

Delivering on O2O

How Chinese retailers can respond to the blurring of online and offline

June 2015



Survey Methodology

'Delivering on O2O' is a piece of thought leadership whose insights are primarily based on the PwC survey - Total Retail 2015: retailers and the age of disruption. In 2014, PwC administered a global survey to understand and compare consumer shopping behaviours and the use of different retail channels across 19 territories, with 19,068 online interviews conducted. For the full findings, please visit:



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Executive summary

If the impact of digital on Chinese retailing was limited to just eCommerce the challenges would be enough to keep most retailers more than occupied. If only that was the case. The explosive growth in China's digital market has come as technology has moved quickly to the centre of Chinese consumers' lives. For example, online now represents 10% of total retail sales up from just 2% in 2009. And with B2C eCommerce sales of \$440 billion, China has now surpassed the US as the world's largest eCommerce market¹. This rapid change is due to the converging trends of Chinese consumers as early adopters of new technology, and the successful commercialisation of multiple digital innovations by China's leading internet players.

With the lines between digital and physical becoming irrelevant for consumers, many retailers are looking to transform from a siloed channel approach to a seamlessly integrated retail model. One area to have gathered prominence in China is online-to-offline (O2O) retailing. At its most basic this involves using online channels to increase awareness and subsequently drive consumers into offline (physical) stores. O2O is drawing significant interest from China's leading internet firms with many making major investments in physical stores and distribution networks, offering the convenience of eCommerce with the instant gratification of bricks-and-mortar shopping. In March 2014, Alibaba invested roughly RMB 4.3bn in Intime Retail, a Chinese department store operator², and in August of the same year Tencent, Baidu and Wanda (China's biggest property owner) announced a RMB 5 billion joint venture to exploit O2O opportunities³. China's internet giants have already shaped the eCommerce retail environment and recent investments show that the physical retail model is also not immune from the digital disruption either. Time is rapidly running out for retailers and brands in China to respond to the emergence of O2O or risk becoming increasingly disintermediated by their innovative internet-based rivals.

The following report draws upon research from PwC's Total Retail Survey 2015 of 19,068 online shoppers from 19 different territories including 906 from China which asked consumers about their purchasing preferences, use of different shopping channels and expectations of retailers.

¹ Forrester, China Online Retail Forecast, 2014 To 2019 (February 2015)

² <http://www.reuters.com/article/2014/03/31/us-intime-alibaba-group-idUSBREA2U01K20140331>

³ <http://techcrunch.com/2014/08/28/tencent-baidu-and-wanda-form-814m-joint-venture-to-take-on-alibaba/>

Online-to-offline, blurring the lines of digital and physical

Online-to-offline (O2O) is fast emerging as one of the most important trends in Chinese retail, but in reality it is not a radical concept. However, the widespread adoption of new digital technologies like targeted advertising, mobile payments, location-based “beacons”, interactive displays, and mobile loyalty platforms create new opportunities for engagement. Today, Chinese consumers weave in and out of digital and physical channels – often simultaneously - and retailers need an O2O strategy that supports this complex customer journey. We’ve started to see a few pioneers lead the way in China, for example with select malls looking to deploy over 20,000 location beacons to track, engage and direct customers in a far more personalised way, or retailers providing integrated on/offline stock-checking, payment and delivery over their mobile web/app services. Yet these are still the exception rather than the rule.

We believe that retailers and brands need to align their retail model to reflect this new, non-linear, customer journey. Solving for just one element, like a social strategy or online payments, is not enough. Doing so might create single points of leading practice, but without an integrated platform retailers risk being left out entirely. Our O2O framework, covers four stages in the customer journey: Discovery, Experience, Transactions and Loyalty and has been designed at the intersection of consumer preferences and digital capabilities that reflect the reality of retailing in China today.

PwC’s digital customer journey in China



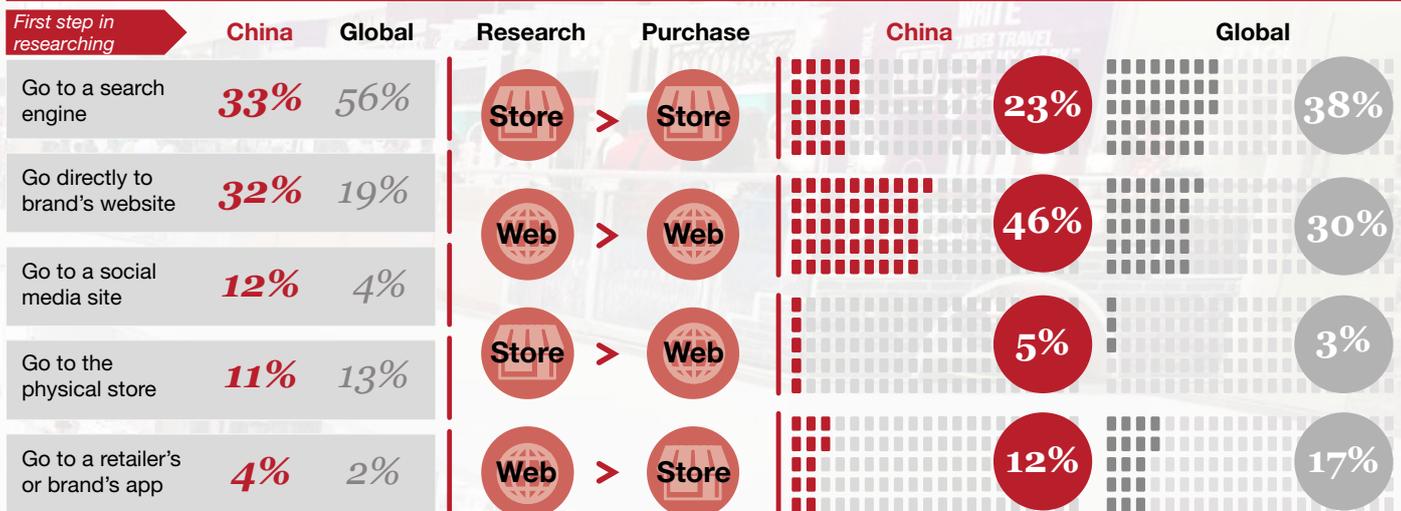




Discovery – from broadcasting to conversations

Digital has transformed the ability to interact with Chinese consumers, but it requires new discipline and capabilities in near real-time campaign management and creative content. Engagement options have changed from mass-market campaigns to deeper, more relationship based conversations across online, mobile and even interactive devices in an on premise environment. From a discovery perspective, PwC's research shows that digital channels have become the most important way to engage Chinese consumers. For example, 85% chose a digital channel as the first step in researching a new product and 58% of Chinese consumers stated that where they did make purchase, research was done online compared to just 47% globally.

Online has become the dominant engagement and transaction channel for Chinese consumers
China Cross-channel shopping behavior. Research to purchase.



Source: PwC, Total Retail Survey (2015)

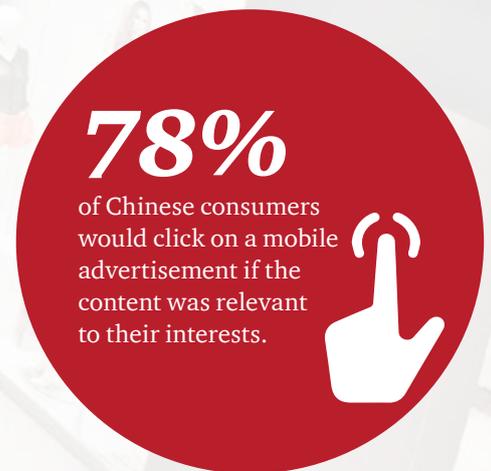
More than anywhere else, we see mobile and social technologies characterising what it means to be digital in China. With these channels influencing at least 50% of all retail spend in China it is unsurprising that retailers are being driven to invest where the customer is.

Mobile - always-on and always-with-you

PwC's Entertainment and Media Outlook 2014 confirms that Chinese consumers have adopted mobile as the dominant device to access the Internet. 2015 will be an inflection point in China, where consumer spend on mobile Internet access will exceed fixed broadband for the first time. When done well, mobile advertising targets the right person, in the right place, at the right time with the right offer. This contextually relevant scenario is also highly desirable and likely to turn

engagement into action. Research from a PwC's Mobile Advertising in China (2014) survey found that 78% of Chinese consumers would click on a mobile advertisement if the content was relevant to their interests.

What differentiates mobile advertising is location, and the majority of O2O innovation is in location-based services. In April 2014 Alibaba acquired AutoNavi, a mobile-mapping and navigation firm which Alibaba integrated with its eCommerce platform, allowing for more localized services such as directing users to the nearest physical shop. At a micro-level we also see many retailers using Bluetooth powered beacon technologies to support highly localised engagement based on where consumers might be with a store or even how they are interacting with a specific display.

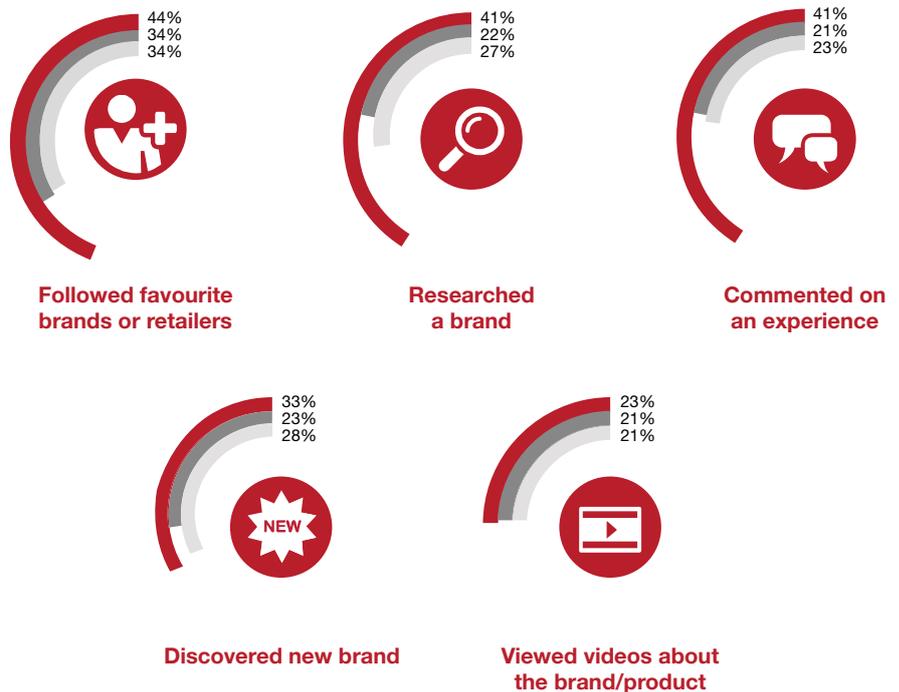




Social – much more than just likes

From simply a scale perspective it is impossible to ignore social media networks and platforms. As of December 2014, 6 of the world’s largest social media sites were Chinese. But much more significantly is the impact on purchase decision making. Our research reflects that no other country shows the same level of social media influence as China. This is particularly true for discovery where Chinese consumers are twice as likely as their US peers to research brands on social media in order to learn through other customer’s shared experiences. Finding effective ways to drive this engagement is therefore crucial. Tencent’s partnership with JD.com has positioned the online retailer as the default shopping choice within Tencent’s hugely popular WeChat app. The partnership aims to make social mobile commerce frictionless, with JD.com accepting WeChat Payment and automatically linking users’ delivery addresses.

Whether you are participating or not, there is a conversation happening about your brand in China
Which of the following have you done using social media?



■ China
■ US
■ Global average

Source: PwC, Total Retail Survey (2015)

It is unsurprising that many brands have made social a critical element of their retail model. PwC's research shows it can have a major top-line impact with 90% of Chinese consumers stating that online interactions with their favourite retailers have driven them to buy more. Interestingly while deals and promotions are important, they are less so in China than globally. Chinese consumers prefer a greater variety of types of brand interaction over social media, with emphasis on content related to product discovery and the ability to engage with other fans to share their experiences. A good example of a brand doing this is The North Face. When aiming to raise brand awareness in China they created an online community linking amateur mountaineers to relevant clubs. The site offered points for activity and loyalty that could be redeemed for products and now has a detailed database of over a million customers⁴.

Content portals: Deals, discovery and engagement

What attracts you to visit a particular brand's social media page?

	China	Global	
Deals	41%	45%	attractive deals/ promotion/sales
Discovery	40%	33%	interested in new product offerings
	23%	24%	to research products on social media before I buy them
Engagement	28%	24%	friend's or expert's recommendation
	20%	11%	interested in interacting with the brand or its online followers
	20%	12%	had a good or bad experience and wanted to provide feedback

Source: PwC, Total Retail Survey (2015)



90%

of Chinese consumers users say interactions with their favorite brands on social media have driven them to buy more



But what interactions do they want?

⁴ The Economist "Chinese consumers doing it their way" (2014)

Experience – giving the bricks clicks

The near ubiquitous nature of the smartphone in Tier 1 – 4 cities has seen Chinese consumers’ leap-frog the Western eCommerce model and shift to a mobile-first retail environment. This rapid shift has created a significant challenge for traditional retailers who are experiencing the issue of their expensive stores being used as ‘showrooms’. Our research shows that while this is a global challenge it is more acute in China, with 86% of respondents stating they had intentionally browsed products at a store before deciding to purchase it online, citing lower prices as the key driver.

“Showrooming” a global reality and a Chinese norm

Have you ever intentionally browsed products at a store but decided to purchase them online?



China



Global

China Global

91% 85%

Better prices online

China Global

83% 71%

I wanted to see/touch/try the merchandise

China Global

63% 45%

It is more convenient to have the item delivered

“Web rooming”, is your brand site also become a showroom of sorts?

Have you ever intentionally browsed products online but decided to purchase them in-store?



China



Global

China Global

50% 54%

To avoid paying for delivery

China Global

73% 62%

I wanted to see/touch/try the merchandise

China Global

56% 54%

It is more convenient to have the item immediately

Source: PwC, Total Retail Survey (2015)



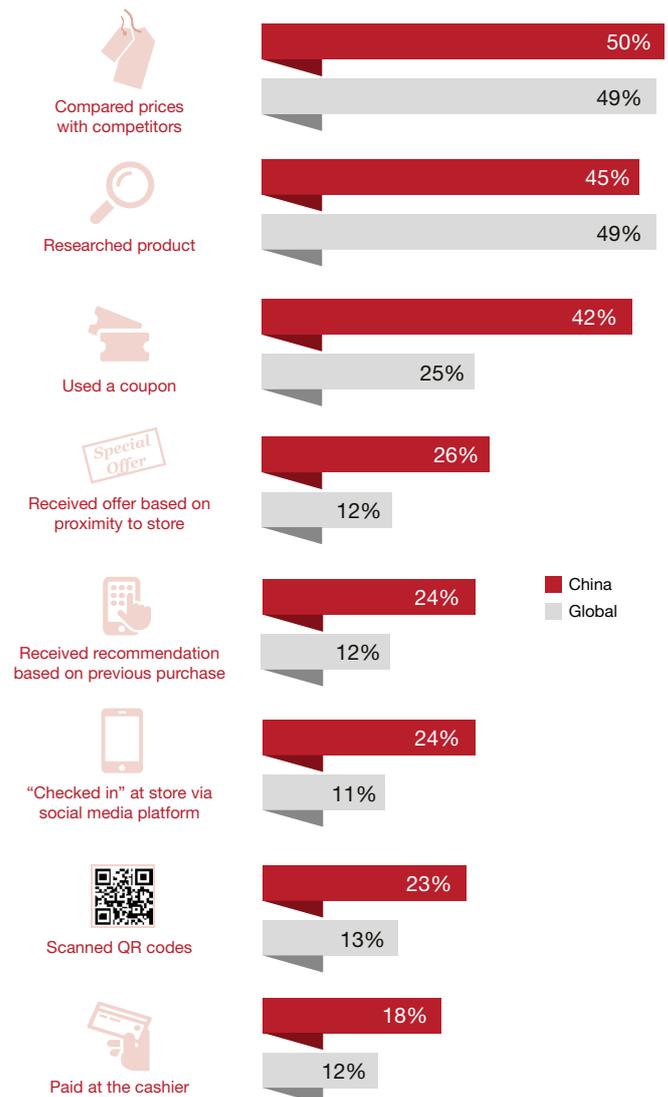


Blurring the lines between physical and digital to delight customers

Chinese bricks-and mortar retailers have certainly bore the brunt of the rise of eCommerce, but the role of the store remains a crucial element of omni-channel retail. It is one that must evolve to fit with Chinese consumers’ mobile-first retail habits. The store of the future will ‘connect’ the dots through technology to offer a far superior experience - anticipating and surpassing customer needs⁵.

PwC’s research shows that 60% of Chinese consumers shop in-store because they get to touch, feel and try the merchandise – the most important attribute surveyed. The experiential strength of the physical channel through visual merchandising, customer service and ambiance cannot be matched in a purely online environment. But this is not an either/or equation. The opportunity from mobile actually comes from enhancing – not replacing – the physical environment. While globally many retailers have been experimenting with in-store digital technologies, our research shows that Chinese consumers actually display the highest preferences to engage with them compared to Global averages.

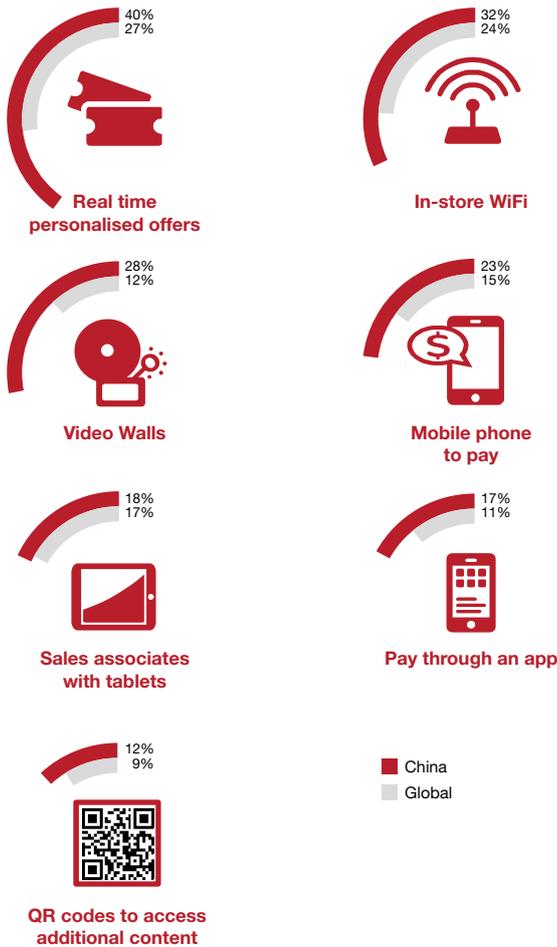
Chinese consumers are more likely to engage with retailers digitally across a wider variety of use cases than their global peers
Which of the following have you done using your mobile/ smartphone/tablet/PC?



Source: PwC, Total Retail Survey (2015)

⁵ PwC “connected and curated, long live the store” (2014)

Globally many retailers are experimenting with in-store digital engagement but Chinese consumers show the highest preferences to engage. Which of the following in-store technologies would make your shopping experience better?



Source: PwC, Total Retail Survey (2015)

Chinese consumers' preference for real-time personalised offers was first highlighted in our previous research on Mobile Advertising in China (2014) and the trend is reinforced here. Often the best way to achieve this is through geo-location technologies. The personalisation of offers can take many forms including digital coupons, exclusive branded content, or social media contests, but they share the same characteristics of being hyper-targeted and designed to drive a specific action. In September 2014, Baidu launched its 'Baidu Connect' service that uses location-based technology and integration with the Baidu Map product to allow brands to attract potential customers via promotions displayed on their smartphone⁶. Early adopters have already experienced success, such as Haidilao Hot Pot, a restaurant chain, reported to have 700,000 website hits since its launch⁷.

The use of video walls also stands out as being highly desired; our research showed Chinese consumers were four times more likely than their US peers to describe these technologies as improving their in-store experience. The opportunities from using video to create immersive in-store experiences are enormous, for example, to reinforce current advertising campaigns or sponsored events. Lane Crawford's 'Future: Play' campaign did this by turning its Shanghai flagship store into a futuristic arcade that allowed customers to view exclusive videos on their smartphones while shopping⁸.

While each of these technologies holds promise individually, the best Chinese retailers are looking to design digitally-enabled experiences that are aligned with the entire customer journey from discovery to fulfilment. In October 2014, Topshop took a unique – mobile first – approach to launching in China. The company partnered with ShangPing.com, a multi-brand fashion eCommerce site, and The Place Mall in Beijing. Dubbed 'The Mobile Adventure', shoppers scanned QR codes around the mall to virtually select outfits, share the looks on social media and order items for next-day delivery⁹.

⁶ Reuters "Baid boosts location-based platform with new services, \$10 million investment" (2014)

⁷ China Daily "Baidu speeds up online commerce" (2014)

⁸ Red Luxury "The rise of omni-channel retailing" (2015)

⁹ Red Luxury "The rise of omni-channel retailing" (2015)



Transact – closing the loop

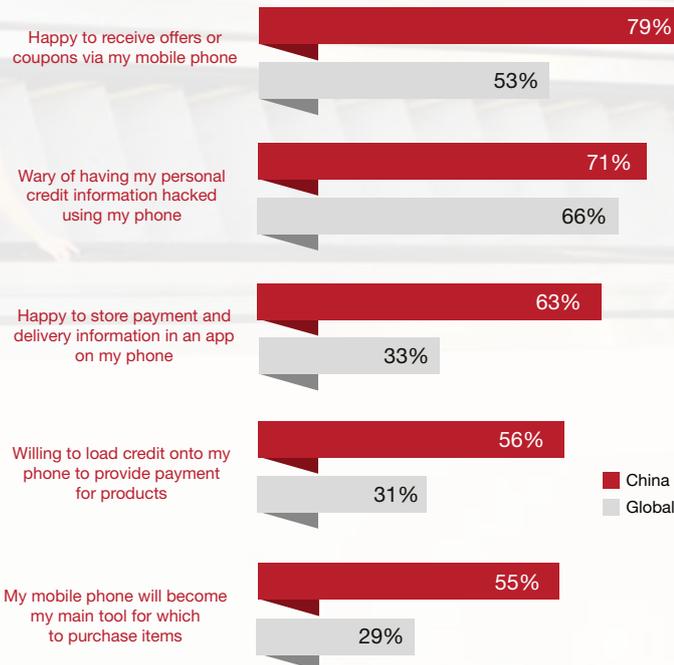
The ability to follow the consumer through the purchase funnel from awareness to transaction has always been the ambition of marketers. Doing so allows brands and retailers to ‘close the loop’ on marketing investment and understand the true ROI on customer acquisition or retention. In a purely digital world, tracking technologies make this possible, if not always perfect. In a multi-channel environment this is much more challenging. Mobile payments (mPayments) or wallets (mWallets) are often cited as one remedy to this and China stands out as arguably the leading nation for mobile as a payment mechanism. Internet payment platforms like Alibaba’s Alipay and Tencent’s TenPay have been widely adopted by users in China due to high levels of trust with the solutions and the wide ranging applications available. In 2014, 54% of all Alipay transactions were over mobile¹⁰. It is the ability to use these mobile payment services at a retailers’ physical point of sale (through technologies like NFC, QR codes or sound wave) that makes O2O such a powerful retailing model. For the first time, brands and retailers can close the loop between their online marketing investments and in-store transactions.

¹⁰ Alipay, December 2014



Despite share global security concerns, Chinese consumers are much more willing to use mPayments or store data on their phone

Please indicate how strongly you agree or disagree with the following statements?



Source: PwC, Total Retail Survey (2015)

Experiences from the launch of mobile payment platforms have found that a lack of consumer trust is often the most important challenge to overcome. Our research shows that despite sharing global security concerns, Chinese consumers are much more willing to use mPayments than global peers. 63% are willing to store private payment and delivery information in an app on their mobile, over double the response rate of US consumers, and 55% of Chinese consumers say they expect their mobile to become the main tool for purchasing items.

Much more than just payments

While the importance of mobile as a payment mechanism cannot be mistaken, focusing on just the transaction misses the broader opportunity. A successful mPayments solution should also improve the shopping experience. This could mean integrating the payment process with existing customer profiles, loyalty options or digital couponing. Doing so allows retailers to extend the usefulness of their branded apps to become multi-functional “mobile wallets”. Yonghui Supermarket’s mobile app is one example of this. Customers can use the app to shop by scanning the QR codes on product tags in-store which are automatically added to their shopping basket. They are then able to complete the payment process via their mobile and have orders delivered to their homes or picked up in-store¹¹. Another retailer to have taken a broader perspective is Suning, a national ‘big box retailer’. Their Yifubao wallet combines traditional shopping, ticketing and bill-payment functionality with online finance and investment products¹². In this way the retailer uses direct-to-engagement as a channel to deepen their customer relationship and expand their share of wallet.

¹¹ Fung Business Intelligence Centre, “Ten Highlights of China’s Commercial Sector” (2015)

¹² Forrester, “Understanding Digital Wallet Options For Your Business In China” (2014)

Loyalty

From commoditised coupons to differentiated experiences

The key to a successful O2O proposition is having regular multi-channel interaction with consumers whilst also building a rich profile on who those consumers are. Mobile is the only platform that remains consistent in nearly every customer journey and for this reason, many Chinese retailers are making mobile loyalty programs the center piece of their O2O strategy.

When most retailers think of mobile loyalty their immediate reaction is to digitize their print-based coupon schemes. For the most part this response is unsurprising, our Mobile Advertising in China (2014) survey found that 79% of Chinese consumers stated they were happy to receive offers or coupons via their mobile phone.

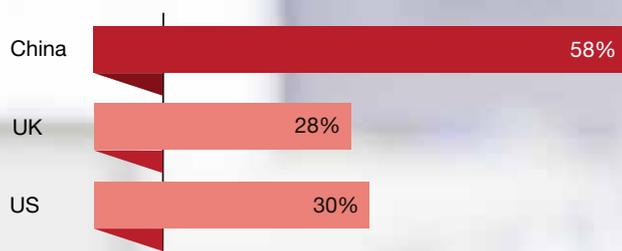
Creating a successful digital loyalty program is very different from traditional schemes however. At their best they should support continuous engagement and offer benefits relative to the value of the customer. Shangpin.com has been able to build a loyalty base of over 5 million Chinese consumers by doing just this. The company offers 4 levels of membership and associated benefits which are tiered to consumer spend. The effectiveness of Shangpin's loyalty program and focus on customer service means the company now enjoys a 70% return in repeat customers¹³.



¹³ JingDaily "How ShangPin plans to win big in China's eCommerce market" (2013)

Although Chinese consumers want a good deal it's not as important as service differentiators. A Nielsen survey found that nearly two-thirds of Chinese respondents thought enhanced customer service was the most valuable loyalty program benefit, while discounts mattered most among globally¹⁴. This offers Chinese retailers the opportunity to move away from price competition and begin differentiating based on personalisation or offering experiential rewards. For example, Genki Sushi's highly successful mobile loyalty program offers a variety of non-monetary benefits including: virtual mobile queuing, exclusive members-only menus and access to gourmet events. In the fashion sector, ImagineX's ICARD membership offers high-touch non-monetary benefits like personal stylists, free alterations, and access to personal shopping.

Chinese consumers are willing to share their data for exchange of value
Willingness to share personal data for a free app?

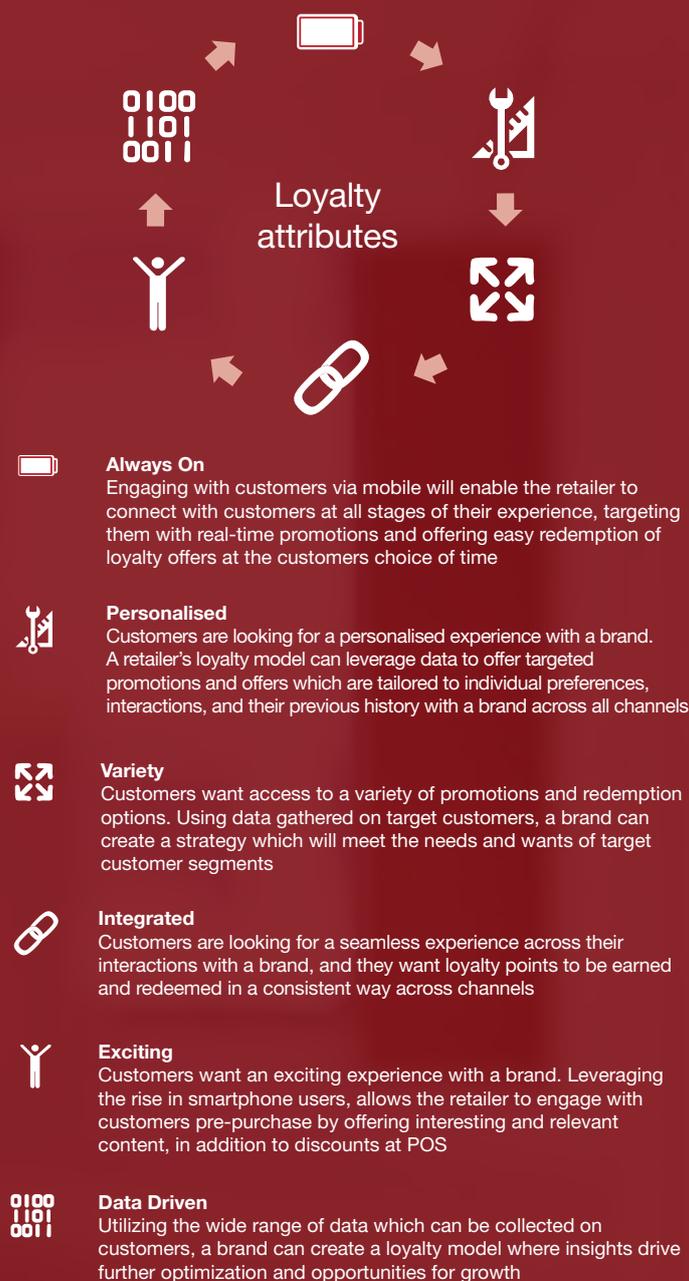


Source: PwC "Mobile advertising: What do Chinese consumers want?" (2014)

In order to drive truly incremental value from mobile loyalty programs, retailers should aim to exploit opportunities to use mobile as a mechanism to improve customer insights. One easy and highly effective way is actually at the point of download. Our research shows that Chinese consumers are far more willing to share personal data to get a free app so long as there is a fair value exchange. Self-disclosed and identifiable personal data can be used to create unique user profiles which can be tracked across multiple touch-points.

This data can also be used to personalise promotions like offering special deals to celebrate birthdays, as done by JD.com and UA Cinemas, are especially popular in China.

7 pillars of mobile loyalty in China



¹⁴ Nielsen (2013)

Recommendations

Chinese consumers have quickly embraced the convenience, accessibility and transparency of digital shopping and expect a seamless experience between the physical stores, websites and mobile applications of their favourite retailers and brands. And if satisfying consumer expectations wasn't enough, China's largest internet players are already investing heavily in physical infrastructure to dominate offline retail the same way they have done online. Throughout this report we have structured the changing landscape of Chinese retail around the customer, not the technology, and we think retailers need to respond in the same way. While responding effectively to this new reality will be complex, below we provide answers to some of the five most common questions we see from retailers in China.

“What eCommerce marketplaces choices do I have, is it only Tmall?”

Tmall, JD.com and other popular third party sites offer benefits such as access to huge traffic volumes, perfect for those brands looking to raise awareness in China. However while sales can be between 3-5 times higher than alternative B2C consumer sites, this comes at the cost of high commissions with many product categories falling into the 5% category¹⁵.

We recommend retailers evaluate a range of marketplaces in China including category- specific options like jumei.com for beauty, yhd.com for groceries and vancl.com or vip.com for men's and women's clothing respectively. Brand.cn sites are also an important part of your portfolio particularly as part of any omni-channel strategy that seeks to cultivate direct-to-consumer engagement through loyalty. eCommerce channels are not mutually exclusive and we recommend retailers constantly assess – and respond – to how each channel is performing based on their objectives.



“More traffic and sales are now coming from mobile what should I do, is an app build enough?”

Our 18th Annual CEO Survey (2015) found that 81% of Chinese CEO's said mobile technology was highly important for customer engagement. Despite this recognition we see many retailers in China are still prioritising low-cost execution of an “app build” versus a more strategic approach to how the technology can be used to improve customer experience across the business.

This is particularly important for international brands looking to grow in China. Chinese consumers have very different mobile habits to Western peers and have experience with completely different platforms. Researching local preferences and behaviours through targeted social listening, ethnographic research and persona design is crucial. International Hotels Group spent more than six months conducting qualitative research in five cities with 40 users to understand localisation issues¹⁶. Once the mobile-site or app is built doesn't mean the work is done. The leading technology firms work in a state of ‘constant beta’ regularly testing and optimising performance based on customer feedback, and we think retailers should do the same.



¹⁵ Forrester “Five Global Marketplaces All Brands Must Know” (2014)

¹⁶ Forrester “Best Practices For Chinese Mobile User Experience” (2014)

“Mobile payments are booming in China but how can I benefit most out from this trend?”



Mobile payments offer enormous opportunity but retailers should focus on how they can improve the entire customer experience, not just replace cash. The most popular solutions today, WeChat Payment and Alipay, offer a variety of value added services which provide a great deal of flexibility for both consumers and retailers. Of all the non-cash features, integrating loyalty into the mobile wallet is the most important.

For Chinese retailers to get the maximum benefit from mobile wallets they need a solution that can be used across offline and online. Compatibility with the POS is crucial to facilitate in-person proximity payments. Although the integration of NFC or 2d code payments is costly, the investment should be considered with a business case that includes increased shopper frequency, spending and consumer loyalty.

“What in-store technologies should I choose, and how can I justify their investment?”



Before starting with the technology, retailers should first identify what part of the customer experience they are trying to improve or point of friction they want to remove. In-store technology should be treated like any other investment case with benefits tied back to explicit changes in consumer behaviour like increased basket size or reducing queue time.

That being said, the quickest way to kill creativity is for someone to say “prove it first”. Some in-store technologies are bound to fail, but it must happen fast. We recommend retailers adopt a ‘test and learn’ agenda where they use pilots, principally in flag-ship stores, before wider roll-out.

“Omni-channel makes perfect sense for my consumers, but my organisation is still structured by channel.



What needs to change?”

90% of total retail sales in China come through offline channels but considering the point of transaction misses the influences on the path to purchase. Our research shows that 85% of Chinese consumers also choose online channels as the very first step in researching purchases. Most Chinese retailers face the same challenge; they want a channel neutral consumer proposition but are still organised and incentivised internally around offline and online performance.

Cross-channel attribution – where value is assigned to all consumer touch points for their relative role in the purchase – offers one solution. Our experience shows that while gathering and codifying data and building a technology solution with a data warehouse and an attribution engine are crucial, they are not the total answer. Retailers also need to embrace a cultural mind shift; organising around the customer, not the channel. Getting this right is not easy but remedies include: senior Customer-focused leadership from a Chief Customer Officer, the introduction metrics that focus on ROI or customer lifetime value, and, processes that encourage employees to engage with consumers in a channel agnostic way.

Our digital consulting experience in Asia Pacific

Combining business consulting experience and creative design capabilities to allow clients to define and execute digital opportunities

PwC has a network of firm across Asia Pacific serving clients from 70 locations and a further of 140 countries around the world. With over a staff strength of 33,000 in Asia Pacific aligned with functional expertise and industry sector to provide broad and deep capabilities from strategy through to execution. We complement our business consulting expertise with a multi-disciplinary digital services team that includes: digital strategists, customer experience experts, data scientists, UX designers and mobile developers. This combined capability allows us to help clients exploit the potential of digital to transform both what they do and how they do it.

What makes us different

We can deliver from strategy to execution



Strategy

Maximising business value



Innovation

Moving into whitespace



Design

Creating superior user engagement



Technology

Objectively viewing the connected world



Analytics

Identifying insights that matter



Activation & Optimisation

Locking in business value

Together we have over 250 specialists in China and Hong Kong

Strategy consulting

The acquisition of Booz & Company (now Strategy&) provides us with a leading global strategy house with extensive China strategy experience and strengthens our expertise across digital disruption and eCommerce

Digital, Customer and Analytics

A multi-disciplined team that includes: digital strategists, customer experience experts and data scientists that combine the business consulting experience PwC is well known for with the creative capabilities of an agency

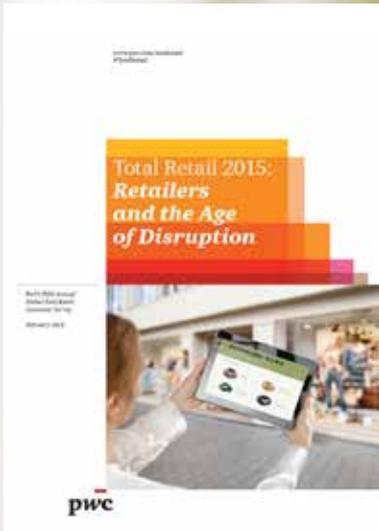
Creative and Branding Services

Our partnership with a strategic brand solutions agency with a broad service offers within: design and creative, brand / marketing strategy, social media campaigns and analytics, coding, user experience design and digital marketing

Technology Consulting

Our Technology Consulting team and Shanghai-based Technology Delivery Centre provides the ability to scaled development and implementation capabilities with bi-lingual technical specialists

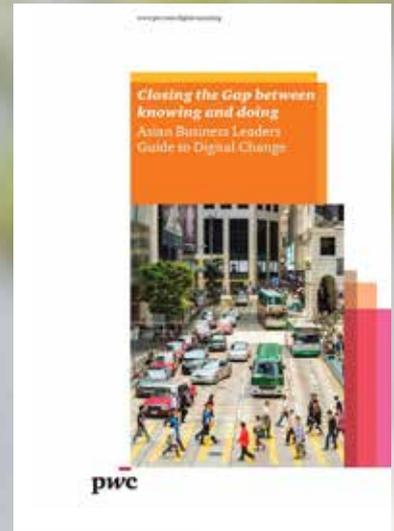
Our latest thoughts



Total Retail 2015: Retailers and the age of disruption



PwC 18th Annual Global CEO Survey – China insights



Responding to digital change – closing the gap between knowing and doing



2015-16 outlook for the retail and consumer products sector in Asia



Three surprising digital bets for 2015



Insurance 2020: the digital prize – taking customer connection to a new level



If you would like to continue the conversation, please contact our team



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