CLIENT DAY 2018

FINDING NEW SHOPPERS

把握场景，理解需求，玩转市场

Drive purchase opportunities through specific consumption moments

KANTAR WORLDPANEL
a CTR service in China

Peppa Pig
Oink!
Peppa
George

Peppa Pig

Peppa Pig

我们尝试全面观察同一个消费者一周的购买和使用行为。

This is an attempt to observe the purchases and usages of a consumer in a week.

重点城市+省会城市
K+A City

Shoppers
购买者

Users
使用者

在哪里?
Where

谁?
Who

什么时间?
When

什么产品?
What

为什么?
Why

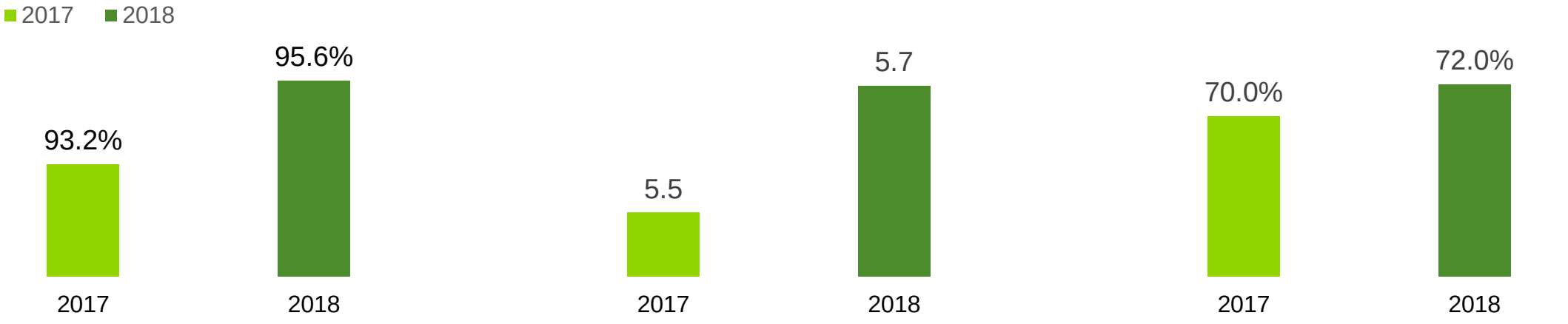
覆盖从早到晚的重要消费场景

Covering all important moment during a day

	早餐 Breakfast	上午茶 Morning Break	午餐 Lunch	下午茶 Afternoon Break	晚餐 Dinner	夜宵 After Dinner
消费重要性% Occasion%	29%	6%	23%	8%	29%	4%
消费次数增长率 Occasion Growth	+5%	+15%	+11%	+15%	+3%	-10%

消费者更重视早餐

Consumers pay more attention to breakfast.



早餐人群
Weekly Penetration

早餐频次
Weekly Frequency

备餐时间小于20分
Preparing Time below 20 Min

营养均衡、美味丰盛是赢得早餐市场的两大利器。消费者对早餐的高品质追求凸显。
Nutrition and taste are top reasons for breakfast choice, with growing demand for health and quality.

	营养均衡 Nutrition	美味丰盛 Flavor	日常习惯 Habit	健康 Health	高品质 Quality
原因重要性 % Occas	19%	14%	14%	13%	4%
原因重要性指数 % Occas index on TTL. Moment	109	100	86	106	121

激烈角逐的早餐市场，三大阵营齐聚。

Diversified choices to compete for breakfast occasions.

永和大王

庆丰包子铺
Qing-Feng Steamed Dumpling Shop
北京华天饮食集团公司

FamilyMart

7 ELEVEN

好邻居

OurHours 全時

基于早餐场景 In Breakfast Moment

饼干周消费人数： 2.4% → 10.9%
Biscuit Weekly Penetration

2015年底，亿滋引入焙朗，重点营销早餐场景，MDLZ launched Belvita to step into breakfast occasion

豆奶周消费人数： 5.6% → 15.3%
Soybean Milk Weekly Penetration

还带动了大豆在早餐期间的消费
Halo Effect on Bean usage in Breakfast

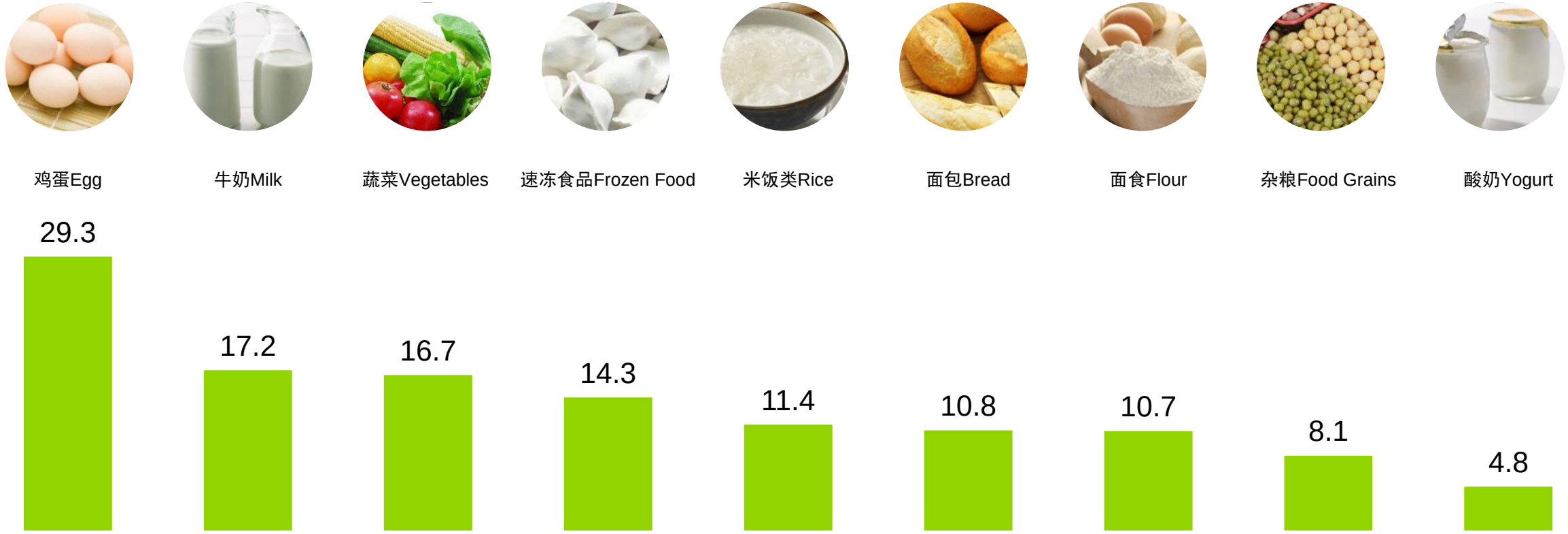
周消费人数：2.6% → 7.7%
Weekly Penetration

食用油周消费人数：
Cooking Oil Weekly Penetration

26.9% → 32.2%

消费者最常选择的早餐产品
Top choices for Breakfast

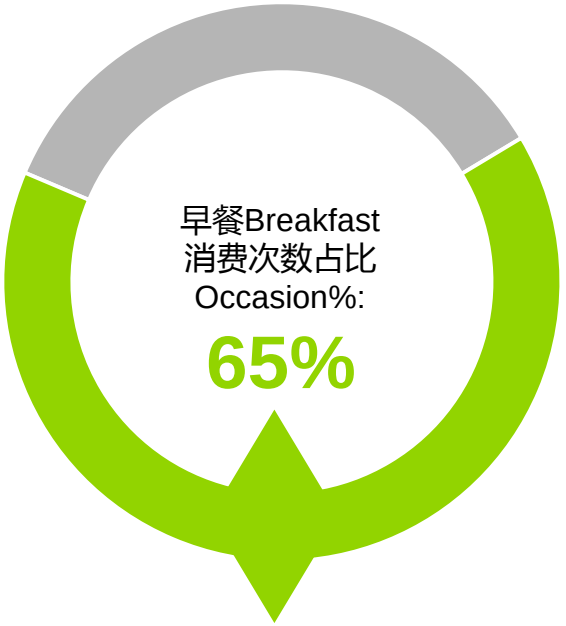
早餐最常被选的品类 Top Categories for Breakfast
周次数占比 Weekly Occasion% - 2018Q2



抓住年轻消费者，牛奶在早餐市场会有更好表现。

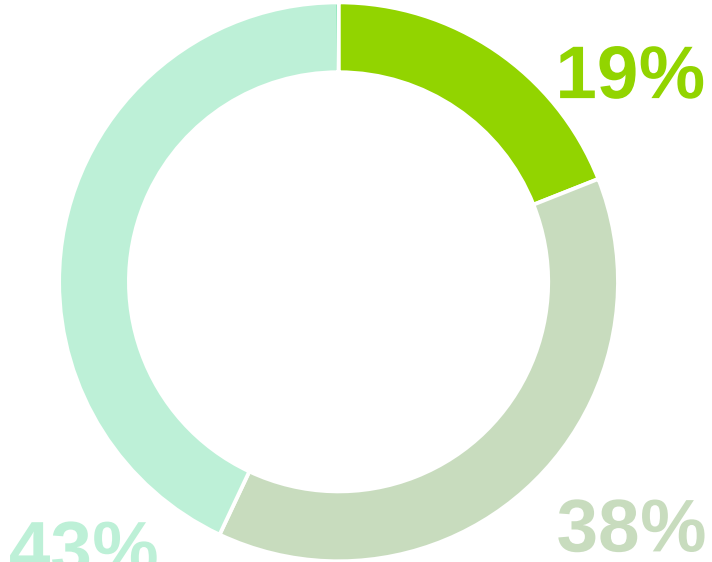
How to grab the attention of young consumers (under 24) is critical for milk as breakfast.

牛奶
Milk



185 亿

18.5 Billion RMB



早餐最常与牛奶搭配的品类
Top Categories with Milk in Breakfast Occasion

1 面包 Bread

2 鸡蛋 Egg

3 火腿/培根 HAM/BACON

4 速冻食品 Frozen Food

备注：牛奶：常温液奶+低温牛奶 Milk：UHT+Fresh Milk

决胜下午茶
Win in Afternoon Break Moment

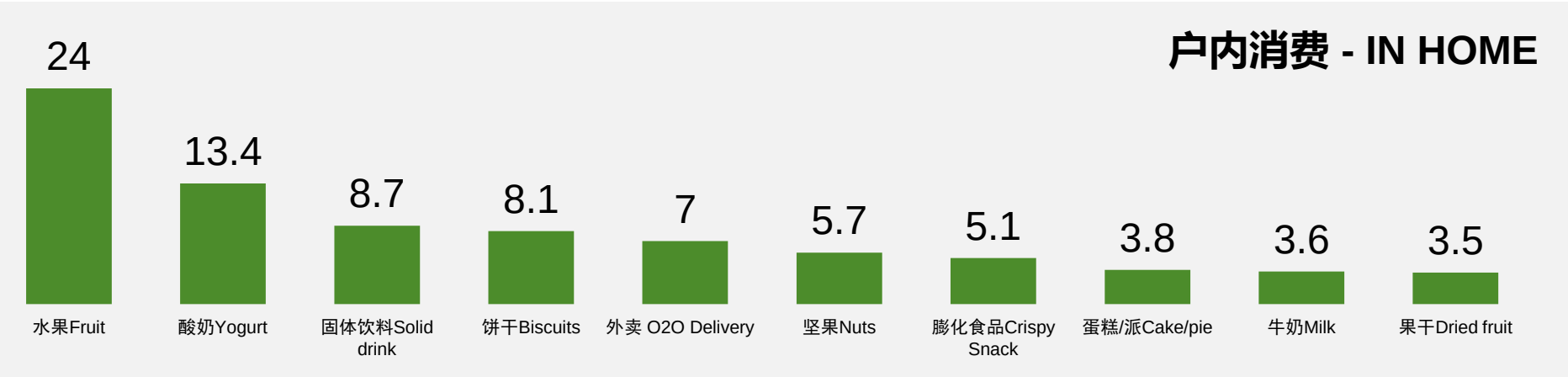
下午茶原因，按原因重要性排序
Reasons for Afternoon Moment，Ranking by reasons for choice

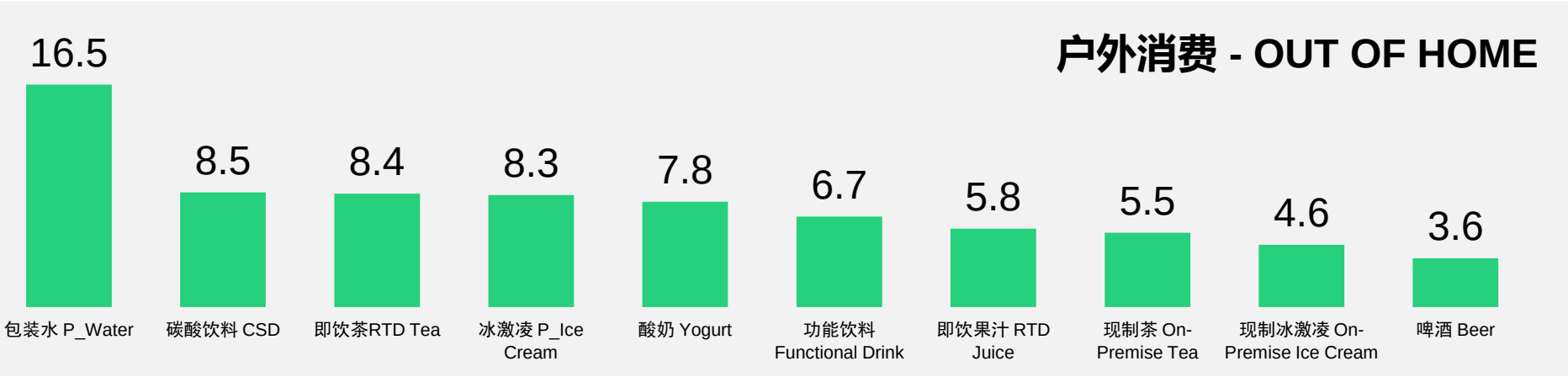
户内消费
IN HOME

户外消费
OUT OF HOME

下午茶最常被选择的品类

Top categories in Afternoon Break Moment





“口味”和”解渴”致胜果汁市场下午茶。

Flavor is most important reason for juice consumption in home while thirsty crunch more important for OOH consumption.

原因 Reasons	下午茶户内消费 Afternoon Tea In Home
口味 Flavor	33%
活力 Vitality	20%
解渴 Thirsty	24%
搭配小食 Match Snacks	14%

原因 Reasons	下午茶户外消费 Afternoon Tea Out of Home
解渴 Thirsty	27%
健康 Health	9%
口味 Flavor	21%
习惯 Habit	6%

冷压鲜榨果汁从味觉、健康和解渴上满足消费者需求

NFC Juice successfully becomes a growth leader in OOH market.

价格指数
Price Index

227

增加650万消费者
+6.5 million consumers

NFC渗透率，基于重点城市+省会城市，
MAT18P6 VS LY
NFC Penetration %, in K+A City

7.2% → **10.3%**

消费场所比重，重点城市+省会城市
MAT18P6 VS LY
Consumption Place Occasion% in K+A City

In the Office
23%

On the Street
21%

Shopping
21%

从肥宅水拓展到户外不同场景 。

Vita Tea successfully grows Out-of-home occasions.

Vita Tea grows

+36%

消费场所重要性，重点城市+省会城市，MAT18P6 VS LY
Consumption Place Occasion% in K+A City

On the Street
27%

In the Office
20%

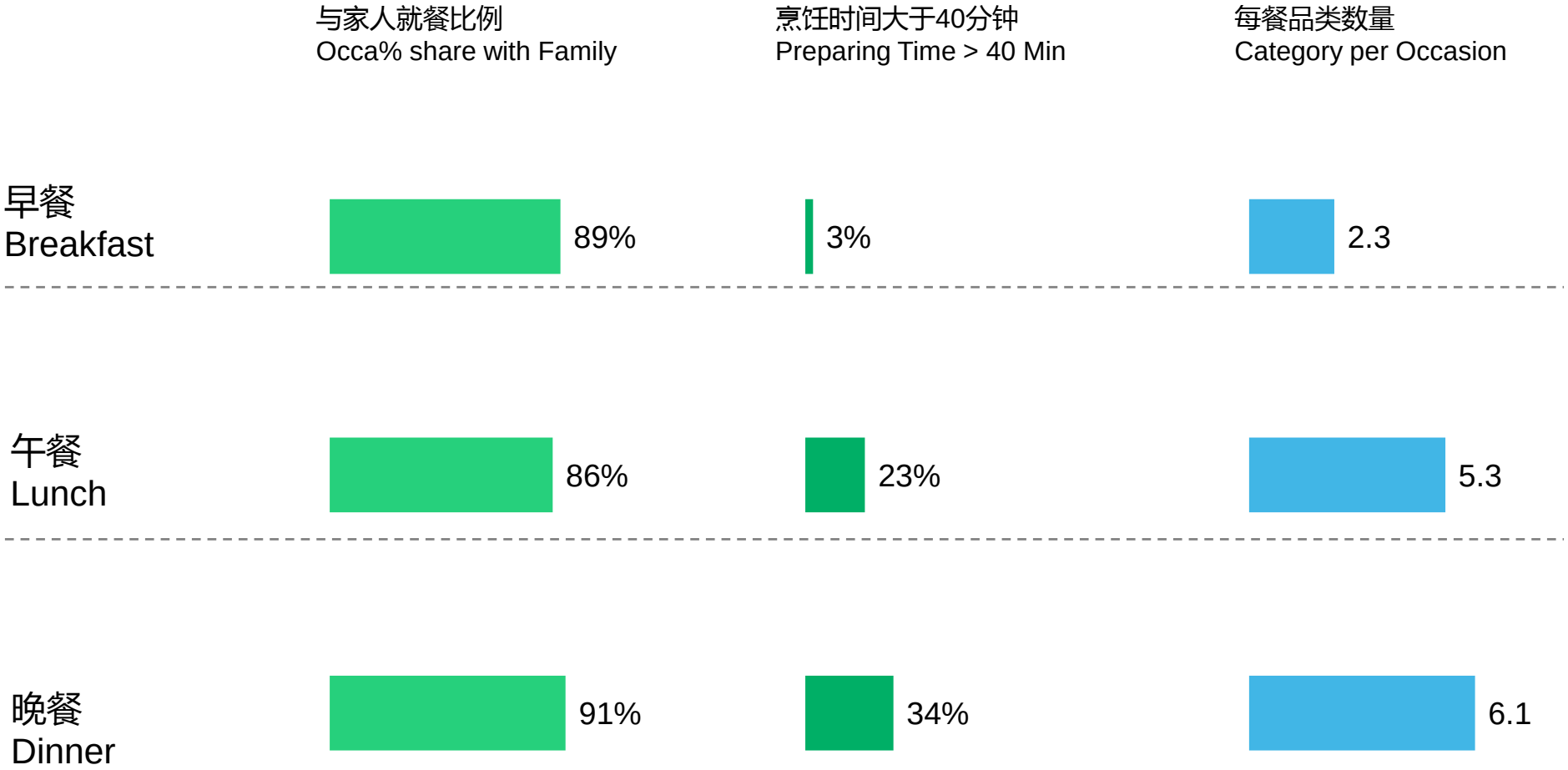
Shopping
19%

晚餐，家人团聚的美好时光

Dinner – time for families.

相比于早餐和午餐，晚餐是更温情的家庭时光，精细烹饪且食材种类丰富

Dinner is critical for families, with longer meal preparing time and more categories used.



晚餐更加丰富，推崇美味和健康

More opportunities in dinner assortment vitality can be an communication point

晚餐增长最快品类– 消费次数占比变化
Fast Growing Categories in Dinner – Occasion% Change

晚餐原因 – 消费次数占比变化
Fast Growing Reasons in Dinner – Occasion% Change

晚餐可为饮品带来更多的额外消费者。突出健康、配餐特性。

Dinner moments will bring more beverage opportunities if we can leverage health benefits and make sure beverage match the meal.

饮品渗透率 – 周度，重点城市+省会城市，基于个人消费者
Beverage Weekly Penetration, K+A, Individual

家庭消费带来11.2%额外的消费人群
In Home Consumption Build 11.2%
Incremental Penetration for beverage

43%

晚餐消费人数占比
Dinner User%

原因指数
Reason Index

健康
Healthy
197

配餐
Match With Meal
143

饮品包含即饮茶、果汁、碳酸、亚洲传统饮料、功能饮料
Beverage include RTD Tea, RTD Juice, CSD, Asian Traditional Drink, Functional Drink

以同一消费者为中心，360度还原他们的行为

Benefits for a Consumer Centric 360 View Study

01

同源数据，全方位了解消费者户内、户外消费场景。

Single source to measure what people buy and how they consume on specific occasion.

02

真实记录数据，联动购买和使用，对消费这行为了解更具体。

Real-time recording to diagnose consumer purchase and consumption to activate occasion based opportunities.

03

通过研究不同使用场景下的使用原因，优化消费者沟通策略

Understand reason for choices in specific occasions and to optimize communication strategy.

THANKS

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