國立交通大學經營管理研究所

National Chiao Tung University Institute of Business & Management

行銷管理期中報告

紅海行銷戰略分析

-以HP筆記型電腦為例

指導老師：唐瓔璋 教授

組別：第一組

組員：岳蕙蘭、周志鴻、林士元
葉金源、翁秋賢、周芃茹
蔡秋榮、黃宏祥、李志弘

中華民國96年11月17日

我們這一組

- **我們**歷經三個週末夜的熱烈討論
- **志鴻**辛苦找資料，半夜夢到五力分析
- **士元**到處詢價，還被商家趕出來
- **秋賢**為了大家討論所必要設備，來回奔波
- **秋榮**連三個周末單日乘坐高鐵4趟，成了高鐵達人
- **金源**每周末上課、討論超過12個小時
- **志弘**想盡辦法透過管道找出消費者行為資料
- **蕙蘭**努力搜尋市場份額資訊，累的食不下嚥
- **宏祥**竭盡思慮，提供精闢行銷分析
- **志弘**、**芃茹**自告奮勇，上台一鞠躬^_^!

某天台北天空落下一塊招牌…

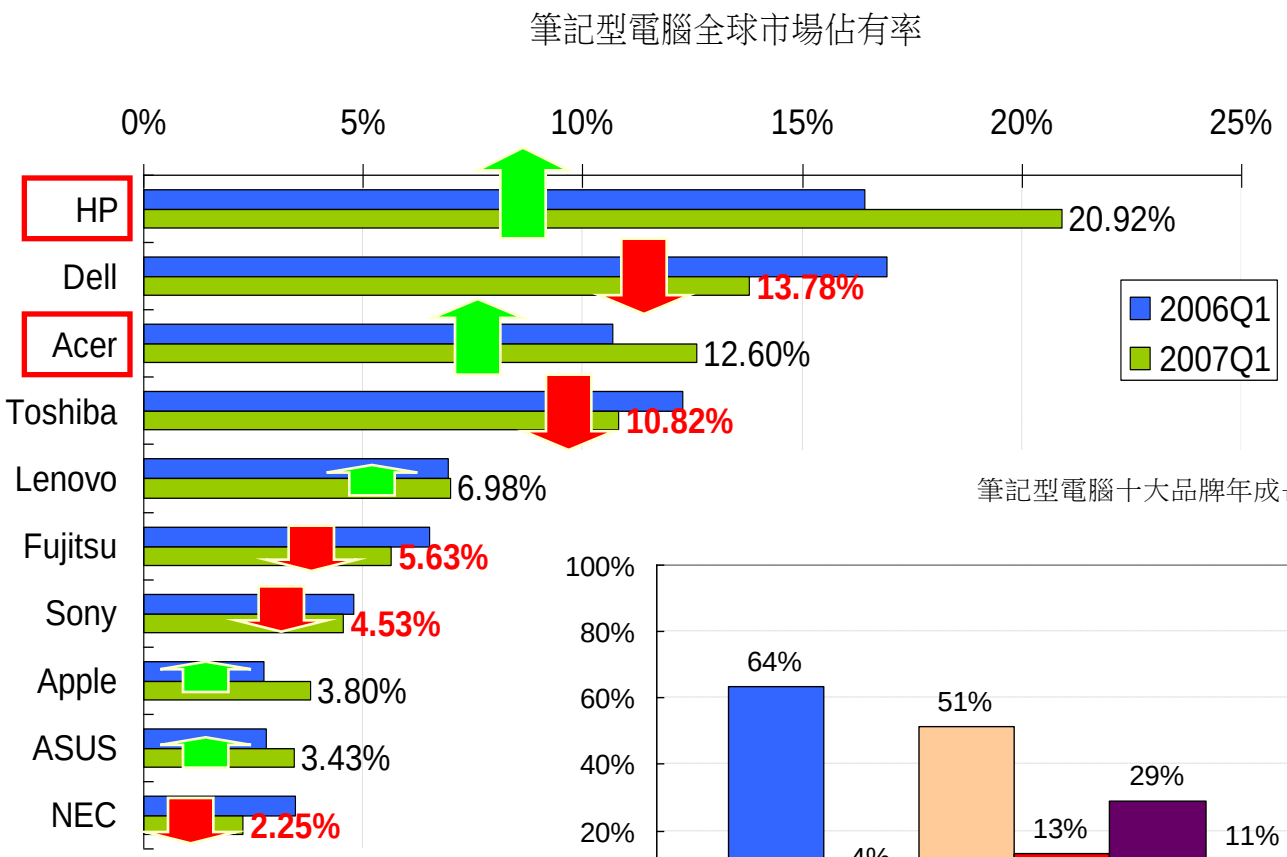
- 砸到10個人，他們身上有:
  - 手機 12 支
  - 筆記型電腦 4 台
  - iPOD 2 台
  - PDA 2 台
  - 數位相機 1 台
  - …

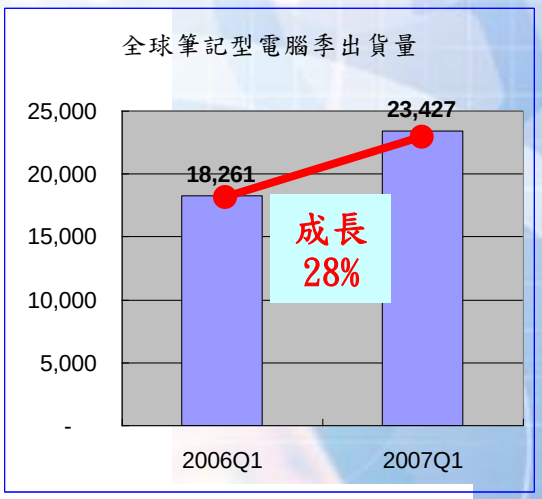
現代人數位裝置片刻不離手，只因功能愈來愈好、價格愈來愈低。然而市場競爭也愈來愈慘烈，紅海行銷思維於焉展開…

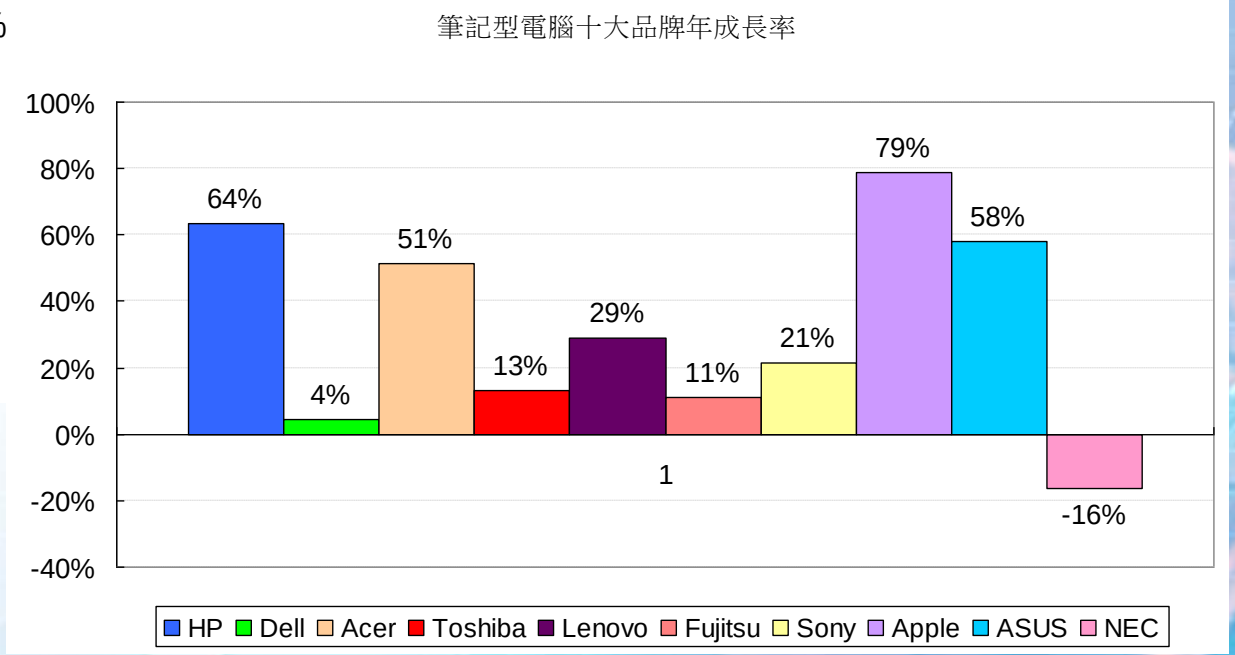
報告大綱

- 總體環境分析（1E）
- 個體環境分析（3C+五力）
- 競爭優勢分析（SWOT）
- 行銷組合規劃與決策（4P+STP）
- 問題與討論

全球筆記型電腦市場佔有率



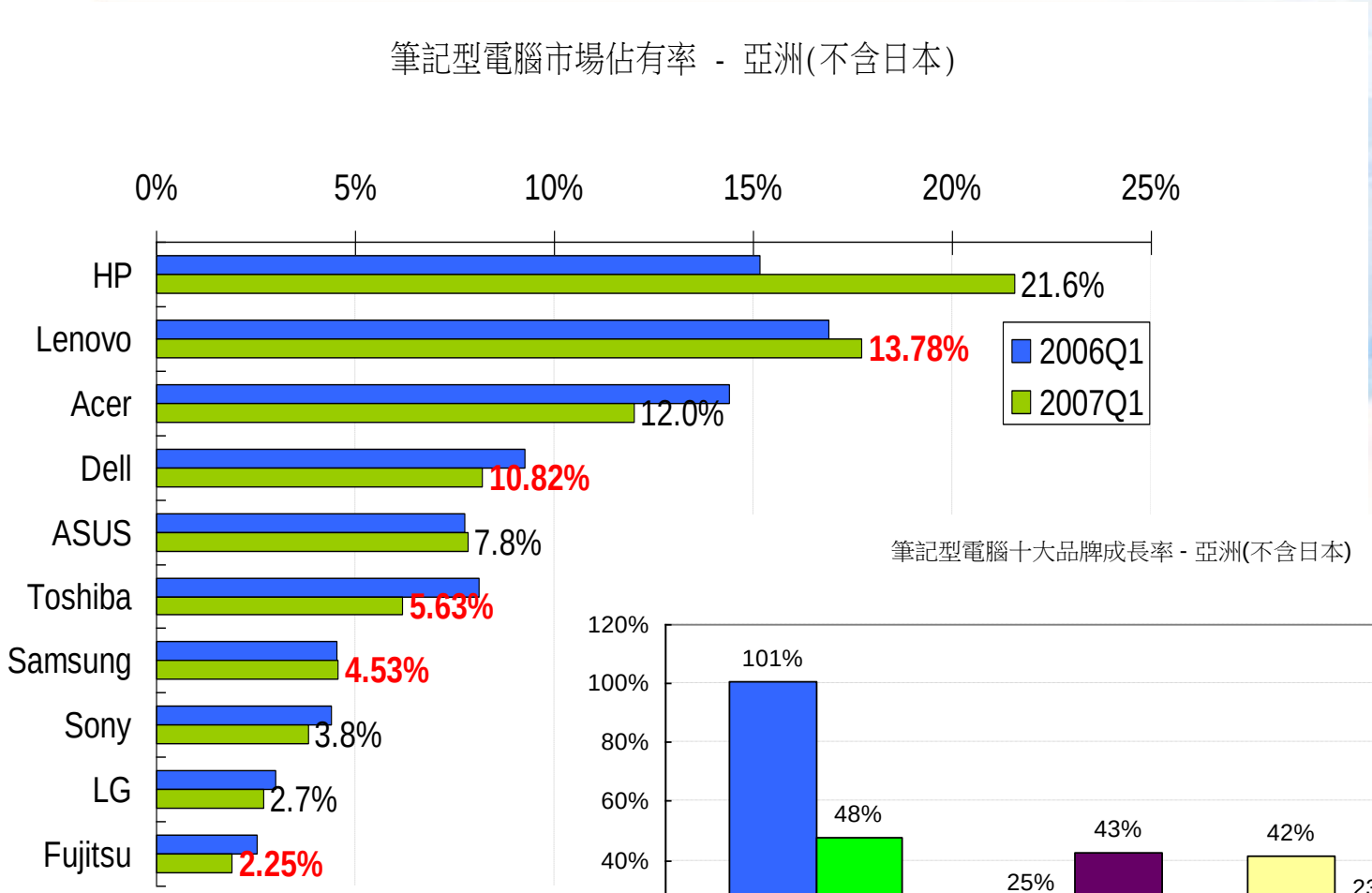


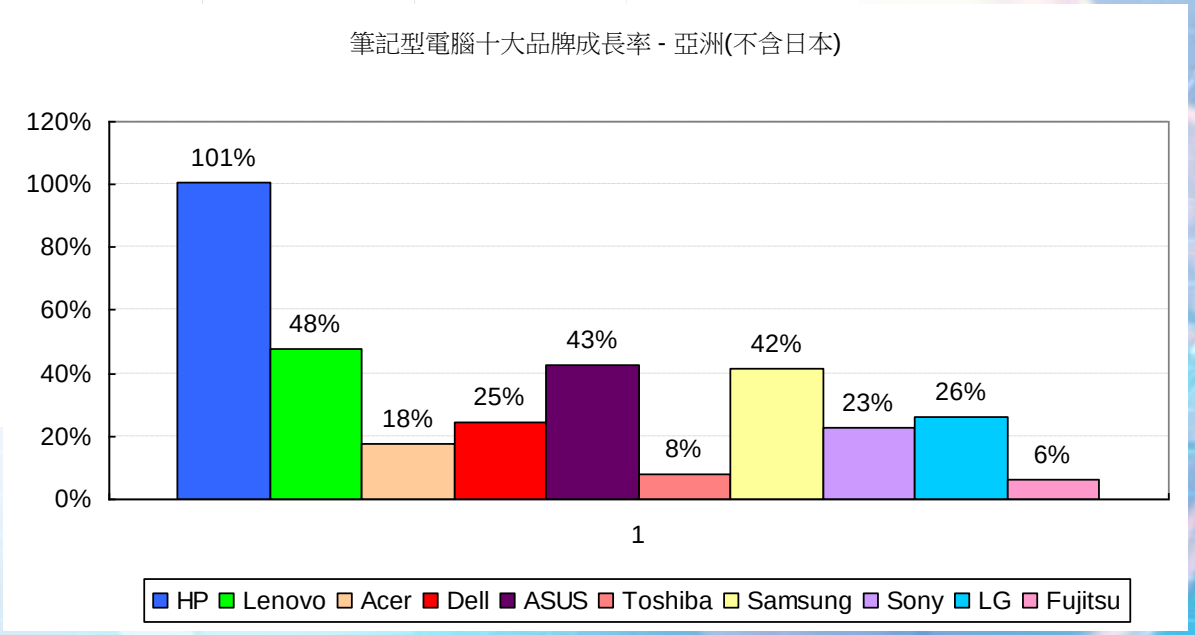


Source: IDC Q1 - 07 Prelims Top 10

資料來源：IDC Q1 2007 worldwide data

亞洲筆記型電腦市場佔有率(不含日本)

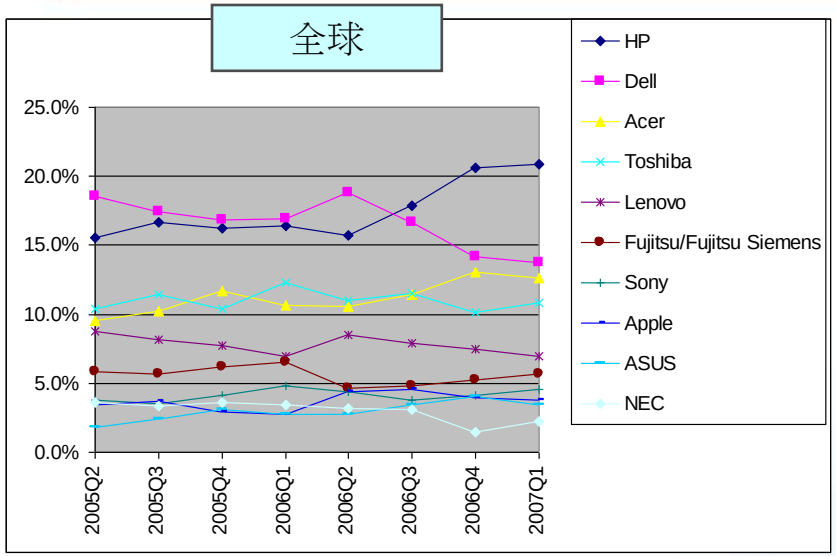


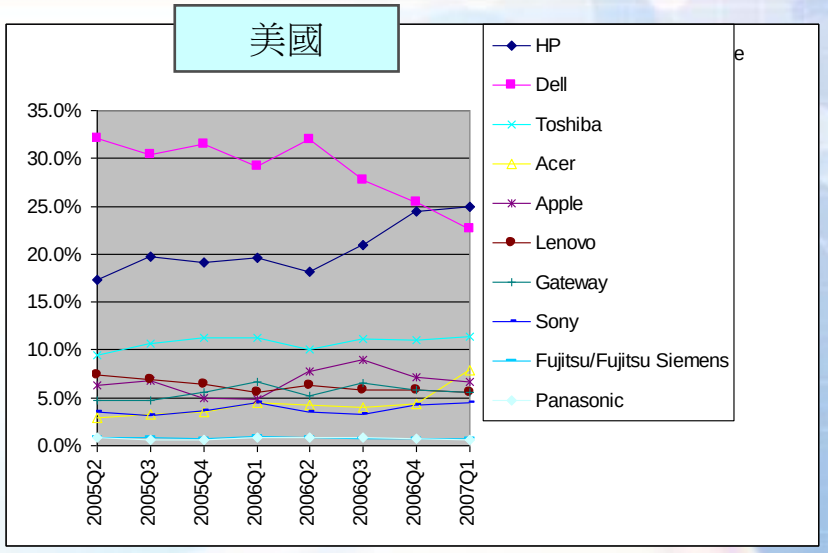


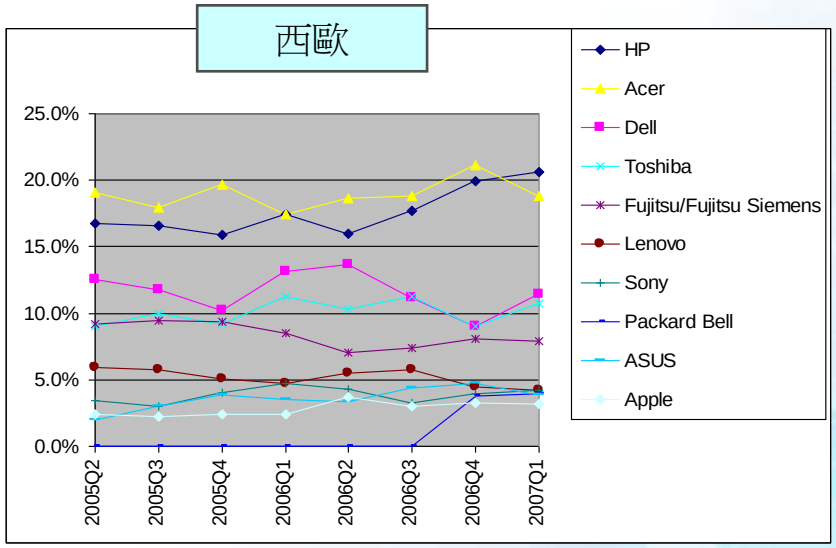
Source: IDC Q1 - 07 Prelims Top 10

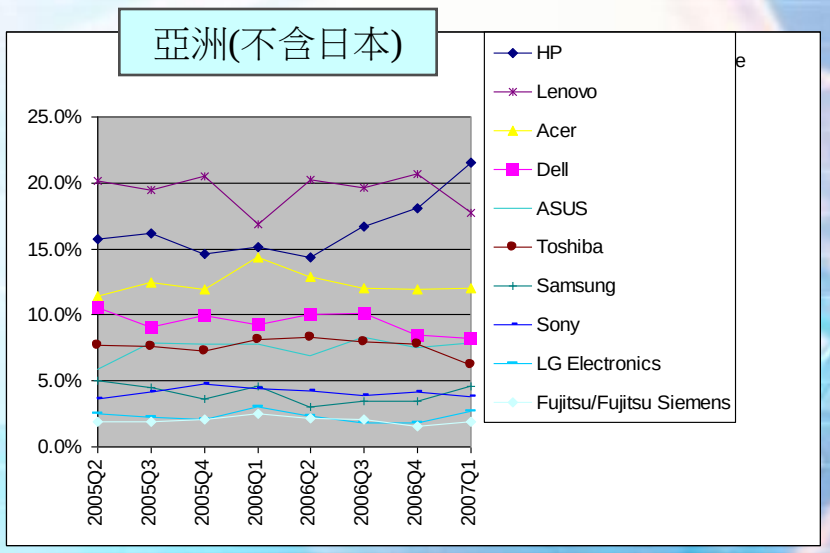
資料來源：IDC Q1 2007 worldwide data

筆記型電腦市佔率波動分析





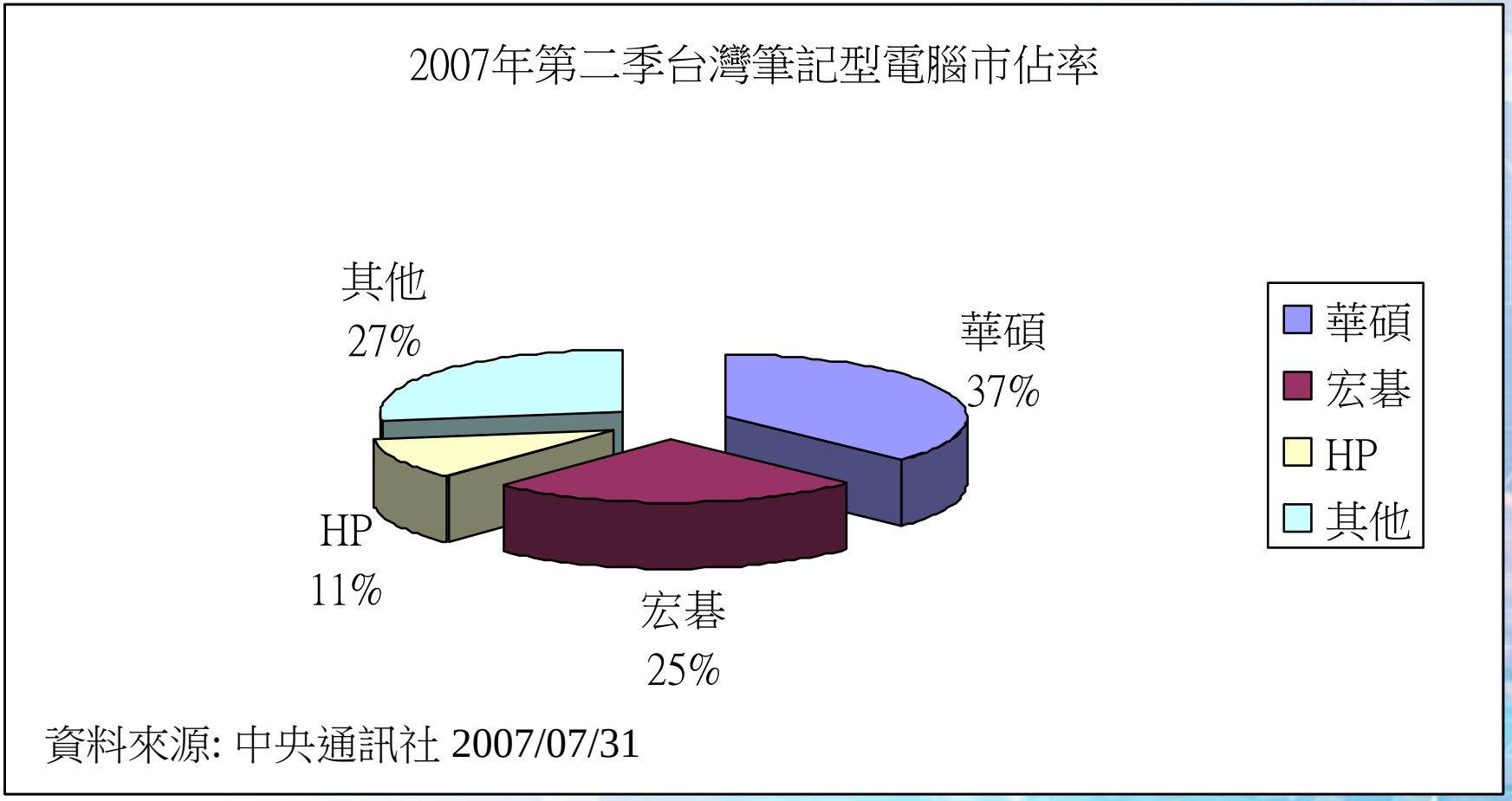




資料來源：IDC Q1 2007 worldwide data

>> 日本市佔率

台灣筆記型電腦市佔率(2007Q2)



聯合新聞網 2007/11/07 -宏碁擊敗華碩 重登台灣NB龍頭
(Acer高層證實，惟尚無最新市調數字)

競爭慘烈(紅海)的筆記型電腦市場

- 供過於求
- 產品差異不大(標準化)
- M型市場成形
- 低成本、低利潤產業結構
- 整合併購持續
  - HP + COMPAQ
  - Lenovo + IBM
  - Acer + Gateway
  - Next?
- NB逐漸取代PC成為個人電腦選擇

報告大綱

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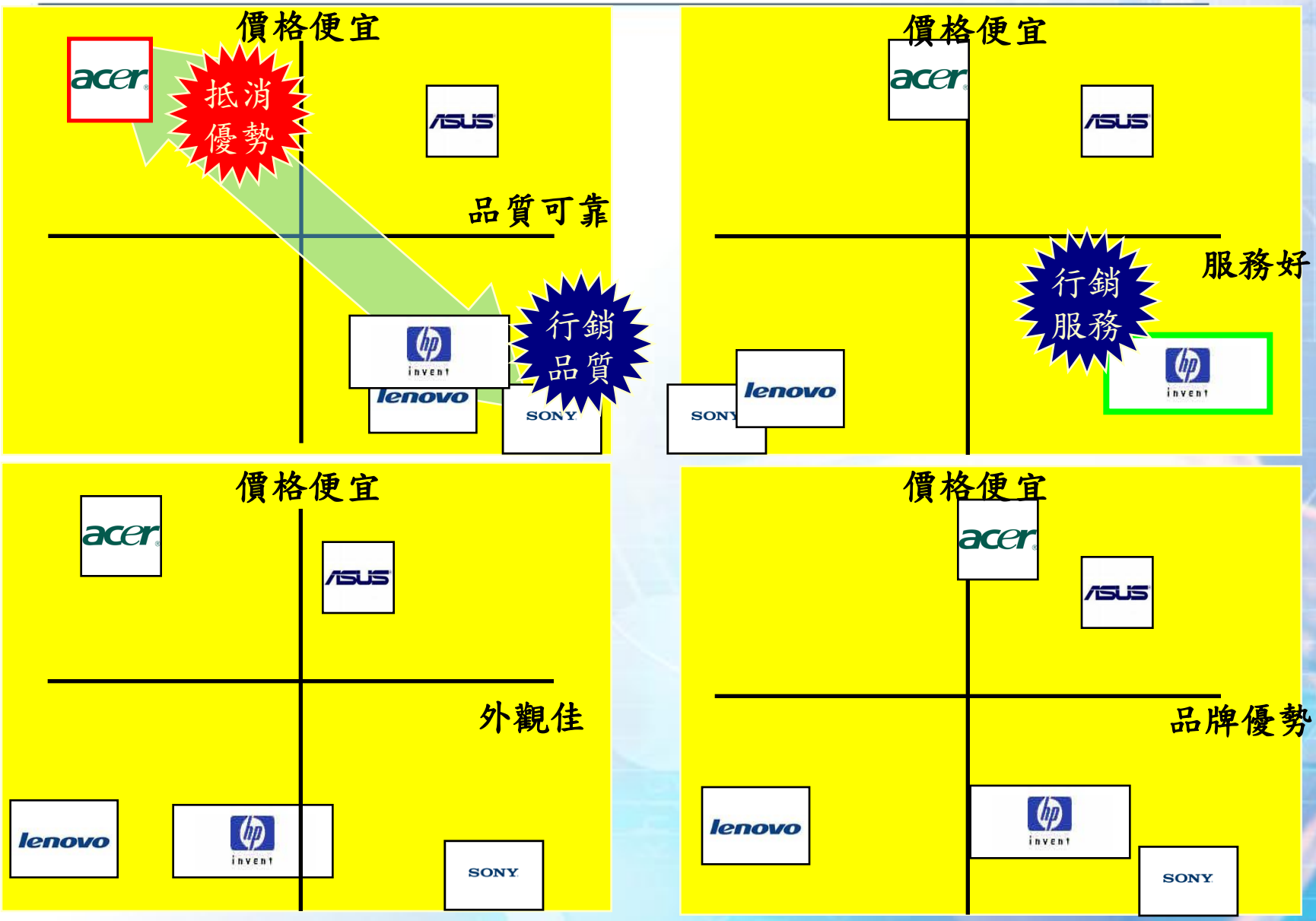
- 問題與討論

消費行為分析表(產品屬性評分)

產品屬性	科技感	娛樂性	品質可靠	售後服務	價格便宜	外觀	品牌形象			
權重 / 品牌	1	2	7	5	6	4	3	總分	加權總分	排名
Asus	6	7	6	6	6	5	7	43	169	1
Sony	8	6	8	1	1	7	9	40	142	2
HP	4	2	5	8	2	4	6	31	129	4
Acer	1	5	2	4	9	2	5	28	122	3
Lenovo	1	1	5	2	2	1	1	13	67	5

資料來源：小組(九人)投票-每人每格一票

產品定位圖(消費者觀點)


價格便宜
acer
抵消
優勢
ASUS
品質可靠
行銷
品質
hp invent
lenovo
SONY
價格便宜
acer
ASUS
服務好
行銷
服務
hp invent
SONY
lenovo
價格便宜
acer
ASUS
外觀佳
lenovo
hp invent
SONY
價格便宜
acer
ASUS
品牌優勢
lenovo
hp invent
SONY

HP 全球佈局

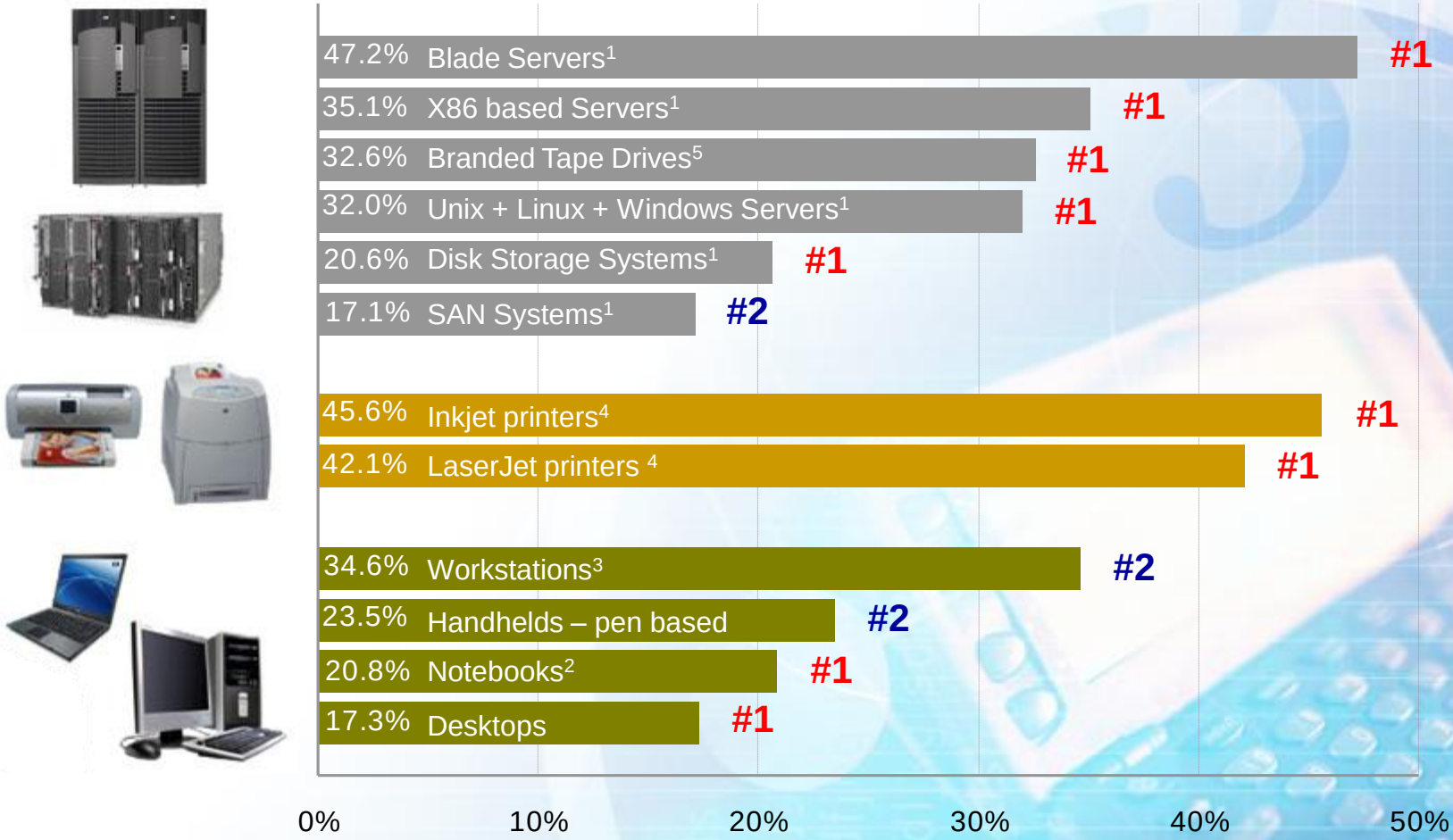
HP operates in more than 170 countries around the world

- 產品研發中心
  - Taiwan
  - U.S.
  - U.K.
  - Israel
  - Japan
  - India
  - China
  - Most recently: Russia

HP 完整的產品組合

HP 產品市場佔有率

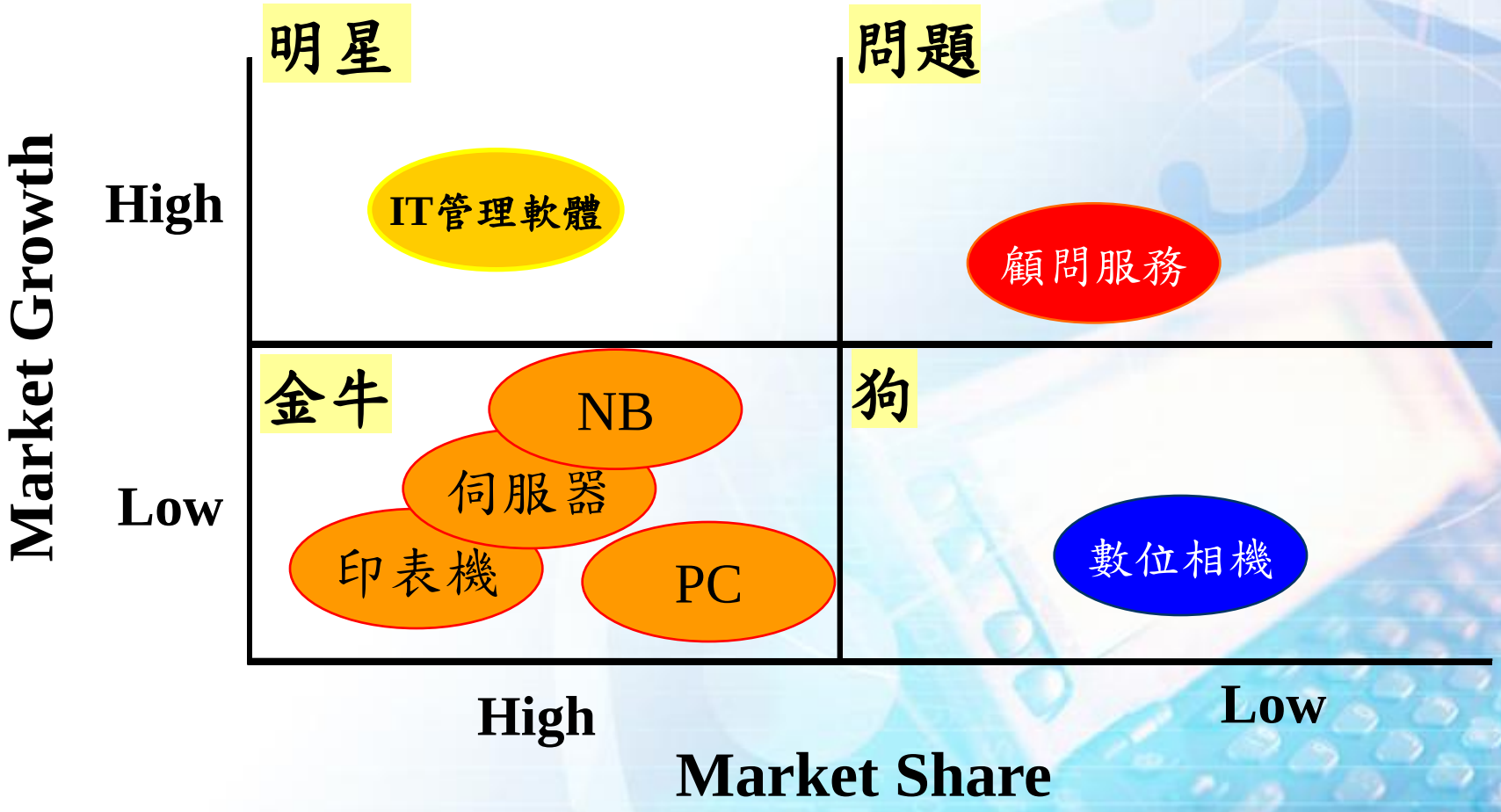
Worldwide data for calendar CQ2 2007



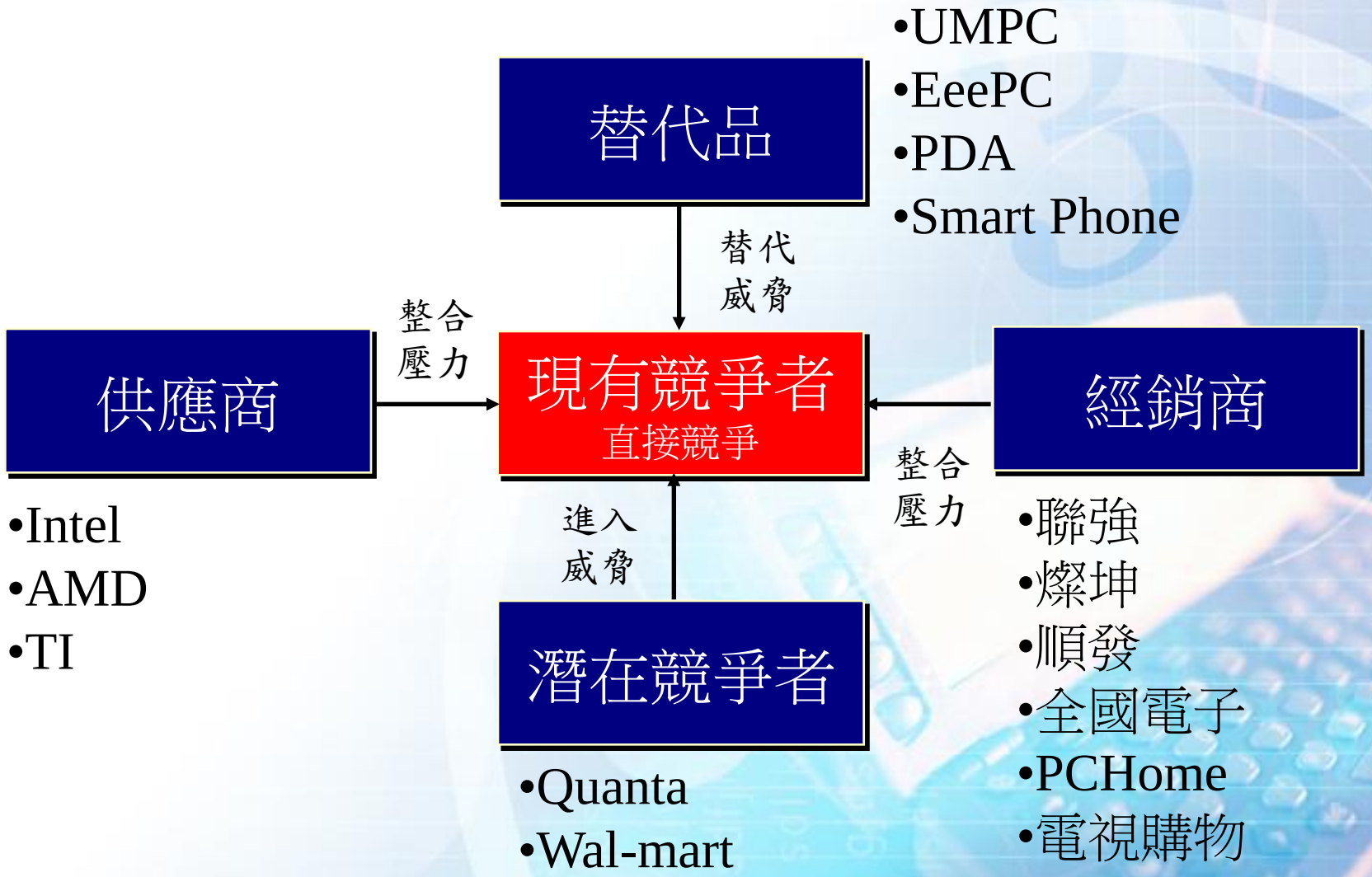
[1] Factory Revenue; Other percentages are units
[2] Classified as "portables" by IDC
[3] Includes PWS Desktops, PWS Mobile and RISC workstations
[4] Includes color and monochrome; single and multifunction excluding SFDC
[5] Branded Tape Drive revenue from Worldwide Branded Tape 2006 Vendor Analysis IDC #206511

資料來源：IDC Q2 2007 worldwide data

HP BCG矩陣分析


明星
問題
High
IT管理軟體
顧問服務
金牛
NB
狗
伺服器
Low
印表機
PC
數位相機
High
Low
Market Share
Market Growth

HP競爭力分析(五力)


替代品
•UMPC
•EeePC
•PDA
•Smart Phone
替代威脅
整合壓力
供應商
現有競爭者
直接競爭
經銷商
整合壓力
•Intel
•AMD
•TI
進入威脅
潛在競爭者
•Quanta
•Wal-mart
•聯強
•燦坤
•順發
•全國電子
•PCHome
•電視購物

Company Overview

The Scoop

Growth Target

Overtake Lenovo

Big Move

acer The Value of Design

Design as differentiator

Big Bet

China and US

Acer's marketing strategy and advertising approach are focused and aligned

Latest First

Acer is selling a good product – primarily notebooks - latest technology, cutting edge design, innovative features, high specs etc. at a low price.

Everyday Low Prices

The emphasis is on products, specs and prices. Acer will from time to time offer limited time value added deals but the primary sell is well speced products at a low price.

Acer does not try and match Dell's "deals/bundles/offers" primarily because it is too expensive and difficult to manage through the channel.

Acer seeks to up-sell extended warranty service plans.

Channel Preference

Sell **exclusively** through resellers with a focus on key distributors.

Everything Acer does supports its channel partners. This limits Acer's ability to play the promotional/deal game. Acer relies on the channel to "push" it's products and it gives extra margin to make this happen

Mix and Match

Acer produces 2 FSIs every other month (AMD models and Intel models) featuring that period's "Hot Buys".

Acer is efficient using a template driven in-magazine catalog that can also used as an FSI or can be pooled out into single pages, spreads etc.. Acer exclusively targets buyers and focuses its advertising to drive sales of select models

Acer seeks to make product design a differentiator.

In Spring/Summer of 2007 Acer introduced new designs developed by BMW Designworks USA for its notebooks. Design has now become a major "reason to buy" and a focus of Acers' advertising.

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- 問題與討論

HP對Acer的SWOT分析

優勢

- 售後服務制度完備，24hrs客服在假日也能通
- 網路銷售資訊完整
- 產品品質佳
- 產品線及服務完善，對企業用戶可提供整體解決方案

劣勢

- 品牌形象比以前差，市場指名度低於Acer
- 品牌形象不夠強烈，價格也沒有優勢
- 同規格產品的合理售價比Acer高

機會點

- 上班族對於服務及品質要求都較高，若能在服務方面加碼，將比Acer有優勢
- 目前經銷商銷售HP的利潤不差，經銷商願意多推薦
- 原康柏在筆記型市場形象極佳，HP若能強化原來Compaq的形象，有機會讓想買Acer的消費者回頭

威脅點

- 維修據點比Acer少，加上消費者的忠誠度正在逐漸降低，促使消費者改買Acer
- 客戶指名購買的比例偏低，需靠經銷商的門市人員推薦
- 品牌努力不夠，讓西瓜偎大邊的效益越來越明顯

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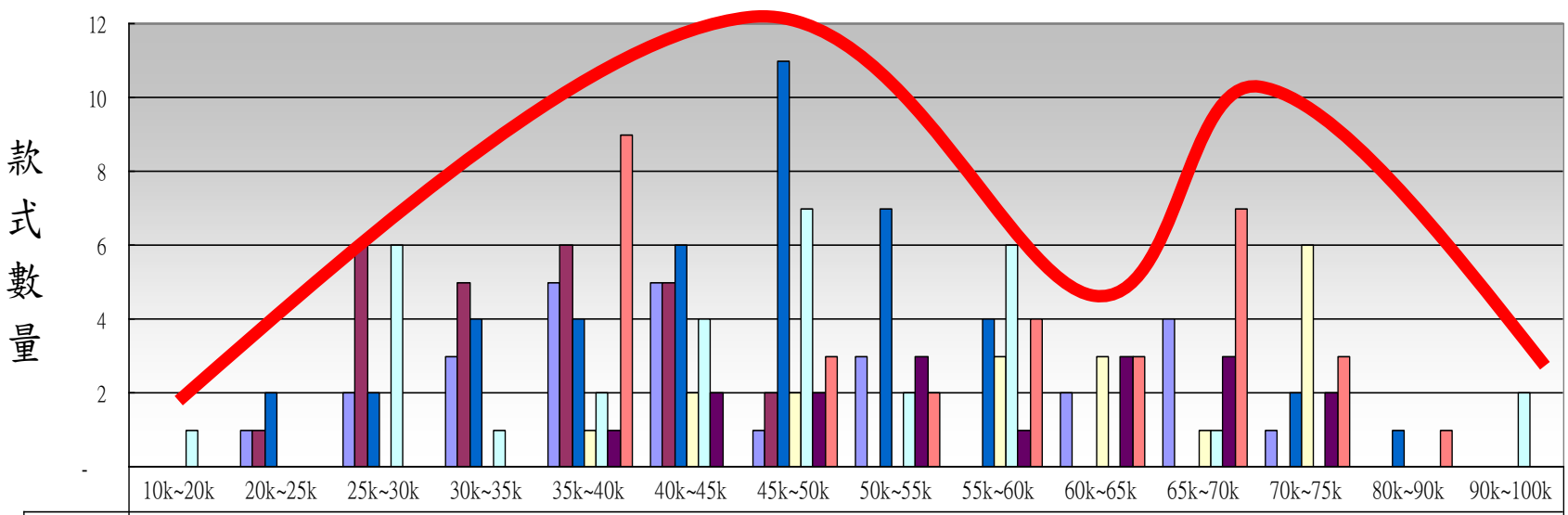
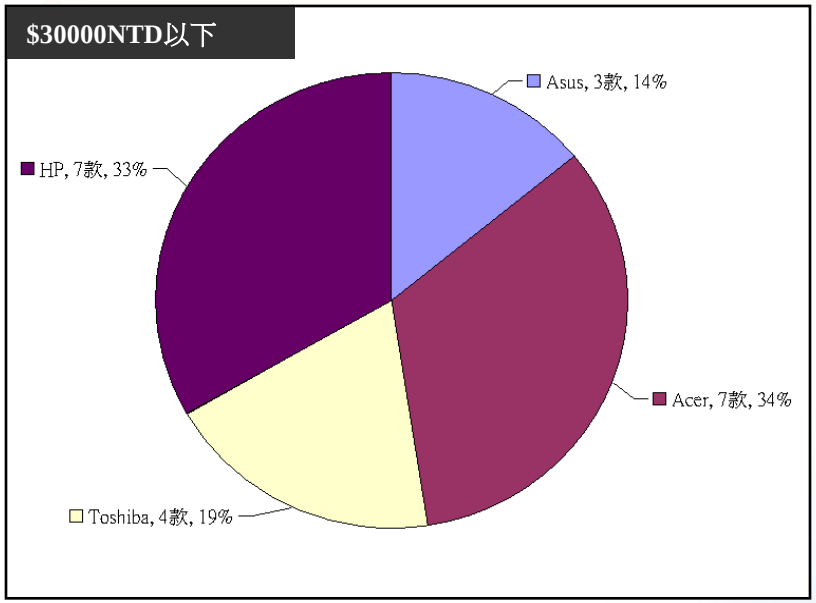
台灣NB各品牌款式及價格分佈圖

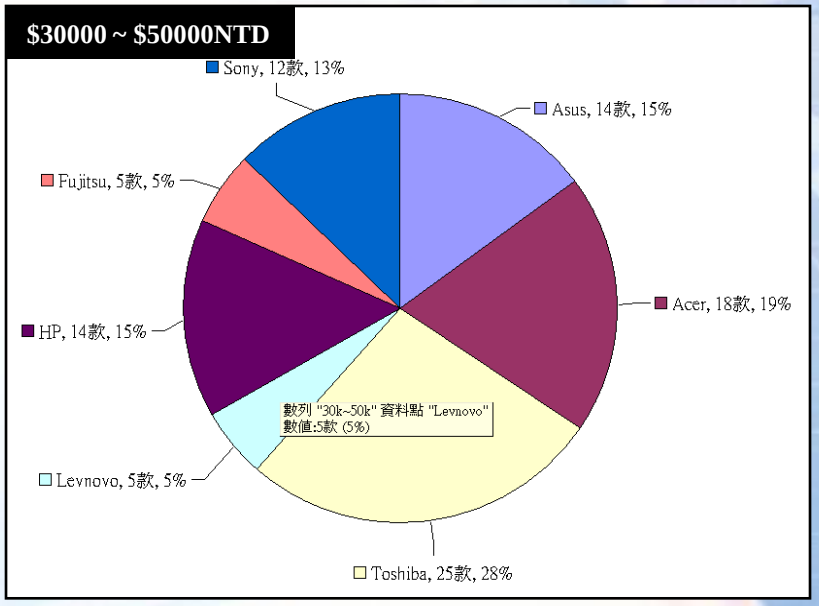


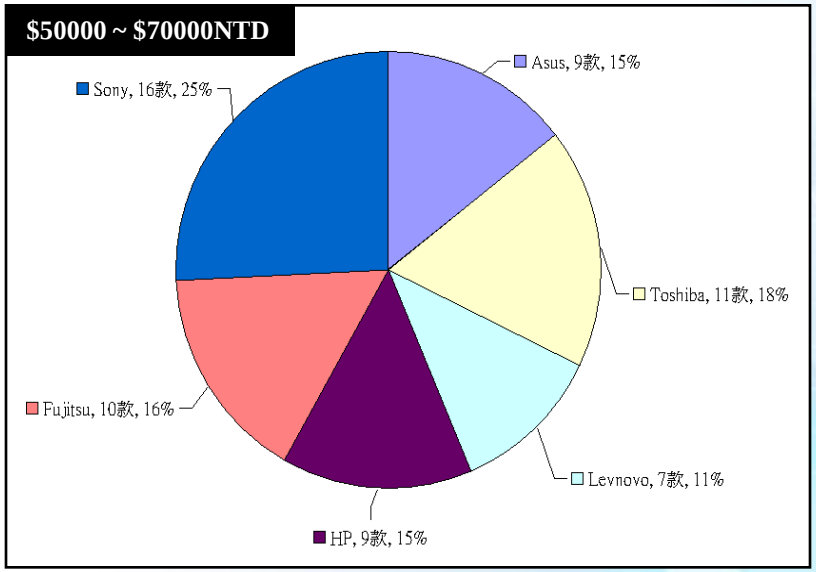
	10k~20k	20k~25k	25k~30k	30k~35k	35k~40k	40k~45k	45k~50k	50k~55k	55k~60k	60k~65k	65k~70k	70k~75k	80k~90k	90k~100k
Asus	-	1	2	3	5	5	1	3	-	2	4	1	-	-
Acer	-	1	6	5	6	5	2	-	-	-	-	-	-	-
Toshiba	-	2	2	4	4	6	11	7	4	-	-	2	1	-
Levnovo	-	-	-	-	1	2	2	-	3	3	1	6	-	-
HP	1	-	6	1	2	4	7	2	6	-	1	-	-	2
Fujitsu	-	-	-	-	1	2	2	3	1	3	3	2	-	-
Sony	-	-	-	-	9	-	3	2	4	3	7	3	1	-

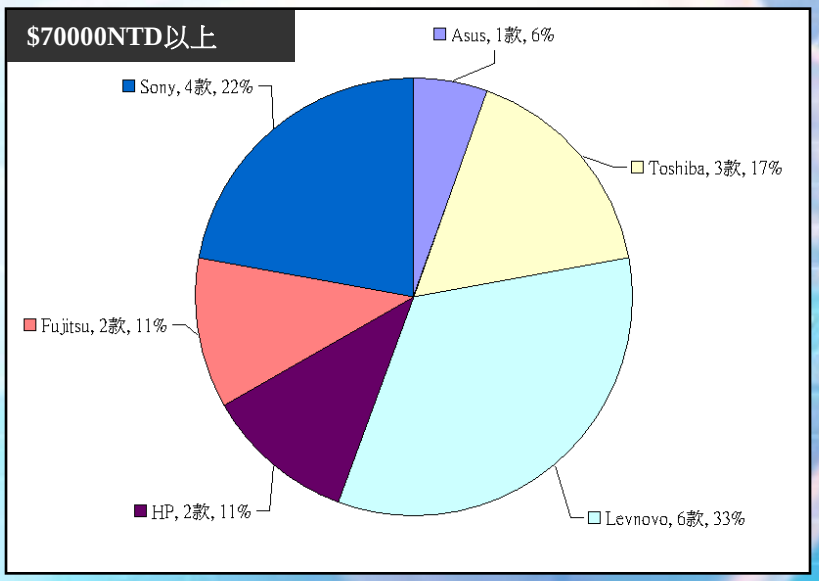
價格區塊

台灣各品牌筆記型電腦價格分析









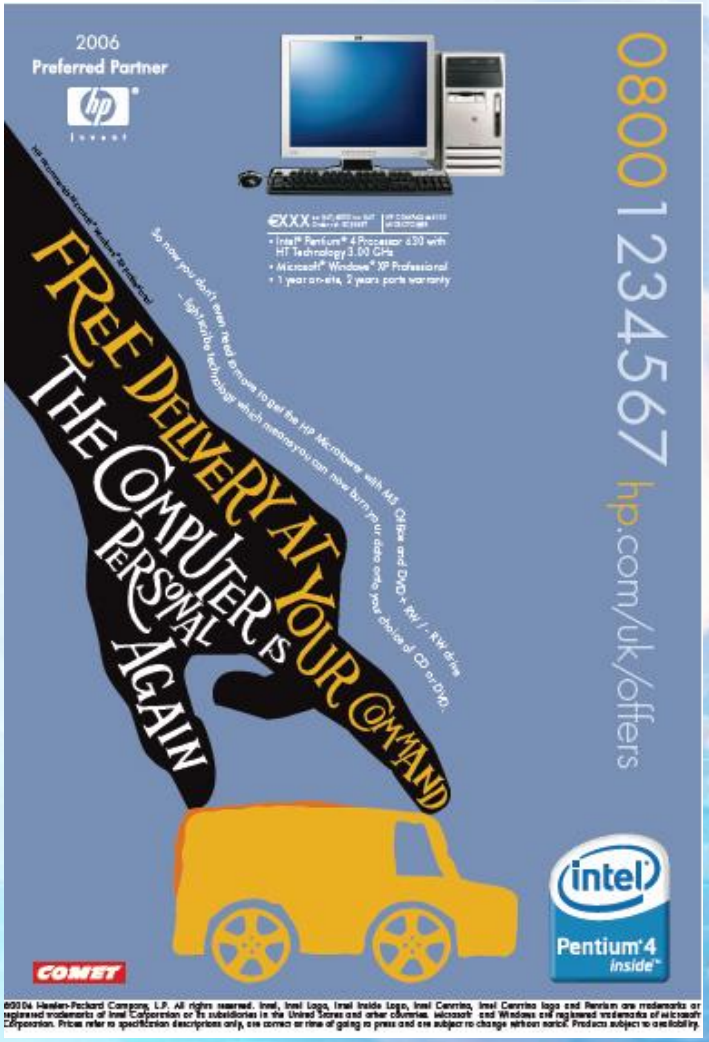
HP行銷決策思維1: 確認目標市場與顧客

2006Q2以後

目標: 更貼近消費者市場

HP行銷決策思維2: 確立行銷主軸 – *" The Computer is Personal Again"*

目標→提昇個人購買(Consumer)市場佔有率



HP行銷決策思維3:重現COMPAQ品牌形象 – 搶攻消費者市場

原康柏在筆記型市場形象極佳，HP藉由重現COMPAQ的品牌形象，搭配更優惠的價格，讓想買Acer的消費者回頭，抵消Acer在價格方面的吸引力。

HP行銷決策思維4: 雙品牌策略 – 搶攻與兼顧

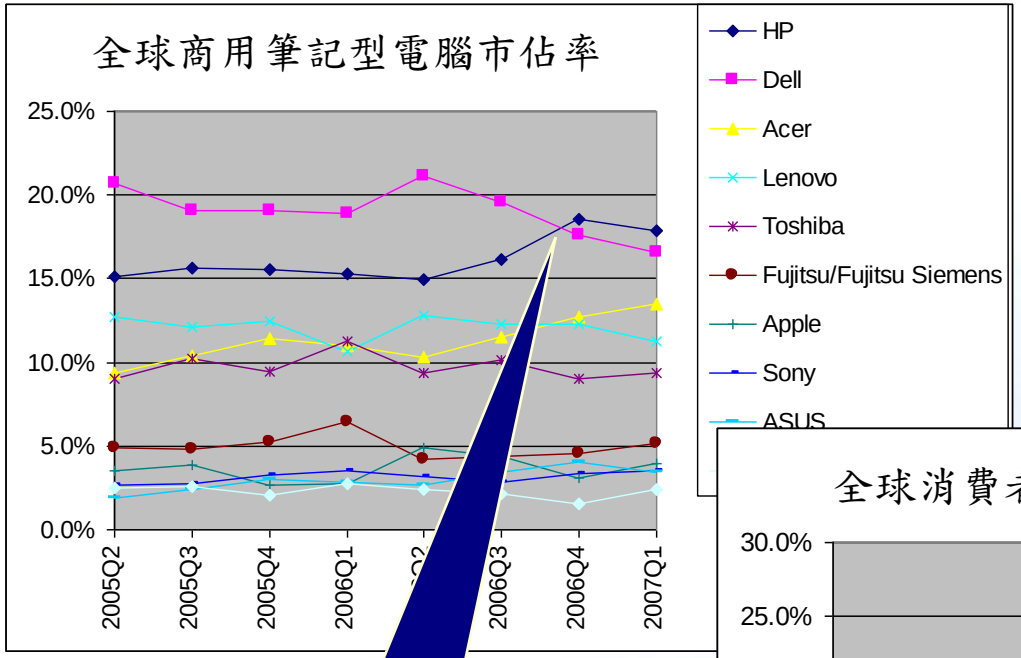
HP品牌主打商用市場

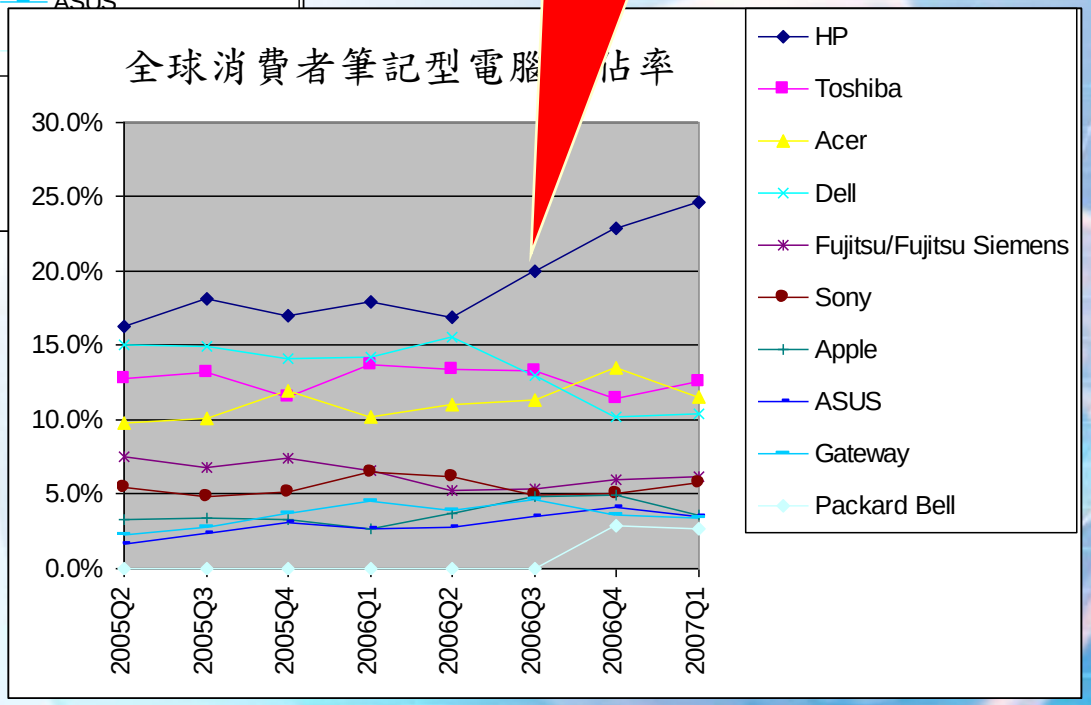
COMPAQ品牌主打消費者市場

"The careful segmentation of Compaq- and HP-branded PCs is a win-win for HP that creates differentiation and opens up opportunities."

HP行銷決策思維5：行銷既有優勢

後記: HP雙品牌策略奏效





消費者市場市佔率在2006Q2後快速攀升

商用市場市佔率也同樣逐漸提高

資料來源：IDC Q1 2007 worldwide data

結語

紅海突圍、開創藍海

問題與討論 - 歡迎批評指教^_^!

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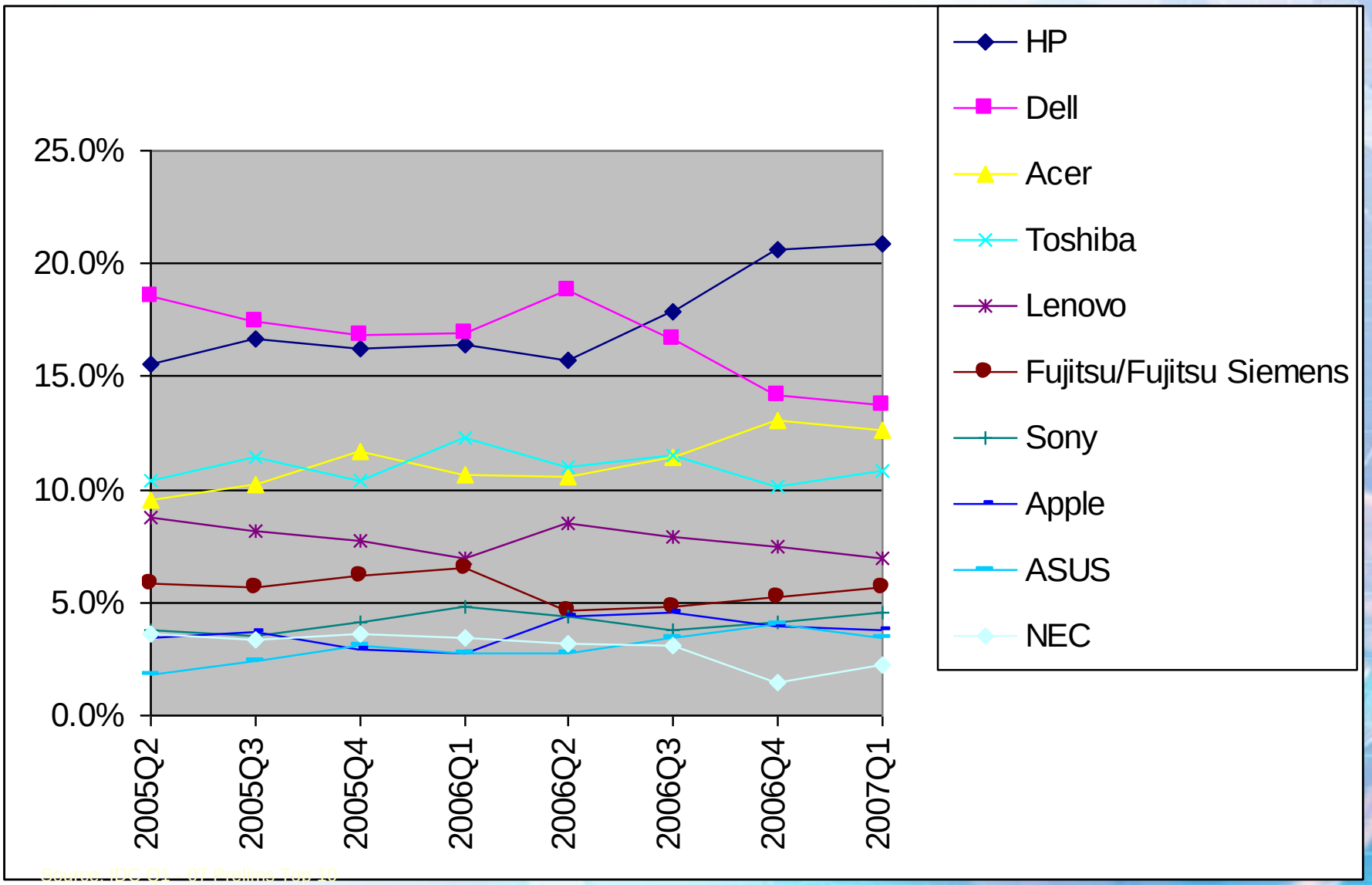
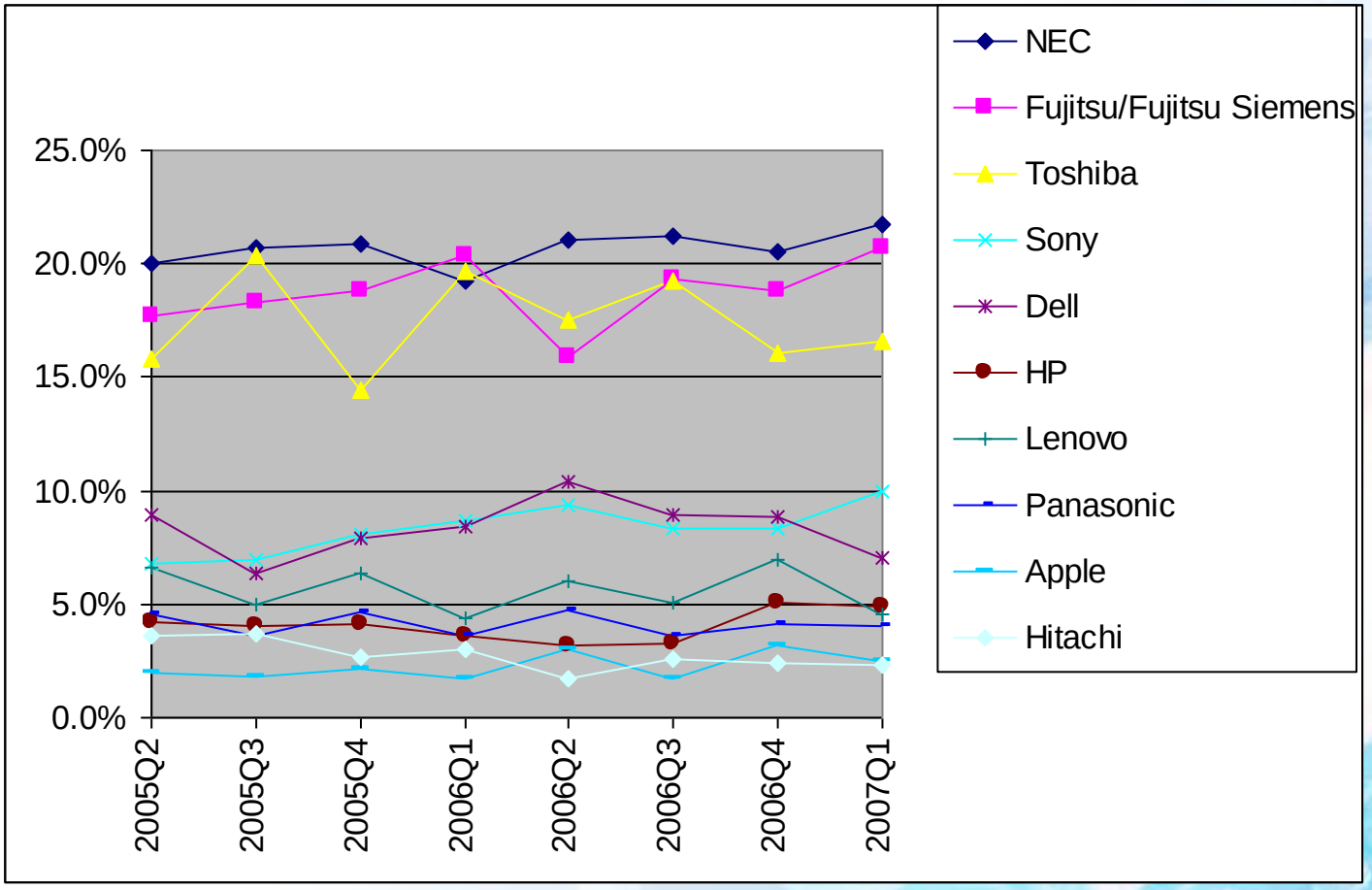
參考資料

全球筆記型電腦市佔率變動



Source: IDC Q1 – 07 Prelims top 10

筆記型電腦市佔率波動分析-日本

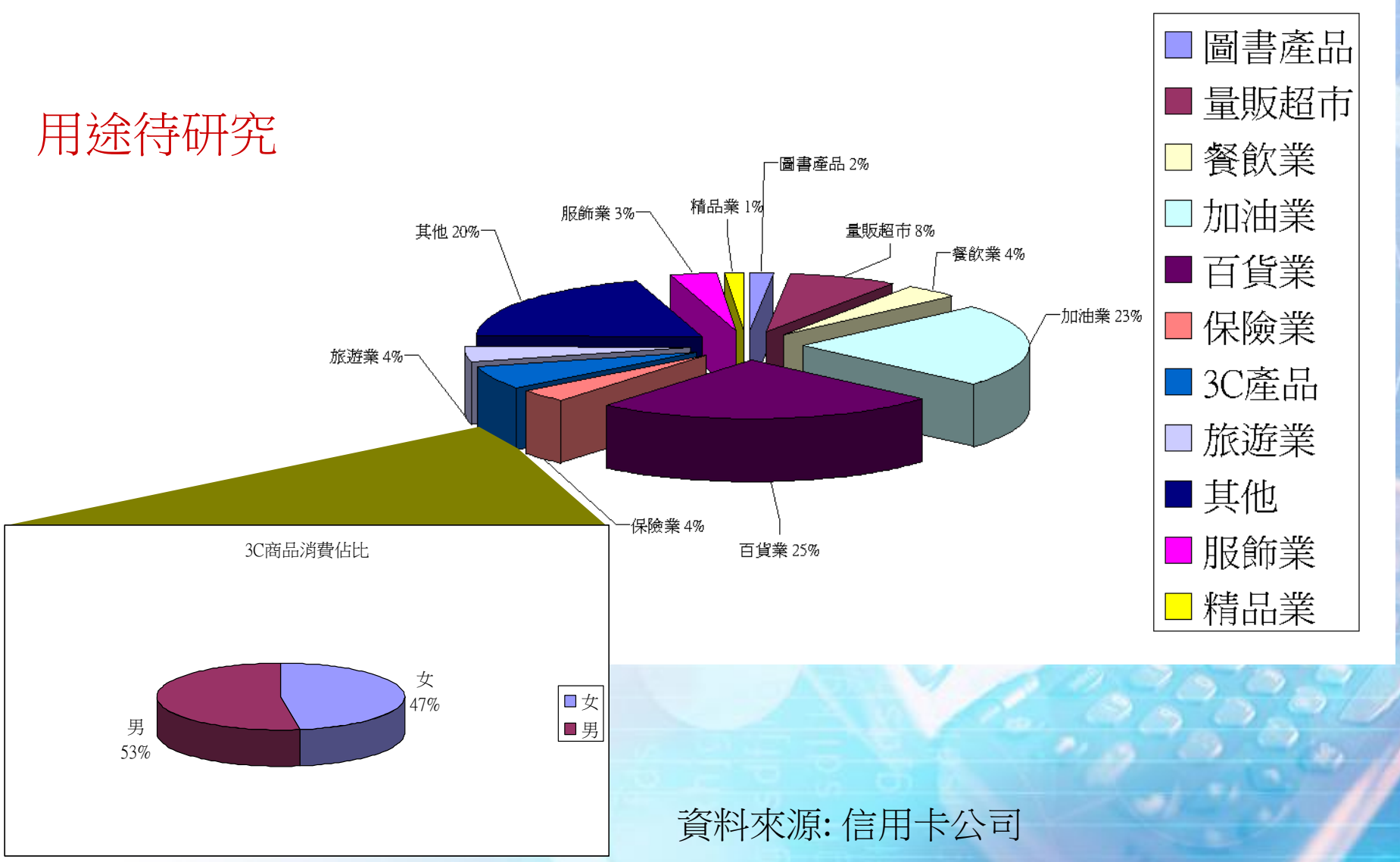


我就是愛
用國貨啦!

>> Back

台灣3C商品信用卡消費人數佔比

用途待研究



資料來源: 信用卡公司