新零售驱动
增长力引发的
购买决策旅程变革

Transforming Purchase Decision Journey to Power Growth in New Retail Landscape

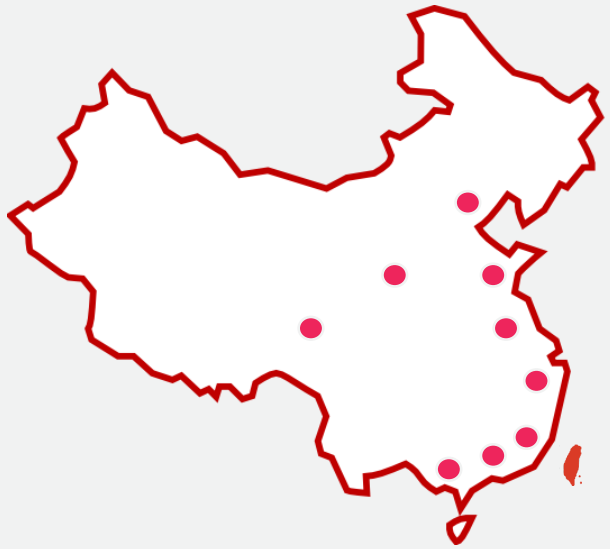


消费者已赋予在任何场景任何时刻进行购买的能力，品牌准备好在最关键时刻影响他们的购买吗？

Shopper are buying anytime anywhere now, are brands ready to influence their purchase decision at the right moment ?

中国零售市场的演变
China Retail Landscape Evolution

卖 Sell
1970-1995



迈 Scale
1995-2015



脉 Data
2015-20??



电商 eTailer
诉求：围绕超级平台建立生态圈

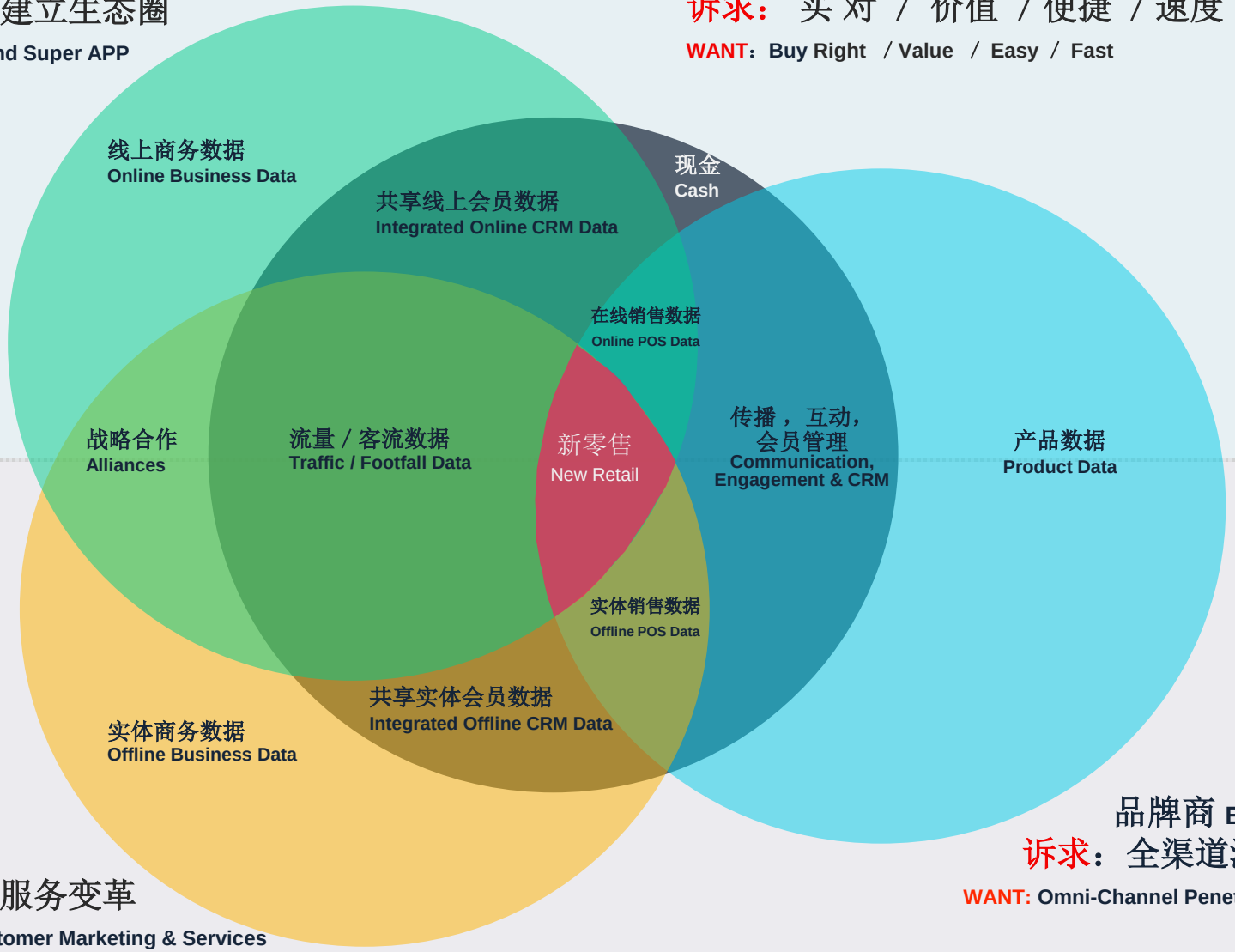
WANT: Create Ecosystem around Super APP

消费者 Shopper
诉求： 买 对 / 价值 / 便捷 / 速度

WANT：Buy Right / Value / Easy / Fast

线上 Online

实体 Offline



零售商 Retailer
诉求：数字化推广与服务变革

WANT: Digitally Transform Customer Marketing & Services

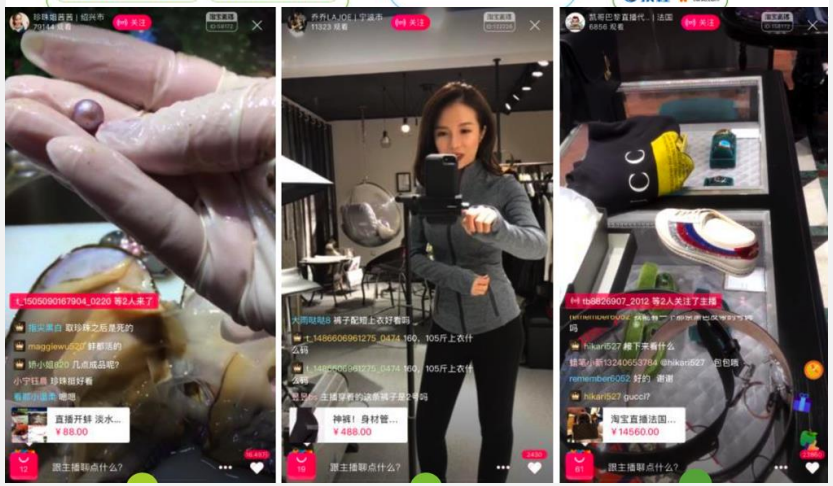
品牌商 Brand
诉求：全渠道渗透

WANT: Omni-Channel Penetration

社交购物密码破解！
Social Selling Code Cracked！

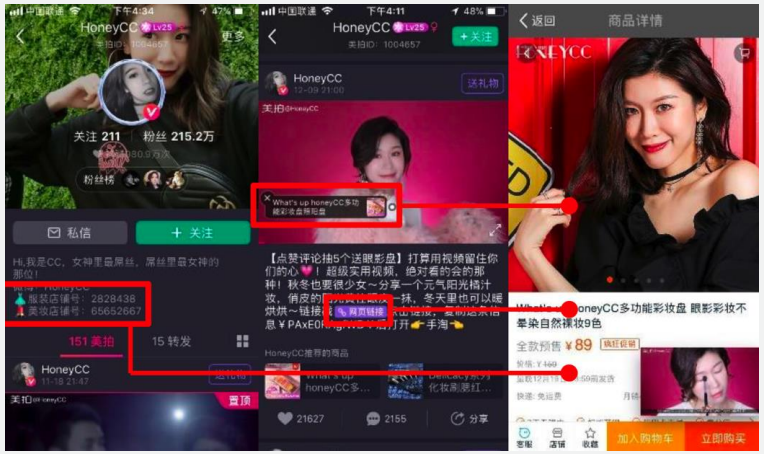
直播 Live Streaming



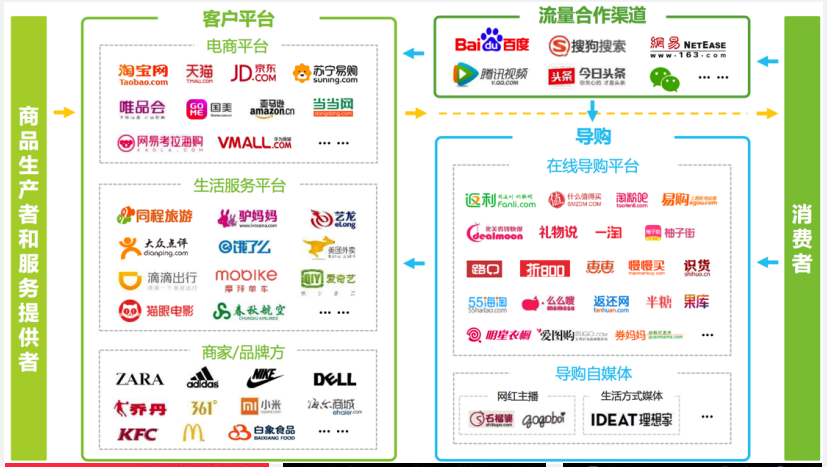


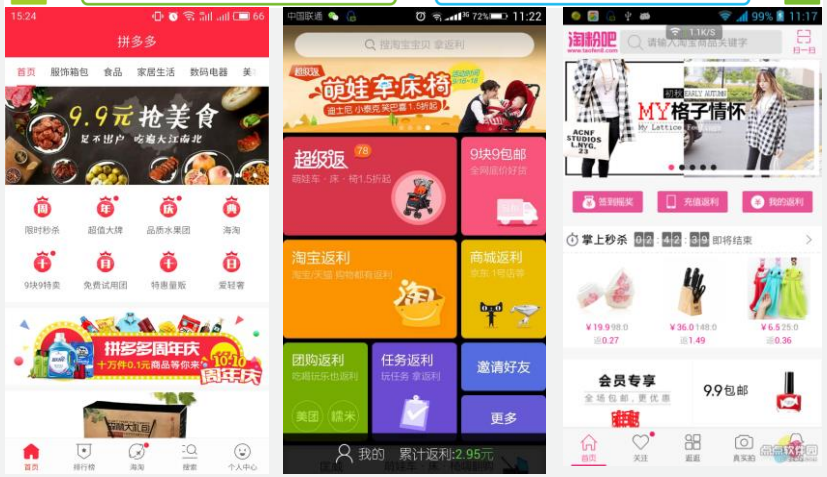
短视频 PUGC/UGC





拼团 / 返利 Rebate





移动三重威胁
Mobile Triple Threat



支付 Payment

62% 用于在线支付
62% online payment



查询 Research

44% 用于产品查询
44% product search



比价 Shopping

38% 用于价格对比
38% comparing prices

Source: PwC , Total Retail 2017 Global

数字变革放大了矛盾，同时也带来巨大商机

Disruption brings complexity, but also immerse opportunities



中国消费者信心指数创10年新高
China Consumer Confidence Index at 10 year peak

104



Yr. 2010

115



Yr. 2018 EoQ1 YTD

Source: Nielsen CCI

到了2020年，家庭消费支出成长 +46%

Household consumption growth to increase by 46% by 2020

人民币 18,489



Yr. 2017

(+68% vs Yr. 2014)

人民币 26,999



Yr. 2020 est.

Source: National Bureau of Statistics (NBS), China Daily, Xinhua Net, Commerce Ministry

到了2020年，总零售销量成长 +30%

Total Retail Sales to increase by 30% by 2020

人民币 38.7万亿



Yr. 2017

(+110% vs 2010)

人民币50.9万亿



Yr. 2020 est.

Source: National Bureau of Statistics (NBS), China Daily, Xinhua Net, Commerce Ministry

到了2020年，在线零售销量成长 +45%

Online Retail Sales to increase by 45% by 2020

人民币 7.4万亿



Yr. 2017

19.6% vs Yr. 2017 Total Retail Sale

人民币 11.1万亿



21.8% vs Yr. 2020 Total Retail Sales *est.*

Source: National Bureau of Statistics (NBS), China Daily, Xinhua Net, Commerce Ministry

到了2020年，移动零售销量成长 +76%

Mobile Retail sales by 76% by 2020

人民币4.7万亿



12.3% vs Yr. 2017 Total Retail Sales

62% vs Yr. 2017 Total Retail Sales (Online)

人民币 8.1万亿



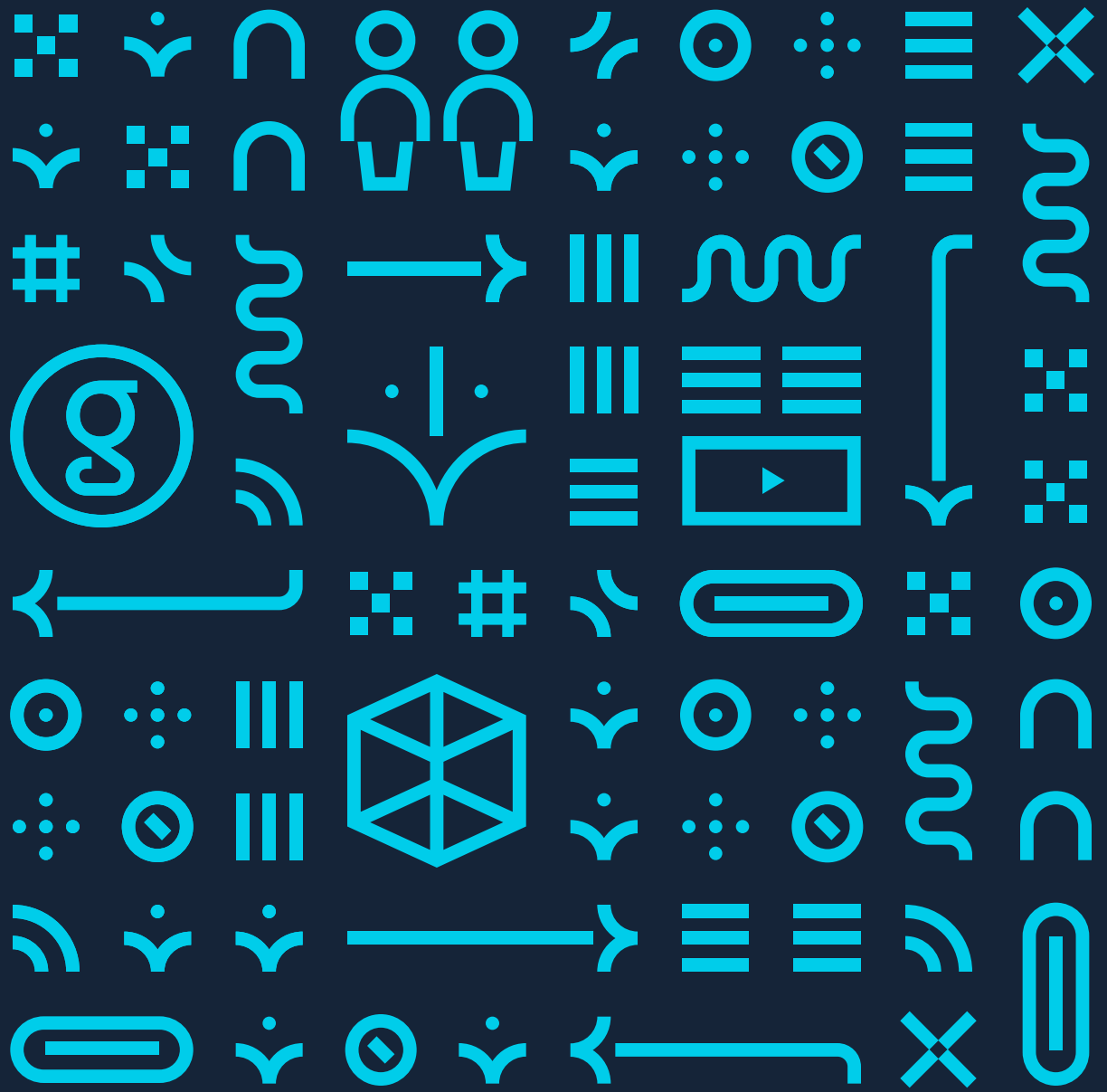
16.5% vs Yr. 2020 Total Retail Sales *est.*

75% vs Yr. 2020 Total Retail Sales (Online)

Source: National Bureau of Statistics (NBS), ChinaDaily, statistica

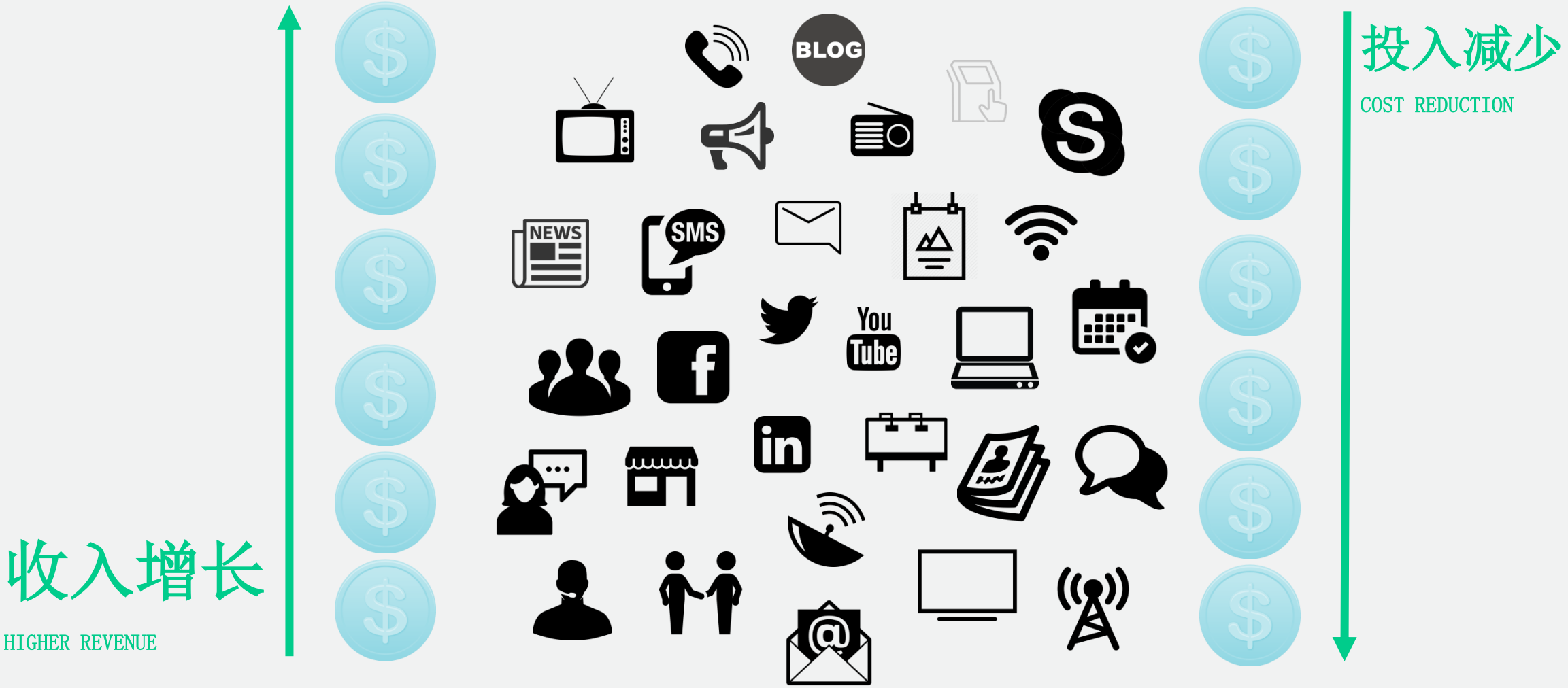
增长之路如何走？

Where to Invest for Growth?



这是一个不断演变而残酷的时代

The World Is Changing And Making Things Even Harder



收入增长

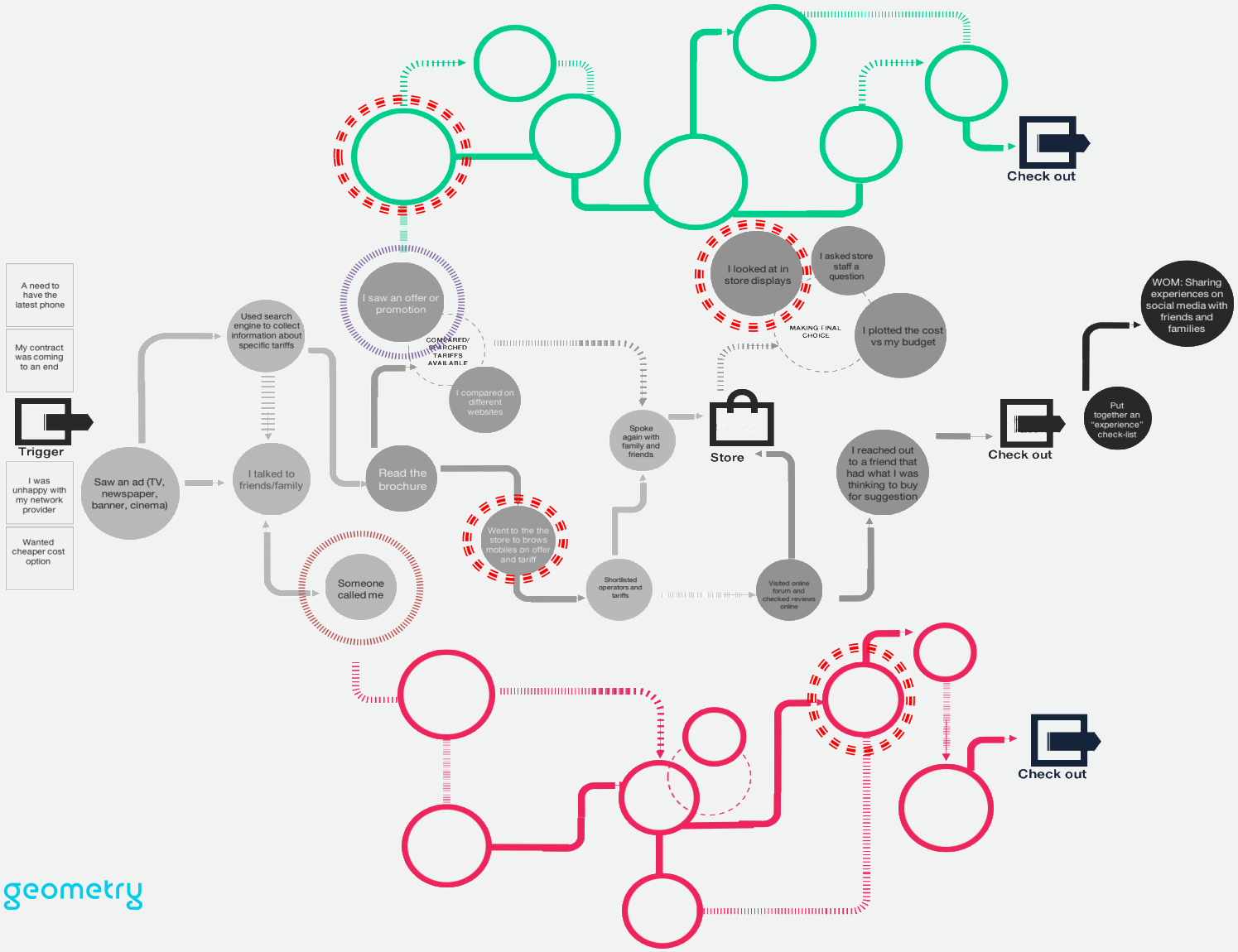
HIGHER REVENUE

投入减少

COST REDUCTION

多维度购买决策旅程

Multi-Dimensional Purchase Decision Journey – The WAR Canvas



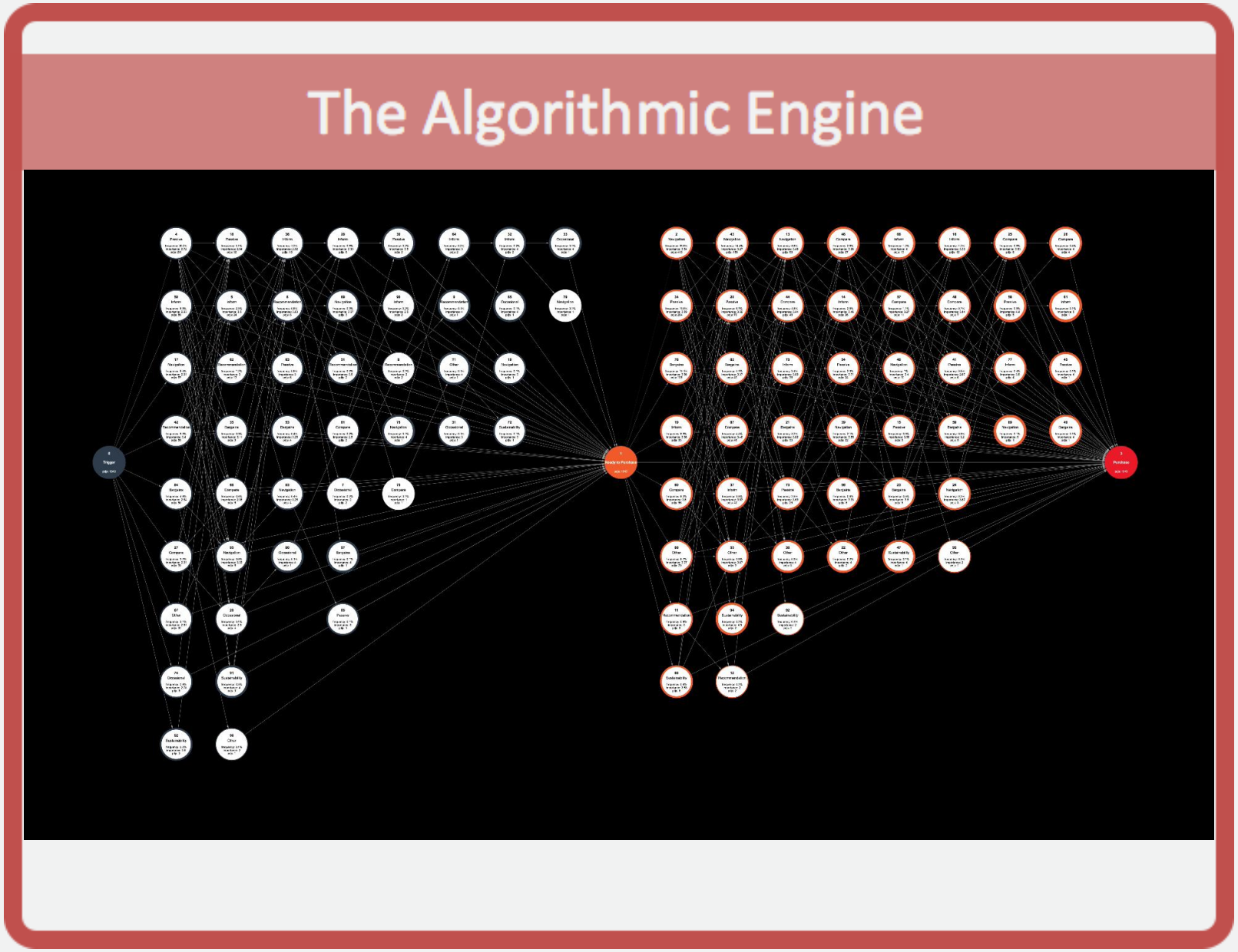
要赢这盘棋，只需要下对几步棋

To win the War, we need to win only a few battles

Pathfinder
智能大数据分析平台

计算程序可以分解几千个不同购买决策旅程，寻找出共通行为规律并完成重新创建标准购买决策旅程

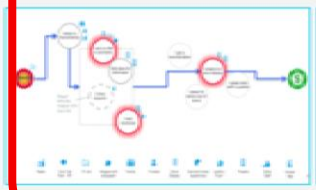
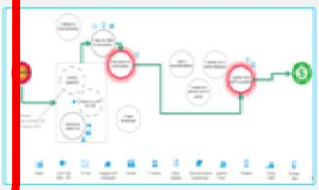
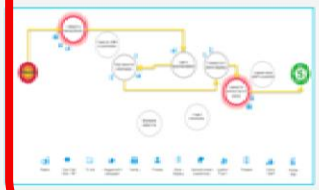
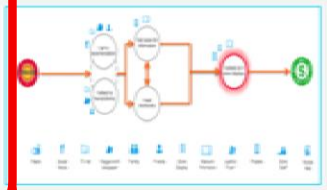
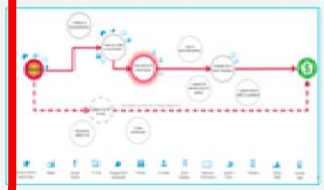
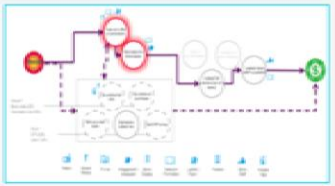
The algorithm in our Pathfinder tool takes the thousands of unique journeys and through pattern recognition builds a model of typical behaviors in a category.



南非电信行业案例
South Africa Telco Operator Case Study

高频替换倾向	合约期内替换	跨网替换	观察	网内低价续约	网内续约	合同续约
Super Switchers	Contract Connectors	SIM Surfers	Just Looking	Value Connectors	Repeat Loyalists	Contract Keepers
 38.234.000 Euro	 30.000.000 Euro	 156.000.000 Euro	 54.000.000 Euro	 55.000.000 Euro	 233.000.000 Euro	 127.000.000 Euro
Will Switch at next available opportunity	Switchers on Contract	Switchers on SIM	Uncertain (multiple consideration)	Renewed SIM (single consideration – Low Loyalty)	Renewed SIM (Single consideration – High Loyalty)	Renewed contract
size of segment	7.4%	5.5%	22.6%	7.9%	17.6%	26.9%	12.2%
用户数量	2.548.980	1.903.932	7.827.276	2.729.316	6.103.680	9.335.856	4.237.896
Conversion rate	8%	5%	7%	11%	3%	2%	1%
转换率							

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Will Switch at next available opportunity	Switchers on Contract	Switchers on SIM	Uncertain (multiple consideration)	Renewed SIM (single consideration – Low Loyalty)	Renewed SIM (Single consideration – High Loyalty)	Renewed contract
						

购买决策旅程

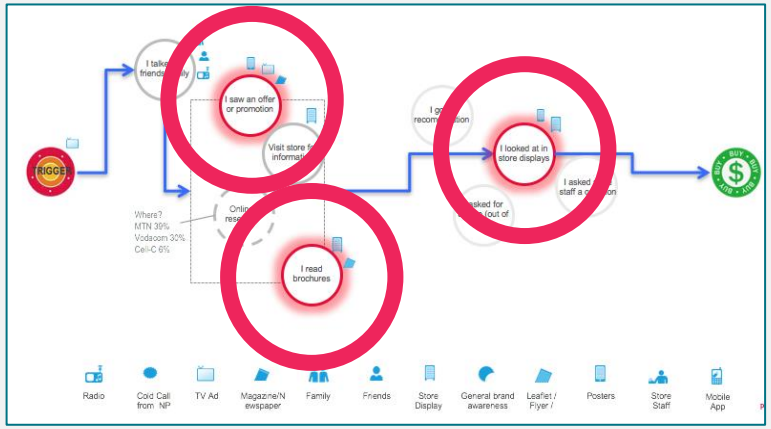
南非电信行业案例
South Africa Telco Operator Case Study

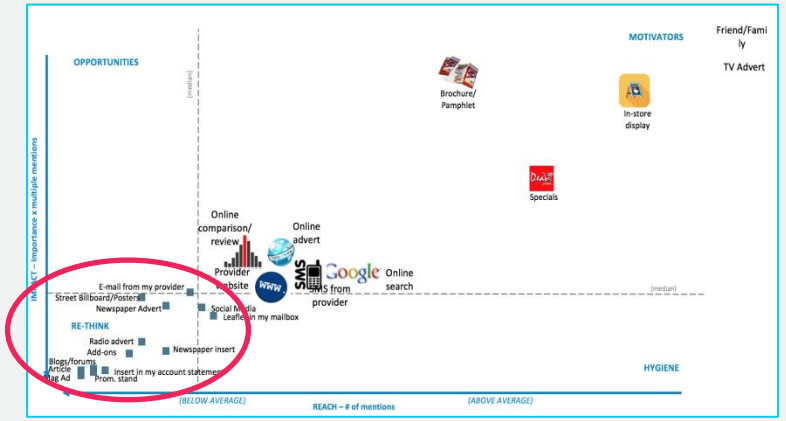
高频替换倾向

跨网替换

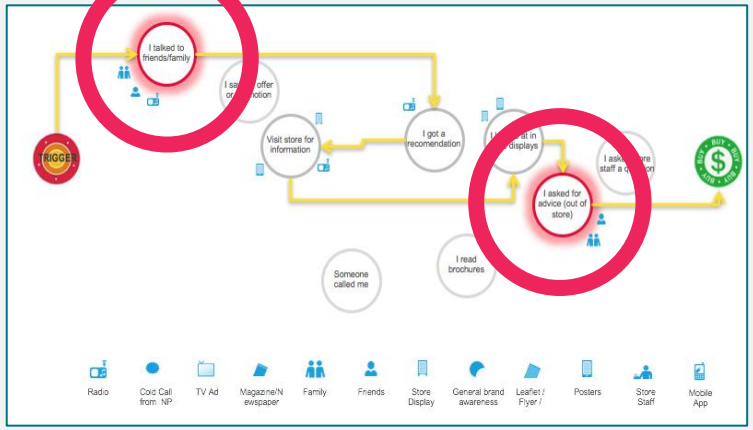
观察

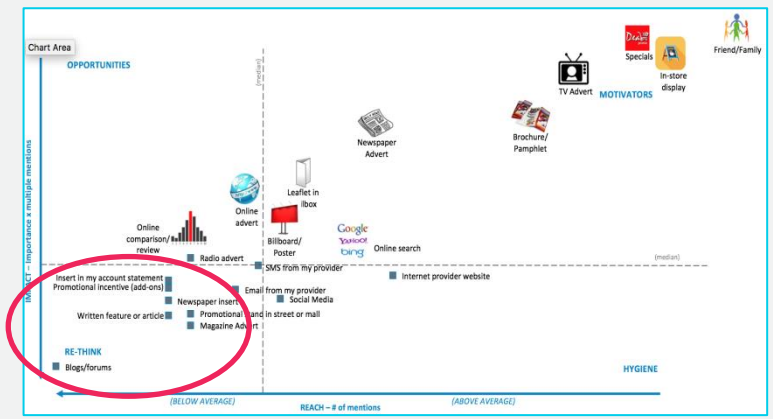
Super Switchers



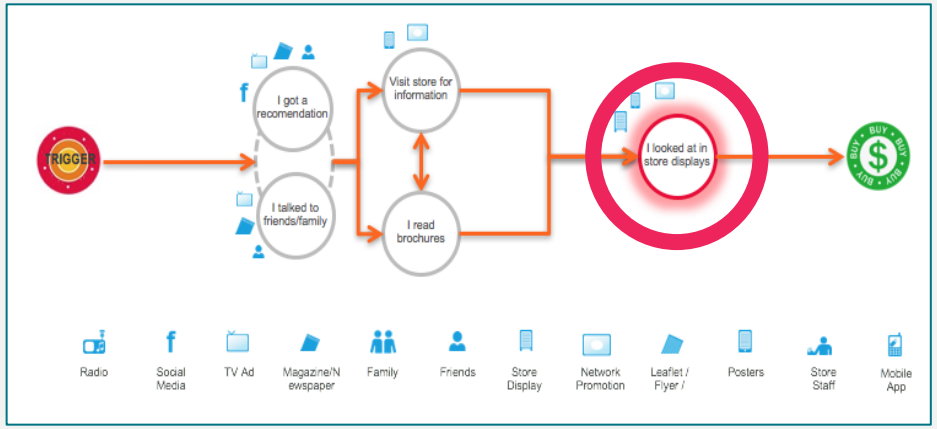


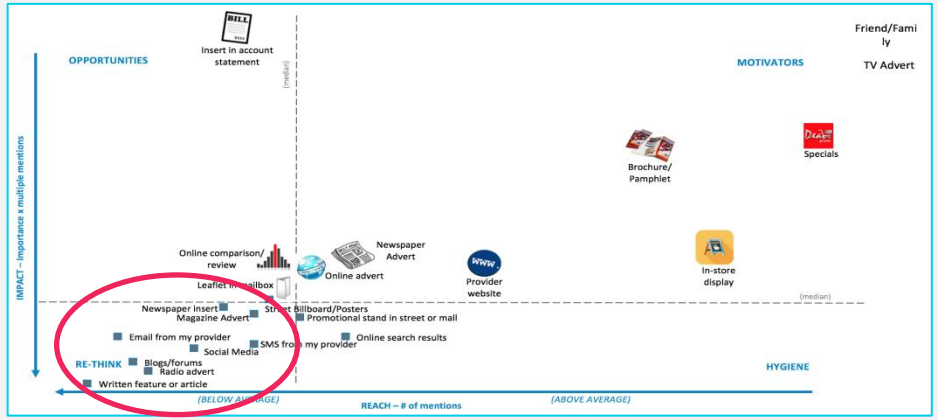
SIM Surfers

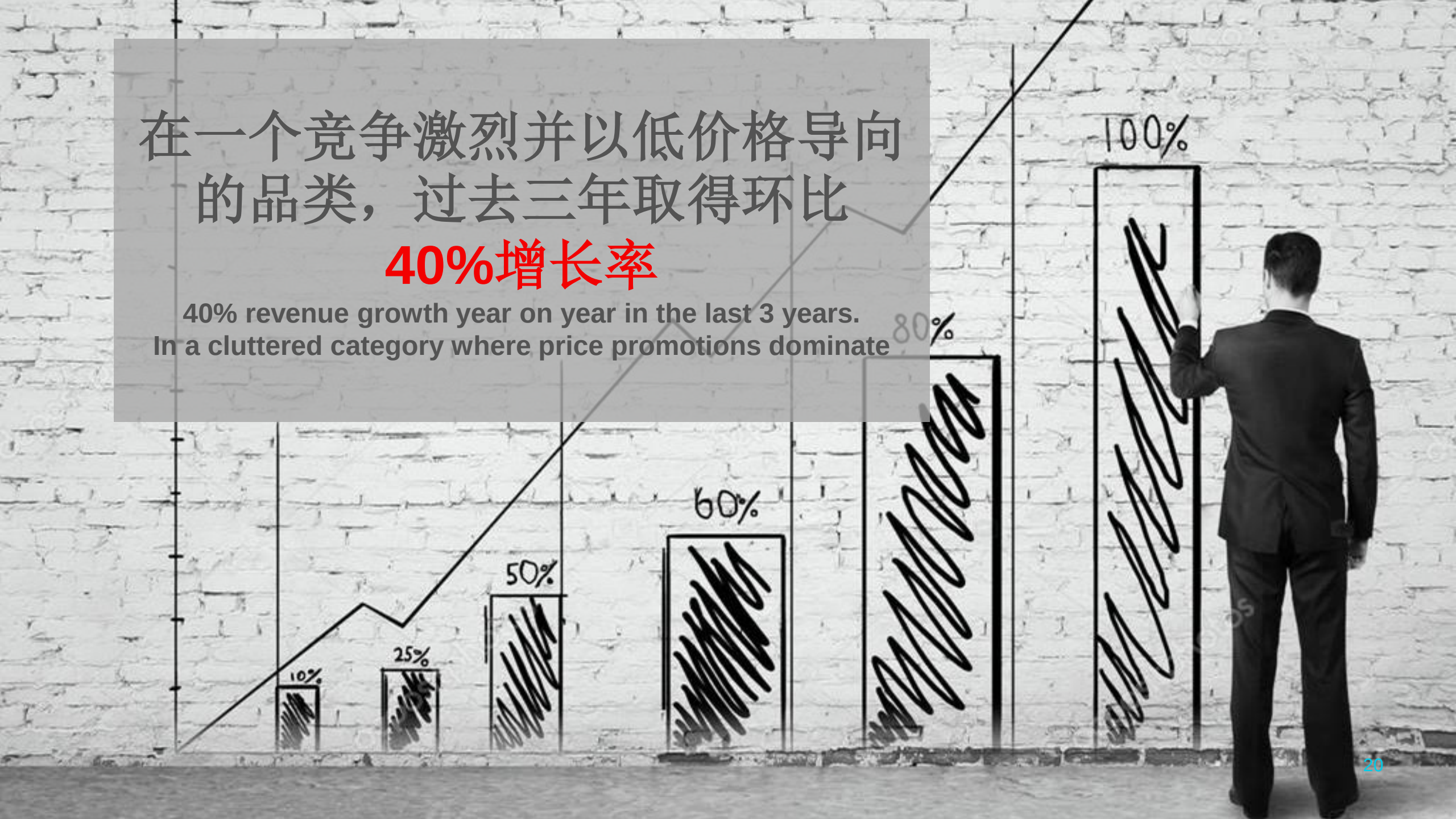




Just Looking

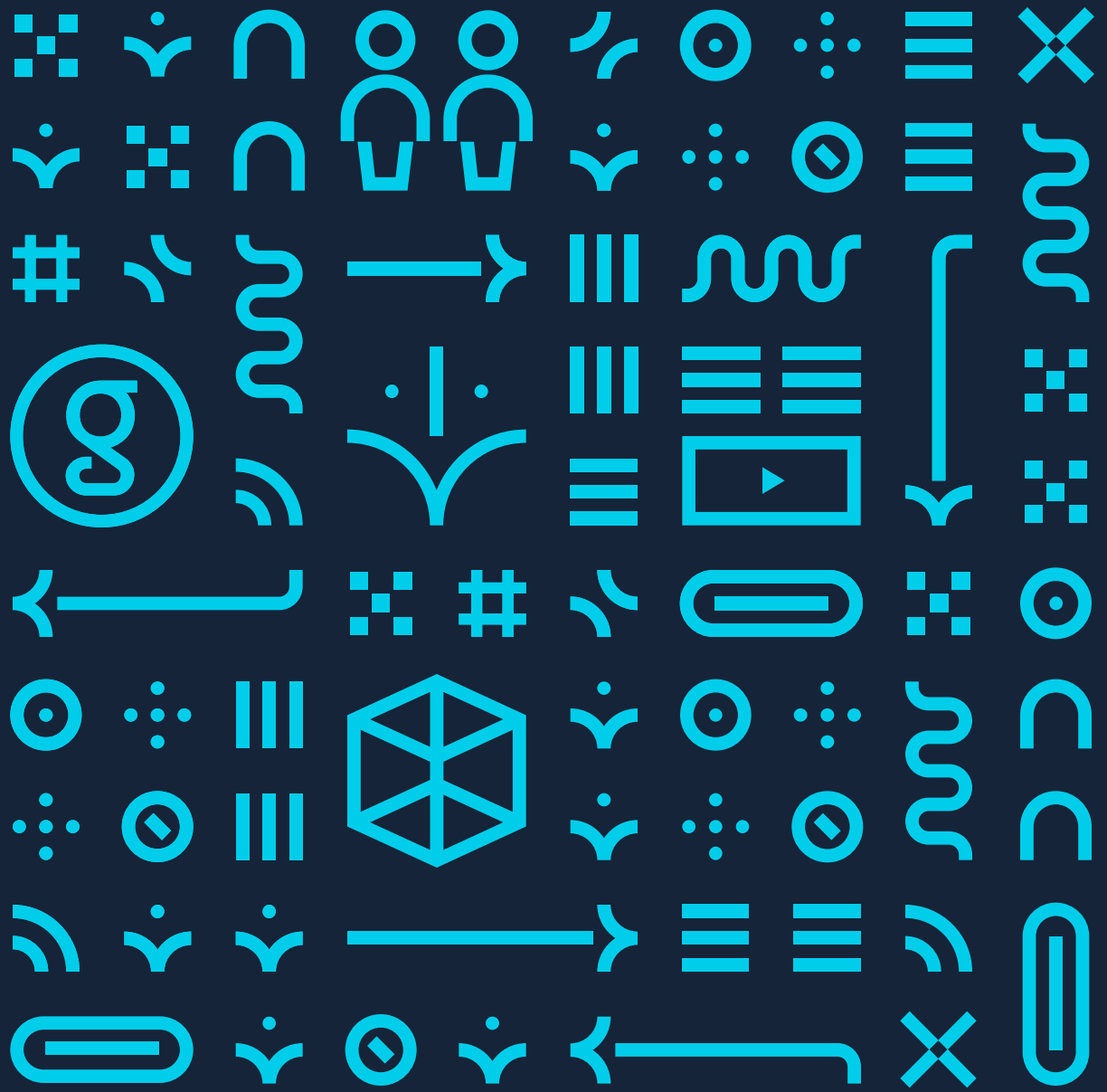





在一个竞争激烈并以低价格导向的品类，过去三年取得环比
40%增长率
40% revenue growth year on year in the last 3 years.
In a cluttered category where price promotions dominate
10%
25%
50%
60%
80%
100%

我们都是下一个
零售变革的见证人

We Are All Witness To The Next Retail Revolution



今天的市场领导者
Leaders of TODAY

渠道关系 Relationship

全国覆盖 National

高质量执行 Quality

销售激活 Sales Activation

店内激活 In-store Activation

项目制 Campaign

数据饥渴 Data Hungry

数据及时 Timely Data

数据隔离 Data Silo

数据智慧 Data Smart

画像管理 Profile

人才 Skilled Talent

增长
Growth

明天的市场领导者
Leaders of Tomorrow

渠道合作 Partnershp

技术覆盖 Technology

O2O 执行 O2O

销售可追踪 Sales Track-ability

全渠道激活 Omni-channel Activation

不间断 Always-On

相关数据 Relevant Data

数据实时 Real-Time Data

数据融合 Data Integration

洞察智慧 Insight Smart

行为管理 Behavior

专才 Specialized Talent

变革再也不是一个选项，而是必修课

Transformation is not a choice, but a necessity

在变革的路上，经纬中国与你同行

Geometry working with you hand-in-hand through the transformation



购买决策旅程清晰化

Purchase Decision Journey Lock Down



技术工具场景化应用

Technology Application



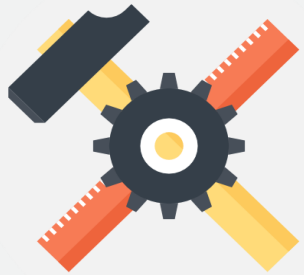
行业 / 品类数据分析

Industry / Category Insight Reports



有效影响行为创意方向

Creative Strategy Development



全国网络落地执行覆盖

National Execution Coverage

geometry



Thank You