The changes of consumer behaviour toward the well-known global brands under the rapid growth of E-commerce in Southeast Asia (SEA)

Research dissertation presented for the degree of
MSc in Global Brand Management

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Candidate Declaration

Candidate Name: Bui The Cuong

I certify that the dissertation entitled:

The change of consumer behaviour toward the well-known global brands under the rapid growth of E-commerce in Southeast Asia (SEA)

Submitted for the degreed of MSc in Global Brand Management is the result of my own work and that where references are made to the work of others, due acknowledgment is given.

Candidate Signature:

Date: August 2019

Supervisor Name: Kathy Clarke

Supervisor signature:

Date: August 2019

Dedication

This dissertation is dedicated firstly to my current job, ex-colleagues, bosses and amazing mother, Thu Nguyen who always supports me and gave me the chance to study master degree. I asked her a question 2 years ago whether it is too late to study MSc and the most motivated answer in my life is "it is never too late to learn the new things". I also would like to dedicate this work for my uncle who always inspire me about studying and my partner for his reassurance during the course. Lastly, this work is dedicated for beloved father, Bi Bui who always trust in me.

Acknowledgement

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Abstract

Southeast Asia market is a potential market for the development of ecommerce companies and well-known global brands. The ecommerce sites in SEA countries are very dynamic and enthusiastic with many well-known global brands. Besides that, the consumer behaviour in this market is also very unique, it is affected by many different factors directly and indirectly day by day as culture, religion, language, social media. Therefore, this research focuses on defining the key factors which affect the changes of consumer behaviour toward the well-known global brands under the rapid growth of ecommerce in SEA countries. To answer this question, the author built the survey for both online and offline with the same questionnaire and the depth questionnaire for experts in ecommerce industry as the focus group, in order to recognize answering satisfaction and struggling between the answers. Online shoppers are the target participants for the survey, the well-known global brands and ecommerce companies can be successful if they offer the products with good prices, conveniences, flexible payment methods, good UX/UI, especially the unique selling proposition to reach out the consumer interests compared to their competitors.

To summarize, the consumers in SEA countries are the smart consumption who are able to use the advancement of information technology to search the global brand products from different website and compare prices, offers before purchasing. The consumer behaviour is changed frequent due to the development of social media and fintech companies. However, they do not trust in the advertisement as before. Therefore, building the trust is necessary for both ecommerce sites and global brands if they plan to expand into this market.

Moreover, the rise of youth population and middle class in this region also contributed for the successful of many ecommerce sites and global brands, as they are the main target audiences of those businesses by their unique characteristics.

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1 Introduction

1.1   Overview

This research explores the main factors which affect the change of consumer behaviour toward the well-known global brands as Samsung, L'Oréal, Zara under the rapid growth of E-commerce in Southeast Asia countries (SEA). Besides that, the research investigates the most important key factors for the well-known brands to enter or enhance the brand awareness in the SEA countries. Through this environment, the research also focuses on the popular global brands in SEA such as cosmetic and goods products which are used by all generations and the effect of consumer behaviour to the changes of those brands strategies.

Logically, customer behaviour is the action that the customer takes related to any company or brand (Noel, 2009). However, for the marketers, it is a valued information for them to track and learn how to build relationship. For the high technology era and ecommerce, those behaviours often indicate some of engagement as views, purchases, return and payment method choices (Fontanella, 2017). The customer behaviour analysis is used for the company to identify the segmentation, key benefit for each group. That analysis can be applied for the company campaign to raise the company value.

Ecommerce is the process of buying and selling the product by electronic devices through website or mobile application with the internet connection. Ecommerce enable the shopper to buy and sell products on a global scale anytime and anywhere. There are many types of ecommerce as business to consumer (B2C), auction websites, internet banking or online ticketing…(Ecommerce Platform, 2018) the growth of ecommerce has expanded to sale using mobile device which is known as "m-commerce" and it is a subset of ecommerce. In addition, Ecommerce is multi-sides platform which has the customers are the seller as an individual seller or a local, global brands and the buyer. In this relationship, both sides will interact with each other to generate the revenue by the online transaction. As a result, Ecommerce company has to serve both seller and buyer as its target audiences to boost the interaction along with increasing purchasable rate (Tan, Tan and Pan, 2016)

Global brands are those brands which are recognized throughout much of the world, the firms using this unified approach have a similar marketing strategy to support the brand and its expansion around the world, to ensure the consistence in presenting the brand values in all markets. The successful global brand focus on presenting the unique, meaningful to the target market and the global brands employing the unified approach use a similar marketing strategy to support the brand and its development. It ensures consistency in presenting the brand value for all markets where it entered. The obvious advantage of the global brand that the firm is able to gain from marketing economy of scale. For instance, the same advertising strategy is able to be used worldwide which uses the same celebrity, content and image, "I'm lovin' It" is the slogan from McDonald and that slogan is used for all markets with different local languages (David, 2012)

Overall, the growth in emerging Asia especially Southeast Asia is predicted to remain robust in 2018 according to OECD Development Centre. The growth in SEA countries and China have taken on a strong trade recover and resilient domestic consumption. At the same time, the growth in India has a downward trend due to the taxation and money reform. The growth of region is also predicted to remain stable in the medium term. However, it is slow in China, and expected to stay speedy in India. SEA tends to maintain the strong growth momentum from 2018 – 2022 on robust domestic consumption, the development of infrastructures planned by the government (OECD Development Centre, 2018). The governments in OECD region are maintaining the accommodative monetary policy due to the inflation. Meanwhile the financial policy has been expansionary and keep continue. In addition, the next inflow of foreign direct investments is weak in some countries. GDP in Emerging Asia is expect to grow up by 6.5 percentage in 2017, and 6.5 percentage during 2018 to 2022 as the table below. Growth in SEA countries and China are uptrend in 2017. Laos, Myanmar and Cambodia are predicted to grow fastest out of 10 SEA countries until 2022, while Philippine and Vietnam are expected to lead in growth among top 5 SEA countries (Malaysia, Indonesia, Thailand, Vietnam and Philippine)

Figure 1: Real GDP growth of SEA, China and India

|	2016	2017	2018-22 (average)	2011-15 (average)
ASEAN-5 countries				
Indonesia	5.0	5.0	5.4	5.5
Malaysia	4.2	5.5	4.9	5.3
Philippines	6.9	6.6	6.4	5.9
Thailand	3.2	3.8	3.6	2.9
Viet Nam	6.2	6.3	6.2	5.9
Brunei Darussalam and Singapore				
Brunei Darussalam	-2.5	0.0	0.5	-0.1
Singapore	2.0	3.2	2.3	4.1
CLM countries				
Cambodia	6.9	7.1	7.2	7.2
Lao PDR	7.0	6.9	7.1	7.9
Myanmar	5.9	7.2	7.4	7.3
China and India				
China	6.7	6.8	6.2	7.9
India	7.1	6.6	7.3	6.8
Average of ASEAN-10	4.8	5.1	5.2	5.1
Average of Emerging Asia	6.4	6.4	6.3	7.1

Source : (OECD Development Centre, 2018)

Generally, the economy in SEA countries are developing very fast in the recent ten years, apart from Singapore which is already most developing market country in Asia. The rest country market is fresh which is the target for the e-commerce company to enter this opportunity market. Besides that, the population of southeast Asia contributes 8.56% of the

total world population (Worldometers, 2019). Twenty-five percent of the southeast Asia population is the millennial generation which is the main workforce and they are the target audience for the global brand companies, this generation is contributing for the growth of the economy in SEA countries by its consumption rate.

In the past, the consumers needed to visit the retail stores or the supermarket to purchase the product which is inconvenient. From 2012, with the development of communication infrastructure, logistic service, information technology…the e-commerce company had been launched in southeast Asia the first time. It contributes to the change of consumer behaviour and the way the consumer shops (Sandy, 2017)

Figure 2: share of population in Southeast Asia that use a smartphone from 2012 to 2018
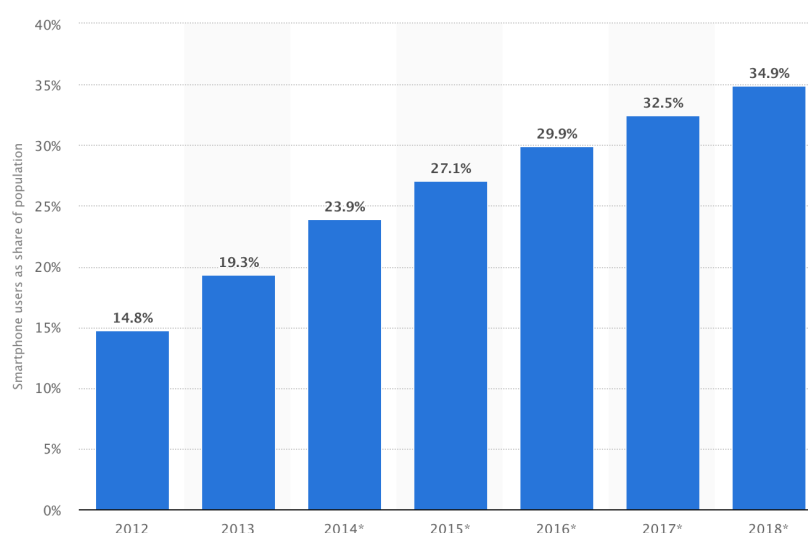
Source: (Statista, 2018)

Nowadays, the smartphone and tablet are very popular for all range ages in SEA. People are able to use 3G or 4G on daily basis to access the social network, suffering website and online shopping. On average, the consumers spend 3.6 hours per day for mobile internet, leading by Thailand with 4.6 hours per day and follow by Indonesia with 3.9 hours per day. While it is average of two hours per day in US for mobile internet. In addition, 51% of the smartphone users are the monthly active internet user (Hollander, 2017)

Trade barrier and tariffs are managed, some of trade barriers are removed to increase the trading between Asian countries. The export and import activities are more dynamic from 2011. Moreover, trade barrier and tariffs help to control the standard of foreign and local product. For instance, the increasing of price of imported product help to reduce its competitive advantage with the local product in the original market (Tracy, 2004). In addition, the government in SEA countries also created the competitive business environment for domestic and international companies to ensure that the domestic product is able to survive with their own characteristic as marketing strategy, product life cycle, road map. The Asian Free Trade Area is issued which support for local trade and manufacturing

in SEA countries and facilitating economic integration with regional and international partner (Radcliffe, 2018). As the result, the consumers are able approach the large range of product with the good price but higher product quality.

Asia and Southeast Asia countries are strong cultural countries, multi-language and multi-religion. However, there are some advantages from those countries that is the peaceful countries without the war or civil war this support the economies to keep growing up. In addition, half of the SEA countries as Malaysia, Vietnam, Singapore, Thailand, Philippine and Indonesia have the border with East Sea. This help the shipping industry to develop rapidly in Southeast Asia with the biggest ports from Singapore, Malaysia and Vietnam, it becomes the transhipment hub to connect the global and regional maritime shipping network due to the advantage of geography (Slack and Gouvernal, 2016)

In conclusion, with many advantages from the geography, human, political situation… Asia and Southeast Asia become the potential markets for the global brands over the world, and some of the ecommerce companies had been launched and developed successfully in those market. However, the appearance of ecommerce has driven the changes of consumer behaviour obviously, this research will explore the consumer behaviour in Southeast Asia toward the well-known global brand under the growth of ecommerce.

1.2   Research Purpose

E-commerce is growing rapidly in SEA countries in the last decade with many new e-commerce companies due to the raise of middle class, greater telecommunication, increasing of suppliers and logistic option, the innovation of payment methods (Dr. Adrian, 2015). The consumers have more options to purchase the product which was limited before. Nowadays, the consumer is able to buy the product via e-commerce website by smartphone or laptop anytime and anywhere. E-commerce company is the main catalyst for the change of consumer behaviour follow by the global brand strategy.

E-commerce is referring to the commercial transaction conducted online. Therefore, selling or buying activities via the internet is involved in Ecommerce (Guide Ecommerce, 2019). In SEA countries, Singaporean e-commerce market is mature, the Malaysian market is more dynamic, but Indonesia, Vietnam, Thailand and Philippine are in the early stage but growing rapidly. In those countries, the speedy development of technology infrastructure and increasing level of income are the opportunities for expansion of the existing players and newcomers. There are many e-commerce companies in SEA as Lazada, Shopee, Tiki, Tokipedia… which sells all kind of products to the online shopper.

In 2012, Lazada site launched in six countries with the headquarter is Singapore and it added the marketplace model to allow the third party retailer to sell their product through Lazada's website. In the early stage, it was run by B2C (business to customer) business model. However, to increase the onsite product Lazada had been changed to marketplace from 2013 (Akbari, 2019). Basically, marketplace is the platform for the seller to upload their product and sell it through Lazada's website and its network which already popular to the buyers.

The online marketplace is a website or application which facilitate shopping from many different sources. The marketplace does not store any inventory for purchasing, their role is to present the seller's inventory. For instance, Ebay, Amazon and Aliexpress are the biggest marketplace which sell everything to the buyer around the world (Kestenbaum, 2017). The e-commerce company builds the platform and provide the technology to run, manage to adapt the transaction activities. E-commerce company receives the profit as the commission through the successful transaction between seller and buys. Besides that, there are three types of marketplace as Vertical, Horizontal and Global. Vertical marketplace sells the same products which come from many sources as Zalora, it sells the clothes and related product. Horizontal marketplace also sells product of many types but it all shares a characteristic as the product function and attribute. The global marketplace sells everything from the small product to the big products as car, boat… Aliexpress, Amazon and ebay are the examples for the global marketplace which are very popular for Millennial generation.

In 2016, Alibaba bought Lazada which is the largest online shopping platform in SEA. This event has the huge impact to the e-commerce market in SEA countries since the product from Taobao is able to sell through Lazada platform which has the good price compared to domestic and cross border product. However, the consumers in SEA countries have more

choices, it is easy for them to buy the product from Taobao which need to go through the third-party before (Bien, 2017)

On the other hand, Shoppe is the second biggest e-commerce website in SEA which was launched the first time in Singapore in 2015. Sea group is Shoppe's parent company and it is the main competitor of Alibaba in China. Shoppe is run in 6 SEA countries including Taiwan.

From 2014, the majority of the e-commerce company started to provide the new delivery system which called Cash on Delivery (COD) payment. There is the huge impact on the consumer behaviour related to this payment method, the consumer is able check the product and decide to make the payment or return to the seller through the delivery partner. COD payment method motivates the consumer to purchase the product whenever they visit the e-commerce website from the catalogue page, instead of visit the retail store which is less convenient and depend on the retail store working hour (Hong and Cho, 2011)

On august, 2018. Lazada launched LazMall which cooperate with the global brands to sell the authentic and original branded product from L'Oreal, Apple, Samsung, P&G (Joe, 2018). This activity affects the consumer behaviour directly. Nowadays, shopper is able to buy the authentic product from the flagship seller which guarantee the product quality and able to return the product to the seller, this process is not allowed if the consumer purchase the product via third party.

In conclusion, after a decade, the ecommerce has been grown dramatically in Southeast Asia. From the very first stage, there were only retail products on ecommerce website, the appearance of marketplace has changed the market, along with the application of new technology and innovation, it helps the consumers are able do online shopping anytime, anywhere with many types of payment methods which are created and adjusted based on the consumer behaviour changes to reach their expectation. Besides that, SEA ecommerce is a potential market compared to the region, it explained why Alibaba and Tecent which are two giant ecommerce companies in China entered this market through the subsidiaries. For instance, the products from Aliexpress are sold on SEA markets through Lazada as Taobao Collection seller. In addition, the well-recognized brands as Samsung, Apple, L'Oreal, Zara… are very sensitive in predicting the trend. They have a strong understanding of consumer behaviour. Therefore, they corporate with the ecommerce company to launch, advertise the new products through the existing network to boost the sale rate. This research focuses on exploring the gaps in literature related to the factors which affect the consumer behaviour in SEA directly and indirectly whenever they choose to purchase the well-known brand products through online website. The last but not least, throughout this research, the audiences are able to have an overview about the changes of consumer behaviour relevant to the well-known global brands, having the depth knowledge about the trend of ecommerce. The conceptual framework is also created through this research (Page 31)

1.3 Significance of the Study

The most important of the dissertation is to support the global brands, marketers and businesses who want to know about the SEA markets under the rapid growth of e-commerce. There is more information related to the consumption rate in SEA countries which are known as the fastest growing region of Asia market. Moreover, the viewers are able to recognize which products, services that affected by the growth of e-commerce and consumer behaviour changes. As a result, the global brands are able to identify the reasonable marketing strategy, promotion activities, advertising and public relation for this region.

Generally, this research aims to be a valuable viewed peer article, the references for the concerned viewers that is the main target of this study. The researchers and students may use this study for their research which is related to this topic. This study also gives the information for the international and local company and help them to create the new concept of branding that may lead the market. The local consumer behaviour changes will be defined in this study to have an overview which might support the brands to avoid the unexpected fail expansion.

1.4 Research Objective

This research aims to define the reason why the consumer in SEA countries choose to purchase the well-known brands through e-commerce website. Nowadays, it is easy to find out many well-known brand products on online instead of offline. Those reputable brands have to change their strategy to adapt the consumer expectation, the answer for this question will be found out in this research. The author was born in Vietnam and working in a regional e-commerce company more than 4 years, the author would like to use his experiences with the knowledge from master degree course to discover the hidden part related to consumer behaviour changes. Besides the global brands, there are many local brands which have the specific plan to run their businesses via e-commerce channel and using the existing network from the site to reach out the international consumers (Walsh, 2012) . However, to be success in the market, the brands must understand the consumer completely and the external elements which may affect them to purchase the product as cultural sensitivities, prices, product attributes which are considered during this research.

The research objectives are evaluated as the exciting process to find out the answers about SEA markets, the consumer in this market, their purchasing behaviour and how it affects the existing well-known global brand and the new entrant brands. The potential questions for this research objectives are:

1- To determine the key success factors of the ecommerce companies in Southeast Asia and its relationship with the well-recognized global brands in decade.
2- To identify the key challenges and opportunities for the development of well-known global brands under the changes of consumer behaviour.
3- To find out the new potential factors which affect the changes of consumer behaviour and their purchasable decision in the recent years.

The framework will be built up by the questions above with the relevant articles and topics to complete this research. There are seventy popular e-commerce website in Asia and more than a half of them are launched in SEA directly or indirectly throughout the local e-commerce website as Tiki in Vietnam, Tokopedia in Indonesia (E-commerce Germany News, 2018). As a result, SEA countries are the potential markets in Asia countries. This dissertation will research the preferences regarding to the global branding, the consumer behaviour under e-commerce. That information will be the base for the new brands who planning to entry the SEA markets for the expansion and minimize the risk, for the marketers to create and build up the initiative advertising plans throughout the online/offline channel.

1.5 Structure of the Study

This dissertation is divided into 5 different chapters and each chapter contributes to the main research objective.

***Introduction* :** the economic situation and e-commerce in SEA countries are reviewed in detail. The appearance of e-commerce and its connection with global brands to adapt the consumer behaviour changes are discussed, it is also the research topic as the changes of consumer behaviour to the global brand under the rapid growth of e-commerce in southeast Asia. The research might support the international and local company, investor, start-up or for those who would like to run the business in SEA countries.

***Literature Review*:** focusing on answering the questions from research objective. The reasons of consumer behaviour changes when they decide to purchase the global brand products through online shopping. Moreover, how this change affects the global brand strategy in their road map for the expansion, it is considered as the advantage for the global brand product to reach out the consumer compare to the local brand products. Moreover, the factors which contributed for the growth of ecommerce in SEA is also considered as the development of infrastructure, the rise of middle-class, application of technology innovation. The literature review is to get the fully understanding for each part of this research objective. Finally, the conceptual framework is built based on the ideas and key factors as the picture of the whole literature review from peer review articles as the references.

The methodology and research design are two main key of the research. There is one survey will be given by online and offline channel to the audiences. The Positivism approach is suitable to create a framework. Therefor it will be used for this research. The audience is the consumer in SEA countries with all range ages and different location from countryside to the urban area. Besides that, data collection process also reaches out the expert in E-commerce industry as the author's colleagues who have the strong understanding about the situation of E-commerce in SEA countries. The participants from this research are highly security for the privacy, they also might skip the question if they feel uncomfortable due to personal issue. Google analysis is used to run the survey and Excel to analyse the feedback.

Presentation and Discussion of the Finding chapter goes through the responses from the online and offline survey. It also discusses the quantitative data. This chapter aims to explore the result of study in a deeper level and the root analysis of consumer behaviour changes.

Concluding Though on the contribution of the research, its limitation and suggestion for further research: is the last chapter of this dissertation, this part provides the valued recommendations based on the discussion from the previous chapter. Moreover, this chapter explains the connection between the research objective, question and the finding to demonstrate how stable the connection was.

2. Literature Review

2.1 Overview

The purpose of the literature review is to explore, define, evaluate the previous researches relevant to the research objective to create the conceptual framework for the study on the changes of consumer behaviour toward the well-known global brand under the rapid growth of ecommerce in SEA. As mentioned before, the literature review concentrate on the explore researches by expanding further understanding of the different angles of the proposition.

Firstly, E-commerce was a new definition and the ecommerce site had been launched the first time in US by Amazon in 1991. They started to selling the products online and many businesses have followed them. The convenience, safety transaction and user experience are some of the key success factors of the e-commerce website. The history of ecommerce was started 40 years ago until now and it keeps growing up rapidly around the world. Along with the developing of information technology, and the internet which are closely with the history of ecommerce. Michael Aldrich invented the online shopping in 1979 in United Kingdom, he used a modified domestic television to connect with a telephone line to show the real time user transaction on computer. This system was sold in UK, Spain and Ireland (Miva, 2011) Block Stacks Unlimited was the first online bookstore on the world which started from 1992.

In 1972, The first online transaction came from Stanford students when they sold the marijuana to MIT students at their artificial intelligent lab. However, when the World Wide Web arrived in 1990 it became the base for the development of online shopping, in 1995 Amazon launched online bookstore and it became the largest online retailer in the world without physical limitation as the stocks, number of products for the shopper demand. Nowadays, Amazon provides not only book but video download, toys , food, furniture, electronic devices, goods. The shopper's review was added in by Amazon the first time which has the huge impact on social media for boosting sale and revenue. In 1995 Ebay was launched as an online auction site which is successful in the market. In 1998 the online payment appeared the first time from Paypal and its service operates in more than 202 market. It allows the customer to send, hold and receive the fund in 24 currencies on the world. At the moment, there are more than 224 millions Paypal account and a half of them are active (Miva, 2011)

In 2001, Amazon launched its mobile commerce site the first time as the pioneer. During two decades, the mobile commerce has been grown rapidly. In US, more than a third of ecommerce sales were created through smartphone. In Asia, Alibaba is the first ecommerce site which was founded in 1999 by Jack Ma who received $80,000 from the angel investor to run an online marketplace in China, Alibaba also has a search engine partner as Yahoo Inc, this company spent $1 billion to receive 40% stocks in Alibaba in 2005 (Lulu Yilun, 2019). Alibaba offers everything from the baby napkin to the boeing through Aliexpress, Tmall and Taobao. The internet users in China increased speedily due to the expansion of Alibaba as the figures bellow:

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Figure 3: The internet penetration rate in China

The Countryside Catches Up
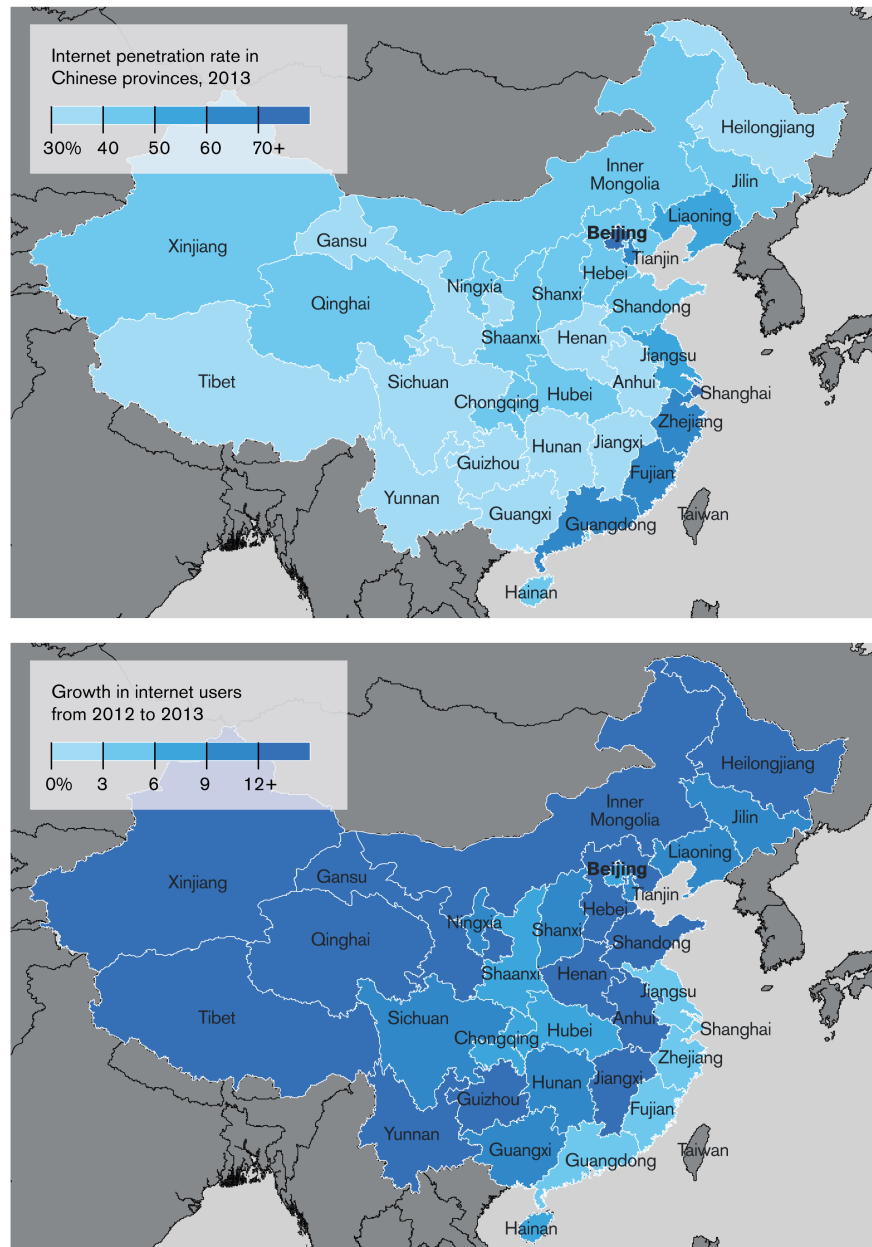
Source: China Internet Network Information Centre

Asia 's ecommerce market grows up quickly every year compare to the rest regions. As the report from United Nations Conference on Trade and Development 2017 ecommerce index.

Figure 4 : the size of B2C ecommerce by region
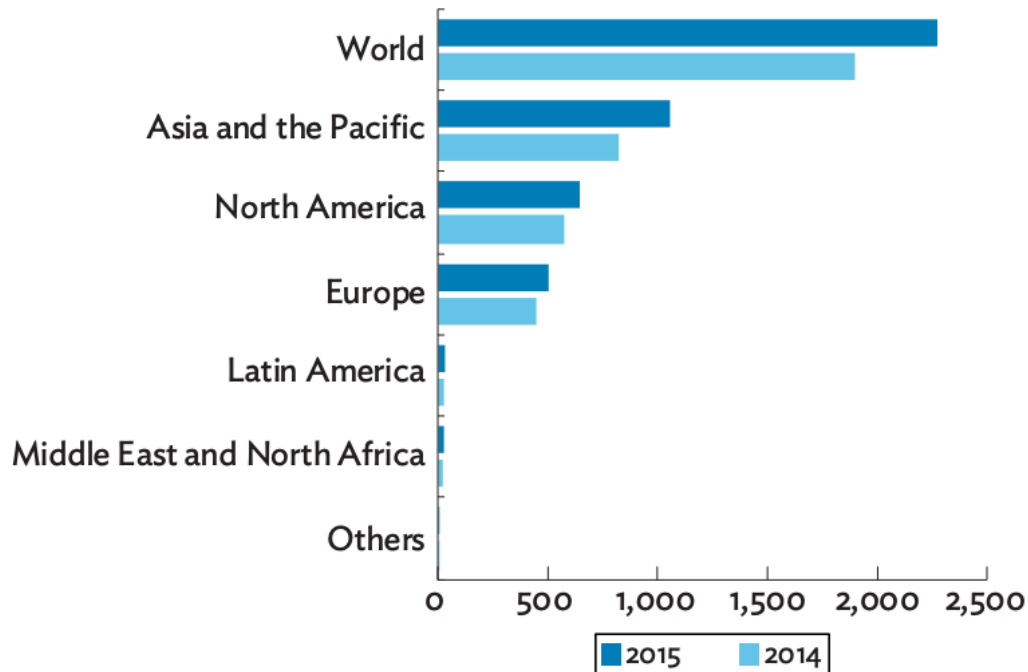
Source : Ecommerce Foundation 2016

According to Simone de Beauvoir "Buying is a profound pleasure". Therefore, there are many key factors which affect the consumer purchasing decision. Those factors influence buying decision help the consumers to recognized what their needs, also finding way to solve that needs. The factors affect the decisions might be different for each consumer. For instance, the consumer and their close-friend may share the same hobbies and interests, but they will choose the different types of the same product. The choice varies because it influences by different factor in their life. As a result, the ecommerce and the well-known global brands always keep finding out the common denominator to adapt the consumer's needs (Cowart and Goldsmith, 2007). There are some factors that influence the consumer buying decisions as bellow:

+ Culture: This is the most important key factors, it mentions the set of values, perceptions, ideologies of a specific community. At the early age, the consumers learn to recognize acceptable behavior and choices when they select the product.
+ Social : it includes the groups that the consumer belongs. Their social status also affects the purchase decision,; they need to interact to make decision. The social group as family can influence the consumer buying decision.
+ Psychological Motivations: this factor is divided to four smaller factor as
 - Motivation : each consumer has different demand based on the nature of needs, it becomes the motive, urges the consumer to seek satisfaction by getting it

- Learning: with the experience, the behavior is able to change, according to learning theory the people are exposed to strong motivations and positive reinforcements, their buying decisions is changed.
- Perception : this is how the consumers select and interpret the information before purchase the product. Perception might be different for each consumer.
- Beliefs and Attitudes : each consumer has a specific belief about the particular product. The belief is acquired or learned over time and it affects consumer buying decision.

+ Personal : the consumer characteristic as age, occupation, lifestyle and personality have the huge impact on the buying decision and behavior.

In conclusion, there are many key differences in Asia economy when it becomes to developing the ecommerce market. The most effective point is the cross border operation of ecommerce activities. For example, the consumer in Australia, China, South Korea, Singapore use the cross border ecommerce more than the rest countries (yStarts, 2017). In general, ecommerce was more specific in SEA compared to the other region as 45% of Malaysian and 60% of Singaporean ecommerce transactions were cross border products (Quan, 2017). The SEA population is 600M people, with the growing middle class rapidly and the rising of internet user, SEA is considered as the incredible potential market for ecommerce. SEA ecommerce size market is small but growing very quick, with compound annual growth rate of the SEA 6 countries as Vietnam, Thailand, Singapore, Malaysia, Philippine, Indonesia from $7 billions to $34.5 billion from 2013 to 2018 (Frost & Sullivan, 2019). Malaysia and Singapore contribute for a half of total online shopping sale in this region, although those country population is 8% of region population. Singapore users is the most active in region whom purchase the online product from oversea, two-third of Singaporean do online shopping more than once per year. In addition, there is no import Tax for the products which are bellow S$400, it motivates the consumer to do online shopping, Thailand and Malaysia also follow this action to increase the importing rate. Consumer behavior changes contributes as an important element of the growth of ecommerce in SEA, the ecommerce sites fully understand how the consumers do shopping and their shopping habits for each consumer segmentation. As a result, the incorporation between the ecommerce and well-known global brand will give a higher level of satisfaction for the consumer's shopping experience .

2.2 The role of Fintech and Payment in the growth of E-commerce

As mention from the overview. Fintech is the core base for the development of ecommerce. Fintech is the new definition nowadays, it is the companies or startups which combine financial and technology to support each other to grow up and generate the profit. Alibaba and JD.com are the biggest angel investors who often invest in Fintech companies to provide the consumer end to end service, payment methods or lending. Those services have a huge impact on ecommerce sale rating(Wright, 2017)

The payment process is one of the most important service provided by ecommerce system which decides the consumer's purchase. In the payment process, safe and timely payment is the priority of any payment methods. The banks often provided the channel to move the money as their role in holding the deposit and access to the payment network. On the other hand, the non-bank companies also have joined in the payment system. However, their roles are minimized in supporting functions. In the previous year, this traditional model has been changed in Southeast Asia as a majority of non-bank companies start to provide the innovation of new payment service. Those changes are affected by many factors. Firstly, the rising of smartphone user in SEA which generates opportunities for the new way of payment service. Secondly, SEA is the giant payment market, it is the attractive point for the startups, the venture capital investments (Creehan and Borst, 2017, p. 20). In Asia's culture, the people usually used cash in their life and avoid the non-cash transaction which was defined unsafe. Nevertheless, that idea has been changed due to the growth of information technology, people follow the ideas from the power countries as US or UK. Therefore, the non-cash payment has been grown speedily in SEA more than the rest regions as the figure below:

Figure 5: Non-cash payment growth from 2010 to 2014
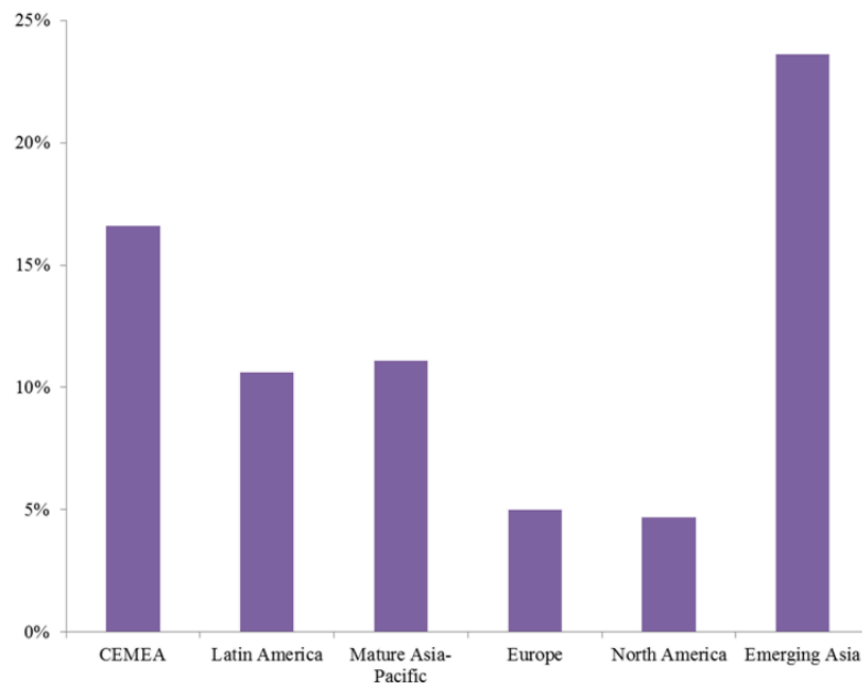
Source: World Payment Report 2016

The innovation of technology is changing in the different level of retail payment, the new payment technologies are applied by the banks quickly. They also cooperate with the technology companies to bring the most convenient payment methods to the user as contactless payment via NFC, QR code or smartphone makers provide the application in their product as Apple Pay (Apple), Samsung Pay (Samsung) which allow the users to tap their phones to checkout. The non-bank companies started to provide the digital wallets that allow the users to store the fund and use it for both online and offline as Timo, Zalo Pay in Vietnam, Wechat from China and Line from Japan. Those digital wallets are developed and managed by the Fintech companies that also support the expansion of online shopping as the increasing of user experience.

As the result, the development of Fintech and Payment companies contribute as the key success factor of E-commerce in SEA, it helps to bring the consumer shopping experience to the higher level through the application of new technologies in online payment processes which are very popular for the millennial generation. Besides that, there is a strong interactive connection between those companies and e-commerce sites as sharing the source of big data and support each other to grow up, generate the profit.

2.3 The rising of Millennial Generation in Southeast Asia

 The millennial generation was born between 1980 and 2000 and the ages from 23 to 35 years old. There are around 77 millions millennial in the world (Scott and Paul, 2009). There are 58 percent of millennial in SEA's population. Millennial generation is the largest generation in Southeast Asia force and in the world. The SEA countries keep creating the job for this generation since they are the high technology generation which are able to use the smartphone, laptop, social and high technology devices. Therefore, they are also the target audiences for the global brand due to their high salary compared to the rest generation. However, this generation is not stable and easy to be influenced by the influencers from social network or famous people.

This generation has created a new working style as work-life-balance, they always want to be happy with their jobs and more proactive compared to the previous generation, they prefer to work in the smaller companies with the hand-on role to make a big impact. In addition, they often do online shopping during the working hour by smartphone or laptop (Coomes and DeBard, 2004), they are the well-educated generation and much better connected. Millennial is defined as the disloyal generation; they leave the brand if that brand does not make them satisfied, according to the report from Aspect Software in 2014, more than a half of them left at least one brand every year due to the poor customer service. 84% of them dislike the direct advertising. The brand name is not the priority for this generation, they are into the own unique style.

Millennial prefer finding more than remembering, smartphone is their second brand. According to the research from SDL. They check their smartphone around 44 times per day. And 9 out of 10 of them never leaves their smartphones. They communicate with friends, family by smartphone via applications as Line, WhatsApp, Zalo, Viber , Facebook messenger which are very popular in SEA countries. Therefore, word of mouth has a significant impact for the global

brand marketing strategy. According to the report from Nielsen, more than 92% consumers believe the recommendation from their friends and family more than all kind of advertising. 65% of marketing executives from the global brand emphasize that they believe word of mouth is the most effective marketing strategy (Whitler, 2014)

Media Richness Theory :

Richard L. Daft and Robert H. Lengel introduced the Media richness theory in 1986 which is a framework to describe and evaluate communication media in the organization. Daft and Lengel searched to help the organization cope with the communication challenges as confused or unclear message, conflicting in spreading the message. Many scholars have test this theory to adjust it, and more recently Media Richness Theory has been readjusted to adapt the new media communication as online conference, online coursework, face-to-face conversation (Anthony, 1998)

The Media Richness Theory is explained as "the ability of information to change understanding with a time interval". It states that all communication media vary in the ability to enable the users to communicate to change understanding. The level of this ability is knowns as the medium "richness". Media Richness Theory set all communication media on a continuous scale based on its ability to communicate completely a complex message. This theory also includes a framework with axes going from low to high equivocality, low to high uncertainty. While low equivocality and low uncertainty stand for a clear and well-defined situation, high equivocality and high uncertainty describe as ambiguous event that need to clarify by the upper management. Daft and Lengel also mention that message clarify may be damaged when the multiple departments are communicating with each other, as the particular department had been trained in different skill sets or conflicting communication standard. The richness of a media is judged using the following criteria as bellow (Dennis and Kinney, 1998):

+ Capacity to include personal focus: each media has different levels of personal focus, especially when a media includes more personal feeling and emotion, the message becomes conveyed fully. For instance, the customer care service from the ecommerce companies often communicate with online shoppers by phone call to support instead of email or pop-up message.

+ Immediacy of feedback: the communication is completed when the reasonable feedback is provided. The feedback ensures any mistake in the transmission might be corrected immediately. In this case, the example as the well-known global brands and ecommerce site incorporate each other to provides the feedback as the action plan based on the change of consumer behaviour.

+ Conveyance of multiple cues: there are many ways that the medium of communication information is reached and those cues are able to be visual or auditory. For example, the onsite product from ecommerce site often includes the review video related to that product to motivate the shopper to purchase instead of the single product image. Those videos are made based on the target audience characteristic as age, hobbies, lifestyle.

+ Variety of Language carried: this explains the range of meaning might be conveyed by the use of language symbol, number or the use of natural language. The number describes the precision and natural language supports to convey the concepts and ideas.

As the application of Media Richness Theory, Lazada is a biggest ecommerce site in Southeast Asia, they run the application on smartphone, tablet and browser. However, Lazada UX/UI is always changed to adapt the changes of consumer behaviour in real time. To understand the consumer, they collect the feedback from the application directly when the consumers purchase the products or based on the site traffic from product catalogue page and product detail page. If the stock keeping unit (SKU) has the high traffic, it means that product is on trend and the other consumer will also look for that product. This is the valued information for the marketing department to run the marketing campaign to reach the consumer expectation also the change of consumer behaviour. Millennial generation is often influenced by the influencer. Therefore, Media Richness Theory is suitable to apply on ecommerce industry.

2.4 Global brand expansion

Generally, there are a long list of global brands which appear in SEA countries from fashion, food and beverage, electronic devices, vehicle…this market contains the global brands come from on around the world as US, Europe, Africa. However, Cosmetic, fashion and electronic devices will be called out during this research. There are more than 100 popular global brands which are able to recognize by millennial as the table bellow :

Figure 6 : List of top 100 global brands in Southeast Asia

Source: (Robert, 2018)

As the figure 4 shows that there are two global brand which come from Asia as Alibaba and Tencent which having the business in SEA countries through the subsidiaries as Lazada and Tiki, Tokipedia. The top 1 global brand is Google which are popular for all generation and it is also

the search engine partner for the rest brands. In the top 10 global brands, there is only McDonald's as the fast food brand the rest 9 brands are the technology brands. Those brands have a huge impact with the millennial generation as they were born and growing up with those brands in their life time. Fashion and cosmetic brands are also popular in this market due to its characteristic. The millennials grow up in the fast fashion industry with many global brands come from around the world as Zara, H&M, Uniqlo, Forever21, Topman… SEA countries are the potential market for those brands which bring the designs from the runway to the suture in order to capture the latest trend with the good prices (Carlton, 2010)

+ *Fashion industry*

There are little relevant academic literature regarding to the fast fashion in Asia Pacific, from the previous part of this research which called out millennial generation as the main target audience of global brands and ecommerce website. On a deeper level, an important characteristic of fast fashion is enhancing design. That characteristic explains why the global fashion brand as Zara, H&M, Pull and Bear are able to introduce the on trend fashionable products to reach the consumer demand (Kokanutaporn, 2014). Along with enhancing design, quick response technique is the process of short production and distribution lead time. This feature brings the high fashion product from the runway to the markets with the lower price version but still on trend.

Almost of the fast fashion global brand have been appeared in SEA's market, especially in Vietnam, the fast fashion brands just came 2 years ago as Zara, H&M, Pull and Bear however, the revenue is growing rapidly due to the high proportion of millennial in Vietnam's population. Vietnam's millennial account for a third of the total population, they are well aware of the latest trends through the social media. Besides that, the price of the fast fashion global brand is always higher than the local apparel brands, but for the millennials who have the stable job, the prices of fast fashion global brands are not pricey. In Addition, those brands have a fully understanding of the consumer, they reach out the millennial through online shopping and e-commerce company. The consumers are able to buy those apparel products online anytime, anywhere with fast delivery service (Noh Ka, 2017)

Figure 7: Fashion industry sales-growth expectations 2018-2019
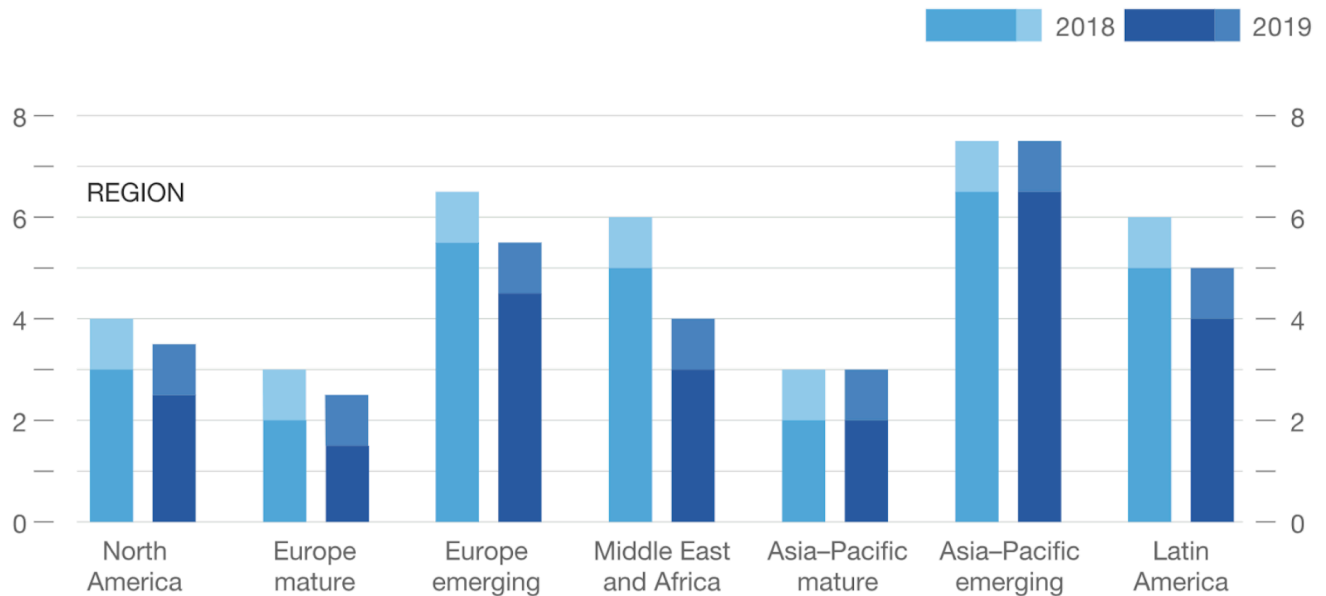
Source: (Michael, 2019)

With the impressive growth rate in Southeast Asia countries, the fashion market is definite attractive for global brands as the figure 5 above. There is a high sale rate of fashion industry in Southeast Asia, and a lot of new stores were opened in SEA's countries as the expansion. Both local and global brands have the advantages and disadvantage. For instance, the local fast fashion brands have their advantage as low cost, understanding of local culture, but they are lack of global marketing to build the global fashion brands. In Malaysia and Indonesia which have the Muslim population, the local fast fashion brands have more advantages for selling their product due to the cultural sensitivities (Cachon and Swinney, 2011)

+ *Cosmetic Industry:*

The cosmetic markets in SEA recorded rapid growth during the yearly report from the cosmetic global brands and the growth rate is affected by the economic development. The cosmetic market in SEA received the total revenue of $60,180 millions in 2016, it was increased by 7.1% compared to the compound annual growth rate. In a deeper level, the facial skincare generated $55,183 millions as 91,6% of the total market revenue. Meanwhile, the sale of body care products was $2,666 million contributes for 4.6% (Marketline Industry Profile, 2017). The SEA's cosmetic market grew by 8.4% to reach a value of $60,170 millions in 2016 as the figure 6 and 7 bellow :

Figure 8: SEA cosmetic market value from 2012-2016

26

Year	million	% Growth
2012	45,795.4	
2013	48,706.0	6.4%
2014	51,927.1	6.6%
2015	55,494.3	6.9%
2016	60,170.1	8.4%
CAGR: 2012–16		7.1%

Source: Marketline 2016

Figure 9 : The evolution of SEA cosmetic market value from 2012-2016

Source: Marketline 2016

The facial cosmetic is the biggest segment of the cosmetic market in Southeast Asia, it accounts for 91.6% of the total market value. The body skincare segment contributes for 4.6%.

Figure 10: The SEA cosmetic market per category segmentation in 2016

Category	2016	%
Facial Care	55,084.1	91.5%
Body Care	2,777.1	4.6%
Hand Care	1,015.9	1.7%
Make-Up Remover	865.0	1.4%
Depilatories	427.9	0.7%
Total	60,170	99.9%

Source: Marketline 2016

Supermarket and Hypermarket leaded the distribution channel in SEA's cosmetic market, it contributes for 28.8% of the total market value. The rest channels are average as the table below:

Figure 11: The SEA cosmetic market distribution in 2016
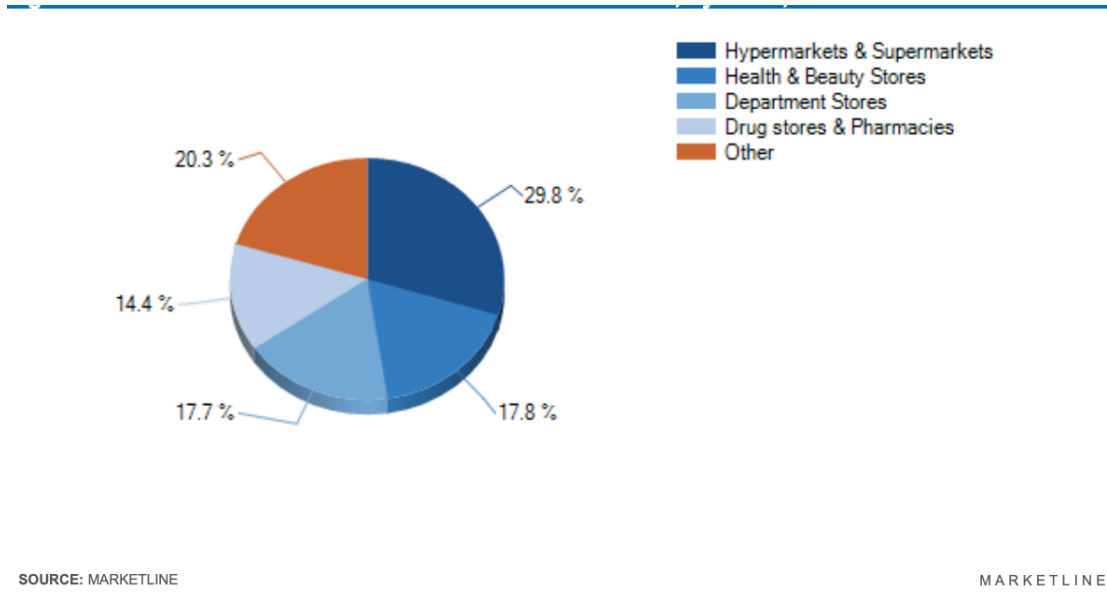
Source: Marketline 2016

In addition, buying the cosmetic products through e-commerce website is very popular nowadays, the global cosmetic brands often cooperate with the e-commerce company to launch the new product with the special price for the online shopper through the ecommerce existing consumer network. " 77% of shoppers agree that they expect the products they buy online to be the same as in-store" as the result from the survey from L'Oréal (Sauvé, 2019). Therefore, the packaging still plays an important role in satisfying the consumer expectation. The products are able to return to the seller if the packaging has not met the consumer expectation, more than a half of online purchase returns to the seller due to that reason. As a result, using the existing packaging for the ecommerce company helps to reduce the extra cost for the brands also meet the

consumer expectation and generate the revenue by this channel.

Moreover, millennials are the largest consumers of the ecommerce, they are also the target audience of the cosmetic brands, using ecommerce channel also help to reach out to those potential consumers who are in the middle class with a well-know about the cosmetic global brands. The existing logistic process of ecommerce companies are the effective benefit for the cosmetic brand to reach out the consumers in countryside or where those brands have not been settled yet.

+ *Electronic devices:*

According to the report from Retail News Asia, there are more than 732 million smartphone devices were sold in 2018, overall the consumers spent increased by 5%. Chinese market accounts for 60% and Indian market is 21% of the total market value, the SEA's market account for 15% (Retail New Asia, 2019). Along with the development of information technology and the rising of middle class, the consumers are able to spend the money for the electronic devices which are used for entertainment, hobbies, social life, communication. Nowadays, the consumers are able to reach the new technologies through the ecommerce and retail store easier than the past due to the change of government policy and the agreement contract related to trading between Southeast Asia countries. In addition, the rising of middle class in SEA countries is one of the main factors for the sale growth of electronic devices, the rising income as the result from hard working and ambition. There are 50 million new consumer join the middle class group from Vietnam, Malaysia, Indonesia, Thailand, Singapore and Philippine by 2022, the total middle class will expand to 350 million people and continue to upwards (Hoppe and Aadarsh, 2019)

2.5 Consumer Behaviour Changes

Understanding of Consumer behaviour is the key success factor for any brand who wants to reach out the consumer. In the recent years, the economic growth of each SEA country is speedy without affected from the global financial crisis. Indonesia is notable as rich in resources. The trends in GDP indicates among the southeast Asia countries as bellow

Figure 12: GDP of Southeast Asia countries

	2010	2015
Indonesia	707	1,212
Malaysia	238	336
Philippines	189	269
Thailand	319	461
Singapore	223	305
Brunei	13	18
Vietnam	104	176
Cambodia	12	19
Laos	6	10
Myanmar	43	61
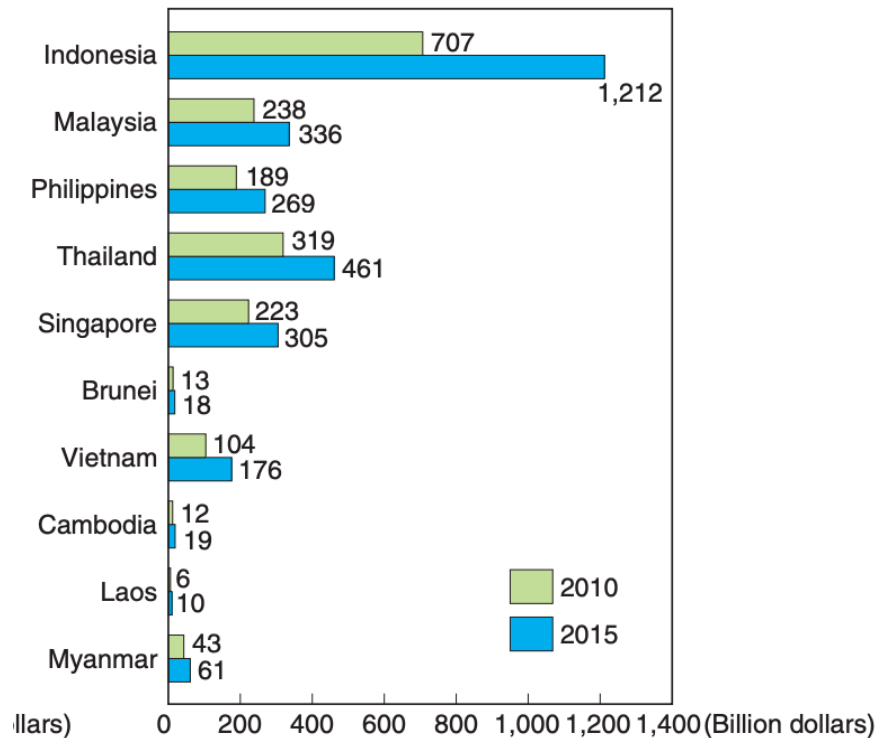
Source: World economic Outlook database, 2011

Nowadays, the consumer decision making is often affected by their family or friends and their idols via social media. The different culture is also one of the key factor which affects the consumer behaviour as it is mentioned in Hofstede's cultural dimensions. The individualism and collectivism dimension will affect the consumer to purchase the product or deny it (Hofstede and Bond, 1984). According to the long historical culture and geography. Southeast Asia countries are similar customs, traditions and culture as Malaysia, Singapore and Indonesia. The consumer in those countries are affected by the collectivism. Therefore, the consumer in this market often look for the recommendation from the group of experienced consumer who have already bought and used the products. Moreover, they are also affected by a new trend from the trend setters as the influencers on social media. For instance, Malaysia and Indonesia are the Islam countries, the woman from both countries often wear the hijabs, they often choose the design from the famous people as Muslim actress, singer (Hassan and Harun, 2016). In addition, a majority of global fast fashion brands use the influencer to advertise for their new products through social network as Facebook, Instagram, Twitter since those global brands understand that the consumers tend to use the same products with their idols.

The cosmetic industry uses the influencer and create the hashtag which affects the followers directly as #ForeverAgainstAnimalTesting from The Body Shop which have a huge impact on the animal lovers (Ilyse Liffreing, 2017). The millennial contributes as the largest part of the target audiences, they are well-educated and responsibility with their environment. As a result, their purchase decision making is also changed based on the corporate social responsibility of the brands. The brand activities will be evaluated by the consumer before purchasing process (Civera, Candelo and Casalegno, 2015)

There are many factors which affect the consumer behaviour, the consumer always looks for the new way to shop, and the most convenient for their life. Beside the cost of product, free delivery and return option, search function is the third important aspect for the consumer when they choose to do online shopping. Findability function helps the consumer to find out their product faster and easier, the consumers tend to leave the website if the findability does not meet their expectation during visiting period. To increase the traffic, the e-commerce sites need to understand the consumer behaviour change and keep updating their searching tool. The searching tool is also the feedback for the consumer satisfaction, this result is included the valued information about the wanted product from the consumer (Kuo and Chen, 2011)

In conclusion, understanding of consumer behaviour changes is key success factor for any ecommerce site or well-known global brands who want to approach the potential consumer or increasing brand awareness for the existing consumer. The consumer behaviour is affected by many different factors as culture, geography, ages, region, social media… to increase the sale rate, the ecommerce site and brand must understand completely the factors which affect the consumer behaviour directly and indirectly when they decide to purchase the product..

2.6 The advantage of Southeast Asia Countries.

According to the geography, all of the southeast Asia countries have the border with sea which is identified as the advantage for the sea logistic. It helps the trading activities smoother with the lower cost compare to air logistics and trucking. The global companies are easy to distribute their products around the SEA countries with the hub from one of the SEA country for the cross-border products. For example, Taobao collection product from Alibaba and Aliexpress are available on SEA's market through Lazada ecommerce website as the cross-border product, when the consumers purchase the product, it will be sent to Singapore and delivery to the consumer in SEA's countries by local logistic companies (Saisaard, 2018)

On the other hand, there are many agreements between the SEA's countries related to trading and tariff which help to support the local and international business. The agreement also supports for local business to export their typical products to aboard through ecommerce companies which will be more complex if the local brand do it by themselves.(Cai, 2003)

Moreover, SEA's countries are the tropical countries with have the stable weather compared to the rest regions. Therefore, it's the benefit for the business activities in SEA markets. The shipping processes are not affected by the external element as storm, disaster… Besides that, SEA countries have the rich resource and material for pre-production. Therefore, the product prices are lower which motivate the consumers to purchase. SEA countries have the huge opportunity to export the typical product around the world as tropical fruits, rice, coffee… (Ineson, Yap and Truong, 2012)

With there are many advantages from the Southeast Asia geography, SEA countries have a stable base to concentrate to develop the infrastructure, communication, technology and many more elements to boost the economies which include the online shopping in region.

2.7 Conceptual Framework

Figure 13: Conceptual framework for consumer behaviour changes toward the global brand under the rapid growth of Ecommerce in SEA
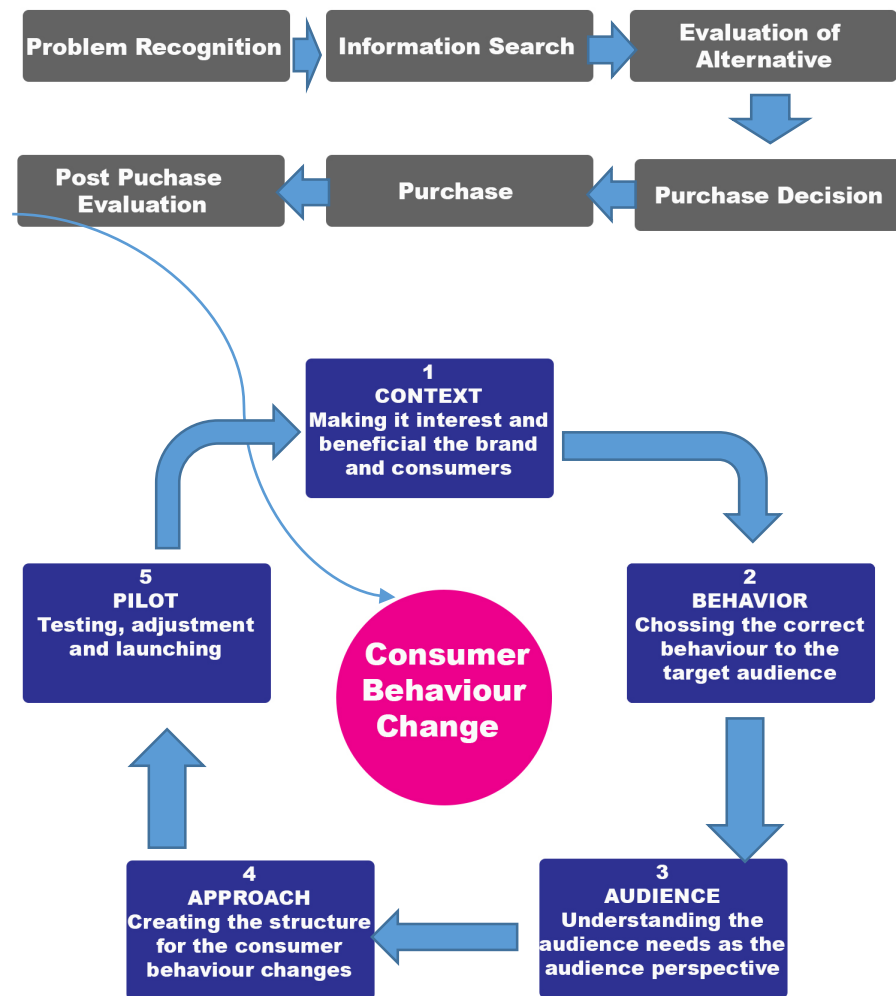
- Context is the starting point for consumer behaviour change. Behaviour change is an additional chance for the brand to delivery their product to the consumer, but it must be linked with the brand strategy and culture of the market (Haaland, 1974)

- Behaviour: the global brands need to set a smart objective for behavioural goal and it must be specific, measurable, attainable, realistic, and time bound (Joseph, 2018)

- Audience: understanding the audience as the audience perspective, this process is not a destination, it is a journey of review, define and adjust. The audience is the group of consumer or potential consumer who might reach out the brand for their needs (Group Perceptive, 2017)

- Approach: there are a lot of consumer behaviour research methods as survey, interview, focus group… and almost of them come from in-house marketing

department or external marketing research firm as agency, start-up. Consumer behaviour is influenced by different factors. Therefore, it is important to analyse those factors and build up the structure to approach the consumer needs (Gaile-Sarkane, 2009)

- Pilot: is the trial run of the new strategy, it is a scaled down version of the new strategy which will be implement. The result from the pilot is used to evaluate the process and the corrective action might run to minimize the risk.

2.8 Conclusion

After a decade, Ecommerce becomes the trend in Southeast Asia, it corporates with the global brands to reach out the potential consumers and earn the benefit for both sides. Basically, e-commerce platform is the multi-side platform which have the customers are the global brands and online shoppers. They receive the profit as the commission from the successful purchases on their website. In the recent years, the ecommerce in SEA countries are developing speedy due to the development of information technology and communication infrastructure. Along with the raising with middle class in the region's population, millennial generation is the main target audience for the global brand and ecommerce companies. However, this generation grows up in the era of technology and artificial world. As a result, their shopping behaviours are also changed due to many direct and indirect factors as the social media, culture, knowledge, their responsibility with the environment…

Cosmetic, fashion, electronic devices are the sectors which are affected directly by the consumer behaviour changes. Those global brands recognize that problem recently. Therefore, they started to change their branding strategy by understanding the consumer in a deeper level, the ecommerce platform becomes one of the main channels for the global brand to delivery their product to the consumer. In addition, the brands also uses the social media as the main channel to reach out the consumer through Facebook, Instagram, Pinterest and the influencers from the social life.

Asia's economy is growing rapidly without the effect from the financial crisis. In addition, there are many advantages for the SEA's economy as the large potential consumer, the supporting from the government as free tax, agreement, tariff and trading, the development of Fintech company also contribute as the important key success factor of ecommerce in SEA countries, it helps to apply the new technology in payment methods, consumer private information, funding, e-wallet.

However, there is a gap related to the consumer behaviour changes toward the well-known global brands under the expansion of ecommerce in Southeast Asia as the reaction from the consumers whenever they purchase the product from online shopping, the level of satisfaction from the consumer when they do online shopping must be find out in the next chapter.

3 Methodology and Research Design

3.1 Overview

To understand the proper factors which affect the consumer behaviour, the researcher has designed the suitable questionnaire for the survey which may help to call out the hidden part from the participants as their own opinions or experience in detail. Generally, the survey must be clear and easy to understand for each question, the participants have to be comfortable while they work on the survey. As the result, the author is able to collect the valued result which reaches the objectives as :

1- To determine the key success factors of the ecommerce companies in Southeast Asia with the well-recognized global brands in decade.
2- To identify the key challenges and opportunities for the well-known global brands under the changes of consumer behaviour.
3- To find out the potential key factors which affect the changes of consumer behaviour and their purchasable decision over the last decade.

For the research methods, this dissertation used the mixed methods analysis between qualitative and quantitative data. There are three types of methods as survey, observation and interview with the key people as the expert in ecommerce sector.

+ Survey: the list of 12 questions which are used for online and offline process.
#Online process : Survey has been sent to the participants via email, skype, facebook messenger.
#Offline process: the survey paper was provided to the participant

+ Observation: this method will be taken during the offline survey. The research focus on the participant's expression as language, tone of voice, facial expression to identify the trustworthy percentage of the information. Observation also support to recognize the reality of the result from each response during the survey implementation.

+ Focus group: this is the important method which is conducted with the experts who have the strong background about ecommerce in SEA. Their opinion, judgment, recommendation about the situation of global brands and ecommerce will be called out during the interview.

The survey is the methodology tool to reach out the participants with contains the question as below:
 # Survey questionnaire for consumer:

1	Which rage age are you in? A – 15-24 B – 25-34 C – 35-44 D – 45-54 E – 55+
2	Do you often do online shopping ? if yes, circle the category which you often purchase via ecommerce website

	A – Cosmetics B – Electronic devices C – Fashion products D – Books E – Other_____

3	What make you choose online shopping instead of offline shopping? (ranking type)
	    A- Good Price
	    B- Convenience
	    C- Customer Service after purchasing
	    D- Afraid of counterfeit product
	    E- Other_____

4	Have you ever received the counterfeit/fake products from online shopping?
	If yes, give out your opinion about that counterfeit/fake products ?
	    A- Yes ____
	    Your opinion :_____
	    B- No

5	Do you know that Lazada is the biggest ecommerce website in Southeast Asia, list down the reason you think Lazada has that position.
	    A- Reasonable Product Price
	    B- Good Product Quality
	    C- Fast Delivery Service
	    D- Good Customer Service
	    E- User interface/ user experience
	    F- Good website content quality
	    G- Many types of Product
	    H- Other___

6	Lazada , Shopee, Tiki, Tokopedia, 11street are the popular ecommerce sites in SEA. Which website do you often do online shopping ? why do you choose it ?
	    A- Lazada
	    B- Shopee
	    C- Tiki
	    D- Tokopedia
	    E- 11street
	        Why you chose it ?_____

7	Do you often return the purchased products back to the seller ?
	    A- No
	    B- Yes, what are the usual reasons?
	        a. Incorrect products: wrong model, colour, size
	        b. Damaged products
	        c. Long delivery time
	        d. Counterfeit or fake product
	        f. Other___

8	Which payment method do you often choose? A – Visa Card B – Cash on delivery

9	When do you often do online shopping ?
	   A- First week of the month
	   B- In the middle of the month
	   C- End of month
	   D- Anytime

10	Do you have any bad experience with delivery service ?
	   A- No
	   B- Yes, please provides your experience_____

11	In your opinion, can you please provide which part the ecommerce site and well-known global brand must adjust to satisfy the shopper ?
	   A- More promotions for shopper
	   B- Better customer service
	   C- Website/ application interface
	   D- Others_____

12	Do you often buy the product which is recommended by your friend, relatives or influencer ?
	   A- Yes
	   B- No

Questionnaire for the focus group:

Number	Question
1	In your opinion, what is the most important factors which motivate the consumer to purchase the well-known global brands through e-commerce site, why ?
2	How the consumer decision making changes from the early stage of ecommerce compared to now ?
3	In your experience, Can you please provide some bad experiences about the consumer behavior changes which affected the growth of ecommerce directly and indirectly, and how did you deal with those cases ?
4	What are the most important keys for the brands if they would like to expand through ecommerce channel with the effects of consumer behavior changes ?
5	Some people said "Ecommerce will destroy the traditional market and the local brands because of their strong understanding of consumer behaviour" what do you think about that review ? please explain in detail.

3.2 Research Philosophy and Approach

The research focuses on the human behaviour, it is the consumer behaviour changes under the fast-growing of ecommerce toward the well-known global brand. Obviously, identifying the factors which affect the decision marking when they tend to purchase any product from the well-known global brand through e-commerce sites. Nevertheless, identify why the consumer changes the way of purchasing the global brand product through e-commerce channel is the most important. (Prashar, Sai Vijay and Parsad, 2017). This research is reaching to each consumer in SEA to understand their online shopping habits. Besides that, the consumer environment might be considered as culture, influencer, geography, personal lifestyle. For each economic sector, it has the different reaction from the consumer. However, less complex, more convenient, comfortable and high quality products are the expectation result of consumer behaviour changes.

As mentioned from the literature review chapter, consumer behaviour might be found out from many case studies and articles but the academic framework is limited. As a result, the author looks forward to generate the basic understanding of consumer behaviour changes and predict how it happen which might support for the marketers, global brands aware of their strategy. E-commerce is also involved this process since it is the both side platform which have the customers are the sellers as global brand and online shopper. There is a direct effect to the online shopping field from the change of consumer behaviour as it reflects their service and robustness of the ecommerce brand compared to the competitors in the same fields.
Quantitative research is reasonable for my research methodology since the researcher focuses to investigate the topic matter from different consumer's point of view.

There is a lack of trustworthy data or uncompleted data about the consumer behaviour toward the global brand through ecommerce. To have a deep understanding about this topic, the researcher has to build it up by a focus group (from 10 to 15 people) and personally interview with the expert in this field who has a strong understanding related to the issue in consumer behaviour and global brand. With that positivist paradigm and the approach methods were mentioned above, my proposal may give out the possible result for the key successful factors of Ecommerce in SEA countries with well-known global brands, the challenge and opportunities for the well-known global brands and ecommerce under the effects of consumer behaviour changes and the reason why the changes of consumer behaviour happened.

3.3 Research Strategy

From the earlier sectors, the proposal appreciates the social reality which belong to the potential consumers in Southeast Asia and the global brands around the world which will enter the SEA market in the future. To investigate and find out the logic of consumer decision marking through online shopping. Qualitative approach is used for my research strategy through the survey, face to face interview and focus group. Survey is the best way to identify the factors which affect the consumer behaviour in particular as product type, payment methods, product distribution, influencer effects while the consumers are searching and collecting the product information for

the final decision making (Burnett and Lunsford, 1994). Cultural sensitivity and consumer habit are also considered during the survey when the consumers answer the questionnaire and give out their opinion related to their shopping habit.

Besides that, with the knowledge about Global Brand Management at Griffith College Dublin and working background in Customer Care and content quality management at the biggest e-commerce company in Southeast Asia. it gives me a chance to interview the expert in this field from many countries and lead to successful interviews with the obvious questionnaire. The number of question and duration of the interview are considered carefully to ensure the result is reflected the consumer mind-set definitely without skipping the question or interview question due to the time. The explanation of the result after data collection is an important step in theory to identify the purchaser preference of the consumer in SEA. "People rarely go below the line when answer the question" mean that the result from the survey is not deepest insight of the issue (Silver and Cohn, 2018)

Last but not least, the external elements are explained as the developing of economy, infrastructure, age range of population, information technology in southeast Asia contribute to the changes of consumer behaviour. Because there is the separation for the audiences. Therefore, the survey is used for all participants, focus group who have not had the strong knowledge in this field to understand the hidden parts which have not reached out before as the shopper expectations, shopping habits, own opinions. While the deep questionnaire list is used for the experts in the field to have the deeply understanding of SWOT of the growth of ecommerce, how the consumer behaviour changes affected the ecommerce and well-known global brands, what they did to deal with those changes. The result of data collection is analysed in the next chapter to identify the factors affect the consumer behaviour changes toward the well-known global brands under the rapid growth of Ecommerce in SEA countries.

3.4 Collection Primary Data

As mentioned in the overall approach part. This research was included three data collection methods as survey, face to face interview and focus group. In addition, each method will be designed with appropriate content and different questionnaire for the particular audience to ensure the result is in detail, structural and logical. The analysis quantitative and qualitative data will be explained by the deductive approach with the theatrical.

Methods	Selection benchmark
Survey	Using online survey to reach out the consumer in SEA countries as Thailand, Malaysia, Indonesia, Vietnam, Singapore, Philippine The target audience for the survey is the online shoppers who often purchase the product from e-commerce website. Besides that, the people who working in the e-commerce website will do this survey to give out the different point of view as the expert. The survey will be sent out by email and facebook messenger, also on the facebook group about the consumer in SEA, this survey is bi-language as local languages and English.

	Advantage: might reach out the huge number of consumer from many countries with different culture, geography, tradition, religion. Disadvantage: it may take a long time to run the survey and getting the response. The global brands may not appear in some countries, it may become a barrier for the data collection and clarification in the next step.
Focus group	The candidates are the heads of customer service from the e-commerce website in Vietnam, Philippine and Singapore, they are the experts in the customer care filed who can predict the consumer behaviour changes by their strong experience. Moreover, the candidate is also the key account manage from the e-commerce company who often work with the global brands in Southeast Asia for their campaign and strategy on ecommerce channel. The interview will be recorded by voice recording from Iphone, the content will be transcribed after the interview. This is the reasonable way of operating through the interview part. The focus group is separated by the range age and generation toward millennial and generation Z, because they are in the young population who often affect by the social network, influencers, they are also the main labour generation (Farrell and Hurt, 2014) The group are five people and divided by the same field with different range age to observer how they react the questionnaire.

3.4.1   Source

To complete the research and answer the question which the author has mentioned in the first part, the primary and secondary data will be main sources that I will be based on. Firstly, the secondary data is the valuable source as the articles, book, peer review which are verified the quality. Secondly, the primary data is built with questionnaires, theories from literature review and conceptual framework. As a result, the survey for the audiences and deep questionnaire list for the experts were created related to the conceptual framework in order to measure the consumer behaviour changes when they decide to purchase the products from the well-known brands through ecommerce sites. Both source of data is linked each other to demonstrate the issue. In the other hand, the primary data is also collected from the interviews with the experts in the field to compare with the results from the survey. The author expects to explore the hidden part which is affecting the consumer behaviour.

3.4.2   Access and Ethical Issue

As the author worked almost five years as a regional content manager for Alibaba in Singapore and in charge of the onsite product content for six countries as Vietnam, Malaysia, Thailand, Singapore, Philippine, Indonesia, cross-border team in Hong Kong and China. The author has many relationship co-worker, upper level management manager who are the leaders in e-

commerce field from many countries in Southeast Asia. This is an opportunity for the author to have the valuable responses for data collection in his research qualitative and quantitative data, due to his network connection with the experts in the field which may help him to reach out the deeper level of the growth of ecommerce in SEA countries from the expert's view.

Regarding to the research issues, all of the respondents of the interviews are mentioned as anonymous if it is their option. The answers are treated as confidential. Besides that, the guarantee that respondent who attend my data collection process are the volunteers. They are free and able to skip any question if they feel uncomfortable with the question due to the personal issue or sensitive question. In addition, with the research responsibility, the researcher must design and prepare the agreement form for clearly understanding to delivery to the respondent before the data collection processes.

The participants are the real consumers who are living in SEA countries and used to buy the product from ecommerce sites as their confirmations before taking the survey. Those participants do not have the strong understanding about the ecommerce processes, it helps to provide the trustworthy responses relevant to their shopping habits on daily basis as same as with their reactions toward the well-known global brands through ecommerce sites.

3.5 Approach to Data Analysis

To analyse the data and result which are collected from the interviews, codebook is a reasonable analysis technique which is used to achieve qualitative and valuable data after the data collection process as the focus group, survey and expert interview. The codebook contained many different parts as definition, code name, example passage (Guest and MacQueen, 2008). The data is labelled and categorized with its specific term, theme and pattern along with the mentioned framework.

Codes	Brief Description	Example
Ecommerce	Advantage and disadvantage	"More convenient, able to shop anytime anywhere, cannot see or touch the product before purchase"
Well-known Global brands online shopping	Benefit compared to the traditional way	"more discount, and guaranty the authentic product"
Shopping Habit	Influence by the external element	"purchasing the product as the recommendation from the influence, friends or relatives. I have not tried it before but read the feedback from internet"

 # Survey for consumer

Question 1: this is to identify the main target audience of the ecommerce as the generation whether it is the generation x, millennial or baby boomers. This question is also a sub-code to count the frequency.

Question 2: it provides the list of popular categories which is often purchased by the shoppers. The author wants to identify what the high sale rating category is. It also helps to explain the expansion of some brands compared to the other brand throughout ecommerce.

Question 3: This is a ranking type question; it provides the list of benefit from the online shopping compared to traditional. Throughout this question, the author expects to have the answer why the consumers choose to do online shopping and what they are worry the most whenever they shop online, and what affect the consumer behaviour changes.

Question 4:For Yes answers

Code	Definitions	Text Example
Cheap price	Mentioned quality and cheap price for lower income	" counterfeit has good price"
Same function	Counterfeit product has the same function with the authentic	" I choose due to the same function"
Same quality	Product quality is defined same as the original one	"I buy the fake product because it has the same quality

Question 4: for No answer

Code	Definitions	Text Example
Poor Quality	Quality comparison	" counterfeit is bad quality"
IPR Protection	Conflict with plagiarism	" The authentic product has a right to protect their value"
Bad Brand Image	Brand image is blurring	"the brand is affected by the fake product"

Question 5: The ranking question to identify the advantage from the ecommerce site, it also provides the disadvantage from ecommerce website which can help the ecommerce site to review their process.

Question 6 and 7: to review the participant's opinion. The result from those question will be compared to analyse the advantage and disadvantage between the ecommerce site, it expects to call out the consumer segmentation throughout their choices.

Question 8:

Code	Definition	Text Example

| Visa Card | Easy Pay | "Easy to pay without cash, more convenient" |
| Cash On Delivery | Check the product before paying, lack of belief in ecommerce site | "I do not believe the ecommerce site, I would like to check the product before purchase" |

The results from this question help to identify where the ecommerce is in the consumer expectation. Even though the payment process has been developed rapidly in decade with many option to purchase the product from ecommerce site. However, the consumer mind-set has not completely changed. There is the separation in the payment process due to the generation.

Question 9: Throughout this question, the author expects to know when the high traffic is, that is important for the ecommerce site to prepare the stocks, campaign to increase the sale rate. The consumer behaviour will be showed out by the result.

Question 10 and 11: These are the question to get the opinion from the consumer, their honest feedback may help to ecommerce site to review their operation from all department.

Question 12: Last but not least, some reports say the consumers are affected by the influencers and their relatives when they choose to buy the products from ecommerce site. The answer will help to verify that reports.

#Questionnaire for the expert:

Question 1: This question helps to identify the important factors which have the huge impact on the consumer decision making when they choose to purchase the well-known global brand through ecommerce site, with the view from the experts in the industry, who have the strong understanding about the ecommerce and its relationship with the brands. The author expects to have an overview related to the expansion of the ecommerce with consumer behaviour changes.

Question 2: for question number 2, the author planes to compare the consumer decision marking in the early stage and at the moment. The result from this process will help to call out the evolution of consumer behaviour changes, during this activity, the experts also provide the prediction for the upcoming changes from the consumer. It is the base for the marketers to prepare their marketing strategies and business activities.

Question 3: this question supports to show the hidden parts from the changes of consumer behaviour in the past which have not reached out before. During the answer, the author will link those cases with the development of ecommerce in the real time.

Question 4: The recommendation from the experts will help the marketer, agencies or global/local brands who want to enter this platform to generate the revenue by the expansion.

Question 5: for the last question, it will help to clarify the relationship between the ecommerce site and traditional market. The audiences may find out more value information during the answer from the expert.

According to the codes, it supports the researcher to analyse the transcript data to identify correlation with theme and theories within data to make the final research conclusion.

3.6 Conclusion

The purpose of this research aims to discover the factors which contribute for the development of ecommerce in SEA and the expansion of well-known global brand through ecommerce, many relevant factors are considered as rise of middle class, the revolution of information technology and especially the consumer behaviour changes. This research uses online and offline survey, face-to-face interview with expert in ecommerce and the observation. The survey is contained 12 questions. 4 out of 12 questions are the open-ended question to expect the opinion from the real consumer side from all range ages and also from many different SEA countries. The research method is used for data collection process is Positivism approach, it is able to reflect the research purpose. Besides that, the hypotheses are formed based on the facts which will be tested in the next chapter. Microsoft Office Excel was used to do data analysis for detecting findings of this research.

4. Presentation and Discussion of Findings

4.1 Overview

This chapter reviews and introduces the findings which were generated by the survey. The online and offline survey were designed with the same content of questionnaire, the uses of combination of online and offline survey to reach out a wider participant and get more accurate responses. The online survey was created on Google Form. Both online and offline survey were launched on 26th July until 2nd August (1 week). There are total 102 responses from 105 participants, it contains 83 online responses and 19 offline responses where the author conducted a focus group with the author's friend in the coffee shops. Those friends have been working on the ecommerce field more than 5 years with a depth understanding of SEA market, they also come from different countries and position. The target participants on this research focuses on all online shoppers with all range of ages, who used to do online shopping at least once in their life. However, the participant incomes have not been reached out enough in the survey due to the cultural sensitivities between the SEA countries.

The findings are divided by two parts, one is the result from the online and offline survey, the rest part is the result from the focus group. The author presents in detail for each question including the pie chart or line graph to display the number and percentage, factors in findings. Moreover, the author also explains and compares the survey results which relate to the research purpose then links them with research questions, the findings is the reaction during the research.

4.2 Findings

The findings are introduced through the results of surveys presented to the consumer behaviour changes. Those findings were used to evaluate the research objective based on the results in the timeframe and total number of participants.

4.2.1 Consumer behaviour changes under the growth of ecommerce.

Question 1: What is your age range ?

The participant age range
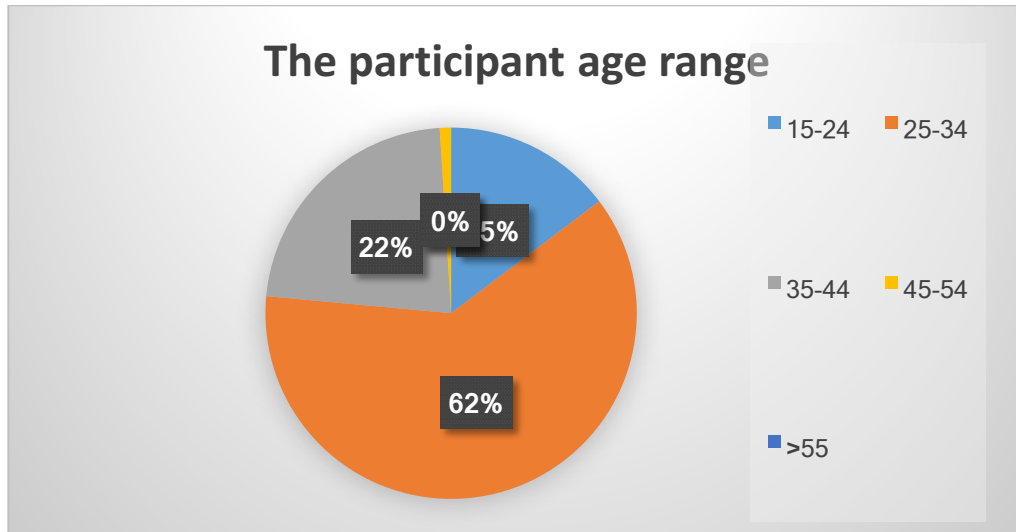
Age Range	Response	Percentage
15-24	15	14.7%
25-34	63	61.8%
35-44	23	22.5%
45-54	1	1.0%
>55	0	0.0%
	102	

According to the pie chart above, the highest group of age from 25-34 years old which contributes for 62% of the total participants. This age range dropped to millennial generation which is defined as the generation of worker. The millennial consumers have the income on monthly basis and independent finance with their family. Besides that, work life balance is the characteristic of millennial generation (Smith, 2010). With the rise of millennials generation in South East Asia, it is the potential market for the ecommerce and well-known global brands which aim to reach out this generation. The participants in the survey come from six countries in SEA as Malaysia, Singapore, Indonesia, Vietnam, Thailand, Philippines which are known as the developing countries with youth population (Samgjin, 2016). This can expect that the consumption rate is increased moving onward even though there is the different about culture, geography and religion.

Besides that, the second big group of age range accounted for 22.5% with 23 responses come from 34 to 44 years old. They are the mixed generation between millennial and generation X which have a stable jobs and income. For this age range, they are the skilled worker, mature and responsibility with their choices without the limitation of the high class products as long as it meets their expectation.

Question 2: Do you often do online shopping ? if yes, circle the category which you often purchase via ecommerce website
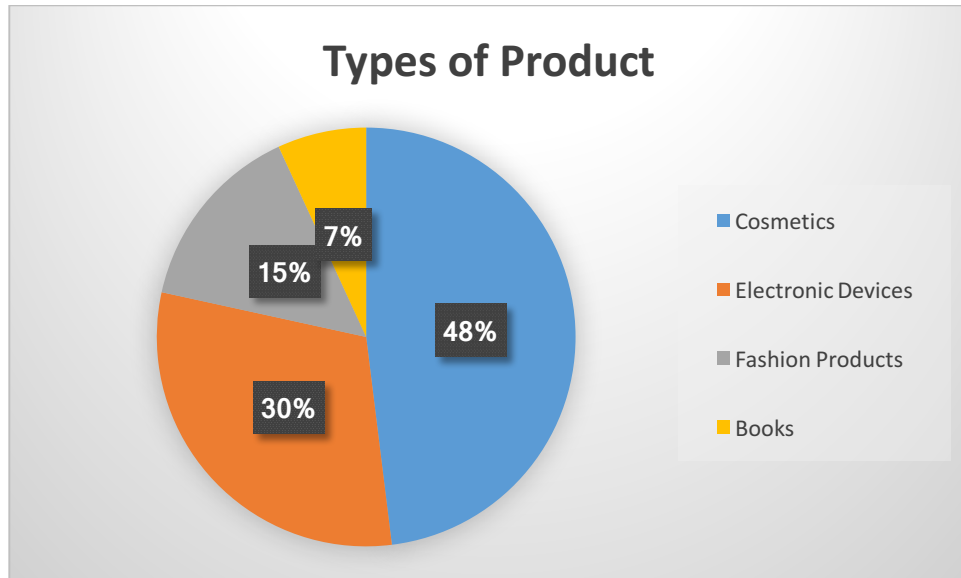
Types of Product

Type of Product	Response	Percentage
Cosmetics	49	48.0%
Electronic Devices	31	30.4%
Fashion Products	15	14.7%
Books	7	6.9%
	102	

The answer contained 102 responses from the participants and they also confirmed that they often do online shopping. According to the pie chart above, 48% of the participants focus on the cosmetics products when they do online shopping, these participants are both of male and female. As the policy from the ecommerce sites, the shoppers can return the product if it is fake or counterfeit products, it explained why the shoppers often purchase the cosmetic product through ecommerce compared to the rest type of products. The second top product type is electronic devices which account for 30.4% of total responses. With the cooperation between the ecommerce companies and well-known global brands, the shoppers can buy the electronic devices from the famous brand through ecommerce very easy as Samsung, Panasonic, Apple… which have the same warranty policy with offline purchasing, it motivates the consumers to buy the product without the worry of product condition.

The fashion products contribute for 14.7% of the total responses. The fashion products are included all clothes, shoes and fashion accessories.

Question 3: What made you choose online shopping instead of offline shopping?

Reason to chooce Ecommerce
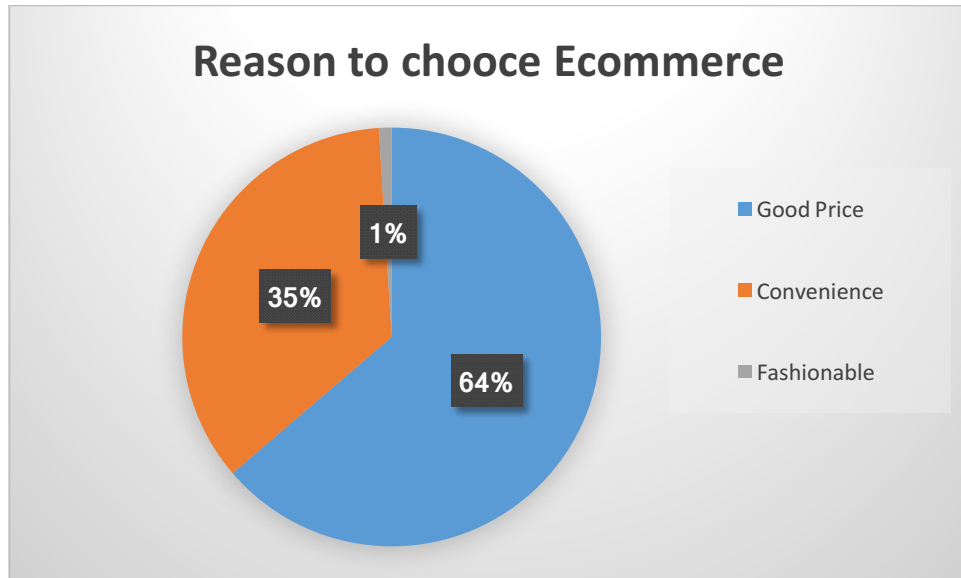
Reason to choose Ecommerce	Responses	Percentage
Good Price	65	63.7%
Convenience	36	35.3%
Other : Fashionable	1	1.0%
	102	

 This question got 102 responses from the participants with 63,7% of the total responses said that "good price" is the main reason which motivate them to choose online shopping instead of offline shopping.. Convenience is the second top reason which motivates the consumer to choose online shopping. As the result from question one, the main consumer is the millennial generation with work-life-balance lifestyle. Therefore, convenience is an important reason which push them to purchase the product via ecommerce sites. There are 35.5% of the responses agreed with that.

Question 4: Have you ever received the counterfeit/fake products from online shopping?
If yes, Give out your opinion about that counterfeit/fake products ?

Received the counterfeit products
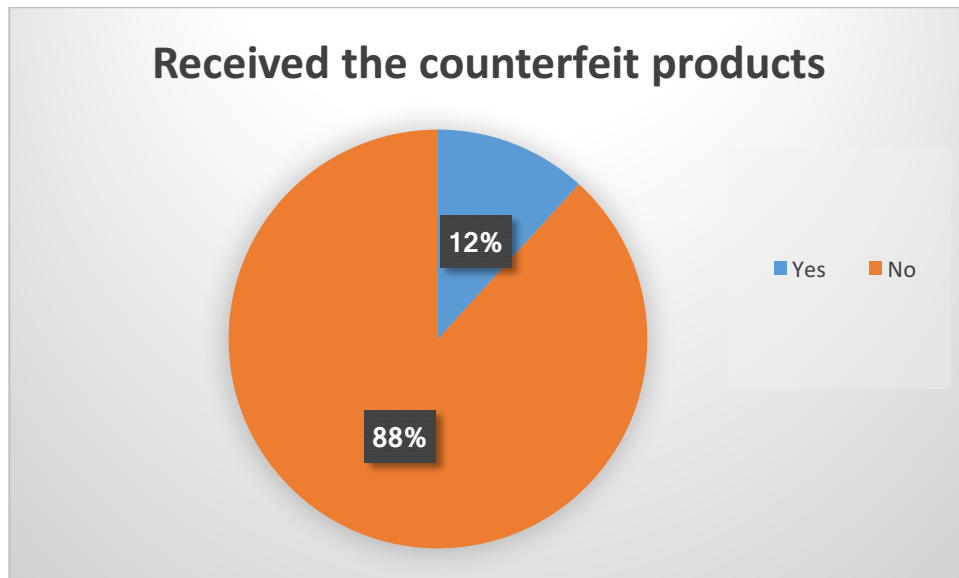
Received the counterfeit product	Responses	Percentage
Yes	12	11.8%
No	90	88.2%
	102	

For the first part of this question. Surprisingly, there are only 12 responses out 102 total responses who said that they used to receive the counterfeit products which contributes for 12% of the total responses and 88% of them said that they have not received the counterfeit products from online shopping.

Received the counterfeit product	Responses	Percentage
Unhappy	8	67%
Unsatisfied	4	33%
	12	

At the second part of this question, 67% of the participants informed that they are unhappy, and 33% of them are satisfied when they received the counterfeit products after purchasing.

Question 5: Do you know that Lazada is one of the biggest ecommerce website in Southeast Asia, list down the reason you think Lazada has that position.

The reasons for Lazada to be the biggest Ecommerce in ASEAN
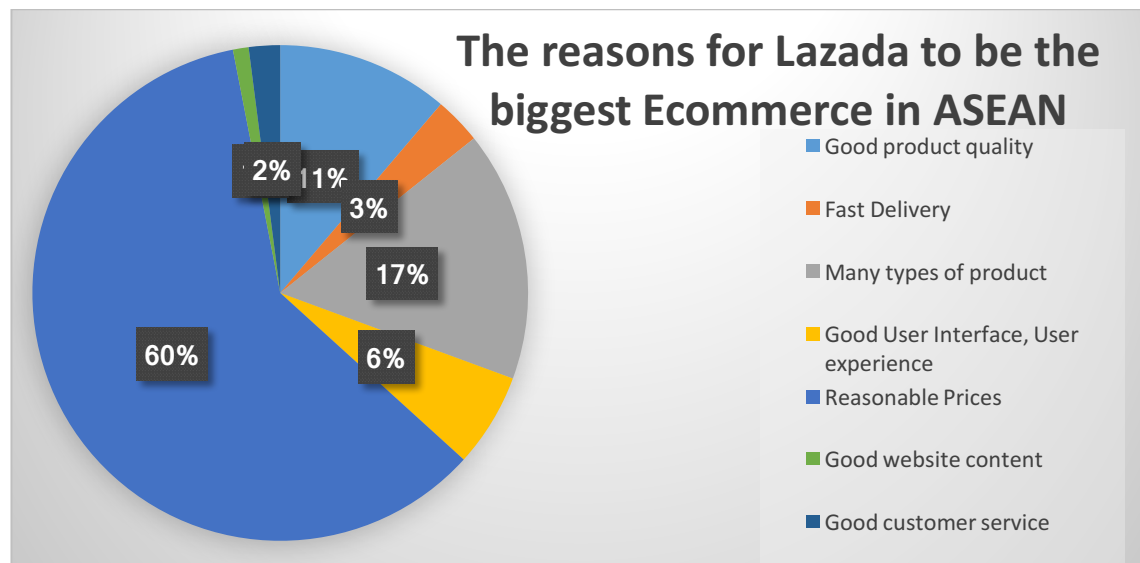
The reasons for Lazada to be the biggest Ecommerce in ASEAN	Response	Percentage
Good product quality	11	11.2%
Fast Delivery	3	3.1%
Many types of product	16	16.3%
Good User Interface, User experience	6	6.1%
Reasonable Prices	59	60.2%
Good website content	1	1.0%
Good customer service	2	2.0%
	100	

There are 100 responses for this question and 60.2% of the responses agreed that reasonable prices is the main reason which leads Lazada to be the biggest ecommerce in Asian. The second top reason is many type of product which accounts for 16.3% of the total responses. While there are 11.2% of the responses said that good product quality is the Lazada's advantage. 6% of the responses go for the good user interface/ user experience. The rest reasons have 3.1%, 1% and 2% due to fast delivery, good website content and good customer service.

However, there are 2% of the responses skipped this question without reason provided.

Question 6: Lazada , Shopee, Tiki, Tokipedia, 11street are the popular ecommerce sites in SEA. Which website do you often do online shopping ? why do you choose it ?

Which ecommerce site do you often do online shopping ?

There are 92% of the total responses answered this question, while 8% of the participants skipped the question without reason provided.

Which ecommerce site do you often do online shopping ?
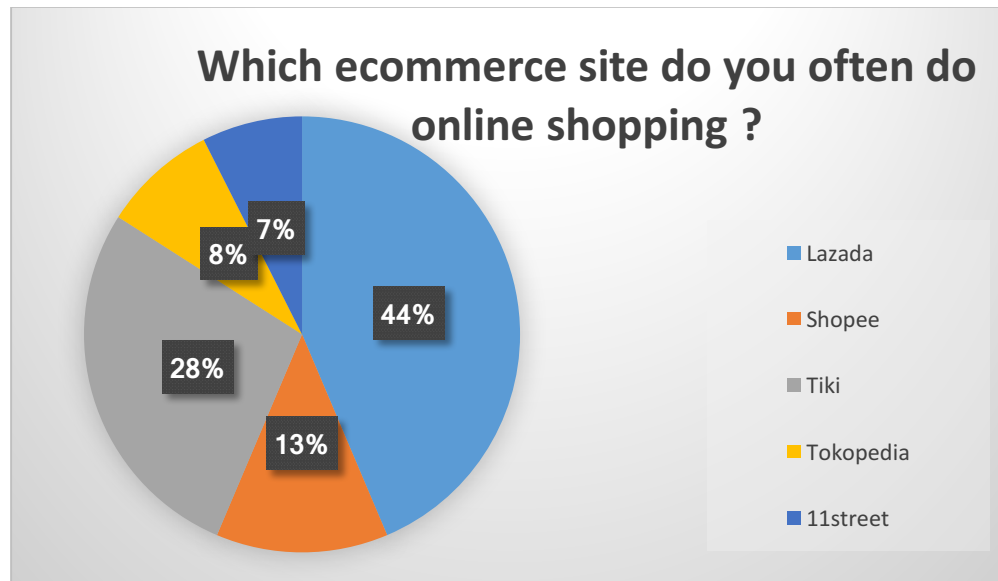
Which ecommerce site do you often do online shopping ?	Responses	Percentage
Lazada	41	43.6%
Shopee	12	12.8%
Tiki	26	27.7%
Tokopedia	8	8.5%
11street	7	7.4%
	94	

Why did you choose it ?	Responses	Percentage
Convenience (many type of products, accepting credict card)	45	48%
Familiar with that ecommerce site	19	20%
Reasonable prices	27	29%
Fast delivery services	3	3%
	94	
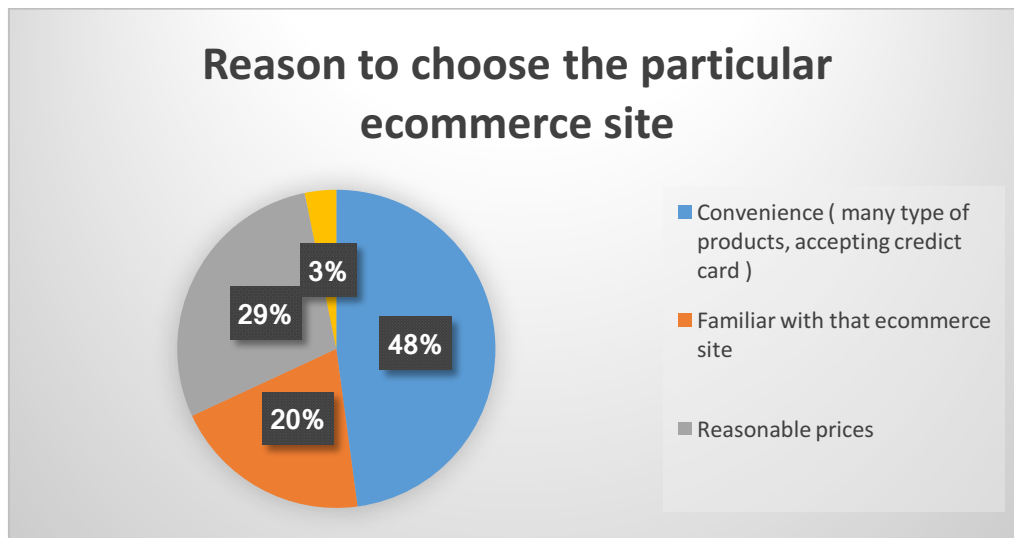
There 43.6% of the responses said that they often do online shopping at Lazada which is also the highest rate compared to the rest ecommerce sites. Following by Tiki, which has 27.7% of the total responses. In detail, Tiki is an ecommerce site which focusing on the books, magazines and the products from well-known brands. Shopee has 12.8% of response and the participant also said that free shipping is the reason which made them choose Shopee instead of the rest ecommerce sites. Tokopedia has 8.5% and 7.4% is the lowest rate for 11street, this ecommerce site comes from South Korea which was launched in SEA countries in the recent years.

48% of the participants informed that convenience is the reason for them to keep doing shopping on the particular ecommerce site, 20% of them said that they are familiar with that ecommerce site, 29% for the participants mentioned the good price as their priority, while 3% of them said that fast delivery service is their choices.

Question 7: Do you often return the purchased products back to the seller ?
If yes, what are the usual reasons ?

Do you often return the purchased products back to the seller ?	Responses	Percentage

Answered	94	92.2%
Skipped	8	7.8%

There are 92,2% response from the participant for this question. While 7.8% of them skipped the question.

Do you often return the purchased products back to the seller ?	Responses	Percentage
Yes	11	12%
No	83	88%
	94	

There are 12% of the total participants informed that they used to returned the purchased products back to the seller. Surprisingly, 88% of them said that they have not returned any purchased product back to the seller.
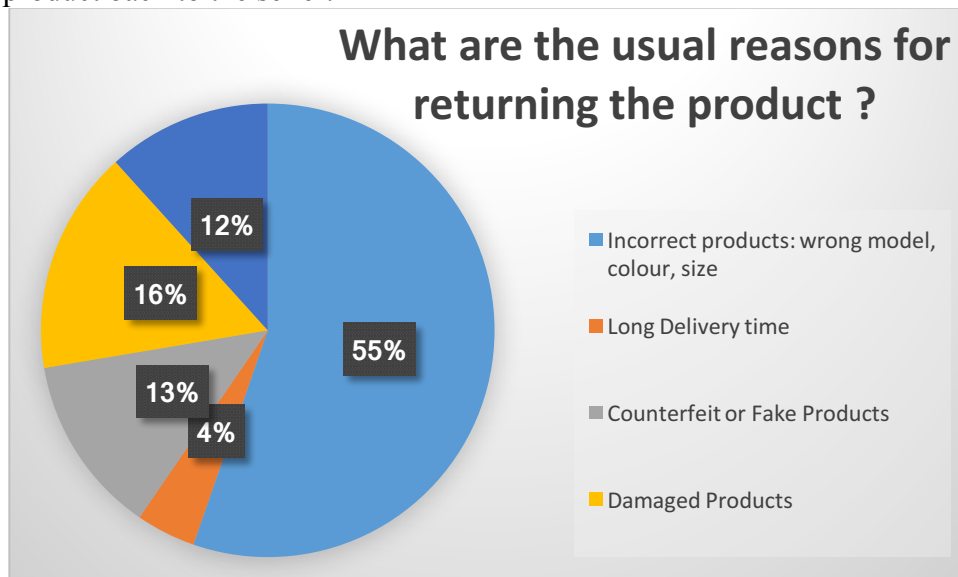
Do you often return the purchased products back to the seller ? if yes, what are the usual reasons ?	Responses	Percentage
Incorrect products: wrong model, color, size	52	55.3%
Long Delivery time	4	4.3%
Counterfeit or Fake Products	12	12.8%
Damaged Products	15	16.0%
	83	

There are 55.3% responses said that they often return the purchased products back to the seller due to wrong model, color, size, and it is also the highest rate. While 16% of them said "damaged products" is the reason of product returning. Counterfeit or Fake products contribute for 12.8% of total responses. Long delivery time is 4.3% and it is the lowest rate.

Question 8: Which payment method do you often choose ?

Which payment method do you often choose?	Responses	Percentage
Cash on delivery	34	34.0%
Visa Card	66	66.0%
	100	

There are 100 responses for this question, while 2 participants skipped this question.
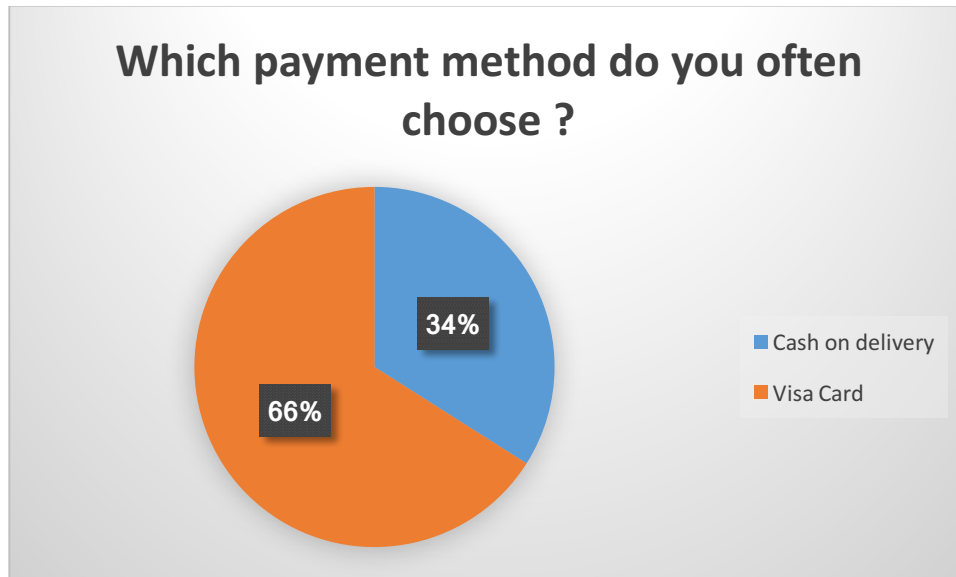
 All of ecommerce sites in SEA provide visa card and cash on delivery as the main payment method in the payment step. According to the pie chart, there are 66% of the participants said that they chose Visa Card as the payment method which they often use to purchase the product through ecommerce sites. And 34% of the participant informed Cash on delivery is the payment method they often use to purchase.

Question 9: When do you often do online shopping ?

When do you often do online shopping ?
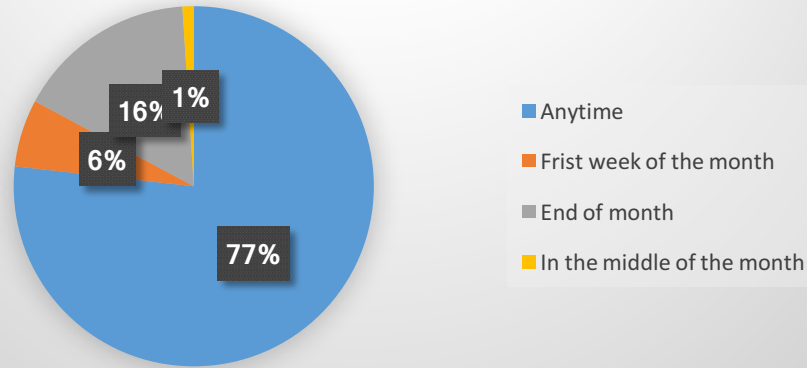
When do you often do online shopping ?	Responses	Percentage
Anytime	76	76.77%
Frist week of the month	6	6.06%
End of month	16	16.16%
In the middle of the month	1	1.01%
	99	

For this question, there are 99 responses and 3 skipped. 77% of the participant informed that they do online shopping anytime, white 16.16% of them said that they often do online shopping end of month. 6.06% of the responses agreed that they often do online shopping in the first week of the month. In addition, 1.01% of the participant do online shopping in the middle of the month.

Question 10: Do you have any bad experience with delivery service ?
if yes, please provide.

There are 79 responses for this question and 23 skipped.

Do you have any bad experience with delivery service ?	Responses	Percentage
No	33	41.8%
Yes	46	58.2%
	79	

Do you have any bad experience with delivery service ?

- No
- Yes

42%

58%

There are 58% of the participants informed that they used to have the bad experience with delivery service from ecommerce sites, while 41.8% of them said that they received the good delivery service after purchased.

Bad experience with the delivery service

- Counterfeir, fake product
- Damaged Product
- Wrong model, product, color
- Long delivery time

30%

54%

9%

7%
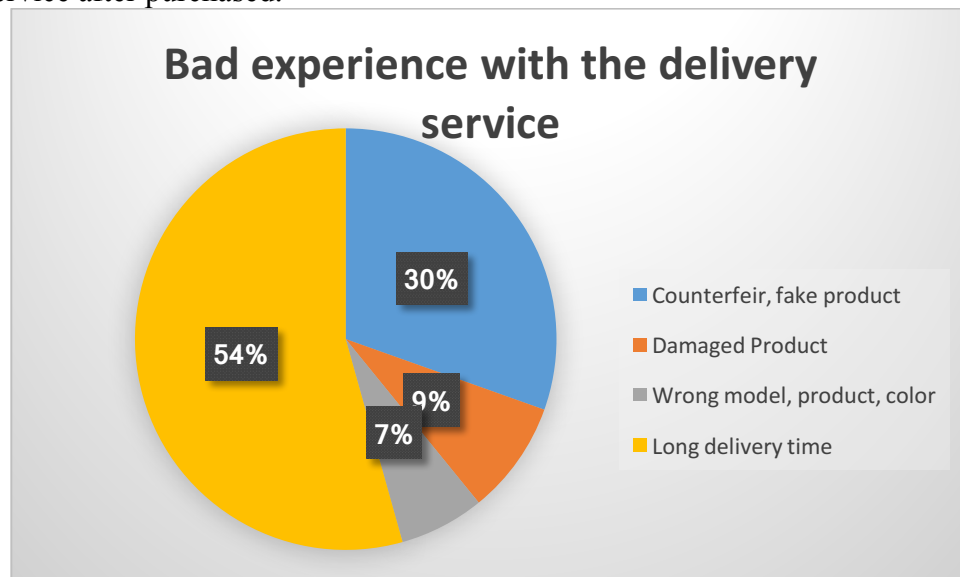
Do you have any bad experience with delivery service ? if yes, please provide	Responses	Percentage
Counterfeit, fake product	14	30.4%
Damaged Product	4	8.7%
Wrong model, product, color	3	6.5%
Long delivery time	25	54.3%
	46	

For the participants who informed that they used to have the bad experience with the delivery service from ecommerce site, 30.4% of them said they received the counterfeit, fake products. 54.3% of them said that their order took a long time for delivery compared to the estimated delivery time. 8.7% of the participants received the damaged products from ecommerce sites and 6.5% of them got the wrong model, product or colour which had not matched with their order from the beginning.

Question 11: In your opinion, can you please provide which part the ecommerce site and well-known global brand must adjust to satisfy the shopper ?

There are 100 responses from this question, while 2 skipped.

In your opinion, can you please provide which part the ecommerce site and well-known global brand must adjust to satisfy the shopper ?	Responses	Percentage
Better Customer Service	48	48.0%
More promotions	46	46.0%
Website/ Application Interface	4	4.0%

Better Delivery Service	2	2.0%
	100	

48% of the participant said that the customer service from the ecommerce sites must be improved, white 46% of them choose More promotion. It is also two biggest expectations from the shoppers. The rest parts are Website/ application interface and better delivery service which have 4% and 2% of the total responses.

Question 12: Do you often buy the product which is recommended by your friend, relatives or influencers?
There are 101 responses for this question, and 1 skipped.

Do you often buy the product which is recommended by your friends, relatives or influencer ?

Do you often buy the product which is recommended by your friends, relatives or influencer ?	Responses	Percentage
Yes	69	68.32%
No	32	31.68%
	101	

68.32% of the participant informed that they often buy the products through ecommerce sites by the recommendation from friends, relatives or influencers. While there are 31.68% of them said that they do not buy the products through the recommendations.

4.2.2 The consumer behaviour changes perspective from focus group

1. **In your opinion, what is the most important factors which motivate the consumer to purchase the well-known global brands through e-commerce site, why?**

For this question, almost of the participants gave out the advantage of ecommerce compared to the traditional market as:

- *"Convenience of everything in one place"* : While shopping for groceries or daily essentials, customers can also easily find their favorite brands on the same e-commerce website and add into the same basket and proceed to the check out at once. This reduces the effort to place separate orders on different brands' websites or proceed with separate payments. As customers are frequent shoppers on an e-commerce site, the payment details can be saved and makes the process even more seamless.

- Free Shipping Offer : Customers can increase their basket size to enjoy free shipping benefit, which they probably won't get while buying directly from brand.

- Reviews about products :Most e-commerce sites have reviews and rating section with feedback from real customers who have purchased and used the products. This is a great source for customers to search for information of a particular product before making their purchase decisions, especially for more expensive goods.

- Reputation : Well-known eCommerce who sells well-known global brands usually have the brands under official store (e.g. LazMall in Lazada, ShopeeMall in Shopee, or just as simple as put it as retail). This kind of selling model creates a sense of safety for customers to purchase the item; when it's sold by official store, they feel safe because they know it's not counterfeit, it has high quality and has same quality as they purchase in offline store.

-Price :Usually, eCommerce has exclusive deals or brand mega offer for those well-known brand, as we know that sometimes both brands and ecommerce do the price subsidy to make it price. Moreover, some brand such as Xiaomi has special partnership with some eCommerce like JD.ID or Lazada, surely since this is exclusive partnership, they usually offer cheaper price compared to other platform or even offline store

Familiarity : This is only applicable for return customers. Loyal customers are already familiar with the platform and they feel comfortable with the experience in the platform. Surely they prefer to shop comfortably in eCommerce instead of going out and spend pennies on taxi to get the product, while eCommerce is sometimes offering free shipping as well.

There are many advantages from ecommerce had been called out during the answer from experts. Especially, "review about product" this is a new factor which motivate the consumer to purchase the product. Nowadays, the consumers tend to read the product reviews from previous customer about the product they plan to buy. It helps them to have an overview about the product function or specifications. Product review also contributes as an important factor for the changes of consumer behaviour.

2 How the consumer decision making changes from the early stage of ecommerce compared to now?

According to the participants the geographical boundaries are no longer a limitation. Customers nowadays are able to purchase products from all over the world with a simple click. Because of

this reason, customers have many more options to choose from before making their final purchase decision.

Customers are able to make much more independent and personalized decisions. With the advancement of the internet, technology and personal gadgets (especially mobile), information is accessible at every individual's fingertip. Customers can easily search for any product on different e-commerce websites to gain information about the product, compare price and other product specifications. The electronic environment provides tools for information search, storage and decision analysis. This helps individual to make purchase decision independently without the involvement of others. Intensified media exposure is also changing consumers' decision making process. Consumers are able to compare solutions more intensively.

In the world of E-commerce, companies are also very proactive in personalizing the experience of a customer when shopping on their sites. This can be highlighting past purchases, recommending similar purchases, complementary products, alternate products, etc. to influence the decision making process. Because of this personalization ability, customers are exposed to more product collection that are highly compatible to their preference. This can help customers make more accurate choices, but can also lead to additional purchases compare to the first purchase intension.

"Early stage: Reliability
Goal: product is delivered to customer
On the early stage of ecommerce, customers are still used with offline transaction because they can meet the seller in person and they can touch & check the product directly as well. For ecommerce, it is important to offer reliability of their platform whether they can really deliver the product or not."

"Current stage: Promotion & deal
Goal: get products as cheap as possible
Once they feel like the platform is reliable, and as time goes by, more ecommerce platform is rising and growing with many more options, it's time for deals & promotions competition among each platform. In this stage, customers will find which platform has the cheapest price"

"Future stage: Customer experience
Goal: end-to-end customer journey
At that time, they feel familiar with the platform and the promotion, it's kind of building habit for customers. In the future, all ecommerce will operate 'evenly' with more stable competition, which makes customers shift from getting the products as cheap as possible to their end-to-end journey; how's the platform findability, check out experience, easiness of payment, and return process."

   3. In your experience, Can you please provide some bad experiences about the consumer behavior changes which affected the growth of ecommerce directly and indirectly, and how did you deal with those cases?

As customers are no longer stick to one media at a time, it is more challenging for e-commerce to create effective communication strategy to reach their target customers. Purchase strategy is

different by demographic groups, as they have different media preference and habits. Thus, to cope with this, it is important for e-commerce to understand the purchase strategy of each specific demographic group in order to reach them effectively while marketing or promoting for new products.

"When the demand from customers are getting high and more unique, it takes more effort for ecommerce to fulfil it. Bad one is now customers are always seeking for promotion, cashbacks, and deals; it feels like they don't want to spend money unless there's promotion. In this case, ecommerce and brands need to invest more on promotion, which impact less margin or more budget for promotion side."

4 What are the most important keys for the brands if they would like to expand through ecommerce channel and adapt the consumer behavior changes?

"-Branding should be consistent across channels:" Make sure all brand communication materials are consistent across platforms when extending to ecommerce. Consumers expect brands to maintain consistency across all online and offline channels so that they will trust and feel comfortable buying your products online.

"-Use personalized strategies:" As there are so many ways to reach customers these days and influence their purchase decision, brands should utilize and take advantage of personalized functionalities such as personalized product recommendations, personalized newsletters and emails.

"-Focus on mobile e-commerce:" Mobile has become an integral part of an individual's life. The new generation is becoming tech- savvy. Majority of e-commerce purchases are done via mobile phone. Thus having a great browsing and shopping experience on mobile will play an important role in the success of brands on e-commerce.

5. Some people said "Ecommerce will destroy the traditional market and the local brands because of their strong understanding of consumer behaviour" what do you think about that review? please explain in detail.

There are 2 parts of this questions and It should be answered each of them individually.

1. Will e-commerce destroy the traditional market?

"Traditional market sales have been declined significantly in the last decades. Consumers switched to online shopping mainly because of the convenience and personalized experience that it can offer. If brick and mortar stores are in for the long run, they will be required to prove themselves in the race of quality and convenience. If traditional market can become Omni channel and offer better services that can enable customers to shop easier and faster, they would be able to survive."

2. Will e-commerce destroy local brands?

"In my opinion, e-commerce is a big potential for local brands to extend their customer base and potential extend to international customers. As we are in a society driven by technology, local brands should get themselves in the game and start investing in digital transformation. "

Ecommerce can be a big boost to traditional market and local brands. It can widen their audience and even lessen their over-head costs. But a wider audience also it will take a lot of learning and adjustment to be able to succeed. I hope the platform will consider and invest how to educate traditional business owners more and help them adjust to the ecommerce business.

"I think it's not actually about strong understanding of consumer behaviour, but it's about the demand on technology side. As time goes by, we have more and more sophisticated technology and we need to adopt with that changes. Many things will shift from manual to automatic, traditional to modern, including market itself."

4.3 Discussion of consumer behaviour changes survey findings

Firstly, the first question of the survey identified that almost of the participant are the millennial generation from 25 to 34 years old. That age is also the main worker of the world who are independent about the finance with the regular income on monthly basis, compared to the rest age ranges, the millennial generation has its own unique lifestyle as work-life-balance. They were born in the information technology era. Therefore, they have the chances to apply the new technology to their life to make it easier and more proactive which is the core base for the growth of ecommerce. This generation uses ecommerce to purchase the necessary products which are reviewer by the previous consumers with the real experience.

Almost of the participants used to do online shopping in their life, cosmetics is also the most popular category which is often reached out by the online shopper. 48% of the participants choose to buy the cosmetic products through ecommerce site, it demonstrates the sensitivity of the well-known global brands in increasing the brand awareness, the brands corporate with ecommerce sites to launch a lot of marketing campaigns, promotions and also introducing the new products. Therefore, the consumers have many benefit from those campaign compared to purchasing from the traditional market. For instance, L'Oreal and Lazada signed off a contract for fulfil next day free delivery, also sharing the technology for searchable function which help the consumer to find out the product easily (Yen, 2019). The second top category is Electronic devices which contributes for 30% of the total responses. Same with the cosmetic brands, electronic device brands also recognize the important and benefit of ecommerce for their branding processes. By tracking the purchasable rating from ecommerce sites, the well-knowns global brands are able predict the consumer behaviour changes during their shopping habits. In addition, the electronic devices brands also use ecommerce sites to reduce the inventory clearance. For instance, the ecommerce sites in SEA countries have the special campaign as 11/11 and 12/12 as the biggest campaigns of the year as the product price might sale up to 50%. Books and Fashion products are also in the list of purchasable category, however it is lower than Cosmetic and Electronic devices due to particular reason as size chart are often different for fashion products.

There are many reasons for the consumers to purchase the product through ecommerce sites. However, good price is the most common reason from the participant who joined the survey. 63,7% of the participant confirmed that good price is the reason which motivates them to purchase the product via ecommerce sites, instead of traditional market. The ecommerce sites and well-known global brands signed off many contracts related to the brand partnership which help them to share the technology innovations, capacities and infrastructures. Consumers is the target audience from those contracts, the cooperation helps the brands and ecommerce sites to decrease the overhead fees which affect the final goods price directly. As the result, the product price on ecommerce site is always lower compared to the traditional market. Convenience is also chosen by the participants. From the previous question, the millennial generation was defined as the main target audience of ecommerce with their unique lifestyle, they often apply the new technology innovation into their life to make it more convenient and optimize the efficiency. 35.3% of the participant purchase the product through ecommerce due to the convenience it brings to the consumer. The well-known global brands and ecommerce understand the consumer clearly, therefore, they launch many features to satisfy the consumer shopping experience as fast delivery, free shipping for the large basket, next day delivery, cash on delivery…etc. The consumer behaviour is also changed due to those features. For instance, in the past the consumer had to pay before the delivery but now they can pay when they receive and check the product from ecommerce site, if the delivery time is too long, the consumer might cancel the order and they also track the order by tracking number which is provided by the ecommerce site. Nowadays, the consumer is more proactive in the way they shop. Therefore, the ecommerce sites have to change themselves to adapt that and reach out the consumer satisfactions.

Fortunately, there are only 11.8% of the participant confirmed that they used to receive the counterfeit product while purchase the product from ecommerce sites. The rest of them said that they have not received any counterfeit products. Counterfeit product and fake products are the very popular problem for the ecommerce sites in SEA countries due to its huge revenue. According to World Customs Organization, 75% of the counterfeit and fake products were manufactured in East Asia, especially China and those products are distributed around Asia (Mark, 2013). The counterfeit and fake products are appeared in many categories as electronic devices, cosmetic, clothes, food… and those products impact the authentic product brand directly by its poor quality, reducing the brand awareness of the well-known global brands. Therefore, the ecommerce sites define the counterfeit and fake product as the most dangerous factor which impact the growth of ecommerce. For instance, Lazada's parent company is Alibaba which is known as the biggest ecommerce in Asia, they launched the anti-counterfeit campaign in 2013 to take down all the counterfeit products by the cooperation with the brands, sellers, industry group and government (John, 2016). The counterfeit and fake products have the poor quality but the appearance is absolutely same with well-known global brand, that might lead the consumers to have the bad experience about the authentic brands which they have not seen before. The consumer behaviour is also changed if they received the counterfeit and fake products from ecommerce sites, their belief in the brand and ecommerce site will be decreased and they might turn back to the traditional market.

In addition, 60.2% of people said that Reasonable Prices is the main reason which leads Lazada become the biggest ecommerce site in SEA countries. In general, the product prices from ecommerce sites are always cheaper the retail market due to the cooperation between the brand

and ecommerce sites, which generate the benefit for both sides, the ecommerce sites might increase the revenue, while the well-known global brand is able to expand their business through ecommerce platform, and the shoppers can purchase the product with the good prices. The relationship is benefit for both sides, ecommerce site has two different customers as the brands and the buyers. Therefore, their responsibility is serving both of them including understanding of the consumer behaviour changes from both sides. If the ecommerce site has many type of products, it will attract the consumer to purchase the product through their website. It explained for 16.3% of the participant chose "many type of product" is the main reason which made Lazada becomes very popular nowadays. In this information age, the consumers are able to buy everything through ecommerce sites from the tiny things as a needle to the huge thing as a car. It is defined as a big advantage for ecommerce compared to traditional market, the consumers are able click and collect everything from ecommerce website into their basket and purchase in a few second with many payment methods provided, it takes more time if they purchase for each single product in the store.

Nowadays, the consumers are known as smart consumption, they have their own opinions and values, with the developing of the internet, they know the brand marketing strategy. Therefore, they do not trust in the advertising as before. The consumers only believe the information from the third party about the product review which is more reliable. It is an obvious example about the consumer behaviour changes. Understanding of this changes, the ecommerce sites provided the product return process for the consumer when they purchase the product from ecommerce site, it contributes for 92.2% of the people who said "used to return" when they were asked about the product return process after purchased. 55.3% of the produce returning due to incorrect products as wrong size, wrong model or wrong color. Obviously, to increase the customer experience and ensure that the consumers feel safe with their decision making, the ecommerce sites have to allow the product return process. The sellers might deliver the incorrect product to the shopper and ecommerce site has their own responsibility in protecting consumer in this case, it helps to build the trust on consumer base. Damaged Products is also one of the factor that the consumer have to return the product back to the seller with 16% of the people confirmed about that. Damaged products might happen due to the shipping process, especially for the cross border products which take a long way to reach out the consumer (Wan and Chen, 2018). To avoid the return product, almost of the ecommerce sites have already allowed the shopper to check the product when it reaches them.

On the other hand, with the application of the new technology innovation, many payment methods are provided to the consumer as Visa card, Paypal, ATM or Cash on delivery (COD). 66% of people chose Visa card as the main payment method which is often used by them due to its convenience. In addition, the ecommerce sites also cooperation with the banks and fintech companies to launch the special campaign as instalment purchase with low interest, money returning by using Visa card, discount… which benefit for the banks, fintech companies and ecommerce companies too. Surprisingly, the percentage of participants who chose Visa card as the payment method is higher than COD, it emphasizes that the consumer believe in using visa card and its protection as secure sockets layers (SSL) which is a process to protect the visa card user. COD payment method was just enabled in the recent years due to the cooperation between the ecommerce sites and delivery companies. Obviously, COD has a positive impact on cash circulation, the payment upon delivery might sometimes be a complexity because the consumer

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must be present physically to pay for their order. However, it becomes a good choice for the consumers who fear of fraudulent transaction from online shopping can shop carefree.

In addition, 58.2% of the participants informed that they used to have the bad experience when they purchase the products from the ecommerce sites. For more detail, 54.3% of them said long delivery time is their bad experiences, the delivery time is longer than the estimated delivery time which was provided by the ecommerce sites, and it had not reached the consumer expectation. Delivery time is the key factor in the decision to shop with an ecommerce sites, according to the study from Dotcom Distribution with 87% of 558 online shopper " Ecommerce is taking over the retail market, so brands must ensure they take advantage of the opportunity to deliver the packages that consumers expect in the most personal way" by Maria Haggerty, CEO of Dotcom Distribution. 30.4% of the participant informed that they got the bad experience with ecommerce sites due to counterfeit and fake products. The ecommerce sites and well-known global brand are trying to reduce this factor in their capacity as banning or charging penalty for sellers who sell the counterfeit or fake products. Electronic device, clothing and cosmetic are the most popular categories which have the majority of counterfeit and fake products (Siew Li Kang and Wong Ee Lin, 2018).

According to the results from the focus group discussion, there are many factors which motivate the consumer to purchase the well-known global brand product via ecommerce site when the experts were asked as conveniences of everything in one place, free shipping offer, reviews about products, reputation, price and familiarity. Surprisingly, there are two new factors here which have not been appeared in the survey as review about products and reputation.
+ Review about products: it is known as rating review. Basically, the consumers are able to post their own reviews regard to the product which they purchased before based on their used experience, those reviews help the consumers who plan to buy that kind of product have an overview about the product information whether it meets their expectation. In the opinion of the expert, reviews about the products are the good source for the new consumers, especially for purchasing the expensive goods. As a result, almost of the ecommerce sites have the review function on their website, the reviews are also collected through email as the level of satisfaction from the consumer. Obviously, the consumer behaviour has been changed through ecommerce with reviews about the products, it is an important factor which affect the consumer making decision directly.
+ Reputation: basically, the ecommerce sites often have the partnership with the well-known global brands, those global brand products are sold under official store as LazMall in Lazada ShopeeMall in Shopee or just simple as the flag stores. This selling model created a sense of safety for the consumer to purchase the item since it is sold under official stores. In the consumer's view, the reputation is factor which affects their decision making because of its safety sense when they purchase the item. With the rise of counterfeit and fake products in SEA countries, the consumers need a trustworthy platform to purchase, and the ecommerce sites have understood their expectation. As a result, the ecommerce sites keep adding the new official store from the global brands into their websites to increase the assortment and satisfies the consumer demand. They also notice that the consumer demands tend to increase day by day, more demands from the consumers due to their behaviour changes. To remain the loyal consumer, the ecommerce sites have to adapt their needs and reputation is one of them.

In the next question regard to the consumer decision making changes from the early stage of ecommerce compared to now. All experts agreed that geographical boundaries are no longer the limitation as consumers nowadays are able to purchase the product from everywhere with a simple click. According to them, it also has the negative side, as consumers have many more option to choose from before making their final purchase decision. With the advancement of the internet and information technology, consumers can search for any product on different ecommerce site easily to gain the product information and compare prices or other product specification, offers. However, in the ecommerce industry, the companies are also very proactive in personalizing the consumer experience when they shop on their sites. It can be highlighting previous purchases, recommending similar purchases, alternative product, etc. to influence the decision making process. Because of the personalization ability, consumers are explored to more product collection which are highly compatible to their preference. It might help consumer make more accurate choice. On the other side, it can also lead to additional purchase compare to the first purchase planning.

With the question relevant to the bad experience about the consumer behaviour changes which affected the growth of ecommerce. The experts informed that the consumer are no longer stick to one media nowadays, it is more challenging for the ecommerce to create the effective communication strategies to reach out their targeted consumer. The purchase strategies are also different by demographic group due to the different media preference and habits. As a result, to against with this, it is mandatory for ecommerce to understand the purchase strategy from each participant demographic group in order to reach them effectively while launching the marketing campaign or promoting for the new products.

Regarding to the question to define the most important keys for the brands if they want to expand through ecommerce channel and adapt the consumer behaviour changes. The experts highlighted three key factors as
+ Branding should be consistent across channels: even though the brand might appear in different ecommerce sites. However, the brand communication material must be consistent across platform when extending ecommerce, the consumers always expect the brand to maintain consistency across online and offline channels so that they will trust and feel comfortable purchasing the product online. In addition, the content quality also must be consistent when it is delivered to the consumer across channel.
+ Use personalized strategy: there are many ways to reach consumer nowadays and motivate their purchase decision, the brands should use and take the benefit of personalized function as personalized product recommendation or personalized newsletters. Those are the effective ways for the brand to reach out the specific potential consumer.
+ Focus on mobile ecommerce: smartphone has become an integral part of the human life, the youth generation is becoming the tech-savvy. The majority of ecommerce purchases are done through smartphone. Therefore, UX/UI play an important role in the success of brands on ecommerce site. The traffic from mobile and tablet are always higher than browsing from computer, it demonstrates that the consumer behaviour has been changed in the way they shop nowadays.

There are many factors which are contributing for the consumer behaviour change and growth of ecommerce had been called out from the survey and focus group result. In summary, the

consumer behaviour changes are the result of advancement of information technology, application of technology innovation into the real life, the rise of youth population and middle class. The consumers need more convenient channel to make their shopping experience easier. Reasonable price, convenience and trustworthiness are their expectation from the ecommerce sites and well-known global brands whenever they decide to purchase the product. Obviously, the consumers are the smart consumption generations at the moment by application of the innovation into their real life. The consumers are not just spending their money, it also included smart spending strategy.

4.4 Conclusion

The findings demonstrate the changes of consumer behaviour toward the well-known global brands under the rapid growth of ecommerce in Southeast Asia. With the rapid development of information technology and the rise of middle class, it is the base for the growth of ecommerce in SEA countries. The rise of millennial generation is also important factor which decides the success of ecommerce. Besides that, the consumers are the smart consumption nowadays, they do not believe in the advertising from the brands, they tend to find out the product information by themselves from the third parties which have the obvious review relevant to the particular product. On the other hand, the consumer shopping habit is also changed by many ways. They have more options to choose the payment methods as before because they know their values exactly. As a result, the brands must understand those changes to adjust the product and service to adapt the changes. In general, the relationship between ecommerce and well-known global brand is multi-side which help to generate the benefit for both sides, consumer is the target audience for both sides. The consumers have more requirements related to delivery, customer service, promotion, website content which might make their life more convenient and easier.

Last but not least, it is a challenge for the ecommerce sites and well-known global brand to ensure that the consumers are provided the best quality product and service. A majority of the consumers aim getting value for their money whenever they purchase the onsite products. Consumer satisfaction contributes an important factor to keep the consumer as the loyal consumer for any brands. Therefore, if the brands understand the consumer better than their competition then they have the greater chance of winning. Understanding of consumer behaviour changes and the factors which lead the changes is the key successful factor for any ecommerce site and well-known global brands in this information era.

5 Concluding thoughts on the contribution of the research, its limitation and suggestions for further research.

5.1 Implication of findings for the research questions

In general, the findings have obvious implication of the research question, especially for the main research question "what is the potential key factors which affect the changes of consumer behaviour and their purchasable decision ?" as the result from finding, the consumer behaviour are affected by many different factors as product price, customer service, delivery service, counterfeit and fake product. Therefore, the ecommerce sites and well-known global brand must to understand the customer expectation to improve their service and satisfy the consumer. The shoppers might become the loyal consumers if they trust in the brands which provided them the good product quality with reasonable price.

In addition, according to the results of this research, the ecommerce shoppers in Southeast Asia have a strong understanding on the well-known global brands. They might search for the product information from the third party to ensure it is the fair review before the decision making. Beside that the shoppers also look for the global brand products from different ecommerce sites to compare the product price and service. Nowadays the consumers become the smart consumption who are able to use the advancement of internet to find out the useful product information. They do not trust in the advertising as before, and tend to trust in the people who already used that products. It is the big challenge for the well-known global brand, beside the marketing strategy, they have to find out the consumer expectation relevant to the product and adjust it to satisfy the consumer expectation.

Moreover, the consumes in Southeast Asia are different about the culture, religion, language. However, they have the same shopping habit as focusing on the reasonable price, the good product quality, the customer service and the convenience from the ecommerce sites, the more convenient from ecommerce the more revenue is generated by the loyal consumer. The unique selling proposition is the main factor which help the ecommerce site and well-known global brand increase the selling rate. Basically, unique selling proposition is the factor or consideration which are offered by the seller as the reason that the product or service is different and better than their competition.

The findings demonstrate that the consumer behaviour changes are happening on the daily basis. The consumers have more demands from the ecommerce sites and well-known global brands to make their decision making more accurate and optimal. In order to increase the purchasable rate from the loyal and potential consumers, the ecommerce sites and global brands must become more involved within the consumer behaviour. In order to fully align with the consumers especially Millennial interests, the ecommerce companies and well-known global brand might consider to develop more value for unique selling proposition to adapt the consumer behaviour changes and stand out of the competitors. Besides that, the growth of ecommerce in SEA countries are completely depended on the purchasable rate from the consumers. Therefore, the ecommerce companies and global brands must keep building the cooperation to create more effective marketing campaigns with consumer behaviour is the core base.

5.2. Contribution and limitation of the research

The research is exploratory in the consumer behaviour changes and the growth of ecommerce in SEA countries. Therefore, there are also limits to the number of participant for the survey, since the author is living aboard.

There are limits in the research at some of the questions which were quite complex and require the participants are familiar with the ecommerce process as ordering, receiving and returning the product. This might create the confusion for the participant when they answered the survey. Since the research is based on the sensory and shopping habit which may lead to some inaccurate answers from the participants. Language barrier is also the limitation for the author to have more responses from the SEA countries with the local languages as Thai, Indo Bahasa where English is not popular for the participants.

In addition, the author planned to interview the experts in the focus group via Skype. However, those experts are on business trip and holiday. Therefore, the author had to send the questionnaire list to the experts and received the answered list by email. This limited the content of the interview which could be expand during the conversation.

5.3. Recommendation for practice

To understand the changes of consumer behaviour and the growth of ecommerce in SEA countries which are very complex and changed quickly. The author recommends to live in the SEA countries, especially in Singapore which is the headquarter of many big ecommerce sites and well-known global brands. Trying to purchase the different products from different ecommerce sites to evaluate the SWOT of each ecommerce site, global brand and understanding the purchasing process, how it impacts on the consumer behaviour and lead the consumer to change their shopping habits.

For the interview with the experts in the focus group, it is recommended to be conducted as face to face meeting, it helps to expand more information during the discussion, instead of communicate through email. For the survey, it is recommended to include all the local languages as Thai, Indo Bahasa, Malay Bahasa and Cantonese which help to reach out more participants in ASEAN who cannot use English.

In addition, following the biggest campaigns from the ecommerce sites and well-known global brands in 11/11 and 12/12 is also the best way to understand the relationship between the ecommerce and the brands, also the way how they impact the consumers to motivate them to purchase the product during those campaigns.

5.4 Recommendation for further research

This research focused solely on the consumer behaviour changes and ecommerce field in Southeast Asia with six countries as Vietnam, Malaysia, Vietnam, Singapore, Thailand, Indonesia and Philippine. Further exploration needs to include more countries as Laos, Myanmar and Brunei, the comparison of the growth of ecommerce and consumer behaviour might become

more accurate. The infrastructure and information technology are developing differently in southeast Asia countries. Therefore, adding more countries is the good way to call out the complete answer for the consumer behaviour changes.

The questionnaire list should be more open-ended and deep interview with focus group must be considered to get more detailed and specific responses. The deep interview also has the potential chance to bridge the gap in literature review part. By providing the examples and explanations to the participants, the objective of the question might be stated clearer which causes more accurate and valid responses.

5.5 Final conclusion and reflections

The conclusion of this study is to identify the factors which affected the consumer behaviour changes toward the well-known global brands under the rapid growth of ecommerce in Southeast Asia. Obviously, Southeast Asia is the potential market compared to the region to invest and increase the market share. However, it is also the active and dynamic market which require the players have a strong understanding of this unique market. As a result, the outcome of this study helps marketers to understand completely the SEA market and provide more information needed for the well-known global brands to get an insight on consumer's purchase behaviour through ecommerce, there is also a chance for launching or building a new ecommerce site or global band product.

From the author side, this study is an opportunity to enhance the knowledge with interesting topic and offer the author a chance to explore the dynamic market in SEA where the author will return to work in future after studying in Europe.

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Appendices

Appendix A – Survey Questionnaire design

1
Which rage age are you in?

A – 15-24
B – 25-34
C – 35-44
D – 45-54
E – 55+

2
Do you often do online shopping ?
if yes, circle the category which you often purchase via ecommerce website

A – Cosmetics
B – Electronic devices
C – Fashion products
D – Books
E – Other_____

3
What make you choose online shopping instead of offline shopping?

A-   Good Price
B-   Convenience
C-   Customer Service after purchasing
D-   Afraid of counterfeit product
E-   Other_____

4
Have you ever received the counterfeit/fake products from online shopping?
If yes, Give out your opinion about that counterfeit/fake products and where did you buy it?

A-   Yes ____
B-   No

5
Do you know that Lazada is the biggest ecommerce website in Southeast Asia, list down the reason you think Lazada has that position ?

A-   Reasonable Product Price
B-   Good Product Quality
C-   Fast Delivery Service

D-   Good Customer Service
E-   User interface/ user experience
F-   Good website content quality
G-   Many types of Product
H-   Other___

6
Lazada , Shoppee, Tiki, Tokipedia, 11street are the popular ecommerce sites in SEA. Which website do you often do online shopping ? why do you choose it ?

7
Do you often return the purchased products back to the seller ?
 if yes, what are the usual reasons ?

A-   Incorrect products: wrong model, colour, size
B-   Damaged products
C-   Long delivery time
D-   Counterfeit or fake product
E-   Other___

8
Which payment method do you often choose?

A – Visa Card
B – Cash on delivery

9
When do you often do online shopping ?

A-   First week of the month
B-   In the middle of the month
C-   End of month
D-   Anytime

10
Do you have any bad experience with delivery service ? if yes, please provide

11
In your opinion, can you please provide which part the ecommerce site and well-known global brand must adjust to satisfy the shopper ?

A-   More promotions for shopper
B-   Better customer service
C-   Website/ application interface
D-   Others_____

12
Do you often buy the product which is recommended by your friend, relatives or influencer ?

A-   Yes
B-   No

Questionnaire for the focus group:

Number	Question
1	In your opinion, what is the most important factors which motivate the consumer to purchase the well-known global brands through e-commerce site, why ?
2	How the consumer decision making changes from the early stage of ecommerce compared to now ?
3	In your experience, Can you please provide some bad experiences about the consumer behavior changes which affected the growth of ecommerce directly and indirectly, and how did you deal with those cases ?
4	What are the most important keys for the brands if they would like to expand through ecommerce channel with the effects of consumer behavior changes ?
5	Some people said "Ecommerce will destroy the traditional market and the local brands because of their strong understanding of consumer behaviour" what do you think about that review ? please explain in detail.

Appendix B Alibaba group financial report in 2018

ALIBABA GROUP HOLDING LIMITED
UNAUDITED CONSOLIDATED INCOME STATEMENTS

	Three months ended March 31,			Year ended March 31,		
	2017	2018		2017	2018	
	RMB	RMB	US$	RMB	RMB	US$
	(in millions, except per share data)			(in millions, except per share data)		
Revenue	38,579	61,932	9,873	158,273	250,266	39,898
Cost of revenue	(15,490)	(32,504)	(5,182)	(59,483)	(107,044)	(17,065)
Product development expenses	(4,518)	(6,686)	(1,066)	(17,060)	(22,754)	(3,628)
Sales and marketing expenses	(4,332)	(7,641)	(1,218)	(16,314)	(27,299)	(4,352)
General and administrative expenses	(3,394)	(4,551)	(725)	(12,239)	(16,241)	(2,589)
Amortization of intangible assets	(1,313)	(1,329)	(212)	(5,122)	(7,120)	(1,135)
Impairment of goodwill	—	—	—	—	(494)	(79)
Income from operations	9,532	9,221	1,470	48,055	69,314	11,050
Interest and investment income, net	6,553	1,945	310	8,559	30,495	4,862
Interest expense	(676)	(1,175)	(187)	(2,671)	(3,566)	(568)
Other income, net	440	884	141	6,086	4,160	663
Income before income tax and share of results of equity investees	15,849	10,875	1,734	60,029	100,403	16,007
Income tax expenses	(4,553)	(4,164)	(664)	(13,776)	(18,199)	(2,901)
Share of results of equity investees	(1,444)	(70)	(11)	(5,027)	(20,792)	(3,315)
Net income	9,852	6,641	1,059	41,226	61,412	9,791
Net loss attributable to noncontrolling interests	795	1,028	164	2,449	2,681	427
Net income attributable to Alibaba Group Holding Limited	10,647	7,669	1,223	43,675	64,093	10,218
Accretion of mezzanine equity	—	(108)	(17)	—	(108)	(17)
Net income attributable to ordinary shareholders	10,647	7,561	1,206	43,675	63,985	10,201
Earnings per share attributable to ordinary shareholders						
Basic	4.24	2.95	0.47	17.52	25.06	4.00
Diluted	4.12	2.88	0.46	16.97	24.51	3.91
Weighted average number of share used in calculating net income per ordinary share						
Basic	2,513	2,560		2,493	2,553	
Diluted	2,581	2,619		2,573	2,610	