GENERAL INFORMATION

PRODUCT DETAILS
Title: Southeast Asia B2C E-Commerce Market 2017
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QUESTIONS ANSWERED IN THIS REPORT
What is the market size of B2C E-Commerce in Southeast Asia?
Which countries in Southeast Asia lead by online retail sales and growth rate?
What predictions are made regarding the future of B2C E-Commerce in Southeast Asian economies?
Which devices, products, and payment methods do Southeast Asian online shoppers prefer?
Who are the most important competitors in Southeast Asian B2C E-Commerce?

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SOUTHEAST ASIA’S RISING STAR ON THE GLOBAL E-COMMERCE MAP

With strong double-digit growth rates, Southeast Asia has moved from the periphery to the very center of the global E-Commerce scene. Although B2C E-Commerce’s share of total retail sales in this region remains low at barely a few percentage points, the market's potential is high due to rising broadband and mobile connectivity and the consumers’ growing affinity to shopping online. According to sources cited in this report from yStats.com, B2C E-Commerce product sales in Southeast Asia are on their way to reaching a high double-digit figure in billion U.S. dollars by 2025. National governments across the region show support for this growth, having adopted various programs aimed at boosting E-Commerce in their countries.

Indonesia is both the largest and the fastest growing B2C E-Commerce market in the region. The fourth most populated country in the world, Indonesia sees rapid growth of online retail characterized through strong mobile and social commerce trends. Two thirds of online buyers in this country made purchases from smartphones in 2016, and more than one-half of them recognized Facebook as a major platform for buying and selling online, according to surveys unveiled in yStats.com’s report.

Thailand has the second largest online retail market and is a regional leader in M-Commerce penetration. As yStats.com’s report shows, close to 50% of online spending in this country was done on mobile in 2016. Singapore, on the other hand, is the most advanced of the pack, with the highest current B2C E-Commerce share of retail sales, Internet penetration and speed, and is also the country with the most pronounced cross-border online shopping trend. Malaysia also boasts a relatively high penetration of Internet users, but only around one-third of them shopped online, with clothing as the most demanded product category. Online retail in Vietnam and the Philippines is nascent but growing at a rapid pace, outshone only by that of Indonesia.

Alibaba Group’s Lazada is a strong market player in Southeast Asian E-Commerce, ranking as the most visited E-Commerce website in the majority of the six countries, according to data contained in the yStats.com’s report. There are also several major local competitors in each of the markets, such as Mobile World in Vietnam, 11Street in Malaysia, and Giosis in Singapore. Moreover, Amazon is an important market influencer despite the absence of local operations. Overall, the marketplace model seems to dominate the online shopping landscape in this emerging region.
SOUTHEAST ASIA B2C E-COMMERCE MARKET 2017

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### Southeast Asia B2C E-Commerce Market 2017

#### Report-Specific Sample Charts

#### 7.9% of Internet users or 2.4 million people in Thailand made purchases online in Q1 2016.

<table>
<thead>
<tr>
<th>Location</th>
<th>Shopping in Thousands</th>
<th>Penetration in % of Internet Users in Reporting Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bangkok</td>
<td>544.1</td>
<td>5.7%</td>
</tr>
<tr>
<td>Central Region</td>
<td>716.4</td>
<td>7.2%</td>
</tr>
<tr>
<td>Northern Region</td>
<td>362.0</td>
<td>4.5%</td>
</tr>
<tr>
<td>Northeast Region</td>
<td>359.0</td>
<td>4.4%</td>
</tr>
<tr>
<td>Southern Region</td>
<td>305.0</td>
<td>4.5%</td>
</tr>
</tbody>
</table>

#### Gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>Penetration in % of Internet Users in Reporting Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>539.2</td>
</tr>
<tr>
<td>Female</td>
<td>1,049.0</td>
</tr>
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</table>

#### Age Group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Penetration in % of Internet Users in Reporting Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-24</td>
<td>11.4</td>
</tr>
<tr>
<td>25-34</td>
<td>33.1</td>
</tr>
<tr>
<td>35-44</td>
<td>54.6</td>
</tr>
<tr>
<td>45+</td>
<td>174.0</td>
</tr>
</tbody>
</table>

#### Total

Total: 5,380.1

Note:
- The penetration value was calculated based on the number of online shoppers and internet users in the expected population groups, as reported to the source individual who has never purchased goods on services on the internet.

#### “Clothes & Accessories” (45%) and “Home Appliances” (35%) were the top two product categories bought online in Vietnam in August 2016.

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Share in Online Shoppers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothes &amp; Accessories</td>
<td>45%</td>
</tr>
<tr>
<td>Home Appliances</td>
<td>35%</td>
</tr>
<tr>
<td>Grooming</td>
<td>30%</td>
</tr>
<tr>
<td>Personal Care</td>
<td>27%</td>
</tr>
<tr>
<td>Computers and Laptop</td>
<td>25%</td>
</tr>
<tr>
<td>Vouchers</td>
<td>22%</td>
</tr>
<tr>
<td>Mobile Phones and Tablets</td>
<td>20%</td>
</tr>
<tr>
<td>Books and E-Books</td>
<td>18%</td>
</tr>
<tr>
<td>Food and Beverage</td>
<td>17%</td>
</tr>
<tr>
<td>Mattresses &amp; Bedding</td>
<td>15%</td>
</tr>
<tr>
<td>High Technology Products</td>
<td>13%</td>
</tr>
<tr>
<td>Beauty Services</td>
<td>11%</td>
</tr>
<tr>
<td>Sport and Leisure</td>
<td>7%</td>
</tr>
<tr>
<td>Auto &amp; Accessories</td>
<td>5%</td>
</tr>
<tr>
<td>Others</td>
<td>1%</td>
</tr>
</tbody>
</table>

Note:
- Survey was conducted on a sample of 1000 respondents, of whom 50% were online shoppers. 52% of respondents were between 18 and 35 years old, while 39% were from Ho Chi Minh city, 4% were females and 36% men. Conducted in August 2016. Question asked: “What did you buy at online E-commerce websites?”, the basis of respondents for this question were 1000 online shoppers.

Source: Chitmark.com, August 2016.
SOUTHEAST ASIA B2C E-COMMERCE MARKET 2017

GENERAL METHODOLOGY OF OUR MARKET REPORTS

Secondary Market Research
- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all obtained data. As a result, companies gain a precise and unbiased impression of the market situation.
  - Cross referencing of data is conducted in order to ensure validity and reliability.
  - The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
  - The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.
Definitions
- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.
Chart Types
- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Subtitle, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.

Report Structure
- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.

Notes and Currency Values
- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
- When providing information about amounts of money, local currencies are most often used. When referencing currency values in the Action Title, the EUR values are also provided in brackets. The conversions are always made using the average currency exchange rate for the respective time period. Should the currency figure be in the future, the average exchange rate of the past 12 months is used.

METHODOLOGY OF OUR SOUTHEAST ASIA B2C E-COMMERCE MARKET 2017

Report Coverage
- This report covers the retail E-Commerce market in six major Southeast Asian countries: Indonesia, Malaysia, Philippines, Singapore, Thailand, and Vietnam. A broad definition of retail E-Commerce used by some original sources cited in this report might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.
- The report contains relevant information about international comparisons, market trends, E-Commerce sales and shares, Internet users and shoppers, products, payment methods, delivery and players.

Report Structure
- The report starts with an overview of the regional E-Commerce market and country comparisons in terms of criteria relevant to retail E-Commerce, such as sales, Internet and mobile shopper penetration. The rest of the report is divided into country chapters, presented in the descending order of retail E-Commerce sales. Data availability varied by country.
- Each country chapter starts with an overview chart, highlighting the overall E-Commerce development in that country.
- Next, the “Trends” section includes an overview of relevant market trends, such as M-Commerce, social commerce, and cross-border online shopping.
- The section “Sales & Shares” covers the development of retail E-Commerce sales and E-Commerce’s share of total retail sales. Where available, information from several sources was provided for cross-referencing.
- In the “Users & Shoppers” section, information about Internet penetration and online shoppers is included.
- Afterwards, the section “Products” shows the leading product categories purchased online.
- The next section, “Payment”, covers the payment methods most used by online shoppers.
- Furthermore, the “Delivery” section covers information related to delivery in E-Commerce.
- Finally, the “Players” section includes information about the leading E-Commerce companies, including rankings of top online shopping platforms by website visits, awareness and usage rates by online shoppers, where available.
SOUTHEAST ASIA B2C E-COMMERCE MARKET 2017
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<td>May 2017</td>
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<td>Global Alternative Online Payment Methods: Full Year 2016</td>
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UPCOMING RELATED REPORTS

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DR. MARCUS ACKERMANN
MEMBER OF THE EXECUTIVE BOARD
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FREQUENTLY ASKED QUESTIONS

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- Why use yStats.com?
yStats.com can be your provider of the most current B2C E-Commerce data. Whether you seek country-specific, topic-specific, regional or global information, we ensure through secondary market research maximum objectivity for all data obtained. With our boardroom-ready PowerPoint presentations you save time and money.

- What are the benefits of secondary market research?
Secondary research is not only a cost-effective alternative to conducting primary research studies, but it is also a time-efficient solution. Our researchers derive information and data from a variety of reliable published sources and compile the data into understandable and easy-to-use formats.

- Does yStats.com provide consulting services?
No, we do not provide consulting services in any form.

OUR PRODUCTS

- What types of products does yStats.com offer?
yStats.com offers individual market reports and full access subscriptions (varying in license types and duration) to current and future published reports. The currently available reports can be found in the Market Reports section of our website. The list of soon-to-be-published reports can be found in the Upcoming Reports Section on our homepage. For a more extensive list of upcoming reports, please contact us directly. For more information about our Full Access subscription, please see the Full Access page on our website. Apart from market reports and subscription, yStats.com also offers custom research services.

- What is your research methodology?
Our reports are exclusively based on secondary market research. Our researchers derive information and data from a variety of previously published, reliable sources and compile the data into understandable and easy-to-use formats.

- From which sources is information for reports derived?
Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all data obtained.

- Is information in the reports comparable across countries?
Due to the fact that information included in the market reports is derived from different sources which might rely on different definitions, some information might not be comparable across countries.

- What are the report format options?
Our reports are published in PDF and PowerPoint formats. PowerPoints are ready-to-use for boardroom presentations, but also easily editable to suit your business needs.

- Does yStats.com offer reports in other languages?
All of our reports are published in English at this time.

- How can I find the most relevant report?
On our website, you can use various search features or search by keyword. You can also contact us directly describing your research needs and we will help you find the appropriate report that satisfies them.

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- Can I purchase only selected parts of a report?
Unfortunately, our market reports are only sold as a whole.

- Is there an overlap between country, regional and global reports on the same topic?
Some reports can have overlapping content, such as regional reports containing content from parts of individual country reports. Please consult the Table of Contents or contact us if any questions should arise.

- I would like to see a sample of a report. Where can I find it?
Free sample charts from each report can be viewed in the product brochure. Also a standard free sample is available for download from each report page. To get an idea what our reports look like you can download a standard Free Full Report from our online shop.

For a full version of Frequently Asked Questions, please visit: https://www.ystats.com/faq-by-section/
FREQUENTLY ASKED QUESTIONS

OUR PRODUCTS (CONT.)

- When will an update of a particular report be published?
  In general, our market reports are published on an annual basis. Online Payment reports are updated on a semiannual basis. Please consult the "Upcoming Reports" section on our homepage or "Related Reports" section of our product brochure. We have a publication schedule that we adhere to, so if you'd like to know about a specific report, please contact us.

- Do you offer subscriptions to reports?
  Yes, we do have a number of subscription options called “Full Access”. Some leading international enterprises subscribe to our reports to get the most comprehensive insight into B2C E-Commerce and online payment markets worldwide contained in our market reports collection and ensure cost efficiency. There are several Full Access subscription options varying in number of possible seats allocated and duration of subscription. For more information on our various Full Access Subscription offers, see our Full Access Subscription page on our website and contact us.

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- I need more information about a particular topic. Do you offer further products or services?
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TOTAL

CHOOSE YOUR PAYMENT METHOD
Choose Your Preferred Payment Method:

- Credit Card
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  - MasterCard
  - American Express
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- Bank Transfer
  - Bank Transfer information will be provided to you in the invoice you receive following submission of an Order Form offline.

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Card Holder
Card Number
Exp. Date
Security Code**

**If you prefer, this can be communicated over the phone or via secured e-mail communication.

COMPLETE YOUR CONTACT DETAILS
An invoice will be sent to your company

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