

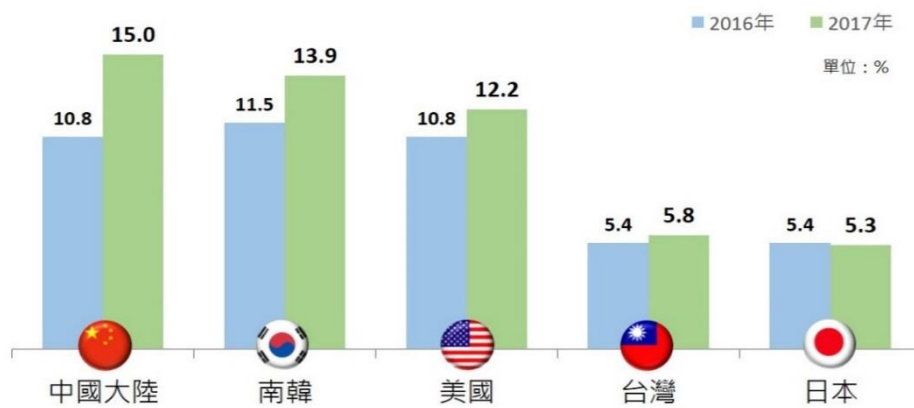
在數位浪潮下，品牌如何重新贏回消費者的心？

文 | Anita Yang 益普索研究經理



近年來電子商務的快速崛起造成對實體通路業者之巨幅衝擊。從經濟部統計處最新公布的經濟情勢顯示，各個國家透過網路購物占零售業營業額之比重逐年升高。因受惠於網路環境佳與高普及之智慧型手機，增加了線上購物的方便性，也使得台灣電商市場的銷售金額越來越高。

各國零售營業額網購佔比



資料來源：經濟部統計處

此外，從資策會產業情報研究所（MIC）針對消費者網購行為的調查亦發現國內消費者的日常購物行為，整體網購頻率已逼近在實體通路之購物頻率，在 10 次購物行為中，平均約有 4.5 次是透過網購通路進行購買行為。

但令人值得玩味的是，在普遍認為電商是未來趨勢的當下，為何電商網站紛紛開設起實體店面？從 Amazon 在 2015 年開設首間實體書店，緊接著佈局生鮮超市；阿里巴巴進軍 3C 連鎖通路、接連入股、併購超市、百貨、大賣場，不難發現兩大電商巨擘已體認到實體通路仍有其不可替代性。

原先以傳統實體通路為主的零售品牌，面對消費者行為的改變、電商的挑戰與業績侵蝕，又該如何因應數位化時代下的轉型課題？美國梅西百貨關閉百間實體店面，強化線上銷售及行動購物、ZARA 致力於整合線上電商平台與線下實體店面、神腦國際積極佈局全通路(omnichannel).....等品牌之市場動作不難觀察到傳統零售通路亦開始積極發展線上通路。

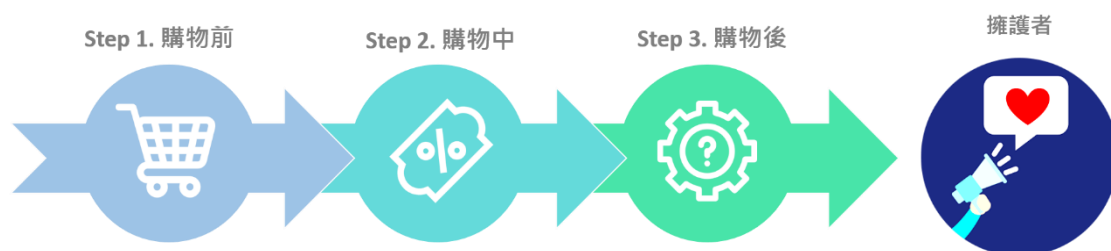
無論線上電商或實體零售業，似乎雙方都認清了整合虛擬與實體通路的必要性，均朝向全通路(omnichannel)之發展策略。

- 電商經營者發現，雖然網路購物時瀏覽商品的方便性高，但能親手觸摸的感覺更有溫度，線上、線下的消費行為難以切割，最終仍需無縫連結，若欲使營收再為增長，則需藉由實體店讓消費者直接體驗，以補足網購缺乏的部分。
- 實體零售業除了思考數位化的轉型，也逐步提升實體店面的消費體驗，透過結合線上線下的銷售模式，希望讓傳統的零售業在數位浪潮、行動優先的時代下重獲消費者的青睞。
- 尤其針對特定商品或新產品，如果消費者之前沒試用/使用過，在線上下單的機率偏低，且在實體商店單筆交易之金額常大於網購金額、成交率也往往更高。儘管台灣網購之普及率相當高，但進一步觀察消費者實際之購物行為，實體店面仍是重要的購物管道。

推動全通路(omnichannel)的商業模式，需以消費者為中心(C2B)，將線上、線下，包括商品、客戶、服務等面向皆串聯起來，將顧客在網路上的購物行為與實體店面的體驗結合在一起，讓顧客在不同的通路上皆能享有更完美的購物經驗。

為了能創造完美的顧客體驗，消費者購物旅程中與品牌的每一個互動，無論是在實體店裡、電話中或在網路上，品牌在每個接觸點都要能滿足顧客的關鍵需求。如果你的品牌/產品的網路口碑好，吸引顧客上門購買，但在實體店裡的服務卻讓他們大失所望，客戶也可能會因此而流失。

消費者購買旅程-接觸點檢視



1. 購物前：

- 搜尋產品相關資料
- 比較產品內容/服務/價格
- 決定購買通路

2. 購物中：

- 在實體店內會使用手機上網比價、查詢使用評價，或徵詢家人朋友的意見。
- 是否容易找到特定商品
- 商品選擇障礙
- 現場人員服務

- 結帳等待時間長短
- 付款方式、支付的多元性
- 現場取貨或宅配

3. 購物後：

- 售後客服的便利性(溝通查詢的機制、會員回饋等)
- 物流配送(到貨及退貨處理)

然而，由於網路、行動裝置的普及，使得全通路的接觸點管理日趨複雜，每個接觸點都是一個吸引顧客或顧客流失的機會。如何提升顧客體驗將成為未來品牌通路經營之重要目標。

觀察零售趨勢，實體店面仍在全通路的環節中扮演重要角色，許多台灣消費者還是喜歡這種美好、有溫度的實體購物體驗，而這也是近年來品牌快閃店、店中店成為品牌「體驗行銷」利器的主因。快閃店多以創意策展的形式引起話題，再加上社群媒體的推波助瀾，通常能吸引消費者走進店裡一探究竟。除了期間限定，快閃店內的限量商品販售可創造品牌討論聲量，亦能傳達品牌訊息給消費者。觀察近期市場中採取「體驗行銷」概念的品牌包括：

- **香奈兒 COCO GAME CENTER 美妝遊樂場**
靈感來自日本大型電子遊樂場，展場佈滿遊戲氛圍
- **IOPE Lab 美肌實驗室**
O2O (online to offline)線上線下串連新零售體驗，透過掃描 Qr code 立即購買、立即提貨無需等待。
- **日本蔦屋書店 X Airbnb = 來去書店住一晚**
許多日本旅遊觀光客必遊之景點
- **Burberry未來商店**
虛實整合，運用數位科技融合實體通路，銷售人員用 iPad 直接客製化風衣，並可即時下單購物。

傳統零售業已迎向新零售時代，未來將會是線上、線下和物流結合在一起的新零售時代。品牌端需更加重視消費者體驗，思考如何能加強虛實整合的商業模式，透過數據分析為顧客提供個人化的服務，並優化實體店面服務、簡化線上平台程序，如：推出線上訂、到店取的服務、持續利用新科技推動店面的數位化....等，以期提供消費者更人性化、更能將其購買體驗無縫地跨管道進行，全通路一致性的消費體驗無庸置疑已成為現今品牌需面對的重要課題!!

Ipsos 益普索市場研究

Ipsos是全球頂尖的專業市場調查研究機構，在世界各地八十九個國家設有分公司，在挖掘顧客經驗，執行品牌行銷調查，我們具有創新的思維與先進的科技。我們是世界頂尖企業執行長最信賴的企業顧問，我們也有熟悉各產業的專家協助測量、模擬和管理顧客與員工關係。

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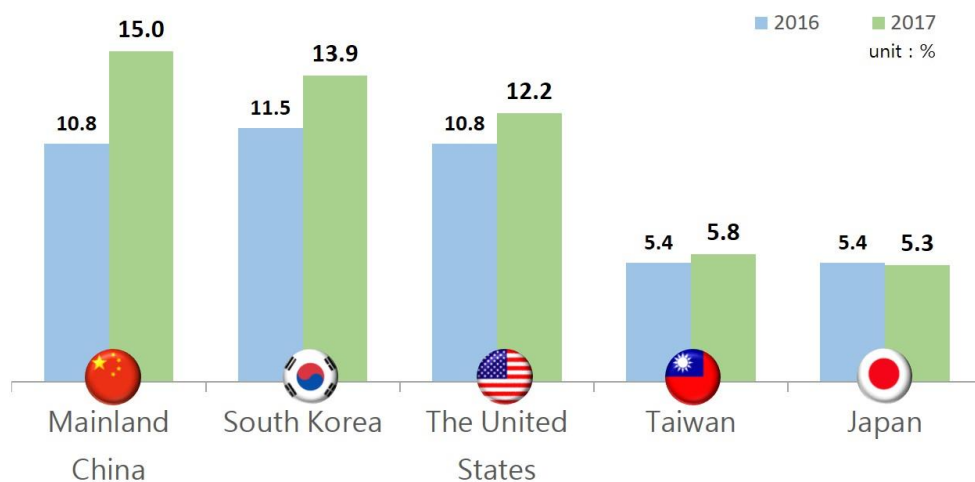
How do retail brands win shoppers back under the wave of digitalization?

Anita Yang, Ipsos Research Manager



The rise of e-commerce has caused many physical channel operators to suffer in recent years. According to the latest economic trend released by the Department of Statistics, Ministry of Economic Affairs, share of e-commerce sales in total retail industry has increased year over year worldwide. Taiwanese e-commerce retailers are booming with continued revenue, benefiting from the mature Internet environment, massive smartphone usage, and the convenience of online shopping.

The Proportion of Online Sales in Retail Selling



Data Source: Department of Statistics, MOEA

Additionally, the survey result of consumer online shopping behavior by Market Intelligence & Consulting Institute (MIC) shows that the average frequency of online shopping has approached in-store purchasing in Taiwan. On average, 4.5 out of 10 times of purchases are through online shopping channels.

Interestingly, while e-commerce is widely considered as the future trend, why e-commerce websites are flipping the script and opening physical stores one after another? The first physical Amazon bookstore was opened in 2015, followed by a brick-and-mortar grocery store; Alibaba entered 3C retail and successively bought shares, acquired supermarkets, department stores and hypermarkets. It is not difficult to find that the two e-commerce giants have realized that physical stores are still indispensable.

For those offline retail brands which focus on physical channels, their task is to figure out how to respond to changes in consumer behavior, challenges from online retailers and market erosion due to disruption in traditional retail through digital transformation. Macy's has closed more than 100 stores and shifted its focus to online operations and mobile shopping; ZARA is committed to integrate e-commerce platform and brick-and-mortar; Senao International has been actively deploying omnichannel. Simply put, traditional retailers are also actively engaging in online channels.

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Regardless of online or offline retailing, both parties are aware of the need for virtual and physical channel integration and have been working toward omnichannel experience.

- E-commerce operators have found that, although online shopping and browsing products are convenient, having people to actually touch your products is more convincing. It is hard to divide your overall shopping experience into online and offline. If you expect a growth in revenue, it is important to have consumers directly engaging with the products and make up for what is lack in e-commerce shopping.
- In addition to digital transformation, physical retailers also consider upgrading consumers' in-store experience. By merging online and offline retail strategy, it is hoped that the traditional retail industry will win back consumers in this digital and mobile era.
- For specific or new products, if consumers have not tried or used it, it is less likely for them to directly order online. Besides, the amount spent by a customer in a single transaction or purchase in physical store is often higher than online shopping, and the conversion rate is also higher. Although Taiwan's e-commerce penetration rate is quite high, based on consumers' actual shopping behaviors, physical storefront is still an important shopping channel.

Consumer Shopping Journey - Touchpoints analysis



To promote omnichannel business model, retailers need to center on customer to business (C2B) by connecting online and offline products, customers, and services, and bridging online shopping behavior to physical storefronts experience to create a cohesive shopping experience for customers through different channels.

In order to create a perfect customer experience, the brand must fulfill customers' key needs throughout customers' shopping journey, whether it's in-store, on the phone or online. If a brand/product has good online word-of-mouth, and draw customers' attention to purchase yet the physical store service is disappointing to them, it is highly possible to lose customers because of that.

1. Pre-shopping:

- Search for related information, compare product/service/price, then decide purchase channels.

2. During Shopping:

- Consumers usually use their mobile phones to compare prices online, search for usage reviews and ask for opinions from their friends and family when shopping in-store.
- Whether it is easy to find specific products
- Difficulty in making decisions between similar products
- Services provided by in-store sales
- Length of time waiting for checkout
- Diverse payment options
- In-store pickup or home delivery service

3. Post-shopping :

- After-sales services (communication mechanism, membership reward program, etc.)
- Logistics services (product arrival and return management)

However, increase in Internet and mobile device popularity, leads to complexity in omnichannel touchpoints management since each touchpoint is an opportunity to attract or lose customer. Hence, how to improve customers' experience will become an important goal in the future.

By looking into retail trends, physical store still plays an essential role in omnichannel since many Taiwanese still prefer human interaction and pleasant environs and this is why pop-up stores and shop-in-shops have become such useful tools for "experiential marketing" nowadays. Pop-up stores use creative displays to generate buzz and follow up with a strong social media campaign to attract customers to walk in. Aside from opening just a limited window of time, it not only sells products that are exclusive to the pop-up stores to create share of voice for the brand but also delivers brand messages to consumers. Brands that adopted "experiential marketing" strategy from recent market observations are listed as below:

- **COCO GAME CENTER - Cosmetics Arcades**
Inspired by the large-scale gaming arcades from Japan, the exhibition is full of gaming vibe.
- **IOPE Lab**
O2O (online to offline) new retail experience, quick purchasing via QR code, immediate products pick up without waiting.

- **TSUTAYA BOOKSTORE X Airbnb = Overnight stay in the bookstore**
Must-visit tourist spots in Japan
- **Burberry**
Click-and-mortar, a combination of digital technology and physical store, salespersons can customize coats directly on iPads and place an order immediately.

Traditional retail industry has transformed to the new era of retail, mixing online, offline and logistics. Hence, brands should be paying more attention to consumer experience, deliberating on how to strengthen the click-and-mortar business model, providing personalized services to customers through data analysis, optimizing services in physical stores, and simplifying online platforms processes, for instance, offer online order, in-store pick-up service, promote in-store digitalization with new technology. Omnichannel shopping experience has become a key task for brands to think about to provide consumers with more humanized, seamless, cross-channel purchasing experience.

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