



**The Silk Initiative –  
Your Bridge to 4.5 Billion Asian Consumers**

the ***silk*** initiative

**The Silk Initiative is an Asia-based brand insight, strategy, and innovation consulting firm specializing in consumer packaged goods.**



# F&B / Wellness / Healthcare



# We're uniquely positioned

TSI is one of the world's few Asia-focused consumer goods specialists sitting at the intersection of **insight, strategy, innovation, and creative** development. We work with partners across research and development, marketing, and consumer insights.



Consumer packaged goods expertise, with a passion for food & beverage, consumer healthcare and personal care



Using insight to develop brand and innovation strategies



Consumer research practitioners



On the ground in Asia-Pacific

# Building assets from data

At TSI, our business is to create and validate **data-driven brand strategy solutions** for our client's Asia-Pacific ambitions.

## Discover

Whether it's about short-term brand diagnostic work or a more comprehensive brand positioning understanding, we take a 360-degree look at the category, your consumers, competitors, and best-in-class approaches to guide brands like yours.

This provides a complete assessment of the opportunities and risks facing your brand to make you feel informed and competent as a brand owner.

## Innovate

Our proprietary innovation development and visual design approaches bring brand, product, pack and comms platform ideas to life.

This gives your business culturally inspired, relevant solutions that will get noticed in the market.

## Scale

Our rigorous brand validation techniques help our clients understand the measurable return on investment of their brand strategies.

This ensures you have the confidence, excitement, and motivation as a business to maximise your market potential.



# Your partners for growth

A combined experience of 100+ years in technical consumer insights, advanced analytics, design led thinking and innovation, and brand strategy consulting across China, Asia, the United States, and Australia assures our clients achieve exceptional results.





**Discover.  
Innovate.  
Scale.**

**TSI Framework**



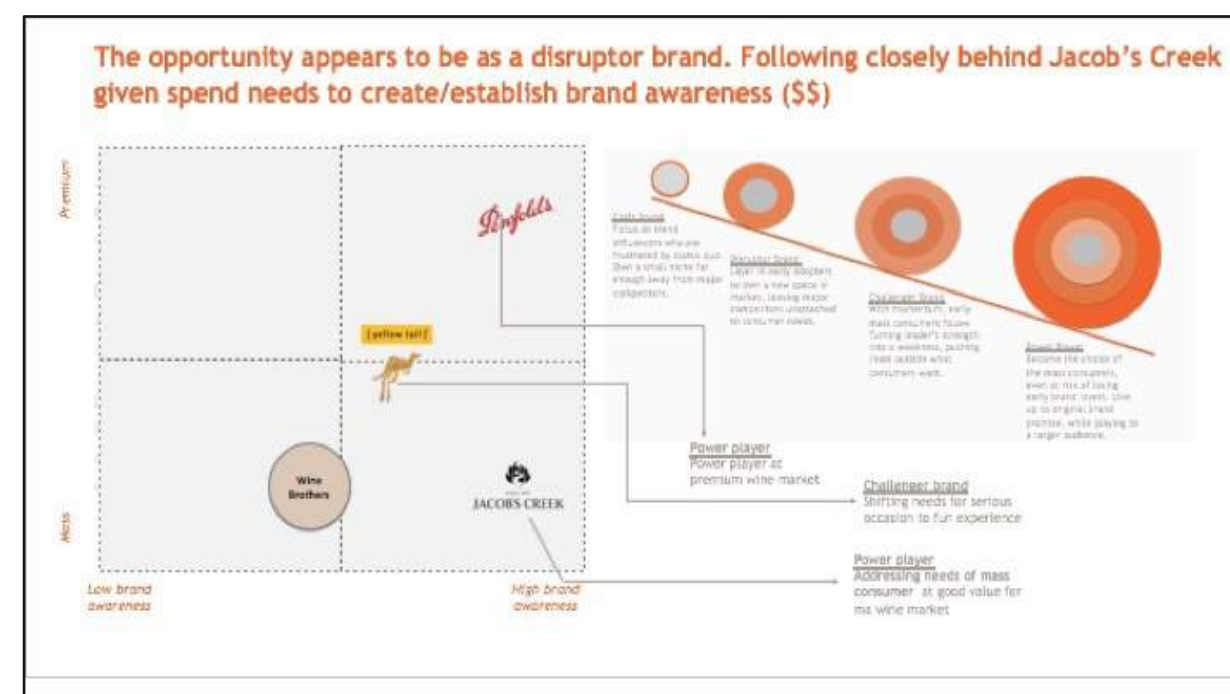
# **Discovery at TSI in focus**



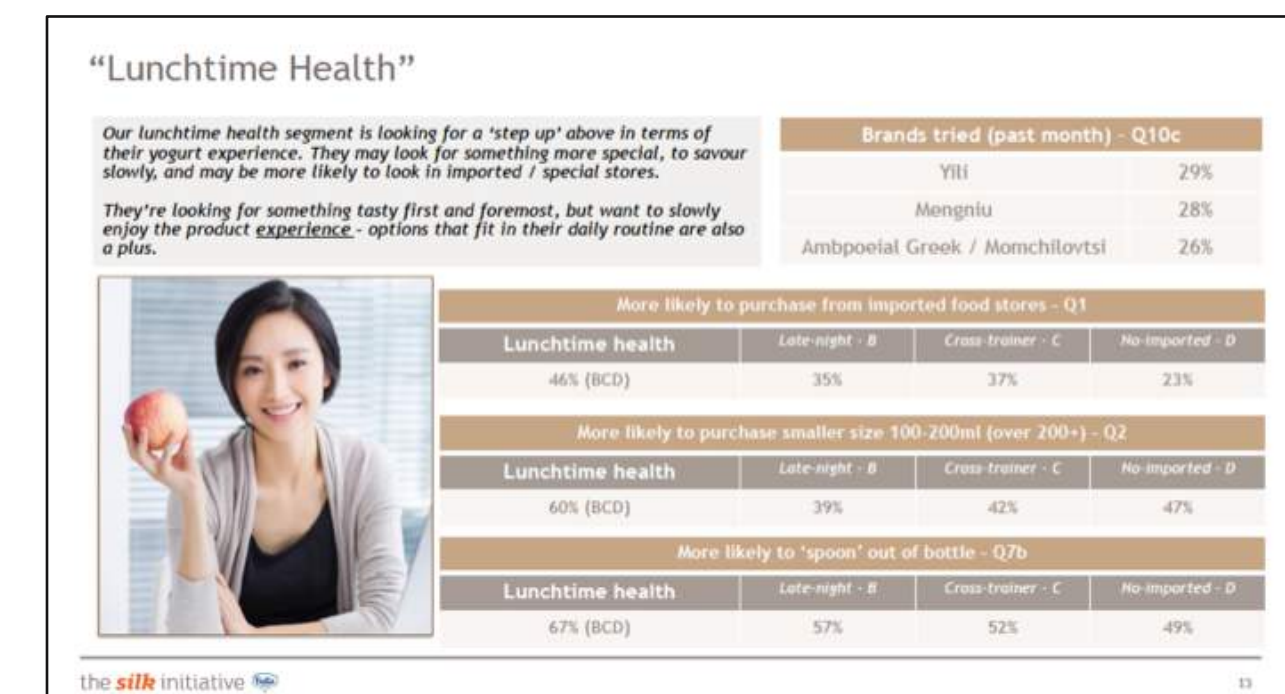
# Getting the fundamentals

We take a 360-degree look at the category, your consumers, competitors, and best-in-class approaches to guide brands like yours.

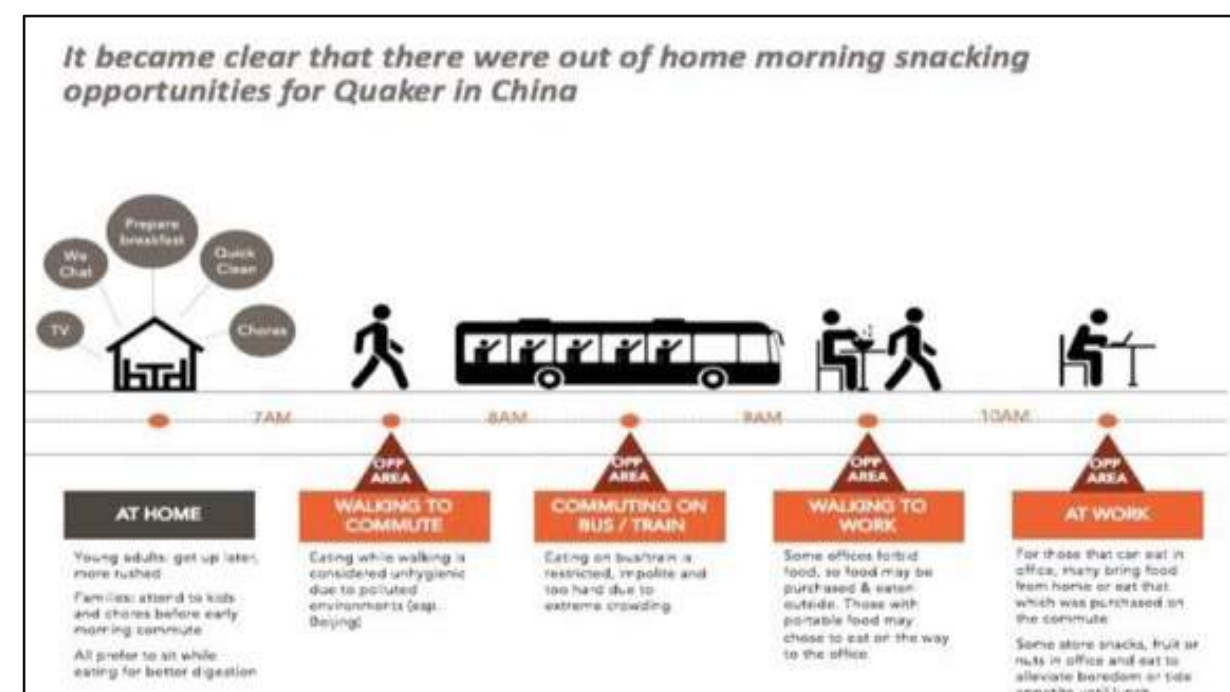
- Desk research & store visits
- Consumer & competitor understanding
- Segmentation analytics
- Channel & shopper behavior analysis
- Stakeholder workshops



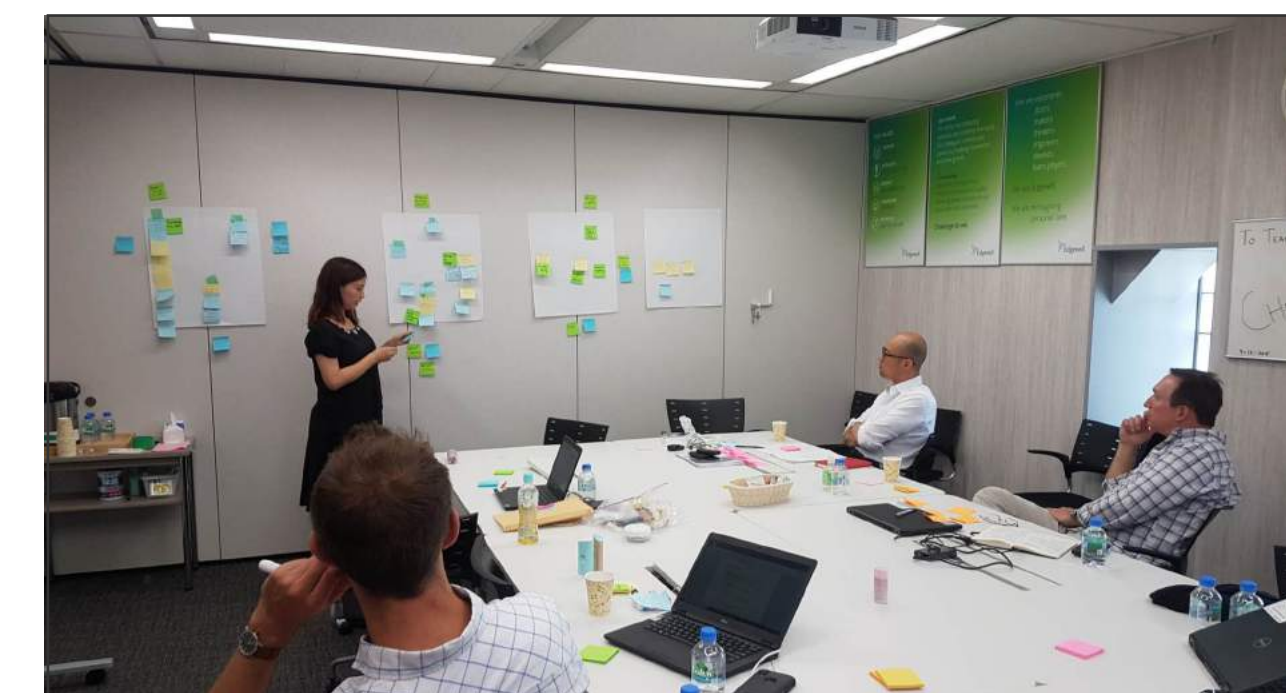
Competitor analysis



Consumer segmentation & understanding



Channel analysis & shopper journey



Strategy workshops



# “Where’s my space to play?”

San Miguel Yamamura Australasia or SMYA is an established leader in packaging and contract wine filling in Australia and New Zealand.

SMYA approached The Silk Initiative (TSI) with the intention of **developing a branded wine offer specifically designed for the Chinese market**, aiming at finding the ‘space’ for SMYA to play, **building up the relevant brand** and **identifying the right product solution** through to visual activation.

In order to do this, SMYA incorporated a new company, named Wine Brothers, specifically targeted at this Chinese opportunity.

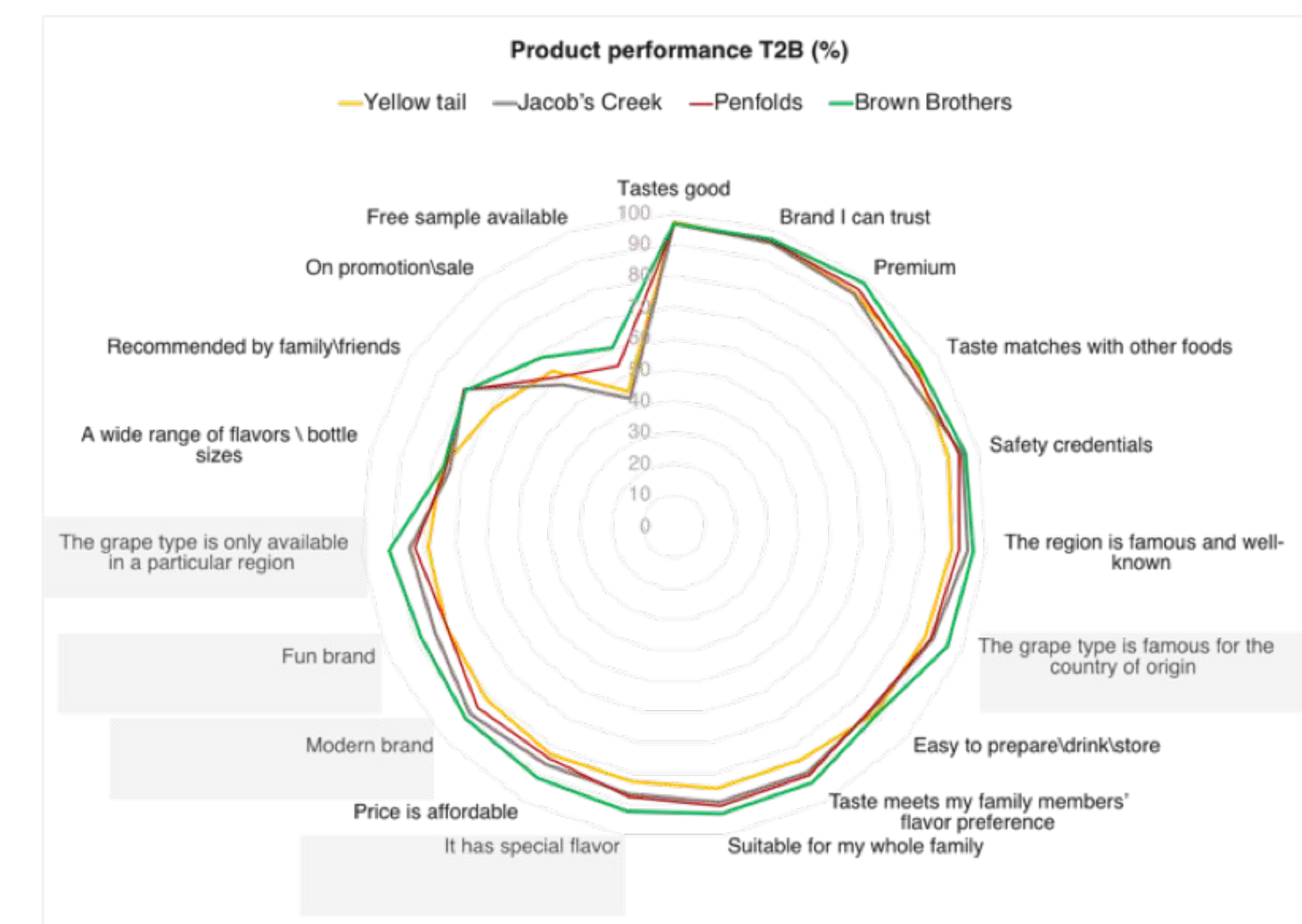
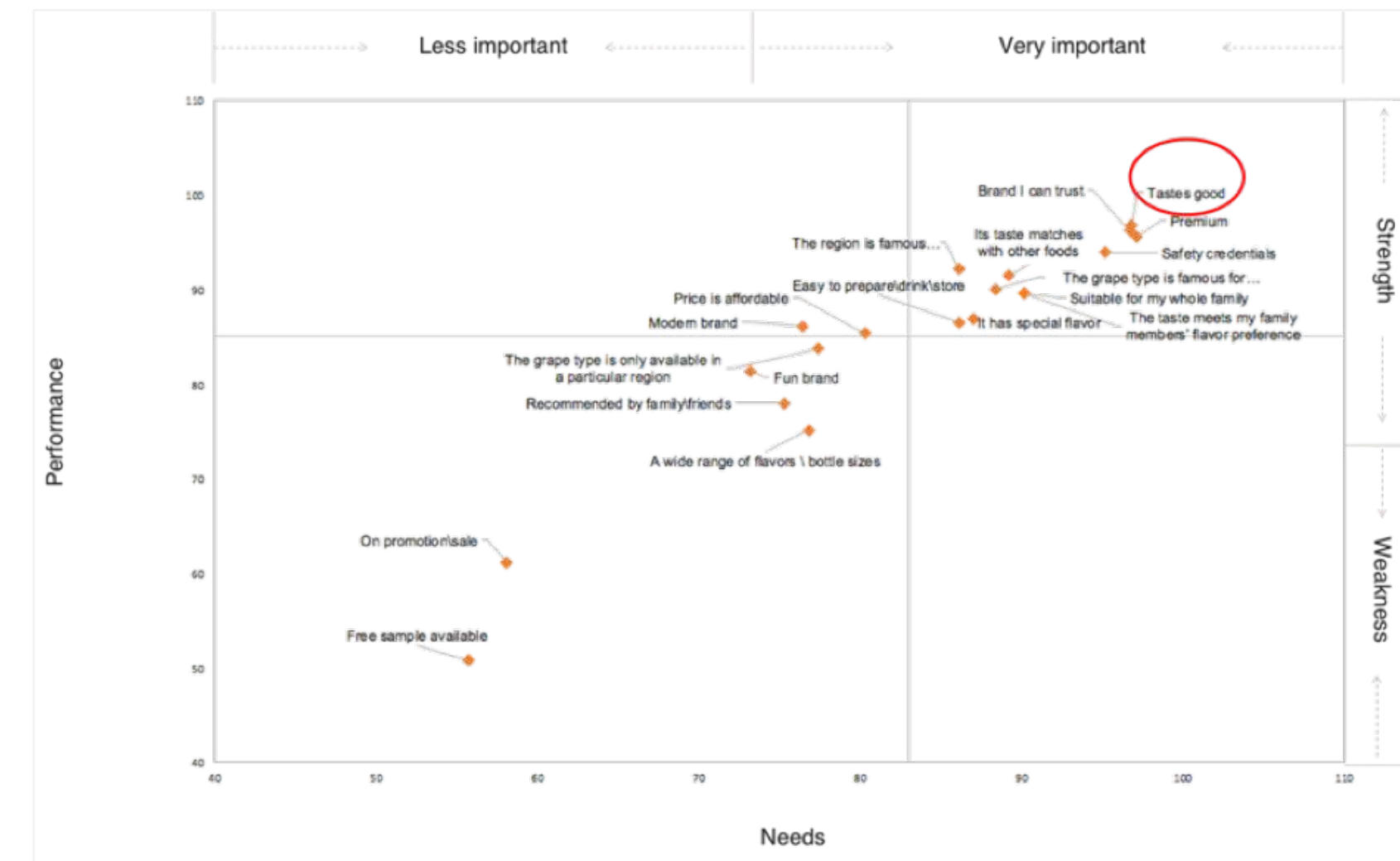




# Gauging triggers and awareness

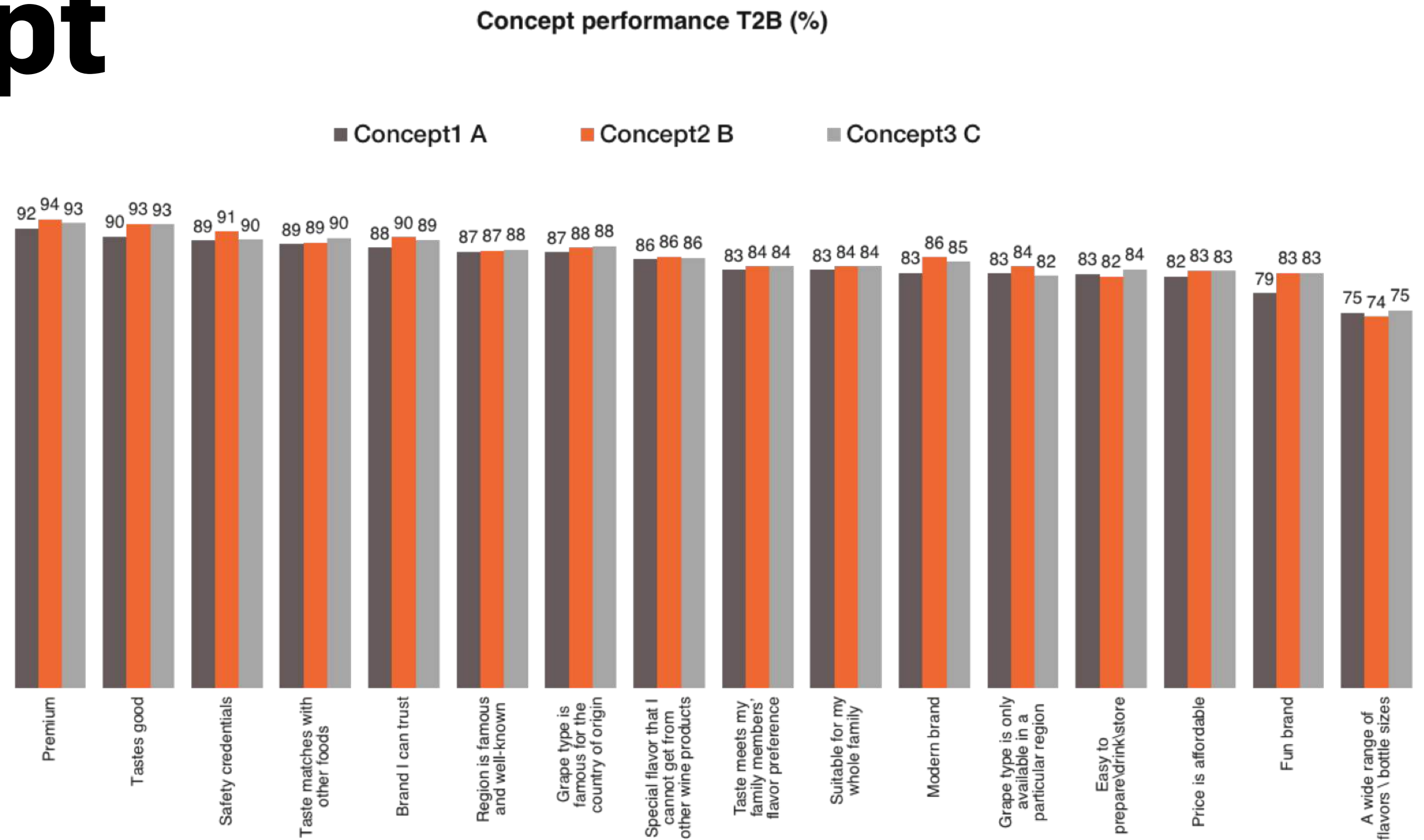
The Chinese wine market is not only growing in terms of sales volume, but is also becoming more diversified. However, with that **we see in our research many wine brands are standing for similar credentials.**

Through an in-depth analysis, TSI identified overall awareness of SMYA brands among Chinese consumers. In addition, **we explored what triggers would persuade consumers to purchase Australian wine.**



# Testing concept performance

TSI then developed three separate **proposition directions** based on target profiling, market analysis, and competitive benchmarking. Our concept testing diagnostics utilizes a range of key performance indicators in order to derive the winning direction to take forward.

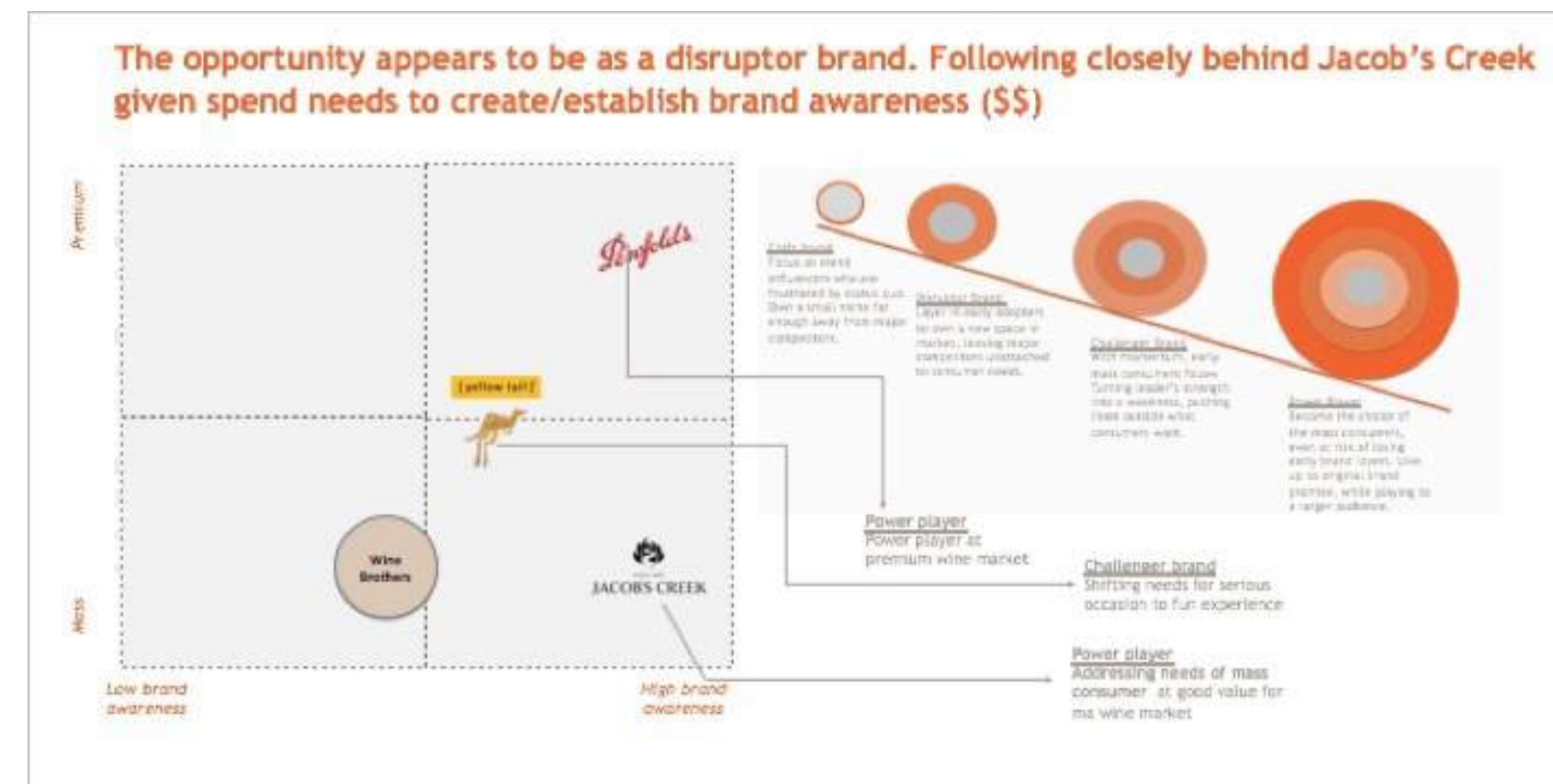




# Bringing data to life

TSI used our emotional and functional frameworks to assist in examining competitors and really bringing data findings to life.

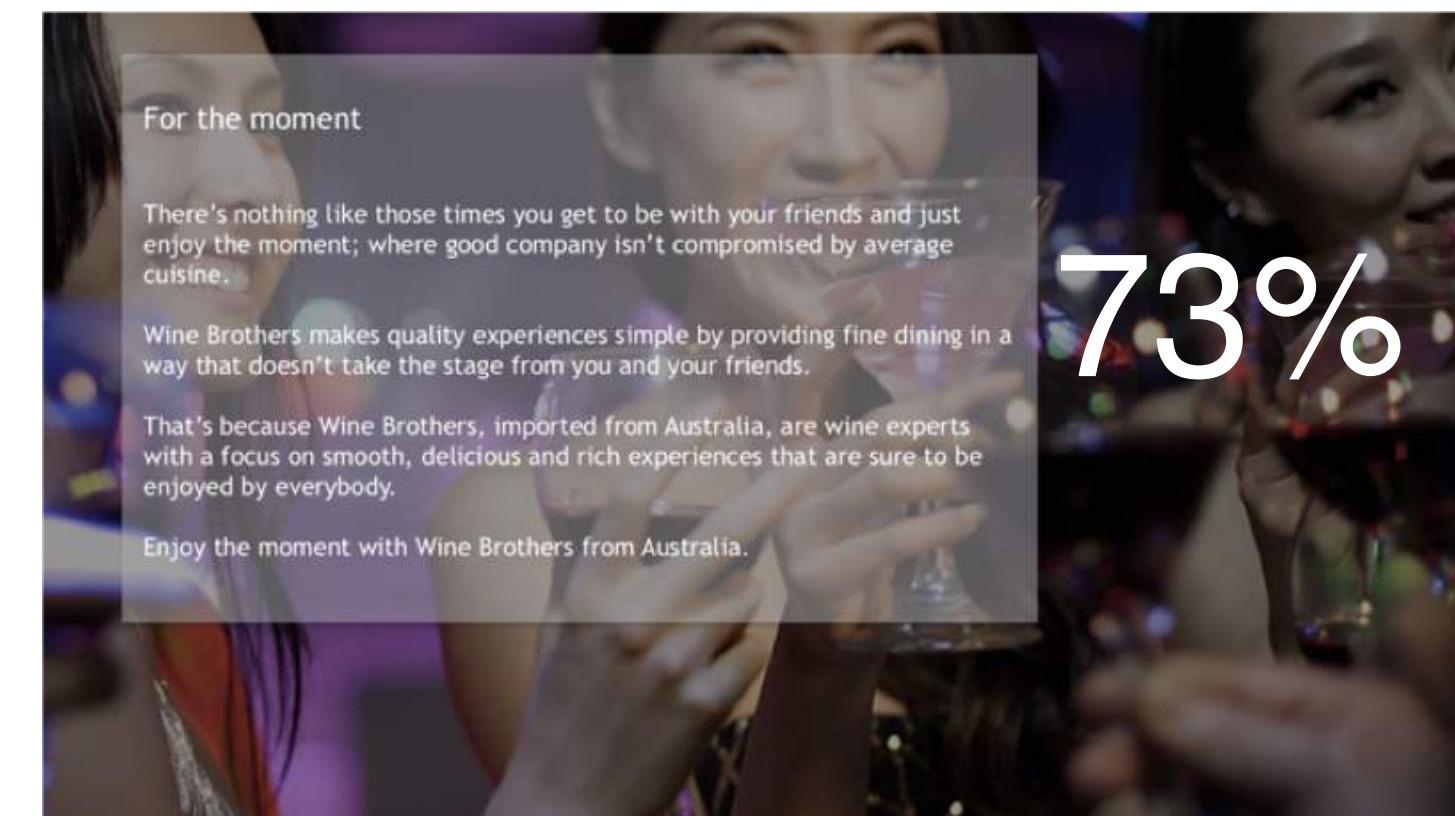
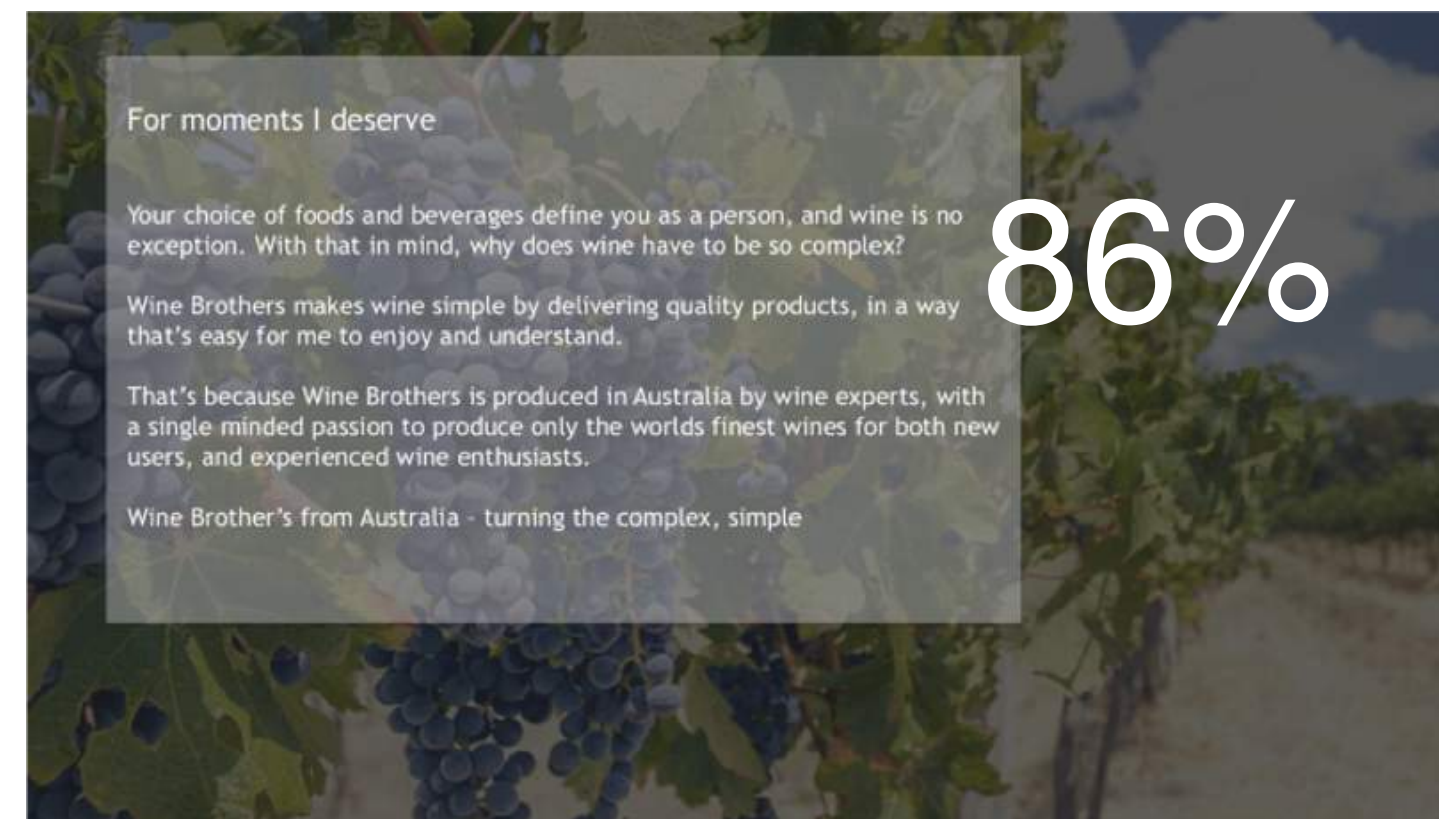
Using these frameworks, we were able to analyse other Australian wines **to determine unfulfilled emotional and functional** needs in the market and where the white space was for a new challenger brand to play – **ultimately leading to the creation of a new brand.**





# Looking to the future

With the overarching proposition landed, we worked with the client partner by recommending concept development directions. The goal was identifying ways to work with consumers to actually **articulate the optimal marketing claims, benefits, and reasons to believe** as a brand to communicate throughout the marketing mix.







# **Innovation at TSI in focus**

# Data in, assets out

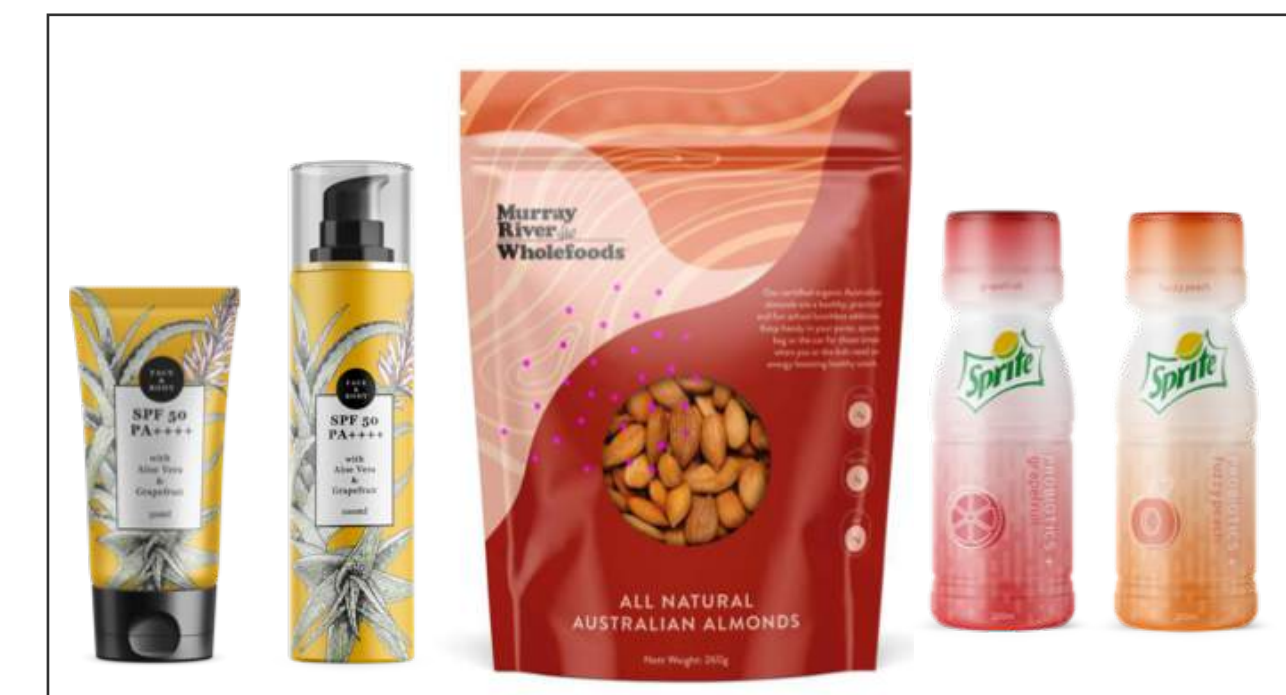
Our proprietary innovation development and visual design approaches bring brand, product, pack and comms platform ideas to life.

This gives your business culturally inspired, relevant solutions that will get noticed in the market.

- Concept development
- Product portfolio development
- Packaging design & localisation
- Naming
- Semiotics
- Branding & visual assets
- TSI IP and licensed tools/processes



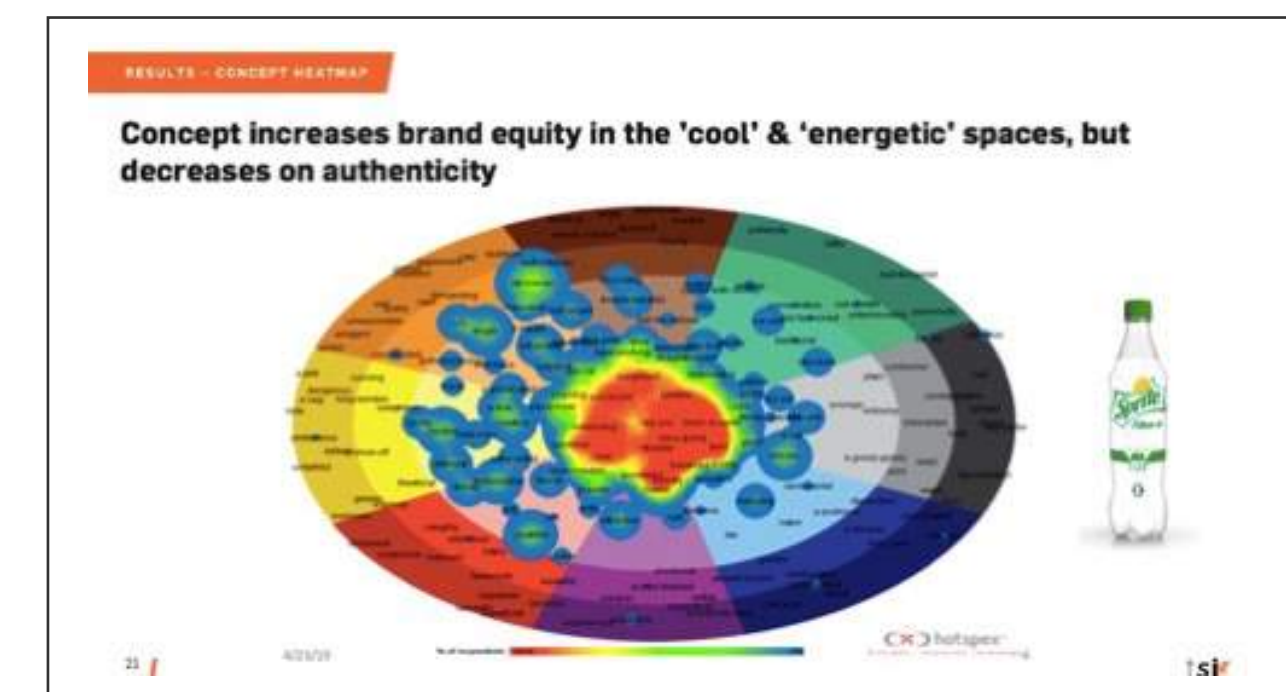
Concept development, writing & visualisation



Packaging design



Brand & product naming

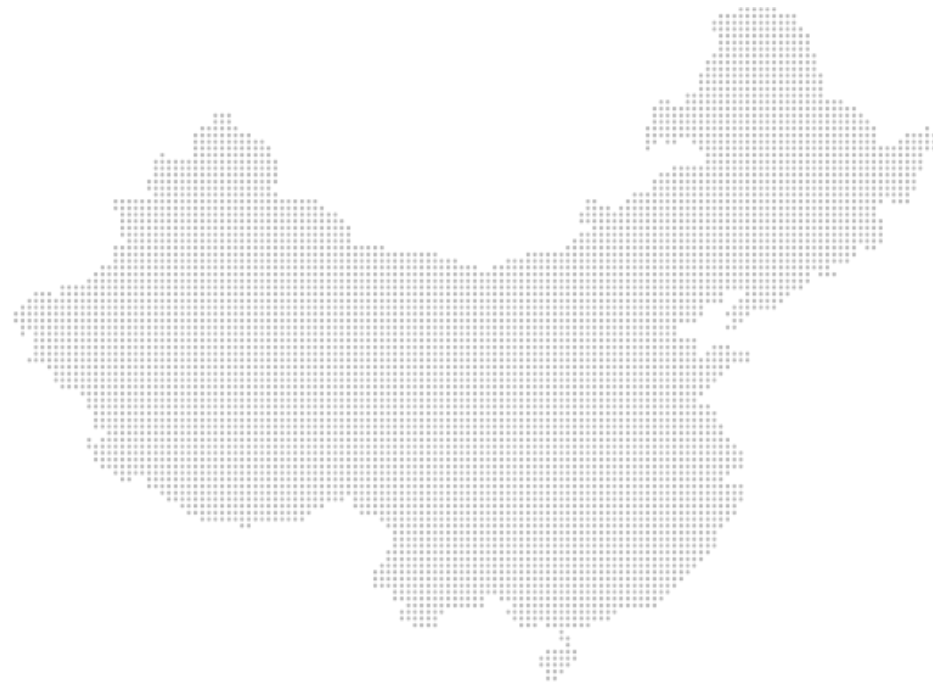


TSI licensed tools & processes



# The only specialised monthly China F&B monitor designed to help clients make smarter commercial decisions

TSI's proprietary Navigator collects, analyses, and visualizes data monthly across multiple leading food bev categories in 8 key regions of China



DEMOGRAPHICS  
CATEGORY PURCHASE DRIVERS  
FLAVOUR FORECASTING  
PRODUCT CONCEPT LAUNCH  
EVALUATION  
FOOD & BEV FUTURE STATES

CATEGORIES

Carbonated drinks, dairy, savoury snacks, confectionery, sweet snacks, functional drinks, ice cream, beer, coffee, tea

KEY CITIES

Shanghai, Beijing, Guangzhou, Chengdu, Harbin, Fuzhou, Xi'an, and Wuhan



10 CHINA PRODUCT  
LAUNCHES EVALUATED EACH  
MONTH

CONCEPT EMOTIONAL/  
FUNCTIONAL PERFORMANCE  
MAPS



REAL TIME ACCESS VIA DASHBOARD  
SUBSCRIPTION



# “How can we succeed in Asia?”

Our client was a personal care brand aiming to increase its share in suncare in China and Japan.

We first immersed ourselves in the category, digging out insights via expert interviews, consumer diaries and focus groups with our target, to understand their habits and attitudes.

We uncovered consumers’ typical routines, beliefs and purchase journey and identified current and potential future trends in both markets that we could focus on for new product development.



## Japanese & Chinese skin care user differences – at a glance

	CHINA	JAPAN
More casual than Japan	While skincare is important, compared to their Japanese counterparts, Chinese consumers tend not to be as strict with their routines	Very careful about skincare
Air pollution more of a factor	China's higher air pollution leads to concerns over its impact on skin, with products marketed specifically catering to this, including from Day & L'Oréal	For Japanese consumers, good skin is the result of strict daily habits over the long term – each player takes seriously
Preference for global brands	With local brands not particularly strong or trustworthy, Chinese consumers place more value on foreign brands – particularly Japanese & Korean	Key role for make up
		Young Japanese consumers tend to put make up more so than their Chinese counterparts – sun care comes with it, instead of being a separate step

## Focus is on five key occasions – particularly face

Face UV care products, particularly for daily use, present the most lucrative opportunity

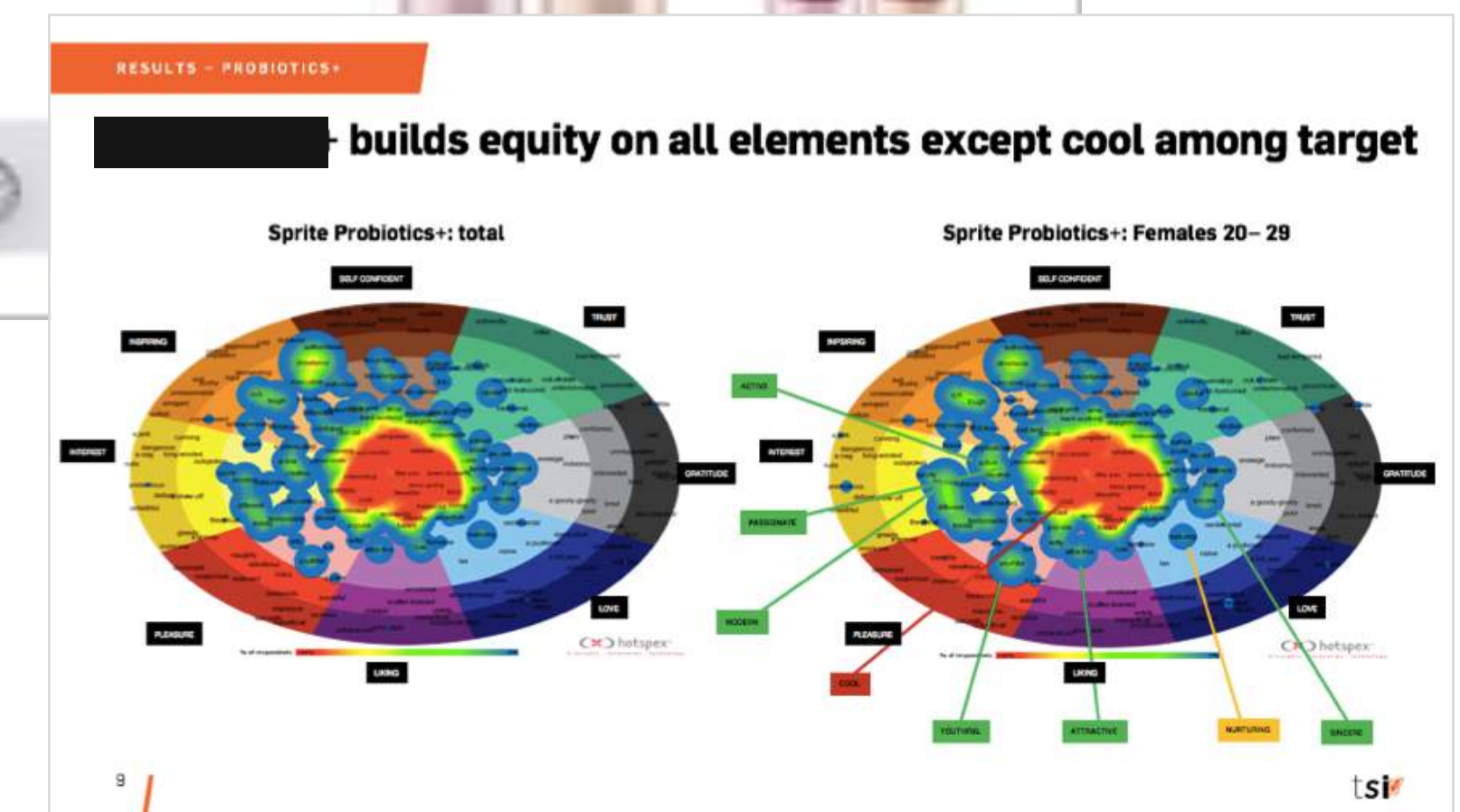
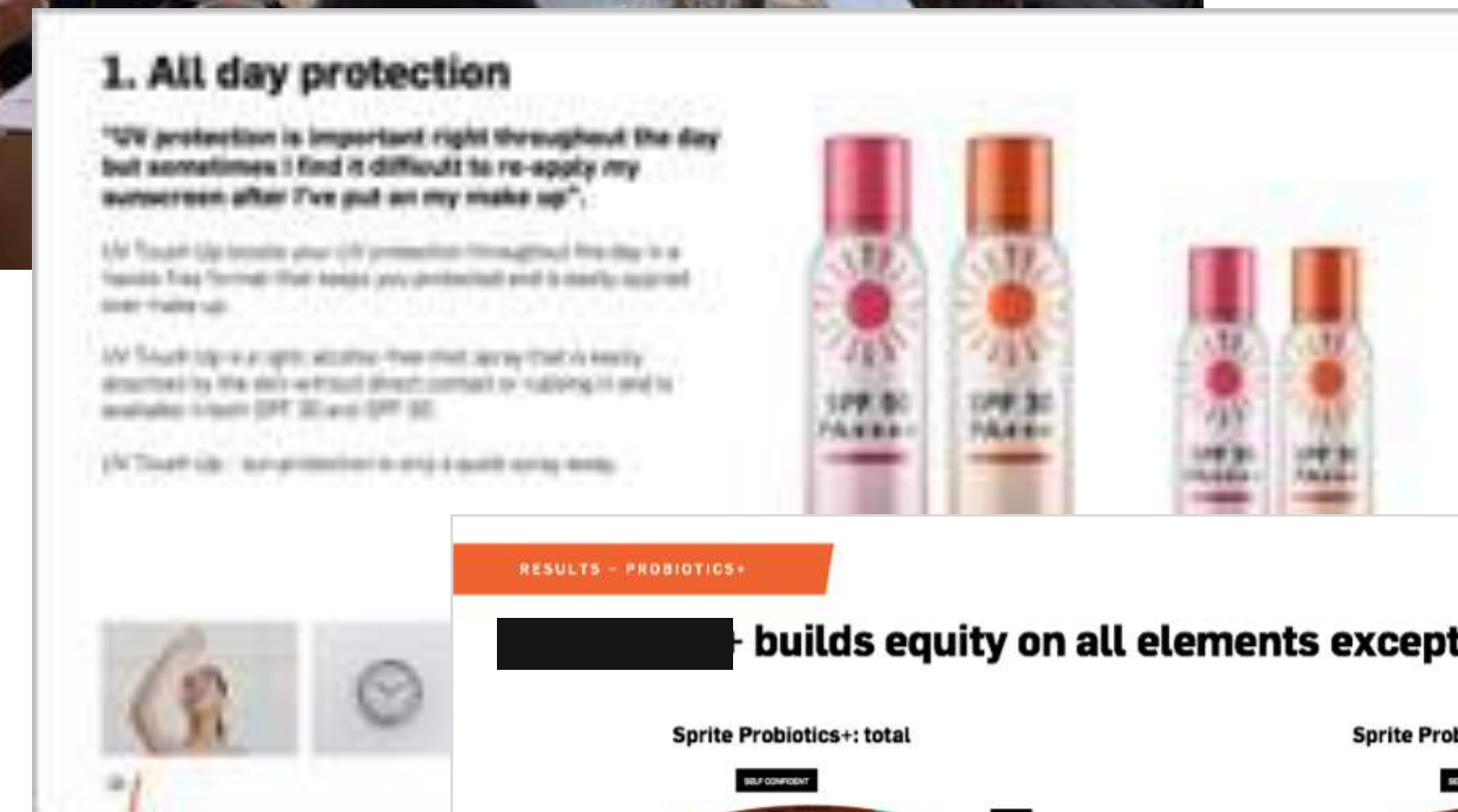
	Summer – weekday	Summer – weekend	Winter
Face	Concerns	Sun during daily commute; PM 2.5 and blue light from screens (minor)	Constant sun exposure throughout the day; having to reapply
	Issues	High SPF/PA irritate skin & cause burden; sweating after application	Need highest protection available; UV care coming off from water or sweat; incompatibility with makeup
	Application	In the morning before work with little re-application. Little re-application during the day	In the morning before going out; reapplication throughout the day as necessary, but reluctantly
Body	Current solution(s)	Lighter dedicated UV care product / skincare product with SPF; umbrella; avoiding sun	Thicker, dedicated UV care product; hat; umbrella
	Concerns	Sun during daily commute on uncovered body parts	Constant sun exposure throughout the day on uncovered body parts
	Issues	High SPF/PA irritate skin & cause burden; don't want to spend too much money given lower priority	Need highest protection available; UV care coming off from water or sweat; don't want to spend too much money given lower priority
Body	Application	In the morning before work with little re-application	In the morning before going out; reapplication throughout the day every 2-3 hours
	Current solution(s)	Lighter dedicated UV care product; clothing coverage; umbrella; nothing	Thicker, dedicated UV care product; clothing coverage; umbrella; avoiding sun



# Guiding the future

Based on the findings and insights from the research, we conducted a workshop with the brand teams to identify the key big ideas to focus on, from which we created four product concepts with accompanying packaging visualizations.


We then co-created a further 9 concepts, which we tested via a series of online surveys with consumers to identify those products with the greatest potential for success across both China and Japan.





### Smart Start

Kids today are getting smarter, but at a cost. Pāmu's CogniBright, with it's patented formula, can help mitigate the harmful effects of blue light on young developing eyes to keep kids seeing the world as they should.



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Big idea development

### Kjeldsens Mini Bites

**Product Statement**  
Kjeldsens Mini Bites are pouches containing mini cookies in a resealable pouch that are easy to share in the office or with friends. These come in exclusively fruity flavors, or chocolate, to provide consumers with different flavor options.



Product: Lifted from Royal Dansk portfolio  
Pack: Redesign needed

Concept writing

BI1

### THE BEAUTY OF BUTTER

### 黄油奶香 美味曲奇的灵魂

- 纽西兰以盛产高品质黄油著称，其中的优品黄油是包含20%液态黄油，色泽份外金黄、味道更富浓郁黄油香。
- 蓝罐曲奇只采用纽西兰生产的优品黄油，以确保曲奇维持最佳品质。



Communication platform development

CONCEPT TESTS

### Functional concept

**Product description**  
**Soda Probiotic +** restores digestive balance, containing over **10 billion friendly probiotics** that **aid healthy digestion** with the same refreshing feeling.  
180ml

### Novelty concept

**Product description**  
**Soda Senses +** enables you to experience the unique taste bubbly soda and **enjoy aromatic vanilla** with a burst of sweet chili.  
250ml





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Product ideation



### Far-flung fun - Semiotics

Enjoy the authentic goodness from exotic regions

**Design Signifiers**

- Symbols of exotic regions (e.g. land scape, scenic spot) as the main visuals in graphic design aesthetics in the background
- Relevant elements (e.g. people, animals, tree, bridge) interacting with the background

**Format Signifiers**

- Small size
- Smooth surface preponderance
- Non-transparent
- Shaping to represent the exotic place (e.g. Italian classic coffee pot design as the bottle shape)

### Far-flung fun: Design Mood board

#### CHOCOLATE COATED AUSTRALIAN RAISINS

Our certified organic chocolate covered raisins are a healthy, practical and fun school lunchbox addition. Keep handy in your purse, sports bag or the car for those times when you or the kids need an energy boosting healthy snack.

Semiotic analysis

Packaging design

**We found that we were then able to plot new product ideas to suit consumer needs across the morning**

- More nutritious & filling products are preferred early morning and lighter ones closer to lunch as satiety tapers off.
- We think there may just be an opportunity for Quaker to consider placing more filling soft bakes in supermarkets/hypermarket for breakfast believers and biscuits/bars/bites in convenience channels for regular/impulse eaters

the *slub* initiative

7 AM	8 AM	9 AM	10 AM	11 AM
<b>(PRE) BREAKFAST</b> (GETTING READY/WORKING/STUDYING TO SCHOOL) AWAY FROM TABLE	<b>WALK TO/FROM BUS OR METRO</b> FLATS & BARS Hearty bridge b'l breakfast & lunch		<b>OFFICE ... A.M. TEA BREAK</b> BITES Hyper-convenient mid-morning snacks for office	
<b>SOFT BAKED</b> Portable breakfast augmentation or replacement				
 FILLED OATMEAL YOGURT SQUARES	 FRUIT NUT BAR	 CRISPY OATMEAL BAR	 OAT MINI BISCUITS	
 GRAINS CRISPY BISCUITS	 OATMEAL ENERGY CRISPY	 YOGURT BITES	 ALL-STAY OATMEAL BITES	
 WHOLEGRAIN MINI LOAF / MINI "SU" CAKE				
NUTRITIOUS	FILLING	HEALTHY / NUTRITIOUS	HEALTHY / NUTRITIOUS	
MORE FILLING / SATIATING	TASTY	PORTABLE	NOT SMELLY	
QUICK	LIGHT FLAVOR	EASY TO CARRY	NOT TOO FILLING	
HYGIENIC	CONVENIENT SIZE	NEW TASTES	SMALLER PORTIONS TO TIE CRAVINGS	
CONVENIENT		NO STRONG SMELLS		

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Full pipeline development

TEMPLATE FOR CLIENT PRESENTATION

### Shortlisted name 1: Zhi Hui (知慧)

# 知慧

**MEANING**

知 (Zhi) means knowledge, 慧 (Hui) has the meaning of comet, and phonematically sounds like 慧 (Hui), whose meaning is intelligence. When combined, 知慧 (Zhi Hui) sounds like 智慧 (Zhi Hui), which means wisdom. It is one of the most favored names across two WeChat panels because it is special and artistic, and reflects the function of this milk powder (good for brain) as well.

**ATTRIBUTES**

- Evoke a sense of wisdom, brightness, and aspiration
- Conjures an image of a shiny comet across the sky

**"慧 (Hui) is a uncommon character, makes me feel the product is different, special, meaningful, high-spirited, attractive, and premium, and also reminds me of bright stars"**

– Consumer

**"This sounds like it can help with brain development"**

– Consumer

Naming

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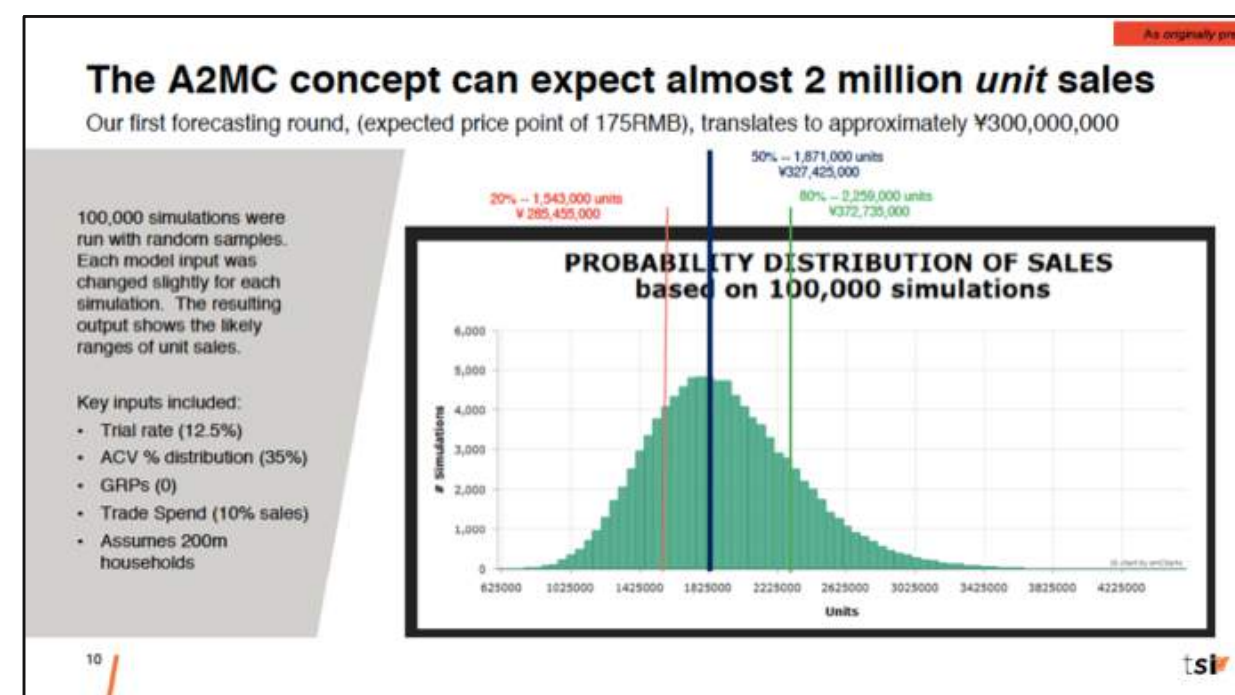
**Scale at TSI  
in focus**

# Sizing the opportunity

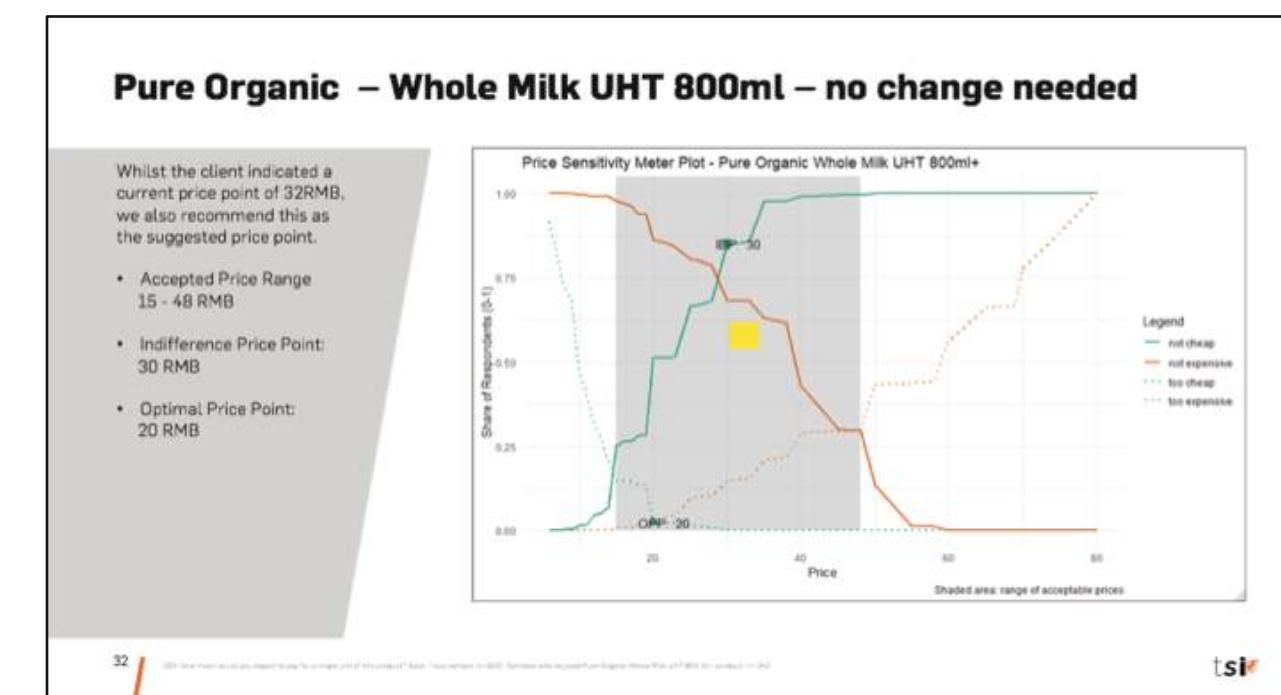
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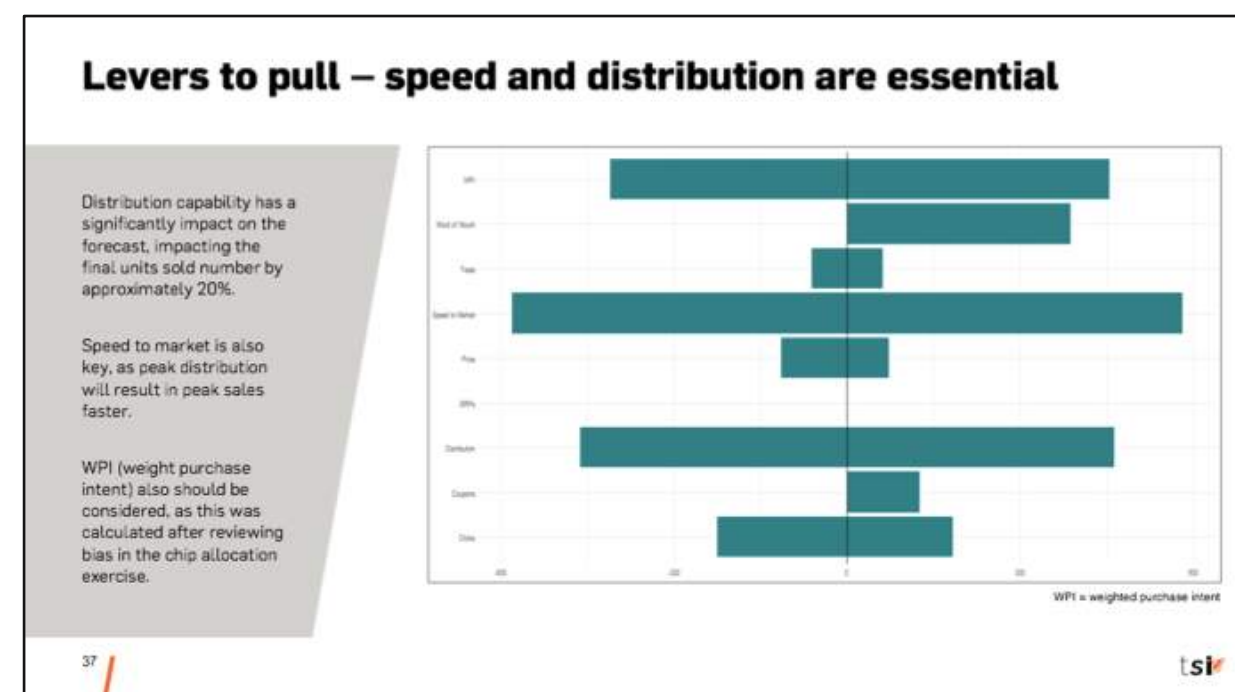
- Volumetric forecasting
- Channel and segment sizing & ROI
- Portfolio optimization



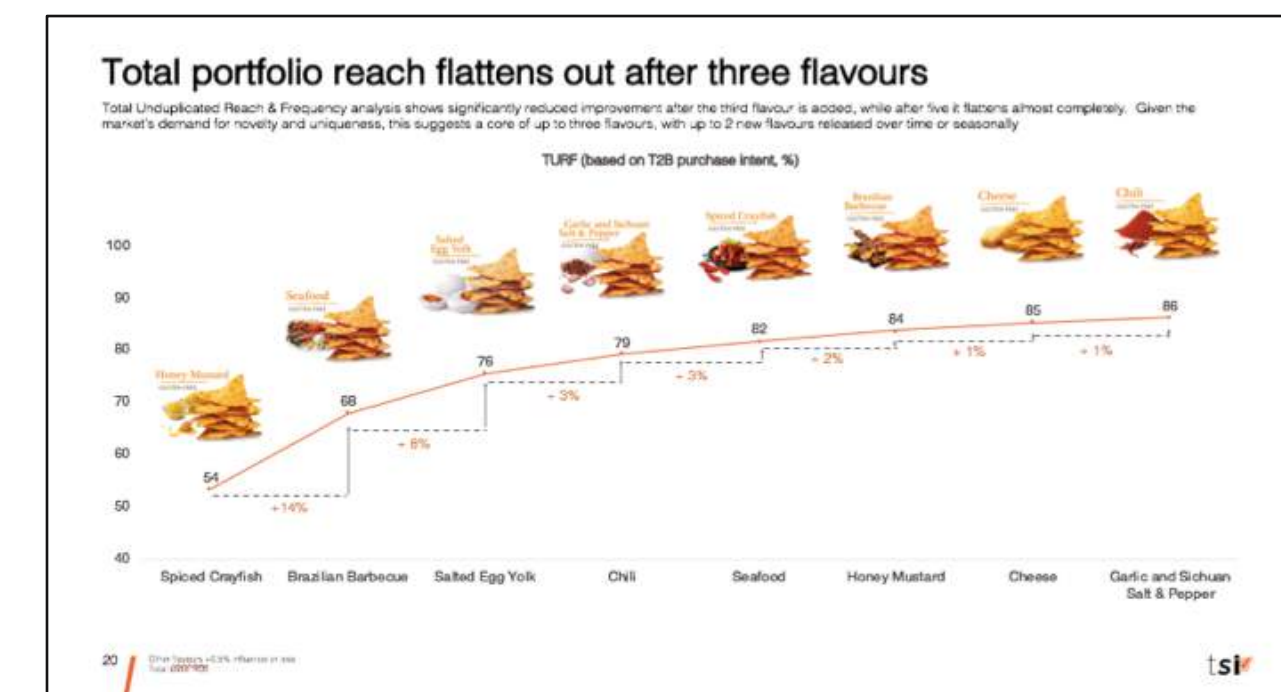
Volumetric forecasting



Pricing analysis



Channel & segment sizing



Portfolio optimization



# Understanding category & consumer

We profile consumers and brands currently used, in order to understand more around which types of consumers were purchasing which types of brands.

This informed our client in terms of which brands in the market were close in competitors, and which brands were seen as distinctively different from a consumer point of view.

This perceptual map shows where each brand sits based on purchase behavior and where there may be opportunities for each segment.

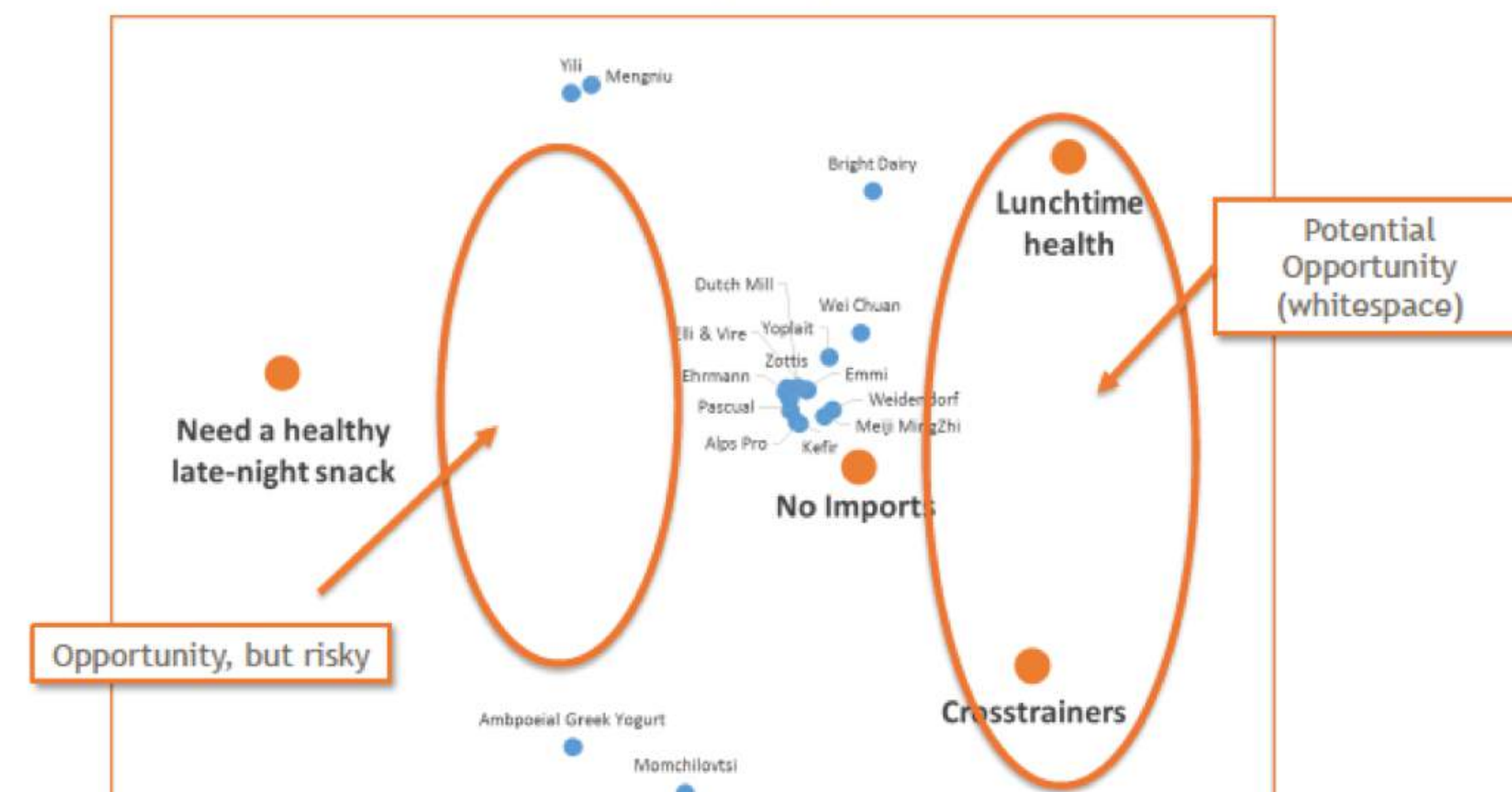
Our lunchtime health seekers may be more loyal to Chinese players, such as Bright Dairy, Yili, Mengniu, but may also experiment with the wider range of brands in the center.

Our cross trainer also experiments with some of the wider brands, but uses Ambpoeial Greek Yogurt and Momchilovtsi when it comes to their choice of Chinese power players.

Our healthy late night snacker mainly uses the big 4 Chinese brands, though are split between Yili / Mengniu vs. Ambpoeial / Momchilovtsi. Though there is a space here, we feel this may be dominated by Chinese players.

## Market Structure - how they're buying (Q10c)

Drinkable Yogurt Market  
Structure in China  
All Segments





# Landing the concept

We then work through different concept solutions to ensure our messaging is laser focused on our consumer target, and our product is exciting consumers by offering something with a key point of difference.

**NEW**

**a2 Smart Milk™**

New a2 Smart Milk™ is a modified milk powder that allows you to support the **natural** development of your child with a **natural**, nutrient rich and balanced milk drink that's **easier to digest than regular milk**.

a2 Smart Milk™ is made from all natural a2 Milk® from Australia which only contains the rare A2 protein, and 8 essential vitamins and minerals to support healthy growth, eye and brain function.

Add 1 scoop to 1 cup of water and your child will feel the difference.

a2 Smart Milk™ - happier tummies for smarter growth.

Zinc and Iron for brain and eye function

8 essential vitamins and minerals to support healthy growth

Made with easier on digestion A2 protein\*

No artificial colors, flavors or preservatives

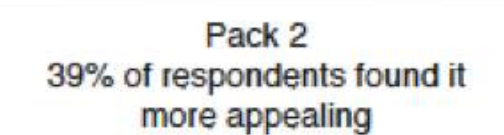
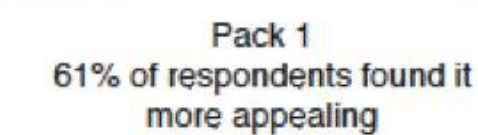




After landing brand and product proposition, we work across the marketing mix to determine how to really resonate with consumers across pack format, design, pricing strategy and proposition.

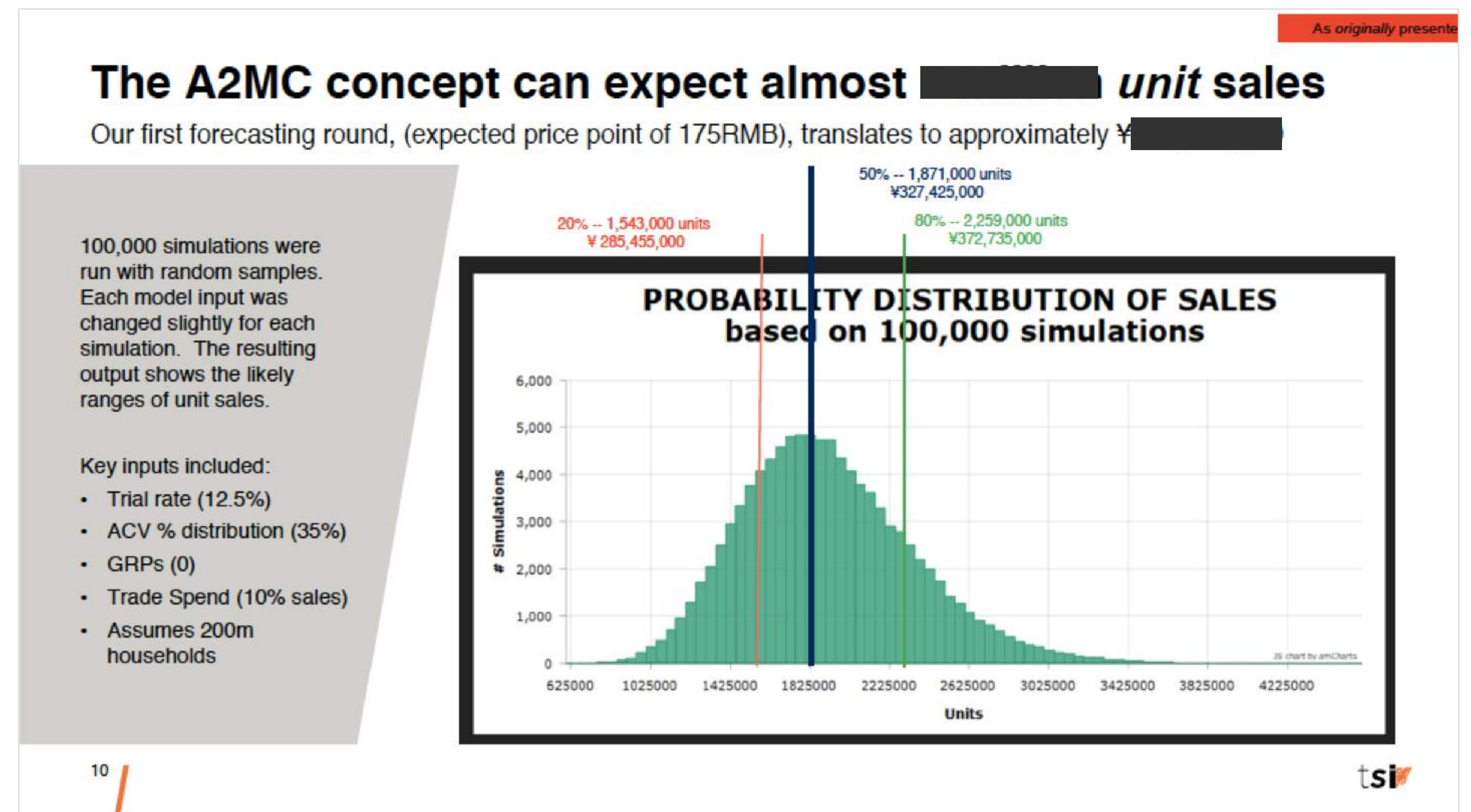
English text keeps the foreign, imported feel

The bilingual version keeps the English text on the pack, reinforcing the notion of "imported from a foreign brand", as well as have the Chinese explanation for mums to understand.



# Sizing the prize

By asking consumers their stated purchase intent, price point, purchase frequency and brand replaceability, and combining this with estimated marketing spend, channel distribution capability and intended promotional strategy, we can forecast the estimated source of volume, size of prize, and units sold.





# Bringing to life

As a result of our partnership, our client received a consumer validated proposition, product design, marketing mix strategy, in addition to the commercial forecasting needed to present a business case internally to make their new brand and product portfolio a reality.



Melbourne intl. Airport.



# CONTACT

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