

Mobility Re-imagined

Where are your shoppers in the new norm?

MEET OUR SPEAKERS



Dr. Wong Chin Chin is **Regional Head of FMCG, Retail & Diversified** in Business Insights, providing solutions across verticals by integrating data, insight, media & content to deliver business outcomes.

She holds a PhD in business statistics & econometrics with over 16 years experience in market research, analytics & advisory. She is an experienced adviser who delivers strategic, commercially oriented business direction to clients.



Zoe Cheng is the **Head of Growth** of Cosmose AI HK & International, responsible for business expansion and growth of Hong Kong & International markets. She actively identifies new opportunities and develops strong ties with brands to provide the best digital and data solutions for her clients.



OUR DATA & OUR AI MODELS

Industry-specific products and services to engage customers

Their Digital behaviour
culled from **400,000 apps**

Their Offline behaviour
gathered from **1 million**
point of interests

Their Content Consumption
Patterns derived from
800 million videos views

Their Social media use
analysed from **150 million**
sources

375 M
CONSUMERS



TELECOMS & ELECTRONICS

- High value customers
- Consumer churn prediction & switchers
- Market share insights
- Demand Planning
- Retail Outlet optimisation
- Competitor audiences insights



RETAIL & AUTOMOTIVE

- Shopper segmentation
- Consumer intenders
- Online to offline attribution
- Store visit matrix
- Retail outlet location optimisation
- In-Mall Analytics
- Share of brand analysis
- Customer mobility visualisation & targeting



CONSUMER GOODS

- Life stage prediction (Mothers, Millennials)
- Brand share analytics
- E-commerce integration
- Online to offline attribution



FINANCIAL SERVICES

- Digital user acquisition
- Branch visit matrix
- Brand affinity
- Credit Appraisal / fraud validation



TRAVEL & TRANSPORT

- Traveller segmentation & targeting
- Travel pattern analytics (route, frequency, type)
- Mobility pattern analysis

*Consumer profiles from the following countries : Indonesia, Malaysia, Singapore, Thailand,, Philippines, S.Korea, Sri Lanka, Bangladesh, Cambodia and Vietnam

SYNERGY OF OUR CAPABILITIES

cosmose AI

Leader of Offline behavioural data technology to understand, predict and influence shoppers

- Cosmose AI of the most accurate 1.6M location positioning
- 1B reach with +400K app partners within your reach
- Cosmose Analytics to understand your competitors and your own offline stores/ locations

ada
analytics · data · advertising

Largest Independent Data and AI company in Asia that designs and executes integrated digital, analytics and marketing solutions:

- Over 375 million unique users
- +400k app usage information
- Business insights, data enrichment and data management platforms
- End-to-end data driven digital marketing solutions for growth hacking, funnel and goal optimisation



THE CURRENT ECOSYSTEM OF THE RETAIL INDUSTRY

HOW HAS PANDEMIC ACCELERATED THE CHANGES IN RETAIL INDUSTRY?

6



DATA

Big data is being utilized to better understand consumer needs in order to offer them products and services that provide added value



CONVENIENCE

Products, systems and services nowadays must accommodate to the busy lifestyles of consumers by delivering a seamless purchasing process



MULTI-FUNCTIONAL

Advanced and complex systems are executed quickly around the customer to deliver a seamless shopping experience



LEVERAGING TECHNOLOGY

The use of three key technologies; cloud commerce, digital shopping applications and location data analytics allows retailers to respond to situations and make changes in real time



PERSONALISED OFFERINGS

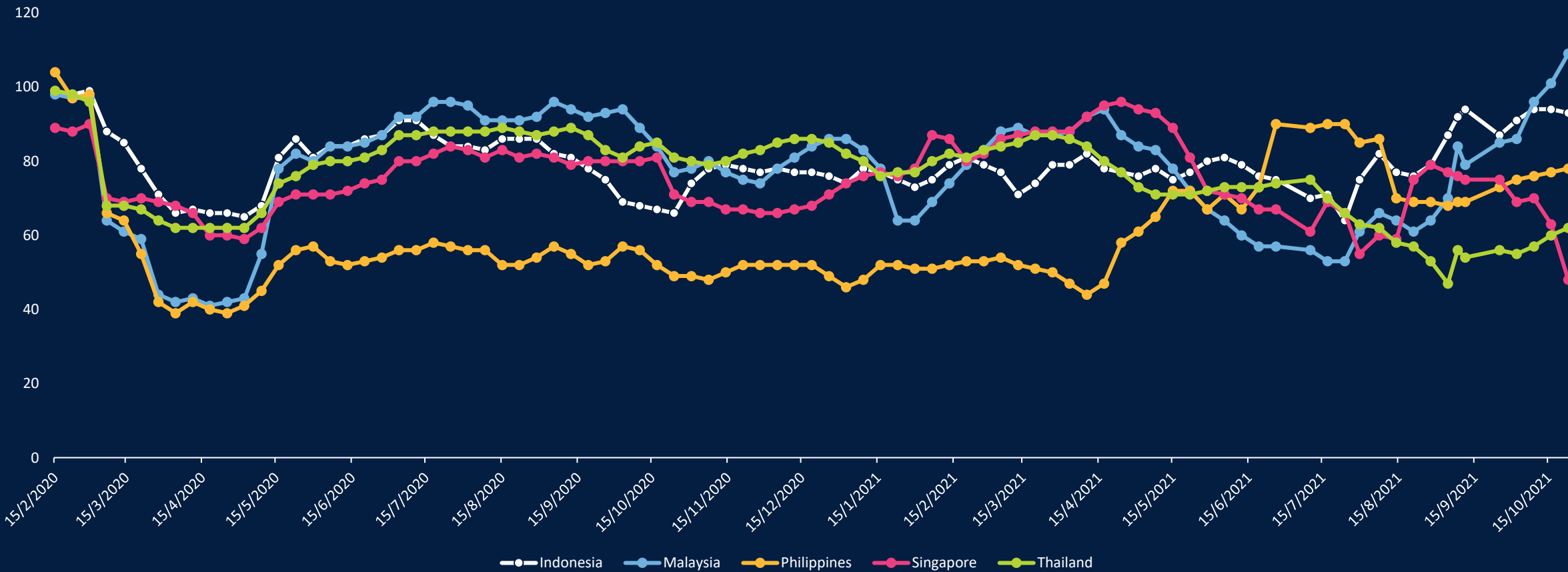
A real-time omnichannel strategy empowers retailers to personalize experiences according to customers' desires



HAVE WE RETURNED TO PRE-PANDEMIC MOVEMENT?

MALAYSIA LEADS THE RACE AFTER INTERSTATE TRAVEL IS ALLOWED

Source: ADA Recovery Index

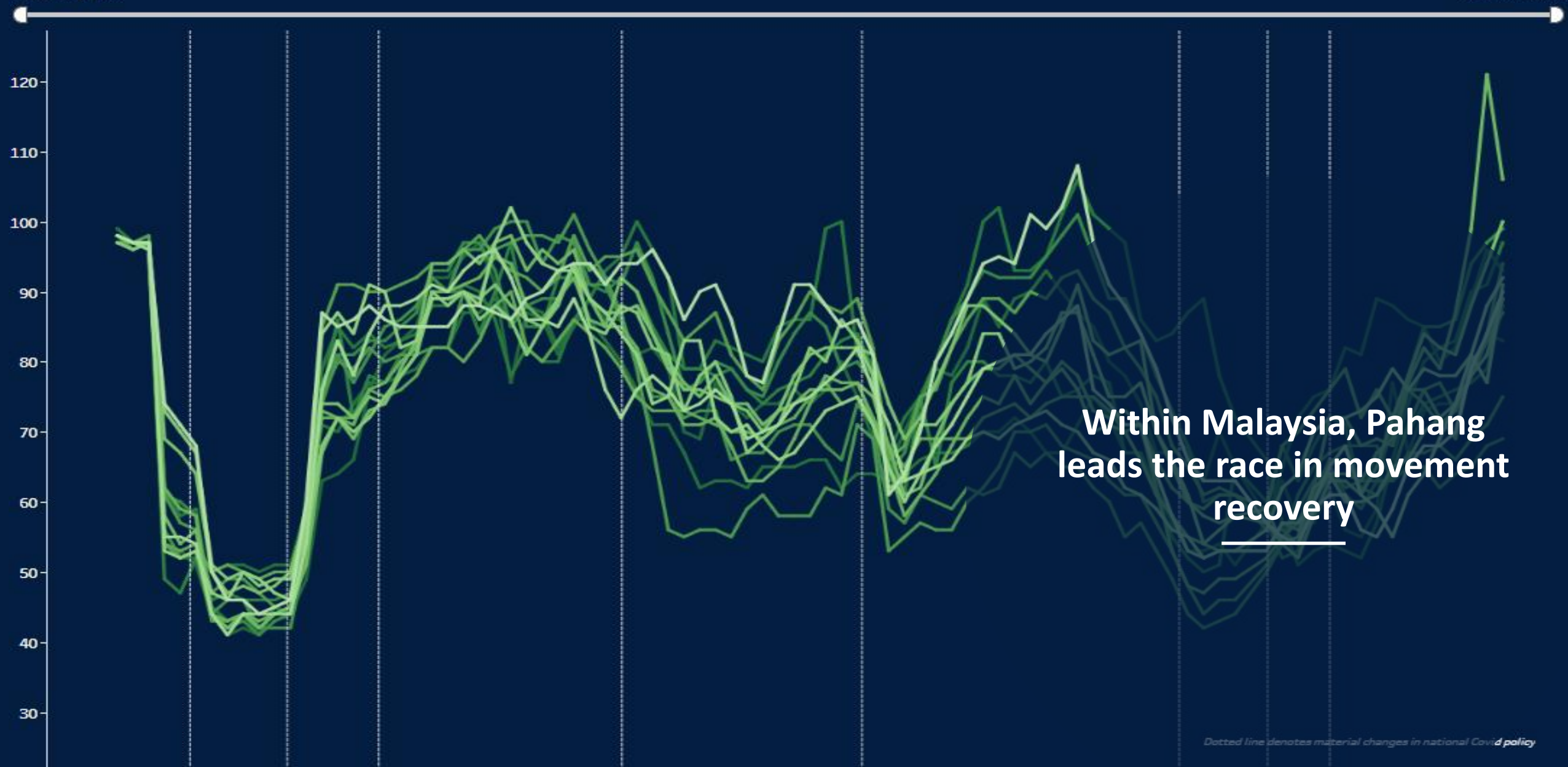


HOW IS THE MOVEMENT IN MALAYSIA?

9

February 2020

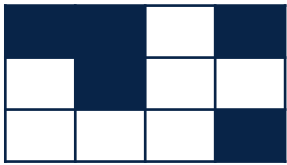
October 2021



WHAT DOES THIS MEAN FOR RETAIL?

11

What questions should you be asking?



Uncover Mobility Patterns

Who are the people seen around specific POI?

Where should I place my digital OOH advertisement in the New Norm?



Footfall Levels

How is the movement of the target audience at different time of days and different days of the week?



Consumer Profile

How is the behaviour and profile of mall visitors?



Distance Travelled to Retail Outlets

from either home or work, shops exclusively or cross-presence?



Outlet Overlap

Who are the shoppers who frequent different malls?



EMINENT AMERICAN COSMETIC BRAND

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CLIENT BACKGROUND

- The client's revenue was attributed to physical retail outlets in high-end departmental stores rather than e-commerce.
- With a **country-wide lockdown** in Thailand, the client had to drastically pivot its sales and marketing strategy.

OUR SOLUTION

- We segmented client's potential customers into Brand Loyalists, Online Shoppers, Premium Skincare Users and Brand Aspirers.
- Through a mix of 1st party, 2nd party and ADA's XACT data, we reached out to these segments.
- We utilised our Customer Acquisition Model to reach new prospects and convert potentials to customers.

THE OUTCOME

- +490% growth in e-commerce monthly sales compared to pre-COVID-19 periods.
- Exceeded the e-commerce target by 500%.
- 275% growth vs. promotional months.
- Return on Ad Spend (ROAS) grew by 24.5x.

RETAIL INSIGHTS SOLUTION CASE STUDY: PROMINENT SUPERMARKET IN CAMBODIA 13

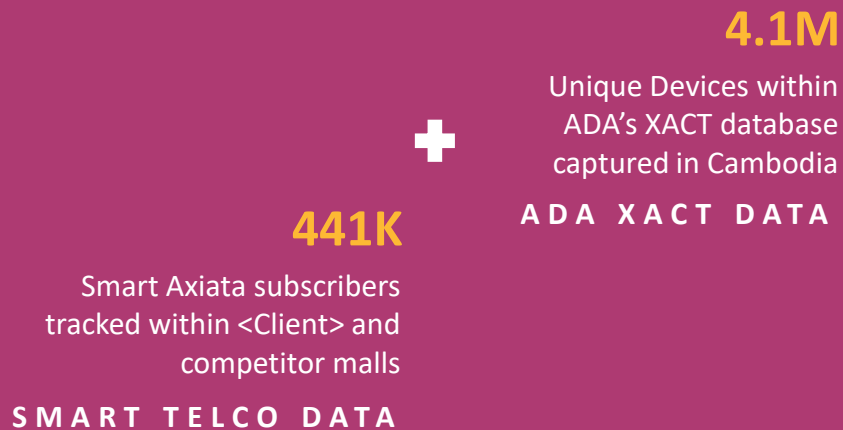
Key Objective:

Provide supporting business insights for potential tenants at new mall.

Locations Under Analysis:

- 2 existing Client's malls
- 7 competitor malls selected by <Client>
- Catchment areas* surrounding existing <Client> Malls and catchment area surrounding the location of the new <Client> Mall

Data Sources:



**Catchment areas refers to a 10km radius surrounding a specific location to allow comparison of population within catchment area (potential customers) and mall-goers*

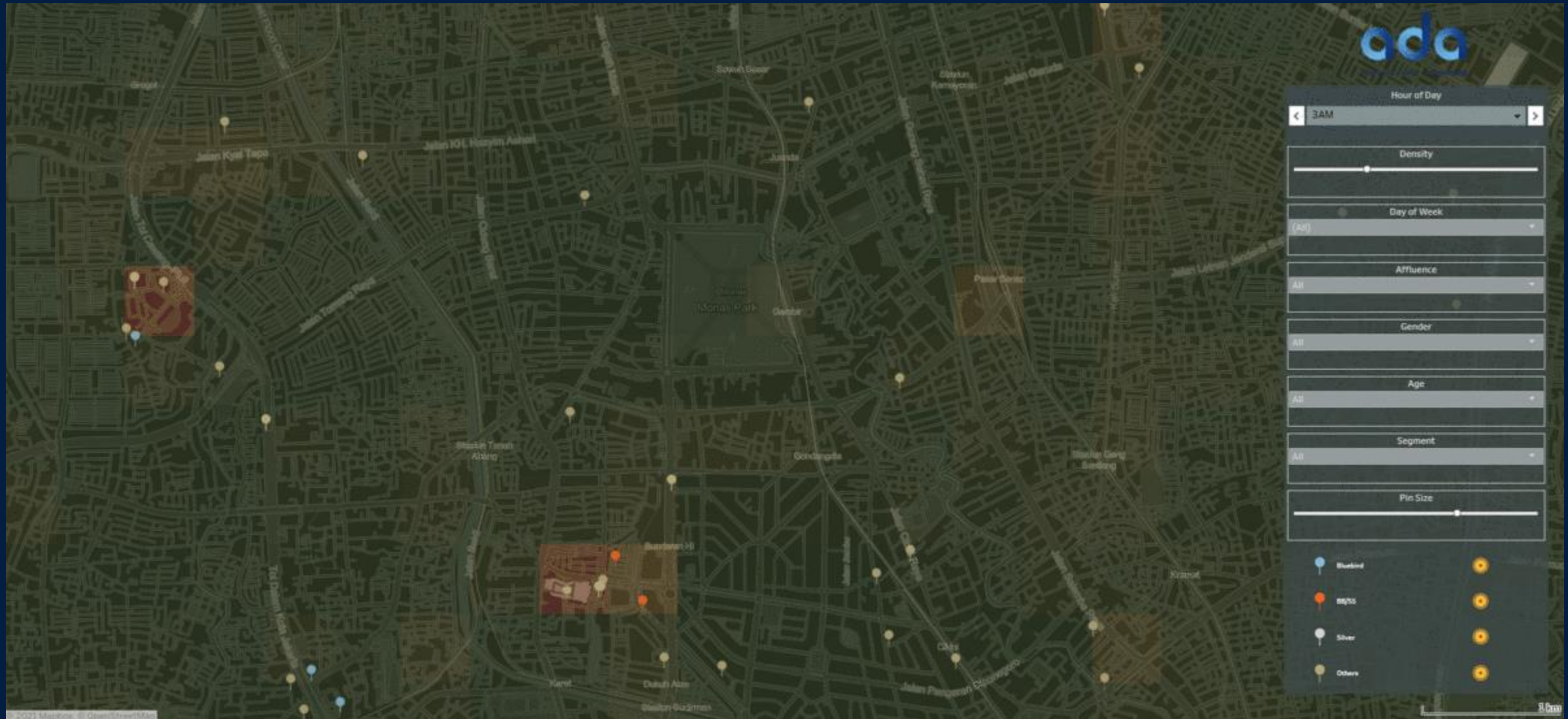
OUTCOME 1: RETAIL INSIGHTS

- Determined strengths at existing <Client> malls compared to the demographic and psychographics of the catchment areas
- Understanding consumer segments existing <Client> malls are attracting through their retail brands and service offerings
- Profiled potential consumers for the upcoming mall (<Client> 3) based on the catchment area

OUTCOME 2: COVID-19 AND SEASONAL INSIGHTS

- Identified significant consumer behaviour changes post-pandemic that affected all malls, specifically in willingness to travel
- Determined type of consumers competitors were more successful in attracting despite pandemic situations

FLEET MANAGEMENT CASE STUDY: TAXI SERVICE IN INDONESIA



E-WALLET USE CASE: E-WALLET PLAYER IN MALAYSIA

01



Real-Time Push Notification

- Running push notifications based on user's live location to remind them to use the app for payment at the merchant

02



Activating Users

- Running targeted campaigns on users that regularly visit merchants but do not use the app as the form of payment

03



Acquiring Merchants

- Targeting and onboarding merchants whom users regularly visit but are not yet on the merchant ecosystem



LOOK EAST: HOW RETAIL RECOVERED IN CHINA?

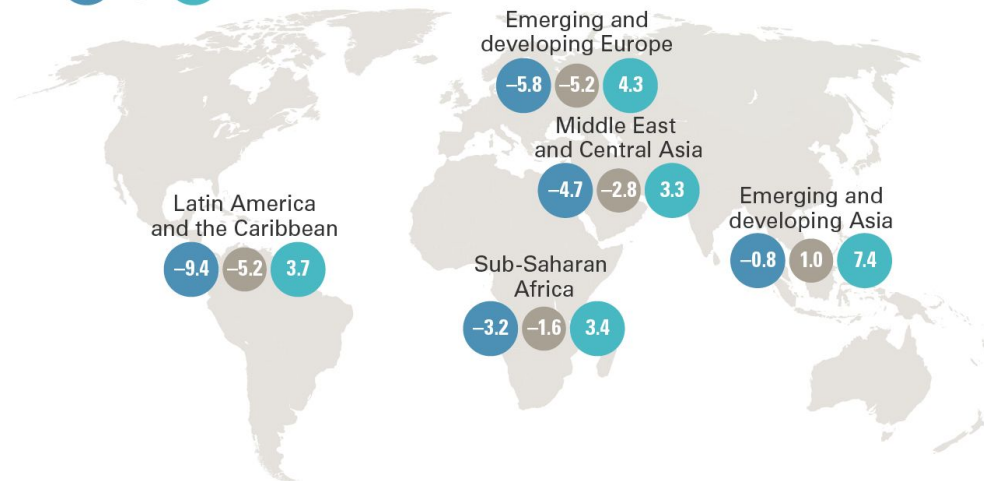


Reinventing Retail from China

RECOVERY ON ASIAN ECONOMIES

Quickest to bounce back globally at growth rates of 7.4% in 2021

Emerging market and developing economies



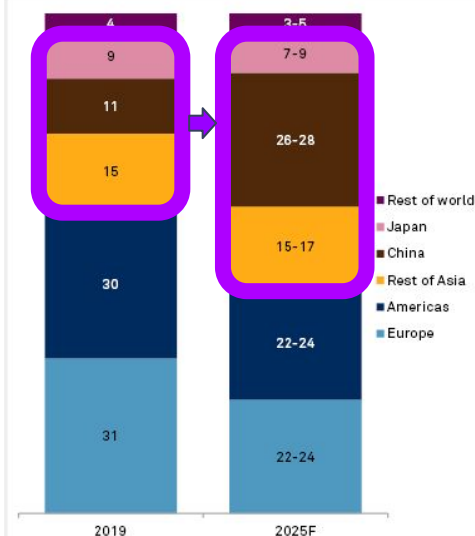
● 2020 growth projection (as of June 2020)

● 2020 growth projection (as of April 2020)

● 2021 growth projection (as of June 2020)

Source : Vanguard, using data as of June 24, 2020, from the International Monetary Fund.
Bain & Co.

Personal luxury goods market by region (%)



As of May 7, 2020.

Total value of personal luxury goods market in 2019 is €281 billion. The market size is expected to reach between €320 billion to €330 billion by 2025.

Sources: Bain & Co., Altgamma

IN PARTICULAR, FOCUS IS ON...

Real GDP Growth Projections, YoY

	2020	2021	2022
Australia	-3.8	3.2	3.1
China	1.8	8.0	4.9
India*	-9.9	7.9	4.8
Indonesia	-2.4	4.0	5.1
Japan	-5.3	2.3	1.5
Korea	-1.1	2.8	3.4
New Zealand	-4.8	2.7	2.6
Dynamic Asia**	-4.6	4.3	4.6
Asia & Pacific	-1.5	5.9	4.1
Rest of world	-5.7	3.2	3.4
World	-4.2	4.2	3.7

*Fiscal year starting in April

**Dynamic Asia includes Chinese Taipei, Hong Kong, Malaysia, Philippines, Singapore, Thailand and Vietnam

Source: OECD Economic Outlook, December 2020

CHINA - FIRST COUNTRY TO BOUNCE BACK

China takes victory lap over economic recovery to pre-coronavirus pandemic growth rates

- The Chinese economy officially grew by 2.3 per cent in 2020, crowning a remarkable recovery from extreme coronavirus lockdown conditions in the early part of the year



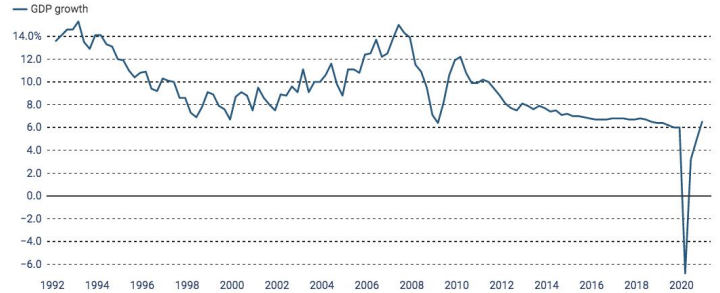
Finbarr Bermingham and Orange Wang
Published: 8:01pm, 18 Jan, 2021

[Why you can trust SCMP](#)



Source : SCMP (Jan 18, 2021)

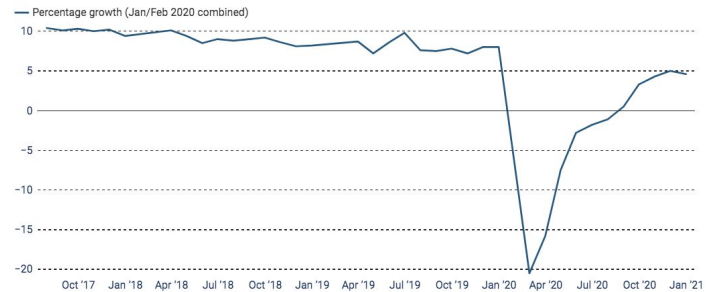
China's GDP growth, quarterly



Source: National Bureau of Statistics

SCMP

China's monthly retail sales



Source: National Bureau of Statistics

SCMP

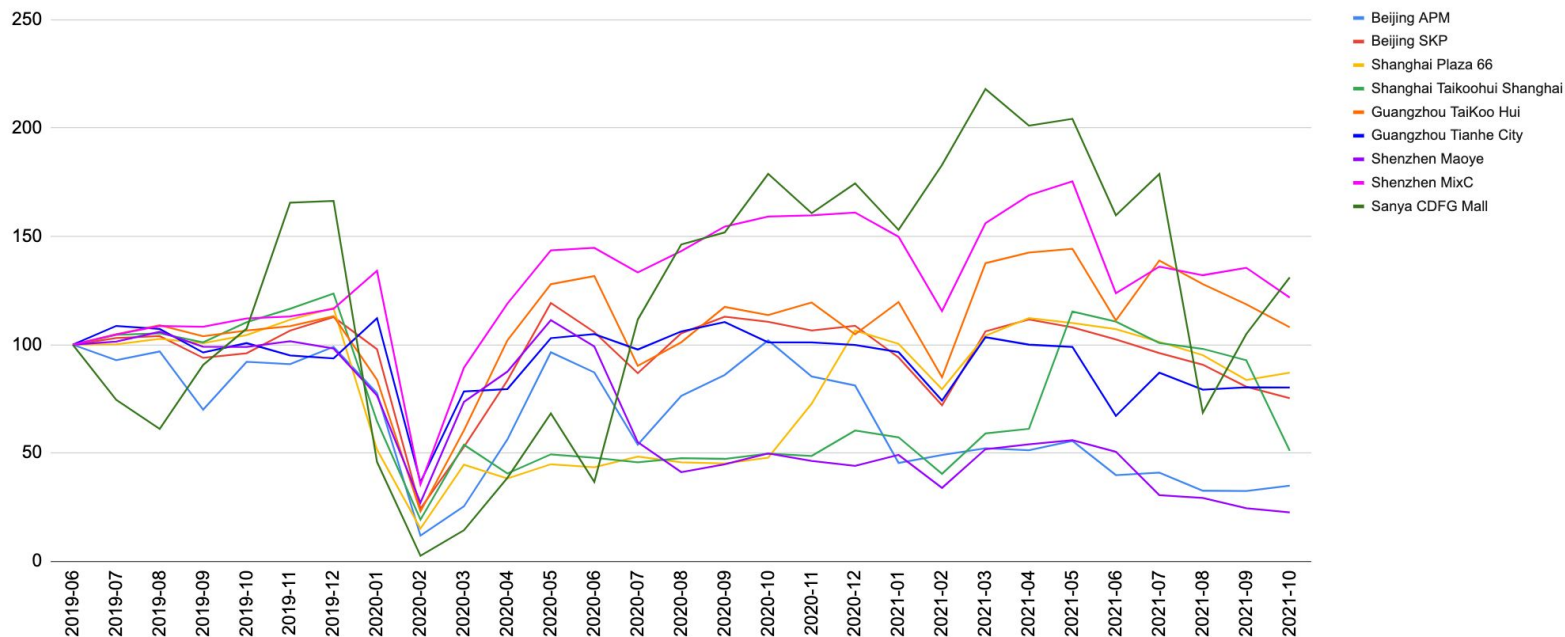
CHINESE GOVERNMENT POLICIES ON ARRIVALS

China Partially restricted

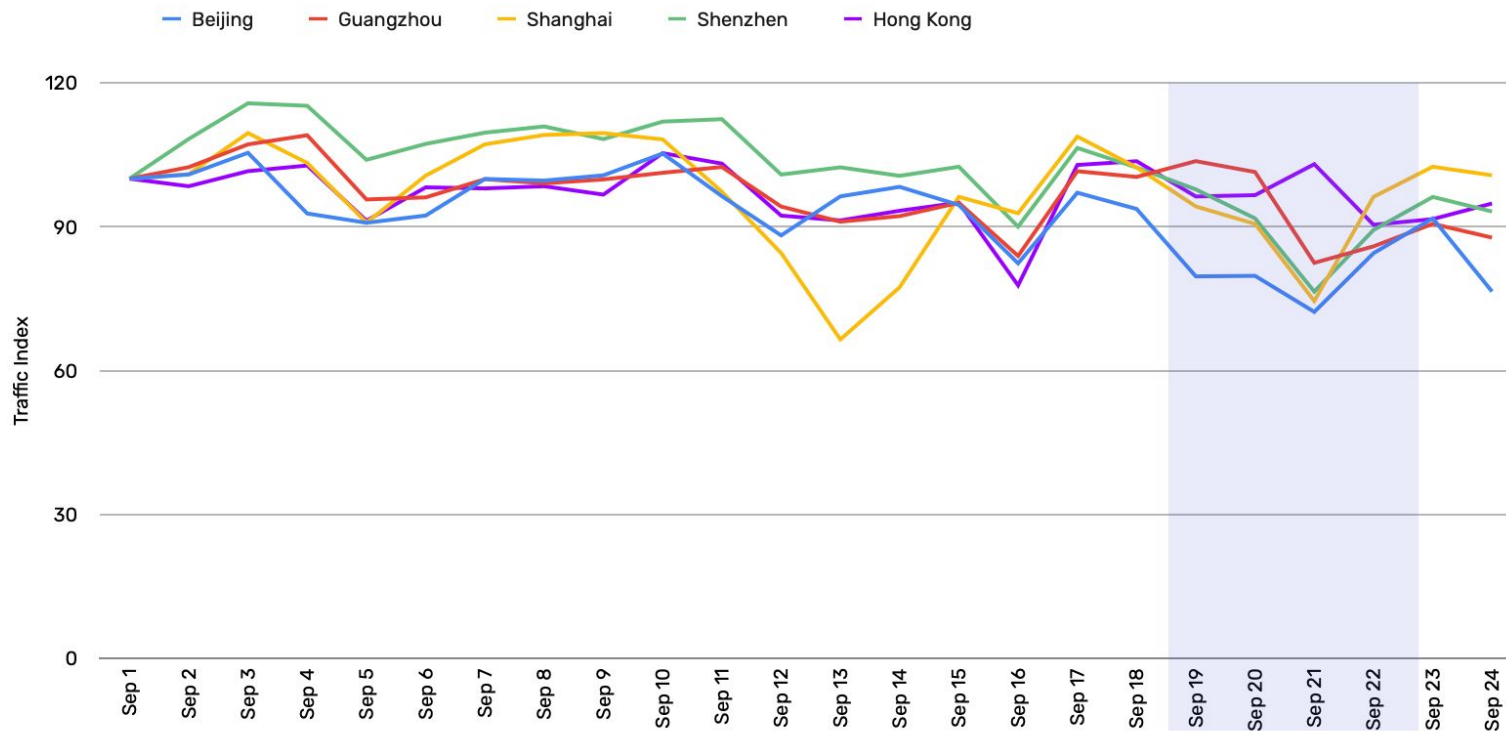
New COVID-19 Testing Requirements for Travel to Mainland China

From December 1, 2020, all persons (including Chinese nationals) traveling from abroad to destinations in Mainland China must have proof of dual negative results for COVID-19 using both a nucleic acid test and a serological test for IgM antibodies. Both tests must be performed no more than 48 hours prior to departure and results must be submitted for approval to a local Chinese embassy or consulate. Chinese nationals should upload results into their mobile Health QR Code app in order to obtain a "green" code containing an "HS" designation, which they must present to airline staff prior to boarding. Foreign nationals are advised to check with their local Chinese embassy or consulate for instructions on how to submit copies of their negative test results, their passport information page, and a signed health declaration form for inspection and verification. Foreign nationals from certain countries and regions will, upon verification of their information, receive a QR code containing an "HDC" designation, which they must present to airline staff prior to boarding. All travelers are advised to check with a local Chinese embassy or consulate in all jurisdictions they intend to pass through on their way to China in order to confirm testing and document verification requirements. Whenever possible, travelers are strongly encouraged to book direct flights to China in order to avoid complications with testing and document verification in connecting locations. Limited exemptions to this policy exist. All persons (including Chinese nationals) must undergo a 14-day quarantine at a designated location upon arrival in Mainland China. This policy includes an option for persons entering via Shanghai to undergo a 7-day quarantine in a designated location followed by 7 days of self-isolation at home. Foreign nationals instructed to upload their travel information electronically may do so via the following URL: <https://hrhk.cs.mfa.gov.cn/H5/>

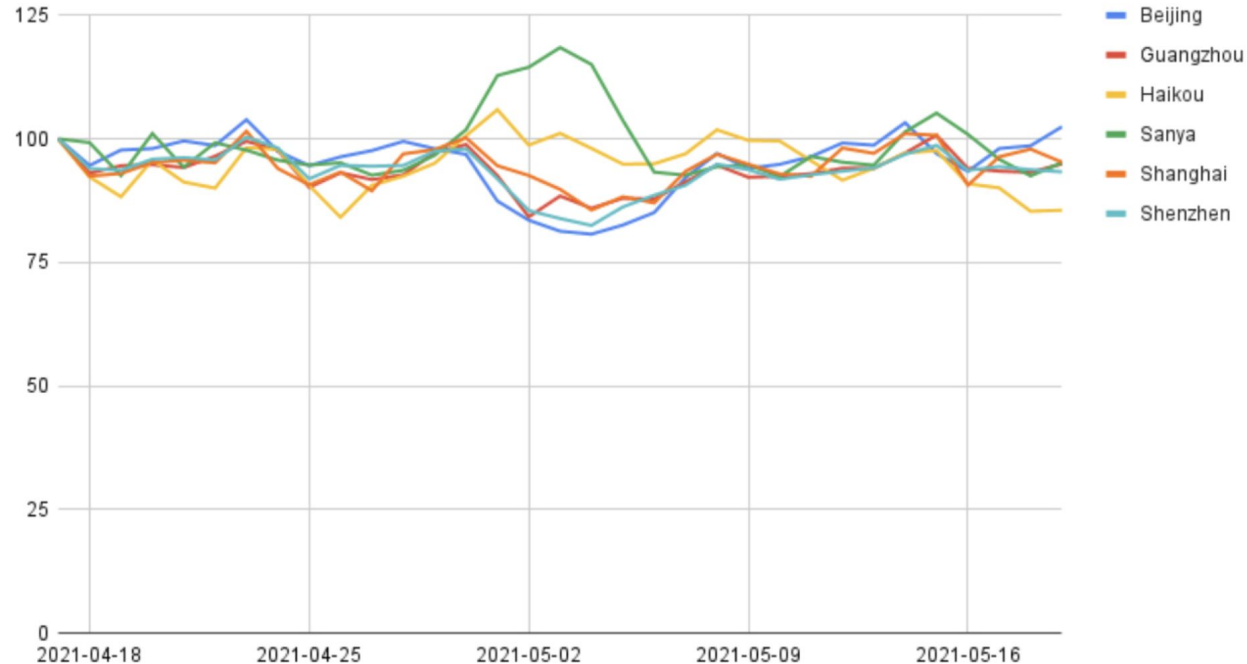
2020-2021 Footfall Trends in China Tier 1 Cities By Shopping Mall



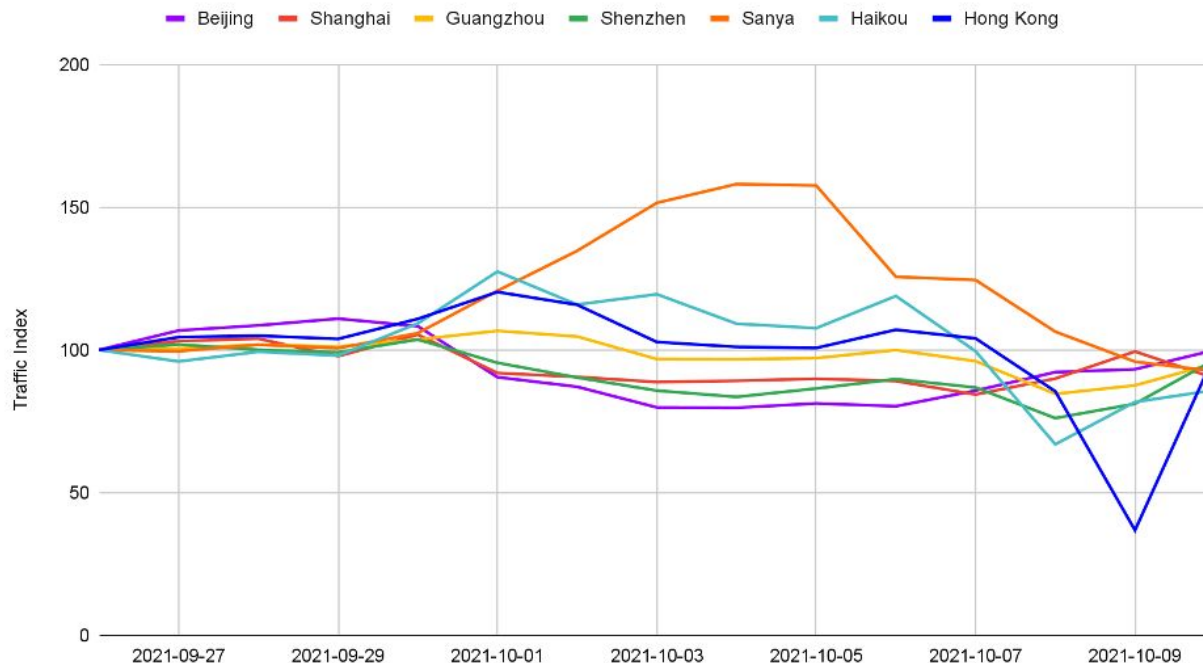
Mid-Autumn Festival Footfall Trends, Sept 2021



May Golden Week Foot Traffic Index Across Key Cities in China, Apr - May 2021

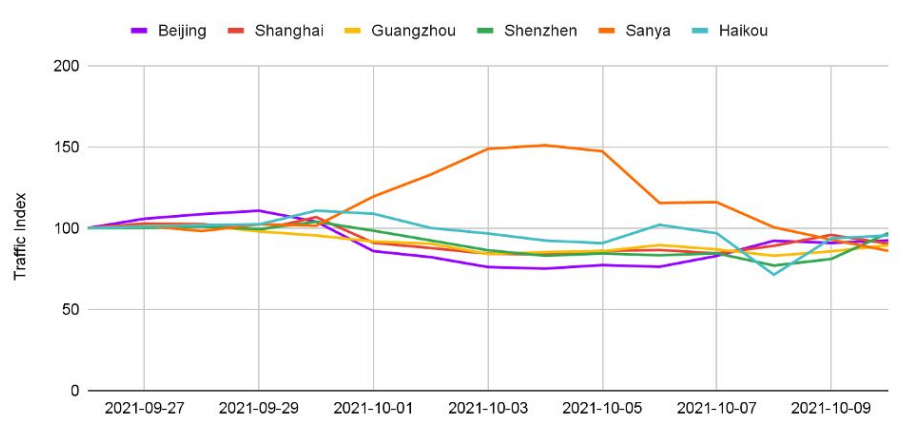


October Golden Week Foot Traffic Index Across Key Cities in China, Sep - Oct 2021

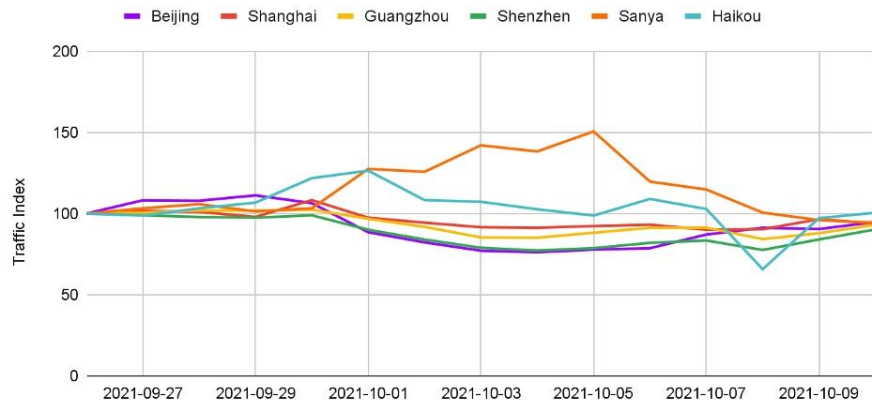


October Golden Week Foot Traffic Index Across Key Cities in China by Categories, Sep - Oct 2021

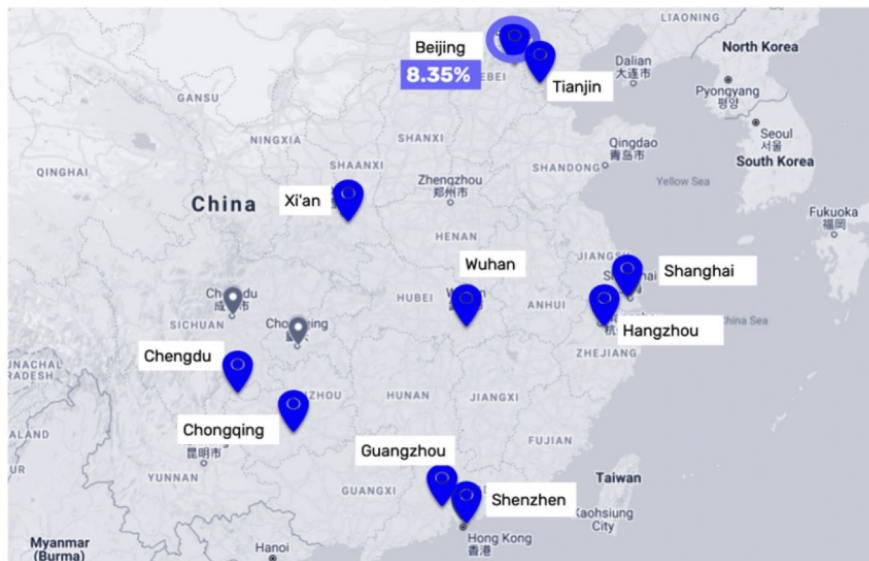
Luxury Footfall Trends



Beauty Footfall Trends



Chinese Cities that Sanya CDFG Mall Visitors Originate From



May 2021

Cities of origin	City Tier	% of traffic driven to CDG, Sanya
Beijing	Tier 1	8.35%
Shanghai	Tier 1	7.74%
Guangzhou	Tier 1	4.11%
Chongqing	New Tier 1	3.97%
Chengdu	New Tier 1	3.86%
Shenzhen	Tier 1	2.80%
Tianjin	New Tier 1	2.39%
Hangzhou	New Tier 1	2.39%
Xi'an	New Tier 1	2.25%
Wuhan	New Tier 1	2.16%
Other	-	59.98%
TOTAL		100%

What COVID has taught us?

POST COVID STRATEGY

The past global crisis taught us that strong resilience in the face of crises contributes to long-term growth.

Assuming that the pandemic is brought under control and that the large population is vaccinated and soon Asia & Pacific will confirm its new position as a global powerhouse.

Many Asian & Pacific economies are resilient in the face of shocks (though not all)

Asian Financial Crisis (1997-99)			
Sharp recession, slow exit & scarring	Recession, rapid exit & scarring	Mild recession & rapid exit	Muted impact of crisis
IDN, THA	HKG, KOR, MYS, SGP	JPN, NZL, PHL	AUS, CHN, IND, MNG, TWN, VNM
Global Financial Crisis (2008-09)			
Sharp recession & slow exit	Sharp Recession, rapid exit & scarring	Recession & rapid exit	Muted impact of crisis
JPN	HKG, SGP, TWN	KOR, MNG, MYS, NZL, PHL, THA	AUS, CHN, IDN, IND, VNM
COVID-19 Crisis (2020-21)			
Sharp recession, slow exit & scarring	Recession, slow exit & scarring	Recession, slow exit	Recession, swift exit
IDN, IND, PHL	AUS	CHN, HKG, JPN, MYS, TWN	KOR, MNG, NZL SGP, THA, VNM

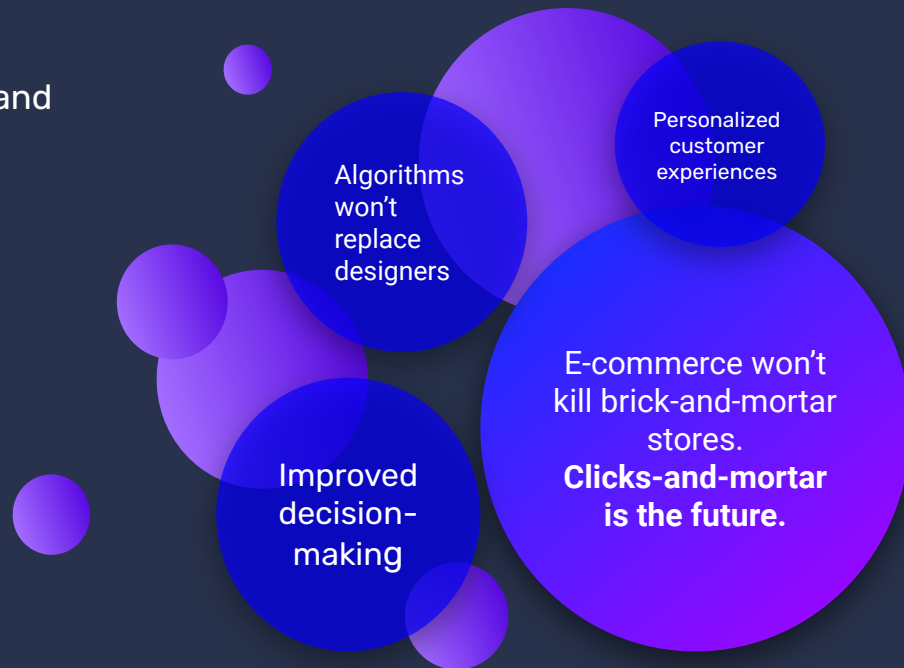
Rising resilience



Source: OECD estimates using a hierarchical cluster analysis procedure

OMNICHANNEL TRENDS 4.0

COVID-19 is a good opportunity for brands to rethink its retail strategy. Brands who change and embrace technology will be able to sustain growth and increase market share.



EMBRACE CLICKS-&-MORTAR

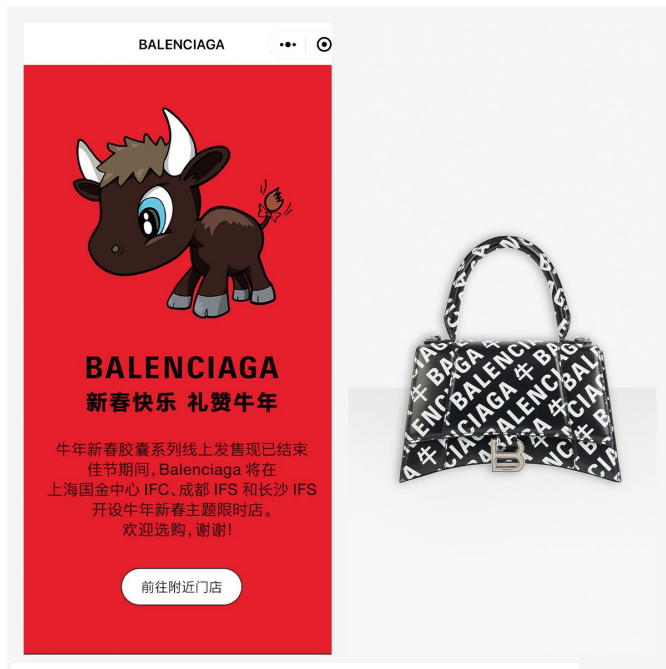
Brands accelerating digitization and e-commerce solutions: “see now, buy now” live streaming



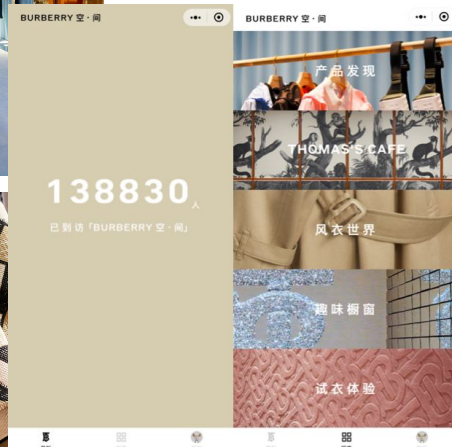
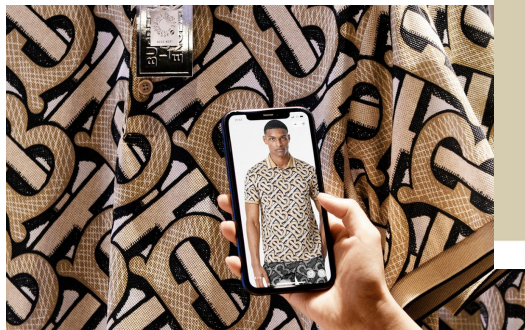
Chengdu IFS Celebrates 7th Anniversary



Chengdu IFS Celebrates 7th Anniversary



EMBRACE CLICKS-&-MORTAR



HIGH-PERFORMANCE SKINCARE BRAND

About

A globally renowned skincare brand believes that every woman can be beautiful.

Goal

This premium skincare brand wanted to show how this is attainable to shoppers in Sanya, China who are interested in beauty products.

Strategy

The brand targeted shoppers that recently visited theirs and competitors' stores pre-trip and those who had arrived in Sanya, Hainan for the 2020 October Golden Week holidays. With precise segmentation, engagement with mobile ads for this segment was measured and store traffic attributed for the brand to achieve their in-store goal.



Best Use of O2O Strategy, Digital Solution & Technology

About

The first retail museum in the world, K11 is a revolutionary hybrid of art and commerce, a seven storey complex spanning a floor area of 340,000 square feet.

Goal

A believer of real-world consumer insights, K11 wanted to look beyond online data to reach locals with high spending power amidst multiple waves of the pandemic affecting the HK economy.

Strategy

The mall went all out with their bidding strategy for audiences interested in, and relevant to the luxury segment such as residency and visits to high-end locations - including visits to their competitors. Coupled with CRM data, online campaigns across FB +IG engaged this segment during peak days for optimal performance.

- 98%
CPA for
offline
visits

HK\$2.1M
sales



Key Takeaways

KEY TAKEAWAYS



1 Segmentation and KYC are key to success especially if we want to reduce media wastage and be cost effective in our marketing \$\$

2 Top funnel first and always thinking about where and how your consumers behave.

3 Be creative and be daring enough to innovate your brand and try new things during COVID.

1 Pandemic has accelerated the changes in retail industry.

2 It is important to leverage rich data sources and technology for strategy development and targeted approaches.

3 Understanding the footfall pattern and the audience surrounding POIs is important to maximize your growth.

THE SOLUTION

Cosmose AI Understands, Predicts and Influences how 1B People Shop Offline

Seamless

No hardware and no installation

Accurate

1.6meters positioning accuracy confirmed by PwC

Everywhere

Ecosystem of 1B+ smartphones and 400K+ offline locations

HOW

Stand out with the best AI driven location technology, with no hardware installation.

Create a simple way for offline retailers to understand shoppers and increase sales

Provide insights ➡ **Cosmose Analytics**

Drive traffic ➡ **Cosmose Media**

SEE MORE ON:



TRACK PRE-VISIT
ONLINE



IDENTIFY POTENTIAL CONSUMERS DURING VISIT
OFFLINE



TARGET AD POST-STORE
ONLINE



MEASURE CONVERSION
ONLINE OR OFFLINE

OUR AI DRIVEN DATA PROVED TO DELIVER OUTSTANDING RESULTS

L'ORÉAL

Cosmose identified beauty lovers who frequently visited luxury malls and boutiques, as well as retargeting consumers who went to L'Oréal own stores & distributor stores without making purchases

Delivered 135% higher Offline Conversion and 43% lower Cost Per Offline Purchase than Tencent Advertising Tagging

Cartier

Cosmose predicted audiences who were interested in engagement rings (males who visited at least 2 jewellery stores in 1 week and are under 40yo) and wedding rings (females who visited bridal shops for the first time and didn't visit jewellery stores yet)

\$300K value of sales and 16% engagement rate.

K11

MARKIES AWARDS 2021

MOB-EX AWARDS 2021

Cosmose **helped K11 generate upwards of 100% footfall and performed better in overall mall sales** relative to other Hong Kong shopping malls during the pandemic

Won the 2021 MARKIES AWARDS Best Use of Technology and 2021 MOB-EX AWARDS Most Innovative Use of Mobile Technology.



cosmose AI

China's Travel Retail:

Trends & Predictions
for 2022

Thank you!
Get inspiration from
China's retail
landscape:

Cosmose.co

Questions?

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