新时代“心”方向

How to innovate in the New Era?

凯度消费者指数/Kantar Worldpanel

李嵘/Rachel Lee

凯度集团--全球最大的广告传播集团WPP的重要业务分支

Kantar–An important branch of the world's largest advertising and communications group WPP.

广告媒体投资管理
Advertising Media Investment Management

医疗保健
Health Care

公共关系&公共事务
Public Relations & Public Affairs

数字营销
Digital Marketing

品牌塑造和视觉识别
Branding&Visual identity

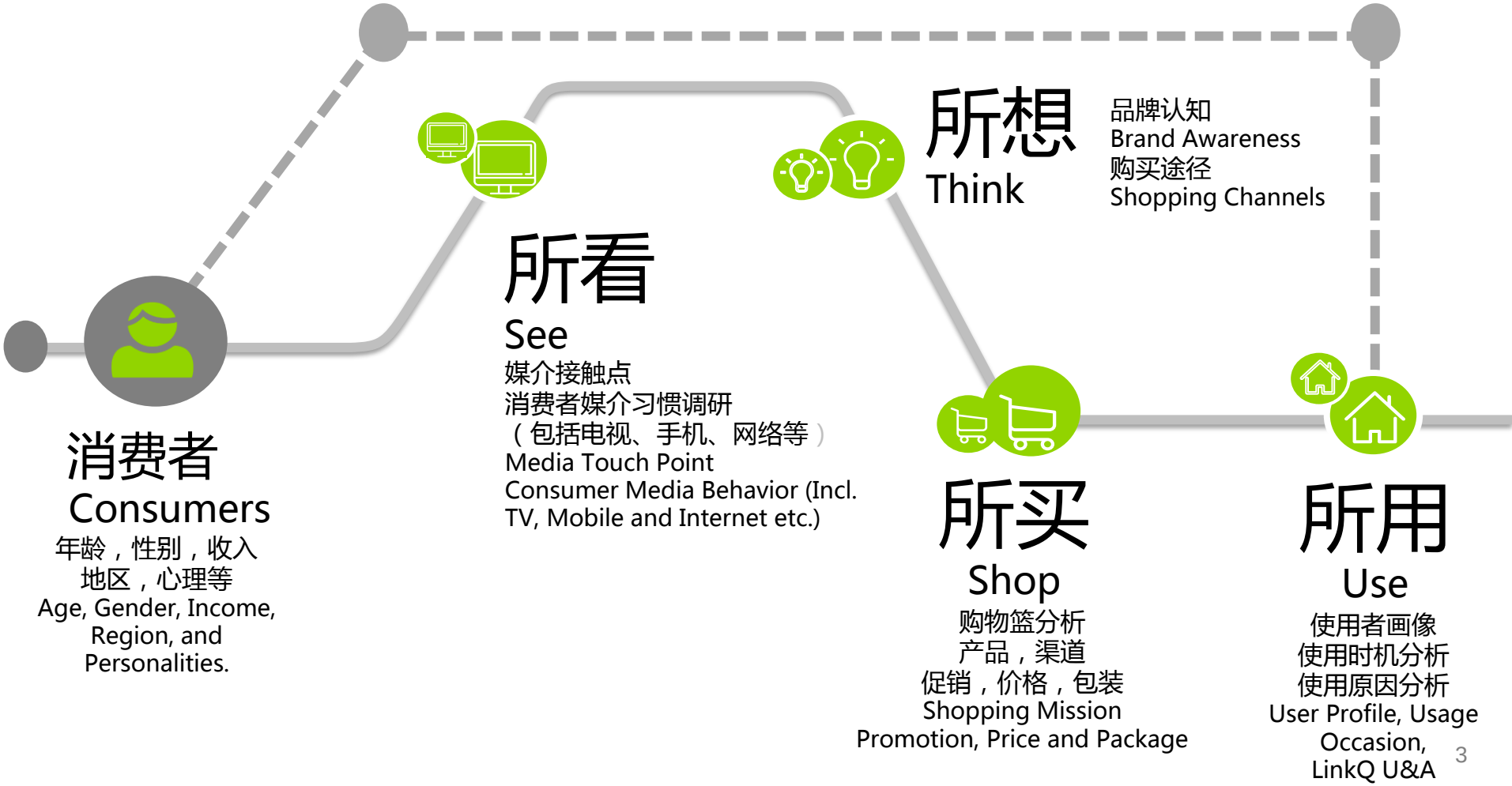
WPP

KANTAR

数据、洞察及咨询
World’s Leading RESEARCH, DATA and INSIGHT BRANDS consulting.

凯度消费者指数：以消费者为核心，记录完整消费路径中的各个环节

Kantar Worldpanel–Our consumer panels monitor shopper and usage patterns on a continuous basis through their whole shopping trips.



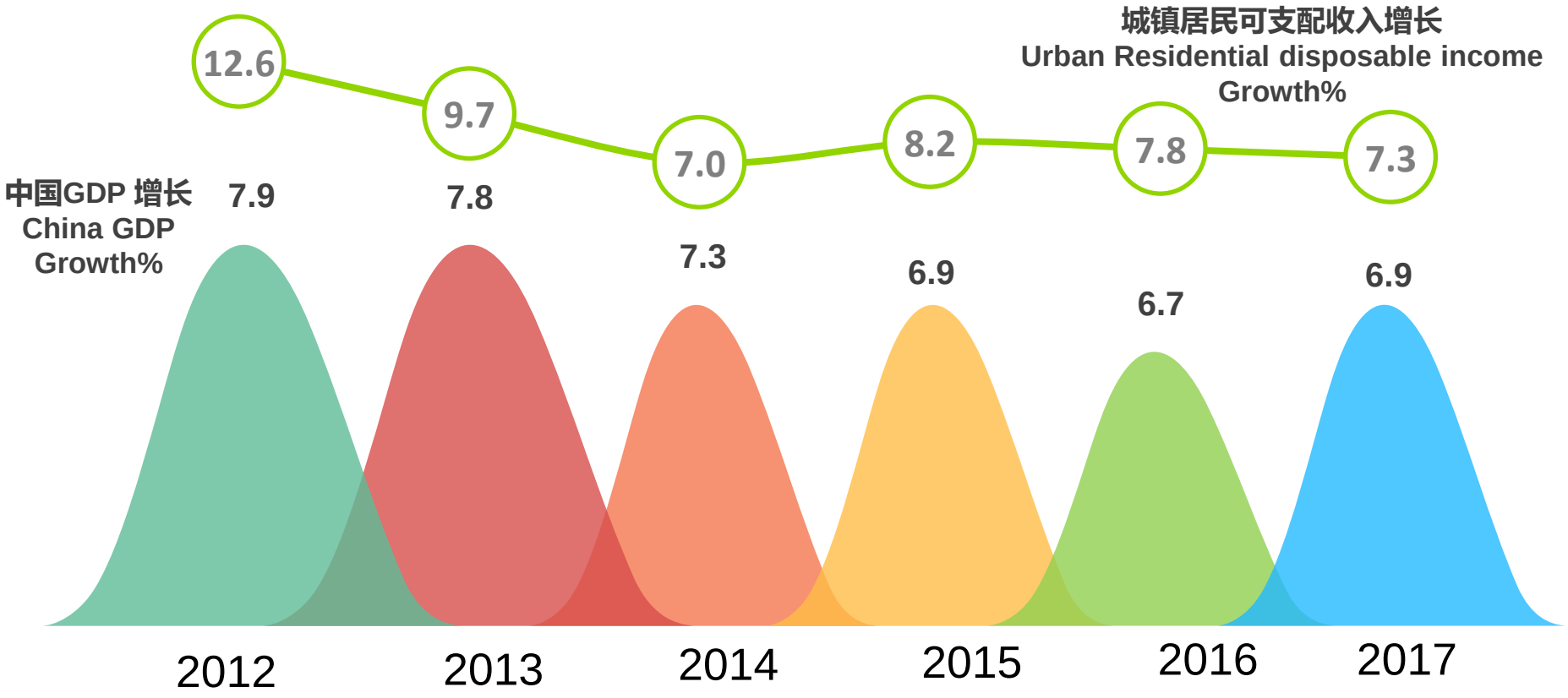
包装食品饮料市场趋势

Food & Beverage market overview

KANTAR WORLDPANEL a CTR service in China

2017年中国GDP在连续下滑五年后首次回暖，人均可支配收入仍旧保持增长态势

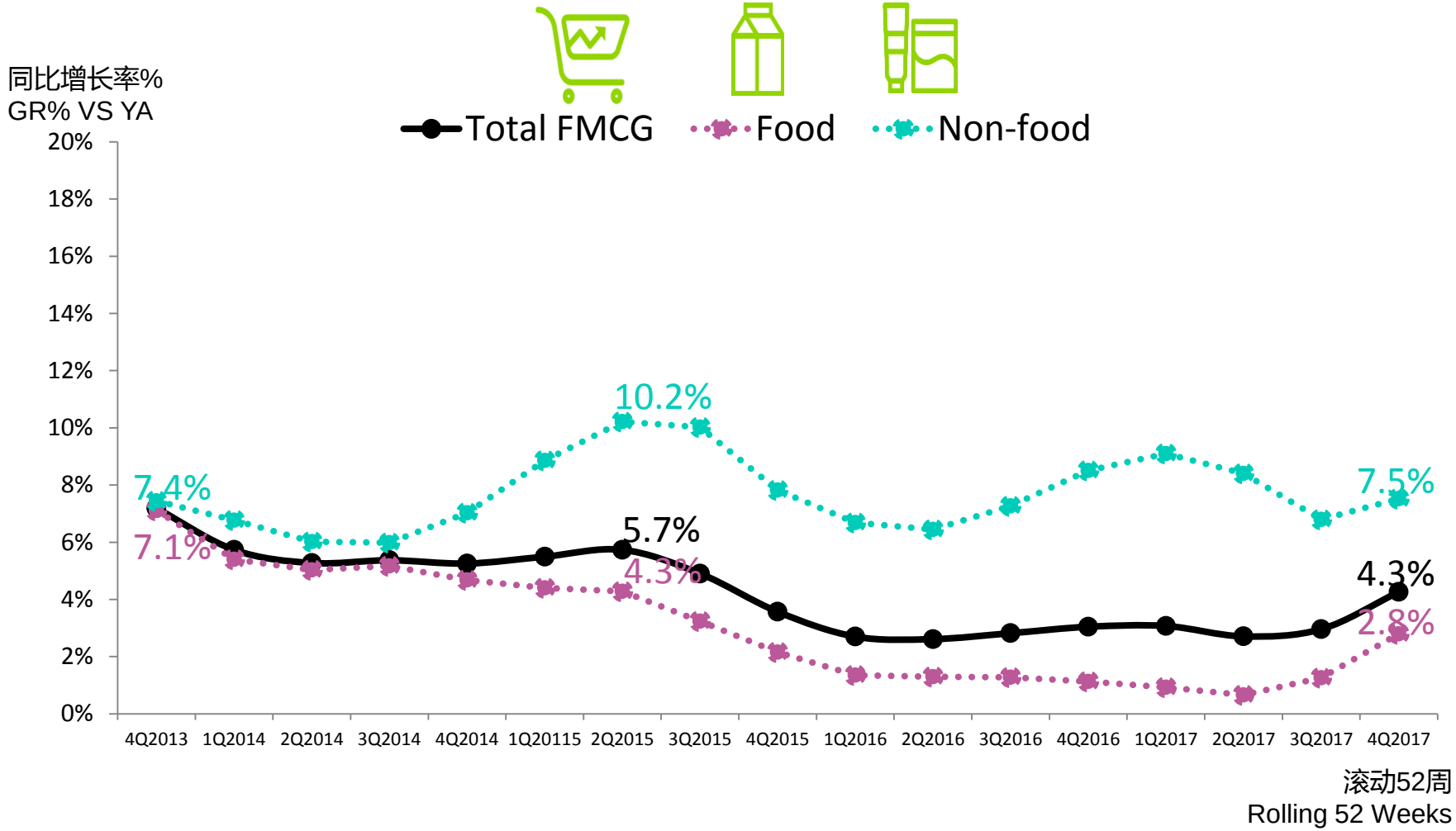
2017 GDP in China rebounds for the first time since 5 years ago, while disposable income kept the same growth momentum.



数据来源： 国家统计局
Data Source: National Statistic Bureau

自2017年第三季度快消品整体市场回暖，增速4.3%

FMCG growth has been coming back since 2017Q3, and reached to 4.3% growth till end of 2017.



数据来源： 凯度消费者指数，截止2017全年对比
Data: Kantar Worldpanel, 52 w/e Dec. 2017

* Excl. cigarette category since 2017Q2

2017年中国包装食品饮料消费市场仍旧乘高端化趋势，而购物篮却越来越精简

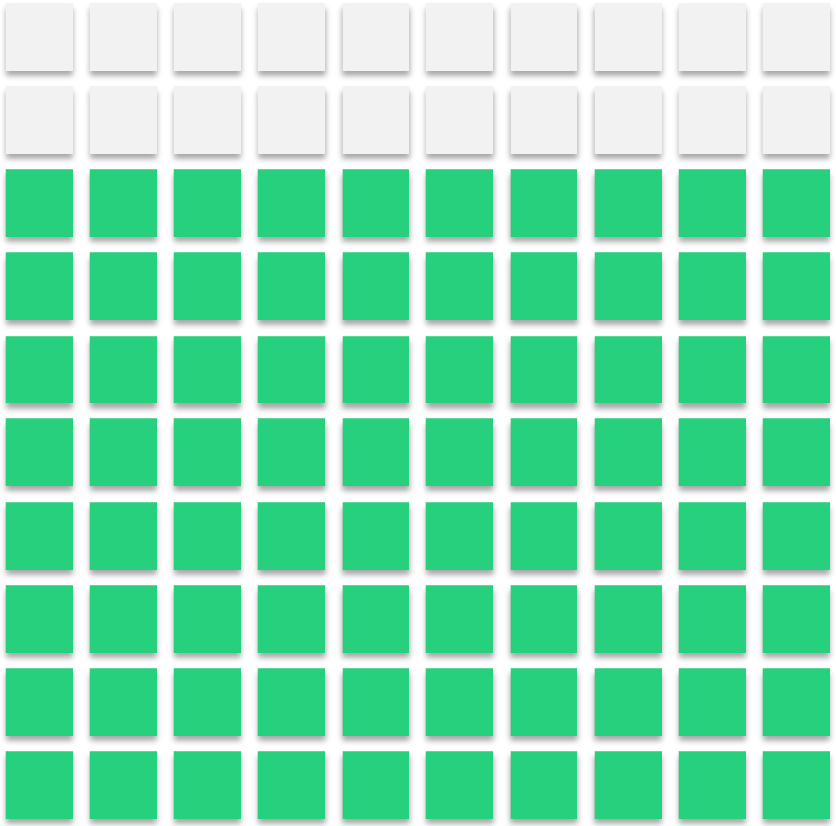
2017Food & Beverage in China continues showing a trend of premiumisation, while baskets size are getting smaller with less number of baskets.

销售低速增长	持续高端化	单次购买量停滞	购买频次减少	城镇化加剧
+3%	+3%	-1%	-3%	+3%
Value Sales Slows	Continuous Premiumisation	Smaller Trip Spending	Reduced Shopping Frequency	Continuous Urbanization

数据来源： 凯度消费者指数，截止2017全年对比
Data: Kantar Worldpanel, 52 w/e Dec. 2017

品牌在创新研究和新品发展上投入巨额资金

Billions of dollars are poured into innovation research and development every year



80% 的世界五百强品牌在过去一年中都推出了新产品

of the 500 top performing brands globally had new launches in past 1 year

1.4% 单品能在上市一年后达到0.1%的渗透率

Only 1.4% new launches(SKU) managed to reach a penetration of 0.1% in a year.

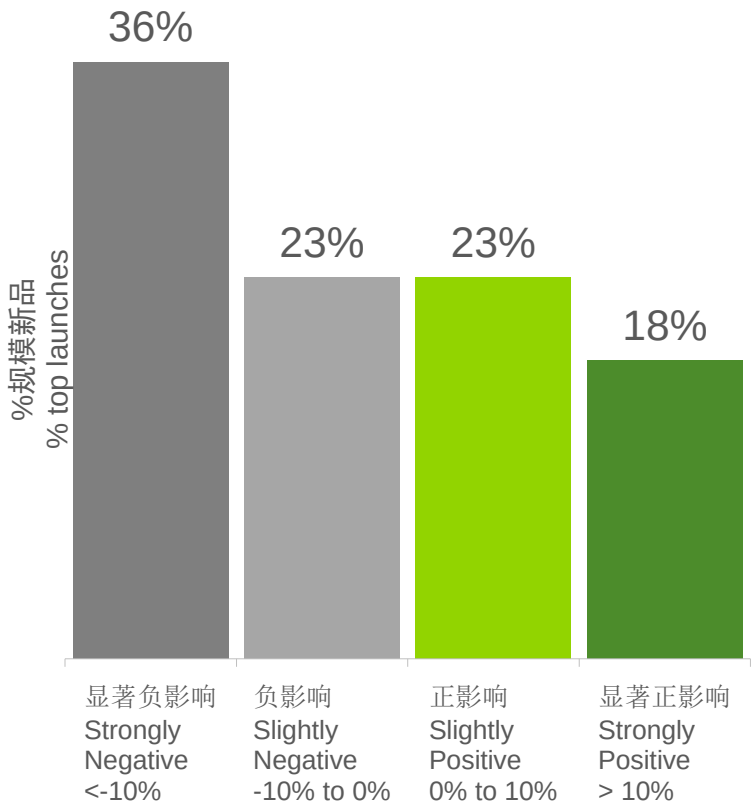
数据来源；凯度消费者指数过去三年新品研究

Data: Kantar Worldpanel China New Launches in Latest 3 Years

但是只有18%的新品上市能为品类带来显著的正面提升

However, only 18% launches have significantly positive effect on category sales

品类增量大小占比
Size of category impact



能够为品类带来价值的新品才能在长期为品牌获益 – 这同时也是零售商的核心关注点

Growing the value of the category as a whole is more beneficial over the long term- and is top priority for retailers

Data source: Kantar Worldpanel China New Launches in Latest 3 Years

创新之道

食品饮料品牌主需通过“三新”谋求适合时代发展的出路

3 News to lead growth for food & beverage.

- 了解消费者**新生活方式**

  Understanding New Lifestyle

- 组织要适应**新格局**

  Adapting in New Retail

- 找到适合的**新平台**

  Find the new right platform

新生活-- 这个世界变了，它变得更大也小，同时更健康

This world is new- it has become bigger yet smaller, meanwhile healthier.

四年之间，中国人的人均开销花费在通讯，教育/娱乐，药品上更多；而快消品花费所占比例更少

From 2013 to 2017, Chinese per capita spending on communication, education, recreation and medical increased, less on FMCG.

2017年对比2013年中国人均开销支出占比%

2017 vs 2013 Per Capita Spending %

	快消品 FMCG	衣物 Clothing	住宿 Housing	办公用品/服务 Staple/Services
Y2013	31.2%	7.8%	22.7%	6.1%
Y2017	29.2% ▼	6.8% ▼	22.1% ▼	6.2% ▶

	通讯 Communication	教育/娱乐 Education/Recreation	药品 Medical
Y2013	12.3%	10.6%	6.9%
Y2017	13.6% ▲	11.2% ▲	8.3% ▲

数据来源： 国家统计局
Data: National Bureau of Statistics of China.

▲ 对比2013年上涨超过0.5ppt
▼ 对比2013年下降超过0.5ppt

我们的生活方式也发生了改变– 生活场景更大更多样

Our lifestyle is changing– our living scenes have changed bigger and more diversified.

2017年中国电影收入：
559亿人民币，同比+13.5%

“黄牛”贩售价格：
50-60人民币/杯

Starbucks星巴克
+1 家店 / 15 小时Hrs

Penetration in Key & A Cities

数据来源；国家新闻出版广电总局; 凯度消费者指数家庭样组，2017年12月
Data Source: The State Administration of Radio Film and Television(SARFT); Kantar Worldpanel, 52 w/e Dec. 2017

我们的生活方式也发生了改变–地球变得更小了，外出旅游的增多让消费者有更多机会触及更多商品

新生活

Our lifestyle is changing- The world is becoming smaller- Travelling abroad has increased the chance for oversea products to distributed further and deeper in china.

出境

131百万次
131 Mil Times

+7%

2017年人次
Travel Times

同比16年增长率%
Travel Times GR% vs YA

国内游

50亿次
50 BN Times

+13%

整体零食增长率：
Total Snack GR% 2017 Dec vs YA:

0%

进口零食增长率：
Total Snack GR% 2017 Dec vs YA:

+6%

*零食: 糖果，膨化零食，饼干，布丁，蛋糕
*Snack: Confectionary, Puffed Snack, Biscuit, Pudding, Soft Cake.

数据来源；中国旅游局2018年公布2017年数据；凯度消费者指数家庭样组，2017年12月
Data Source: National Tourism Board; Kantar Worldpanel, 52 w/e Dec. 2017

我们的生活方式也发生了改变–人们变得更健康了

Our lifestyle is changing- People are becoming healthier.

50%

Penetration% of taking exercises at least once a week
每周至少运动一次人数比例

销售额增长率% 2017年vs.2016年
Value Growth Rate%, 2017 vs 2016

+42%

豆奶
Soybean Milk

+18%

固体营养粉
Nutrient Solid Drink

+10%

乳酪
Cheese

+9%

包装水
Package Water

+8%

酸奶
Yogurt

数据来源；凯度消费者指数家庭样组，2017年vs.2016年
Data: Kantar Worldpanel, 52 w/e Dec. 2017 vs YA

新格局-- 人人都说新零售

Win in New Retail.

新格局

随着16年底国务院出台零售转型文件，过去两年新零售相关新闻层出不穷，零售开启新纪元

New Retails' have stream of news since end of 2016 when Governmental documents have been released to support new retail.

2017.7.5 阿里巴巴推出"天猫精灵" Tmall Genie was introduced

2017.8.9 淘宝便利店上线 Taobao convenient store launched

2017.12.盒马鲜生 截止目前9个城市35家
Hemaxiansheng has 35 stores in 9 cities.

2017.11.20 阿里入股高鑫零售 持股36% Alibaba invested in Sun Art group and hold its share around 36%.

2017.1.1 永辉 超级物种 在福州开业 YH's first Super Species Store opened in Fuzhou

2018.2 步步高 智能零售与京东腾讯合作 Better Life announced to corporate with JD and Tencent.

新零售的核心是运用数据和技术，对于人货场的重构

The core of new retail is the use of data and technology to reconstruct linkage among consumers, products and channels.

消费场景
Shopping Field

Product
产品

Consumers
消费者

零食市场面临新零售的挑战同时也存在机遇；通过调整格局变化来适应“人、货、场”结合的新零售时代

Organization is facing challenges and opportunities at the same time; adjusting organization structure properly could help to identify growth engine in the new retail era.

人

创造天猫品牌日：2017年5月6日

Create Tmall Brand Festival

线上可个性化定制涂鸦包装奥利奥

Can design and order personalized painting package.

方便

多样化

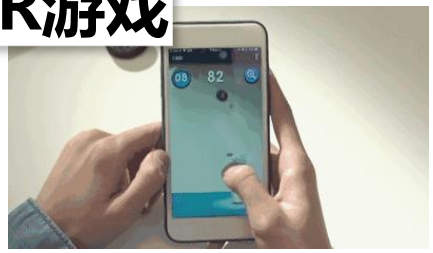
货

通过技术与体验的加持，重新品牌发力

Rejuvenate brand through technology and consumer personal experience

音乐盒

AR游戏



场

结合电商技术线上线下齐发力

Online*Offline multi platforms campaign activity to help deliver brand image.

天猫品牌日
线上线下联动

数据来源；亿滋奥利奥官方微信及天猫店铺

Data: Mondelez Oreo Official Wechat & Tmall Shop webpage.

乐纯酸奶成功运用人货场相结合，在2017年成功的将市场体量扩大了4倍

Lepur successfully reconstruct linkage among consumers, products and channels, which has made its market size 4 times bigger in 2017 vs 2016.

销售额2017年上涨+464%

GR% VS 2016

人

高端化产品：乐纯酸奶每盒平均25元人民币，每KG单价是酸奶均价的9倍

Premium Products: Lepur Yogurt per box 25 RMB, 9 times higher than yogurt avg price/kg

高端化

口碑爆款

货

通过技术与体验的加持，进一步推广品牌

Further advertise/distribute brand through technology.

德国进口技术

它是国内真正的滤乳清酸奶

85年滤乳清酸奶德国老牌工艺GEA Westfalia提供技术顾问和设备支持。

覆盖全国冷链

126个城市全程冷链配送

携手顺丰、京东冷运，2-6摄氏度，全程冷链送达126个国内城市。

场

结合电商技术线上线下齐发力

Online*Offline multi platforms campaign activity to help deliver brand image.

线上带动品牌
线下精选渠道

它是星级酒店行政主厨的共同选择。

随后进入绿叶子Citysuper等高端精品超市和全家罗森等便利店。

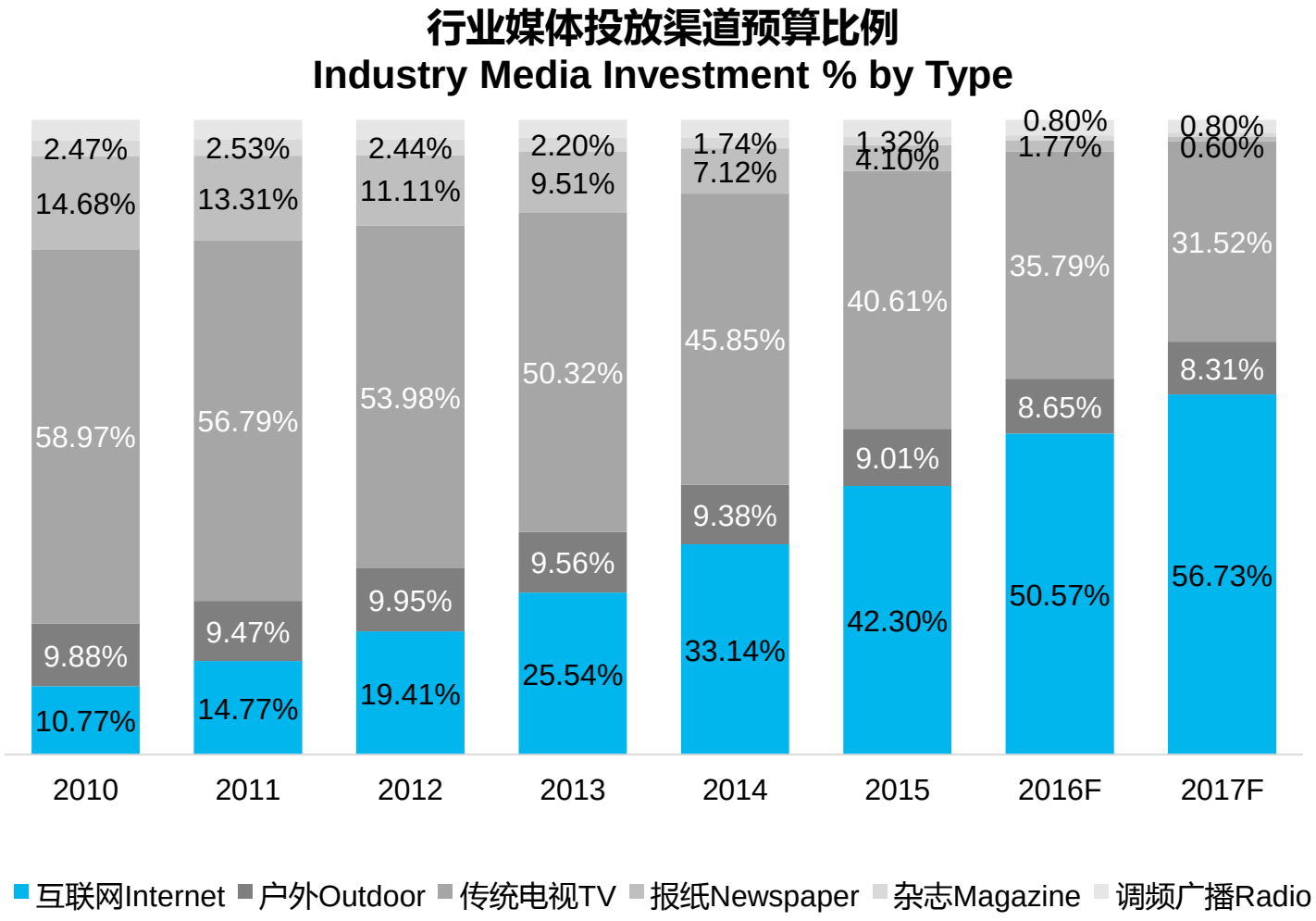
数据来源；乐纯官方旗舰店，凤凰资讯《乐纯：靠全渠道运营稳步发展，获“2017最具成长性消费品牌”》；凯度消费者指数。
Data:http://www.lechun.cc/； http://news.ifeng.com/a/20170912/51963732_0.shtml . Kantar Worldpanel, 52 w/e Dec 2017

新平台-- 搭好数字化快车队

How to win in the fast changing digital world?

互联网已经是主流的媒介投放渠道

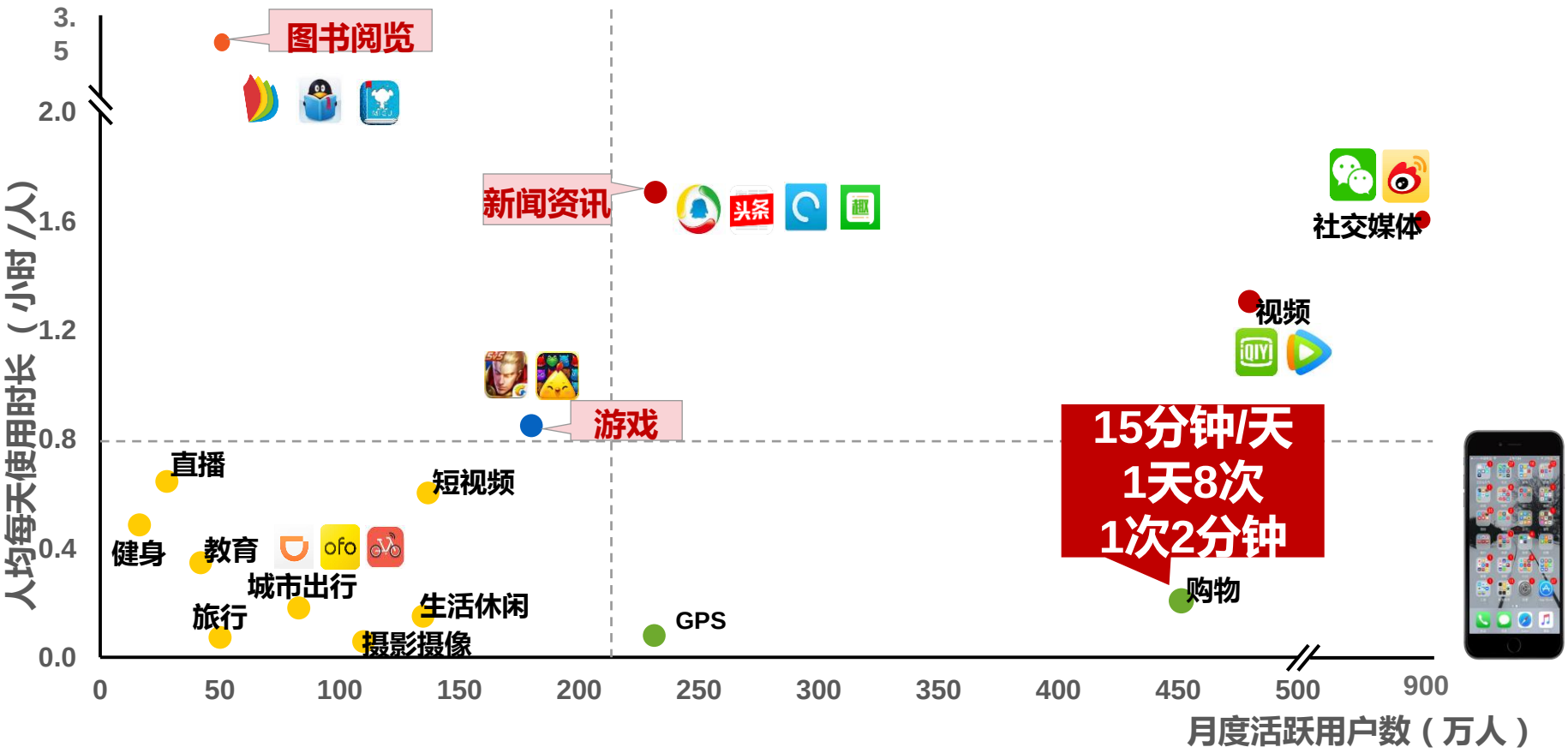
During the past years, digital has become the main media investment.



数据来源；凯度零售咨询研究和分析;
Data: Kantar Consulting

但是消费者在移动端的行为极为分散难聚焦- 短、频、快

However, mobile digital world is very fragmented and very difficult to focus.



数据来源；凯度零售咨询研究和分析;
Data: Kantar Consulting

了解目标消费群体其更倾向使用的软件可最大程度利用投放资源

Understanding target real purchased consumers preferred APPs could fully utilize the media investment efficiently.

年轻无孩家庭
Young Singles&Couples

年轻有孩家庭
Young Mixed Families

通讯&社交	视频	新闻资讯	电商购物	生活娱乐
微信 QQ 微博 支付宝	爱奇艺 腾讯视频 乐视 斗鱼 快乐购	今日头条 快报	淘宝 京东 618 唯品会 4.19 美团	秀 王者荣耀 K歌 酷我音乐

数据来源；凯度消费者指数媒体分析
Data: Kantar Worldpanel Media Profiling

样例

针对品牌购买者全网APP端爆炸级的口碑效应，带动销售

Using WOM effects of different APPs who have more brand purchasers could help to drive sales.

丰富营销使三养火鸡面知名度迅速提高

Sanyang's fame rapidly increased

三养在"泡面之神"评选的全球最辣泡面排行榜中位列第三

三养在综艺节目中频繁出境，常被作为吃辣挑战与惩罚

关于火鸡面的菜谱受到广泛

仅"同样是三养火鸡面，为什么有人说辣有人说甜？"的问题 回答数近200，浏览量突破75万

关于火鸡面烹饪和挑战的热门微博转发与点赞量破千

挑战火鸡面的视频进一步推高三养的热度

2015.01-2017.06"火鸡面"百度指数变化

2015.01-2017.04三养B2C销售额变化

2016以代购为主要渠道，被动销售为主，表现不温不火

2016下半年，三养放开出口贸易，通过经销商进行主动销售，配合系列社交媒体营销，实现快速生意规模增长

2017.01 三养授予1688进口货源全国代理权

数据来源；凯度零售咨询研究和分析; 百度指数

Data: Kantar Consulting；Index.baidu.com

创新之道

食品饮料品牌主需通过“三新”谋求适合时代发展的出路

3 News to lead growth for food & beverage.

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巧用创新提增量

What Makes an Innovation Bring Incremental Growth ?

巧用创新提增量– 新消费者/额外惠顾/单次购买提升/更高单价

What Makes an Innovation Bring Incremental Growth ?

1 新生活

满足消费者新的生活方式和情感诉求是才能为品类带来更多**新消费者**，同时满足高端化**更高单价**的趋势。

Meeting consumers' new lifestyles and emotional needs will help to bring more new consumers to the category. Meanwhile, it also follows the trend of Premiumisation.

2 新零售

新零售环境要求组织能够做出相应转换，结合场景化/智能化的赋能为品牌带来**额外的惠顾**和**增加的单次购买量**。

New Retails urges organizations to make changes that they can use new occasions/techonologies to bring extra trips or up-size consumers' baskets to their brands.

3 新平台

无论是线上还是线下，找准正确的平台才能激活购买，带来**新消费者**和**额外的惠顾**。

Finding the right platform online and offline will bring new consumers and extra trips to the brand as well.

INNOVATING
FOR GROWTH
ISSUE 1 | JUNE 2017
INCREMENTAL INNOVATION
MORE VALUABLE INNOVATION
INNOVATION DRIVERS
KANTAR WORLDPANEL

谢谢！