



China National Resident Survey

Media & Consumption Behaviour Research, CTR

May,2016

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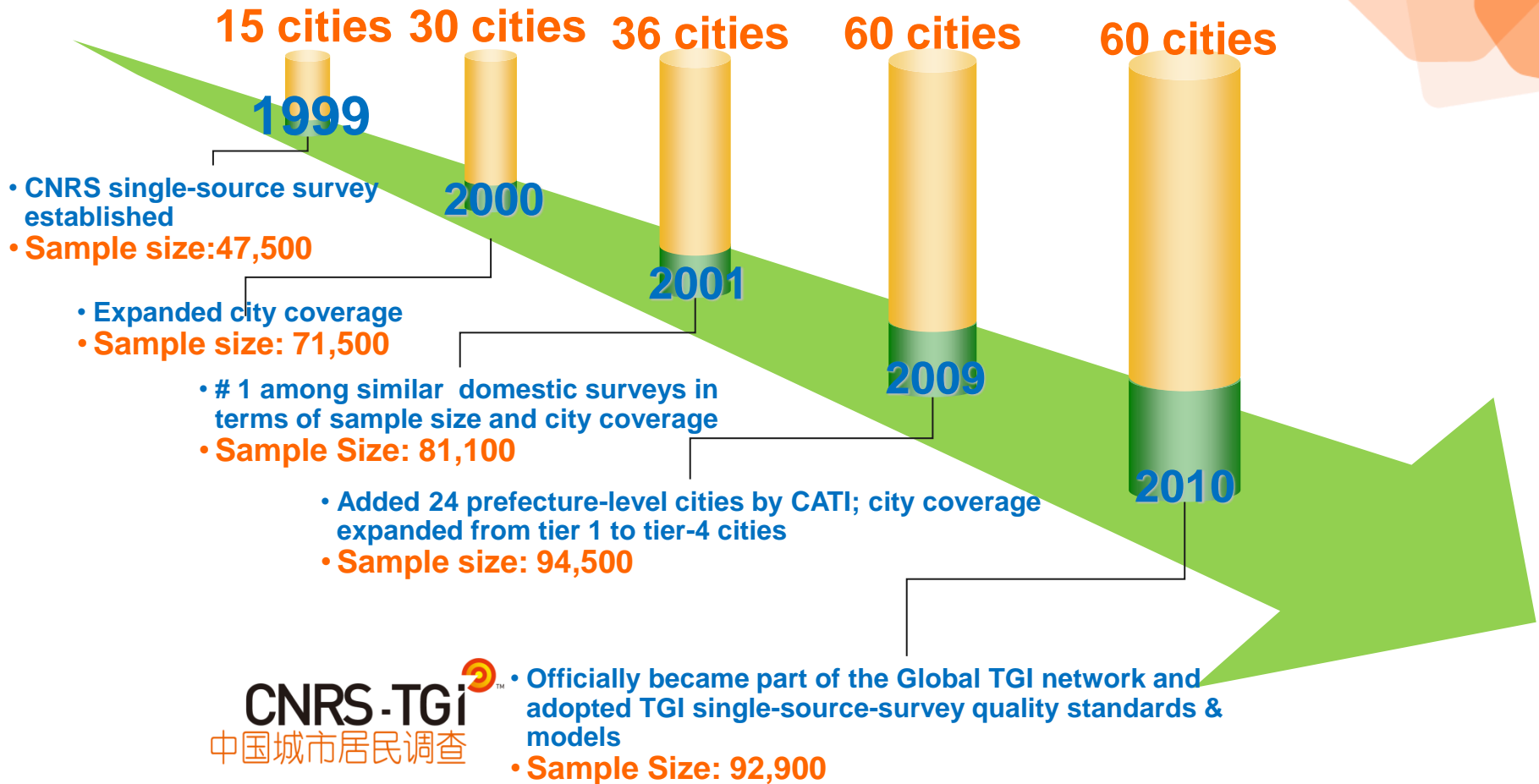
- ⇒ **CNRS-TGI Introduction**
- ⇒ CNRS-TGI Research Design
- ⇒ Quality Control
- ⇒ CNRS-TGI Data Values
- ⇒ Our Clients and Support Services

CNRS-TGI CNRS is the Largest National Continuous Survey of Urban Residents in China

CNRS-TGI²™ China National Resident Survey 中国城市居民调查

- CNRS-TGI²™ is a single-source continuous survey which provides consumers' product/brand usage, media habits and lifestyles of **China tier 1- 4 urban residents aged 15 to 69**.
- CNRS-TGI²™ was introduced into China market in 1999 based on international standards and keeps tracking the consumption behavior and lifestyles of Chinese consumers over 15 years. It has provided effective support to brand owners, media agencies and media owners on the **brand/media strategies making**.

CNRS-TGI is one of Global TGI network



TGI: With over 40 years Experiences on Single Source Surveys

TGI = Target Group Index

**Established by BMRB
in UK in 1969**

It's all about consumers

- Helps clients find their core target consumers and provide communication solutions

It's a huge database

- 700,000 interviews per year globally and projects the consumption behavior of over a billion population

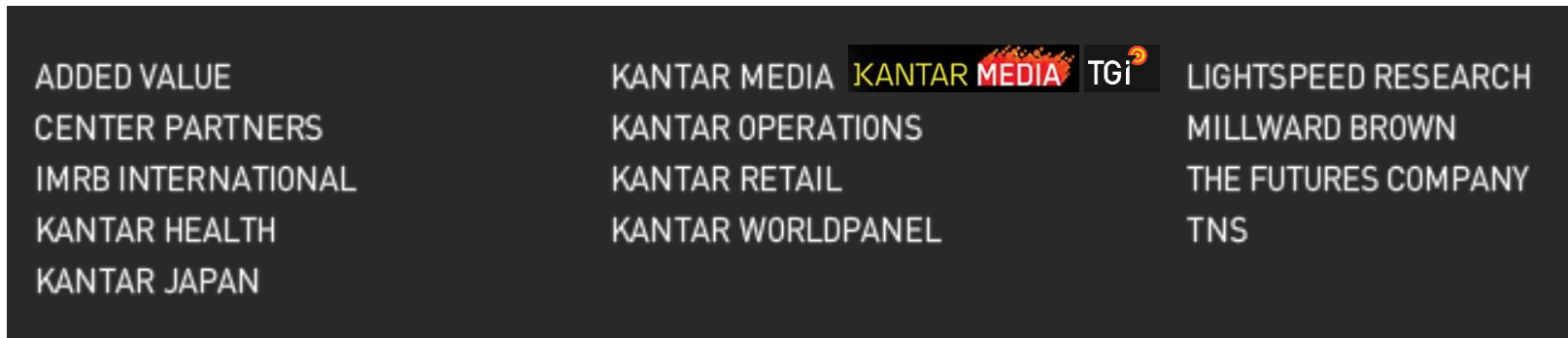
It's a Research System and Integrated Service

- Single source survey that provides insights on consumer preferences and identify advertising opportunities
- Helps clients conduct data mining by providing a series of services and data application training

TGI is Part of Kantar Media

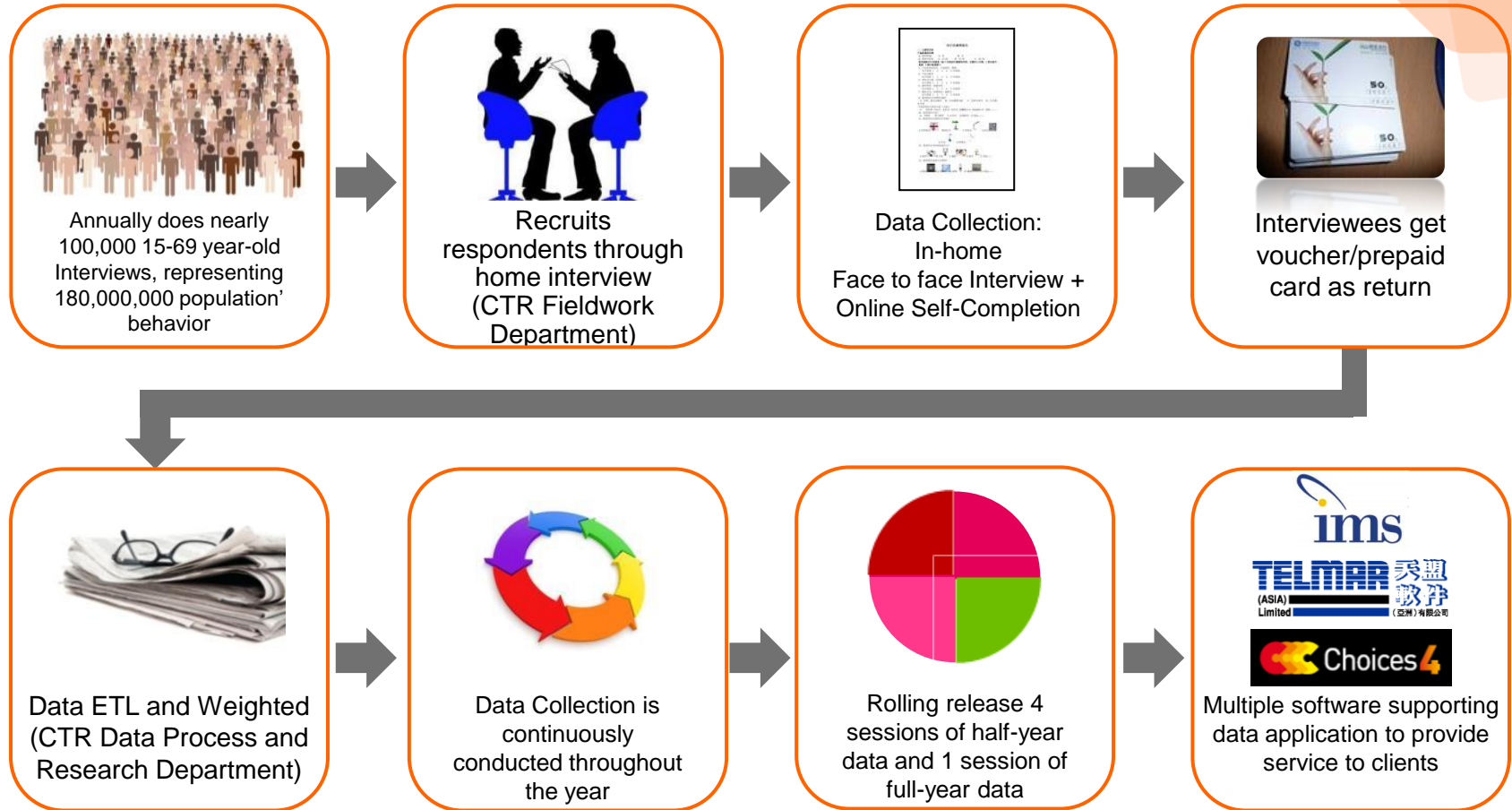


- One of the world's largest research, analysis and consulting networks
- 160 offices in 60 countries globally
- Owned by WPP

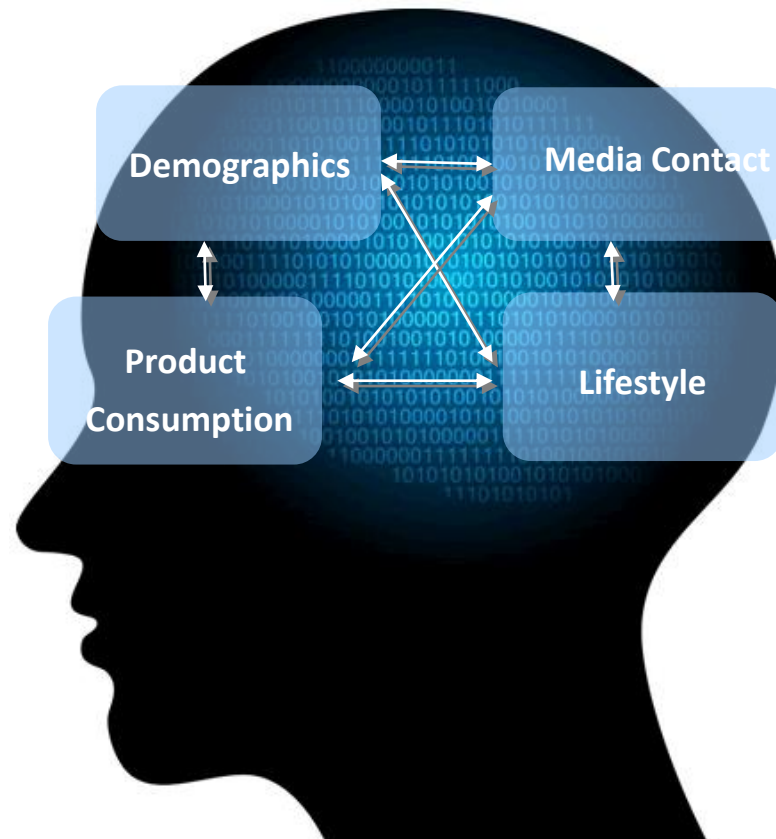


- Kantar Media is Kantar's specialized media research company
- One of the biggest multi-media research groups
- Kantar Media consists of 4 main areas of business: Kantar Media Intelligence, Kantar Media Audiences, Kantar Media TGI and Kantar Media Custom. Kantar Media provides global clients with multi-media monitoring, survey and consulting services through ad monitoring, consumer study, target group research and consumption research

CNRS-TGI Methodology: Systematic and Scientific Research and Fieldwork Working System



The CNRS-TGI USP: Single Source Survey That Provides 360° of Target Consumers



**Cross Analysis Can be Worked Out
Among Any Types of Information**

CNRS-TGI Demographic Information

(From the angle of demographic statistics, consumption structure and power)

Consumption Structure

General Info. Working Status Household Structure Decision-Maker



Personal/Family
Monthly Income

Personal Expenditure

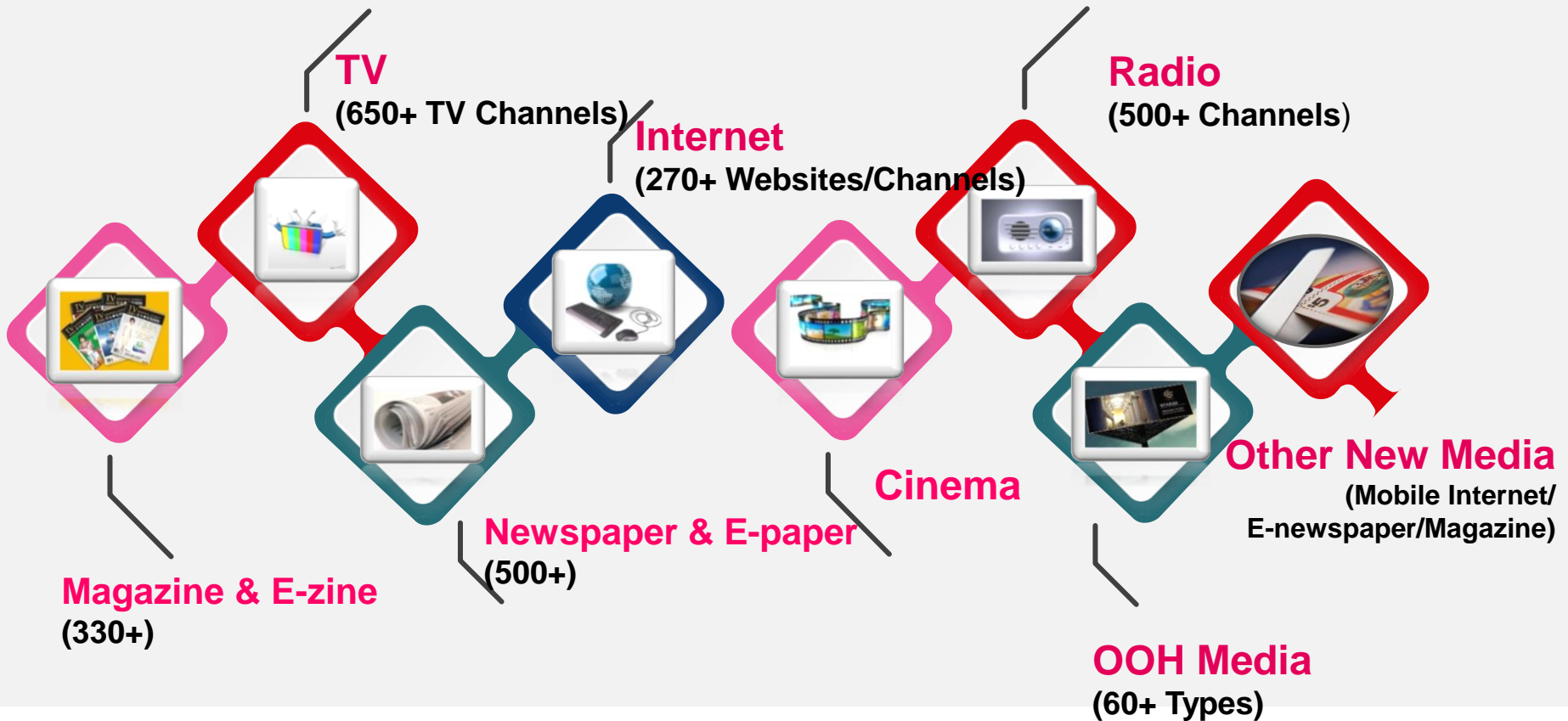
Family Expenditure

Housing

Consumption Power

Media Contact in CNRS-TGI

(Comprehensive study on all media types plus Mobile Internet so that the in-depth comparisons across media can be realized)



CNRS-TGI Media Indicators

- **Media Breadth**
(Media Reach/Audience)
- **Media Involvement**
(Time Spent/Contact Frequency)
- **Media Spread Ratio**
(Audience Spread Ratio)
- **Media Life Cycle**
(Year-Cross Comparison)
- **Characteristics**
(Age, Education, etc.)
- **Other Media Contact Behavior**
(Contact Location/Resource, Exclusive/
Duplicated Audience, Content/Program
Interest/Preference)

Quantitative

1

2 Qualitative

- Definition on **Media Role** (This Media helps in killing time; I enjoy reading magazine ads; I can't live without TV; When I need info. the first place I look is the internet.)
- Media Support on **Brand Preference** (Brands advertised in this media leave good impression)
- Media Lifts in **Brand Reliability** (It is a media with reliable information)
- Media **Boosts** in **Sales** (Media can increase my purchase intention)

Cross Media Comparison



- **Media Touch Point** (Added in 2014)
(Contacted/Most Attractive/Influential to
Purchase Decision/ Involve 16 Product
Categories)
- **Media Ad Effect**
(Newspaper Concerned/Magazine Ads
Contents/Online Ad Pattern Concerned/Ad
Tolerance)
- **Product Info. Channels**
(Involve 6 Product
Categories/Automobile/IT Digital/Household
Electronic Appliance/Small Electronic
Appliance/Video and Daily Goods/Fashion)

3

Media Touch Point / Ad
Effect

Internet and Mobile Internet in CNRS-TGI



220+ Product Categories and 6,000+ Brands

(Rich product and brand content for market, brand & competitive analysis)

Food and Beverage – 64 Categories



- Grain & Condiments (31 Categories)
- Instant Food (3 Categories)
- Snack Food (9 Categories)
- Dairy (8 Categories)
- Infant Food (2 Categories)
- Non-Alcohol Drinks (9 Categories)
- Alcohol Drinks (10 Categories)

Daily Goods – 72 Categories



- Personal Daily Consuming Goods(18 Categories)
- Male Product(4 Sub-categories)
- Female product(28 Categories)
- Infant and child product (4 Categories)
- Daily Household Goods(18 Categories)

Durable Goods – 38 Categories



- Household Appliances(5 Categories)
- Kitchen/Bathroom Appliance (3 Categories)
- IT/digital Product (11 Categories)
- Other Durable Goods (19 Categories)
- Automobile and Related Products (3 Categories)

Medicine & Health Supp.–38 Categ.



- Medicine (11 Categories)
- Health Supplements (10 Categories)
- Infant/Child Medicine(3 Categories)

Clothing and Access.– 14 Categories



- Fashion Dress(6 Categories)
- Sport Shoes(1 Category)
- Jewelry & Watch (7 Categories)

Service and Others – 13 Categories



- Finance Activity(11 Categories)
- Housing Decoration (2 Categories)

CNRS-TGI Product Indicator



FMCG

(Food, Drink and Daily Goods)

- Product Penetration
- Product Consumption
- Consuming Frequency
- CDI
- Concentration Ratio
- Concentration Curve
- Consumer Taste and Type

Durable Goods

(Household Electronic Appliance/
IT Digital Products and Automobile)

- Product Ownership
- Purchase Intention
- CDI
- Concentration Ratio
- Concentration Curve
- Factor Considered in Purchasing
- Product Info. Channels

Other Products

(Medicine & Health Supplement;
Clothing and Accessories)

- Product Purchase
- Product Consumption
- Consuming Frequency
- BDI
- Concentration Ratio
- Concentration Curve
- Product Info. Channels

Market Analysis

- Market Demands
- Industry Development level
- Industry Competition
- Product Consumption U&A

Brand Analysis

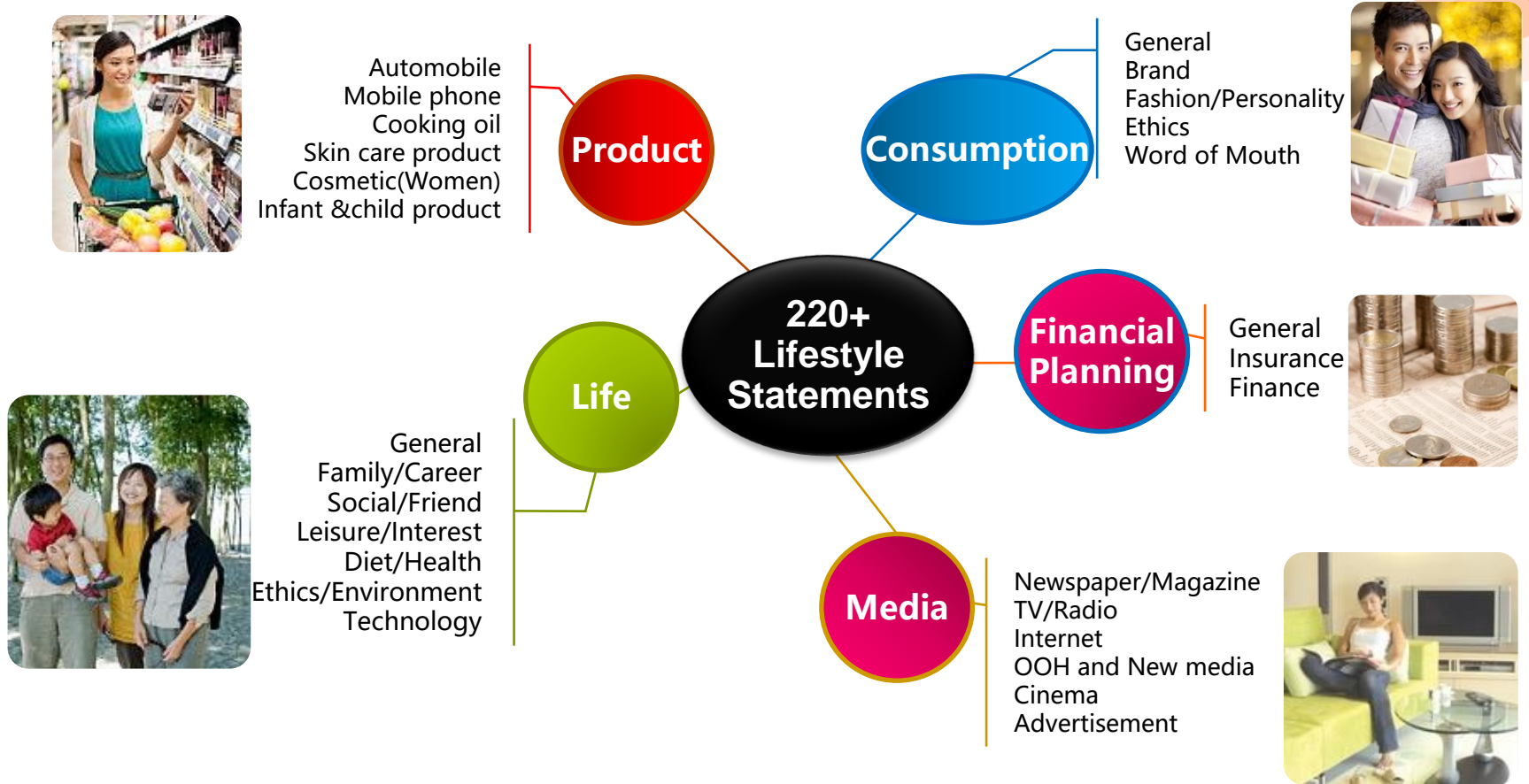
- Brand Pyramid
- Brand Shift
- Brand Development level

- Brand Awareness
- Brand Penetration
- Brand Preference
- Brand Loyalty
- Brand Ownership
- Brand Substitution
- BDI

- Brand Awareness
- Brand Ownership
- Brand Purchase Intention
- Brand Attraction
- Brand Ownership
- Brand Diversion
- BDI

- Brand Awareness
- Brand Penetration
- Brand Preference
- Brand Loyalty
- Brand Ownership
- Brand Substitution
- BDI

CNRS-TGI Lifestyle & Attitude Statements



CNRS-TGI Lifestyle & Attitude Statements (Continued)

- In addition to the 220+ attitude statements on consumers' values, CNRS-TGI delivers deeper insights by delving into consumers every aspects of their life.



Advantages of CNRS-TGI

Authority: CNRS-TGI was set up according to international single source survey research standards jointly adopted by 60 countries globally, ensuring quality, credibility and authority

Representativeness: CNRS-TGI implements **Probability-Proportional-To-Size Sampling** methodology integrated with China administrative residential committee system to guarantee samples' representativeness.

Benchmark: CNRS-TGI is being used by **4A agencies in China**, as well as international and domestic leading media groups and brand owners. CNRS-TGI has firm client and market base and has become the industry standard for media data.

Long History: Running for **17 consecutive years** in China (1999-2016), CNRS-TGI provides extensive coverage and longitudinal data on China's social, economical, life and media transitions.

Professionalism: CNRS-TGI has well established **customer service team** and professional **media research team**. Not only can we deliver tools and data, but we also provide **consulting services** as a way to constantly extend the application values of CNRS-TGI.



CNRS-TGI

CNRS-TGI Clients —— 4A Agencies

groupm 群邑

GroupM
(BJ/SH/GZ/SZ/CD/HZ/NJ)

MCC

MEDIACOM
People first, better results

X AXIS · 邑策

MINDSHARE



AMARIS

oMD **phd**

Omnicom Group
OMD/PHD
(BJ/SH/GZ)



IPG Mediabrands
Mediabrands/Universal McCann
(BJ/SH/GZ)



ADK
/Tokyo ADK
(BJ/SH/Tokyo)

HAKUHODO **HAKUHODO**
HAKUHODO/TBWA/
HAKUHODO TOKYO
(BJ/SH/GZ/Tokyo)

CNRS-TGI Clients

— Local Advertising Agencies



CNRS-TGI Clients —— Brand Owners

Johnson & Johnson
强生



Jahwa
上海家化
用心遇见美



益海嘉里

Aimer
爱慕



Wyeth® 惠氏®

Sunrain
太阳雨太阳能



远大购物中心



JDB
加多宝集团

CNRS-TGI Clients

— Media Owners

Google

搜 狐
SOHU.com

中国湖南卫视

CITVC
中国国际电视总公司
CHINA INTERNATIONAL TELEVISION CORPORATION

SMG
上海东方传媒集团有限公司
SHANGHAI MEDIA GROUP

CNR
中央人民广播电台
China National Radio

SBS
苏州广播电视总台

黑龙江人民广播电台
HEILONGJIANG THE PEOPLE BROADCASTER

TVB

时尚
TRENDS

CONDÉ NAST
DIGITAL

瑞丽
RAYLIA

HEARST corporation

精品购物指南®
Life Style

北京青年报
BEIJING YOUTH DAILY

广州日报
GUANGZHOU DAILY

深圳特区报

重庆商报
ECONOMIC TIMES

现代传播
Modern Media

新闻晚报
SHANGHAI EVENING POST

南方都市报
办中国最好的报纸

DYTM G+J

CNRS-TGI Clients

P&G

Amway

Dior

COTY

SONY

VISA



The Coca-Cola Company



PEPSICO

TOYS R US

Lilly



ESPN

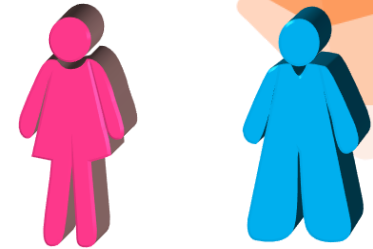


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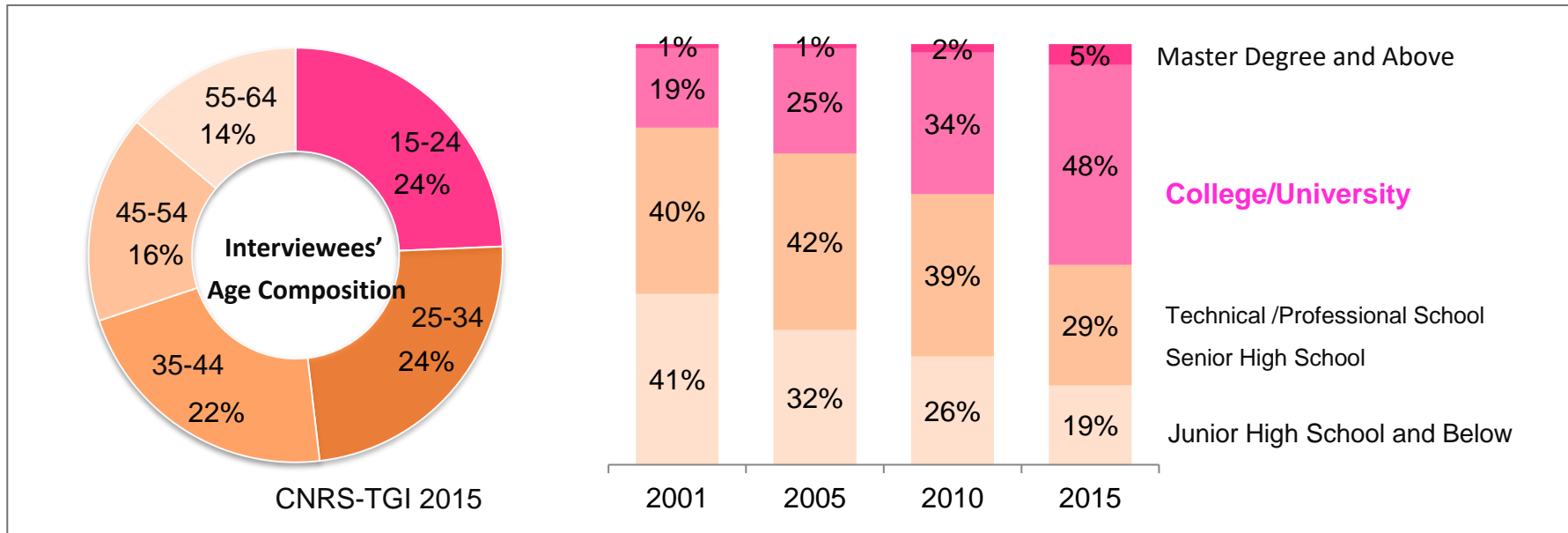
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Mainstream Urban Consumers

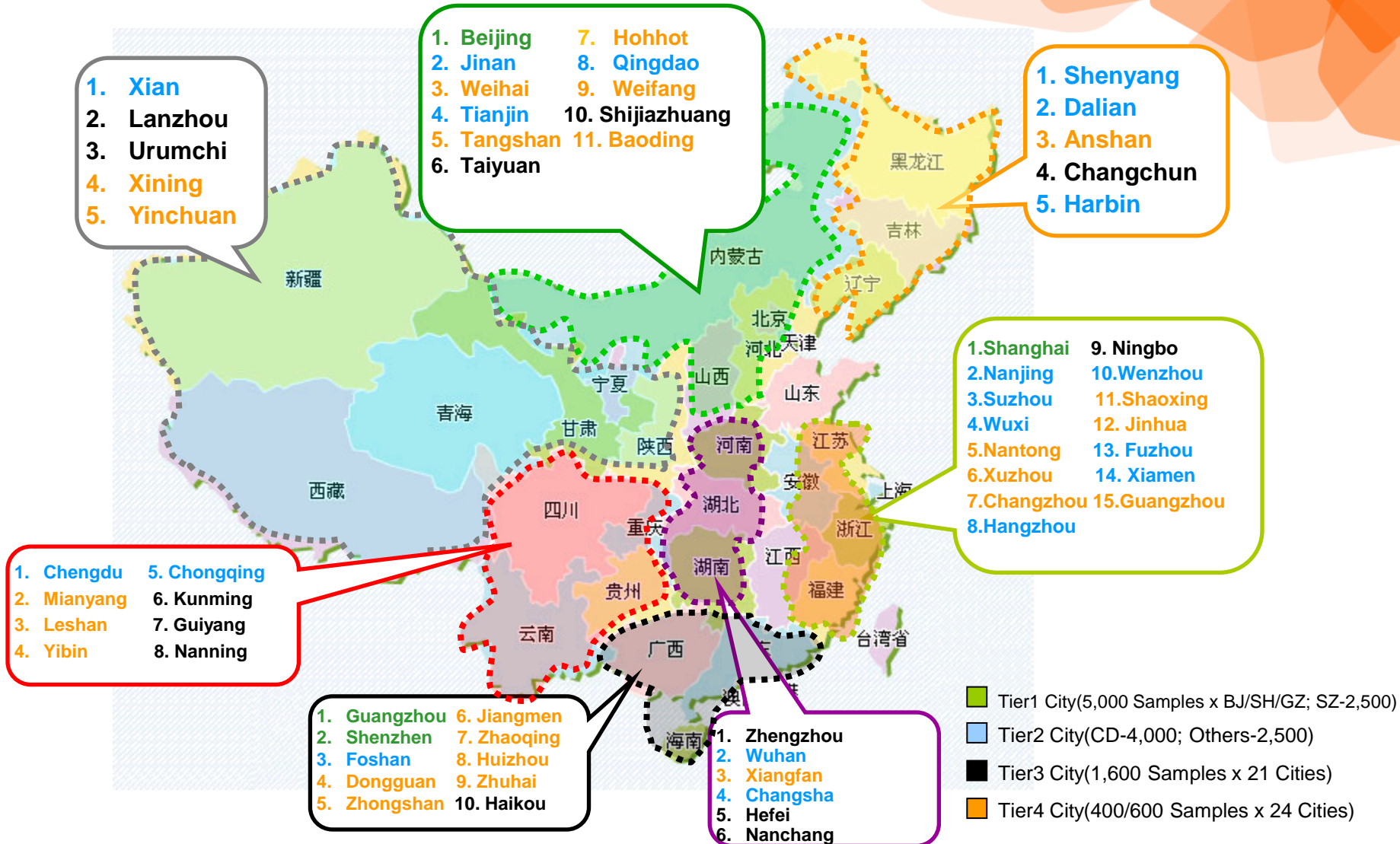
- Targeted at **15-69 year-old** city residents, which accords with age structure in national population census
- Local core consumers** who live at home at least 5 days a week
- Nearly 100,000 samples a year, representing **180 million** citizens
- Quota is based on the age of population, to reflect consumer behavior



Female: 48.3% Male: 51.7%
CNRS-TGI 2015

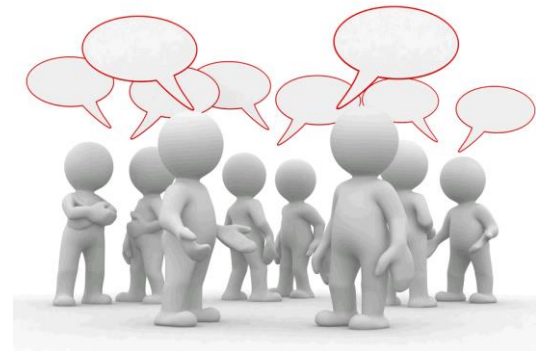


Covering 7 Regions, 60 Tier 1 - 4 Cities



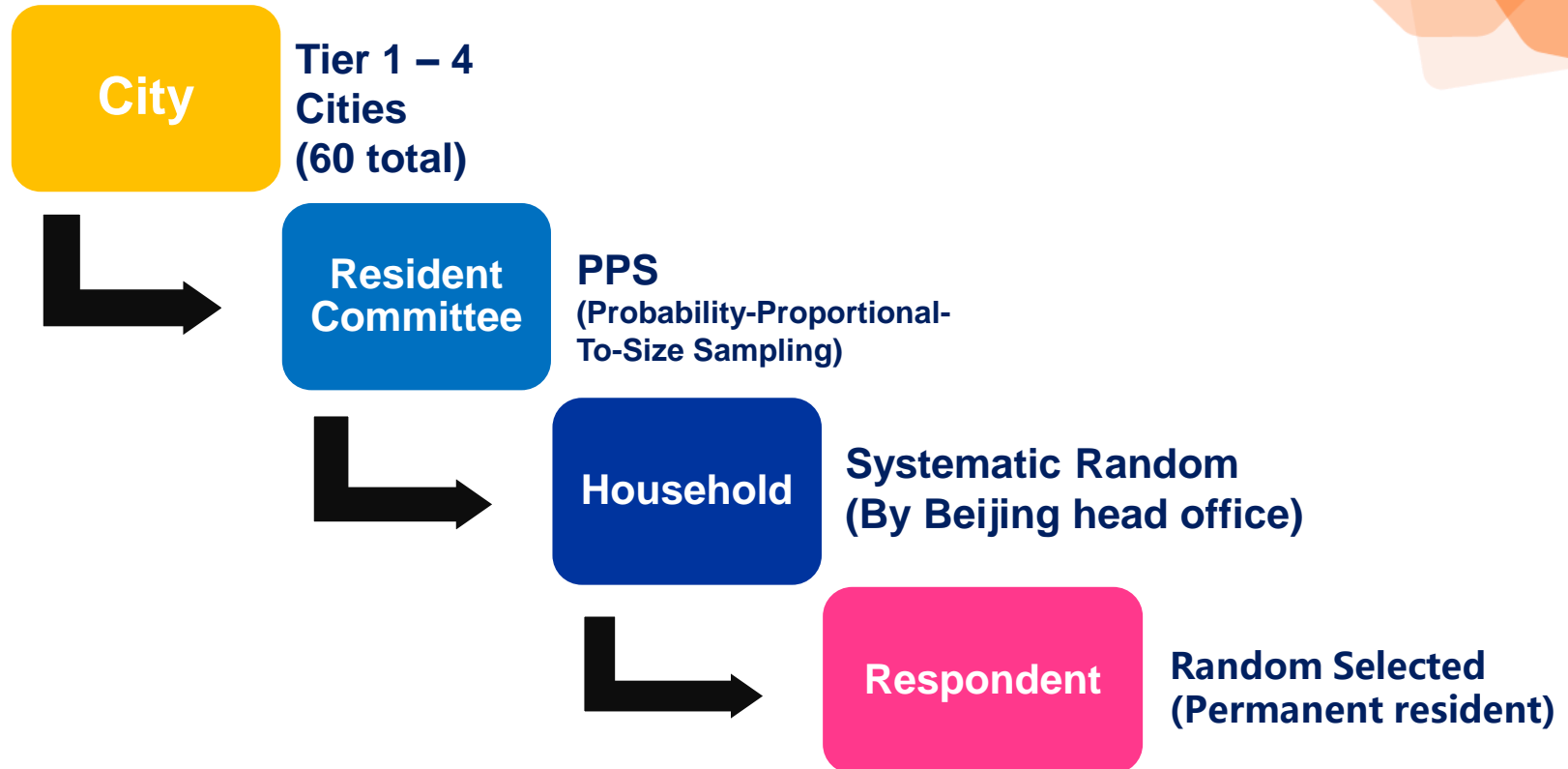
Select and Classify Cities based on Authoritative Data

Based on the most authoritative **macro data** in China, we selected **60** cities out of the **500** monitored by CTR and classified them into **4** tiers:



Tier I	Beijing/Shanghai/Guangzhou/Shenzhen, leading economic aggregate and steady top 4 in domestic city GDP ranking
Tier II	Municipalities (Tianjin/Chongqing) Economically developed provincial capitals // cities with independent planning / important cities (Foshan / Wuxi / Suzhou / Wenzhou) (Economically developed provincial capitals refer to the top 15 provincial capital cities ranked by GDP)
Tier III	Economically underdeveloped provincial capital cities
Tier IV	Important non-provincial capital cities in developed provinces (GDP>30 billion) (Xuzhou / Changzhou) Underdeveloped provincial capital cities with nonagricultural population less than 1.5 million (Hohhot / Xining / Yinchuan) Total volume of retail sales above 50 billion

Apply PPS Sampling Methodology



Quarterly Rolling Release so as to Provide Clients lasted Market Information

- Surveys in tier 1 - 3 cities are conducted throughout the year. Data are released every 3 months, Q1(Oct-Mar)/Q2(Jan-Jun)/Q3(Apr-Sep)/Q4(Jul-Dec)/Full year data (Jan-Dec)
- Tier 4 city data are released twice a year in two data waves:Apr-Sep release and Jan-Dec full-year data release.

		Data Collecting																	
Freq.	Release	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6
No.1	Q1																		
No.2	Q2																		
No.3	Q3																		
No.4	Q4																		
No.5	Full Year Data																		

Professional Softwares Make In-depth Data Mining Can be Realized



- Provided by 3rd party
- High Cost
- Only basic functions available, additional client purchase needed for advanced analysis modules
- Telmar company staff provides software, training and support



Clear Decisions

- Provided by 3rd party
- Low cost
- Free cluster analysis module
- Service provided by CTR, more flexible and faster support
- Smart Views function enables more direct data interpretation

Basic Function



CrossTab Analysis
Core basic functions in data analysis



Corr
Mining in consumer lifestyle



R&F
Optimizing media planning



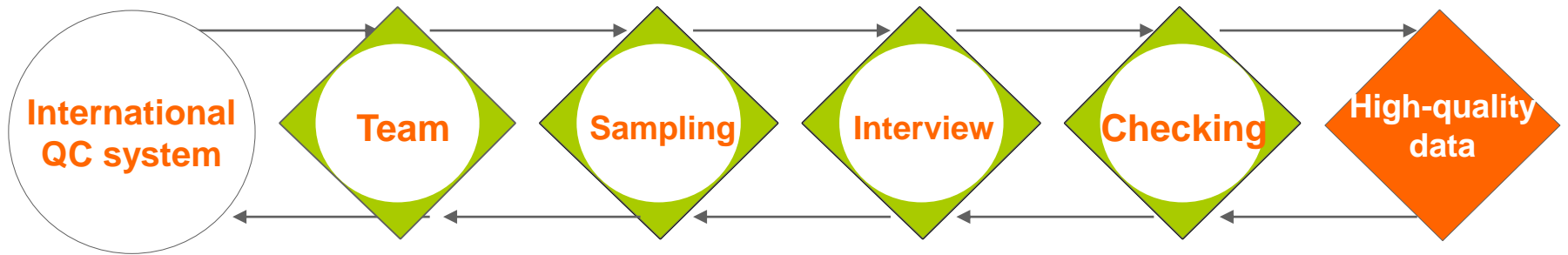
PMaps/ViewPoints/QuadMap
Brand/Categories market positioning

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How do We Guarantee our Data Quality?

CTR control the whole data collection process



International Quality Control System



- CTR is a member of **Six Sigma** Promotion committee of China Quality Association, and a Six Sigma Green Belt preliminary inspection unit.

ISO20252

- Passed third-party SGS (Standards Technical Services Co., Ltd.) on-site inspection by meeting every service requirement set by ISO 20252 – market research industry international standards



- Implemented **ISO9001:2008** Quality System Certification, CTR is the first domestic market research company that has received ISO9001 certification.

ESOMAR
WORLD RESEARCH

- ESOMAR is a **worldwide association of professional researchers**. Many of CTR's research experts are loyal members of ESOMAR who strictly abide by the international industry standards for market and social research.

Fieldwork in most Major Cities is done by CTR's Local Fieldwork Stations



Fieldwork in a Few Tier 4 Cities is Outsourced to WPP Group Certified Agents



is the world's **largest** media group. It owns not only media agencies, media companies, PR companies and other professional companies, but also many research companies including **KANTAR Group**.



Strict Quality Control over Sampling Frame to Ensure the Objective Reflection of the Market



Ordinary Residential Complex

Accounts for **85%** of all respondents



- With independent security system (e.g. bounding ball, security guard, TV monitoring system)
- Constructed after 2000
- Housing prices above average
- Qualitative review by local CTR staff

Luxury Residential Complex

Accounts for **15%** of all respondents

Maintaining the Utmost Scientific Sampling, Whilst Simultaneously Remaining Committed to Modern Survey Methods



Sampling methodology maintained;
offline invite done by CTR staff

Appointment made at the actual residential area in cooperation with the property management company and residential committee etc.

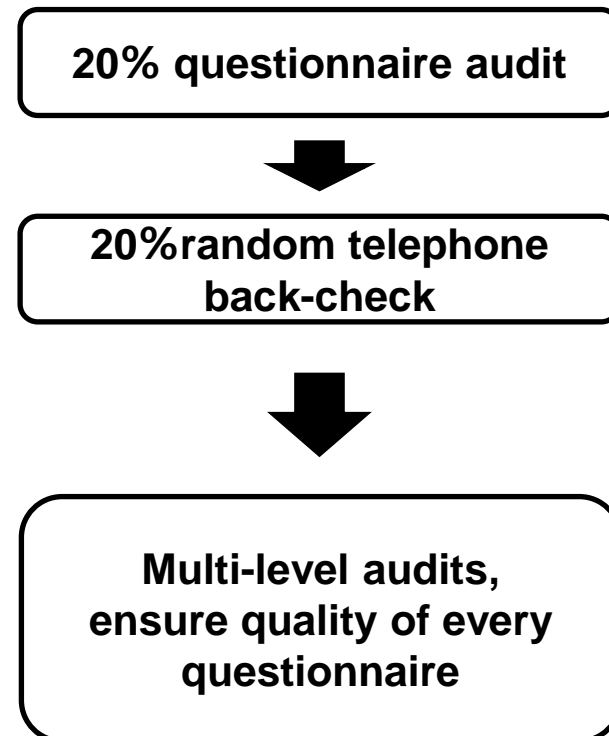
Qualified respondents fill out the questionnaire online; FW monitors the progress and quota online.

Strict Multi-level Audits

Local fieldwork stations in every city



Beijing HQ



Income Data in CNRS-TGI from 2012-2014: Reflect High Data Quality

Income Data of CNRS-TGI vs. Official Report in Major Cities

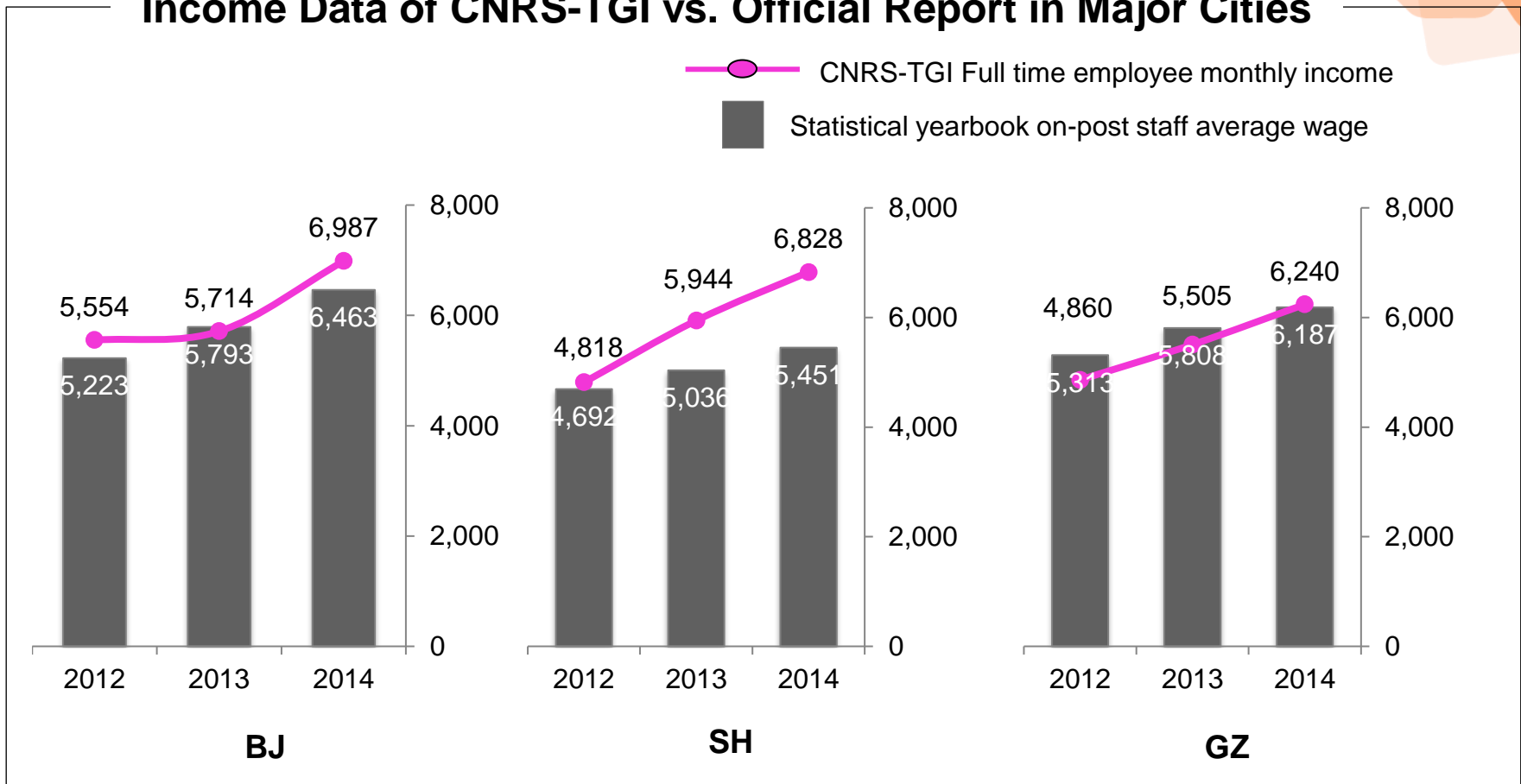


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How Can CNRS-TGI Help Clients?

Three ways to help clients

Research topic

- Product Consumption Market
- Consumption Behavior
- Brand Preference
- Customer Characteristics
- Customer Lifestyle
- Customer Media Contact
-



I. Defining TA



II. Consumption Insight



III. Media Contact Study



How Can CNRS-TGI Help Clients?

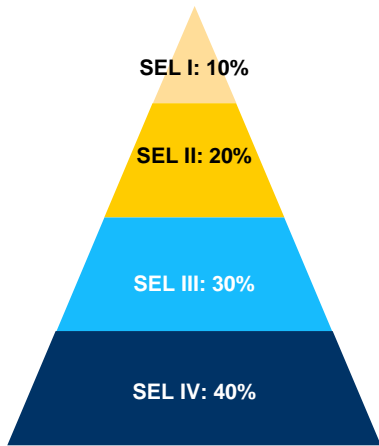
TA Definition

- Accurately defining TA through models of SEL, FW and Life stage
- TA portrait description (gender, age, education background and income etc.)
- To explore the values of TA

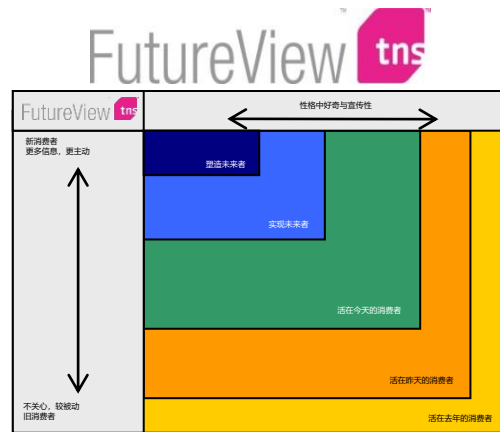
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CNRS-TGI Research Models Help Defining TA Accurately



Socio-Economic Levels Research Model



Future View Model

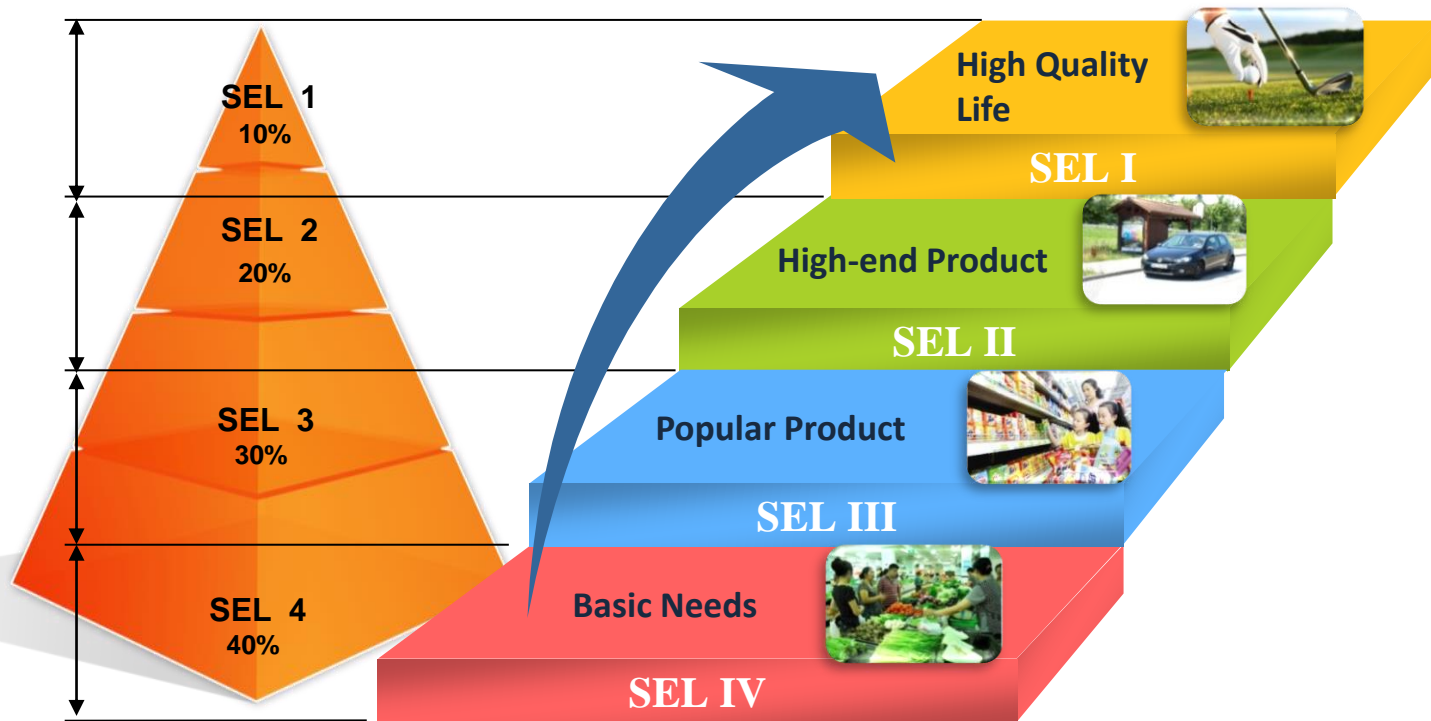


Lifestage Segmentation Research Model

CNRS-TGI Research Models Help Defining TA Accurately

- Socio-Economic Levels Model

- SEL (Social-Economic Levels) is a social-economic stratification model that meets the demand for analyzing the differences in media habits and consumption behavior of consumers of different Socio-Economic Levels.
- Unlike past classification method based on consumer's income only, SEL divides the population into four groups based on the overall effect of 12 indicators that measures consumers' social prominence, economic capability and consumption levels etc. SEL is a better indicator of consumers' social-economic background.



CNRS-TGI Research Models Help Defining TA Accurately

- Socio-Economic Levels Model

Fashion information channel by females of different social-economic levels
(Index, Base=all female)

Ways of obtaining fashion information	SEL I(10%)	SEL II(20%)	SEL III(30%)	SEL IV(30%)
I don't care about fashion, it's not important to me at all	69	80	91	129
Observing what people on the street wear	76	91	107	107
Checking out what the shop	94	101	106	97
Chatting with friends about fashion	127	120	105	76
Watching fashion TV shows	120	118	105	79
Checking out what superstars wear	157	131	101	64
Reading fashion magazines	215	158	89	42
Reading "Shopping" and "Clothes" columns in the magazine	211	155	94	40
Introduction on clothing companies' websites	187	132	108	50
Online Ads / Reports / Forums	220	148	96	40
Ads and promotional events conducted by clothing companies	173	121	110	59
Bus body / billboard outdoor ads	134	136	94	74
Radio ads / reports	191	139	94	55

SEL I&II

- Fashion for all the time
- Advertising is very important
- Fashion enthusiast; likes to talk about fashion

SEL III

- In preliminary stage of fashion
- Singular channel of fashion information
- Deeply influenced by non-media information channel

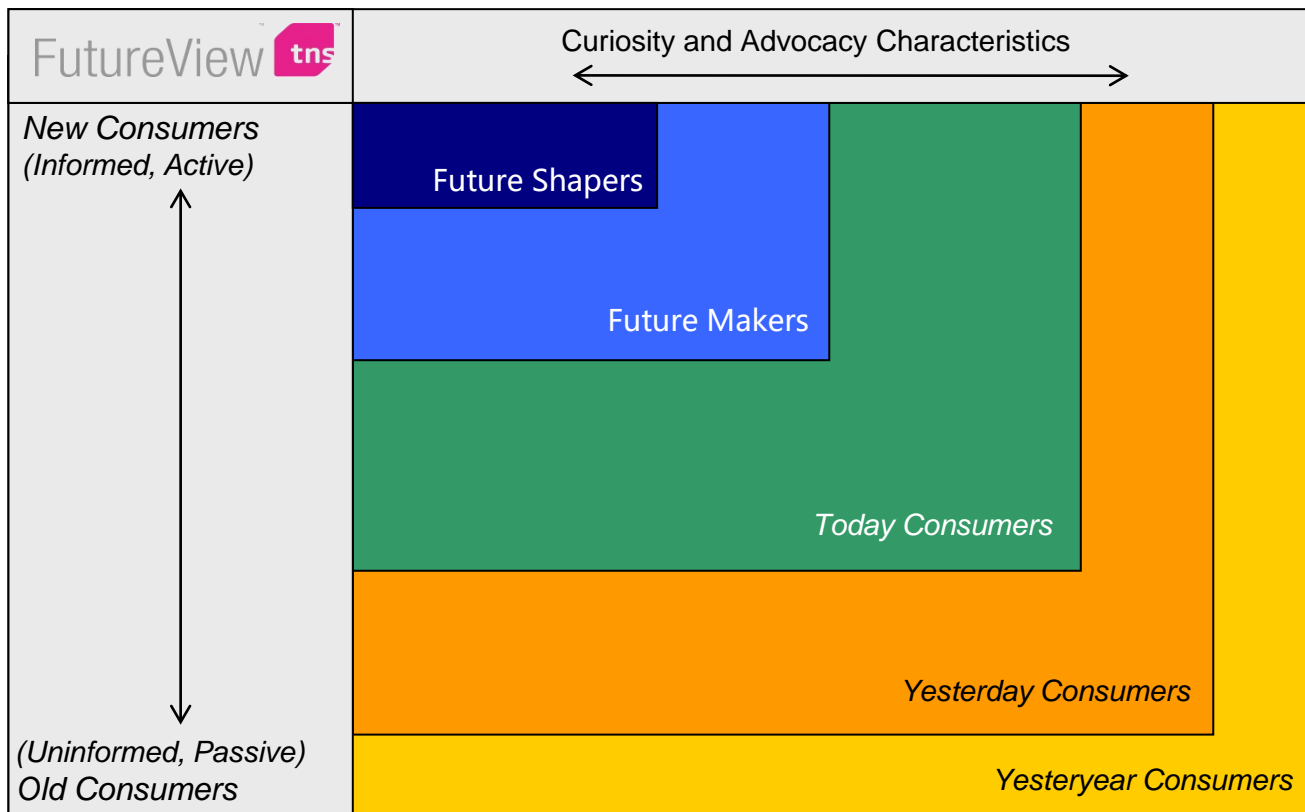
SEL IV

- Absent of fashion in their life

CNRS-TGI Research Models Help Defining TA Accurately

- FutureView Model

- FutureView Model allows us to identify the most influential consumers for future market. We can find out future trends of the market and opportunities for our clients by analyzing them.

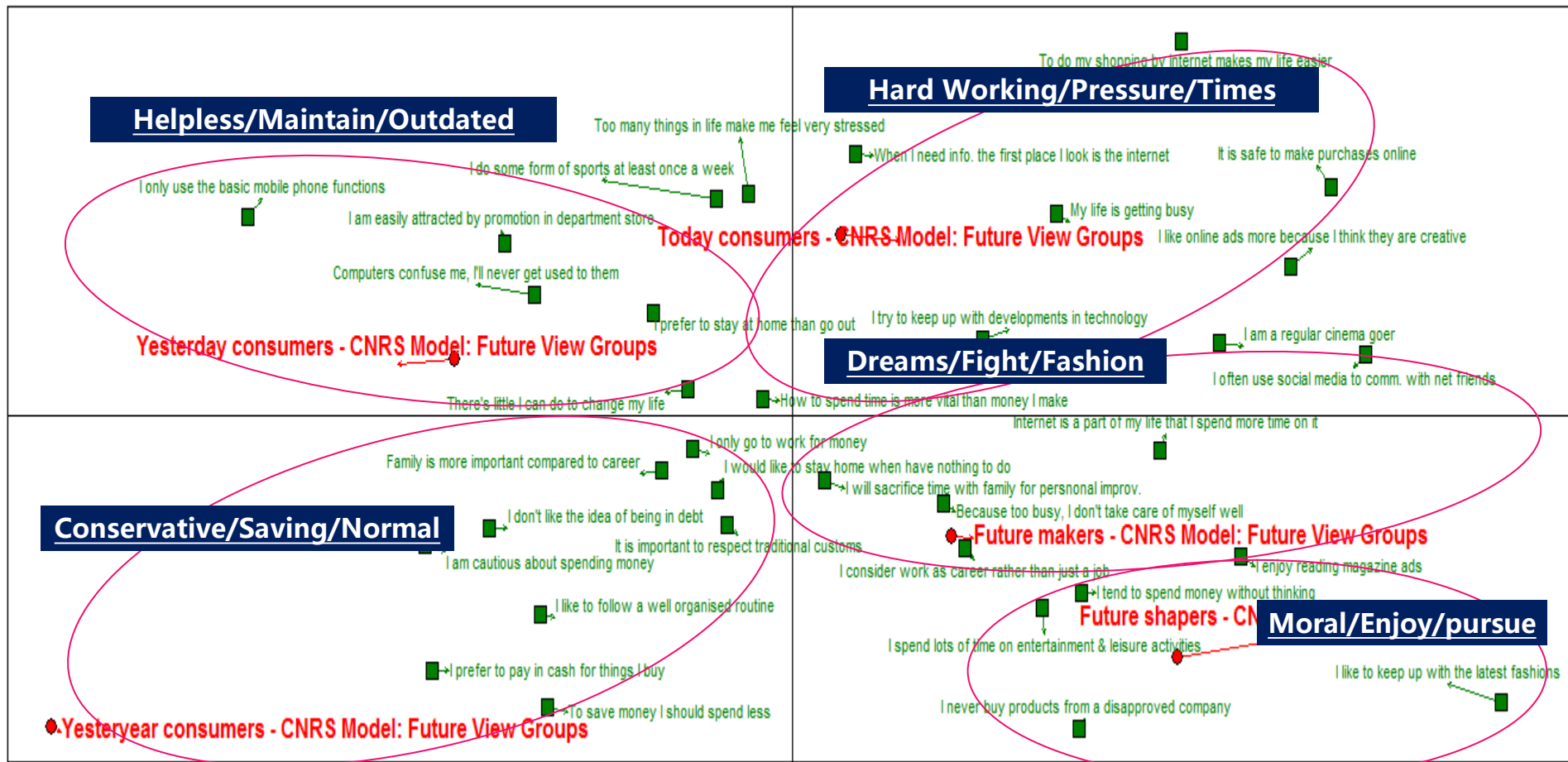


CNRS-TGI Research Models Help Defining TA Accurately

- FutureView Model

Values and lifestyles of different categories of people in FutureView

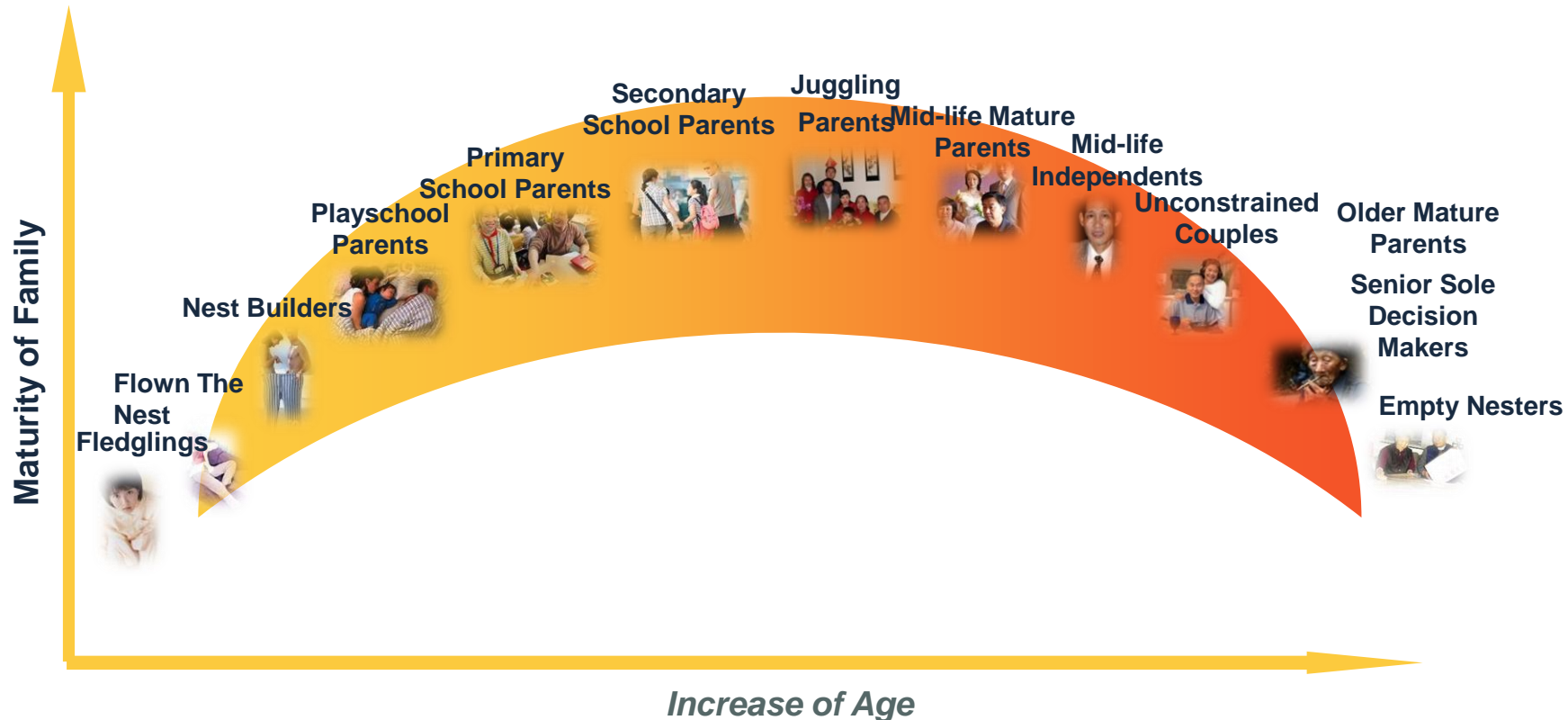
Factor 1=89.9 Factor 2=7.2



CNRS-TGI Research Models Help Defining TA Accurately

- Life Stage Model

- Life Stage Model: 13 family cycles have been defined according to people's age and family status. Respondents within the same family cycle demonstrate highly similar behavior in consumption and living, which makes the LS Model an effective segmentation tool.



CNRS-TGI Research Models Help Defining TA Accurately

- Life Stage Model

People at Different Stages in their Lives Demonstrate Different Characteristics

.....



Flown The Nest

- Stage: Work, before marriage
- Characteristics: Low salaries, little or no savings, high expenses. It's a time for improving one's market value, the focal point is to invest in themselves and to develop one's quality.
- Consumption: People in this stage are young and would like to keep up with the trend, they focus spending on entertainments and necessities.



Nest Builders

- Stage: Married and do not have a child
- Characteristics: Both wife and husband have incomes and, as a result, family life is stable and comfortable.
- Consumption: During this period of time, durable consumer goods such as car, house etc. are highly demanded, and the family have the ability to afford their high consumption.



Middle School Parents

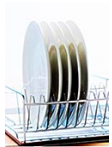
- Stage: Have a child studying in the middle school
- Characteristics: Generally speaking, couples in this period are in a relatively good and stable situation with abundant working experience and good savings.
- Consumption: Have form a steady habit in consumption, will think carefully before actual purchase, be hardly influenced by advertisements and have a trend of purchasing mass produce product.

CNRS-TGI Research Models Help Defining TA Accurately

- Life Stage Model

Families in different lifestages show different needs for AV products / IT products / small household appliances / cars
(Index, Base=all families)

Fledglings
(15-34/Single/
No child/Two generation)



197



184



181



171

- Fledglings have needs on small household appliances which could improve the quality of their life.
- Dishwasher, air cleaner, oven and water clarifier

Flown The Nest
(15-34/Single/
No child/One generation)



154



151



146



144

- People during the “Flown the Nest” period are interested in IT/AV products.
- Laptop, tablet computer, home theatre and mobile phone.

Nest Builders
(15-34/Married/
One generation)



179



171



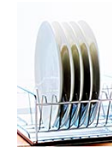
153



149

- “Nest builders” need both big and small household appliances
- Air cleaner, car, juice extractor and toast machine.

Playschool Parents
(Two generation,
with 0-6yrs old child)



150



145



142



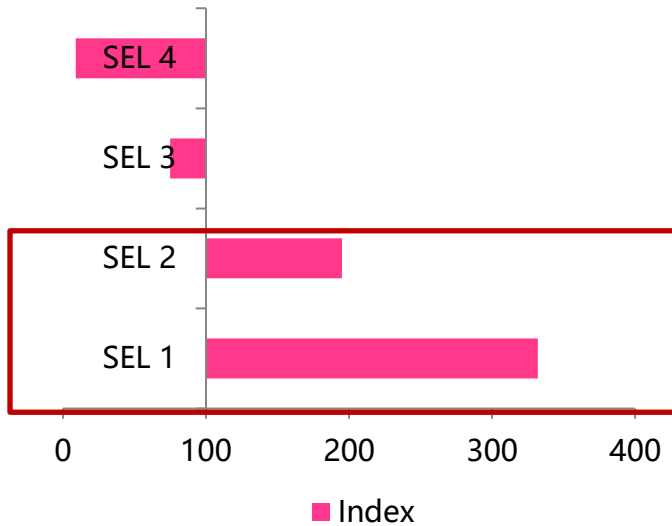
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- Playschool parents have urgent needs on big household appliances
- Dishwasher, camera, PDP TV and car.

Target Audience Group: Demographic Characteristics & Values

Prospective SUV buyers have higher social status and in the stage of life: have a family with child

Social Level



Lifestage

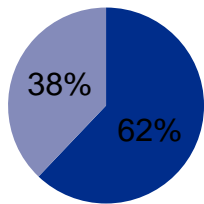
Lifestage	Index
Juggling Parents (35+/have child/three generation)"	213
Playschool Parents (two generation/have child aged 0-6)	196
Nest Builders (15-34/married/one generation)	153
Primary School Parents (two generation/have child aged 7-11)	150
Secondary School Parents (two generation/have child aged 12-14)	129

Target Audience Group: Demographic Characteristics & Values

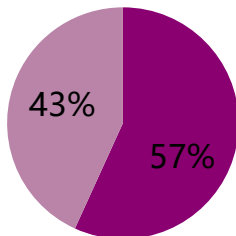
Prospective SUV buyers are mainly young men

Gender

■ Male ■ Female

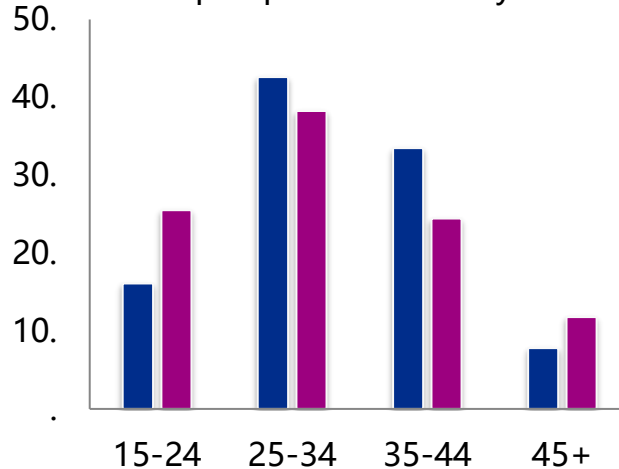


■ Male ■ Female



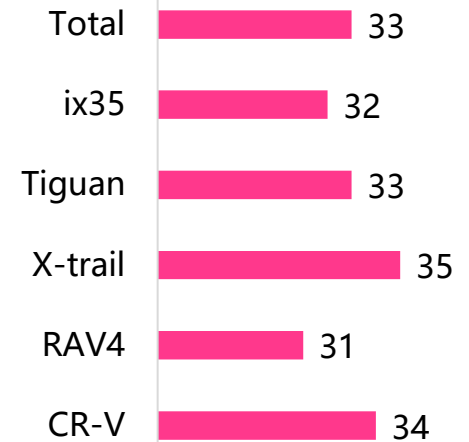
Age

■ Prospective SUV buyers
■ None prospective SUV buyers



Brand

Average age of prospective SUV buyers



Find Target Groups through Cluster Analysis

Account for 60% of total

Quality Crusaders (36%)

- Family-oriented and practical
- Enjoy challenges & change, constantly in pursuit of progress
- Concerned about food nutrition and quality
- Loyal and Trusting of famous brands



Fashion & Health Pursuers (24%)

- Busy, hard-working, career minded
- Eat healthy food and exercise regularly
- Loyal to brands but also like to try out new food & drink
- They consider brands as a reflection of personality, prefer original brands
- Fashionable, trendy and have wide interests



- Cluster analysis on buyers of family food and daily commodities reveals that Quality Crusaders and Fashion & Health Pursuers are target consumers of mid-range to upscale food.
- Their profile: aged 25-49 (65%), living in tier 1-2 cities (82%), having mid to high income (65% earns RMB 6,000 or more per month)

Steady Fashion Followers (26%)

- Rational shopper
- Fashion chaser; likes unique brands
- Have wide interests such as music and movie
- Average in other aspects of life



Traditional Frugal Spenders (14%)

- Frugal spender, saver
- Traditional and live an ordinary life
- Lag behind in using new technology products
- Prefer staying at home to leisure outside



How Can CNRS-TGI Help Clients?

Consumption Insights

- Find Market Demand
- Evaluate Category Development Strategy through Brand Substitution / Shift Analysis
- Diagnose Brand Competitiveness by utilized Brand Pyramid
- Shopping Channel Analysis

.....

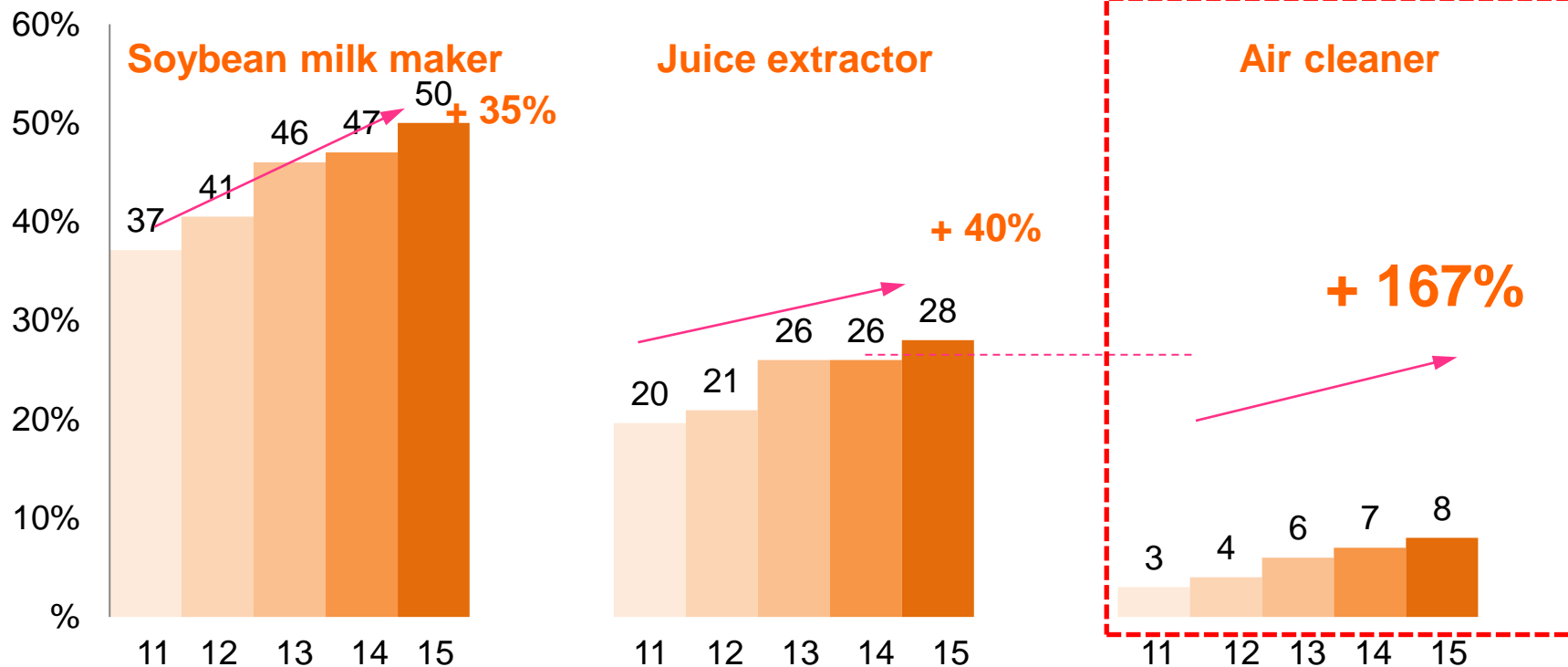


Understand Market Demand from Product Penetration Rate

With the Improvement of Life Quality, small home appliance product ownership continues to increase

Air Pollution Problem Drive the Demand of Air Cleaner

Change in Product Ownership from 2011-2015(%)



Evaluate Category Development Strategy through Brand Substitution / Shift Analysis

Dove body wash has limited simulative effect on its shampoo and conditioner business. But strengthening the promotion of Dove shampoo will help enlarge the user base of Dove body wash products



Utilize Brand Pyramid to Plan Brand Strategy

L'OREAL is the most competitive brand in the mid-range male skincare market

All male skincare brands average



Most frequently used (1.8%)

9.8%

6.2%

4.7%

60%
(conversion rate)

67.1%
(conversion rate)

64.6%
(conversion rate)

59.5%
(conversion rate)

Ever used (3.0%)

14.6%

9.6%

7.9%

21.9%
(conversion rate)

37.9%
(conversion rate)

30.2%
(conversion rate)

28.7%
(conversion rate)

Aware of (13.7%)

38.5%

31.8%

27.5%

L'OREAL can expand brand awareness to strength market position

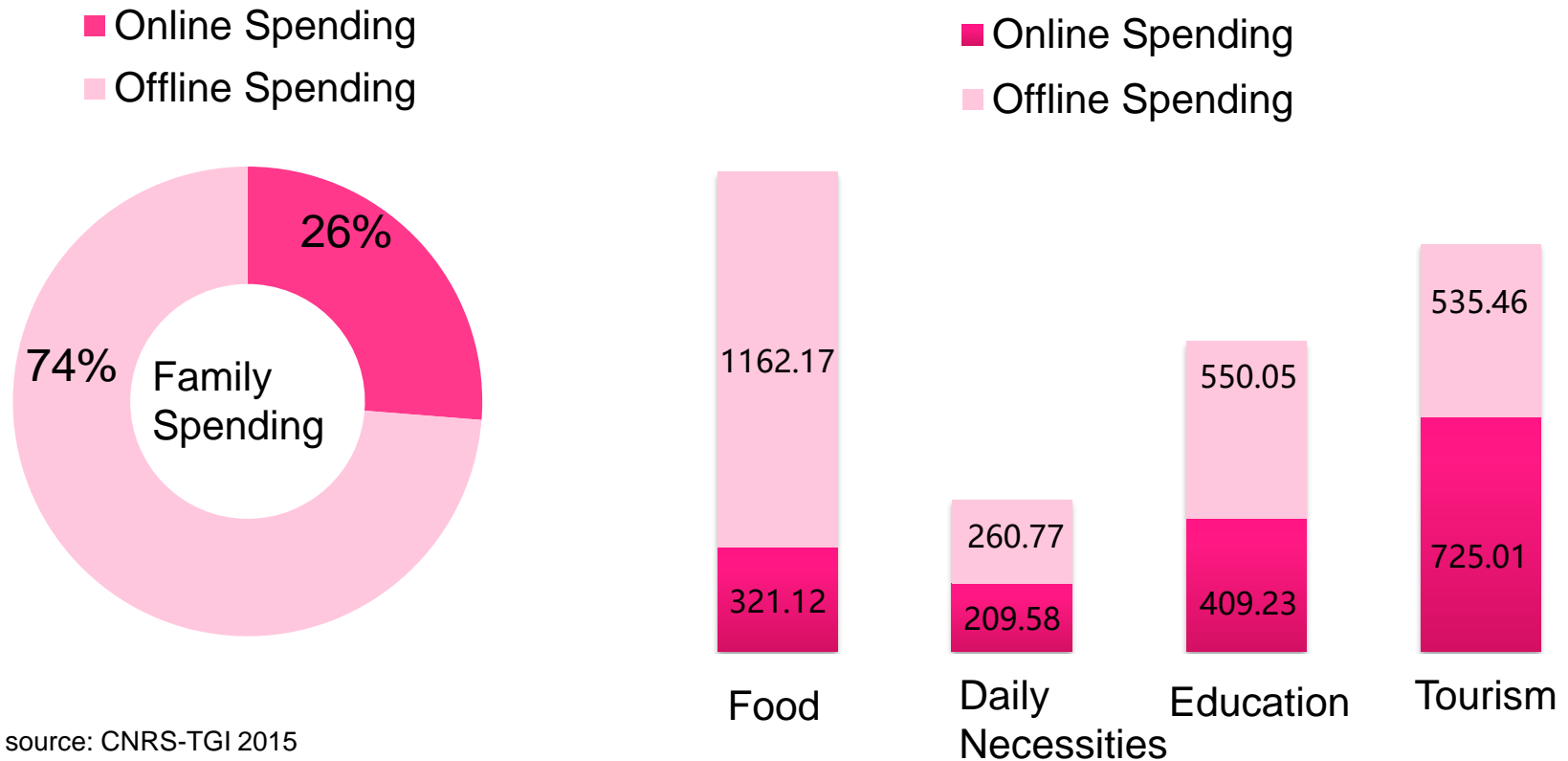
NIVEA MEN can expand brand awareness to promote consumers give the first try

In comparing with the competitors, Mentholatum should expand brand awareness and enhance brand loyalty

Data source: CNRS-TGI 2015

To Observe Online Shopping Potentials by Looking at the Changes of Consumption Channel

Online spending contributes to a quarter of the total spending, besides food still rely on the offline purchase, daily necessities, education and particularly tourism has been shift to online spending



Data source: CNRS-TGI 2015

To Realize Consumer Online Shopping Behavior Differences

Online shopping became a part of consumers' daily life

JD and T-mall are positioned in top two; competitive advantage of dangdang and amazon is not obvious and therefore implies much more substitutability

Purchased product online in the past month

2015 51%

2014 47%









2013 33%

Purchased product online in the past week

2015 38%

2014 36%

2013 16%

Most often used				
	100%	67.4%	40.8%	59.1%
	21.6%	100%	11.3%	27.7%
	49.1%	42.3%	100%	60.8%
	10.7%	15.6%	9.1%	100%
Other three e-commerce	63.3%	81.4%	46.5%	81.3%

How Can CNRS-TGI Help Clients?

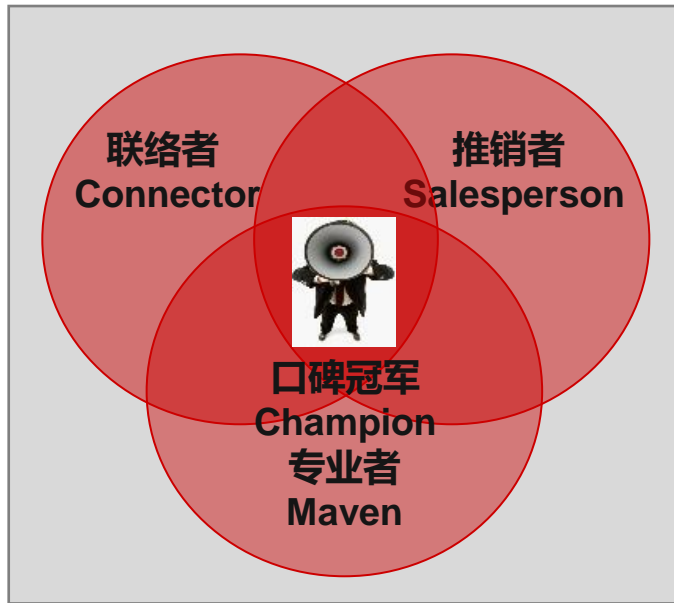
Media Contact Study

- In-depth Study of Media Contacts Through WOM and MNQ Research Models
- To Understand Communication Needs From Perspective of Consumer Behavior and Lifestyle
- Media Development Trend Analysis
- Media Quantitative/Qualitative Research
- Media Touch Point Study

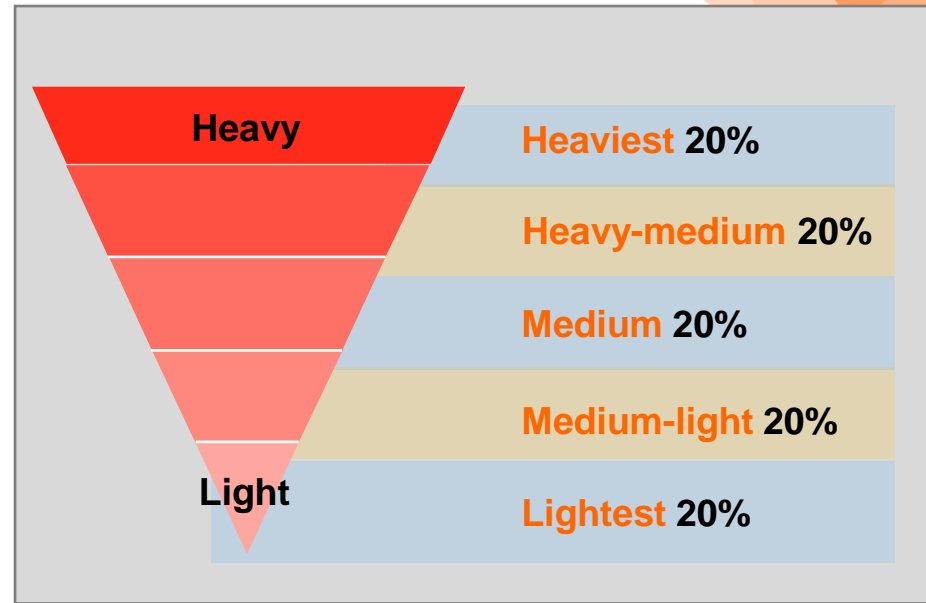
.....



In-depth Study of Media Contacts Through WOM and MNQ Research Models



WOM



MNQ

In-depth Study of Media Contacts Through CNRS-TGI Models

- Word-of-Mouth Model

- WOM model examines media values from the angle of consumers, it allows us to identify the most valuable word-of-mouth communication segment easily.

NO.1

Analyze customers' word of month behavior based on the five fundamental elements of communication

NO.2

Measure media values by quantifying the WOM effect of the media's audience.

NO.3

Identify those who will most likely spread positive words of your brand and calculate the additional reach it generates.

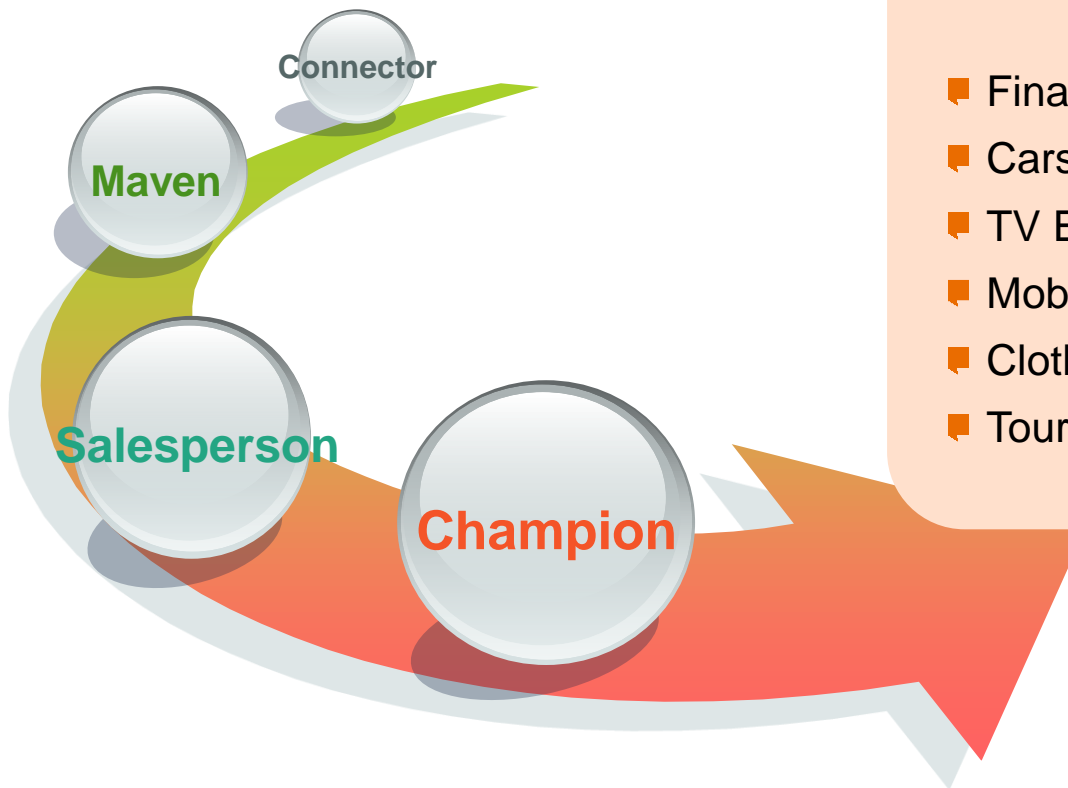


In-depth Study of Media Contacts Through CNRS-TGI Models - Word-of-Mouth Model

We define WOM champion by category

WOM Model covers 13 categories

- Financial Services
- Cars
- TV Equipment
- Mobile Phone
- Clothes
- Tourism
- Food
- Soft Drinks
- Alcoholic Drinks
- Health Supplements
- Household Products
- Medicine
- Toiletries

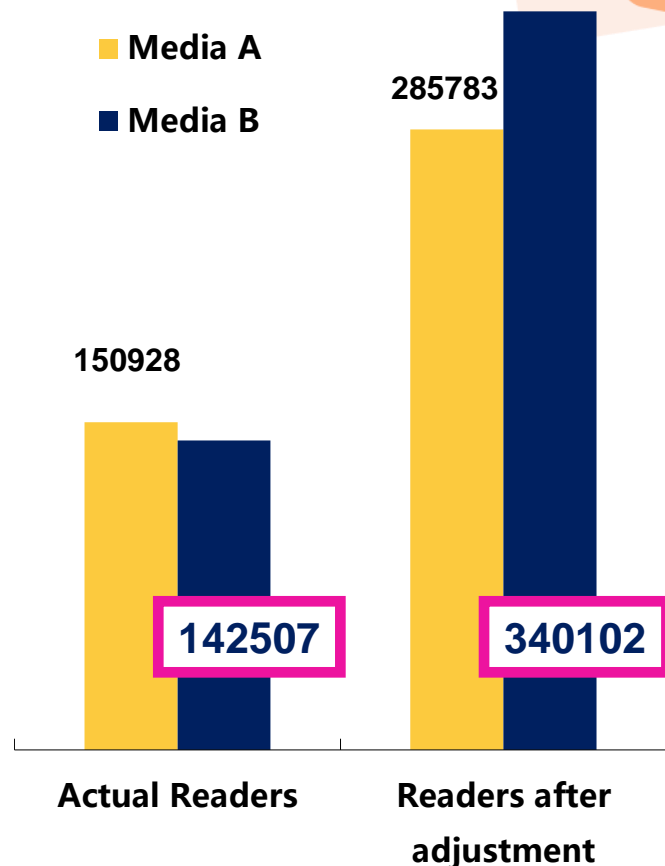


In-depth Study of Media Contacts Through CNRS-TGI Models

- Word-of-Mouth Model

	Media A	Media B
Actual readership	150928	142507
Number of car category champion	4715	10948
Number of car category connector	29456	27173
Number of car category mavens	11267	27579
Number of car category salespeople	6937	17685
Number of car category influencer	30105	30825
Total number of car category WOM readers (exclude champion)	77765	103262
Number of car category receiver	116108	100734
weight of WOM champion	3	3
weight of other WOM reader (exclude champion)	2	2
weight of receiver	1	1
WOM adjusted readership	285783	340102

Adjusted readership after considering WOM effect

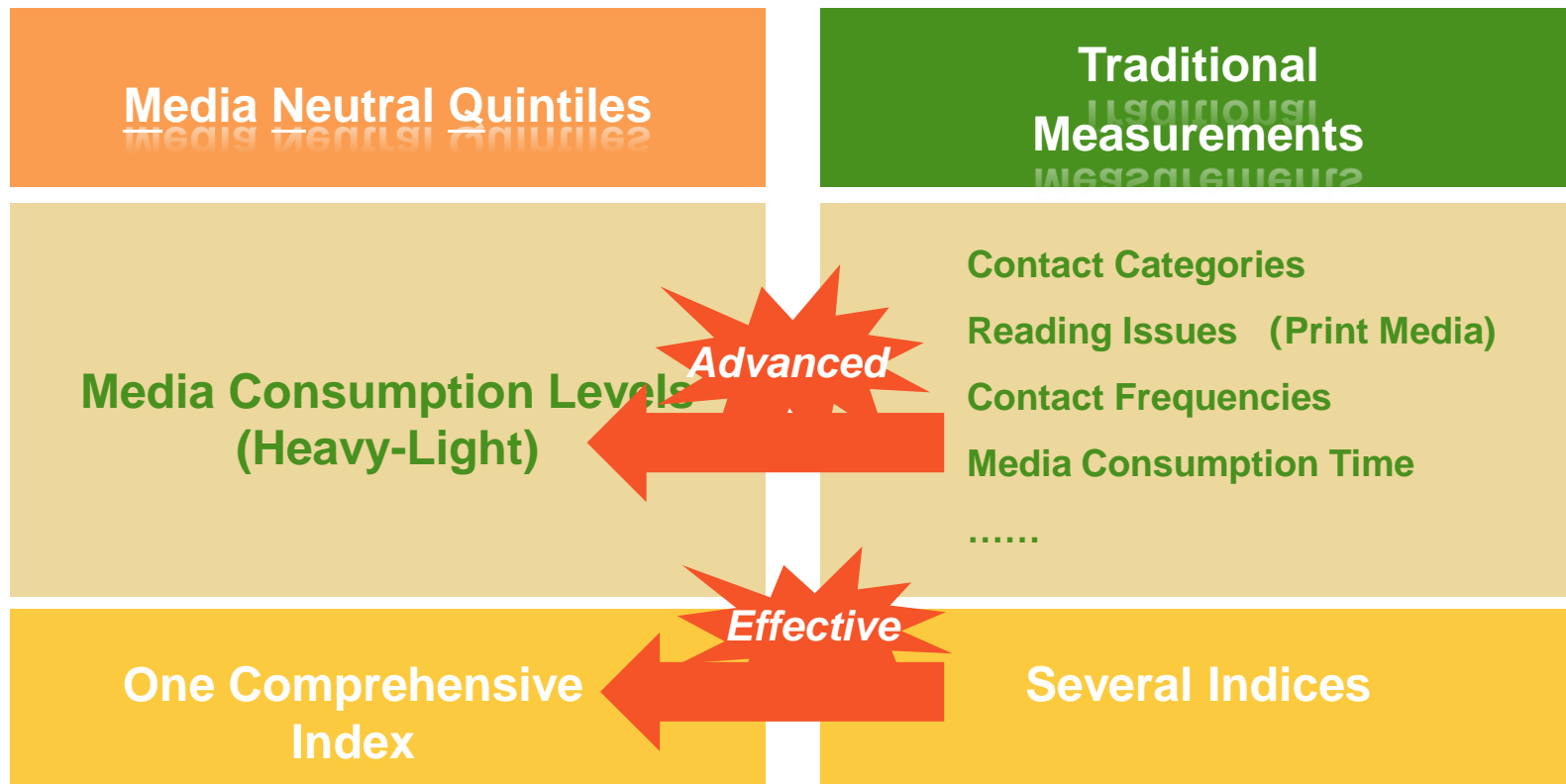


Readership after adjustment=champion*3+other WOM people*2+receiver

In-depth Study of Media Contacts Through CNRS-TGI Models

- Media Neutral Quintiles Model

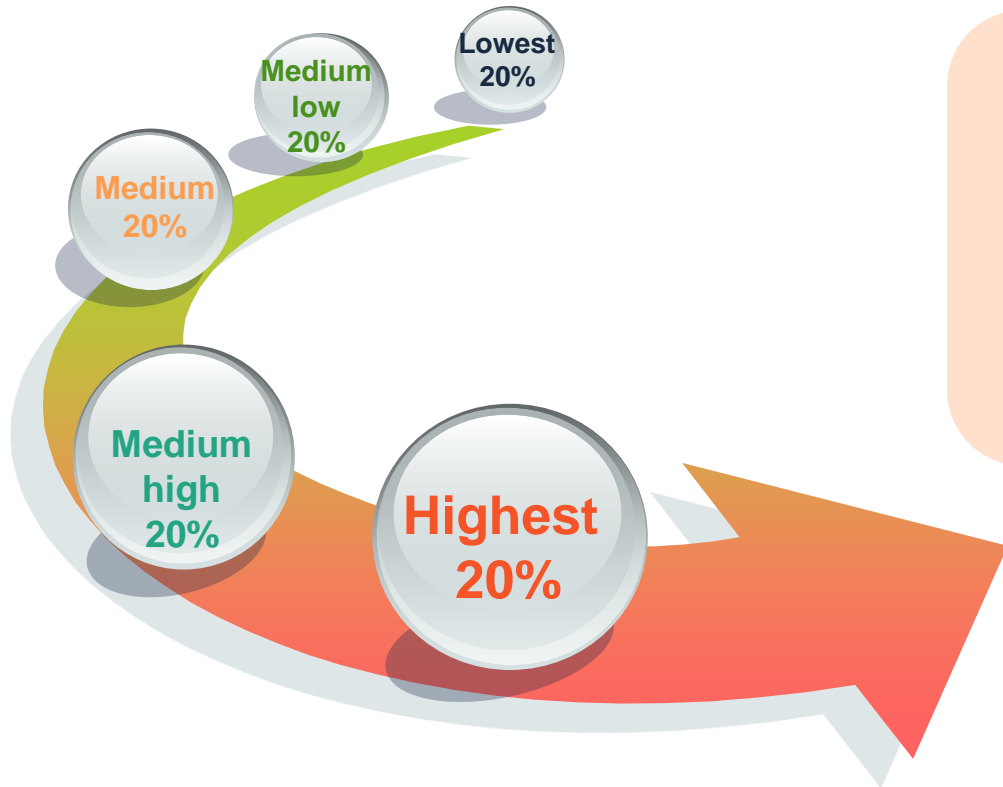
- MNQ Model combines multiple indicators into one to make cross-media comparisons more effective.



In-depth Study of Media Contacts Through CNRS-TGI Models

- Media Neutral Quintiles Model

We divide each media type into five levels



MNQ Model covers seven types of media




- TV
- Newspaper
- OOH
- Internet
- Radio
- Magazine
- Cinema

In-depth Study of Media Contacts Through CNRS-TGI Models

- Media Neutral Quintiles Model

Media influence on sport / functional drink consumers (Base=All Respondents)



Heavy user of each media	Penetration	Index
Internet	46%	154
OOH	44%	119
 Newspaper	34%	109
Magazine	23%	146
 TV	22%	59
Cinema	21%	164
 Radio	13%	103



Internet, OOH, magazine and cinema have deep influence on sport/functional drink consumers. They are effective on promoting consumers' re-purchase.

Interactions on the Internet can promote the emotional connection between consumers and brands.

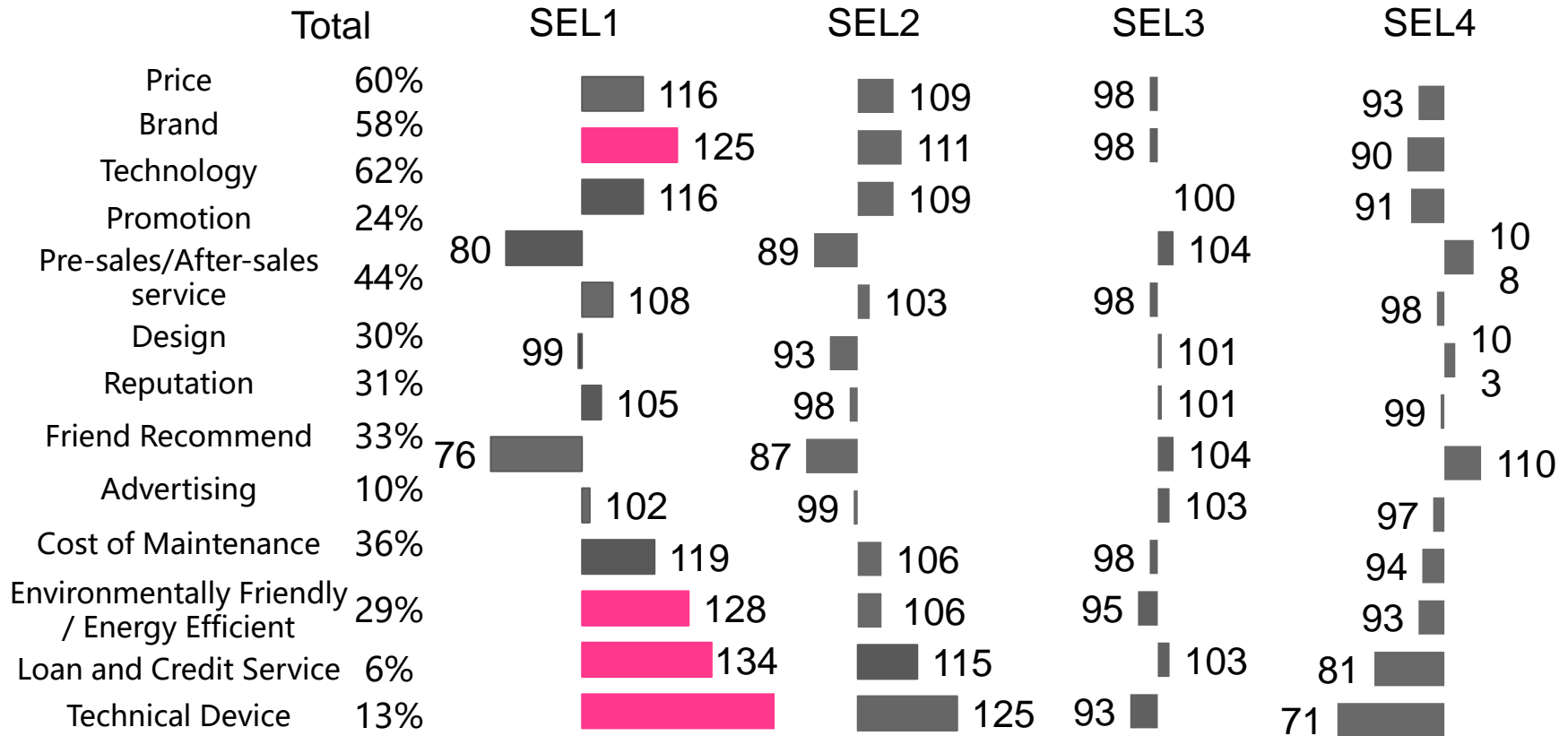
Advertorial material helps consumers get adapted to drinking habit.

OOH Ads is good for enhancing brand awareness and encouraging instant purchase.

Cinema also can be used to enhance emotional connection.

To Understand Communication Needs From the Perspective of Consumer Behavior

Promotions should be focused on Technology, Maintenance, Loan Service etc. since SEL1 segment concern more about those.
 (Purchase consideration of durable good among different SEL groups, INDEX, Base = total)



To Understand Communication Needs From the Perspective of Consumer Lifestyle

With the deterioration of environment pollution problem, consumers increasingly strengthen environmental protection consciousness, they will be particularly influenced by products marketed around environmental friendly; Consumers tend to relax more and spend more time with their families and friends because of the changes in lifestyle

- Environment problems involve every consumer's vital interests.
- Consumers have started real actions to solve environment problems.



	2010 (%)	2015 (%)
I can change my life style for the benefit of environment	57	64 ↑
I concern pollution and congestion caused by cars	54	55 →
I make a conscious effort to recycle	--	75
There is too much concern with the environment	35	--

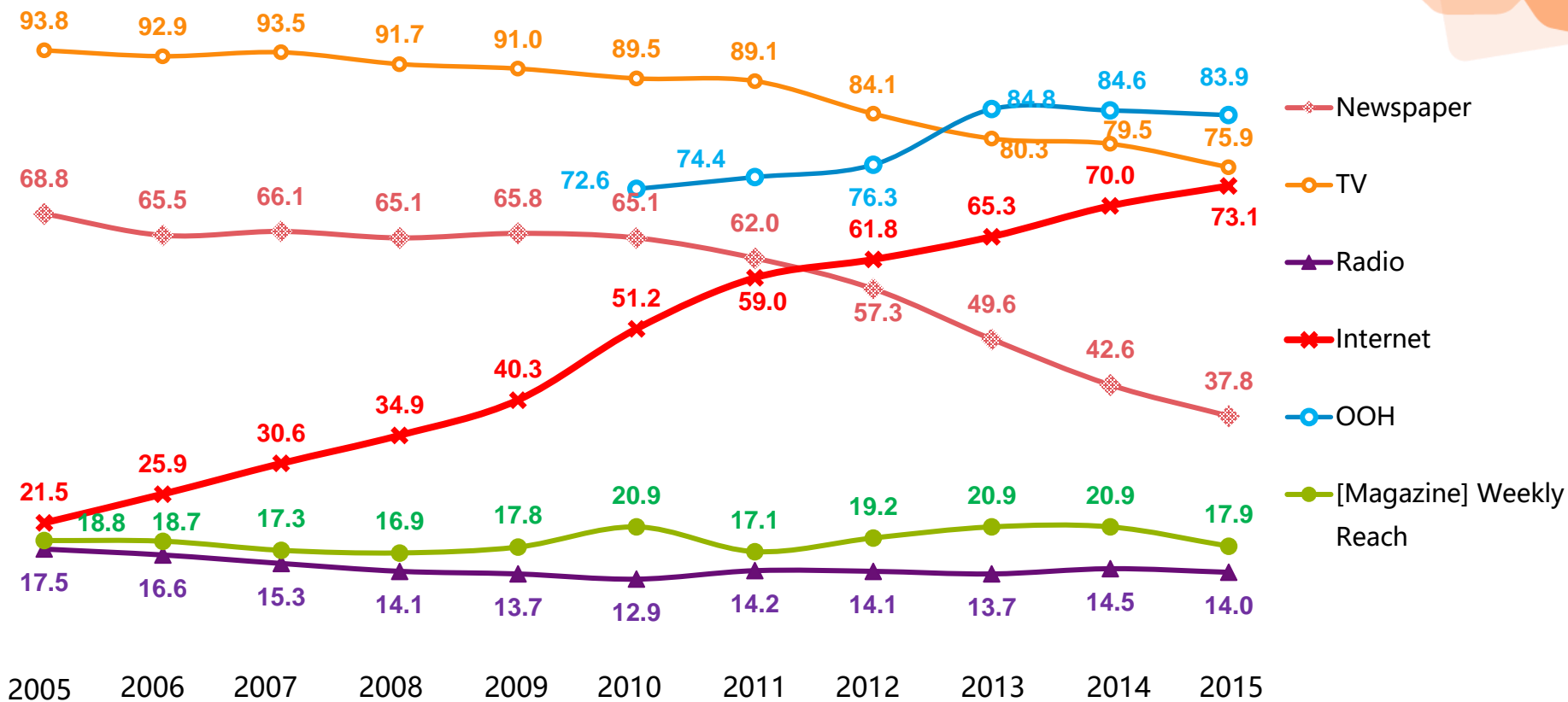
- Consumers have no time to take care of themselves because of their busy lifestyles. They need to slow down, stop and enjoy life.



	2010 (%)	2015 (%)
My life is getting busy	62	63 →
Because too busy, I don't take care of myself well	40	45 ↑
I rarely have time to do things important to me	38	49 ↑

Media Trend Over the Past 10 Years: Internet Was Growing Significantly, Traditional Media Were Falling

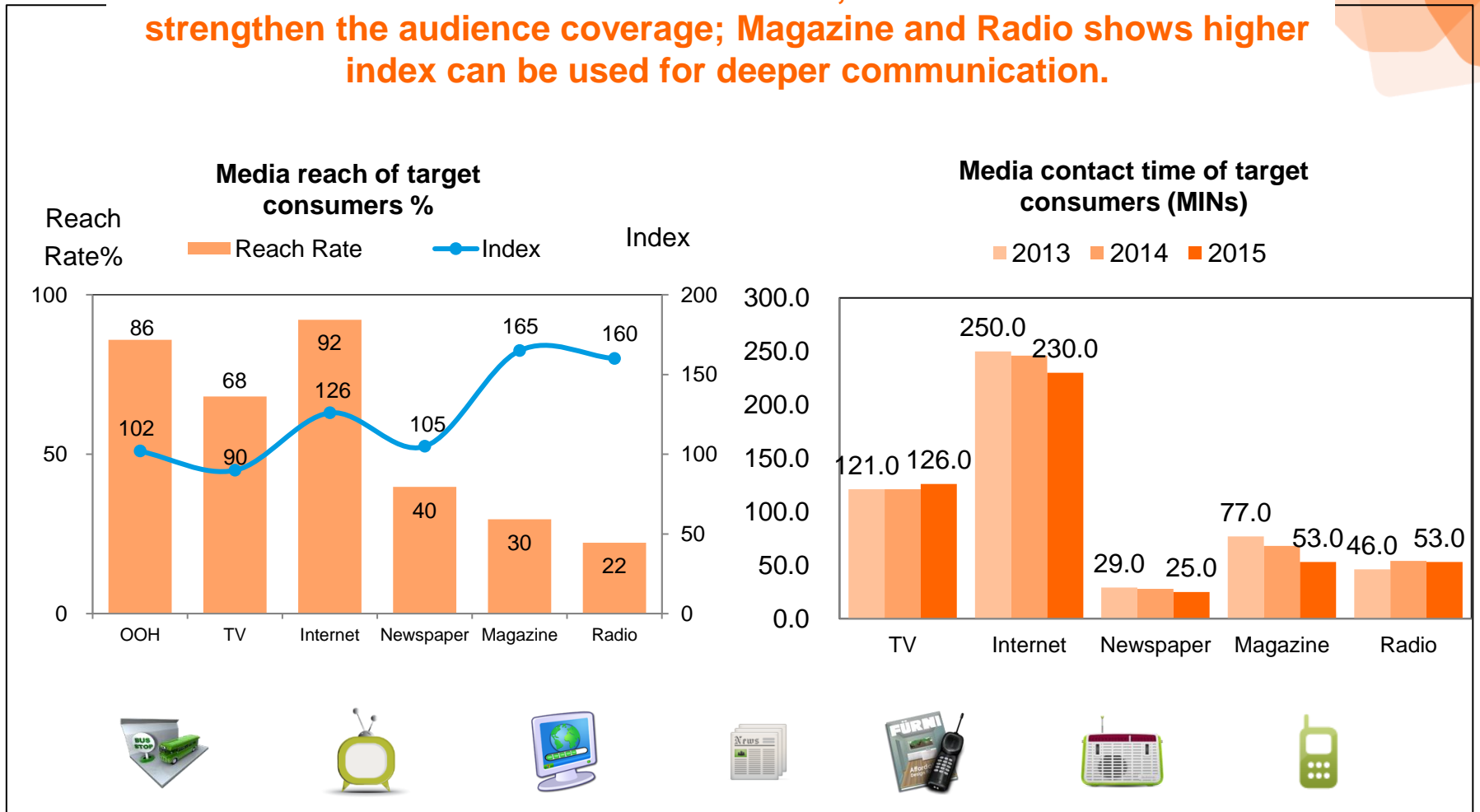
Media Daily Reach/Weekly Reach (%)



Data source: CNRS-TGI 2005-2015

Determine the Right Media Mix by Quantitative Analysis

Media Strategy of Prospective SUV Buyers: Internet is dominant in terms of media reach and contact time; OOH and TV are used to strengthen the audience coverage; Magazine and Radio shows higher index can be used for deeper communication.



Determine the Right Media Mix by Qualitative Media Data Based on Consumer Decision Making Process

Post-80s Prospective SUV Buyer (% , index)

Relationship Between Consumer and Brand

Media Qualitative Indicator



Internet

TV

Newspaper

Magazine

Radio

OOH

Reach Consumer

Media reach rate

96.1%
(102)

78.6%
(99)

59.4%
(99)

22.6%
(101)

40.4%
(103)

91.8%
(98)

Brand Awareness

Channels to obtain car info.

67.4%
(105)

22%
(94)

7.1%
(77)

25.8%
(112)

4.6%
(99)

8.5%
(85)

Brand Preference

Brand advertised in this media leave me good impression

14.8%
(107)

16.9%
(95)

10.9%
(95)

12.2%
(112)

9.6%
(107)

16.6%
(109)

Promote Purchase Intention

Reliable media

15%
(106)

20.4%
(97)

18.6%
(99)

14.3%
(109)

12.6%
(105)

12.2%
(108)

Purchase Action

Media can increase my purchase intention

15.1%
(104)

14.4%
(97)

10.9%
(105)

11%
(115)

8.3%
(99)

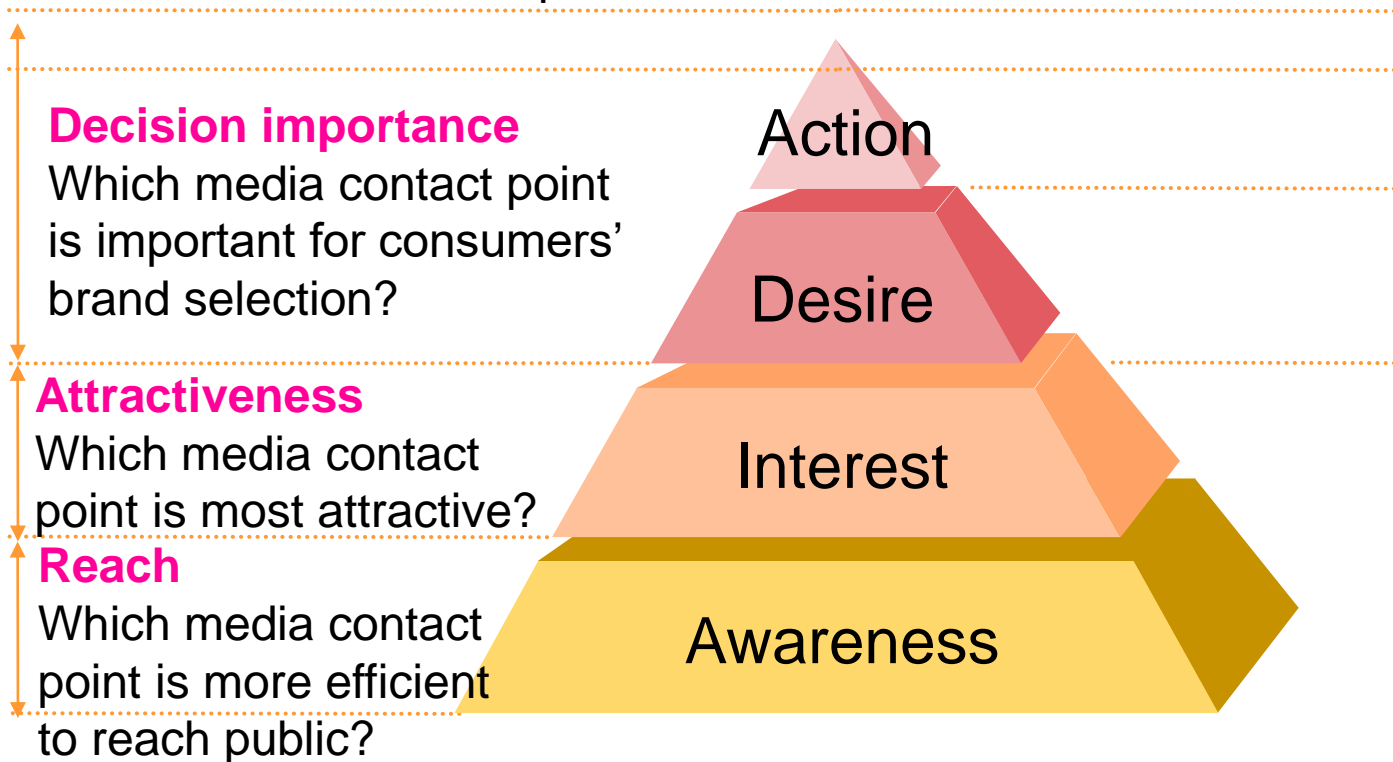
12%
(100)

Data source: CNRS-TGI 2015

Optimize Media Mix Through Media Contact Points Analysis to Identify Potential Contact Points

Association

In which media contact point consumers notice the brand?



Optimize the Variety of Media Through Media Contact Points Analysis to Identify Potential Contact Points

Example
(sample data for presentation)

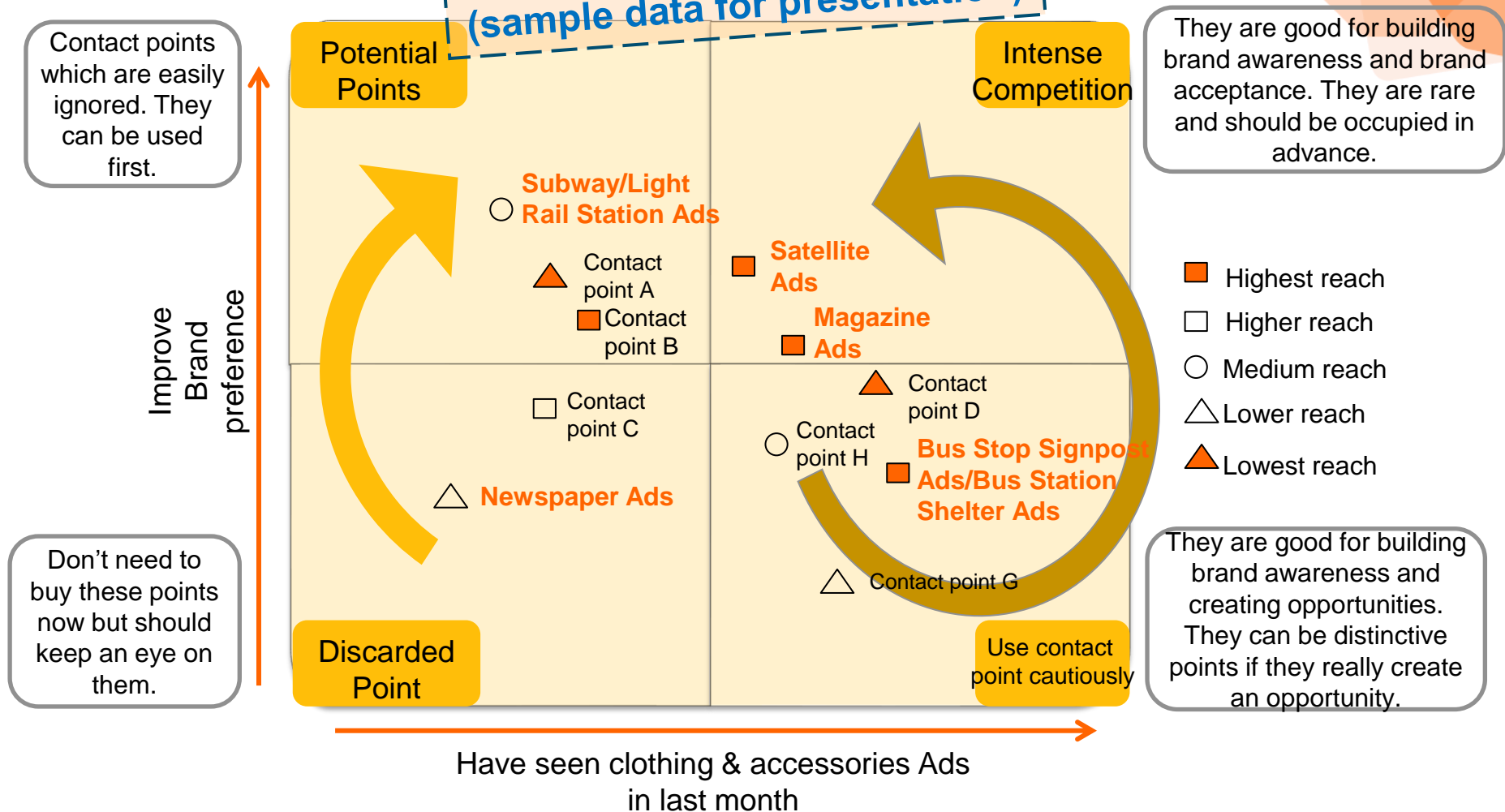


Table of Contents

- ⇒ CNRS-TGI Introduction
- ⇒ CNRS-TGI Research Design
- ⇒ Quality Control
- ⇒ CNRS-TGI Data Values
- ⇒ **Our Clients & Support Services**

We Offer our Clients a Full Support Services



Comprehensive training on database usage



Tailor made annual customer service plan and training plan with emphasis on database usage and applications.

Complimentary periodic TGI global reports



TGI update, data applications and annual research seminar provide clients with insights and global perspective.



Client service team in Beijing, Shanghai and Guangzhou will respond within 24 hours to any customer inquiries on database applications and software usage.

One-on-one professional service to answer any inquires on data

Our Service – Introduction Training

- **Tailor-made year round service plan and trainings on software and database application.**

Training Programme

- Product intro + basic software training
- Mid-level data application + software training
- Advanced data application + software training



Expecting Results:

- Entry level: Understand CNRS-TGI product and its functions, learn to use software to make crosstab.
- Mid-level: Use CNRS-TGI to define TA and to analyze consumers' media contact habits, consumption habits and lifestyle etc. Learn to use tools of Map/Viewpoint and correspondents etc.
- Advanced Training: Making brand development strategy, media strategy and learn to use cluster etc.

**Introduction
Training**

**Advanced
Training**

**Research
Share**

Introduction & familiarization

In-depth application

Consolidation

Our Service – Advanced Training

- Share with clients the latest research findings and development trend of media and industry.

Training Programme

- Onsite training twice a year after the whole-year database release to share database updates, seminar or industry report.
- Sharing of research findings 1-2 times a year to VIP clients (semi-tailored)
- Media class once a month



Expecting Results:

- Understand the latest trend of media, industry and brands, sharing the data trends and reasons behind.
- Determining the topic with clients and have further discussion.
- Media class is organized by CTR to share the most recent news of CTR products and research findings; it also create an opportunity for clients to exchange knowledge of CTR product and to have further sharing and discussion.

Introduction
Training

Advanced
Training

Research
Share

Introduction & familiarization

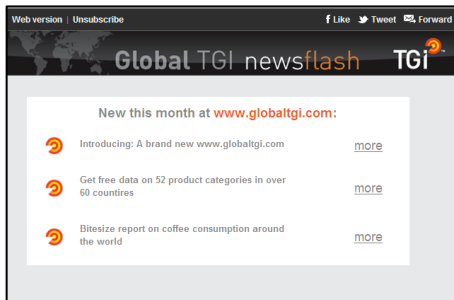
In-depth application

Consolidation

Our Service – Research Share

■ TGI Global Resource – Broader View to Dissect Industry Trends

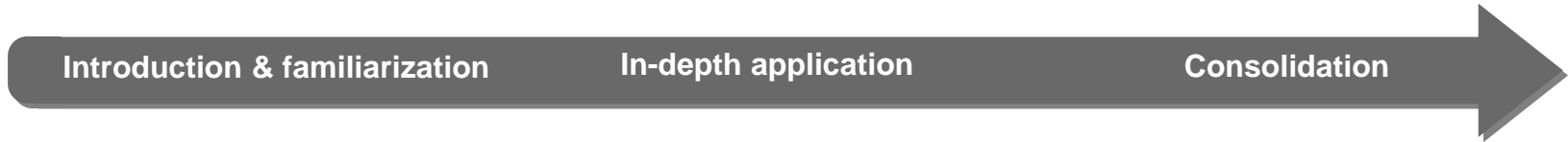
- Global TGI Newsflash
- Global TGI Dispatches
- Global TGI Factoids
- International reports
- Annual Global TGI Product Book
- Global TGI Conference Papers
- Kantar thought pieces and POV



Introduction Training

Advanced Training

Research Share



Our Service – Research Share(Continued)

- Free industry reports related to the client's business(such as sports industry report, mom & baby products industry report, automobile industry report)
- Provide free reports of China advertising market review, all media advertising monitoring & analysis and advertising market forecast etc.

ctr 2015 Advertiser Marketing Trend Report 2015年广告主营销趋势 报告



ctr 2015 China Advertising Market Review 2015年中国广告市场回顾

2015年广告市场简述

总体	• 2015年中国广告市场下降 2.9%
	• 其中，传统广告市场下降 7.2%
媒体	• 电视刊例收入下降4.6%，广告时长减少10.7%
	• 电台刊例收入减少0.4%，广告时长减少13.3%
	• 报纸和杂志的刊例收入分别下降35.4%、19.8%
	• 传统户外刊例收入减少0.2%，广告面积减少7.8%
	• 商务楼宇视频刊例收入增长17.1%
	• 影院视频刊例收入增长63.8%
	• 交通类视频刊例收入下降8.8%
• 互联网广告刊例收入增长22.0%	

主要发现1：



2016中国社交媒体影响报告 KANTAR

社交媒体让我们的生活变得更好了，还是更坏了？

2013年: 73.4

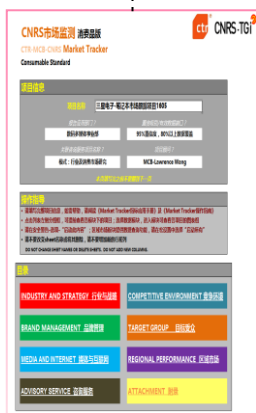
2014年: 68.0

2015年: ?

Our Service – Research Share(Continued) ——Market Tracker

Market Tracker is based on CNRS-TGI data: Background & Values

Customized brand data report



Comprehensive data indicator



Systematic data application training



For Users

• **Marketing Department**



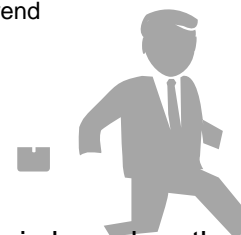
Product development positioning
Brand development plan
Audience value research
Media promotion strategy
.....

• **Business Manager**



Industry development trend
Competitor analysis
Regional market power
Operation strategy adjustment
.....

• **Sales Department**



Competitor activities
Regional marketing activities
Terminal promotion strategy
Dealer service tool
.....

Note: This part of the report can be customized according to client's requirements, the price is based on the number of data used.

Our Service – Research Share(Continued)

——Market Tracker

- **Building enterprise external data system based on consumption**

True Consumer Orientate:

By using comprehensive information from industry, brand and consumers to build a new market oriented data system.



Using comprehensive data to overview business market from six modules

Strategy & Industry

Industry and related industry development, market penetration and growth in the provinces, industry consumer portrait...

Competitive Environment

Brand market share, market competition situation in the provinces, consumer purchase intention trend (durable goods), brand competition...

Brand Management

Brand awareness and preference, brand consumer distribution, brand connotation measurement, Brand tagged.....

Target Audience

Product category consumer and decision makers, their statistical features, lifestyle and consumption description.....

Media & Internet

TA's media contact effectiveness, different media usage habits, internet behavior analysis...

Regional Market

To meet external data requirements of sales manager and regional dealer, provide brief data reports that are based on regional market.....

Note: This part of the report can be customized according to client's requirements, the price is based on the number of data used.

Outstanding Client Service Team

Specialized division of labor

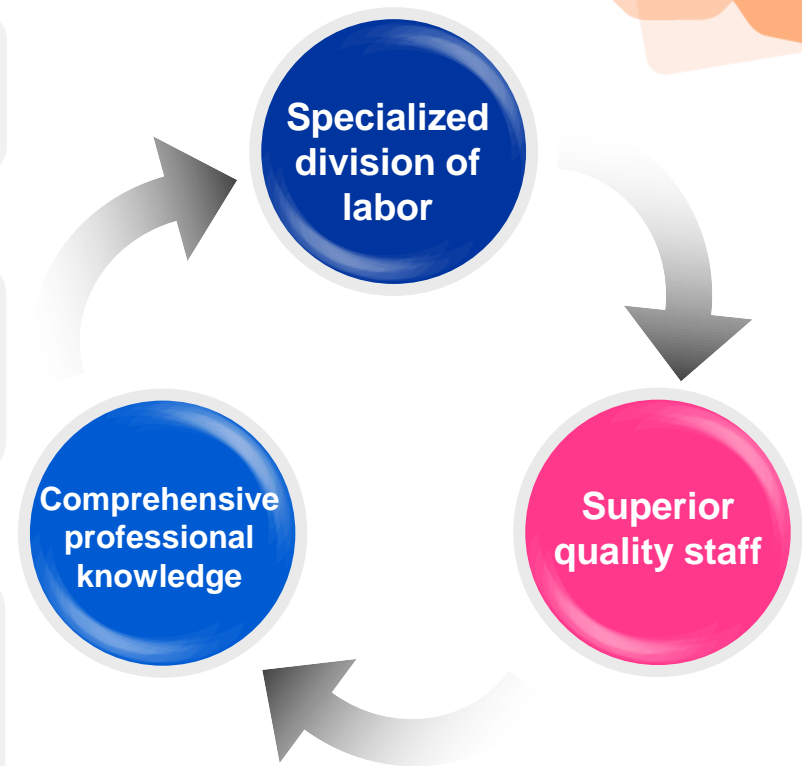
The staff are divided into media teams and advertising teams, so the service can be tailored to meet their individual needs.

Superior quality staff

70% of the client service staff have a master's degree or above; **50%** received overseas education and training; all dedicated to provide the highest level of support

Comprehensive professional knowledge

Client service staff have diverse educational background in communication, advertising, sociology, psychology, statistics, marketing etc. and can provide expert solutions to client problems.





Thank you |

BJ: Michelle Li
limingxia@ctrchina.cn
Tel: 130 3112 8257

SH: Pony Ma
Pony_ma@ctrchina.cn
Tel: 138 1833 7564

GZ: Limin Song
songlimin@ctrchina.cn
Tel: 186 0075 0695



ISO 9001