

# 零售商 40 年成長回顧及未來趨勢

文 | Ipsos Retail Performance

編譯 | June Chen 益普索公關行銷專員

益普索在市場研究及消費者洞察的專業已經是全球知名領導者，過去四十多年益普索也伴隨著消費者及品牌們一起經歷零售業的改變及成長。在這邊我們將分享過去四十年來在英國所觀察到零售商的變化，以及未來的發展趨勢。

## 1975 – 1980 年：經濟的衰退及行銷的崛起

比起戰後時代，60 年代的繁榮帶給購物方式很大的改變。消費者有了比以往任何時候都還要多的選擇，加上汽車開始普及，人們也開始願意到更遠的地方購買他們想要的東西。

1975 年，當 Ipsos 剛成立的時候，英國正處於經濟衰退的困境，零售商之間的競爭變得激烈。消費者追求越來越低的價格，也促使了沒有過多裝飾的暢貨中心 ( outlet ) 的興起。

這個時期的零售商，正從只是簡單地替製造商展示及銷售商品的階段轉型，開始試圖積極影響消費者的選擇。而行銷方面主要是透過廣告和促銷活動的方式，幫助品牌建立獨特的身份，零售商對於顧客的需求也有了較多的瞭解。

此外，以數據資料為基礎的行銷方式慢慢形成，零售商開始建立自己的客戶資料庫，加以作區隔分析，並以不同客戶族群會感興趣的溝通方式，向各族群展示他們可能會購買的商品。

## 1980 – 1990 年：收割成果

在愁雲慘霧的 70 年代，許多品牌為了應對當時的經濟衰退，透過合併、收購和商店開發以鞏固在市場中的地位。在之後的十年，零售業終於出現了明顯增長。

零售商店在這個時期是市場上最主要的購物管道，同時零售商也開始負責物流、品質控制以及與供應商談判。他們意識到消費者若在店內有不錯的購物體驗，經常能夠促使業務表現提昇，因此零售商開始注重商店的樣貌，投入了大量資金在商店設計及商店位置，並轉向更具規模的品牌商店。

## 1990 年代初期：又回到了經濟衰退

此時，英國再次陷入衰退，帶來了更多的經濟困難。面對高利率和房價下跌，消費者都縮緊荷包，零售商只得跟著改變。為了讓消費者能省下更多錢，零售商降低成本，在營運和管理的方式有了許多改變，比如說這個時候就發展出品類管理。

此外，購物中心 ( shopping centre ) 和市郊零售廣場 ( retail park ) 興起，加上中央及地方政府

的支持，為零售商帶來了更大的經濟規模，讓整個社會也更加依賴汽車。

零售商開始透過座談會及分析交易情形來瞭解顧客的態度和動機，數據行銷變得更加複雜。此時商家也開始大量發行會員卡 / 集點卡 ( loyalty card )，會員卡 / 集點卡除了能提供獎勵給顧客，更重要的是，店家可以從中瞭解顧客的消費行為。

### 1990 年代中期 – 2008 年：太平時期

零售業被認為是在這時期將英國帶離低潮期的重要角色。隨著消費者的支出增加，推動了整個經濟，零售業也成了代表性的成功故事。另外由於信用消費的形成，消費者在此時已經可以享受更高的生活水準，這樣的現象也反映在奢侈品的銷售數量上。

整個市場的整合持續進行，某些零售商開始主導市場，例如，在 1971 年時整個英國市場有約 29,000 家零售商，而到了 2000 年，前 100 名的零售商就已經佔據市場上 70% 的業績，其中許多零售商也開始進入國際市場。

這個時期也開始有了線上購物。在 2006 年時，線上購物已佔零售銷售額的 3%，零售業開始發展了整合數據與溝通的技術。線上購物提供給消費者更多選擇，也意味著在零售業界的市場中，主導力量已漸漸從零售商轉移到消費者了。

### 2008 年 – 2013 年：金融海嘯 & 緩慢的復甦

這個時期被許多人描述為「有生以來最慘烈的衰退」，直接震撼了消費者的信心。隨著房價暴跌，銀行不願意放貸，人們減少了支出，尤其是非必需品的花費。

一般家庭的預算緊縮導致消費者開始被提供折扣的零售商吸引，而這時期無止盡的優惠以及促銷活動也讓消費者對於他們要買的商品越來越挑剔。

零售商開始知道若要保持競爭力，就必須提供全方位管道的購物方式，除了傳統商店以外，也包括網站、應用程式購物管道，因此許多公司在此時都致力於跟上這波數位化革命。而緩慢的經濟復甦加上轉型的壓力，零售商此時只得降低供應商的成本。

### 2013 年 – 2015 年：經濟好轉時期

到了 2013 年，經濟逐漸放晴，然而消費者還沒有意識到經濟好轉的跡象，都還停留在針對緊縮時期必須斤斤計較的意識。超級市場開始失去青睞，反倒是市區裡的販賣小量商品的小超商在此時大量增長。

在此期間，許多零售商因為害怕跟不上腳步而被消費者遺忘，開始積極了解消費者的數位需求，改善線上購物環境，以提供無障礙的全方位購物管道。消費市場的權利天秤已經完全地朝向消費者傾倒，品牌為了要讓消費者更有參與感，無論是透過社群媒體或是客製化訊息，都必須絞盡腦汁地擠出越來越有創意的方式來吸引消費者。科技也開始能夠記錄消費者在商店裡的消費行為，讓零售商能夠更有效地作抓住目標族群的注意力。

## 2015 年 – 未來；零售業之展望

行業變化得如此快，我們只能預測一兩年後會發生的事。如 Uber 和 Air BnB 這類應用程式的發展，點對點 ( peer-to-peer ) 的線上預約租車及住宿模式等，一下子就徹底改革了傳統的商業模式。那下一步將會如何變化呢？我們認為不久的將來，零售商將會：

### 全面以消費者的需求為主導

零售模式比過去複雜許多，向群眾銷售的日子已經過去，取而代之的是，企業必須投入大量資源來蒐集數據，以了解消費者的想法和購物行為，並利用智慧數據來發展客製化服務。這樣的模式也讓品牌能夠即時地與消費者溝通，並提供客製化的促銷與訂價來吸引消費者。

在激烈競爭的市場中，企業將發展出超越當前積點的方式，讓消費者能更快地因為頻繁拜訪商店及高消費額獲得實質獎勵。

### 是一種生活方式，而非一個地方

對於大多數的消費者而言，時間當然也是很珍貴的商品之一，因此零售商会思考如何提供消費者更方便的服務。同時，零售、餐飲旅館、休閒、教育、甚至遊戲產業之間的界線將變得越來越模糊。實體商店受到線上購物造成的影響會越來越大，並會重新被塑造成類似娛樂、教育或社交中心的新身份。

### 更少的障礙，更多的訂單

由於「物聯網」的出現，某些購物的實際行為會慢慢被消除。日常家用設備將直接連結應用程式以方便消費者重複購買特定商品。例如，咖啡機可以檢測膠囊會在什麼時候不夠用，並在沒有使用者直接參與的情況下向供應商下單訂購膠囊。

### Location, Location, Location!

除了花時間尋找購物中心裡的最佳位置之外，零售商也必須要與數位「房東」( 如 Google 及 Amazon 等線上購物平台 ) 合作，提高搜索引擎結果的能見度。同時，由於線上購物的趨勢持續成長，商家將只會爭取最熱門的地點，而一些邊緣的購物區將會轉作為如辦公室或住宅、社區等其它用途。

#### Ipsos Marketing 益普索行銷研究

Ipsos Marketing 是益普索集團旗下致力滿足客戶創新與品牌增長需求的事業體，根據不同的市場調查需求，我們再區分成：創新與預測、市場與品牌宣傳、醫療和質化研究等四大領域。我們的行銷研究專家專門協助企業夥伴把市場趨勢轉換成產品競爭優勢，並持續提供創新的市場研究模組，幫助夥伴更有效運用管理市場研究預算。我們也善用利用科技和研討會，結合不同的資料整合知識，幫助企業獲得即時的市場洞察。

更多的資訊，請參考 <http://www.ipsos.com/marketing>

或洽詢我們的研究團隊

執行總監 Ruth Yu 于泳洳

02 2701-7278 ext.130 [Ruth.yu@ipsos.com](mailto:Ruth.yu@ipsos.com)

# Looking Back On 40 Years Of Retail

## – Top Tips For The Future!

Ipsos Retail Performance

---

We are known throughout the world for being a leader on market research and customer insight. To celebrate our 40 years in the industry, this four-part blog series looks at how the retail landscape has changed – and what the future has in store.

### 1975 – 1980: Recession and the rise of marketing

The relative prosperity of the 1960s compared to the austerity of the post-War years brought with it seismic changes to the way people shopped. Consumers now had more choice than ever and, fuelled by the rise in car ownership, they began to travel further to get the goods they wanted.

By the time Ipsos was founded in 1975, the UK was in the grip of recession and competition between retailers had become fierce. Shoppers were now demanding ever-lower prices, spawning the rise of no-frills outlets.

This era was also characterised by a shift from retailers simply displaying and selling products on behalf of manufacturers both trying to actively influence consumer choices. Marketing, mostly in the form of advertising and promotional campaigns, helped brands forge distinct identities and retailers were able to gain additional insight into customers' needs more than ever before.

In addition, the seeds were being sown for data-driven marketing as retailers built their own customer bases. This enabled them to segment audiences and target them with relevant communications, showcasing products they were likely to buy.

### 1980s – 1990s: Reaping the rewards

After the gloom of the 1970s, the following decade was marked by a period of unprecedented growth in the retail sector. Brands had responded to the recession by consolidating their place in the market through mergers, acquisition and store development initiatives.

At the same time, retailers became the dominant force in the shopping channel, moving branding away from manufacturers and taking responsibility for logistics, quality control and supplier negotiations.

Of course, this also meant that retailers paid more attention to how a store looked as they realised that positive shopping experiences often translated into sales. Consequently, they invested heavily in design, ranging, branding and location and moved towards more formulaic, branded shops

Next week, we'll look at how the economic slump of the early 1990s led retailers to restructure their operations, paving the way for market consolidation, international expansion and on-line shopping

### **Early 1990s: Back into brief recession**

The new decade brought with it more economic hardship as the UK was plunged into recession again. Faced with high interest rates and falling house prices, consumers tightened their belts and retailers did the same. In a bid to cut costs, and pass savings on to customers, retailers looked at the supply chain, making changes in operations and management as well as developing new strategies such as category management.

In addition, the rise of shopping centres and out-of-town retail parks gave retailers greater economies of scale. These developments, facilitated by the commercial property sector and supported by local and central government, led to a more car-dependent society.

Data marketing, which was in its infancy in the last decade, became more sophisticated as retailers analysed transactions and used focus groups to find out about customers' attitudes and motivation.

There was also a proliferation of loyalty cards, which not only offered rewards for spending but also gave retailers an insight into customers' behaviour.

### **Mid 1990s – 2008: The halcyon years**

Retail was credited with dragging the UK out of recession. The sector became a national success story as consumer spending fuelled the economy. Thanks to the availability of credit, people could now enjoy a higher standard of living and this was reflected in the number of 'mass luxury' goods available.

The process of market consolidation continued at this time, with some retailers taking a dominant position, for example, by the year 2000 seventy per cent of UK sales were generated by the top 100 retailers compared to 29,000 retailers in 1971. Many retailers also moved from national into international markets.

This period also heralded the start of online shopping. In 2006, it accounted for three per cent of retail sales and the industry developed strategies to integrate information and communication technologies. Online shopping also meant power shifted further from the retailer to customers, offering them more choice and better value.

### **2008 – 2013: Recession and slow recovery**

Described by many as the 'worst recession in living memory', the most recent economic down turn, shook consumer confidence to the core. As house prices plummeted, and banks became reluctant to lend, people reduced their spending, particularly on non-essential goods.

Stretched household budgets saw consumers being drawn to discount retailers while the endless stream

of offers and promotions meant they could be more discerning about what they bought.

Online shopping was now the norm and successful retailers knew they must adopt an omni-channel approach if they were to stay competitive. This included websites and apps, as well as traditional store formats. Some firms, however, struggled to keep pace with the digital revolution and suffered as a result.

As the recession continued to bite, retailers focused on making their own savings by driving down back-end supplier and head office costs.

### **2013 – 2015: Fighting back**

By 2013, there were signs that the economy was on the up – however, memories of the austerity years remained and many shoppers were as budget-conscious as ever.

Once all the rage, superstores fell out of favour and instead, the supermarkets invested heavily in small convenience shops in towns and cities.

During this time we also saw retailers once again trying to meet customers' digital demands by providing a seamless omni-channel experience. Some remained cautious about technology but soon found themselves left behind.

The balance of power has tipped firmly towards the consumer and companies have to come up with ever-more creative ways of increasing engagement, whether through social media or personalised messaging. Technology allows retailers to monitor online and in-store behaviour to target customers more effectively. They are adapting to survive.

### **2015 and beyond: Star-gazing into the future of retailing**

Retail experts now agree that the industry is changing so rapidly that we can only look one or two years ahead. We have seen digital technology enable newcomers to overhaul conventional business models – for example, Uber and Air BnB have changed the way people book taxis and accommodation using apps, online booking and peer-to-peer networks. But what's next? Below are just some of the things retailers can look out for in the near future:

#### **It's about people, not numbers**

The sector is more sophisticated than ever and retailers are investing significant resources into understanding how people think, behave and shop. The days of selling to the masses are long gone and instead firms are developing personal services using big or smart data gathered from online behaviour. This allows them to entice customers with timely communications, promotions and personalised pricing.

In a fiercely competitive market place, customers will soon be given genuine rewards for frequent visits and higher spending, in a way that moves beyond the current reward points model.

### **A lifestyle, not just a destination**

Time is of course, a precious commodity for most consumers so retailers will look at ways of making their services more convenient. At the same time, the lines between retail, hospitality, entertainment, education and even gaming will blur so they become part of our blended leisure time. Stores, which may have suffered due to online shopping, could forge new identities as an entertainment, education or social hubs.

### **Less hurdles, more orders**

The next few years will see some of the mundane aspects of shopping removed thanks to the so-called 'Internet of Things'. Everyday devices will be fitted with software, which facilitate repeat purchases. For instance, a coffee machine can detect when capsules are running low so an order with the supplier can be made without direct involvement from the customer.

### **Location, location, location**

As well as spending time securing the best units in shopping centres, retailers will also have to work with digital 'landlords' such as Google and Amazon to increase visibility in search engine results. Meanwhile, as the trend for online shopping continues, marginal shopping areas could be used for other purposes such as housing, offices and community buildings as retailers focus on key stores in primary locations.

## **Ipsos Marketing**

Ipsos Marketing helps clients to transform insights into their competitive advantage. Our teams of specialists offer innovative contractual models to better manage Market Research money. They distribute insights real-time within clients' organizations by leveraging technology and workshops. They integrate knowledge by combining various sources of insights.

For more information, visit us online at <http://www.ipsos.com/marketing>

or contact our research team:

Ruth Yu, Executive Director

+886 2 2701-7278 ext.130 [Ruth.yu@ipsos.com](mailto:Ruth.yu@ipsos.com)