CLIENT DAY 2019

DISRUPTING THE FUTURE

KANTAR WORLDPANEL

a CTR service in China

小业态大机会

Small is the new BIG

2019.07

由于中国消费者的生活习惯及方式不一样，小业态在中国乃大势所趋

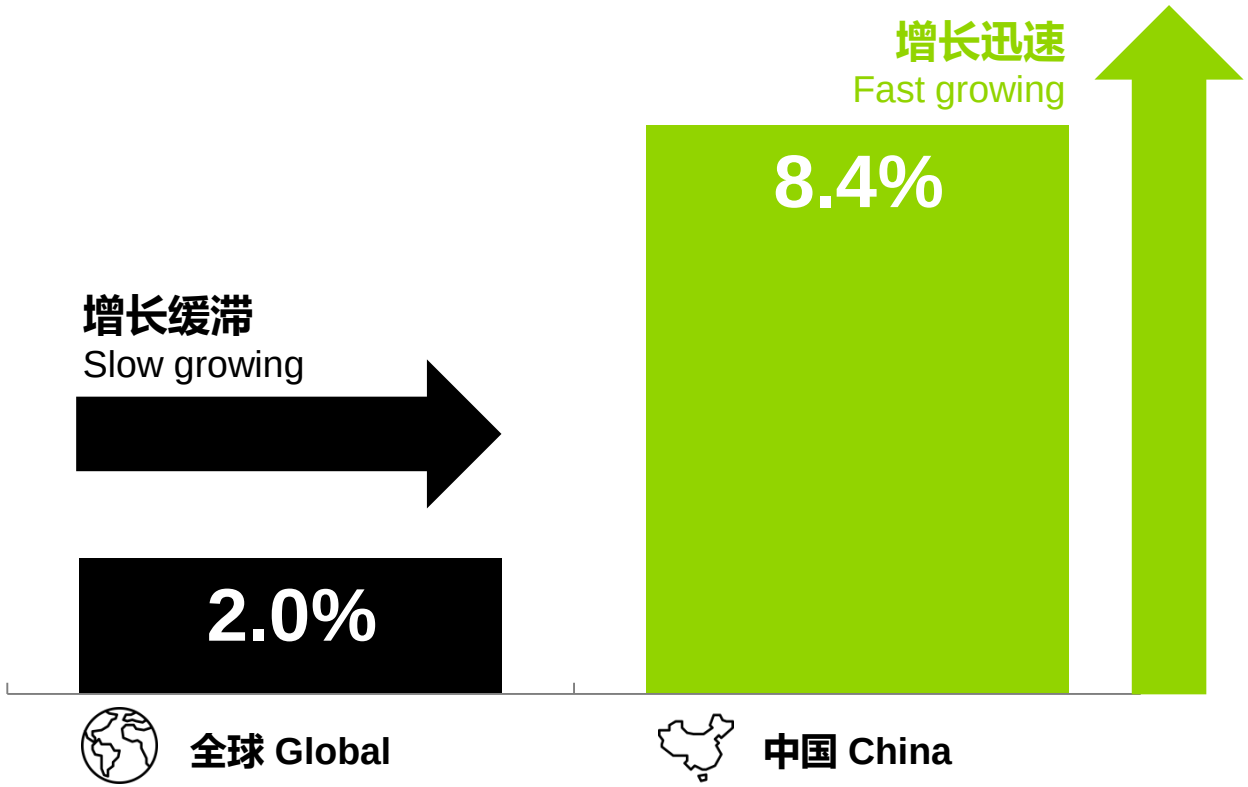
Small format stores are growing much faster in China than global average

小业态全球概览

Small format store Global view

小业态份额

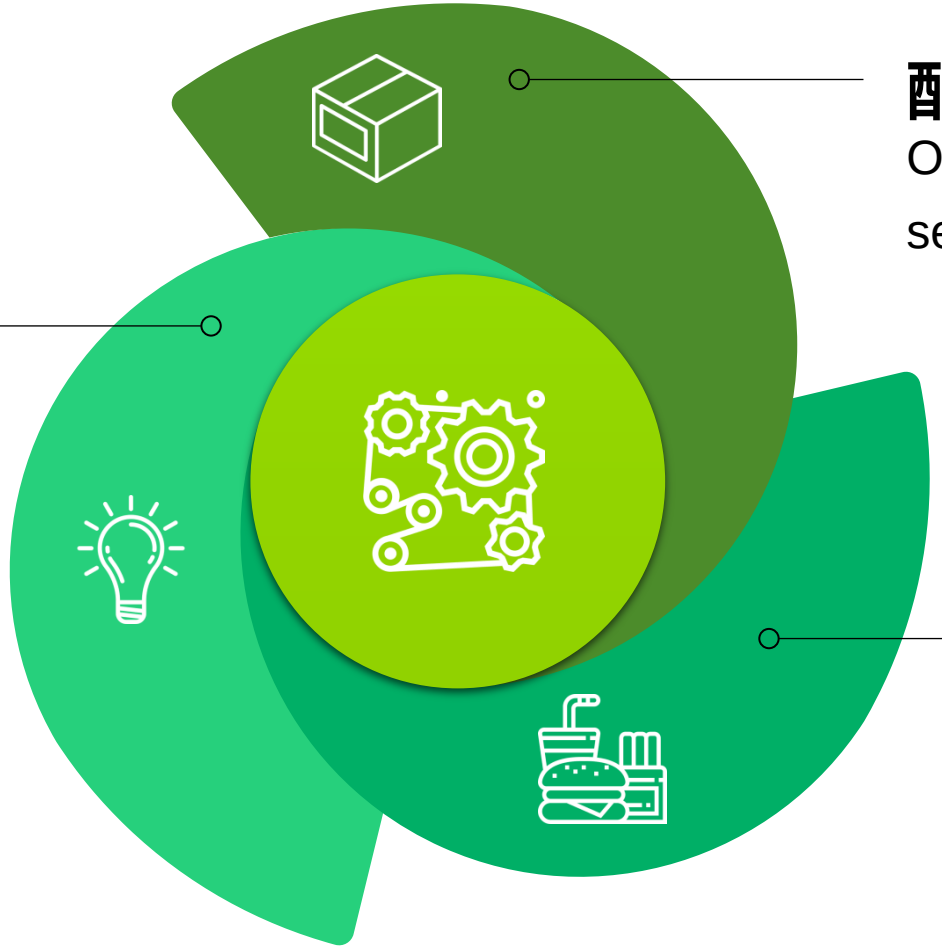
Small format value%



数据来源: 全球，凯度 | 2019致胜全渠道报告, 2018对比2017，小业态包括：便利店。中国，凯度消费者指数(中国) | 城市家庭样组，截至2019年5月17日的52周对比截至2018年5月18日的52周，小业态包括：小超市 / 便利店(连锁). Data source: Global, Kantar | 2019 Winning Omni-channel report, 2018 vs. 2017. Small format store including: Convenience store. China, Kantar Worldpanel (China) | HHP, MAT19P05 vs MAT18P05. Small format store including: Small super / Convenience store (chained)

新零售时代助力小业态腾飞的三大引擎

Three engines in the ‘new retail’ era to empower the new big growth of small format stores



配送服务
O2O delivery service

新业态
New format

即时性需求
Always on consumption needs

更多新零售小业态和模式创新，迎合越来越精细化的消费者需求

Different versions of new formats and business models, meeting increasingly sophisticated consumer needs

在过去…

In the past…

小超市 Small supermarket

便利店 Convenience store

现在, 各种新零售小业态兴起

Now, new retail small format is blooming

生鲜店*
Fresh food store

+43.6%

盒马菜市

Fresh 乐家生鲜 精品生鲜连锁超市

钱大妈 不卖隔夜肉

鲜丰水果

扩大生鲜区域的社区超市
Neighborhood store with more areas for fresh food products

永辉生活 健康每一天

suning 苏宁小店

永辉超市 mini 家门口的永辉 新鲜的永辉

天猫小店及京东便利店千店千面及品牌全渠道营销

Tmall Xiaodian/JD CVS. Customized offer & Omni-marketing activation

天猫小店

JD 京东便利店

盒马 Pick’n Go, 现制食品+便利店 “预约提取”

Hema Pick’n Go On premises food + CVS

数据来源: 凯度消费者指数 | 生鲜样组 MAT19P04
Data source: Kantar Worldpanel | Fresh food panel MAT19P04

小业态更能满足消费者的随时随地的购物需求

Small format store also caters the always-on consumption need

小超市
Small Super

+9%

MAT19P05
增长率 Growth Rate

路上需求
On the go

休闲一刻
Tea time

快餐
Quick Meal

紧急需求
Urgent needs

便利店
Convenience store

+23%

MAT19P05
增长率 Growth Rate

数据来源: 凯度消费者指数 | 截至2019年5月17日的52周。小超市, 城市家庭样组(重点城市/省级市/地级市/县级市/县)。便利店，户外消费样组(重点城市/省级市)
Data source: Kantar Worldpanel | MAT19P05. Small super, HHP(Key/A/B/C/D cities). Convenience store, OOH (Key/A cities)

配送服务加持小业态的进一步发展

Delivery service further drives small format store's growth

59%

小业态顾客使用过配送服务

Small format store shoppers ever used delivery service

即使SKU数有限，小业态产品仍能覆盖消费者日常所需

Product cover day to day needs even with limited numbers of SKU

现在许多本土小店也提供配送服务

Many local small stores offer delivery service

小型门店密度高，容易满足最后一公里的配送服务

Higher density, advantage to fulfill the last mile delivery.

数据来源: 凯度消费者指数 | 2019年7月 iCTR 网络调研 N=2228 (重点城市/省级市/地级市)。调研中，小业态涵盖：小超市 / 便利店 / 生鲜店

Data source: Kantar Worldpanel | Jul 2019 iCTR Online Survey N=2228 (Key/A/B cities). In the survey, small format includes small super / CVS / fresh food store

6大杠杆致胜小业态

6 levers for brands to win in small format stores

定制化区域策略
Regionalized strategy

零售商与品牌互利共赢
Win-win brand building

合理布局产品
Right Portfolio

线上线下充分融合
Leverage O2O platforms

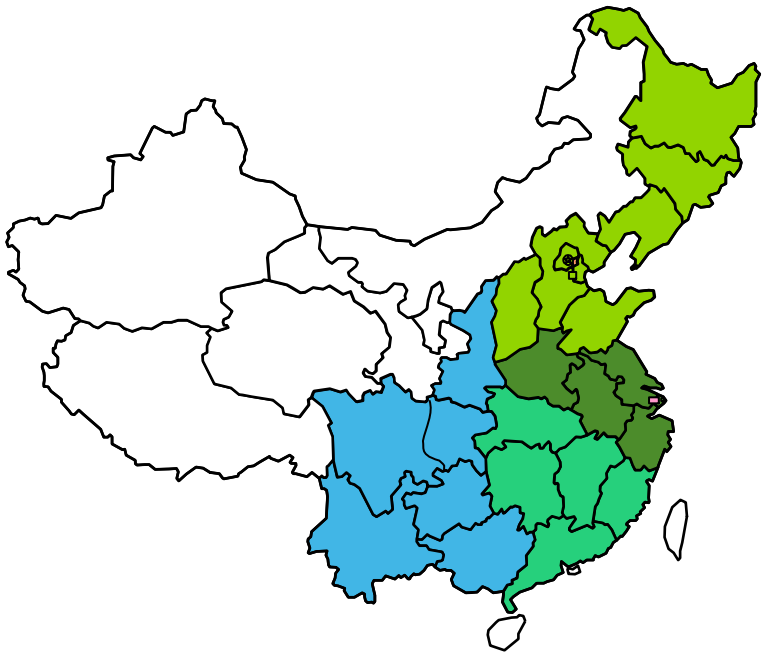
精明促销
Smart promotion

量身定制产品创新
Innovation for small stores

致胜小业态必须因地制宜

Regionalized strategy is a must to win in small format stores

排名领先的小业态零售商
Top small format stores



	全国性 National	东部 East	南部 South	西部 West	北部 North
小超市 Small Super	Vanguard 华润万家 永辉超市 YONGHUI SUPERSTORES	联华超市 LIANHUA SUPERMARKET 华润苏果 CHINA RESOURCES SUGUO	中百超市 ZHONGBAI SUPERMARKET 旺中旺	利家隆 LINKLONG 红旗连锁	京客隆 物美 WU MART
便利店 CVS	7-ELEVEN VnGO FamilyMart	好的 Howdy 好德 alldays 可的 KEDI	美宜佳 MEIYIJIA 芙蓉兴盛 FURONG XINGSHENG OK便利店	红旗连锁 可购 24H便利店 wowo	物美便利店 WU-MEI CONVENIENCE STORE 维客集团 WEEKLY GROUP 百文便利

数据来源: 凯度消费者指数 | 城市家庭样组(小超市)，户外消费样组(便利店)，截至2019年5月17日的52周
Data source: Kantar Worldpanel | HHP(Small Super), OOH(CVS), MAT19P05

小业态货架空间有限，合适的产品组合迎合消费者需求尤为重要

With limited shelf space, different product assortment is essential to meet consumers needs

前三单品的销售贡献
Top 3 SKUs Value Contribution

前五单品的销售贡献
Top 5 SKUs Value Contribution

	前三单品的销售贡献		前五单品的销售贡献	
家用 / 大包装 Home / Bigger pack		32%	18%	罐装 / 分享装 Can / Bigger bag
家用 / 小包装 Home + convenient		34%	24%	罐装 / 小袋装 Can / Smaller bag
便携 / 小包装 Convenient pack		43%	28%	小袋装/罐装 Smaller bag /Can

数据来源: 凯度消费者指数 | 城市家庭样组，截至2019年5月17日的52周。排名依据SKU在每个渠道在该品牌中的销售额占比
Data source: Kantar Worldpanel | HHP, MAT19P05. Ranking is base on value share in the brand in each channel

通过更直接的促销促进关联购买

Drive bigger basket through more direct promotion and selling at cashier

您知道吗…
Do you know…
在有软饮料的购物篮子里
Among basket with beverage

在目的性极强的小业态购买中，通过强关联促销，激发增长潜能
Strong destination shopping mission in small format,
leverage hard promotion can activate co-purchase

在便利店，仅6%同时购买休闲食品
而这一比例在大卖场高达33%
In CVS, **6%** of them also has snacking products.
While this number is **33%** in hypermarket

连锁便利店
Chained CVS

强关联促销：
结账时，店员推荐加钱换购

Hard promotion:
Shop assistant recommends co-purchase in check out counter.

数据来源: 凯度消费者指数 | 户外消费样组(便利店)，城市家庭样组(大卖场) 截至2019年5月17日的52周. 休闲食品包括：饼干，口香糖/薄荷糖/喉糖，巧克力，糖果
Data source: Kantar Worldpanel | OOH(CVS) HHP(Hypermarket), MAT19P05. Snacking product including: Biscuit, Gum/Mint/Throat drop, Chocolate, Candy

购买决策时间更短，产品创新迎合小业态购物场景

As consumers spend less time browsing the shelf, shelf display & package design will have to be eye catching

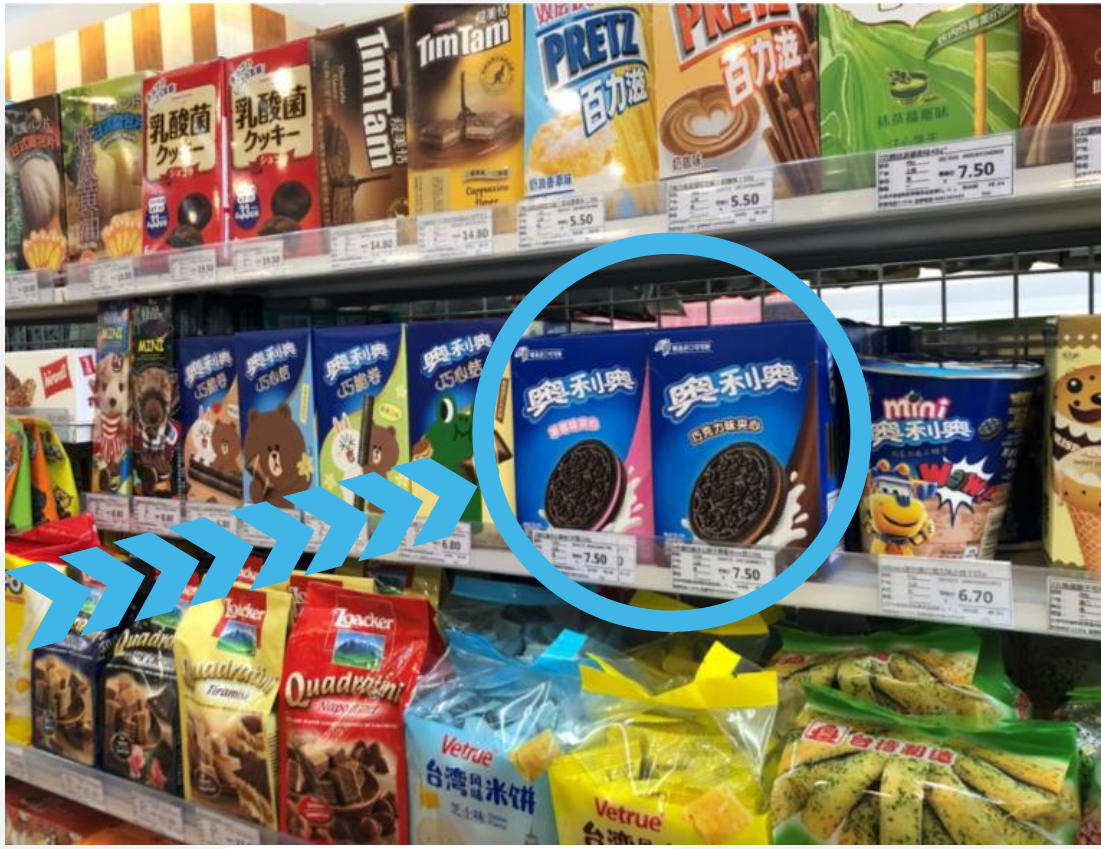
116g 市场份额增加:
116g Value% +/-:

+1.1pt

能在更短的购买决策时间内吸引消费者注意力
Eye-catching, suitable for quick decision purchase environment

116g **苗条装**
116g Slim package

116g **矮胖装**
116g Fat package



数据来源: 凯度消费者指数 | 城市家庭样组+户外消费样组，重点城市，便利店，截至2019年5月17日的52周 对比截至2018年5月18日的52周
Data source: Kantar Worldpanel | HHP+OOH, Key cities, CVS, MAT19P05 vs. MAT18P05

线上线下充分融合，营造全渠道消费场景，扩大品牌影响力

Leverage O2O delivery capabilities to expand into new territories and create omni-channel opportunities

苏宁易购 suning.com

苏宁小店

布局前置仓
苏宁小店还在618大促中帮助大家实现了“小龙虾自由” 并带动关联产品啤酒销量提升

Frontline warehouse
Suning fulfil consumers desire to sell crawfish in recent 618 shopping festival and boost beer, sales

打通APP和门店流量
优惠券互通
Enable OAO traffic
Coupon for both APP and offline store

前置仓+实体店+APP 模式 Micro warehouse + Store + APP

借力热门活动，线上线下联动联动营销
Leverage hot event, Omni-marketing

小业态与品牌紧密合作，创造多种玩法，提供给消费者与众不同的体验

Co-brand campaign to create win-win for both and bring unique shopper experiences

苏宁小店-康师傅"大牌霸城"活动/2018.10

Sunning CVS X KSF In-store Activity in 6 cities, 2018 October

罗森-可口可乐主题店/2019.07

Lawson X Coca Cola Theme Store，2019 July

品牌商何把握小业态的大机会

Implications to brands to capitalize the big opportunities for small format stores

定制化区域策略
Regionalized strategy

了解区域零售商及消费者差异性，设定定制化方案
Understand regional differences of shoppers and retail customers and create tailored strategies

合理布局产品
Right Portfolio

小包装，稍高定价，根据购物场景配置合适的产品
Use the right package and price mix to deliver sales based on specific shopping missions

精明促销
Smart promotion

浅促销，激活关联购买，高流量产品带高利润产品
Lighter and smarter promotions to drive bigger basket, together with the flow of high margin items

量身定制产品创新
Innovation for small stores

产品创新要适应更短的购买决策时间
Consider product innovation for small format stores specifically to tailor to the fast nature of shopping decisions

线上线下充分融合
Leverage O2O platforms

借力O2O，营造全渠道消费场景，扩大品牌影响力
Leverage O2O, capabilities to appeal to broader consumer needs and expand brand buzz

零售商与品牌互利共赢
Win-win brand building

与小业态零售商紧密合作，创造多种玩法，提供给消费者与众不同的体验
Create co-branding opportunities to deliver exceptional shopping experience

THANKS

KANTAR WORLDPANEL

a CTR service in China