

2021 Singapore customer trends

Smart Nation, Smart Living



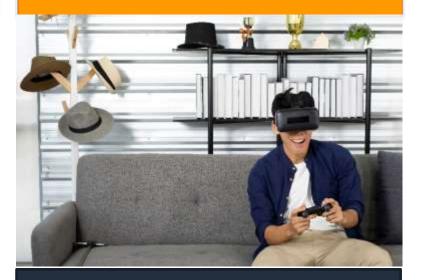
With work from home being predominant in Singapore in 2020-2021, smart home and home office products including robot vacuum cleaners, smart gardens, laptops, wireless and phone accessories were on the rise.

Wellness & self-care



Work-life integration drove the wellness & selfcare theme in 2021, with home-based health, fitness, & skincare driving sales of massage equipment, supplements, fitness watches, diffusers and facial products.

Entertainment at home



A lot of time spent at home unwinding saw Singapore customers looking for at home entertainment in the form of video games, board games, gaming devices and books.



2022 Amazon Singapore customer trends

Based on internal Amazon Singapore data, and external industry data, as Singapore enters 2022, we expect online shopping categories to trend broadly into 3 segments in the emerging post-pandemic world:

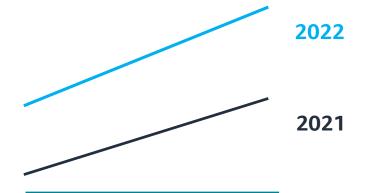
Stable growth

Online shopping categories that have reached a new post-pandemic baseline with stable growth propelled by new enduring habits or trends



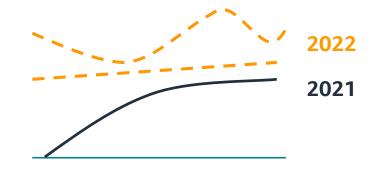
High growth

Online shopping categories with accelerated growth throughout the pandemic, and continue to show growth opportunities due to untapped demand



New norms / externally-driven growth

Online shopping categories that have seen increased digitalization trends driving sales during the pandemic, however 2022 outlook may see fluctuations due to external factors (work-from-home, vaccinated travel lanes) or the category may have reached a new baseline





2022 Amazon Singapore customer trends: Stable growth categories

Smart home, smart living, Smart Nation trends in Singapore will continue in 2022 as observed in the PC/Computer Accessories and Smart Living/ Wireless categories. Singapore customers are digitally savvy and love their gadgets with 99% household access to desktops/tablets/laptops¹. We will likely see continued demand for smart phones, smart watches and fitness devices as well as their accessories. Work-from-home flexibility implemented by many companies² will likely continue to see stable growth for USB hubs, laptop stands and accessories³.

Stable growth

Online shopping categories that have reached a new post-pandemic baseline with stable growth propelled by new enduring habits or trends



Categories







Smart Living/ Wireless

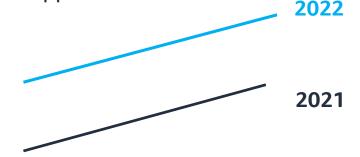
Source: 1. IMDA, 2020: https://www.imda.gov.sg/infocomm-media-landscape/research-and-statistics/Digital-Society; 2. Channel News Asia, 2022: https://www.channelnewsasia.com/singapore/crowds-office-areas-return-end-work-home-default-singapore-2412181; 3. Internal Amazon Singapore data 2020 vs 2021 comparisons in sales performance, growth and product impressions;

2022 Amazon Singapore customer trends: High growth categories

Personal hygiene and wellness at home trends in Singapore will continue in 2022 as observed in the **Health & Personal Care** category. Health vigilance will likely continue in Singapore in 2022, with personal hygiene shooting up to the second most frequently bought items in the pandemic¹. This will likely continue to drive high demand for face masks, detergents, vitamins and supplements and health measurement equipment. Aroma diffusers and scented oils will likely continue to see growth in 2022 with wellness-at-home habits continuing into the new year².

High growth

Online shopping categories with accelerated growth throughout the pandemic, and continue to show growth opportunities due to untapped demand



Categories



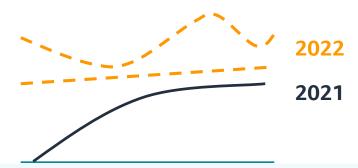
Health & Personal Care

2022 Amazon Singapore customer trends: New normal categories

At the start and throughout the pandemic, work-from-home trends in Singapore saw Singapore customers stock up on cooking supplies, baking supplies and USB cables and headsets¹. As more Singapore companies encourage back-to-office flexible arrangements and less time is spent at home, **Home & Kitchen** and **Electronics** demand may reach **new norms** and be dependent on whether habits endure as Singaporeans return to office. The beauty category saw skincare trending in 2021. Depending on how often Singapore customers return to malls and offices, **make-up** could see a potential comeback².

New norms / externally-driven growth

Online shopping categories that have seen increased digitalization trends driving sales during the pandemic, however 2022 outlook may be uncertain due to external factors (work-from-home, vaccinated travel lanes) or the category may have reached a new baseline if habits endure.



Categories







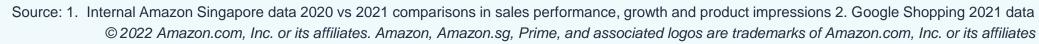
Home/ Household products



Kitchen Supplies



Electronics





Popular products on Amazon Singapore

Beauty Supplies



Face Wash



Face Moisturizer



Lotions



Hair Regrowth Treatment



Serums



Cloth Face Mask



Dishwashing



Health & Personal Care

Scales



Disposable Diappesbal Supplements



Shampoo



Masks



Creams



Body Groomers



Spot Treatment



Liquid Detergent



Procedure Masks



Scented Oil Diffuser



Toilet Tissues



Vitamins

Household Products



Children's Lighting



LED Strips



Desk Lamps



Markers Mirrors



Grow Your Own Kits



Hooded Bath Towels

Night Lights



Indoor -Outdoor



Printing and Stamping

Kitchen Supplies





Tongs

Hose Reels



Basting Brushes

Replacement

Filters



Blouses & Shirts

Sharpening

Stones



Drying Racks



Food & Dish Transport







Supplement Shakers



Popular products on Amazon Singapore

Smart Living/Wireless



Activity Trackers



Basic Cases



Cases



Main Charge Sortable Power Bank





USB Hubs



Internal Solid State Drives



PC/Computer Accessories

Laptop Stands



Graphic Cards



Graphic Tablets



Bands

Replacement Screen Protectors



Screen **Protector** & Foil



SIM-Free & **Unlocked Mobile Smartwatches Phone**



Computer Mice



Monitors



Laptops



Micro SD Cards



Routers

Electronics



Adapters



Continuous Output Lighting



External **Cables**



Extension Cords



Headsets



In-Ear **Headphones**



Lightning Cables



Over-Ear Headphones



Power Strips & Surge **Protectors**



USB Cables

Category spotlight: Smart Living/ Wireless



Key trends and Singapore customer insights to watch

Source:

- 1. Today, 2021: https://www.todayonline.com/singapore/explainer-singapores-first-5g-standalone-network-finally-here-whats-buzz-over-it-and-how
- 2. Statista, 2021: Global Consumer Survey
- 3. Statista, 2021: Singapore Digital Fitness and Wellbeing devices

Key trends that drive this category



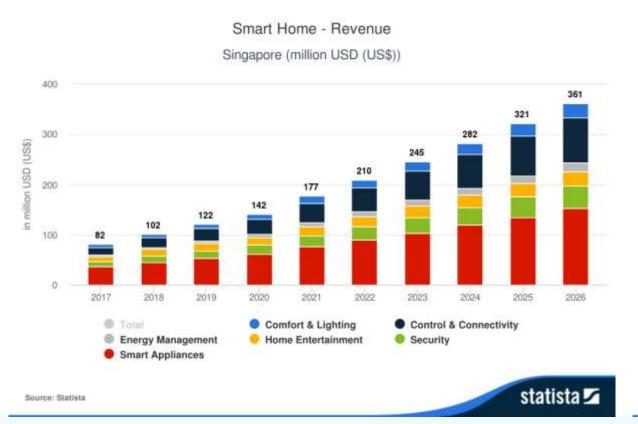
5G Network: In 2021, the first 5G standalone network was launched in Singapore. High-speed internet opens up the possibility of smart devices that can improve day-to-day activities¹

Smart home: Smart homes are on the rise. 59% Singapore customers use Smart home devices, mainly for entertainment in the form of smart speakers, TVs or streaming devices (39%), smart appliances (18%) and smart energy/lighting (17%)²

Digital wellness: Smart watches and fitness trackers are key products observing growth in the digital fitness category in Singapore³

Smart Living/Wireless: Singapore industry landscape

The Smart Home category is expected to reach 361 million USD by 2026. Considering the current moderate user penetration, long product replacement cycles and increasing 5G device connectivity, adoption will steadily grow in the next years. The digital fitness revenue sub-category is dominated by smart watches.



Digital Fitness & Well-Being Devices - Revenue by Segment Singapore (million USD (US\$)) n USD (US\$) 124.47 72.13 2017 2018 2019 2020 2021 2025 2024 Fitness/Activity Tracking Wristwear Smart Scales statista 🗸 Source: Statista

Source: Statista, 2021



Did you know?

Source:

- 1. Kantar, 2018: https://www.ceotodaymagazine.com/2018/02/ho w-to-extend-the-lifespan-of-your-smartphone/
- 2. Google Shopping research, 2021
- 3. CNBC, 2019: https://www.cnbc.com/2019/05/17/smartphoneusers-are-waiting-longer-before-upgrading-hereswhy.html
- 4. Statista Digital Market Outlook, 2010 to 2025
- 5. CNET 2021: an average user has at least 3.3 connected devices, one of the highest in the world.
- **6.** GovInsider, 2020: https://govinsider.asia/citizen-centric/how-singapore-is-using-wearables-to-design-health-campaigns-hpb/

- In the US, the average American upgrades their smart phone every 24 months. In Singapore, the average Singapore customer upgrades their smartphone every 12 months¹. For the Singapore customer, the upgrade cycle is the primary reason for purchase of consumer electronics.² The lifecycle of smart phones in Singapore will likely increase in line with global trends due to more SIM-only plans, and pricier new phone models.³
- Singapore has the highest smartphone adoption rate in the world. The current smartphone penetration rate in Singapore in 2020 was 88.4%, projected to reach 93.4% in 2025.4
 - The average Singapore customer has **3.3 connected** devices, one of the highest in the world.⁵
 - The Health Promotion Board in Singapore actively promotes the usage of smart watches and fitness trackers for Singapore residents to keep fit and get rewarded⁶

Category spotlight: Smart Living/ Wireless



Key trends and Singapore customer insights to watch

Popular products¹

Smart Living/Wireless











Activity Trackers

Basic Cases

Cases

Main Charge Sortable Power Bank











Replacement Screen Protectors Bands

Screen
Protector
& Foil

SIM-Free &
Unlocked Mobile Smartwatches
Phone

amazon.sg

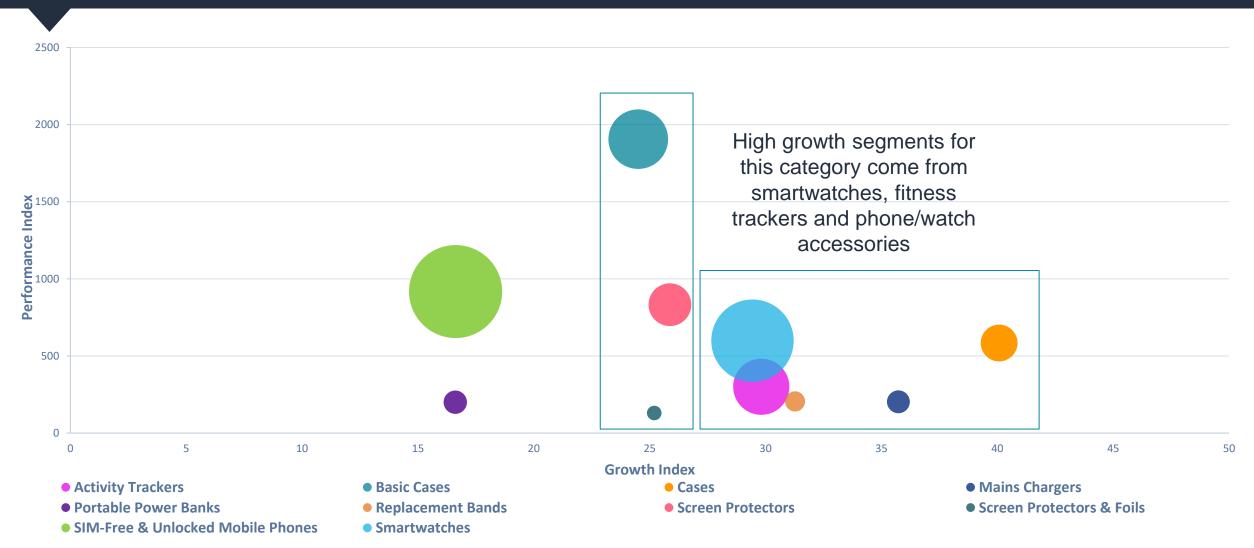
In terms of sales, smartwatches and activity trackers dominate this category. High growth items include phone cases, and phone/watch accessories (chargers, replacement bands).



Source:

- 1. Internal Amazon Singapore data Jan-Dec 2021
- 2. IPSOS SG customer study, 2021

Smart Living/ Wireless: Product types by sales performance index and growth index



- 1. Sales performance is measured by sales volume, units sold and product impression views from Jan-Dec 2021 Amazon Singapore data
- 2. Growth performance is measured by year-on-year changes in sales volume, units sold and product impression views from Jan-Dec 2020 vs Jan-Dec 2021
- 3. Size of bubbles reflect indexed revenue of item compared to others in same category © 2022 Amazon.com, Inc. or its affiliates. Amazon, Amazon.sg, Prime, and associated logos are trademarks of Amazon.com, Inc. or its affiliates



PC/Computer Accessories



Key trends and Singapore customer insights to watch

Key trends that drive this category



Smart nation: In 2020, 99% of households with children under 15 years old in Singapore had access to either a desktop, laptop, or tablet¹



Work from home/hybrid work:

From Jan 2022, many office workers will enjoy office-home flexibility arrangements with 87% of Singapore employers allowing their staff to work from home, compared to the global average of 79%²

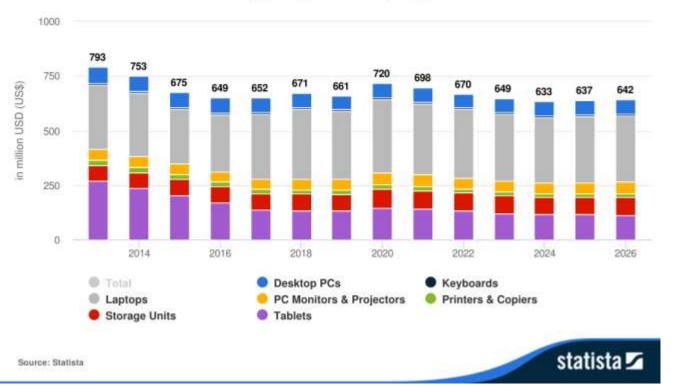
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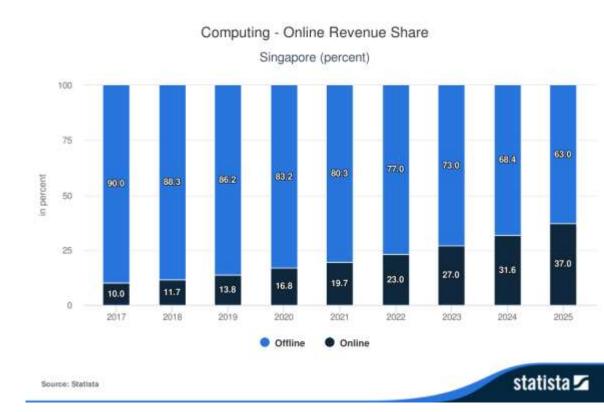
- 1. IMDA, 2020: https://www.imda.gov.sg/infocomm-media-landscape/research-and-statistics/Digital-Society
- 2. Channel News Asia, 2022: https://www.channelnewsasia.com/singapore/crowds-office-areas-return-end-work-home-default-singapore-2412181

PC/Computer Accessories: Singapore industry landscape

The PC and Computer Accessories category is a stable growth category in Singapore. The existing high adoption of computers, tablets and laptops is reaching saturation point, so shifts to mobile/wireless devices and online purchases are key trends to watch. Online revenue share, is still increasing from 19.7% in 2021 to Computing - Revenue by Segment a projected 37% by 2025.







Source: Statista, 2021



Popular products¹

Category spotlight: PC/Computer Accessories



Key trends and Singapore customer insights to watch

PC/Computer Accessories



USB Hubs

Computer

Mice





Stands

Laptops







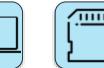


State Drives



Monitors



















Micro SD Cards

In terms of sales, laptops and and storage devices dominate this category. High growth items include graphic cards and internal Solid State Drives (SSDs).

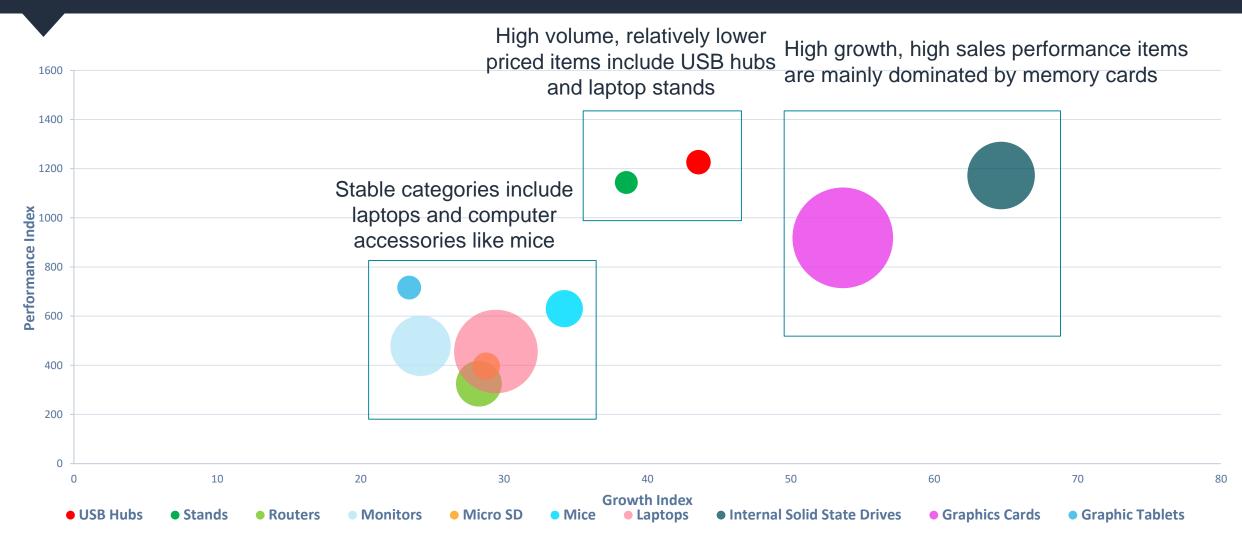
Did you know that Amazon SG customers are more likely to be tech-savvy/early tech adopters²?

Source:

- Internal Amazon Singapore data Jan-Dec 2021
- IPSOS SG customer study, 2021



PC/Computer Accessories: Product types by sales performance index and growth index



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Health & Personal Care



Key trends and Singapore customer insights to watch

Source:

- 1. Statista, 2020:
 - https://www.statista.com/statistics/1129612/singapore-main-products-frequently-bought-from-e-commerce-sites-covid-19/
- 2. Channel News Asia, 2021:

https://www.channelnewsasia.com/watch/145-new-gymsopened-last-six-months-increase-membership-sign-upsothers-video-2008126

Key trends that drive this category

Personal and public hygiene: Mask mandates and vigilance towards COVID 19 new variants will see continued high demand for personal hygiene and health products. The start of the pandemic in 2020 saw personal hygiene shoot up to the second most frequently bought items online in Singapore¹

Fitness & health consciousness:

Despite Singapore's small size, the Singapore populace is very health conscious, spurred on further by the pandemic. Even in the pandemic during the 1H 2021, 176 new gyms popped up in Singapore with rising demand for gym memberships². This also has spillover effects to supplements and vitamins, and health scales demand.



Category spotlight: Health &



Key trends and Singapore customer insights to watch

Source:

- 1. Statista, 2020: https://www.statista.com/statistics/1129612/singaporemain-products-frequently-bought-from-e-commerce-sites-
- 2. Channel News Asia, 2021: https://www.channelnewsasia.com/watch/145-new-gymsopened-last-six-months-increase-membership-sign-upsothers-video-2008126

Popular products¹











Cloth Face Mask

Dishwashing

Scales

Disposable Diappesbal Supplements











Toilet Tissues



Vitamins

amazon.sq

Vitamins, fabric face masks, cleaning detergents and toilet tissues form the bulk of growth and performance of this category.





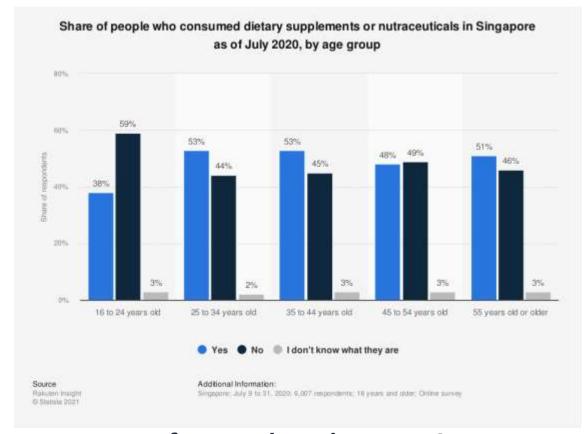
Did you know?

Source:

1. Rakuten, 2020: https://insight.rakuten.com/inquiry/

2 Statista, 2020: 2,974 respondents; 16 years and older; among 1,779 female and 1,195 male respondents who consumed dietary supplements; Online survey

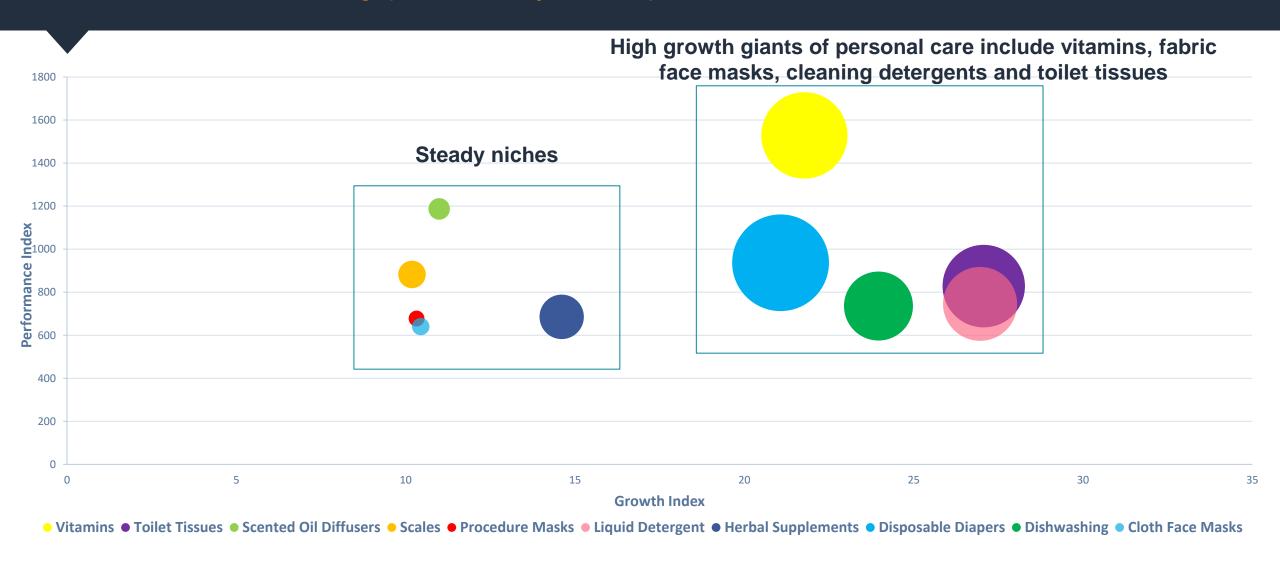
Supplements are taken in Singapore evenly across all age groups.



- 53 percent of respondents between 25 to 34 years old and between 35 to 44 years old respectively, stated that they took dietary supplements (vitamins or herbal supplements)¹
- 64% males and 67% females take supplements daily²



Health & Personal Care: Singapore industry landscape



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Beauty supplies



Key trends and Singapore customer insights to watch

Source:

1. Channel News Asia, 2022:

https://www.channelnewsasia.com/singapore/work-home-return-office-1-jan-vds-2378516

Key trends that drive this category

Opening up of social activities: From Jan 2022, Singapore will no longer default to work-from-home as the norm, which possibly could drive make-up categories upwards, while skincare has reached a newnorm following wellness trends in 2021.

5 key beauty trends drive demand:

- Clean beauty
- Products with Asian ingredients/K Beauty
 - Indie Brands
 - Specific skincare needs
 - Men's skincare



Singapore beauty industry trends to watch¹



CLEAN BEAUTY

Greater awareness of organic and natural products that are ethical and sustainable. 35.6% of Singapore customers believe that products derived from natural ingredients are more effective²



PRODUCTS WITH ASIAN INGREDIENTS

Korean products and other Asian skincare brands are gaining traction



INDIE BRANDS

Independent brands continue to thrive- as customers seek ways to express their individuality, originality and authenticity.

Source: 1. International Trade Administration, 2021: https://www.statista.com/statistics/1219050/singapore-perceptions-on-effectiveness-of-natural-skincare-products/



Singapore beauty industry trends to watch



SPECIFIC SKIN NEEDS

Since the pandemic, there is a rise in acne and skin issues associated with wearing masks. More interest in skincare infused with probiotics and vitamins.



MEN'S SKINCARE

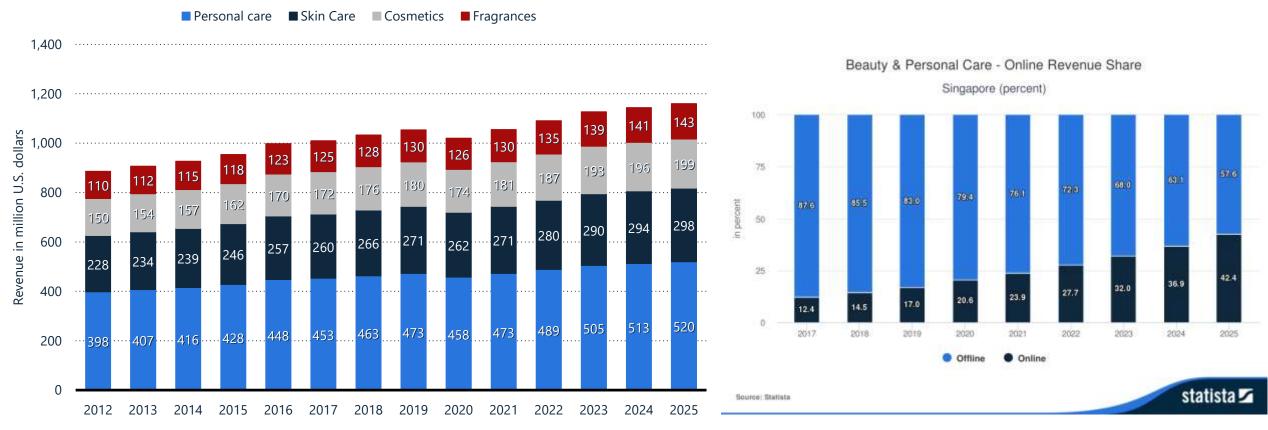
Men are spending more on skincare, some as high as USD 296/month on grooming

Source: International Trade Administration, 2021: https://www.trade.gov/market-intelligence/singapores-beauty-and-personal-care-market



Beauty supplies: Singapore industry landscape

The beauty category in Singapore is growing year-on-year despite a drop in 2020 due to the impact of the pandemic. While growth trends for make-up and cosmetics will depend heavily on the gradual opening up of office and social activities, online growth is still strong with online revenue share expected to reach 42.4% by 2025. Singapore shoppers are premium shoppers, with most spending SGD 50 – SGD 199 on skincare per shopping trip. 60% spend from SGD 50 - SGD 199 on make up per shopping trip.





Category spotlight: Beauty supplies



Key trends and Singapore customer insights to watch

Popular products¹

Beauty Supplies











Face Wash

Face Moisturizer

Lotions

Hair Regrowth
Treatment

h Serums











Shampoo

Masks

Creams

Body Groomers

Spot Treatment

amazon.sg

The category is dominated by skincare and haircare products in 2021. Given more Singapore customers will likely return to offices, travel and social activities in 2022, makeup could see a comeback.

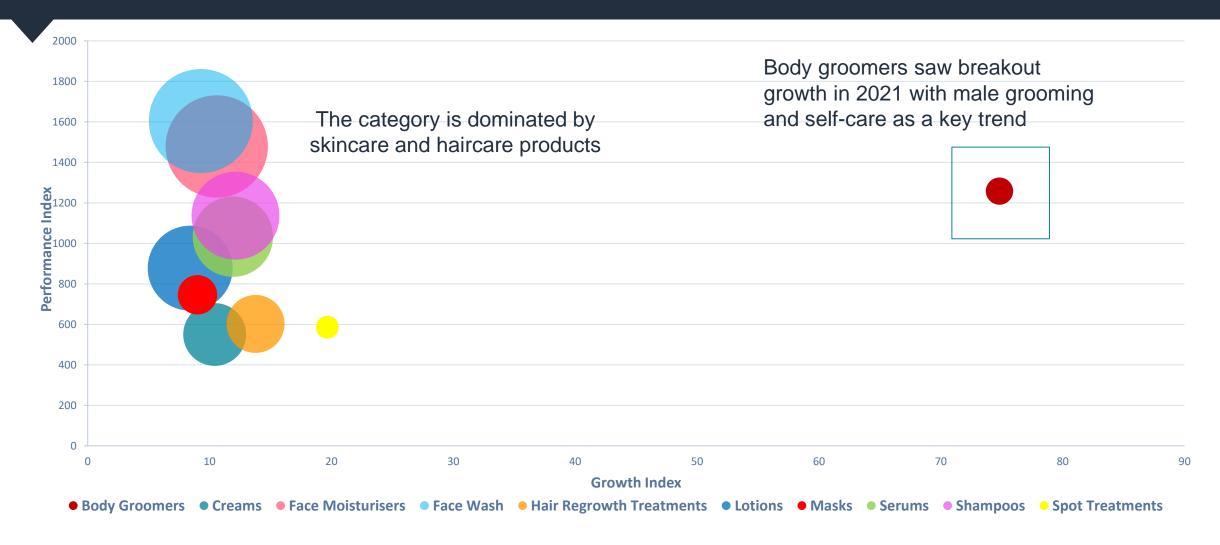
The top 3 skincare and beauty drivers of purchase are: 1) deals and discounts 2) recommendations from others 3) wanting to try a new brand². Compared to other categories, recommendations are much stronger driver of purchase, hence sellers should prioritize maintaining positive and helpful reviews for this category.

Source:

- 1. Amazon Singapore 2020-2021 internal data
- 2. Google Shopping data, 2021



Beauty supplies: Product types by sales performance index and growth index



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Home/ Household products



Key trends and Singapore customer insights to watch

Source:

1. Yahoo, 2021: https://sg.news.yahoo.com/smart-lighting-market-growth-trends-162000460.html

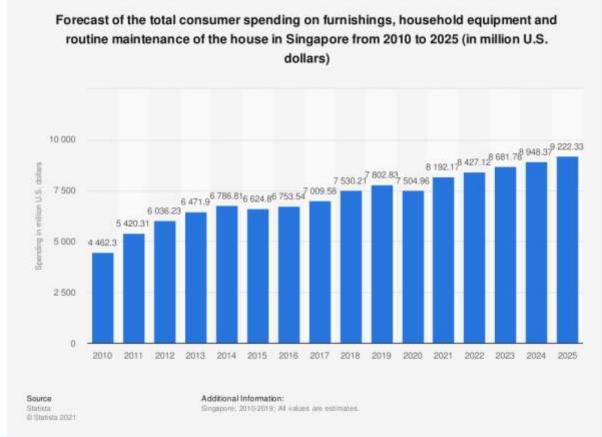
Key trends that drive this category

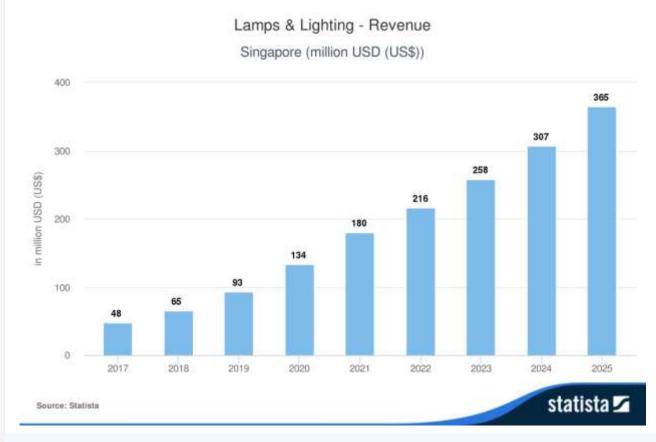


Smart Lighting: Technology advancements have lowered the cost of LED lights which are more energy efficient as well. Increasing disposable income has also created demand for LED smart lights that come in various brightness levels and colours, and that can be controlled via smart home apps. ¹

Home/Household Products: Singapore industry landscape

The Home/Household product category is an externally-driven growth category tied to the pandemic work-from-home trends. Overall, the household equipment and routine maintenance category is still expected to increase till 2025. The lightings sub-category is a fast growing sub-category with revenue expected to double by 2025 from 2021 revenue, and annual growth rate (CAGR 2022-2025) of 19.08%. Online penetration of total revenue will increase from 21.5% in 2021 to 34.5% by 2025 in the lighting sub-segment.





Source: Statista, 2021



Home/ Household products



Key trends and Singapore customer insights to watch

Popular products¹

Household Products







LED Strips



Desk Lamps



Car Markers



Grow Your Own Kits



Mirrors



Hooded Bath Towels



Night Lights



Indoor -Outdoor mat



Printing and Stamping

amazon.sg

Lighting solutions dominate top performers in this category. With more time spent at home, indoor growth kits for plants is a new entrant.

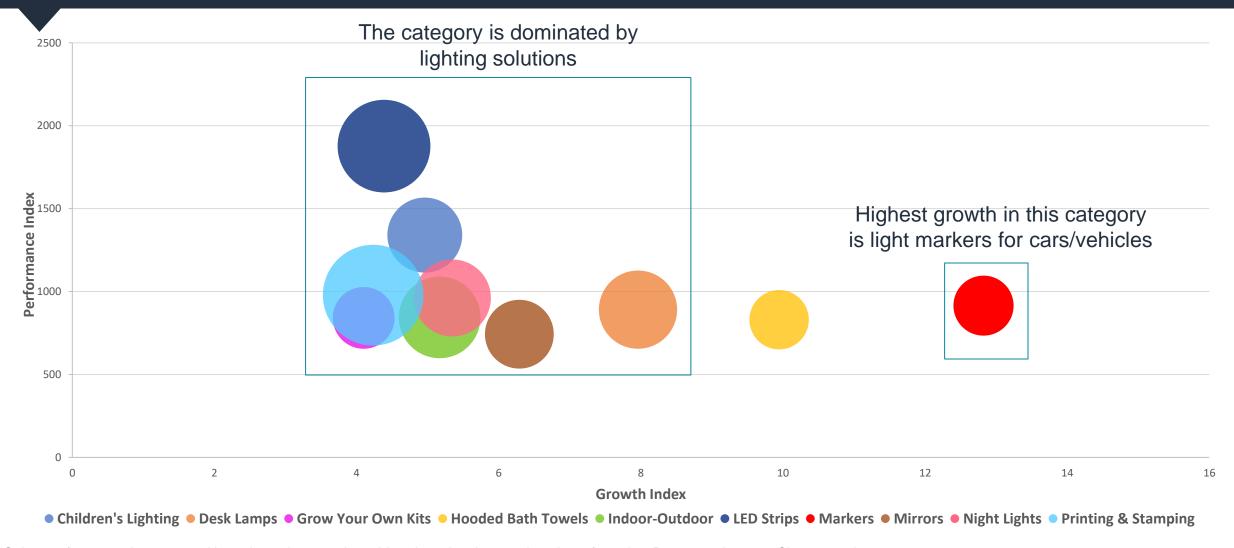


Source:

- 1. Internal Amazon Singapore data Jan-Dec 2021
- 2. IPSOS SG customer study, 2021



Home/Household Products: Product types by sales performance index and growth index



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Kitchen Supplies



Key trends and Singapore customer insights to watch

Key trends that drive this category



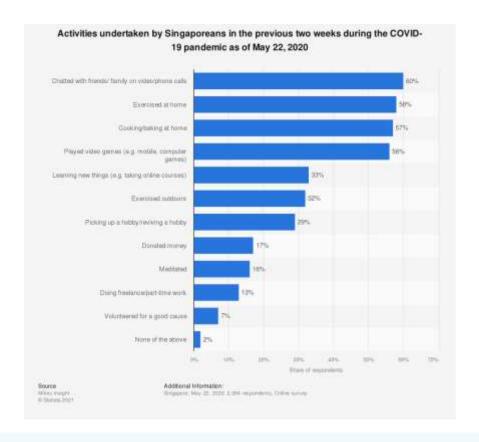
Aspiring Home Cooks: Due to lockdown restrictions, most Singaporeans sought ways to find entertainment which included picking up new skills (33%) or cooking/baking (57%). As more of the Singapore workforce returns to the office in 2022 (up to 50% from Jan 2022), these hobbies may see new norms of growth.

Source:

1. Statista, 2021

Kitchen Supplies: Singapore trends

The Kitchen Supplies category gained popularity due to the pandemic with 57% of Singaporeans spending their lockdown experimenting in the kitchen and 58% exercising at home. With more people returning to the office due to hybrid working arrangements, these hobbies could form a new normal purchase pattern in 2022.





Category spotlight: Kitchen **Supplies**



Key trends and Singapore customer insights to watch

Popular products¹

Kitchen Supplies











Barbecue Tongs

Basting Brushes

Blouses & Shirts

Drying Racks

Food & Dish **Transport**













Hose Reels

Replacement **Filters**

Sharpening Stones

Sports Water Bottles

Supplement Shakers

amazon.sq

In terms of sales performance index, sports water bottles dominate this category. High growth items include food & dish transport and cooking accessories such as barbecue tongs.



Source:

- Internal Amazon Singapore data Jan-Dec 2021
- IPSOS SG customer study, 2021

Kitchen Supplies: Product types by sales performance index and growth index



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Category spotlight: **Electronics**



Key trends and Singapore customer insights to watch

Source:

1. Channel News Asia, 2022: https://www.channelnewsasia.com/singapore/work-home-return-office-1-jan-vds-2378516

Key trends that drive this category

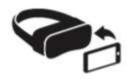


Work from home/hybrid work:

From Jan 2022, many office workers will enjoy office-home flexibility arrangements with up to 50% returning to the office ¹







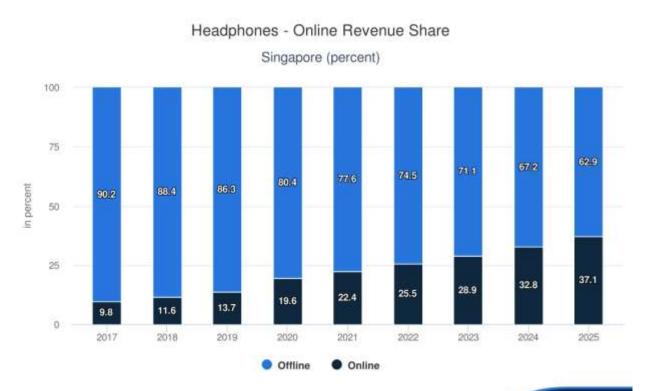
Entertainment at home:

With travel lanes opening up but on a limited basis as of Q1 2022, entertainment at home trends are likely to persist, with music and gaming also driving demand for headsets.



Electronics: Singapore industry landscape

The Electronics category was driven by work-from-home trends due to the pandemic. With more companies encouraging hybrid work arrangements, the demand for home office accessories, cable management and devices such as headphones could reach a new norm. For headphones, online revenue share is expected to grow to 37% of total revenue by 2025.



As gaming is on the rise in Singapore, headsets and headphones for gaming accessories are opportunities to capture. 41% Singapore gamers play daily with 51% reported to spend more due to COVID-19 on gaming.

statista 🗸

Source: Statista, 2021;

Source: Statista

Category spotlight: Electronics



Key trends and Singapore customer insights to watch



Source:

1. Internal Amazon Singapore data Jan-Dec 2021

Popular products¹











Adapters

Continuous Output Lighting

External Cables

Extension Cords

Headsets











In-Ear Headphones

Lightning Cables

Over-Ear Headphones

Power Strips & Surge Protectors

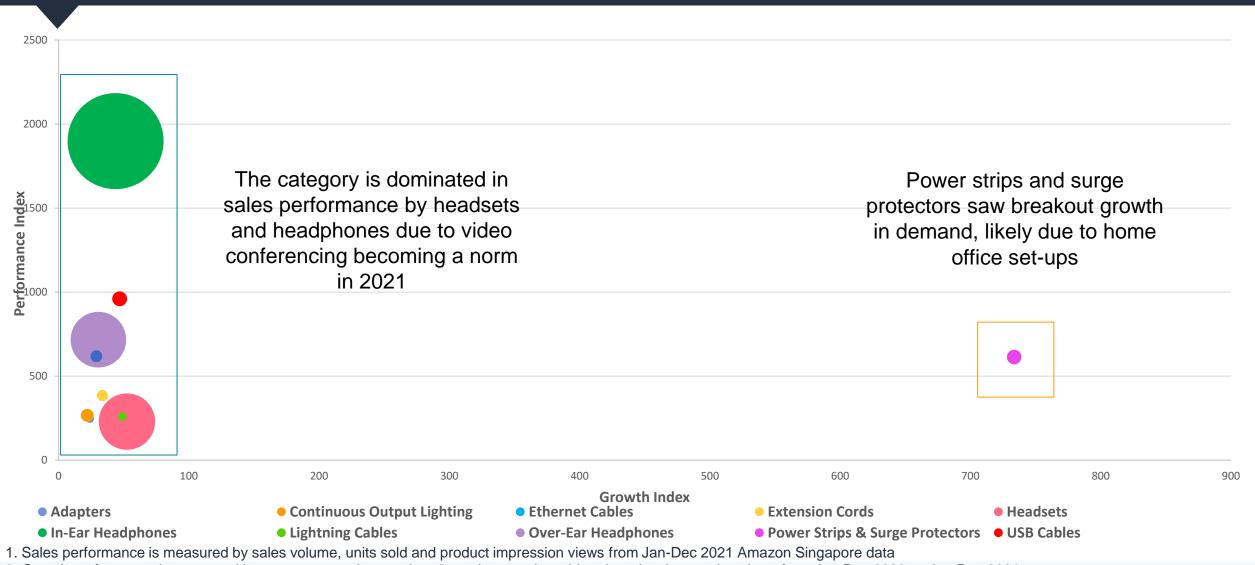
USB Cables



amazon.sg

In terms of sales, headsets and over-ear headphones dominate this category. High growth items include power strips & surge protectors.

Electronics: Product types by sales performance index and growth index



^{2.} Growth performance is measured by year-on-year changes in sales volume, units sold and product impression views from Jan-Dec 2020 vs Jan-Dec 2021

3. Size of bubbles reflect indexed revenue of item compared to others in same category

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