KANTAR WORLDPANEL

a CTR service in China

激活消费场景，决胜户外市场
Activate Out-of-home Marketing in Different Shopping Missions

WINNING THE FUTURE

1828王老吉

'S SUNNY
HE PHILIPPINES

对于快消市场，存在着2个最大的消费场景
There are 2 big consumption occasions for FMCG products.

户内
AT HOME

OR

户外
OUT OF
HOME

比起户内，户外市场对于某些品类来说是个更大的市场

Compared with in-home, OOH market is much bigger for some categories.

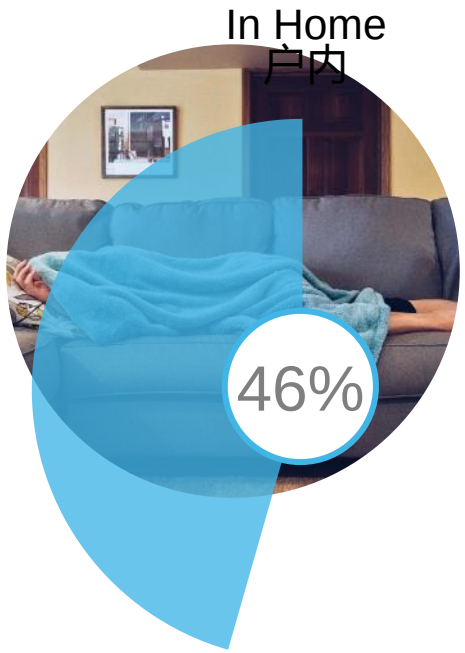
户内 vs. 户外 | 关键指标 | 重点、省会城市 | 截至17年6月滚动一年

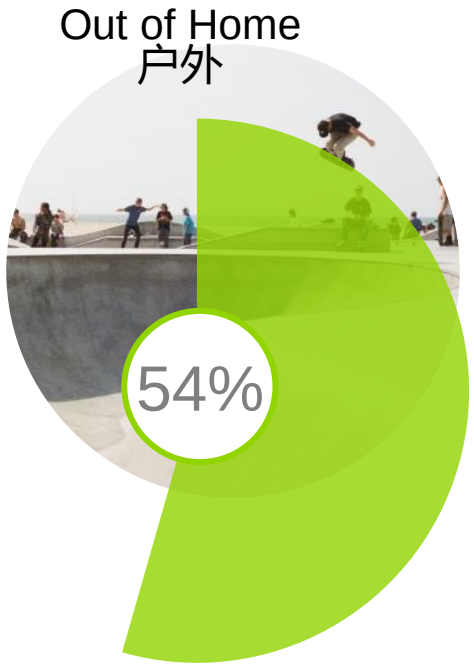
IH vs. OOH | KPI | Key & A | MAT17P6

53
Frequency
频次

44 RMB
Avg. spending / Trip
客单价

5.4
Packs per Trip
次均购买件数





94
Frequency
频次

15 RMB
Avg. spending / Trip
客单价

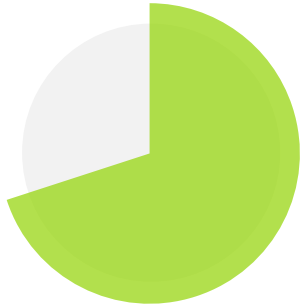
2.4
Packs per Trip
次均购买件数

- 数据源： 凯度消费者指数家庭样组/户外样组
- Data Source: Kantar Worldpanel Household Panel /Out-of-home Panel
- 覆盖品类包括饮料（瓶装水，功能饮料，亚洲传统饮料，果汁，茶饮，咖啡，碳酸饮料，奶茶），啤酒，零食类（饼干，巧克力，口香糖，薄荷糖，糖果，咸味小食），乳制品（冰淇淋，液体奶，豆浆豆奶，酸奶）
- Total market covers Beverage (Bottled Water, Functional Drink, Asia Traditional Drink, Juice, Tea, Coffee, CSD, Milk Tea), Beer, Snacking (Biscuits, Chocolate, Gum, Mint, Candies, Salty Snacks), Dairy (Ice Cream, Liquid Milk / Flavor Milk, Soy / Soybean Milk, Yogurt)

对于啤酒和饮料类，户外市场是占统治地位的。
OOH consumption on beer & beverage is dominant.

户外市场销售份额% |重点、省会城市 | 截至17年6月滚动一年
OOH SPENDING Value% BY Category | Key & A | MAT17P6

70%



Beverage
饮料

85%

Beer
啤酒

39%

Snacking
零食类

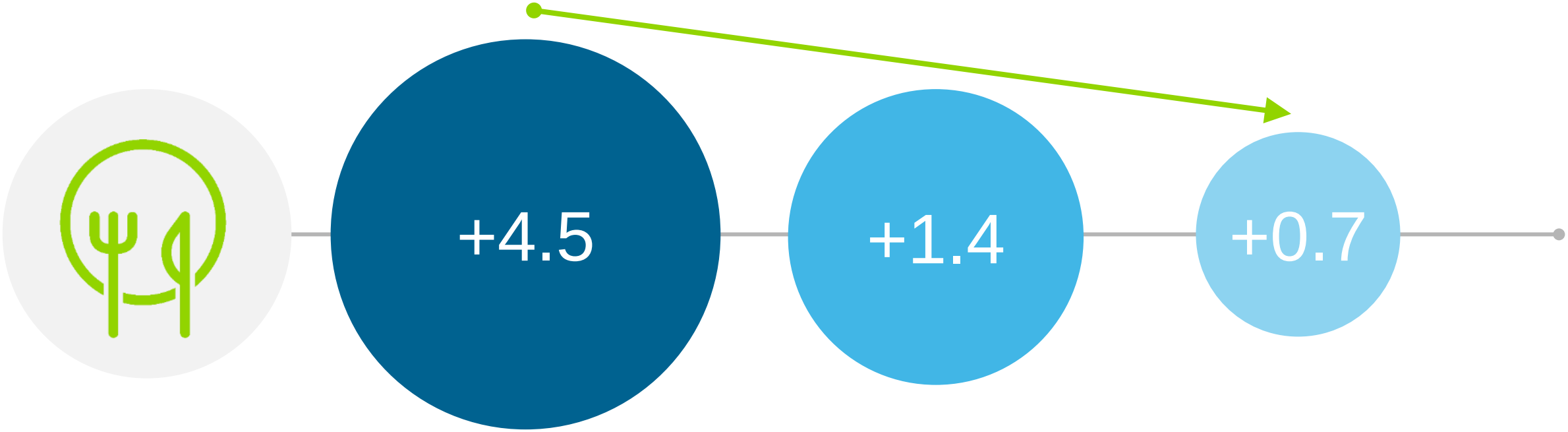
34%

Dairy
乳制品

- 数据源： 凯度消费者指数家庭样组/户外样组
- Data Source: Kantar Worldpanel Household Panel /Out-of-home Panel

近几年，户内食品类的增长持续放缓。
In-home food’s growth rate keeps slowing down in recent years.

户内食品销售额增长率%
Sales Value Growth Rate% of In-home Food



截至15年6月滚动一年
MAT15P6

截至16年6月滚动一年
MAT16P6

截至17年6月滚动一年
MAT17P6

- 数据源： 凯度消费者指数家庭样组
- Data Source: Kantar Worldpanel Household Panel

缤纷的户外活动如在外就餐、旅游和运动等都能带来巨大机会。
Big opportunities in different out of home activities like eating out, travelling and sports.

在家烹饪
Cooking In Home

4%

复合增长率
CAGR
(2010-2013)

3%

复合增长率
CAGR
(2013-2016)

+10.4%

International Travel Spending
跨国旅游花费

在外就餐
Eating Out

13%

10%

50%

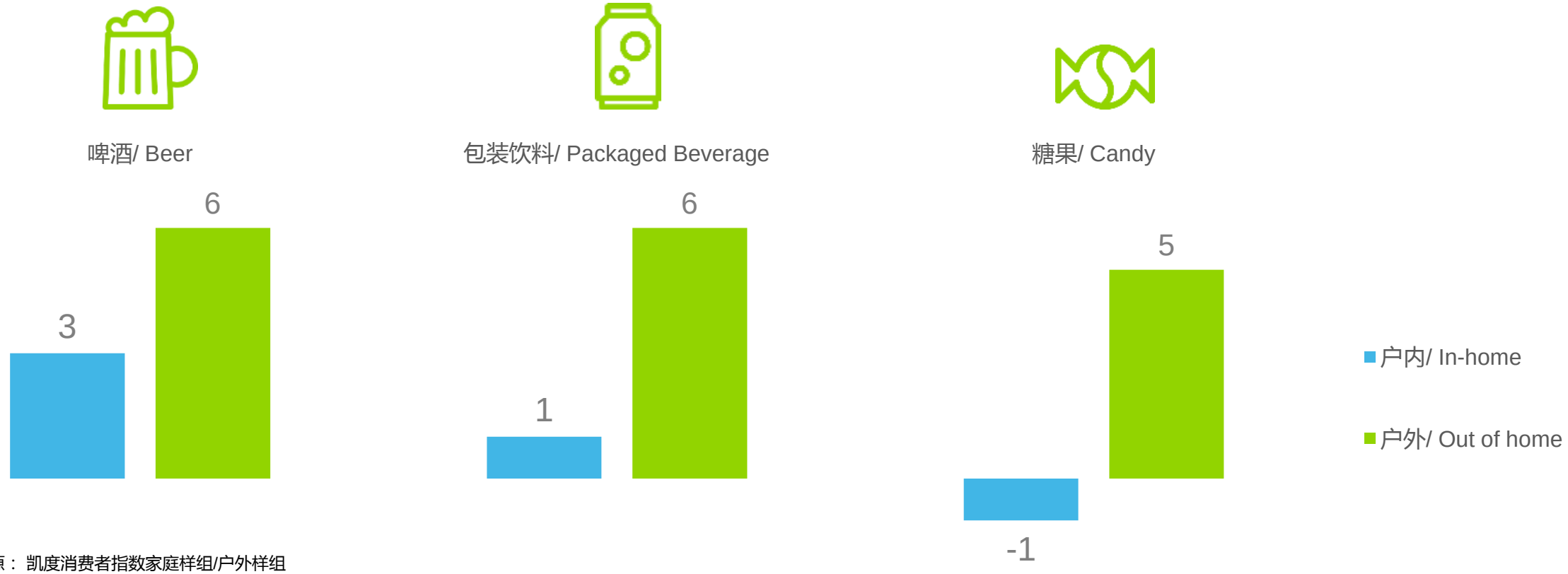
Penetration% of taking exercises
at least once a week
每周至少运动一次人数比例

数据源： 中国烹饪协会; 国家统计局; 中国旅游局； 凯度消费者指数体育小调查，,重度&关键城市,2016年8月,样本=834
Data Source: China Culinary Association; NBSC; National Tourism Board; Kantar Worldpanel Sports Survey, Key & A Cities, 2016P8, R=834

对于许多品类来讲，户外市场发展优于户内
OOH develop better than in home market for lots of categories.

户内 vs 户外 | 销售额增长率% | 重点、省会城市 | 17年1-6月对比去年同期

IH vs. OOH | Value Growth Rate% | Key & A | YTD17P6 vs YA



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挑战与机遇并存
There are also challenges for OOH business

短时间快速决策
Fast decision

可陈列空间相对较小
Limited Shelf Space

高即兴性
High impulsive

创建品牌的场景， 并在适当时机触发
Build brand association with scene and activate at right place right time

阿尔山环保手写瓶
Signature Bottle

虽然消费人群和消费地点千差万别，但主流的消费场景却是类似的
Typical of Out of Home have similar pace of different shoppers from different places

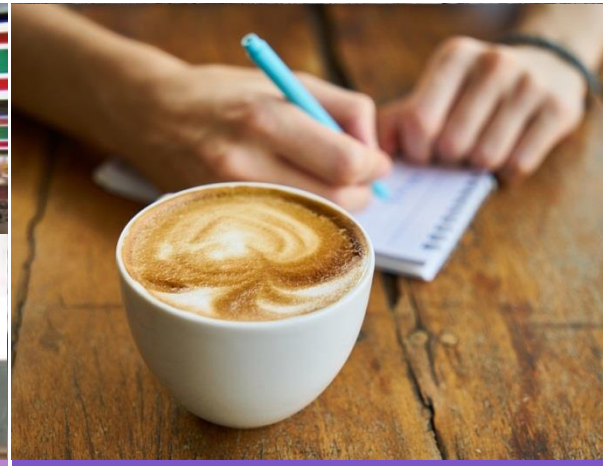
由**早餐**开始新的一天 A Day start with **Breakfast**	喝一杯咖啡，然后**进入工作状态** Having a cup of coffee to **kick off work**	很快和同事吃个快速**午餐** A quick fix **lunch** or meeting with friend.	下午**小憩一会**，给自己放松 Having some **break** to get through the day	吃个**晚餐**，与朋友小聚 Having proper **dinner** and meet some friends	饭后睡前，来点**小零食** Having some **snack** before sleep	**和孩子出游**或者**参与社交与户外运动** Outing with Kids or **Social Gathering**

开始一天的工作…
To start a weekday working…

喝一杯咖啡，**进入工作状态**
Having a cup of coffee to **kick off work**

20-29岁的女性来自上海
20-29y.o. Lady from Shanghai

便利店，咖啡厅
CVS, Café



现制茶饮/咖啡
On premise tea/coffee

30-39岁的男性来自广州
30-39y.o. Male from Guangzhou

便利店，杂货店
CVS, Grocery

即饮茶
RTD Tea

- 数据源： 凯度消费者指数户外样组
- Data Source: Kantar Worldpanel Out-of-home Panel

成功案例 — 全家湃客咖啡
Successful Case – Family Mart Parcafe

开始工作
kick off work

FamilyMart

May, 2014

Sep, 2015

Feb, 2017

升级店内设计，更多区域用于咖啡和用餐

Upgrading Store Design and More Area for Coffee & Meal

通过数字广告触达核心城市的年轻白领们
Digital Campaign targeting Young White Collar in Key Cities

236%

17年二季度对比去年同期销售额增长
Sales Value Growth 17Q2 vs. YA

工作前提神次数比例%
Workplace Uplift Occasion%

26%	VS	37%
便利店咖啡 total CVS Coffee		湃客咖啡 total Parcafe

- 数据源： 凯度消费者指数户外样组
- Data Source: Kantar Worldpanel Out-of-home Panel

下午小憩一会，喝一杯茶，尝试点新产品
Taking a break in the afternoon, have a cup of tea, try some new product。

下午**小憩一会**，给自己放松
Having a **break** to get through the day

20-29岁的女性来自上海
20-29y.o. Lady from Shanghai

便利店；新零食
CVS； Snack NPD

犒赏自己，舍得花钱
Spending more to Treat Myself

30-39岁的男性来自广州
30-39y.o. Male from Guangzhou

便利店/杂货店; 新品促销
CVS/Grocery; NPD on sale

清新口气
Prefer fresh breath function

- 数据源： 凯度消费者指数户外样组
- Data Source: Kantar Worldpanel Out-of-home Panel

成功案例 — 悠哈味觉糖
Successful Case – UHA

小憩放松
Having a break

新品味觉糖，口感更好，
内含真果汁
New Product Cororo with better taste and real Juice

可以在办公室做自己的DIY产品
Introduce more DIY food to consume in Office

+86%

17年上半年对比去年同期销售额增长
Sales Value Growth 17H1 vs. YA

办公室消费次数比例%
Office Consumption Occasion%

12%	VS	23%
总体糖果 total Candy		悠哈品牌 total UHA

- 数据源： 凯度消费者指数户外样组
- Data Source: Kantar Worldpanel Out-of-home Panel

与朋友小聚时的吃吃喝喝….
Meeting my friends is all about eating & drinking…

吃个晚餐，与朋友小聚
Having proper dinner and meet some friends

20-29岁的女性来自上海
20-29y.o. Lady from Shanghai

最常喝啤酒可乐，好喝的现制茶饮也非常愿意尝试
Beer and cola or delicious on-premise tea

30-39岁的男性来自广州
30-39y.o. Male from Guangzhou

中餐馆，啤酒，凉茶，选择我习惯喝的， 朋友推荐的
Chinese restaurant for dine together; beer, herbal tea, i will choose what i always have or friend recommend

- 数据源： 凯度消费者指数户外样组
- Data Source: Kantar Worldpanel Out-of-home Panel

成功案例 — 七喜
Successful Case – 7 Up

朋友聚餐
Leisure Meal Together

在大众点评上发起投票活动
Activity on Dianpin to vote for restaurant

在餐厅或酒吧里用七喜调特饮
Special drinks with 7 Up for restaurants & bars

用代言人直播的形式介绍新品
Celebrity broadcast to introduce special drinks

+14%

17年二季度对比去年同期销售量增长
Sales Volume Growth 17Q2 vs. YA

和朋友聚餐次数比例%
Leisure Meal Together Occasion%

27%	VS	38%
总体碳酸饮料 total CSD		总体七喜品牌 total 7Up

- 数据源： 凯度消费者指数户外样组
- Data Source: Kantar Worldpanel Out-of-home Panel

解锁更多户外消费场景
Unlock more Out of Home Shopping Scenario

在我们制定营销计划之前，我们必须回答下面的问题
Before we do a solid marketing plan for different shopping mission, we should answer the key questions below.

谁WHO
谁是这个场景的主要消费者
IS THE KEY OWNER OF THIS MISSION?

什么WHAT
什么产品更适合这个场景的需求
KIND OF PRODUCTS CAN FULFILL THE NEEDS OF THIS SHOPPING MISSION?

什么时候WHEN
对于这个消费场景来说时间是否合适
IS THE KEY TIMING FOR THIS SHOPPING MISSION?

为什么WHY
为什么消费者选择这个产品
THE CONSUMERS CHOOSE THIS PRODUCT?

哪里WHERE
对于该消费场景，你的渠道是否合适
IS THE KEY CHANNEL TO REACH THIS SPECIFIC SHOPPING MISSION?

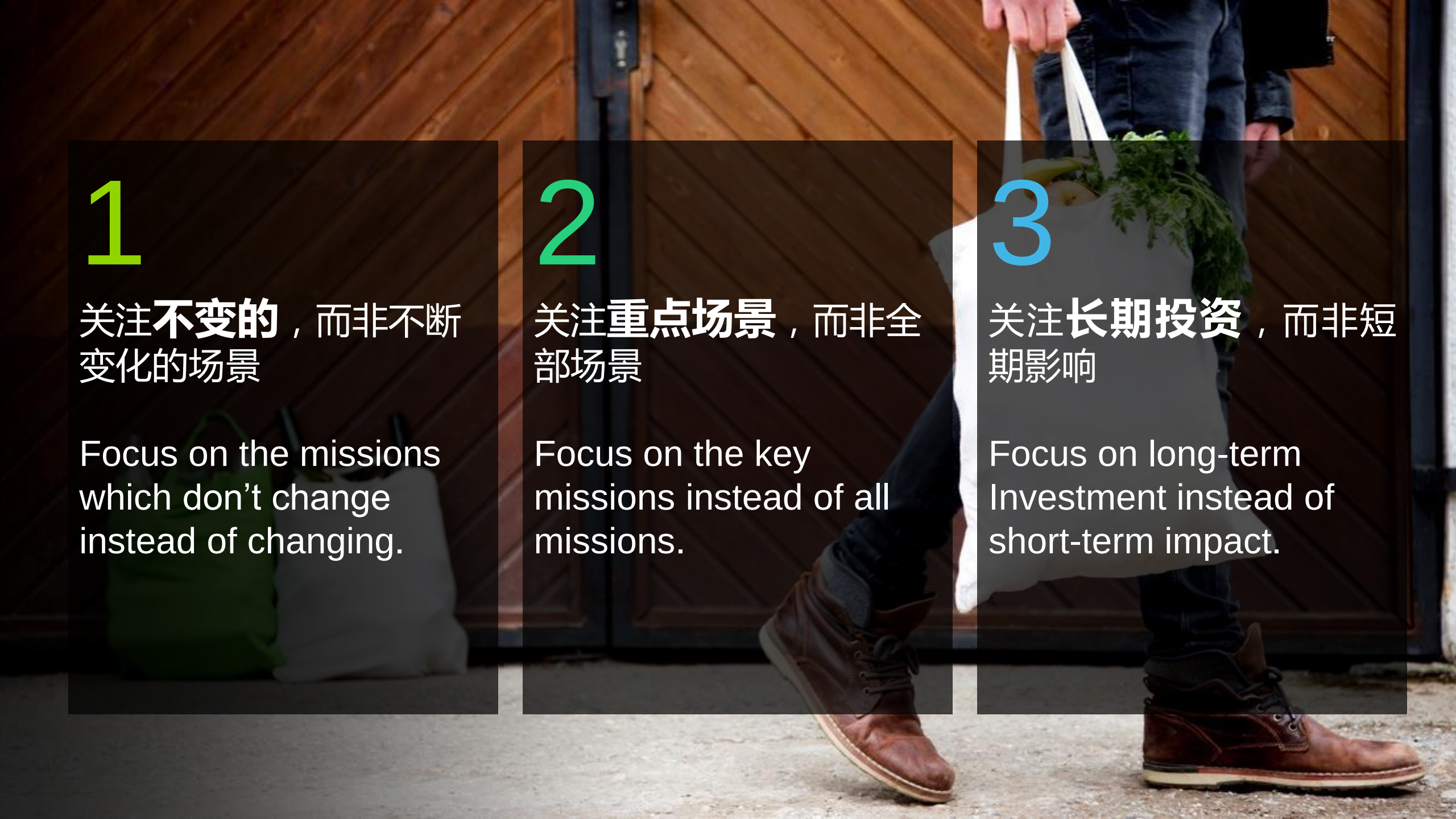
怎么做HOW
如何同不同的消费者做沟通
TO COMMUNICATION WITH DIFFERENT CONSUMERS?

深入理解消费场景

A Deep Understanding on Shopping Missions

3个原则，让营销策划更好与消费场景融合

3 Principles of Marketing Planning for Shopping Missions



1

关注**不变的**，而非不断变化的场景

Focus on the missions which don’t change instead of changing.

2

关注**重点场景**，而非全部场景

Focus on the key missions instead of all missions.

3

关注**长期投资**，而非短期影响

Focus on long-term Investment instead of short-term impact.

KANTAR WORLDPANEL

a **CTR** service in China

THANKS!