



# Shoppertainment: APAC's Trillion-Dollar Opportunity

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Future of Commerce

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# Executive Summary

**Shoppertainment** is a USD1 trillion opportunity in APAC, offering the chance to engage and attract digitally exhausted customers across the region.

- Projected market value of USD1 trillion by 2025
- Increasing from USD500 billion today
- High-growth markets projected to enjoy +63% CAGR

This fast-growing opportunity responds to changing consumer attitudes driven by increasing technology adoption. It appeals to consumers who desire authentic and emotional brand content driven by experiential engagement.

## Definition of Shoppertainment

Shoppertainment is defined as content-driven commerce that seeks to entertain & educate first while integrating content and community to create highly immersive shopping experiences.

Leveraging our innovative, customer-focused demand spaces methodology, BCG has unlocked a unique window into the expanding arena of Shoppertainment. Our research reveals that customers are operating in six key demand spaces across two core groups.

- **Functional demand spaces.** 60% of the e-commerce value ecosystem. Convenience (Easy for me), Improvement (Better for me), Validation (Confirm for me).
- **Emotional demand spaces.** 40% of the e-commerce value ecosystem. Recommendation (Advise me), Indulgence (Spoil me), Inspiration (Inspire me).

Shoppertainment offers the potential for brands to engage consumers within emotional demand spaces by delivering content that ignites excitement, trust, knowledge, and passion. In doing so, brands have a chance to inspire key switching behaviour that engages customers at the “moment of truth”. This triggers a halo effect that radiates out across consumer journeys, allowing brands to transition purchasing behaviour and capture customers in the functional demand spaces.

## APAC’s Shoppertainment growth markets

Six key high-growth markets—Australia, Indonesia, Japan, South Korea, Thailand, and Vietnam—will drive significant value opportunities.

- **Total e-commerce** GMV rising from USD500 billion to USD700 billion 2022-2025
- **Shoppertainment** GMV rising from USD24 billion to USD100 billion 2022-2025

## The opportunity for brands

Brands should seek to engage Shoppertainment and market growth through five emotional touchpoints, adapted to meet the needs and desires of a given market:

- Tell stories and educate
- Focus on video-first
- Don’t force decision-making
- Be authentic
- Recommend the trends

These concerns will be complemented by fundamental needs within the functional demand spaces to provide clear information and ensure a clear path to purchase. Brands can inspire Shoppertainment growth through a four C’s strategy for success.

- **Campaign strategy** with clear planning that smooths pain points while focusing on entertainment
- **Customer segmentation** that identifies the right customers at the right time to inspire switching
- **Channel management** with dedicated resources to unlock opportunities
- **Content playbook** that operates a video-first approach to inspire and inform consumers

Marketing leaders have an immediate and tangible opportunity to capture value in this evolving commerce segment with a carefully curated strategy designed to leverage the inspirational and authentic content that emotionally engages customers in this next wave of commerce.

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- Curating the right Shoppertainment strategy
- "Four C's" of Shoppertainment



**01**

**Market  
Research**

# Shoppertainment is the Future of Commerce and Could Become a Trillion-Dollar Opportunity for Marketers

CONSUMER EXPECTATIONS ARE EVOLVING in the modern commerce landscape. Daniel wakes up each day and checks his phone first thing, seeking messages and notifications, before launching his favorite apps. His daily app choice may depend on his mood, but it's reliably TikTok, YouTube, or Instagram.

Daniel scrolls through posts and images, catching up on news and recommendations. He stops when a video catches his eye but after the first few seconds of branded content, his attention is lost and he scrolls on. Daniel switches to a different app and decides to watch three videos of content creators singing hit songs he enjoys. He scrolls further and finds a video of an influencer reviewing a new pair of sneakers. Daniel likes the sneakers, so he clicks on the affiliated link to explore more pictures on the brand's own mobile website. Still on his mobile device, Daniel opens up a browser window and types the name of the sneaker into a search engine to find out more. He clicks on a shopping advert that appears in the search results, leading him to the product page of a prominent e-commerce platform. Daniel then receives a text message from his friend which distracts him from his journey, and he switches apps to reply, leaving consideration of his sneakers for another day.

## Unpacking the new consumer journey

Daniel's story is one of millions of individuals across Asia today, as digitally engaged consumers spend increasingly large shares of their time online but distracted by the diverse range of digital channels and clamor of brand messages. Boston Consulting Group (BCG) developed its unique demand spaces concept to understand the journey of consumers like Daniel, looking at how today's consumers want to define their own commerce engagement. Through the demand spaces concept, marketers can understand the language and desires of consumers, and recognize how and when to reach out to consumers during a 'moment of truth' that occurs in Emotional demand spaces.

The evolving area of Shoppertainment presents an intriguing pathway to attract consumers like Daniel through a video-first, sound-on format that engages consumers deeply and delivers content that they care about. BCG's analysis projects that Shoppertainment could unlock a USD 1 trillion opportunity for brands in Asia Pacific (APAC),

growing at 63% compound annual growth rate (CAGR) in the most lucrative high-growth markets in coming years, with mainstream marketers today barely skimming the surface of this rapidly emerging market value.

## Connecting with a digital but distracted APAC

APAC is an extremely digitally connected, but distracted region. The average APAC consumer spends 6.7 hours online daily across various digital devices, more than consumers in North America (5 hours) and Europe (3.4 hours). Yet this online experience has now arguably reached a saturation point for advertising, creating challenges for marketers seeking to encourage greater engagement in the face of changing consumer appetites.

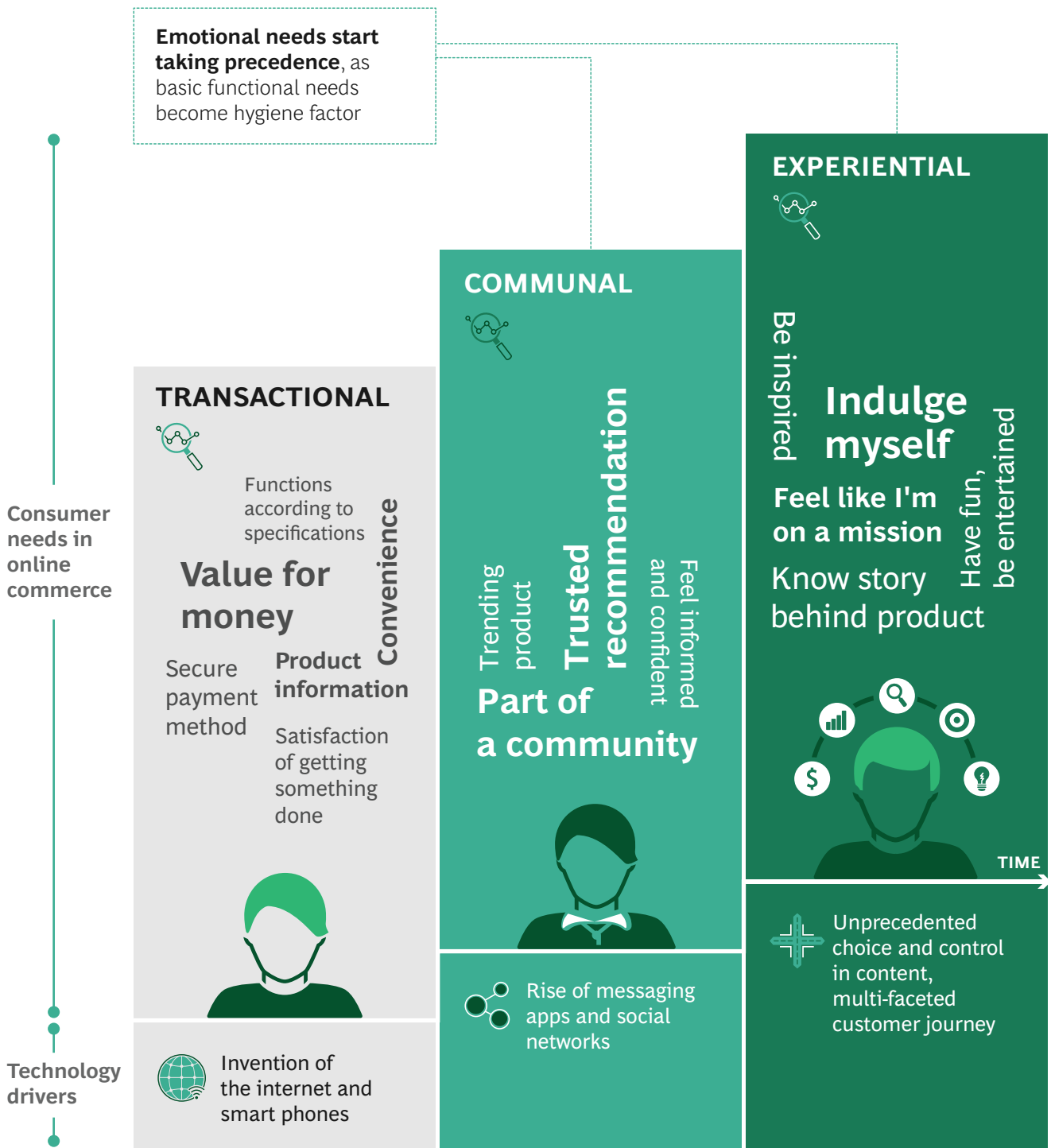
Consumers are now ready and able to steer their own journeys to achieve their e-commerce needs, empowered by expanding technology capabilities and growing online confidence. These tech-empowered consumers have greater choice and control than ever before, triggering a shift away from transactional to experiential engagement and connections with brands [Exhibit 1].



EXHIBIT 1



Consumer needs are shifting towards emotional ones, as technology provides ever more choices and control



Words generated through 'consumer research'

Source: BCG consumer focus group discussions and individual in-depth interviews (n = 112) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan; BCG analysis



This transition is shifting marketing dynamics, as unmet consumer expectations create a disconnect that is transforming the path to purchase [Exhibit 2]. Consumers are suffering from decision inertia with multiple consideration pathways confusing their journey to purchase, and growing skepticism of branded content.

“Sometimes I’ll look at it for a few seconds to find out the brand, then I’ll scroll past,” quoting a Thai consumer from our market research, who embodies the decision inertia behavior.

BCG’s research demonstrates these evolving consumer appetites and how they impact purchasing pathways, with 26% wanting more time to consider, almost half (46%) completing a purchase on a different day, 85% of consumers switching apps when progressing through a purchasing journey, and more than a third (34%) skeptical about branded content.

## EXHIBIT 2



**... and this disconnect is causing brands to lose out on consumers along their path to purchase**

### Pain points in the path to purchase



**Inertia to make decisions**

**26%**

wanting more time to consider

**46%**

Buy on a different day



**Distracted journey with multiple pathways**

**41%**

do not purchase due to missing info

**63%**

need to see content at least 3-4 times

**89%**

research inside and outside the app

**35%**

change their mind after research

**85%**

switch apps while going through journey



**High scepticism of branded content**

**34%**

are sceptical about the branded content, keeping them from purchase<sup>1</sup>

<sup>1</sup>Includes neither agree nor disagree, otherwise 22%; Source: BCG quantitative survey (n=2400) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan; BCG analysis

## Understanding consumer needs with demand spaces

Digital consumers have matured, and can now boast of their own language, definitions, and expectations about how they interact and buy online, creating important new dynamics for marketing leaders. BCG's innovative demand spaces methodology provides a unique window into this world that can help inform a more effective future of marketing outreach.

Demand spaces unlock an understanding of true consumer needs, with a unique approach that relies on deep insights garnered from consumer language itself, avoiding being

trapped by rigid outward-looking brand thinking. It differs from traditional customer segmentation, with its temptation to impose internal expectations of customers, and instead focuses on consumers stating and prioritizing their own needs in detail. Demand spaces analysis incorporates insights from recent purchases driven by consumers, then allows clusters to emerge organically through regression analysis, enabling demand space clustering to imitate consumer language and future intent as purely as possible.

The objective of demand spaces is to shift the perspective from consumer segments to demand segments, genuinely identifying consumer needs and aspirations, creating a more actionable view to drive informed understanding [Exhibit 3].

### EXHIBIT 3A



**We analyzed the consumer needs for each demand space by unpacking their actual last purchases**

### DEMAND SPACES EXPLAINED

#### Involvement level

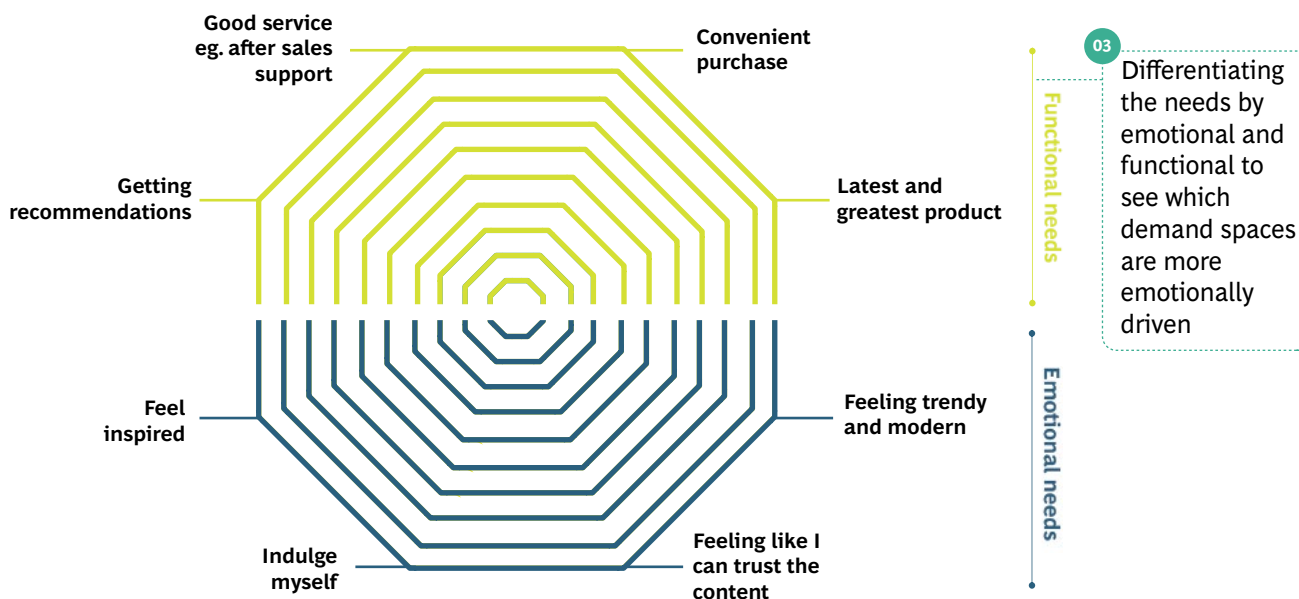
01

We have researched the needs along the different levels of involvement & discovery, using a proprietary quantitative research methodology

#### Discovery level

02

Named the demand space according to needs



## Unpacking the 6 demand spaces



Through in-depth ethnographic insights and quantitative research of the demand spaces methodology, BCG has identified six very different demand spaces across our target markets, with each demand space occupying a unique role in the consumer journey:

- **Convenience (Easy for me)**  
This space is where consumers look to make life easier through their routine purchases, e.g. completing weekly grocery shopping.
- **Improvement (Better for me)**  
This space is where consumers are looking for upgrade opportunities, exploring a better option that is close to a routine purchase, e.g. discover a new and superior detergent at a slightly higher price.
- **Validation (Confirm for me)**  
This space is about consumers confirming they're making the right choice for them, and is especially relevant for products that are of higher involvement, e.g. assessing an upgrade for a mobile handset to the latest model.
- **Recommendation (Advise me)**  
This space is where consumers inform purchasing through a trusted recommendation, often in an area where there's uncertainty about a purchasing decision, e.g. a decision about buying new sneakers where a consumer is looking to follow new trends.

- **Indulgence (Spoil me)**  
This space is about consumers enjoying an opportunity to indulge themselves with a purchase, e.g. coming across a new color release of a favorite lipstick brand.
- **Inspiration (Inspire me)**  
This space is about being inspired to try an exciting new experience, where consumers can discover completely new products or brands, e.g. looking to find a new season fashion look and discovering a new brand that produces fresh and exciting dress styles.

Interestingly for marketers, these six demand spaces can be divided into two main groups, with important implications for future brand engagement efforts:

- **Functional demand spaces**  
Functional spaces are where consumers transact out of habit, focusing on existing products and services without considering new options. Functional demand spaces make up approximately 60% of the entire e-commerce value ecosystem, and consist of Convenience, Improvement, and Validation.
- **Emotional demand spaces**  
Emotional spaces are an exciting arena where change is happening, and consumers are actively considering new products, and making brand switch choices. These are true 'moments of truth' that account for approximately 40% of the e-commerce value ecosystem, and consist of Recommendation, Indulgence, and Inspiration.















EXHIBIT 3B



Our research has identified six very different demand spaces, with each demand space occupying a unique role in the consumer journey

6 demand spaces framework

	Demand space name	Importance of needs	Definition
FUNCTIONAL NEEDS	 <b>CONVENIENCE</b> a.k.a Easy for me		Purchasing routinely with emphasis on convenience, value and reliable delivery
	 <b>IMPROVEMENT</b> a.k.a Better for me		Looking for an upgrade from products that are routinely purchased
	 <b>VALIDATION</b> a.k.a Confirm for me		Choosing the latest and greatest product, to ensure it has the best attributes
EMOTIONAL NEEDS	 <b>RECOMMENDATION</b> a.k.a Advise me		Getting updated on latest products from trusted and curated sources
	 <b>INDULGENCE</b> a.k.a Spoil me		Using a shopping experience or purchase to indulge oneself, while open to choices out there
	 <b>INSPIRATION</b> a.k.a Inspire me		Feeling inspired, trendy and discovering the latest and greatest product

Source: BCG consumer focus group discussions and individual in-depth interviews (n = 112) and BCG quantitative survey (n=2400) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan; BCG analysis

## Consumers travel seamlessly between demand spaces

It's important for marketers to know that consumers switch seamlessly between these demand spaces and learn how to leverage each one with the right solution or strategy at the right time.

BCG's analysis reveals that two out of every three transactions in Emotional spaces are driven by new-to-brand conversions

Consider the example of Gebby, a consumer in Indonesia. While browsing on TikTok, Gebby was inspired by an exciting video on a new lip balm product in the Inspiration demand space. She wanted to look like the girls using the lip balm in the video through the Recommendation space, so decided to buy it. Gebby liked the new lip balm when she used it, and the next time she undertakes her routine purchase on Shopee she decides to purchase the same lip balm again through the Improvement space. Gebby's journey demonstrates how seamlessly an inspiration purchase in an Emotional demand space can become a convenience purchase for the same consumer as part of a smooth purchase pathway [Exhibit 4].

### EXHIBIT 4



## Emotional demand spaces cast an even wider GMV halo since consumers may enter these spaces at 'moments of truth' when changing brands or purchase patterns

### MEET GEBBY

Indonesia

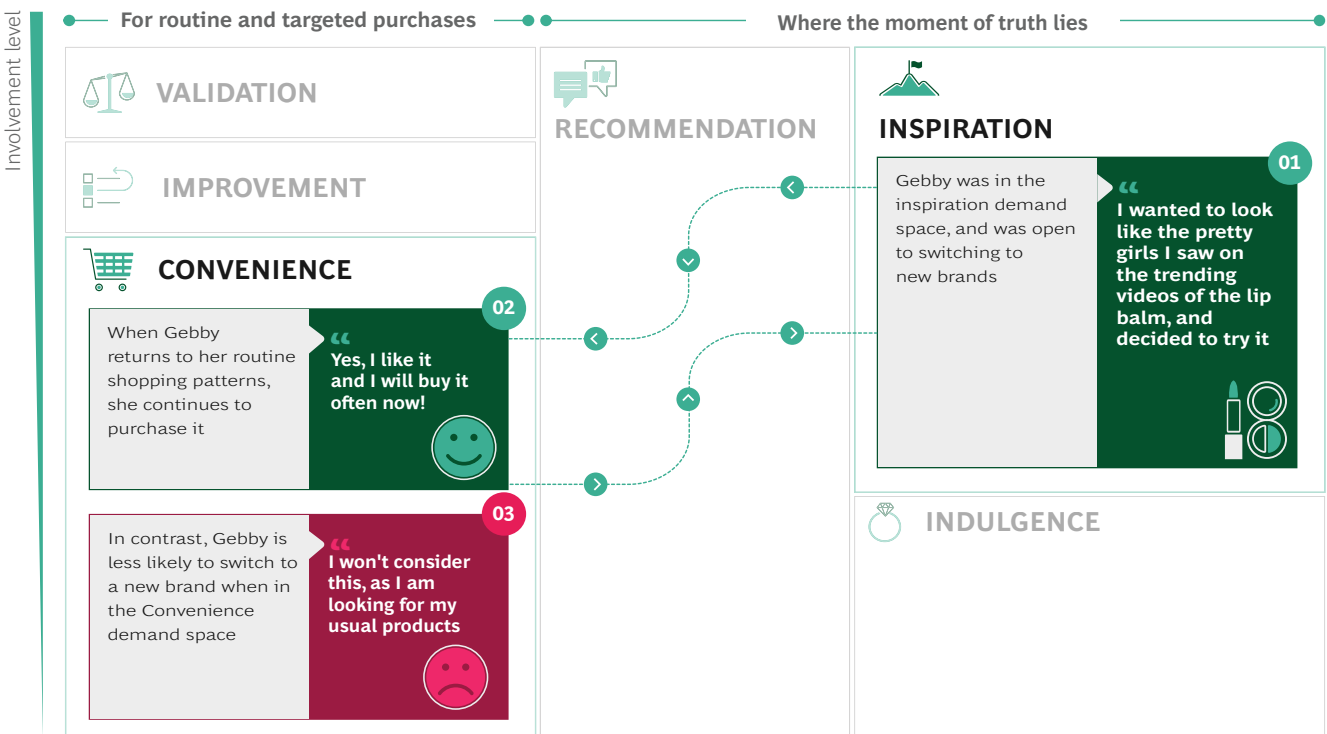
**Age**  
22 years

**Occupation**  
Fresh graduate

Single and lives alone

She loves to keep up with latest trends and enjoys a good deal when shopping

Illustrative example | Adapted from ethnographic research



Appetite to explore

Source: BCG consumer focus group discussions and individual in-depth interviews in Indonesia, Thailand, Vietnam, Australia, Korea, Japan (n = 112); BCG analysis

## Strategic use of Emotional demand spaces

Functional and Emotional demand spaces offer an attractive proposition to marketing leaders, with a gross market value (GMV) of ~USD 500 billion in APAC today. Marketers seeking to effectively target consumers like Gebby need to understand both the when and how of their engagement strategy. They need to learn to grab her attention when she is in the right mindset to be inspired, avoiding targeting that seeks to garner her attention during her routine purchase consideration. The combination of the right timing and right platform counts.

Emotional demand spaces are about more than attaining a given need, they're about connecting to emotions in a way that engages in an entertaining, educational, and joyful way. Consumers are looking for inspiration and adventure, to indulge in exciting new consumer choices, and for trusted recommendations that can help take them on that journey.

What's more exciting is these spaces offer a halo effect, radiating out consumer journeys to other brands and products through a 'moment of truth' model that inspires brand switching and product exploration. When in the Emotional demand space section of her purchase pathway, a consumer such as Gebby is more open to being inspired, being offered new choices, and experimenting with new products. The right message at the right time offers the potential to 'capture' Gebby, inspiring a product change in an Emotional space that leads to customer loyalty through future Functional demand space behavior.

When Gebby is open to explore and be inspired, marketers need to choose the right content to address her needs. These needs are fundamentally different for Emotional spaces, where excitement, trust, knowledge, and passion count. By convincing Gebby in the Emotional demand space, marketers can effectively establish new routine purchase patterns. This means engagement within the Emotional demand space—which accounts for 40% of the

e-commerce ecosystem alone—radiates benefits out to Functional demand space purchasing journeys that make up the larger share of the e-commerce market.

### Shoppertainment ignites excitement, trust, knowledge, and community passion

Existing commerce pathways fail to meet the evolving consumer needs of consumers identified through the demand spaces methodology. Shoppertainment represents a fresh and rapidly expanding opportunity for marketers to bridge this divide, and engage consumers with an approach that reflects shopping driven by entertainment that ignites excitement, trust, knowledge, and community passion [Exhibit 5]. Shoppertainment should leverage storytelling and educational content, with a video-first approach, presenting a credible and authentic voice supported by trusted recommendations.

### CASE STUDY 1

**E-commerce platform Lazada leveraged video-first social media platform TikTok to build brand awareness in Indonesia as the preferred shopping destination during Ramadan. Lazada collaborated with creators on the platform to share authentic stories about products that were meaningful to them, driving followers to the Lazada marketplace. Engagement was further amplified through use of a seven-day discount coupon offer. The campaign resulted in 260 million video views on TikTok, generating a 13X uplift in user-generated content, and resulting in a 100% coupon redemption rate.**

Source: TikTok



## Entertainment-first engagement

This is about entertainment-first engagement, backed by a clear and informed consumer journey, and inspired by key enablers such as influencers, consumers, and brand efforts [Exhibit 6]. This content can be delivered through a variety of content platforms, utilizing trending social media and e-commerce platforms to rapidly amplify authentic brand messages. These outreach efforts can be launched through a variety of content types including video, livestream broadcast, shoppable TV, and shoppable live events, and catalyzed by shared passion, expert advice, and trends that reflect the three Emotional demand spaces.

### CASE STUDY 2

Global cosmetics brand Garnier launched a big-impact TikTok campaign in Vietnam to promote the launch of its new serum skincare product. Garnier collaborated with Gen-Z brand ambassador and celebrity Anee to create a signature music track, with a hashtag challenge to promote wider organic engagement during the 1212 shopping festival, with urgency generated through inspiring pop-up adverts. The campaign resulted in 283 million video views, driving a 30% uplift in sales on Shopee e-commerce platform, and leading to a 6.6% increase in brand recommendations.

Source: TikTok

“I saw some trending pants on TikTok, saw that it is also trending on Facebook with friends reviewing, and I bought it,” quoting a Vietnamese consumer from our qualitative market research.

## SHOPPERTAINMENT

### DEFINITION



Content-driven commerce that seeks to entertain & educate first, while combining content and community to create highly immersive shopping experiences



EXHIBIT 5












**This new form of commerce best taps into consumer needs of Emotional demand spaces**

Consumers want...

**Emotional needs of demand spaces**

This new form of commerce provides...

**Key entertainment attributes**

 <p>FUN AND ENTERTAINMENT</p>	 <p>Storytelling and educational</p>	<b>81%</b>	<p>% of respondents that find attribute important in making content engaging</p>
	 <p>Video-first</p>	<b>76%</b>	
 <p>CREDIBLE AND ORIGINAL</p>	 <p>Authenticity</p>	<b>71%</b>	
 <p>INSPIRATION AND INDULGENCE</p>	 <p>Don't force decision making</p>	<b>71%</b>	
 <p>TREND AND COMMUNITY</p>	 <p>Trusted advice and recommendations</p>	<b>65%</b>	

Source: BCG consumer focus group discussions and individual in-depth interviews (n = 112) and BCG quantitative survey (n=2400) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan; BCG analysis



EXHIBIT 6



The next evolution of commerce that fulfils these new consumer needs is in Shoppertainment

Themes	Key attributes	Key enablers	
ENTERTAINMENT FIRST	<p><b>CONTENT</b></p> <p> <b>Storytelling and educational</b></p> <p> <b>Don't force decision making</b></p> <p> <b>Authentic</b></p>	<p><b>CREATED BY</b></p> <ul style="list-style-type: none"> <li>Influencer</li> <li>Consumer</li> <li>Brand</li> </ul>	
	<p><b>FORMAT</b></p> <p> <b>Video-first</b></p>		<p><b>SHOWN THROUGH</b></p> <ul style="list-style-type: none"> <li>Video</li> <li>Shoppable TV</li> <li>Livestream broadcast</li> <li>Shoppable live events</li> </ul>
	<p><b>COMMUNITY</b></p> <p> <b>Trends and recommendations</b></p>		<p><b>FORMED THROUGH</b></p> <ul style="list-style-type: none"> <li>Shared passion</li> <li>Trends</li> <li>Expert advice</li> </ul>
COMMERCE - SECOND	<p><b>COMMERCE</b></p> <p> <b>Clear information</b></p> <p> <b>Purchase straightaway</b></p>	<p><b>CLICK THROUGH TO</b></p> <ul style="list-style-type: none"> <li>Ecommerce marketplace</li> <li>Brand website</li> <li>Social network</li> <li>Video platform</li> <li>Physical store</li> </ul>	

Key information and ability to purchase to be present throughout journey, to ride on spontaneity in Emotional demand spaces

**What it's not**

Live selling and content in any format that focuses exclusively on selling products or services without entertainment-first attributes

Source: BCG consumer focus group discussions and individual in-depth interviews (n = 112) and BCG quantitative survey (n=2400) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan; BCG analysis



**02**

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**APAC's  
Trillion-Dollar  
Opportunity**

# APAC's Trillion-Dollar Opportunity

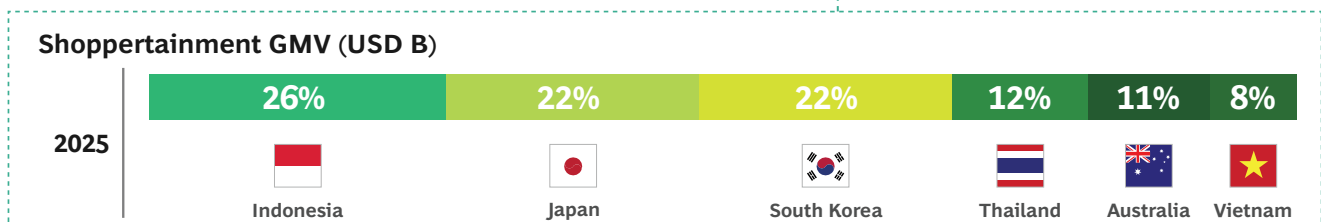
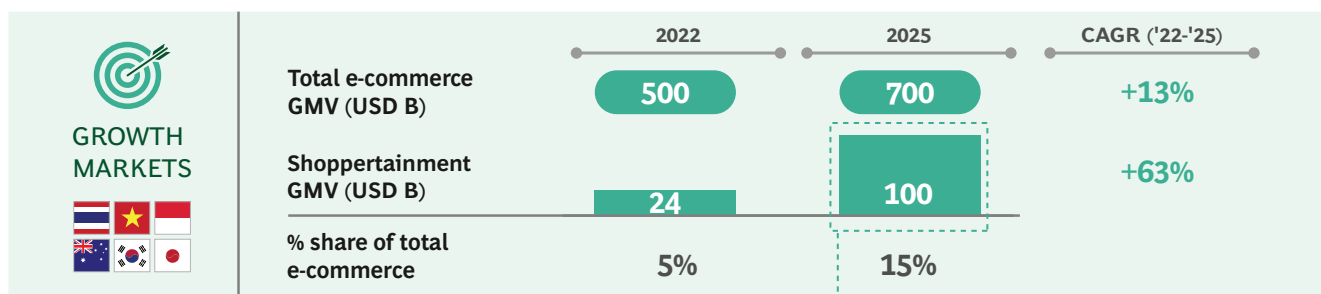
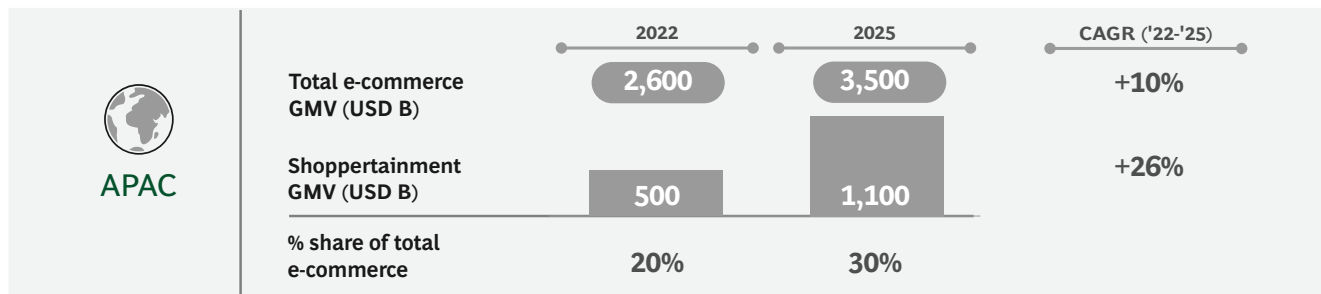
The Shoppertainment opportunity in APAC is projected to expand to a market value of over USD 1 trillion by 2025, doubling from the USD 500 billion value today [Exhibit 7]. Engaging consumers in Emotional demand spaces presents an untapped opportunity to leverage Shoppertainment, inspiring and integrating consumers into purchasing pathways that incorporate the valuable everyday decisions of Functional demand spaces.

Indonesia, Japan, and South Korea will contribute 67% of gross market value (GMV) in Shoppertainment by 2025, reflecting their large and established e-commerce bases. Indonesia, Vietnam, and Thailand add to the mix of some of APAC's most exciting growth markets, and, alongside Australia, will contribute to a remarkable 63% CAGR over the next three years, quadrupling the market value from USD 24 billion to USD 100 billion.

## EXHIBIT 7



**APAC Shoppertainment is already USD 500 Billion today, with an outlook to cross USD 1 Trillion by 2025; key growth markets have 60%+ CAGR**



Source: BCG quantitative survey (n=2400) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan; BCG analysis; Statista; eMarketer

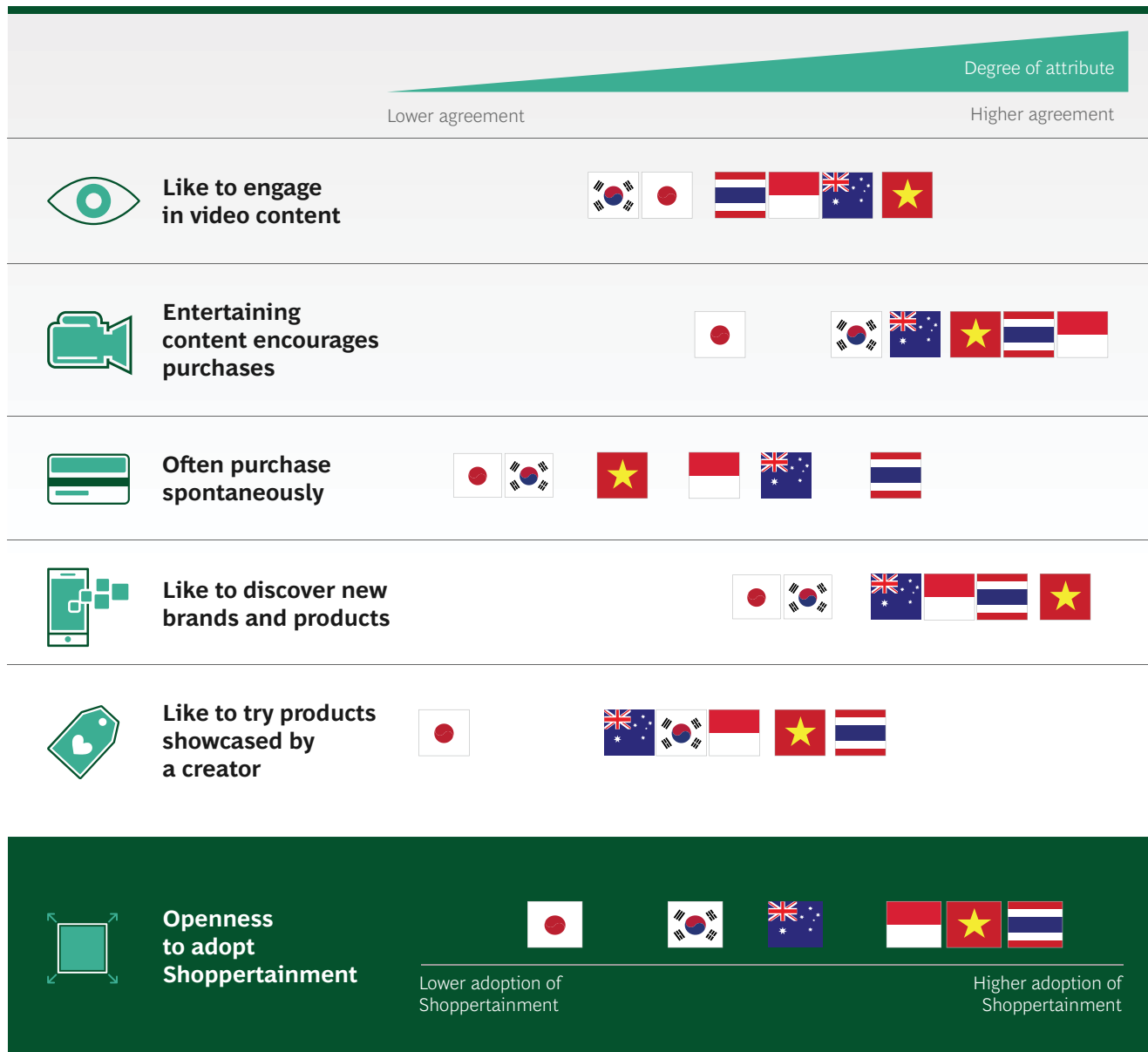
Southeast Asian markets such as Vietnam, Indonesia, and Thailand offer a particularly favorable picture, with Shoppertainment likely to grow more rapidly to represent larger shares of the total e-commerce market.

This entertainment-hungry region enjoys encouraging demand and supply factors, with engaged consumers positioned favorably towards Shoppertainment [Exhibit 8].

## EXHIBIT 8



### Differences in local consumer sentiments will impact Shoppertainment adoption locally



Source: BCG quantitative survey (n=2400) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan; BCG analysis

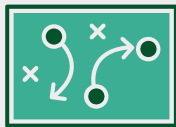
## The need for a tailored market strategy

Much like our appetite for personal entertainment, the specific dynamics of each market will be unique, requiring a differentiated growth strategy for brands [Exhibit 9]. Vietnam and Thailand represent mainstay markets, where marketers should continue efforts to expand while running pilots in other markets. Thai consumers are inspired by the joy of entertainment, with high trust in celebrities and key opinion leaders, and a passion for following community trends.

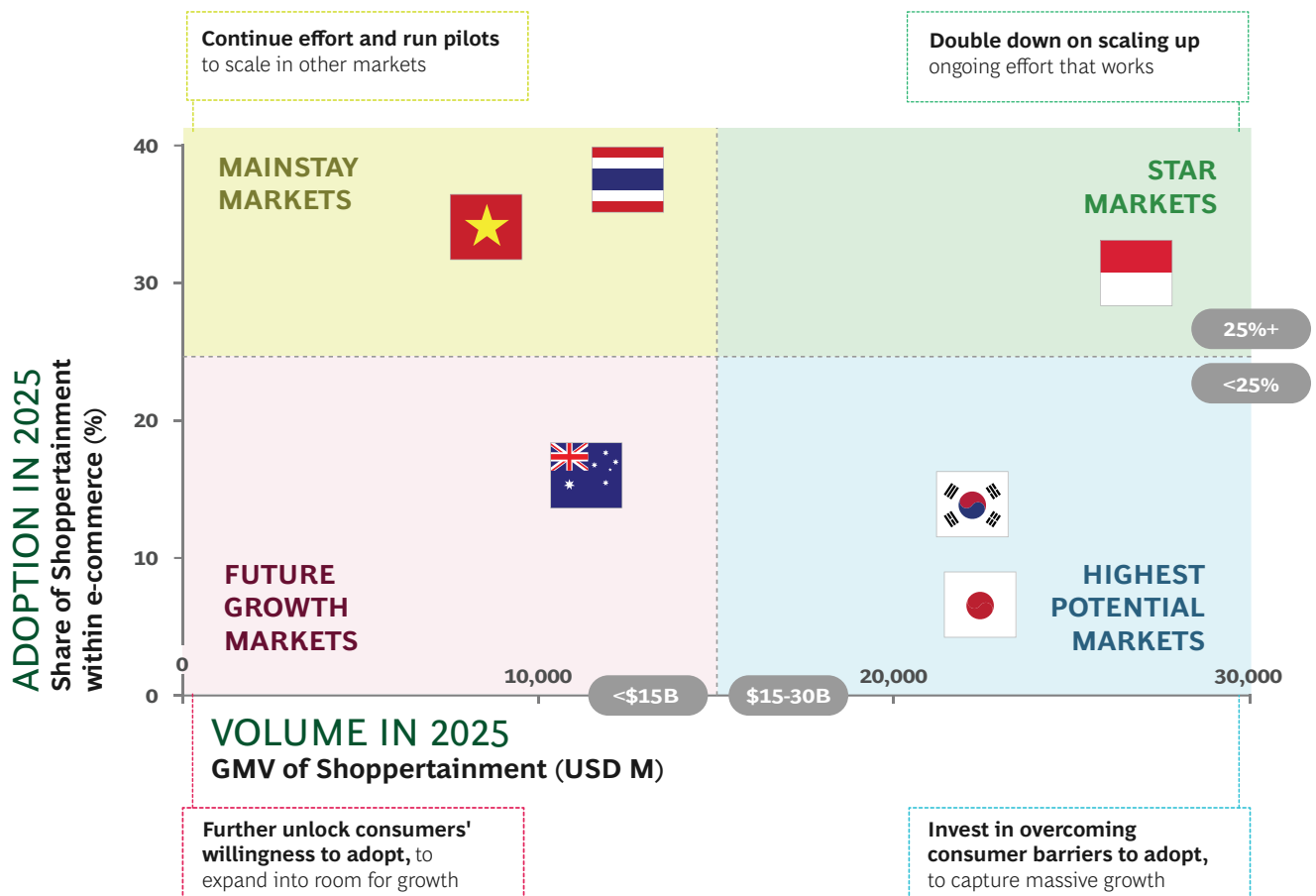
Indonesia offers a significant and growing market, with huge commerce potential, and brands should look to double down while scaling up ongoing efforts in Shoppertainment.

Successful approaches will leverage the Indonesian preference for live format entertainment, with real-time interactions and engaging content. Japan and Korea present high-potential markets where brands should look to invest in overcoming consumer barriers for Shoppertainment adoption, with South Koreans demonstrating a particular appetite for comedy, dance, songs, and entertainment, as well as content which embraces popular celebrity and K-drama culture. Australia hints at a future growth market if efforts are successful to unlock consumer e-commerce adoption to drive growth, which should look to meet consumer desires for refined entertainment that leverages humor.

### EXHIBIT 9



## Markets are expected to vary in GMV and adoption by 2025, with differentiated strategic imperatives for brands



Source: BCG quantitative survey (n=2400) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan; BCG analysis

## Shoppertainment category outlook

Shoppertainment is naturally suited to certain high-desire segments, and as such certain categories are likely to lead the space due to their significant influence on purchasing decisions. Fashion and accessories are categories where creativity and visual entertainment content can drive up appeal. The rise of beauty and personal care products in commerce has historically been propelled by how-to videos and educational content, which naturally fits well with expert personalities and recommendations from trusted communities. Electronic devices is a category where product reviews gain significant traction, with added convenience for trusted recommendations of new and exciting arrivals, in which entertainment-first strategies can be a key differentiator. Food and beverage is an area where inspiration and visual content can also drive consumer decisions. Together, these categories contribute more than half (55%) of the projected total market value from Shoppertainment [Exhibit 10].




### EXHIBIT 10

#### Certain categories are already large in Shoppertainment

Commerce across 6 markets, while others have upside

##### Category

	<b>Fashion and accessories</b>	<b>18%</b>
	<b>Beauty and personal care</b>	<b>14%</b>
	<b>Food and beverages (incl. groceries)</b>	<b>13%</b>
	<b>Electronic devices</b>	<b>10%</b>
	<b>Household items</b>	<b>7%</b>
	<b>Digital products and online gaming</b>	<b>5%</b>
	<b>House appliances</b>	<b>5%</b>
	<b>Mother &amp; child</b>	<b>5%</b>
	<b>Sports items</b>	<b>5%</b>
	<b>Home furnishing / décor</b>	<b>5%</b>
	<b>Streaming services</b>	<b>4%</b>
	<b>Travel</b>	<b>3%</b>
	<b>Financial services</b>	<b>3%</b>
	<b>Automotive</b>	<b>1%</b>
<b>Total</b>		<b>100%</b>

Source: BCG quantitative survey (n=2400) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan; BCG analysis

## Curating the right Shoppertainment strategy

Consumers are craving the right entertainment to reignite their purchasing passions, and marketers who act first can enjoy a valuable opportunity to leapfrog the competition. Those who engage the right Shoppertainment experiences at the right time have the potential to genuinely engage the consumer, inspiring key brand switching behavior, and capture their future purchasing journeys [Exhibit 11].

- **Tell stories and educate.**  
Build content with genuine storytelling and educational value, telling a story about your brand or product, educating potential consumers in an intriguing and interesting way, and weaving in comedy to entertain and engage.
- **Focus on video-first.**  
Embrace a video-first approach defined by short content that maintains attention, and leverage influencers or established platform players to amplify your message.
- **Don't force decision-making.**  
Ensure your content is associated with interests and hobbies that align with your consumer, and don't seek to force decision making. Target good feelings and nostalgic recollections that rekindle excitement, while building stories around uplifting and engaging themes.

- **Be authentic.**  
Create an authentic brand sentiment, with credible reviews and open and engaging community conversations, and lead with authentic videos that inspire within a community.
- **Recommend the trends.**  
Include the voices of credible and trusted community experts, and facilitate extended conversations between friends and users. Build this into a strong and trusted culture and following.

These Emotional concerns will be complemented by fundamental purchasing pathway needs, and these too should be facilitated in your inspiring consumer journey.


















- **Provide clear information.**  
Ensure key product information is easily accessed and clearly communicated.
- **Ensure clear path to purchase.**  
Provide a clear and intuitive path to purchase, making a simple action from awareness, desire, to conversion, including product links in videos or voucher display cards.



EXHIBIT 11



**Brands can leap ahead in Shoppertainment by taking actions to meet the emotional needs of consumers**

<b>Storytelling and educational</b>	 <b>18%</b> Tell a story around your brand or product	 <b>17%</b> Add elements that create sense of learning	 <b>16%</b> Use comedy to entertain and engage
<b>Video-first</b>	 <b>38%</b> Create short content to not lose attention	 <b>15%</b> Engage celebrities, KOLs or influencers	 <b>14%</b> Include nice music or sound to content
<b>Don't force decision-making</b>	 <b>38%</b> Associate content with interests and hobbies	 <b>16%</b> Use stories that bring back good, nostalgic times	 <b>15%</b> Build stories upon inspiring, uplifting themes
<b>Authenticity</b>	 <b>47%</b> Ensure sufficient credible reviews	 <b>12%</b> Facilitate community and conversations	 <b>11%</b> Create videos that are not overly edited
<b>Trends and recommendations</b>	 <b>30%</b> Include voices from credible experts into the community	 <b>15%</b> Facilitate organic conversations among users and friends	 <b>12%</b> Develop a strong culture and following
<b>Clear information</b>	 Ensure key product information is easily consumable throughout journey (e.g. product code as printed text on the video)		
<b>Purchase straightway</b>	 Ensure consumers can purchase straightaway at any point in the journey (e.g. product links in videos, voucher display card on video, collection ads)		

**XX%** % of respondents that ranked action as most important out of a list of 7 factors

Source: BCG consumer focus group discussions and individual in-depth interviews (n = 112) and BCG quantitative survey (n=2400) in Indonesia, Thailand, Vietnam, Australia, Korea, Japan



## “Four C’s” of Shoppertainment

Consumer needs are evolving, and Emotional demand spaces provide an opportunity to leverage this change to capture new audiences and enhance customer engagement. This hunt for more aspirational and experiential connections presents a ripe opportunity for brands, reigniting engagement with consumers through an entertainment-first, and commerce-second strategy [Exhibit 12].

Emotional demand spaces will represent 40% of e-commerce GMV in APAC by 2025, while offering an intriguing path to brand conversions through aspirational content which sees two out of every three transactions driven by new-to-brand conversions.

APAC is already enjoying massive growth in Shoppertainment, projected to expand to a market value of USD 1 trillion by 2025. Marketing leaders have a real opportunity to capture their own value in this evolving commerce segment by curating the right entertainment approach. Tapping into Emotional demand spaces while catering for the unique needs of your audience, your industry, and your market not only presents the opportunity to persuade new customers to switch to your brand, but provides the route to capture future purchasing pathways within valuable Functional demand spaces.

- **Campaign strategy** with clear planning that smooths pain points while focusing on entertainment as a priority.
- **Customer segmentation** that identifies the right customers at the right time to inspire switching behavior in Emotional demand spaces.
- **Channel management** with dedicated resources to leverage the significant commercial opportunity of Shoppertainment.
- **Content playbook** that operates a video-first approach to inspire and inform consumers and capture purchasing decisions.

Marketing leaders should look to the lucrative sweet spot which aligns brand aspiration with consumer inspiration, driving commerce growth through the entertainment-first, and commerce-second approach, and inspiring lasting impressions in consumers that respect and reflect evolving expectations and appetites in APAC. This is about embracing the chance to bridge a divide between consumer expectation and engagement, and in doing so carve out a lucrative share of a trillion-dollar Shoppertainment opportunity.





## So, What? CMOs must act now to seize the Shoppertainment opportunity and breakthrough consumer needs



### Consumer needs are evolving, and Emotional demand spaces provide an opportunity to leverage this change to capture new audiences and enhance customer engagement

This hunt for more aspirational and experiential connections presents a ripe opportunity for brands, reigniting engagement with consumers through an entertainment-first, and commerce-second strategy.

#### RECOMMENDATIONS

##### Campaign strategy

with clear planning that smooths pain points while focusing on entertainment as a priority.



### Emotional demand spaces represent 40% of the e-commerce value ecosystem today

while offering an intriguing path to brand conversions through aspirational content which sees two out of every three transactions driven by new-to-brand conversions.

#### RECOMMENDATIONS

##### Customer segmentation

that identifies the right customers at the right time to inspire switching behavior in Emotional demand spaces.



### APAC is already enjoying massive growth in Shoppertainment, projected to expand to a market value of USD 1 trillion by 2025

Marketing leaders have a real opportunity to capture their own value in this evolving commerce segment by curating the right entertainment approach. Tapping into Emotional demand spaces while catering for the unique needs of your audience, your industry, and your market not only presents the opportunity to persuade new customers to switch to your brand, but provides the route to capture future purchasing pathways within valuable Functional demand spaces.

#### RECOMMENDATIONS

##### Channel Management

with dedicated resources to leverage the significant commercial opportunity of Shoppertainment.

##### Content playbook

that operates a video-first approach to inspire and inform consumers and capture purchasing decisions.

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