

一股不可忽視的經濟模式： 宅經濟商機 (Stay-at-Home Economy)

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什麼是宅經濟？

「宅」一詞源自於日語的「御宅族」。近年來因為網路購物平台蓬勃發展，提供了更便利的購物環境與服務，人們無論是上班或是購物，都不再侷限於特定模式或地點。網路媒介提供消費者更快速、更方便的消費方式，使得消費者在家消費的機會增加，外出購物的機率減少，改變了傳統的消費模式。



宅經濟的轉變

越來越成熟的雲端技術，不僅形成新的購物行為，也影響了人們舊有的工作模式。在家工作即是很明顯的例子，現今人們在家中也能輕易創業，例如：寫作、多媒體創作、攝影和翻譯等宅代工，以及在家投資和買賣的宅交易等，不同於傳統行銷模式，年輕人或小資本創業者於此有更多的機會實現夢想。

隨著「宅經濟」的興起，企業需針對新的改變做出因應，至於該如何調整出適當的行銷策略，行於前端的市場研究扮演著相當關鍵的角色。以下我們將探討，在不同的「宅經濟」環境下，該如何應用不同的市場調查，協助企業調整策略。

1. 網路訊息傳遞快速且廣

網路購物平台已經成為消費者購物時的重要管道。除了提供便利貨物運送外，網路購物平台更提供了消費者重要的產品訊息參考，消費者在平台上能輕易比較不同品牌的商品及價格，進而尋找到最適合的選擇。

透過網路，消費者能更容易得到使用者經驗分享及相關產品討論，尤其這一兩年越來越夯的 Youtuber 與直播主，在自己的 Youtube 頻道或直播平台分享開箱文，透過影片方式，消費者更能得到完整的產品訊息及使用者經驗，不再侷限於靜態式的圖文內容。

於此同時，消費者口碑、討論及訊息散播都在持續進行。消費者成了品牌在網路上的行銷經理，一條評論，一篇博文或產品評價都會在網路上成為永久的記錄，並隨時可能在 Google



或 Yahoo 等搜尋引擎中顯示出來，有時候不了解真實情況的消費者，也可能誤以為錯誤資訊和謠言為真相。

因此企業更需要時時刻刻注意自身產品或服務在網路上的評價與聲量變化。透過監控社群媒體 (Social Media)、網路論壇、部落客文章或是新聞文章下的討論串，得到預警以做出因應，企業運用社群聆聽 (Social Listening) 可以簡單快速地獲取消費者資訊，包括從新產品上市，到競爭分析，危機管理，品牌追蹤等資訊，並可以確定品牌的主要影響者，擁護者和反對者。

2. 不僅僅只有虛擬通路，實體通路也能加入

現今零售通路的業者，也因應「宅經濟」的興起，紛紛推出自有網購平台，不過也因此容易被消費者刻板地認知商品種類多寡或價格上不如以電子商務為主的網購平台來的有競爭力，另外甚至會出現該網購平台的知名度不如本身實體通路的情形，然而，如此就代表這些零售通路不適合經營虛擬通路嗎？其實不然，根據過往的市場研究發現，多數消費者的購買路徑 (Path to Purchase) 中，在實體通路上的比較與體驗仍是必要的，特別是針對高單價或是需要實際體驗經驗的商品，如：影音視聽產品或家飾家具等。有很多情況是，消費者於實體通路體驗後，再回網路上比較價格才下單購買，因此零售通路業者如何有效地將自身兩種通路整合搭配將會是一個重要的課題，如：消費者可在實體通路看完商品後，在廠商的網路商店購買可以得到更多的折扣、保固期優惠或是完整的售後服務等。

因此零售通路企業需透過完整規劃的市場研究來重新檢視目前客戶的消費路徑 (Path to Purchase)，並結合消費者的網路行為，架構出整體購物流程中，虛體與實體通路所扮演之角色，以調整出更符合消費者行為之銷售策略。

3. 居家休閒娛樂的機會增加了

現今由於經濟低迷等因素，使得許多消費者傾向於宅在家，而不願出門從事休閒活動以節省開支，因此在家進行休閒娛樂的機率變高了，如：打電視遊樂器、卡拉 OK、線上租看影片、漫畫等。根據我們的觀察，由於居家客廳休閒活動的興起，出現了下列消費者行為的改變。

- 對視聽影音的規格需求提高了：



消費者減少了因外出所產生的消費，相對地想要在家中得到更好的視聽享受，因此對於視聽設備的考慮因素，如：液晶電視、喇叭、電腦配備等，不再像以往將價格便宜作為第一考量，產品功能或外型設計的考慮比重逐漸提高，因此相關廠商應透過更進一步的與消費者對話，以深入他們居家娛樂的想法與需求，如：可透過拜訪目標族群的家中進行訪查，除調查消費者意見外，也實際觀察使用行為及居家環境，進而調整出更符合居家娛樂的宣傳方式來與消費者溝通。

- 互動式網路直播平台成了另一種消費者口碑傳播管道：

近年來互動式網路直播平台的出現，當紅直播主透過即時轉播的方式來進行新產品的開箱、使用心得分享等活動，這樣的方式形成了另一種口碑分享，關注的網民看到了其他消費者的實際體驗及心得，進而產生的購買意願。現今甚至有直播主與企業有商業配合，成為另一種行銷模式。

- 網路廣告接觸頻繁：

現代人在行動裝置上從事活動的頻率大幅增加，無論是購物或追劇等，對於手機已是高度依賴，甚至在家中，手機的使用頻率與時間都高於電腦。然而，一般消費者對於廣告的出現是相當反感的，因此應以何種方式呈現廣告，與消費者溝通，且不造成消費者負面觀感，亦是企業的重要課題。通常來說，獎勵型廣告的效益要較一般橫幅或是蓋版廣告來得高，除了避免消費者過快地關閉廣告外，也可以更進一步拓展線下活動，與消費者互動。

另外近年來的消費者研究發現，在購物旅程中，消費者越來越關注社群媒體上的廣告，但其廣告與一般傳統媒體廣告相當不同，例如：社群媒體上的廣告在秒數上的限制不如電視廣告來得大，但是消費者卻可以輕易地關閉廣告，因此廣告必須在限制秒數之內，有效地透過故事內容和情節呈現，讓消費者有持續看下去的動力。企業針對社群媒體廣告運用的方式也相當多元化，例如：以微電影或互動式廣告來增加消費者的參與意願。

4. 虛擬實境 (Virtual Reality , VR) 能增加消費者在虛擬通路的實體體驗

一款當紅的 AR App —— Snow，創造了相當大的下載量，虛擬與實體的結合，提供了消費者不同的體驗。VR 利用電腦模擬產生一個三維空間的虛擬世界，提供使用者關於視覺等感官的模擬，讓使用者感覺仿佛身歷其境，因此應用的範圍更為廣泛，根據 Goldman Sachs Global Investment Research 的研究分析，預計擴增與虛擬實境產業的軟體應用將在 2025 年達到 350 億美元的產值，其中可分成 B2B (醫療照護、工程、房地產、零售、軍事、教育) 與娛樂應用 (電玩遊戲、直播賽事、影視娛樂) 兩大類。

將來 VR 家用設備的普及化，讓消費者不出門就能感受到商品或服務設計概念，從而有更深的消費者體驗，企業可進一步觀察未來走向。

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

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The Next Big Trend: Stay-at-Home Economy

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What Does “Stay-at-Home” Mean?

Originally a Japanese pop word referred to “geeks”, the word “Otaku” has transformed and has been broadly known in Taiwan as “people who stay at home”. Thanks to the rapid development of online shopping industry, it is common for consumers nowadays to switch among different purchase channels. The Internet has provided consumers a faster and easier way to get things they need, and changed the traditional shopping environment and reduced consumers’ trips to stores.



Transformation of “Stay-at-Home” Economy

Internet technologies have not only formed the online shopping behavior, but also changed the way people do their work. “Working at home” is a good example of the impact of the Internet. It is now easy to conduct work such as writing, multimedia working, photographing, translating, investing and trading at home. Comparing to the traditional working-in-office mode, it is more likely for young people and entrepreneurs with little capital to fulfill their dreams at home.

Moreover, companies need to respond to the consumer behavioral change resulting from the stay-at-home economy. The front-line market research plays an important role here. We purpose 4 key observations, to help companies adjust their strategies under the trend of stay-at-home economy.

1. Fast and widespread information

Online shopping has become an important shopping channel for the consumers. In addition to the convenient delivery, online shopping platforms provide abundant information for consumers to evaluate brands and products, and make a favorable choice.

Through the Internet, it is easy for consumers to obtain information about others’ product using experience. The rise of YouTubers and livestreamers, who film or stream videos about their product experience, makes it even easier for consumers to know what a product is about, without the limitation of photos or words.



Meanwhile, consumers' words of mouth are continually spread out on the Internet. The consumers have become an online brand's marketing manager. A comment, blog post or review on a product will permanently be there on the Internet and being searched by Google or Yahoo users. On the other hand, consumers who are not familiar with the product are sometimes led to rumors or wrong information.

In that sense, companies need to be aware all the time of the reviews and share of voice of their products. By applying the method of "Social Listening", which includes monitoring the discussion on social media, online forums, blog posts and news comments, companies get to know about what consumers think about their products. From new product launch to competitor analysis, risk management to brand tracking, Social Listening help companies to gain critical information online, and know which crowds the main supporters and opponents are.

2. It's Not Just About Online

In response to the rise of stay-at-home economy, most retailers have launched their online shopping websites. However, consumers have a stigma that product price and choices in retail-based online stores are not as competitive as on online platforms which exclusively focus on e-commerce. Besides, some online shopping websites don't have the same awareness as its retail channel. Does that mean these retailers should not go online? Not exactly. Based on the past market research, most consumers still consider retail stores as an influential part in their "Path to Purchase", especially for high-end products or products that require using experience, such as audiovisual products, furniture, and so on. In fact, it is common that consumers go to retail stores first to try out and decide which product they want to get, and then go back home and turn to online stores, and pick up the product with the best bargain. Therefore, it is important for retailers to integrate both the physical and online stores, to give consumers no incentive to switch to other retailers. For example, retailers can offer consumers price discounts, longer warranty or better after-sales service for consumers who have visited the physical store and purchased from the same online retailer.

What retailers need now is an overall market research to help them investigate the consumers' "Path to Purchase", and to develop a strategy that integrates the roles of both physical and online stores throughout their consumers' purchasing behavior.

3. Time for Home Entertainment

Due to the slow economic recovery, many consumers tend to stay at home rather than going out, so that they can save up. The demand for home entertainment, such as TV video games, karaoke, online movies and comic books, has therefore increased. The key results from this effect are:

- Demand for high-standard audiovisual products



Consumers reduce the spending outside of their home, and expect better-quality entertainment at home. Instead of getting TV, speakers or PC components that are merely cheap, they care more about product looks and functions. Companies should conduct survey to get consumers' ideas of the products. Home interview is a good method in this situation, for not only consumers' opinion is heard, but also the household environment, in which the AV equipment is set up, is observed to portray consumers' needs for the home entertainment products. Based on the observation, companies could develop marketing strategies that better fit the needs of these consumers.

➤ Live broadcasting is the new words of mouth

With online streaming getting popular, the broadcasters, or streamers, who share their first-hand product using experience, have become an important source of the online words of mouth. Companies should use the influence of these popular streamers, to approach the target consumers and raise their awareness of the brand.

➤ Online ads everywhere

People highly rely on their mobile devices. They use their phone for online shopping, watching TV series, and other activities. Even at home, sometimes the time using the mobile phone is higher than using the computer. On the other hand, people hate seeing ads on the phone. To present ads in a communitive yet not annoying attitude is the next big issue for the advertisers. In general, reward-based ads are more likely to accepted by consumers than banner or interstitial ads, and raise higher attention than the latter. Not only can they avoid consumers turning off ads soon, but also allow marketing activities to go from online to offline.

In addition, recent research shows that consumers pay more attention on social media ads than other ads. Social media ads work differently with the traditional TV ads; there are not as many limits in terms of film length, yet consumers may just choose to turn off the ads. Therefore, the advertisers need to learn to tell stories that grab consumers' attention in short amount of time. And besides traditional film ads, short movies and interactive ads are also innovative approaches to raise consumers' awareness.

4. Apply VR to Shopping Experience

Snow, an AR App that allows users to experience the integrated "virtuality", has gone popular and gained high number of downloads. Similar ideas apply to VR products that illustrate a virtual 3D world on the computer and provide users a sense of reality, as if users are in the world shown up. Based on a survey conducted by Goldman Sachs Global Investment Research, the output of AR and VR industry will increase to more than 35 billion USD by 2025. The techniques are estimated to broadly applied on the B2B industry, including medical care, construction, housing, retail, military and education; and the entertainment industry, including video games, live broadcasting and movies.

Soon when home VR devices become popular, consumers will be able to experience the complete products and services at home with the help of new technologies. Companies should pay attention to the trend and think forward to plan for success.

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