消費者購物行為的改變

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數位化科技不斷地推陳出新，電子商務持續的發展意味著我們的購物方式也不斷地在改變。科技創造了一個不受地理環境或實體商店影響的數位化購物情境。實體商店也在改變，不僅僅是在店內整合了科技也與數位化情境串連，以利於提供全通路的體驗。因此，我們需要了解這些變化以及在規劃市場策略或優化購物策略中所面臨的問題。

這篇白皮書裡探討五個我們正面臨的改變，並了解這些改變背後的原因和益普索如何運用五個不同的方法來因應變化。

1. 增加抉擇的複雜性(complexity of choice)來推動決策捷徑
2. 購物前的品牌偏好(pre-store preferences)是影響購買的主要因素
3. 數位化革命正改變消費者的行為(behavior)
4. 具顛覆性的新型態電子商務(e-commerce)每天都在改變
5. 全通路購物 (omnichannel) 整合了實體商店與數位化環境

1. 增加抉擇的複雜性來推動決策捷徑:

抉擇的複雜性是消費者在購買日常生活用品中最常面臨的問題。持續並反覆的創新以及產品線的快速擴展意味著許多產品類別都變得很碎片化 (fragmented)。我們的大腦根本無法試圖考慮、處理與思考所有購買選擇的選項。因此，我們使用視覺上的捷徑，來選擇性地區分哪些是最重要的並過濾掉那些無關的訊息。大腦必須根除那些不必要的刺激以利於應對周遭複雜的環境。這就是為什麼購物，無論是在實體商店或網路上都需要把選項分開來思考。這不外乎是因為對於便利性有更高的期望以及在注意力日益減少的情況下更準確地的選擇。

科技可以幫助我們更快速地完成決定，我們也看到越來越多運用人工智慧、聊天機器人和聲控的實例。

2. 購物前的品牌偏好是影響購買的主要因素:

在益普索購物旅程 (LIFE Path) 的研究中，我們發現多數的品牌決策發生在購買前(pre-store)，尤其那些我們經常購買的商品。店內越來越複雜的擺設扮演了重要的角色驅動了重複性購買，當然來自各接觸點所累積的品牌印象以及使用產品的經驗也有一定的影響。即使是糖果類別 - 這個傳統上被認為存在許多衝動型購買的類別，在比較所有在購物過程的影響因素後，我們發現品牌偏好仍然是影響購買的最重要因素。這代表了品牌建構和品牌存在性在決策考量階段和偏好中至關重要。

3. 數位化革命正改變消費者的行為:

透過智慧型手機和平板電腦，我們只需要滑動手指就能得到豐富的資訊，包含評論、價格比較、產品功能。我們有能力透過在社群網站上發文、評分與評論來影響別人，並得到立即和真正的產品訊息。

這種數位生態幫助我們對於產品作出明智和理性的決策。我們也被日益複雜和目標導向的數位化廣告影響。數位化廣告不只是我們在螢幕上看到的內容，以 AI 人工智慧為基礎的數位助理以及類似 Amazon Echo (亞馬遜智慧家庭裝置) 聲控系統的興起，

顯示了一個趨勢 - 就是我們依賴這些工具來幫助我們作出正確的決定。我們面臨的風險是人工智慧與演算法驅動了所有的決定。

4. 具顛覆性的新型態電子商務每天都在改變:

全球的電子商務持續成長。現在，電子商務佔了全球總零售額的 9% (所有類別和市場的平均)，並預估在未來五年會成長一倍。電子商務在大陸和英國較顯著，前者有 24%的消費者使用而後者則有 16%。然而，電子商務不單單是在不同平台購買相同的商品。數位化環境大大減少了新品牌進入市場的成本，並讓新品牌有發展的空間並創造更多更好的選擇。電子商務也使交易能用不同的方式完成，並且最終能改變我們的購買行為。

> 我們有能力透過我們在社群網站上的貼文來影響他人。

以下為破壞性電子商務的例子:

直銷模型(Direct-to-consumer models)

直銷模型(Direct-to-consumer models) 給予品牌一個能直接與消費者溝通和建立關係的機會。美元刮鬍俱樂部(Dollar Shave Club)是最成功的案例。這個品牌於 2012 由一名新創企業家 Michael Dubin 成立，在刮鬍刀市場中，吉列刮鬍刀 (Gillette) 是市場的老大哥市佔率高達 72%。Dollar Shave Club 的產品主張高品質刮刀，並採用類似雜誌訂閱的概念以吉列刮鬍刀一半的價格就能宅配到府。再加上造成轟動的創意網路廣告，使大家感覺像是一個男人俱樂部而不像刮鬍刀的供應商。Dollar Shave Club 因此快速衝高了市佔率，並在 2016 年以 10 億美元賣給聯合利華 (Unilever)。現在，Dollar Shave Club 已徹底改變了男性購買刮鬍刀的購物行為，並使許多品牌包括吉列與美國的連鎖藥局 CVS 仿效其策略模型。

亞馬遜(Amazon) 的成功來自於創新所帶來的群眾效益

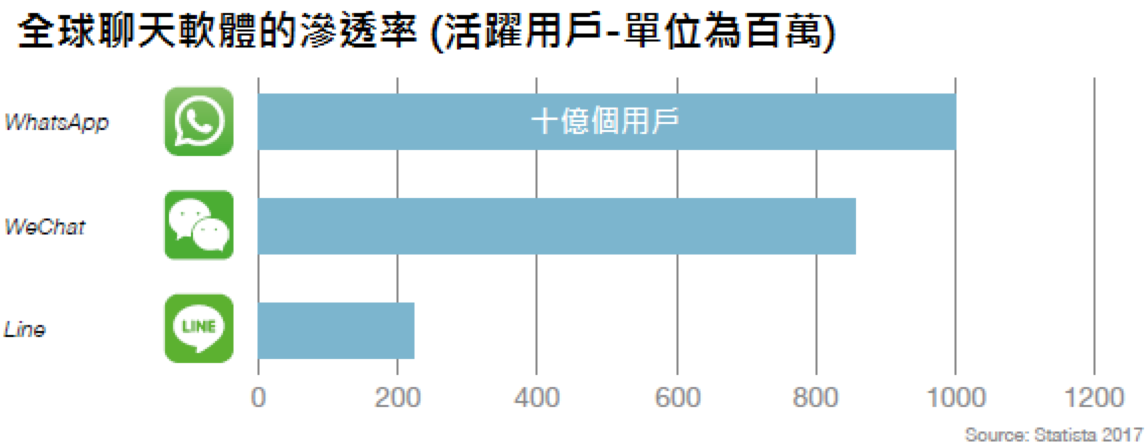
亞馬遜已成為網路零售中的主導者，無論是提供便利性或是對於訂購流程及出貨速度都建立了消費者新的期望。亞馬遜現在在美國有超過 8000 萬的 Prime 用戶，相較非 Prime 用戶平均只花費 800 美金，這些 Prime 用戶每年平均花費高達 1400 美金。亞馬遜也是第一個發展出 “自動補貨” 快捷鍵的公司，以利於提供簡化並加快回購經常購買的日常生活用品的流程。

亞馬遜隨後進入了 Zero UI 的購物介面，同時亞馬遜智慧家庭裝置 Echo 也提供聲控購物。使用 Echo 購物能讓人驚艷，根據美國公關諮詢公司 (US PR consultancy) 的 Walker Sands 指出，24%的美國民眾已經擁有任何與聲控相關的設備，同時也有 20%的消費者打算在一年內購買這種設備。Echo 是亞馬遜 Prime 日(Amazon Prime day)最暢銷的產品。亞馬遜也了解單靠一套劇本無法完全滿足消費者，尤其是在生鮮食品類。亞馬遜因此收購了 Whole Foods (美國一間連鎖有機超市)來確切地表明他們想整合實體商店和網路購物的便利性來提供全通路購物體驗。

電子商務服務

整個服務經濟因著科技而成長，並將想要商品的消費者與能提供寄送服務的服務商串連起來。如印尼的 Go-JEK (印尼本土叫車服務龍頭) 和拉丁美洲的 Rappi (配送服務公司) 都是很好的範例。使用 app 應用程式的人隨時能在有需求時 (on demand) 購買商品。Rappi 的商業模式是讓快速消費品廠商支付

具有顯著露出效果的上架費用 (app 應用程式是依照商品類別而不是依照店家來劃分)，這種商業模式的營收佔了 Rappi 55%的全部營收。此外，消費者也使用 Rappi 提供的其他服務，例如由司機幫您提領現金而您不需要親自去 ATM (自動櫃員機)。



聊天商務

聊天平台的成長給予品牌創造衝動購買的可能性。平台如中國的微信和Line在亞洲都很先進。除了線上聊天以外，微信還提供了購物、線上音樂串流、計程車叫車服務、訂電影票 - 全部都能使用app來支付。有高達95%的奢侈品牌都已經可以在微信平台上找到，而 Line 甚至透過每週提供特定優惠來測試食品雜貨的快遞服務。聊天平台最強大的實力是他們龐大的規模，微信在中國擁有超過8億的用戶。雖然這目前可能是一種亞洲現象，但全球最大的聊天平台WhatsApp，擁有超過10 億的用戶，也正朝著整合電子商務的方向邁進。

聊天在企業與消費者中變得很流行，並在 2016 年時跨出了一大步，當時臉書同意讓零售商使用它們的 Messenger 平台來建立聊天機器人。這意味著客戶不需要下載特定的零售商應用程式，只需設計聊天機器人在 Facebook 上與客戶進行對話進而產生互動。

透過建立在Messenger上的聊天機器人，臉書克服了成長的障礙，高達50%的智慧型手機不需要再下載新的品牌app。根據Facebook的調查，繼Sephora後，美妝產品的零售商透過Messenger平台推出預約的功能，整體預約數成長了11%。

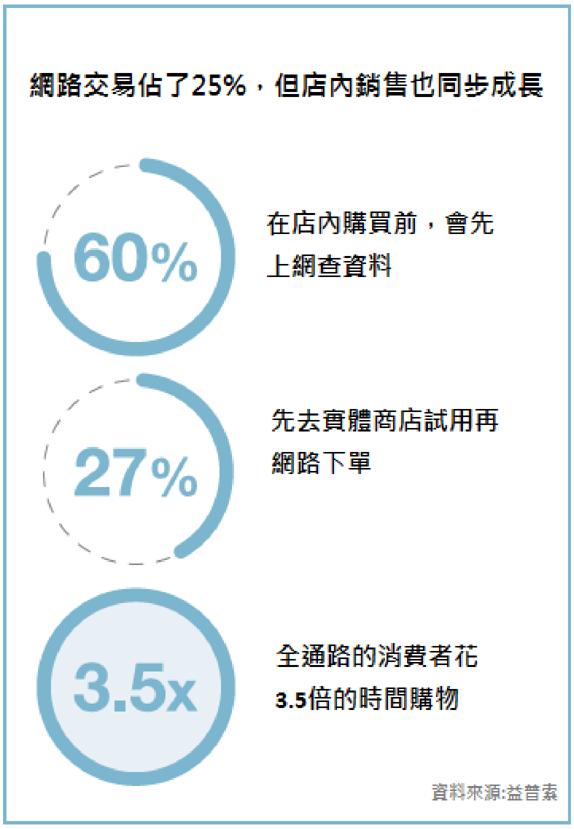
其他平台也紛紛仿效這個模式。在2017年6月，蘋果宣布將推出一款蘋果商業聊天平台(Apple Business Chat)。WhatsApp也即將在他們的平台上測試商業交易(business exchange)的功能。

5. 全通路購物整合了實體商店與數位化環境:

真正的全通路零售代表我們能在網路上、在手機上或在實體商店內做購買，並選擇快遞或送至指定取貨的地點。這進而代表我們能透過不同管道來退貨。因此，全通路購物提供了購物的便利性並減少了購物中所面臨的阻礙。雖然網路平台提供了發想的環境、豐富的資訊和有效率的遠端購買，在實體商店裡，我們可以看到商品並實際地觸摸、試穿和評估產品(是許多商品類別重要的衡量因素)。對於真正的全通路企業來說，這將改變實體商店所扮演的角色，因為實體商店不需要庫存所有的商品，而可以專注提供更多顧客體驗。

英國品牌John Lewis是一個很好的範例，這個品牌現在已經有1/4的交易透過網路，但這並沒有取代實體商店的銷售。它反而提供消費者全通路體驗來促進消費。John Lewis 發現了全通路購物者的購物時間是使用單一通路購物者的3.5倍。

許多網購品牌也意識到了實體商店與數位間相互作用的重要性。Memebox是一間韓國的美容公司，由網購起家專門銷售韓國主要美妝品牌的產品，但後來發展了自有商品。現在有80%的銷售都發生在手機上，品牌也開始拓展實體商店讓消費者能在店裡實際嘗試新產品。



益普索的研究點出下列幾個注意事項:

1. 增加抉擇的複雜性來推動決策捷徑

品牌需要在重要的時刻與消費者建立關係，同時關注以目標導向為主的數位行銷並確保店內商品的可見度。零售商也必須思考如何分類來讓商品抉擇變得更直覺與更順暢。

2. 購物前的品牌偏好是影響購買的主要因素

這代表品牌必須保持品牌聯想的顯著性，或在有意識和淺意識的狀態下納入商品考慮組合中(consideration set)。

3. 數位化革命正改變消費者的行為

數位化接觸點能強烈地強化或破壞品牌偏好性，因此，擁有確切數位化環境並將訊息正確地傳達是最能在對的時刻影響消費者決策。

4. 具顛覆性的新型態電子商務(E-commerce)每天都在改變

品牌必須思考進入市場的新途徑以及如何在新通路中提供更方便與更快速的購買方式。

5. 全通路購物整合了實體商店與數位化環境

零售商需要提供無縫接軌的解決方案，流動性(fluidity) 已成為一種新的 ”貨幣” 用來區分零售商。

品牌必須在重要的時刻與消費者建立關係

為考慮到品牌眾多的接觸點、新通路和不斷增加的選擇，這些因素使購買旅程變得更加複雜。在益普索，我們提供客戶全方位的購物旅程、網路購物的變化 (包含共同瀏覽和網路商店)，以及具戰略性的線上與線下研究來協助我們的客戶在不停變化的市場中找尋並使客戶更加了解消費者的購物行為和動機。

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。

更多的資訊，請參考 https://www.ipsos.com/en-tw/solution/overview#category3

或洽詢我們的研究團隊

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The evolution of shopper behavior

Stuart Wood, Ipsos

Continued developments in digital technology and advances in e-commerce mean that the way we shop for products and services is also evolving. Technology has created a digital retail landscape that is unrestricted by geography and the normal dynamics of bricks and mortar stores. Physical stores are also changing as they not only integrate technology in-store but better connect with the digital world to increasingly deliver a seamless omnichannel offering. As a result, we need to understand these changes and their implications when planning go-to-market strategies or optimizing shopping marketing programmes.

In this white paper we will look at five changes we're experiencing, look at why it's happening and reflect on how Ipsos is adapting to the situation in five distinct sections:

1. Increasing **complexity of choice** promotes shortcuts in decision making
2. **Pre-store preferences** are a huge factor shaping purchases
3. The digital revolution is reinventing shopper **behaviour**
4. New disruptive **e-commerce** models evolve everyday
5. **Omnichannel** brings together the physical and digital words

1. Increasing complexity of choice promotes shortcuts in decision making:

Complexity of choice is an issue for shoppers buying everyday products. Continuous, iterative innovation and the proliferation of line extensions mean that most categories have become very fragmented. Trying to consider all options is a cognitive task that our brains simply cannot handle. Therefore, we use visual shortcuts to selectively focus on what is most important and filter out irrelevant information[1]. The brain has to eliminate unwanted stimuli to cope with the complexity of the surrounding environment. This is why shopping (both in store and online) is really about"de-selection". This is arguably getting more acute with increasing expectations of convenience and dwindling attention span.

Technology can of course help us make quicker decisions and we are seeing increasing adoption of Artificial Intelligence (AI), chat bots and voice activation.

2. Pre-store preferences are a huge factor shaping purchases:

We are seeing through our LIFE Path research at Ipsos that a high percentage of brand decisions are being made pre-store, particularly for the things that we buy very frequently. Increasingly, complexity in-store certainly plays a role but so does the cumulative impact of brand touchpoints and of course product experience that drives repeat purchasing. Even for a category like confectionery, which may be traditionally thought of as a strong impulse category, we see that existing brand preferences are stronger than any influences encountered during purchasing; this means that brand building and saliency are critical in driving consideration and preference.


The significant influence of pre-store preferences....
Preferred brand
Brand in consideration set
Touchpoints encountered during purchase
Impact on brand choice


A high percentage of brand decisions are being made pre-store, particularly for the things that we buy very frequently.

3. The digital revolution is reinventing shopper behavior:

Through our smartphones and tablets we have a wealth of information at our fingertips including reviews, comparative pricing, product features. We have the power to influence others through what we post on social media and of course through ratings and reviews, resulting in access to immediate and tangible information on products.

This digital eco-system helps us to make more informed and rational decisions about the product choices that we make. We are also influenced by increasingly sophisticated and more targeted digital advertising. Digital goes beyond what we read on a screen. The rise of AI-powered digital assistants and voice-activated systems like Amazon Echo show a trend where we rely on these tools to help us make the right decisions. Arguably our decisions are at risk of being led by AI and the algorithms that drive them.

4. New disruptive e-commerce models evolve every day:

E-commerce continues to grow at a global level. Today e-commerce represents around 9% of total retail sales globally (averaged across all categories and markets), though is set to nearly double in the next five years. E-commerce is particularly strong in markets such as China (24%) and the UK (16%). However, e-commerce is not simply buying the same products through a different channel. The digital environment reduces the “cost of entry” for new brands and so allows new players to emerge and create even greater choice. E-commerce also allows transactions to take place in very different ways and ultimately changes the way that we buy products.

> “We have the power to influence others through what we post on social media...

Here are a few of the many examples of disruptive e-commerce models:

<u>Direct-to-consumer models</u>

Direct to consumer models offer brands the opportunity to communicate directly and own relationships with shoppers. Dollar Shave Club is probably the most famous and one of the most successful direct to consumer e-commerce models. Founded in 2012 by a first-time entrepreneur Michael Dubin, it took on the male shaving category dominated by Gillette (at the time 72% of the market). The proposition was high quality razors at a fraction of the price delivered to your home on a subscription basis. The genius was making it feel less like a shaving supply company and more like a full scale men’s club, driven by creative online advertising that went viral. Dollar Shave Club gained massive market share and in 2016 Unilever paid $1bn for the company. Today, Dollar Shave Club has revolutionised how many men buy their shaving products, spawning a multitude of copycat models including one from Gillette itself and (US) pharmacy chain CVS.

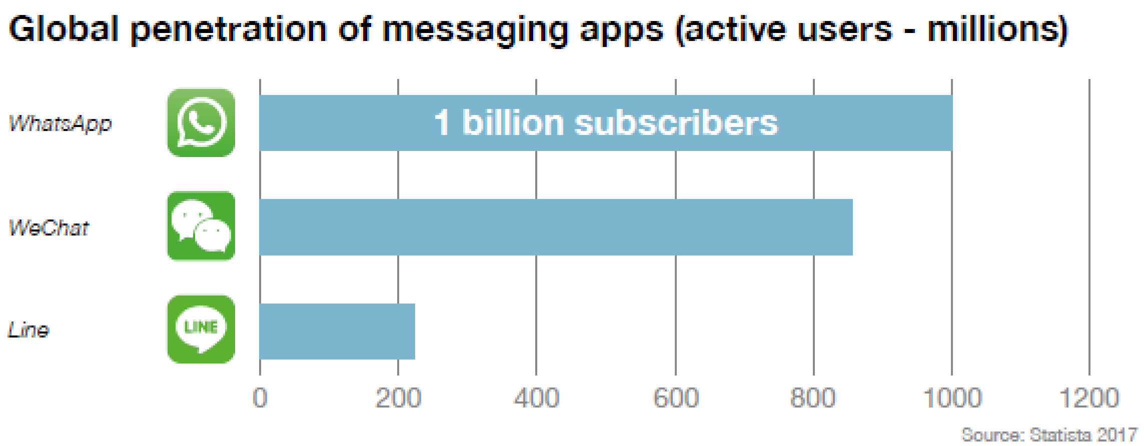
Amazon, success through critical mass and innovation

Amazon has become a dominant force in online retailing by providing ultimate convenience and setting the new expectations regarding ease of ordering and speed of delivery. In the US, Amazon now has more than 80 million Prime subscribers and data shows that these shoppers spend on average $1,400 a year vs $800 for non-Prime subscribers[2]. Amazon was also first to develop "automated replenishment" through the launch of Dash buttons – providing instant reordering for frequently used everyday brands.

Amazon has subsequently moved into Zero UI (user interface) shopping with the Amazon Echo allowing voice activated shopping. Adoption of Echo has been impressive; according to US PR consultancy, Walker Sands, 24% of US consumers now own a voice-activated device with another 20% planning on purchasing one in 2018. Amazon Echo was the best-selling product on Amazon Prime Day. This all being said, Amazon has recognised that being a pure play won't deliver the results it needs, especially in fresh groceries. Their acquisition of Whole Foods is a clear indication of the need to develop an omnichannel offering that blends physical stores with online convenience.

E-commerce services

A whole service economy has grown around technology that can link those who want something with those who are prepared to deliver. Companies like GO-JEK in Indonesia and Rappi in Latin America are great examples. Those using the app can get products purchased and delivered on demand. Rappi's business model is to get FMCG companies to pay for prominent placement (the app is organized by product not by stores) and placement accounts for 55% of Rappi revenue. But people also use Rappi for many other services such as moped drivers delivering cash rather than users having to venture out to cash machines themselves.



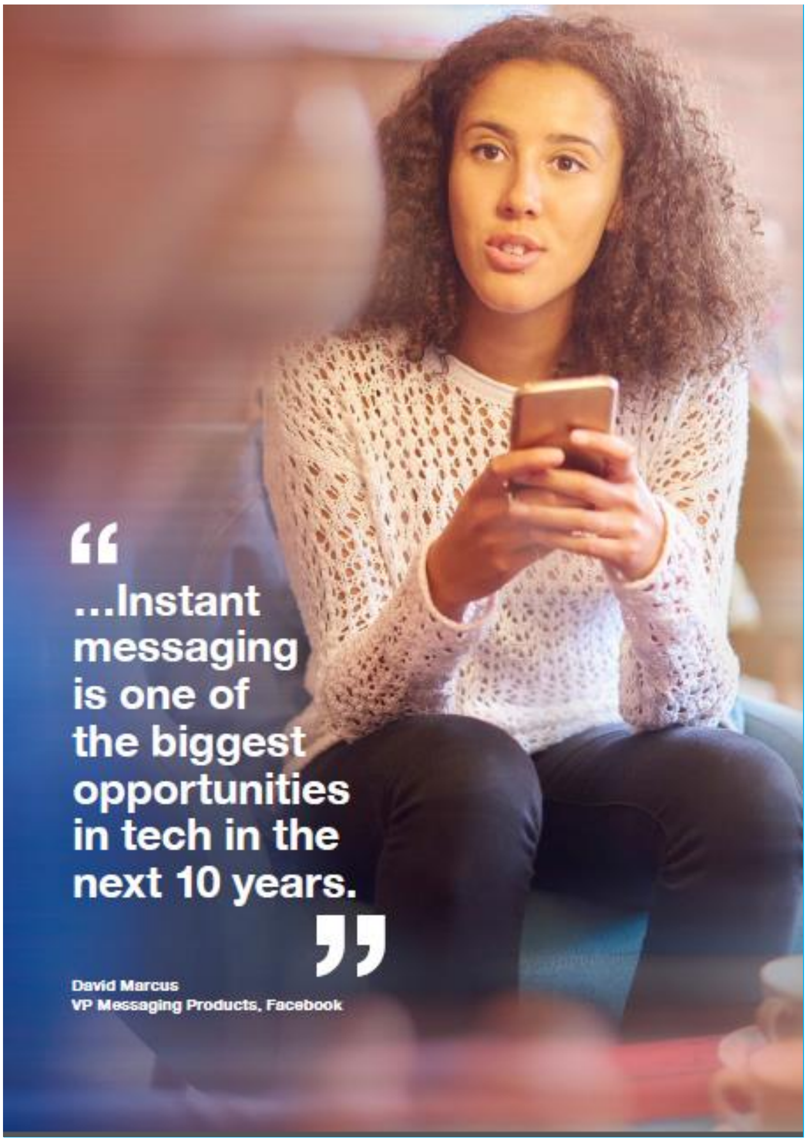
Chat-commerce

The growth of chat platforms has provided brands with an opportunity to generate digital impulse purchase opportunities. Platforms such as WeChat (China) and Line in Asia are most advanced with this. Beyond messaging, WeChat offers shopping, music streaming, taxi booking, cinema tickets,– all with integrated payments. A massive 95% of luxury brands are present on WeChat and Line has even experimented with grocery deliveries through targeted weekly offers. The power of chat platforms is of course their sheer scale - WeChat has over 800 million users in China. While this is largely an Asian phenomenon, WhatsApp, the world's biggest messaging platform with over 1 billion subscribers, is moving towards integrating e-commerce opportunities for brands.

The feasibility of chat becoming popular between businesses and consumers took a massive step forward in 2016 when Facebook decided to allow retailers to create chatbots using its Messenger platform. This meant that customers didn't need to download and install a new retailer specific app – it meant just inviting a bot to a Facebook conversation and then interacting with it.

By doing so, this mechanism overcame a growing obstacle, in as much as nearly 50% of smartphone users were no longer downloading new retail apps. According to Facebook, after Sephora, the beauty products retailer, launched its appointment schedule service via Messenger, its in-store makeover bookings increased by 11%.

Other platforms are following suit. In June 2017, Apple announced plans to launch Apple Business Chat. WhatsApp will soon be testing its business exchange features too.

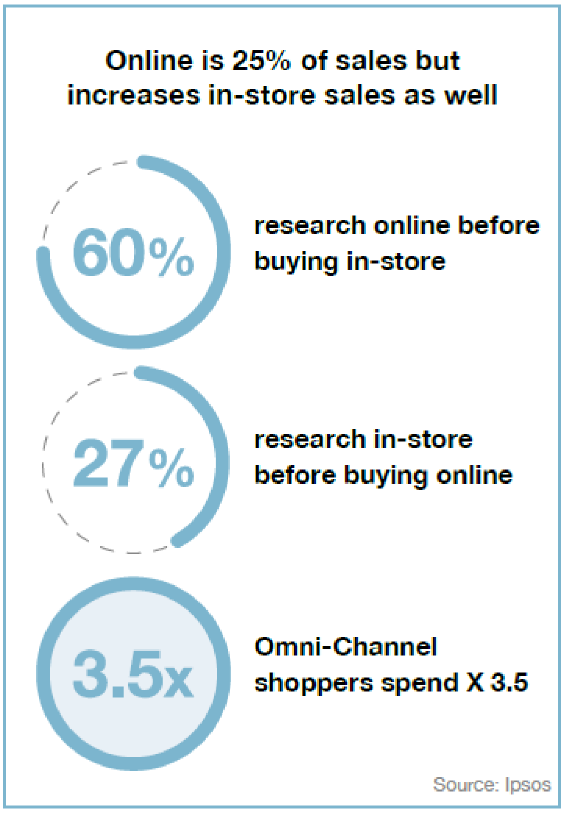


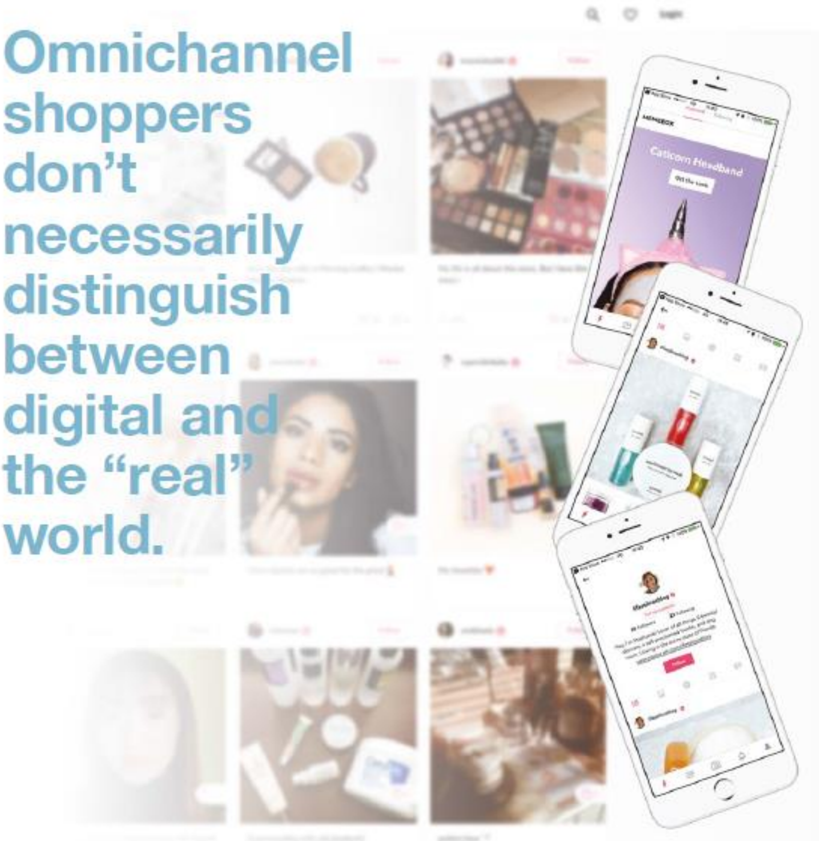
5. Omnichannel brings together the physical and digital worlds:

True omnichannel retailing means we can buy online, on mobile or in-store and choose to collect or have these items delivered to us or at a location that's convenient to us. It also means we can manage returns through multiple channels. Omnichannel therefore provides ultimate convenience and reduces barriers to purchase. Physical locations allow us to view, touch, try and evaluate products (an important factor in many categories) while digital channels provide access to inspiration, information and of course efficient remote purchasing. For true omnichannel businesses this potentially changes the role of the physical store, which can be become smaller as they don't need to stock all products and can focus on delivering more of an experience.

A great example of this integration is John Lewis in the UK. A quarter of their transactions now take place online, but this has not been at the expense of sales through physical stores. Indeed, giving shoppers a seamless omnichannel experience promotes spending. John Lewis has found that omnichannel shoppers spend 3.5 times more than those shopping through only a single channel.

Many pure online players have also realised the importance of the interplay between the physical and digital world. Memebox is a Korean beauty company, that started as a pure online player selling curated beauty boxes from major Korean brands, but has since expanded to provide own label products. Eighty percent of sales are on mobile but they've now started to open physical stores where shoppers can experiment with new products.





Our research points out the following:

1. **Increasing complexity of choice promotes short cuts in decision making**
   Brands need to connect with shoppers in the moments that matter most, be that focusing on targeted digital marketing or ensuring optimal visibility in-store. Retailers need to think about assortment and how to make product selection as intuitive and fluid as possible.

2. **Pre-store preferences are a huge factor shaping purchases**
   This means brands need to maintain mental saliency to be top of mind or at least in the (conscious/sub-conscious) consideration set.

3. **The digital revolution is reinventing shopper behavior**
   Digital touchpoints can strongly reinforce or disrupt brand preferences so having the right digital presence and right messaging is important to influence decision making at the right moments.

4. **New disruptive e-commerce models evolve everyday**
   Brands need to consider new routes to markets and be available in new channels that offer greater convenience and quicker fulfilment.

5. **Omnichannel brings together the physical and digital worlds**
   Retailers increasingly need to offer seamless solutions; "fluidity" is becoming a new "currency" that can differentiate retailers.

Brands need to connect with shoppers in the moments that matter most.

All of these factors make the path to purchase more complex to understand given the multitude of touchpoints that brands can use, new channels and increasing choice. At Ipsos we help our clients navigate this evolving landscape and better understand shopper behaviour and motivations, by providing both a holistic view of the path to purchase (LIFE Path), the dynamics of online behaviour (Co-browsing & Webshop) as well as tactical research that informs activation both in-store and online.

Ipsos

Ipsos is the global leader in branding and marketing research and has locations in over 89 countries across the world. Our creative solutions help us build strong relationships which lead to better results for our clients. This has made us the trusted advisor and with all matters lead by our industry expert from measuring, modeling to managing customer and employee relationships.

For more information, visit us online at:

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