



2022/23

CHINA PR SCOPE STUDY

EXECUTIVE SUMMARY REPORT

The Seventh Edition 第七版

An R3 Report

The 2022/23 China PR Scope is the seventh 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 and procurements 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 this help to elevate the transparency and professionalism of marketing and public relations in China.

2022/23公关行业趋势研究是在中国市场进行的第七次研究，其目的是为了更深入地了解中国公关行业的发展与变迁。我们的数据来源于对本土/国际领导品牌的资深市场决策者及采购的一对一深访而收集所成。

该研究作为战略工具，对不断变化的市场主-代理商关系进行了解析，深入地剖析了代理商在市场上的认知。

我们对投入时间参与此项综合性研究的所有受访者表示真诚感谢。

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。



PARTICIPANT NUMBERS 参与受访者数量

Marketers Interviewed 受访市场主	2022	2021	2020
Marketers on PR agencies (individual) 受访客户人数	125	121	152
Client-Agency relationships analyzed 受访客户与公关代理商关系	168	139	176

Other Professionals Interviewed 其他受访的专业人士	2022	2021	2020
Procurement (individual) 采购主管	25	22	32
Senior Professionals working in PR agencies 资深公关代理商同仁	70	80	59

PARTICIPATING BRANDS 受访公司/品牌

109 brands interviewed, 45 agreed to appear as participants

109 家被访问的品牌，其中有45家品牌同意露出logo

PR AGENCIES ANALYZED 被分析的公关代理商

54 agencies with at least one client evaluated in this research

54家代理商，每家至少被一位客户评估

INTERVIEWEE PARTICULARS: MARKETERS

受访者信息: 市场主

Gender 性别	2022	2020	2018
Male 男	23.7	24.7	38.8
Female 女	76.3	75.3	61.2

Position 职位	2022	2020	2018
President, CEO, GM 总裁, 首席执行官, 总经理	1.8	1.3	5.3
PR/Communications Director 公关/媒体关系总监	25.4	16.9	9.9
PR/Communications Manager 公关/媒体关系经理	26.3	19.5	44.7
Marketing Director 市场总监	10.5	14.3	9.2
Marketing Manager 市场经理	18.4	7.8	22.4
Brand Director 品牌总监	6.1	2.6	4.6
Brand Manager 品牌经理	2.6	13.0	8.6
Others 其它	7.0	7.8	8.6

City 受访者地区分布	2022	2020	2018
Shanghai 上海	66.6	71.4	50.0
Beijing 北京	17.5	18.2	25.7
Guangdong 广东	6.1	9.1	13.2
Other 其他	9.6	1.3	11.1

Tenure (Average Years) 任期 (平均年数)	2022	2020	2018
Current Position 当前职位	5.3	4.4	4.01
Current Company 在该公司任职	5.4	4.7	5.08
In This Industry 在行业	12.0	*	*

Role 职责	2022	2020	2018
Director Above 总监级别或以上	51.8	42.9	26.3
Middle Management 非总监级别	48.2	57.1	73.7

Note: Marketers interviewed 2022 (125), 2020 (121), 2018(152), data in %

RESEARCH OVERVIEW 研究概况总览

DATA UNIVERSE 大数据范围

Our Universe comprises of **all senior marketers who are responsible for PR / Communications in China**. To participate in this study, their companies must be currently working with at least one PR agency in China, with each individual having to be involved in the decision-making process for selecting agencies and approving the work of their agencies. All participants 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，必须至少与一家处理公关业务的代理商处于合作关系。

每家公司的受访人员必须有话语权，能够直接参与挑选以及核定代理商的工作。同时，持续地与代理商进行合作互动。

除了**胜三**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 样本

168 client-agency (PR) relationships analyzed. In addition to interviewees in marketing departments of client companies, we also interviewed the following professionals to complete the study: **Procurement (25 participants)** and **Agency professionals (80 participants)**.

我们针对**109**家公司/品牌的**125**位客户的**168**个客户-公关代理商关系进行分析。除了市场主，我们也采访了以下行业专业人士以确保研究的丰富性：**采购主管（25人）代理商同仁（70人）**。

QUESTIONNAIRE 问卷

Semi-structured questionnaire with further open-ended questions that allowed interviewees to provide in-depth opinions. All quotes referring to each subscribing agency were included in the Individual and Confidential Report prepared for that specific agency.

半闭式的问卷与开放式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 Procurement completed **phone/face-to-face interviews**.

Online interviews were conducted for agency professionals (also included were in-person visits by R3).

针对资深市场管理层或采购专业人士的访谈主要以**电话访谈**的形式进行（部分受访者先线上作答，胜三咨询顾问后续电话跟进）。代理商同仁主要**线上问卷调查**（部分信息来自胜三咨询顾问走访）。

DATES OF FIELDWORK 调研阶段

Interviews with Marketers and Procurement were conducted from **August to October 2022**. Interviews with agency professionals were conducted in **October 2022**.

在**2022年8-10月**期间，我们进行了市场主管/采购主管的访谈。在**2022年10月**期间，我们进行了代理商同仁的调研。

KEY PR & COMMUNICATION TRENDS

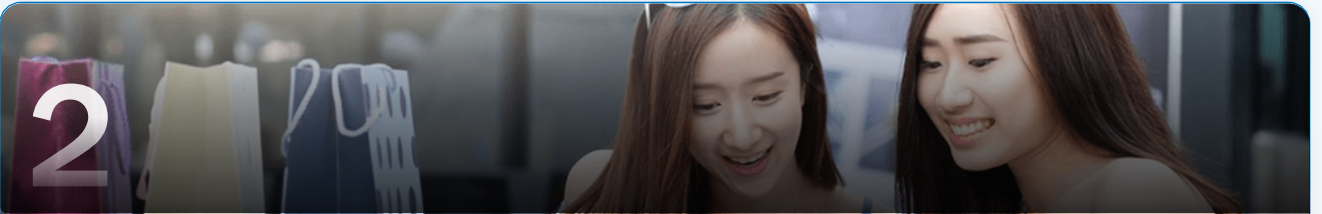
主要传播趋势



1

Digital Marketing Is Becoming More Fragmented

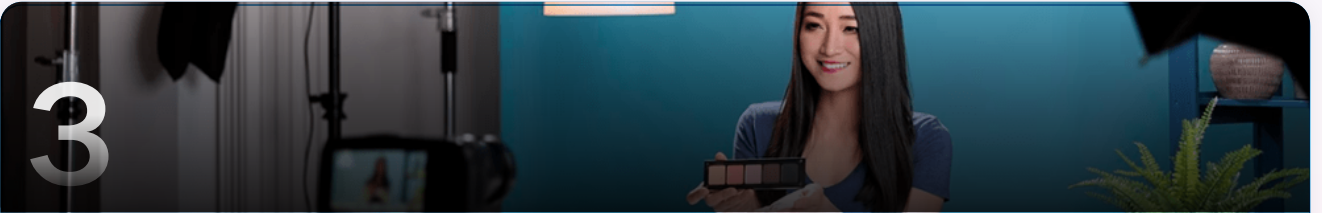
The ever-evolving digital ecosystem has made marketing in China more complex



2

The Rise of Gen Z's 'Young Free Spenders'

Gen Z's social circles are defining marketing's future. The value of a Social Circle is not only defined by its reach and scale, but also by its depth and significance.



3

Content Marketing Remains A Key Battleground and Integrated Content Marketing Creates A Holistic Journey

Content partnership is popular and will remain so in near future, while integrated content marketing creates a holistic journey.

1. 10 KEY FINDINGS 十大主要洞察

1 Being agile and responsive is a top priority for all businesses

灵活及敏捷地应对变化是所有企业的重要课题

Since the pandemic, offline activities have been reduced by 50%.

Marketers have become more conservative and pay more attention to risk management, digital and precision marketing communication. Overseas markets remain a blue ocean for Chinese brands.

自2019年疫情发生以来，线下活动量削减50%，市场主变得更保守更关注风险管理，对于数字和精准营销传播更为看重，此外，海外市场对于中国本土出海品牌仍属于蓝海。

2 CSR requires PR agencies to demonstrate greater ability in high-level strategic thinking and planning

公关代理商需要在企业社会责任方面展现出高层次战略思考和规划能力

International brands have demonstrated more comprehensive planning ability when it comes to CSR, while local brands have room for improvement. Marketers have limited knowledge of PR agencies' services in this area (i.e., KOL marketing, competitive product analysis and strategic consulting).

国际品牌主对于CSR的关注和策划方面比较综合，占有明显优势；本土品牌发展空间较大。品牌主对于代理商在这方面能够提供的专业服务的能力认知有限，例如KOL营销，竞品分析和战略咨询等。

3 In-house resources have experienced some degree of integration

品牌主内部资源及架构经历了不同程度整合

43% of marketers mentioned that marketing and PR functions have experienced some degree of integration in the past year. Corporate PR remains relatively independent.

43%的受访客户表示内部市场和公关部近一年中经历了不同程度整合，但企业公关业务仍相对保持独立。

4 PR agencies can differentiate themselves by highlighting service capabilities, competitiveness through innovation, and resources acquisition

公关代理商可以通过突出服务能力、创新及资源来实现差异化，提升竞争力

17% of marketers mentioned that PR agencies are being squeezed by other types of agencies, while 10.7% said PR agencies generally lack a holistic mindset. Besides maintaining the advantages in Corporate PR/crisis management/media relations, PR agencies are faced with challenges from brand in-house and creative agencies in brand communication planning. talents or tools investment in entertainment, social ,data, technology, e-commerce are very necessary.

17%的品牌主表示公关代理商的工作被其他类型代理商挤压，同时，10.7%的品牌主表示代理商普遍欠缺全局观思维。传统公关范畴的职责，如企业公关/危机管理/媒体关系等公关代理商继续保持其比较大的优势外，公关代理商面临着来自品牌方内部和创意代理商的品牌传播策划管理中的挑战，娱乐&社交营销的资源，数据，技术，电商等人才或工具投入是十分必要的。

2. 10 KEY FINDINGS 十大主要洞察

5 PR agencies are still perceived as 'traditional', integrated thinking is the key factor of being a leading agency

公关代理商整体形象相较创意代理商比较“传统”，整合策略思维是领导力的关键要素

Nearly 80% of marketers mentioned there is no need for PR agencies to play the role of being a leading agency, but integrated thinking and execution are key.

有近80%的品牌主提到不需要公关代理商扮演主导代理商的角色，但整合策略思维与执行力仍是关键。

6 Industry insights, strategic planning and creativity are the foundations of an 'Ideal' agency

行业洞察，策划能力及创意方面的贴合性是成为“理想”代理商的重要前提

For the requirements of an “ideal” PR agency, Marketers and Procurement are mostly focused on professional skills (accounting for about 80%) : the understanding of industry/ brand business. creative content and brand fit is also been concerned, while procurements are more focused on the richness of media resources. In addition, nearly 20% of the focus is on the day-to-day operations : team stability and collaboration. Moreover, value for money is also a key indicator for procurement.

对于“理想”公关代理商的要求，市场部和采购部需求都大部分集中在专业技能方面（占80%左右）：对于行业/品牌业务的理解都是第一位的；市场部同时也非常关注创意内容和品牌的贴合性，而采购相对更关注媒体资源的丰富性。另外，有近20%的关注点在于日常团队的运营上面：团队稳定性和配合度。同时，对于采购来说性价比也是一个关键指标。

7 Marketers are more satisfied with the performance of their PR agencies, compared to other agencies

与其他类型代理商相较，公关代理商的客户满意度最高且保持稳定

From the perceptive of the average number/ duration of the current PR agency, the client- PR agency relationship remained stable and is more stable than other agencies. 86.4% of marketers said they were satisfied with the service of their existing PR agencies, and 78.6% of marketers said they would not stop the current relationship.

从平均合作公关代理商数量/合作时长等维度来看，公关代理商与客户之间的关系保持稳定，且都要比其他代理商稳定一些，86.4%的受访客户表示满意其现有代理商的服务，78.6%的客户表示不会停止目前合作关系。

3. 10 KEY FINDINGS 十大主要洞察

8 Marketers are placing greater focus on brand-related KPIs

品牌主更加关注品牌相关指标

Compared to the last four years, performance-driven KPIs decreased significantly this year (such as View/Click/Engagement, Online and offline traffic, sales growth). Brand related KPIs are increasing. For example, quality and quantity of media reports, and social buzz. Compliance and cost control, strategy output and volume of creative work are new mentions.

对比过往两届品牌主的KPI设定，今年效果类关键指标明显下降，例如浏览量/点击量/互动量，进店人数/网店人数，销售增长等，而品牌相关指标部分维度有上升，尤其是媒体报道数量/质量，品牌舆论走向等，合规性，成本控制及策略输出质量是今年新被提及的KPI。

9 International agencies take an integrated view, while local agencies are digital specialists

国际代理商更有全局观，而本土代理商数字营销能力更强

International agencies provide a strong integrated perspective, and corporate PR and crisis management. Local agencies specialize in social media, creativity and e-commerce.

国际代理商在全局观，企业公关，危机管理等能力上更胜一筹，而本土代理商在社交媒体，创意及电商等方面棋高一招。

10 Producing innovative content across channels that leads to business results will be the biggest challenge for China's marketers

对于品牌主来说，最大的挑战是跨渠道创新内容制作，并带来商业成果

Making products/brands stand out in a competitive market through continuous innovation is a common challenge for marketers. Other challenges include developing content for different channels/groups under the premise of satisfying brand innovation. The latter is more focused on how to create value through data and add value to the business. On the premise of deep understanding and participation in clients' business, agencies need to provide professional support in content and data to make progress together with clients.

如何通过持续创新使得自己的产品/品牌能够在嘈杂的市场中脱颖而出是品牌主普遍面临的挑战。在内容和数据方面也面临着诸多挑战，前者包括在满足品牌创新的前提下，针对不同渠道/人群提供相应内容；而后者更关注如何通过数据创造价值，为业务加持。代理商需要在深度理解和参与客户业务的前提下，针对内容和数据给到专业支持与客户一同进步。

FINDING 1

Being agile and responsive is a top priority for all businesses 灵活及敏捷地应对变化是所有企业的重要课题

How has the pandemic affected your brand?
e.g., business impact, budget increase or decrease,
communication focus)

动态清零，尤其今年上海Lockdown,对于你们品牌营销沟通有什么影响？
(例如生意层面，预算或营销侧重点等)

2022 2020

46.9% (vs. 29.6%)

Campaigns have to **stop** and **focus on online** platforms (e.g., Wechat & Weibo, Video account, Red, Douyin, etc)

线下活动被停摆，聚焦于线上平台(如：双V，视频号，小红书，抖音等)

14.6% (vs. 4.23%)

Our usual strategy takes risks into account, so **it didn't have a big impact.**

无太大影响，我们在平时有做准备**对抗风险**

11.5% (vs. 5.63%)

Prefer **precision marketing**, **ROI** is key.
越来越看重**精准营销**，以**ROI**为导向

9.4% (vs. 11.27 %)

Branding level campaigns' **budget have been cut**;
survival is priority.

品牌层面的营销预算大幅度缩减，生意受损严重；考虑存活更重要

5.2 %

Focus on **overseas markets**, a blue ocean for us
聚焦海外市场，**海外市场**一片蓝海

5.2 %

Biggest impact is from **logistics** and **supply chain** issues that is damaging the business directly
最大的负面来自于**物流**和**供应链**受到影响，直接影响生意

3.1% (vs. 23.94%)

The discourse system for external output has been greatly adjusted as we become **more cautious** about key communication content, e.g: Will pay more attention to the tonality of the content associated with healthy life or the global brand will rely more **on the global voice to convey the message**
向外输出的话语体系有了很大调整，传播内容重点，相较以往会**更谨慎**，例如：会更看重内容的调性与健康生活的链接或者global品牌会**更仰仗于 global发声**

2.1%

Communication channel strategies have been adjusted: e.g. **traditional media shifted more to digital channels**

传播渠道策略有调整：例如**传统媒体转向数字媒体**

Note: Marketer Interviewed In 2022 (125), 2020 (121), Data in %.

FINDING 2

CSR requires PR agencies to demonstrate greater ability in high-level strategic thinking and planning

公关代理商需要在企业社会责任方面展现出高层次战略思考和规划能力

To Marketers:

If your brand was to start looking into CSR or ESG support from PR agencies, what scope would you imagine you'd need support for?

问品牌主：

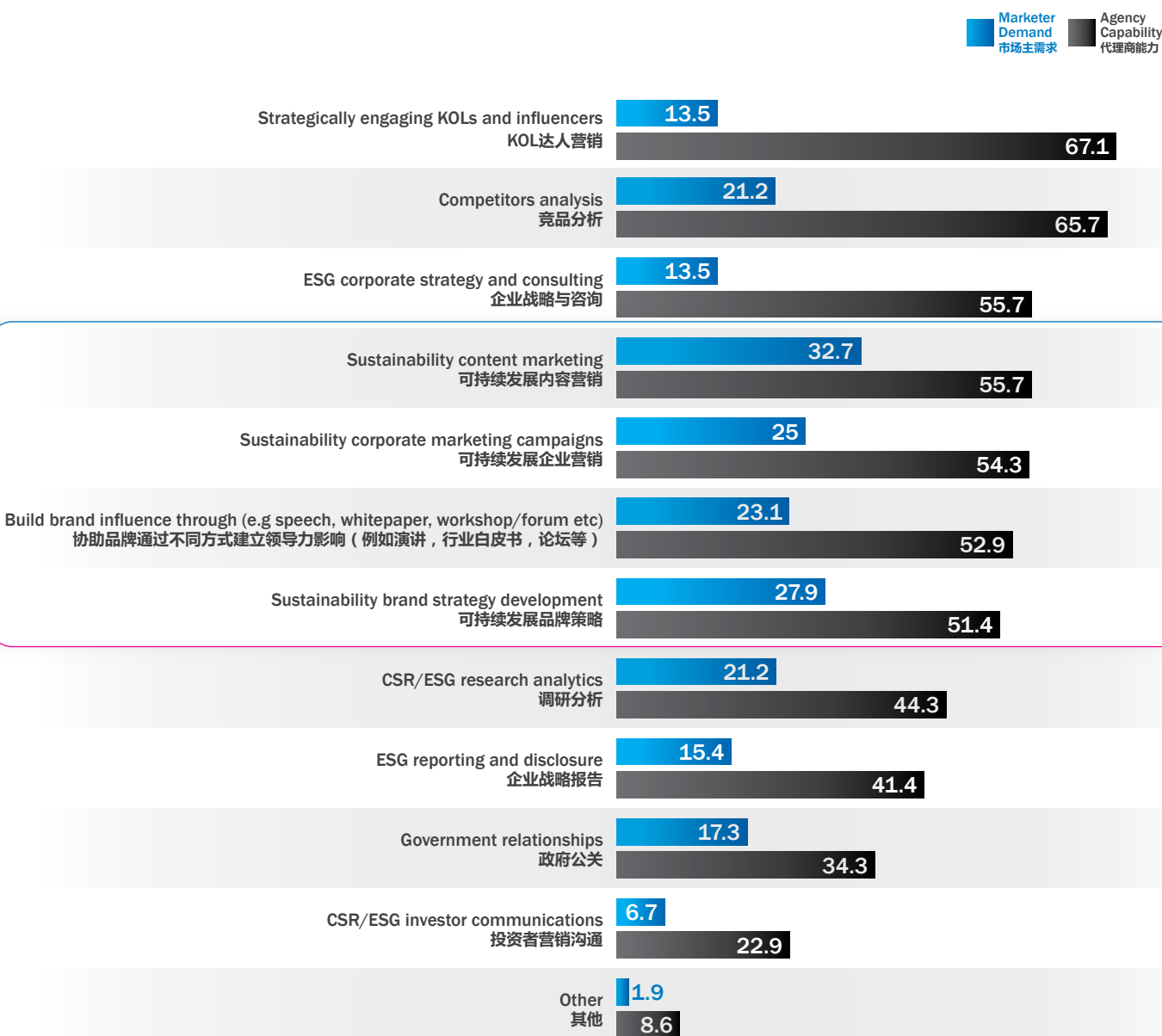
如果贵品牌需要寻求公关代理商在CSR/ESG方面的协助，您期待他们给到您哪些方面的支持？

To Agencies:

What kind of CSR/ESG skills and expertise do you think you can provide to your clients ?

问代理商：

贵司在哪方面的CSR/ESG技能和专业可以提供给客户？

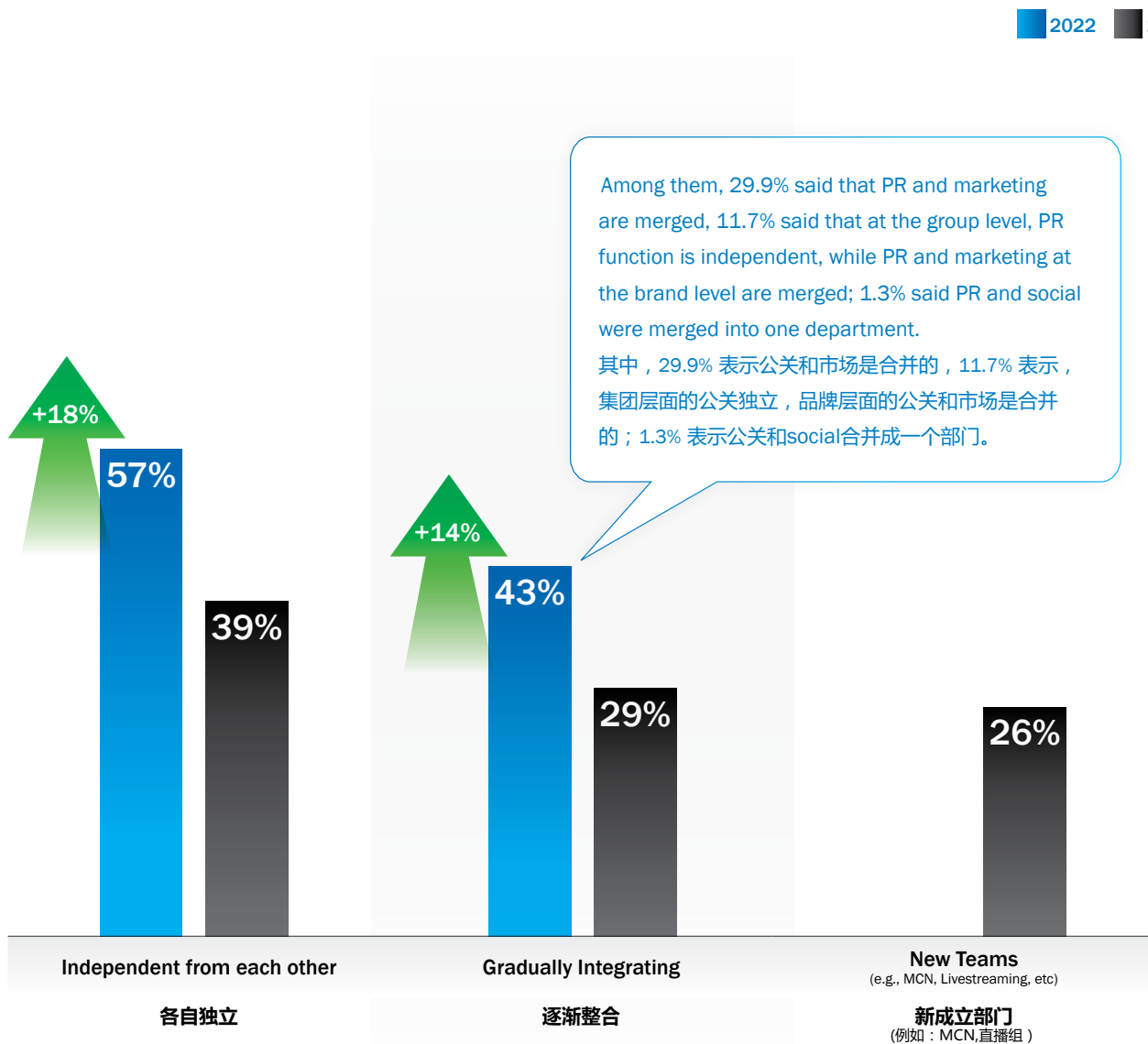


Note: Marketer Interviewed in 2022 (125), Agency professional (70), Data in %.

FINDING 3

In-house resources have experienced some degree of integration 品牌主内部资源及架构经历了不同程度整合

Has there been any changes to your internal PR & Marketing team structure in recent years?
最近几年，贵品牌内部公关和市场结构有变化吗？如果有，请说明主要变化在哪些方面。



Note: Marketer Interviewed In 2022 (125), 2020 (121), Data in %.

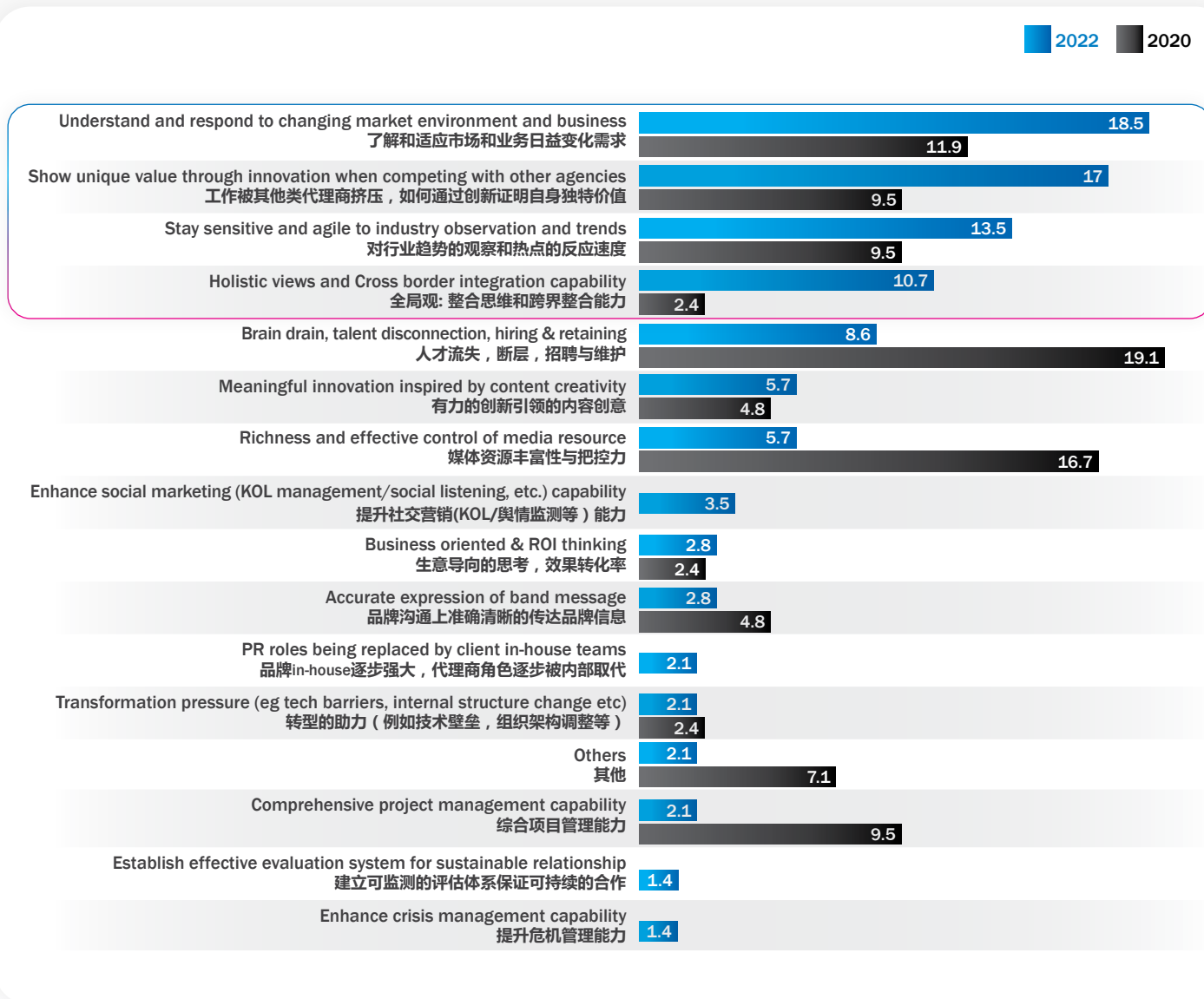
FINDING 4

PR agencies can differentiate themselves by highlighting service capabilities, competitiveness through innovation, and resources acquisition

公关代理商可以通过突出服务能力、创新及资源来实现差异化，提升竞争力

What are the biggest challenges PR agencies will face in the future?

您认为公关代理商面临的最大的挑战是什么？



Note: Marketer Interviewed in 2022 (125), Agency professional (70), Data in %.

FINDING 5

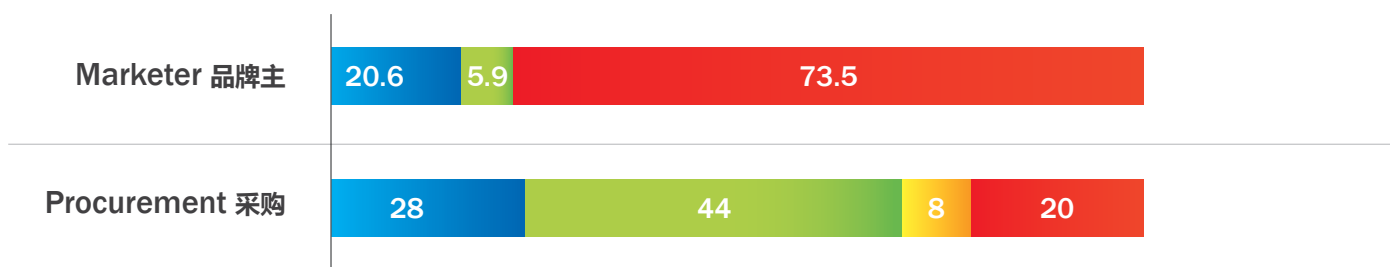
PR agencies are still perceived as ‘traditional’, integrated thinking is the key factor of being a leading agency

公关代理商整体形象相较创意代理商比较“传统”，整合策略思维是领导力的关键要素

Without mentioning names, would you consider inviting a PR agency to play a ‘leading agency’ role? Why?

不提名字，您会考虑邀请公关代理商做您的主导代理商吗？为什么？

Yes 会 Open to Talk 看情况 Not Sure 不清楚 No 不会



What We Heard from Marketers*

“I don’t care about the type. The current agency positioning is relatively broad; I will consider anyone with **integrated thinking** and overall consideration of my business.”

“不在乎类型，目前的代理商定位比较广泛；具有**整合性思维**，对我生意有通盘考虑的，我都会考虑。”

“**The brand has to take the lead itself**, otherwise there is no point of our existence; moreover, agencies are comprehensive enough. In my opinion, the PR agency is still very **traditional**, and the overall capability is less than sufficient.

“**品牌自己来做主导**，要不然我们也没有存在的意义；而且，代理商视角不够全面。公关代理商在我看来还是很**传统**的，能力整体来说不够全面。”

What We Heard from Procurement*

“We have many **IMC** campaigns now, and PR agencies are transforming by expanding their scopes to handle more **integrated** cases. They need to have a deeper understanding of the industry, more advance-level **content** capability, and their own perspectives and not to blindly pursue Internet sensations.”

“我们现在有很多**IMC**战役，而公关代理商也在转型，扩大其服务范围，以处理更多**综合性**的项目。他们需要对行业有更深入的了解，有更强大的**内容**能力，有自己的观点，而非盲目追求网络爆点。”

“This is a very **fragmented** period with very decentralized consumer media consumption behavior. PR roots one will be less competitive than those **social driven** ones.”

“这是一个非常**碎片化**的时期，消费者的媒体消费行为非常分散。公关基因的代理商将比那些**社交基因**的代理商竞争力要小。”

Note: Marketer Interviewed in 2022 (125), Procurement (25), Data in %.

FINDING 6

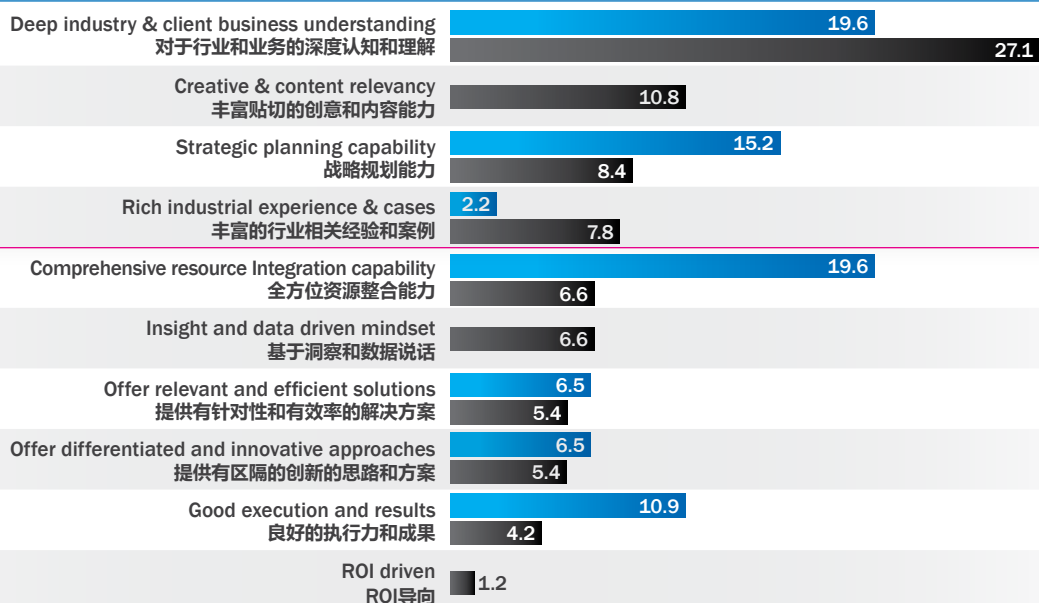
Industry insights, strategic planning and creativity are the foundations of an 'Ideal' agency

行业洞察，策划能力及创意方面的贴合性是成为“理想”代理商的重要前提

What is the criteria for an “ideal” PR agency?
您心目中理想的公关代理商应该具备哪些素质？

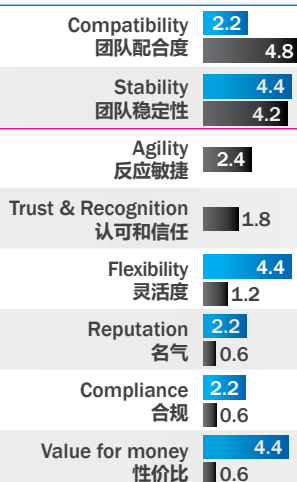
Professional Capability 专业技能相关指标

Procurement 采购 Marketer 品牌主



Team Operation 团队运营相关指标

Procurement 采购 Marketer 品牌主



Note: Marketer Interviewed in 2022 (125), Procurement (25), Data in %.

FINDING 7

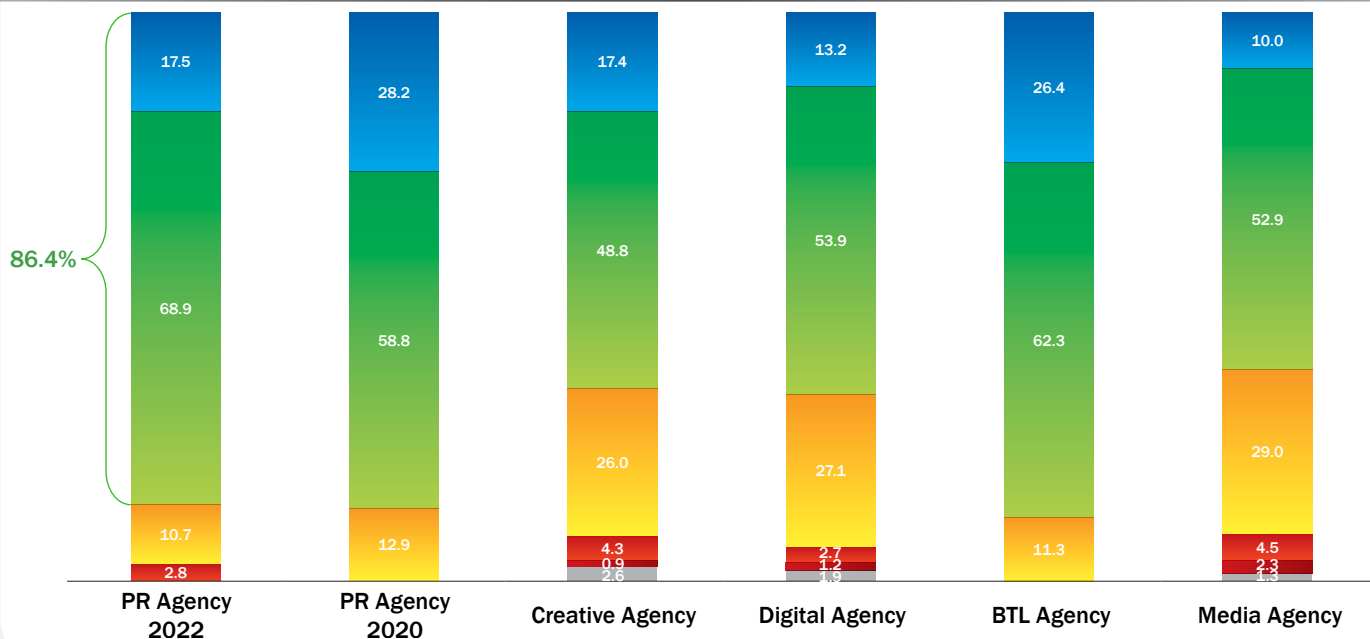
Marketers are more satisfied with the performance of their PR agencies, compared to other agencies

与其他类型代理商相较，公关代理商的客户满意度最高且保持稳定

Level of Satisfaction

公关代理商客户满意度

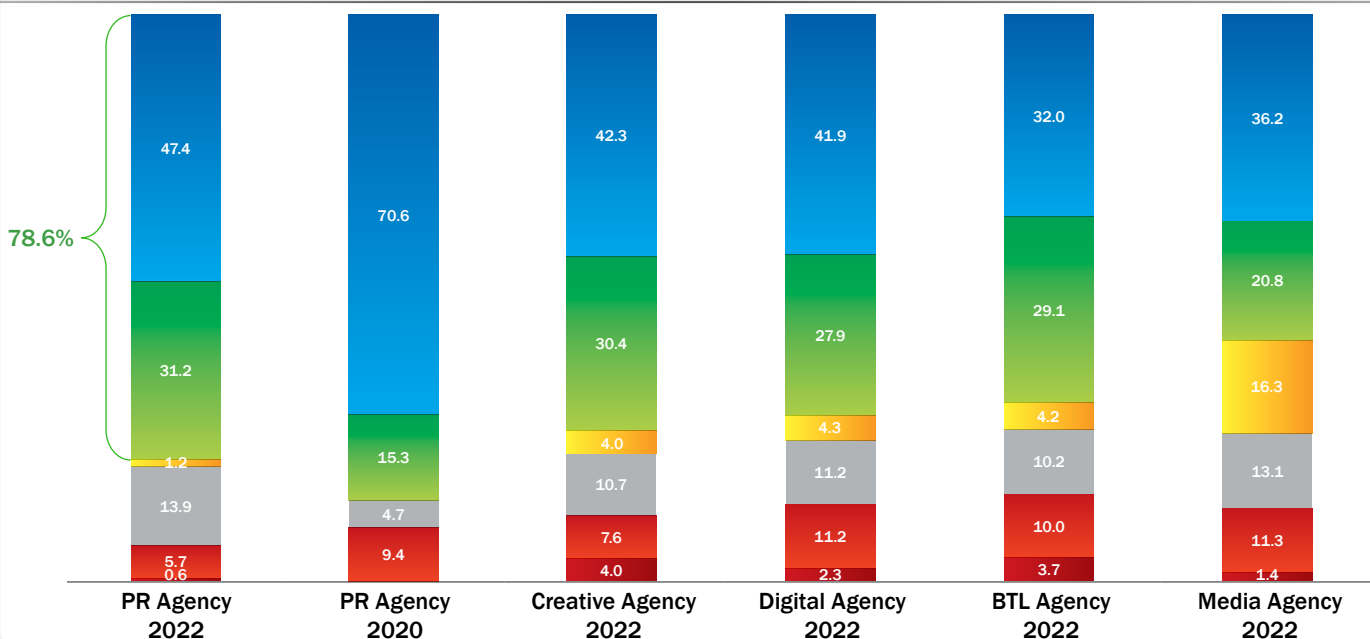
DK/NA Very dissatisfied 非常不满意 Dissatisfied 不满意 Indifferent 一般 Satisfied 满意 Very Satisfied 非常满意



Predisposition to Change

公关代理商更换倾向

Will definitely change 肯定会更换 Will probably change 可能会更换 Not for me to decide 不是个人决定 HQ to decide 总部决定 Probably will not change 应该不会更换 Definitely will not change 不会更换



Note: Client-Agency relationships in PR Scope 2022(168),2020 (139),2018 (176). Data in % and Average.
Client-Agency relationships in Agency Scope 2022: Creative (447), Digital (258), MKT Services (54), Media (221). Data in % and Average.

FINDING 8

Marketers are placing greater focus on brand-related KPIs

品牌主更加关注品牌相关指标

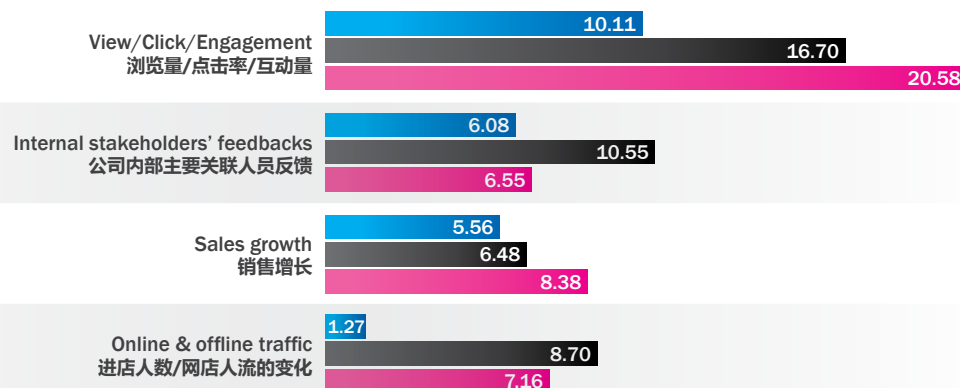
What KPI set-up do you use to evaluate your PR agency's performance?

对于公关代理商您有设定什么KPI来评估他们的表现吗？

Effectiveness Related

效果相关指标

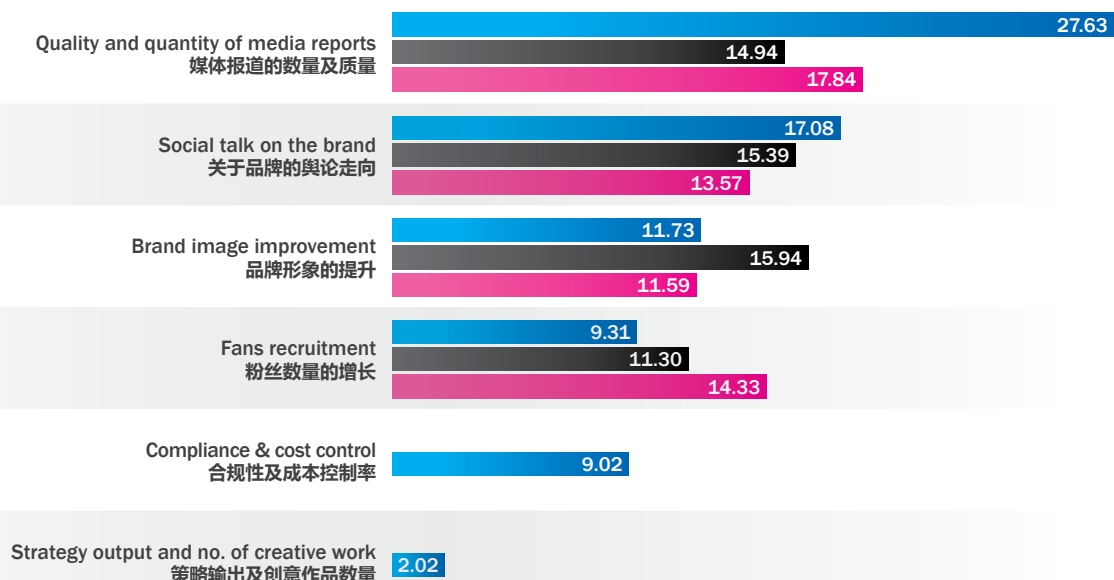
2022 2020 2018



Brand Related

品牌相关指标

2022 2020 2018



Note: Marketer Interviewed in 2022 (125)/2020 (121)/2018 (152) & Procurement interviewed in 2022(25)/2020(22)/2018 (32), Data in %.

FINDING 9

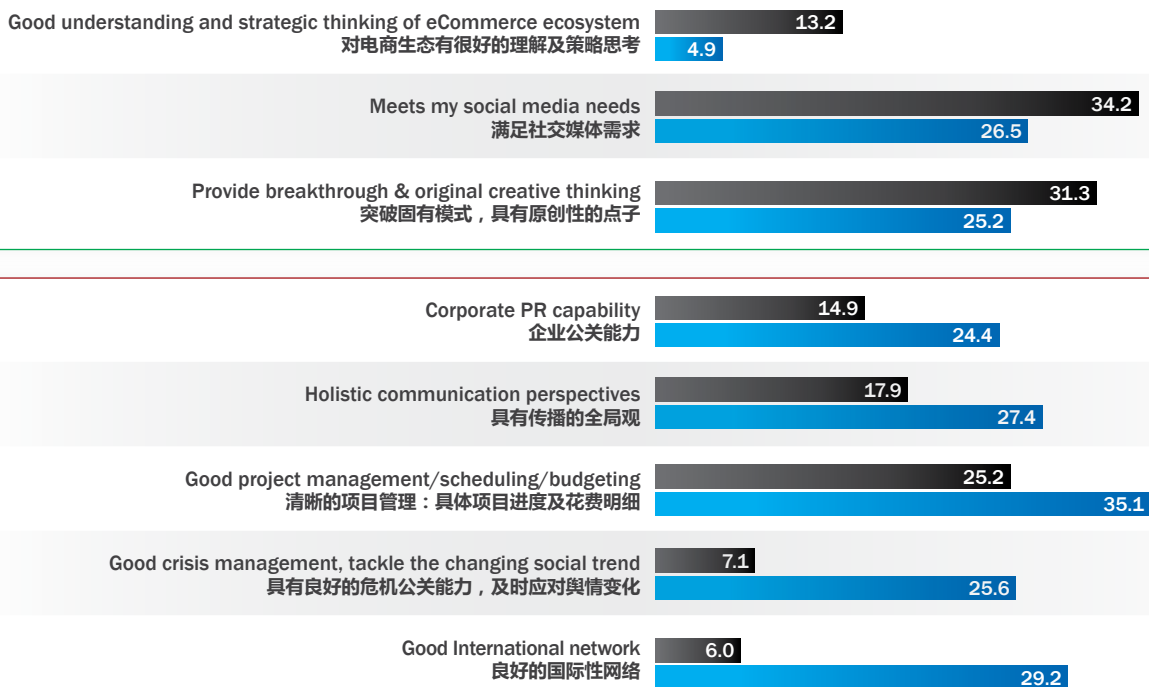
International agencies take an integrated view, while local agencies are digital specialists

国际代理商更有全局观，而本土代理商数字营销能力更强

What are the advantages and disadvantages of international and local agencies
您对国际和本土公关代理商各自的优劣势看法是？

Multinational Agency
跨国代理商

Local Agency
本土代理商



Note: Client-Agency relationships 2022(168), 2020 (139), 2018 (176). Data in % and Average.

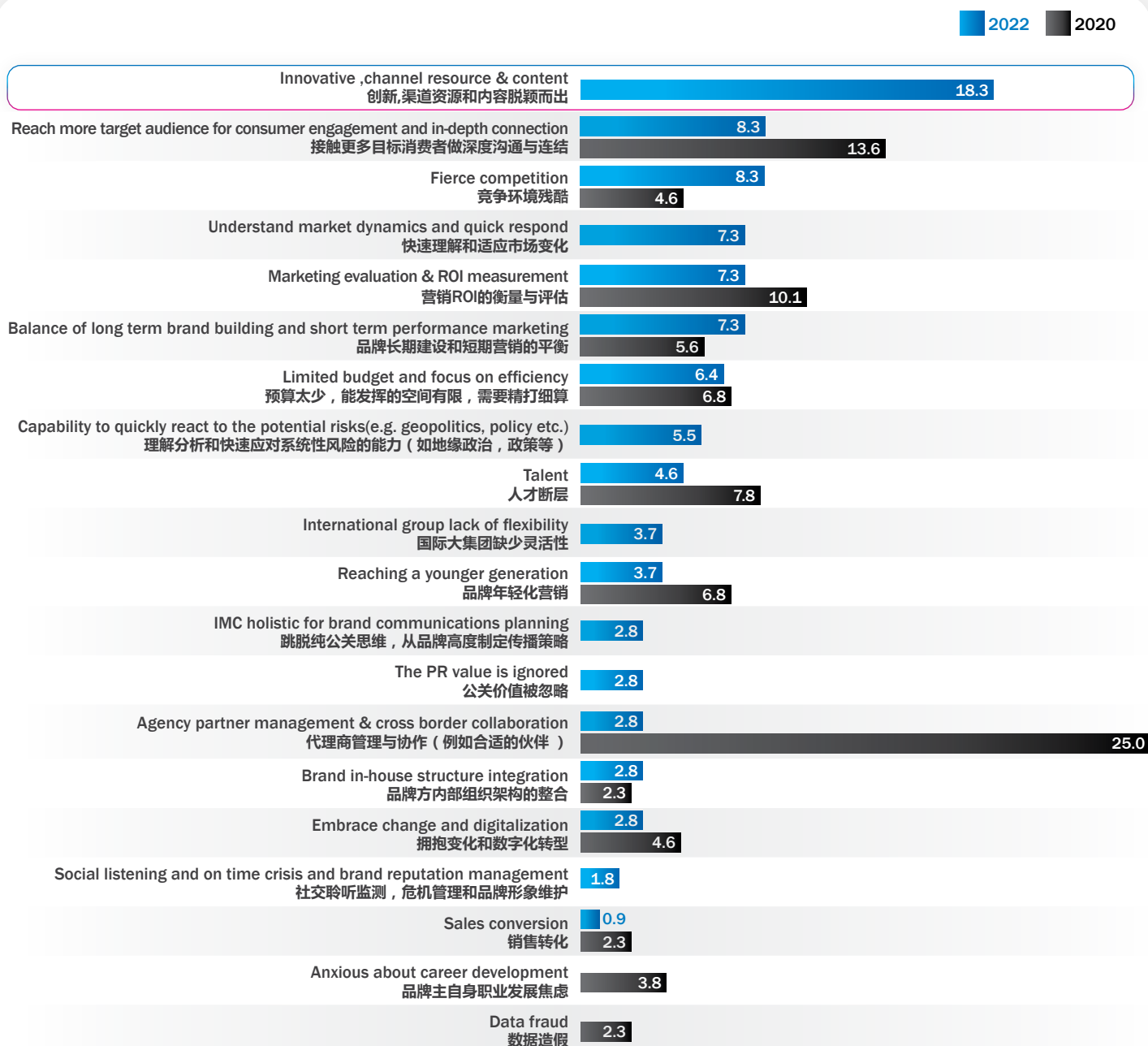
FINDING 10

Producing innovative content across channels that leads to business results will be the biggest challenge for China's marketers

对于品牌主来说，最大的挑战是跨渠道创新内容制作，并带来商业成果

What are the biggest challenges marketers will face in the future?

总体来说，您认为市场主面临的最大挑战是什么？



Note: Marketer Interviewed In 2022 (125), 2020 (121), Data in %.

ABOUT R3

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.



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 proprietary data pools 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.

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