

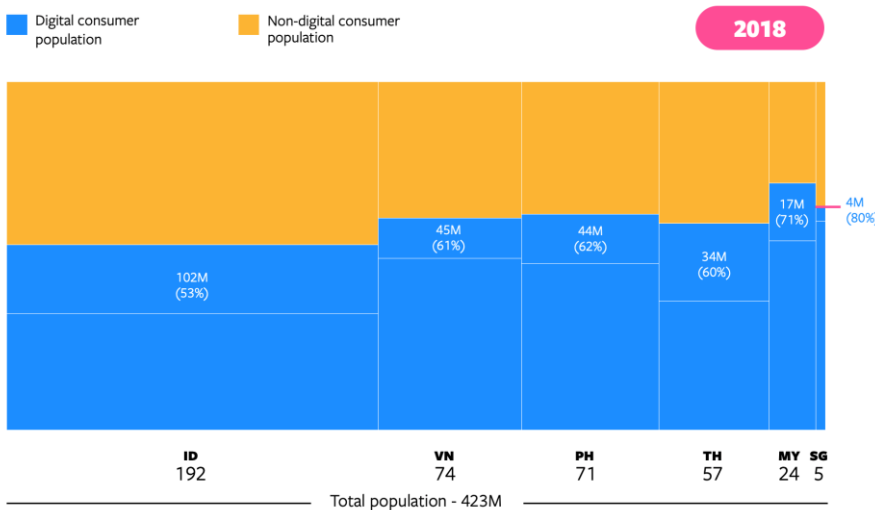
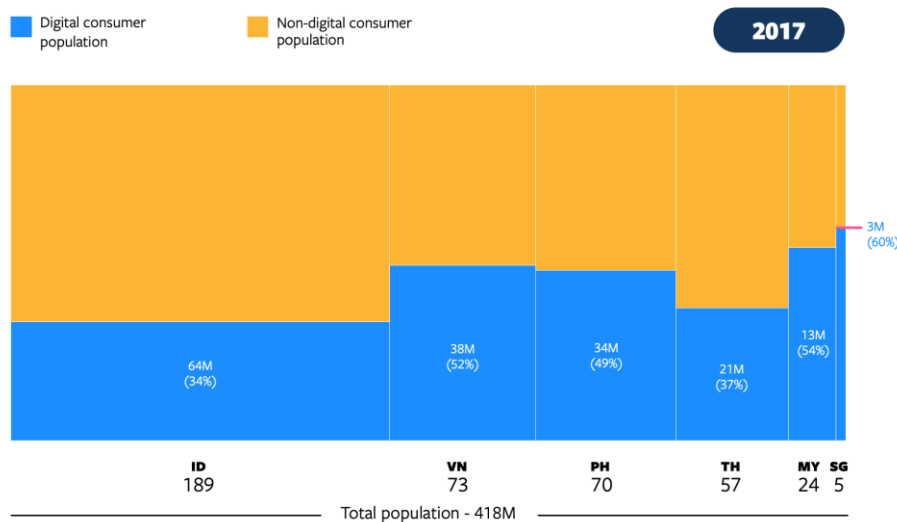
# Online spend in Southeast Asia to outpace the growth of digital consumers by a factor of 3: Facebook and Bain study

New study highlights 'discovery' as a key driver of growth for businesses looking to succeed in the world's fastest-growing digital economy

## APPENDIX ONLY

Visual references for data points:

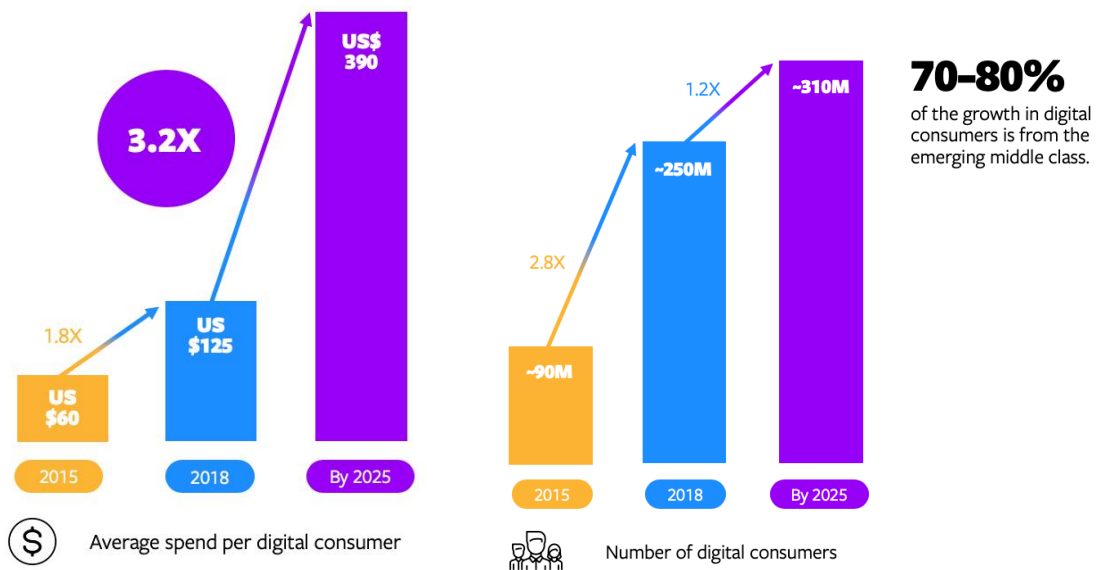
### 1. Growth in digital consumers (2017 vs 2018)



Note: Digital consumers are those who purchased at least one of the categories in the past year: Consumer electronics and accessories; household appliances and furnishings; clothing, footwear and accessories; personal care and beauty; toys and baby care; groceries and food delivery; airline tickets and accommodation; and gaming apps and music

Source: Estimates from: "Passport: Economies and Consumers Annual Data" by Euromonitor International, Jul 2018; "Forrester Analytics: Online Retail Forecast, 2018 to 2023 (Southeast Asia)", by Forrester, Dec 2018; "Digital 2019" by Hootsuite, Jan 2019; "Southeast Asia Digital Consumer Survey" by Bain & Company, June 2015; "Southeast Asia Digital Consumer Survey" by Bain & Company, Jan 2017; "Riding the Digital Wave: Capturing Southeast Asia's Digital Consumer in the Discovery Generation" by Bain & Company (Facebook-commissioned survey of 12,965 respondents from ID, MY, PH, SG, TH, VN), Jun 2019.

2. Growth in online spend vs number of digital consumers



Source: Estimates from: "Economies and Consumers Annual Data" by Euromonitor International, Jul 2018; "Forrester Analytics: Online Retail Forecast, 2018 to 2023 (Southeast Asia)", by Forrester, Dec 2018; "Digital 2019" by Hootsuite, Jan 2019; "Southeast Asia Digital Consumer Survey" by Bain & Company, June 2015; "Southeast Asia Digital Consumer Survey" by Bain & Company, Jan 2017; "Riding the Digital Wave: Capturing Southeast Asia's Digital Consumer in the Discovery Generation" by Bain & Company (Facebook-commissioned survey of 12,965 respondents from ID, MY, PH, SG, TH, VN), Jun 2019.

3. The discovery generation in Southeast Asia and their behaviour

## WHY ARE THEY CALLED THE DISCOVERY GENERATION?

Because they are driven by discovery

**67%**  
of shoppers don't exactly know what they want to buy when they shop online

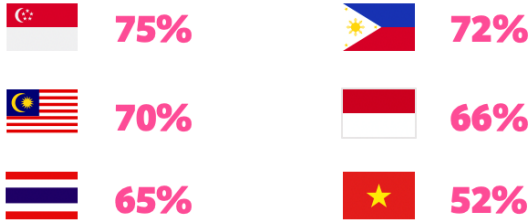
**50%**  
of consumers are learning about new products and brands via discovery platforms

Source: "Riding the Digital Wave: Capturing Southeast Asia's Digital Consumer in the Discovery Generation" by Bain & Company (Facebook-commissioned survey of 12,965 respondents from ID, MY, PH, SG, TH, VN), Jun 2019

4. Digital consumers are shopping across platforms

% of surveyed respondents who said

I will buy from multiple brands / I am open to other brands



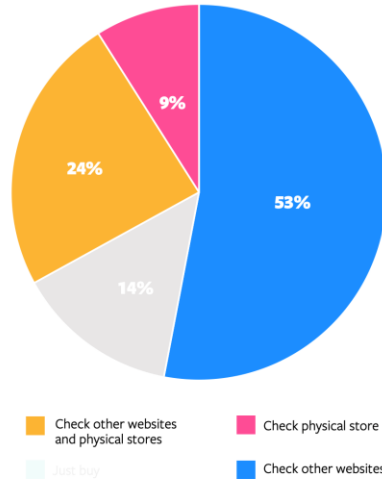
Source: "Riding the Digital Wave: Capturing Southeast Asia's Digital Consumer in the Discovery Generation" by Bain & Company (Facebook-commissioned survey of 12,965 respondents from ID, MY, PH, SG, TH, VN), Jun 2019

**ONLINE/OFFLINE JOURNEY MATTERS**

It's all about "comparison shopping"

**86%**

of shoppers compare products both online (e.g. check other websites, etc.) and/or offline before making a purchase



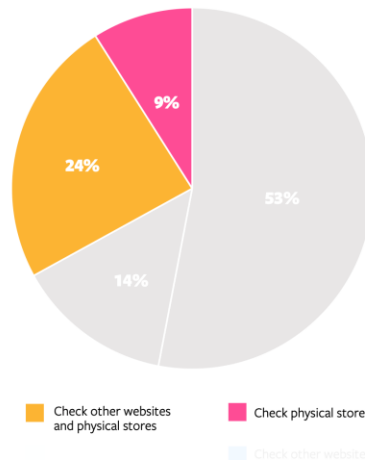
Source: "Riding the Digital Wave: Capturing Southeast Asia's Digital Consumer in the Discovery Generation" by Bain & Company (Facebook-commissioned survey of 12,965 respondents from ID, MY, PH, SG, TH, VN), Jun 2019

**ONLINE/OFFLINE JOURNEY MATTERS**

It's all about "comparison shopping"

**33%**

of shoppers check physical stores before making a purchase



Source: "Riding the Digital Wave: Capturing Southeast Asia's Digital Consumer in the Discovery Generation" by Bain & Company (Facebook-commissioned survey of 12,965 respondents from ID, MY, PH, SG, TH, VN), Jun 2019

5. There is immense potential to build brand loyalty and growth in Southeast Asia

**Relative market share**

RMS refers to the leader's market share vs. the second largest player



Source: Bain & Company analysis based on proprietary e-commerce market model