



Crisis 危机

A person is shown falling through a large, irregular hole in a concrete ceiling. The person is in mid-air, with their arms and legs outstretched, suggesting a fall or a transition. The background is a bright blue sky with scattered white clouds. The scene is framed by dark, angular concrete structures that form the ceiling and the hole.

“Those who understand their markets and can react quickly to change will be the big success stories of the future”

A tennis player in a white shirt is seen from behind, celebrating a victory by holding a large silver trophy high above their head with both hands. The scene is illuminated by bright stadium lights, creating a dramatic and celebratory atmosphere.

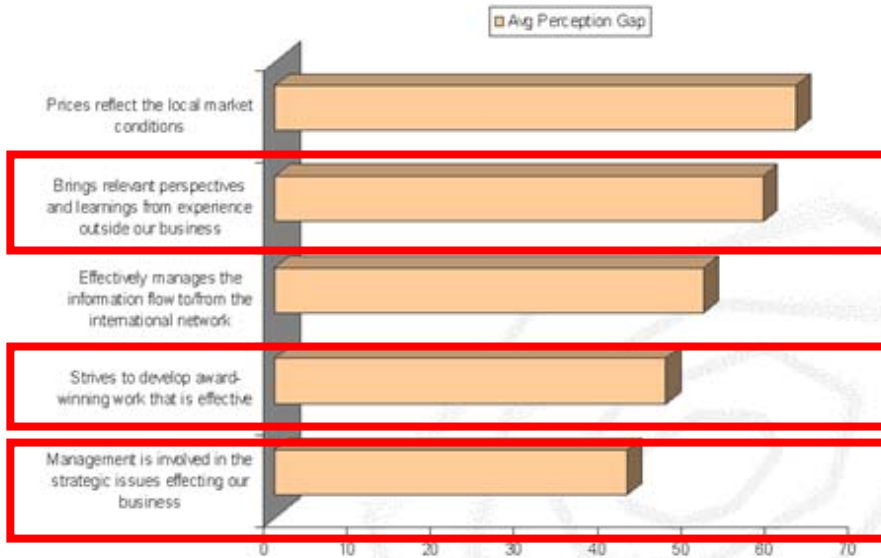
**“The best
business results
are produced by
the best business
relationships
between
marketers and
agencies...”**

Source: www.aprais.com

A study driven by Aprais over 5 years, 1.6 million questions, completed by 15,000 individuals, across 2,000 relationships

Points of disagreement that impact relationship

Top 5 biggest perception gaps
bottom 10%



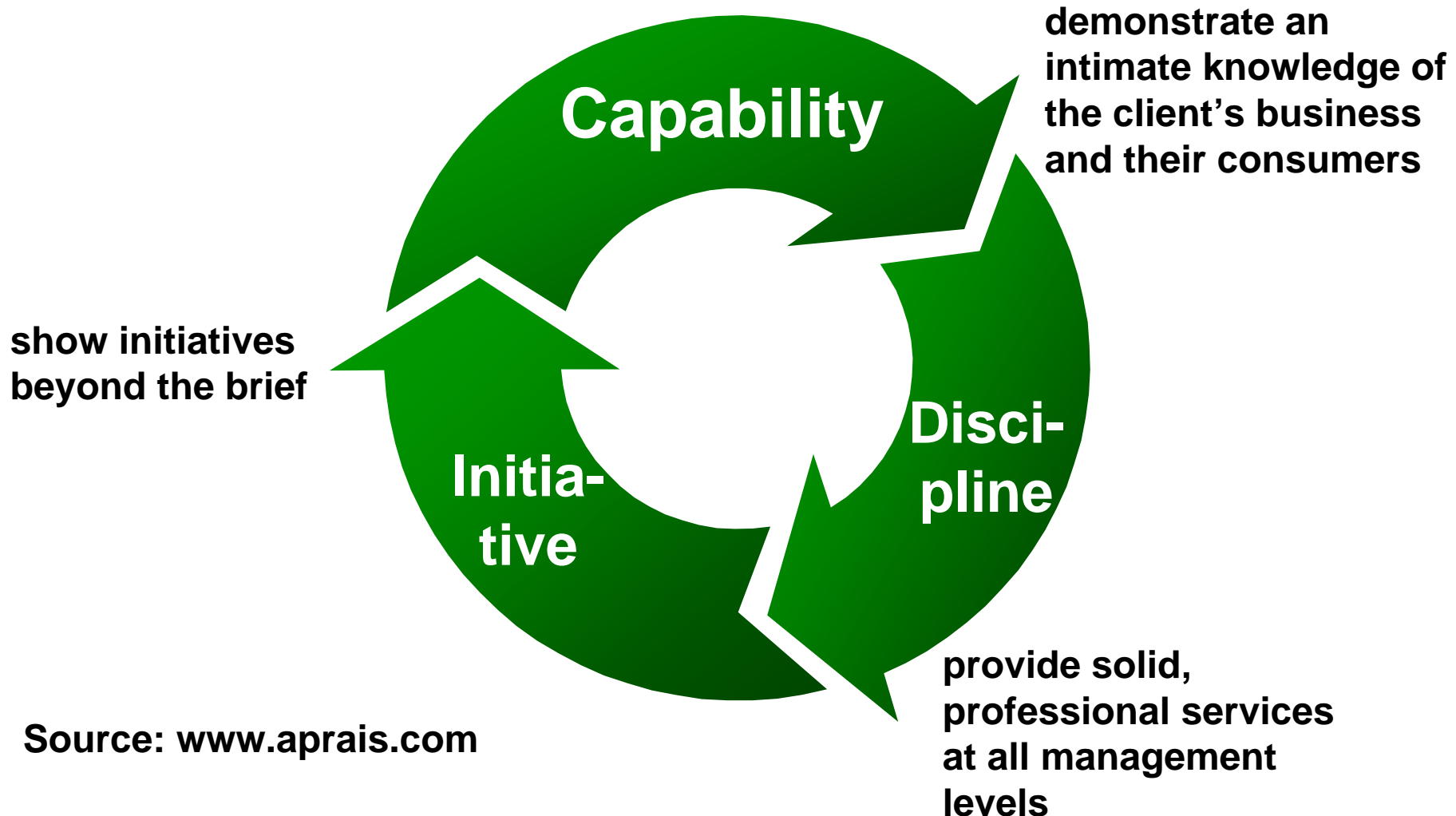
Brings relevant perspectives and learnings from experience outside our business

Strives to develop award-winning work that is effective

Management is involved in the strategic issues affecting our business

Ability to deliver depth & breadth of market insights and draw implications for planning & implementation

Key relationship drivers: agency values



Source: www.aprais.com

Stretching beyond

View
of the market

Professionalism
and capabilities

Reinvention



**Stretch beyond to
the SILVER group**

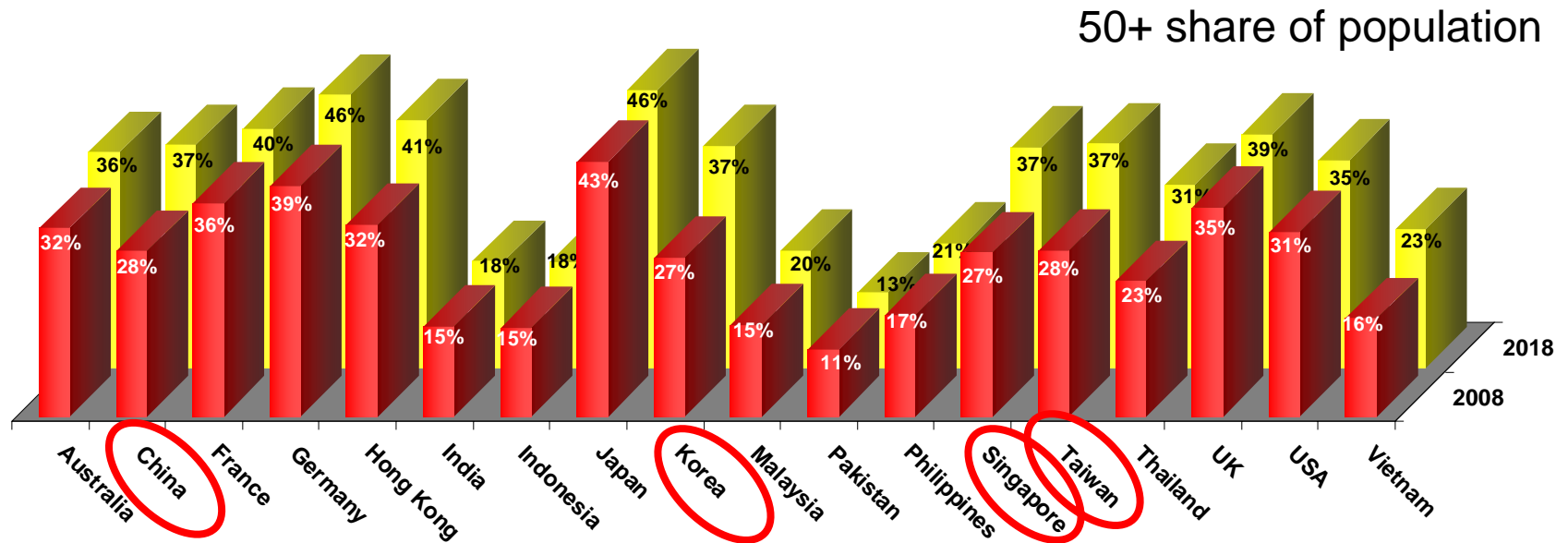
Stretching our view of the market

“Population ageing is
unprecedented,
a process without parallel
in the history of
humanity...”

United Nations, World Population
Ageing Report, 2007

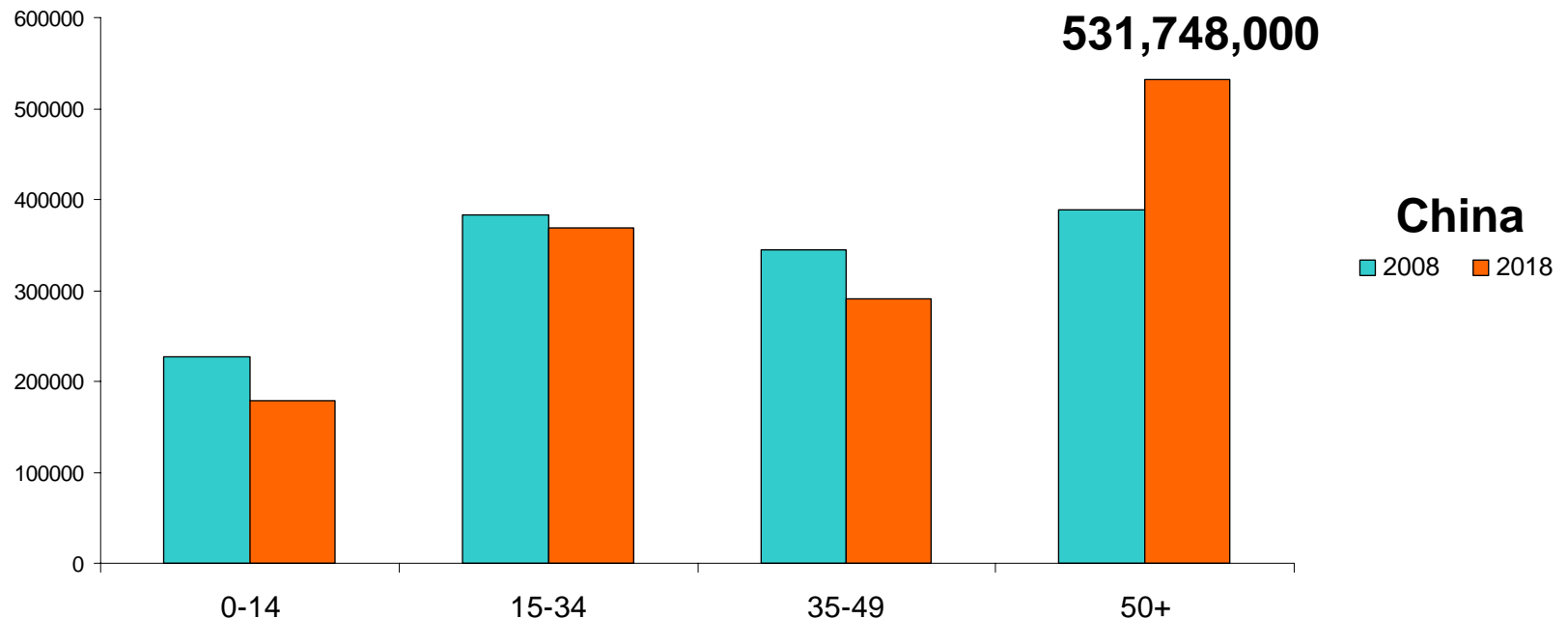
APAC 2008 ~ 18

- 50+ population will grow almost 5 times faster than the total population growth rate
- Most developed countries will have more than 35% population aged 50+



The 50 plus market provides huge opportunities for new business growth

- >50 is the ONLY growing segment in China
- 50+ group will add 143 million to reach over half a billion people by 2018
- <50 group will shrink by 117 million!



Chinese seniors have changed faster than our previous beliefs

- People aged 60+ in China have strong spending power with a combined annual income of up to Rmb 400 billion (US\$58 billion)
 - Per capita spending power of Chinese senior citizens is expected to rise from US\$1,620 in 2005 to US\$4,112 in 2015
- Among 60+s in Shanghai and Beijing, telecommunications ranks fourth after food, daily needs and payment for utilities in terms of expenditure
 - 85 per cent of respondents keep in touch with their friends through email
- Seniors also invest in taking care of their health and taking preventive measures. Seventy-six per cent do some form of regular exercise and 39 per cent take dietary supplements and/or vitamins

Supporting the SILVER group

孝

老 + 子



Life stages

This market is largely ignored. Their needs are not being met

More than 90%
of marketing
dollars are
invested to
attract younger
consumers

“They are the mainstream
wealthy segment in China,
having accumulated the
most wealth and now are
ready to enjoy life when
their child has achieved
independence”

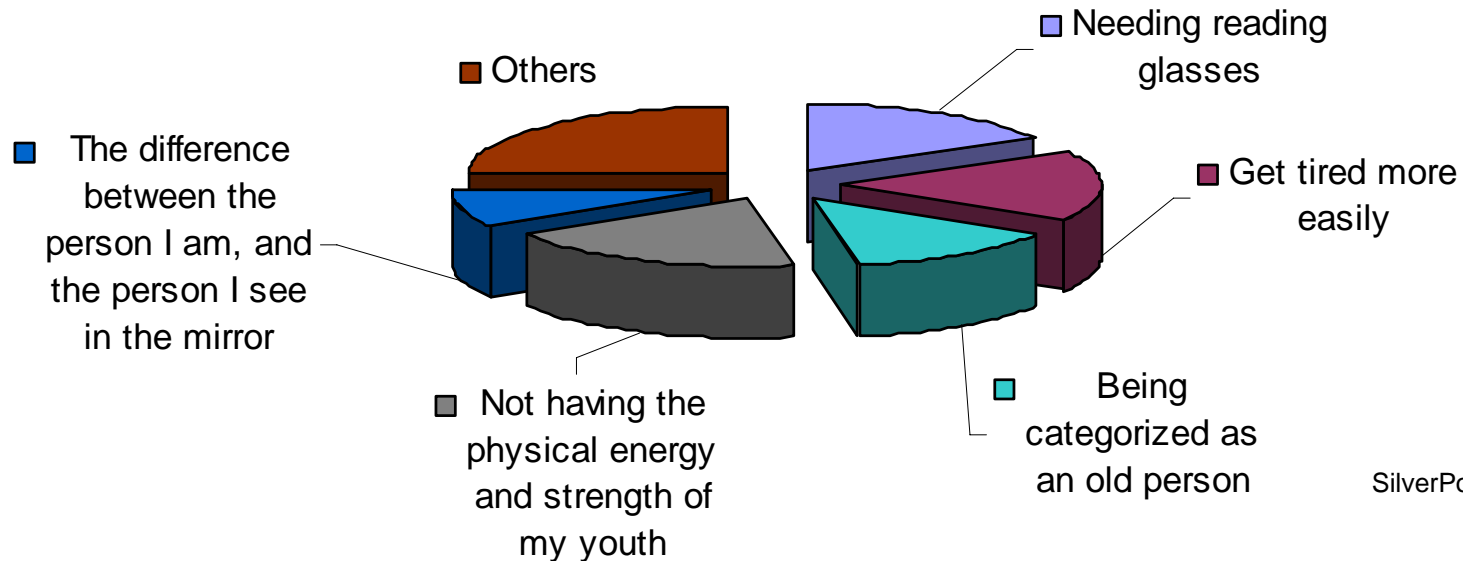


**Opportunity
awaits
companies that
understand their
needs & wants**

Stretch beyond...

The younger old

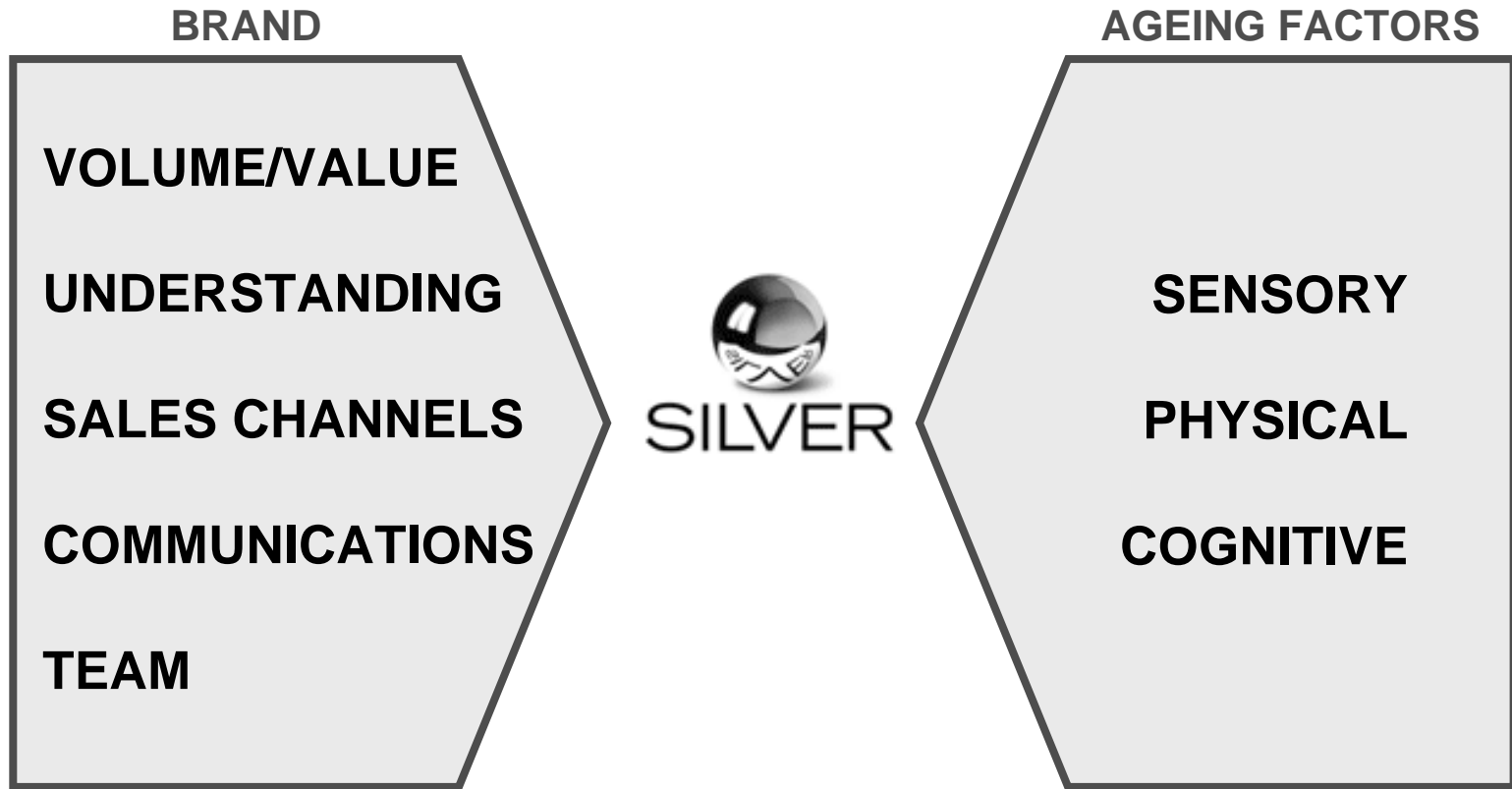
Most annoying things about ageing



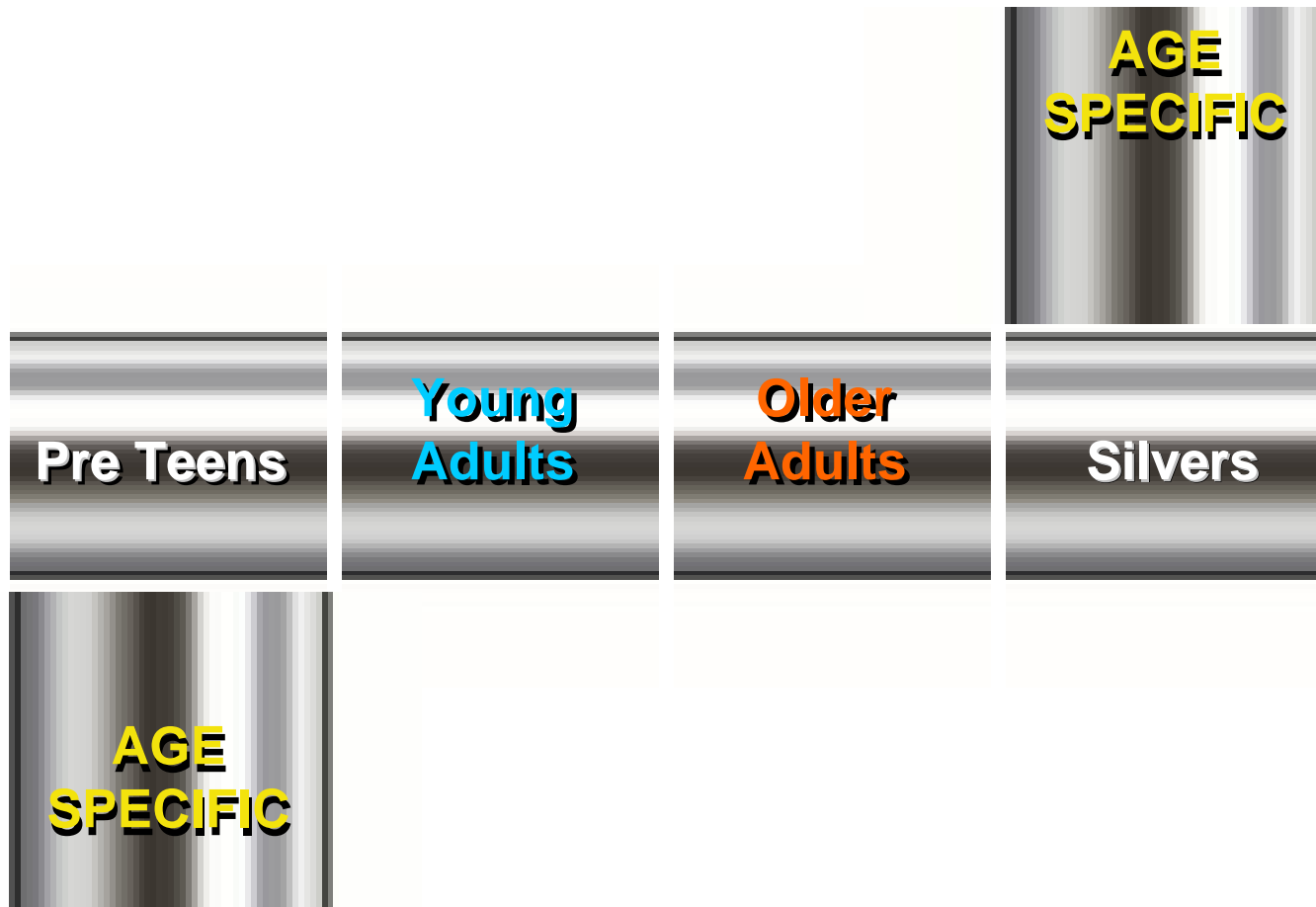
SilverPoll™ Jan 2009

What aspects of getting older most annoy you?

SilverAudit™



Products & services



Principles

1) **Universal Design**

Products and services are designed to accommodate the practical and emotional needs of young and old without an overt reference to either

2) **Ageless Marketing**

Sales strategies, retail placement and product labelling that make selection easier

3) **Inclusive Communications**

Ensure that older consumers are not alienated by messages that are unnecessarily skewed younger chosen media

Cases



Curves (USA)

Low impact, social exercise regime
for mature women



Nintendo Brain Training (Global)

Exercises for the brain

Cases



Yamaha Music Schools

Compensate for declining number of younger students by offering classes for the 50+



Calpis AMEAL S (Japan)

Functional drink that strengthen the immune system, relieve fatigue and reduce stress and blood pressure.

Launched in 1997. Now US\$2.4Bn in sales

Cases



Asics Walking (Japan)

A line of shoes and retail outlets focussed on older customers

Wii Fit (Global)

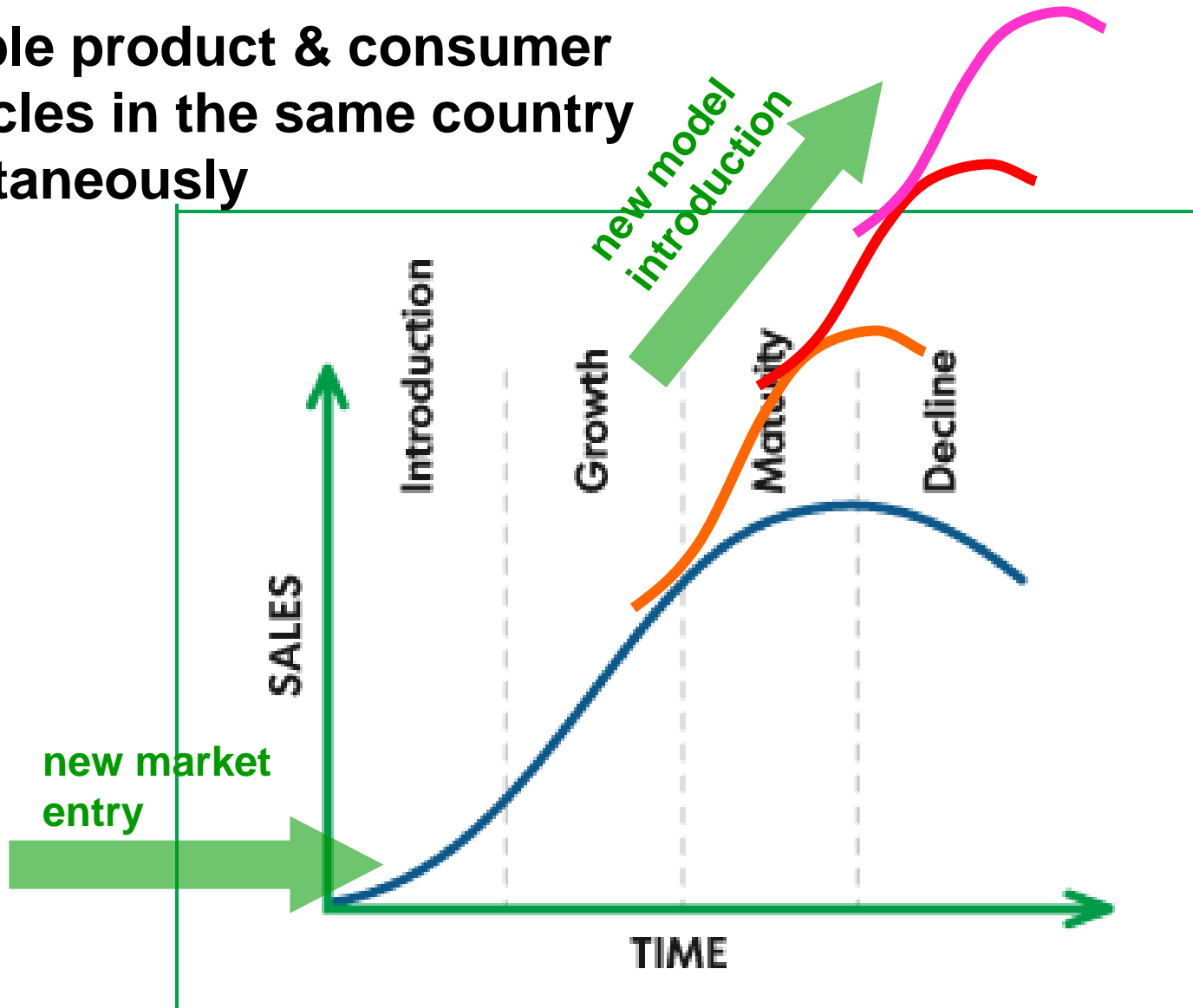
Hugely popular among seniors



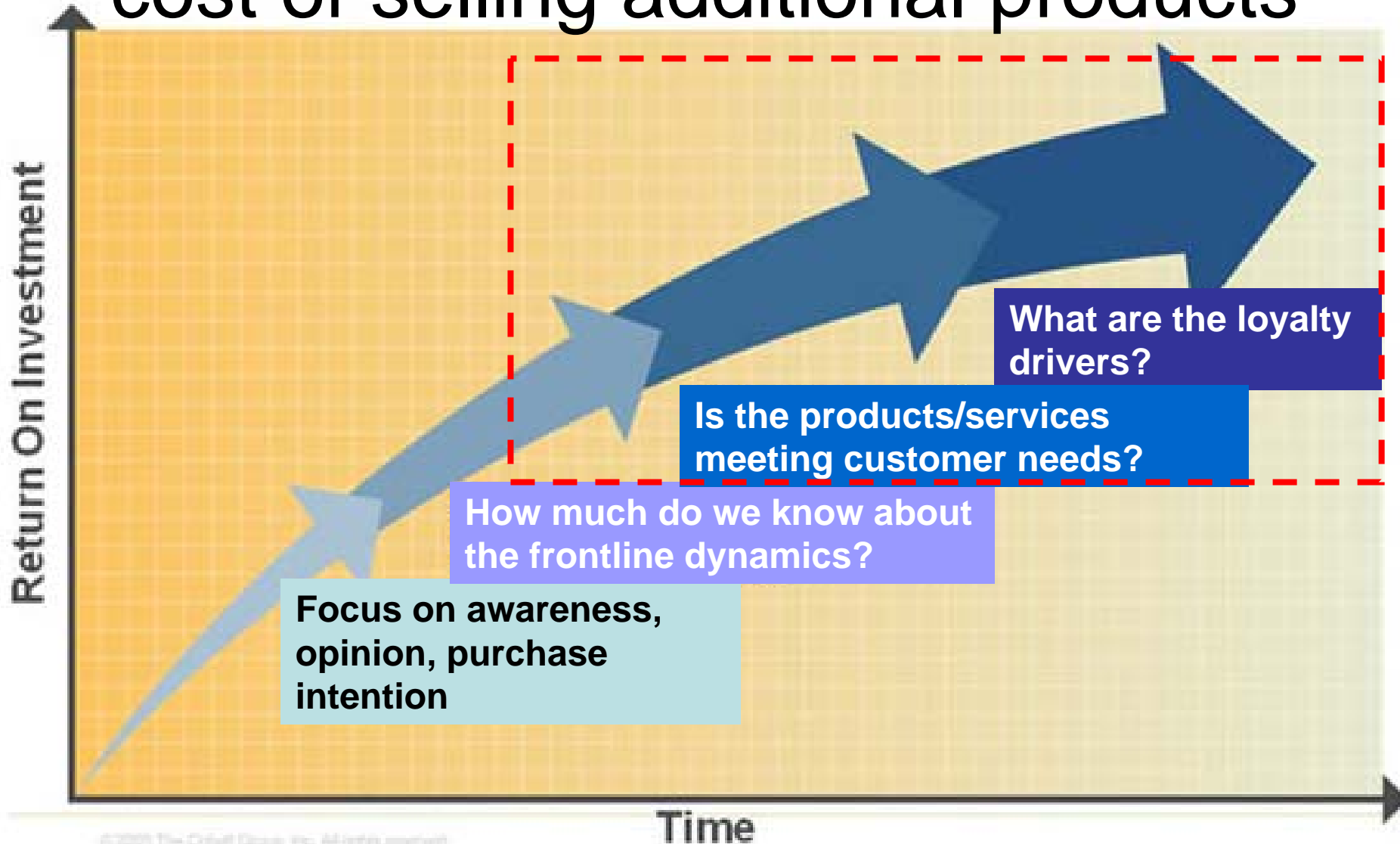
**What are the Asian secrets
to sustainable growth?**

Stretching the product/consumer lifecycles to keep the momentum going

Multiple product & consumer lifecycles in the same country simultaneously



Consumer lifecycle: reducing the cost of selling additional products



Yakult

“Have you taken your Yakult today?”

▪ 乳酸菌巨头 ▪ 我爱益力多 ▪ 快报专递 ▪ 科普基地 ▪ 益智中心 ▪ 联系我们



益力多
您今日饮过未?



会员: 密码: [登录](#) [会员注册](#)

- 益力多产品
- 我是益力多菌
- 益力多的诞生

Yakult Product 益力多产品

Turning point: from WHAT to WHEN in 1988

- 可爱的瓶子
- 有问必答
- 肠道测试
- 积分说明



点我

活性乳酸菌
乳饮品

风靡全球的益生菌保健法—益力多菌
(菌株为Lactobacillus casei strain Shirota)

ISO: 9001
ISO: 14001
GMP/HACCP

免疫调节·调节肠道菌群



Stretching beyond

View

of the market

Professionalism

and capabilities

Reinvention

Key impediments for long term, mutually beneficial relationship

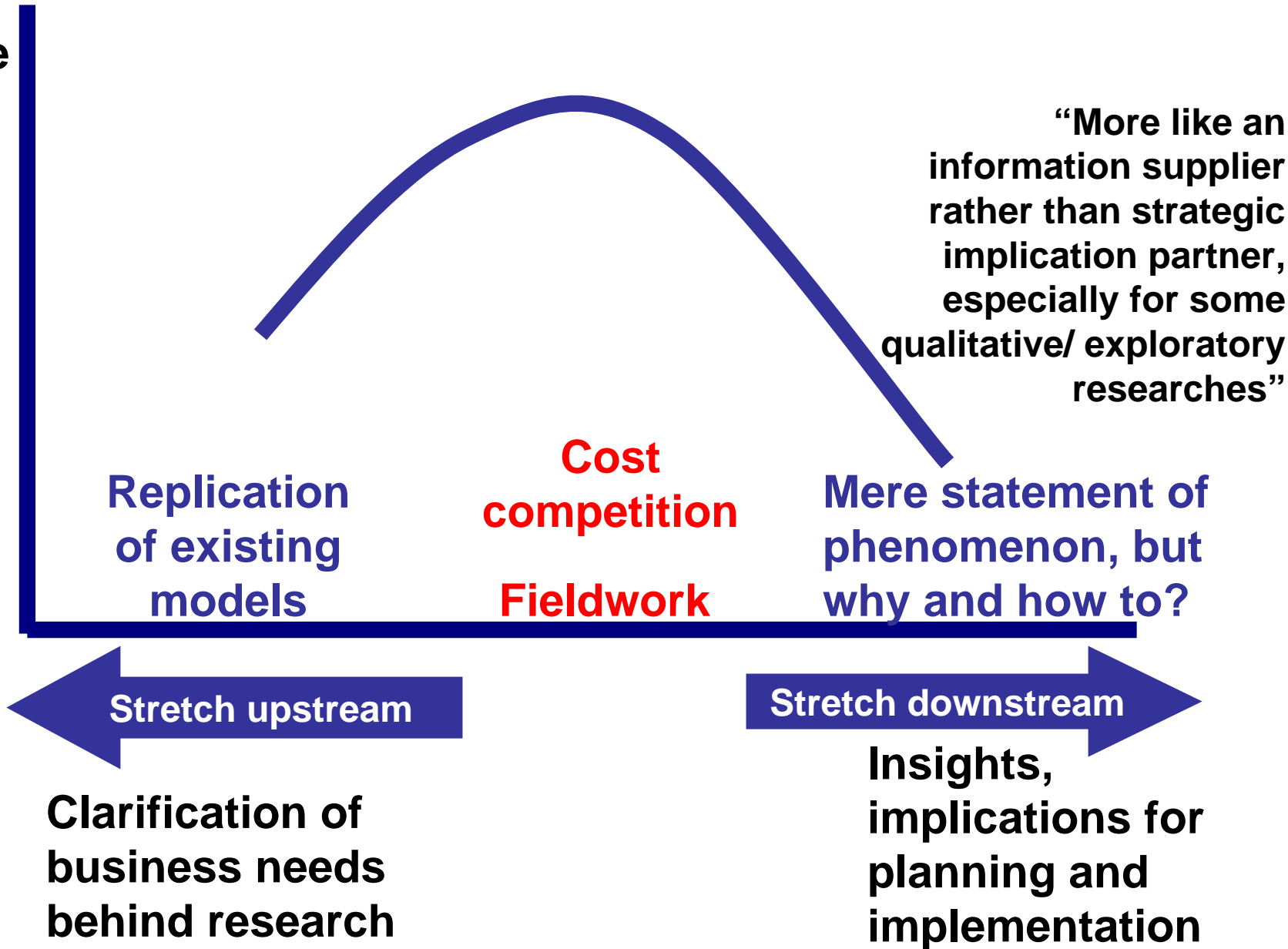


Clarity
Marketers

Initiative
Agencies

Current allocation of efforts

Service
scope



Reinventing ourselves with the smiling curve

Value
added
services

Tailor-made
approach to
address real
issues &
catch up with
the latest
market
dynamics

Accuracy &
precision

“Touch ground”:
reason-why analysis,
counter-strategy
suggestion with macro
to micro perspective

Clarification of
business needs
behind research

Fieldwork

Insight
articulation for
planning & action



Leading consumer desire for precious metal jewellery

PLATINUM

稀有铂金 永恒纯净

- 1997: Platinum Guild International entered China
- Successfully established platinum jewelry preference in a market with strong tradition for gold
- 2000: China became the top selling country of platinum jewelry
- 2008: China accounts for nearly 70% of global demand for platinum jewelry



PLATINUM
稀有铂金 永恒纯净



Comparison of organizational structure in developed and developing markets



Developed market



Developing market

Key challenges: talent development & retention

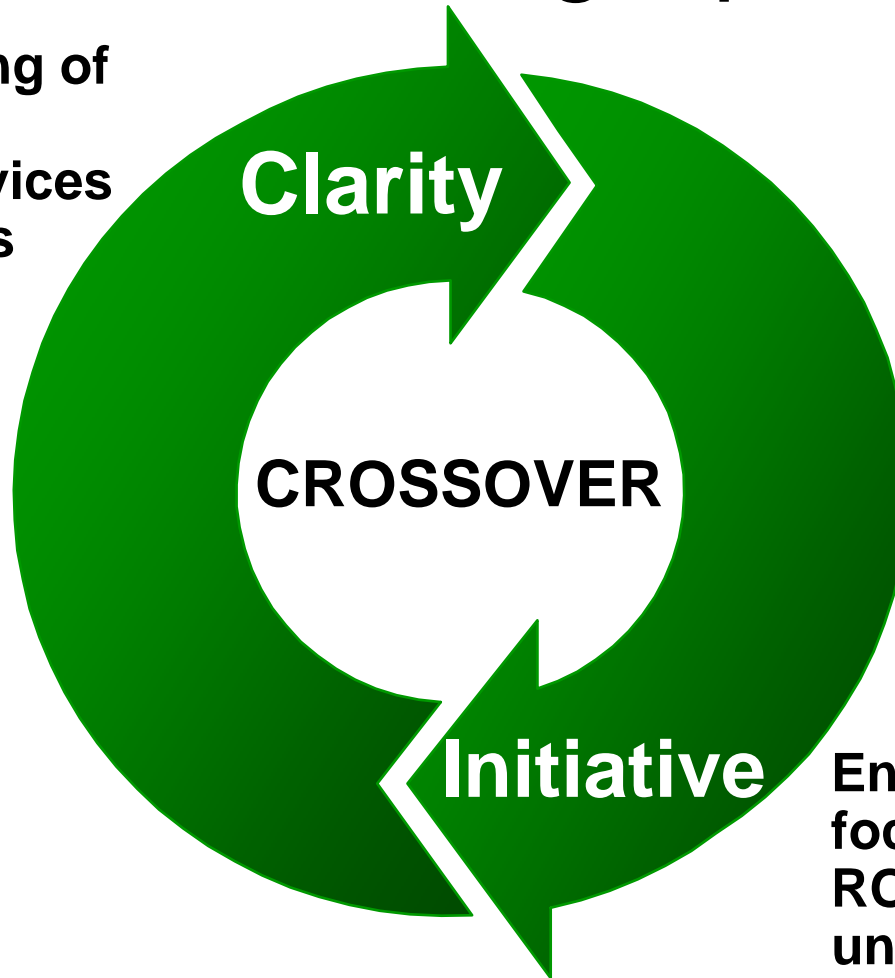
- Paradox: general knowledge vs special knowledge?
- Need critical mass to accumulate learning's in special industries, e.g. automobile, pharmaceuticals, luxury, service industry, etc.
 - Reduce learning curve
 - Career development opportunity for special talents
 - Talent retention
 - Ability to lead at upstream level

Research experience with marketing appreciation

- Research agency professionals with experience, marketing know-how, category knowledge
- CMK/CMI manager to consider integrating research agencies with marketing/brand team
- Involve research agencies in strategy planning, business meetings, even general meetings and meetings with ad agencies
- And involve ad agencies in research planning to make sure downstream questions are addressed at upstream planning stage

Willingness to invest in long-term strategic partnership

Better bridging of
marketing
research services
with business
planning &
strategy
development



Entrepreneurial spirit,
focus on long-term
ROI, spend time to
understand and hold
hands with client

Stretching beyond

View

of the market

Professionalism

and capabilities

Reinvention

Case sharing: back in 1997...

“好車款不來中國”

**“Good car models will not come
to China”**

“中國造不出好車”

“China cannot build good cars”

Buick GL8 station wagon TVC

“Space leads to possibility...”

“Buick GL8 Business Vehicle”

“From Shanghai GM”



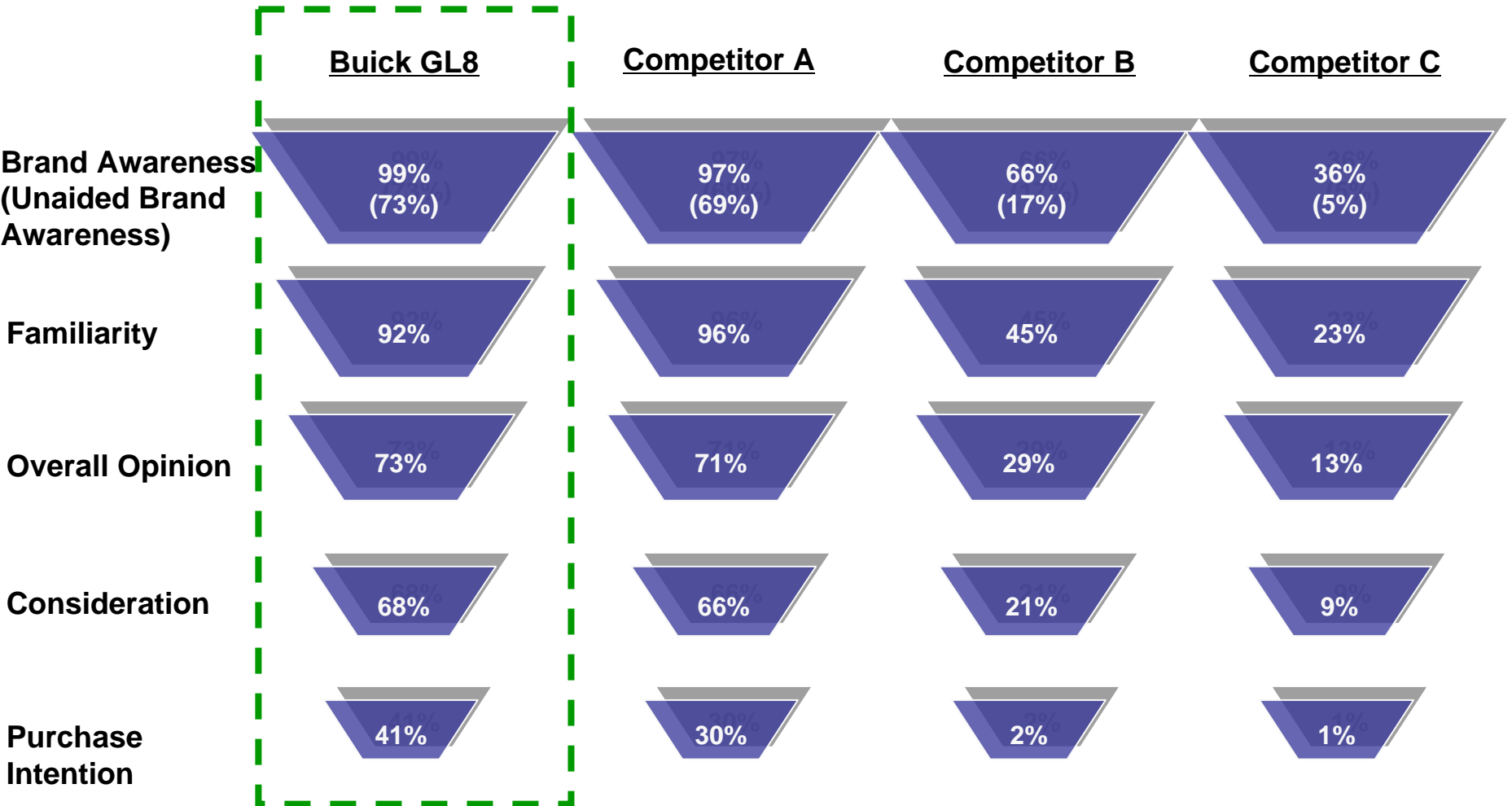
“Bigger Buick” ?
“3 box car” > “2 box car”

The revised proposition

Buick GL8 Business Class on the Road



Purchase Funnel Performance



Challenge the status quo

- “Planning cannot catch up with changes!”
 - Past successes cannot be a guarantee of future successes anymore
 - “Falls into pattern, not inspiring enough...”
 - “Need creative insights too”
- 5W questions to current strategies
 - Platinum: focus on what and why
 - Yakult: evolve from what to when
 - GL8: change what to who
 - How....Oreo? Kidabion MV syrup, a calcium booster to be mixed with milk
- Traditional IMC approach still working with the quick diversification of media habits?

New modeling & modular models

- “Too difficult to understand, not user-friendly”
- Some examples of new model needs
 - Build business models for new IMC planning
 - Young generation has totally different profile and lifestyle. Any business related to young generation need disruptive research methodology, such as fashion, luxury, travel, etc
- Adaptation of international tools to China
 - Is there a way to break up big scale models into modular format?
 - Lack of full set of market data for business insights
 - Test marketing
- Ways to achieve faster turnaround of results and analysis to catch up with the fast changes in the market
 - E.g. How to achieve better ROI from media and framework to help guide media budget deployment, esp. digital

Examples of needs for insight & how-to

Brand sustainability

- Brand architecture planning and product integration management
- Brand health monitoring and road-map strategy recommendation: actionable points at operation level
- Product lifecycle management
- Market dynamics and connection of brand and category to consumers
- IMC planning, prioritization and measurement of effectiveness
 - Corporate, brand, product level IMC?
- ...etc.

Examples of needs for insight & how-to

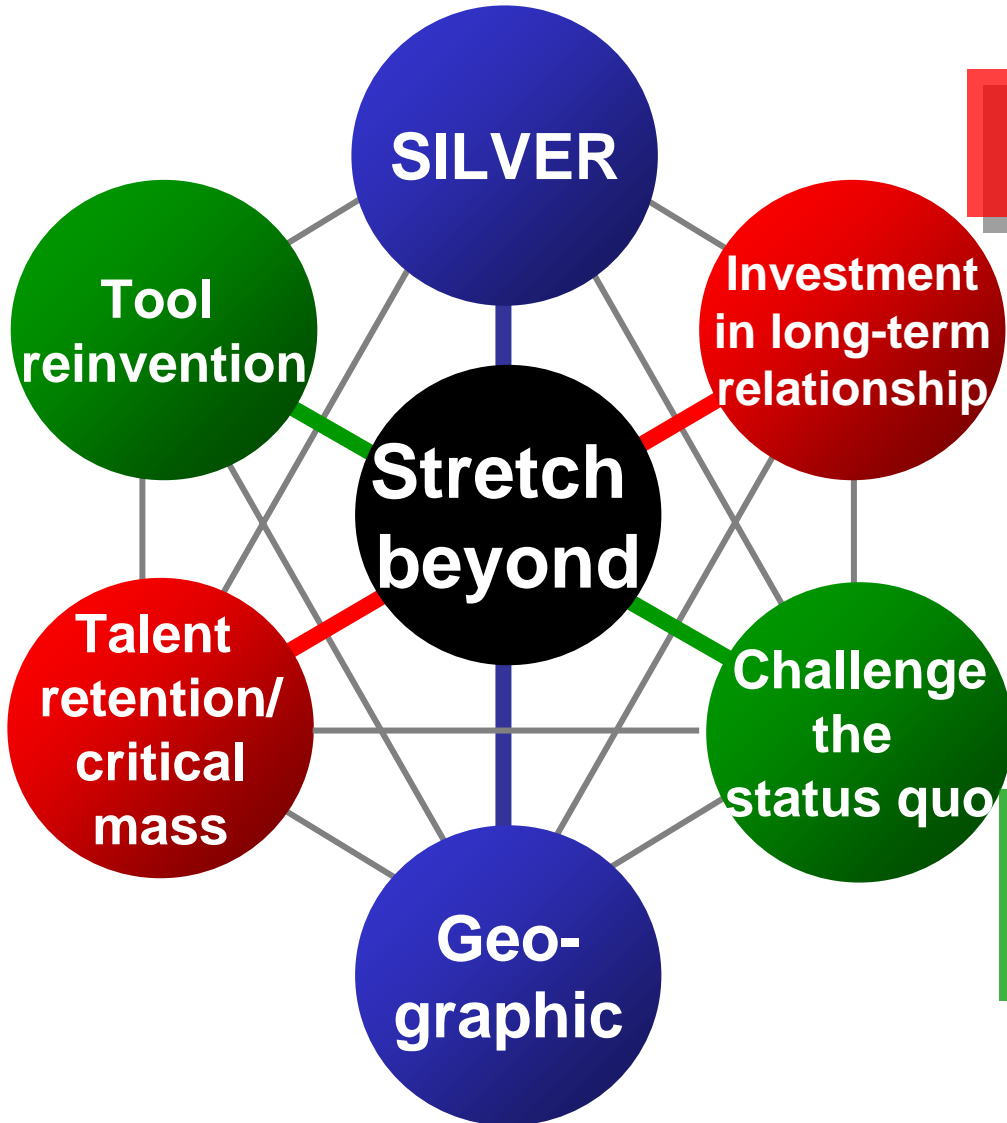
Consumer segmentation

- Trends, macro view of the changing consumer dynamics
 - e.g. impact of big events on the general outlook
 - Shopper behavior study: how shoppers shop for particular product in particular retail environment.
 - Triggers/barriers/needs/motivation/value
 - Perception towards brands, points of influence
- Customer lifecycle management
- Known needs, unmet needs, unknown needs
- Emerging consumer segments/markets/media
- What is “in”, what is “out”?
- New media behaviour and the influence of interactivity
- Cultural factors, projection to national situation,etc.

Consumer/product
lifecycle regeneration

To summarize...

Professional expertise to
address upstream needs



Lead instead of follow,
Innovative approach to
downstream needs

About Silver

Silver is Asia Pacific's most insightful and informed authority helping businesses to leverage the rapidly growing 50+ segment

What we do

INFORM

- SilverPoll
 - online survey
- Focus groups
- Silver3D
 - attitudes & behaviours

ADVISE

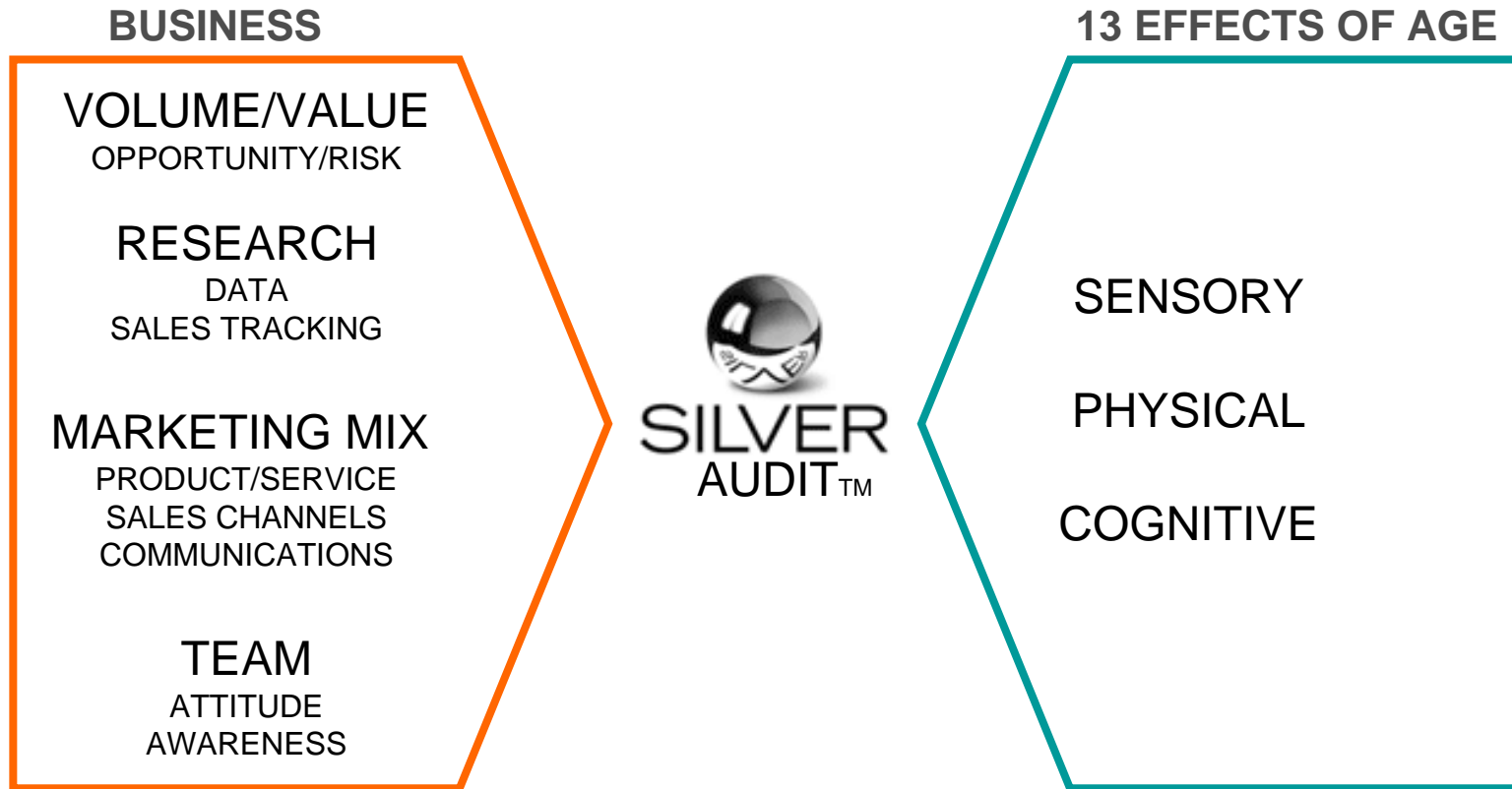
- SilverAudit
- Workshop session
- Executive briefing
- Training
- Corporate strategy
- Brand strategy

CONNECT

- Comms planning
- Channel planning



SilverAudit™



Management

Kim Walker – Founder & CEO

- 30 years experience including APAC President& CEO of M&C Saatchi, APAC COO Carat Media

Wendy Tso – Partner, China

- 20 years experience in marketing, marketing communications and management in USA, Singapore, PRC: HKSAR, Taiwan, Shanghai

Brian Harrison – Partner, South East Asia

- Brian is a 40 year veteran of Ogilvy and Y&R. Worked in London, Toronto, Stockholm, New York, and Denmark. Sweden, Ireland and Singapore (CEO of Y&R SEA)

P.V. Narayanamoorthy - Head of Insights

- Over 30 years experience, he was formerly Strategic Resources Director and board member of Carat APAC

David Lewnes – Partner, Healthcare & Wellness

- 27 years in the healthcare business, the past 21 years of which have been in Asia including Regional President for the Publicis Healthcare Communications Group

Chris Beaumont – Partner, Japan

- 30 years experience across Asia Pacific both as a strategic planner and company CEO

Advisory Board

Christophe Bezu

- CEO, Adidas Asia Pacific

Brent Green

- One of USA's leading experts on 50 plus marketing

Dr. Yuwa Hedrick-Wong

- Chief Economic Advisor, MasterCard Worldwide. Adjunct Professor, School of Management, Fudan University, Shanghai.

Dr. Yasuhiko Kobayashi

- Professor of Integrated Communication, Aoyama Gakuin University, Tokyo. President of Japan Academy of Advertising and Director of Nikkei Advertising Research Institute.

Dr. Clint Laurent

- Founder, Global Demographics

Prof. David R. Phillips

- Chair Professor of Social Policy; Chair, Advisory Board and Founder Director, Asia-Pacific Institute of Ageing Studies, Lingnan University, Hong Kong

Dick Stroud

- UK's leading expert on 50 plus marketing

“For age is opportunity no less than youth
itself, though in another dress....”

Henry Wadsworth Longfellow



SILVER

Connecting you to the 50+ market

Silver Group

Kim Walker, CEO

kim@silvergroup.asia

Silver Group China

Wendy Tso, Partner

wendy.tso@silvergroup.asia

Website: www.silvergroup.asia

Blog: <http://silvergroup.asia/blog/>