CLIENT DAY 2018

# FINDING NEW SHOPPERS

## 掘金下线城市婴儿市场

## Uncover growth potential of Baby Market in lower tier cities

KANTAR WORLDPANEL

a CTR service in China

3,85M

美国2017年新出生人口

2017 newborns
in the United States

3,94M

中国**下线城市***2017年新出生人口

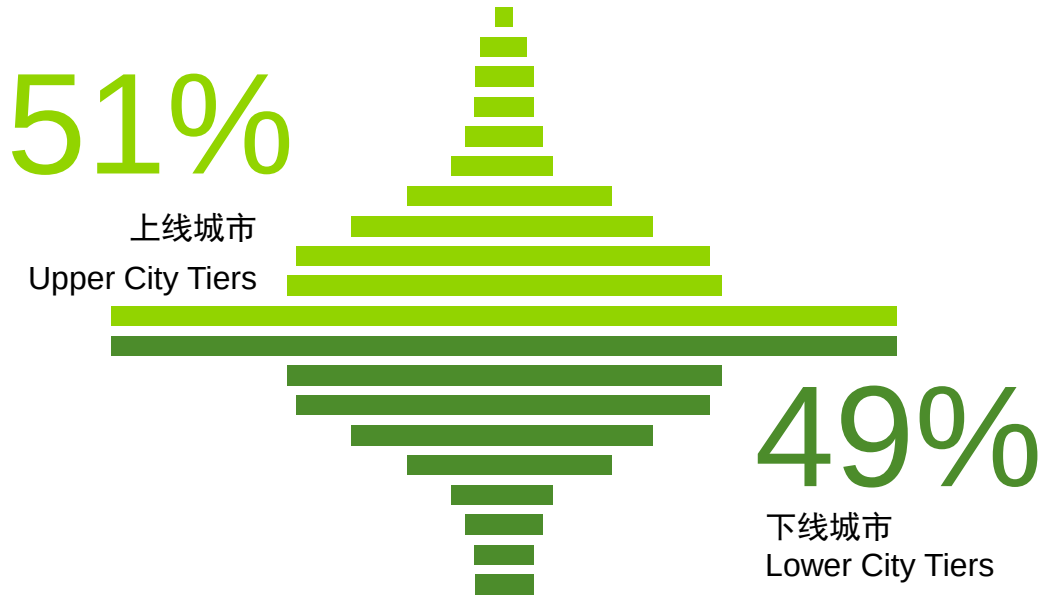
2017 newborns
in China lower city tiers

*凯度消费者指数估算下线城市2017年新生儿数量

# 广阔的天地
## Market is big

**0-3岁婴儿人口数量**
0-3 Years Baby Population

**婴儿用品金额占比**
Baby Categories Value Share



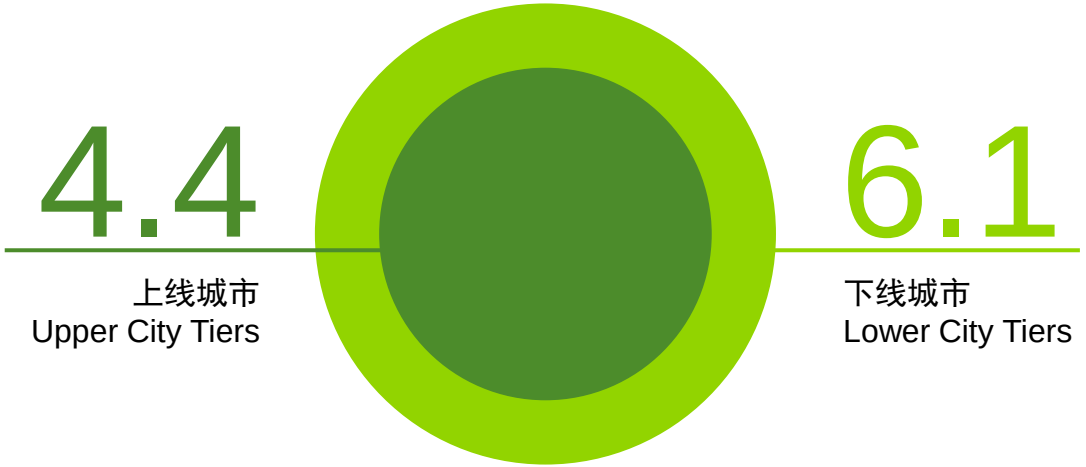



数据来源：凯度消费者指数全国婴儿样组

# 消费升级的空间
## More room to upgrade consumption power

婴儿用品人均消费
下线是上线城市的2/3

Lower tier cities spend per buyer on baby products are two thirds of upper city tiers



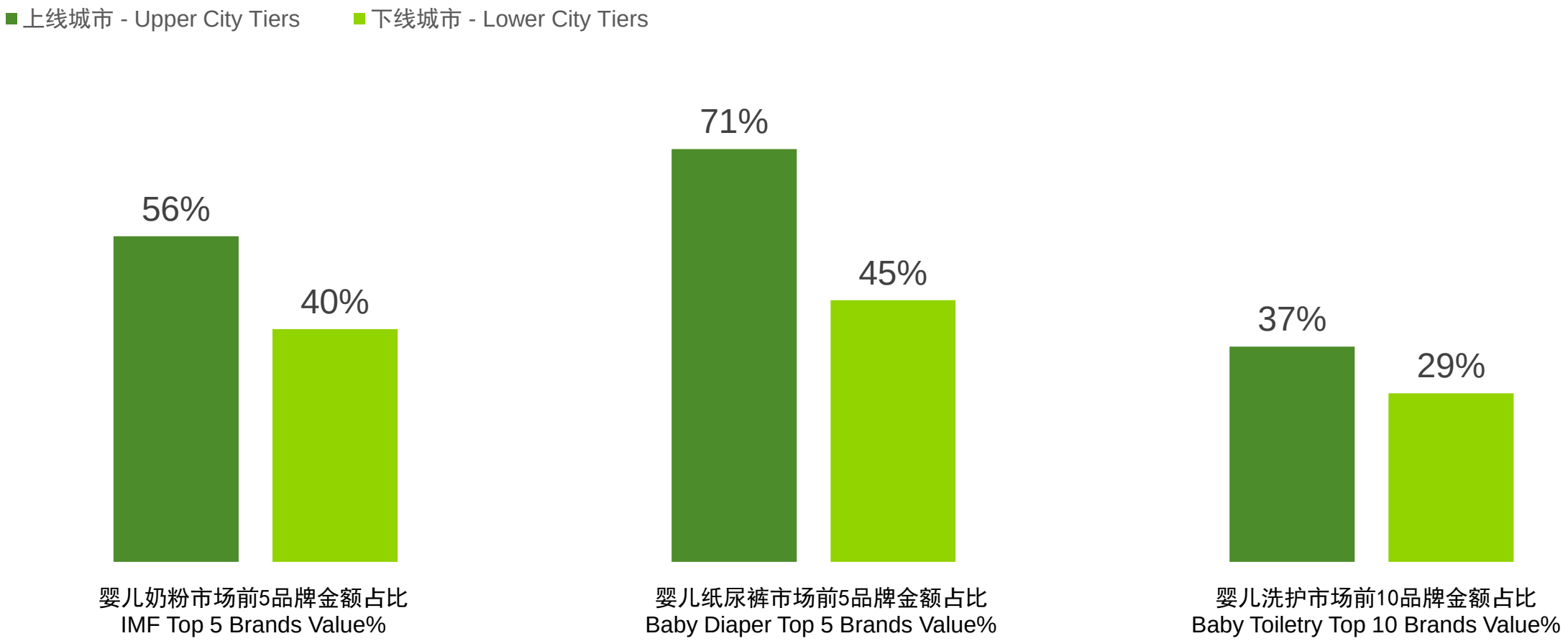

快消品花费
2012-2017年复合增长率

2012-2017 FMCG Spending CAGR



数据来源：凯度消费者指数全国婴儿样组
凯度消费者指数全国家庭样组

# 填补空白市场的机会
## Growth opportunities for leading brands






数据来源：凯度消费者指数全国婴儿样组

# 下面哪些描述符合下线城市妈妈的购买行为？

**Which of the following statement about lower city moms is true?**

**粗放式育儿**
**Only buy essentials**

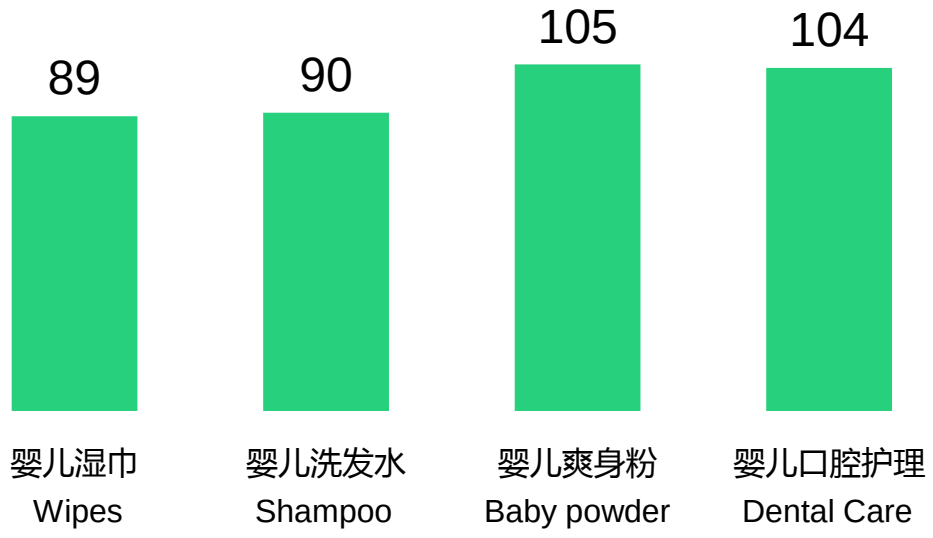
**买的便宜**
**buy cheap**

**网购人数少**
**Don’t shop online**

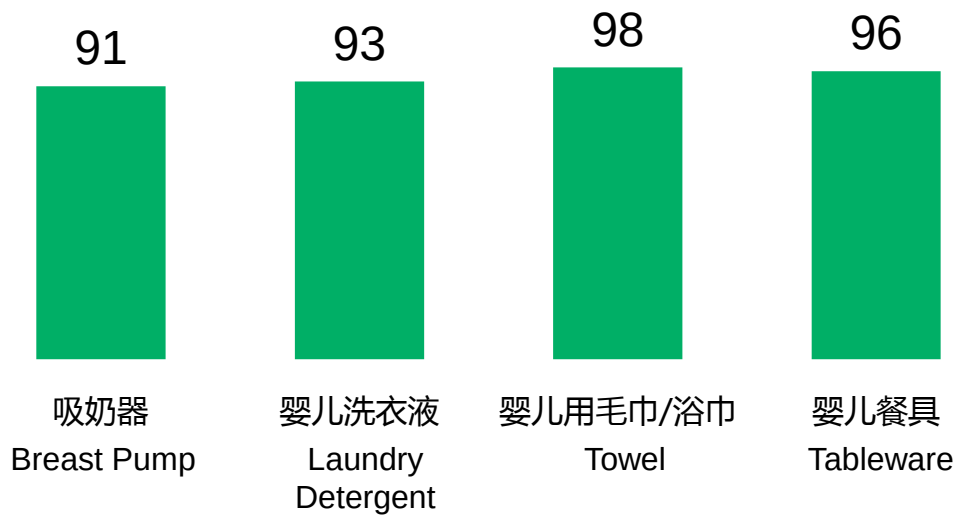
# 上下线城市购买人数差距不大

## In lower city tiers, moms don’t buy only the essentials

上下线购买人数差异指数
Penetration Index - Lower City Tiers vs. Upper City Tiers




上下线表示已购买或打算购买人数差异指数
Claimed Buyer or Willing to Purchase Buyer Index



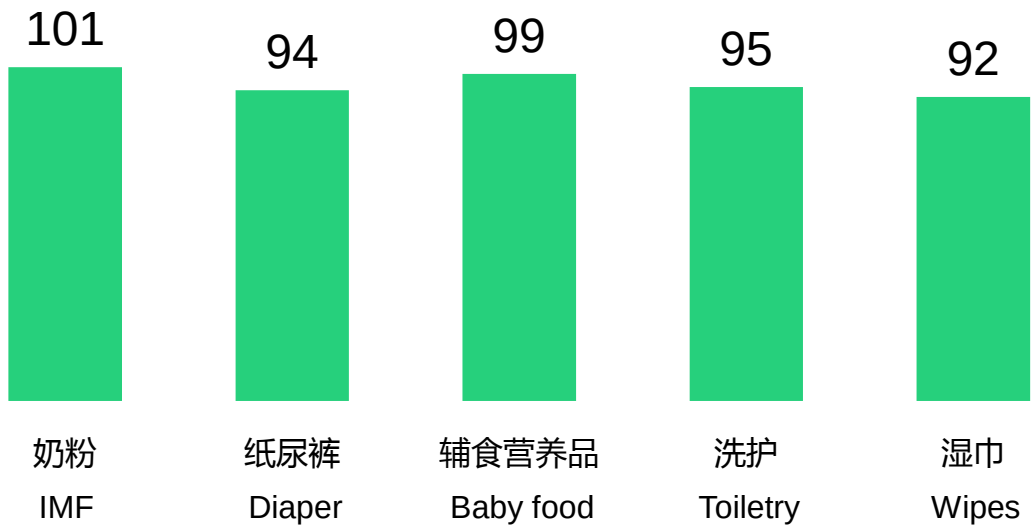



数据来源：凯度消费者指数全国婴儿样组&产前问卷
购买人数差异指数：下线城市消费者购买人数/上线城市消费者购买人数 *100

# 再苦不能苦孩子，更偏爱本土高端

## In lower city tiers, moms also favor premium, especially IMF

### 上下线婴儿用品平均价格差异指数
Average Price Index - Lower vs. Upper City Tiers




### 下线城市高端奶粉
Lower City Tiers Premium IMF

FIRMUS 飞鹤 一贯好奶粉

No.1

376
RMB/KG



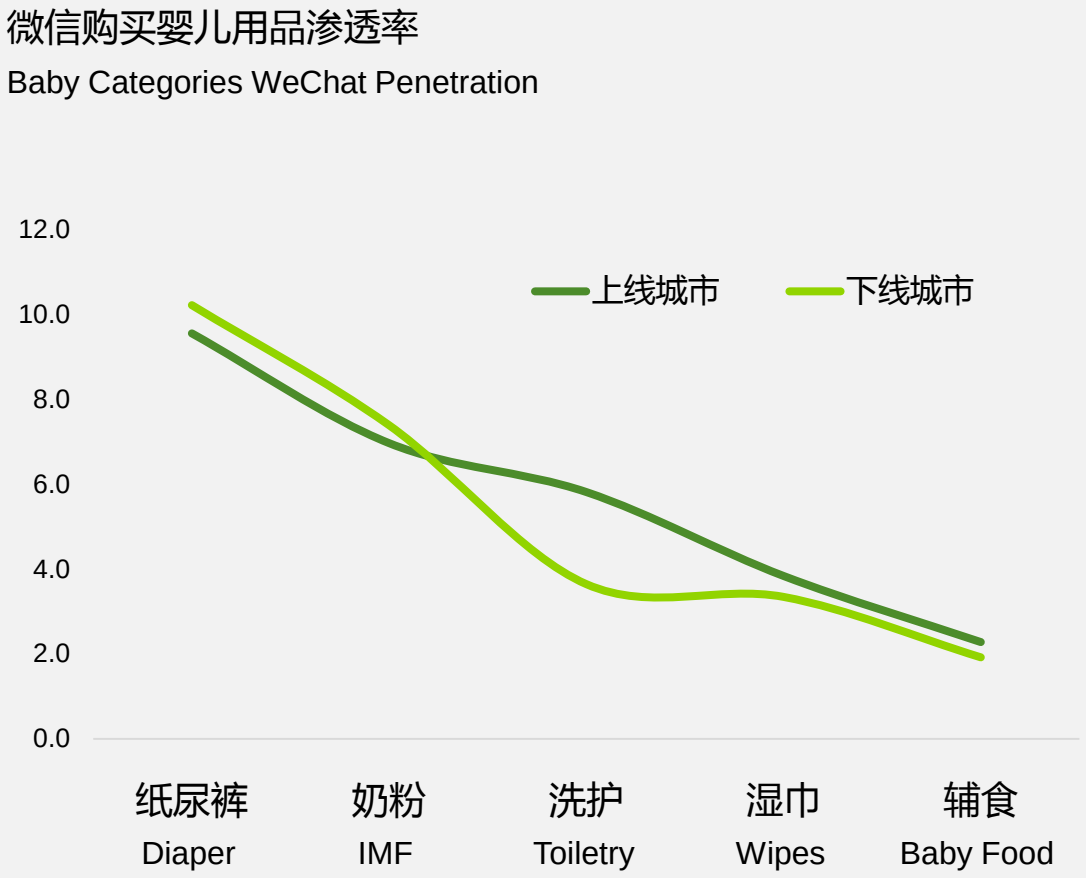
数据来源：凯度消费者指数全国婴儿样组
价格差异指数：下线城市消费者平均价格/上线城市消费者平均价格 *100

# 网购实力不俗，积极拥抱微信渠道

## In lower city tiers, moms like to shop online, especially through wechat

的下线城市妈妈
网购过婴儿用品
of lower cities moms purchased baby products online

的下线城市妈妈
用微信购买婴儿用品
of lower cities moms purchased baby products via WeChat






数据来源：凯度消费者指数全国婴儿样组

# 紧密的人际关系助力社交网络购买渠道

## Strong personal relationship can help brand drive social commerce

Care Daily 凯儿得樂

62%

的购买金额来自微信
Sales from WeChat

高效的需求反馈机制
Efficient Demand Feedback System

凯儿得乐游泳纸尿裤
Diaper for Swimming Occasion



数据来源：凯度消费者指数全国婴儿样组

# 针对下线城市妈妈的发展机会…

**In lower tier cities, there are opportunities to …**

**细分品类拓展**
**Develop Niche Categories**

**持续消费升级**
**Trade Up**

**善用社交媒体**
**Maximize impact of social media**

# 如何更有效地抓住下线城市妈妈？

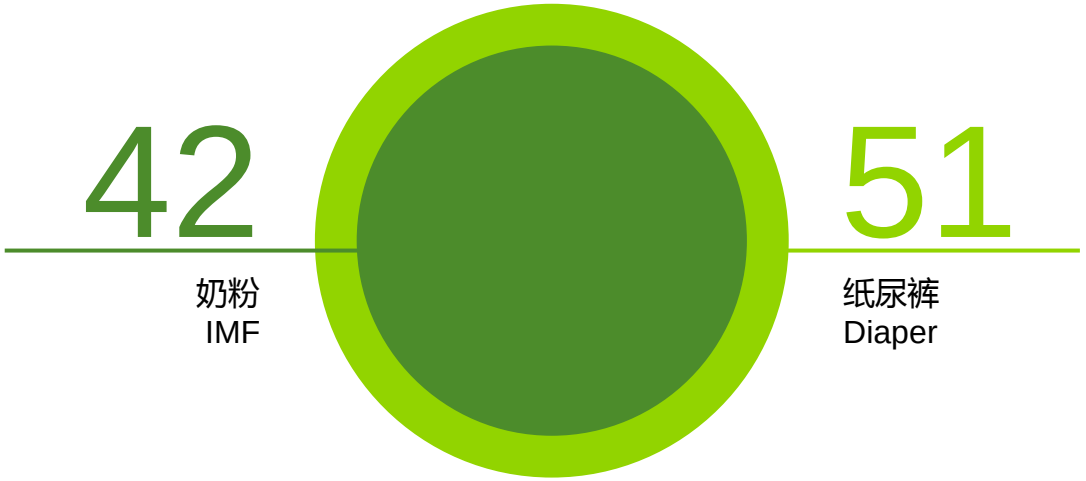
# How to play smart in lower tier cities?

# 产前是影响品牌选择的重要时机

## Pre-born stage is crucial to influence brand choice

下线妈妈在**6个月**孕期及之前开始学习婴儿产品知识
At least 3M before the baby is born, lower tier mums start to learn about Baby Products

下线城市妈妈首次购买奶粉或纸尿裤产前人数占比
First Purchase on IMF & Diaper Before Baby birth in Lower City Tiers



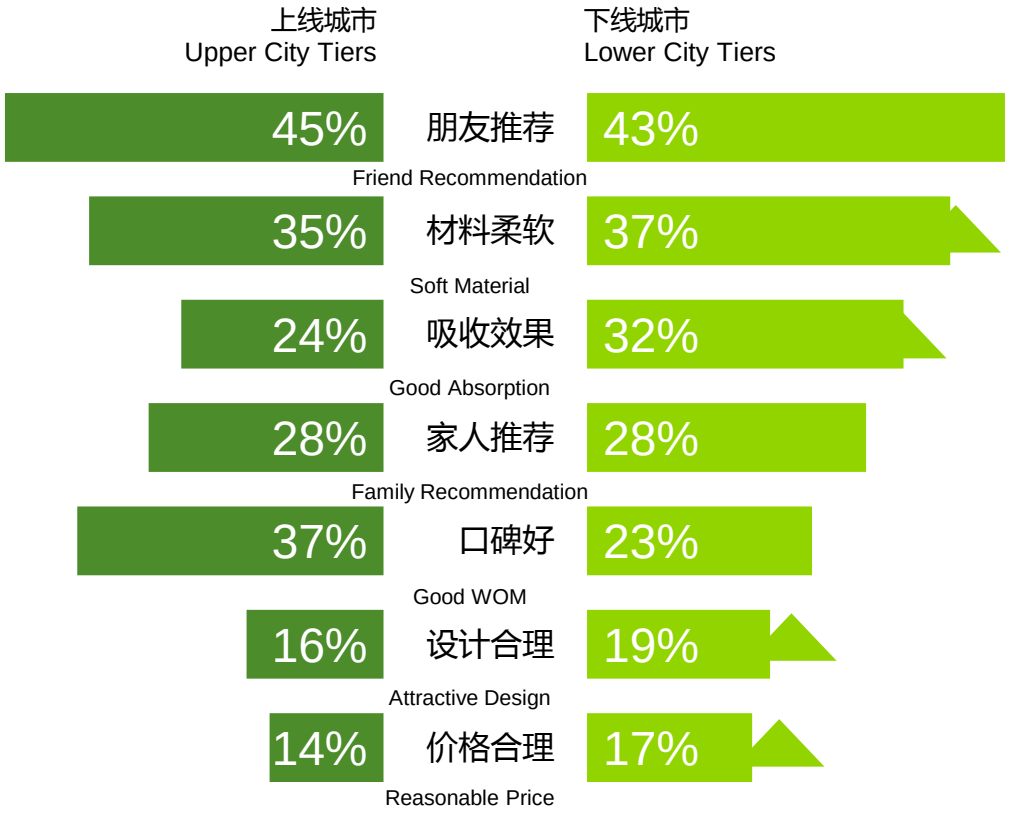



数据来源：凯度消费者指数全国婴儿样组

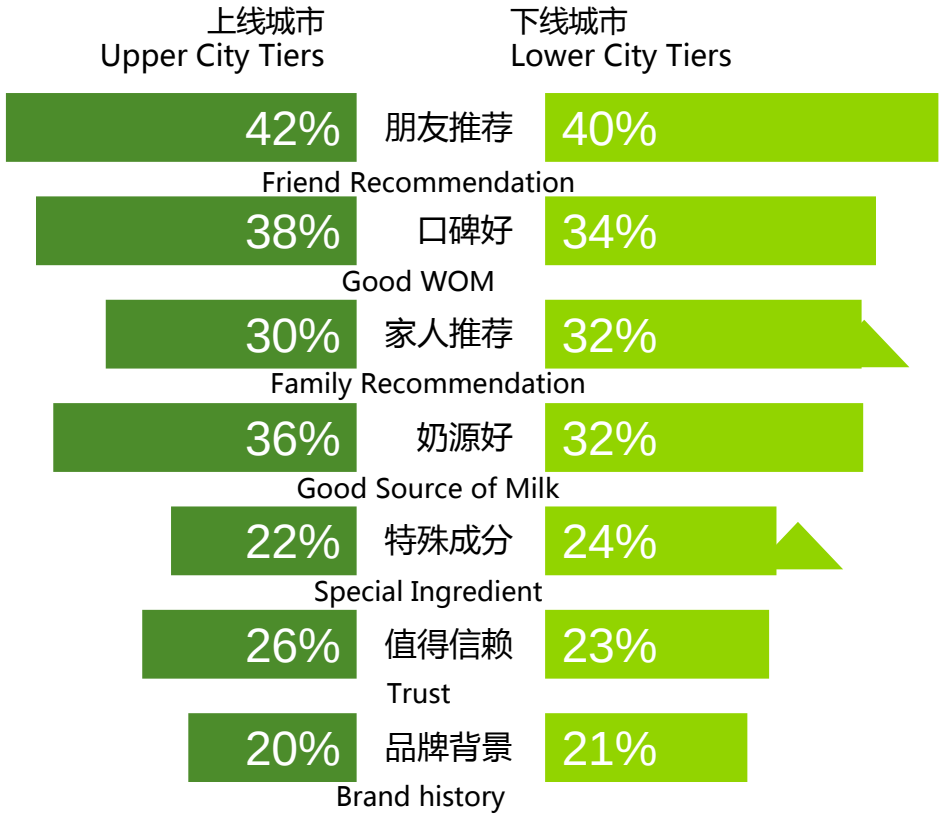
# 更看重产品的实际功能和性价比

## Physical function and value for money are still critical

选购婴儿纸尿裤考虑的因素消费者占比
Reason to Purchase Diaper by Buyer%




选购婴儿奶粉考虑的因素消费者占比
Reason to Purchase IMF by Buyer%

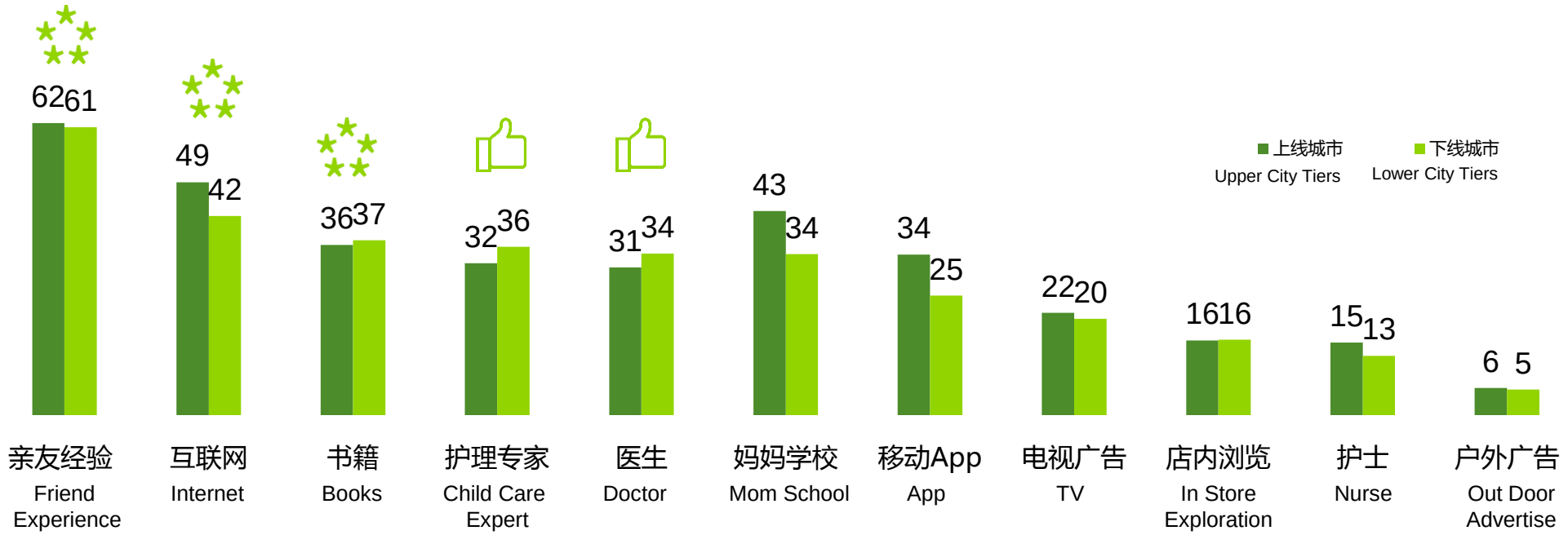





数据来源：凯度消费者指数全国婴儿样组产前问卷

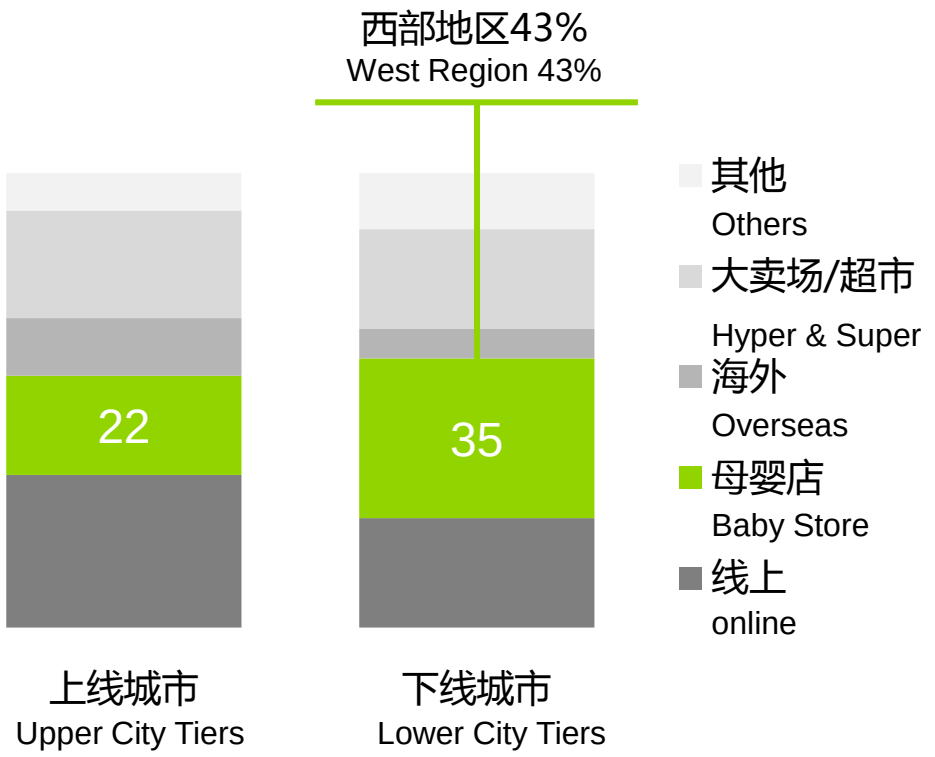
# 与专家合作，突出品牌的专业形象
## Professional brand image

获得婴儿用品信息的途径消费者占比
Source of information for Baby Products Buyer%

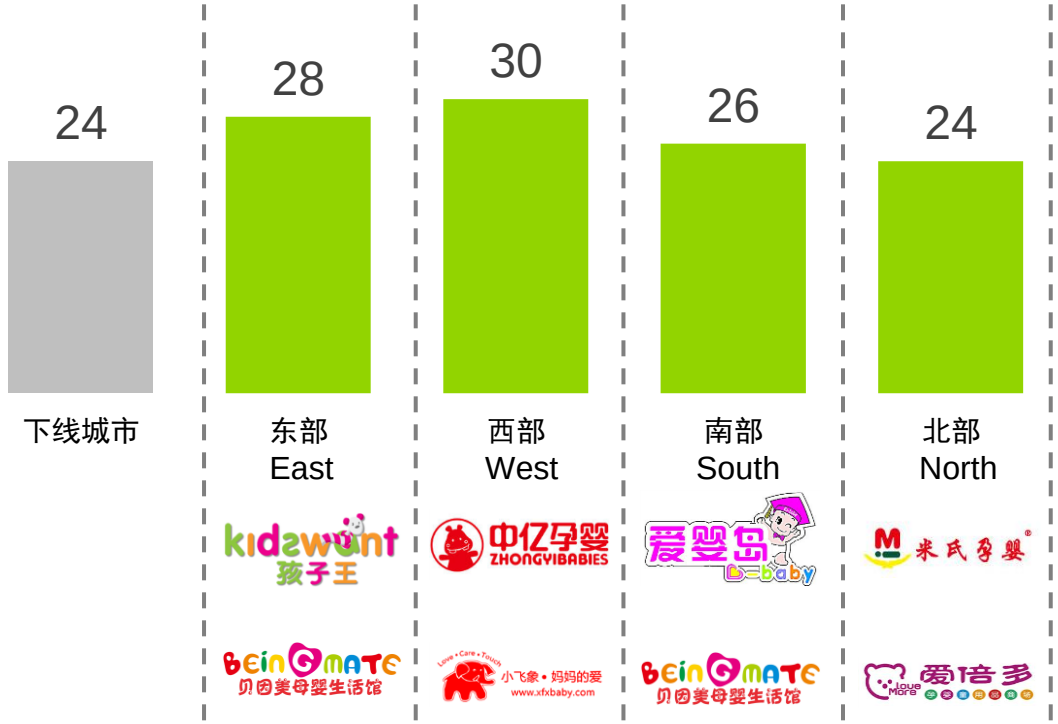


# 深耕母婴店
## Expand brand presence in baby stores

婴儿用品渠道金额占比
Baby Categories Value%




下线城市各区域母婴店前十零售商金额占比
Top10 Baby Store Retailers Value% by Region in Lower Tier Cities



# 线上线下融合
## Omni-channel opportunities

爱他美 X 孩子王 X 腾讯
Aptamil with Kidswant and Tencent

美赞臣 X 京东
Mead Johnson with JD

天猫智慧母婴室
Tmall Smart Nursing Room

# 要更好地挖掘下线城市妈妈潜在商机
## To tap into opportunities in lower tier cities

### 理性的追求
**Aspiration for quality**

**实际功能**
Physical functions

**高性价比**
Value for money

### 紧密的人际关系
**Relationship sells**

**社交媒体**
Maximize impact of social media

**专业导流**
Expertise to drive traffic

### 新零售的探索
**Ride on new retail**

**消费者拓展**
Reach new shoppers

**现代物流/高科技赋能**
Supply chain/tech to empower

# THANKS

KANTAR WORLDPANEL

a CTR service in China