CLIENT DAY 2019

DISRUPTING THE FUTURE

KANTAR WORLDPANEL

a CTR service in China

实现颠覆式增长的品牌战略解码

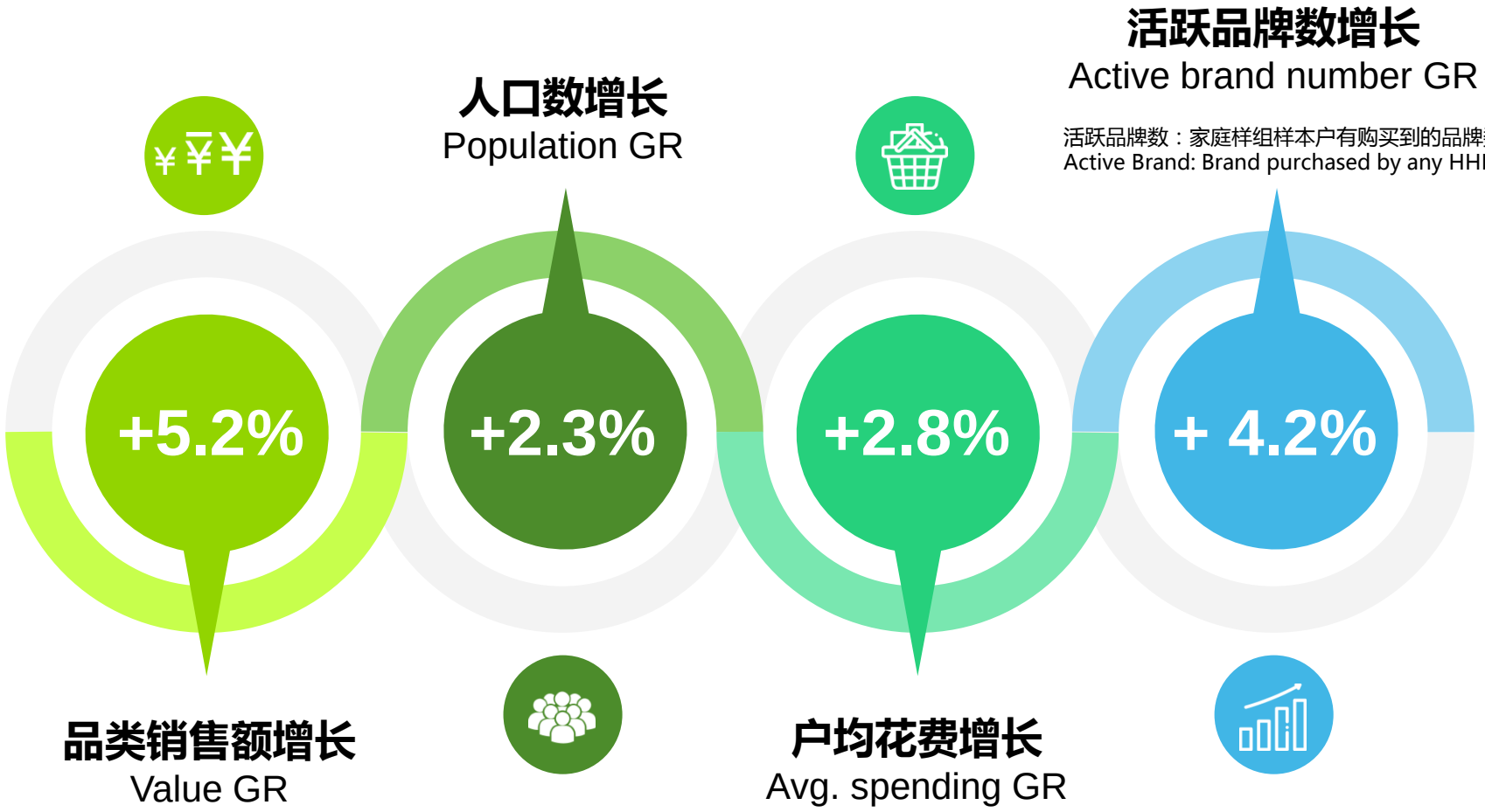
Decode disruptive brand growth

人口红利收缩，消费力停滞，零和游戏中竞争白热化

As population growth slowed down and shopper basket stagnant, competition gets more fierce in a zero-sum game

中国快消市场主要指标

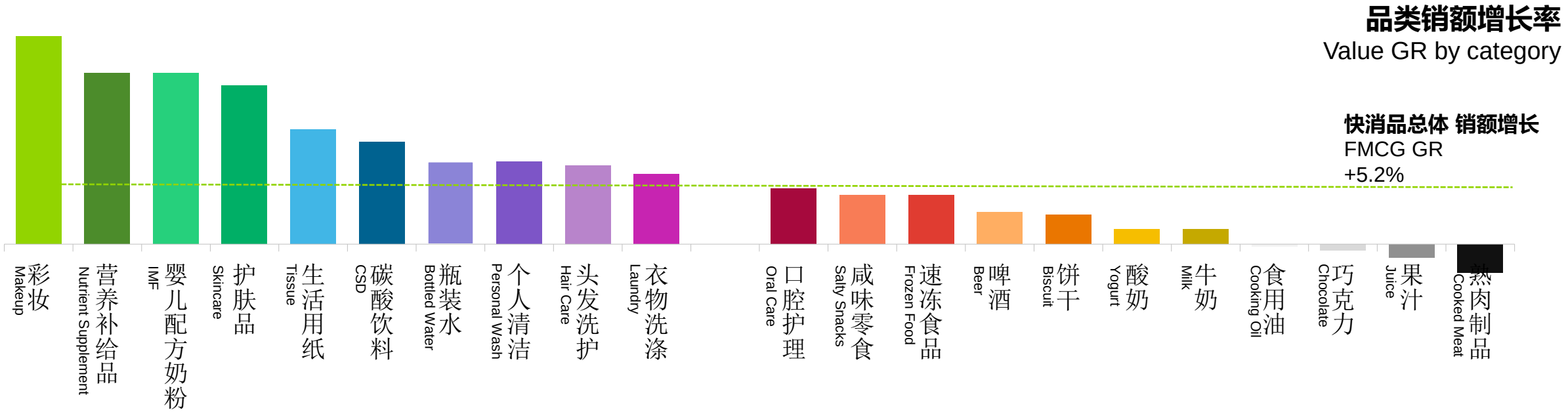
Key figures of FMCG category (2018 vs. 2017）



数据来源：凯度消费者指数家庭样组, 2018 vs. 2017
Data source: Kantar Worldpanel Household panel, 2018 vs. 2017

低迷市场仍现明星玩家: 高速品类不乏品牌爆发扩展，慢速品类也有品牌逆市上扬

Still there are brands ride on the growth of high speed categories or defy the trend in low-speed markets



快速品类中, **20%的品牌爆发扩展** (增速超品类2倍)
In high-speed markets, 20% of brands have 2 times of category growth

慢速品类中, **19%的品牌逆市上扬** (增速超快消市场2倍)
In low-speed markets, 19% of brands have 2 times of FMCG growth

增长明星品牌 Star brands

数据来源：凯度消费者指数家庭样组, 其中婴儿配方奶粉数据来自凯度消费者指数母婴样组（一、二线城市），护肤品/彩妆数据来自凯度消费者指数美妆样组，15-54岁女性消费者, 2018 vs. 2017
Data source: Kantar Worldpanel Household panel. IMF data is from baby panel（Tier 1-2 cities）, and skincare/makeup data is from beauty panel, 15-54 y.o. female, 2018 vs. 2017

增长明星

Examples of star brands to disrupt the market

老牌劲旅
Traditional leaders

上一年已有一定市场规模
observable market share year ago

颠覆新星
Disruptive players

上一年市场份额尚低
low market share year ago

老牌劲旅/增长明星品牌定义：1.高集中度品类（前十品牌份额在50%以上）中，上一年度份额<1%的增长明星为颠覆新星；反之为老牌劲旅 ； 2.低集中度品类（前十品牌份额在50%以下）中，上一年度份额<0.5%的增长明星为颠覆新星，反之为老牌劲旅. Definition of Traditional leaders/ Disruptive players: in categories where top 10 brands account for >50% of market , star brands with <1% share in 2017 are disruptive (star brands with >1% in 2017 as traditional leaders); and in categories where top 10 brands account for <50% of market ,star brands with <0.5% share in 2017 are disruptive (star brands with >0.5% in 2017 as traditional leaders).

数据来源：凯度消费者指数家庭样组, 其中婴儿配方奶粉数据来自凯度消费者指数母婴样组（一、二线城市），2018 vs. 2017。护肤品/彩妆数据来自凯度消费者指数美妆样组，15-54岁女性消费者, MAT19P3 vs. MAT18P3
Data source: Kantar Worldpanel Household panel. IMF data is from baby panel（Tier 1-2 cities）, 2018 vs. 2017. Skincare/makeup data is from beauty panel, 15-54 y.o. female, MAT19P3 vs. MAT18P3

像打造爱豆一样打造明星品牌

Creating a star brand like creating an idol

定位角色领域

Pick the right route to success

专攻粉丝喜好

Meeting needs of your fans

全域互动圈粉

All round interaction & conversions

瞄准细分，勇于拓展

Find meaningful segments and be ready to go beyond boundaries

开发机会领域：老牌劲旅多向发展，颠覆新星集中火力

Find high-potential segment：big brands look for multiple opportunities, but disruptors have to focus on a niche

护肤品类中

62% 的颠覆新星专注于一个产品细分*

VS老牌劲旅 27%

In Skin care,

62% of disruptive players focus on 1 segment

Vs. 27% in traditional leaders.

保健品类中

71% 的颠覆新星专注于一个产品细分*

VS老牌劲旅 20%

In Nutrient supplement,

71% of disruptive players focus on 1 segment

Vs. 20% in traditional leaders.

数据来源：保健品数据来自凯度消费者指数家庭样组，2018 vs. 2017; 护肤品数据来自凯度消费者指数美妆样组, 15-54岁女性消费者， MAT19P3 vs. MAT18P3

Data source: Nutrient Supplement Data is from Kantar Worldpanel Household panel, 2018 vs. 2017, and skincare data is from Kantar Worldpanel beauty panel, 15-54 y.o. female，MAT19P3 vs. MAT18P3.

*该产品细分占品牌销额50%以上，护肤共9个细分，保健品共24个细分

These brands has >50% of brand sales comes from one segment. There are 9 segments in skin care, and 24 segments in Nutrient Supplement.

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定义粉丝群，打造人设

Define key fans group,
deliver tailor-made solution and brand image

全域互动圈粉

All round interaction & conversions

品牌须圈定关键消费族群，从而打造深入人心的品牌和产品人设

Define key consumer group and design beloved brand and product features

花费更多
Heavy Spend

都市青年
户均花费指数:114

Tier 1-2 Young Single & Couples
Avg. Spend Index 114

宝贝一家
销额贡献指数 112

Young and Mixed Families
Value Contribution Index 112

潜力巨大
High Potential

小镇青年
人口增长指数 874

Tier 3-5 young aged 20-34 y.o.
Population incremental Index 874

银发一族
增长贡献指数 151

Old Single and Couples
Incremental contribution Index 151

数据来源：凯度消费者指数家庭样组, 其中人口增长指数来自凯度消费者指数美妆样组，2018 vs. 2017
Data source: Kantar Worldpanel Household panel. Population incremental index is from Beauty Panel, 2018 vs.2017.

户均花费指数= 该人群户均花费/小家庭（1-2人）户均花费 Avg. Spend Index= avg. spend of Tier 1-2 Young single &Couples/ avg. spend of small family (1-2 members)
销额贡献指数=该人群销额占比/该人群人口占比 Value Contribution Index= value share of this group/population share of this group
人口增长指数=该人群在15-54岁人口增量贡献占比/该人群人口占比 Population incremental Index= share in 15-54 y.o. population incremental /share in population
增长贡献指数=该人群销额增量占比/该人群人口占比 Incremental contribution Index= share value incremental/share in population

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线上线下，热搜不断

Efficiently utilize various platforms,
increase interactions to gain awareness

大小平台巧运用，线上助力颠覆增长

Take advantage of both mainstream and emerging platforms to achieve effective consumer reach

电商是增长的催化剂
EC as catalyst for growth

电商在增长明星品牌的销额占比是市场平均值的

1.5倍*

Star brands' EC value% is **1.5** times of in total FMCG.

*基于21个主要品类品牌计算。
Based on 21 major categories.

优选特色平台触达关键消费者
Identify key platform to reach key buyers

PERFECT DIARY BEAUTY ✖ 小红书

彩妆品类优势平台
Platform with expertise in Makeup

2017

全面布局小红书
Actively promote on Red

明星、KOL、素人全面种草
Celebrity, KOL and normal users recommendation

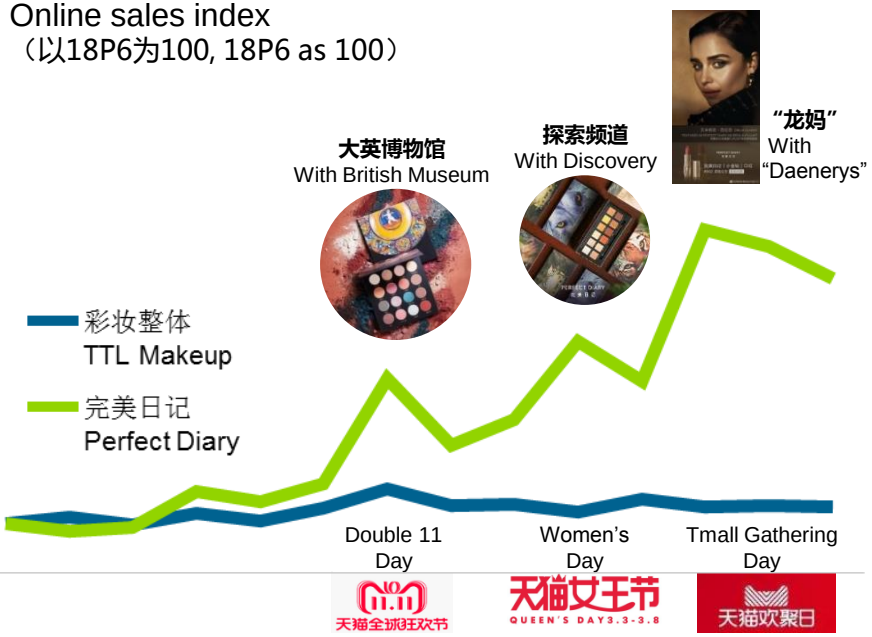
2019

小红书品牌账号137万粉丝
1.37 million followers on Red

小红书彩妆销量No.1 品牌
Best selling makeup brand in Red in volume

借力主流平台捕获流量
Ride on major E-retailers to win traffic

线上销额指数
Online sales index
（以18P6为100, 18P6 as 100）



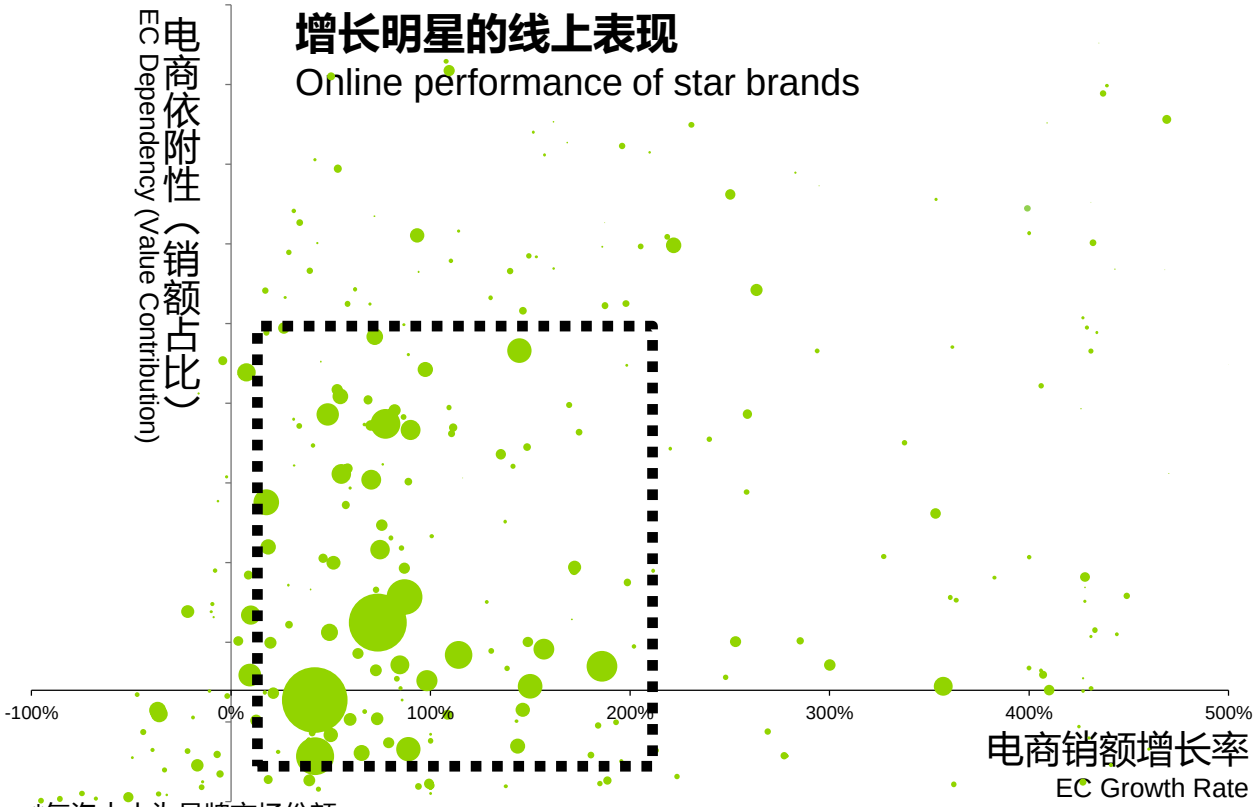
数据来源：凯度消费者指数家庭样组, 2018 vs. 2017, 其中彩妆数据来自凯度消费者指数美妆样组, 15-54 岁女性消费者，MAT19P3 vs. MAT18P3。
Data source: Kantar Worldpanel Household panel, 2018 vs. 2017. Makeup data is from beauty panel, 15-54 y.o. female, MAT19P3 vs. MAT18P3.

持续扩张须全渠道联动圈粉，线上线下齐发力

Sustainable expansion calls for Omni-channel deployment

增长明星的线上表现

Online performance of star brands



*气泡大小为品牌市场份额。
Bubble size represents brands' market share.

数据来源：11个品类，凯度消费者指数家庭样组, 2018 vs. 2017, 其中护肤品/彩妆数据来自凯度消费者指数美妆样组，15-54岁女性消费者，MAT19P3 vs. MAT18P3。
Data source: 11 categories, Kantar Worldpanel Household panel, 2018 vs. 2017. Skincare/makeup data is from beauty panel, 15-54 y.o. female，MAT19P3 vs. MAT18P3.

最大化消费者触及
Maximize Consumer Reach

三只松鼠品牌店/入驻合作渠道
93%线下坚果购买者上一年未曾在其网店购买
Three Squirrels offline stores
93% of offline nuts buyers didn't buy in its online store

优化购物体验
Enhance purchase experience

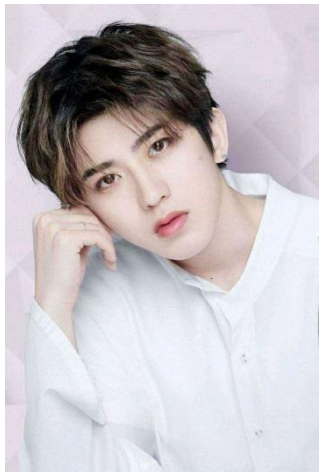
网上下单，到店即取
Online order
offline pickup

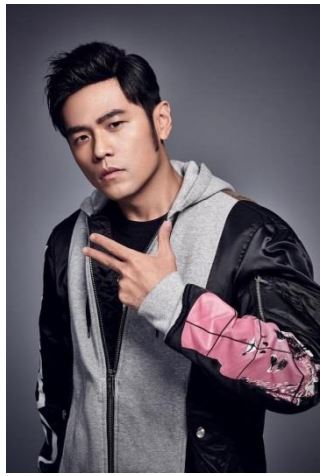
满足多场景需求
Meet needs in all occasions

冷链进化，冰淇淋直达
Supply chain innovation for
in-home ice cream delivery

实现颠覆式增长的品牌爱豆养成术

Decode disruptive brand growth





定位角色领域 Pick the right route to success

瞄准产品细分，向内以精专拓展，向外发掘相关扩张契机

Establish expertise in targeted one segment through creating innovative products and occasions, and seek cross-category opportunities for further expansion

专攻粉丝喜好 Meeting needs of your fans

深入研究目标消费群，深究其关注点，打造深入人心的产品和品牌

Define and investigate target consumer group, deliver differentiated products and tailor-made message to meet their needs

全域互动圈粉 All round interaction & conversion

优选平台直达目标粉丝，创意吸粉热搜不断，线上线下全域转化

Cooperate with right platform to reach target consumers effectively; drive continuous growth through creative omni-channel campaigns