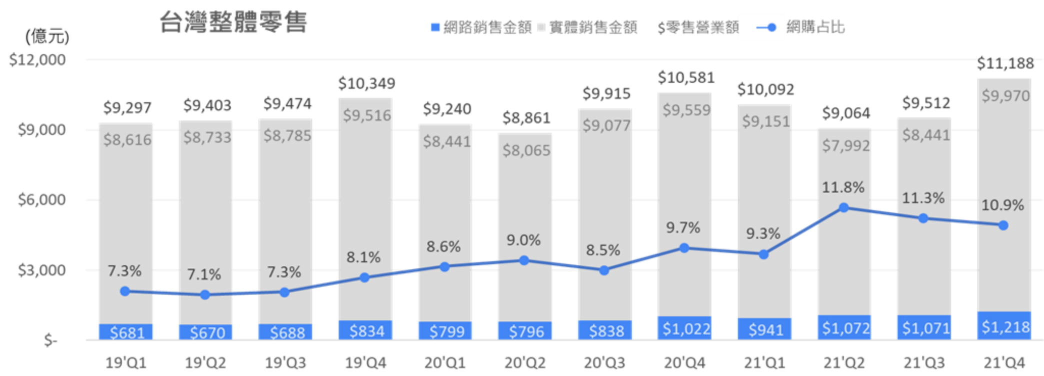
後疫情時代，零售業如何應對

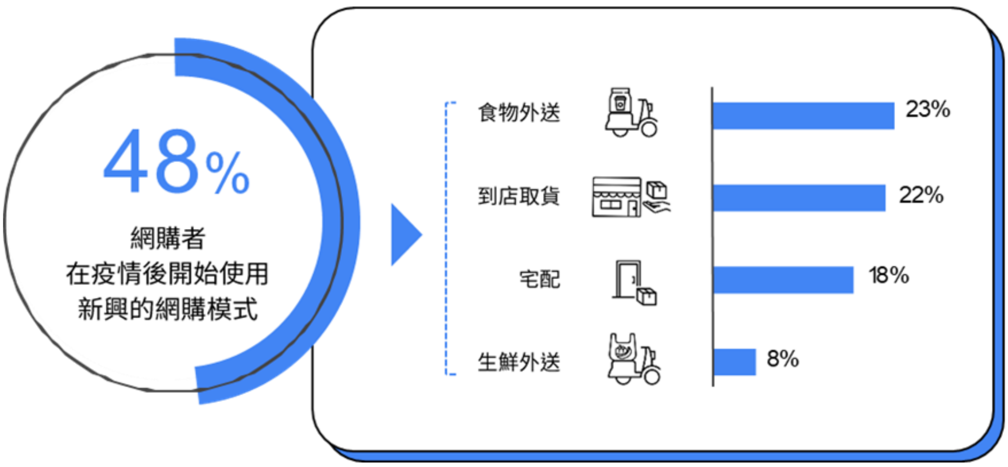
文 | Anita Yang, Associate Director, Ipsos Taiwan

隨著疫苗接種率的提升，各國紛紛解封，全球整體經濟開始走向復甦。行政院主計總處公布 2021 年台灣經濟成長率也來到 11 年新高 6.28%。台灣雖較國際晚一年面對疫情帶來的衝擊，但我們看到消費行為因疫情已逐漸產生變化。經濟部統計處數據顯示 2020 年較 2019 年的網路零售成長近二成（19%），而 2021 下半年更因新冠疫情加速消費者往線上移動。儘管 2021 年零售業仍以實體消費為主，穩定成長 3.3%; 然而值得注意的是網路銷售額出現年增 24.5%的爆炸式成長，其占據整體零售營業額之比重亦持續提升，顯見線上線下全通路佈局已成零售業發展不可逆之趨勢。



當台灣逐漸走出新冠肺炎陰霾，商圈人潮開始回流，消費者會重返以往的實體店面購物嗎？亦或回不去了？從諸多研究結果顯示，儘管社會逐步解封，但消費者已越來越習慣線上購物之模式，後疫情時代的零售業似乎也難以再走回以往傳統的經營模式。

在 2020 TWNIC 台灣網路資訊中心的報告中，82.9%民眾會使用手機上網，上網時段以「不固定時間」的比率最高。每天約花 2 小時於社群互動，其中 94.2%使用 Facebook，其次是 Instagram（39.2%）、LINE（35%）。此外，近五成會在社群平台購物，可見社群平台對消費者購物決策的影響力不容小覷。



疫情也成為台灣數位轉型的催化器，促使實體通路與品牌加速投入電商行列。消費者也因此逐漸習慣於更多元的消費模式，原本對數位網路應用較不擅長的熟齡族群逐步熟悉數位服務的應用。從 Yahoo 奇摩購物數據發現網購開始邁向全齡化，自疫情延燒以來，45～65 歲的中年與銀髮族成長幅度最是明顯，2021 年 65 歲以上銀髮族更持續年增二成。
疫情除了使網購成為全民運動，線上購物也帶動了電子支付的成長。根據金管會最新資料顯示，至 2021 年底電子支付總帳戶約 1,609 萬人，儲值款項逼近 220 億，續寫史上新高，使用電子支付的占比逐月攀升也不出預期。在消費者更熟悉於各種低人際接觸的購買模式之際，零售業者能否及時因應此行為轉變，發展出新的商業模式與行銷策略，和後疫情時代的消費者一起演化，將是零售業未來轉型之關鍵策略。

後疫情時代的實體與網路界線日益模糊，O2O（Online to Offline）模式經營的融合更為加速。許多傳統實體店早將店鋪從線下搬至線上，電商不但與實體通路合作，甚至趁著此波疫情開設實體店面，包括蝦皮、網購化妝品、服飾、虛擬廚房等。不難預見未來虛實融合(Online Merge Offline, OMO)的新零售模式，或「無限貨架」（Endless aisle，又稱虛擬貨架）的全通路整合策略將成為新零售時代勝出之關鍵。

因疫情所衍生的「新常態」來臨，儘管產業回復正常、民眾重新與人連結，但其樣貌與本質皆已從根本改變。對零售業而言，以下四個趨勢洞察值得關注：

消費忠誠降低，品牌價值彰顯有助提升信任

消費者不僅探索網路購物，更在線上嘗試新商店或轉換新品牌。也因社交隔離，迫使顧客在線上與品牌直接進行互動，徹底改變原本行為模式。《2020 智慧消費關鍵報告》顯示近九成消費者在進店前已有屬意的品牌和產品，在購買前亦會上網比價。疫情使熟齡族群對應用數位工具達一定之熟悉度，消費者知道他們可以在網路平台或從親友社群獲得清楚透明之資訊、找到更多的特價商品。該報告更指出，超過五成消費者會花費比以往更多的心力於購買歷程，這也使得顧客更加敏銳且挑剔，對價格的敏感度將使他們只鎖定在那些可以買到划算正品的通路進行購買。

另一方面，我們也看到消費者更會審視「品牌」是否有為世界帶來正面的影響。從今周刊與 Ipsos 2021 年合作的 ESG 永續品牌大調查發現，分別有 53.9%及 53%的消費者在選擇品牌時會考慮企業的環保形象或社會責任。根據 Accenture 最近的全球調查也發現，全球近三分之二的消费者（63%）更願意向與其個人價值觀和信仰相同的公司購買其商品與服務。也因疫情而有超過半數（54%）更願意選擇具永續經營理念企業所推出之商品，且未來可能會持續如此，不難嗅到永續商品可能創造的巨大新商機。

整合線上資源與線下通路的全通路策略，提供顧客無縫的個人化購物體驗

消費者已不再侷限於固定時間、固定場域進行消費，而是無時無刻。購物前的頻繁搜尋比較，也更複雜化了購物行為。無論是「從數位/實體廣告得知商品」、「於官網閱讀產品資訊」、「從眾多資訊平台探索他牌類似功能商品」、「到實體店面確認產品是否符合需求」、「於論壇確認網友評價、參考電商平台價格」，到稍後階段的「直接在網路商店、App 下單，或前往實體店購買」等等。在各種管道多重交錯下，如何讓消費者在整個購物旅程中的各個線上線下接觸點無縫接軌，以創造完美的購物體驗。業者需思考如何透過 AI 賦能、演算法，精準預測消費者感興趣的商品，傳送相對應的優惠券、LBS（Location based service），才能虛實融合（OMO），

驅動全通路成長，為品牌帶來最大效益。

無論虛擬/擴增實境如何演進，電商無法取代線下體驗行銷

實體店鋪也將重新定位，轉為提升消費者體驗的接觸點。實體店所扮演的角色將不全以銷售為主，而是體驗行銷。在消費過程中的參與及感受、店內空間、環境氛圍、享受邊逛邊買、可實際觸摸、可立即擁有、與人的情感連結互動等將會是實體店體驗行銷的核心價值。

善用社群媒體加速購買歷程，落實 OMO 相互導流的加乘作用

社群平台是購買歷程不可或缺的一環，最新 Accenture 研究指出，2025 年全球社群電商的銷售總額將達到 1.2 兆美元，會是 2021 年的兩倍之多。顯示零售業者需思考如何運用社群電商的影響力，善用社群平台助攻以找到對的目標族群。確保潛在顧客在其偏好的管道接收到對的訊息，運用數位工具（如：機器學習）預測最佳銷售時間與價格，並搭配可高度互動的直播與消費者對話，在第一時間展示商品並回應問題，也助於解決部分喜歡宅在家的網購族需求，提供有溫度的線上體驗。

面對後疫情時代的新常態，消費者行為已產生巨大變化，種種購物型態的轉變使零售業者面臨前所未有的行銷挑戰。未來的零售業將朝向更細緻以個人為核心之經營模式及策略思維，以應戰不斷變化的新需求，才能在後疫情時代再創佳績！

Ipsos 益普索市場研究

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How retailers react in the post-pandemic era

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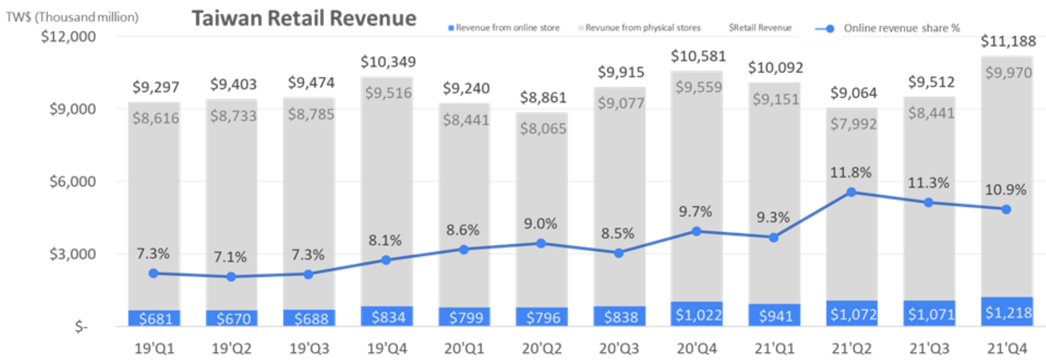
As the vaccination rate grows, the border worldwide has been reopened and the international economy has gradually revived. According to the Directorate-General of Budget, Accounting and Statistics, the GDP growth in Taiwan in 2021 achieved 6.28%, which was the high point in the past 11 years. Although Taiwan faced the challenges of pandemic roughly one year later than other countries, it has been seen that the consumer behaviors have been shifted due to the impacts of COVID-19 since 2020. Based on the data released by the Department of Statistics, compared to 2019, retail e-commerce had expanded by nearly 19% in 2020. Additionally, in H2 2021, the COVID-19 further pushed more customers to online shopping. Despite the steady growth of overall retailers in 2021 with a 3.3% annual growth rate, offline retailers comprised the majority of sales. Nevertheless, e-commerce sales mushroomed explosively, which increased 24.5% annually, and its proportion continuously extended. Omnichannel which covers both online and offline platforms has become the trend in retail.

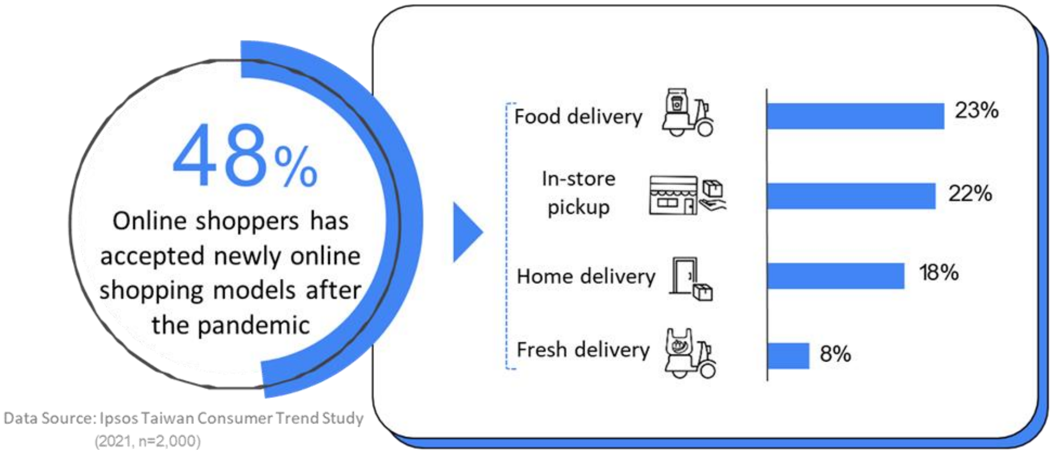


When Taiwan has steadily controlled COVID-19 and consumers have returned to the shopping areas, would consumers return to physical stores as pre-pandemic, or they would not? Multiple studies and research show that, although the government has progressively eased the lockdown restrictions, consumers have already been accustomed to online shopping. Retailers seem unable to return to the traditional business model in the post-pandemic era.

According to TWNIC 2020 Taiwan Internet Report, 82.9% of respondents surf the internet via mobile phones, and there are “no fixed hours “to connect to the internet for the majority of consumers. In average, they will spend around 2 hours on social media, with 94.2% on Facebook, followed by Instagram (39.2%) and LINE (35%), and nearly half have shopped on Social media. It shows that social media has an increasing influence on consumer behaviors and decision makings.

The pandemic is deemed as the catalyst of digital transformation in Taiwan, which motivates offline channels and brands to participate in e-commerce and pushed consumers to get used to diverse consumption patterns. Elder consumers have begun to learn and acquire skills in digital services. Based on the Yahoo! Shopping data, the age groups of online shopping have widened. Since the outbreak of the pandemic, the expansion of mid-aged groups, 45-65 years old, has stood out, and the elder group, over 65 years old, has consistently grown by 20% per annum in 2021.

Google and Ipsos collaboratively published the 2021 Smart Commerce Study, and the study showed that consumers began to attempt new online shopping methods to mitigate the risks of COVID-19, and 77% of Taiwan consumers have downloaded apps released by brands or digital businesses. In addition to the increasing usage rate of digital tools, online shopping methods have become more diverse with various business models like food delivery and in-store pickup.



The pandemic noticeably drives the popularity of online shopping, also encouraging the growth of digital payments. According to the latest data released by the Financial Supervisory Commission, by the end of December 2021, the total users of digital payments were approximately 16.09 million, and the total amount of top-up services reached 22 billion dollars, hitting the historical high. The percentage of digital payments increases month by month. When consumers become more used to the different consumption patterns with minimum contact, the key strategies of retail transformation in the future will be: whether retailers can react to the changes of consumption patterns and develop new business models and marketing strategies?

Post COVID-19, the boundaries between online and offline are becoming blurred, in addition, the O2O business model accelerates the transformation, and numerous traditional physical stores have shifted to the internet. On the other hand, digital businesses collaborate with offline channels, and even some launch offline stores, including Shopee, online cosmetics brands, clothes, and virtual kitchens. It can be expected that Online Merge Offline (OMO) retail business model or endless aisle, will likely be the key to success Omni-channel retailing strategy in a new retailing era.

The changes caused by the pandemic have become the “New Normal”. The industries have returned to the normal standard, people have reconnected, but the essence has drastically differed from the pre-pandemic era. For retailers, there are four key trends and insights:

With decreased customer loyalty, brand core value wins their trusts

During the pandemic, consumers not only have switched to or increased the usage of online shopping, but also explored new stores and brands on the internet. Meanwhile, social isolation forced customers to interact with brands online and fundamentally transforms their behaviors,. 2020 Smart Commerce Study indicated that nearly 90% of consumers have decided brands and products in mind before entering the stores, and they researched and compared prices online in advance. The pandemic also helped the elder consumers about their familiarity with digital tools and applications, and consumers now are aware that they can grab clear, transparent info and more discounted products via the internet or personal network. Moreover, the study indicated that more than half of consumers spend much efforts on purchase journey. This makes the customers pickier and sharper, and their sensitivity towards price guides where they can get best deals on genuine brands.

On the other hand, consumers tend to evaluate the brand if it brings positivity to society. Based on the ESG branding survey conducted by Businesstoday and Ipsos in 2021, 53.9% and 53% of consumers value the brand's green image and CSR, respectively, while choosing the brands. Furthermore, according to the global survey conducted by Accenture, nearly two-thirds (63%) of consumers are more willing to purchase goods and services from companies with similar values and beliefs as theirs. 54% are more inclined to sustainable goods, and this preference is likely to continue in the future. Hence, sustainable products/brands may present huge business opportunities.

Omni-channel strategy, integration of online resources and offline channels provide seamlessly personalized shopping experience

Consumers nowadays are no longer bounded with shopping at a fixed time or fixed locations; instead, they now consume every time and everywhere. Frequently research and browse before shopping, which complicates the consumption patterns. The customer journey revolves from knowing the products from digital or traditional ads, understanding the product features on the website, exploring other feature-alike products via multiple information sources, evaluating the products in stores if matching the needs, reading reviews on forums, cross-checking the prices on e-commerce platforms, then to purchasing from online stores, apps, or directly from stores. Under this multilayered journey with multiple channels, touchpoints play a critical role. The seamless collaboration between online and offline channels, including offline stores, online stores, social networks, and customer service, provides a personalized shopping experience to the customers. Businesses can add values via AI, apply algorithms to accurately anticipate the desired products, and send relevant coupons and location-based service (LBS). OMO will drive the greatest business growth to the brands with omnichannel integration.

Regardless the development of VR and AR, offline experiential marketing is non-replaceable by e-commerce

Physical channels will re-position to be the touchpoint to improve the customer experience. This means that offline channels are much more than sales. Experiential marketing will be the core value provided by offline channels, which includes the engagement and feelings during purchase, the in-store space and atmosphere, enjoyment of shopping, touchable, visible, ready-to-have products, and emotional connections with people.

Capitalize social media to hasten the customer journey and implement the interconnected OMO synergy

Social media has become a crucial part of the customer journey. According to the latest study conducted by Accenture, the total sales amount of social commerce will reach 1.2 trillion US dollars in 2025, which is more than doubled in 2021. This points out that retailers should reflect on how to reach the correct target audience with the supports from social commerce and social networks, and to ensure potential customers receive correct information via their preferred sources. Meanwhile, the utilization of digital tools (e.g., machine learning) can help predict the best time and price for selling, and with a highly interactive live stream, which can directly communicate to the customers and rapidly respond to their questions, can expand the business to the stay-at-home economy. The provision of a warm-hearted online experience creates value and benefits to grasp future opportunities.

With the new normal in the post-pandemic era, consumer behavior has significantly changed. The transformation of numerous consumption patterns and shopping styles has brought unprecedented marketing challenges to retailers. Retail in the future will shift to the more deliberately designed individual-oriented core value to adjust its business models and strategies to react to the ever-changing customers' needs for better performance in the post-pandemic era!

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