



CHINA PR SCOPE

中国公关行业营销趋势研究

2019

An R3 White Paper

PREFACE

前言

2019 China PR Scope is the fifth 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.

《2019中国公关行业营销趋势研究》是胜三进行的一项长期研究，今年是第五轮。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。

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

These key words represent the trends, needs, concerns, and challenges of both marketers and agency professionals identified during our study.

在本次调研中，一些关键字不断地被受访者提及，它们代表了公关领域的市场主及代理商同仁最关注的趋势变化、考量、担忧、以及挑战。



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DIGITAL DEMANDS A BROADER SCOPE AND GREATER RESPONSIBILITY

传播数字化变革了市场主及公关代理商的工作职能

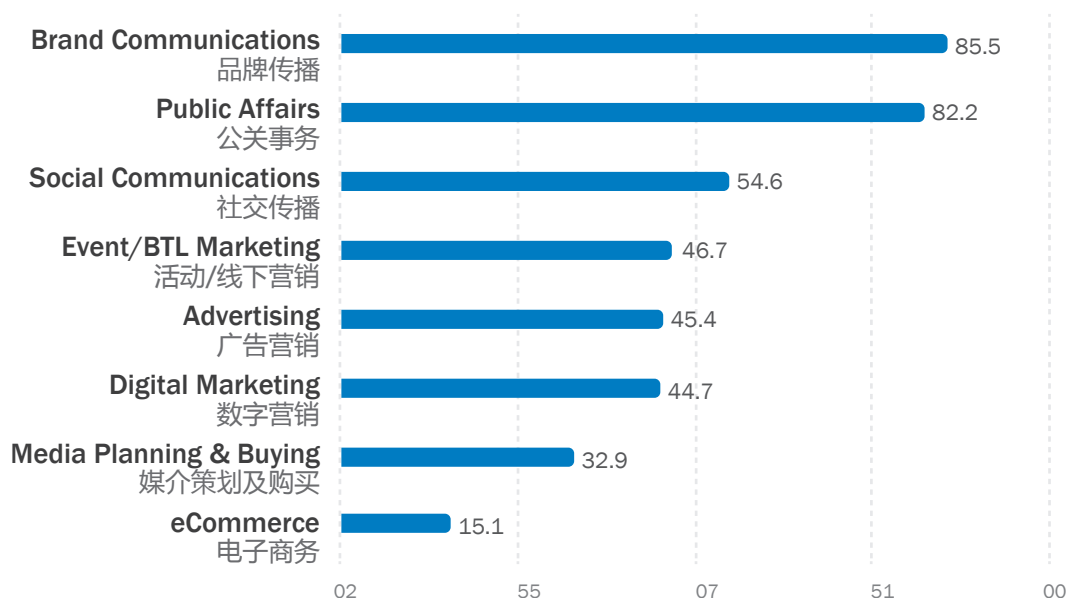
Digital/social's impact on PR goes beyond use of media and communication. It has required a re-evaluation of brands' internal structures, marketer responsibilities and the scope of work for PR agencies.

In addition to the traditional PR responsibilities of brand communication and public affairs, more than half of the interviewees are in charge of social communications, event/BTL marketing, advertising, and digital marketing, with one-third of that group involved in media planning and buying. This shows that PR responsibility on the client side has been extended and is more complex. In addition, over 40% of the PR agencies are now in charge of KOL management and social-related work as well as traditional PR services.

数字化/社交化对公关领域产生的冲击，其影响不仅仅在媒体使用及传播手段等层面，更深入地影响了品牌方的内部组织及职能架构，以及公关代理商的工作范畴。将近一半的受访市场主，除了品牌传播及公关事务等传统公关领域的职责之外，还需要同时肩负社交传播、活动/线下营销、广告营销或数字营销等其他，甚至还有三分之一的受访者需参与媒介的策划及购买，显现品牌方的公关负责人员的工作范畴有相当程度的扩充与复杂化。

另外，也有超过4成的公关代理商，除了传统的公关服务项目，同时还负责客户的KOL管理、社交媒体维护等社交相关的工作范畴。

POSITION OF INTERVIEWEE 受访者职位



PR AGENCIES ARE IN COMPETITION WITH MEDIA RELATIONS FOR TOP RESOURCES

媒体方面的角色加重，从维系媒体关系扩大到为主市场主争取并整合媒体资源

Content/creativity development and media relationship building and maintenance are the key strengths of a PR agency. While there are many available resources in the market, only a very limited number are of high quality, with enormous competition from various types of agencies and clients.

A PR agency should utilize its strength in media relationship maintenance to secure its access to different types of resources, thus demonstrating their ability to achieve greater integration effectiveness in media and communication.

内容/创意及媒体关系建立与维护是公关代理商的主要强项，这部份在目前的传播环境下，依旧占有非常重要的位置。市场资源选择虽多，但优质资源有限，面对不同类型的代理商及客户都在争抢的情况，公关代理商需发挥维系媒体关系之强项，掌握更多不同类型的资源，展现在媒体及传播上能更有效整合的优势。



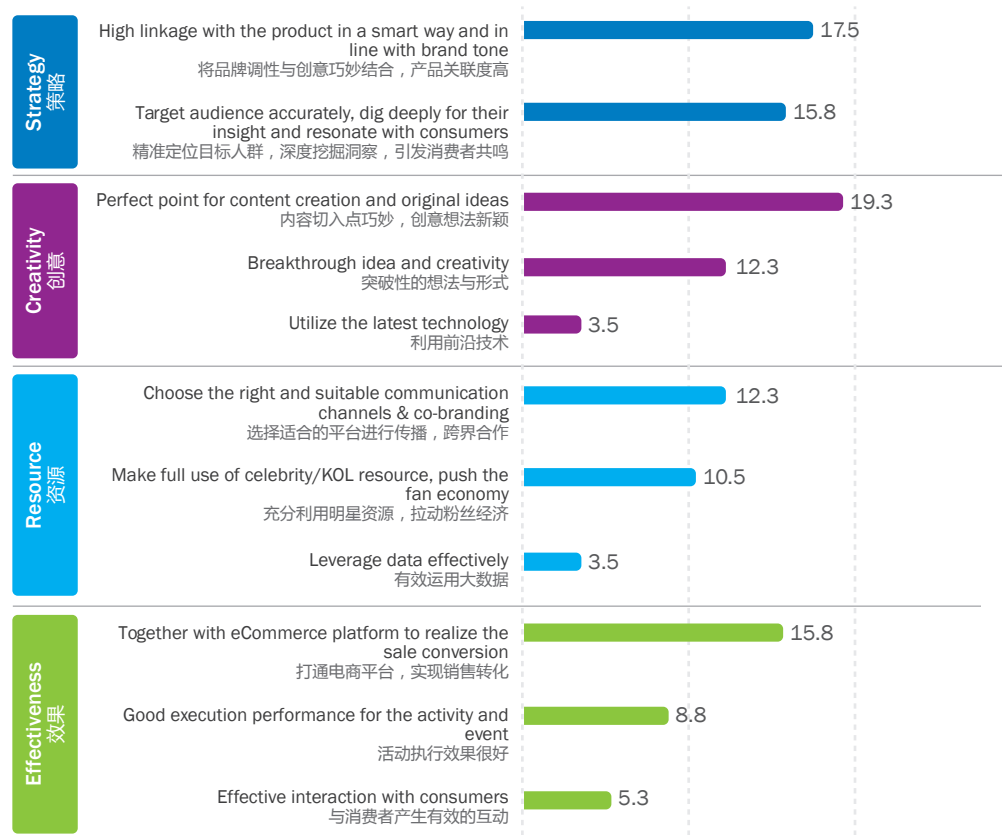
SUCCESS LIES IN DEEP INSIGHTS AND BETTER BRAND TONALITY

深入的洞察及对品牌调性的掌握， 是成功公关传播的必要致胜关键

Marketers think that successful communication requires deep insights into consumers and channels/media and better integration of brand tonality and creative/content. As a result, PR agencies need to enhance their capability in communications strategy and creativity, and maintain specialization in their initial area of PR expertise, all while developing a breakthrough communication model that will allow them to utilize different platforms to achieve communication objectives.

市场主认为，成功的公关传播来自于对消费者及渠道/媒体的深入洞察，并将品牌调性与创意/内容做更好的结合。公关代理商除了原公关领域的专项能力，还需强化传播策略及创意的能力，突破传播模式的限制，更全面地思考如何运用不同的平台达成传播目的。

POSITION OF THE INTERVIEWEE 公关传播活动的制胜关键



Note: Marketers interviewed 2019 (152 – 95 DK/NA), O/E Question. Data in % and Mentions.

ROI IS KING, BUT EVALUATION STANDARDS STILL LACK ROI

ROI是现今营销界最大的课题，公关领域也不例外。

Marketers have begun to focus more on the ROI of PR communications, especially on the effectiveness, evaluation, and need for data.

Data collection and analysis improve communication efficiency in several ways. Population subdivision and accurate delivery enable marketers to develop targeted creative and content. Database integration and tracking also support improved analysis and evaluation of the effects of communication.

It should be kept in mind that measuring the effectiveness of various communication approaches might not entirely rely on data analysis, and the accuracy and transparency of current evaluation methods are still in question. There is also a lack of an evaluation standard for quality.

市场主对于投资回报率的关注也延伸到公关领域，特别是在如何评估传播的有效性 & 验证实际效果上，相对地对于数据的需求也日益提高。

数据收集与分析在不同维度上能提供传播优化的契机，更细分的人群画像与精准投放，让品牌主能够更针对性地依据不同目标群体发展不同的创意与内容，后台资料的整合与追踪，也助益了传播效果的量化分析与评估。

然而，就目前的现状来看，不同公关传播方式的效果评估不一定都能有相关的数据来进行分析，对于数据的收集及评估衡量方式，其正确与真实性还有争议，也缺乏针对质量的评估标准。



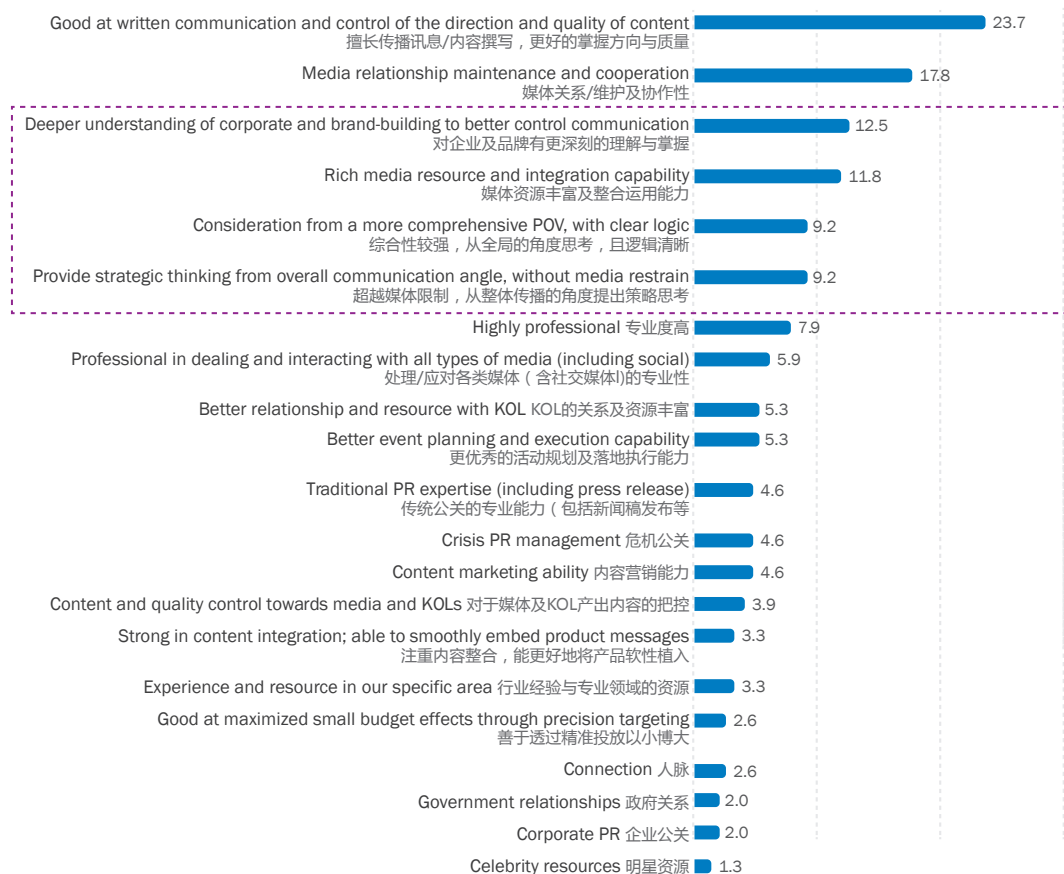
LEADERSHIP WILL BE BUILT ON OVERSIGHT ON OVERALL COMMUNICATION STRATEGIES & STRENGTHS IN CROSS-MEDIA PLATFORMS

危机亦是转机：公关与营销的界线模糊，掌握跨媒体优势，抢占整合传播的领导先机

PR agencies will have to face the threat of replacement by other agencies. Most marketers still recognize the competitive advantages of PR agencies in the current digitalized communication environment, as many think that a PR agency, with its deeper understanding of corporate/brand and lack of limitation by media type, can consider the overall communication strategy and media integration from a broader POV.

受到数字/社交化影响，代理商工作内容同质化，公关代理商有逐渐被其他类型代理商取代的挑战。但于此同时，绝大多数的品牌主能清晰点出公关代理商在现今传播环境中所具备的竞争优势，特别是在其对企业及品牌的深度理解，加上不受传播媒体类型/载体限制，反而能够更全面的思考整体传播策略及媒体运用整合。这是市场主对公关代理商的期许，亦是他们认为公关代理商在迎向未来最大的挑战，更是公关代理商胜出的契机。

STRENGTH FOR PR AGENCIES 公关代理商的优势



EXTENDED SUMMARY AND BEST PRACTICE

要点延展和最佳实践

1

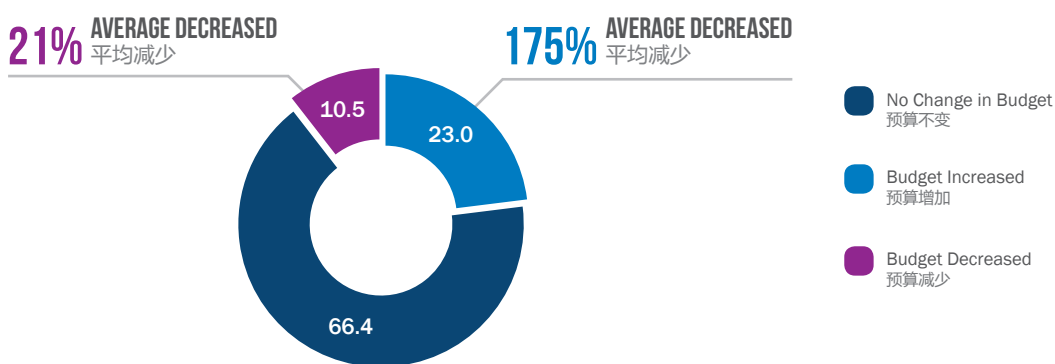
PR BUDGETS ARE INCREASING WITH DIGITAL AND NEW MEDIA SCOPE

职能的变化及新媒体投放的需求影响了公关的预算规划。

In terms of trends in PR communication, there were some internal organizational or responsibility changes in almost 40% of the interviewee's companies. More brands chose to increase digital or new media-related scope or talent within their PR teams; few chose to reduce PR work scope and move digital-related scope (KOL/social media) into marketing, or divided their PR teams into separate business units to handle their digital marketing with a specific KPI set. Changes in PR budgets were related to the structural and functional changes within the marketers' companies.

因应公关领域数字化/社交化的趋势，约有4成的受访企业在内部的组织架构及职能上做了相对应的调整。其中，较多的市场主选择在公关团队新增与数字相关的职能或与新媒体有关的人才及岗位；另一些市场主选择缩减公关职能，将KOL/社交媒体等数字相关的职能转入市场部，或将公关团队打散至各个单独的事业部，负责各自的数字营销，并且有更为明确的KPI。组织及职能的变化同时也影响了公关预算的分配。

PR BUDGET 公关预算



In the past year, the average PR budget rose by 38%. This is mainly due to the increasing needs for new media and PR digital/social operations. 10% of marketers' PR media budget was reduced because they separated digital needs from PR and moved them into the marketing department. That being the case, they had a lower budget for traditional PR.

过往一年，公关预算总体增加38%，预算的增加体现在公关传播的数字化/社交化，以及对新媒体投放的需求增加。另有一成的市场主表示，公关预算减少，其主要原因则是公司将数字部分的职能并入市场部之后带来的传统公关预算的减少。

2

KOL AND CELEBRITY ENDORSEMENTS ARE PREFERRED OVER NEWS AND EDITORIALS, THOUGH EVALUATION CRITERIA REMAINS UNCLEAR

传播媒介及渠道多元化，传播有效性很难通过清晰的效果评估来判定。

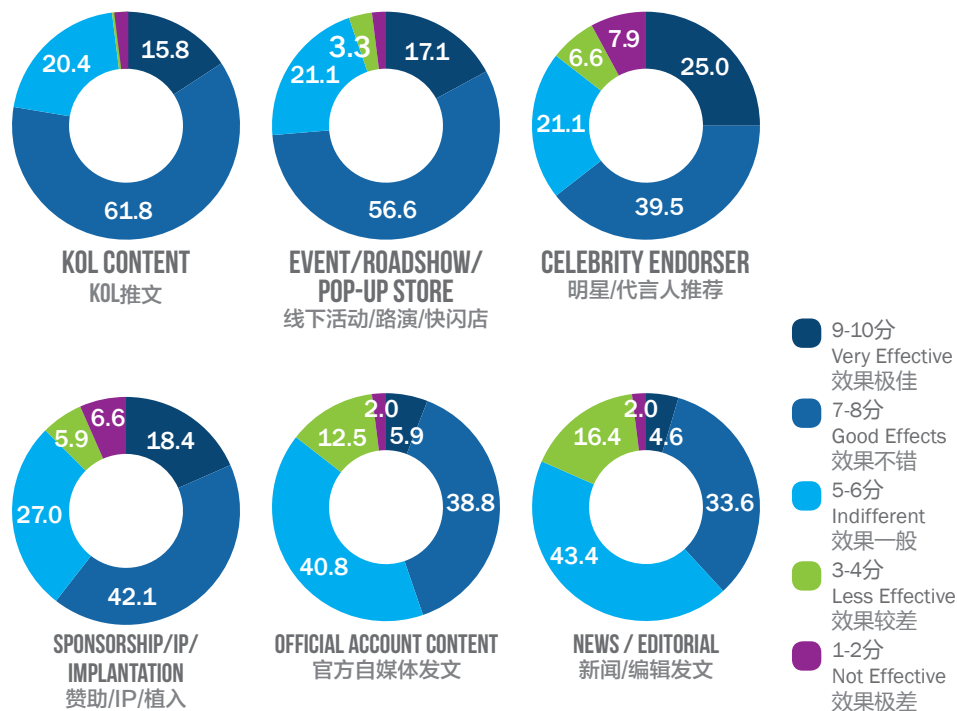
Six common communication approaches were examined in this study. The preferred approach is still KOL Content and Events, whilst Official Account Contents and News/Editorials are considered to be less effective or interviewees were indifferent to them. Some of the interviewees noticed that Celebrity Endorsement and Sponsorship/IP also received a great deal of attention, with more marketers rating them as very effective.

将常用的公关传播手段分为6大类来进行探讨。以效果而言，主流依旧是KOL推文及线下活动类，官方自媒体及新闻/编辑发文的效应减退。部分市场主认为，明星/代言人推荐及赞助植入/IP等合作模式能带来极佳成效，亦是今年受重视的传播手段。

EFFECTIVENESS OF COMMUNICATION APPROACH 传播方式的有效性

> In terms of your experience with brand communication effectiveness, which of the following communication approach makes more impact on consumers?

就自身品牌的公关传播经验而言，您觉得以下传播方式触及消费者并产生影响的效果如何？



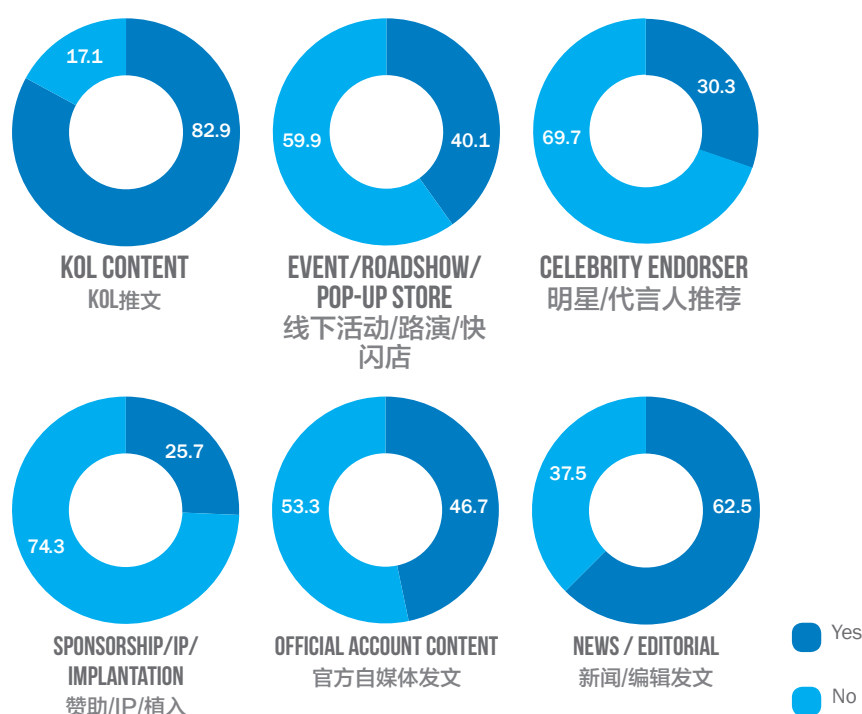
Note: Marketers interviewed 2019 (152), data in %

Not all approaches can be evaluated with data. Half of the marketers judge their effectiveness through market feedback and internal assessments. Currently, two-thirds of interviewees are not using data to evaluate the communication effects of Celebrity Endorsements and IP/Sponsorship. These are services they expect their PR agency to provide, especially in evaluating the efficiency of actual conversion.

然而，并不是所有的传播手段都能够过数据来评估其实际效应，有效性的判定有一半还是来自市场主观察与接收到的市场反馈与自身感受。目前有2/3以上的受访者无法运用数据来评估明星/代言人及IP/赞助植入的传播效果，而这部份的数据运用也是他们期待公关代理商能够提供的，特别是在如何评估其实际转化效率上。

EVALUATION OF COMMUNICATION APPROACH 传播方式的效果评估

Did you use any data to evaluate its effectiveness or help to make the decision?
您是否运用数据评估传播方式的效果或帮助影响决策？



Note: Marketers interviewed 2019 (152), data in %

ESTABLISH EFFECTIVE EVALUATION WITH SYSTEMATIC PERFORMANCE MEASUREMENT AND BRAND ASSET MANAGEMENT

最佳实践：透过系统化的表现测量 及品牌资产管理，建立明星代言及 赞助植入的效果评估体系

As the entertainment market is becoming more dynamic, providing brands with more opportunities to invest, measuring effectiveness and evaluating ROI becomes more challenging as there is no established standard for these communication equities. Marketers need to turn the tactic of riding a hot trend into a more strategic approach to form stable brand connections with target audiences.

This is where third-party consultants can utilize their expertise to establish an evaluation system that organizes relevant assessment criteria, which in turn, helps marketers make judgments based on a complete information matrix.

随着娱乐市场的逐渐活跃，品牌主在娱乐营销上的投入越来越多，衡量与评估这部分投资回报率的难度也越来越大。因为这部分的传播质量暂时没有标准，市场主需要由利用热点趋势的转变更具战略性思考的娱乐营销策略，以便在品牌与目标受众之间形成更加稳固的联结。

第三方咨询机构可以利用其专业知识与行业洞察帮助市场主建立一个评价系统，通过整理罗列有关的评估标准，帮助市场主做出完整的判断。

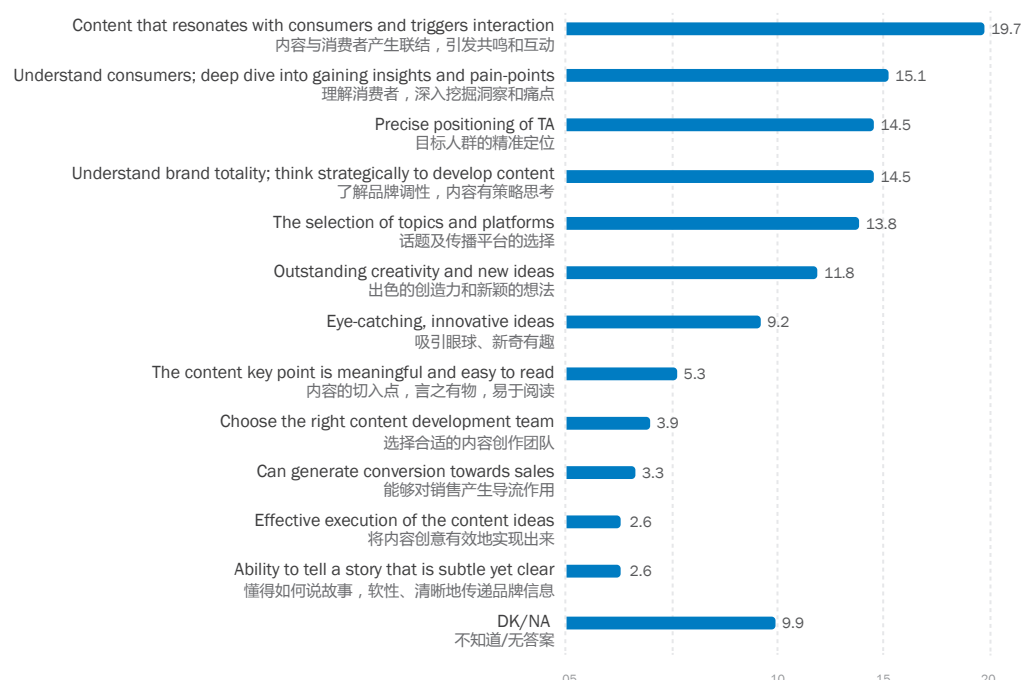


3

GREATER INSIGHT IS THE KEY WINNING POINT FOR
CONTENT MARKETING市场主对内容营销的关注在于其能达成的
目的与任务，致胜关键在于洞察。

The winning key point of content marketing lies in an in-depth understanding of consumers and the control of brand emphasis and strategy. The fragmented way that consumers receive messages has led to decentralized attention and rapidly changing behaviors. Formats are more diversified, as are the requirements of content and engagement. Due caution should be exercised when brands are choosing which social target audience group or hot topic to associate their product(s).

内容为王。就内容营销来看，目前市场主的关注点不在于内容的形式，而是内容能否达成品牌传播任务及与目标群众产生共鸣。因此，对于消费者的深入理解及对于品牌调性与策略的掌握，是内容营销致胜的重要关键。然而，因消费者信息接收碎片化、注意力分散、习惯变化快，在内容展现及互动形式上有更多的变化与要求，品牌在与社交人群的选择与主题/热点的结合上也须更加谨慎。

WINNING POINTS IN CONTENT MARKETING
内容营销的制胜关键

Note: Marketers interviewed 2019 (152), data in %

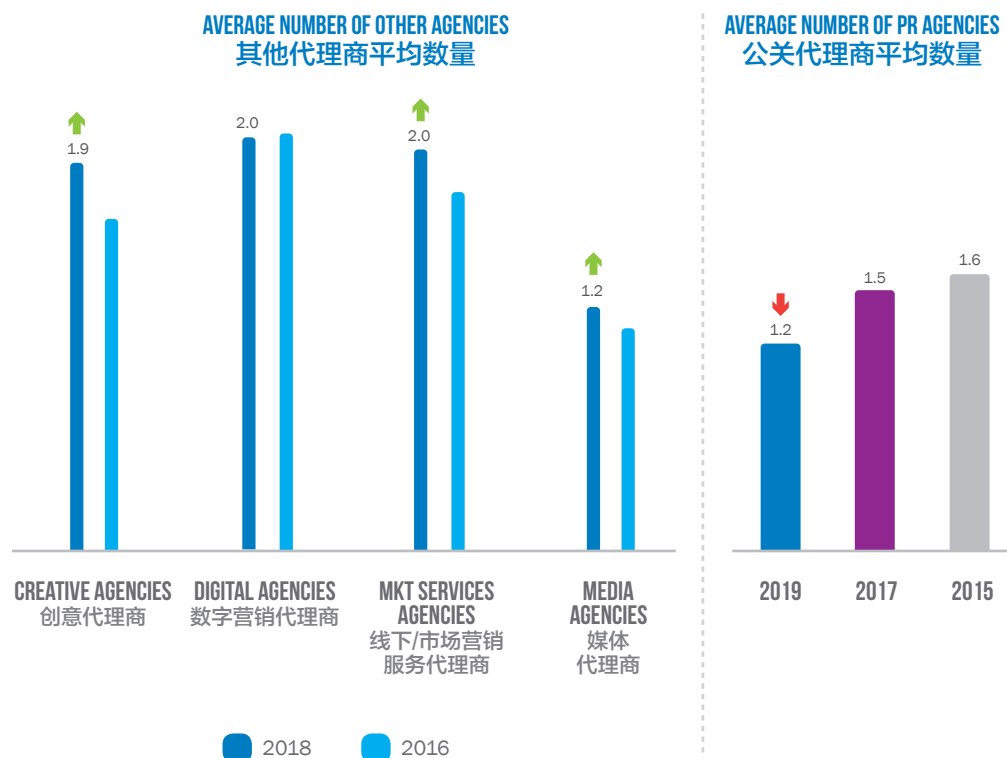
4

THE NUMBER OF PR AGENCIES HAS DECREASED, THOUGH RELATIONSHIPS ARE LASTING LONGER 与两年前相比，市场主与公关代理商合作数量减少，但合作时长略有增加。

Marketers are gradually working with fewer PR agencies. In China, they work with an average of 1.9 advertising agencies, 2 digital agencies, 2 marketing service agencies and 1.2 media agencies.

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。目前，市场主平均与1.9家创意广告代理商、2家数字营销代理商、2家线下/市场营销服务代理商和1.2家媒体代理商进行合作。

NUMBER OF AGENCIES 合作中代理商的数量

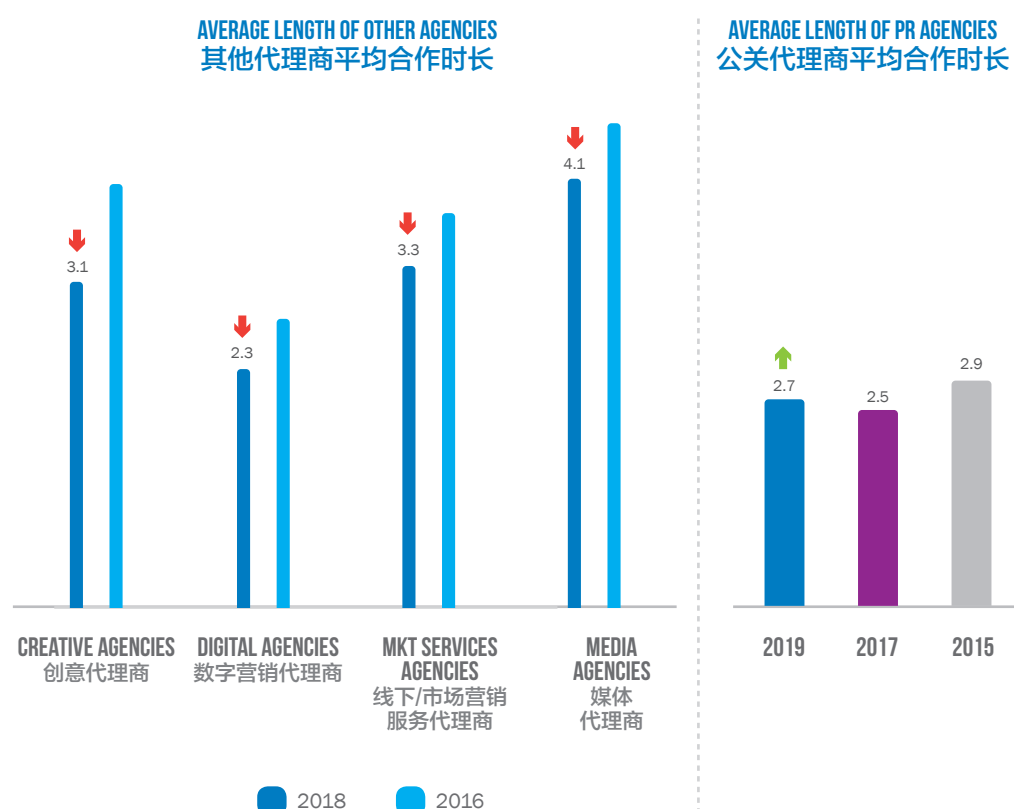


Note: Client-Agency relationships in PR Scope 2019 (176), 2017(232), 2015(215). Data in % and Average.
Client-Agency relationships in Agency Scope 2018: Creative (272), Digital (109), MKT Services (198), Media (167). Data in % and Average.

While the working periods of other types of agencies (creative, digital, marketing service and media) have decreased to an average of 2.9 years (previously 3.8 years in 2016), the length of PR agency relationships has increased to 2.7 years, compared to 2.5 years in 2017.

相较于其他类型的代理商（创意、数字营销、线下市场服务及媒体）的合作时长由2016年的平均3.8年下降为2018年的平均2.9年，公关代理商的平均合作时间由2017年的2.5年上升到现在的2.7年。

LENGTH OF RELATIONSHIPS 合作关系时长



Note: Client-Agency relationships in PR Scope 2019 (176), 2017(232), 2015(215). Data in % and Average.
Client-Agency relationships in Agency Scope 2018: Creative (272), Digital (109), MKT Services (198), Media (167).
Data in % and Average.

This doesn't indicate a more stable relationship between marketers and PR agencies, as the most visible reason for change is attributed to marketers' responsibilities and the scope of PR agencies.

然而，这一结果并不完全代表与公关代理商的关系变稳定，市场主的公关职能变化及代理商服务扩充也是影响要素之一。

5

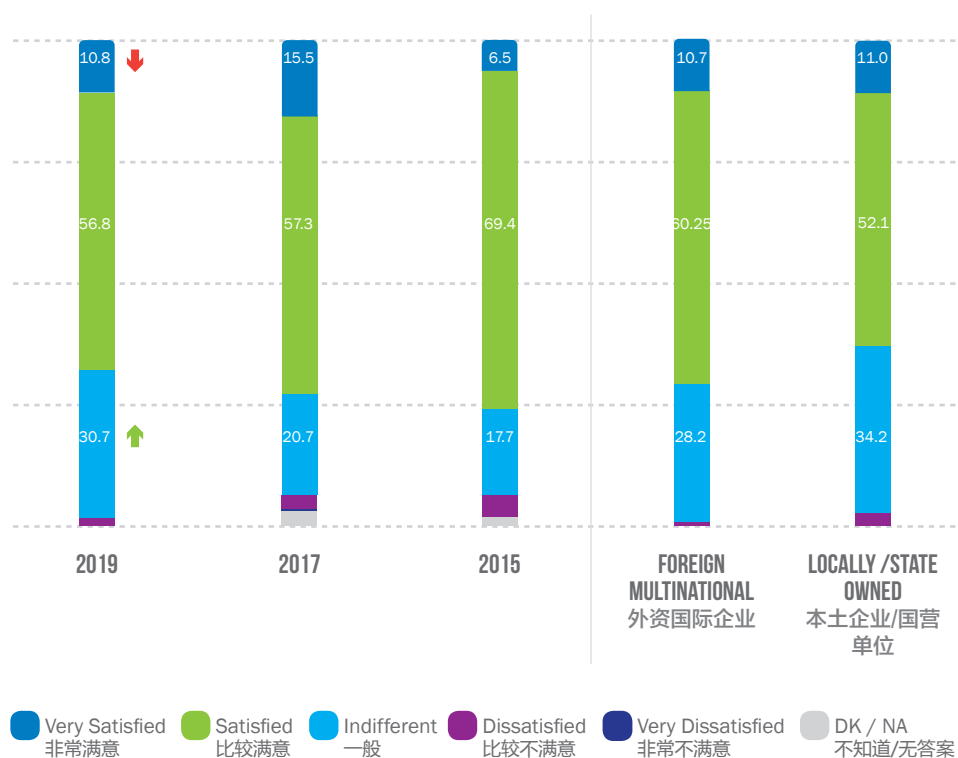
A DOWNTREND IN AGENCY PERFORMANCE ATTRIBUTES AND SATISFACTION LEVELS SHOULD PUT PR AGENCIES ON ALERT

公关代理商的整体/专项表现及满意度皆下滑，暗示潜在危机。略有增加。

67.6% of marketers are currently happy with their PR agency relationship, a slight decrease from 2017. The percentage of “indifferent” responses increased by 10%. Marketers from foreign multinational companies are more satisfied with their current PR agencies. Compared to other types of agencies, only media agencies received a lower satisfaction rating when compared to PR agencies.

67.6%的市场主表示对于正在合作中的公关代理商感到满意，与两年前相比略有下降；相对地，认为现任公关代理商表现一般的受访者增加了10%。其中，本土企业/国营单位的市场主满意度低于外资企业的市场主。与其他类型的代理商满意度相比，公关代理商的合作满意度仅高于媒体代理商。

LEVEL OF SATISFACTION WITH PR AGENCIES 公关代理商合作满意度



Note: Client-Agency relationships 2019 (176), 2017(232), 2015(215). Data in % and Average.

Beyond overall performance, the average mentions of PR specialty decreased, which suggests a lack of notable advantages on performance. The changing trend of PR agency roles tells a different story; those agencies need to enhance their strengths and secure relationships with marketers by establishing long-term and unique roles.

除了整体满意度之外，今年受访者对于服务的公关代理商的专项属性提及数亦大幅减少，显现代理商在实际表现上较少有特别突出的强项或特色。从公关代理商合作形式的变化趋向来看，公关代理商绝不可掉以轻心，需持续强化其专项领域服务强项，争取在合作关系中建立有长期性且更不可被取代的角色。

BEST PRACTICE: USE CLIENT-AGENCY EVALUATION TOOLS TO IMPROVE AND STRENGTHEN PARTNERSHIPS

最佳实践：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

Building relationships is a big challenge for PR agencies. 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. A clear understanding of client expectations, and maintaining an open channel to communicate ongoing or new expectations, reduces the chances of client dissatisfaction becoming an issue.

如何维护与市场主更稳定的合作关系对于公关代理商而言是一大挑战。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。

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

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。

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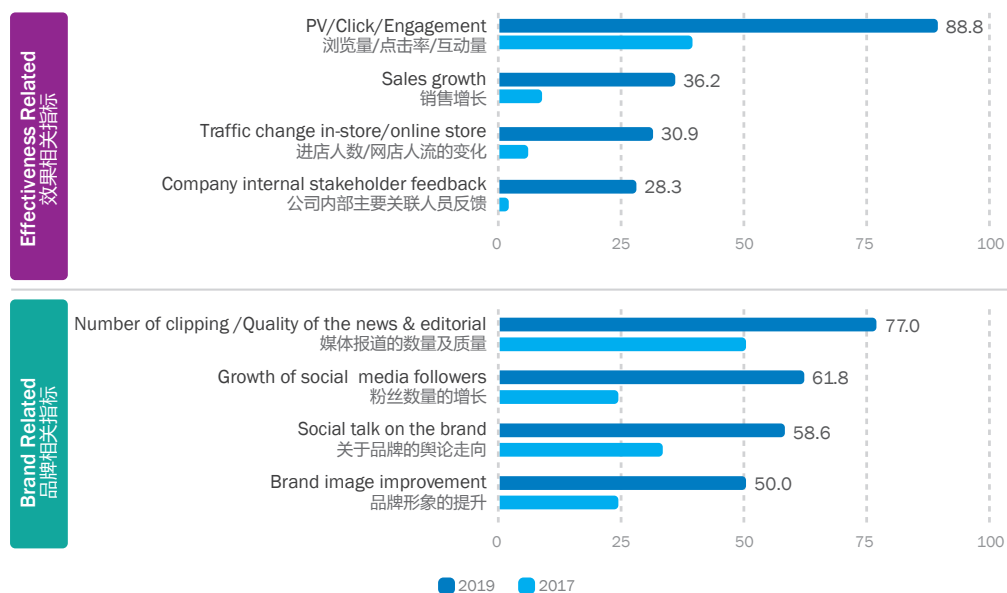
PR AGENCIES FACE MORE KPIS AND INCREASED SCRUTINY WHEN IT COMES TO DIGITAL EFFECTIVENESS

几乎所有的市场主都会对公关代理商设定KPI，与数字相关的考核指标显著上升。

Data from digital media provides opportunities for analysis that go beyond traditional measurement of media effectiveness. It also helps marketers set clearer and more quantified targets for PR agency KPIs. PV/click/engagement, sales growth and traffic changes, both in-store and online, were most frequently mentioned, with the proportion of sales growth surpassing one third, an increase from the last wave.

数字媒体提供了更多可以用数据评估的方式，除了用来评估媒体成效之外，也帮助市场主设定更明确的可量化目标作为公关代理商的KPI。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“销售增长”更是被超过三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。

KPI SETTING 关键业绩指标的设定



Note: Marketers interviewed 2019 (152), 2017(155), data in %

USE MEDIA AUDITING TO GENERATE A HIGHER RETURN ON DIGITAL 最佳实践：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 the area in which 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

MARKETERS ARE SEEKING GREATER DIVERSITY IN PR AGENCIES DURING PITCHES

市场主依据主要工作任务的差异对选择代理商类型进行判断，不同类型代理商之间的竞争优势与界线产生新的变化。

Reflecting changes in agency scope, marketers are less restrictive in the type of agencies they invite to pitches, instead, looking for agencies that have demonstrated strength within that scope.

In PR-related projects, PR agencies have gained an advantage by expanding their service capability, and as a result, have created a greater competitive environment.

相对应于现今代理商工作范畴的变化，市场主在判断寻求代理商来参与比稿时，不一定只限定于某一类型的代理商，考量的关键在依据其主要工作内容/需求的领域，判断哪些类型的代理商具备有相对优势。

因此，市场上出现不同类型代理商在同一个比稿中竞争的状况，也越发地频繁。在公关相关的服务领域中，观察到部分在过往并非属于公关代理商优势的工作内容，在如今的局势变化及代理商服务转型的影响下，公关代理商展现了逐渐茁壮的新竞争优势。

AGENCY SELECTION 选拔代理商

> In terms of your experience on your brand communication effectiveness, which of following communication approach makes more impact on consumers?

就自身品牌的公关传播经验而言，您觉得以下传播方式触及消费者并产生影响的效果如何？

Scope of Work 工作内容	PR Agencies 公关代理商	Creative Agencies 创意代理商	Media Agencies 媒体代理商	Digital/ Social Agencies 数字/社交 代理商	Event/BTL Agencies 线下活动 代理商	In-House- Team 内部团队 负责	We don't have this 不需要 这部分工作
Communication Planning 传播策略	74.34	54.61	17.76	36.84	6.58	31.58	0.00
Creative Idea / Content Development 创意想法/内容开发	49.34	80.92	5.26	50.00	10.53	19.74	0.00
Media Relations 媒体关系	83.55	1.32	33.55	7.89	2.63	13.82	1.97
Media Planning 媒体关系	46.05	5.92	69.08	18.42	1.32	8.55	1.97
CRM/E-CRM 客户关系管理	17.11	0.66	4.61	40.13	9.21	43.42	12.50
Social Media Maintenance 社交媒体维护	48.68	7.24	3.95	78.95	1.32	12.50	0.66
Digital Campaign 社交媒体维护	19.74	13.16	4.61	91.45	1.97	9.21	1.97
KOL Management KOL管理	71.71	7.89	18.42	58.55	4.61	14.47	1.97

Note: Marketers interviewed 2019 (152), 2017(155), data in %

8

PR AGENCIES SHOW ADVANTAGES IN KOL MARKETING 公关代理商在KOL营销领域，较其他类型代理商更占有优势。

KOL marketing is one of the most important and effective communication approaches. Most interviewees mentioned that many KOLs were initially media professionals, so the PR agency with more resources in this area is able to build a stronger, more stable relationship with them. Moreover, content developed by a PR agency is a better match with brand tonality. They are also good at making professional judgments and have control of press direction.

KOL营销是目前非常受市场主重视且效果较好的传播手段之一，大部分受访者表示，KOL多为媒体转型从业者，公关代理商擅长媒体关系，在此方面资源更加丰富，能够在日常沟通中与KOL建立稳定良好的关系。同时公关代理商提供的内容更加软性，较能贴合品牌调性，对于舆论走向也能有更为专业的判断及掌控，更赢得市场主的信赖。

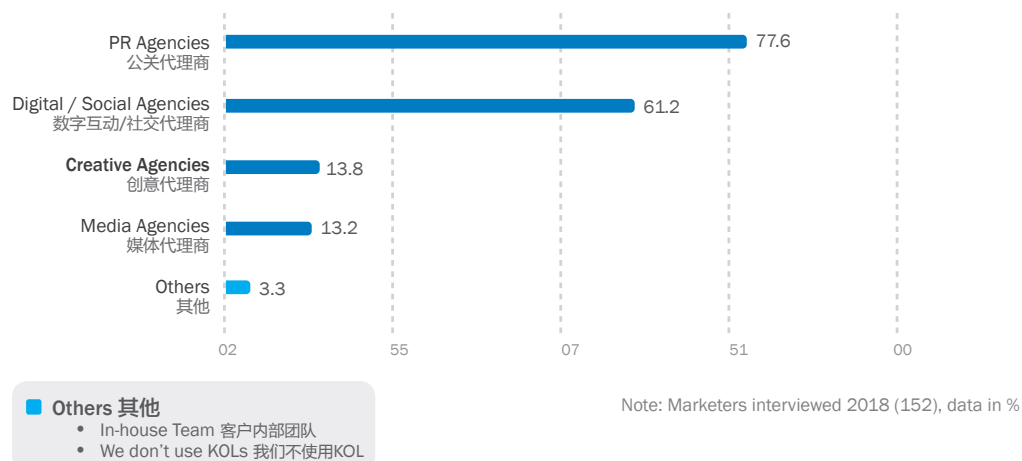
Digital/social agencies have the best understanding of the various digital platforms where most KOLs are active, especially social media. They are also tuned into online sentiment and are able to develop content that is relevant for online audiences. Media agencies are strong in the areas of monitoring tools and data support and help marketers make better decisions about KOL selection using data analysis. In contrast, creative agencies excel at connecting creative ideas with content.

而数字互动/社交代理商则是更了解传播平台的属性，尤其对社交媒体有深入的理解，加上擅长互联网思维，所以内容能够更符合消费者当前的阅读习惯。媒体代理商具备监测工具及数据支持，能够从数据分析的角度帮助市场主在KOL选择上做出决策。创意代理商的优势则是能够将创意与内容更好地结合，新颖有趣的内容更有利于传播。

STRENGTH OF AGENCIES IN KOL MARKETING 代理商在影响者营销领域的优势

> KOL marketing has become one of the key methods for communication. Which type of agencies do you rely on for suggestions about KOL marketing?

KOL营销现今已成为一个重要的传播手段，请问您倾向于信赖何种类型的代理商就KOL营销给出的建议？



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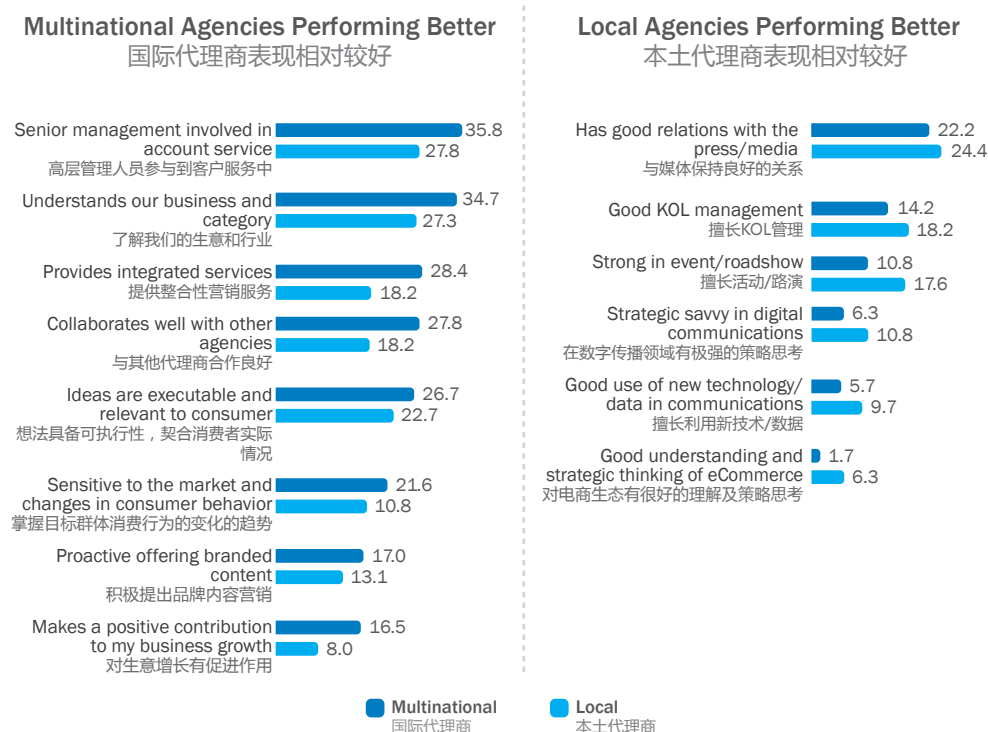
MULTINATIONAL PR AGENCIES PERFORM BETTER THAN LOCAL AGENCIES, WHILE LOCAL AGENCIES REMAIN STRONGER IN DIGITAL

国际公关代理商的表现较本土公关代理商更优，但在数字领域还是本土代理商优势更为明显。

A gap exists between marketer's perceptions and actual agency performance. According to marketers' evaluations, multinational PR agencies perform better than local agencies. However, local agencies perform much better in the area of digital. As part of the initial agency screening process, marketers usually identify agencies based on their perceptions, recommendations, and previous experiences, to minimize any risk related to bias, at this stage, marketers should consult third parties to assist in agency assessment and selection.

总观来看，依据今年受访者对于其服务的公关代理商的实际表现评估，国际代理商的表现是在大多数的属性上是优于本土代理商的，但本土代理商在数字领域还是相对比国际代理商胜出。另外，若比较代理商的市场认知及实际表现，通常会发现认知与其实际强项的差距，而市场主在代理商选拔初期，通常是依赖个人认知、推荐及过往经验来寻找潜力代理商，这个筛选过程有其潜在的缺失，市场主应寻求专业的第三方资讯或助力，提升代理商选拔的精准度。

CURRENT CLIENT'S EVALUATION (MULTINATIONAL VS LOCAL AGENCIES) 合作中代理商表现（国际代理商 vs 本土代理商）



BEST PRACTICE: BUILD THE BEST AGENCY TEAM THROUGH COLLABORATION

最佳实践：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 and the overall agency team. In the midst of a fragmented media space with unlimited channels for communication, it is expected that PR agencies develop specializations in different areas. With deeper knowledge about their capabilities, marketers have a far better chance of choosing the best agency to execute their communications strategy.

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。

Independent third-party consultation can help marketers find an agency with the right fit—or 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 teams, third-party consultants can facilitate marketers to better identify, evaluate, and position agencies to best meet their needs.

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

TRANSFORMATION EFFORTS BY PR AGENCIES ARE MAINLY STRUCTURAL AND ARE YET TO DEMONSTRATE REAL IMPACT FOR CLIENTS

公关代理商转型持续进行，真正效果尚未 明确，宣传角度与对象需再优化。

Both multinational and local agencies are transforming themselves to face the change in communications. However, only 30% of marketers interviewed knew of PR agencies that have done this successfully, compared to 50% of PR professionals. Further analysis revealed that efforts of transformation had not yet shown any actual results, with most opinions based on new actions such as adding internal functions and making structural changes.

因应传播环境的变化，无论是国际或本土公关代理商都积极地在进行转型。当问到是否认为有成功转型的公关代理商时，仅只有30%的市场主认同，公关代理商同仁则较为正面，有一半以

上的受访者认同。然而，当对比被较多提名的成功转型代理商及其被提名的理由，发现多数代理商的实际表现并未反应出其转型效应，市场主的提名理由也较多停留在代理商增加的职能和其架构调整。

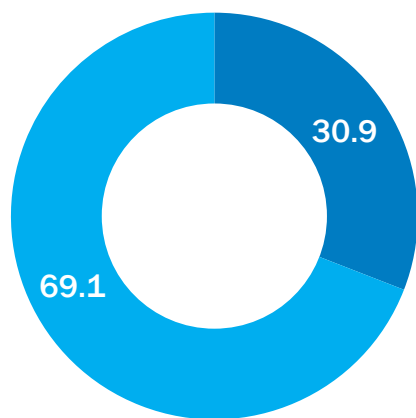
PR agency transformation must be a future forward journey. In addition to internal restructuring and recruiting new talent, more effort needs to be put into building case studies that demonstrate recent successes to gain recognition from marketers.

Special attention needs to be paid to the procurement team, as changing perceptions about PR agency service scope and professional specialty extension will be the key to gaining more opportunities for pitch and service scope.

公关代理商的转型已在无法停止前行的道路上，无论是采取如何的转型方向或作法，代理商除了思考内部如何进行组织调整及人才招聘，更须将关注点放在打造成功案例上，以实际的作为与成果验证其转型能为市场主带来的效益，以强化市场主的认知。同时，需要特别针对采购部门进行沟通，扭转他们对于公关代理商的服务范畴及专项领域扩充的认知，以赢得更多比稿及服务机会。

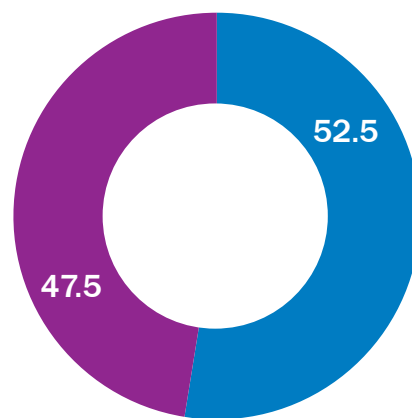
MOST ACTIVE PR AGENCIES IN TERMS OF TRANSFORMATION 最积极转型的公关代理商

Marketers' Opinion
市场主观点



- Yes, there is a successfully transformed agency
有转型成功的代理商
- No, there is no successfully transformed agency
无转型成功的代理商

Agency Professionals' Opinion
代理商同仁观点



- Yes, there is a successfully transformed agency
有转型成功的代理商
- No, there is no successfully transformed agency
无转型成功的代理商

Note: Marketers interviewed 2019 (152), Agency Professionals interviewed 2019 (59).
Data in % and Average.

METHODOLOGY

调研方法



UNIVERSE 研究总体

Our universe is comprised of senior marketers responsible for PR/ Communication in companies currently working with at least one PR agency in China. All senior marketers interviewed were involved in the decision-making process for agency selection and approving the work of their agencies. Interviewees 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 研究样本

152 individuals working in 141 companies with 176 client-agency (PR) relationships were analyzed. In addition to individuals in marketing departments of client companies, we also interviewed the following professionals to complete the study: procurement (32 individuals) and agency professionals (59 individuals).

我们针对141家公司的152位客户的176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（32人）代理商同仁（59人）。



QUESTIONNAIRE 问卷

We used a semi-structured questionnaire with additional open-ended questions that allowed interviewees to provide in-depth responses. 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 Senior Directors did online and phone/face-to-face interviews. Online 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采购专业人员，代理商同仁。



DATES OF FIELDWORK 研究阶段

Interviews with marketers and procurement were conducted from July to September 2018.

Interviews with agency professionals were conducted from September to October 2018.

在2018年7-9月期间，我们进行了市场主管/采购主管的访谈。
在2018年9-10月期间，我们进行了代理商同仁的访谈。

SAMPLE PROFILE 样本概况

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

SAMPLE PROFILE
样本概况

GENDER 性别	2019	2017	2015
Male 男	38.8	30.3	N/A
Female 女	61.2	69.7	N/A

POSITION 职位	2019	2017	2015
President, CEO, GM 总裁, 首席执行官, 总经理	5.3	4.5	5.6
PR/Media Relations Director 公关/媒体关系总监	9.9	14.2	16.1
PR/Media Relations Manager 公关/媒体关系经理	44.7	31.6	26.6
Marketing Director 市场总监	9.2	10.3	16.8
Marketing Manager 市场经理	22.4	14.2	7.0
Brand Director 品牌总监	4.6	7.1	4.2
Brand Manager 品牌经理	8.6	14.2	11.2
Others 其它	8.6	3.9	9.1

CITY 受访者地区分布	2019	2017	2015
Shanghai 上海	50.0	52.3	37.1
Beijing 北京	25.7	34.8	34.2
Guangdong 广东	13.2	7.1	6.3
Other 其它	11.1	5.8	22.4

TENURE (AVERAGE YEARS) 任期 (平均年数)	2019	2017	2015
Current Position 当前职位	4.01	4.02	N/A
Current Company 在该公司任职	5.08	3.75	N/A

ROLE 职责	2019	2017	2015
Director Above 总监级别或以上	26.3	36.1	45.5
Middle Management 非总监级别	73.7	63.9	54.5

Note: Marketers interviewed 2019 (152), 2017(155), 2015(143), 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 Johnson & Johnson. Greg is the co-author of three books, *China CMO*, *Asia CMO*, and *Global CMO*.

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 and Design Masterplan Committee.

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。

ABOUT R3

OUR REASON FOR BEING

In a word, we are about transformation. R3 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 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 a proprietary data pool 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.

ABOUT R3

胜三成立的理由

一言概之，我们致力于为企业转型提供力所能及的帮助。胜三管理咨询公司成立于 2002 年，成立的目的是为满足市场主日益扩大的对于提升广告传播投资回报率以及改进营销效率和有效性的需求。

我们希望帮助市场主其他相关部门做到营销有责。

胜三的背景

成立至今，我们为全球、亚太及本土市场的 100 多家公司提供了多方面的咨询服务，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、欧洲和我们拥有来自美洲、亚太、欧洲的优秀行业人才，以及来自拉丁美洲和非洲的合作伙伴。以及非洲的合作伙伴。通过与三星、可口可乐、强生、VISA、联合利华等跨国品牌在全球范围内的合作，我们积累了涵盖超过 70 个国家可靠的衡量基准数据以及工作流程范本，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

我们是受雇于市场主的独立转型咨询公司，帮助品牌的市场营销更具可衡量性，并对业务影响负责。



胜三的工作方法

- 我们崇尚最优秀的人才，引入拥有市场、代理商及分析经验背景的资深行业专家。
- 我们是一家独立的咨询公司。独立于市场主内部的营销团队或外部的代理商，我们客观可靠且保持透明。
- 我们依托独有数据库作为外部衡量基准来协助市场主进行深入分析营销效果。
- 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我们访问了分布于中国的20个城市，总数超过8万多名消费者，并持续进每三月进行一次调研。
- 我们共同开发了衡量代理商和媒体业绩表现的专利软件。
- 每个月，我们独立追踪超过 500 项代理商新业务，以及100多笔在市场营销领域中收购并购的交易。
- 我们洞察全球最佳实践。我们与想要在不同类别和地区进行最佳营销的公司合作。
- 我们撰写了关于在全球范围内领导数字转型的营销人员的书籍“Global CMO”。
- 我们维护并持续更新关键市场媒体成本的数据库。

推动市场主及其代理商的转型

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触点数据库，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

通过定制化的方法和独有的工具，我们帮助市场主设定有针对性的营销基准参考，并针对您的数字营销策略在您的类别和跨类别中的表现提供咨询服务。

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