% in 2018), is structured around several agencies working with the marketing team. When they think in the future, 31.3% of respondents would choose a fully integrated agency model 'if it solves all their communication needs'. The market is moving towards greater collaboration with 6 out of 10 Marketing Professionals appointing a lead agency to provide strategic direction and help manage their inter-agency coordination

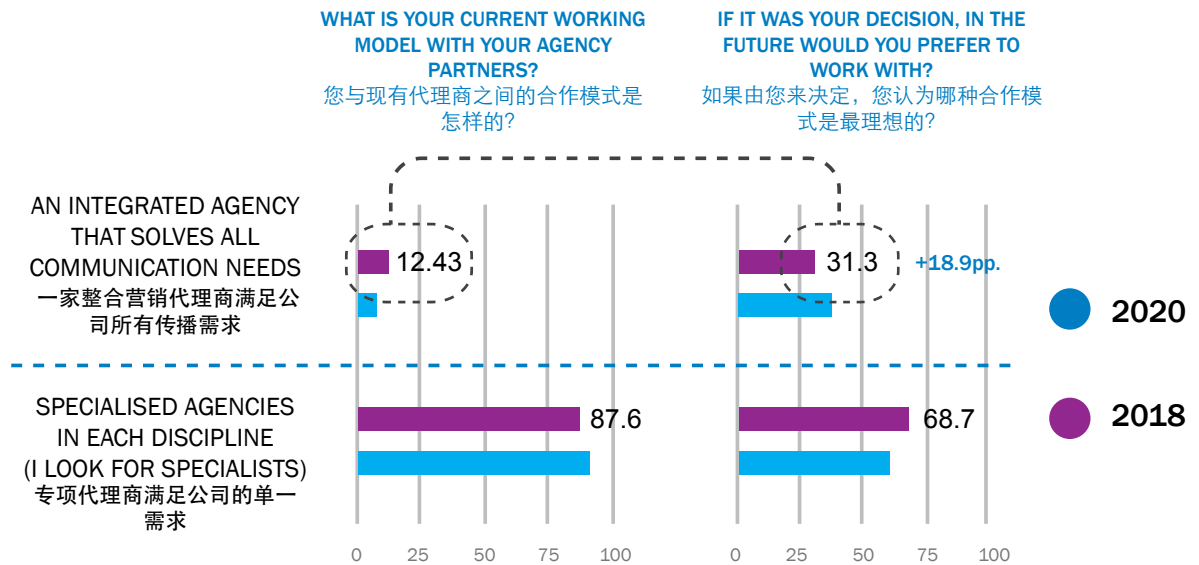
87.6%的受访者提到, 最常见的代理关系模式是与拥有不同专项能力的代理商协作以完成不同方面的传播需求(2018年为91.8%), 当他们考虑未来时, 31.3%的受访者表示, 更期望能和一家完全整合的代理商合作, “如果它能解决他们所有的营销需求”。同时每10名市场主中有6位采用主导代理商模式, 提供战略指导并帮助管理与其他代理商的合作。

STRUCTURE OF COMPANIES (MARKETERS) 公司架构



COMMUNICATION AGENCIES

Ways 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)



China is well above the global benchmark for using specialized agencies (68.7%), with other markets adopting a more integrated approach. However, 18.9% of marketers surveyed would prefer to move from their current specialized model to working with an integrated communications agency if it was their decision.

中国在使用专项代理商比例上远远高于全球基准(68.7%), 其他市场更倾向于与整合营销代理商合作。然而, 在采访中, 18.9%的市场主表示, 如果他们有决定权, 他们更愿意从目前的专项性代理商合作模式转为与一家整合营销代理商合作。



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