2019 APAC Retail Tech Trends to Shape the Customer Experience
2019 年 APAC 零售技術趨勢塑造客戶體驗

1. What key trends do you see playing out in the APAC retail tech scene in 2019?
2019 年亞太地區零售技術領域的主要趨勢是什麼？

Following the success experienced particularly by e-commerce players in 2018, we foresee the retail scene further leveraging double digit dates (e.g. 9/9, 10/10) platforms to launch sale events. From a consumer's point of view, such double digit dates are easy to take note of especially if they have a product in mind to purchase.

For retailers, it means they need to take more measures to cut through the noise and that is achieved by a greater reliance on data analytics software to collect and analyse customer data, such as shopping behavior, buying history and more, so that highly personalised and relevant offerings can be created and delivered.

At the same time, building brand loyalty will be another key area for retailers and it is important to accept that merely slashing prices will not be a sustainable long-term strategy to retain customers. According to our SAP CX Consumer Propensity Study 2018, more than half of APAC online shoppers abandon their online shopping charts sometimes or all the times even though discounts are offered. Instead of slashing prices to hook consumers, businesses should analyse online cart data to gain a better sense of the customer journey.

Lastly, we believe adoption of AR/VR technology by retailers will increase in order to assist consumers in picturing how products will look and work in real life. This is in line with research from IDC which predicts that AR/VR spending will almost double from US$27 billion in 2018 to US$53 billion by 2022. Such spending is led by the consumer industry followed by retail.

繼 2018 年電子商務運營商取得成功之後，我們預計零售業將進一步利用兩位數日期（例如 11/11, 12/12）平台推出銷售活動。從消費者的角度來看，這樣的雙位數日期很容易記錄，特別是如果他們有購買產品的話。

對於零售商而言，這意味著他們需要採取更多措施來消除噪音，這是通過更加依賴數據分析軟件來收集和分析客戶數據（例如購物行為，購買歷史記錄等）來實現的，這樣才能實現高度個性化和可以創建和交付相關產品。

與此同時，建立品牌忠誠度將是零售商的另一個關鍵領域，重要的是要接受僅僅削減價格不會成為留住客戶的可持續長期戰略。根據我們的 SAP CX 消費者傾向調查 2018，超過一半的亞太地區在線購物者有時或者所有時間都放棄了他們的在線購物圖表，即使提供折扣。企業應該分析在線購物車數據，以更好地了解客戶的旅程，而不是削減價格以吸引消費者。

最後，我們相信零售商採用 AR / VR 技術將會增加，以幫助消費者描繪產品在現實生活中的外觀和工作方式。這與 IDC 的研究結果一致，後者預測 AR / VR 支出將從 2018 年的 270 億美元增加到 2022 年的 530 億美元。這種支出主要來自消費行業，其次是零售。

2. What lessons should retail brands in APAC take away from 2018, and improve on for 2019?
亞太地區的零售品牌應該從 2018 年開始汲取什麼教訓，並在 2019 年進行改進？

The biggest lesson that retailers in APAC can learn is to simply give what consumers wish for. By Jennifer Arnold, VP of Marketing, Asia Pacific Japan and Greater China, SAP Customer Experience, our SAP CX Consumer Propensity Study found that the top three ways APAC consumers wishes for brands to enhance the online shopping experience are: easy exchange and return services (56%), comparison tools to compare prices and

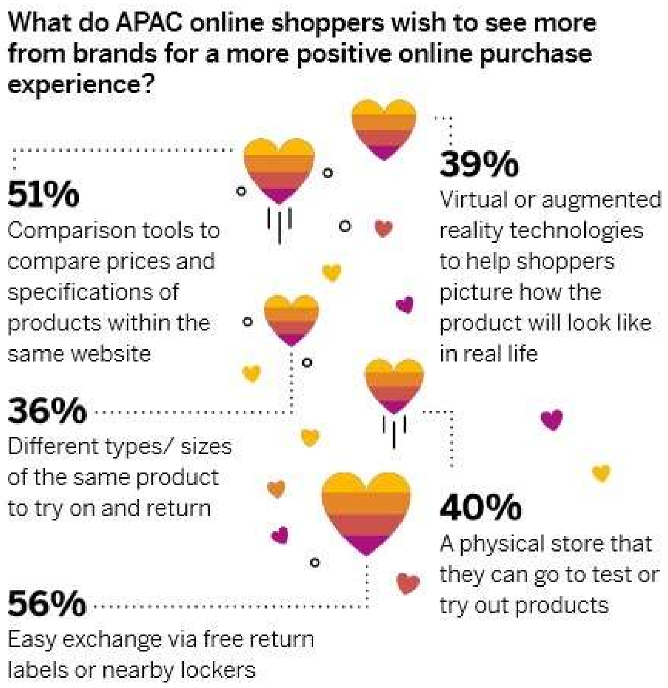
亞太地區零售商可以學到的最大教訓就是簡單地給予消費者的期望。SAP 客戶體驗亞太地區市場副總裁 Jennifer Arnold 指出，我們的 SAP CX 消費者傾向研究發現，亞太地區消費者希望品牌提昇在線購物體驗的前三種方式是：簡單的交換和退貨服務（56%），比較價格和產品規格的比較工具(51%)和實際的實體店測試產品(40

specifications of products (51%) and an actual physical store to test out products (40%). From our observation, only a handful of APAC brands are offering all three today.

%）。根據我們的觀察，今天只有少數亞太品牌提供這三種品牌。

The top two wishes can be achieved by creating an arrangement with logistical partners and working with technology solution providers. In regard to providing physical stores, retailers can either create a bricks-and-mortar store, set up a short-term pop-up or a rent a dedicated space in another retail store. To further add, retailers can to create a memorable, interactive experience for consumers in these physical locations, such as offering free yoga classes to sell athletics gear or offer a reading by an author to sell books.

通過與物流合作夥伴建立安排並與技術解決方案提供商合作，可以實現前兩個願望。在提供實體店方面，零售商可以創建實體店，設置短期彈出窗口或在另一個零售店租用專用空間。為了進一步增加，零售商可以為這些物理位置的消費者創造一個難忘的互動體驗，例如提供免費瑜伽課程來銷售田徑裝備或提供作者閱讀以出售書籍。



3. **There has been quite a bit of focus on the direct-to-consumer (DTC) model in Europe. Do you see this gaining similar momentum amongst brands in APAC? If not/so, why?**
   歐洲的直接面向消費者（DTC）模式已經有了相當多的關注點。你認為這在亞太地區的品牌中獲得了類似的動力嗎？如果不是/為什麼？

There are numerous benefits of the DTC model such as full control of in-store experience which enables retailers to build strong relationships with customers, opportunities to directly collect relevant customer data, and the ability to control pricing structures through the removal fixed costs.

DTC 模型有許多好處，例如完全控制店內體驗，使零售商能夠與客戶建立牢固的關係，直接收集相關客戶數據的機會，以及通過移除固定成本來控制定價結構的能力。

The DTC model is already gaining momentum in the region, with many brands offer direct e-commerce websites in order to engage local online shoppers and provide a different experience from their marketplace offerings. With brands being more conscious about their value chain and e-commerce solutions becoming more advanced, the primarily online-first DTC model will see great success in APAC especially with the region leading the globe in e-commerce growth.

DTC 模式已經在該地區獲得動力，許多品牌提供直接的電子商務網站，以吸引本地在線購物者，並提供與其市場產品不同的體驗。隨著品牌更加關注其價值鏈和電子商務解決方案變得更加先進，主要在線優先的 DTC 模式將在亞太地區取得巨大成功，特別是該地區在電子商務增長方面領先全球。

4. What are key benefits, as well as challenges, that retail brands face if they choose to establish their own online site, delivery service, and marketing/communications, rather than go through an aggregated site such as Lazada and Amazon?
如果零售品牌選擇建立自己的在線網站，交付服務和營銷/通信，而不是通過像 Lazada 和亞馬遜這樣的 Marketplace 網站，那麼零售品牌面臨的主要好處和挑戰是什麼？

The biggest draw of going through aggregated sites is the huge pool of established customers that they already have. Aggregated sites tend to have copious resources and power to carry out robust marketing and brand awareness campaign. This coupled with the convenience of accessing the 'stores' of many brands in a single place helps to draw more customers than a single stand-alone site. Secondly, these aggerated sites make it easy for sellers who do not want to worry about packing and shipping their products as this is taken care of.

On the flip side, a typical brand faces intense competition in standing out on such sites. For instance, Amazon has more than five million marketplace sellers while Lazada has 400,000 sellers. This gives advantage to the DTC model where brands can have more leeway to offer personalised shopping experiences. This is because the data obtained from shopper browsing or purchase history can be used to fashion an engaging customer experience for each individual shopper. A brand with its own site and delivery services is also more likely to deliver their products within the promised timeline during busy periods than through an aggregated site.

Brands that choose to go for DTC need to ensure that they have enough funds to build a site, drive traffic to it, and support the overheads. Their delivery services must also be able to scale according to demand.

通過 Marketplace 的最大吸引力是他們已經擁有的大量已建立的客戶。聚合網站往往擁有豐富的資源和權力，可以開展強大的營銷和品牌宣傳活動。這與在一個地方訪問許多品牌的“商店”的便利性相比，有助於吸引更多的客戶而不是一個獨立的網站。其次，這些集中的網站使賣家不必擔心包裝和運輸他們的產品，因為這是照顧。

另一方面，一個典型的品牌在這些網站上脫穎而出，面臨著激烈的競爭。例如，亞馬遜有超過 500 萬的市場賣家，而 Lazada 有 40 万賣家。這為 DTC 模式帶來了優勢，品牌可以有更多餘地提供個性化購物體驗。這是因為從購物者瀏覽或購買歷史獲得的數據可用於為每個購物者塑造引人入勝的顧客體驗。擁有自己的網站和交付服務的品牌也更有可能在繁忙時段內通過承諾的時間線交付產品，而不是通過 Marketplace 網站。

選擇去 DTC 的品牌需要確保他們有足夠的資金來建立一個網站，增加網站流量，並支持管理費用。他們的送貨服務也必須能夠根據需求進行擴展。

5. What's still missing/needs further improvement in the e-commerce supply chain and online customer experience? What technologies/tools should retail brands look at to plug these gaps?
什麼仍然缺失/需要進一步改善電子商務供應鍊和在線客戶體驗？零售品牌應該採用哪些技術/工具來填補這些空白？

With supply and logistics decisions directly impacting sales, retailers must integrate all back and front office systems each step of the customer journey, from gathering information and considering options, to selecting, to handling payment, to receiving the goods, to accessing ongoing service and support. This is crucial because our SAP Consumer Propensity Study revealed that more than one-third of APAC shoppers abandon their online carts due to out-of-stock items, while 28% do so because of longer-than-expected delivery times.

由於供應和物流決策直接影響銷售，零售商必須在客戶旅程的每個步驟中集成所有後台和前台系統，從收集信息和考慮選項，到選擇，處理付款，接收貨物，訪問持續服務和支持。這一點至關重要，因為我們的 SAP 消費者傾向調查顯示，超過三分之一的亞太地區購物者因缺貨而放棄了他們的在線購物車，而 28%的購物者因為交貨時間超出預期而這樣做。

This call for greater need of advanced data management and analytic tools that will allow retailers to gain insights on consumer behaviours, economic factors, weather patterns, cultural trends, and so on. These components help businesses to make decisions in the moment about pricing, stock determinations, promotional offers, marketing campaigns, and more.

這需要更高級的數據管理和分析工具，使零售商能夠深入了解消費者行為，經濟因素，天氣模式，文化趨勢等。這些組件可幫助企業在當下制定有關定價，庫存確定，促銷優惠，營銷活動等方面的決策。

SAP Customer Experience

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