CONSUMER CONNECTION 2015

KANTAR WORLDPANEL'S CLIENT DAY

ROADMAP FOR GROWTH

MACRO ASIA TRENDS

How to make out
the trends into growth ?

Fabrice Carrasco

THE NEW REAL

Meet The New Customer in ASIA

CUSTOMER BEHAVIOUR IS DEEPLY AND RAPIDLY CHANGING

The way they communicate / get their information

The way they shop / what influence them

The choice they have

What they want

#CONVENIENCE | #HEALTH | #INDIVIDUALISM | #PRICE

Convenience

- The increasing of female labor participation and urban population leads to higher growth of convenience products
- Services like GOJEK and Grab Bike also contributed in this part

Health

- Increasing of health awareness result in healthier lifestyle and more popular sports events
- Health applications like Dokita, Dokter Gratis and InSTEDD are become more well known

Individualism

- Personalized coke by Coca Cola
- Personalized stuffs for bag and scarf from Hermes and LV

Price

- Promotion gave a significant impact to the value earned by FMCG
- Somehow its related to the declining of GDP growth. Statistics Indonesia (BPS) announced that the Indonesian economy grew 4.67 percent (y/y) in the second quarter of 2015, the slowest pace since 2009.

#PowerShift

Rapid Shifts in how people communicate and get their information makes it MORE DIFFICULT FOR BRANDS TO REACH CUSTOMERS

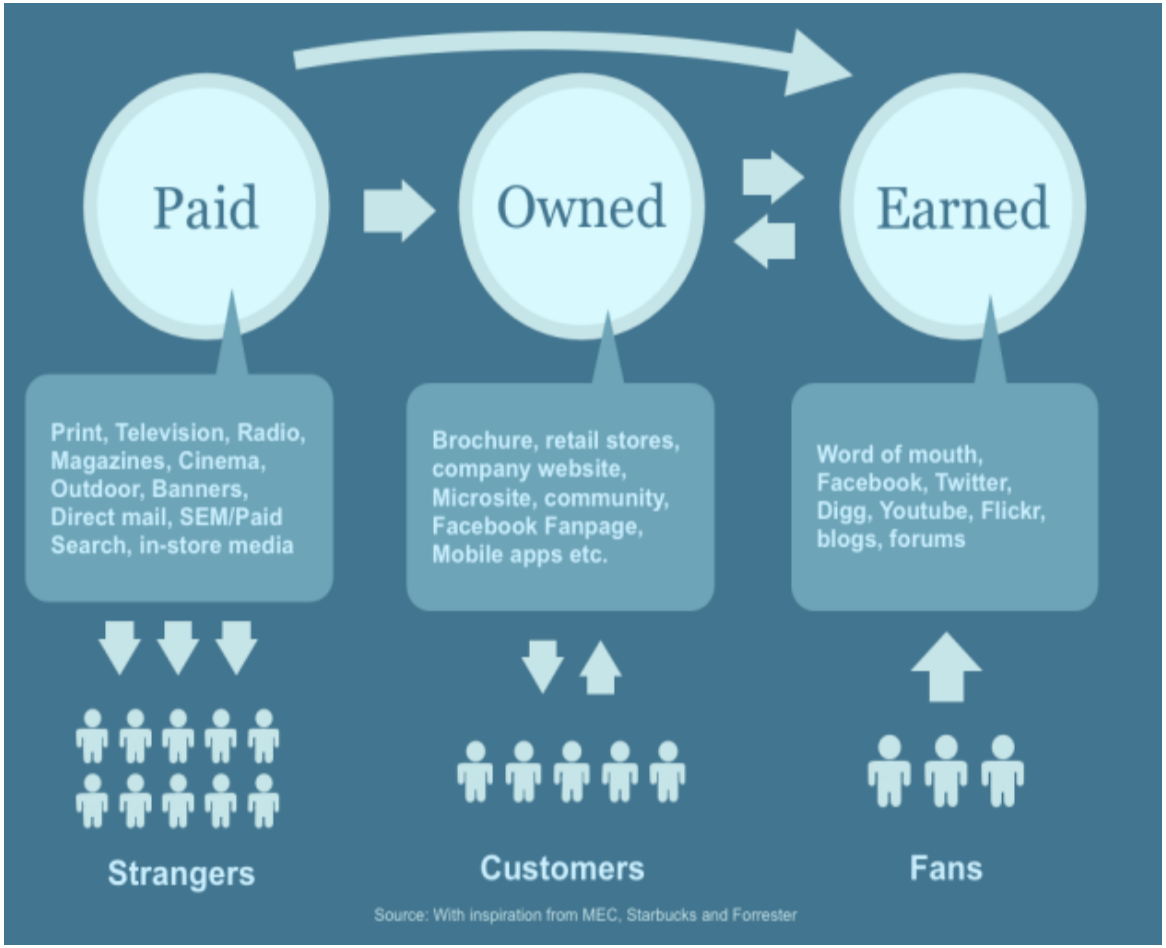
How they **watch TV**	How they **research**	How they **communicate**
on-demand via NetFlix, Amazon, HBO GO, etc	anywhere and anytime using smartphones and tablets	using social media; Facebook; Pinterest

Consumers are consuming Media the way they want, where they want (content, vehicle, place, time) creating more difficulties for brand to REACH their Consumers.

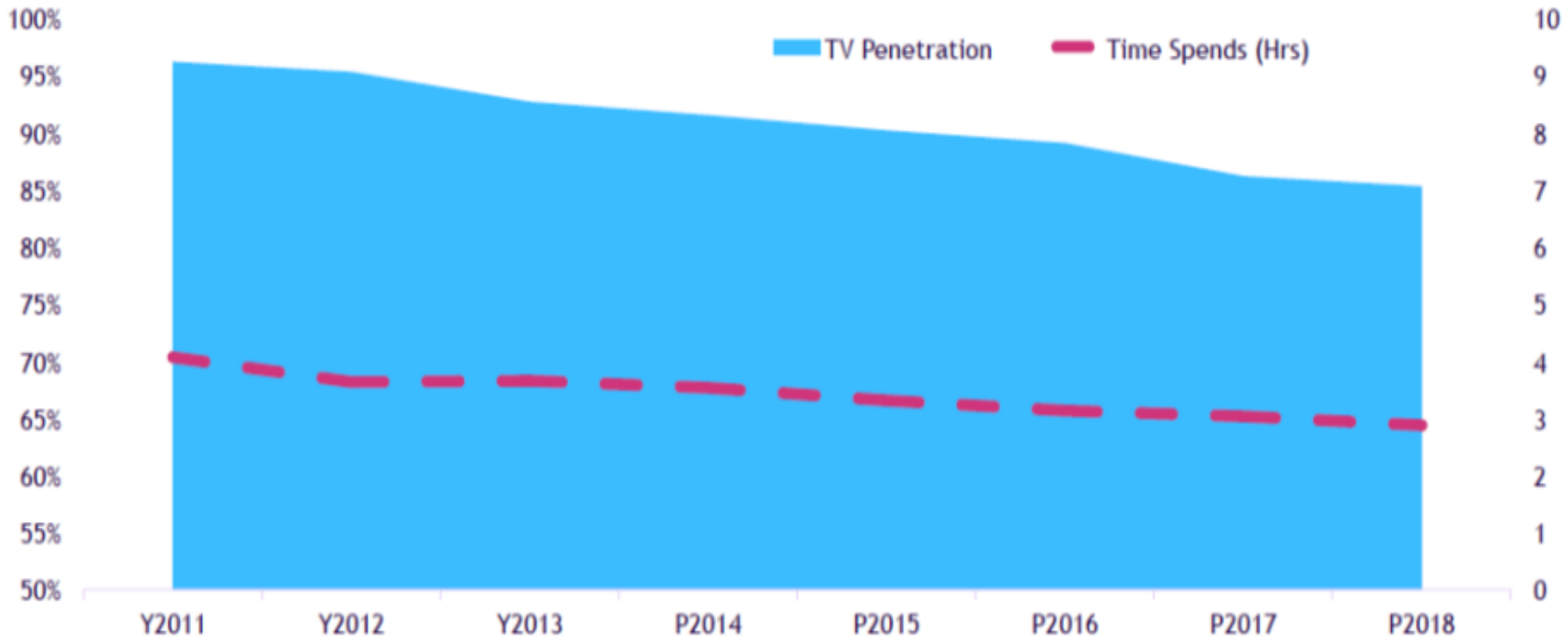
ZAPPING BEHAVIOR, FRAGMENTATION OF THE TARGET AUDIENCE

More information will mean more influential factors…

And a Communication that is not always controlled…

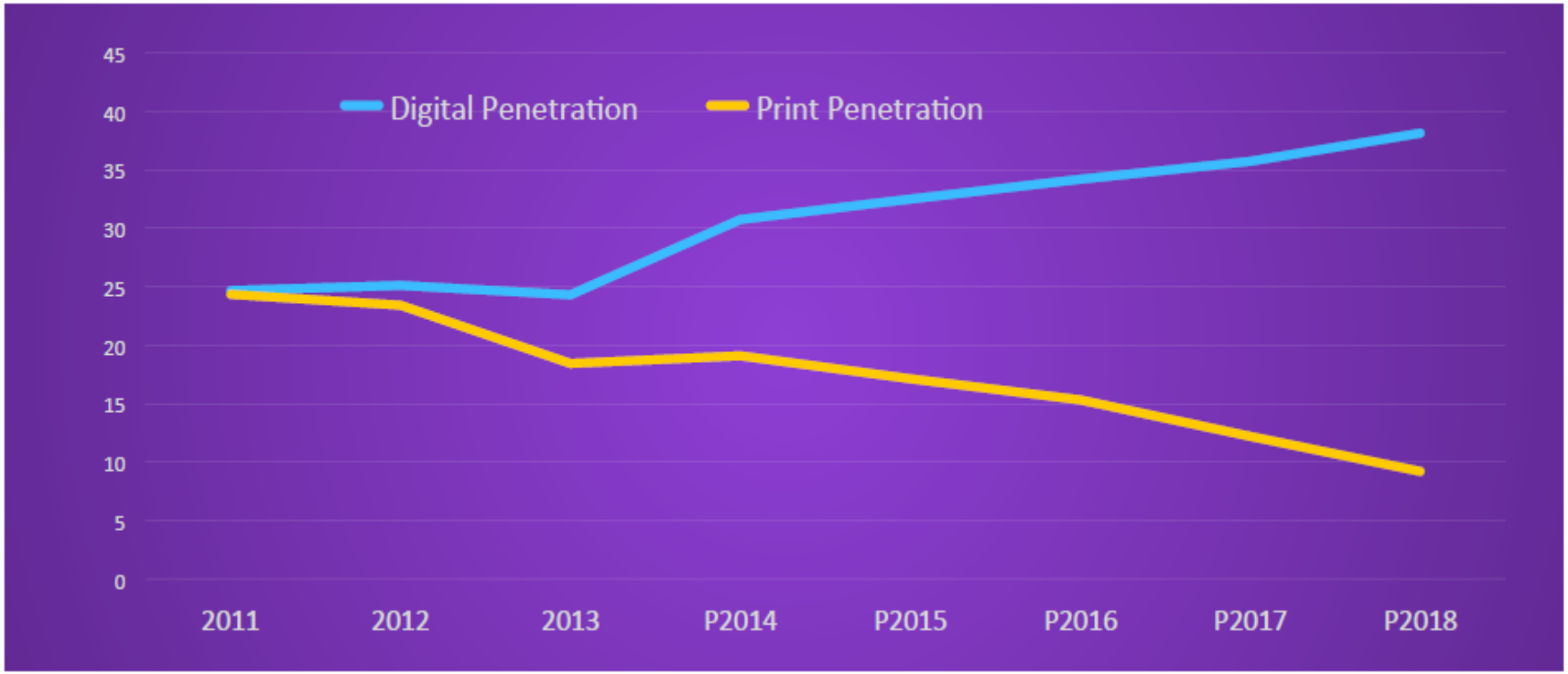


DECLINING ENGAGEMENT TOWARD THE TRADITIONAL WAY OF WATCHING TV IN INDONESIA



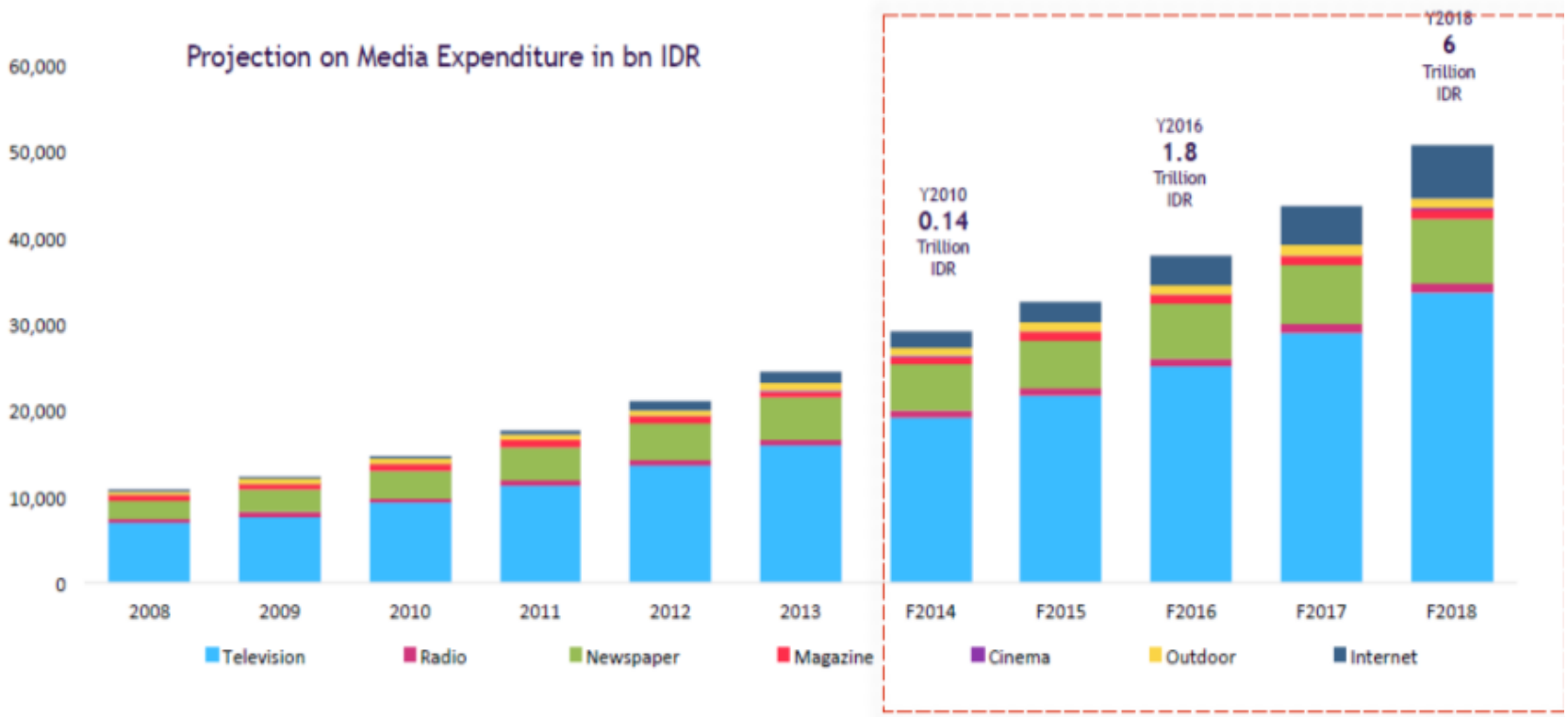
Source: Mindshare

DIGITAL PENETRATION ON UPWARD JOURNEY IN INDONESIA



Source: Mindshare

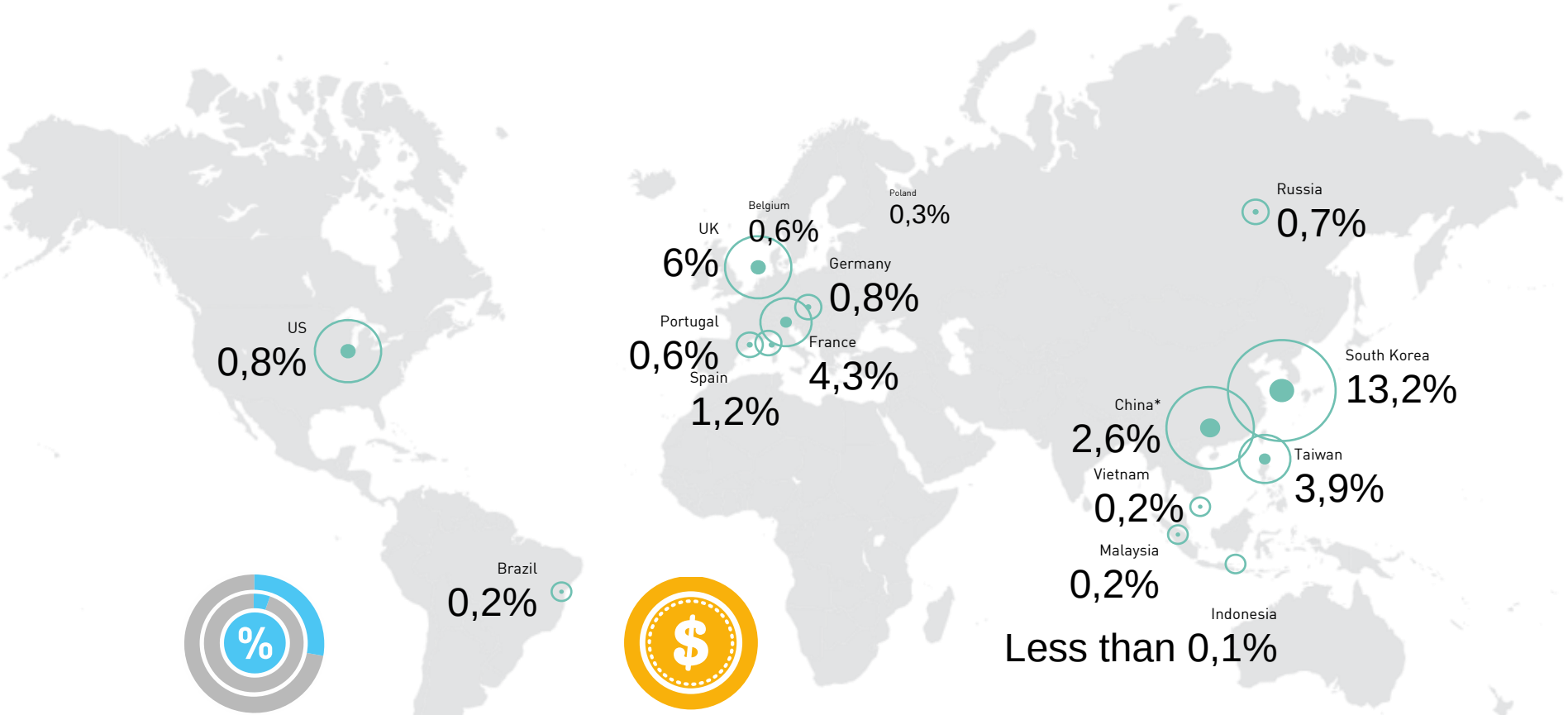
MEDIA SPEND IN INDONESIA WILL CONTINUE GROW WITH DIGITAL MEDIA SPEND TO ACHIEVE A SHARE OF 12% in 2018



Source: Mindshare

#Virtual

ECOMMERCE IS A PUZZLE OF PERFORMANCE



% Value share of ecommerce in FMCG market
3,9%

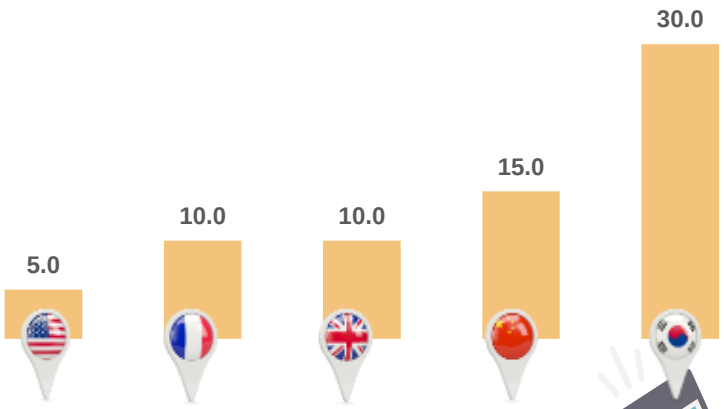
FMCG value generated by ecommerce channel
USD 35 bio

BUT ONE THING FOR SURE, ECOMMERCE IS UNSTOPPABLE

HUGE POTENTIAL
Penetration rate
24%

PROJECTION **2025**
Share of market

FAST GROWING
2014 value growth
+28%



The “Traditional” way of shopping is gone.

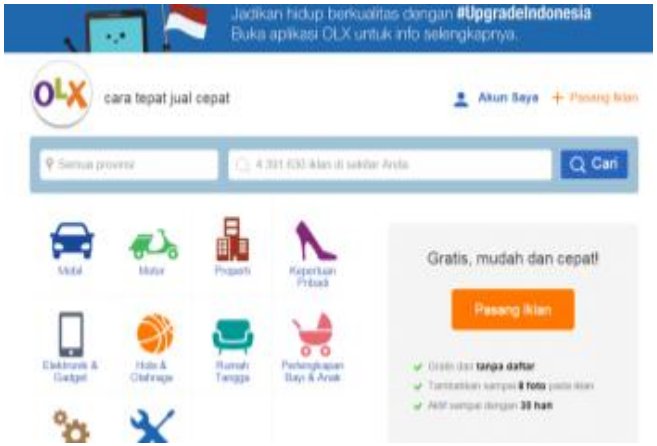
- The shift is no more between Traditional Trade and Modern Trade, but between Off-Line and On-Line (and consumers may jump)
- Outside of FMCG, stores are more and more considered as Window-Shopping or a way to determine which products to buy (Get to know the product, comparing features, feeling and touching), but decision to purchase is made on-line
- Need for Convenience and Best Deal seeker

ECOMMERCE IS BOOMING IN INDONESIA AND ONE OF THE MOST TALKED ABOUT SPACES IN SOUTHEAST ASIA'S TECH STARTUP WORLD.

Alfamart Luncurkan Toko Ritel "Online"

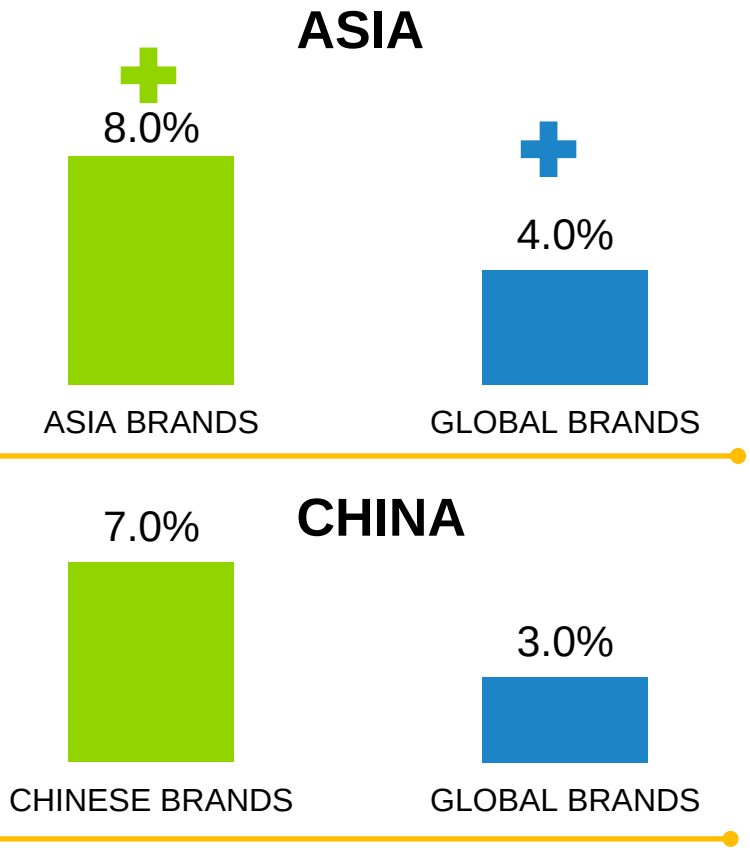
Sabtu, 23 Februari 2013 | 07.11 WIB

KOMPAS.com — Toko *online* mulai banyak di Indonesia. Banyak jenis usaha yang mulai menyentuh bisnis ini. Sebab, dengan sistem belanja seperti ini, konsumen dapat berbelanja secara langsung tanpa harus bertemu dengan pedagang atau pergi ke toko



#FromGlobalToLocal
#FromLocalToRegional

ASIAN BRANDS ARE GROWING AT TWICE THE PACE THAN GLOBAL BRANDS THEREFORE GAINING SHARE



Source: Kantar Worldpanel Asia / FMCG / BRAND FOOTPRINT 2015/ Value Growth %

ASIA BRAND POWER

#1
BE WILLING TO CHANGE AND ADAPT, AND NOT AFRAID TO FAIL.

#2
DEMOCRATISE YOUR CATEGORIES

#3
PURPOSE IS POWER.

#4
HELP PEOPLE MODERNISE, WITHOUT ABANDONING THE PAST

#5
INNOVATE AT LIGHTNING SPEED.

#6
USE DIGITAL FOR CREATIVELY INTERACTIVE COMMUNICATION

#7
STUDY CONSUMERS TO SHED LIGHT ON THE FUTURE

#8
AN 'EMOTIONAL WRAPPER' IS VITAL.

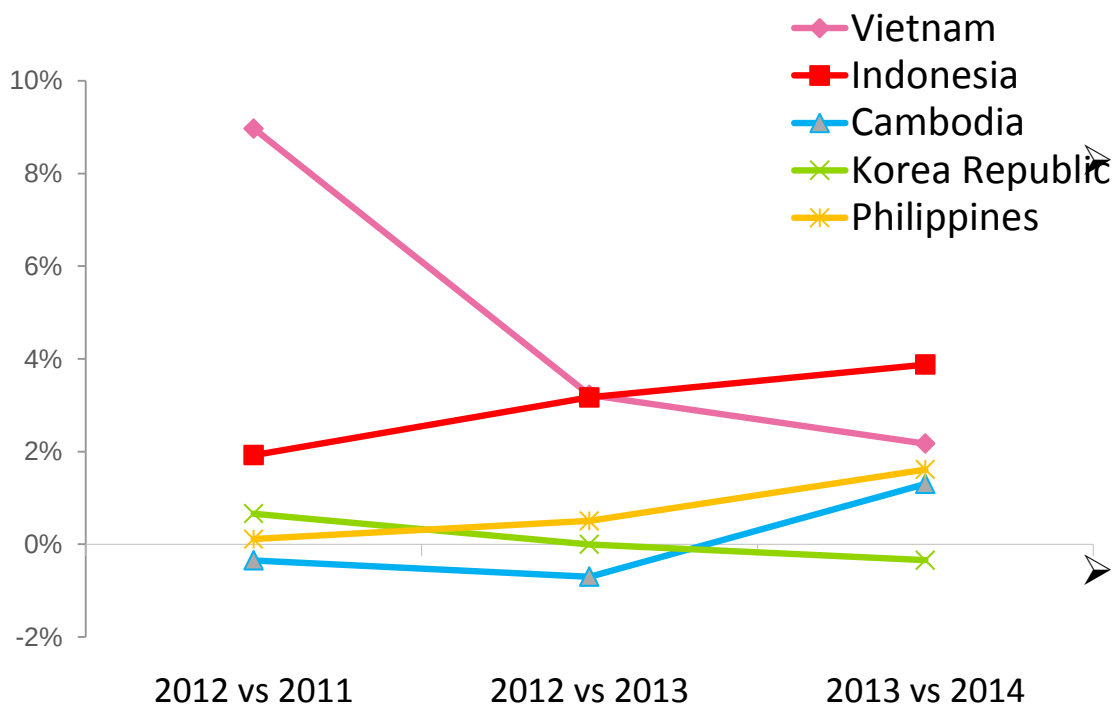
#9
NEVER COMPROMISE ON QUALITY.

#10
INVEST IN THE FUTURE.

#Premiumization

Purchasing Power is growing in most of the Asian countries

Asian Country Purchasing Power Parity (PPP) Growth – USD
Source: World Bank



- In Asia, and particularly in SEA we see for the last fifteen years a rapid growth of the disposable income, at a higher pace of the increase of the Cost of Living, creating a HIGHER POWER OF PURCHASE
- At first, people with increased power of purchase will use their extra money to get better equipped - for both PERSONAL EQUIPMENT (Car or motorbike, Computer, Tablet, Phone…) and HOME EQUIPMENT (Fridge, Micro-Wave, AC,…)
- Gradually people who will have completed this stage (or in parallel) will start to upgrade their FMCG consumption and this is where we are

WHEN CONSUMERS GET A HIGHER POWER OF PURCHASE, THEY HAVE THE CHOICE…

Consume more **VOLUME** of the same brands

Diversify their consumption, **NEW SEGMENTS, NEW FORMAT**

Consume more **PREMIUM** brands (one-step higher)

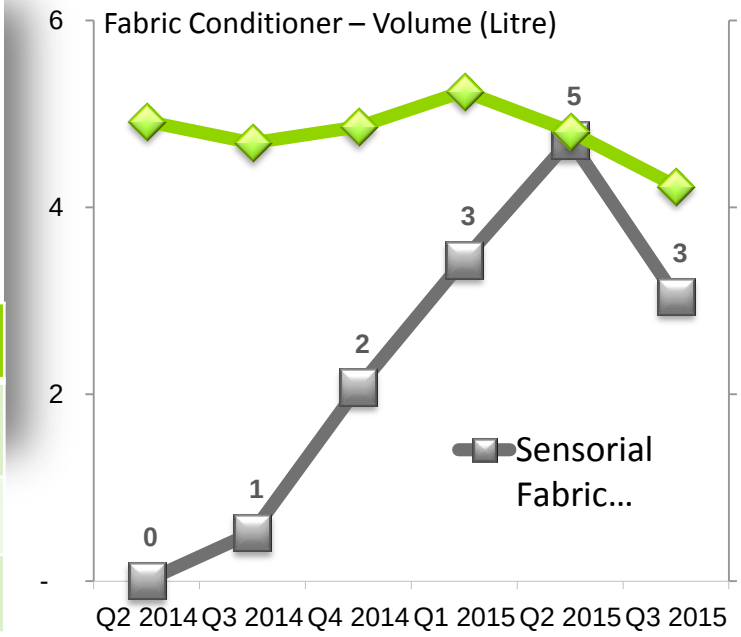
Consume **NEW CATEGORIES** (competitive or complementary)

Consume more **VOLUME** of the same brands

- ✓ Sizing Strategy: Big Pack sizes, Promotion, multi-products pack
- ✓ Loyalty Strategy: increase share of spend

Diversify their consumption, **NEW SEGMENTS, NEW FORMAT**

Buyers Group	Penetration
Only buy powder detergent	23%
Only buy liquid detergent	1%
Buy both	77%



- ✓ Innovation strategy: pack type
- ✓ Innovation strategy: flavor, product type
- ✓ Innovation strategy: product features, added value, sensorial
- ✓ Sizing strategy : smaller pack sizes

Consume more **PREMIUM** brands (one-step higher)

Keep your buyers by offering them the "one-step higher" choice

Additional buyers for the brand ?

3%

of the growth of premium variants

Additional spending from the brand buyers ?

92%

of the growth of premium variants

Switching with the brand other variants ?

5%

of the growth of premium variants

Based on Gain & Losses on 20 premium variants

Will these categories be your new competitor, or will you develop an offer into those?

Consume **NEW CATEGORIES** (competitive or complementary)

Evolution of the penetration and average spending per HHs - MAT Q1 2015 vs. YA

Baby Wipes

+4 pts **+8%**

Mouthwash

+3 pts **+29%**

Facial Tissue

+9 pts **+22%**

Frozen Food

+5 pts **11%**

Keep an eye on what could be the categories of tomorrow

- Categories over consumed by the High Income group in Indonesia

Top 6 Category - Penetration %
MAT Sep 2015

Mineral Water
78%

Chocolate
75%

Canned Food
67%

Frozen Food
50%

Air Freshener
31%

Cheese
20%

A SHORT TERM PERSPECTIVE

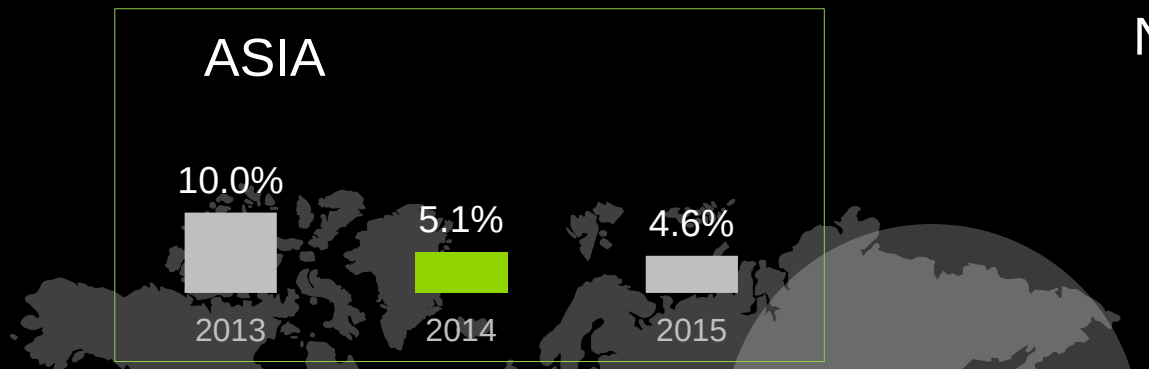
How buyers are reacting to the economy slow- down

Nearly all countries feel the hit

	Thailand	Vietnam	Indonesia	China	Philippines	Malaysia	Taiwan	South Korea
GDP growth	< 1%	5% - 7.5%					3% to 4%	
Inflation Rate	< 3%	3% - 6%	> 6%	< 3%	3% - 6%	3% - 6%	< 3%	< 3%
Consumer Confidence Index (CCI)	Positive outlook, but declining			Positive outlook, and growing		Negative outlook, and declining		

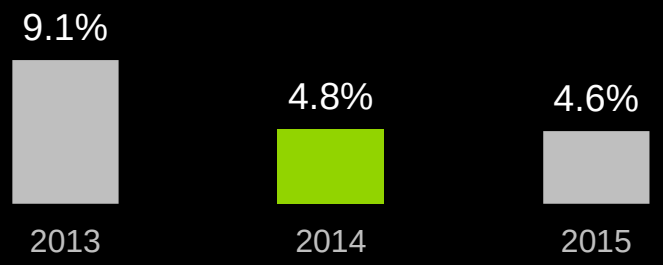
FMCG GROWS AT 4,6% - HALF THE GROWTH THAN TWO YEARS AGO

DECELERATION IN ALL SUB-REGIONS

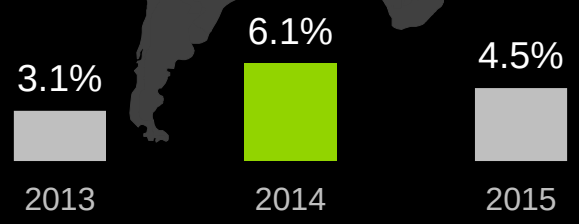


ASIA

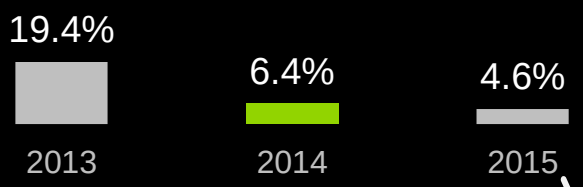
NORTH ASIA



INDIA



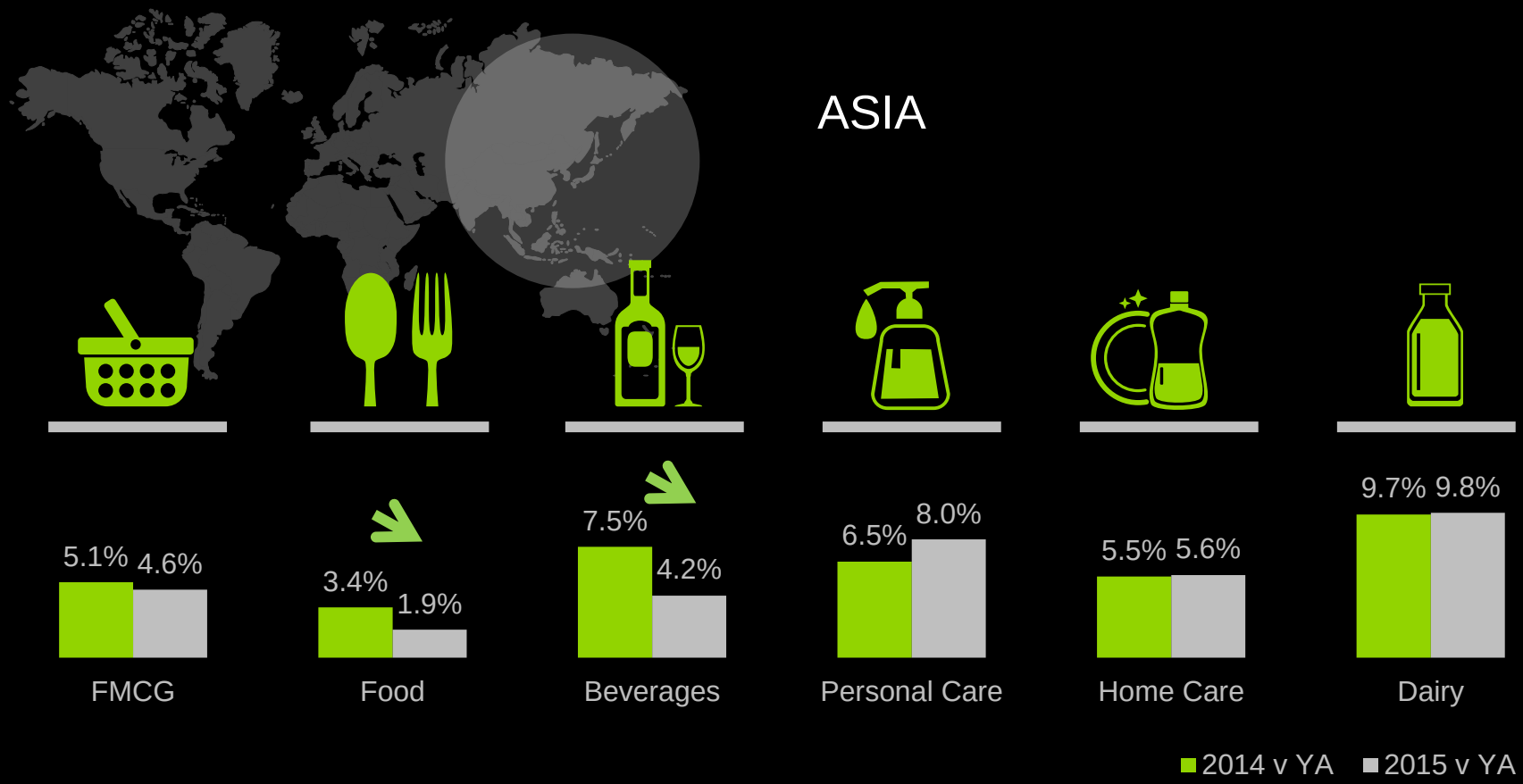
SEA



FMCG / MAT Q2 2015 & 2014 & 2013. North Asia: China, Taiwan, Korea.
SEA: Urrban Vietnam, Indonesia, Thailand, Philippines, Malaysia

SLOWDOWN SEEN IN FOOD & BEVERAGES

THESE BASKETS ACCOUNT FOR 60% ASIAN HOUSEHOLDS´S FMCG SPEND



ASIA / MAT Q2 2015 & 2014

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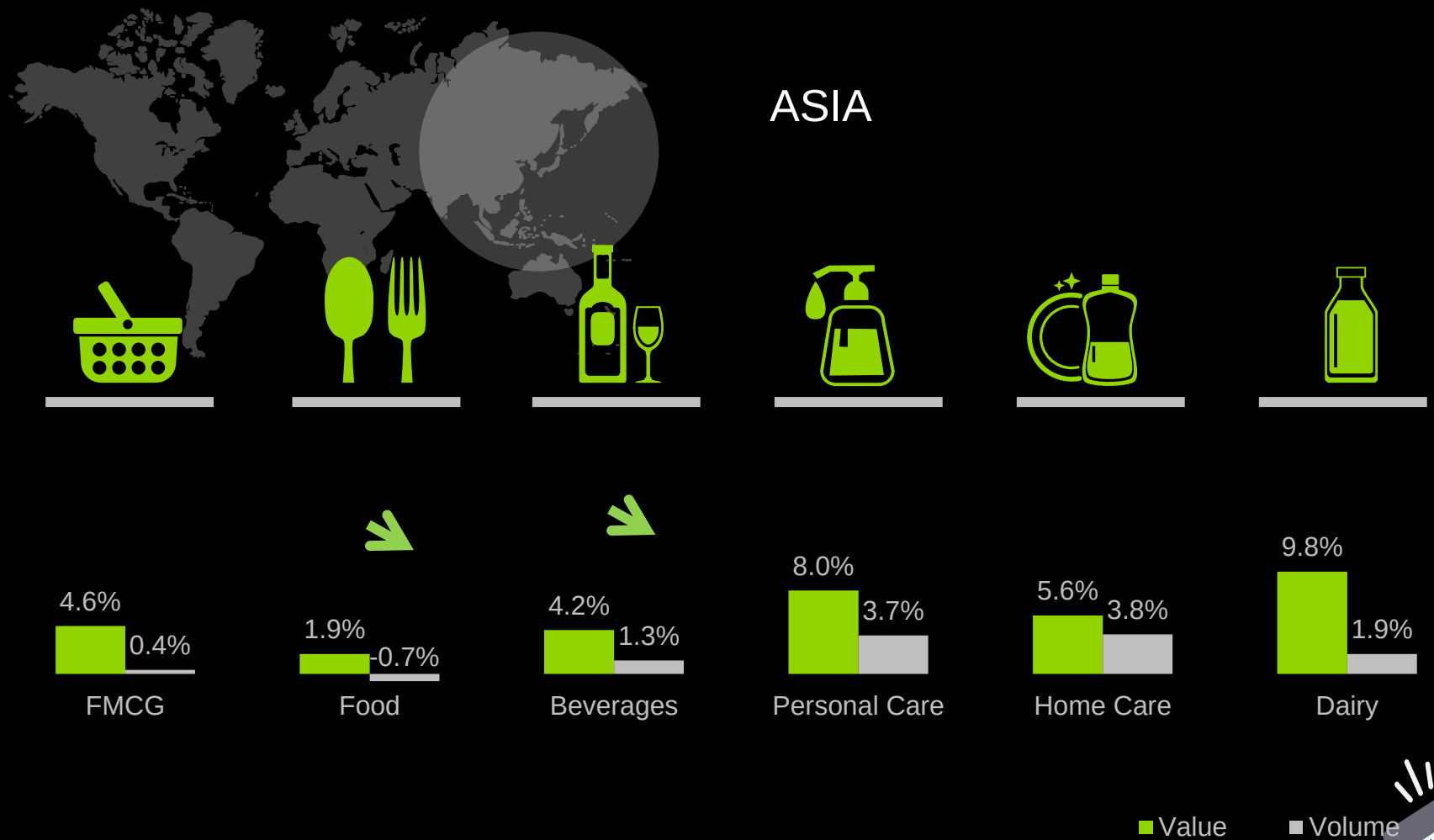
ROADMAP FOR GROWTH

IN VOLUME, FMCG IS GROWING ONLY 0,4%
NON-FOOD GROWING THE FASTEST AT 3,8%



ASIA / MAT Q2 2015 & 2014

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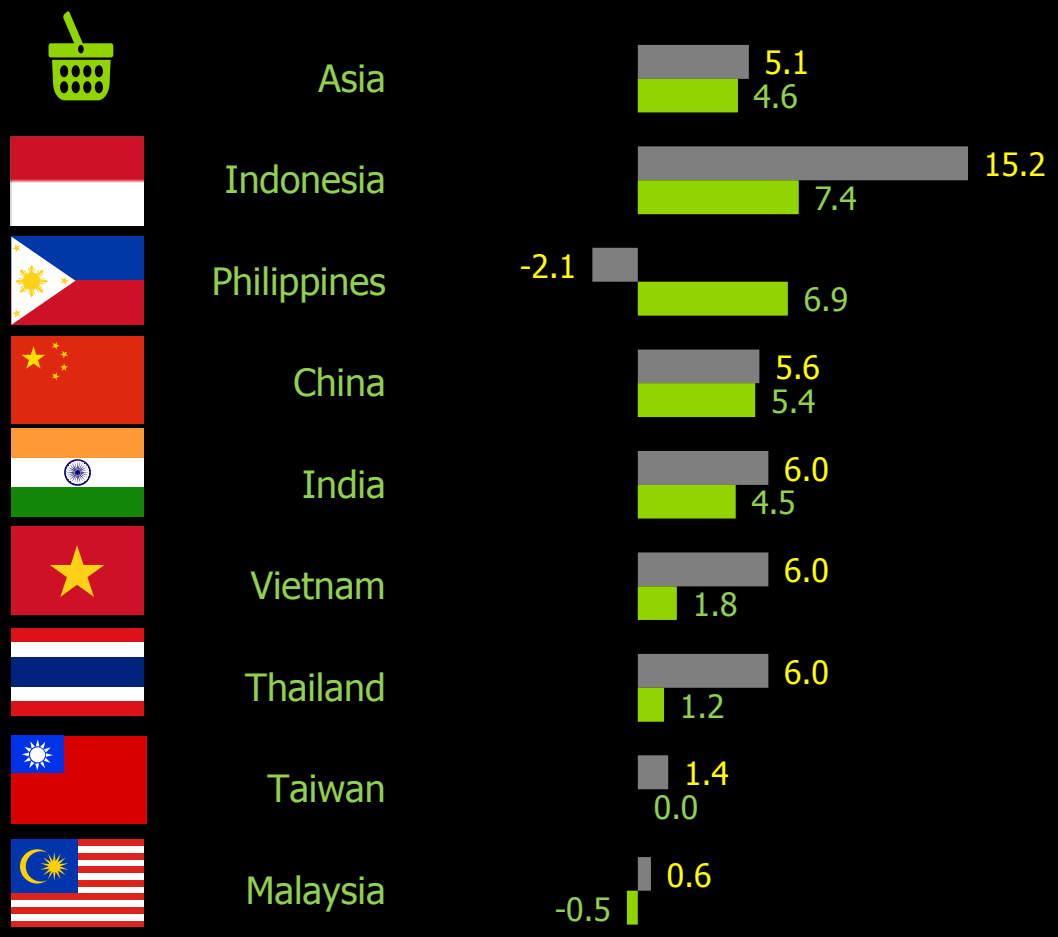
CONSUMER CONNECTION 2015

ROADMAP FOR GROWTH

FMCG GROWTH SLOWINGDOWN ACROSS ASIA WITH CONTINOUS SLOW DOWN

YET, INDONESIA STILL EXHIBIT HIGHEST GROWTH



ASIA / MAT Q2 2015 & 2014 – Value Growth FMCG

MAT'14 MAT'15

How buyers are reacting to cope with today's reality?

1

Shopping less often or Dropping some cats

2

Changing Pack Size regular choice

3

Hunting promotions or Best Deal

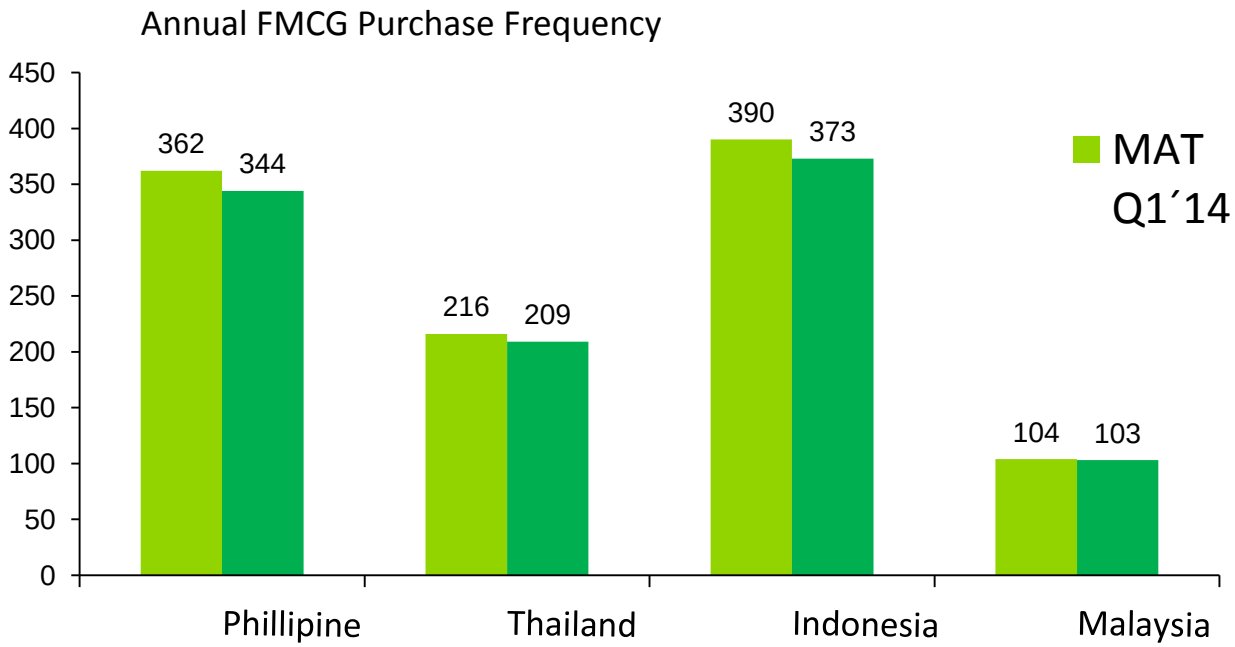
4

Changing the brand choice

1

Shopping less often

DECREASING FREQUENCY OF SHOPPING TRIP IS THE NEW NORM AS SHOPPERS TRY TO MANAGE THEIR CASH FLOW



2

Changing Pack Size regular choice

SHOPPERS LOOKING FOR VALUE FOR MONEY BY UPSIZING THEIR PURCHASE FOR NECESSITY CATEGORIES

% of categories that enjoy upsizing

50 %	43 %	41 %
VIETNAM	MALAYSIA	INDONESIA

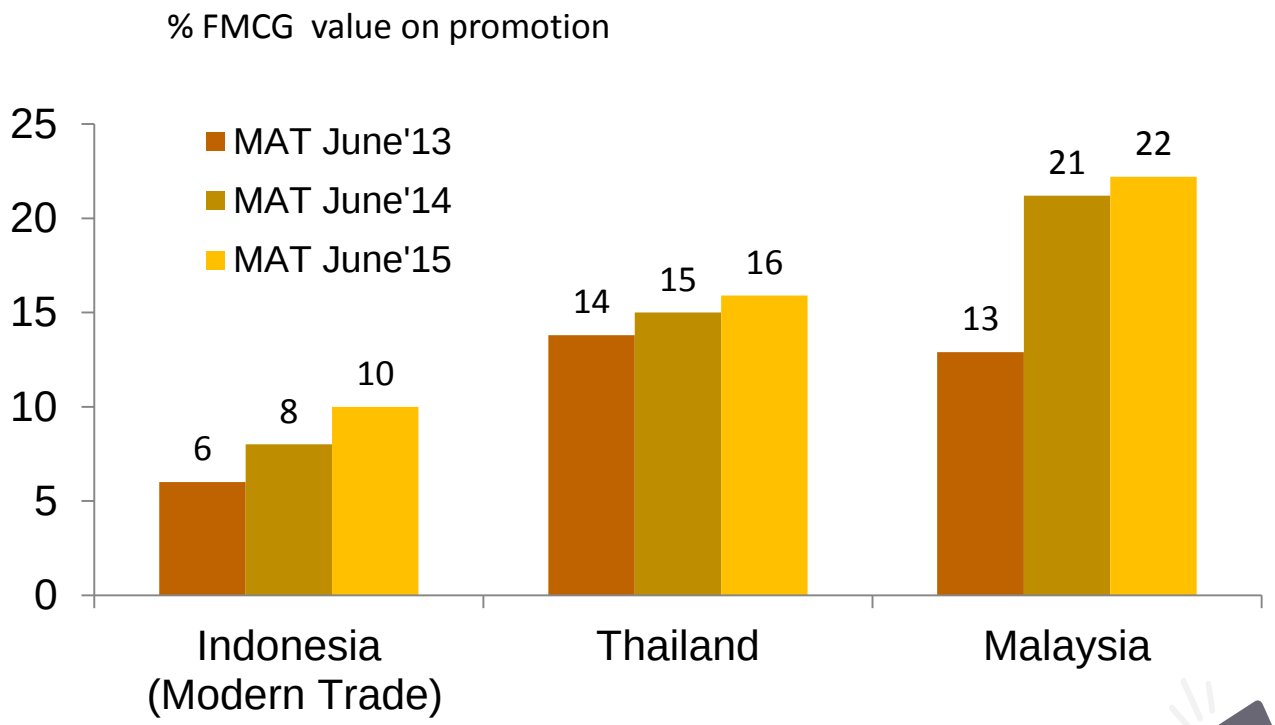
&

SHOPPERS LOOKING FOR PLEASURE BY DOWNSIZING THEIR PURCHASE FOR PERSONAL CARE CATEGORIES

UPWARD SPEND ON PROMOTION CONTINUES AS CONSUMER LOOKING FOR MORE "VALUE FOR MONEY" OFFERING

3

Consumers are promotions



FUTURE OUTLOOK IS STILL POSITIVE FOR INDONESIA

Large Population → 60% less than 30 years
→ Awaiting Demographic Dividend

Foreign Inflows into Portfolio & Direct Investments is still healthy

Driven by Internal Consumption

Owing to Large Consuming Class

Newer Markets Opening Up
MAC in Sumatra, Kalimantan & Sulawesi expected to be big by 2020
Many pockets here grew well in Q1 2015

You need to get #Ready

Understand the new **REAL**

Analyse the new Purchase triggers and reinvent the relation with your customers

Compete in the Premiumisation game

Meet your customer where they shop

Innovate to answer the new needs and aspirations

Help your customer to adapt to the short term challenge

ROADMAP FOR GROWTH

THANKS!

KANTAR WORLDPANEL

CONSUMER CONNECTION 2015

CONSUMER CONNECTION 2015

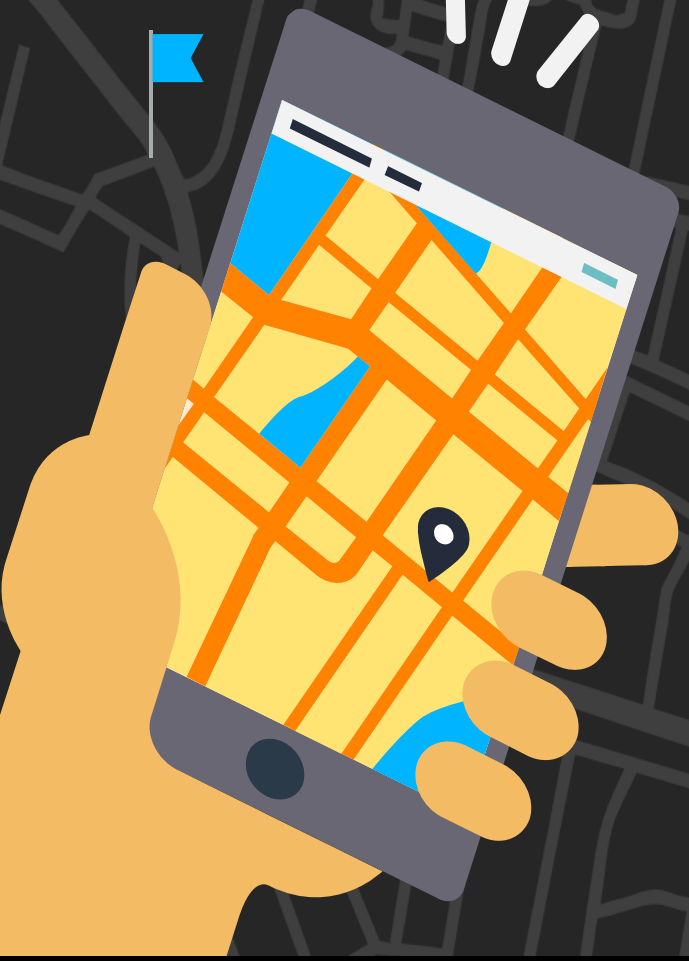
KANTAR WORLDPANEL'S CLIENT DAY

ROADMAP FOR GROWTH

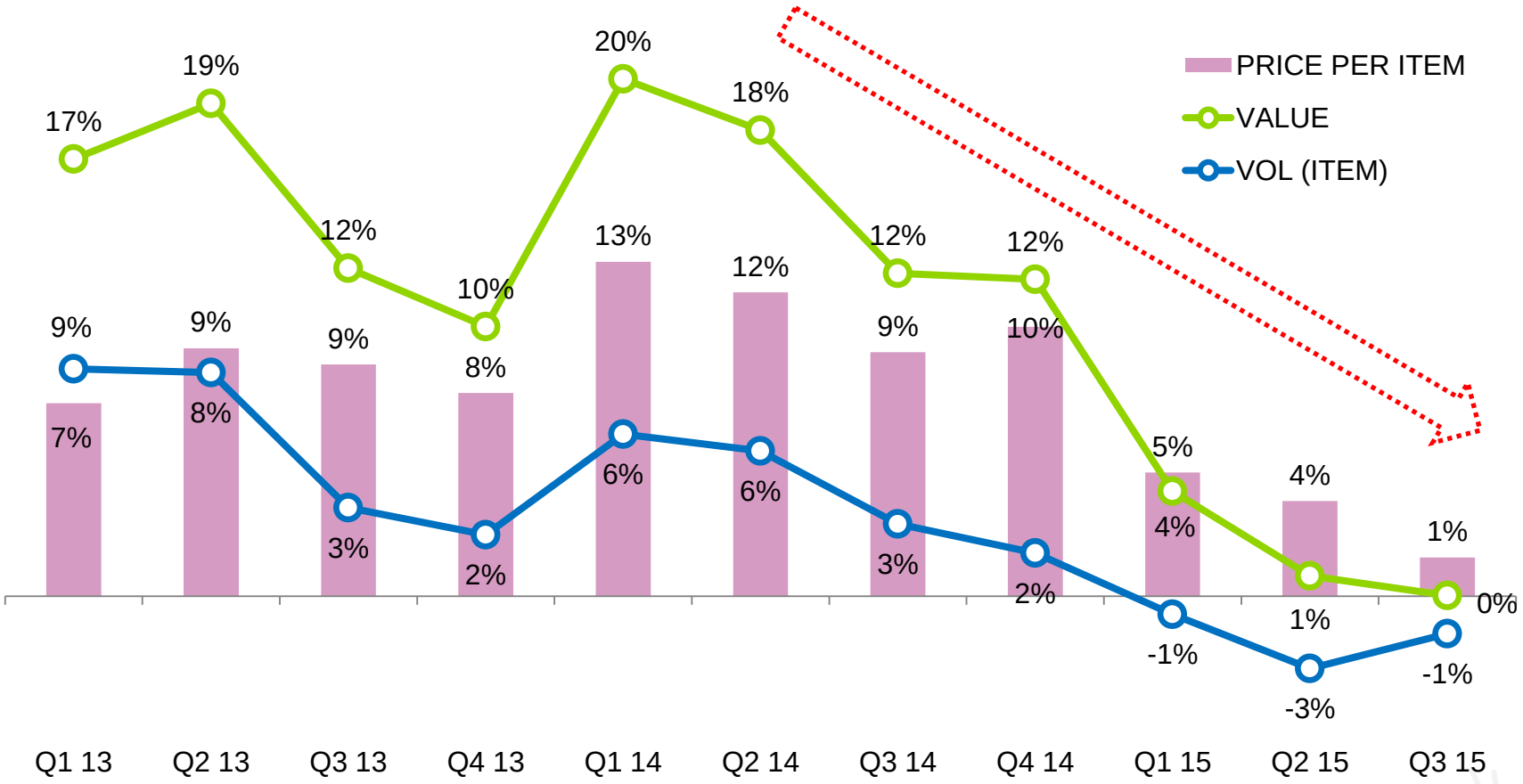
Asia Brands Power

5 Rules to get the GROWTH you need

Soon Lee
General Manager, Indonesia

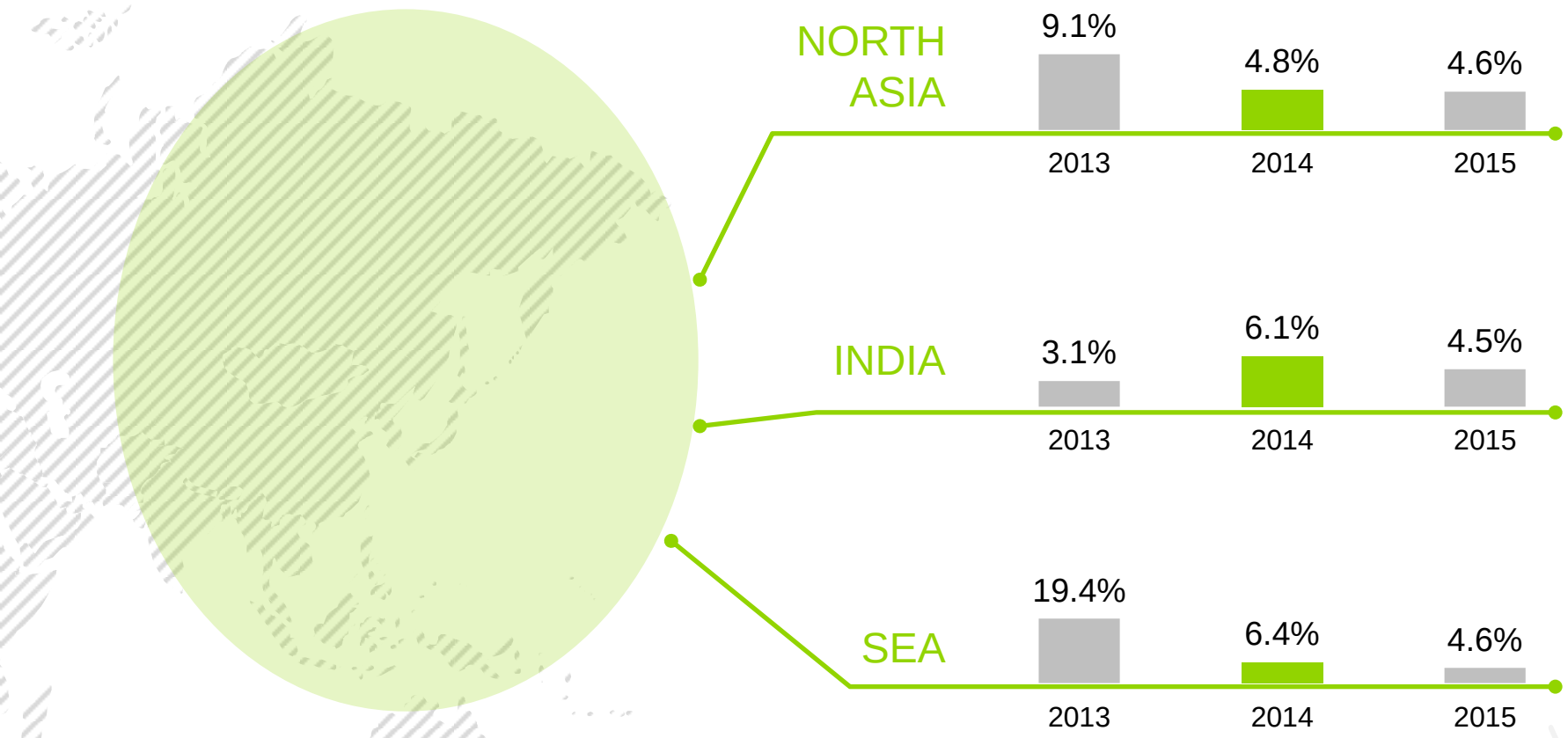


Growth is sought after but definitely harder to attain in recent times



Total KWP FMCG: Quarterly Growth Rates (National Indonesia)

Growth deceleration happens in all sub regions in Asia



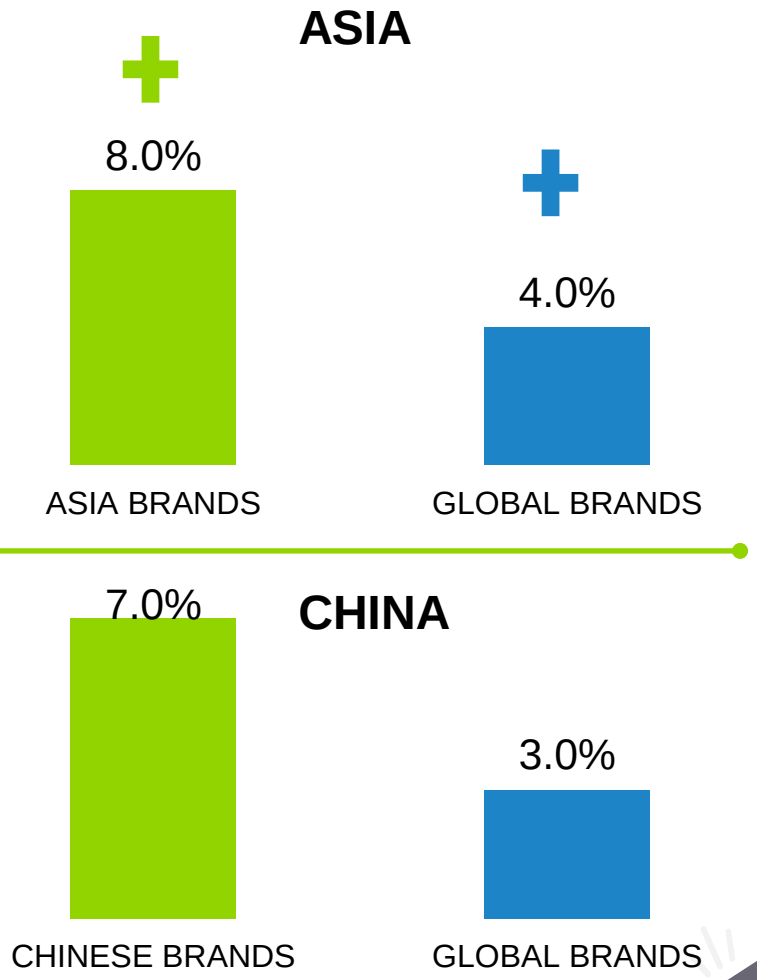
Source: Kantar Worldpanel Asia / FMCG / MAT Q2 / VALUE GROWTH%

But, “DID YOU KNOW” that…

Asian brands are growing at 2x the pace of global brands; therefore gaining share in Asia

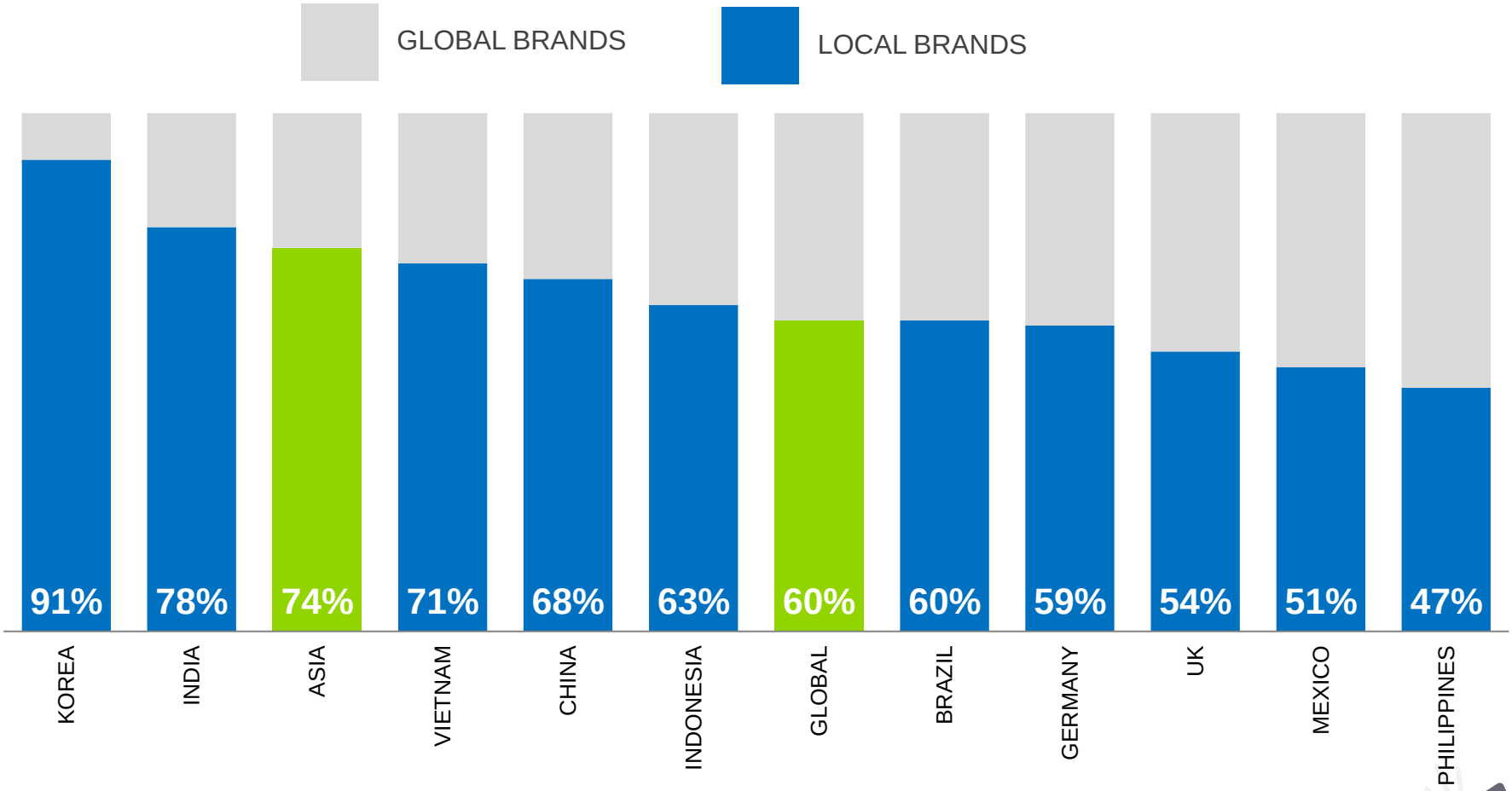
INDONESIA

Local brands 2x growth rate of Global Brands



Source: Kantar Worldpanel Asia / FMCG / BRAND FOOTPRINT 2015/ Value Growth %

Asia is unique – Homegrown brands dominate FMCG market more than Global average



Source: Kantar Worldpanel Asia / FMCG / BRAND FOOTPRINT 2015/ Value % Local Brands

To understand common themes on what drives Asian brands' growth

…we interviewed 11 CEOs in Asia

11

Asia brands talks

GODREJ
Mr.Sunil Kataria,
Chief Operating Officer

MARICO
Mr. Sameer Satpathy,
CMO

YFY
Mr. Felix Ho,
Chairman

SANQUAN
Mr. Chen Xi
CEO

VINDA
Ms. Dong-Fang Chang
CEO

ICHITAN
Mr. Tan
Passakornnatee, CEO

REBISCO
Mr. Jonathan Ng,
President

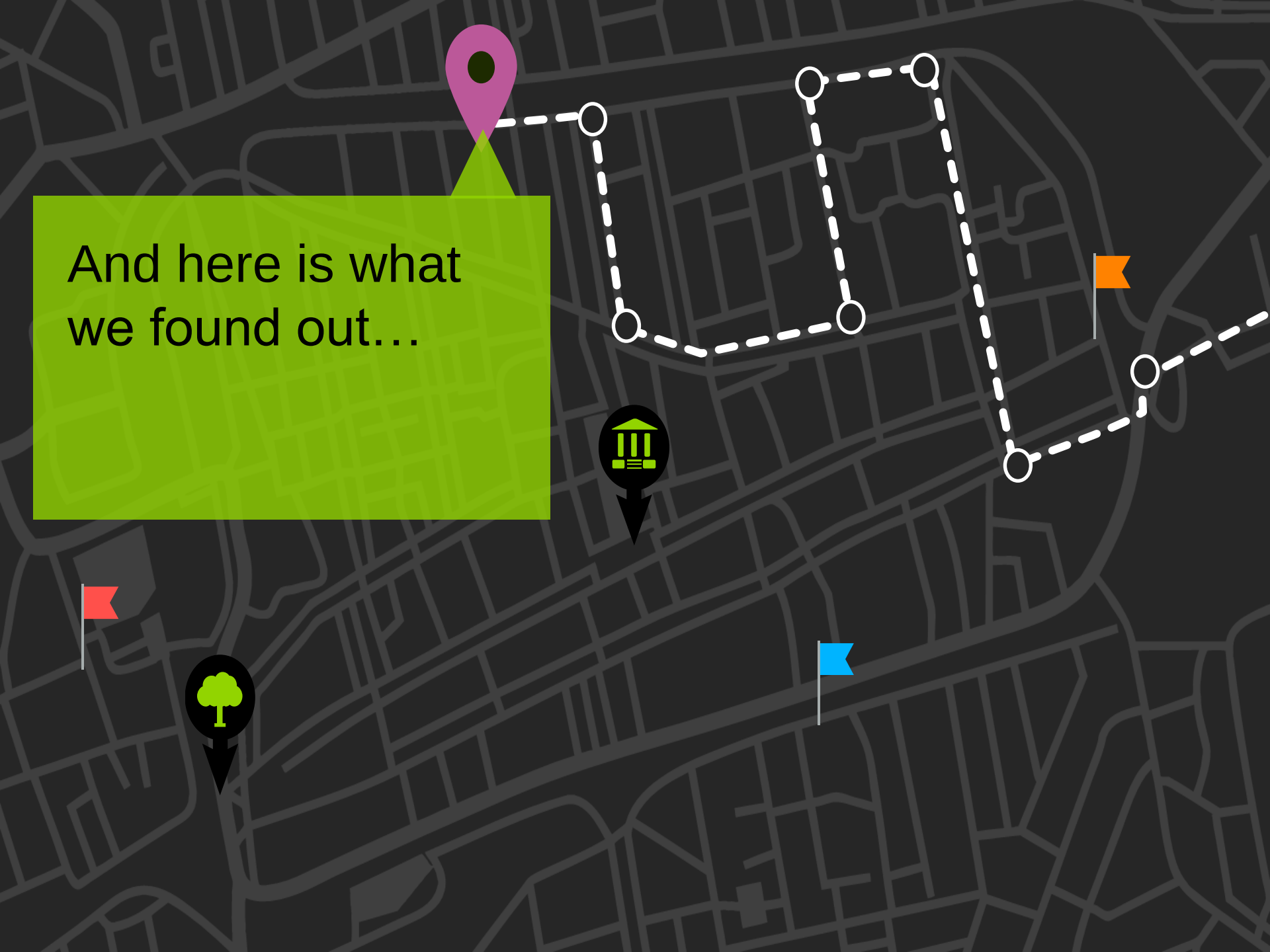
MONDE NISSIN
Mr. Henry Soesanto,
CEO

AEKYUNG
Mr. Seok-Joo Lee,
Managing Director

MASAN
Mr. Seokhee Won,
CEO

MAYORA
Mr. Andre Sukendra
Atmadja, President

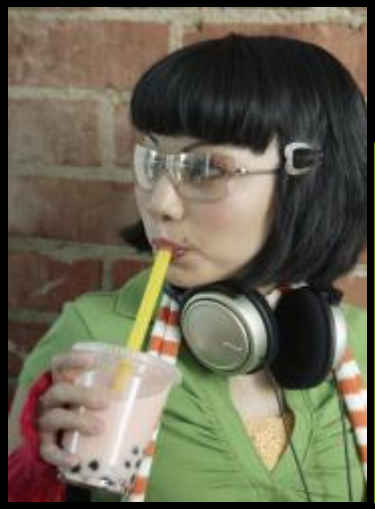
And here is what we found out…



THE 5 ‘POWER LEVERS’

THAT ARE
CHANGING THE GAME

#1
MASTERS OF METAMORPHOSIS



#2
BUILD THE NATION, BUILD THE BRAND

#3
WORLD-CLASS INNOVATION WITH A LOCAL TWIST

#4
DIGITISE AND HUMANISE

#5
DATA-LED INTUITION

#1
MASTERS OF
METAMORPHOSIS

#1 MASTERS OF METAMORPHOSIS
Expansion plan

#1 MASTERS OF METAMORPHOSIS
Big ambitions

#1 MASTERS OF METAMORPHOSIS
A clear course

#1 MASTERS OF METAMORPHOSIS
From Asia to the world

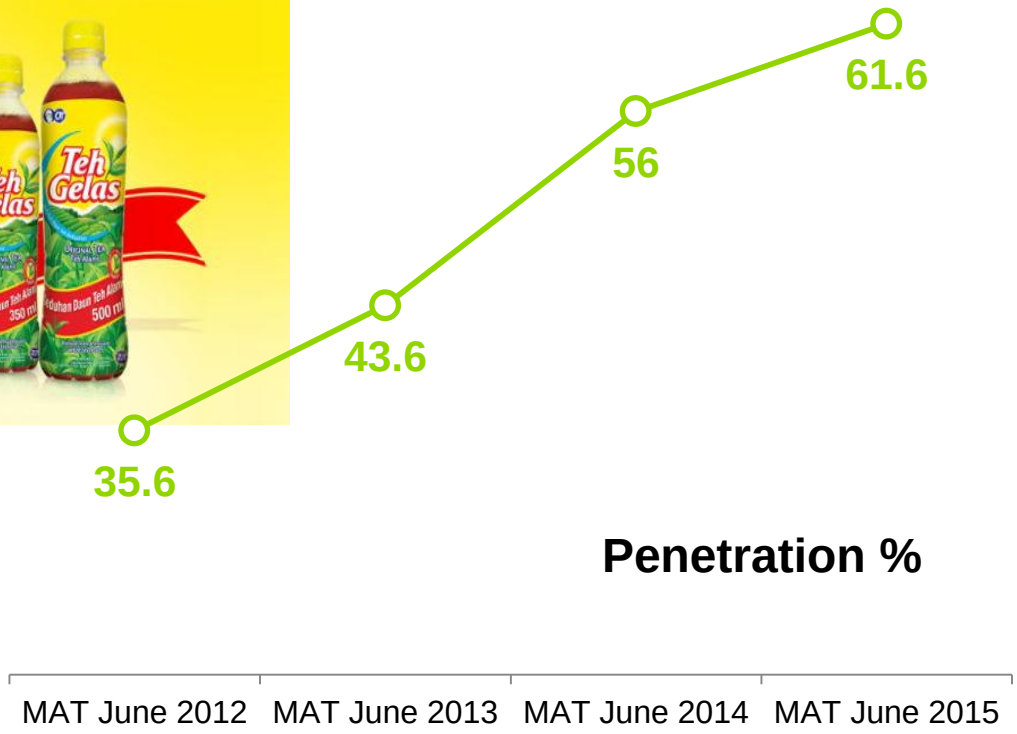
#1 MASTERS OF METAMORPHOSIS
With determination

#1 MASTERS OF METAMORPHOSIS
With courage

#1 MASTERS OF METAMORPHOSIS
Unite the company...

#1 MASTERS OF METAMORPHOSIS
around a shared vision

Aggressive expansion of Teh Gelas: transforming brand



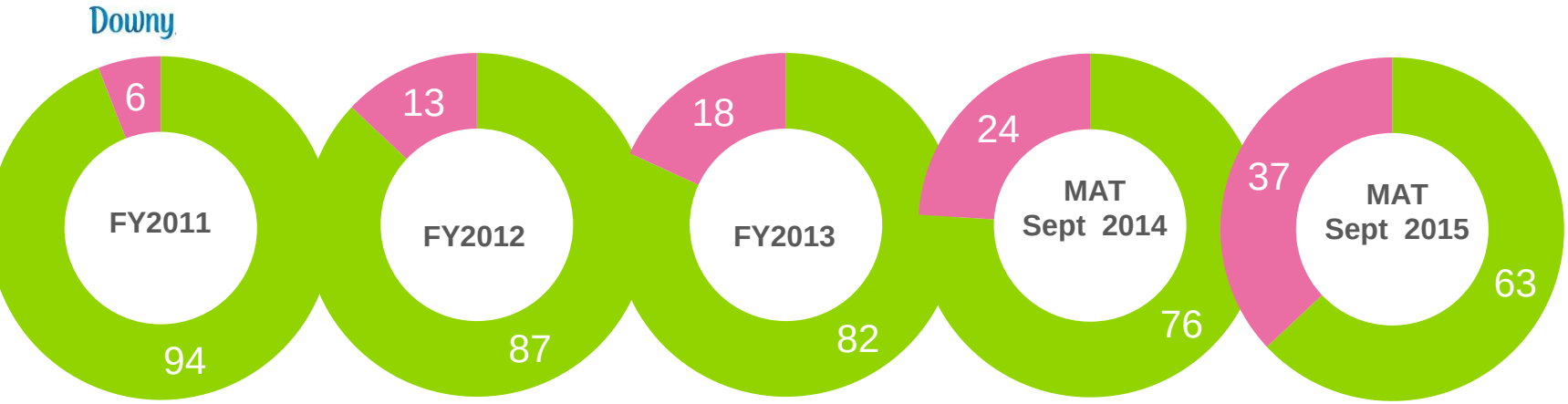
Convenience
Tea in a Cup

RTD Tea
-1.5% Vol
Teh Gelas +25%

Big ambition

Affordable pricing

Transformational journey of Downy



Volume %, Urban Indonesia HHs, Fabric Conditioner

48%
Penetration in Year 1 of launch

90%
Penetration in Year 5

#2

BUILD THE NATION, BUILD THE BRAND

#2 BUILD THE NATION, BUILD THE BRAND

DECIDE ON YOUR ROLE: RESPONSIBLE FOR FUTURE GENERATIONS

Purpose is power

Uplift individuals
Uplift the community
Uplift the nation

Democratise your market

Accessible & affordable

BUILD A BETTER SOCIETY

Nila Aye via Getty Images

Being a Mom
Means Always
Being Busy!
We understand this and we can help...

Uplifts Moms!

Ride the global/Iodonesian trend of

"Time Poor" and "In Need of Convenience" moms

successfully

+ 1 million more HHs buying

+11% more purchase frequency

+25% Value growth YoY

BIG HELP to moms who are busy and have limited time

#1 BRAND
Affordable price
IDR 1,300 – 1,900

Time saving, convenient, tasty, hassle free, practical

75% penetration

Uplifts Moms!

+1.5 million HHs
+33% Value
+20% Volume

Penetration %
MAT 2013: 56%
MAT 2014: 64%
MAT 2015: 67%

Convenient, Practical

“CHANGE YOUR HAIR OIL WITH PRIDE”

MARICO EMBARKS ON A PURPOSE DRIVEN CAMPAIGN

Nihar Naturals Shanti Badam Amla Hair Oil enables women to actively contribute to progress as part of the proceeds from the brand goes towards children's education

+18%
Value Growth

+5.5 M
House holds

1.1 M
Kids two year education

#3

WORLD-CLASS INNOVATION WITH A LOCAL TWIST

#3 WORLD-CLASS INNOVATION WITH A LOCAL TWIST

FIND COMPETITIVE ADVANTAGE IN CULTURE

Respect heritage

Reflect national culture, align with local values, genuinely Asian

Identify unspoken cultural truths

Basics delivered in an authentic way

Best of two worlds

Modernise without abandoning past; fuse technology & tradition

QUALITY, QUALITY, QUALITY

“WARDAH HAS RE-SHAPED THE INDONESIAN COSMETICS CATEGORY”

Cultural authenticity behind continued success: Halal cosmetics”

+24%
Value Growth

Strong Halal claims

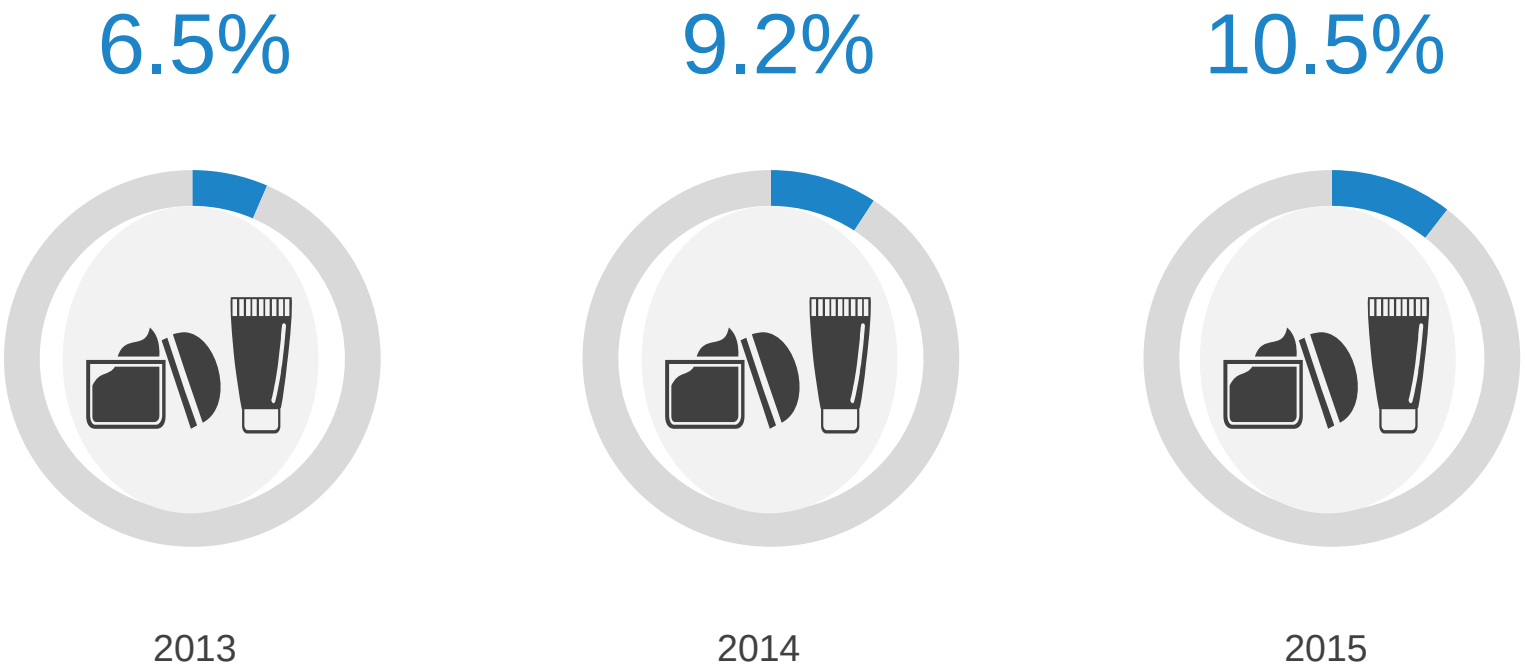
Taps into ‘Jilbaber style’ —chic, fashionable and beauty conscious

The muslim population is expected to grow twice As fast as the rest of the world’s population between now and 2050.By then, muslims will account for 10% of Europe’s population, a reason to tap into halal beauty segment

5.3M INDONESIAN HOUSEHOLDS HAVE TRIED WARDAH´S PRODUCTS

SUCCESS IF PROVED BY INCREASED SHOPPER TRIAL YEAR AFTER YEAR

Household Penetration%



Shampoo market +0.6% Volume
Sunsilk +12%

Clean & Fresh
+46.2%
Added 360k HHs

3.1% share of Sunsilk BUT contributed 9% of Sunsilk's growth

Brand that is riding on Hijab trend

#4

DIGITISE AND HUMANISE

#4 DIGITISE & HUMANISE

Digitise

Use digital creatively, invest on e-commerce

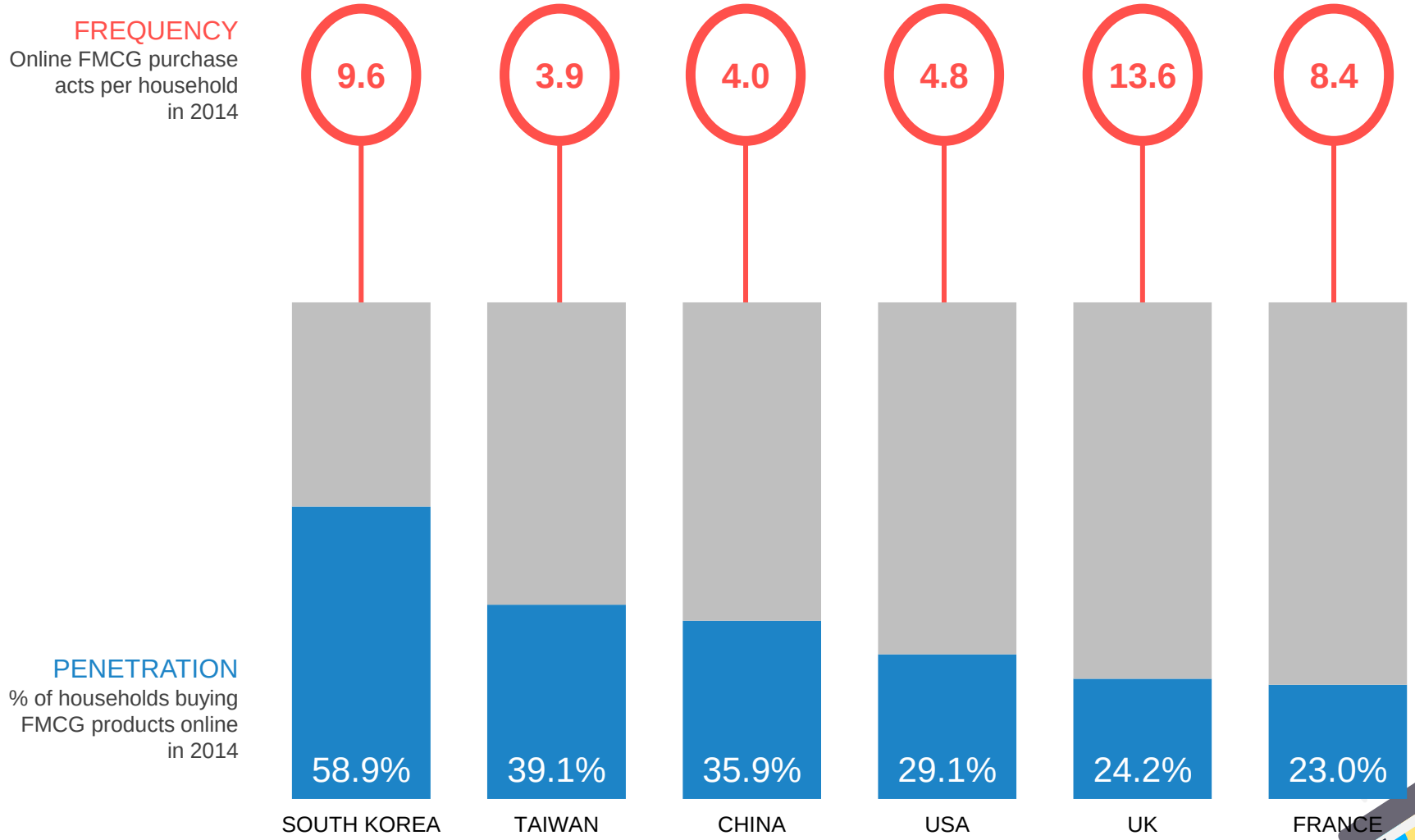
Humanise:

An emotional wrapper is vital, memorable & relatable story

FOR DEEPER CONSUMER CONNECTION

NORTH ASIAN MARKETS, THE MOST ADVANCED IN TERMS OF ECOMMERCE

OVER 35% HOUSEHOLDS BUY FMCG ITEMS ONLINE, AT LEAST FOUR TIMES A YEAR.

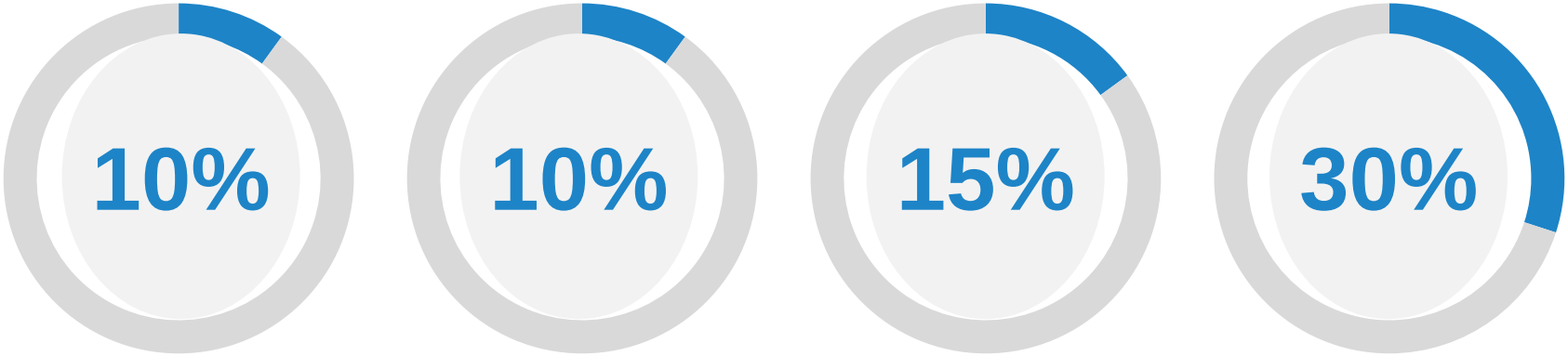


Source: Kantar Worldpanel 2014

2025 ONLINE MARKET SHARE PROJECTION

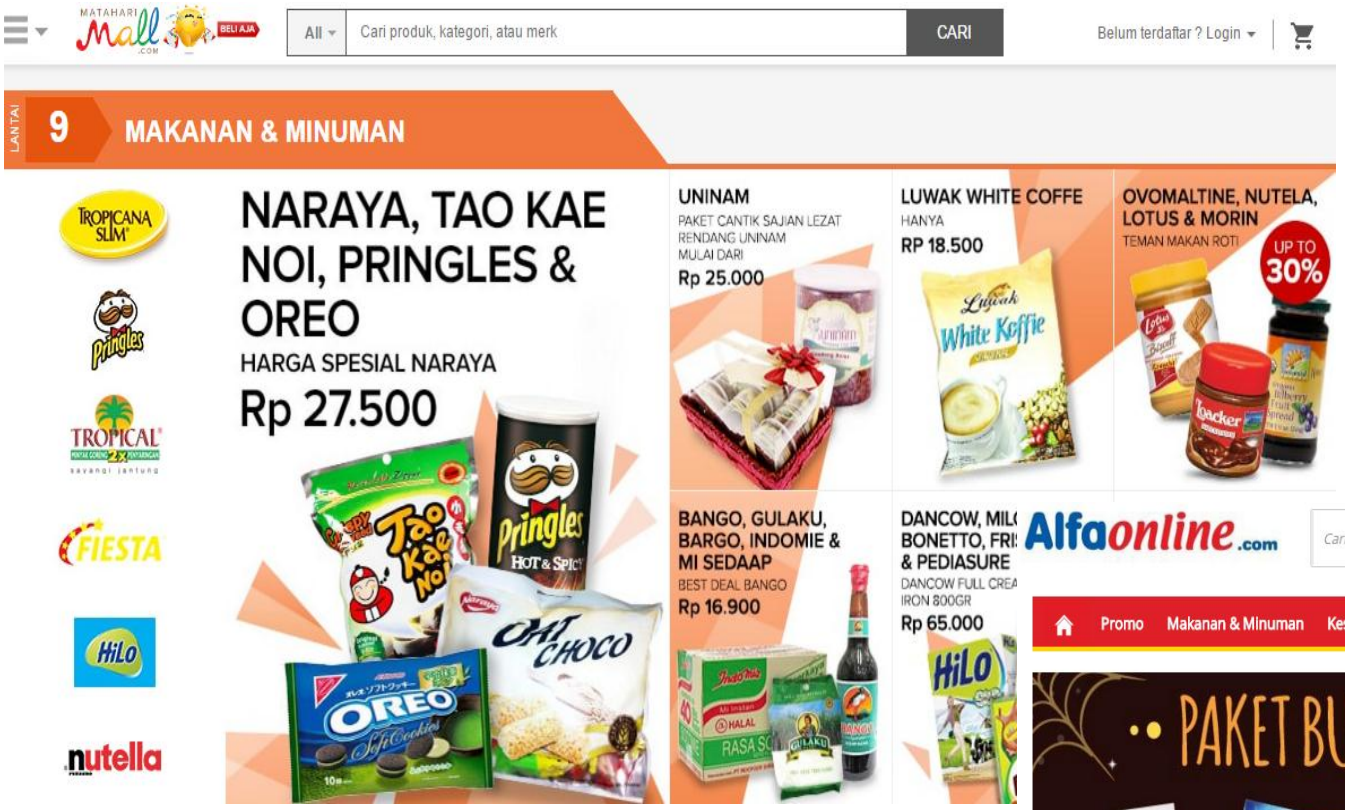
ONLINE'S SHARE OF FMCG WILL DOUBLE IN THE NEXT 10 YEARS

KANTAR WORLDPANEL ESTIMATES ONLINE PURCHASING WILL REACH 30% IN SOUTH KOREA, 15% IN CHINA



In Indonesia, Digital is already part of DNA of some brands

Tech/ecomm Companies booming in Indonesia



GO JEK

traveloka

#5
DATA-LED INTUITION

So I leave with you

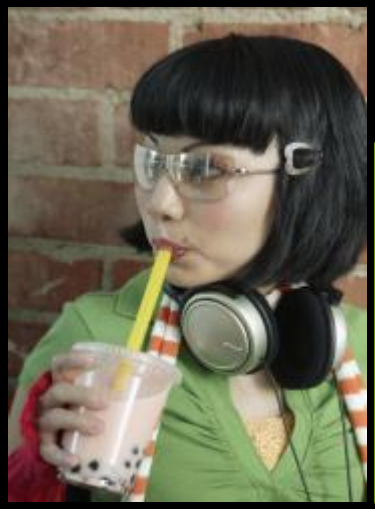
At the end of this presentation

Indonesia is an amazing place for your growth ambitions

THE 5 ‘POWER LEVERS’

THAT ARE
CHANGING THE GAME

#1
MASTERS OF METAMORPHOSIS



#2
BUILD THE NATION, BUILD THE BRAND

#3
WORLD-CLASS INNOVATION WITH A LOCAL TWIST

#4
DIGITISE AND HUMANISE

#5
DATA-LED INTUITION

MASTER ASIAN BRAND MANIFESTO

CHECK LIST

ASIA BRAND POWER

#1
BE WILLING TO CHANGE AND ADAPT, AND NOT AFRAID TO FAIL.

#2
DEMOCRATISE YOUR CATEGORIES

#3
PURPOSE IS POWER.

#4
HELP PEOPLE MODERNISE, WITHOUT ABANDONING THE PAST

#5
INNOVATE AT LIGHTNING SPEED.

#6
USE DIGITAL FOR CREATIVELY INTERACTIVE COMMUNICATION.

#7
STUDY CONSUMERS TO SHED LIGHT ON THE FUTURE.

#8
AN 'EMOTIONAL WRAPPER' IS VITAL.

#9
NEVER COMPROMISE ON QUALITY.

#10
INVEST IN THE FUTURE.

ROADMAP FOR GROWTH

THANKS!

KANTAR WORLDPANEL

CONSUMER CONNECTION 2015

CONSUMER CONNECTION 2015

KANTAR WORLDPANEL'S CLIENT DAY

but first…

HELLO !!

Nadya Ardianti aka Naya

Insight Director at Kantar Worldpanel

used to be:
sales person
digital evangelist

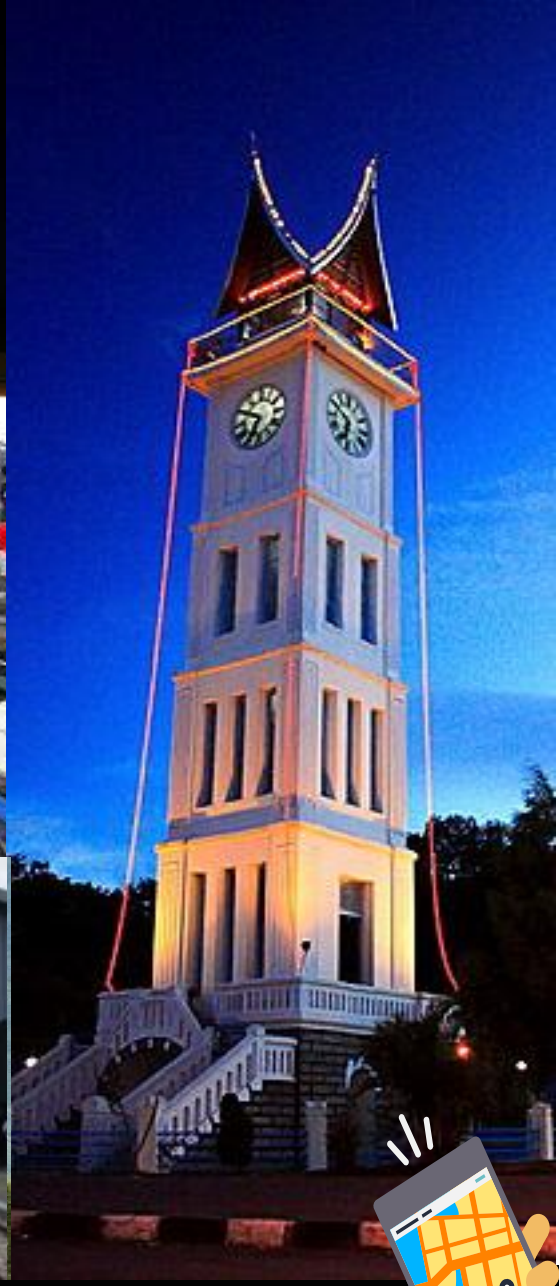
always be:
storyteller
data cruncher
certified diver

I am always be my daddy's girl....

KEEP CALM

I'm

moving schools



KANTAR WORLDPANEL

CONSUMER CONNECTION X 2015

ROADMAP FOR GROWTH

ROADMAP FOR GROWTH

WINNING IN CHANGING ENVIRONMENT

Nadya Ardianti
Insight Director – Kantar Worldpanel Indonesia

new headlines for Indonesia

World Bank: Expect Economic Growth to Rebound Next Year

Industries | Fri Oct 2, 2015 5:43am EDT

Related: FINANCIALS

Indonesian consumers turn pessimistic on economy in Sept - c.bank

ASIAN ECONOMY

Indonesia's Economy Has Stopped Emerging

Peter Kohli

Emerging Markets: Indonesia's Sagging Economy

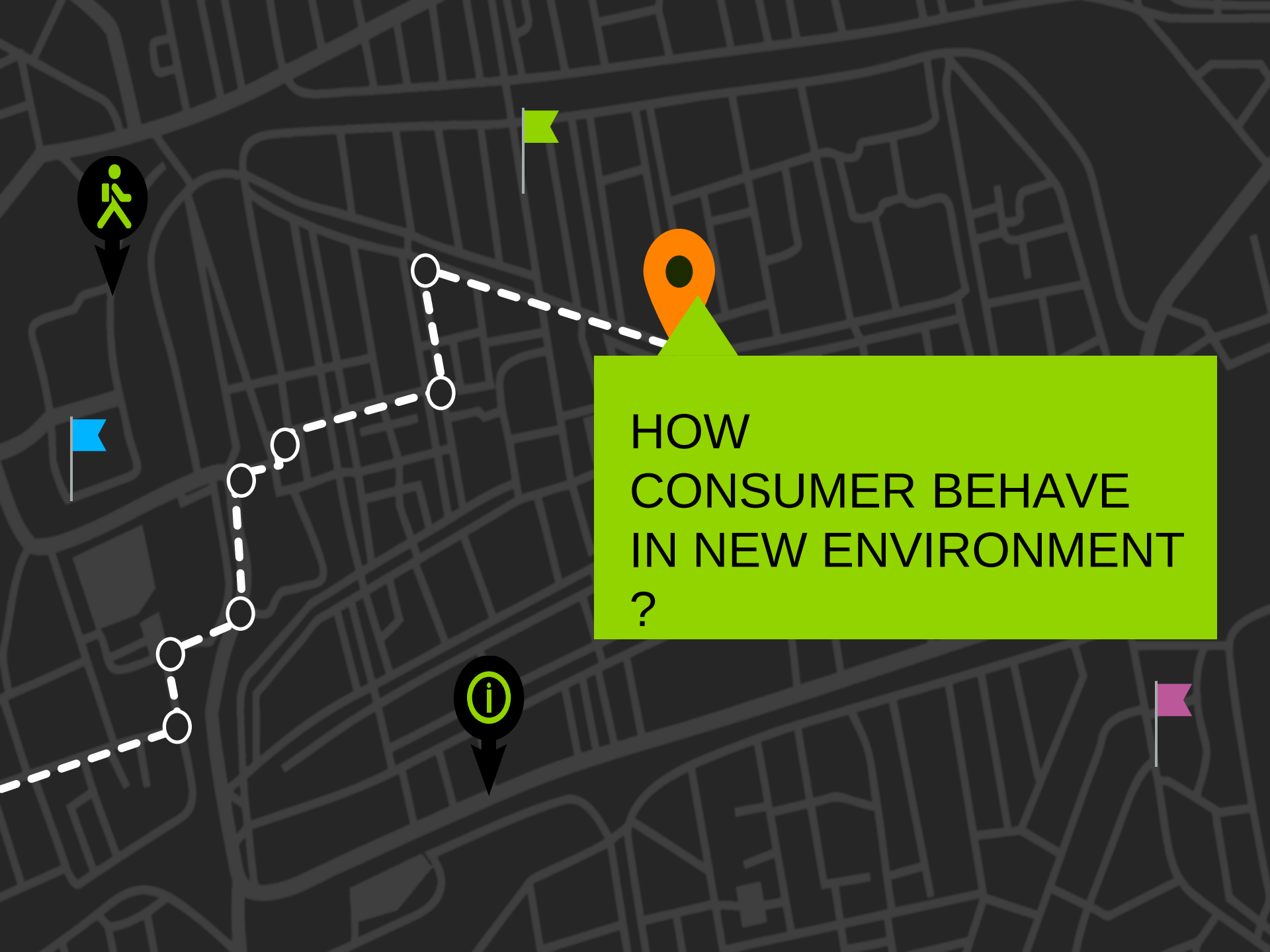
By Peter Kohli, September 16, 2015, 08:57:33 AM EDT

AAA

Vote up | Comment | Share | Subscribe

One of my favorite long term investment targets is Indonesia, even though for the past year their economy has been underperforming. GDP growth has decreased to 4.67%

Analysis: Indonesian economy: Tough times ahead


HOW
CONSUMER BEHAVE
IN NEW ENVIRONMENT
?

reduction in number of categories bought

shoppers are thinking harder about every item they put in their basket

MAT Sept. 2014

48

 # FMCG Categories Bought in A Year

>

MAT Sept. 2015

46

 # FMCG Categories Bought in A Year

KWP FMCG – 111 Categories
National Indonesia

greater focus on necessities

consumption of less necessities category reduced as household cash flow is tightening

MAT Sept. 2014 vs. 2013

28%

 # FMCG Categories Reduced Consumption

<

MAT Sept. 2015 vs. 2014

60%

 # FMCG Categories Reduced Consumption

KWP FMCG – 111 Categories
National Indonesia

shift to upsizing has slowed

fewer categories recorded increased contribution of larger pack size

MAT Sept. 2014

53

% FMCG Categories With Upsizing Trend

>

MAT Sept. 2015

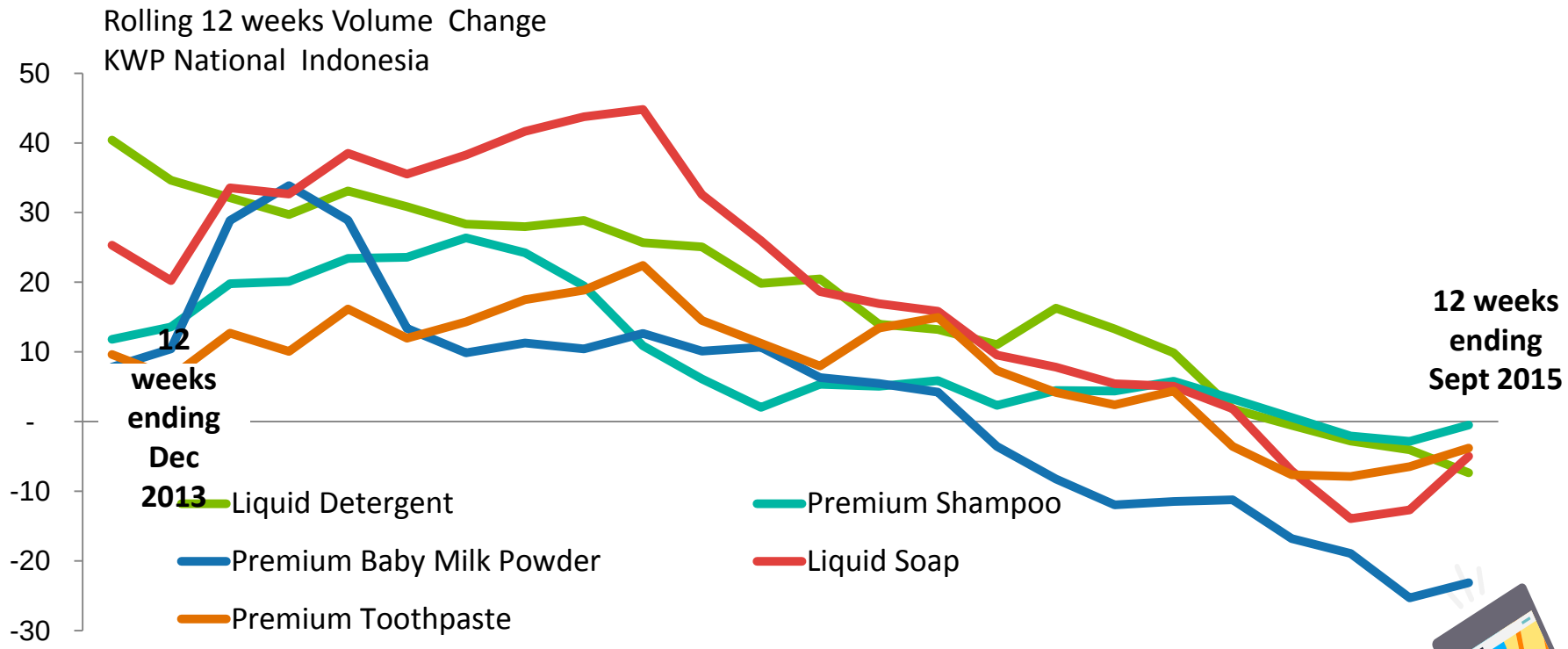
41

% FMCG Categories with Upsizing Trend

KWP FMCG – 111 Categories
National Indonesia

declining trend of premium growth rates

negative growth marked since Q2 2015 and earlier for baby milk powder



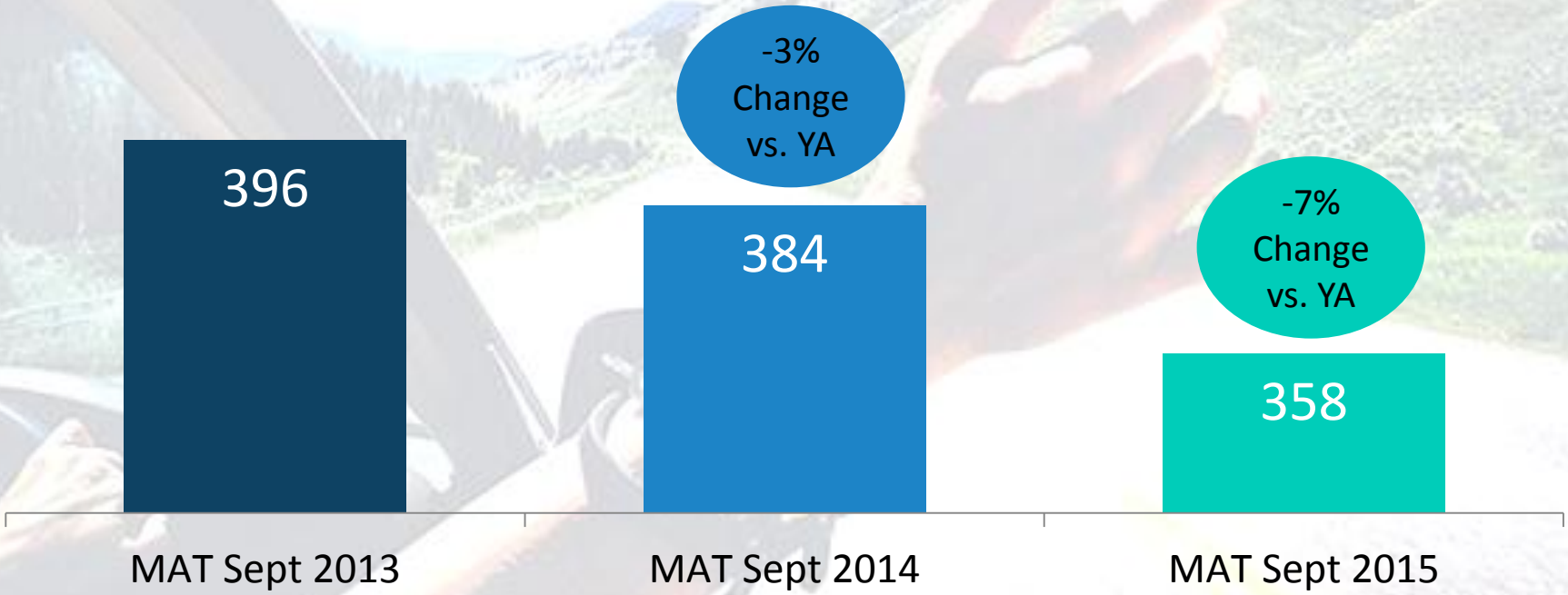
“upward spend on promotion continues

consumer looking for more “value for money” offering

% of occasion where shopper felt they bought in promotion
KWP National Indonesia – Modern Trade

“less frequent shopping trip

from more than one time a day to less than one time a day

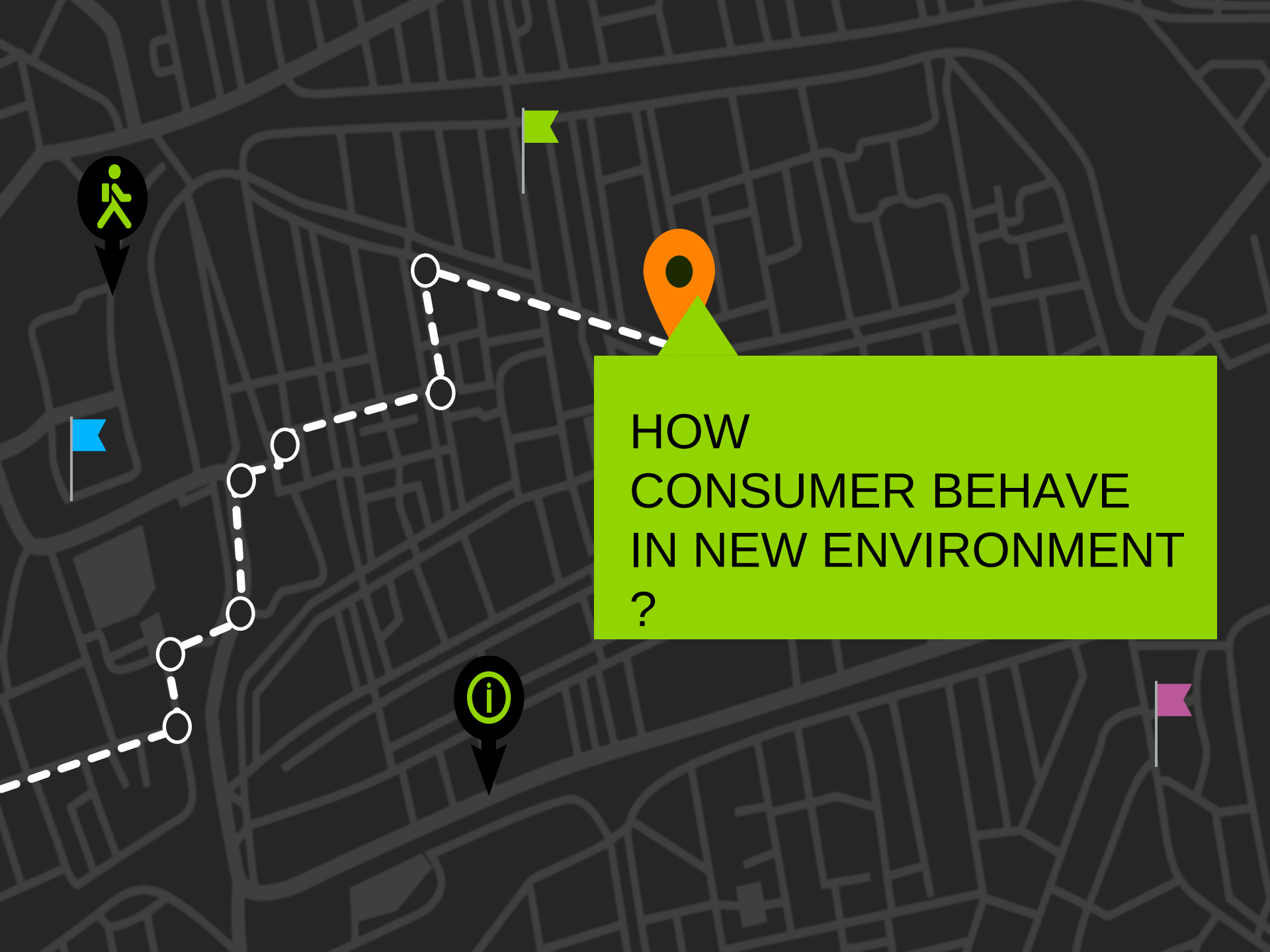


Number of Shopping Trip A Year
KWP FMCG – National Indonesia

impact on trade channel is diverse

modern channel losing buyers while traditional channel losing occasion

	PENETRATION	# OF SHOPPING TRIP
HYPERMARKET	↓	→
SUPERMARKET	↓	→
MINIMARKET	↓	→
TRADITIONAL TRADE	→	↓


HOW
CONSUMER BEHAVE
IN NEW ENVIRONMENT
?

decrease consumption of less necessity category

reduce # of FMCG categories bought

decrease shopping trip

preference to bigger pack size has slowed

demand for premium product has slowed

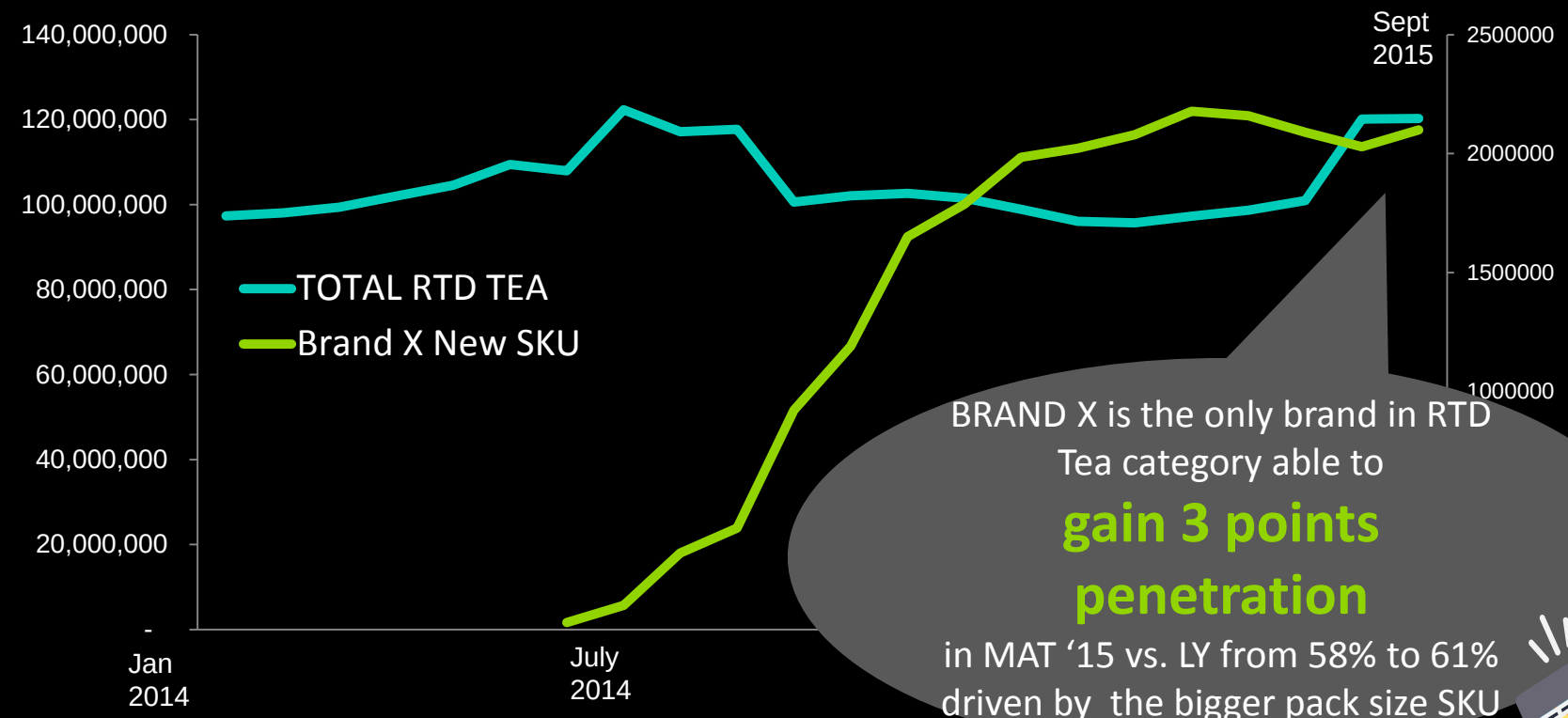
increase spending for promotional items

HOW TO WIN
IN CHANGING ENVIRONMENT
?

SOME INSPIRATIONS…..

Brand X (RTD Tea, previously known for their affordable SKU) launched bigger pack in Q2 2014 during the time when FMCG market is slowing down – against the norm to focus on small pack size offering in the difficult time.

National Indonesia | In Home | 12 weeks Volume Trend



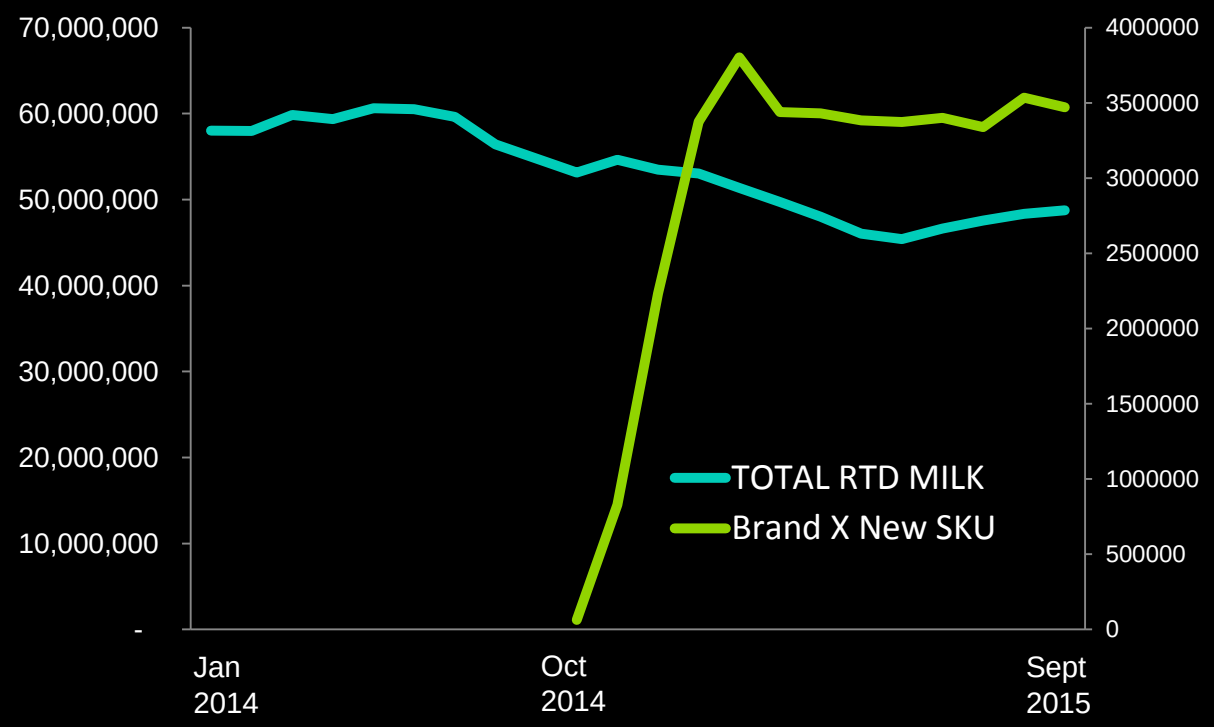
BRAND X is the only brand in RTD Tea category able to

gain 3 points penetration

in MAT '15 vs. LY from 58% to 61% driven by the bigger pack size SKU

Brand X launch new SKUs in RTD Milk using newly popular cartoon character in their packaging , the launching was in Q3 2014 with heavy ATL support and in store activation

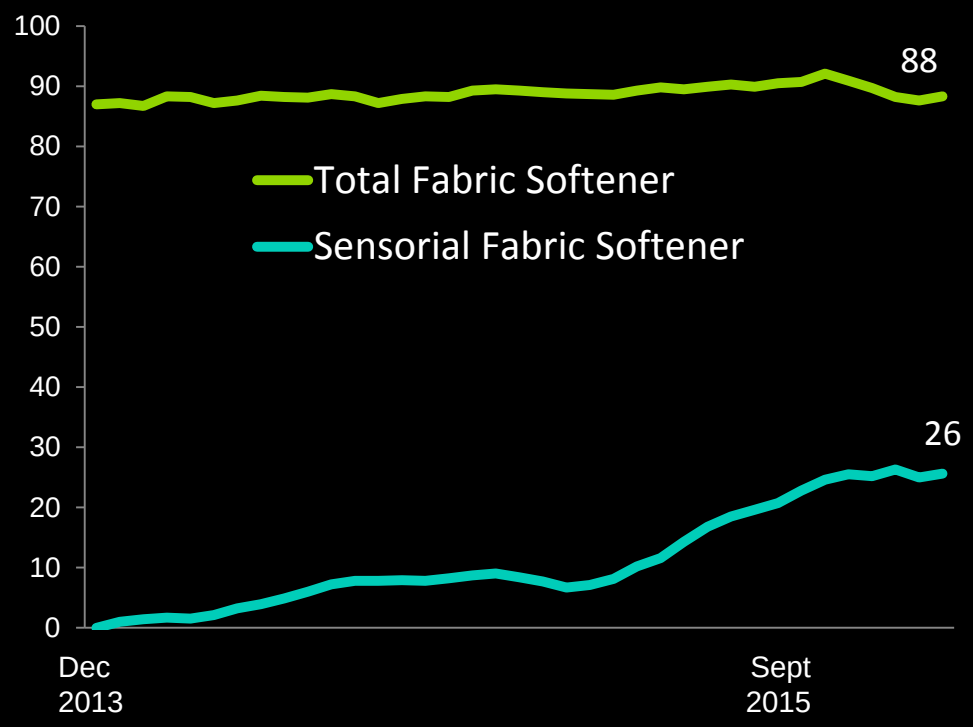
National Indonesia | In Home | 12 weeks Volume Trend

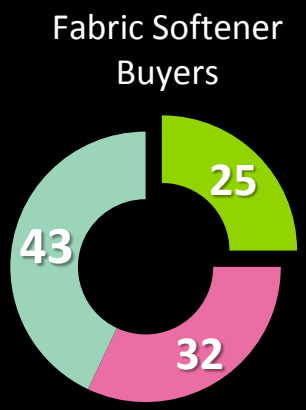


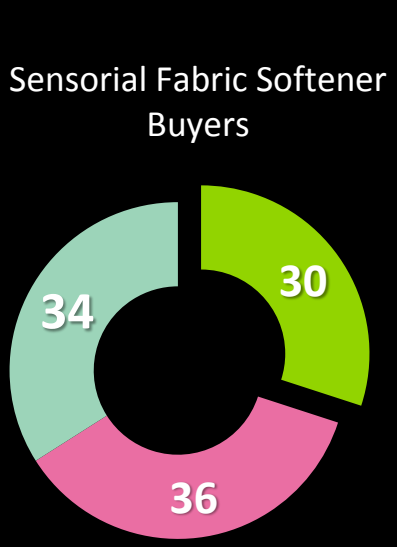
BRAND X new SKU able to bring **++ 3,3 million new buyers** to the master brand and half of the new buyers are exclusive buyers of the new SKU (do not buy other SKU of the same brand)

Sensorial fabric softener first introduced in Indonesia market at 2013 and ever since, the new innovation keep recruiting buyers and the buyers are more engaged to the category thus help overall category consumption

Urban Indonesia | 12 weeks Penetration Trend

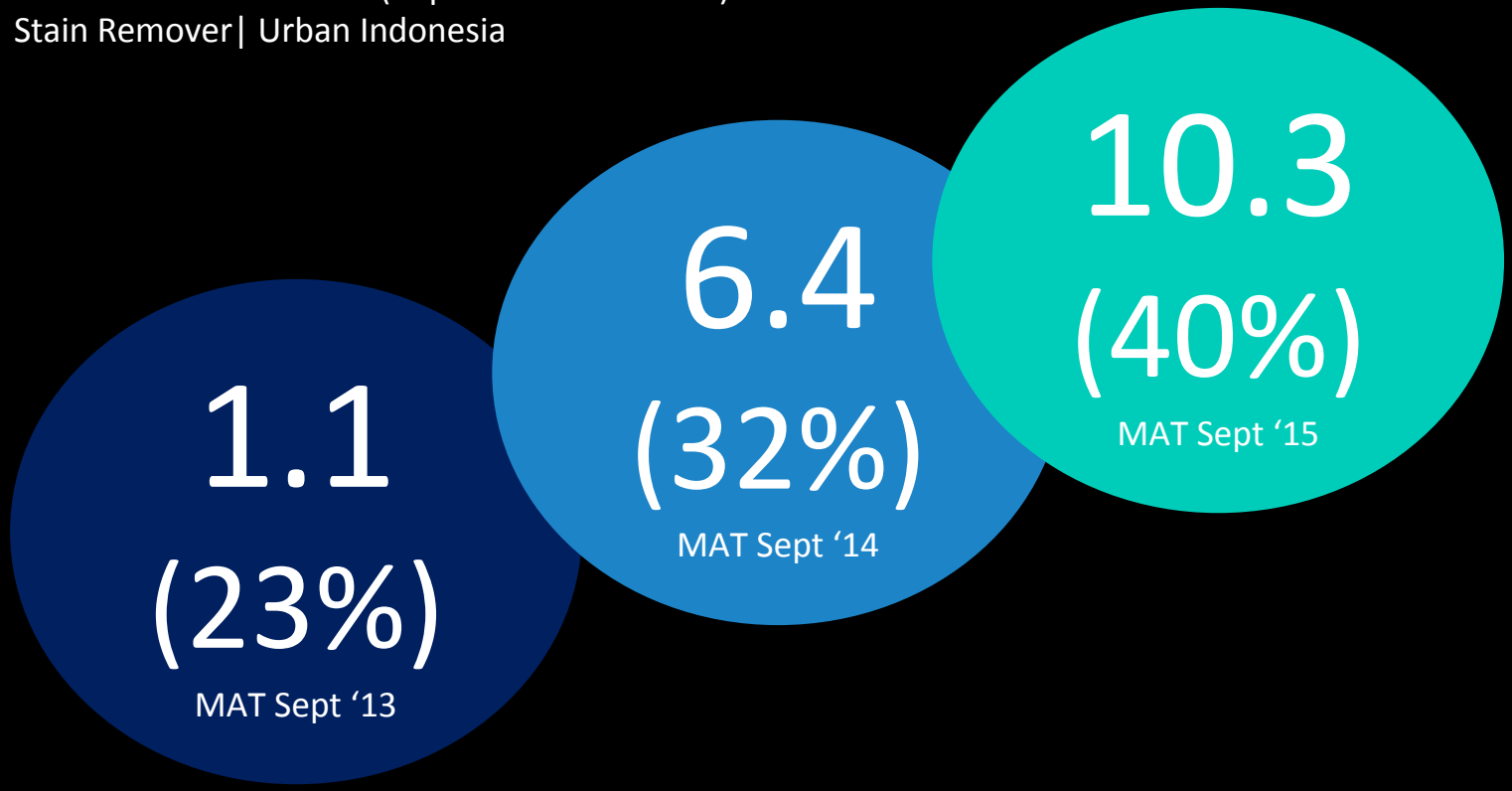




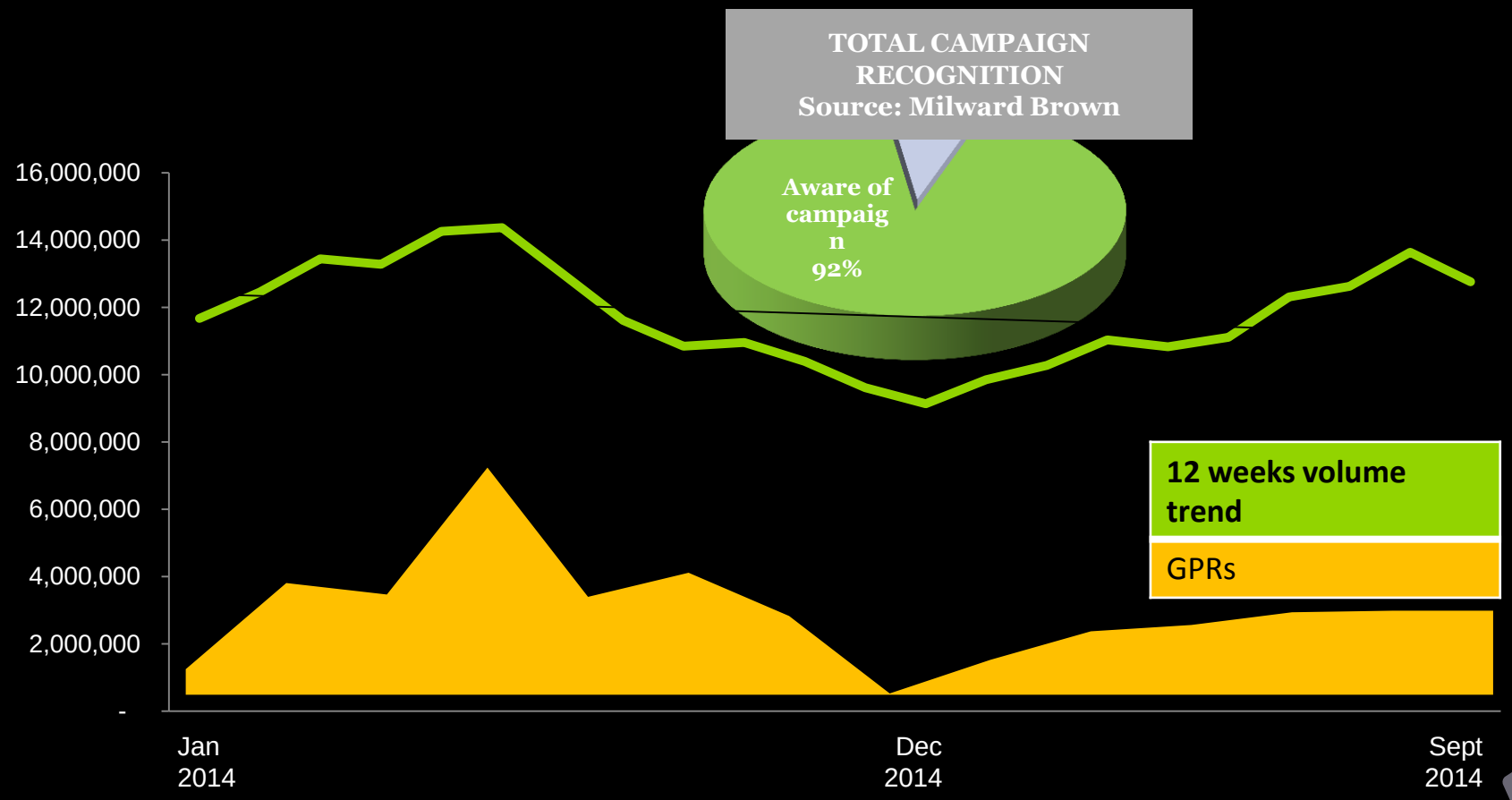


Stain remover, a new innovative home care product in Indonesia continue recruiting buyers and more buyers repeat the purchase indicates strong relevance of this new category

Annual Penetration and (Repeat Purchase Rate)
Stain Remover| Urban Indonesia



Brand X able to bring back the growth in 2015 after experienced declining trend in half year 2014 – memorable and engaging brand campaign with clear message of product benefit is driving relevancy result in improved brand performance and stronger brand equity



HOW TO WIN IN CHANGING ENVIRONMENT ?

5 TIPS TO WINNING…

INNOVATE

New segments will emerge from changes in consumption and shopping behaviors while continue evolving consumers need underpinning the change

RTD Beverages in PET bottle appeal for both consumers looking convenience and value for money

Cold wash detergents for example, appeal to both a value and environmental mindset consumers in Europe

BE PROACTIVE

Think out of the box - the tough times are time to be creative.

Give **more effort** to keep your brand in front of your customers

Re-align your products mix to suit demand; and enhance the offering and attributes with the changes in consumer behavior and needs.

Look for **more opportunities** – other currently non customers , who are not being looked after

STAY CLOSE TO YOUR CONSUMERS

It is important now, more than ever for brand to stay close to their customers especially during the difficult times when customers **redefine value**

Investigate any change on what customers are seeking and how customers behave to redefining value and responding in the hard times.: are they more willing to postpone purchases, trade down, or buy less?

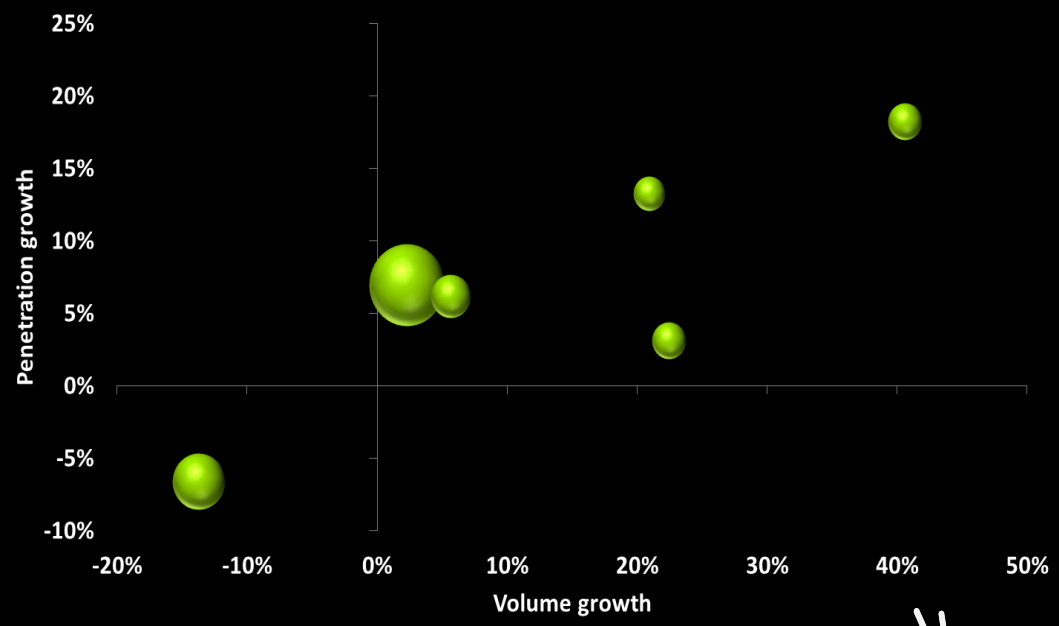
FOCUS ON BUYERS RECRUITMENT

In hard times, brands are in a battle to recruit more buyers and in some cases, survival.

Maintain relevancy is essential - during hard time, non-essentials are hit the hardest – how can you make yourself essential and stay in consumers consideration ?

Price is undoubtedly a major driver of trial but it is not the only one as such **brand equity** plays important role

Looking at the performance of the top 6 IFFO/ GUMP brands in Indonesia in MAT 2015 vs. LY shows the linear correlation between penetration growth and volume growth and this is true across categories and market



START!
1
INNOVATE
2
BE PROACTIVE
3
STAY CLOSER TO YOUR CONSUMERS
4
FOCUS ON BUYERS RECRUITMENT
HOW TO WIN
IN CHANGING ENVIRONMENT
?
5 TIPS TO WIN

BUT MORE IMPORTANT IS TO ...

Stay Positive

ROADMAP FOR GROWTH

THANKS!

CONSUMER CONNECTION 2015

KANTAR WORLDPANEL'S CLIENT DAY

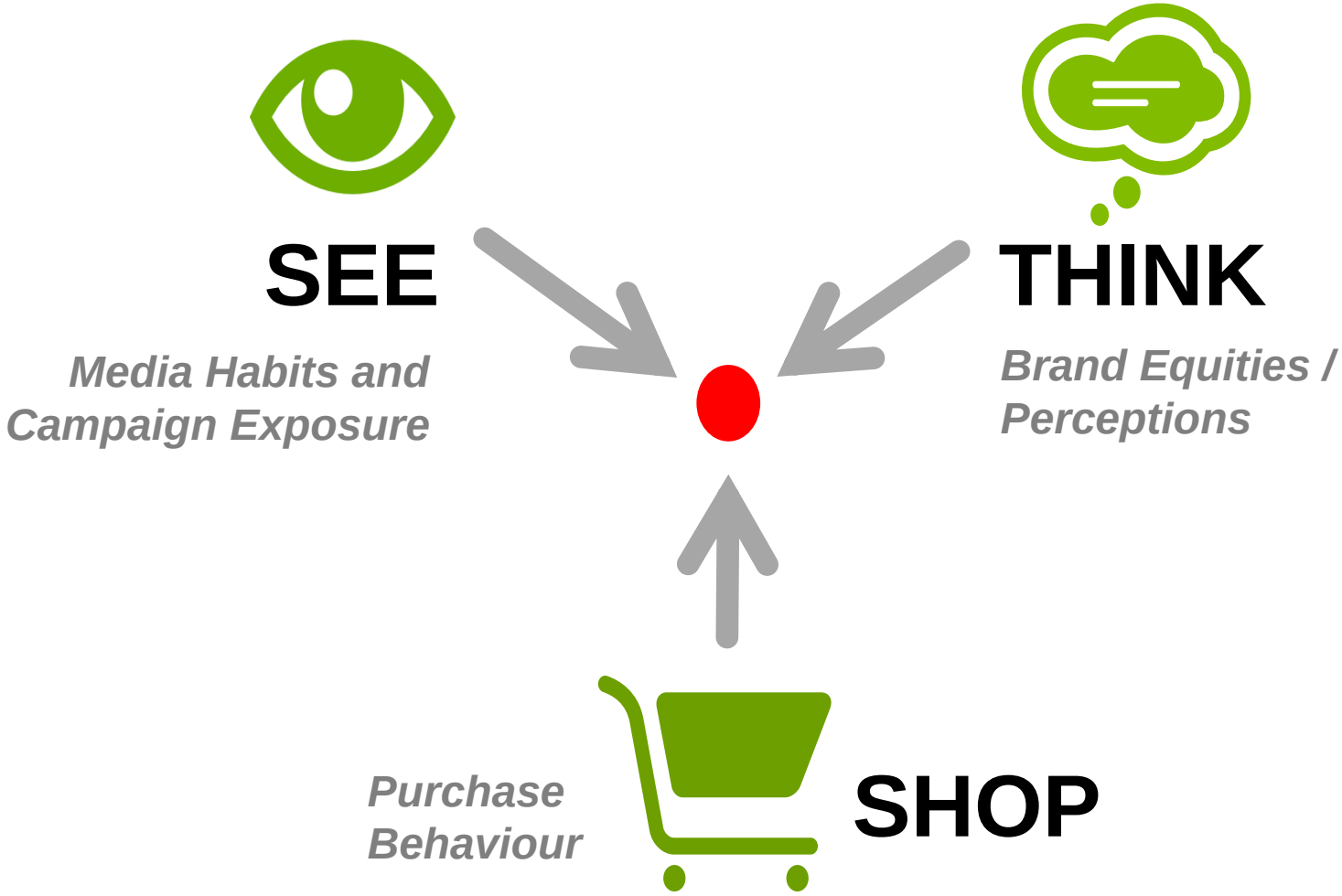
ROADMAP FOR GROWTH

Sustainable Growth

How strong brands stay strong

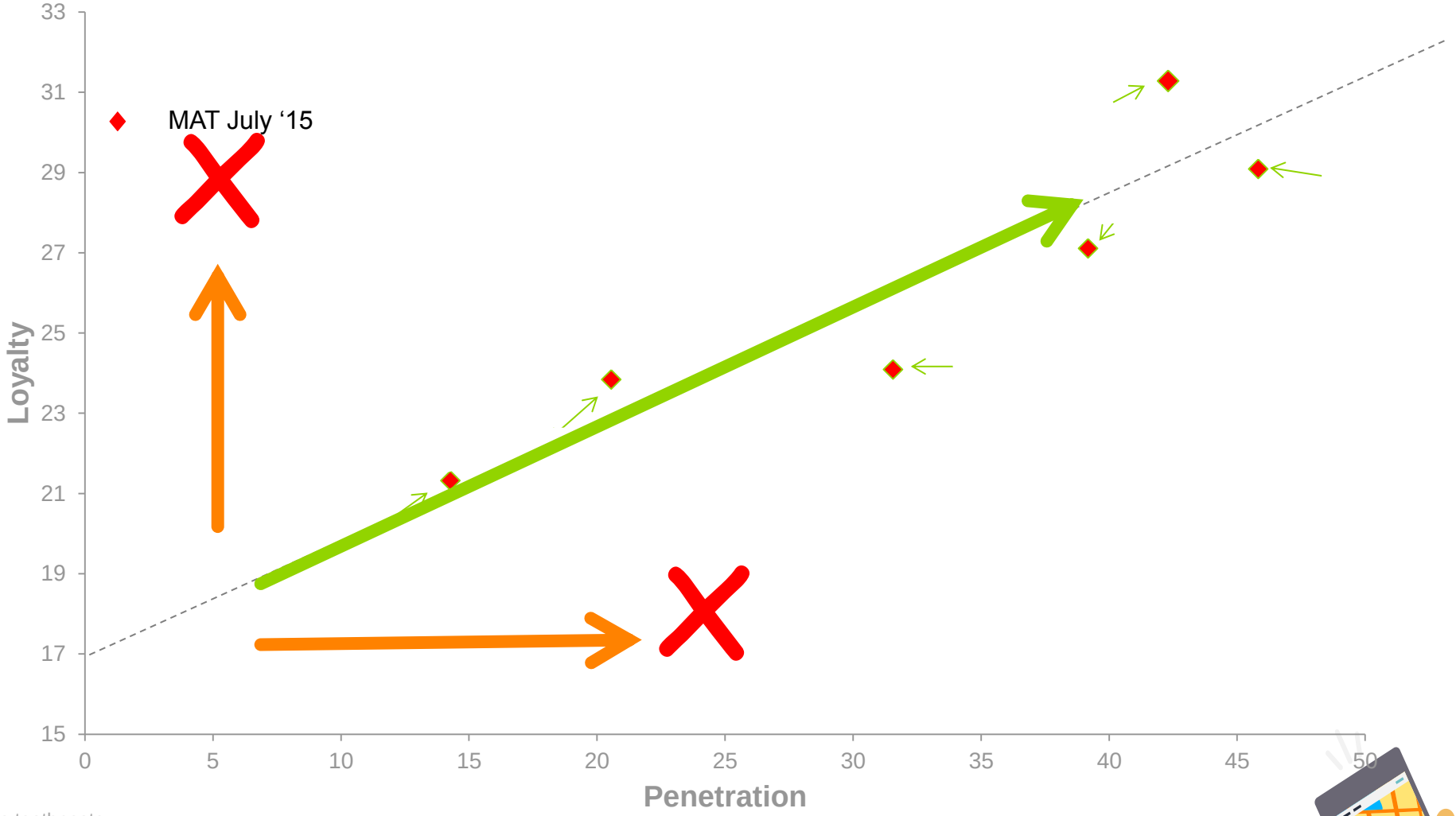
Andrew Ridsdale-Smith
Asia Business Solutions

We create bespoke single-source datasets to help our clients understand how to influence purchase behaviour



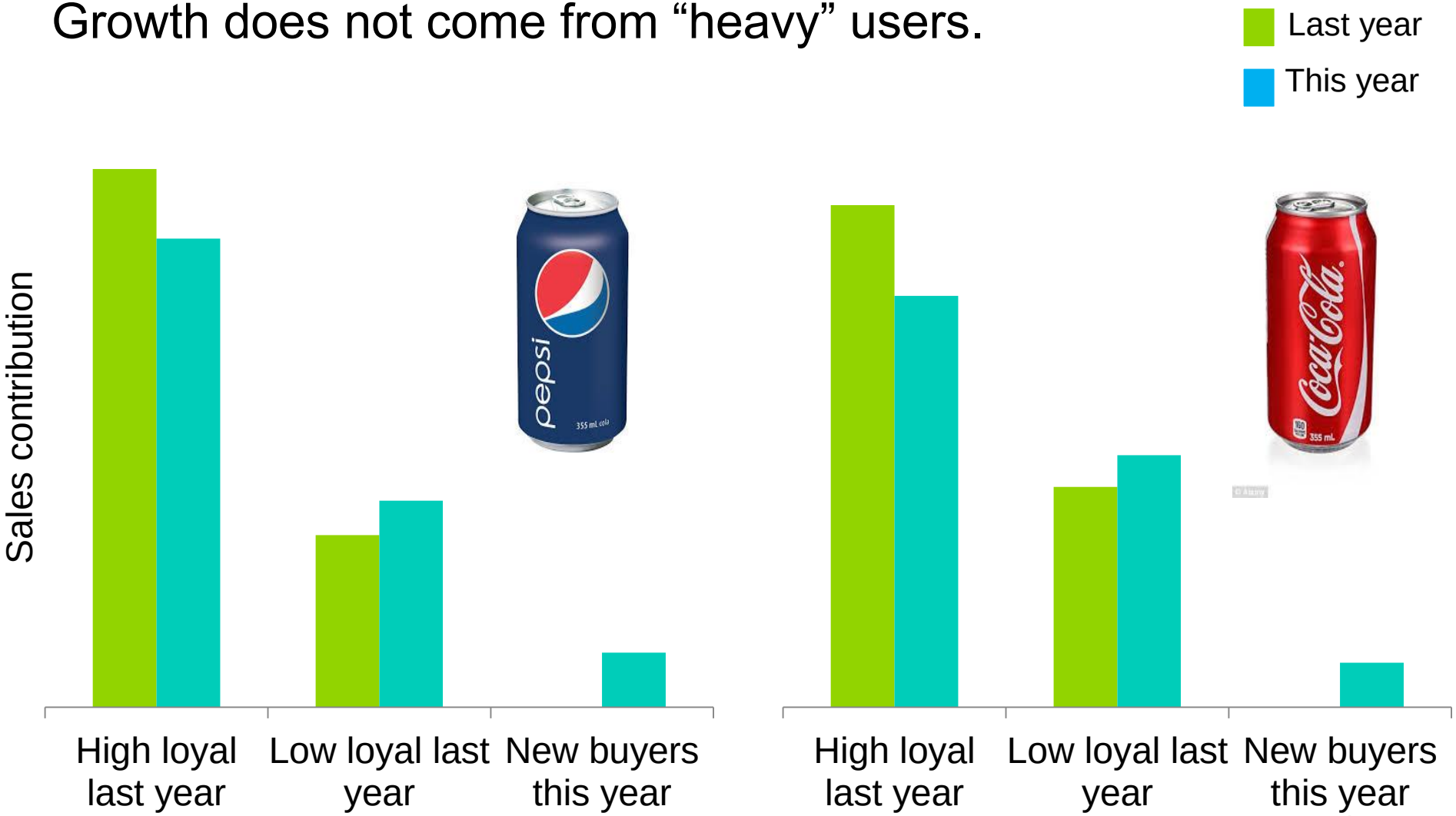
What is Sustainable Growth?

Double Jeopardy law states that brands cannot grow without building a larger buyer base



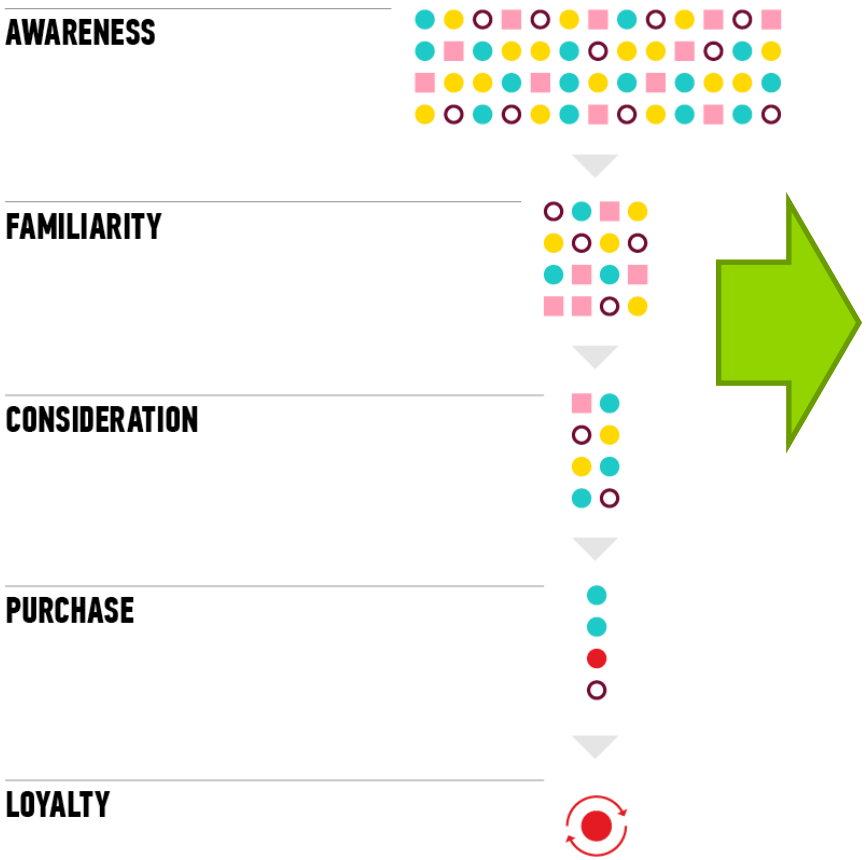
China toothpaste

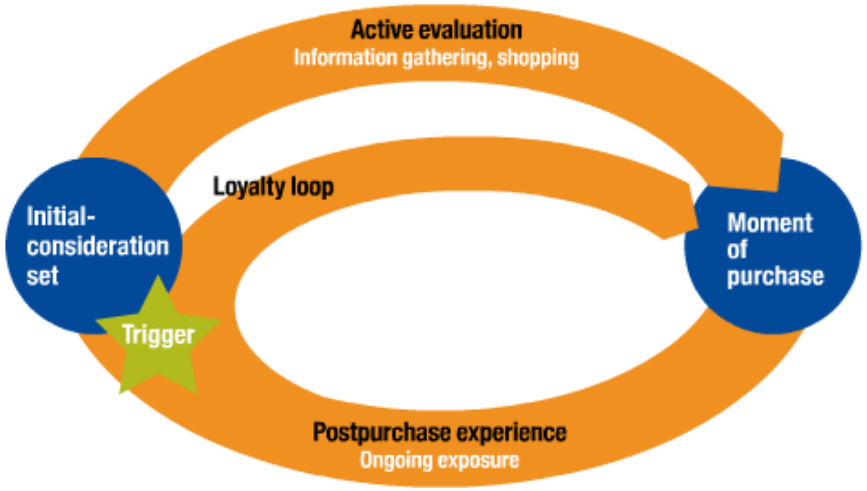
Growth does not come from “heavy” users.



Thailand CSD growth source
Volume sales change: 2013 to 2014

The Path to Purchase is now recognised as being non-liner and that consumers will re-evaluate their preferences after each purchase..

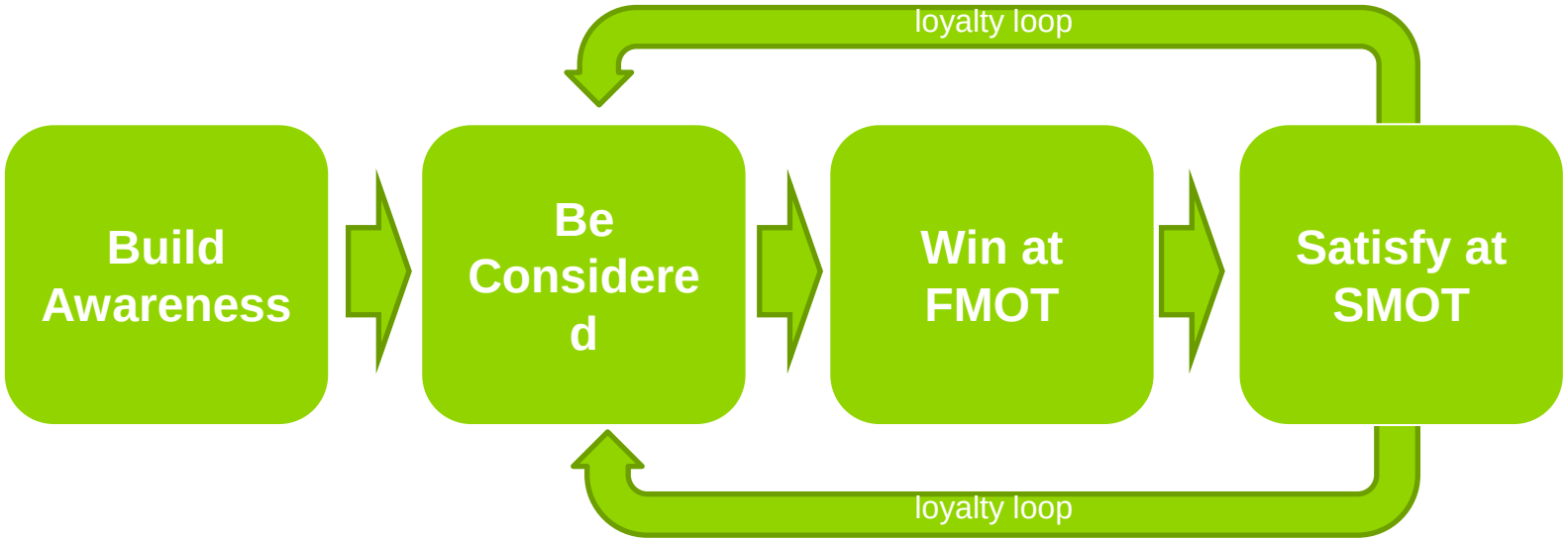




Mind Space

Touchpoints

Imagery

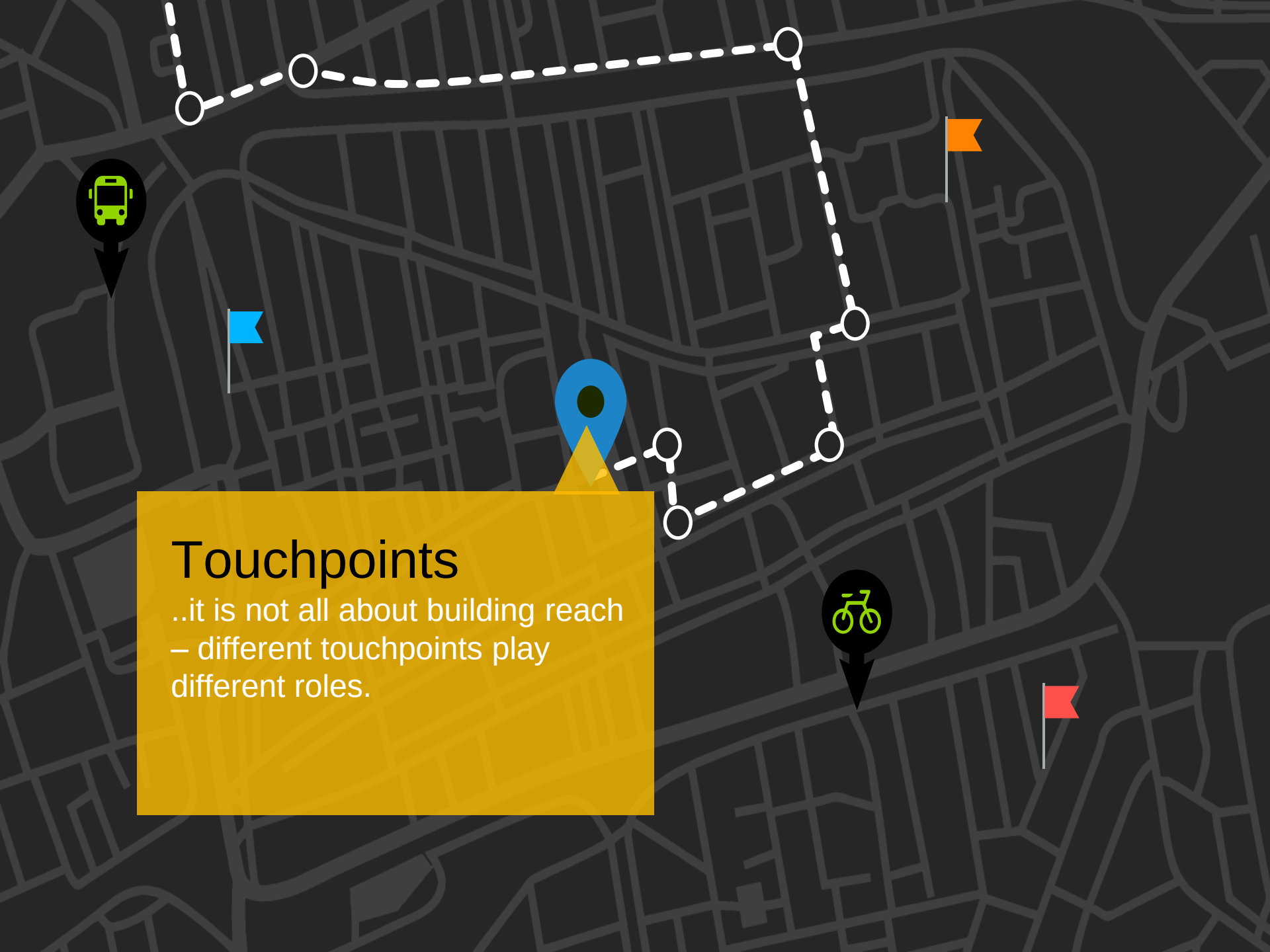


Market Space

Instore

Pack, Price, Place, Promotion

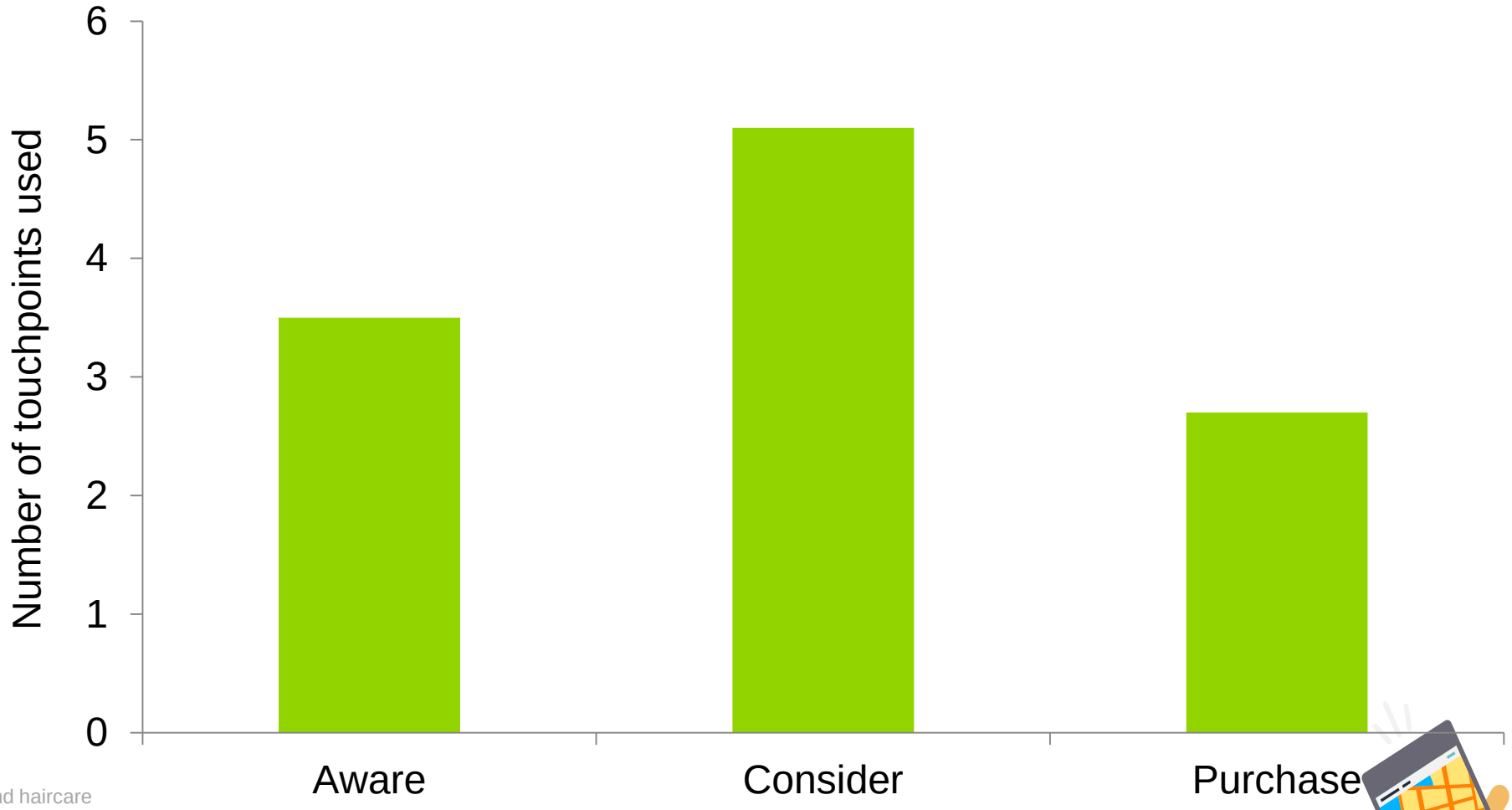
Product



Touchpoints

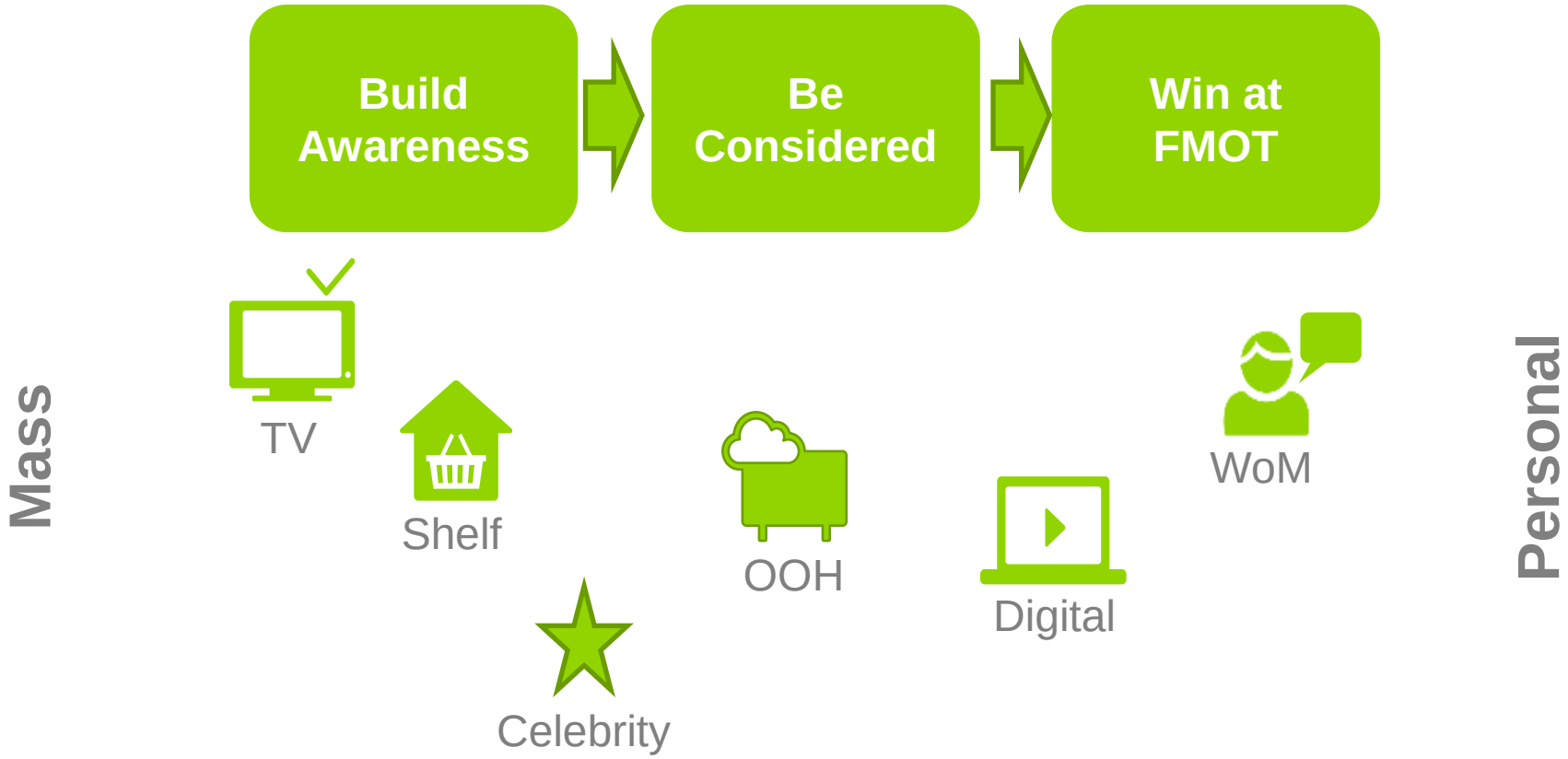
..it is not all about building reach – different touchpoints play different roles.

As people become more aware of a brand they use more information sources to learn about the product. Once Purchase happens this drops to only a few touchpoints that remind them of the brand.

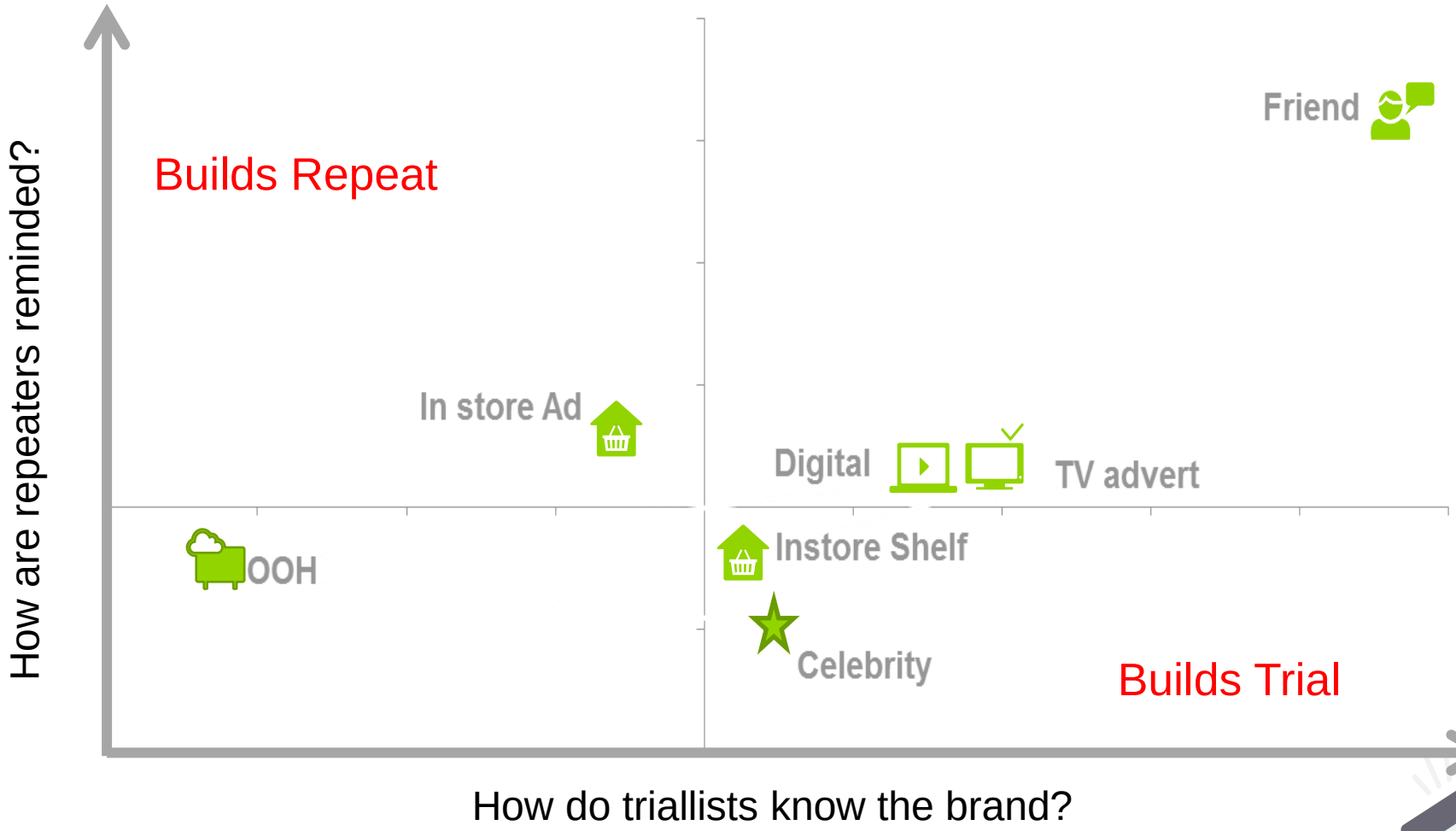


Thailand haircare

Different touchpoints have different roles..



..and can influence behaviour in different ways…

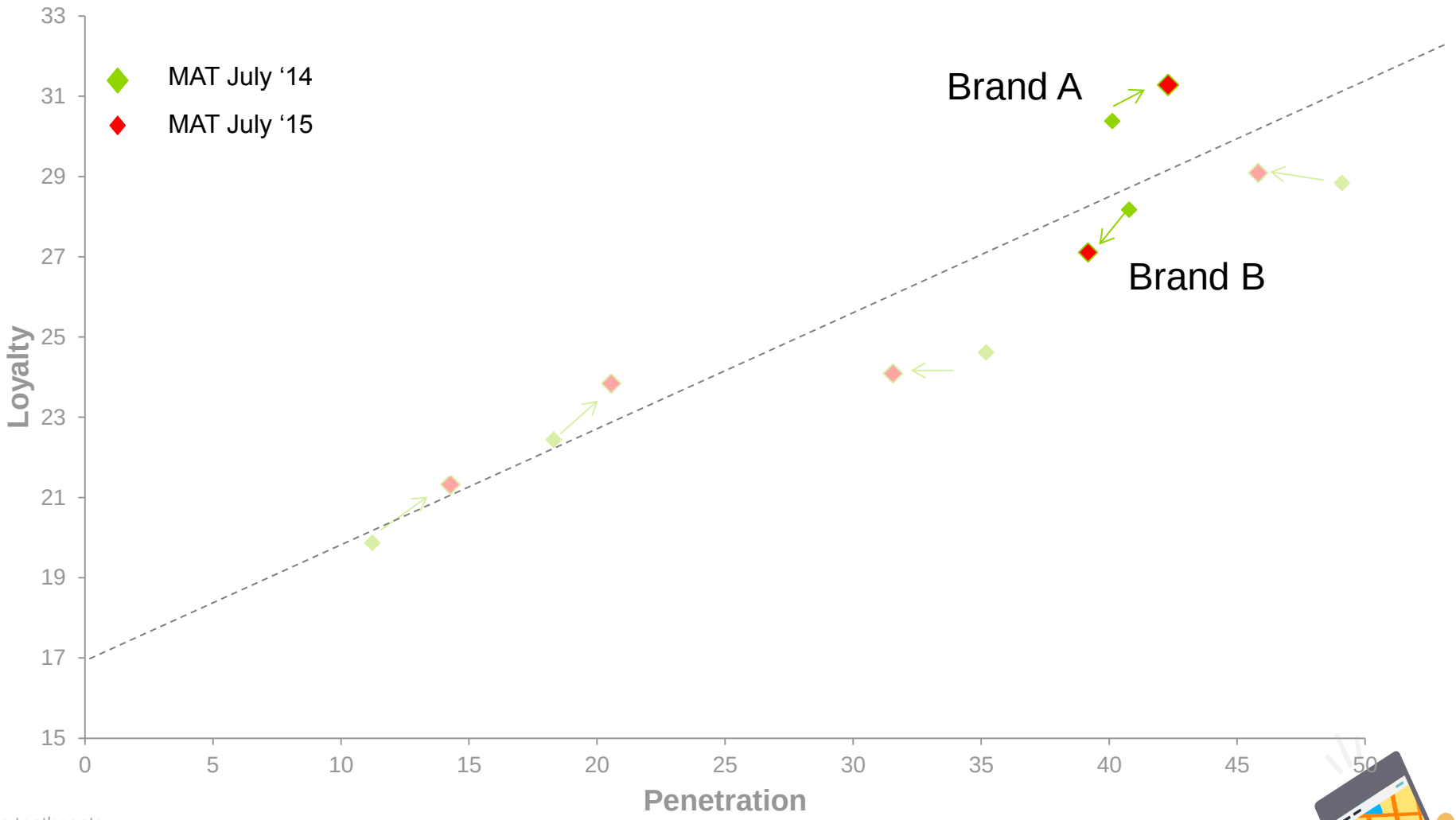


Thailand haircare brand

Message

Consistency and Clarity is key – ensure people try you for the same reason they stay with you

What is different about A and B?



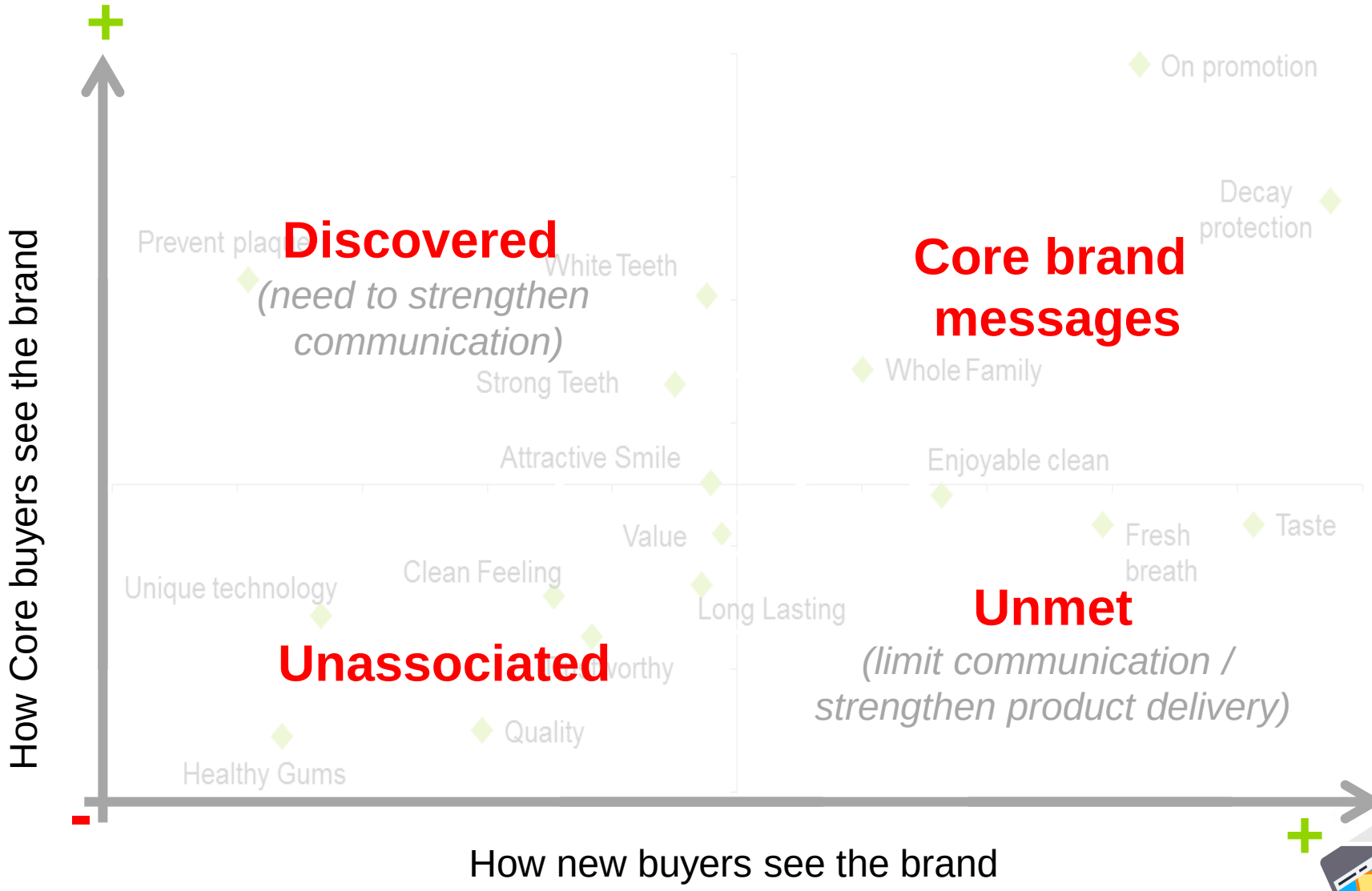
China toothpaste

Brand Perceptions by Triallists and Repeaters – Brand A

China toothpaste

Brand Perceptions by Triallists and Repeaters – Brand B

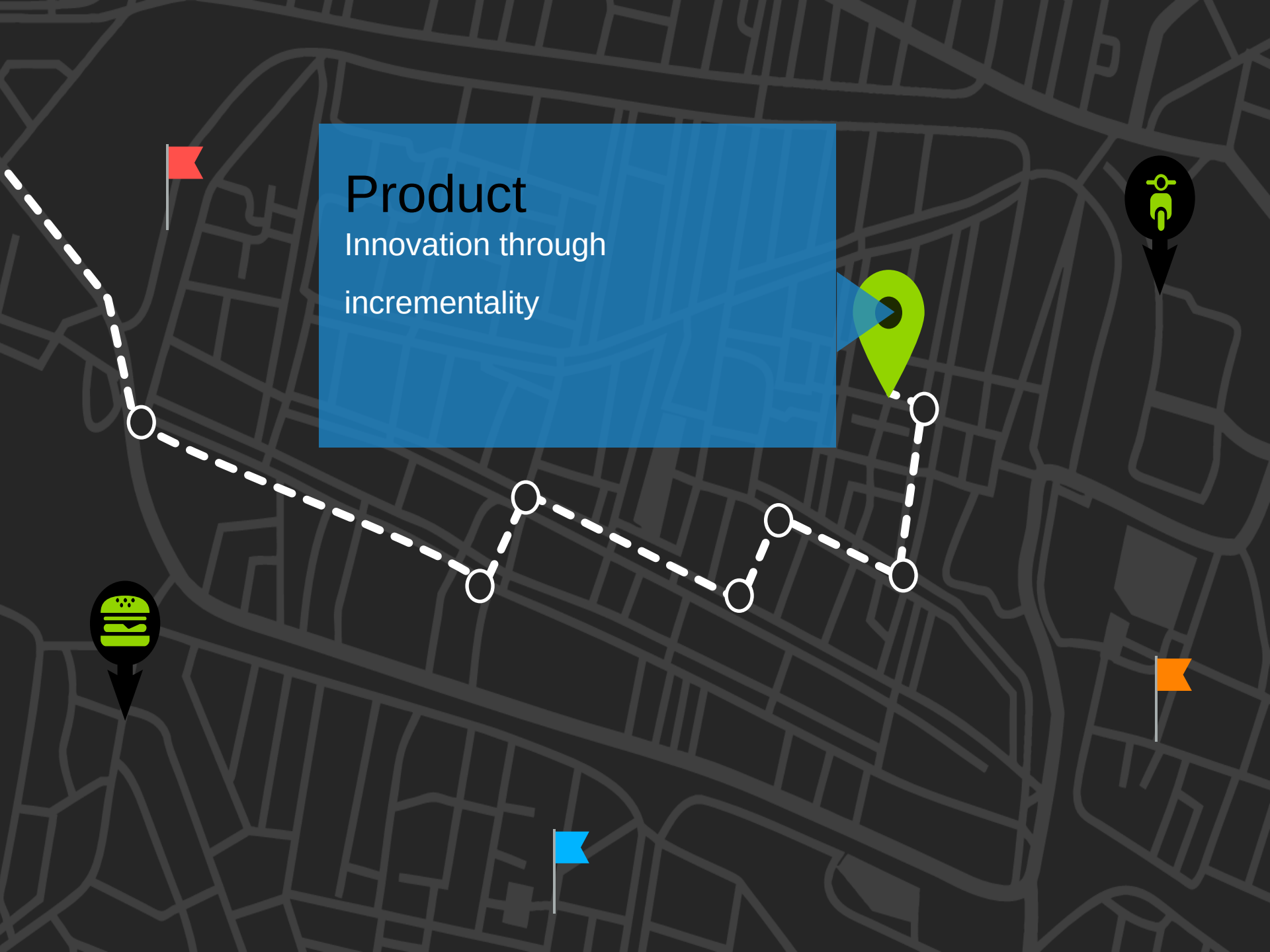
China toothpaste


+
-
How Core buyers see the brand
How new buyers see the brand
+
On promotion
Decay protection
Prevent plaque
White Teeth
Discovered
(need to strengthen communication)
Core brand messages
Whole Family
Strong Teeth
Attractive Smile
Enjoyable clean
Value
Fresh breath
Taste
Clean Feeling
Unique technology
Long Lasting
Unmet
(limit communication / strengthen product delivery)
Unassociated
Quality
Healthy Gums

Product

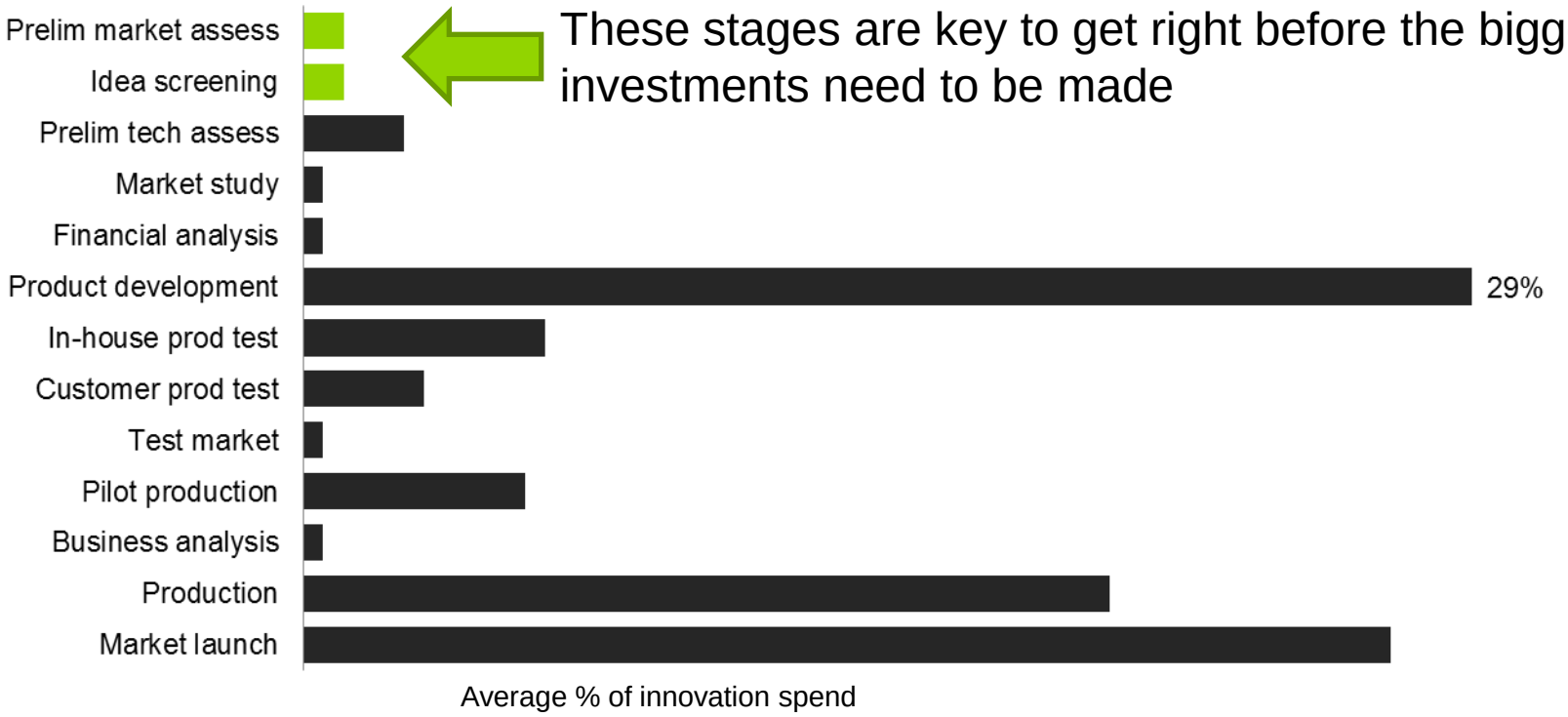
Innovation through

incrementality



Simple investments at the start of the Innovation process can save a lot of time / money later.

Once the decision has been made to invest in product development it is difficult to 'put the brakes on' a project. Source: Cooper & Kleinschmidt

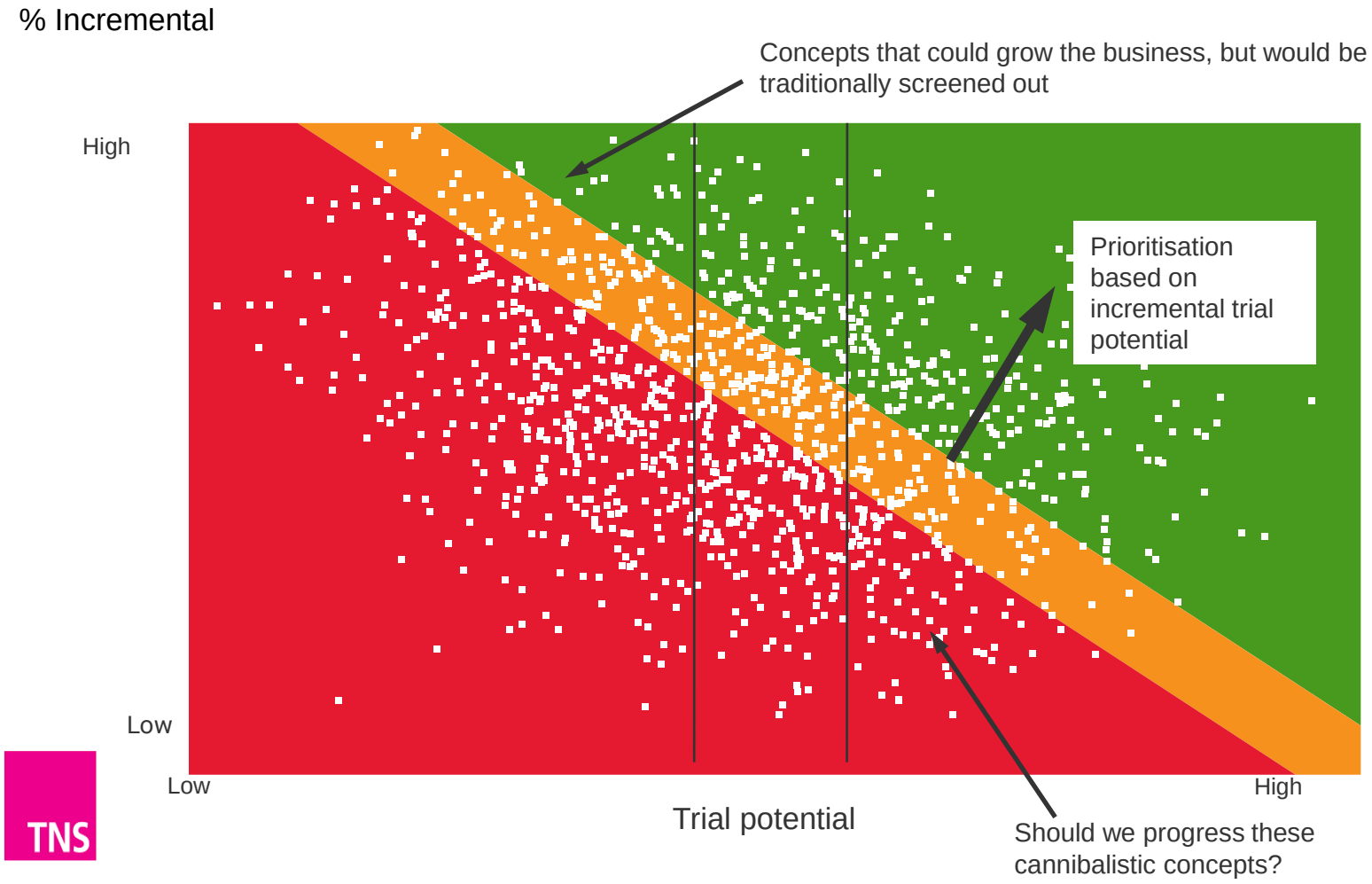


These stages are key to get right before the bigger investments need to be made

Success rates for new launches double if they are able to deliver high incrementality

UK Launch success project: TNS and Kantar Worldpanel

Using a measure of incrementality in concept tests can dramatically change the screening process.

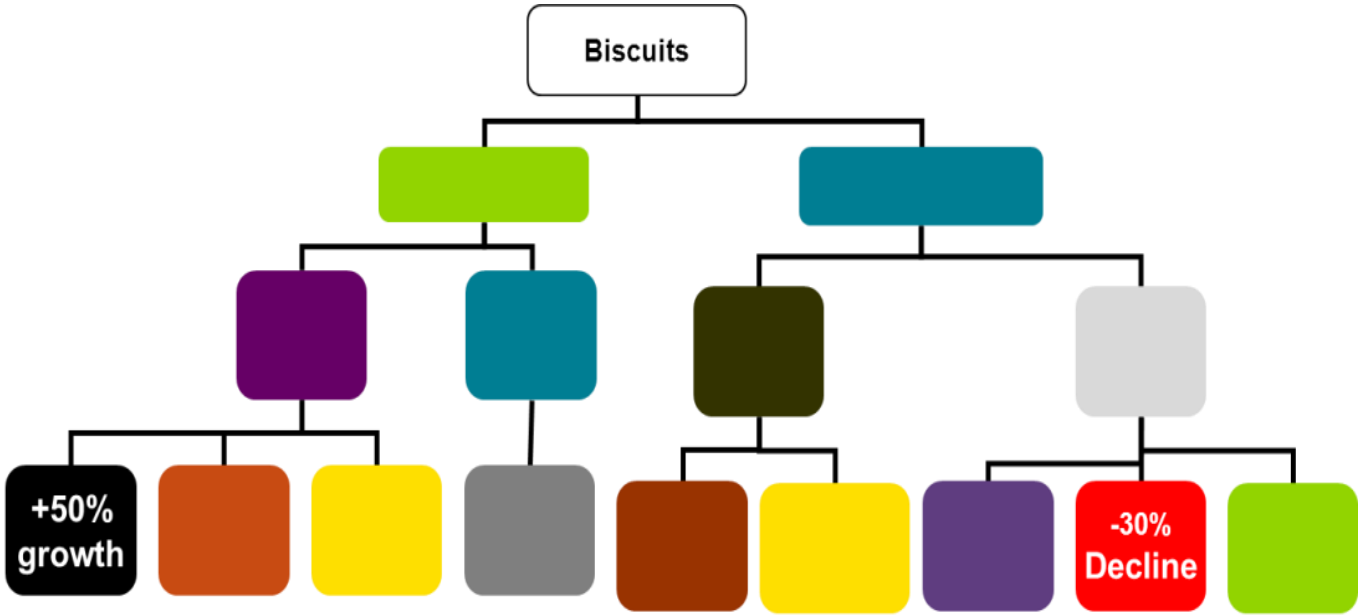


Purchase Decision Hierarchies help identify NPD opportunities

Pack Size

Price Tier

Product groups



Key Thoughts

- Brands in sustainable growth are able to win both trial and convert this to repeat by being retained in the consideration set
- Different Touchpoints play different roles on the P2P
- Clarity of message is important to ensure that people buy and repeat for the same reason.
- Validate innovation opportunities and concept tests by their ability to win new buyers for a brand – not just on pure sales potential.

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THANKS!

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KANTAR WORLDPANEL'S CLIENT DAY

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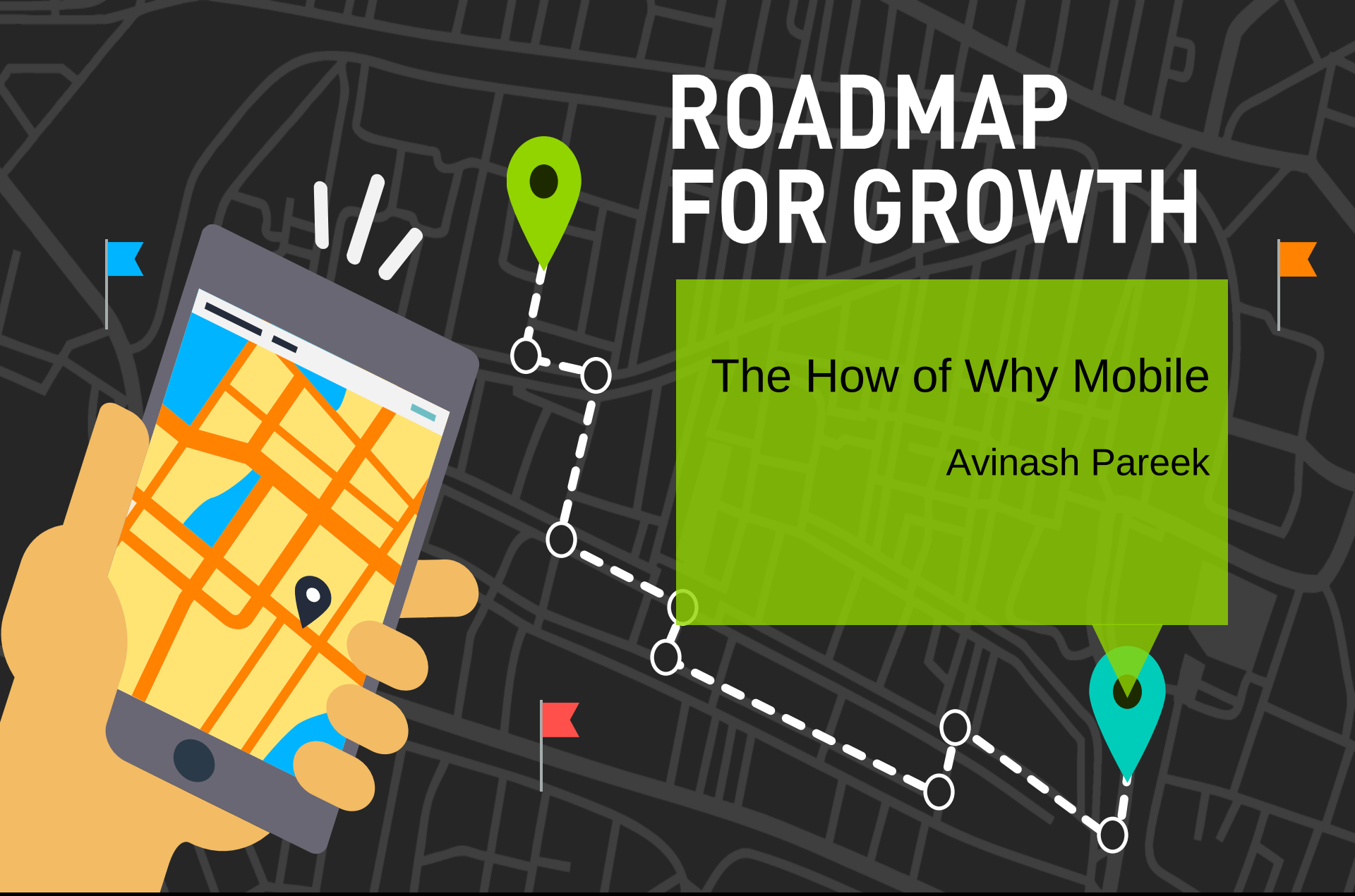
The How of Why Mobile

Avinash Pareek



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Clichés

Mobile is the next big thing

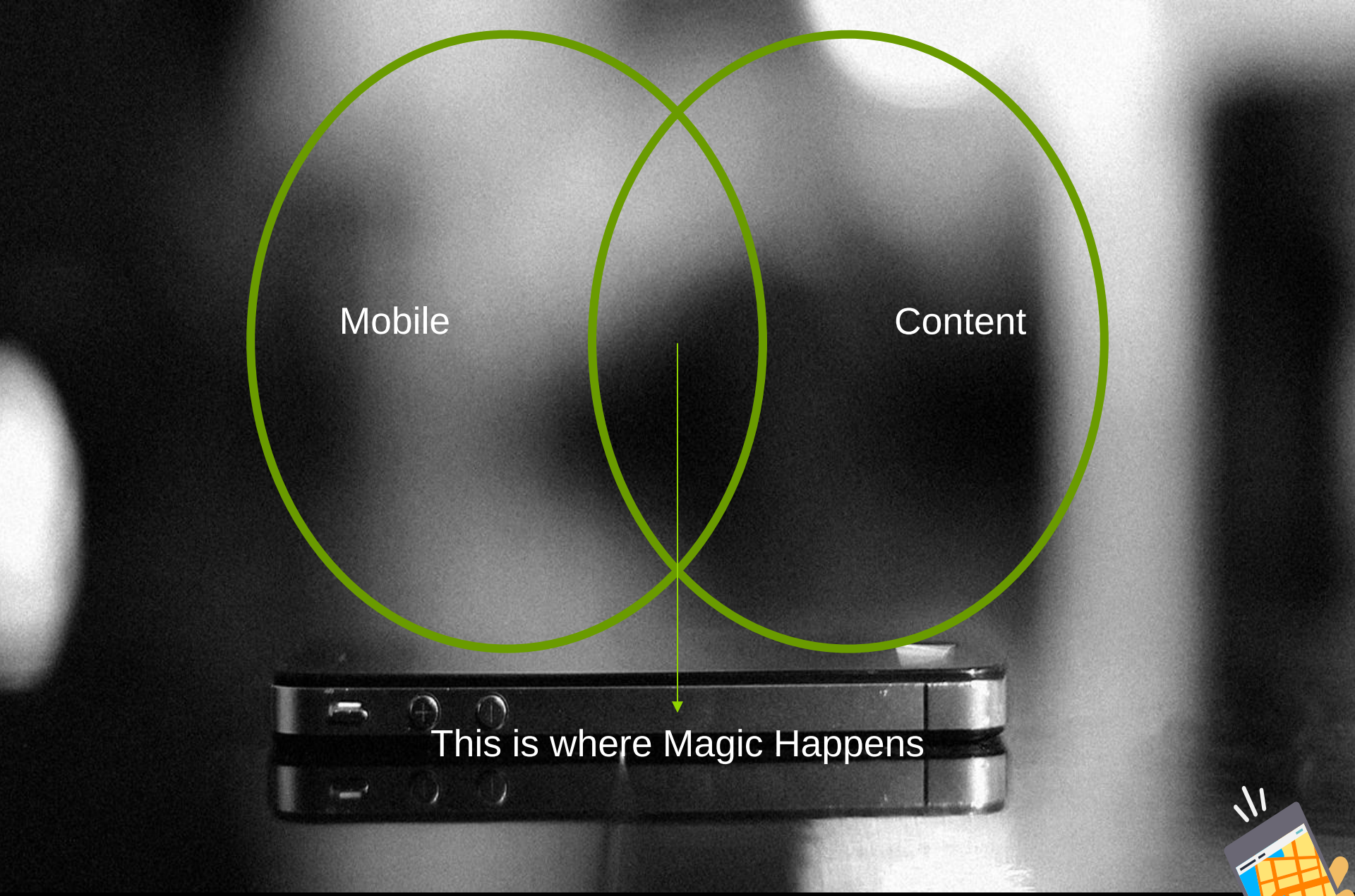
Mobile is the biggest contributor to web traffic

Smartphones are growing exponentially

190

1.2%

Mobile
Gap


Mobile
Content
This is where Magic Happens

The route to mobile success lies in great content

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400h+

90bn+

500bn+

Share of Attention

TVC
Marketing Milky Way

Media Mix

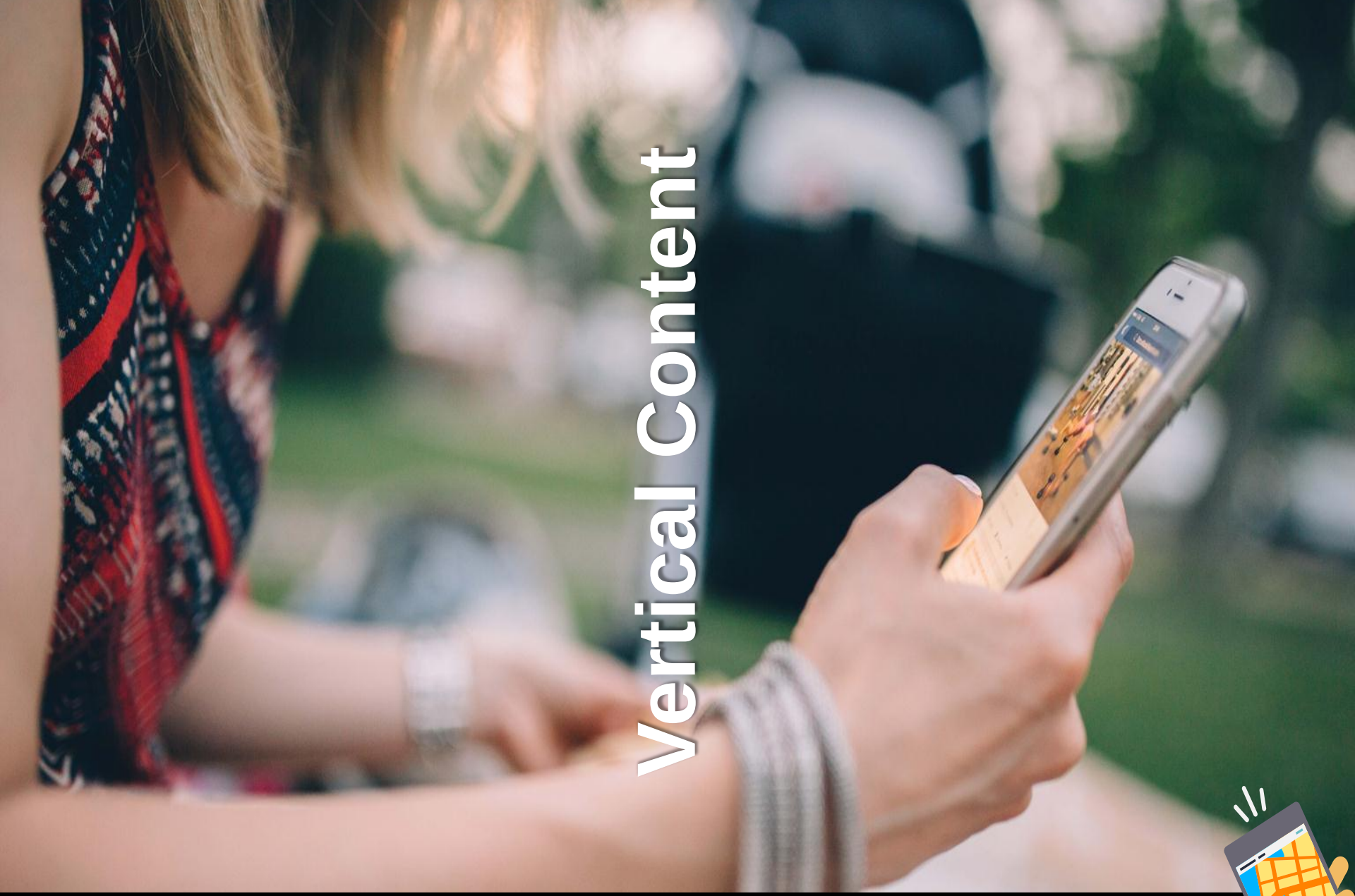
Content Mix

1. Exclusive

Simply download the Shazam app, tune into Fear the Walking Dead this Sunday at 9/8c on AMC and watch for your cue to listen with the app and you'll be experiencing fear on a whole new level.

2. Convenient

Vertical Content



9X

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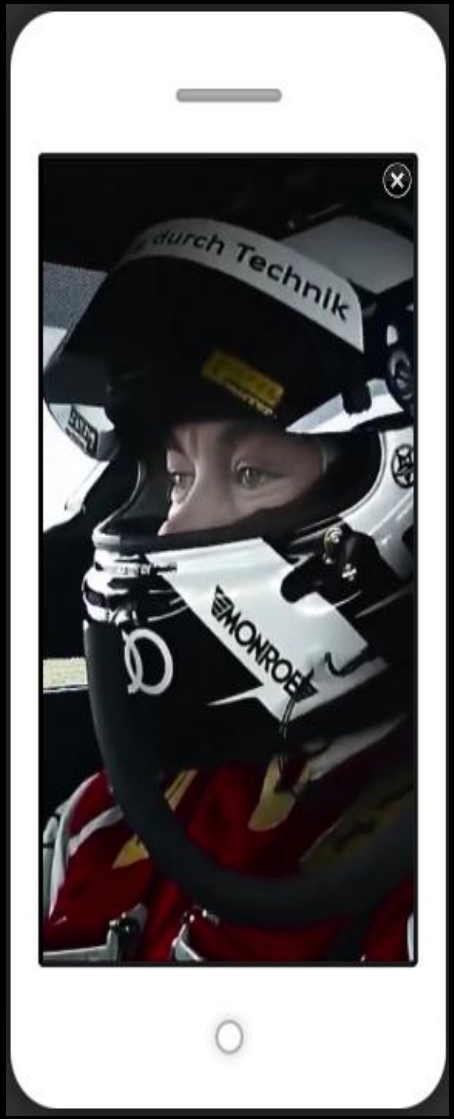
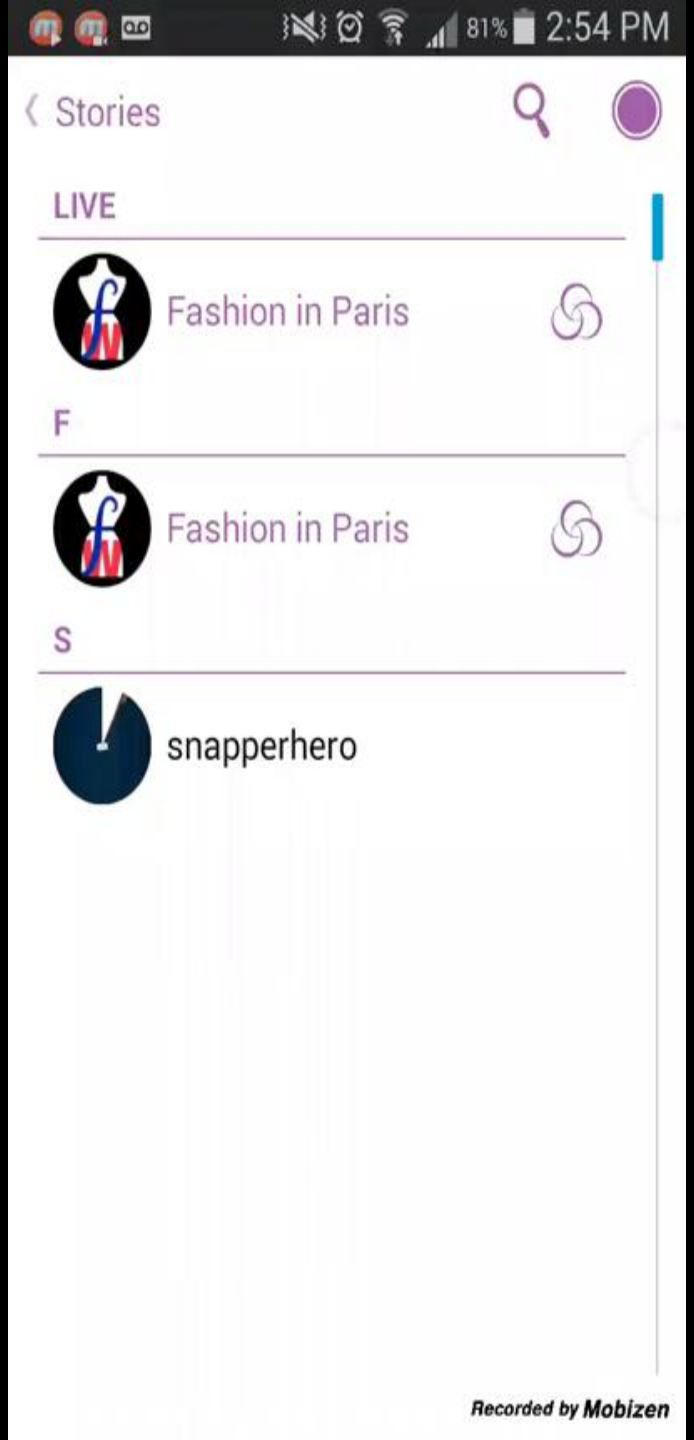

durch Technik
MONROE

Evolve to Audi ultra.
Audi
Vorsprung durch Technik

SNAPPER
HERO



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3. Original

DIGIDAY Brands Agencies Publishers Platforms

4 new cars unveiled on Meerkat and Periscope at New York's auto show

888

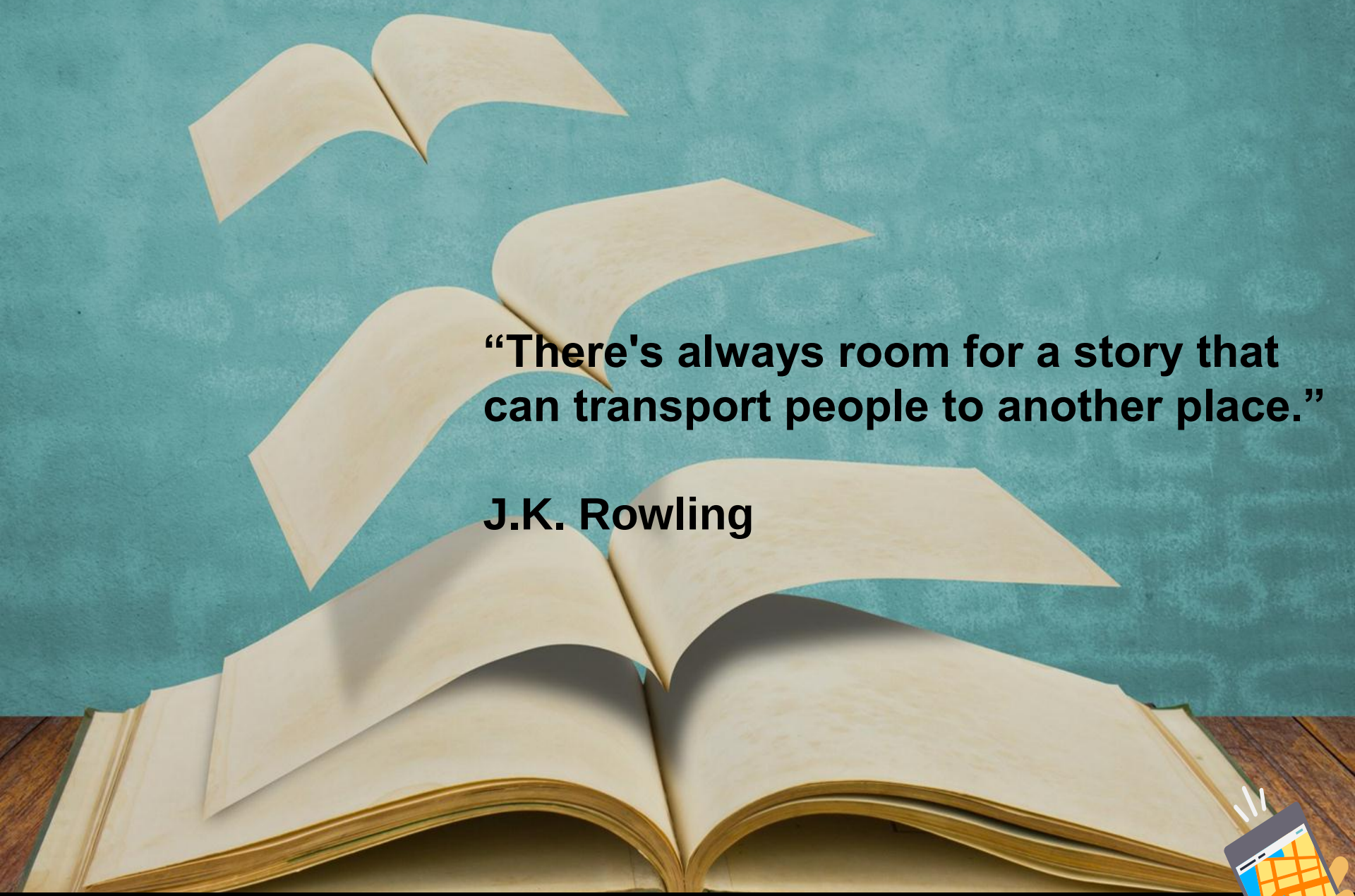
Tanya Dua @tanyadua | April 3, 2015

TLDR OFF

The 10 day-long New York International Auto Show officially shifts into gear today, but automakers are already at full speed on live-streaming darlings Meerkat and Periscope.

The jury might still be out on which platform will ultimately prevail, but these brands — including Jaguar, Toyota, Mercedes and Nissan — wasted no time starting accounts on to reveal their latest models ahead of the official kickoff.

4. For God sake let's be Entertaining



“There's always room for a story that can transport people to another place.”

J.K. Rowling

Content marketing is a commitment, not a campaign

Jon Buscall

Before I sign off

Creative Engineers

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THANKS!

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