



Matthew Brennan

Managing Director
China Channel

SMART RETAIL / NEW RETAIL IN CHINA

MATTHEW BRENNAN

ONLINE & OFFLINE MERGE TOGETHER

NACS

**Convenience
Summit** Europe





SMART RETAIL / NEW RETAIL IN CHINA
ONLINE & OFFLINE MERGE TOGETHER
MATTHEW BRENNAN


CHina CHat
SHANGHAI - SEPT 2018



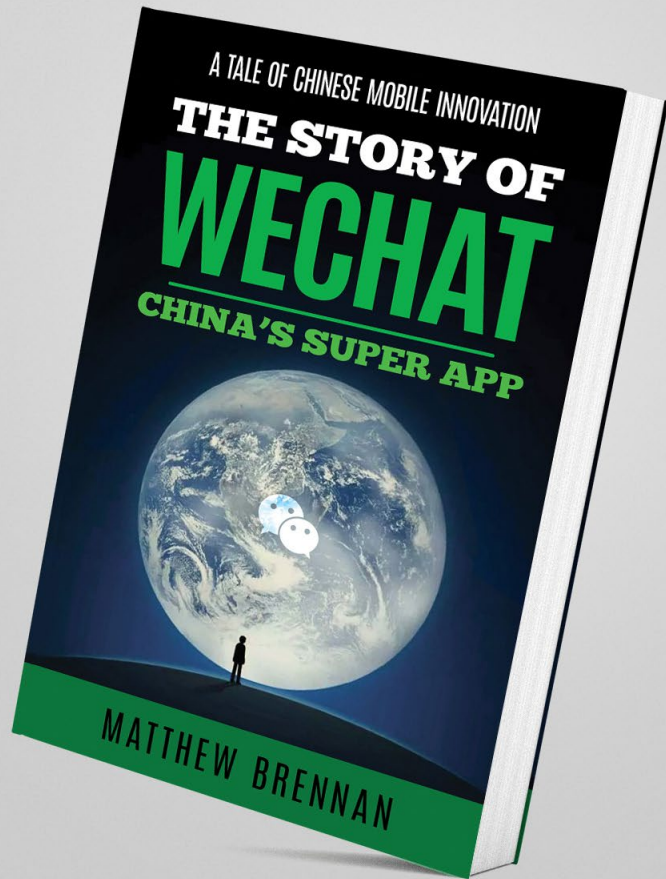
入口流量-线上 Traffic entry points - Online

System 系统入口




CHina CHat
SHANGHAI - SEPT 2018

PRESENTATION FROM WECHAT TEAM'S MINI PROGRAM ECOMMERCE DIVISION



「CHINA TECH TALK」

technode × China Channel

THE REPUBLIC OF



The World's Best SAMSUNG MEDICAL CENTER

<http://ihs.samsunghospital.com>





THE PEOPLE'S REPUBLIC OF







Tencent 腾讯

&



Alibaba Group
阿里巴巴集团


































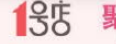










TENCENT & ALIBABA: SOME KEY AREAS OF COMPETITION

AREA	TENCENT		ALIBABA	
PAYMENTS		WECHAT PAY (PAY.WEIXIN.QQ.COM)		ALIPAY (ALIPAY.COM)
ECOMMERCE		JD, VIPSHOP (JD.COM, VIP.COM)		TAOBAO, TMALL (TAOBAO.COM TMALL.COM)
SOCIAL		WECHAT, QQ (WEIXIN.QQ.COM, IM.QQ.COM)		WEIBO (WEIBO.COM)
BROWSERS		QQ BROWSER (BROWSER.QQ.COM)		UC BROWSER (UCWEB.COM)
VIDEO		TENCENT VIDEO (V.QQ.COM)		YOUKU, TUDOU (YOUKU.COM, TUDOU.COM)
RETAIL		YONGHUI, CARREFOUR (YONGHUI.COM.CN, CARREFOUR.CN)		SUNING, HEMA (SUNING.COM, FRESHHEMA.COM)
CLOUD		TENCENT CLOUD (CLOUD.TENCENT.COM)		ALI CLOUD (ALIYUN.COM)
TRAVEL		LY (LY.COM)		FLIGGY (ALITRIP.COM)
BIKE SHARING		MOBIKE (MOBIKE.COM/CN)		OFO (OFO.SO)
ENTERPRISE PRODUCTIVITY		WECHAT ENTERPRISE, TIM (OFFICE.QQ.COM)		DING TALK (DINGTALK.COM)
MAPS		TENCENT MAPS (MAP.QQ.COM)		AUTONAVI (DITU.AMAP.COM)
BANKING		WEBANK (WEBANK.COM)		MY BANK (MYBANK.CN)
O2O ON-DEMAND		MEITUAN DIANPING (MEITUAN.COM, DIANPING.COM)		KOUBEI / ELE.ME (KOUBEI.COM, ELE.ME)

ONLINE IS HYPER COMPETITIVE & MATURE

电商超竞争而很成熟

Highly dynamic and evolving China eCommerce market landscape

		Domestic EC	Cross Border EC	Social EC	O2O	B2B	Oversea Commerce
C2C	C2C	   	 	 	<p>To Home</p>         <p>To Store</p>   	<p>Self-run</p>       <p>Marketplace</p>   	<p>Export</p>   <p>Overseas Development</p>    
B2C	Marketplace	   	   	           			
	Pure Player	       	     				
	Bricks & Clicks	   	 				
	Category Specialists	<p>Fresh Food</p>  <p>MBS</p>  <p>Luxury</p> 	<p>MBS</p>  <p>Cosmetics</p> 				

SOURCE: IRESEARCH

**E-COMMERCE IS RAPIDLY
EVOLVING INTO 'NEW RETAIL'**

**THE BOUNDARY BETWEEN
OFFLINE AND ONLINE COMMERCE
DISAPPEARS AS WE FOCUS ON
FULFILLING THE PERSONALIZED
NEEDS OF EACH CUSTOMER.**

CHANGE IS BEING LED BY TECH GIANTS...








**“THE ESSENCE BEHIND NEW
RETAIL IS TO APPLY THE IDEA
AND TECHNOLOGY OF THE
INTERNET TO RESTRUCTURE
PEOPLE, PRODUCTS, AND PLACE
IN AN ALL-AROUND WAY—FROM
THE PLACE OF ORIGIN TO THE
HANDS OF CONSUMERS.”**

**CTO OF HEMA SUPERMARKETS
TMALL FOUNDING TEAM**



SOME OF ALIBABA'S RETAIL INVESTMENTS

INVESTMENT DATE	LOGO	COMPANY	BUSINESS	CHINA LOCATIONS	ALIBABA OWNERSHIP	INVESTMENT AMOUNT
2017 JAN 9 TH		INTIME	DEPARTMENT STORE SHOPPING MALL CHAIN	29 STORES 17 MALLS	73.7%	\$2.6 B
2015 AUG 10 TH		SUNING	ELECTRONICS RETAILER	1,600	20%	\$4.6 B
2017 NOV 20 TH		SUN ART RETAIL	2 SUPERMARKET CHAINS AUCHAN / RT-MART	440	36.1%	\$2.87 B
2017 SEPT 26 TH		NEW HUADU INDUSTRIAL GROUP	SHOPPING MALL & SUPERMARKET CHAIN	128	10%	\$500 M
2018 FEB 11 TH		BEIJING EASYHOME	FURNISHING CHAIN	223	15%	\$865 M

SOME OF TENCENT'S RETAIL INVESTMENTS

INVESTMENT DATE	LOGO	COMPANY	BUSINESS	CHINA LOCATIONS	TENCENT OWNERSHIP	INVESTMENT AMOUNT
2017 DEC 15 TH		YONGHUI	SUPERMARKETS	580+	5%	\$636 M
2018 JAN 15 TH		VIP SHOP	CLOTHES RETAIL 3 RD LARGEST ECOMMERCE PLAYER IN CHINA	N/A	7%	\$604 M
2018 JAN 23 RD		CARREFOUR	SUPERMARKETS	250+	UNDISCLOSED	
2018 JAN 23 RD		DALIAN WANDA	COMMERCIAL PROPERTY, MALLS, HOTELS	185+ MALLS 90 HOTELS	4.12%	\$1.5 B
2018 FEB 23 RD		BETTER LIFE	SUPERMARKETS, MALLS	592	6%	\$140 M



盒马鲜生 会员店



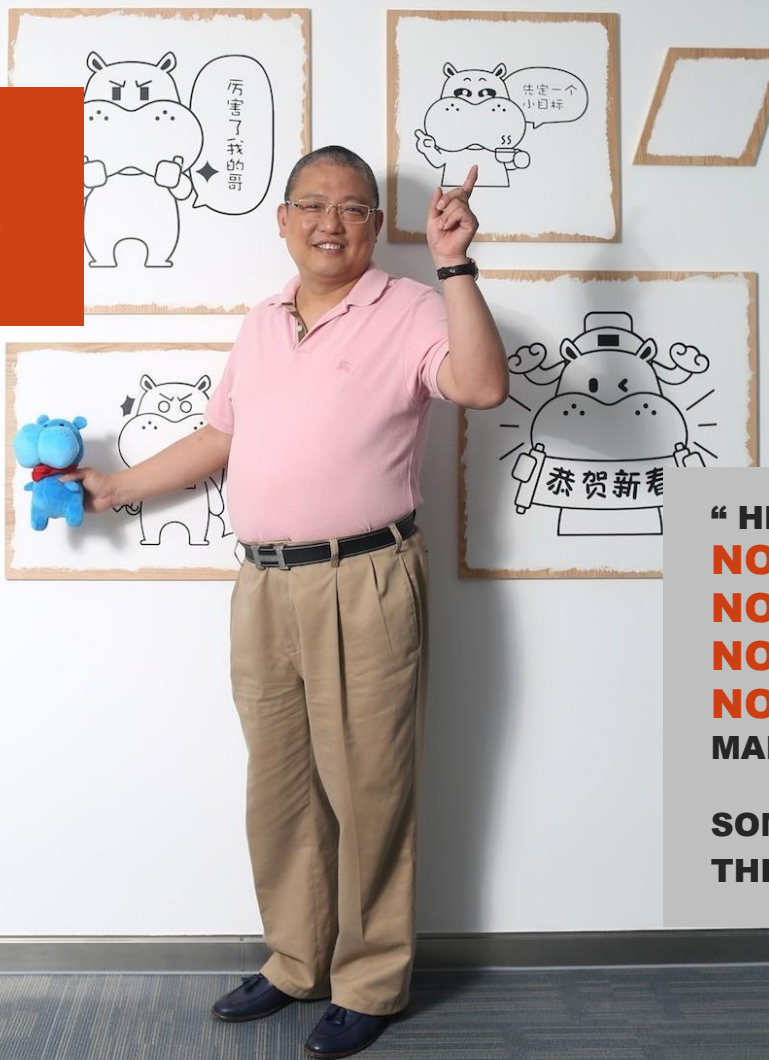
Alibaba Group

阿里巴巴集团

FRESHIPPO

China
Channel

YI HOU 侯毅
HEMA FOUNDER & CEO



“ HEMA IS
NOT A SUPERMARKET, IT’S
NOT A CONVENIENCE STORE,
NOT A RESTAURANT,
NOR IS IT A VEGETABLE
MARKET.

SOME PEOPLE CALL IT
THE **4 NOTS** ”

VIDEO TIME

GET PREPARED FOR SOMETHING TO NOT WORK ;-)

YI HOU 侯毅
HEMA FOUNDER & CEO

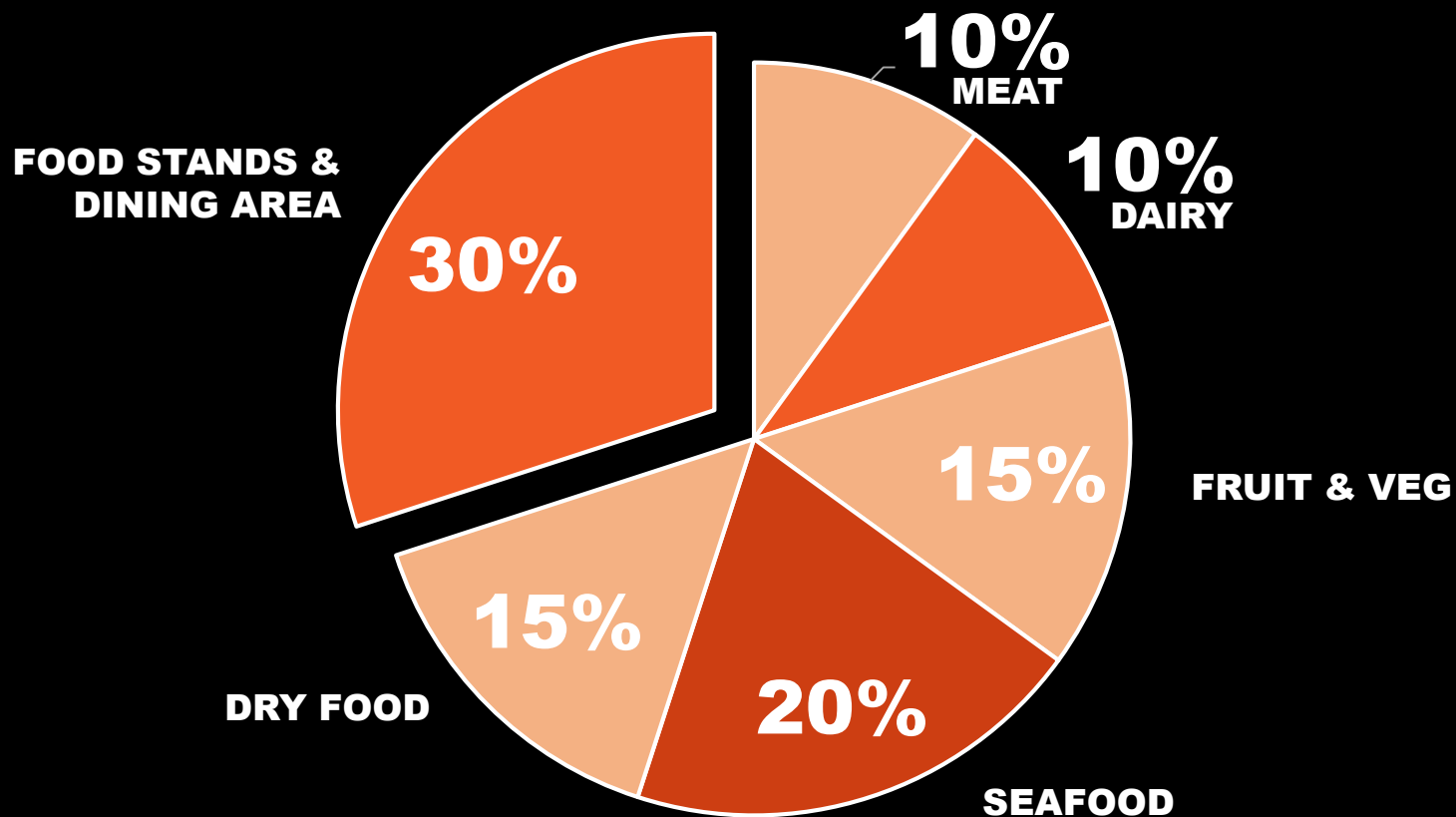
淘宝大学轻课堂讲师:

侯 毅

盒马创始人 CEO

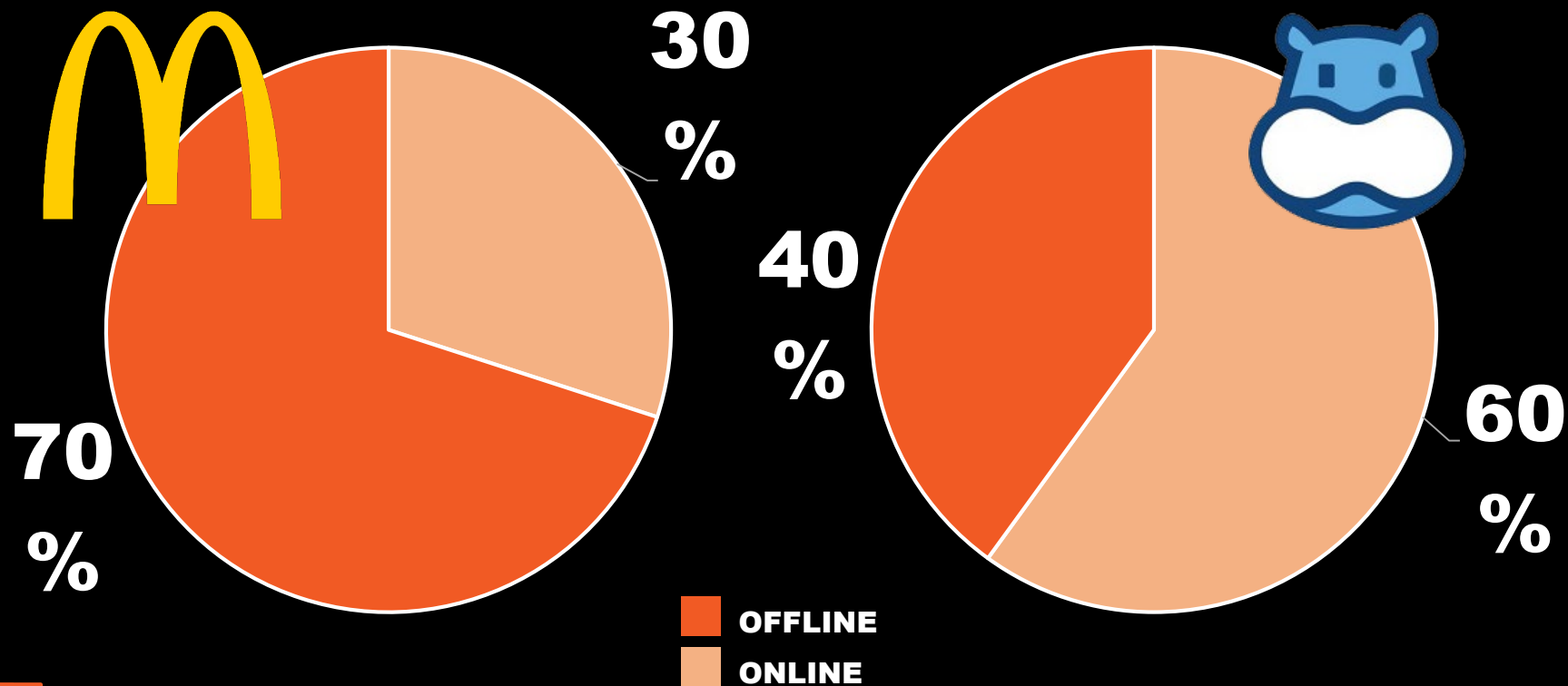
**“THE MAJOR GOAL IS TO DRIVE
OFFLINE CUSTOMERS TO SHOP ONLINE”**

FLOOR SPACE BREAKDOWN IN TYPICAL HEMA STORE (2017)

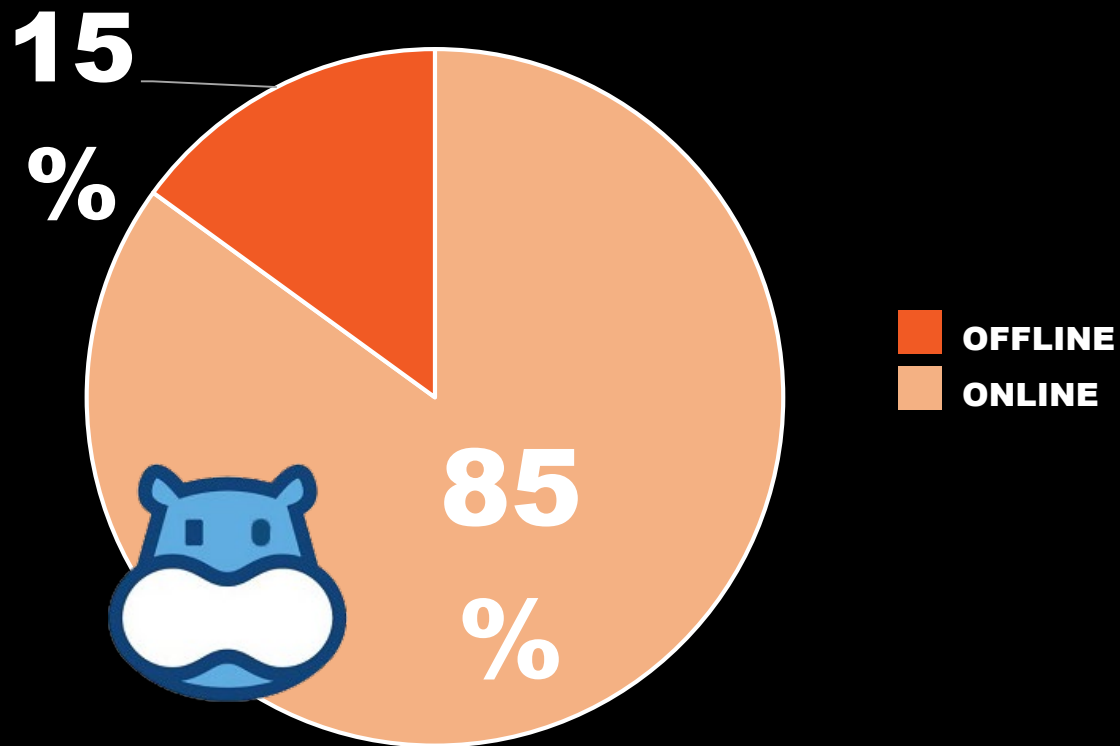




OFFLINE VS. ONLINE SALES



THE GOAL





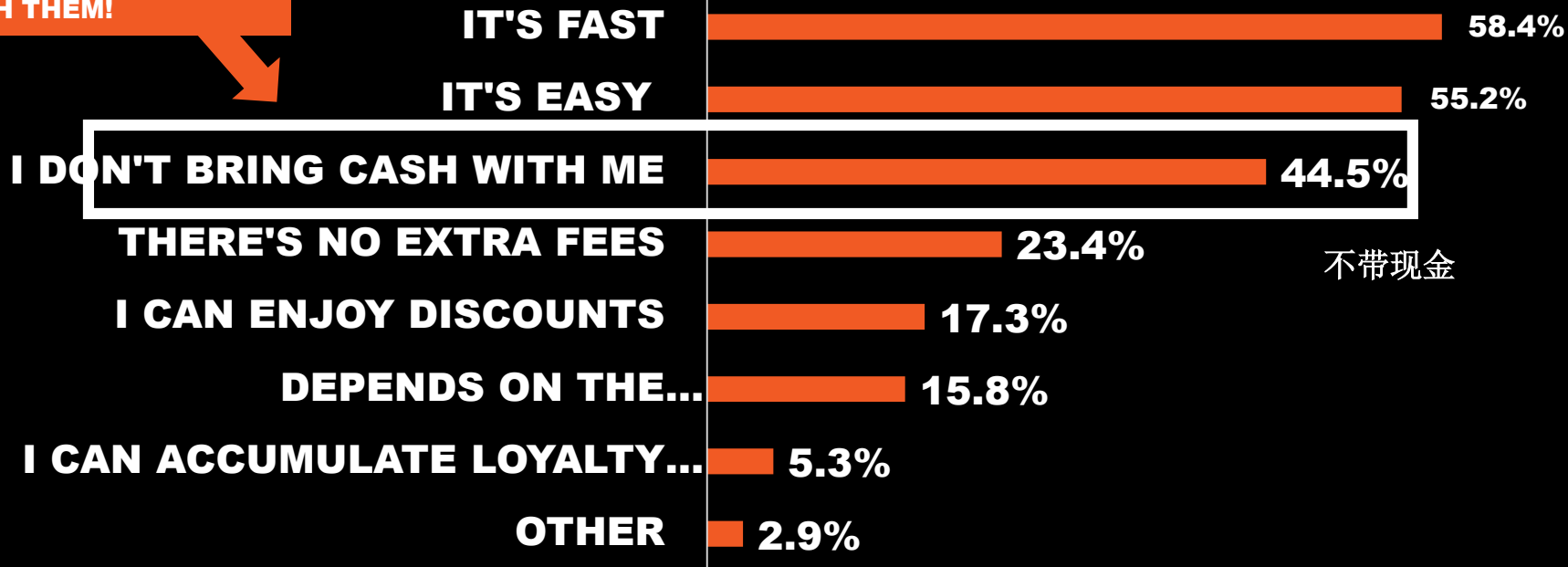
盒马

THE HEMA APP



REASONS FOR USING MOBILE PAYMENTS FOR OFFLINE TRANSACTIONS

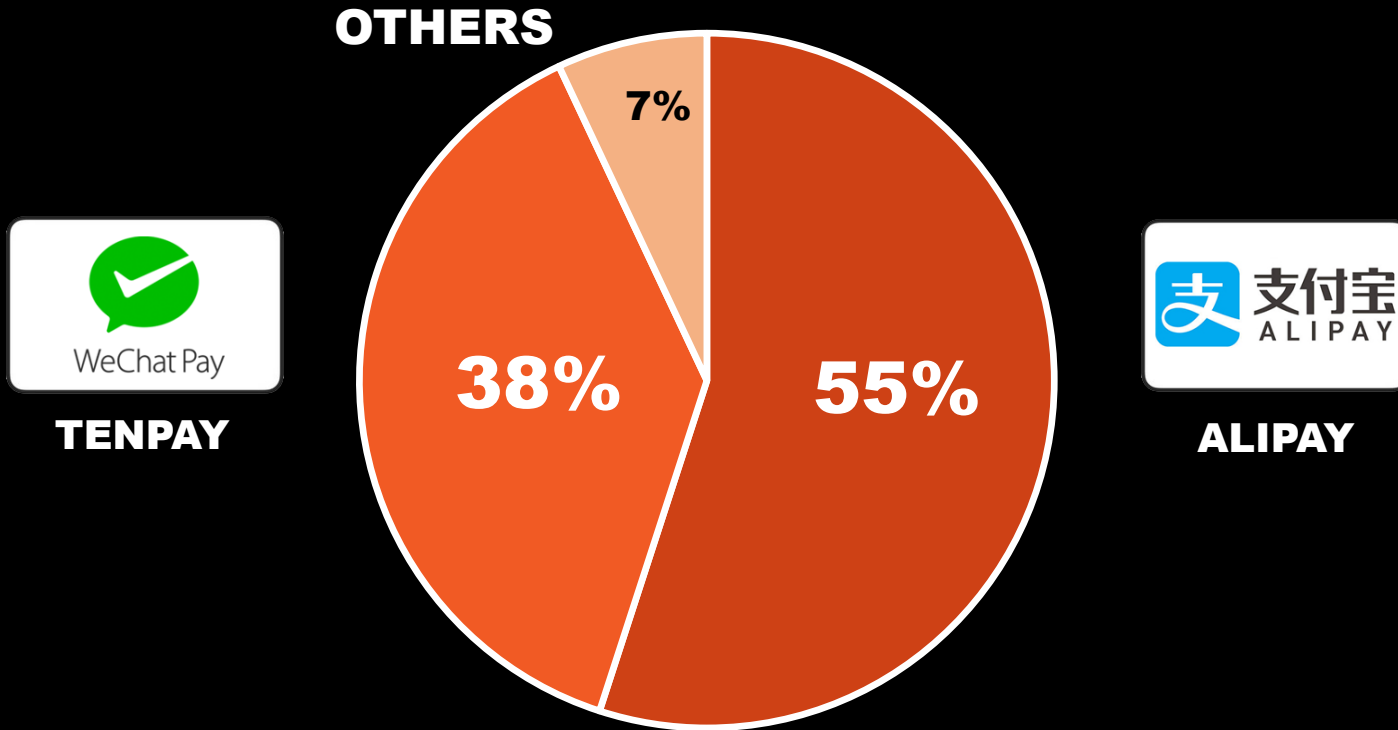
NEARLY HALF OF
USERS CLAIMED THEY
DO NOT CARRY CASH
WITH THEM!





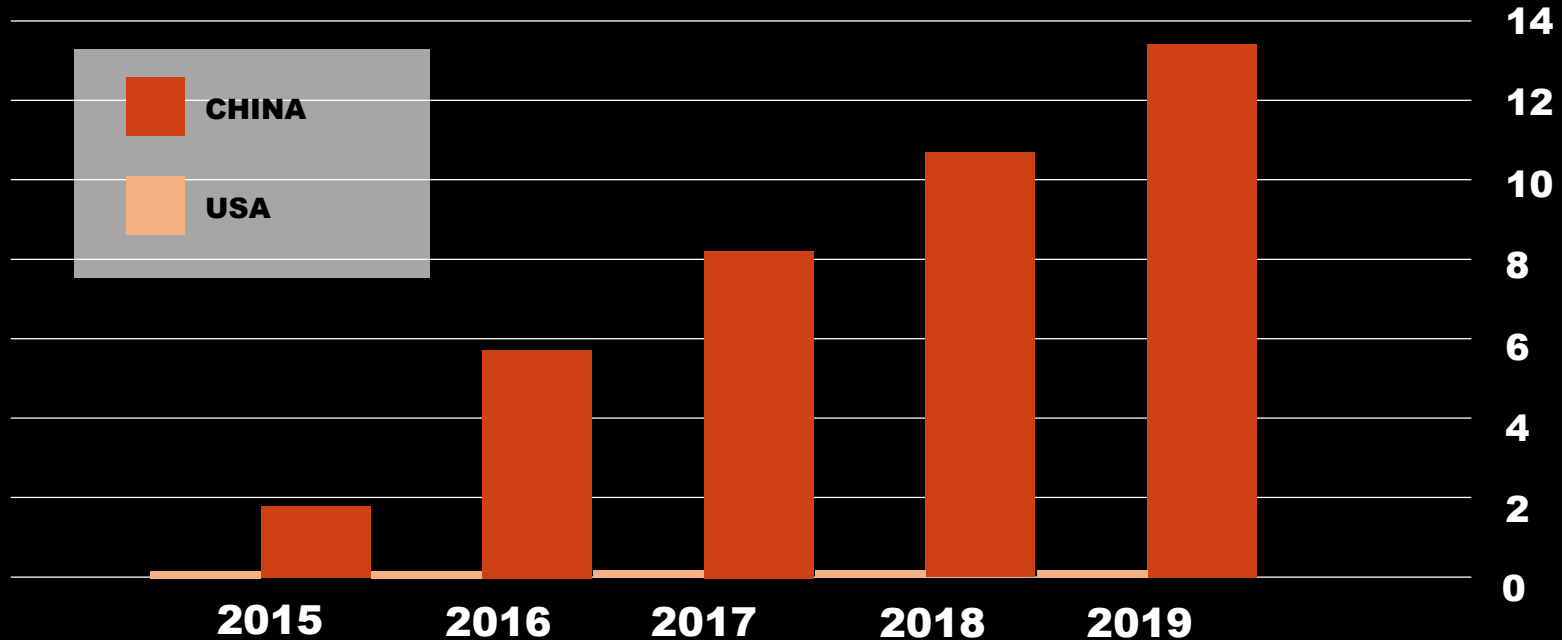
支

3RD PARTY MOBILE PAYMENTS MARKET (2018)





3RD PARTY MOBILE PAYMENTS (\$TN)



DATA SOURCE: FORRESTER RESEARCH (US), IRESEARCH (CHINA)

**“IN TRADITIONAL RETAIL THE
PAYMENT IS ACTUALLY SEEN AS A
PROCESS THAT HAS TO BE DONE BUT
DOES NOT CREATE VALUE IN OF
ITSELF.**

**IN THE FACE OF THE EMERGENCE OF
MOBILE PAYMENT WE HOPE THAT IT
IS POSSIBLE TO CREATE VALUE IN
THE PAYMENT LINK ITSELF...”**

LILIAN HUANG 黄丽

**DEPUTY GENERAL MANAGER OF
WECHAT PAY 微信支付副总经理**



CASE STUDY

DIGITALIZATION OF CUSTOMER EXPERIENCE MORE THAN JUST PAYMENTS...





支付成功

麦当劳餐厅(深圳)有限公司

¥ 11.50



麦当劳
查看我的会员积分

完成



晚上7:44

... 4G 27%



麦享会会员卡



Matthew Brennan

累计积分11.5 可用积分11.5



离下一个圆筒

—— · 还差27.5点积分 · ——

柜台手机支付前出示会员码 1元积1分

[查询积分 >>](#)



看看我能兑换什么



积分规则



其他

请留意取餐区A屏
Watch No. in screen A
129

欢迎光临深圳麦当劳机场交通中心餐厅
1420293
深圳市宝安区深圳机场交通中心210A,211A
0755-23459416
收据

ORD #29 -REG #1- 20/04/2017 19:41:52
数量 产品 TOTAL
1 大零度可乐 11.50
不要 冰

小计 11.50
外带 Total 11.50
手机支付 11.50

手机支付(微信)交易明细

账户支付: 11.50
优惠金额: 0.00
支付交易号:4006502001201704207720904010
商户交易号:303958712

发票日期为实际开具当日
建议您在消费后48小时内扫码开具发票
超过建议时间,如无法开票请联系餐厅



欢迎您再次光临!
顾客关怀热线: 400-9200-205
如需麦咖啡产品请到麦咖啡柜台领取

晚上7:46

... 4G 27%

晚上7:53

... 4G 25%

× 发票开具



增值税电子普通发票

购买方 请输入购买方名称

手机号码 必填项

邮箱 建议填写, 取票更方便

开票金额

合计 11.50元

餐饮服务 11.50元

注: 开票金额不包含食品礼券、预付卡、礼品卡等消费金额

下一步

← 发票

增值税电子普通发票

付款方 石诺商务咨询(上海)有限公司

收款方 麦当劳餐厅(深圳)有限公司

发票金额 ¥11.50

开票时间 2017.4.20

查看发票 发票详情

公众号

晚上8:09

用餐评价提醒

4月20日

您好, 感谢您的光临!

餐厅名称: 深圳麦当劳机场交通中心餐厅

用餐时间: 2017/4/20 19:42:30

诚邀您将今天的用餐体验反馈给我们, 并收下我们的感谢优惠券, 我们珍视您的评价。请点击详情。

详情

< 返回上一页



请您根据总体用餐体验的满意度进行评分



5星

请您根据员工的友善度进行评分



5星

请您根据服务速度进行评分



4星

请您对食物和饮料的品质进行评分



4星

请您对整洁度进行评分



5星

您所收到的餐点是否准确?



麦当劳(中国)有限公司

感谢券5元小食换购

请到店后点击使用

可用时间: 2017.04.20-2017.05.03, 周一至周日 全天

领取到卡包



FACIAL RECOGNITION

腾讯优图·开放平台

首页

技术体验中心

开发者中心

企业服务

关于优图

登录 | 注册

音频技术

智能P图技术

图片处理技术

性别:男
年龄:53
表情:笑逐颜开
魅力:58



上传本地照片

RESPONSE:

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  "image_width": 545,
  "face": [
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      "y": 112,
      "height": 253,
      "width": 253,
      "pitch": -2,
      "roll": -6,
      "yaw": 9,
      "age": 53,
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      "glass": false,
      "expression": 34,
      "beauty": 58,
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VIDEO TIME

GET PREPARED FOR SOMETHING TO NOT WORK ;-)





LOGISTICS





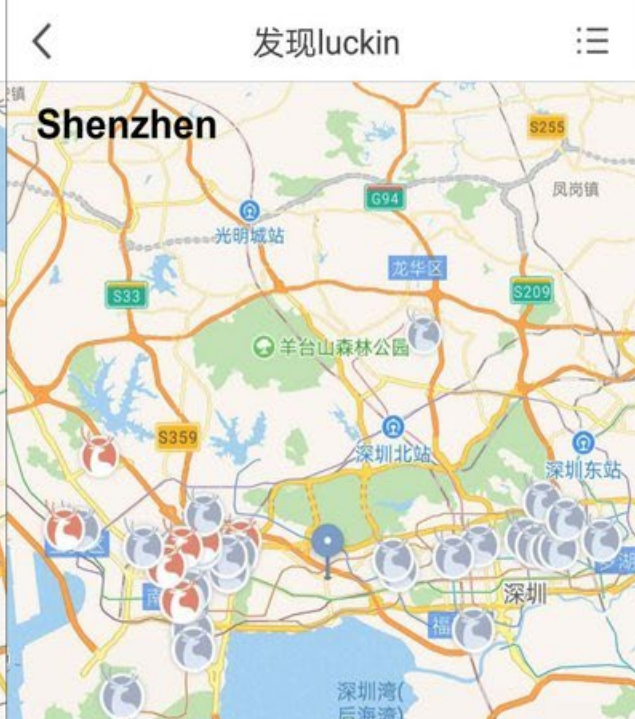
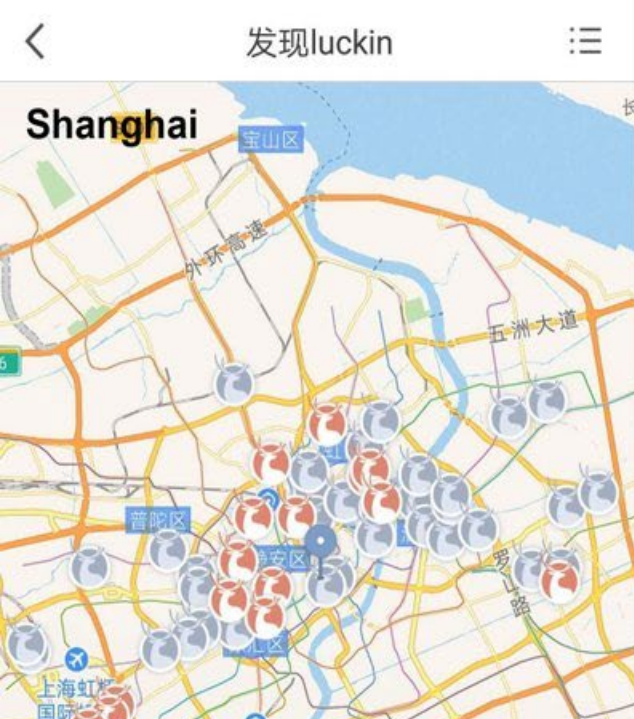
3 KM RADIUS
30 MINS DELIVERY



luckin coffee | 瑞幸咖啡



luckin coffee | 瑞幸咖啡



NOV 2017 – 0 STORES
MARCH 2019 – 2,200 STORES





星月里店

距您2.1km

自提 外送

现在下单

ORDER NOW

2. Order and pay in app

口味收藏

MY FAVORITES

优惠活动

买2赠1, 买5赠5

LUCKIN PROMOTION

发现luckin



首页



菜单



订单



购物车



我的

1. Scan to download app

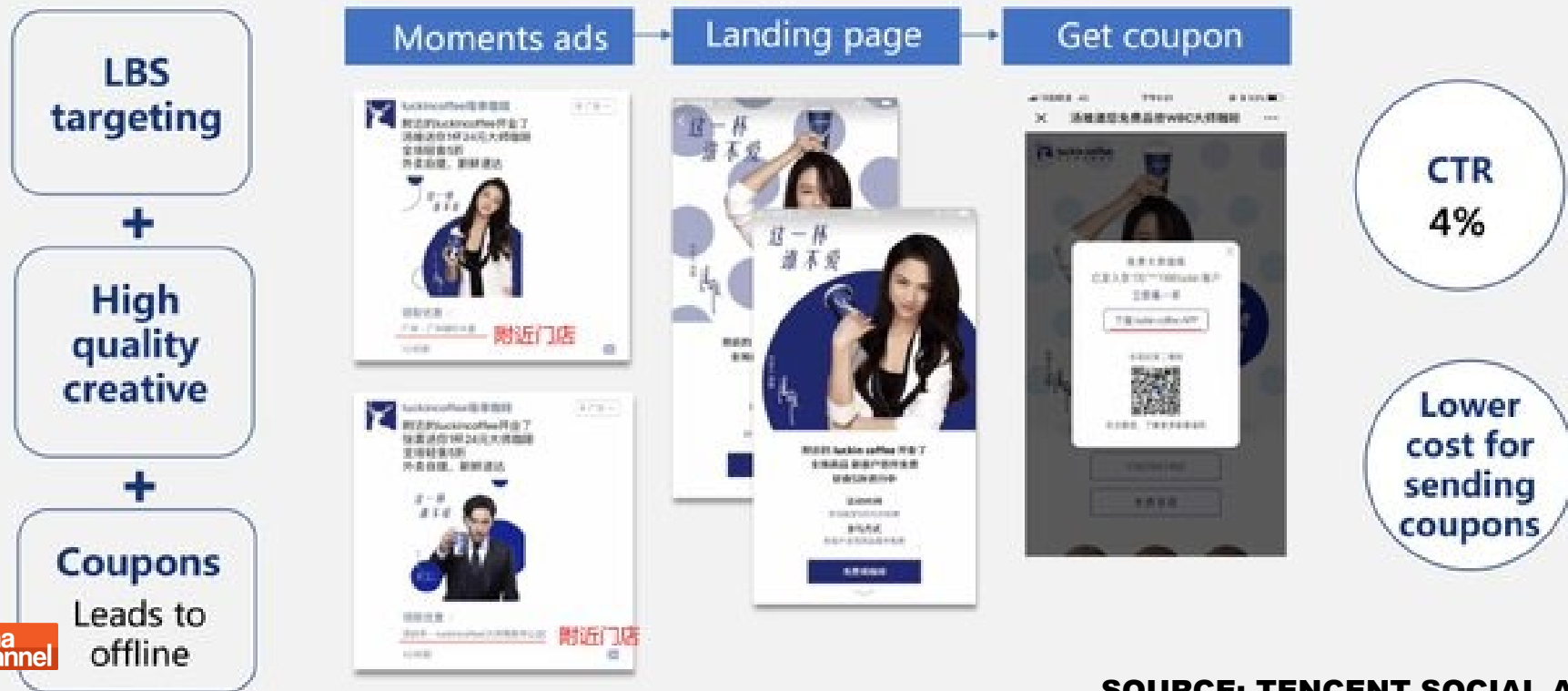
3. When order is ready confirm it's yours
by holding up your in app order code to this
scanner

瑞幸咖啡 | 以微信作为持续获客渠道

Luckincoffee | Use Wechat as a channel to gain customers continuously



Conversion: Highly Efficient Local promotion for new stores opening



SOURCE: TENCENT SOCIAL ADS

3 CHINA MODELS AIMED AT INCREASING EFFICIENCY & REDUCING COST



VIDEO TIME

GET PREPARED FOR SOMETHING TO NOT WORK ;-)



VIDEO TIME

GET PREPARED FOR SOMETHING TO NOT WORK ;-)



Carrefour 家乐福
le marché

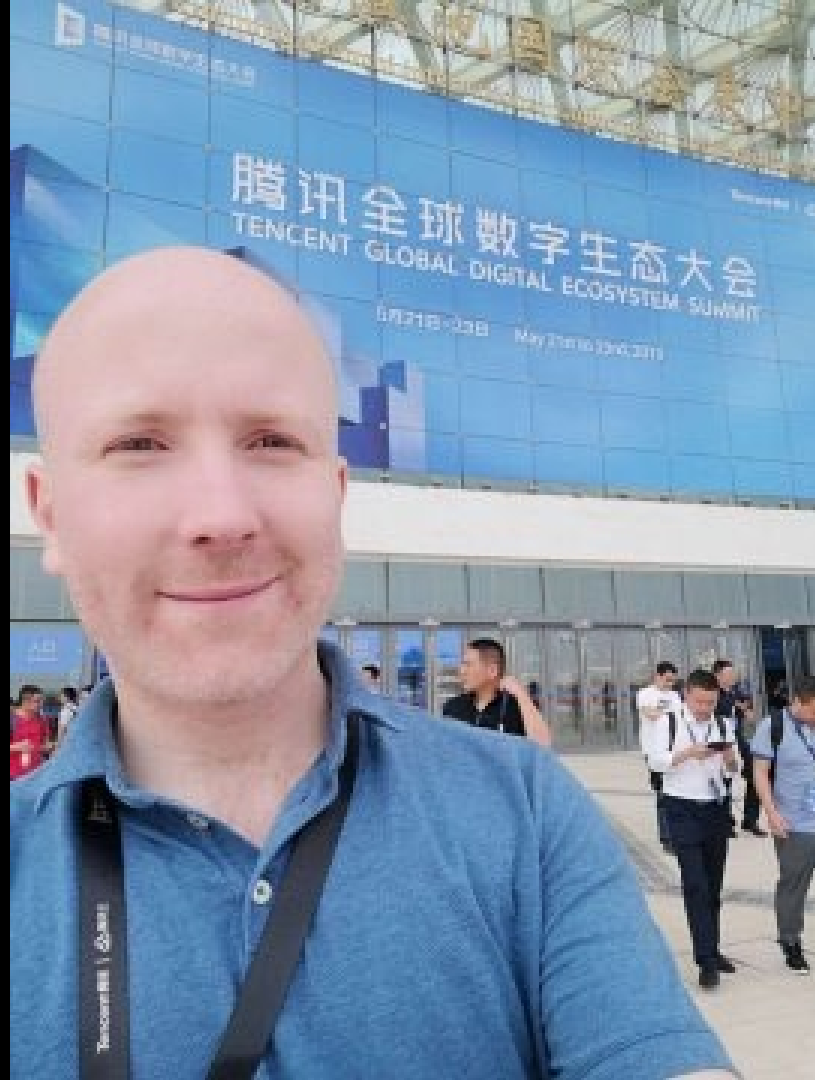
“IN OUR BEST PERFORMING STORES 38% OF CUSTOMERS WERE USING THE MINI PROGRAM. THIS WASN'T A SHORT-TERM SPIKE. IF SOMETHING ISN'T WORKING AT WAL-MART, IT'LL BE KILLED.”

**TED HOPKINS, SENIOR DIRECTOR
WALMART CHINA ECOMMERCE**

NOV 2018: 17 MILLION USERS



WE SAVED THE BEST TILL LAST...



首届腾讯全球数据化生态大会





姓名	访客
年龄	36
性别	男
能力	57
来源	云端
出现次数	1
最近出现时间	11:44:06

实时进店顾客

2019-05-22 11:46:26 星期一



门店转化率



门店分析



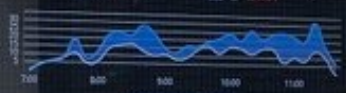
- 访客 88分
- 访客 77分
- 访客 70分
- 访客 67分
- 访客 64分
- 访客 64分
- 访客 63分
- 访客 63分
- 访客 62分
- 访客 60分



门店关注

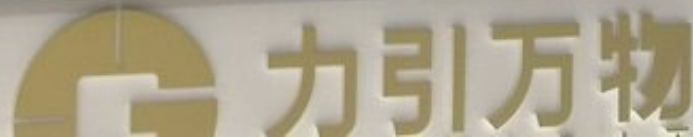
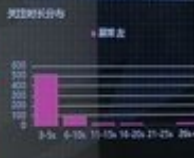


进店人数: 213人
 进店-出: 28.6%
 转化率: 45.2%
 进店-出: 15.4%




门店关注排行

排名	姓名	关注人数	关注占比
1	张三	143	20.9%
2	李四	8	1.1%
3	王五	24	3.4%
4	赵六	17	2.4%
5	孙七	320	45.2%













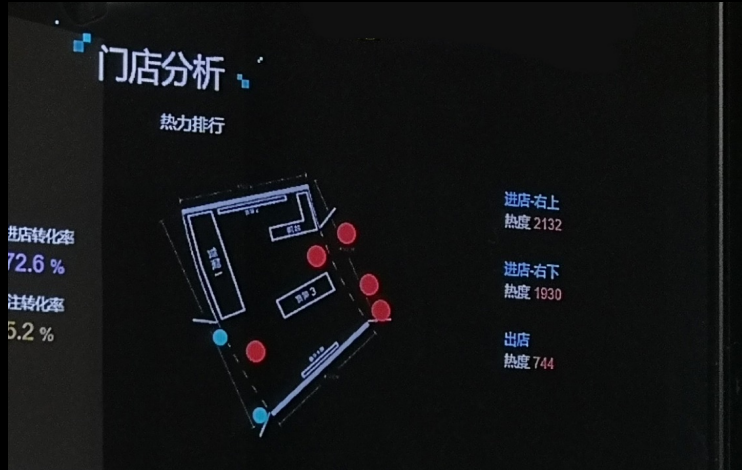




姓名	访客
年龄	36
性别	男
魅力	57
来源	云端
出现次数	1
最近出现时间	11:44:06

- NAME
- AGE
- GENDER
- MOOD
- ORIGIN
- TIMES APPEARED
- LAST TIME APPEARED

1		访客	88分
2		访客	77分
3		访客	70分
4		访客	67分
5		访客	64分
6		访客	64分
7		访客	63分
8		访客	63分
9		访客	62分
10		访客	60分

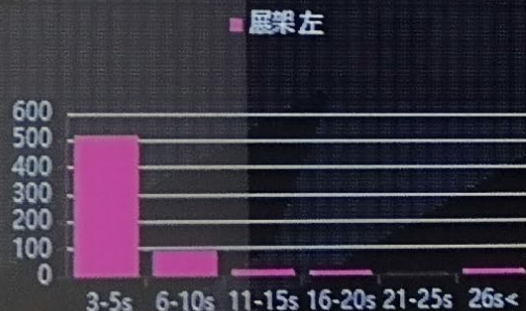


BROWSING TIME BREAKDOWN (DISPLAY STAND LEFT)

点位关注排行

展架	关注人数	关注总时长
左	149人	3589s
上	51人	361s
右	41人	339s

关注时长分布



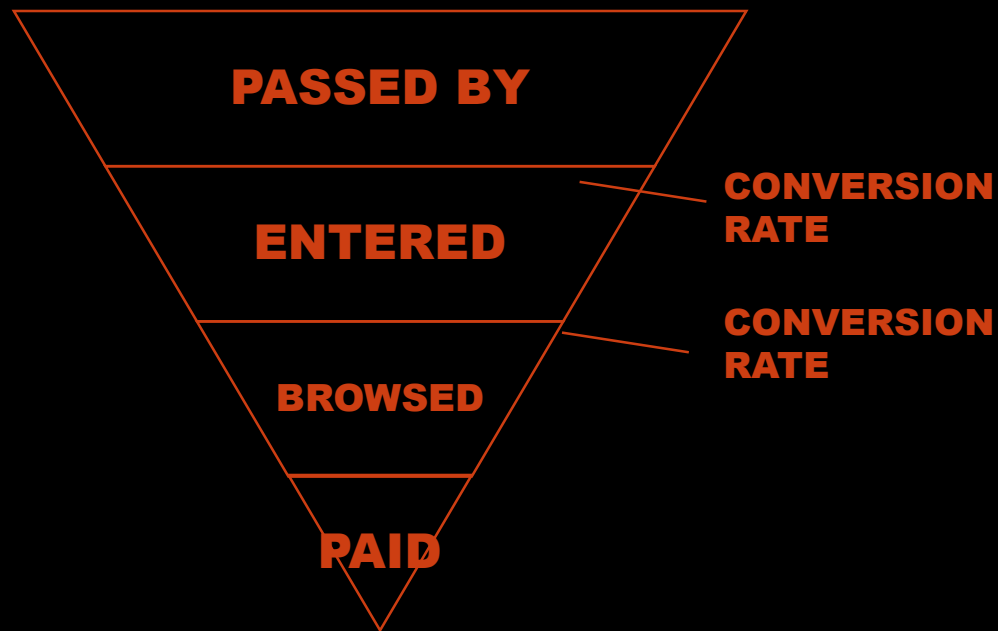
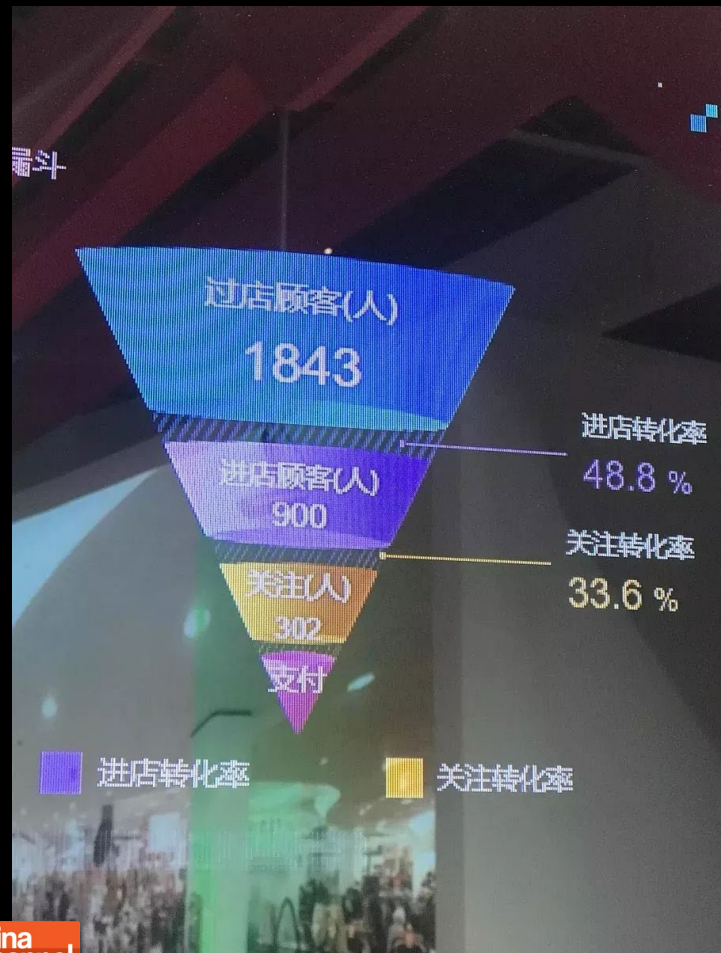
关注用户画像分布



- 新顾客129人 86.58%
- 老顾客20人 13.42%
- 回头客13人 65%

**DISPLAY STAND LEADER BOARD
RIGHT SIDE (BLUE)**
PEOPLE BROWSED: 41
TOTAL TIME BROWSING: 339 SEC

**GENDER BREAKDOWN
NEW / OLD / RETURNING CUSTOMER
BREAKDOWN**



FIND ME AT:

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TWITTER: @MBRENNANCHINA

PODCAST: CHINA TECH TALK

LINKEDIN: LINKEDIN.COM/IN/MATTHEW-BRENNAN/

WECHAT:





SMART RETAIL / NEW RETAIL IN CHINA
THE UNICHANNEL FUTURE OF NEW RETAIL
MATTHEW BRENNAN



Matthew Brennan

Managing Director
China Channel