WHAT CHINESE SHOPPERS REALLY DO
BUT WILL NEVER TELL YOU

China Shopper Report 2012, Vol. 1

BAIN & COMPANY

KANTAR WORLD Panels
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In the first report of our series, we discuss the insights gained from a rare look at what shoppers really do at the point of sale, as opposed to what they say they do. The findings can help consumer goods companies determine the best strategy to grow and profit.
Executive summary

When Chinese shoppers purchase most consumer products, they typically choose among several brands instead of showing loyalty to a specific brand. Winning shoppers in this environment is both a challenge and an opportunity for marketers. Success rests on understanding actual shopper behavior—what they do at the point of sale as opposed to what they say they’ll do in surveys.

Bain & Company partnered with Kantar Worldpanel to study the shopping habits of 40,000 Chinese households. Our study helped us gain invaluable insights into how shoppers make purchases in 26 important consumer goods categories (see Figure 1).

Among the key findings:

- In most situations, as shoppers buy more frequently in a category, they also tend to buy more brands in that category. We call this tendency to choose different brands for the same occasion or need repertoire behavior (repertoire being the set of brands purchased by a consumer or shopper within a given category). Their willingness to buy a variety of brands is just as true for heavy shoppers in a category—those who are the top 20% of the most frequent purchasers in a category—as it is for average shoppers.

- It’s not a matter of brands being unimportant to these shoppers. Based on our experience working with clients in China, brand is always a major purchasing criterion. The importance of brands has been established by earlier Bain studies involving buyers in several food and non-food categories in China. In those studies, more than 60% of shoppers listed brand among the top considerations in the purchase process. But the fact is, while Chinese shoppers think about brands, our latest study found they don’t necessarily think about any single brand when they make a purchase.

Figure 1: In this report, we studied 26 consumer goods categories in mainland China

*Blisters formula and baby diapers from Kantar Baby panel, 2011 H2 data only
Note: China mainland excluding Hong Kong, Macau, Taiwan
Sources: Kantar Worldpanel; Bain analysis
While repertoire behavior prevails in China, there are a few product categories where shoppers are more loyal—they repeatedly buy one brand for a specific need or occasion. Those categories include infant formula, baby diapers, beer, milk, carbonated soft drinks and chewing gum. In these categories, the increase in buying frequency does not translate into purchasing more brands.

Two factors contribute to the loyalist behavior of these shoppers. First, brand concentration: Chinese shoppers typically have a limited number of brand choices when buying beer, milk, carbonated soft drinks and chewing gum. Second, routine consumption: In categories such as milk, people who consume the product on a regular basis tend to be more loyal. Buying the brand becomes a habit. However, these more loyal shoppers are a small group, representing less than 10% of total brand sales in these categories.

Data and insights to help consumer goods players in China

Understanding category dynamics is critical for consumer goods makers racing to keep pace with surging demand for their brands by a new generation of Chinese shoppers. With China’s gross domestic product growing by 10.5% annually in the past five years, the average household’s disposable income rose 13.3% in the same time period to RMB 75,800 in 2011, according to Euromonitor. With more money to spend, Chinese shoppers have catapulted China ahead of Japan to make it the world’s second-largest consumer goods marketplace, following the US.

This report presents a groundbreaking look at Chinese shoppers, bringing their purchasing behaviors into sharper focus. For consumer goods makers in search of growth, the findings help fill a serious void, providing detailed data and in-depth analysis of shopper behavior—information that has been limited until now.
Our study provides much richer analysis and sharper insights into shopper behavior than traditional market research. Instead of simply asking questions about past purchases and future intentions, Kantar armed shoppers in 40,000 households with scanners that tracked their actual purchases in real time. Together, we looked at detailed records in the 26 selected consumer goods categories for 2011 and reached several important—and at times, surprising—conclusions.

This comprehensive study covers all Chinese city tiers and life stages. Shoppers from 373 cities in 20 provinces and four major municipalities participated. They reflect the vast range of shopping options available in China today, from the modern trade that flourishes in Tier-1 cities (hypermarkets, supermarkets and convenience stores) to traditional trade that is common in smaller modern cities (mom-and-pop grocery shops, specialty stores and department stores). Also included in the study: China’s young but burgeoning e-commerce market. We tracked older, married shoppers buying shampoo in the aisles of a Guangzhou hypermarket and young students purchasing chewing gum in tiny mom-and-pop stores in cities like Lijiang.

The categories we analyzed span beverages, packaged foods, personal care and home care—the four largest consumer goods groups, which account for more than 80% of China’s consumer goods market. And the brands we studied represent more than 50% of the market value of these four groups.

Implications

For marketers, the implications are far-reaching, providing insights that will help them shape strategic decisions. The path to winning begins by understanding the type of category in which you compete.

For brands in repertoire categories:

- Brands are important to Chinese shoppers—even if they don’t think about one brand frequently. Winning in such an environment means that mar-
keters need to focus on important activities that support two crucial decision moments. The first is to make sure your brand is part of the shoppers’ repertoire. The second is to ensure that there’s enough in-store marketing to recruit shoppers each time they’re selecting a brand and making a purchase.

• **Focus on building scale in priority regions.** Given that scale is required for brands to be visible throughout the year, brands need to focus first on successfully developing local or regional scale in a large and diverse market like China.

• **Asking shoppers what they want won’t help you win them over.** They often don’t know until they’re presented with a repertoire at the point of sale. Focus your efforts on understanding their actual shopping behavior and what your competitors are doing to win them over.

For brands in loyalist categories:

• **Shoppers tend to stick to their preferred brand for a specific need or occasion**, even though they have more brand choices. So it is critical to first recruit new fans in well-defined, targeted segments. For example, infant diaper shoppers can be recruited when their new baby arrives. Next, make sure your brand is a shopper’s preferred brand.

• **Devote resources to highly targeted marketing initiatives and public relations events to build brand preference.** These marketing campaigns are aimed at your loyal shoppers and include media commercials, social media, celebrity product endorsements, sports sponsorships, among others.

• **Make sure that fans can easily find your brand in the store.** But you don’t need to constantly recruit them with in-store activations.
Bain has been codifying shopper behavior in different consumer goods categories since 2007. Based on that experience, all shopper behavior ranges between two extreme types: loyalist and repertoire. Shoppers demonstrate loyalist behavior when they frequently buy one brand for a specific need or occasion. In contrast, shoppers exhibit repertoire behavior when they choose multiple brands within a category for the same occasion or need. Most people display a range of both loyalist and repertoire behaviors, depending on the category. Also, the same category may elicit different purchasing behaviors from one country to another. Brand strategy and activation models work best when tailored to consumer behavior.

Prevalent repertoire behavior

In most of the 26 consumer goods categories, we found that the vast majority of shoppers are, in fact, defined by repertoire behavior. The shoppers tend to choose more brands in the categories that they buy more frequently (see Figure 3).
to recruit new consumers. For example, it jump-started sales by lowering the sweetness level to adapt to local tastes. It also introduced smaller packages of the original Oreo biscuits and also Mini Oreo in cups, to make Oreo more affordable to the majority of Chinese shoppers and better suited to their preference for bite-size treats. And it introduced local flavors like green tea ice cream.

To educate Chinese consumers about the American tradition of pairing cookies with milk, Kraft launched TV commercials and a grassroots marketing campaign. It recruited 300 university students to serve as Oreo brand ambassadors. By 2008 Oreo reigned as China’s top-selling biscuit, doubling its sales by 2009. Following the right approach in this typical repertoire category, Kraft focused on extending its brand penetration and did not try to push brand loyalty.

The 20% of Oreo shoppers who are the product’s most frequent purchasers in China contribute 60% of its sales value. That sounds impressive until you consider the same shoppers also contribute 25% to 35% of com-

Another finding is that even as shoppers increase their purchasing within most categories—as they buy more juice or chocolate, for example—they use it as an opportunity to try different brands in the category (see Figures 4 and 5). The average Chinese household purchased 6.2 brands of biscuits (cookies) last year. The heavy shoppers in the category—those representing the top 20% of biscuit purchasers who buy most frequently—bought 10.4 brands.

Or take facial tissue. The average shopper bought the product 6.7 times last year, alternating between three and four brands. But heavy shoppers, who purchased facial tissues 14 times last year, chose five or six brands.

Indeed, our research suggests that in repertoire categories, a brand’s heavy shoppers are often heavy shoppers of competing brands, too.

Consider the story of Oreo, the market leader in China’s biscuit category. Since introducing Oreo to Chinese shoppers in 1996, Kraft Foods took a number of steps

Figure 3: In most categories studied, Chinese shoppers tend to buy more brands as they buy more frequently in a category

Shoppers demonstrate a “repertoire” behavior in most categories

Sources: Kantar Worldpanel; Bain analysis

Average number of brands purchased per household (2011)

Category purchasing frequency (average number of purchase occasions per household, 2011)
Figure 4: Heavy shoppers buy more brands compared with average shoppers...

Heavy shoppers’ average number of brands purchased per household (2011)

![Bar chart showing the average number of brands purchased per household for different categories.](chart1)

Note: Heavy shoppers refer to the top 20% of the most frequent shoppers in a category.
Sources: Kantar Worldpanel, Bain analysis

Figure 5: ...and they buy more brands as they purchase more frequently in most categories

Average number of brands purchased per household (2011)

![Line chart showing the average number of purchase occasions per household for different categories.](chart2)

Note: Heavy shoppers refer to the top 20% of the most frequent shoppers in a category.
Sources: Kantar Worldpanel, Bain analysis

Some categories, like milk and beer, skewed to “loyalist” behavior: the number of brands purchased per household doesn’t increase as much as purchasing frequency increases.
ries, we found that marketing focused on specific channels or occasions is often the most effective way to target category heavy shoppers.

**Signs of loyalist behavior**

In other categories, however, we find shoppers do not increase the number of brands they buy as their purchasing frequency increases—a sign of loyalist behavior. In infant formula and baby diapers, shoppers buy the same number of brands no matter how frequently they purchase them. A heavy shopper buys infant formula 13.4 times a year, while an average shopper makes the purchase 7.1 times. But in either case, there’s little variation in the number of brands they choose—1.8 brands compared with 1.5 brands (see Figure 8).

In contrast with the repertoire categories, a brand’s heavy shoppers tend to spend little on competing brands, and the brand has a high share of wallet among its heavy shoppers. (Share of wallet is the percentage of a shopper’s spending that’s devoted to a given brand...
Figure 6: In repertoire categories, heavy shoppers of a brand are often heavy shoppers of competing brands as well

<table>
<thead>
<tr>
<th>Diaopai’s top 20% heavy shoppers</th>
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<td>Diaopai’s heavy shoppers contribute more than 50% of its sales value</td>
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Diaopai’s heavy shoppers’ contribution to its 2011 sales value vs. that of average shopper  
Diaopai’s heavy shoppers’ contribution to other brands’ sales value in 2011  
Diaopai’s heavy shoppers’ spending on fabric detergent, by brand

Note: Heavy shoppers refer to the top 20% of the most frequent shoppers of a brand
Sources: Kantar Worldpanel; Bain analysis

Figure 7: In repertoire categories, heavy shoppers of a brand are often heavy shoppers of competing brands as well

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<th>Diaopai’s top 20% heavy shoppers</th>
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<td>Diaopai’s heavy shoppers contribute about 60% of its sales value</td>
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Diaopai’s heavy shoppers’ contribution to its 2011 sales value vs. that of average shopper  
Diaopai’s heavy shoppers’ contribution to other brands’ sales value in 2011  
Diaopai’s heavy shoppers’ spending on biscuits, by brand

Note: Heavy shoppers refer to the top 20% of the most frequent shoppers of a brand
Sources: Kantar Worldpanel; Bain analysis

**Figure 8:** Shoppers in some categories show “loyalist” behavior in China

![Graph showing loyalist behavior in China](image)

Notes: Heavy shoppers refer to the top 20% of the most frequent shoppers of a brand; Kantar Baby panel covers 2,000 households with a baby younger than 3 in Tier-1 and Tier-2 cities. Sources: Kantar Worldpanel; Bain analysis.

within a category.) Consider the infant formula segment. The top 20% of Mead Johnson’s heavy shoppers account for 40% of the brand’s sales but contribute at most 10% to competitors’ sales. And Mead Johnson claims a significant share of those shoppers’ wallets. Those heavy shoppers devote 85% of their infant formula spending to Mead Johnson (see Figure 9). The situation is similar with Pampers in baby diapers. More than 50% of Pampers’s sales come from heavy shoppers, and those shoppers contribute less than 6% to any one competitor. And Pampers earns a high share of wallet from these heavy shoppers—a full 80% (see Figure 10).

One Bain study of shoppers of infant products found that they don’t have motivation to switch brands. The babies aren’t providing feedback on the benefits or drawbacks to the product, so shoppers have little reason to change one brand for another. Also, studies have shown that mothers feel it’s beneficial to a baby’s health to stick with a single brand. And this is one situation in which shoppers often are introduced to a particular brand in the hospital or clinic at the critical moments following a child’s birth—and they tend to stay loyal to that brand. That is why leading infant formula players have medical detailing teams visiting hospitals, nurses and pediatricians, in addition to their salesforce visiting other sales channels.

Four other categories show signs of loyalist behavior: milk, beer, chewing gum and carbonated soft drinks. Unlike most other categories, where shoppers try more brands as they buy more frequently, heavy shoppers in these loyalist categories don’t increase the number of brands they purchase as they increase their rate of purchase. As their consumption becomes routine, they tend to stick to one preferred brand—which gets more of their share of wallet. And these shoppers tend to spend less on competing brands.

We also see loyalist behavior in categories and geographies that are highly concentrated, where the top three
Figure 9: In loyalist categories, a brand’s heavy shoppers contribute very little to competing brands’ sales.

Mead Johnson’s heavy shoppers contribute about 40% of its sales value. These shoppers contribute very little to other brands’ sales value. Mead Johnson accounts for 85% of their total infant milk formula spending.

Notes: Heavy shoppers refer to the top 20% of the most frequent shoppers of a brand; Kantar Baby panel covers 2,000 households with a baby younger than 3 in Tier-1 and Tier-2 cities. Sources: Kantar Worldpanel; Bain analysis.

Mead Johnson's heavy shoppers contribute about 40% of its sales value. These shoppers contribute very little to other brands' sales value. Mead Johnson accounts for 85% of their total infant milk formula spending.

Figure 10: In loyalist categories, a brand’s heavy shoppers contribute very little to competing brands’ sales.

Pampers’s heavy shoppers contribute more than 50% of its sales value. These shoppers contribute very little to other brands’ sales value. Pampers accounts for 80% of their total baby diaper spending.

Notes: Heavy shoppers refer to the top 20% of the most frequent shoppers of a brand; Kantar Baby panel covers 2,000 households with a baby younger than 3 in Tier-1 and Tier-2 cities. Sources: Kantar Worldpanel; Bain analysis.
When we analyzed the leading brands in each of the repertoire categories, we found that winners have one critical thing in common: high rates of penetration compared with the average of the top 20 brands in their category (see Figure 12).

In toothpaste, Crest is the brand with the highest penetration rate—57% compared with the average of 15% for the category’s top 20 brands. Not surprisingly, it’s also the category leader, with 15% market share. Like leading brands in other categories, Oreo maintains the highest penetration rate among any biscuit player. Its penetration rate of 46% is nearly three times the national average for the top 20 brands, and its market share of 10% is higher than that of its competitors. Master Kong has a 29% penetration rate and 4% market share. Nestlé maintains a 16% penetration rate and 3% market share, although its penetration rate is higher in Tier-1 cities. Penetration and purchasing frequency often work hand in hand (see Figure 13). Just as it...
Figure 72: In the “repertoire” environment, leading brands have a much higher penetration than competing brands

Penetration rate: leading brand vs. average of top 20 brands in each category (2011)

![Bar chart showing penetration rates for various categories such as instant noodles, yogurt, RTD tea, toothpaste, facial tissue, etc., with Master Kong, Mengnian, personalized wash detergent, Minute Maid, Oreo, etc.]

Sources: Kantar Worldpanel; Bain analysis

Figure 73: Leading brands achieved substantially higher penetration, driving brand purchasing frequency

![Graph showing brand purchasing frequency per household (2011)]

Most leading brands outperform in penetration...

Penetration rate (2011)

<table>
<thead>
<tr>
<th>Brand</th>
<th>2011 market share (value)</th>
<th>2011 penetration rate in Tier-1 cities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oreo</td>
<td>10%</td>
<td>46%</td>
</tr>
<tr>
<td>Master Kong</td>
<td>4%</td>
<td>29%</td>
</tr>
<tr>
<td>Nestlé</td>
<td>3%</td>
<td>16%</td>
</tr>
<tr>
<td>Glico</td>
<td>3%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Nestlé has a better penetration rate in Tier-1 cities: 26%

Top 20 average

...which is closely linked with the purchasing frequency of the brand

Brand purchasing frequency per household (2011)

Notes: Right-hand side includes brands with national market share (value) of more than 1%; Glico is an outlier

Sources: Kantar Worldpanel; Bain analysis
Another factor that is less important than penetration is share of wallet among a brand’s shoppers (see Figure 14). Our study found that some leading brands achieved only an average share of wallet. Look at Diaopai’s share among fabric detergent shoppers: It’s actually lower than that of Liby, OMO or Bluemoon—all of which are market share followers. In toothpaste, leader Crest’s share of wallet is actually significantly lower than that of Darlie and not much above the industry average.

And we found that as they increase penetration, leaders focus on the right product format, city tiers and channels. For example, Bluemoon sells only liquid laundry detergent and has been able to target its penetration efforts on Tier-1 and Tier-2 cities, where shoppers prefer the liquid form. Diaopai focuses on laundry powder and laundry bars, striving to build up its high rate of penetration in Tier-2 to Tier-5 cities, where powder and bars are still popular.

leads in penetration and market share, Oreo has the highest rate of repurchasing frequency. The brand was repurchased 3.3 times per household in 2011 compared with 2.7 times for Master Kong and two times for Nestlé.

In these categories, success for leading companies has more to do with penetration than other factors, such as whether shoppers make repeat purchases of the brand more than once a year (see Figure 14). In fact, even for the leading brand in each category, more than 40% of brand shoppers are still trial shoppers—they bought the top brand only once last year. Looking at fabric detergents, brand leader Diaopai’s repeat purchase rate of 64% is not significantly higher than followers like OMO (55%) and Bluemoon (46%). And in toothpaste, the rate of repeat purchases for the leader, Crest (58%), is not much higher than that of followers like Darlie (52%) and Colgate (51%).

*Repurchase rate refers to shoppers who buy more than once a year as a percentage of all brand shoppers
Note: Indexed penetration of Nongfu in bottled water, for example, equals Nongfu’s penetration rate divide by the average penetration rate of the top 20 brands
Sources: Kantar Worldpanel, Bain analysis

Figure 14: However, leading brands don’t necessarily have much higher repurchase rates or share of wallet (SOW) than competing brands
Rules of the road

Whether a brand is a leader or a follower in its category, gaining market share and sustaining growth in China means following some clear rules.²

In repertoire categories:

• Make sure your brand is part of shoppers’ repertoire, and then recruit them when they purchase through in-store activation, day in and day out. For leading brands, remember that while your brand might already be in many shoppers’ repertoire, it doesn’t mean those shoppers will choose you again next time they buy. Invest to recruit them in the store, just as you would recruit any new shopper—otherwise you risk losing the shoppers to other brands in their repertoire. For followers, the good news is that Chinese shoppers exhibit repertoire behavior in most categories; this makes it possible to win shoppers from competitors. The key is to drive penetration through effective in-store activation in targeted channels.

• Build brand awareness by using “above-the-line” marketing initiatives, like TV commercials, that complement “below-the-line” efforts. This will get shoppers to think about your brand when they shop for a specific occasion or need.

• Don’t focus too much on trying to make shoppers loyal to your brand. It’s not about how they shop in the category. The reality is that one brand’s heavy shoppers are likely to be a competitor’s heavy shoppers, too. Focus on in-store activation with perfect sales execution in the target channels, where you will find the category’s heavy shoppers.

• Build scale in priority regions first. China is undeniably big, and successful companies don’t view it as a single market. If scale is required for year-round visibility, the most cost-effective approach is to target a locality or region—and then move on to the next one with a winning repeatable model. Neither multinationals nor local players can hope to go national without first building local scale.

• Instead of asking shoppers what they want, invest to understand their actual shopping behavior. For market followers, it’s also a good way to see what the leading brands are doing to recruit shoppers.

In loyalist categories:

• Recruit new shoppers in well-defined segments where you’re likely to find and attract shoppers who will stick to a preferred brand for a specific need or occasion. For both leaders and followers, the most critical move is to find a well-defined shopper segment and encourage them to try your brand first. Pampers, the leading brand in baby diapers, provides free trial packages of diapers to new mothers when they give birth in a hospital. The first trial is the foundation for building brand preference.

• Build brand preference through highly targeted marketing initiatives and public relations events. Leading brands in the loyalist categories continuously invest to build brand preference. They put special emphasis on specific switching points, investing to reduce churn.

• Don’t focus too much on trying to make shoppers loyal to your brand. It’s not about how they shop in the category. The reality is that one brand’s heavy shoppers are likely to be a competitor’s heavy shoppers, too. Focus on in-store activation with perfect sales execution in the target channels, where you will find the category’s heavy shoppers.

As demand for everything from fabric softener to hair conditioner to chewing gum increases at a record pace in China, you can develop a strategy that will help you serve that demand—and profit. Understanding the critical nuances of shopper behavior at the point of sale arms you with the ammunition needed to outpace the competition. These findings from our extensive study on China’s shopper behavior—a groundbreaking look—are valuable to any consumer goods company executive searching for the best way to grow and prosper along with China’s economy.

² For more information on Bain’s approach to brand building, see the Bain brief “Introducing The Bain Brand Accelerator™,” published in 2011.
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We will continue our study of Chinese shoppers in follow-up reports, each of which will focus on a different and complementary topic. We will address such topics as

• What does this research mean for retailers?

• Are there differences in shoppers’ behaviors across city tiers, regions and category types?

• What are the implications for multinational companies and local firms across categories?
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We use the latest data collection technologies best matched to the people and the environment we are measuring. Our expertise is rooted in hard, quantitative evidence—evidence that has become the market currency for local and multinational FMCG brand and private label manufacturers, fresh food suppliers, retailers, market analysts and government organizations. We are not limited to the grocery sector; we have a wide range of panels in fields as diverse as entertainment, communications, petrol, fashion, personal care, beauty, baby and food-on-the-go.

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