

大灣區消費者對生活品牌及全渠道營銷的呼喚

early
makers

em
lyon
business
school

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香港 2020年12月23日

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make
your impact

GLOBAL DBA

DOCTORATE OF BUSINESS ADMINISTRATION

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THE HONG KONG
POLYTECHNIC UNIVERSITY
香港理工大學

关键问题

- 什么是品牌?
- 为什么設計和管理品牌體驗是成功關鍵
- 市场变化和趋势对品牌体验的影响: 聚焦中国
- 在大湾区建立和管理品牌应该注意什么
- **OEM**为什么很难建立和发展品牌

首先我們要注意 =>

市場營銷新實踐

- 共同創造價值
- 幸福感
- 全渠道
- 全面的顧客體驗
- 個人消費轉移往集體消費

要求企業改變管理思維，分析的視野及方法。
評估表現的指標、戰略及管理行為

为什么我们对品牌感兴趣？



品牌的作用

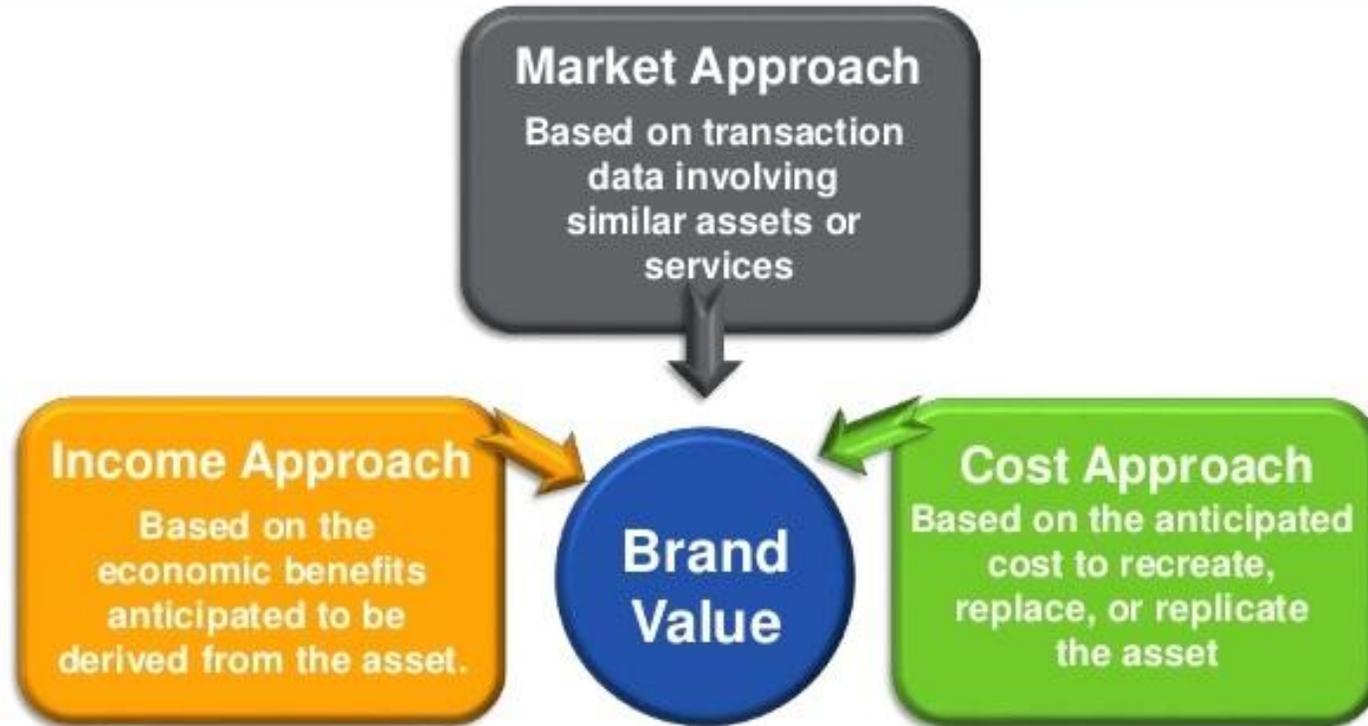
- 品牌產品或服務解決消費者個人的核心需求
- 社會認同 (Social Recognition/ Social Acceptance)
- 心理需求：個性 (Personality)

個人價值表達 (Self-Expressive)：我是誰 (Self)，生活風格 (Lifestyle)

社會日益富裕，百姓解決生活及生存需求後，心理及精神需求上升，加上科技社會價值觀及次文化和零售環境的變化，**對具質量生活方式的需求強烈，豐富及全面的品牌體驗為大勢所趨。**

品牌是公司的资产

Valuation Methodologies

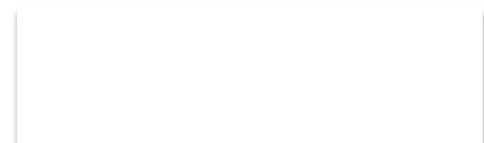


I. What is a Brand?

什么是品牌? Versus

什么不是品牌?

=>What is a brand to customers?



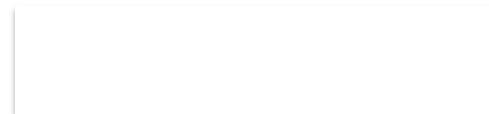
A. 传统定义：

品牌是名字，词语，标志，符号或设计，或以上元素的组合，使卖家能藉之界定其产品或服务，使与竞争对手的同类产品或服务相互区分。(AMA)

B. 抽象的定义：

▶ “品牌是扎根于顾客脑海中对某些东西的感知实体 (Perceptual Entity)，根源于现实，却反应某种感知，甚至反映顾客的独特性。” (Kevin Keller, 1998)

▶* 广告顾问公司遂把品牌定义为：「产品、服务或企业通过市场沟通活动发放资讯的总和。」(例如Mercer Management)



Brand Management – A Conventional Approach 传统的品牌战略管理

- A · Market Segmentation 市场细分
- B · Positioning 定位
- C · Marketing Mix 市场营销组合整合
- D · Corporate Culture 企业文化
- E · Evaluation 评估

+ Marketing Mix: Dove products

- antiperspirants/deodorants
- body washes
- beauty bars
- lotions and moisturizers
- hair care
- facial care products



+ Marketing Mix: Dove place



+ Critical Issues: Dove



- Dove's advertisements have been controversial among audience including issues of racism, nudity, and hypocrisy

如何创建品牌?

◆ Major activities 主要投资于那些活动/元素?

- Brand name 命名
- R&D 研发
 - Product 产品
 - Package 包装
- Advertising 广告
- PR 公关

Recently 近年:

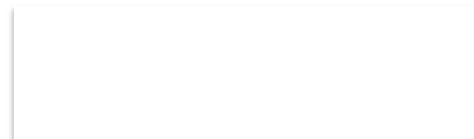
- People 人
- Corporate culture 企业文化
- Technology 科技
- Corporate responsibility 社会活动/公民责任



这是否足够?

- Channels 渠道
- Operation/service policies 政策
- Management mentality, management and operation systems, process 管理思维、制度、过程
- All other touch points 品牌接触点

➤ *Which level is adequate? 那一水平才算足够?*

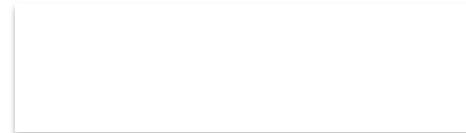


I. 什么是品牌？

品牌是⇒

- It is a collection of perceptions in the mind of the customer based on his/her learning, purchasing, consumption, and relationship experience with the brand. Based on such perceptions the customer is able to perceive the *values* delivered by the brand.

品牌是顧客根據對某品牌的整束包括學習品牌，購買品牌消費品牌和與品牌發展和建立關係後的不同範圍的總體體驗，並根據此種體驗感受到此品牌為真帶來的價值（包含利益和好處）



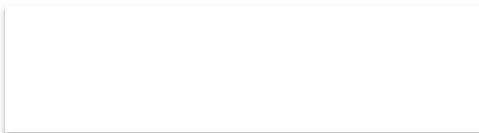
II. 什么是品牌品牌承诺价值？

Promised value

品牌承诺的**价值**

+ Associated Value

品牌联想的**价值**

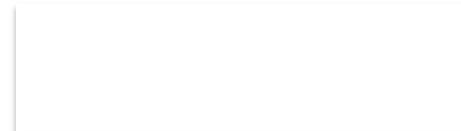
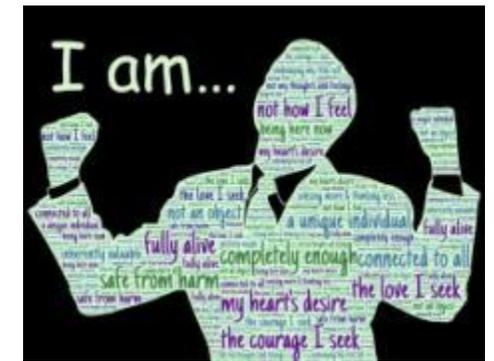


Value 价值

- ▶ Functional Value/Benefit
- ▶ Emotional/Psychological Value/Self-expressive Benefits
- ▶ Social Value

A strong brand deliver the following values to customers as promised 品牌讓顧客感受到:

- 功能價值 / 利益
- 情緒 / 心理價值 利益
- 社會價值



▶ The Secret of Successful Branding

▶ 品牌和创建管理要我们

▶ Design *設計* and Manage *管理* 品牌
體驗

設計和管理品牌體驗是成功關鍵

III. 品牌體驗和價值

Brand Experience and Perceived Values

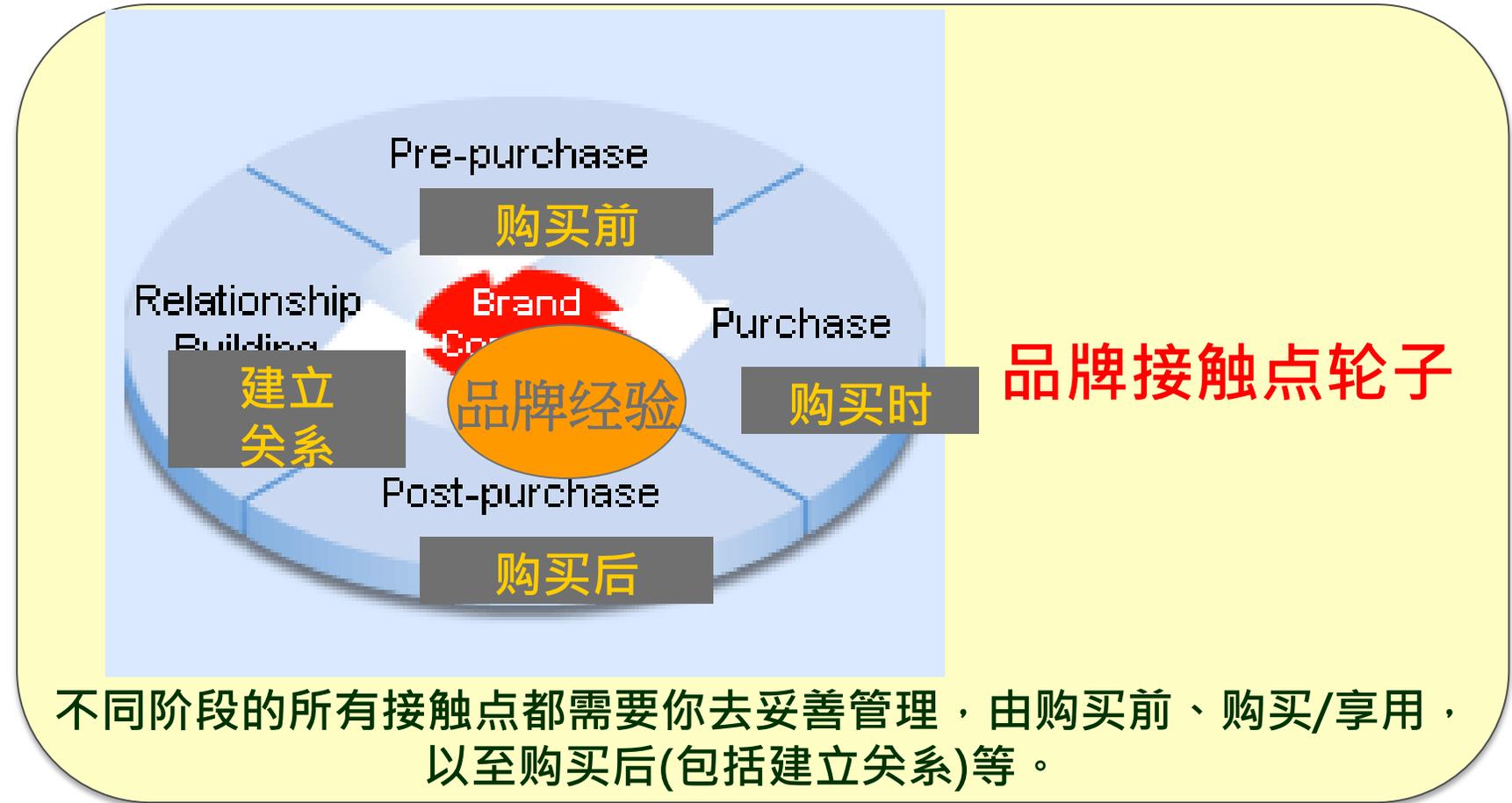
- Building and managing brands: The secret of success is to know how to design and manage brand experience 品牌和創建管理要我們設計and管理 品牌經驗
- Customers base on brand experience to perceive the value of the brand
- What is brand experience?

設計和管理品牌體驗是成功關鍵

甚么是品牌体验？

- 从5方面看品牌体验(Schmitt)

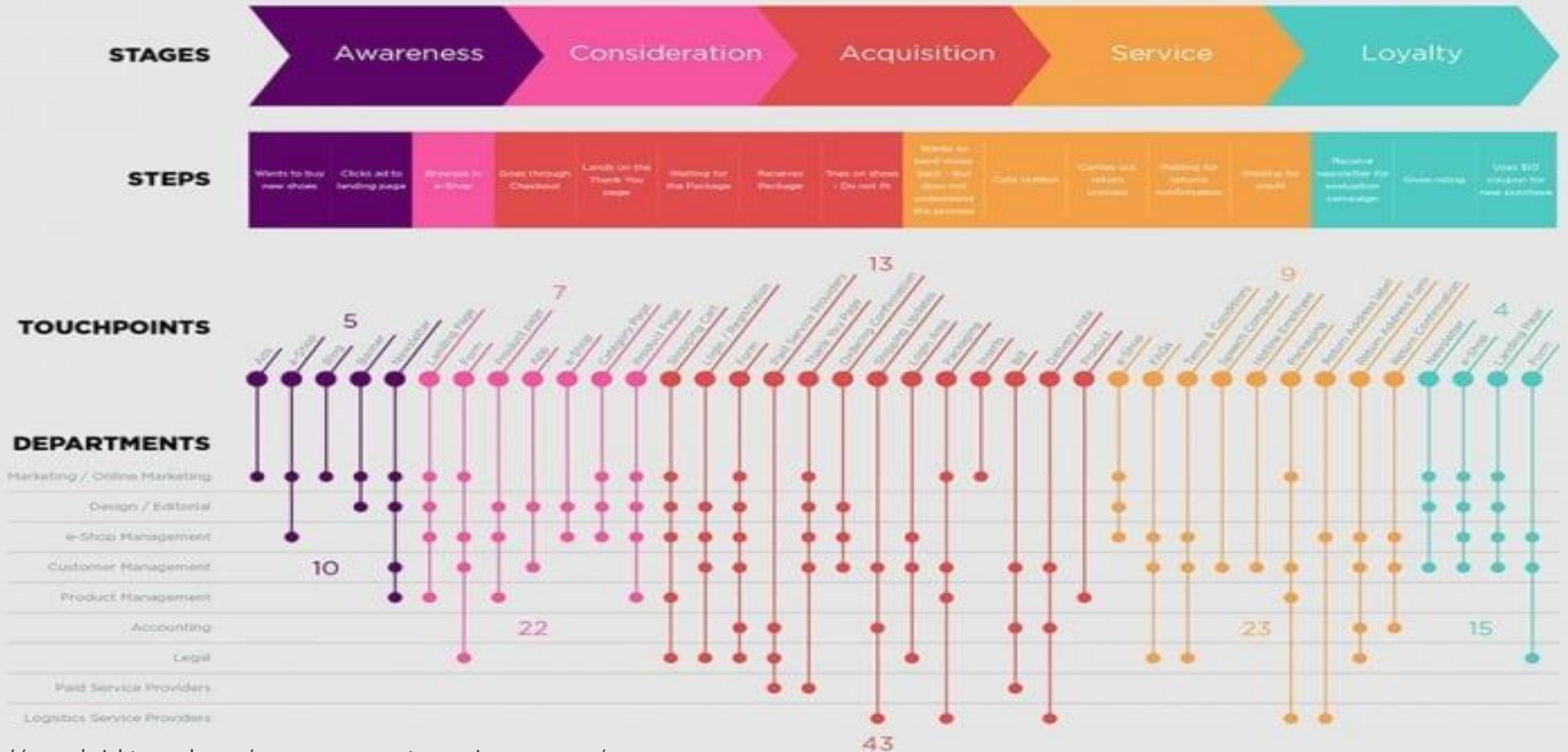
- 感觉
- 触觉
- 思想
- 行为
- 联系



界定关键接触点
=>利用客户体验旅程图

CUSTOMER JOURNEY LAYERS

BrightVessel.com



Phases	Awareness		Application	Disbursal		Customer Support			Loan Closure		
Actions	Visits branch, informed about rate of interest, loan amount & mandatory requirement of saving account	Online comparison with personal loan offerings of other banks Finds out about foreclosure &, part-payment facilities (non-chargeable) and longer tenure	Visits branch Submits required documents at the branch.	Disbursal time ranges from 3-10 days. Average 6-7 days	Rate of interest higher than that committed by the bank representative	SMS reminders for EMI payment, however no acknowledgement for EMI receipt.	TAT for loan statement via customer care is 2 days.	Part payment: Customer expects that EMI will be reduce. Informed only tenure is reduced, EMI reduction option not available.	Customer support unable to handle non-standard request (ECS mandate failure, EMI date change, EMI reduction on part payment, incorrect loan amounts)	Customer contacts all support channels in an effort for resolution Resolution typically delayed, often not satisfactory	Receives loan closure letter, Informed to collect post dated cheques
★ Touch points Touch point under stress	 		 	 	  			 	   	  	  
Thoughts	Supportive staff, get relevant information	it seems to be the better option	Very simple & quick process	Came to your bank on having faith of larger network services and getting loan on time..... But hopes are dashed out	Let's discuss this first, if this is a mistake. How can they commit something and approve something else? Now it's too late to look for another loan	How come they never send an update of EMI receipt?	Why does it take 2 days to send the loan statement? Anyway atleast they must send it without follow-ups.	Why don't they communicate properly in the first instance?	Couldn't they have validated this well before....due date? Hopefully they get it right this time.....	What kind of solution is this?..... This is not the solution...	Why can't they send it to the registered address? Anyways the letter says they will destroy it post 45 days. It's been a month since the loan was closed. Hopefully, they should have destroyed the cheques. They should atleast send some confirmation of the same. Why don't they communicate?
Emotions	Curious, Hopeful	Happy	Happy	Unhappy	Very Unhappy, Helpless	Satisfied, but hope for better clarity	Neutral	Upset, Unsatisfied, Apprehensive	Helpless, Dissatisfied, Worried, Angry	Confused, Dissatisfied	Anxious but satisfied



Opportunities :	Drive messaging on part-payment, Foreclosure, tenure	communicate product information (transparent). Website looks good but functionally tedious	communicate eligibility criteria (Clear, Fairly predictable, system driven)	communicate updates on approval time [Pro-active, system driven, outbound]	Provide assistance on eligibility criteria. Communicate Loan approval information. Get a customer acceptance responses	Drive messaging on the platform of Loan update, current outstanding	Communicate system driven updates on time, proactive outgoing SMS	Communicate ECS details and status. Drive messages on ECS Validity & EMI details	Provide first time resolution	Customer unaware of most effective channel for support. Equip, Empower processes, systems, people for "non-standard" situations	Communicate information on Post Dated Cheque destruction
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IV. 消费与市场趋势

Research World

2020年全球消费趋势



Top 10 Global Consumer Trends 2020



中国消费者显示相同的变化且更广更深入和全面

带动消费者零售在营运、战略、布局和选址，推顾客服务、市场信息的收集及利用上的重大变化



2018年以来，国内零售市场及消费者行为的重要变化

“硬”变化

社区商场
景点商场
社交电商
网红/主播·直播
到家零售
数字金融

“软”变化

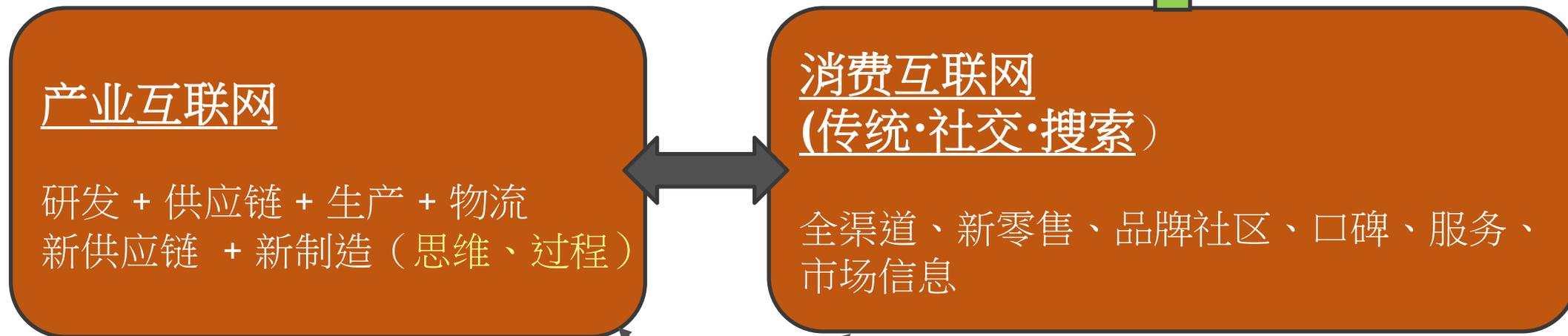
线上信息搜集行为
宅家购物
非接触配送
跨境采购
平台交易
外卖服务
远程定制
在线设计
个性化服务
炫耀性消费



中国零售市场大趋势

品牌承诺价值, 个性化, 幸福感

售卖生活

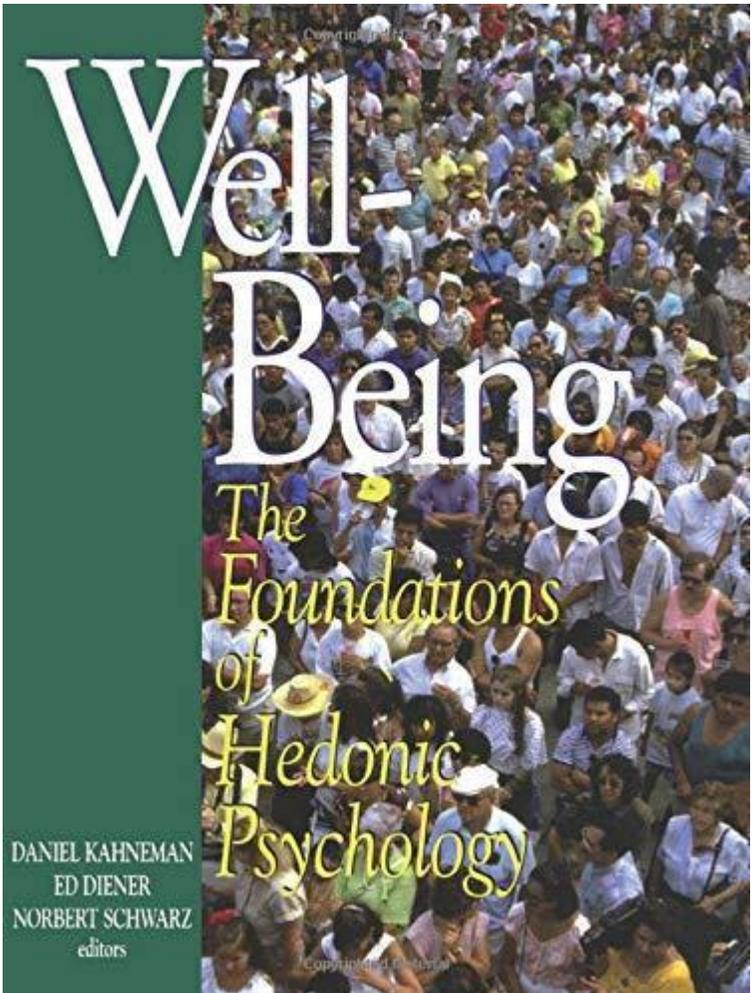


价值共创

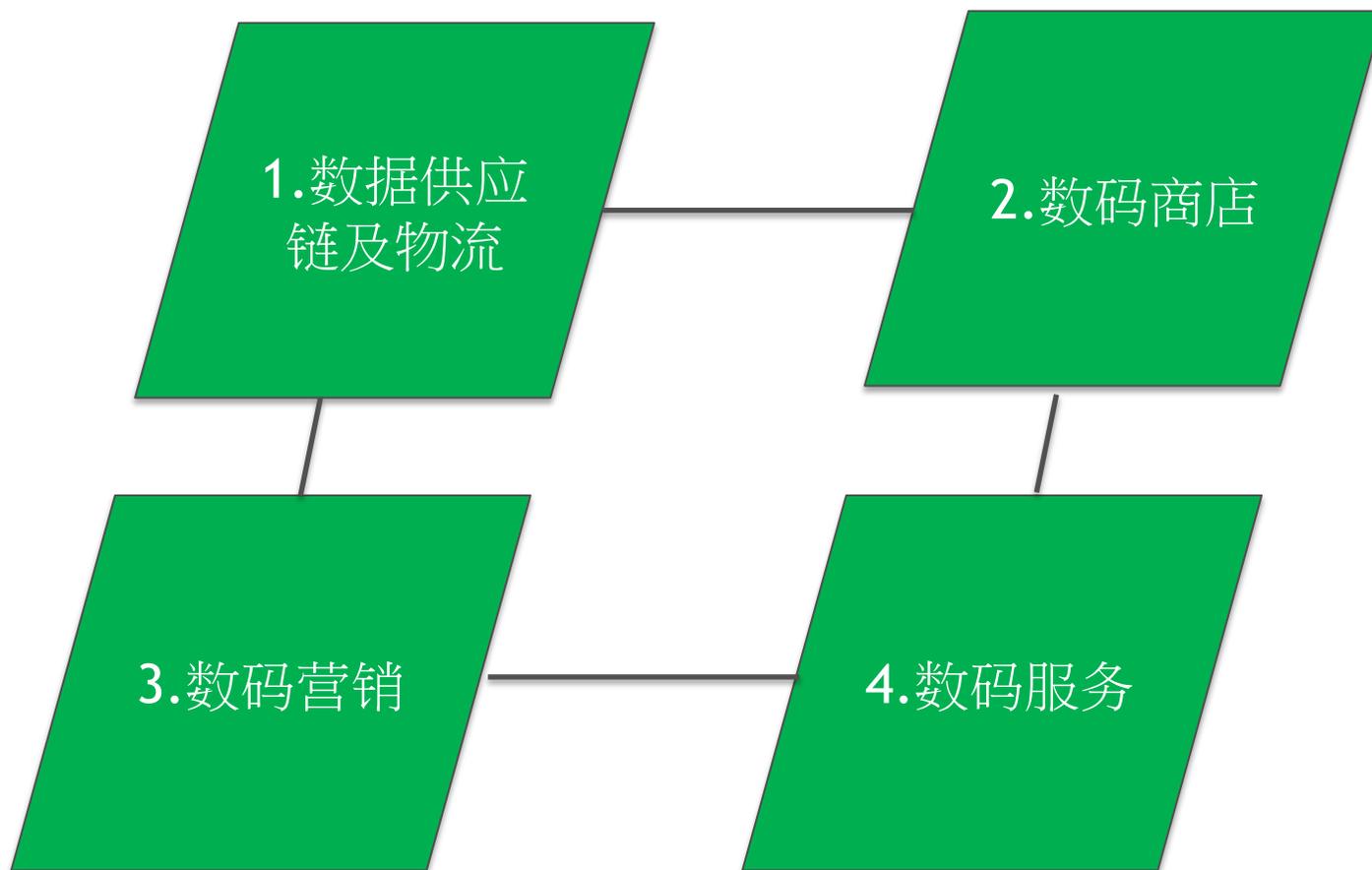
数据化 =====> 互联网化 =====> 智能化

我们不应该停留在售卖产品或服务的思维上，成功的品牌在售卖生活！

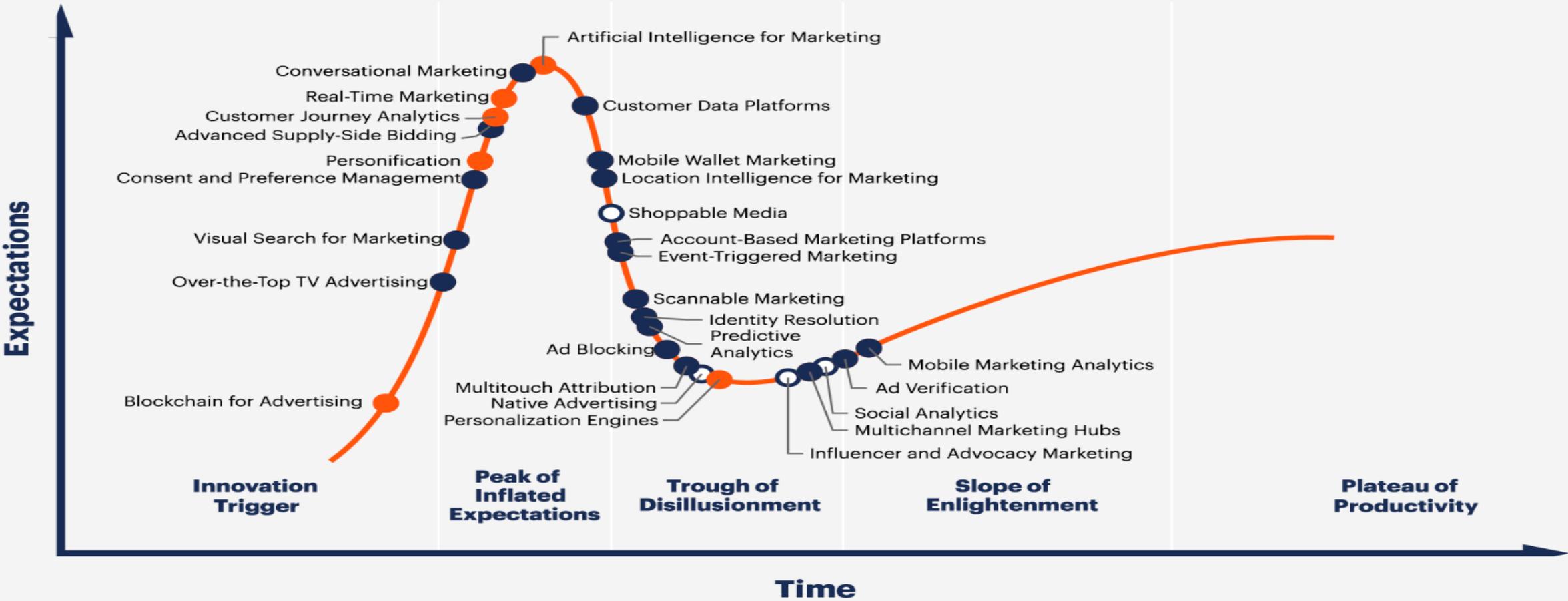




目前的新零售多聚集给①及②两范畴



Gartner Hype Cycle for Digital Marketing and Advertising, 2019



Plateau will be reached:

- less than 2 years
- 2 to 5 years
- 5 to 10 years

Source: Gartner
 © 2019 Gartner, Inc. and/or its affiliates. All rights reserved.







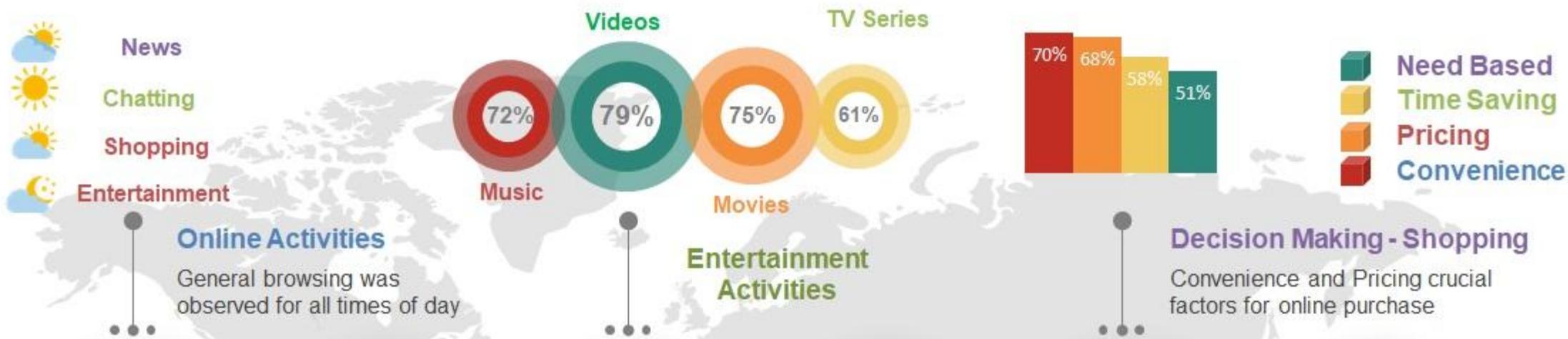
我们11月的调查结果

- 产品因素
- 主播
- 呈现的生活方式



Digital Marketing

数码营销/数字营销时代



Preferred Devices
Smartphone most preferred



Social Media Channels
91% preferred Facebook for networking



Financial Products
Percentage of income invested in financial products



BEHAVIOR INFOGRAPHIC

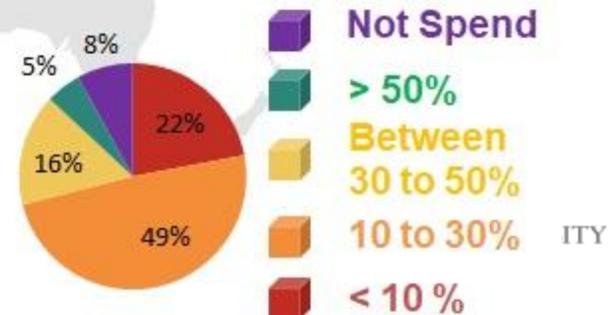
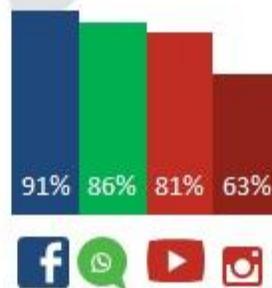
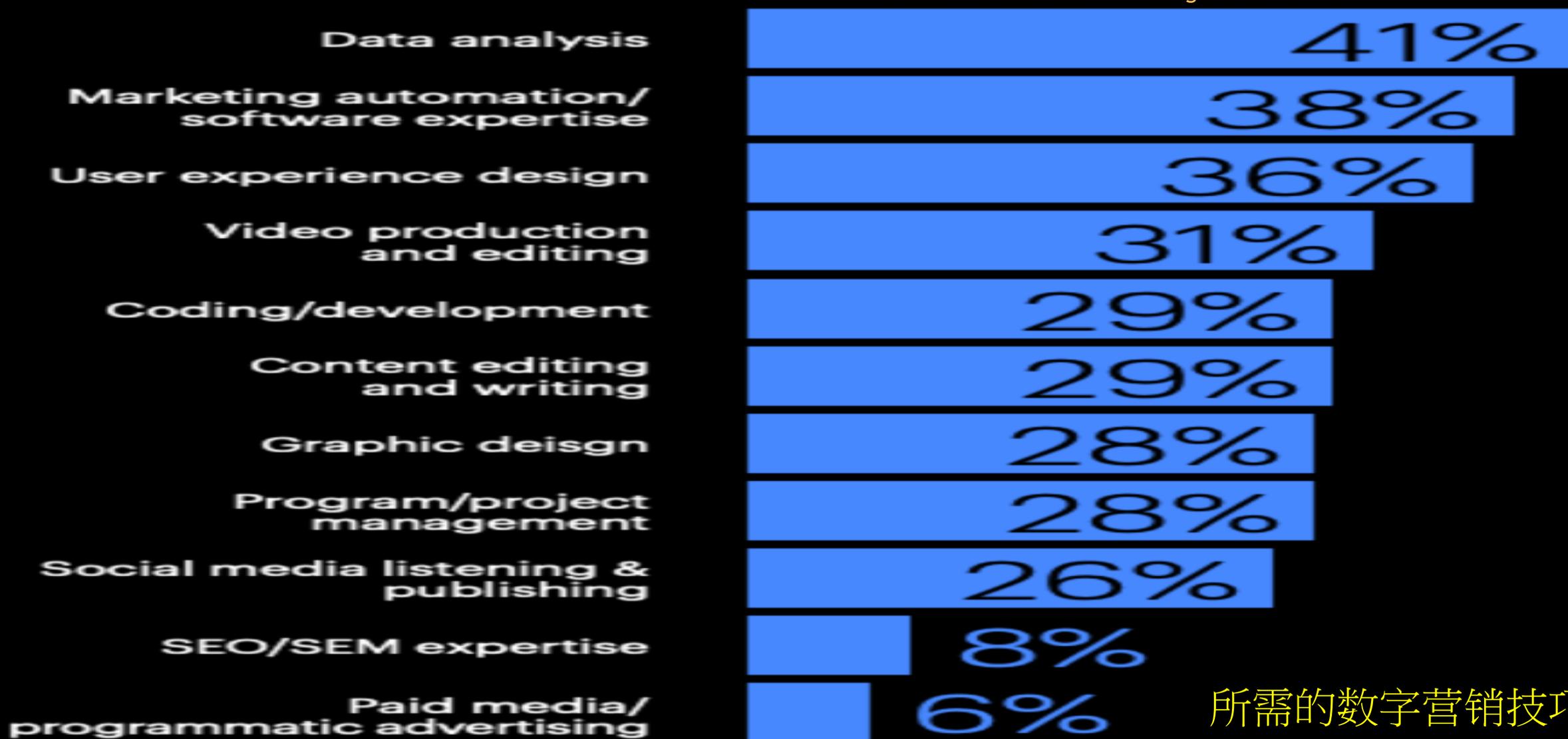


FIG 3: WHAT ARE THE MOST DESIRED SKILLS FOR YOUR DIGITAL MARKETING HIRES IN 2019-2020?

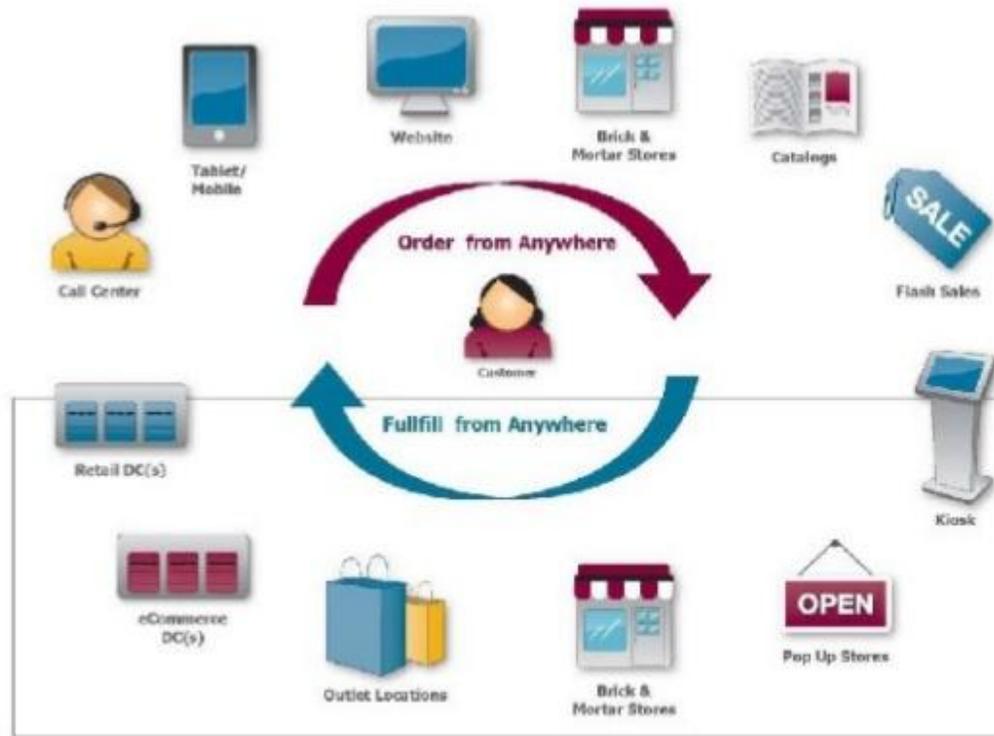
<https://www.smartinsights.com/managing-digital-marketing/marketing-innovation/6-essential-marketing-trends-for-2020/>



所需的数字营销技巧

全渠道的概念

Omni-Channel Experience



What is Omnichannel?

Multichannel

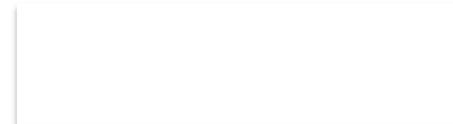


Omnichannel



Source: Multichannelmerchant.com

#SDAOM



疫情及中國消費者習慣的改變，呼喚有針對性的全
渠道戰略，豐富及提升品牌體驗

3大全渠道消費群體

- =》 利用整合的全渠道消費群
- =》 主要利用移動渠道的消費群
- =》 圍繞興趣而衍生的全渠道消費群

全渠道與品牌接觸點：

- 實物接觸點
- 數碼及社會媒介接觸點
- 人本接觸點

例如：如何整合線上線下信息搜尋及購物體驗？
全渠道下實體店仍重要嗎





大灣區消費者行為的變化



消费构成的改变 (Changes in Consumption Pattern)



➤ 大灣區消費者線上購物所注重因素

Q17: 根據下列因素對您個人在網上消費的決定的影響程度，評價它們的重要性

	男	女	總體
a. 產品價格	5.39	5.29	5.33
b. 產品質量	5.88	5.85	5.86
c. 產品的時尚性	5.21	5.18	5.19
d. 與個人形象氣質相配	5.42	5.42	5.42
e. 購買的方便性	5.56	5.54	5.55
f. 配送服務	5.50	5.50	5.50
g. 購買時的服務質量	5.59	5.61	5.60
h. 朋友的推薦	4.98	4.94	4.96
i. 促銷優惠的吸引力	5.21	5.07	5.13
j. 線上帶貨主播的產品銷售技巧	3.98	3.92	3.94
k. 搶先/秒殺等促銷活動	4.55	4.45	4.49
l. 網站廣告的吸引力	4.28	4.23	4.25
m. 提供給忠誠客戶的優惠	5.15	5.12	5.13
n. 是否有退貨/退款服務	5.49	5.47	5.48
o. 品牌的普及度	5.34	5.22	5.27
p. 網上對這品牌的評價	5.35	5.39	5.38
q. 主播對這品牌的評價	4.06	4.04	4.05

➤ 大灣區消費者線上購物所注重因素

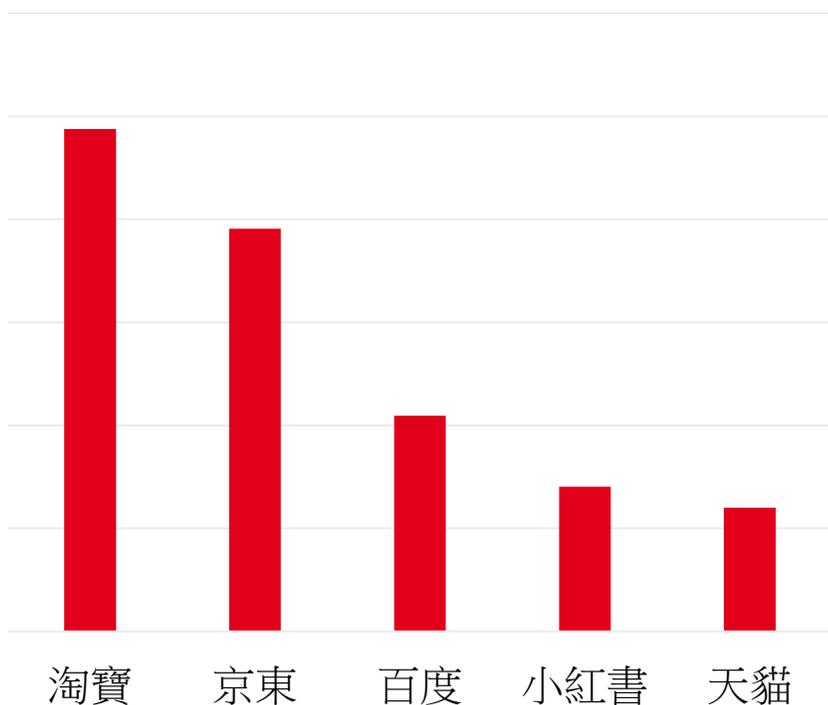
Q17: 根據下列因素對您個人在網上消費的決定的影響程度，
評價它們的重要性

	15-24歲	25-34歲	35-44歲	45-54歲	55-64歲	65歲以上	總體
a. 產品價格	5.29	5.42	5.28	5.26	5.29	5.00	5.33
b. 產品質量	5.90	5.88	5.87	5.65	5.71	4.71	5.86
c. 產品的時尚性	5.32	5.16	5.15	4.90	5.39	4.29	5.19
d. 與個人形象氣質相配	5.52	5.43	5.34	5.25	5.36	3.57	5.42
e. 購買的方便性	5.55	5.58	5.51	5.43	5.61	5.14	5.55
f. 配送服務	5.48	5.52	5.54	5.40	5.68	4.43	5.50
g. 購買時的服務質量	5.66	5.57	5.62	5.49	5.78	5.00	5.60
h. 朋友的推薦	4.91	5.00	4.94	4.99	5.21	4.29	4.96
i. 促銷優惠的吸引力	5.10	5.14	5.13	5.20	5.00	4.43	5.13
j. 線上帶貨主播的產品銷售技巧	3.94	3.94	3.94	3.95	3.96	3.57	3.94
k. 搶先/秒殺等促銷活動	4.53	4.52	4.44	4.37	4.14	3.86	4.49
l. 網站廣告的吸引力	4.23	4.22	4.35	4.22	4.32	4.14	4.25
m. 提供給忠誠客戶的優惠	5.17	5.08	5.13	5.11	5.57	4.71	5.13
n. 是否有退貨/退款服務	5.54	5.48	5.48	5.24	5.50	4.00	5.48
o. 品牌的普及度	5.36	5.24	5.27	5.17	4.93	3.86	5.27
p. 網上對這品牌的評價	5.55	5.39	5.24	5.07	5.07	3.00	5.38
q. 主播對這品牌的評價	4.16	4.03	4.00	4.02	3.43	2.86	4.05

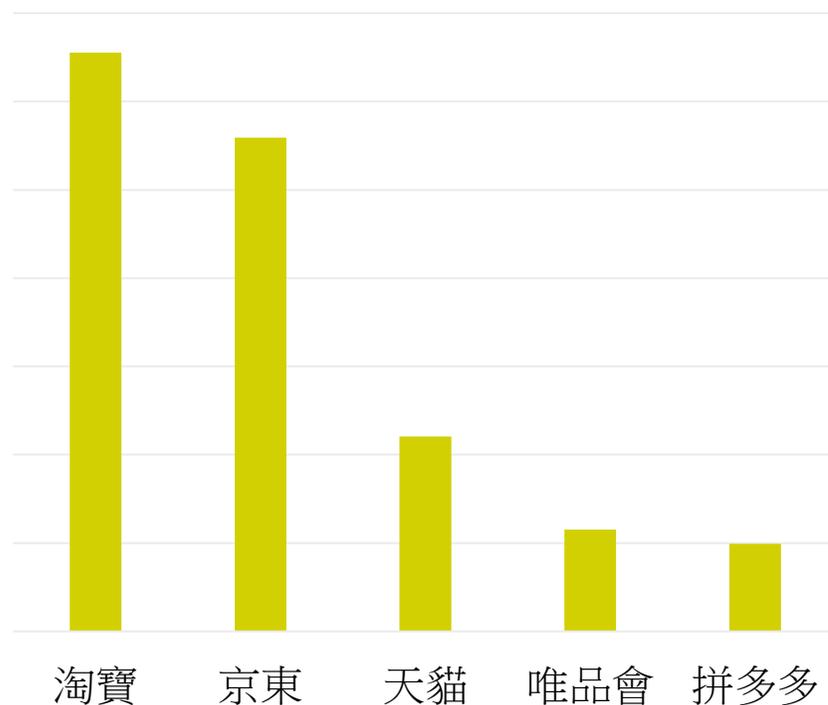
*數據原始題目為問卷中題目Q17

➤ 大灣區消費者常用線上搜索平台及購物平台

五大常用搜索平台

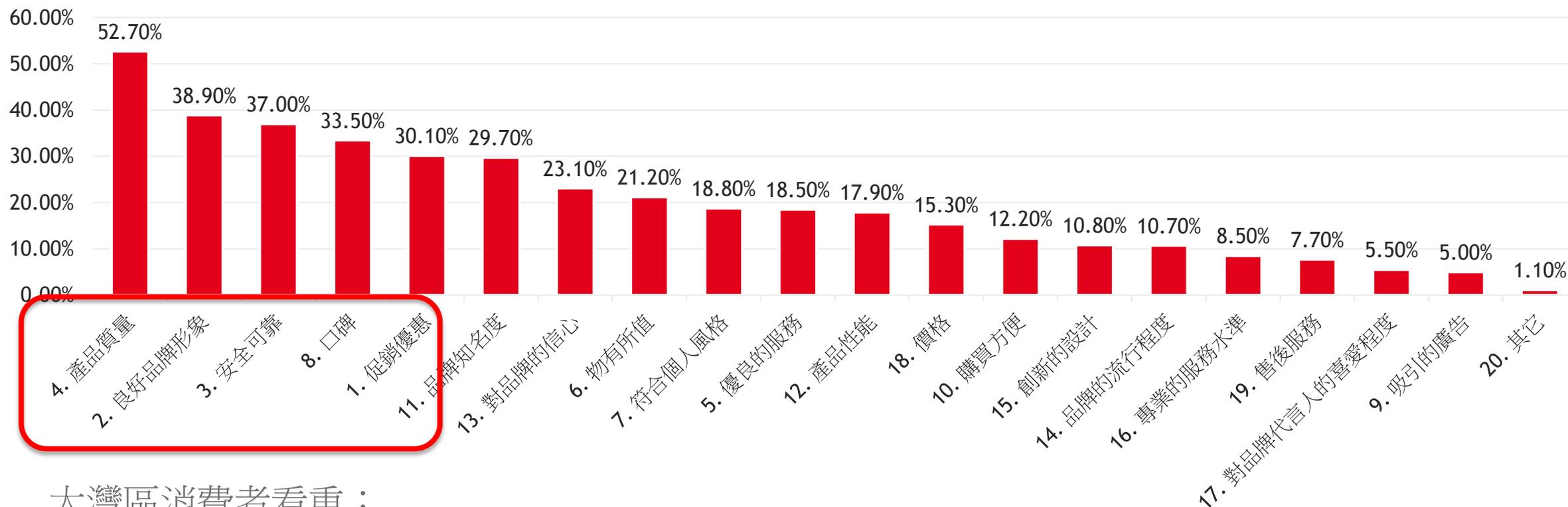


五大常用下單平台



➤ 影響大灣區消費者選擇香港品牌/服務行業的因素

大灣區消費者最看重香港產品/服務的哪些方面？

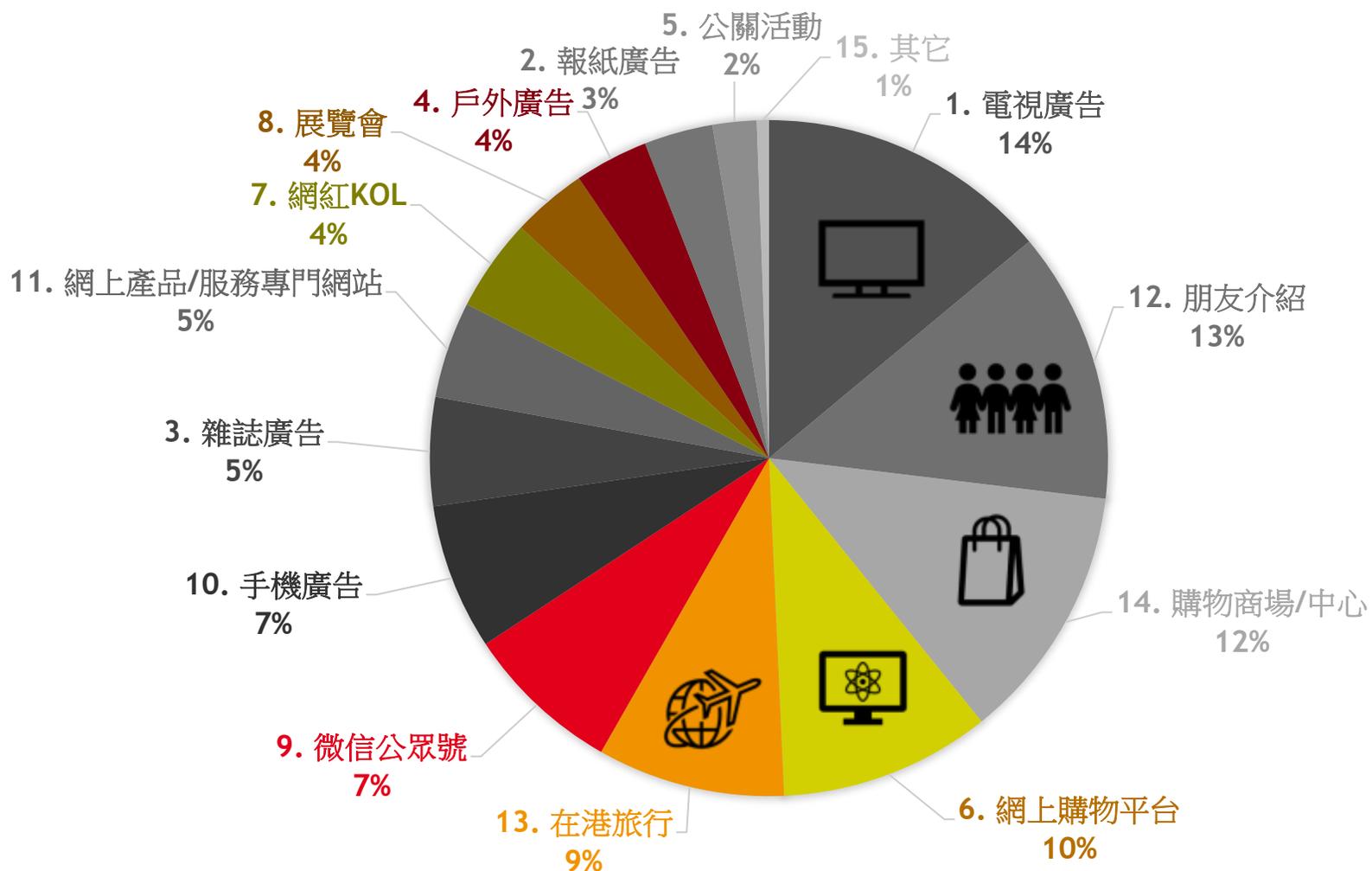


大灣區消費者看重：

1. 質量是第一考量標準
2. 品牌口碑非常重要
3. 是否有促銷也會影響購買

*數據原始題目為問卷中題目Q1b

大灣區消費者了解香港品牌的渠道



五大渠道：

1. 電視廣告
2. 朋友介紹
3. 購物商場/中心
4. 網上購物平台
5. 在港旅行

口碑，線上線下的協調性宣傳乃重要的信息渠道。

*數據原始題目為問卷中題目Q9

➤ 消費者對香港品牌的體驗和認知

Q4: 對以下關於香港產品/服務品牌的描述，請您以7分為標準進行評分。	深圳	惠州	廣州	佛山	肇慶	澳門	江門	珠海	中山	東莞	總體
a 具良好的質量	5.08	4.98	4.79	5.03	5.04	5.00	5.65	5.27	5.73	4.99	5.11
b 設計創新	4.56	4.47	4.64	4.85	4.89	4.75	5.06	4.88	5.46	4.57	4.76
c 更重視維護顧客關係	4.26	4.22	4.33	4.24	4.57	4.60	4.98	4.69	5.35	4.44	4.51
d 服務較好	4.48	4.34	4.56	4.47	4.71	4.52	5.27	4.67	5.62	4.58	4.67
e 物有所值	4.92	4.87	4.73	4.86	4.87	4.83	4.92	4.87	5.76	4.83	4.92
f 廣告較有吸引力	4.29	4.24	4.69	4.25	4.75	4.53	4.47	4.32	5.54	4.14	4.49
g 更貼近潮流	4.79	4.76	4.66	4.74	4.93	4.69	4.98	4.75	5.58	4.59	4.82
h 可以讓人覺得我較有品味	4.36	4.29	4.66	4.61	4.73	4.43	4.66	4.52	5.69	4.54	4.60
i 聲譽較高	5.05	4.86	4.51	4.78	4.76	4.61	5.35	5.13	5.21	4.93	4.90
j 誠信度高	5.09	5.04	4.70	4.92	4.99	4.89	5.57	5.15	5.45	4.99	5.05
k 香港品牌讓人有信心	4.75	4.70	4.71	4.64	4.78	4.53	5.13	4.96	5.51	4.69	4.81
l 總體而言，我對香港品牌是滿意的	4.99	4.92	4.86	4.85	4.95	4.90	5.09	4.98	5.61	4.73	4.97
m 我對香港品牌是有好感的	4.90	4.81	4.82	4.66	4.82	4.74	5.01	4.86	5.72	4.68	4.88

➤ 優勢並不明顯

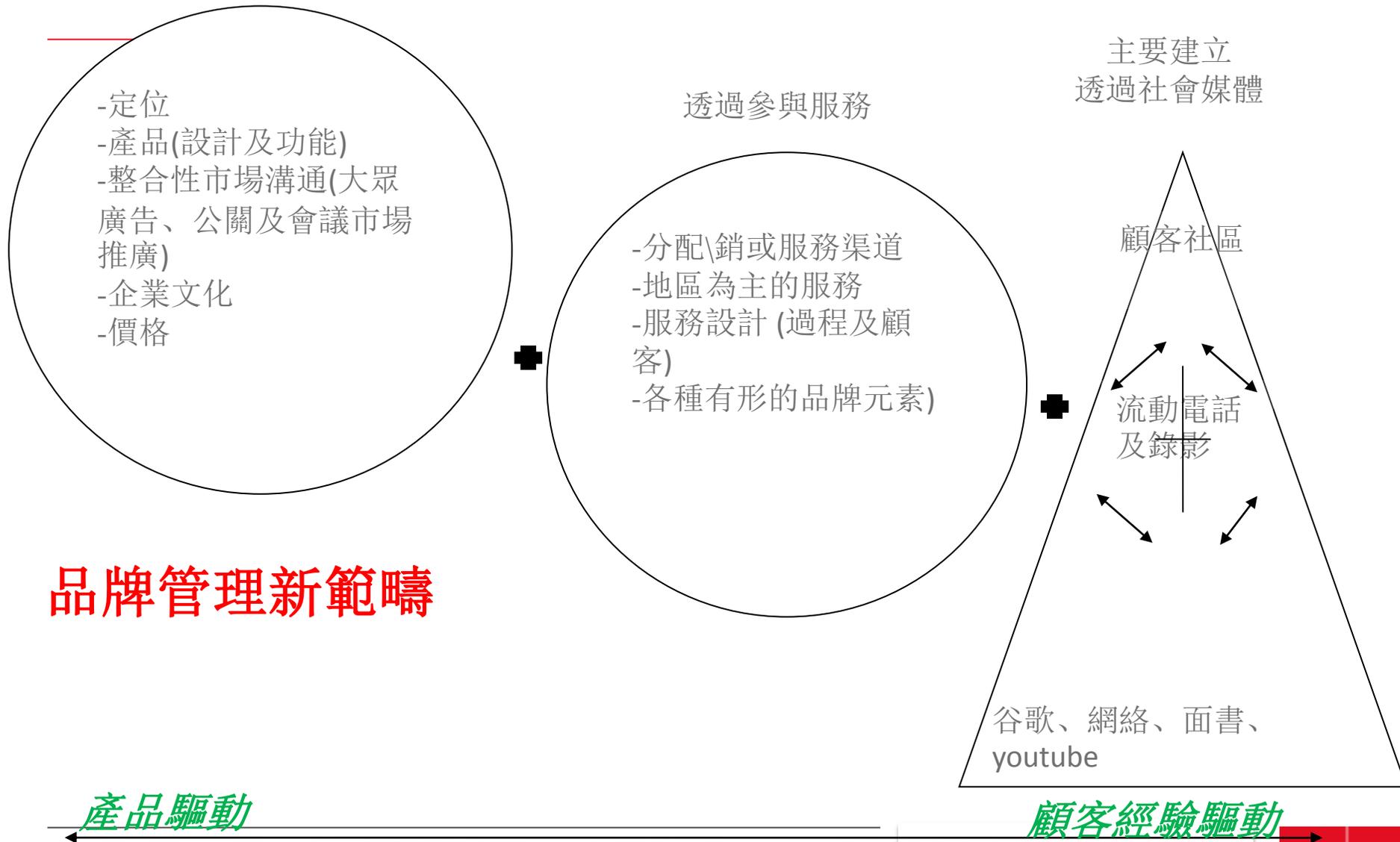


全渠道零售 + 数码营销 + 品牌体验设计 ==》全面品牌管理



思路 视野 行为

全方位创建和管理品牌



品牌管理新範疇

註明：內在因素並不包括在內, 版權者：陸定光博士

品牌管理架构 Brand Management Framework

通过管理策略为企业和顾客创造更多价值



品牌组织及流程 (Organization and Process)

品牌创建及管理能力和(Brand management Capabilities)

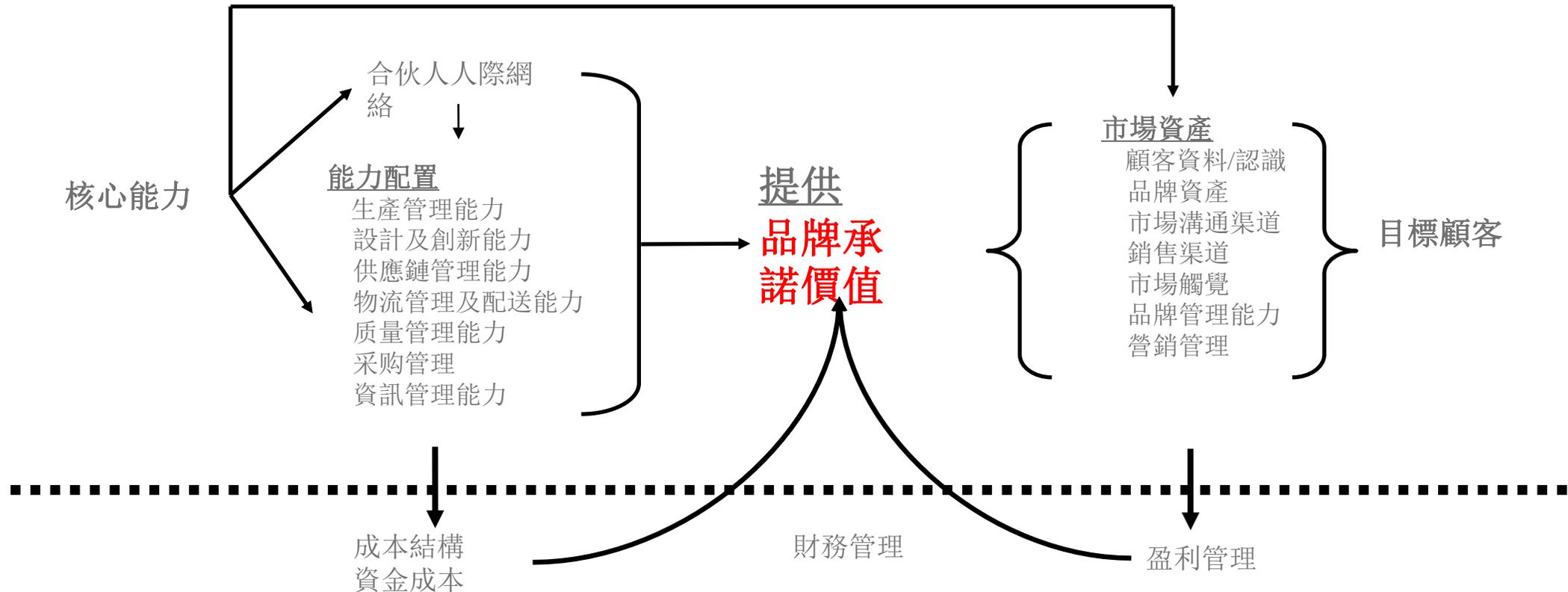
品牌健康评估及监察(Brand Audit and Evaluation)

V. Business Models and Branding

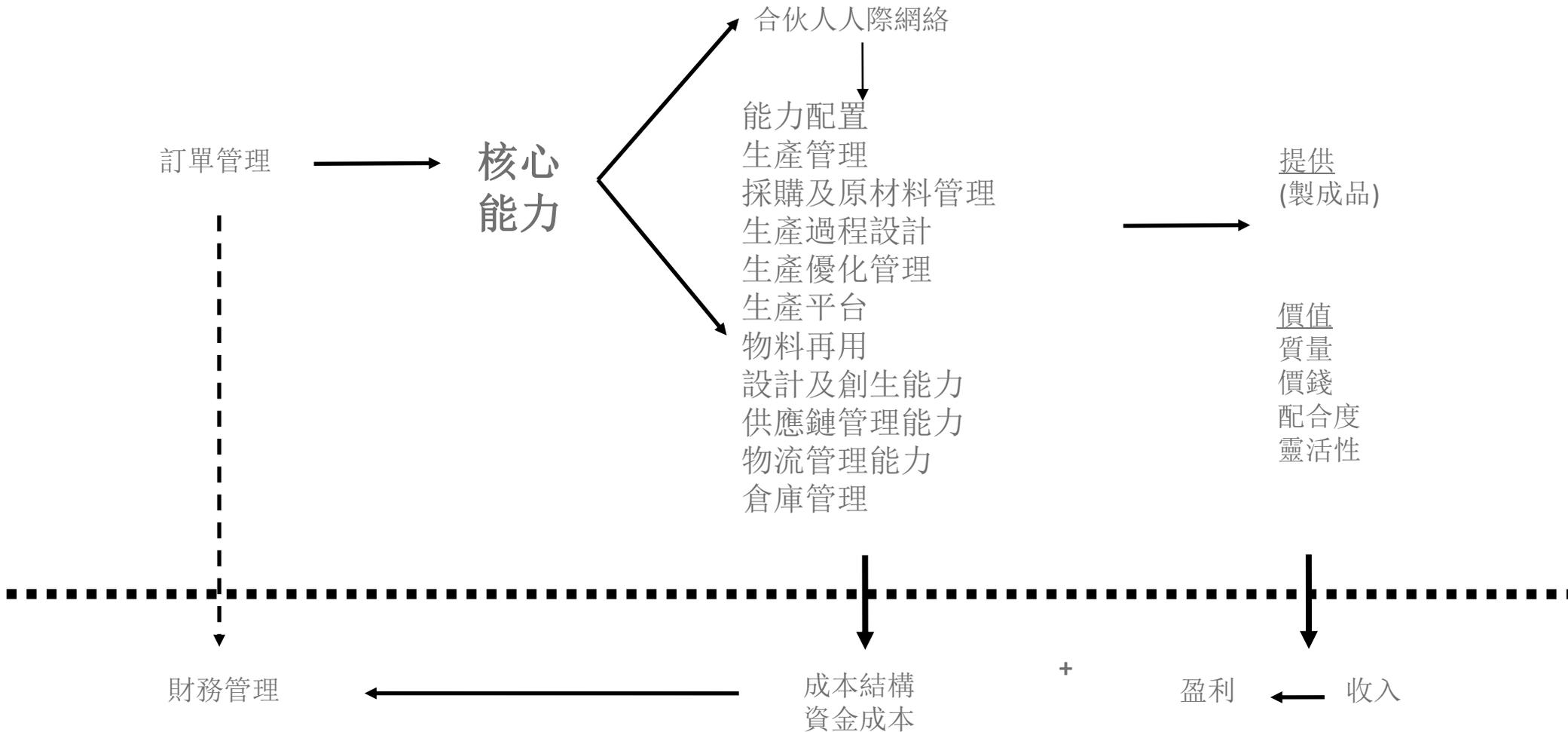
品牌和商業模式

全面的自創品牌商業模式(一)

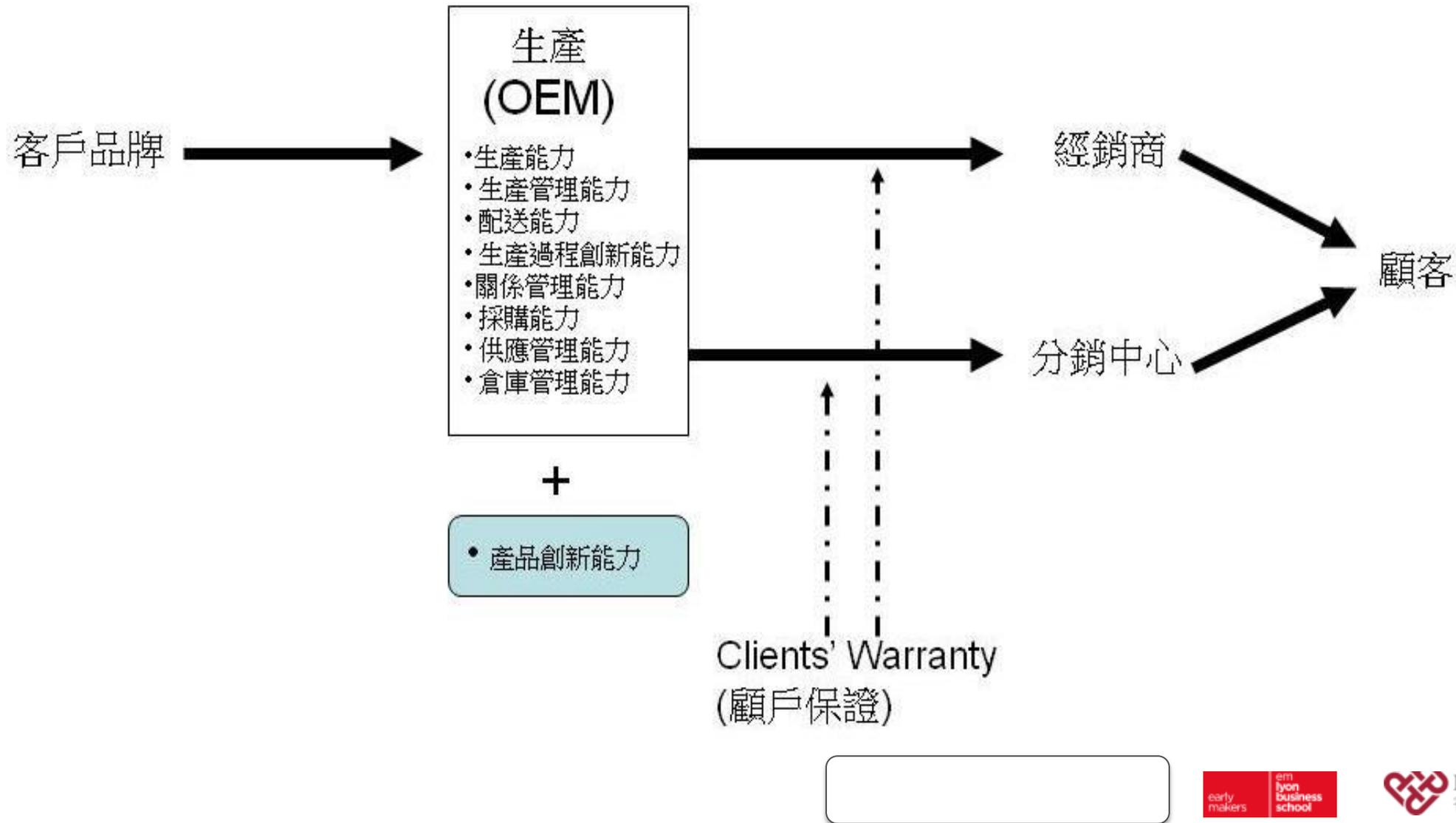
基本結構



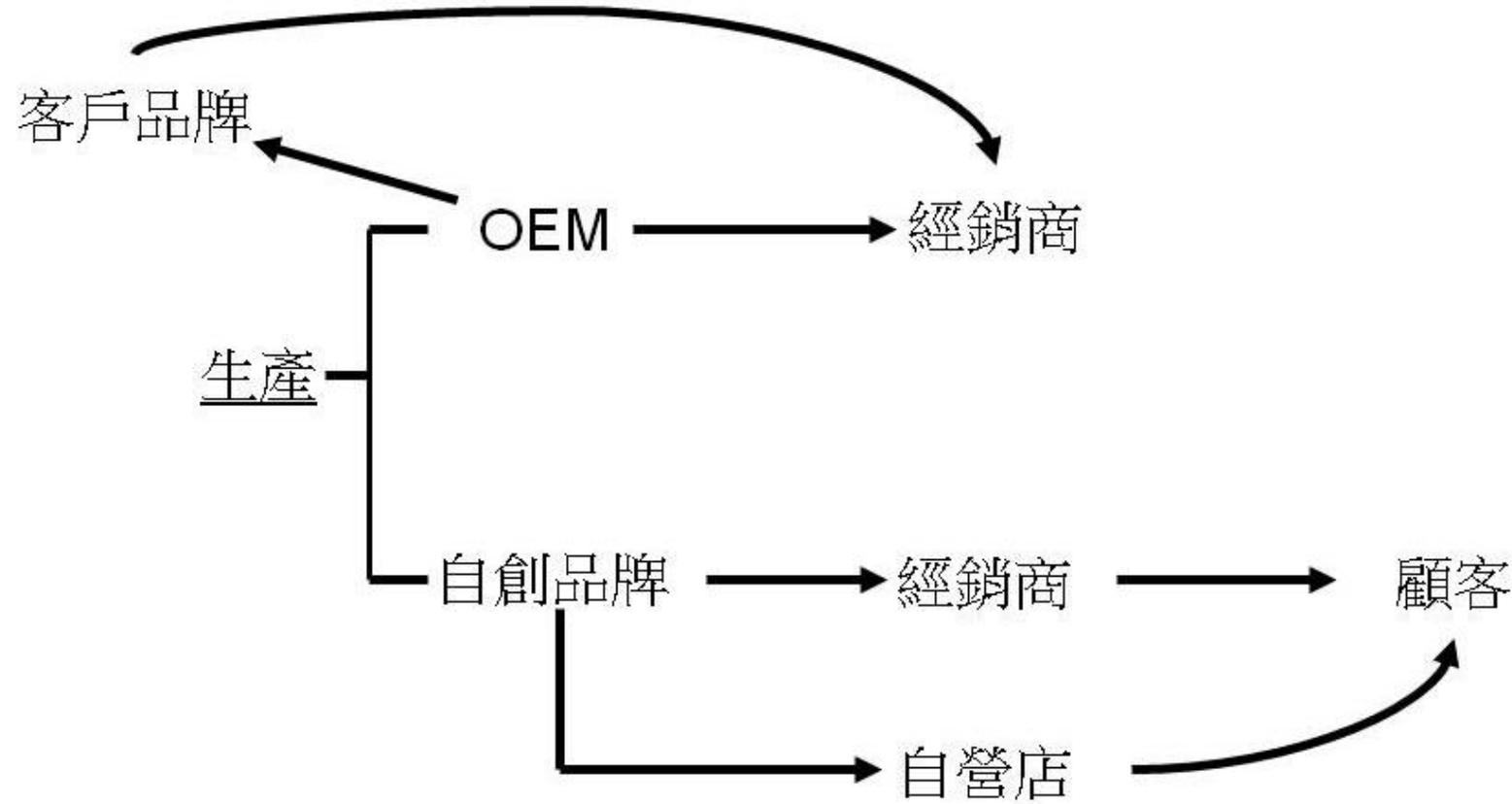
OEM代工生產商業模式



兼營原創設(ODM)計的代工生產商的商業模式



兼營原創設計(ODM)的代工生產商的商業模式(二)



- The End -