



E-commerce Barometer 2021: Uncovering Southeast Asia (SEA) online shoppers & delivery preferences

By Ninja Van Group and DPDgroup



Let's get to know the SEA e-shopper.

Who are SEA e-shoppers?

The future is bright for SEA shoppers. Induced by the pandemic, the population is set for unprecedented growth...

~70 million

Have become e-shoppers since the pandemic in SEA

~380 million

Estimated number of e-shoppers in SEA by 2026

That's equivalent to the population size of the USA!

However, it is time to rethink who these SEA online shoppers are.

Across the SEA region, we are looking at a group of savvy and highly experienced online shoppers...



Regionally

70%

started online shopping over 2 years ago



Regional average

36

Years old

E-shoppers who started online shopping over 2 years ago*



63%



66%



63%



78%



77%



73%

Average age



34



35



36



36



37



36

*Based on DPD e-shopper barometer study; data gathered from over 9,000 respondents through fieldwork conducted in July 2021

...who are making high volume of online purchases and receiving numerous parcels on a monthly basis.

Annual number of purchases across all categories

Regional Average: **66**

 **52**  **58**

 **46**  **75**

 **58**  **104**

Commonly purchased categories in VN are FMCG and Fashion/Shoes

% share of online purchases (on total purchases, all categories)

Regional Average: **14%**

 **12%**  **15%**

 **14%**  **16%**

 **13%**  **15%**

of parcels received within the last month

Regional Average: **6.5**

 **6.5**  **5.9**

 **7.1**  **6.8**

 **5.5**  **7.1**

In the last 12 months, Ninja Van has delivered **around 2 million parcels** per day across the region!

Bargain hunting behaviour is a key driving factor for online shopping, and free delivery is one of the tactics to encourage online purchases.



72%

think online shopping
saves money



Currently, **quality online experience** (i.e. better service, better functionality, user experience) is **not** a priority

38%

Rated **free delivery** as a
key driver for buying online



**E-shoppers are heavily
reliant on online reviews to
assist in purchase decision
making and it's a two way
street: give me ideas on
what to buy and I'll share
my thoughts too!**



Regionally

81%

Choose websites
based on **social
media influencers**



78%



83%



72%



87%



80%



87%

Regionally

94%

Shared or published
feedback after
purchasing



99%



93%



85%



95%



94%



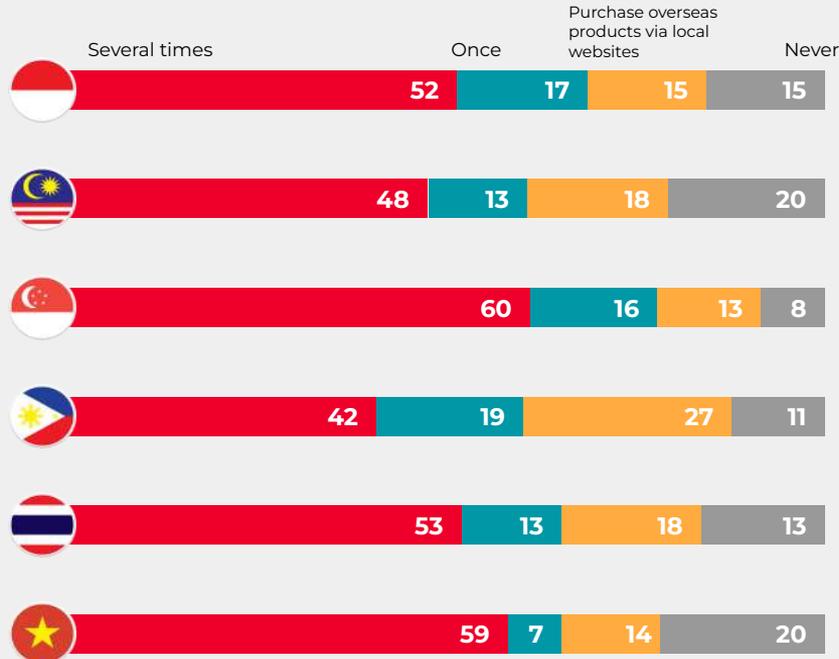
96%

In a hyper social environment, feedback is a form of currency that cannot be underestimated as more than half of the e-shoppers are likely to discuss their purchase via websites or app

		ID	MY	SG	PH	TH	VN
Publish comments and rate the product on the website/app itself	57%	54%	62%	49%	60%	53%	62%
Make recommendations to friends/family	36%	35%	32%	30%	39%	43%	38%
Publish comments and rate the product on social network	29%	29%	27%	20%	28%	35%	36%
Publish posts and pictures of my purchase on social networks	25%	27%	23%	18%	22%	31%	29%
No never	6%	1%	7%	15%	5%	6%	4%

As cross border purchases are already common across SEA, shippers are not limited to serving shoppers within their own country but regionally too!

Frequency of purchases from **foreign websites** (%)



Note:

- SEA covers Thailand, Vietnam, Singapore, Malaysia, Philippines
- Asia includes the SEA countries (point above), as well as China, Hong Kong, Taiwan, South Korea and Japan



Where do they purchase from?

(Respondents are allowed to select more than one country)

	SEA	ASIA	EU	US
Indonesia	47%	96%	9%	20%
Malaysia	41%	94%	14%	29%
Singapore	40%	91%	18%	50%
Philippines	37%	92%	9%	50%
Thailand	24%	96%	9%	26%
Vietnam	42%	91%	12%	42%

Only 1 in 3 consider cross border delivery to be easy and transparent, definitely has room for improvement!



Reasons for cross border online purchases

	Regional average	ID	MY	SG	PH	TH	VN
Find better deals overseas	58%	53%	69%	61%	55%	60%	52%
Don't have the products/brands/websites in my country	48%	34%	47%	48%	56%	48%	52%
Delivery/return options overseas have become easier & more transparent	29%	28%	22%	28%	24%	38%	36%
			Still needs to be addressed and resolved!				
Understand the language	19%	23%	14%	22%	12%	15%	27%



Now that we know who they are,
**Let's understand
their delivery
perceptions and
preferences...**

Home is where the heart is. This is the top location where e-shoppers prefer to have their parcels delivered to.

Delivery location preference					
	At home	At work	To a post office/ post station	Alternative address	Locker station
Regional average	79%	33%	14%	10%	10%
	77%	24%	6%	9%	5%
	71%	32%	27%	10%	6%
	79%	15%	12%	11%	17%
	89%	27%	6%	11%	4%
	81%	40%	10%	8%	6%
	74%	50%	15%	12%	11%



TH & VN also prefers having parcels delivered to their work location

One of the strongest delivery preference across SEA is real time delivery tracking. Beyond this, local preferences are mixed.

Delivery preference index - ranking

						
1st	Real time tracking	Real time tracking	Real time tracking	Real time tracking	Real time tracking	Delivery where I am located
2nd	Same day delivery	Delivery where I am located	Delivery where I am located	Delivery where I am located	Delivery where I am located	Real time delivery
3rd	Delivery where I am located	Advanced notifications (1hr ahead)	Option to reschedule	Advanced notifications (1hr ahead)	Know the exact one-hour window of the delivery	Several delivery options
4th	Several delivery options	Next day delivery	Several delivery options	Several delivery options	Same day delivery	Option to reschedule
5th	Advanced notifications (1hr ahead)	Know the exact one-hour window of the delivery	Ability to select timing in advance	Environ. Friendly delivery options	Option to reschedule	Same day delivery
6th	Environ. Friendly delivery options	Several delivery options	Advanced notifications (1hr ahead)	Option to reschedule	Ability to select timing in advance	Ability to select timing in advance
7th	Know the exact one-hour window of the delivery	Option to reschedule	Know the exact one-hour window of the delivery	Know the exact one-hour window of the delivery	Next day delivery	Advanced notifications (1hr ahead)

Providing an optimal delivery service is critical in building trust as majority of e-shoppers consider it important to know who the delivery company is.

89%

Consider it **important to know** who the delivery company is



Why it is important to know the delivery company (%)

If possible, I would like to choose one which **guarantees a good delivery service** 56

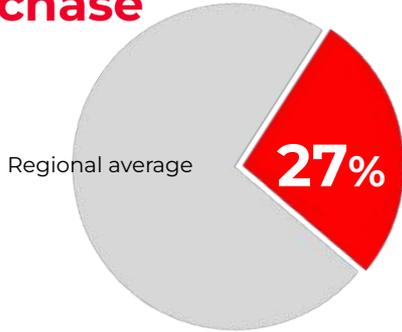
Provides **reassurance** 51

If possible, I would choose one which offers **environmentally friendly delivery alternatives** 38

I have my preferred delivery company 35

Had a previous **bad experience(s)** with a delivery company & would try to avoid them 35

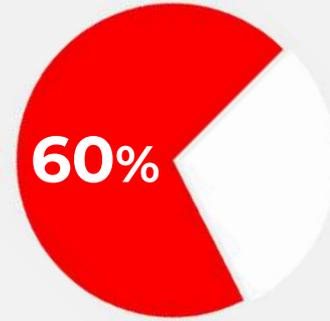
Not all parcel deliveries have been successful. 1 in 4 have returned their last online purchase



Which market makes the **most returns**?



...but about 2 in 3 considered the return experience to be **difficult**.



Which market **has the most difficulty**?



The markets which make the least amount of returns have the most difficulty with returns.



In Summary:

Key takeaways....

Understanding who the e-shoppers are:

It's time to **rethink** who SEA e-shoppers are. It is a cohort that are **digitally savvy, highly social and experienced** when it comes to online shopping. However, **deal seeking behaviour** is a key driver for online shopping. The premium experience is not yet materialised.

The appetite to purchase from **foreign websites** looks to grow in the future. It is a opportunity for **shippers to be regional players**.

However, **resolving delivery issues** is still important in order to maximise this opportunity.

Understanding their delivery perceptions and expectations:

Overwhelmingly, e-shoppers want their parcels delivered to their home address. **Real time delivery tracking** is one of the key delivery preferences.

Raising **brand awareness** is critical as it is a source of **service guarantee** and **reassurance**.

Although about 1 in 4 return their parcels, there is still opportunity to reduce difficulty when returning parcels.

Thank you!

