

NOVEMBER 2020 • PRODUCT & TREND

# Shopee 11.11: Trending Fashion Products in Southeast Asia

Introduction | Performance Overview | Discounting Strategy |  
Top 3 Categories | Bestsellers by Category | Key Next Steps

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## Introduction

- **Triple-Digit Boost:** Despite the pandemic, 11.11 outperformed the recent 9.9 sale. Sell-out performance for women's fashion in Singapore and Indonesia registered an uplift of 136% and 123% respectively compared to 9.9.
- **Non-Apparel Categories in Demand:** Bags was the most popular category in both markets. Tops led the apparel category in Indonesia, while Activewear was sought-after in Singapore.
- **Value Hunters:** Consumers in Singapore scoured for better deals with 50-59% discount bracket garnered the highest sell-out. Meanwhile, Indonesians were contented with purchasing at 30-39% off, although most products were markdown deeper at 50% and more.

The world's biggest online shopping event, Singles' Day has broken new records across Asia despite the Covid-19 pandemic. Alibaba ended the shopping bonanza with [USD 75 billion](#) worth of sales, up 95% from its performance last year.

Over in Southeast Asia, Shopee, a major e-commerce player in the region, also [outperformed last year's sales in under an hour](#). The shopping festival was a record-breaking success for the e-tailer, with 200 million items sold on 11.11 itself. Its 11.11 Big Sale campaign, which lasted for three weeks in Singapore and four weeks in Indonesia also gained traction through various daily promotional offers and live stream shows to engage with consumers.

With [strong sales recorded on 9.9](#), how did Singles' Day fare this year? Was it an indicator of a rebound in consumption or merely savvy shoppers taking advantage of killer deals?

11.11



# 200M

items sold  
on 11 November

**The only day where 24 hours  
is not enough**

Instagram @shopee\_sg



## Introduction (cont'd)

This report shares the detailed performance of top categories for Shopee Singapore and Indonesia for the women's fashion segment. Nearly 250,000 data points were analysed from 21 October – 11 November (22 days) in Singapore and 12 October – 11 November (31 days) in Indonesia.

Starting with the respective Covid-19 timeline in Singapore and Indonesia, the subsequent content provides context to the factors that influenced consumer demand and shopping behaviour highlighted throughout this report.

### The Covid-19 Situation

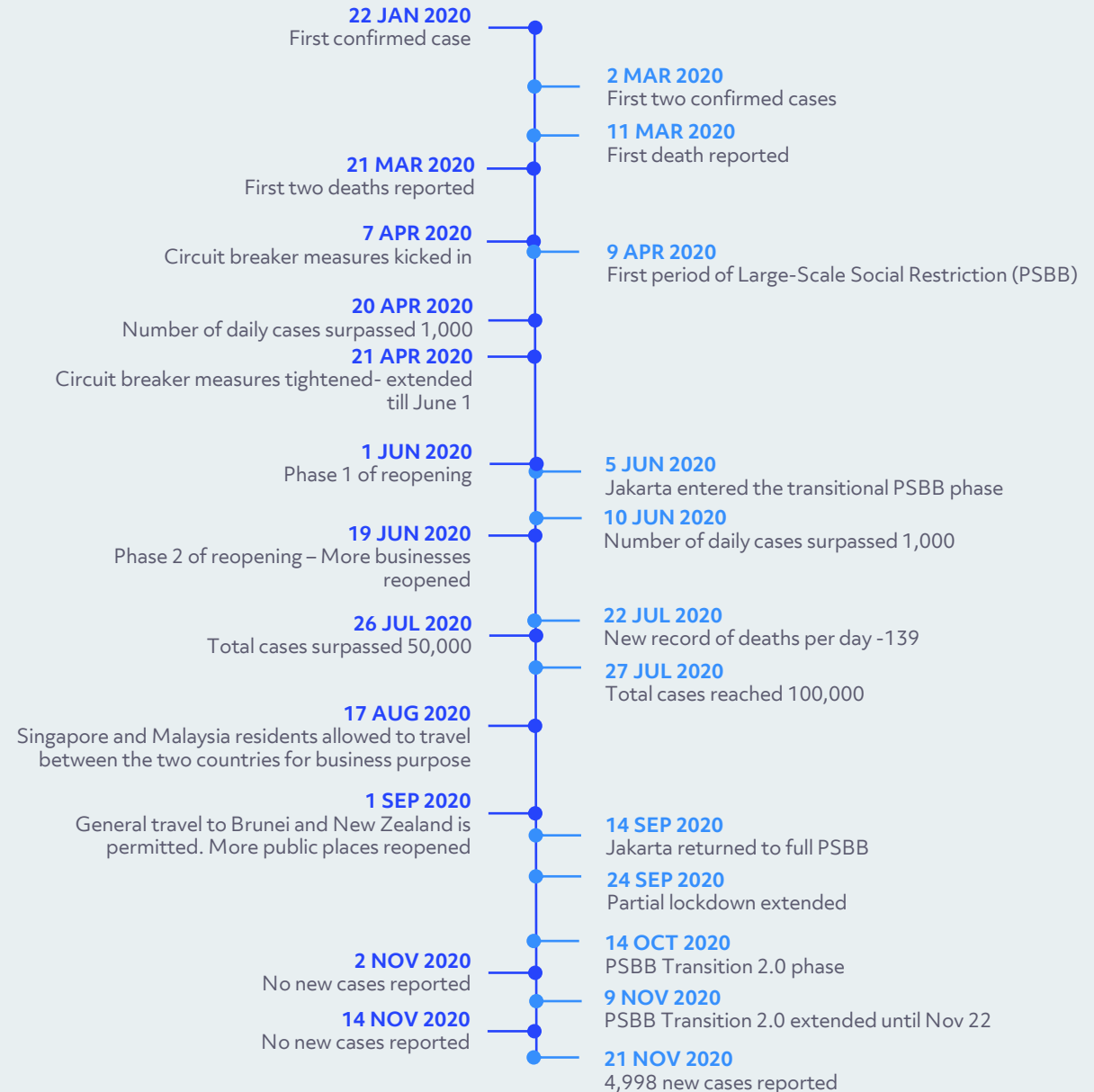
The current state in Singapore and Indonesia are miles apart. Although the number of cases in Singapore and Indonesia started increasing rapidly in the initial stages, Indonesia took a turn for the worse.

Singapore's quick, proactive and aggressive public health response has managed to contain the outbreak. The lives of Singaporeans have returned to normal as early as June, with more businesses and public places reopened. Overseas travel to certain countries has also been permitted in September. Currently, new cases in Singapore have plateaued, with no new case reported for the first time in November.

Meanwhile, Indonesia is still grappling in its Covid-19 response with Large-Scale Social Restriction (PSBB) imposed twice since April. Currently, there are close to 5,000 new daily cases reported and the country has just [entered into a recession](#) for the first time in 22 years.

CHART 1: TIMELINE OF KEY COVID-19 EVENTS IN SINGAPORE AND INDONESIA

● Singapore ● Indonesia



# Singapore: Performance Overview

## Singles' Day Supremacy

Singles' Day solidified its reputation as a major shopping festival in SEA as sell-out performance for its fashion products surpassed that of 9.9 and 10.10 events.

Despite the economic uncertainty brought by the pandemic, 11.11 registered 136% and 283% more sell-out than on 9.9 and 10.10 respectively. The number of discounted products was nearly 2x higher than on 9.9. Consumers were lured by the hype around Singles' Day as the average discount was the shallowest, albeit by 2 percentage point compared with 9.9.

## Campaign Success with Phua Chu Kang

This year, Shopee held its 11.11 Big Sale campaign just a day earlier than last year, for the same duration of three weeks. With over 260% more discounted products this year, sell-out grew in tandem by 372%.

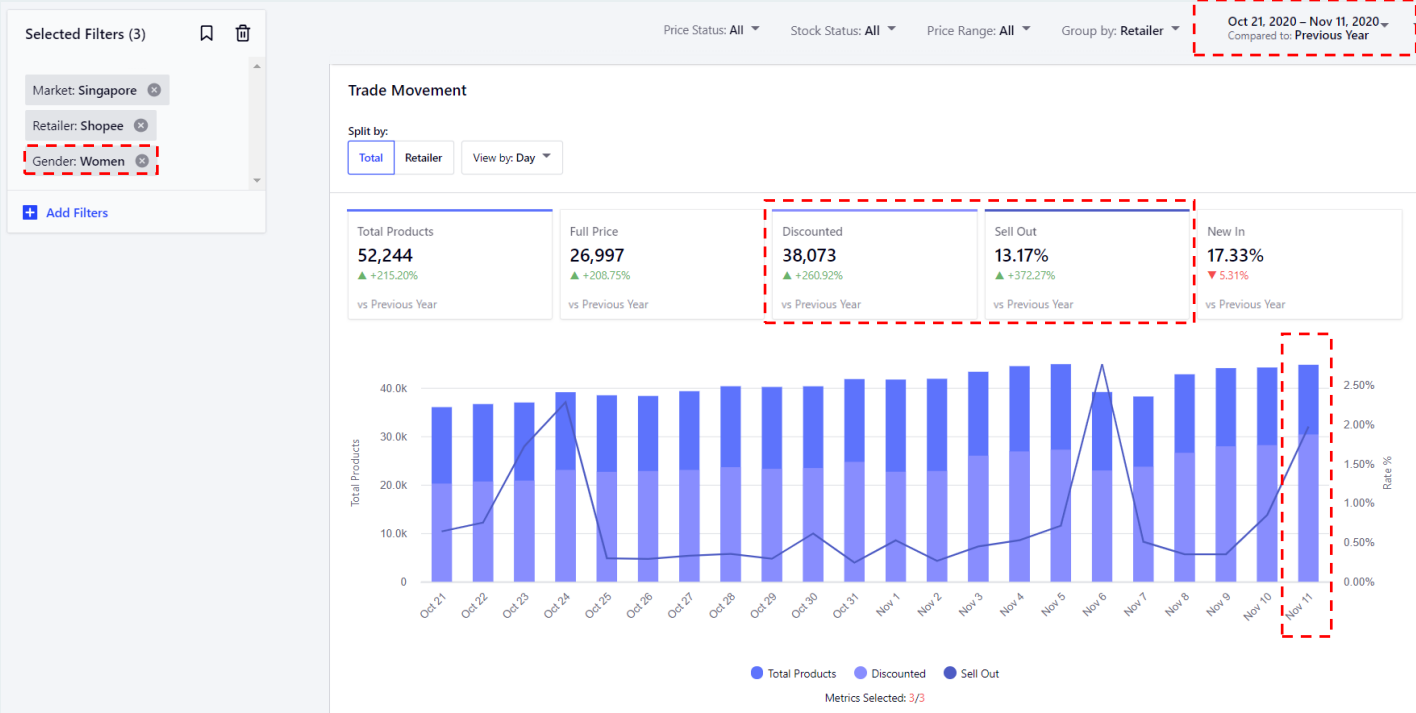
The appointment of [Phua Chu Kang as Shopee's brand ambassador](#) deepened its engagement with local audiences. The cultural icon worked on various initiatives with the brand to connect with Singaporeans. Aside from his exclusive appearances on Shopee Live, shoppers saw the return of special themed days packed with three weeks of exclusive deals and contests.

The spike in sell-out on November 6 proved that consumers were bargain-hunters, as they took advantage of multiple voucher redemptions on 'Vouchers Day', alongside bank coupons and cashback promotions. Shoppers could also place SGD 1 deposit from November 6-10 to enjoy vouchers worth up to SGD 150.

CHART 2: DOUBLE DAY SHOPPING FESTIVALS PERFORMANCE FOR SHOPEE SINGAPORE

	9.9	10.10	11.11
Sell-out rate	1.77%	0.85%	2.53%
Sell-out count	482	297	1,138
Total discounted products	17,284	23,375	30,572
Average discount	38.66%	37.36%	36.62%

CHART 3: TRADE MOVEMENT DURING SINGLES' DAY 2020 CAMPAIGN PERIOD



# Singapore: Discounting Strategy

## Attractive Deals Pre-11.11

Due to the hype around Singles’ Day, many consumers hold off their purchases until the actual day of 11.11. However, consumers actually missed out on better deals offered prior to the big event. The majority of items were markdown deeper during this period, at 40-49% compared to just 20-29% off on Singles’ Day.

The discount range that generated the highest sell-out was 50-59%, in line with the findings by Facebook and Bain & Company that [Southeast Asian consumers are value-hunters](#).

However, brands and retailers do not always have to resort to deep discounting and hurt profit margin. The 40-49% discount bracket returned the same sell-out rate as the 60-69% range, at 4%. It is more important to accurately identify what consumer wants and fulfil that demand.

CHART 4: DISCOUNT MECHANICS LEADING UP TO SINGLES’ DAY

2020	21.10-10.11 (21 Days)	11.11 (1 day)
Total discounted products	35,901	30,163
Most common discount range	40-49%	20-29%
Average discount	40.20%	36.59%
Discount range with the highest sell-out	50-59%	50-59%

CHART 5: DISCOUNT BREAKDOWN WITH SELLOUT



# Singapore: Top 3 Categories

## Non-Apparel Dominance

Non-apparel categories continued to be popular throughout the three-week campaign period and on the big day itself. They were led by Bags and Shoes, which contributed to a combined 28% of total sell-out.

## Activewear on the Lookout

While Bags and Shoes championed the three-week campaign period, Activewear cropped up as the top category on the actual 11.11 event. Its sell-out rate saw an uplift on November 7, due to the 'Sports & Activewear Day' deal by Shopee. It reached a peak on November 11, surpassing other categories with a 2.4% sell-out rate at a median price of USD 34 and average discount of 47%.

CHART 6: TRADE MOVEMENT FOR TOP 3 CATEGORIES



CHART 7: DISCOUNT MECHANICS FOR TOP 3 CATEGORIES

	Bags	Activewear	Shoes
% of Discounted	72%	67%	72%
Most Common Discount Range	40-49%	30-39%	40-49%
Median Price of Sell-Out	USD 114.53	USD 33.49	USD 45.78
Average discount	36.6%	38.66%	41.13%



# Singapore: Designer Bags in Demand

## Performing Subcategories

Bags’ top subcategories from the 11.11 Big Sale were Crossbody Bags, Backpacks and Wallets & Card Holders. Shoppers took advantage of the sale event to snap up designer bags, as most were discounted at an average of 42% off.

The sale bonanza not only managed to entice consumers with its promotional offers but also full-price sale. Backpacks and Wallets & Card Holders had full price sell-outs exceeding the category average at 31%, indicating a great way for brands to leverage major sale event by marketing the right products.

## Bestselling Styles

The minimalist and practical styles that thrive in apparel amidst the pandemic also translated into this key womenswear accessories. Consumers gravitated towards classic, timeless pieces in core colours, which are in line with the current market sentiment. Hybrid styles with detachable straps were also preferred for the added convenience.

CHART 8: BESTSELLING BAGS SUBCATEGORIES

Trade Analysis									
Category	Positioning			Performance					
	Total Products	Median Price	Avg Discount %	New In	Replenished	Total Sell Out	Total Sell Out at Full Price	Total Sell Out at Discounted Price	
All Categories	100.00% 919	USD 98.20	42.83%	10.45% 96	0.33% 3	100.00% 919	31.23% 287	68.77% 632	
Cross Body Bags	26.88% 247	USD 167.17	45.90%	14.17% 35	0.00% 0	100.00% 247	28.34% 70	71.66% 177	
Backpacks	19.04% 175	USD 125.24	42.87%	4.00% 7	0.00% 0	100.00% 175	42.86% 75	57.14% 100	
Wallets & Card Holders	16.97% 156	USD 104.02	43.36%	7.05% 11	0.64% 1	100.00% 156	33.97% 53	66.67% 104	
Shoulder Bags	14.58% 134	USD 185.51	40.84%	17.16% 23	0.75% 1	100.00% 134	15.67% 21	84.33% 113	
Tote Bags	10.88% 100	USD 230.51	44.96%	7.00% 7	0.00% 0	100.00% 100	22.00% 22	78.00% 78	

CHART 9: BESTSELLING BAGS

Selected Filters (4)

Market: Singapore

Retailer: Shopee

Gender: Women

Category: Bags

Add Filters

Save products to: Default

Sort By: New In

DR. MARTENS  
from Shopee  
Dr.Martens 7" Vegan Satchel -Cherry...  
USD 91.65

IELGY  
from Shopee  
IELGY Western style fashion Joker jell...  
USD 8.95

COACH  
from Shopee  
Coach Medium Corner Zip Wallet In ...  
USD 111.47

PRADA  
from Shopee  
Prada Vitello Phenix Medium Wallet ...  
USD 393.69

KATE SPADE  
from Shopee  
Kate Spade Laurel Way Large Carse...  
USD 158.75-227.58

ALDO  
from Shopee  
Aldo Yaya Women Minimalist Trendy ...  
USD 27.87-55.74

FOSSIL  
from Shopee  
Fossil Skylar Crossbody Bag SH8265...  
USD 110.80-246.23

TORY BURCH  
from Shopee  
Tory Burch Nylon Small Tote 73205 B...  
USD 208.13-351.36

VOIR  
from Shopee  
ONLINE EXCLUSIVE - VOIR Crossbod...  
USD 18.84

WINTER TIME  
from Shopee  
Backpack (Himawari)  
USD 47.98

HERSCHEL  
from Shopee  
Herschel Nova Crossbody - Black Cr...  
USD 31.01-56.37

NOSE.OS.SG  
from Shopee  
Nose Love Hearth Shoulder Bag - Nu...  
USD 16.58-53.83

The top subcategories with high sell-out counts were Activewear Tops & T-Shirts, Shoes and Sports Bras. While the majority of Activewear subcategories were commonly discounted at 30-39% off, Shoes saw the deepest discount at 40-49% off.

The recent popularity of women's running products in the market shows no signs of waning. Tank Tops, T-Shirts, Leggings and Shoes made for running were in high demand during the 11.11 sale. Besides that, casual cotton tees in large logo print was popular too.

## Trade Analysis

Category	Positioning			Performance					
	<div><div></div><div>Total Products</div></div>	Median Price	Avg Discount %	New In	Replenished	<div><div></div><div>Total Sell Out</div></div>	Total Sell Out at Full Price	Total Sell Out at Discounted Price	
<div><div></div><div>Activewear Tops &amp; T-Shirts</div></div>	<div><div></div><div>31.63%<div>31</div></div></div>	USD 18.79	<div><div></div><div>46.74%</div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>100.00%<div>31</div></div></div>	<div><div></div><div>25.81%<div>8</div></div></div>	<div><div></div><div>74.19%<div>23</div></div></div>	
<div><div></div><div>Activewear Shoes</div></div>	<div><div></div><div>20.41%<div>20</div></div></div>	USD 70.62	<div><div></div><div>44.95%</div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>100.00%<div>20</div></div></div>	<div><div></div><div>5.00%<div>1</div></div></div>	<div><div></div><div>95.00%<div>19</div></div></div>	
<div><div></div><div>Sports Bras</div></div>	<div><div></div><div>13.27%<div>13</div></div></div>	USD 20.41	<div><div></div><div>47.89%</div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>100.00%<div>13</div></div></div>	<div><div></div><div>30.77%<div>4</div></div></div>	<div><div></div><div>69.23%<div>9</div></div></div>	
<div><div></div><div>Activewear Accessories</div></div>	<div><div></div><div>10.20%<div>10</div></div></div>	USD 56.12	<div><div></div><div>55.25%</div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>100.00%<div>10</div></div></div>	<div><div></div><div>60.00%<div>6</div></div></div>	<div><div></div><div>40.00%<div>4</div></div></div>	
<div><div></div><div>Activewear Pants &amp; Leggings</div></div>	<div><div></div><div>9.18%<div>9</div></div></div>	USD 22.93	<div><div></div><div>48.00%</div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>0.00%<div>0</div></div></div>	<div><div></div><div>100.00%<div>9</div></div></div>	<div><div></div><div>33.33%<div>3</div></div></div>	<div><div></div><div>66.67%<div>6</div></div></div>	

Selected Filters (3)

Market: Singapore



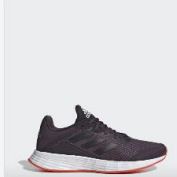

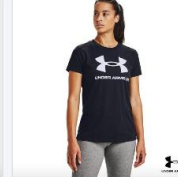
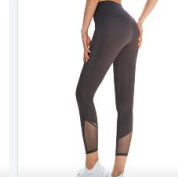
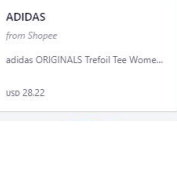

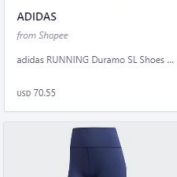
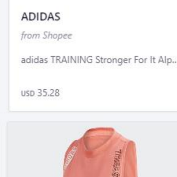
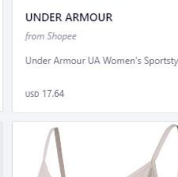
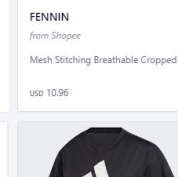
Retailer: Shopee

Gender: Women

+ Add Filters

Save products to: Default

Sort By: New In

 <p><b>ADIDAS</b> from Shopee adidas ORIGINALS Trefoil Tee Women's ... USD 28.22</p>	 <p><b>ADIDAS</b> from Shopee adidas RUNNING Duramo SL Shoes ... USD 70.55</p>	 <p><b>ADIDAS</b> from Shopee adidas RUNNING Duramo SL Shoes ... USD 70.55</p>	 <p><b>ADIDAS</b> from Shopee adidas TRAINING Stronger For It All Alp... USD 35.28</p>	 <p><b>UNDER ARMOUR</b> from Shopee Under Armour UA Women's Sportstyle... USD 17.64</p>	 <p><b>FENNIN</b> from Shopee Mesh Stitching Breathable Cropped ... USD 10.96</p>
 <p><b>NEW BALANCE</b> from Shopee New Balance Hanzo C v2 Women Run... USD 93.13</p>	 <p><b>FENNIN ACTIVE</b> from Shopee Sports Underwear Gathered Shockpr... USD 11.80</p>	 <p><b>ADIDAS</b> from Shopee adidas TRAINING Believe This 2.0 Jac... USD 56.44</p>	 <p><b>ADIDAS</b> from Shopee adidas adidas Graphic Tank Top Wo... USD 21.17</p>	 <p><b>PUMA</b> from Shopee Puma Seamless Bra USD 31.11</p>	 <p><b>ADIDAS</b> from Shopee adidas TRAINING Badge of Sport Lo... USD 28.22</p>



# Singapore: Comfort First in Shoes

## Performing Subcategories

Casual Sandals & Flip Flops, Heels and Sneakers performed best out of the other footwear styles. As life returned to normal for many in Singapore, Heels have gained traction again with the subcategory contributing to an above average full-price sell-out. To drive higher conversions, brands employed a deeper discount of 50-59% off versus the category average of 40-49%.

## Bestselling Styles

Similar to bags, consumers continued to prioritise comfort and practicality for footwear. The bestselling Heels were also geared towards these features as the majority of the bestsellers consisted of block heels with low to medium height. Black was the most popular colour choice followed by neutral tones of nude and grey.

CHART 12: BESTSELLING SHOES SUBCATEGORIES

Trade Analysis								
Category	Positioning			Performance				
	Total Products	Median Price	Avg Discount %	New In	Replenished	Total Sell Out	Total Sell Out at Full Price	Total Sell Out at Discounted Price
All Categories	100.00% 580	USD 45.78	41.19%	13.45% 78	5.69% 33	100.00% 580	32.76% 190	66.90% 388
Sandals & Flip Flops	24.31% 141	USD 45.99	39.26%	14.18% 20	7.09% 10	100.00% 141	37.59% 53	62.41% 88
Heels	22.24% 129	USD 50.02	52.37%	23.26% 30	1.55% 2	100.00% 129	37.21% 48	62.79% 81
Sneakers	15.69% 91	USD 82.28	33.40%	3.30% 3	8.79% 8	100.00% 91	18.68% 17	79.12% 72
Wedges	8.10% 47	USD 45.91	46.63%	6.38% 3	6.38% 3	100.00% 47	8.51% 4	91.49% 43
Pumps	8.10% 47	USD 36.06	41.44%	38.30% 18	0.00% 0	100.00% 47	31.91% 15	68.09% 32

CHART 13: BESTSELLING SHOES

Selected Filters (4)

Market: Singapore

Retailer: Shopee


Gender: Women

Category: Shoes

Add Filters

Save products to: Default

Sort By: New In




MONOBOMALAYSIA

from Shopee

Monobo MONIGA 5.1 Sandals Flip Flops

USD 7.27-24.94




BIRKENSTOCK

from Shopee

Birkenstock Gizah Birko-Flor Vegan ...

USD 106.57




BATA

from Shopee

POWER POWER GREY SNEAKERS 50

USD 19.03-33.16




BIRKENSTOCK

from Shopee

Birkenstock Buckley Suede Leather ...

USD 119.98




DR CARDIN

from Shopee

Dr. Cardin Women Breathable Slip-On ...

USD 22.09-40.26




BIRKENSTOCK

from Shopee

Birkenstock Yao Birko-Flor Vegan Wo...

USD 93.17




ALDO

from Shopee

ALDO Sevilassa Women Block Heel P...

USD 31.54-50.82




NOSE

from Shopee

Nose Sport Band Sandal - Black

USD 38.71




FAYT

from Shopee

FAYT Cassia Mauve

USD 21.24




KISSANDTELLOS

from Shopee

Kiss & Tell Callie Heels - Dusty Rose

USD 41.96




FAYT

from Shopee

FAYT X CLAUDIA SETYOHADI Dahlia ...

USD 17.04



FAYT

from Shopee

FAYT X CLAUDIA SETYOHADI Camell...

USD 17.04

# Indonesia: Performance Overview

## Singles' Day Reigned

Despite entering into its first recession in 22 years, Singles' Day in Indonesia was a huge success with sell-out performance exceeding previous sale events. Sell-out count jumped by 123% and 161% on the big day itself compared to 9.9 and 10.10 respectively.

To entice consumers, the average discount offered was deeper on 11.11 compared to its predecessors, albeit by 1 percentage point. However, the number of products offered on the site was 10% less than on 9.9, subsequently causing the discounted items count to shrink in tandem.

## More than Just Discounts

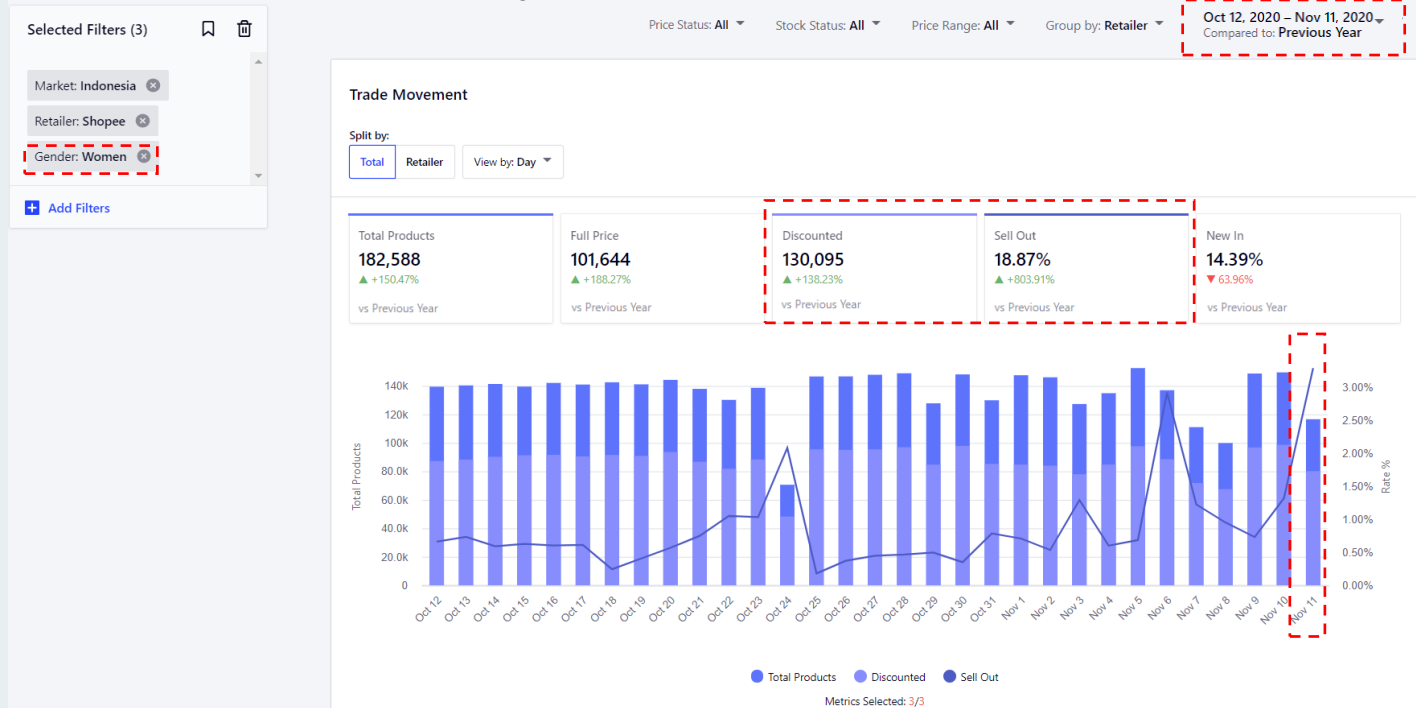
The success of Singles' Day in Indonesia was brought by a few factors. The 11.11 Big Sale campaign that started 2 days earlier this year for a month with daily flash deals and cashback proved to be enticing for value-hunters. The [appointment of K-Pop group Stray Kids](#) as the brand's ambassador also played a part in widening its reach.

This year, Shopee played a bigger role in strengthening its support for society and local businesses through its 11.11 Big Sale campaign. The 11.11 Big Charity, which Shopee Indonesia collaborated with Save The Children organisation, in inviting users to donate for educational assistance in the country.

CHART 14: DOUBLE DAY SHOPPING FESTIVALS PERFORMANCE FOR SHOPEE INDONESIA

	9.9	10.10	11.11
Sell-out rate	1.32%	1.07%	3.29%
Sell-out count	1,725	1,473	3,841
Total discounted products	89,019	97,977	80,161
Average discount	41.70%	41.93%	42.69%

CHART 15: TRADE MOVEMENT DURING SINGLES' DAY 2020 CAMPAIGN PERIOD



# Indonesia: Discounting Strategy

## Shallow Discounts Drove the Highest Sell-Out

Overall, the discount strategy during the campaign period against the actual day of 11.11 did not differ much.

Shopee Indonesia invested most heavily in the 50-59% discount range, followed by 30-39%. However, the former discount bracket failed to generate high sell-out. Digging deeper into the discounted assortments revealed an array of dressier apparel offered at 50-59% off, which did not meet the locals' [current preference for minimalist styles](#).

CHART 16: DISCOUNT MECHANICS LEADING UP TO SINGLES' DAY

2020	12.10-10.11 (31 Days)	11.11 (1 Day)
Total discounted products	125,571	80,161
Most common discount range	50-59%	50-59%
Average discount	43.80%	42.70%
Discount range with the highest sell-out	30-39%	30-39%

CHART 17: DISCOUNT BREAKDOWN WITH SELL-OUT



# Indonesia: Top 3 Categories

## Non-Apparel Popularity

Tops led the apparel category throughout the Singles’ Day campaign with 32% contribution in total sell-out. The category recorded the lowest median price for sell-out, indicating a demand driven by discounts.

Besides that, Indonesian consumers were also spending heavily on Bags and Accessories during the Singles’ Day campaign. With the extension of Large Scale Social Restrictions (PSBB), Shopee resorted to employ deeper discounts on Bags at 60-69% off, which resulted in high sell-out count for the category.

CHART 18: TRADE MOVEMENT FOR TOP 3 CATEGORIES



CHART 19: DISCOUNT MECHANICS FOR TOP 3 CATEGORIES

	Tops	Bags	Accessories
% of Discounted	76%	76%	72%
Most Common Discount Range	50-59%	60-69%	30-39%
Median Price of Sell-Out	USD 11.14	USD 15.30	USD 65.73
Average discount	45.40%	48.78%	32.76%

# Indonesia: Minimalist Styles in Tops

## Performing Subcategories

Blouses, T-Shirts and Shirts performed best out of other subcategories. Overall, Tops were largely driven by discounts. Although majority of the subcategories were discounted at 50-59% off, higher sell-out rates were observed in the 60-79% discount range.

## Bestselling Styles

The details commonly seen in bestsellers were minimalist tops in a relaxed silhouette. Besides the usual black and white, light and muted seasonal colours were also favoured by consumers.

CHART 24: BESTSELLING TOPS SUBCATEGORIES

Trade Analysis									
Category	Positioning			Performance					
	Total Products	Median Price	Avg Discount %	New In	Replenished	Total Sell Out	Total Sell Out at Full Price	Total Sell Out at Discounted Price	
All Categories	100.00% 3,663	USD 9.61	49.22%	11.08% 406	30.00% 1,099	100.00% 3,663	28.01% 1,026	72.21% 2,645	
Blouses	38.00% 1,392	USD 10.32	51.73%	9.70% 135	32.83% 457	100.00% 1,392	27.59% 384	72.77% 1,013	
T-Shirts	24.62% 902	USD 8.05	47.33%	9.87% 89	29.38% 265	100.00% 902	27.72% 250	72.51% 654	
Shirts	22.33% 818	USD 11.48	49.95%	11.86% 97	29.22% 239	100.00% 818	22.74% 186	77.38% 633	
Tank Tops	4.18% 153	USD 16.53	46.10%	4.58% 7	30.72% 47	100.00% 153	43.14% 66	56.86% 87	

CHART 25: BESTSELLING TOPS

Selected Filters (4)

Market: Indonesia

Retailer: Shopee

Gender: Women

Category: Tops

Add Filters

Save products to: Default

Sort By: Most Replenished

**HAMMER**  
from Shopee  
Hammer T-Shirt Fashion ESTF845 W1  
USD 5.26

**MISSISSIPPI**  
from Shopee  
Mississippi A05536M KAOS Khaki  
USD 4.54

**LEVI'S**  
from Shopee  
Levi's Ultimate Boyfriend Amelie Stri...  
USD 19.75

**BERRYBENKA**  
from Shopee  
Berrybenka - Ecca Linen Loose Shirt  
USD 9.81-11.52

**NYLA**  
from Shopee  
NYLA - Sarah Hijau Top  
USD 8.23-11.19

**HIJABENKA**  
from Shopee  
Hijabenka - Wanisa Asymmetric Blou...  
USD 9.88-19.09

**BERRYBENKA**  
from Shopee  
Berrybenka - Tinker Wafer Layers Tan...  
USD 2.46-17.33

**BERRYBENKA**  
from Shopee  
Berrybenka - Hadley Layered Top  
USD 9.48-17.71

**MISSIS**  
from Shopee  
Mississippi A05536M KAOS WANITA ...  
USD 4.54-7.57

**COLORBOX**  
from Shopee  
Colorbox Tanktop iTkfh219U051 Pink  
USD 2.37-3.59

**ET CETERA**  
from Shopee  
et cetera Flower embroidery t-shirt 8...  
USD 3.88

**BERRYBENKA**  
from Shopee  
Berrybenka - Francisca Short Sleeve ...  
USD 7.37

# Indonesia: Strong Full Price Sell-Out on Bags

## Performing Subcategories

The subcategories with the highest sell-out counts were Crossbody Bags, Backpacks, and Wallets & Card Holders. Despite having majority of the products on 60-69% off, Backpacks and Wallets & Card Holders still managed to drive above average full price sell-out.

## Bestselling Styles

Indonesian consumers gravitated towards smaller sized bags with more detailing such as tassels and chain straps.

CHART 20: BESTSELLING BAGS SUBCATEGORIES



Trade Analysis									
Category	Positioning			Performance					
	 Total Products	Median Price	Avg Discount %	New In	Replenished	 Total Sell Out	Total Sell Out at Full Price	Total Sell Out at Discounted Price	
All Categories	100.00% 11,640	USD 14.05	44.55%	9.27% 1,079	11.49% 1,338	100.00% 11,640	29.48% 3,432	70.73% 8,233	
 Bags	35.02% 4,076	USD 16.17	50.35%	8.66% 353	4.86% 198	100.00% 4,076	30.64% 1,249	69.63% 2,838	
Cross Body Bags	30.23% 1,232	USD 20.37	53.06%	7.39% 91	4.55% 56	100.00% 1,232	19.40% 239	80.76% 995	
Backpacks	14.13% 576	USD 23.66	48.74%	6.25% 36	5.03% 29	100.00% 576	36.81% 212	63.54% 368	
Wallets & Card Holders	12.95% 528	USD 14.61	49.60%	11.17% 59	4.17% 22	100.00% 528	40.72% 215	59.47% 314	
Tote Bags	12.59% 513	USD 21.76	50.66%	8.19% 42	4.29% 22	100.00% 513	25.54% 131	74.66% 383	

CHART 21: BESTSELLING BAGS

Selected Filters (4)

Market: Indonesia

Retailer: Shopee

Gender: Women

Category: Bags

+

Add Filters

SOPHIE PARIS  
*from Shopee*  
Sophie Paris Dompot Wanita Ellinore...  
USD 12.50

SOPHIE PARIS  
*from Shopee*  
Sophie Paris Dompot Wanita Grantur...  
USD 8.55

ELIZABETH  
*from Shopee*  
Elizabeth Bag Brenna Sling Bag Pink  
USD 17.98

ELIZABETH  
*from Shopee*  
Tas Elizabeth Shanahan Handbag Pink  
USD 25.68

FLASHY  
*from Shopee*  
Flashy Tas Ransel Wanita - Mabu Thr...  
USD 18.37

WALLTS  
*from Shopee*  
Sample and Old Stok Maita Devian...  
USD 5.27

DONATELLO  
*from Shopee*  
Donatello TS115500 Slingbag Wanita  
USD 20.74

ELIZABETH  
*from Shopee*  
Tas Elizabeth Bag Maire Backpack Pink  
USD 18.90

PUMA  
*from Shopee*  
Puma Phase Small Backpack-07548820  
USD 17.05

ELIZABETH  
*from Shopee*  
Elizabeth Bag Alka Clutch Black  
USD 16.46

HUSH PUPPIES  
*from Shopee*  
Hush Puppies Concerta Top Handle L...  
USD 50.65-72.36

JANSPORT  
*from Shopee*  
Tas Jansport Half Pint City Lights  
USD 7.88-10.14

Save products to: Default

Sort By: New In



Watches, Hats and Belts made up nearly 80% of the total bestsellers for Accessories. Watches led with 65% sell-out contribution, despite having the highest median price compared to its counterparts. This shows how consumers used the shopping period as a chance to snap up bargains, especially on big-ticket items. Although the average discount was among the lowest, at just over 30%, it was definitely enough to entice consumers.

Classic analogue watches in stainless steel or with gold accents were in high demand during the sale event. As for Hats, basic baseball cap with embroidered logos in black were the most popular.

Meanwhile, consumers showed preference towards belts in core colours with a statement buckle.

## Trade Analysis

Category		Positioning				Performance						
		<div><div></div><div>Total Products</div></div>	Median Price	Avg Discount %		New In	Replenished	<div><div></div><div>Total Sell Out</div></div>	Total Sell Out at Full Price	Total Sell Out at Discounted Price		
All Categories		<div>100.00%</div> <div>3,901</div>	USD 33.06		33.92%		<div>8.20%</div> <div>320</div>	<div>1.05%</div> <div>41</div>	<div>100.00%</div> <div>3,901</div>	<div>29.66%</div> <div>1,157</div>	<div>70.49%</div> <div>2,750</div>	
<div><div></div><div></div></div>	Accessories	<div>100.00%</div> <div>3,901</div>	USD 33.06		33.92%		<div>8.20%</div> <div>320</div>	<div>1.05%</div> <div>41</div>	<div>100.00%</div> <div>3,901</div>	<div>29.66%</div> <div>1,157</div>	<div>70.49%</div> <div>2,750</div>	
<div><div></div><div></div></div>	Watches & Timepieces	<div>64.65%</div> <div>2,532</div>	USD 65.22		32.88%		<div>4.72%</div> <div>119</div>	<div>0.40%</div> <div>10</div>	<div>100.00%</div> <div>2,522</div>	<div>18.24%</div> <div>460</div>	<div>81.84%</div> <div>2,064</div>	
	Hats	<div>11.71%</div> <div>457</div>	USD 8.97		39.33%		<div>16.63%</div> <div>76</div>	<div>2.84%</div> <div>13</div>	<div>100.00%</div> <div>457</div>	<div>34.79%</div> <div>159</div>	<div>65.43%</div> <div>299</div>	
	Belts	<div>4.23%</div> <div>165</div>	USD 20.13		48.59%		<div>1.82%</div> <div>3</div>	<div>0.00%</div> <div>0</div>	<div>100.00%</div> <div>165</div>	<div>80.61%</div> <div>133</div>	<div>19.39%</div> <div>32</div>	

Selected Filters (4)
X
Save products to: Default ▾
Sort By: New In ▾

**Market:** Indonesia

**Retailer:** Shopee

**Gender:** Women

**Category:** Accessories

Add Filters

<p>ALEXANDRE CHRISTIE from Shopee</p> <p>Jam Tangan Wanita Alexandre Christi...</p> <p>USD 40.63</p>	<p>ALEXANDRE CHRISTIE from Shopee</p> <p>Alexandre Christie AC9225 LHBR8...</p> <p>USD 73.74</p>	<p>ALEXANDRE CHRISTIE from Shopee</p> <p>Alexandre Christie AC9226 LHBRG8...</p> <p>USD 73.74</p>	<p>CASIO</p> <p>50m WATER RESISTANT 31.2mm THICKNESS 1 year LIMITED WARRANTY</p> <p>CASIO from Shopee</p> <p>Casio Jam Tangan Wanita LTP-1308D...</p> <p>USD 47.34</p>	<p>CASIO</p> <p>WATER RESISTANT 20.5mm THICKNESS 1 year LIMITED WARRANTY</p> <p>CASIO from Shopee</p> <p>Casio Jam Tangan Wanita LTP-1238D...</p> <p>USD 41.42</p>	<p>CASIO</p> <p>WATER RESISTANT 20.5mm THICKNESS 1 year LIMITED WARRANTY</p> <p>CASIO from Shopee</p> <p>Casio Jam Tangan Wanita LTP-1238D...</p> <p>USD 41.42</p>
<p>FILA from Shopee</p> <p>FILA Voyager Accessories Collection ...</p> <p>USD 23.04–59.18</p>	<p>QUEEN BEE from Shopee</p> <p>Queen Beer - Baseball Hat Cozy Black</p> <p>USD 4.94–9.88</p>	<p>QUEEN BEE from Shopee</p> <p>Queen Beer - Baseball Hat Bianca Bla...</p> <p>USD 6.91–9.88</p>	<p>MANGO</p> <p>MANGO - BELT NAVA</p> <p>USD 13.10</p>	<p>MANGO</p> <p>MANGO - BELT EDU</p> <p>USD 16.40–19.43</p>	<p>MANGO from Shopee</p> <p>MANGO - BELT</p> <p>USD 13.10–14.47</p>

## Important Next Steps

**Optimise Full Price Sell-Out:** The strong performance during Singles' Day shopping festival this year signals a rebound in consumer spending. Although the sale event is synonymous with attractive promotions and flash deals, there is also an opportunity for brands to drive full price sell-out.

As life gradually returns to normalcy in Singapore, Heels saw a full price sell-out that exceeded the category average during the discount bonanza. Brands should not just focus on resorting to discounting but optimise assortments to capitalise on current demand or post-Covid lifestyles.

**Understand Consumer Demand with Data:** The performing categories and subcategories during Singles' Day not only gave insights into the current consumer demand, but also prompted brands to take the necessary actions. For instance, as Watches & Timepieces performed well in Shopee Indonesia at shallow discounts, brands can shift slow-moving stock at other distribution channels to the platform. Omnilytics' fashion market insights tool can help brands plan and execute this seamlessly with greater visibility on assortment, pricing and discounts.

**Go Granular:** The results shown in Chart 5 and 16 have proved that deep discounts do not result in high sell-out. A key learning observed from both markets is that markdowns can be effective when the right assortments are paired with the right discounts and launched at the right time. Instead of deploying blanket discounts across categories, brands should plan and determine which items to discount and how deep should they be offered to achieve clearance target while protecting margins.



# Definition of Key Metrics

Metric	Description
Assortment SKUs Count	The total count of stock keeping unit (SKU) i.e. the number of styles that a brand offers. In the report context, it is the total product count within a data set.
Popularity Score	Popularity score takes into account product age, replenishment factor and discount rate over time.
Trend Score	Trend score is the average popularity score in the last 6 months. It is the difference in popularity score between current category and all categories. If current category score is above all categories average, the line will be green, and the score will be positive. The more popular a category relative to other categories is, the higher is the score. The less popular categories will be red, with a negative score.
Median Price	Refers to the price of the product at the mid point of the data set.
New-In	The products that are newly added to the retail website within the timeframe selected.
New-In Contribution %	Calculated by adding the number of new-in product count over the total new-in count within a data set.
Discounted	The products that were listed with a markdown within the time frame selected.
Sell-Out	A product registers a sell-out event when it is indicated as out-of-stock or no longer published on the website.
Sell-Out Rate	Calculated by dividing the number of out-of-stock product count over the total product count within a data set.
Sell-Out Rate at Full Price	Signals consumers' willingness to pay at full price. It is calculated by dividing the number of out-of-stock product count at full price over the total number of out-of-stock product count.
Sell-Out Contribution	Calculated by dividing the number of sell-out product count over the total sell-out count within a data set.

# Get in touch

Omnilytics is a fashion analytics company that helps brands and retailers – born to make data accessible and insights actionable so that businesses can make decisions with confidence and speed. At the core of what Omnilytics does is the belief that information is power; pairing deep industry expertise and ground-breaking technical innovation to bolster businesses' agility with data-driven insights.

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