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College of Commerce

National Chengchi University

碩士論文

Master's Thesis

Amazon.com 在台灣的市場研究

Amazon.com Market Research in Taiwan

Student: David Mao

Advisor: Professor Jack Wu

中華民國一〇二年六月

June 2013

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Executive Summary

Amazon.com, the world's largest online retailer has never set a foot here in Taiwan, where the market is strong and potentials are high. In this paper, we will discuss how online shoppers are like in Taiwan with 7,685 responded samples in regards to shopping experiences, amount of money spend yearly online, brand images, logistic expectations, and mobile purchase intentions. With these data analysis and consumers behavior trend, we hope to give the big picture of Taiwan market to Amazon.com executives and to have them setup operation here before it's too late.

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1. Introduction

This report presents the results of a market research study conducted in February, 2013 by Market Intelligence & Consulting Institute. The goal of the study was to examine the online shopping experienced by users in Taiwan, the methods of the purchases, the reason of the purchases, the options of buying overseas using foreign online retailers and purchases done by using mobile devices. There are many online shoppers in Taiwan waiting for Amazon.com to open regional online store to better enhance their shopping experience with Amazon. The objective of this report is to assess consumer perceptions of Amazon.com for online shoppers in Taiwan market.

This report describes data analysis methodology and presents the results of the analyses. The organization of the report is as follows.

- Section 1 describes the data collection, as well as a demographic profile of the sample.
- Section 2 shows the methods of the purchases, the expenses on online purchases, as well as the reasons of the purchases
- Section 3 addresses the categories of the purchases and the type of services
- Section 4 addresses the delivery expectations, purchase experiences, and 'Groupon-like' acceptance and reasons
- Section 5 shows how likely consumers will use mobile devices for online purchase
- Section 6 describes other factors such as logistic and regulation
- Section 7 shows the Amazon Web Services potential in Taiwan
- Section 8 illustrates Amazon.com's position, relatives to other foreign online retailers
- Section 9 discusses and summarizes the results and describes Amazon.com's market

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position in Taiwan.

These sections are followed by recommendations to the marketing committee of Amazon.com

1.1. Data Collection

The Market Intelligence & Consulting Institute was established in 1987, and is a division of Taiwan’s Institute for Information Industry which was incorporated in 1979, through the joint efforts of public and private sectors, as a Non-Government Organization to support the development of information industry as well as information society in Taiwan. The MIC conducts a yearly national wide survey on online purchase for the past few years and for 2013, the survey sample size has reached 7,685 with age group from 10-14 to above 65, personal budget range from below 999NTD to above 100,000NTD and covers the nation in demographic area. [1]

1.2. Description of the Sample

The survey conducted by MIC is done by online survey in February 2013, towards with a valid sample size of 7,685 online consumers. Their Sex and Education range are in Fig. 1.1

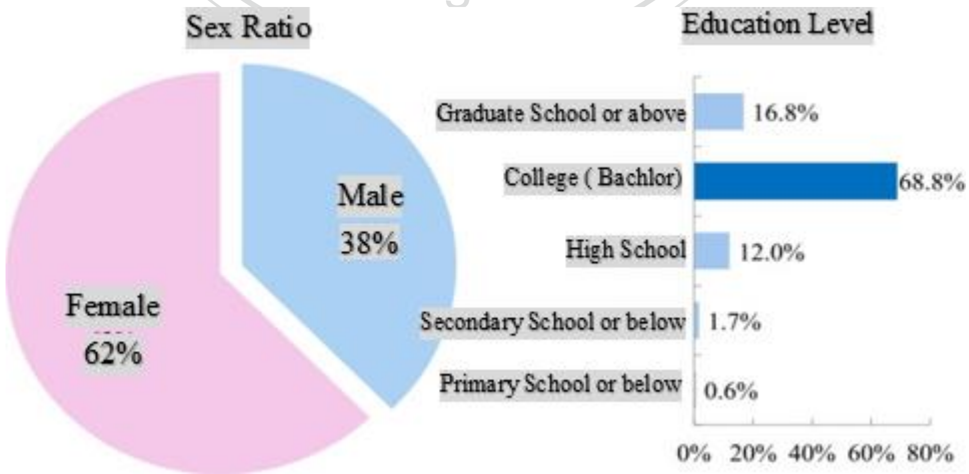

Fig. 1.1

This shows that women are the dominate online consumers who makes the purchase and a huge 68.8% percent of these shoppers have a college degree. We then look at age and geographic data, shown in Fig. 1.2

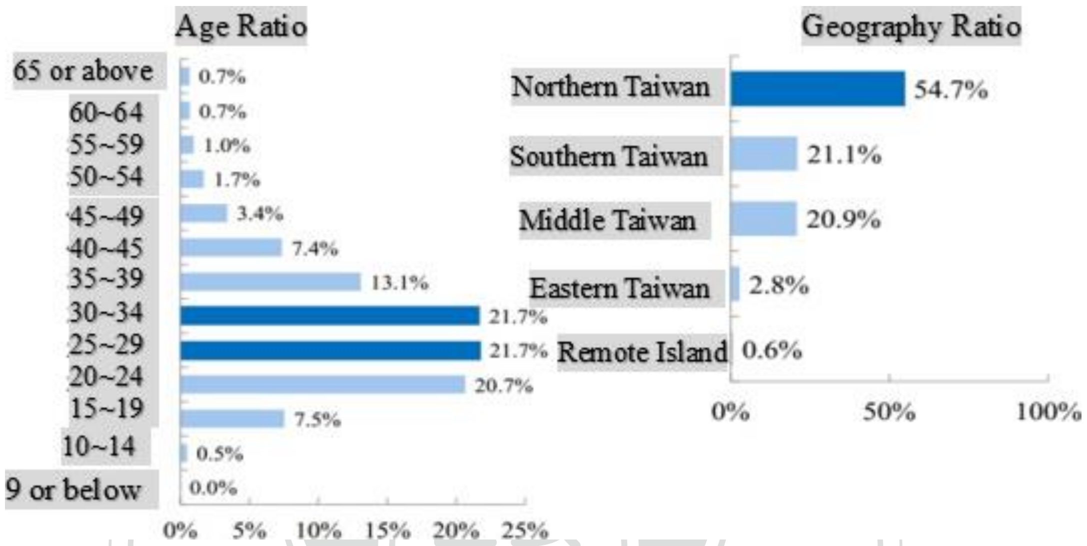

Fig. 1.2

From Fig. 1.2 we can see that 54.7 % of online consumers are from the northern region of Taiwan and a mere 0.6% of shoppers are from remote island which is very different from the traditional concept that more remote area would utilize online shopping and shipping as a method to buy products, which we will discuss about later in logistic section. We also can see that a great section of consumers fall in the age group between age 20~40, a dominate 64.1% of them so we can assume that this segment of online consumers are most comfortable with online purchases and have the purchase power. We can also see another trend that although only 7.5% of consumers falls between age 15~19 but they should be the group that are most comfortable with online shopping, it would be their financial ability that prohibited their online shopping experience and lack of priced commodity that fits their purchasing power. [2]

As we get to know our online consumers more we would like to know their marital status and

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occupation as its essential for us to know if these online shoppers will be purchasing more family orientated products, personal products and their occupations. We then look at Fig. 1.3

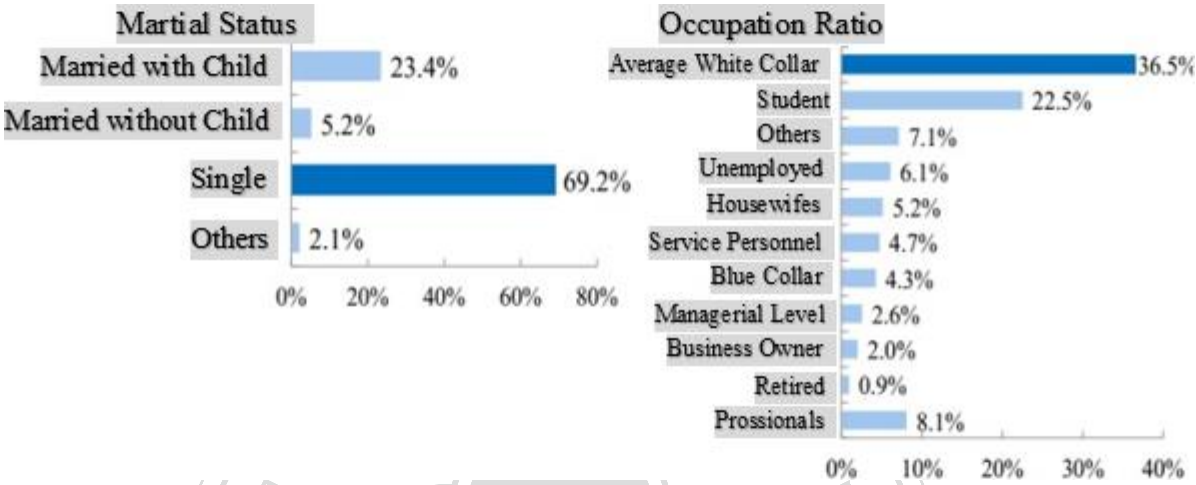

Fig. 1.3

We can see from Fig. 1.3 that most online shoppers falls in the Single category with a 69.2% but when we look at the married category, we see a major difference between Married with No Children and Married with Children, a 18.2% difference, this tells us that parents are more willing to spend money online to have purchased good shipped directly to doorstep and spend more time with the family. Although consumers in the Single category seems to have more buying power to spend on themselves or on others, we should really look at the Married with no Children category because it’s got a big potential in such category like leisure travel ticketing or other leisure items suitable for couples without children or older aged couples with children already financially stable. In the Occupation section, we see that White Collar and Students makes up more than 59% and 8.1% under Professional category from this we can assume that most of consumers from these categories have the time and access to online shopping and have the purchasing power as the reminder of the market is spread evenly with other categories.

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2. The Environment around Online Shopping

With Taiwan being ranked as 16th most densely populated country in the world with an average population density of 642/km^2 or 1,664/miles^2 and with over 9,800 convenience stores on the island in an area of 35,980km^2 and a population of 23 million, Taiwan has Asia Pacific and perhaps the world's highest density of convenience stores per person: one store per 2,346 person. Compare with the world average of 6,000 residents per store, Taiwan's convenience store really has a great impact to daily shopping experience even affects the online shoppers. Almost every major online shopping sites have the option to deliver the packages to a convenience store and pay through their POS system. Thus creating a great deal of convenience to shoppers without credit cards or afraid of identity theft or for other reasons.

What are the incentives for online shoppers here in Taiwan? We have talked about the avoidance of credit card theft when utilizing the convenience store's POS so concerned shoppers can have the options not to pay online first, but what or why they shop online? Here we have fig. 2.1 to show some ideas.

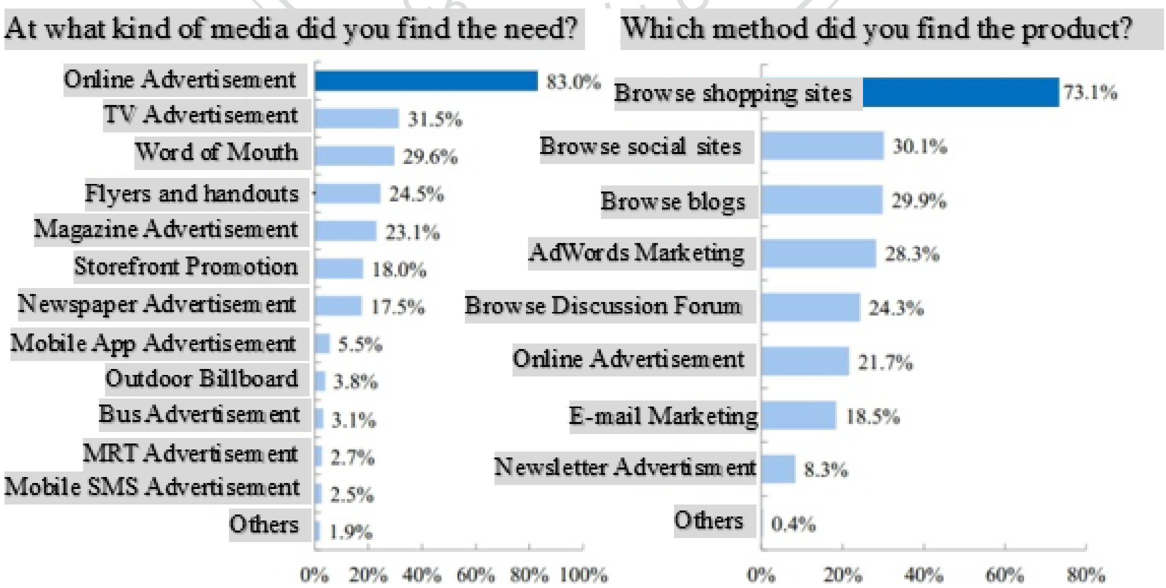

Fig. 2.1

Here we see that on Fig. 2.1 Internet advertisement is still dominating with online shoppers at 83% and Television (31.5%) and Word of Mouth (29.6%) is still a strong indicator for online shoppers to help make their decision and 73.1% of online shoppers would go straight to online stores first to check out details about it and doing some researches from online social media, blogs, and online forums to maybe discuss about the products interested.

How much time do online shopper would spend online searching for their unique products? Are they the normal people or are they extensive internet users? Here we see on Fig. 2.2

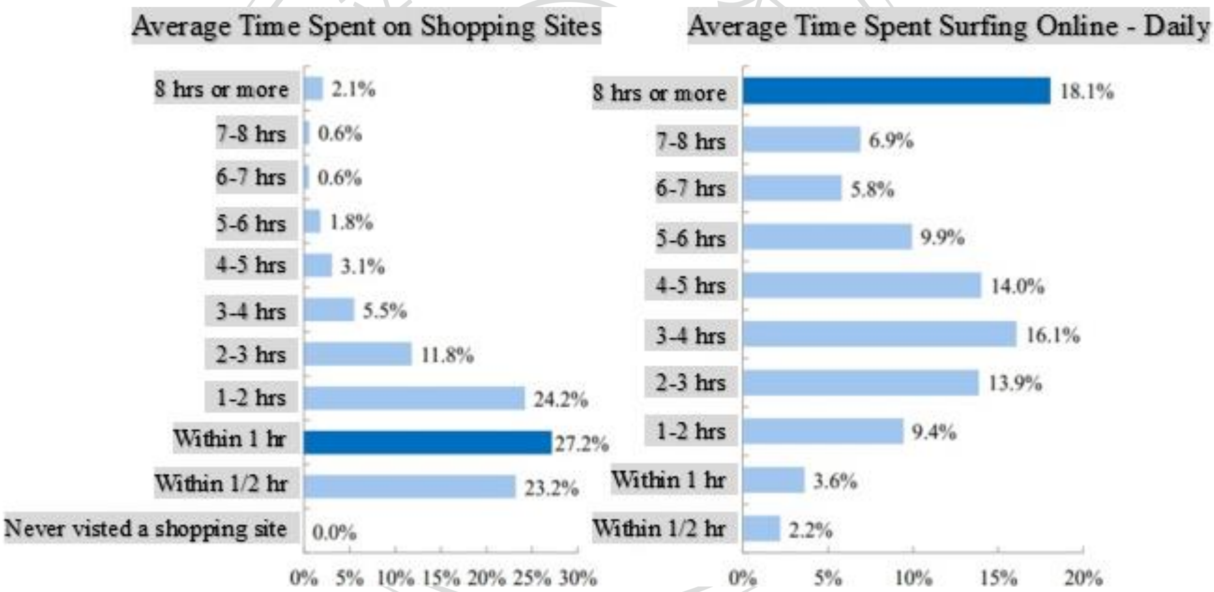

Fig. 2.2

Here we see that the majority of the sample size would spend less than 2 hours (74.6%) online on shopping sites and decreases rapidly after 2~3 hours from 11.8% to 5.5% for 3~4 hours. We can also see that the majority (44%) of the sample size would spend on between 2~5 hours online per day. Comparing the two, we can say that the thread for average shopper to spend on average of less than 2 hours on shopping sites.

3. The Categories of Purchases

Some shoppers would go online do some homework on the products they are interested and so some price comparison online before going out and buy at the store, this is most apparent in two categories, Daily Supplies and Computer and Related Parts in Fig. 3.1.

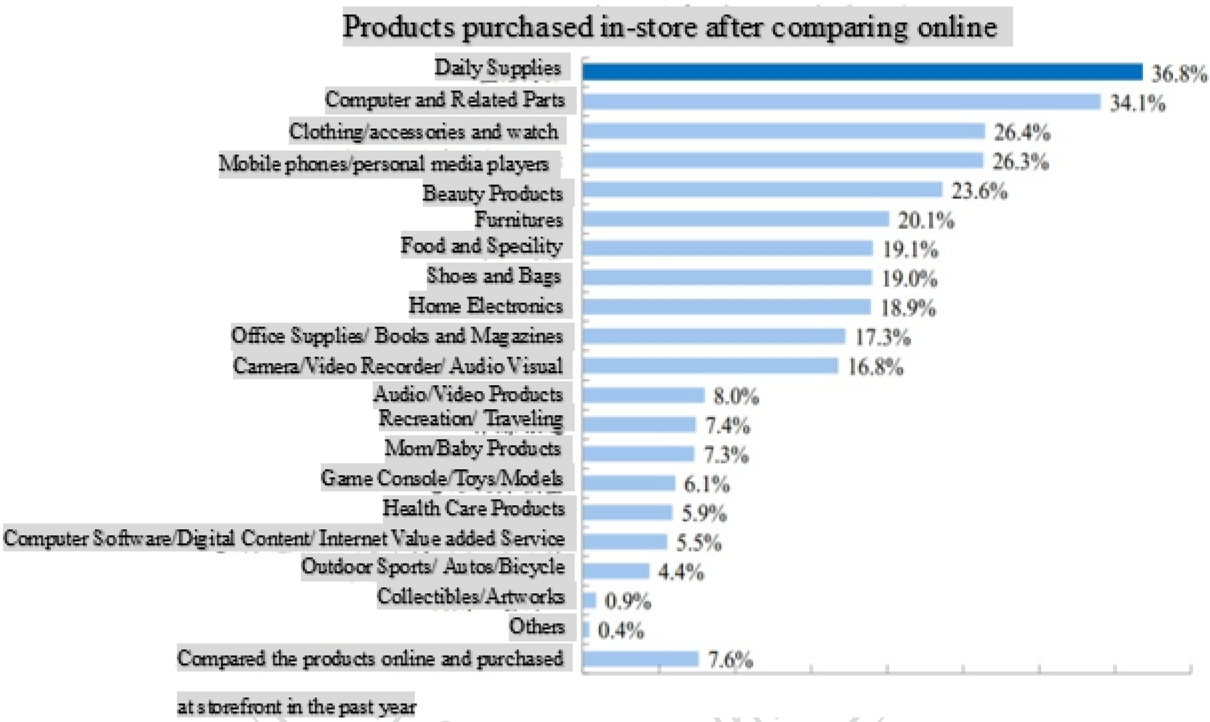

Fig. 3.1

We see that Daily Supplies (36.8%) are the category most likely to be compared between physical and online stores and second to that are the Computer and Related Parts (34.1%). Here we see a big difference in the price range, Daily Supplies are normally priced under 3,000NTD and Computers and Parts are normally priced between 10,000NTD and 40,000NTD, so here we see that online shoppers are very sensitive to pricing fluctuation. Another thing we see here is the top 5 categories (Daily Supplies, Computer and Parts, Clothing/accessories and watch, Mobile phones/personal media players, and Beauty Products) are personal related, an indicator that relates to Fig. 1.3 that 69.2% of online shoppers are Single.

We then ask the interviewee what was the main reason for making the purchase at the physical stores. In Fig. 3.2, we see a great number of consumers wanting to see the actually products before purchase, 71.2% and another 50% of consumers wanting to get the products ASAP without any possible delay from logistic and another 38.9% of consumer that want pay for extra shipping. While a quarter of consumers, 25.5% says it's easier to buy the product at the physical stores but only 19.6% of the consumers say it's cheaper to buy at the physical stores so here we can view the trend that 1. Taiwanese online shoppers still want to see the physical products before making purchases. 2. The urge of getting the products on hand is also a factor to consider. 3. Shipping cost may be an issue here as some consumers might think it's not necessary to pay such high cost in the metropolitan area.

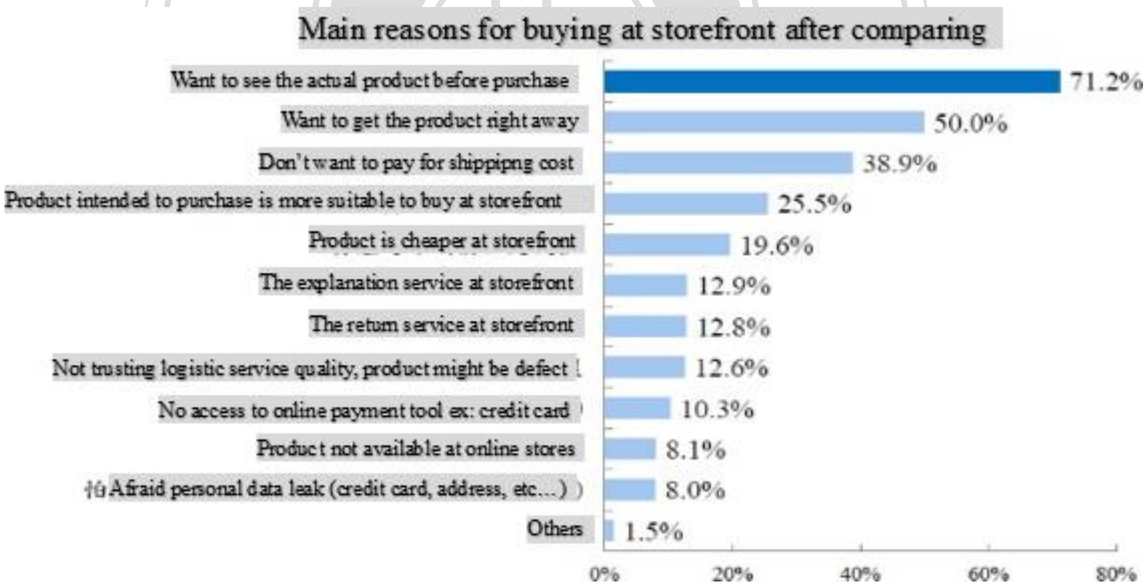

Fig. 3.2

The survey also provided a Licker Scale Survey on "Online Shopping". We can see that in Fig 3.3 that 44.2% of consumers 'Disagree' with 12.8% 'Strongly Disagree' and 21.2% 'Mutual' on paying extra on product for easy shopping experience and vice versa we have 31.3% of consumers on 'Strongly Agree', 48.8% of consumers on 'Agree' and 14.6% on 'Mutual' for spending more time in comparing to save money. This subconsciously wanting to save more by spending more time comparing is not uncommon in Asia culture let alone Taiwan.

Many of the consumers responded wanting the Virtual Sites to have physical stores (45.9% Agree & 24.9% Strongly Agree) so Return and Exchanges (44.8% Agree & 27.5% Strongly Agree) won’t be as troublesome and easier to view actual product if on display (50.3% Agree & 27.6% Strongly Agree).

Fig. 3.3

For this we can see that the expectation of consumers are still traditionally minded that they want to see the product first before making the order, I suspect that an online services like Zappos.com, first overcoming some logistic problems and regulations (we will talk about it later) would open a new horizon for online consumers.

4. The Purchase & Delivery Expectations and Groupon

We all know that online shopping is a big business, but how deep are the pockets of the consumers while shopping on virtual stores when their traditional mindset is a convenience store right within walking distance? In Fig 4.1 we ask how much money have the interviewees paid within a year during online shopping. [3]

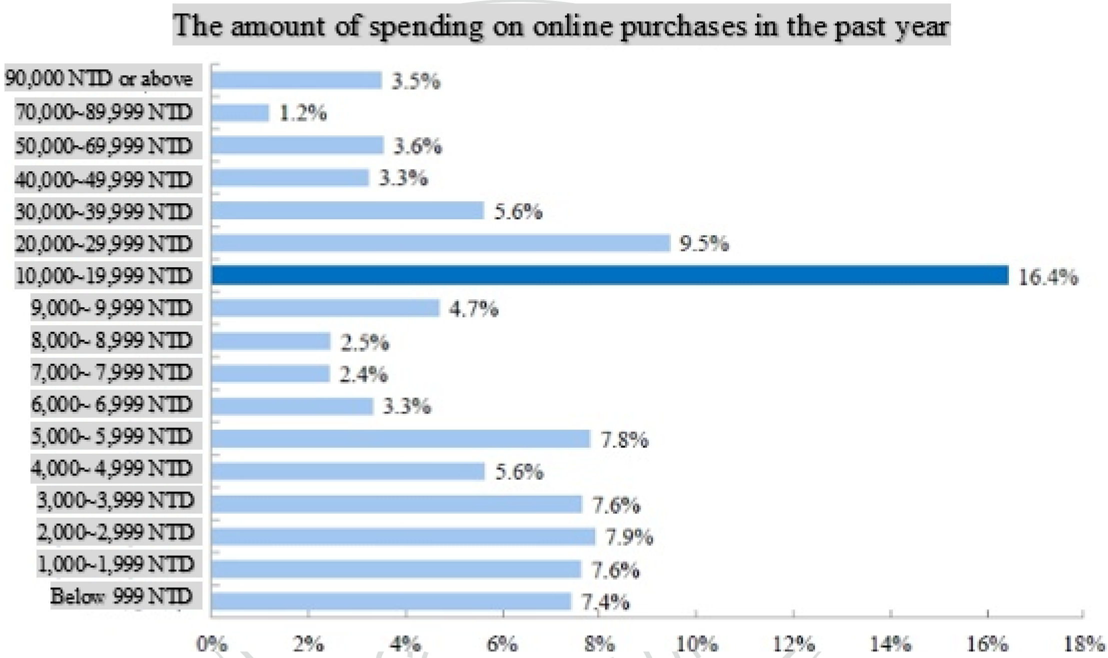

Fig. 4.1

Although the first 4 groups are pretty even, between 7.4%~7.9% from ‘Below 999NTD’ to ‘3,000~3,999 NTD’. As the price goes higher, the percentile ranges towards the lower from 2.4% to 7.8%, but as the price mark breaks 10,000~19,999NTD we have a dominant 16.4% in this category and a 9.5% in 20,000~ 29,999NTD, presumably the Computer and Related Parts. Even as the price goes higher, the percentile doesn’t diminish and still continue to have shoppers purchasing in higher price categories. With previous findings we can see that the pattern for shoppers to buy computer related or high priced electronics are strong and a solid base of consumers buying the daily supplies.

Once the purchases are made, consumers have a really high expectation on product arrival time because of the demographic and geographic factors that Taiwan is an island with really high population density, 643 citizens per square kilometers, 17th highest in the world. In Fig. 4.2 we can see that majority of consumers 62.7%, expects the delivery timeframe falls between 1~3 days. Some remote area and island residents do expect longer delivery date.

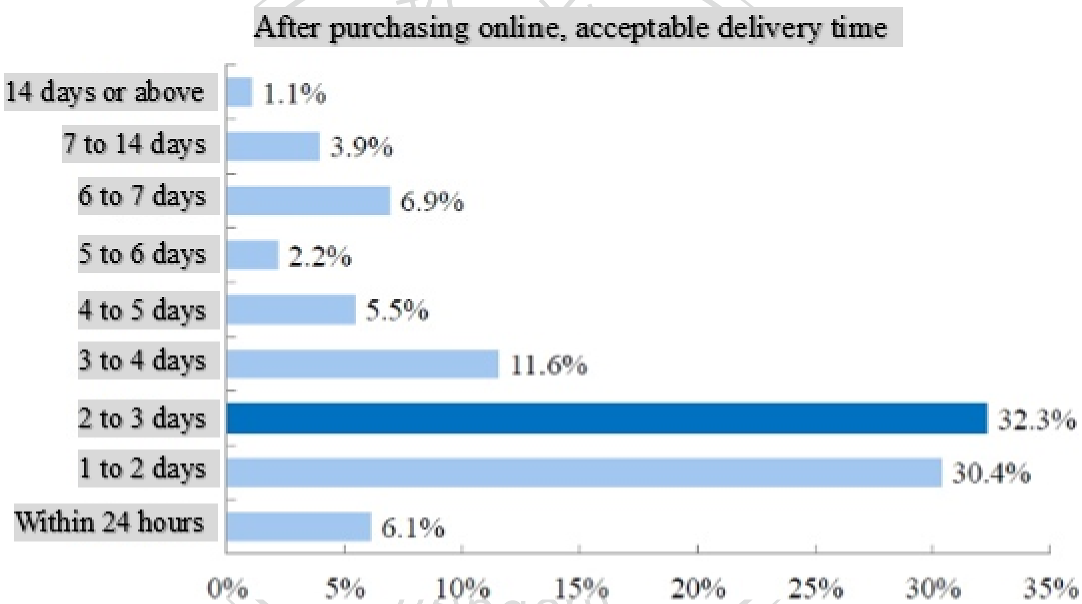

Fig. 4.2

The survey also questions interviewees on behaviors towards online purchase, the methods and behaviors. Although Online Auction had its peak in Taiwan, still a vast numbers of consumers find their products in the Online bidding sites with 48.3% but the real majority is the direct purchase from virtual site with 79.8% of consumers. In Fig. 4.3, we see some behavior and method that are newly developed within the past two years.

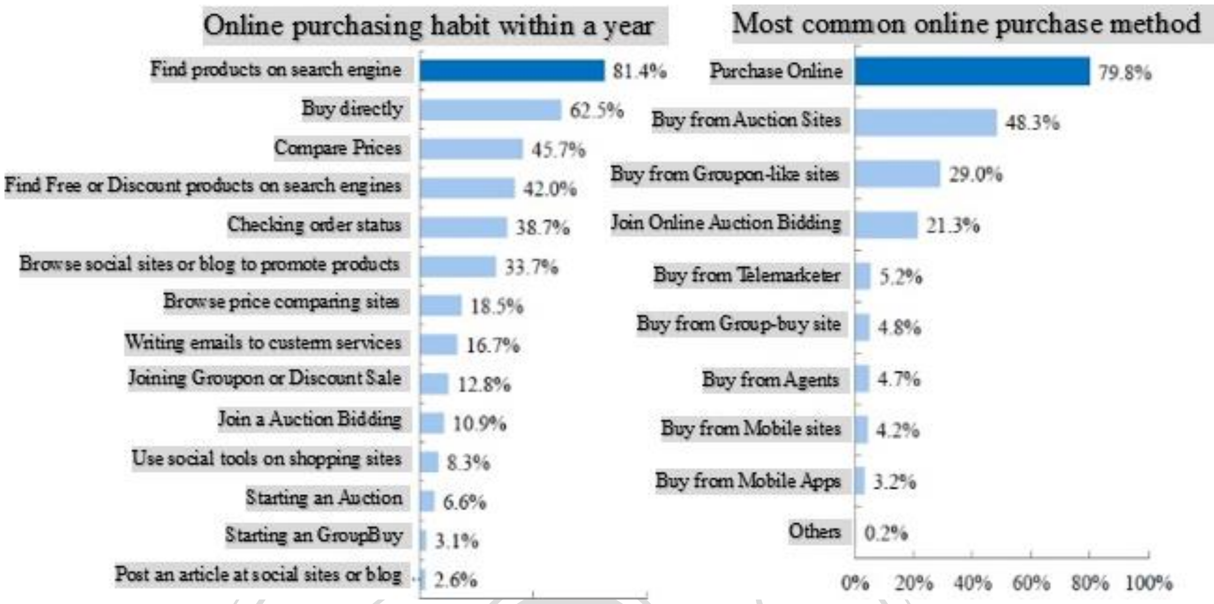

Fig. 4.3

In the recently years, we have a new trend of online shopping, Group Buy or Groupon, meaning a group of shoppers intentionally team up to negotiate with Online Suppliers/Vendors to buy in bulk so to lower the cost by having higher demand. With 12.8% of consumers answering that their new purchase behavior is to find and join a Group Buy for a product they are interested and 3.1% of consumers starting a Group Buy of their own to attract other shoppers to join. With this new mindset, when shoppers pick what method to shop, 29% of shoppers pick Online Group Buy as an option and 4.8% of shoppers starts looking for Groupon-like sites to start their online shopping search. Group Buy has become a real trend here in the metropolitan city like Taipei City white collar group as one of the Groupon-like site, GOMAJI, not only surpass its goal of 1 billion NTD set for 2012, it doubled its income from 800 million NTD in 2011 to 1.2 billion NTD in 2012, taking a whopping 40% of the 4 billion NTD market in Taiwan and the market lead since June 2012 in Fig. 4.4. [4]

	團購網	5月 購買總人數	5月 平均單價	每檔 平均銷量	5月 業績(萬)	6月 購買總人數	6月 平均單價	每檔 平均銷量	6月 業績(萬)	6月和5月 比較	增減 幅度(%)	市佔率(%)
1	GOMAJI 夠麻吉	340971	341	437	11637	454431	319	475	14500	2863	24.6	39.02
2	Groupon 台灣	407585	357	376	14562	312577	450	301	14056	-506	-3.5	37.82
3	17P 好康 (17Life)	162583	320	289	5203	191883	315	337	6049	846	16.3	16.28
4	集購城	12785	395	92	505	17690	528	115	934	429	85	2.51
5	123 團購網	17368	488	72	848	19132	459	97	878	30	3.5	2.36
6	拉手網	14343	362	111	444	8631	362	38	262	-182	-41	0.71
7	Yahoo! 奇摩折扣+	13457	258	114	481	7263	258	65	257	-224	-46.6	0.69
8	17Shopping	5489	417	122	229	4822	380	127	183	-46	-20.1	0.49
9	yam 撒便宜	2222	554	46	123	895	492	23	44	-79	-64.2	0.12
	總計	976803	348		34032		3563		37163	3131	9.2	

Fig. 4.4

GOMAJI site or alike primary sell discount tickets or services to consumers wanting to use volume to negotiate a better deal and we did a comparison of sites when consumers wanting to pick what products or services they prefer, commodities and ticketing. We see that in Fig 4.5, only two travel ticketing sites, ezTravel and ezfly are on the regular browsed online shopping sites. However on the ticketing/services category, ezTravel is only the fourth runner up at 15.3% and ezfly is only ranked #10 at 7.4% but the really surprising fact is that the first two ticketing systems are not travel related but event related like musical concerts, theatrical plays, sport events, and dance events. Only the 3rd and 4th place are GOMAJI and Groupon sites.

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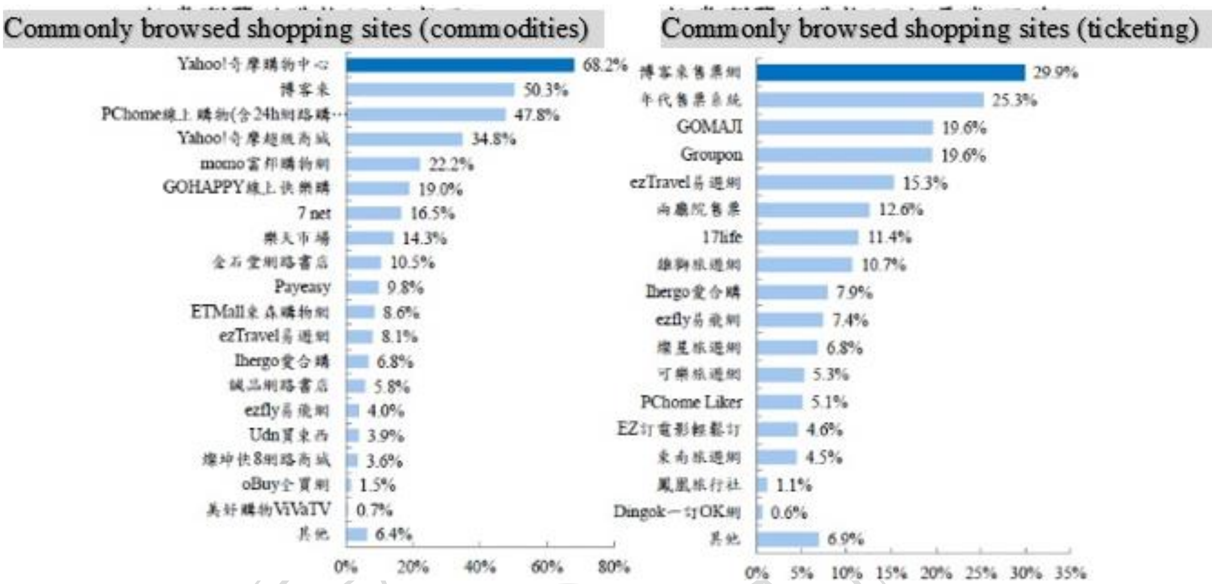

Fig. 4.5

We can see the trend that online shopping for traveling is becoming a norm and growing rapidly (51.1% combined for all online traveling sites + 20% discount tickets from Group Buy) for Taiwan market but shopping for event tickets still have the high grounds now (67.8% combined) and Group Buy sites have huge potentials (63.6% combined).

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5. Mobile Device and Online Purchases

The idea of buying whenever and wherever is a dream for all vendors and what better to realize that dream with the web-ready mobile devices that just about everyone has, smartphones. Today in Taiwan there are nearly over 50% mobile phone users own smartphones and continue to grow at a steady rate. These consumers are just one click away from purchasing online products from their smartphones and have it shipped to door within 24 hours or even less. In Fig. 5.1, we see that there are already some users using their smartphones to place orders and why or why not they decided to use a mobile device to place the order. Here in Fig. 5.1, we have 33% of users who have used a smartphone to place an order and if we look at the "Future Intention of Using a Smartphone to Place and Order" on the right, we have more interested than non-interested 28% vs 26% so we can see that consumer intended to order using a smartphone in the future is very likely to happen.

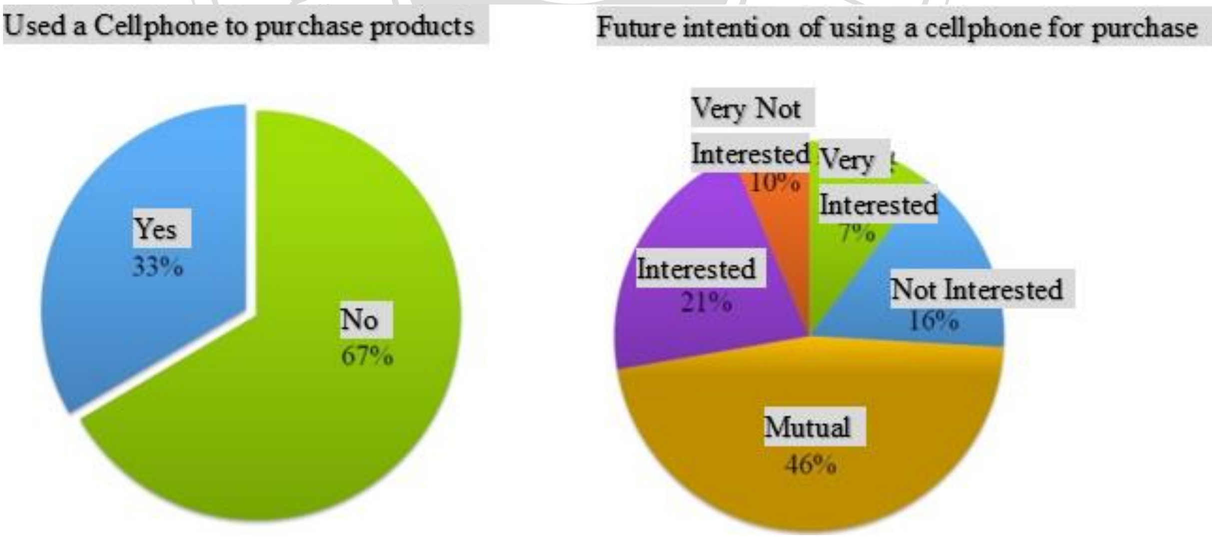

Fig. 5.1

In Fig. 5.2, we find out what the consumers would like to purchase via smartphone online ordering, and a vast majority of them are ticket related. With a 39.1% of purchases wanting to buy event tickets and 36.9% of purchases wanting to buy traveling tickets or related products, this shows that online ticketing is something worth to look into for online vendors.

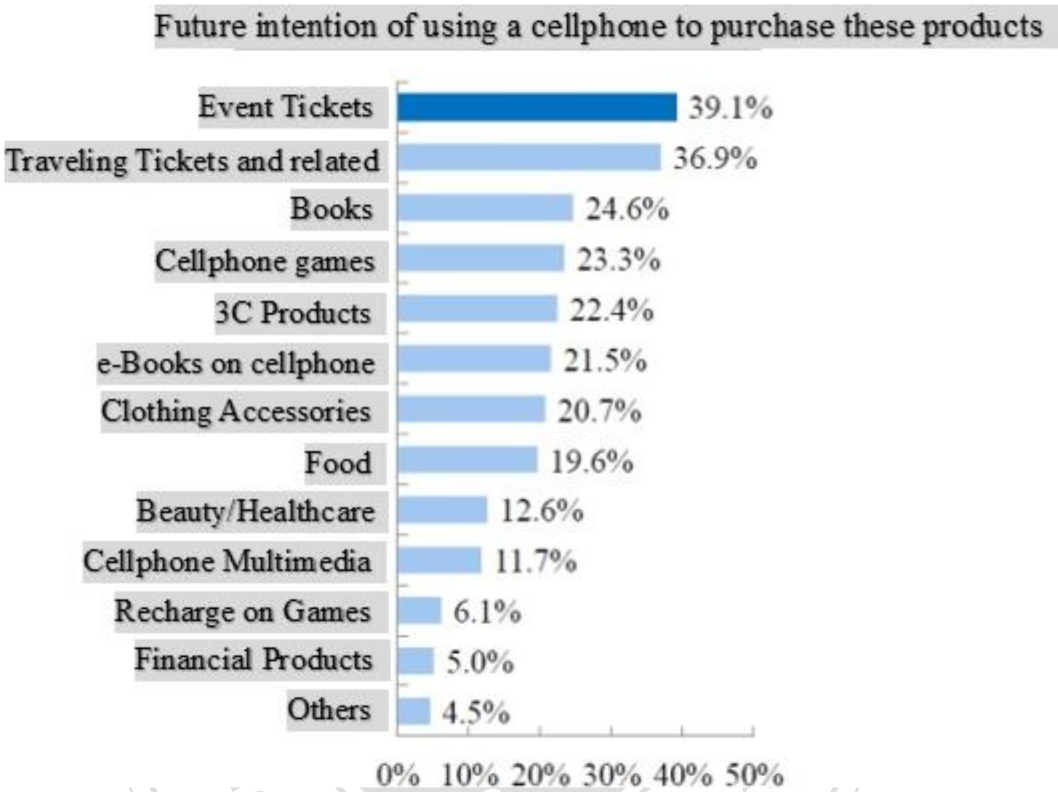

Fig. 5.2

As we question our interviewees what needs to be improved for mobile online shopping experience, we see great percentages of replies towards network speed, Fig. 5.3 shows 17.7% of users wanting better network speed and 13.9% of users wants better network quality, while only 11.5% of users have concerns about transaction safety. As Taiwan will start a new round of LTE licensing bidding in 2013, I believe the mobile network speed will soon to be address once LTE network is implemented in Taiwan. For mobile purchase transaction safety that will soon be addressed by Financial Supervisory Commission of Taiwan as in January 15th 2013 lifted the limit on mobile online credit card purchase from 3,000NTD and start accepting applications from financial services for related product and services. [5]

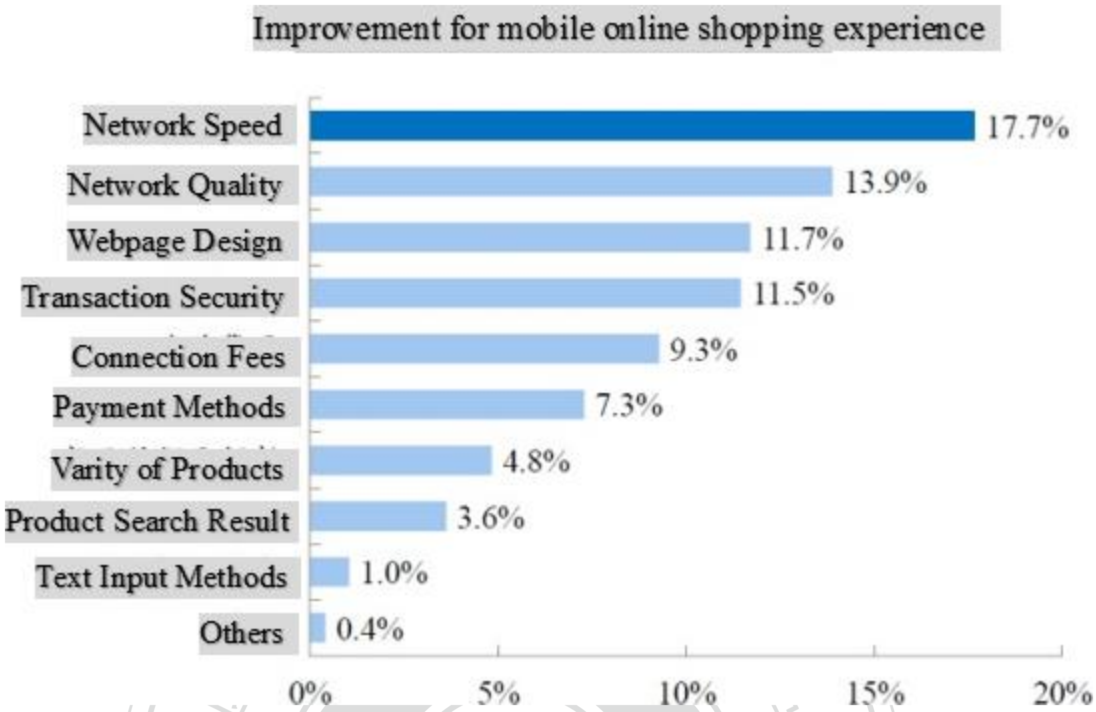

Fig. 5.3

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6. Logistic and Regulation

With Taiwan's regulation and protection of online consumers, online shoppers in Taiwan should consider themselves the lucky shoppers. A 7 days no questions asked return policy is enforced on products made via online purchases in Taiwan and this regulation even went head to head clash with Google. Taiwan's consumer protection laws demanded paid apps include a seven day trial period, but the Google Play refund period lasts only 15 minutes, thus regulation is working against Google Play rules but after 18 months of appeals and lawsuits, Google has won its right to handle returns and trial as it saw fit. [6] This regulation is crucial as it affects logistic within the purchase cycle and how the cash flow affects consumers. Of the top 5 online shoppers we mentioned in this paper, PcHome Shopping, Yahoo Shopping, MoMo, Books.com.tw, and Yahoo Marketplace all have the options to do complete Return Merchandize Authorization with just one or two clicks of buttons without any extra request from consumers. The ease of RMA is embedded within the purchase system so consumers can regret at any time without any fuss with internal or external online payment systems. Consumers can also select options to finalize the purchase at the convenience store POS when the package arrived for pickup, thus minimizing the risk of credit card information leak online. With a convenience store to store delivery network implemented by some local logistic companies, consumers can option to have packages delivered less than 9 hours with certain product categories. The expectations of consumers for speedy services and ease of shopping experiences are more demanding than ever on this island and for new comers like Amazon.com, establishing a good partnership with local brands are essential. Having a local partnership with local logistic provider or other online vendors would greatly boost the brand image and public relationship with consumers. The consumers would notice the immediate effect of logistic advantages and view Amazon.com as a company willing to provide world class services at localized market which is the center of Amazon.com core value, customers first.

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7. Amazon Web Services Potential in Taiwan

One of the services Amazon.com provides is Amazon Web Services, AWS for short, is a cloud services that provide elastic computing, storage, networking, and infrastructure services towards individual and corporates accounts. Currently this service is not localized in Taiwan but already some 500+ users have already signed up and using its services co-located worldwide. Due to language barriers and payment issues, the service is picking up slowly here in Taiwan compare with other local cloud service providers. The local companies have hard time reporting expenses on foreign receipts send to Amazon.com accounts and most of the support services are in English-only thus limiting local companies exploring great potential with AWS services as it was designed to elastically provide cutting edge technology at minimal price. However we do start seeing quite a few incubator center, sponsored by city governments to start introducing cloud technologies as basic seminars. I believe that AWS will eventually catch up and start leading the wave in Taiwan once the bill payment and language interface has been localized.

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8. Amazon.com's Market Position in Taiwan

Even though there's no localized Amazon.com web portal site in Taiwan, online shoppers can still make purchases with Amazon USA, Amazon Japan or even Amazon China sites here in Taiwan. Of the 7,685 valid samples we have, there are 2,938 valid samples that have made purchases towards oversea sites located outside of Taiwan, that's 38.23% of users willing to take the extra step to get the products they wanted, in Fig. 8.1.

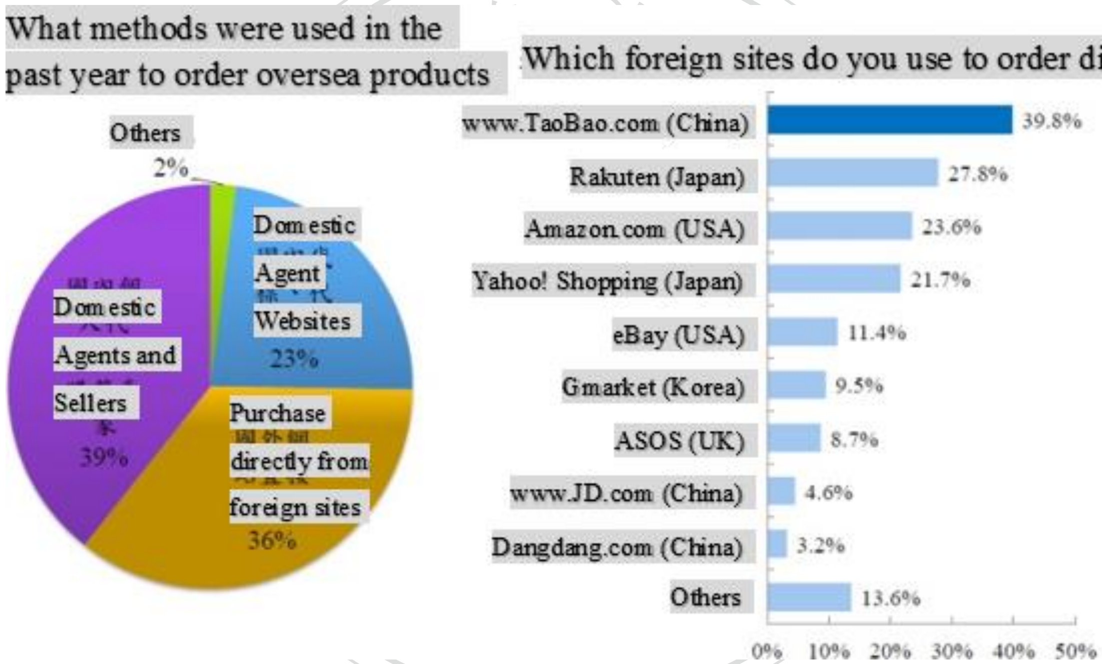

Fig. 8.1

What really surprises us is that only 36% of 2,938 shoppers chose to shop direct and a great deal of other users use personal agents (39%) or dedicated sites (23%) that specialized in oversea shopping sites. Even though there are a huge 39.8% of oversea shoppers buying on Taobao.com, it would be because of language similarity that Taiwanese users when searching for items, but for brand image and quality merchandise, shoppers would still pick Japanese or USA sites, like Rakuten (27.8%) and Amazon.com (23.6%).

9. Amazon.com Porter Five Forces

We then look at Porter Five Forces Model using Fig. 9.1.

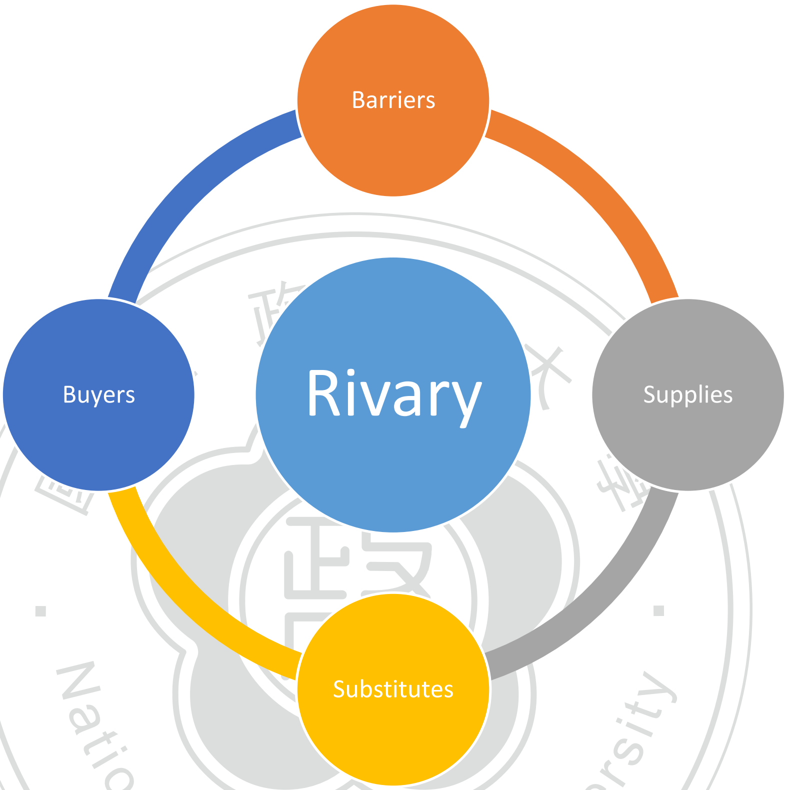

Fig. 9.1

Threat of substitute products and services – High, there are quite a lot of alternatives to Amazon’s services and products. Overall, there appear to be many substitutes to Amazon’s product offerings, Although Amazon’s products can be substituted fairly easy, the physical stores and web sites themselves may not offer the same quality of customer service and convenience to its customers as Amazon.com has done. [7]

Threat of the entry of new competitors – Low, not possible for a new company to have the depth and massive selection of what Amazon.com provides now.

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Intensity of competitive – High, Amazon.com has countless competitors here in Taiwan, especially the full grown ones like Yahoo Shopping and PcHome Shopping and smaller ones like NewEgg.com and MoMo Shopping. Although competition should not seriously threaten Amazon.com's future level of growth and success, if Amazon.com still decide not to enter the market here in Taiwan, it may well be too late to do so.

Bargaining power of customers/buyers – High, Amazon.com's customers have the option of buying the products and services they desire on the hundreds of thousands of other retail web sites on the internet.

Bargaining power of Suppliers – Medium-High, suppliers have a medium power in the sense that much of Amazon's own inventory could be obtained from numerous suppliers across the country or even across the globe.

10. Summary and Recommendation

With the porter five forces analysis done towards the Taiwan market; we see that the mobile shopping environment is getting more mature in technology and hardware and more acceptances in online consumers as well as online oversea shopping with personal agents. The Taiwan market is ready in terms of regulation, hardware, technology, and purchase intent and need from consumers. The opportunity window is opening wide now but it will close really soon as local players will start another round of investment on mobile purchasing. Amazon.com should act now and secure its position with heavy investment locally to create the dominate image and/or help from local brands in logistic and payment gateways, and other option include partnership with other local players. Although there was a bitter partnership with PcHome in 1999 [8] but there are other local major players in the market interested like momosho.com.tw. Although Kindle tablet is still not available for delivery directly to Taiwan market [9] from Amazon USA, many users have already purchase the tablets from Amazon Japan and as of now, Amazon AppStore includes Taiwan as servicing region. Also accounts from Amazon China[1] can now purchase Kindle books (English and Simplified Chinese) which means Taiwan users can register Amazon.cn accounts and purchase Simplified Chinese books. Another marketing strategy is to start a big co-branding promotion using localized payment systems, providing rebate or discount to users by using online payment system and offer unbeatable customer service like Amazon always do, Amazon.com can soon take the lead here as the #1 in Taiwan's Online Retailer.

1 Due to regulation, Amazon China accounts are separate from other Amazon Region Stores like USA, Japan, UK, Brazil, and Germany.

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