



聚焦臺北—全民瘋「萌」 行銷設計軟實力

■ 聚焦臺北

城市行銷新「萌」主：因為生活壓力帶來的挫折感，讓現代人急需可以紓壓、解悶的管道，使得具有療癒人心作用，可以紓壓、解悶的「萌」事物愈來愈受到歡迎，即使是城市行銷，也難擋這股「萌」經濟的可愛力量。作者舉了兩個城市行銷的實際案例—日本熊本縣的熊本熊、巡迴至高雄展出的黃色小鴨，說明如何應用角色行銷，成功移轉消費者的喜好心情至該城市形象上，並進一步善用數位影響力，將行銷收益極大化，為城市創造高能見度與高人氣；最後並提出實際操作模式，建議臺北市如何應用貓熊寶寶圓仔完美結合城市行銷，為城市形象再加分。

挖掘萌元素 觸動人心的軟行銷：品質較好的產品與吸引人的價格，通常是大受消費者歡迎的主要原因，然而萌行銷的「逆襲」，卻充分印證右腦感性行銷的威力。作者引用「日本創意·萌經濟」書中的宅性十大原則，說明如何

應用軟性行銷抓住消費者的心；此外，更以日本晨間連續劇「海女小天」為例，剖析萌元素如何振興地方經濟，創造出龐大商機。最後，建議臺北市在成功獲選「2016世界設計之都」之後，應把握良機善用右腦打造知覺形象，讓整個城市更可愛親切、形象大加分。

數位科技上手 創造力「萌」生：緣自於動漫文化的「萌」文化，近年來搭配著多元行銷策略，為數位科技產業創造無限「萌」商機，從數位遊戲領域到動漫畫領域與行動應用領域，本土廠商自發性的創意能量不斷在累積，成為臺灣數位內容產業的成長動能。在未來推動上應著重遊戲產品跨平臺發展、電腦動畫一源多用、App微應用收費模式多樣化等方向努力，加速數位內容發展乘數效果，讓臺灣的軟實力成為國際矚目之重要推廣與試煉場域，並擴散到國際上各地區廣泛應用。

城市萬花筒

■ 臺北·最前線

花博公園真好玩 創造設計新視野：花博公園自2013年11月至2014年3月繽紛舉辦長達五個月「萬花節」，這也是繼花博後，最大的花卉饗宴，「萬花節」分四大花卉園藝展覽，接力登場的展出活動分別是「戶外景觀設計大賽」、「愛與芬芳國際花藝設計大賽」，「花卉裝置藝術設計大展」及「臺北花卉展」等，這些花藝設計者來自世界各地的花藝專家，攜手讓花博公園再次呈現花團錦簇的美麗與芬芳，彰顯臺灣花藝設計的驚人實力，除了萬花節外花博公園更報導具有奇幻氣氛百鬼出沒的萬嚇節系列活動。

設計臺北 創意空間無限可能：為推動數位內容產業發展，臺北市政府產業發展局自2010年起每年舉辦「臺北數位內容設計競賽」，2013臺北國際數位內容設計競賽，參賽作品來自全球45個國家，總計1,024件，決選自各組別中，選出金、銀、銅獎，以及「臺北特獎」及「全

場大獎」二項特別獎，此次競賽廣受世界好手重視，佳評不斷。除了舉辦國際競賽外，臺北市亦正朝向國際一流的創業都市發展，特別於內湖科技園區高科技人才及專業團隊匯集之地，創立「臺北創新實驗室」，提供設計工作者工作場地，與創業者需要的顧問諮詢、創投媒合等。

臺北好設計 發揮實力展創意：有鑒於設計加值之世界潮流，臺北市政府特別規劃「臺北市創意暨設計產業發展計畫」，希望藉由「臺北設計獎」獎勵創新點子以及「臺北好站」行銷臺北市內優質設計店家予國內民眾，進行設計生活之體驗，推廣臺北設計之都印象予國際。2013年的臺北設計獎共吸引來自45個國家，共4,001件作品參賽，創歷屆紀錄，更成為國際間設計界的盛會。而隱身於城市巷弄間的設計美學店家，「臺北好站」也將於本期介紹給大家。

Focus Taipei

■ Focus Taipei

Rising star of city marketing: Due to frustrations in life, modern people desperately need channels to unwind and release pressure. As a result, stress-relieving "cute" objects are becoming increasingly popular, and the adorable force of the "cuteness" economy has become unstoppable. Through two case studies of city marketing: Kumamon in Kumamoto-ken, Japan and the Rubber Duck Taiwan Tour in Kaohsiung, the author explains how character marketing is applied to successfully transfer consumers' fondness onto the city's image, and further capitalize on the influence of digitization to optimize marketing benefit, thereby creating high visibility and popularity for the city. Finally, an actual operating model will be proposed to recommend Taipei City how to combine Panda cub Yuan Yuan with city marketing seamlessly, in turn enhancing the city image.

Discover "cuteness" element-touching soft marketing: A good quality product combined with attractive price is the primary reason for its consumer popularity. However, "cuteness" marketing's counterattack fully exemplifies the power of right brain sensibility marketing. The author quotes the ten major principle of Otaku in the book "Japanese Creativity-Cuteness Economy" to explain how to apply soft marketing to capture the consumers' hearts. In addition, he also uses Japanese drama series Amachan as an example to

analyze how the cuteness element is able to revitalize the local economy and create immense market opportunities. Lastly, the author recommends that after being selected as the 2016 World Design Capital (WDC), Taipei City should capitalize on right brain marketing to generate sensory images and make the city more adorable and amiable, thereby enhancing the overall image significantly.

Digital technology- "cuteness" creativity: Originating from anime, the "cuteness" culture has been combined with diverse marketing strategies to create infinite "cuteness" market opportunities in the digital technology industry, ranging from digital games, anime to mobile apps. Voluntary creative energy of domestic businesses is constantly accumulating to form the driving force behind the Taiwanese digital contents industry. In terms of future promotion, focus should be placed on diverse directions such as cross-platform game product development, One Source Multi-Use (OSMU) of computer animations, micro App payment model etc. in order to accelerate the multiplying effect of digital content development. The aim is to make Taiwan's soft power an internationally recognized promotion and testing ground, in turn propagating it to extensive application areas throughout the world.

City Kaleidoscope

■ Taipei Frontline

Exciting Taipei Expo Park – create new design perspective: From November 2013 until March 2014, the five-month long "Blossom Festival" will be held at the Taipei Expo Park. This is the largest floral exhibition since the Taipei International Flora Exposition. The "Blossom Festival" is divided into four horticulture exhibitions, including: Outdoor Landscape Design Competition, International Flower Design Award, Floral Art work Exhibition and Taipei Flower Show etc. The floriculture experts come from all over the world to re-create the beauty and fragrance of blooming flowers at the Taipei Expo Park; together, they will highlighting Taiwan's astonishing prowess in floriculture. Besides the Blossom Festival, Taipei Expo Park is reported to be organizing a series of Halloween activities featuring scary ghosts and eerie ambiance.

Design Taipei – infinite possibilities of creative space: In an effort to promote digital content industry development, the Department of Economic Development, Taipei City Government has organized the annual Taipei International Digital Content Awards since 2010. For the 2013 Taipei International Digital Content Awards, 1,024 submissions from participants in 45 countries worldwide were received. Gold Award, Silver Award, Bronze Award and two special awards: Taipei Special Award and Grand Prix will be selected from each category. The competition is well known and well

received throughout the world. In addition to organizing international competitions, Taipei City is also striving towards the goal of developing into a top creative cosmopolis; therefore, the Taipei Co-Space was established in Taipei Neihu Technology Park – a converging place of high-tech talents and professional organizations. Besides offering a venue for designers, Taipei Co-Space also provides services such as consultation and venture capital matching.

Taipei great design – unleash boundless potential and creativity: In light of the value added design global trend, the Taipei City Government has especially devised the "Taipei City Creative and Design Industry Development Plan". Innovative ideas are encouraged through the "Taipei International Design Award", while the objective of a "Good Shop in Taipei" is to market Taipei City's outstanding design studios to the Taiwanese people so that they can experience design in everyday life and ultimately promote World Design Capital image to the international community. The 2013 Taipei International Design Award attracted 4,001 submissions from 45 countries to set a new record, making it a grand event among the international design community; moreover, Good Shop in Taipei will also introduce all the design and aesthetics studios hidden in the small alleys of the city to everyone in this issue of Taipei Economic Quarterly.

■ 國際城市快遞

動漫遊戲的人間天堂—秋葉原：由於消費文化的移轉，讓80年代曾經是家庭電器重鎮的秋葉原，時至今日早已變身為動漫遊戲產業的人間天堂。因為御宅族的興趣意向與消費需求，讓秋葉原成為「萌」文化的起源地，女僕咖啡廳更可以說是萌文化下最具代表性的產物。2011年日本動畫產業的銷售額為1.33兆多日圓，

占日本GDP的比重超過10%，已成為日本第三大產業，秋葉原的經典地位不容忽視。本文將探討動漫遊戲從次文化走向引領全國經濟發展的重要產業之一，秋葉原店家經營策略的快速轉變，以及產業分工的成熟專精，值得各城市參考學習。

臺北競爭力

全球金融中心 臺北市服務升級：本期引用由大陸新華社旗下中經社，聯合標普道瓊指數公司共同研發的「國際金融中心發展指數」，於2013年9月公布的最新調查結果顯示，臺北的綜合競爭力上升至第30名，與2012年相較進步了6名，且是連續第三年上升；在「產業支撐」、「服務水平」、「國家環境」等三方面較去年

進步，其中「服務水平」更是受到肯定，進而拉動「綜合競爭力」得以爬升至第30名。此外，參考天下雜誌於2013年9月公布的「2013幸福城市—城市競爭力調查」，臺北市拿下經濟力、環境力、及文教力三個面向的第一，獲得656.44的高分，輕鬆蟬聯冠軍。

經濟觀測站

■ 國際經濟情勢分析

過去長達了5年的全球經濟與金融危機，終於得到往上牽引的一股強大拉力，包含全球最大、最重要的兩個經濟體—美國與中國大陸，在2013年第3季的表現都出乎意外的好。且經過幾年的動盪與調整，未來前景已變得更加穩定，EIU預估2014年美國、歐元區以及日本GDP成長率合計占比將達到全球的一半，也是4年以來首度同時成長；且隨著全球需求回升，新興市場也預估將有更好的表現。

■ 亞洲城市動態—東京、新加坡、香港、上海

東京2013年9月工業生產指數較8月下降5.1%，9月消費者物價指數較8月成長0.2%，9月平均薪資較2012年同期增加0.4%，2013年第3季失業率為4.3%。新加坡2013年第3季GDP較2012年同期成長5.8%，2013年9月失業率降至1.8%，工業生產指數則較8月成長3.7%，消費者物價指數較2012年同期上揚1.6%。香港2013年第3季GDP較2012年同期成長2.9%，2013年9月消費者物價指數較2012年同期上揚4.6%，2013年第3季經季節性因素調整的失業率為3.3%。上海2013年9月消費者物價指數為102.5，與2012年同期相比上升2.5%，外商直接投資合同項目較2012年同期下

滑9.6%，第三產業投資比重占絕對主導地位。

■ 從香港與新加坡的經驗看海峽兩岸服務貿易協議

隨著全球與區域經濟發展程度上升，服務部門在貿易活動中也愈形重要。本文從香港與新加坡兩個服務貿易大國在推動服務業輸出與輸入外資及人才等兩方面的政策取向，為我國中央部會與臺北市政府，提供規劃兩岸服貿協議之因應措施參考。對於我國中央部會最重要的啟示，在於國家「核心戰略」的定位；另一方面對於臺北市政府來說則應善用相關政策工具，提供適當的財政支援與在職訓練。

■ 國內經濟情勢分析

受到國際景氣低瀾影響，礦產品及光學器材等出口卻呈現衰退，出口較2012年同季微幅減少0.80%，商品及服務輸出則較2012年同期成長1.69%；民間投資方面，雖然雖軌道車輛等大宗運具進口增加，但一般企業投資力道仍顯疲弱，半導體主要廠商資本支出呈現趨緩之態勢，第3季資本形成較2012年同期實質成長0.82%，2013年經濟成長1.74%。

產經臺北

■ 臺北產經動態分析—2013年第3季

2013年第3季消費者物價指數年增率上漲0.30%，營建動態部分建照核發與建照使用在坪數的改變形成強烈的對比。所得層面不受國際局勢之影響，2012年平均每戶可支配所得為127.83萬元，較2011年增加2.14%。此外，第3季臺北市觀光產業表現持平，受到日幣貶值之影響，日本遊客來臺人數卻呈現負成長，導致客房住用率較2012年同期下滑2.01個百分點，跌幅較前一季收斂。投資動能方面，受到全球景氣動盪，歐洲經濟疲弱、中國大陸成長動能停滯、美國國債問題等，都直接影響僑外投資的規模，2013年第3季僑外投資金額年增率負43.46%。

■ 臺北市企業營運信心調查—2013年下半年

依本期刊於11月上旬至11月中旬期間所進行的臺北市企業營運信心調查結果，對於景氣的判斷有45.13%的製造業廠商及50.23%的非製造業廠商對景氣看法持平，另有22.05%的製造業廠商與25.35%的非製造業廠商對未來景氣表示樂觀，進一步觀察未來六個月的廠商對景氣的看法，有21.13%的製造業廠商及24.09%的非製造業廠商認為未來景氣可能好轉，另有51.03%的製造業廠商及58.18%的非製造業廠商對未來景氣的看法表示持平，下半年景氣狀況仍需持續觀察。

■ Metropolitan Express

Paradise of anime and games – Akihabara: Due to the shift in consumption culture, Akihabara – which was formerly the hub of home appliance sales during the 80s – has become the paradise of anime and game industry. Akihabara is now the place of origin for "cuteness" culture, this is mainly attributed to the hobbies of otaku and consumer needs, and the maid café has become the most iconic product of cuteness culture. In 2011, Japanese anime industry exports amounted to more than 1.33 trillion Yen, constituting more than 10% of Japan's GDP, thus

making it the 3rd largest industry in the country. The classic status of Akihabara is not to be overlooked. The article will examine the progress of anime and games from being a sub-culture to becoming one of the most important industries in terms of Japan's national economic development. The rapid transformation of store management strategy in Akihabara, as well as the sophistication and specialization of the industry makes it the perfect example for other cities to study and learn from.

Taipei Competitiveness

Global financial center – upgrading Taipei City services: According to the latest survey results announced in March 2013 by Xinhua-Dow Jones International Financial Centers Development Index, developed by China Economic News Service – a subsidiary of Xinhua - in collaboration with S&P Dow Jones Indices, Taipei's combined competitiveness has risen to the 30th place. This is an improvement of six places compared to 2012 and also the third straight improvement over the past three years. The city improved in terms of "industrial

support", "services" and "general environment"; in particular, "services" was highly commended and pulled up the city's combined competitiveness to the 30th place. In addition, in reference to CommonWealth Magazine's 2013 City Happiness & Competitiveness Survey published in September 2013, Taipei City snatched 1st place in terms of Economic Vitality, Environmental Protection and Culture & Education. With a combined score of 656.44, Taipei City successfully defended its title.

Economic Observatory

■ International Economic Overview

After the global economic and financial crisis over the past five years, there is finally a powerful lifting force demonstrated by two of the largest and most important global economic entities: USA and China, both exhibited surprisingly good performances in 2013Q3. After several years of turbulence and adjustments, the future outlook has become more stable. According to EIU's estimates, the combined GDP growth rate of USA, Eurozone and Japan will constitute roughly half of that of the world in 2014. This is also the first time in four years that they have exhibited concurrent growth. As global demands pick up, emerging markets are expected to exhibit improved performance.

■ Asian City Overview—Tokyo, Singapore, HK, Shanghai

Tokyo's September 2013 manufacturing production index declined by 5.1% compared to the previous month, the CPI in September increased 0.2% compared to the previous month, and the September average income increased by 0.4% (YOY) compared to the same period in 2012. In 2013 Q3, the unemployment rate was 4.3%. Singapore's 2013 Q3 GDP increased by 5.8% compared to the same period in 2012, the September 2013 unemployment rate declined to 1.8%, the manufacturing production index increased by 3.7% (YOY) compared to the previous month, and CPI increased by 1.6% (YOY) compared to the same period in 2012. HK's GDP growth rate in 2013 Q3 was 2.9% and CPI in September 2013 increased by 4.6% (YOY) compared to the same period in 2012. The unemployment rate in 2013 Q3, after seasonal adjustment, was 3.3%. Shanghai's CPI in September 2013 was 102.5, which increased by 2.5% (YOY) compared to the same period in 2012. The number of FDI contracts declined by 9.6%

(YOY) compared to the same period in 2012, with tertiary industry accounting for the highest percentage.

■ Examining Cross-Strait Agreement on Trade in Services by Experiences in Hong Kong and Singapore

As the level of development in global and regional economies rises, the service department is also becoming increasingly important. The article examines the policy orientation of two major trading nations, Hong Kong and Singapore, in terms of promoting exportation of their services industry as well as importation of foreign capital and talents. This thereby provides a reference for Taiwan's Central Government and Taipei City Government when devising contingency measures for the Cross-Strait Agreement on Trade in Services. The most crucial aspect for our Central Government is the positioning of the nation's Core Strategy. On the other hand, as far as Taipei City Government is concerned, the aim is to take advantage of related policy tools and provide adequate financial support and in-service training.

■ Taiwan Economic Overview

Influenced by the international economic recession, exports of mineral products and optical products in 2013 declined by 0.8% compared to the same quarter in 2012, while products and services exports have increased by 1.69% compared to 2012. In terms of private investment, although the import of rolling stocks increased considerably, average business investment still demonstrated weakness, and there is also a slowing down of main semiconductor manufacturers' capital expenditure. In Q3, capital formation grew by 0.82% compared to the same period in 2012, while the economic growth in 2013 is 1.74%.

Taipei Econ

■ Taipei Econ Overview – 2013 Q3

The year-on-year growth rate of CPI index in 2013 Q3 rose to 0.30%, while in terms of construction, the number of building permits issued and used form a stark contrast. Income is unaffected by global trends; in 2012, average disposable income of each household was NTD\$1.2783 million, an increase of 2.14% over 2011. In addition, Taipei's tourism industry performance remained even for Q3; influenced by the depreciation of the Japanese Yen, a negative growth has been exhibited for the number of Japanese tourists visiting Taiwan, in turn causing the hotel occupancy rate to drop by 2.01% compared to 2012, exhibiting a lower margin of decline compared to the previous quarter. In terms of momentum investment, impacted by global economic turbulence, Europe exhibited signs of economic weakening, China's growth became stagnant, and problems such as the US national debt all directly affect the scale of foreign investment. In 2013Q3, foreign investment annual growth rate was -43.46%.

■ Business Confidence Survey—2013 Q3~Q4

According to the Business Confidence Survey conducted from early November to mid-November by the Taipei Economic Quarterly, 45.13% of the manufacturing industry and 50.23% non-manufacturing firms believe the economy will remain unchanged, while 22.05% and 25.35% manufacturing and non-manufacturing firms hold an optimistic view towards the future outlook respectively. By observing the firms' perspectives on the economic outlook over the next six months, 21.13% and 24.09% manufacturing and non-manufacturing firms believe the economy will improve in the future respectively. In addition, 51.03% of manufacturing firms and 58.18% of non-manufacturing firms believe the economy will remain unchanged. Consequently, continued observation of the economy is needed in the next six months. 