KANTAR WORLDPANEL

a CTR service in China



激发新零售时代的增长潜能

Unleash The Growth Potential In The New Retail Era

WINNING THE FUTURE

关于零售界的新闻层出不穷 A lot of news out there!



2016.1盒马鲜生 第一家门店在上海开 业
Hemaxiansheng opened its first store in SH

2017.8.9 淘宝便利店上线 Taobao convenient store launched

淘宝便利店 1小时达

2017.7.5 阿里巴巴推出“天猫精灵” Alibaba's Tmall Genie was introduced





2016.6.20 京东集团与沃尔玛达成深度战略合作,1号店并入京东 JD & Walmart started their strategic cooperation. YHD.com joined JD.



2016.8 缤果盒子第一家门店落户广东中山
BingoBox's first store at Zhongshan GD



2017.7.8 “TAOCAFE” 亮相第二届淘宝造物节 TAOCAFE made its debut at the second Taobao Maker Festival



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



未来的十年、二十年，没有电子商务这一说，只有**新零售**这一说，线下的企业必须走到线上去，线上的企业必须走到线下来，**线上线下加上现代物流**合在一起，才能真正创造出新的零售来。

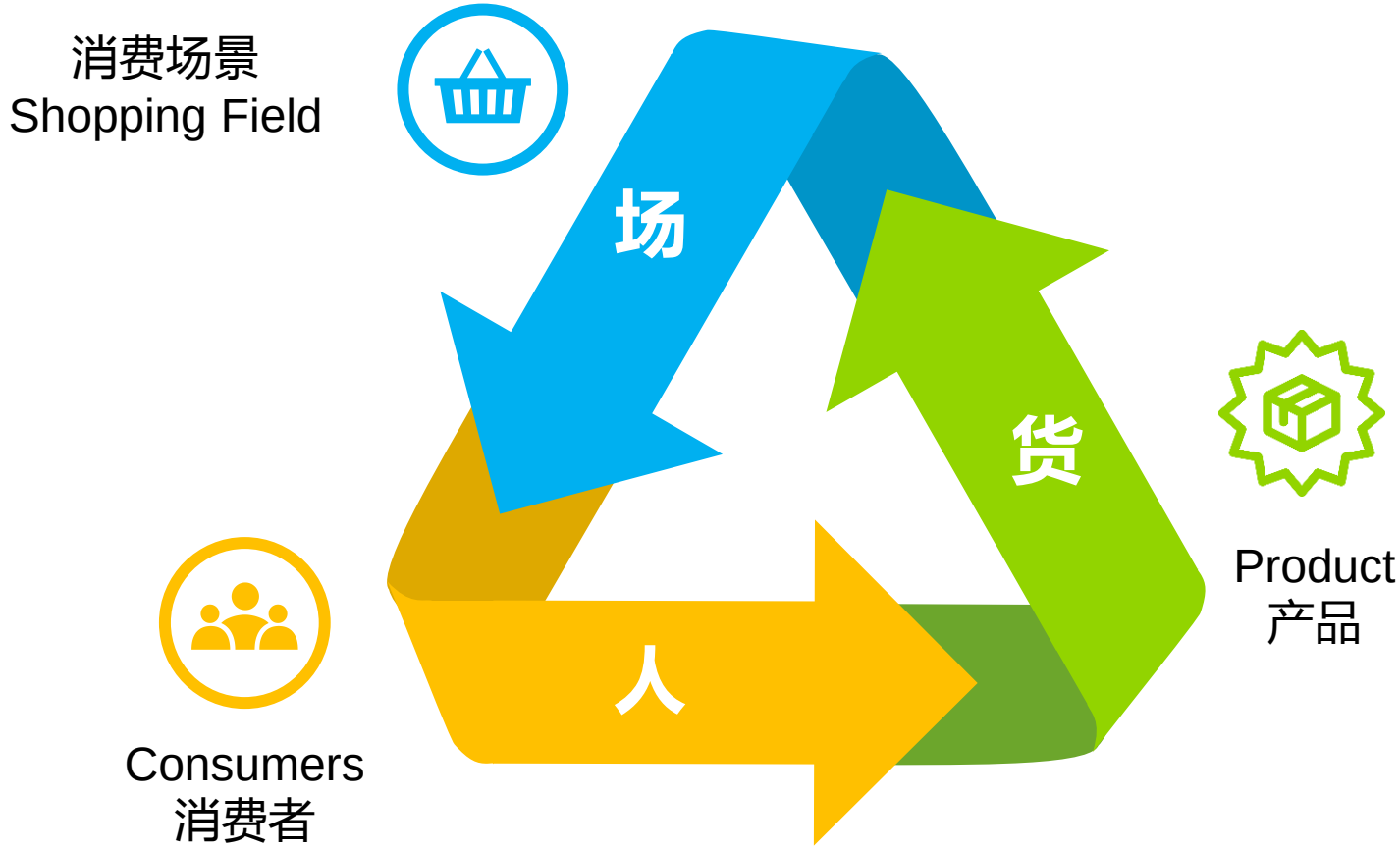
There will be no ecommerce but only **New Retail** in future, which is the combination of **Online + Offline + Modern logistics.**

——马云 Jack Ma（2016.10.13）

新零售是什么？What Is “New Retail”？

以消费者为核心的，以技术为手段的，产品、场景的优化配置，从而实现零售效率的提高

Consumer oriented，optimized distribution of products, fields with technology, to improve retail efficiency.



互联网时代的消费者

Consumers In Internet Era



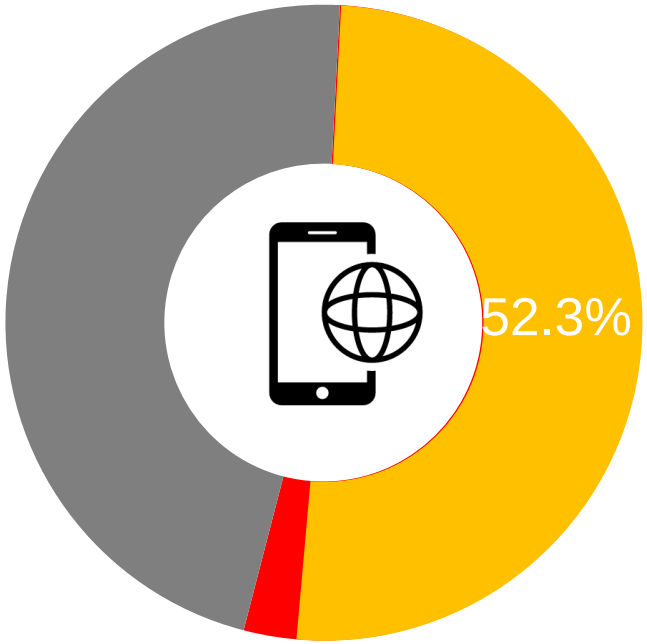
更花心的消费者

Consumers Without Loyalty

更懒的消费者

Lazier Consumers

互联网的普及造就了新一代的消费者
The popularity of Internet characterized a new generation of consumers



网络用户
Internet Users

Users

61.6%

线下实体店使用
手机支付比例
Offline Mobile Payment

2.78亿

网约出租车用户
Passenger # That Booked Taxi Online

数据源：中国互联网络信息中心 2017.6
Data Source ： CNNIC 2017.6

极度丰富的物质养育了更加花心的消费者
The prosperity of commodities made buyers less loyal.

79,591

今年上半年，有超过7万个快消品新品上市

There are 70,000+ new FMCG items from Jan to Jun

67%

消费者有接近7成的可能性在下一次购买中更换品牌

There is a 67% chance that a consumer will change brand at their next purchase

7+

消费者会在超过7个渠道里购买快速消费品

Consumer purchased FMCG in more than 7 channels

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

消费者更忙，也更懒
Consumers are busier, and lazier.

中国城镇家庭平均购买
China Urban Household purchase

78次 **快速消费品**
FMCG

比两年前减少

6次

6 times less than 2 years ago

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

以人为本，需求导向
Human oriented，start from demand



更多使用价值
More functional Value



更细分的市场
More sophisticated

更高附加价值
More additional value

更细分的市场，更完善的产品组合
Better market segmentation, better product combination.

丰富的底妆颜色，符合不同皮肤的色调、白度和红度
Various foundation colors are designed for different tones, whiteness and redness of the skin.



COVERMARK

色调种类

	蓝色调			黄色调		
	粉色系	自然色系	小麦色系	小麦色系	自然色系	粉色系
明度 高			BO 00	YO 00	YN 00	
		BN 10	BO 10		YN 10	YP 10
	BP 20	BN 20	BO 20		YN 20	YP 20
低		BN 30				YP 30

从普通夜用卫生巾拓展到裤型卫生巾
Overnight pads are extended into pants form







裤型卫生巾消费者同比增长率
Pants Sales buyer growth rate

+60%

vs. +2.6% 卫生巾总体
Total Fem Care

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

提高使用价值，用科技为产品加持
Enhance product functional value by incorporating technology

非浓缩还原果汁 NFC Original Juice

消费者人数同比 **+147%**

vs. -2%总体果汁
Total Juice





8月22日，“现男友面膜”上市两天即售罄，成为“涂抹类面膜销售NO.1”

Olay's Magnes Masks sold out two days after its launch, becoming the champion in sales of applicable facial masks.



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

丰富产品的附加价值
Increase the additional value of products

农夫山泉 X“网易云音乐”：卖产品也售卖情怀
Nongfu Spring X Music 163 introducing the“Music bottle ” in 69 cities.

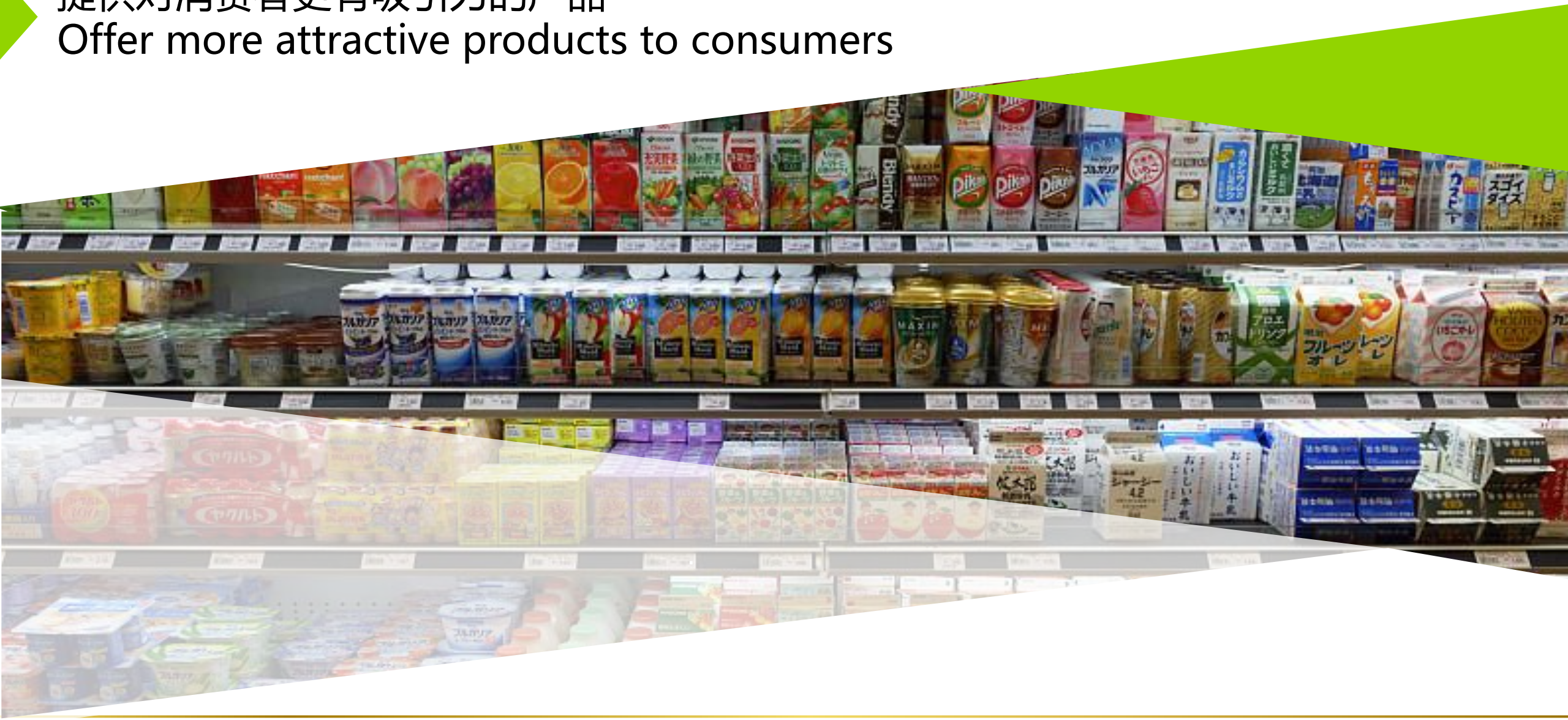


味全理由瓶>Hi 瓶>拼字瓶：情感共鸣到参与体验
Weiquan Reason Bottles>Hi Bottles>Word Puzzle Bottles: From emotional connection to participation



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

提供对消费者更有吸引力的产品
Offer more attractive products to consumers



格蕾丝的一天 Grace's One Day'

12pm

用手机叫“饿了么”外卖，在办公室刷刷微博，看看直播

9pm

在商场逛街,用支付宝买折扣奶茶，顺便去优衣库试穿，提货

8am

搭地铁上班途中浏览天猫，要不要买优衣库的连衣裙呢？顺手用优衣库APP查了附近门店，有库存。纠结一下。

7pm

和闺蜜在永辉超级物种挑选牛排，“微信”结账后直接加工，享用美食

微信支付



1am

睡前刷刷微信朋友圈，这个悦诗风吟微信广告好小清新，点击直接购买了一盒面膜试试。

2pm

冲个咖啡胶囊，顺便淘宝下单补货。在淘宝“猜你喜欢”又看到了早上的连衣裙，决定通过优衣库APP下单，晚上提货

4pm

下午茶时间。用“淘宝便利店”手机下单两个水蜜桃


更便捷 More Convenience
More Integration 更融合
更多体验 More Experience

更融合的“互联网+“的购物场景
” Mobile Internet +” shopping field



线下OFFLINE

VS

线上ONLINE



线下OFFLINE			线上ONLINE		
质量保证 Good quality	**导购** Good consultation	**会员专享** Design for me loyalty / membership card	**物有所值** Value for money	**给力的促销** Good promotion	**独特产品** Exclusive products

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

更融合的“互联网+“的购物场景
” Mobile Internet +” shopping field

线下OFFLINE

线上ONLINE

质量保证 Good quality

导购 Good consultation

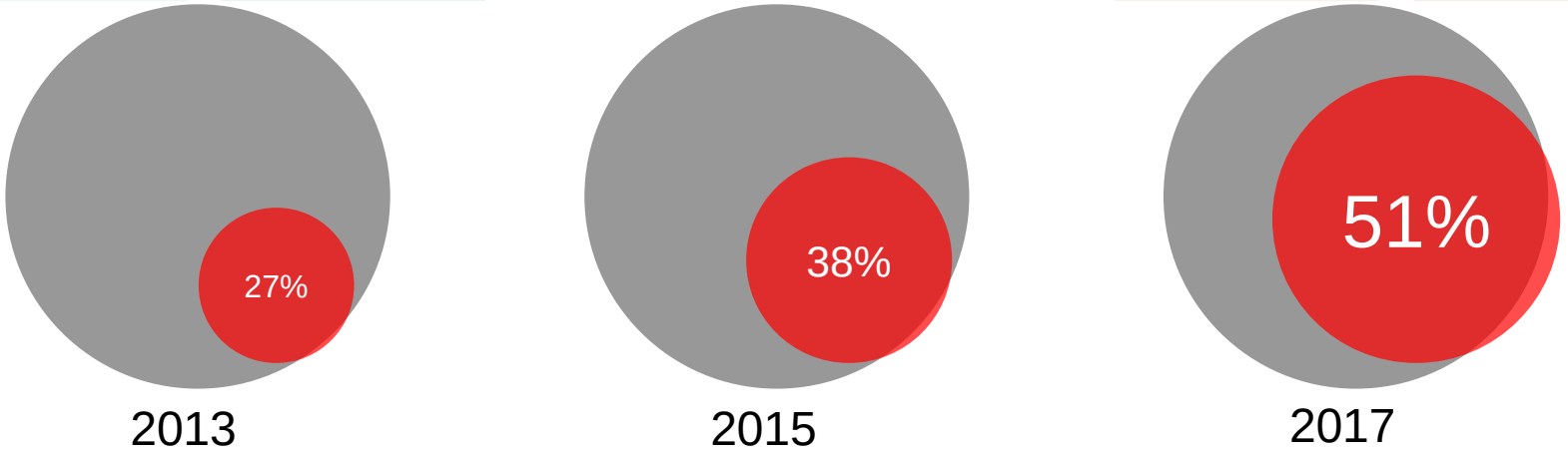
会员专享 Design for me loyalty / membership card

物有所值 Value for money

良好促销 Good promotion

高档产品 Exclusive products

消费者比例Buyer%



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

更融合的“互联网+“的购物场景
” Mobile Internet +” shopping field

物美多点:互联网+大卖场
WUMART Dmall:
Online + Offline hypermarket



线上多点下单，送货上门
Online: Dmall order, offline delivery
线下微信支付X物美会员系统
Wechat X Wumart member system

盒马鲜生:互联网+实体超市+餐饮
Online + Offline supermarket + catering



支付宝支付
Ali Pay

“3公里，30分钟”
“3km,30mins”

天猫小店：互联网+便利店
Tmall CVS: Online + CVS



根据超市附近消费者需求进行货品Products management based on consumers’ profile

优化场景，提供省时省力的解决方案
Offer solution with better shopping field to save time and effort

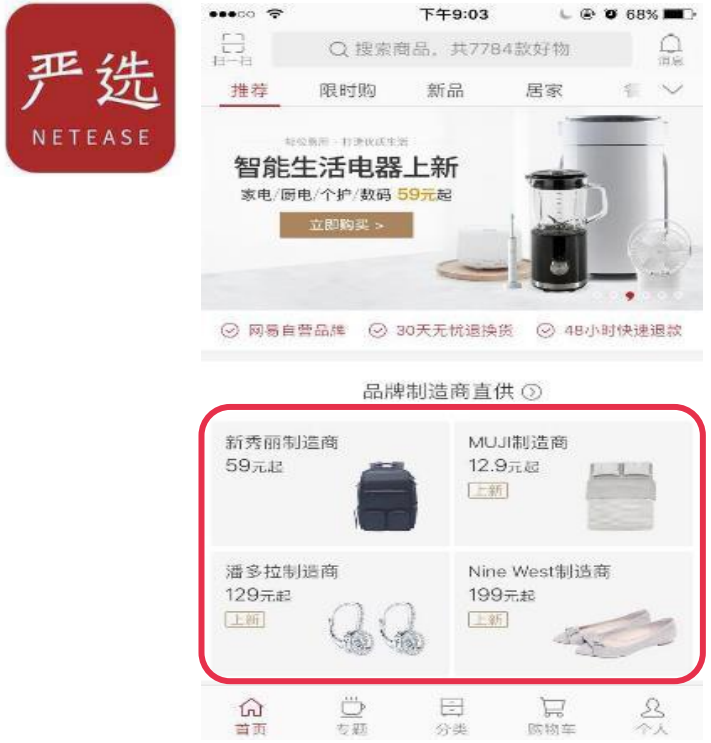
从商品到服务
From Product to service



超级物种：
从食材到热菜
Super species:
From food material to cooked dishes



“好的生活，没那么贵”
“better life, not that expensive”



延伸场景，打造“体验式”消费
Expand shopping field with experience besides shopping

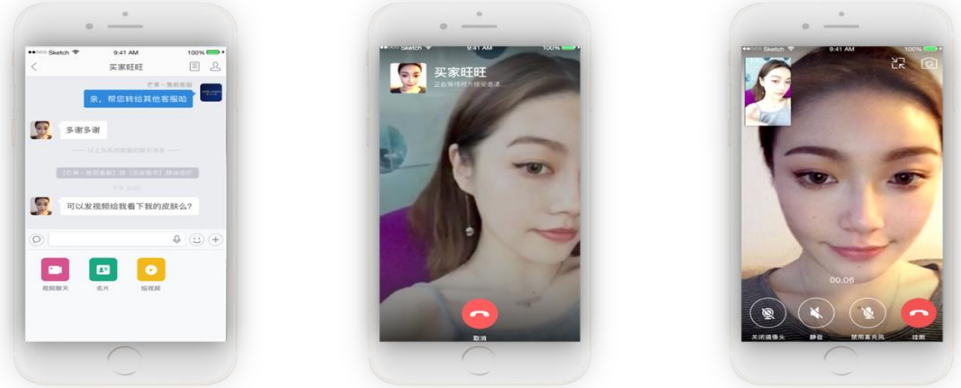




飞凡狂逛节“全民AR寻宝”
Feifan Shopping Festival

集齐萌宠，获得零花钱和品牌优惠券
Acquire cash and coupon for certain brands by collecting dolls
累计创造了**478万次**AR寻宝的战绩
4.78 million hunting games were created

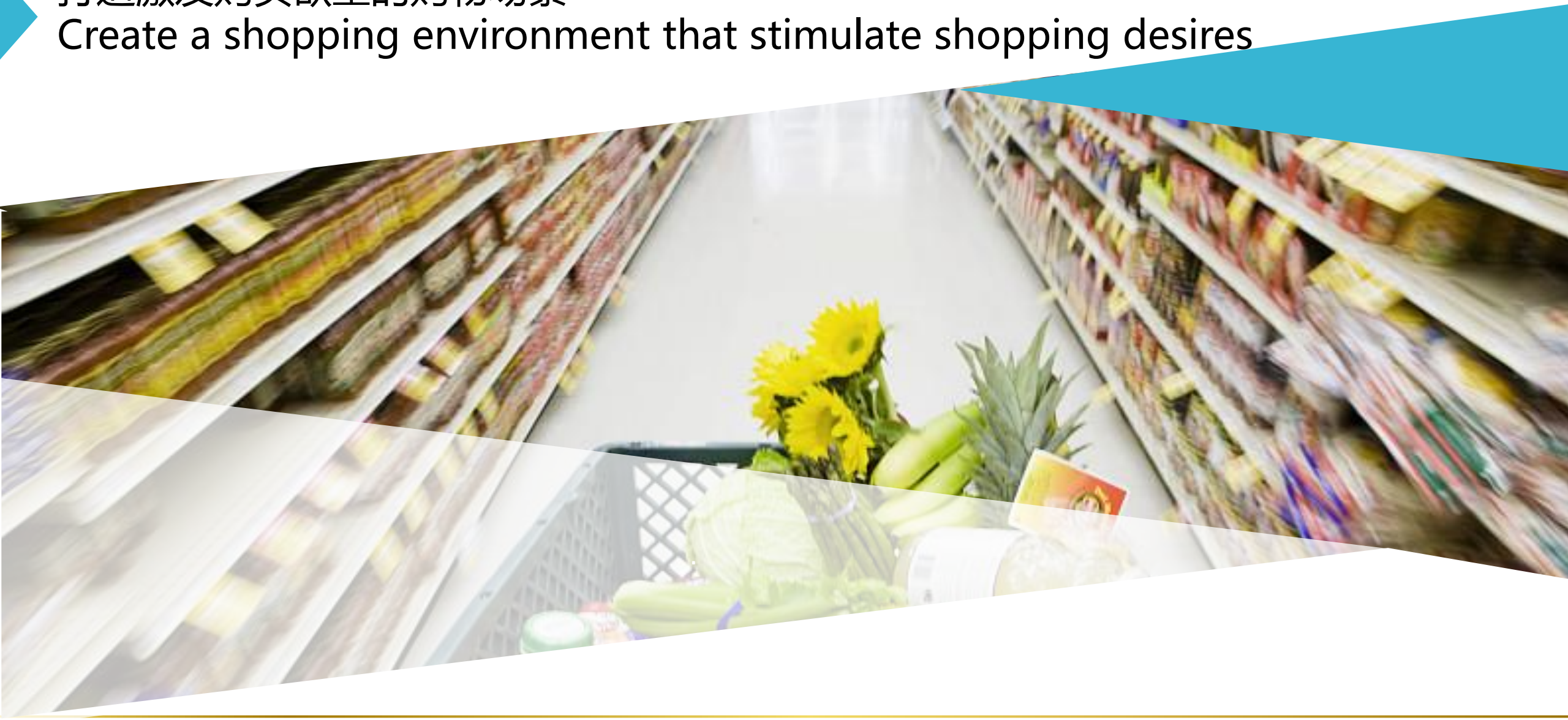
通过与卖家线上互动获得类似线下的客服体验
Tmall “BA online” overcomes the natural barrier of EC to offer virtual BA consultation.





线上肌肤诊断>
产品推荐
Online skin examination > Product recommendation

打造激发购买欲望的购物场景
Create a shopping environment that stimulate shopping desires



新零售时代如何实现增长呢？ How to grow in the“New Retail”era？

消费者是“新零售”的核心，只有以人为本，关注其需求才能实现增长
Take a consumer centric view in building activation and product development strategy

丰富**产品**线组合，深挖产品价值以满足消费者日益多元化/高度细分化的需求
Enrich product portfolio and uncover new product propositions to satisfying growing consumer sophistication

构建对消费者更友好的 “互联网+”**场景**，促进购买
Build superior shopping experience through empowerment of technology and insight

KANTAR WORLDPANEL

a **CTR** service in China



THANKS!