



2024  
**CHINA AGENCY SCOPE**  
**中国营销趋势研究**

The Tenth Edition 第十版

An R3 Report

# INTRODUCTION

AGENCY SCOPE is a biennial study on trends within marketer-agency relationships and the perception and image of agencies.

The primary value of AGENCY SCOPE is to provide subscribing agencies with first-hand information on the needs of their clients. The report gives them a unique tool with which to improve and provide new services. It covers trends in the communications and marketing sector, and more specifically, the perception and image of their agency in comparison to all other agencies Chinese marketers work with.

Our Universe of analysis is comprised of the highest-level decision-makers in marketing, communication (IMC, field marketing, digital, and social) and media agencies, from the largest - and most important - marketers in China. To qualify for this survey, participants must be involved in the decision-making process for selecting and approving their agencies' work. Each year, we gather opinions from more than 2,500 marketer interviews.

AGENCY SCOPE China 2023/2024 is the 10th edition of a study that is also conducted in 11 other markets (Spain, Portugal, United Kingdom, Argentina, Brazil, Chile, Colombia, Mexico, South Africa, India and Singapore). This enables us to include global benchmarks in some key indicators. In this edition, we interviewed professionals from 242 different companies in China, with 837 client-agency relationships analyzed.

ShuFen Goh  
Principal, R3

Cesar Vacchiano  
CEO, SCOPEN

《营销趋势研究》是一项两年一度的趋势研究，旨在通过了解市场主-代理商关系进一步了解代理商的最新市场看法及定位。

《营销趋势研究》的主要价值是向订阅代理商提供关于其客户需求的第一手信息。该研究作为一项独特的工具能够帮助代理商改进和提供新的服务。因为报告涵盖了营销传播的主要发现及市场趋势，展现了市场主对代理商的看法并能够与其竞争对手进行比较。

我们的大数据来源于中国领先品牌负责营销传播(整合营销，数字营销、线下营销)和媒介的资深决策人员。每位受访者必须参与选择代理商或与代理商有直接合作接触。每年，我们在全球范围内将采集收录2,500位以上的市场主意见与反馈。

《2023/24中国营销趋势研究》是在中国发表的第十版。类似的调研也在全球范围内的其他11个市场同步开展(包括西班牙、葡萄牙、英国、阿根廷、巴西、智利、哥伦比亚、墨西哥、南非、印度、新加坡),因此在一些关键指标上,我们能够与一些国外市场基准进行比较。此次在中国开展的调研中,我们共采集到了来自242家中国/跨国企业的品牌主意见与反馈,并分析837个市场主-代理商合作关系。

吴淑芬  
胜三 总裁

万盛安  
总裁/首席行政官

# METHODOLOGY

## DATA UNIVERSE

## 分析数据来源

Managers who are responsible for marketing, communications, digital, and media in **China**.

Their company must be currently working with at least one communication or media agency. Participating professionals must have been involved in the decision-making process for selecting agencies and approving the work of their agencies. They must also have interacted with communication-media agencies on an ongoing basis. In addition to R3-SCOPEN's databases, leading agencies in China were asked for a list of their most important clients, who collectively were approached by our interviewers.

在**中国**负责市场营销、数字传播和媒介的管理人员。

受访人员所在的公司就现阶段，必须至少与一家在中国的营销传播或媒介代理商处于合作关系中。每家公司的受访人员，必须能够直接参与挑选以及评估代理商的工作。

同时，他们必须持续性的处理与营销传播或媒介代理商相关的选择与评估。除了R3-SCOPEN自有的数据库之外，国内领先的代理商也提供了他们的主要客户名单，以确保更多资深市场主参与本次访谈与研究。

### SAMPLE 样本

**323 individuals working in 242 client companies where 837 client-agency relationships were analyzed (IMC, Retail Marketing, and Media).**

These individuals work in the marketing departments of client companies.

**在242家公司工作的323位受访客户，分析了837个客户-代理商关系(包括整合营销、线下营销和媒介代理商)。**

受访者皆在品牌方的营销相关部门工作。

## TECHNICAL DATA 研究数据

A total of 323 Professionals Interviewed 共访谈了323位市场主

	2022	2024
<b>Marketing Professionals Interviewed</b> 受访客户	<b>396</b>	<b>323</b>
Working with <b>Communication Agencies</b> 受访客户参与营销传播代理商评估人数	332	255
Working with <b>IMC Agencies</b> 受访客户参与整合营销代理商评估人数	<b>264</b>	<b>212</b>
Working with <b>Activation Agencies</b> 在线下营销服务代理商合作	45	48
Working with <b>Digital &amp; Social Agencies</b> 受访客户参与数字营销代理商评估人数	194	-
Working with <b>Media Agencies</b> 受访客户参与媒介代理商评估人数	189	165
<b>Client-Agencies Relationships Analysed</b> 客户与代理商关系分析	<b>891</b>	<b>837</b>
<b>Communication Agencies</b> 受访客户参与营销传播代理商评估人数	670	627
<b>IMC Agencies</b> 受访客户参与整合营销代理商评估人数	<b>447</b>	<b>426</b>
Working with <b>Activation Agencies</b> 在线下营销服务代理商合作	54	74
<b>Digital &amp; Social Agencies</b> 受访客户参与数字营销代理商评估人数	258	-
<b>Media Agencies</b> 受访客户参与媒介代理商评估人数	221	210

\* DIGITAL & SOCIAL AGENCIES are been evaluated as IMC AGENCIES in 2024

\* 2024年，数字营销代理商被包含在整合营销代理商中进行评估

**QUESTIONNAIRE**  
问卷

**Semi-structured questionnaire with further open-ended questions** was used to allow interviewees to provide in-depth opinions. All quotes referring to each subscribing agency are included in Individual and Confidential reports prepared for that specific agency.

**半结构式的问卷与开放式的问题**, 引导受访者提供更深入的意见。所有涉及到关于订阅代理商的引述, 都包含在为订阅代理商定制的机密性报告中。

**TYPE OF INTERVIEW**  
访谈形式

**Face-to-face (F2F) video call interviews through a CAWI system (Computer Aided Web Interview).** The average duration the interviews was 60 minutes.

**通过 CAWI 系统 (计算机辅助网络访谈) 进行的面对面 (F2F) 视频通话访谈 (70%) 和电话访谈 (30%)。** 访谈时间平均为 60 分钟。

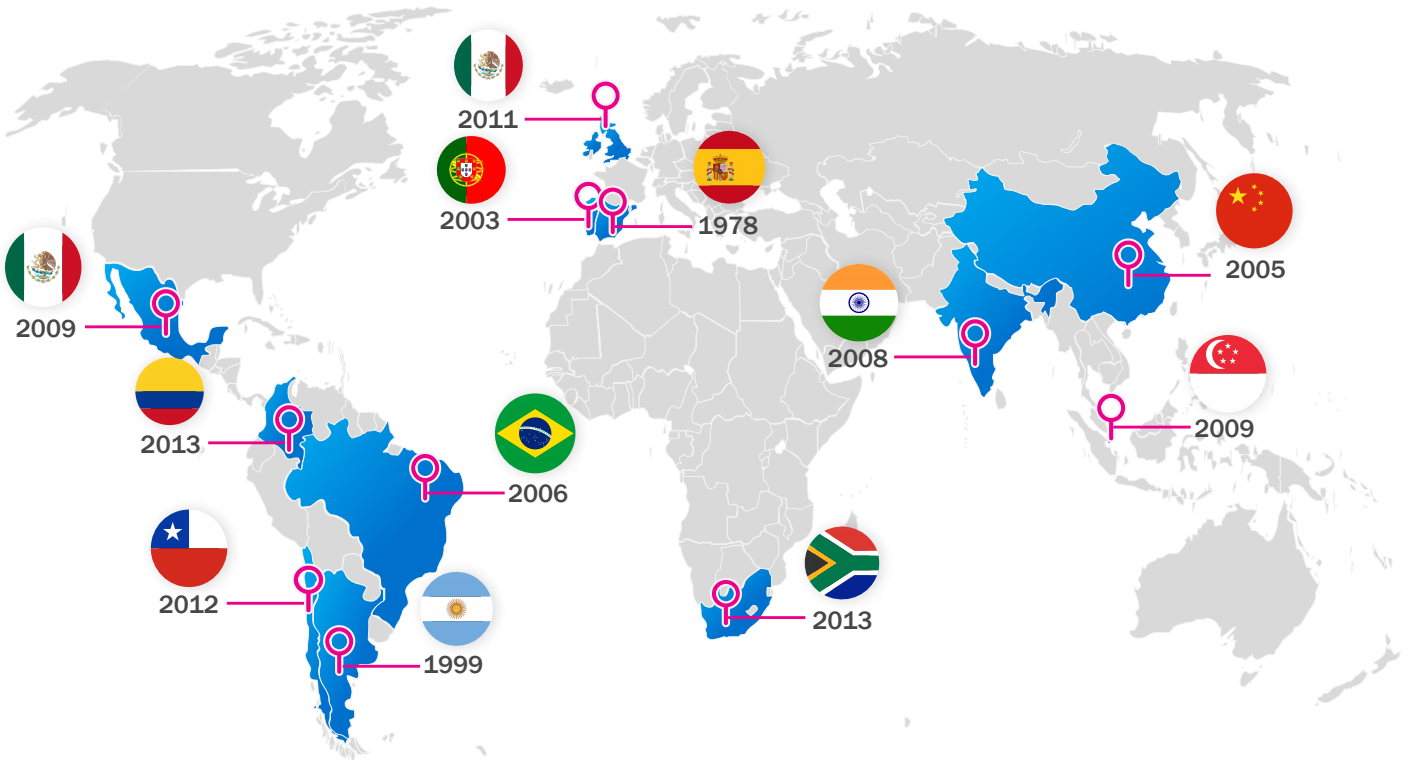
**DATE OF FIELDWORK**  
调研阶段

Interviews were conducted from **August to November 2023.**

**2023年8月至11月**

## AGENCY SCOPE IS CURRENTLY DEVELOPED IN 12 COUNTRIES

### 营销趋势研究在全球12个国家中展开调研



Country	Argentina	Brazil	Chile	Colombia	Mexico	Spain	Portugal	UK	China	India	Singapore	South Africa
Latest Edition	2023/24	2022/23	2023/24	2022/23	2023/24	2022/23	2023/24	2021/22	2023/24	2021/22	2009/10	2023/24

# RESPONDENTS BY JOB FUNCTION & ROLE

## 参与访谈的市场主职能分布

Respondents were drawn from a cross section of job functions and roles to ensure balance. 44.2% operate at the Director level, with 55.8% defining their role as Marketing Director/Manager.

我们邀请了众多职能和职位各异的受访者，以确保研究样本的平衡，中立与完整。44.2%的受访者为总监或以上级别，55.8%的受访者为非总监级别。

### SAMPLE PROFILE 访谈概况

Interviewee Particulars 受访者信

Gender 性别	2022	2024
Male 男	36.6	33.4
Female 女	63.4	66.6

Role 职责	2022	2024
Director Above 总监级别或以上	44.4	44.2
Middle Management 非总监级别	55.6	55.8

Tenure (Average Years) 任期 (平均年数)	2022	2024
Current Position 当前职位	5.6	6.7
Current Company 在该公司任职	3.6	5.7

Type of Company 公司类型	2022	2024
Chinese Multinational Business/Brand 本土跨国企业	18.4	7.5
Foreign Multinational 外资国际企业	68.4	74.4
Local Business/Brand 国内本土企业	13.1	17.9
State Owned 国营单位	-	0.3

\* Other 其它 Operations Director 业务主任 (0.6), Strategic Planning Director 战略规划主任 (0.3), BTL Director 线下营销服务主任 (0.3) and 'Other' 和“其他” (3.1).

Note: **Marketing Professionals** interviewed in **2022** (396) and **2024** (323). Prompted and Spontaneous Questions. Data in Percentages (%) and Averages (Years).

City 受访者地区分布	2022	2024
Shanghai 上海	51.0	57.1
Beijing 北京	18.4	15.3
Guangdong 广东	18.2	6.3
Other Cities in China 其他城市	11.9	21.1
Other Countries 其他城市	0.5	-

Position 性别	2022	2024
President, CEO, GM 总裁, 首席执行官, 总经理	5.6	4.9
Marketing Director/Marketing Manager 市场总监, 市场经理	23.5	14.9
Brand Director/Manager 品牌总监, 品牌经理	36.6	15.3
Communications Director 传播总监	1.8	6.8
Media Director 媒介总监	12.4	5.8
Digital Director/Manager 数字营销总监/数字营销经理	5.8	29.2
Trade Marketing Director 市场渠道营销总监	3.0	8.4
Procurement Director 采购总监	-	10.1
New Business Director/Sales Director 业务拓展总监/销售总监	4.0	0.3
Other* 其他	7.3	4.3



# RESPONDENTS BY INDUSTRY

## 参与访谈的市场主行业分布

FMCG represents the largest percentage of survey respondents (45.1%). China's automotive industry has returned to growth after a period of budget restrictions following a slowing market. The focus is now on improving marketing efficiency so that marketing professionals can direct their energies to strategic planning for the future; hence an increase to 11.4%.

快消品品牌仍为需要大量使用外部伙伴的行业，占本次受访总量45.1%。汽车行业在经历了过去几年预算收紧，工作范畴的内缩后，最终仍是将大部分的营销产出交还于合作伙伴手中，希望借此提高产出效率，供营销专职人员专注于战略规划，以抢占激烈市场。因此在本次受访人员中，数量占比上升至11.4%。

## SAMPLE PROFILE 访谈概况

Interviewee Particulars 受访者信

Sector 行业种类	2022	2024
<b>FMCG</b>	<b>48.0</b>	<b>45.1</b>
Fast Moving Consumer Goods 快销品	19.2	13.6
Beverages 饮料	10.6	12.3
Beauty, Cosmetics & Personal Care 美容, 化妆品, 个人护理	8.3	12.3
Household Products 家居用品	2.0	0.6
Healthcare/Pharmaceutical 保健/药品	7.8	6.2
<b>Durable Goods</b>	<b>19.8</b>	<b>28.2</b>
Household Furnishings & Appliances 家用家具, 电器	4.5	4.5
Automotive 汽车	7.8	11.4
Jewellery & Watches 珠宝/手表	1.5	5.5
Retail/Apparel 零售/服装	4.5	3.6
Sporting Goods 体育用品	0.5	1.6
Office Furniture & Supply 办公设备, 办公家具及办公用品	1.0	1.6

Sector 行业种类	2022	2024
<b>Services</b>	<b>25.3</b>	<b>25.6</b>
Finance & Insurance 金融/保险	2.5	1.6
Telecoms 电信	10.9	2.9
Public & Private Services 公共和私人服务	0.5	4.5
Travel/Tourism 旅游	2.8	2.3
Restaurants 餐厅	0.5	0.6
Energy/Fuels & Oils 燃油及润滑油	1.5	1.9
Building Materials & Farming 建筑材料, 机械, 农用设备	1.8	6.2
Culture, Education & Media 文化, 学校, 娱乐及媒体	4.8	4.2
Property/Real Estate 房地产	-	1.3
<b>Other</b>	<b>6.8</b>	<b>1.1</b>

Note: **Marketing Professionals** interviewed in **2022** (396) and **2024** (323).  
Prompted and Spontaneous Questions. Data in Percentages (%) and  
Averages (Years).

# PARTICIPATING COMPANIES 受访公司

323 professionals, working in 242 companies/brands, were interviewed, 43% agreed to appear as participants

参与企业 ( 323位市场主受访, 来自242家受访公司/品牌, 43% 市场主同意公开展现 Logo )



# 10 KEY FINDINGS 十大主要洞察

The R3-SCOPEN 2024 AGENCY SCOPE study provides an in-depth look at China's advertising industry, exploring trends in client-agency partnerships, selection, and remuneration. In the following pages we highlight 10 key findings that provide an overview of how the landscape is changing. Also included are best practice recommendations to help marketers and their agencies leverage these trends.

R3-SCOPEN 2024 营销趋势研究对中国传播行业进行了深入观察，探索了客户与代理商合作伙伴关系，代理商甄选标准和费用方面的趋势。在接下来的几页中，我们重点展开了10个主要发现，这些发现概述了营销与合作趋势的变化，也提供了相应的最佳实践建议，以帮助营销人员及其代理商更有效地利用这些趋势。

## 1 'Best-in-Class' agency model is most preferred

专项代理商协同合作仍为主流代理商模型

In China, marketers work with an average of 12 partners to solve their diverse and specialized communication needs. This has been a consistent finding since the first edition of AGENCY SCOPE in China. IMC (3.7) and Activation Agencies (3.1) are the most common and numerous agencies engaged by individual brands.

在中国，营销人员平均要与 12 家代理公司合作，以满足其多样化和专业化的传播需求。这延续了《中国营销趋势研究》自在中国推出第一版以来的一贯结论。其中，品牌最常用的，数量最多的合作伙伴关系为整合营销代理商（3.7 家）和线下营销服务代理商（3.1 家）。

## 2 Greater value placed on strategy

策略的价值更甚以往

We asked marketers what type of agency they would prefer to work with to solve their creative needs. 70.0% (74.2% in 2022) of respondents stated they would prefer to work with specialised agencies across different disciplines. 26.4% (13.63% in 2022) stated they would prefer to work with an IMC agency. The slight shift away towards IMC agencies is a reflection that clients are focusing more on Strategic Planning and Digital Strategy, and are attracted to agencies that demonstrate full-funnel thinking.

我们询问营销人员更愿意与哪种类型的代理商公司合作，以解决他们的创意需求。70.0%（2022 年为 74.2%）的受访者表示，他们更愿意与不同领域的专业代理商合作。26.4%（2022 年为 13.63%）的受访者表示他们更愿意与整合营销代理商合作。受访者略微倾向于整合营销代理商，这反映出客户更加关注战略规划和数字战略，并被能够展现全渠道思维的代理商所吸引。

## 3 A focus on short-term performance prevents deep relationships

对于短期表现的侧重，深深影响着长期合作关系的建立

Client-agency relationships in China tend to be of shorter tenure and more project-based. This is both a challenge for clients trying to consolidate, as well as for agencies securing and driving growth.

在中国，客户与代理公司之间的关系往往持续时间较短，且更多以项目为基础。这既是客户试图巩固关系的挑战，也是代理公司确保和推动业务增长的挑战。

## 4 Clients want agencies to make them smarter

客户寄期望于代理商，赋能品牌最前沿的科技与营销实例

The most effective way for agencies to increase visibility and connect with potential clients is to tap into marketers' desire to be in-the-know. This can be sharing thought leadership through reports, on in-person.

对于代理公司来说，提高知名度并与潜在客户建立联系的最有效方法就是借助营销人员对新事物新环境新技术的渴求。通过面对面的分享，定期报告、案例分享以建立联系，满足以上需求。



## 5 Marketers are impressed by local breakthrough work

与备受赞誉的本土品牌合作的经验很重要

Local Chinese consumer knowledge remains a key criteria when selecting an agency. Working for successful local brands like Luckin Coffee, Hey Tea, and Manner Coffee, makes a difference.

对中国消费者的了解仍然是选择广告公司的关键标准，广告主重视并推崇与瑞幸咖啡、喜茶和 Manner Coffee 等本土品牌的合作。

## 6 There is no replacement for the fundamentals

核心工作的重要性与无可替代性

Creativity, Innovation, Knowledge (market, clients, brands, trends), Good Professional Team, ROI, and Strategic Planning are the fundamental pillars on which day-to-day work is built. They are also 'determinant or important' factors in agency selection.

创意-创新、知识（市场、客户、品牌、趋势.....）、优秀的专业团队、投资回报率和战略规划是日常工作的基本支柱，也是选择代理商时的“决定性或重要”因素。

## 7 Marketing complexity and competitiveness have raised client expectations

市场的复杂性和竞争性侧面提高了客户预期

Agencies need to offer more value-added services, alliances, and collaborations to differentiate themselves and help clients cut through a challenge market.

代理商需要提供更多的增值服务、联盟和合作，如联合品牌合作，以实现差异化，帮助客户在市场中脱颖而出。

## 8 Clients tend to be detractors, not promoters

永远有更高期待，难以满足的市场主

Even though NPS (Net Promoter Score) has increased in the last two years, the number of detractors remains higher than promoters, confirming that China clients are hard to satisfy.

尽管NPS（净推荐指数）在过去两年有所上升，但不满者的数量仍然高于拥护者，这证明中国客户很难让人满意。

## 9 Proving performance to justify investment

亟需可供衡量的实际表现以证明投资有效性

Strengthening brand positioning, driving ROI, and protecting marketing budgets are the main challenges for China marketers.

进一步加强品牌定位（在疫情期间大多都失去了品牌定位）、实现更高的投资回报率以及克服营销投资下降的问题，仍是营销人员面临的主要挑战。

## 10 Marketers look to creativity to break through clutter

以创意来突破杂乱无章的竞争环境

Helping clients stand out in saturated market in a way that strengthens brand positioning, consideration and audience connection, is key to retaining and winning new accounts for agencies.

通过强化品牌定位、品牌考虑度和与受众的联系，帮助市场主及其负责的品牌在饱和的市场中脱颖而出，这是代理商维系现有与赢得新合作关系的关键。

## FINDING 1

# ‘Best-in-Class’ agency model is most preferred

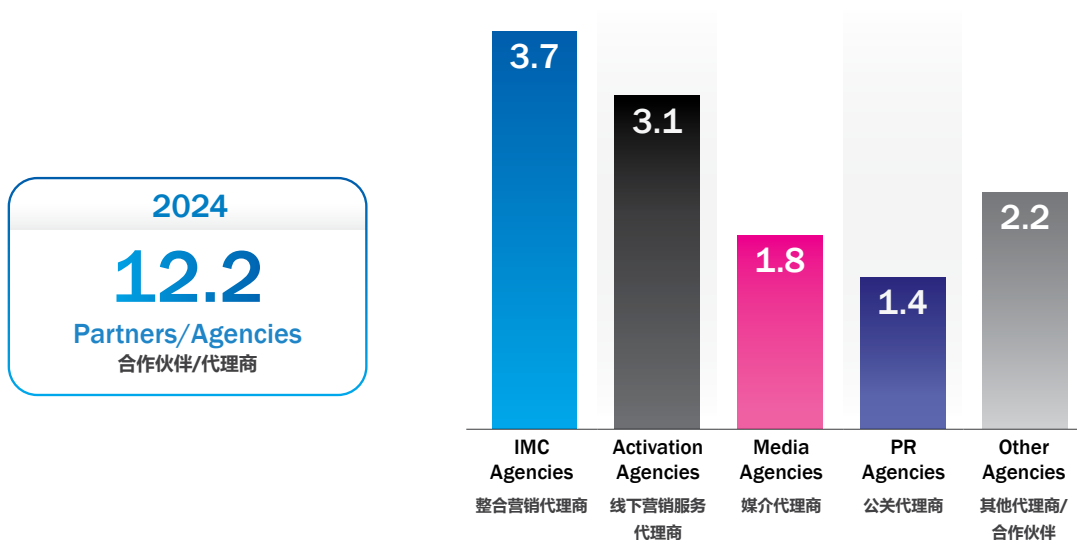
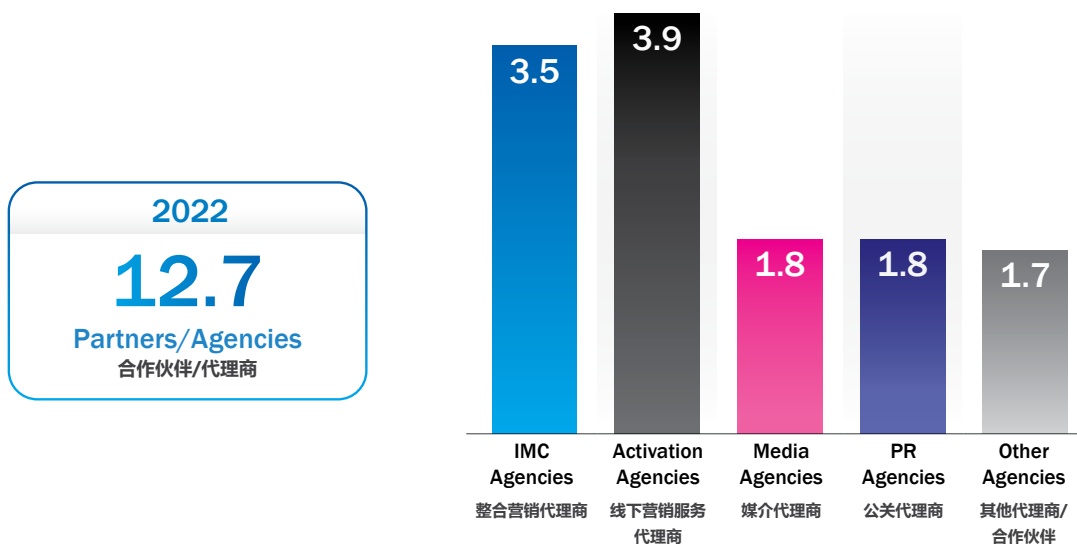
## 专项代理商协同合作仍为主流代理商模型

In China, marketers work with an average of 12 partners to solve their diverse and specialized communication needs. This has been a consistent finding since the first edition of AGENCY SCOPE in China. IMC (3.7) and Activation Agencies (3.1) are the most common and numerous agencies engaged by individual brands.

在中国，营销人员平均要与 12 家代理公司合作，以满足其多样化和专业化的传播需求。这延续了《中国营销趋势研究》自在中国推出第一版以来的一贯结论。其中，品牌最常用的，数量最多的合作伙伴关系为整合营销代理商（3.7 家）和线下营销服务代理商（3.1 家）。

### Structure of Companies (Marketers) 公司架构

12 different agencies to solve marketers' needs (in marketing communication/media)  
平均有 12 个不同的外部合作伙伴解决营销人员传播需求(涵盖营销，媒介等多方面)



Note: *Marketing Professionals* interviewed in 2022 (377) and 2024 (305). Spontaneous Questions. Data in average of number of partners.

## FINDING 2

# Greater value placed on strategy

## 策略的价值更甚以往

We asked marketers what type of agency they would prefer to work with to solve their creative needs. 70.0% (74.2% in 2022) of respondents stated they would prefer to work with specialised agencies across different disciplines. 26.4% (13.63% in 2022) stated they would prefer to work with an IMC agency. The slight shift away towards IMC agencies is a reflection that clients are focusing more on Strategic Planning and Digital Strategy, and are attracted to agencies that demonstrate full-funnel thinking.

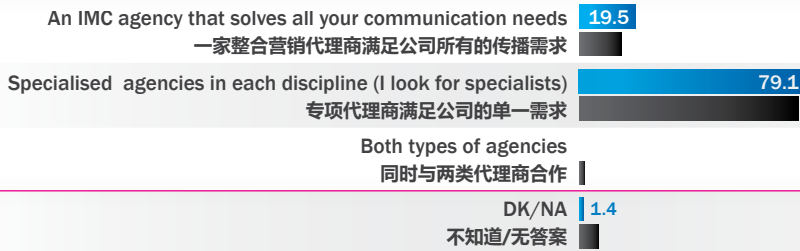
我们询问营销人员更愿意与哪种类型的代理商公司合作，以解决他们的创意需求。70.0% (2022 年为 74.2%) 的受访者表示，他们更愿意与不同领域的专业代理商合作。26.4% (2022 年为 13.63%) 的受访者表示他们更愿意与整合营销代理商合作。受访者略微倾向于整合营销代理商，这反映出客户更加关注战略规划 and 数字战略，并被能够展现全渠道思维的代理商所吸引。

### Structure of Companies (Marketers) 公司架构

Integration vs. Specialisation 整合营销代理商 vs. 专项代理商

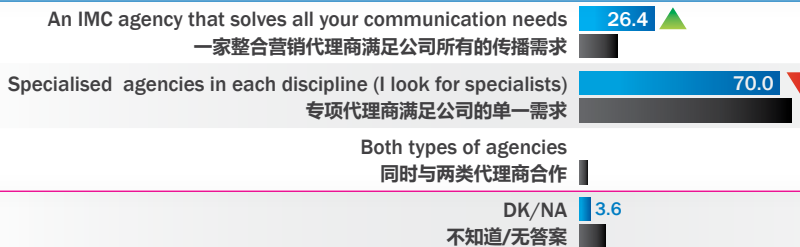
What is your current working model with your agency partners?  
您与现有代理商之间的合作模式是怎样的

2024 2022



If it was your decision, in the future who would you prefer to work with?  
如果由您来决定，您认为哪种合作模式是最理想的

2024 2022



Note: Marketing Professionals interviewed in 2022 (198) and 2024 (277). Prompted Questions. Data in Percentages (%).

FINDING 3

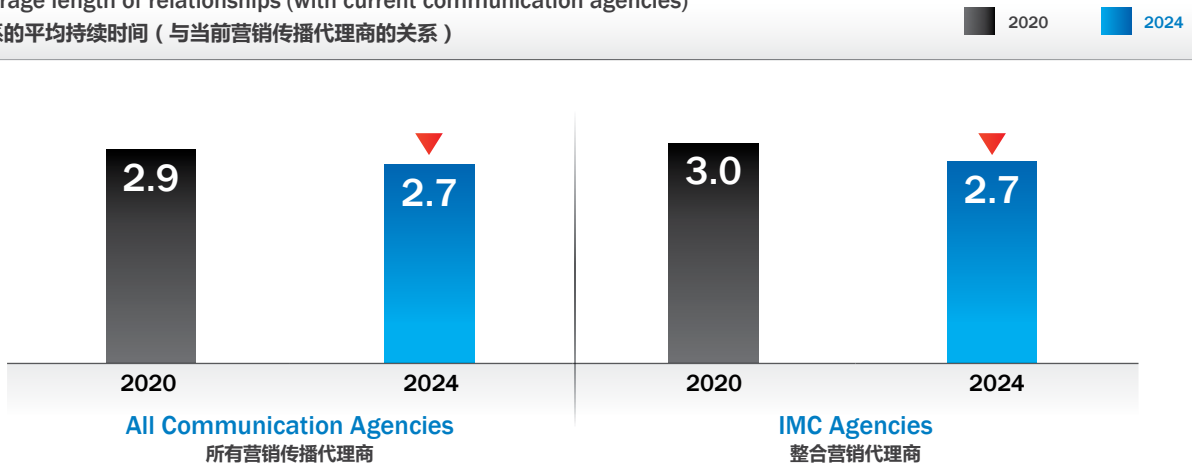
**A focus on short-term performance prevents deep relationships**  
**对于短期表现的侧重，深深影响着长期合作关系的建立**

Client-agency relationships in China tend to be of shorter tenure and more project-based. This is both a challenge for clients trying to consolidate, as well as for agencies securing and driving growth.

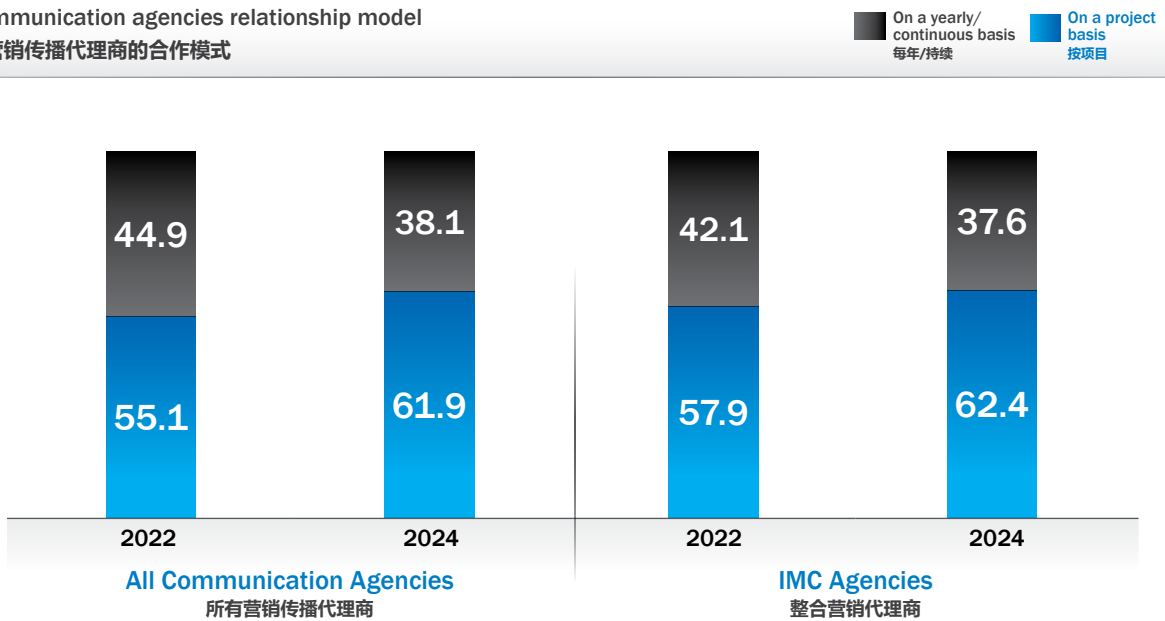
在中国，客户与代理公司之间的关系往往持续时间较短，且更多以项目为基础。这既是客户试图巩固关系的挑战，也是代理公司确保和推动业务增长挑战。

**Client-Agency Relationships 客户与代理商合作关系**

Average length of relationships (with current communication agencies)  
 关系的平均持续时间（与当前营销传播代理商的关系）



Communication agencies relationship model  
 与营销传播代理商的合作模式



Note: Accounts analysed in 2020 and 2024 (All communication agencies: 509/27, 'work with IMC agencies': 287/426). Prompted Question. Data in Percentages (%).

FINDING 4

# Clients want agencies to make them smarter

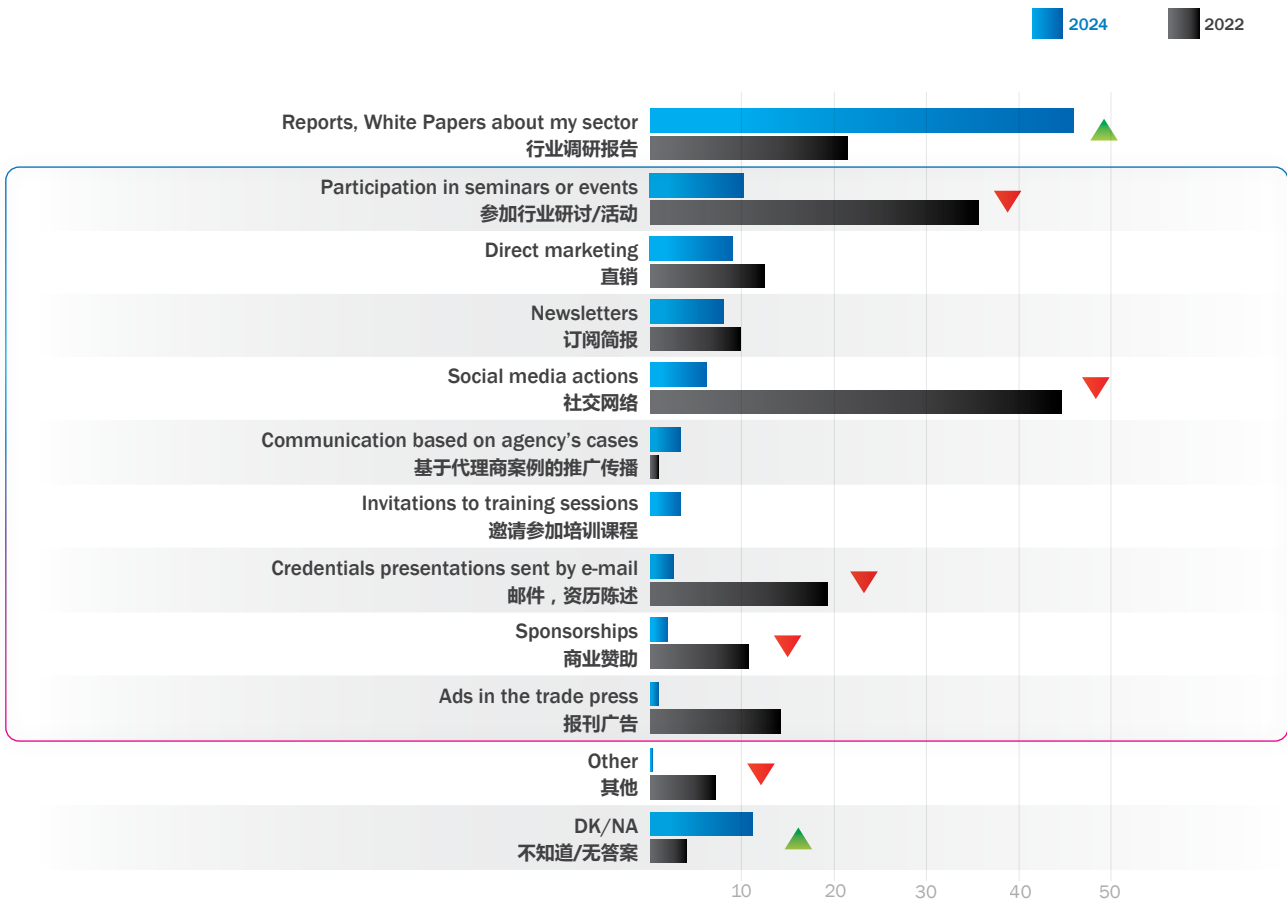
## 客户寄期望于代理商，赋能品牌最前沿的科技与营销实例

The most effective way for agencies to increase visibility and connect with potential clients is to tap into marketers' desire to be in-the-know. This can be sharing thought leadership through reports, on in-person. "Sharing research about my sector" (45.9% vs. 21.4% in 2022), and "Invitations to events, conferences, seminars" (10.2% vs. 35.6% in 2022) are the two best ways agencies can engage with marketers.

代理商提高知名度和与潜在客户联系的最有效方式是通过报告或实时分享代理商洞察，因为客户希望了解市场最新发展情况。“分享我所在行业的研究”（45.9% 对比起 2022 年的 21.4%）和“邀请参加活动、会议、研讨会”（10.2% 对比起 2022 年的 35.6%）是广告公司与营销人员互动的两种最佳方式。

### Agency Communication & PR 代理商传播渠道及公关方式

Ways of communicating with marketers 与营销人员沟通的方式



Note: Marketing Professionals interviewed in 2022 (323) and 2024 (305). Prompted Question. Data in Percentages (%).



FINDING 5

Marketers are impressed by local breakthrough work

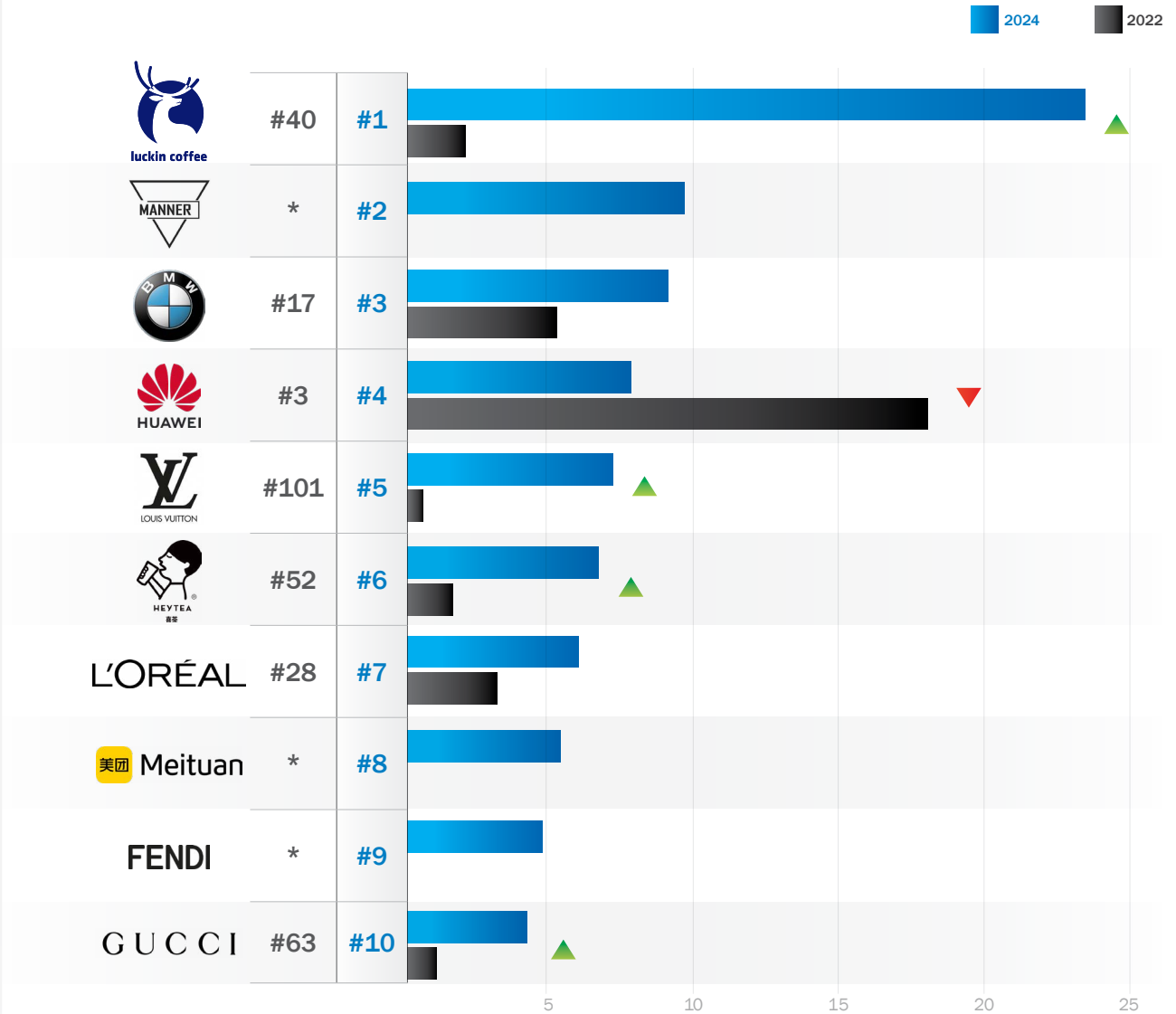
与备受赞誉的本土品牌合作的经验很重要

Agency expert knowledge of the Chinese consumer remains a key criteria in agency selection. Luckin Coffee, Manner Coffee, and BMW are the three brands mentioned the most for their campaigns in past 2 years. While Apple, Luckin Coffee, and Nike are considered the three most valued companies for their Marketing in China.

广告公司对中国消费者的专业了解仍然是选择代理商公司的关键标准。在过去两年中，瑞幸咖啡、Manner Coffee和宝马是被提及最多的三个品牌。而苹果、瑞幸咖啡和耐克则被认为是在中国市场上营销价值最高的三家公司。

Agency Communication & PR 代理商传播渠道及公关方式

Best campaigns from the last two years 过去两年中最受瞩目的活动



Note: Marketing Professionals interviewed in 2022 (185) and 2024 (164). Spontaneous Question. Data in Mentions and Ranking (#)

FINDING 6

# There is no replacement for the fundamentals

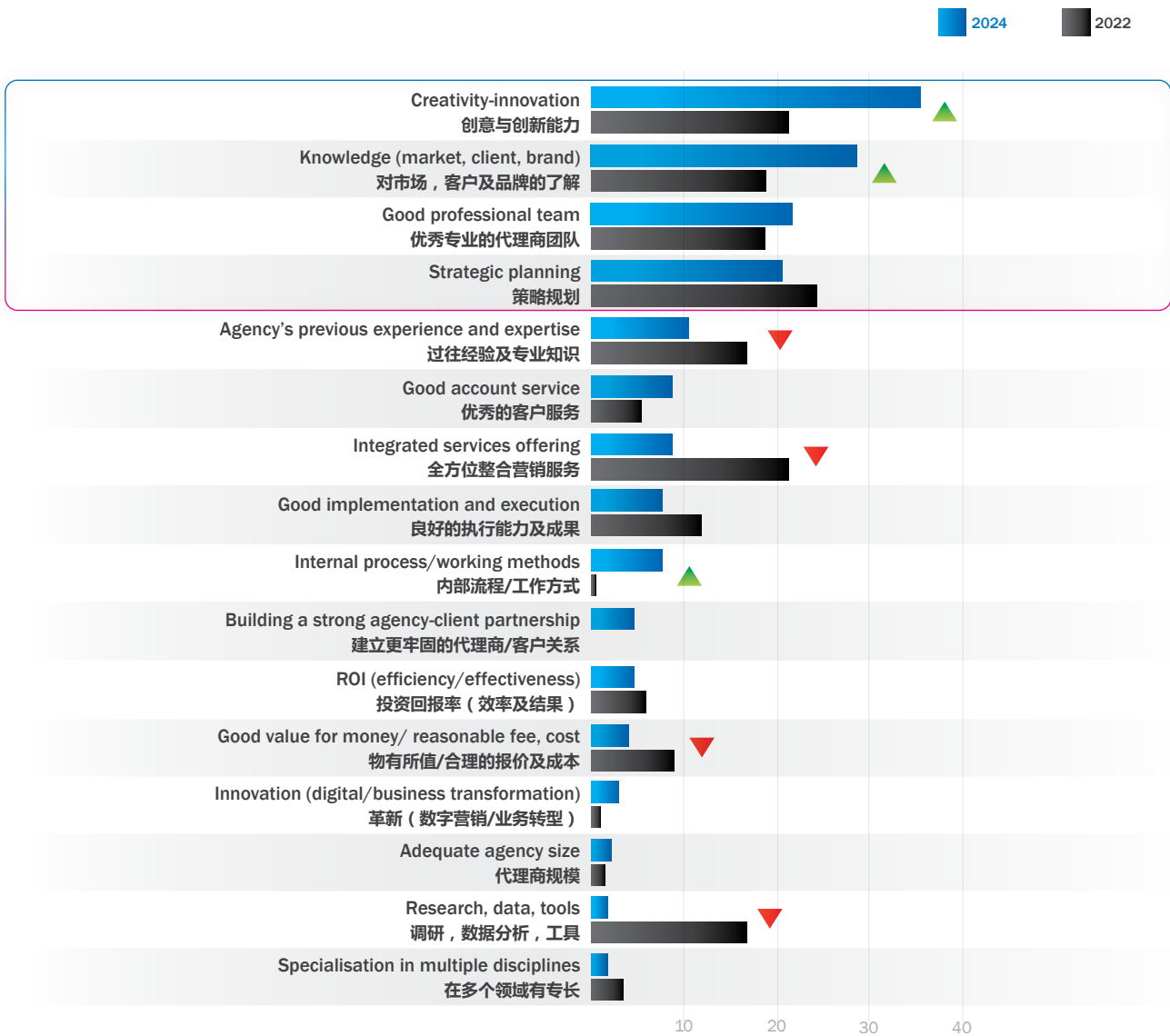
## 核心工作的重要性与无可替代性

Creativity, Innovation, Knowledge (market, clients, brands, trends), Good Professional Team, ROI, and Strategic Planning are the fundamental pillars on which day-to-day work is built. They are also ‘determinant or important’ factors in agency selection.

创意、创新、知识（市场、客户、品牌、趋势）、优秀的专业团队、投资回报率和战略规划是日常工作的基本支柱。它们也是选择代理商公司的“决定性或重要”因素。

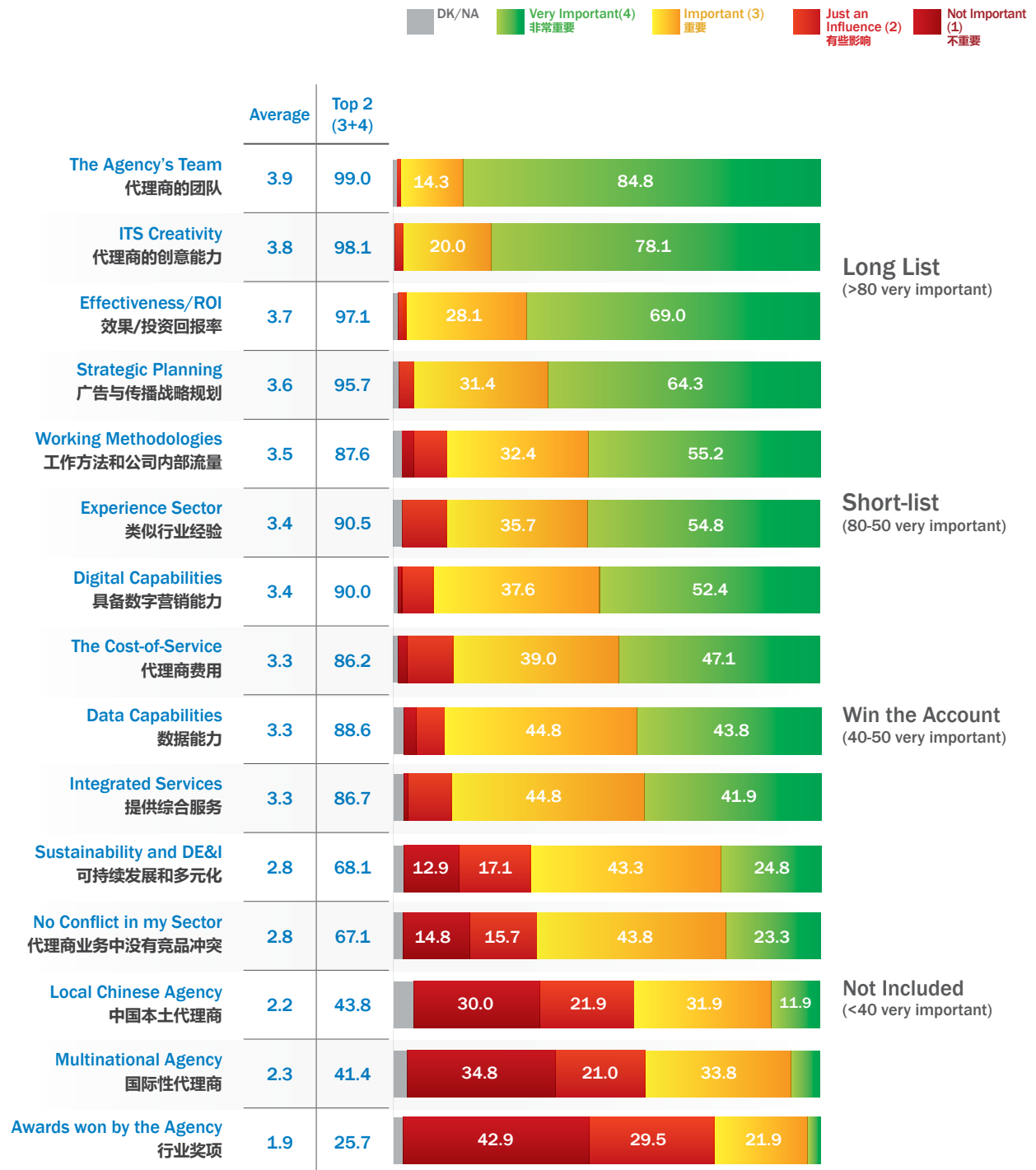
### Agency Selection 代理商选择

Characteristics of ‘ideal’ integrated agencies “理想”整合营销代理商的特征



Note: Marketing Professionals 'work with IMC agencies' interviewed in 2024 (212). Prompted Question. Data in Percentages (%) and Averages.

Selection criteria of IMC agencies 整合营销代理商甄选标准



FINDING 7

# Marketing complexity and competitiveness have raised client expectations

## 市场的复杂性和竞争性侧面提高了客户预期


Agencies need to offer more value-added services, alliances, and collaborations to differentiate themselves and help clients cut through a challenge market.


代理商需要提供更多的增值服务、联盟和合作，如联合品牌合作，以实现差异化，帮助客户在市场中脱颖而出。

### Agency Communication & PR 代理商传播渠道及公关方式

Best campaigns from the last two years 过去两年中最受瞩目的活动


- 1






Co-branding  
Luckin Coffee X Moutai


40 Mentions
  
- 2






Co-branding  
FENDI X HEYTEA


11 Mentions
  
- 3






2022  
Chinese New Year Activities

9 Mentions
  
- 4





Co-branding  
Louis Vuitton X MANNER

8 Mentions

Note: *Marketing Professionals* interviewed in 2024 (164). Spontaneous Question. Data in Mentions and Ranking (#)

FINDING 8

Clients tend to be detractors, not promoters

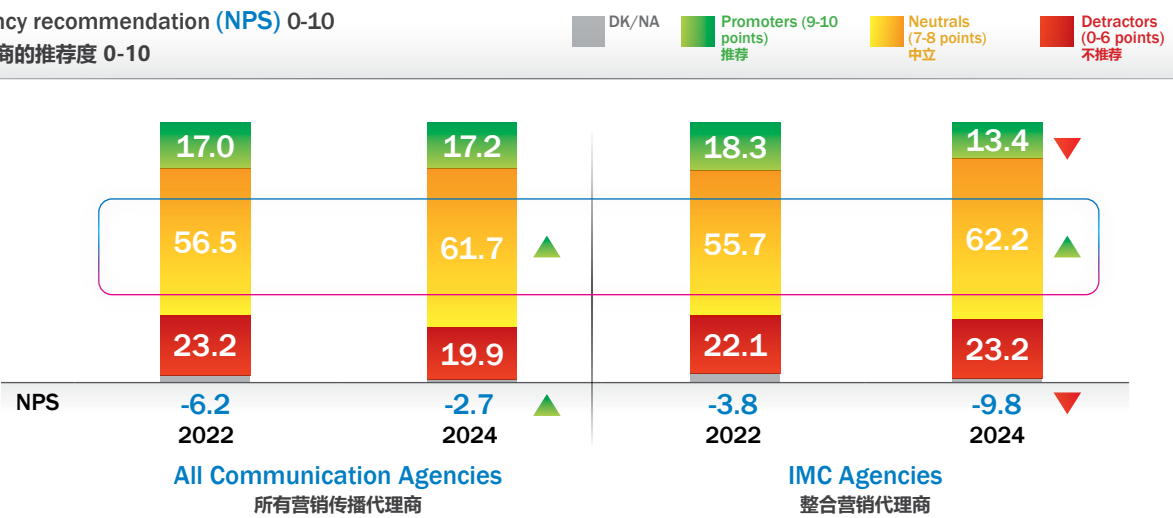
永远有更高期待，难以满足的市场主

Even though NPS (Net Promoter Score) has increased in the last two years, the number of detractors remains higher than promoters, confirming that China clients are hard to satisfy.

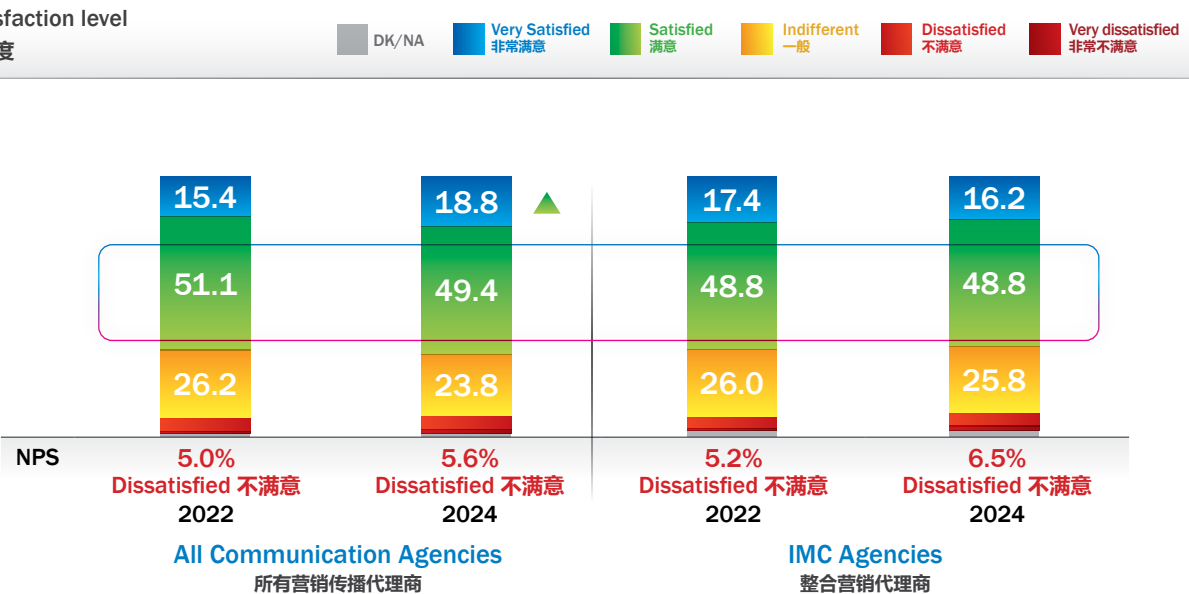
尽管 NPS (净推荐指数) 在过去两年有所上升，但不满者的数量仍然高于推崇者，这证明中国客户很难让人满意。

Client-Agency Relationships 客户与代理商合作关系

Agency recommendation (NPS) 0-10  
代理商的推荐度 0-10



Satisfaction level  
满意度



Note: Accounts analysed in 2020 and 2024 (All communication agencies: 509/627, 'work with IMC agencies': 287/426). Prompted Question. Data in Percentages (%) and NPS.



FINDING 9

Proving performance to justify investment

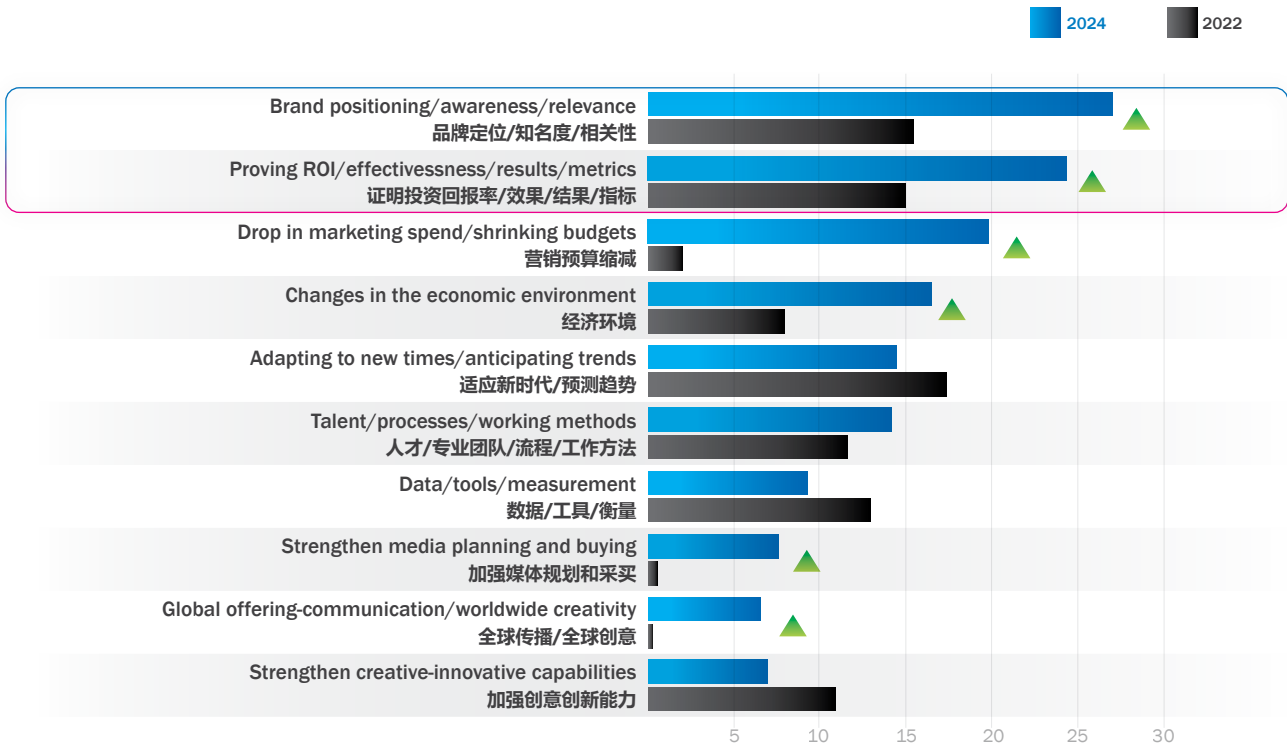
亟需可供衡量的实际表现以证明投资有效性

Brand Positioning / Awareness / Relevance (26.9%), Proving ROI / Effectiveness / Results / Metrics (24.3%), and Shrinking Budgets (19.7%) are the main challenges mentioned by marketers. Agencies who can address these pain points will find favour with China marketers.

品牌定位/知名度/相关性 ( 26.9% )、证明投资回报率/效果/结果/指标 ( 24.3% ) 和预算缩减 ( 19.7% ) 是营销人员提到的主要挑战。能够解决这些痛点的代理公司将获得中国营销人员的青睐。

Challenges for the Future 未来的挑战

Challenges for marketers 市场主面临的挑战



Note: Marketing Professionals interviewed in 2022 (202) and 2024 (305). Spontaneous Question. Data in Percentages (%).

FINDING 10

# Marketers look to creativity to break through clutter

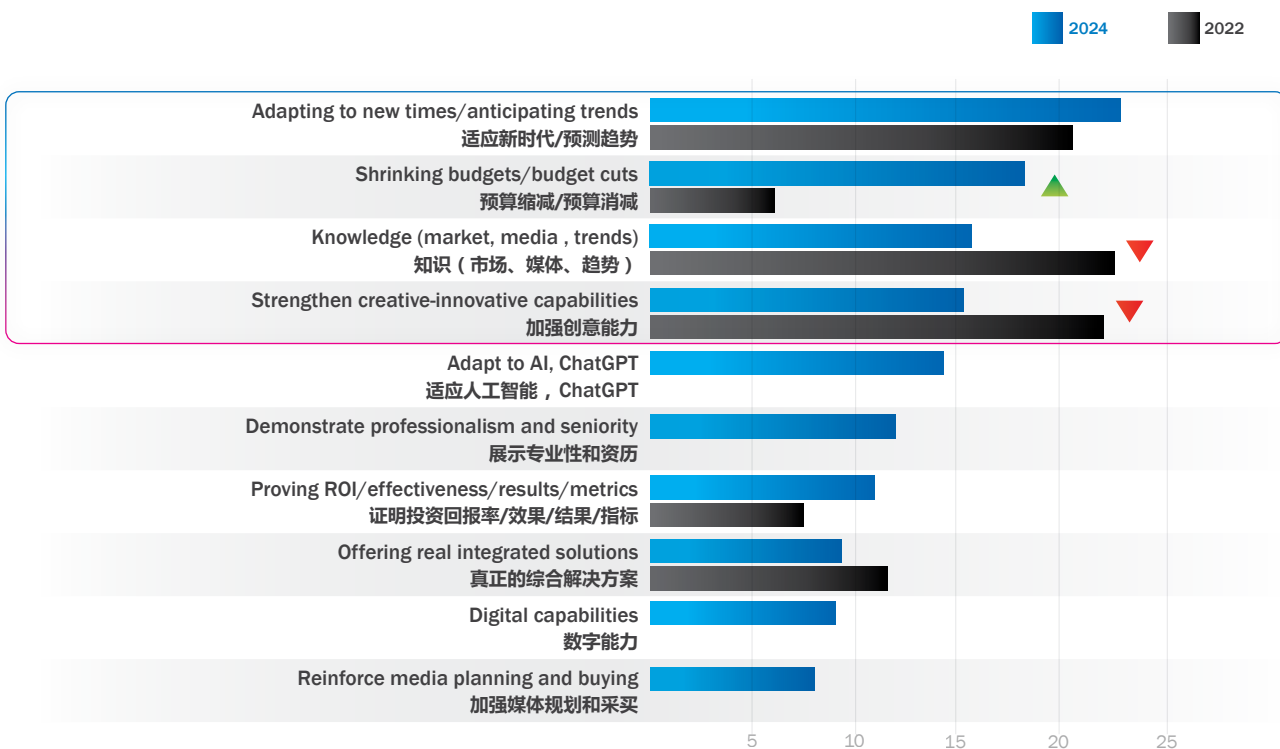
## 以创意来突破杂乱无章的竞争环境

Helping clients stand out in saturated market in a way that strengthens brand positioning, consideration and audience connection, is key to retaining and winning new accounts for agencies.

通过强化品牌定位、品牌考虑度和与受众的联系，帮助市场主及其负责的品牌在饱和的市场中脱颖而出，这是代理商维系现有与赢得新合作关系的关键。

### Challenges for the Future 未来的挑战

Challenges for agencies 代理商面临的挑战



Note: *Marketing Professionals* interviewed in 2022 (202) and 2024 (305). Spontaneous Question. Data in Percentages (%).  
Question has been reformulated in 2024.

# ABOUT R3

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

## 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.

## 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.
- We have co-developed software to measure agency and media performance.
- Each month, we exclusively track over 500 agency new business wins.
- 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 marketing strategies perform in your category and across categories.

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