

What's next for the future of



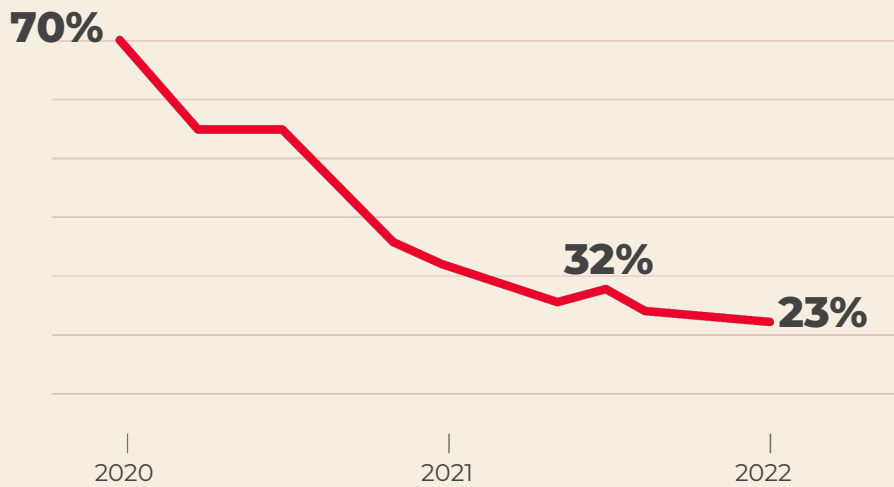
**E-commerce in
Southeast Asia?**

E-commerce landscape in the new normal

While growth of e-commerce in Southeast Asia (SEA) has been on a steady rise in the past years, COVID-19 pandemic has propelled it into a new phase.



% of people who started shopping online in SEA



2020 figure is from E-commerce SEA Barometer Report 2021, while 2021 and 2022 figures are from recent survey results gathered from over 9,000 participants.

E-commerce landscape in the new normal



As we move beyond the pandemic, offline shopping appears to be returning to pre-pandemic stage with shoppers looking to connect with brands in-person.

Coupled with other global macroeconomic headwinds, it seems like SEA's e-commerce boom is slowing down.

Of course, there remains a long runway for growth as SEA's e-commerce enters the next stage of its development (see [Mckinsey, SYNC Southeast Asia by Bain & Company and Meta](#), and [e-conomy SEA by Google, Temasek, Bain](#)).

As e-commerce sellers, how do you continue to stay relevant and create business opportunities in the next phase?

**Source, Facebook & Bain Company research
<https://www.facebook.com/business/news/southeast-asia-digital-consumers-new-stage-evolution>*



***The overall outlook for digital shopping remains positive, with GMV still expected to grow by a CAGR from US\$129 billion to US\$280 billion in 2027.**



Started in 2014, Ninja Van Group had a front-row seat to SEA's e-commerce evolution.

This position enables us to observe and identify – from servicing close to 2,000,000* sellers in SEA across the past 12 months – up-and-coming e-commerce insights and trends.

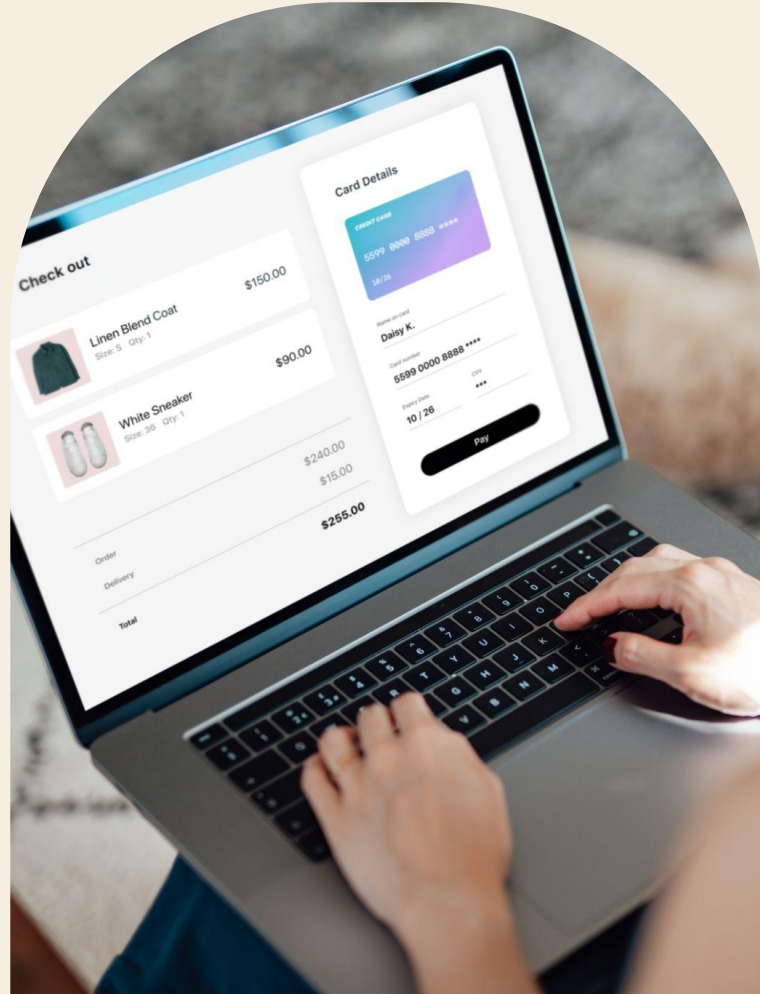
**Figure is accurate as of 31 Mar 2023.*

We gathered responses from over 9,000 participants, across six countries – Malaysia, Singapore, The Philippines, Indonesia, Thailand and Vietnam – to shed light on a group of avid e-shoppers, affectionately dubbed:



E-SHOPAHOLICS





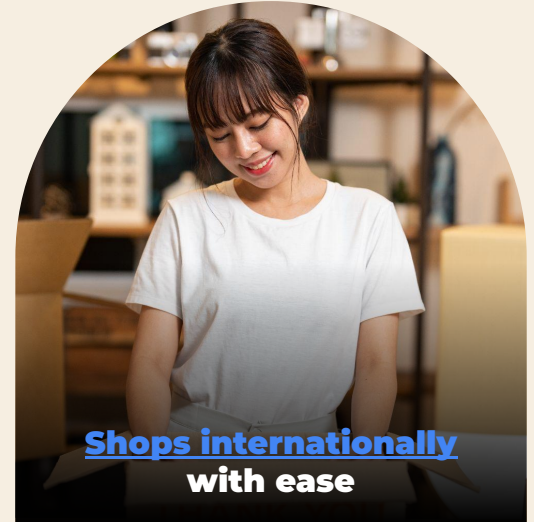
So... who are these e-shopaholics?

And why do e-shopaholics matter?

Here's why e-shopaholics matter.



Online shopping is second nature to an e-shopaholic.





A clear preference to shop
for **nearly 100% of their
products** online

—

E-shopaholics' purchases are driven by

—

Their **love and passion** for
online shopping



E-shopaholics are early adopters of online shopping.

Many were there during the times when online shopping was still a difficult endeavor in SEA.

They have expressed the will **to overcome barriers of the nascent e-commerce industry to buy what they want.**



“Back then, **I had to SMS or email blogshop sellers to buy items I want.** I also went through the period of **searching on forums for reliable agents to buy items from Taobao.**”

Lyn, 35, Consultant, Malaysia
Online shopping since 2008



“It used to be very time consuming to shop in stores for gardening products. **Since I started shopping on Facebook, I can look for what I need easily!**”

Chutinun Moungrisak, 36,
Freelancer, Thailand
Online shopping since 2012



“**I have tried different shopping platforms** – eBay, Yahoo auctions, forums – to buy items that are not available in SG. **Shopping online was not easy** because the sites I buy from don't do international shipping. So **I had to ship the items to a proxy before sending it to SG.**”

Cedric Wceke, 36, Regional PR Lead,
Singapore
Online shopping since 2000s



We break down what makes an 'e-shopaholic' over one-on-one phone interviews gathered in April 2023.

Impressionable



Invested



Savvy



Loyal



Impressionable

Social media and influencers are e-shopaholics' new search engines.

These platforms also **heavily influence e-shopaholics' buying decisions.**

***91%** of e-shopaholics buy from influencers' recommendations and brands they follow on social media.

**Based on survey results gathered from over 9,000 participants.*

"Social media is a good way to keep [me] updated with trends. My purchases are heavily influenced by the influencers I follow and personalised ads I see on Facebook and Instagram."

*Adrienne Martines, 32, Market Manager, The Philippines
Online shopping since 2015* ★★★★★



"I follow influencers, and am drawn to their branding and style. I trust them and the products they recommend so whenever I buy, I will never question the quality."

*Darryl Cheong, 25, Designer, Singapore
Online shopping since 2018* ★★★★★



"I follow beauty influencers to get updates, and I will Google-search these trends to learn more."

*Ardra Fiandra, 35, Online Seller, Indonesia
Online shopping since 2016* ★★★★★



"A particular fitness influencer I followed was wearing this sports attire, and it made me want to try too, so I bought it."

*Dominica, 30, Engineer, Malaysia
Online shopping since 2019* ★★★★★



“When I first started shopping online, I was disappointed by the quality of clothes, bags and shoes I received. **Now, I spend a lot of my time researching, reading reviews and getting the size chart correct.**”

Chyntia Putri Ridwan, 25, Legal Officer, Indonesia
Online shopping since 2017



“I would never have bought anything expensive / beauty products online. But it’s different now – **I trust the online shops that I buy from as I do my own research, try it in stores and watch video reviews before buying!**”



Papitchaya Sriwattana, 31, Media buyer, Thailand
Online shopping since 2013



“Google is my universe! Even if the product comes highly recommended by my friends, I will still do my own research, and part of it is **watching different video reviews** to make sure its good. Recently, **I am into dinnerware and was researching on Google and Baidu. I have also chatted with 5-10 merchants on Taobao** about it.”



Ng Li Ya, 31, Manager, Singapore
Online shopping since 2010



Invested



E-shopaholics spend an **extensive amount of time on product research**. Most consume reviews across multiple platforms before buying.

A great online reputation is key to the wallets of e-shopaholics.

Savvy

E-shopaholics are expert navigators of the e-commerce ecosystem. They **buy often, and they buy across multiple categories and platforms** – Facebook, Instagram, TikTok Shop, and marketplaces.

Compared to the average e-shopper who buys from tried and true marketplaces, **e-shopaholics are more willing to try new platforms** (after doing their research, of course!)

*Top three categories that e-shopaholics buy



**Based on survey results gathered from over 9,000 participants; excluded product categories such as Grocery and Fresh food and beverages*

"I **only bought clothes** every quarter when I first started. Nowadays, I **buy 90% of what I want / need online – clothes, furniture, groceries and daily essentials**. I even tried **live shopping and buy every time I tune in.**"

Supanai Rattanawinitkun, 39, AVP
– Digital Marketing, Thailand
Online shopping since 2008



"I have **grown accustomed to this mode of shopping, and have been buying everything I need online**, even gifts for my loved ones. It has been a hassle-free experience, and I **barely shop in stores anymore.**"

Nguyễn Hồng Cúc, 27, Business owner,
Vietnam
Online shopping since 2017



"I **love online shopping, and what I buy now have increased – fashion, household needs, even small items like paper clips!**"

Norafilza Zulkifli, 31, Airline Cabin Crew,
Malaysia
Online shopping since 2018



"I will follow and buy from brands / platforms that served me well. Everything so far has been superb!"

*Christel, 33, Sr. Data Analytics Officer, The Philippines
Online shopping since 2012*



"I used to buy from random shops because they were the cheapest. **Now, I only buy from shops that I trust. I follow them on social media so I can get regular updates.**"



*Nannapas Yubamrung, 28, Self-employed, Thailand
Online shopping since 2015*



"I stopped shopping on Facebook as I was disappointed with the product quality. However, **I went back to shopping on Facebook again after discovering some trustworthy shops that offer quality products.** I am their **loyal supporter and have been buying from them almost daily!**



*Nguyen Huynh Huong, 48, Teacher, Vietnam
Online shopping since 2018*



Loyal



E-shopaholics have much **higher standards than your average e-shoppers.**

From the initial browsing to receiving the parcel after the clicks and taps, **each stage is essential to ensuring an e-shopaholic's loyalty.**

Once you have their trust, not only will you **get a loyal customer** but also a **brand advocate** who will refer your shop to their network of friends and relatives.

In summary

Traits of an e-shopaholic

Impressionable



E-shopaholics' buying decisions are heavily influenced by social media and influencers.

Invested



E-shopaholics spend an extensive amount of time on product research and consume reviews across multiple platforms.

Savvy



E-shopaholics shop online frequently, across multiple product categories and are highly proficient in navigating different platforms.

Loyal



Once you have an e-shopaholic's trust, not only will you get a loyal customer but also a brand advocate who will refer your shop to their network of friends and relatives.

Incorporate traits of these e-shopaholics in your business strategy to win them over

Impressionable

Brands need to have a strong social media strategy that can influence consideration.

Invested

Every external touchpoint is an opportunity to build a great online reputation.

Savvy

Consider multichannel selling to provide more shopping options.

Loyal

Many aspects – quality products, good website, fast deliveries – contribute to a great shopping experience.



To assist e-commerce sellers in capturing the e-shopaholic market, Ninja Van has curated a list of products and services.

Here is a list of solutions that can help you influence these e-shopaholics

Impressionable

Stand out from the crowd with your social media content and use of influencers with:

- [Ninja Rewards](#) - a loyalty programme, where you can earn points to redeem attractive rewards and exclusive services including influencer management and content creation
- [TikTok Creator Marketplace](#) - a platform that connects businesses with talented content creators to collaborate and promote their products or services on TikTok.

Invested

For easy creation of artwork for all platforms – social media, marketplace store fronts, websites, use:

- [Canva](#) - a versatile online graphic design platform that empowers users to create stunning visuals for various purposes – social media, website, marketing materials – with ease.

Savvy

Be on top of your stock inventory as you manage across multiple sales channels with:

- [Sellercraft](#) - an online order management tool, Sellercraft ensures that e-commerce businesses will never lose an order or customer.

Loyal

• Looking for quality products, check out [Ninja Direct](#) - an end-to-end procurement solution for SMEs across the region. Connect with suppliers and manufacturers with the help of our experienced on-ground team who will ensure that every order is procured to the best of standards.

• Need help with fulfilling orders, here's [Ninja Fulfilment](#) - an end-to-end warehousing and fulfilment capabilities that can be integrated into any e-commerce logistics supply chain.

• Build your online storefront with [Shopify](#) - the leading ecommerce platform that empowers entrepreneurs and businesses of all sizes to create, manage, and grow their online stores.

Conclusion

Well-versed in the intricacies of online shopping, these e-shopaholics have developed a high standard when it comes to their online shopping experience.

To effectively capture their attention and loyalty, e-commerce sellers must invest considerable effort in delivering exceptional shopping experiences.

By recognising the unique needs and preferences of the e-shopaholics, e-commerce sellers can establish strong connections, earn trust, and ultimately create business opportunities in this new phase of e-commerce growth.





The online shopping experience ends only when the shopper is in possession of the desired purchase. Delivery, being the final stage of online shopping, contributes significantly to the overall experience.

This sentiment is echoed among the survey participants, with **92% of them sharing that they would like to know the delivery company** as it **provides a level of reassurance** and **some sense of service guarantee**.

Being in SEA with 100% logistics network coverage in Singapore, Malaysia, The Philippines, Indonesia, Thailand and Vietnam, Ninja Van is committed to use its unique position to continue supporting e-commerce businesses – from sharing e-commerce insights and trends to providing hassle-free delivery solutions.





Quantitative:

Ninja Van Group conducted the fieldwork with over 9,000 interviewees between July and August 2022 for the data that this white paper is based on. Equal country data weighing has been applied to this data set to represent SEA.



1,500

1,504

1,500

1,501

1,500

1,503

Respondents

Qualitative:

Ninja Van Group interviewed a total of 65 self-proclaimed e-shopaholics (defined as someone who buys more 70% of their stuff online across multiple categories (6 or more) from Singapore, Malaysia, Indonesia, The Philippines, Thailand, and Vietnam to find out more about their shopping behaviours.

All quotes in the report are gathered between April and May 2023, and have been redacted for brevity and editorial clarity.



Ninja Van is a tech-enabled express logistics company providing hassle-free delivery solutions for businesses of all sizes across Southeast Asia.

Launched in 2014, Ninja Van started operations in Singapore and has become the region's fastest-growing last-mile logistics company, powering businesses with innovative logistics solutions. Today, Ninja Van has grown its network to cover six countries: Singapore, Malaysia, Indonesia, The Philippines, Thailand, and Vietnam. For more information, visit www.ninjavan.co.

