



# *Making the Most of the e-Commerce Boom in Malaysia*

23 August 2017



# Understanding Digital Consumers in ASEAN



## The ecosystem is reaching an inflection point



- Connectivity is already on a par with China's
- 150 million consumers have already gone digital; high levels of online product searches and engagement
- Online purchases are nascent, but they are at a tipping point in many categories

## Consumer behaviors are shifting and unique



- Mobile first
- Online searching and videos are critical
- Not a price war: Choice and convenience matter
- Fragmented buying with unique "social commerce" behavior
- Advocacy is moving to online platforms

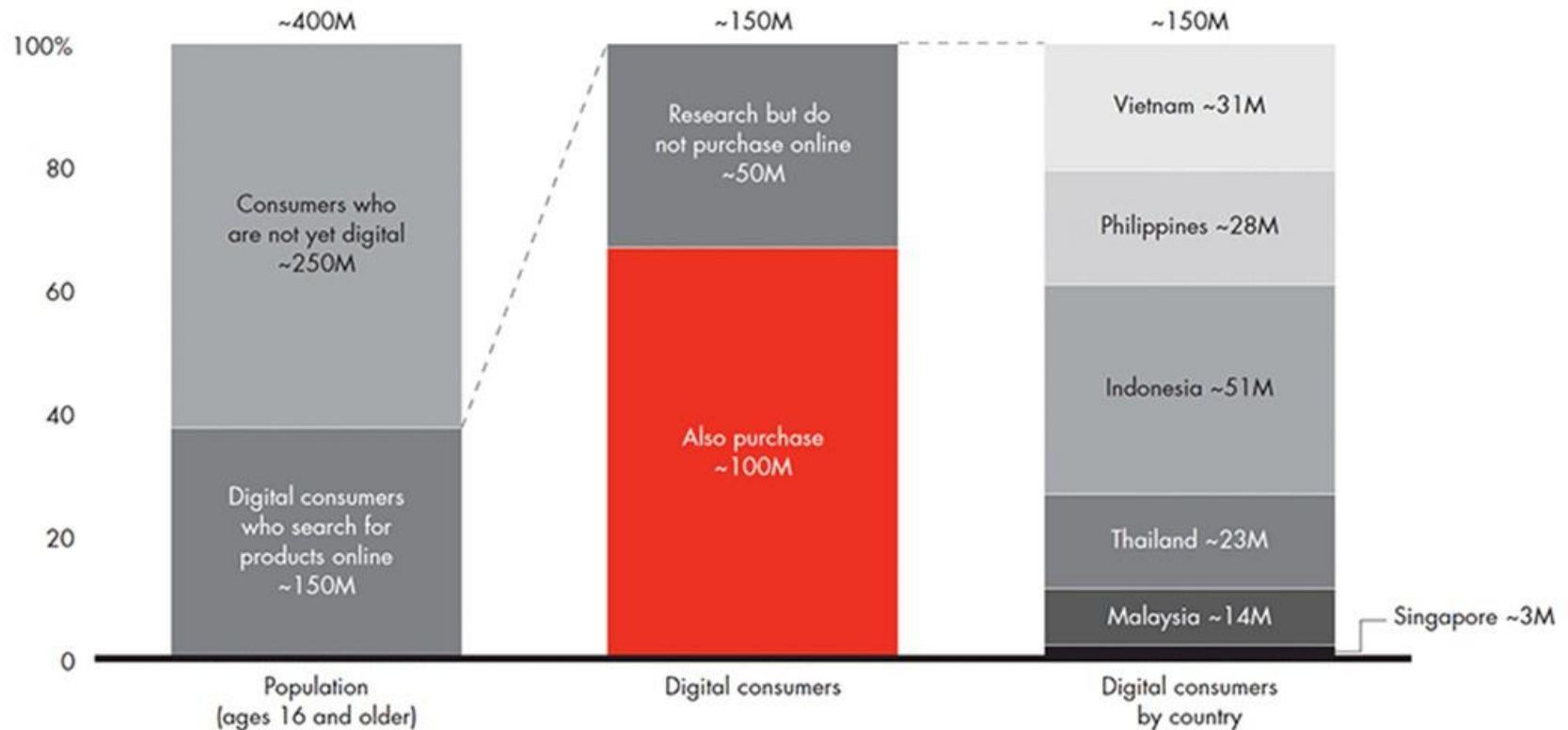
## Market rationality will return, but the question is, when



- Battlefields with high stakes across countries
- Emerging winners are starting to pull away
- Players need to define their engagement models by managing complexity and making bets on the future

Source: Bain & Company

# Of the 150 million digital consumers in Southeast Asia, two-thirds already shop online

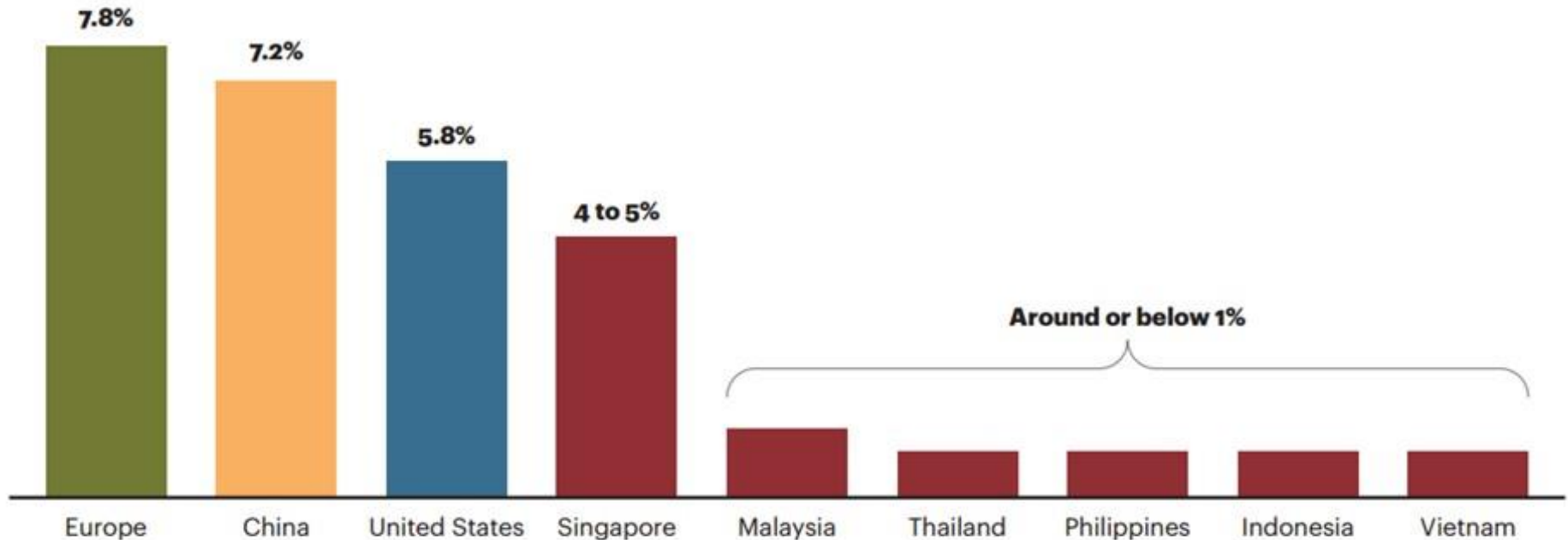


Notes: We define digital consumers as those who are 16 years old or older and who researched products or services online in at least two categories; we define "also purchase online" as digital consumers who purchased products or services online in at least two categories  
 Sources: Bain Southeast Asia Digital Consumer Survey, November 2015 (n=6,278); Bain analysis; Euromonitor

# In five ASEAN countries, e-commerce represents one percent or less of total retail sales

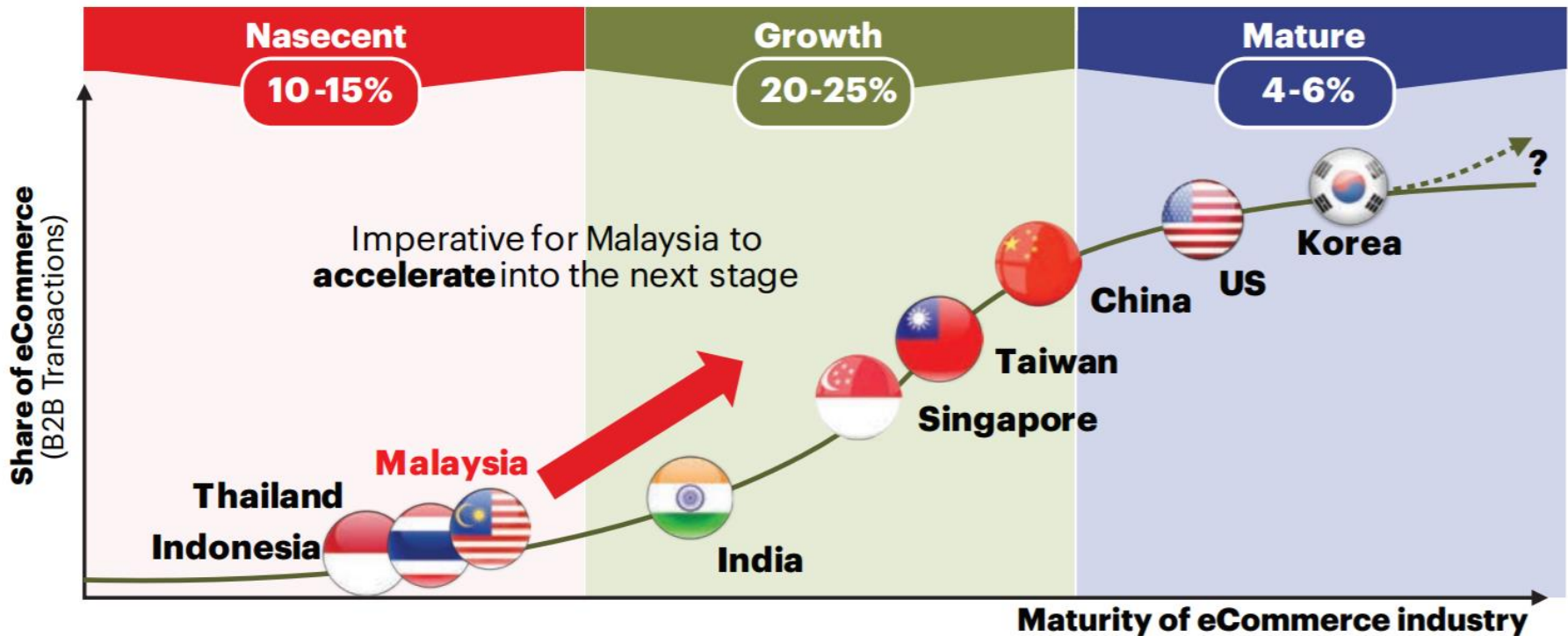


**Percent of retail sales made online**  
(2014, % of total retail sales)



Sources: Frost & Sullivan; A.T. Kearney analysis

# Malaysia Is At a Critical Crossroad for the Digital Economy



XX Typical growth rate in respective phases

Source: National eCommerce Strategic Roadmap

# Companies Act 2016 Overview e-Learning Course



- Module 1 - Introduction to the Companies Act 2016
- Module 2 - Directors, Officers and Shareholders
- Module 3 - Provisions affecting Company Secretaries
- Module 4 - Provisions affecting Auditors
- Module 5 - Meetings and decision making
- Module 6 - Shares, Capital, Audit and Financial Reporting
- Module 7 - Corporate Insolvency Framework
- Module 8 - Other Compliance Requirements



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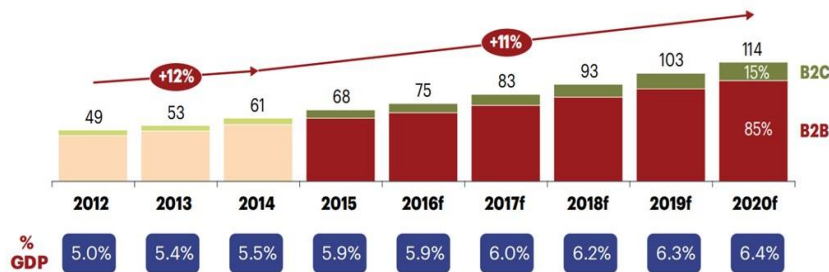
Duration – 8 Hours

Access – 3 months

# The Digital Economy Is Growing, But the Potential Is Even Larger

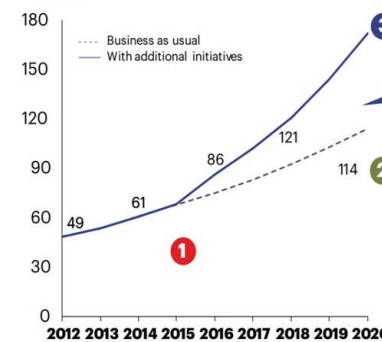


eCommerce contribution to GDP (RM billion)



Source: National eCommerce Strategic Roadmap

RM billion

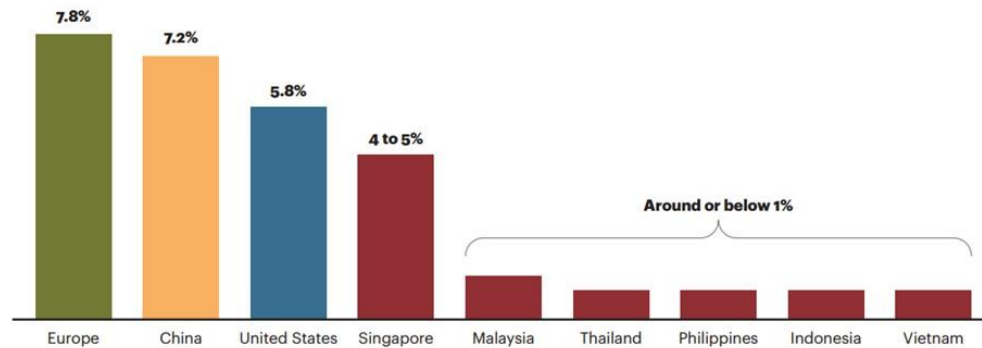


	1 2015 current	2 2020 business as usual	3 2020 with intervention
eCommerce contribution (RM billion)	68	114	170+
eCommerce growth (% CAGR)	12.8 2012-2015	10.8 2015-2020	20.8 2015-2020

Source: National eCommerce Strategic Roadmap

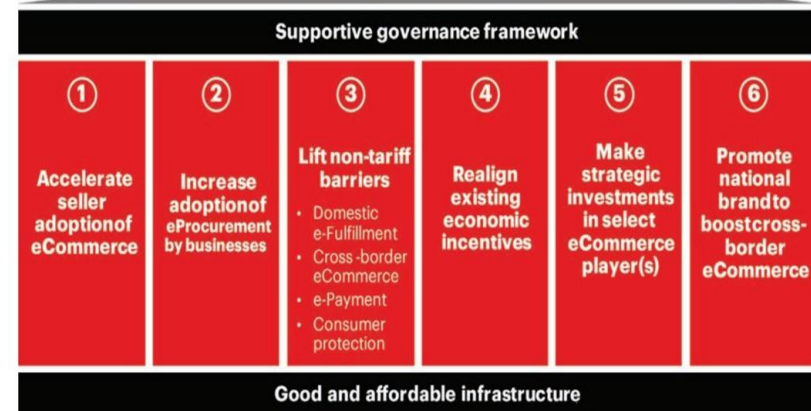
Percent of retail sales made online

(2014, % of total retail sales)



Sources: Frost & Sullivan; A.T. Kearney analysis

Doubling eCommerce growth



Source: National eCommerce Strategic Roadmap



# SSM BizTrust





# Digital Economy



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