

China and SA share a love for specialist agencies

When it comes to working with specialist agencies, China has a similar profile when compared to other markets such as Mexico, the UK, and South Africa, where specialisation is rising year over year.



Source: © Kantar [Kantar](#) When it comes to working with specialist agencies, China has a similar profile to Mexico, the UK, and South Africa, where specialisation is rising year over year

“One of the main explanations for this trend is a complex and changeable environment full of new digital and data options which necessitate working with specialists,” says César Vacchiano, president and CEO at Scopen.

This is according to Scopen’s just completed *Agency Scope Study* in China, in collaboration with R3, a global marketing consultancy in China.

Agency Scope China 2021/22 is the ninth edition of the study in the country, which is also conducted in 11 other markets, enabling it to include global benchmarks in key criteria.

In this edition, Scopen interviewed 396 professionals from 208 leading companies that operate in the Chinese market with 670 client-agency relationships analysed. The fieldwork took place between August and December 2021.

The study provides a unique tool for agencies to improve and supply new services as it covers the main findings and trends in the communication and marketing sector in China, more specifically, the perception and image of a company in comparison to all other agencies and communication partners that Chinese marketing professionals work with.



Marketing budget distribution

Marketing professionals interviewed distribute their marketing budget in China as follows:

- 53.2% - more than half - are invested in brand-building campaigns.
- 48.8% are invested in transaction-driven activities (performance).

Figures are similar when split by size of the company (multinational and locally based).

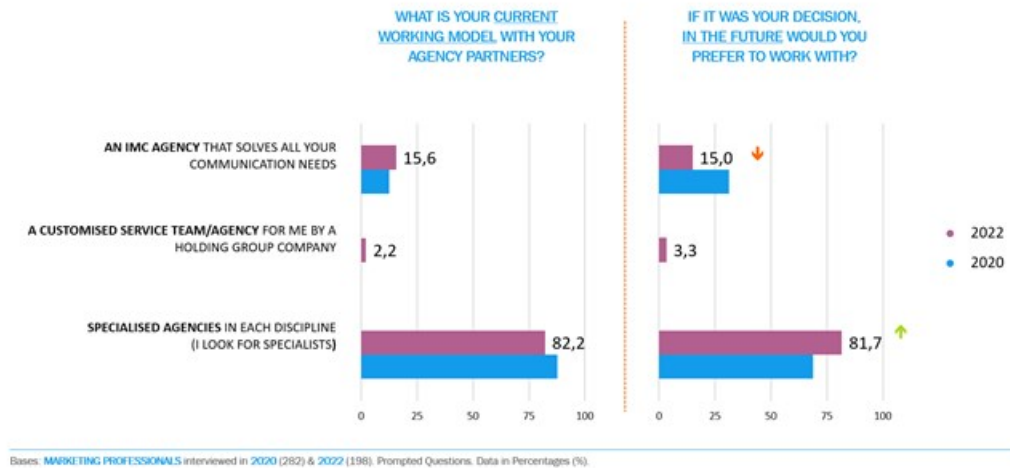
Asked what type of agency they are currently working with to meet their communication needs:

- 82.2% of the respondents currently work with specialised agencies in each discipline.
- 15.6% work with an integrated agency.
- 2.2% work with a customised service team/agency by a holding group company.

(Globally 49% of marketing professionals prefer to work with specialists and 51% with an integrated agency.) For the near future, the figures show a similar trend.

STRUCTURE OF COMPANIES (MARKETERS)

INTEGRATION vs. SPECIALISATION



Supplied: R3, Scopen

On average, an advertiser in China works with 25.6 different partners to solve all its marketing-communication needs:

- Digital platforms (9.1)
- Field marketing agencies (3.9)
- Digital & social agencies (3.8)
- IMC agencies (3.5)
- Media agencies (1.8)
- PR agencies (1.8)
- Divisions of consultancies (1.7).

STRUCTURE OF COMPANIES (MARKETERS)

25.6 DIFFERENT PARTNERS TO SOLVE MARKETERS' NEEDS (IN MARKETING-COMMUNICATION-ADVERTISING-MEDIA)

HOW MANY PARTNERS
IS YOUR COMPANY CURRENTLY WORKING WITH?



Bases: MARKETING PROFESSIONALS interviewed in 2022 (377). Spontaneous Question. Data in average of number of partners.

Supplied: R3, Scopen

A commitment to innovation and digital transformation

The study also found that Covid-19 accelerated the process of innovation and digital transformation and commitment in China. "Being closer to digital platforms will help agencies to be perceived as companies better prepared to work with brands," says Vacchiano.

"Competition is high, and all strategies that help marketers to reinforce the position of their brand and connect with their audiences, will help enormously when it comes to retaining clients, and winning new accounts," he says.

Commitment to leading agencies

One of their current creative or media agencies leads all their communication needs says 38.5% of marketing professionals - an increase compared to the previous edition of the study (20.7% in 2020).

Despite this growth, China is placed below the global benchmark (55.4%). In other countries, such as the UK and South Africa, commitment to leading agencies is higher.

China is the market in which advertisers tend to work with most partners. The more partners you have, the more complex the coordination and leadership. In China, almost four out of 10 marketers (a figure that has doubled in the last two years) identify one of their agencies (creative or media) as the leader of their communication-advertising-marketing.

The ideal creative agency

For marketers, strategic planning, integrated services offering, and creativity-innovation are the three most mentioned attributes to define the ideal creative agency, followed by an expert professional team and the agency's previous experience and expertise.

In comparison to the previous edition (2020), mentions for good professional team, agency's previous experience and expertise, research, data, tools', branded content expertise, digital capabilities and, good value for money / reasonable fee have increased.

Media agencies stand out in media planning, negotiation capabilities / good prices, research, data, tools', and strategic planning. When compared to 2020, media planning and good value for money / reasonable fees have increased.

More than ever, strategic planning and data are key to enabling marketing professionals to differentiate their

brand/company from competitors to reach more evolved, informed, and demanding consumers.

Agencies must meet this creative challenge by offering more and better ideas that communicate with impact.

Agency Scope

The primary value of *Agency Scope* is to provide subscribing agencies, and other communication partners, with first-hand information regarding the needs of their existing and prospective clients.

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