

# KANTAR WORLDPANEL

A CTR SERVICE IN CHINA

## 后疫情时代 母婴增长新 机会

Unlock brand growth under the  
new normal

虞坚

凯度消费者指数大中华区总经理

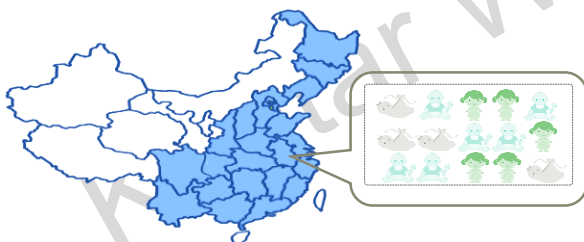
2020.10.09



# 凯度消费者婴童指数 – 360度洞察消费者全渠道购买行为

Kantar Worldpanel Baby+Kids Panel provides 360° understanding of consumers' omni-channel shopping behavior

## 研究0-6岁婴童 Baby/Kids age 0-6 years old



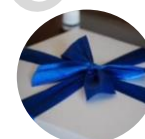
- 覆盖中国大陆城镇地区（不包含农村地区）
- Geographically cover urban China area
- 监测0-6岁婴童个体
- Track 0-6 years old baby/kids individual
- 连续性及及时地记录真实购物行为
- Continuously measure consumer purchasing behavior on real time basis
- 覆盖奶粉、纸尿裤、婴儿辅食、婴儿保健品、婴儿洗护产品、婴儿湿纸巾、儿童牛奶、儿童奶酪等。
- Cover IMF, diaper, infant food, nutrition supplement, baby toiletry, wiper, kid milk, kid cheese, etc.

## 连续监测购买行为 Continuous shopping behavior

- 为样本提供具备标准扫描流程的扫描仪/收集APP，用以手机数据
- Collect purchase data via scanner/mobile APPs
- 重点理解消费者的购买行为
- Provide insight on consumer shopping behavior



## 全渠道覆盖 Omni-Channel Coverage



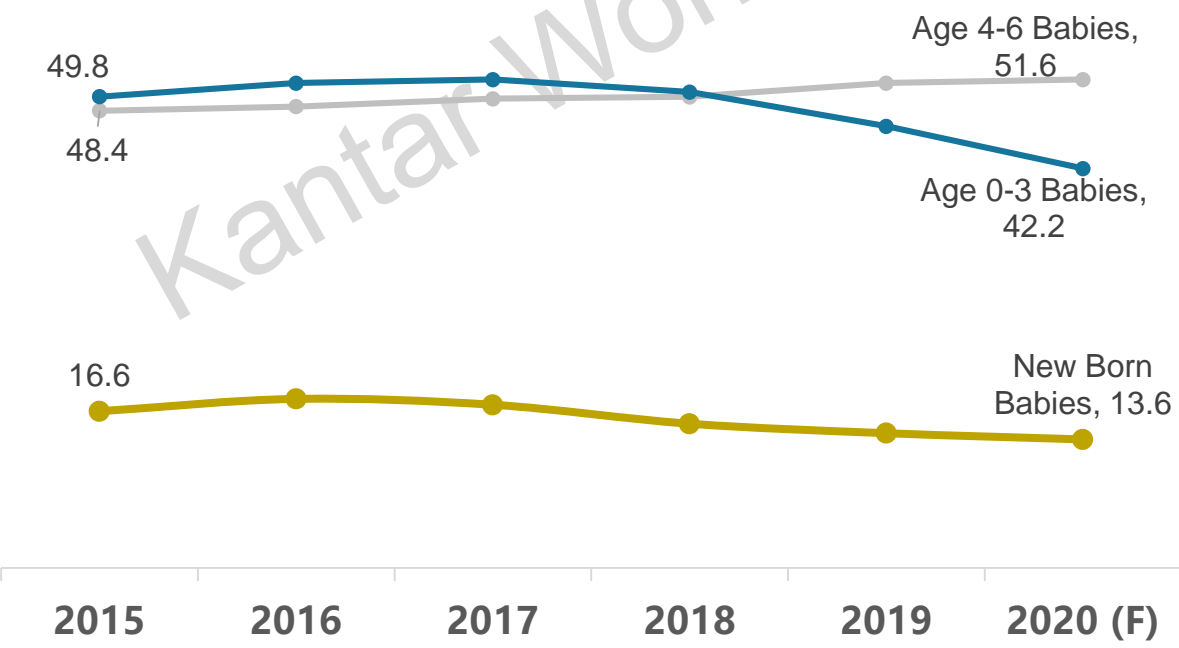
- 母婴店 MBS
- 大卖场 Hypermarket
- 超市 Super Market
- 百货公司 Department Store
- 医院 Hospital
- 药房 Drugstore
- 亲友赠送 Gift from Relatives
- 杂货店 Grocery
- B2C 电商
- C2C 电商
- 微信渠道 WeChat Purchase
- 海外购买 Oversea Purchase
- 直销 Direct Sales
- 其他 Others

# 出生率持续下降，母婴市场增长面临更大的挑战

BB population will continue to decline, with more challenge for baby category to grow

全国婴幼儿人口数（百万）

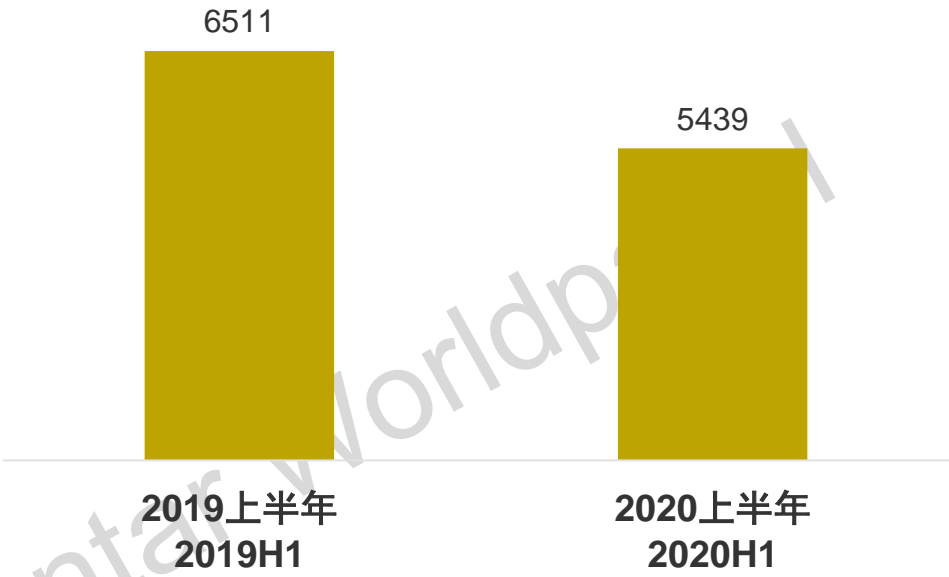
National Baby Population(Million)



数据源：国家统计局+凯度消费者指数2020预测  
Data Source: National Bureau of Statistics & Kantar Worldpanel forecast for 2020

“怀孕” 关键词百度搜索指数均值

“pregnant” Baidu Search Index



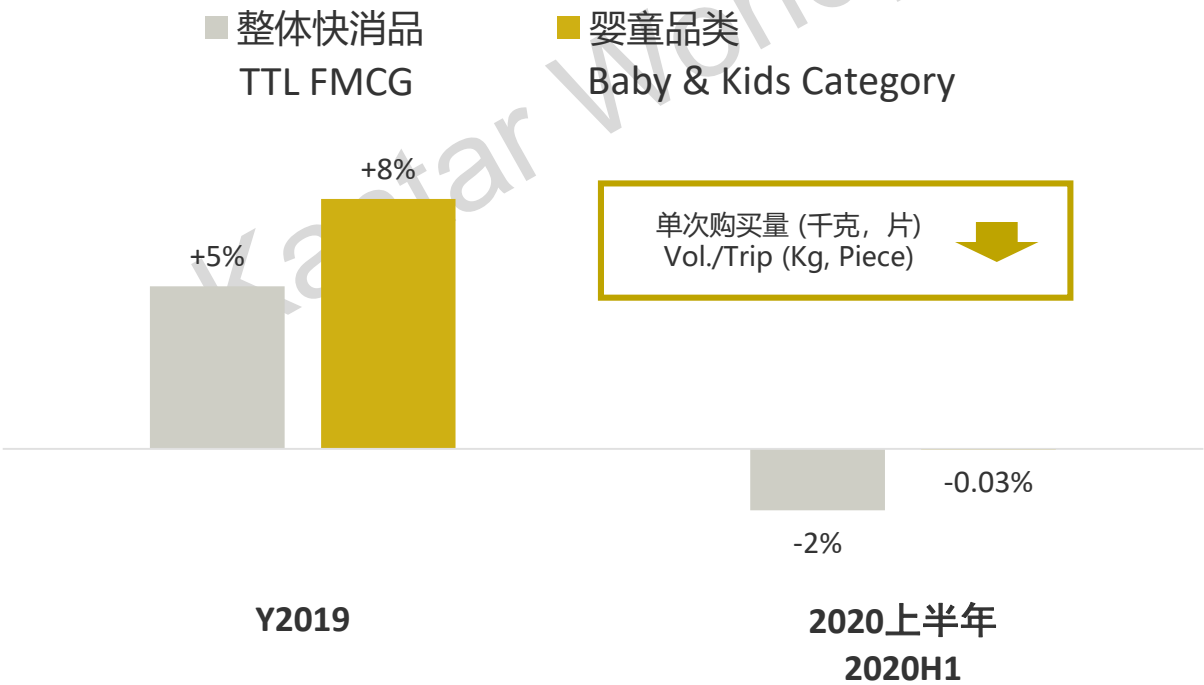
数据源：百度搜索指数。  
Data Source: Baidu Search Index

# 婴童品类同样受新冠疫情影响，疫情期间购买量减少

Baby category performance was negatively impacted after COVID-19, mainly due to less trip volume

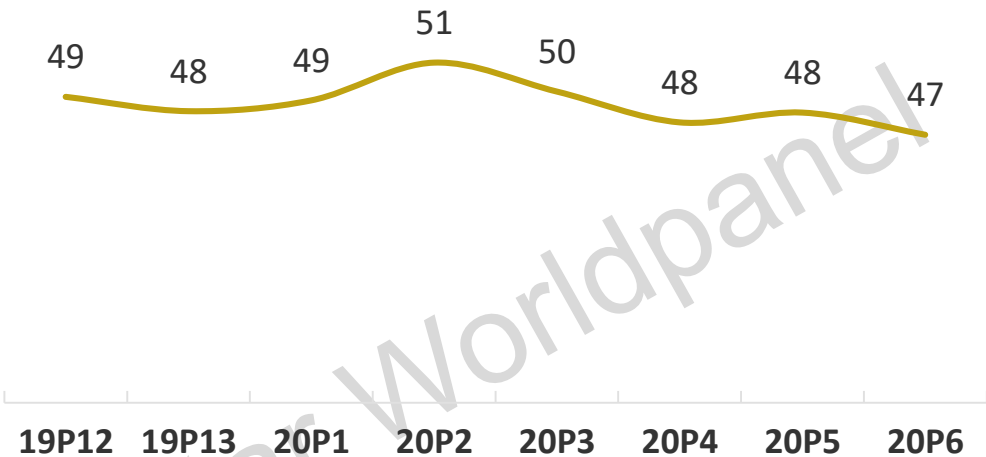
## 品类销额增幅%

Value. GR% VS Y.A.



## 0-6个月宝宝纯母乳喂养率% (8周滚动)

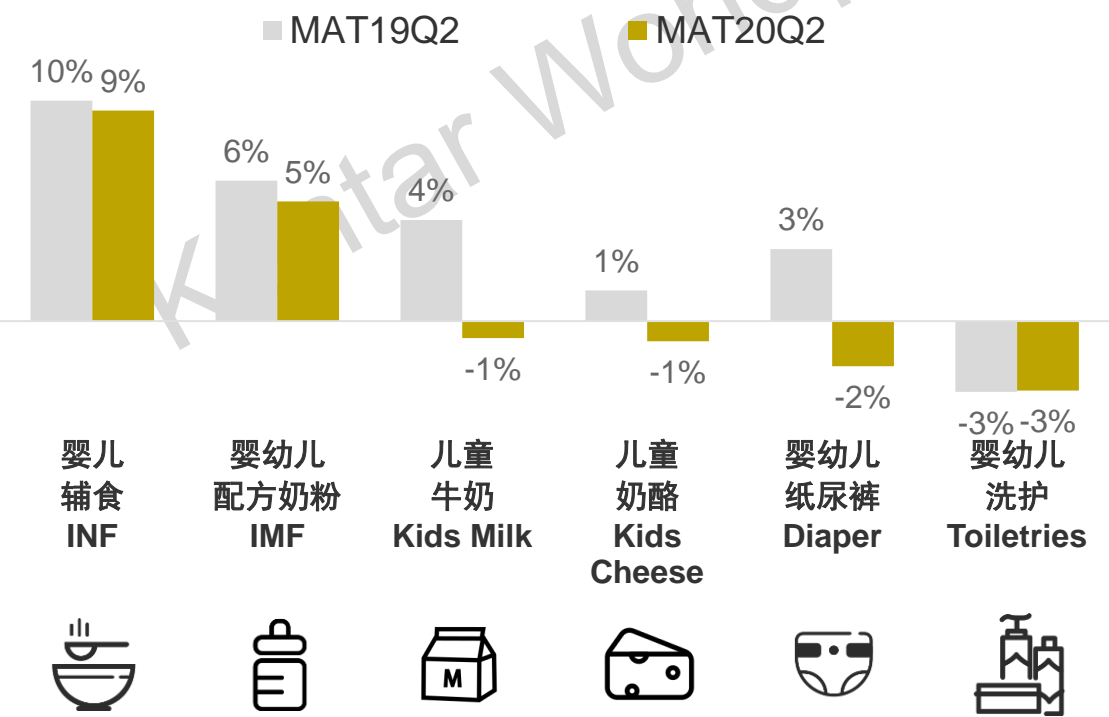
Pure Breast Feeding Rate (8 weeks rolling) among 0-6 Month babies, National China



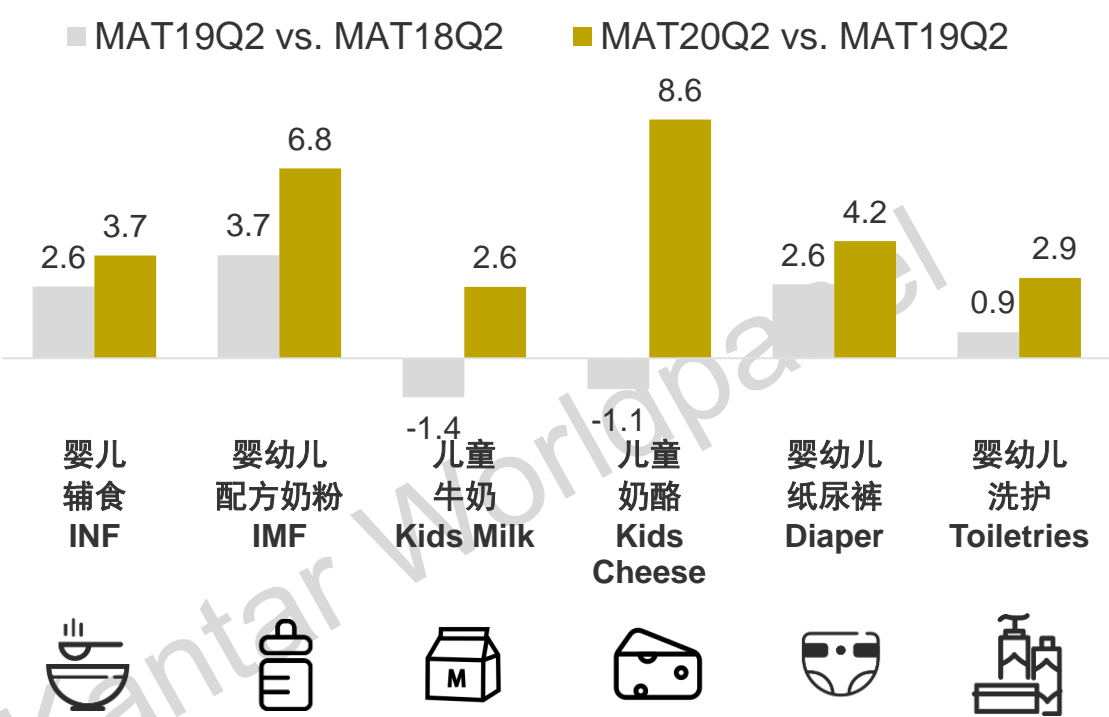
# 奶粉和辅食仍呈现高端化趋势，但消费者对价格更加敏感

Shoppers become more price sensitive while continue purchasing premier products

平均购买价格增幅  
Average Price Growth Rate



促销率变化  
Promotion Rate Change Point

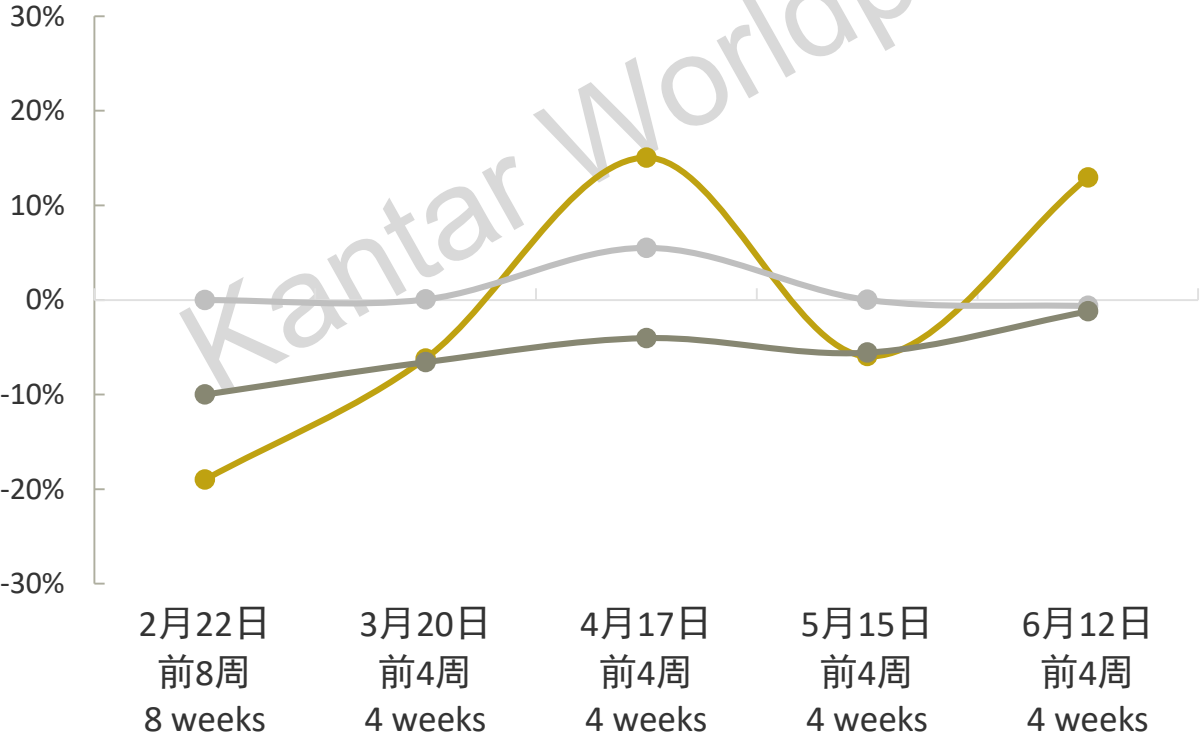


数据源：凯度消费者指数，婴童样组，0-6岁婴童，全国一到五线城市，2018P7-2020P6  
\*Data Source: Kantar Worldpanel, Baby & Kids Panel, Urban China, 0-6 yrs, 2018P7-2020P6  
\*婴幼儿洗护包括婴幼儿洗发水，沐浴露，润肤霜，爽身粉，牙膏。  
\*Baby toiletry includes baby wiper, shampoo, personal wash, body care, body chill, dental care.

# 疫中各子类步调各异，疫后均已展现回暖趋势

Recovery trend is going on while pace are different across sub-categories

婴童快消品各组同比销额增幅  
Baby & Kids Sub-Category groups Val GR%



● 增长品类 Booming Categories	 <b>婴童保健品</b> Baby & Kids Nutrition Supplement
● 稳定品类 Stable Categories	 <b>婴幼儿配方奶粉 (1段 – 4段)</b> Infant Milk Powder (S1-S4)
	 <b>纸尿裤</b> Diaper
● 复苏品类 Recovering Categories	 <b>婴幼儿辅食</b> Infant Nutrition Food
	 <b>婴童湿巾</b> Wiper
	 <b>婴童洗护</b> Toiletries



# 解码新常态下婴幼儿品牌的增长新路径

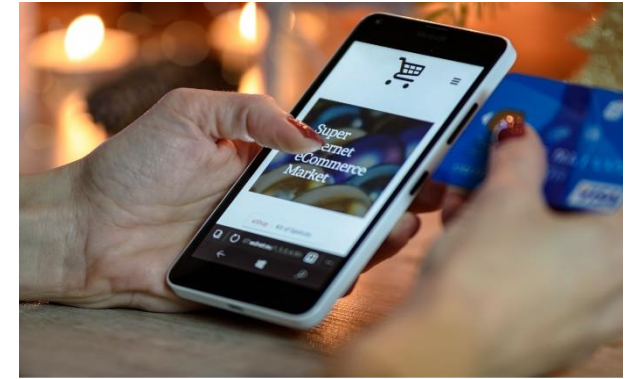
## Unlock Baby Brand Growth Under the New Normal



**聚焦主力人群诉求**  
Focus Key Target Needs



**把握消费者核心需求**  
Track the Needs Expansion



**布局渠道格局转变**  
Seize Channel Evolvment

# 90后妈妈更精细，85前妈妈更愿意购买便捷性食品

Post 90 moms are more sophisticated; pre 85 moms are more open to convenient food

## 不同年龄段妈妈更倾向购买的品类

Spend per buyer index, MAT20Q2, National China

### 85前妈妈 Pre 85s Mom



### 90后妈妈 Post 90s Mom



\*倾向指数: MAT20P6全国85前或90后妈妈在某一特定品类的年均花费 vs. 所有妈妈在相同品类的年均花费\*100, 倾向指数>105为显著差异

\*Index: moms spend per buyer on a specific segment vs. spend per buyer on the same segment among total moms in MAT20P6\*100, index>105 is considered as significant



# 85前妈妈更愿意购买便捷性的食品，同时要满足健康高端的需求

Pre 85 moms are more open to convenient food, yet healthy and premium



婴儿辅食  
Infant Nutrition Food

有机米粉  
Organic Baby Cereal

有机果泥/果汁泥  
Organic Fruit Crush



果泥，果汁泥，米粉  
Fruit Crush/Baby Cereal

指数 Index

112



儿童牛奶  
Kids Milk

儿童牛奶  
Kids Milk

指数 Index

107



坚果牛奶  
Nuts added Milk



配方牛奶  
Sci-PRO NUTR 5+6™

\*指数: MAT20P6全国 85前妈妈品类购买量 vs. 90后妈妈同品类购买量\*100

\*Index: pre 85 moms' volume per buyer of a specific segment vs. post 90 moms' volume per buyer of the same segment in MAT20P6 \* 100

# 90后妈妈需求更精细，愿意为宝宝提供全方位的专业护理

Post 90 moms are more sophisticated

90后妈妈需求更精细  
More sophisticated

人均购买母婴品类数

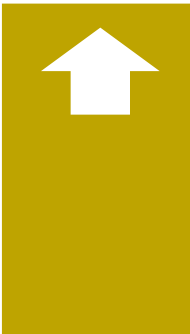
Average baby & Kids Category purchased  
in MAT20P6, National China

4.5



Pre 85 Moms  
85前妈妈

5.2



Post 90 Moms  
90后妈妈



婴幼儿配方奶粉  
IMF(S1-S3)



4段奶粉  
Growing up Formula



婴幼儿润肤露  
Body Care



山茶精华  
Camellia



胚米精华  
Rice Embryo



婴幼儿湿巾  
Wipe



长效滋润  
Moist



添加木糖醇  
Xylitol

# 解码新常态下婴幼儿品牌的增长新路径

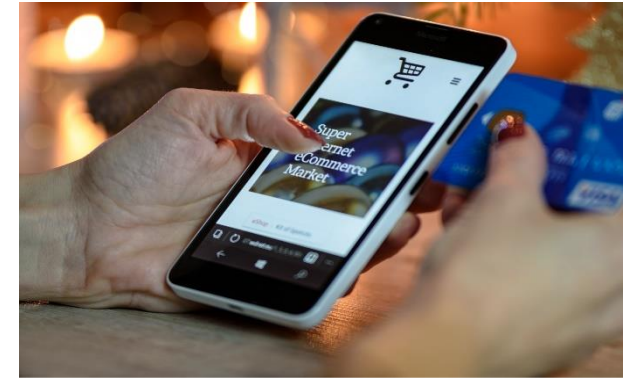
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**把握消费者核心需求**  
Track the Needs Expansion

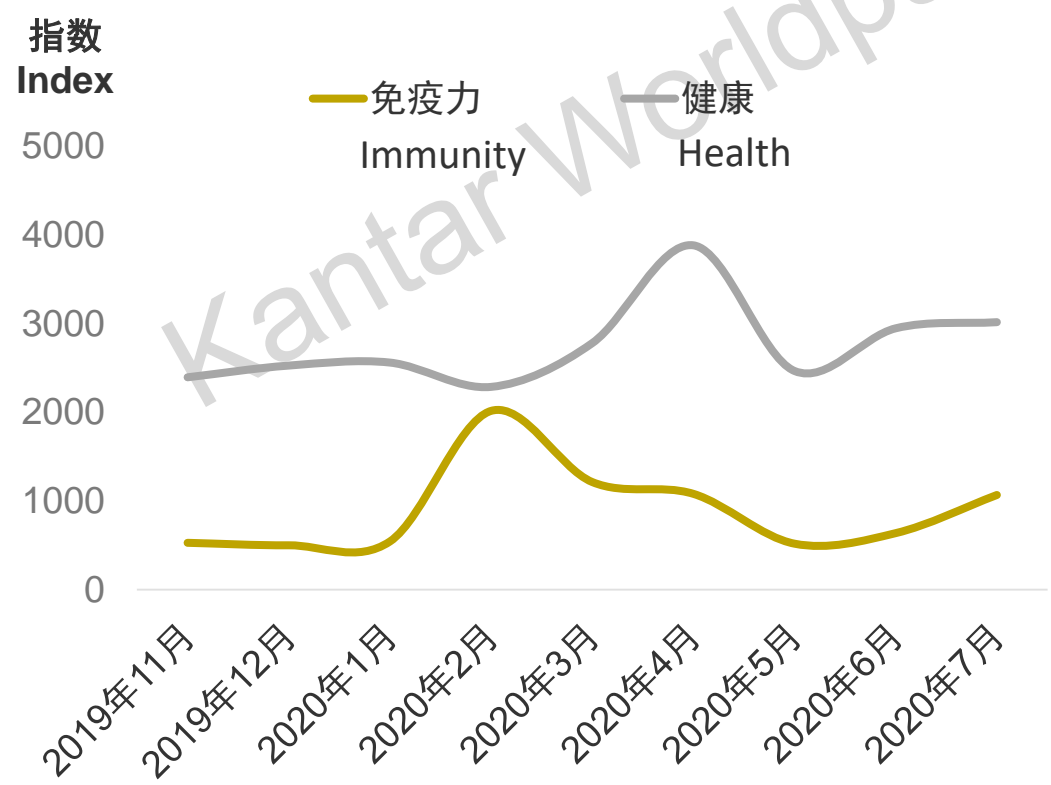


**布局渠道格局转变**  
Seize Channel Evolvment

# 危中有机，疫后健康关注度显著提升，相关产品迎来机遇

Health related products have more opportunities to grow

百度搜索指数趋势  
Baidu Search Index Trend



数据源：百度搜索指数。  
Data Source: Baidu Search Index

## 促进肠道健康，增强抵抗力 Enhance Intestinal Health & Immunity



婴幼儿益生菌产品  
Baby/Kids Probiotics



含乳铁蛋白，OPO  
成分配方奶粉  
Lacto-Ferrin, OPO IMF

Value GR Q2 vs. Q1: **+21%** Value GR Q2 vs. Q1: **+11%**

## 卫生习惯加乘，安全双保险 Hygiene Habits



婴幼儿专用洗手液  
Baby/Kids Hand Wash



婴幼儿专用洗衣液  
Baby/Kids Laundry

Value GR Q2 vs. Q1: **+9%** Value GR Q2 vs. Q1: **+28%**

\*金额增幅20P4-P6 vs. 20P1-P3  
\* Value growth rate: 20P4-P6 vs. 20P1-P3

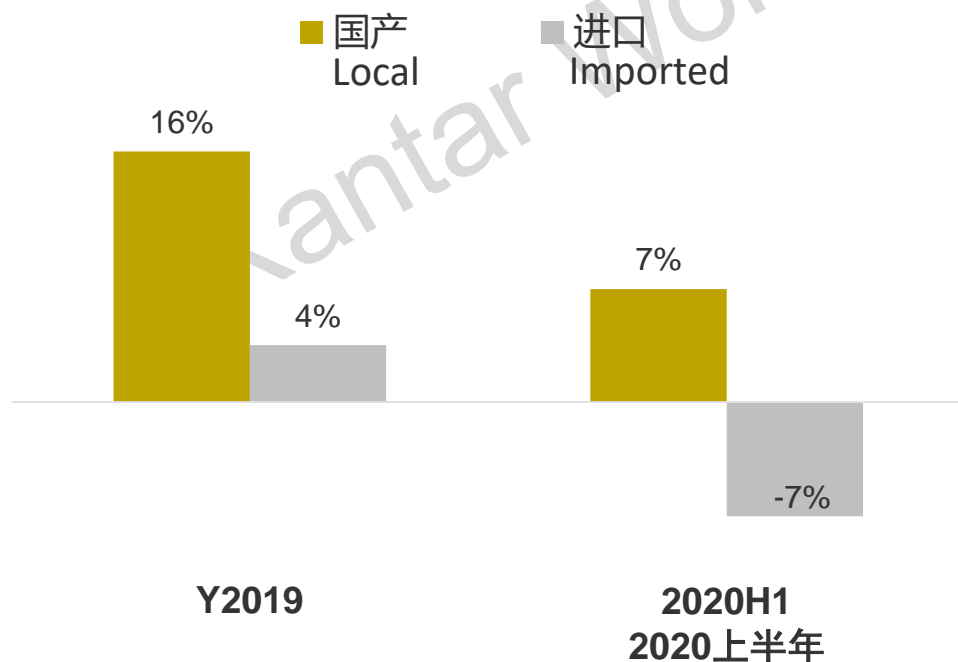


# 无论本土和进口品牌，贴合中国宝宝的需求，持续提升品牌质量至关重要

Regardless of local or imported brands, offering products tailored to Chinese Children and Improving product quality are crucial to win buyers

## 婴童品类整体销额增幅

Baby Category Value Growth Rate vs.LY



## 利用高科技研发手段，提供高质量产品 Leverage high-tech to provide high quality product



长短链益生元组合  
更利于宝宝肠道健康



加量维E搭配弱酸  
护肤屏障保护宝宝肌肤

## 打造更适合中国宝宝的产品 Offer products tailored to Chinese children



“更适合中国宝宝体质”

中国临床证实  
益生菌实验组对比对照组  
大便频率提高  
20%



益生菌冲剂

中国临床试验结果表明  
对宝宝排便有促进作用

# 深耕细分品类市场，满足不同场景和人群需求

Explore different usage occasions & consumer group needs

## 满足人群需求 Meet Consumer Needs

针对不同性别宝宝需求，提供更有针对性的产品  
Products designed for different gender



女孩专用洗发水，沐浴露  
特点：滋养，柔顺，嫩肤  
Girl Specific Shampoo

针对大宝宝需求，扩大产品潜在市场  
Meet big baby needs



XXXL 超大码纸尿裤  
特点：大吸量，大尺寸，防侧漏  
XXXL Big Size Diaper Pant

## 满足场景需求 Meet Occasion Needs

市场Top20防晒品牌中，45%已拥有婴童专属防晒产品  
Many brands offer baby/kid sunscreen product



婴幼儿物理防晒乳液  
特点：温和不刺激，低敏保湿  
Baby/kids Specific Sunscreen

超薄透气，满足夏日需求  
Nude tech, thin & breathable



铂金装夏季小桃裤  
特点：超薄透气，不返渗  
Summer Diaper



# 优化阶段性细分市场，实现产品生命周期最大化

Segment products by baby/kids' age to create more occasions of consumption

## 小皮婴幼儿辅食阶段划分

Little Freddie Infant Nutrition Food Stage Split



## 从婴儿米粉 → 多样化辅食

From Baby Cereal to a Complex Food Offerings

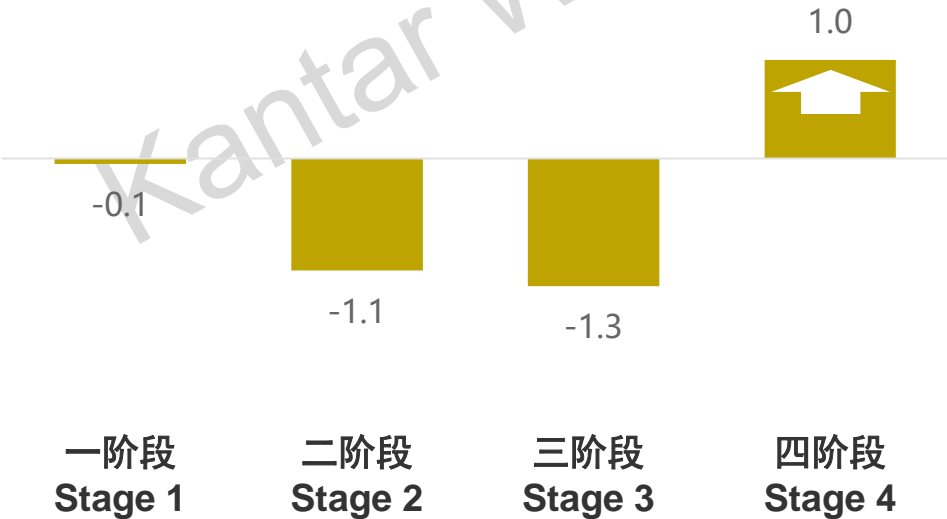


\*图片来源：小皮天猫旗舰店  
\*Picture source: Little Freddie Tmall Flagship store.

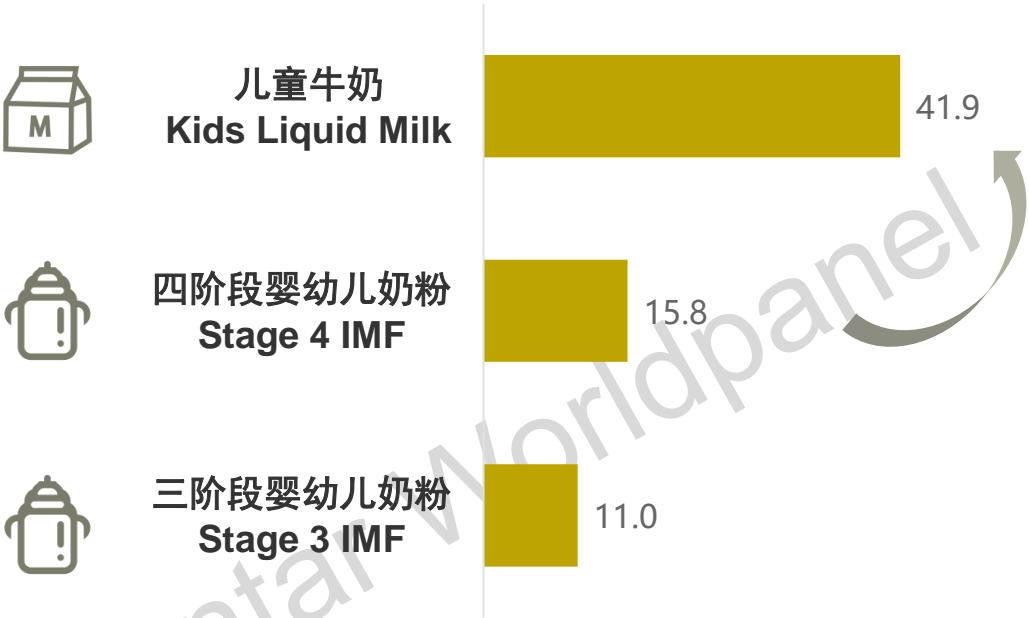
# 持续发力中童市场，寻求增长新机会

Seize the growth opportunity in toddlers

婴幼儿配方奶粉渗透率变化  
IMF Penetration% Change Point  
MAT20Q2 vs. YA, National China



4-6岁儿童渗透率  
Penetration% within 4-6 yrs kids  
in MAT20Q2, National China



# 解码新常态下婴幼儿品牌的增长新路径

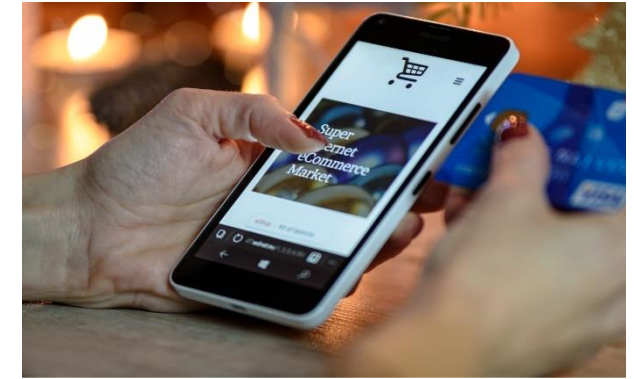
## Unlock Baby Brand Growth Under the New Normal



**聚焦主力人群诉求**  
Focus Key Target Needs



**把握消费者核心需求**  
Track the Needs Expansion

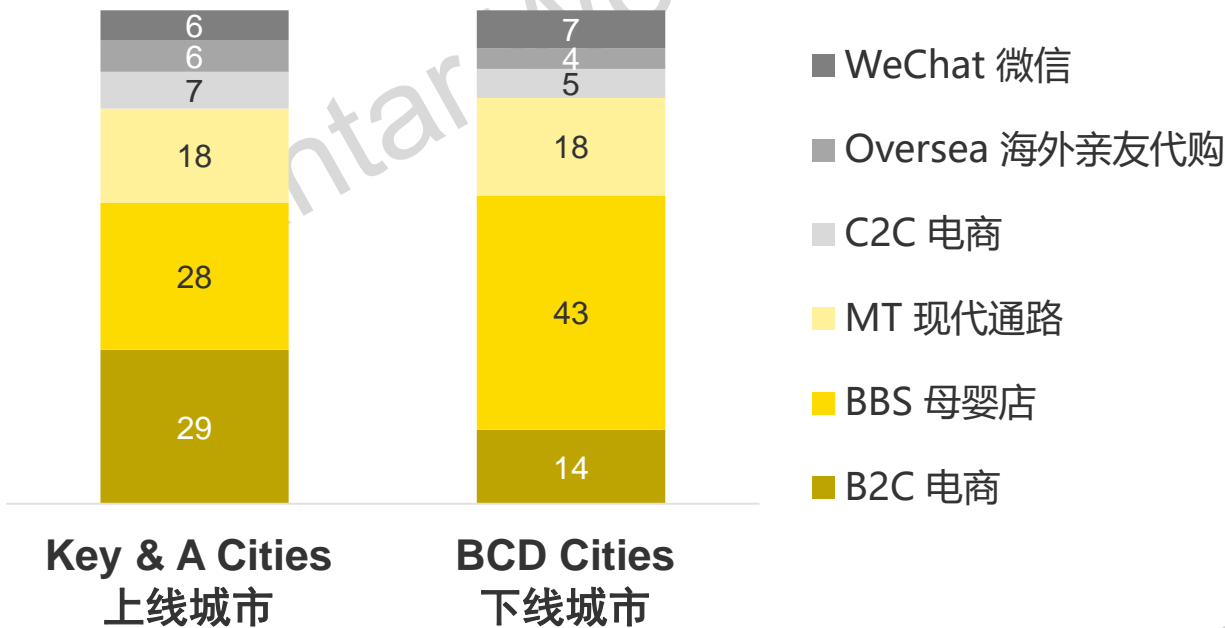


**布局渠道格局转变**  
Seize Channel Evolvment

# 受疫情影响，母婴店增速减缓，和线上渠道竞争加剧

Competition between baby store & online become stronger

渠道销额占比%  
Channel Value %  
MAT20P6, National China



渠道销售金额增速  
Channel Value Growth Rate%,  
National China

	2018 vs. 2019	19H1 vs. 20H1
Baby Category 整体婴童品类	+8%	-0.03%
Online 线上渠道	+13%	+12%
BBS 母婴店	+26%	+14%

# 母婴店持续增加便捷性和用户粘性

Baby stores continue to leverage O2O and manage CRM to reach and retain consumers

## 优化到家服务，增加便捷性

Improve availability with O2O

2020上半年，婴幼儿品类中O2O在

全渠道金额占比 **8.6%**

O2O accounts for 8.6% in baby FMCG sales value in 2020H1

门店到家  
O2O



乐友门店入驻饿了么  
Leyou  
entered O2O Platforms



孩子王微信小程序  
Kidswant  
WeChat mini program

## 私域流量+会员体系，锁定消费者

Private traffic + CRM program to lock buyers

私域流量  
Private traffic



## 品类/服务拓展，增加用户粘性

Category & service expansion, retain shopper



孩子王品类拓展+早教  
Kidswant expand categories & early  
childhood development service



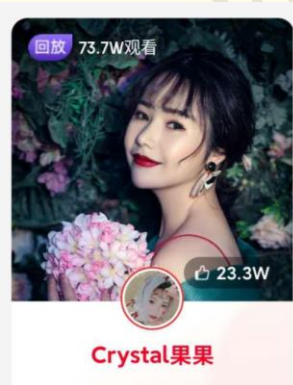
# 线上渠道加深数字化引流，专业的跨境电商产品将取代非专业的代购

Online continue to digitalize, and explore cross border business

## 线上直播增添互动性

EC creates interaction through live stream

直播  
livestream



直播为线上增添互动性，提供咨询，增强用户体验  
Livestream improve user experience

## 发展跨境直达

Leverage CBEC to meet needs for imported

跨境电商  
CBEC



考拉海购

跨境电商为海外产品提供便利  
CBEC meets consumer needs for English label product



# 解码新常态下婴幼儿品牌的增长新路径

Unlock Brand Growth Under the New Normal

持续监测不同消费者的核心诉求和购买行为，通过差异化人群触达，进行深度运营

Continuously tracking the purchase behavior difference of key consumer group and identifying their **core needs, interests** and **product choice**; **tailor brand strategy** and **communication** for different cohorts.



Consumer

及时梳理疫情后创新机会，深化使用场景和人群，实现产品生命周期最大化；关注消费者对价格敏感性，提高价值感。

Review innovation pipelines to ensure it can **meet latest trend** in terms of usage occasion and educate consumers to **maximize product life time value**.  
Closely monitor the price tier sensitivity, deliver the **best value proposition**.



Product

借力数字化引流优势，发力制胜渠道；强化服务体验，利用社交触点形成全场景的拉新和转化。

Improve **in-store experience**, exploit unique advantage of **key digital media** and platforms, utilize all **effective touchpoints** to drive traffic and conversion.



Channel

# KANTAR WORLDPANEL

A CTR SERVICE IN CHINA

# 谢谢



更多消费洞察请关注

