

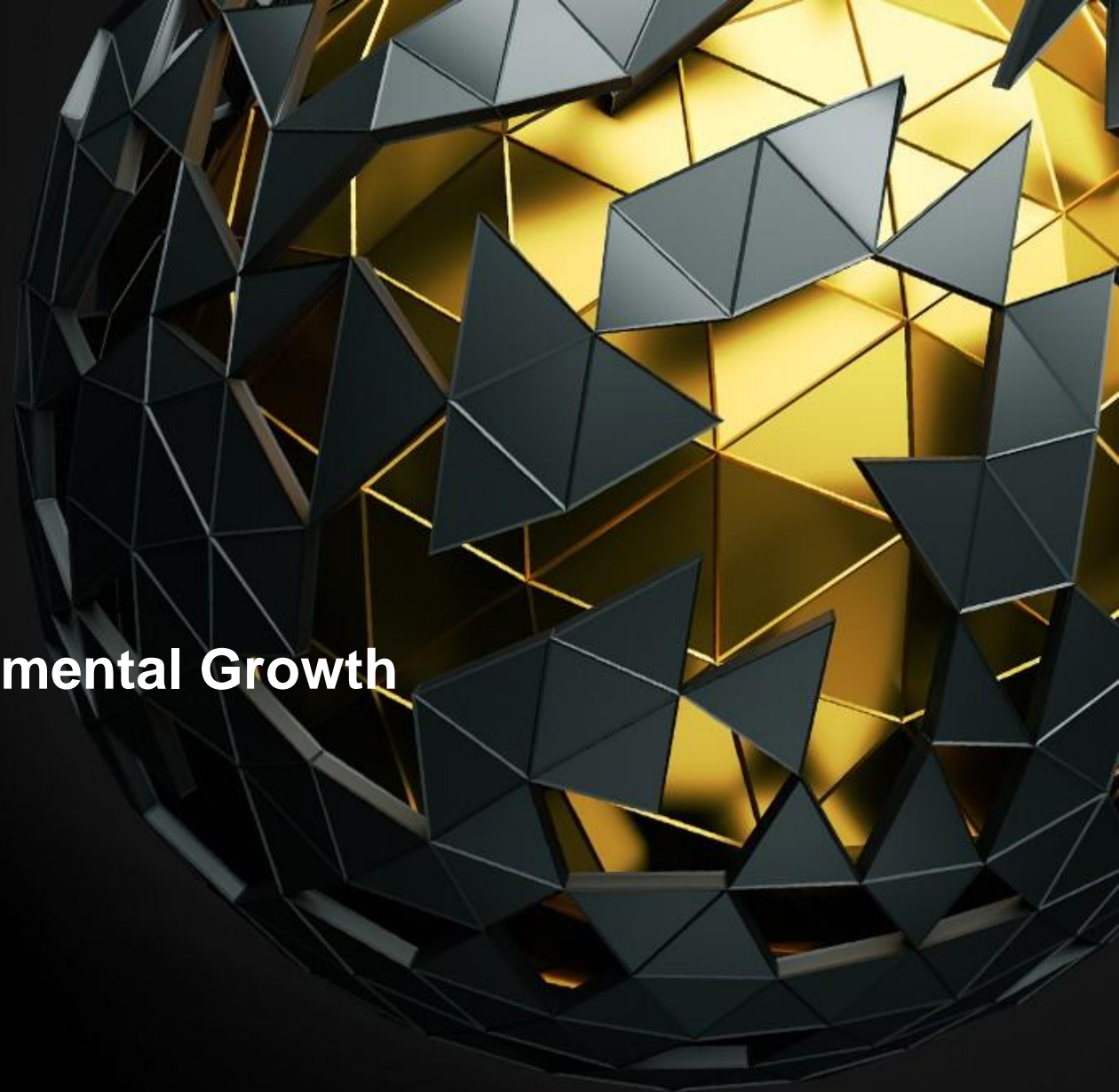
**KANTAR** **WORLD**PANEL

a CTR service in China

**如何善用创新寻找到变局中的机会点**

**What Makes an Innovation Bring Incremental Growth**

WINNING THE FUTURE







“根据我们的历史经验，促销虽然可以帮助我们**在短期内获得成功**，但是创新才能让我们**经久不败**。”

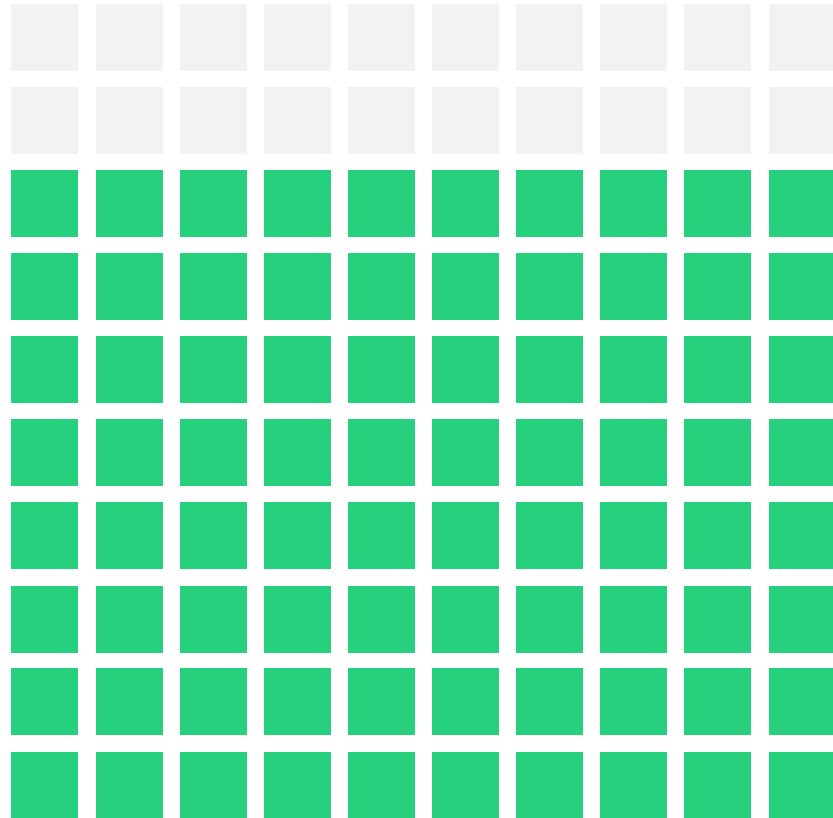
“We know from our history that while promotions may **win quarters**, innovation **wins decades**.”

**鲍勃·麦克唐纳, 前宝洁总裁**  
**Bob McDonald, former P&G CEO**

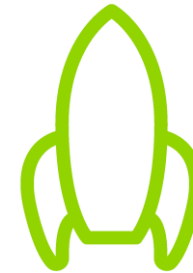


## 品牌在创新研究和新品发展上投入巨额资金

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

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

有多少新品单品能在上市一年后达到0.1%的渗透率？

How many of new launches(SKU) managed to reach a penetration of 0.1% in year one?

A



B



C



\*SKU or stock keeping unit is the individual code assigned to each new product launched

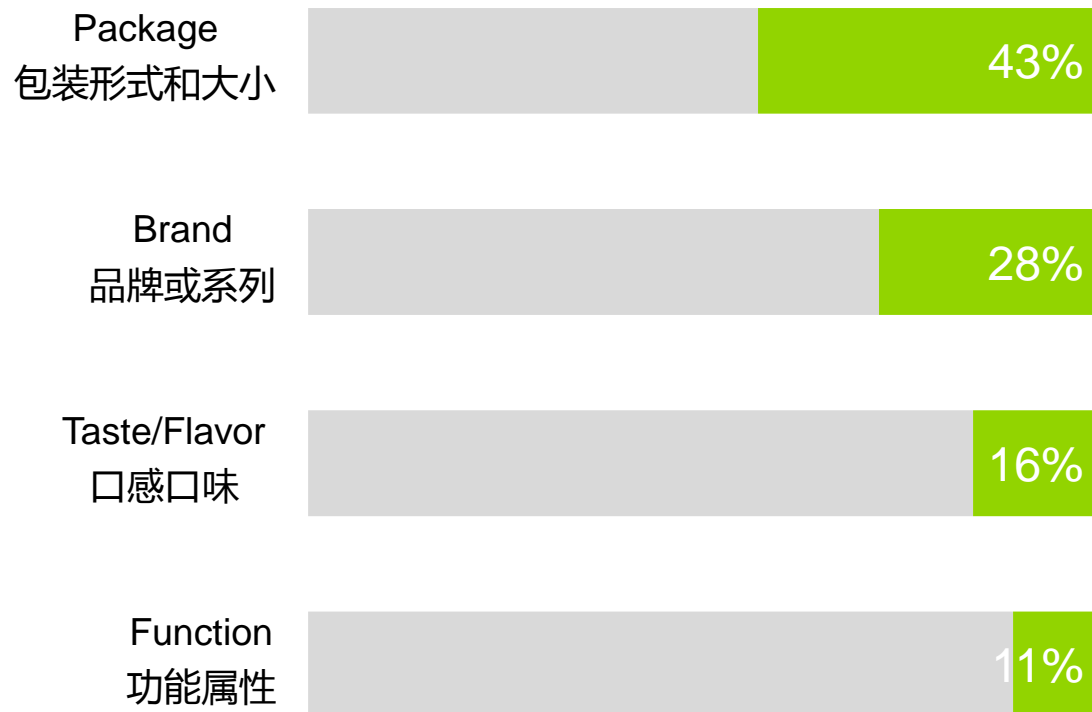
Data source: Kantar Worldpanel China New Launches in Latest 3 Years

**很多品牌都已经在建立了专属市场领域，所以多数新品只是在现有产品上进行微调**

**Most brands are already established in a market and so the bulk of their innovation is about a refinement or addition to an existing product**

% 新品类型

% of New Launches Type



43%

的新品单品都是对包装形式  
和大小进行改变

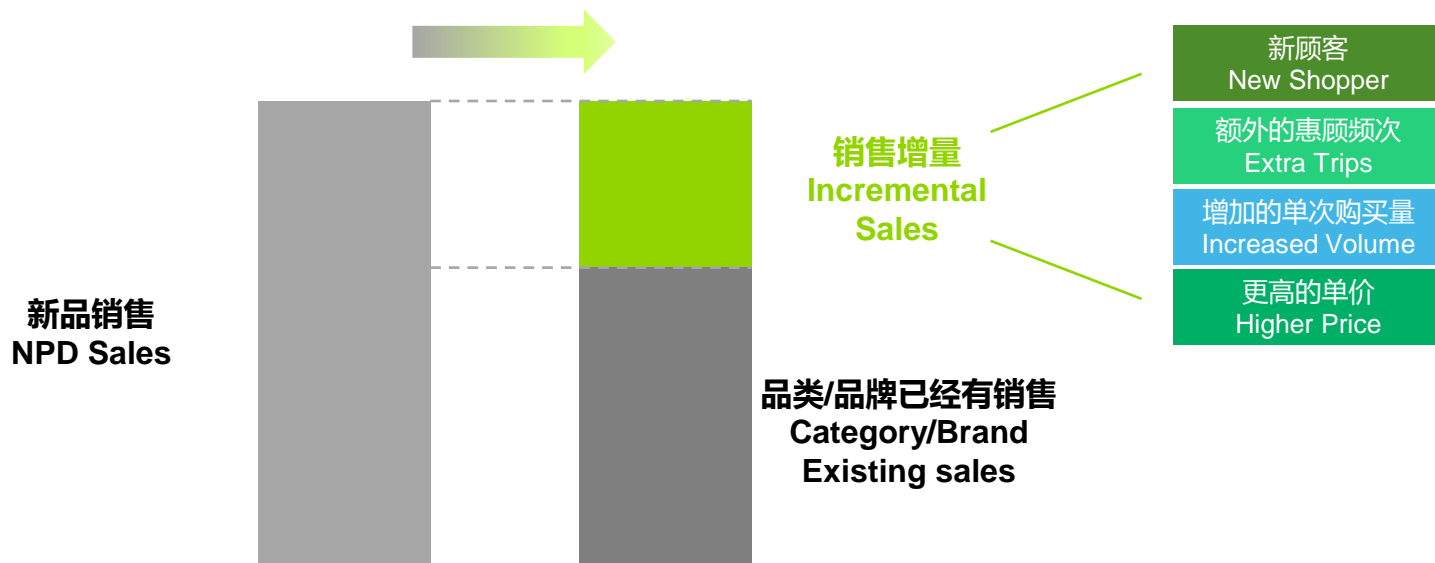
43%

of New Launches in China  
are new packsize /  
packtype

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

# 衡量新品真正价值的唯一指标是销售增量

Measuring the incremental value of innovation is the only way to ensure that a launch is really adding value to the brand



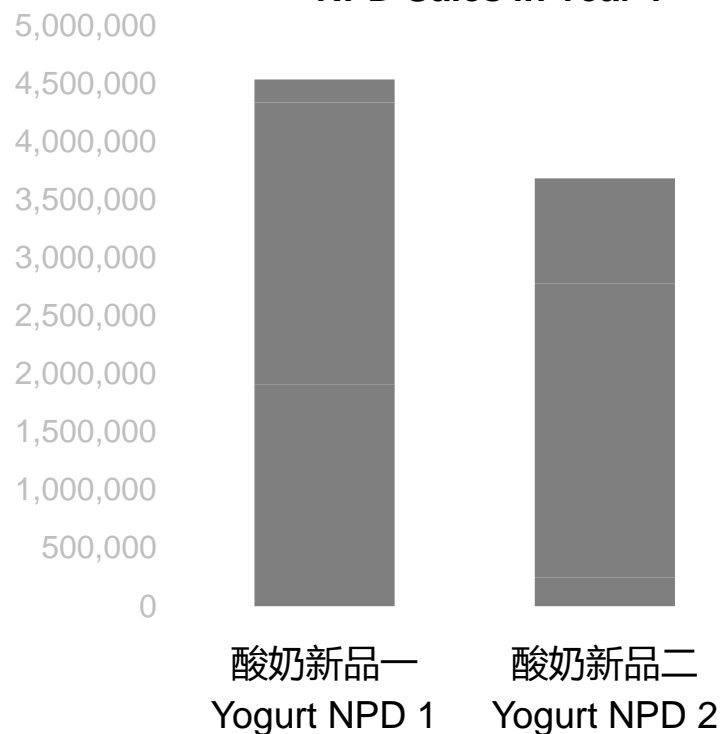
# 最大并非最好

## Biggest is not always the best

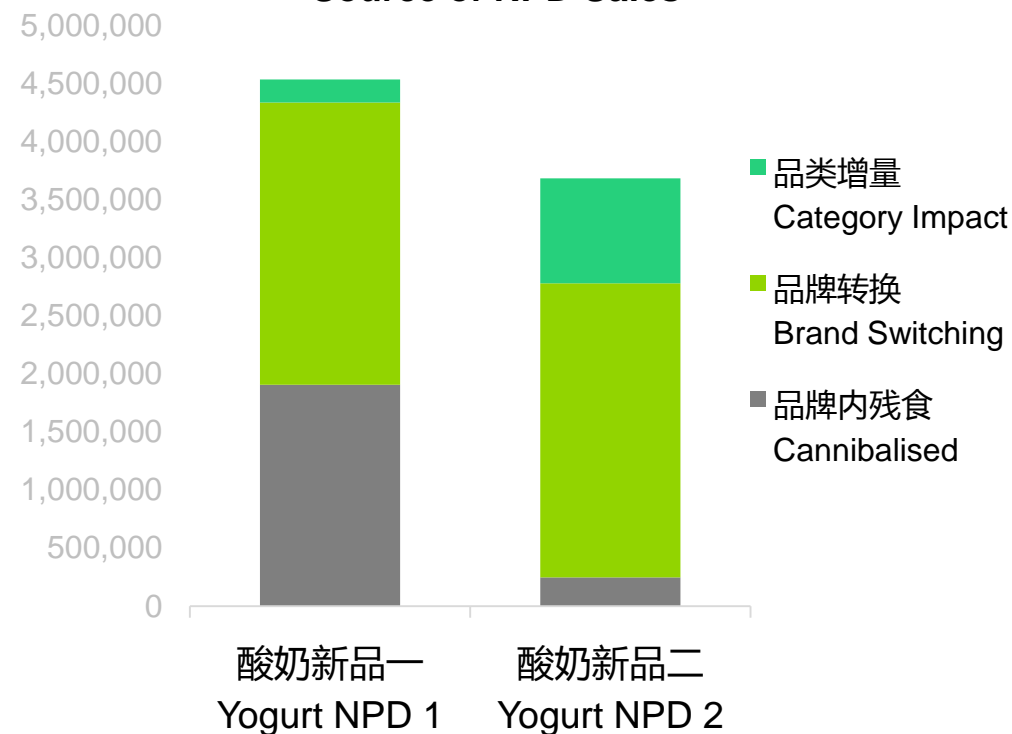


酸奶案例  
Real Yogurt  
Case

新品第一年销售额  
NPD Sales in Year 1



新品销售来源解析  
Source of NPD Sales



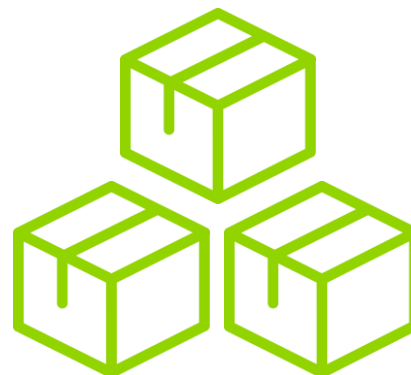
Data source: Kantar Worldpanel China New Launches in Latest 3 Years

**增量影响可以从两个层面上来衡量**

**There are two levels of incremental impact to measure NPD success**



**品牌增量影响**  
**Brand**  
**Incremental Impact**



**品类增量影响**  
**Category**  
**Incremental Impact**

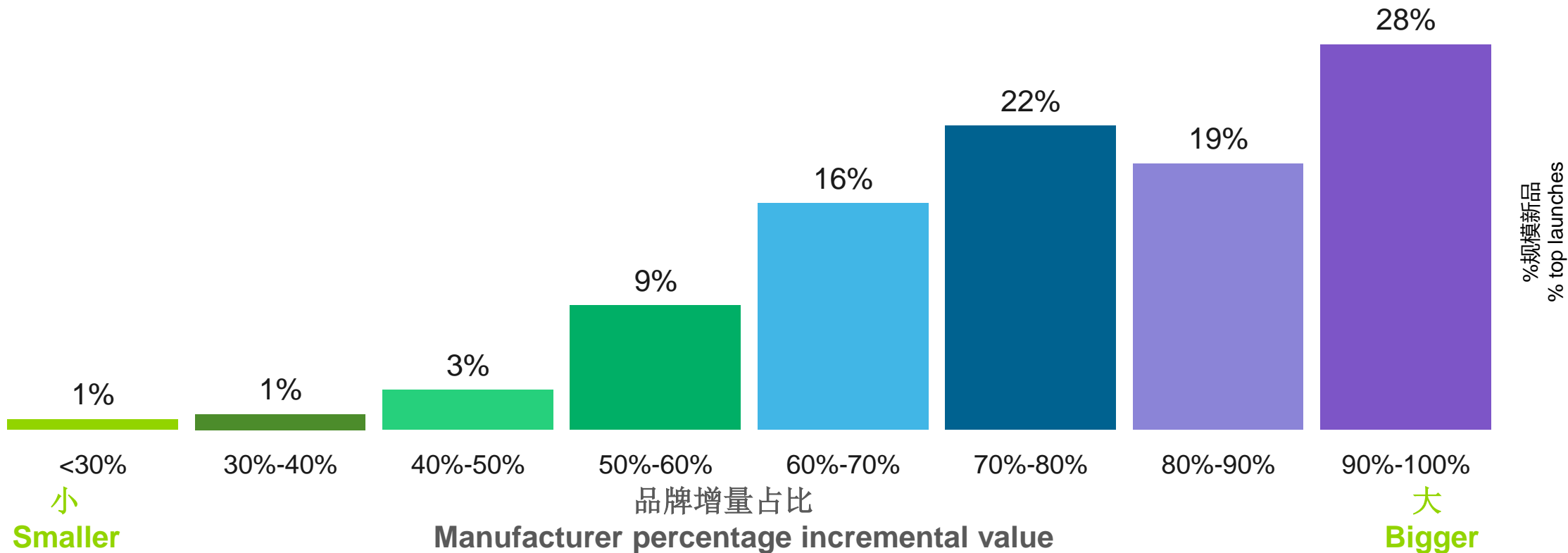
Data source: Kantar Worldpanel China New Launches in Latest 3 Years



# 创新无一例外都能为品牌带来增量 Top launches benefit the manufacturer



品牌提增量大小占比  
Size of manufacturer win

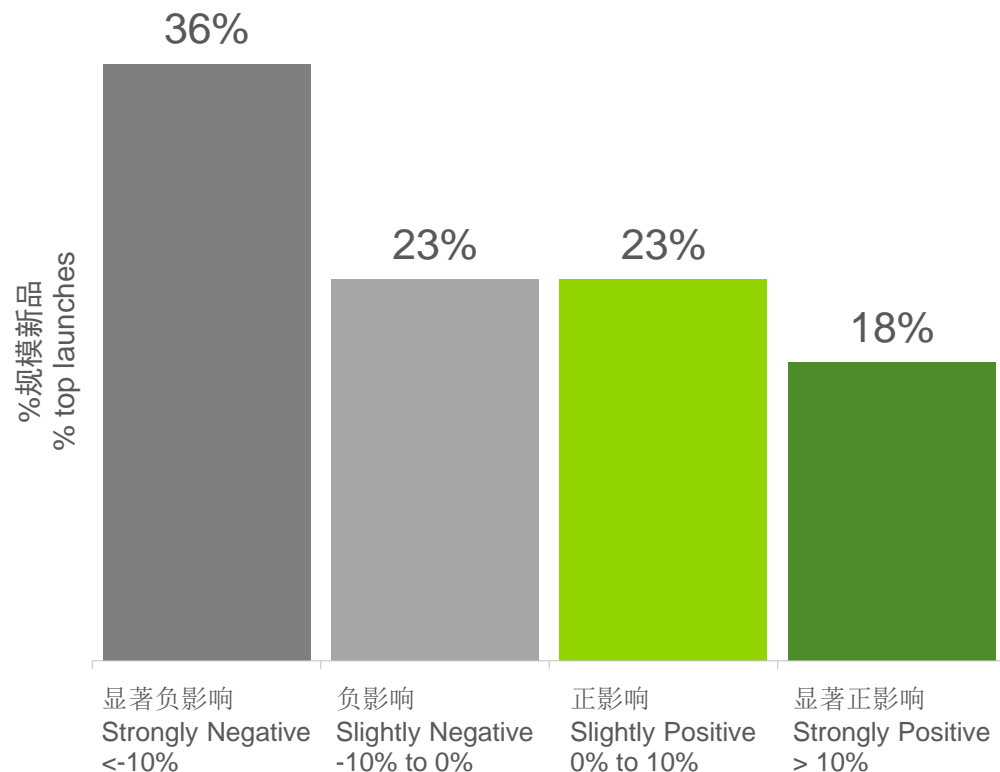


Data source: Kantar Worldpanel China New Launches in Latest 3 Years

# 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

能够给品类带来提升的新品才能在长期为品牌创造更多的价值  
Growing the value of the category as a whole is more beneficial over the long term



Today Apple is going to  
reinvent the phone, and  
here it is

**Steven Jobs**  
introducing the first iPhone



## 新品的销售增量可以通过四种方式获得

There are 4 ways to get incremental through NPD



新顾客  
NEW SHOPPERS



额外的惠顾  
EXTRA TRIPS



增加单次购买量  
INCREASED VOLUMES



更高的单价  
HIGHER PRICE

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

# 消费升级是获得销售提升的最可行方案

## Trading shoppers up is the most reliable lever for a positive impact

能够带来显著单项行为提升的规模新品数量  
Number of launches with significant positive  
shopper behavioural change (greater than +10%)

其中，能够带来总体销售提升的新品占比  
Proportion of these launches that have a positive  
overall effect



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

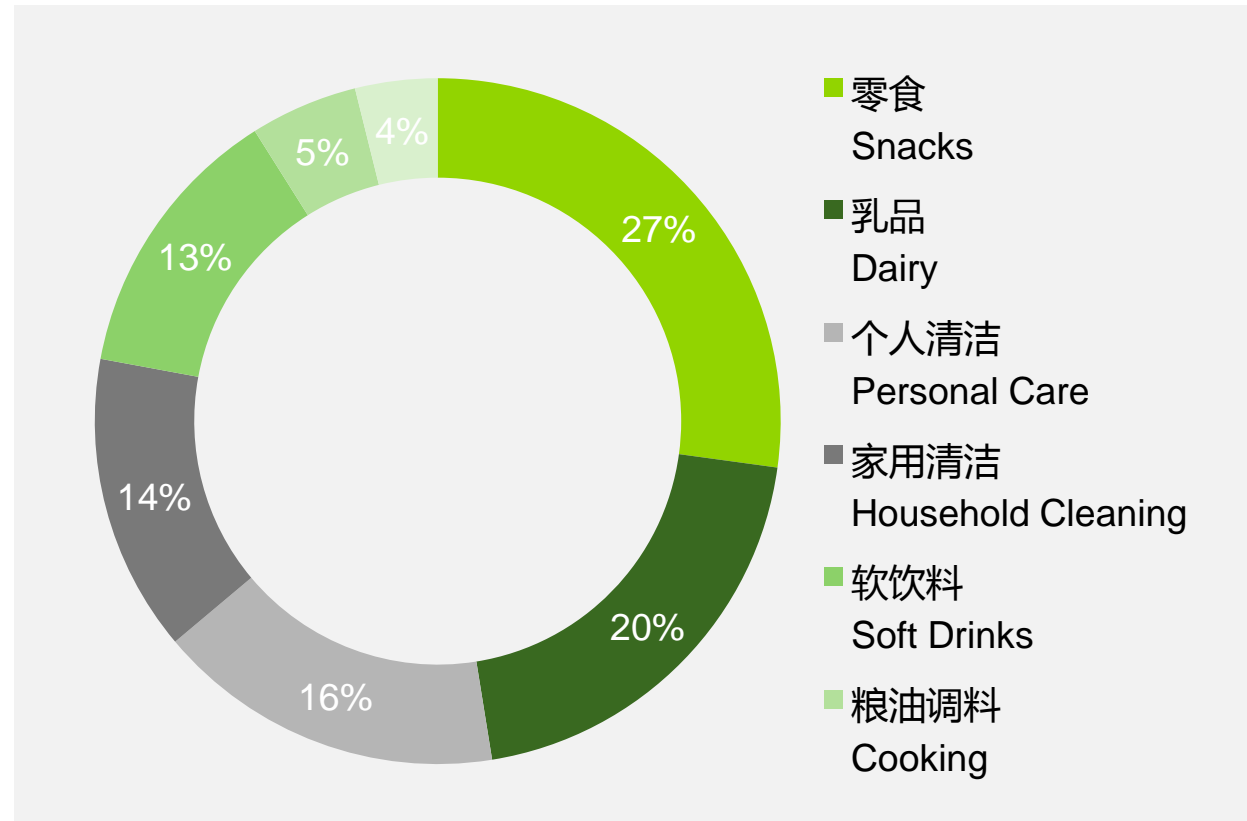


**新顾客** – 但是我们发现有一些品类仍然具有增长渗透率的潜力

**NEW BUYERS** – While some categories still have potential to grow penetration through NPD

%能够吸引新顾客的新品占比

%Contribution to Innovations that Attracting New Buyers



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



9%



9%



6%



10%



7%



3%





**新顾客** – 虽然带来新顾客很困难，但是一旦成功，品牌和品类所获得的受益也是非常可观的  
**NEW BUYERS** – Bringing new shoppers is hard, but if successful, it will be highly incremental



**绿箭**

脆皮软心薄荷糖

**Doublemint**

Chewy Mint



于2016年上市

Launched in 2016

为小品类带来令人激动的创新; 成功吸引了年轻人和女性消费者进入品类  
 BROUGHT EXCITEMENT TO GROW THE SMALL CATEGORY; ATTRACT  
 TEENAGERS AND FEMALE NEW USERS TO THE CATEGORY



为薄荷糖加入脆皮口感; 增添  
 趣味性同时口气清新  
 Add Crispy texture to Mint;  
 more fun while still refreshing

口香糖  
 Gum 43%

糖果  
 Candy 41%

其他薄荷糖  
 Other Mints 16%

新顾客主要来源于充气糖果  
 和口香糖，并没有对薄荷糖  
 有太多蚕食

Gains from Candy & Gum  
 while not directly  
 cannibalizes Mints

**52%**

由新顾客带来的销售  
 提升

Incremental from  
 New Buyers

## 额外的惠顾 – 只有创造新的消费场景，才能吸引顾客的额外购买

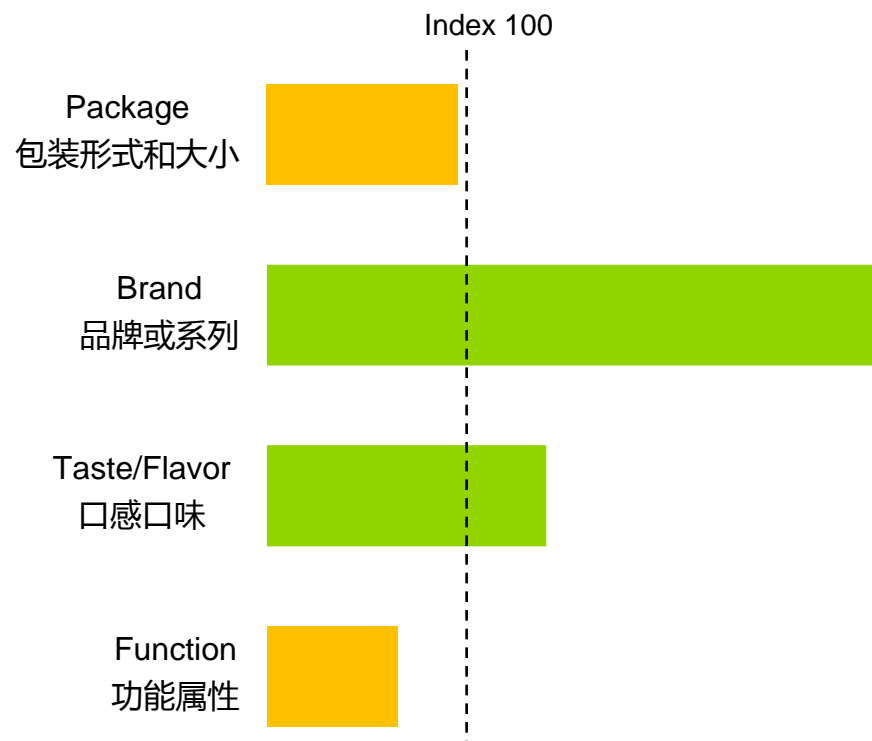
**EXTRA TRIPS** – Only launches that create new occasions can strongly drive trips increase

新品类型

(显著提升惠顾次数的新品 vs. 所有新品)

New Launches Type Index

(Strongly attracting new trips vs. total)



乳品  
DAIRY  
22%



纸巾  
TISSUES  
10%



糖果  
CANDY  
10%



果汁  
FRUIT  
JUICES  
9%

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



**额外的惠顾** – 了解消费者的购买和使用行为，从而找到拓展品牌的有效方式

**NEW TRIPS** – Understand how shoppers buy and use this category to stretch efficiently



**巴黎水**  
塑料包装瓶  
**Perrier**  
Plastic Bottle



于2017年上市  
Launched in 2017

找到新的消费场景，帮助消费者更容易接触到所需要的产品

DISCOVER NEW USAGE OCCASIONS AND MAKE IT EASIER FOR CONSUMERS



塑料包装瓶填补了巴黎水在运动和户外的市场空缺  
Plastic bottle complimented sports and out-of-home occasions



便利店铺货; 户外广告传达  
“随时随享，轻便携带”  
Distributed in CVS;  
Outdoor Ads communicates  
“drink anytime, easy to carry”

61%

由额外惠顾带来的销售提升  
Incremental from  
New Trips



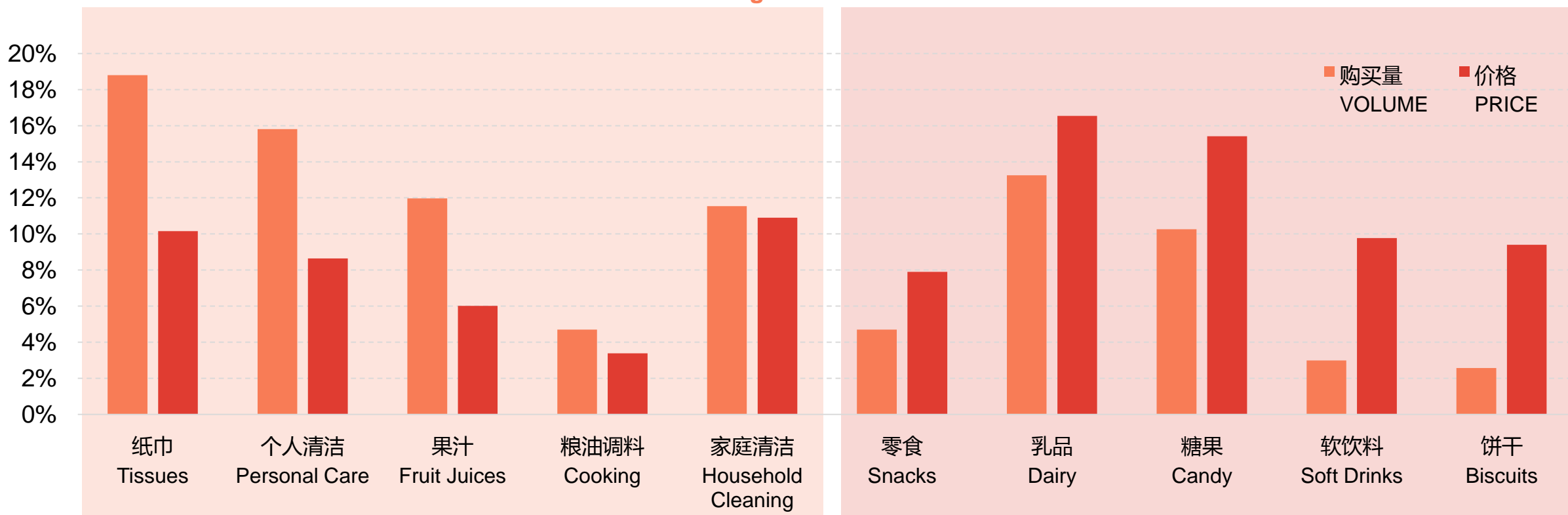
# 更高的购买量和单价 – 非食主要通过提升购买量获得新品的成功而食品则趋向高端化 HIGHER VOLUME AND PRICE – Non-food tended to be volume driven while Food categories showed strong premiumisation trend



%成功新品占比  
%Contribution to Innovations

购买量驱动品类  
Volume driven categories

价格驱动品类  
Price driven categories



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

**大包装** – 根据顾客消费行为的变化，提供更符合顾客需求的包装大小

**BIGGER PACK** – Volume increase goes along with the change of shopping behavior

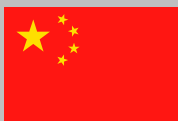


**心相印**

超迷你湿纸巾64片装

**XinXiangYin**

Wet Tissues 64 Pieces



于2016年上市

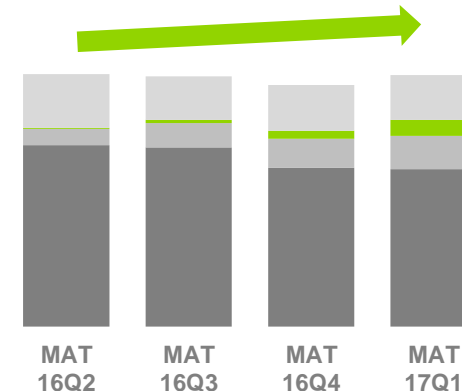
Launched in 2016

紧跟品类使用趋势同时推出价廉物美的产品提升顾客总体消费量

CAPTURE CATEGORY USAGE TREND AND PROVIDE MORE VALUE-FOR-MONEY OFFER TO SHOPPERS TO INCREASE OVERALL CONSUMPTION



持续的顾客沟通帮助提升湿巾的使用频率，同时带动对量的需求  
Continuous education on wet tissues; usage occasion increased alongside with the need of volume increased



大包装帮助品牌重新赢回市场份额

Bigger packs helped the brand to recover in terms of market share

**57%**

由更高的单次购买量带来的销售提升  
Incremental from Higher Volume

**高端化** – 高端新品往往更容易获得成功

**PREMIUMISATION** – Premiumisation is likely to be the most successful strategy



**蒙牛特仑苏**  
高端低温酸奶

**Mengniu TLS**

Premium Chilled Yogurt



于2017年上市  
Launched in 2017

品牌知名度和市场推广可以帮助新品成就规模; 高端的市场趋势可以保证品牌的高增长  
A KNOWN BRAND NAME AND EXTENSIVE SUPPORT CAN DELIVER SCALE;  
PREMIUMISATION TENDS TO ENSURE HIGH INCREMENTALITY

**60%**

高出品类平均单价  
Average Price  
Higher than  
Category Average

**69%**

为品牌带来的销售提升  
Incremental Sales to  
Manufacturer

**95%**

由高单价带来的销售提升  
Incremental from  
Higher Price

## 关于新品的三要三不要

### Three DOs and DON'Ts of Innovation



要用增量来衡量创新的真正价值  
USE INCREMENTAL TO  
MEASURE THE TRUE VALUE  
OF INNOVATION

不要只关注销售  
DON'T FOCUS ON SALES  
ONLY



要借助消费升级的市场趋势  
GO WITH MARKET TREND -  
PREMIUMISATION

不要冒险降级消费者  
DON'T TRADE  
CONSUMERS DOWN



要拓展消费宽度  
WIDEN SPACE FOR  
CONSUMPTION

不要只局限在眼前市场  
DON'T JUST LIMIT TO  
EXISTING MARKET





**KANTAR** **WORLD**PANEL

a CTR service in China

**THANKS!**

