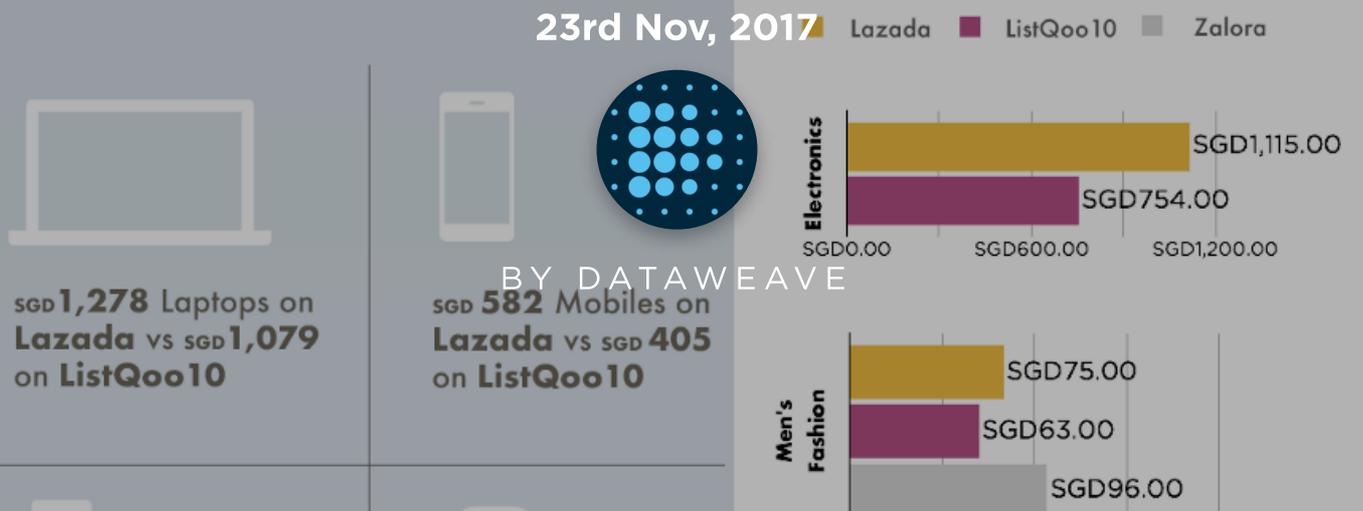


# Under the Microscope: Lazada's 11.11 Online Revolution Sale



Lazada's signature event, Online Revolution, is a month-long sale extravaganza that commenced with a Mega Sale on 11 November, and culminates in an End-Of-Year sale on 12 December. The shopping event is held across six southeast Asian countries – Singapore, Malaysia, Thailand, Indonesia, the Philippines and Vietnam – making it the region's biggest retail event.

Lazada Group's chief executive officer Maximilian Bittner observed, "We aim to provide Southeast Asia's rapidly growing middle-class the access to a wide range of products with deals and discounts that were previously available only abroad or in the capital cities."

On 11.11, the first Mega Sale, shoppers took advantage of great deals, ordering 6.5 million items (nearly doubling last year's tally), resulting in sales of US\$123m, annihilating last year's takings by a whopping 191 percent.

At DataWeave, our proprietary data aggregation and analysis platform enabled us to seamlessly analyze and compare Lazada's discounts during 11.11 with those of its competitors. We focussed specifically on two markets – Singapore and Indonesia. While the sale itself is Lazada's, we looked at its immediate competitors as well, to study how competitively they position themselves during Lazada's sale.

For our analysis, we aggregated pricing information on the Top 500 ranked products of over 20 product types on each website, spread across Electronics

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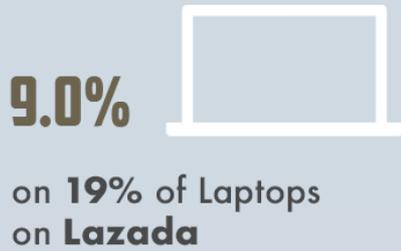
and Fashion, covering over 120,000 products in total.

### **11.11 — Singapore**

In our analysis, we scrutinized the additional discounts offered by Lazada, ListQoo10, and Zalora during the sale period, compared to prices leading up to the sale. As today's shoppers often encounter deep discounts on several products even on normal days, our analysis of additional discounts offered during the sale more accurately reflects the true value of the sale event to shoppers.

In the following infographic, all prices are in Singapore Dollars, and additional discounts are the percentage reduction in price on 11.11 compared to 10.11.

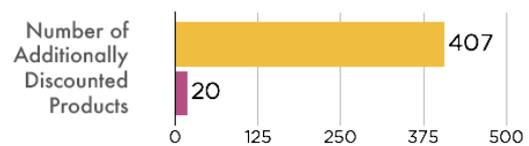
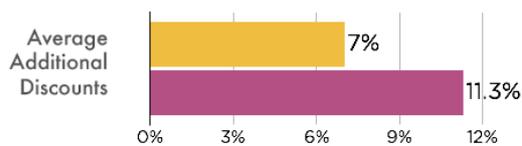
ONLINE REVOLUTION  
**SINGAPORE**  
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Average Additional  
 Discounts During 11.11

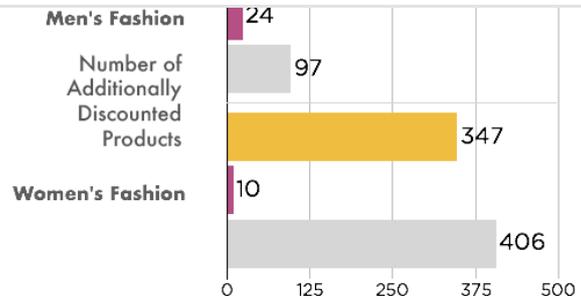
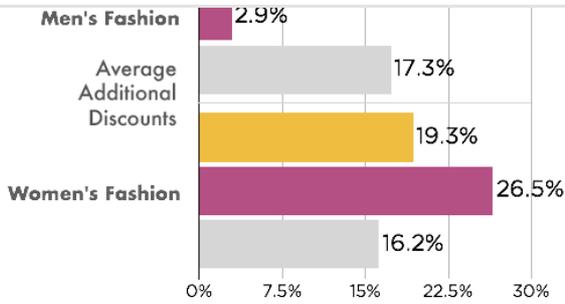


**Electronics** ■ Lazada ■ ListQoo10



**Men's & Women's Fashion** ■ Lazada ■ ListQoo10 ■ Zalora





## Average Selling Price on 11.11



sgd **1,278** Laptops on **Lazada** vs sgd **1,079** on **ListQoo10**



sgd **582** Mobiles on **Lazada** vs sgd **405** on **ListQoo10**



sgd **334** Women's Watches on **Zalora** vs sgd **124** on **Lazada**



sgd **415** Handbags on **ListQoo10** vs sgd **118** on **Lazada**

## Average Selling Price



## Top Brands Offering Additional Discounts on Lazada

**45.7%**  
on 40% of Dockers Men's Shirts

**11.4%**  
on 52% of ZK Skirts

**9.8%**  
on 29% of Adidas Men's Shoes

**8.3%**  
on 8% of Canon DSLR Cameras

**7.5%**  
on 19% of Xiaomi Mobile Phones

**7.0%**  
on 26% of Samsung TVs

**6.8%**  
on 42% of Acer Laptops

**6.6%**  
on 25% of Seiko Watches

## Top Brands Offerina

## Additional Discounts on Zalora

**Mango**

24.4%  
on 54% of Skirts

&

23.0%  
on 60% of Women's T-shirts

**Dorothy Perkins**

13.3%  
on 50% of Women's T-shirts

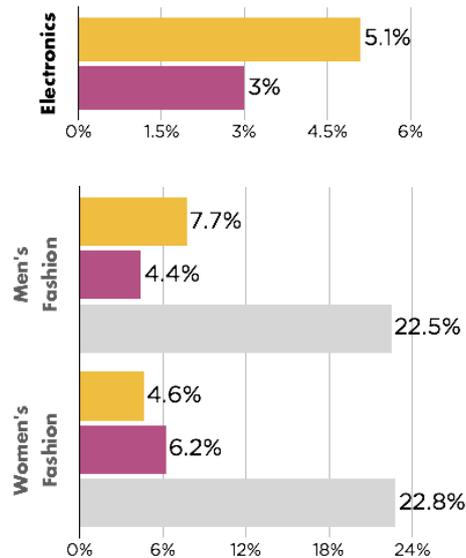
&

12.9%  
on 51% of Skirts

### New Products in the Top 500 Ranks of Each Product Type

Percentage of New Products

■ Lazada ■ ListQoo10 ■ Zalora



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Lazada's discounting strategy was more focused on Fashion rather than Electronics. However, Lazada didn't have it all its own way with Zalora providing comparably high discounts, enabling it to compete effectively, especially in Women's Fashion (16.2 percent on 406 products).

Zalora actually exceeded Lazada in the number of additionally discounted products on offer (Zalora 406, Lazada 347). ListQoo10 did not match either Lazada or Zalora's level of discounting.

While Lazada held a more premium, high-value product mix in Electronics compared to ListQoo10, it chose to target the more affordable segment in Fashion, with both ListQoo10 and Zalora displaying a higher average selling price in each category.

Interestingly, Lazada refreshed very few of its Top 500 products during the sale, limiting new options to choose from for its shoppers. On the other hand,

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Zalora refreshed 22.5 and 22.8 percent of its products in men's and women's fashion respectively.

### **11.11 – Indonesia**

Using a similar methodology to our Singapore analysis, we analyzed Lazada's promotions against Blibli and Zalora, three of the top eCommerce websites in the region. In the following infographic, all currencies are in Indonesian Rupiah.

ONLINE REVOLUTION  
**INDONESIA**  
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**11.1%**



on **5%** of DSLR Cameras on **Lazada**

**20.8%**



on **21%** of Jeans on **Lazada**

**21.4%**



on **43%** of Women's Shoes on **Lazada**

Average Additional Discounts During 11.11



**4.7%**

on **8%** of Mobile Phones on **Blibli**

**25.1%**



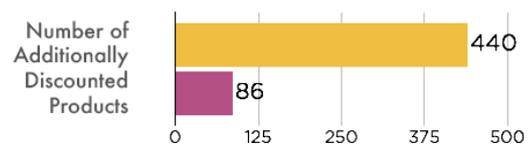
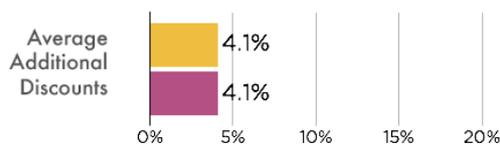
on **8%** of Skirts on **Zalora**

**19.3%**



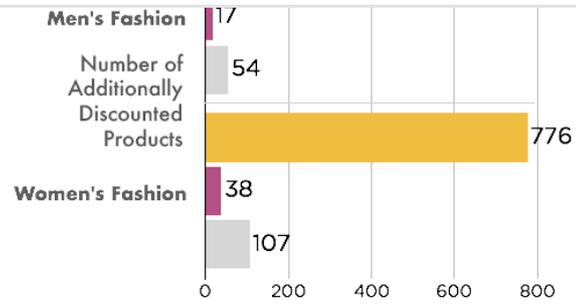
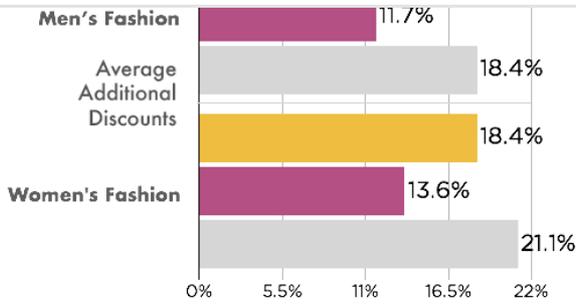
on **14%** of Women's T-shirts on **Zalora**

**Electronics**    ■ Lazada    ■ Blibli



**Men's & Women's Fashion**    ■ Lazada    ■ Blibli    ■ Zalora





## Average Selling Price on 11.11



IDR **9,016,506** Laptops on **Lazada** vs  
IDR **8,115,826** on **Blibli**



IDR **18,567,523** DSLR Cameras on **Blibli**  
vs IDR **5,775,822** on **Lazada**



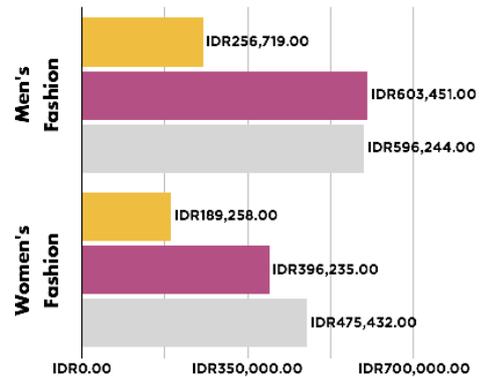
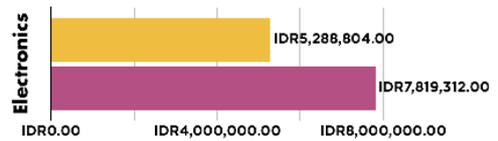
IDR **1,019,936** Women's Watches on **Zalora**  
vs IDR **477,859** on **Lazada**



IDR **633,701** Handbags on **Blibli**  
vs IDR **253,987** on **Lazada**

## Average Selling Price

Legend: Lazada (Yellow), Blibli (Purple), Zalora (Grey)



## Top Brands Offering Additional Discounts on Lazada

**14.0%**  
on 22% of Fossil Watches

**12.8%**  
on 32% of T A S Handbags

**3.0%**  
on 35% of Samsung Mobile Phones

## Top Brands Offering Additional Discounts on Blibli

**5.5%**

**3.1%**

**2.8%**

on 38% of Xiaomi Mobile Phones

on 21% of Asus Laptops

on 25% of Samsung Mobile Phones

## Top Brands Offering Additional Discounts on Zalora

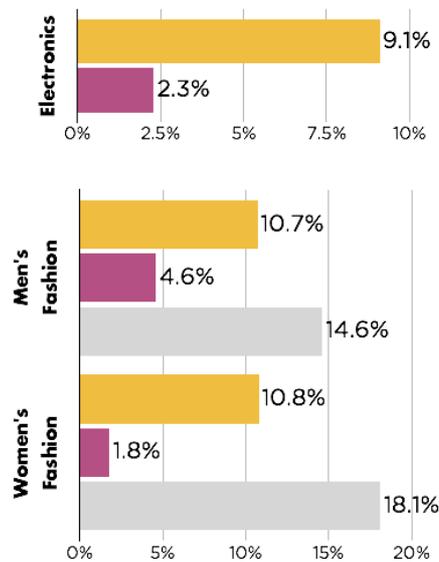
12.2%  
on 34% of Adidas Men's Shoes

15.1%  
on 52% of DC Men's T-shirts

### New Products in the Top 500 Ranks of Each Product Type

Percentage of New Products

Lazada Blibli Zalora



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As with its Singapore strategy, Lazada targeted Fashion as the lead category for discounts in Indonesia. It offered steep discounts in both Men's and Women's Fashion (around 18 percent in each) across a large number of products (550 and 776 respectively). While Zalora matched and occasionally exceeded the discounts offered by Lazada, it did so across a significantly smaller range of additionally discounted products.

Surprisingly, Electronics were de-emphasised in Indonesia (4.1 percent compared to 9 percent in Singapore).

Compared to the market leaders Lazada and Zalora, Blibli struggled to be competitive from both an absolute discount level and a product assortment perspective.

Like in Singapore, Lazada looked to be targeting the affordable value end of the product mix spectrum across all categories, and introduced very few new products in its Top 500 ranks.

Zalora had a healthier churn rate of 14.6 percent and 18.1 percent in Men's and Women's Fashion, compared to Lazada's 9.1 percent (Electronics), 10.7 percent (Men's Fashion) and 10.8 percent (Women's Fashion).

### **It's Not Just About Discounts**

Lazada's 'Fashion First' targeting strategy creates an effective tie-in to its broader model of surfing the convergence wave between entertainment and eCommerce, something unique to southeast Asia.

Together with sumptuously attractive discounts, major sale events in South East Asia are fast becoming characterized by entertainment. By launching Southeast Asia's first star-studded eCommerce TV show, Lazada continues to be the region's eCommerce innovator, following in the footsteps of its pioneering parent company, Alibaba.

While time will tell how effective Lazada's strategy ultimately proves to be, together with Alibaba, it has set up a fascinating and uniquely Asian retail sale model. No doubt another milestone will be set on 12.12 when the Online Revolution Mega Sale returns with even greater deals. At [DataWeave](#), we'll be sure to analyze that sale as well and bring you all its highlights.

#### **- [DataWeave Marketing](#)**

**23rd Nov, 2017**

AMAZON

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