Keynote Fireside Chat

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Demystifying China's Love Affair with O2O connected shopping

Nishtha Mehta

David Porter


可爱多
翻盖扫码
100%中奖赢流量
双倍
顶料


手机淘宝扫一扫
100%赢5兆流量
参与方式：
1.打开手机淘宝客户端
2.点击左上方扫一扫按钮
3.扫描顶盖上的二维码
4.领取5兆流量奖品（流量的具体获取和使用方式需根据电信运营商的要求）
活动时间
2015年5月1日至2015年9月30日
（6月1日除外）


可爱多

Own stores

watsons

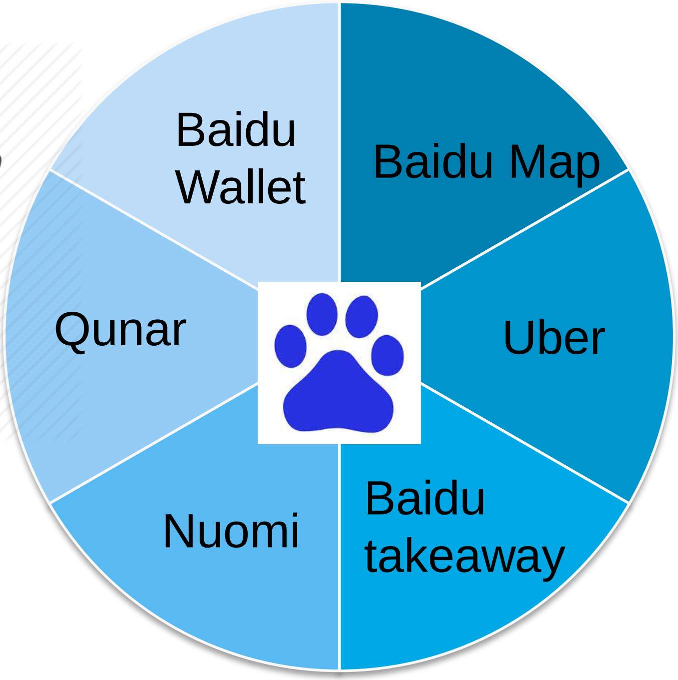
Carrefour
家乐福

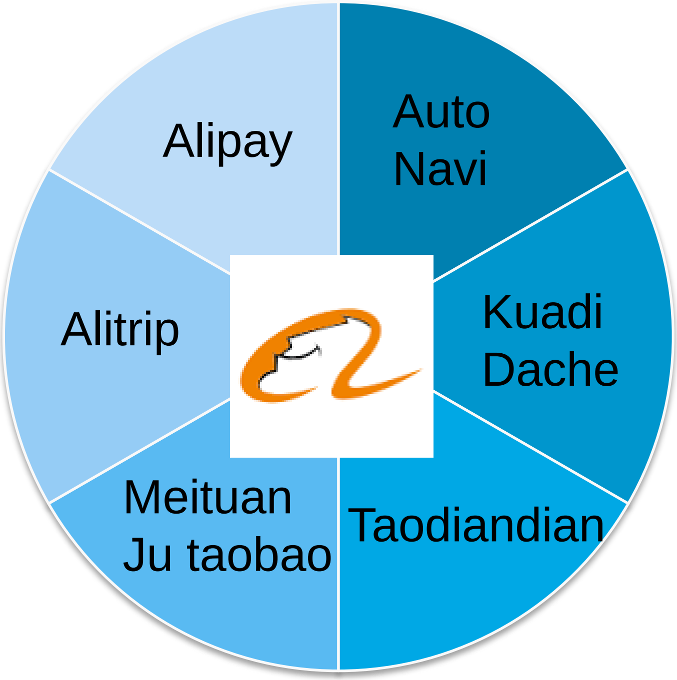
华润万家
vanguard

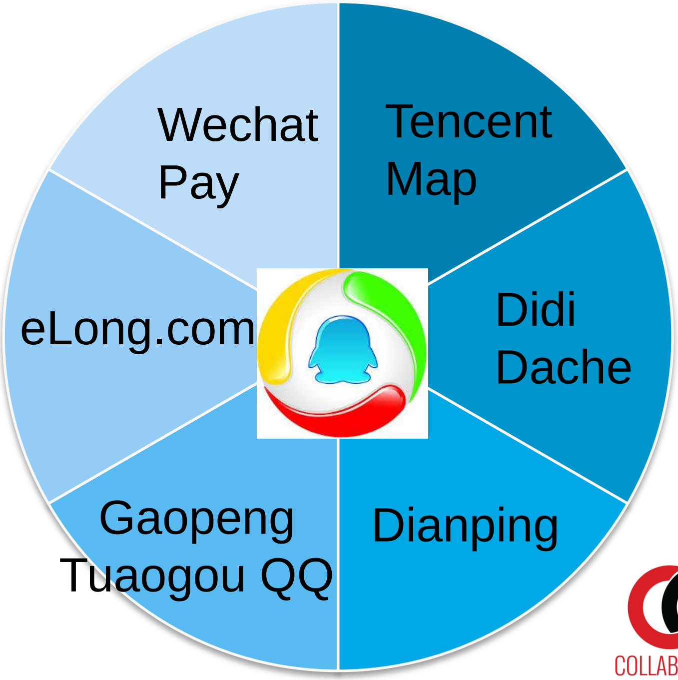
物美
WU MART

TESCO

Suning 苏宁







COLLABCENTRAL

Offline – Instore O2O opportunity

Own stores

90%

10%

Online – e/mCommerce O2O opportunity

Demystifying China's love affair with O2O connected shopping

COLLABCENTRAL Identifying the priorities Collaboration with

WORLD FEDERATION OF ADVERTISERS

20 key China mobile marketers/ organisations surveyed
End July/Early August 2015

YouGov What the world thinks

1000 active O2O Chinese shoppers surveyed
Those using Moblie to shop offline or shop for offline services
Early August 2015

WHAT

6 TOP
CATEGORIES

CHINESE SHOPPERS
USE MOBILE TO SHOP FOR OFFLINE

HOW

5 TOP
O2O ACCESS TECH

USED FOR OFFLINE SERVICE/
INSTORE

WHERE

4 KEY
MOBILE PLATFORM
OR TECHNIQUES

ENABLING ADOPTION OF O2O

WITH

3 TOP
BARRIER AND DRIVER

FOR MARKETERS TO
ACCELERATE O2O

WHEN

2 KEY
FUTURE PROOFING

AREAS FOR MARKETERS,
RETAILERS, BATs TO JOINTLY
DELIVER END TO END O2O

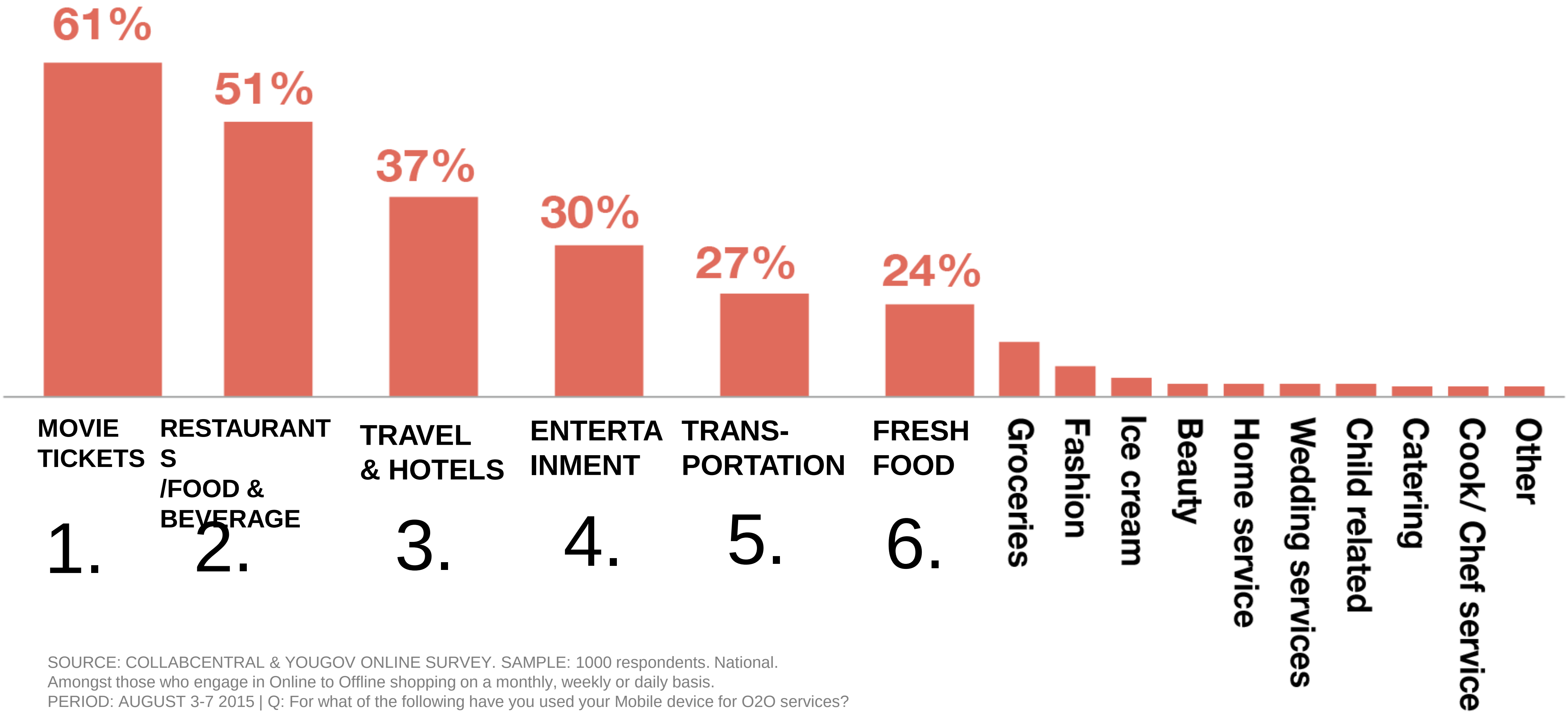
WHO

1 TOP
HELP SEEKED

FROM THE MOBILE
MARKETING FORUM & INDUSTRY

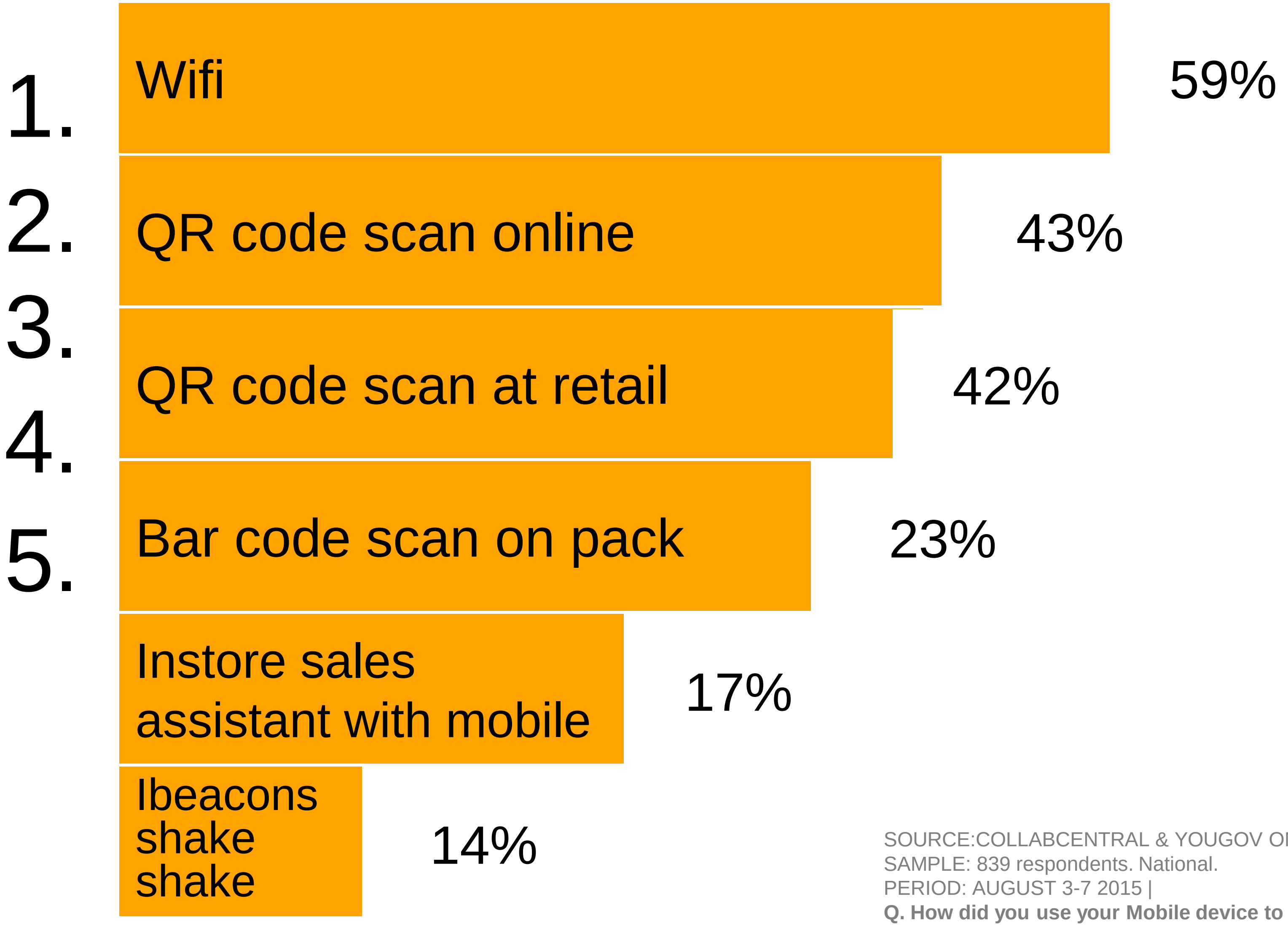
SOURCE:COLLABCENTRAL CONSULTING INC. IN COLLABORATION WITH WFA AND YOUGOV SURVEY. AGUST 2015. WFA – MARKETERS SIDE OF THE SURVEY. YOUGOV – CONSUMER'S SIDE OF THE SURVEY

6 TOP CATEGORIES CHINESE SHOPPERS LOVE TO USE MOBILE TO BUY – ONLINE TO OFFLINE



SOURCE: COLLABCENTRAL & YOUGOV ONLINE SURVEY. SAMPLE: 1000 respondents. National.
Amongst those who engage in Online to Offline shopping on a monthly, weekly or daily basis.
PERIOD: AUGUST 3-7 2015 | Q: For what of the following have you used your Mobile device for O2O services?

5 TOP O2O ACCESS TECHNOLOGY USED OFFLINE/INSTORE



SOURCE:COLLABCENTRAL & YOUGOV ONLINE O2O SURVEY.
SAMPLE: 839 respondents. National.
PERIOD: AUGUST 3-7 2015 |
Q. How did you use your Mobile device to access the O2O service?

4 KEY MOBILE PLATFORMS ENABLING O2O IN-STORE

CONSUMER VIEW

1.	Mobile payment apps for special promotion offer. Eg –Alipay/ WeChat	62%
2.	Mobile payment apps to make payment Eg –Alipay/ WeChat	46%
3.	WeChat moments share	35%
4.	Mobile coupons	28%
	Mobile commerce app	27%
	Gift or loyalty points rewards redemption	24%
	Weibo shares	18%

SOURCE: COLLABCENTRAL & YOUGOV ONLINE. O2O SURVEY 2015
BASE: 100 ACTIVE O2O SHOPPERS (MOBILE FOR OFFLINE SHOPPING) AUGUST 2015
Q. **Which of following platform have you used before to access O2O service?**

MARKETERS VIEW

1.	Gift or loyalty rewards redemption	30%
2.	In-store sales assistant with their Mobile/ Tablet	24%
3.	Additional content access via QR codes	22%
4.	Mobile coupons	21%
	Mobile payment apps	14%
	Video walls	10%
	Location based search	10%

SOURCE: WFA & COLLABCENTRAL MOBILE MARKETING CHINA - O2O SURVEY 2015
BASE: 20 BRAND ORGANIZATIONS. AUGUST 2015
Q. If you've used mobile to drive O2O, please indicate which specific techniques you used (most effective ones)

3 TOP DRIVERS & BARRIERS

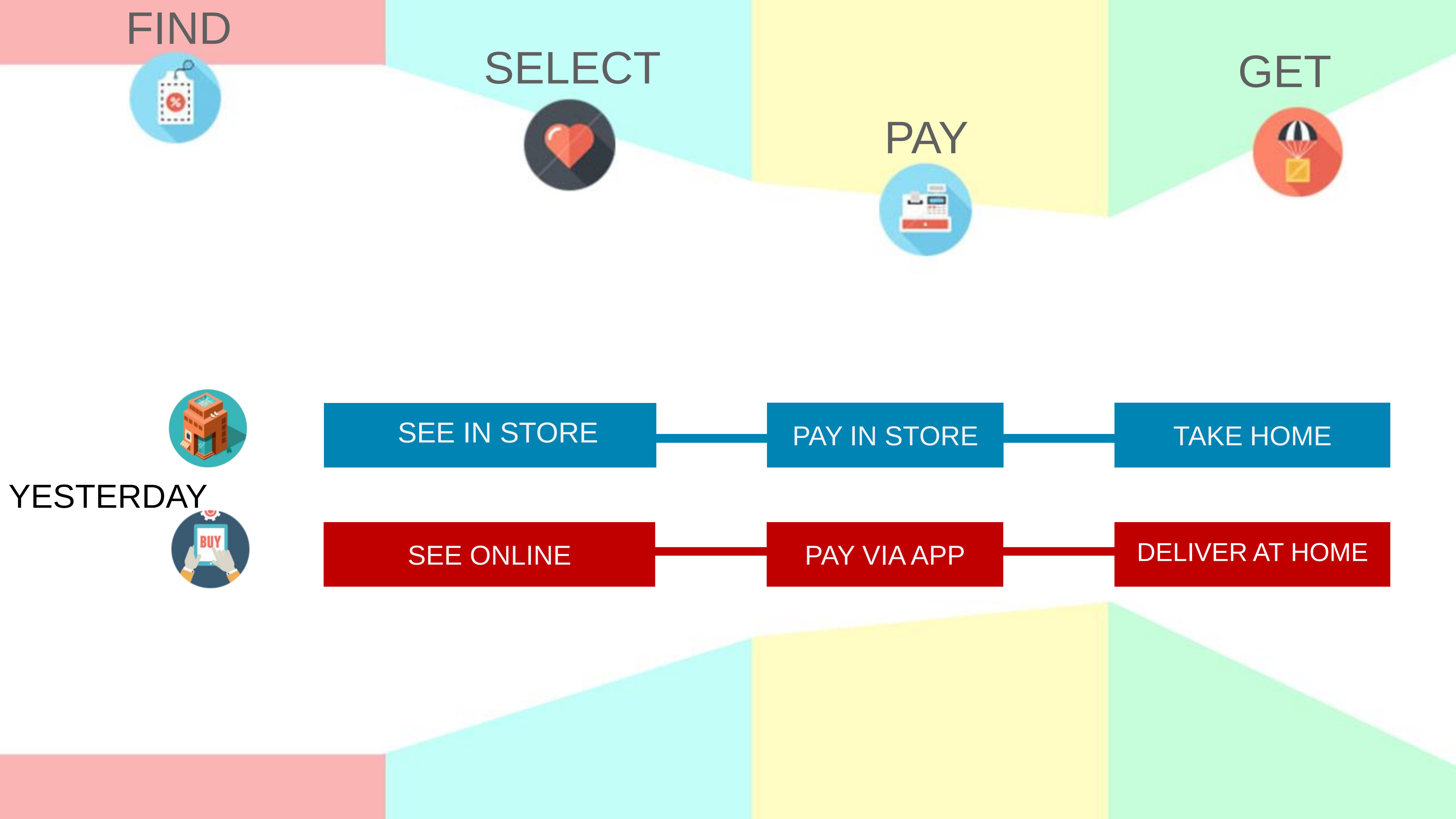
Q: What have been the biggest drivers in your move towards integrating mobile with offline (retail store)? (even if it was a test pilot)

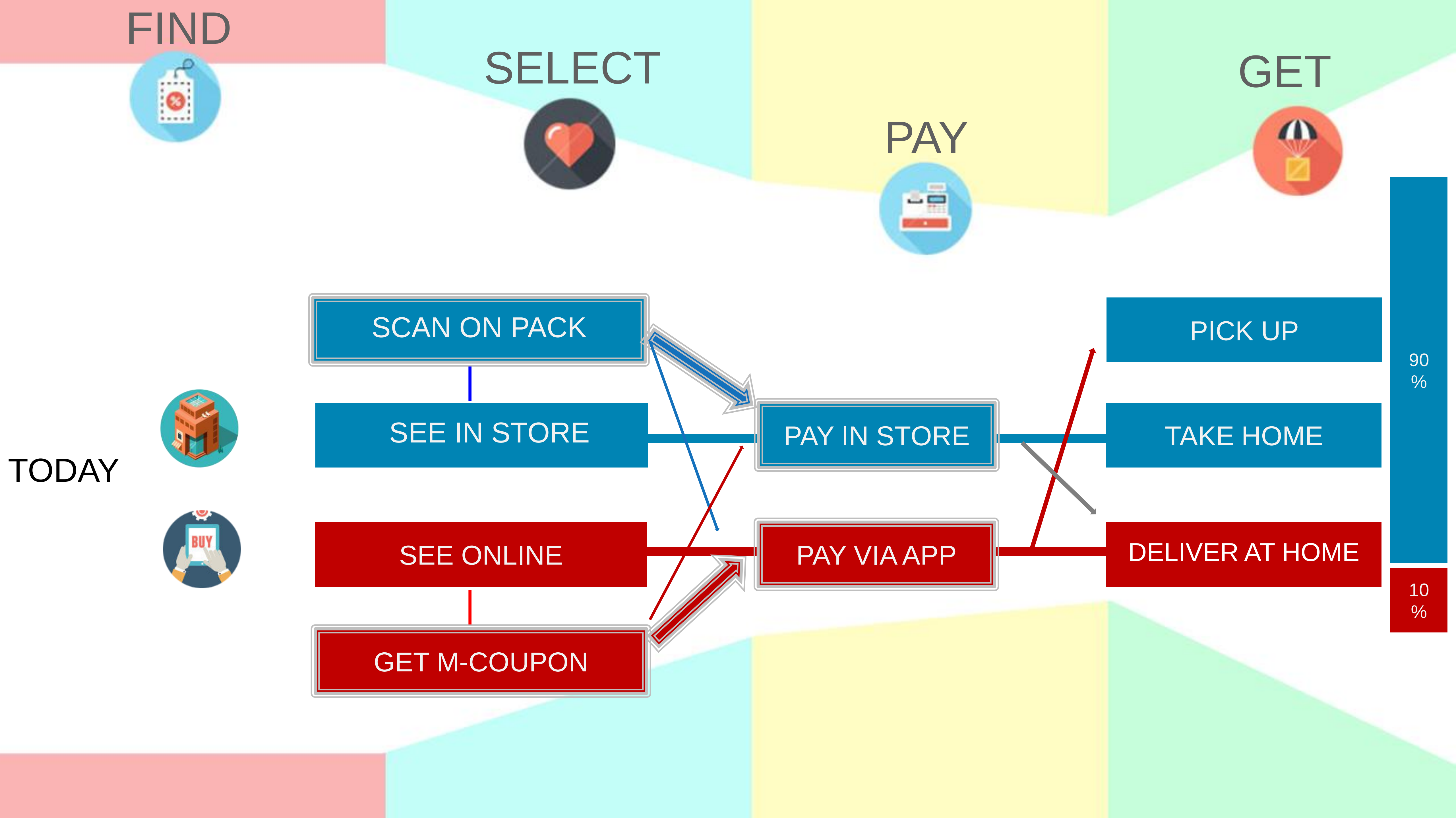
1.	Marketing, media & sales working In partnership (breaking of silos)	74%
2.	WeChat/ Alipay integration with POS/ retail	61%
3.	Ease of Wechat coupon delivery & redemption at store	52%
	e/m commerce offering online to offline Solutions (eg – order online & collect offline)	35%
	Making product packaging scannable/ interactive	13%

Q: What have been the biggest barriers/challenges in your move towards integrating mobile with offline (retail store)?

1.	Readiness of retail infrastructure to Integrate Mobile payment/ coupon redemption	68%
2.	Unaware of best practice models	36%
3.	Measuring effectiveness	36%
	Silo working internally	32%
	Lack of knowledge & training	28%
	Silo working by our agency partners	24%
	Making product pack scannable/ Interactive	20%

SOURCE: WFA & COLLABCENTRAL MOBILE MARKETING CHINA - O2O SURVEY
BASE: 20 BRAND ORGANIZATIONS. AUGUST 2015


FIND
SELECT
PAY
GET
SEE IN STORE
PAY IN STORE
TAKE HOME
YESTERDAY
BUY
SEE ONLINE
PAY VIA APP
DELIVER AT HOME


FIND
SELECT
PAY
GET
TODAY
SCAN ON PACK
SEE IN STORE
SEE ONLINE
GET M-COUPON
PAY IN STORE
PAY VIA APP
PICK UP
TAKE HOME
DELIVER AT HOME
90 %
10 %
BUY

2 KEY AREAS FOR MARKETERS TO FUTURE-PROOF

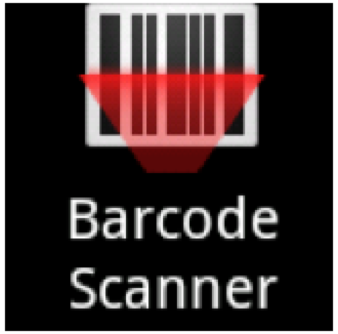
1. SCAN ON PACK – Bar code scanning

2 KEY AREAS FOR MARKETERS TO FUTURE-PROOF

2. GET M-COUPON – Mcoupon redemptions instore

A.

Pack Bar Code scan



MCOUPON IN H5 PAGE –
SAVE IN PASSBOOK –
MCOUPON PAYMENT CODE –
CASHIER/SCANNER

B.

QR Code/e-wallet

MCOUPON IN H5 PAGE –
SAVE IN PASSBOOK –
MCOUPON PAYMENT CODE –
CASHIER INPUTS CODE OR SCANS
OR CLICK ON A BUTTON ON H5

C.

Location based/Wifi

MCOUPON VIA LBS BANNER AD
OR ALIMAMA RETARGETING
CLICK-COLLECT-REDEEM

D.

Group buy Apps
Eg – meituan, nuomi

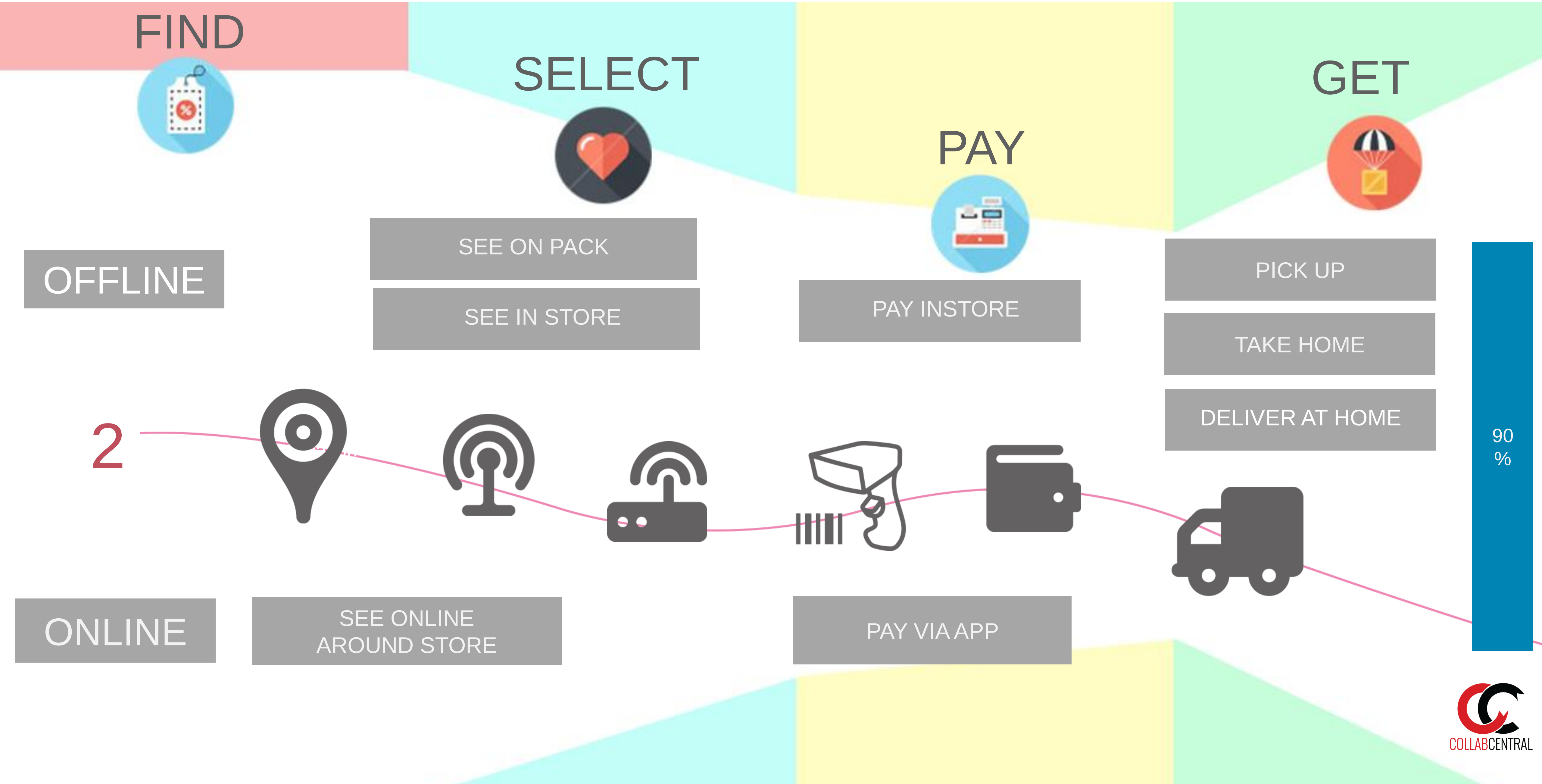
BROWSE, CHOOSE PROMO, COLLECT
COUOPON, RECEIVE NO. OR QR CODE
FOR THE COUPON, SHOW AT RETAIL OR
RESTRURANT, CASHIER INPUTS THE
NUMBER OR SCANS QR CODE

E.

SMS

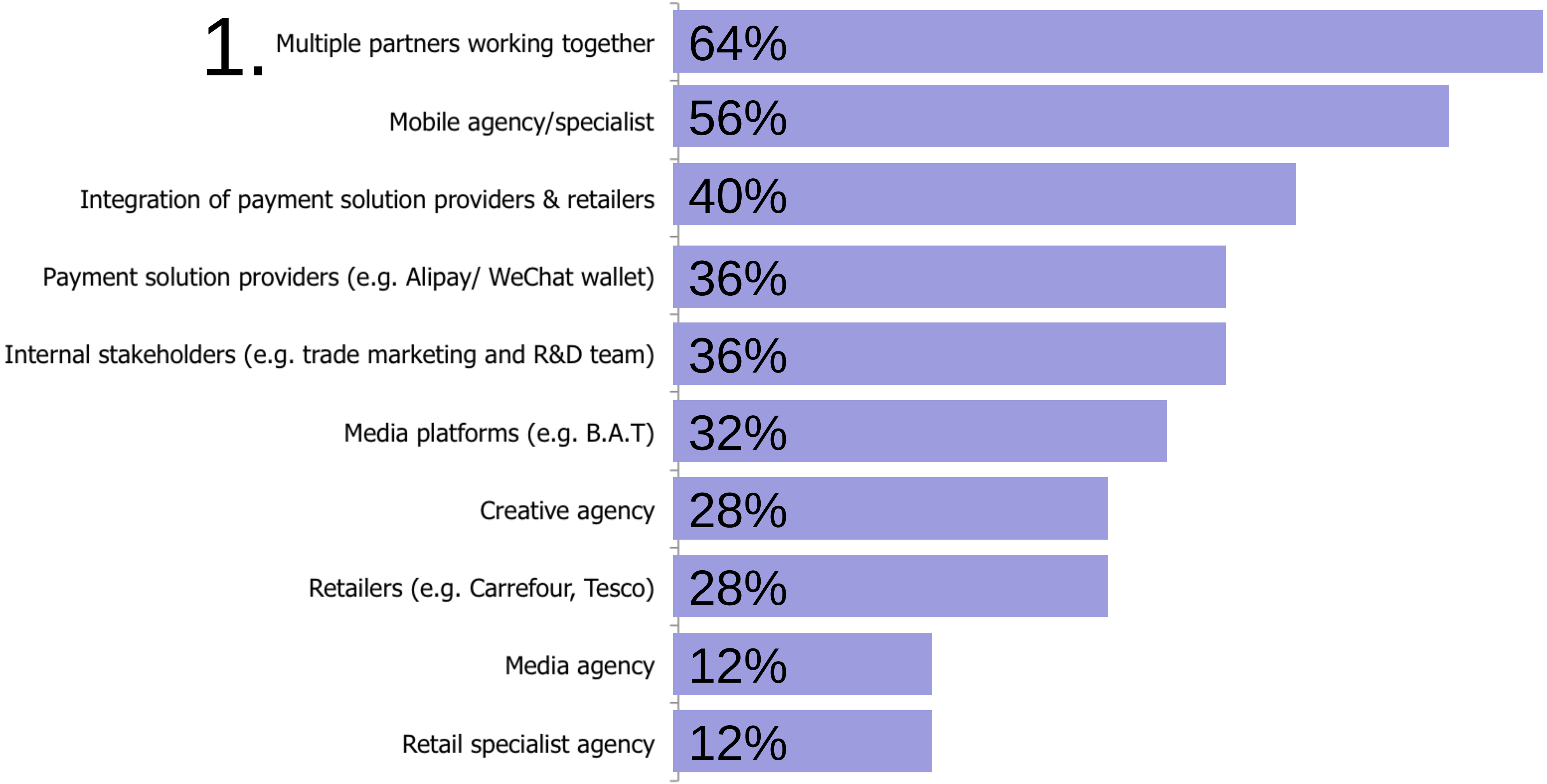
OPT-IN FOR MCOUPON
RECEIVE COUPON NUMBER
CASHIER ENTERS THE
NUMBER
OR ENTER NUMBER ON APP

WORKING TOWARDS SIMPLIFIED O2O @ STORE ECOSYSTEM

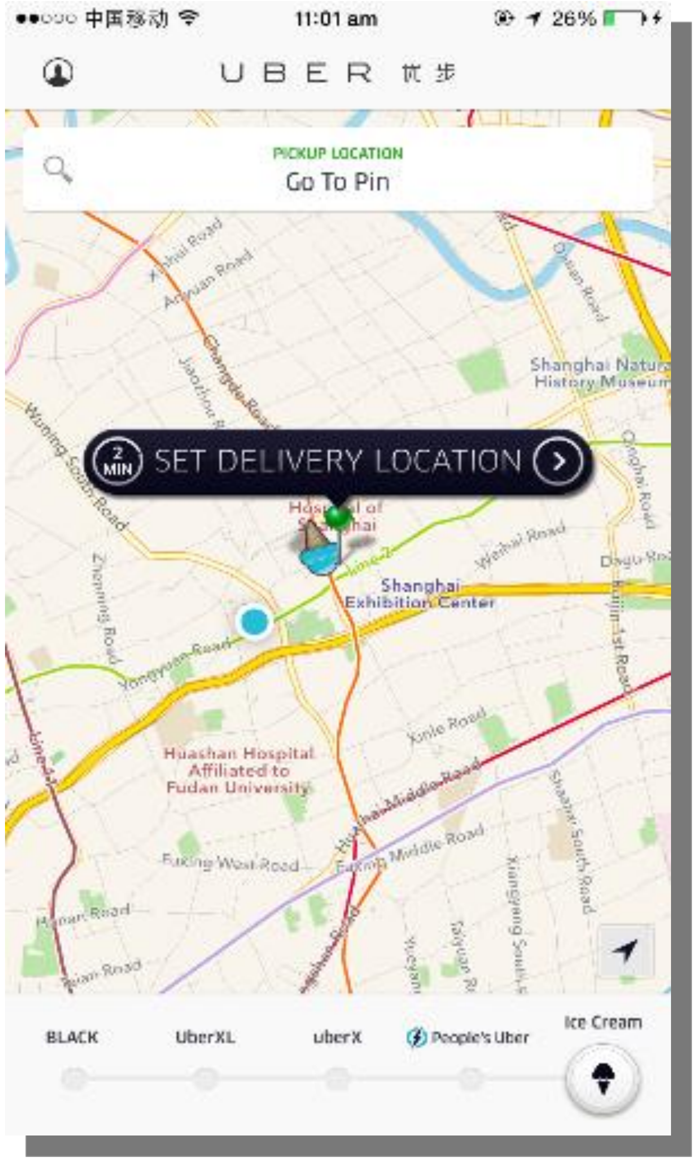


1 ASK FROM THE COMMUNITY HERE –

ORGANISATIONS NEED SHAPE SHIFT & AGILITY



SOURCE: WFA & COLLABCENTRAL MOBILE MARKETING CHINA - O2O SURVEY
Q. Who is best placed to help you in moving fast towards mobile's integration with offline (retail store)?


中国移动
11:01 am
26%
U B E R 优步
PICKUP LOCATION
Go To Pin
2 MIN
SET DELIVERY LOCATION
Shanghai Natural History Museum
Shanghai Exhibition Center
Huashan Hospital Affiliated to Fudan University
BLACK
UberXL
uberX
People's Uber
Ice Cream


Ice Cream


发现
朋友圈
EMiLY
连续被拒绝两次以后~终于等到M~
happy nice Friday~
3小时前
删除

Unilever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FORUM SHANGHAI
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MMA
CHINA 中国无线营销联盟