

# 达曼互动 零售消息月刊

## 亚马逊恐惧症：

亚马逊何以让传统零售商心惊胆战



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## 亚马逊何以让传统零售商心惊胆战

来自 Retail News Insider



亚马逊这个名字让绝大多数的实体零售商心惊胆战。网络零售商亚马逊在全球拥有 2.37 亿活动的客户账户，年营业额超过 740 亿美元，年平均增长率高达 22%，在网络和传统市场都占有一席之地。亚马逊诞生于创始人 Jeff Bezos 的车库，最开始仅仅是一家网上书店，后来逐渐成长为北美地区最大的网络零售商，销售范围从书籍、音乐、电影到化妆品、婴儿尿布、食品杂货，一应俱全。在过去的二十年间，亚马逊慢慢地削弱了实体零售商所自诩的种种优势，而且完全没有放缓速度的迹象。

亚马逊作为网上零售业巨头，持续不断地开发新服务和提供新优惠，从而挖走了实体店的消费者。亚马逊在 1999 年取得了“一键式结账”专利，在 2003 年开始

进军保健和个人护理市场，在 2006 年推出亚马逊生鲜产品服务，并在 2011 年推出即时视频服务。最近又引入了亚马逊 Echo™ 扬声器/私人助理。扩充了 Fire™ 平板



### 现实状况

没有网上形象的结合，也是很难立足的。稳健的网上形象结合多个实体店铺，可以助传统零售商一臂之力。

电脑、手机和媒体播放器产品，这些都是为了加强消费者和亚马逊之间的关系，更紧密和牢固地吸引消费者。亚马逊是否会成为实体零售

商和消费品供应商的致命一击？Retail News Insider 已开始着手研究。

首先让我们来看看最近让传统零售商不寒而栗的武器：Fire 和 Echo。Fire 平板电脑和手机配备了亚马逊专有开发的软件。利用该软件，用户可以快速便捷地比较多家商店中的产品价格，而且只要按一下按钮，或者仅仅拍张产品照片就可以轻松订购产品。用户使用 Fire 媒体播放器，只需要说一句指令，就可以访问和浏览亚马逊的流媒体电视、电影和游戏。

## 现实状况

如果你无法打败对手，那么加入他们。消费品供应商可以通过与亚马逊联合以及借用其技术能力来获益。



亚马逊最新的创新产品 Echo 是一款互动扬声器，即可以作为播放流媒体音乐的设备，也可以作为一位私人助理。它的“大脑”与云端信息库连接，用户无需输入任何文字，便可以透过语音提问，像是“今天的天气如何”之类的问题，向购物清单中添加产品，甚至可以通过亚马逊直接订购产品。（您可以访问 <https://www.youtube.com/watch?v=Kk0CeAtKHlc> 了解 Echo 如何运作。）

无论消费者在房间的什么位置，Echo 始终保持开启状态并侦听自己的名字（确切的说是“Alexa”）。消费者同 Alexa 的交流越多，她越能了解消费者的喜好倾向。虽然推广文案中没有说明，但 Echo 实质上相当于在顾客的家中安排了一位亚马逊销售代表，全天候接受命令。

可以确定的是，亚马逊正努力成为消费者的一站式购物解决方案。然而，尽管零售商和消费品供应商面临危机，一切仍为时未晚。“亚马逊和传统零售商都有自己生存的空间，”达曼互动高级副总裁 Jeff Engel 表示，“亚马逊其实只能为消费者提供有限的购物体验，

他们上网、选购产品，然后送货到家。而实体零售商可以通过店内互动式的亲身购物体验，为消费者提供更多一对一的现场真人交流互动。”

Engel 的观点是有道理的，可以在市场中找到一些证据来支持他的观点。在亚马逊不断侵蚀市场的情况下，仍有众多优质传统零售商仍然可以获得收益并保持客流量。总的说来，他们所提供的就是消费者无法通过网上购物所得到的，即产品、一定程度的服务或体验。

例如在 2014 年 12 月，玛莎百货在全国七个城市推出了当日送达服务，顾客可以在零售商网上商店里订购任意商品，当地的玛莎百货会在当天将所购商品送达至顾客。虽然亚马逊也提供当日送达服务，但仅限于亚马逊仓库所在的少数地区。玛莎百货的这项服务能够得到迅速的推广，得益于其已经形成的实体店规模和已经建立起来的分销渠道，即全国超过 700 家的实体店铺。

对于食品杂货方面来说，强化在农产品、肉类和乳制品的投资是关键。虽然亚马逊的生鲜项目也提供这类商品，但这仅限于西雅图、旧金山、圣地亚哥和纽约地区，并且还要求顾客在最初支付 299 美元的会员费。对于这个巨大的商机，



## 现实状况

考虑差异化，而不是直接竞争。例如，传统食品超市可以借助自己在食品新鲜度和本地市场的优势招揽顾客。

传统的超市零售商只需在合适的地理位置，以合理的价格提供和推广新鲜、高质量的鲜活产品，就很容易获得客户的信任和光顾。

从提供生鲜食品的角度来说，推广的手段和差异化的表现，必须要透过一套有效和消费者互动的平台结合，才能真正发挥出作用的。关于这点，Engel 指出，“你必须与消费者在多方面进行交流。你需要确定自己的目标客群，并明确与他们的最佳互动途径。然后围绕这些内容制定策略，并根据分析研究，不断评估和调整解决。”

传统零售商还有一个可以吸引亚马逊潜在顾客的途径，就是在拥有实体店铺的同时，也能建立能强化自身优势的网路形象。零售商可以针对消费者在便捷方面的要求，提供多种取货和/或送货以及退货的方案供其选择。

就是这方面的佼佼者，它在刚过去的“网购星期一”活动中刷新了网上销售纪录，“网购星期一”是传统的网购日，能让像亚马逊这样的网络零售商获益。和亚马逊不同的是，沃尔玛为消费者提供了到店试用体验产品的机会，之后消费者可以决定在店里购买或是从网上购买。网上顾客还可以选择将商品送到家里或是当地的实体店铺。另外，沃尔玛还会采用其他零售商的网上促销价格，让顾客可以以他们想要的价格，随时获得满意的商品。

对于传统消费品供应商来说，要想在亚马逊的网络环境中获得成功并不能单靠相互竞争的想法，而是应该通

过合作来形成优势。有些消费品供应商抱怨从亚马逊获得的利润太少，但他们不应该忽视亚马逊平台所包含的潜在优势。有一个最大的潜在优势，尤其对于较新和较小的品牌来说，那就是可以大量增加曝光度。即使是很少网购的顾客，在开始网购商品时，通常也是先从亚马逊这样的网络零售商开始。

与亚马逊形成更有效的关系，也有助于消费品供应商更好地控制零售商对其产品的销售方式。目前来说，除非消费品供应商与亚马逊达成具体协议，否则任意第三方卖家都可以在网上销售他们的产品。现在有几家品牌商已与亚马逊达成直接合作协议，如 Levi Strauss 和 Burberry，他们在亚马逊独家销售自己品牌的产品，屏蔽第三方转售商，以保护他们的利益。

总而言之，亚马逊已经毫无疑问成为一支不可忽视的力量。但它的创新并非是对传统零售业的损害。就像亚马逊打破了传统零售模式一样，传统零售商和消费品供应商也必须打破现状，才能走上成功之路。

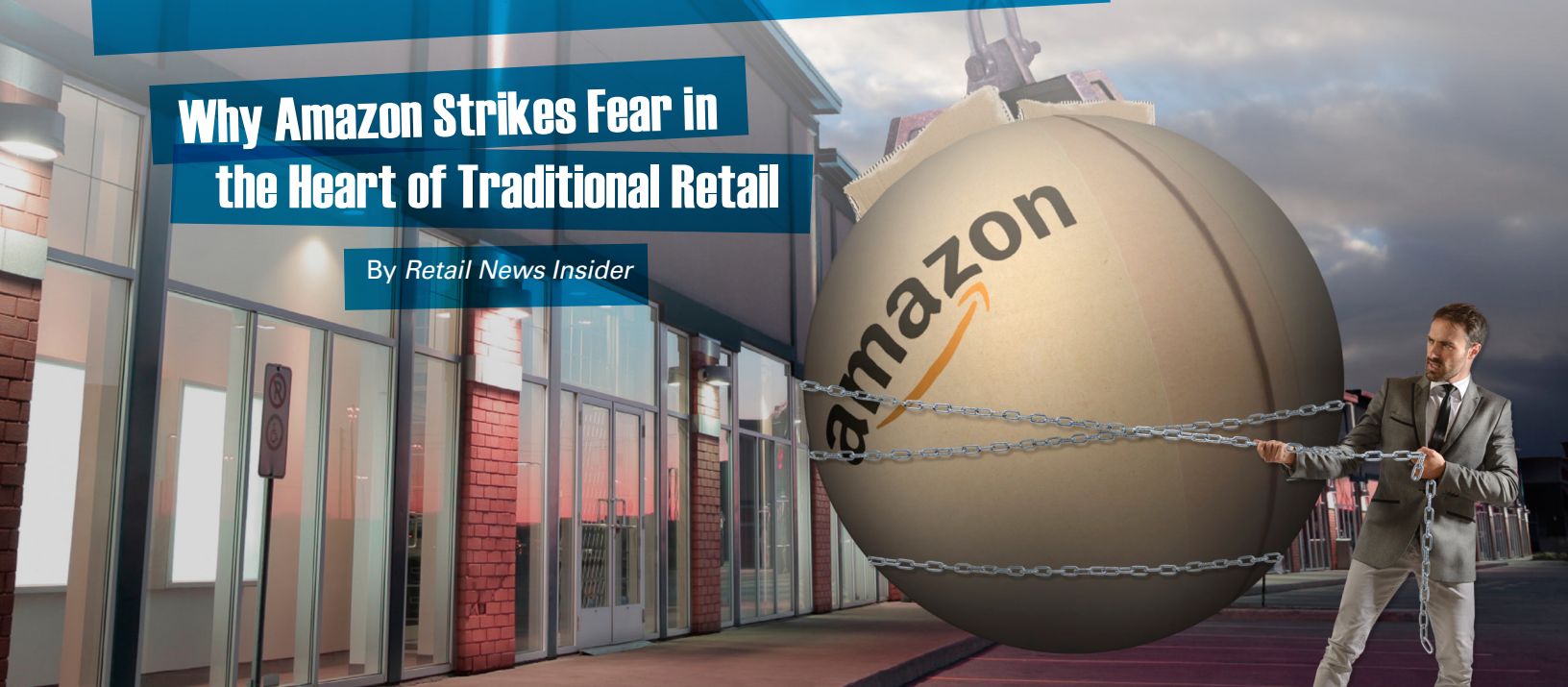
## 陈宏毅 | 副总裁 | 达曼互动

Danny Chen | Vice President International | Daymon Interactions  
hchen@daymon.com  
US Mobile: +1.203.918.5149 | China Mobile: +86.150.1381.4321

# AMAZON—APHOBIA

## Why Amazon Strikes Fear in the Heart of Traditional Retail

By Retail News Insider



**Amazon**— it's a name that strikes fear in the hearts of most brick-and-mortar retailers. With 237 million active customer accounts worldwide, over \$74 billion in annual revenue and an average growth rate of 22 percent, the e-tailer is a force in both the online and traditional marketplaces. From its humble beginnings as an online bookstore based out of founder Jeff Bezos' garage, Amazon has risen to become the largest online retailer in North America, selling everything from books, music and movies to cosmetics, diapers and groceries. Over the past two decades, Amazon has slowly chipped away at nearly every advantage brick-and-mortars once staked a claim to—and it shows no signs of slowing down.

The online leader is continually innovating new services and benefits to steal brick-and-mortar shoppers away, patenting one-click shopping in 1999, expanding into the health and personal care markets in 2003, adding Amazon Fresh grocery services in 2006 and instant video

in 2011. Its latest introductions, including the Amazon Echo™ speaker/personal assistant and expanding line of Fire™ tablets, phones and media players, are designed to make the bond between consumers and Amazon tighter than ever before. Could they be the final deathblow to brick-and-mortar retailers and the CPGs who serve them? *Retail News Insider* set out to investigate.

First, a look at the latest tools sending shivers down traditional retailers' backs: Fire and Echo. Fire tablets and phones are equipped with Amazon's proprietary software that allows users to quickly and easily compare prices on items across different stores and order items through the retailer simply by pressing a button or even taking a photo of a product. And Fire media players allow users to access and browse Amazon's streaming TV, movie and game offerings just by saying a command.

Amazon's most recent innovation, Echo, is an interactive speaker that acts as both a device to stream music through and a personal assistant. Its "brain" is connected to the cloud, allowing users to ask it



### Reality Check

If you're not online, you don't exist. A robust online presence combined with the benefits of multiple brick-and-mortar locations can give traditional retailers a leg up.

questions like "What's the weather going to be like today," add items to their shopping list, and yes—even order directly through Amazon—all without having to type a single word. (You can check out Echo in action at <https://www.youtube.com/watch?v=KkOCeAtKHlc>)

## Reality Check

If you can't beat 'em, consider joining 'em. CPGs can benefit from joining forces with Amazon and capitalizing on its technological savvy.

Echo is always on and listening for its name ("Alexa," to be precise), no matter where a consumer is in his or her home. The more the consumer talks to her, the more Alexa learns his or her preferences. Though it's not promoted as such, Echo essentially moves an Amazon sales rep right into shoppers' homes, ready to take their orders 24 hours a day, 7 days a week.

To be sure, Amazon is trying to become consumers' one-stop shopping solution. But despite retailers' and CPGs' fears, all is not lost. "There is room for both Amazon and traditional retailers," says Jeff Engel, Senior Vice President of Retail for Interactions. "Amazon gives consumers a limited experience. They go online, they pick out an item and it gets delivered to their door. Brick-and-mortar retailers can offer so much more through the in-store experience and one-on-one human interaction."

There's plenty of evidence in the marketplace to support Engel's assertion. Numerous traditional retailers are still seeing gains in sales and foot traffic despite Amazon's encroachment. The way they're doing it, by and large, is by giving consumers something they can't get from the online retailer—whether it's a product, a level of service or an experience.

For example, in December 2014, Macy's introduced same-day delivery service in seven cities across the country, allowing shoppers to order any of the items the retailer offers online and have them delivered from a local Macy's store to their home later that day. While Amazon also offers same-day service, it is limited to the few areas where Amazon warehouses already exist. Macy's program has much better potential for widespread growth, with the retailer already having a brick-and-mortar presence—and therefore an established distribution channel—in over 700 stores across the country.

For the grocery market, capitalizing on produce, meats and dairy products is key. While Amazon does offer these items through its Fresh program, it's limited to the Seattle, San Francisco, San Diego and New York areas. And it requires shoppers to outlay an initial \$299 just for a membership fee. There's huge opportunity, then, for traditional grocery retailers to capture shoppers' loyalty by providing and promoting fresh, high-quality perishables in a convenient location at a fair price.

Promotion and differentiation as a fresh provider must also be tied in with an effective strategy for engagement. To this point, Engel notes, "You have to engage with consumers on multiple levels. You have to define your target audience and determine the unique ways they're going to connect best. Then you can build a strategy around that, constantly assessing and adjusting your plan based on the insights you gain from analytics."

Another way traditional retailers can successfully reel in would-be Amazon

shoppers is by creating their own robust online presence as a complement to their brick-and-mortar stores. Retailers can play on consumers' desire for convenience by offering multiple options for pickup and/or delivery, as well as returns.

A leader in this arena is Wal-Mart, which smashed its record for online sales this past Cyber Monday—a shopping day traditionally thought to favor e-tailers like Amazon. But unlike Amazon, Wal-Mart gives consumers the option to come into the store to try out products first, then decide whether to buy them here or order them online. Online shoppers also get to choose whether to have items shipped to their homes or a local brick-and-mortar store. In addition, Wal-Mart will match advertised online prices from other retailers, including Amazon—giving shoppers the convenience of getting what they want, at the price they want and when they want it.

For traditional CPGs, succeeding in an Amazon world may not be so much about trying to compete with them. Rather, there may be benefits to joining forces. Though some CPGs bemoan the slim profit margins Amazon offers, there are potential upsides to be gained through access to its platform. One of the biggest potential benefits, especially for newer and smaller brands, is the opportunity for immense lift in exposure. Even for shoppers who don't end up buying online, e-tailers like Amazon are often where they start their research.

Creating a collaborative relationship with Amazon can also give CPGs greater control over how their products are sold through the retailer. Currently, unless a CPG has a specific agreement with Amazon, any third-party seller can make their products available through the online retailer. But several brands that have agreed to work directly with Amazon, such as Levi Strauss and Burberry, have gained the exclusive right to sell their wares directly, blocking third-party resellers and protecting their bottom lines.

All in all, there's no doubt that Amazon is a force to be reckoned with. But its innovation doesn't have to be at the detriment of traditional retail. Just as Amazon has brought disruption to the traditional retail model, so too must traditional retailers and CPGs find ways to disrupt the status quo in order to pave the road to future success.



## Reality Check

Think differentiation, not direct competition. For example, traditional grocers can use their strengths in the fresh and local markets to win shoppers over.