荒野還是藍海？智能櫃市場在台灣

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雙十一光棍節消費熱度逐年提升，如今已升級為全球最大的網購狂歡節，虛擬購物時代來臨，不能忽視的是隨著電商崛起繁榮的「物流戰場」，粗估計，台灣物流宅配市場於 2019 年時，將達到每年 300 億台幣的規模。

為降低宅配重複配送率，智能櫃因應而生

物流業約有近 20%的宅配重複配送率，因為住戶不在家無法接收包裹，是讓業者相當頭痛的問題，額外人力支出與重覆運輸的成本，使得無人取貨市場在國內外都受到關注，「智能櫃」因應而生。

簡單來說，所謂的智能櫃是宅配人員掃描包裹條碼，將包裹放入智能櫃中，系統會自動寄發簡訊給收件人，讓消費者隨時到櫃取貨，不必經過派件人員或門市人員之手，具有取貨的時間彈性，也可避免與人接觸，降低人力成本還可顧及隱私；即使是透過物流業者配送到宅的包裹，如果收件人不方便收貨，可以選擇轉寄放在住家鄰近的智能櫃。智能櫃的利基點是：讓消費者兼顧隱私與收貨彈性。

在國際上，我們有看到成功持續進行的例子：Amazon 在便利商店、雜貨店或連鎖藥妝店安裝名為「Amazon Locker」的大型金屬置物櫃，網購民眾使用此服務無須額外付費，至今仍持續拓展這種取貨模式；但也有失敗的例子：Google 在 2012 年以 1,700 萬美元收購了 BufferBox，不過 2014 年即正式取消了該項業務；速遞易 2012 年在中國設立五萬多個「智能快遞櫃」，初期免費服務，後來進行收費，但仍無法獲利，已成為智能櫃投資熱潮中的經典失敗案例。

智能櫃在台灣剛起步，尚未引起共鳴

在台灣，智能櫃的熱潮從今年初開始延燒，隨即在 3 月爆發快取寶吸金倒閉事件，從捷運站全數撤退，目前台灣的智能櫃點約一千多櫃，最大的是與全家便利商店與美聯社合作的「掌櫃」，其餘還有工研院的「智取站」、郵局「i 郵箱」與黑貓宅急便的黑貓智取櫃，駐點在郵局、便利商店的特定門市、市政府等各處，並進駐多所大專院校。從年初到年尾，無論是從網路聲量觀察，或是實地走訪勘查，智能櫃並沒有引起太多消費者的使用與討論。

所以，智能櫃市場在台灣究竟是充滿生機的藍海？還是一片荒蕪？

智能櫃業者的人員訓練尚未落實

智能櫃在台灣的執行狀況是雷聲大、雨點小，首先在業者端就出了問題。根據益普索實際測試，整體而言，除了掌櫃用力投入以外，台灣其它快遞業者並沒有準備好發展智能櫃業務，對於自

家的智能櫃業務狀況非常不熟悉，甚至建議消費者不要以智能櫃寄送包裹；其次，內部教育訓練也有待加強，派件人員並不了解智能櫃操作，他們寧願選擇另找時間配送、更改地址配送，或是改送便利商店等慣常的運作模式。不少設置在便利商店的智能櫃早已悄悄撤櫃，多數櫃位則淪於閒置，沒有實際運作。

智能櫃的隱私及彈性收貨並不足以與超商代收抗衡

在消費者端的考驗也不小。相較美國、中國兩大市場，台灣市場還有一個更艱鉅的發展阻礙，台灣遍布 24 小時便利商店，不僅是亞洲之最，也幾乎是全球之冠。便利商店取貨，到底有多方便？舉例來說，PChome 商店街個人賣場與 7-ELEVEN 和全家便利商店合作，可取件的超商數就超過 8200 家。根據資策會產業情報研究所（MIC）調查結果顯示，台灣消費者八成以上喜歡「超商取貨/貨到付款」，新興取貨方式如取貨櫃僅占 0.5%，比例相差懸殊。

智能櫃的前景堪憂。首先，智能櫃挑戰了台灣消費者的使用習慣，到便利商店取貨方便快速，可貨到付款，不在家也可轉送便利商店，提供顧客無法當下取件時的最後一哩路；其次，智能櫃在便利性與取貨彈性上，無法與數量更多、更密集的便利商店匹敵，未來能否持續擴張，形成順暢生態圈仍是未知數；第三，智能櫃不像便利商店可以貨到付款，或發展出其它的區隔化優勢。

便利性不及便利商店，「隱私」成為智能櫃僅存的利基點，然而，便利商店取貨雖讓消費者有隱私顧慮，但多數貨品都會經過適當包裝、或避免敏感品項，隱私訴求尚不足以說服台灣的消費者改變行為。

市場競爭激烈，越來越多業者渴求新藍海市場，取得先機，創造一個革新的互動生態網絡。但是，除非智能櫃發展出更多的特點，例如：根據生活型態發展在捷運站或偏僻地區設櫃，提供更便利的服務；提供不一樣功能的智能櫃（有冷藏功能或大型置物）；否則台灣市場有限，想要從中賺取商機，不僅代價不斐，實質效應還有待觀察。

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Blue Ocean or Wild Desert? Smart Locker Market in Taiwan

Laura Lo, Senior Research Executive, Ipsos

Background

As the popularity of Double 11 day increases year by year, it has become the hugest shopping carnival in the world. With the begin of virtual shopping era, we cannot neglect the battles in the logistic market brought by the E-commerce boom. It was estimated that Taiwan logistic market will reach a scale of 30 billion NT dollars in 2019.

Smart Lockers for Flexibility and Privacy

Logistic companies suffer from nearly 20% of double delivery rate, because residents cannot receive package when they are not at home, which caused difficult problem. Additional human resources and double deliveries costs draw attention in both domestic and international self-pickup market, thus lead to the invention of "smart locker".

Briefly speaking, when a courier scans the bar code on the package, putting the package inside the smart locker, the system would send a message to the receiver automatically, so the package could be picked up by the consumer any time without going through courier or store staff' hands. It is flexible for receiver's time and prevents interactions. Not only cuts down the cost of human resources, but also protects consumer's privacy. Even though it was delivered to a residence by a courier, the package could be re-sent to smart lockers nearby if the receiver is not available. To sum up, the product's strength lies in consumer's privacy and flexibility.

There are successful cases in the international market: For example, Amazon installed big metal lockers- "Amazon Locker" in convenience stores, grocery stores, and chained pharmacies. People who purchase online need not to pay additional fee for using and Amazon is still expanding this self-pickup model. However, failures are also provided: Google took over Bufferbox for 17 million dollars in 2012, but canceled the service officially in 2014; Sposter (速遞易) set up 50 thousand smart express lockers in China in 2012, whose service was free initially. After started to charge, the company could not gain profit and had become the classic case of business failure in the smart lockers investment boom.

Smart Locker Has Great Potential but Yet to Become Popular

In Taiwan, the smart locker trend started from the beginning of this year, and after Catch Power (快取寶) collapsed and being accused fraud in March, retreating from all MRT stations, smart locker market encountered a big shock. Currently, more than 1000 smart lockers were remained in Taiwan. Palmbox (掌櫃) has the biggest market share, which cooperates with Family Mart (全家便利商店) and Simple Mart (美廉社). Rest of the companies include Industrial Technology Research Institute's iPickup (工研

院智取站), Chunghwa Post Company's imailbox (i 郵箱), and t-cat's smart self-pick locker (黑貓智取櫃). The smart lockers are installed in post offices, certain convenience stores, the city hall and many college campuses. Through observations from social listening and fieldworks, smart lockers did not lead to many usages or discussions within consumers from the start to the end of the year.

Therefore, is Taiwan a blue ocean for smart lockers? Or a wild desert?

Implementing Employee Training is the First Step

The execution of smart lockers in Taiwan was all sizzle but no steak. First and foremost, according to Ipsos's test, overall, besides Palmbox, which puts many efforts in smart locker business, other express companies in Taiwan are not ready to develop. Most companies are not quite familiar to their own smart locker business and even suggest consumers not to use them. Besides, internal trainings should be improved. Couriers do not understand how to manipulate smart lockers, so the usual pattern is delivering in another day, changing the address, or sending the package to the convenience store instead. Few smart lockers in the convenience store had been removed quietly and most lockers were idled, not being operated.

The Main Challenge: Taiwanese Convenience Stores with the Highest Density in the World

Challenges from the consumers is also considerable. Comparing to 2 huge markets-U.S. and China, Taiwan faces a more difficult development obstacle. The 24-hour convenience store in Taiwan is not only the best in Asia, but also the world. To what extent is the convenience to pick up in convenience stores? For example, PCstore cooperates with 7-ELEVEN and FamilyMart, making the number of stores providing pickup service above 8200. According to MIC's survey, 80% customers in Taiwan like convenience store's pickup service or COD. However, emerging pick up methods such as pickup locker stands for only 0.5%. There is a huge gap between the former and the latter.

The future of smart locker is skeptical. Firstly, it challenges Taiwan's consumers' usage habit. Picking up in convenience store is fast and convenient- It allows COD and re-sent service when consumers leave home, serving as the last mile for those who cannot receive. Secondly, smart lockers cannot be compared to convenience stores which is larger and tenser in number. Whether its market would keep expanding and form business ecosystem in the future is unknown. Thirdly, smart locker does not provide COD like convenience store. Furthermore, it does not develop other segment advantages.

Because smart locker is not as convenience as convenience store, privacy is the last niche. However, although picking up in convenience store may rise consumer's privacy awareness, most packages were wrapped properly or avoid showing sensitive item names. Privacy claims are not enough to persuade Taiwan's consumers to change their behaviors.

Competition in the market is intense, while more and more companies try to find blue ocean to grasp the opportunity of creating new innovative ecosystem. Smart locker should develop more features, such as installed in MRT stations or distant areas based on consumers lifestyle, providing more convenient services or distinct functions like freeze or huge storage. If not, the smart locker market of Taiwan will still be limited. For those who want to profit from it, the cost is high and actual effect remains to be seen.

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