

FMCG Promotion Review (Pen Mal)

Jan- Jun 2020 vs 2019

By Intrack Market Services

Notes of MailerTrack Information

1



Price information is based on
Published Promotion Price in
mailer/newspaper/In-Store poster/
social media and
not everyday shelf pricing

2



MT review number represents
number of promotion features
(occurrence) done by each
category/ retailer/ supplier in
Mailer, Newspaper, In-store (CVS
& Petrol Marts) & Social Media

3



Exclude Regional Data
(Mailer/ Newspaper only for
particular Region/ Outlet)

Promotion in MailerTrack 2.0 break down into 3 different types:

Normal Promo



Where the promotion advertised with **one product description and one price**

Range Promo



Where promotion **comes with a range** that is in percentage discount/ in price discount range

Buy X Free Y



Buy Any 3 (380ml/500ml/1.5L)
FREE 1 Limited Edition Premium
[Promotion period: 15 Jan - 28 Feb 2018]

Where there are **no prices advertised** for the product, and it's only buy a product get another product for free

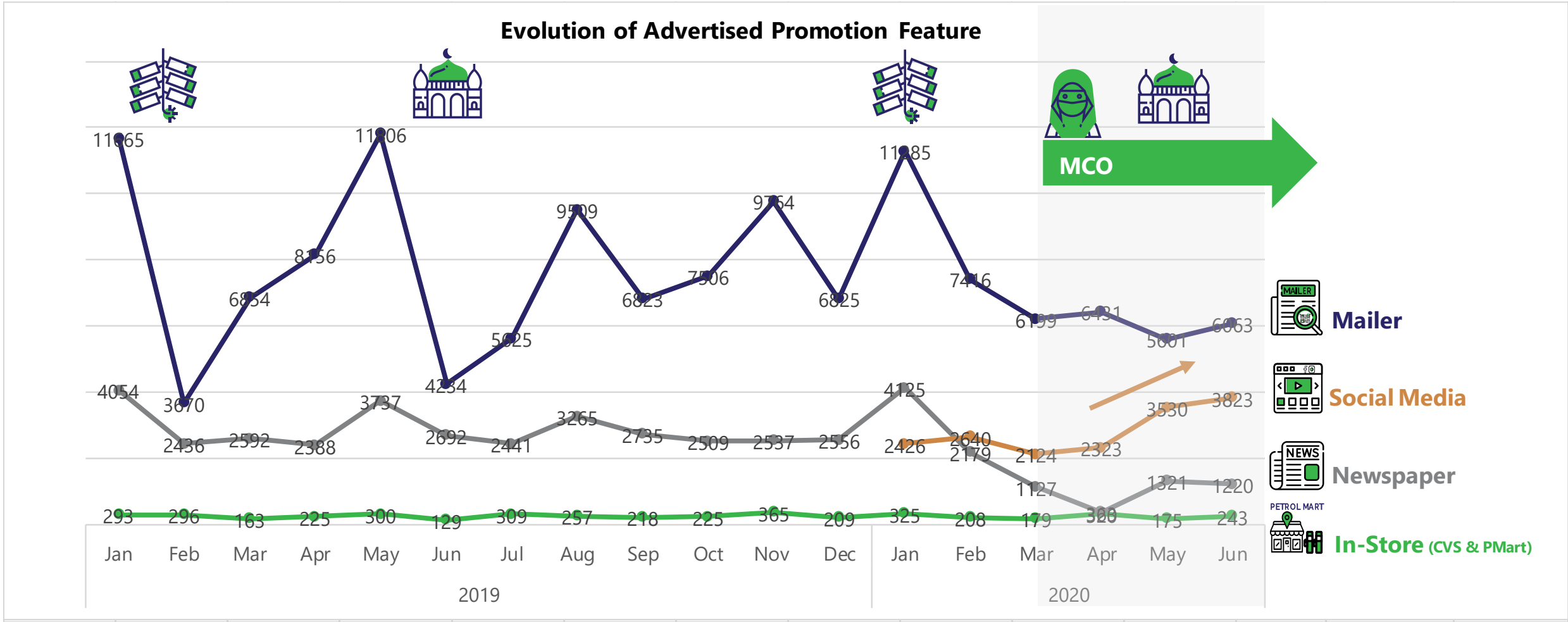
Contents

- 1) Evolution of Advertised Promotion (Mailer, Newspaper, In-Store & Social Media)
- 2) Importance of House Brand
- 3) Price Competitiveness





Source: MailerTrack - All channels, excluding regional promotion, Jan-Jun 2020 vs 2019

Social Media is picking up the pace as a new medium for advertise promotion in 2020

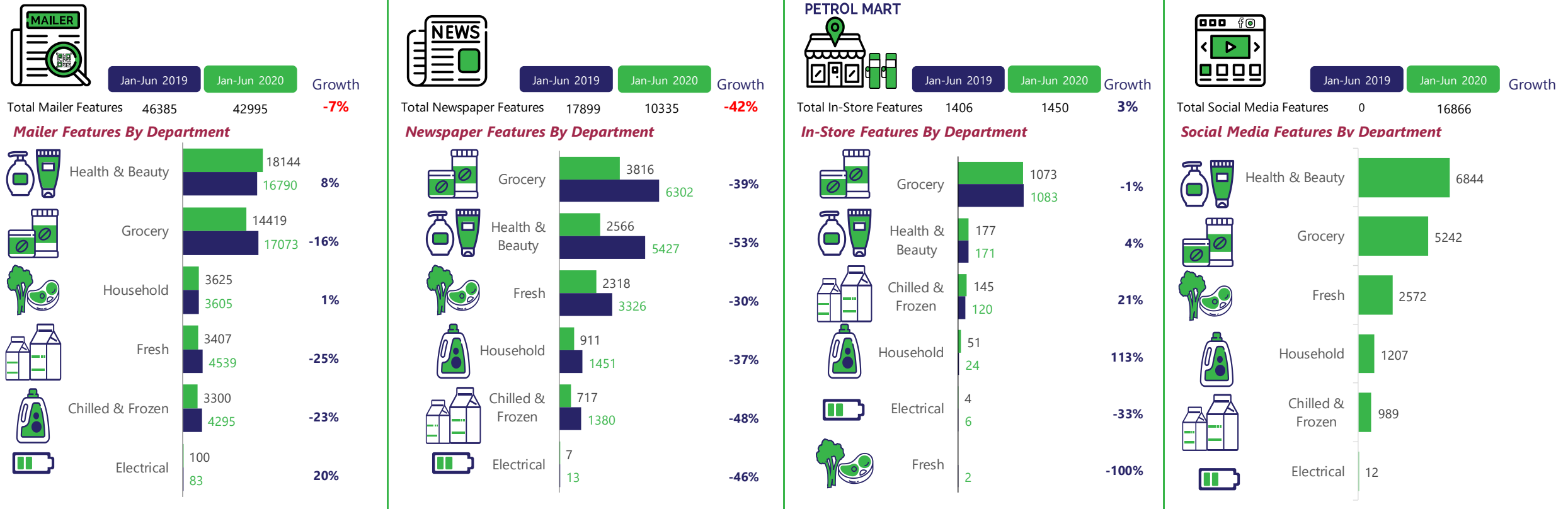
Covid Pandemic expedite the decline of investment on press ad promo



60% of the promotion feature was still coming from Mailer although the promotion had slight reduce due to MCO

		TOTAL PROMO FEATURES			NORMAL PROMO			RANGE PROMO			BUY X FREE Y		
Promotion Share		Jan-Jun 2019	Jan-Jun 2020	Growth	Jan-Jun 2019	Jan-Jun 2020	Growth	Jan-Jun 2019	Jan-Jun 2020	Growth	Jan-Jun 2019	Jan-Jun 2020	Growth
60%		46385	42995	-7%	44410	40720	-8%	35	2217	15%	40	58	45%
14%		17899	10335	-42%	16545	9719	-41%	1319	611	-54%	35	5	-86%
2%		1406	1450	3%	1372	1378	0%	6	49	717%	28	23	-18%
24%			16866			16033			818			15	

Health & Beauty , Grocery & Fresh categories were highly promoted via Social Media



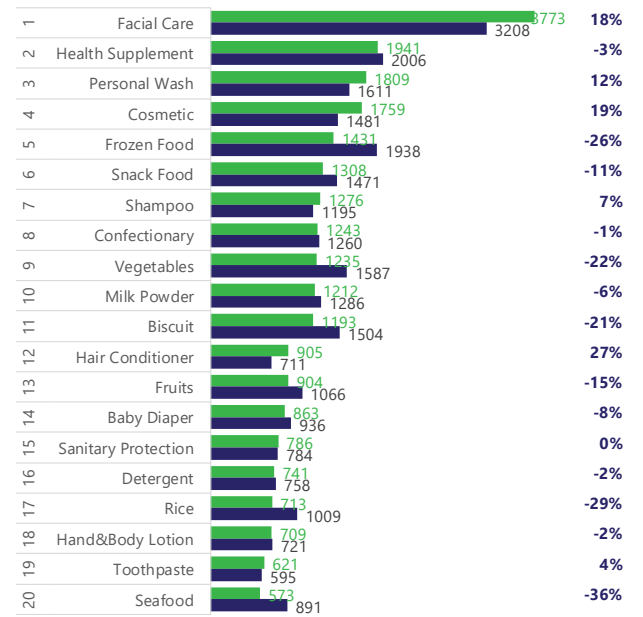
Source: MailerTrack Jan-Jun 2020 vs 2019, Mailer, Newspaper, In Store & Social Media Excluding Regional Data

Facial Care show the heaviest promotion feature for Social Media , Follow by Fresh categories (Vegetables , Fruits , Meat) which were heavily focus by most Hypermarket



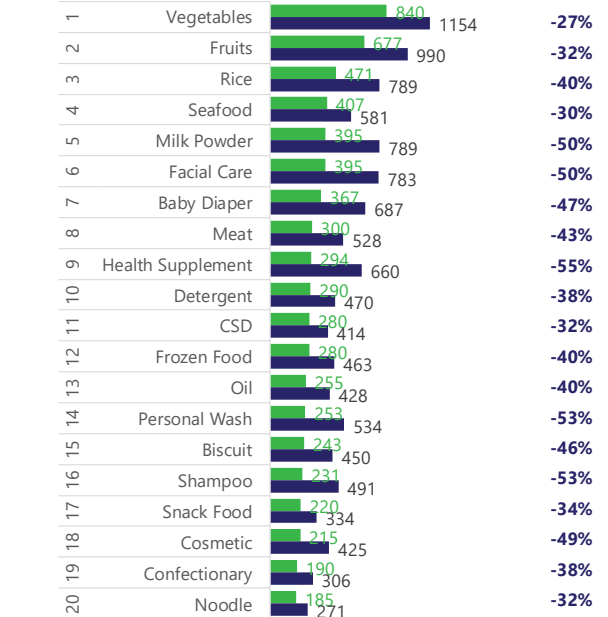
Total Mailer Features
Mailer Features By Categories

Category	Jan-Jun 2019	Jan-Jun 2020	Growth
Total Mailer Features	46385	42995	-7%



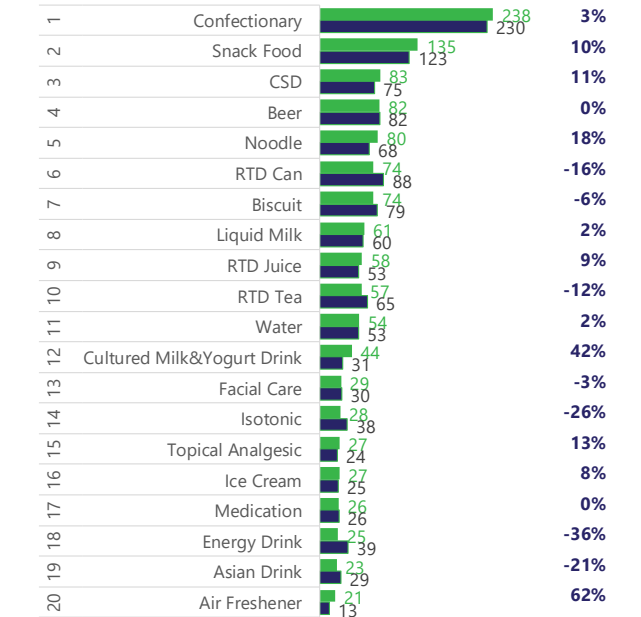
Total Newspaper Features
Newspaper Features By Categories

Category	Jan-Jun 2019	Jan-Jun 2020	Growth
Total Newspaper Features	17899	10335	-42%



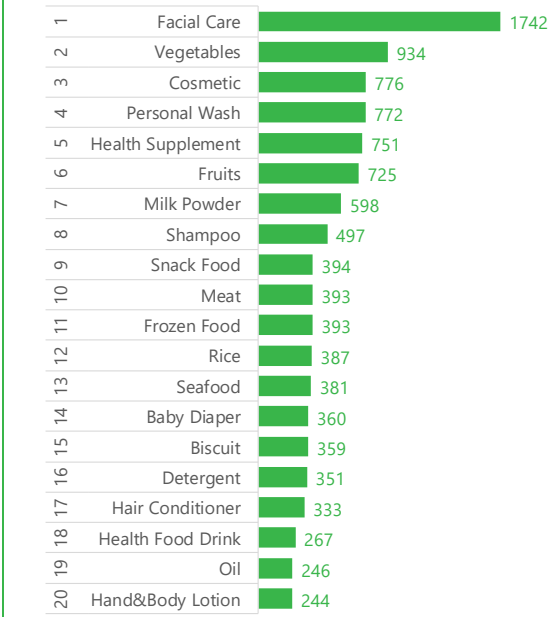
Total In-Store Features
In-Store Features By Categories

Category	Jan-Jun 2019	Jan-Jun 2020	Growth
Total In-Store Features	1450	1406	-3%



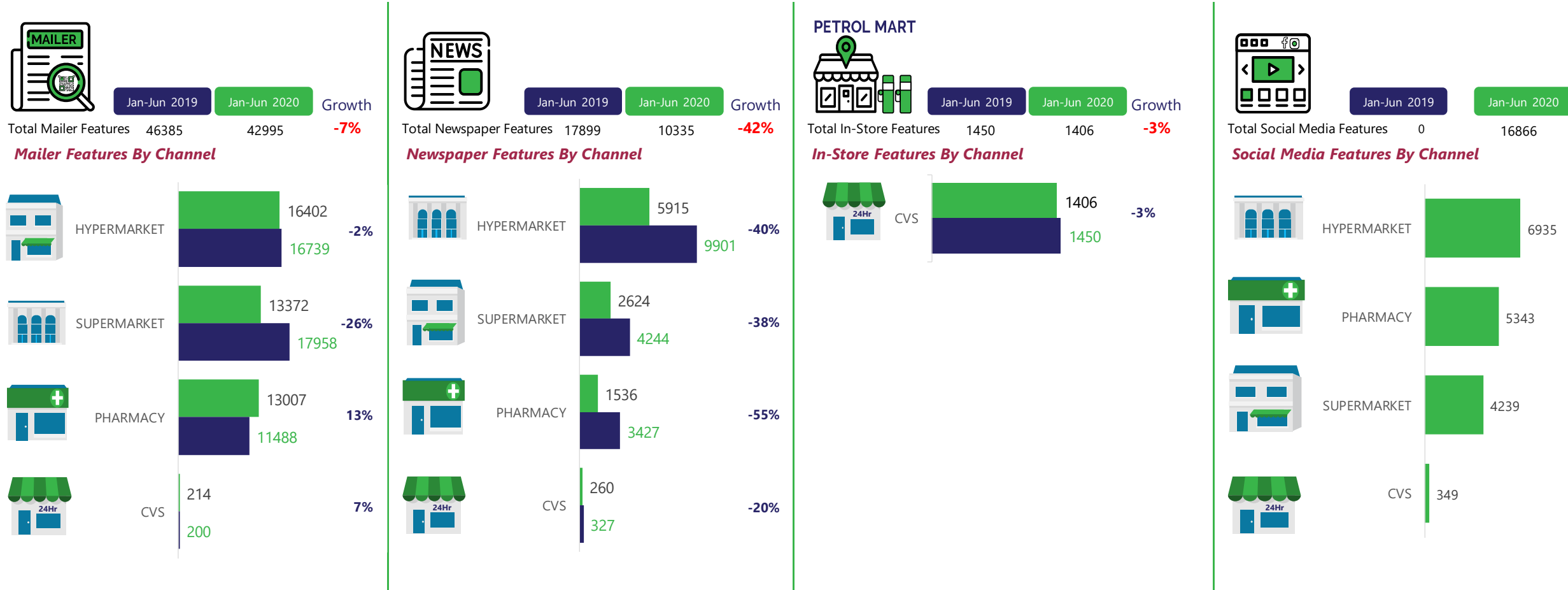
Total Social Media Features
Social Media Features By Categories

Category	Jan-Jun 2019	Jan-Jun 2020
Total Social Media Features	0	16866



Source: MailerTrack Jan-Jun 2020 vs 2019, Mailer, Newspaper, In Store & Social Media Excluding Regional Data

Hypermarket & Pharmacy channels were seen switching promotion from Newspaper to Social Media

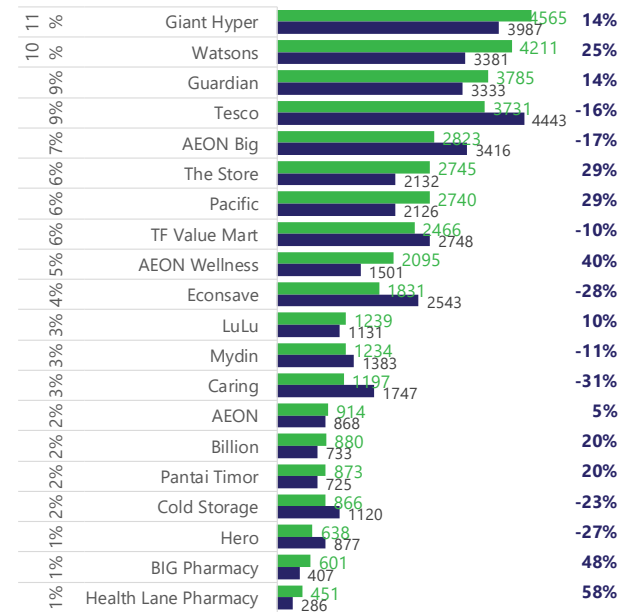


Source: MailerTrack Jan-Jun 2020 vs 2019, Mailer, Newspaper, In Store & Social Media Excluding Regional Data

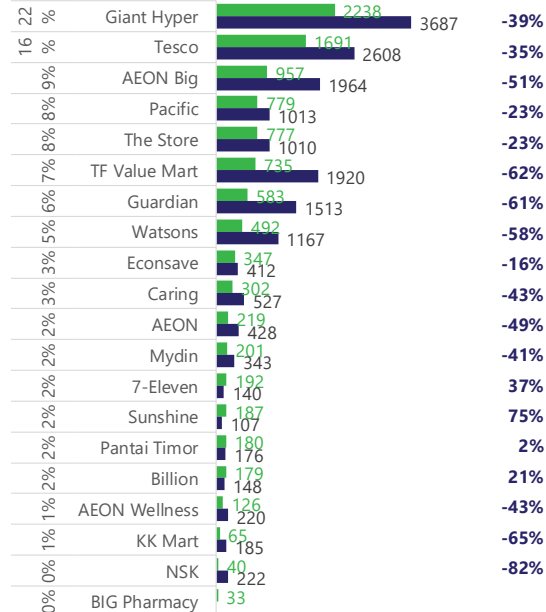
Switch of promotion was spotted at those key players like Watson, Tesco, Giant Hyper , Aeon Big



Total Mailer Features
Jan-Jun 2019: 46385
Jan-Jun 2020: 42995
Growth: -7%
Mailer Features By Retailers



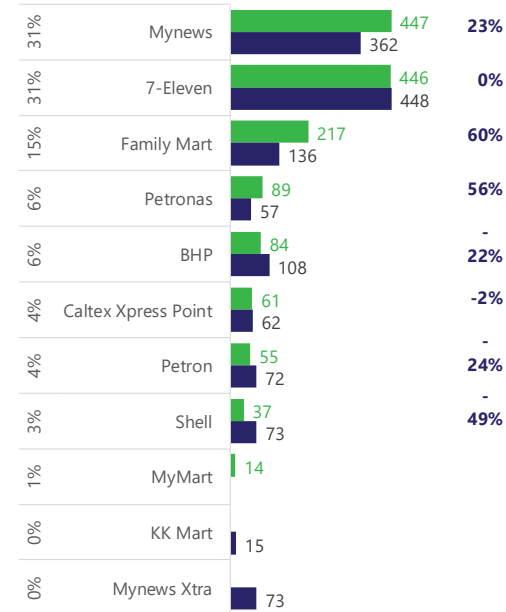
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Newspaper Features By Retailers



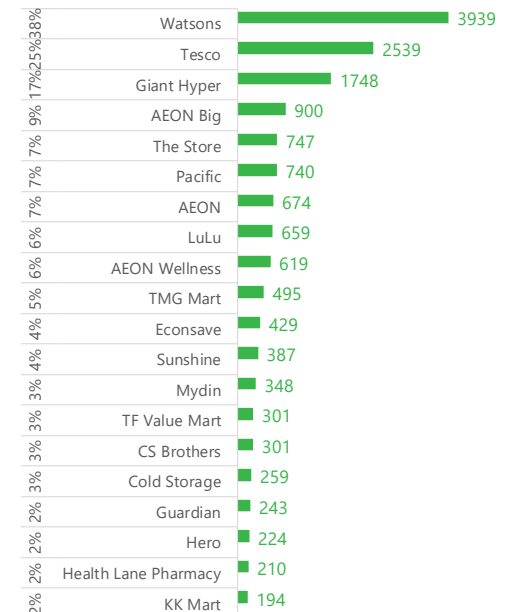
PETROL MART



Total In-Store Features
Jan-Jun 2019: 1450
Jan-Jun 2020: 1406
Growth: -3%
In-Store Features By Retailers



Total Social Media Features
Jan-Jun 2019: 0
Jan-Jun 2020: 16866
Growth: -
Social Media Features By Retailers



Source: MailerTrack Jan-Jun 2020 vs 2019, Mailer, Newspaper, In Store & Social Media Excluding Regional Data

Aeon big mailer changes way of doing promotion in Q2-2020- With more 1-2 pages promotion instead of booklet

Average Mailer Features **TESCO**




Giant

AEON BIG

MYDIN







ECONSAVE

TF VALUE-MART

		2019				2020		2019				2020		2019				2020		2019				2020		2019				2020							
		Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2						
Frequency of Mailer		Weekly				Fornightly				Fornightly				Fornightly				Fornightly				Fornightly				Fornightly											
No. of Mailer Issued		15	13	13	14	13	13	6	8	9	11	8	9	13	9	9	10	14	14	3	3	6	3	6	5	6	7	7	8	5	6	6	7	8	7	7	7
Average No. Of Feature Per Mailer		<div><div></div><div></div><div></div><div></div></div> <div>136185139154139148</div>				<div><div></div><div></div><div></div><div></div></div> <div>293279228203324219</div>				<div><div></div><div></div><div></div><div></div></div> <div>15915014313914259</div>				<div><div></div><div></div><div></div><div></div></div> <div>226235161242119105</div>				<div><div></div><div></div><div></div><div></div></div> <div>212182181157179156</div>				<div><div></div><div></div><div></div><div></div></div> <div>216207170212194158</div>															
	Grocery	<div><div></div><div></div><div></div><div></div></div> <div>658466706456</div>				<div><div></div><div></div><div></div><div></div></div> <div>169150115106168121</div>				<div><div></div><div></div><div></div><div></div></div> <div>778077667632</div>				<div><div></div><div></div><div></div><div></div></div> <div>858962984637</div>				<div><div></div><div></div><div></div><div></div></div> <div>928682738073</div>				<div><div></div><div></div><div></div><div></div></div> <div>938973937371</div>															
	Household	<div><div></div><div></div><div></div><div></div></div> <div>151919171924</div>				<div><div></div><div></div><div></div><div></div></div> <div>242318212920</div>				<div><div></div><div></div><div></div><div></div></div> <div>18221820159</div>				<div><div></div><div></div><div></div><div></div></div> <div>233015231915</div>				<div><div></div><div></div><div></div><div></div></div> <div>272219192222</div>				<div><div></div><div></div><div></div><div></div></div> <div>242318252219</div>															
	Health & Beauty	<div><div></div><div></div><div></div><div></div></div> <div>212830332628</div>				<div><div></div><div></div><div></div><div></div></div> <div>557165518650</div>				<div><div></div><div></div><div></div><div></div></div> <div>262631302212</div>				<div><div></div><div></div><div></div><div></div></div> <div>676947793837</div>				<div><div></div><div></div><div></div><div></div></div> <div>373034273025</div>				<div><div></div><div></div><div></div><div></div></div> <div>605346525632</div>															
	Chilled & Frozen	<div><div></div><div></div><div></div><div></div></div> <div>173111181421</div>				<div><div></div><div></div><div></div><div></div></div> <div>292620172822</div>				<div><div></div><div></div><div></div><div></div></div> <div>20181113146</div>				<div><div></div><div></div><div></div><div></div></div> <div>2023131778</div>				<div><div></div><div></div><div></div><div></div></div> <div>221919152015</div>				<div><div></div><div></div><div></div><div></div></div> <div>161818221916</div>															
	Fresh	<div><div></div><div></div><div></div><div></div></div> <div>172214151618</div>				<div><div></div><div></div><div></div><div></div></div> <div>157108136</div>				<div><div></div><div></div><div></div><div></div></div> <div>16431016</div>				<div><div></div><div></div><div></div><div></div></div> <div>2919222587</div>				<div><div></div><div></div><div></div><div></div></div> <div>342426222420</div>				<div><div></div><div></div><div></div><div></div></div> <div>242415202520</div>															
	Electrical	<div><div></div><div></div><div></div><div></div></div> <div>11</div>				<div><div></div><div></div><div></div><div></div></div> <div>111111</div>				<div><div></div><div></div><div></div><div></div></div> <div>111</div>				<div><div></div><div></div><div></div><div></div></div> <div>35411</div>				<div><div></div><div></div><div></div><div></div></div> <div>112121</div>				<div><div></div><div></div><div></div><div></div></div> <div></div>															

Aeon Wellness only focus on the monthly big mailer promo and had reduced mailer issue like (4 days special) after MCO

Average Mailer Features

		watsons						guardian						CARING [®] PHARMACY						AEON Wellness					
		2019				2020		2019				2020		2019				2020		2019				2020	
		Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2
Frequency of Mailer		Monthly				Monthly				Monthly				Monthly				Monthly				Monthly			
No. of Mailer Issued		4	3	3	3	4	3	4	5	6	2	4	5	4	5	1	2	3	2	13	11	14	15	17	4
Average No. Of Feature Per Mailer		431	553	561	597	588	620	402	345	426	750	443	403	210	181	405	413	258	212	49	79	67	53	71	221
	Grocery	12	20	18	30	17	27	17	12	15	32	13	12	21	13	41	54	24	30	2	4	2	3	2	10
	Household	9	7	5	8	10	11	2	1	2	3	2	2	4	3	14	7	7	3						1
	Health & Beauty	409	527	538	558	561	582	383	332	409	715	428	386	185	164	345	351	225	178	47	74	64	50	69	210
	Chilled & Frozen													1	1			1							
	Fresh																								
	Electrical									1		2		1	1	4	2	1	1						

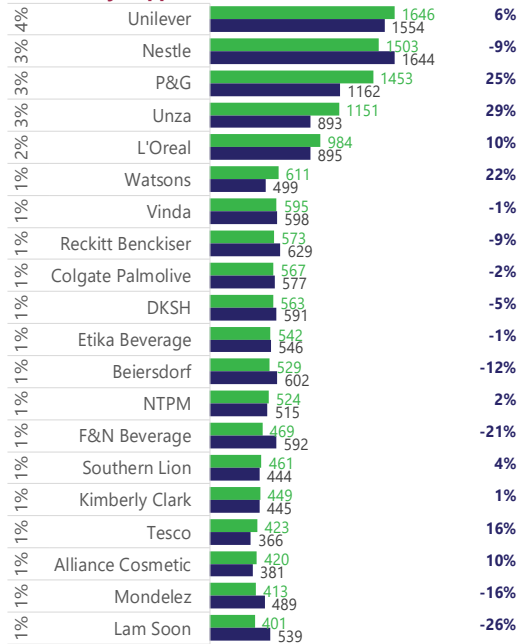
Nestle show decline in promotion features in Mailer, Press & In-store but ranked as the highest promotion supplier in Social Media

House brand (Tesco & Watsons) were heavily promoted in Social Media



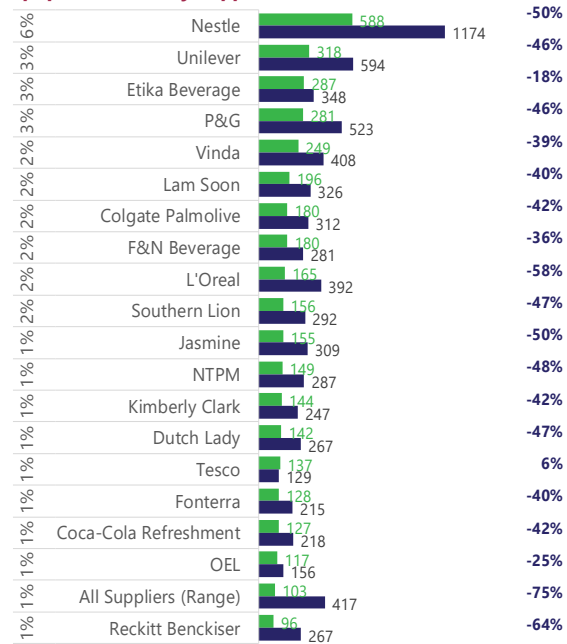
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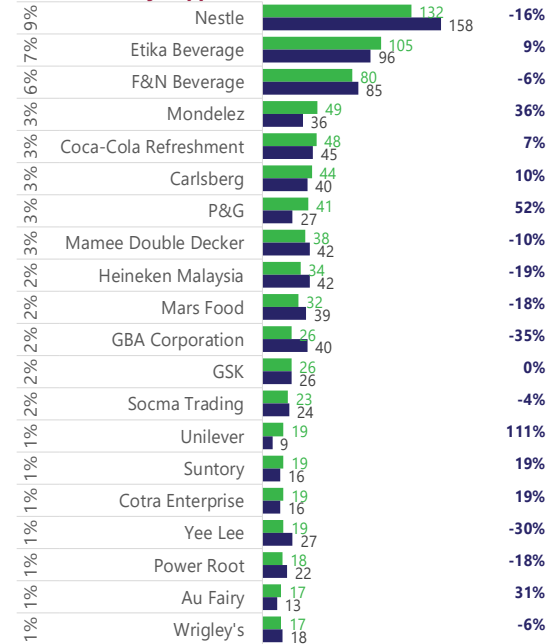


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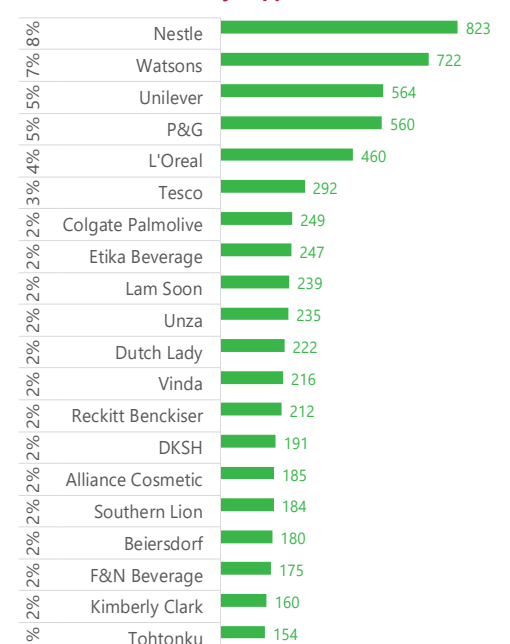
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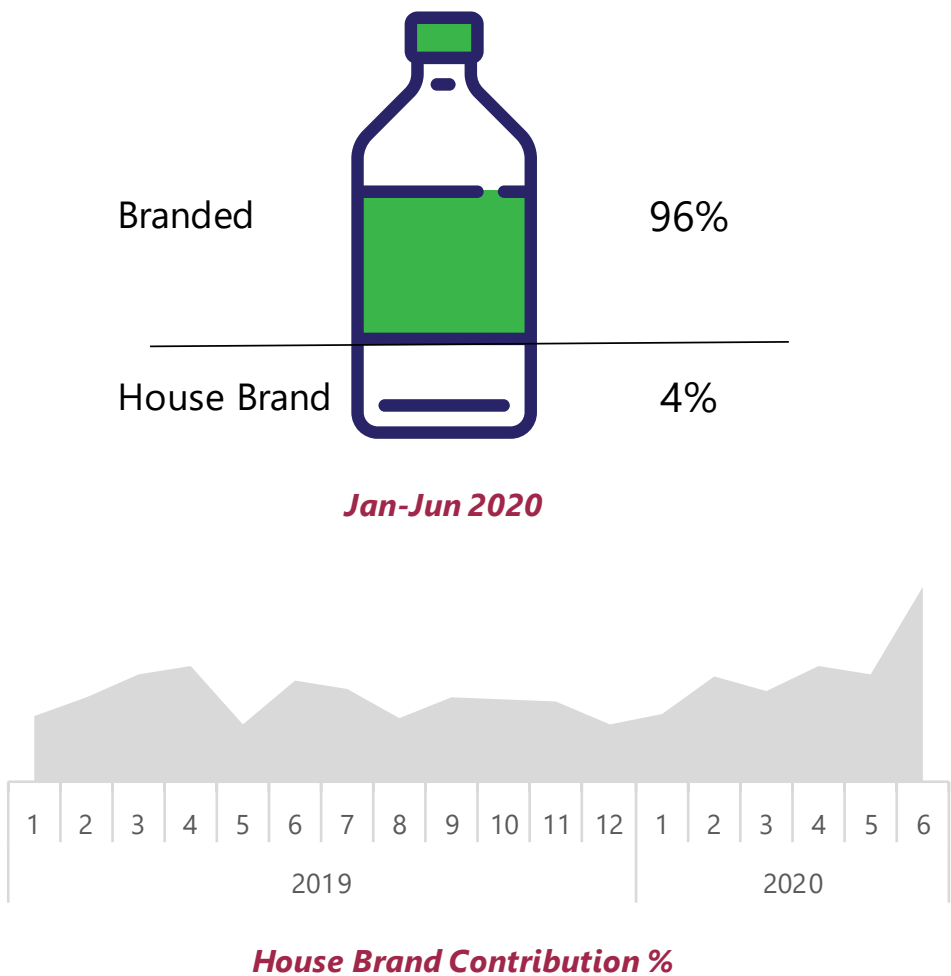
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Social Media Features By Suppliers

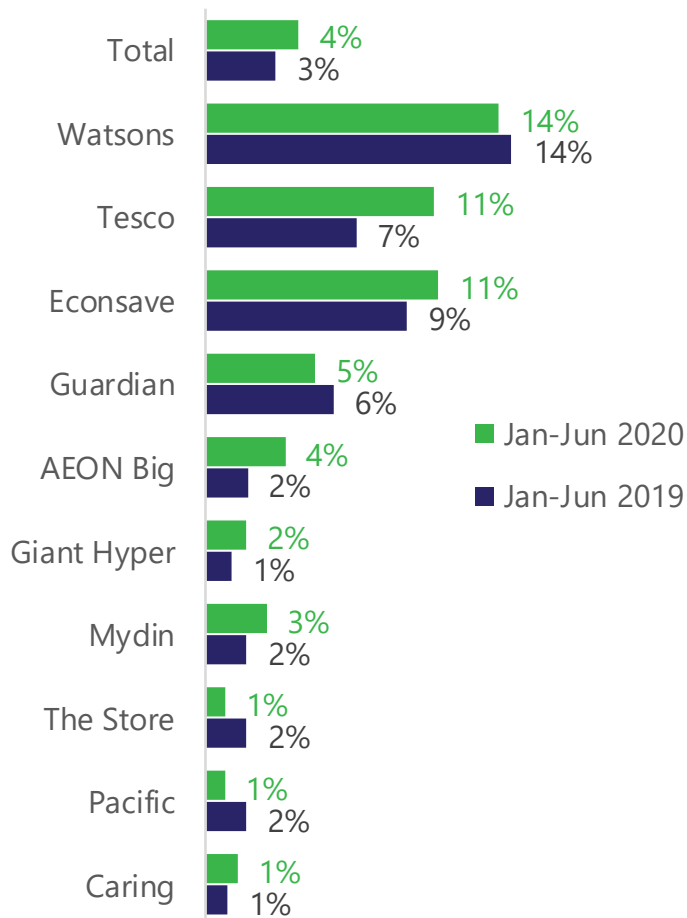


Source: MailerTrack Jan-Jun 2020 vs 2019, Mailer, Newspaper, In Store & Social Media Excluding Regional Data

Overall House Brand promotion grew in most of the key Hypermarket & Supermarket (Tesco, Giant, AeonBig , Econsave, Mydin)



House Brand Contribution % by Retailer

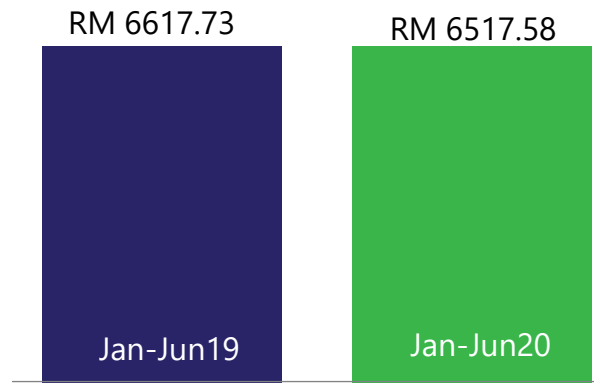


Source: MailerTrack Jan-Jun 2020 vs 2019, Mailer, Newspaper, In Store & Social Media Excluding Regional Data

Overall basket price has slight reduced by 2% vs YAG; HBA categories like Facial Care & Cosmetic average promotion price show increased



(For Top 10 Matching SKUs for the Top 30 categories)

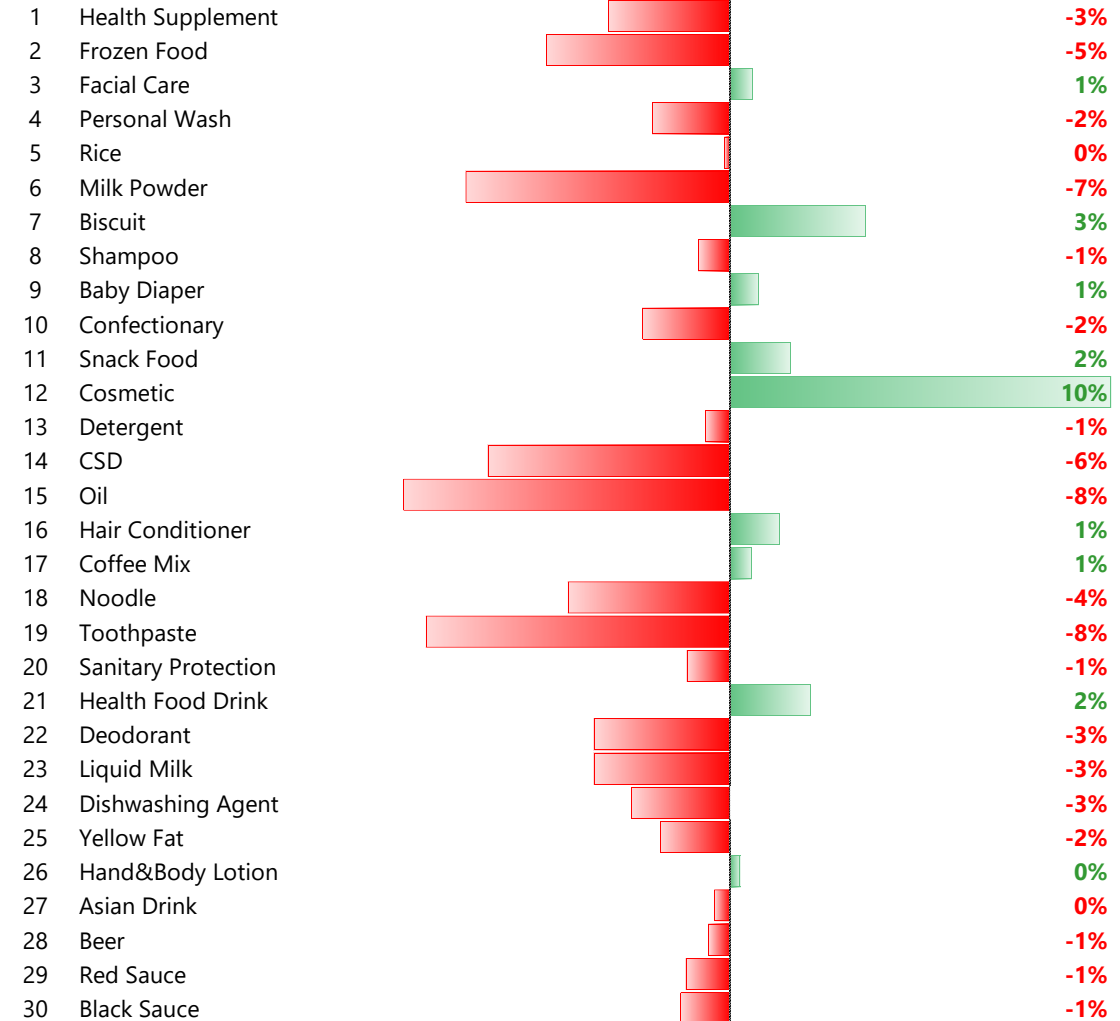


Basket Price Growth Rate for the Top 30 Categories & Top 10 Matched Features

Rank Top 30 Categories

Basket Price for the Top10 Matched Features

Jan-Jun 20 vs 19





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