

How can



become the leading online retailer for Home and Living products in Thailand?

Leverage Lazada's key strengths

Understand target customer segment

Revolutionise Home and Living e-commerce

INTRODUCTION LAZMALL MVP BETTER THAN REALITY TIMELINE IMPACT 2



Lazada's key strengths as a leading e-commerce ecosystem...



"positions them well to differentiate Lazmall from its competitors and be the leading Home and Living online retailer

Big Box e-commerce retailers:







Superior logistics fulfilment in reach and speed

Exclusive furniture stores:

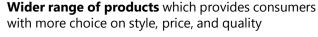












More **customer reviews** available for consideration

Source: Case files, Bangkok Post, Lazada Investor Day 2020

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Focusing recommendations on the millennial (20-35 years old) demographic will generate the most impact

61.9%

of Millennials **shop online**, compared to 32.6% of Generation X (37-56 y.o.) and 5.3% of Baby Boomers (57-76 y.o.)



Millennials are trendy, and purchase **new home and living items** for their rooms and new homes **more frequently**



Culturally, Thai millennials often make **household purchasing decisions** to take care of their families

Low Risk

Authenticated products, and convenience to return at no cost **Convenience Experience** Ease and speed of Ability to **feel** the product and **visualise** it before purchase purchase and delivery **Price** Reviews Millennial decision Finding the competitive Access to a variety of factors for Home and comparisons and getting the customer opinions and photos Living shopping best deal

Source: Case files, Janio, SCB Intelligence Center

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How can LazMall become the leading online retailer for Home and Living products in Thailand?

REVOLUTIONISING THE CUSTOMER EXPERIENCE



LAZADA BETTER THAN REALITY

Marketing campaign to promote Lazada as the number one **go-to marketplace** for Home and Living by showcasing Lazmall's **seamless customer journey** and introducing the 'LazHomes' game which rewards players with LazCredits

19% Market Share by 2025

14%

Revenue increase by 2025

B340m 5 Year NPV

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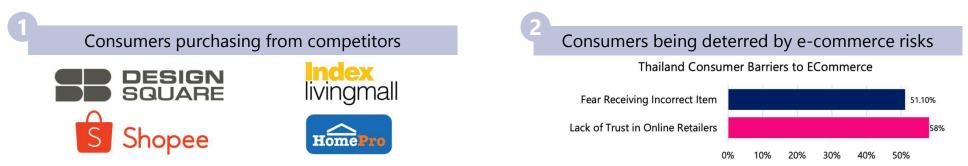
IMPACT



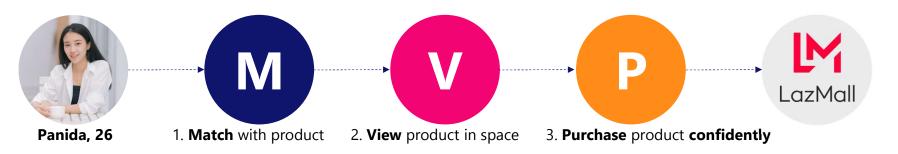


Lazada can differentiate itself through solving key Thai e-commerce customer concerns

There are two risks to Lazmall's market share



Analysing Thai Consumer Purchasing Experience Opportunities for Lazada



Lazada can increase furniture penetration through solving key Thai-specific eCommerce concerns



Lazada has an opportunity to improve furniture eCommerce uptake by improving its user review tools

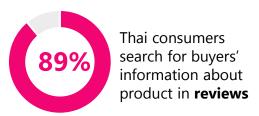


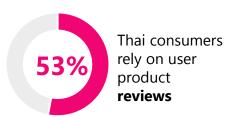




Current Offering Provides Opportunity for Improvement

Thai Consumer Analysis







Strong buyer volumes offering reviews ensures quantity of feedback

Lack of quantitative metrics to filter and compare qualitative feedback

With in-depth **product descriptions**, and **user reviews**... my **sales increased 30%.**

- Praponsak Kumpolpun, L'Oreal **Thailand** Senior E-Commerce Manager

Recommendation

We propose improving the user review features to offer more value and useful detail to consumers like Panida to engage with

Source: AusTrade Thailand Ecommerce, Deloitte Thailand

Adding reviewer metrics to the Lazada app will generate significant value to prospective Thai customers



Review metrics are essential to useful reviews



Adding **review metrics** function to the toolkit that the Lazada community of reviewers can utilize



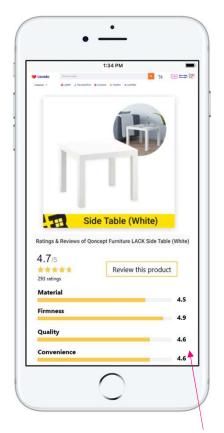
Key metrics which define furniture and homewares products can be reviewed upon

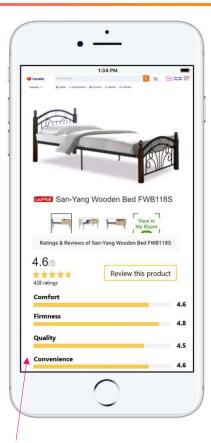


Customers will be able to **search, sort and match** with the products that match the best with their chosen criteria

Key review metrics will include...







Customers will be able to **search**, **sort** and **match** with the products that match the best with their chosen criteria

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By ensuring that consumers can better match their preferences to products, Lazmall can drive more customers onto their platform for Home and Living products









GIVES THEM WHAT THEY WANT

Caters to **Thai consumer** desire for user-generated **reviews**

Provides **new tools** to **quantify** buyer opinions on products

Reduce decision-making **barriers** for Thai consumers by providing peers' reviews

CREATING DIFFERENTIATION



Distinguishes Lazada as the richest source of homeware and furniture e-commerce reviews

Leverages Lazada's leading **vast existing reviewer base** will magnify the quantity of data compared to other stores

DRIVING BUYERS TO LAZMALL

Drives Thai consumers towards **Lazmall** and **away from competitors**

Drives purchasing through **reducing perceived risk**, increasing information about the real products

Increased **speed** and **convenience** of sorting for appropriate home and furniture goods

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Creating an augmented reality product visualization tool in the Lazada App will mitigate a key pain point of furniture shopping for Lazmall customers





2. View



P

Thai eCommerce users prefer to visualise furniture

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Key **risk** for purchasing furniture online is whether it will fit in a customer's space



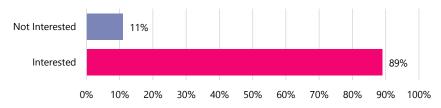
Visualizing homeware and furniture is a key reason many Thai consumers **prefer in-store** experience



Reduce risks and **increase certainty** when purchasing homewares and furniture online

There is strong evidence of AR support in Thailand

Thai Consumers Interested in AR Shopping



Source: Inside Retail, Forbes

Lazada can solve this with an AR product visualization tool



Consumers access an augmented reality viewer through Lazada app



Consumers can **visualize** the product in their own space



Provides **spatial-measurement** to ensure the size-appropriate products are purchased

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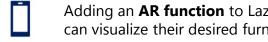
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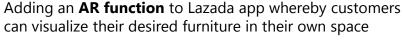
IMPACT



LazadAR will enable consumers to visualize and measure furniture options within their own space

LazadAR 1.0 Launch







Phone camera will provide to-scale measurements to ensure the product fits in their space



Customers can **re-evaluate** their choices and confirm whether they have made the best choice

Will be developed by Lazada through...

Leveraging Alibaba's investment into AR company **Perfect Corp**

TaoBao's **Taobao Buy** software capabilities

Capitalising on key learnings from Lazada x L'Oreal AR collaboration

Product scans will be provided by suppliers and by Lazada through acquired technologies

Source: Inside Retail, Forbes

Panida's coffee table choice







3. Evaluate

2. Place the product

1. Choose your product





LazadAR can maintain its competitive edge by further developing the tool further in the future

LazadAR 2.0



Continuing to **innovate** the LazadAR platform in the medium-term to offer more functionality



Developing the AR platform to include **whole-room** scans to plan out an entire room at once



Customers will be able to **design** their room from start to finish, leveraging an immersive AR room planner







1. Scan whole room

2. Design space

3. Save and buy

Impact of Lazada's Augmented Reality Tool





Reducing risks and barriers for millennials to buy furniture online



Drive confidence in purchasing online, driving sales for Lazada businesses

Source: Deloitte Thailand

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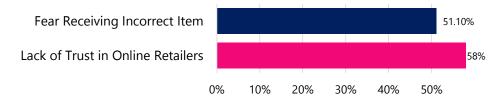


Lazada can enhance Thai consumers' willingness to purchase by streamlining the returns process

3. Purchase 1. Match 2. View

What Thai Consumers Want

Thailand Consumer Barriers to ECommerce



Panida and consumers see significant risks...

Big-ticket furniture items are viewed as **investments** by Thai consumers and are rarely replaced

High perception of **risk** when purchasing expensive items online with no return guarantee

Simplified returns solutions encourage consumer purchases

Lazada can foster confident purchasing by Thai consumers

Complication

Under current policy, items must have original seal and no damage

However, furniture and homewares items must be **opened** to try them

New Lazmall Return Guarantee

Items can be opened and still returned within the time period

All furniture items will be eligible for Lazada's signature bulky item pick-up

Lazada can significantly enhance consumer purchase motivation by

Source: Deloitte Thailand

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Match

Improving customers' product research process by adding key metrics to reviews



View

Augmenting customer experience through LazadAR app feature for augmented reality



Purchase

Reducing barriers preventing Thai consumers purchasing through easier return policy

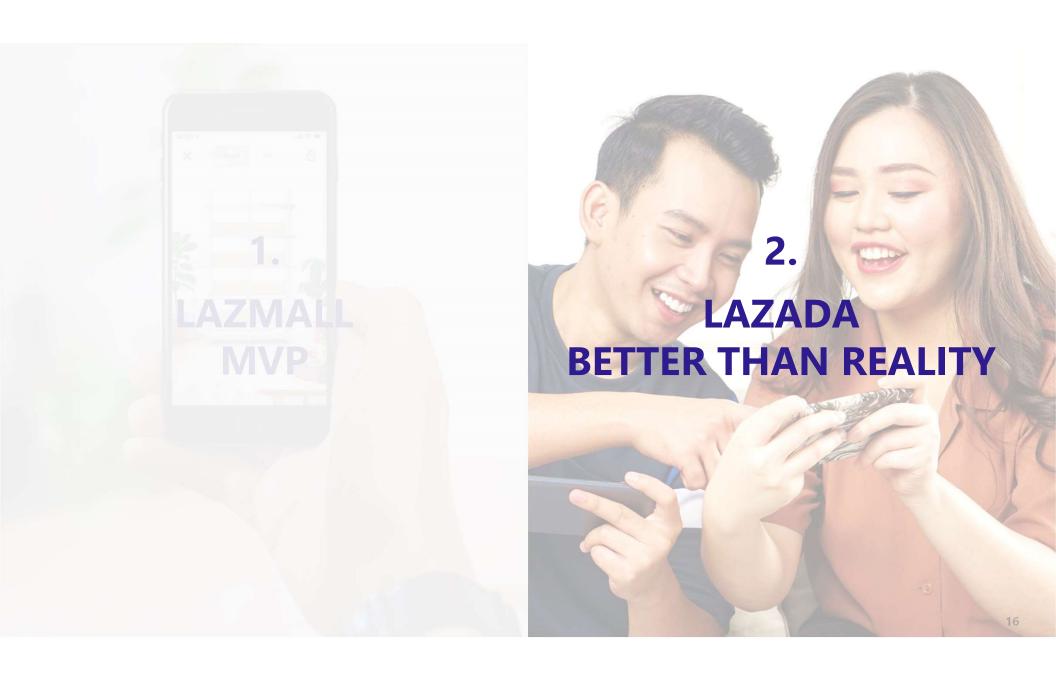




Happy Lazmall Customer

Lazmall will be the \mathbf{M} ost \mathbf{V} aluable \mathbf{P} layer of online furniture shopping in Thailand

Source: Twitch TV



By clearly identifying the key values of Lazmall's target market, Lazmall can leverage their value propositions to present their brand as the go to lifestyle shopping platform



Millennials Key Values



Variety: They compare among the variety of products available to select the best option for them



Applicability: 80% of millennials say they will more likely purchase a brand if they can 'experience it first'



Societal Views: 90% of consumers would rather listen to their peers recommendations than TV ad

Lazmall Value Proposition

100% **Authenticity** Guarantee Policy

Over 6,000 international and local brands

Customer-centric focus

Source: Marketingignite, Lazada, Forbes

Better Than Reality Marketing Campaign

Messaging:

Promoting Lazmall's core value propositions to ensure clear communication

Authenticity Product Range

Customer-centric

Initiatives:



Social media campaign



LazHome design game

Goal:

Position Lazmall as the number 1 go-to Home and Life shopping e-commerce platform in Thailand



BETTER THAN REALITY



Branding communication mechanisms

If brand communication is seen as 'human', customers are 1.6 times more likely to make a purchase and 1.8 times more likely to recommend that particular brand.

- Forrester Consulting



Short Video Clips

Short and engaging 15-30 seconds

Relatable to the everyday millennial

Creating a story which highlights Lazmall's **customer-centric approach**

Medium of Communication



92% Of mobile use Thailand have

13.7

INTRODUCTION

Users in Thailand are between the ages of 25-34.



most downloaded app in Thailand

User downloads in Thailand



80

+ annual active users

20% Growth in YoY conversion rate

Source: Lexiconthai; Lazada; Forester

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By creating a short compelling 'humanized' story, Lazmall can showcase their customer-centric shopping experience to promote Lazmall as the go-to Home and Life shopping platform in Thailand



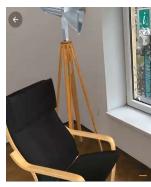












Everyday Millennial

Scrolling through Lazmall

Utilising Augmented Reality

Purchasing Lazmall product

Instant Delivery

Beautiful Home



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Incorporating gamification with the introduction of 'LazHome' will drive customer engagement through utilising Lazmall products to 'design your dream home'



88%

would opt for the **brand** that **offers** a **gamified** customer **experience**

Why Gamification?

the idea of being **fun, engaging, and playful**is important to Thai culture

85%

would be willing to pay slightly higher prices for a gamified experience













Envision

Create

Review

Share

e Compete

Source: Masci-sis

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Analysis has shown that marketing campaigns shaped by tangible value, store credit and competitions have fostered ideology of being 'front of mind' in e-commerce purchasing decisions



Key drivers Why are these key drivers? Incorporated into LazHome LAZWATCH, LAZSHOP, LAZWIN **Trust Tangible Value** Combination of **reviews** from other 70% of consumers think that consumers and LazLive influencers advertising is often untruthful Sales Credit and Through LazHome consumers can earn 88% of Thai consumers aged 24 – 32, **credit** and **discounts** that can be spent said they would more likely buy Discounts directly on LazMall brands with a reward system **Engagement** Thai sentiment towards the word With the introduction Competition 'play' with the idea of being fun, a leadership board engaging and playful - something that sits closely with Thai Culture

Through incorporating and capitalizing key purchasing decisions into the LazHome there are mutually beneficial outcomes for the consumer and LazHome

Source: Diva-portal, Dombrowski Study; Masci-sis



Consumers

Playful

A **fun** way to **discover** and plan your dream home to assist in the consumers purchasing decisions

Humanised

Directly applicability and tangibility to the consumers current lifestyle

Comparability

Allows for **direct** and easy comparison of products and other consumer interests

Brands

By utilising Lazada's current branding team to go out and pitch directly to brands, the key message should focus on....

Environmental Uncertainty

Unique Reach

Greater exposure

Source: Bangkok Post

With the rise and presence of COVID-19 there is uncertainty with the longevity of brick and mortar stores, and it is pivotal that brands embrace e-commerce

Through augmented reality and gamification, Lazmall reaches customers in a unique and memorable way that will enhance the customer experience

Cross-utilization of Lazada platforms, LazGames and LazLive, will provide brands with

exposure to greater markets

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Emphasis on Lazmall's value propositions of a customer centric focus to create a customer journey that will put Lazmall front of mind in Home and Lifestyle purchases











Ploy, Age 27 is scrolling through her Facebook newsfeed

Ploy comes across our short clip that illustrates Lazmall tangibility through Lazmall

Downloads Lazada to then be able to create her profile and engage with LazHome

As she is creating her dream home, she notices a coffee table that she has recently thought of purchasing

Emphasis on Lazmalls value propositions of a customer centric focus to create a customer journey that will put Lazmall front of mind in Home and Lifestyle purchases



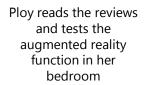












Seeing the physical resemblance in her room, Ploy purchases the coffee table using credits earnt from LazHome Ploy's coffee table is delivered the next day and is now displayed in her beautiful home The combination of these actions raise the brand presence and create tangible financial value for Lazmall





Greater customer reach

Emphasising Lazmall's strengths through engaging graphic designs and short video clips on growing social media platforms.

245k
Additional purchase transactions generated by 2023



2

Increase customer engagement

Gamifiying LazHome to create a playful and personalized experience maintaining engagement via leaderboards

30k
LazHome player base



3

Broader brand awareness

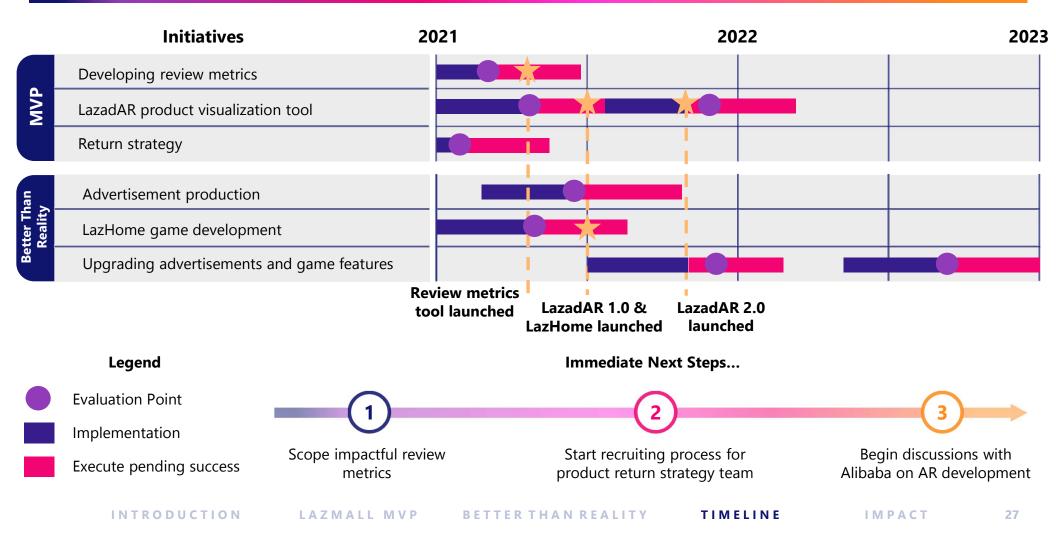
Directly pitching to brands demonstrating with environmental uncertainty, unique methods of reach and cross-utilisation of platforms, Lazmall has significant value

\$690mTotal marketing derived revenue by 2025



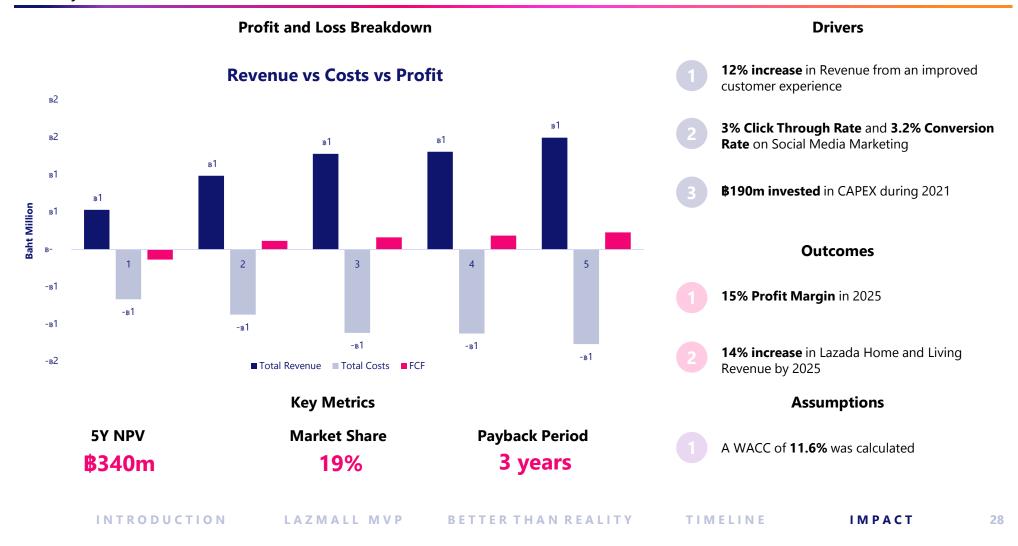


Lazada will be able to implement Lazmall MVP and Better Than Reality throughout the next three years.



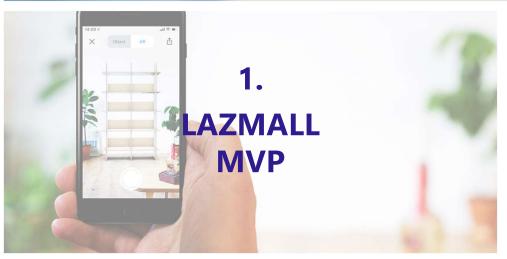
Lazada can expect strong financial results through the implementation of Lazmall MVP and Better Than Reality





How can LazMall become the leading online retailer for Home and Living products in Thailand?

REVOLUTIONISING THE CUSTOMER EXPERIENCE





19% Market Share by 2025

14%

Revenue increase by 2025

B340m 5 Year NPV

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- 38. Alibaba AR investment Perfect corp
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- 41. Thai consumer barriers to online shopping
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- 49. What platforms do Thai Millennials play games on?
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- 52. Case Study: The success of gamification in Thailand
- 53. What providers can help support the production of

- LazHome?
- 54. Social Media Penetration
- 55. Customer Experience Impact on Revenue
- 56. Alibaba OPEX Benchmarks
- 57. Thailand Influencer Marketing
- 58. Thailand Millennial Gamer Statistics
- 59. Thailand E-Commerce ATV
- 60. Marketing Funnel Rates

Financial Assumptions

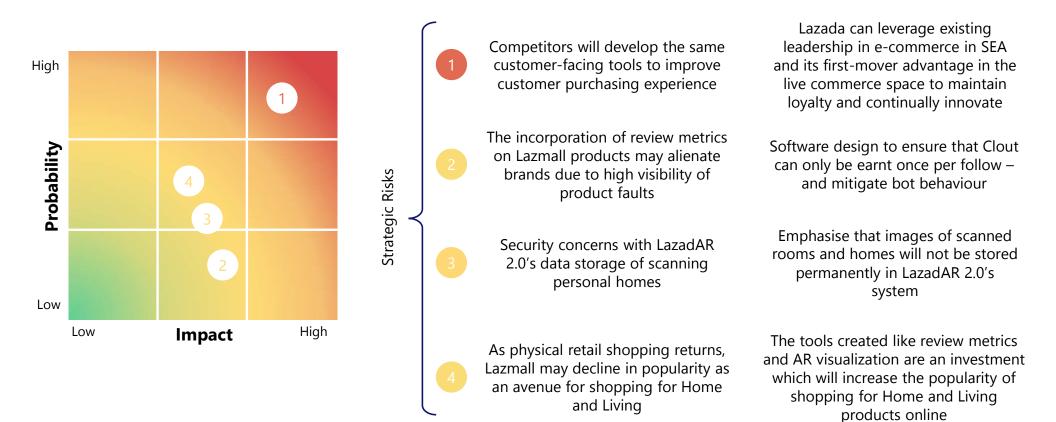
- 61. WACC Calculation
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- 77. Influencer Return, LazHome Player Conversion, Product Returns and Brand Conversion Sensitivity Analysis



Impact		7	Impact	
	Mitigating pain points in consumer purchasing experience		Financial impact	40%
	Social media marketing	3	Increase in sales	30%
Create an AI shop attendant / interior	Creating a room design		Increase in LazMall visits and browsing	10%
designer	game		New brands onboarded	20%
Sponsoring a home makeover reality show to feature LazMall products Create artificial influencer profile to market LazMall Home and Living products			Feasibility	
	Tool to compare and contrast		Cost of establishment	35%
	products on LazMall		Use of existing capabilities	30%
		Feasibility	Uptake	35%

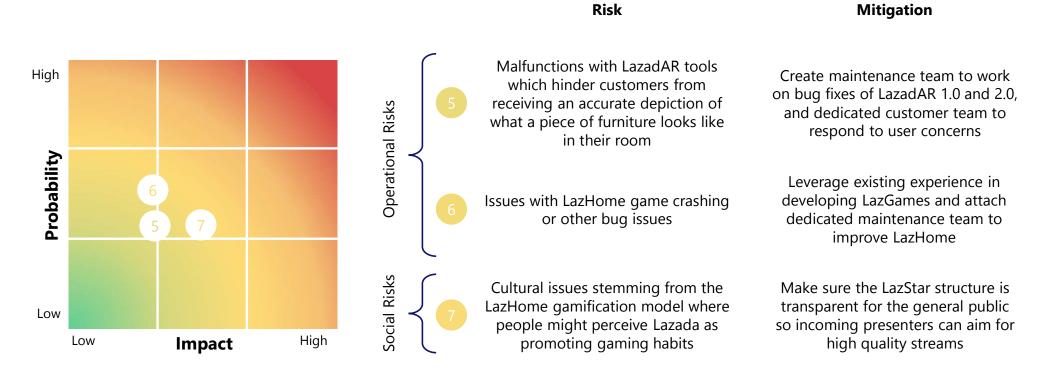


Mitigation



Risk





Who are Lazada's main competitors?

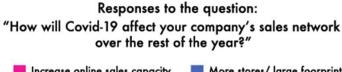


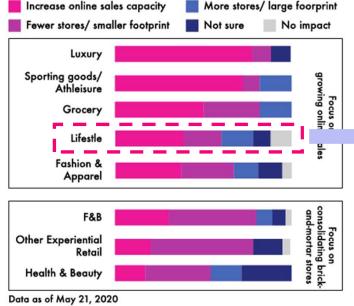
	LAZADA LAZADA	Shopee	11ST >	LOOKS	Konvy	Kaidee KAIDEE	WELOVE SHOPPING WELOVESHOPPING	TARAD.com
BUSINESS MODEL	B2B2C	B2B2C	B2C	B2C	B2C	C2C	C2C	C2C
PRODUCT SELECTION	All category	All category	All category	Fashion	Beauty	All category	All category	All category
AVERAGE VISITORS PER MONTH	63.6M	6.1M	18.6M	806K	6M	12.7M	6M	4.5M
SELLER COMMISSION	1-10%	No commission	5-10%	N/A	N/A	N/A	2-10% plus transaction fees 3%	110-570% plus payment service fee 2.5-5%
LOCAL BUSINESS REQUIRED	No	No	No	No	No	No	No	No
IN-HOUSE LOGISTICS	Both in-house and thrid party - kerry express, thai post, LEX, Yusen Logisitcs, CJ Logisitics, DHL, TP Logisitcs, V Cargo	Third-party - Thai Post, Kerry Logistics, DHL	Third party - Kerry express, Thai Post, aCommerce, DHL	Third-Party	Third-party - Thai Post, Kerry Express, Quantum Solutions	N/A	Third-party - Thai Post and Kerry express	N/A
CROSS-BORDER CAPABILITY	Yes	Yes	N/A	N/A	N/A	No	No	No
NEEDED PRODUCTS TO BE STORED LOCALLY	No	No	No	N/A	N/A	No	N/A	No
DIRECT IMPORT	Yes, especially from China and Hong Kong	Yes	N/A	N/A	N/A	Yes	N/A	Yes
PAYMENT METHOD	COD, credit/debit card, Paypal, Counter Service, Bank transfer	Credit/debit card, COD, Airpay, Bank transfer	COD, credit/debit, bank transfers, Rabbit line pay	COD, Credit/debit card, Paypal,	Credit/debit card, counter service, Line pay, COD, Over the Counter	Bank transfer	Bank transfer, Credit/deibt card, True Money wallet, Counter Serivce	Bank transfer, credit/debit card, counter service, mobile wallets, installment
SELLER REQUIREMENT	- Local bank account - Thai registered company (For brands) - Local Merchant of Record (For brands) - Importer of Record (For brands doing cross-border)"	- Local bank account - Thai registered company (For brands) - Local Merchant of Record (For brands) - Importer of Record (For brands doing cross-border)"	- Local bank account - Thai registered company (For brands) - Local Merchant of Record (For brands) - Importer of Record (For brands doing cross-border)"	- Local bank account - Thai registered company (For brands) - Local Merchant of Record (For brands) - Importer of Record (For brands doing cross-border)"	- Local bank account - Thai registered company (For brands) - Local Merchant of Record (For brands) - Importer of Record (For brands doing cross-border)"	- Local bank account - Passport/ID number	N/A	- Local bank account - Passport/ID number

Source: AusTrade

How does our strategy capitalize on the Thai e-commerce and retail trends as a result of the COVID-19 pandemic?







(Source: Asia Pacific Retail Flash Survey, CBRE Research)

COVID-19 has emphasised the need for retailers to move to **e-commerce**

of lifestyle brands indicated that they would focus on increasing their online sales capacity

of lifestyle brands indicated that they would consolidate their brick and mortar store footprint

E-commerce is the future for Home and Living retail, so putting in the steps to revolutionize this customer experience is an important response to COVID-19 and for the long-term trend of the industry

Source: Case files, Bangkok Post



By Individual Retailer

- Can be done with a modern smartphone
- iPhone has in-built depth sensors
- Cost and time-efficient method of onboarding retailers' products



By Lazada

- Can be done to mitigate risk of individual retailer not self-scanning products
- Lazada can onboard these capabilities at little cost given the lack of a need for special scanning equipment





Zillow Invests in Augmented Reality Interior Design App Hutch

BY TOMMY PALLADINO ② 07/13/2017 8:32 AM

Hutch Interiors, Inc., makers of an eponymous augmented reality home design app for iOS and Android, has closed a series A round of funding, led by online real estate company Zillow Group, totaling \$10 million.

Hutch shares the approach of similar augmented reality apps from IKEA, Pottery Barn, Chairish, and others that place virtual furniture into real spaces before making a purchase.

However, the app takes more of an interior design approach, allowing users to apply and adjust design filters to renderings of virtually-cleared spaces based on specific aesthetics, such as bohemian or trendsetter. Users can create one free design per 24 hour period, but an in-app purchase of \$4.99 unlocks additional designs.





Four views of the bedroom a reporter redesigned with Modsy. Modsy





Modsy



Bloomberg

Deals

Alibaba Makes Its Biggest Bet in Taiwan By Funding Augmented-Reality Startup

By Manuel Baigorri and Lulu Yilun Chen 19 September 2019, 7:56 pm AEST

Perfect Corp.

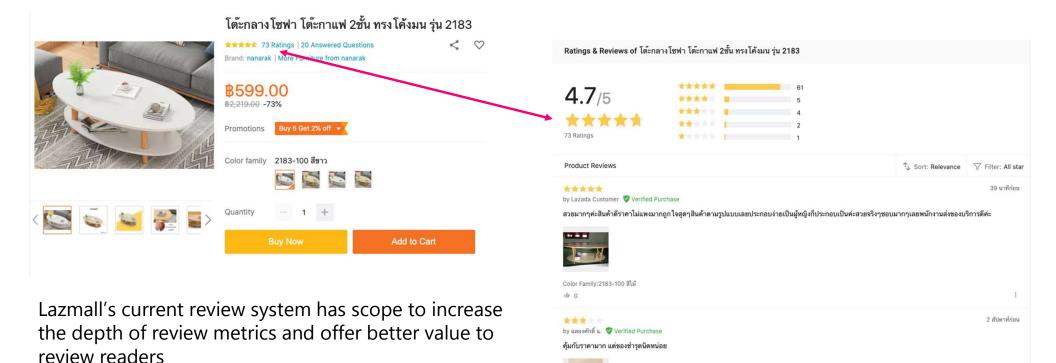
PERFECT



Pictured: Perfect Corp. existing AR capabilities

Source: Bloomberg, Deal Street Asia





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Booking.com





What Aspect Do Thais Dislike the Most from Shopping Online?





Top 5 Factors Preventing Thai Shoppers Purchasing Items Online



Figure 13: The factors that prevent Thai shoppers from participating in e-commerce; ETDA 201741.





GEN Y

17 - 36 years old

Personality⁴³: Refreshing and carefree

WHAT THEY LOOK FOR IN A PRODUCT

Convenience and variety

DIGITAL BEHAVIOUR

Time Spent Online: Weekday:

7 hrs. 12 mins

Weekend:

7 hrs. 36 mins

E-commerce participation:

61.92%

PRIMARY COMMUNICATIONS TOOL

Smartphone and IoT







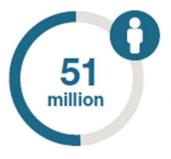
Top reasons why consumers return products



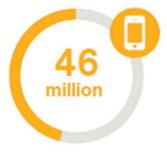




Social Media Numbers in Thailand



Total number of active social media users



Total number of social media users accessing via mobile

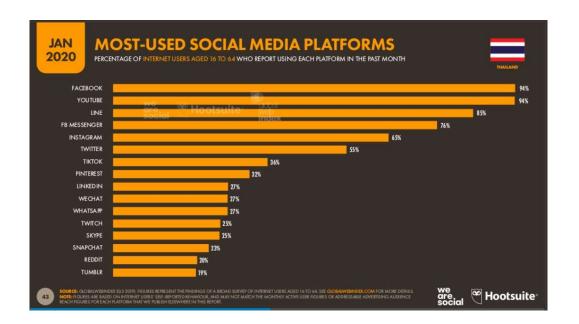


Active social media users as percentage of the total population



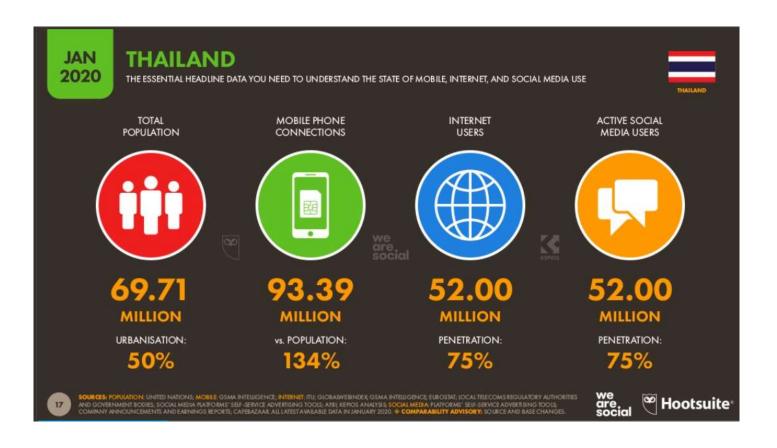
Active mobile social media users as percentage of the total population





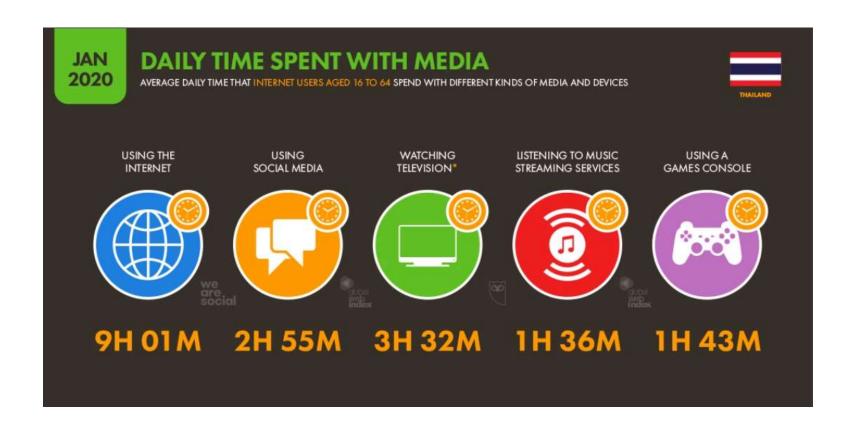




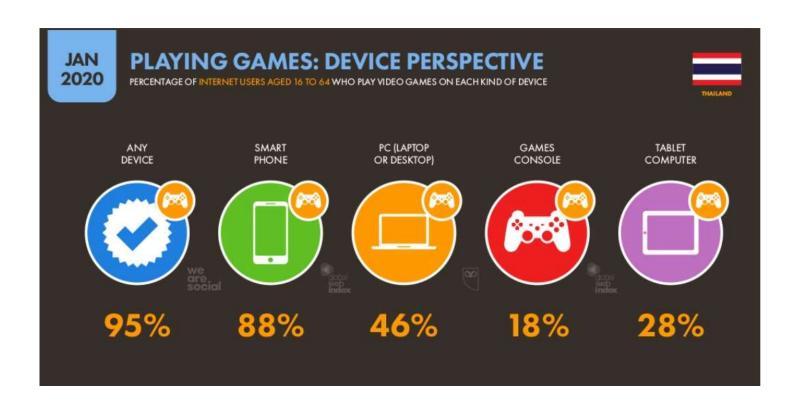


Source: datareportal















Gran	hic	Design
Orap	JIIIC	Design

Pop up Stores

Simple and ease to convey messages

Can clearly portray the authenticity and diversity of products

Can be translated on social media platforms cheaply

Can portray a more 'personable' experience (more than just a website)

Doesn't tend to drive direct engagement

With the rise of COVID-19, in person events are restricted

Not always as memorable

Already done in the launch of Lazmall





We understand there was huge reach and engagement with Pokemon Go that Thailand has now introduced an initiative to boost tourism.

Thai officials are in talks with the game's producers Niantic to increase the number of rare Pokemon, Pokestops and gyms used for playing the game.

The Thai government has already produced Pokemon maps to inspire more Pokemon tourism. But they'll be pushing to attract more fans of the hit game.





Playbasis produce mobile-first **engagement solutions** that attract, connect, and retain customers. Launch your **mobile strategy**, or enhance your existing properties, with Playbasis.

Playbasis focuses on **B2B** for annual contracts and currently has over **572,000 users** and 15-16 servers on Amazon web cloud.

The clients are included True (a telco company), Tops (a supermarket chain), and TMB (one of the largest Thai banks).

Social Media Penetration



Thailand is not only a country full of rich history, fascinating cultures or vibrant hub for tourism. More interesting to note is, the country is becoming a thriving, robust digital oriented space powered by its young internet-savvy and heavily mobile-influenced population. It seems there is an immense shift from traditional media such as print, radio and television towards the more popular digital marketing trend. What's more interesting is, digital adoption of Thailand in recent years;

- 82% internet penetration rate with 90% smart phone users.
- Thai consumers spend more time (an average of 9 hours) per day accessing internet via mobile than any other country.
- 24% (YoY) internet user growth from 2017 on wards, with 74% social media penetration, ranking Thailand among the world's highest at social media use.
- Thailand is also considered as a hotbed for e-commerce with a penetration rate of 62%.
- In 2019 digital ad expenditures in Thailand is pegged to be around THB15 billion. it is predicted, this figure will reach approximately THB20 billion before 2020 is out.



Nordstrom, Neiman Marcus and Chick-fil-A are consistently recognized as delivering the best Customer Experience (CX) year after year. Yet more importantly, data driven and market-based research has shown that improving customer experience is directly linked to business outcomes: higher revenue growth and lower costs. McKinsey insights found that, on average, brands that improve CX:

- Increase revenue 10-15% and
- Lower costs 15-20%.

What is Customer Experience? The sum of all the interactions (feelings, emotions, perceptions) that a customer has with a company over the course of the relationship lifecycle.

Alibaba OPEX Benchmarks



Cost of Revenue

	Year							
	2019	2020)					
	RMB	RMB	US\$	% Change				
	(in millions, except percentages)							
Cost of revenue	206,929	282,367	39,878	36%				
Percentage of revenue	55%	55%						
Share-based compensation expense included in cost of revenue	8,915	7,322	1,034	(18)%				
Percentage of revenue	2%	1%						
Cost of revenue excluding share-based compensation expense	198,014	275,045	38,844	39%				
Percentage of revenue	53%	54%						

Product Development Expenses

	Year			
	2019	2020	î.	
	RMB	RMB	US\$	% Change
	(in	;)		
Product development expenses	37,435	43,080	6,085	15%
Percentage of revenue	10%	9%		
Share-based compensation expense included in product development expenses	15,378	13,654	1,928	(11)%
Percentage of revenue	4%	3%		
Product development expenses excluding share- based compensation expense	22,057	29,426	4,157	33%
Percentage of revenue	6%	6%		

Sales and Marketing Expenses

	Year				
	2019	2020			
	RMB	RMB	US\$	% Change	
	(in I)			
Sales and marketing expenses	39,780	50,673	7,156	27%	
Percentage of revenue	11%	10%			
Share-based compensation expense included					
in sales and marketing expenses	4,411	3,830	541	(13)%	
Percentage of revenue	2%	1%			
Sales and marketing expenses excluding					
share-based compensation expense	35,369	46,843	6,615	32%	
Percentage of revenue	9%	9%			

General and Administrative Expenses

	Year				
	2019	2020			
	RMB	RMB	US\$	% Change	
	(in I)			
General and administrative expenses	24,889	28,197	3,982	13%	
Percentage of revenue	6%	5%			
Share-based compensation expense included in general and administrative expenses	8,787	6,936	980	(21)%	
Percentage of revenue	2%	1%			
General and administrative excluding share-based compensation expense	16,102	21,261	3,002	32%	
Percentage of revenue	4%	4%			



Top Influencer Marketing Statistics Every Marketer Should Know

- 70% of teenage YouTube subscribers trust influencer opinions over traditional celebrities.
- 86% of women turn to social networks before making a purchase.
- 32% of influencers who currently work with brands cite Facebook as the best platform, followed by Instagram at 24%.
- 71% of consumers are more likely to make a purchase based on a social media reference.
- 86% of the most-viewed beauty videos on YouTube were made by influencers, compared to 14% by beauty brands, themselves.
- 57% of beauty and fashion companies use influencers as part of their marketing strategies.
- On average, businesses generate \$6.50 for every \$1 invested in influencer marketing.



3) Gaming is popular with Gen Z and Millennials

In Thailand, 37% of Gen Z and 32% of Millennials played social, multiplayer games in the last 30 days, and with younger generations the key drivers of gaming conversations on Twitter in Thailand, more than one-third (34%) of Gen Z say that playing video games is their long-time hobby. Conversations range from the latest tips and tricks to sharing recommendations and their favourite streaming moments.



E-Commerce Value



Figure 5: Thailand's important number for the Internet user profile and e-commerce landscape; We Are Social, Hootsuite (2018) and Electronic Transactions Development Agency (ETDA) (2017).

Marketing Funnel Rates



Social media ad clickthrough rates - a comparison of Facebook and Twitter CTRs

Recent changes in Facebook CTRs from a Nanigans Q1 2018 Facebook advertising benchmarks show response rates moving upward for e-commerce marketers even after increasing in Q4. The average Q1 2018 CTR of 2.98% in Q1 is 25% higher quarter-over-quarter and 61% higher year-over-year. This is at a similar

The cheapest clicks on Facebook are reserved for the apparel (\$0.45 per click), travel and hospitality (\$0.63) and other retailers (\$0.70) industries, with clicks well below a dollar. These industries often have the largest audiences so even at these low CPCs, it's important to understand how to manage your budgets so that your Facebook costs don't run amok.

However, industries such as retail, travel & hospitality, and technology may not benefit as much from Facebook's lead generation ads and consequently have much lower conversion rates (3.26%, 2.82%, and 2.31%, respectively). For these advertisers, remarketing on Facebook may be particularly powerful to help improve conversion rates. As it turns out, exposure to remarketing ads can help increase conversion rates over time!

Key Takeaways

CTR: 2.98%

CPC: \$0.63

CVR: 3.26%

Rationale

A Facebook CTR, CPC and CVR were used as these ads are directed at customers not specifically looking to purchase the advertised products.

Facebook and other social media utilise targeted advertisements to create impressions on the target market.



WACC Calculation			
	Units		
Required return on de	bt calcula	tion:	
Average Debt	RMB	125,430 F	Y2020 Balance Sheet
Average Debt +Equit	RMB	995,978 F	Y2020 Balance Sheet
		12.59%	
Interest Expense	RMB	5,180.00 F	Y2020 Balance Sheet
Average Debt	RMB	125,430.00 F	Y2020 Balance Sheet
Kd		4%	
Tax Rate		18%	
Kd after tax		3%	
Required return on eq	uity calcu	lation:	
Average Equity	RMB	870,548 F	Y2020 Balance Sheet
Average Debt +Equit	RMB	995,978 F	Y2020 Balance Sheet
		87.41%	
Beta		1.56 Ya	ahoo (5Y Monthly)
Market Return	%	10.0% A	verage Nasdaq and TSX annual return
Risk free rate	%	3.26% Tr	rading Economics: 10Y Bond Rate (China)
Risk Premium	%	6.26% N	IYU Stern
Ке		13.03%	
WACC		11.59%	



		31/12/2020		31/12/2021	r)	31/12/2022		31/12/2023		31/12/2024
Conslidated, Incremental Impact										
Total Revenue	₿	531,021	₿	986,079	₿	1,278,229	₿	1,307,621	₿	1,495,188
Total Costs	-₿	665,537	-₿	871,502	-₿	1,115,577	-₿	1,122,981	-₿	1,265,792
FCF	-₿	134,516	₿	114,577	₿	162,652	₿	184,639	₿	229,396
PV	-₿	120,543	₿	92,010	₿	117,048	₿	119,068	₿	132,565
5Y NPV	₿	340,148								
NPV	₿	4,688,759								
Total Investment										
CAPEX	₿	189,420	₿	-	₿	-	₿	-	₿	-
Total Investment	₿	189,420								



Free Returns										
Revenue	₿	187,042	₿	235,673	₿	296,949	₿	374,155	₿	471,435
Costs	₿	184,442	₿	232,397	₿	292,820	₿	368,953	₿	464,881
FCF	₿	2,600	₿	3,276	₿	4,128	₿	5,202	₿	6,554
PV	₿	2,330	₿	2,631	₿	2,971	₿	3,354	₿	3,788
NPV	₿	15,074								
Customer Experience										
Revenue	₿	89,780	₿	169,685	₿	285,071	₿	404,088	₿	565,723
CAPEX	₿	161,007	₿	-	₿	-	₿	-	₿	-
Expenses	₿	74,167	₿	134,596	₿	221,483	₿	309,510	₿	428,783
FCF	-₿	145,393	₿	35,089	₿	63,588	₿	94,578	₿	136,940
PV	-₿	130,291	₿	28,178	₿	45,759	₿	60,990	₿	79,135
NPV	₿	83,772								



		31/12/2020		31/12/2021		31/12/2022		31/12/2023		31/12/2024
Social Media Marketing										
Revenue	₿	111,457	₿	289,787	₿	333,255	₿	199,953	₿	119,972
Expenses	₿	100,357	₿	260,929	₿	300,068	₿	180,041	₿	108,025
FCF	₿	11,099	₿	28,858	₿	33,187	₿	19,912	₿	11,947
PV	₿	9,946	₿	23,174	₿	23,882	₿	12,841	₿	6,904
NPV	₿	76,748								
Influencer Marketing										
Revenue	₿	71,822	₿	186,737	₿	214,747	₿	128,848	₿	77,309
Expenses	₿	63,479	₿	165,046	₿	189,803	₿	113,882	₿	68,329
FCF	₿	8,342	₿	21,690	₿	24,944	₿	14,966	₿	8,980
PV	₿	7,476	₿	17,418	₿	17,950	₿	9,651	₿	5,189
NPV	₿	57,684								



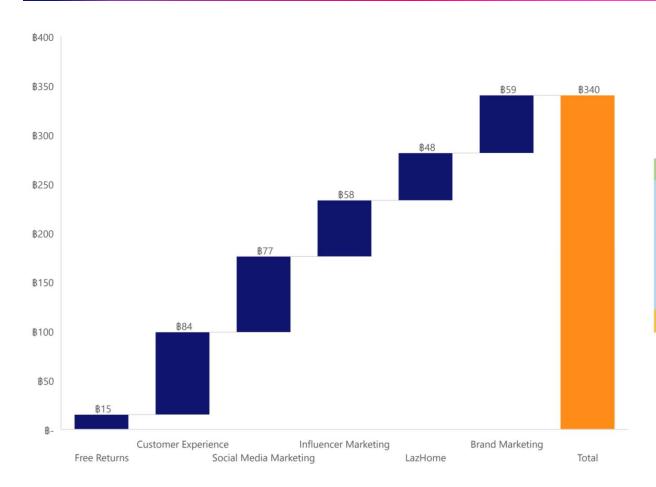
		31/12/2020		31/12/2021	a	31/12/2022		31/12/2023		31/12/2024
LazHome										
Revenue	₿	30,004	₿	51,007	₿	79,061	₿	110,685	₿	143,891
CAPEX	₿	28,413	₿	-	₿	-	₿	-	₿	-
Expenses	₿	22,203	₿	37,625	₿	58,221	₿	81,459	₿	105,897
FCF	-₿	20,612	₿	13,382	₿	20,839	₿	29,226	₿	37,994
PV	- ₿	18,471	₿	10,746	₿	14,997	₿	18,847	₿	21,956
NPV	₿	48,075								
Brand Marketing										
Revenue	₿	40,916	₿	53,190	₿	69,147	₿	89,891	₿	116,859
CAPEX	₿	-	₿	-	₿	-	₿	-	₿	-
Expenses	₿	31,468	₿	40,909	₿	53,181	₿	69,136	₿	89,877
FCF	₿	9,447	₿	12,281	₿	15,966	₿	20,755	₿	26,982
PV	₿	8,466	₿	9,862	₿	11,489	₿	13,385	₿	15,593
NPV	В	58,795								



		31/12/2020		31/12/2021		31/12/2022		31/12/2023		31/12/2024
Lazada Thailand Revenue										
Unadjusted Thailand Revenue	₿	23,380,300	₿	29,459,178	₿	37,118,564	₿	46,769,391	₿	58,929,433
New Revenue	₿	531,021	₿	986,079	₿	1,278,229	₿	1,307,621	₿	1,495,188
New Total Revenue	₿	23,911,321	₿	30,445,257	₿	38,396,794	₿	48,077,012	₿	60,424,621
Revenue Increase		2.27%		3.35%		3.44%		2.80%		2.54%
Lazada Home and Living Revenue)									
Unadjusted Thailand Revenue	₿	4,250,964	₿	5,356,214	₿	6,748,830	₿	8,503,526	₿	10,714,442
New Revenue	₿	531,021	₿	986,079	₿	1,278,229	₿	1,307,621	₿	1,495,188
New Total Revenue	₿	4,781,984	₿	6,342,293	₿	8,027,059	₿	9,811,146	₿	12,209,631
Revenue Increase		12.49%		18.41%		18.94%		15.38%		13.95%
Market Share										
Market Size	₿	12,526,976	₿	15,533,450	₿	21,372,890	₿	26,502,384	₿	32,862,956
Total Revenue	₿	2,401,445	₿	3,342,813	₿	4,247,714	₿	5,049,172	₿	6,209,543
Market Share		19.17%		21.52%		19.87%		19.05%		18.90%

NPV Waterfall





NPV	
Free Returns	\$ 15,074.08
Customer Experience	\$ 83,772.00
Social Media Marketing	\$ 76,747.58
Influencer Marketing	\$ 57,684.40
LazHome	\$ 48,074.79
Brand Marketing	\$ 58,794.72
Total	\$ 340,147.57



LazMall MVP Revenue and Overall Market Sizing

Lazada Home and Living				2021		2022		2023	23 202			2025
•			Baht	Thousands	Bah	nt Thousands	Bal	nt Thousands	Bah	t Thousands	Bah	t Thousands
Assumptions												
WACC	11.59%											
Exchange Rate	31.57											
Revenue												
Alibaba International Commerce Customers		180000										
Lazada Customers (Alibaba FY20 Report)		70000										
Proportion		39%										
Alibaba International Commerce Revenue	₿	108,442,950	₿	136,638,117	₿	172,164,027	₿	216,926,675	₿	273,327,610	₿	344,392,789
Growth Rate		26%										
Lazada Revenue	₿	42,172,258	₿	53,137,046	₿	66,952,677	₿	84,360,373	₿	106,294,071	₿	133,930,529
Home and Living Proportion		8%										
Lazada Home and Living Base Revenue			₿	4,250,964	₿	5,356,214	₿	6,748,830	₿	8,503,526	₿	10,714,442
Lazada Active Users		100000										
Lazada Thailand Users (NationalThailand)		44000										
Thailand Proportion		44%										
Lazada Thailand Home and Living Base Revenue			₿	1,870,424	₿	2,356,734	₿	2,969,485	₿	3,741,551	₿	4,714,355
Thailand Home and Living E-Commerce Market Size	₿	10,102,400	₿	12,526,976.00	₿	15,533,450.24	₿	21,372,890.00	₿	26,502,383.60	₿	32,862,955.66
Growth Rate		24%										
Lazada Thailand Home and Living Base Market Share				15%		15%	•	14%		14%		14%
149 50 00 1 14 1 190 10 10 10 10 10 10 10 10 10 10 10 10 10												
Customer Experience Revenue			_									
Lazada Thailand Home and Living Base Revenue		le le s	₿	1,870,424	₿	2,356,734		2,969,485	₿	3,741,551	₿	4,714,355
Revenue Improvement from Better CX (Mckinsey)		12%		5%		7%		10%		11%		12%
CX Incremental Revenue			₿	89,780	₿	169,685	₿	285,071	₿	404,088	₿	565,723
Free Returns Revenue												
Lazada Thailand Home and Living Base Revenue			₿	1,870,424	₿	2,356,734	₿	2,969,485	₿	3,741,551	₿	4,714,355
Revenue Improvement from Free Returns Offered		10%										
Free Returns Incremental Revenue			₿	187,042	₿	235,673	₿	296,949	₿	374,155	₿	471,435



Social Media and Influencer Marketing Revenue

Lazada Home and Living			202	21	20	22	2023	2	024		2025
			Baht Thousands	Ba	ht Thousands	E	Baht Thousands	Baht Thousands		Baht Thousands	
Social Media Marketing Revenue											
Thailand Population		69,430									
Thailand Social Media Users		52,000									
Thailand Social Media Penetration		75%									
Thailand Millenial Population		14,400									
Thailand Millenial Social Media Users		10,785									
% Reached Weekly		18%									
Cannibalisation		20%									
Target Market Weekly Impressions		1,553									
Annual Target Market Impressions		80,758									
Click Through Rate		2.98%									
Annual Clicks		2,407	1,20	3	3,12	9	3,598	2,1	59	1,	,295
Conversion Rate		3.26%									
Sales Generated		78	3	9	10	2	117		70		42
Average Transaction Value	₿	2,841									
Social Media Advertisement Marketing Revenue			B 111,45	7 B	289,78	7	B 333,255	B 199,9	53	B 119	,972
Growth Rate		30%	30	%	15	%	-40%	-4	0%		
Influencer Marketing											
Influencers Engaged		140									
Cost Per Influencer		157.85									
Amount Spent on Influencer Marketing	₿	22,099	\$ 11,05	0 8	28,72	9	B 33,038	₿ 19,8	23	B 11.	,894
Revenue Per THB Spent on Influencer Marketing	₿	6.5			-,-						
Influencer Marketing Revenue			B 71,82	2 B	186,73	7	B 214,747	B 128,8	48	B 77.	,309
Growth Rate		30%	30		15		-40%	117	0%	1,000	



Lazada Home and Living			2021		2022	2023	2024	2025
		Baht Thousands	s	Baht Thousands	•	Baht Thousands	Baht Thousands	Baht Thousands
LazHome Game Revenue								
Lazada Thailand Users	44000)						
Thailand Millenial Gamer Proportion (TechSauce)	32%	5						
Interested in Lazhome	0.25%							
Interest to Player Conversion	30.0%							
LazHome PlayerBase	1:	L	11		18	28	39	51
Revenue per Player	₿ 2,841							
Lazhome Revenue		₿ 30	0,004	₿ 51	1,007	8 79,061	\$ 110,685	\$ 143,891
LazHome Player Growth Rate	70%		70%		55%	40%	30%	
Brand Marketing								
Lazada Brands	4000)						
Lazada Home and Living Brands	320)						
Thailand Revenue Per Brand	\$ 5,845							
Brands Contacted	400)						
Brands Converted	1.75%	5						
New Brands		7						
Brand Marketing Revenue		₿ 4	0,916	₿ 53	3,190	B 69,147	89,891	\$ 116,859
Brand Marketing Growth Rate	30%							



Lazada Home and Living		2021	2022			2023		2024		2025
	Baht Ti	nousands	Baht	t Thousands	Bal	nt Thousands	Bah	t Thousands	Bah	t Thousands
CX Incremental Revenue	₿	89,780	₿	169,685	₿	285,071	₿	404,088	₿	565,723
Free Returns Incremental Revenue	₿	187,042	₿	235,673	₿	296,949	₿	374,155	₿	471,435
Social Media Advertisement Marketing Revenue	₿	111,457	₿	289,787	₿	333,255	₿	199,953	₿	119,972
Influencer Marketing Revenue	₿	71,822	₿	186,737	₿	214,747	₿	128,848	₿	77,309
Lazhome Revenue	₿	30,004	₿	51,007	₿	79,061	₿	110,685	₿	143,891
Brand Marketing Revenue	₿	40,916	₿	53,190	₿	69,147	₿	89,891	₿	116,859
Incremental Revenue	₿	531,021	₿	986,079	₿	1,278,229	₿	1,307,621	₿	1,495,188



Lazada Home and Living		2021		2022	2023	2024	2025
	Bah	t Thousands	Baht Thousands	Baht Thousands	Baht Thousand	s Baht Tho	ousands
CAPEX							
Lazada AR Development Cost	₿	142,065					
Lazada Review Framework Redevelopment	₿	18,942					
LazHome Development Cost	₿	28,413					
Total CAPEX	₿	189,420	₿	- B	- B	- B	-



Fixed Opex including Wages, Rent, Coupons, Social Media Marketing and Influencer Marketing

Lazada Home and Living			2021		2022		23	2024	2025	5
		Baht Thou	sands	Baht Thousa	nds	Baht Thousands	Ва	aht Thousands	Baht Thousands	
Fixed OPEX										
Wage of Developers	₿ 100)								
Number of Developers			50		65		85	89	93	3
Developer Wages		₿	5,000	₿	6,500	₿ 8,4	50 B	8,873	₿ 9,316	ĺ
Brand Sales Team Wage	₿ 80)								
Number of Sales Representatives			20		26		34	44	57	7
Brand Sales Team Wages		₿	1,600	₿	2,080	₿ 2,7	04 🛊	3,515	\$ 4,570	
Wage of Support Staff	₿ 60)								
Number of Support Staff			50		58		66	76	87	7
Support Staff Wages		₿	3,000	₿	3,450	₿ 3,9	58 B	4,563	B 5,247	
Sqr Metre per Person	1	6								
New Staff			120		149		.84	209	238	3
Rent Per SQR Metre	\$ 5.23									
Rent		₿	627	₿	776	₿ 9	54 B	1,091	B 1,242	
Coupon Size	\$ 1.50)								
Winners Per Month	200)								
Coupon Payments		₿	300	₿	390	₿ 5	7 8	659	8 857	l
Annual Clicks			1,203		3,129	3,5	98	2,159	1,295	
Cost Per Click	₿ 16	i								
Social Media Marketing Expense		₿	18,994	₿	49,384	₿ 56,7	92 8	34,075	B 20,445	ĺ
Influencers Engaged	20	0								
Cost Per Influencer	\$ 158	3								
Influencer Marketing Spend		₿	11,050	₿	28,729	₿ 33,0	38 B	19,823	B 11,894	
Social Media Marketing Expense		₿	18,994	₿	49,384	\$ 56,7	92 #	34,075	\$ 20,445	
Influencer Marketing Spend		₿	11,050	₿	28,729	₿ 33,0	38 #	19,823	B 11,894	
Coupon Payment		₿	300	₿	390	₿ 5)7 ¢	659	₿ 857	ł
Wages		₿	9,600	₿	12,030	₿ 15,1	22 #	16,950	₿ 19,133	
Rent		₿	627	₿	776	₿ 9	54 #	1,091	B 1,242	1
Total Fixed OPEX		₿	40,571	₿	91,309	₿ 106,4	22 8	72,598	B 53,571	



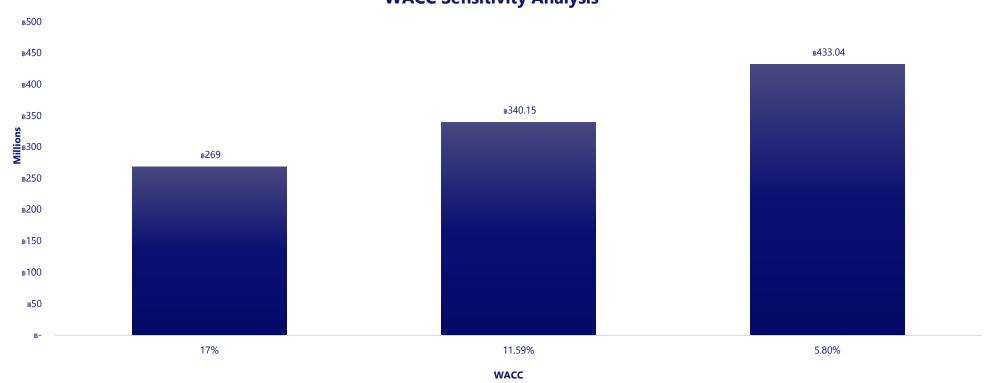
Variable Opex including additional return expenses and NPV Summary

Lazada Home and Living			2021		2022		2023		2024	Į.	2025
		Baht 1	Thousands	Baht	Thousands	Bah	nt Thousands	Bah	t Thousands	Bah	Thousands
ariable OPEX											
Cost of Revenue	55%	₿	292,061	₿	542,343	₿	703,026	₿	719,191	₿	822,354
Exisiting % of Sales Returned	10%										
Global % of Sales returned due to change of mind	18%										
% of Sales Returned including Change of Mind	12.2%										
Shipping Cost % of Sales	3.0%										
New Return Expense %	12.6%										
Additional free returns expense	2.6%	₿	47,901	₿	60,355	₿	76,048	₿	95,820	₿	120,733
Product Development Expenses	9.00%	₿	47,792	₿	88,747	₿	115,041	₿	117,686	₿	134,567
Sales and Marketing Expenses	4.00%	₿	21,241	₿	39,443	₿	51,129	₿	52,305	₿	59,808
General and Admin Expenses	5.00%	₿	26,551	₿	49,304	₿	63,911	₿	65,381	₿	74,759
Total Variable OPEX		₿	435,546	₿	780,193	₿	1,009,155	₿	1,050,383	₿	1,212,221
Net Income		₿	54,904	₿	114,577	₿	162,652	₿	184,639	₿	229,396
FCF		-₿	134,516	₿	114,577	₿	162,652	₿	184,639	₿	229,396
Cumulative Cash Flow		-₿	134,516.09	-₿	19,939.20	₿	142,712.67	₿	327,351.90	₿	556,748.39
PV		-₿	120,543	₿	92,010	₿	117,048	₿	119,068	₿	132,565
TV		₿	4,348,611								

5Y NPV		340,148
NPV	8	4,688,759



WACC Sensitivity Analysis





Return Revenue, Customer Experience, Cost Per Click and Social Media Reach Sensitivity Analysis

					Re	venue Improvemer	nt fr	om Free Returns Offered	
	\$ 340,148	6.94%	,	8.33%		10.00%		12.00%	14.40%
	8.3%	\$ 167,422	₿	208,082	₿	256,875	₿	315,426 \$	385,687
	10.0%	\$ 205,273	₿	245,934	₿	294,726	₿	353,277 ₿	423,538
Revenue Improvement from Better CX (Mcl	12.0%	\$ 250,695	₿	291,355	₿	340,148	₿	398,698 \$	468,960
	14.4%	\$ 305,201	₿	345,861	₿	394,653	₿	453,204 \$	523,465
	17.3%	\$ 370,608	₿	411,268	₿	460,060	₿	518,611 \$	588,872
					%1	Reached Weekly			
	\$ 340,148	12.50%	5	15.00%		18%		21.60%	25.92%
	₿ 22.73	\$ 226,268	₿	251,764	₿	282,360	₿	319,074 \$	363,132
	₿ 18.94	\$ 256,540	₿	282,604	₿	313,880	₿	351,412 \$	396,450
Cost Per Click	₿ 15.79	\$ 281,767	₿	308,304	₿	340,148	₿	378,360 \$	424,215
	B 13.15	\$ 302,790	₿	329,720	₿	362,037	₿	400,817 \$	447,353
	₿ 10.96	\$ 320,309	₿	347,567	₿	380,278	₿	419,531 \$	466,634

Influencer Return, Lazhome Player Conversion, Product Returns and Brand Conversion Sensitivity Analysis



						Inte	erest to Player Con	vers	ion	
₿	340,148		20.83%		25.00%		30%		36.00%	43.20%
₿	4.51	₿	299,482	₿	309,955	₿	322,522	₿	337,602 \$	355,699
₿	5.42	₿	307,494	₿	317,966	₿	330,534	₿	345,614 \$	363,711
Revenue Per THB Spent on Influencer Mark \$	6.50	₿	317,108	₿	327,580	₿	340,148	₿	355,228 ₿	373,325
₿	7.80	₿	328,645	₿	339,117	₿	351,684	₿	366,765 ₿	384,862
₿	9.36	₿	342,489	₿	352,961	₿	365,529	₿	380,609	398,706
						Brar	nds Converted			
₿	340,148		1.22%		1.46%		2%		2.10%	2.52%
	26%	₿	173,531	₿	183,080	₿	194,539	₿	208,289 \$	224,790
	22%	₿	256,601	₿	266,150	₿	277,609	₿	291,359 \$	307,860
Global % of Sales returned due to change o	18%	₿	319,140	₿	328,689	₿	340,148	₿	353,898 🛊	370,399
	15%	₿	367,209	₿	376,758	₿	388,217	₿	401,967 \$	418,468
	13%	₿	404,749	B	414,298	Ď.	425,756	ф	439,507 B	456,007