

Live Commerce Landscape in Philippines



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Methodology

The purpose of this study is to understand the current state of livestreaming landscape, the consumers' behaviour and the role Business Messaging plays in driving sales

The survey is conducted using an online questionnaire, scripted and managed by Decision Lab's surveying and data management platform, with specifications:

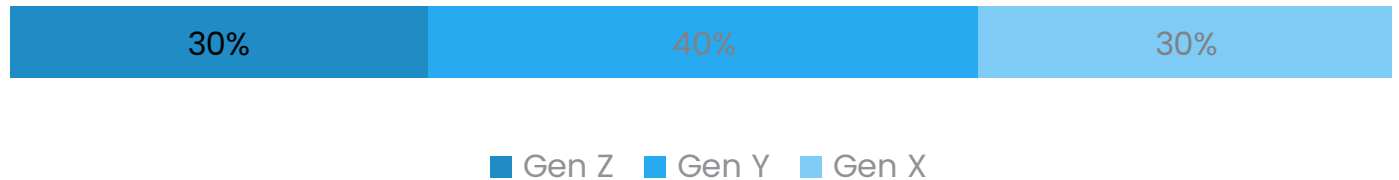
- Sample size: n = 701
- Data collection period: 14 – 29/12/2023
- Target audience: Have the habit of watching livestream on social media and do online shopping

Total sample achieved (n=701)

Gender



Generation



Island group



Section summary

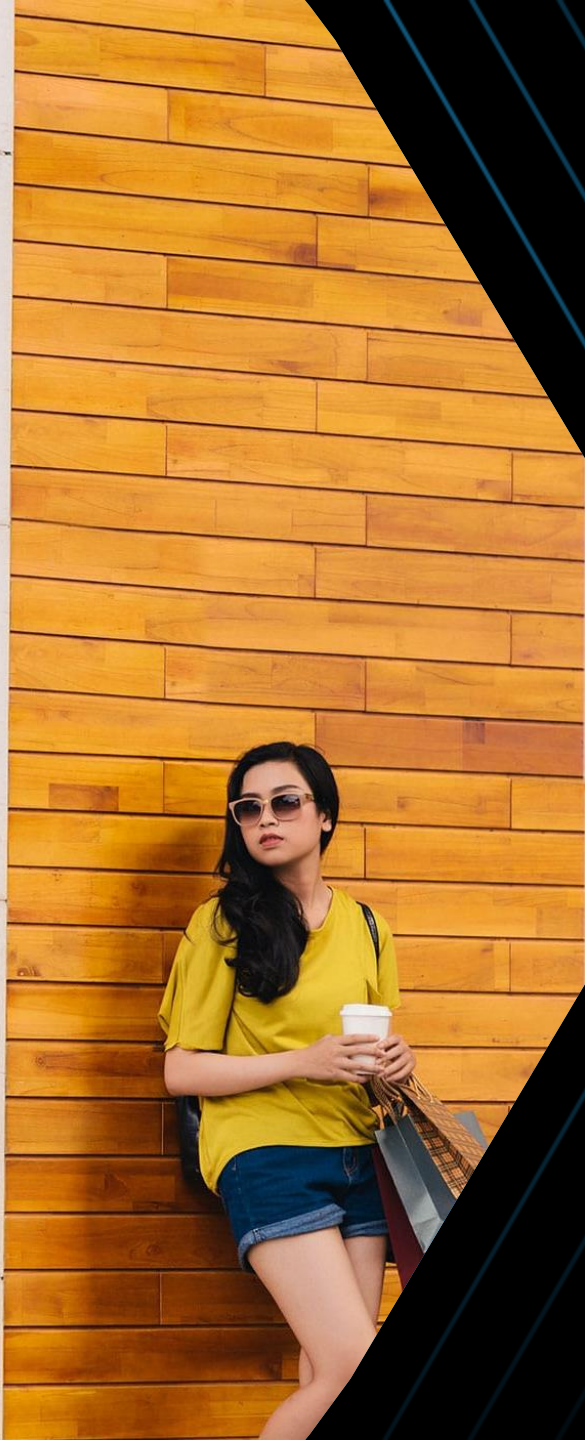
Livestreaming has surged into **the top 2 channels for new brands to reach consumers**. Watching Livestream is becoming a habit with 80% people watching at least once a week. With its engaging and interactive content, 79% of people spend at least half an hour to watch livestream. Brands can leverage this channel to build meaningful connection and loyalty with consumers.

Livestream is an **effective sales channel** with 64% people have watched livestream for shopping and 51% of them having made a purchase via live shopping. People are **highly likely to repeat their purchase** on livestream and once they repurchased, the next order tend to have higher value.

Facebook is the **most popular platform to watch livestream** for shopping in Philippines. **Messaging** is a preferred way for Live shoppers **to connect to brands** throughout discovery, purchase and post purchase phases. Live selling brands can leverage this communication channel to build brand trust, accelerate sales and gain loyalty

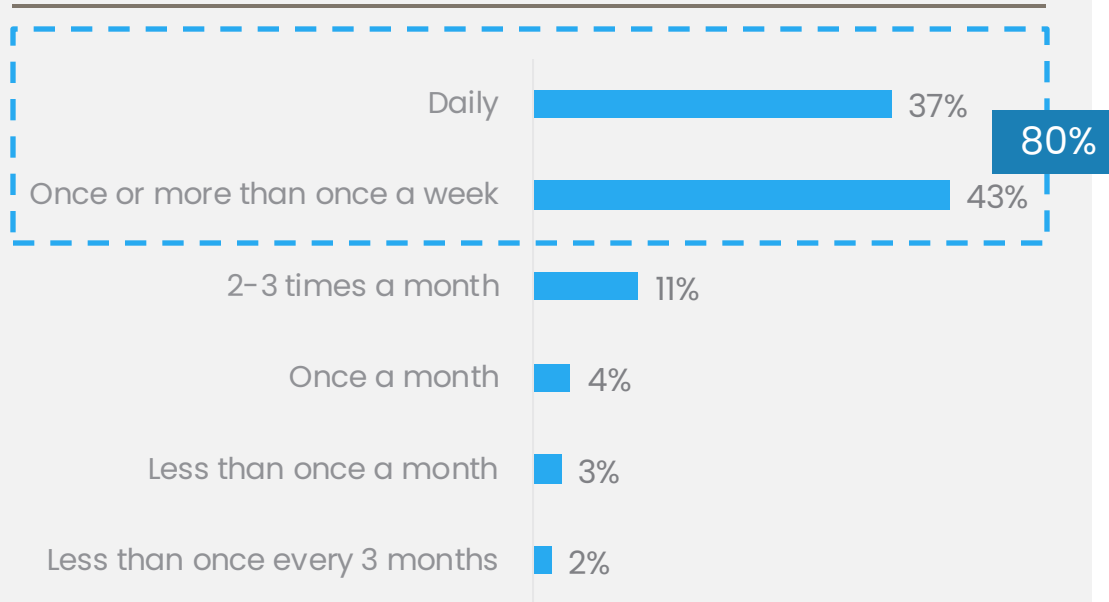
General livestreaming behaviour

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Watching livestream becomes a routine activity with 80% people watching at least once a week. 79% of people spend at least half an hour to watch livestream thanks to its engaging content. Brands can leverage this channel to build meaningful connection and loyalty with consumers

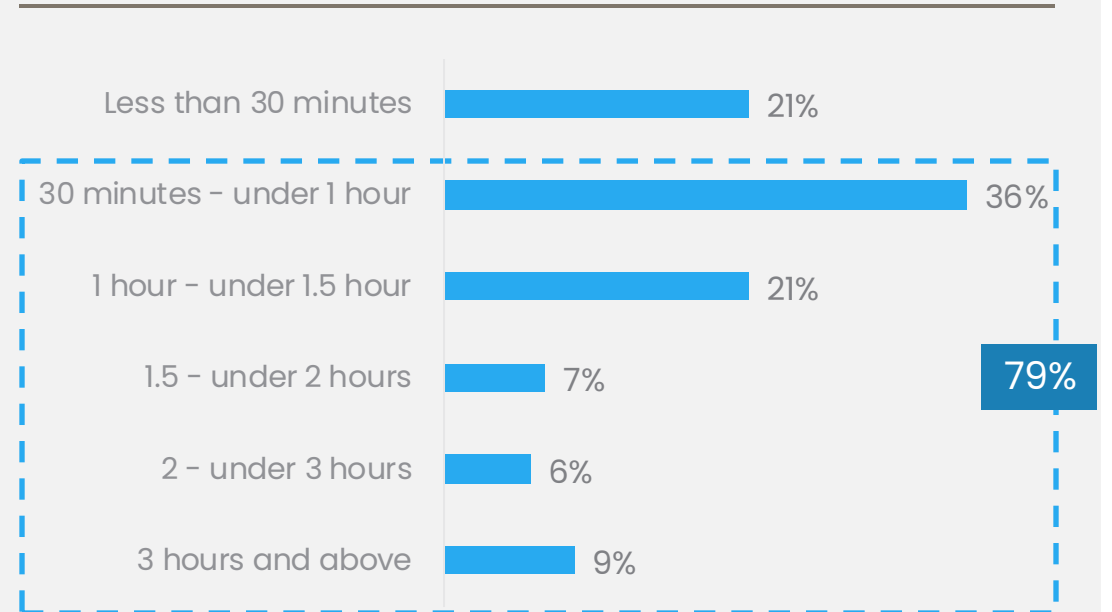
Frequency of watching livestream



How often do you watch livestream?

n=701

Duration of watching livestream

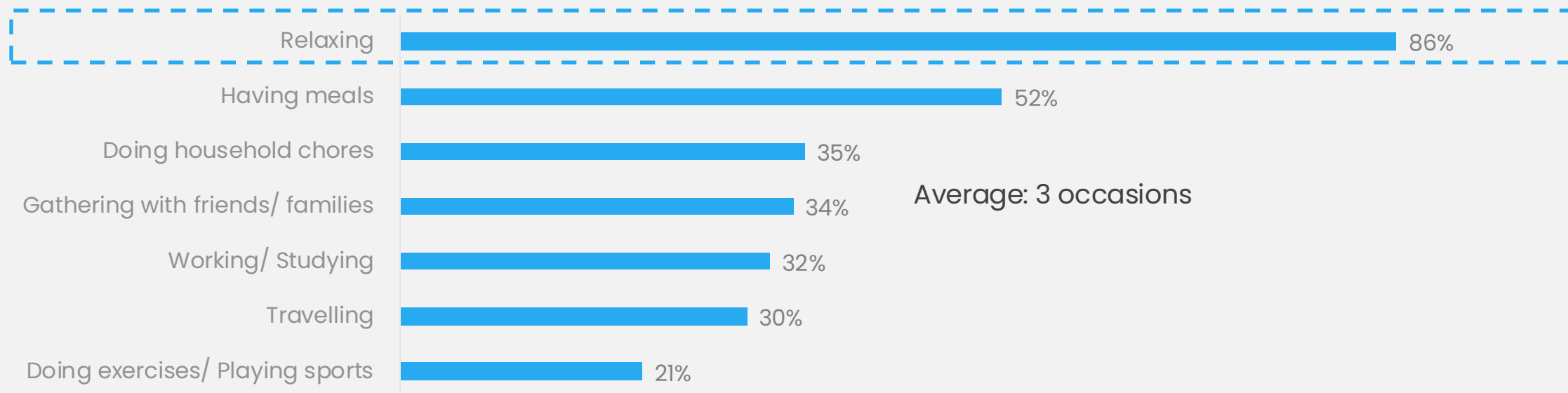


How long do you watch a livestream for?

n=701

Livestream's seamless integration into daily life offers unique opportunities for brands to connect directly with consumers. Diversifying content and scheduling livestreams to align with those moments is key to maximizing engagement. Since 86% of viewers tune in while relaxing, brands should leverage entertainment and deals to boost impulse purchases

Occasion to watch livestream



On which occasions do you watch livestream?

n=701



Deep-dive into livestream for shopping

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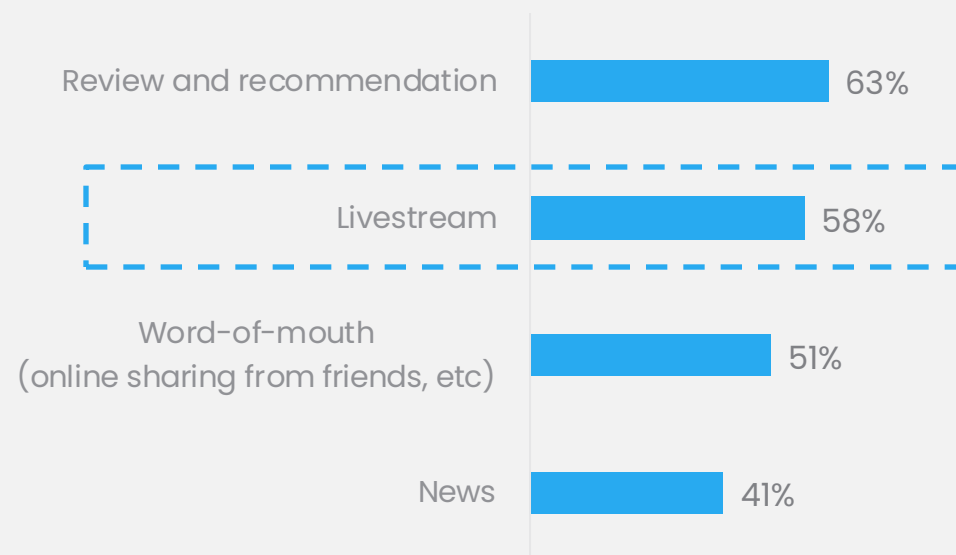


Purchase from livestreaming

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Livestream is the 2nd popular platforms in introducing new brands to the market with 42% of the audience find the new ones introduced via this method more and much more trustworthy. Brands can leverage this channel for new user acquisition and brand trust

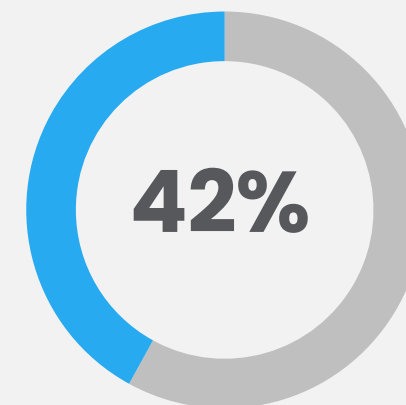
Discovery of new brands



How do you usually discover new brands on online platforms?

n=701

Trustworthiness level of brands discovered by livestream



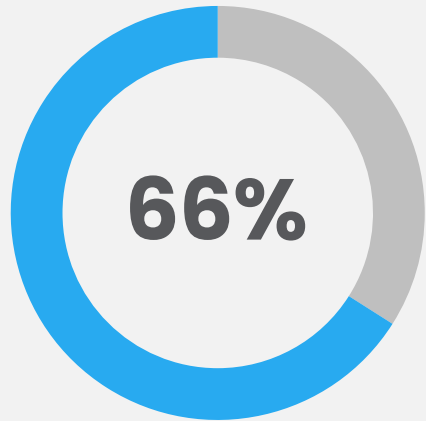
More or much more trustworthy

On a scale of 1-5, please rate the level of trustworthiness of new brands after watching their livestream

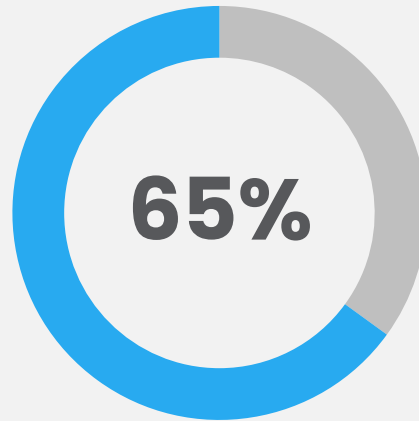
n=701

Feedback verification, Product authenticity and Information transparency are considered the key motivations for trustworthiness. Thus, preparing a plot that allocate time to provide product details, clarify purchase T&C, return policies are critical to build trust for livestreaming brands

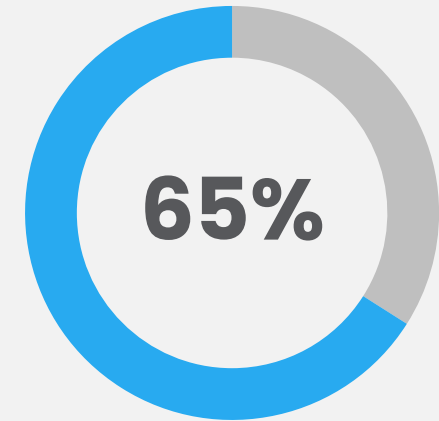
Drivers to trust new brands in livestream



Real-time interaction



Product authenticity



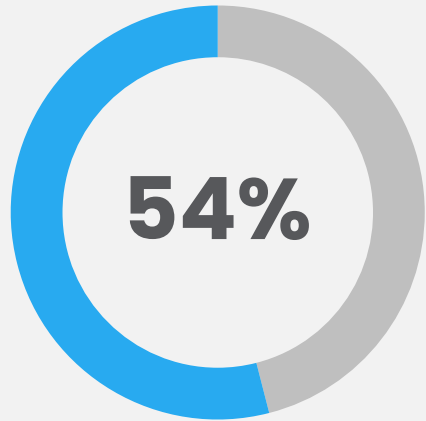
Information transparency

What factors do you think that contribute to the TRUSTWORTHINESS of the new brands being live streamed? (Select up to 5 options)

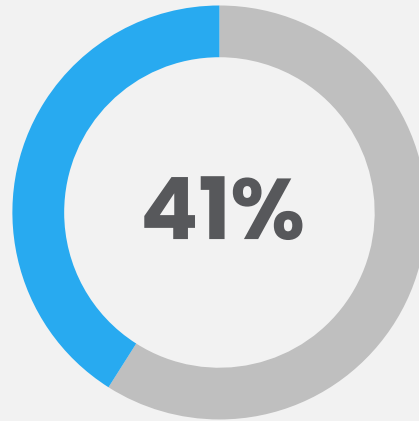
n=296

With the need to access personalized consultation, consumers expect trustworthy brands to respond in real time, provide one-on-one engagement via private messaging. Brands can leverage this channel to build a safe space for meaningful connection with consumers

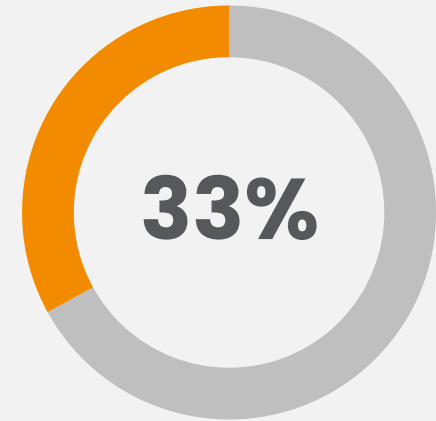
Drivers and barriers to trust new brands in livestream



Respondents attribute **real-time interaction (addressing concerns from consumers quickly)** as key driver for livestreaming brand' trustworthiness (n=296)



Respondents attribute **Message for one-on-one consultation** as key driver for livestreaming brand' trustworthiness (n=296)



Respondents consider **inability to message brands for one-on-one consultation** a barrier to trust (n=51)

What factors do you think that contribute to the TRUSTWORTHINESS of the new brands being livestreamed? (Select up to 5 options)
Why do you consider new brands you find on a livestream LESS TRUSTWORTHY? (Select up to 5 options)

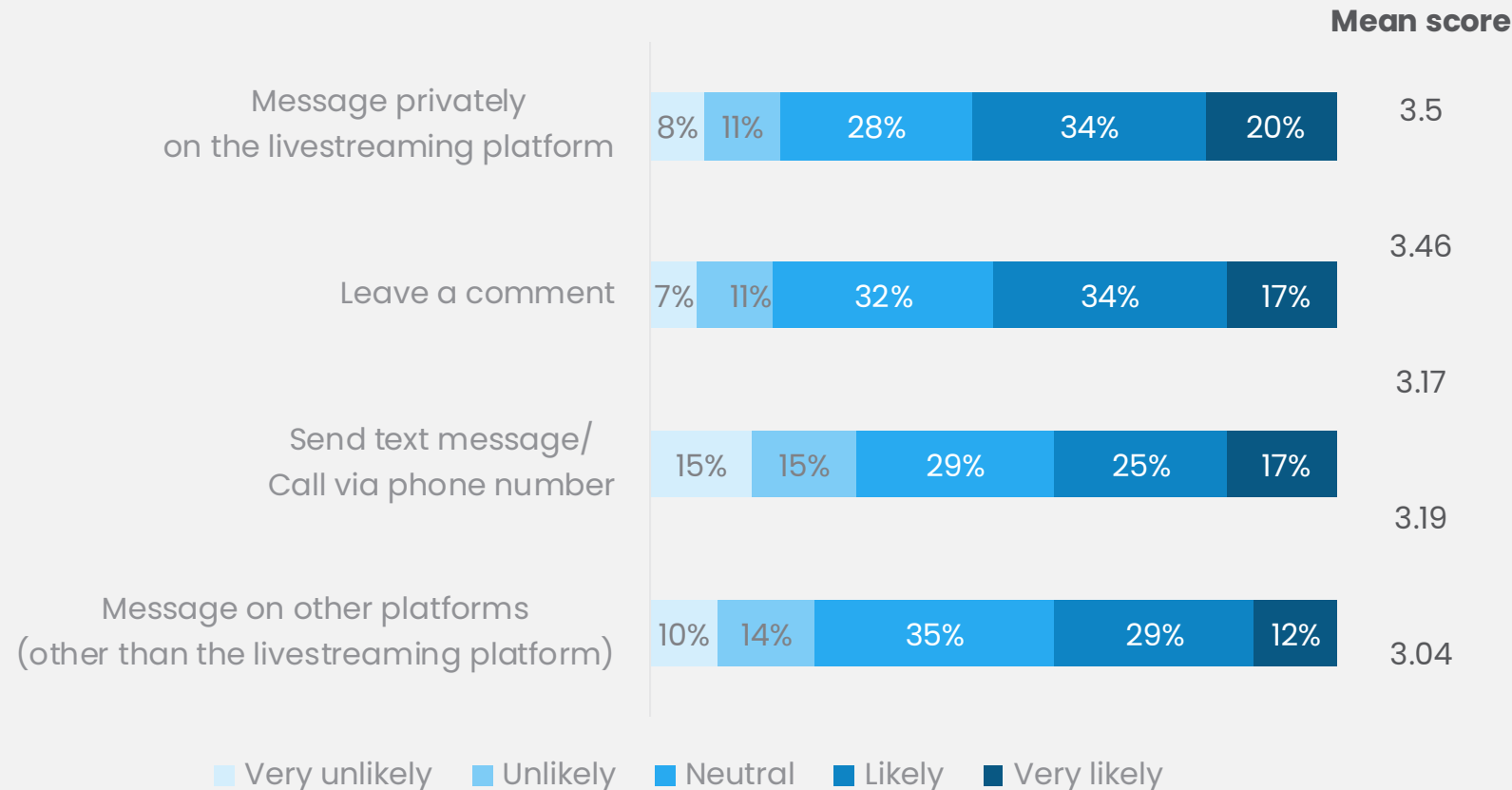
n=296

Experience from purchasing from livestreaming

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Methods to contact in livestreams



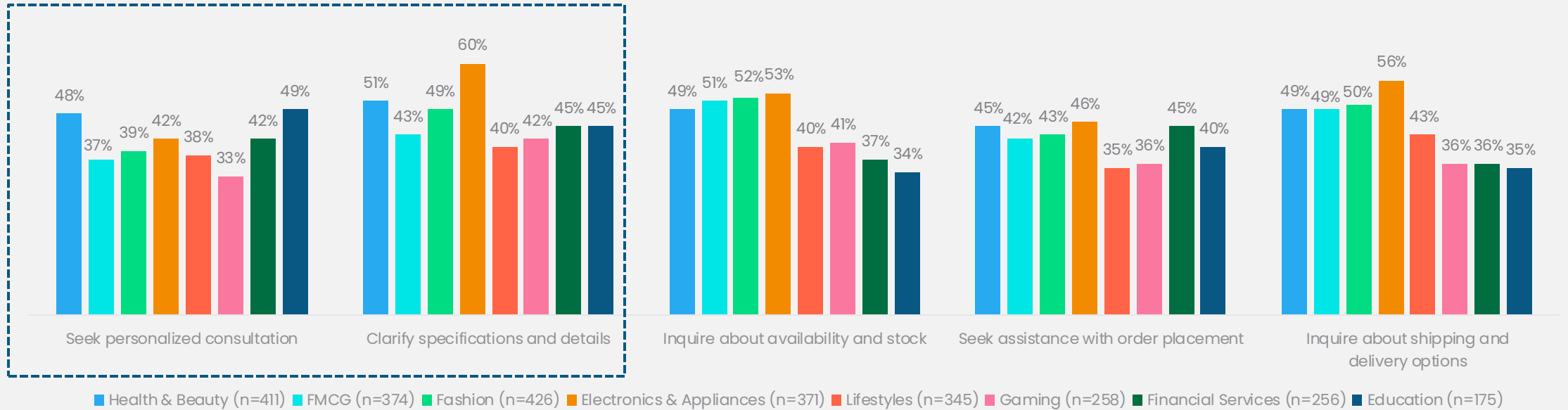
Please rank the likelihood you would use the following methods to get in touch with the seller/ brand DURING the livestream

n=701

Private messaging is the most likely way for consumers to contact brands during livestream

Across verticals, people use one-to-one messaging to contact to brands for diverse inquiries. Consumers of Financial services tend to message to access personalized consultation while Health & Beauty and Electronics buyers demand information about product/ service clarification

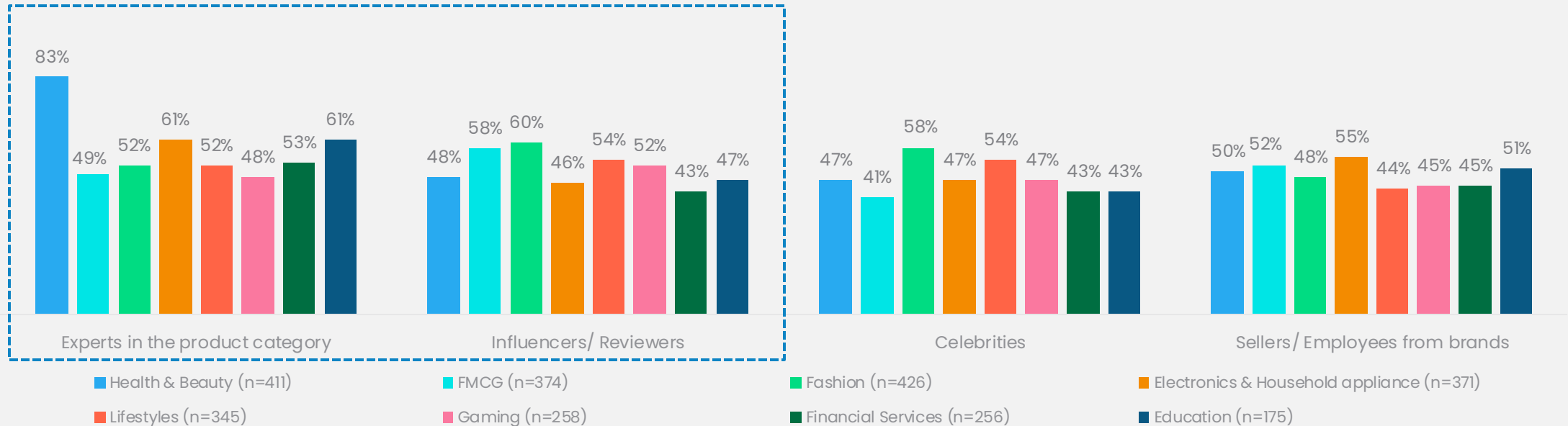
Reasons to message in each category



What would be the reasons for you to send a message to inquire about the products/ services of each categories DURING a livestream?

Consumers have diverse preference for livestreaming host profiles, suggesting brands to select appropriate hosts for each topics and business goals. Experts are favoured by consumers of Health & Beauty while FMCG and Fashion category is skewed towards influencers/reviewers

Preferred host for livestream in each category



Who do you prefer to be the HOST of the livestream for each product category?

Apart from information and professionalism, a host having good reputation is also attractive to Filipino livestream viewers

71%

Value the host being informative

61%

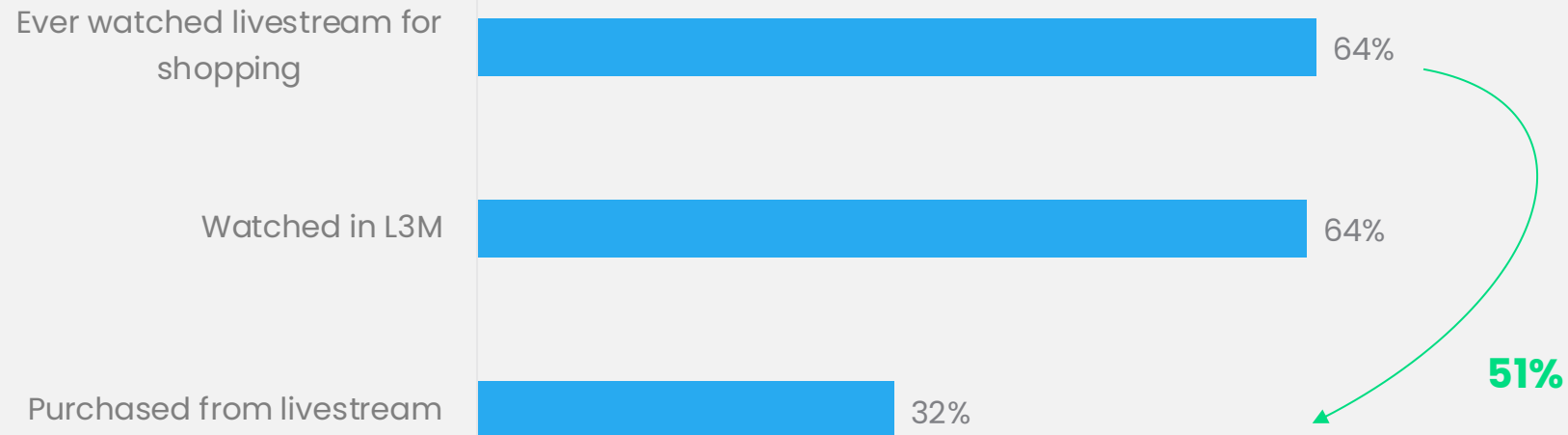
Value the host's professionalism

60%

Value the host's good reputation

Livestream positions itself as an effective sales channel. 64% people have watched livestream for shopping and 51% of them having made an order via this platform

Viewership and Conversion from viewership to purchase from livestream



What types of livestream content do you often watch? Which platform have you WATCHED in a livestream for shopping from for each of the below categories in the LAST 3 MONTHS? Which shopping mode have you used when shopping online?

n=701

Good experience in messaging with brands is among top 4 key drivers to purchase via livestream, suggesting opportunities for brands to build seamless messaging experience to capture purchase intent

Drivers to purchase via livestream

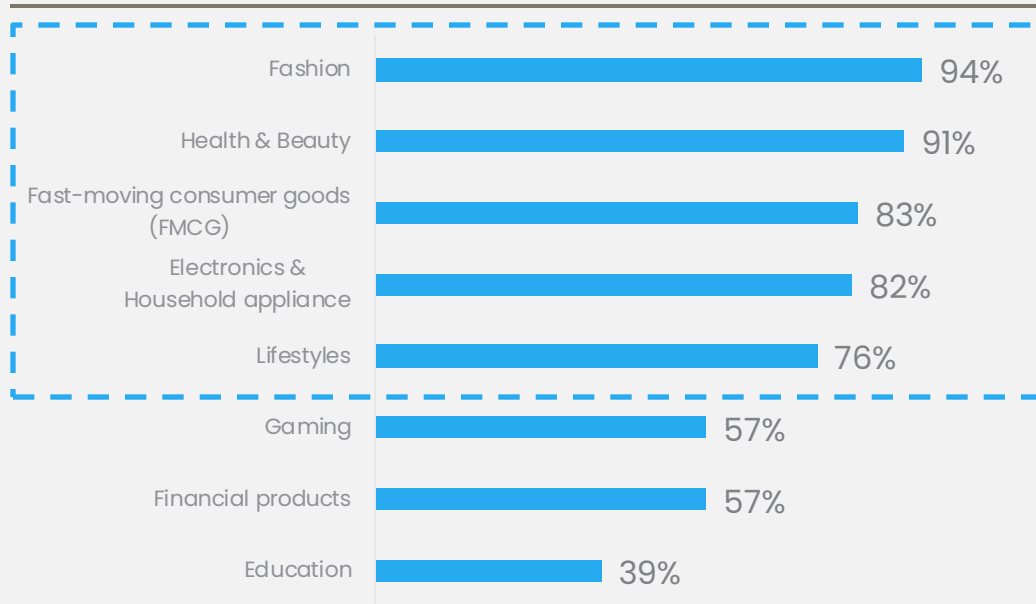


What are the drivers for you to make a purchase in a livestream? (Select up to 5 options)

n=233

Fashion, H&B, and FMCG are the top 3 most-watched categories, followed by Electronics and Lifestyles

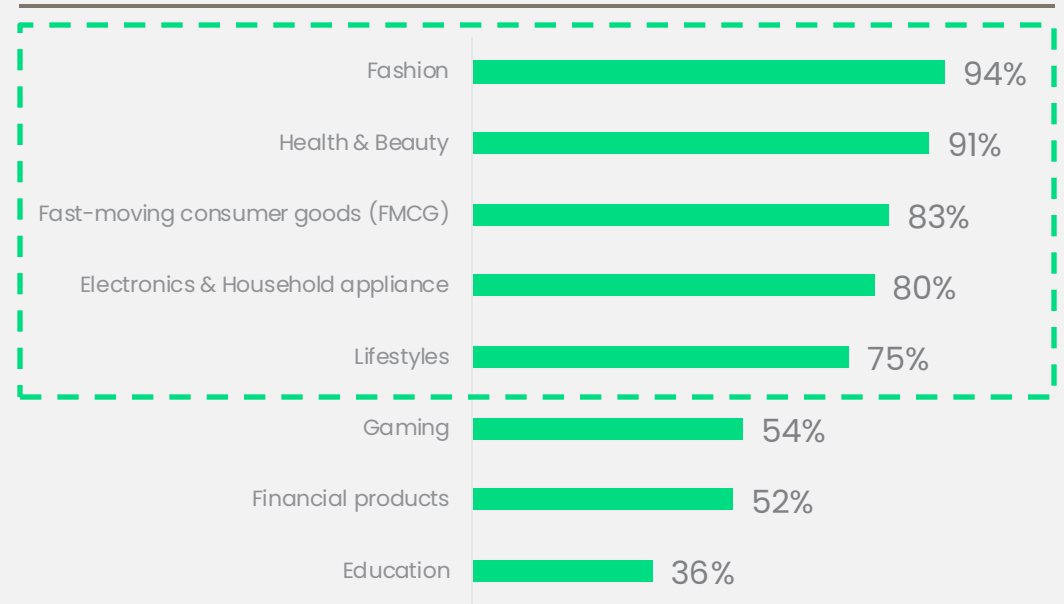
Ever-watched categories in livestream



Which of the following categories have you ever WATCHED in a livestream for shopping?

n=451

L3M watched categories in livestream

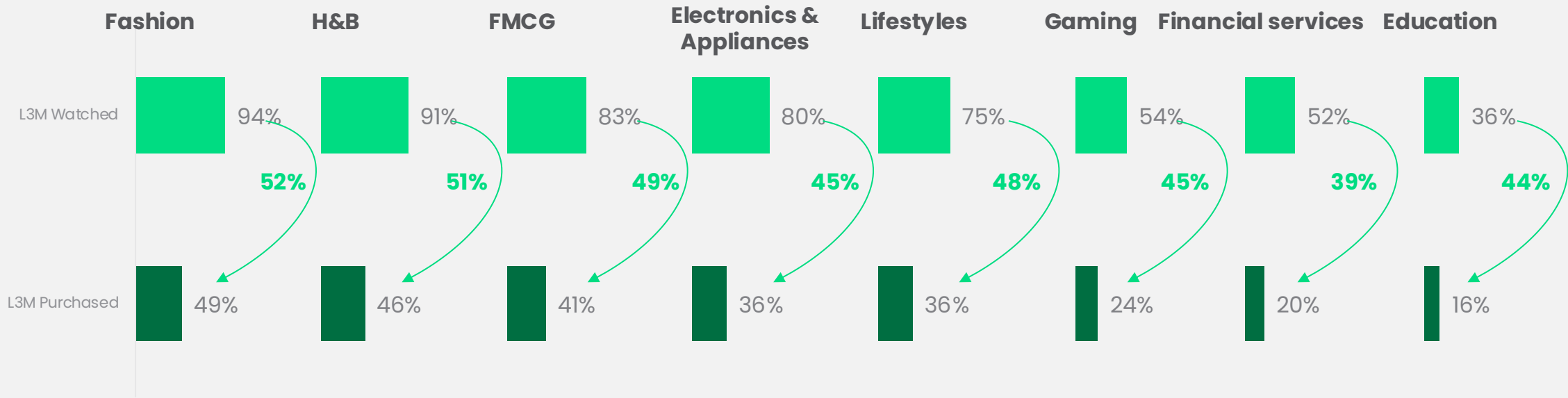


Which of the following categories have you ever WATCHED in a livestream for shopping in the LAST 3 MONTHS?

n=446

Livestreaming consistently illustrate strong conversion across verticals with the highest being Fashion, Health & Beauty and FMCG

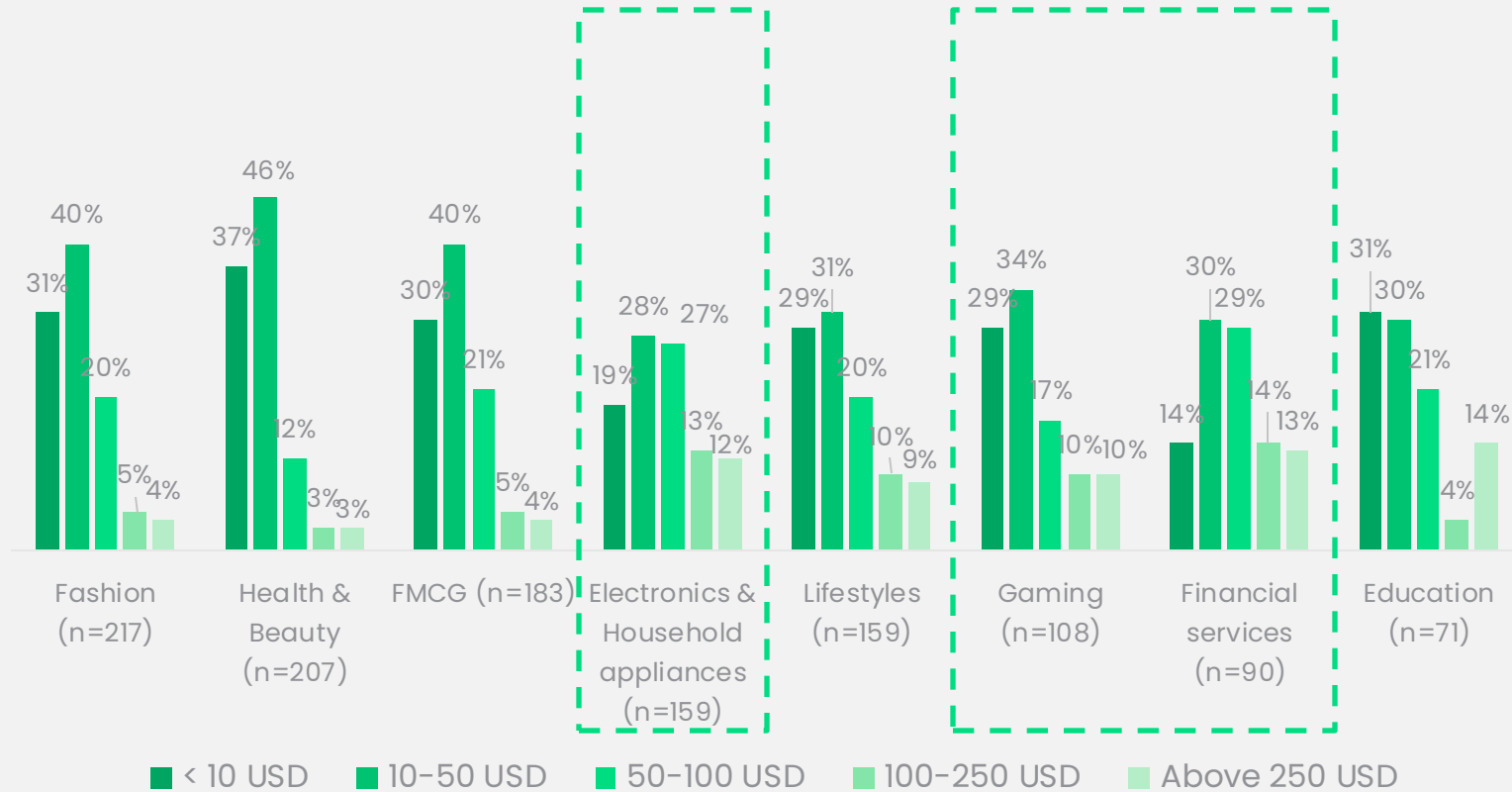
Conversion rate from L3M watched to L3M purchased by categories (Base: People who watched livestream in L3M)



Which categories of product/service have you WATCHED in the livestream in the LAST 3 MONTHS? Have you PURCHASED the livestreamed product/service from each of the below categories in the LAST 3 MONTHS?

n=414

Average value of order by category



*Note: Categories are in order of L3M purchasing rate (from highest to lowest)
 How much on average did you PAY FOR AN ORDER from a livestream in the LAST 3 MONTHS?

Live shoppers' budgets vary significantly across verticals. Brands can cater to these diverse budgets by offering products at various price points within their livestreams. Electronics, Gaming, and Financial services typically see higher average purchase values

Livestreaming platforms

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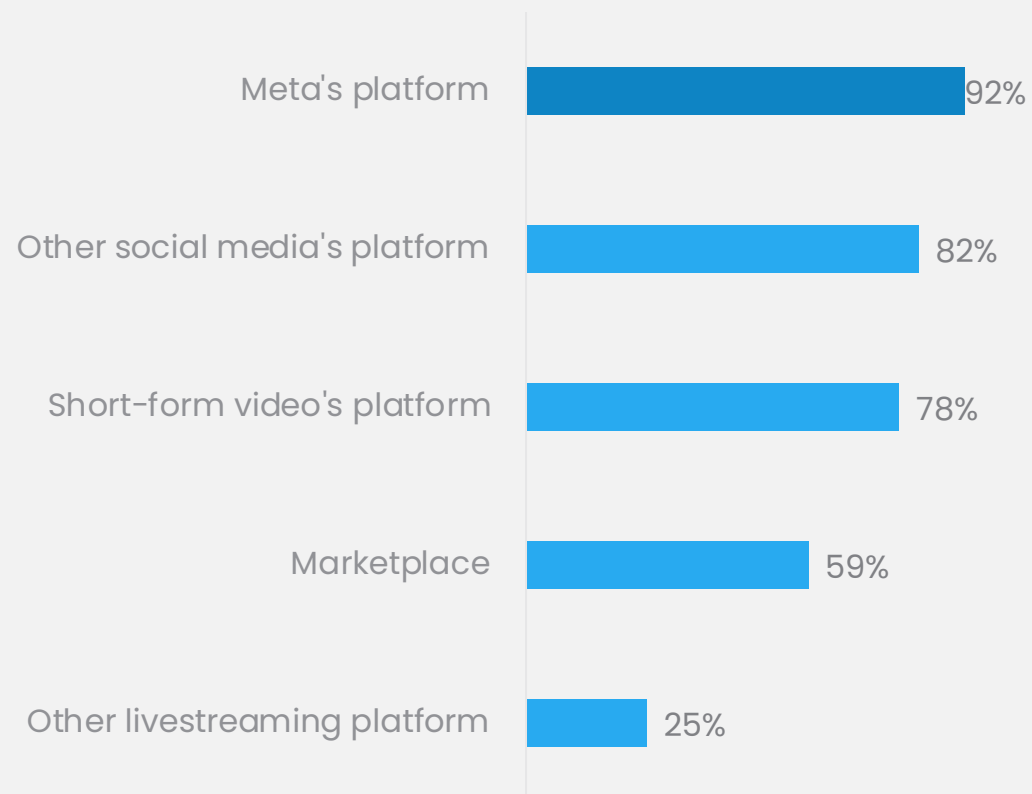


Meta's platforms hold the top spots in livestream viewership in the Philippines with Facebook being the most popular platform

89%

Watched livestream from
Facebook

Livestreaming platforms (of any content)

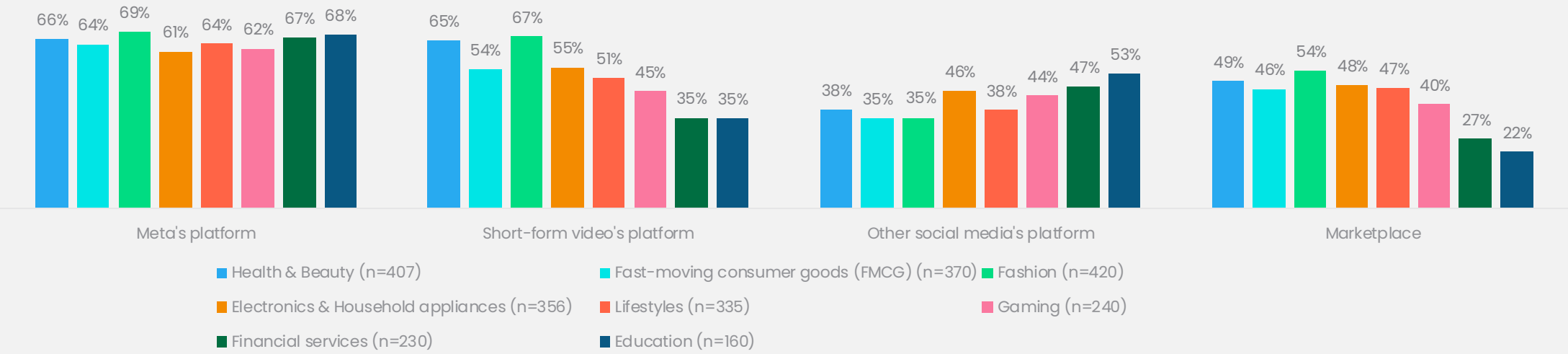


Which platform have you watched livestream from (of any content)?

n=451

It also has the highest rate of viewership for livestreaming across all categories

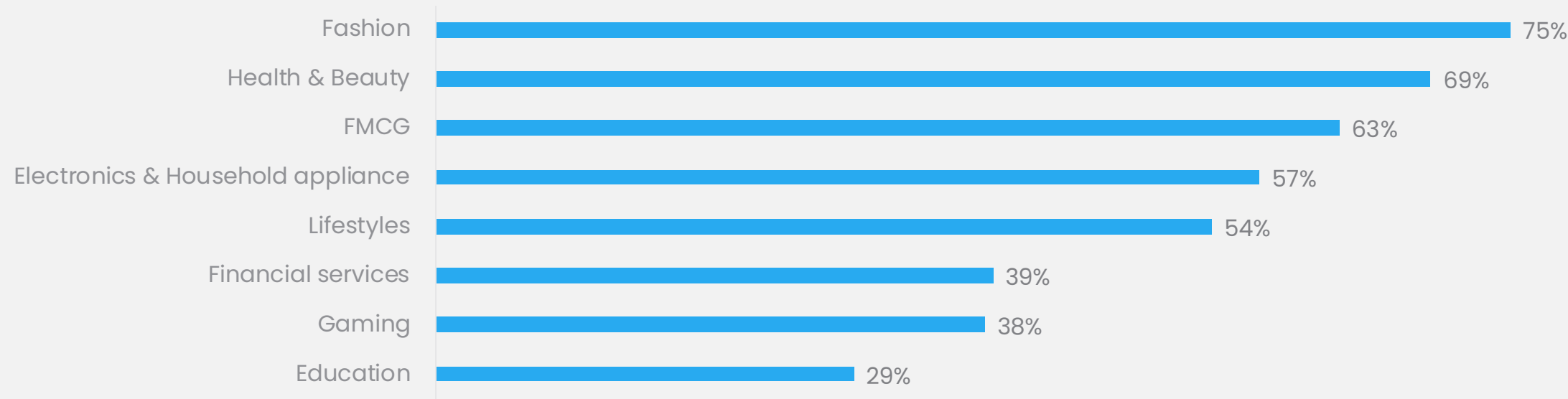
L3M watched platforms for livestreaming by categories



Which platform have you WATCHED in a livestream for product/service introduction and demonstration from for each of the below categories in the LAST 3 MONTHS?

Consumers watch Facebook livestreams to shop for products and services of various verticals

L3M watched categories on Facebook

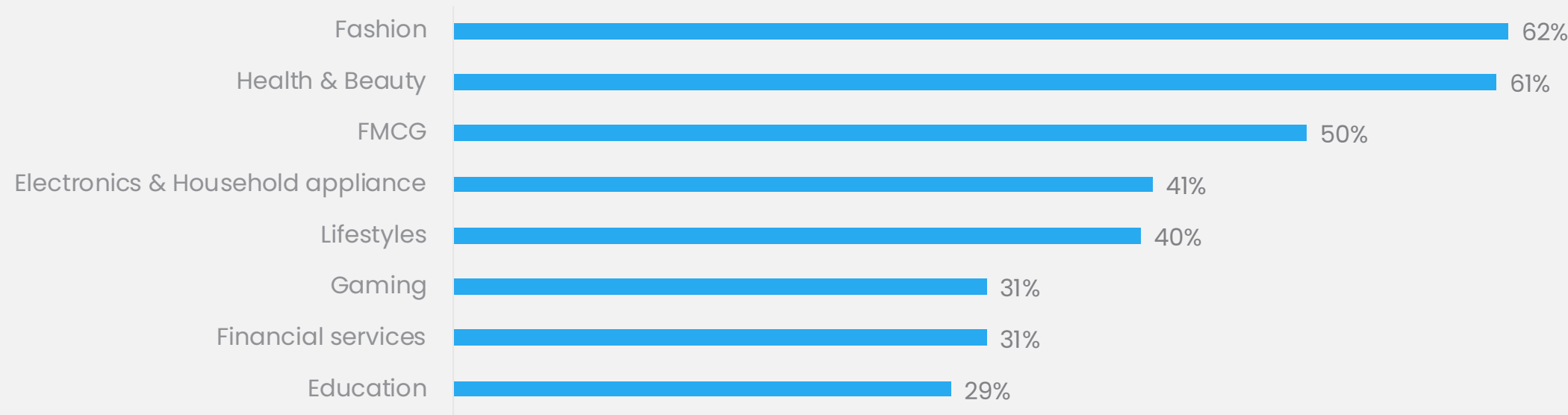


Which platform have you WATCHED in a livestream for shopping from for each of the below categories in the LAST 3 MONTHS?

n=361

Consumers also purchase various categories from Facebook livestream. Fashion and Health & Beauty stand out as the top purchased categories

L3M purchased categories on Facebook

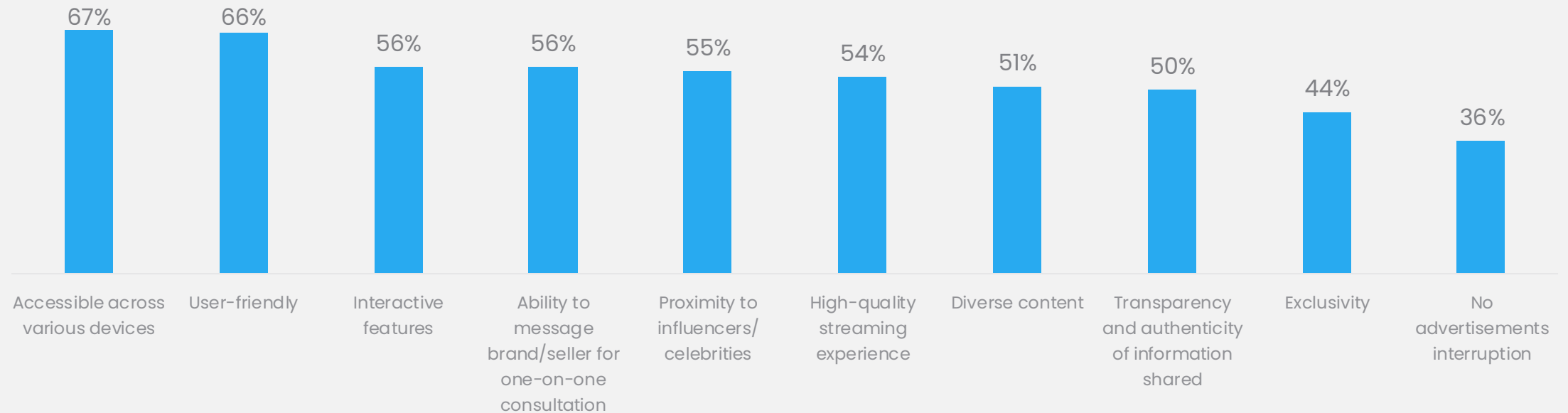


Which platforms did you PLACE THE ORDER for the products/ services you watched in a livestream in the LAST 3 MONTHS?

n=144

Cross-device accessibility, user-friendliness, interactive features and ability to message brands for one-on-one consultation are the key factors for consumers to prefer Facebook Livestreams

Preference factors of Facebook



What factors of the below livestreaming platforms that you like? – [Platform]

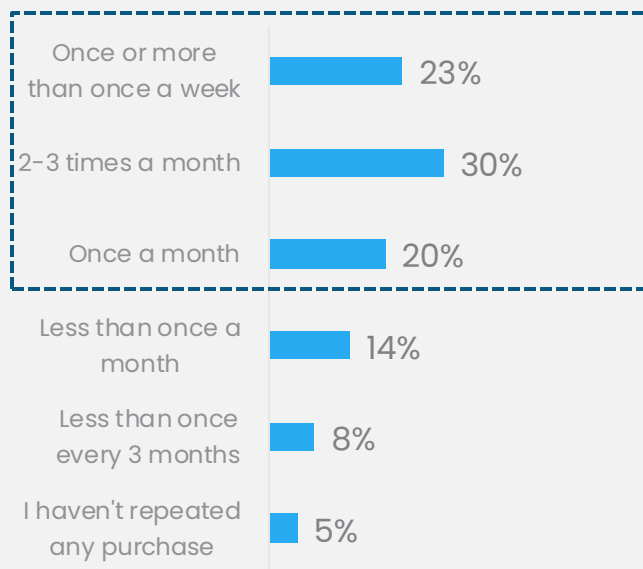
n=401

Post Purchase



Live shopping is here to stay. The majority of Filipino shoppers have a habit of repurchasing from the same livestream business at least once a month. With the trust in live selling brands, 38% of them repurchase with higher order value. Loyalty programs and product diversification are essential to capture life time values of liveshopping habit.

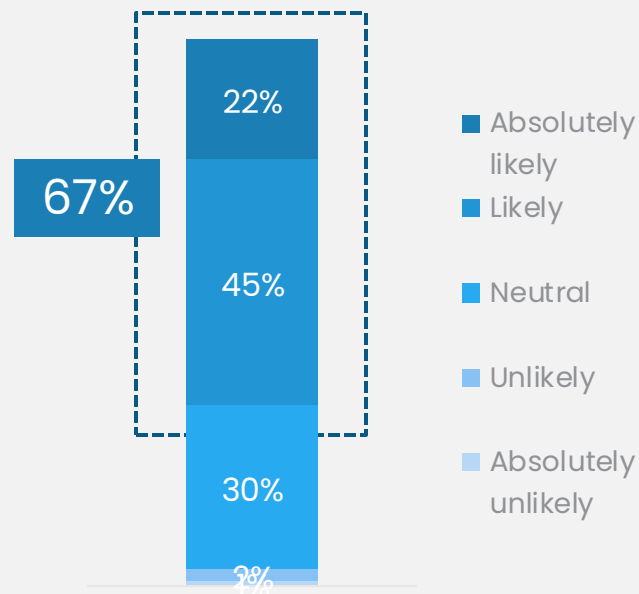
Frequency of repurchase (Base: People who made purchase from livestream)



How often do you repeat purchases from the same livestream business?

n=233

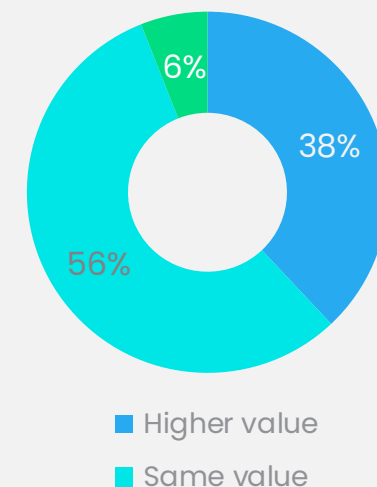
Intention to repurchase (Base: People who repurchased from livestream)



How likely do you intend to repurchase from the same livestream business in the future?

n=231

Value of repurchase (Base: People who repurchased from livestream)



Compare the value of your 2nd purchase with the first purchase from that livestream business?

n=221

Making brands accessible for direct inquiries, personalized consultation and delivering the reply promptly is among the key factors to drive repeated purchases with higher order values.

Drivers for higher value repurchase

53% Ability to message brand/seller for inquiries

46% Good one-on-one consultation during their first purchase

What are the deciding factors for you to repeat purchase with higher value from the same livestream business?

n=105

Contributing factors to good customer service

66% Prompt response (within 24 hours) to messaging inquiries

What do you think contributes to good customer service/ good after-sales services when buying livestreamed products?

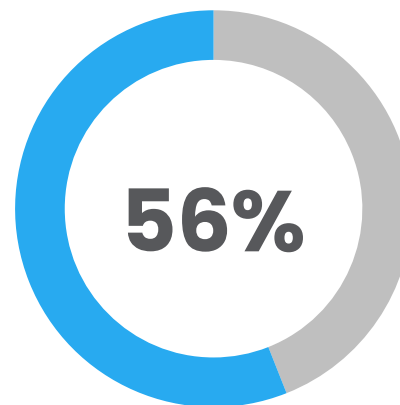
n=701

Messaging plays a critical role in driving connection, inquiries and post-purchase for Live Commerce. It is the most preferred ways to connect with sellers and leveraging the one-to-one messaging can increase repurchase intent



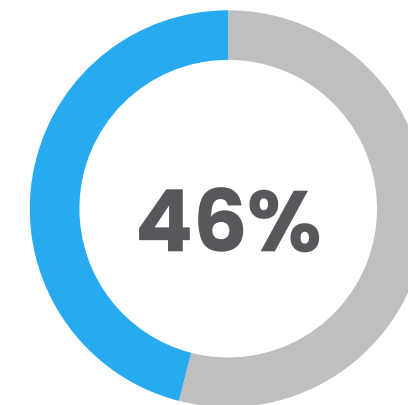
Preferred inquiry method

When viewers want to get in touch with brands during livestream



Preferred Facebook Live over other Livestream platforms

because of the ability to message brands for one-on-one consultation



Will repurchase at higher value if they had good one-on-one consultation

Reach out to us



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