FROM CLICKS TO CONNECTIONS:

BETTER PRODUCT STORYTELLING FOR RICHER COMMERCE

The state of APAC e-commerce in 2024, and how brands can meet shoppers where they are

SGK

Contents:

About SGK

This research was conducted by SGK, a brand, pack, and content powerhouse. SGK simplifies how brands go to market and grow, with creative storytelling delivered with global reach, to human scale. No matter the brand size or life cycle, we create seamless yet memorable brand journeys that cut through noise, convert sales, and build brand love.

Content is the fuel of digital marketing. But creating connected, cost-effective, sharable content is increasingly difficult. Instead of siloed production, we take a commerce-first approach to create impactful content from pack, digital shelf, to brand experience--all in one unified workflow. So marketers can enjoy a truly regional content solution that's nuanced to local culture, spans channels and markets, and enables visibility and control.

To discover more, visit **SGKinc.com**

01

INTRODUCTION: THE RISE OF EMOTIONAL COMMERCE

Introduction

Shopping is now everywhere—embedded within social posts, watched and commented live in streams, now an instinctive act to scan, check, and share, across channels and mediums. Whereas shopping used to be an act of intent — "Let's go shopping!" — the advent of social commerce and shoppertainment means we're now shopping consciously or unconsciously, all the time.

Nowhere else is online shopping growing faster and in more innovative ways, than the Asia-Pacific (APAC). When it comes to e-commerce, the region leads the world in terms of market size; it's expected to hit USD 2.0 trillion in 2024, and projected to grow at a rate between 8% to 10.32% CAGR from 2023 to 2030 — roughly twice that of offline retail sales.

The region that gave birth to live streaming, superapps, and a myriad of other e-commerce innovations however, is a patchwork of market conditions - from those with advanced digital infrastructure, to developing markets where disparities in internet access, last-mile logistics, and e-payment still hinder growth.

Add to that the explosion of channels, heightened expectations of shoppers, and the painless ways consumers can switch out, which means that just because there are now more ways to reach consumers, doesn't make it easier to do so.

In this report, we identify key changes in shopper channel behaviour, pain points in product selection, and preferences in commerce assets to find out just what helps — or stands in the way — of shoppers making the choice to buy.

But knowledge alone doesn't equal action. Which is why SGK is here to help your brand navigate the path to purchase, from better brands that resonate, to sharper product storytelling that converts. This report and more brand, commerce, and shopper insights can be found at **sgkinc.com.** Enjoy!

Kathryn Sloane
Executive Managing Director
APAC & MEA

Methodology

The report draws on first-party survey data from 3000 consumers across Singapore, Thailand, China, South Korea, Japan, and Australia. We asked respondents how they approach shopping for groceries, beauty or personal care products, and fashion items, uncovering how shopper behaviours across channels are changing, and what it means for brands.

Australia

Korea

Japan

Thailand

SIngapore

China

3,000

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5 Key Headlines

01
Now! Omnichannel by default

The days when omnichannel was still a buzzword is long over, as consumers are hybrid by nature, and shop across channels by default.

Consumers research a product on average, 2.2x ways

75% of shopper journeys begin online

But **54%** are mixed channel shoppers, amongst which **11%** research and discover products online while going offline to purchase, and **4%** being the inverse—discovering and researching products offline, while buying online

Brand opportunities
You don't need to be everywhere at once, but present where it matters. Evaluate the channel fit between your brand and audience, along metrics (amongst others) of reach, demographics, brand fit, and conversion rates. But beware the trade-off and balance between shorter term tactical growth channels, and longer term, strategic goals such as data ownership.

02
Shelf-side discovery is still priority

As APAC shops more on rich-yet-rowdy, one-stop-shop marketplace platforms, shoppers are spending more time browsing within the platform than ever before.

72% of shoppers are open to influence, resulting in impulse buys, whether they're self-professed target shoppers or not

52% now discover products more from e-comm sites, compared to 3 years ago

Brand opportunities
While the rise of social commerce continues apace, don't forget to solve the basics of aiding product discovery on your current commerce pages, where showing more of what the product is, does, and brings to shoppers is still key to triggering inspiration and purchase.

03
Trust and clarity are needed

APAC marketplaces are convenient, but crowded with competition and clutter. Shoppers struggle with choosing one product amongst too many.

#1 Insufficient product info;
#2 Too many similar products, and
#3 Info not presented clearly are the top 3 painpoints shoppers have in choosing what to buy

3 in 4 shoppers have experienced inconsistencies between product page info and what they received

Leading to a potential **11%** loss in sales

Brand opportunities
Pay attention to brand coherence in messaging, look and feel, and design across channels, when inconsistency in APAC can often trigger fears of fake products. But coherence isn't cookie-cutter either, but with expression nuanced to channel needs & behaviour—for example, emphasising clarity on product page, personality on social media, and giving over creative freedom when collaborating with creators.

04
More media is key

Richer media means less squinting and more buying, especially as shopping online increasingly takes place on mobile phones .

87% say more images will make them buy more

Videos are preferred over other format assets **2.8x**

Consumers prefer media-rich product detail pages **6.7x** that of simple product specs

Brand opportunities
More product media is better as shoppers seek to make sense of what they're seeing and buying. Videos convert much better than other formats, but different assets play different roles: video for clarity, lifestyle shots for usage occasions, and basic product shots for in/out shopper missions. But don't duplicate content production across silos. Take a commerce-first approach, and plan smartly to produce a full range of assets ready to be remixed and recombined, all in one go.

05
User reviews are the new content

We live in the age of transparency, where there's no place to hide from product truths. But forget boring, single-line- of-text reviews. These days, reviews, unboxing, and haul videos double as entertainment.

Vs 3 years ago, **52%** of shoppers now find out more about a product through user reviews—the **#1** source of product research

26% discover products more from friends / family, still ahead of influencers at **24%** and livestreaming at **21%**

With the exception of Thailand and China, where Thailand discovers more via influencers at **41%,** and where both countries give more attention to livestreaming (**38%** & **43%**, respectively)

Brand implication
Take both a brand-led and user-sourced lens when considering your product's "hygiene" content, as power has shifted from brand to consumer. You'll need media-rich product details to convert the click, but consider how you encourage and uplift user-generated reviews to prominence through video ads and sponsored posts.

High-tech + High touch

The rise of emotional, rich-media commerce

To say that the storefront has evolved, would be an understatement. From a brick-and-mortar location, to an app, to a social story, to any number of flavours of blended commerce today, shopping is now digital and physical, all at the same time.

Back in 2016, TMall's 1001 Nights campaign broke ground with a blink-and-you'll-miss it, accessible-only-after-midnight shop that came with exclusive short film webisodes, tied with product drops. Today that blend of storytelling, content, and commerce arguably exists in any one of Tiktok's millions of videos, uploaded everyday.

Witness how Alibaba's playbook of reinvigorating physical retail with viral, digital-only brands is now commonplace in mall-side activation.

A posterchild for an online-first, 'clicks and mortar' experience, TX Huaihai in Shanghai is a whole mall curated as an exhibition, with pop-ups sourced from viral Taobao merchants, effectively translating online buzz and acquisition, into offline footfall.

The driving force? Regardless of whether you're Gen Z or not, baptised by the acceleration and uptake of online shopping during Covid, all segments of shoppers now are not only digital-first, but hybrid native. And with past barriers such as complicated purchase processes and UI now much improved, today's shoppers aren't just looking for frictionless experiences—they're looking to be enriched and entertained as well.

This plays to APAC's historical e-commerce strength, where platforms such as Taobao, TMall, and Lazada focused on stickiness, instead of efficiency, as the West did.

While Amazon's simplicity of use got millions to buy, Alibaba and WeChat got millions to stay, with innovations such as media-rich product pages, livestreaming, mini apps, and social commerce. The result is a high-touch, engaging shopping experience that encouraged browsing and discovery, instead of just targeted buys. The result? An average of **9.7 minutes** spent daily on utilitarian Amazon, vs. **27 minutes** on inspirational Tmall.

Today, those innovations have spread worldwide, fuelled by investments in and knowledge transfers to Southeast Asian players such as Shopee and Lazada, and also on the back of the success of TikTok, the social media—and now commerce—juggernaut that counts daily usage in hours, not minutes.

The shopper journey has now completely collapsed, with brand discovery and instant purchase now separated with a mere click. And what was once a linear funnel, now a web of interactions that make every purchase a unique, choose-your-own-adventure journey.

This explosion of paths to purchase is as exhilarating and bewildering to consumers as it can be for brands to navigate. After year upon year of eye-popping growth, the gamified promotions of Singles Day in China is prompting fatigue and backlash, as the sheer cognitive overload of trying to calculate discount mechanics override its perceived benefits.

Emotional commerce takes a different tack: blending cultural conversations at the top of the funnel—ex., Sulwhasoo's Super Brand Day invitations to experience Korean heritage, art, and exclusive content from Blackpink—with clear, engaging product content that builds trust, reason to buy, and seals the sale.

Against a backdrop of noise and choice, shoppers are looking for...

Media-rich product storytelling

More media, for more clarity, for more purchase

Social conversation & conversion

Social proof and discovery that leads to purchase with one click

Coherence and not just consistency of brand and product storytelling across online and offline channels

Seamlessly blended

Stories, not stores

Engaging interactivity and entertainment at every touchpoint

Because let's face it--
when switching out is as easy as a swipe, brands just can't miss any step on the path to purchase!

02

THE EVOLVING SHOPPING JOURNEY

In the world's fastest moving region, rapidly changing digital behaviours are fueling explosive e-commerce growth. And at its nexus, we see the rise and rise of marketplace platforms and social platforms such as TikTok, Line, Shopee, and Lazada that are blending shopping with entertainment.

02.01

New Channels of Discovery

Even in a post-pandemic era, change is rapid and relentless. 84% of Asia-Pacific (APAC) shoppers have changed how they discover brands and products in the last three years.

Compared to three years ago, over half of those surveyed say they now discover products more from browsing — and scrolling — through e-commerce apps and websites. Where consumers may have encountered new products in-store or by word of mouth before 2021, search itself is now happening on all-in-one marketplace platforms like TMall and Lazada, where social content is blended with thousands of global products, buyable with one click.

While changes in top-of-funnel marketing, like the growing importance of creators and influencers, garner most of the marketing industry's buzz, enhancing inspiration and discovery *within* the digital store is arguably more important. Because that's where discovery and conversion happens, and where over two-thirds of shoppers are open to impulse buys.

But different markets move at different speeds, depending on how digital-first, competitive, and even culturally speaking, peer-influenced they are. Thailand and China, for example, show a more marked increase in product discovery through influencer posts and livestreaming than the regional average — in the case of Thailand, outpacing even word of mouth by friends and family. But don't discount brand-led voices and perspectives either, as those same markets also show an increase in following brands on social media.

84%

of Asia-Pacific (APAC) consumers noticed a change in their product discovery patterns in the last three years.

Vs. Three Years Ago, Consumers Now Discover Products More From...

	All markets	Singapore	Thailand	China	Japan	South Korea	Australia
Scrolling through e-commerce apps / websites	52%	57%	64%	72%	50%	38%	29%
Digital advertising	32%	44%	39%	34%	10%	28%	34%
Following brand pages on social media	32%	34%	50%	48%	12%	23%	23%
Word of mouth from friends / family	26%	31%	30%	34%	10%	24%	24%
Influencer posts	24%	26%	41%	30%	9%	22%	16%
Traditional advertising channels	24%	21%	33%	30%	13%	26%	21%
Livestreaming	21%	17%	38%	43%	4%	15%	6%
Other channel(s) not listed here	4%	3%	11%	3%	2%	2%	5%
Nothing has changed compared to three years ago	16%	11%	2%	6%	36%	15%	28%
Total Respondents	3000	500	500	500	500	500	500

Highlights:

When APAC's marketplace platforms offer everything under the sun, why go elsewhere? About 52% of respondents say they now discover more of what to buy by scrolling within e-commerce apps.

China and Thailand are much more peer- and socially-influenced, overindexing on discovery via social media, influencer reviews, and live streaming.

However, trust still reigns supreme: word of mouth from friends/family at 26% still outstrips creators and influencers.

As can be expected, younger age groups show more increases in livestreaming behaviour, reaching nearly half of Gen Z, Millennials, and Gen X in China.

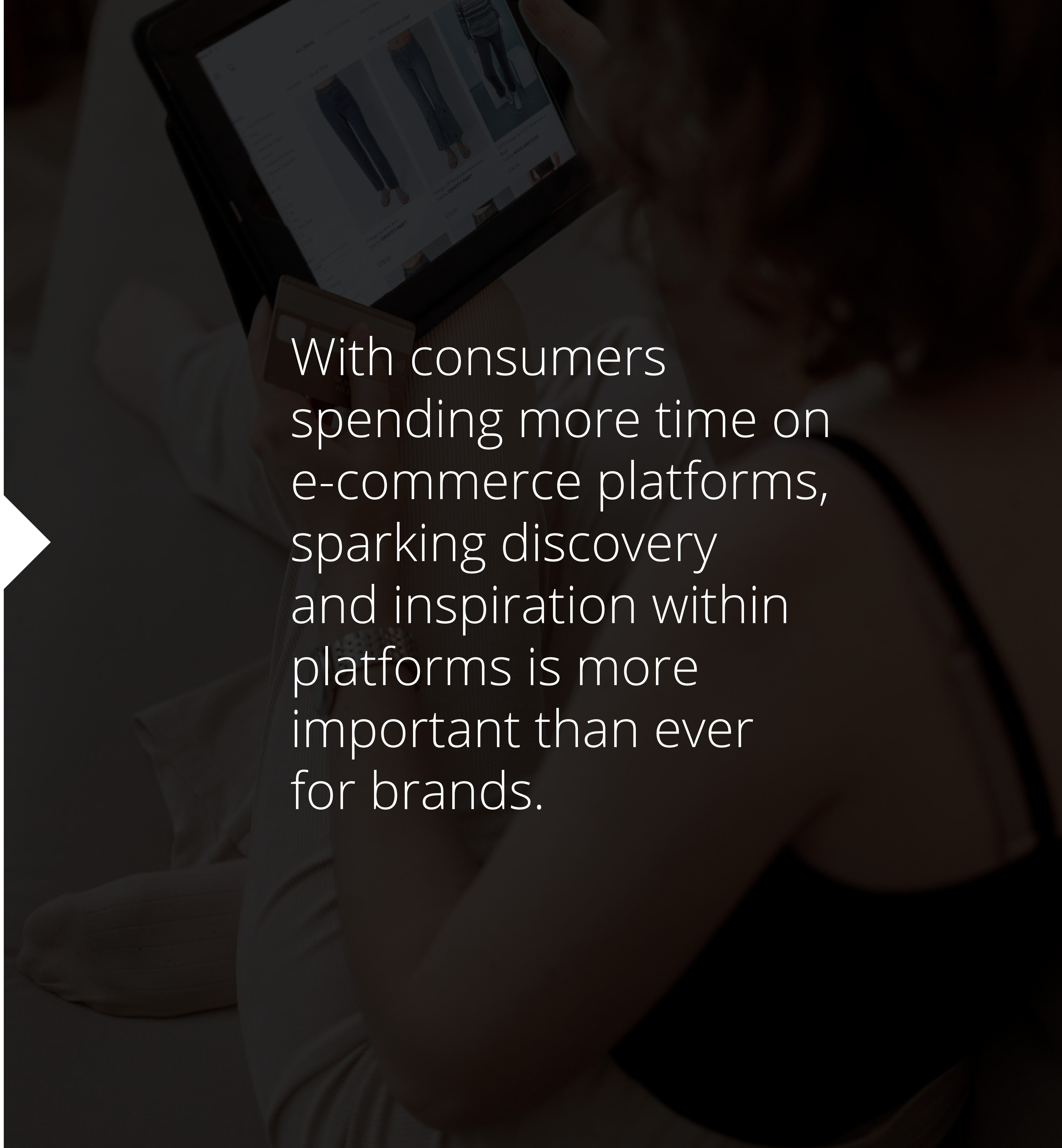
Reflecting both slower pace of change yet more opportunity to grow, 36% of Japanese and 28% of Australian shoppers say nothing has changed in the past three years.

Brand Discovery: The Takeaway

Just as Asian superapps almost resemble a mini operating system within your phone's OS, APAC's marketplace platforms — which account for 58% of shopper behaviour across the three categories — are becoming the go-to source for browsing, inspiration, and purchase.

Given their blend of content, entertainment, and product availability, this shouldn't be a surprise. But with the sheer number of merchants selling the same product online, how to answer not only "Why buy?" but also "Why buy this, here?" becomes the difference between landing a click, and landing a sale.

Brands should do more to boost the discoverability and stickiness of product pages where shoppers browse. The end benefit? More inspiration, for more engagement, for more cross-sales



With consumers spending more time on e-commerce platforms, sparking discovery and inspiration within platforms is more important than ever for brands.

02.02

Research in an Age of Transparency

Brands can no longer hide behind splashy ads and marketing gimmicks. Across the region, 52% of respondents said they research products more via user reviews and ratings.

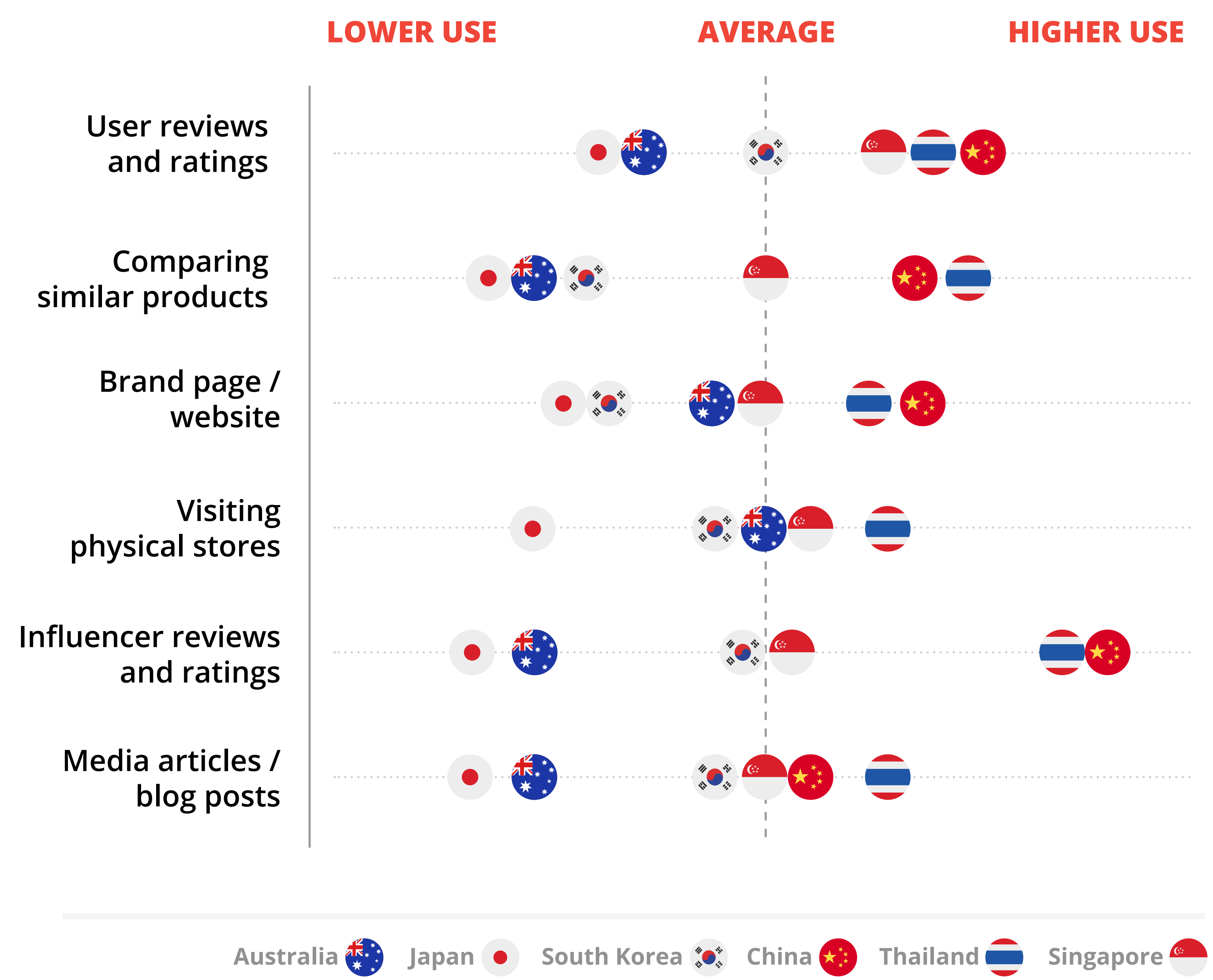
Consumers now also do more research before making a purchase, consulting 2.2 different types of media, including user reviews, brand pages, and blog posts. They also take an average of three steps before purchase, such as checking for discounts and promotions, comparing against similar products, and checking product reviews or ratings.

This is especially true in APAC, where shoppers are known to be studious and information-driven, knowing — in beauty for example — their peptides from their ceramides.

Consistency of brand look, feel, and messaging becomes critical to building trust and brand salience from channel to channel. The goal however, is to avoid copy-pasting, but rather to speak to each channel's characteristic — experiential in physical stores, entertaining in social — all without deviating from the brand persona and product promise.

How Shoppers Research: An APAC View

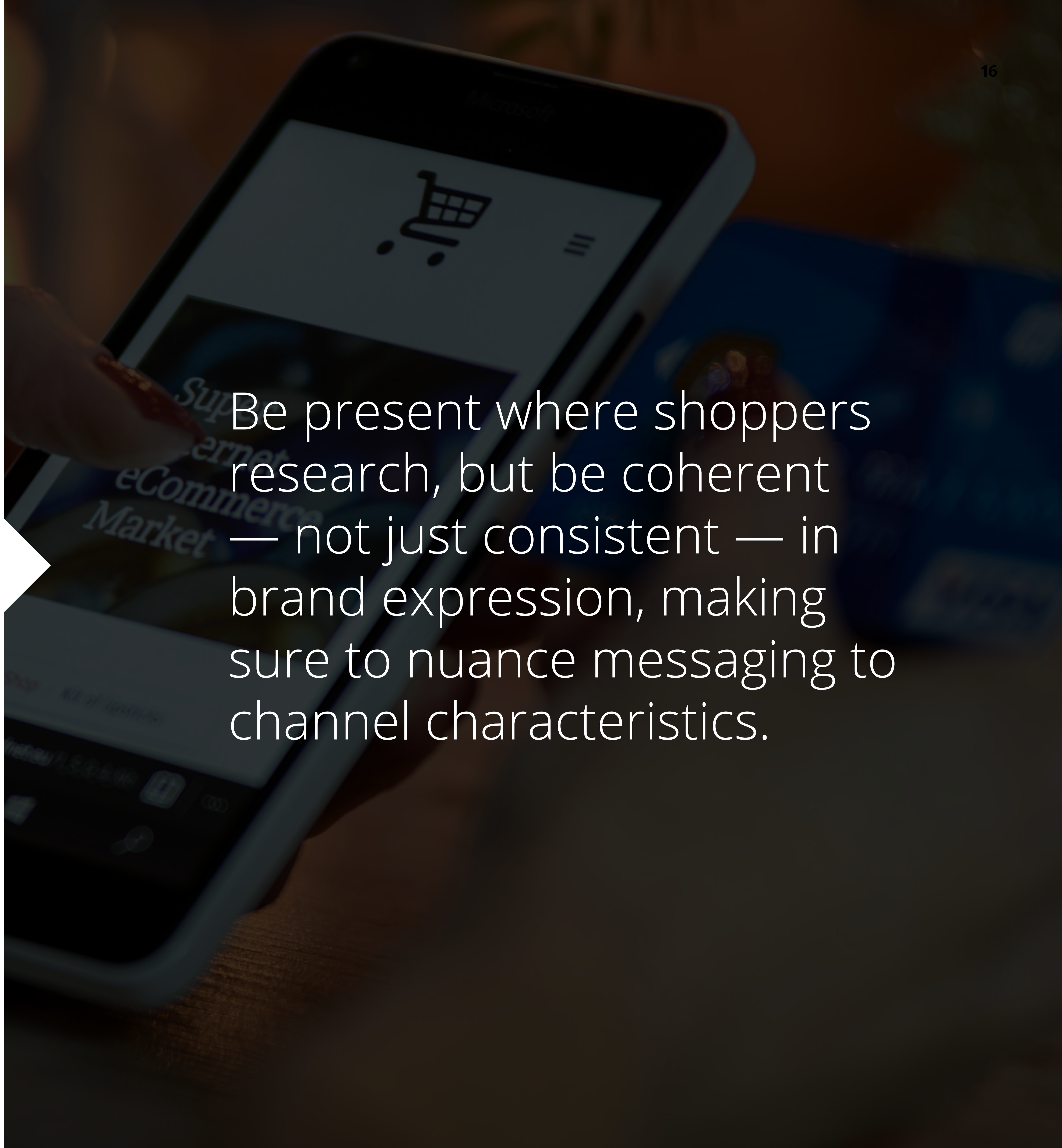
Research channels by market



Product Research: The Takeaway

In Asia, more is more. When marketplace platforms offer the world's goods in one place, it has become both more feasible — and more needed — for shoppers to research what they're buying. Product research happens on almost every possible channel, especially for shoppers in high competition, fast moving, socially-driven, and low product trust markets such as China and Thailand.

User reviews are *the* new content. But forget simple, basic, and boring one-liner text. These days, unboxing, haul, and review videos on TikTok increasingly double as entertainment. Take a multi-pronged strategy to both *where* product info shows up, but also to *how* they're created, blending brand-led and user-generated content (UGC) approaches.



Be present where shoppers research, but be coherent — not just consistent — in brand expression, making sure to nuance messaging to channel characteristics.

03

BARRIERS TO PURCHASE

What's stopping shoppers from buying more? Inconsistency and a lack of product information, leading to unmet shopper expectations.

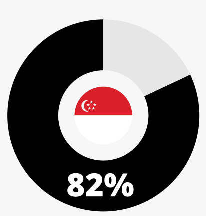
About 17% of shoppers experience inconsistencies always or often, including **poor product quality, differences in appearance,** and **incorrect or misleading information.** And 61% say that product inconsistencies deter them from repurchasing, leading to a loss in sales.

03.01

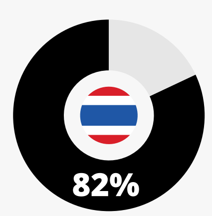
The Cost of Inconsistency

Regionally, businesses can lose as much as 11% of repurchases from inconsistencies in product info. In Thailand, where shoppers often encounter and are deterred by inconsistencies the most, this can rise to a staggering 20%.

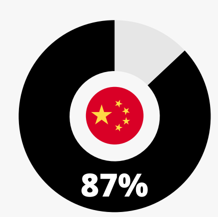
Almost Three in Four Shoppers Encounter Product & Product Page Inconsistencies



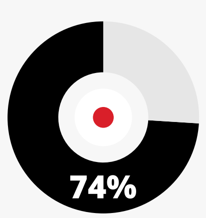
Lower quality than expected	47%
Looks different	47%
Incorrect/ misleading info	32%
Others	12%



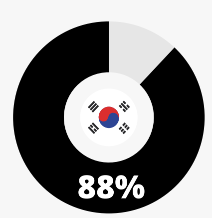
Lower quality than expected	47%
Looks different	47%
Incorrect/ misleading info	38%
Others	15%



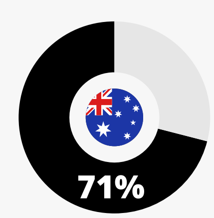
Lower quality than expected	55%
Looks different	43%
Incorrect/ misleading info	34%
Others	12%



Lower quality than expected	41%
Looks different	24%
Incorrect/ misleading info	13%
Others	11%



Lower quality than expected	53%
Looks different	44%
Incorrect/ misleading info	26%
Others	8%



Lower quality than expected	43%
Looks different	36%
Incorrect/ misleading info	19%
Others	11%

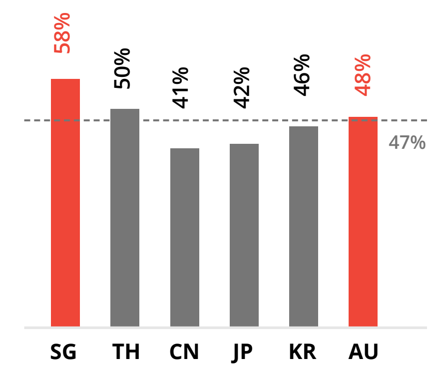
Potential Sales Loss

Combining frequency of inconsistency and deterence to future purchase.

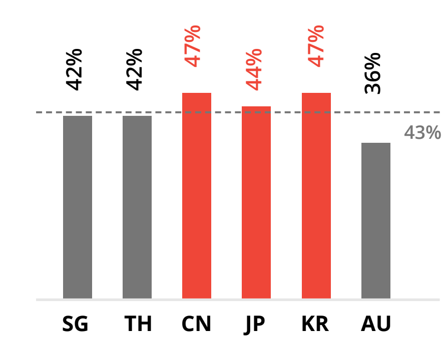
JAPAN	CHINA	SOUTH KOREA	THAILAND	SINGAPORE	AUSTRALIA
5%	8%	9%	20%	15%	12%

What Are Shoppers' Primary Pain Points in Product Selection?

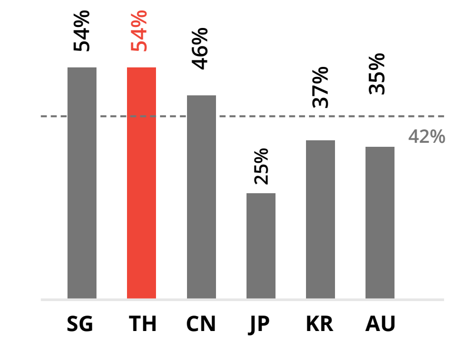
Amongst millions of product options, what are shoppers' primary pain points in product selection? The top three: **too many similar products, insufficient information on products,** and **product information not being presented clearly.** All these pain points can also deter shoppers from continuing their journey — leading to more lost sales.



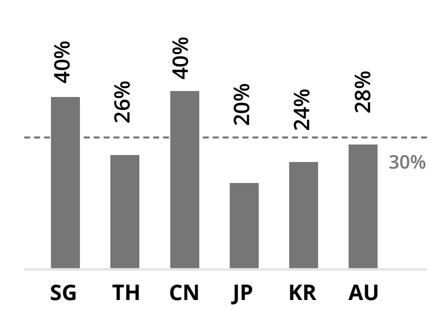
Insufficient info on product



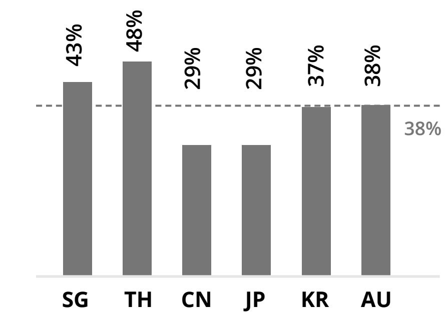
Too many similar products



Info not presented clearly



Product info is cluttered



Product image is unclear

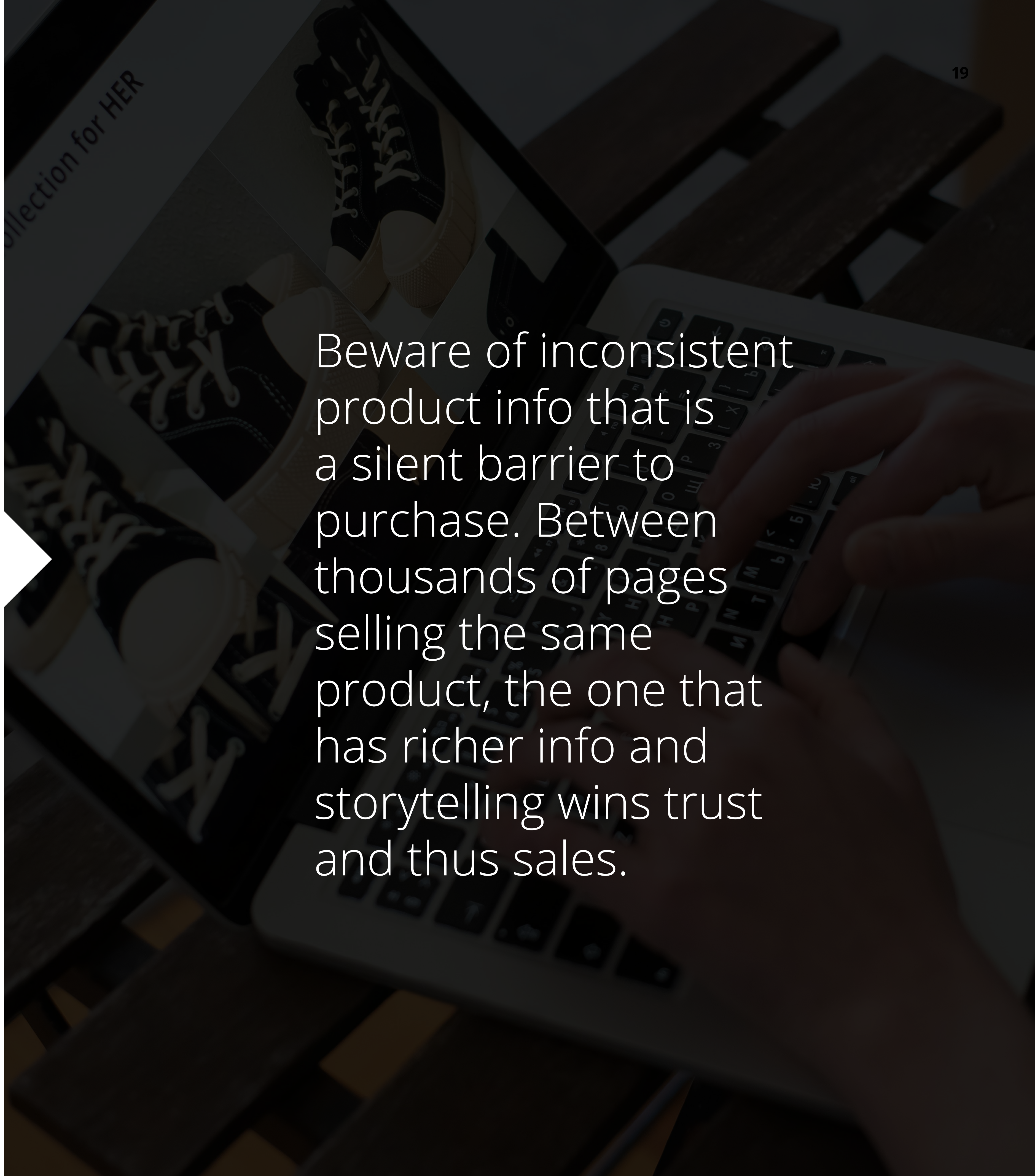
Country's Top Choice

Regional Average

Barriers to Purchase: The Takeaway

More choice means the need for more info to sway purchase decisions. But mismatched product quality, differences in appearance, and inaccurate product information can deter repurchase.

In a region rife with fakes, me-too’s and hence lacking in brand trust, the basics matter. Updated, complete, and engaging product pages not only help products stand out amongst a sea of similar offerings; they also build brand trust through consistency.



Beware of inconsistent product info that is a silent barrier to purchase. Between thousands of pages selling the same product, the one that has richer info and storytelling wins trust and thus sales.

04

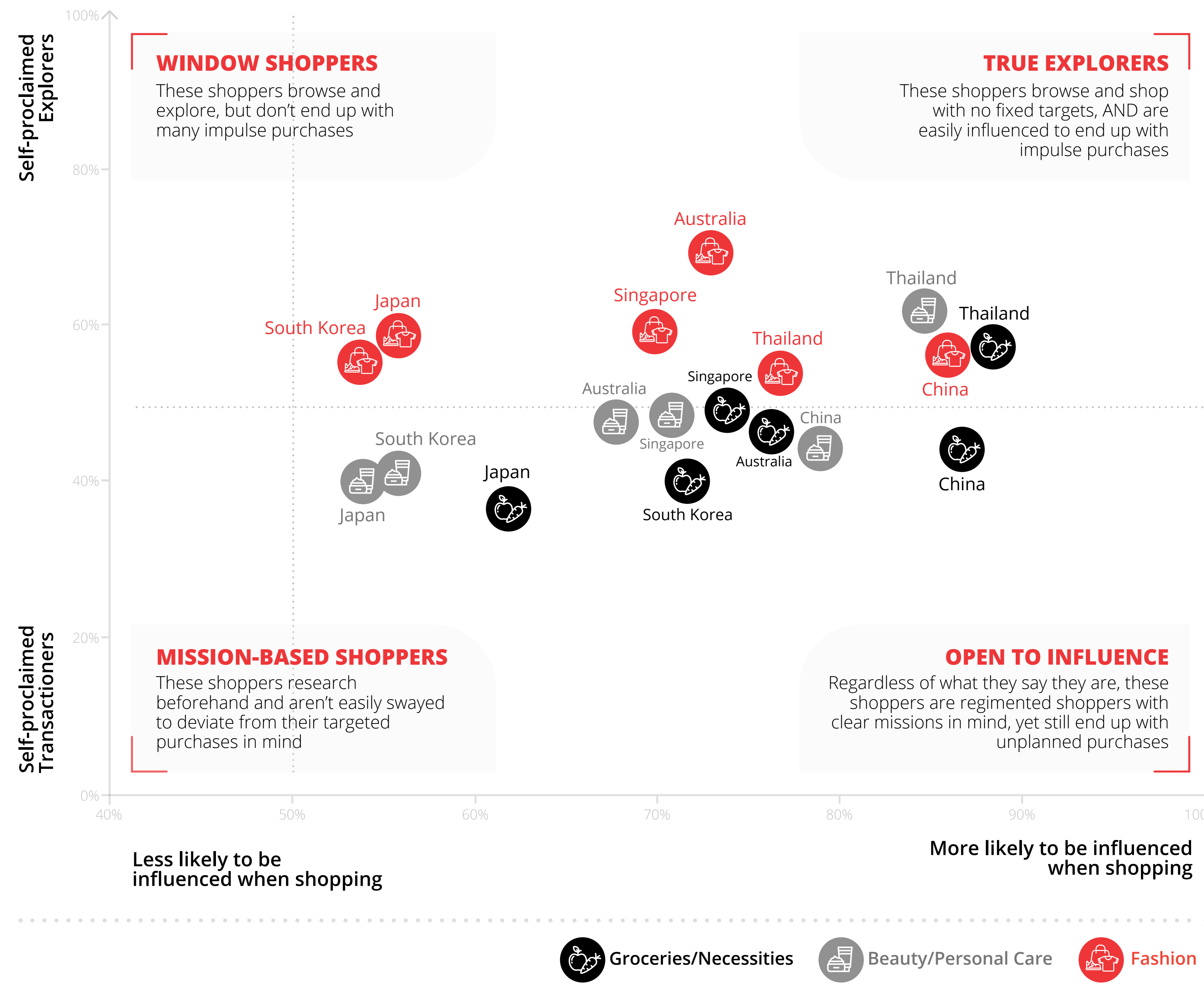
THE POWER OF MEDIA

If poor media hinders sales, can brands flip the script, and use better, more engaging content to spark purchase desire? Indeed they can, because our survey shows that over two-thirds of shoppers from all markets across all categories are open to influence.

Impulse Purchases at the Digital Shelf

How easy is it to influence consumer purchases? We mapped shoppers along two axes:

- **EXPLORER - TRANSACTIONER**
  Explorers shop, browsing with no fixed targets, and **Transactioners** research beforehand for targeted buys
- **INFLUENCED - NOT INFLUENCED**
  Influenced are those who end up with unexpected purchases, and **Not Influenced** those who only buy what they intended



Highlights:

Shoppers from all markets lie beyond the 50% mark for propensity to be influenced. Even disciplined Transactioners end up with impulse purchases, represented by the lower right quadrant.

While Fashion is dominated by open-to-discovery Explorers, Groceries/Necessities have the highest unexpected purchases, even if it's dominated by often "auto-pilot" Transactioners.

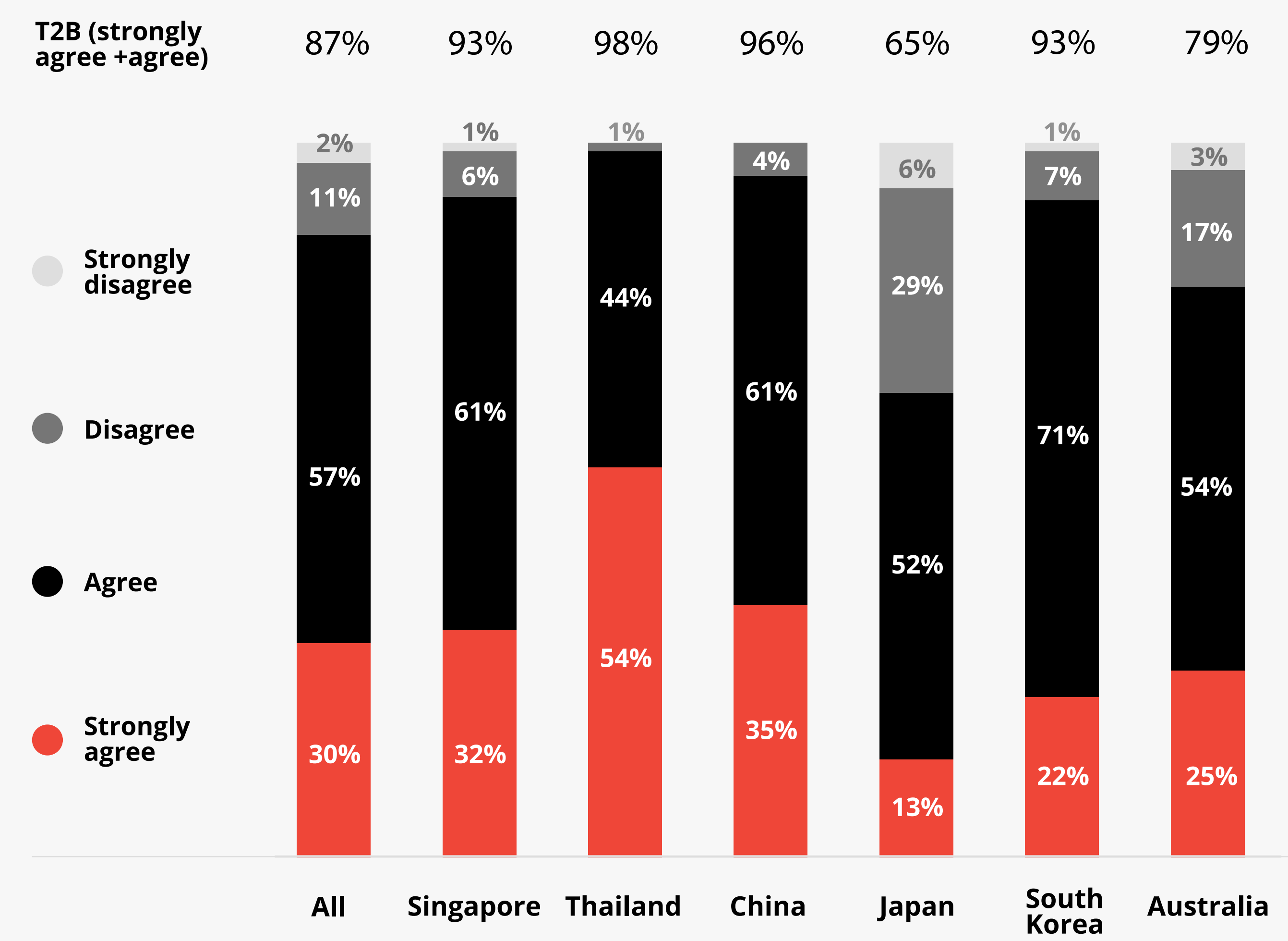
04.01

Content That Converts

Regionally, 87% say they are more likely to purchase a product if shown more media content. And in our attention-starved world, video is king. This is true even for necessities; 59% of survey respondents say videos would make them want to purchase groceries.

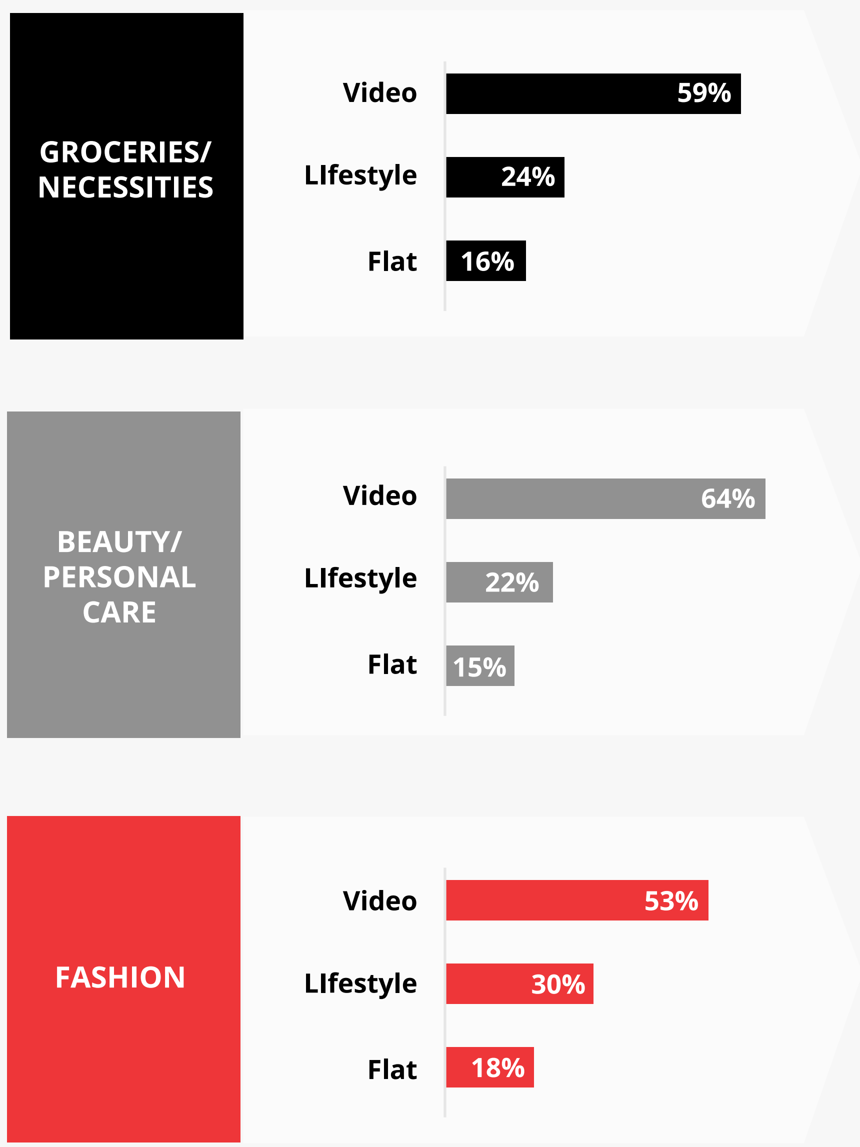
Regionally, **87%** say they are more likely to purchase a product if shown more media content.

More Images in a Product Page Can Drive Sales



Which Media Format?

Video might reign supreme, but different media formats play different — yet complementary — roles, all of which are desired by shoppers. Within each category, shoppers prefer videos by a wide margin, but gave different reasons for liking each kind of format.



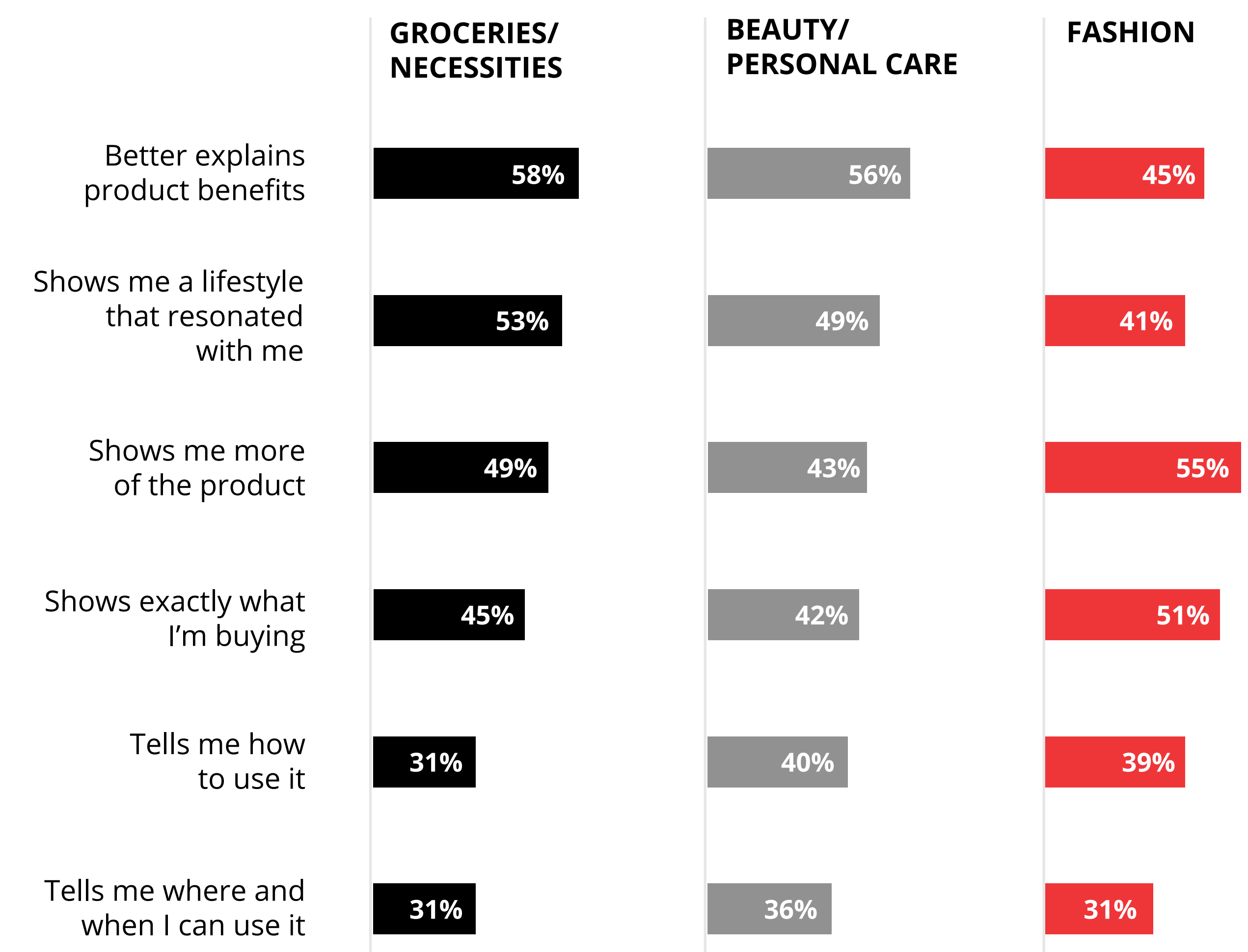
Video is most preferred as it allows customers to see more of the product.

Lifestyle photography showcases the product in a real-life context, providing more information on how it would impact users.

Flat shots put the products front and centre, providing a clear, concise view of what's on offer. This is most suitable for targeted shoppers.

What Buyers Look For in Video Content

It's not just the media format, but also what it shows. The answer to "Why video?" differs for different categories. For Groceries/Necessities and Beauty/Personal Care, shoppers like to see more product benefits and lifestyle, while for Fashion this means showing a more detailed and dimensional view of the product itself — "just what I'm buying."



04.02

Telling a Story with Media-Rich Product Pages

When shoppers are pressed for time, inundated with options, and have to make a choice, simple-but-basic lists of text specs don't cut it anymore. Today, media-rich product detail pages (PDPs) are not only the norm, but fully expected.

Shoppers prefer media-rich PDPs **6.7x** that of simple product specs

The Importance of Rich Media PDPs

Basic

Modular

Gallery

What Kind of PDPs do Shoppers Like and Prefer the Most?

Some 58% of shoppers prefer modular layouts for Groceries/Necessities for visual clarity

Gallery type is preferred by 46% and 48% of shoppers for Beauty/Personal Care and Fashion, respectively, for better highlighting of features and benefits

Together, shoppers prefer media-rich product detail pages a staggering 6.7x that of simple product specs

04.03

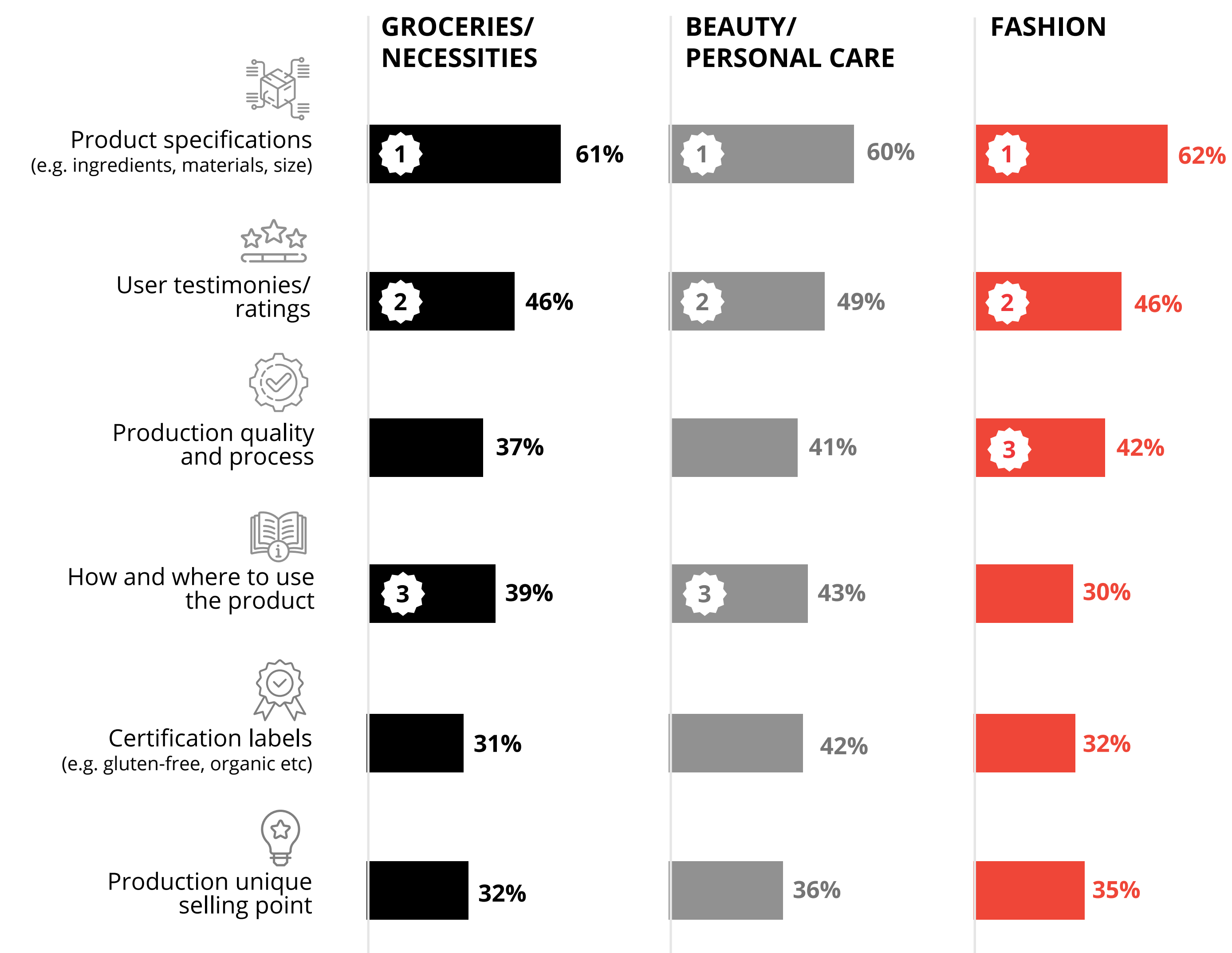
What Information Drives Sales

Consumers are researching more before they buy, looking for an average of at least three types of information across categories. Our survey shows that **product specs are the most crucial element in all categories.** People want comprehensive information about a product's features, ingredients or materials, and technical details. This is true for most countries.

Beyond product specifications, **user testimonies and ratings are the second most sought-after pieces of information.** Prospective buyers value insights from fellow consumers who have used the product, seeking out first-hand accounts on performance, quality, and effectiveness.

The **third most important type of information varies depending on the category.** For Groceries/Necessities and Beauty/Personal Care products, consumers often want to know how and where to use the product. This may include recommended application methods or frequency of use. For Fashion, production quality and process are significant considerations. Consumers are interested in where the product is manufactured and the materials used.

Top Looked-for PDP Info

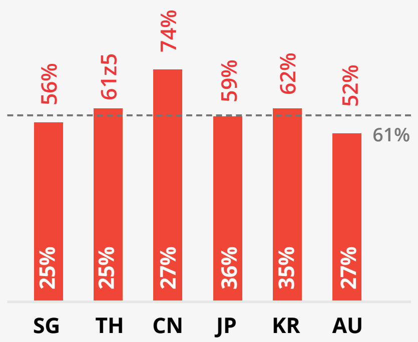


Across the region, product specifications are the top information consumers seek. Some markets are more research-heavy than others; Thailand and China seek out five types of information when researching products. More Thais value production quality, while more Chinese look for certification labels for beauty and fashion products.

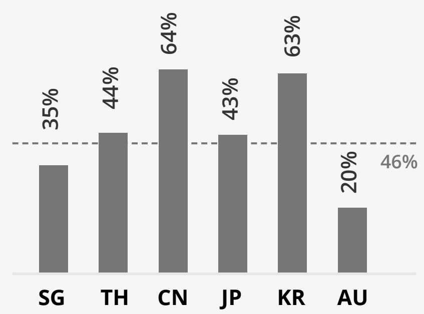
Top Looked-For Info on Product Pages by Category

GROCERIES / NECESSITIES

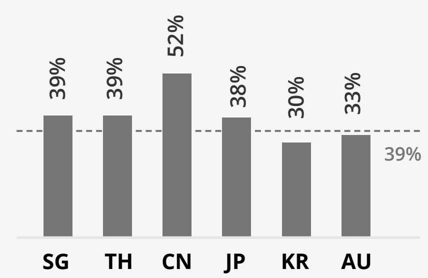
Country's Top Choice
Regional Average



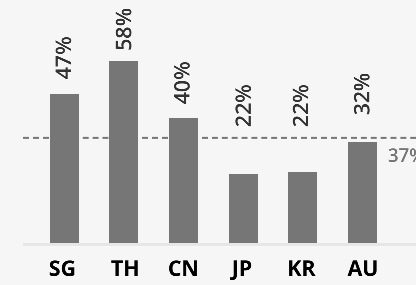
Product specifications



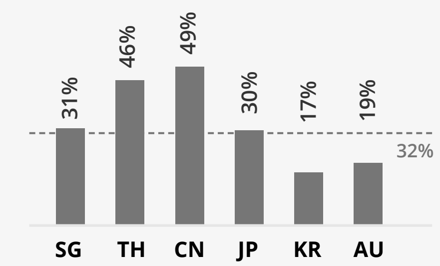
User testimonials/ ratings



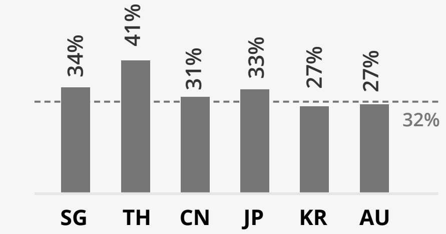
How and where to use the product



Production quality and process

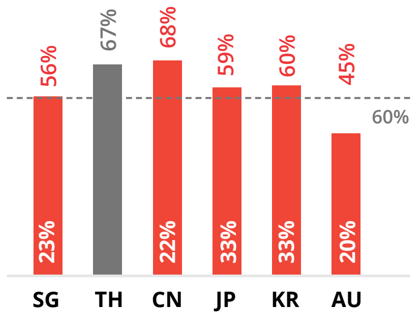


Product's USP

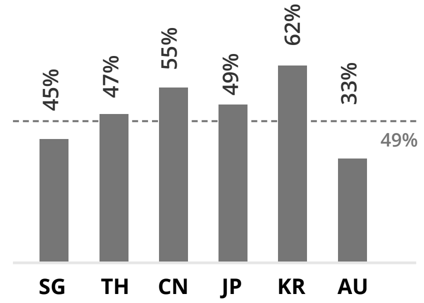


Comparison with competitor products

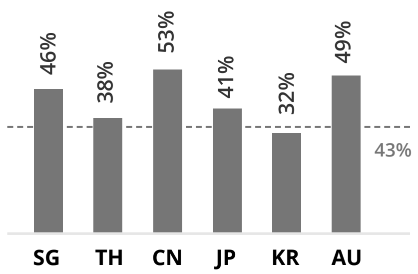
BEAUTY / PERSONAL CARE



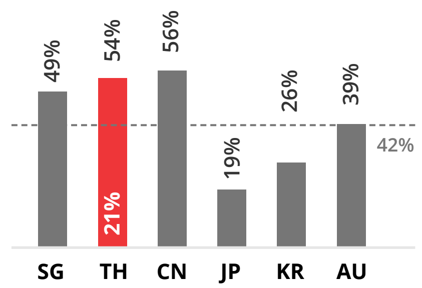
Product specifications



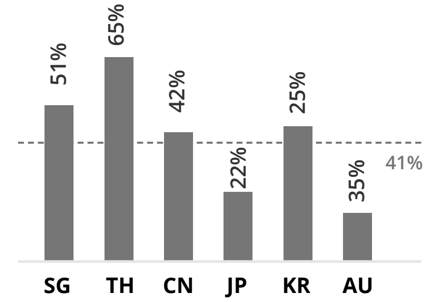
User testimonials/ ratings



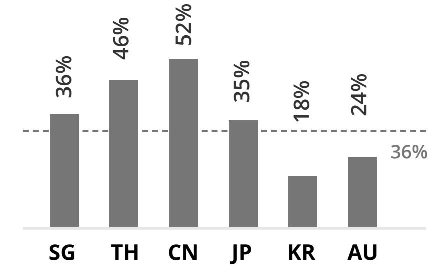
How and where to use the product



Certification labels

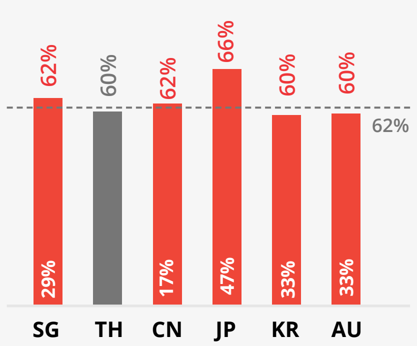


Production quality and process

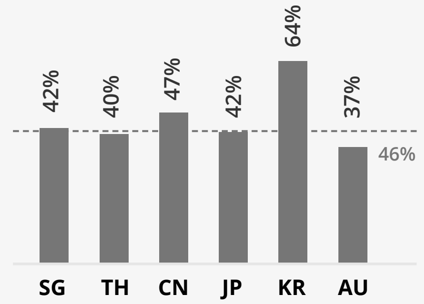


Product's USP

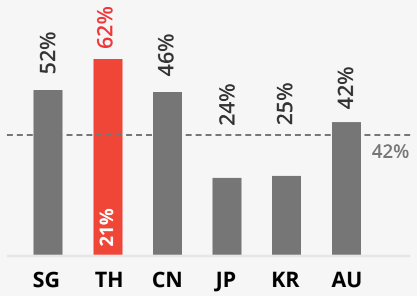
FASHION



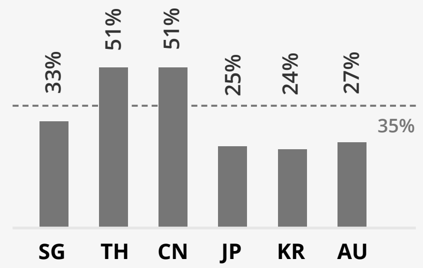
Product specifications



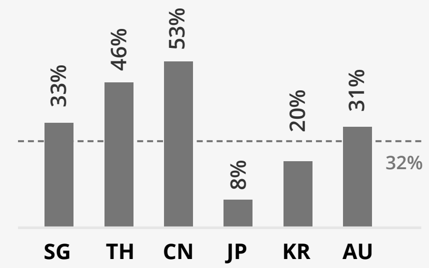
User testimonials/ ratings



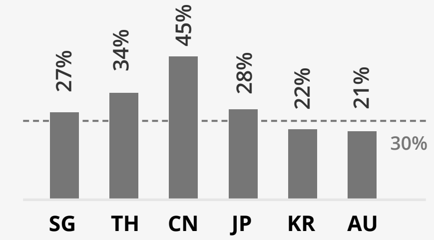
Production quality and process



Products's USP



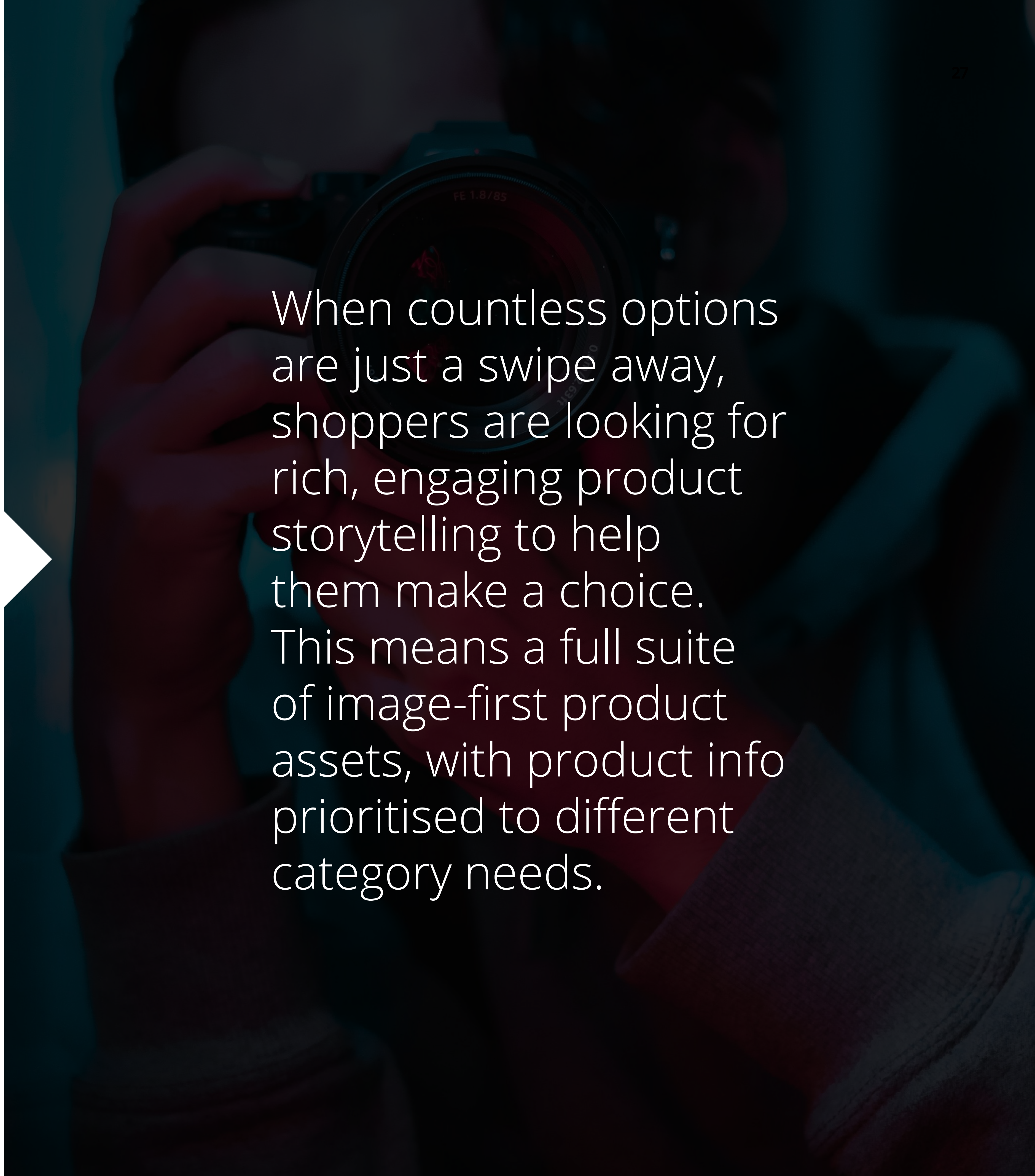
Certification labels



How/where to use the product

The Power of Media: The Takeaway

Brands have a responsibility to help shoppers squint less and buy more. The solution? Richer media on product pages, with different asset formats playing complementary roles. Keep in mind that moving videos on search result pages have more grabbing power, and videos on PDPs are decreasing scroll below the fold.



When countless options are just a swipe away, shoppers are looking for rich, engaging product storytelling to help them make a choice. This means a full suite of image-first product assets, with product info prioritised to different category needs.

05

OMNICHANNEL BY DEFAULT

In APAC, marketplace platforms now dominate the online shopping space. Across all three surveyed categories, 58% of those surveyed report purchasing more from places like Shopee, Taobao, or Rakuten compared to three years ago. More choice, however, also gives rise to pain points such as too many similar products, and not getting enough product info.

Compared to Three Years Ago, Consumers are Shopping More At...

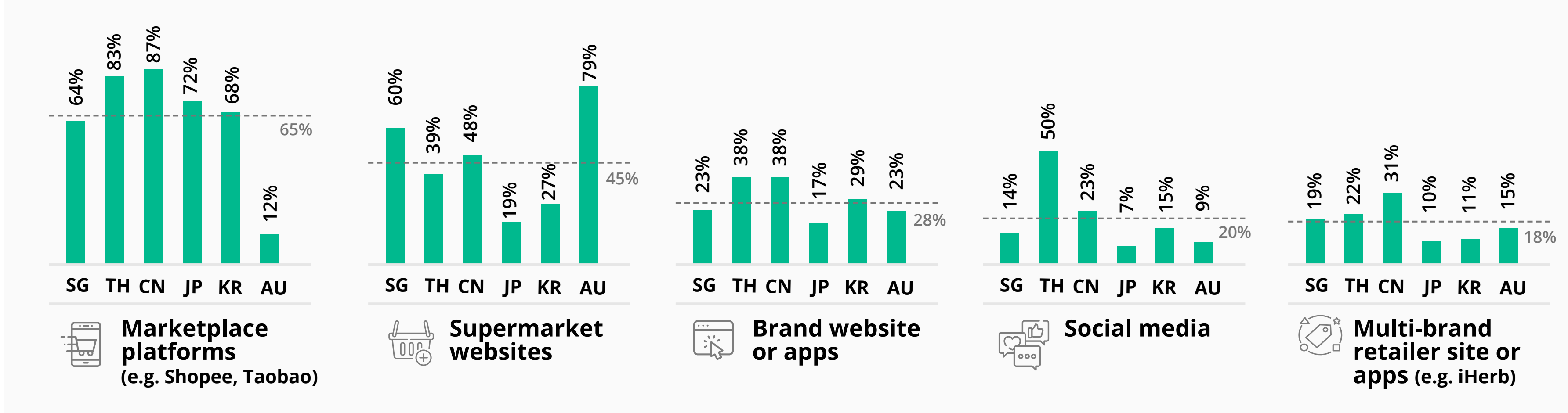
Brick-and-mortar venues are still relevant; nearly a third of shoppers still go to physical stores to make their purchases. Omnichannel shopping is the default, with significant purchases also occurring on brand websites/apps, social media, and multi-brand retailers.

	ALL	SG	TH	CH	JP	KR	AU
Marketplace platforms (e.g. Shopee, Taobao, Amazon, Rakuten)	58	67%	73%	78%	47%	51%	31%
Physical stores	32%	36%	42%	32%	21%	26%	33%
Brand websites or apps (e.g. nike.com, nespresso.com, sk-ii.com)	28%	31%	29%	43%	14%	27%	26%
Social media	27%	22%	58%	36%	7%	23%	16%
Multi-brand retailer site or apps (e.g. Sephora, Foot Locker, Iconic, Takashimaya, iHerb)	24%	27%	31%	42%	8%	13%	20%
Others	4%	8%	2%	7%	35%	13%	27%

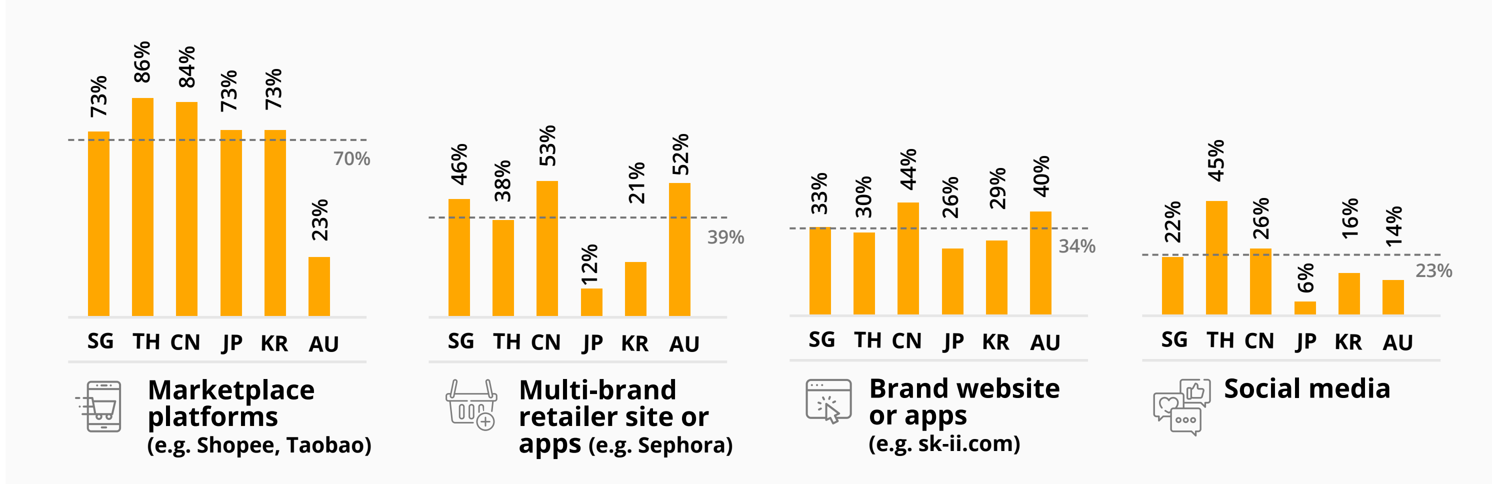
Preferred Purchase Channels

Regional Average

GROCERIES / NECESSITIES



BEAUTY / PERSONAL CARE



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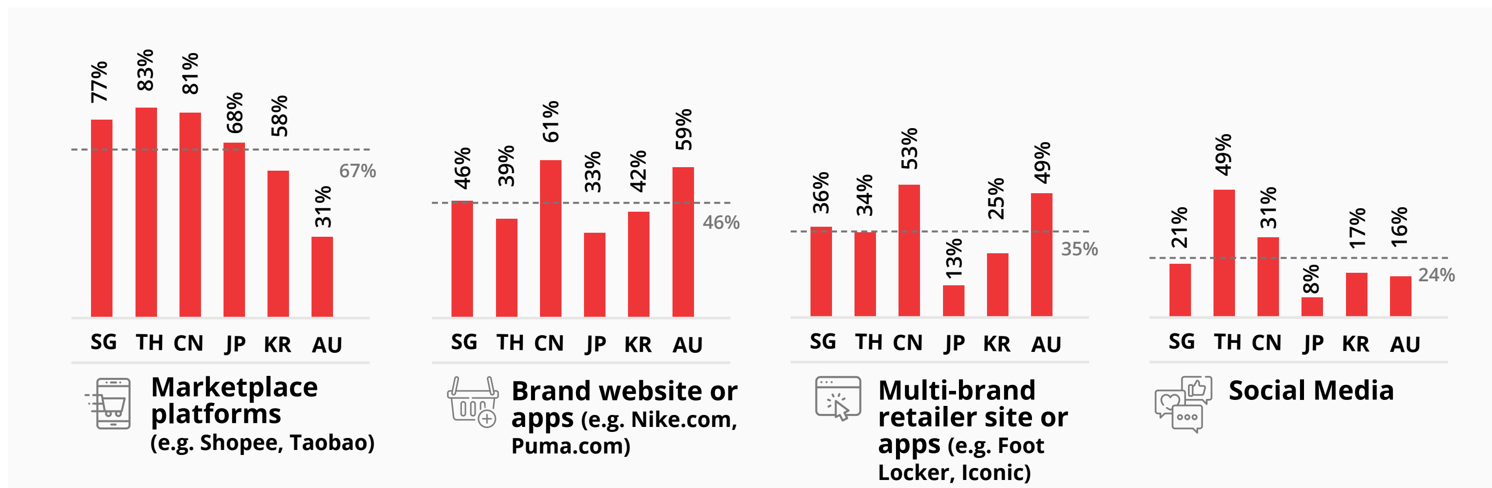
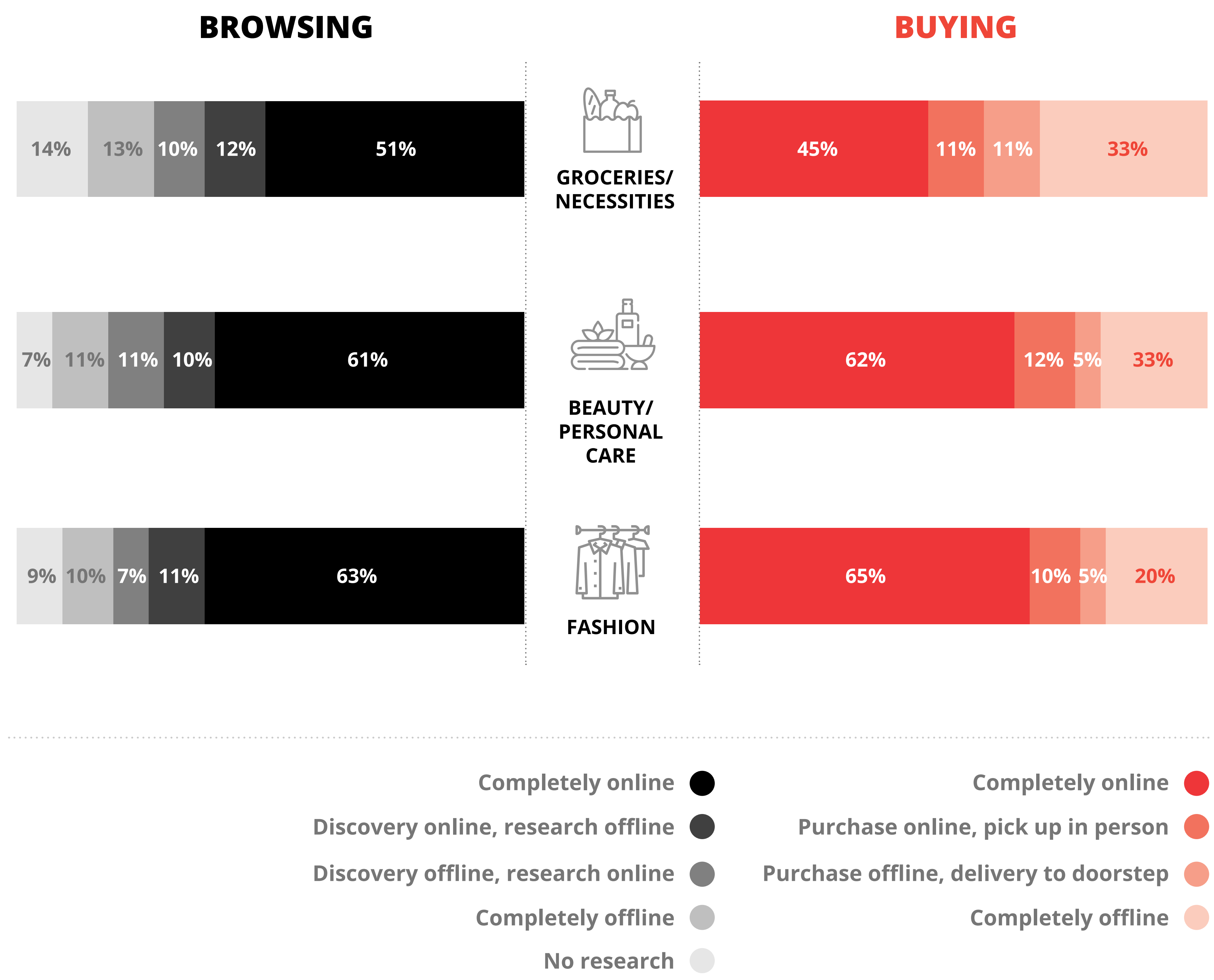


05.01

Blurring Between Online and Offline

Across the region, consumers mainly discover products online (74% vs 26% offline). This is especially true for Gen X and Millennial shoppers, and less so for Boomers+. When it comes to pre-purchase research, between 62 to 72% consumers do product research online, depending on the category. (Groceries/ Necessities are more likely to be researched offline than Beauty/Personal Care or Fashion.) This is true regardless of where the product was discovered.

Category differences start to become more evident once we move down the shopper's journey. Groceries are almost as likely to be purchased and delivered online vs offline. Beauty/Personal Care and Fashion products are 50% more likely to be bought online than Groceries/Necessities.

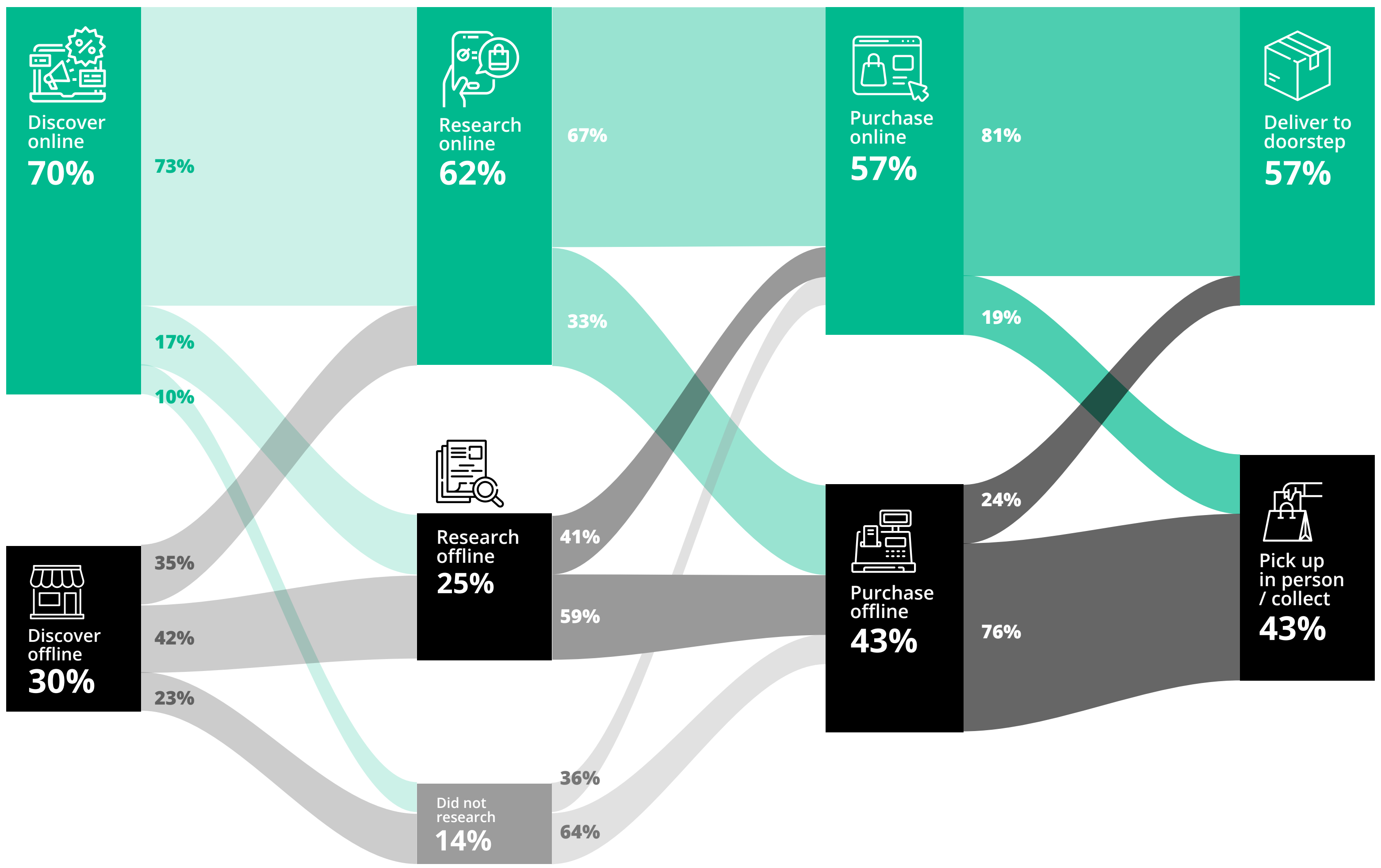


05.02

The New Shopper Journey

We know that the shopper journey is more multi-channel than ever, with a myriad of discovery, research, and delivery options. Our research shows a tapestry of behaviours, where shoppers criss-cross between online and offline behaviour throughout the journey.

GROCERIES/NECESSITIES SHOPPER JOURNEY



Discovery

Product discovery mainly happens online, with China, Thailand, and South Korea more prevalent than Singapore, Japan, and Australia

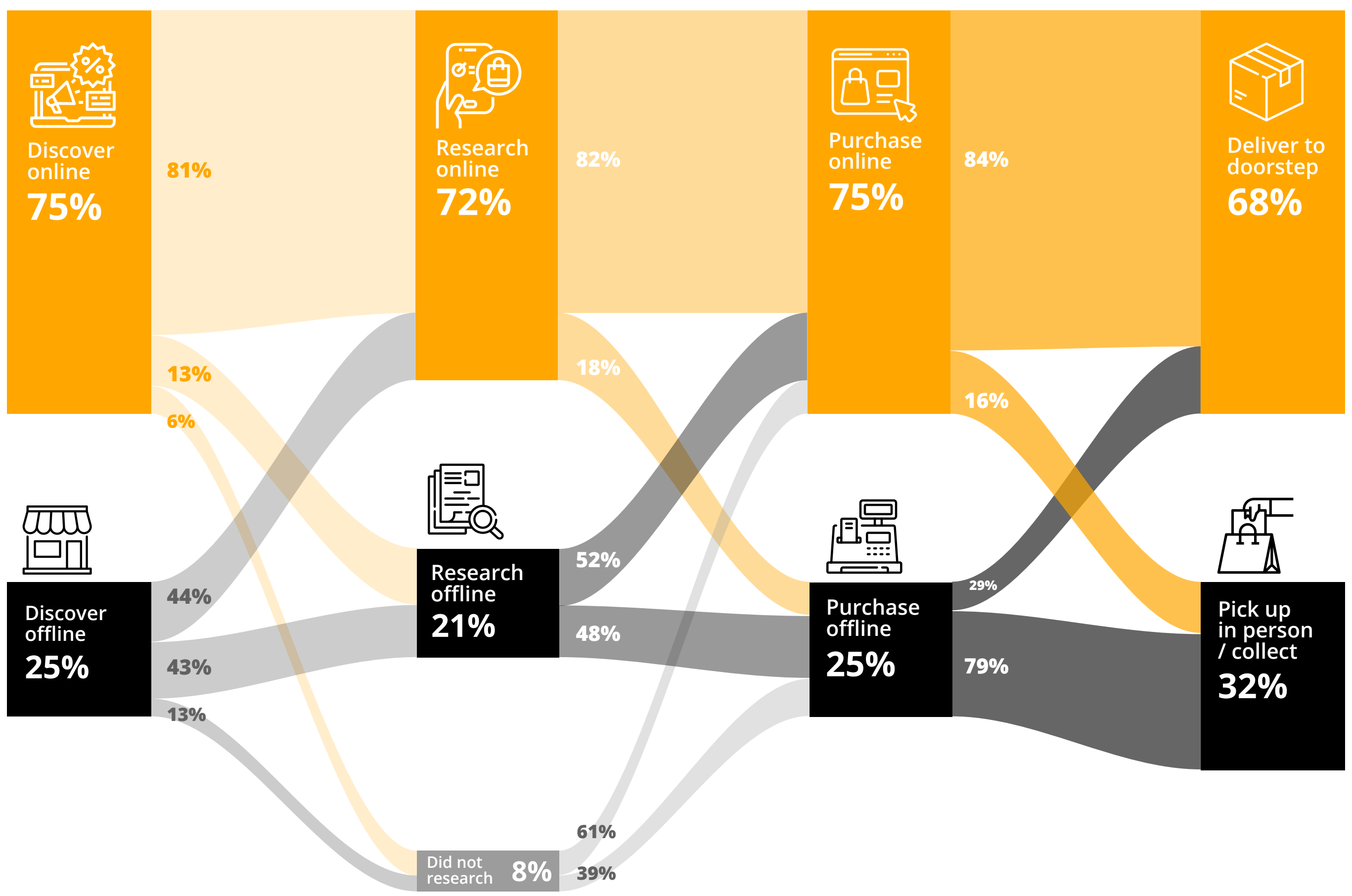
Purchase

Two-thirds of purchases happen in the same format as discovery. If you found something online, you'll purchase online

Delivery

Four out of five who purchase online delivers to doorstep, with the exception of China and Australia, who are more likely to opt collecting their goods via a pickup point or "click and collect"

BEAUTY/PERSONAL CARE - REGIONAL SHOPPER JOURNEY



Discovery

The "outliers": Thailand skews significantly higher for online research (80%), Japan for offline research (33%), and Australia for not researching at all (21%)

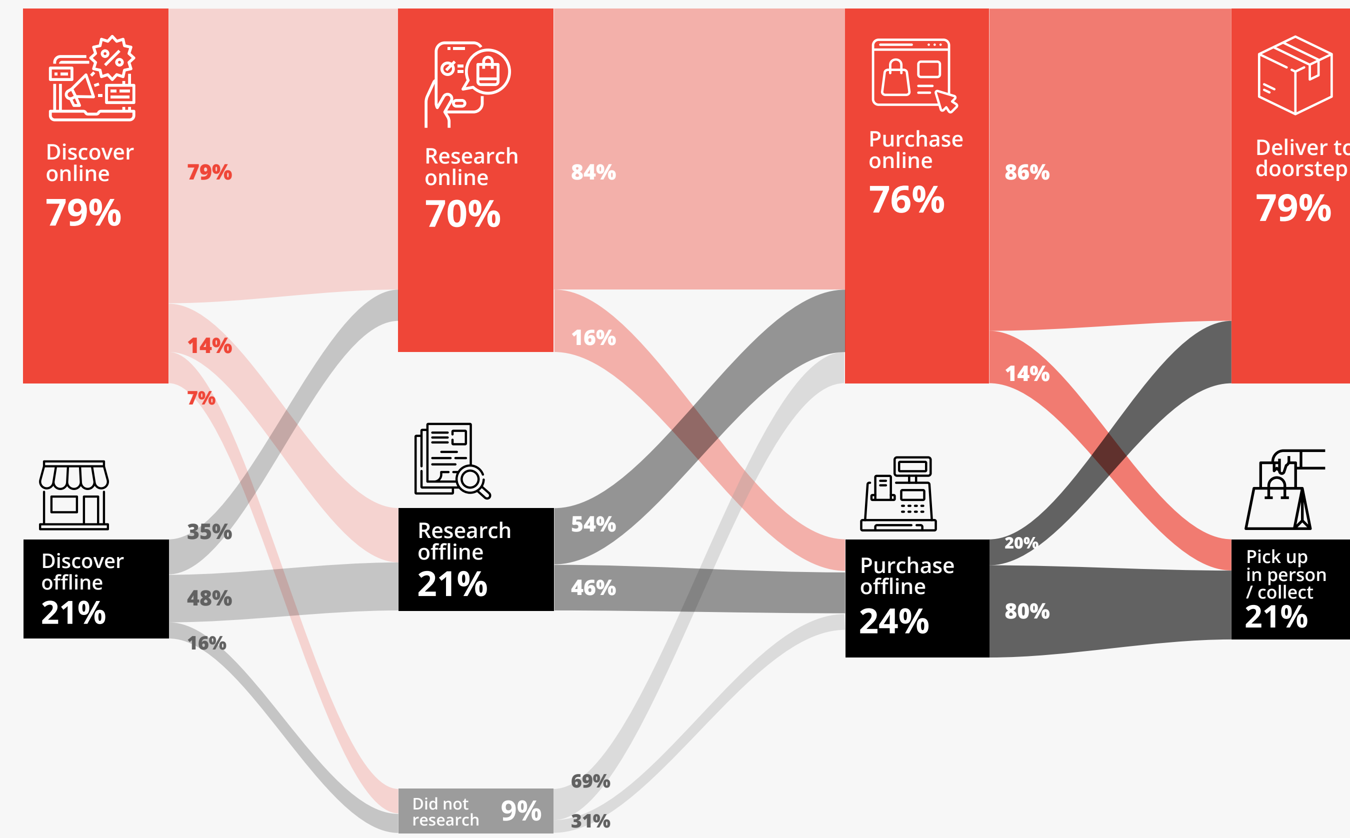
Purchase

Three in four purchase beauty/personal care online. But over 80% Chinese, Thai, and Korean shoppers buy online, while 42% Aussies purchase offline

Delivery

Most choose to have their goods delivered to their doorstep (68%). However, collecting goods via a pickup point or "click and collect" is most common in Australia and China

FASHION - REGIONAL SHOPPER JOURNEY



Discovery

Product discovery mainly happens online, but offline discovery is slightly more prevalent in Japan

Purchase

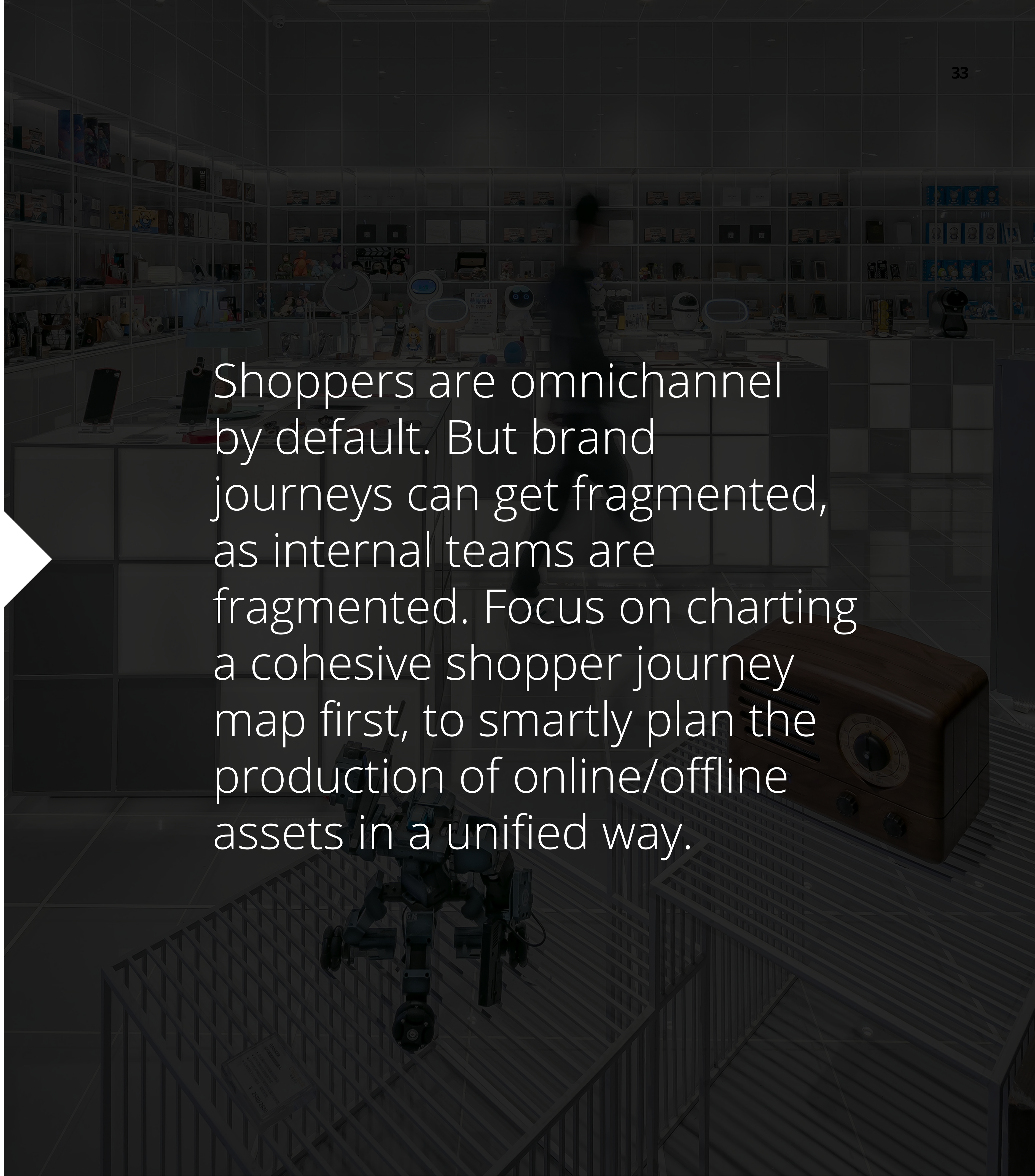
Three in four purchase fashion online. But similar to product discovery, Japan has the highest rate of offline purchase. Online purchase is highest in Thailand, South Korea and Singapore

Delivery

Most shoppers (seven in ten) opt for doorstep delivery. But collecting goods via self-collection at a pickup point or "click and collect" is most prevalent in China

Omnichannel Shopping: The Takeaway

Omnichannel shopping has ceased to be an industry buzzword, and is now a daily reality for most shoppers. Consumers are now firmly in the driving seat, dictating brands meet them when, where, and how they shop. But beyond consistently meeting shoppers where they shop — itself a challenge — leading brands must now think about how best to meet consumers where they live. This means connecting not only on transactional channels, but — using the example of running shoes — showing up where joggers join running clubs, research nutrition, etc. It's about targeting a share of life, not just share of market.



Shoppers are omnichannel by default. But brand journeys can get fragmented, as internal teams are fragmented. Focus on charting a cohesive shopper journey map first, to smartly plan the production of online/offline assets in a unified way.

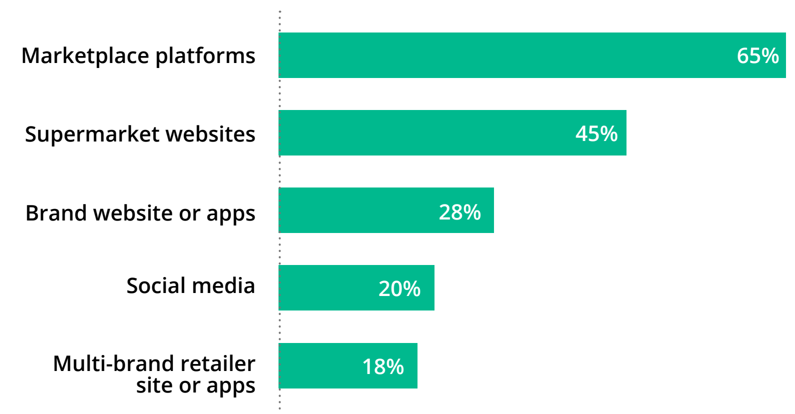
06

COUNTRY & CATEGORY PROFILES

While APAC is one region, its markets are anything but uniform. Online-first markets, like Thailand and China, prefer digital channels and over-index on social proof and influence in decision-making. More traditionalist markets, like Japan and Australia, prefer offline channels — especially during purchase — and value brand trust or brand-driven communication.

Groceries/Necessities

Typical purchase channels

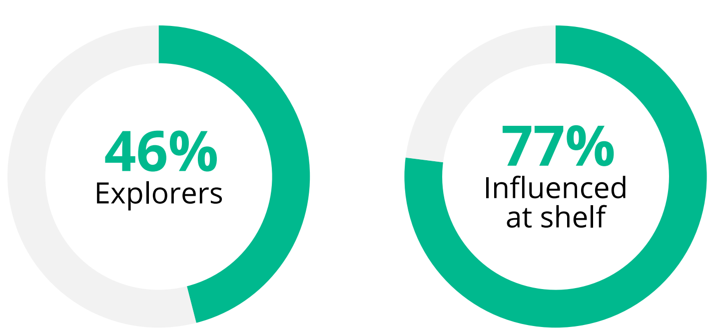


INFORMATION LOOKED FOR

Product specifications	61%
User testimonies / ratings	46%
How and where to use the product	39%

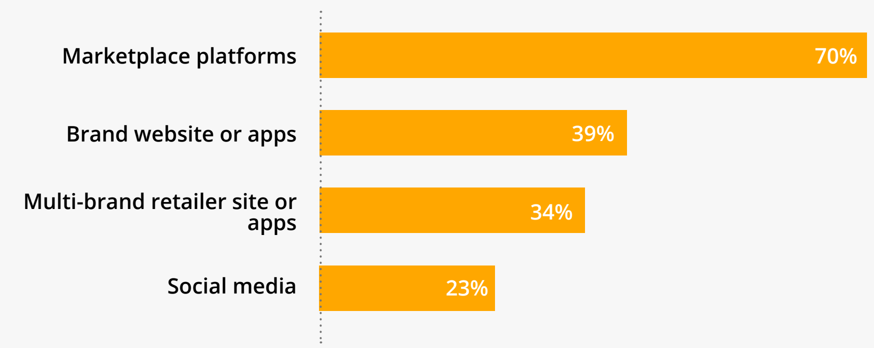
STEPS TAKEN BEFORE PURCHASE

Check for discounts or promotions	68%
Compare against similar products	57%
Check product reviews or ratings	55%



Beauty/Personal Care

Typical purchase channels

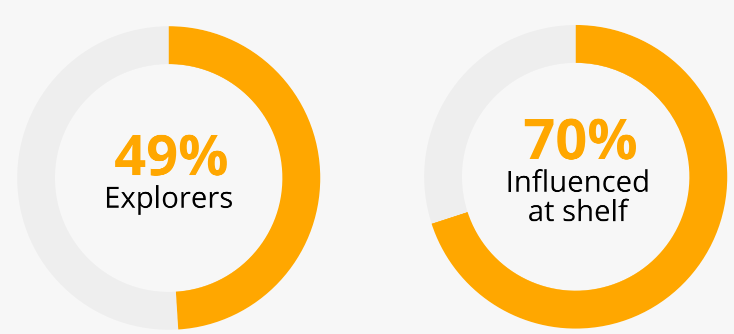


INFORMATION LOOKED FOR

Product specifications	60%
User testimonies / ratings	49%
How and where to use the product	423

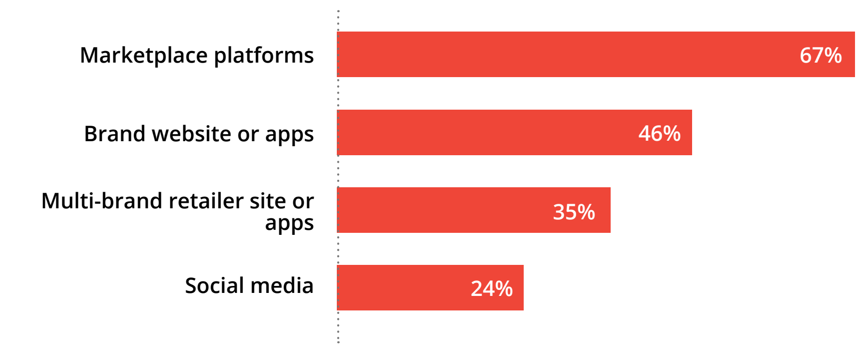
STEPS TAKEN BEFORE PURCHASE

Find out more about product	62%
Check for discounts or promotions	66%
Compare against similar products	57%



Fashion

Typical purchase channels

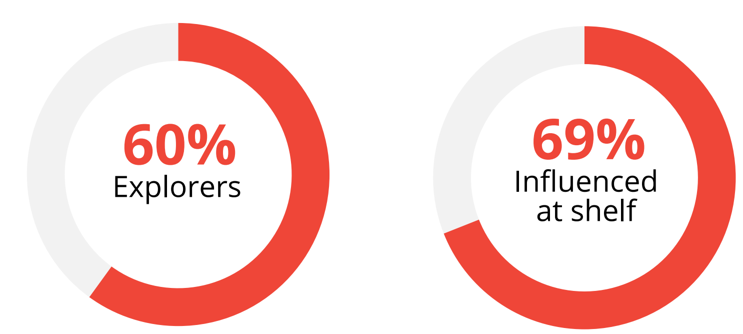


INFORMATION LOOKED FOR

Product specifications	62%
User testimonies / ratings	46%
Production quality and process	42%

STEPS TAKEN BEFORE PURCHASE

Find out more about product	60%
Check for discounts or promotions	65%
Compare against similar products	52%



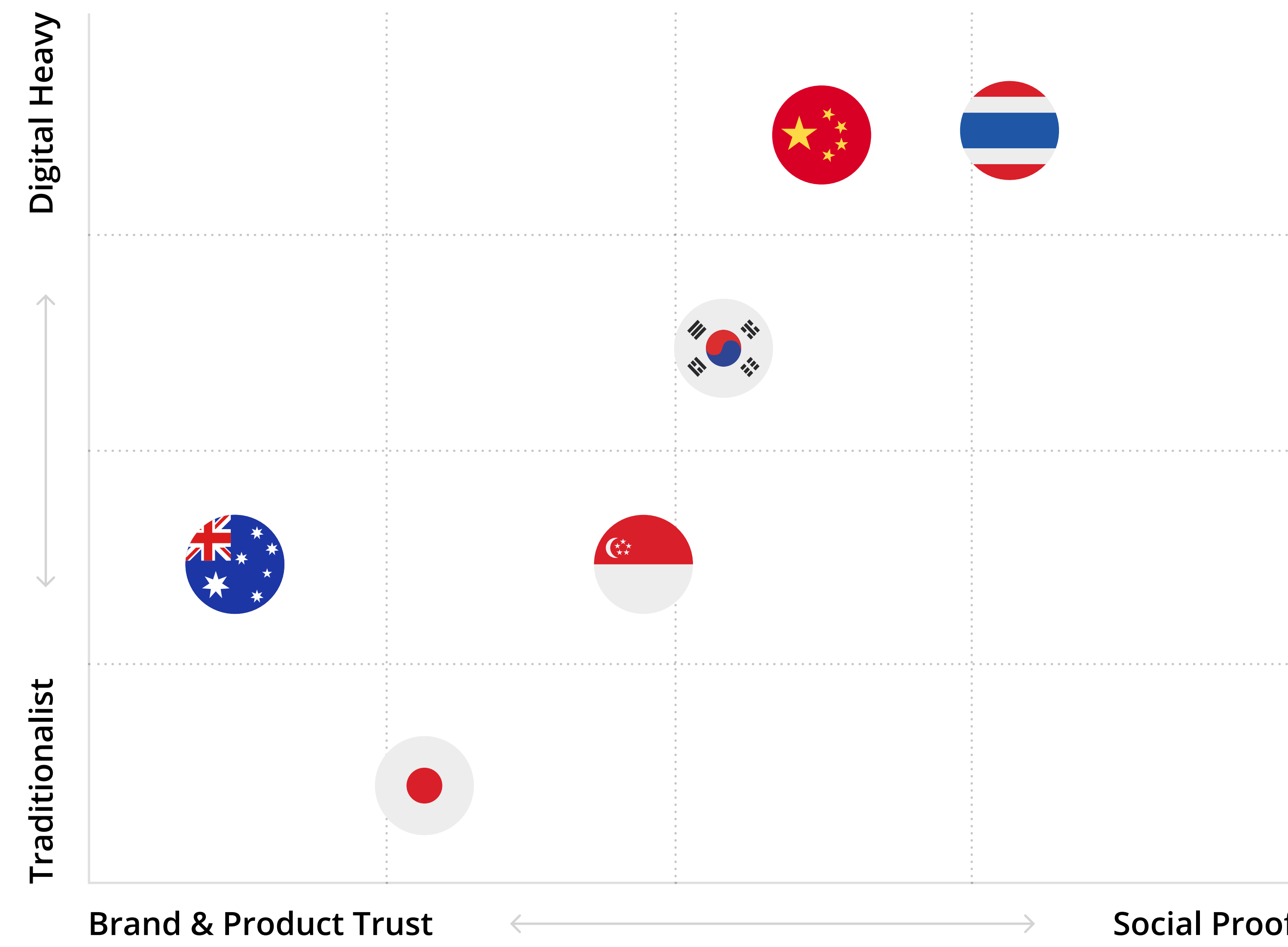
Market Archetypes

SOCIAL-ORIENTED

More influenced by content from creators and are more likely to trust their intuition when buying, without doing additional research

PRODUCT-ORIENTED

More influenced by content that focuses on informational aspects (e.g. features, visuals,specifications, price) — and are more discount-driven

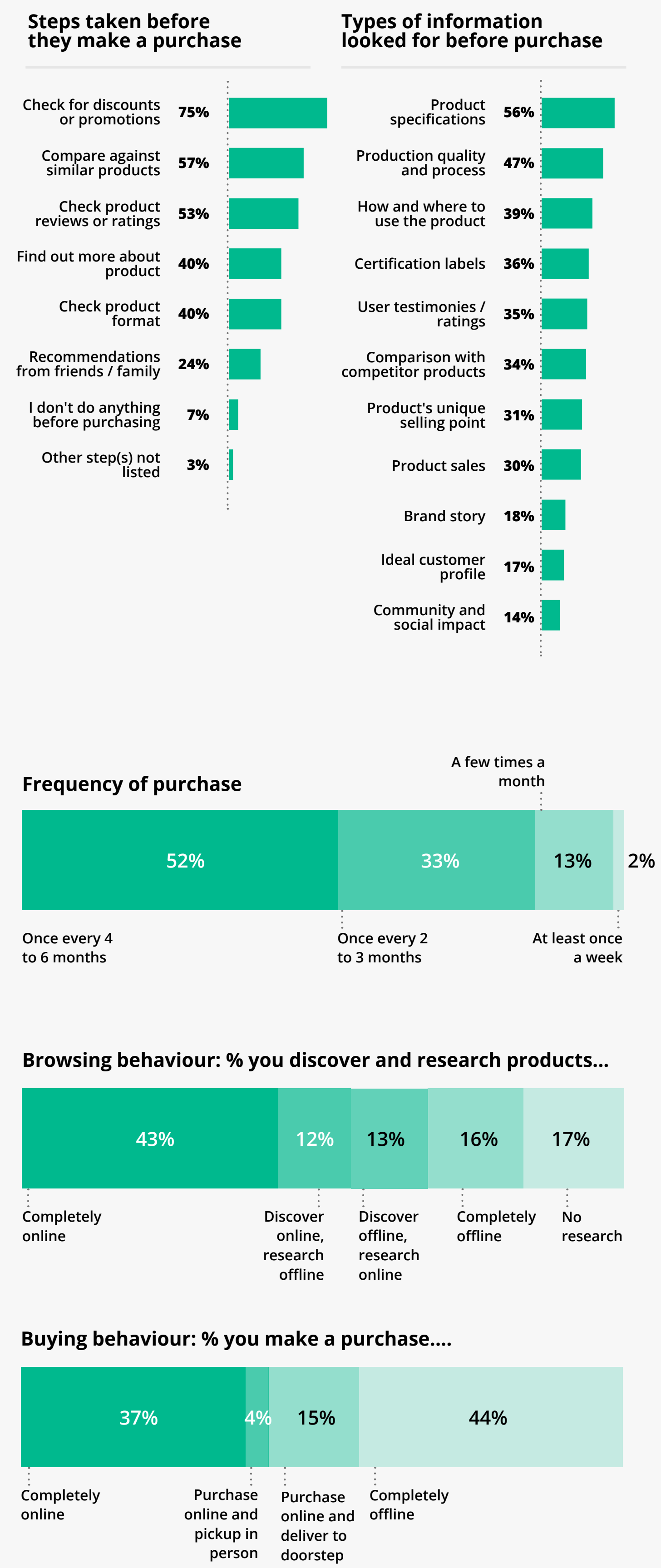


Singapore:

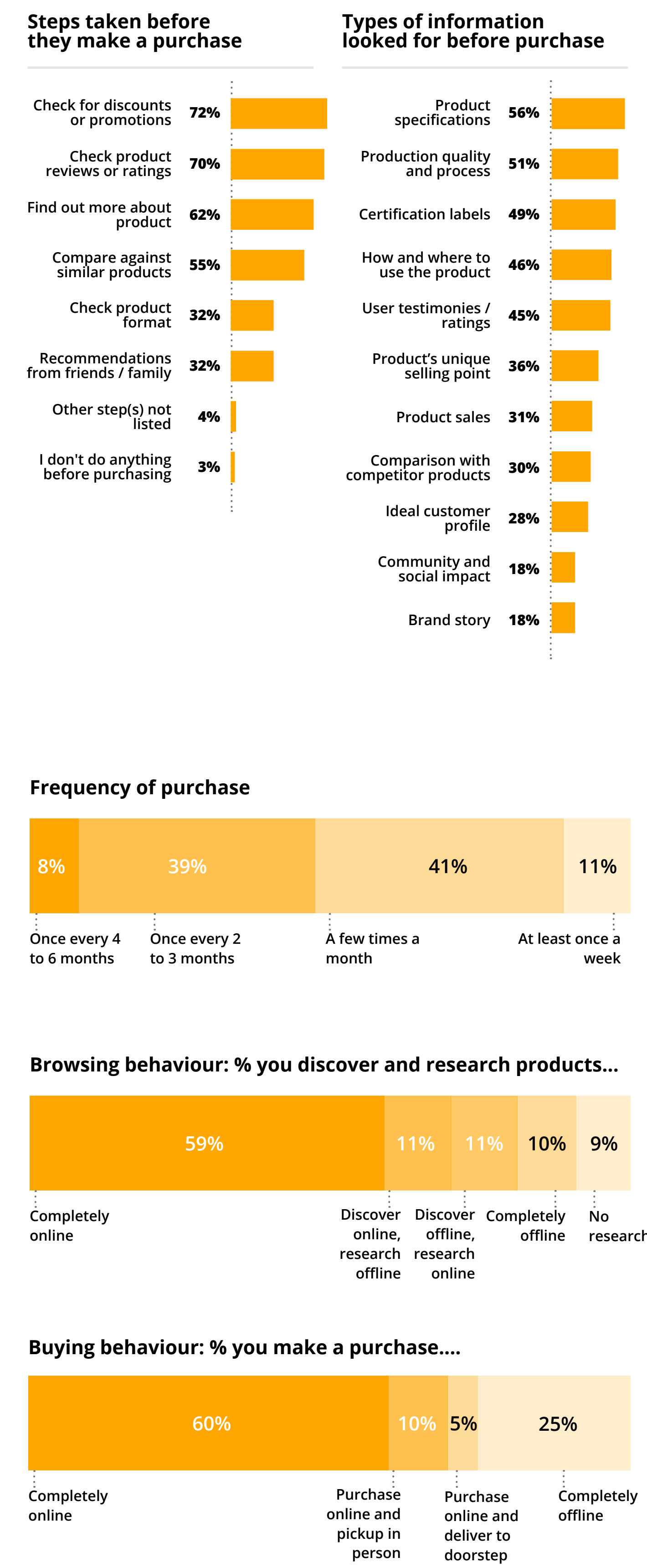
Detail-Oriented & Functional

- Singaporean shoppers prioritise detailed product information, clear presentation, and high-quality images, reflecting a detail-oriented shopping culture, as **58% highlights “insufficient product information” as their main pain point.**
- No surprise here–bargain hunting is a national sport! And “checking for discounts” is the first thing shoppers do, even resorting to cross-border shopping for lower prices and wider product variety
- Despite being digital savvy, **14% of the shopper journey happens completely offline**, reflecting shopping’s role as a whole family, whole day social experience
- Singapore’s high trust in the delivery process contributes to the success of e-commerce, facilitated by a well-developed logistics infrastructure
- 82% of Singaporean shoppers experience a higher incidence of pain points – such as inconsistencies and insufficient information — influencing their purchasing decisions
- E-commerce and marketplace platforms are the dominant channels of discovery, but digital ads also have a larger role to play in Singapore compared to the region (44% vs 32%)

GROCERIES / NECESSITIES



BEAUTY / PERSONAL CARE



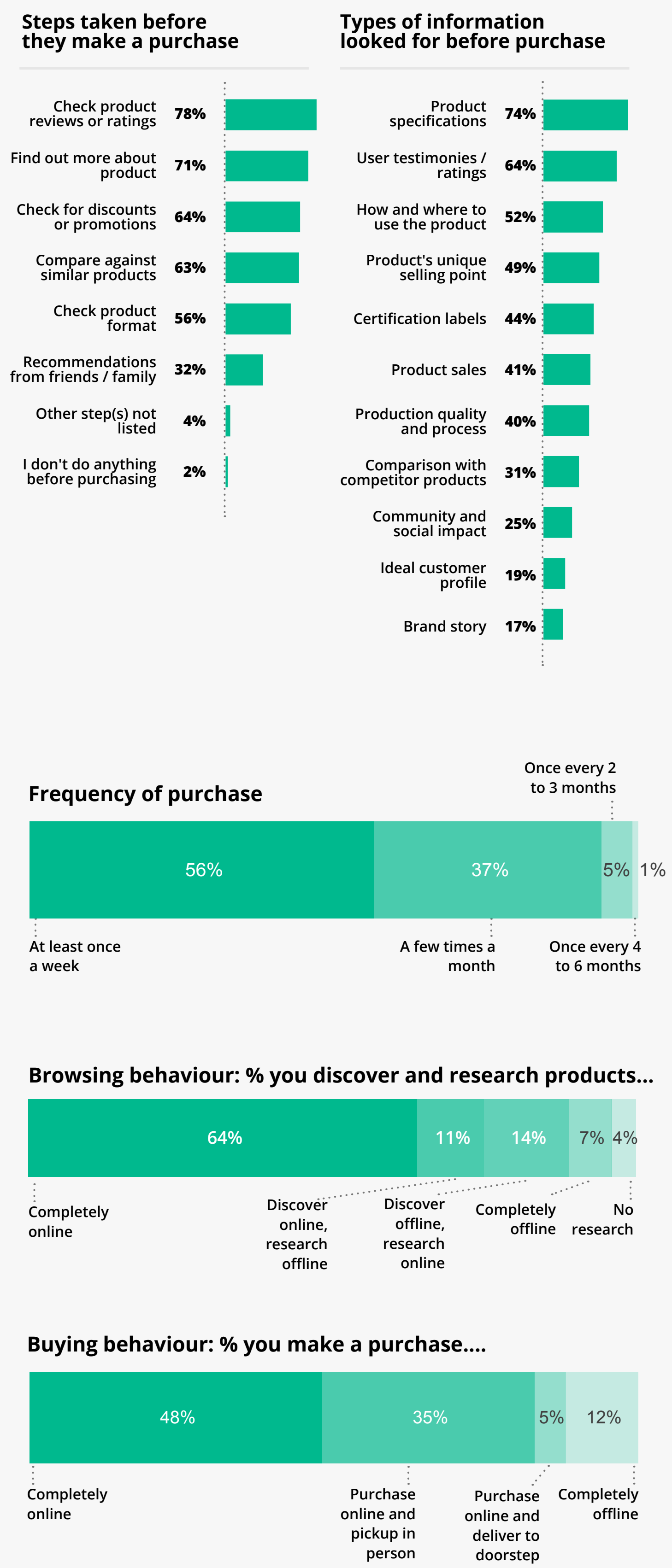
FASHION

China:

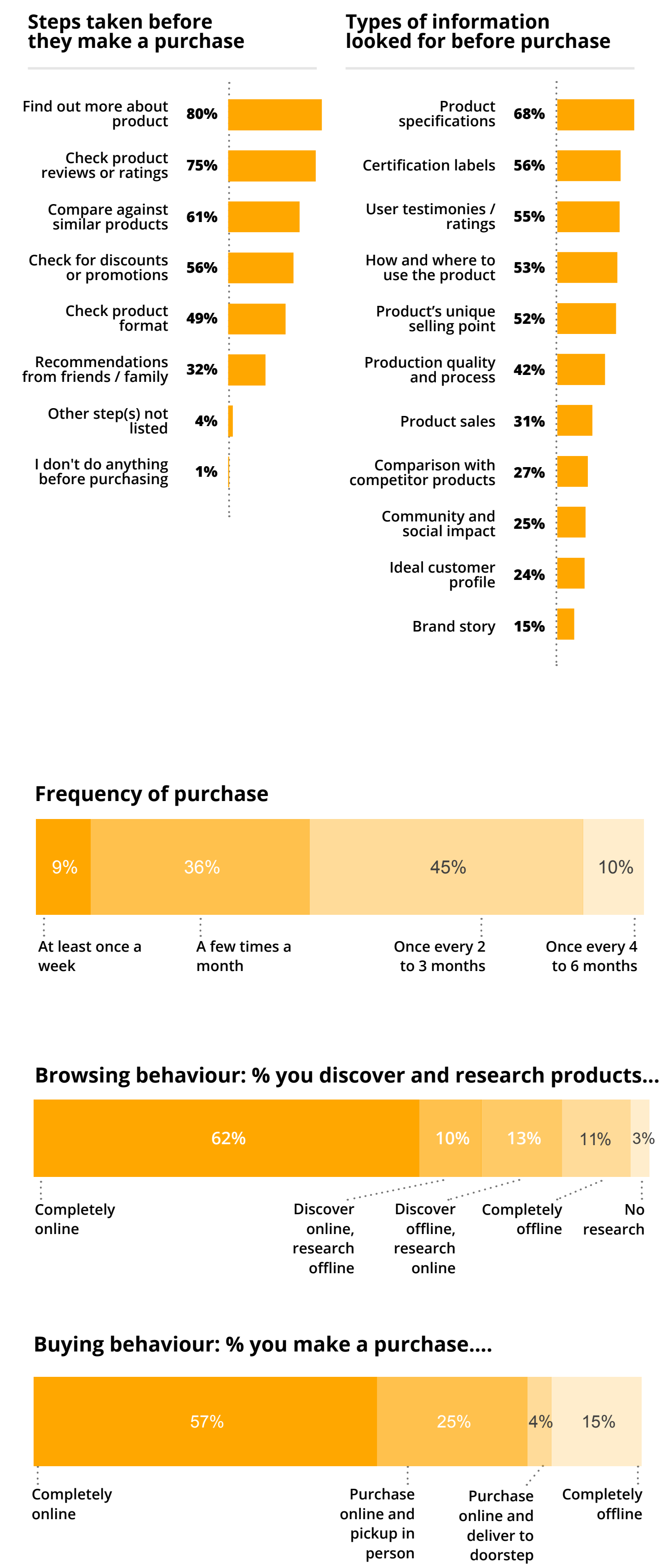
Info-Hungry - "More is Better"

- Highly competitive, with millions of offerings — in the region's fastest moving digital market, products often struggle to stand out with **"Too many similar products"** being the #1 barrier to product selection
- To make sense of the noise, Chinese shoppers are studious — on average, they look for the most amount of info in every category, **Product Specs, Usage, USP, User Testimonials, & Certifications** being top
- In a country wary of fakes, trust is an issue, which is why the prevalence to look for **Certification** labels and **User Testimonies** as proxies are so high
- Reflecting the country's herd mentality (ex. "If others buy it, it must be good"), the region's highest prevalence to check **Product Sales** also acts as a proxy for quality
- Equally high is shopper's attention paid to **Community and Social Impact**, which — alongside Thailand — is the highest in the region
- While occurrence of **inconsistent product information** isn't the highest in region (#2 at 87%, vs South Korea at 88%), it most negatively impacts Chinese shoppers. A whopping 33% of shoppers say inconsistencies will greatly deter them from buying the product again.
- Completely offline journeys are rare compared to say, Singapore & Japan. Reflecting the paucity of building managers and secure delivery lockers, China has the highest incidence of **online purchase, delivered to pick-up point.**

GROCERIES / NECESSITIES



BEAUTY / PERSONAL CARE



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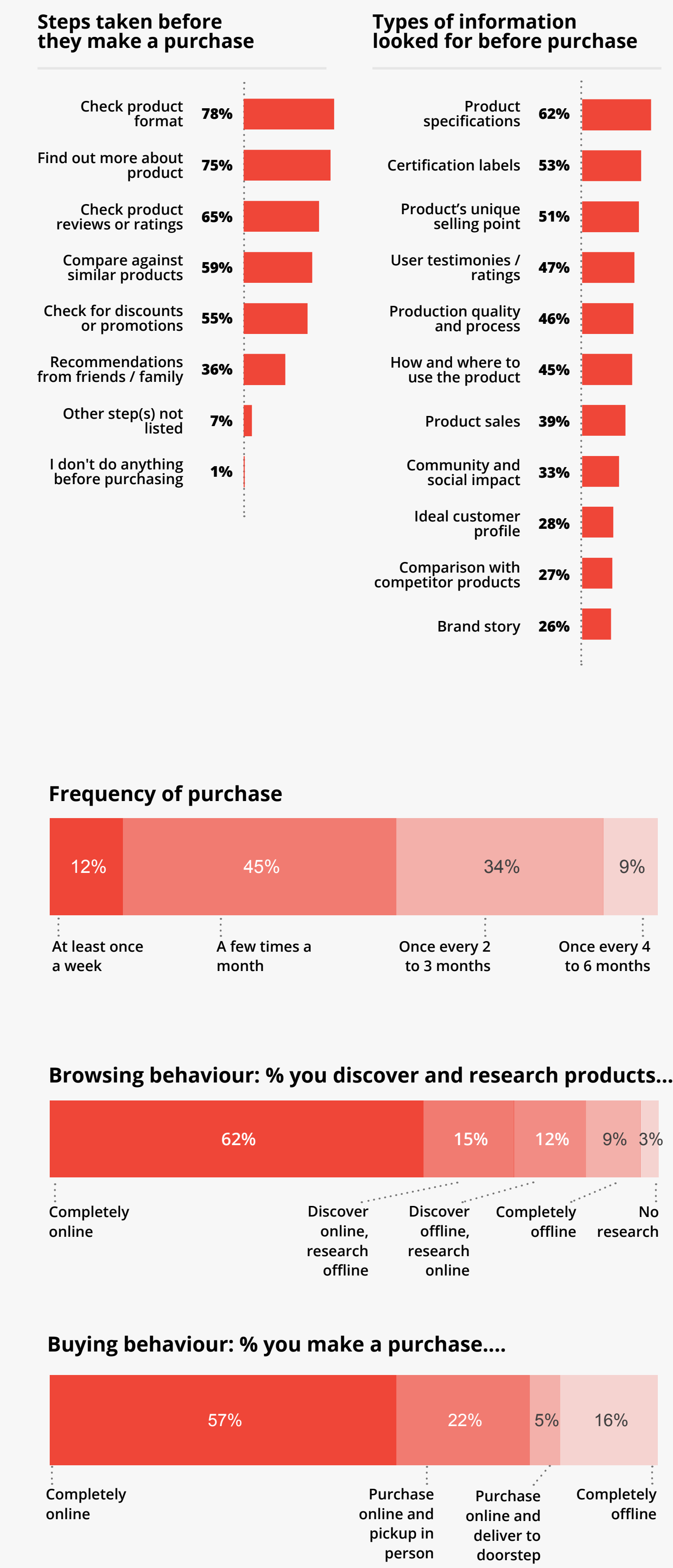
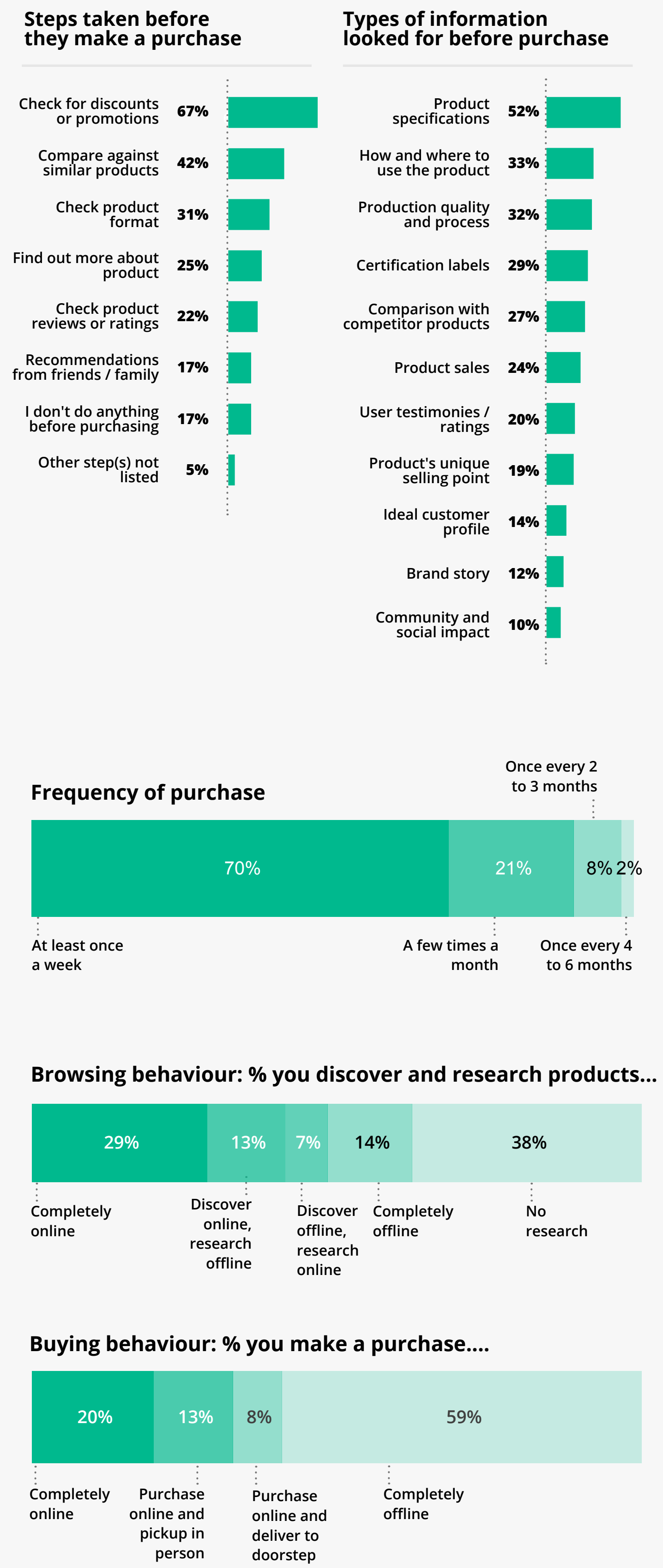


Australia:

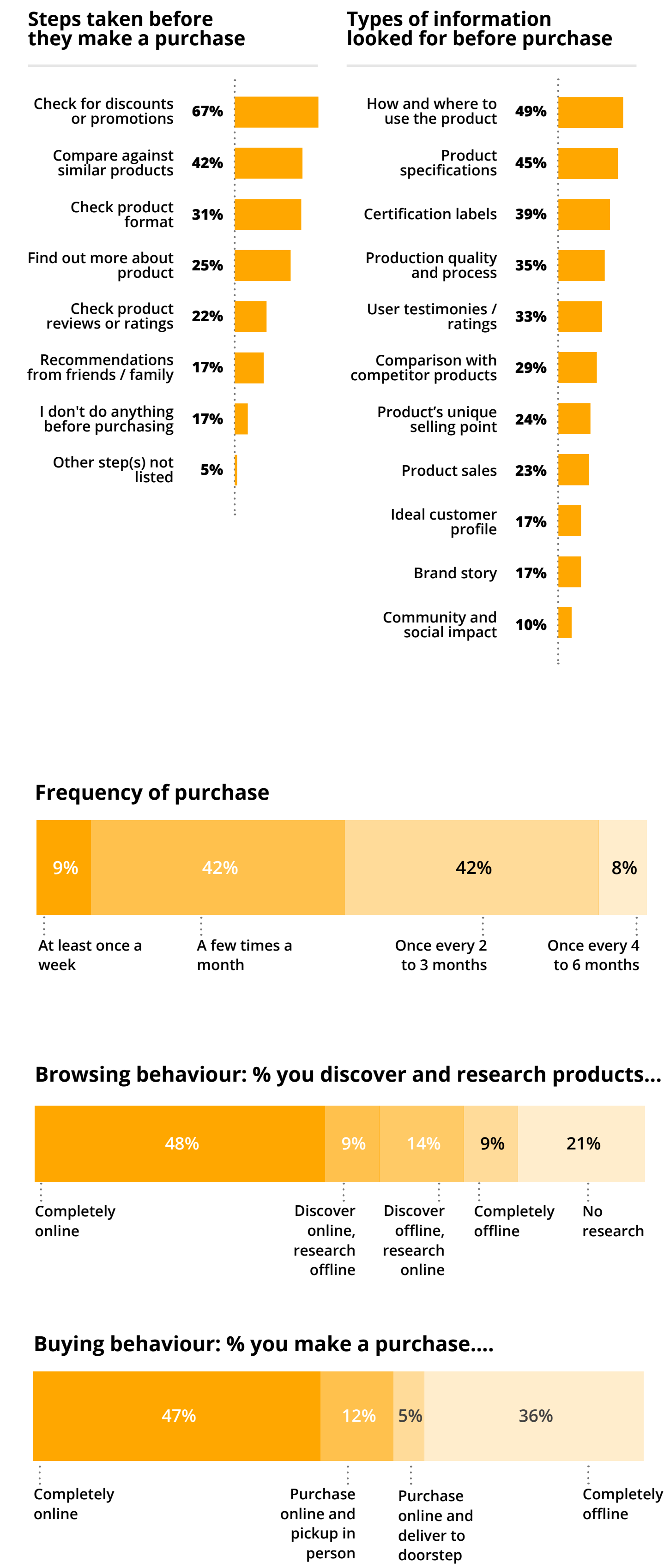
High-Touch, High Trust

- Mirroring another high-touch market (Japan), the two markets have shown the **least amount of change** in Discovery and Research phase behaviour vs. three years ago. This can mean slower pace of change, but also an opportunity to learn from faster markets.
- **Australian shoppers still prefer physical stores over other channels.** Discovery and purchase are done offline more commonly than other markets.
- **Only 1/3 of Australians prefer to shop for groceries online**. With high shipping costs, of those that do, nearly 3/4 choose to take their purchases home from a pick-up point (Click & Collect) rather than being delivered to their doorstep.
- As a high trust market where consumers are consistently "Made in Australia" proud, Aussies look at **the least number of pieces of info to research** (2.8 on average) compared to the region. Better in-store experiences, with 41% having live chat assistance (according to separate Newstore research) might also help
- But is that due to not needing them, or to unavailability of information? 79% of shoppers say more product images will entice them to buy more, but 48% say there's insufficient product info — the #1 pain point to product selection

GROCERIES / NECESSITIES



BEAUTY / PERSONAL CARE



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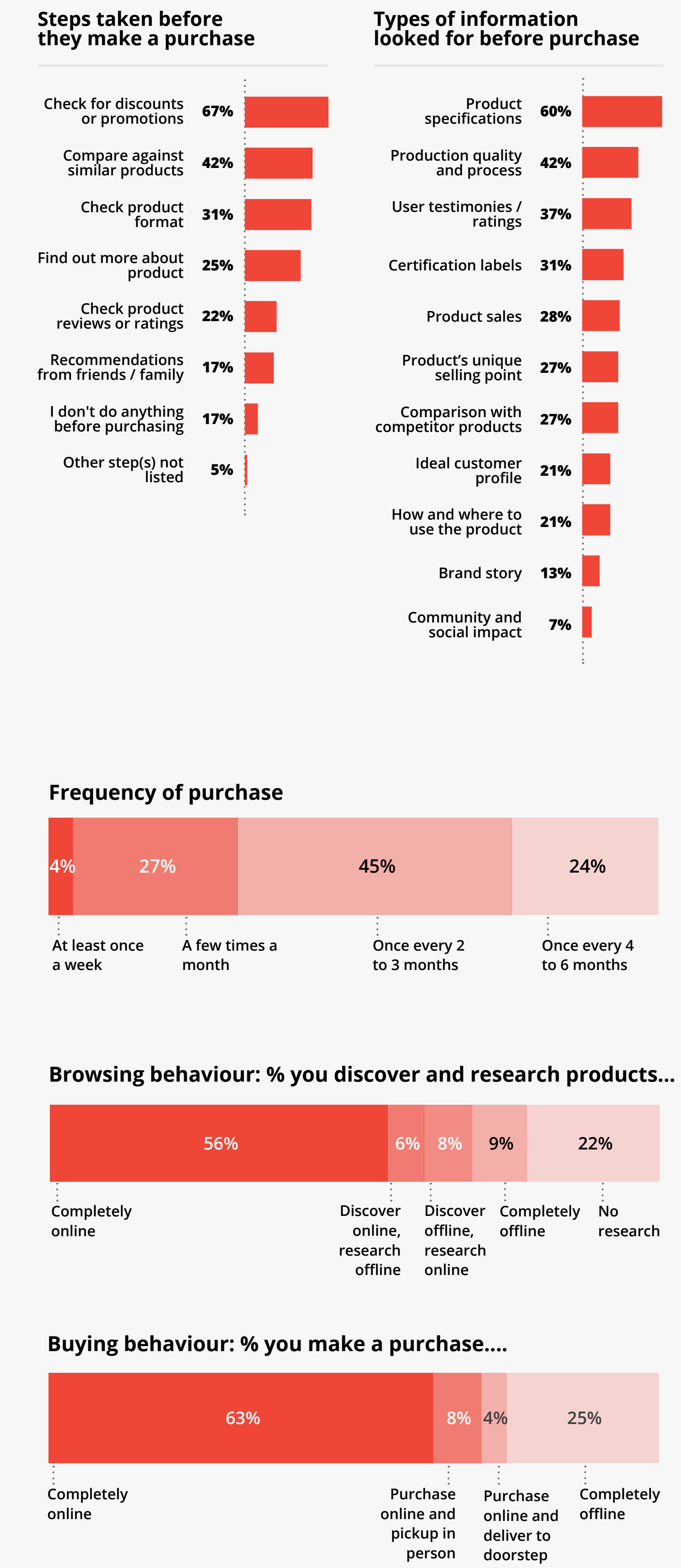
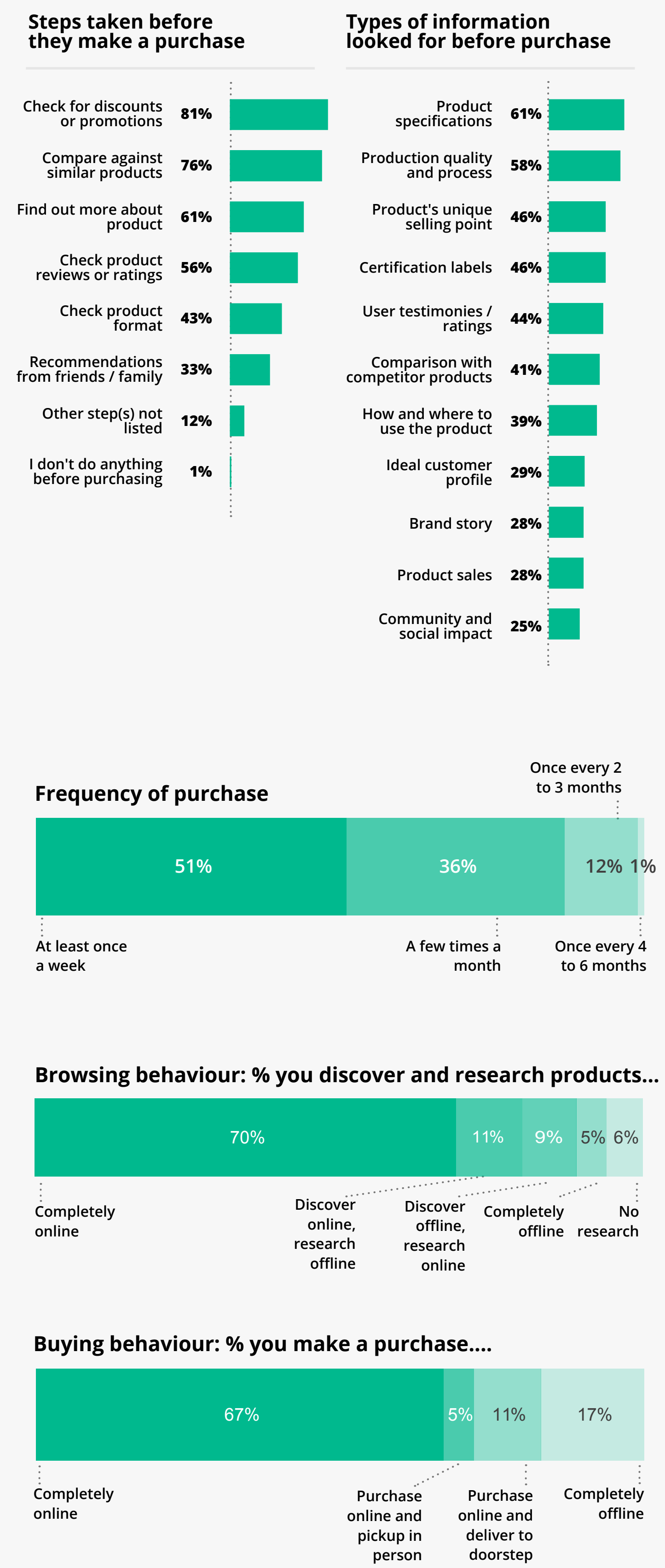


Thailand:

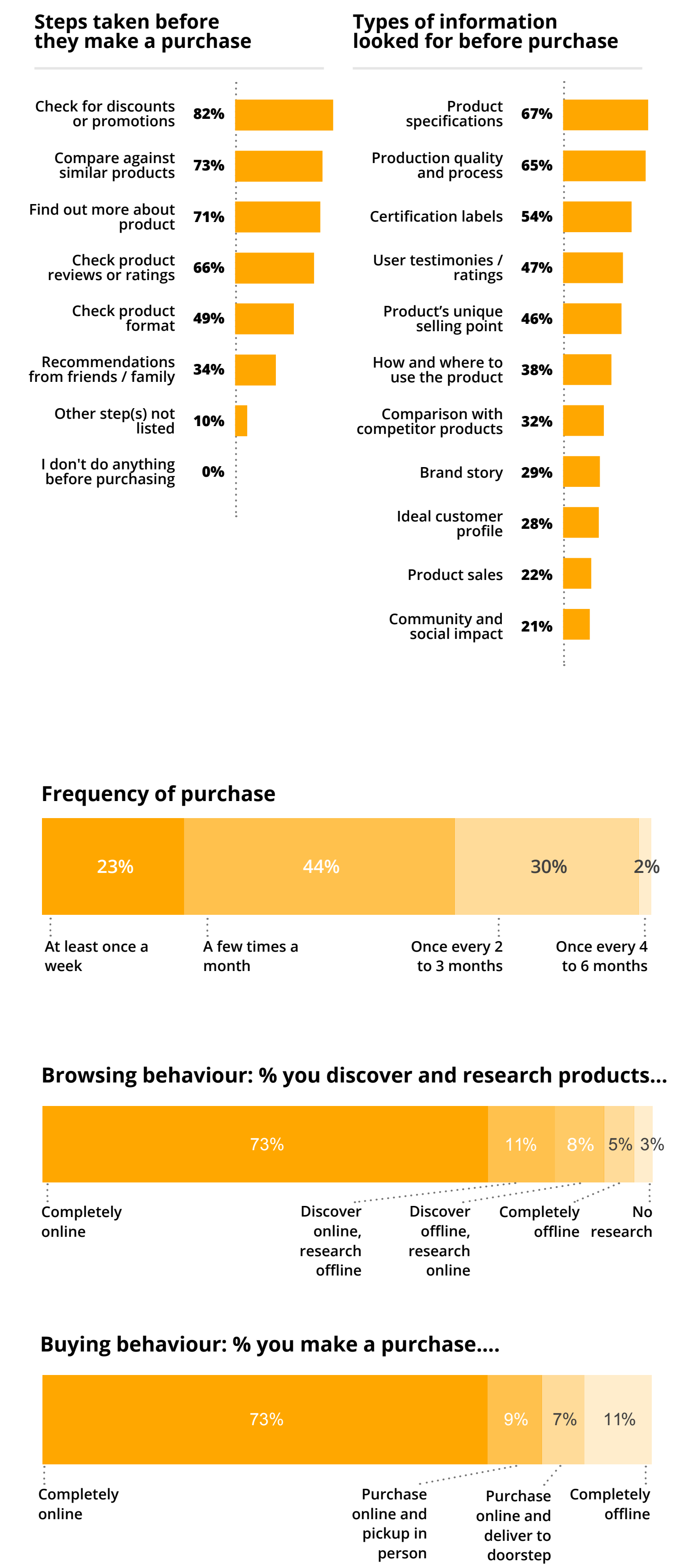
Social Shoppers

- Thais are more likely to go through **the entire shopping journey online** — from discovery to delivery. But there is still an urban-rural divide, where urbanites look for quality and lifestyle affirmation, the mass blue collar driving livestreaming, and rural populations more tied to traditional trade.
- They're also the most social of shoppers — either #1 or #2 in region in terms of **increased follows of brands on social media, influencers, and livestreaming** — the latter letting viewers access, review, and buy a wide array of products with richer engagement
- This extends to shopping on social media. **Almost half of Thais have shopped on social media platforms** such as Line & TikTok Shop, across all categories — reflecting how common it is for local influencers to create their own products and brands
- Like China, Thais **review the most pieces of product info**. Special attention is given to **Production Quality and Certification Labels**, reflecting functional needs for trust. But on the other hand, Thais are the most open and attracted to the romance of **Brand Stories** as well.
- Reflecting the culture's strong value for social capital and proof, Thais look heavily to influencers for product discovery and research, and most **fit into the explorer + easily influenced category**
- Brand trust is built through reviews, and Thais rely a lot on **product comparisons** for research. They're also highly visual shoppers, with a whopping 54% strongly saying that "more images will make me buy more"

GROCERIES / NECESSITIES



BEAUTY / PERSONAL CARE



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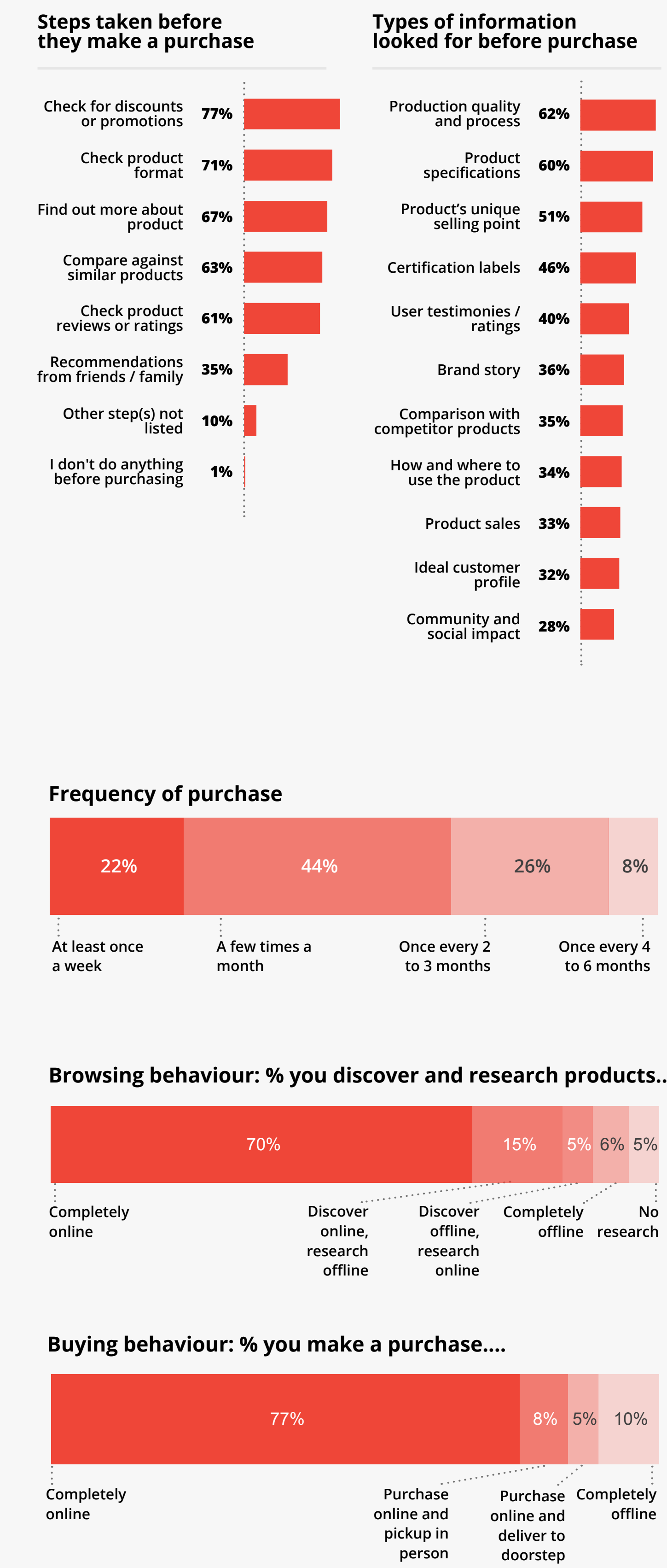
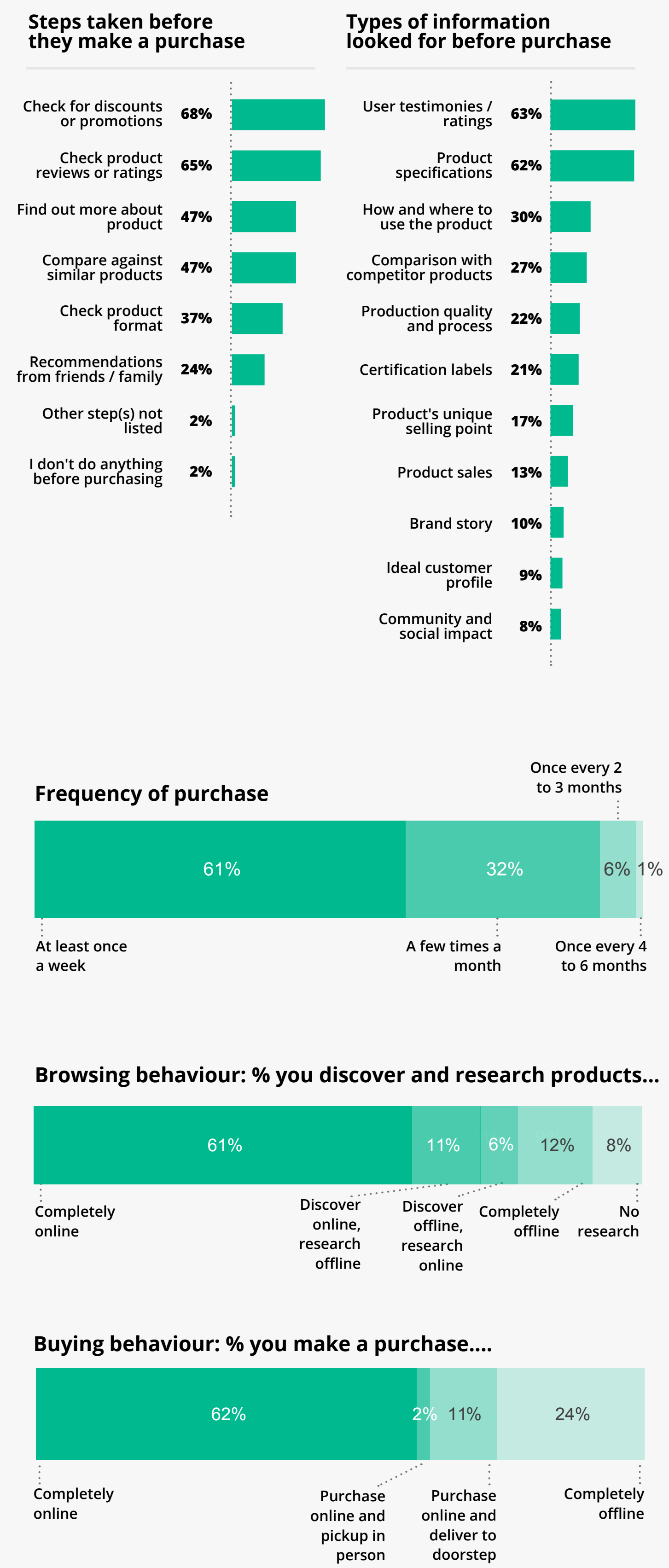


South Korea

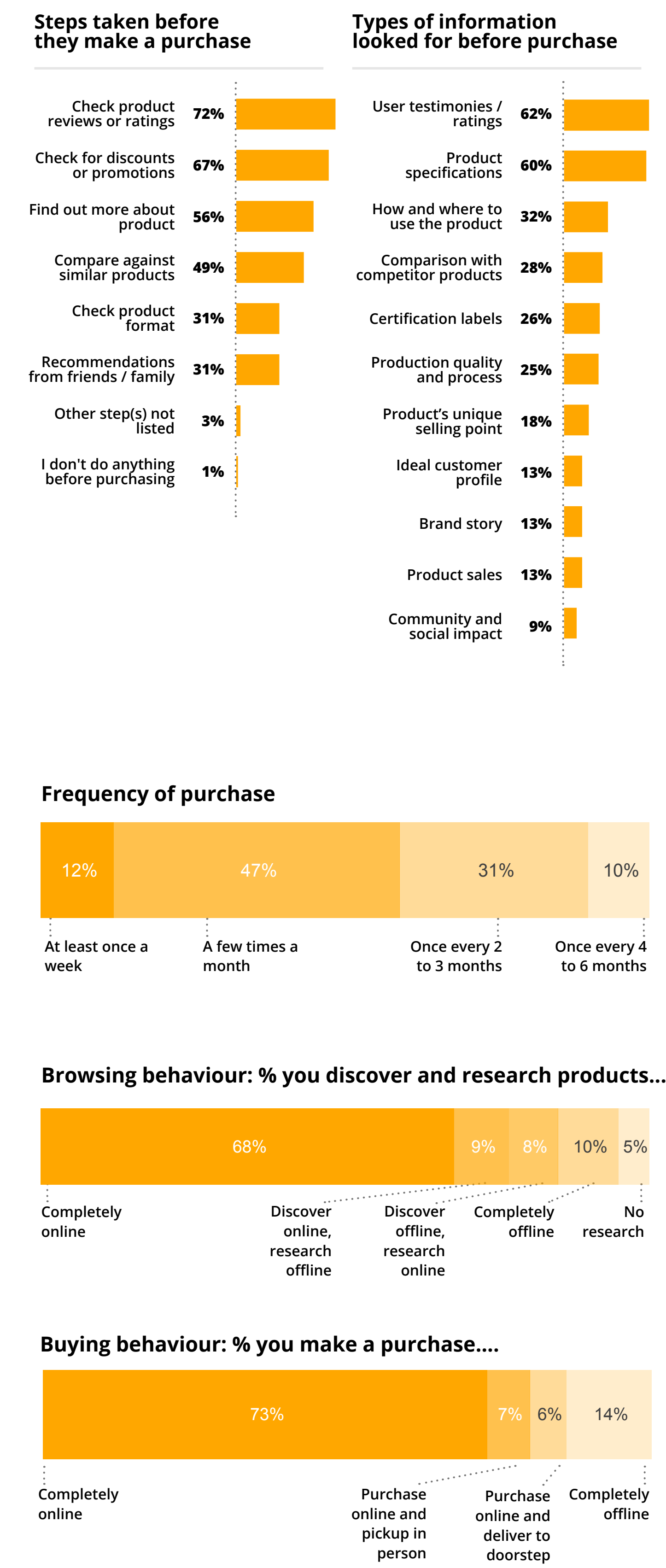
Digital Savvy, Social Proof Needed

- Digital-first and digital-heavy, **most of Koreans' journey happens online**, where users stick to big platforms such as Coupang and Naver — not least because users tend to stay loyal due to complicated payment systems
- **Social signalling and proof is key**. Koreans are highly influenced by celebrity endorsements, and by each other, with User Testimonies being the top looked-for product info across categories, at 55%
- Koreans **place high trust in established brands and resellers**, making them the least likely to stop buying a product after encountering product & info inconsistency. Even so, 54% say they will be negatively impacted in terms willingness to buy
- On the flip side, Koreans are quick to notice when a product is of low quality. 53% report **poor product quality** as the most common inconsistency encountered — the highest in region
- Pages with too little info or with too-short Product Detail pages are seen to be not trustworthy. But the attention span wanes with too much info. Hence, PDPs with impactful GIFs, videos, and imagery cut through the clutter best

GROCERIES / NECESSITIES



BEAUTY / PERSONAL CARE



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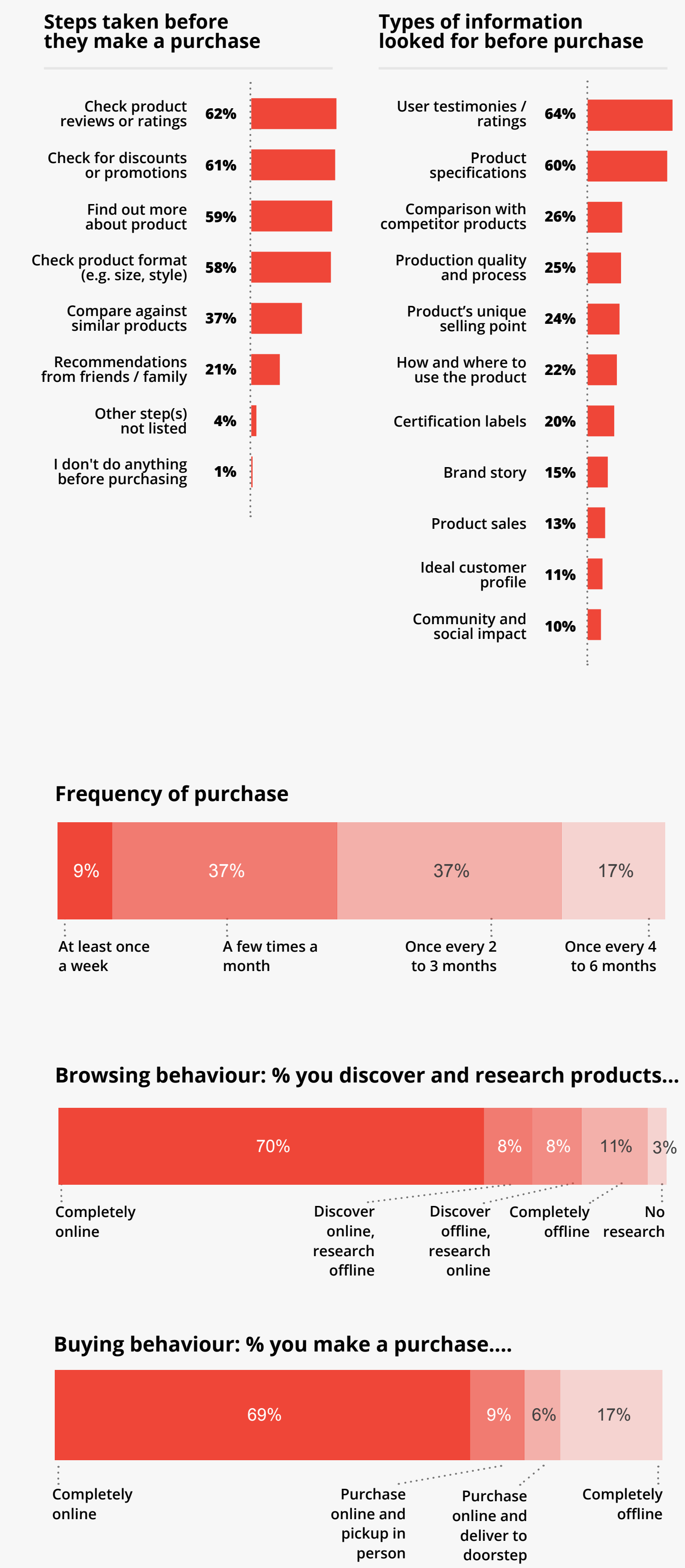
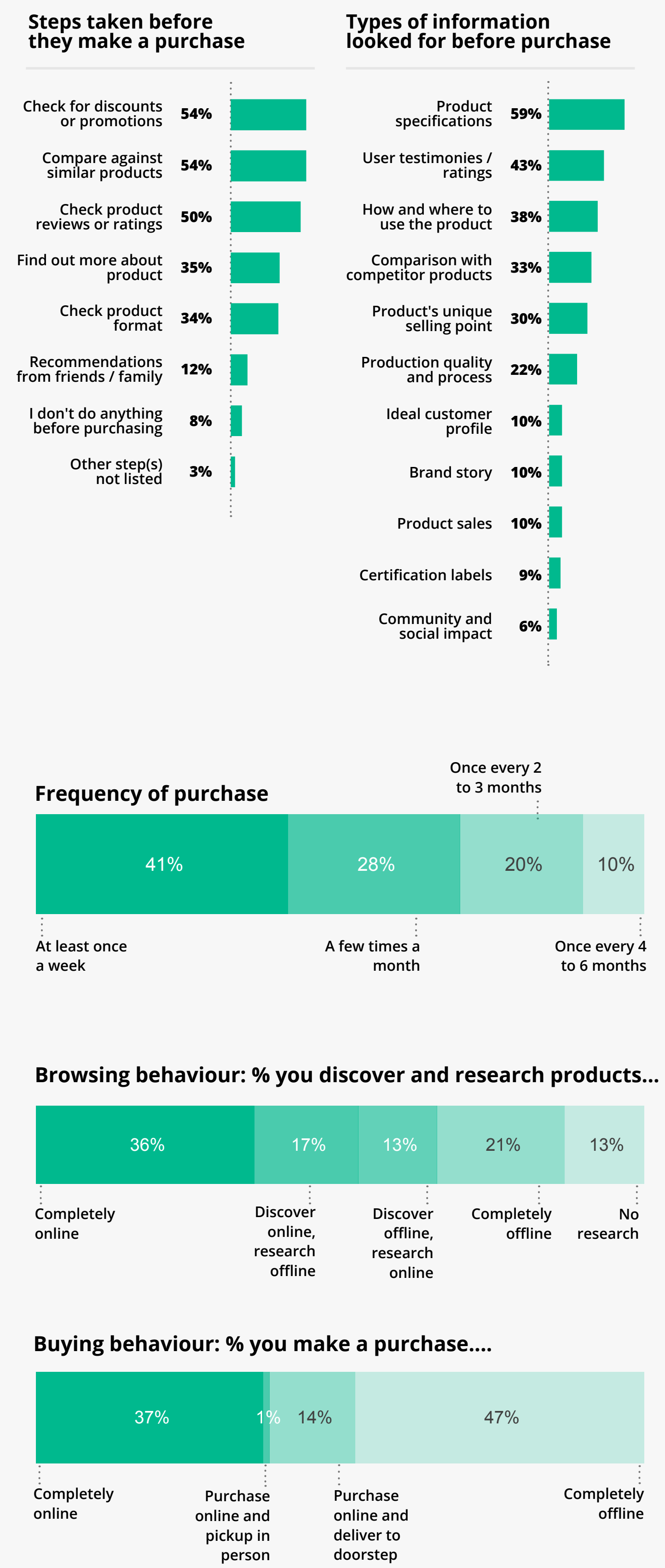


Japan

Info-First, Function-Focused Shoppers

- Japanese shoppers thrive a bit more on familiarity: over two-thirds report that **nothing has changed** in their patterns in the past three years
- Least likely to say "More imagery will drive more sales": Japanese shoppers are **uniquely by culture more text– vs. visual–driven**, highlighting greater needs for SEO and copywriting that converts
- While professing to be targeted shoppers, especially in Groceries/Necessities (42%) and Beauty/Personal Care (37%), Japanese shoppers are nevertheless still open to influence, leading to impulse purchases
- Japanese shoppers take the **fewest steps before any category purchase** (on par with Australia), and look for the fewest pieces of information (around three). This can signal a high context/ trust culture, where shoppers have a baseline expectation of quality, or more efficiency-focused, in/out shopper missions
- **Physical retail is still highly relevant**. Given easy access to retail and convenience stores in dense urban areas, Japanese consumers are hybrid shoppers, involving online research, physical product examination at stores, and online purchases to find better deals or accumulate points

GROCERIES / NECESSITIES



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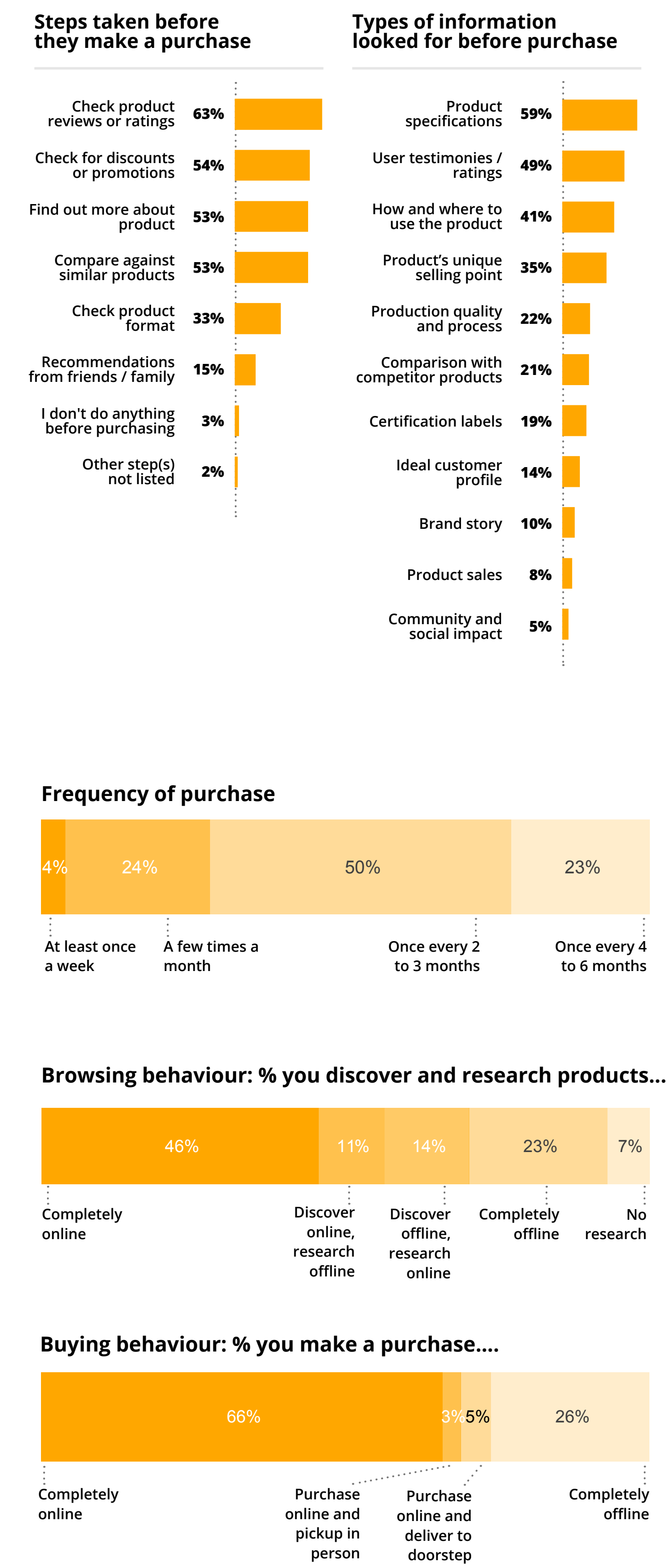

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