R3 : SCOPEN

CHINA AGENCY SCOPE
中国营销趋势研究

2026

11th edition, 2026 第十一版，2026年

INTRODUCTION

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

Its primary value is to provide subscribing agencies with first-hand intelligence on client needs, serving as a unique strategic tool to enhance and innovate their service offerings.
The report covers **key trends in the communications and marketing sector**—specifically, how Chinese marketers perceive their agencies compared to competitors.

The report data is derived from **marketing and communication decision-makers** of leading brands in China (covering integrated, digital, offline, and media), as well as **senior decision-makers in indirect procurement.** Each interviewee must be involved in agency selection or have direct working experience with agencies. **Annually**, we gather insights and feedback from more than **2,500 marketers** worldwide.

AGENCY SCOPE China 2025/26 marks the **11th edition** of the study in this market. The research is conducted simultaneously in 11 other markets (Spain, Portugal, United Kingdom, Argentina, Brazil, Chile, Colombia, Mexico, South Africa, India, and Singapore), enabling us to provide global benchmarks across key performance indicators. For this edition, we interviewed professionals from **212 different companies** in China, analyzing a total of **959 client-agency relationships.**

《营销趋势研究》是一项**每两年一度**的趋势研究，深度聚焦市场主与代理商合作关系的演变，全面评估代理商的最新市场看法及定位。

作为一项独特的战略工具，《营销趋势研究》旨在助力代理商优化现有业务并创新服务体系。报告涵盖了与**市场营销相关的核心发现及趋势**，展现了**市场主对营销需求的变化**，以及**对代理商能力要求与产出需求的升级。**

报告数据源于中国领先品牌的**营销传播决策者**（涵盖整合营销、数字营销、线下营销及媒介等领域）以及**间接采购的资深决策**人员。每位受访者均须参与代理商选择或与代理商有直接合作接触。**每年**，我们在全球范围内采集超过 **2,500 位**市场主的意见与反馈。

《2025/26 中国营销趋势研究》是在中国发表的**第十一版。**此类研究在全球其他 11 个市场（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）同步开展。因此，在关键指标上，我们能够提供国际市场基准的对比参考。在本次中国区调研中，我们共采集了来自 **212 家**中国及跨国企业的品牌主反馈，并深度分析了 **959 个**市场主-代理商的合作关系。

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Principal, R3

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METHODOLOGY

UNIVERSE

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

Their companies must currently work with at least one communication or media agency in China. Participating professionals must have been involved in the decision-making process for selecting agencies and approving their work.

They must also have interacted with communication or media agencies on an ongoing basis. In addition to R3-SCOPEN's own databases, leading agencies in China provided a list of their most important clients, who were collectively approached for interviews.

分析数据来源

在中国负责市场营销、传播、数字和媒介的管理人员。

受访人员所在公司现阶段必须至少与一家在中国的营销传播或媒介代理商保持合作。受访者必须直接参与代理商的挑选及核定工作 。

受访者必须持续性地处理，与营销传播或媒介代理商相关的选择与评估。除了 R3-SCOPEN 自有数据库外，国内领先代理商也提供了其主要客户名单，以确保更多资深市场主参与本次访谈。

SAMPLE

288 individuals working in 212 client companies. These individuals work in the marketing departments of client companies

样 本

访谈了来自 212 家公司的 288 位受访客户。受访者均在品牌方营销相关部门工作 。

TECHNICAL DATA 研究数据

A total of 288 Professionals Interviewed

共访谈了288位市场主

	2024	2026
MARKETING PROFESSIONALS INTERVIEWED 受访客户	323	288
WORKING WITH IMC AGENCIES 受访客户参与整合营销代理商评估人数	212	272
WORKING WITH COMMERCE AGENCIES 商业营销公司	--	28
WORKING WITH MEDIA AGENCIES 受访客户参与媒介代理商评估人数	184	245
CLIENT-AGENCIES RELATIONSHIPS ANALYSED 客户与代理商关系分析	837	959
IMC AGENCIES 受访客户与整合营销代理商关系	426	629
COMMERCE AGENCIES 商业营销公司	--	26
MEDIA AGENCIES 受访客户与媒介代理商关系	210	330

QUESTIONNAIRE

A semi-structured questionnaire with open-ended questions was used, allowing interviewees to provide in-depth opinions. All quotes referring to each subscribing agency are included in specific, Individual Confidential Reports prepared for them.

问卷

采用半结构式问卷与开放式问题，引导受访者提供更深入的意见。所有涉及到订阅代理商的引述内容，均包含在为其定制的专项机密报告中 。

TYPE OF INTERVIEW

Face-to-face (F2F) video call interviews and phone interviews (30%) conducted through a CAWI system (Computer-Aided Web Interview). The average duration of the interviews was 60 minutes.

访谈形式

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（占 70%）和电话访谈（占 30%）。平均访谈时长为 60 分钟 。

DATES OF FIELDWORK

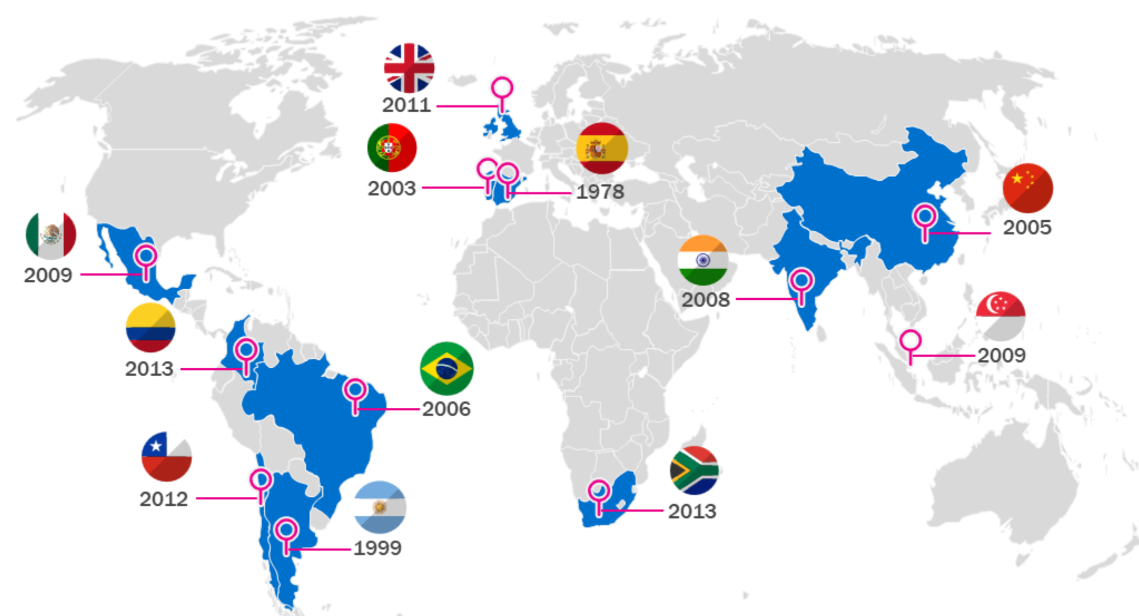
From September to December 2025

调研期间

2025 年 9 月至 12 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	LATEST EDITION
ARGENTINA	2025/26
BRAZIL	2024/25
CHILE	2025/26
COLOMBIA	2022/23
MEXICO	2025/26
SPAIN	2024/25
PORTUGAL	2025/26
UK	2021/22
CHINA	2025/26
INDIA	2021/22
SINGAPORE	2009/10
SOUTH AFRICA	2025/26

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. 45.9% operate at the Director/ Manger level.

受访者来自不同职能部门和职位，以确保研究样本的平衡、中立与完整。其中，45.9% 的受访者为市场总监 / 市场经理。

SAMPLE PROFILE
访谈概况

Interviewee Particulars 受访者信息

CITY 城市	2024	2026
SHANGHAI 上海	57.1	67.4
BEIJING 北京	15.3	17.4
GUANGDONG 广东	6.3	6.9
OTHER CITIES IN CHINA 其它城市	21.1	8.0
OTHER COUNTRIES 其他国家	–	0.3

TENURE (AVERAGE YEARS) 任期（平均年数)	2024	2026
AT YOUR CURRENT COMPANY 现有公司任职年限	6.7	7.9
AT YOUR CURRENT ROLE 现有职位任职年限	5.7	5.8

ROLE 职责	2024	2026
DIRECTOR & ABOVE 总监级别或以上	44.2	36.8
MIDDLE MANAGEMENT 非总监级别	55.8	60.4

JOB TITLE 职称	2024	2026
PRESIDENT, CEO, GM 总裁，首席执行官，总经理	4.9	5.9
MARKETING DIRECTOR / MANAGER 市场总监 / 市场经理	14.9	45.9
BRAND DIRECTOR / BRAND MANAGER 品牌总监 / 品牌经理	15.3	11.5
COMMUNICATIONS DIRECTOR 传播总监	6.8	3.5
MEDIA DIRECTOR 媒介总监	5.8	16.3
DIGITAL DIRECTOR 数字营销总监 / DIGITAL MANAGER 数字营销经理	29.2	3.7
OTHER* 其它 *	23.1	13.2

TYPE OF COMPANY 公司类型	2024	2026
CHINESE MULTINATIONAL BUSINESS / BRAND 本土跨国企业	7.5	10.4
FOREIGN MULTINATIONAL 外资国际企业	74.4	74.3
LOCAL BUSINESS / BRAND 国内本土企业	17.9	14.2
STATE OWNED 国营单位	0.3	1.0

OTHER 其它 DIRECTOR / HEAD OF PR (0.7), DIRECTOR / HEAD OF CONTENTS (0.3), NEW BUSINESS DIRECTOR / SALES DIRECTOR (0.3), OPERATIONS DIRECTOR (0.3), STRATEGIC PLANNING DIRECTOR (0.3), PROCUREMENT (8.3), OTHER JOB TITLE (3)

BASES: MARKETING PROFESSIONALS INTERVIEWED IN 2024 (323) AND 2026 (288). PROMPTED AND SPONTANEOUS QUESTIONS.

DATA IN PERCENTAGES (%) AND AVERAGES (YEARS).

RESPONDENTS BY INDUSTRY
参与访谈的市场主行业分布

Influenced by consumer demand and communication frequency, FMCG remains the leading sector requiring extensive external partnerships, accounting for 53.5% of all respondents. Meanwhile, Automotive brands, affected by industry trends and the insourcing of certain scopes, saw a slight decline to 10.1%.

受营销沟通频率与需求影响，快消品 (FMCG) 品牌仍是需要大量外部合作伙伴的行业，占受访总量的 53.5% 。由于汽车行业整体态势及更多工作范畴转向内部，汽车类受访者占比略微下降至 10.1%

SAMPLE PROFILE
访谈概况

Interviewee Particulars 受访者信息

SECTOR 行业种类	2024	2026
FMCG	45.1	53.5
FAST MOVING CONSUMER GOODS 快消品	13.6	8.7
BEVERAGES 饮料	12.3	19.1
BEAUTY, COSMETICS AND PERSONAL CARE 美容、化妆品、个人护理	12.3	14.6
HOUSEHOLD PRODUCTS 家居用品	0.6	0.7
HEALTHCARE / PHARMACEUTICAL 保健/药品	6.2	5.9
DURABLE GOODS	28.2	22.9
HOUSEHOLD FURNISHINGS AND APPLIANCES 家用家具、电器	4.5	5.2
AUTOMOTIVE 汽车	11.4	10.1
JEWELLERY & WATCHES 珠宝/手表	5.5	4.5
RETAIL / APPAREL 零售/服装	3.6	7.6
SPORTING GOODS 体育用品	1.6	–
OFFICE FURNITURE & SUPPLY 办公设备、办公家具及办公用品	1.6	–

SECTOR 行业种类	2024	2026
SERVICES	25.6	21.9
FINANCE & INSURANCE 金融/保险	1.6	1.7
TELECOMS 电信	2.9	9.4
PUBLIC AND PRIVATE SERVICES 公共和私人服务	4.5	–
TRAVEL / TOURISM 旅游	2.3	3.5
RESTAURANTS 餐厅	0.6	2.1
ENERGY 能源 / FUEL AND OILS 燃油及润滑油	1.9	0.7
BUILDING MATERIALS & FARMING 建筑材料、机械、农用设备	6.2	–
CULTURE, EDUCATION & MEDIA 文化、学校、娱乐及媒体	4.2	4.5
PROPERTY / REAL STATE 房地产	1.3	–
OTHER	1.1	1.7

BASES: MARKETING PROFESSIONALS INTERVIEWED IN 2024 (323) AND 2026 (288). PROMPTED QUESTION.

DATA IN PERCENTAGES (%)

PARTICIPATING COMPANIES
受访公司

A total of **288 professionals from 212 companies were interviewed.**
71% of these respondents agreed to have their brand logos displayed as participants.

本次调研共访谈了来自 **212 家公司的 288 位专业人士。**71% 的市场主同意公开展现其品牌 Logo。

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

The R3-SCOPEN 2026 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 the evolving landscape, alongside best practice recommendations to help marketers and their agencies leverage these trends effectively.

R3-SCOPEN 2026 营销趋势研究对中国传播行业进行了深入观察，深度探索了客户与代理商合作伙伴关系、代理商甄选标准以及费用管理等方面的趋势。在接下来的章节中，我们将重点介绍 **10 项核心发现**，旨在概述市场格局的演变，并提供最佳实践建议，协助营销人员及其代理商更有效地利用这些趋势 。

1

MARKETING BUDGETS PRIORITIZE ON SOCIAL MEDIA CAMPAIGNS AND CONTENT / KOL MARKETING
Marketing investment is primarily allocated to Media & Social, followed by Branding & Creative, while Customer Operation & Tech remains a relatively small share of overall budgets.

营销预算优先集中于社交媒体与内容/达人营销
投入主要集中在媒介与社交，品牌与创意紧随其后，而客户运营与技术占比仍相对较小。

2

MULTI-PARTNER ECOSYSTEMS ARE THE DOMINANT OPERATING MODEL
Marketers in China work with an average of 12 partners, with IMC, KOL-buy, and Commerce agencies forming the core of increasingly complex collaboration ecosystems. Media agencies have shown a stable number of mentions in recent years.

多伙伴生态成为主流运作模式
中国市场主平均与 12 家合作伙伴协作，其中整合营销代理商、KOL 投放代理商及电商代理商构成日益复杂合作生态的核心 。媒介代理商的提及数量近年来保持相对稳定 。

3

PROJECT-BASED RELATIONSHIPS DOMINATE CLIENT-AGENCY COLLABORATION
Client-Agency relationships remain stable in duration, but are increasingly managed on a project basis, with remuneration largely standardized around project fees.

主导代理商模式持续弱化
仅有 19.1% 的市场主与主导代理商合作，表明市场正明显转向去中心化的多伙伴协作模式 。这一比例不仅低于全球平均水平，也低于英国等成熟市场 。

4

PROJECT-BASED RELATIONSHIPS DOMINATE CLIENT–AGENCY COLLABORATION
Client–Agency relationships remain stable in duration, but are increasingly managed on a project basis, with remuneration largely standardized around project fees.

项目制合作主导客户—代理商关系
客户与代理商的合作时长整体保持稳定，但合作方式正越来越多地以项目制进行管理； 与此同时，报酬结构也基本围绕项目费用实现标准化 。

5 AGENCY SELECTION INCREASINGLY RELIES ON EXTERNAL VALIDATION
Long lists are mainly built using rankings, awards, credentials, and peer recommendations, while direct contact with agencies or owned channels plays a limited role.

代理商甄选越来越依赖外部验证
在建立长名单时，市场主主要依赖排名与奖项、资质案例以及同行推荐等外部信息来源，而与代理商的直接接触或其自有渠道所发挥的作用相对有限。

6 CREATIVITY AND STRATEGIC THINKING DEFINE THE 'IDEAL' AGENCY
The ideal agency profile is led by Creativity and Strategic Planning, followed by Market and Client Knowledge and a strong professional team.

创意与战略思维定义“理想”营销代理商
理想的营销代理商以创意能力和战略规划能力为核心，其次是对市场与客户的深入理解以及优秀的专业团。

7 LACK OF STRATEGIC INTEGRATION AND MEASUREMENT DIFFICULTIES HINDER THE CROSS-PLATFORM COORDINATION The lack of unified strategic integration and a clear measurement mechanism has become the primary obstacle to enhancing cross-platform marketing effectiveness. It is imperative to break down platform barriers to address the management challenges posed by fragmented touchpoints.

策略整合与效果衡量困难成为跨平台运营的最大瓶颈
跨平台运营的复杂性已超越执行层面，缺乏统一的战略整合与清晰的效果衡量体系成为限制发展的核心障碍。需要打破平台壁垒，以应对碎片化触点带来的管理挑战。

8 BUDGET PRESSURE AND ROI ACCOUNTABILITY SHAPE MARKETERS' PRIORITIES
Shrinking budgets and the need to prove effectiveness are the main challenges for marketers, reinforcing a results-driven and performance-focused environment

预算压力与 ROI 问责正在重塑营销优先级
预算收紧以及对效果与投资回报率 (ROI) 的证明需求，成为营销人员面临的核心挑战，进一步强化了以结果为导向、以绩效为核心的市场环境 。

9 AGENCIES ARE EXPECTED TO ACQUIRE BUSINESS-ORIENTED AND CONTENT INNOVATION CAPABILITIES FOR GROWTH Beyond the key planning capabilities, business-oriented strategic thinking and content innovation have become essential extended capabilities for agencies to support marketers in seeking growth opportunities.

市场主聚焦代理商的商业导向与内容创新实力，以此驱动品牌长效增长
在核心策划能力之外，商业战略思维与内容创新已成为代理商支持市场主寻找增长机会的必备延伸能力。

10 AI ADOPTION IS WIDESPREAD BUT STILL OPERATIONALLY FOCUSED
AI is already used by most marketers, mainly for content creation and efficiency gains, while integration, data quality, and ROI remain the main barriers to deeper impact.

AI 应用广泛，但仍以运营为主
大多数营销人员已经在使用 AI，主要用于内容创作和提升运营效率 。而整合度不足、数据质量问题及 ROI 不明确仍然是限制 AI 发挥更大作用的主要障碍。

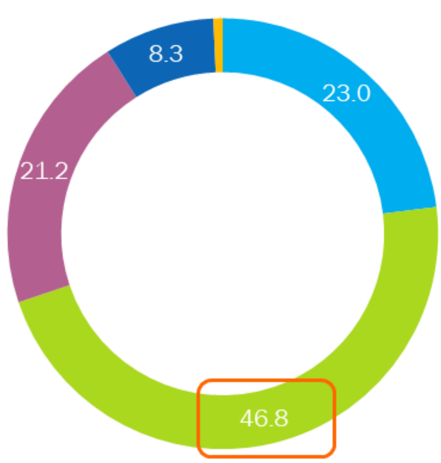
1 MARKETING BUDGETS PRIORITIZE ON SOCIAL MEDIA CAMPAIGNS AND CONTENT/KOL MARKETING
营销预算优先集中于社交媒体与内容/达人营销

In the allocation of marketing budget in China, branding and creative budgets account for **23.0%**, media and social budgets account for **46.8%**, experiential marketing and conversion budgets account for **21.2%**, customer operations and technology budgets account for **8.3%**, and other budgets account for **0.7%**.

在中国的营销预算分配中，品牌与创意预算占 **23.0%**，媒体与社交预算占 **46.8%**，体验营销与转化预算占 **21.2%**，客户运营与技术预算占 **8.3%**，其它预算占 **0.7%** 。

BUDGET SPLIT (ESTIMATED FOR MARKETING-COMMUNICATIONS-MEDIA)
预算分配（市场营销-传播-媒体预计）

SPLIT THE TOTAL MARKETING BUDGET BETWEEN...
请将贵公司的整体营销预算按以下类别进行百分比分配 ...



- BRANDING & CREATIVE (BRAND BUILDING, STRATEGY, CREATIVE, IMC CAMPAIGN)
  品牌与创意（品牌建设、策略、创意、整合营销活动）
- MEDIA & SOCIAL (MEDIA BUY, SOCIAL CONTENT, KOL BUY)
  媒介与内容运营（媒体采买、社交内容运营、达人采买）
- EXPERIENTIAL MARKETING & CONVERSION (EVENT, COMMERCE - INCL. EC & RETAIL)
  体验营销与转化（线下活动、商业营销 - 含电商、线下零售推广）
- CUSTOMER OPERATION & TECH (CRM, DATA & MARTECH)
  客户运营与技术（CRM、数据与技术）
- OTHER
  其它

BASES: MARKETING PROFESSIONALS INTERVIEWED IN 2026 (288). PROMPTED QUESTION. DATA IN AVERAGE OF NUMBER OF PARTNERS.

2 MULTI-PARTNER ECOSYSTEMS ARE THE DOMINANT OPERATING MODEL
多伙伴生态成为主流运作模式

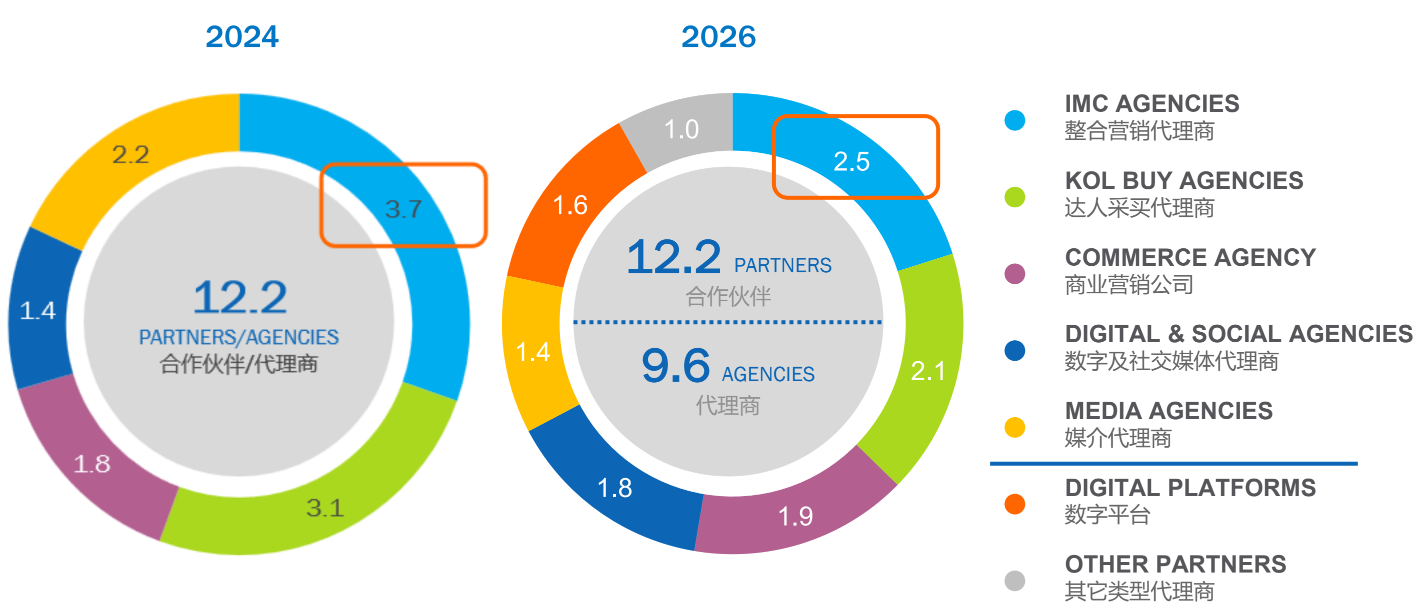
On average, in China, marketers work with **10 partners** to solve their diverse and specialized communication needs. This includes: IMC Agencies (**2.5**), Activation Agencies (**2.1**), Media Agencies (**1.9**), PR Agencies (**1.8**) and Other types of Agencies (research, consulting) (**1.4**). This is a consistent finding since the first edition of **AGENCY SCOPE** in China.

在中国，营销人员平均与 **10 家**代理公司合作，以满足其多样化和专业化的传播需求 。 其中包含：整合营销代理商 (**2.5** 家)、线下营销服务代理商 (**2.1** 家)、媒介代理商 (**1.9** 家)、公关代理商 (**1.8** 家) 以及其他类型的机构（调研、咨询）(**1.4** 家) 。

这也是《中国营销趋势研究》自在中国推出第一版以来的一贯结论 。

Structure of Companies (Marketers) 公司架构

10 DIFFERENT AGENCIES TO SOLVE MARKETERS' NEEDS (IN MARKETING-COMMUNICATION-ADVERTISING-MEDIA)
平均由 **10 个**不同的外部合作伙伴，解决营销人员的传播需求（涵盖营销、媒介等多方面）



BASES: MARKETING PROFESSIONALS INTERVIEWED IN 2026 (288). PROMPTED QUESTION. DATA IN AVERAGE OF NUMBER OF PARTNERS.

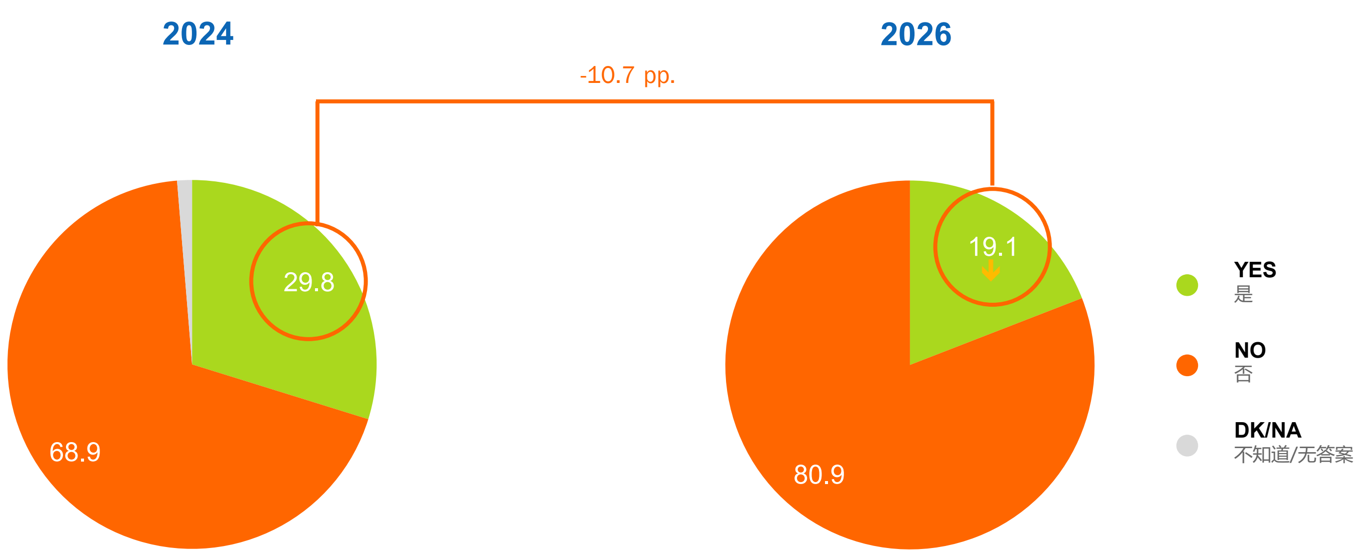
3 THE LEAD AGENCY MODEL CONTINUES TO DECLINE
主导代理商模式持续弱化

Only **19.1%** of marketers identify and work with a lead agency, confirming a clear shift towards decentralized, multi-partner coordination, below global averages (and markets such as the UK).

仅有 **19.1%** 的市场主确认与其主导代理商合作，这证实了市场正明显转向去中心化的多伙伴协作模式。这一比例不仅低于全球平均水平，也低于英国等成熟市场 。

Structure of Companies (Marketers) 公司架构

DO YOU HAVE A LEAD AGENCY? (ANY CURRENT AGENCY THAT LEADS AND COORDINATES ALL CLIENTS' COMMUNICATION NEEDS)
您是否有主导代理商? (指任何目前负责主导或协调客户所有传播需求的代理商)



BASES: MARKETING PROFESSIONALS INTERVIEWED IN 2024 (305) AND 2026 (288). SPONTANEOUS QUESTION. DATA IN PERCENTAGES (%).

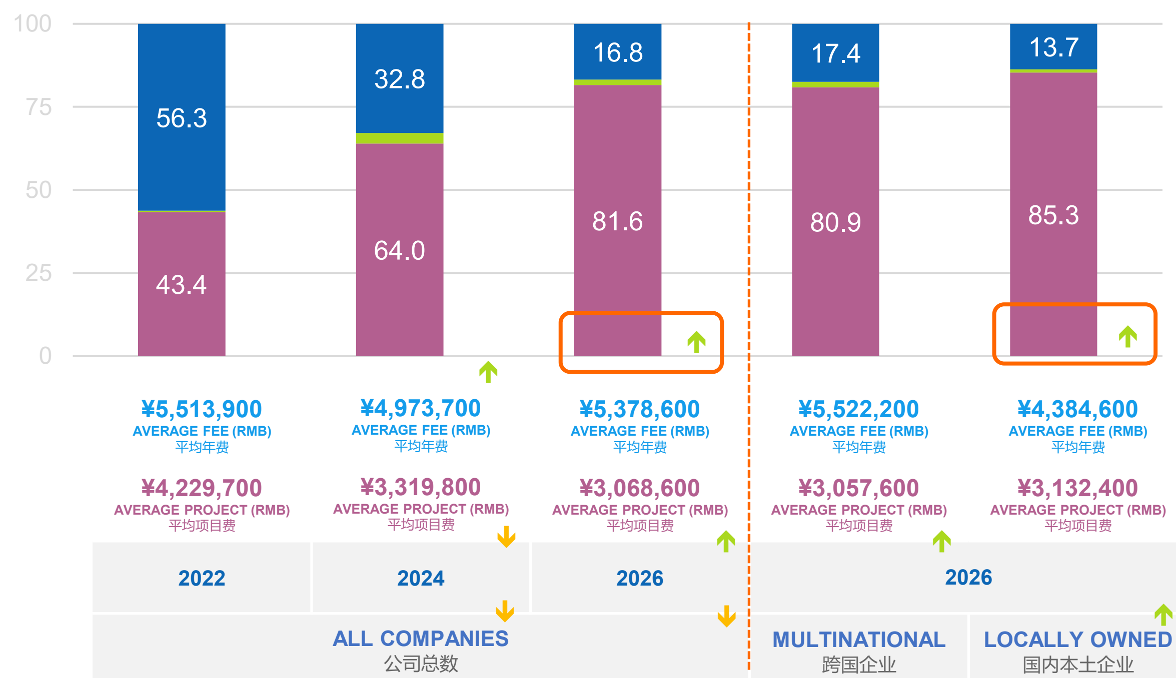
4 PROJECT-BASED RELATIONSHIPS DOMINATE CLIENT–AGENCY COLLABORATION
项目制合作主导客户–代理商关系

Client–Agency relationships remain stable in duration, but are increasingly managed on a project basis, with remuneration largely standardized around project fees.

客户与代理商的合作时长整体保持稳定，但合作方式正越来越多地以项目制进行管理；与此同时，报酬结构也基本围绕项目费用实现标准化。

Client-Agencies Relationships 客户与代理商关系

AGENCIES REMUNERATION MODEL (FEE-COMMISSION-PROJECT BASED) 代理商薪酬模式



- ONLY FEE / ANNUAL RETAINER 固定年费
- ONLY COMMISSION 按佣金
- ONLY PROJECT BASED 按项目付费

BASES: IMC AGENCIES ACCOUNTS ANALYSED IN 2022 (287), 2024 (426) AND 2026 (627). MULTINATIONAL (525) LOCALLY OWNED (102) ANALYSED IN 2026. PROMPTED QUESTION. DATA IN (%). AND AVERAGES (RMB).

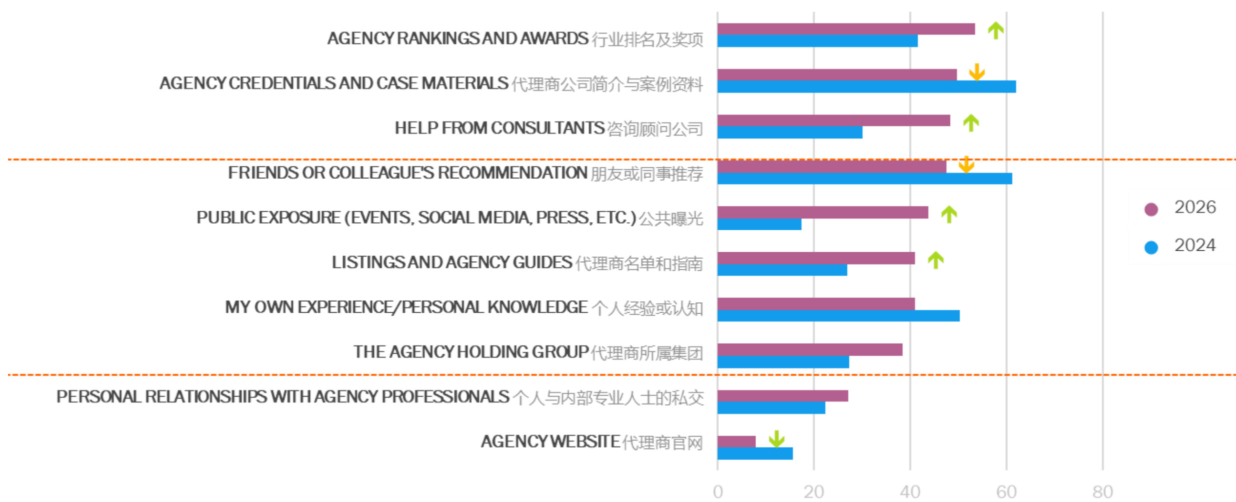
5 AGENCY SELECTION INCREASINGLY RELIES ON EXTERNAL VALIDATION
代理商甄选越来越依赖外部验证

Long lists are mainly built using rankings, awards, credentials, and peer recommendations, while direct contact with agencies or owned channels plays a limited role.

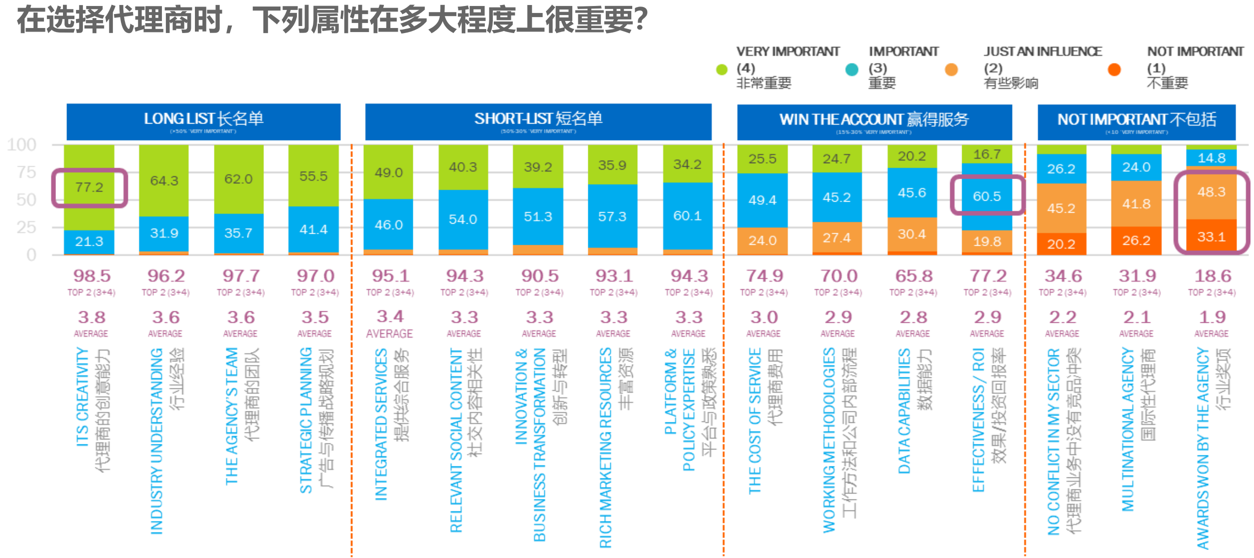
在建立长名单时，市场主主要依赖排名与奖项、资质案例以及同行推荐等外部信息来源，而与代理商的直接接触，或其自有渠道所发挥的作用相对有限。

Agency Selection 代理商选择

WHICH INFORMATION DO YOU USE TO PRODUCE A POTENTIAL AGENCY LIST?
在初期的代理商选拔过程中，您会使用哪些方式来搜集代理商名单



TO WHAT EXTEND THE FOLLOWING ATTRIBUTES ARE IMPORTANT WHEN SELECTING AGENCIES?
在选择代理商时，下列属性在多大程度上很重要?



BASES: MARKETING PROFESSIONALS 'WORK WITH IMC AGENCIES' INTERVIEWED IN 2026 (263). PROMPTED QUESTION. DATA IN PERCENTAGES (%) AND AVERAGES.

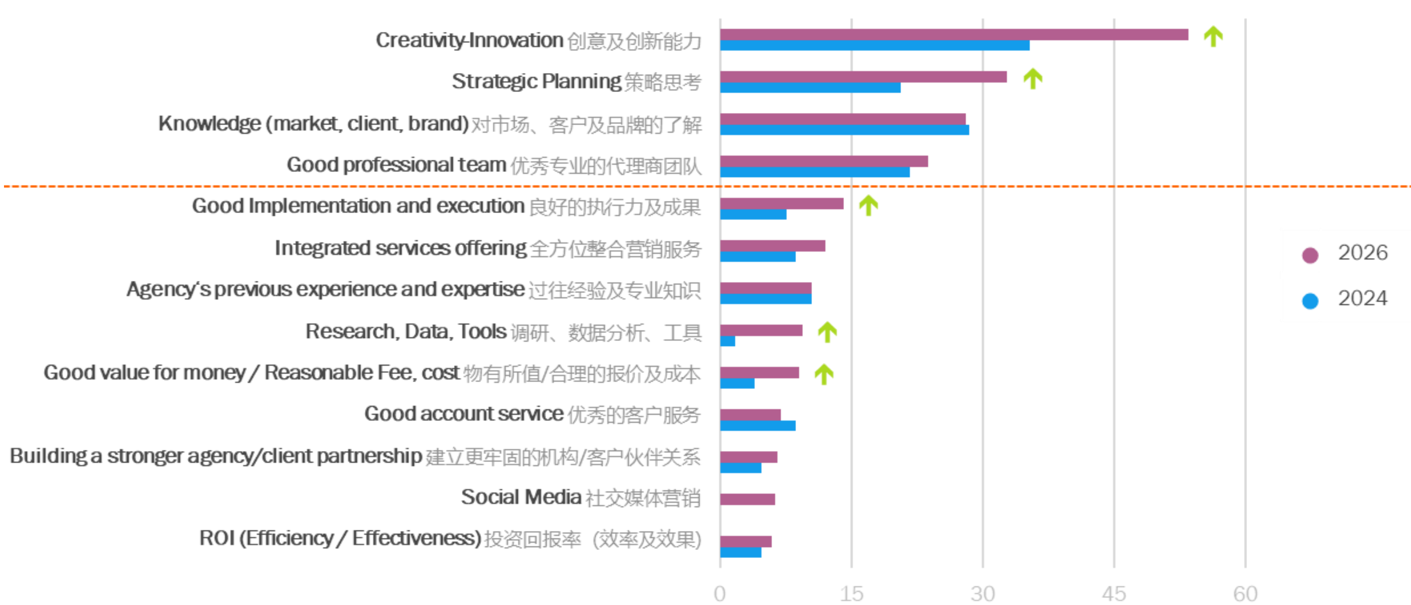
6 CREATIVITY AND STRATEGIC THINKING DEFINE THE 'IDEAL' AGENCY
创意与战略思维定义"理想" 营销代理商

The ideal agency profile is led by Creativity and Strategic Planning, followed by Market and Client Knowledge and a good professional team. Awards and experience lose relevance.

理想的营销代理商以创意能力和战略规划能力为核心，其次是对市场与客户的深入理解以及优秀的专业团队。奖项与过往经验的相关性正在减弱 。

Agency Selection 代理商选择

WHEN CONSIDERING THE 'IDEAL' AGENCY, WHAT ARE THE MOST IMPORTANT QUALITIES?
在考虑理想的营销代理商时，您最看重的品质是什么?



BASE: MARKETING PROFESSIONALS INTERVIEWED IN 2024 (277) AND 2026 (288). PROMPTED QUESTION. DATA IN PERCENTAGES (%).

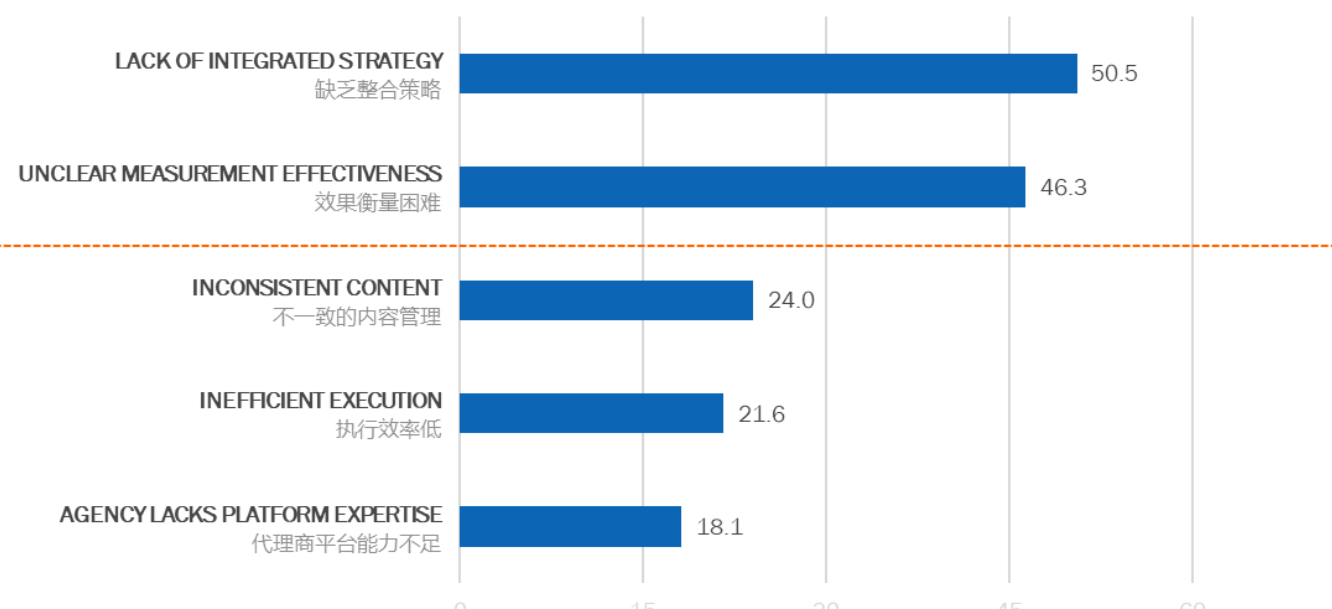
7 LACK OF STRATEGIC INTEGRATION AND MEASUREMENT DIFFICULTIES HINDER THE CROSS-PLATFORM COORDINATION
策略整合与效果衡量困难成为跨平台运营的最大瓶颈

The lack of unified strategic integration and a clear measurement mechanism has become the primary obstacle to enhancing cross-platform marketing effectiveness. It is imperative to break down platform barriers to address the management challenges posed by fragmented touchpoints.

跨平台运营的复杂性已超越执行层面，缺乏统一的战略整合与清晰的效果衡量体系已成为限制发展的核心障碍 。品牌需要打破平台壁垒，以应对碎片化触点带来的管理挑战。

New Trends 行业新趋势
NEW TOUCHPOINTS, NEW RULES 新触点、新规则

WHAT IS THE BIGGEST CHALLENGE YOU FACE WHEN OPERATING ACROSS MULTIPLE PLATFORMS?
在跨平台运营中，您面临的最大挑战是什么?



BASES: MARKETING PROFESSIONALS INTERVIEWED IN 2026 (287). PROMPTED QUESTION. DATA IN PERCENTAGES (%).

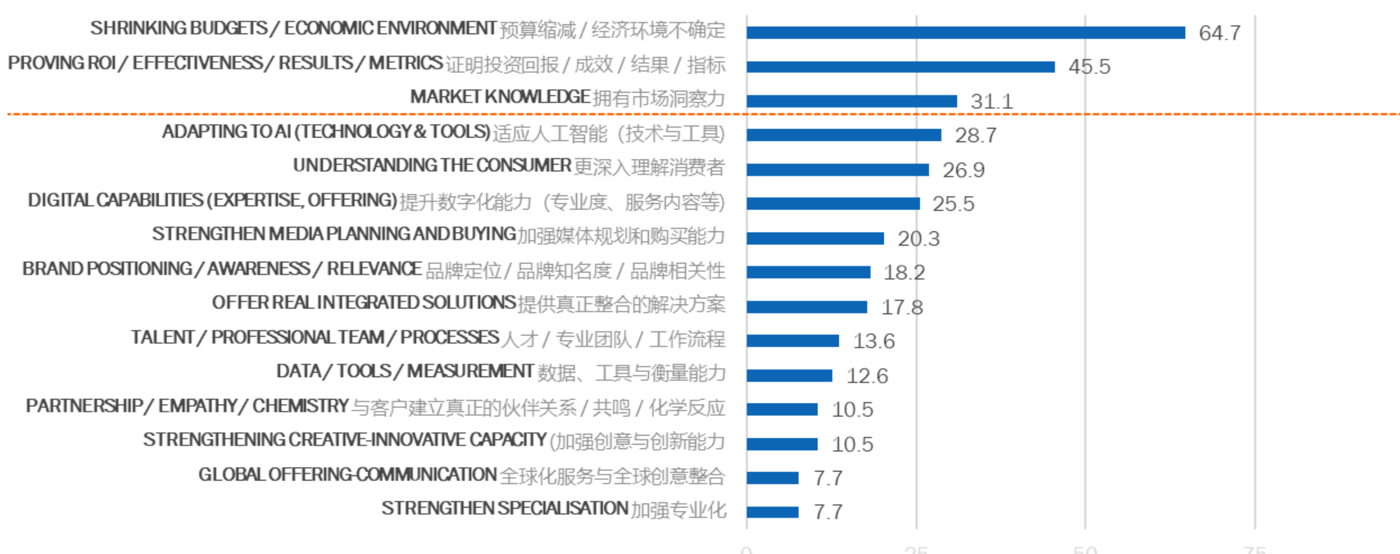
8 BUDGET PRESSURE AND ROI ACCOUNTABILITY SHAPE MARKETERS' PRIORITIES
预算压力与ROI问责正在重塑营销优先级

Shrinking budgets and the need to prove effectiveness are the main challenges for marketers, reinforcing a results-driven and performance-focused environment.

预算收紧以及对效果与投资回报率 (ROI) 的证明需求，已成为营销人员面临的核心挑战，这进一步强化了以结果为导向、以绩效为核心的市场环境。

Challenges for the Future 未来的挑战
CHALLENGES FOR MARKETERS 市场主面临的挑战

WHAT ARE THE BIGGEST CHALLENGES FOR MARKETERS?
您认为市场主未来面对最大的挑战是什么?



BASES: MARKETING PROFESSIONALS INTERVIEWED IN 2026 (286). PROMPTED QUESTION. DATA IN PERCENTAGES (%).

Bases: ACCOUNTS analysed in 2022 and 2024 (ALL COMMUNICATION AGENCIES: 509/627, 'WORK WITH IMC AGENCIES': 287/426). Prompted Question. Data in Percentages and NPS.

9 AGENCIES ARE EXPECTED TO ACQUIRE BUSINESS-ORIENTED AND CONTENT INNOVATION CAPABILITIES FOR GROWTH

市场主聚焦代理商的商业导向与内容创新实力，以此驱动品牌长效增长

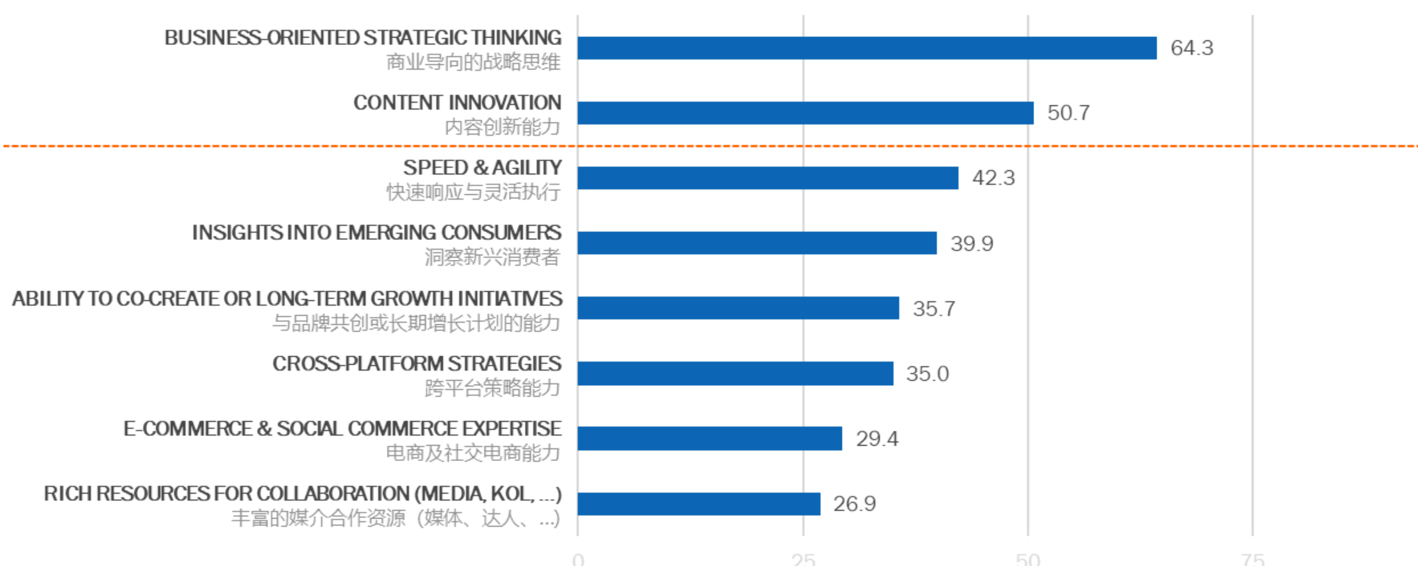
Beyond key planning capabilities, business-oriented strategic thinking and content innovation have become essential extended capabilities for agencies to support marketers in seeking growth opportunities.

在核心策划能力之外，商业战略思维与内容创新已成为代理商支持市场主寻找增长机会的必备延伸能力。

New Trends 行业新趋势

IN SEARCH OF GROWTH 寻找增长

WHEN SEEKING GROWTH, WHICH AGENCY CAPABILITIES DO YOU PRIORITIZE MOST?
在推动品牌增长过程中，您最重视代理商的哪些能力?



BASES: MARKETING PROFESSIONALS INTERVIEWED IN 2026 (287). PROMPTED QUESTION. DATA IN PERCENTAGES (%).

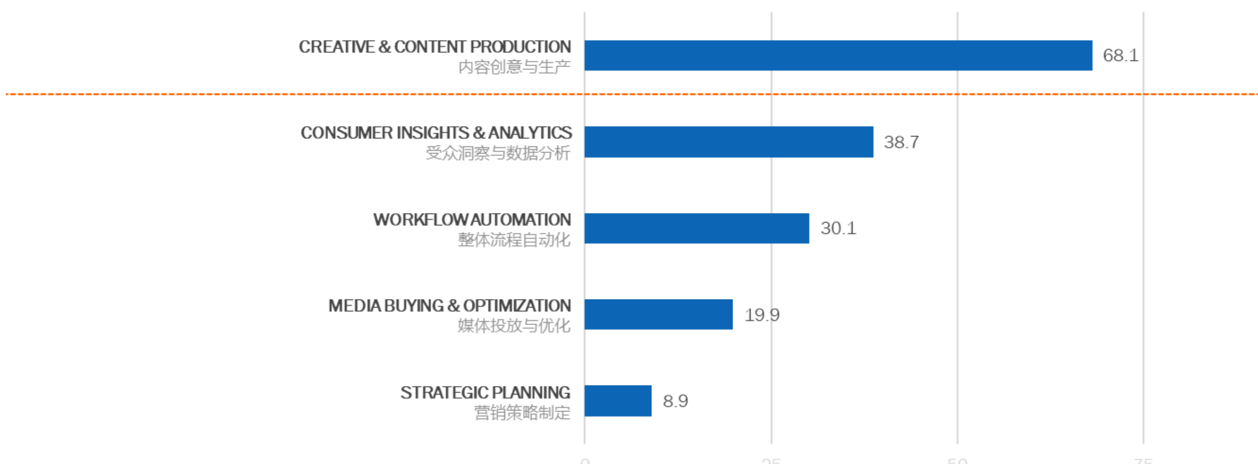
10 AI ADOPTION IS WIDESPREAD BUT STILL OPERATIONALLY FOCUSED
AI应用广泛，但仍以运营为主

AI is already used by most marketers, mainly for content creation and efficiency gains, while integration, data quality, and ROI remain the main barriers to deeper impact.

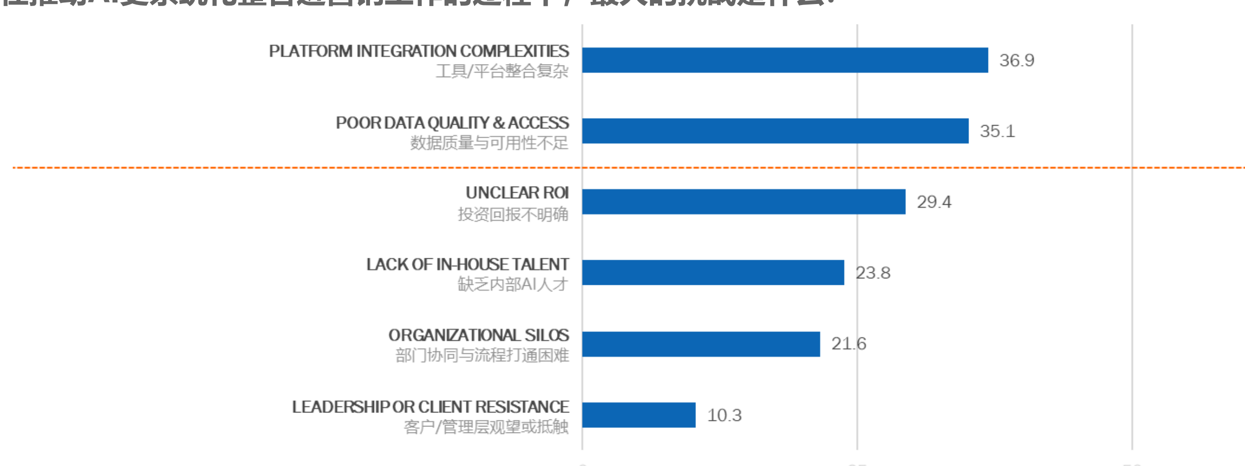
大多数营销人员已经在使用 AI，主要用于内容创作和提升运营效率 。然而，整合度不足、数据质量问题及 ROI 不明确仍然是限制 AI 发挥更大影响的主要障碍。

New Trends 行业新趋势
AI DEVELOPMENT 人工智能发展

IN WHICH AREAS HAS AI MOST SIGNIFICANTLY IMPROVED OPERATIONAL EFFICIENCY?
AI在哪些营销环节中最能提升效率?



WHAT IS THE BIGGEST CHALLENGE TO SYSTEMATICALLY INTEGRATING AI INTO MARKETING OPERATIONS?
在推动AI更系统化整合进营销工作的过程中，最大的挑战是什么?



BASES: MARKETING PROFESSIONALS INTERVIEWED IN 2026 (282). PROMPTED QUESTION. DATA IN PERCENTAGES (%).

2025/26 Three Key Marketing Trends Summary
2025/26 广告营销环境三大关键趋势总结

1

Value Accountability Emerges As Returns Diminish

回报递减 营销投入进入价值问责时代

Marketing shifts from expanding spend to demonstrating value through ROI and business impact.
营销正由单纯扩大投入，转向以 ROI 和业务成果来体现价值。

2

Fragmented Touchpoints Redefine Engagement Rules

触点碎片化 品牌连接规则被重写

Fragmented platforms require integrated engagement to drive real outcomes.
触点高度碎片化，整合协同成为实现有效转化的前提。

3

Growth Must Be Rebuilt from Market Shifts

增长需被重构 从市场变化寻找新引擎

As traditional levers weaken, new growth must come from shifts in consumer demand and media.
传统增长杠杆走弱，增长需从消费者需求与媒介变化中挖掘。

Bases: Marketing Professionals INTERVIEWED in 2024 (323) and 2026 (288). Prompted Question. Data in Percentages (%).

Market Growth Stagnation: Weaker Demand & Diminishing Marketing Returns
市场增长停滞：需求减弱与营销回报递减

China's marketing landscape is undergoing a structural reset:
中国的营销格局正在经历结构性调整：

47%

of consumers claim they only purchase necessities and avoid unnecessary spending.

消费者声称只购买必需品，避免不必要的消费

54%

of consumers prefer E-commerce platforms with low-price positioning as their first shopping priority.

消费者更倾向于低价定位的电商平台作为首选购物平台

68%

of marketers have reduced their marketing budgets due to the current economic climate.

市场主表示，因为当前经济环境削减了预算

54%

of marketers identify proving ROI/effectiveness/results/metrics as their 2nd highest challenge in the future.

市场主在未来面临的第二大挑战是证明投资回报/成效/结果/指标

Marketers And Agencies Are Facing Pressure To Prove The Value Of Every Investment
市场主和代理商正面临证明每一笔投入价值的巨大压力

Brands reward results, not just output. Agencies must evolve from execution vendors to growth partners.
品牌更看重结果而非产出，代理商需从“执行供应商”转型为“增长合作伙伴”

VALUE MEASUREMENT 价值评估

#1 Strategy Value Under Scrutiny
策略价值被重新审视

Misalignment between agency strategies and local consumer needs weakens perceived value
代理商策略与本土消费者需求脱节，策略价值受到质疑

Brands expect integrated brand + performance planning
广告主期待品牌与效果并重的整合型策略

#2 Output Value Harder to Measure
产出价值更难衡量

Fragmented marketing service segments raise the difficulty to measure the value of the agencies' output.
营销服务板块碎片化，增加衡量代理商产出价值的难度

Brands prioritize precise targeting, data insight and fast execution
广告主更关注精准触达、数据洞察与快速迭代能力

FINANCIAL 财务

#3 Financial Intervention of Budgeting
营销预算中的财务干预

CFO oversight of marketing spend has risen to 45%
CFO 对营销投入的监管比例升至 45%

Stronger demand for ROI visibility and cost efficiency
广告主对 ROI 可视化与成本效率提出更高要求

Prior Validation of “Why & Where” for Recalibrating Spending Decisions
前置梳理投放的“原因与板块”，重新校准花费决策

Why: Proving Spending Necessity
投放原因：证明花费的必要性

Pain Point - 痛点：

- Brands demand tight linkage between marketing spend and business outcomes
  品牌要求营销花费与业务绩效之间建立更紧密的联系

Implication - 启示：

- Prove its marketing’s irreplaceable impact
  证明花费板块在营销中不可替代的影响力

Where: Identifying High-Potential Investment Priority
投放板块：确定高潜力的投放优先级

Pain Point - 痛点：

- Declining conversion from broad-targeting campaigns.
  广泛目标营销活动的转化率下降

Implication - 启示：

- Contextual Budget Allocation: Focus spend on critical decision-making touchpoints.
  设定预算分配的前提条件：将花费重点放在关键的消费者决策触点上

How: Format & Execution Tactics
投放策略：执行建立在清晰判断之上

- It needs to sort out the “Why & Where” to invest, before proceeding to execution plan
  在着手执行计划前，需要先明确投放的“原因和板块”
- Success is defined by business impact, not execution output
  成效评估以业务影响为核心，而非执行产出

Scattered Touchpoints & Short Attention Span – Redefine Consumer Decision Journeys
触点分散与注意力短暂——重新定义消费者决策路径

1 Social ECommerce: Decision Journey Reshaped
社交电商：重塑决策路径

- Transitioned from the path of "Search-Compare-Purchase" to "Discover-to-Purchase" model.
从 “搜索-比较-购买”路径转变为“发现即购买”模式。
- Live EC creates real-time interaction + product showcases, for impulse buying.
直播电商创造实时互动与场景化产品
展示，转化冲动消费。

2 Short Video: Attention Paradigm Shift
短视频：注意力范式转变

- Shorter attention span force brands to capture interest within first 3 seconds.
用户的注意力变短，迫使品牌必须在前3秒内吸引用户的兴趣。
- Deeply engaged users demonstrate higher Lifetime Value (LTV)—by content hooks and immersive experiences.
内容吸引力和沉浸式体验，影响用户的深度互动与较长的生命周期价值（LTV）。

3 Private Traffic: Operational Importance Rise
私有流量：运营重要性的提升

- Enterprise WeChat + Mini Programs shift service to precision relationship management.
企业微信+小程序将服务转向精准关系管理。
- But most brand-owned channels degrade into discount hubs, requiring an upgrade to value-added experience community.
但大多数品牌自有渠道沦为折扣中心，需要升级为增值体验社群。

Rethinking Agency Models: Co-Creating Business-Led Multi-Touchpoint Strategies
从渠道导向转向业务主导：重塑代理商合作新模式

Facing a fragmented touchpoint ecosystem, single-channel or scattered executions are no longer sufficient to drive actual business growth. Agencies needs to establish a new service model centered on business results and cross-touchpoint integration.

面对碎片化的渠道生态，单一渠道或割裂式执行难以驱动实际业务增长。代理商须建立以业务结果为核心、跨触点整合的服务模型，尽量优化可衡量的商业价值。

#1 Strategic Reshape 策略重塑

From Trend Chasing to Business Gap-Filling
从“追逐风口”到“填补业务缺口”

- Strategy formulation should start with “what business target to achieve”
  策略制定始于 “需要达成什么业务目标”
- Define specific business KPIs, then match with the target audience, and the most effective touchpoints.
  先明确业务KPI，再匹配触达人群及高效的触点组合。

#2 Operational Thinking 运营思维

From Execution Focus to Holistic Synergy
从“单点运营”到“全域协同”

- Agencies need to understand/cooperate with the roles of each touchpoints.
  代理商需理解并配合各触点的角色
- Enhance the focus of user conversion and retention across the consumer journey.
  提高用户转化与留存在营销漏斗的关注度。

#3 Value Definition 价值定义

From Delivery Driven to Result Optimization
从“交付导向”到“结果优化”

- Agencies’ core value needs to be included in the contribution to ROI
  代理商的核心价值需要加入对ROI的贡献评估
- Adding “performance-based” elements into cooperation models, rather than just deliver on-time.
  加入“效果导向”的合作模型，不只是按时交付。

Category Spend Ratios Vary by Industry; It's Critical To Grasp Where The Strategic Focus Is Moving
市场主预算分配因行业而异：洞察营销战略重心的迁移方向至关重要

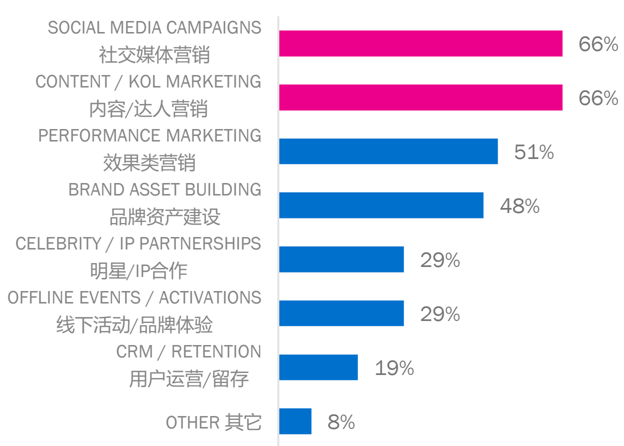
Social Campaigns & KOL Content are still the Focus under Budget Pressure
在预算压力下，社媒活动和KOL内容仍是重点

They become the primary vehicle for building trust, relevance, and influence.
它们成为建立信任、提升相关性和影响力的主要途径

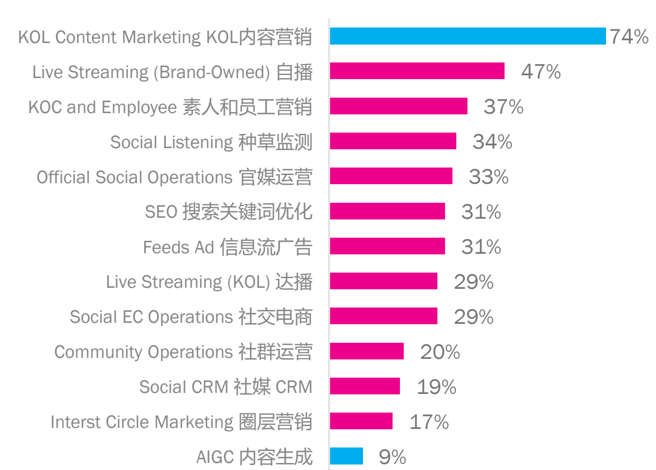
Different Spending Priorities, Different Brands' Consent
不同的花费优先级，不同的品牌共识

KOL content now accounts for most campaigns, yet different brands will have different preference on their social marketing vehicles.
KOL内容目前占据了主要营销活动，但不同品牌对其社交营销工具的偏好各不相同

Which Types Of Marketing Activities Are You Prioritizing Under Budget Pressure?
请问在预算受限的情况下，您会优先考虑哪些类型的市场活动？



Social Marketing Priorities
社交营销重点



Bases: Marketing Professionals INTERVIEWED in 2024 (323) and 2026 (288). Prompted Question. Data in Percentages (%).

Marketers' Expectations for AI Usage: Customization to Meet Actual Business Needs, Ensuring Quality and Safety
市场主的AI使用期望：定制化满足真实业务需求，保障质量与安全

The potential of AI in marketing
AI在营销中的最大潜力

- Enhance efficiency, reduce costs, and facilitate rapid iterations
- 效率与成本优化：提升效率和降低成本，快速的更新迭代

- Data collection and analysis capabilities can be optimized for trend prediction
- 数据能力强化：数据采集和分析能力可以优化，趋势预测

- Mass production of different types of content
- 多元内容产出：批量生产不同类型的内容

Key challenges of AI in marketing
AI在营销中的关键挑战

- AI generated creative can't be executed
- AI创意落地能力不足：内容需人力补充

- No clear application except content and ad optimization
- AI应用场景有限：只聚焦内容生成和投放优化

- Data security, accuracy, and compliance
- 数据安全与合规：数据安全性、准确性和合规性是最大挑战

- AI application makes users feel fake, and brand marketing is not serious
- 用户信任与真实性：AI运用让用户觉得假，品牌营销不走心

- Higher efficiency, but marketing personnel lose insight
- 人员能力弱化：效率更高，但营销人员失去洞察力

Bases: Marketing Professionals INTERVIEWED in 2024 (323) and 2026 (288). Prompted Question. Data in Percentages (%).

Managing Client Expectations Around AI's "Cost and Efficiency Gains" Is Critical Under Cost Pressure
成本压力下，合理管理客户对 AI「降本增效」的预期至关重要

The key tension for clients in agencies' use of AI lies in the dual expectation of "cost efficiency" and "high quality", two goals that current tools and capabilities still struggle to reconcile.

客户在代理商使用 **AI** 这一议题上的核心矛盾在于，同时期待“降本增效”与“高质量产出”，而当前工具与能力仍难以兼顾两者。

1. The Quality Gap 提高品质的落差

Clients overestimate AI's output quality, while current tools fall short on detail & creativity.

客户对AI的产出质量期望过高，而实际AI工具在细节、创意独特性上难以达到理想水平。

Marketers 市场主 - " Strong 'AI feel' in content and the quality is inconsistent, unable to meet our high-quality.“ “内容“AI感”太重质量不稳定，无法达到我们高质量的要求。”

Agency professionals 代理商同仁 - “Clients see other excellent AI works and demand the same effect; yet ignore the high threshold behind it.“ “客户看到优秀AI作品后便要求同样效果，却忽略其背后的高门槛”

2. The Cost-Saving Illusion 减低成本的错觉

Clients expect lower fees but need significant human refinement and the value of human strategy/creativity make simple price cuts unrealistic.

客户希望降低服务费用，但生成结果需要大量人工调整，且创意和策略价值无法被AI完全替代，难以简单降价。

Marketers 市场主 - “The quotation should be reduced accordingly after using AI.“ “使用AI后，应相应降低报价”

Agency professionals 代理商同仁 - "The client requested AI to generate high-level creative ideas but underestimated the cost due to a lack of understanding of the technical difficulty." “客户要求AI生成高难度创意，但不清楚技术难度而低估成本。”

3. Operational Constraints & Risks 操作的限制与风险

Unclear copyright and regulatory deter large-scale usage by major brands, compounded by a lack of high-quality training data.

版权、法规不明确使大品牌不愿意大规模使用；缺乏高质量数据训练模型。

Marketers 市场主 - “We have concerns about data security and sometimes are not be able to provide core data.“ “我们对数据安全也有顾虑，有时候确实无法提供核心数据。”

Agency professionals 代理商同仁 - “The development of the AI tools themselves requires integration with both consumer data and brand-side data, which is currently one of the major challenges in optimization.” “AI工具本身的发展，需要和消费者与品牌端数据打通，这是目前优化的一大难点。”

Bases: Marketing Professionals INTERVIEWED in 2024 (323) and 2026 (288). Prompted Question. Data in Percentages (%).

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