KANTAR WORLDPANEL

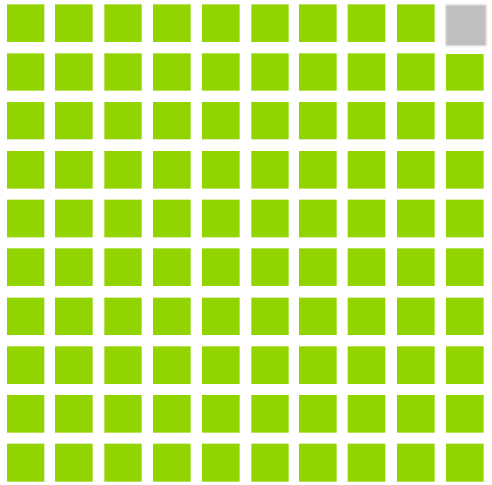
a CTR service in China

如何解决促销难题？
How to solve a problem like promotions

WINNING THE FUTURE

几乎所有人都买过促销的快消品，近一半的购物篮中包含促销的产品
Everyone buys on promotion and nearly half of any trip includes at least one

99%

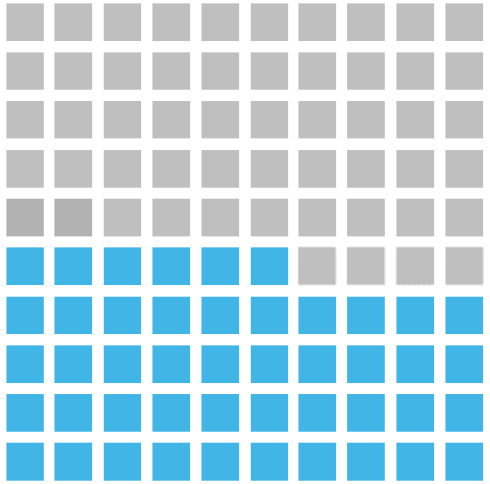


FMCG SHOPPERS

bought promotional product

快消品购物者中买过促销产品的购物者

46%

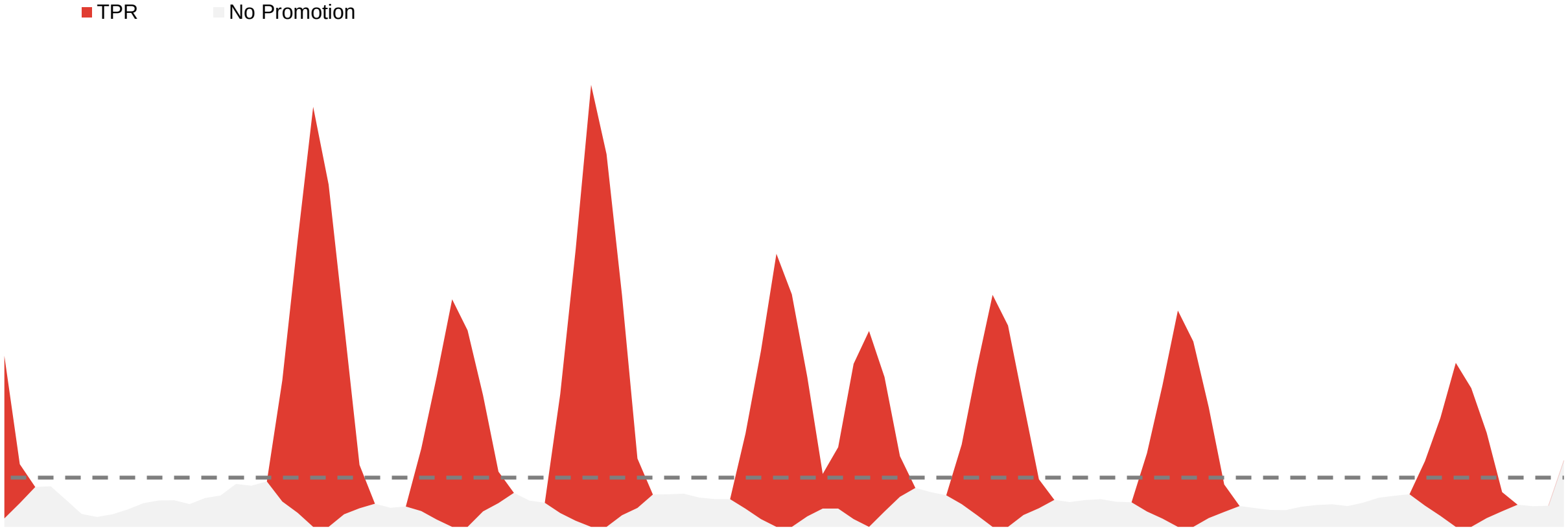


FMCG TRIPS

involved promotion product

快消品购物篮中含有促销产品的购物篮

然而，促销并不能带来长期的渗透率提升
Promotions do not boost long term penetration growth



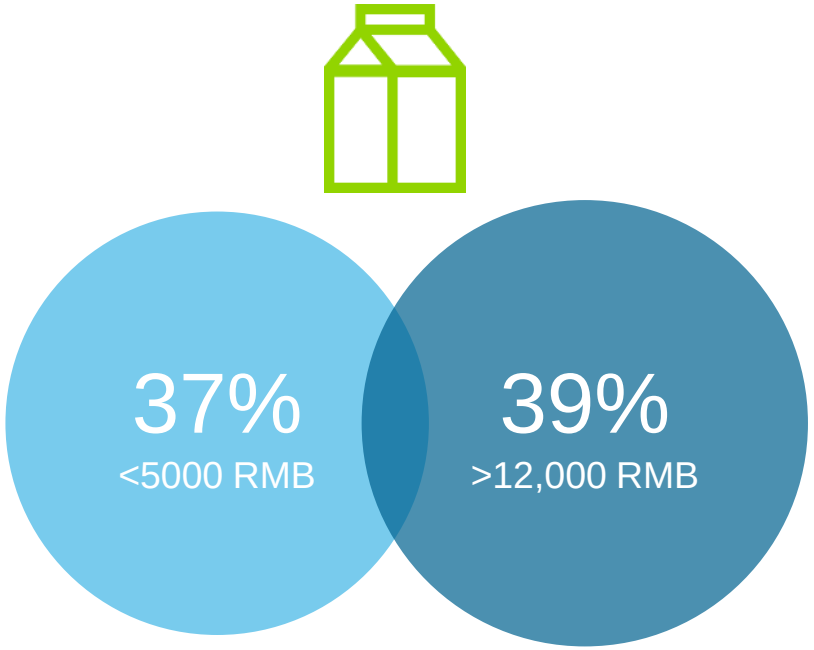
I C B I N B Buttery Spreads 500 Gm - Total Tesco - Volume

大量的促销将快消品购物者影响成了促销喜好者，优先追逐促销
This is as we have trained our consumers in FMCG to be deal hunters who are loyal to deals first

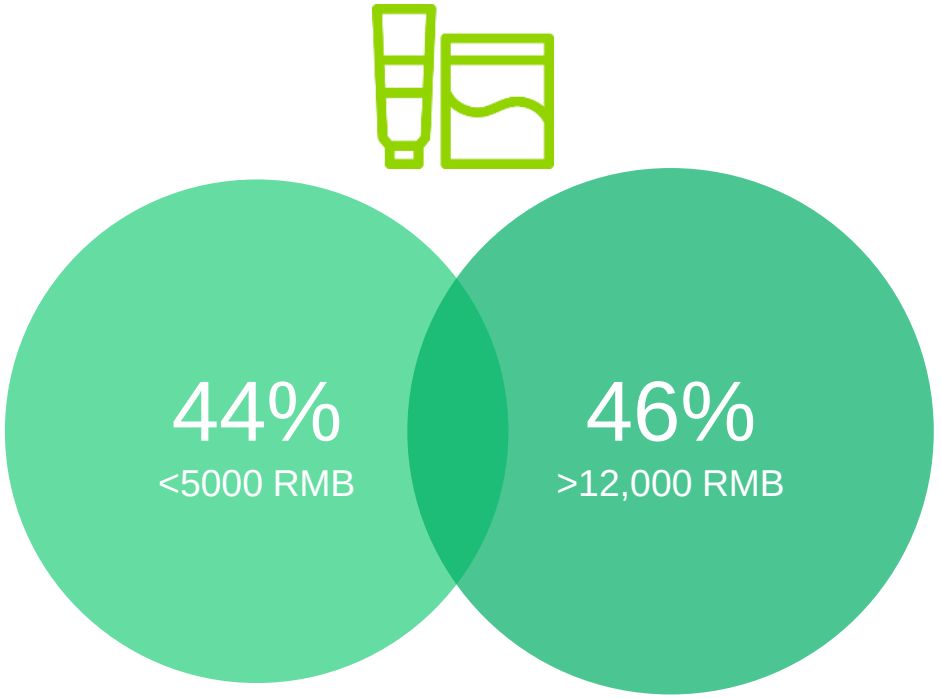
在中国主要促销的品类中，50%的购物者都是喜爱促销的购物者

50% of Chinese buyers were deal hunters in some key promoted categories

这里是关于消费态度，而不是消费能力
It is about attitude and not about affordability for most consumers



乳品- %
Dairy- % Deal Hunters



头发护理 大卖场- %
Haircare Hyper- % Deal Hunters

65 : 24

促销不断增加的情况下

65%的机会增加品牌份额

65% chance of growing brand share when escalating promotions

(based on % volume on promotion)

促销不断减少的情况下

24%的机会增加品牌份额

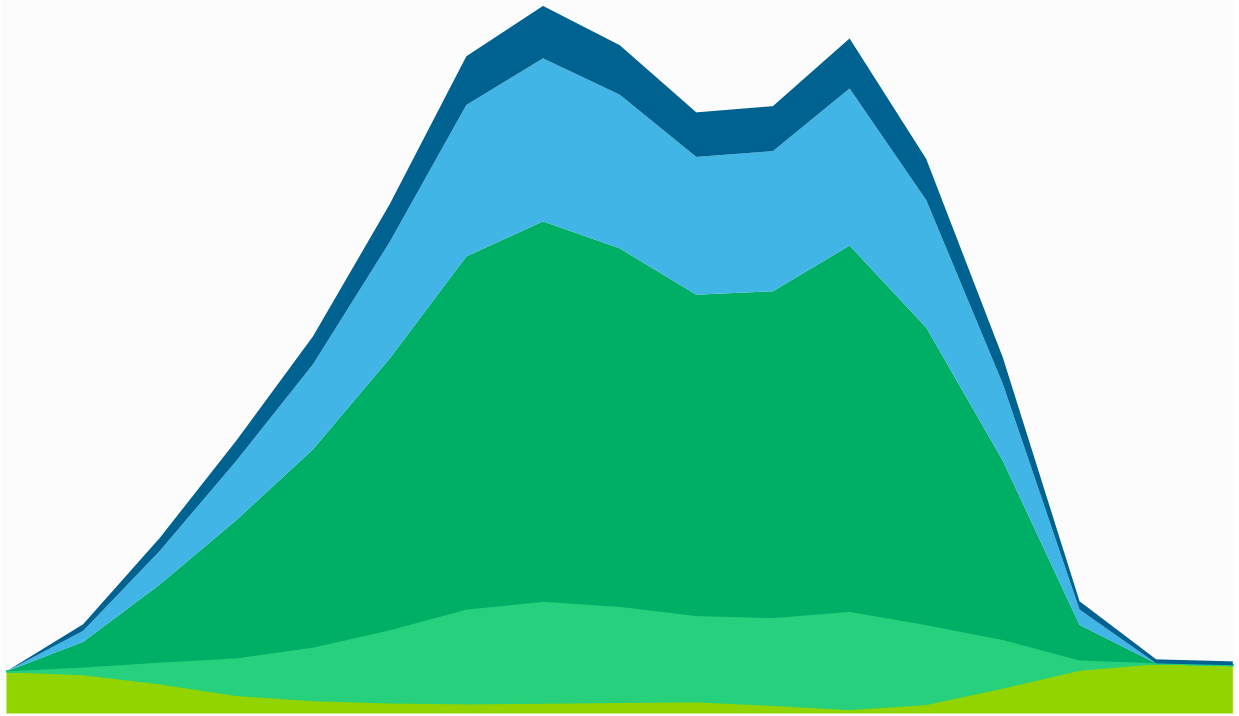
24% chance of growing brand share when de-escalating promotions

(based on % volume on promotion)

Based on study of 33,000 promotion events over 4 mega categories in China over 2016/2017

凯度消费者指数如何定义促销增量？
How do we define incremental sales?

销量来源分析
Source of volume decomposition



增量Incremental

现有购买者增加购买量/新购买者Extra trips/Expansion
Bigger purchase than usual/additional unplanned purchase

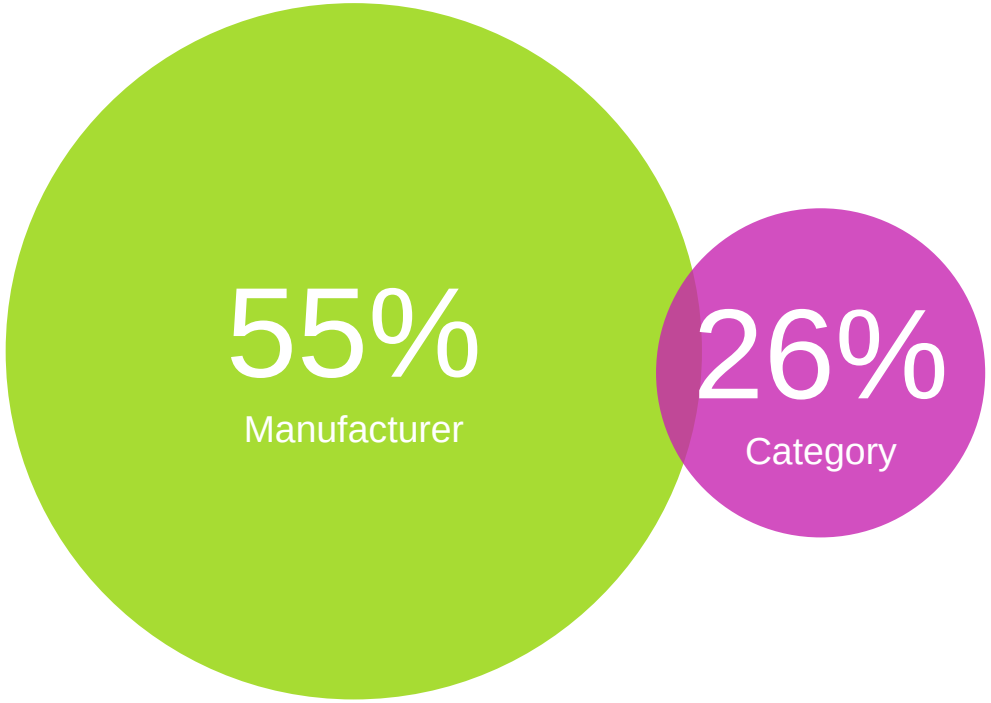
转化竞品Switching
From competitor lines

非增量Not incremental

品牌自身蚕食Cannibalised
From Manufacturer’s lines

提前预支销售Subsidized
Steal from future sales

促销带来了品牌和品类短期增量的增长
These buyers help boost short term incremental sales to manufacturer and category



促销销售中增量占比
% of promotional sales that are incremental

Data source: Kantar Worldpanel China 33304 promotional events, 2016

挑战
如何让促销的增量最大化
The challenge is therefore how to make your promotions as incremental as possible

影响促销增量的三大类因素
We approach promotions within 3 groups of Levers that could determine Promotion Incremental sales

产品 Product

- 品牌Brand
- 产品功能Product Function
- 产品定位Brand Price tier
- 包装尺寸Product Pack size

方式 Approach

- 促销方式Mechanic
- 促销力度Discount Level
- 促销时长Promotion Length
- 促销频次Promotion Density
- 基础价格Base Price
- 促销价格Promoted Price

情境 Context

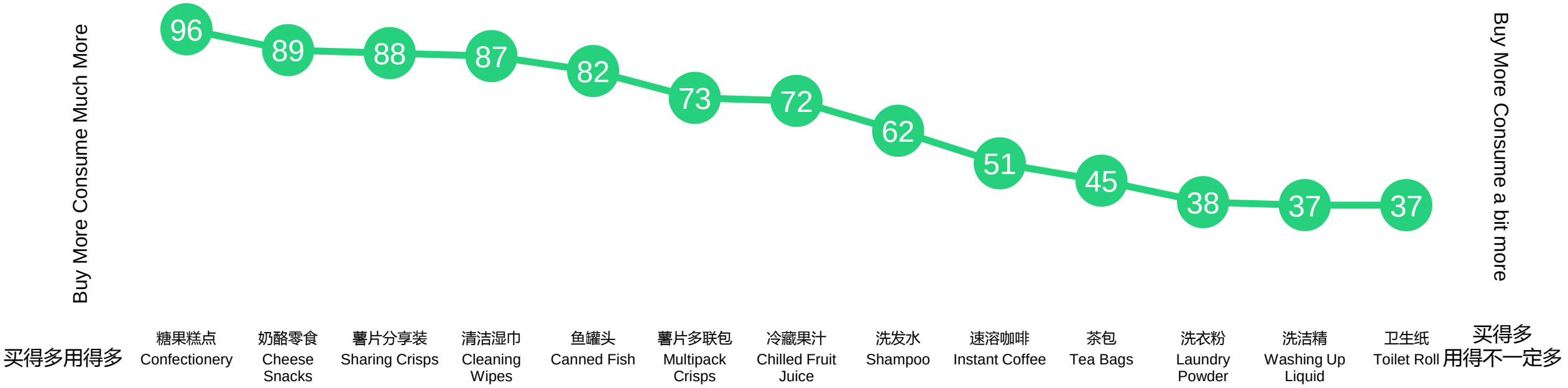
- 地区Region
- 渠道Channel
- 零售商KA
- 季节、节庆Season(CNY, Labor's day, MAF, National Day, Xmax, etc)

用产品扩张性研究，找出增长品类整体销量的产品
Expandability can help us see which products can grow category volume

冲动型和通用型
Impulsive & Versatile

稳定型
Staples

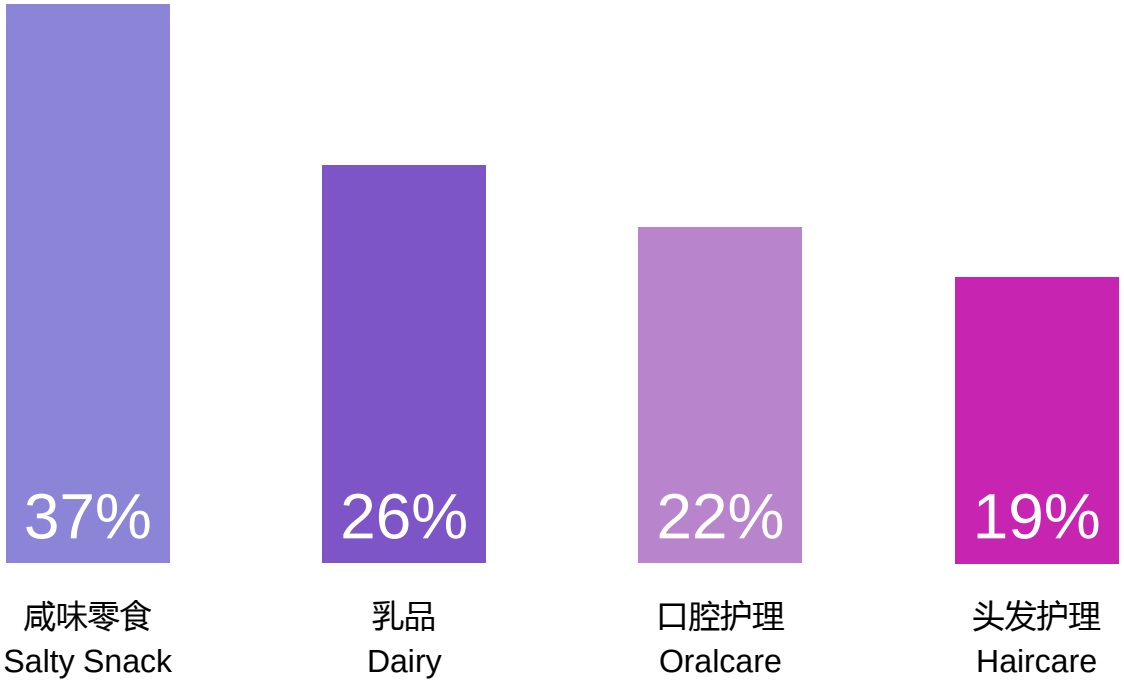
有限型和控制型
Restricted utility & Portion controlled



EXPANDABILITY - SEPTEMBER 2010，UK

产品扩张性，如咸味零食可以给品类带来最高的增量
Expandability effect can be seen as snacks has highest incrementality

不同品类促销带来的品类增量占比
% of promotional sales that are incremental to category



Data source: Kantar Worldpanel China 61,342 Launches 2013 - 2015

这意味着捆绑和赠品有更大潜力
This means more potential for bundle and extra free packages

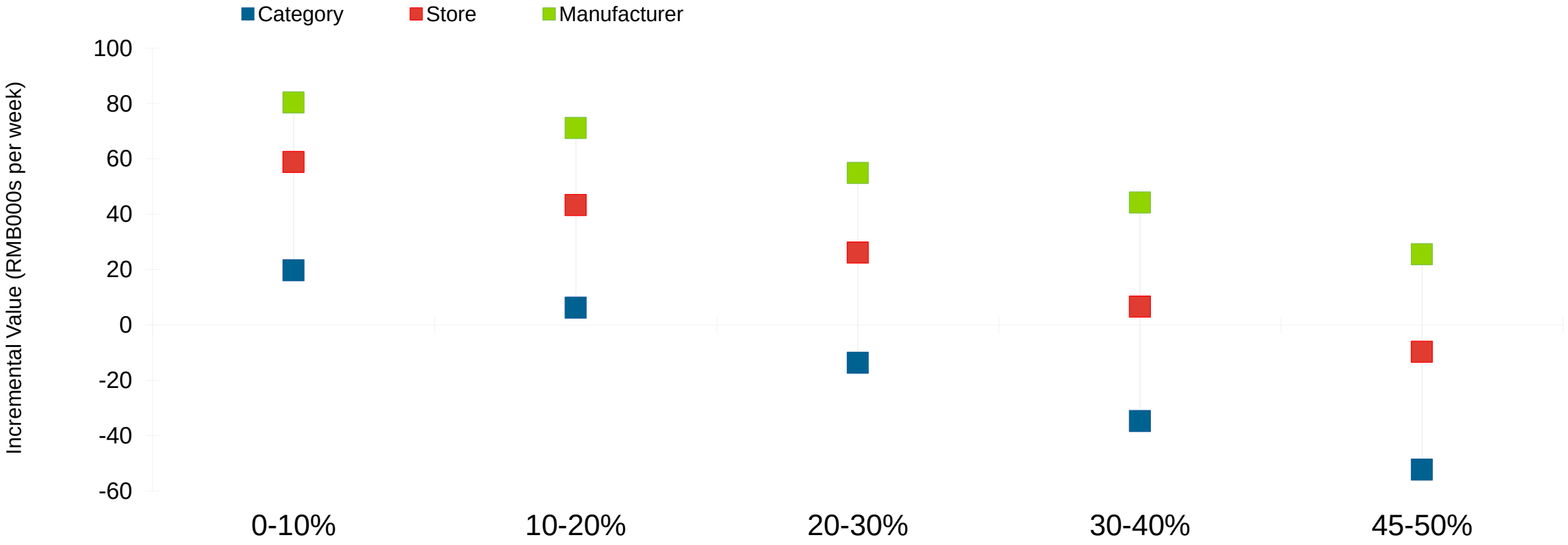
但是不同品类的包装尺寸和促销方式有很大差异

BUT we see big differences in pack sizes and mechanism by category

Data source: Kantar Worldpanel China 61,342 Launches 2013 - 2015

深度折扣同样也会伤害零售商
High discounts can also hurt the retailers

头发护理



Data source: Kantar Worldpanel China 61,342 Launches 2013 - 2015

春节的乳品促销能比平时多15%增量

Dairy promotions in Chinese New Year are 15% more incremental than the rest of the year

春节期间，价格不总是首选因素；消费者希望给他人留下款待家庭，而不是一味省钱
Price not always right at CNY- Consumers looking to impress others and treat family rather than save are worth more to brands and retailers

选择巧克力的四大主要原因 4 top reasons for chocolate choice	每个购买者的花费 Spend per Buyer on category
1 家人朋友喜欢Family and friends like	76 RMB
2 物有所值Value for money	68 RMB
3 高档或者礼品装Premium or Gift pack	73 RMB
4 春节主题包装CNY themed pack	81 RMB

Data source: Kantar Worldpanel July ‘16, 433 sample, Chocolate at CNY

为促销策略寻找推动短期内增量提升的机会
Look to boost incremental sales in short term for your promotion strategy

了解您的品类
Know your category-

Expandability can mean more potential for volume over TPR, but exact mechanics change by price tier and category

折扣力度需因品类而异

Discount level based on different category

春节期间的加量促销比短期价格促销更能给品类带来增长

Volume promotions at CNY over TPR can grow category

促销模拟分析，
帮您优化促销

Promotion simulation
helps you optmize
your promotion plan.

KANTAR WORLDPANEL

a **CTR** service in China

THANKS!