

「個人向けECの新たな展開」

個人向けEC市場は、新型コロナウイルス感染拡大に伴い、物販系分野は、2019年は10.1兆円であったのが、2020年は12.2兆円、2021年は13.3兆円と急拡大している。利用者は、従来利用することが少なかった高齢者層も含めて拡大しており、かつ購買品目も食品などの利用率が高まっている。一方、小売市場全体に対してECが占める比率であるEC化率は2021年が8.78%と伸びてきているが、世界の19.6%に比べると、まだまだ低いのが現状である。

今後の日本における個人向けECはどのように変化していくのか。量的拡大と同時に、質的にどのように変化していくのかが注目される場所である。日本においては、小売店舗が多く、ネットワークが整備されているなか、オンラインとオフラインの融合による、マルチチャネル、オムニチャネル、O2O (Online to Offline)がどのように進展していくのか。SNS利用が増えるなか、マルチデバイス、クロスデバイスがどのように進展していくのか。国際化のなかで、越境ECがどのように進展していくのか。ECは、データの収集が比較的容易であるが、顧客ニーズに合ったデータドリブンマーケティングがどのように展開していくのか。また近年、宅配危機、物流危機といわれるように、ドライバー不足が深刻化しており、EC企業においては、宅配サービス内容の見直し、ラストワンマイル配送のネットワーク構築が急務となっている。個人向けECが今後どのように進展していくのかについて、様々な視点から論じるものである。

洪 京和

New Developments in e-Commerce for Individuals

Since the start of the Coronavirus pandemic, total sales value in the retail e-commerce market has soared from \10.1 trillion in 2019 to \12.2 trillion in 2020 and \13.3 trillion in 2021. The range of e-Commerce customers has expanded to include many older individuals who previously did not purchase much, online, while the range of products has shifted to include a larger percentage of food purchases. In addition, e-commerce is expanding its share of sales for the retail industry as a whole. In Japan, e-commerce now accounts for 8.78% of total retail sales, but this is still very low compared with the global average of 19.6%.

Looking ahead at the future direction of e-Commerce retailing in Japan, we will be closely watching to see what changes occur not only in sales volume, but also in the quality of products and services provided. In Japan, most retailers have established networks with numerous store locations, so it will be very interesting to see how they develop their retailing networks to balance online and offline sales activity, and manage the gradual shift towards online activity. Retailers are adopting multi-channel and omni-channel strategies which merge their various real-world retailing channels with online, Internet-based sales operations, as well as seeking ways to use online services to attract customers to physical stores (online-to-offline).

As social media networks develop, it will also be interesting to see how e-Commerce platforms evolve to operate across multiple smart devices, and how the market as a whole evolves to handle the increase in international, cross-border e-commerce. As e-commerce makes it easier for retailers to collect data on customers, it will also be instructive to see what sort of data-driven marketing efforts they develop in order to better address customer needs. Finally, as Japan struggles to address a developing crisis in home delivery and distribution, due to a shortage of delivery truck drivers, it will be interesting to see what steps online retailers take to address the effectiveness of their logistic services. At present, one of the most urgent challenges is to develop more reliable networks to handle the “last-mile” phase of delivery, which takes products from a local warehouse to the final customer. This paper will take a closer look at the many issues related to retail e-commerce in Japan, and discuss the issues and perspectives outlined above.

HONG, Gyeonghwa