新零售时代下营销创新思考

DECODE INNOVATION IN THE NEW RETAIL ERA

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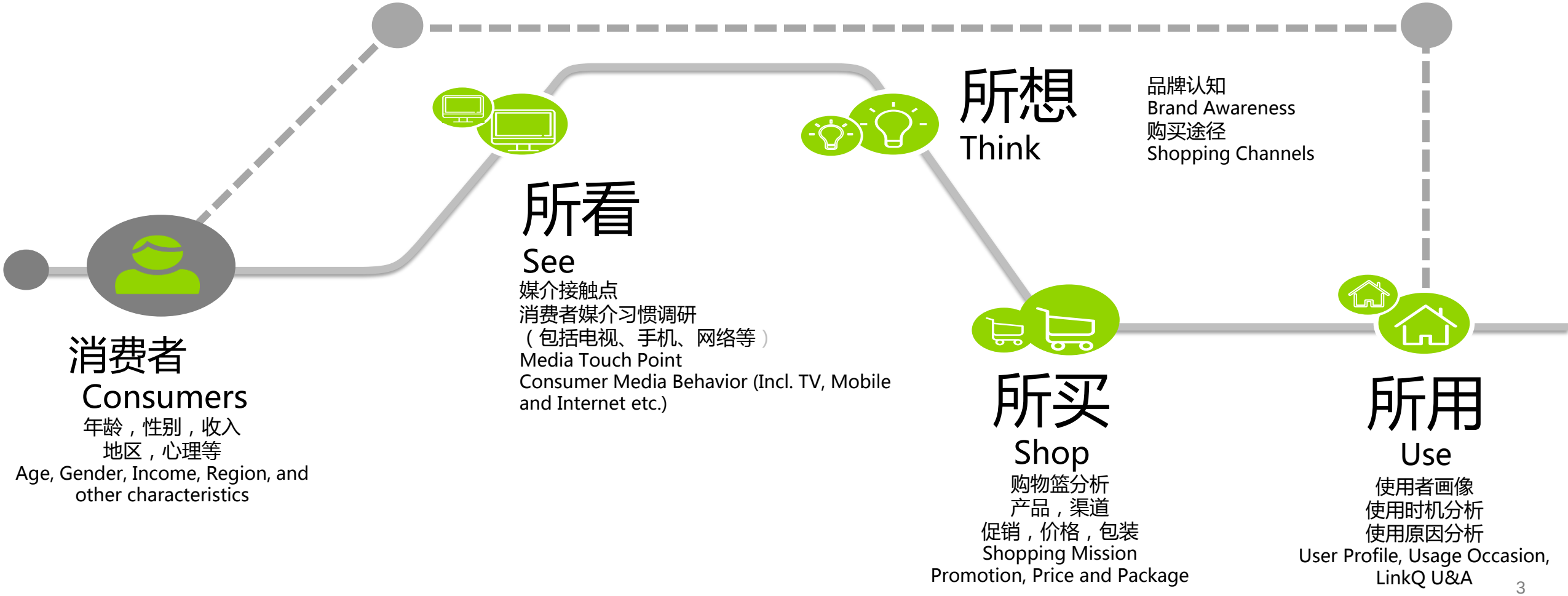
凯度消费者指数/Kantar Worldpanel

凯度消费者指数 – 全球领先的消费者行为研究机构
Kantar Worldpanel – Global Leader in Behavior Insights

以消费者为核心，记录完整消费路径中的各个环节以及全渠道的购买行为
We monitor purchase/usage pattern as well as what they see and think on a continuous basis



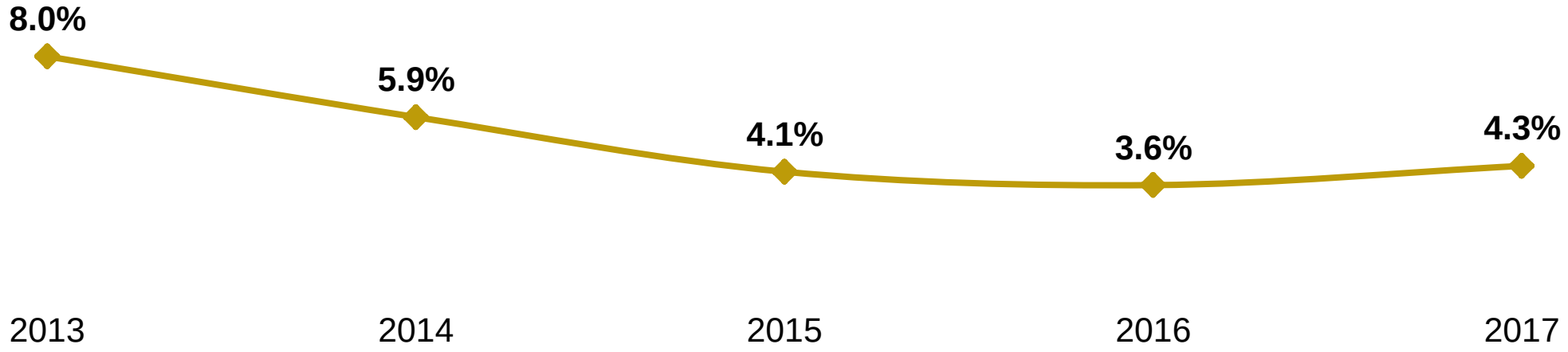
市场在变，茶饮界的网红也在变

Hot selling bubble tea has changed thanks to Douyin

过去一年消费市场冷暖如何？
How was the market in the past year?

2017年明显回暖，消费升级和城市人口增长是主要动力
2017 saw noticeable growth recovery, driven by trading up and population increase

整体快消品，全渠道，年度消费金额增长率
Total FMCG, all channels, yearly value growth rate



频次 Frequency

-3.3%▼

平均价格 Average price

+2.9%▲

家庭数量 Urban Famlies

+3.4%▲

双速前行的中国市场，随着消费方式的改变，冷热差异巨大
In a two-speed market, with changing consumption patterns, growth opportunities become more scattered

+29%

网上购物2017年销售增速
E-commerce sales growth

+22%

现制茶饮2017年销售增长
On premise tea drink growth

+2.8%

家庭包装食品饮料销售增长

电商渠道
E-commerce

户外消费
Out of Home

户内消费
In-home

进入对的品类，通过创新驱动增长
Enter the right market, and drive growth through innovation is critical

69%

监测106个品类，73个品类实现增长
73 out of 106 categories achieved growth

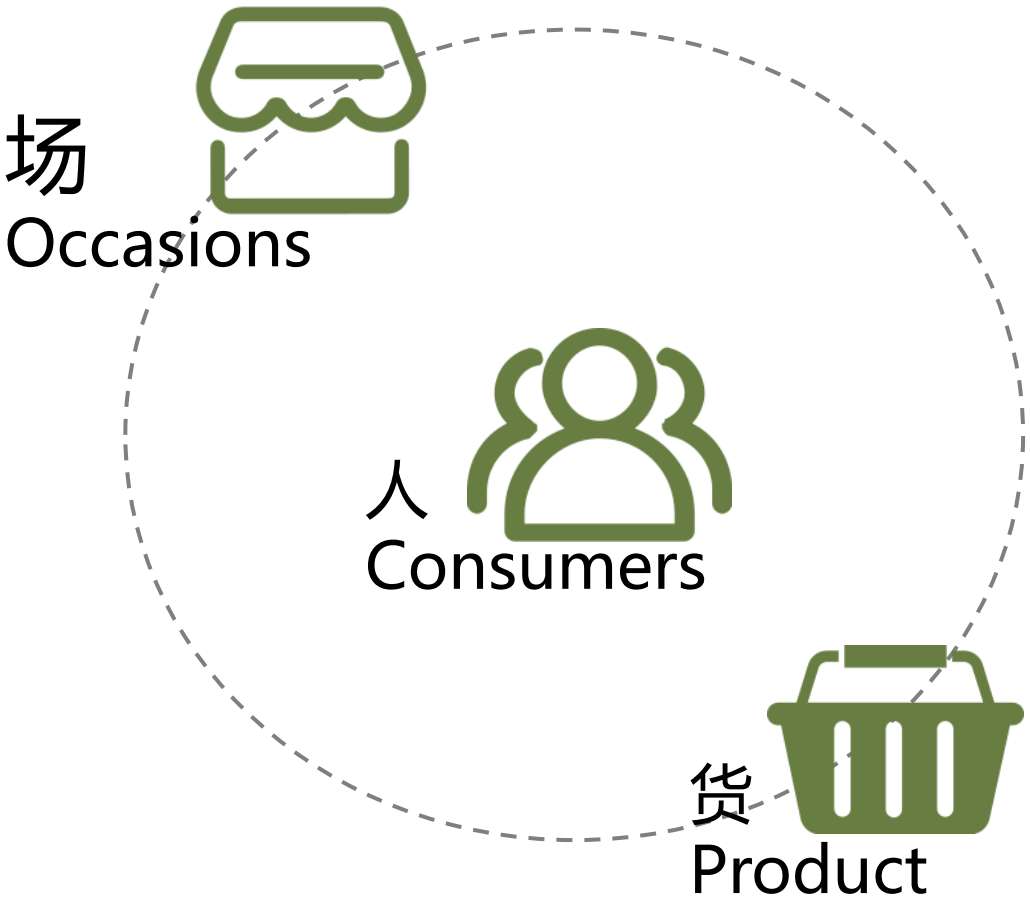
+42%

豆奶的增长值得瞩目，在下线城市的增长更为强劲；豆本豆的加入也推动了这种增长
Soy Milk reported most impressive growth, with Dou Ben Dou’s entry

166,939

今年上市新品数量比2016增长30%
30% more new SKUs were picked up compared to 2016

新零售时代下，构建人货场的组合， 推动消费升级
In the new retail era, innovation is to be re-constructed



把握未来消费者的需求是探讨创新的起点

Innovation starts with consumers at the center

中国消费者对于健康的定义发生了巨变
Fundamental shift in how consumers see health & wellness

更加健康的生活方式意味着新的品类机会

As consumers re-define health, category opportunities become more divided.

50%

Penetration% of taking exercises at least once a week
每周至少运动一次人数比例

销售额增长率% 2017年vs.2016年
Value Growth Rate%, 2017 vs 2016

+42%

豆奶
Soybean Milk

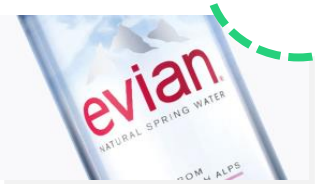
+18%

固体营养粉
Nutrient Solid Drink

+10%

乳酪
Cheese

+9%



包装水
Package Water

+8%

酸奶
Yogurt

数据来源；凯度消费者指数家庭样组，2017年vs.2016年
Data: Kantar Worldpanel, 52 w/e Dec. 2017 vs YA

把握儿童家庭对于食品饮料的需求，引航蓝海
Families with kids saw tremendous growth potential– wellness and fun is the new blue ocean

+7%

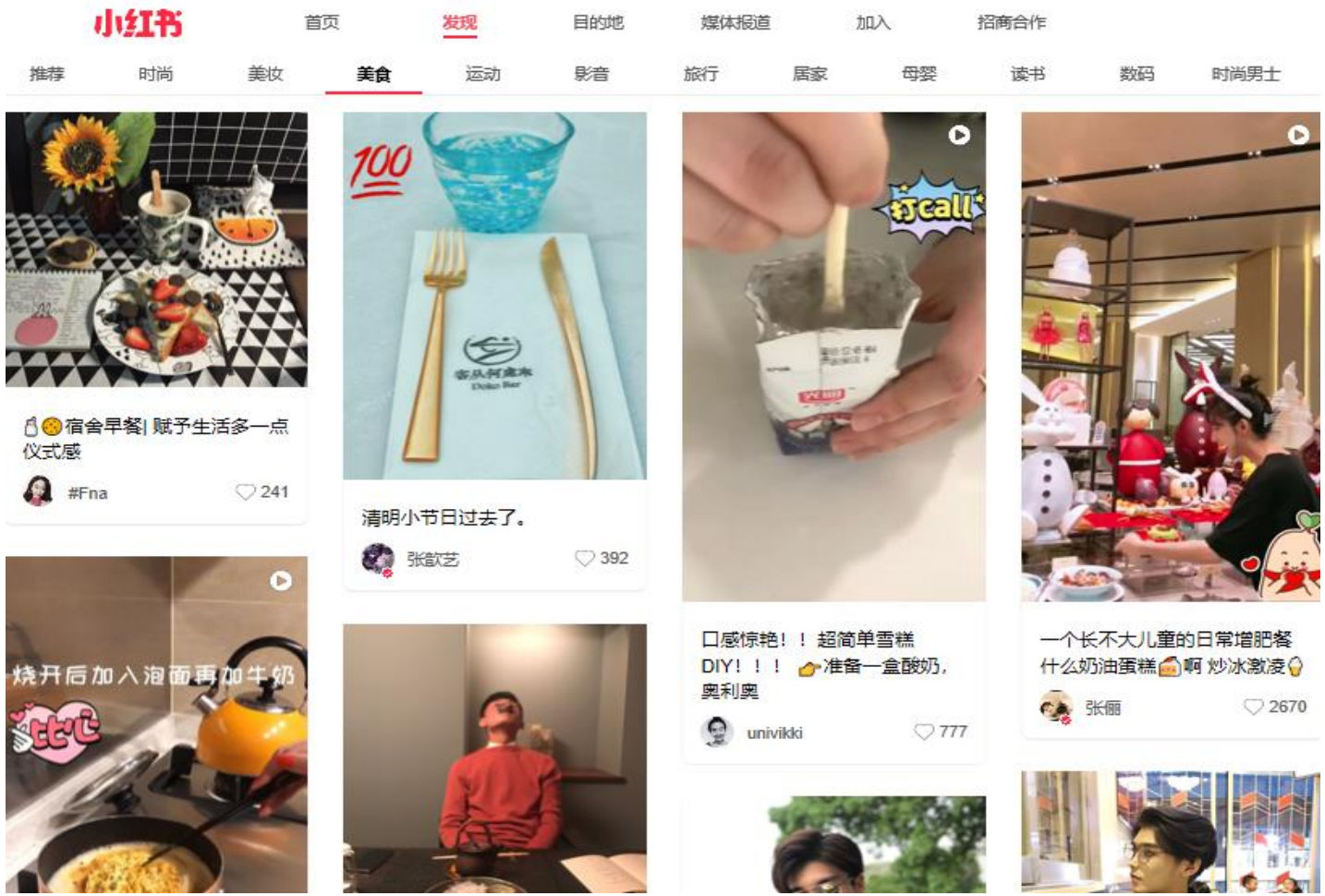
10-14岁儿童增长率
E2021 VS. 2016
Families with children aged 0-14
E 2021 vs. 2016

购买儿童保健品的家庭增加290万户，该市场达到了**29%**销售增长
2.9milion new Families bought child health supplements, with 29% growth

IP+趣味性零食 -小猪佩奇饼干在年轻有小孩家庭中渗透率已到11%
IP+ fun –Pepa Pig penetration reached 11% amongst young families with kids

数据来源：凯度消费者指数，2017年比较2016年

好货需要分享 – 年轻人的生活态度
Sharing on social media is an attitude of life



颜值即正义，个性化和黑科技为产品赋能

Appearance and design sells, Individual & technology empower brand success

颜值即正义，食品饮料也不例外
Attractive appearance and feel of design sell

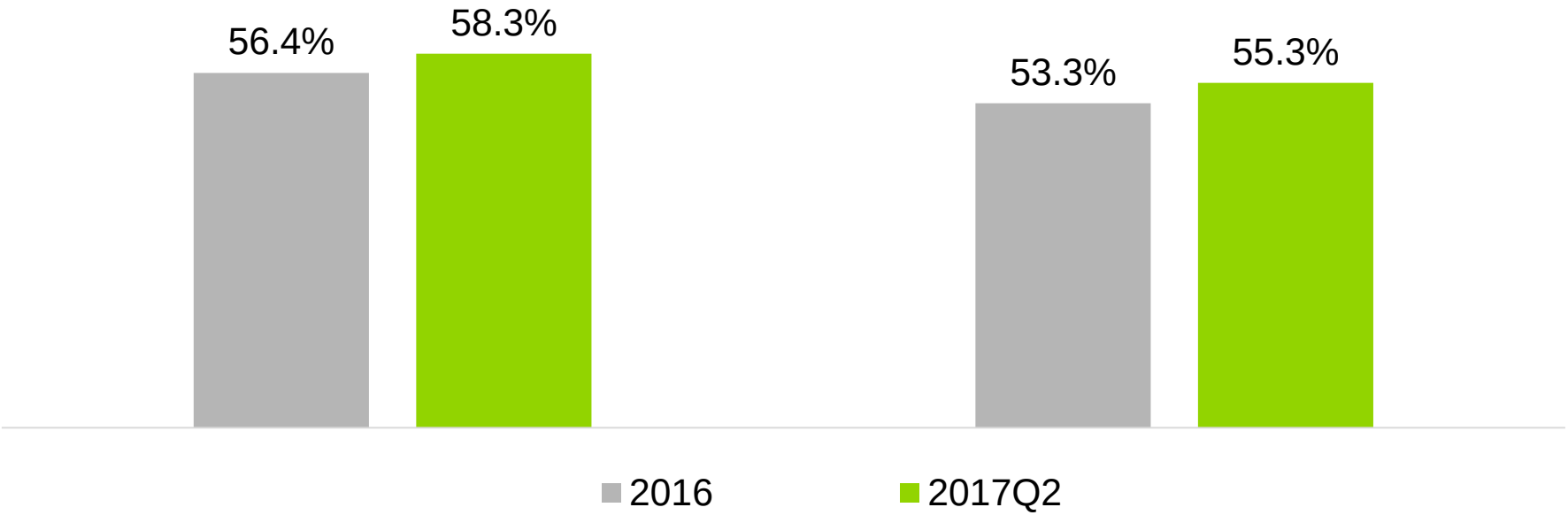
新生代消费者的个性化使得消费升级和平价好货并行
Individualization means opportunities for both luxury and value products

品牌选择非常重要,品牌会反映出我是什么样的人；

Brand choice is important and it reflects who I am

我很乐意多花钱去购买原创的或独一无二的品牌；

I am willing to spend more money on brands either original or unique



数据来源：央视市场研究，CNRS-TGI
Data source: CTR, CNRS-TGI

用户驱动的消费升级以及技术研发的提升使得乐纯的销售在2017增长4倍
Consumer driven premiumisation and R&D helped Lepur expanded sales by 400%

高端化产品：乐纯酸奶每盒平均25元人民币, 每KG单价是酸奶均价的9倍
Premium Products: Lepur Yogurt per box 25 RMB, 9 times higher than yogurt avg price/kg.

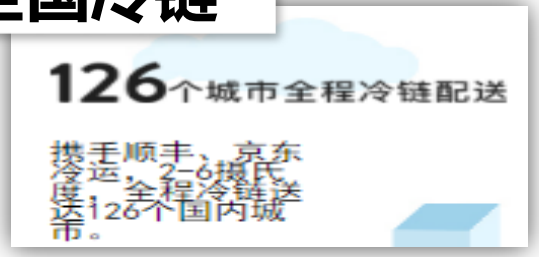
通过技术与体验的加持，进一步推广品牌
Further advertise/distribute brand through technology.

德国进口技术

它是国内真正的滤乳清酸奶

85年滤乳清酸奶德国老牌工艺GEA Westfalia提供技术顾问和设备支持。

覆盖全国冷链



个性化和黑科技的赋能助力奥利奥恢复增长
Individual customization and technology help to rejuvenate Oreo

个性化定制涂鸦包装奥利奥
Can design and order personalized painting package.

通过技术与体验的加持，重新品牌发力
Rejuvenate brand through technology and consumer personal experience

打造新的购物场景
激活购买
Leverage new purchase occasions to activate purchase

场景化，智能化与即时化赋予场新的内涵和外延

The scope of purchase is great extended in the new retail era

场

智能化 (smart)

- ✓ AR/VR
- ✓ iBeacon
- ✓ 无人结账 (un-manned stores)

场景化 (scene)

- ✓ 体验店 (brand store)
- ✓ 快闪店 (pop up store)
- ✓ 卖场+餐饮 (supermarket + dining)

即时化 (instant)

- ✓ 移动支付 (mobile payment)
- ✓ O2O服务(O2O delivery)

品牌需要创造更多真实的体验来拉近和消费者的距离
Brands need to leverage physical space to build real touch with consumers

场

缤纷的户外活动如在外就餐，看电影以及在咖啡馆等第三空间等都能带来巨大机会。
Big opportunities in different OOH occasions like eating out, watching movie & cafe

场

在家烹饪
Cooking In Home

	复合增长率 CAGR (2010-2013)	复合增长率 CAGR (2013-2016)
在家烹饪 Cooking In Home	4%	3%
在外就餐 Eating Out	13%	10%

在外就餐
Eating Out

数据源： 中国烹饪协会; 国家统计局; 中国旅游局； 凯度消费者指数体育小调查，,重度&关键城市,2016年8月,样本=834
Data Source: China Culinary Association; NBSC; National Tourism Board; Kantar Worldpanel Sports Survey, Key & A Cities, 2016P8, R=834

比起户内，户外市场对于某些品类来说是个更大的市场

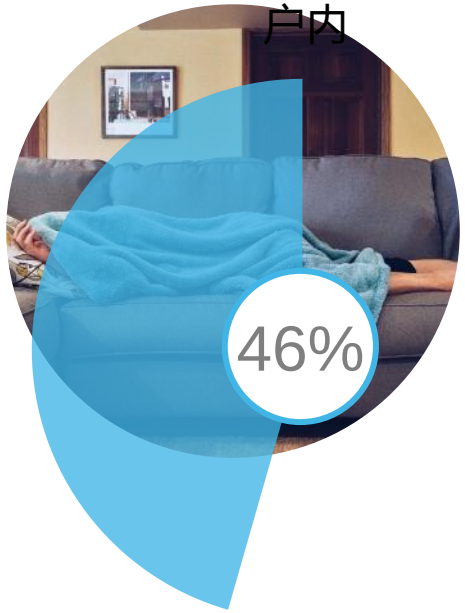
Compared with in-home, OOH market is much bigger for some categories.

户内 vs. 户外 | 关键指标 | 重点、省会城市 | 截至17年6月滚动一年

53
Frequency
频次

44 RMB
Avg. spending / Trip
客单价

5.4
Packs per Trip
次均购买件数



94
Frequency
频次

15 RMB
Avg. spending / Trip
客单价

2.4
Packs per Trip
次均购买件数

- 数据源： 凯度消费者指数家庭样组/户外样组
- Data Source: Kantar Worldpanel Household Panel /Out-of-home Panel
- 覆盖品类包括饮料（瓶装水，功能饮料，亚洲传统饮料，果汁，茶饮，咖啡，碳酸饮料，奶茶），啤酒，零食类（饼干，巧克力，口香糖，薄荷糖，糖果，咸味小食），乳制品（冰淇淋，液体奶，豆浆豆奶，酸奶）
- Total market covers Beverage (Bottled Water, Functional Drink, Asia Traditional Drink, Juice, Tea, Coffee, CSD, Milk Tea), Beer, Snacking (Biscuits, Chocolate, Gum, Mint, Candies, Salty Snacks), Dairy (Ice Cream, Liquid Milk / Flavor Milk, Soy / Soybean Milk, Yogurt)

成功案例 — 悠哈味觉糖
Successful Case – UHA

悠哈推出新品味觉糖，口感更好，内含真果汁
New Product Cororo with better taste and real Juice

可以在办公室做自己的DIY产品
Introduce more DIY food to consume in Office

+86%

17年上半年对比去年
同期销售额增长
Sales Value Growth
17H1 vs. YA

办公室消费次数比例%

Office Consumption Occasion%

12% 总体糖果 total Candy vs

23% 悠哈品牌 total UHA

成功案例 — 七喜
Successful Case – 7 Up

场

在大众点评上发起投票活动
Activity on Dianpin to vote for restaurant

在餐厅或酒吧里用七喜调特饮
Special drinks with 7 Up for restaurants & bars

用代言人直播的形式介绍新品
Celebrity broadcast to introduce special drinks

+14%

17年二季度对比去年同期销售量增长
Sales Volume Growth 17Q2 vs. YA

和朋友聚餐次数比例%

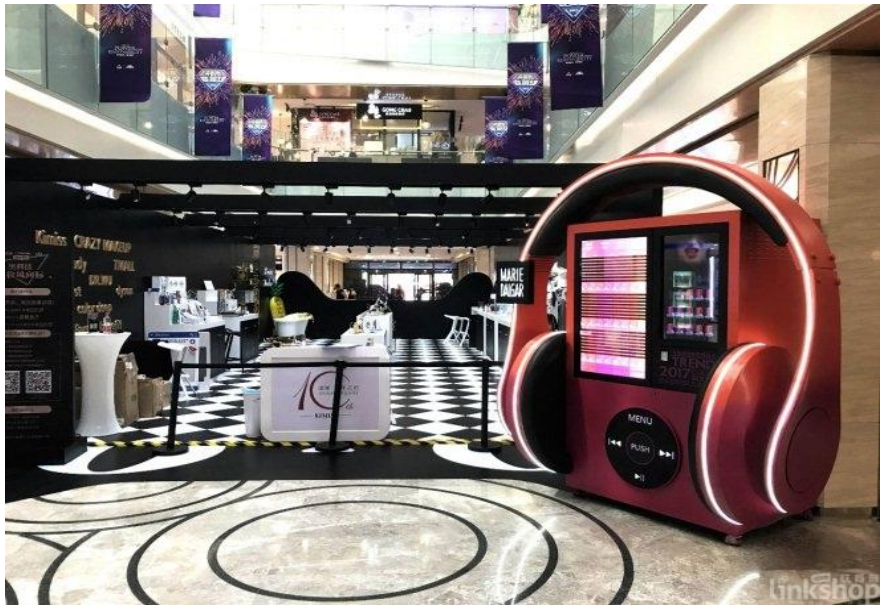
Leisure Meal Together Occasion%

27% 总体碳酸饮料 total CSD vs

38% 总体七喜品牌 total 7Up

通过技术赋能，打造新的流量入口和使用时机

Empowered by technology, new traffic and usage occasions can be generated



Data Source: 凯度消费者指数，家庭饮食样组，以个人为分析基准

新零售时代下的创新思考
Decode Innovation in the new retail era

1

走心：通过情感建立‘心’的连接，用更健康，更省心，更快乐的方式满足新消费时代的需求
Connect through emotions – stimulate consumer demand through healthy, convenience and pleasure

2

拔草：用颜值激发兴趣，让产品自带流量，通过个性化和黑科技激发消费欲望
Stimulate interest by beautiful design and let product speak for itself; use and technology to activate new purchase occasion

3

场景： 营造和品牌有密切关联的新使用和购买场景（特别是互联网技术赋能的户外场景），提升转化
Connect brands with new purchase and usage (especially those OOH occasions activated by internet technology) occasions to drive conversion