

Focusing on the sight of TA

Revealing the truth of transmission efficiency through the eye tracking techniques

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Macro Economy Data of Q4 2016 China

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How to Select the Right Celebrity Endorser?

According to the analysis of Ipsos Connect advertising database, 40% of the ads have used spokespersons. The analysis of over 2300 pieces of ads in pre-testing database indicates **that ads with a star spokesperson have slightly higher ad recall and persuasiveness index than those without**, which is also consistent with our common sense that "Stars are eye-catching."

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Reflection on Olympics Marketing: Ad Performance Evaluation

Olympic sponsorship tracking launched by Ipsos Connect involves multi-angle and timely research on enterprises' sponsorship, their marketing activities, the impact on their brand sales and promotion.

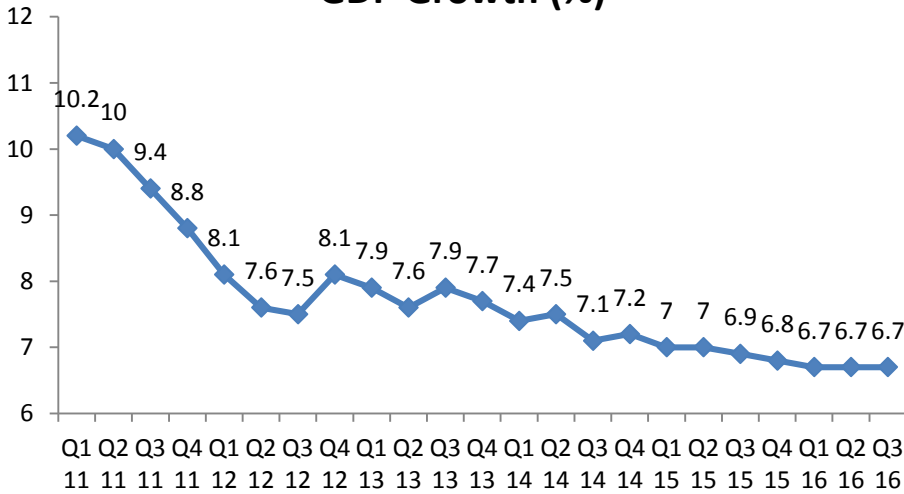
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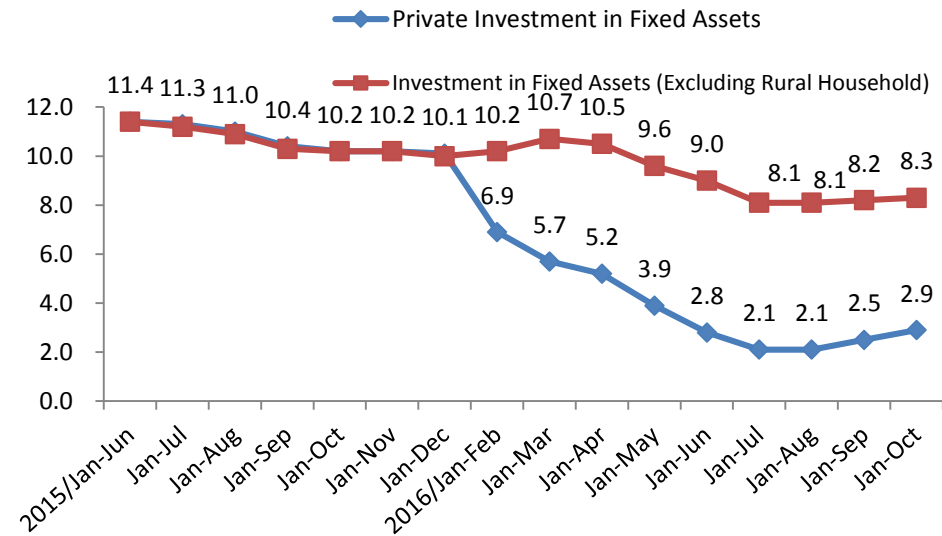
Contact: Lu.peng@ipsos.com

China's economy showed moderate but steady growth with a year-on-year GDP increase of 6.7 percent at comparable prices in Q3 2016

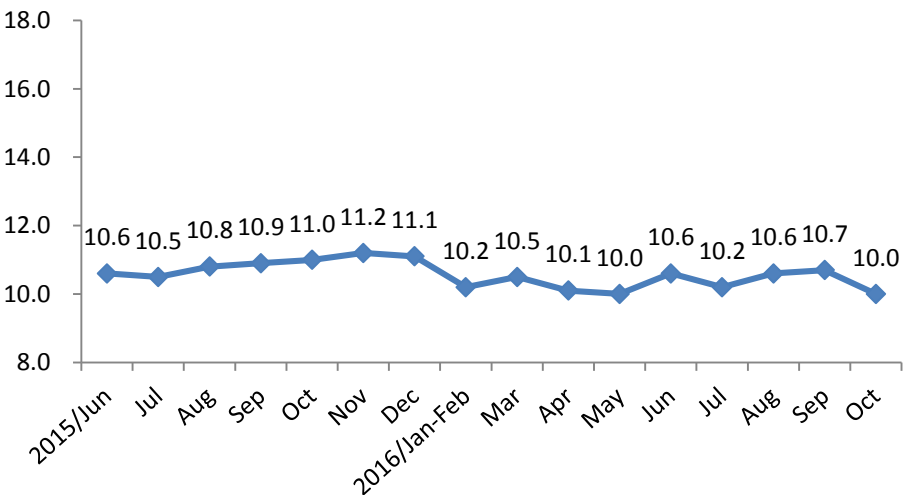
GDP Growth (%)



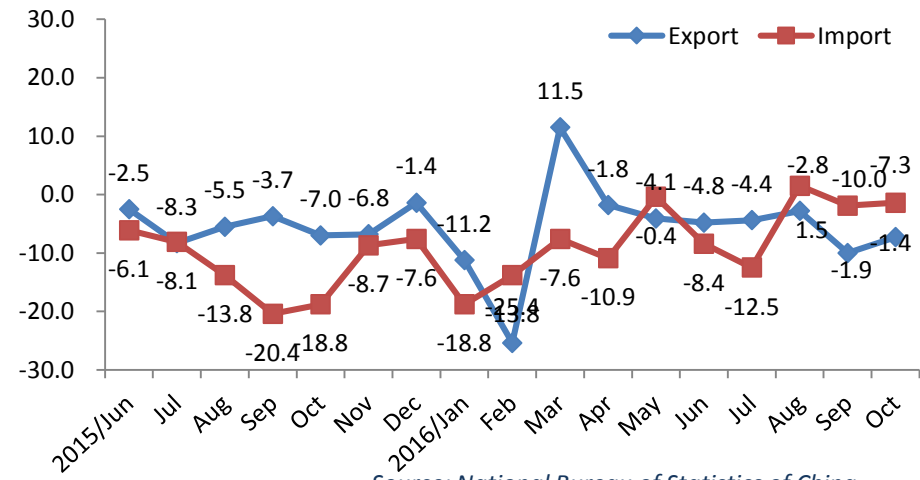
Fixed Assets Investment YOY Growth (%)



Total RSCG YOY Growth (%)

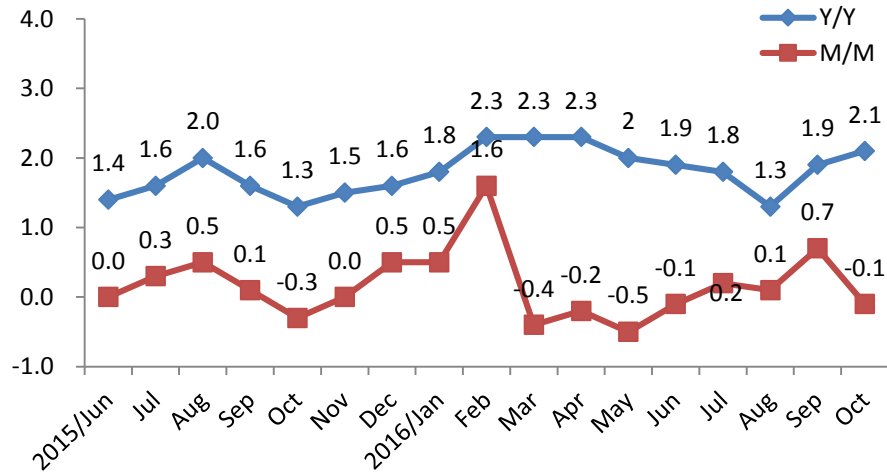


Export/Import YOY Growth (%)

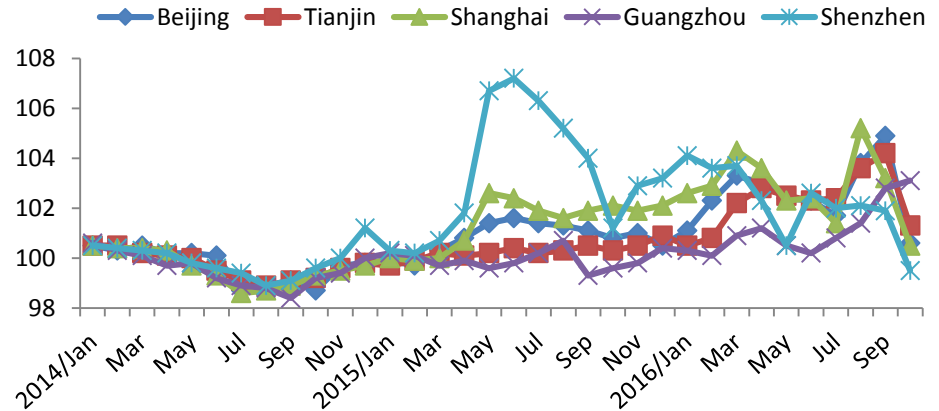


In 2016/Oct., CPI went up by 2.1% YOY, Manufacturing PMI slightly up at 51.7; In 2016/Sept., CCI slightly down at 104.6.

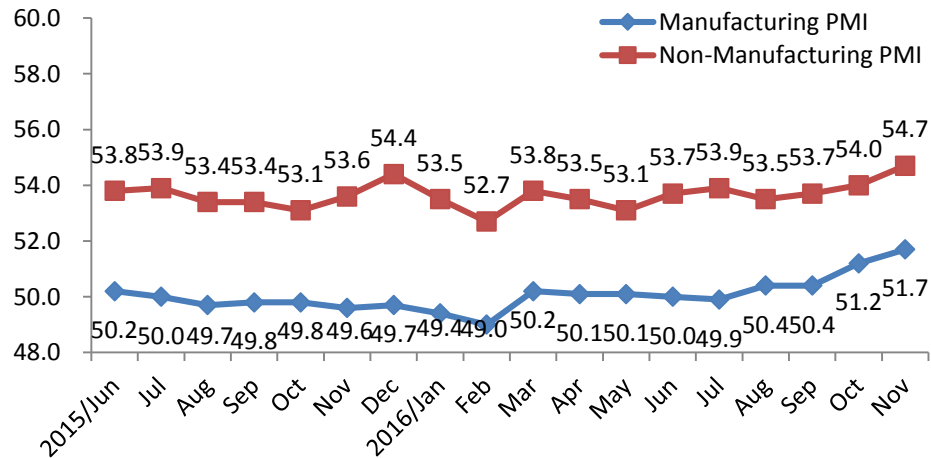
CPI Growth (%)



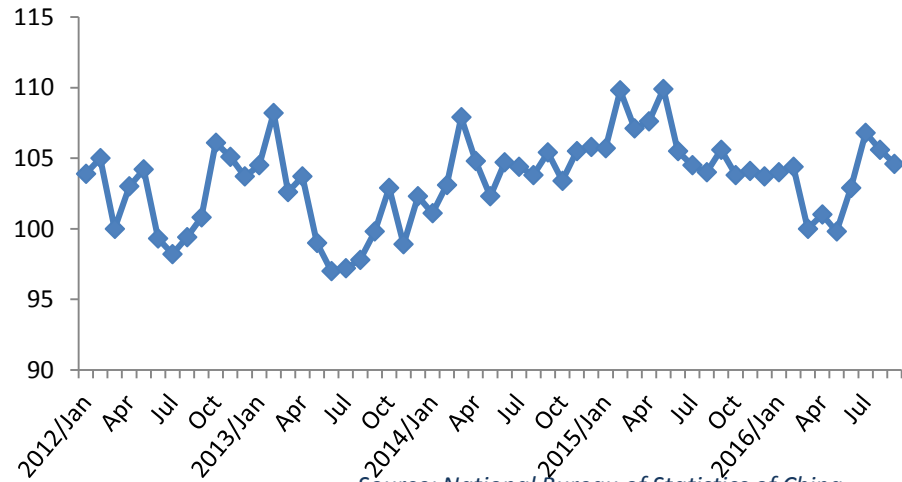
Newly Commercial House Pricing MOM Growth (%)



National PMI



Consumer Confidence Index



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through the eye tracking techniques

By Ipsos Connect China



- 调查 Survey
- 观点 POV
- 产品 Product
- 新闻 News



Situation assessment & Research purposes

In today's world with developed media, we are facing great challenges when trying to measure the impacts of marketing, advertising, creative ideas and POS publicity materials. In the digital and outdoor environment (cross-channel advertising), it is more difficult to accurately assess the real behaviors of consumers.

Many clients are very eager to understand consumers' media consumption characteristics/habits, their relationships with different media channels, as well as marketing communication in those channels; especially in such a fast booming digital environment, to learn about the ideal way to display ads/show brands and to understand the effects of different media (during the course of consumers' shopping) on people of different generations are always essential.

In the report, consumer behaviors in the Chinese media world are tracked by revealing the contents that consumers come into contact with in daily life and the attention they paid. As the world's leading brand research institution, Ipsos can help you find the potential parts in your creativity and communication process and those can increase the potential with the new "eye tracking" techniques and methodologies. We share our knowledge with clients, to show Ipsos' leading expertise of providing insights in the field of "eye tracking" research.

Main research results



TV is still the main touchpoint that attracts consumers, while digital media (especially online video) is in rapid rise.



Outdoor media has a strong performance in display, but has little attraction.



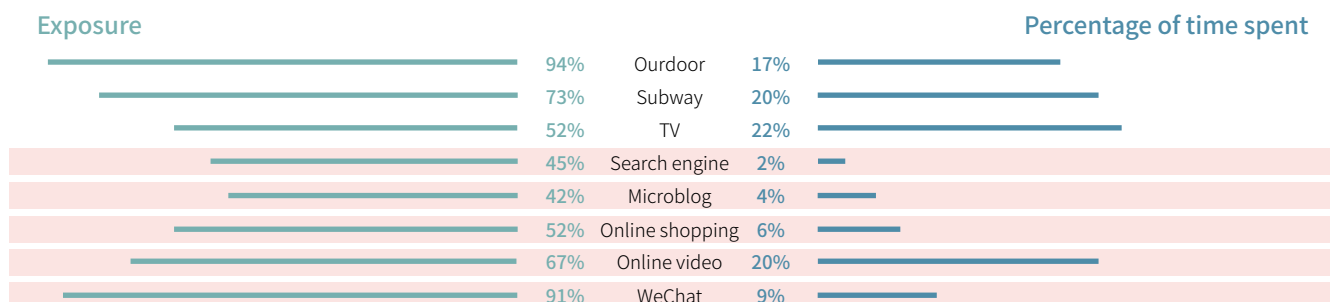
Subway has an important position in the daily life of consumers (strong display performance and high attraction).

Which one is better in advertising?

We are all consumers, and everyday we are surrounded by a great many of choices.

There are so many things around your target consumers, such as WeChat, outdoor advertising, TV, online video, and so on, it is not easy to get their attention. So, can our advertising impress TA?

According to Ipsos research, in the everyday life of consumers that we recorded, **although consumers come into contact with more and more digital touchpoints, the attention obtained from TV, outdoor and subway and other touchpoints is still high.**



TV advertising vs. Online video advertising

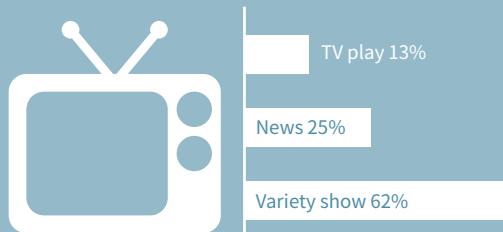
We found that, **although online video is flourishing, consumers still spend more time on TV.**

The research shows that the time consumers spend on TV (22%) and online video (20%) is about the same. In terms of content, we found some differences - consumers mainly watch variety shows (62%) and news (25%) on TV, while watch drama series (42%) and variety shows (55%) through online video media.

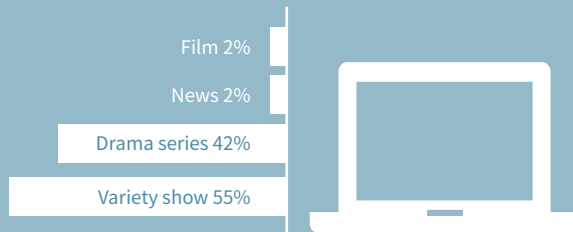


Source: Ipsos/Tobii Eye Tracking Market Research

TV Time spent %



Online video Time spent %



数据来源: Ipsos/Tobii 眼动追踪调研

Attention % = the time that consumers spend on the media of TV or online video / the total time spent on TV or online video.

In view of the fact that TV is a more focused media environment, it is not surprising that consumers are more likely to watch TV advertising.

The research shows that the opportunities that consumers are exposed to TV advertising are about 3 times that of online video advertising. Therefore, for brand owners, recognition and recall are more important than mere presentation; the advertising is the most convincing/influential among people who are the most consciously aware of it.

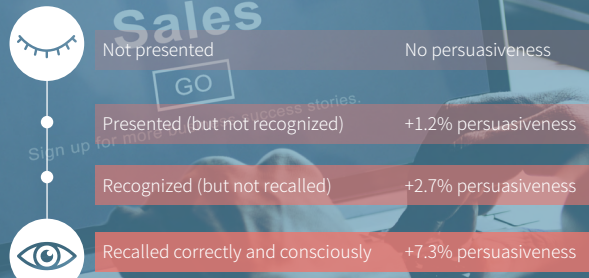
Opportunities that consumers are exposed to advertising %



Source: Ipsos/Tobii Eye Tracking Market Research

Opportunities that consumers are exposed to advertising % = length of TV ads/online video (pre-roll ads)/total time spent on TV or online video.

Persuasiveness From 500+ ad testing



Advertisers should pay more attention to the impact of recall instead of OTS

In addition, through dividing the total length by the time consumers spent on ads with their eyes staring on it, the opportunities that consumers focus on TV ads are twice that of online video ads (pre-roll ads)! In terms of concentrated attention, TV advertising (31%) still wins! Although many advertising campaigns have turned to network now, we still want to remind the brand owners it is hard to attract consumers' eye-balls in the network environment.

Attention



Source: Ipsos/Tobii Eye Tracking Market Research

Attention=length of time that consumers pay attention to TV ads or online video pre-roll ads/the total length of time of any form of advertising on TV or online video.

Creativity is still the key, which is more important to online video ads!

Only in this way can let the brand eye-catching ability become more prominent.

With or without celebrity endorsement

Celebrity endorsement is no longer something new, but with the rise of mobile + social network, more and more work needs to be done behind celebrity endorsement.

We found that, most of the ads that attracted attention in our eye tracking research were all endorsed by celebrities. Celebrities can help increasing attention, to be sure. But it is worth noting that celebrities could disperse the attention to brands, leaving negative influence on advertising.

Celebrity endorsement is a double-edged sword, making good use of it is the key.

Hot TV ads

Hot pre-roll ads

Most TV ads that attract high attention are endorsed by celebrities

All of the five online video pre-roll ads are endorsed by celebrities

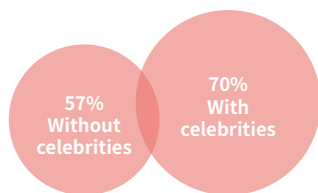
	Tmall	First
	OPPO	Second
	KFC	Third
	Inoherb	Fourth
	Bishengyuan	Fifth
	Head & Shoulders	Fifth

Chcedo	OUYANG Nana	First
Magnum	GAO Yuanyuan	Second
L'oreal	JING Tian	Third
Clear	Cristiano Ronaldo	Fourth
Tenwow	HUANG Xiaoming	Fifth

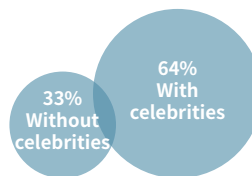
Source: Ipsos/Tobii Eye Tracking Market Research

Sure that celebrity can help to drive attention.

Attention on TV ads



Attention on online video ads (pre-roll ads)



Source: Ipsos/Tobii Eye Tracking Market Research

Attention=length of time that consumers pay attention to TV ads or online video ads (pre-roll ads)/total advertising time of TV ads or online video ads (pre-roll ads).

Sponsorship opportunities

Programme sponsorship is the hottest way at present; we know that there are more and more variety shows, and more and more embedded ads, and more and more sponsorships.

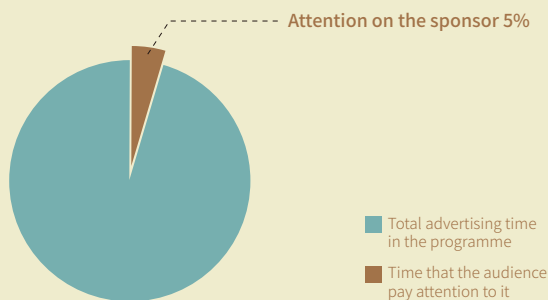
Are they helpful? We might want to pour cold water on this.

Sponsorship is not very effective in raising awareness no matter where people watch the ads, but the sponsorship for a major programme by multiple sponsors may enhance the attention.

Consumers may not pay attention to, or pay little attention to sponsorship because of something you did. In programme sponsorship, you can see many forms of ads, for example, a beautiful lady holding your product, or a product on the host table, even the static display of the brand LOGO on the table.

The research shows that dynamic embedding of product (11%) can attract more consumer attention than static display of brand LOGO.

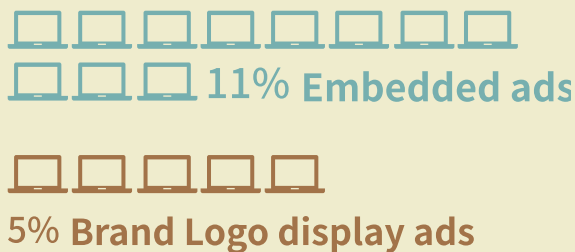
Reality show SPONSORSHIP seems the hottest choice, but does audience really pay that much attention to the sponsor?



Source: Ipsos/Tobii Eye Tracking Market Research

Attention %=length of time that consumers pay attention to sponsorship ads/ total length of time of sponsorship ads

Product placement is better than simple brand logo display.



Source: Ipsos/Tobii Eye Tracking Market Research

Attention=length of time that consumers pay attention to each form of sponsorship ads/total length of time of sponsorship ads

Engaging consumers is more important than ever before

Outdoor advertising vs. Subway advertising

Compared with the outdoor (17%), consumers spend relatively more time in the subway (20%). Obviously, compared with outdoor advertising (12%), consumers are more likely to pay attention to subway ads (36%), especially when they enter the station (34%) and wait for a train (20%), where the chances for them to see ads are higher. In addition, the research found that LCD display advertising can attract more attention than static billboards, dynamic advertising is easier to gain attention.

Consumers have more time being exposed to Metro compared to outdoor environment.



Source: Ipsos/Tobii Eye Tracking Market Research

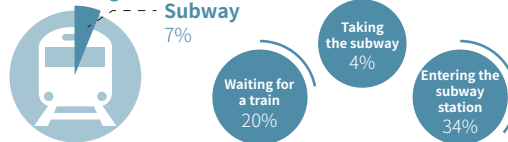
Metro ad attention rate is 3 times more than outdoor ads.



Source: Ipsos/Tobii Eye Tracking Market Research

Attention % = length of time that consumers pay attention to ads / total length of time of ads

Opportunities that consumers are exposed to advertising %



Source: Ipsos/Tobii Eye Tracking Market Research

Opportunities that consumers are exposed to advertising % = total length of time of subway ads in each area / total length of time that consumers stay in related subway area



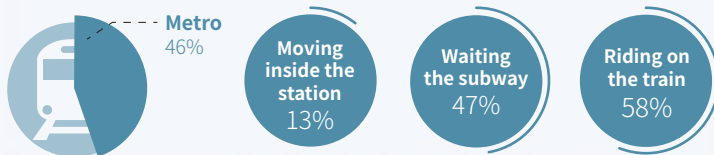
Source: Ipsos/Tobii Eye Tracking Market Research

Attention = length of time that consumers pay attention to various ads in each subway area / total length of time of various ads in each subway area



Admittedly, consumers spend most of their time on the subway trains. However, more than half of their time (46%) is occupied by mobile phones (most of this kind of circumstance happening during taking the subway trains). This kind of circumstance often happens especially when they are waiting for subway trains (47%) and taking the subway trains (58%).

Percentage of time spent on mobile phones %

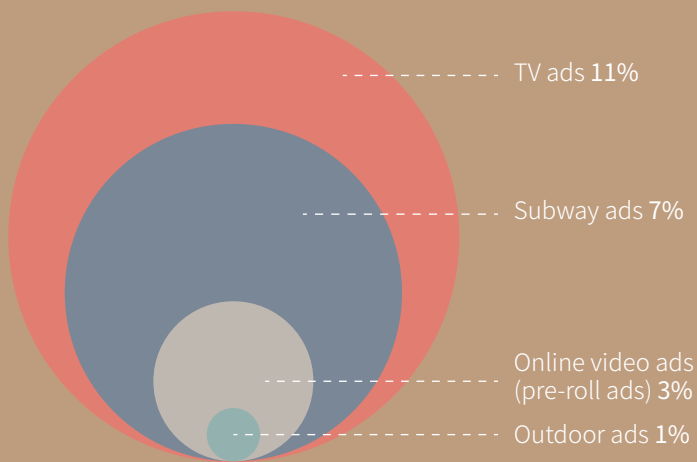


Source: Ipsos/Tobii Eye Tracking Market Research

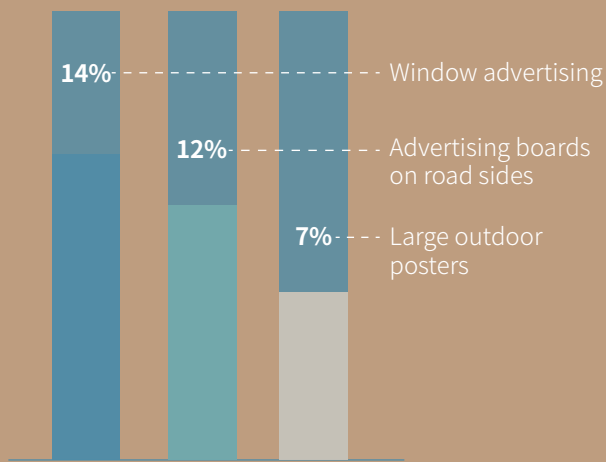
Percentage of time when the attention is distracted by mobile phones % = time that consumers spend on mobile phones in the subway / total time in the subway

The outdoor is the last real media - everyone will go outdoors! However, consumers pay the least attention to outdoor advertising, with only 1% of consumers paying attention to outdoor advertising. Also because of this, outdoor advertising has to be creative enough to give consumers impression quickly! By contrast, in outdoor advertising, window advertising can obtain relatively more attention (14%).

Opportunities that consumers are exposed to advertising %



Attention %



Source: Ipsos/Tobii Eye Tracking Market Research

Source: Ipsos/Tobii Eye Tracking Market Research

Opportunities that consumers are exposed to advertising % = total length of time of ads in each media / total length of time that consumers spend on each media.

Attention % = length of time that consumers pay attention to various outdoor ads / total length of time of various outdoor ads

The above research results are worth us to ponder:

although digital media advertising becomes increasingly prosperous,
TV advertising still does not give in.

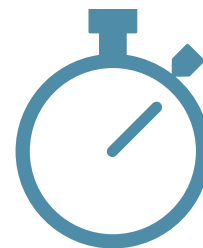
**Sufficient media spending shall be ensured for TV advertising,
in order to improve recognition and purchases.**

Given the chance of being watched is low and the probability of being ignored is high,
online video ads (pre-roll ads) are more dependent on more powerful ideas,
to contact and attract consumers.

Eye-catching visual effects can help people better pay attention to outdoor ads,
and the ads can be more powerful through the combination
with TV or other comprehensive elements.

As consumers often look at their mobile phones when taking the subway trains,
**more attention can be obtained through
making better use of the LCD ads in the passageways/waiting areas.**

An ad is usually 15 seconds or 30 seconds, and a brand does not want to waste any second of time; it hopes to attract the attention of consumers in the very beginning; hopes that the story, creative plots can be correctly understood; hopes the consumers can watch it from beginning to end; hopes the ad serves not the ad, but the brand, and hopes the ad can drive the consumers attitude and behavior to the brand.



“Being broadcast does not mean being received!”

Attracting consumers to watch an ad is very, very important, and will become increasingly important. After the accumulation of some experience, Ipsos clearly feels that good and creative advertising is better in emotional engagement, emotional resonance than those bad ads; good ads must be attractive. In the past, it can be studied through traditional research that how about celebrities, and how about the story line. Now, with the increasingly fierce competition, we need more subtle ways, and need to understand what the consumers are not saying.

Ipsos, with its leading expertise of providing insights in the field of “eye tracking” research, can help us to understand in today’s media environment which channel and which contents are useful, which are not so optimistic,

**and make the paths and views of consumers
that we could not see clearly in the past
known and predictable!**



For more details,
please contact ipsos_china@ipsos.com

How to Select the Right Celebrity Endorser

By Wang Minmin, Deputy Director of Ipsos Connect GMU

Rio Olympics has just ended, but the craze on Olympic athletes has not yet faded. However, do you know that the microblog comments of “Wang Baoqiang Divorce” (10 billion pieces) once surpassed that of “Rio Olympics” during the Olympic Games? It is unprecedented that celebrity gossips should take away the limelight of the Olympic Games. Moreover, Chinese swimmer Fu Yuanhui’s exclamation that “I have swum up to my potential” and the news on Ma Long and Zhang Jike, rather than the number of gold medals China won in Rio Olympics, became an Internet hit.

In a time overwhelmed with entertainment and socializing, the public pays far more attention to celebrities and stars than ever. Naturally, smart marketing experts never allow to let any opportunities go. While hyping these hot topics, they would always bring forth their own brands or LOGO as an effort of propaganda.

Now, it's time for us to calm down and reflect upon this question: how to select the right star spokesperson in marketing activities to maximize marketing results?

Will stars and celebrities in an ad contribute to its performance?

According to the analysis of Ipsos Connect advertising database, 40% of the ads have used spokespersons. The analysis of over 2300 pieces of ads in pre-testing database indicates **that ads with star spokesperson have slightly higher ad recall and persuasiveness index that those without,** which is also consistent with our common sense that “Stars are eye-catching.”

Ad recall index



Ad persuasiveness index



It doesn't mean that stars contribute little to ad performance. Rather, to ensure the success of an ad, they need to try more hard. It is no longer a time when a charming smile of stars can capture the hearts of consumers.



How to select a suitable "star spokesperson"?

A star is usually the spokesperson of multiple ads or categories. Therefore, you should be cautious and try not to “busy yourself but merely benefit others” when choosing a star as your spokesperson. Then, what are the standards for selecting the right spokesperson?

- ① Compared with the popularity of the star, one thing is more important: whether the star fits the brand. A better fit can lead to better performance of the ad.
- ② In general, to be a good story, the leading role must be played by the brand, rather than the star him/herself. Instead of taking away the limelight of the brand, the star in the ad will “serve” the brand.
- ③ The popularity and recognition of a star vary with areas in China. Therefore, prior to choosing the right star, a brand needs to know how popular the star is in the target area.
- ④ The negative news or word of mouth of the star spokesperson will directly harm the brand image. So, the reputation and image of a star is essential!

Want to know which “stars” are your target audience’s favorite “spokespersons”? Ipsos Connect RAPP star index will surely be helpful to you.

Who are better, stars at home or abroad?

When looking for a spokesperson, many advertisers may encounter such a problem: Should I choose a star at home or abroad? Actually, one can not make simple judgment as regards the nationality of the star, as the nationality of many “domestic” stars is no longer China (just kidding).

Let us look at the database analysis first:



Recognition



Popularity



How he/she fits the brand



How he/she influences views on the brand

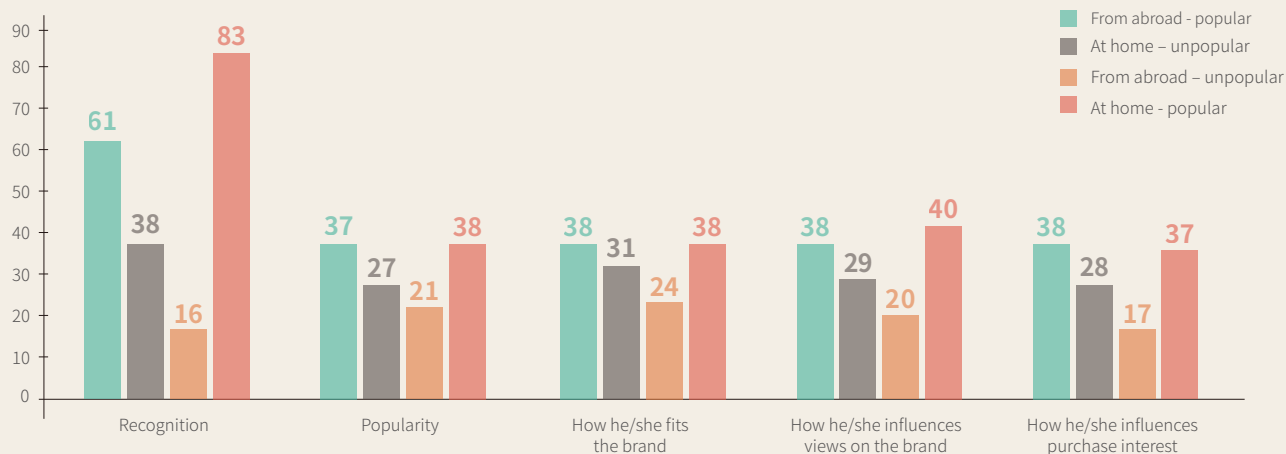


How he/she influences purchase interest

- Foreign star
- Chinese star

As can be seen from the table, except for the gap in star recognition, namely, 16%, there is no significant difference in other pairs of KPI.

Next, let us take the perspective of "popularity":



(Usually we consider popularity lower than 40% to be unpopular, and higher than 70%, popular)

The comparison shows that low popularity goes hand in hand with considerably lower recognition, how the star fits the brand, his/her influence on views of the brand and purchase interest than high popularity. However, the KPI (except recognition) of popular stars varies little with nationalities, indicating that nationality is not that essential in the selection of a star spokesperson.

Will "high-profile" spokespersons be a guarantee of "sales" ?

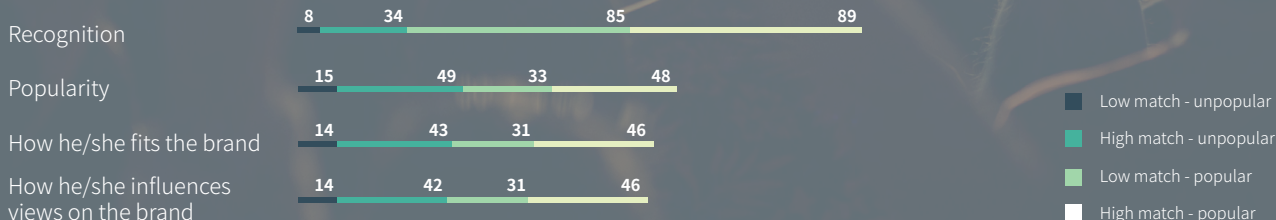
We know from above that nationality is not so important in the selection of a star spokesperson as "popularity".

Then, will "high-profile" spokespersons be a guarantee of "sales"?



The table reveals that the KPI of "high-profile" spokesperson is obviously higher than those "unpopular" ones, which also proves our common sense. But it does not mean "high-profile" is a "guarantee" to all!

KPI



When including "how star fits brand image" (hereafter referred to as "match"), we find that "popularity" is not the most important consideration.

In case of low match, the performance of the ad can also be greatly reduced, even with high-profile star as the spokesperson.

Actually, it may even be lower than that with "high match - unpopular" stars. However, the performance of the ad can be equally good, be it with "popular" or "unpopular" star spokesperson, as long as they are "high match". This is quite different from what we would always believe.

Our original question is whether "high-profile" stars are a guarantee of sales, however, given the difficulty to quantify the sales of different sectors and categories, the varied demands of a brand for spokespersons at different stages (to boost sales in a short period time, to perfect brand image, or to be more visible), as well as the different prices of endorsement, please notice that we can not simply define "a guarantee to sales".

About Ipsos RAPP index:

Ipsos Connect Chinese team has launched RAPP index to assess the emotional driving capability of each candidate spokesperson from the aspect of recognition, attraction, presence and polarization. Through RAPP index, we can see the "List of Stars" in people of different genders, ages, income, and from different cities and occupations.



Recognition

Do they know who he/she is?



Attraction

Do they love it or hate him/her?



Presence

Do they have an opinion about him/her?



Polarization

Does everyone love or hate him/her?

Reflection on Rio Olympics Marketing:

Ad Performance Evaluation From Ipsos Connect China

Ipsos Connect China

Event marketing has been proved to be very effective by many enterprises, and Olympics in particular, as the world's most famous sports event, has unmatched marketing value either to sales or brand building and enhancement, as was proved by Yili, Lenovo, and Coca Cola during the 2008 Beijing Olympic Games. Though the 2016 Olympic Games are to be held in Rio de Janeiro, it will have worldwide influence. Many Chinese enterprises sponsor Chinese Olympic Committee and Chinese athletes to show their support to sports undertakings in China and also to promote their own brand to a higher level.



Survey



POV



EFM



News



Olympic sponsorship tracking launched by Ipsos involves multi-angle and timely research on enterprises' sponsorship, their marketing activities, the impact on their brand sales and promotion. The research will last from February to August 2016, during which accurate surveillance will be conducted to sponsors' online marketing campaigns.

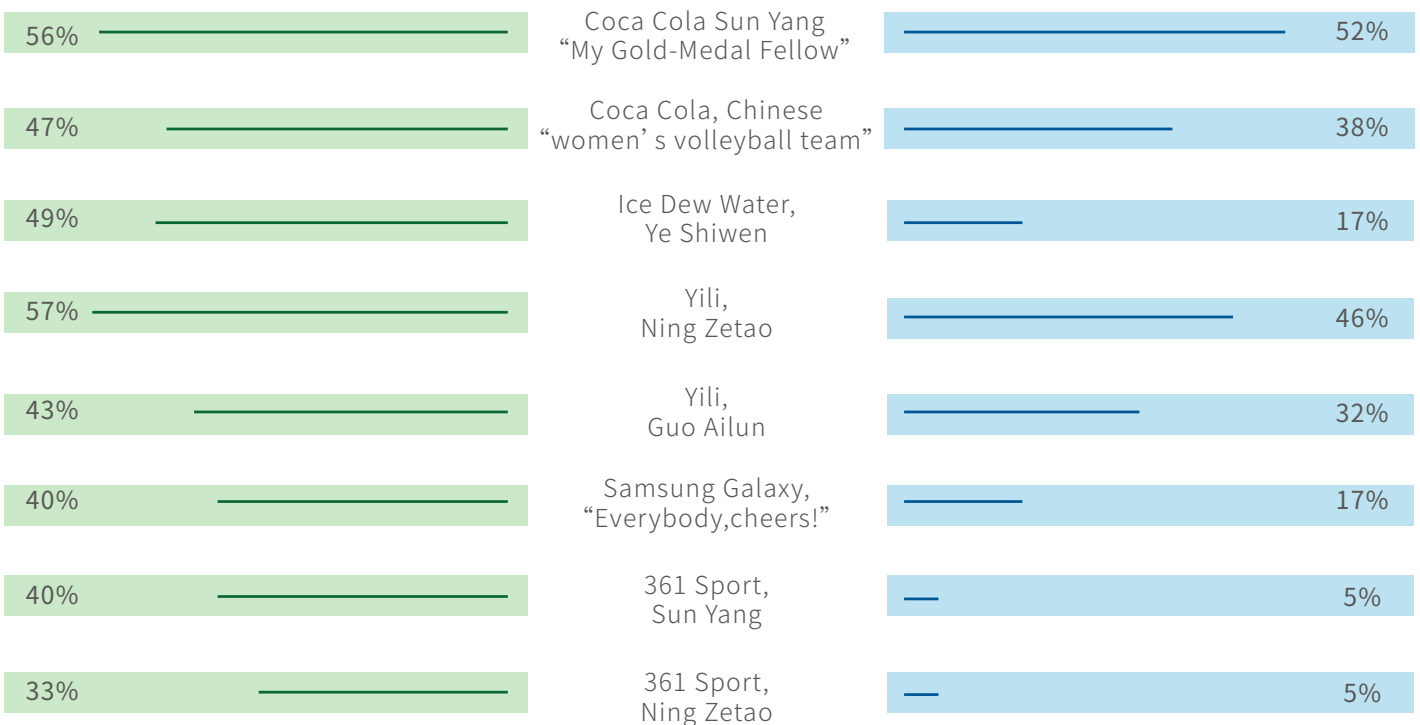


Ad performance analysis

The overall cognition and brand association of Coca Cola and Yili's Olympic ads are rather good. Despite the good overall cognition of Ice Dew Water and 361 Sport, their brand association is low.

Overall cognition

Accurate cognition



Coca Cola

As the new packaging hits the shelves, Coca Cola has launched "My Gold-Medal Fellow" and "Golden Moment" campaigns on TV and on the Internet.



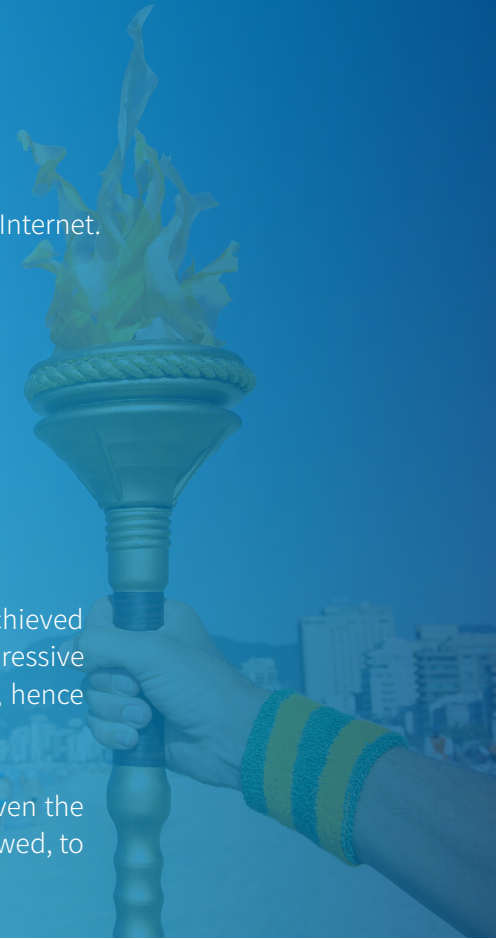
Coca Cola maintains its upward momentum in Olympic marketing.



Its marketing activities not only enhances the association of its brand and the Olympics, but also considerably improves consumers' purchase intention.

"My Gold-Medal Fellow" that features a cute pet and the sports star has achieved good brand cognition and association. The unique design of the ad is impressive visually, and deepens the connection of the brand and people's daily life, hence more emotional involvement in the brand.

Coca's Ice Dew Water also receives good advertising cognition. However, given the limited awareness of the brand itself, the glory of sports stars has overshadowed, to some extent, the role of brand in advertising communication.



Coca Cola:
Sun Yang, "My Gold Fellow"



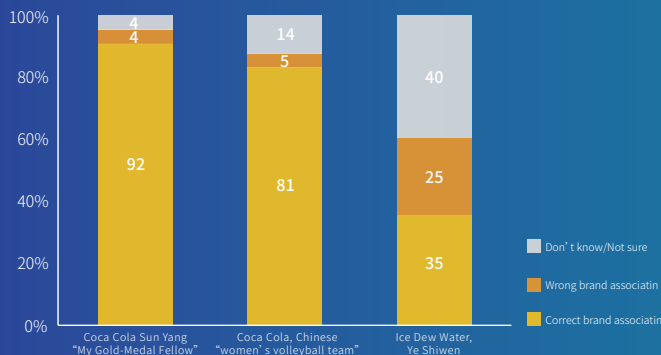
Coca Cola:
Chinese women's volleyball team



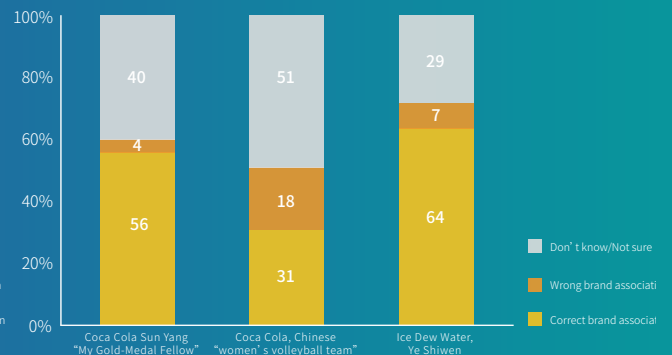
Ice Dew Water:
Ye Shiwen

Both the two ads of Coca Cola have achieved good brand association. Despite the high cognition of spokesperson, more efforts should be made to strengthen brand communication of Ice Dew Water.

Brand association



Spokesperson cognition



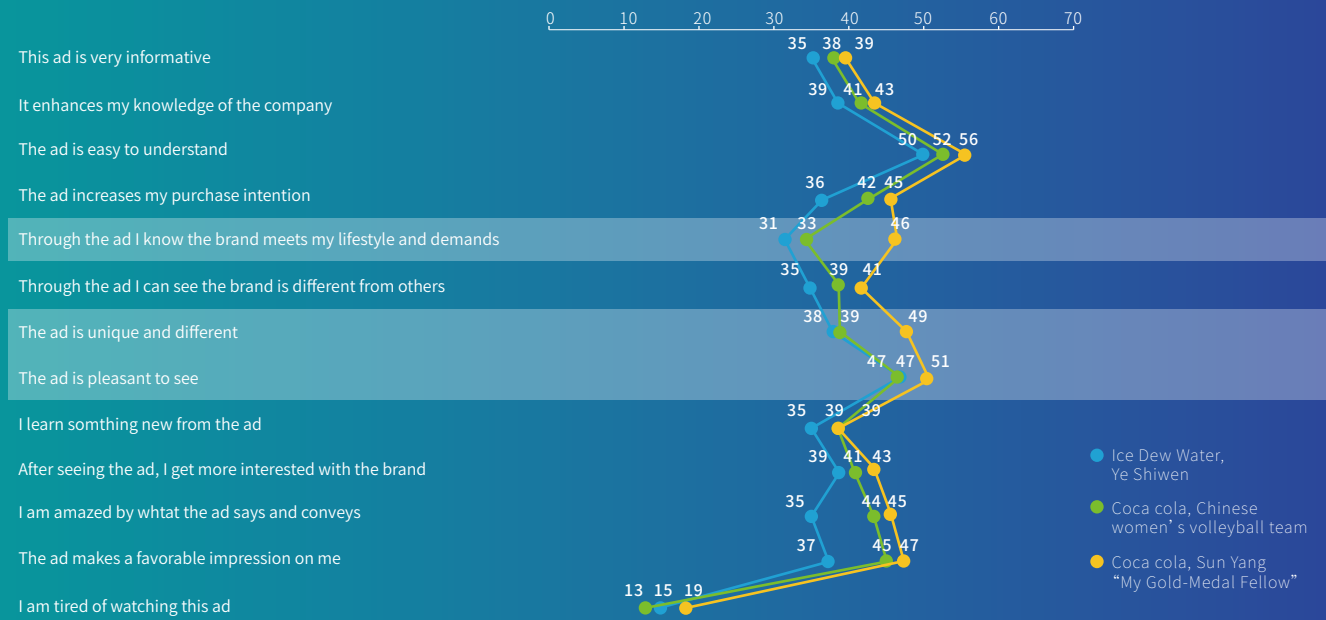
Base: Respondents having seen specific ad

C11-C19: Have you seen this ad recently?

C21-C29: Do you know the advertising brand?

Coca Cola's "My Gold Fellow" is distinctive, delightful, and very close to consumers' lifestyle and demands. The ad that starring Chinese women's volleyball team furthers this pleasant feeling.

Detailed evaluation (strongly agree%)



Base: Respondents having seen specific ad

C31-C39: How do you agree with the following statement on the ad? (Single choice)

"My Gold Fellow" and "Golden Moment" of Coca Cola before the opening ceremony deepens the connection of the brand and people's daily life, hence more emotional involvement in the brand.

Influence to Coca Cola brand image



Base: Respondents aware of the Rio Olympics and the brand A5. Here are some descriptions of brand image. Please look at each description and tell me which enterprises you think it appropriately describes. You can choose one or more brands for each description, or none of them. (Multiple choice)

Yili

Yili also releases its new packaging for milk in its Olympics campaign, as well as the thematic ad, “Be energetic, and it is your day”, on TV and the Internet.



The marketing activity has contributed to the steady upward momentum of Yili’s overall sponsorship index.



It not only furthers the brand reputation, but also encourages more people to purchase products of Yili.

The ads that star Ning Zetao and Guo Ailun are rather consistent in creative, and the scenarios are delightful and easy to understand. Both have achieved good consumer awareness. Besides enhancing the relevance of the brand and everyday life, the ads also encourage consumers to make better choices in their daily lives.

There are still some audience that mistakenly associate the ad with its competitor Mengniu.

Of the two new spokespersons, the popularity of Ning Zetao is much higher than Guo Ailun, so the ad starring Ning Zetao has better boosted consumer interest in the brand and products.



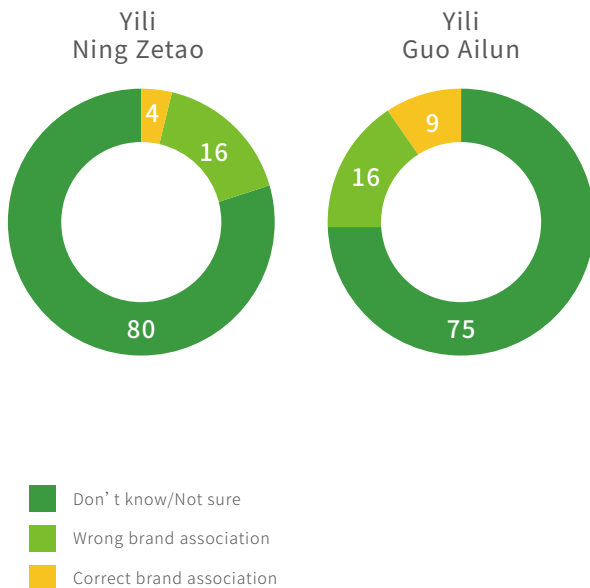
Yili
Ning Zetao



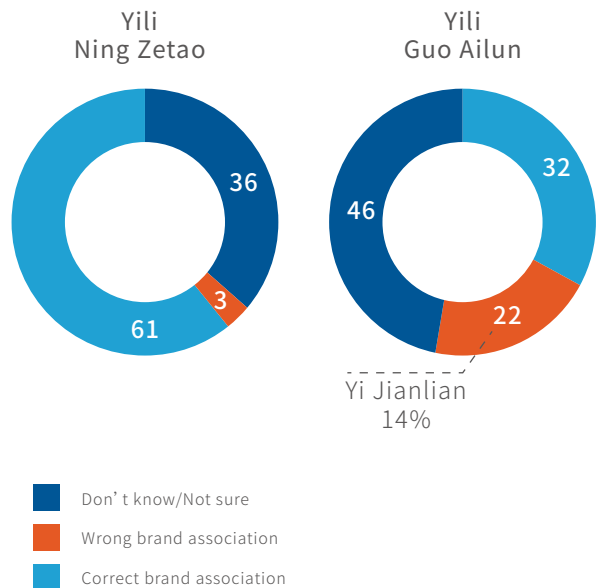
Yili
Guo Ailun

Both ads of Yili have achieved strong brand association, but still some respondents mistake it for Mengniu. Of the two spokespersons, the popularity of Guo Ailun is a little lower.

Brand association



Spokesperson cognition



Base: Respondents having seen specific ad

C11-C19: Have you seen this ad recently?

C21-C29: Do you know the advertising brand?

The ads that star Ning Zetao and Guo Ailun are rather consistent in creative, delightful and easy to understand. The one with Ning Zetao has better boosted consumer interest in the brand and products.

Detailed evaluation (strongly agree%)

Yili, Ning Zetao

Yili, Guo Ailun



Base: Respondents having seen specific ad

C31-C39: How do you agree with the following statement on the ad? (Single choice)

Besides enhancing the relevance of the brand and people's everyday life, Yili's two ads of "Be energetic, and it is your day" also encourage consumers to make better choices in their daily lives.

Influence to Yili brand image



Base: Respondents aware of the Rio Olympics and the brand A5. Here are some descriptions of brand image. Please look at each description and tell me which enterprises you think it appropriately describes. You can choose one or more brands for each description, or none of them. (Multiple choice)

361 Sport



361 Sport Sun Yang



361 Sport Ning Zetao



The marketing activities and natural advantages as a sports brand helped 361 Sport gain higher sponsorship cognition and relevance to the Olympics prior to the opening ceremony of the latter.

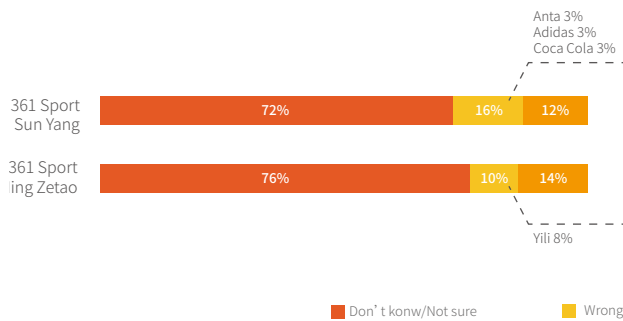


However, given the limitation of communication through advertising and offline activities, its role in promoting brand reputation and purchase intention remain to be seen.

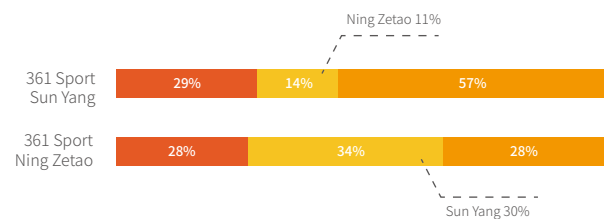
Although the ads starring Sun Yang and Ning Zetao have received certain cognition, despite the limited delivery, the brand and product are not exposed much in both ads, and most of the audience fail to recall the right brand.

Given the similar advertising creative and backgrounds of their spokespersons, the two ads does not generate the effect where 1+1>2; rather, they are confusing (the false cognition rate of Yili's ad that also stars Ning Zetao is much lower).

Brand association



Spokesperson cognition



Base: Respondents having seen specific ad

C11-C19: Have you seen this ad recently?

C21-C29: Do you know the advertising brand?

The two ads of 361 Sport pays more attention to the spokesperson. The low exposure of the brand largely affects brand association. Moreover, the overall cognition of Sun Yang is higher than Ning Zetao.

Despite the similar ad creative,
the ad starring Ning Zetao is more delightful to the audience.

Detailed evaluation (strongly agree%)

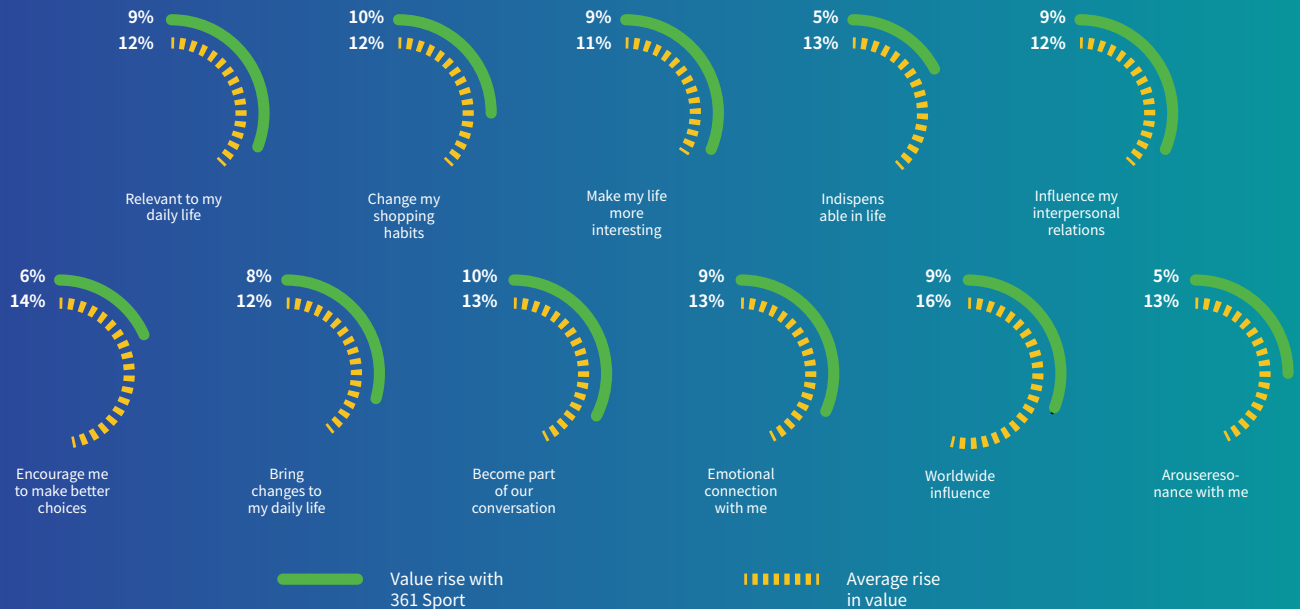


Base: Respondents having seen specific ad

C31-C39: How do you agree with the following statement on the ad? (Single choice)

The effective dissemination of the two ads of 361 Sport is limited,
and instead of making the athletes the center, it should further the
influence of its brand image.

Influence to 361 Sport brand image



Base: Respondents aware of the Rio Olympics and the brand

A5. Here are some descriptions of brand image. Please look at each description and tell me which enterprises you think it appropriately describes. You can choose one or more brands for each description, or none of them. (Multiple choice)

It has been sometime after the Rio Olympics,

but the reflection on Olympics marketing will continue.

What are our expectations for Tokyo Olympics in 2020?