



Mannings TV Network Research

***(an exclusive media partnership between
Mannings and Focus Media Hong Kong)***



Study of In-store TV Advertising Network

Presenting to

FOCUS MEDIA HONG KONG

iMediaHouse

Combining Venture Capital and Entrepreneurs

Prepared by:

 **STRATEGIC FOCUS**

Date: September 2008

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Introduction

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Research Background

- ❑ Focus Media Hong Kong has launched a brand new, territory-wide in-store TV advertising network in Mannings' stores in Hong Kong since November 2007.
- ❑ A 42" LCD TVs was installed at Mannings' top 100 stores with the highest traffic, at the point-of-purchase. The shoppers can view the TVC via the TVs and listen to the audio of the TVC via the in-store PA Systems.
- ❑ Client would like to determine the effectiveness of the medium.

Background of Strategic Focus

- ❑ Strategic Focus Research & Consultancy Ltd. is a full-service marketing research company based in Hong Kong, established by its founder, Mr. David Hui, since September 1996.
- ❑ Mr. Hui has more than 15 years of market research experience. Prior to establishing Strategic Focus, he worked at MBL (now merged with TNS) Hong Kong.
- ❑ Clients include AS Watson Asia, Citibank, DDB, Dentsu, Dentsu Y&R, Euro RSCG, KMB, Matsushita Electric, etc...
- ❑ Type of Research conducted in Media Category:
 - Weekly magazine
 - International business magazine / newspaper
 - TV Viewer-ship audit in China
 - Cable TV research in China
 - Train station display media research
 - Multi-media on board public bus

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Research Objectives

- ❑ **The objectives of the study are to measure:**
 - Awareness of two TVCs in the In-store TV Advertising Network
 - Brand Recall / Message Recall / Ad Recall
 - Hair care product: L'Oréal Elsève Nutri-Gloss Series
 - Skin care product: Garnier Lightcream Renovation SPF 15 (a L'Oréal product)
 - Effectiveness of the In-store TV Advertising Network
 - Purchase Intention on L'Oréal's products
 - Behavior of Visiting Mannings' stores
 - Demographic of Audience
- ❑ **Strategic Focus has been commissioned to undertake this study and this document summarizes the findings.**

Methodology (1/2)

Methodology:

- Face-to-face interviewing at 8 prime locations of Mannings' stores
- With the permission from Mannings, interviewers were stationed inside the selected Mannings' stores
- Interviewers conducted the interviews near the in-store TV or at appropriate area in the stores

Targets:

- Females aged between 15-50
 - Who have purchased any items from Mannings
 - Who have watched the in-store TV advertising network at Mannings' stores
 - Who are not working in relevant industries to include advertising, media, PR, marketing and market research

Sample size: A total of n=258 successful interviews were achieved

Fieldwork: 20-21 August 2008

Mechanics: L'Oréal with its two product categories participated and ran a five-week campaign before and during the survey

Methodology (2/2)

□ Interviewing locations:

- Listed below are the selected Mannings' stores and the number of interviews completed in each store:

Mannings' Branch	Store Address	Number of interviews completed
Amtel Building	G/F Amtel Building, 144-148 Des Voeux Road Central, Sheung Wan	32
Lockhart Road	G/F, Tung Sun Commercial Building, 194-200 Lockhart Rd, Wan Chai	33
President Theatre	Shop B, G/F, 517 Jaffe Road, Causeway Bay	25
Sun Hung Kai Centre	Shop G14 - G18, Ground Floor, Sun Hung Kai Centre, Wan Chai	34
Electric Road	Shop 5-6, G/F, AIA Tower, 183 Electric Road, North Point	33
Cambridge House	Shop A, G/F, Cambridge House, Taikoo Place, Quarry Bay	35
Golden Dragon	G/F, Golden Dragon Centre, 38-40 Cameron Road, Tsimshatsui	33
Sino Cheer Plaza	Shop 1, Sino Cheer Plaza, No. 23 Jordan Road	33
Total		258

L'Oréal Elsève Nutri-Gloss Series



Garnier Lightcream Renovation SPF 15





Effectiveness of In-store TV Advertising Network

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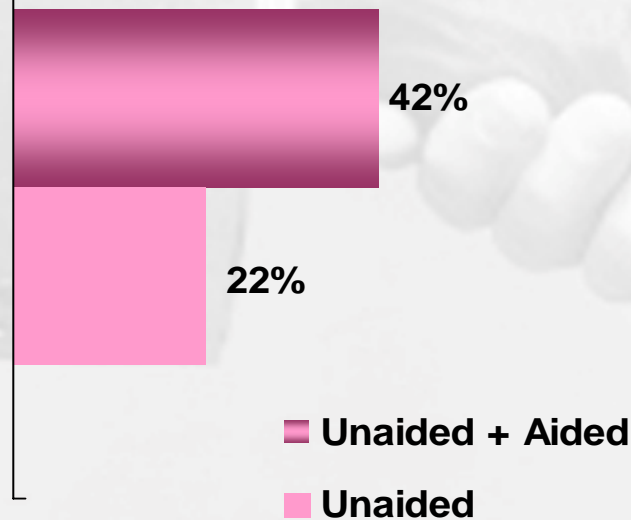
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AdRecall Percentage for L'Oréal Elsève & Garnier (Among all Respondents)



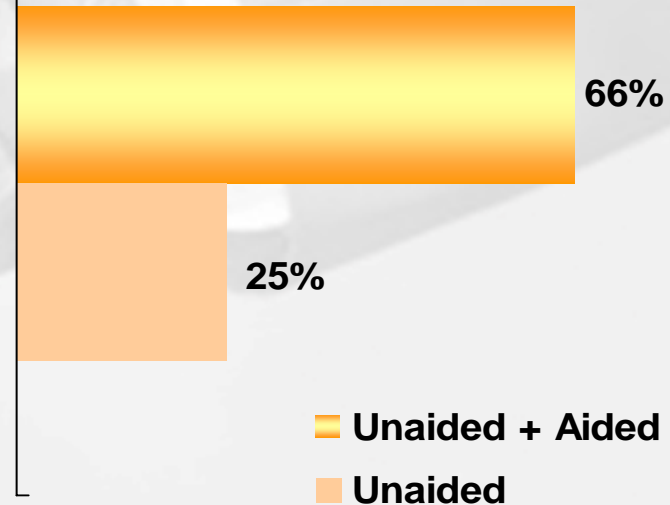
Base: All respondents (n=258)

L'Oréal Elsève



Base: All respondents (n=258)

Garnier



Remarks:

- Refer questions: Q1b (SA), 1c (SA), 3b (SA) and 3c (SA)



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AdRecall Rate for L'Oréal Elsève & Garnier on the In-store TV Advertising Network (Unaided)



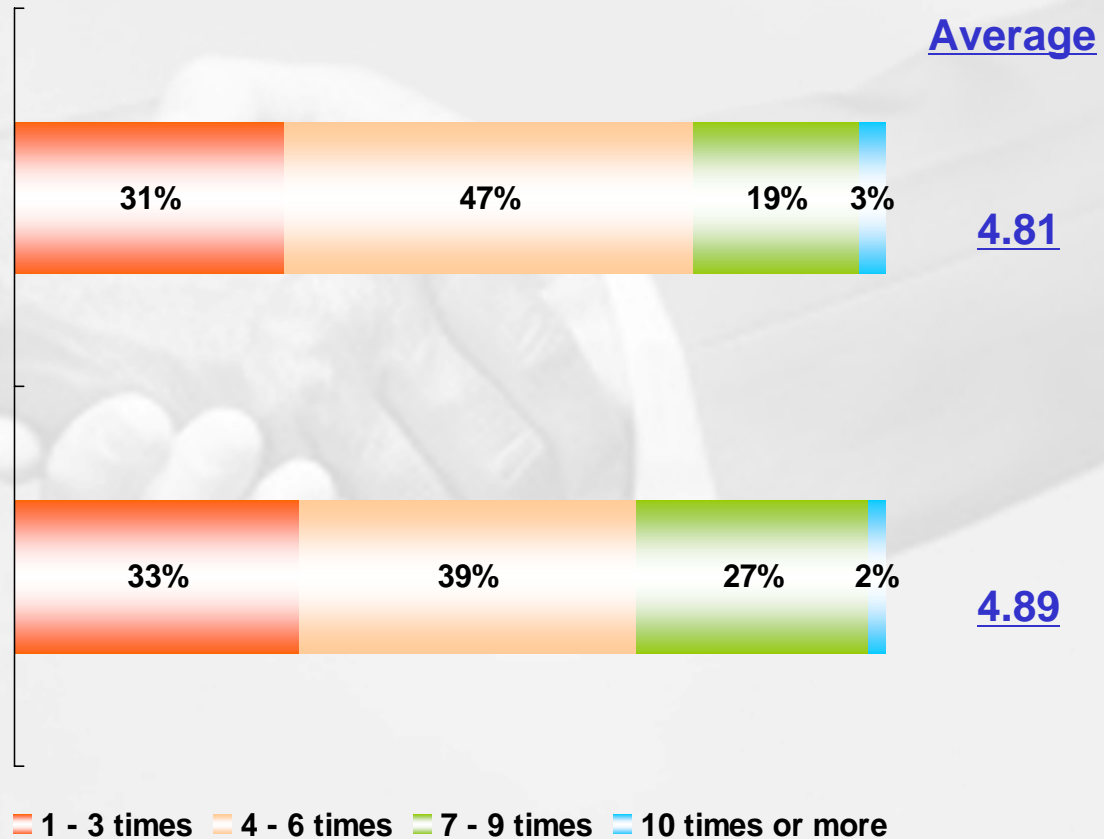
L'Oréal Elsève

Base: Those claimed to see any L'Oréal Elsève Nutri-Gloss Series advertisement and can recall L'Oréal / Elsève (n=58)



Garnier

Base: Those claimed to see any Garnier Lightcream Renovation SPF 15 advertisement and can recall Garnier (n=64)



Average times of watching any of the two TVCs: 4.85



Remarks:

- Refer questions: Q1b (SA), 2a (SA), 3b (SA) and 4a (SA)

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AdRecall Rate for L'Oréal Elsève & Garnier on the In-store TV Advertising Network (Aided)



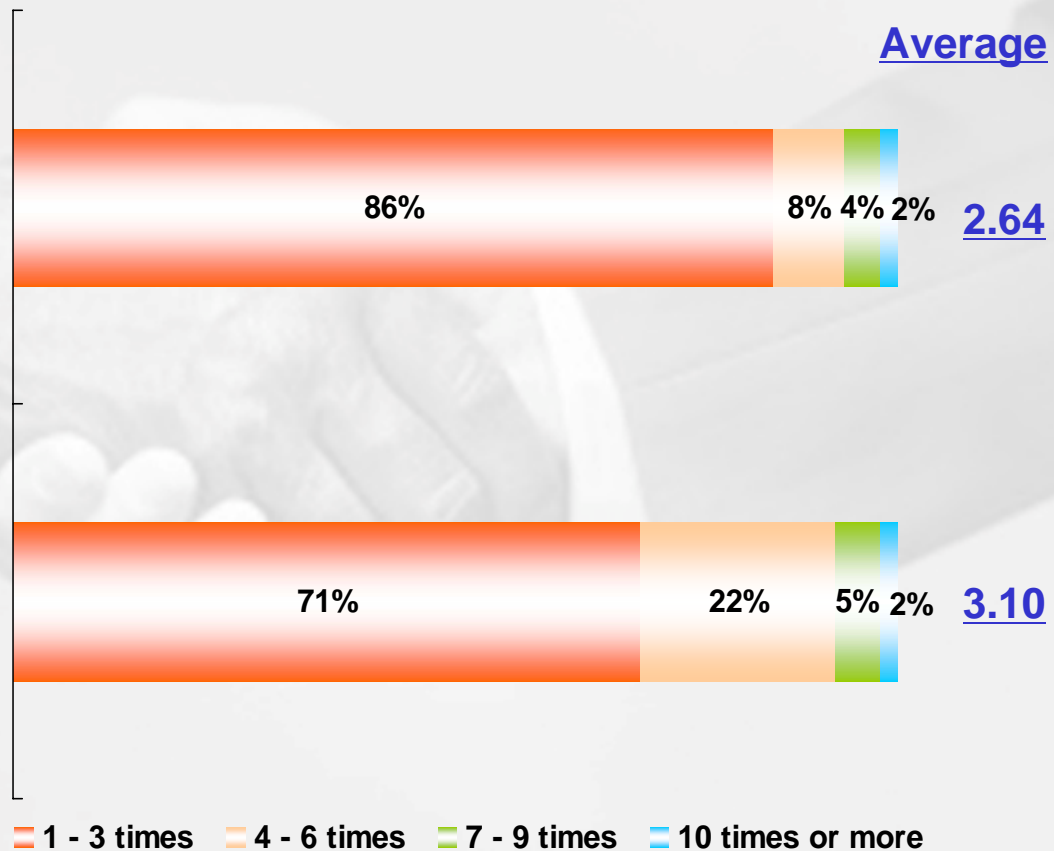
L'Oréal Elsève

Base: Those who are not able to recall the name L'Oréal Elsève but claimed to have seen it on in-store TV advertising network at any Mannings' store when prompted (n=50)



Garnier

Base: Those who are not able to recall the name Garnier but claimed to have seen it on in-store TV advertising network at any Mannings' store when prompted (n=105)



Average times of watching any of the two TVCs: 2.95



Remarks:

- Refer questions: Q1c (SA), 2a (SA), 3c (SA) and 4a (SA)

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AdRecall Rate for L'Oréal Elsève & Garnier on the In-store TV Advertising Network (Unaided + Aided)



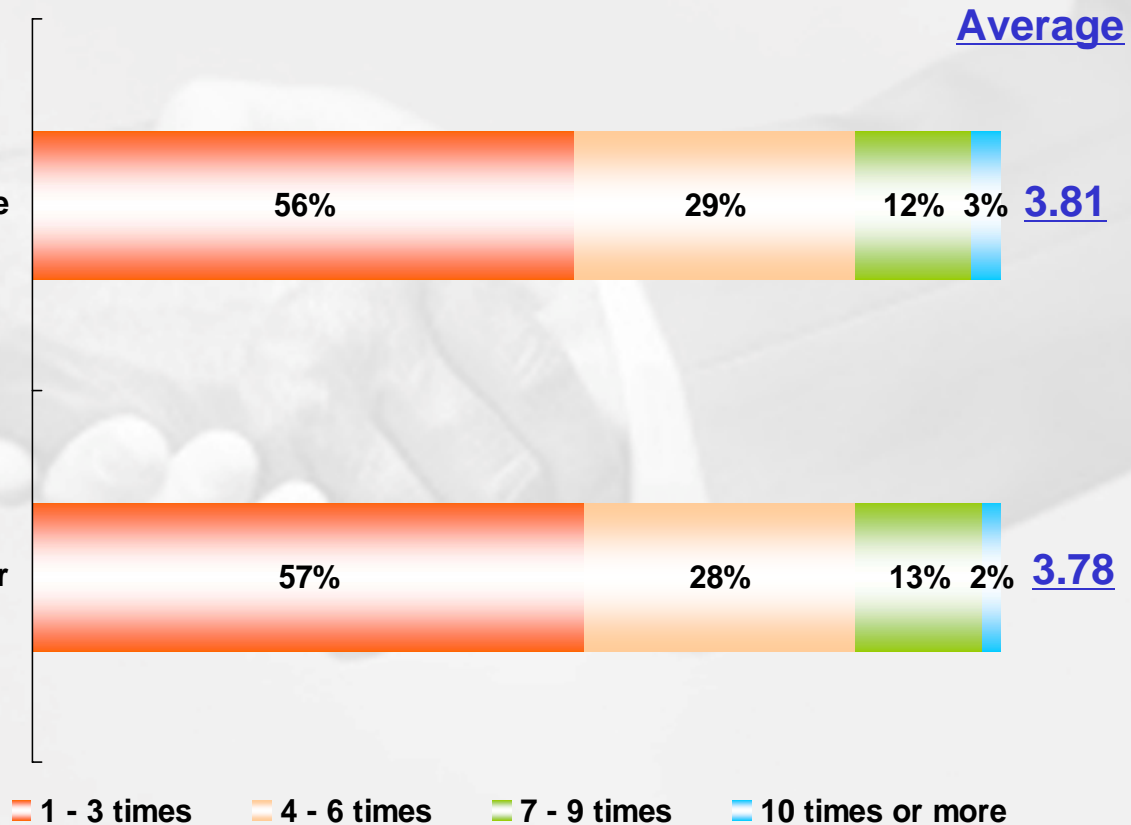
L'Oréal Elsève

Base: Those claimed to see any L'Oréal Elsève Nutri-Gloss Series advertisement on the in-store TV advertising network at any Mannings' store, and not from other medium in the past 4 weeks (n=108)



Garnier

Base: Those claimed to see any Garnier Lightcream Renovation SPF 15 advertisement on the in-store TV advertising network at any Mannings' store, and not from other medium in the past 4 weeks (n=169)



Average times of watching any of the two TVCs: 3.79



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Remarks:

- Refer questions: Q2a (SA) and 4a (SA)

Message Recall for L'Oréal Elsève & Garnier



Base: Those claimed to see any L'Oréal Elsève Nutri-Gloss Series advertisement on the in-store TV advertising network at any Mannings' store, and not from other medium in the past 4 weeks (n=108)



Base: Those claimed to see any Garnier Lightcream Renovation SPF 15 advertisement on the in-store TV advertising network at any Mannings' store, and not from other medium in the past 4 weeks (n=169)

Product benefits	82%
➤ <i>Smoother hair</i>	42%
➤ <i>Shiny hair</i>	36%
➤ <i>Caring of hair</i>	19%
➤ <i>Hair more elastic</i>	6%
Others (e.g. famous, price cut, Mannings product)	6%
➤ <i>Introduce a new product/ brand</i>	4%
Cannot recall message	12%

Product benefits	89%
➤ <i>Whitening</i>	75%
➤ <i>Caring of skin</i>	8%
➤ <i>Freckles removal</i>	7%
➤ <i>UV protection</i>	4%
➤ <i>Smoother skin</i>	4%
➤ <i>Sun block</i>	3%
➤ <i>Good and healthy for skin</i>	2%
➤ <i>Moisturizing</i>	2%
➤ <i>Cleansing/ refreshing</i>	2%
Product content (e.g. Vitamin C, Fruit Acid, lemon, natural, SPF)	4%
Others (e.g. cheap in price, summer feel, Zhang Zi Yi)	2%
Cannot recall message	8%

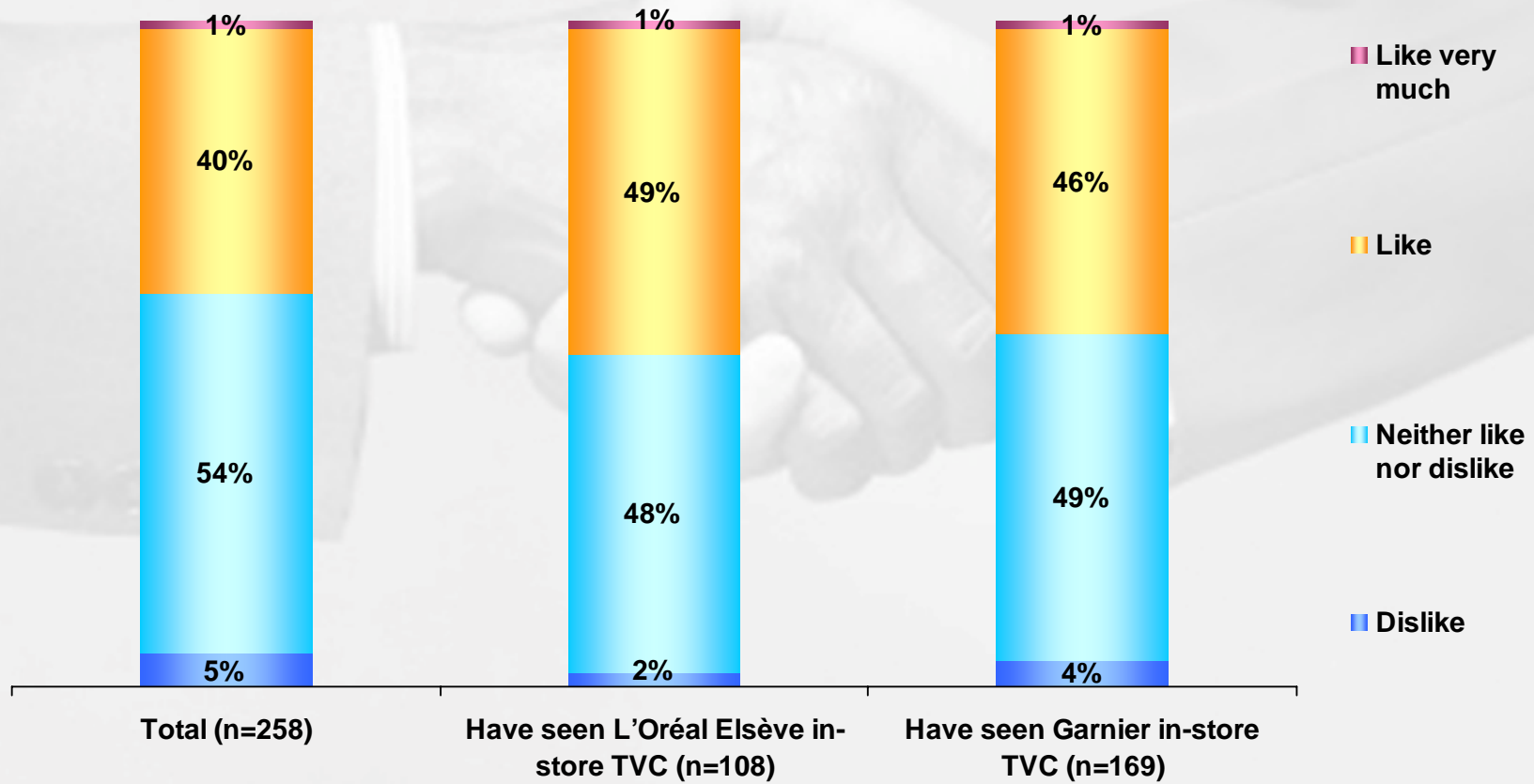


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Remarks:

- Refer questions: Q2b (MA) and 4b (MA); Mention less than 2% is excluded

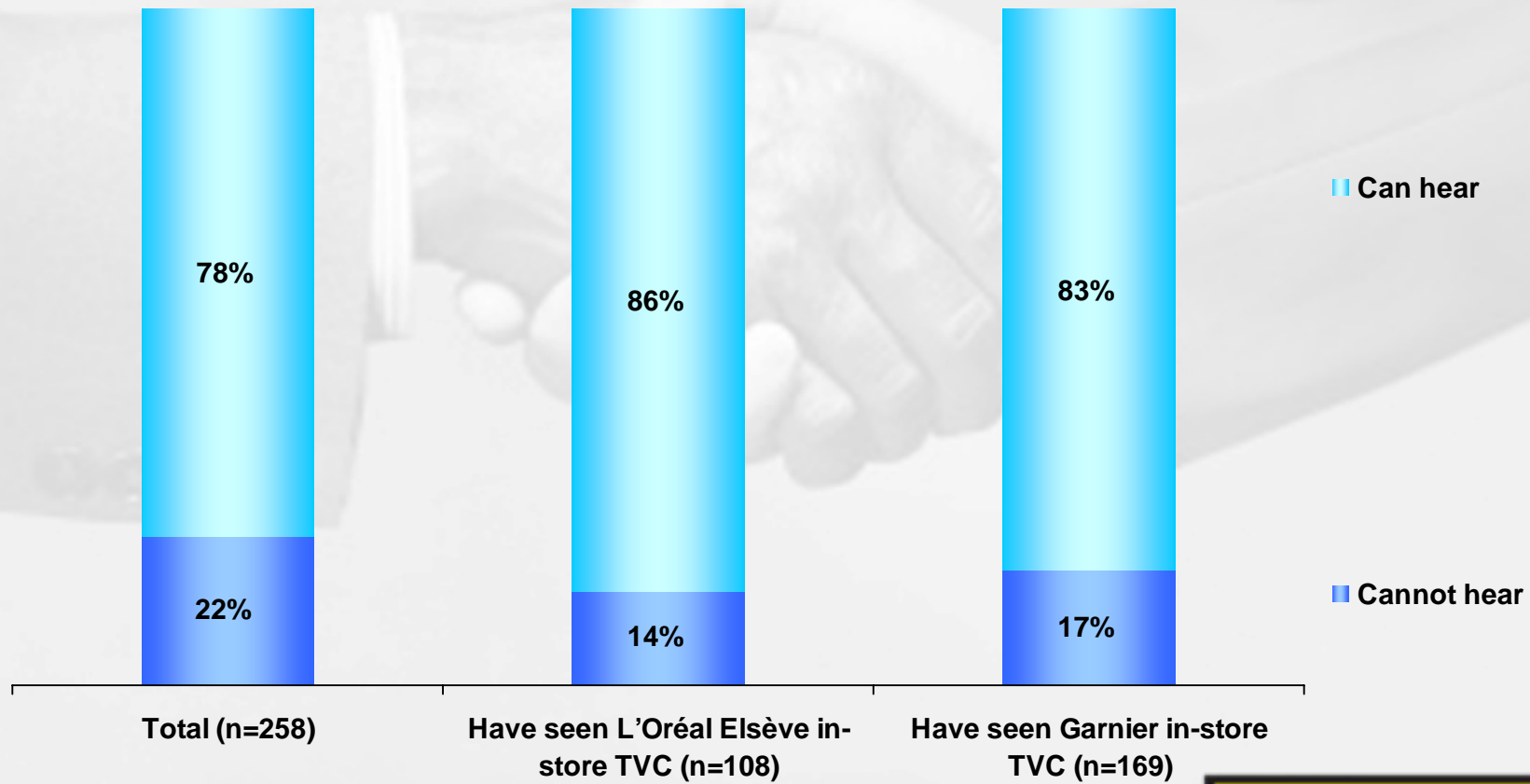
Overall Preference of In-store TV Advertising Network



Remarks:

- Refer questions: Q7 (SA)

Sound of In-store TV Advertising Network



Remarks:

- Refer questions: Q8 (SA)



Purchase Intention on L'Oréal's Products

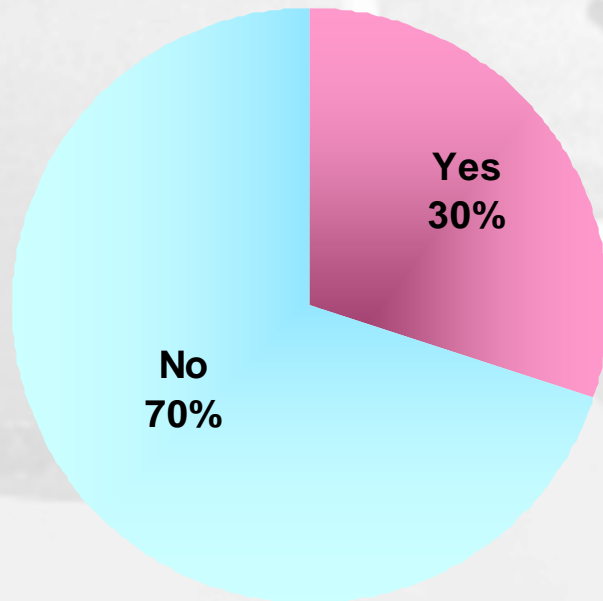
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Purchase Any Related Products at Mannings' Stores in the past 4 weeks

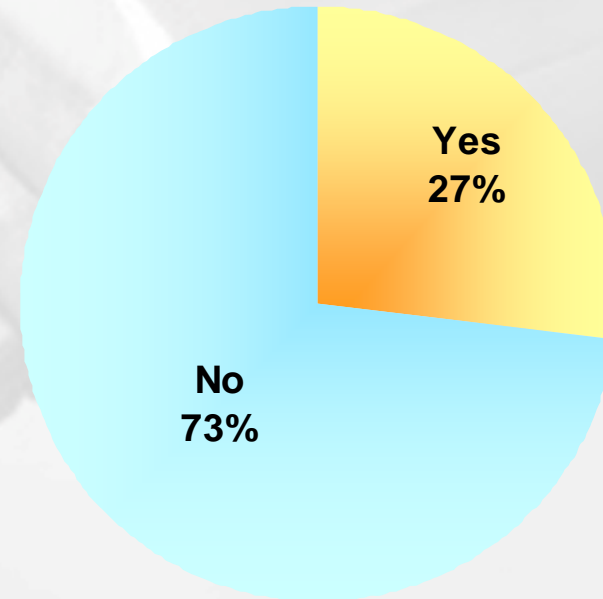
Bought any hair care products from L'Oréal/Elseve

Base: All respondents (n=258)



Bought any skin care products from L'Oréal/Garnier

Base: All respondents (n=258)



Remarks:

- Refer questions: Q6a (SA) and 6d (SA)

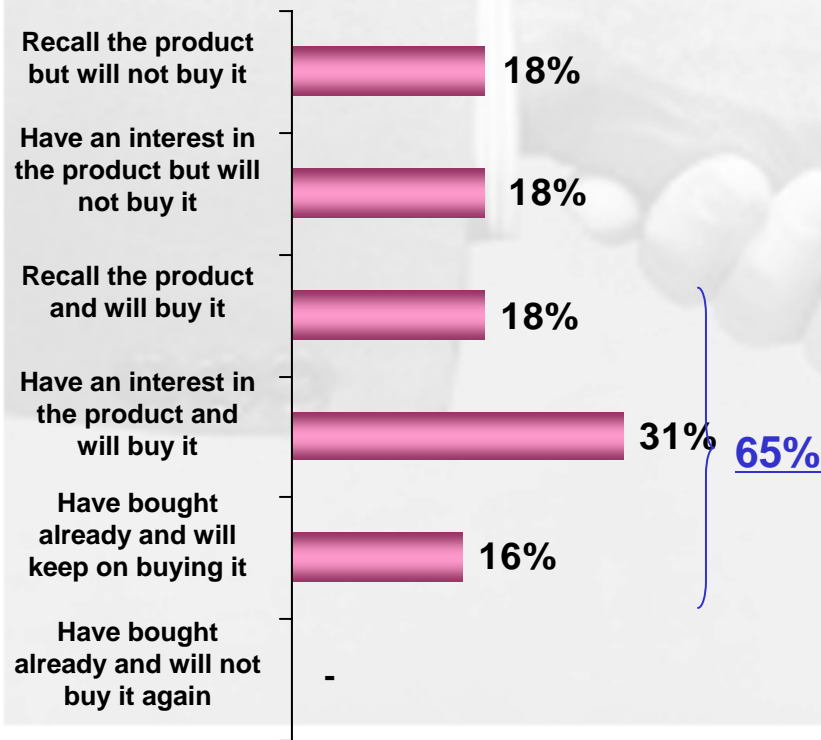


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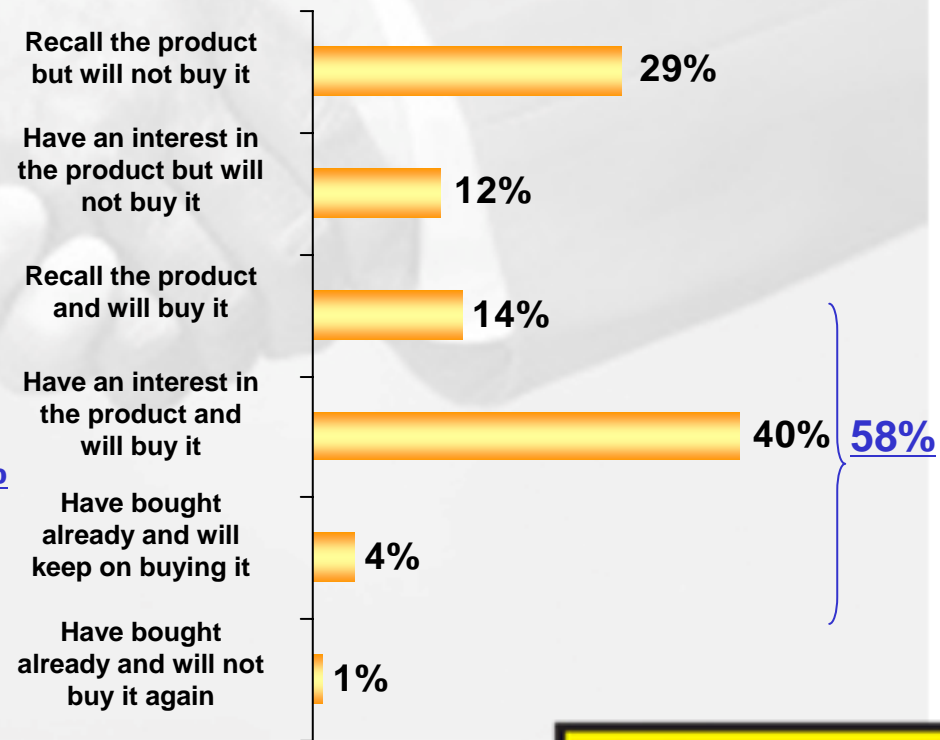
Purchase Intention After Watching L'Oréal Elsève/ Garnier TVC on the In-Store TV Advertising Network (1/2)



Base: Those claimed to see any L'Oréal Elsève Nutri-Gloss Series advertisement on the in-store TV advertising network at any Mannings' store, and not from other medium in the past 4 weeks (n=108)



Base: Those claimed to see any Garnier Lightcream Renovation SPF 15 advertisement on the in-store TV advertising network at any Mannings' store, and not from other medium in the past 4 weeks (n=169)



Remarks:

- Refer questions: Q2c (SA) and 4c (SA)

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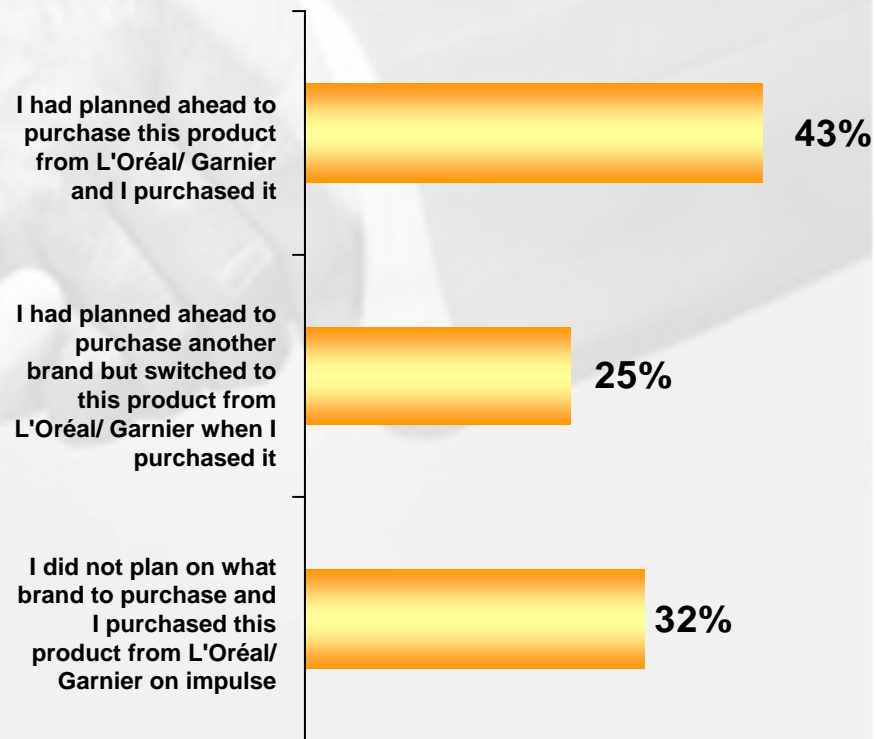
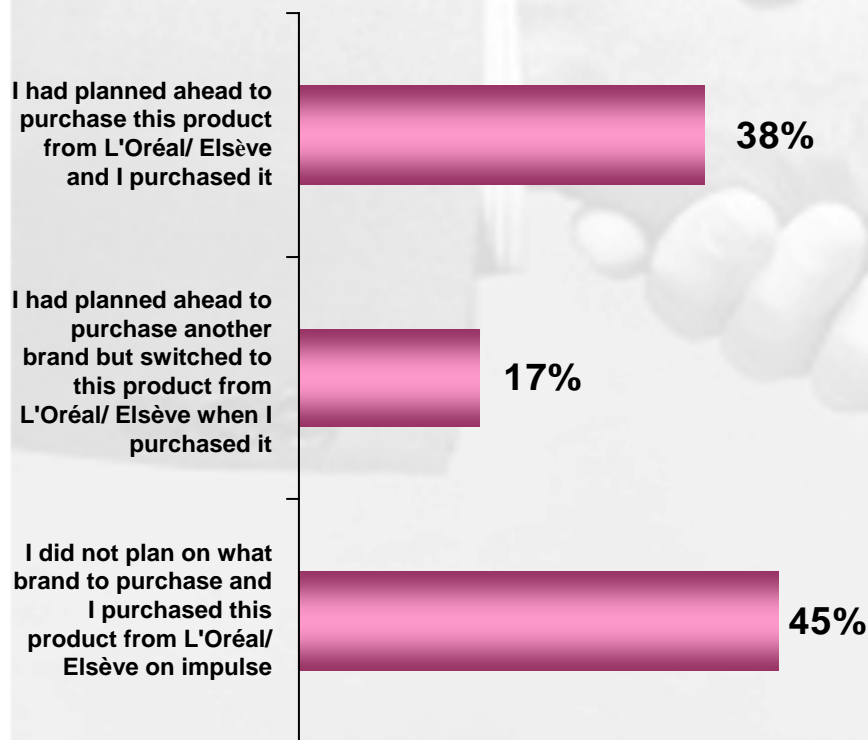
Purchase Intention After Watching L'Oréal Elsève/ Garnier TVC on the In-Store TV Advertising Network (2/2)



Base: Those who have bought any hair care products from L'Oréal/Elsève at any Mannings' store in the past 4 weeks (n=77)



Base: Those who have bought any skin care products from L'Oréal/Garnier at any Mannings' store in the past 4 weeks (n=69)



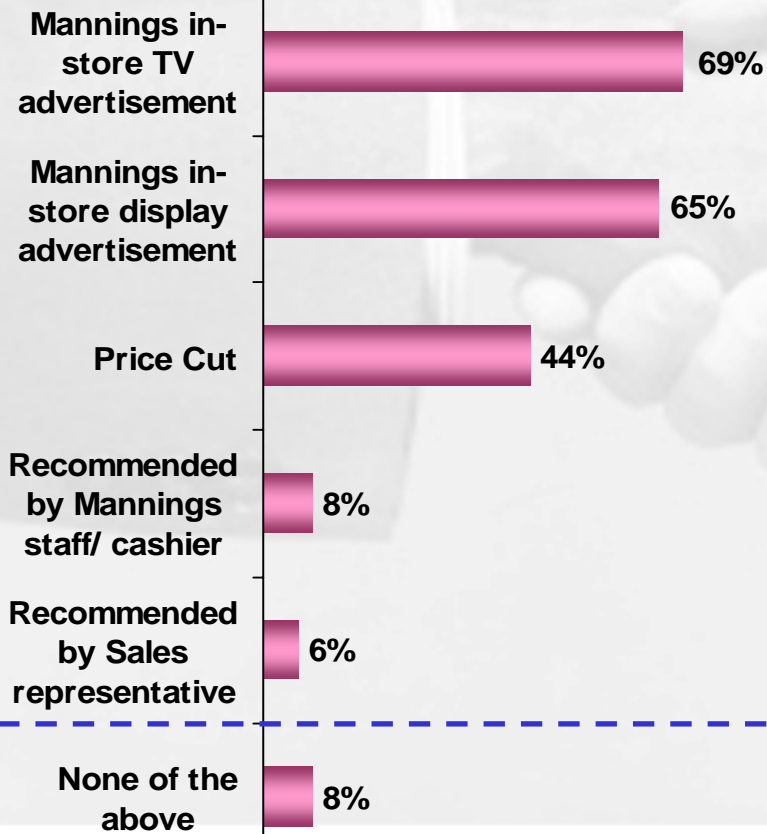
Remarks:

- Refer questions: Q6b (SA) and 6e (SA)

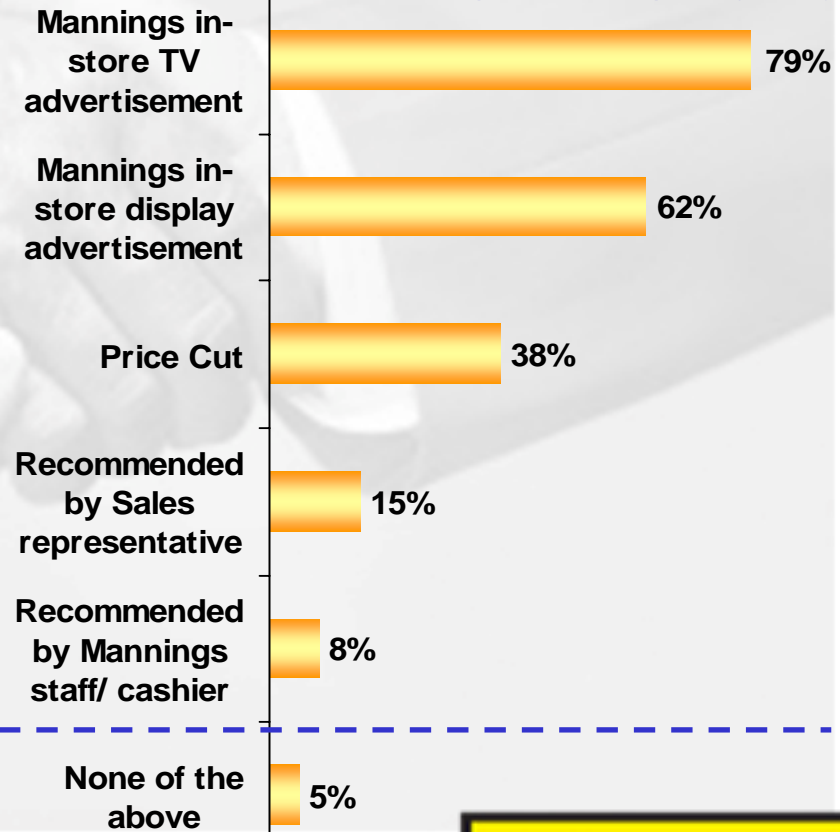
What Triggers Switching & Impulse Buying of these L'Oréal's Products



Base: Those who have switched to this L'Oréal/Elseve product or purchased this L'Oréal/Elseve product on impulse (n=48#)



Base: Those who have switched to this L'Oréal/Garnier product or purchased this L'Oréal/Garnier product on impulse (n=39#)



Remarks:

- Refer questions: Q6c (MA) and 6f (MA)
- # denotes small sample size



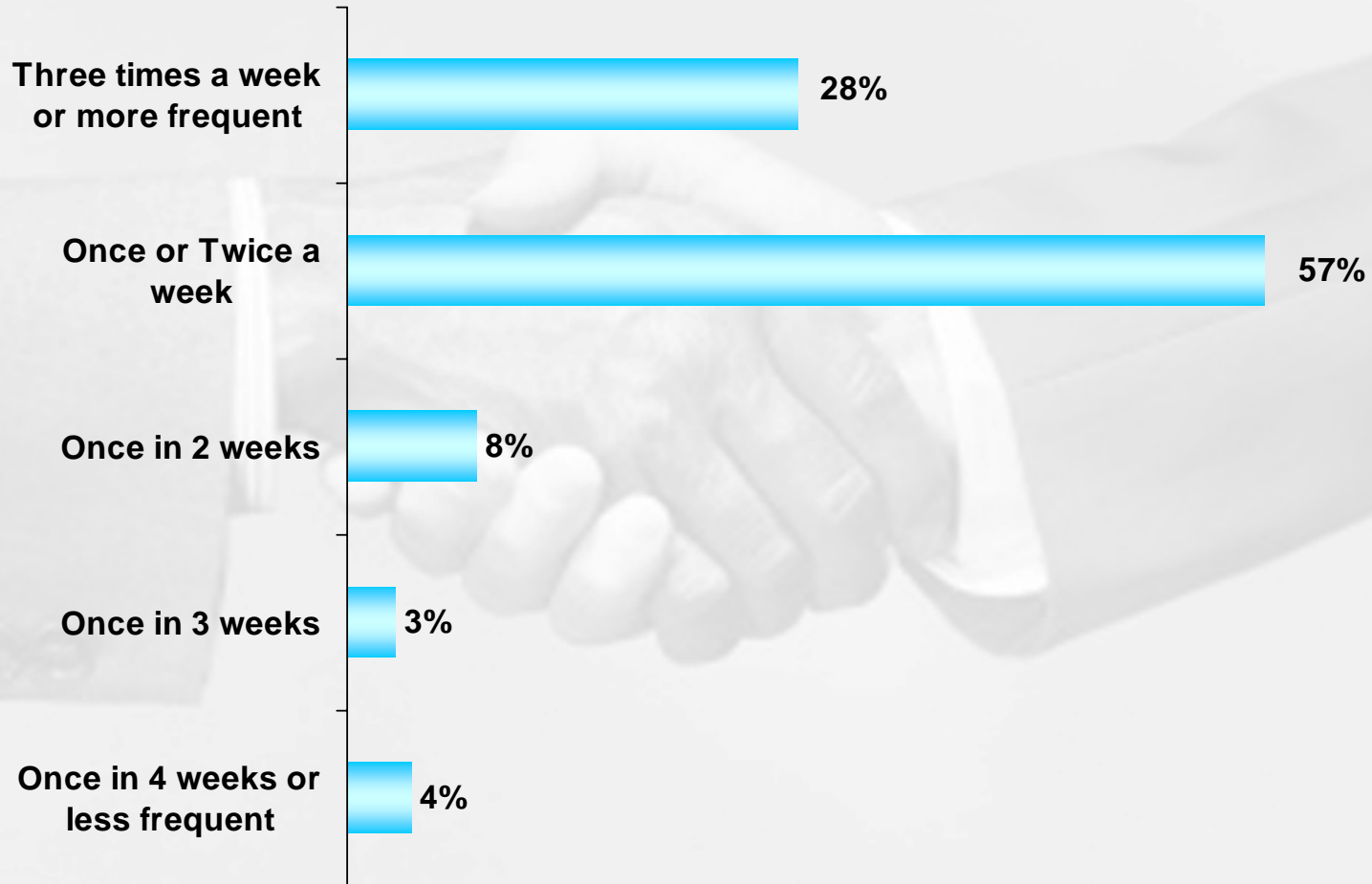
Behavior of Visiting Mannings' Stores

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Frequency of Visiting Mannings' Stores

Base: All respondents (n=258)



Average frequency of visiting Mannings' stores: 1.76 times a week



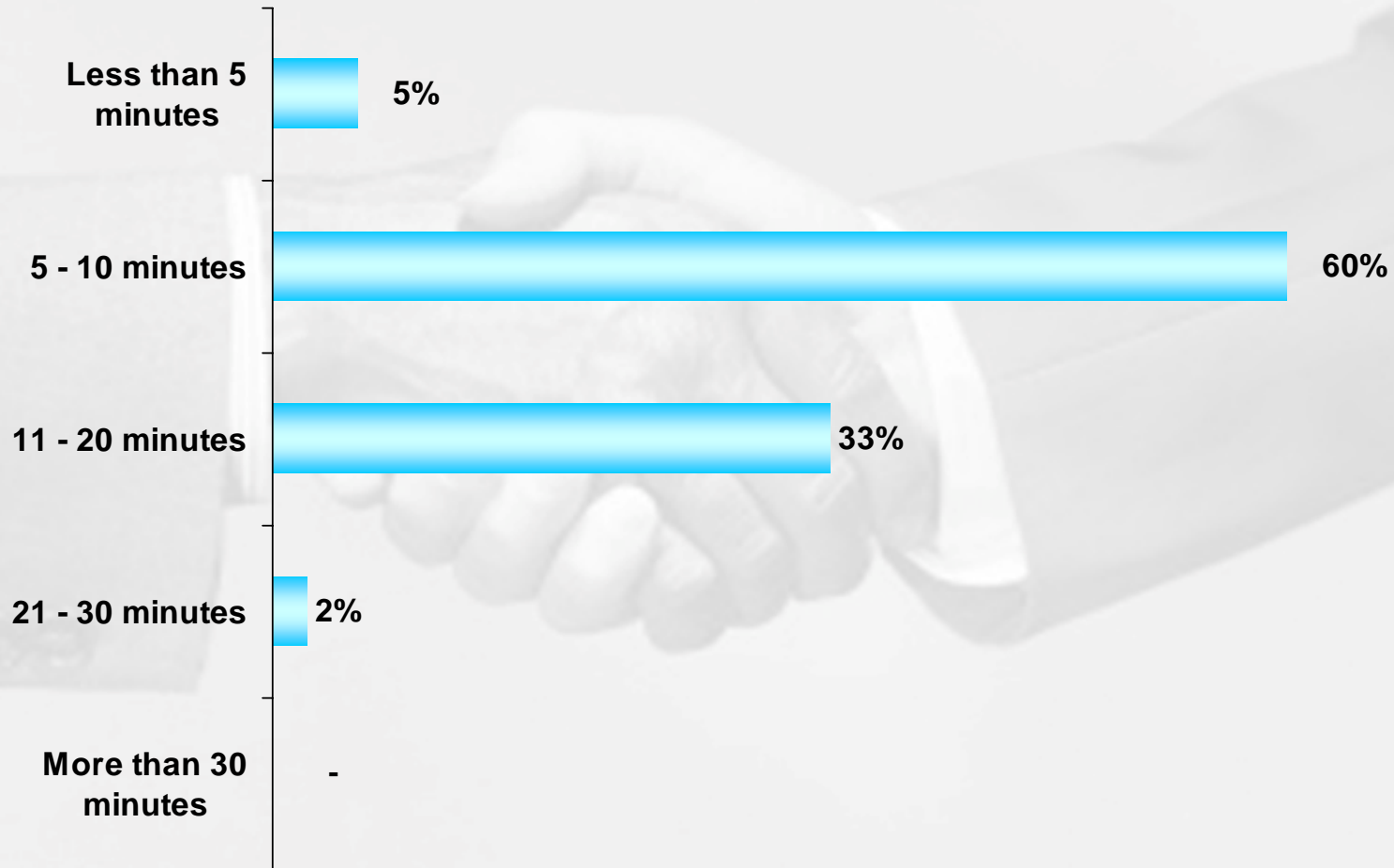
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Remarks:

- Refer questions: Q9 (SA)

Length of Staying in Mannings' Stores at One Time

Base: All respondents (n=258)



Average length of staying in Mannings' stores: 10.41 minutes at one time

Remarks:

- Refer questions: Q10 (SA)

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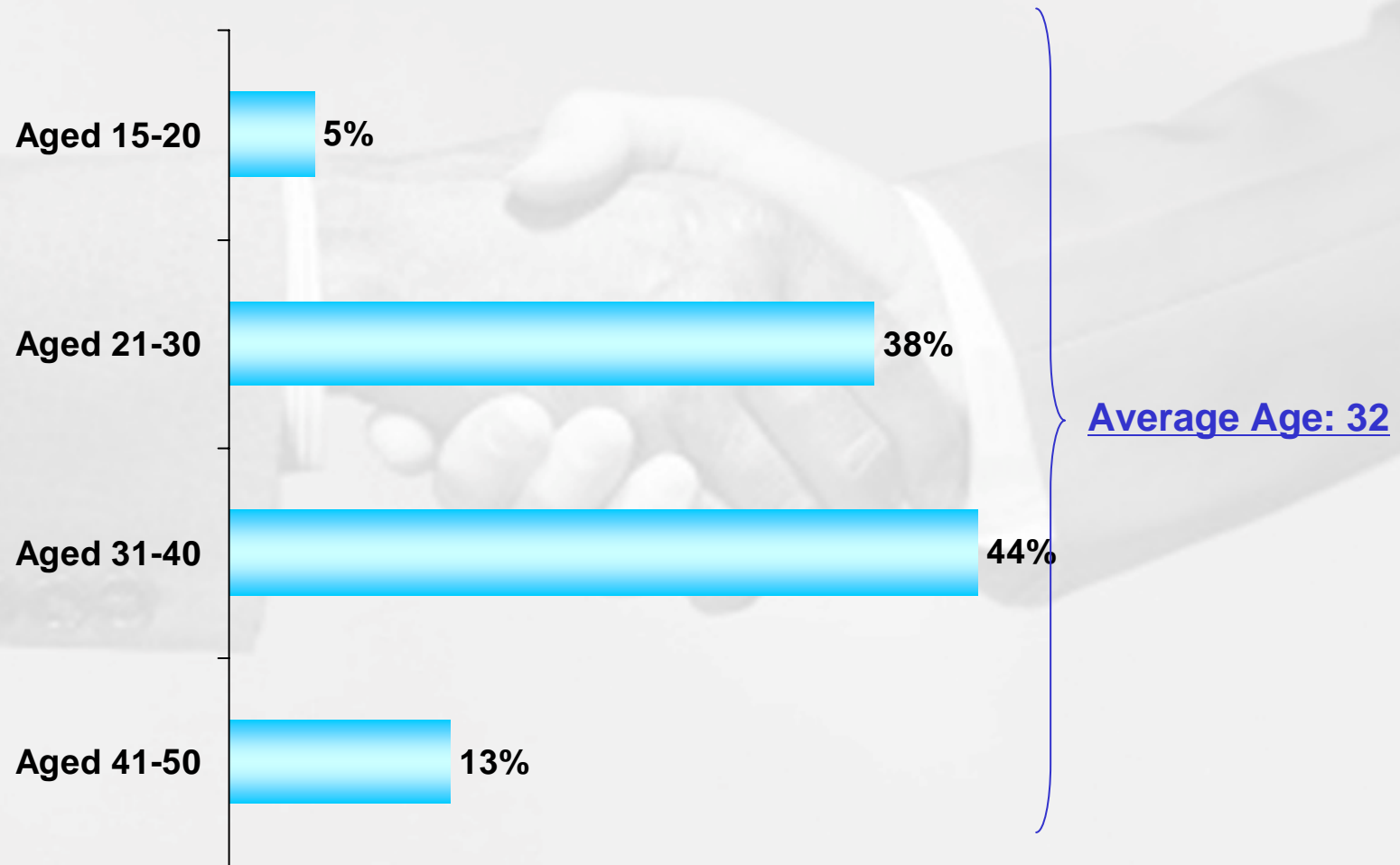
Demographic of Audience

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Current Age

Base: All respondents (n=258)



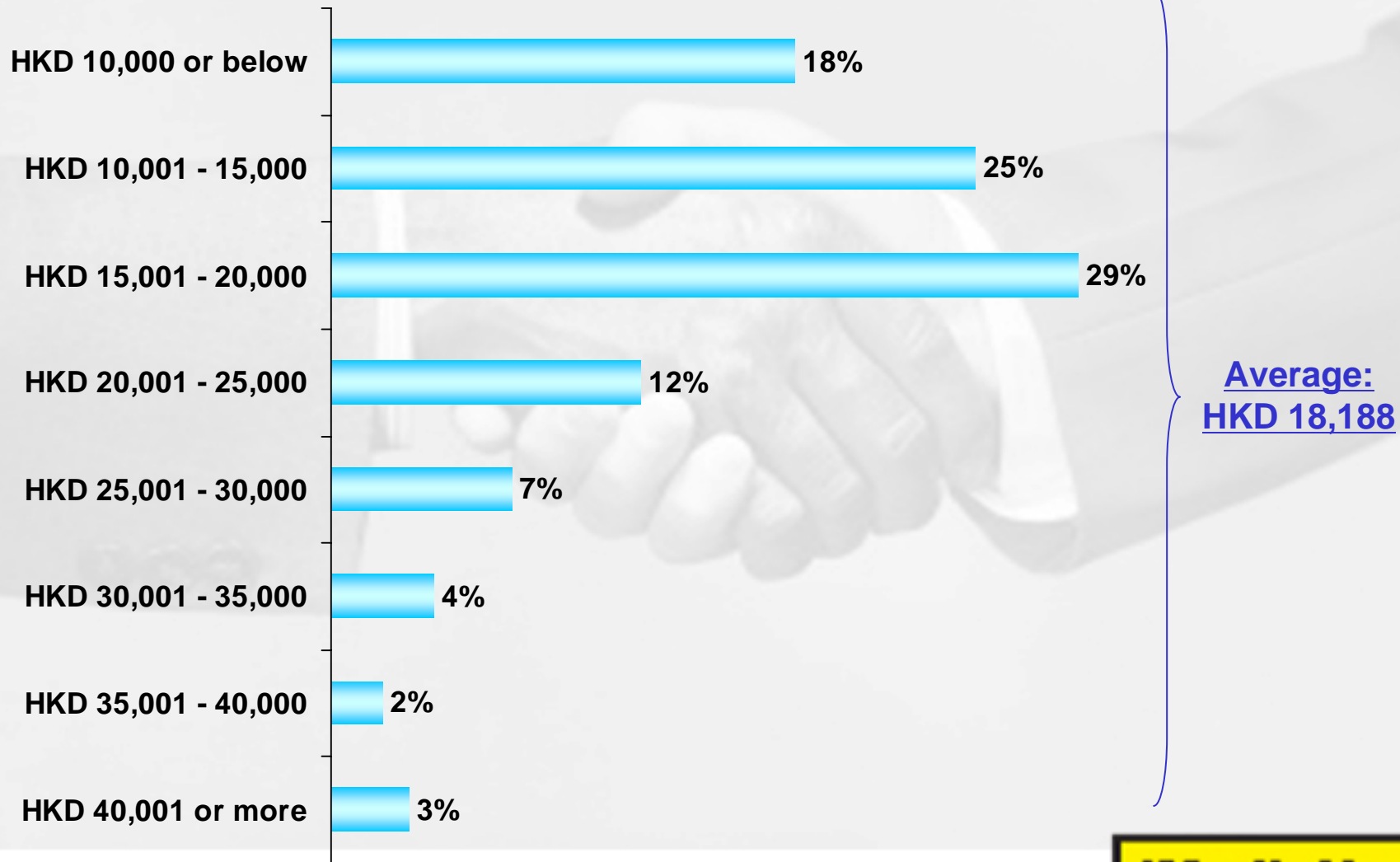
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Remarks:

- Refer questions: D1 (SA)

Monthly Personal Income

Base: Those who have answered monthly personal income (n=240)

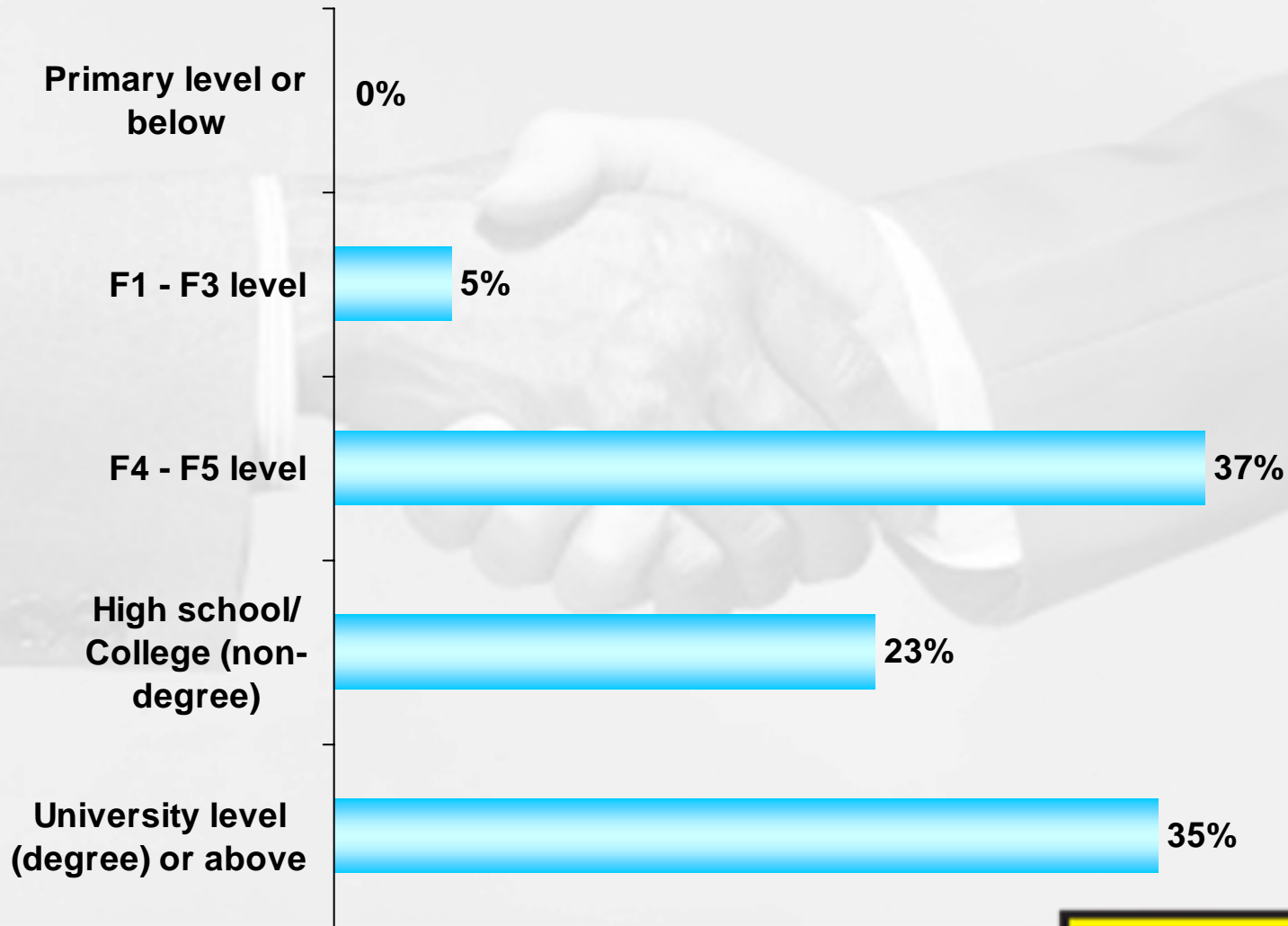


Remarks:

- Refer questions: D2 (SA)
- Excluded those "refused" or "not applicable" for this question

Education Attained

Base: All respondents (n=258)



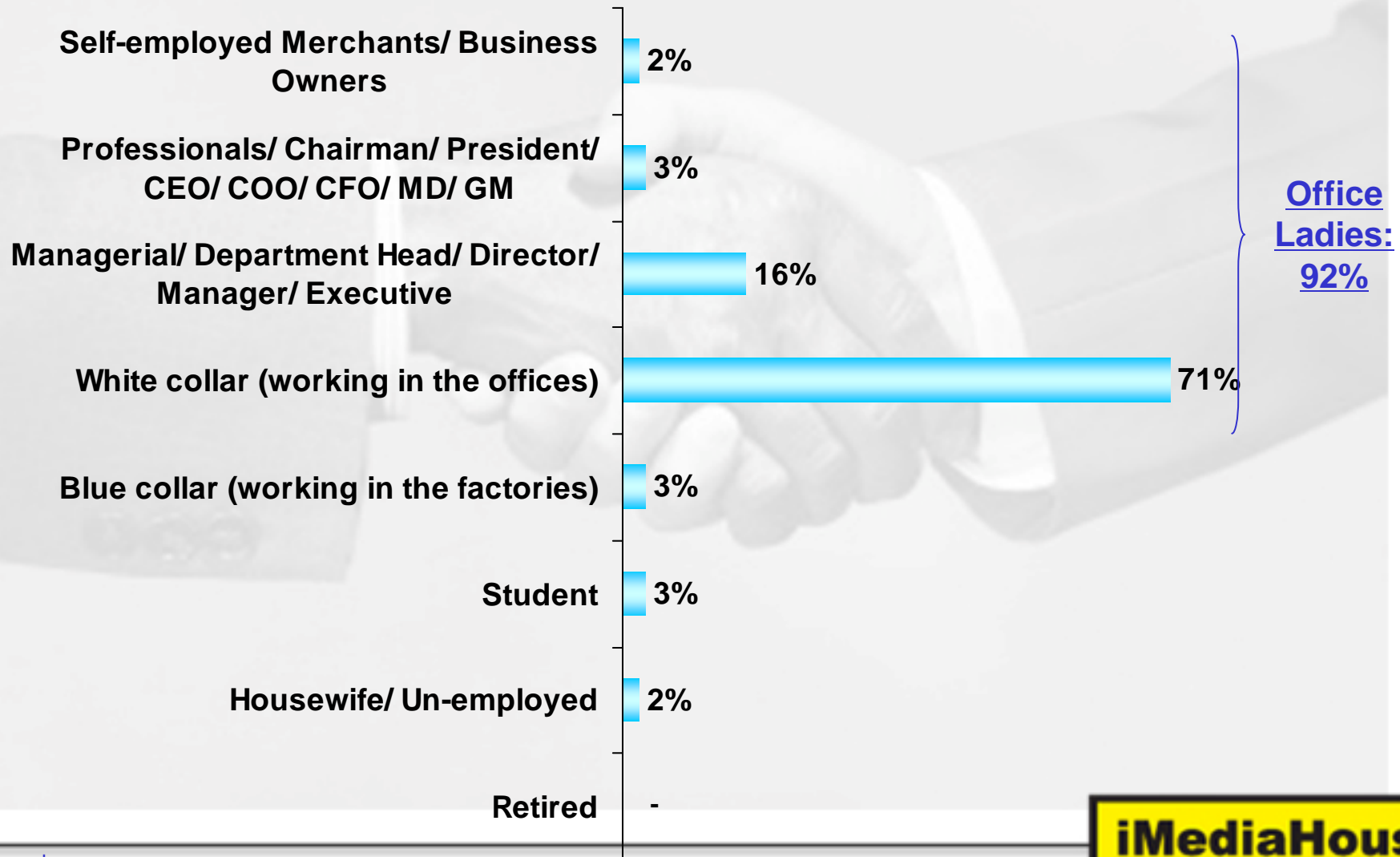
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Remarks:

- Refer questions: D3 (SA)

Current Occupation

Base: All respondents (n=258)



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Remarks:

- Refer questions: S3 (SA)



THANK YOU

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