

INMOBI

Decoding the Connected Southeast Asian Festive Shopper in 2021



Executive Summary

Southeast Asia is one of the most diverse regions across the globe. With a slew of different cultures, ethnicities and identities, there is a reason to celebrate every few weeks during the end of the year. Yet since 2020, the region has faced a very different festive season, one with lockdowns, social distancing, and a more measured outlook.

While these setbacks may have changed the way we live, the spirit of resilience and positivity is stronger than ever before. Consumers continue to plan to shop this year, and have made choices on the categories, the brands and the products they plan to purchase. Undeniably, lockdowns have caused a shift in the behavior of the average consumer, be it making purchases on mobile, or shifting budgets to different channels. We discuss all this and more in our report.



Research Objective

InMobi conducted this research study to better understand the shopping sentiments of Southeast Asian consumers this festive season, aiming to provide marketers deep insights to fine-tune their mobile marketing strategies.

The main objectives of this study were to:

Gain an in-depth understanding of how consumers plan to shop this 2021 Festive Season

Understand the expectations of consumers from online and offline brands/retailers

Capture the mobile moments of truth that matter to Southeast Asian consumers



Research Methodology



An on-device survey
conducted over InMobi
Pulse



A sample of n=6000
Southeast Asian
smartphone users



Respondents recruited via
InMobi’s mobile
programmatic platforms
between August 12th and
Sept 30th, 2021



Results targeted and
weighted to be
representative of
Southeast Asia’s
smartphone population



Paging Southeast Asia

Having added over 70 million new online shoppers¹ since the onset of the pandemic, and over 80% of consumers in the region set to make online shopping as a part of their daily lives, Southeast Asia has emerged as the home of the digital shopper. We discuss the trends that will define Holiday Shopping in Southeast Asia in 2021.

¹ [Bloomberg](#), 31Aug 1, 2021



Understanding Southeast Asia's Festive Shopping Plans

Despite a tough 2021, Southeast Asians are all set to showcase their resilience and embrace this festive season; 33% of Southeast Asians have made concrete shopping plans for the various end-of-year occasions. They plan to purchase a wide range of products including:

- Clothing & Accessories (Clothes, shoes, bags etc.)
- Groceries
- Gadgets (Smartphone, tablets etc.)
- Home Appliances (Televisions, refrigerators, coffee makers etc.)

As we travel across the region, consumers from different countries have different preferences for what they will be purchasing, showcasing how culture can shift purchase preferences.



Source: InMobi Festive Season Consumer Survey, Southeast Asia, 2021

Q. Do you intend to shop this festive season?

Q. Q. What categories of items are you planning to shop for during the festive season? N=2500

Online Shopping is Set to Make Gains

As concerns over social distancing and associated lockdowns continue to stay on top of mind of consumers, online shopping is said to make huge gains in the region. With over 93% of consumers planning to leverage online channels this year, the Southeast Asian economy will play host to a digital festive season.

That's not all, over 24% respondents have doubled down on their digital habits having claimed that they will spend more online, while 47% state that they will be cutting their spends on offline channels. This clearly goes to show in the number of first-time online shoppers that SEA has seen this year.

Shopping Plans by Channel



Shift in Budgets by Channel



Source: InMobi Festive Season Consumer Survey, Southeast Asia, 2021

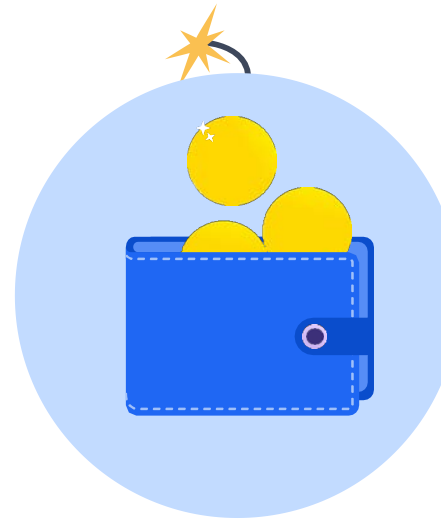
Q. Do you intend to shop this festive season? | Q. Why are you not planning to shop during this festive season?
Q. With the continued threat of COVID-19, how will you shop this festive season? | Q. With respect to last year, how has your budget changed for Online/ Offline shopping? | * defined as having shopped online for the first time online in the last 6 months

Holiday Shopping Plans are Yet to be Finalized

67% of survey respondents shared that they have not finalized their shopping plans this holiday season.

This is due to a variety of reasons, a majority of which can be attributed to COVID and its long-lasting impact. Reduced budgets, safety concerns, and the lack of the right offers are some of the top reasons cited by non-shoppers.

Top 3 Reasons for Not Shopping



Reduced budgets
due to Covid Impact



Safety concerns
due to Covid



Not receiving
relevant offers

Mobile Dominates in the Southeast Asian Shoppers' Journey to Learn, Explore, and Buy!



Learn

39%		Mobile
20%		Desktop
14%		Physical Store
10%		Friends and Families
7%		Television
6%		Newspaper and Magazines
4%		Billboards



Explore

71%		Mobile
14%		Desktop
16%		Physical Store



Buy

69%		Mobile
10%		Desktop
21%		Physical Store

Source: InMobi Festive Season Consumer Survey, Southeast Asia, 2021
Q. Through which channel are you more likely to make a purchase this festive season?
Q. Where do you learn about festive season sales and offers?
Q. Which channel will you use to research or explore for festive season shopping?

Meet Southeast Asia's Holiday Shoppers!

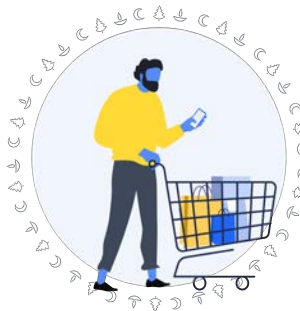
We are seeing the emergence of three key buyer personas for the upcoming holiday shopping:

Bargain Hunters



Shoppers who haven't planned their purchases and are waiting for the best offers

Category Explorers



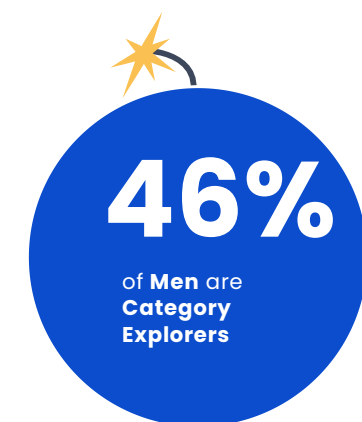
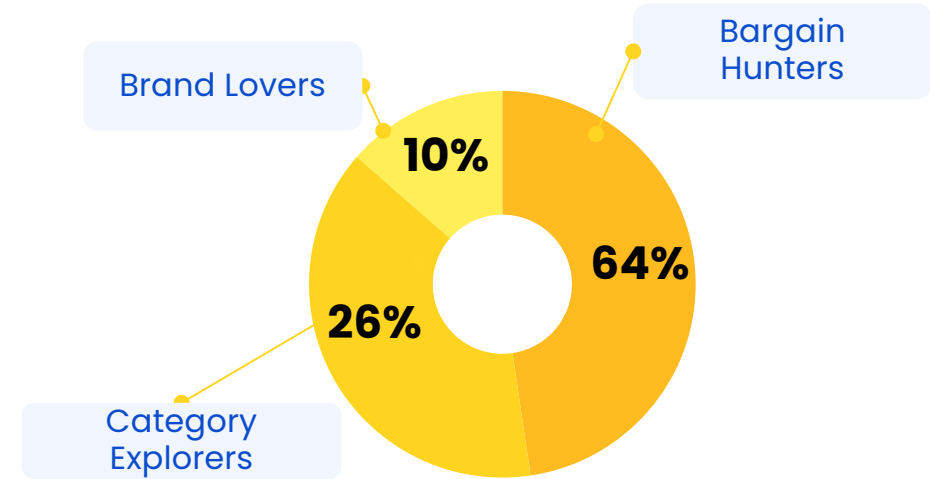
Shoppers who have decided on categories, but not the products or brands yet

Brand Lovers



Shoppers who have already decided the brands and products they will purchase

With close to **64%** of 'undecided' or 'completely unplanned' holiday shoppers, brands have the opportunity to tap into the shopping moments of these consumers.



Halo Indonesia!

As the epicenter of mobile shopping, Indonesia witnessed the highest growth rate in SEA in the population of digital consumers. What does this mean for the end of the year shopping bonanza in the archipelago?



Halo Indonesia!

The 2021
Festive Season

Trends and Opportunities

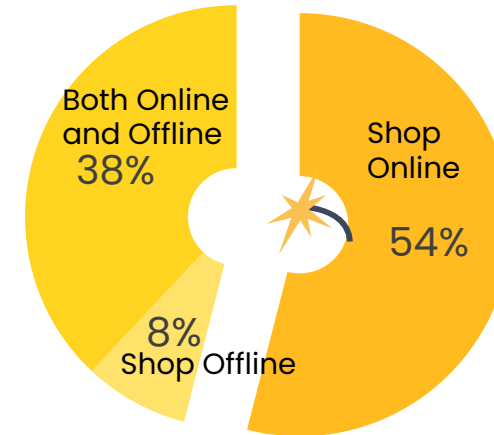
Online Shopping Takes the Cake

Home to some the world's most dynamic superapps, Indonesia has leapfrogged the desktop era to become truly mobile-first. This is evidenced in the shopping plans by channel of the average Indonesian shopper, with over 92% intending to buy online this Festive Season

That's not all, over 20% of respondents have doubled down on their digital habits having claimed that they will spend more online, while 50% state that they will be cutting their spends on offline channels.

37%
respondents are
**first-time
shoppers***

Shopping Plans by Channel



Shift in Budgets by Channel



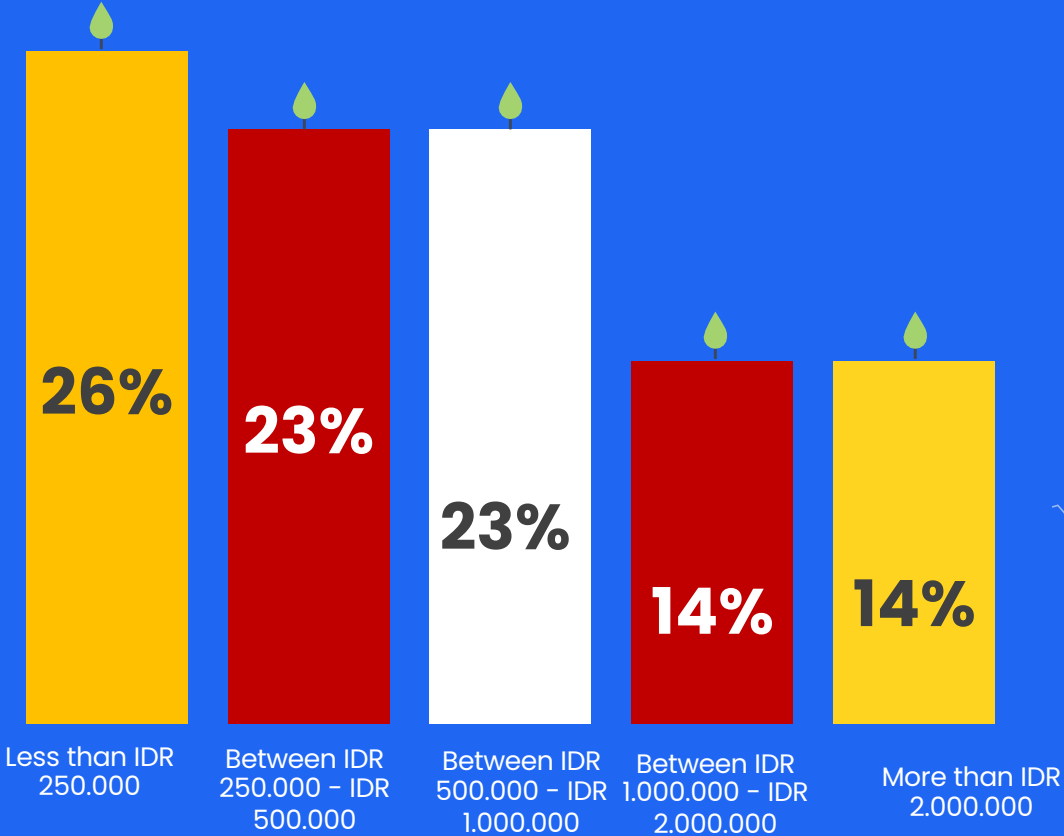
Source: InMobi Festive Season Consumer Survey, India, 2021

Q. Do you intend to shop this festive season? | Q. Why are you not planning to shop during this festive season?

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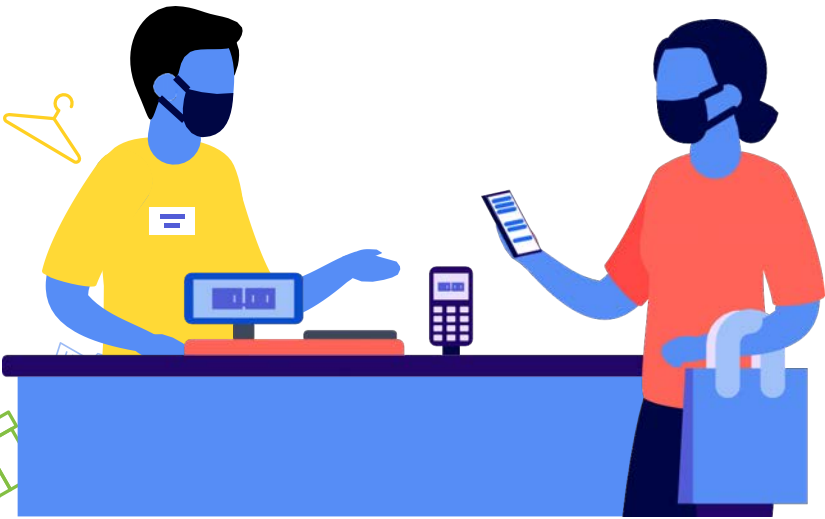
Indonesia's Purse Strings Opens this Holiday Season

The return of positive sentiment is reflective in the budgets of Indonesians this year. The average spends stand at **IDR 515,284** in 2021. In fact, 51% of Indonesians will spend more than IDR 500,000, showcasing a massive growth in budgets.









Source: InMobi Festive Season Consumer Survey, India, 2021
Q. When do you expect to start planning your festival season shopping for this year

Mobile Dominates in the Shoppers' Journey to Learn, Explore, and Buy






Learn

- 37%  Mobile
- 23%  Desktop
- 14%  Physical Store
- 8%  Friends and Families
- 7%  Television
- 6%  Newspaper and Magazines
- 4%  Billboards






Explore

- 71%  Mobile
- 12%  Desktop
- 17%  Physical Store



Buy

- 69%  Mobile
- 11%  Desktop
- 20%  Physical Store

Source: InMobi Festive Season Consumer Survey, India, 2021
Q. Through which channel are you more likely to make a purchase this festive season?
Q. Where do you learn about festive season sales and offers?
Q. Which channel will you use to research or explore for festive season shopping?

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Halo Indonesia!

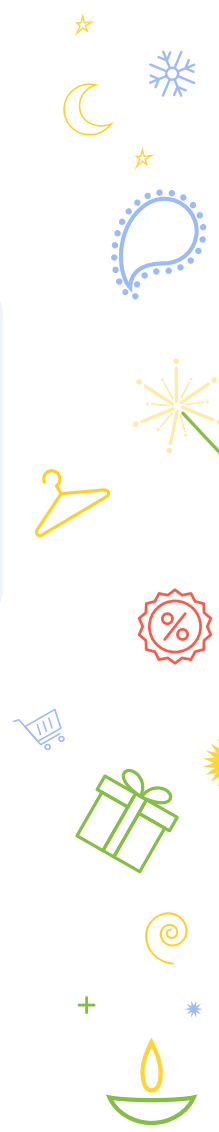
The 2021 Festive Season:
Meet the Shoppers!
Bargain Hunters



Clothing and accessories will be the center of attention for both men and women

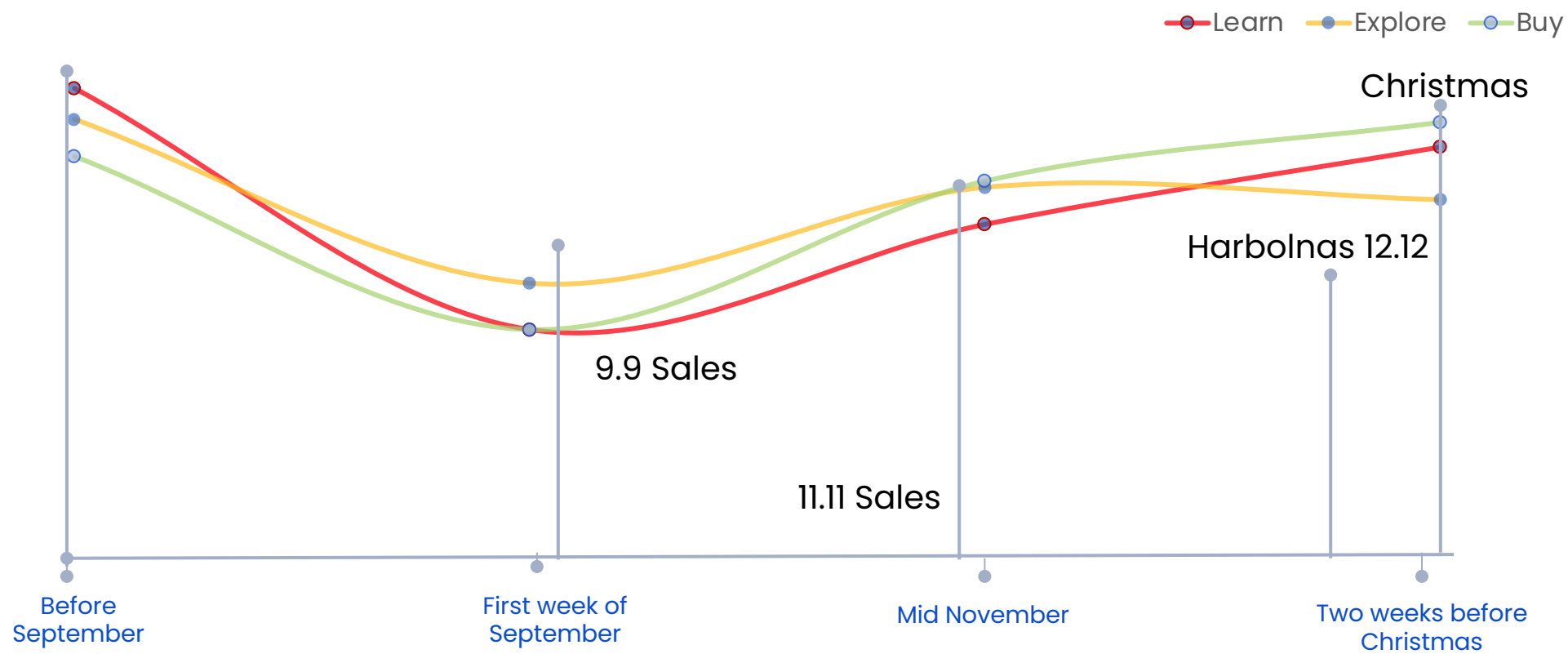
Source: InMobi Festive Season Consumer Survey, India, 2020
Q. Which categories are you planning to spend the most on this festive season?

Top Shopping Categories for Bargain Hunters



Learning, Exploring, and Buying Go Together for Bargain Hunters

The majority of Bargain Hunters are always on the lookout for the best deals throughout the festivities, which leads to their purchase patterns to peak during the most important online sales.



Source: InMobi Festive Season Consumer Survey, India, 2021
Q. When do you expect to start planning your festival season shopping for this year

Halo Indonesia!

The 2021 Festive Season:
Meet the Shoppers!

Category Explorers



Gadgets and Apparel
will be the center of
attention for men
and women

Top Shopping Categories for Category Explorers



1



34%
Clothing &
Accessories

2



28%
Gadgets

3



13%
Groceries



1



41%
Clothing &
Accessories

2



21%
Beauty Products

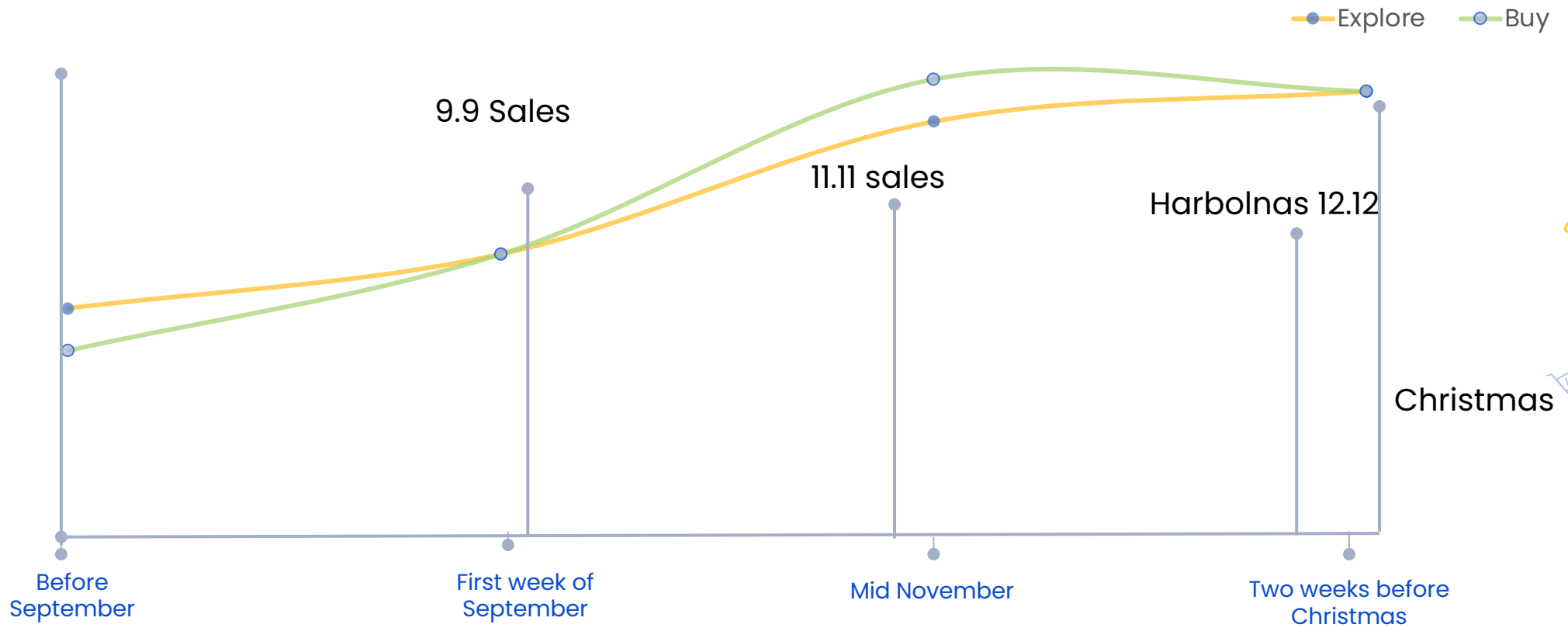
3



20%
Groceries

Category Explorers are Most Active During the Singles' and Doubles' Day Sales

Having already decided on what categories they plan to purchase, shopping and exploring peak closer to the online sales days for Category Explorers.





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Halo Indonesia!

The 2021 Festive Season:
Meet the Shoppers!

Brand Lovers

Gadgets, Apparel and Gift Packs rule the shopping list of Brand Lovers

Top Shopping Categories for Brand Lovers



1



31%
Home Appliances

2



20%
Clothing & Accessories

3



16%
Gadgets



1



33%
Gadgets

2



19%
Clothing & Accessories

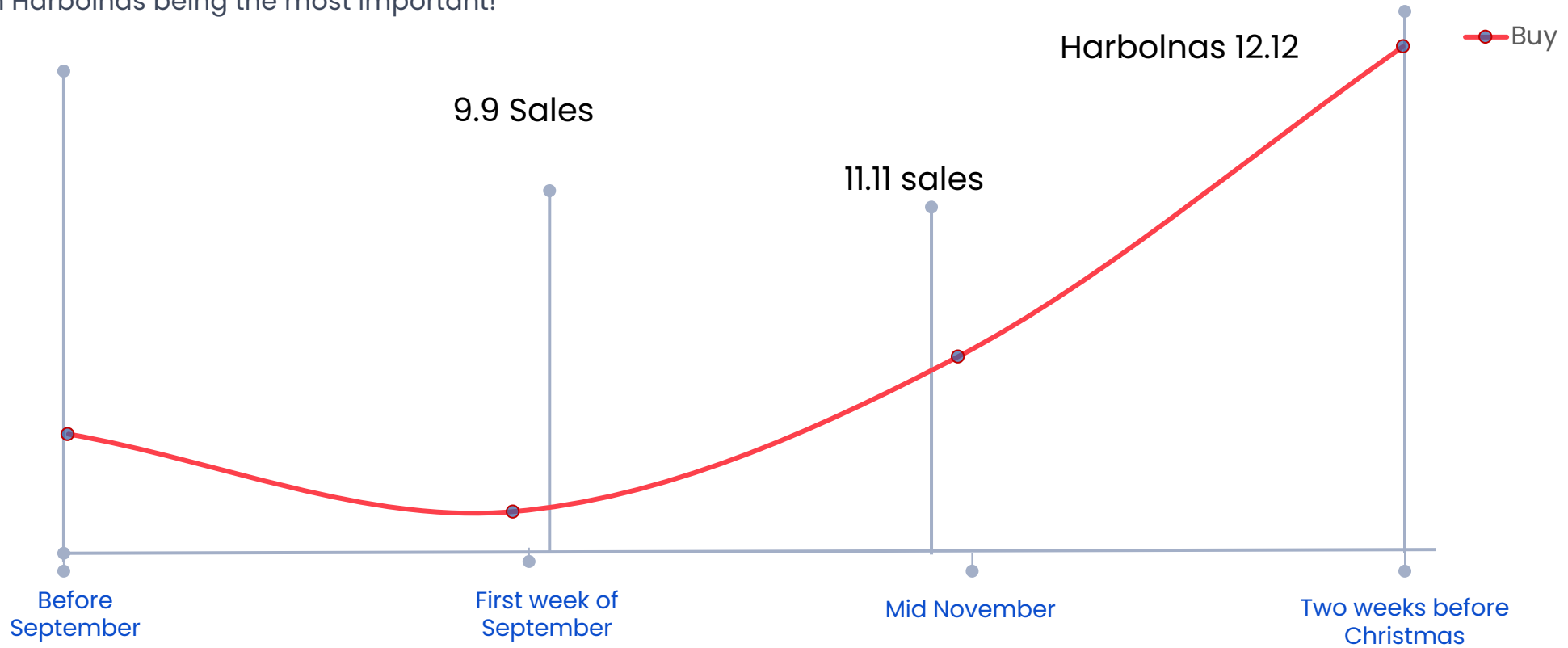
3



19%
Gift packs

Shopping for Brand Lovers will peak ahead of Christmas

Having finalized not only which categories, but also which brands they'd like to purchase, Brand Lovers have only final task left – place their orders! Brand Lovers start making their purchases during the mega shopping festivals, with Harbolnas being the most important!



Uniquely Singapore!

According to eMarketer, between 2015 to 2019, the retail ecommerce sales in Singapore grew by an average of 15%. However, between 2019-2020, in the background of the pandemic, retail e-commerce sales grew from \$1.86B to \$3.24B, charting a growth of 73%. What does this mean for the holiday shopping season in the island nation?

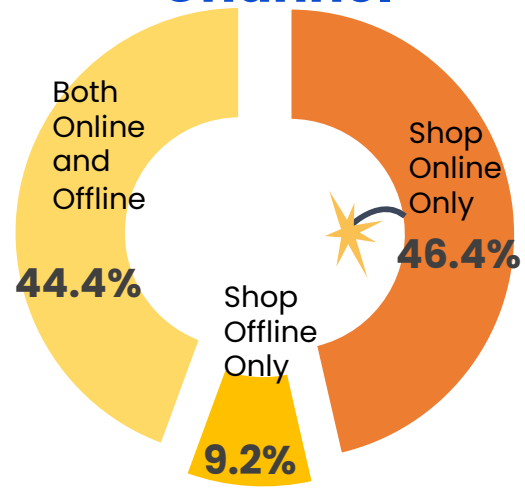


Online Shopping Paves the Way

With Singapore adopting a variety of social distancing measures over the past few months, consumers are opting for an online shopping festival this year. Over 90% of consumers will opt to make online shopping a major part of their shopping plans this year

That's not all, over 34% respondents have doubled down on their digital habits having claimed that they will spend more online, while 35% state that they will be cutting their spends on offline channels.

Shopping Plans by Channel



Shift in Shopping Budgets by Channel due to Covid



Source: InMobi Festive Season Consumer Survey, Singapore, 2021
 Q. Do you intend to shop this festive season? | Q. Why are you not planning to shop during this festive season?
 Q. With the continued threat of COVID-19, how will you shop this festive season? | Q. With respect to last year, how has your budget changed for Online/ Offline shopping? | * defined as having shopped online for the first time online in the last 6 months

Singapore Shoppers Embrace Spontaneity

68% of survey respondents shared that they they have not finalized their shopping plans this year

This is due to a variety of reasons, a majority of which can be attributed to COVID and its long-lasting impact. Reduced budgets, safety concerns, and the lack of the right offers are some of the top reasons cited by non-shoppers.

Top 3 Reasons for Not Shopping



Reduced budgets due to Covid Impact



Safety concerns due to Covid

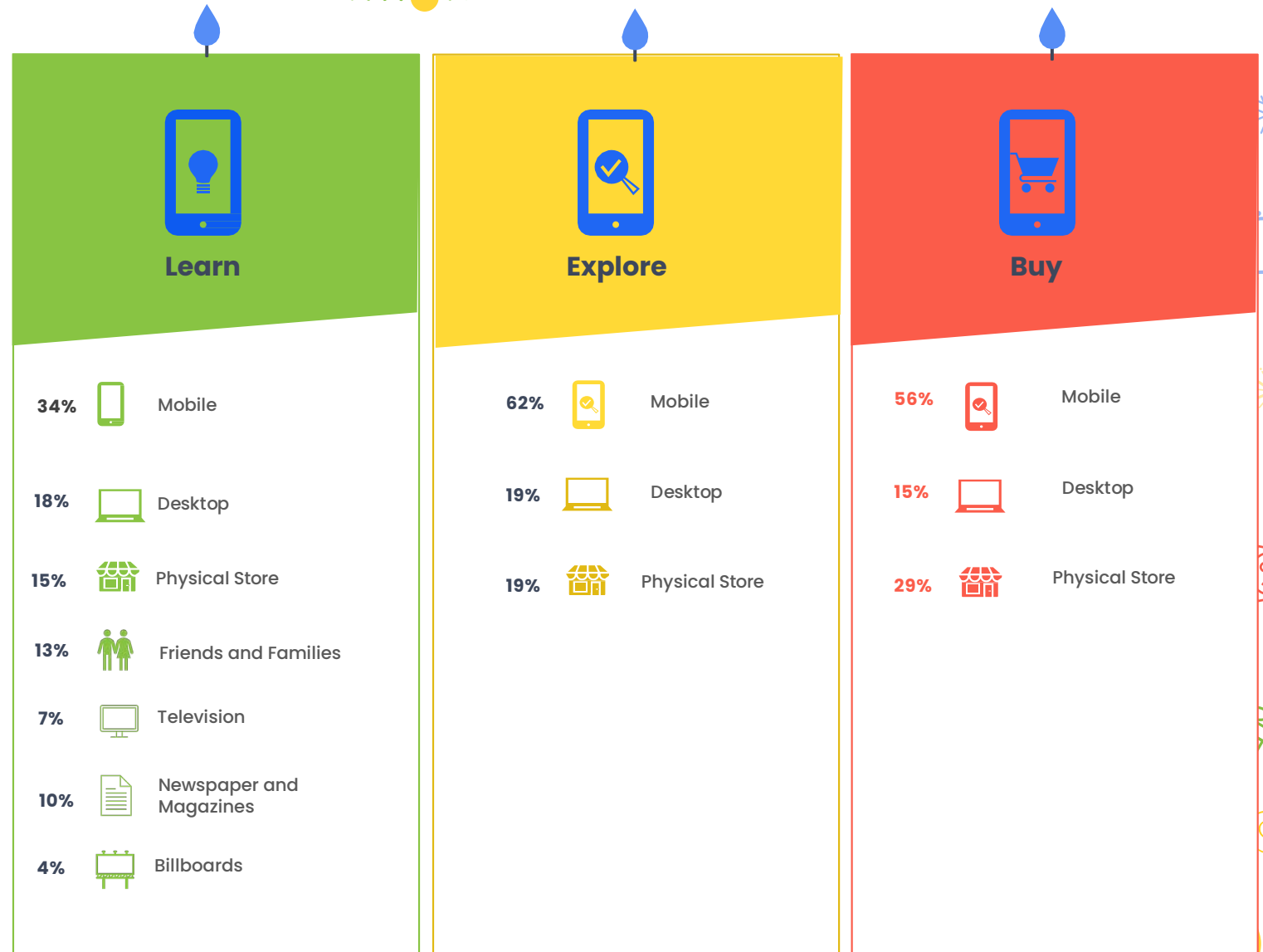


Not receiving relevant offers

Mobile Dominates in the Shoppers' Journey to Learn, Explore, and Buy.

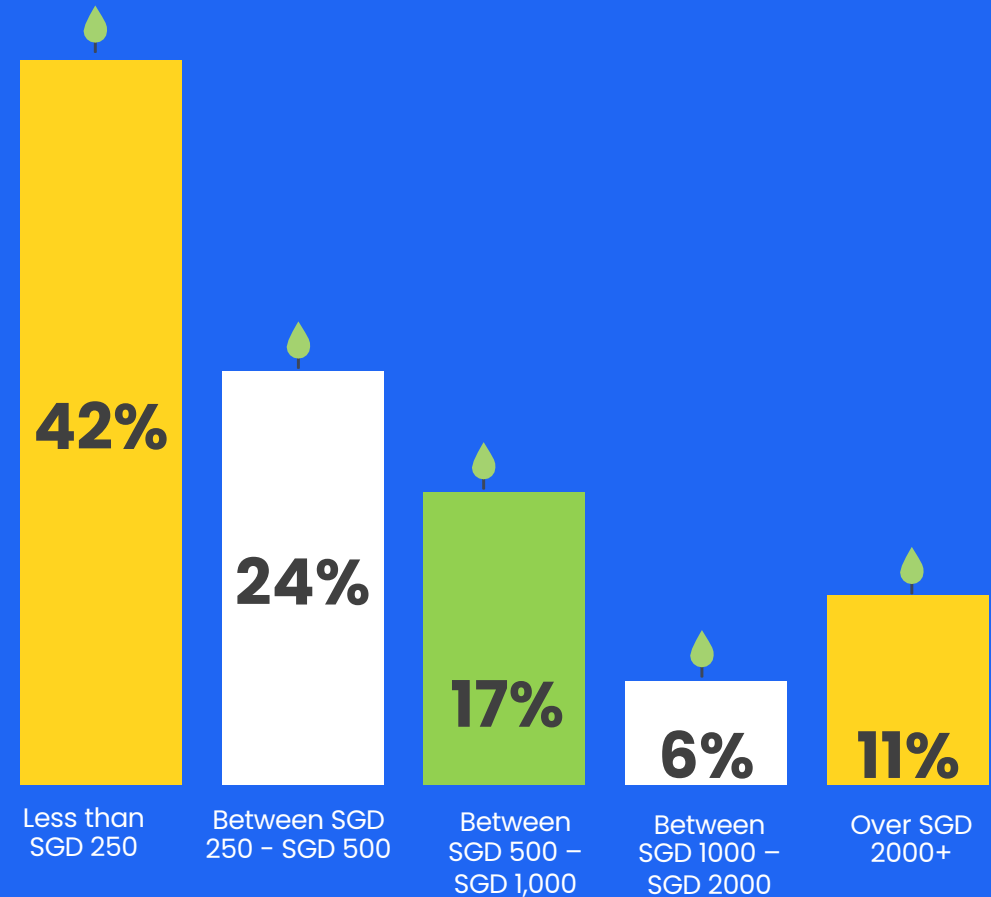
According to eMarketer, Mobile will account for 63% of all online retail sales in Singapore in 2021

Source: InMobi Festive Season Consumer Survey, Singapore, 2021
 Q. Through which channel are you more likely to make a purchase this festive season?
 Q. Where do you learn about festive season sales and offers?
 Q. Which channel will you use to research or explore for festive season shopping?



Holiday Budgets Zoom Ahead

While Singapore continue to remain cautious this Festive Season, the average spend expected will be **SGD 336**. Yet the spirit of resilience is undeniable as 34% of Singaporean shoppers will spend more than SGD 500 this holiday season and as astounding nearly 1 in 5 consumers will spend more than SGD 1000.



Source: InMobi Festive Season Consumer Survey, Singapore, 2021

Q. When do you expect to start planning your festival season shopping for this year



Apparel, Groceries and Gadgets emerge as the top shopping categories in Singapore

Top Shopping Categories in Singapore





Clothing and accessories will be the center of attention for both men and women

Source: InMobi Festive Season Consumer Survey, Singapore, 2021
Q. Which categories are you planning to spend the most on this festive season?

Top Shopping Categories by Gender



1



33%
Gadgets

2



32%
Clothing & Accessories

3



23%
Home Décor



1



42%
Clothing & Accessories

2



33%
Groceries

3

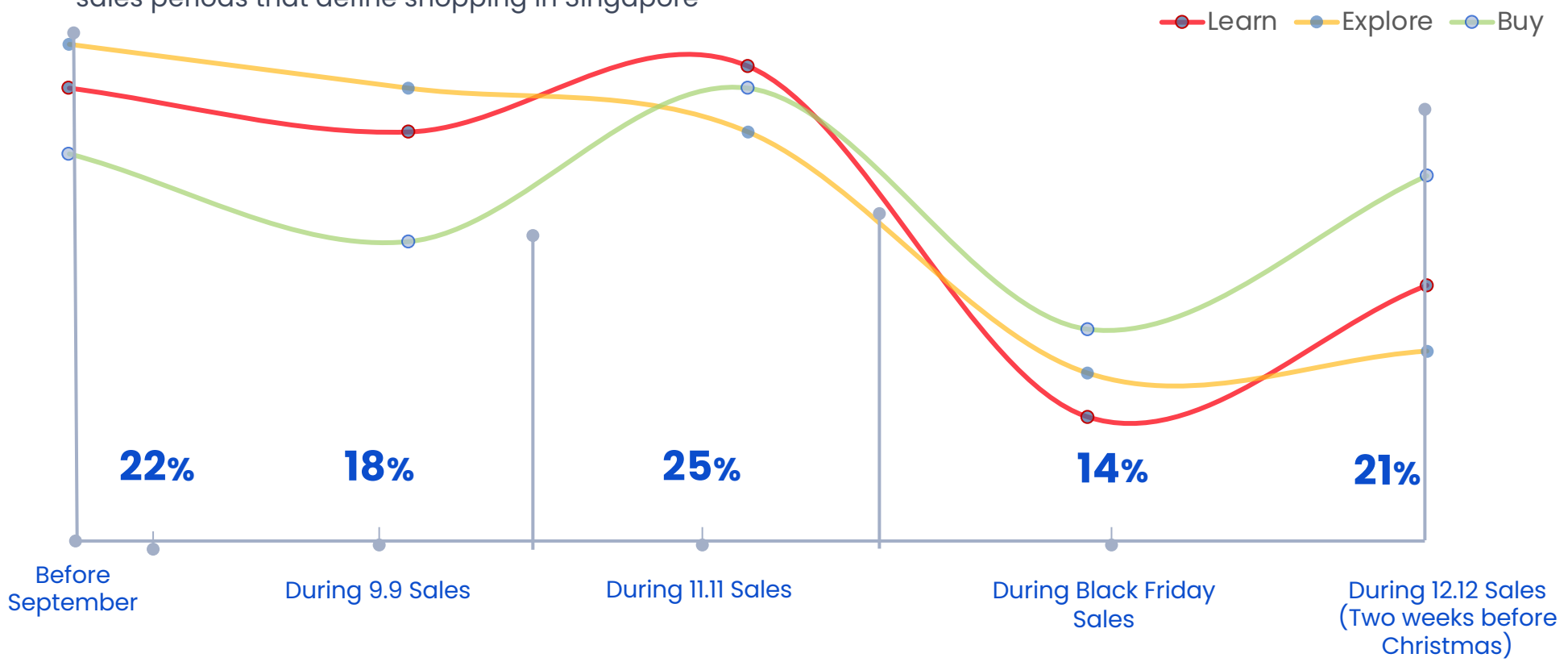


29%
Beauty Products



The Learn, Explore, and Buy Journey for the Singapore Mobile Shopper

The majority of Singaporeans are on the lookout for the best deals throughout the festivities, which leads to their purchase patterns to peak during the iconic sales periods that define shopping in Singapore



Source: InMobi Festive Season Consumer Survey, Singapore, 2021
Q. When do you expect to start planning your festival season shopping for this year

Hola Philippines!

According to a recent study by Visa, 52% of Filipinos shopped online through apps and websites for the first time during the pandemic. Additionally 9 in 10 have increased their online shopping activity during the pandemic. How will this affect Filipinos who celebrate the longest Christmas Season across the globe which starts at the beginning of September?



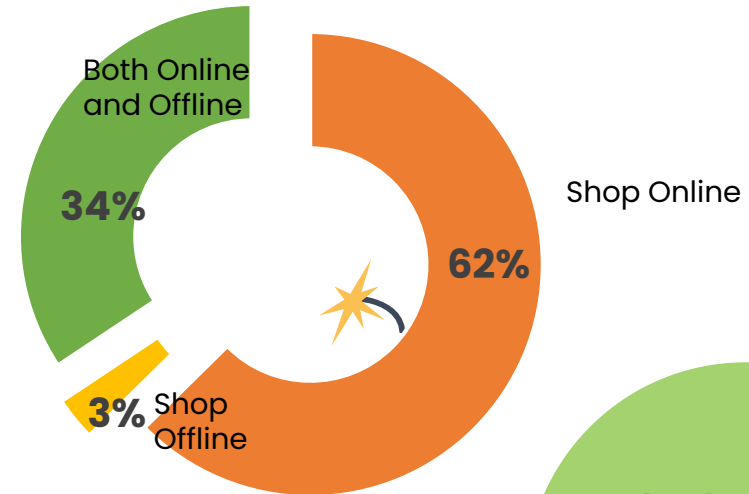
Mothers turn to Online Shopping this Ber Season!

As the primary influencers of purchases made during the much-awaited Ber Season, mothers are looking to make smarter shopping decisions in 2021.

In the face of multiple lockdowns, online shopping has become the channel of choice for mother across the Philippines with over 97% of Filipina mothers planning to center their Christmas shopping this year on online channels.

This has naturally led to a shift in the allocation of budgets. Online Shopping will begin to command a lion's share of budgets this Festive Season. The average Filipina family will spend over PHP 7627.

Shopping Plans by Channel for Moms



Shift in Budgets by Channel for Families



Source: InMobi Festive Season Consumer Survey, Philippines, 2021

Q. Do you intend to shop this festive season? | Q. Why are you not planning to shop during this festive season?

Q. With the continued threat of COVID-19, how will you shop this festive season? | Q. With respect to last year, how has your budget changed for Online/ Offline shopping? | * defined as having shopped online for the first time online in the last 6 months

A warm, festive photograph of a family celebrating Christmas. In the center, a wrapped gift in grey paper with a large silver bow sits on a table. A child's hand reaches towards the gift. To the right, a golden retriever dog is visible, its head near the gift. The background is decorated with red tinsel and a string of warm white lights. The overall atmosphere is cozy and celebratory.

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Hola Philippines!

The 2021
Festive Season
Meet the Families!

Festive Shopping will be a last – minute affair for Families

We are seeing the emergence of 3 key buyer personas for the upcoming festive shopping:

Bargain Hunters



Shoppers who haven't planned their purchases and are waiting for the best offers

Category Explorers



Shoppers who have decided on categories, but not the products or brands yet

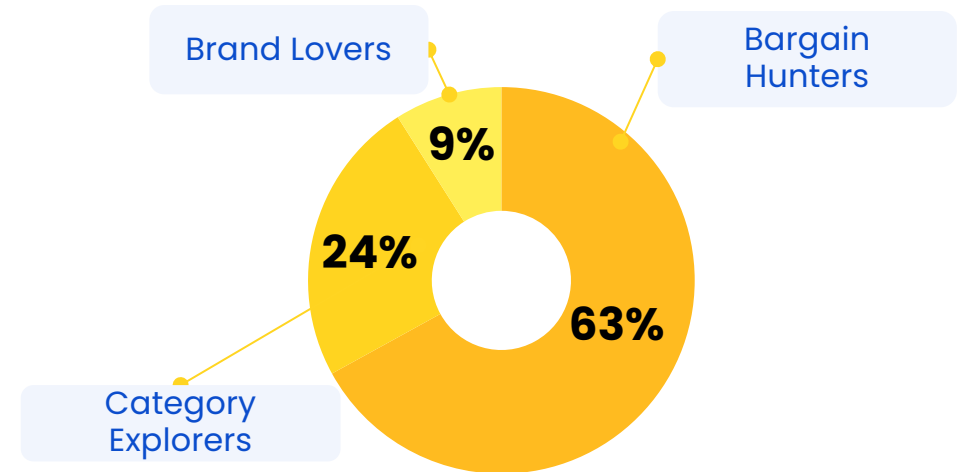
Brand Lovers



Shoppers who have already decided the brands and products they will purchase

With close to **63%** of 'undecided' or 'completely unplanned' festive shoppers, brands have the opportunity to tap into the shopping moments that matter for these consumers.

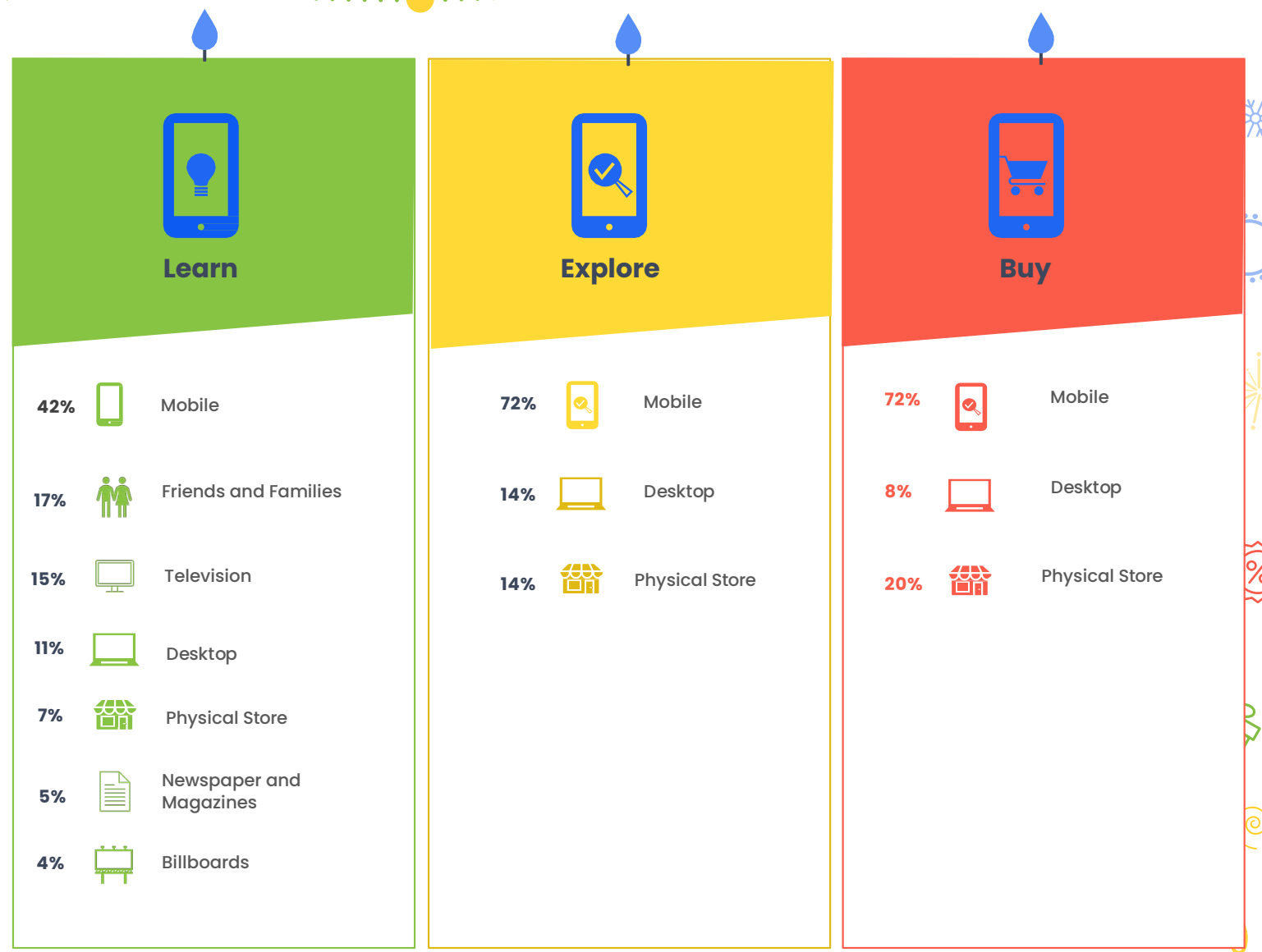
Source: InMobi Festive Season Consumer Survey, Philippines, 2021
Q. What do you plan to shop for this festive season?



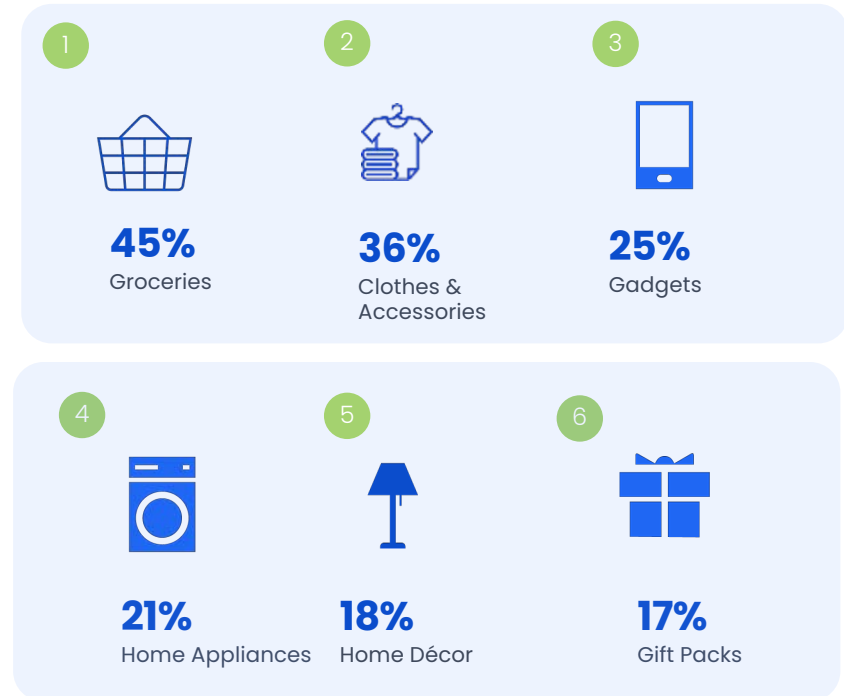
Mobile Dominates in the Shoppers' Journey to Learn, Explore, and Buy For Filipinos



Source: InMobi Festive Season Consumer Survey, Philippines, 2021
Q. Through which channel are you more likely to make a purchase this festive season?
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Q. Which channel will you use to research or explore for festive season shopping?

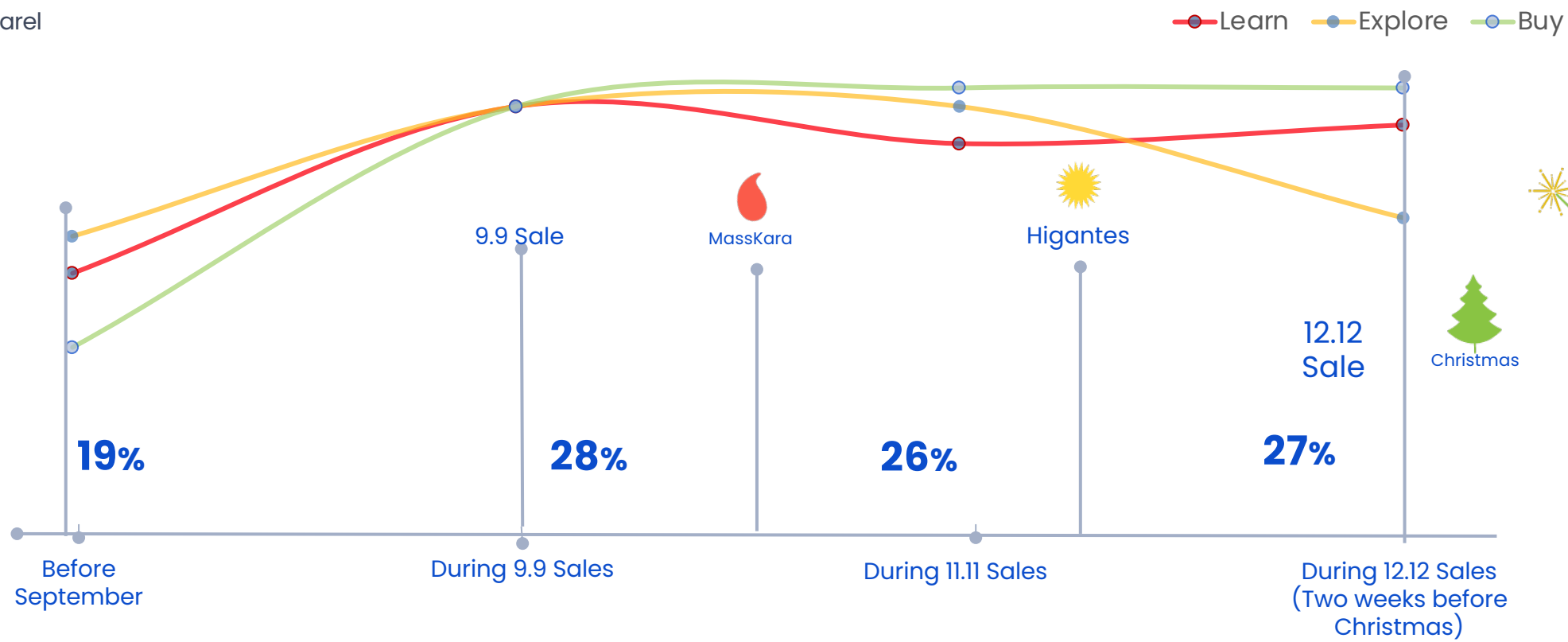


Season Consumer Survey, Philippines, 2021
 Planning to spend the most on this festive season



Learning, Exploring, and Buying Go Together for Families

The majority of families are always on the lookout for the best deals throughout the festivities, which leads to their purchase patterns to consistently peak during sale periods. We saw this in play last year, with Shopee claiming to have sold 12 million items in the first 24 minutes of their Double's Day Sale, with top purchases covering home and living items, mobile accessories, and apparel



Source: InMobi Festive Season Consumer Survey, Philippines, 2021
Q. When do you expect to start planning your festival season shopping for this year

How Brands can Plan for a Blockbuster Season

The 2021 Holiday Season will see Four Trends



**1. Learning,
Exploring,
Buying On the
Go**



**2. Same
Traditions,
Different
Means**



**3. Phenomenal
Surge in Online
Shopping**



**4. Selective Store
Footfalls**

Get Your Mobile Audience Strategy Right in line with the New Normal Consumer Habits



1.5x to 2x
growth rate in online women
shoppers compared to men
in 2020*

Moms

Home Makers

2.5x
share of age 45+ online
shoppers in 2020 vs 2018*

Gen Z

Gen X

Gen Y

Working Professionals

Shopping Mall Visitors

Retail Store Visitors

Auto Store Visitors

Competitor Store Visitors

Jewelry Store Visitors

Online Shopper

Online Transactors

Gaming/ Sports Enthusiasts

Lifestyle Enthusiasts

Content (News, OTT,
Short-form video)
Bufs

Demographic Signals

App Usage Signals

Location Signals

Combined Signals

Guide Families using Household Targeting along their Festive Shopping Journey

- Cross-device
- Audience Reach Extension
- Online/ Offline Attribution

One Household Segment

The Family as a Decision-Making Unit

Initiator, Buyer, Influencer, User



Many Audiences in a Household

Moms

Elderly

Coffee Shop Visitors

Working Professionals

The 3-Stage Creative Formula for Brands

1 Tease

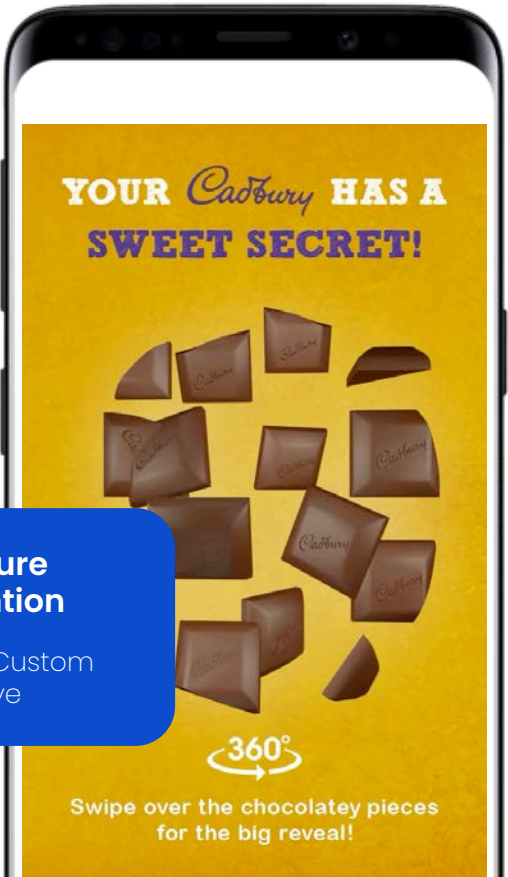
Custom Creative to spark curiosity

2 Launch

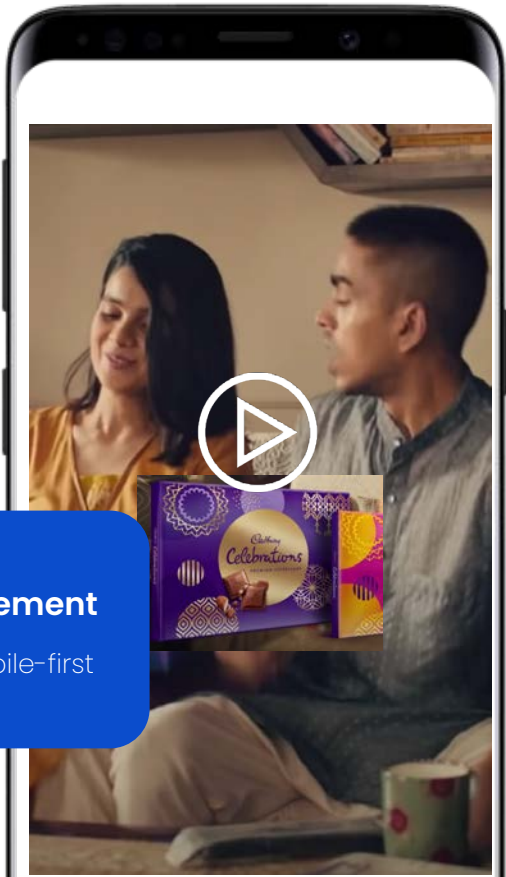
Immersive Video for reach, completes and engagement

Always-on Re-engage

Sequential Storytelling to enhance brand affinity



Capture Attention
Using Custom Creative

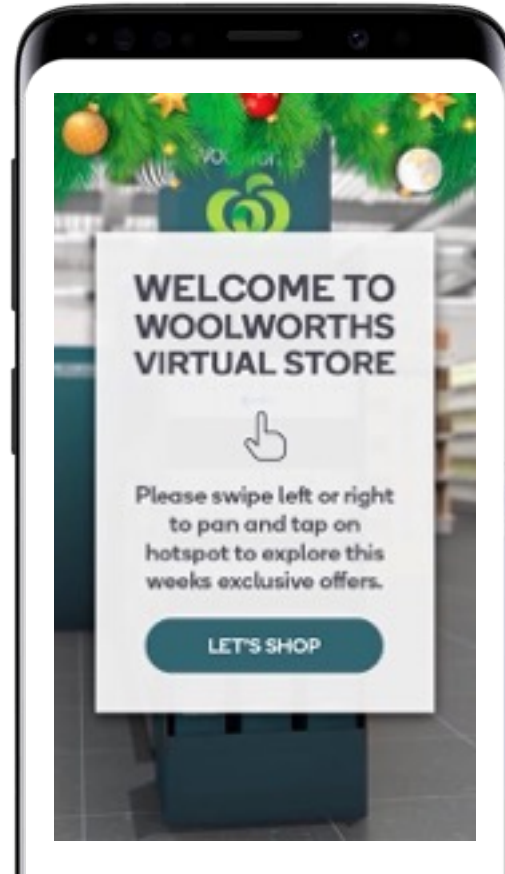


Better Engagement
With Mobile-first Videos

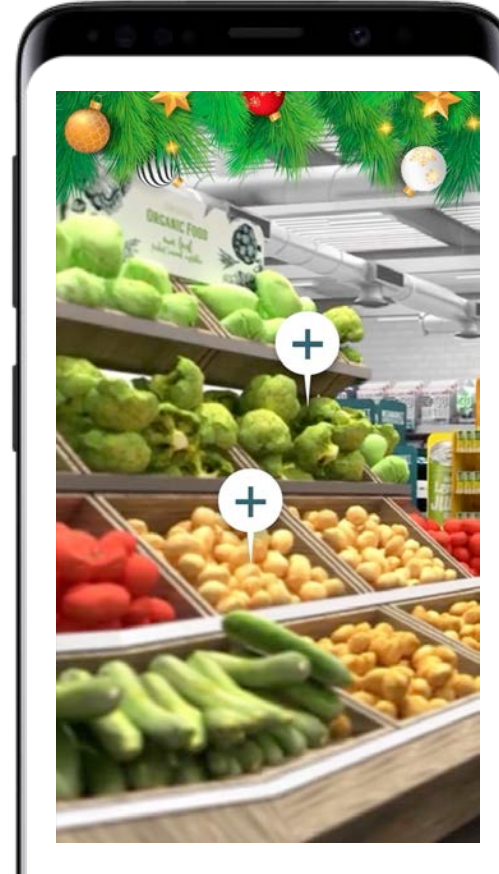


Personalization at Scale
Using data-driven marketing

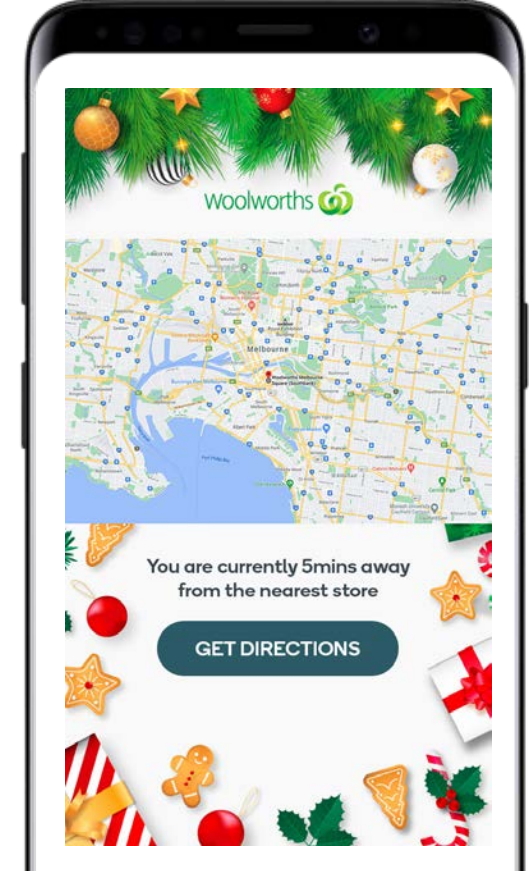
Capture Intent with Shoppable Online-to-Online and Online-to- Offline Experiences



**Offer Details
+ Store Locator**



**360° Store Tour
+ Store Card Call Out**



**Recall Builder Video + Product
Carousel for Awareness**

The Festive Marketer's Guide to Winning this Season

**Understand
Consumer
Sentiment**

**Identify and
Reach your
Consumers
Effectively**

**Engage your
Consumers
with
Immersive
Experiences**

**Close the Deal
in the Critical
Mobile
Moments of
Truth**

InMobi is a leading provider of marketing and monetization technologies. With deep expertise and unique reach in mobile, it is a trusted and transparent technology partner for marketers, content creators and businesses of all kinds. InMobi's mission is to power its customers' growth by helping them engage their audiences and build meaningful connections. Its affiliated businesses – Glance, an unconsolidated subsidiary that offers a lock screen-based content discovery platform and video platform Roposo – help InMobi create new content and commerce experiences in a world of connected devices.

Interested in learning more? Write to us at mobilemarketing@inmobi.com



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