百貨公司轉型 vs.網路購物：電子商務究竟協助還是取代實體店面呢?

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當我跟我六歲的兒子說我沒空出去買你所需的東西，並問他「你不能在亞馬遜上買到嗎?」。

這句話常常能在我家聽到，我們多數商品都仰賴網路購物因為它省時又方便。

事實上，上次我踏進百貨公司究竟是什麼時候呢? 大概已經有一段時間之前了吧。但我卻依稀記得因為沒有存貨，商場因此關門而無法採買東西。

從 Payless ShoeSource Inc. (美國平價連鎖鞋店)到美國服飾業者 Diesel 和 Topshop，近年實體零售商店陸續宣告破產。還有報導指出，其他幾家主要的零售商也將面臨破產危機。

近年來，電子商務蓬勃發展、直接販售商品給消費者的品牌、易取性以及不斷變化的消費行為，這些都是讓百貨公司逐漸沒落的原因。

益普索全球顧問調查(Ipsos Global Advisor Survey)在 25 個國家中訪問超過 25,000 名受訪者，超過一半(51%)的受訪者指出現在的網路購物與服務比一年多前來得更為便利。

當你再加上有 41%的人認為網路購物跟一年前一樣便利時，顯示有多數人(92%)是傾向認同網路購物的便利性。

也許與你的認知不同，在 25 個國家中，網路購物相對較為容易的國家包括了:

- 肯亞、巴基斯坦 (66%)
- 奈及利亞 (63%)
- 印度 (58%)
- 埃及、印尼、墨西哥(57%)

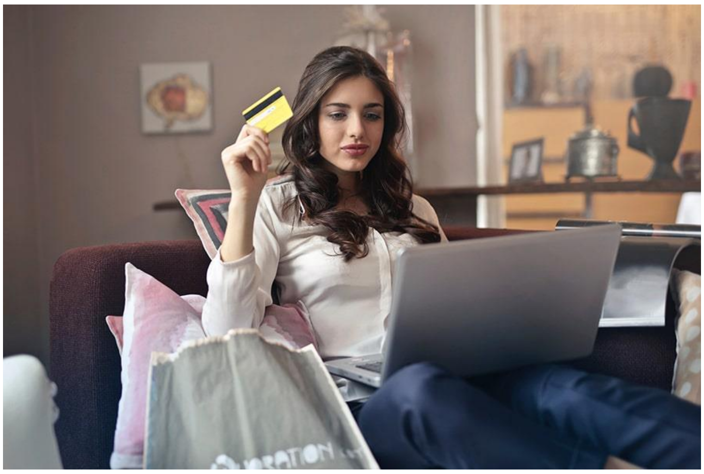
百貨公司正在「轉型」

紐約大學斯特恩商學院 (New York University Stern School of Business) 市場行銷學教授拉賽爾·維納 (Russell Winer) 指出，百貨公司並不會消失，因為它仍然為農村及偏鄉地區提供便利服務，但同時間它也在轉型。

溫納提到:「某些購物中心正被改建做為其他用途，如教育場所、溜冰場等。」但千萬別忘了，根據美國政府統計的數據，目前仍然有 90% 的購物來自於實體商店，顯示實際上還有大量的實體商店存在。」

美國商務部 (U.S Department of Commerce) 最新數據顯示， 8 月份的零售額與 7 月相比增加 0.4%，主要受到汽車與網路購物銷售的帶動，進而高於市場預期。但是，一般購物商場像百貨公司和食品與服裝零售商同期銷售額卻衰退。

根據安侯建業聯合會計師事務所 (KPMG) 和英國零售商協會 (British retail Consortium) 的數據顯示，英國 8 月份的零售額與去年同期持平，是自 1995 年有紀錄以來第二低的月份。



管理顧問公司 Retail Advisors Network 的共同創辦人和合夥人布魯斯·溫德 (Bruce Winder)也認為，那些沒有開在市中心的購物商場必須重新定位，因為他們正在失去能帶來主要商業動能的承租業者。

溫德提到: 「強大的購物中心越來越像以前的傳統體驗市場，人們去購物中心能一網打盡購買不同種類的商品、獲得不同體驗及服務」。他也表示:「娛樂、食品、探索以及網路下單門市取貨等已成為商場的支柱。」

同時間對於電子商務來說，購物者並沒有因為擔憂安全性而打退堂鼓。

僅有 12%的受訪者表示，為保護個資，他們網購的次數比一年前來得更少。另一方面，卻有 15%的人表示他們網購的次數更為頻繁。

結合實體商店及網路購物

美國益普索消費旅程副總裁 John Green 指出，電子商務對零售發展帶來兩個獨特的面向 – 它排除了地域上的限制，並能提供即時訊息。

長久以來，我們都在我們居住的區域裡購物。電子商務的沉浸式消費體驗消除了這個地域性的障礙，我們讓世界垂手可得以創造顯著零售競爭來吸引不同地區消費者的目光。第二...不斷進化的數位平台讓購物者能更容易評估更大量的商品以及它們的售價。

Green 補充說，零售商和製造商能夠創造一個無縫接軌的消費體驗環境，並能讓購物者輕鬆地在實體商店及數位環境間做切換，尤其是在網路購物中導入擴增實境和虛擬實境應用的那些業者才有機會從競爭中勝出。

同時，溫德還指出，網路購物在某種程度上已存在 20 年，但我們現在正處於一個它開始搶攻市佔率 - 尤其是對於那些利潤較低的零售商更為顯著。

我們在過去 5 年看到的變化比過去 20 年來加總起來還要多。「數位化原生品牌的誕生吸引了千禧世代和 Z 世代的注意力及其荷包，他們也開始增加自己關注的網路特色商店。」

Ipsos 益普索市場研究

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Mall makeovers vs. online shopping: e-commerce support or replace brick and mortar?

文 | Rajeshni Naidu-Ghelani, Public Affairs, Ipsos Canada

“Can you Amazon it?” asks my six-year-old son when I explain to him that I don’t have the time to go out and buy something that he needs right away.
This phrase comes up often in my house where we’ve resorted to buying a lot of things online mainly due to time and convenience.

In fact, when was the last time I walked inside a mall? It may have been a while ago. But, I remember seeing store closings, and not being able to buy things, because the products were not in stock.

From Payless ShoeSource Inc to Diesel and Topshop in the U.S. – bankruptcies continue to pile up in the brick and mortar retail space this year. There’s also reports of several other major retailers on the brink of insolvency.

A combination of booming e-commerce, brands selling directly to consumers, accessibility and changing consumer behavior has been diminishing mall culture for years now.

A recent Global Advisor Survey of more than 25,000 people across 25 countries shows that half of respondents (51%) say it’s easier to buy goods and services online than it was a year ago.

The scale tips even more in favour of online shopping when you add another 41% of people who say it is as easy to shop online as it was a year ago.

Top countries where it’s easier to shop online:

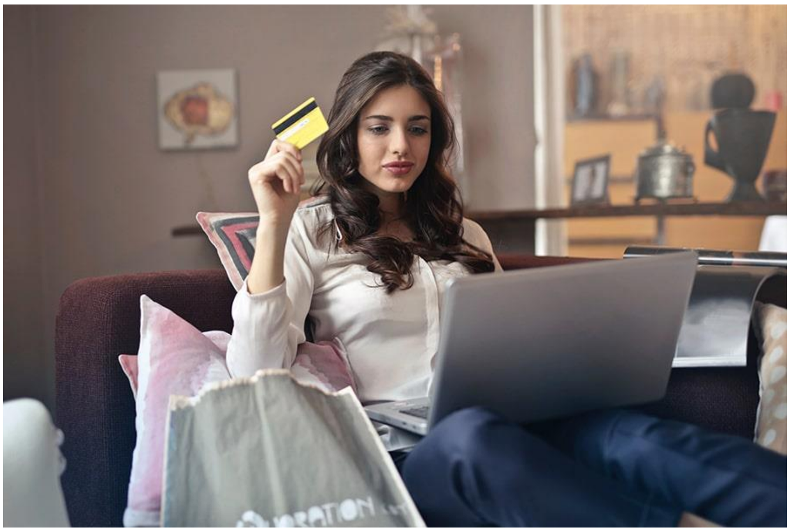
- Kenya, Pakistan (66%)
- Nigeria (63%)
- India (58%)
- Egypt, Indonesia, Mexico (57%)

Malls are “transforming”

Russell Winer, Professor of Marketing at New York University’s Stern School of Business, says malls won’t just disappear because they still provide convenience for shoppers particularly in rural areas, but they are transforming.

“Some parts of the malls are being re-purposed for other uses such as education, ice skating rinks, etc.,” says Winer. “Don't forget that it is still the case that 90% of all purchases are made in bricks-and-mortar stores, according to U.S. government data -- so there are still plenty of stores.

The latest data from the U.S. Department of Commerce shows retail sales rose above forecasts by 0.4% in August from the previous month, driven by auto sales and online shopping. But, sales at general-merchandise stores like department stores and grocery and clothing retailers fell in the same period.



In Britain, retail sales were flat in August compared to a year ago, according to data from KPMG and the British Retail Consortium – marking the second worst reading in the month since records began in 1995.

Bruce Winder, Co-Founder & Partner at consulting firm Retail Advisors Network, agrees malls that are not in large urban centres have had to reinvent themselves, because they've lost major anchor tenants.

"Strong malls are becoming more like experiential marketplaces of old where one goes to the mall for many products, services and experiences in one area," said Winder. "Entertainment, food and exploration as well as product pick up from online shopping become the backbone of many strong malls."

Meanwhile for e-commerce, security fears are not holding back shoppers.

Only 12% of the respondents said they were making fewer online purchases than a year ago in order to protect themselves. On the other end, 15% said they were making more online purchases.

Link physical and digital

John Green, VP of Global Shopper Research at Ipsos US, thinks e-commerce adds two unique dimensions to the retail evolution – it removes geography and adds real-time information.

"Historically we shopped where we lived. The immersion of e-commerce removes that filter and we literally have the world at our fingertips creating significant retail competition for local stares," said Green. "Second… Ongoing improvement in digital systems makes it easier for shoppers to review a broad array of distribution and pricing."

Green also adds that retailers and manufacturers that can create a seamless environment where shoppers can easily move between physical and digital environments will come out on top, including those that use augmented and virtual reality for online shopping.

Winder, meanwhile, points out that online shopping has existed to some degree for 20 years, but we're now at a point where it's started to take market share – particularly from low-margin retailers.

"We have seen more change in the last five years than in the past 20 combined," said Winder. "The birth of digitally native brands has captured the attention and wallets of millennials and Gen Z customers who have started adding their own select stores."

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