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Marketing Planning & Practice

INNOVATION IN MARKETING PLANNING

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EXECUTIVE SUMMARY

The report will:

- Briefly introduce the background of the O2O massage industry.
- Evaluate the external and internal marketing environment using a variety of traditional and digital marketing audit tools and techniques.
- Taking key challenges and constraints into consideration.
- Appraise the strategic options available for developing creative strategies through segmentation, targeting and positioning.

1 INTRODUCTION

1.1 BACKGROUND

With the rise of income Chinese people are now pay much attention to the massage service and massage and related health services have become popular forms of consumption. In addition to star hotels in major cities that provide massage services, there are also some stores in small cities (Md, 2015). Massage has been viewed as a form of treatment like other ancient medical practices in Asia. The Chinese medical classic book *Huang Di Nei Jing* refer to the value of massage as a therapeutic treatment. Massage is the main method to treat fever in ancient times (Huang Di Nei Jing, 2009: 271-72). Now massage has developed into a new product rather than a cure. The massage industry has been promoted by private sector and supported by Chinese government (Md, 2015). Chinese middle class has high-paying jobs such as management and technology, but they also suffer from various occupational diseases because of long working hours. They do not have much time to go to traditional massage stores even though they suffer from burnout syndrome both mental and physical (Islam, 2012). In order to meet the market demand for above occupational diseases patients, the O2O massage company came into being. At present, there are two kinds of O2O for massage door service, one is the door-to-door service platform launched by traditional massage merchants, and the other is the O2O platform launched by entrepreneurs. There are also two forms of physical store service, one is Meituan, Dianping, Baidu Nuomi's group purchase, and the other is the O2O platform created by entrepreneurs.

1.2 SCOPE OF REPORT

The aim of this report is to make a marketing planning for a Chinese O2O massage shop called Diandao.

The objectives of the project are:

- Analyse the external market environmental factors including macro environment and micro environment of massage industry in China.
- Conduct a internal analysis of Diandao and then give a SWOT analysis based on all the above analysis.
- Market segmentation, select target market and make market positioning for Diandao company.
- Develop a marketing mix strategy based on target groups that have been identified.
- Provide an evaluation of the plan.
- Develop a brief marketing plan budget.

1.3 RESEARCH METHODOLOGY

1.3.1 SECONDARY RESEARCH

The main research method of this report is secondary research. Secondary research means reprocessing on the basis of existing research, including non-systematic studies (what we often refer to as literature reviews) and systematic reviews (Glass, 1976). Related market information is a key part in the internal and external environment analysis. The major sources of information are secondary data and information will be gathered from current website of Diandao and other competitive enterprise. Waht existing resources they have and how the development of these companies. It will also look at other consultancy websites to see how they compare these massage shops. Finally it will use internet sources to look at any relevant literature/theories that can be used in the report.

1.3.2 POSSIBLE CONSTRAINTS AND LIMITATIONS

Although second research is less expensive, less time-consuming and more objective than doing primary research in China, it also has some drawbacks. For example,

secondary data in some specific cities is scarce and some data may be unreliable.

2 DEFINITIONS OF MAJOR CONCEPTS

2.1 MARKETING MIX

The marketing mix is an important part of the company's marketing strategy. It refers to the integration of the basic marketing measures that the company can control. The marketing mix elements are summarized as products, pricing, channels, and promotions by McKinsey. In 1981, Booms and Bitner suggested to add three another factors: people, process and physical evidence. It reveals the importance of employee involvement in the overall marketing campaign. Enterprises should pay attention to the whole process of providing services to users, understand the customers' experience in this process through interactive communication, and make the customers become participants in the service marketing process, so as to timely improve their services to meet customer expectations (Doyle, 2011).

3 MAIN FINDINGS

3.1 MACROENVIRONMENT ANALYSIS

3.1.1 POLITIC ANALYSIS

The Ministry of Commerce, the Ministry of Labor and Social security and other related departments issued laws and regulations with regard to massage industry. In 2006, the Ministry of Labor and Social Security passed the national standards of health therapists, which make a specification of the technical capabilities of professional massage therapists. After two years, the Ministry of Commerce passed the regulation about specifications of foot massage health care business. The China Disabled Persons' Federation, the Ministry of Health, the Department of Human Resources and Social Security and the State Administration of Traditional Chinese

Medicine jointly issued the ‘Measures for the Management of Blind Medical Massage’ in 2009. The Standardization Administration of the People's Republic of China passed the General Requirements for Health Services and the Classification of Health Service Industry in 2013. In general, the introduction of these policies and regulations put forward requirements for the management of the massage industry, reduced or avoided unfair competition to some extent and promoted the healthy and orderly development of the massage industry.

3.1.2 ECONOMIC ANALYSIS

The GDP of China has continued to grow as following line chart shows, also national income also has continued to increase as the figure 2 shows below.

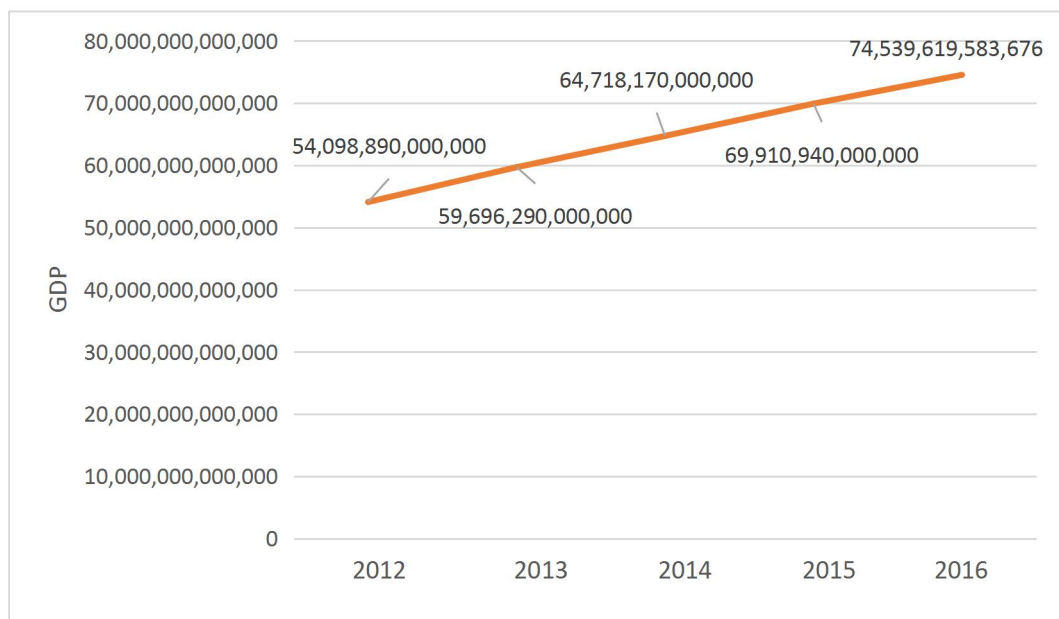


Figure 1. GDP in China from 2012 to 2016

(Data Sources: UNSD)

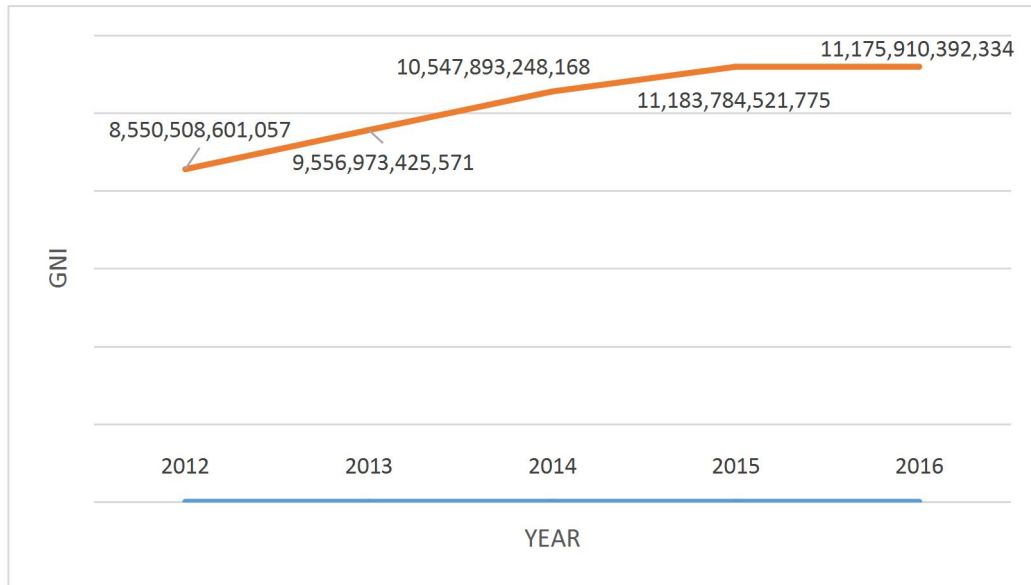


Figure 2. GNI in China from 2012 to 2016

(Data Sources: UNSD)

The overall national health and medical awareness has continued to increase.

Sub-healthy people account for 75% of the total population, and the massage industry has a huge market for development.

Business leisure, massage for pregnant women, rehabilitation massage, and on-site service have broadened the business scope of the massage industry and become its new profit channel.

3.1.3 SOCIAL & CULTURE ANALYSIS

The increase in economic income makes it possible for people to receive massage services and a series of social issues also drive the expansion of the massage service industry in China. One of the most obvious social problems is the health care problems brought about by the acceleration of the ageing process for recent decade. When the elderly population aged 60 and above account for 10% of the total population of a country or a region, or 65 and above, constituting 7% of the total population means the country or region goes into the aging society (Yuji, K. et al, 2015). The proportion of elderly people aged 65 and over in China is close to 10% in 2016. According to the 2013 China Human Development Report, by 2030, the

proportion of people aged over 65 in China to the total population will increase to 18.2% (Bin, 2016). Secondly, the incidence of chronic diseases has risen rapidly, and the need for disease surveillance has increased. In 2013, more than 260 million people were diagnosed with chronic diseases (<http://www.chinacdc.cn/>). Thirdly, sub-health has become a common problem in China society and the idea of preventing disease and treating undeveloped diseases is gradually accepted by the public (Qingfu, 2017). Massage has a very good effect on the treatment and prevention of sub-health, and the sub-healthy and high-incidence population has relatively high income. The consumer groups are concentrated and easy to be distinguished, and their potential needs can be satisfied through effective market segments. Lastly, the formation of consumer O2O consumption consciousness provide the possibility for the development of O2O massage service.

3.1.4 TECHNOLOGY ANALYSIS

The rapid development of the Internet contribute to the rise of ideological trend called 'Internet plus' in China in recent years. Popularization of mobile terminals and widespread application of mobile Internet technology provide technical prerequisites for the massage industry to adopt the O2O model and the application of big data technology ensures the possibility of personalized service.

As far as the macro environment of the massage industry is concerned, the following points can be summarized: policies promote the formal and orderly development of the traditional massage industry; Economic background promotes the establishment of health care awareness; Various social issues prompted the expansion of massage services and technological environment accelerates intelligent transformation in the massage industry.

However, the emergence of massage robots may have a negative impact on the massage industry. According to the news of Nanyang Technological University in Singapore, the robot named Emma has the potential to address manpower and lower treatment cost. It can be low-cost treatment alternatives in countries like China where

health care costs high, especially when facing the aging population problem with a growing demand for chronic pain management treatment (<http://news.ntu.edu.sg>).

3.2 MICROENVIRONMENT ANALYSIS

In addition to the above macro-environmental aspects, micro-factors at the industry level need to be taken into account. The following figure is about the brief development of the Chinese massage service industry. Massage services can be divided into two major categories: for leisure, such as weight loss massage, beauty massage, both can achieve the purpose of eliminating fatigue and health care; for treatment, treat chronic diseases and functional diseases, can achieve the goal of treatment to some extent (<https://books.google.co.uk/books?isbn=7504525367>).

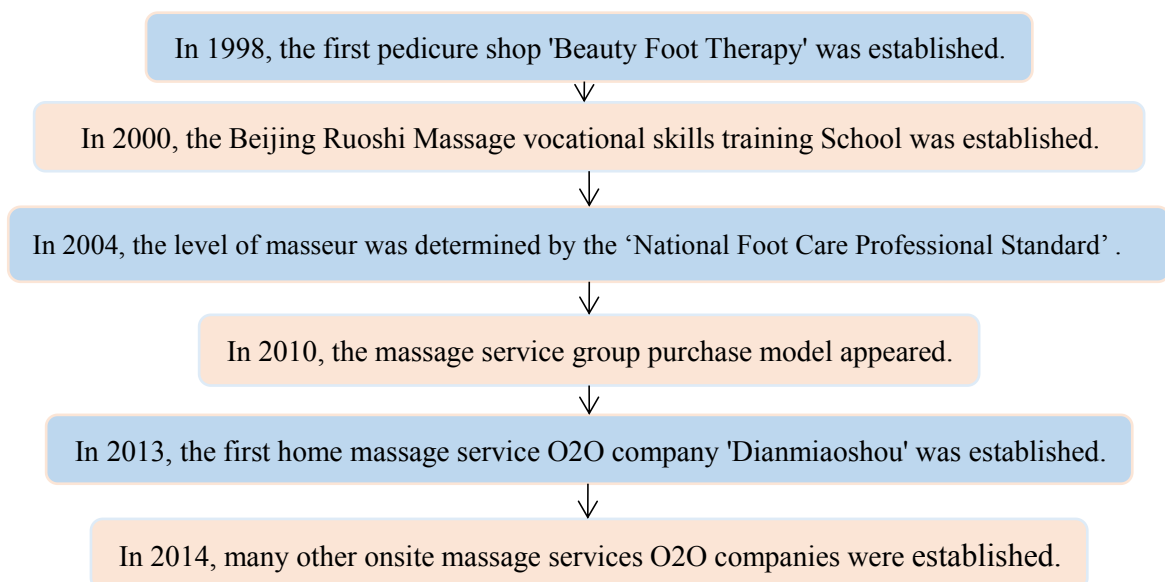


Figure 3. Modern massage service industry development process in China

Since traditional massage industry combined with resources such as the Internet, massage service O2O has developed rapidly. There are several massage O2O platform, such as Gfxiong, Dianmiaoshou, Laiyizhang and so on. In addition, massage service landed major group purchase website including Meituan, Dazhongdianping, BaiduNuomi and Jingdong. Also, massage landed comprehensive e-commerce website including Tianmao, Yihaodian and Paipai. Last it has combined with tourism industries like Ctrip and Qunar. At present, O2O massage services mainly focus on

physical shoppers, and users habits of on-site massage services need to be strengthened.

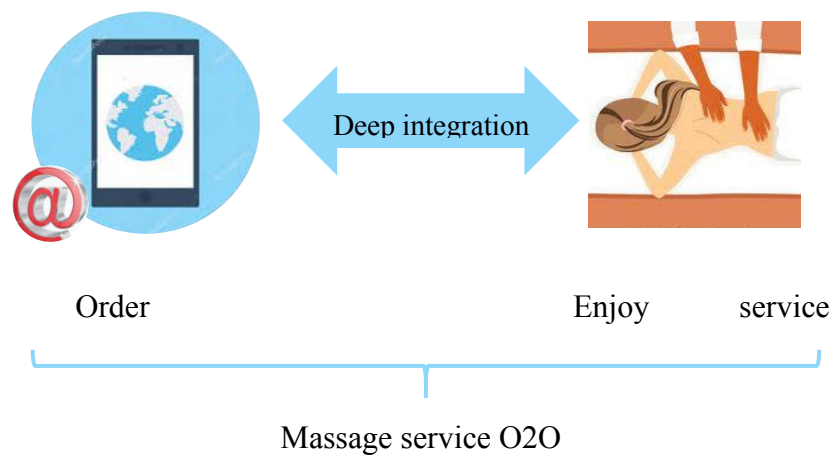


Figure 4. Massage service O2O

3.2.1 Competitor Analysis

	Diandao	Gongfuxiong	Yisheng
Model	Online reservation (Wechat / APP / website)	Online reservation (Wechat / APP)	Online reservation (Wechat / website / phone)
Competitive advantage	Flexible allocation; Initial WeChat public promotion method can dispel customer safety concerns easily.	Huge financing; The first one to enter the O2O massage market; Strong marketing ability.	Experienced; Media promotion; Many kinds of services.
Position	On-site massage service provider	Focus on user experience and technology and try to build responsible brand	Extend deeper health management services based on on-site massage
Market share	Individual user day orders exceed 1000 (Exclude the enterprise)	Repeat purchase rate 24.8% per month Day orders 100	Repeat purchase rate 30%

Figure 5. Competitor Analysis

Another Competitor of Diandao: Shop massage O2O

Shop massage O2O refer to the massage mode that conduct transaction online and enjoy massage service offline by using O2O platform. Most of the traditional massage stores operate autonomously and have their own massage team. They only use the group purchase websites such as Meituan and Nuomi, in order to achieve the transformation of the O2O model. Consumers can take consumer vouchers to massage stores for consumption through group purchases.

Advantage: Under this model, traditional massage stores are more traditional in terms of their operating characteristics and do not have much highlights. They just have another online channels. But tradition has its advantages: in-store massage O2O, relative to home massage O2O, its massage equipment is more complete, massage venues are more professional, physical stores can make consumers are more at ease; it is easier to manage and control their own masseur team, and control costs.

Disadvantage: To make a difference in this model, all aspects of business services should be improved. For example: constantly strengthen and invest in the brand, the intensive maintenance of old customers. In these two aspects of operations, the team needs to have strong management capabilities, but also need to invest significantly and spend much time. Relative to the start-up team, the operating difficulty coefficient is large.

3.2.2 Customer Analysis

For many people, massage is a leisurely and relaxing way of consumption, and it is also a healthy method of conditioning. However, many people often relax when they are physically and mentally exhausted and they are not willing to go to the store ,then on-site service become their potential psychological needs. Especially for some elderly people who are inconvenient to move, the greatest advantage of on-site service lies in its convenience (Kazuko & Keiko, 2016). However, it also has some obvious drawbacks for customers, especially at its early stages. There are certain hidden dangers in personal safety at the door-to-door service. At the same time, there may be

legal disputes, because it is easy to generate problems if the leisure massage is not done well.

3.2.3 masseur analysis

On the one hand, the presence of O2O services for on-site massage has motivated masseurs to establish direct contact with users, promote masseurs to build personal brands, and focus on improving their own professional skills.

On the other hand, it has been reported that the masseur decoupled from the platform and directly contact the old customers for free orders, which can be seen as a threat to the online platform (<http://news.newseed.cn/p/1320326>). The level of masseurs is uneven, and many personal masseurs have started massages without rigorous massage training, which is very bad for the user's experience. Because if the user is not satisfied with the services provided by the masseurs, it will leave a negative impact on them about the O2O platform and the possibility of re-experience may decrease. Therefore, these online platforms must do the necessary assessment work before hiring a massage therapist, but also must establish a good incentive mechanism to prevent the loss of excellent or experienced masseurs.

3.2.4 Overseas massage O2O company analysis

Zeel massage company provide alternative medical services such as massage, its diversified service model is shown below:

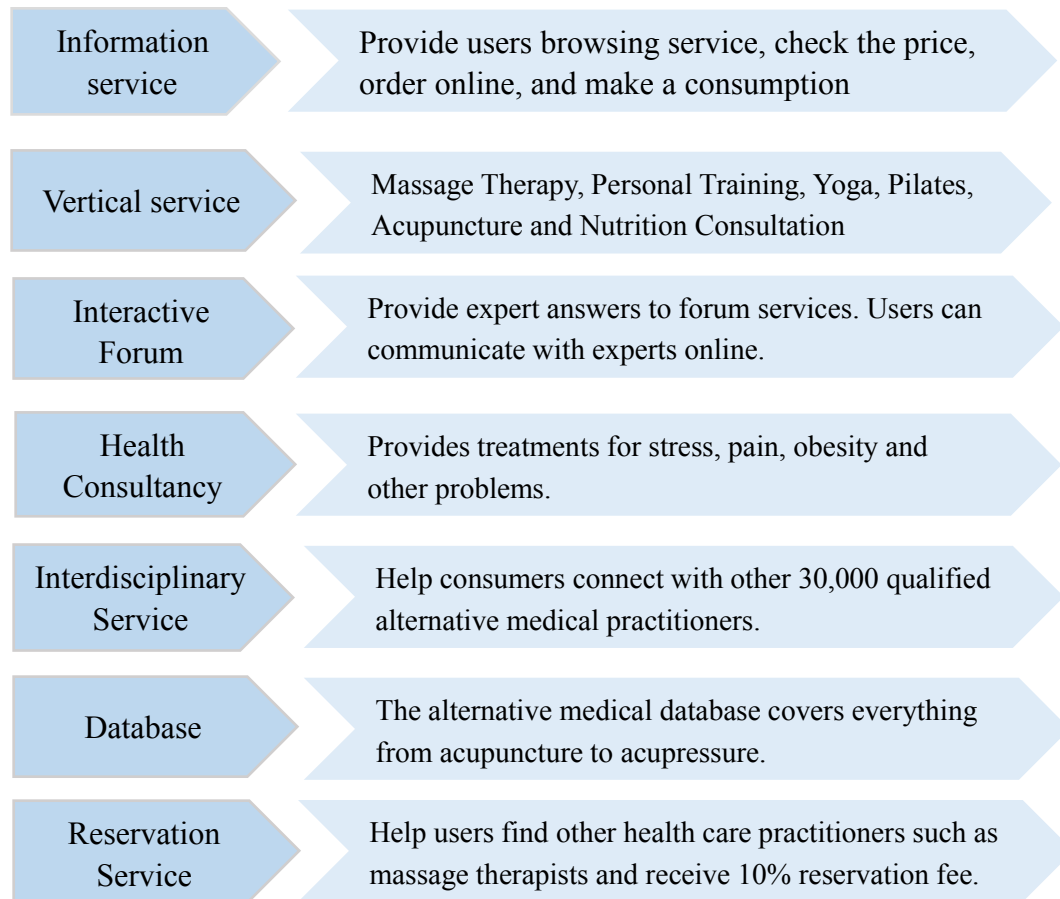


Figure 6. Diversified Service Model of Zeel Massage

Diversified services help Zeel Massage to increase its user stickiness, and paid subscription models are also recognized by customers.

3.3 INTERNAL ANALYSIS

(1) Business Scope

Geographically, Diandao provide massage services to customers of 29 cities including Beijing, Shanghai, Tianjin, Shenzhen, Wuhan and so on. Also, Diandao can make real-time regional order adjustments, and provide support for areas where masseurs are not enough. It has provided massage services for 14 well-known companies so far including 58, P & G, IBM, etc.

(2) Manpower

Some masseurs of Diandao have been certified by the Ministry of Health, the Ministry of Human Resources and Social Sciences, and the National Institute of Traditional

Chinese Medicine, so they have a certain degree of competitiveness. Besides, the method of assigning a job is more flexible than traditional massage shops. Masseurs are seen as mobile resources, so they can still accept the work of other customers at any time on the way. Due to improper massage and demand, masseurs may under great psychological pressure like masseurs of other shops.

(3) Money

In terms of funding, Gaoyan Capital, Banyan Fund and 58City had invested RMB 10 million in it in October 2014 . Hangzhou Incapital and Banyan Fund invested 5 million US Dollars in Diandao in April 2015.

(4) Early promotion methods

"Diandao" is a mobile phone application that allows an on-line appointment of massage therapist to provide the massage service. The user can schedule an offline health care service by the application or Wechat public platform. Diandao has just enter the one-stop home service platform called '58' to increase the flow and to ensure the quality of service. With regard to initial promotion of Diandao, the above promotion method can dispel worry of customers because the recommendation of Diandao is based on relationship.

(5) The way of reservation

About user experience, the user can choose random mode, manual delivery or designated technician by the customer service.

(<https://m.diandao.org/>).

3.4 SWOT ANALYSIS

(1) Strengths:

- Lower price than traditional massage store. Personal home massage will have a price advantage than traditional massage business, because they do not need to rent a store, which saves a lot of rent. In addition, compared to the massage in the store, individual massage therapists do not need to submit part of their service fees to the physical store. In order to enhance their competitiveness, they can

adjust the price of the on-site service to a lower level than the offline store.

- Can provide relatively flexible working hours for massage practitioners.

(2) Weaknesses

- There is no effective motivation system for masseurs, and staff retention is not high enough.
- Difficult to guarantee better service quality every time. Although some masseurs already have professional qualifications, the professionalism of the massage therapist is not as good as that of a competitor Gongfuxiong, PandaNana, Shufuba etc.

(3) Opportunities

- The government advocates the development of health industry.
- The problem of aging population in China is serious and the proportion of sub-healthy people is large, but the development of health care has not kept pace.
- The overseas massage service O2O market has matured, while the Chinese massage O2O market is in the exploration period or market start-up period.

(4) Threats

- There are many O2O massage startups and they also have similar patterns.
- About the prejudice in the massage industry. people often associate massage with improper service.

3.5 STP (SEGMENTATION, TARGET & POSITION)

3.5.1 SEGMENTATION

According to the massage needs of the customer and other factor like age, the consumption group of massage services can be divided into the following five categories:

- Chronic patients
- Occupational disease patients
- Sub-health crowd

- Postoperative rehabilitation
- Middle-aged and old people

For sake of the requirement of the assignment, only the segment of occupational disease patients is going to be talked. Also, Wuhan is chosen as the objective of this report among its 29 service city.

3.5.2 TARGET

The target market is selected as a 25-45-year-old urban middle-class occupational disease patient in Wuhan. This group of people often just work for about two years or have been professional employees. The reasons for choosing them as target markets are as follows:

- ✓ Because they often have a good educational background, the prejudice against the massage industry will be relatively small. This also helps reduce the psychological pressure on the masseur.
- ✓ They are easy to be found. It is easy to locate shopping malls, surrounding colleges, research institutes, and government offices near the city center using maps.
- ✓ This kind of person's occupational disease is often chronic and long-term. And because of lack of time or reasons for reluctance, they can hardly solve it in a short time.
- ✓ Because of their relatively strong economic strength, massage is affordable for them. Coupled with the high repeat purchase rate of massage, strong membership habits, the company can benefit a lot from this target group.
- ✓ The reason for choosing a central part of the city instead of the outskirts of the city is that central part is easy to arrive and it is safer for masseurs who provided door-to-door service..

3.5.3 POSITION

According to the established target market, Diandao massage O2O platform in Wuhan

is positioned as 'the professional occupational acupuncture treatment service providers around you'. The eleven business districts in the figure below are part of the target districts.



Figure 7. Eleven business districts in Wuhan

Image Source: www.winshang.com/

3.6 MARKETING MIX (7Ps)

3.6.1. PRODUCT (SERVICE)

Provide professional massage services in segments. First of all, classify occupational diseases in this population and determine the types of occupational diseases that Diandao can provide massage services, such as typical cervical spondylosis and "Carpal tunnel syndrome". Since they use computer for a long time and maintain a fixed posture, they may feel numbness, soreness and even distortion of wrist.

As Diandao has accumulated some consumer resources in Wuhan city, it is important to utilise these valuable resources. For example, Diandao can form a customer demand report that is not limited to massage needs and discover profit from it.

3.6.2 PRICE

Diandao has already been a member of the group buying website, the existing price strategy remains to be unchanged. Here are some future suggestions based on the analysis of competitors above. From the current massage O2O platform on the market, most massage O2O platforms only have a single profit model, generally relying on rake commissions for profit. However, When the competition is getting fierce, the price advantage no longer exists, and it may cause the industry to fall into a price war. Therefore, Diandao need to continuously discover new profit points from now on and create profit models.

3.6.3 PLACE

Because it is a service company, its distribution is easier than manufacturing products. At present, Diandao itself is a platform to provide massage service and relying on the group purchase website Meituan which can improve reputation of Diandao. It is hard to find another platform or distribution channel immediately and it will cost a lot. So its distribution just keep as it before.

3.6.4 PROMOTION

Because the massage industry is a kind of service industry, sales promotion and personal selling which adapt to manufacturing products are not suitable for the massage industry. Hence, direct marketing, public relations and advertising will be discussed.

● Direct marketing

Due to the declining mail delivery in China, mailing service flyers are not considered. Telemarketing takes time and effort and does not necessarily result in good sell results. For television shopping, there are many frauds in current TV shopping and consumers doubt about the credibility of TV shopping (<http://news.sohu.com/20100831/>). Internet sales can be pay much attention to. At this stage, there are only Diandao coupons (Figure 8) on Taobao and no online shop of Diandao. However, people are

used to online shopping nowadays especially through the e-commerce platform like Taobao. So, in addition to its own official website, the website page belongs to Meituan, trying to open an online shop on Taobao is a good choice for Diandao. This can focus on publishing shop-related news, coupons and news, to avoid bad businesses destroy the credibility of the company. Participate in online promotions such as statutory holidays such as Spring Festival and Mid-Autumn Festival.



Figure 8. Diandao Coupon on Taobao

● Public relations

October 15th is the "International Blind Man's Day". In September, 1989, the China National Federation issued a notice calling for the celebration of the blind people every year during the year of the blind man's day, in order to live the life of the blind and to reflect the care of the country and the society for the blind (www.cdcpf.org.cn/). So, Diandao can organise or sponsor this activity. The activity in Wuhan is specifically planned as follows:

"International Blind Man's Day"

Objectives: Concern life of blind, listen to the blind world, through activities to let more people know the blind life is not easy and hardship, warm the blind world. Call on the attention of the society to establish such a consciousness in people's mind that blind people, like us, have the right to participate in social activities. They should share the achievements of civilization with us. They are a part of our society, let us

hand in hand with our hands, connect heart to heart, agglutinate love, call true feelings, and strive to create a "care for the disabled" to care for the good atmosphere of the disadvantaged groups.

Slogan: They are part of our society.

Interactive session:

First, Invite masseurs of Diandao who has obtained a professional qualification teach the blind some knowledge of massage. Second, ask participants to experience massage services provided by blind masseurs.

Time : xx / xx / xxxx

Event Location: Near Hubei Provincial Library

Organizer: China Disabled Persons' Federation, Hubei Disabled Persons Federation, Diandao etc.

Activity flow:

Pre-promotion:

- Draw up publicity leaflets and distribute them at the event site.
- Carry out Internet advertising, use Weibo, QQ and Wechat to publicize the activities. Push related news to city users via the targeting function of these apps.

Post-event:

- Reporting activities via major social media platforms, connect with consumer opinion leader to forwarding and commenting activities.

● Advertising

In case of the selected target group is occupational disease patients, so ads should be placed where they often go through.

(1) Launch elevator advertising. Advertising during commuting hours in office building elevators

Elevator advertising script

Picture:

Lens 1: There is a young woman on the sofa watching TV. The desk calendar on the locker flashes. Hey, a masseur wearing a Diandao uniform appears outside the door.

Lens 2: A company's employees have just finished work. A young man still sits at his desk and browses to the Diandao web page. The confirmation page flashed and the young man smiled.

Lens 3: The young man met with the masseur at the door of the house. He smiles and sends the massage therapist to leave. The young woman ran up and hugged the young man. The couple watched each other silently.

Lens 4: Young men and women were sitting by the window in a Chinese restaurant, eating and talking, while young men rub the cervical part of the young woman.

(Voiceover: Happy First Wedding Anniversary)

Advertising slogan: Care more, Diandao, the professional massage service providers around you.

End of advertising

This advertising combine Diandao massage with life scenes of modern urban white-collar workers, based on the anniversary of marriage, appealing to the true emotions of young people, highlighting the convenience of their massage services and the physical relaxation and emotions experience that they can bring to consumers. Its main purpose is to increase brand favorability and increase consumer stickiness.

(2) Participate in job hunting TV shows

Participate in popular job-seeking TV programs as a working company to increase awareness, such as 'You are Hired' and 'Must Belong to You'. By participating in such job-seeking programs, Diandao can increase the company's exposure and visibility, allowing television viewers to quickly remember the company; second, they can recruit suitable employees.



‘You are Hired’

‘Must Belong to

Figure 9. Popular Job Seeking TV Shows in China

3.6.5 PEOPLE

Diandao can make the masseurs who provided massage service standard. masseurs can be equipped with standard uniforms, massage beds, tools, and standardized self-introduction. This helps shape well-regulated and good brand image.

3.6.6 PROCESS

Regulate the process of providing services and guarantee the efficiency. Besides, the masseur should communicate properly according to the customer's status during the work process.

3.6.7 PHYSICAL EVIDENCE

Because Diandao is a virtual O2O company, its visible display is mainly reflected in the masseurs' clothing and tools. This point has already been mentioned among the people, so no more details here . Another part is about physical evidence is on website. The introduction of Wuhan District should focus on the treatment of occupational diseases as much as possible whether on its website or app.

4 CONCLUSION

Massage and related services have transformed from one kind of medical treatment in ancient times to a form of mass consumption. Due to the fierce competition, the massage service market can be further subdivided, so Diandao can Get some competitive advantage.

5 RECOMMENDATIONS

According to the already established target market, the price stays the same as current, a online channel for e-commerce platforms can be added due to consumer habits. The main promotion methods focus on advertising, public relations and direct marketing.

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APPENDIX

Figure 1. GDP in China from 2012 to 2016 (Data Sources: UNSD)

Figure 2. GNI in China from 2012 to 2016 (Data Sources: UNSD)

Figure 3. Modern massage service industry development process in China

Figure 4. Massage service O2O

Figure 5. Competitor Analysis

Figure 6. Diversified Service Model of Zeel Massage

Figure 7. Eleven business districts in Wuhan Image Source: www.winshang.com/

Figure 8. Diandao Coupon on Taobao

Figure 9. Popular Job Seeking TV Shows in China