CHINA AGENCY SCOPE 2016

中国营销趋势研究

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

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R3 WORLDWIDE

SCOPEN

METHODOLOGY 方法论

1 UNIVERSE 研究概述

Our 2016 Survey comprises marketing leaders responsible for: marketing, communications and advertising in China. Each respondent's company must be currently working with at least one creative or media agency in China. The professionals 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 creative, media, digital and marketing service agencies on an on-going basis. In addition to R3-SCOPEN's own database, the leading China agencies were asked for a list of their most important clients, who were collectively approached by our interviewers.

2016年度的研究对象为中国市场营销、传播与广告行业的市场营销领导者。每位受访者的公司都必须与至少一家中国创意或媒体代理商正在合作。每家公司的受访者必须直接参与，选择代理商和核准代理商的决策过程。他们必须与创意、媒介、数字和线下市场营销服务代理商有着长期的互动。除了R3和SCOPEN的自有数据库之外，中国首屈一指的代理商们也提供了其重要客户的名单，此次研究中涵盖了对于这些客户的访谈。

2 SAMPLE 研究样本

405 individuals working in 251 companies with 703 client-agency relationships were part of our analysis (creative agencies: advertising, marketing services and digital, as well as media agencies). In addition to individuals in marketing departments of client companies, we also interviewed: agency professionals (242 individuals), Trade Press Editors (14 individuals) and Procurement Directors (28 individuals).

本次研究的样本来自于251家公司的405位专业人士，703个客户/代理商关系（创意代理商：创意广告、线下市场营销服务、数字以及媒介代理商。除了客户公司的市场营销专业人士，我们还采访了：代理商专业人士（242人）、行业刊物编辑（14人）和采购总监（28人）。

Sample Profile 访谈概况

Number of Interviews and Relationships 访谈量与关系

MARKETERS INTERVIEWED 受访客户	# INTERVIEWS 访谈量		
	2012	2014	2016
Marketers on Advertising agencies 受访客户与创意广告代理商关系	215	261	225
Marketers on Marketing Services agencies 受访客户与线下市场营销服务代理商关系	87	110	70
Marketers on Digital agencies 受访客户与数字营销代理商关系	85	182	121
Marketers on Media agencies 受访客户与媒体代理商关系	165	203	195
CLIENT-AGENCIES RELATIONSHIPS ANALYSED 客户与代理商关系分析	**# RELATIONSHIPS 关系数量**		
	2012	2014	2016
Marketers on Advertising agencies 受访客户与创意广告代理商关系	323	314	263
Marketers on Marketing Services agencies 受访客户与线下市场营销服务代理商关系	68	157	88
Marketers on Digital agencies 受访客户与数字营销代理商关系	185	243	150
Marketers on Media agencies 受访客户与媒体代理商关系	274	230	202
OTHER PROFESSIONALS INTERVIEWED 其他受访的专业人士	**# INTERVIEWS 访谈量**		
	2012	2014	2016
Senior Professionals **working in Creative, Media and Digital agencies** 资深代理商创意、媒体或数字营销专业人士	268	294	242
Trade Editors **on Creative, Media and Digital Agencies** 行业杂志编辑对创意、媒体、数字营销代理商的看法	15	15	14
Procurement 客户方的采购部人员	*	29	28

3 QUESTIONNAIRE 研究问卷

The methodology used a semi-structured questionnaire: a mix of predetermined and open-ended questions allowing interviewees to provide in-depth answers and opinions. The average duration of these interviews was 55 minutes.

本次研究采用半结构式问卷，结合封闭式问题及开放式问题，使受访者能够深入解答并提供意见。采访的平均时长为55分钟。

4 TYPE OF INTERVIEW 采访类型

Face-to-face interviews were held using a closed questionnaire (with CMOs). 60% of interviews were done face-to-face in the offices of the respondent client companies.
On-line interviews were conducted to interview agency professionals and procurement.

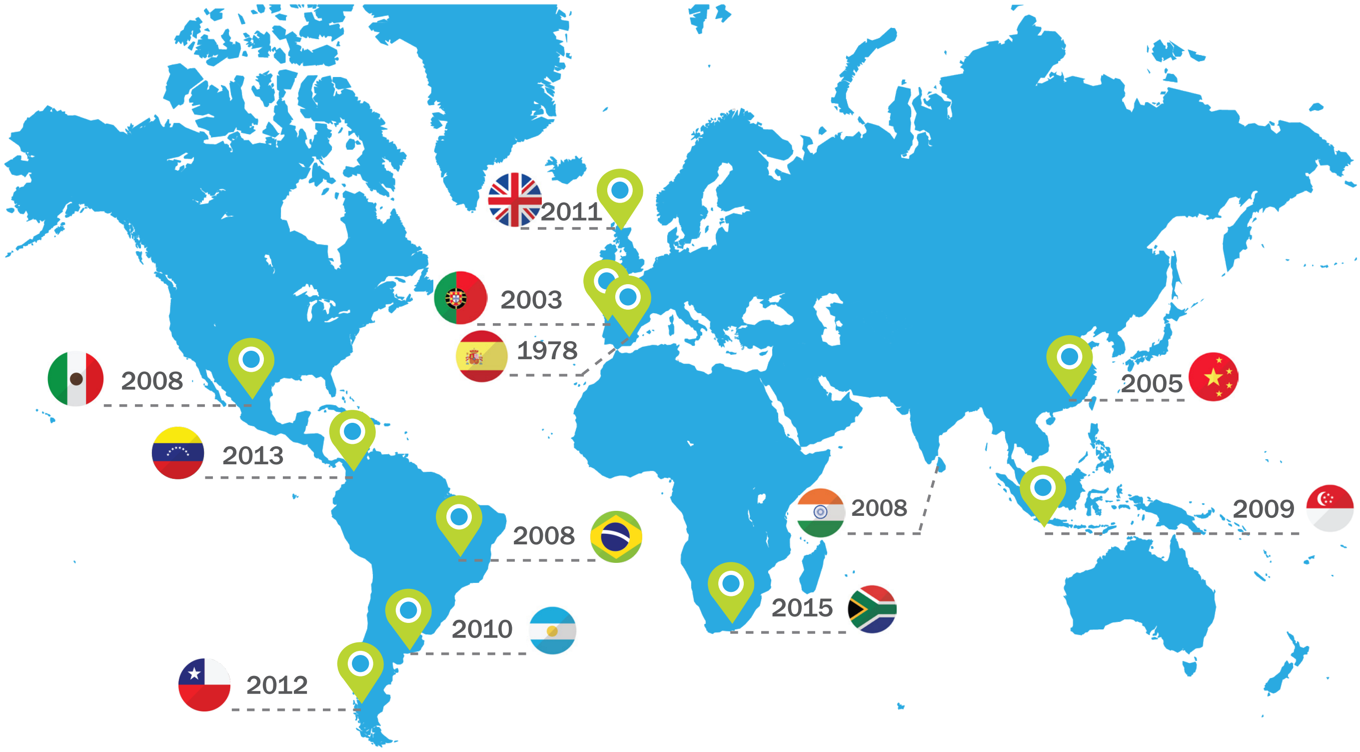
采用封闭式研究问卷进行面对面采访（对象为首席营销官）。60%的采访在受访客户公司内完成。
在线采访用于代理商专业人士和采购部。

5 DATES OF FIELDWORK 采访日期

Interviews with marketers were conducted from September to December 2015.
Interviews with Procurement Directors, agency professionals and trade press were conducted from December 2015 to January2016.

市场营销专业人士受访日期：2015年9月 - 12月。
采购总监、代理商专业人士及行业刊物编辑受访日期：2015年12月 - 2016年1月。

AGENCY SCOPE AROUND THE WORLD
营销趋势研究在全球范围的开展



PROFILE OF MARKETERS INTERVIEWED
受访广告主概况

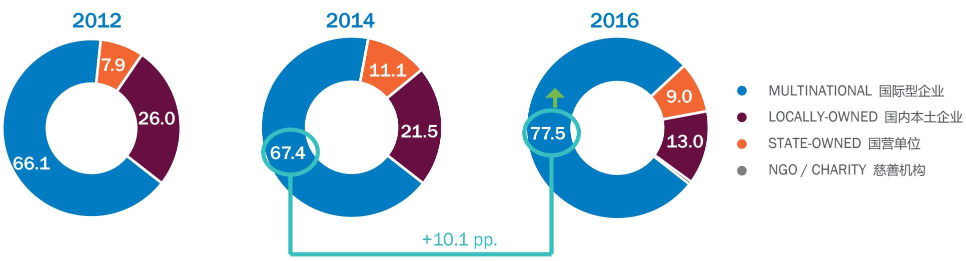
1 PROFILES OF COMPANIES BY OWNERSHIP STRUCTURE
受访公司性质

The 2016 survey covered a broad spectrum of 251 companies with a strong focus on multinational marketers, who accounted for 77.5% of all respondents. In this edition we had more than 20 Chinese born companies that identified themselves as multinationals in 2016 due to their international scale and operations.

2016年度研究涵盖251家公司，重点关注跨国企业，占受访总数的77.5%。其中，有20多家国内本土企业，介于其全球业务及企业规模，称其为跨国企业。

Sample Profile 访谈概况

Type of Company 公司分类



Most of our interviewees were from multinational companies (77.5%). The number of multinational companies has increased by 10.1 perceptual points compared with 2 years ago. The percentage of locally-owned companies in the sample is very similar to 2014. The percentage of state-owned companies has been reduced.

多数的受访者来自于国际型企业（77.5%），与两年前比较国际企业的数量增加了10.1个点。国内本土企业的受访情况与2014年相似。国营企业有所减少。

MARKETERS 2012: 215, 2014: 261 AND, 2016: 405. DATA IN %.

2 PROFILES OF COMPANIES BY TURNOVER AND MARKETING BUDGET
受访公司的营业额和营销预算分布

Respondents were drawn from different sized companies, with 40% of respondents managing a marketing budget of RMB 100m or larger.

受访者来自不同规模的公司，40%的受访者所管控的营销预算至少在1亿人民币左右。

Sample Profile 访谈概况

Marketing Budget/Company Turnover Ratio 公司营业额与市场营销预算

Company Turnover 公司营业额（RMB 人民币）	2016
Below RMB 100M / < 1亿以下	1.5
From RMB 101M – 500M / 1亿1百万 – 5亿	4.2
From RMB 501M - 1B / 5亿1百万 – 10亿	4.4
From RMB 1B – 3B / 10亿 – 30亿	10.1
From RMB 3B – 5B / 30亿 – 50亿	7.9
Above RMB 5B / 50亿以上	43.0
Refused 拒绝回答	28.9
AVERAGE (Million RMB) 平均（百万 人民币）	3,814.00

Marketing Budget 市场营销预算（RMB 人民币）	2016
Below RMB 5M / < 500万以下	1.7
From RMB 5M – 10M / 500万 -1千万	3.5
From RMB 10M – 20M / 1-2千万	6.7
From RMB 20M – 50M / 2-5千万	9.6
From RMB 50M – 80M / 5-8千万	4.9
From RMB 80M – 100M / 8千万-1亿	6.2
Above RMB 100M / > 1亿	40.0
DOES NOT SPEND 不投入	27.2
AVERAGE (Million RMB) 平均（百万 人民币）	73.7

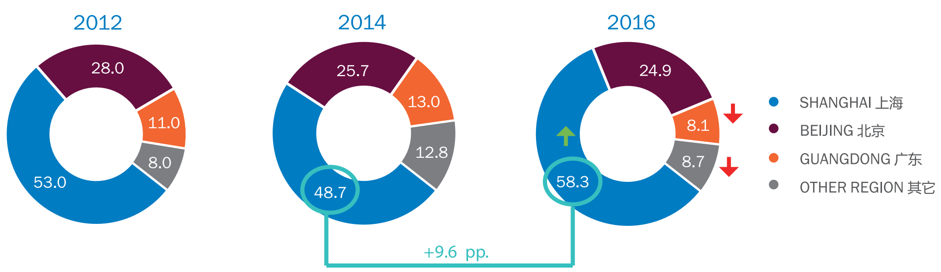
MARKETERS 2016: 405. DATA IN % AND AVERAGE.

Marketing Budget/Turn-over ratio: 1.93%

3 PROFILES OF COMPANIES BY GEOGRAPHY
受访公司的地理分布

Interviews were conducted in three major cities: Beijing, Shanghai and Guangzhou. 58.3% of respondents were based in Shanghai, reflecting the city's commercial importance.

采访地点为三大城市：北京、上海和广州。58.3%的受访公司位于上海，这体现出上海在商业市场的重要地位。



Sample Profile 访谈概况

City Location 受访者地区分布

58.3% of the interviews were conducted in Shanghai (9.6 perceptual point increase compared with 2014); Beijing represents 24.9% and the rest of the interviews were conducted in Guangdong (8.1%) or in other regions in China (16.8%).

58.3%的访谈是在上海进行（与2014年相比，积累了9.6个点）。24.9%的访谈在北京进行，8.1%在广东和16.8%在国内其它城市。

MARKETERS 2012: 215, 2014: 261 AND, 2016: 405. DATA IN %.

4 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. 66.2% operate at the Director level, with 43.8% 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，以确保研究的平衡。66.2%的受访者为总监级别，43.8%的受访者为营销总监/经理。

Sample Profile 访谈概况

Interviewee Particulars 受访者信息

Position 职位	2012	2014	2016
PRESIDENT, CEO, GM 总裁，首席执行官，总经理	4.7	6.1	7.2
MARKETING DIRECTOR / MANAGER 营销总监 / 市场经理	40.5	29.6	43.8
MEDIA DIRECTOR 媒体总监	2.8	0.8	6.4
GROUP BRAND MANAGER 集团品牌经理	34.9	49.1	21.8
E-COMMERCE / DIGITAL DIRECTOR / MANAGER 电子商务总监 / 数字营销总监 / 经理	6.0	1.6	6.4
ADVERTISING DIRECTOR 广告总监	1.4	1.9	1.2
COMMUNICATIONS DIRECTOR 传播总监	3.7	2.1	2.0
TRADE MARKETING DIRECTOR 市场渠道营销总监	2.3	4.0	6.4
OTHER 其它	3.7	4.8	4.8

Role 职责	2012	2014	2016
DIRECTOR & ABOVE 总监级别或以上	56.7	40.0	66.2
MIDDLE MANAGEMENT 非总监级别	43.3	60.0	33.8

Gender 性别	2012	2014	2016
MALE 男	52.1	–	43.5
FEMALE 女	47.9	–	56.5

Tenure (average years) 任期（平均年数）	2012	2014	2016
CURRENT POSITION 当前职位	3.50	3.82	4.77
CURRENT COMPANY 在该公司任职	4.70	5.32	5.96

MARKETERS 2012: 215, 2014: 261 AND, 2016: 405. DATA IN % AND AVERAGE.

5 PARTICIPATING MARKETERS
参与访谈的广告主

Sample Profile 访谈概况

251 companies interviewed. 150 (60%) agreed to be included as participants

251家被访企业，150（60%)家企业同意公开

10 KEY TRENDS & BEST PRACTICE
十大主要趋势与最佳实践

The R3-SCOPEN 2016 Agency Scope Study focuses on the TRENDS of the Advertising Industry and the PERCEPTION and PERFOR- MANCE of agencies in China. We interviewed 405 marketing leaders responsible for: marketing, communications and advertising in China, working across 251 different companies, managing 703 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.

R3-SCOPEN《2016年中国营销趋势研究》重点关注广告行业的发展趋势，针对中国代理商的看法及表现评估，共采访了405位营销领导者，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251家不同公司，管理着703个广告主-代理商关系。本文将着重说明该关系的十大主要趋势，详细报告则包含更多细节。我们还总结了最佳实践的建议，旨在帮助广告主及其代理商抓住这些趋势，得到进一步的提升。

25.4 % of marketing budget now spent on digital media. This has had a major impact on internal marketing team structures, budget allocation, creative platforms and data analytics. But ATL continues to take a fair slice of the marketing budget. For marketers and their agencies, this means even more diverse and fragmented ways to communicate with consumers. Given the complexity of the market, marketers are developing relationships with fewer and more trusted agency partners and sticking with them for longer. Marketers work with an average of 6.4 agency partners (down from 8.2 agencies in 2014), and the average relationship is 3.8 years (up from just over 3 years in 2014).

目前，25.4%的营销预算用于数字媒体。这对内部营销团队结构、预算分配、创意平台和数据分析具有重大影响。但传统媒体仍占据不小的营销预算。对于广告主及其代理商而言，这意味着更多样、更分散的消费者沟通方式。鉴于市场的复杂性，广告主倾向与少数且更值得信赖的代理商合作，以建立并保持更长期的合作关系。广告主的合作代理商平均数量为6.4个，比2014年的8.2个有所下降，平均合作时间则为3.8年（超出2014年的3.35年）。

87.1% of strategic development is led in-house, with 64.1% of marketers saying their preferred ideal agency model is a one-stop-integrated agency partner that can meet all their communication needs. Yet relatively few marketers have gone down this route, opting instead to strengthen internal resources to manage their communications and agency relationships. Agencies in turn continue to strengthen their offerings; hence, they are rewarded with longer and more stable contracts as a result.

87.1%的策略制定工作由客户内部主导，64.1%的广告主表示，他们理想中的代理商模式是能够满足其全部传播需求，一站式的代理商合作伙伴。不过，真正能够选择该模式的广告主相对较少，大多数广告主会转而通过强化内部资源，从而有效管理与代理商之间的沟通传播。相应地，代理商则应继续强化服务范围，来赢得更长久稳定的合作。

Creativity/innovation scored by 67.3% of marketers as their key requirement when drawing up an advertising agency shortlist, with market knowledge, strength of agency network, transparency and value for money all having high scores.

67.3%的广告主将创意/创新作为拟定创意广告代理商入选名单的关键要求，其中市场知识的掌握、代理商网络的优势、透明度和物有所值均获得了较高的评分。

Procurement is involved in 70.7% of agency negotiations, most often leading with marketing in the negotiations with agency partners.

70.7%的代理商谈判采购部都有参与，大多数情况下，采购部与市场部共同协商选择代理商。

Finally, we asked respondents what challenges they think they face in the future. For marketers, 35.2% saw the challenges coming from informed consumers with new habits and 23.5% from media diversity and multi-channels. 29% of respondents said the top challenges facing creative agencies will be delivering bigger creative ideas and better understanding of the market and consumers. The main challenges facing media agencies will be understanding different communication platforms and channels, mentioned by 37.8% of respondents, followed by 28.9% better understanding of digital and 27.4% proving ROI effectiveness, results and metrics.

最后，我们询问受访者，他们认为未来会面临哪些挑战。35.2%的广告主认为挑战来自于已经被大量信息充满的消费者以及新的消费习惯，23.5%的广告主认为挑战来自媒体的多元化和多渠道。29%的受访者表示，创意代理商面临的最大挑战是提供更出色的创意概念，并更好地了解本土市场与消费者。37.8%的受访者表示，媒介代理商面临的主要挑战是了解不同的传播平台和渠道，28.9%的受访者表示主要挑战是洞悉数字营销的趋势，27.4%的受访者表示关键在于提供ROI有效性、结果与衡量指标。

10 KEY TRENDS 十大主要趋势

1. Digital media takes 25.4% of Chinese marketing budgets.

   数字媒体开支占中国营销预算的25.4%。

2. Best-in-class specialist agency model predominates, but two thirds of marketers would choose an integrated agency model if it met their needs.

   专项型代理商模式占据着主导地位，但三分之二的广告主希望在将来选择整合型代理模式，前提是该模式能够满足其需求。

3. Marketers have on-going relationships with an average of 6.4 agency partners, down from over 8.2 agencies in 2014.

   持续合作的代理商数量从2014年平均8.2个降至6.4个。

4. Agencies appointed for longer, with the average relationship now 3.8 years, up from just over 3 years in 2014.

   广告主与代理商合作时间有所延长，从2014年的3.35年至现在的3.8年。

5. Agency partners are highly valued but in-house resources are taking the lead role across 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。

6. Most marketers are satisfied with their current agency partners but a third might occasionally consider a pitch.

   大多数广告主对其当前的合作代理商感到满意，但三分之一的广告主仍经常进行比稿。

7. 67.3% of marketers score creativity/innovation as their most demanded characteristic of their ideal advertising agency.

   67.3%的广告主认为创意/创新是理想的创意广告代理商该具备的首要特质。

8. Agency pitch is still the most popular process for selecting a new agency partner, but pitches often lack tailor-made ideas.

   比稿仍是广告主挑选新合作代理商时最受欢迎的方式，但代理商展示的提案演示往往缺乏量身定制的内容。

9. Fee / retainer and project basis is most used agency remuneration model.

   服务费用/年费和按项目计费是最常使用的报酬模式。

10. Client procurement teams are involved in 70.7% of creative agency negotiations and 69.4% of media agency negotiations.

    70.7%的创意代理商谈判以及69.4%的媒介代理商谈判，客户采购部皆有参与。

TOP 10 KEY TRENDS AND BEST PRACTICE SUMMARY
十大主要趋势与最佳实践总结

1 DIGITAL MEDIA TAKES UP TO 25.4% OF CHINESE MARKETING BUDGETS.
数字媒体开支占中国营销预算的25.4%。

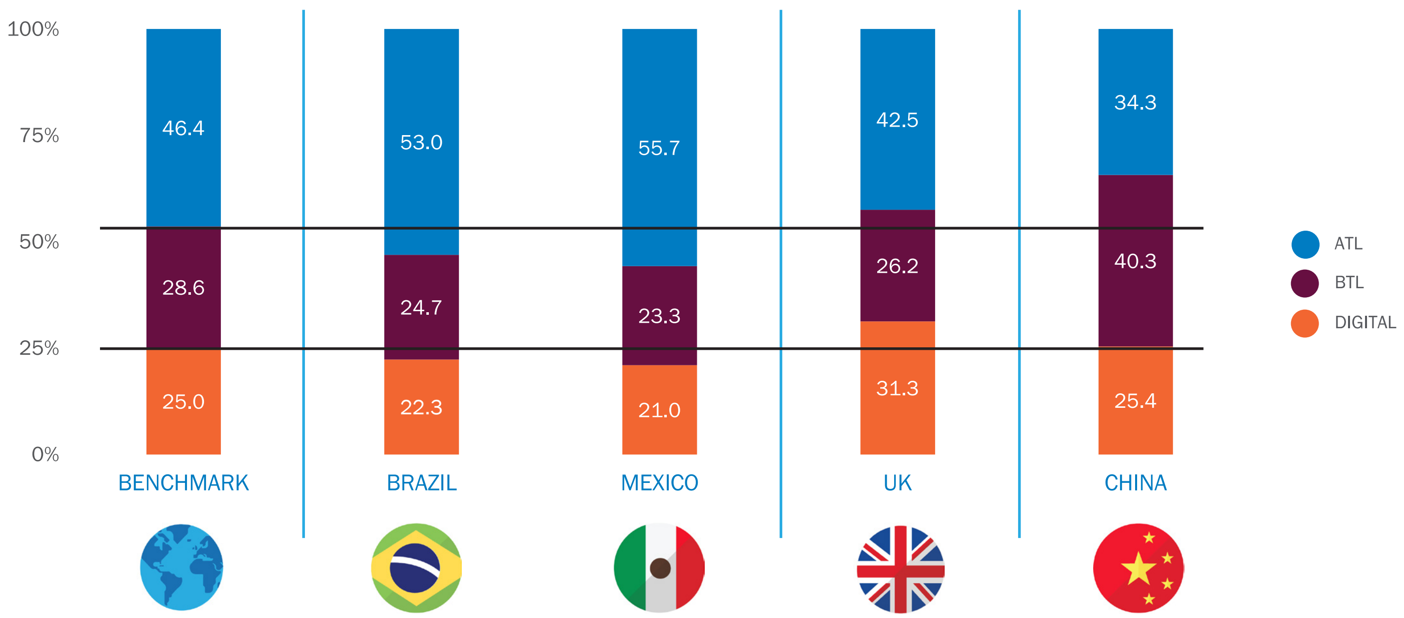
Spending on digital marketing now accounts for 25.4% of the average marketing budget, up from 18.6% two years ago. Below-the-line continues to perform strongly, accounting for 40.3% of the budget – putting pressure on ATL spending which has seen its share of marketing budgets cut from 35.9% two years ago down to 34.3% in 2016.

But China still lags behind markets such as the UK where digital now takes 31.3% of marketing spending, which means even stronger growth potential over the next couple of years.

目前，数字营销开支占平均营销服务预算的25.4%，比两年前的18.6%有所提高。线下市场营销服务表现依然强劲，占预算的40.3%，这使传统广告面临压力，后者的开支从两年前的35.9%削减至2016年的34.3%。

但中国仍然落后于英国等市场，数字媒体在这些市场占营销开支的31.3%，这意味着接下来的几年内仍有更大的发展潜能。

Market Trends 市场趋势
Marketing Budget 市场营销预算



MARKETERS 2014 (BRAZIL), 2015 (MEXICO, UK) AND 2016 (CHINA). DATA IN %.

R3-SCOPEN BEST PRACTICE 最佳实践

Measuring marketing ROI seems to have been pushed down a little on the list of marketers' priorities as they struggle to manage the massive amount of 'big data' generated from digital activity. Measuring consumer engagement from a social media campaign seems to be preferred over developing a robust marketing ROI model.

由于广告主竭力管理数字营销活动中生成的大量“大数据”，因此衡量ROI在广告主的优先事项列表中的排名似乎略有下滑。相对开发稳健的营销ROI模型，如今广告主更注重通过社交媒体宣传活动，来衡量消费者参与度。

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广告主面临的重大挑战 — 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制定清晰的业务目标，如何帮助广告主实现这些目标，以及如何设置衡量标准以判断目标实现程度。媒体开支决策应以可靠度为基础。与合作代理商共同设定目标，并将其纳入代理商报酬之中。

2 BEST-IN-CLASS SPECIALIST AGENCY MODEL PREDOMINATES, BUT TWO THIRDS OF MARKETERS WOULD CHOOSE AN INTEGRATED AGENCY IF MET THEIR NEEDS.
专项型代理商合作模式占据着主导地位，但三分之二的广告主希望在将来选择整合型代理商合作模式，前提是该模式能够满足其需求。

The most common agency relationship model, cited by 61% of respondents, is structured around working with multiple best-in-class agencies working in parallel with the marketing team.

61%的受访者提到最常见的代理商关系模式，是围绕多家专项型代理商展开，采取与营销团队平行作业的方式。

The market is moving towards greater integration, with 33.9% of marketers appointing a lead agency to provide direction at brand level and help manage their inter-agency coordination. 6% use an agency model based on a holding company with a sibling agency solution that provides a single agency contract but leverages multiple specialist resources. 4.3% work with a holding company that creates a custom agency to meet their specific needs.

随着广告市场不断整合，33.9%的广告主委任一家主导代理商，负责提供品牌层面的指导，并帮助统筹各代理商之间的协作。6%的广告主采用与集团控股公司所属代理商合作模式，这类集团控股公司设有联合代理方案，提供单一的代理合同，并同时调配所需专家资源。4.3%的广告主则与集团控股公司所属，专门为客户项目而成立的代理商合作模式。

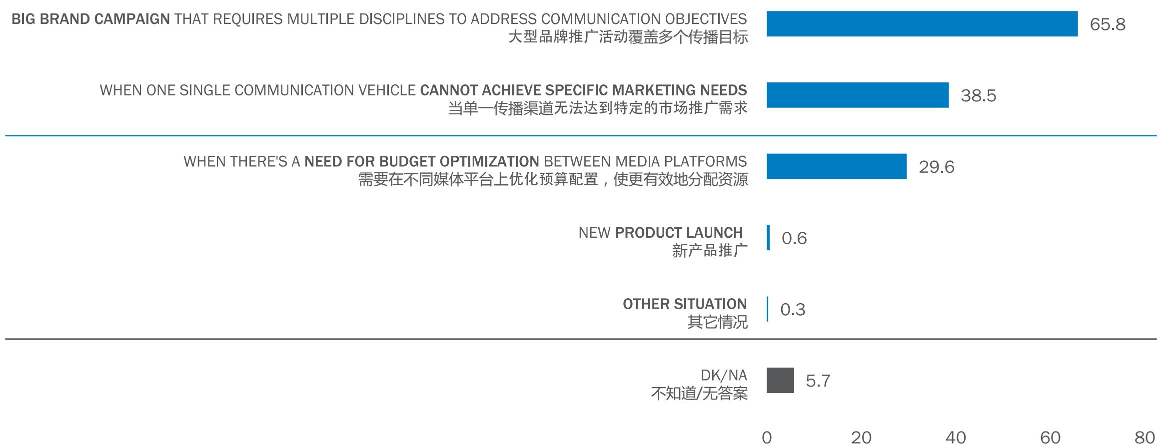
When pressed on their future needs, 64.1% of respondents would choose a fully integrated agency model 'if it met all my communication needs' specifically to deliver a big brand campaign that requires multiple disciplines. Given the already inbuilt complexity of the Chinese market, it's no surprise the preference for an integrated solution is significantly higher amongst Chinese marketers than our global benchmark.

被问及未来的需求时，64.1%的受访者表示他们会选择整合型的代理商模式，“前提是这种模式能够满足我所有的传播需求”，在展开覆盖多个传播目标的大型品牌宣传活动时，尤为如此。鉴于中国市场固有的复杂性，中国广告主对整合型解决方案的偏好并不令人感到意外，他们对这种解决方案的偏好程度远远高于我们的全球基准。

Market Trends 市场趋势

Way of working with agencies (Integration vs. Specialisation)
与代理商的合作模式（整合型与专项代理商比对）

IN WHAT SITUATIONS WOULD YOU WORK IN AN INTEGRATED MODEL WITH YOUR AGENCIES?
在什么情况下您会用整合营销模式与代理商合作？

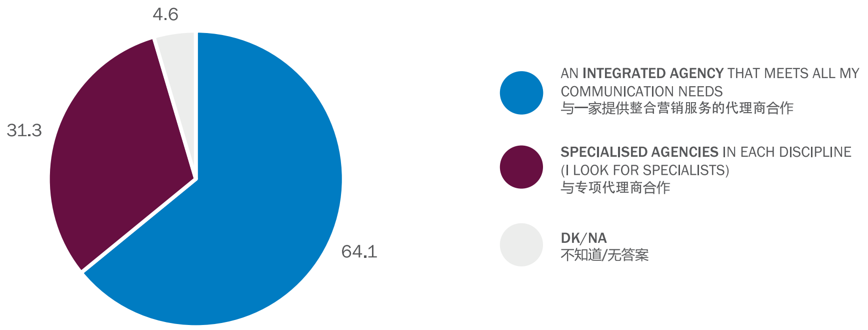


MARKETERS THAT WORK WITH CREATIVE AGENCIES 2016: 351. DATA IN %.

Market Trends 市场趋势

Way of working with agencies (Integration vs. Specialisation)
与代理商的合作模式（整合型与专项代理商比对）

IN THE FUTURE, IF IT WAS YOUR DECISION, WOULD YOU PREFER TO WORK WITH?
如果由您来决定，您认为与哪类代理商合作是最理想的？



MARKETERS THAT WORK WITH CREATIVE AGENCIES 2016: 351. DATA IN %.

Market Trends 市场趋势

Way of working with agencies (Integration vs. Specialisation)
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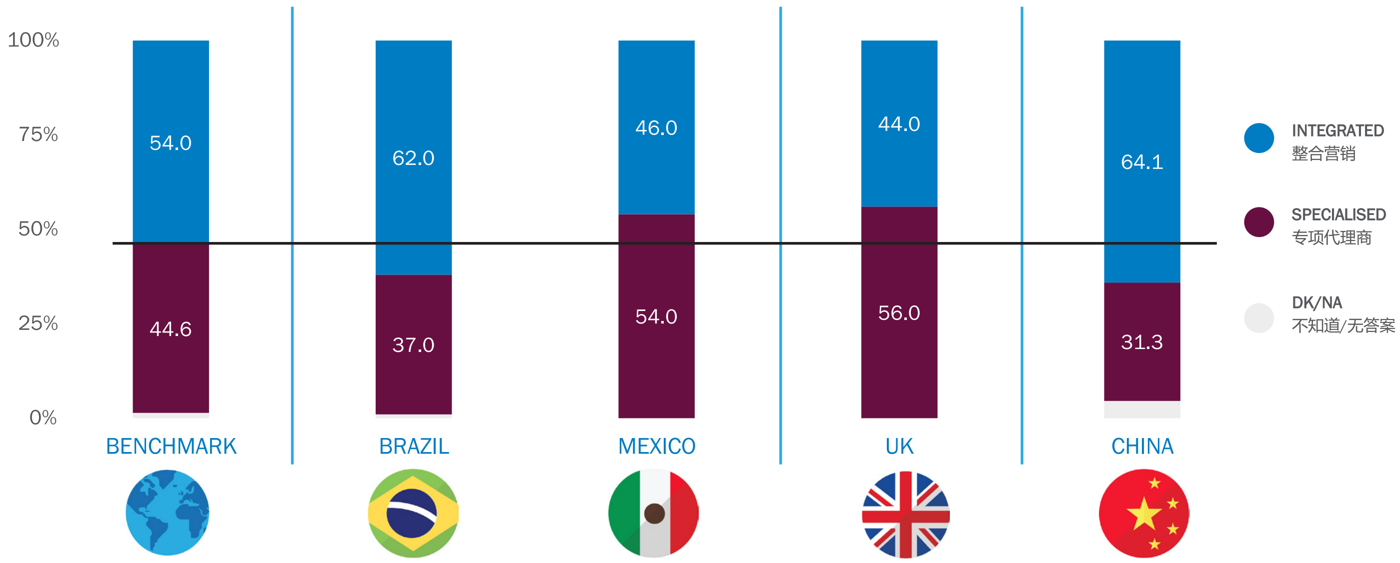


MARKETERS THAT WORK WITH CREATIVE AGENCIES 2014 (BRAZIL), 2015 (MEXICO, UK) AND 2016 (CHINA). DATA IN %.

R3-SCOPEN BEST PRACTICE 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，这种方式通常由广告主推动，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 centralised 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?

评估您现有的代理商模式，进行彻底的内部需求分析，并与利益相关方严格评估公司的内部营销结构。但实际上：高度集中的代理商模式真的符合公司文化吗？它能够带来分散式结构亟需的重点与专业能力吗?

3 MARKETERS HAVE ON-GOING RELATIONSHIPS WITH AN AVERAGE OF 6.4 AGENCY PARTNERS, DOWN FROM 8.2 AGENCIES IN 2014.
持续合作的代理商数量从2014年平均8.2个降至6.4个。

In this latest survey, the number of different agency resource relationships employed by marketers has shown consolidation, suggesting a gradual stabilisation in marketer–agency relationships. Marketers now work with an average of 1.6 advertising agencies, 1.7 marketing services agencies, 2 digital agencies and 1 media agency.

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.

在最新的研究中，广告主合作的不同代理商关系数量有收紧趋势，这表明广告主-代理商关系正趋于稳定。广告主目前合作的创意广告代理商平均数为1.6个，线下市场营销服务代理商平均数为1.7个，数字代理商平均数为2个，媒介代理商平均数为1个。

这是良好的迹象，说明广告主正在与更少数且更有价值的代理商合作伙伴建立更长期的合作关系。证实了代理商应在自身资源及服务范围上加以投资，以满足客户对于整合的需求。

Client–Agency Relationships 客户与代理商关系
Number of Agencies by Marketer 合作过的代理商数量

TYPE OF AGENCIES 代理商分类	# AGENCIES 代理商数量 2014	# AGENCIES 代理商数量 2016
Average Number of Advertising agencies 创意广告代理商平均数量	2.22	1.61
Average Number of Marketing Services agencies 线下市场营销服务代理商平均数量	2.31	1.74
Average Number of Digital agencies 数字营销代理商平均数量	2.48	2.02
Average Number of Media agencies 媒体代理商平均数量	1.20	1.08
TOTAL AVERAGE OF AGENCIES 总计代理商平均数量	**8.21**	**6.45**

MARKETERS THAT WORK WITH CREATIVE AND/OR MEDIA AGENCIES 2014 AND 2016. DATA IN %.

R3-SCOPEN BEST PRACTICE 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.

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.

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

任何良性业务关系的基础都为反馈与衡量提供了机会。这也是R3制定CAPE（客户代理商表现评估）的宗旨，该工具旨在帮助广告主更好地评估每个代理商关系。这种诊断方法是寻找最佳合作伙伴，并淘汰表现不佳的合作伙伴的基本模式。

4 AGENCIES ARE APPOINTED FOR LONGER WITH AVERAGE RELATIONSHIPS NOW 3.8 YEARS, UP FROM JUST OVER 3 YEARS IN 2014. 广告主与代理商合作时间有所延长，从2014年的3.35年至现在的3.8年。

Marketer – agency relationships are lasting longer, further reinforcing the consolidation and maturity in the market. Media agencies come out top with the most stable relationship averaging 4.6 years, followed by advertising agencies with an average 4 year relationship. Digital agencies are the most vulnerable, where the average partnership lasts just 2.7 years.

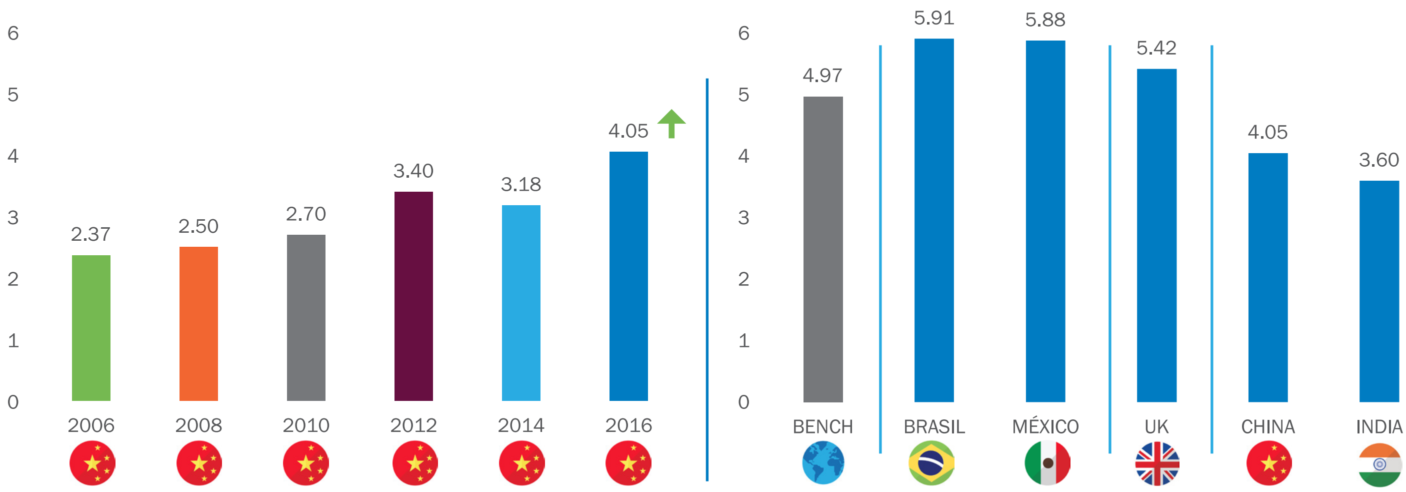
Marketer – agency relationships in China have gradually stabilised over the last decade – when we first started this survey, the average relationship was just 2.3 years – but relationships are still of shorter duration compared to our global benchmark and China still has some way to go to reach global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

广告主-代理商关系更持久，进一步增强了市场的稳定性和成熟度。广告主同媒介代理商的关系最为稳固，平均合作时间为4.6年，其次是创意广告代理商，平均合作时间为4年。广告主同数字代理商的关系最为脆弱，平均合作伙伴关系仅维持2.7年。

在中国，广告主-代理商关系在过去十年中逐步趋稳，我们刚开始开展该研究时，广告主-代理商关系平均仅持续2.3年。即便如此，如今的广告主-代理商关系持续时间相比全球基准仍然较短，表明中国与全球的稳定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 relationship (Advertising agencies) 创意广告代理商合作关系的持续时间



CLIENT-AGENCY RELATIONSHIPS 2014 (BRASIL-MEXICO) 2015 (UK) 2012: 215, 2014: 261 AND 2016: 225 (CHINA) AND 2010 (INDIA). DATA IN %.

R3-SCOPEN BEST PRACTICE 最佳实践

Marketers' increasing length of tenure in their current roles is a major factor in increasing agency stability; our respondents have been in their current positions for an average of 4.7 years and with their current companies, 5.9 years. Both numbers have increased from the 2014 survey.

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.

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

广告主现在任期越来越长，这是代理商趋于稳定的主要因素。我们的受访者在现职的平均任期为4.7年，其在当前公司的平均服务期则为5.9年，相比2014的研究结果均有上升。

通过定期评估代理商，并提供开放且富有建设性的反馈，发展长期合作关系。由代理商以相同的方法评估市场团队，找出潜在的阻碍以建立有效且高效的合作伙伴关系。

面对广告主-代理商合作的新时代，我们最近发现有一种十分有效的方法，即让代理商相互之间进行评估——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

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.

供什么意见？这些措施都是为了更快地提升产出并催生更好的创意。

5 AGENCY PARTNERS HIGHLY VALUED, BUT IN-HOUSE RESOURCES ARE TAKING THE LEAD ROLE ACROSS 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 development, below-the-line, digital strategy and data analytics. 87.1% of respon- dents say strategic planning is led in-house, up from 73.2% in 2014.
64.7% of sales promotion is led in-house as is 53% of digital strategy, 62.9% of data analytics and 43.5% of social media strategy.

In contrast, 88.4% of creative and advertising development resides firmly within advertising agencies and media continues to be led by specialist media agencies, although there is growing in-house involvement in media, with 58.6% of marketers closely involved with media planning and 46.1% leading media buying.

广告主的市场团队在各关键专业领域中，不断参与指导，特别是：策略发展、线下市场营销服务、数字策略及数据分析等领域。87.1%的受访者表示策略策划由广告主内部主导，比2014年的73.2%有所上升。64.7%的促销活动、53%的数字策略、62.9%的数据分析及43.5%的社交媒体策略亦由广告主内部主导。

相比之下，88.4%的创意及广告策划均由创意广告代理商主导，媒体项目仍由专业媒介代理商主导。不过媒体方面，客户公司内部的参与度越来越高，有58.6%的广告主密切参与媒体策划，46.1%的公司会主导媒体购买。

Market Trends 市场趋势

Who does what? 工作分配

	INTERNALLY 内部员工参与	ADVERTISING AGENCIES 创意广告代理商	MEDIA AGENCIES 媒体代理商	BTL/MS AGENCIES 线下市场营销服务代理商	DIGITAL AGENCIES 数字营销	OTHER COMPANIES 其它公司	N/A 不负责	AVERAGE # OF PARTNERS INVOLVED 平均代理商
STRATEGIC PLANNING 策略规划	87.1	57.3	15.1	5.2	14.2	5.6	0.9	1.85
CREATIVITY / ADVERTISING DEVELOPMENT 广告创意	59.5	88.4	10.3	5.2	17.7	1.3	0.9	1.82
TV PRODUCTION 电视广告制作	44.0	77.2	9.1	2.6	1.7	1.7	8.2	1.36
PRINT PRODUCTION 平面广告制作	50.0	79.7	6.5	8.2	3.9	0.9	4.7	1.49
DIRECT MARKETING 直效行销	28.9	8.6	3.9	18.5	12.5	2.2	43.1	0.75 → 45.8
SALES PROMOTION 促销推广	64.7	17.2	7.3	51.7	9.9	2.2	6.0	1.53
MEDIA PLANNING 媒体规划	58.6	6.5	81.9	1.7	10.8	3.0	2.2	1.63
MEDIA BUYING 媒体购买	46.1	2.6	82.8	1.7	11.2	1.3	3.0	1.46

MARKETERS 2016: 405. DATA IN % AND AVERAGE.

Market Trends 市场趋势

Who does what? 工作分配

	INTERNALLY 内部员工参与	ADVERTISING AGENCIES 创意广告代理商	MEDIA AGENCIES 媒体代理商	BTL/MS AGENCIES 线下市场营销服务代理商	DIGITAL AGENCIES 数字营销	OTHER COMPANIES 其它公司	N/A 不负责	AVERAGE # OF PARTNERS INVOLVED 平均代理商
EVENT MARKETING 活动营销	53.4	14.7	6.5	72.4	5.6	6.0	6.5	1.59
DIGITAL STRATEGY AND CONSULTING 数字营销策略与咨询	53.0	15.9	16.8	4.7	71.6	8.2	5.2	1.70
WEBSITES DEVELOPMENT 网站建设	53.4	14.2	2.6	3.4	59.1	9.5	6.9	1.42
DISPLAY / MICROSITES 线上横幅广告/登陆页面	49.6	18.5	15.9	3.0	59.5	7.8	6.9	1.54
SEO 搜索引擎优化	38.8	3.4	29.7	1.3	43.1	7.3	11.2	1.24
SEM 搜索引擎营销	37.9	3.0	30.2	1.7	42.7	7.3	11.2	1.23
SOCIAL MEDIA / E-PR / KOL 社交网路/网络公关 / KOL	43.5	7.8	18.5	3.4	63.4	11.2	6.5	1.48
DATA ANALYTICS 数据分析	62.9	11.6	31.9	12.1	34.1	28.0	4.3	1.81

MARKETERS 2016: 405. DATA IN % AND AVERAGE.

Market Trends 市场趋势

Who does what? 工作分配

	INTERNALLY 内部员工参与	ADVERTISING AGENCIES 创意广告代理商	MEDIA AGENCIES 媒体代理商	BTL/MS AGENCIES 线下市场营销服务代理商	DIGITAL AGENCIES 数字营销	OTHER COMPANIES 其它公司	N/A 不负责	AVERAGE # OF PARTNERS INVOLVED 平均代理商
CRM / E-CRM 客户关系管理	53.4	3.9	5.2	9.9	19.0	15.5	17.7	1.07
MOBILE MARKETING (APPS, DISPLAY) 移动营销 / APP 开发	43.1	11.2	14.7	4.7	59.1	8.6	15.1	1.41
DIGITAL PRODUCTION 数字制作	32.8	14.2	6.5	2.2	67.2	7.8	7.3	1.31
RESEARCH 市场调研	53.4	7.3	8.2	9.9	6.9	59.9	4.3	1.46
BRANDED CONTENT 品牌内容营销	56.9	43.1	22.4	10.3	35.3	9.9	9.1	1.78
E-COMMERCE 电子商务	51.7	4.7	6.9	4.7	29.7	25.4	21.1	1.23

MARKETERS 2016: 405. DATA IN % AND AVERAGE.

R3-SCOPEN BEST PRACTICE 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.

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.

消费者越来越分散，广告主和代理商需要采取更多举措来争取消费者。各类资源需要采取一种“不间断”的全天候营销策略，并分散到多种途径，而且需要评估比几年前更为复杂的各类数据，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。

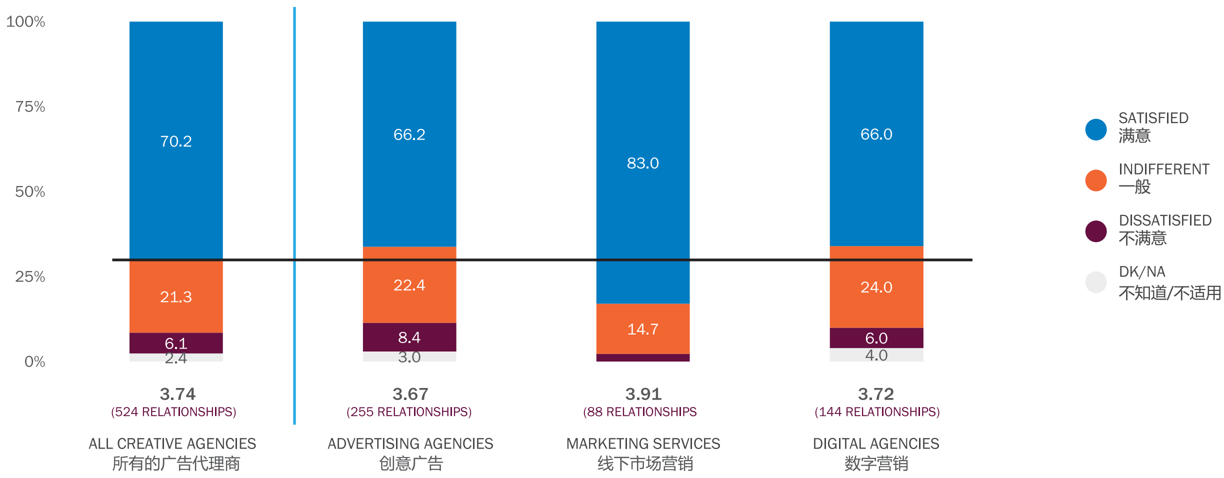
与我们合作的广告主中，最成功者均拥有浓厚的内部人才培养文化，他们为员工提供长期培训以及快速晋升通道。策略发展和指导的关键在于带领来自以下领域的人员组成跨部门团队来开展工作：品牌、销售、人事、IT及分析、广告技术和社交媒体，同时必须具备强大的内部管理能力和资源。

6 MOST MARKETERS SATISFIED WITH THEIR CURRENT AGENCY PARTNERS BUT A THIRD MIGHT OCCASIONALLY CONSIDER A PITCH.
大多数广告主对其当前的合作代理商感到满意，但三分之一的广告主仍经常进行比稿。

Marketing services agencies score the highest, with marketers 83% satisfied with their current relationship, followed by 70.2% of marketers satisfied with their advertising agency. Digital agencies score lower, with 66% satisfied with media agencies dropping to 62.9%. That means around a third of all marketers are either indifferent to or dissatisfied with their current agency relationship.

最令广告主满意的是线下市场营销服务代理商，83%的广告主都对其当前的线下市场营销服务代理商感到满意，其次是创意广告代理商，有70.2%的广告主对其当前创意广告代理商感到满意。数字代理商位居第三，66%的广告主对其感到满意，对媒介代理商感到满意的广告主则下降到了62.9%。这意味着总体上有三分之一广告主对当前代理商的关系感到一般或不满意。

The Change of Agency 更换代理商的因素
Satisfaction with current Creative Agencies 对当前广告代理商的满意程度

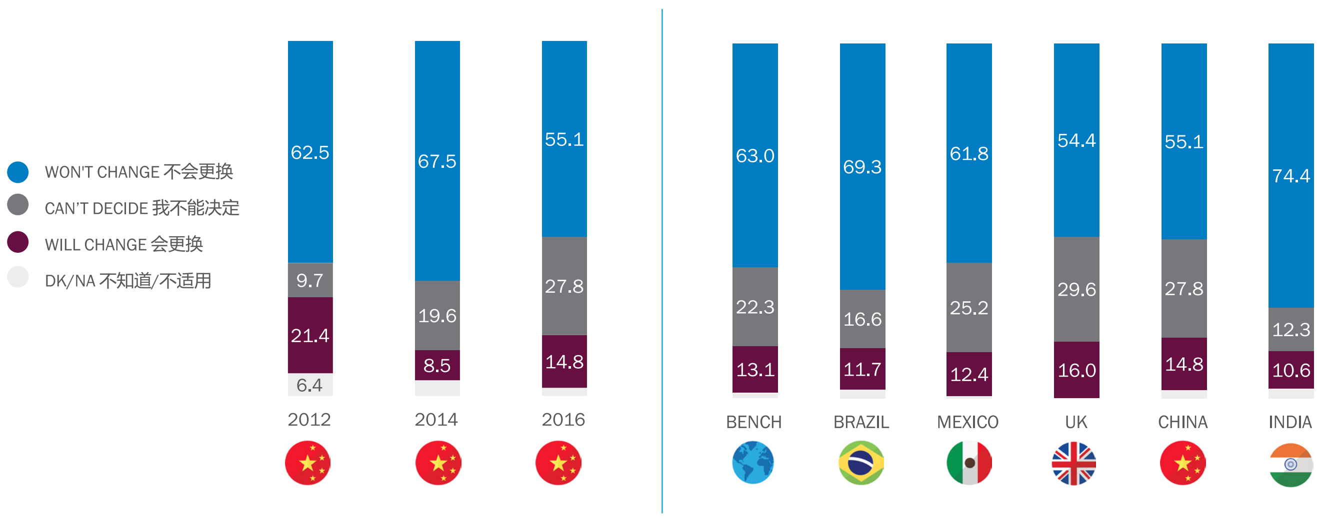


CLIENT-AGENCY RELATIONSHIPS 2016. ALL CREATIVE AGENCIES (537) – ADVERTISING AGENCIES (263) – MARKETING SERVICES (88) – DIGITAL (150). DATA IN %.

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，表明中国的广告主与代理商的合作期限较短。

Change of Agency 更换代理商的因素
Predisposition to change current Advertising agency 更换当前创意广告代理商的倾向



CLIENT-AGENCY RELATIONSHIPS 2014 (BRASIL-MEXICO) 2015 (UK) 2012: 215, 2014: 261 AND 2016: 225 (CHINA) AND 2010 (INDIA). DATA IN %.

Bad service and account team issues are amongst the most frequently mentioned reasons for changing to another agency. For advertising agencies, 30.8% of respondents mention this as their key reason, 22.7% for digital agencies and 22.2% for marketing service agencies. For media agencies, lack of creativity and innovation were cited by 23.8% and 23.8% also mentioned high costs and transparency as the main reasons for deteriorating relationships.

不专业的服务以及客户团队的问题是更换代理商最为常见的原因。对于创意广告代理商，30.8%的受访者表示上述问题是主要原因，而对于数字代理商和线下市场营销服务代理商，这一比例分别为22.7%和22.2%。对于媒介代理商，23.8%表示缺乏创意与创新，23.8%表示成本与透明度问题，是导致广告主与他们的合作关系不断僵化的主要原因。

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: email and credentials presentations mentioned by 41.8% of marketers, followed by social network 19.4% and research about my sector 16.8%.

网络、行业媒体、广告奖项、活动及研讨会是广告主了解当前行业形势的重要途径。目前，广告主获得代理商相关信息最有效的渠道为：41.8%的广告主表示是通过电子邮件发送资历简述，19.4%表示是社交网络，16.8%表示是对行业相关研究。

R3-SCOPEN BEST PRACTICE 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广告主的期望，我们的研究显示广告主满意度有待提高。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。广告主应该向代理商提供反馈，并给予他们提升表现的机会。如果种种措施均以失败告终，不得不进行比稿时，我们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。

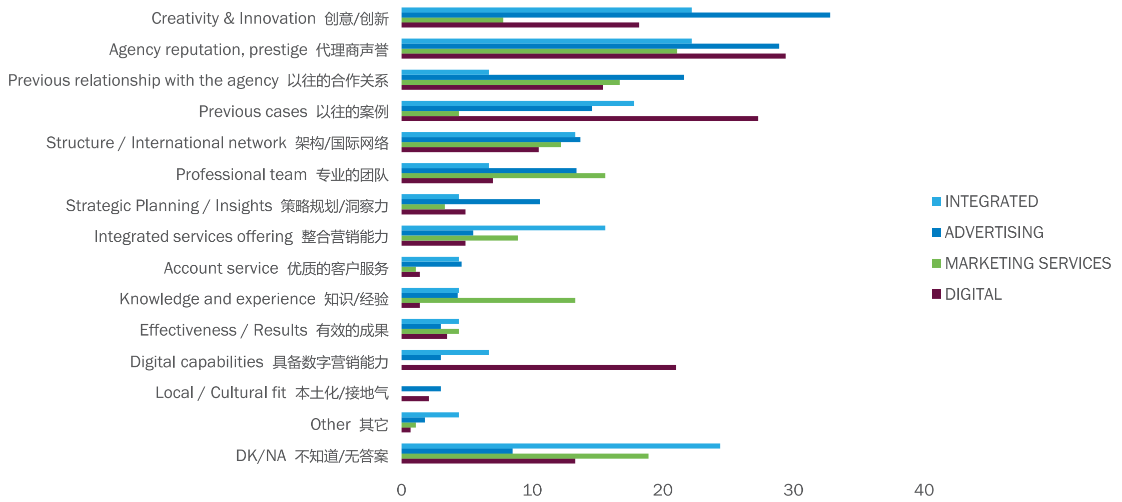
7 67% OF MARKETERS SCORE CREATIVITY/INNOVATION AS THEIR MOST DEMANDED CHARACTERISTIC OF THEIR IDEAL ADVERTISING AGENCY.
67.3%的广告主认为创意/创新是理想的创意广告代理商该具备的首要特质。

When a pitch is called, marketers at the shortlist stage list specific criteria for each type of agency including: reputation, creativity and network strength, all which are ranked highly. For advertising agencies, 22.8% of respondents also mention previous working relationship as a reason to add an agency to the shortlist. For digital agencies, 17.3% mention previous relationship with 20% influencing the media agency shortlist. Past knowledge of an agency and its leader-ship has shown a big increase in importance in this latest survey, reflecting growing experience of marketers.

进行比稿时，广告主着重关注于，针对各类代理商列出的特定属性（包括：声誉、创意及网络资源优势）十分重视，并据此制定最终比稿的候选名单。对于创意广告代理商，22.8%的受访者表示此前的工作关系也是将其纳入最终候选名单的原因之一。对于数字代理商和媒介代理商，分别有17.3%和20%的受访者表示之前的合作关系会影响最终的候选名单。本次研究还显示，对于代理商及其领导能力的深入了解显得越来越重要，这也显示出广告主的经验日益丰富。

Agency Selection 选拔代理商

Criteria used to create a Short List of Creative Agencies 选拔创意代理商名单的标准



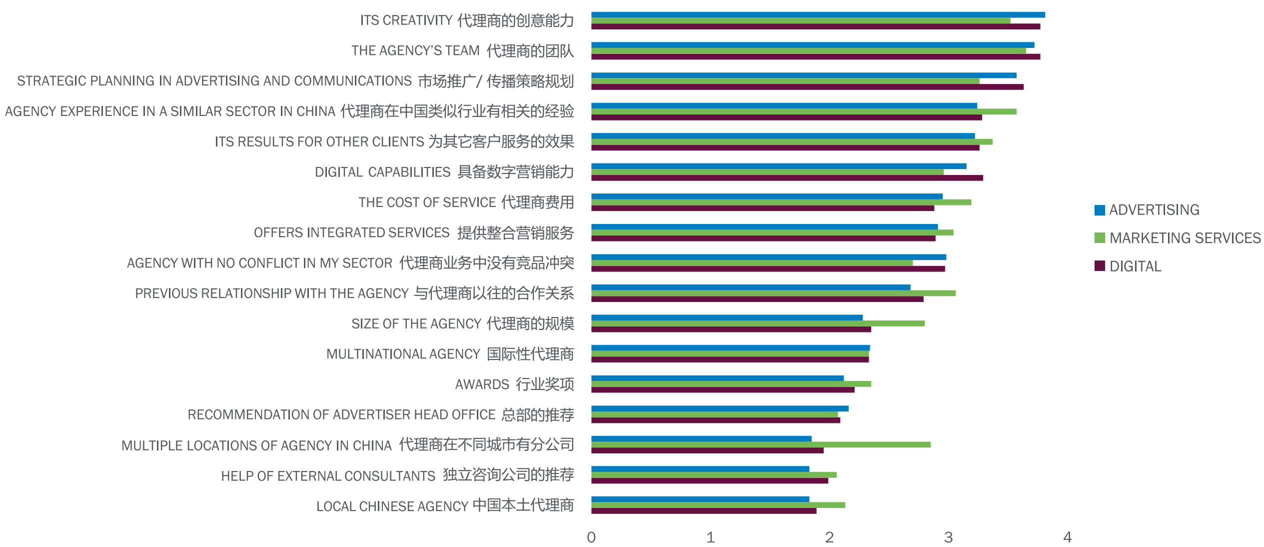
MARKETERS THAT WORK WITH CREATIVE AGENCIES 2016: 310. DATA IN %.

When probed on their agency selection criteria, creativity and experi- ence top the list of key attributes marketers want in their ideal agency. For advertising agency selection, 67.3% score creativity and innovation most highly; 53.2% highlight knowledge and experience (of brand, sector, business); and 43.2% demand strong strategic planning, which should prompt agencies to continue to strengthen their strategic offering. Marketing services agencies are expected to offer strong implementation and execution resources as were mentioned by 56.1% of respondents, with digital agencies needing strong all-round digital capabilities as scored by 55.1% of respondents.

谈及选择代理商的标准时，创意和经验在广告主选择理想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，67.3%的受访者高度重视创意与创新，53.2%强调拥有品牌、行业和业务方面的知识和经验，43.2%要求代理商具备强大的策略策划能力，这可以激励代理商不断增强其策略服务。56.1%的受访者希望线下市场营销服务代理商提供强有力的实施和执行资源，55.1%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

Agencies Selection Criteria 挑选标准



MARKETERS WORK WITH CREATIVE AGENCIES 2016: 310. DATA IN %.

For the ideal media agency, 39.3% rank media planning and communications strategy most highly whilst 31.5% of marketers rank transparency as the third most highly ranked attribute, reflecting the ongoing global debate on agency rebates and digital buying mark-ups. There are clear lessons here for media agencies on accountability and transparency.

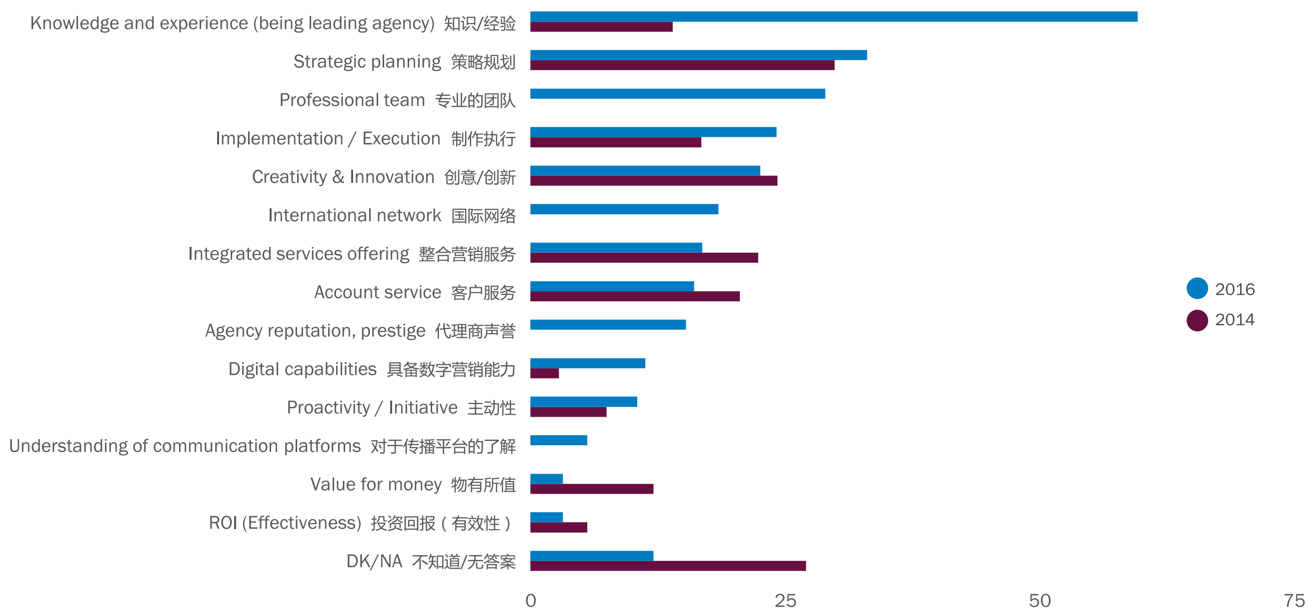
对于理想的媒介代理商，39.3%的受访者将媒体策划和传播策略视为最重要的条件，而31.5%的广告主将透明度列为第三重要的条件，这反映了全球正在热议的代理商回扣和数字购买加价问题。媒介代理商可以从中汲取经验，提高可靠度和透明度。

When asked to list the criteria in an ideal integrated agency, marketers also ranked: strategic planning, professional team and integrated services as key demands. These should feature strongly in any holding company agency model.

我们请广告主列举衡量理想的整合型代理商的标准，他们将策略策划、专业团队及整合型服务列为关键要求，这些标准对任何集团控股公司代理模式都很重要。

Agency Selection 选拔代理商

Characteristics of the 'Ideal' Lead-Integrated Agency "理想的"整合营销代理商的属性



MARKETERS THAT 'WORK WITH INTEGRATED AGENCIES' 2014: 107 AND 2016: 124. DATA IN %.

R3-SCOPEN BEST PRACTICE 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，这种方式只适用在尝试其它措施均遭遇失败后再采用。

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.

评估自身所处位置，制定可衡量的目标和基准，以取得成功的比稿结果。咨询关键利益相关方及参与代理商RFP的人员，共同商定代理商选择标准。

8 AGENCY PITCH IS STILL THE MOST POPULAR PROCESS FOR SELECTING A NEW AGENCY PARTNER, BUT PITCHES OFTEN LACK TAILOR MADE IDEAS.

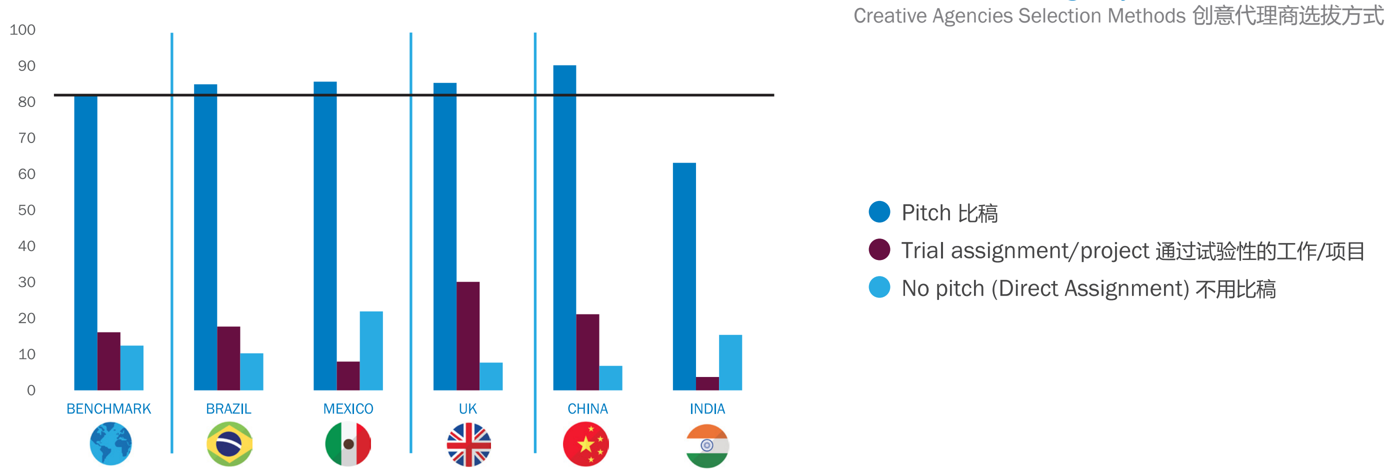
比稿仍是广告主挑选新合作代理商时最受欢迎的方式，但代理商展示的提案演示往往缺乏量身定制的内容。

Amongst those deciding to review their current creative agency relationships, 90.2% of respondents would use a pitch process. 21.1% 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.

决定重新审视当前与创意代理商关系的广告主中，90.2%的受访者会采用比稿流程。21.1%会采用测试任务，可能单独进行，也可能作为比稿流程的一部分。意料之中，中国广告主进行比稿的频率要高于全球基准。

Agency Selection 选拔代理商

Creative Agencies Selection Methods 创意代理商选拔方式



MARKETERS INDIA (2010), 2014 (BRAZIL), 2015 (MEXICO, UK) AND 2016 (CHINA). DATA IN %.

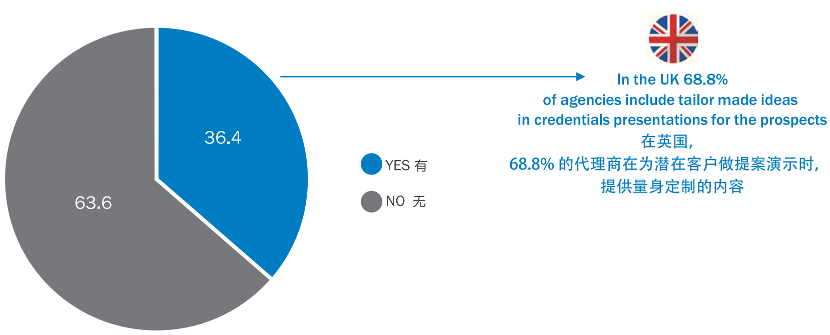
When evaluating the pitch process and content, over 63.6% of marketers said the creative agency presentation didn't contain enough ideas tailor made to their brands and 68.4% said the media agency presentation lacked brand-specific ideas. That being the case, this is a further valuable insight for agency new business teams.

评估比稿流程及内容时，超过63.6%的广告主表示创意代理商的提案中针对其定制的创意不足，68.4%表示媒介代理商的提案缺乏针对品牌的创意。代理商的新业务开发团队可从上述研究结果中汲取有用的经验。

Agency Selection 选拔代理商

Tailor Made ideas presented for your brand (Creative Agencies) 为您的品牌量身定制的提案（创意代理商）

IN THESE PRESENTATIONS, DID THEY GIVE YOU IDEAS THAT WERE TAILOR MADE FOR YOUR BRAND(S)?
提案中有为您的品牌量身定制的内容吗？



MARKETERS THAT WORK WITH ADVERTISING AGENCIES AND 'RECEIVED A NEW BUSINESS PRESENTATION' 2016: 143. DATA IN %.

R3-SCOPEN BEST PRACTICE 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 the trouble of a presentation, it has to be relevant and focussed to cut through. For marketers, that means giving a clear brief and expectations, as well as having a transparent selection criteria. For agencies, that means taking 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.

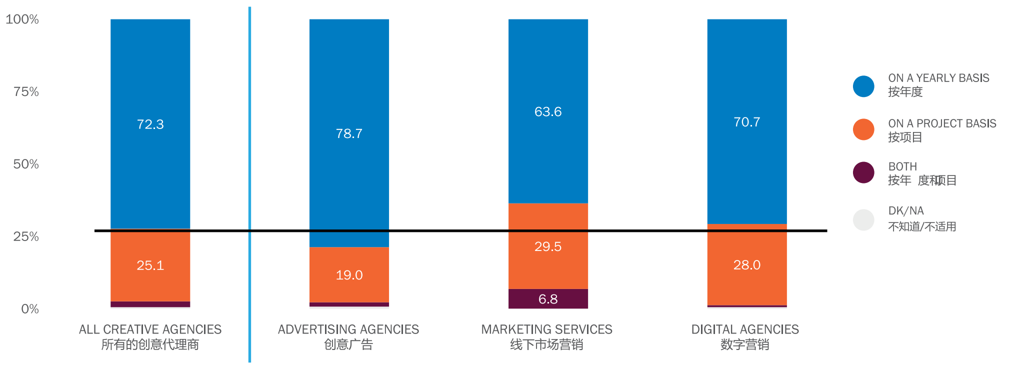
若代理商要竭尽全力做好提案，他们必须紧扣主题、切中要点。对于广告主而言，这意味着他们需要清楚地说明情况、表明期望，并采用透明的选择标准。对于代理商而言，这意味着他们要花时间去真正了解核心问题，提供与品牌紧密相关的创意和解决方案，否则就无法得到应有的关注。

9 FEE / RETAINER AND PROJECT BASIS IS MOST USED AGENCY REMUNERATION MODEL.
服务费用/年费和按项目计费是最常使用的报酬模式。

72.2% of advertising agencies are remunerated by fee/retainer, up from 55.8% in 2014 and just 40.5% in 2012. Fees are also most often used to remunerate marketing services (53.4%) and digital agencies (58%) alongside project-based payment. 63.4% of media agency relationships are based on fees / retainer but with 25.2% still basing payment on a simple commission model.

72.2%的创意广告代理商得到服务费用/年费的支付，比2014年的55.8%有显著增长，2012年这一数字仅为40.5%。服务费用也常被计入报酬：线下市场营销服务代理商为53.4%，数字代理商为58%，同时还有根据项目支持的模式。63.4%的媒介代理商关系都建立在支付服务费用/年费的基础上，但25.2%仍采用简单的佣金模式支付报酬。

Client-Agency Relationships 客户与代理商关系
Relationship Model (Way of working with agencies) 与代理商的合作形式



CLIENT-AGENCY RELATIONSHIPS 2016. ALL CREATIVE AGENCIES (537) – ADVERTISING AGENCIES (263) – MARKETING SERVICES (88) – DIGITAL (150). DATA IN %.

Incentive payments to agencies still lag behind other survey markets. 21.7% of advertising agency relationships include an incentive payment, compared to 38.1% amongst our global benchmark. For marketing services and digital agencies, an incentive element is even lower at 13.6% and 12.7% of relationships. Amongst media agencies, 19.8% of relationships contain an incentive element.

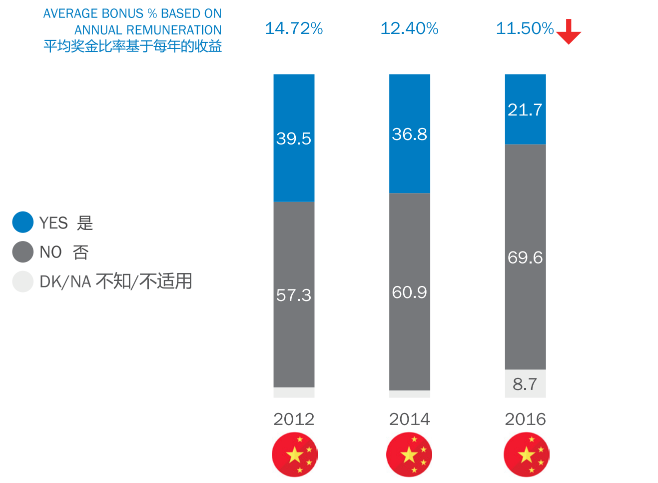
中国广告主给予代理商的奖励报酬仍然低于其他研究市场。21.7%的创意广告代理商关系中涉及奖金，而全球基准是38.1%。线下市场营销服务代理商及数字代理商获得的奖金较低，分别为13.6%和12.7%。在媒介代理商中，19.8%的合作关系中涉及奖金。

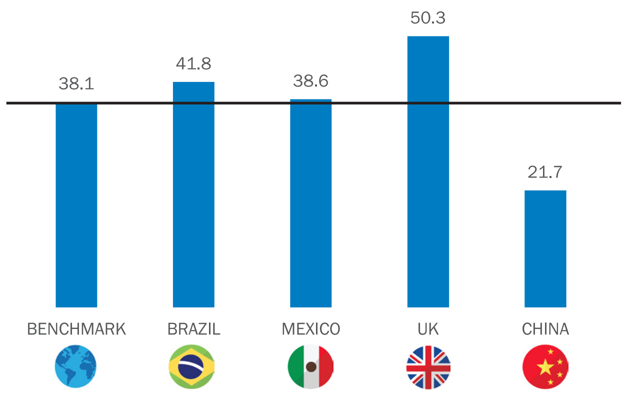
Incentives, when they are paid, range from 8.7% to 11.5% of annual remuneration.

若提供奖金，金额一般为全年报酬的8.7%到11.5%。

Client–Agency Relationships 客户与代理商关系

Remuneration Advertising Agencies (Incentive payment) 广告代理商酬劳方案 (奖金)





CLIENT-AGENCY RELATIONSHIPS 2014 (BRASIL-MEXICO) 2015 (UK) 2012: 505, 2014: 552 AND 2016: 263 (CHINA). DATA IN %.

R3-SCOPEN BEST PRACTICE 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.

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

服务费用/年费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，对保证公正合理的付费非常关键。

设定可衡量的业务增长目标以此作为基本费用和奖金制度的基础.

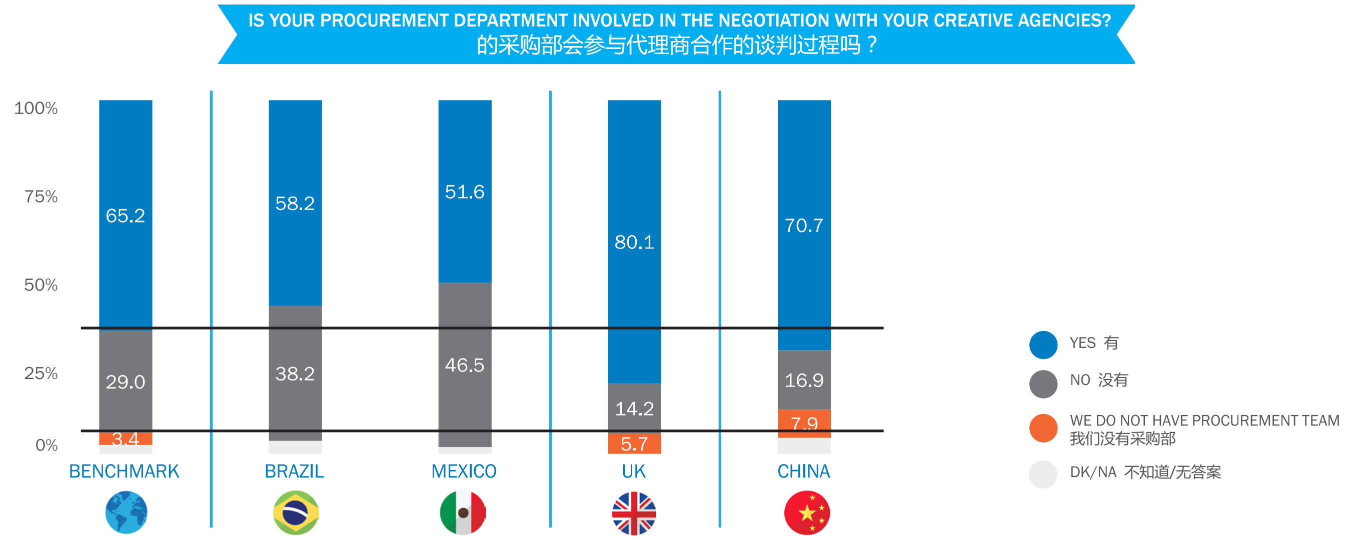
10 CLIENT PROCUREMENT TEAMS ARE INVOLVED IN 70.7% OF CREATIVE AGENCY NEGOTIATIONS AND 69.4% OF MEDIA AGENCY NEGOTIATIONS. 70.7%的创意代理商谈判以及69.4%的媒介代理商谈判，客户采购部皆有参与。

The 2016 study has seen a significant increase in the involvement of client procurement in the agency negotiation process, with 70.7% of marketers saying procurement is involved with the negotiation with creative agencies, and 46.8% say the process is jointly led by marketing and procurement. Procurement is more involved in China compared to our global benchmark.

2016年的研究显示，客户采购部在代理商谈判过程中参与度越来越高，70.7%的广告主称采购部会参与创意代理商的谈判，另有46.8%称此过程由市场部和采购部共同主导。采购团队在中国的参与度高于全球基准。

Agency Selection 选拔代理商

Negotiation process (Creative Agencies) 谈判过程 (创意代理商)



MARKETERS 2014 (BRAZIL), 2015 (MEXICO, UK) AND 2016 (CHINA). DATA IN %.

Marketers scored procurement team involvement very highly for price negotiation, value for money and financial transparency (mentioned by 69.2% of respondents).

69.2%的广告主认为采购部的参与对于价格协商、物有所值和财务透明度都非常重要。

R3-SCOPEN BEST PRACTICE 最佳实践

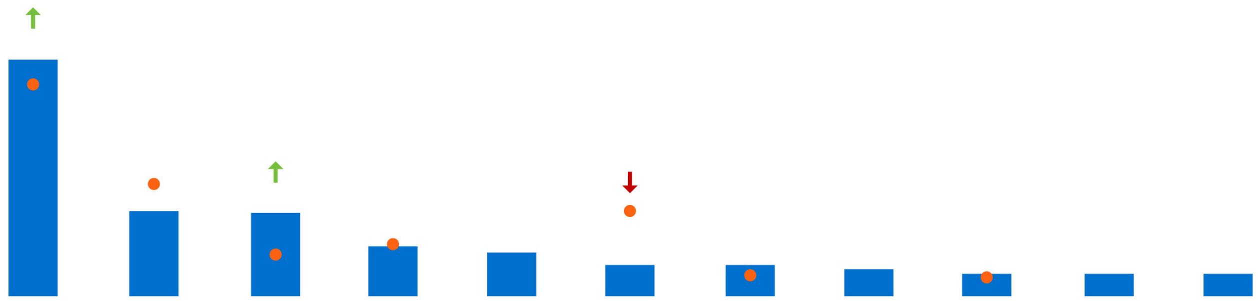
Procurement involvement in the agency selection and fees process is here to stay and meeting little or no resistance from agencies. All sides appreciate the value and transparency procurement can bring to the process.

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

采购部会参与选择代理商并确定服务费用的过程，这种现象将长期存在，极少甚至没有代理商对此表示反对。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。

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。

MOST RESPECTED COMPANIES IN CHINA
最受欢迎的公司品牌

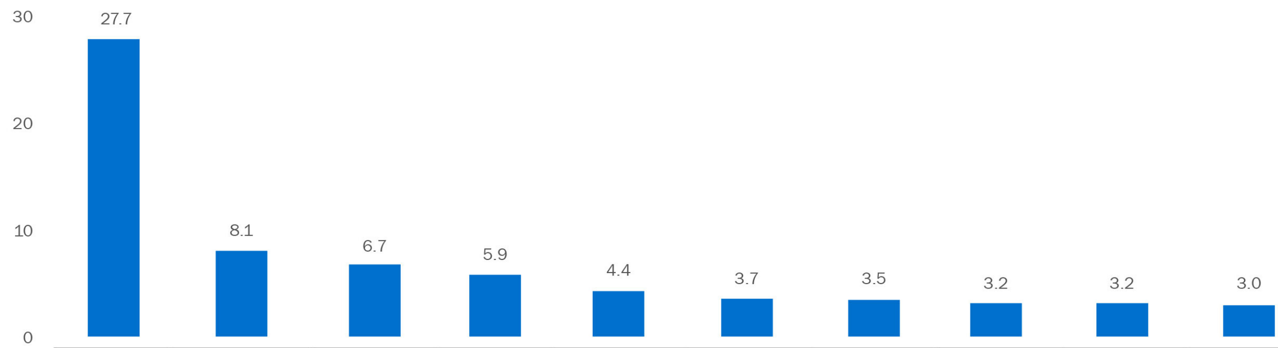


2016	1st	2nd	3rd	4th	5th	6th	6th	8th	9th	10th	10th
2014	1st	3rd	7th	6th	--	4th	16th	--	17th	--	--
	Coca-Cola	NIKE		P&G	durex	BMW	Unilever	加多寶 JIA DUO BAO	伊利	Mars	mi

2014 2016

MARKETERS 2012 (261) AND 2016 (405). DATA IN %.

BEST CREATIVE CAMPAIGNS
最佳创意案例



2016	1st	2nd	3rd	4th	5th	6th	6th	8th	9th	10th
2014	1st	20th	3rd	9th	26th	47th	5th	–	–	47th
	Coca-Cola	durex	NIKE		箭牌 WRIGLEY	new balance	BMW	Dove	加多寶 JIA DUO BAO	mi

2014 2016

MARKETERS 2012 (261) AND 2016 (405). DATA IN %.

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.

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

WORLDWIDE

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

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

Ho Chi Minh City

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

Sao Paolo 圣保罗

Contact us 联系我们

Europe 欧洲

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www.rthree.com

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www.r3integration40.com

www.r3social40.com

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

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WORLDWIDE