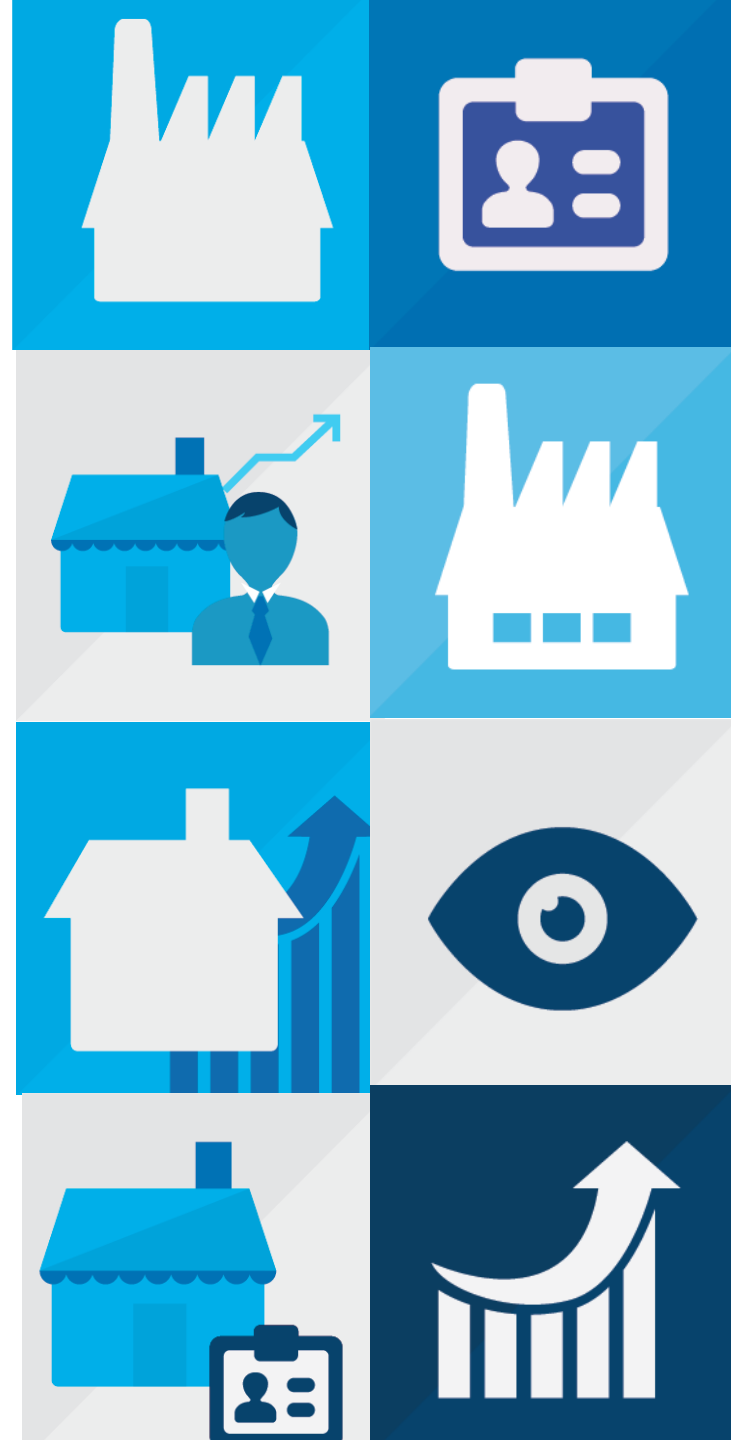

CHINA

agencyScope 2014 中国营销趋势研究

A research study conducted
by Grupo Consultores and R3, since 2006

始于2006年，由Grupo Consultores与胜三共同
执行的调查研究

5th Edition, 2014 第五版, 2014



CLIENT-AGENCY TRENDS



广告主与代理商趋势

- 1 INTRODUCTION, METHODOLOGY, & TECHNICAL DATA
概述，研究方法，数据
- 2 ADVERTISERS AND THEIR RELATIONSHIPS WITH AGENCIES
广告主与代理商的关系
- 3 THE ADVERTISING AGENCIES' OVERVIEW
代理商概况

1

**INTRODUCTION, METHODOLOGY,
& TECHNICAL DATA**

概述，研究方法，数据

Introduction

简介

agencyScope Globally
营销趋势调研全球分布



Introduction

概述

- 2014 report is the fifth edition of the Study in China.
 - Only Senior Decision Makers were Interviewed.
 - Face-to-face and telephone, 40min-1 hour interviews.
 - Fieldwork: August - December 2013.
 - A tool for taking action.
- 2014年报告为中国地区第五版
 - 受访者为高级市场营销决策者
 - 时长40分钟至1小时的面对面深度访问
 - 实地调查：2013年8月 - 2013年12月
 - 用于采取行动的工具

Methodology

研究方法

IMAGE STUDIES

形象调研

RELATIONSHIPS

关系数量

Marketers on Advertising agencies
广告主与传统广告代理商关系

314

Marketers on Marketing Services agencies
广告主与市场营销代理商关系

157

Marketers on Digital agencies
广告主与互动代理商关系

243

Marketers on Media agencies
广告主与媒介代理商关系

230

Technical Data

数据

Marketing budget

营销预算 (%)

	2014	2012	2010
Below 40M 4千万以下	16.1	13.3	23.4
41 - 100M 4千1百万 - 1亿	9.6	14.5	26.6
101 - 200M 1亿 1百万 - 2亿	7.3	10.3	12.8
201 - 500M 2亿1百万 - 5亿	16.5	18.2	14.9
501 - 1B 5亿 1百万 - 10亿	8.0	6.7	5.9
Above 1 B 10亿元以上	12.3	5.5	5.3
Does not spend 没有营销预算	0.4	--	11.2
DK/NA 不知道/不适用	29.9	31.5	23.4
Average (Million RMB)	264.60	199.87	196.38

Base: 261 interviewees in 2014, 215 in 2012 and 188 in 2010

基数：2014年受访者为261位，2012年受访者为215位，2010年受访者为188位

- 45% of budget goes to above-the-line campaigns, 36% to below-the-line and 18.6% to Digital.
- In the UK investment in Digital goes up to 22.5%.

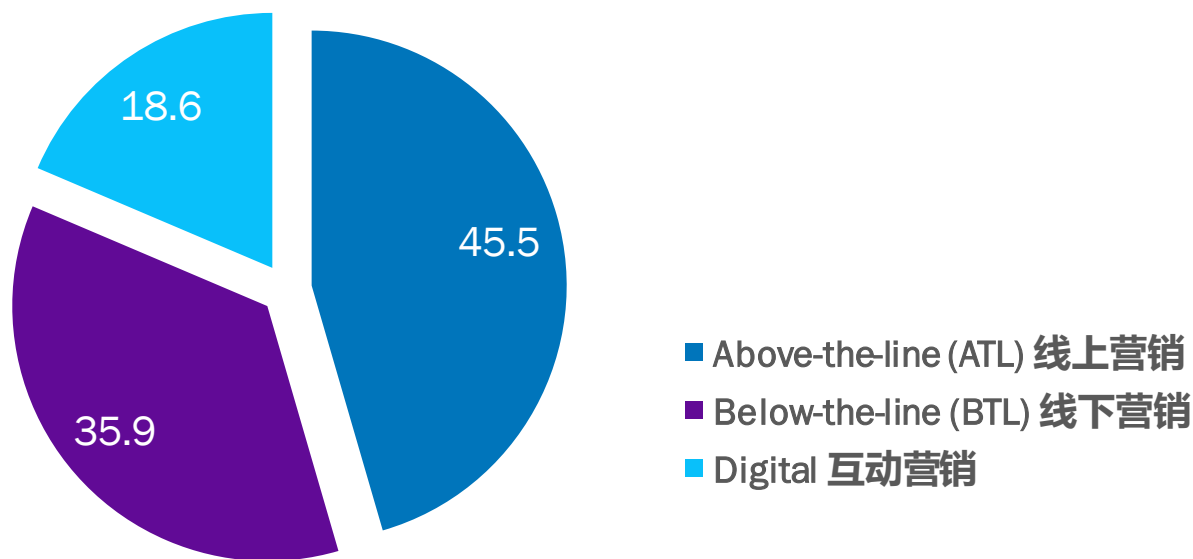
- 分配给线上营销的预算占45%，线下营销的预算占36%，同时，互动营销占18.6%。
- 在英国的调研结果显示，互动营销的预算比例已经上升到22.5%。

Technical Data

数据

Budget split (%)

预算分配 (%)



Base: 261 interviewees in 2014
基数：2014年受访者为261位

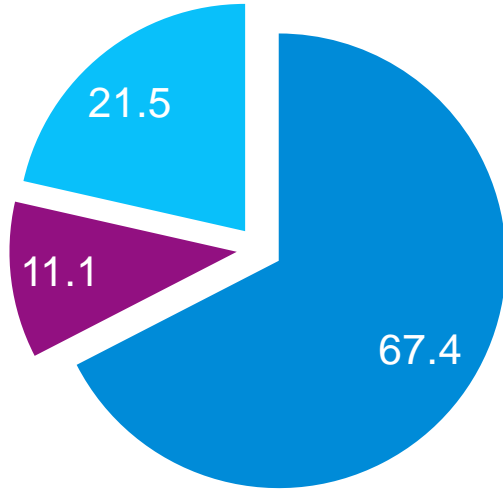
Technical Data

数据

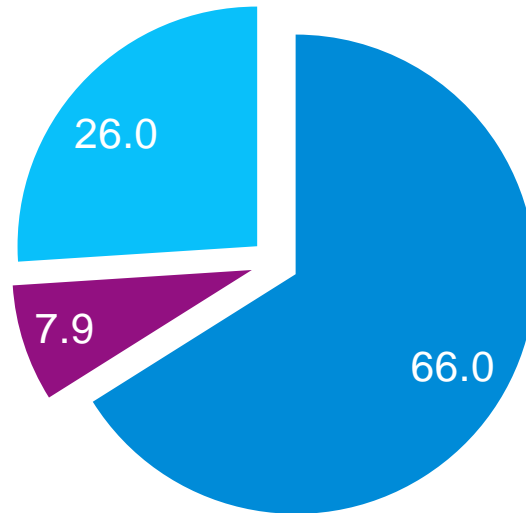
Type of company (%)

公司分类 (%)

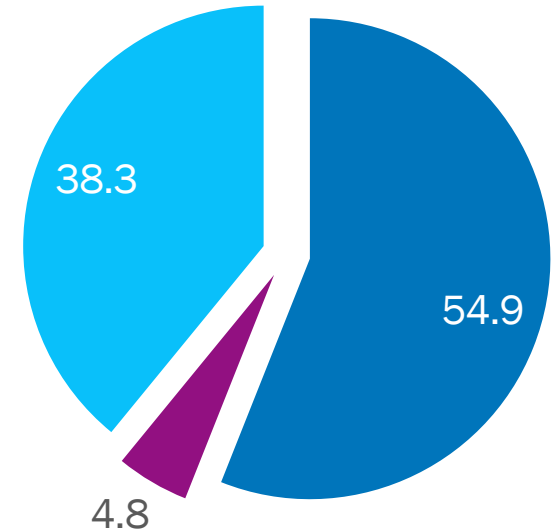
2014



2012



2010



- MULTINATIONAL 跨国企业
- STATE OWNED 国有企业
- LOCALLY OWNED 地方企业

Base: 261 interviewees in 2014, 215 in 2012 and 188 in 2010

基数：2014年受访者为261位，2012年受访者为215位，2010年受访者为188位

Technical Data 数据

Companies interviewed
(59% that agreed to share their name)
受访广告主 (59%)



AGENCY RELATIONSHIP + REMUNERATION + REVIEW CONSULTANTS

2

ADVERTISERS & THEIR RELATIONSHIPS
WITH ADVERTISING AGENCIES
广告主与代理商的关系



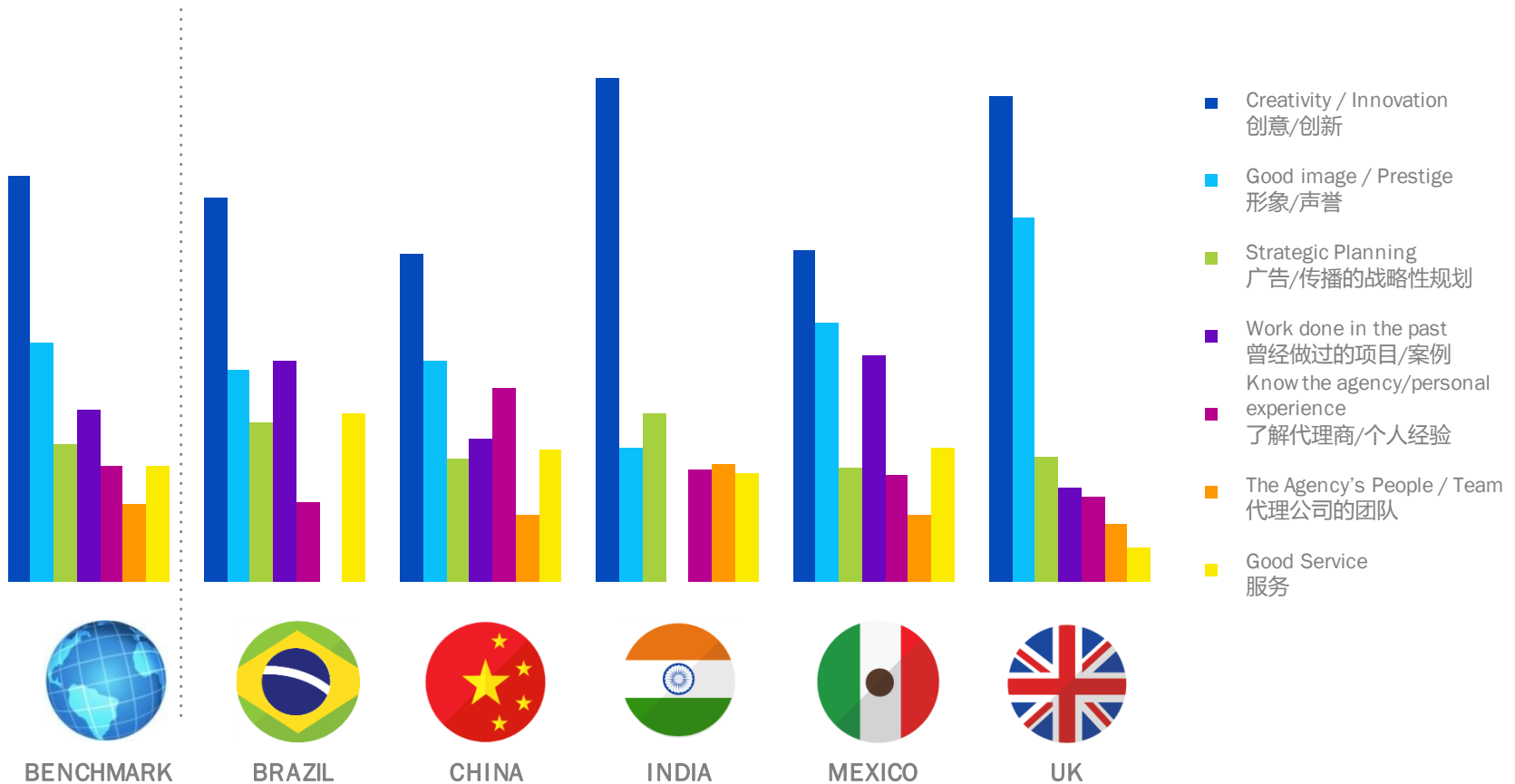
ADVERTISING AGENCY SELECTION 代理商挑选

Agency Selection

代理商挑选

Criteria used to create a short list of advertising agencies

创建候选创意代理商名单的标准

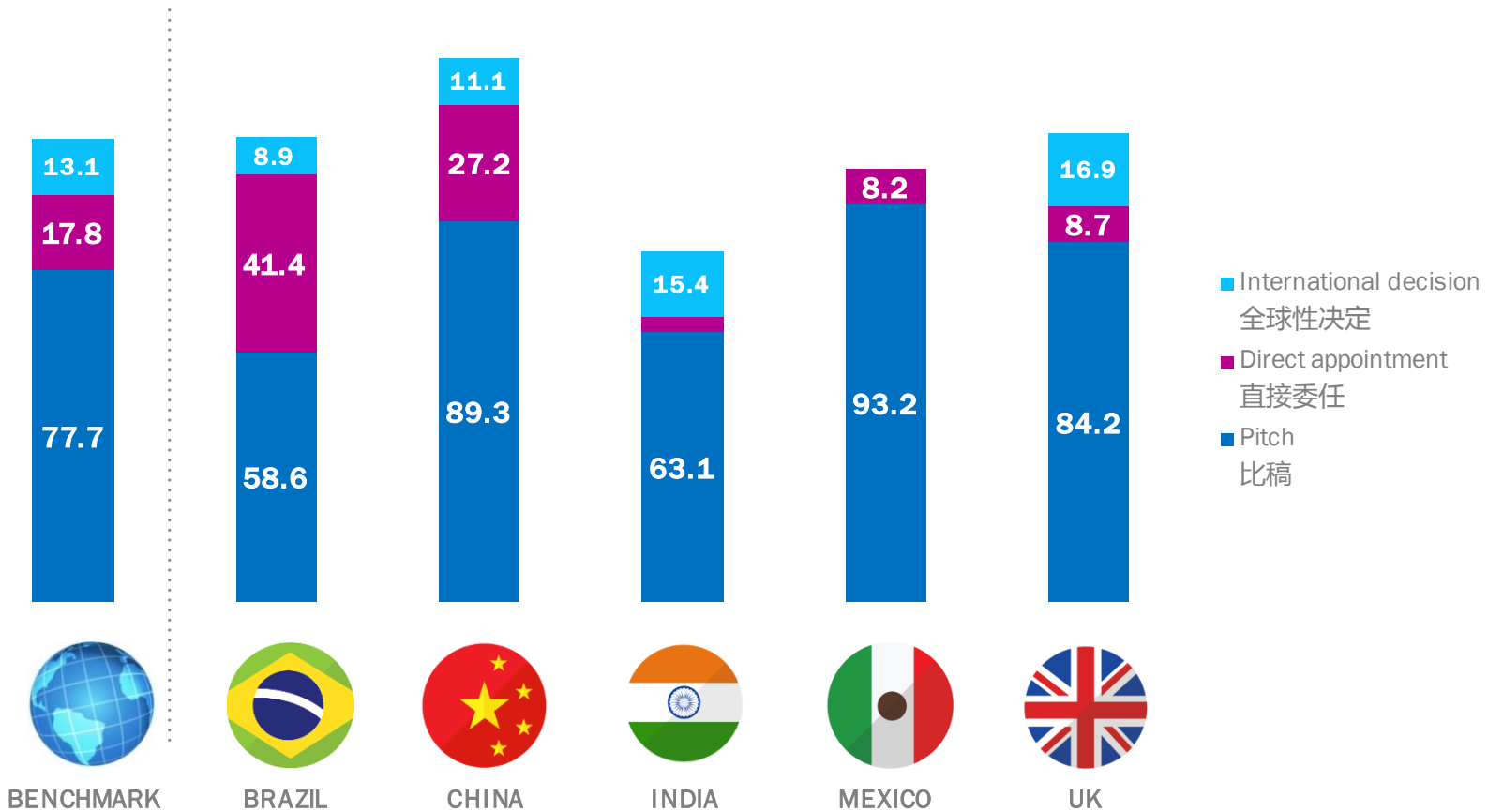


Agency Selection

代理商挑选

Selection methods

挑选方法





ADVERTISING AGENCY- ADVERTISER RELATIONSHIPS

广告主与代理商的关系

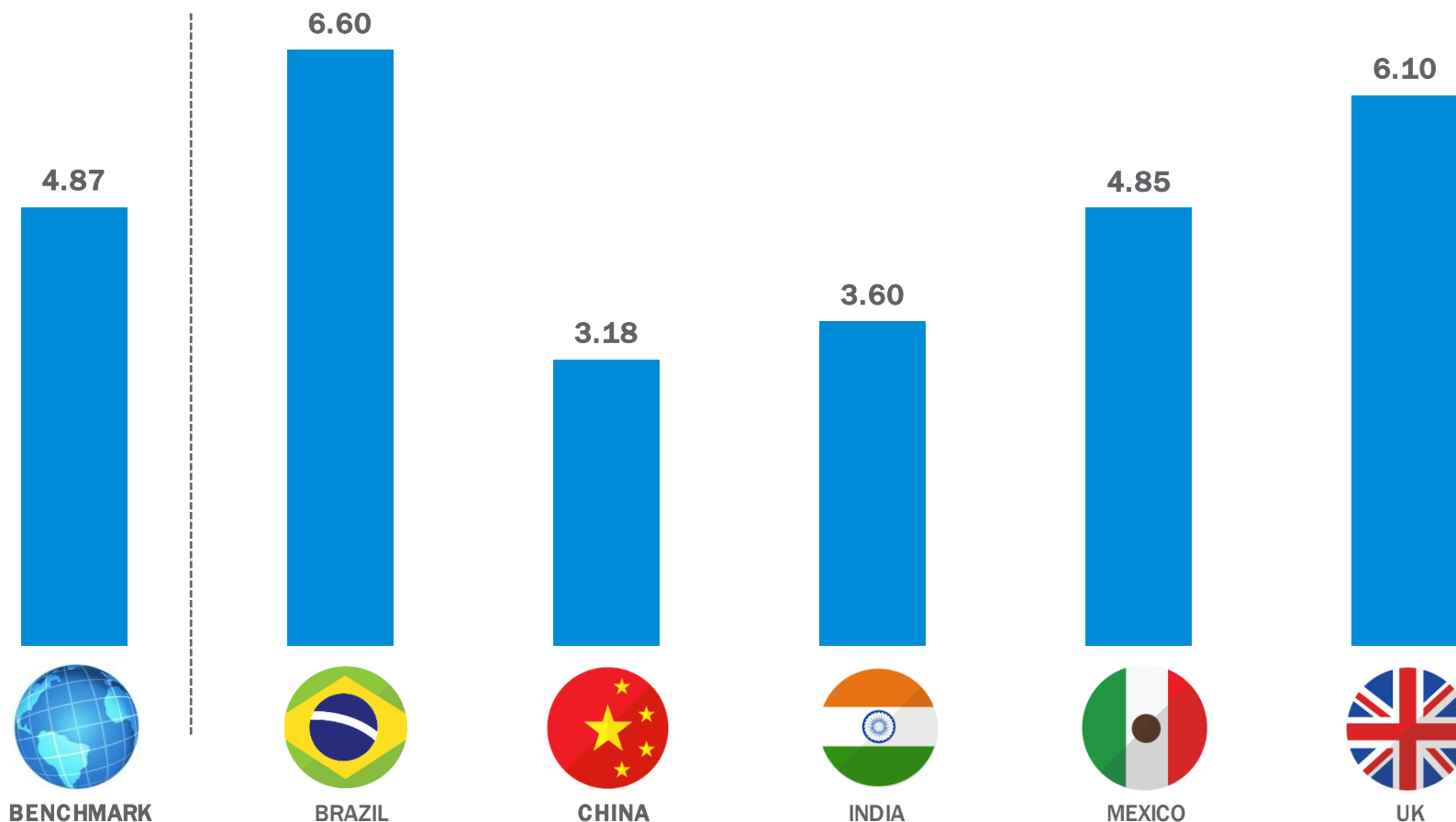
- China has shorter relationships than any other market. Clients in the UK and Brazil work with their agencies for more than 6 years.

- 中国的合作关系持续时间比其他各个国家都要短。英国和巴西的客户都与他们的代理商保持着超过6年的关系。

Agency-Advertiser Relationships

代理商-广告主关系

Duration of the relationship (average)
合作关系的持续时间 (平均)



Agency-Advertiser Relationships

代理商- 广告主关系

Number of agencies by advertiser
广告主的代理商数量 (%)

TYPE OF AGENCIES 形象调研	# AGENCIES 代理商数量
Average Number of Advertising agencies 传统广告代理商平均数量	2.22
Average number of Marketing Services agencies 营销服务代理商平均数量	2.31
Average number of Digital agencies 互动代理商平均数量	2.48
Average number of Media agencies 媒介代理商平均数量	1.20
TOTAL AVERAGE OF AGENCIES 总体代理商平均数量	8.21



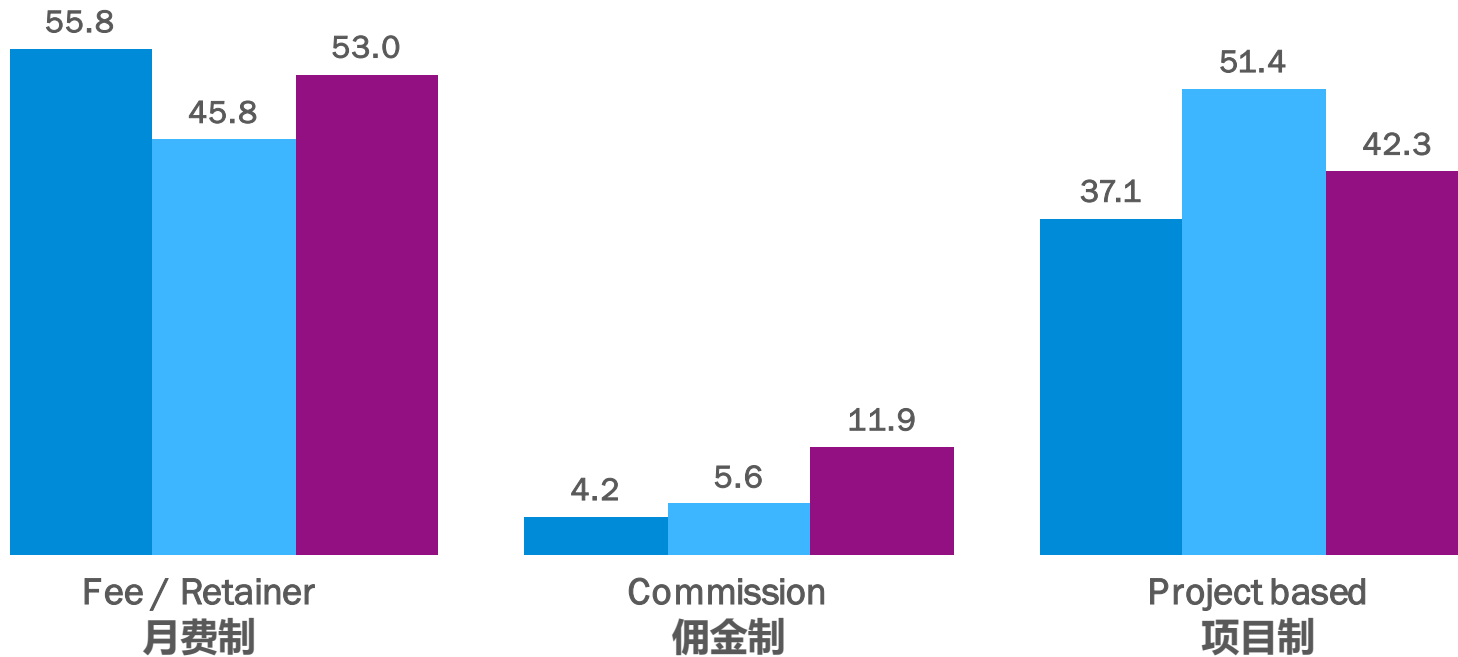
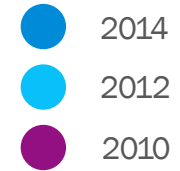
AGENCY COMPENSATION 代理商付费机制

Agency Compensation 代理商付费机制

Compensation methods (%)
付费方式 (%)

2014 Mix (fee+commission): 0.3%
2014年混合制(月费+佣金): 0.3%

2012 Mix (fee+commission): 0.9%
2012年混合制(月费+佣金): 0.9%



Base: 261 interviewees in 2014, 215 in 2012 and 188 in 2010

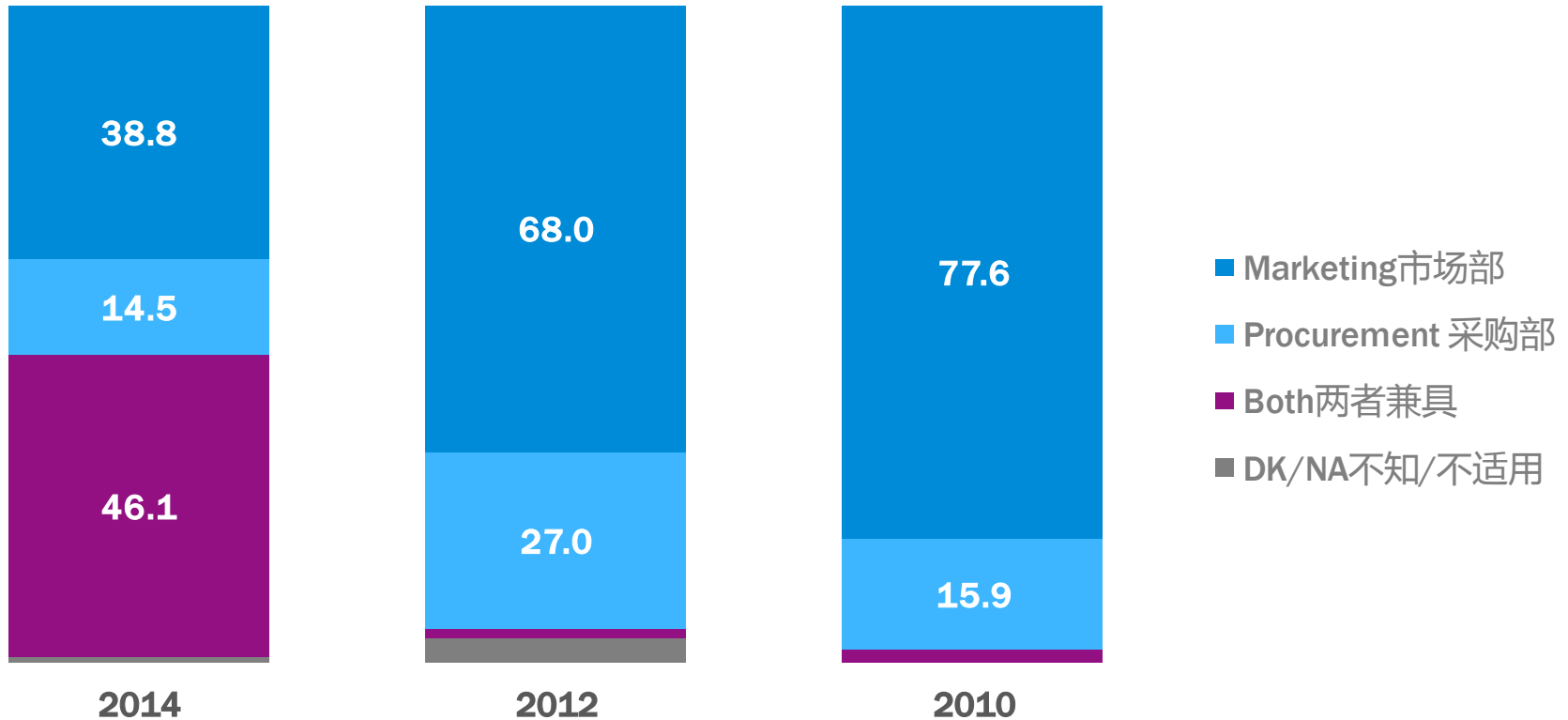
基数：2014年受访者为261位，2012年受访者为215位，2010年受访者为188位

Agency Compensation 代理商付费机制

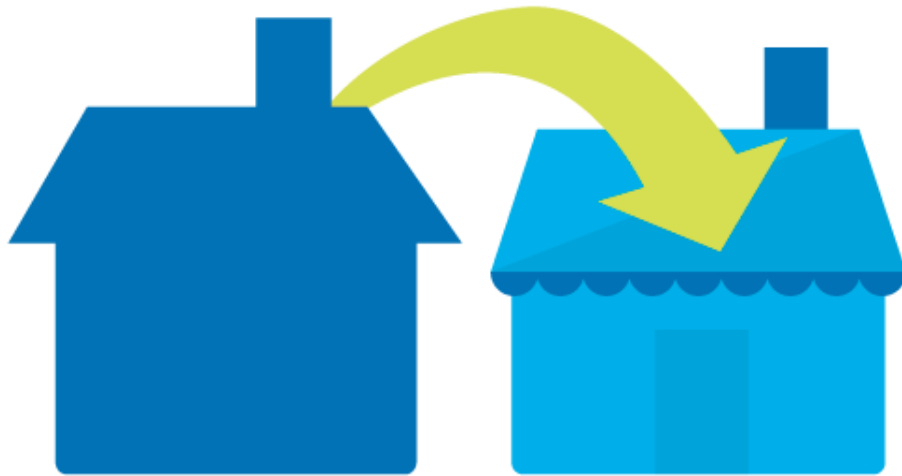
Who leads compensation process (%)
谁来主导付费过程 (%)

- Nowadays in only **39%** of cases Marketing leads the negotiation process. Figures have changed dramatically since 2010.
- In **46%** of cases Marketing and Procurement lead the process jointly.

- **39%**的受访者表示，市场部主导付费和谈判过程。此项数据与2010年相比变化非常显著。
- **46%**的受访者表示市场部和采购部共同合作来完成付费过程。



Base: 152 interviews declare 'procurement involved' in 2014, 135 in 2012 and 107 in 2010
基数：2014年选择“采购部分参与”的受访者**为152位**，2012年为**135位**，2010年为**107位**



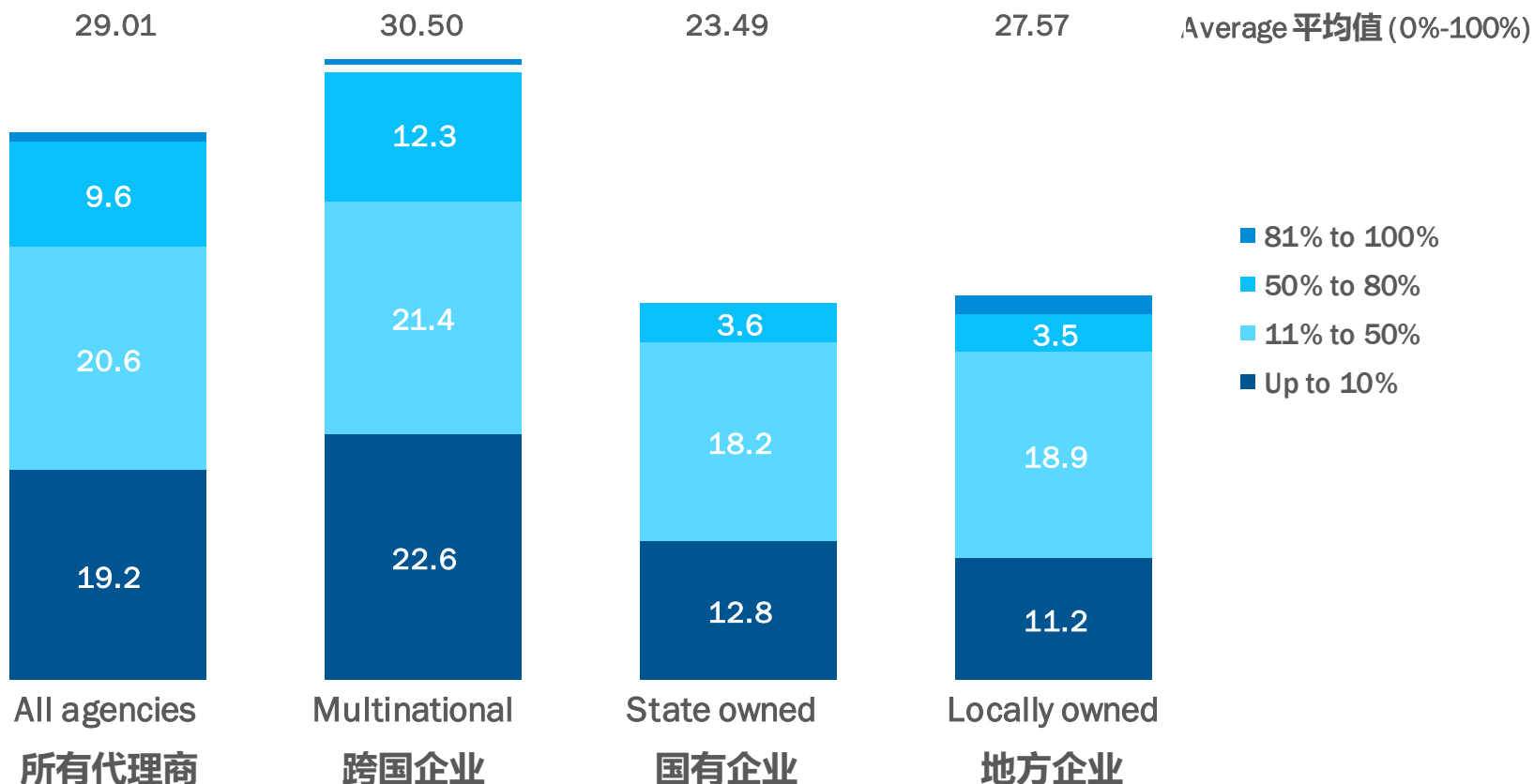
CHANGING AGENCIES 更换代理商

- Clients in average in China believe agencies contribute to their business growth in 29%. Multinational clients are the ones that believe agencies help them more to grow their business (30%).

- 在中国广告主认为代理商能为他们的业务增长做出贡献的平均比例是29%。跨国企业的客户认为代理商对其业务增长的贡献比例是30%。

Changing Agencies 更换代理商

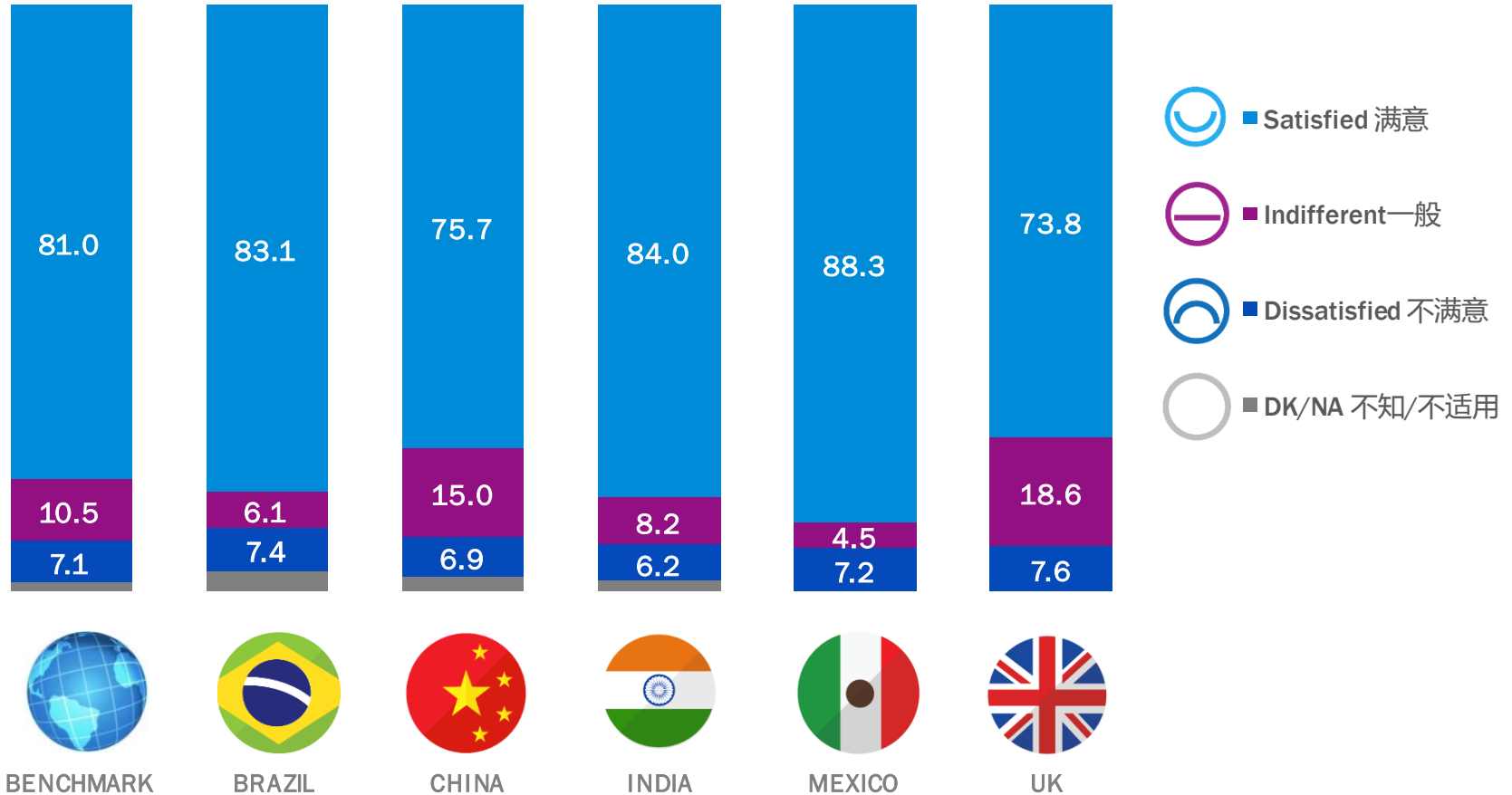
Contribution to business growth (%)
业务增长 (%)



Base: 314 relationships analyzed in 2014
基数：2014年分析的314个代理商合作关系

Changing Agencies 更换代理商

Satisfaction with current agency (%)
对当前广告代理商的满意程度 (%)



3

The Advertising Agencies Overview 广告代理商总体分析

HIGH PROFILE CAMPAIGNS

知名度高的广告活动



High Profile Campaigns 知名度高的广告活动

1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
	BRAZIL	CHINA	INDIA	MEXICO	UK

Most Respected Companies 最受尊重的广告活动

1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
	BRAZIL	CHINA	INDIA	MEXICO	UK



THANK YOU
谢谢

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