



# WINNING AT ONLINE VIDEO IN CHINA

## 赢在中国在线视频

---

How to effectively navigate the online video  
industry in the Mainland market  
如何在中国大陆地区有效地驾驭在线视频

2014

**R3: 胜三**

# INTRODUCTION

## 介绍

---



**W**ith nearly 80% of China's netizen population now viewing online videos from multiple channels, marketers and their agencies are faced with the challenge of reevaluating where they put their marketing dollars and integrating content with newly emerging platforms and technologies.



**如**今有将近80%的中国网民正在通过多样的渠道浏览在线视频。因此，一项新的挑战 - 如何重新评估和分配营销预算以及将内容与前沿的平台和技术整合 - 正摆在广告主和广告公司面前。

This White Paper from marketing consultancy R3 is designed to give marketers and their agencies some insight into:

**WHO** are the key stakeholders in the online video industry ecosystem and what do they bring to the table?

**WHAT** are the trends and areas of growth in China's online video landscape?

**WHAT** does the future of cross-screen media look like?



This report is designed to start, rather than end a dialog. If you have your own views on this project, we welcome hearing about them at @r3ww, @r3jlb , @r3china  or via our contact page at [www.r3ww.com](http://www.r3ww.com)

本篇白皮书由营销咨询公司胜三提供，旨在向广告主以及广告公司分享以下洞察：

**在** 在线视频行业的生态系统中，谁是主要的参与者，他们能够为行业带来什么？

**在** 中国在线视频的蓝图中，增长的趋势和领域在哪里？

**跨** 屏媒体的未来在哪里？

本篇白皮书意在抛砖引玉，我们期待能得到您的回应并与您共同就此话题进行更深的讨论，您可以通过我们的推特账户 @r3ww, @r3jlb , 或微博账户 @r3china , 或者直接通过我们的官网联系 [www.r3ww.com](http://www.r3ww.com)

# METHODOLOGY

## 方法论

---



**T**his white paper provides an overview of the Chinese online video market, along with analysis of emerging trends among the key players in the industry. For this report, we drew from three sources:

### **R3 EN-SPIRE:**

Designed to help marketers and corporate asset managers establish the ROI of media investments, celebrity endorsements, and sponsorship activities, EN-SPIRE is a new research tool that analyzes the engagement and aspirations of Chinese consumers. The study measures brand preference, brand values, and brand engagement of Chinese consumers by tracking the popular culture trends in China.

### **CHINA DIGITAL MEDIA SURVEY:**

Conducted jointly by AdMaster and R3, the 2013 China Digital Media Survey reaches out to 280 Digital Marketing professionals from leading marketing firms across the country and across different industries. The report highlights the most up-to-date digital media and marketing trends and key issues facing marketers.

### **CHINA AGENCY SCOPE:**

Agency Scope is conducted via face-to-face interviews with China's top marketing decision makers working with creative, media, digital and marketing services agencies across China to cover key client-agency trends.

Because we do not rely on any one single data source, we believe that these forecasts give the most objective and independent view of the online video marketplace.

**本**篇白皮书覆盖了中国在线视频市场的总体行业概览，以及对行业内发生的前沿趋势的分析。本篇白皮书的内容主要来源于：

### **胜三 EN-SPIRE:**

旨在帮助市场主和企业营销资产管理经理提高媒介投放，明星代言，活动赞助的投资回报率。EN-SPIRE是一个全新的分析中国消费者消费意愿和参与度的研究模型。该研究通过对中国流行趋势的追踪来衡量消费者对于品牌的偏好度和参与度，以及品牌价值。

### **中国数字媒体营销调研：**

本调研由胜三和精硕科技合作开展。2013年中国数字媒体营销调研广泛联系中国地区大型广告主，邀请了280多位数字营销专业人士参与。本报告旨在提供给广告主最新的数字媒体资讯，市场趋势，以及他们正在面临的主要问题及解决方法。

### **中国营销趋势研究：**

通过对中国地区营销决策层进行面对面的采访，了解他们与创意，媒介，营销代理公司的合作关系，揭示广告主与代理商趋势。

我们不依赖单一数据资源，所以我们坚信这些预测能够为在线视频市场提供最客观和独立的观点。

# EXECUTIVE SUMMARY

## 执行总结

---



## **ONLINE VIDEO VIEWER COUNT REACHES 450 MILLION**

Reaching a count of 450 million, China's online video viewership now comprises nearly 80% of the mainland's netizen population. With the majority of consumers now accessing online video content through PCs, mobile, and tablets, viewership of traditional TV has dropped. Other factors, such as exclusive broadcasting agreements between popular programs and major online video portals, are also driving the need for further integration between traditional and online TV.

### **在线视频用户达到4.5亿**

目前中国在线视频浏览用户已达4.5亿，占到中国网民总数的80%。随着大多数消费者开始通过电脑，手机和平板电脑接触在线视频内容，传统电视的收视率受到影响。另外，各大主流视频网站纷纷与热播海外和本土电视剧签署独家播出协议，如乐视，搜狐和爱奇艺，也促进了传统电视和在线视频整合营销的趋势。

## **MASS INDUSTRY CONSOLIDATION THROUGH M&A**

As competition heightens among major platforms and costs rise for content licensing, the online video industry is going through a massive shake-up with notable moves such as the Youku-Tudou merge in 2012 and the PPS acquisition in by Baidu in 2013, recent M&As have significantly reshaped the online video landscape, providing fresh challenges as well as opportunities to marketers.

### **通过并购实现行业整合**

主流平台竞争日益加剧，用于购买内容的成本也不断提高，在线视频行业正在经历一场空前的变革。随着优酷与土豆于2012年合并，百度-爱奇艺收购PPS，在近两年发生的诸多媒体并购明显地重塑了在线视频市场，这同时也为市场主带来了全新的机遇和挑战。

## **ENTERING THE GOLDEN AGE OF OGC AND UGC**

With the increasing number of stipulations and regulations to which TV programs must adhere in order to get airtime, many online video platforms are now turning to owner-generated content (OGC) and user-generated content (UGC) to meet the demand for quality online content from China's viewers. As trends continue to shift away from traditional television, online video portals and marketers will have to take time to understand how OGC and UGC can fit into the bigger strategic picture.

## **OGC和UGC进入黄金时代**

随着针对传统电视节目的限令增多，同时也为了满足中国网民对节目内容的需要，很多在线视频平台将重心转移到自制节目（OGC）和用户原创节目（UGC）上。在传统电视的收视受到诸多因素影响的情况下，在线视频网站和市场主需要更多关注如何将OGC和UGC更好的服务于整体市场策略。

## **44% OF MARKETERS ALLOCATING BUDGET FOR CROSS-SCREEN OPTIMIZATION**

With 44% of marketers allocating budget for cross-screen optimization and evaluation, the rise of the multi-screen consumer market is showing no signs of slowing down. As new technologies such as Internet-enabled televisions begin to go mainstream, third-party monitoring companies and consultants will continue to push the envelope in the online video industry with new tools and solutions for multi-screen optimization and evaluation.

## **44%的广告主将跨屏优化列为预算分配考虑因素**

44%的广告主在进行预算分配时，开始考虑跨屏优化和评估。由此可见，多屏消费市场的崛起将不可避免。随着诸如互联网智能电视等新技术成为主流，第三方监测和咨询公司将会持续为在线视频行业的多屏优化和评估提供新的研究模型和方法。

# DETAILED FINDINGS

## 详细结果

---



# A SNAPSHOT OF THE CURRENT STATE OF CHINA'S ONLINE VIDEO MARKET

## 中国在线视频行业现状

As with each new development in the ad industry, allocating budget towards online video has been slow on the uptake but is quickly becoming a top priority on every marketer's agenda. Online video has not only played a strong role in driving the evolution of China's dynamic Internet landscape, it has also proven to have precise targeting while also achieving mass reach and engagement among China's consumers.

在近年广告行业的每一次发展中，广告主对于在线视频的关注从未达到如今的高度。在线视频不仅仅扮演拉动中国互联网市场变革的角色，它同时对精准投放，以及在消费者中获得理想到达率和参与度，都起到了重要的作用。

## THE ONLINE VIDEO INDUSTRY ECOSYSTEM

### 在线视频行业生态系统全景

Stakeholders in online video industry (including but not limited to):  
在线视频行业主要参与者（包括但不限于）：

Marketers 广告主

Target audiences/viewers 目标受众

Online video websites 在线视频网站

Ad agencies 广告代理公司

Third party monitors 第三方监测

Consultancies 咨询公司



So, what are the patterns and trends in the online video industry today?

今天，在线视频行业的模式和趋势又是什么？

# ENGAGING VIEWERS WITH THE CALIBER OF CONTENT

## 资源为王，内容为王，抢占 独播资源，抢夺消费者关注

- + Sohu TV has been the most aggressive of Chinese online video portals in acquiring broadcasting rights to American TV programs. In 2010, it was the first to stream the hit show, “Lost”, to audiences in China. Since then, it has obtained exclusive rights to several other Emmy Award-winning programs including “House of Cards” and “Big Bang Theory”, all of which have reached exceptionally high viewership rates.
- + 搜狐视频：2010年2月，搜狐视频首家引进正版美剧《迷失》第六季，并与美国同步播放。搜狐累计引进的美剧名列各视频网站之首。2013年连续引入《纸牌屋》、《生活大爆炸》，以及其他多部艾美奖获奖剧集，都获得了极高的收视。
- + Following its success in 2012 as the exclusive online broadcast channel for the popular Chinese drama, The Legend of Zhen Huan, LeTV has kept its sights on hot local TV programs. In 2013, the online portal invested 100 million RMB in a bid for Season Two of hit reality show, “I am a Singer”. LeTV then sold an official online sponsorship title to Chinese e-tailer, VIPshop.com, who used it to launch an online campaign under the theme of “I am a Shopper”.
- + 乐视：继2012年独播《甄嬛传》，点击率创造历史新高后，在2013年11月，乐视又以1亿左右价格获得湖南卫视《我是歌手》第二季独家网络版权；与此同时，唯品会以千万级别赞助费从乐视获得《我是歌手》网络冠名权，并将同期在唯品会电商平台上推出《我是买手》活动。
- + In November 2013, Tencent won the exclusive online broadcasting rights to the third season of “The Voice of China” and the fifth season of “China’s Got Talent”.
- + 腾讯视频：在2013年11月，获得《中国好声音》第三季和《中国达人秀》第五季独家网络版权。
- + Surpassing the precedent set by Tencent, iQiyi and PPS forked over 200 million RMB to gain rights to “Where Are We Going, Dad?”, along with four other Hunan Satellite TV shows. Within a few weeks, China food and beverages company Yinlu Group set a new record by claiming exclusive naming rights of the network broadcast programs from iQiyi with 66 million RMB.
- + 爱奇艺和PPS：在2013年12月，以2亿价格获得《爸爸去哪儿》等五档湖南卫视综艺节目的网络独播权。其中，《爸爸去哪儿》爱奇艺网络独家冠名权，在几周之内，被银鹭集团以6600万拿下，创下中国季播节目网络独家冠名费的新纪录。
- + Also in November 2013, PPTV announced a two year partnership agreement with Jiangsu Satellite TV, which would allow PPTV to acquire exclusive online broadcasting rights to the network’s entire channel content.
- + PPTV：在2013年11月宣布了与江苏卫视为期两年的战略合作，PPTV从2014年开始独家播出江苏卫视旗下所有节目。

# ONLINE VIDEO PLAYERS JOINING FORCES THROUGH M&AS

## 资本整合、资源互补， 视频行业巨头垄断格局呈现

- + In 2012, Youku and Tudou announced a merger, ending the intense rivalry between the two online video sites to form China's biggest online video portal, Youku Tudou Inc.
- + 优酷+土豆：2012年3月，优酷、土豆共同宣布以100%换股的方式合并，成为2012年度以及中国在线视频行业最大并购案。
- + In July 2012, the P2P online video streaming company Funshion partnered with Shanghai Media Group's (SMG) BesTV. In August 2013, BesTV invested more into the partnership, seeking to deepen the cooperation through joint technology sharing and content production.
- + 风行+百视通：2012年7月，风行网宣布获得上海东方传媒集团(SMG)控股新媒体上市公司百视通战略投资；2013年8月，百事通再次增资风行网。SMG百视通下属东方卫视自制节目和电视剧可以直接同步风行网，风行网也从节目开播初期就参与制播和线下推广。
- + Finally, in May 2013, Baidu announced the acquisition of PPS, peer-to-peer streaming video network software. Following the acquisition, PPS operates as a sub-brand under iQiyi, complementing each other through streaming content online.
- + 百度爱奇艺+PPS：2013年5月，百度宣布收购PPS视频业务，并将其与爱奇艺进行合并；爱奇艺与PPS的组合，形成了页面端+客户端的资源互补。

# THE RISE OF A MULTI-SCREEN CONSUMER MARKET

## 抢占多屏消费市场

- + In May 2013, LeTV announced the launch of a "Super TV" in collaboration with Innovation Works, Qualcomm, Foxconn, and Sharp. The new launch enables viewers to have an uninterrupted viewing experience and seamless switching between television and PC.
- + 乐视超级电视：2013年5月，乐视联合供应商夏普、美国高通、富士康和播控平台合作方CNTV，发布乐视超级电视，正式涉足硬件进军客厅，尝试电脑与电视间视频流畅播放体验。
- + Starting a cross-screen experiment between PC and mobile applications, PPTV expanded to include televisions in May 2013. The Internet TV set-top boxes, called 'PPBOX', enable video content to be transmitted between mobile and TV in Wi-Fi environments with PPTV-enabled devices.
- + PPTV：2013年5月，PPTV聚力推出互联网电视机顶盒PPBOX，打通手机、平板电脑与电视的直线对接，可将移动端视频内容直接推送到电视上播放，手机等移动端甚至可被作为可视化电视遥控器使用。

+ Launched in July 2013, iQiyi Green Tail was claimed as the first cloud technology of its kind in China. Rather than manually searching the same content repeatedly, users can rely on their saved user habits to link preferences across mobile phones, PCs, and laptops.

+ In December 2013, Youku Tudou Inc. and Coship reached a cooperation agreement on new over-the-top (OTT) TV content services so that Coship OTT services would be available exclusively through Youku Tudou channels. Targeted advertisement and rating surveys specifically adapted for OTT TV are now underway as well.

+ 爱奇艺绿尾巴：2013年7月，爱奇艺发布了国内第一款云端内容传输互动技术“绿尾巴”，使之能够建立手机与电脑，平板电脑以及其他手机的设备配对，并在设备之间进行视频内容传输。绿尾巴技术，或将使视频用户交互习惯，转向依靠设备之间的硬件互动，而非在不同设备间手动多次重复搜索相同内容。

+ OTT TV：2013年12月，优酷土豆与同洲电子达成合作协议，同洲“OTT TV”终端上的电视内容将与优酷土豆视频资源实现独家关联。相应的目标人群广告精准投放，以及适用于互联网电视的收视率监测，也被提上日程。

# COMPETITION TO TRADITIONAL TV WITH OWNED GENERATED CONTENT (OGC)

## 创建自身核心价值，推出独家自制节目，吸引广告主直接投资

### + SINA SPORTS & UNILEVER CLEAR:

In 2013, Unilever collaborated with Sina Sports Channel to create two original video series for its hair care brand, Clear. Through “Clear Football Victory” and “Clear Buzzer Beaters”, the brand was able to step out of traditional advertising to engage young Chinese males through digital branded content and entertainment.

### + YOUKU & INFINITI:

Another brand to seeking to experiment and innovate in the area of content marketing is Japanese luxury vehicle, Infiniti. Having identified matching values and tonality in Youku’s popular online talk show, “Morning Call”, Infiniti signed on as a main sponsor of the program in January 2014.

Created in 2012, “Morning Call” is a successful example of original content created by an online media owner that has surpassed traditional TV in terms of viewership.

### + 新浪体育视频频道与联合利华共建《绝杀时刻》：

2013年，新浪体育为联合利华旗下的清扬品牌量身定制视频系列《胜利足球》、《绝杀时刻》。双方将这一整合了体育视频节目的营销方案当作一个产品而非传统单纯的广告来看待，通过不断的磨合沟通，抛弃了过往的产品信息硬性植入方式，代之以品牌价值理念的融入。

### + 英菲尼迪、优酷与《晓说》：

2014年1月，英菲尼迪宣布正式成为优酷网自制脱口秀节目《晓说》的首席赞助伙伴，探索内容营销的新方式。始于2012年的网络脱口秀节目《晓说》，是视频网站自制节目逆袭一线卫视节目的代表。基于共同的价值追求和品牌调性，英菲尼迪与《晓说》将展开包括“敢爱语录”提炼、“敢·爱”话题植入等一系列深度内容营销合作。

# USER GENERATED CONTENT

## 不断强化与消费者互动， 开发新型盈利模式

Online reality shows have taken off in 2013 within the user-generated content (UGC) world- with sites such as Six Rooms, guagua.cn, and woxiu.56 having profited greatly from the UGC wave. In 2014, Baidu and Youku Tudou Inc. plan to take steps toward clarifying their strategy for online reality shows. Up until now, the online reality show industry relies heavily upon value-added services- but whether or not marketers will find online reality shows to be suitable for ads is still up in the air.

2013年，用户原创内容(UGC)中，在线秀场尤其吸引关注，成为在线视频行业盈利的亮点。六间房、呱呱视频、56网旗下“我秀”等在线秀场，已取得了不凡盈利业绩。2014年，可以预见百度、优酷土豆的在线秀场业务将更加明朗化。只是以“我秀”为代表的UGC用户原创视频，现阶段商业模式更依赖于增值服务业务盈利，其内容编辑环境对大型广告主投放是否合适，还有待观察。

# TRENDS AMONG KEY INFLUENCERS

## 在线视频行业其他 参与者整体发展状况

Though video sites provide the base platform of the online video category, the whole entire ecosystem between engaged viewers, marketers, third-party monitors, and consultancies comprise the core of the industry.

视频网站作为在线视频行业的主体，在整个行业的发展过程中起到了非常关键的作用，但同时，我们需要看到的是，在整个产业链中，消费者的参与、广告主的投入、以及代理商及第三方公司的推动，才是真正促进行业发展的核心。

# INCREASED USER SCALE AMONG CONSUMERS

## 消费者：用户规模和使用时长持续上升

- According to statistics released by CNNIC, online video audience scale reached a count of more than 450 million, accounting for 80% of all internet users in China by September 2013. As expected, a larger number of new-generation audiences are more inclined to rely on the internet over traditional TV to watch video content.
- 根据CNNIC的相关数据显示，截至2013年9月底，在线视频网民达到4.5亿，整体网民中收看在线视频的比例为80%。其中年轻人群，越来越依赖互联网、而非传统电视来收看视频内容。
- According to the 2013 Q3 China Online Video Monitoring Report published by iResearch, online video users on mobile apps doubled in a year's time to reach 150 million by August 2013.
- 根据艾瑞《2013 Q3中国在线视频行业季度监测报告》显示，在线视频PC端网页与PC客户端的月度覆盖人数分别为4.5亿人和3.2亿人，环比增长分别为0.2%和0.6%；2013年8月，在线视频移动端用户规模达到1.5亿，较2012年同期增长一倍。

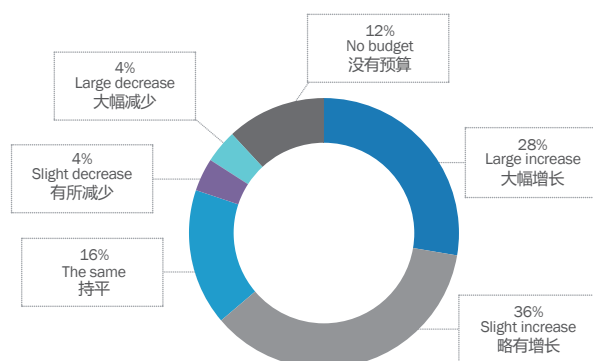
# GROWING TRUST AND PREFERENCE AMONG MARKETERS

## 广告主：信任度和偏好度持续增加

- According to the 2013 China Digital Media Survey jointly published by R3 and AdMaster, 64% of marketers have stated that they will increase their budget for online videos, with 28% of marketers planning a 'large increase':

根据胜三与精硕科技于2013年联合对外发布的《2013中国地区数字媒体营销调研报告》显示，64%的受访广告主表示会在2013年增加在线视频广告的投放量，其中有28%的受访广告主表示会大幅增加。

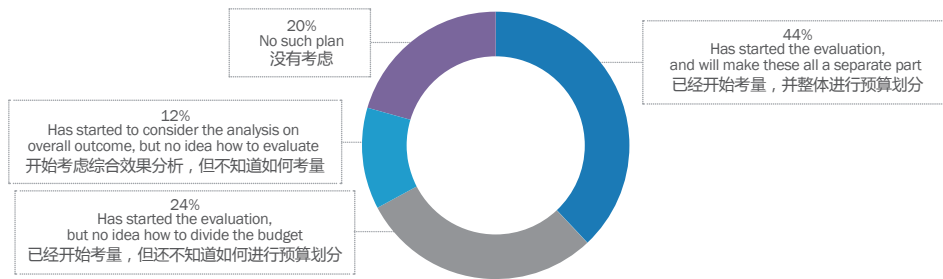
### VIDEOS 视频广告



IMPROVING THE EFFECTIVENESS  
& EFFICIENCY OF MARKETERS  
& THEIR AGENCIES

- + Specifically, 44% of marketers have already allocated budget for cross-screen optimization and evaluation, while a further 36% of marketers consider it to be high on the agenda.

特别而言，44%的受访广告主已经开始对电视媒体、在线视频和移动视频等多方跨屏媒体的营销效果进行综合的分析，并将所有视频媒体归为一个整体进行广告预算的分配。



- + Results from R3's biennial tracking study, China Agency Scope, also indicates a rising trend for marketer confidence and preference in the online video category.

胜三正在进行、并即将于2014年3月出版的《2014年中国营销趋势研究》的相关调研结果，显示了同样的趋势。广告主对数字媒体营销，特别是在线视频营销，表现出了更多信任和倾向。这与近期的市场反馈，不谋而合。

# DEVELOPMENT OF ONLINE VIDEO OPTIMIZATION TOOLS AND EXPERT TEAMS AMONG AD AGENCIES

## 广告代理商：建立在线视频与跨屏优化工具和团队

- + Most major 4A agencies have established online video and cross-screen teams, while also implementing new tools for optimization and distribution.

在在线视频不断发展，以及多屏投放趋势明显的情况下，各大4A代理商都纷纷建立起在线视频与跨屏的团队，推出各自的优化与分配工具。

- + In the meantime, local agencies are taking advantage of their localized expertise of technology by leveraging Real Time Biding (RTB) trends to develop proprietary online video ad optimization platforms.

同时，以技术见长的各本土代理商，利用其技术优势，结合实时竞价（RTB）等趋势，开发了在线视频广告优化投放的自有平台系统。

# IMPROVED DATA AND CONTINUOUS INSIGHT PROVIDED BY THIRD-PARTY COMPANIES

## 第三方公司：完善数据，持续洞察

- + Third-party monitoring companies have played a key role in boosting the effectiveness of ads and continuously improving standards for the online video industry at large through monitoring technology.

第三方监测与优化公司，也顺应发展趋势，共同完善行业标准，并不断提高自身的监测技术，解决同源数据难题，保证营销的效果。

- + Third-party research and consulting firms have also provided valuable insights on the dynamic online video industry for all stakeholders.

第三方调研和咨询公司，也都时刻关注行业的发展，不断推出总结和前瞻性的研究报告，为各方提供参考。

In the past, online video, especially high-definition online video, was restricted by bandwidth limit. With the arrival of fourth-generation (4G) mobile networks, the faster download speed and increased reliability of mobile devices, the online user experience is expected to improve with access to richer content and service innovations. The diversified online landscape will be better positioned to deliver greater marketing value and a wider range of options for marketers.

我们可以看到，在线视频播放，特别是在线高清视频播放，一直受到网速带宽的限制，这一点，在移动端尤其明显。经过几年的基础筹备，2013年12月，中国三大移动运营商获得了4G牌照。虽然4G网络在覆盖面、资费和服务等方面将如何具体实施还有待观察，但移动上网速度和稳定性的提升，却必是无可争辩的行业远景。与此对应的是，更丰富的视频内容、服务创新将有条件被大规模使用；以及随之而来，广告主将面临更多样、更有价值的选择可能性。

# INNOVATING THE FUTURE OF CROSS-SCREEN MEDIA

## 跨屏时代的到来

The traditional concept of the 'prime time' slot has changed significantly now that cross-platforms have enabled content to always be on-screen. Although the topic of cross-screen media has been exhausted, multi-screens will continue to dominate every facet of the consumer experience in 2014, and certainly reshape the ad industry online.

电视、电脑、手机、平板、公交、地铁、楼宇LCD..... 屏幕不再限于电视机前的黄金时间段，多屏应用已经渗透到我们生活的方方面面时时刻刻，并快速更新重塑着视频广告行业。

虽然多屏概念已是老生常谈，但2014年多屏融合仍将势不可挡，以下我们将就体现于行业生态各方的趋势进行详细介绍。

## 1 INTEGRATION ACROSS PLATFORMS AND NEWLY EMERGING TECHNOLOGIES

### 视频网站

With the rapid development of the category in recent years, major online video companies have amassed huge numbers in audiences, diverse content material, and valuable data. Thus, cross-screen integration has come to a point that it is no longer limited to software compatibility or content sharing, but can now be seamlessly integrated among most platforms such as PCs, mobile phones, and tablets. In 2013, more integrated hardware products such as internet-enabled televisions were released.

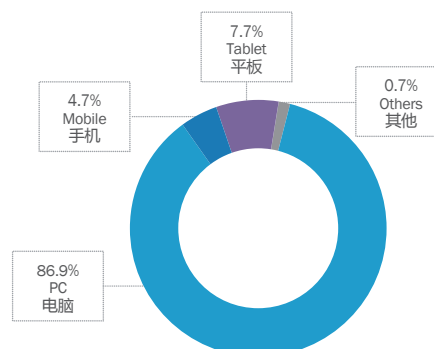
如前文所述，经过近年来的飞速发展，视频网站已积累庞大的收视群体、多元化的内容素材、以及在线播放后台数据的信息积累。

各大视频网站也已经完成布局，抢占网页端、客户端、移动端甚至客厅端，为多屏的实现提供了基础。

# 2 WIDENING CHOICES FOR END USERS 消费者

Today, consumers are accessing online video through multiple platforms. According to R3's latest wave of En-spire data, the breakdown of platform usage to access online video is as follows:

如今，消费者们已经可以在不同端接触到在线视频；根据胜三最新En-spire调研数据，消费者接触在线视频的途径比例如下图：



# 3 MARKETER CAMPAIGN CASE STUDIES 广告主

Many marketers are already adopting cross-screen strategies in order to increase the effectiveness of their campaigns.

广告主也积极迎合发展趋势，不断优化跨屏营销的效果：

## + P&G AND IQIYI: "CHINESE HERO" :

In 2013, Henan Satellite TV and iQiyi jointly produced an original reality competition show called the "Hero of Chinese Characters". The program, which featured elementary to middle school students competing in the Chinese equivalent of a spelling bee quickly became a summer hit. iQiyi then developed a mobile application whereby viewers could, on top of watching the video on TV and through online streaming, interact with the program in real-time using mobile devices. The program's cross-screen reach quickly attracted marketing dollars from P&G's Safeguard, who signed on as a sponsor and placed a huge media order to advertise across all platforms.

## + MENGNIU'S CROSS-SCREEN EVALUATION SYSTEM :

In a 2013 campaign, Mengniu developed a system enabling the evaluation of media delivery across multiple touch points. Leveraging television, online video, and LCD screens, Mengniu used data from the three-screen approach to track the video consumption of the target audience. As a result, the leading dairy brand was able to evaluate and reallocate their media costs to improve return on investment.

## + 宝洁、爱奇艺与《汉字英雄》：

2013年，网台联动大型节目《汉字英雄》，由河南卫视和爱奇艺共同摄制播出。由爱奇艺开发的节目同名手机客户端，因与节目的及时互动，成功开创多屏时代的电视、互联网、移动端全新联动模式。宝洁公司旗下品牌舒肤佳在节目播出的河南卫视、爱奇艺、PPS三大平台，进行包含电视屏、PC屏及手机、平板电脑等移动屏的全媒体投放。

## + 蒙牛同源数据下三屏优化：

在碎片化的传播环境下，蒙牛作为业界领先的广告主，已形成一套基于数据整合的科学的媒介投放及评估系统。继2012年实现电视与在线视频的双屏数据整合后，2013年又增加了LCD屏。通过三屏投放创新性的数据整合，以目标消费者的视频消费轨迹为主线，全方位触及不同消费者，提高媒介费用的投资效率。蒙牛品牌创新性的营销尝试和丰富的实战经验，相信对行业多屏整合传播的发展，一定大有裨益。

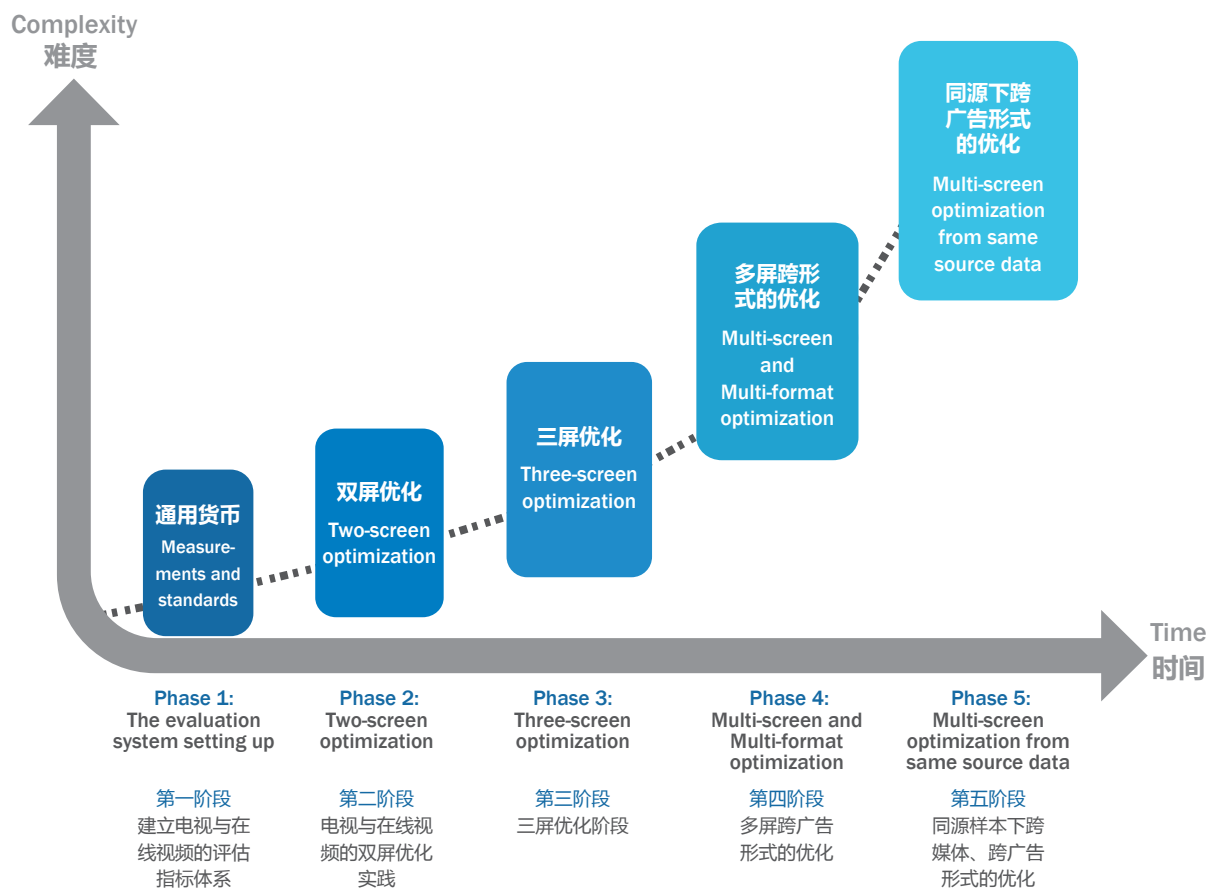
IMPROVING THE EFFECTIVENESS  
& EFFICIENCY OF MARKETERS  
& THEIR AGENCIES

# 4 VALUE-ADDED BY THIRD PARTY MONITORING CONSULTANTS

## 监测公司

Cross-screen optimization can be broken down into a few steps- from the development of monitoring techniques to optimization best practices. The most important factors affecting the data are accuracy and optimization when it comes to facing issues such as homologous data. The development of cross-screen optimization can be defined by the five stages below.

跨屏的优化可以划分为如下五个阶段，经过监测技术和优化理论的发展，监测公司目前已经可以实现三屏甚至多屏的监测优化。同时，对于影响数据准确和优化效果的最重要因素——同源数据的问题，监测公司也已经开始了实质的研究。数据监测公司精硕科技先后联合乐视和PPTV发布了跨屏优化研究报告，分别聚焦于多屏优化和同源数据的研究。



# MOVING FORWARD IN THE EVOLVING MARKETPLACE OF ONLINE VIDEO

## 结语

---

In 2012 and 2013, we saw several innovations in content, technology, and a shifting ecosystem reform the online video industry. We are now participating in and witnessing an unprecedented pace for online video.

In 2014, the online ecosystem is evolving faster than ever- and we foresee both short-term risks, and a long-term payoff. Though new technologies and partnerships are opening up online video viewing options closer to viewer fingertips, the profitability of China's online video industry will widely depend upon Chinese consumer values and preferences held towards online content.

2012年和2013年，在线视频在内容、技术、行业结构等方面都有了长足进展，而这将对整个行业未来的发展有持续影响。

2014年，在线视频行业的影响和变迁将更为显著。在前所未有的快速变化环境中，机遇与挑战并重，我们都将是参与者与见证者。

# GLOSSARY

## 词汇表

---

- 4G:** 4G is the fourth generation of mobile telecommunications technology that offers faster and higher quality multimedia streaming with the transfer speed up to 100Mbps. The standard adopted in China now is LTE-Advanced.
- 4G:** 第四代移动通信技术，可实现每秒钟100兆比特的传输速率。中国采用LTE-Advanced标准。
- Multi/Cross Screen:** Advertising that is customized by the context of the different screens that consumers use to access content, from TV, PCs, consoles, tablets to mobile devices.
- 多屏/跨屏:** 通过在电视、电脑、手机、LCD等多种视频媒体展现形式上进行广告投放，并对广告效果进行整合评估。
- OGC:** Owner-Generated Content refers to original content developed and produced by online video media owners.
- 自制节目 ( OGC ):** 由视频网站自己自作的影视作品。
- PGC:** Professionally-Generated Content refers to media content produced by professionals.
- 合作节目(PGC):** 由专业正规的影视制作公司制作的影视节目，由在线视频网站引进。
- UGC:** User-Generated Content is the term used to describe any form of media content, from videos to digital images, created and uploaded by end-users of a website.
- 用户原创(UGC):** 由个人用户自己创作并上传分享的视频内容。



# ABOUT US 关于我们

## RETURN ON INVESTMENT

We lead consulting and benchmarking of individual companies' marketing data, processes and people, to drive continuous improvement and greater accountability.

## RETURN ON MEDIA

We offer professional analysis of the media process, planning and buying with proprietary benchmarks and tools to set and measure performance.



## AGENCY RELATIONSHIPS

We help evaluate and improve agency relationships as a third party using an R3 proprietary online tool and process, along with our consulting skills.

## RETURN ON ASSETS

We invest in research on sports, celebrities and pre and post campaign tracking to validate marketing performance independently.

## AGENCY REMUNERATION

We analyze agency process and compensation in detail, and help to establish incentive and fee-based compensation structures, using our benchmarks from 40 countries.

## AGENCY REVIEW

We assist in identifying, reviewing and compensating the best possible agency, be it a creative, media CRM, BTL, PR, or interactive agency.

## OUR CLIENTS

We are retained by eight of the top twenty marketers across 50+ markets on six continents





New York

---

Shanghai

---

London

---

Sao Paulo

---

Chicago

---

Singapore

---

Beijing

---