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手機應用程式 VS 購物網站給台灣消費者的體驗

Comparing the mobile app VS desktop website online shopping experience for Taiwanese consumers

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本論文係李志濠君（r04749037）在國立臺灣大學企業管理碩士專班完成之碩士學位論文，於民國 106 年 07 月 18 日承下列考試委員審查通過及口試及格，特此證明

This is to certify that the Master thesis above is completed by Lee Zhihao Daniel (r04749037) during his/her studying in the Global MBA Program at National Taiwan University, and that the oral defense of this thesis is passed on (18/07/2017) in accordance with decisions of the following committee members:

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Abstract

It has been 10 years since the introduction of the iPhone, and during this time we have seen a global trend of consumers shifting focus to mobile apps. In particular, the retail industry has sought to develop assets that would allow them to ride this wave. With the balance of power seemingly being tipped in favor of mobile apps, some firms have also chosen to neglect websites, whilst others remain cautious and try to take small steps towards building multi-channel assets.

Both websites and mobile apps have been integral to growth of online shopping. What motivates us to carry out this study is recognizing that whilst for some countries mobile apps are pushing ahead, the statistics in Taiwan paint a slightly different picture. For a nation with high Smartphone adoption rate, high-speed Internet connectivity and a solid network of infrastructure, Taiwan surprisingly shows an unexpected inclination towards websites and not mobile apps.

Utilizing Alex Osterwalder's' Value Proposition Canvas allows us to try to uncover some underlying reasons why consumers still prefer purchasing via desktop websites. Analyzing current value offerings for both platforms will allow us to see how they fare in the eyes of the consumer. With a deeper understanding of our local consumers, we can ascertain if platforms have been providing the right kind of value that our Taiwanese consumers are looking for.

Keywords: Online Retail, Mobile Apps, Websites, Value creation, Value Proposition Canvas, Shopping Platforms

doi:10.6342/NTU201702039

Table of Contents

doi:10.6342/NTU201702039

doi:10.6342/NTU201702039

List of Tables

List of Figures

doi:10.6342/NTU201702039

doi:10.6342/NTU201702039

1. BACKGROUND AND MOTIVATION

1.1 The Rise of Mobile Internet Retail

Transformations have been happening in all aspects of business since the introduction of the smartphone and with it the rise of the mobile Internet. Much of these transformations, centered on advertising and marketing products, have happened at an incredible pace over the last decade (M. Johnston, 2015), pushing businesses out of their comfort zone to adopt new strategies as a response to this 'mobile uprising'. The speed at which businesses have had to adapt to both increasing market competition and demanding consumer preferences have rendered companies quickly irrelevant if they were unwilling or unable to keep up. In 2015, US retailer Radio Shack could no longer keep up with having too many brick-and-mortar shops and the quickly transitioning Internet shopping landscape saw them filing for bankruptcy (A. Gara, 2015) despite a brand name that resonated with technology enthusiasts across the country.

Industries across the board felt the effects as mobile Internet took flight, but perhaps none as strikingly as the retail industry. Before the introduction of the smartphone, consumers were already shopping online via desktop computers, and most major retailers had invested in e-commerce websites in a bid to capture a slice of the online shopping market. Then online shopping became a whole new ball game as consumers were opened to a world where they could browse, search and purchase directly from their smartphones. This presented retailers a new channel or avenue to reach out to their audiences and create meaningful, timely interactions (S. Levin, 2015) and at the same time consumers now had access to information while on the go, no longer being restricted to Internet cafes or home. This was the beginning of mobile Internet retailing.

doi:10.6342/NTU201702039

1.2 Online Shopping in Asia Pacific

Online shopping presents a huge market opportunity in the APAC region, an average growth rate of *34%* over the last 5 years *Table 1.2.1* (Passport Stats, 2017) only served to encourage more new entrants. Last year in Asia Pacific alone, consumers have spent more than US$523'216 Million on Internet shopping, *Table 1.2.2* (Passport Stats, 2017) and this number is expected to increase as developing nations such as Indonesia, Philippines and Vietnam catch up on the technology front.

Table 1.2.1 – Historical YOY Growth %

Historical Market Sizes . Retail Value excl Sales Tax . Current Prices . Year-on-Year Growth%

	2011~2012	2012~2013	2013~2014	2014~2015	2015~2016	Average
Retail	6.3	1.0	4.1	0.6	4.8	**3.4**
Internet Retail	39.6	30.5	42.1	32.8	26.1	**34.2**
↳ **Desktop**	23.6	22.4	20.7	-2.5	-9.2	**11.0**
↳ **Mobile**	-	93.6	146.5	117.2	63.9	**105.3**

Table 1.2.2 – Historical Retail Value

Historical Market Sizes . Retail Value excl Sales Tax . Current Prices . US$ Million

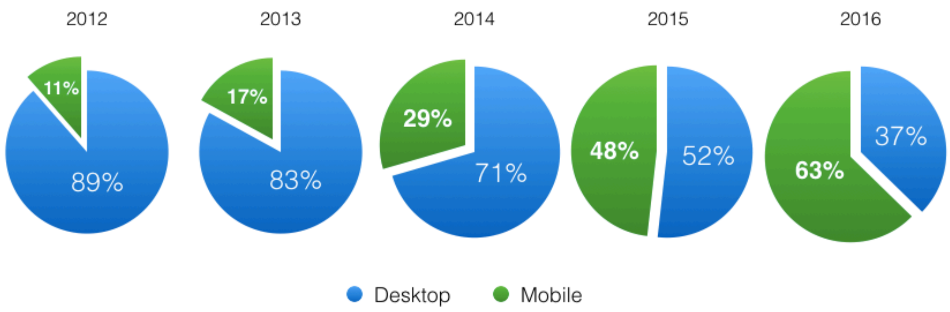
	2011	2012	2013	2014	2015	2016
Retail	4,004,604.8	4,258,375.6	4,300,519.6	4,476,575.2	4,502,387.8	4,717,870.4
Internet Retail	120,685.9	168,450.5	219,899.8	312,546.0	415,007.0	523,216.2
↳ **Desktop**	120,685.9	149,132	182,497.7	220,362.7	214,829.6	195,093.9
↳ **Mobile**	-	19,318.5	37,402.1	92,183.3	200,177.4	328,122.3

What is interesting to note is that this growth in Asia Pacific is now being driven by mobile Internet shopping and the many new shopping apps that are used by consumers. Having only begun with US$19'318 million in 2012, mobile retail has in a short span of 3 years closed the gap on desktop retail, reaching US$200'177 million in 2015 see *Table 1.2.2* (Passport Stats, 2017). As illustrated below in *Figure 1.2.1* (Passport Stats, 2017), we can clearly see that mobile retail has not only caught up to desktop shopping

doi:10.6342/NTU201702039

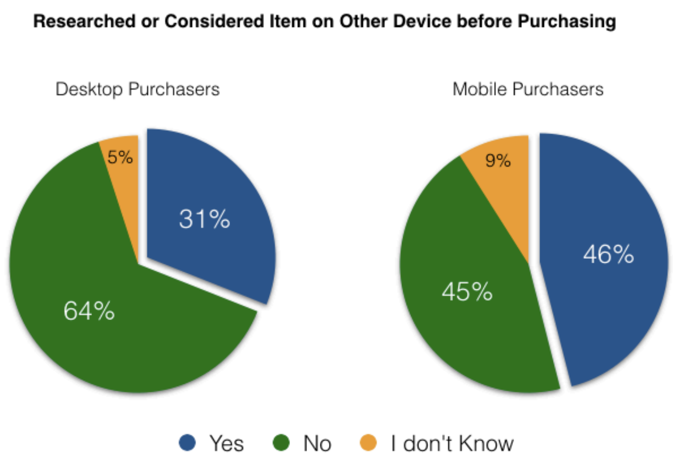
but it has even overtaken it last year, now accounting for approximately 63% of online shopping in the Asia Pacific region.

Figure 1.2.1 – Market Split by Device



Such statistics may point towards a mobile-centric audience in the future, and some firms may be tempted to believe building a website retail presence is unnecessary, but many consumers have more than one device that they access the Internet with, and use multiple devices at different junctures of the retail journey. Based on a 2015 Q4 report of online sales, approximately 37% of transactions have consumers doing research on one device and then completing the purchase on another device (State of Mobile Commerce, 2015). Whether they finally make the purchase using their desktop or mobile, a notable percentage of consumers have researched or initially considered the item using the other device as shown in *Figure 1.2.2* (H. Leggatt, 2016).

Figure 1.2.2 – Research vs. Purchase device



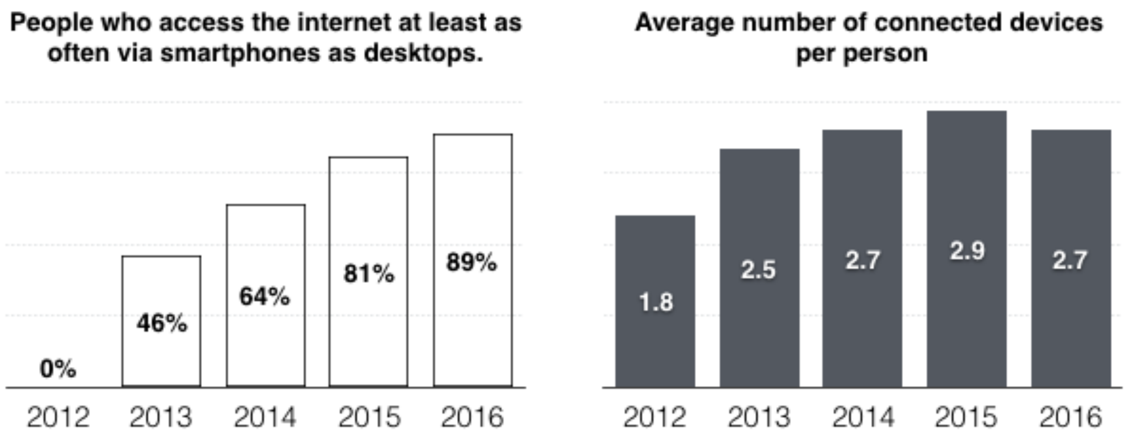
doi:10.6342/NTU201702039

It is thus important also for companies to establish a strong Omni-channel strategy. By using various digital and physical Channels to provide a seamless shopping experience, retail stores are better able to differentiate themselves from competitors (E. Sopadjieva, M. Dholakia, B. Beth, 2017).

1.3 Online Shopping in Taiwan

As we turn our attention to the scenario here in Taiwan, it is also pretty similar in that many consumers own more than one device, 2.7 connected devices per person as shown in *Figure 1.3.1* (Consumer Barometer, 2017) and 89% of Taiwanese use their smartphones just as often as their desktop computers.

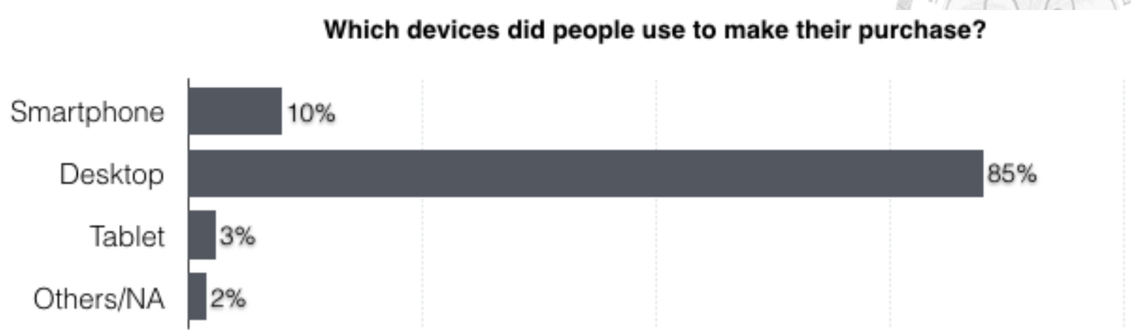
Figure 1.3.1 – Taiwan situation Smartphone



Consumers have more devices and are spending more time on their smartphones, however, that doesn't mean that mobile Internet retail has completely taken over online shopping here in Taiwan. In fact, if we dig deeper into online purchase behavior in Taiwan, only about 10% out of a group of people surveyed by Google in 2015 said that they made the purchase via their smartphone, *Figure 1.3.2* (Consumer Barometer, 2015) while majority still made purchases via their desktop.

doi:10.6342/NTU201702039

Figure 1.3.2 – Purchase Device



Other reports estimate that 70% of Taiwanese online shoppers have tried using their smartphones to make purchases (SP Ecommerce, 2015) and insist that Taiwan is a mobile ready nation. While the proportion of mobile to desktop purchase rates in Taiwan may lag behind the Asia Pacific overall proportion, Taiwan's overall Internet retail market is in no way small, boasting an average growth rate of 10-15% annually over the last 5 years (M. Fulco 2017) and reaching sales of US$34 billion in 2015.

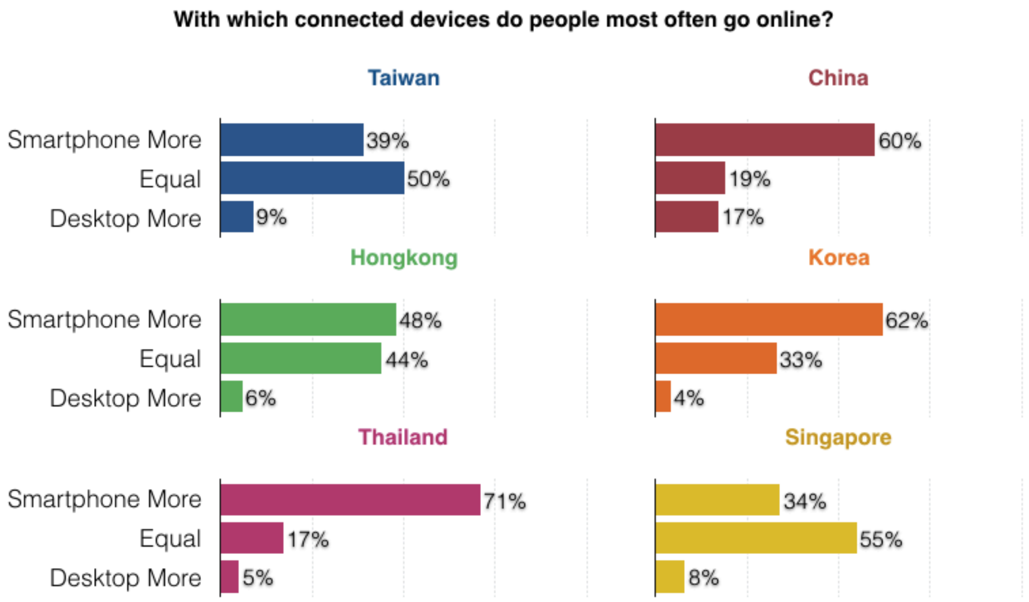
Taiwan's high Internet penetration rate is only but one of the reasons why online shopping is such a success here. Fast Internet connectivity speeds, a unique consumer culture, a very wide selection of available merchandise, a comprehensive logistics infrastructure, and ease of payment with a solid convenience store network supporting (C. Quek, 2016) means the Taiwan market can only continue to grow larger in the future. There are many more articles and different opinions that dive further into the current state of online shopping in Taiwan, but the main focus of this paper isn't to figure out the trending statistics or potential growth rates of mobile Internet retail.

doi:10.6342/NTU201702039

1.4 The Unrealized Opportunity

As mentioned earlier, consumers in Taiwan own multiple devices and spend plenty of time on their mobiles, in fact most Taiwanese go online using their smartphones either more than desktops (39%) or equally (50%) as illustrated in *Figure 1.4.1* (Consumer Barometer, 2015).

Figure 1.4.1 – Comparing other Countries

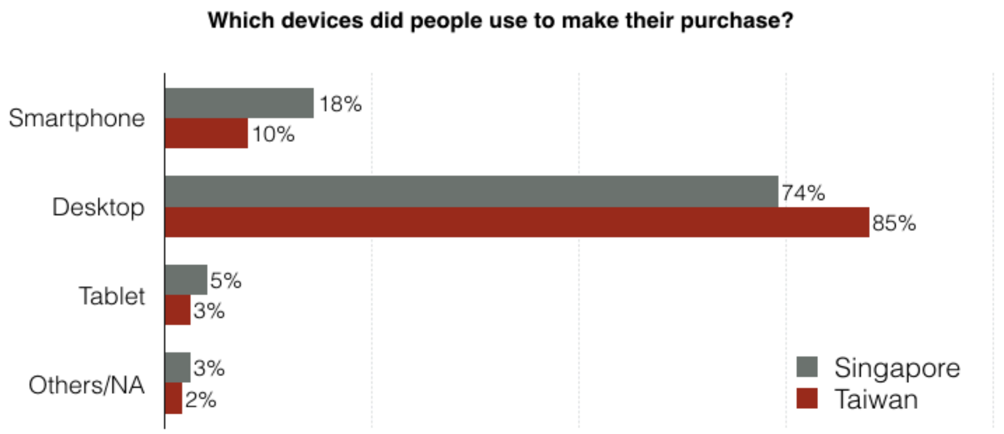


While Taiwan's percentages may fall behind some others such as China, Korea, or Thailand, it is still a indicative sign that with the amount of time consumers spend on their smartphones the mobile platform is a huge unrealized opportunity for retailers. To put things in perspective, Singapore's percentages show a somewhat similar trend to Taiwan, with 34% spending more time on their mobile and 55% equally distributing their time between mobile and desktop. We should thus expect Taiwanese consumers to have an almost similar likelihood to purchase using their mobiles when compared to Singapore. A quick statistical check with Google's Consumer Barometer Survey reveals that even though Taiwan consumers spend more time on the smartphone, they actually

doi:10.6342/NTU201702039

purchase less from this device, *Figure 1.4.2* (Consumer Barometer, 2015). Singaporeans are almost twice as likely to purchase using smartphones.

Figure 1.4.2 – Singapore vs. Taiwan

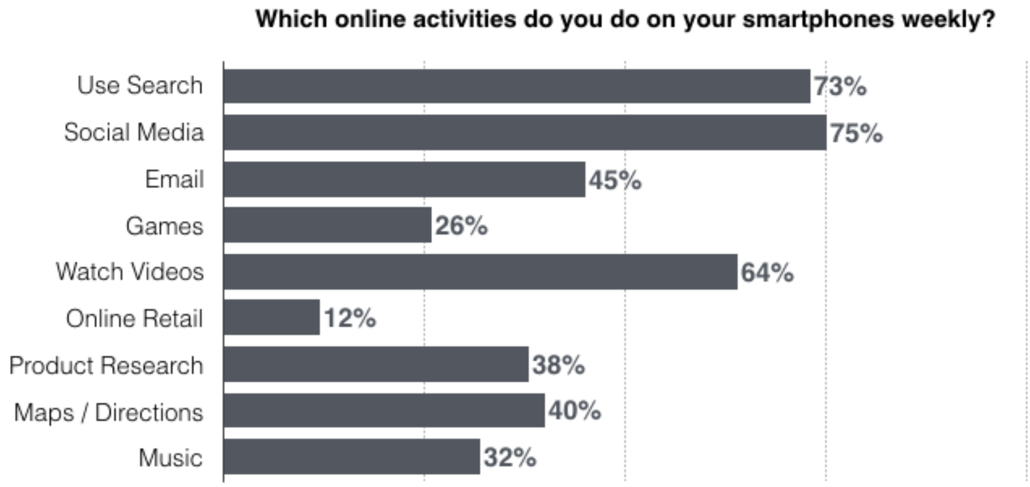


It might perplex retailers as to why with the amount of time consumers are willing to spend on their smartphones that mobile retail has not been as prevalent here in Taiwan as it has in some other parts of the region.

Even before having to dive into researching the possible cause of this, it is fair to guess that consumers in Taiwan are spending plenty of time on their smartphones engaging in other activities. Most common guesses would include the use of Social Media such as Facebook, Instagram and YouTube, and *Figure 1.4.3* (Consumer Barometer, 2016) shows a much clearer breakdown of how the Taiwanese are spending their time on their smartphones on a weekly basis. Bulk of those surveyed said they would be using search, Social Media and watching videos online, followed by checking email, checking for directions and doing product research. Even with this survey being slightly biased in that the time frame is too narrow and only considers a person's weekly activities, as little as 12% said they would be using their smartphones for online shopping.

doi:10.6342/NTU201702039

Figure 1.4.3 – Most Common Activities on Smartphone



1.5 Our Focus

Many have pointed out that Taiwan has the potential to be a strong mobile Internet retail ground, yet we observe a current mismatch between actual times spent on smartphones and the choice of where to make a purchase. Perhaps consumers in Taiwan are not ready for mobile retail, or perhaps there are some underlying causes as to why mobile shopping apps have yet to capture the hearts of the average online shopper.

What this paper hopes to explore and identify are some of the consumer preferences when shopping online using mobile and desktops. We will try to get an understanding of what considerations the Taiwanese online consumers have, and how both mobile apps and desktop websites have succeeded or failed in addressing those needs. By comparing how Taiwanese consumers feel about each platform, it will give us a slightly clearer picture of why there is a stronger preference for website retail over mobile app retail. At the end of this paper, perhaps we would have some basic consumer insights that would allow current and new, mobile or desktop online shopping platforms to find better solutions that centers on user needs and preferences.

doi:10.6342/NTU201702039

2. LITERATURE REVIEW

2.1 Motivations of Online Retail Behavior

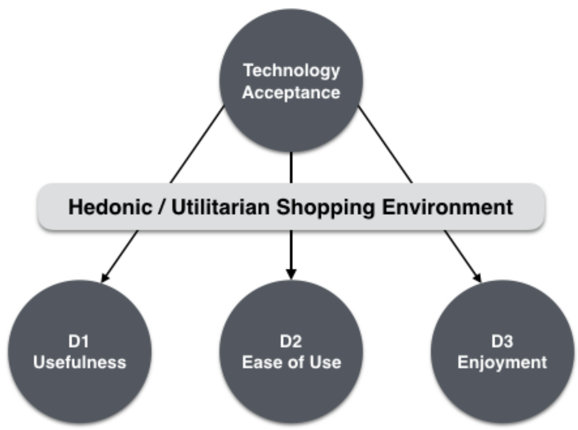
Just as every company does market research before actually developing a product, so too should retailers who are going into the space of Internet shopping. One such area of study that is commonly used is the motivations for online retail behavior. There are definitely functional benefits to online shopping thanks to the multitude of information available at fingertips and quick accessibility that allow users to lower their search cost (Alba et al., 1997). Other scholars have also directed online shopping motivations to the 'fun' and 'entertaining' aspects of connecting with online media and brands while shopping (B. Orwall, 2001).

Online retail is now driven by both utilitarian and hedonic motives (T.L. Childers et al., 2001), and this mix of efficiency and experience will further push the adoption of technology assisted shopping. Childers and his team explores this topic by using a framework known as Technology Acceptance Model or TAM (F.D. Davis, 1993), and touched upon 3 determinants: Usefulness, Ease of Use and Enjoyment. The study shows that these 3 basic determinants mentioned all have a positive relationship to the acceptance of technology assisted shopping, but Childers takes it one step further in his study by adding the context of the shopping environment.

By adding a context to the shopping environment (*Figure 2.1.1*) and classifying them as either utilitarian or hedonic, the hypotheses and results allow us to better distinguish the effects of the 3 determinants.

doi:10.6342/NTU201702039

Figure 2.1.1 – Technology Acceptance Model by Childers



Childers' research also acknowledges that the 3 determinants are but perceptions of consumers and the analysis required additional factors or antecedents that would be enable them to measure how consumers felt about each determinant. These antecedents include the flexibility of navigation so that consumers can complete the search for information (Alba et al, 1997), the technology's convenience and overall accessibility, (D.L. Hoffman & T.P. Novak, 1996). As well as the obvious lack of physical touch whilst shopping online (Alba et al, 1997). After carrying out two separate studies to cater to different shopping environments, they present their findings in which both set of results point towards enjoyment being a consistent and strong determinant of acceptance toward online shopping. Similarly, usefulness and ease of use were also significant across both studies. Needless to say, enjoyment has a stronger effect then ease of use when in a hedonic environment, but in a utilitarian context it is the other way around. The paper urges us to note the varying level of significance depending on given contexts and that consumer's attitudes or expectations may change. Childers concludes their study managing to prove their various hypotheses, highlighting how even in a goal-driven e-commerce environment, it is important to consider that by increasing the level of enjoyment for consumers, retailers are able to better differentiate themselves from brick-and-mortar shops.

doi:10.6342/NTU201702039

2.2 Personalities and Experiences Approach

The adoption of web retail or Internet shopping is based on a prospective user's overall attitude towards the technology (A. O'Cass and Fenech, 2003) and can be broken down into two major thoughts - perceived Usefulness and perceived Ease of Use (F.D. Davis, 1989; E. Karahanna and Straub, 1999). This is similar to the paper by Childers in using a TAM approach to study behavior towards adoption of Internet retailing, but O'Cass adds a different dimension to the study based on three factors that might influence consumer perceptions of Usefulness and Ease of Use.

The first factor mentioned is personality, and O'Cass brings up several authors who point out that opinion leadership influences innovative behavior. These opinion leaders have often been associated with early adopters, choosing to accept the perceived risk to meet their own needs (A. O'Cass and Fenech, 2003), and more importantly act as advocates or opponents afterwards. Personality is also reflected through a consumers' spontaneity or susceptibility to impulse buying online (S. Beatty and Ferrell, 1998) just as he or she would while shopping at a physical store after touching and experiencing the product in the carefully crafted environment.

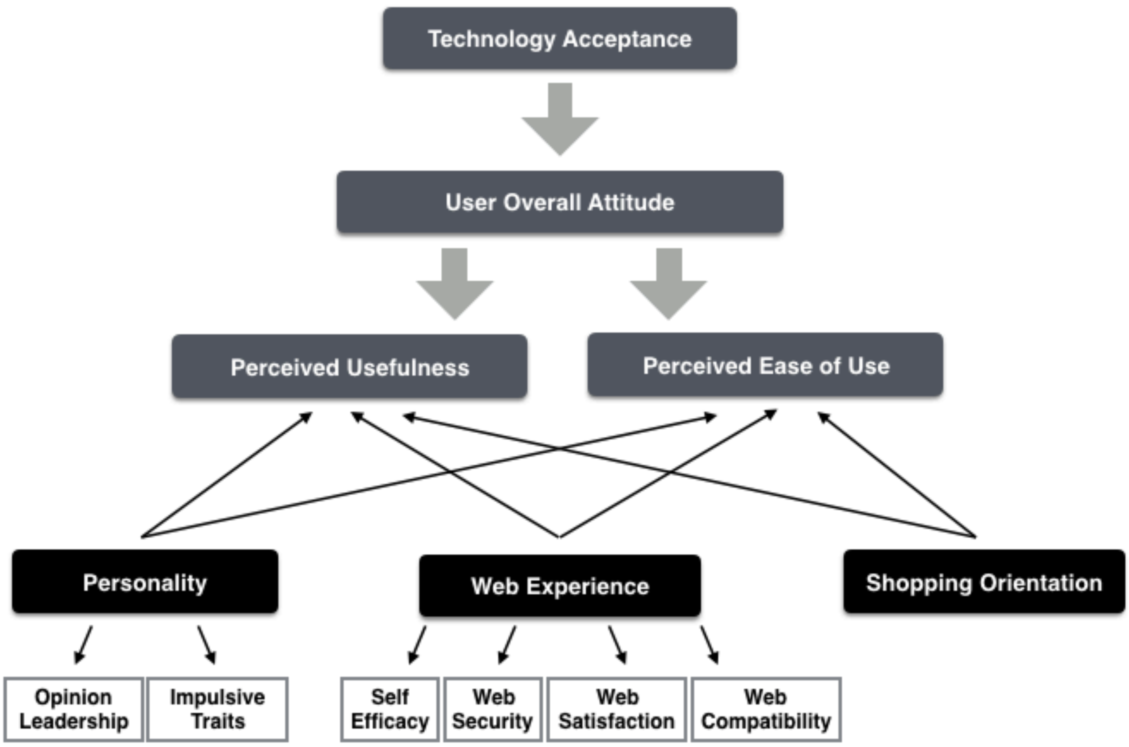
The other major factor that is brought up by O'Cass is consumers' personal web experiences. The retailer or web designer creates most of the user experience, where the sites' security, layout as well as navigation all come together to ensure consumer has a positive and satisfying experience. Shopping online does indeed contain a level of perceived risk in terms of information security, financial risks, not getting the product, poor quality of product etc. so how consumers view the security of a retail site is really important. Only with a satisfied experience will an online consumer be willing to take it

doi:10.6342/NTU201702039

to the next step and make a purchase. A less commonly remembered part of the personal web experience factor is how long or how comfortable a consumer is with using a particular technology, otherwise known as self-efficacy (F.D. Davis, 1989). As a consumer interacts or uses multiple sites, they accumulate more personal experience, and this may create a belief in their efficacy for its extension into retail usage for purchasing products.

Last but not least, the compatibility between the technology and the users' needs, values, past experiences and routines (E.M. Rogers, 1983). This means that the retail technology needs to provide the consumers real value and not just provide an additional storefront on the Internet (A. O'Cass and Fenech, 2003). Then this compatibility, or as O'Cass refers to as shopping orientation, will be able to positively influence both perceived Usefulness and Ease of Use.

Figure 2.2.1 – Technology Acceptance Model by O'Cass



doi:10.6342/NTU201702039

The *Figure 2.2.1* above summarizes the factors as well as components laid out by O'Cass, and his study concludes by highlighting how the many antecedents (Opinion Leadership, Impulsiveness, Shopping Orientation, Web Shopping Compatibility, Internet Self-Efficacy, Perceived Web Security, and Satisfaction with Web sites) affects Internet users beliefs about online retail.

2.3 Summary of Literature Review

Have most people begun simply with the topic of online shopping; there would have been many various paths to take to analyze this domain. The studies undertaken by Childers and O'Cass have hovered on the consumer behavioral aspects and sought to better understand the motivations of buyers in acceptance of technology. The utilitarian vs. hedonic argument presents us with very tangible aspects of discussion like how the navigation and accessibility affect a user. Whilst O'Cass approaches the topic exploring how experiences and personal learning will determine a users' confidence in using web retail. Both studies provide us insight on the factors that may influence perceptions of consumers and are inline with what this paper hopes to explore.

3. METHODOLOGY

3.1 Value Creation As A Foundation

As mentioned earlier, technology is only deemed useful if it provides consumers with some kind of real value (A. O'Cass and Fenech, 2003), thus as we explore the choice between online shopping devices in Taiwan, it is important to understand the thoughts of the Taiwanese consumers and what value they are seeking.

doi:10.6342/NTU201702039

Well known for his work on the Business Model Canvas (BMC) widely used in business schools around the world, Alex Osterwalder also has a second book titled Value Proposition Design focused on the topic of finding and using value to create meaningful products. This is an extension of his earlier work which we all know as the BMC, and the nine business building blocks it comprises: Key Partners, Key Resources, Key Activities, Customer Relationships, Channels, Customer Segments, Value Propositions, Cost Structure and Revenue Streams. They are all important building blocks, but it is the value and customer segments that make Alex Osterwalder's work relevant to this paper.

The BMC was designed to allow a firm to fully describe all aspects of their business in one quick glance and often used where groups can come together to discuss or analyze corporate decisions together. However, filing in some parts of the BMC may be a long drawn out process, involving many contrasting or conflicting ideas from co-workers, and this is where Value Proposition Design comes into play. The main concept of Alex Osterwalder's sequel book is about applying a set of tools to simplify the otherwise messy search for value propositions that customers want. With these set of tools, a team can continually evaluate if they have strayed from what customers desire. "Value proposition design is a never-ending process in which you need to evolve your value propositions constantly to keep it relevant to customers." (A. Osterwalder et al., 2014)

3.2 Osterwalder's Canvas

At the heart of the Value Proposition Design framework is Osterwalder's Value Proposition Canvas, which zooms into two of the building blocks within the BMC mentioned earlier - Value Proposition and Customer Segments, *Figure 3.2.1* (A.

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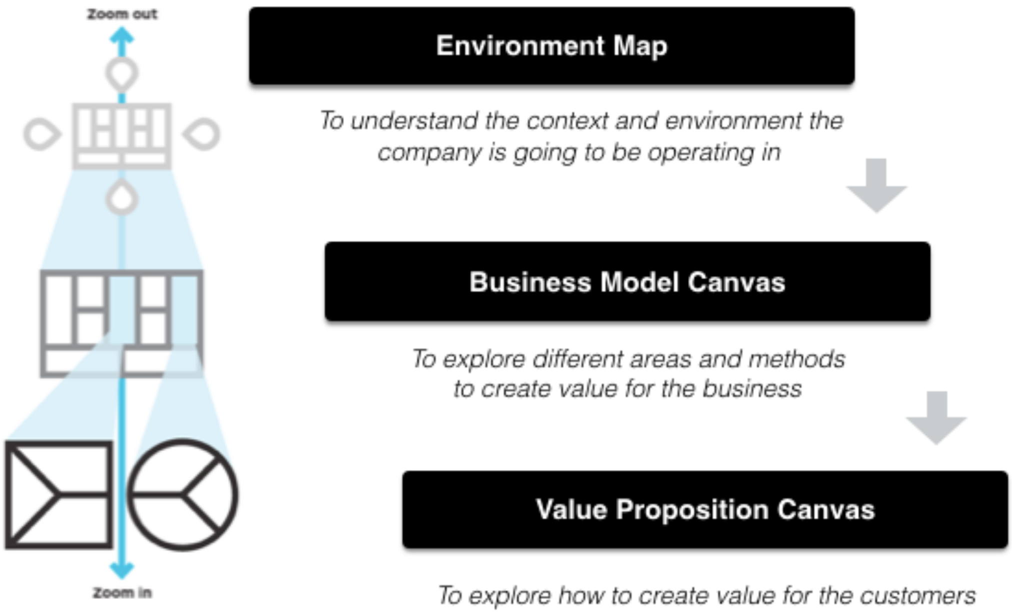
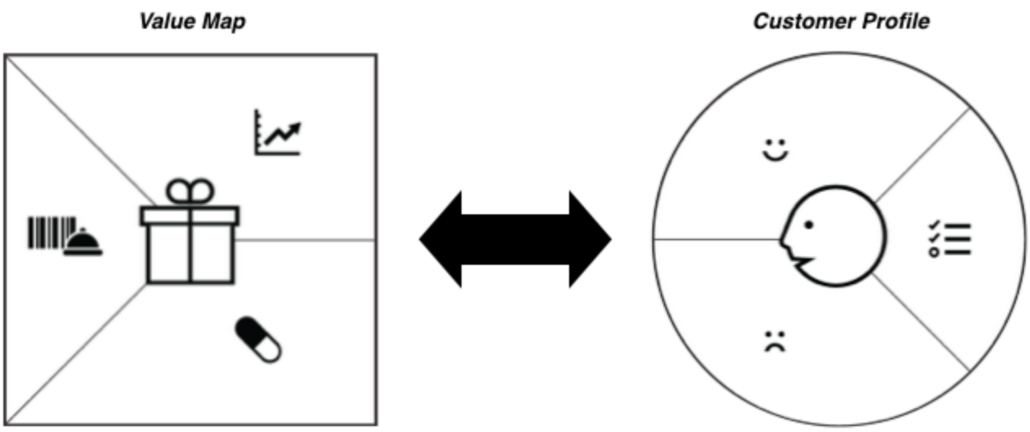
Osterwalder et al., 2014). His approach first brings us from a broad view of business context down to the specifics of creating value for the business, and the Value Proposition Canvas zooms in further to focus on creating the value for customers.

Figure 3.2.1 – Arriving at the Canvas



The canvas as shown in *Figure 3.2.2*, comprises of two sides. The Value Map where a firm figures out what are the values they can deliver through their product/service and the other side is Customer Profile, in which the target audience's objectives, goals and desired solutions are observed.

Figure 3.2.2 – The Value Proposition Canvas



doi:10.6342/NTU201702039

A customer-inspired approach requires us to understand the "Gains", "Jobs" and "Pains" of the customer and then tailor our product/service to satisfy the needs and also relieve the pains they may have. Many a times, companies come up with products/services that do not actually provide the value that customers seek, leaving a manager with many questions on performance and sometimes spending unnecessary money to carry out marketing efforts that remain futile. In order to avoid that, firms need to find a fit between value map and customer profile, and Osterwalder explains the elements on both sides of the Value Proposition Canvas, as shown in *Table 3.2.1* below. (A. Osterwalder et al., 2014)

Table 3.2.1 – Building blocks of the Canvas

VALUE MAP	
Gain Creators	How your products and services create customer gains?
Product/Service	What Products/Services do you offer your customer?
Pain Relievers	How your products and services alleviate customer pains?
CUSTOMER PROFILE	
Customer Gains	What outcomes and benefits do customers want?
Customer Jobs	What are customers trying to get done while using your product?
Pain Points	What annoys the customers before, during or after the process?

After understanding each element of Osterwalder's Value Proposition Canvas, we can now move on to explore the customer profile of Taiwanese consumers and also what they think about the current market players' offerings. This would be similar to exploring customer perceptions about Usefulness and Ease of Use, which as we have seen earlier influence customers' attitude towards adoption. This will be mainly achieved using two main tools, interviews and surveys.

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3.3 Insights Through Interviews

We recognize that there are many variables that could influence a consumer's choice of shopping platform. The customer demographics, the product category, as well as the type of mobile application operating system they are using. These are all variables that might throw a statistical study in a particular direction. If we were to approach this paper with the same statistical testing methods, it would mean carrying out a study based on preconceived ideas of the variables and would be biased. However, this paper assumes that we know nothing about how the Taiwanese consumers feel towards online shopping. Thus instead of approaching this with a statistical analysis, or using a Technology Acceptance Model (TAM) like Childers and O'Cass, this paper will adopt a more qualitative approach of exploration using interviews.

By utilizing in-depth interviews, it will allow us to thoroughly explore feelings and motivations of customers. A semi-structured style will be used so consumers can freely share their thoughts, which may jump from one to the other while conversing. Basically this allows much more space for interviewees to answer on their own terms than structured interviews, but still provide some amount of structure for comparison across multiple interviewees (R. Edwards and J. Holland, 2013). A list of questions in the form of an interview guide will be used, but there is flexibility in the arrangement of how questions are asked and how the interviewee can respond. With the freedom to probe for answers, it is easier to follow a line of discussion opened up by the interviewee, and a dialogue can ensue. (R. Edwards and J. Holland, 2013)

Interviews also allow us to select individuals that fulfill a certain criteria – experience, gender and age. Consumers with sufficient online shopping experience will be better

doi:10.6342/NTU201702039

able to share some of the challenges or feelings of using the current online platforms. Also as more and more men take to online shopping, we wanted to ensure a gender balance in our choice of interviewees and while there is an increasingly broad age bracket of consumers shopping online, we wanted to narrow it down. For our study the focus will remain only on a broadly defined “youth” category that comprises University students and young professionals, we believe this group have the right spending power and make up the bulk of online shoppers. As such we will adopt a single Customer Profile comprising of both students in the mid to late twenties and young working professionals in the early thirties.

The final interviewees were selected through asking around personal networks, and consisted of 4 individuals. (Their names are kept anonymous to maintain privacy but we shall refer to them as stated below)

1) Y: Female, University Student, 25 yrs old
2) C: Male, University Student, 26 yrs old
3) L: Female, Working Professional, 33 yrs old
4) H: Male, Working Professional, 34 yrs old

The insights and sharing from our interviewees would give us the required ingredients to fill out the Customer Profile of Osterwalder’s Value Proposition Canvas.

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4.4 Surveying More Consumers

Since the interviews will focus on just a few individuals, as a closure to our study an online questionnaire will also be used to poll a larger sample sized audience. The survey enables us to reach out to more online consumers and test if the insights from the interview are representative of these consumers or simply just the thoughts of a few select individuals. The survey will focus on consumer goals and habits, their preferences, pains and expectations of online shopping platforms. It will also allow us to get additional perspectives from the larger audience that may have been left out from our conversations with the interviewees.

Together both set of results would provide us a much more comprehensive picture of the consumer preferences, the thoughts and also the motivations behind the online retail scene here. It also serves as a check at the end of our paper to confirm how accurately we have filled out our Value Proposition Canvas.

4. DEVELOPING OUR VALUE CANVAS

4.1 Carrying Out the Research

Over a period of 3-4weeks, we met up with our interview candidates, preferably at less formal settings to give them an environment that they would be comfortable in. Each interview lasted an hour, giving us ample time to talk freely about the topic, with much of the interview being held with a casual conversation style.

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Instead of taking notes during the interview, we sought permission to record the audio clips of the interview. This allowed us to focus much more on having meaningful conversation with the interviewees and not have to be distracted with taking notes, it was great as it allowed us to have a much simpler job when going back to listen to the interview. The interviewees were more than willing to help in this aspect, feeling none of the pressure of being recorded whatsoever. They not only provided us insights based on the questions asked, but also points that we didn't even consider. Qualitative interviewing also meant we were able to adjust as we went along - learning points from the first interview were then taken into consideration during the later interviews.

The interview results were then collated, compared and use to populate the Customer Profile, which consists of 3 main components, and we will go through them in the following sections.

(I) Customer Jobs
(II) Pain Points
(III) Customer Gains.

4.2 Customer Profile - Exploring Customer Jobs

Our first step to completing the Customer Profile is to explore the goals and objectives of users based on our detailed interview insights. Shopping online has become somewhat of a norm to many people in this day and age, yet many people have rarely given it much thought why they are going online to buy something or what drives them to choose to use the online method. *Figure 4.2.1* below summarizes the questions that we need to answer.

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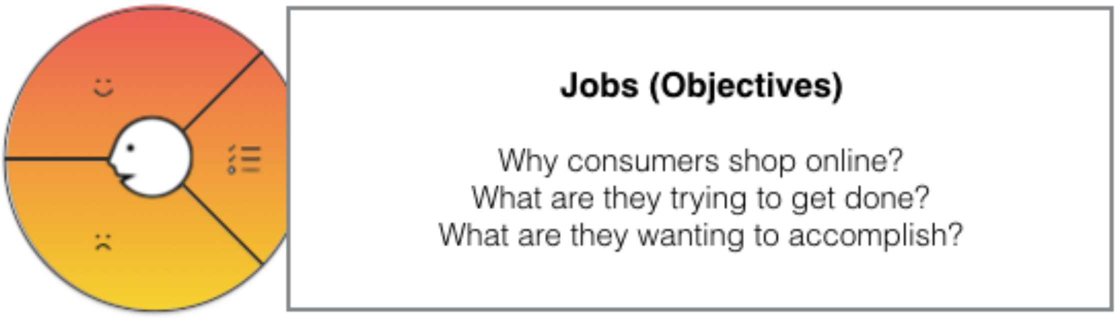
Figure 4.2.1 – First Component of Customer Profile



A variety of reasons were mentioned during the interviews including finding items that would not have been sold in Taiwan stores, purchasing from overseas brands, saving money with generally lower prices, and also saving time when they can browse and find many items online. Here one of our interviewees mentioned about the purchase objective of getting items from overseas:

> ***Y****: "Online shopping allows me to find some things I can't find elsewhere, for example a hair care shampoo that you can't find in Taiwan. Other items that you can only find from overseas and ship them over."*

At the same time, one of the common themes that came up from all four of the interviewees was convenience and how buying something online now allowed them the freedom to do it without having to go out around looking for something. They were now able purchase items using less effort than going out to the store, searching for it and going from store to store until finally making the purchase or giving up.

> ***Y****: "I bought a Bluetooth earpiece recently as they could deliver in 24 hours, and I wanted to get it quickly, but overall it is also mainly because of the convenience of getting it from searching to purchasing to delivered to me"*

doi:10.6342/NTU201702039

***L**: "Sometimes you're just too busy to go to the store, and if you need daily items you can just purchase them online via PC Home. I think convenience is also key, it means I don't have to go out and look for something"*

With this new simplicity of online shopping, consumers do not have to expend as much effort in looking for items and buying it. This reduction in effort provides consumers convenience that makes it meaningful to shop online, and also saves time for users. If we simply followed a model of a user's journey, the "Jobs" that our respondents shared with us were the browsing, searching for items, comparing, and checking out or paying for items.

However Osterwalder's canvas wasn't based on simply identifying the customer jobs along the user journey, but also takes into consideration the level of importance for those goals and objectives. When asked what were the main goals or to rank the importance of the "Jobs", our interviewees all cited convenient purchasing and saving money with cheaper prices off the top of their head.

***L**: "Price! Some things you can't buy in Taiwan, but you can find online. Also some things you can find at the actual stores, but it will be cheaper online as they don't have to pay for overheads"*

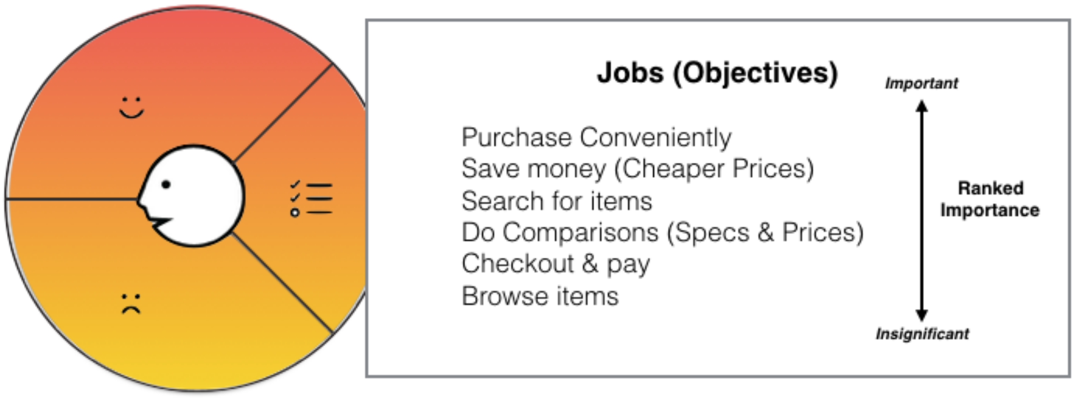
***H**: "Price is cheaper and saves effort instead of going out to buy stuff as it is more convenient"*

***C**: "Convenient, now I can quickly find and buy many things without actually running to the physical store"*

doi:10.6342/NTU201702039

All 4 of our interviewees gave very similar answers and with the responses that we managed to obtain, it was then easy to fill in the Customer Jobs section while ranking them in level of importance.

Figure 4.2.2 – Ranked Customer Jobs Section



As seen in the ranked list, the primary objective when going online to shop was basically to purchase items conveniently from the comfort of home or even while they were on the go. This was followed by the ability to save money thanks in part to cheaper prices offered online. The variety of available products online also allowed for users wanting to search for hard to find goods or a particular item to turn to online shopping. In the midst of the shopping process, users would want to compare items in terms of size, technical specifications and prices. One of our younger interviewees felt that it was actually a major part of her shopping journey.

> ***Y**: "Comparing items and prices is one main objective while I'm shopping. For the Bluetooth earpiece I purchased recently, I did a lot of comparisons to find the best deal."*

Not ranked so high on the list are the checkout & payment process, and surprisingly the browsing of items. Upon a deeper look into some of the responses, we realized that our

doi:10.6342/NTU201702039

interviewees could be broken down into 3 distinct groups, those that didn't browse but just went online with something in mind, those that were browsing regularly whilst shopping online and those that lie somewhere in between. Only one of our interviewees had indicated to have really browsed shopping platforms on a regular basis. Perhaps offering a valid explanation to why Browsing was not ranked as important by our interviewees.

Our conversations not only allowed us to find out the "Jobs" users were trying to accomplish, how they were ranked in level of importance, but it also provided plenty of feelings and thoughts that revolved around usefulness and ease of use. With the latest technologies, consumers are able to shorten the time required at each stage of the purchase journey: Log on, Search, Compare, Decide & Pay, Delivery & Collection, thereby allowing them to be more satisfied with the whole shopping experience.

Still this online shopping experience must continue to develop and improve. It must be able to help consumers find what they are looking for easily and quickly, and provide consumers the convenience to purchase items from anywhere. It must provide sufficient range of products so consumers can find various items and it must be able to offer consumers attractive prices. Consumers have very clear goals that they want to achieve shopping online and if online platforms fail to assist consumers in achieving them, they have planned to fail.

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4.3 Customer Profile - The Customer Pains

Moving on to the second component of the Value Proposition Canvas, we set out to explore the "Pains" or frustrations that users have while going through the online shopping experience.

Figure 4.3.1 - Second Component of Customer Profile

To provide more clarity while examining the "Pains" of consumers, we will look at websites and mobile apps separately. Since prior research and our interviewees have both told us that Taiwanese consumers do not favor apps, let us first take a look at the frustrations of using mobile apps.

Of course we all know that the mobile screen being smaller will pose certain issues with consumers, but hearing some of these issues from the interviewees offered a clearer understanding of why it mattered.

> ***Y**: "I don't use apps because most of the time I like to compare and open many websites. On the desktop you can open many windows to compare items and prices. On apps you can't open multiple apps without switching in between and you can't view multiple items at once to compare."*

doi:10.6342/NTU201702039

***C**: "One downside is not able to view many things at once on mobile app, on the app you can only see 4-6 items at once, but on the desktop you can view many more things. So harder to do comparisons on the mobile so that is also a problem - especially comparing across different sites is almost impossible."*

***L**: "Viewing experience on mobile is terrible as you can't view many items at once - you always have to keep clicking next page next page - I think its one of the annoyances."*

Clearly the limitations of displaying multiple items on a smaller screen has had huge influence on consumers, in terms of the difficulty in comparing and also the excessive navigation users have to go through while browsing or searching for something on the app. This limited view of items goes beyond just viewing photos of items but also the details and information presented when users are looking into the specifics of a product. Other frustrations include lack of delivery options, lack of third-party payment options, difficulties in browsing and the way search results are displayed.

When considering some other product/service categories, perhaps pain points or frustrations do not heavily dissuade the user and many a times users might just chose to overlook such frustrations. This does not seem to be the case when it comes to using mobile apps for online shopping, which seems surprising even more so since we are so reliant on our smartphones these days. When asked if those pain points and frustrations actually affected their purchase decisions, 3 out of 4 interviewees insisted that because of their frustrations they would choose to use a different app, or abandon the mobile app altogether and revert to website shopping.

doi:10.6342/NTU201702039

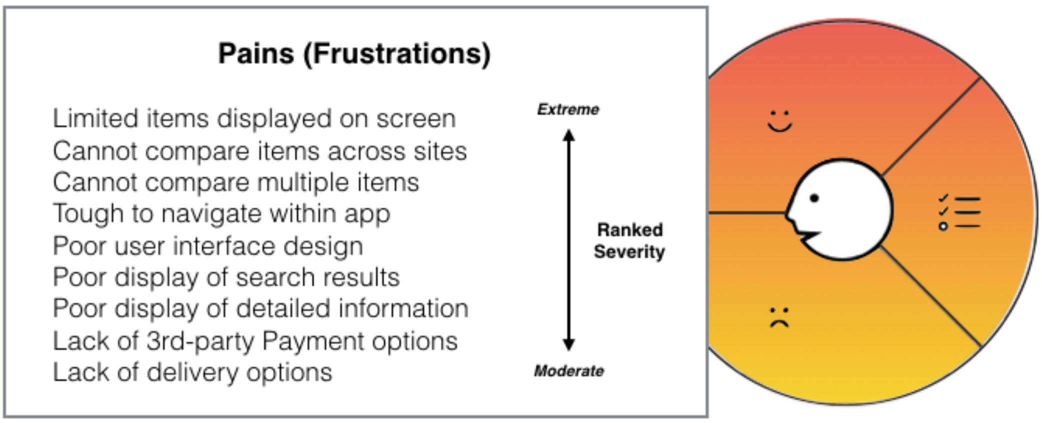
C: "If they have limited delivery options then, I will choose another seller/site. Also if I'm doing comparisons then I wouldn't choose to use mobile app but the desktop."

Y: "For me it's a major consideration. I don't browse or purchase on app as I can't do my comparisons and 'homework' or research on the products."

L: "It does affect, if I have to click through many pages then I will just forgo this app and go to nicer designed overseas sites. Some of the overseas sites are also nicer looking."

Although our interviewees did not provide too long a list of frustrations for using mobile apps, they did all reiterate points that centered on simplicity and convenience. Those also made up some of the points that were ranked higher in terms of "Pains" while using mobile apps for shopping.

Figure 4.3.2 - Ranked Pain Points (MOBILE)



The top frustration for consumers was the limited number of items mobile apps displayed. This not only affected the browsing experience, the way search results were

doi:10.6342/NTU201702039

displayed but also the navigation and overall user experience as mentioned above in some of our direct quotes from interviewees. This was pretty much what we expected, but the next few “Pains” were unexpected – in that consumers were really keen on comparison features or bothered by the difficulty in trying to compare while using the mobile app. This highlights the importance of comparisons while seeking to make a purchase and is somewhat reflective of the brick-and-mortar shopping journey as well. Consumers have a tendency to want to get the most value out of their shopping, thus are looking to compare and contrast items, choosing the one that gets them the most bang for their buck.

Although the next few points in the list of frustrations could very well be a cause of the small screen size mobile app developers have to work with, we have decided to look at it independently of that. Poor user interface, unintuitive navigation and display of information are all a choice of design. Some apps have gotten it right, and have thrived in the mobile retail scene. Some have just placed less thought into design and tried to shrink down the website into a mobile app. The user experience is thus not ideal, when the flow and the display of information have not been calibrated to a mobile app shopping process.

The final two “Pains” are less critical to our interviewees, and in part just poorer execution of value-added features for customers. These are frustrations that could often be overlooked by users if they find what they are looking for and really like a certain product.

doi:10.6342/NTU201702039

Now let us compare that with the website experience that our users have. Here the answers were far less homogeneous, with different interviewees basing their answers on different phases of the shopping experience. Some were more frustrated with the initial browsing and searching phases of shopping as explained below.

> ***Y**: "Because I really like to click and open many windows while searching for something, there are some annoyances. Some products are identical but are being sold by different sellers, but it is only after I clicked everything that I realize that actually I'm wasting time looking at duplicates. Also for comparing across websites that is still sometimes not as easy."*

> ***C**: "For some websites in which the layout is very messy, then it becomes overwhelming! Some example like on one page you are bombarded with 200 items, which makes it difficult to shop too, so I think there should be a balance between how many items to display - mobile app too little vs. desktop too many."*

Others were focused more on the latter stages of the shopping experience, the decision making portion and the payment.

> ***L**: " Price comparison is a big factor for me when trying to make a decision, so maybe in the sense of comparing the process has to be easier. Also maybe when making payment, the filing in of information - sometimes that is annoying to have to keep redoing."*

The website experience clearly involves a different set of issues for consumers. We also note that the frustrations for using websites have a less critical impact on a user's

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decision to continue using the platform to purchase goods. Pain points have to be rather severe for it to deter consumers from using the site to purchase.

> ***C**: "If the website has a very poor layout, it turns you away at the first step. That's why I like to buy clothes at the physical store, but other than that I will still make a purchase as long as I need it. I feel it is also helped by the refund policy in Taiwan, which makes it easy for me to purchase and if it doesn't match my expectation then I can return it."*

> ***L**: "If I really can't find something because of the poor search results then I will go elsewhere to find it. Especially in Taiwan it is also very easy to get items offline, unlike US where they have to travel very far to a store."*

Nonetheless, we were able rank the various "Pains" asking our interviewees to estimate the severity of those frustrations that they mentioned. As different users had different frustrations we had aggregated them into a single list based on how agitated the users were regarding their own pain points.

Some of our interviewees had felt that the frustrations were a little annoying but did not have too much difference on whether they would continue to use the stated platform - in this case websites for online shopping. Others felt the annoyances were really hindering a smooth seamless user experience, and was something that should really be improved upon. The more it disrupted their shopping experience, the higher it would be ranked.

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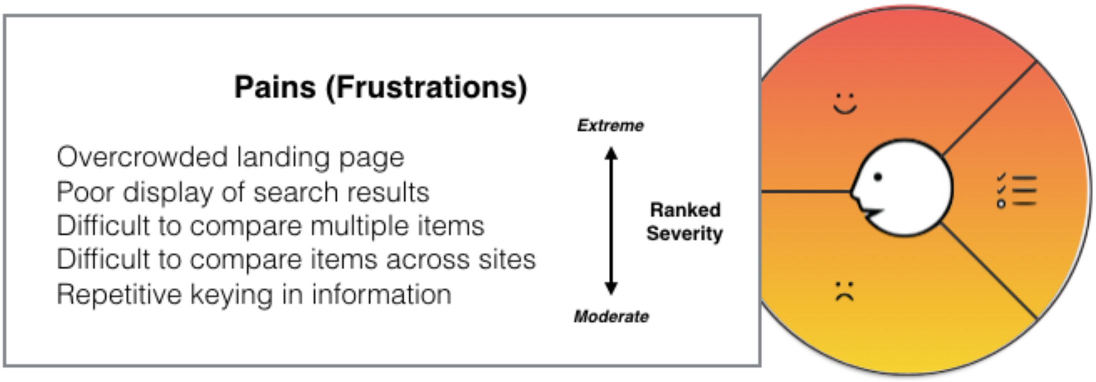
Figure 4.3.3 - Ranked Pain Points (WEBSITES)



The first page that users land on when visiting a retail site plays a very important role, as they say first impression counts. Whether a site has come up with a suitable layout design and balances amount of information displayed with the simplicity of the page, this strongly influences the way users react to the site. Thus explaining why an overcrowded landing page becomes the top frustrations for users.

> ***C**: "PCHome I don't like because its really messy and I don't like the interface. Momoshop I've used, but Taobao is too messy and you need a separate account."*

> ***H**: "Most websites have done a good job but for like Yahoo sometimes the various site links are all over the place, and unclear if the offers are for Auctions or Retail etc."*

The other frustrations such as poor display of search results, and the difficulty involved in doing comparisons are somewhat similar with those experienced on a mobile app. Then at the bottom of the list is the need for users to key in repetitive information every time they are making a purchase.

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If we put them side-by-side, we clearly see the list is much longer on the left side of *Figure 4.3.4* for mobile. They both have different "Pains" independent of each other, but some occur in varying degrees on both platform types. When using mobile apps, it is almost impossible to do comparisons, in contrast when using websites users can open multiple browser windows to compare items although it is also just an out of the box way to do comparisons. It makes it possible but the difficulty in doing it still makes it a pain point.

Figure 4.3.4 – Comparing Pains (Mobile Apps Vs. Websites)

Pains (Mobile Apps)	**Pains (Websites)**	***Extreme***
Limited items displayed on screen	Overcrowded landing page	↑
Cannot compare items across sites	Poor display of search results	
Cannot compare multiple items	Difficult to compare multiple items	
Tough to navigate within app	Difficult to compare items across sites	
Poor user interface design	Repetitive keying in information	
Poor display of search results		
Poor display of detailed information		↓
Lack of 3rd-party Payment options		
Lack of delivery options		***Moderate***

Still when asked to summarize their overall experience with using current mobile apps or websites, our interviewees felt that it was a generally good experience. There will definitely be many areas that can be improved, one being the general user interface (UI) or user experience (UX) of local apps or websites as highlighted by one of our interviewees.

> ***L**: "So far everything is fine, but in general the UI for many Taiwanese sites still fall behind international ones like Amazon - then the overall experience just falls short."*

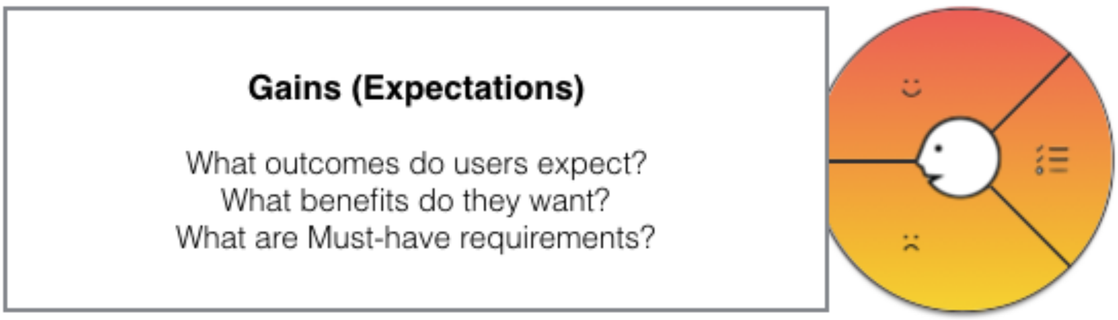
doi:10.6342/NTU201702039

The pain points mentioned for both platforms are definitely concerns for the online shopping industry here in Taiwan, but more importantly it gives us certain insights as to why websites are still the current choice for a large proportion of local consumers.

4.4 Customer Profile - Finding Customer Gains

The last and final piece of the Customer Profile is the expectations or "Gains" that consumers have when they use online shopping platforms. Some of these may be labeled as required gains where consumers find they are a necessity i.e. 'Must-have', whilst others may be expected gains where they would feel more like 'nice-to-haves'.

Figure 4.4.1 - Third Component of Customer Profile



For this section, we really wanted to find out what were the expectations when shopping online, and how they would benefit from stated features or functions.

> ***Y**: "Mmmm, Filters - Price filters or other types of filters. Categories! Items must be well categorized. This will help me to find what I want easily and quickly. Also must be clear in the details of delivery, for example Momoshop will state the expected time you have to wait to receive the item."*

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> ***C**: "Search must be accurate, recommended items after the search must be related or items that I might be interested to purchase too. Search results must show some basic details so I can decide if I am interested, instead of making me click an item to see even the most basic details. If I don't have to click into each item to view the basic details, I can already do comparisons while viewing the search results displayed. Filtering or sorting functions are important too."*

Again it was noted that the some interviewees highlighted more points related to the search and comparison phase of the shopping. For them, online shopping is focused on finding items easily, comparing details and prices and at the end finding the most value for money option.

Other comments were more comprehensive of the entire user journey while shopping for an item. From browsing, to search and recommendations, viewing item details, reading up on the item reviews and finally to registering an account, the checkout and payment process.

> ***L**: "Make browsing simpler, categorizing must be very accurate & the overall user experience must be comfortable. Reviews & comments must be allowed so I know the quality of the product I'm buying. Registering for the platform must be easy, and paying for items must be quick and simple."*

Even so, one major point was brought up in all our conversations - Trust. With numerous cases of credit card fraud or people stealing information, security and safety becomes a major consideration for online shoppers. Our interviewees had two major

doi:10.6342/NTU201702039

causes of concerns (1) Do you trust the quality of the product and (2) do you trust the security of the payment?

> ***Y**: "Trust - sometimes I don't trust the quality of products on a platform - for instance Taobao, some products are imitations and poor quality."*
>
> ***C**: "Reviews on seller or products and rating systems are important - so that I know who to trust. The product quality must be good."*
>
> ***H**: "Reviews & ratings - very important for trust. Safety for payment."*

Besides the issue of trust, the general consensus garnered from all our interviewees was that they wanted to buy quality products through more accurate search and reviews, be assured of a strong payment security and have an overall easier task navigating while shopping.

Though these functions aren't revolutionary in today's digital age, it is reflective of how we are often bombarded by so much information sometimes there is an overload of news, offers and promotions. Consumers that feel there are too many options and there is an information overload would seek solutions that allowed them to filter and sort through the different sources of information easily.

The resulting expectations are mapped along side parts of the user journey where they belong and can be summarized in *Figure 4.4.2* below. Here the user journey also represents some of the tasks or "Jobs" consumers were trying to achieve when they choose to do online shopping and we can see how the expectations or "Gains" match up to them.

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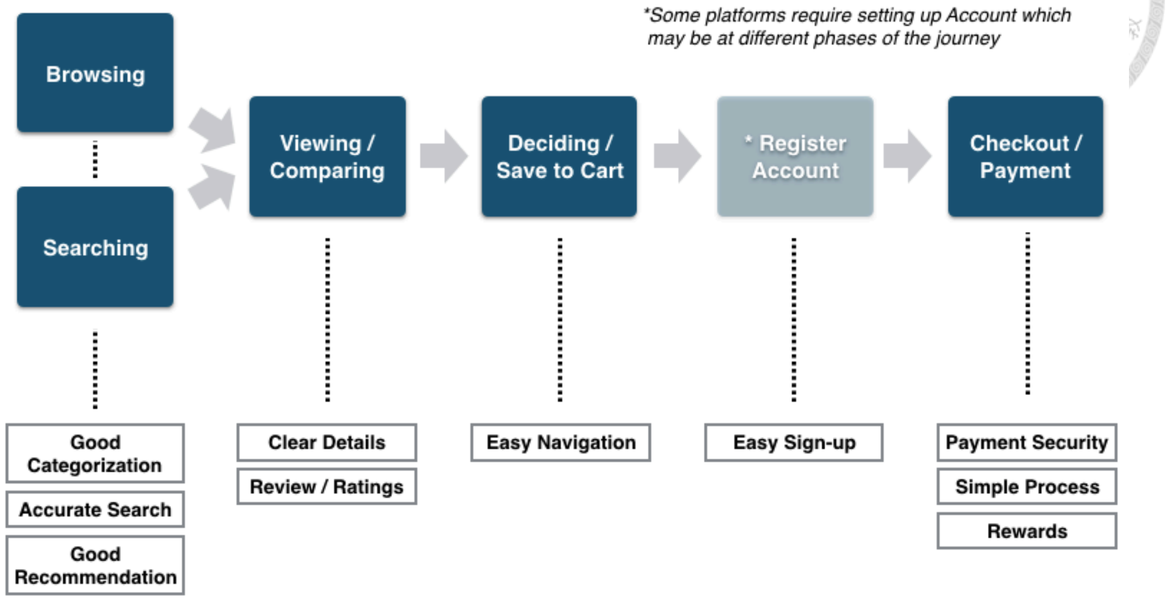
Figure 4.4.2 – User Journey & Expectations



Each step of the user journey shows some of the expectations that they have, and it helps us to see how users feel about each part of the journey. At the same time, we then put together the list of "Gains" according to the level of priority or ranking that our respondents indicated.

Figure 4.4.3 – Ranked Customer Gains Section

According to the interviewees, the quality of the products available or being assured of trustworthy sellers tops the chart. Nobody wants to be browsing and searching online to

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keep running into scams and fake goods. The requests for product review and seller ratings are but tools with which the users are able to discern for themselves if the items they are keen on purchasing are really what they see on photos.

The second ranked item was the security of their personal information or secure transactions. Even though this item was only mentioned by interviewees after they talked about products and browsing, they explained that this was just a really basic requirement that they didn't think about at the start.

> ***H**: "If you can't trust the site to keep your information safe, why would you even want to shop there? They all need better payment security and protection for consumers against fraud etc. many older folks are being tricked etc."*

Coincidentally the next couple of items ranked highly by our interviewees also corresponded to the first two phases of the user journey – the search and browse, followed by the comparison stage. They expected the search logarithms to return accurate results and recommendations, speeding up the time needed to find items with clever filtering functions, and also the ability to make comparisons easily – perhaps something that no app or site has managed to nail so far, but we will look into this in the following section.

The way products are categorized will also determine how a user has to navigate through the pages, and users hope to benefit with an easier time using the platform. This is followed by the simplicity in the way information is displayed and also the ease at which users can make a purchase.

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Some of the "nice-to-haves" include a simple sign up process if needed, as some platforms require you to have an account to use it. Although this is not so much of a hassle these days as many allow 3rd-party integration such as signing up using your Facebook account or your Google account. Our interviewees also mentioned good customer service that is available when you want it, and reward points as possibly some great new benefits online platforms can provide for consumers.

> ***Y***: *"Customer chat? I think some websites have it and even though I may not use it too often but I think it will be a nice to have when you really need to ask something you don't have to write emails and wait for replies."*

> ***L***: *"VIP or Birthday Reward Points that could be used across various sites - such a user experience would be cool."*

All in all, we wouldn't say this list of expectations are too much, customers are really looking for features, functions that would lead to benefits in terms of Usefulness and Ease of Use. Both studies from Childers and O'Cass have touched upon these 2 building blocks to ascertain technology adoption by consumers; here we have just taken a different approach in finding out what are the bits and pieces that matter to consumers.

Having taken you through Customer Jobs, Pain Points as well as Customer Gains, we now can proceed to place all three components of the Customer Profile on the same page. In the figure below is a clearer picture of how it all fits together.

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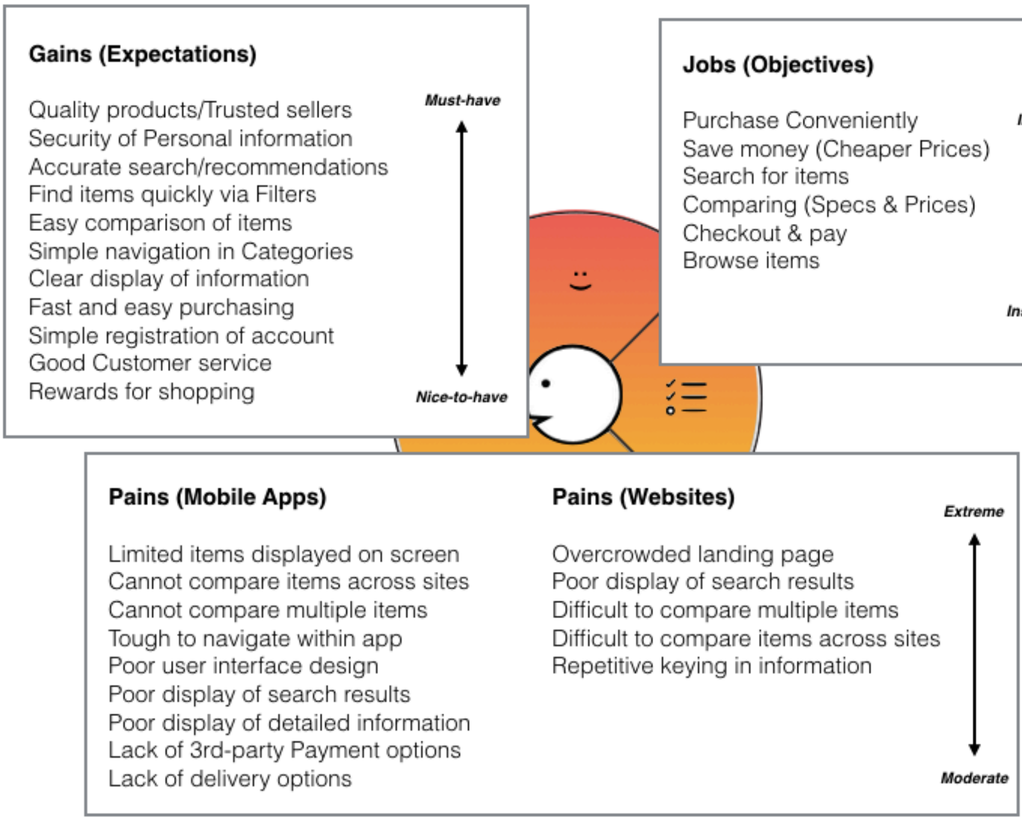
Figure 4.4.4 – Completed Customer Profile for Online Shopping



A consumer's objectives and expectations are derived from their desire to utilize online shopping to purchase goods, thus we are considering them to be identical for both platforms. However, here we have chosen to present both sets of frustrations - those while using apps and those while carrying out online shopping via websites, so as to make it easier for you to see how the Pain points can be attributed to the platform in question. Here we also note how some Pains occur in both sides but in varying degrees. In Mobile Apps, users felt they were unable to carry out any comparisons, whilst in Websites they felt it was difficult to do them.

In the next section, we will examine the value that each platform is able to bring to the market and subsequently when matching Value Map to Customer Profile we will also consider each platform independently.

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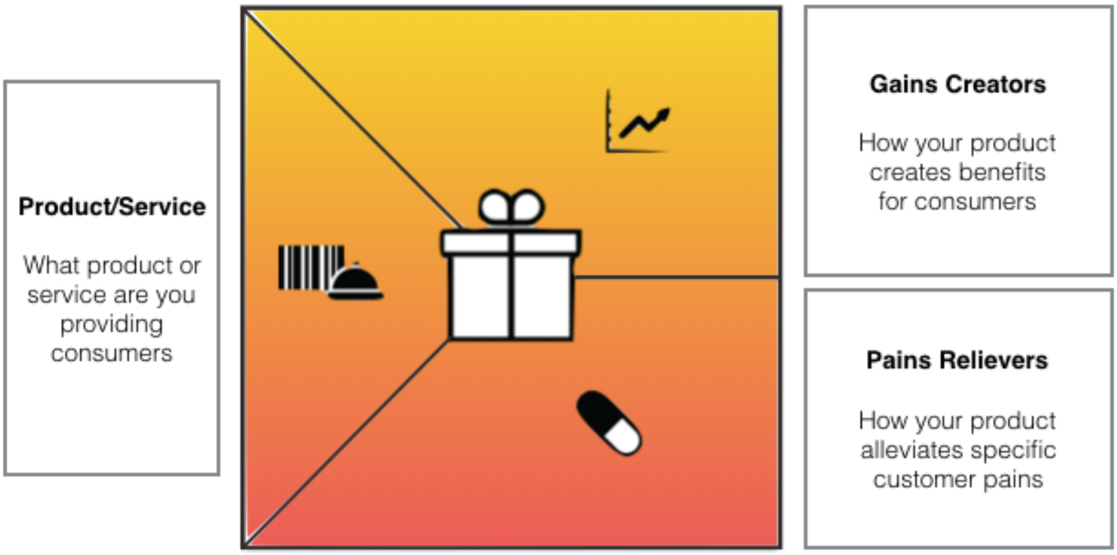
4.5 Approaching The Value Map

We started our study with an understanding that online platforms needed to use a customer-inspired approach to tailor or build their product. The product or service itself is not going to create value for consumers. The solution provided has to match the consumers' expectations, relieve their pains and satisfy their needs in order to really create value (A. Osterwalder et al., 2014).

The Value Map consists of 3 main components as shown below:

Figure 4.5.1 – Main Components of Value Map



Here we will use two real cases to help us assess how mobile apps and websites are faring in terms of creating value for consumers. Accordingly, the remainder of this chapter will be analyzed based these two cases to come up with a separate Value Map for each of them.

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4.6 Selecting Our Cases to Examine

The figure below summarizes some of the retail platforms commonly used by our interviewees. Aside from the obvious big names, other sites commonly mentioned were the Yahoo Auction and Retail sites, as well as marketplace apps Shopee and Carousell.

Figure 4.3.2 – Internet Retail Sites/Apps used by Interviewees

The Taiwan market has plenty of popular retail sites, including local ones such as PCHome, Momoshop and Rakuten (*SP Ecommerce, 2015*). Market Intelligence & Consulting Institute (MIC), a Taipei-based global ICT industry research organization, also conducted a survey earlier this year to evaluate consumer-shopping habits. According to that survey, the three most popular online retailers in Taiwan are Yahoo Taiwan, PCHome and Momoshop (M. Lubin, 2017). PCHome and Momoshop were also the two main sites that our interviewees talked about, indicating these sites did have a higher mindshare or top-of-mind brand recall for Taiwanese online shoppers.

Momoshop is the shopping website of parent company Momo that also operates in TV shopping and Catalogue Shopping. According to publicly available financial statements

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total revenue for Momo grew 9.5% in 2016 to NT$280.8 billion, making it still the largest e-commerce company in Taiwan (P. He, 2017). Putting aside revenues from TV and Catalogue shopping, Momoshop posted the highest revenue growth in 2016. Whilst its' total revenue of NT$205.8 billion fell short of PCHome's NT$257.4 billion, but it clocked a growth of 20% as compared to PCHome which had a 12.5% growth. Even though Momoshop is smaller in scale it has shown a higher growth rate than PCHome. Thus for our website case, we will examine the functions and features of Momoshop to fill out our Value Map.

As for the mobile app scene in Taiwan, several retail platforms have developed mobile applications versions of their shop, but when we asked our interviewees they mainly focused on C2C marketplace apps such as Carousell and Shopee.

Both apps were founded in Singapore but have since officially launched apps across South-East Asia and shown incredible growth. Carousell was earlier to the scene here in Taiwan, launching in 2014 with much excitement. Two years after its launch in Taiwan, there are over 10 million product listings put up by its active members, making its Taiwan operations the second largest after Singapore (The China Post, 2016). Shopee on the other hand, has only been in Taiwan since the middle of 2015, but it has aggressively tried to draw the crowds by using a free delivery model. With the free delivery model launched at the end of 2015, gross orders and also users increased tremendously (Lisa, 2016). Their growth hacking strategy had definitely been successful, with app downloads and app store rankings now outpacing Carousell. However, Shopee has not disclosed details of the free delivery deal that it has struck with convenience stores and logistics services, but the amount of cash drain may be

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insane. Also this strategy aims at bargain hunters, and does not encourage loyalty. This will be tested soon, as Shopee has just recently announced that they will start charging for deliveries, putting an end to the insane cash outflow that helped it attract 8 million registered users and more than 2,000 individual sellers. (L. Lauly, 2017)

Thus instead of considering the "rapid-expansion" Shopee, we will use the more down to earth Carousell, which has focused on creating a community-based market experience, as our mobile app case in completing the value map.

4.7 Momoshop - Pain Relievers

1. Faster and easier search. The website has a search bar that resides permanently at the top of the page. In fact they built it as a floating bar at the top of the page, so even if you have scrolled down to view many items you don't have to return to the top of the page before carrying out another search. Momoshop's search bar also allows users to pre-select a category – giving users the option to first determine how to narrow down their search. Simplifying and speeding up the search process.

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2. Faster navigation while browsing thanks to well-categorized products. Momoshop sells many products, and these are sorted into multiple main and sub-categories. The black category bar resides on every page and provides users a quick way to navigate between categories and browse items. When you roll your mouse over the top of the bar, each category will also present the sub-categories as well as some recommended brands.

3. Instead of a landing page cluttered with items, Momoshop has a landing page that is nicely laid out. Clearly specified areas for different types of promotions and highlights are shown instead of the actual product listings.

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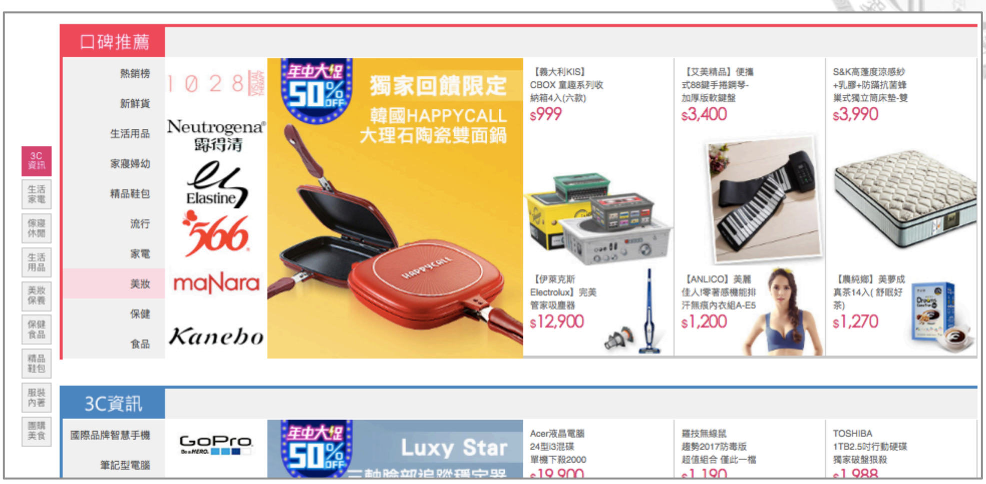
It also makes use of clever user interface showing categorical promotions and quick tabs for recommended brands.



4. Easy and simple login to user account, as Momoshop allows you to save username and password for future login or directly link to other accounts and use them to login the next time you come back to the site.

5. Saved information also allows for faster checkout and removes the need for users to retype personal information every time they are making a purchase.

6. Overall navigation throughout the site has been well thought out and users have many shortcuts and links to take them from page to page. Making the overall user experience easy while going through the different stages of the purchase journey.

As a recap, these are the "Pain Relievers" that we have identified:

1. Faster & easier to use search bar
2. Well-categorized products
3. Well laid-out landing page
4. Easy and simple login
5. Saved personal information
6. Easy navigation

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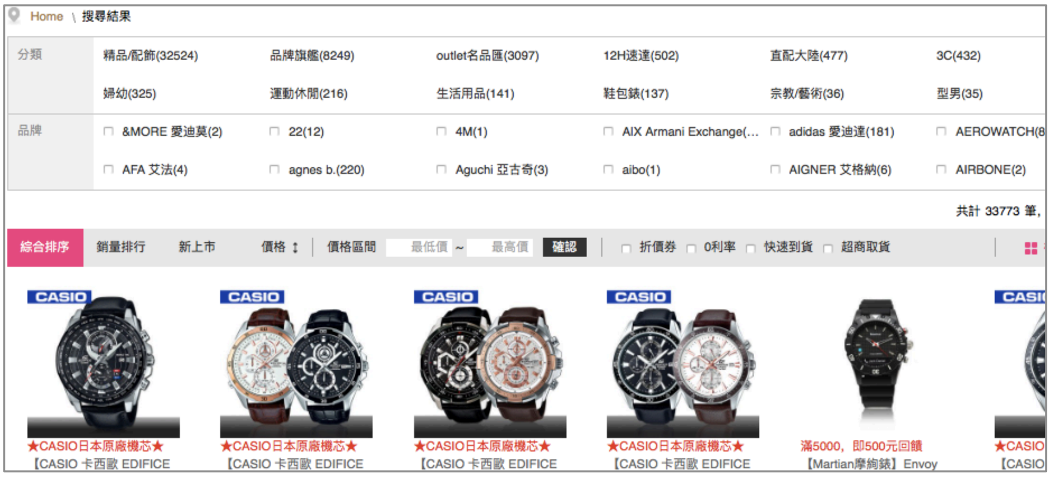
4.8 Momoshop - Gain Creators

1. Search filters and sorting options. After performing a search, users can narrow down results by selecting sorting criteria, as well as filters that assist in finding items. This is really important as Momoshop has such a large array of items available that even after searching you will be provided too many matches. Users can select based on product brand or style.



2. More recommendations to users, especially products they may not have considered. The site has various rotating banners that showcase recent items other users have purchased, limited time-based offers, express-delivery offers or the top-selling items of each category.

3. Multiple payment methods and collaborations with credit card companies. Providing various options for users means they get to choose how they want to pay and also attractive offers regardless of what credit card they are using.

4. Detailed information on product details, specification, returns & exchange policy. Users have all the information that they are seeking in easy to access tabs while viewing an item.

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5. Smart recommendations based on item you are viewing. With a section that shows what other users had also purchased while also browsing the item, users can find similar or comparable items that you might be interested in.

6. Fast access to previously viewed items or save items for later. Momoshop gives you a quick glance of recently viewed items or if users want to bookmark items for further consideration they can add them to a saved list.

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7. Good post-purchase customer service. There is an item-tracking page with details and updates, as well as direct customer feedback or enquiries form.

8. Rewards and incentives for new and regular shoppers.

9. Payment safety is also carefully handled. Each individual's payment card can only be linked to one account, so the cardholder name must match with the user name of the account.

As a recap, these are the "Gain Creators" that we have identified:

1. Search filters and sorting options
2. More item recommendations
3. Multiple payment methods
4. Detailed display of information
5. Smart recommendations
6. Recent views & saved list
7. Good customer service
8. Rewards for shopping
9. Payment card safety

4.9 The Momoshop Value Map

Having identified both "Pain Relievers" and "Gain Creators", the next challenge was to rank them in order of importance. Here we assumed the role of the firm in order to determine how each item should be ranked. For the "Pain Relievers", we needed to ask how intense was the pain that our solution addressed and if that pain was something that occurred often while our customers were using our product. This way, we would be able to rank the solutions in terms of importance. For the "Gain Creators", we needed to ask

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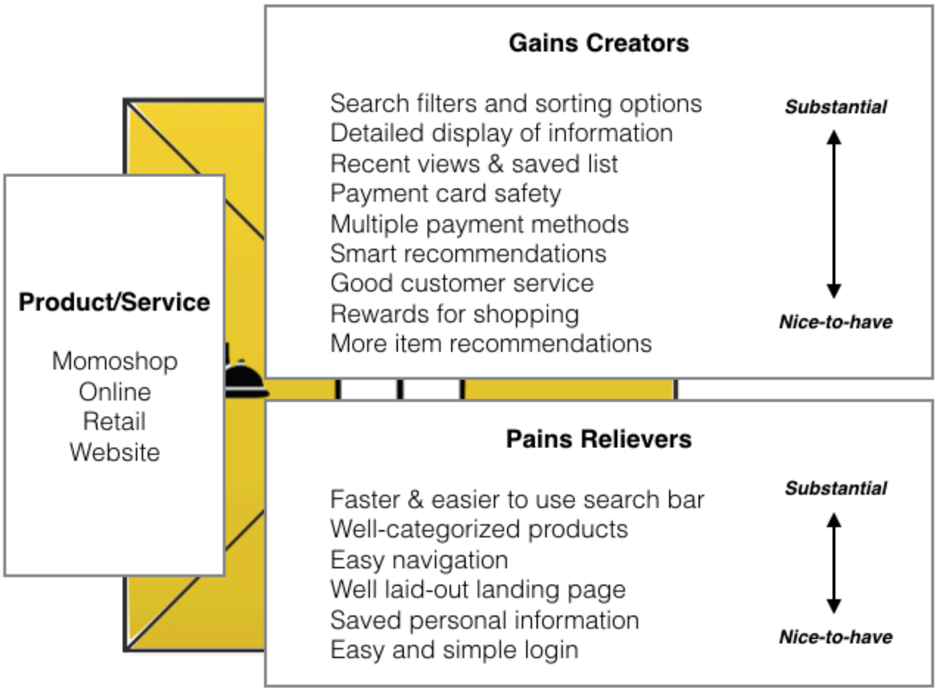
how relevant each gain was to our consumers, and if they were substantial or just nice-to-have. *Figure 4.9.1* shows the ranked Value Map for Momoshop.

Figure 4.9.1 – Completed and ranked Value Map (Momoshop)



Our "Gain Creators" are focused firstly on providing consumers more satisfaction when browsing, searching and viewing items. This is then followed by the assurance of safety and payment options. Item recommendations, customer service and rewards we feel are less crucial to consumers when they are using the platform.

Our "Pain Relievers" are primarily tackling the otherwise horrid time users would have trying to find an item in the mass variety of available merchandise. The search bar's functionality and design is the most important, followed by the categorization and overall navigation of the site. We feel that the landing page may be something users can overlook if we managed to give them the easy ways to find what they are looking for and if the navigation of the site is well managed. In terms of retyping information, it is

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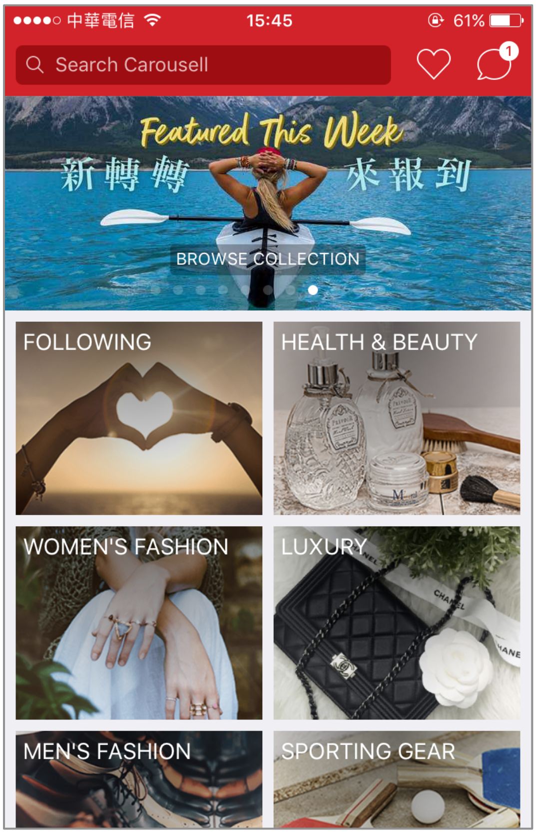
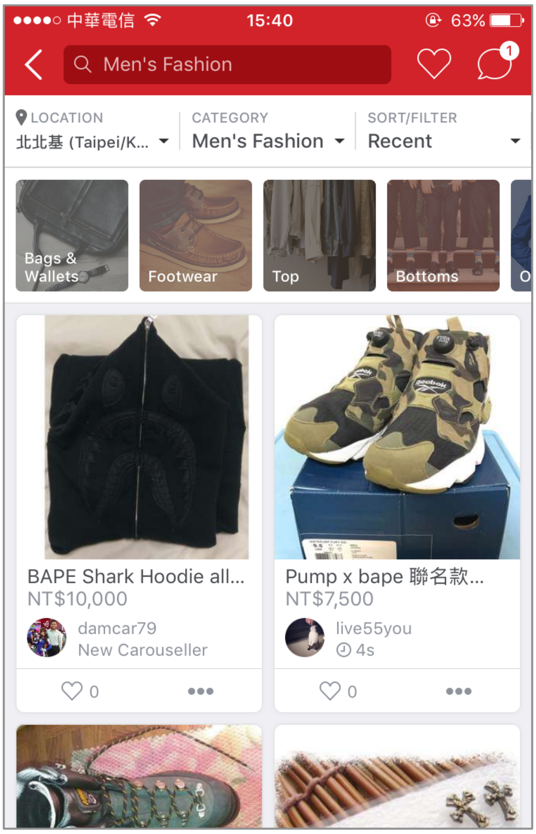
much more troublesome to key in all the purchasing and delivery information as compared to login process, thus their ranking as shown.

4.10 Carousell - Pain Relievers

1. Faster and easier search via the apps' dedicated Search bar. The search bar sits at the top of the app and allows users to quickly perform a search anytime while they are using the app. This means users don't have to keep returning to the main page to look for items.

2. Well-defined product categories make browsing easier for users. Products are clearly segregated by major product-type or targeted audience categories and then also by sub-categories.





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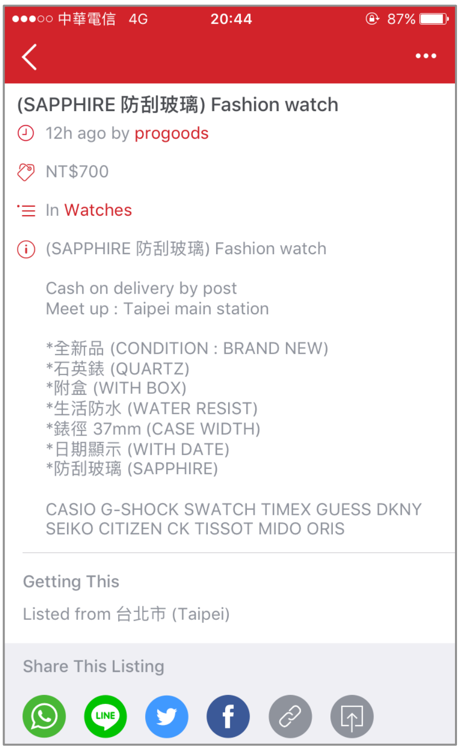
3. A Single page scrolling User Interface removes the need to click through pages. Thus allowing for a simpler navigation throughout the app.

4. Easy to see item details at first glance. By using a fixed display layout that clearly shows images of item, item details, and price users don’t need to tap through many pages to see essential item information.



5. Constant login session. Unless a user chooses to sign out, the app will keep the user logged in so that they don’t have to keep signing in every time they open up the app.

As a recap, these are the “Pain Relievers” that we have identified:

1. Faster & easier search
2. Well-categorized products
3. Single page scrolling
4. Easy to see item details
5. Constant login session

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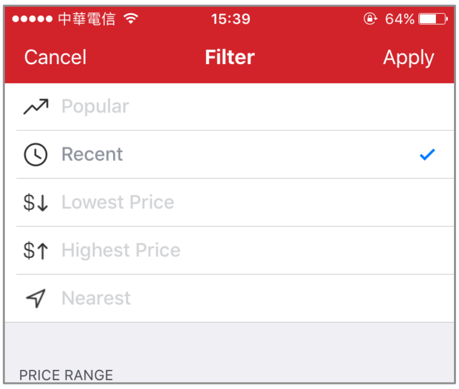
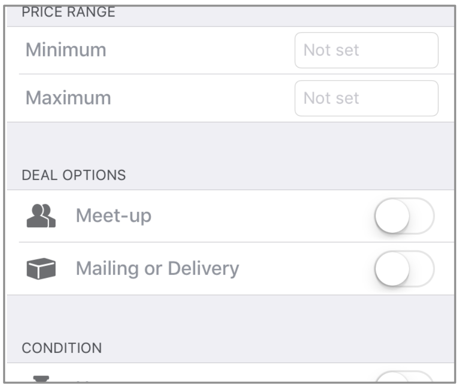
4.11 Carousell – Gain Creators

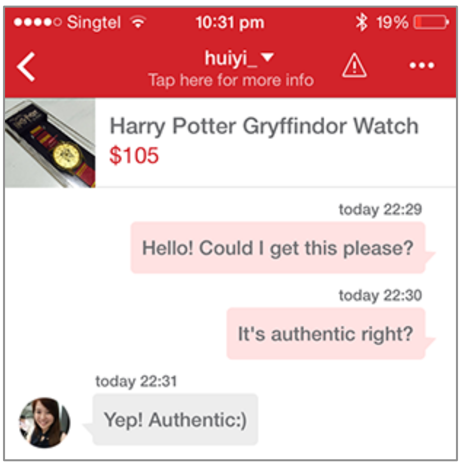
1. Sorting and Filters provide a quick and simple way to fine-tune your search, allowing users to find items much faster. They can select a price range or choose to list search results based on various criteria. For Carousell they also included options on how the item will be collected, or the condition of the item users are purchasing.

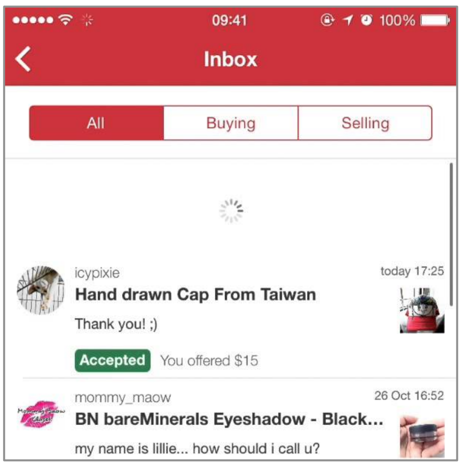




2. Accurate geographical boundaries allows users to set a location or search radius, thus narrowing search results to a particular location in Taiwan. This is extremely useful for a country like Taiwan where people may be situated in different cities.

3. Direct instant chat function allows users to skip emails and messaging apps when there are queries. Now there can be an easy and direct communication channel between the sellers and buyers.





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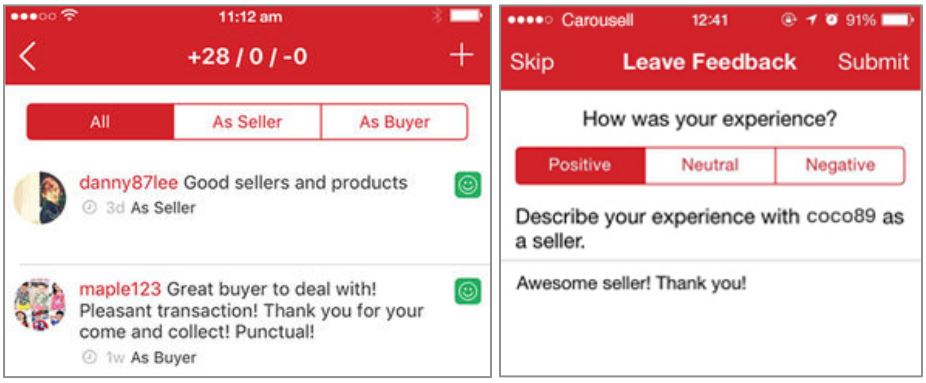
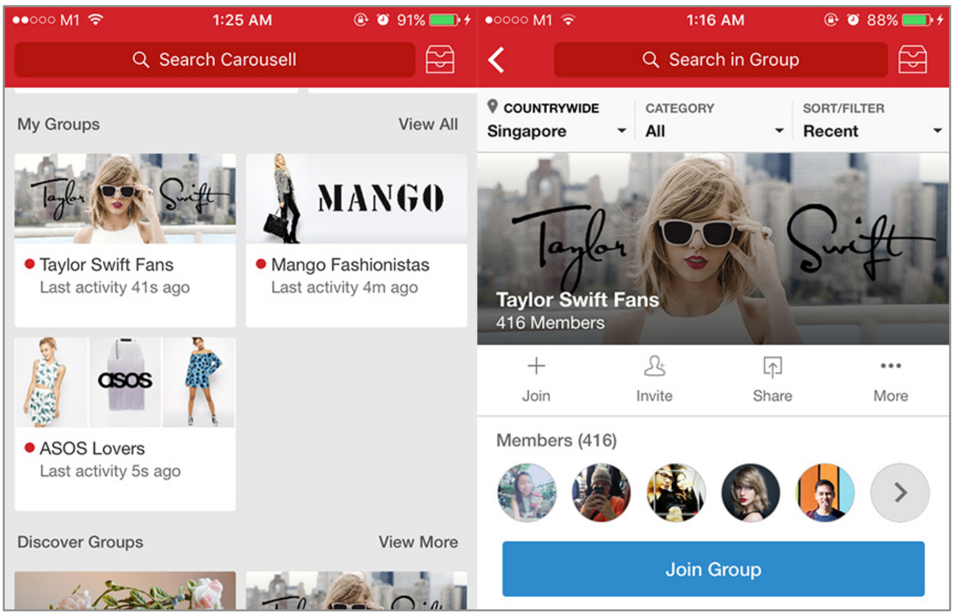
4. One-click buy. Users have a simple and speedy way to make an offer for a product or place an order when viewing products.

5. Buyer & Seller ratings give users assurance and builds trust. Now users can give positive or negative feedback about a particular purchase they made, and this will help other buyers be aware of the quality of product or the seller.



6. More item recommendation. Users are presented with various promotions and recommended sellers every time they access the app and while using the app.

7. Groups are smaller networks within the app that allows users to connect and transact with people of similar likes or interests.



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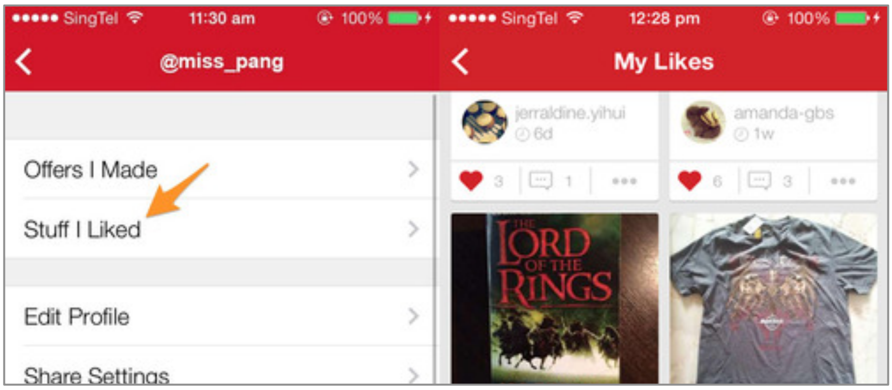
8. Quick and easy setup means it is easy to start a Carousell account and begin shopping, it also encourages a larger community and more available items.

9. Quick share functions means it is easy to connect with other social networking sites/apps, allowing users to involve their family or friends in the shopping journey.

10. Good customer service with dedicated page for help and FAQ, as well as direct email for support or feedback issues.

11. Fast access to previously bookmarked items. With a "Likes" function, users can easily add items to a list, where they can then go back to view later on.



As a recap, these are the "Gain Creators" that we have identified:

1. Search filters and sorting options
2. Accurate geographical boundaries
3. Direct instant chat
4. One-click buy
5. Buyer & Seller ratings
6. Item recommendations
7. Group networks
8. Quick easy setup
9. Social sharing
10. Good customer service
11. Saved favorites

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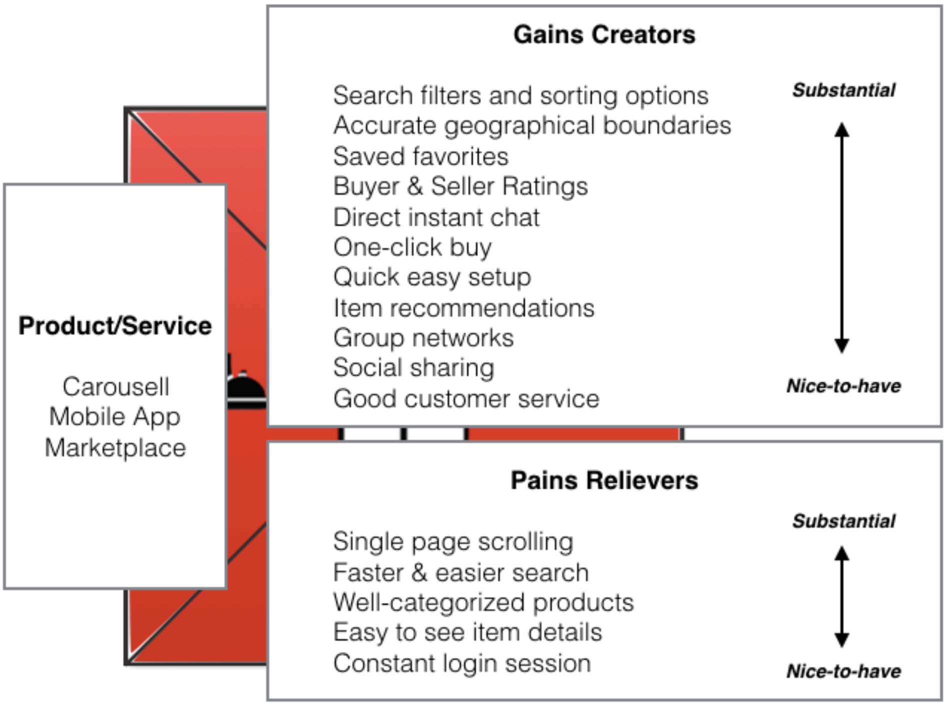
4.12 The Carousell Value Map

Again assuming the role of the Carousell, allowed us to ask questions that would help determine the ranking of the stated "Pain Relievers" and "Gain Creators".

Figure 4.12.1 - Completed and ranked Value Map (Carousell)



In terms of the solutions, single page scrolling creates a smooth browsing experience for users and they no longer have to click next page or previous page. This together with the ability to search quickly and view well-categorized products tops the list.

As for Gains, the ability to obtain better search results, and "bookmark" items while browsing make up the top 3 on the list. Then comes the next part when users are trying to ascertain the trustworthiness of the seller and also ask questions using the chat and also making an order. Having an easy set up process and item recommendations are some things that goes unnoticed but still is important. The group feature and sharing

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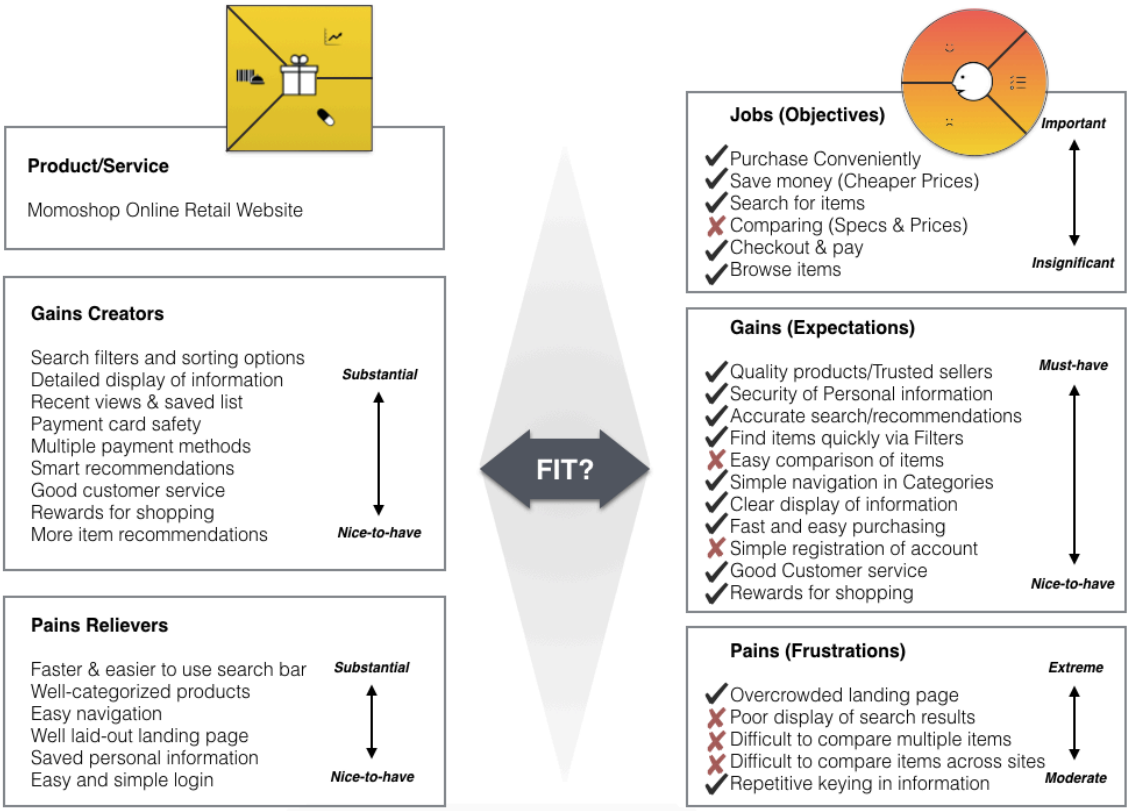
functions might hardly be missed if we removed them from the app. Lastly is customer service which unless users really experience any issues they would not need it.

4.13 The Resulting Matchup

Having completed both Value Map and Customer Profile, we now put them together to see how they matchup or "Fit". Products achieve "Fit" by addressing important jobs, alleviating pains and creating gains that customers care about. First let us examine the "Fit" for Momoshop and our Customer Profile for Websites.

Figure 4.13.1 – Value Customer Fit (Momoshop)



In terms of "Jobs", Momoshop allows a user to achieve all of their goals except comparing. Being able to cater to the various tasks the user would like to undertake while using the site means it will be more likely able to retain customers. Also as

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understood from our interviewees, comparisons can still be carried out with external methods such as opening multiple browser windows or tabs to view and compare items. Thus making it something users can choose to overlook while using the website.
As for "Gains", they haven't created any obvious way to assure consumers regarding quality but the brand has definitely won some consumer trust such that it feels that it doesn't need quality assurance features within the website. Other important expectations such as payment security, finding items quickly and easily, as well as recommendations were all covered with the features that Momoshop had built into the website. They also managed to provide simpler ways to navigate between categories and viewing detailed product information through the use of clever UI design. The selection of payment method, keying in payment information and delivery details are also all designed to fit in one single page making the checkout process faster. They also provide customer service and rewards that users think are nice-to-haves. The only other areas where they have failed to provide are the simple registration of account and easy comparison of items. The registration process is still a hassle and while you can login using third party accounts, the initial setup is still required.

For "Pains", the website has managed to avoid the pain of an overcrowded landing page, choosing to focus design attention on creating a clear layout with specific promotional and categorical areas. Some of the other "Pain Relievers" that Momoshop has built into the site have actually becomes a basic requirement for consumers, so much so that they don't realize that the search bar, well-categorized products and easy navigation are actually alleviating the pain of rummaging through the site to get something they are looking for. By allowing users to save their personal data, they removed the need to retype with each purchase. On the flip side, even though they have

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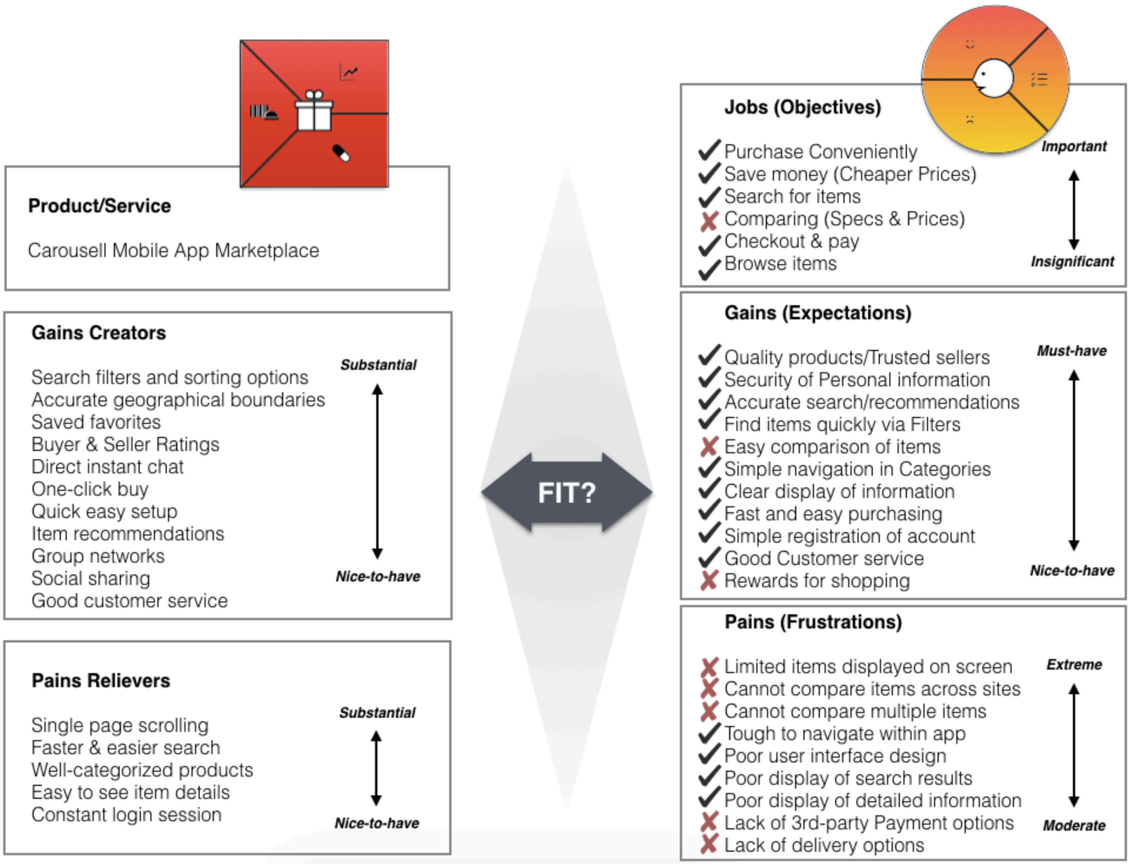
filters and sorting options to allow users to fine-tune their search, the way search results are displayed remains something that can be improved. Alas the lack of comparison features again is something that means they fail to alleviate some of user's pains.

To summarize, Momoshop has managed to address all of the important "Jobs" and satisfies most of the "Gains" that consumers expect. They have some shortcomings in alleviating the "Pains" but they do not hinder the user experience too much for consumers. Thus we could say that Momoshop has achieved a rather good "Fit".

Now we move on to examine the "Fit" for Carousell and our Customer Profile for apps.

Figure 4.13.2 – Value Customer Fit (Carousell)



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Similarly for "Jobs", Carousell only fails to deliver in the aspect of comparing. The difference here is that consumers are not able to easily conquer this shortcoming on the mobile device, they can't jump between browser windows or tabs, making it a more glaring issue than when compared to the website experience.

For "Gains", Carousell's marketplace design means users make their own transfer of payment and there is no issue with payment security within the app, also being able to see ratings, and directly seek clarifications with the chat feature means consumers are more assured about the quality of the product and the party they are dealing with. Their sorting and filters provide users a smooth fast experience trying to narrow down their search for something. They also provide recommendations of items or collections that may be of interest to users. Carousell has also made the purchasing a simple and fast process with their One-click buy. The sorting of categories have also managed to somewhat fulfill user expectations for navigation within the app. Registration is quick, and customer service is easily available. Thus the only missing expectations are comparison of items and rewards for shopping.

For "Pains", the app utilizes a single page scrolling design thus eliminating the pain of clicking through pages; however, we feel this only alleviates the pain of using the mobile app slightly. Yes users do can scroll through a single page to browse items easily but it still does not negate the fact that a user can only see 4-6 items at once. Thus it still fails to address consumer's largest pain point. Couple that with the previously mentioned lack of comparison features and immediately we have the first few pain points unsolved.

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The app does however do a good job in the search functionality, the easy navigation thanks to its User Interface and categorization, as well as how it displays information about products. Lastly, due to it being a marketplace Carousell also fails to offer third-party payment options or delivery, as those are self-negotiated between buyer and seller.

To summarize, Carousell has managed to address all of the important "Jobs" but where websites have saving grace thanks to users finding their own solution to comparing, mobile apps are unable to provide that. The overall experience for Carousell has managed to cover most of the expectations of consumers, and even include additional features that users were not even considering. However the biggest "Mis-Fit" comes in the "Pains" section where the limitations of the mobile app are not carefully addressed. We could say that Carousell has managed to craft a smooth and user-friendly shopping app experience but lacks the right ingredients to make it a more valuable platform than retail websites. This could be the reason why Taiwanese consumers who place a large emphasis on comparisons have yet to abandon website shopping for mobile apps.

4.14 Additional Interview Insights

Our interviews not only provided answers for our Value Proposition Canvas, but also additional insights on how consumers felt about online shopping. Interviewees were asked whether they still went to Brick-and-Mortar stores after having been introduced to online shopping. A mix bag of answers were obtained but everyone felt that for items such as clothing, they still preferred to try them on for size and sometimes the actual stores were indispensable.

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C: "For buying shoes and clothes, I still prefer to go to try the size, even if online shops provide the measurement charts, this way I can really be sure of the fitting, unless it is something I really like. I know some people will try at the store and then buy online, but I don't do that.

Y: "I would still go to the store, especially for more expensive items or for clothing. Since it is important to try on the size at the shop. If purchasing from overseas then I have no choice"

There were also other comments that offered a slightly different take about the trying on size at the physical stores.

L: "I am confident of the sizes especially when I have done sufficient homework and purchased online previously. When you read the reviews and do enough homework then you don't really need the physical store where you can try the size anymore, you're confident of being a frequent shopper online and you will know the quality and size you will get online. But I still enjoy the experience of walking around the physical stores."

Our interviewees were fairly frequent shoppers, buying online regularly at least once or twice a month. It was possible that consumers were increasing their online shopping frequency with the increase in available products being sold online.

Y: "Some things that I can't find elsewhere, for example a hair care shampoo that you can't find in Taiwan, Bluetooth earpiece, clothes and other small items. Recently bought a swimsuit thanks to Facebook Ads"

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__L__: "I get some cooking ingredients or utensils or tools that are very specific and it is sometimes difficult to go out and look for it. I browse many online catalogues for clothes, and household stuff."

__H__: "I can find almost anything online now, so I guess if I am looking for something I could just buy it online, even toilet rolls. I don't have a fixed pattern. Some things are cheaper in the actual store so I won't buy them online. But mostly I purchase small items. Unless is something for the home"

Each person had different habits based on their backgrounds, but a common point was that shopping online was no longer constrained to apparel, it now encompassed things ranging from household items, kitchen or daily necessities, to digital electronics. Different online stores sell different items and the availability of products is also reflective of the earlier point on consumers having an easier job searching for something online and purchasing it.

In Taiwan, various delivery and payment options are available and with a strong network of infrastructure in place, it has helped push the online retail industry forward. Not surprising that payment by credit cards were the go-to option, but we realized that choosing to collect their purchases at either a 7-eleven or Family Mart was highly correlated to the convenience factor.

__C__: "I am often not at home, so one of the things I always look out for when purchasing is the delivery options. For me collection and payment at the convenience store is the best, if they deliver to my house then I always have to re-arrange another time to collect."

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The pain points mentioned for both platforms are definitely concerns for the online shopping industry here in Taiwan, but more importantly it gives us certain ideas as to why websites are still the current choice for a large proportion of local consumers. Our respondents echoed these sentiments, saying that their preferred choice would be websites and were adamant that they wouldn't change their preferences in the near future. This however was mainly due to their belief that they would not change their current style of shopping and their shopping habits.

> ***C***: *"No, I think it is still hard to change, I don't like to be doing online shopping in little pockets of time or just randomly browsing phone apps, and people who use mobile apps are usually doing so in little breaks of time, so in the short term don't foresee myself changing."*

> ***Y***: *"No. I don't really like buying 2nd hand stuff so I don't usually browse those mobile apps, and I really like to open many tabs or pages to do comparisons, something you can't do using the mobile app. Using apps I feel is more for impulse buys and clothes - which I prefer to shop at the actual stores."*

> ***L***: *"Not really. Maybe it's hard to imagine change. I will still use mobile apps for browsing like a magazine, but websites are more for actual purchasing"*

Many people are often glued to their connected devices, and the slur of advertising that one is exposed to on a daily basis does make a change to how marketing is carried out today. In fact, one such place is Facebook, where users are daily bombarded by various updates from their peers, brands and groups that they follow. Wondering if Facebook had played any part in influencing our audience, interviewees were asked if social media or their social circle had an effect on their online shopping.

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***L**: "Yes, to some extent, but it depends on what people buy. I buy many things that my friends wouldn't purchase online, so they won't influence me. But while on Facebook I follow individuals who write reviews & articles, and so I do get influenced by them."*

***C**: "Facebook ads often push me stuff that I need or I have bought, or related items so they really have created a lot of my shopping habits. Friends pushing group-purchases will also be an influence. If there are more people buying together it will be cheaper."*

While carrying out the initial study on the industry, we also noticed that online retail is also slowly being transformed from just websites and apps to being integrated into other apps. Back in 2005 social media giant Facebook added a new shop tab function within its app (J. Boorstin, 2015) allowing brands or pages to now include direct shopping via a tab on their pages. This tab becomes a single place for consumers to easily discover, share and purchase products while browsing Facebook. Later on in 2016, Instagram (coincidentally also owned by Facebook) also started rolling out this new feature that allows you to buy what you see in a photo - without ever having to leave its iPhone app (N. Olivarez, 2016). Yet none have managed to create such a storm as WeChat in China. Instead of building standalone apps, its developers now build various services within WeChat. All of the chat app's features are at their fingertips (E. Crouch, 2015) and this allows users to seamlessly make in-app purchases with WeChat's wallet and users will influence each other's purchasing decisions thanks to its social networking.

William Bao, Managing Director of Chinaccelerator, believes that this new direction taken by WeChat embodies the future of online retail: "In WeChat, everything's in one

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place. So it's simply a matter of building a community - around your product or viral content - and then everything that you see in that community you can click and buy" (E. Crouch, 2015). We wanted to explore how feasible it would be, and if such an integrated shopping experience would take off in Taiwan. Thus we asked our interviewees what they thought about having an online shopping marketplace built into the chat app they frequently use - LINE.

> ***Y***: *"Oh that might be quite a cool idea, because some people might not want to download a new app, but if it is embedded in LINE then people can already start using it."*

> ***C***: *"Probably not bad but for me personally I don't use LINE much. It might work, I know WeChat has such a model but it might work only for people who are not used to shopping on a different platform. If they are used to shopping on certain places they might be reluctant to change i.e. high switching costs."*

Both points are valid, it might be able to attract a certain group of new users that otherwise would have been too lazy to start using something new. Having it built into a daily communication app allows them to have much lower risk to take, and can easily try out its functions. On the other hand, consumers who were already avid shoppers might feel there are high switching costs, as they might have been used to a particular system, or have accumulated points or they trust a platform due to all the ratings etc.

When asked on the focus or features such an integrated retail system should encompass, our interviewees pretty much mentioned similar points to the normal shopping platforms. One standout point was that there were plenty of other shopping apps/sites,

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for a new marketplace to work it had to deliver unique value products and not just be a place for 2nd-hand unwanted stuff.

***L**: "In Taiwan now, people can buy new items for really cheap price so they may not want to buy 2nd hand items. So I guess the products that are on sale being more creative or handmade or with their own unique feel might work better."*

***Y**: "Discovery of new items or interesting products, not just cheap items."*

Lastly, some time was given for our interviewees to share their thoughts about the future of online shopping and any final comments that they had. Interestingly, 3 major directions were brought up. The end-to-end experience, smart shopping and the evolving of retail stores. Even though actual retail stores might suffer a little thanks to the availability of online avenues to buy items, the word shopping is still synonymous with experience. Both actual stores and online stores needed to reinvent the experience that it was providing to consumers. Just because they are the seemingly growing market, online stores must not forget that the experience should be an end-to-end one for the customer.

***L**: "Online shopping can also be an experience and that will make a difference to how people view you. Like the packaging, making you feel like you're special - a little card inside or the item packaging. The experience doesn't stop at the purchase - it includes the after sales service and that is important."*

The future is also starting to explore Artificial Intelligence (AI) being embedded into various devices, and we can also expect it to slowly come into play within the online shopping industry.

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***C**: "I think in the future smart shopping will be able to know when I need something, or if I'm running out of something at home and that will be the most convenient. It will also know my previous shopping habits and be able to give new flavors that are similar to what I bought but I've never tried before."*

We will also see the retail stores be it online or offline evolve with the shifting landscape. Actual stores will downsize, become storage & display centric, and some might be re-fitted to include more experiential elements. Whilst online stores might try to include more Augmented Reality (AR) functions as they try to mimic the brick-and-mortar shop experience.

***H**: "In the future, online store will try to include AR making the experience better, and as things move towards more convenience of online shopping, maybe actual stores might become more of warehouse and display experience concept."*

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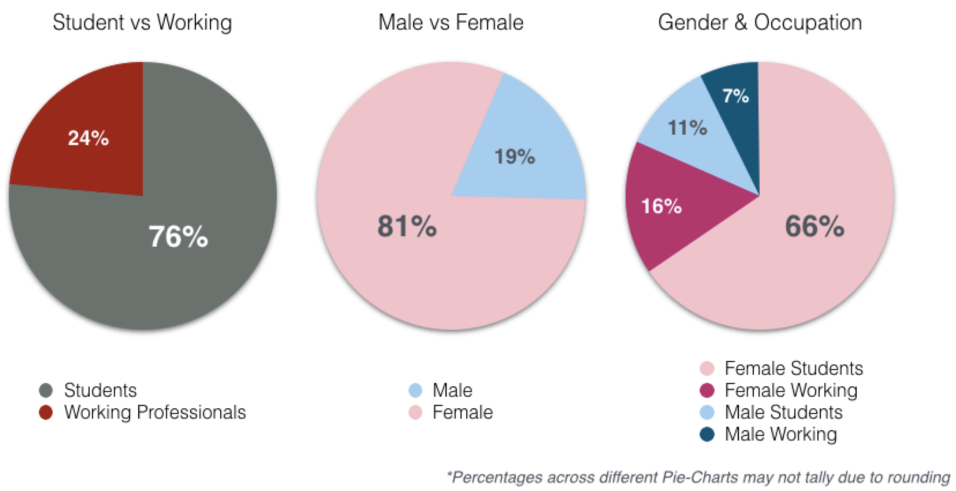
5. CONFIRMING & COMPARING FINDINGS

5.1 Conducting Online Survey

Having arrived here, we wanted to utilize some of the insights that were obtained from the in-depth interviews to poll a bigger group of people and confirm our interview results. The survey was administered online through Google forms, and the survey link was distributed through multiple avenues. Clear instructions that only people with online shopping experience were qualified to participate in the survey, however it was not possible to enforce such a criteria. In the end, 140 valid responses were recorded across the time period of 4 weeks. Unfortunately we were not able to control the balance of demographics, thus female students still dominated the results of the survey.

Figure 5.1.1 – Survey Respondents Breakdown



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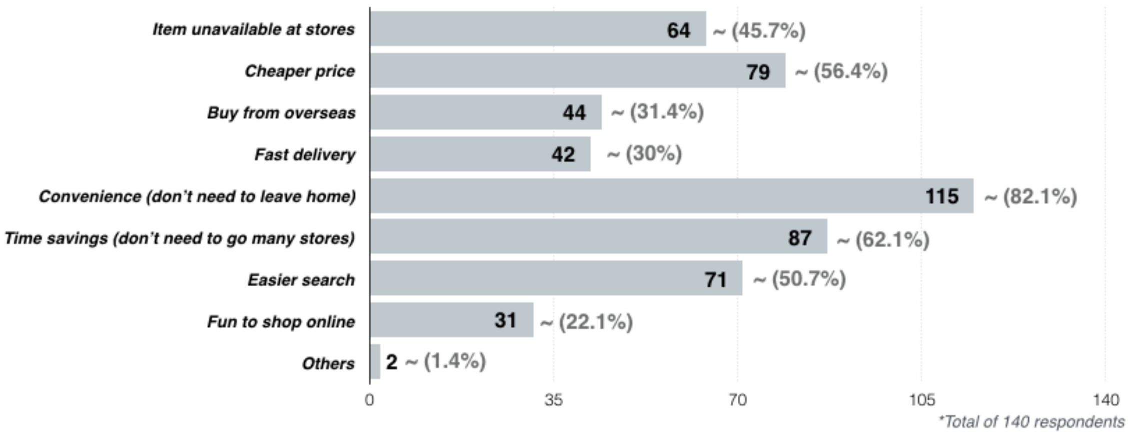
5.2 Survey Findings - Customer Profile

To start things off, the first part of the survey investigated the motivations for shopping online and what users were trying to achieve when they choose to go online. The stand out answers from the respondents (*Figure 5.2.1*) were how online shopping allowed them to have the convenience of shopping from home as well as making it easier to get things without multiple visits to different stores, resulting in time-savings.

Figure 5.2.1 – Motivations for Online Shopping



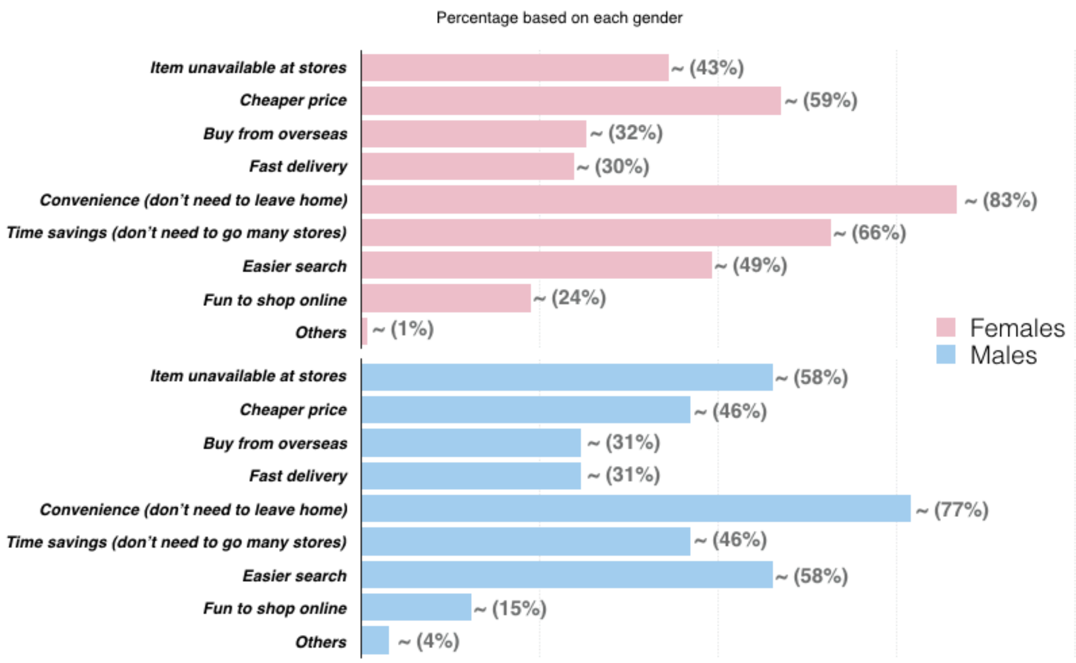
As shown above, 82% of respondents indicated one major consideration of online shopping was the ***convenience*** factor. The ***timesavings*** effect had 62% of the vote, whilst ***cheaper prices*** and ***easier search*** garnered 56% and 51% respectively. The results were hardly surprising as the retail industry shifts towards the online age many consumers have embraced the benefits of searching and buying on the Internet.

To further dive into this, the results could then be broken down to look at whether gender differences played any significant impact. After breaking down the results, it seems the ***convenience*** factor still was the major choice of both males and females (see *Figure 5.2.2*), but some differences in the other options were interesting to note.

doi:10.6342/NTU201702039

For the ladies, both ***timesavings*** (66%) and ***cheaper prices*** (59%) had more votes than ***easier search*** (49%). On the other hand, male counterparts indicated that ***easier search*** (58%) and finding ***items unavailable at stores*** (58%) were more likely reasons to shop online.

Figure 5.2.2 – Gender Differences in Motivations



For the guys, ***timesavings*** (46%) and ***cheaper prices*** (46%) were less popular answers. As for the other reasons to shop online they pretty much contributed similar percentage of votes regardless of gender differences. Perhaps the only difference was females viewing online shopping as more fun, almost 10% more than males, even if this might be a typical stereotype for anyone to have.

The general results indicate that the Taiwanese consumers are still very objective when it comes to online shopping, less than a quarter of respondents both male and female said that it was ***fun to shop online***. Seems our consumers had "Jobs" that were practical rather than experiential.

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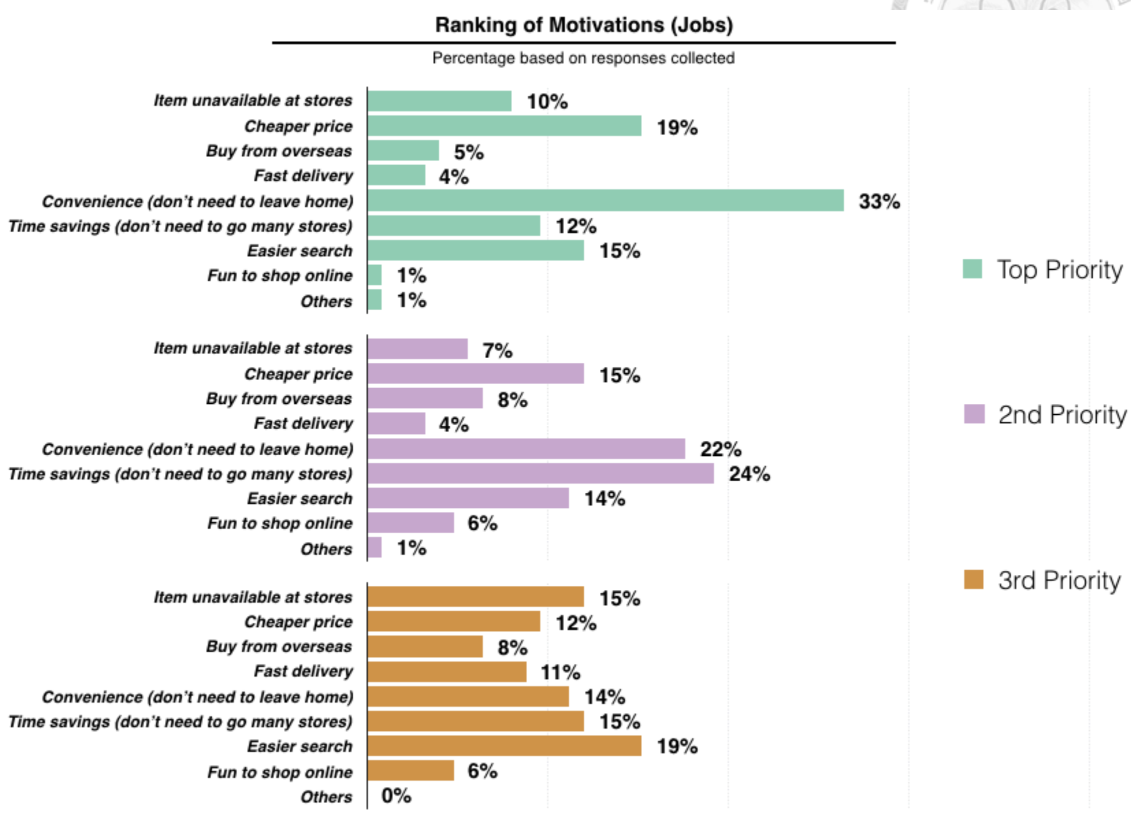
Figure 5.2.3 – Motivations by Priority

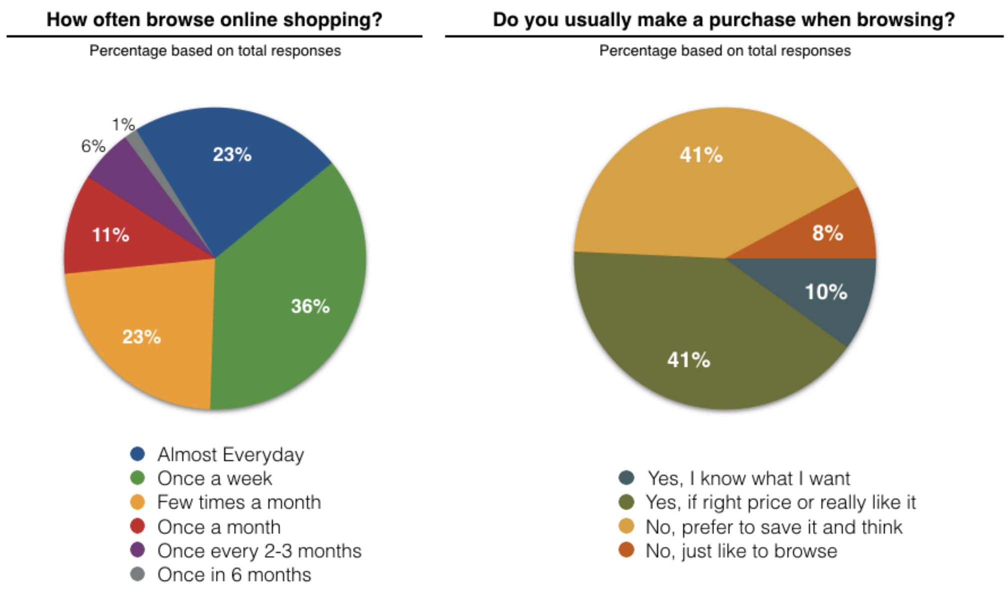


In order to also understand the level of importance of these "Jobs", respondents were also asked to rank them. As seen from Figure 5.2.3 above, the convenience factor was overwhelming when it came to the top priority for our respondents with 33% saying that would be their main reason for shopping online. As for making a choice for the second ranked reason, the group was split between convenience (22%) and timesavings (24%). However, as we move from top priority to 2nd and then to the 3rd priority you would notice that the percentages are becoming less dominant. When users had to choose what was their 3rd priority, the scores were much more evenly spread across the board with ***easier search*** edging out the other reasons slightly at 19%. This suggests that everyone might have a very strong common reason in their mind when they choose to go online shopping, but after the main reason everyone has different priorities as they are trying to focus on different "Jobs" as also indicated with the gender difference in *Figure 5.2.2* earlier.

doi:10.6342/NTU201702039

The next questions helped us to get a better idea of the frequency in which our users went online to shop, and whether they completed their purchase.

Figure 5.2.4 – Browsing vs. Purchasing



Most of the respondents were frequently using shopping platforms online only half of them were completing their purchases regularly. The other half were simply just browsing or would save the items they liked for further consideration. Whether they did complete the purchase at a later time is not captured in this survey.

Based on the initial research as well as insights from our interview, it was obvious that mobile apps were still not as popular as websites here in Taiwan. The survey results (*Figure 5.2.5*) confirmed this with more than 80% saying their preferred choice was websites, but on a positive note about half of the respondents gave a definitive "Yes" (*Figure 5.2.6*) when asked if they would increase their usage of mobile apps if the overall experience were improved.

doi:10.6342/NTU201702039

Figure 5.2.5 – Platform Preference

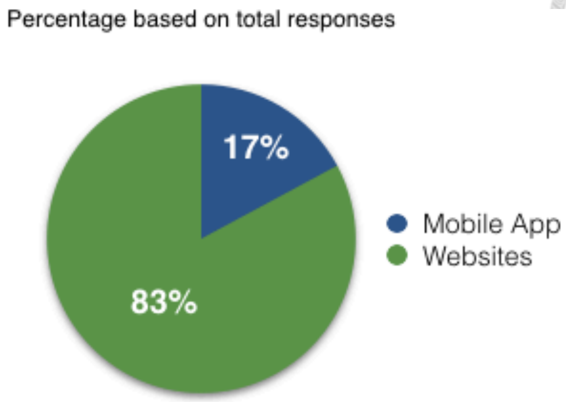
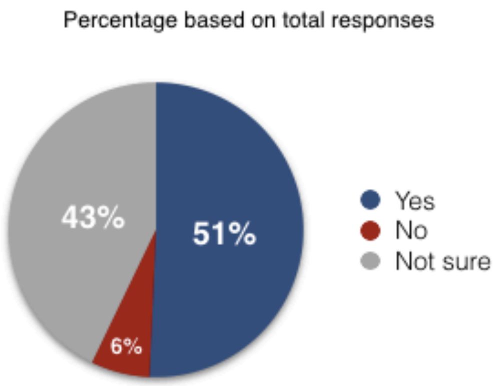


Figure 5.2.6 – Improved Apps lead to Increased Usage



The next question started to narrow down on why they felt frustrated by the mobile app experience and what were the "Pains" of using mobile apps. The summary of the results as shown in *Figure 5.2.7* reveals that 62% of respondents felt the ***limited items displayed on screen*** was a frustrating point when using mobile apps. This means that 2 out of 3 users feel the limited display of items sour the shopping experience.

This lack of display real estate might also have indirectly caused frustrations linked to ***navigating too many pages*** (45%), ***hard to view detailed information*** (44%) and ***poor layout & design*** (30%). A small number of respondents said they had no major

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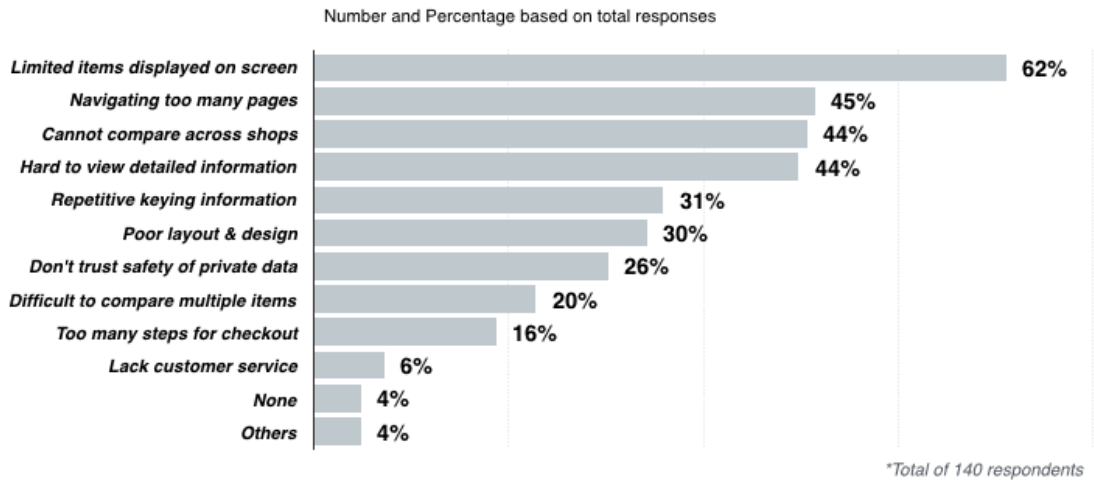
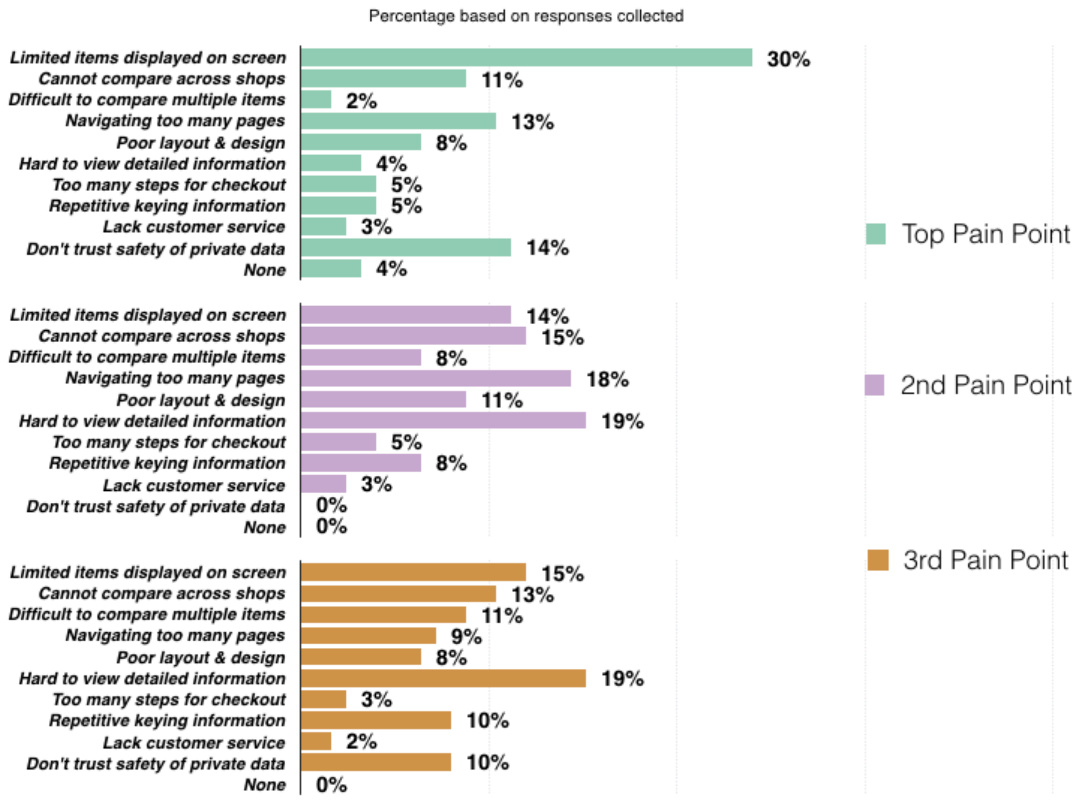
frustrations with the app experience, but aside from that 4% of our respondents, it was a pretty clear everyone had some complaints to share.

Figure 5.2.7 – Frustrations Using Mobile Apps



In the ranking, again overwhelming top pain point is the ***limited items displayed on screen***, but at 2nd and 3rd spot, the choices are not so dominant.

Figure 5.2.8 – Ranking Frustrations



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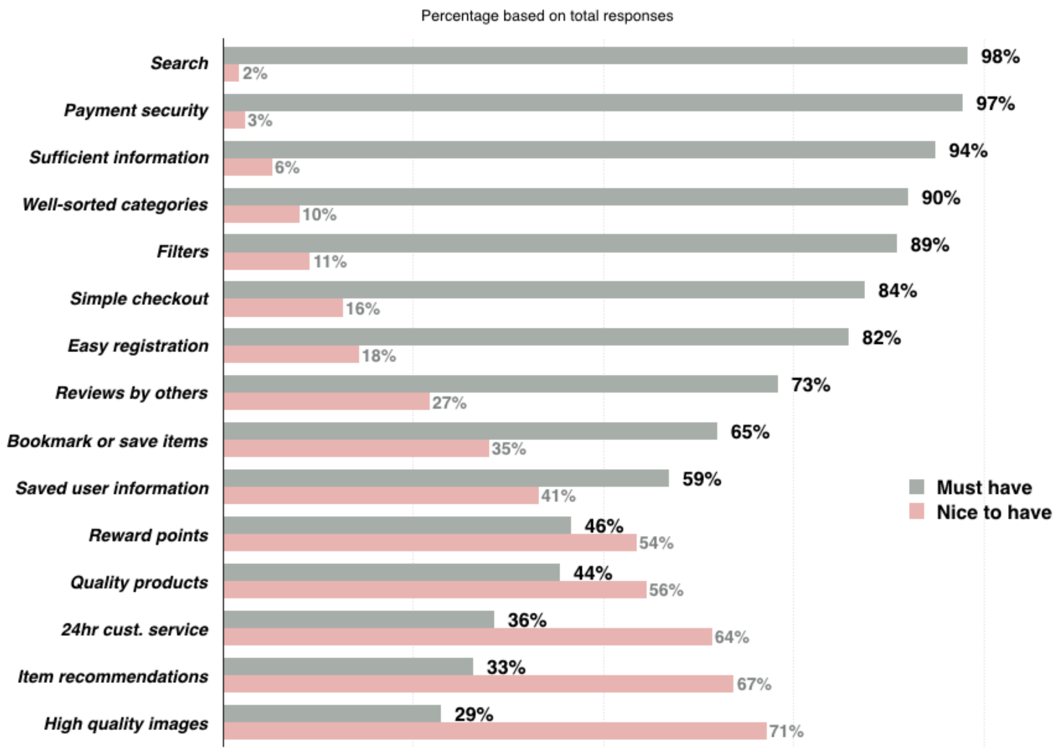
Next we moved on to the "Gains" portion of the Customer Profile, investigating the features that consumers felt were required and which were not as critical. The features are arranged from top to bottom in descending order of necessity (Figure 5.2.9).

Top of the list includes ***search***, ***payment security***, ***sufficient information*** as well as ***well-sorted categories*** where almost all said that it is a critical must have expectation of any good online shopping platform.

Further down the list it would be worth noting that the percentages were starting to get evened out, such that less of our respondents felt the feature was a required gain. Towards the bottom of the list starting from ***reward points***, other features such as ***quality products*** and having a ***24-hr customer service*** all become more of a "Nice-to-have" with the pink bar overtaking the grey one.

Figure 5.2.9 – Expectations of Respondents



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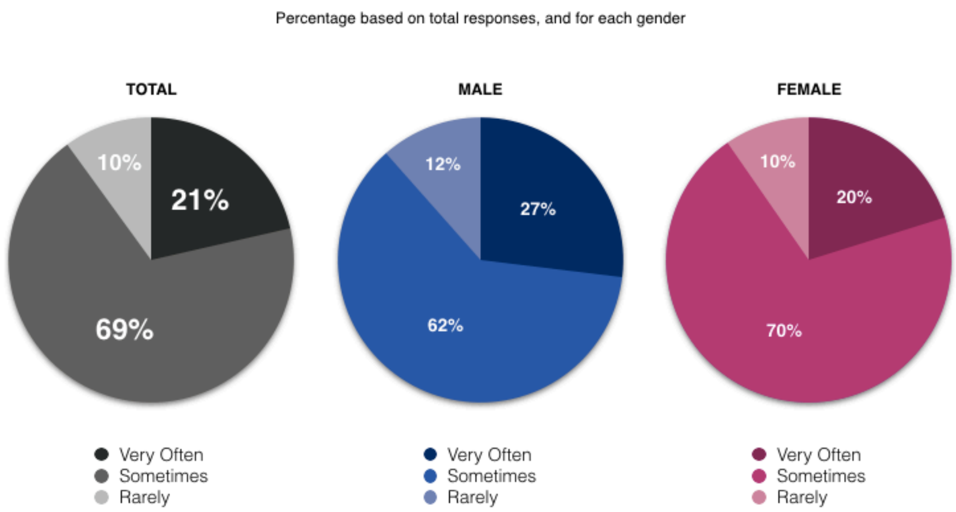
5.3 Other Insights From Survey

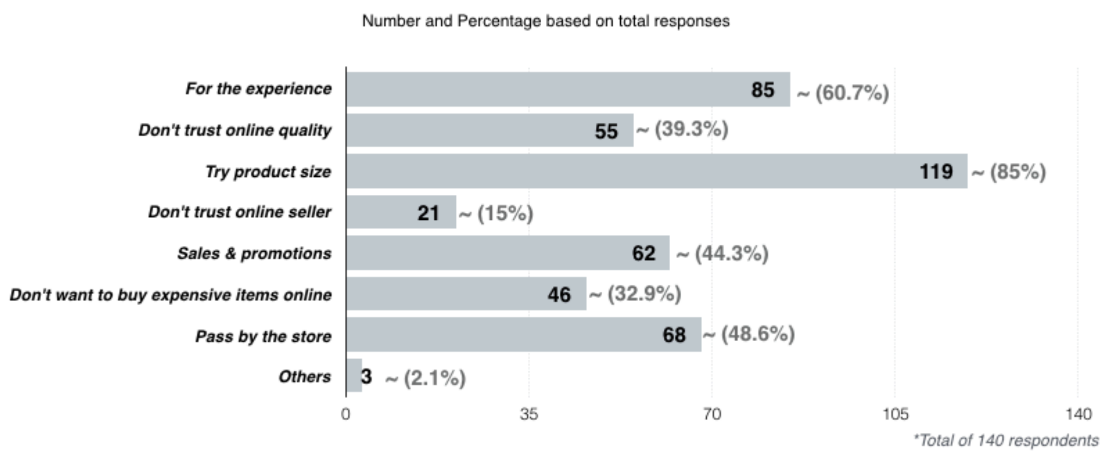
Our survey also allowed us to collect some additional information. We explored if users had shifted their shopping entirely online or still were frequenting the brick-and-mortar shops. Then as a follow up, we asked why they did so.

Figure 5.3.1 – Do Online Consumers Still Shop Offline



Almost everyone said that they would continue to frequent the physical stores; only 10% said they rarely visited stores after online shopping. Also surprisingly males had a tendency to either swing more to visiting stores very often or rarely after trying out online shopping.

Figure 5.3.2 – Motivations for Offline Shopping



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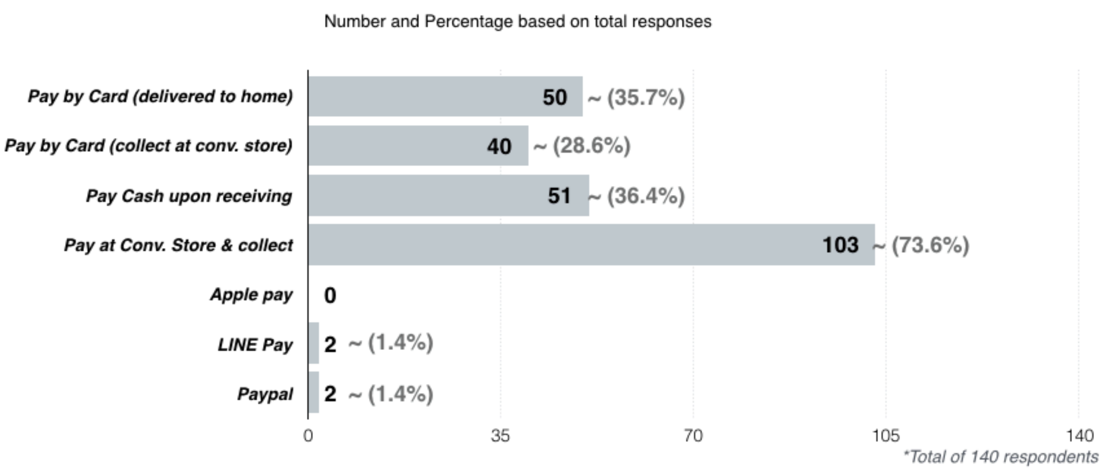
The obvious reason for visiting the stores was as expected - they wanted to ***try product size*** (85%) but results were also rather clear that consumers still recognized that shopping at the physical stores was also ***for the experience*** (61%). A quick glance at the statistics for both male and female showed little difference in terms of reasons to visit physical stores and that gender didn't have any impact in this area.

As mentioned earlier in this paper, Taiwan boasts a really strong network of delivery options from using convenience stores to actual postage services. For our survey, a large majority said that they would pay at the convenience store when collecting their goods (*Figure 5.3.3*). In fact if you combined that with those who would also choose to pay by card but collect their goods at the convenience store that makes up a large portion of people's choice.

Still there is a very obvious explanation, many homes in Taiwan are flats that have small letterboxes, and during the day it is likely that nobody is home. The simplest solution is this network of convenience stores, where you don't have to worry about being home to collect items.

Figure 5.3.3 – Payment Preferences



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What is clearly noticeable here is also the lack of third-party payment integration. Amongst all out respondents, only 4 had used other options such as LINE pay or PayPal. This may be something that will change in the future, but for now it seems the locals still prefer to ***pay by card*** or ***pay at convenience stores*** when they are collecting their goods.

To wrap up our study, we also wanted to find out if the Taiwanese consumers would be willing to embrace an in-app integrated online marketplace similar to what we asked in the interview. Turns out only about a third said that it would be useful and they would use it (*Figure 5.3.4*). Perhaps it would be unfair to judge, as many would not know if they would actually use it because they have yet to see what it can do. Thus we also followed up by providing some potential benefits such an integrated marketplace would offer and asked our respondents that would seem attractive to them (*Figure 5.3.5*). It seems the Taiwan market may not be fully ready for a WeChat-like marketplace but perhaps in the future users will gravitate towards a more seamless online shopping lifestyle.

Figure 5.3.4 – Would Use LINE Marketplace?

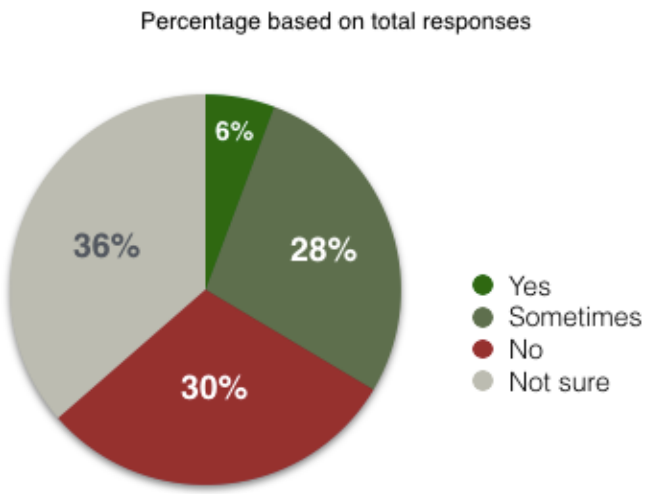

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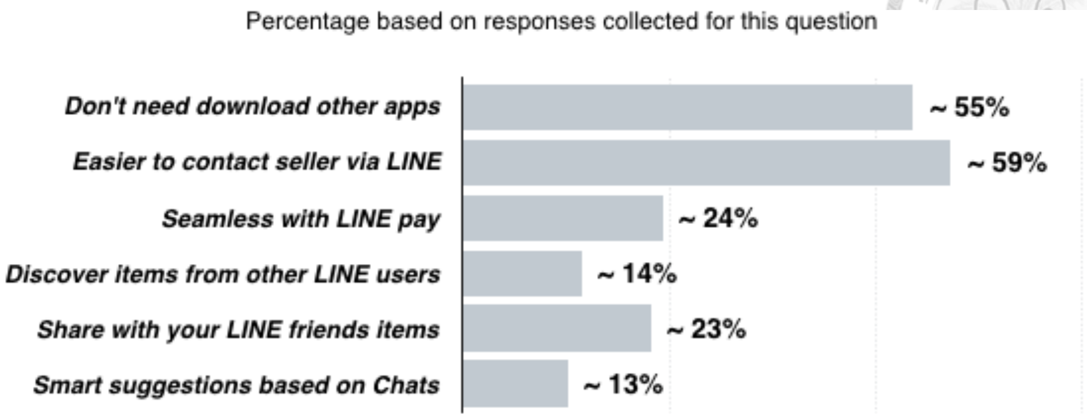
Figure 5.3.5 – Pull factors for LINE marketplace



5.4 The Similarities

Both set of results point towards the similar "Jobs" that users are trying to achieve – purchase conveniently, save money as well as search for items easily and save time. Through the survey we were able to get a little more clarity on slight differences due to gender. Females enjoyed browsing online and saw online shopping as fun, whilst males are keener to search, compare and purchase items. Both set of results also indicate that brick-and-mortar shops will still very much be a part of the world of retail for now.

Majority of survey respondents echoed our interviewees, choosing websites as their preferred platform, and said they would be unlikely to change in the near future. In terms of "Pains" while using mobile apps, both set of results showed similar results. The limited items they could view at one time remained a major pain, and users also frowned upon not being able to compare easily while using apps. Poor display of information, poor layout and navigation were also significant points mentioned.

As for "Gains" – search, filters, well-sorted categories and payment security were all ranked highly in the survey responses, mirroring our interviewees' focus on the search and compare phases of the user journey. Both sets of results also showed the issue of

doi:10.6342/NTU201702039

trust was important to users. Finally, the market seems not to know how an in-app integrated marketplace might benefit them, but some were willing to try just as our interviewees had reflected.

5.5 The Inconsistency

Our survey results also show slightly different findings from the interview insights in the choice of payment options. Whilst our selected interviewees had mentioned that they would prefer paying by card, our survey results indicated a much larger majority preferring the Taiwanese network of convenience stores.

During the interviews, it was also mentioned that good display images and product information were something they would really like, but our survey indicates that high quality images is at the bottom of the must-have features. The same goes for item recommendations. Moreover, while our interviewees had also specified that product quality was an important factor, our survey results showed that quality products were not as critical.

There may be some slight discrepancies between our interview insights and our survey results but the overall outlook on online retail as well as mobile shopping apps have been pretty similar.

doi:10.6342/NTU201702039

6. LIMITATIONS

6.1 Limitations of Interview

Due to time constraints there were only 4 candidates chosen and whilst they were carefully selected to fulfill certain criteria, it could have been helpful to have more interviews conducted. Furthermore, our interviews focused very much on just one group of online shoppers: university students in the mid-twenties and young working professionals in the early thirties.

There also exist a growing number of users in both younger and older age brackets, which we have left out in this study. Future studies can definitely consider both the younger and older audiences to get a more accurate picture. Lastly our interviewees focused very much on the functional aspect of online shopping, and did not share sufficient thoughts on the emotional or social aspects of online shopping that they had.

6.2 Limitations of Survey

The survey was designed in Chinese and administered online, in the hopes that only people that fulfilled two criteria would complete it: local Taiwanese and those who had sufficient experience shopping online. However, we were not able to fully control the respondents who did complete the survey, so there is no certainty that the survey answers were from people who really had experience shopping online.

Also the survey was designed using the findings from the interview as options to select, thus it may not have given respondents full flexibility to come up with their own thoughts and answers. Lastly, considering the size of the online retail market here in

doi:10.6342/NTU201702039

Taipei alone, the sample size of 140 may have been rather small. Turns out the demographics of our respondents also swayed very heavily towards female students and if further studies were to be undertaken, perhaps they could explore a larger sample and one that had more balance between gender and age.

6.3 Inherent Platform Characteristics

Some may feel that there are still characteristics of mobile app shopping that we cannot change, i.e. the screen size and how we display information on a mobile screen size. The argument is not wrong, as our results also show that the current mobile retail app experience does make website shopping more attractive. Perhaps in the near future it is very difficult for us to imagine how that can be changed, and may be tempted to believe that no matter how mobile app providers try to improve the shopping experience they are unable to get past this hurdle of the limited screen size.

However, time has proven over the last decade how technology changes so quickly and what was once unheard of has become a norm. The mobile app retailing scene will not be any different. Innovation and new ways to display information will come along, and when that happens it will only new doors to how things can be shown and interacted with even on a screen size that fits in our pockets. Current characteristics may no longer hinder our consumer experience in the future.

doi:10.6342/NTU201702039

7. IMPLICATIONS

7.1 For Mobile App Platforms

Based on our Product-Customer “Fit” mobile retail apps have done a pretty good job, but failure to alleviate customer pains proves to be its biggest issue. The limited items displayed on screen and poor layout were main frustrations both interviewees and survey respondents had highlighted while exploring the topic. It remains an immense challenge to provide a well-designed layout or user interface (UI) that showcases all of the products yet stay simple enough to provide the best user experience (UX). Not only is displaying products important but displaying the right amount of information, and making it easy to navigate across pages. What makes it difficult is trying to do a refresh or re-design of your mobile retail app. Many companies are stuck with a design or UI, and having to spend money and time to do a total UI revamp may not be the easiest decision for many top managers. It’s hard to justify investments required without certainty of ROI, but perhaps they should consider that 50% of survey respondents said they would increase their usage of mobile apps if improvements were made.

If current mobile retail companies or brands really want win over the Taiwanese consumers, they have to start addressing some of their “Pain points”. We found out from our study that a large proportion of the audience are focused on the search and compare phases of the shopping journey. If apps are able to alter the way search results are presented, or provide consumers the right information, or allow consumers to quickly refine search results, they will be able to make it easier for consumers to achieve their search objective.

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Developing new capabilities that gives users the power to compare items also remains an untapped opportunity. As of right now, the mobile app experience has solely been focused on finding items, being recommended items and then purchasing. If companies want to breakthrough, then item comparisons within a particular shopping store or across different stores will be the way to go. It may not be the easiest thing to develop, but with so many various shopping sites or apps available on the market, such a pull factor would be significant. If consumers had a way to not only search and browse but to view price comparisons, this would be additional value that keeps them highly motivated to complete their purchase using your platform.

Other than making adjustments to relieve the critical "Pains" that users have, current market players should also note the subtle things such as payment options, delivery options, security, because it is really easy for consumers to be turned away and chose other available shopping apps. Design and layout could be something other mobile app providers could also accomplish well, making it is really easy for consumers to be turned away due to other flaws that may not exist in the other apps.

For someone new to the scene, having the ability to start on a clean slate gives them a very large advantage in coming up with a totally new shopping experience on the mobile screen. On the flip side, brands or companies thinking about entering the online retail space must be really careful too. The current market already offers consumers various options when it comes on online shopping, that means if you're not creating something that will stand out, soon you'll just be another mobile app on someone's home screen.

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According to data research firm Localytics, 80% of all app users churn after 90 days (J. Perro, 2017). Meaning that after 3 months, an app is only likely to retain 20% of its users. It will require careful planning and a strong strategy before taking the jump onto this mobile retail train. Managing the user retention becomes just as important as the acquisitions, the time people spend on the app becomes more important than just the number of downloads you get.

As for the possibility of introducing a new integrated marketplace within social chat app LINE, there are positive takeaways from this study. Although there were comments from both interviewees and survey respondents that showed slight uncertainty, many were also quick to point out that it would be something worth exploring. The success story of WeChat may not be an accurate benchmark due to different consumer preferences and shopping expectations in Mainland China, but that seamless flow brought together by WeChat's various functions have really made it an attractive option for many across China. It may be possible that LINE can also successfully create an easy to use a marketplace, with quick checkout processes via LINE pay, and social functions integrated with its original chat.

With strong competition and plenty of opportunities to take advantage of a growing online retail sector in Taiwan, mobile retail players have to be at the top of their game in order to stay relevant and to grow their market share.

7.2 For Website Retail Platforms

Taking note of all the features and expectations that consumers are looking for in an online shopping site is definitely the first step in the right direction, but there are many

doi:10.6342/NTU201702039

things to consider as we wrap up this paper. It is crucial for websites to take note that whilst they may be the current preference of Taiwanese consumers, this does not mean it will not change. Mobile app providers are going to try to improve the experience for users and will continue to draw more users over, resting on their laurels will surely be the downfall of any retail website platform.

Important points they can pick up from this study include the overall User Interface and navigation, as well as simplifying and encouraging purchases. Websites have much more display area to use to showcase products and promotions, but if not careful they can become messy and unattractive. The design and layout of the site not only serves to be aesthetically pleasing but it also helps in making the overall site's navigation smoother. They need to remember that it is as much about creating a website that is easy to use, as it is creating a website with many uses. One such use that many websites are lacking and can start exploring would be the ability for users to carry out comparisons – a sentiment that had been echoed by all our interviewees. As of now, this remains an area that not many have ventured into and can heavily swing local users in favour of a particular shopping site.

Websites also have to keep improving the user experience to build loyalty and long-term customer relationships. Allowing consumers to find items quickly and make purchases easily with saved information, makes buying hassle-free and consumers enjoy the shopping experience – creating a sticky factor which means users are more inclined to keep returning to your site.

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As the industry grows and consumers try to figure out how they will shop online, website providers will have to make careful decisions. Do they choose to invest heavily in their site and try to compete with mobile apps? Or do they also invest in developing their own mobile app version of their online store? For some it might be wise that instead to trying to win the fight between desktop and mobile, creating dedicated avenues for different target audiences might better position their brand/store for the future.

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8. CONCLUSION

The online retail industry has definitely become more dynamic in recent years. At the start of this paper, we took a brief look at the situation in Taiwan to try to better understand consumers and their attitude towards mobile app or website shopping. With a large potential for online retail to grow, the fact that shopping online was still mainly carried out using the desktop websites was unexpected - especially with smartphones dominating so many areas of our daily life now. Taiwan consumers spend a substantial amount of time on the smartphones (Consumer Barometer, 2015) yet they prefer purchasing from websites. Clearly the experience offered to consumers created some dissonance between Smartphone popularity and usage of mobile retail apps.

Through a series of in-depth interviews, real consumer thoughts were shared and allowed us to gain actual local based insights. Instead of adopting an overly mechanical or technical approach, we based our study on the simple product value offered to customers versus the frustrations that users were experiencing. Alex Osterwalder's Value Proposition Canvas became a guiding principle in exploring the consumers' preferences and pains, making it easy for us to see where platforms had lived up to expectation and where it had failed.

The valuable personal sharing that each interviewee brought to the table gave us a deeper understanding of the "Gains", "Jobs" and "Pains" of the customer and allowed us to complete Osterwalder's Value Proposition Canvas. Based on the two separate canvases we were able to draw up, both mobile app providers and retail websites will be

doi:10.6342/NTU201702039

able to adopt a customer-inspired approach - tailoring their product/service to satisfy the needs and also relieve the pains of consumers.

At the same time, our study also reminds us that building an online shopping platform isn't solely about ringing up purchases, but converting buyers into long-term consumers. A good solid after-sales service, and proper brand building is essential. Advertising and marketing not only increases your app or site visibility but if done well could also help to change perceptions that online shoppers have.

The overall aim of the paper was to explore the preferences Taiwanese online consumers had, and how that shaped their choice of platform when it came to online shopping. Through both interview and survey, we have managed to get a clearer picture of the situation and a deeper understanding of local consumers. Now brands and companies can push ahead with adjustments to better take advantage of the growing online retail market in Taiwan. For some this will mean a refresh of their website, for some it could be a clean start in designing a new shopping app. For others it might even be to improve both app and website, strengthening their Omni-channel strategy as consumers increasingly embrace multiple devices throughout the purchase journey.

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10. APPENDIX

Interview Guide and Sample Questions

Section A - Exploring Goals and Motivations

Why do you choose to shop online? * Clarify reasons for online shopping

What about actual / physical stores? Do you still shop there?

Does online shopping change the role of the physical store for you?

Section B - Exploring Habits & Patterns

How often do you shop online?

How much do you usually spend?

How do you usually pay? What are your payment preferences?

How often do you complete a purchase when browsing or shopping online?

Section C - Exploring Platforms and their Pain Points

What platforms do you usually use? - If mobile apps what apps?

For Mobile Apps, what are some of the frustrations or pain points of using them?

How do those pain points you listed affect your purchase completion rate?

For Websites, what are some of the frustrations?

How do those pain points affect your purchase completion rate?

Section D - Comparing Platforms and Required/Expected Gains

How would you say your overall experience using both platforms have differed?

Do you have a personal preference what to use and why?

What do you think are some of the basic requirements for any shopping platform?

Is there any difference in expectations for Mobile Apps VS websites? What difference?

Do you think Social media or influence affects your choice of online platform?

Would you foresee yourself changing your preference in the near future? Why?

Section E - Exploring future

What do you think of a new integrated online marketplace in your LINE app?

What basic requirements does it have to fulfill for you?

What features would you expect it to have or expect the experience to be like?

Any other comments you would like to share about the future of online shopping?

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