Brand.com and Marketplace in the evolving online path to purchase

January 2021

Prepared by Google, Ipsos and SixthFactor

CONTENTS

Research Approach and Methodology

	Qualitative Approach	Quantitative Approach
Sample/ Method	One-to-one in-depth interactions with shoppers, approx. 60 mins per session Total of 24 interactions (8 interactions in each of these 3 markets: Singapore, Thailand, Indonesia) Consumer tech and household appliances coverage only	25 minute online surveys conducted across 4 categories (Consumer tech, home appliance, beauty and apparel) across 3 markets: Singapore, Thailand, Indonesia Total sample size n=3600 Market sample size n=1200 per market
Fieldwork period	29th July – 14th August 2020	30th October - 22nd November 2020

Definitions used throughout this report

Brand.com refers to official brand websites

Marketplace refers to online e-commerce platforms which sells multiple product categories from a variety of sellers or brands

Disclaimer

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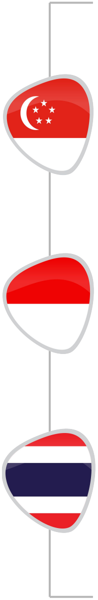
Reference

This report is a research program launched by Google with Ipsos and SixthFactor in 2020. The research uses consumer interviews and surveys to provide insights on brand websites and marketplace roles in the context of the consumer journey. Report is sources as "Google, Ipsos, SixthFactor, Brand.com and Marketplace in the evolving online path to purchase, 2020".

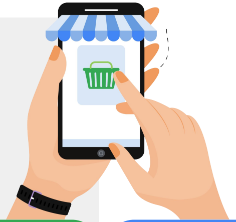
Category coverage across 3 markets, 4 categories



	Qualitative Approach	Quantitative Approach
Consumer tech	n=12 interviews (n=4 interviews in each market)	n=1800 Smartphone n=600 PC/Laptop n=600 Other technology n=600
Home appliance	n=12 interviews (n=4 interviews in each market)	n=600 Small appliances n=300 Large appliances n=300
Beauty	No interviews	n=600
Apparel	No interviews	n=600

Increasing adoption of online shopping accentuated by COVID-19 has ignited a greater inspection into the roles of brand websites and marketplaces.

The research aims to understand in the context of the consumer purchase journey...



Role of brand websites (brand.com) & perceived importance amongst shoppers

Role of marketplace & perceived importance amongst shoppers

...and understand where the future lies for these touchpoints in the online retail ecosystem

Executive Summary

Chapter 1: Key takeaways for Brand.com, Marketplace and vertical differences.

The power of a brand-led shopping experience is more in demand as shoppers continue to push their entire shopping journey online.

BRAND.COM EXECUTIVE SUMMARY

Future growth opportunity is ripe for brand.com

Across categories, brand.com is in a strong position to grow in SEA. Among marketplace buyers, future intention to use brand.com as a conversion channel is 1.22x higher than survey average. 55% of shoppers have used brand.com throughout the path to purchase journey.[1] This is a clear indication the role of brand websites will continue to play a role in the consumer purchase journey.[2]

Brand.com provides a unique immersive brand experience

Brand.com has an advantage over marketplace in offering experiential shopping. Brands needs to provide an interactive and positive experience to win over shoppers. 41% of brand.com shoppers indicated that brand.com gives them an immersive experience (compared to 35% of marketplace users). This demonstrates that an immersive brand experience is relevant in an online setting.[3]

Brand.com is able to command a higher price premium from shoppers

Although shoppers look for brand.com to provide competitive pricing strategies, purchases via brand websites are able to command a higher value from shoppers. Brands can avoid competing on price with marketplaces and instead, provide exclusive deals or additional services (e.g. warranty).[4]

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[1] Refer to slide 23 within this report for referenced data point

[2] Refer to slide 13 within this report for referenced data point

[3] Refer to slide 18 within this report for referenced data point

[4] Refer to slide 17 within this report for referenced data point

Brands need to continually invest in brand.com to provide shoppers a more *assured* and *immersive* brand experience that is relevant to the right audience.

BRAND.COM EXECUTIVE SUMMARY

Website experience is key to retain buyers and attract non-buyers

The key drivers for using brand.com are clear product specs, an immersive experience with clear product photos and videos. Brand.com buyers and non-buyers will make judgements on the same website experience points, hence it is critical for brand.com to ensure these hygiene needs are continually being met across the whole purchase funnel.[4]

A localized brand website provides greater authenticity and trust

A key barrier to using brand.com, particularly evident from non-English markets, is the absence of local language options from product specs to delivery. This contributes to some issues of trust and reliability with brand.com. Longevity in an online space is dependent on connecting with shoppers in a relevant manner.[5]

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[5] Refer to slide 27 within this report for referenced data point

[6] Refer to slide 28 within this report for referenced data point

Marketplace is a force in the online retail ecosystem; this is mainly driven by value and convenience.

MARKETPLACE EXECUTIVE SUMMARY

Marketplace is an emerging platform in online retail

Across categories, marketplace is in a strong position to further grow in SEA. 33% of shoppers have purchased from marketplace.[6]

Marketplace offers a convenient shopping experience

Marketplace's unique advantage as a retail platform gives shoppers the ability to explore a variety of brands and product categories. The mobile apps supports a seamless shopping user interface that makes it easy to search, explore and browse on-the go. Marketplace is also focused on transactions with saved personal account details such as delivery address, payment details, providing a smooth check out process.[7]

Price is the key drawcard for marketplace, but lowest price does not guarantee authenticity

Marketplace is able to deliver on price, offering attractive concessions (e.g. cashback, flash sales etc.). However, this raises concern over authenticity of sellers and products, lack of warranty and after-sales service. Shoppers purchase with a heightened sense of perceived risk - 31% cite authenticity as a key issue on marketplace.[8]

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[7] Refer to slide 32 within this report for referenced data point

[8] Refer to slide 34 within this report for referenced data point

[9] Refer to slide 39 within this report for referenced data point

Marketplaces have room to further deliver on *assurance* and *experience*, and brands can offer greater leadership to demonstrate these values.

MARKETPLACE EXECUTIVE SUMMARY

Marketplaces are part of a wider omni-channel strategy for brands

As part of a wider online omni-channel strategy, marketplaces offer brands an opportunity to reach a variety of shoppers. Brands can utilise the flagship store on marketplaces as 51% of shoppers recall purchasing from a brand flagship store within marketplaces. This is a clear indication that consumers tend to look for signs of a brand's official presence on marketplace, offering a voice of authenticity and credibility.[9] However, continual investment into official brand websites are still required as there is higher trust with brand websites.

Deliver assurance and confidence with verified, authentic, safe-for-delivery, safe-for-payment certifications

Mitigate risks associated on marketplace by enhancing its features of 'Official store', 'Verified seller', as well as stronger features that support the after-sales service around returns/ refunds/ exchanges.[10]

Augment marketplace listings with distinctive advantage, price savings info, and mention product details

Make it easy to compare products by having detailed product listings on marketplace with visuals/ videos. Provide better quality reviews on product use and experience.[11]

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[10] Refer to slide 40 within this report for referenced data point

[11] Refer to slide 41 within this report for referenced data point

[12] Refer to slide 41 within this report for referenced data point

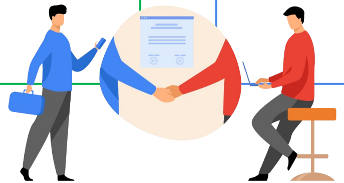
KEY TAKEAWAYS

Brand websites are able to deliver holistic and immersive brand experiences and be a voice of authenticity for shoppers.

Brands need to continually invest in official websites to build relationships with shoppers in a fast moving online retail environment.

Marketplace has a unique strength in delivering a convenient shopping experience.

However, there are room for improvement to deliver assurance and authenticity.



Brands and marketplaces can coexist in the online retail ecosystem and do not need to compete with each other as each have unique offerings.

As part of a wider omni-channel strategy, brand.com should not be neglected and partnerships with marketplaces can be strengthened to capture more shoppers across the purchase pathway.

Chapter 2
Brand.com Story

Brand.com Provides a Holistic End-to-End Journey for Shoppers

Among marketplace buyers, future intention to use brand.com as a conversion channel is

1.22x*

higher than survey average.

This demonstrates the continual need for brand.com to invest in brand websites as shoppers rely on brand.com in the purchase journey.

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements. E9. Thinking about your future purchases of [product], How likely are you to use each of these online channels in each stage of your purchase journey? *compared to Marketplace, across all categories and markets

"For big ticket items above S$1,000, I would prefer to buy from brand.com. I feel more assured about the product authenticity and also, in case of any issues, I know I can go back to the brand directly."

SG Brand.com shopper

1.25x

Assured me that the information was correct and true

1.12x

Gave me an understanding of the whole brand

Importance of touchpoints^
brand.com compared to marketplace

This indicates that brand.com is poised for strong future growth.

^Index of Brand.com rating against Marketplace amongst all respondents, all categories

Key needs expressed along the e-commerce path-to-purchase showcase shoppers willing to invest time in the upper and mid funnel.

"It took me around 2 weeks to make a decision. I took quite a long time researching on the brands, comparing options before I finally decided on the product that I wanted to get."

SG Marketplace shopper

Upper Funnel

Authenticity

Seek the confidence and affirmation of making the right/ best choice by taking pains to research and evaluate all available options.

Brand.com assured me that this product was trustworthy or authentic - **42%**

Brand.com assured me that the information displayed was correct & true - **41%**

Immersion

Immerse in the shopping experience, take time to enjoy the process by exploring and deliberating on the product, considering options before purchase.

Brand.com gave me the complete understanding of the whole brand - **37%**

Facilitation

An external push to trigger the shopping consideration, and support needed throughout the shopping journey to make decisions and close the purchase loop.

Brand.com helped me decide on the best product for me - **30%**

Convenience

Look for features that ease the shopping process through filtering options, support decision making and help complete the purchase as quickly as possible.

Brand.com was a seamless experience from searching, payment and checkout - **34%**

Mid and Lower Funnel

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements.

Brand.com is well placed to deliver more assured and immersive experience, in the upper and mid funnel.

Assurance

Brand.com provides the assurance of having made the right choice, more so for the high investment purchases.

Brand.com assured me that this product was trustworthy or authentic - **42%**

Brand.com assured me that the information displayed was correct & true - **41%**

Immersion

Brand.com delivers an immersive, experiential shopping, providing a complete shopping experience

Brand.com gave me the complete understanding of the whole brand - **37%**

“I have confidence when buying from brand.com, as I know the product will definitely be authentic, in good condition, if I buy directly from manufacturer.”

TH brand.com shopper

“I just enjoy looking at all these aesthetics on [consumer electronics brand] website. I think I went into the website several times — maybe four times — to see if there’s an emotional connection with the product. That was the day I thought, okay, I’m just going to get it.”

SG brand.com shopper

By providing an immersive shopping experience in upper and middle funnels...

Engaging content for immersive experience

Animations, clear photos and video provide an impressive experience

Professionally shot images, 360 degree view of product also add to the positive brand image.

Motivations across the purchase journey

MOTIVATIONS (among buyers)

Upper Funnel		Middle Funnel	
Price deals / promotions	69% ↓	**Clear product specs**	**57% ↑**
Product reviews	55%	Deals / promotions / discounts	39%
Product specs via photos	**45% ↑**	**Clear product video/photos**	**35% ↑**
General product specs	44%	Compare products from the same brand	34% ↑
Product specs via videos	**35% ↑**	Easy to navigate	32% ↑

↑/↓ Brand.com is significantly higher/lower than Marketplace (MP)

ACTION POINTS: Brand.com provides a more immersive and experiential shopping experience - especially in an online setting. Brands need to provide an interactive brand experience to demonstrate brand value and win over more shoppers.

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
B4. What are the main reasons for using / visiting [RESPONSE FROM B2]? C5. What are the main reasons for using touchpoints

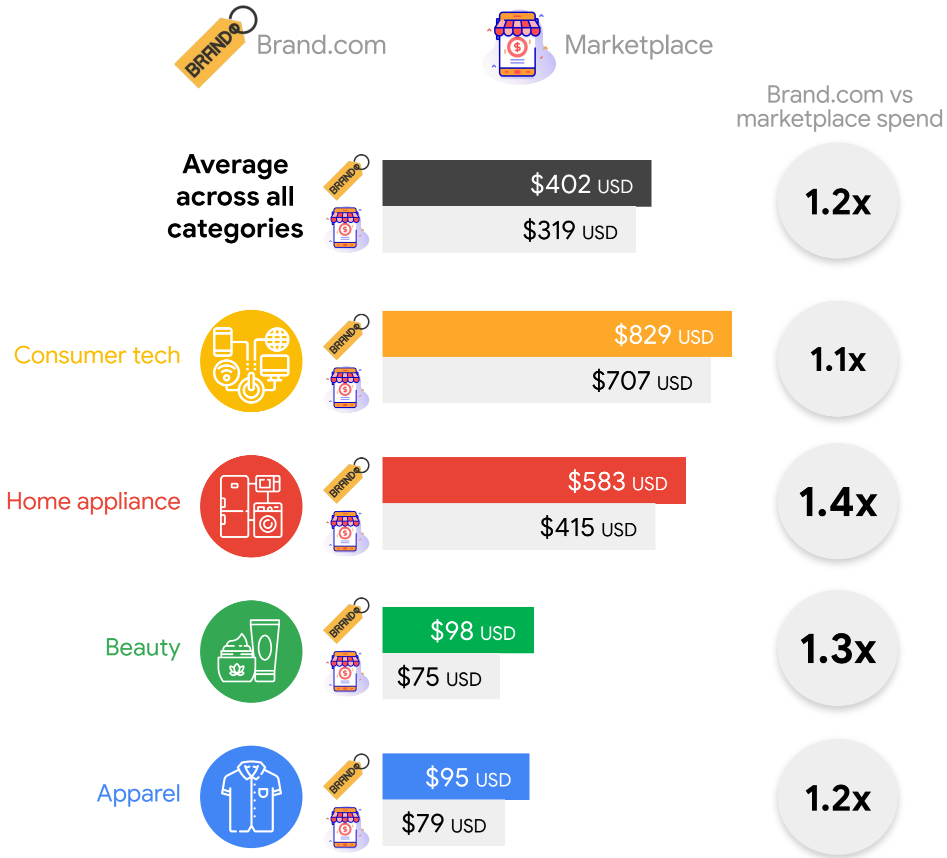
...Brand.com has the ability to command a 20% higher spend premium from shoppers.

Shoppers are assured that the product they receive from brand.com is authentic, and in case of any issues, they can return to the official seller for warranty and after-sales services. Hence, willing to pay a premium on brand.com.

Brand.com that offers extended warranty, or looser terms for refunds/ exchanges also command a premium e.g. product is open and used but in good condition can still be returned as opposed to marketplace where product has to be returned in sealed condition.

> **"I checked the prices and brand.com is 2-3% more expensive compared to marketplaces, but for the 14-day change-of-mind returns policy it offers, it is worth it."**
>
> *SG Brand.com shopper*

Average claimed spend across categories



Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200,
Spend S10. When you purchased item(s) from each of the categories, how much did you spend? For each purchase, please indicate how much money you spent.

Ease of navigation & detailed product information also contributes to an immersive experience.

Comparison function for decision-making

Easy to compare between models on brand.com when viewed side by side with details of product specs.

Intuitive product categorisation for easy navigation

Easy to find the product on brand.com due to clear categorisation .

Motivations across the purchase journey

MOTIVATIONS (among buyers)

Upper Funnel		Middle Funnel	
Price deals / promotions	69% ↓	Clear product specs	57% ↑
Product reviews	55% ↓	Deals / promotions / discounts	39%
Product specs via photos	45% ↑	Clear product video/photos	35% ↑
General product specs	44%	**Compare products**	**34% ↑**
Product specs via videos	35% ↑	**Easy to navigate**	**32% ↑**

"I liked the comparison function on [brand.com website]... I could select two models and they will pull out a side-by-side table comparison for me to see the differences between the two models."

TH Brand.com shopper

Brand.com gave me a complete understanding of the whole brand

41% 35%

Brand.com users vs. Marketplace users

ACTION POINTS: Brand.com can provide functions to allow shoppers to easily compare and intuitive product categorisation will lead to an enhanced experience.

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
B4. What are the main reasons for using / visiting [RESPONSE FROM B2]?
C5. What are the main reasons for using touchpoints?

↑/↓ Brand.com is significantly higher/lower than Marketplace (MP)

The point of difference for brand.com is the ability to provide product assurance & after-sales support in lower funnel.

Motivations across the purchase journey

MOTIVATIONS (among buyers)

Lower Funnel	
Price discount	44% ↓
Genuine/Authentic products	**25% ↑**
Refund/exchange service	**23% ↑**
Membership rewards/points	22%
Warranty service	22%

↑/↓ Brand.com is significantly higher/lower than Marketplace (MP)

Assurance on product authenticity drives conversion on brand.com

> **"I have confidence when I am buying directly from the manufacturer. They can't run away if there are any issues on their product since it's their brand name at stake."**

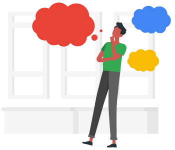
TH Brand.com shopper

After-sales support is a differentiator for Brand.com

Assurance that there is after-sales support in case of on any issues e.g. product warranty. Offering easy exchange or returns (no questions asked returns).

ACTION POINTS: Do not compete on price at the lower funnel. Instead, offer shoppers an authentic brand experience where credibility and trust are key indicators of a successful and satisfactory brand experience. Exclusive deals & additional warranty are also ways to demonstrate value.

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
E2. What are the reasons why you did not purchase from ["Official Brand Website" OR "marketplace platform"] ... during this purchase occasion?



CONSUMERS' PERCEPTIONS OF TOUCHPOINTS

What are the key opportunities for brand.com? How can brand.com leverage its unique role for shoppers?

Markets differ in core orientation towards online shopping; role and opportunity of brand.com varies.

SINGAPORE

Here 'value definition' goes beyond mere price - authenticity and experience matters

Sophisticated brand.com shopping landscape, strongly competing with marketplace.

THAILAND

Customer service is a perceived differentiator - an opportunity for developing competitive advantage.

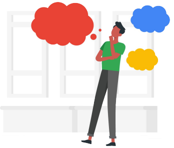
With a developing brand.com landscape, wide preference for marketplace and retailers with strong online presence.

INDONESIA

Structurally predisposed and oriented towards marketplace conversion - brand.com has regulatory limitations.

Brand.com conversion rare, mobile-first market means most shopping journeys are marketplace app oriented.

ACTION POINTS: Given the varying levels of brand.com shopping landscape across the markets, there is a need to adopt a localised strategy that is relevant to the shoppers.



CONSUMERS' PERCEPTIONS OF TOUCHPOINTS

	SINGAPORE		INDONESIA		THAILAND	
	Brand.com	Marketplace	Brand.com	Marketplace	Brand.com	Marketplace
Influence rating measured against average of all touchpoints	1.03x	1.09x	1.08x	Not significant	Not significant	1.01x
Usage rating measured against average of all touchpoints	1.5x	1.6x	1.15x	2.3x	1.4x	1.4x

Singapore: A clear differentiation and role of brand.com is needed to compete for shoppers' attention.

Indonesia: Brand.com is poised for strong growth due to strong influence and future usage willingness.

Thailand: Both brand.com and marketplace have opportunities to further create value for shoppers.

Despite regulatory limitations in ID, brand.com has a sizable opportunity in ID.

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
E6. Please give a rating for each of the following platforms with Highly influential (1) as having the most influence on your purchase journey and Not at all influential (5) as having no influence.
E7. Which of the following platforms did you use most often during each of the key stages of your purchase journey? Please select one for each of the stages.
Index created for E6 measured on top 2 box rating measured against all touchpoints. E7 index created measured against all touchpoints - average scores used

Brand.com still needs to show up at moments of deliberation.

In the upper funnel, **brand.com is frequented less as a touchpoint when shoppers are exploring brands available** in the category.

Driving awareness on brand at this stage is essential to future growth. Being present early on in the purchase journey is paramount to driving awareness and brand visibility.

Middle funnel can also be strengthened to driver greater consideration.

Overall, 55% of shoppers have used brand.com throughout the path to purchase journey.*

"When I am not sure what brands are in the category, I search on Google or on marketplace to get an idea of the top brands in the category."

ID marketplace shopper

Touchpoint usage across purchase journey

	Brand.com	Marketplace
Upper Funnel	9%	27%
Middle Funnel	34%	60%
Lower Funnel	31%	47%

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
B2. Think about the very first moment when you decided to buy [Category], please select the first place you visited.
C4. Can you indicate all the things that you have done prior to your last purchase related to [Product]
S6a (S20PIPEIN). Within the past 6 months, where did you purchase the following categories? Please select all that apply for each of the categories.
*This indicates the overall usage score across the path to purchase

Brand.com can elevate influence in the decision making process with Google and YouTube by providing authenticity and immersive experience needs.

Google

Assurance

Provides multiple sources to allow cross-checking and validation of product specs and reviews.

"When I am not sure what the specs mean, I use Google to search to get some quick answers and understanding."

ID marketplace shopper

Immersion

Provides variety of content for shoppers to engage in the shopping process.

"I spend time just searching on Google for different reviews, and looking at different opinions, pictures, videos to decide which model I should get."

SG brand.com shopper

YouTube

Assurance

Provides content that explains product specs and demonstrates user experience, giving shoppers assurance on their product decision

"I watch YouTube videos to get a better sense of the product design, colour, touch and feel... some things you can only see through videos, especially if you can't go in store."

MY marketplace shopper

Immersion

YouTube video content helps augment shopper engagement with for choice-making and product usage experience.

"I already know the specs, but I just want to watch the videos on YouTube to see and experience the design and the colours."

MY brand.com shopper

In upper funnel stage, price and availability are key barriers for not using brand.com as a touchpoint.

Overall barriers across the purchase journey

BARRIERS (among non-buyers)

25% **Availability**

19% **Price**

Upper Funnel		Middle Funnel	
The product I wanted was not listed on the local brand website	25%	Prices were too expensive	19%
Prices were too expensive	20%	Delivery issues (cost, no options)	19%
I want to compare different brands	19%	Brand website does not show user reviews	16%
Product videos+photos issues	18%	Product videos/photos issues	15%
Brand website was in foreign language	18%	The product I wanted was not listed on the local brand website	14%
Brand website does not show user reviews	17%		

Highly price-sensitive shoppers are dissuaded from using brand.com

A common perception is that prices on brand.com are often **more expensive compared to marketplace**, hence deterring shoppers from considering the channel.

"It is commonly known that brand.com is always the most expensive. So I will check and use it as a benchmark, knowing that the prices in marketplaces will definitely be cheaper."

ID Marketplace shopper

ACTION POINTS: Despite price barriers, brand.com should not compete on price with marketplace as brands can provide perks that are not easily measured in monetary terms to attract shoppers ~ a better online shopping experience with interactive website and high quality visuals/videos, a professional delivery service, or a better after-sales service.

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
B5. What are the reasons for not visiting/using ["Official Brand Website" or "marketplace platform"] when you first decided you want to buy the product?
C9. What are the main reasons for not using ["Official Brand Website" OR "marketplace platform"] to search or evaluate products?

Lack of clear and reliable information on brand.com is a key barrier in lower funnel.

Overall barriers across the purchase journey

BARRIERS (among non-buyers)

26% **Product Information**

Lower Funnel

Product information was not clear or detailed enough	**26%**
Expensive delivery / shipping costs	22%
Product information was not reliable	**21%**
No promotions, deals or discount	19%
Not reliable/ trustworthy	14%
Product not available	14%
Higher price compared to other websites / platforms	14%

Not all brand.coms provide a strong positive experience

Categorization of products is not immediately intuitive and shoppers do not know where to navigate to find specific items.

> **"I don't think I can find the product that I want on brand.com... I am looking for a vacuum cleaner, but the categories they have are 'Sound & Vision', 'Personal Care'... It is easier for me to search on Marketplace and all the results will pop out."**
>
> *ID Marketplace shopper*

ACTION POINTS: YouTube can help shoppers get more detailed information and a 'feel' of the products they're interested in.

> **"If it was possible, I would have gone to the store to get a look and feel of the product. Because of COVID-19, I used YouTube to watch the video reviews, to get a sense of the size, feel and material from the videos."**
>
> *ID Marketplace shopper*

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
E2. What are the reasons why you did not purchase from ["Official Brand Website" OR "marketplace platform"] ... during this purchase occasion

Focus on providing an experiential shopping experience to win over non-buyers.

Buyers and non-buyers evaluate brand.coms on the same aspects ~ detailed product info, photos and videos, ease of navigation.

Motivations/barriers across the purchase journey

MOTIVATIONS (among buyers)

Upper	Price setting	69% ↓
Upper	Product reviews	55% ↓
Upper	**Product specs via photos**	**45% ↑**
Upper	General product specs	44%
Upper	**Product specs videos**	**35% ↑**
Middle	**Clear product specs**	**57% ↑**
Middle	Deals / promotions / discounts	39%
Middle	**Clear product video/photos**	**35% ↑**
Middle	**Compare products**	**34% ↑**
Middle	**Easy to navigate**	**32% ↑**
Lower	Price discount	44% ↓
Lower	Genuine/Authentic products	25% ↑

BARRIERS (among non-buyers)

Upper	Prices were too expensive	20%
Upper	**Product videos photos issues**	**18%**
Upper	**Brand website does not show user reviews**	**17%**
Middle	I want to compare different brands	28%
Middle	Prices were too expensive	19%
Middle	**Website was not suitable for inspiration**	**19%**
Middle	**Product videos/photos issues**	**15%**
Lower	**Product info was not clear**	**26%**
Lower	**Product info was not reliable**	**21%**
Lower	No promotions, deals or discount	19%

ACTION POINTS: What non-buyers consider as barriers are the same as what motivates buyers. Hence, brand.coms need to focus on the aspects of an immersive shopping experience to retain buyers and attract non-buyers.

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
B4. What are the main reasons for using / visiting [RESPONSE FROM B2]? B5. What are the reasons for not visiting/using [“Official Brand Website” OR “marketplace platform”] when you first decided you want to buy the product? C5. What are the main reasons for using touchpoints? C9. What are the main reasons for not using [“Official Brand Website” OR “marketplace platform”] to search or evaluate products? D6. What were the main reasons for purchasing this item, [PRODUCT], specifically from [PIPE IN CODE FROM D3]? What are the key reasons for using this website or app? E2. What are the reasons why you did not purchase from [“Official Brand Website” OR “marketplace platform”] ... during this purchase occasion

Localisation is key for brand.com - particularly important for non-English speaking markets.

Barriers across the purchase journey

BARRIERS (among non-buyers)

Upper	Brand website was in foreign language	8%	21%	23%
Middle	The product I wanted was not listed on the local brand website	10%	16%	17%
Lower	Product information was not clear or detailed enough	15%	29%	24%
	Product information was not reliable	13%	20%	23%

“On YouTube, I watch a mix of local and international review videos... I tend to prefer videos that are in local language, as it means the product is most likely available for sale locally as well.”

ID marketplace shopper

ACTION POINTS: Provide a brand experience in local language to offer shoppers the opportunity to interact and understand the brand on their terms. Depending on the brand’s local growth strategy, connect with shoppers with the right information in local language to create greater relationships with shoppers.

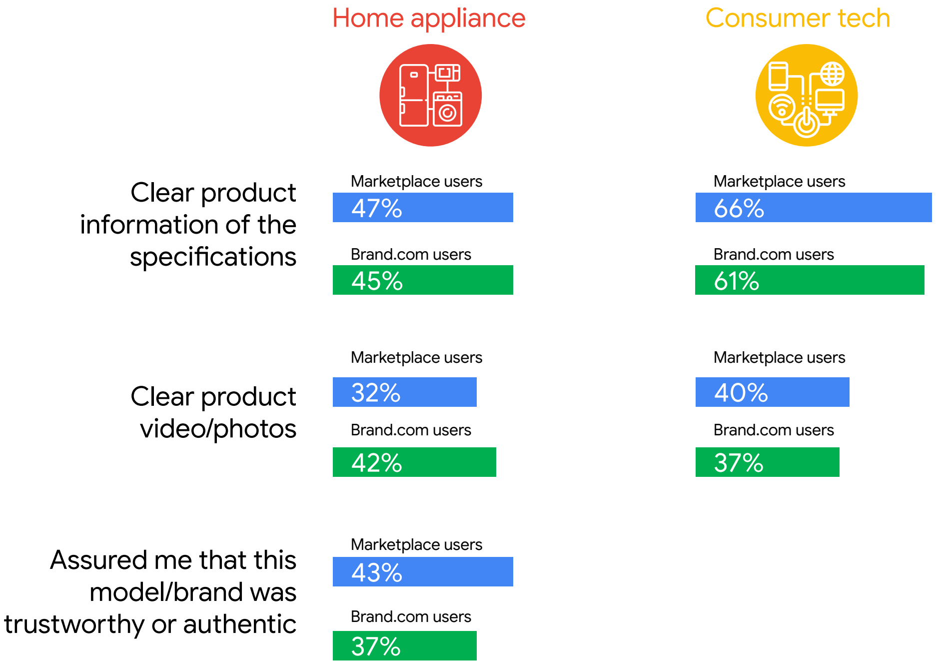
Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200

E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements.

Brand.com still required in high involvement categories, demonstrating shoppers' need for assurance.

Marketplace users still rely on brand websites for clear product information - especially where information needs are high.

Perceptions of **brand.com** by marketplace users at mid funnel stage



Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements.

BRAND.COM KEY TAKEAWAYS

Future growth opportunity is ripe for brand.com

Across categories, brand.com is in a strong position to grow in SEA. Brand building is also key to ensure shoppers are exposed to the brand, regardless of their eventual checkout location.

Brand.com is able to command a 20% higher price premium from shoppers

Purchases via brand websites are able to command a higher value from shoppers. Instead of competing on price, brands can offer exclusive deals and additional services (e.g. extended warranty) to demonstrate value.[13]

Brand.com has a unique opportunity to provide an immersive brand experience

Brand.com has an edge over marketplace in offering experiential shopping. Brands needs to provide an interactive and positive customer engagement to win over shoppers. This will demonstrate brand value and a holistic brand experience in an online setting.

Website experience is key to retain buyers and attract non-buyers

The key drivers for using brand.com are product specs, an immersive experience with clear product photos & videos. Brand.com buyers and non-buyers alike will judge brand.com on the same points. It is critical ensure these needs are continually being met.[14]

A localized brand website provides greater authenticity and trust

Key barriers to using brand.com, particularly evident from non-english markets, is the absence of local language options from product specs to delivery. This contributes to some issues of trust and reliability with brand.com as shoppers are unsure if products are sold/available locally. Longevity in an online space is dependent on connecting with shoppers in a relevant manner.[15]

13 Refer to slide 17 within this report for referenced data point

14 Refer to slide 27 within this report for referenced data point

15 Refer to slide 28 within this report for referenced data point

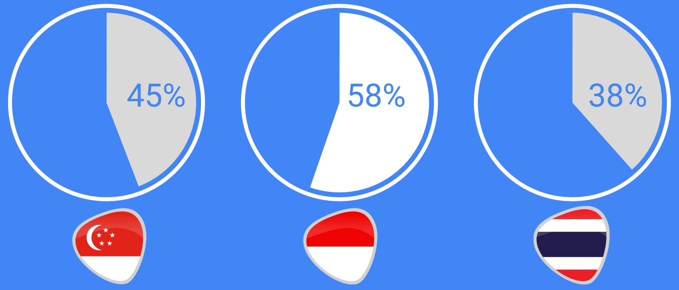
Chapter 3
Marketplace story

Marketplace: Catering to shoppers in an increasingly price cautious world

47%

Shoppers have purchased from Marketplace in the past 6 months*

3-MKT average



> Marketplaces are more 'customer minded' - in terms of the smoothness and ease of transaction. In comparison, purchase process on Brand.com may not be as smooth because it is not specific for selling.
>
> *ID Marketplace shopper*

		Average no. of purchases (vs. brand.com)
Consumer tech	60%	1.6 (vs. 1.5)
Home appliance	56%	1.6 (vs. 1.6)
Beauty	37%	2.1 vs. (1.7)
Apparel	33%	3.0 (vs. 2.3)

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
S6a. Within the past 6 months, where did you purchase the following categories? Please select all that apply
S6c. In the past 6 months, how many times have you made a purchase online in each of these categories?
*Based on usage as a final conversion channel.
Channel conversion by category varies. For consumer tech and home appliance asked amongst 2 channels, beauty & apparel asked amongst 4 conversion channels

Marketplace plays different roles throughout the purchase journey.

Marketplace plays different roles throughout the purchase journey. It is being leveraged as a important touchpoint for shoppers, making it a platform that provides important information across the consumer journey with easy check out experience.

Upper funnel - help shoppers to discover and compare brands

Middle funnel - provide product information and customer reviews

Lower funnel - ease of check-out with saved information (e.g. address, payment)

> **"I start with searching on marketplace to know what are the brands that are available in Jakarta. Then, I will use Google to search for more information about each of these brands."**

ID Marketplace shopper

Touchpoint usage across purchase journey

	Brand.com	Marketplace
Upper Funnel	9%	27%
Middle Funnel	34%	60%
Lower Funnel	31%	47%

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
B2. Think about the very first moment when you decided to buy [Category], please select the first place you visited.
C4. Can you indicate all the things that you have done prior to your last purchase related to [Product]
S6a (S20PIPEIN). Within the past 6 months, where did you purchase the following categories? Please select all that apply for each of the categories.

Consumers can easily transact and finalise purchases with marketplaces.

Facilitation

Marketplace provides the nudges that push shoppers towards checkout e.g. message reminders, displaying stock availability, limited time sale.

“After I made a decision on the product, I actually added to cart but got distracted and did not check out. It was only when the seller messaged me again 3 days later if I wanted the item, then I decided to make the purchase there and then.”

TH marketplace shopper

Convenience

Marketplace has some unique strengths over brand.com with its mobile app and stronger shopping UX features by catering to shopping journeys that are focused on the transaction.

“I saw an ad on [Social Media Platform] that the [Consumer Tech Brand] announced the new model. And at the time, I also happened to get my salary. So I started shopping on [Marketplace] and bought it right away. Everything was done in an hour.”

ID marketplace shopper

…By catering to shoppers’ need for a convenient shopping experience.

Marketplace has unique strength which supports an easy shopping user interface, allowing shoppers to explore & evaluate.

Ease of product search, price check with app

Stronger shopping features such as add to cart, save to wishlist, options to filter results

Ease of checkout with saved information such as address and credit cards

Motivations across the purchase journey

MOTIVATIONS (among buyers)

Upper Funnel		Middle Funnel	
Price deals / promotions	76% ↑	Deals / promotions / discounts	57% ↑
Product reviews	**55%**	**Compare products**	**41% ↑**
General product specs	**42%**	**Everything I want in one place**	**34% ↑**
Product specs via photos	**37% ↓**	Clear product info	**33% ↓**
Product specs via videos	**25% ↓**	Fast delivery	**32% ↑**

↑/↓ Marketplace is significantly higher/lower than Brand.com

> **“I like the filter features on [Marketplace platform]… I am able to filter by price, brand, seller location, seller rating, etc. It is so convenient to shop on Marketplace.”**
>
> *TH Marketplace shopper*

ACTION POINTS: As ‘clear product info’ is significantly lower than brand.com, Marketplace can strengthen its role in upper and middle funnel through providing more detailed product listings, with enhanced visuals/videos.

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
B4. What are the main reasons for using / visiting [RESPONSE FROM B2]? Please select between 3 to 5 answers
C5. What are the main reasons for using touchpoints

The marketplace shopping experience is supported by competitive pricing - attracting the price conscious shopper.

Price-conscious shoppers go to marketplace for the best deal

Marketplace hosts many sellers on its platform, making it easy to compare prices.

It offers competitive pricing and best deals - if shoppers are savvy enough to do the necessary checks (filtering of authentic and trustworthy sellers). Shoppers know how to get and use the platform coupons and look out for cashback tie-ups. Savings are quite significant compared to brand.com.

Loyalty programs also draw shoppers to accumulate their spend on the platform - locking them in for repeat purchases.

> **"There are many sellers of the same product on marketplace. So they have to keep their prices competitive to attract shoppers. Moreover, you can collect coupons for more discounts, wait for flash sales, or look out for those cashback tie-ups with credit cards."**
>
> *SG Marketplace shopper*

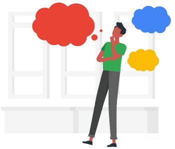
Motivations across the purchase journey

MOTIVATIONS (among buyers)

Lower Funnel	
Price discount	**54%↑**
Flash sales	**29%↑**
Easy navigation	21%
Returns/exchange service	20%
Cashback deals	**20%**

↑/↓ Marketplace is significantly higher/lower than Brand.com

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
D6. What were the main reasons for purchasing this item, [PRODUCT], specifically from [PIPE IN CODE FROM D3]? What are the key reasons for using this website or app?



CONSUMERS' PERCEPTIONS OF TOUCHPOINTS

What are the key opportunities for marketplace?

The spotlight will be on marketplace as a forthcoming player in the online retail space.

Current marketplace usage is higher than brand.com

1.8x Current usage across all categories & markets

How shoppers perceive marketplace...

55% to be influential to their purchase journey

47% and intend to use in the future

1.5x Marketplace plays a unique role in making shoppers aware of price promotions and sales, which is stronger compared to brand.com

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
S6a. Within the past 6 months, where did you purchase the following categories? Please select all that apply for each of the categories.
E6. How much influence or impact did each of these platforms have on each of the key stages of your purchase journey?
E9. Thinking about your future purchases of [Product]. How likely are you to use each of these online channels in each stage of your purchase journey?
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements.

However, buying from marketplace comes with perceived risks.

“I am not sure if the products are first-hand, second-hand, or if it has already been opened. It could break down, or explode. It’s not safe. I feel more confident from brand.com - it would definitely be brand new and in good condition.”

TH marketplace shopper

Product authenticity and condition is the biggest concern

Shoppers are uncertain about product authenticity, e.g. receiving counterfeit products, faulty or damaged products.

To overcome these concerns, shoppers rely on user ratings and reviews, and filter for reliable sellers e.g. Flagship stores.

Overall barriers across the purchase journey

BARRIERS (among non-buyers)

31% Authenticity | **26%** Authenticity

Upper Funnel		Middle Funnel	
Authenticity of products	**31%**	**Authenticity of products**	**26%**
Product videos+photos issues	31%	**Sellers on the platform do not seem trustworthy**	**21%**
Sellers on the platform do not seem trustworthy	**23%**	Delivery issues (cost, no options)	19%
No supporting / additional services available	16%	Product videos+photos issues	19%
Product info was not detailed enough	14%	No supporting / additional services available	16%

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
B5. What are the reasons for not visiting/using [“Official Brand Website” or “marketplace platform”] when you first decided you want to buy the product?
C9. What are the main reasons for not using [PIPE IN “Official Brand Website” OR PIPE IN “marketplace website”] to search or evaluate products?

Brands and Marketplaces can leverage each other's strengths.

Both brands and marketplaces need to offer strong evidence of authentic sellers or genuine products & information to shoppers. As shoppers are seek assurance and authenticity with brands, both platforms can leverage each other's unique strengths.

"My first choice is to buy from brand.com, but when I went into the Brand website, I couldn't find any option to buy and they redirected me to their official Store in [Marketplace]. I only felt assured to buy from [Marketplace] because the link to the shop is provided on the brand website, so it must be coming from the brand itself."

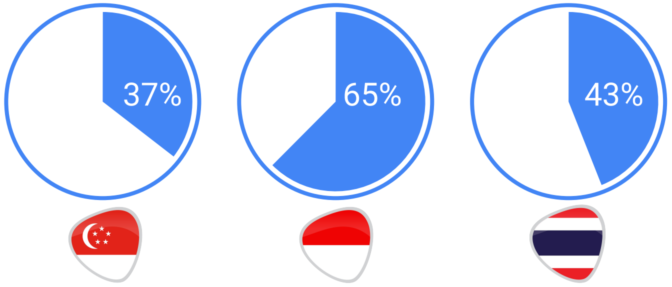
TH Marketplace shopper

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
D11. You mentioned you purchased [Product] from [PIPE IN CODE FROM D3]. Was this via a flagship store from a reseller?

51%

Shoppers recall having purchased from a **brand flagship store** on marketplace in the past 6 months.*

3-MKT average



*Score derived amongst Marketplace buyers

Shoppers want confidence from marketplace in terms of delivery assurance and after sales support.

Provide more assurance around delivery
Consumers notice indefinite delivery dates when the products are shipped from overseas. Lack of choice in courier (some couriers have better reputation and hence, preferred by shoppers) is also a frustration.

Ensure there is after-sales services/ local warranty included
One of the primary concerns is the lack of after-sales service in case of issues, warranty, repairs. Also, if it is an overseas seller, there is the concern of no local warranty.

> **"I won't buy from marketplace as I am not sure if they include warranty or provide any after-sales service like installation or repair, so I rather buy from brand.com."**
>
> *TH Brand.com shopper*

Overall barriers across the purchase journey

BARRIERS (among non-buyers)

16% No supporting services

19% Delivery issues

Upper Funnel

Authenticity of products	31%
Product videos+photos issues	31%
Sellers on the platform do not seem trustworthy	23%
No supporting / additional services available	**16%**
Product info was not detailed enough	14%

Middle Funnel

Authenticity of products	26%
Sellers on the platform do not seem trustworthy	21%
Delivery issues (cost, no options)	**19%**
Product videos+photos issues	19%
No supporting / additional services available	**16%**

ACTION POINTS: Marketplace needs to mitigate risks associated through stronger features that provide assurance and confidence such as verified, authentic, safe-for-delivery, safe-for-payment certifications

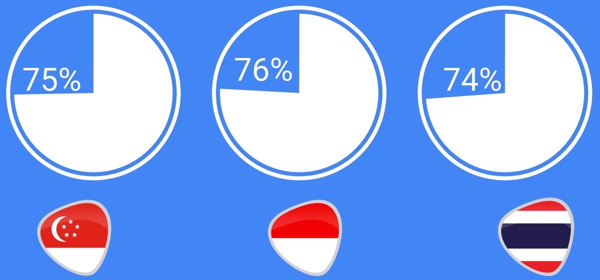
Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
B5. What are the reasons for not visiting/using ["Official Brand Website" or "marketplace platform"] when you first decided you want to buy the product?
C9. What are the main reasons for not using ["Official Brand Website" OR PIPE IN "marketplace website"] to search or evaluate products?

Marketplaces and brands can leverage Search to help shoppers along their pathway journey.

75%

Survey respondents have used Google to search, explore and evaluate products from brands.

3-MKT average



Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
C4. On the next screen, you will see a list of things people can do to prepare themselves for buying [Product]. Can you indicate all the things that you have done prior to your last purchase related to [Product]?.

“I always start with Google - especially if I don’t have any brands in mind. I will search to find the top brands for this category.”

Then after, I will use Google to search for more information and details on the brand and models to compare and make decision.”

ID Marketplace shopper

“I use Google to search for more info about the model. Results from many websites came out [various Marketplace platforms]. At one glance, I can see which are offering the lower prices, so I went to click into each result to check the details.”

TH Marketplace shopper

“Usually on marketplace, the product info is very minimal, or maybe even incorrect as there are typos. So I will search on Google to get more details to compare across the brands or models to make my decision on the final product to buy.”

SG Marketplace shopper

Marketplaces can leverage Search and YouTube to deliver on convenience with price comparisons and direct links to the platforms.

Google

Facilitation

Search provides quick answers and price comparisons to facilitate the decision making.

> **"I use Google Search to find the cheapest price… From there I don't have to go into two different marketplace platforms separately."**

SG Marketplace shopper

Convenience

Google shopping provides shortcuts to compare across different marketplaces.

> **"Sometimes, the brand/ model I want is not available, so I use Google to find where I can buy it from."**

TH Marketplace shopper

YouTube

Facilitation

YouTube provides quick and easy to understand answers (in video format) to questions around product specs and usage to help shoppers make decision quicker.

> **"My preference is just to watch YouTube… At one glance, I can understand the specs better, and the features like the 'touch bar' easily."**

SG Brand.com shopper

Total sample size n=3600, SG = 1200, IN n=1200, TH n=1200
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements.

MARKETPLACE KEY TAKEAWAYS

Marketplace plays different roles throughout the purchase journey

Shoppers are able to explore, search and compare brands/products and transact on marketplace. Shoppers are leveraging it as a touchpoint which allows shoppers choose the right products.[16]

Marketplace offers a convenient shopping experience

Shoppers are attracted to marketplace's advantage as a retail platform to explore a wide variety of brands and product categories. The mobile apps supports a seamless shopping user interface that is focused on transactions.[17]

Price is the key drawcard for marketplace, but lowest price does not guarantee authenticity

Marketplace is able to deliver on price, offering attractive concessions (e.g. cashback, flash sales etc.). However, this raises concern over authenticity of sellers and products on marketplace. Shoppers are acutely conscientious about this and purchase with a heightened sense of risk.[18]

Deliver assurance and confidence with verified, authentic, safe-for-delivery, safe-for-payment certifications

Mitigate risks associated on marketplace by enhancing its features of 'Official store', 'Verified seller', as well as stronger features that support the after-sales service around returns/ refunds/ exchanges.[19]

Augment the marketplace listings with distinctive advantage, price savings info, and mention product details and info on the side

Make it easy to compare products by having detailed product listings on marketplace with visuals/ videos. Provide better quality reviews on product use and experience.[20]

16 Refer to slide 33 within this report for referenced data point

17 Refer to slide 35 within this report for referenced data point

18 Refer to slide 39 within this report for referenced data point

19 Refer to slide 41 within this report for referenced data point

20 Refer to slide 41 within this report for referenced data point

Chapter 4
Investigating Category Differences

Apparel
Main takeaways

Usage incidence across touchpoints

Both brand.com and marketplace are important in the mid funnel - especially for marketplaces.

Marketplace is typically the first touchpoint used in the journey (28%).

Brand.com commands a Higher claimed spend

Brand.com has the unique ability to command a higher claimed spend (1.2x 3-mkt average and 1.8x in Indonesia).

Motivations to use touchpoint

Brand.com & marketplace deliver the same benefits to shoppers at the upper & mid funnel (price, product specs, photos, reviews).

However lower funnel motivations differ: brand.com performs on genuine products and delivery.

Marketplace performs on ease of use and flash sales.

Market nuances for brand.com

Opportunity areas for Singapore: to build on credible reviews & exclusive deals.

Opportunity areas for Indonesia: Secured delivery, filter, set range, sort.

Opportunity areas for Thailand: Side-by-side comparison, exclusive deals.

Both brand.com and marketplace are important in the mid funnel - especially for marketplaces.

3-MKT AVERAGE: USAGE INCIDENCE OF TOUCHPOINTS

	Brand.com	Marketplace
Upper Funnel	10%	28%
Middle Funnel	33%	63%
Lower Funnel	21%	33%

Total sample size n=600, SG = 200, IN n=200, TH n=200
B2. Think about the very first moment when you decided to buy [Category], please select the first place you visited.
C4. Can you indicate all the things that you have done prior to your last purchase related to [Product]
S6a (S20PIPEIN). Within the past 6 months, where did you purchase the following categories? Please select all that apply for each of the categories.

Brand.com is able to command the highest claimed spend from apparel shoppers.

	Average across all markets	SG	ID	TH
Brand.com	$95 USD	$68 USD	**$118 USD**	$99 USD
Marketplace	$79 USD	$83 USD	$63 USD	$91 USD
Brand.com users' claimed spend	**1.2x** > than MarketPlace		**1.8x** > than MarketPlace	**1.0x** > than MarketPlace

Total sample size n=600, SG = 200, IN n=200, TH n=200
Spend S10. When you purchased item(s) from each of the categories, how much did you spend? For each purchase, please indicate how much money you spent.

Brand.com & marketplace deliver the same benefits, however lower funnel experience is different between brand.com & marketplace.

TOP MOTIVATIONS ACROSS BRAND.COM & MARKETPLACE

	Upper Funnel	Middle Funnel	Lower Funnel
	COMMON MOTIVATIONS	COMMON MOTIVATIONS	DIFFERENT MOTIVATIONS
Brand.com	Price/Deals- 62% ↓ Reviews- 51% Photos- 46%	Price/Deals - 60% ↑ Price/Deals- 50% Ease-of-use 37%	Genuine- 30% Price/Deals- 51% Delivery- 25% ↑
Marketplace	Price/Deals- 84% ↑ Reviews- 52% Product Specs- 48%	Price/Deals- 56% Product Specs- 35% ↓ Ease-of-use- 34%	Price/Deals- 53% Ease-of-use- 35% ↑ Flash sales- 32% ↑

↑/↓ Brand.com is significantly higher/lower than Marketplace (MP)

Total sample size n=600, SG = 200, IN n=200, TH n=200
B4. What are the main reasons for using / visiting [RESPONSE FROM B2]?
C5. What are the main reasons for using touchpoints
D6. What were the main reasons for purchasing this item, [PRODUCT], specifically from [PIPE IN CODE FROM D3]? What are the key reasons for using this website or app?

Apparel consumers have a high judgement of brand.com and less likely to compromise on key fundamentals such as product specs, cost and delivery.

TOP 5 **BARRIERS** FOR BRAND.COM

Upper Funnel		Middle Funnel		Lower Funnel	
Product not listed on brand site	25%	Cannot compare brands	26%	Product info not detailed enough	31%
Unsuitable for inspiration	21%	Too expensive	20%	Product info not reliable	27%
Too expensive	20%	Unsuitable for inspiration	17%	Website not trustworthy	27%
Brand website in foreign language	15%	Never thought of it	16%	Overseas website, do not trust	25%
No user reviews	14%	Brand site has no reviews	16%	Expensive shipping	24%

Total sample size n=600, SG = 200, IN n=200, TH n=200
B5. What are the reasons for not visiting/using [“Official Brand Website” or “marketplace platform”] when you first decided you want to buy the product?
C9. What are the main reasons for not using [PIPE IN “Official Brand Website” OR PIPE IN “marketplace website”] to search or evaluate products?
E2. What are the reasons why you did not purchase from [“Official Brand Website” OR “marketplace platform”] ... during this purchase occasion

Apparel shoppers perceive authenticity as a fundamental barrier for marketplace.

TOP 5 **BARRIERS** FOR MARKETPLACE

Upper Funnel

Unsure of product authenticity	29%
Looking for inspiration, Marketplace not suitable	24%
Untrustworthy sellers	22%
Niche product	18%
Product info not helpful	18%
Product photos not detailed enough	18%

Middle Funnel

Unsure of product authenticity	25%
Untrustworthy sellers	21%
Never thought of it	20%
Looking for inspiration, Marketplace not suitable for	18%
No supporting services	16%

Lower Funnel

Expensive shipping cost	23%
Marketplace redirected me elsewhere	20%
Product info unclear	19%
Product info not reliable	17%
No promotions	17%
Long delivery time	16%
Untrustworthy sellers	16%

Total sample size n=600, SG = 200, IN n=200, TH n=200
B5. What are the reasons for not visiting/using ["Official Brand Website" or "marketplace platform"] OR PIPE IN IF CODE 14 "Official Brand Website"] when you first decided you want to buy the product?
C9. What are the main reasons for not using [PIPE IN "Official Brand Website" OR PIPE IN "marketplace website"] to search or evaluate products?
E2. What are the reasons why you did not purchase from ["Official Brand Website" OR "marketplace platform"] ... during this purchase occasion

Market nuances: key delivery points for brand.com

	Continue to reinforce (strong impact future usage + **strong** perf.)	Opportunity areas (strong future usage impact + average perf.)	Improvement areas (strong impact + weak perf.)
	Genuine product Trustworthy specs Secured delivery Long term warranty Express delivery	Clear product pic/vid Exclusive deals Credible reviews	Filter, set range, sort
	Genuine product Trustworthy specs Express delivery	Clear product pic/vid Secured delivery Filter, set range, sort	Express delivery Credible reviews
	Genuine product Secured delivery Express delivery	Clear Product pic/vid Side-by-side comparison Exclusive deals	Filter, set range, sort

Total sample size n=600, SG = 200, IN n=200, TH n=200
E0. Which of these features will attract you to use brand.com when you next want to purchase the category?
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements

Beauty
Main takeaways

Usage incidence across touchpoints

Beauty brands need to be visible at awareness and consideration stages to capture value from shoppers.

Marketplace is typically the first touchpoint used in the journey (28%).

Brand.com commands a higher claimed spend

Brand.com has the unique ability to command a higher claimed spend (1.3x 3-mkt average).

Motivations to use touchpoint

Beauty shoppers appreciate brand websites & marketplaces that offer them an 'easy-to-use' experience.

Rewards programs also a lower funnel benefit for brand.com.

Market nuances for brand.com

Opportunity areas for Singapore: exclusive deals, easy to find info, reward points, express delivery.

Opportunity areas for Indonesia: Discovery of new products, secure delivery.

Opportunity areas for Thailand: Secure & express delivery, reward points, exclusive deals.

Total sample size n=600, SG = 200, IN n=200, TH n=200

Beauty brands can improve awareness of official websites at upper funnel stage. Marketplaces are important in the mid funnel in beauty category.

3-MKT AVERAGE: USAGE INCIDENCE OF TOUCHPOINTS

	Brand.com	Marketplace
Upper Funnel	2%	28%
Middle Funnel	30%	58%
Lower Funnel	20%	37%

Total sample size n=600, SG = 200, IN n=200, TH n=200
B2. Think about the very first moment when you decided to buy [Category], please select the first place you visited.
C4. Can you indicate all the things that you have done prior to your last purchase related to [Product]
S6a (S20PIPEIN). Within the past 6 months, where did you purchase the following categories? Please select all that apply for each of the categories.

Brand.com is able to command a higher claimed spend from beauty shoppers - 30% more than marketplaces.

	Average across all categories	SG	ID	TH
Brand.com	$98 USD	$83 USD	$84 USD	$122 USD
Marketplace	$75 USD	$61 USD	$73 USD	$102 USD
Brand.com users' claimed spend	1.3x > than MarketPlace	1.3x > than MarketPlace	1.1x > than MarketPlace	1.2x > than MarketPlace

Total sample size n=600, SG = 200, IN n=200, TH n=200
Spend S10.When you purchased item(s) from each of the categories, how much did you spend? For each purchase, please indicate how much money you spent.

Beauty shoppers appreciate brand websites & marketplaces that offer them an easy-to-use experience. Rewards programs also a lower funnel benefit for brand.com.

TOP MOTIVATIONS ACROSS BRAND.COM & MARKETPLACE

	Upper Funnel	Middle Funnel	Lower Funnel
	COMMON MOTIVATIONS	COMMON MOTIVATIONS	DIFFERENT MOTIVATIONS
Brand.com	Price/Deals- 65% Reviews- 58% Product Specs- 45%	Product Specs- 61% ↑ Price/Deals- 37% ↓ Ease-of-use- 25%	Price/Deals- 42% ↓ Genuine- 26% Membership rewards program - 26%
Marketplace	Price/Deals- 69% Reviews- 66% Product Specs- 36% ↓	Price/Deals- 61% ↑ All-in-one platform- 34% ↑ Product Specs- 31% ↓	Price/Deals- 57% ↑ Ease-of-use- 34% ↑ Flash sales- 32% ↑

↑/↓ Brand.com is significantly higher/lower than Marketplace (MP)

Total sample size n=600, SG = 200, IN n=200, TH n=200
B4. What are the main reasons for using / visiting [RESPONSE FROM B2]?
C5. What are the main reasons for using touchpoints
D6. What were the main reasons for purchasing this item, [PRODUCT], specifically from [PIPE IN CODE FROM D3]? What are the key reasons for using this website or app?

Market nuances: key delivery points for brand.com

	Continue to reinforce (strong impact future usage + **strong** perf.)	Opportunity areas (strong future usage impact + average perf.)	Improvement areas (strong impact + weak perf.)
	Genuine product Trustworthy specs Secured delivery	Exclusive deals Easy to find info Membership Reward points Express delivery	Credible reviews
	Genuine product Priority queue for latest product	Discover new products Secure delivery	Tailored curation of products Easy to find info Search function
	Genuine product Trustworthy specs Long term warranty	Secure delivery Membership Reward points Express delivery Exclusive deals	Credible reviews

Total sample size n=600, SG = 200, IN n=200, TH n=200
E0. Which of these features will attract you to use brand.com when you next want to purchase the category?
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements

Home appliance
Main takeaways

Pandemic has shifted online shopping behaviour

55% of brand.com home appliance shoppers are first time online shoppers. Brands need to be more visible online more than ever.

Reasons for online purchases for home appliances are driven by quality, value for money and authenticity.

Usage incidence across touchpoints

Usage of brand.com is lower compared to marketplace. Marketplace is typically the first touchpoint used in the journey (31%).

Brand.com as a higher future intention to use rating against marketplace in home appliance category (1.5x stronger future intention to use)

Barriers against using touchpoints

Given that product quality is a predominant concern in this category, the pain point for brand.com lies with reliability & purchase options - especially for Indonesia and Thailand.

47% of Thai home appliance shoppers have concerns with brand website reliability. Brands need to provide a platform where shoppers can interact and trust will be pivotal.

Market nuances for brand.com

Opportunity areas for Singapore: Exclusive deals, express delivery, ability to sort & filter, credible reviews & easy to find info.

Opportunity areas for Indonesia: exclusive deal, secure delivery, trustworthy specs,
ability to sort & filter, credible reviews.

Opportunity areas for Thailand: exclusive deals, secure & express delivery, trustworthy specs, long term warranty.

Total sample size n=600, SG = 200, IN n=200, TH n=200

Pandemic has shifted home appliance shopping behaviour. Brands need to be visible online more than ever.

55% of brand.com home appliance shoppers are first time online shoppers.

Reasons for online purchase	COVID-19 impact (physical stores closed & in lockdown)	41%	
	Cheaper online than in physical stores	36%	
Key category considerations for online purchase	Quality of the product	63%	
	Value for money	54%	
	Authenticity of product / genuine product	44%	
First time purchasing online	3 mkt-average	51%	
	Brand.com users	**55%**	
	Marketplace users	48%	

> “This is my first time buying home appliances online. Normally, I would buy it from the stores but because we were on lockdown, and I needed it urgently, I bought it online.”

SG Brand.com shopper

Total sample size n=600, SG = 200, IN n=200, TH n=200
D5. Why did you purchase [Product] online? Why did you purchase this item specifically online and not in a physical store?
D7a. Thinking about when you purchased [Product]. What were the key factors for buying this specific product? Select all that apply
D5a. Is this your first time purchasing [PIPE IN SUB CATEGORY] online?

Home appliance brands can improve awareness of official websites at upper funnel stage. Both brand.com and marketplaces are important in the mid funnel.

3-MKT AVERAGE: USAGE INCIDENCE OF TOUCHPOINTS

	Brand.com	Marketplace
Upper Funnel	2%	31%
Middle Funnel	32%	57%
Lower Funnel	44%	56%
MOTIVATIONS (among buyers)	Price/Deals- 38% 24hr support 23% ↑ Warranty 25% ↑ Membership rewards- 23%	Price/Deals- 51% ↑ Flash sales- 25% ↑ Ease-of-use- 24% ↑ Refund 24%

"For big ticket items like home appliances, I use many different channels to get information and compare brands, models and prices… I want to be sure that I have sufficient information to make the right choice."

SG Marketplace shopper

"I check YouTube reviews to see - is the feature easy to use, is there any defect, is there anything undetected until you are using it, maybe it will shake strongly/trembling during wash… such info won't be on brand.com, we only know it when we watch user video reviews."

SG Marketplace shopper

Total sample size n=600, SG = 200, IN n=200, TH n=200
B2. Think about the very first moment when you decided to buy [Category], please select the first place you visited.
C4. Can you indicate all the things that you have done prior to your last purchase related to [Product]
S6a (S20PIPEIN). Within the past 6 months, where did you purchase the following categories? Please select all that apply for each of the categories.

Brand.com has a role to play in home appliance category.

1.5x

Brand.com as a higher future intention to use rating against marketplace in home appliance category.

SG	ID	TH
1.5x	Not significant	1.2x

> **"For big ticket items like home appliances, I will definitely visit brand.com website to check the specifications and details of the product... on marketplace, sometimes they provide all the details, or the visuals uploaded are not as clear so I will still go to brand.com to check product information."**
>
> *SG Marketplace shopper*

Total sample size n=600, SG = 200, IN n=200, TH n=200
E9. Thinking about your future purchases of [Product], How likely are you to use each of these online channels in each stage of your purchase journey?

Given that product quality is a predominant concern in this category, the pain point for brand.com lies with reliability & purchase options - especially for ID & TH.

Barriers to use brand.com

	3-MKT AVERAGE				SMALL APPLIANCE	LARGE APPLIANCE
Brand website not reliable	26%	9%	28%	47%	25%	26%
No option to make purchase	21%	15%	30%	21%	21%	23%
Do not trust overseas website	21%	12%	26%	25%	21%	21%

"I went to brand.com first as for such big ticket items like home appliance, I prefer to buy direct from manufacturer.

But, when I went to their website, there was no option to buy. Instead, they redirected me to their flagship store in marketplace so I couldn't buy it from brand.com."

TH Marketplace shopper

Total sample size n=600, SG = 200, IN n=200, TH n=200
B5. What are the reasons for not visiting/using ["Official Brand Website" or "marketplace platform"] when you first decided you want to buy the product?
C9. What are the main reasons for not using [PIPE IN "Official Brand Website" OR PIPE IN "marketplace website"] to search or evaluate products?
E2. What are the reasons why you did not purchase from ["Official Brand Website" OR "marketplace platform"] ... during this purchase occasion

Market nuances: key delivery points for brand.com

Continue to reinforce (strong impact future usage + **strong** perf.)	Opportunity areas (strong future usage impact + average perf.)	Improvement areas (strong impact + weak perf.)
Genuine product Trustworthy specs Secure delivery Long term warranty	Exclusive deals Express delivery Ability to sort & filter Credible reviews Easy to find info	
Genuine product Long term warranty	Exclusive deals Secure delivery Trustworthy specs Ability to sort & filter Credible reviews	Express delivery
Genuine product	Exclusive deals Secure & express delivery Trustworthy specs Long Term warranty	

Total sample size n=600, SG = 200, IN n=200, TH n=200
E0. Which of these features will attract you to use brand.com when you next want to purchase the category?
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements

Consumer technology
Main takeaways

Pandemic has shifted online shopping behaviour

44% of brand.com consumer technology shoppers are first time online shoppers. Brands need to be more visible online more than ever.

Reasons for online purchases for consumer technology appliances are driven by quality, authenticity and value for money.

Opportunity is ripe for brand.com and marketplaces

Opportunities for brand.com to grow in ID & TH. Further work required in SG due to market maturity and consumers' wider repertoire of channels which compete for attention.

Consumer tech brands need to be visible at key stages of the purchase journey.

Motivations for using touchpoints

Consumer tech shoppers appreciate brand websites for warranty & genuine products.

Marketplaces offer shoppers an easy to use online retail experience.

Market nuances for brand.com

Opportunity areas for Singapore: exclusive deals

Opportunity areas for Indonesia: secure & express delivery, clear product videos/photos

Opportunity areas for Thailand: side by side comparison, clear product photos/videos, exclusive deals, express delivery

Pandemic has shifted consumer tech shopping behaviour. Brands need to be more visible online more than ever.

44% of brand.com consumer tech shoppers are first time online shoppers.

Reasons for online purchase	COVID-19 impact (physical stores closed & in lockdown)	43%
	Cheaper online than in physical stores	42%
Key category considerations for online purchase	Quality of the product	66%
	Authenticity of product / genuine product	55%
	Value for money	49%
First time purchasing online	3 mkt-average	42%
	Brand.com users	**44%**
	Marketplace users	40%

"If it was possible, I would have gone down to the store to get a look and feel of the product. Since the shops are closed during COVID-19, I used YouTube to watch the video reviews, and one can also get a sense of the size, and a sense of the product from the videos."

- ID Marketplace shopper.

Total sample size n=1800, SG = 600, IN n=600, TH n=600
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements.
E9. Thinking about your future purchases of [Product], How likely are you to use each of these online channels in each stage of your purchase journey?

Consumer tech brands can improve awareness of official websites at upper funnel stage. Both brand.com and marketplaces are important in the mid funnel.

3-MKT AVERAGE: USAGE INCIDENCE OF TOUCHPOINTS

	Brand.com	Marketplace
Upper Funnel	10%	25%
Middle Funnel	41%	61%
Lower Funnel	40%	60%

"When I read a certain spec that I don't understand on Marketplace, I use Google to search "AMD Radeon vs Core i3" to compare the differences to decide which brand of laptop to buy"

ID Marketplace shopper

Total sample size n=1800, SG = 600, IN n=600, TH n=600
B2. Think about the very first moment when you decided to buy [Category], please select the first place you visited.
C4. Can you indicate all the things that you have done prior to your last purchase related to [Product]
S6a (S20PIPEIN). Within the past 6 months, where did you purchase the following categories? Please select all that apply for each of the categories.

Consumer tech shoppers appreciate brand websites for warranty & genuine products. Marketplaces offer shoppers an easy to use online retail experience.

TOP MOTIVATIONS ACROSS BRAND.COM & MARKETPLACE

	Upper Funnel	Middle Funnel	Lower Funnel
	COMMON MOTIVATIONS	COMMON MOTIVATIONS	DIFFERENT MOTIVATIONS
Brand.com	Price/Deals- 73% Reviews- 66% Product Specs- 45%	Product Specs- 63% ↑ Price/Deals- 36% ↓ Ease-of-use- 33% ↑	Price/Deals- 46% ↓ Warranty- 32% ↑ Genuine product- 30% ↑
Marketplace	Price/Deals- 76% Reviews- 63% Product Specs- 42% ↓	Price/Deals- 62% ↑ Product Specs- 35% ↓ Lowest price 33% Everything in 1 place 33%	Price/Deals- 54% ↑ Ease-of-use- 27% ↑ Everything in 1 place 33%

↑/↓ Brand.com is significantly higher/lower than Marketplace (MP)

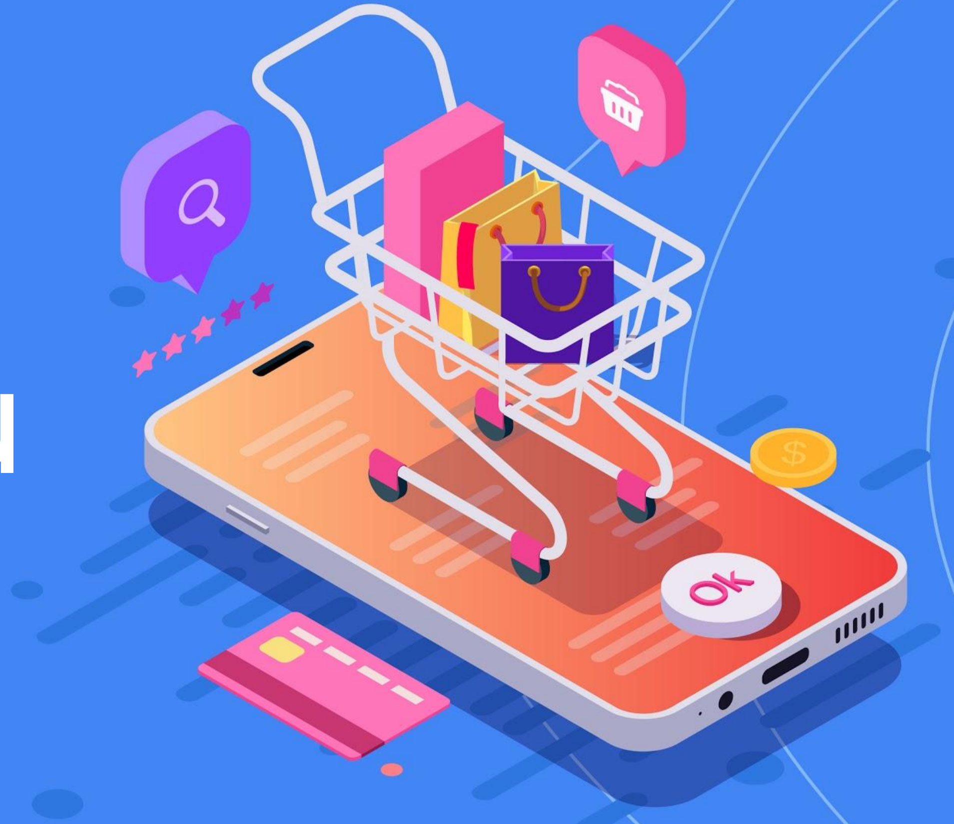
Total sample size n=1800, SG = 600, IN n=600, TH n=600
B4. What are the main reasons for using / visiting [RESPONSE FROM B2]?
C5. What are the main reasons for using touchpoints
D6. What were the main reasons for purchasing this item, [PRODUCT], specifically from [PIPE IN CODE FROM D3]? What are the key reasons for using this website or app?

Market nuances: key delivery points for brand.com

Continue to reinforce (strong impact future usage + **strong** perf.)	Opportunity areas (strong future usage impact + average perf.)	Improvement areas (strong impact + weak perf.)
Genuine product Trustworthy specs Secure & express delivery Long term warranty	Exclusive deals	Credible reviews
Genuine product Trustworthy specs Long term warranty	Secure & express delivery Clear product pic/vid	Ability to filter & sort Credible reviews
Genuine product Trustworthy specs Secure delivery Long term warranty	Side by Side comparison Clear product pic/vid Exclusive deals Express delivery	

Total sample size n=600, SG = 200, IN n=200, TH n=200
E0. Which of these features will attract you to use brand.com when you next want to purchase the category?
E1. Thinking about the activities on the platform that played a role on your purchase journey, please select which platform fits each of the statements. Please select which platform contributed to your overall purchase journey on each of the statements

Thank You



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