

E-Commerce Consumer Outlook 2018

Version 2

November 2018

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This study will be carried out in compliance with ISO 20252

GAME CHANGERS



Respondent Criteria & Methodology

TARGET RESPONDENT



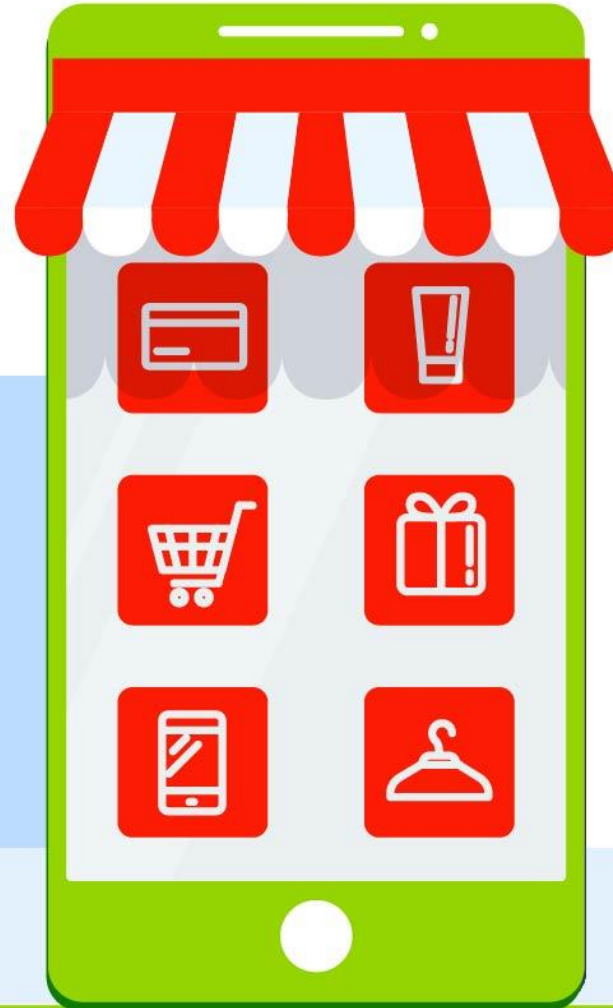
BOTH MALE
AND FEMALE



ALL SEC



18 – 55 yo



DATA COLLECTION

ONLINE PANEL
W/STRUCTURED
QUESTIONNAIRE



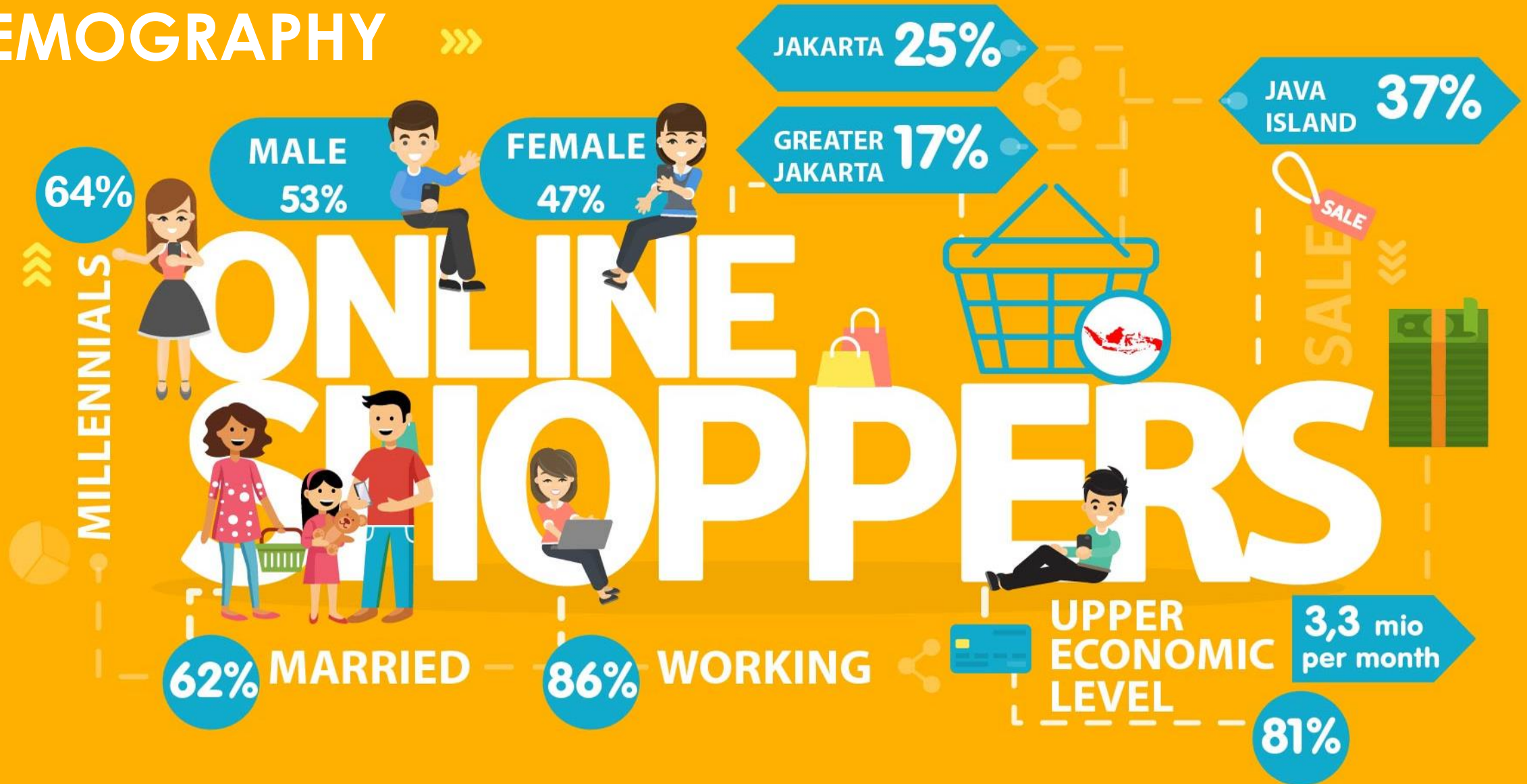
FIELDWORK
20 - 26 AUG 2018



NATIONAL
COVERAGE
400 RESPONDENT



DEMOGRAPHY >>>



Online shoppers are skew to millennials, married, and working. More than half are university graduate. They are equally in gender and live mostly in Jakarta and to some extent Greater Jakarta and Java Island. Online shoppers are mostly upper economic level with 81% and average personal income 3.3 mio per month

E-COMMERCE VISITED IN THE PAST 1 MONTH

Tokopedia and Shopee are the most e-commerce visited and purchased in the past 1 month.



PAST 1 MONTH E-COMMERCE

49%



45%



39%



38%



17%



12%



9%



6%



4%



4%



4%



2%



Product Category Purchased in The Past 1 Month



**FASHION &
SPORT CLOTHES**
51%



**TECHNOLOGY
AND GADGET**
42%



**ELECTRONIC
PRODUCTS**
41%



**BILL PAYMENT/
TOP UP**
37%



TRAVEL
24%



MALE



FEMALE



**FASHION &
SPORT CLOTHES**
68%



**BILL PAYMENT/
TOP UP**
49%



COSMETIC
49%



PERSONAL CARE
41%



DAILY NEEDS
39%



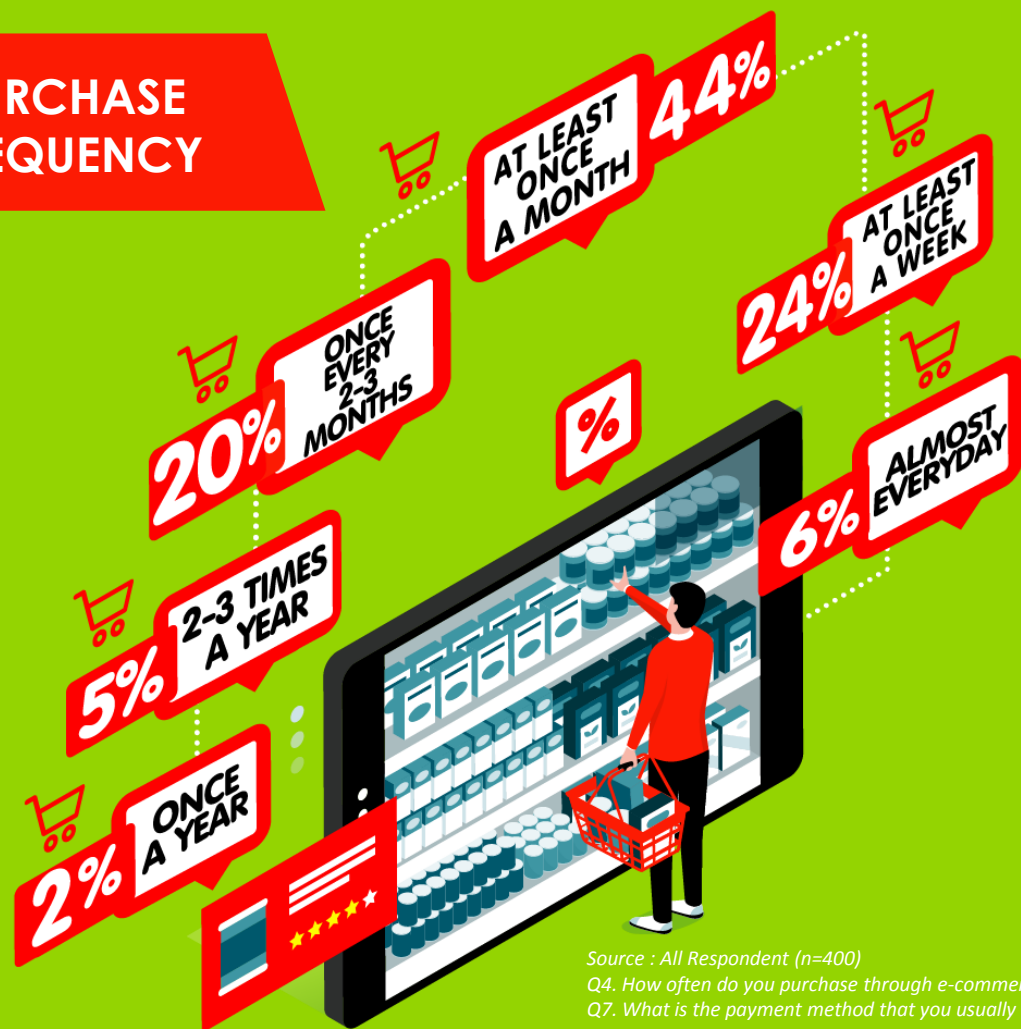
**FOOD AND
BEVERAGES**
38%



PURCHASE BEHAVIOR

Almost 75% of online shoppers do transaction at e-commerce at least once a month. Debit transfer/internet banking is the most convenient payment method.

PURCHASE FREQUENCY



Source : All Respondent (n=400)

Q4. How often do you purchase through e-commerce sites? SA

Q7. What is the payment method that you usually do to pay at online shop?

PAYMENT METHOD



GAME CHANGERS

PLACE AND TIME TO PURCHASE

Online shoppers usually shop during afternoon time
And they do it at home.

**TIME TO SHOP
AFTERNOON
(12 noon – 3pm)**



36%

**PLACE OF
PURCHASE: AT HOME**



73%





Let's focus on Millennials!



Millennials Demography



Millennials Online shoppers are skew to married and working. More than half are university graduate. Most of them are upper economic level and 53% has personal income minimum 4mio per month.

E-COMMERCE VISITED IN THE PAST 1 MONTH

Shopee and Tokopedia are the most visited and purchased e-commerce in the past month.

PAST 1 MONTH E-COMMERCE



51%



44%



38%



35%



17%



11%

Cut off 9%



Product Category Purchased in The Past 1 Month



**FASHION &
SPORT CLOTHES**
55%



**TECHNOLOGY
AND GADGET**
46%



**ELECTRONIC
PRODUCTS**
39%



**BILL PAYMENT/
TOP UP**
32%

DAILY NEEDS
23%



TRAVEL
23%



MALE



FEMALE



**FASHION &
SPORT CLOTHES**
67%



COSMETIC
55%



**BILL PAYMENT/
TOP UP**
48%



PERSONAL CARE
44%



DAILY NEEDS
43%



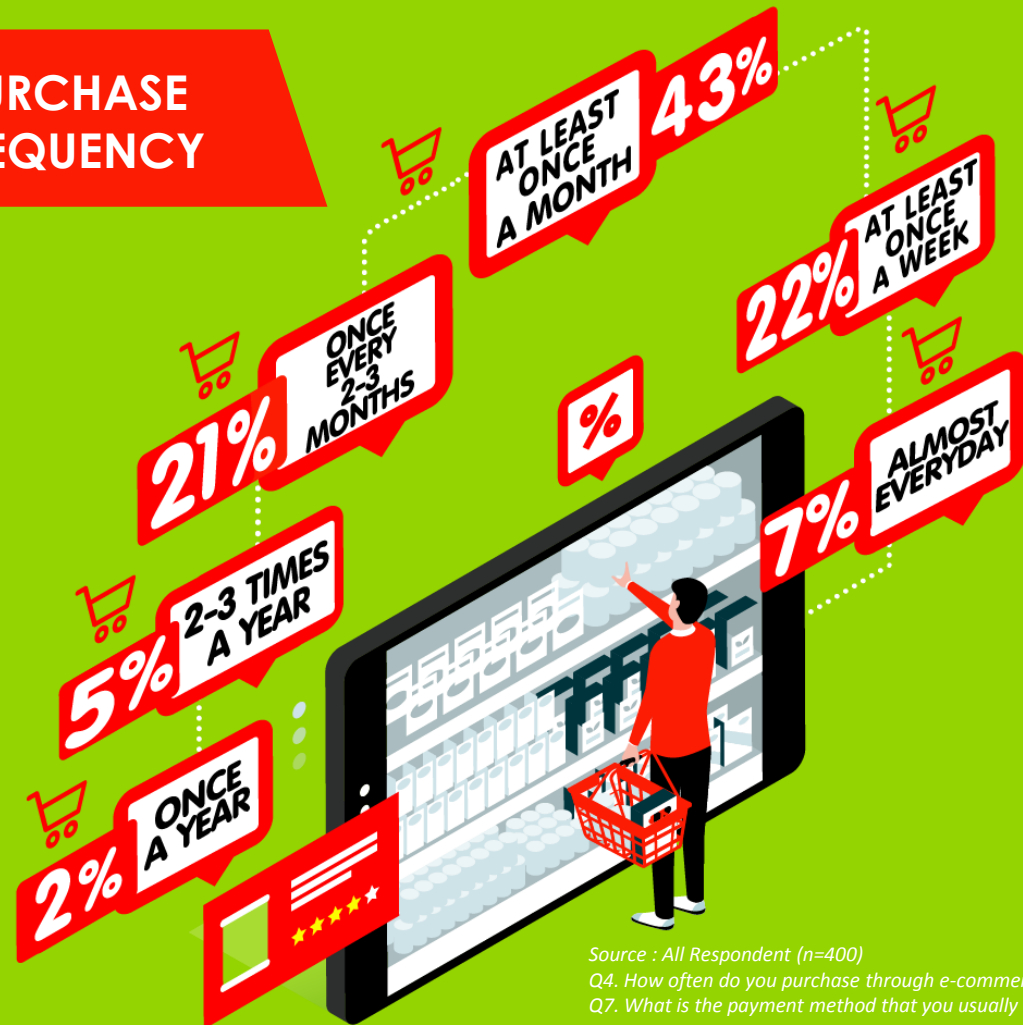
**FOOD AND
BEVERAGES**
40%



PURCHASE BEHAVIOR

72% of online shoppers do transaction at e-commerce at least once a month. Debit transfer/internet banking is the most convenient payment method.

PURCHASE FREQUENCY



Source : All Respondent (n=400)

Q4. How often do you purchase through e-commerce sites? SA

Q7. What is the payment method that you usually do to pay at online shop?

PAYMENT METHOD



GAME CHANGERS

PLACE AND TIME TO PURCHASE

Millennial shoppers usually shop during afternoon time
And do it at home.

**TIME TO SHOP
AFTERNOON
(12 noon – 3pm)**



38%

**PLACE OF
PURCHASE:**



AT HOME

72%





How about the non Millennials?



Non Millennials Demography



Non Millennials are people who have more stable life with upper economic level, working with 6mio per month income, and married.

E-COMMERCE VISITED IN THE PAST 1 MONTH

Different behavior shown by non millennial whereas they usually browse or shop at Tokopedia and Lazada.

PAST 1 MONTH E-COMMERCE



57%



46%



38%



34%

Cut off 17%



Product Category Purchased in The Past 1 Month



**BILL PAYMENT/
TOP UP**
50%



**ELECTRONIC
PRODUCTS**
46%



**FASHION &
SPORT CLOTHES**
38%



TRAVEL
29%



**TECHNOLOGY
AND GADGET**
29%



MALE



FEMALE



**FASHION &
SPORT CLOTHES**
71%



**BILL PAYMENT/
TOP UP**
51%

TRAVEL
41%



**FOOD AND
BEVERAGES**
32%



PERSONAL CARE
32%



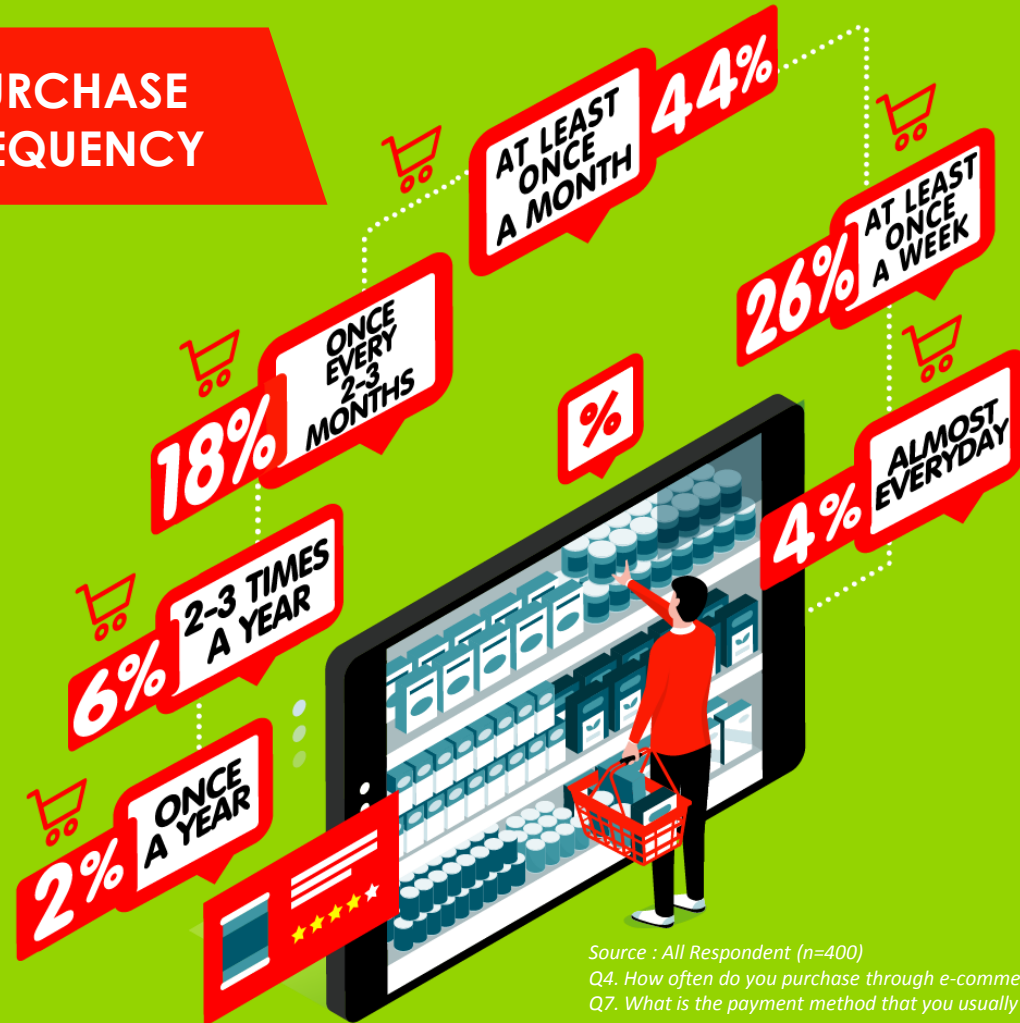
COSMETIC
29%



PURCHASE BEHAVIOR

74% of online shoppers do transaction at e-commerce at least once a month. Debit transfer/internet banking is the most convenient payment method.

PURCHASE FREQUENCY



Source : All Respondent (n=400)

Q4. How often do you purchase through e-commerce sites? SA

Q7. What is the payment method that you usually do to pay at online shop?

PAYMENT METHOD



GAME CHANGERS

PLACE AND TIME TO PURCHASE

Non millennial shoppers usually shop during afternoon to evening.
And do it at home.

**TIME TO SHOP
AFTERNOON
(3PM UNTIL NIGHT)**

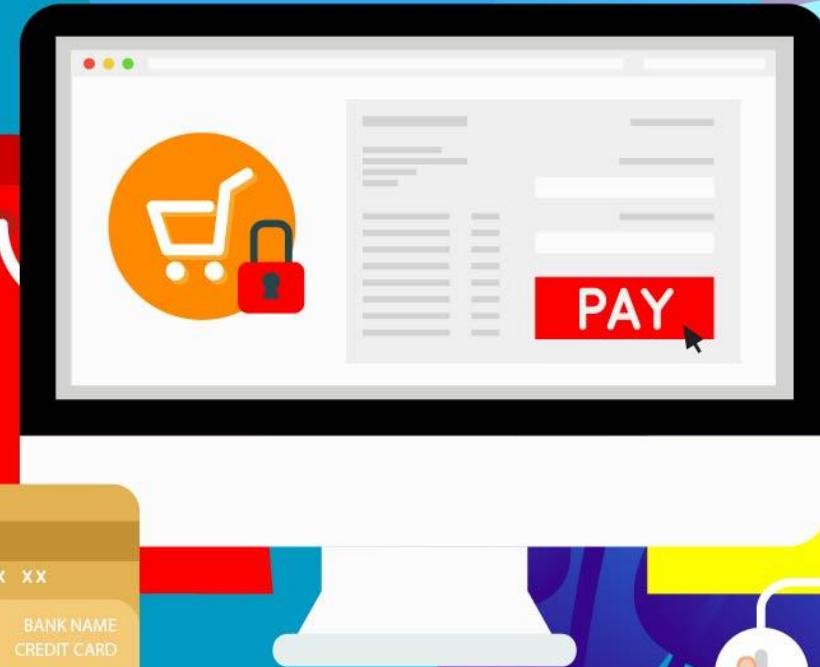
50%

**PLACE OF
PURCHASE:**



AT HOME

74%





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