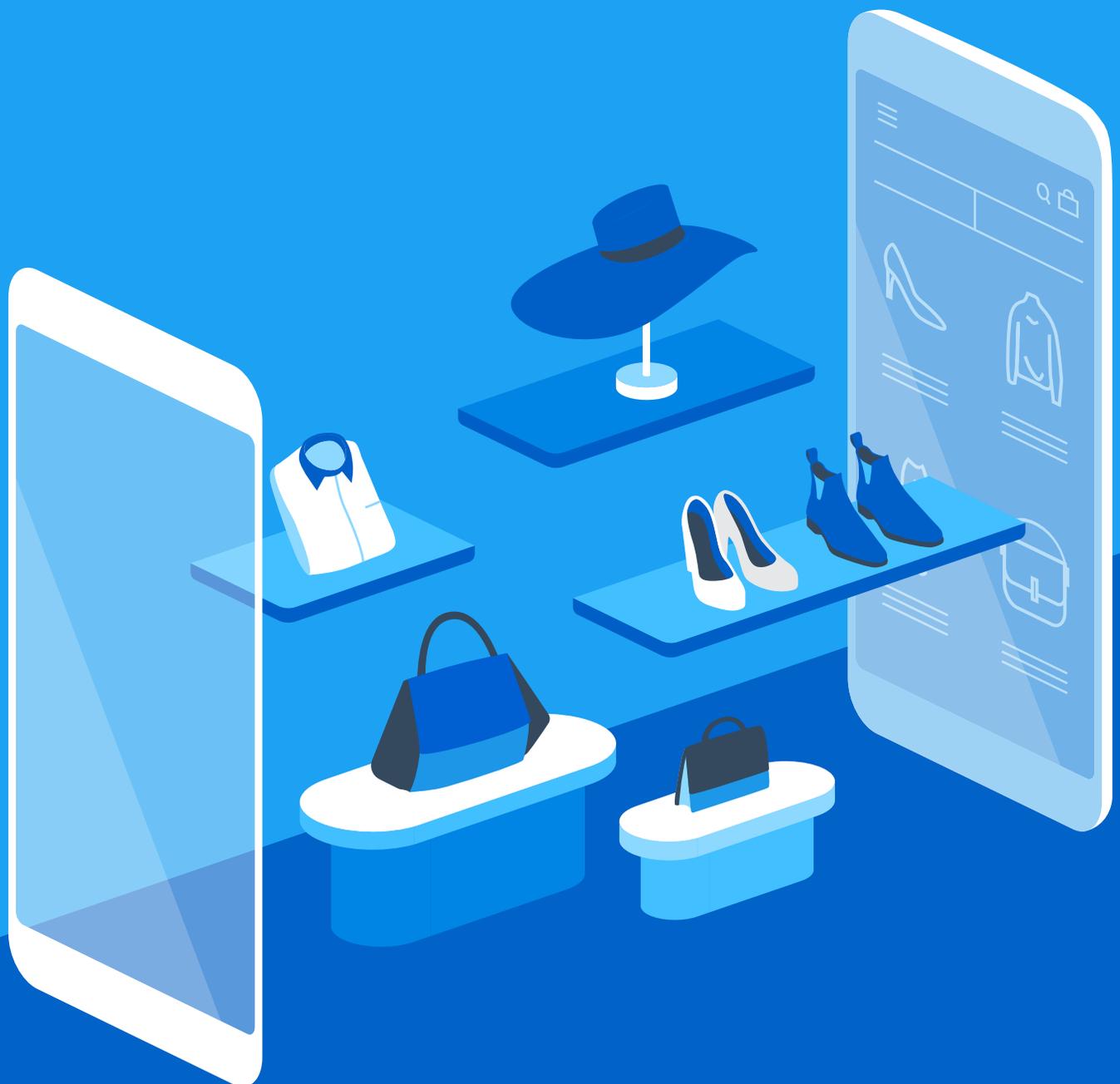




Mobile Commerce

Southeast Asia 2019 Edition





Global mobile commerce (Mcommerce) trends

1 Mobile is driving the growth of Ecommerce globally, with SEA leading the way

YoY Growth (2017-2018)

					
	Indonesia	China	Canada	Malaysia	Philippines
Mcommerce	39%	38%	34%	31%	31%
Ecommerce	33%	34%	27%	25%	25%



Daily Twitter users from Asia are more likely to shop on mobile than Twitter users from the West

80%

Asia markets

66%

Western markets

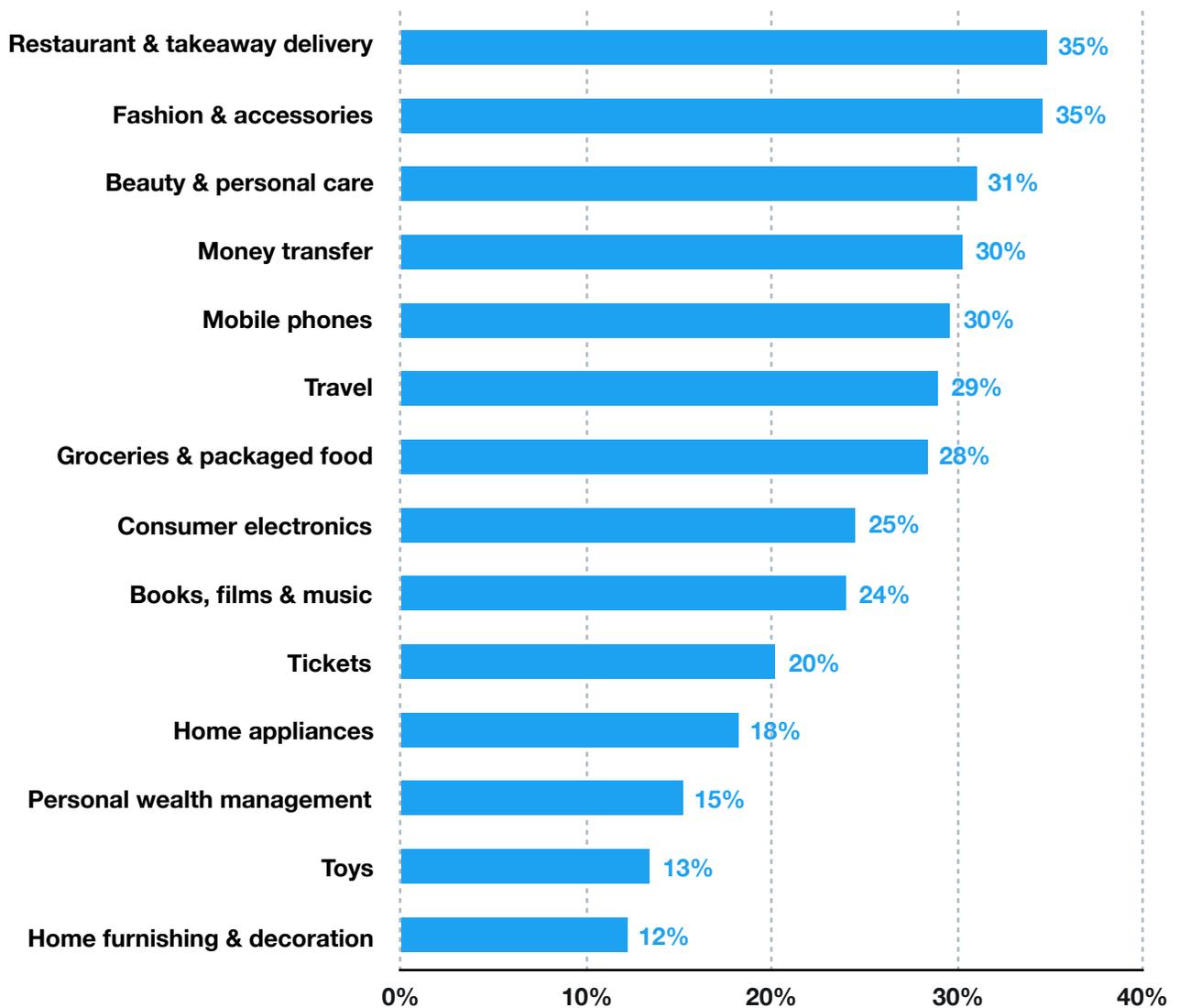
Source: eMarketer: <https://forecasts-na1.emarketer.com/5a53f4f2d8690c0d70ffaa06/5b2aab133808a50ff80464db>
Twitter Mcomm Study 2018



2 Shopping lists are changing over time

Shopping is not just limited to apparel. Even mobile-resilient categories like furniture and home appliances are seeing an increase in consumer intention to buy on mobile.

Product category: Intention to increase purchases on mobile in 2019



*Among Twitter users based on global data



3 Millennials are driving the Mcommerce sector

Expectedly, millennials on Twitter are more likely to shop on mobile than older generations. While the older generation is still more likely to use mobile for shopping when comparing with non-Twitter users.

76%

of millennials on Twitter are shopping on mobile

62%

of older users on Twitter are shopping on mobile

39%

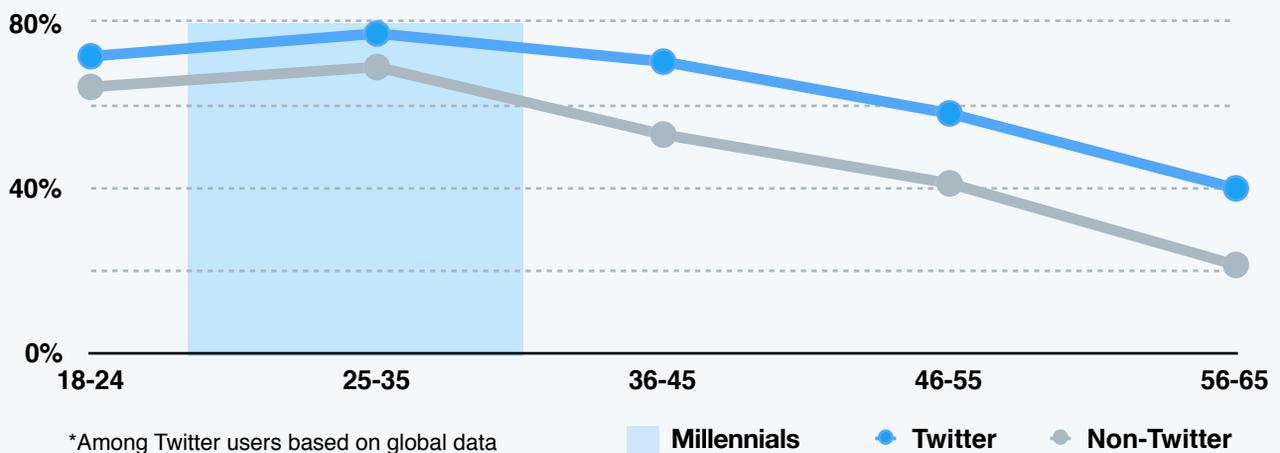
of millennials on Twitter shopping ONLY on mobile on a weekly basis

vs.

54%

of non-Twitter older users

Percentage in mobile shopping by age



4 Innovation improves the shopping experience



Augmented reality (AR) has changed the mobile shopping experience. AR has taken the guesswork out of shopping, with shoppers turning to Twitter to share how visualising their purchases through AR has helped them commit to a purchase.

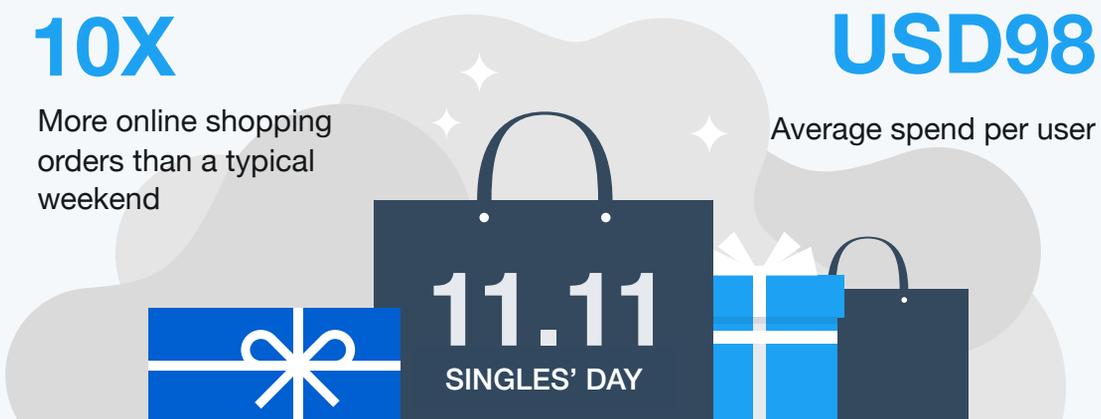
2X Conversation volume increased around “Augmented Reality” in 2018 vs. 2016

Twitter users come to the platform to praise parcels delivered on time, and the automation and robotics technologies that make it possible.



5 Shopping events cross regional barriers on mobile

Black Friday sales that originated in the United States has made its way to the SEA region. Likewise, SEA Ecommerce companies have embraced Singles' Day (11.11) initiated by Chinese giant Alibaba.

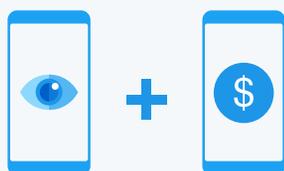


*Among 7 APAC markets: Australia, Indonesia, Malaysia, Philippines, Singapore, Taiwan, Thailand

6 Omnichannel is not a buzzword but a reality

Shopping is getting increasingly fragmented, with shoppers taking different routes to reach their final purchase decision. By understanding the user shopping journey and behaviour, brands are able to better tailor messaging specific to the channels they buy.

Twitter users are more likely to shop *and* buy online.



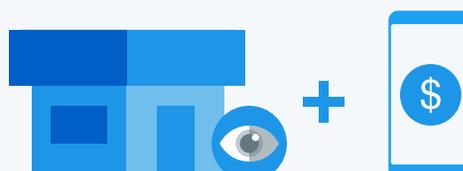
70%

of Twitter users visit an online store first and make a purchase online

VS.

63%

of non-Twitter users



45%

of Twitter users visit a physical store first and make a purchase online

VS.

24%

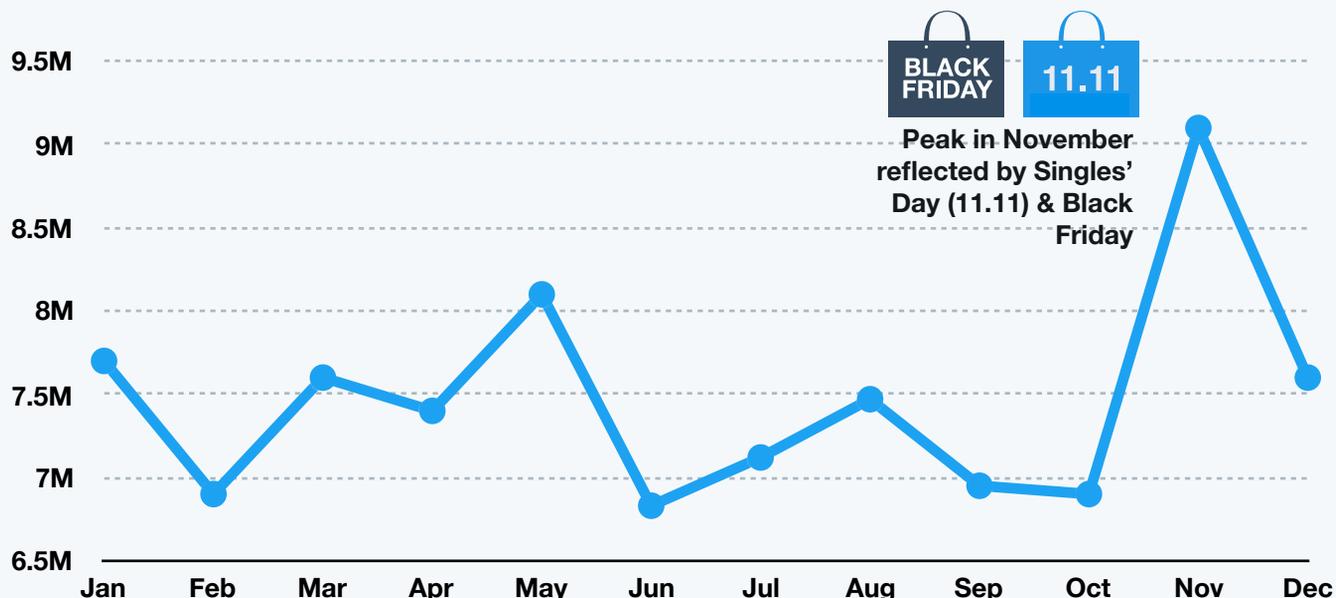
of non-Twitter users



Mcommerce is happening on Twitter

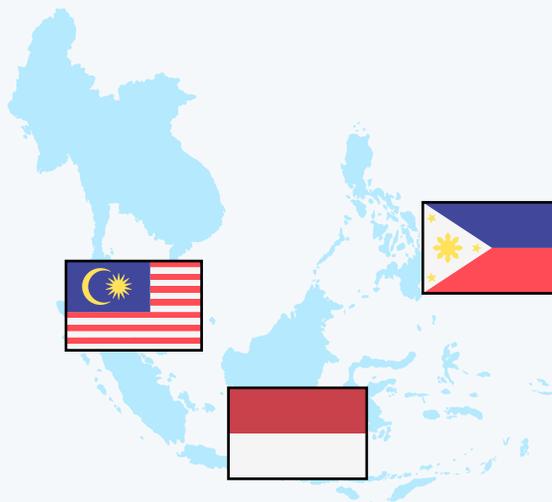
In 2018, there were 90 million Tweets around “shopping” and “sales”:

Conversations volume around “shopping” and “sales”



SEA markets are among the top 10 countries that Tweet the most about “shopping” and “sales”

- | | |
|----------|---------------|
| 1 USA | 6 Indonesia |
| 2 UK | 7 Malaysia |
| 3 Brazil | 8 France |
| 4 Canada | 9 Philippines |
| 5 India | 10 Spain |

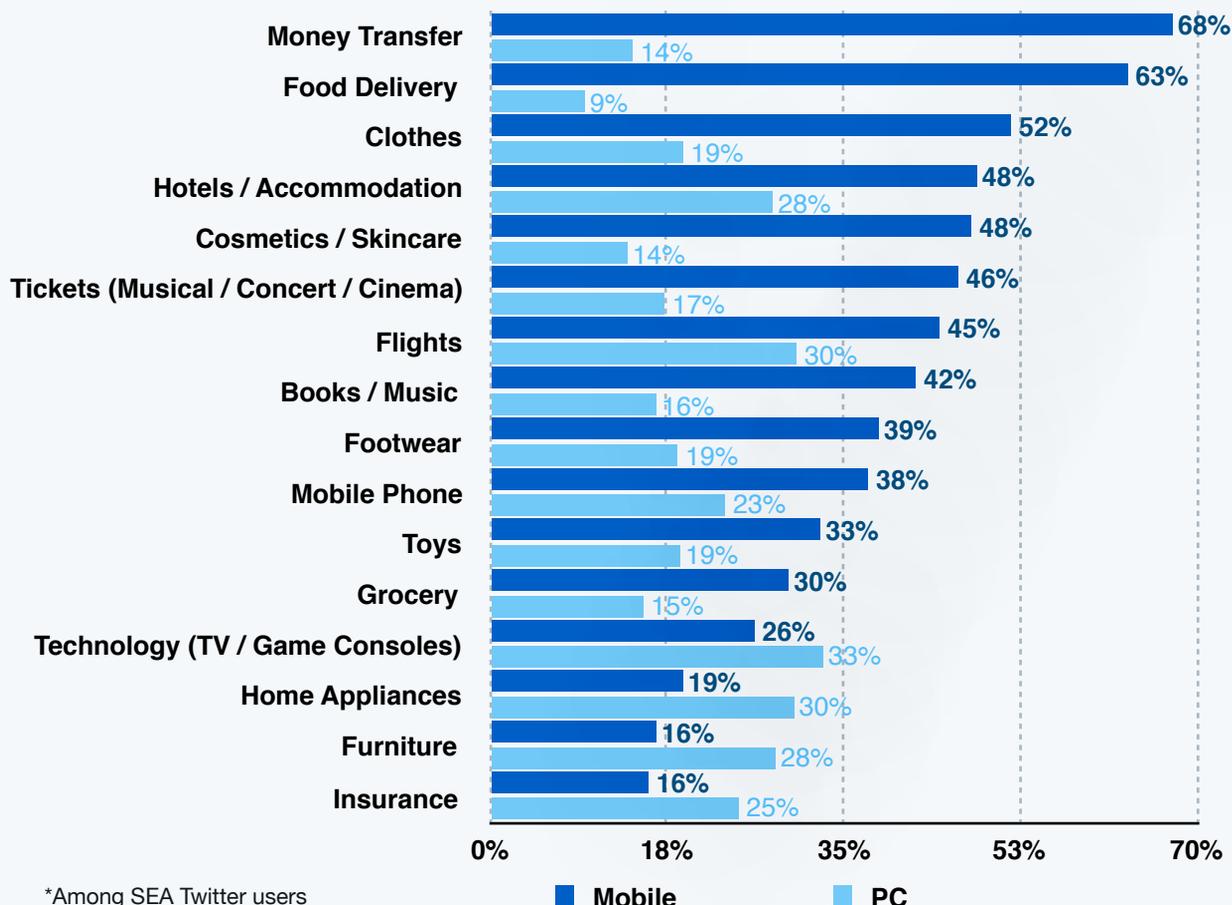


Source: Crimson Hexagon, Jan-Dec 2018, Location: Global, Language: English



Purchases by product category: Mobile or PC?

In SEA, mobile has become lead purchase platform across all the majority of categories. Interestingly, categories with higher purchase involvement like hotel and flight bookings are mobile centric.



Top 3 mobile shopping product category for each market



Thailand

1. Money transfer **73%**
2. Food delivery **56%**
3. Clothes **47%**



Philippines

1. Food delivery **56%**
2. Money transfer **54%**
3. Clothes **48%**



Indonesia

1. Food delivery **80%**
2. Money transfer **73%**
3. Hotels **66%**



Most important factors in mobile app shopping

Twitter users in SEA value transaction safety, high quality products and rewards, rebates and promotions. These factors are consistent with the most important factors when shopping on mobile apps globally over the past 2 years.



Transaction safety

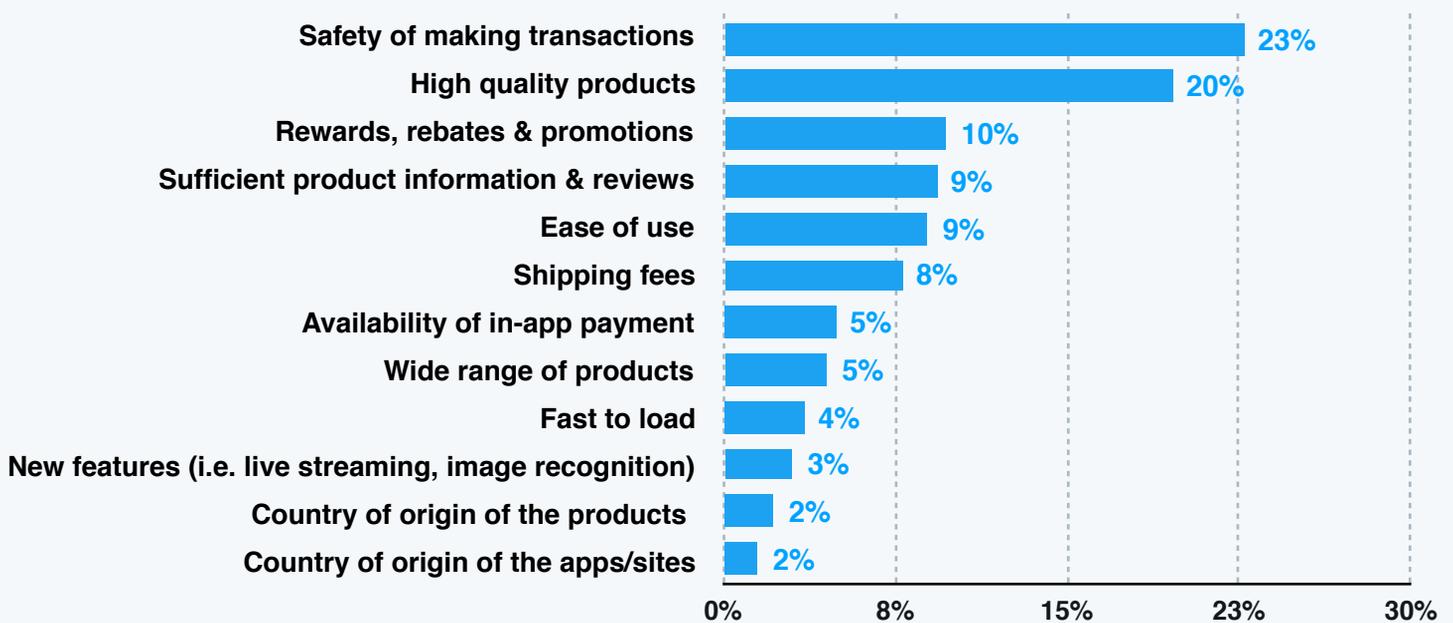


High quality products



Rewards, rebates and promotions

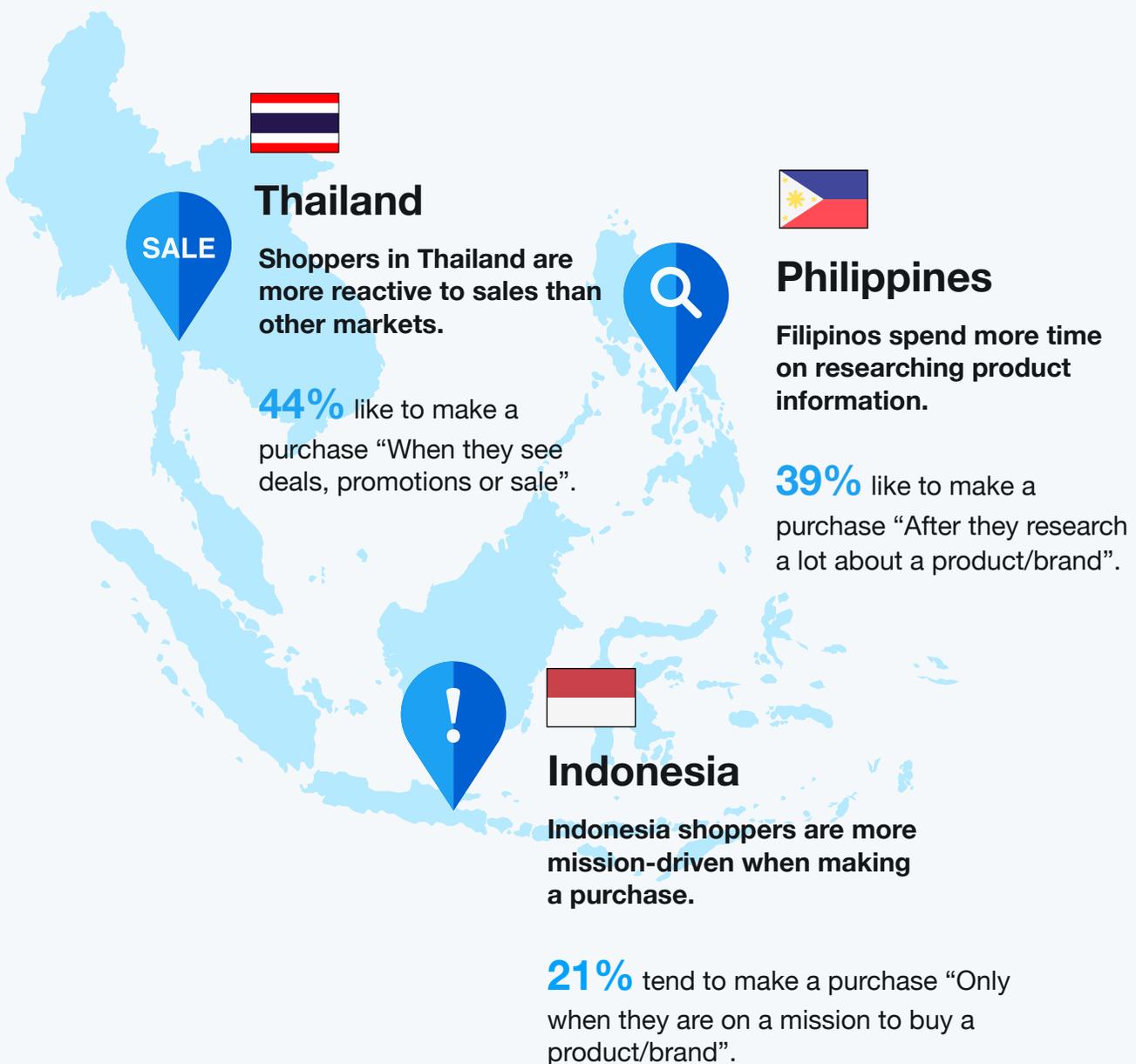
Most important factors in mobile app shopping



*Among SEA Twitter users



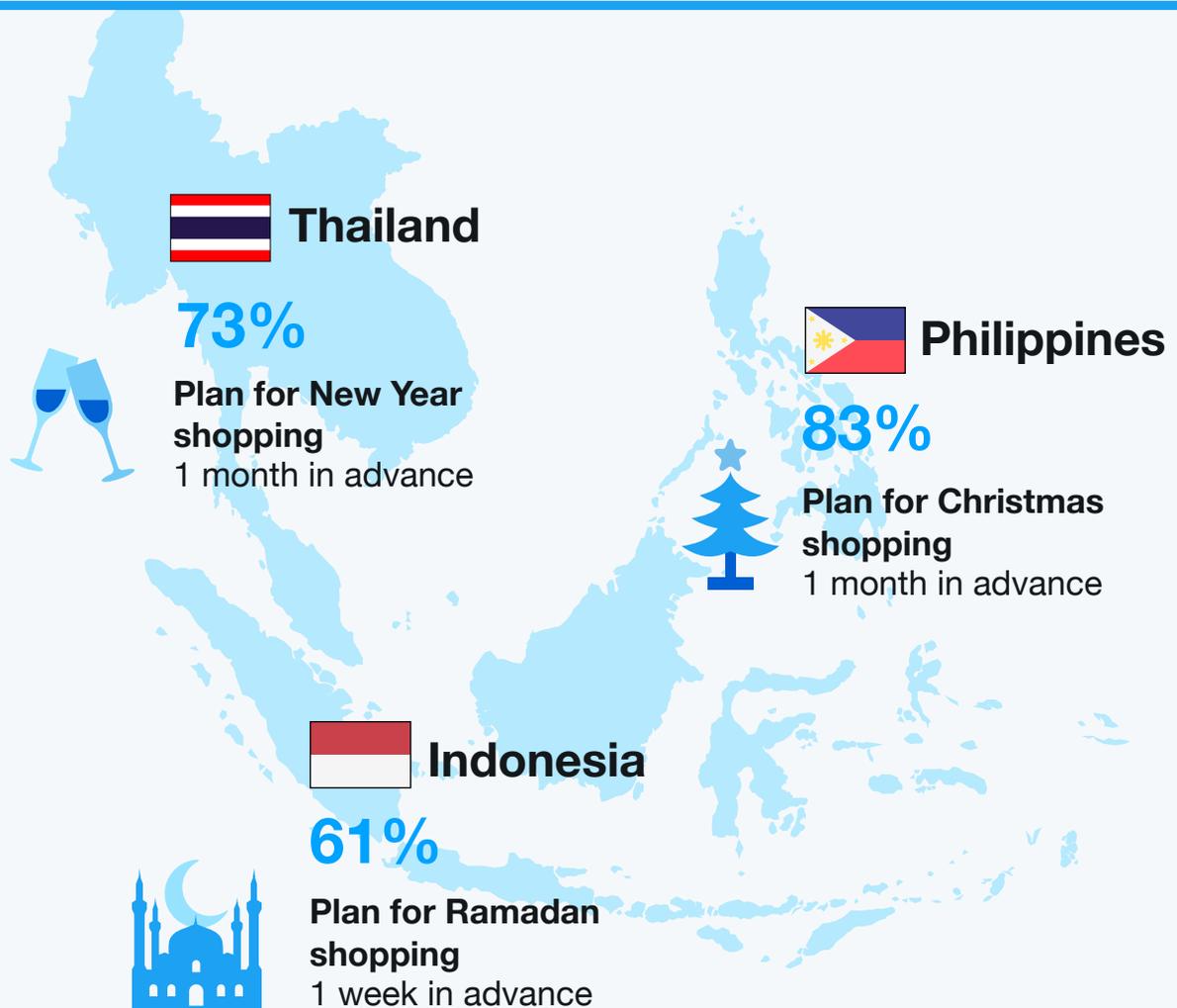
Different purchase behaviours of Twitter shoppers across SEA



*Among SEA Twitter users



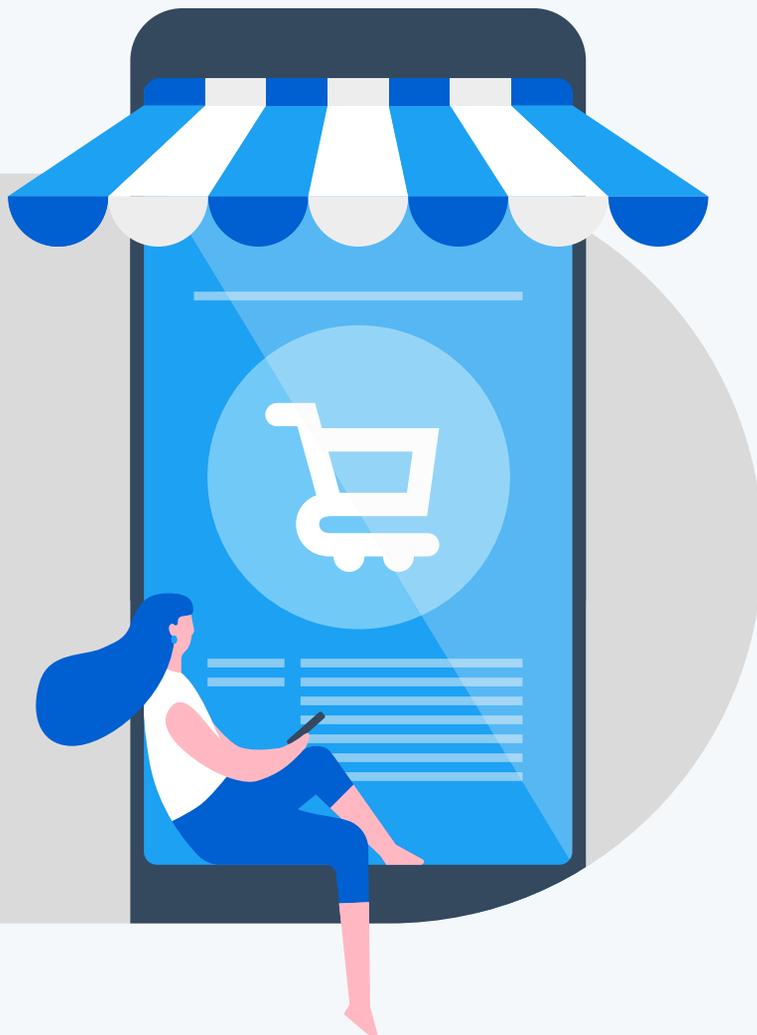
Most desired shopping events on mobile and how far do Twitter users shop in advance?



*Among 9 shopping events: Black Friday, Chinese New Year, Christmas, Diwali, Singles' Day (11.11), Easter, Ramadan, New Year, Thanksgiving



Twitter presents an opportunity for brands to reach its most receptive audience:



81%

of users look for opinions on products, services and brands on Twitter

71%

of users publish opinions on products, services, or brands

33%

Twitter users are heavy mobile shoppers (shops on a weekly basis)



#LetsChat

With this information, brands can speak directly and more effectively to a Twitter audience that's already engaged and receptive to shopping and Mcommerce messaging. By understanding where your shoppers come from and why, you'll be able to tailor your message directly to your audience.

Speak with our client partners at Mcommerce-SEA@twitter.com to gain more insights and learn how to harness that to connect with your most valuable audience.



Thank you