CLIENT DAY 2018

FINDING NEW SHOPPERS

寻找全渠道的增长机会

Finding growth opportunities in the context of omni-channel

KANTAR WORLDPANEL

a CTR service in China

零售现状一览
The new landscape

过去三年，零售新名词新概念层出不穷。

Many new terms and concepts emerged in the past year

小红书实体
Little Red Book Offline Store

盒马鲜生
Hema

超级物种
Super Species

天猫小店
Tmall Grocery

自助货架
Unmanned Shelf

苏宁极物
Sunning Jiwu

网易考拉实体
Kaola Offline Store

淘宝心选
Taobao Select

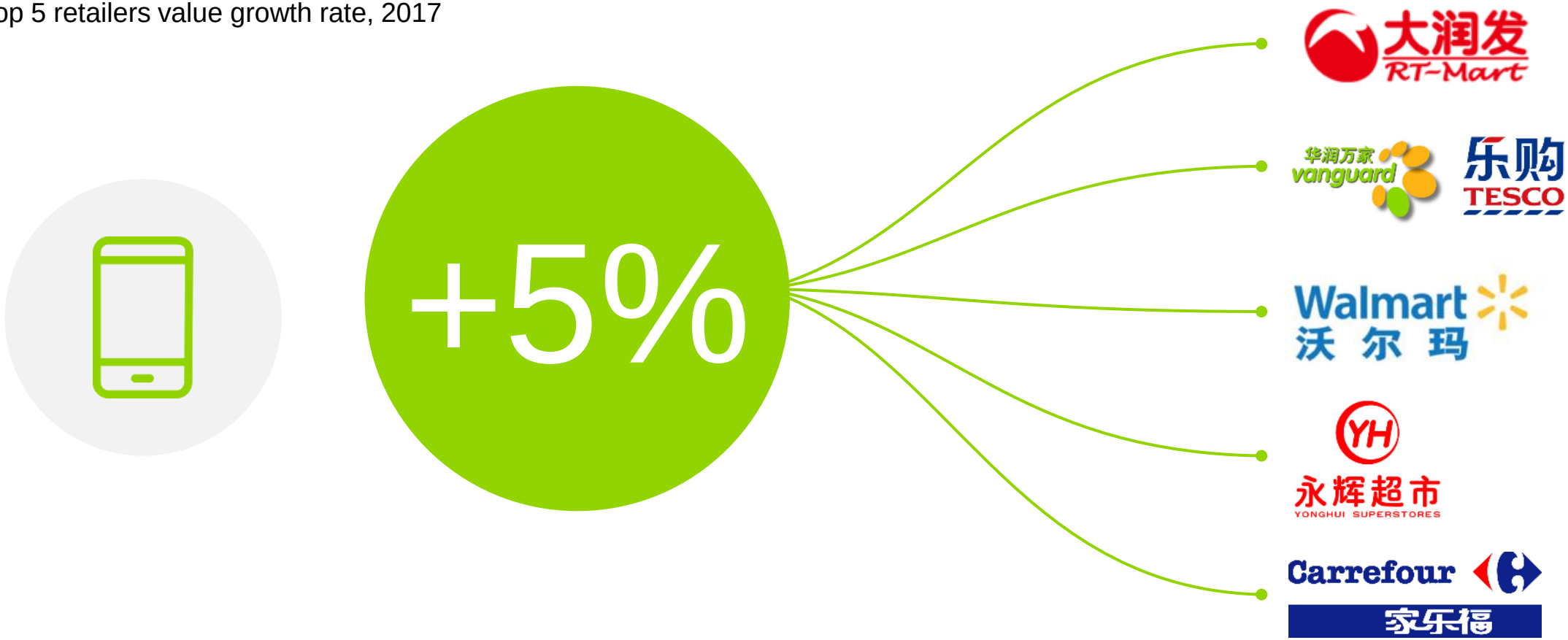
京东便利店
JD CVS

无人店
Unmanned Store

五大零售商通过全渠道战略调整，跑赢大盘。

Top 5 retailers outperform through omni-channel expansion.

五大零售商销售增长率, 2017
Top 5 retailers value growth rate, 2017



数据源:凯度消费者指数，城市家庭样组，截至2017年12月29日的52周
Data source: Kantar Worldpanel, HHP, MAT17P13

过半数消费者会在7+渠道购物：重点城市通路更多元化，年轻人渠道选择较为集中。

Over half of the shoppers purchased in 7+ channels: more choices in key cities while young consumers opt for less channels

7+渠道购买快消品的购物者占比, 2017
Buyer% of shoppers shopping in 7+ Channels, 2017

52%
中国城市
Urban China

57%
重点城市
Key Cities

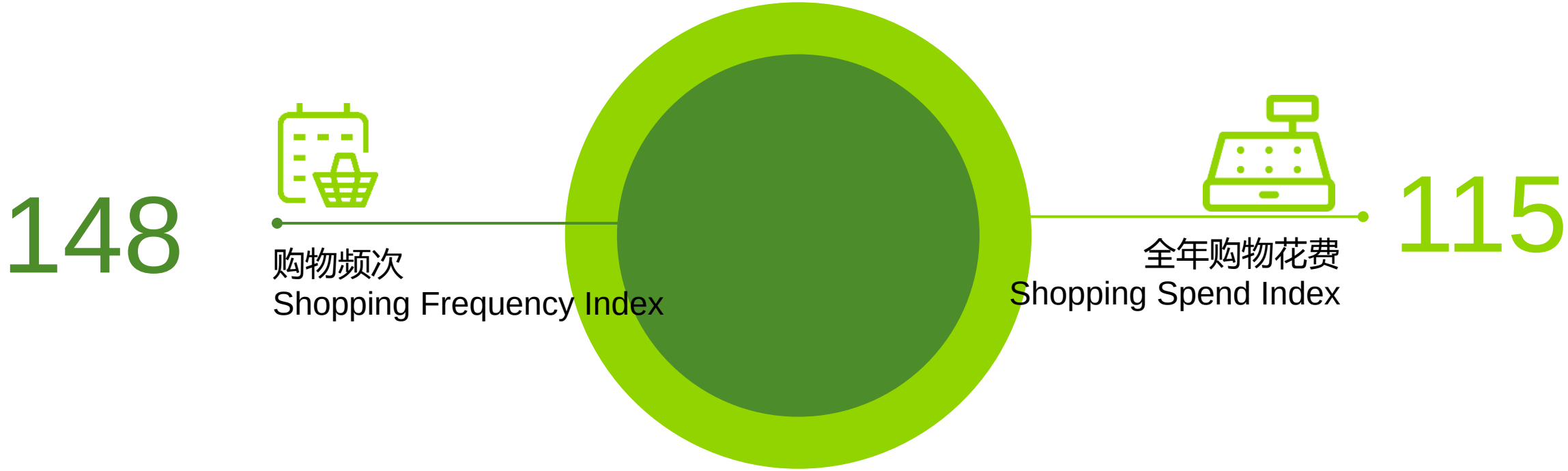
47%
年轻购物者
Young Shoppers

数据源:凯度消费者指数，城市家庭样组，截至2017年12月29日的52周
Data source: Kantar Worldpanel, HHP, MAT17P13

全渠道推动市场增长 --- 全渠道购物者购物更加频繁，价值更高。

Omni-channel helps accelerate growth --- omni-channel shoppers shop more frequently and spend more.

全渠道购物者购物指数，对比非全渠道购物者
Index of omni-channel shoppers, VS. none- omni-channel shoppers



数据源:凯度消费者指数，城市家庭样组，截至2017年12月29日的52周
Data source: Kantar Worldpanel, HHP, MAT17P13

满足购物者需求，创造良好体验依然是零售的核心。

Meeting shoppers' needs and building superior shopping experience remain core of retailing

多样选择
Variety

方便快捷
Convenience

物有所值
Value for Money

零售发生了什么变化？
What are changes in retail?

渠道的边界由鲜明到融合。
Boundary of channels increasingly blurred.

物有所值
Value for Money

多样选择
Variety

方便快捷
Convenience

Walmart 沃尔玛

淘宝网 Taobao.com

全家就是你家 全家 FamilyMart

过去：渠道定位清晰
Past: specific position for each channel

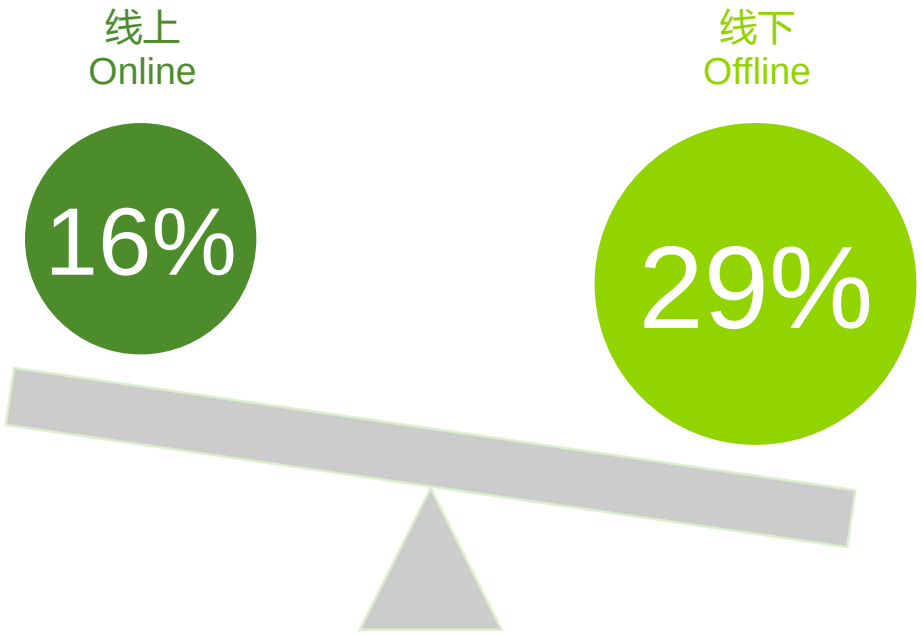
现在：战场边界模糊
Now: blurred boundaries, more convergence

数据源:凯度消费者指数，城市家庭样组，截至2017年12月29日的52周
Data source: Kantar Worldpanel, HHP, MAT17P13

线上火爆的高端，小众，网红产品也在悄悄进入实体店铺，甚至是传统渠道。

Premium, niche brands and emerging brands are also entering online space, even grocery stores

整体快消品前50品牌金额占比， 2017
Top 50 brands value% in total FMCG, 2017



大润发
RT-Mart

天猫小店
Tmall Grocery

数据源:凯度消费者指数，城市家庭样组，截至2017年12月29日的52周
Data source: Kantar Worldpanel, HHP, MAT17P13

零售的主体，关系与内容被重新定义。
Omni-channel redefines the subject, relationship and content of retail.

新主体
New object

购物者是零售中心。
Shoppers back to the core of retail.

新关系
New relation

渠道赋能品牌商与购物者多维度互动，创造一致卓越的体验。
Channels empower brands to create consistent and superb experience.

新内容
New content

内容多角度统一驱动，引发传播。
Content is driving multi-dimensional activation and triggers WOM

数据源:凯度消费者指数，城市家庭样组，截至2017年12月29日的52周
Data source: Kantar Worldpanel, HHP, MAT17P13

如何应对改变
How to respond to changes?

零售商与品牌商迎来新的机遇。

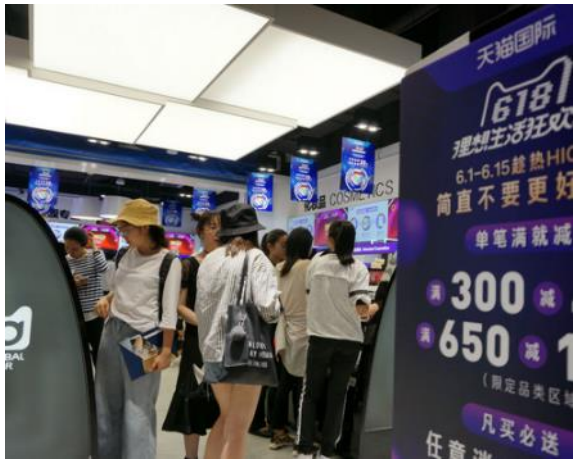
Omni-channel brings opportunities to both retailers and brands

线上线下流量管理；场景与品类联动

Online & offline traffic and purchase convergence

全渠道营销，线上线下联动

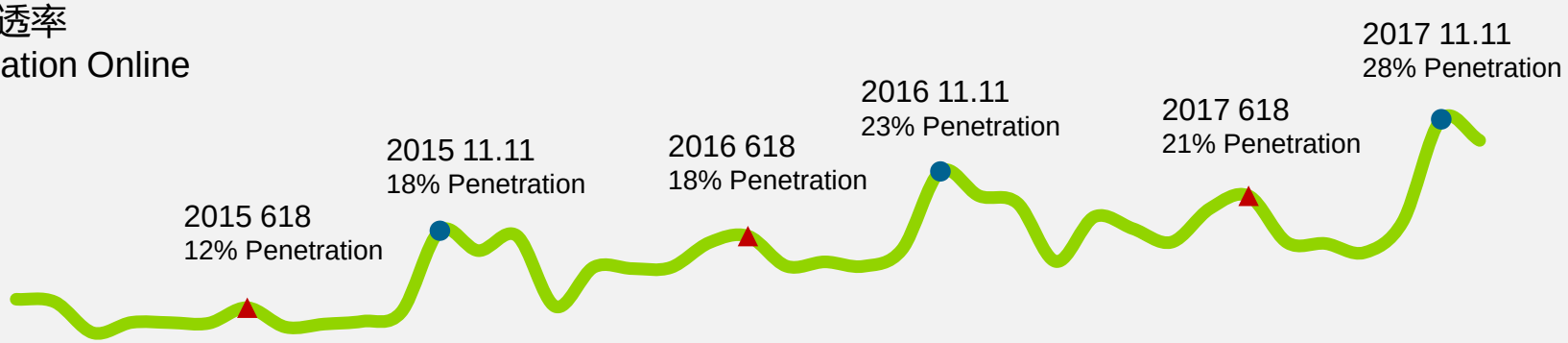
Omni-marketing and online & offline unified activation



年中年度相互大促，推动电商和实体店铺协同增长。

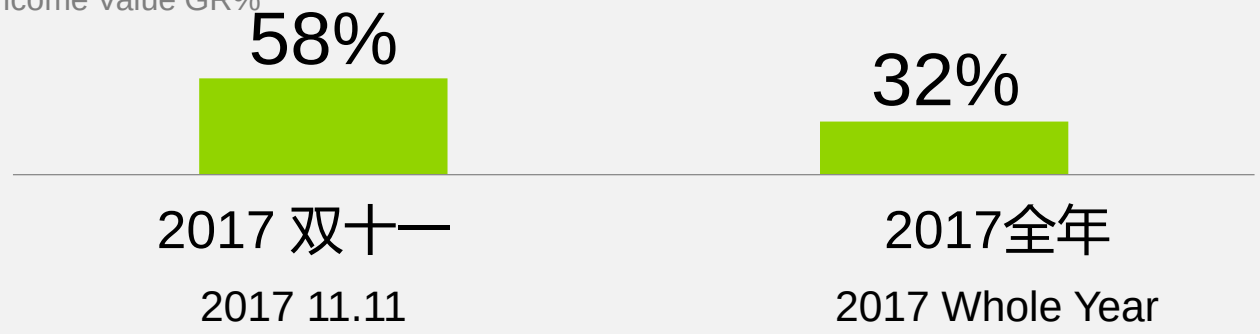
Online and offline synchronization through mid-year and Double 11 festivals

线上快消品渗透率
FMCG Penetration Online



兰蔻/银泰/天猫 携手打造双十一嘉年华
LANCOME/INTIME/TMALL Co-create Growth through Singles Day Carnival

兰蔻销售额增长率
Lancôme Value GR%



数据源:凯度消费者指数，城市家庭样组，截至2017年12月29日的52周；美妆样组，截至2017年12月29日的52周
Data source: Kantar Worldpanel, HHP, MAT17P13, Beauty Panel, MAT17P13

科技赋能场景，提高消费者体验。

Technology empowers creation of new occasions & enhancement of experiences

派样机为公众号圈粉

Sampling machine brings more followers

线下一扫即知线上点评

Scan in offline stores to read online commentaries

魔镜省时，尝试更多妆容

AR make-up to save time and entice more trials

扫码购让购物快快快

Scan & Go makes shopping easy

线上线下联动，让年轻购物者爱上实体购物。

Online & Offline interaction drives young shoppers back to the physical stores.

110

年轻家户单一渠道购物倾向性
Preference of shopping in <7 channels
for young families

天猫旗舰店（清扬）+ 大润发
Clear Flagship Store + RT-Mart

115

年轻家户购买清扬樱花倾向性
Preference of Clear
for young families

数据源:凯度消费者指数，城市家庭样组，截至2017年12月29日的52周
Data source: Kantar Worldpanel, HHP, MAT17P13

全渠道互动，环绕挑逗年轻消费者。

Multiple interactions to stimulate young consumers' purchase

立顿茶包年轻消费者倾向性
Young shoppers index of Lipton Tea Bag

173
MAT 18 P6

社交传播
Social Spread

上海服装周快闪店铺
Pop-up Store

线上AR与购买
AR experience and buy

朋友圈种草
WeChat Moment

数据源:凯度消费者指数，城市家庭样组，截至2017年12月29日的52周
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全渠道营销环境下的启示。
Implications to brands in the omni-channel world

01

企业必须向数据/洞察驱动转型，通过消费者在不同渠道的购买行为生成专有数据，以支持创新和全渠道策略。

Brands need to turn into data and insight driven business, with proprietary consumer data to enable product innovation and omni-channel strategy

02

评估渠道重要性，了解不同渠道购物者的购物者旅程以及决策顺序 以优化渠道投资。

Evaluate the importance of each channel and understand the consumer journey and decision hierarchy across channels to optimize investment across channels

03

渠道即媒体---洞悉全渠道营销投资的优化组合，推动消费者从认知到转化并成为品牌的粉丝

Retail Channels are also media --- deeper understanding how your investment in online and offline stores drive awareness to loyalty

THANKS

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