

# Impact Korea 2010

비즈니스 및 IT 리더를 위한 최고의 컨퍼런스



모바일을 이용한 전자상거래 어떻게 준비할 것인가

Delivering a Seamless Customer Experience via Mobile Web

Yvonne Loh  
Asia Pacific Sales Leader  
WebSphere Commerce

Discover. Interact. Optimize.



# Agenda

- Market Trends & Mobile Penetration
- WebSphere Mobile Commerce Store
- Looking Forward & Recommendations

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There are approx. **4.6 Billion** mobile phones worldwide

The total number of **mobile web users** grew past the total number of **desktop internet users** for the first time in 2008.



China Mobile has 500+ million mobile phone subscribers



Korea has 23.5+ million mobile users (pop. 48M) – > 4mil Smart phone users, 17% of mobile

*Mobile payments are predicted to generate approx. \$22 billion of transactions by 2011*

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**2 trillion** mobile messages are sent daily

... that is **285 times the total population of the planet** (~ 7 billion)



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An estimated **1.7+ billion people** – 25% of the world's population – are online

...a **380% increase** from the year 2000!



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# Mobile Phone Users in The World

[guardian.co.uk](http://guardian.co.uk)

## Half world's population 'will have mobile phone by end of year'

United Nations communications chief says booming market in developing countries will see global usage pass 50%

**Richard Wray**

[guardian.co.uk](http://guardian.co.uk), Friday 26 September 2008 09.32 BST

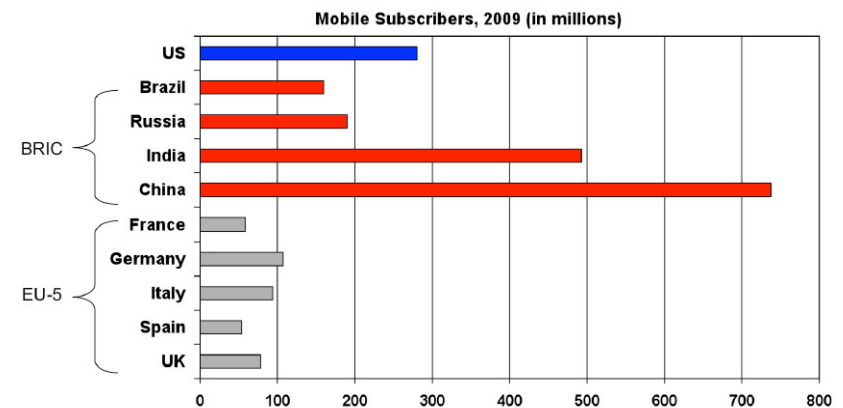
[A larger](#) | [smaller](#)



Japanese commuters while away the journey by watching TV on their mobiles.  
Photograph: David Sacks/Getty

The world's love affair with the mobile phone shows no sign of abating, with the head of the UN's agency for information and communication technologies predicting that there will be 4 billion mobile phone users - or more than half of the planet's estimated 6.7 billion inhabitants - by the end of this year.

- 3x times the number of mobile phones than PCs
- 2x times the number of mobile phones than credit cards
- 2x times the number of mobile phones than TVs
- Growing at the twice the rate of PC's
- Doubling every year for the past 2-3 years in Asia & Africa
- 2/3 of the worlds population live near mobile phone networks



Source: eMarketer, 9/09; ANATEL, 8/09; Citi Investment Research, 12/08; Frost & Sullivan, 9/09 IDATE, 2/09; J'Son & Partners, 3/09

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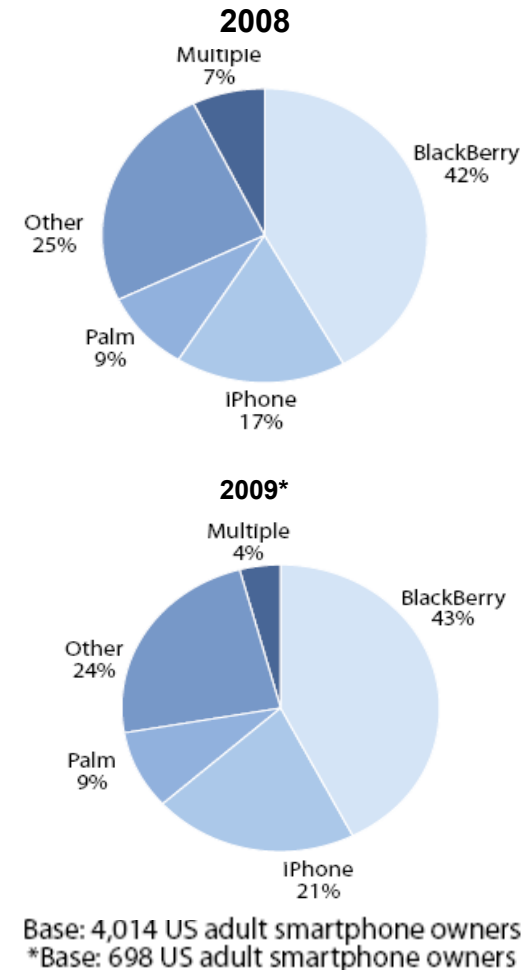
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# Smartphone Market Penetration

- Apple and the iPhone have educated consumers about value of mobile Web & wireless data
- Apple App Store has re-invigorated developers' interest in mobile as a platform
- RIM's leading share of the US smartphone market remains unchanged
  - While Apple's share grew at 23% rate in 2009 to account for 21% of the market, BlackBerry still has twice Apple's share
  - Blackberry holding its market share by offering diverse range of products, form factors, and multiple carriers



Source: Forrester. 2009: The Year Of High-End Phones. Jan 14, 2010

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# Worldwide Mobile Shopping Activities

- In December 2009, more than 1/2 Internet users worldwide use a mobile device as part of their shopping activities
- GenY was ahead on every measure of mobile shopping activity
  - GenY were 6.5 times more likely to get coupons via mobile than baby boomers
  - Gen Y were more than 3 times as likely to have made a mobile purchase over the past two weeks
- Mobile shopping habits differ greatly by region, with Asia-Pacific ahead
  - 23% people in AP have made a purchase using their mobile

Source: eMarketer "Mobile Shopping Takes Hold Worldwide." January 20, 2010

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### Internet Users Worldwide Who Have Used a Mobile Phone for In-Store Shopping Activities, by Generation, December 2009 (% of respondents)

Generation Y	64.0%
Generation X	50.1%
Baby boomers	33.2%
Total	51.4%

Note: in the past two weeks

Source: Motorola, "2009 Retail Holiday Season Shopper Study" conducted by e-Rewards and TNS International, January 2010

110615

www.eMarketer.com

### In-Store Mobile Shopping Activities of Internet Users Worldwide, by Region, December 2009 (% of respondents)

	Asia-Pacific	Europe	Latin America	North America	Worldwide
Called to ask someone about a product I might purchase	51.6%	28.2%	40.8%	26.2%	30.8%
Texted to ask someone about a product I might purchase	37.7%	20.0%	28.8%	17.3%	21.3%
Sent a picture of a product I might purchase	29.3%	14.0%	20.9%	14.1%	16.3%
Used mobile phone to access Internet to look at product reviews or other product information	35.9%	12.2%	15.7%	11.0%	14.3%
Used mobile phone to access Internet to compare prices	34.5%	11.5%	20.7%	10.4%	14.2%
Used mobile phone to access Internet to get coupons or special offers while shopping	28.0%	6.8%	10.5%	5.3%	8.5%
Made an Internet purchase directly on the mobile phone	23.0%	7.0%	8.5%	3.5%	6.9%
<b>Used mobile phone for at least one of the above shopping-related activities</b>	<b>78.0%</b>	<b>49.4%</b>	<b>62.4%</b>	<b>45.1%</b>	<b>51.4%</b>

Note: in the past two weeks

Source: Motorola, "2009 Retail Holiday Season Shopper Study" conducted by e-Rewards and TNS International, January 2010

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www.eMarketer.com

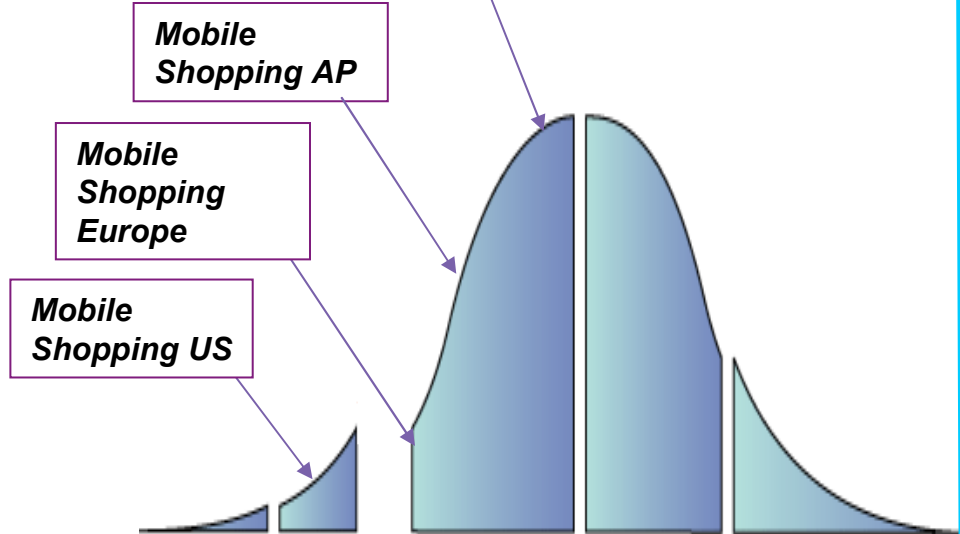




# Mobile Commerce Market Maturity Model: Today

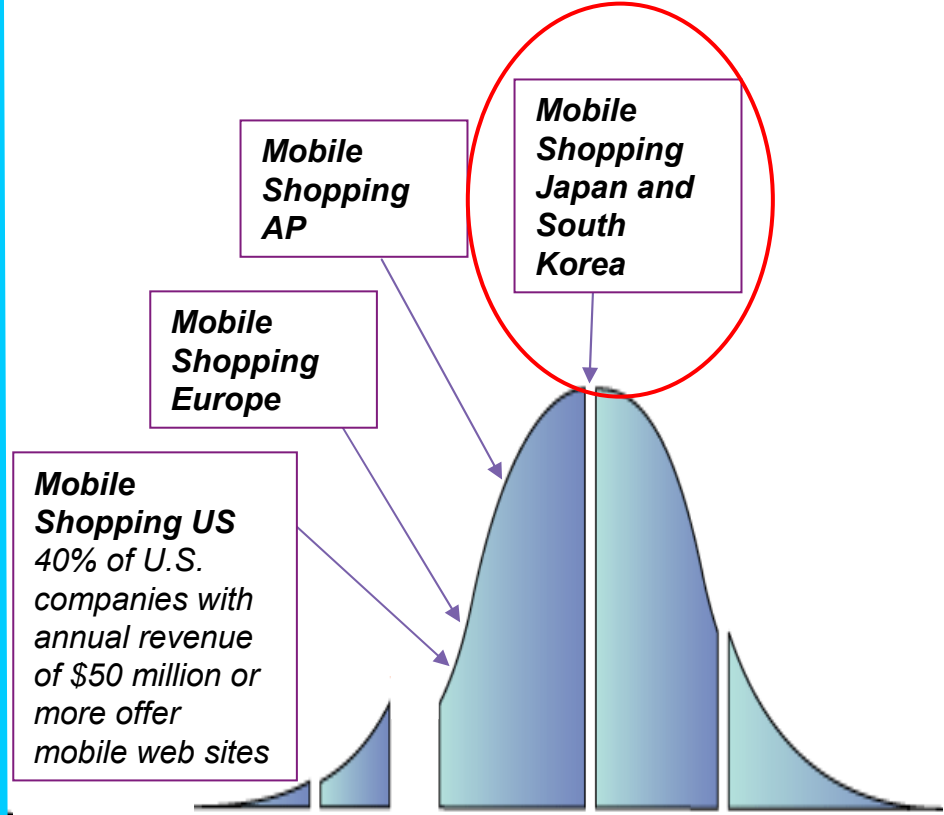
Market adoption rate for mobile commerce varies by segment and geography. Rapidly evolving user behavior coupled with advances in mobile infrastructure will drive an accelerated adoption curve

**Mobile Shopping Japan and South Korea**  
 Japanese do on cell phones almost anything that Americans do on computers: read e-mail and news, search for restaurants, blog and shop



# Mobile Commerce Market Maturity Model: 2011

Improvements in mobile technology (ubiquity of iPhone & clones) will get many retailers thinking about adding mobile commerce channel in the next 12 to 24 months



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# Mobile Commerce – 2009 Recap & 2010 Predictions

- **2009**
  - **Smartphones**
    - 40% growth in number of users
    - Large supply & price drop: \$99 iPhone, and buy one Blackberry or HTC get 2<sup>nd</sup> one free
  - **Wireless Data**
    - Affordable all you can eat data plans
    - Smartphone user sends twice as many SMS than featurephone user
  - **Direct Distribution Channels**
    - Apple App Store has 10s of thousands of applications with millions of billing customer relationships
    - Android, Blackberry, Microsoft and Palm have launched their own App Stores
- **2010**
  - **Social and Mobile Commerce intersecting**
    - Reading Ratings & Reviews and doing research while making in-store purchase decisions
  - **Consumers will start buying on their smartphones**
    - Pizza Hut: \$1M in 3 months
  - **Consumers will begin to rely on expect SMS alerts**
    - Travel industry has used them for years
    - Banking industry using them now for security and fraud prevention
  - **Budgets for Mobile Commerce initiatives will grow**
    - Brands developing more holistic Mobile strategy, instead of pilots or trials
    - Need to support not only iPhone and Blackberry, but also Android and Symbian
  - **Android will emerge as strong OS contender**
    - Dozen new Android smartphones launched in 2009
    - Verizon, Sprint, and AT&T have announced their support
  - **Mobile advertising spend, consumer awareness & expectations will increase significantly**



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Source: Forrester. Predictions 2010: Consumer Mobile Strategies. Jan 7, 2010

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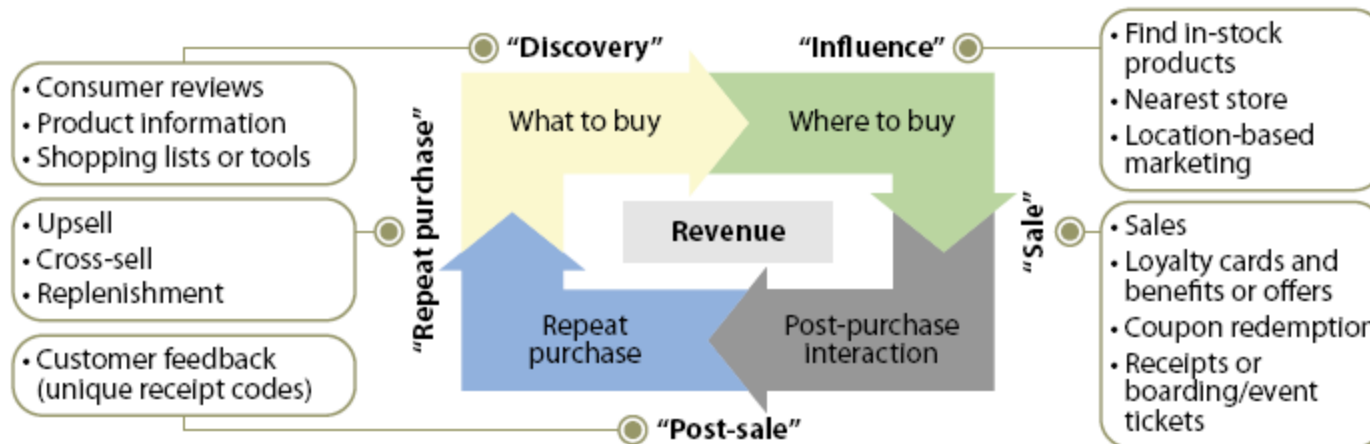
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# Role of Mobile

Mobile delivers benefits in three categories: increased revenue, reduced cost, and higher performance on KPIs

- Mobile Commerce provides value during complete *buying cycle*
  - Product Discovery
  - Influence Stage
  - Purchasing
  - Post-Sale Support
  - Relationship Building to Encourage Repeat Purchase



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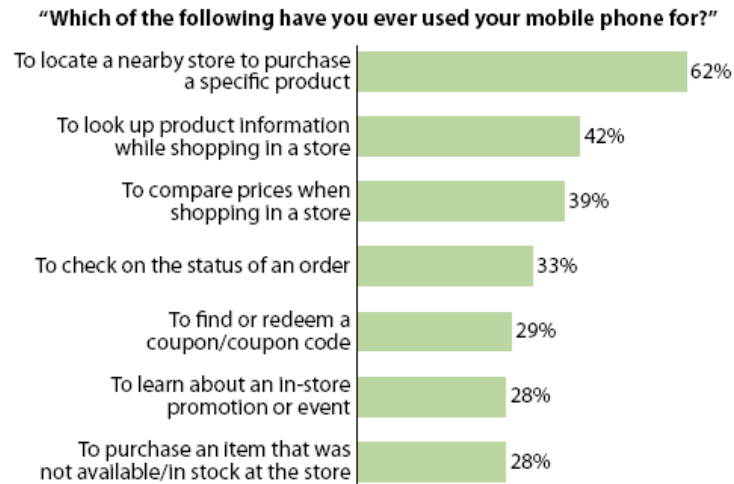
Source: Forrester. The ROI of Mobile. Jan 11, 2010



# The Mobile Web

In devising your mobile strategy, it is critical to take mobile device limitations and strengths into consideration

*“The mobile web is not the web. Understanding this is key... The decade of experience we have cultivated on how to sell on the web cannot be ported straight to the mobile world. Retailers need to think through their mobile strategy from the ground up.”*



Base: 255 US Web buyers who have used their mobile phone to purchase a product (multiple responses accepted)

Source: North American Technographics® Retail Online Survey, Q3 2008

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Source: Forrester Research, Inc.

*Consumers are more likely to shop than to buy from a mobile phone – Gartner*

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# Consumers in different countries have varying levels of comfort in using technology to shop and purchase



**Websites** are widely accepted across countries, especially China



**Kiosks** are popular across all countries, especially Brazil and China



Use of **TVs** to shop and make purchases is also much more accepted in the growth markets than mature markets



**Mobile phones** are much more widely accepted in the growth markets than mature markets

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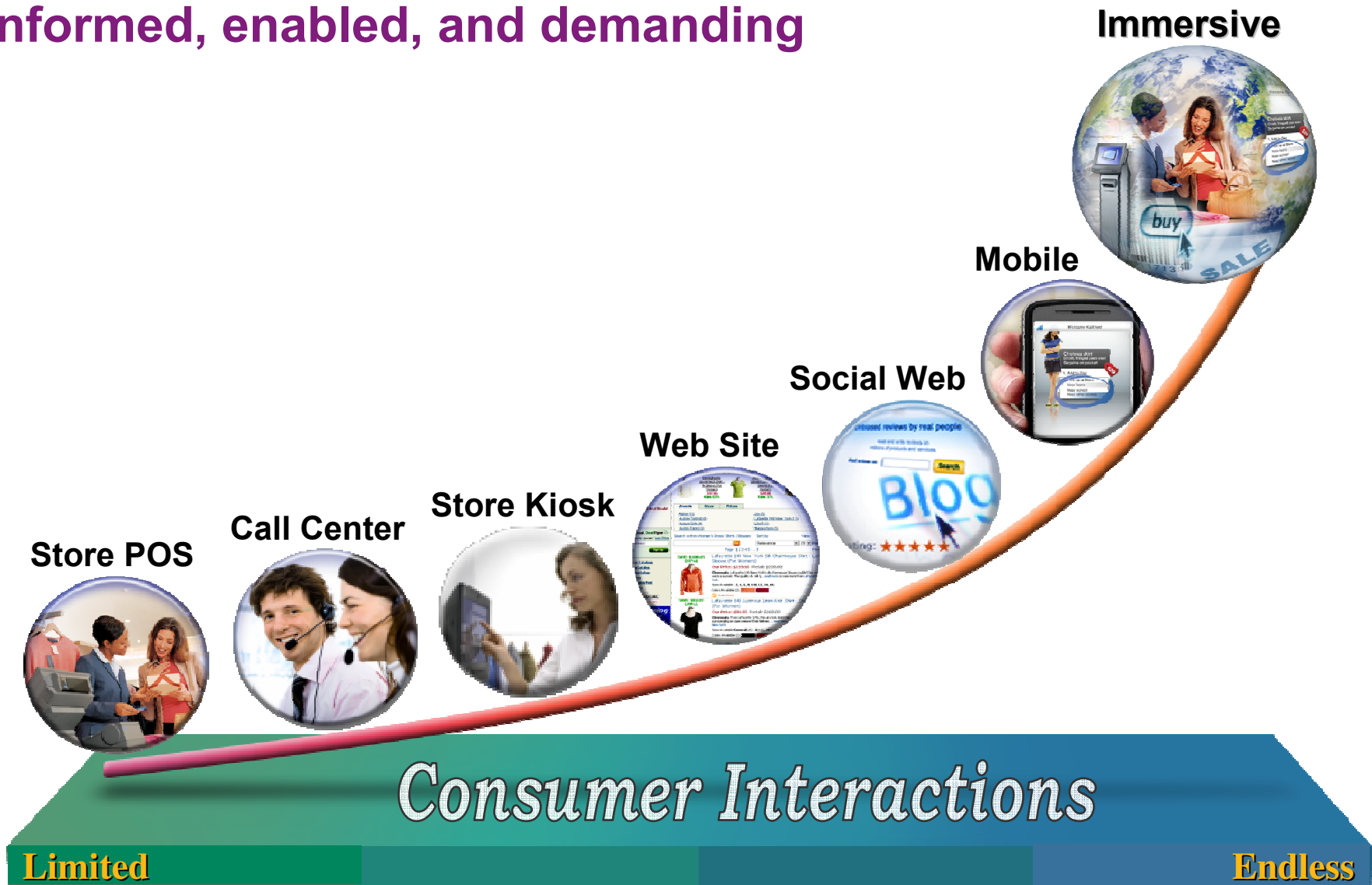
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Source: IBM Institute for Business Value Analysis, Retail 2010, population selected website n=21904; population selected Kiosk n=11423; population selected Mobile phone n=4039; population selected TV n= 5568



# Consumers are becoming Smarter – Increasingly informed, enabled, and demanding



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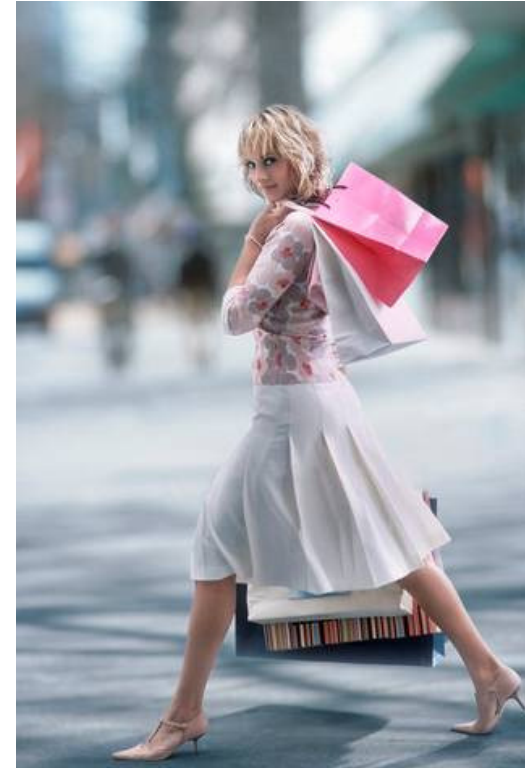
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# Next Generation Commerce: Customer Centric

- Customer centric commerce is about placing the customer at the center of the experience by providing rich, uniform interactions across all touch points
- Customer centric retailers have redefined the customer relationship and the way value is delivered



*It's no longer about merchandising the products you want to sell.  
It is about putting your customer at the center of your strategy  
by providing a rich lifestyle-driven shopping experience*

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# The consumer mobile device will become an essential personal sales tool and more importantly unify the out-of-store and in-store shopping experience



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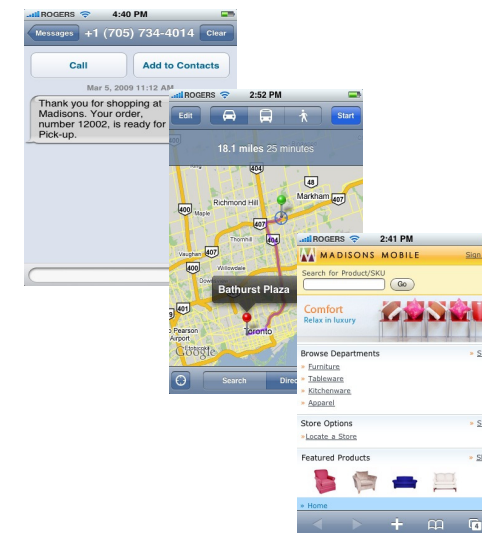


# WebSphere Commerce Mobile Store

- **Mobile starter store (Mobile Web Application)**
  - Optimized shopping flow for smart phones
  - Product content and eMarketing spots targeted to mobile users
  - Store and stock locators
  - Buy on mobile and pickup in store
- **Mobile SMS support**
  - Marketing and promotion
  - Order notification and alerts
  - Store events
- **Benefits**
  - Mobile, web and in-store integration
  - Single view of customers and their orders
  - Store locator and store information
  - Inventory visibility across channels
  - Persistent shopping cart: web & mobile



*Mobile store & SMS for Cross-Channel shoppers*



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## WebSphere Commerce Mobile Store Model

- Easy to customize and deploy JSP/HTML templates
- Store pages conform to W3C mobile standard
- Support smart phones with 240\*320 or higher resolution
  - Supports Apple® iPhone™, Blackberry®, and Nokia smart phones; as well as smart phones using Windows® Mobile and Android™ operating systems
  - Partner's transcoding services for lower end devices
- Common WebSphere Commerce engine with mobile business rules
  - Device/browser detection and routing
  - Mobile specific product content and marketing/promotion
  - Payment plug-in architecture to support mobile payment
  - Channel-aware mobile transactions for analytics



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# Customer Centricity: Cross-Channel Precision Marketing

- Precision Marketing provides automated, *one-to-one*, dynamic merchandising and marketing based on individual preferences and shopping intentions
- WC processes *triggers* and based on previously-defined flexible rules, it initiates an *action* that can be routed through any WC-controlled touch point
- Integrated solution handles on-going dialog with customers, *over time*, across channels as customer's behavior changes



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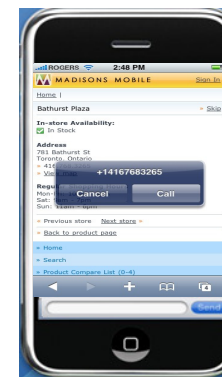
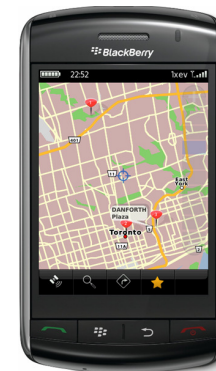
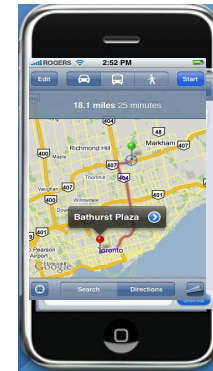
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# WC Mobile – Store Locator

- **Store location search by city or zipcode**
  - Directions from shopper's GPS location to selected store
- **GPS-based store search**
  - Show nearest stores based on shopper's GPS location
- **Store Information**
  - Store hours, address, and other information
  - Click to call the store associate



*Common API for 3<sup>rd</sup> party map service provider integration  
(Google Map, MapQuest, Blackberry map etc.)*

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# Enhance the in-store experience



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# Home Depot: We can help

**How-To Center**

More saving. **More doing.** Store Finder | My Order | My List | My Account | Shopping Cart | Welcome, Sign In or Register | Add \$249.00\* for FREE Shipping

Appliances | Bath | Building Materials | Décor | Doors & Windows | Electrical | Flooring | Kitchen | Lighting & Fans | Outdoors | Paint | Storage | Tools & Hardware

Enter Keyword or SKU   Credit Services | For Pros | Installation | Parts | Eco Options | Gift Center | Savings Center | Local Ad | Help

You are here: HOME > How-To

**How-To Center**

**Prepare for Spring**

**Gardening a Raised Bed**

Learn the basics for gardening a raised bed. This video explains how to plant vegetables and herbs in a raised bed.

- View Project's Guide
- Add to Your Projects

View Hundreds of Projects, Guides & Videos by Category

Select a Category

**More How-To:**

- Get Inspired
- Project Guides
- Project Videos
- Clinics & Workshops
- Design Tools
- Project Calculators
- Buying Guides
- Garden Club

**Associate Tip of the Week**

**Audition Your Plants**

"Choosing a few seedlings of the same plant family, try them in a sunny location before planting an entire bed of new plants. This can help you choose the best plant to buy in large quantities."

*from Jo (Texas)*

**Featured Products in the Project**

<b>Friskars Bypass Pruner</b> \$13.97 <a href="#">Shop Now</a>	<b>Frame It All 4 Timber Raised Garden and Sandbox Kit</b> \$69.97 <a href="#">Shop Now</a>	<b>Spinning Composter</b> \$179.00 <a href="#">Shop Now</a>	<b>PlantSense EasyBloom Plant Sensor</b> \$49.95 <a href="#">Shop Now</a>

**Know How** **Project**

**Installing a ceiling fan**

Hanging a ceiling fan is not mechanically difficult, and most fans come with good installation instructions;

**Tools:**

- Linemans pliers**  
Tools & Hardware

**Materials:**

- Ceiling fan**  
Electrical/Lighting

Home Shop Know How Toolbox

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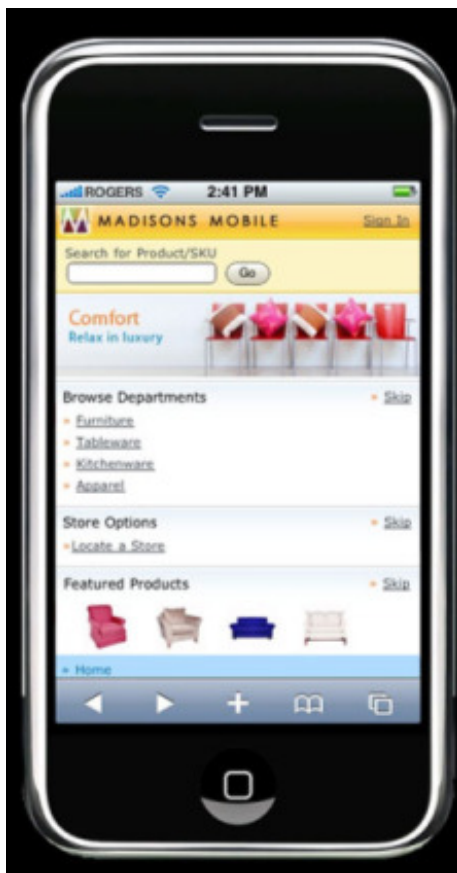
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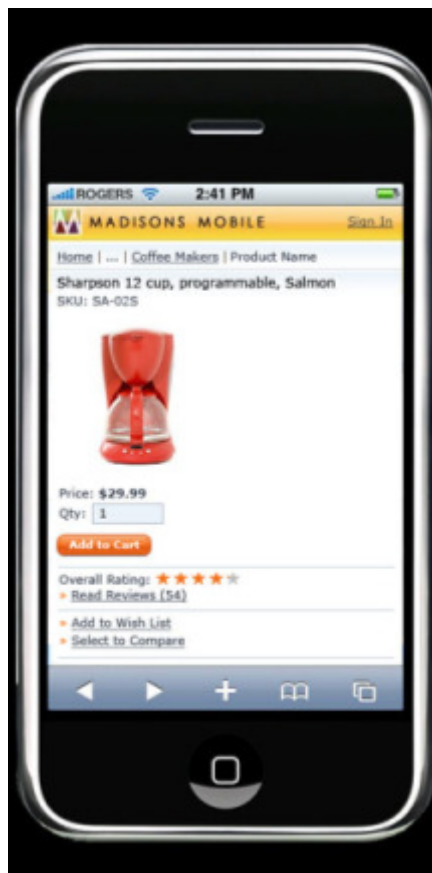


# Mobile Shopping – Out of the Box Deployment

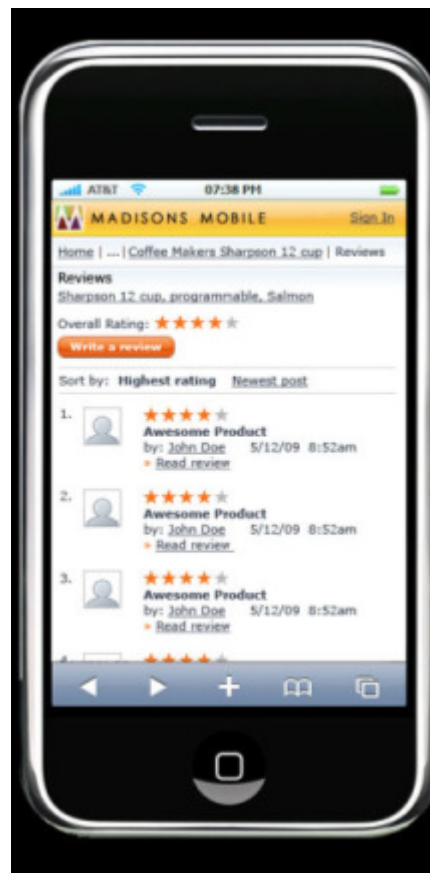
Browse Catalog



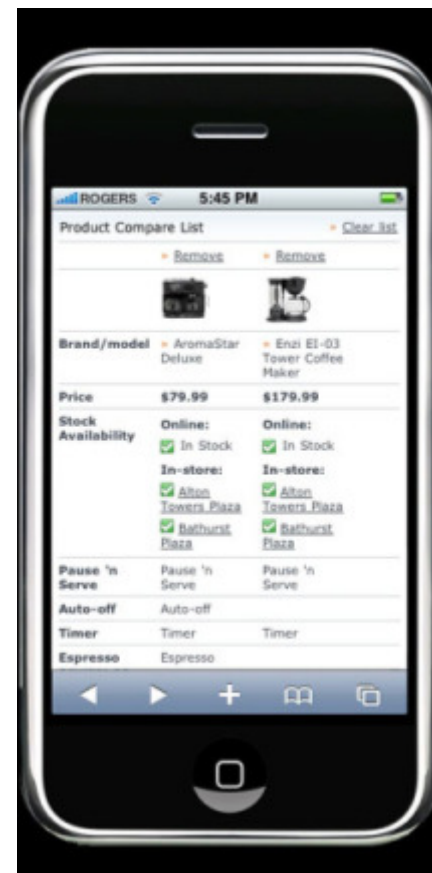
View Product Detail



View Ratings & Reviews



Compare Products



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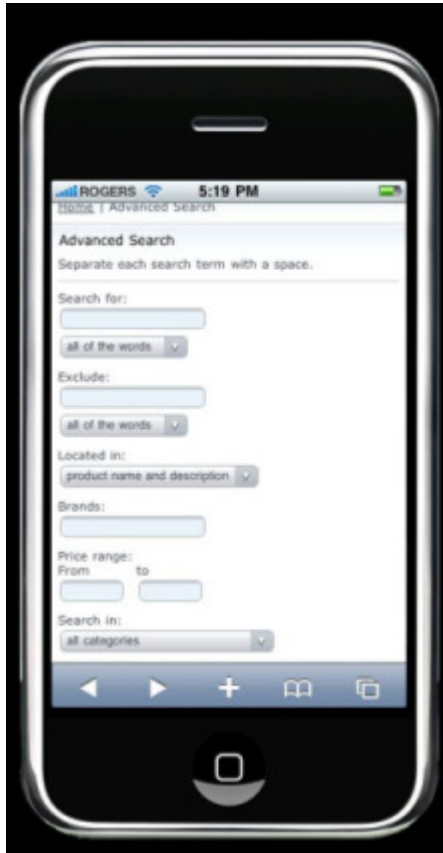
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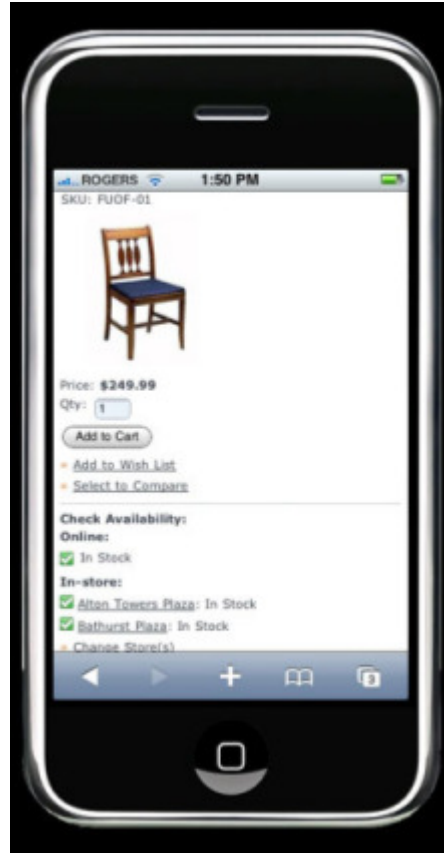


# Mobile Transaction – Out of the Box Deployment

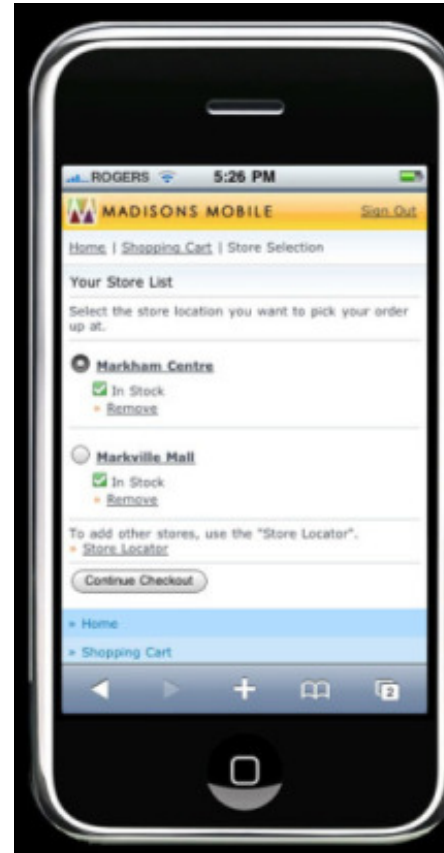
Search Products



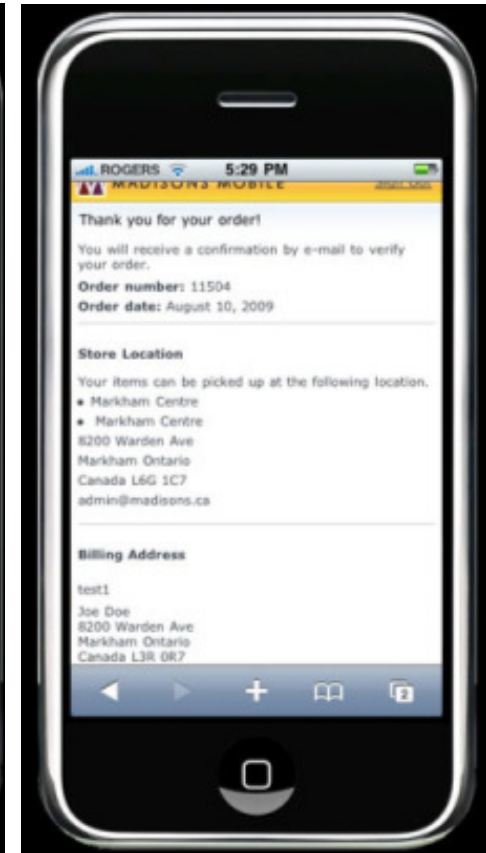
Add to Cart



Select Pickup Store & Checkout



View Order Confirmation



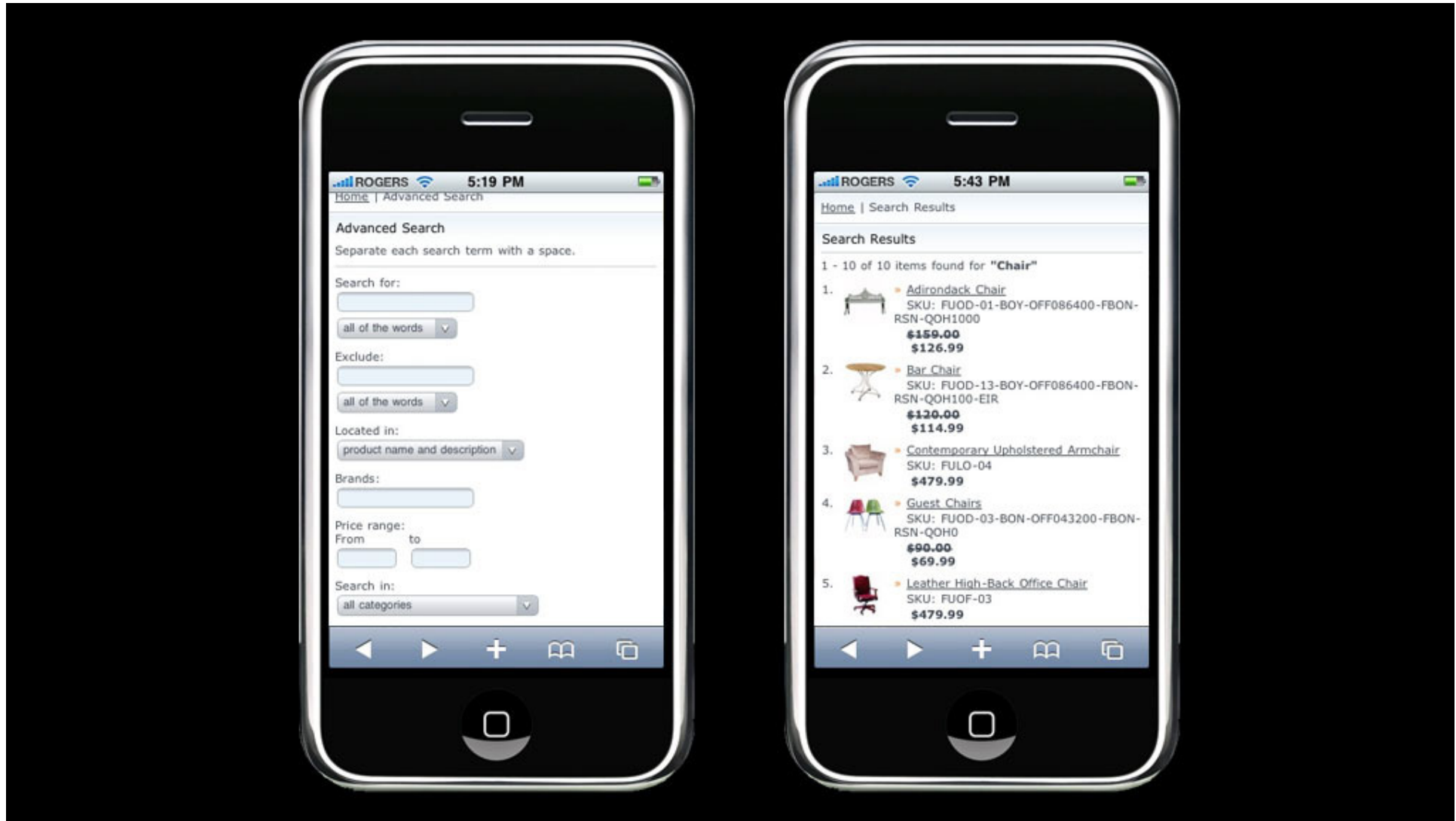
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# Advanced Search



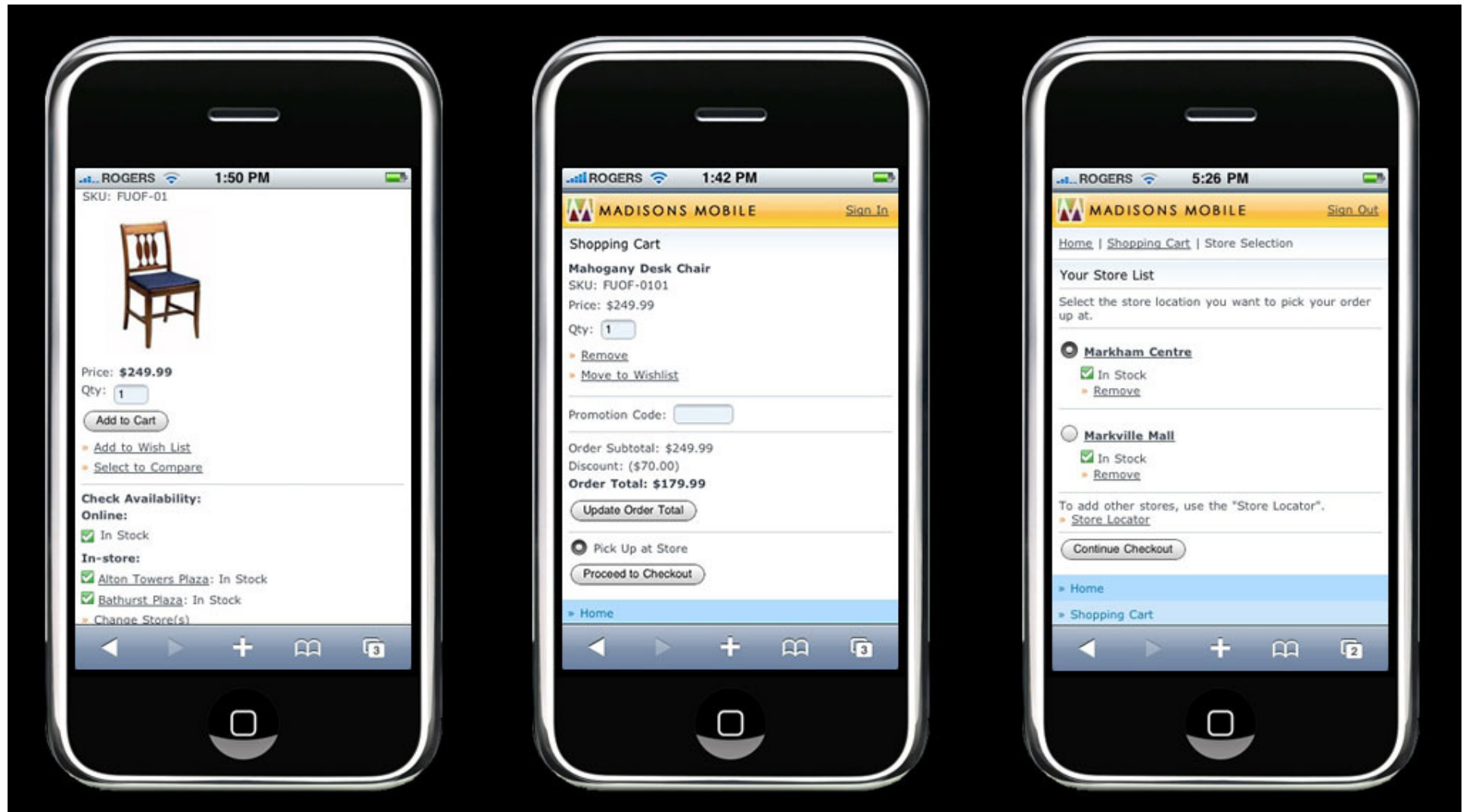
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# Buy-On-Mobile-Pickup-In-Store



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# IBM Rated The Market Leader by Analysts

Figure 3 Forrester Wave™: B2C eCommerce Platform Solutions, Q1 '09

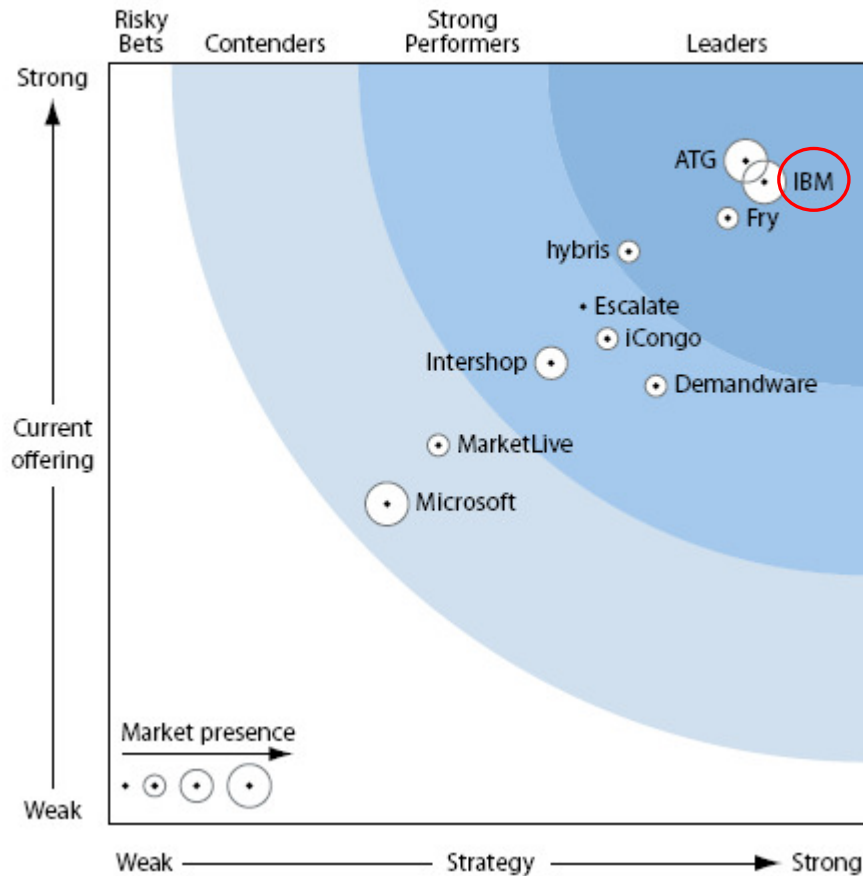
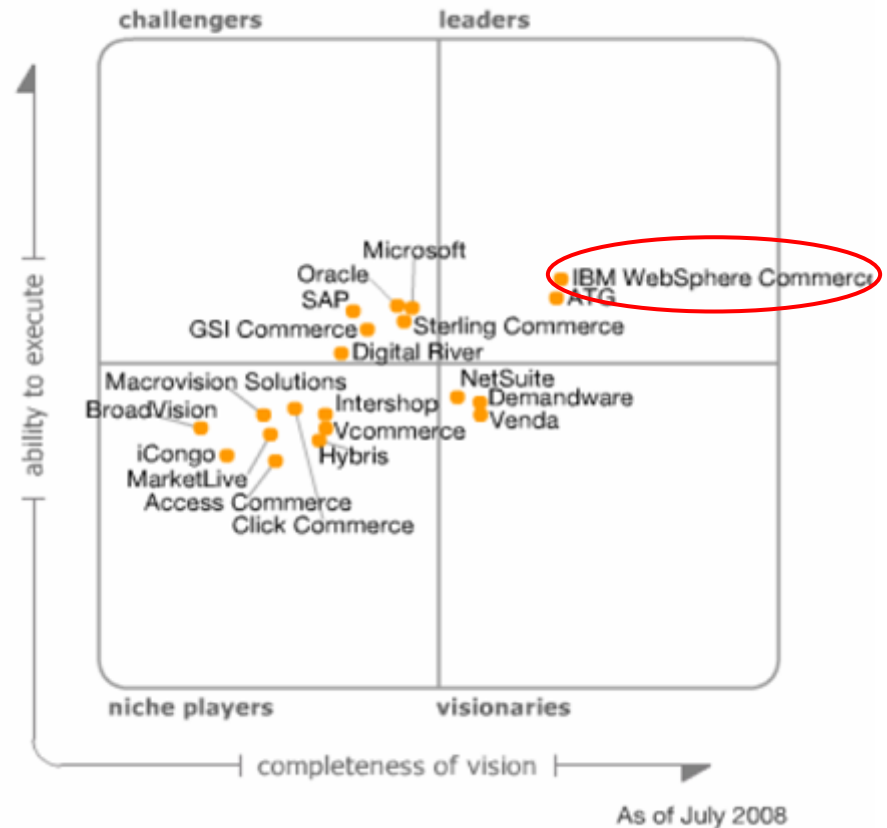


Figure 1. Magic Quadrant for E-Commerce



Source: Gartner (July 2008)

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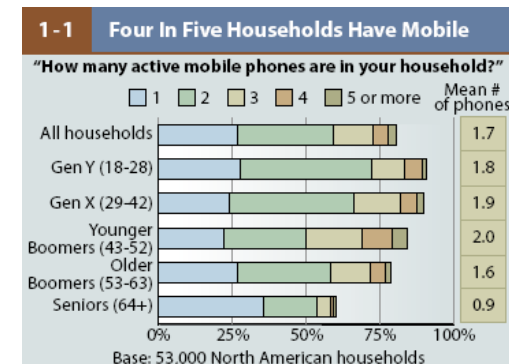
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# Implementing a Successful Mobile Commerce Strategy

Consumer adoption and usage of mobile and multimedia has reached critical mass.  
Any brand that interacts with consumers needs to develop a mobile strategy

- Success in mobile requires a systematic approach
- Forrester mobile methodology (POST) helps companies develop comprehensive mobile strategy
  1. **People:** Identify mobile profile of your target audience
  2. **Objectives:** Decide on your goals
  3. **Strategy:** Determine your approach to meet your objectives
  4. **Technology:** Choose technologies to implement your strategy
- First, we need data-based understanding of how mobile-advanced our brand's consumers are and will be
- Next, determine objectives — to grow revenues or cut costs
- Then, build mobile strategy based on level of corporate commitment, desired offering, and willingness to engage partners
- Once these three steps are completed, we choose technologies to implement these strategies



Source: The POST Method: A Systematic Approach To Mobile Strategy. Forrester. 2009

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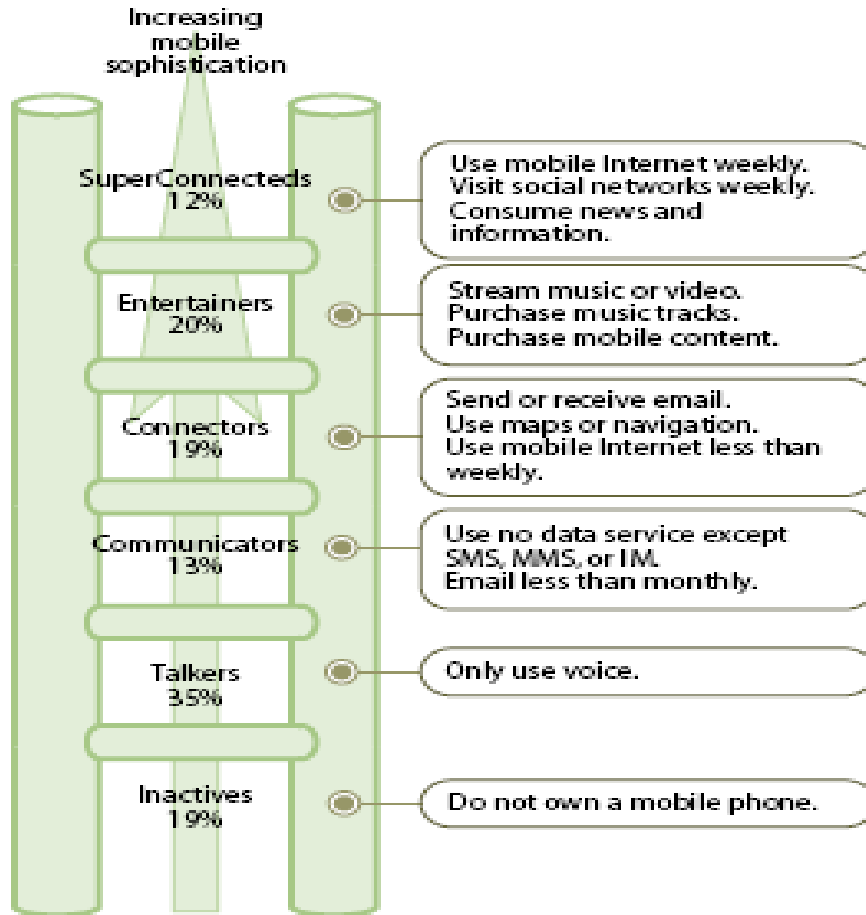
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# Identify Mobile Profile of your Consumers

Mobile strategies fail because firms do not understand how *their target audience* use mobile phones



Base: US adults

Source: Forrester North American Technographics Benchmarking Survey, 2008



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# Mobile Marketing

- Mobile Marketing
  - Broadcast SMS
- Mobile Couponing
  - Mobile coupon wallet
  - Mobile coupons may be delivered as SMS or offered and stored in 'mobile coupon wallet'
- Don't treat mobile as an isolated channel
  - Use a Customer Interaction Platform to capitalize on mobile as an integrated touch point
- Brand Relationship Building
  - Order confirmation and status: "Where is my order"
  - Text me when order is ready for pick up

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*The mobile device presents an exceptional marketing vehicle for today's marketers. Analysts estimate that almost "3 billion mobile coupons will be issued to Mobile Users by 2011" – Juniper Research*

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**BORDERS.**

**Welcome to Borders Mobile!**

Thank you for choosing to receive this offer by text. Please enter your mobile number below and the offer you selected will be sent to your mobile phone shortly. Please note - we will only send you the specific offer you selected unless you tick the opt-in box below.

Enter Mobile Number

Tick here to receive future offers from Borders Mobile

Tick here to confirm you have read the Borders Mobile [terms and conditions](#)

**Save 25% off one item until March 12<sup>th</sup>. Just mention coupon 95278 to the cashier.**

**Mobile Campaign targeting loyal customers drove a 69% opt-in rate resulting in 15% of net sales generated by digital marketing during the same period**

**And the buzz:**  
*I love that I can just walk in and get a book and always have a coupon on hand now.*





# Deliver timely information and build brand relationships with mobile messaging



*"Text me back with Rock, Paper or Scissors. I already know what I'm throwing and if you beat me I'll add 100 Moosejaw Points to your account now."*

- 1.) Package tracking for their customers
- 2.) Text2Win
- 3.) Customer service
- 4.) Add hock promotions

A screenshot of the Vans Mobile website registration form. The form is titled "VANS MOBILE" and includes a "SEND ME UPDATES ON:" section with checkboxes for SKATE, SURF, SHOW (checked), BMX, MOTO, GIRLS, MUSIC, ART, and SWEEPSTAKES. Below this is an "ENTER U.S. PHONE NUMBER:" section with input fields for area code (303), prefix (520), and number (9417). The "SELECT CARRIER:" section has a dropdown menu set to "T-Mobile". The "BIRTH DATE:" section has a date input field showing "08/28/1988". The "GENDER:" section has radio buttons for "MALE" (selected) and "FEMALE". A "SUBMIT" button is at the bottom. To the right of the form is a mobile phone icon and a "POWERED BY: POPBANDIT" logo. Below the phone is a "CLICK HERE TO GET FREE MOBILE WALLPAPERS" section with a grid of wallpaper thumbnails and a "DOWNLOAD NOW!" button. At the bottom of the form, there is a Surflife logo and a small disclaimer: "Receive up to 2 messages/category per month from Vans. Standard messaging rates, terms and conditions will apply. May not be able for handsets. Check with provider for details. To cancel or for help text 'STOP' or 'HELP' to 47201."

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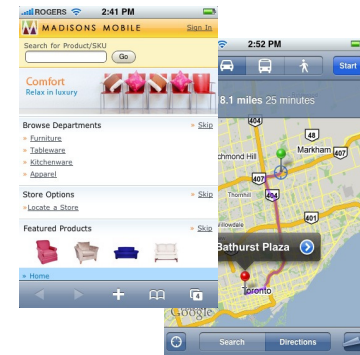
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# Mobile Technology Comparison

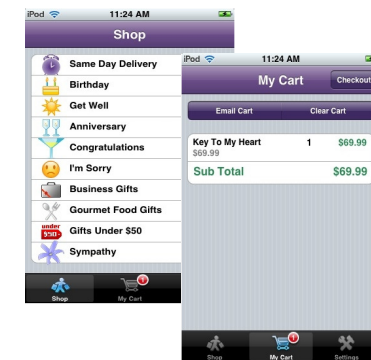
## 1. Mobile Web Application

- Web application programming model
- Portable across multiple smartphone platforms
- Accessible through browsers on mobile phones



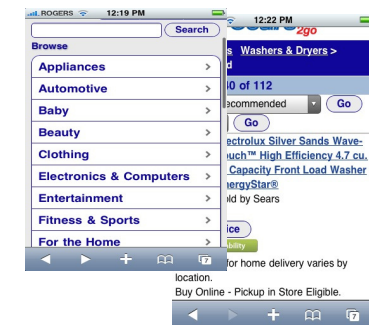
## 2. Mobile Native / Hybrid Applications

- Rich UI layout and user experience
- Web View + Native UI shell and device API
- Distribution through Application Stores



## 3. Mobile Transcoding Applications

- Broad coverage for various mobile devices
- Minimal programming required
- Does not leverage smartphone capabilities



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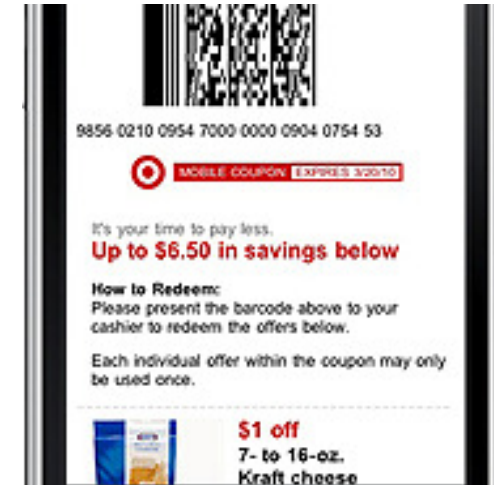
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# Mobile Coupons and Tickets

- Nationwide mobile coupons and tickets are starting to be deployed
- Coupons
  - Redeemed by scanning 2D bar codes at checkout
  - Offers are single-use and have expiration date
  - New offers sent each month
  - After opt-in, shopper receives SMS with link to mobile Web page with offers
  - Consumers can also access Mobile Gift Cards, view online catalog, check product availability, store locations, gift registry, and weekly ads
- Movie Tickets
  - Consumers buy ticket via their mobile and have it scanned at theater entrance
  - Shoppers can buy tickets in advance, read reviews, commentaries, and watch trailers



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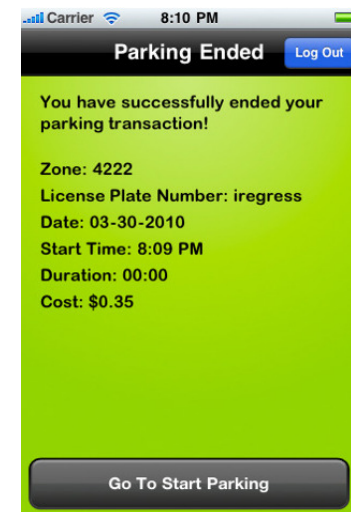
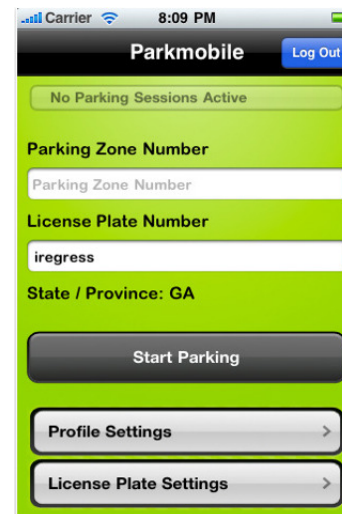
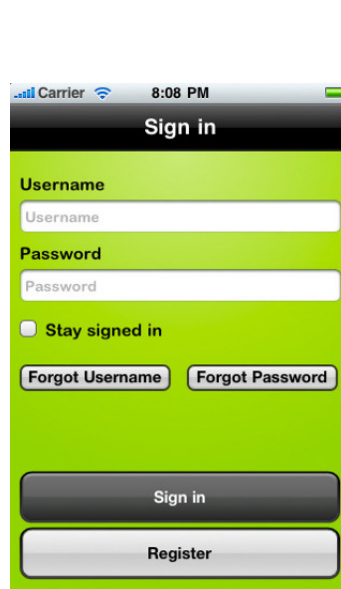
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# Mobile Payments

- Parking mobile payments are starting to be deployed
  - Customers register via phone, web, or downloading mobile App
  - Customers can select option to receive text message alerts & reminders before parking time expires
    - Atlanta: Lanier parking lots located in downtown and midtown Atlanta
    - Albuquerque: Park-It-Place locations surrounding University of New Mexico campus



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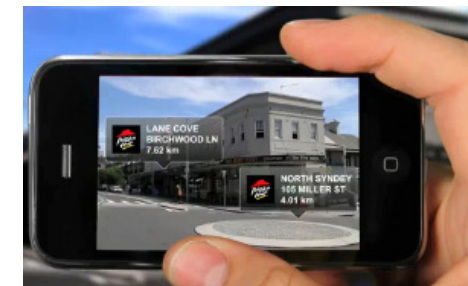
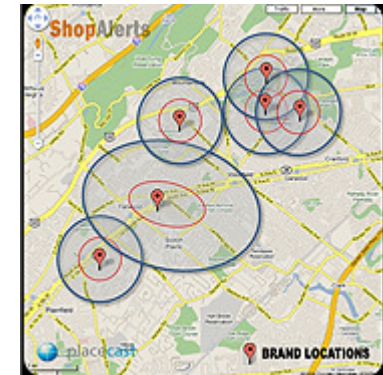
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# Presence or Location-Based Marketing & Promotions will Drive In-Store Traffic

- **Targeted marketing messages based on location & time**
  - Deliver time-based and location-triggered mobile messages when opted-in consumers enter pre-defined area
  - Drive traffic into physical stores by delivering relevant mobile marketing messages
  - Retailers will be able to define zones in the store
  - Consumers will choose brands they are interested in and opt-in via SMS, online, mobile Web, social network, or in-store
- **Targeted areas created around locations and are set to trigger personalized marketing messages**
  - Customers have to enter defined area to trigger a message
  - Allows retailers to reach customers when they are nearby
  - Allows delivery of relevant communications based on place & time
  - Retailers will control frequency of messages
- **Expect to see usage of GPS, cell-tower triangulation, Bluetooth, or Wi-Fi hotspots to locate consumers**



Source: Internet Retailer. New mobile ad system targets consumers by location. May 27, 2009

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# Looking Forward & Recommendations

Mobile phones are always on and always with us. This makes them different ... makes them immediate and intimate

- Mobile will become more relevant by delivering timely targeted messages
- Brands will need to transition from mobile connectivity ... to content ... *to context*; to develop deeper relationship with customers and convert them into brand advocates
- Successful mobile experiences need to provide
  - **Sense of coherence** among multiple apparently disjointed messages
  - **Immediacy** by delivering timely information and services. The always-on aspect of mobile phones strengthen its immediacy
  - **Simplicity** in number of steps and time needed to complete a task
  - **Context** in the interaction by leveraging knowledge about web browsing behavior, purchase history, and location

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Sources: Mobile Marketer. Mobile: Where cognitive anthropology meets marketing. Mar 16, 2010

The Convenience Quotient of Mobile Services. Forrester. Oct 19, 20109



**Mobile and social commerce are increasingly woven into the social fabric through cross-channel connectivity**

- **Increased connectivity**
- **Increased pervasiveness of content**
- **Increased integration across channels**
- **Increased collaboration**
- **Increased personalization**

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감사합니다  
Thank You

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