

China Online Group Buying Industry Report, 2010-2011

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Abstracts

In 2010, Chinese online group buying market emerged. Group-buying websites not only explore more and more product suppliers and consumers, but also expand to second and third-tier cities based on Beijing, Shanghai and other first-tier cities rapidly. In less than a year, the number of Chinese online group buying users registered 18.75 million, and the sales valued RMB1.66 billion.

According to the monitoring of ResearchInChina on major group-buying websites in China, Chinese online group buying market characterizes a low concentration degree. Lashou and Meituan.com took the first and second position by virtue of their first-mover advantages in the market in 2010, with 15.8% and 14.1% shares, respectively. Relying on the huge user base and excellent merchandisers of Taobao Mall, ju.taobao.com took the third position with mail products. In 2011, Taobao's open strategy will threaten Lashou and Meituan.com.

In China, group-buying websites have arisen since March 2010. By the end of December 2010, the number had approached 2,000. According to their backgrounds, group-buying websites fall into four categories.

First, emerging third-party independent group-buying websites, such as Meituan.com, Lashou, Groupon.cn, Gaopeng.com, Manzuo.com, and Didatuan.com. These websites were set up earlier, and they ranked among top ten in market shares. In 2010, they obtained the funds from investors. Then, they project huge capital into the advertising to attract consumers in 2011.

Second, group buying websites subordinated to e-commerce websites, such as Ju.Taobao, 360buy Tuan, Paipai Tuan and so forth. They have considerable high-

quality merchandise resources. They entered the field of e-commerce earlier, so they own a large number of users. They enjoy inherent superiority in group buying sector, which can be shown from the sales share of Ju.Taobao in 2010.

Third, group buying channels of SNS websites and web portals, such as Nuomi, Kaixin001 Tuan and Sina Tuan, and QQ Tuan. Usually, they have more resources in users and information promotion. Nuomi and QQ Tuan was in the ascendant in 2010, with the sales reaching RMB81.30 million and RMB46.30 million respectively, and accounting for 4.9% and 2.8% of the total market sales.

Last, life service websites, such as Dianping Tuan, 58 Tuan, and Fantong Tuan. Compared with the second and third categories, they have fewer users, but more merchandise resources, with concentrated target users. In 2010, Dianping Tuan and 58 Tuan both made remarkable achievements and obtained the sales of RMB103 million and RMB54 million respectively.

Contents

1 BASIC CONCEPT OF ONLINE GROUP BUYING

- 1.1 Concept
- 1.2 Profit Models of Group-buying Websites
 - 1.2.1 Industry Chain
 - 1.2.2 Profit Models
- 1.3 Features of Online Group Buying
 - 1.3.1 Classification of Group-buying Websites
 - 1.3.2 Basic Features of Online Group Buying
 - 1.3.3 Features of China's Online Group Buying

2 DEVELOPMENT OF ONLINE GROUP BUYING INDUSTRY IN CHINA

- 2.1 Big Events
- 2.2 Market Size
- 2.3 Competition
- 2.4 Investment & Financing
- 2.5 Trends

3 KEY ONLINE GROUP BUYING ENTERPRISES

- 3.1 Lashou
 - 3.1.1 Profile
 - 3.1.2 Operation
 - 3.1.3 Competition & Strategies
- 3.2 Meituan.com
 - 3.2.1 Profile
 - 3.2.2 Operation
 - 3.2.3 Competition & Strategies
- 3.3 Ftuan.com
- 3.4 Nuomi.com
 - 3.4.1 Profile
 - 3.4.2 Operation
 - 3.4.3 Advantages & Strategies
- 3.5 24quan.com
 - 3.5.1 Profile
 - 3.5.2 Advantages & Strategies

- 3.6 Dianping.com
 - 3.6.1 Profile
 - 3.6.2 Operation
 - 3.6.3 Advantages & Strategies
- 3.7 Manzuo.com
 - 3.7.1 Profile
 - 3.7.2 Operation
 - 3.7.3 Advantages & Strategies
- 3.8 58.com
 - 3.8.1 Profile
 - 3.8.2 Operation
 - 3.8.3 Advantages & Strategies
- 3.9 tuan.sohu.com
 - 3.9.1 Profile
 - 3.9.2 Operation
 - 3.9.3 Advantages & Strategies
- 3.10 Aibangtuan.com
 - 3.10.1 Profile
 - 3.10.2 Operation
 - 3.10.3 Advantages & Strategies
- 3.11 tuan.fantong.com
 - 3.11.1 Profile
 - 3.11.2 Operation
- 3.12 55tuan.com
- 3.13 tuan.qq.com
 - 3.13.1 Profile
 - 3.13.2 Operation
 - 3.13.3 Competition & Strategies
- 3.14 tuan.sina.com.cn
- 3.15 Groupon.cn
- 3.16 Didatuan.com
- 3.17 ju.taobao.com
- 3.18 GaoPeng.com

Selected Charts

SELECTED CHARTS

Online Group Buying Industry Chain in China
Classification of Group-buying Websites
Sales of Major Group Buying Enterprises by City, Dec. 2010
Comparison between Web Interfaces of Meituan.com and Manzuo.com
Group Buying Events in China, 2010-2011
Number of Group-buying Websites in China, Feb. 2010-Jan. 2011
Baidu Search Index of Group Buying, Mar. 31, 2010-Mar. 31, 2011
Major Manufacturers and Their Shares in Chinese Group Buying Market, 2010
Baidu Search Index of Lashou, Meituan.com and ju.taobao.com, Mar. 31, 2010-Mar. 31, 2011
Baidu Search Index of Manzuo.com, 24quan.com and Dianping.com, Mar. 31, 2010-Mar. 31, 2011
Investment and Financing of Chinese Group-buying Websites, 2010-2011
Market Size of Online Group Buying, 2010-2014E
Sales and Buyer Number of Lashou, Mar. 2010-Jan. 2011
Top 10 Cities in Revenue and Their Proportion for Lashou, Mar. 2010-Jan. 2011
Top 10 Cities in Number of Buyers and Their Proportion for Lashou, Mar. 2010-Jan. 2011
Baidu Search Index of Lashou, Mar. 2010-Mar. 2011
Sales and Number of Buyers of Meituan.com, Mar. 2010-Jan. 2011
Top 10 Cities in Revenue and Their Proportion for Meituan.com, Mar. 2010-Jan. 2011
Top 10 Cities in Number of Buyers and Their Proportion for Meituan.com, Mar. 2010-Jan. 2011
Sales and Number of Buyers of Nuomi.com, Jul. 2010-Jan. 2011
Top 10 Cities in Revenue and Their Proportion for Nuomi.com, Jul. 2010-Jan. 2011
Top 10 Cities in Number of Buyers and Their Proportion for Nuomi.com, Jul. 2010-Jan. 2011
Competitive Edge and Strategies of Nuomi.com
Competitive Edge and Strategies of 24quan.com
Sales and Number of Buyers of Dianping.com, Jun. 2010-Jan. 2011
Sales and Proportion of Dianping.com by City, Jun. 2010-Jan. 2011
Sales and Number of Buyers of Manzuo.com, Apr. 2010-Jan. 2011
Sales and Number of Buyers of 58.com, Jun. 2010-Jan. 2011
Revenue and Proportion of 58.com by City, Jun. 2010-Jan. 2011
Top 10 Cities in Number of Buyers and Their Proportion for 58.com, Jun. 2010-Jan.

2011

Competitive Edge and Strategies of 58.com

Sales and Number of Buyers of tuan.sohu.com, Jun. 2010-Jan. 2011

Sales and Number of Buyers of tuan.sohu.com by City, Jun. 2010-Jan. 2011

Sales and Number of Buyers of Aibangtuan.com, Jun. 2010-Jan. 2011

Top 10 Cities in Sales and Their Proportion for Aibangtuan.com, Jun. 2010-Jan. 2011

Sales and Number of Buyers of tuan.fantong.com, May, 2010-Jan. 2011

Revenue and Proportion of tuan.fantong.com by City, May, 2010-Jan. 2011

Number and Proportion of Buyers of tuan.fantong.com by City, May, 2010-Jan. 2011

Sales and Number of Buyers of tuan.qq.com, Jul. 2010-Jan. 2011

Revenue and Proportion of tuan.qq.com by City, Jul. 2010-Jan. 2011

Number and Proportion of Buyers of tuan.qq.com by City, Jul. 2010-Jan. 2011

Sales and Number of Buyers of tuan.sina.com.cn, Jul. 2010-Jan. 2011

Revenue and Proportion of tuan.sina.com.cn by City, Jul. 2010-Jan. 2011

Sales and Number of Buyers of Didatuan.com, Jul. 2010-Jan. 2011

Top 10 Cities in Sales and Their Proportion for Didatuan.com, Jul. 2010-Jan.2011

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