



CHINA PR AGENCY SCOPE
中国公关行业营销趋势研究

2020

An R3 Report

PREFACE

前言

2020 China PR Scope is the sixth wave in an ongoing study with the goal of garnering a deeper understanding of the motivations and processes involved in public relations in China.

The data was collected through a series of interviews with senior marketers who serve as decision-makers of some of the largest companies in China.

This study is a tool for taking action. It provides an analysis of trends in the ever-changing world of PR agency-client relationships, and brings clarity to agency perceptions amongst current and prospective clients.

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 such ongoing studies and analysis.

2020公关行业趋势研究是在中国市场进行的第六次研究，旨在探索中国公关行业的发展与变革。

我们的数据来源于对来自中国/国际领导品牌的资深市场决策者的一对一深访。该研究作为战略工具，对不断变化的市场主-代理商关系进行了解析，深入地剖析了代理商在市场上的认知。

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。

KEY PR/COMMUNICATION TRENDS

主要趋势



CONNECTING WITH NEW AUDIENCES

Apart from the dynamic changes in the media landscape, brands are also refreshing their audience segments. This has prompted brands to adjust their image to appeal to broader audiences and/or undertake a more precision-driven approach in their communication messaging.



CREATING A MORE HOLISTIC CONSUMER EXPERIENCE

Although digital and mobile transformation enables more virtual consumer touchpoints, for many brands the territory of experience still exists in real life scenarios. Many marketers are still learning how to integrate online and offline communication channels to provide a holistic brand engagement.



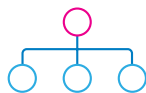
EVOLVING CONTENT DISTRIBUTION CHANNELS

Content distribution channels are evolving in tandem with consumer media behavior. Media channels are also changing how they work with brands. For example, each platform has its own rules and creative mechanisms, and it is crucial for digital/ social agencies be innovative and keep up to date with market new practices.



MANAGING AND UTILIZING DATA

Building a transparent data pool with clear customer data points and tags is still a challenge. Building a solid infrastructure is the first step to good data management, and this comes before addressing the question of how to utilize data in terms of data distribution and target audience segmentation.



BUILDING EFFECTIVE AGENCY MODELS

The entire agency industry has been forced to evolve to meet the needs coming from digital and new media transformation. A new understanding of agency competence should be achieved through an effective agency partnership model to ensure marketing and business goals are met during such revolutionary times.

2020 PR KEYWORDS

公关领域关键词

These keywords were the most frequently mentioned as extracted from over 100 hours of interviews with marketers.

以下是今年趋势调研中出现频率最高的关键词, 它们代表了公关领域的市场主, 采购及代理商同仁最关注的趋势变化、考量、担忧、以及挑战。



10 KEY TRENDS

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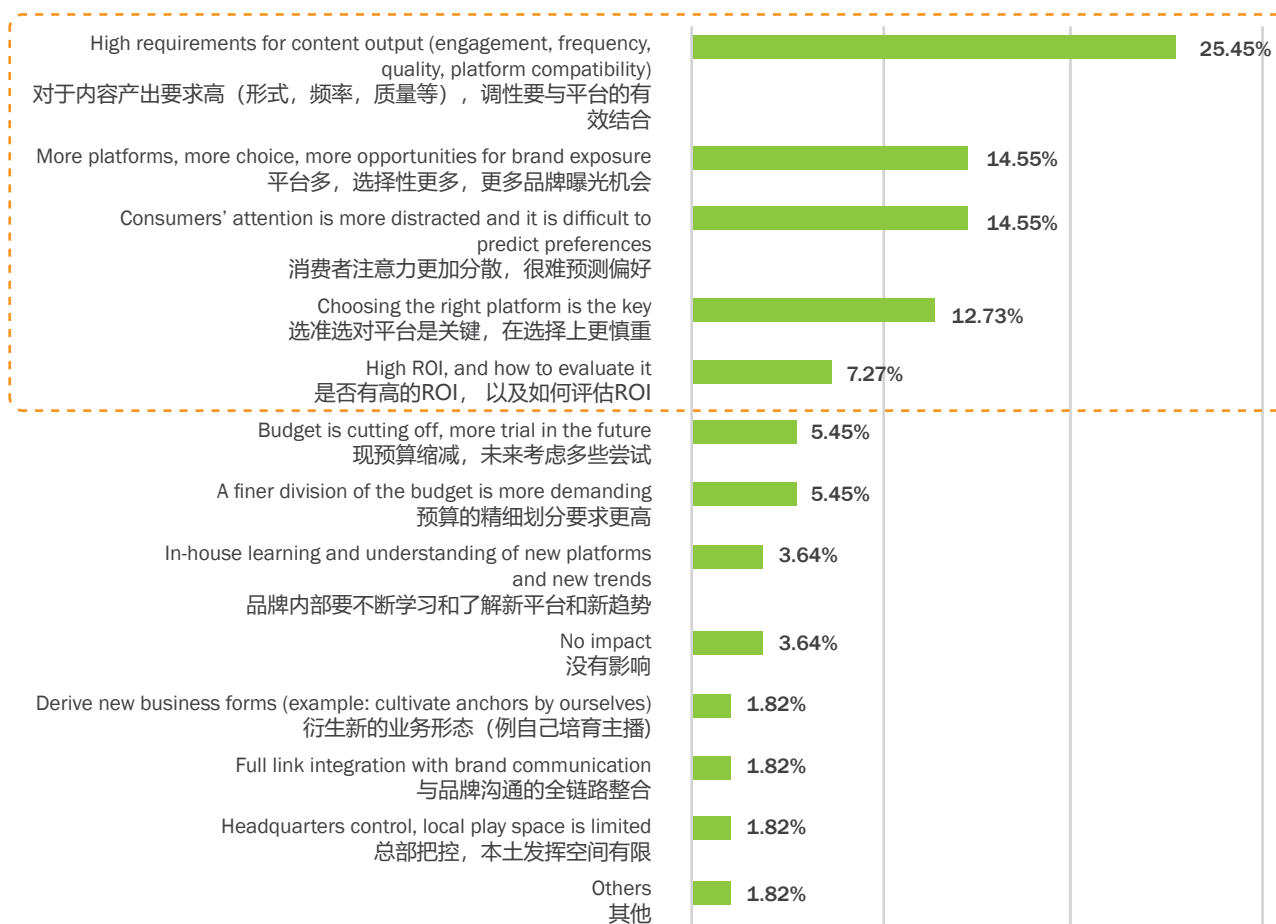
KNOWLEDGE OF PLATFORMS AND CONTENT IS CRUCIAL FOR SUCCESS

The diversity of platforms has brought new opportunities and ways to reach consumers. At the same time, this demand has increased the need for deeper understanding of new platform features, content formats and data.

对于新媒体的发展，受访客户的反馈呈不同的态度，平台的多样性，帮助品牌有更多的传播机会，更容易触达消费者的同时，对内容质量把控及平台特性的了解，要求会更高。

DEVELOPMENTS IN NEW MEDIA HAVE MADE PR COMMUNICATION APPROACHES MORE COMPLEX AND DIVERSIFIED. HOW HAS THIS IMPACTED YOU?

新兴媒体的发展，使公关形式更加复杂和多样，对您品牌的公关传播有何具体影响



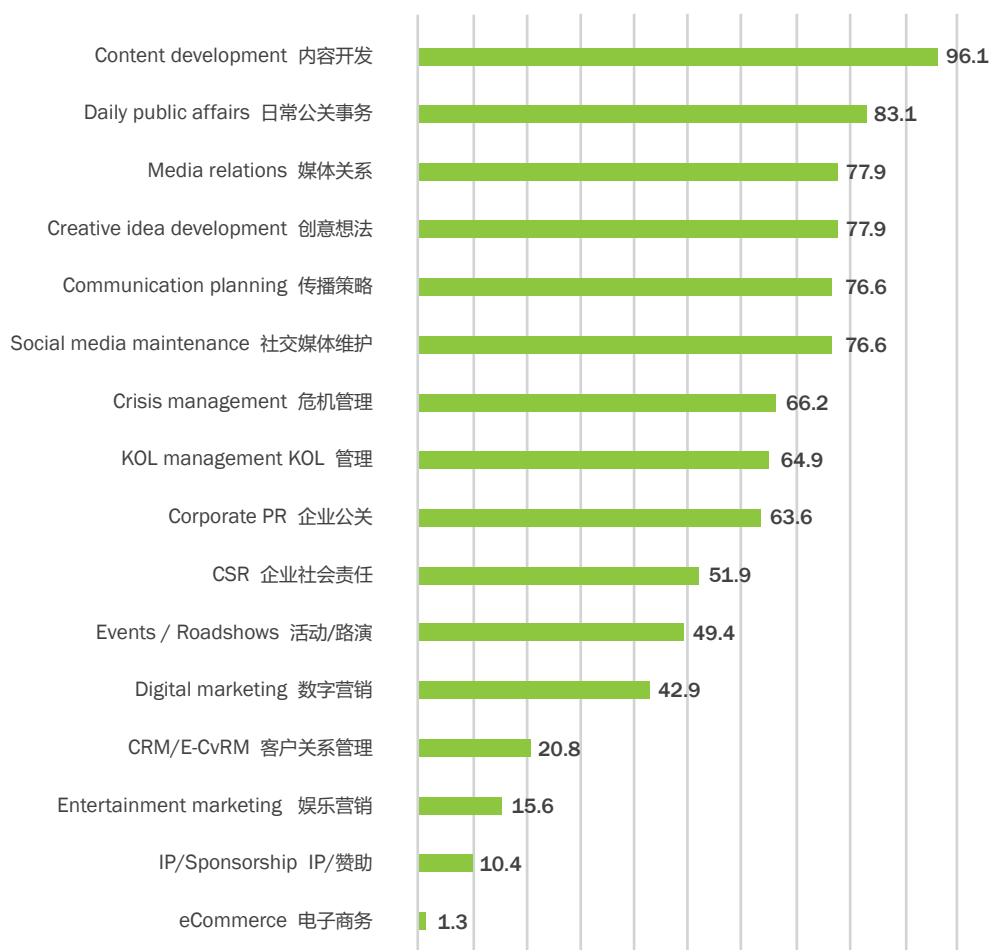
Note: Marketers interviewed 2020 (121), data in %

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SCOPE OF WORK HAS EXPANDED TO INCLUDE IP AND E-COMMERCE

The scope of work of public relations agencies have expanded considerably. About 20% of PR agencies are also involved in CRM, and 15% are in charge of IP sponsorship and e-commerce communication.

公关代理商的工作范畴有相当程度的扩充和丰富化 - 20%的公关代理商负责CRM, 15%的公关代理商负责IP/赞助, EC等。



Note: Client-Agency relationships cy 2020 (139), Data in % and Average.

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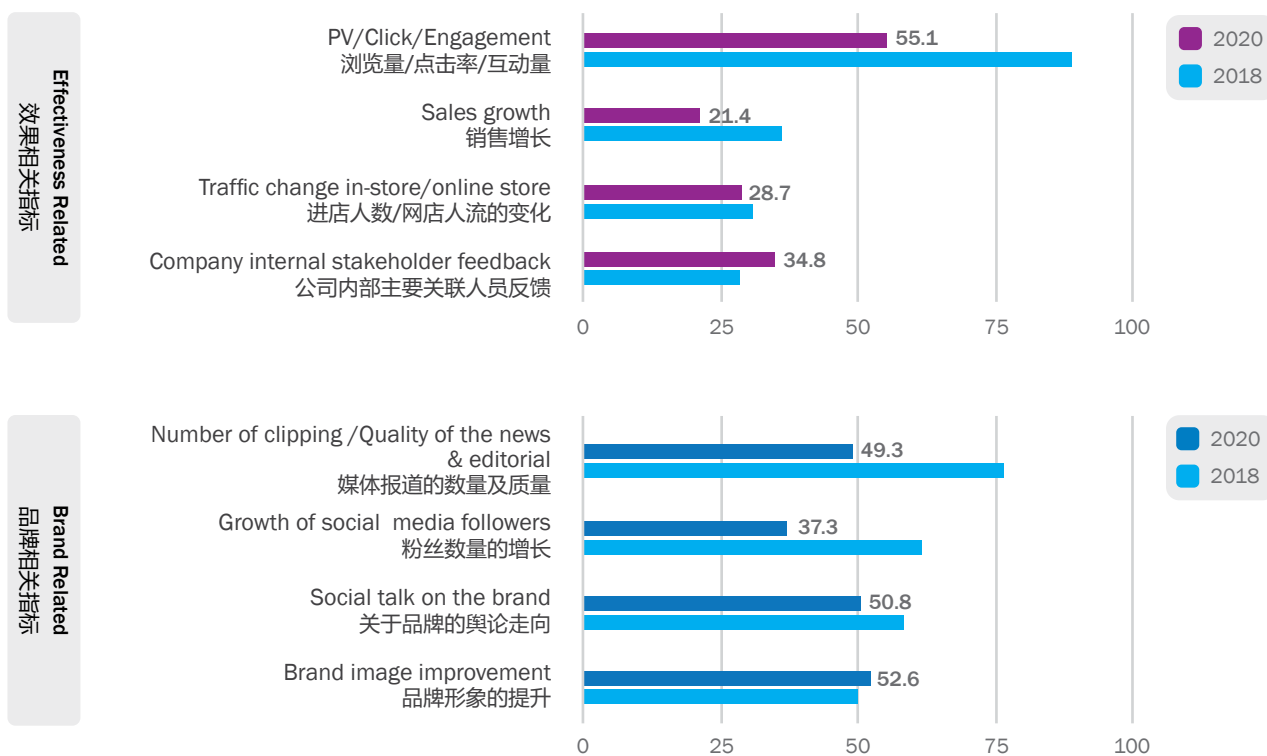
CLIENTS ARE MORE INVOLVED IN DRIVING PERFORMANCE

Compared to the last wave, conversion and sales performance has dropped considerably, and the feedback from client stakeholders has increased to 34.8%, which indicates a resurgence in comprehensive service evaluation.

销售转化及效果的KPI相较于上一届研究有明显减弱，公司关联人员的反馈在今年的指标有上升至34.8%，体现出市场主对于代理商的服务和综合表现越来越看重。

WHAT IS THE KPI YOU SET UP TO EVALUATE YOUR PR AGENCIES' PERFORMANCE?

对于公关代理商您有设定什么KPI来评估他们的表现吗？



Note: Marketers interviewed 2020 (121), 2018(152). data in %

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FINDING TALENT WITH THE RIGHT SKILLS REMAINS A CHALLENGE

19.1% of respondents believe that talent is the biggest challenge facing PR agencies, as talent deficiency proves serious.

19.1%的受访者认为人才的维护是公关代理商面临的最大挑战，目前的状态是人才的断层比较严重。

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IN-HOUSE AGENCIES AND THIRD-PARTIES ARE BLURRING BOUNDARIES

PR agencies' scope of work is becoming further merged with other disciplines, with some functions being replaced by other agencies (9.5%), and more clients bringing PR in-house (9.5%).

除了人才的挑战之外，随着公关代理商的工作范畴与其他营销范畴相融合，9.5%的市场主表示公关工作被其他代理商取代以及9.5%的客户内部来处理公关事务。



Note: Marketers interviewed 2020 (121), data in %

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STRENGTH IN BIG-PICTURE THINKING CAN LEAD TO GREATER INFLUENCE

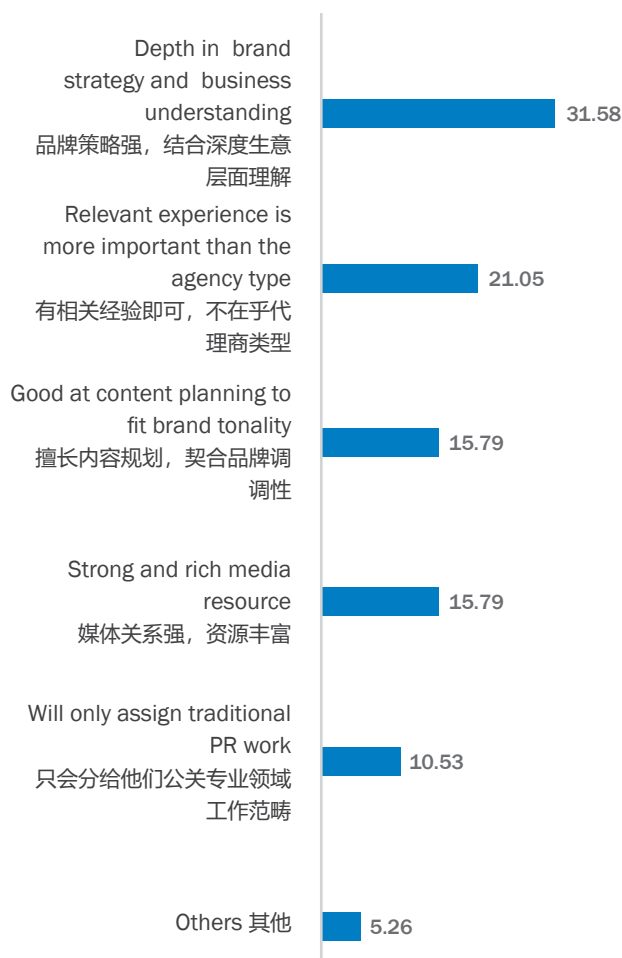
In addition to PR specific functions, interviewees generally believed that PR agencies have a deeper understanding of brands. Compared with other types of agencies, they are more able to think and plan from a holistic perspective leading to better strategy and integration. This is also an important reason why marketers consider inviting PR agencies to brand-level pitches.

公关代理商除了在公关专业领域上的优势之外，受访者普遍认为公关代理商对于企业及品牌的理解更有深度，相较于其他类型代理商，其更能够从全局的角度来思考规划整体的品牌传播策略及媒体整合运用。这也是品牌主为何会考虑邀请公关代理商进入到品牌层级比稿的重要原因。

为什么不考虑邀请公关代理商 Why not invite PR agencies



为什么会邀请公关代理商 Why invite PR agencies



Note: Marketers interviewed 2020 (121), data in %

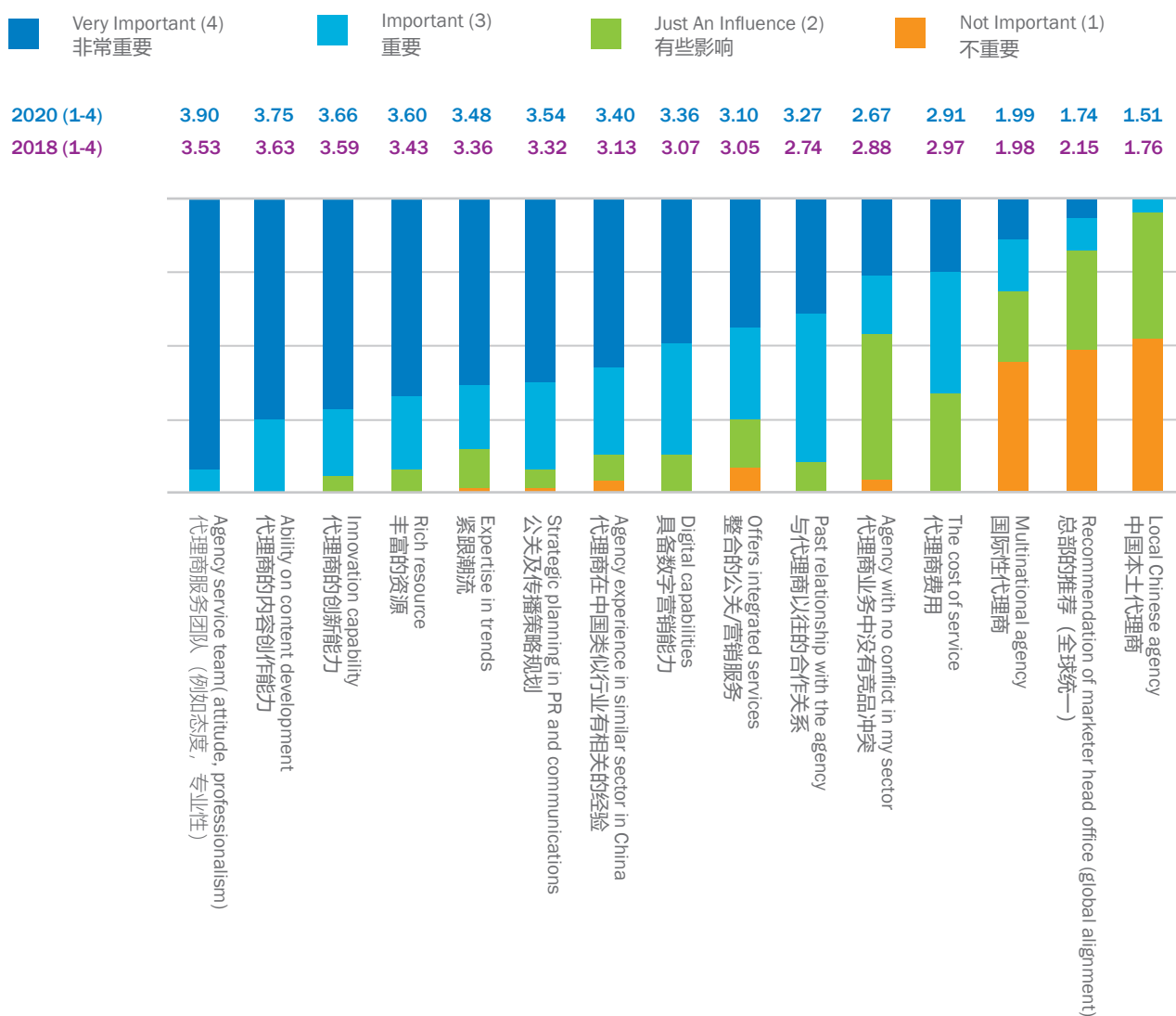
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INTERNATIONAL AGENCIES ARE INNOVATIVE WHILE LOCAL AGENCIES ARE DIGITAL SPECIALISTS

In the selection of partners, the most critical factors are still the professional ability and attitude, strategic ability, innovation ability and resources of the service team. The consensus on these standards has risen since 2018.

在甄选合作伙伴时，最关键的考量因素仍然是服务团队的专业能力与态度，策略能力，创新能力，资源的丰富性等，这些标准的重要性相较于2018年也更明晰。

IMPORTANCE OF PR AGENCY SELECTION CRITERIA 选拔公关代理商标准重要性



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MARKETERS STILL RELY ON AGENCIES FOR MEDIA RELATIONSHIPS

Media resources and relationships (22.44%), in-depth understanding of the brand (17.78%), content control (15.56%), and talent strength (entry threshold) (13.33%) are the biggest advantages of PR agency recognized by marketers.

媒体资源与关系 (22.44%), 对品牌的深入理解 (17.78%), 内容把控力 (15.56%), 人才实力 (入职门槛) (13.33%) 是品牌主公认的公关代理商的最大优势。

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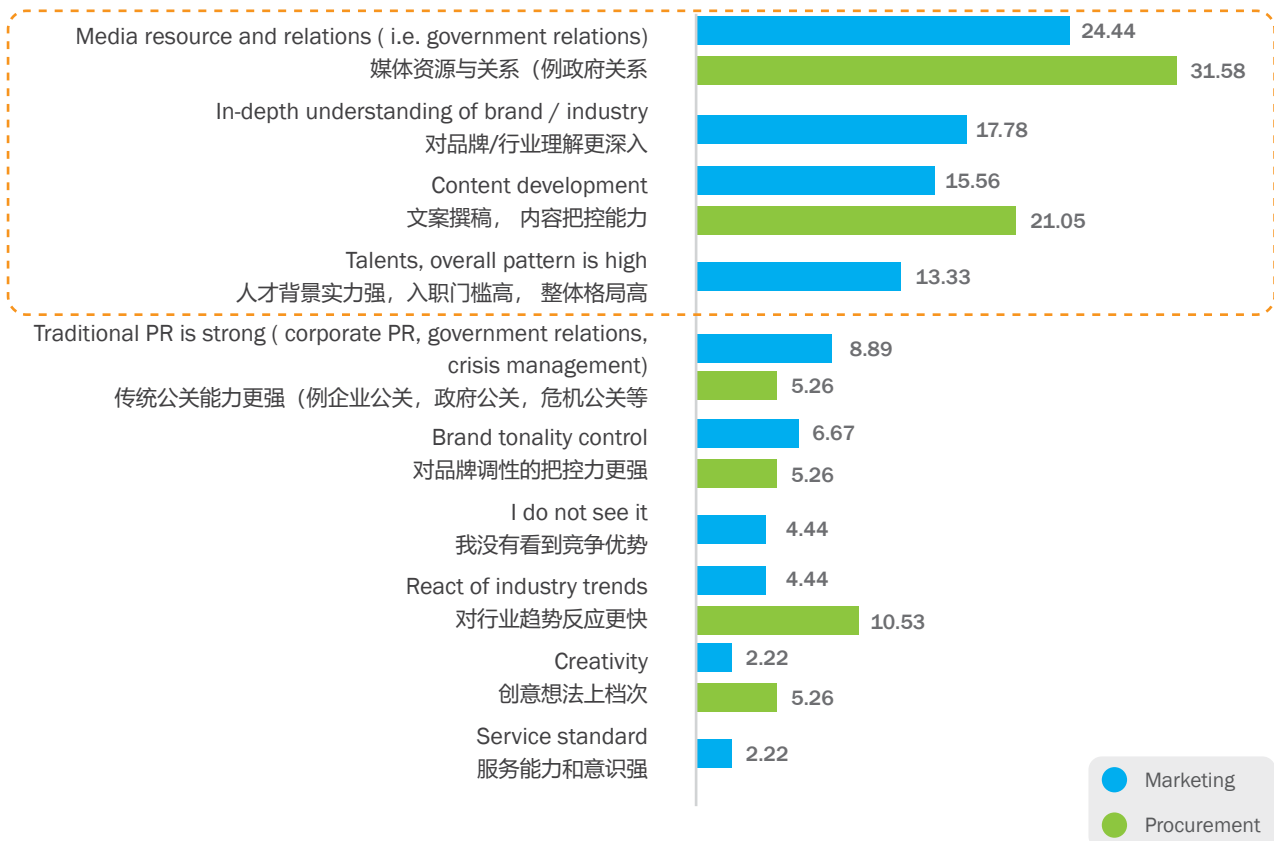
PROCUREMENT SEE PR AGENCIES AS GATEKEEPERS TO MEDIA AND CONTENT

For procurement, media resources and relationships (31.58%) and content control (21.05%) were the biggest advantages of PR agencies.

对于采购来说, 媒体资源与关系 (31.58%), 内容把控力 (21.05%) 才是他们认为最大的优势。

BASED ON YOUR EXPERIENCE AND UNDERSTANDING, COMPARED TO OTHER TYPES OF AGENCIES WHAT MAKES PR AGENCIES STAND OUT IN THE MARKET?

就您的经验及认知来评估, 您觉得公关代理商与其他类型的代理商相比, 竞争优势体现在哪些地方?



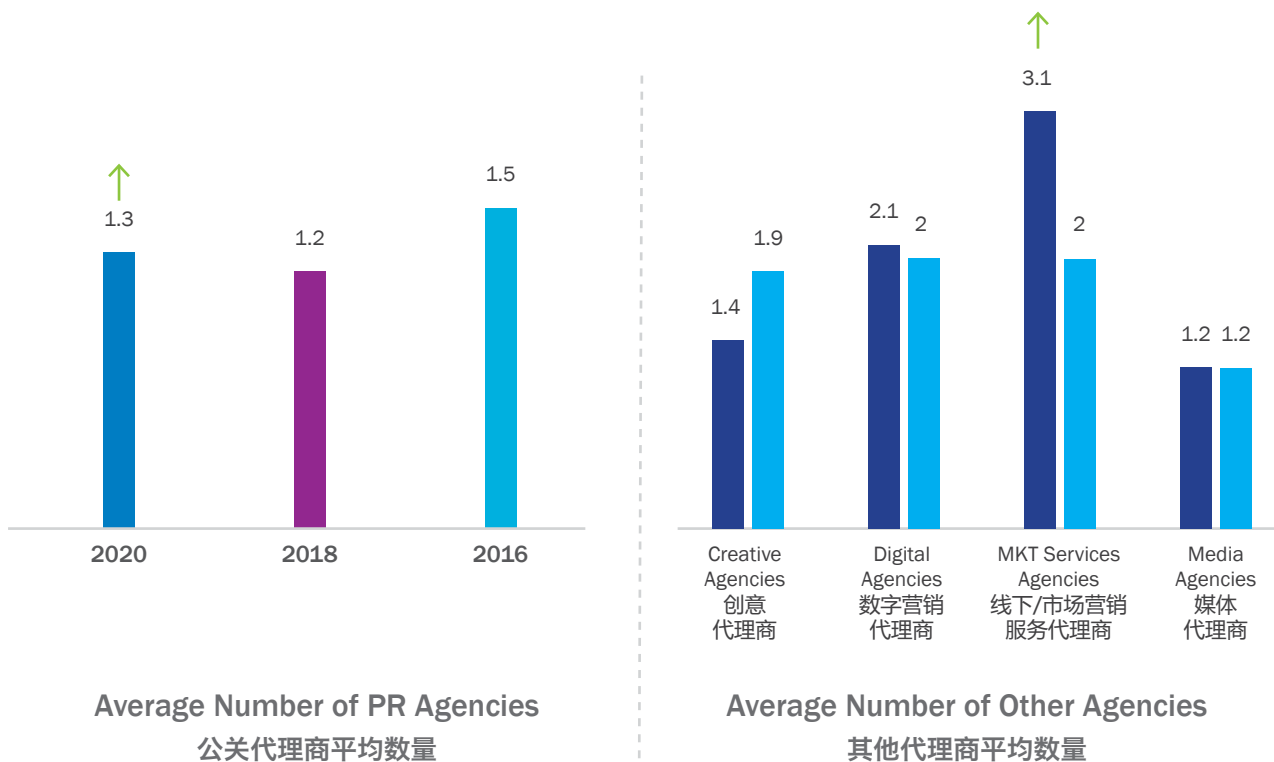
Note: Marketers interviewed 2020 (121), Procurement interviewed 2020 (22), data in %

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PARTNERSHIPS WITH PR AGENCIES ARE LASTING LONGER

In terms of the average number of roster PR agencies, there was a slight increase compared with 2018. Service duration increased by a whole year. In terms of the form of partnerships, lead agency roles increased by 15%.

从平均合作公关代理商数量来看，相较于2018年，有略微提升；从合作时长来看，平均上升一年；从合作形式来看，领导性合作方式提升了15%左右。整体来看公关代理商与受访客户的粘性更高。



Note: Client-Agency relationships in PR Scope 2020 (139), 2018 (176), 2016 (232). Data in % and Average.

Client-Agency relationships in Agency Scope 2020: Creative (287), Digital (151), MKT Services (67), Media (107). Data in % and Average.

METHODOLOGY

UNIVERSE 大数据

Our Universe comprises of all senior marketers who are responsible for PR / Communications in China. Their companies must be currently working with at least one PR agency in China, and 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. All participants 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 collectively were approached by our interviewers.

我们的大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。他们所在的公司就现阶段，必须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R3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 / 样本

121 individuals working in 109 companies with 139 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: Procurement (22 individuals) and Agency professionals (80 individuals).

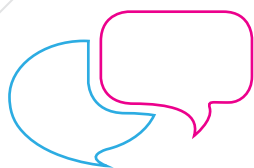
我们针对109家公司的121位客户的139个客户-公关代理商关系进行分析。除了客户公司的市场营销部门，我们也采访了以下专业人士以确保研究的完整性：采购主管（22人）代理商同仁（80人）。



QUESTIONNAIRE / 问卷

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.

半结构式的问卷与开放式的问题允许受访者提供更深入的意见。所有涉及到每个订阅代理商的引述，都将包含在单独为订阅代理商准备的机密报告中。



TYPE OF INTERVIEW / 访谈形式

Senior Marketers or Procurement did phone/ face-to-face interviews. Online interviews were conducted to interview agency professionals.

针对资深市场管理层或采购专业人员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代理商同仁。



DATES OF FIELDWORK / 调研阶段

Interviews with marketers and procurement were conducted from June to August 2020. Interviews with agency professionals were conducted from July to August 2020.

在2020年6-8月期间，我们进行了市场主管/采购主管的访谈。在2020年7-8月期间，我们进行了代理商同仁的访谈。

SAMPLE PROFILE 访谈概况

MARKETERS INTERVIEWED 受访市场主	2020	2019	2017	2015
Marketers on PR agencies (individual) 受访客户人数	121	152	155	143
Client-Agency relationships analyzed 受访客户与公关代理商关系	139	176	232	215
OTHER PROFESSIONALS INTERVIEWED 其他受访的专业人士	2020	2019	2017	2015
Procurement (individual) 采购主管	22	32	28	29
Senior Professionals working in PR agencies 资深公关代理商同仁	80	59	62	69

INTERVIEWEE PARTICULARS: MARKETERS

受访者信息：市场主

GENDER 性别	2020	2018	2016
Male 男	75.3	38.8	30.3
Female 女	24.7	61.2	69.7

POSITION 职位	2020	2018	2016
President, CEO, GM 总裁，首席执行官，总经理	1.3	5.3	4.5
PR/Media Relations Director 公关/媒体关系总监	16.9	9.9	14.2
PR/Media Relations Manager 公关/媒体关系经理	19.5	44.7	31.6
Marketing Director 市场总监	14.3	9.2	10.3
Marketing Manager 市场经理	7.8	22.4	14.2
Brand Director 品牌总监	2.6	4.6	7.1
Brand Manager 品牌经理	13.0	8.6	14.2
Others 其它	7.8	8.6	3.9

CITY 受访者地区分布	2020	2018	2016
Shanghai 上海	71.4	50.0	52.3
Beijing 北京	18.2	25.7	34.8
Guangdong 广东	9.1	13.2	7.1
Other 其它	1.3	11.1	5.8

TENURE (AVERAGE YEARS) 任期（平均年数）	2020	2018	2016
Current Position 当前职位	4.4	4.01	4.02
Current Company 在该公司任职	4.7	5.08	3.75

ROLE 职责	2020	2018	2016
Director Above 总监级别或以上	42.9	26.3	36.1
Middle Management 非总监级别	57.1	73.7	63.9

Note: Marketers interviewed 2020 (121), 2018(152), 2016(155), data in %

A SELECTION OF PARTICIPATING COMPANIES

A TOTAL OF 109 COMPANIES INTERVIEWED



BALENCIAGA

Club Med



OMRON

AMOREPACIFIC

JB
BLANCPAIN

faurecia



H3C



MHD
MOËT HENNESSY DIAGEO



Lenovo



ORIS
HÖLSTEIN 1904

BORDER X LAB



BREITLING
1884

VISA



IMAX

VACHERON CONSTANTIN
GENÈVE



CORNING

medidata

SAINT LAURENT



ANALYZED PR AGENCIES

GOLINMAGIC

Trends

Hill + Knowlton
Strategies



Ogilvy

RED BRIDGE

**FLEISHMAN
HILLARD**

**SWITCHING
TIME**

恒瑞行传播集团
HRH Communications Group

**The Hoffman
Agency**

burson cohn & wolfe
bcw



@comm

Edelman

MSL
Influence. Impact.

DRD4

**WEBER
SHANDWICK**
engaging always.

ACTIVATION GROUP

ruder + finn

dentsu

**REO
ADVERTISING**



UTOP
友拓传播机构

APAX Group
川力企划

shunya®

SPRG
STRATEGIC PUBLIC RELATIONS GROUP

APCO
worldwide®

HighTeam

MR
MARKETING
RESOURCE GROUP
嘉利公关

HighTeam

BRUNSWICK

**DEVRIES
GLOBAL**

ABOUT R3

OUR REASON FOR BEING

In a word, we are about transformation. R3 was established 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 want to help CMOs make marketing accountable.

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 the US, Asia Pacific and Europe and partners in LATAM and Africa.

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



WHAT WE DO

We are an independent transformation consultancy hired by CMOs to make their marketing more measurable and accountable to business impact.



HOW WE DO IT

- We invest in the best talent, bringing in senior leaders from marketing, agency and analytic backgrounds.
- We're independent. Because we're not your marketing team or agencies, we're empowered to be honest and transparent.
- We use external benchmarks. We have proprietary data pools to inform our in-depth analysis.
- 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.
- We have co-developed software to measure agency and media performance.
- Each month, we exclusively track over 500 agency new business wins, as well as 100's of deals in the marketing M&A space.
- We have insight into global best practice. We work with companies who want to do best-in-class marketing across diverse categories and geographies.
- We authored the book "*Global CMO*" about marketers leading Digital Transformation around the world.
- We maintain an ongoing database of media costs for key markets.

DRIVING TRANSFORMATION FOR MARKETERS AND 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

Using a bespoke and proprietary methodology, we help benchmark and provide insights into how your digital strategies perform in your category and across categories.

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