

Where Click Meets Brick: APAC's Omnichannel Revolution

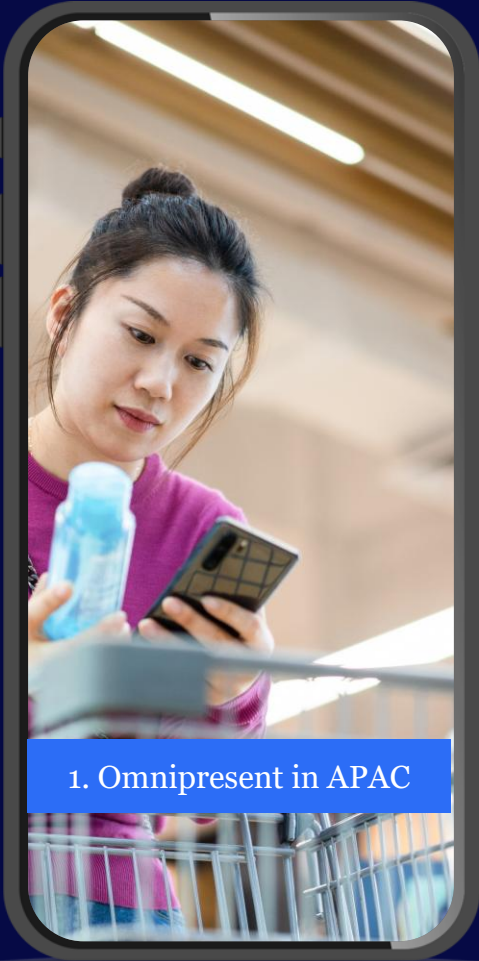
Josh Morgan, Jessica Lim, Kanaka Bhagwat & Ben Wang
NielsenIQ APAC and China e-commerce

19th June 2025

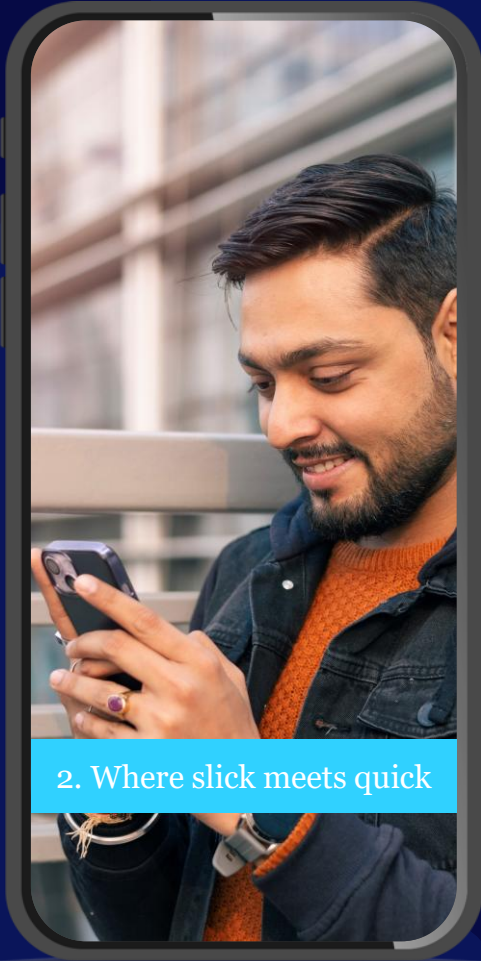
NielsenIQ



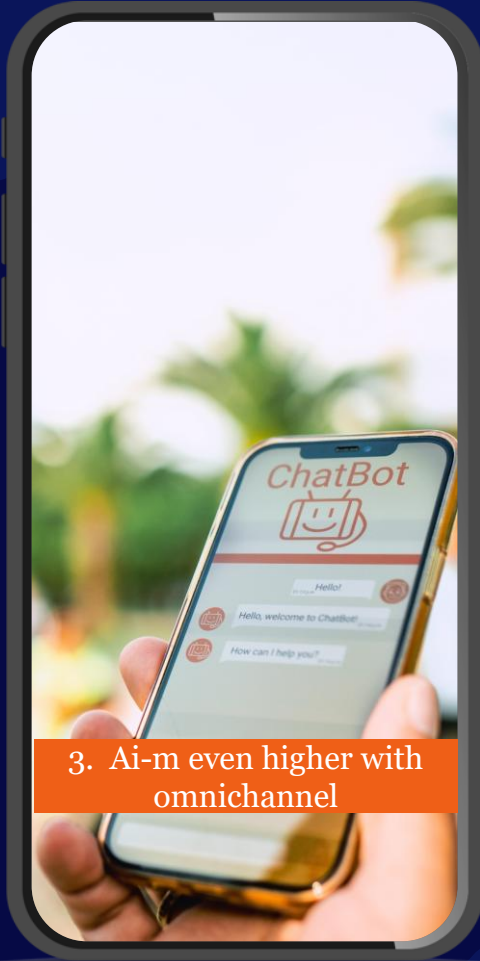
Today's Agenda and presenters



1. Omnipresent in APAC



2. Where slick meets quick



3. Ai-m even higher with omnichannel



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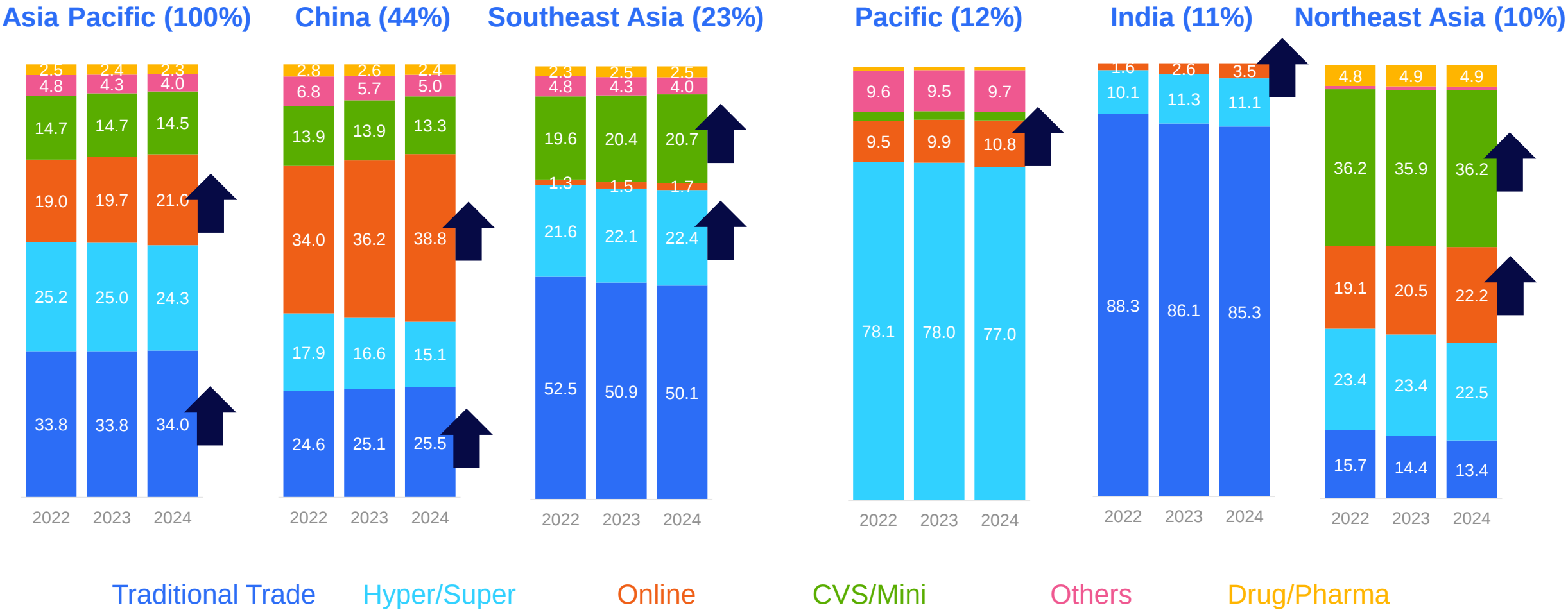
*Omni*present in APAC

The State of e-commerce in Asia Pacific



Strategize for an omnichannel region as shoppers look for convenience and value for money

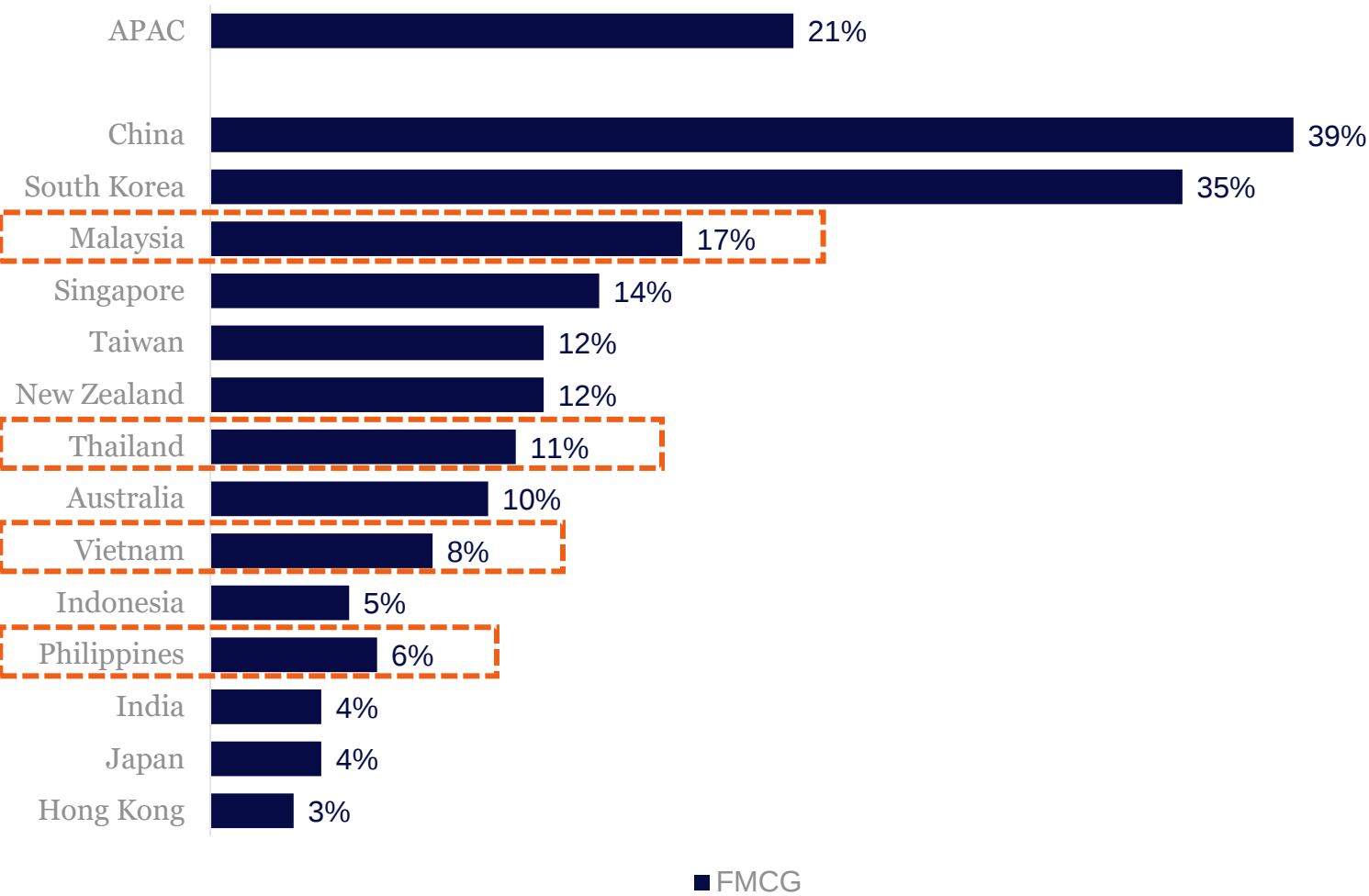
FMCG Channel Value Share of Trade %



Source: NIQ Data to December 2024

Drive FMCG e-commerce to Tech & Durables' level

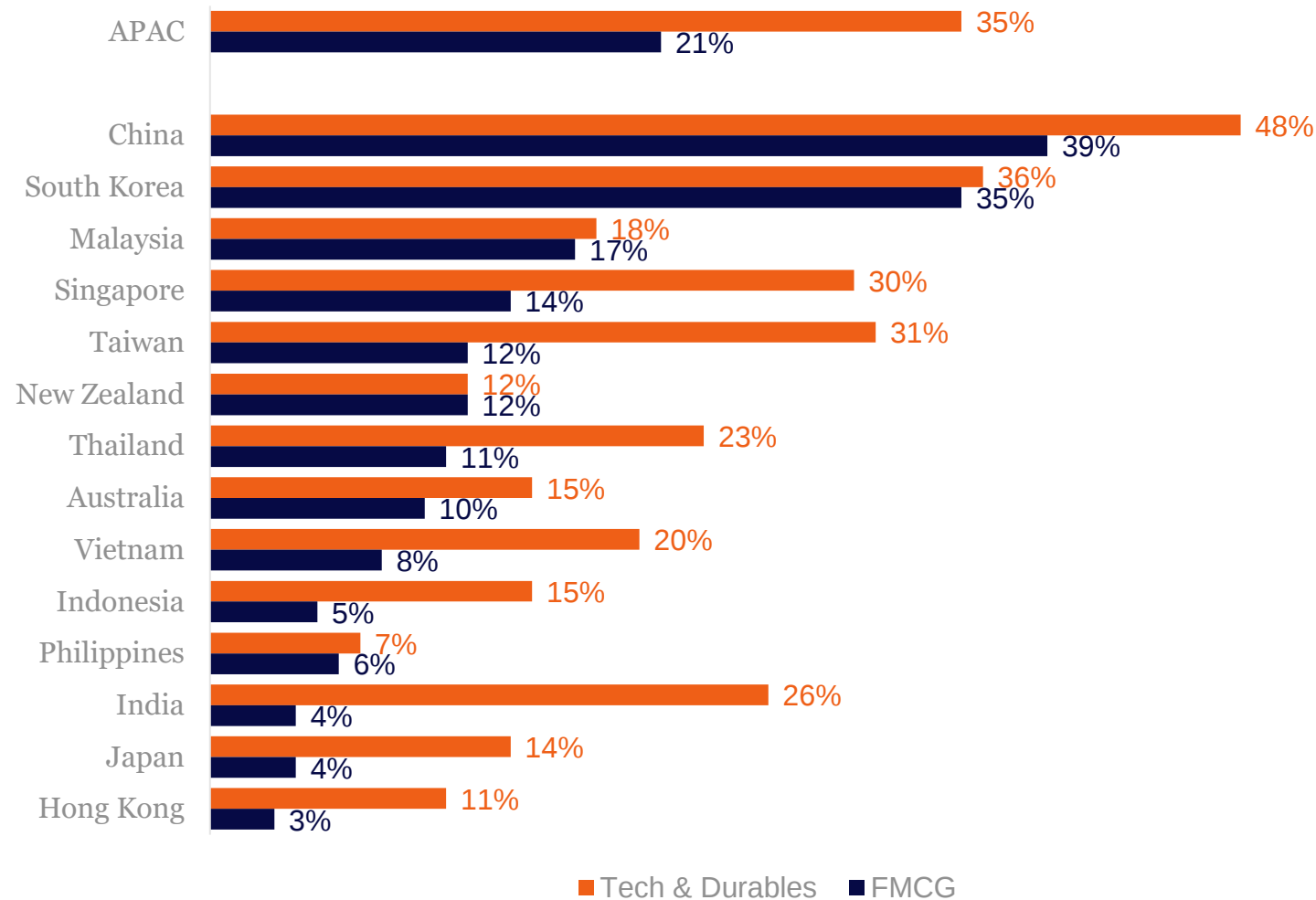
E-commerce value share of trade in Asia Pacific



Source: NIQ, GFK 2025 data, EMarketer 2025, Forrester, Statista, Metric, Meti 2023 & 2024 data

Drive FMCG e-commerce to Tech & Durables' level

E-commerce value share of trade in Asia Pacific



Source: NIQ, GFK 2025 data, EMarketer 2025, Forrester, Statista, Metric, Meti 2023 & 2024 data

Top concerns in Asia Pacific

1. Increasing food prices **46%**
2. Economic downturn/Recession **31%**
3. Increasing utility bills **27%**

Source: NielsenIQ APAC Omnichannel survey June 2025

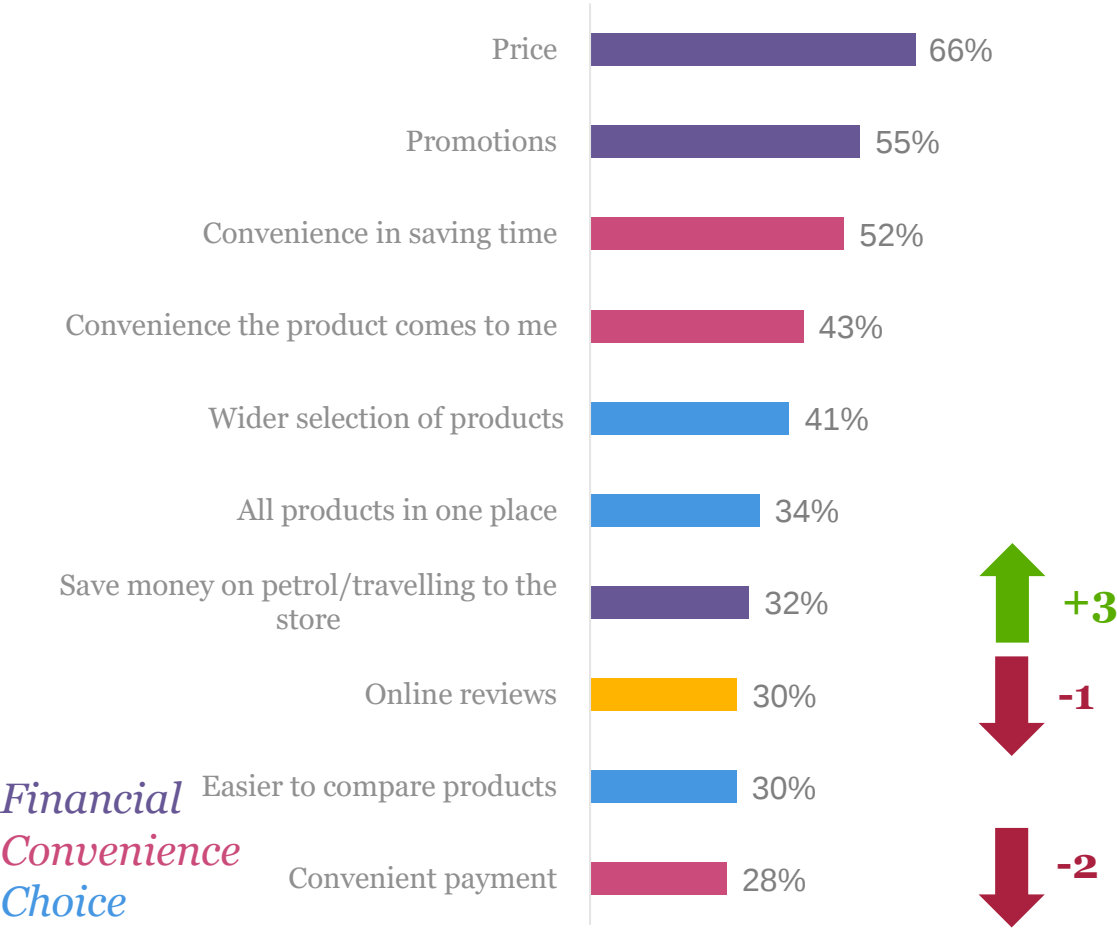
Top factors where to shop

1. Value for money **65%**
2. Low prices **57%**
3. Fresh products **54%**

Price and Promotions are the key drivers

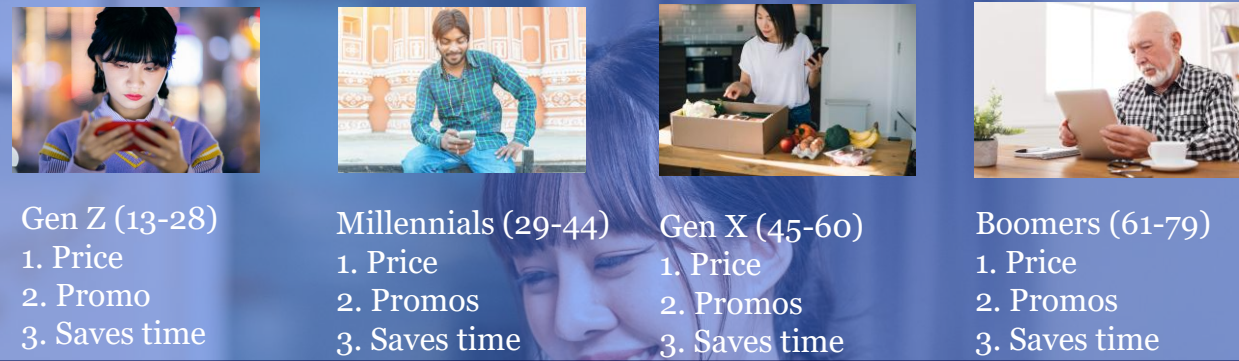
Convenience both in time and effort also appeal widely

What makes APAC shoppers buy online?



Source: NielsenIQ APAC Omnichannel survey June 2025

Generations

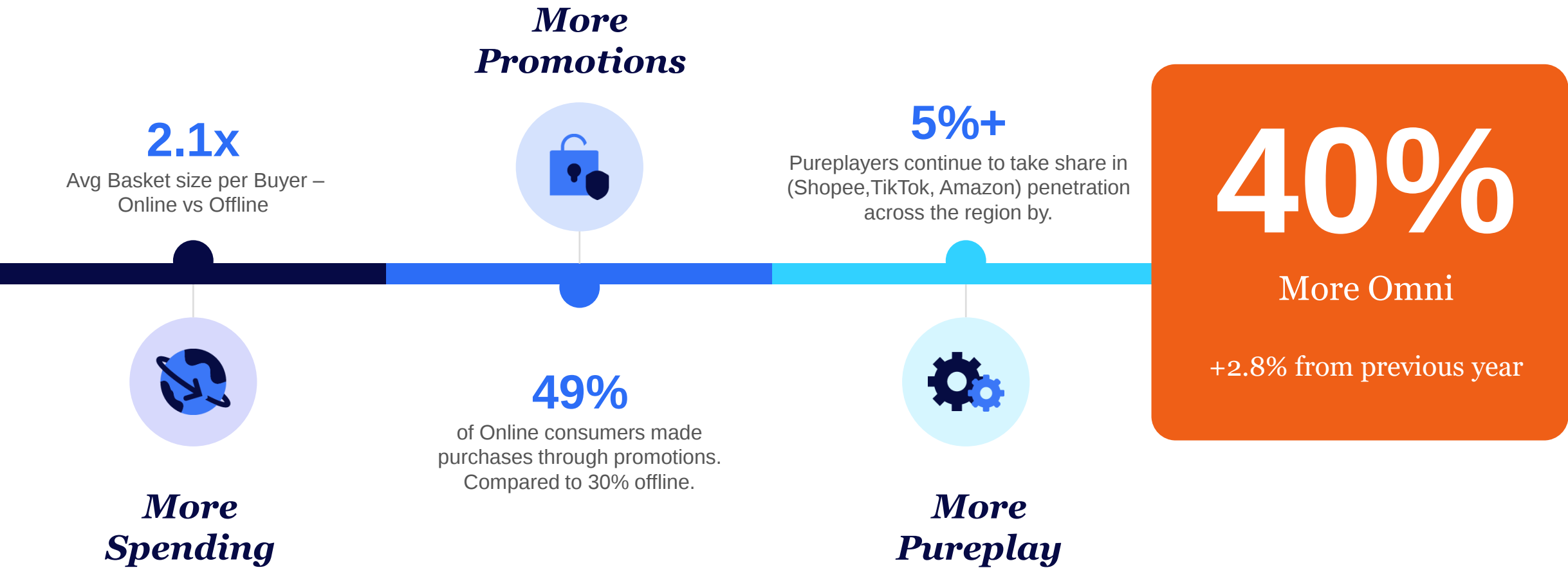


Markets



The E-commerce Shopping Trip...

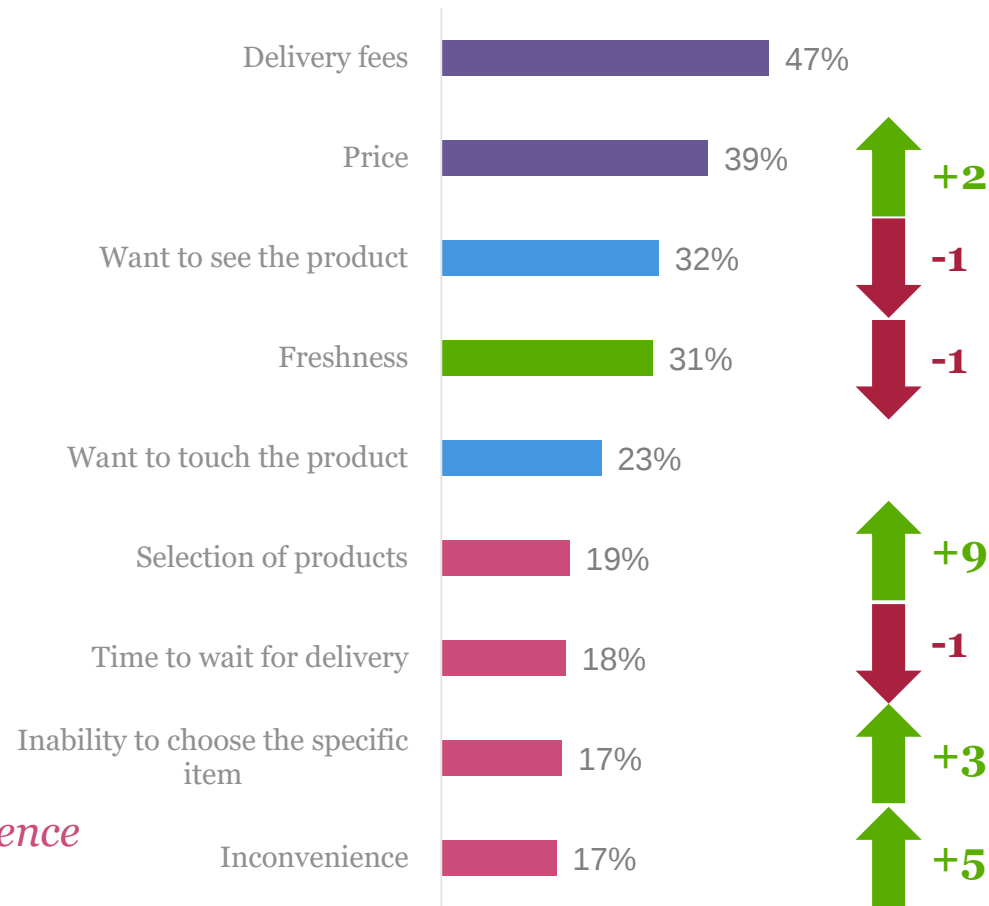
Bigger Baskets, Promotion-Driven - and the Omni Shopper Is on the Rise



Source: NielsenIQ APAC Consumer Panel Tracking, March 2025 — covering Australia, New Zealand, Indonesia, Singapore, Thailand, the Philippines, and Hong Kong

Money is also the motivator to deter
Nonetheless most of the barriers are reducing year on year

What deters APAC shoppers from shopping online?



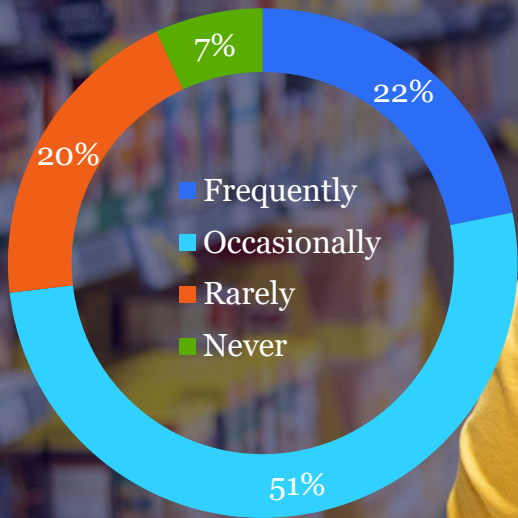
Source: NielsenIQ APAC Omnichannel survey June 2025



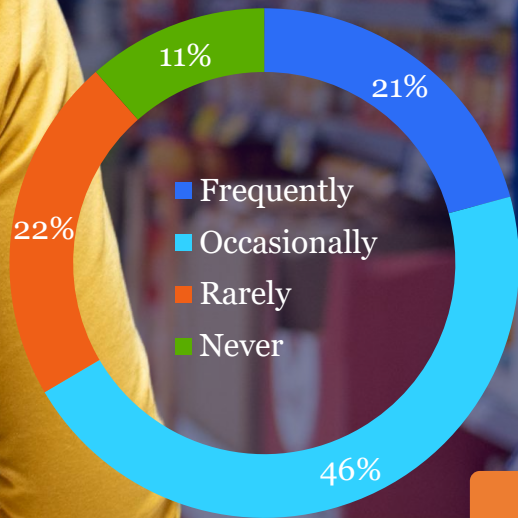
APAC shoppers are researching in one channel but buying in another



*In the last 6 months, have you ever researched a product **online** and then bought it **in-store**?*



*In the last 6 months, have you ever researched a product **in-store** and then bought it **online**?*



Source: NielsenIQ APAC Omnichannel survey June 2025

*52% of Consumers discover products through **Social Media***

Different industries require different online strategies

Where do APAC Consumers buy online?



Personal Care:

1. Online marketplace
2. Online Hyper/Super
3. Social commerce



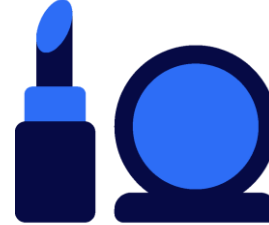
Baby Care:

1. Social commerce
2. Branded stores on marketplace
3. Online Hyper/Super



Pet Care:

1. Online marketplace
2. Online Hyper/Super
3. Social commerce



Beauty & Cosmetics:

1. Online marketplace
2. Directly from brand website
3. Social commerce



Snacks & Confectionery:

1. Online Hyper/Super
2. Online marketplace
3. Social commerce



Alcohol:

1. Online marketplace
2. Online Hyper/Super
3. Branded stores on marketplace



Beverages:

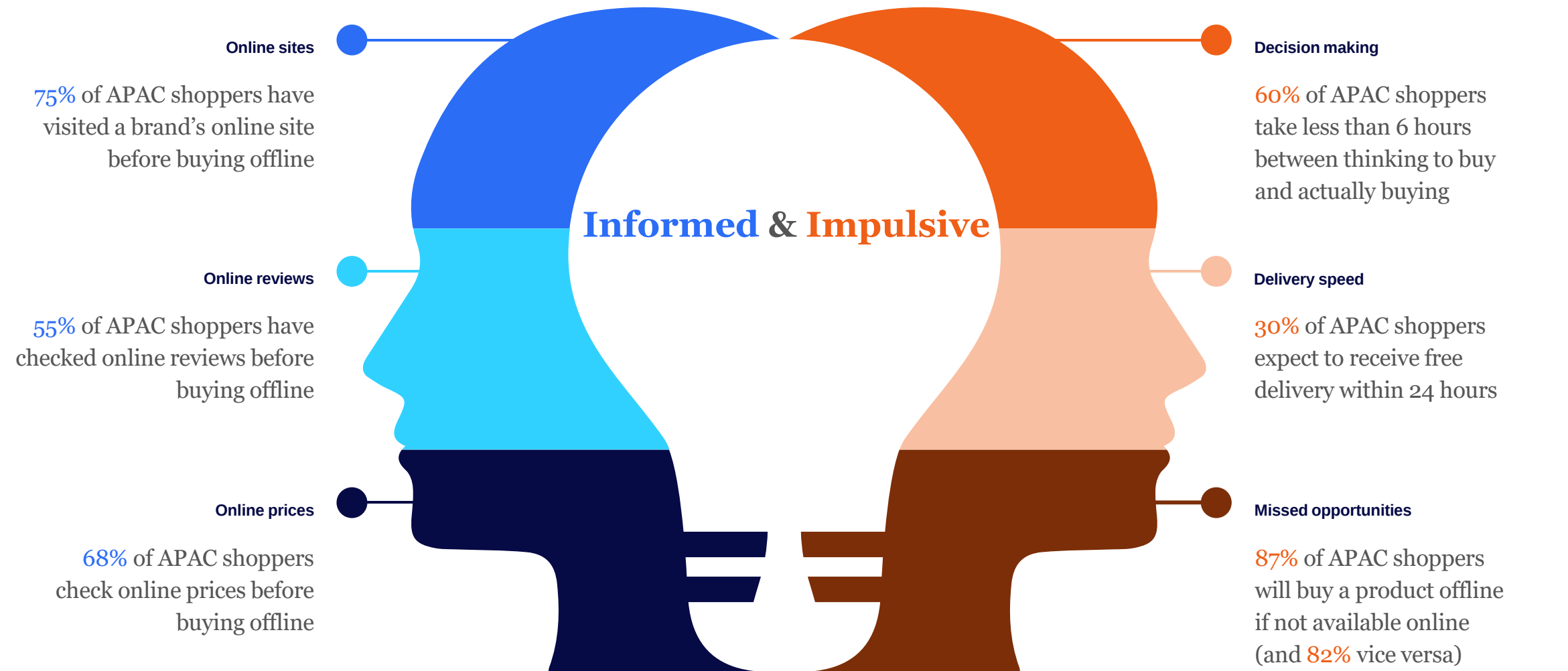
1. Online Hyper/Super
2. Online marketplace
3. Social commerce



OTC & Health Supplements:

1. Online marketplace
2. Directly from brand website
3. Social commerce

APAC omnishoppers are informed and impulsive



Source: NielsenIQ APAC Omnichannel survey June 2025

Where *slick* meets *quick*

The future of omnichannel in APAC

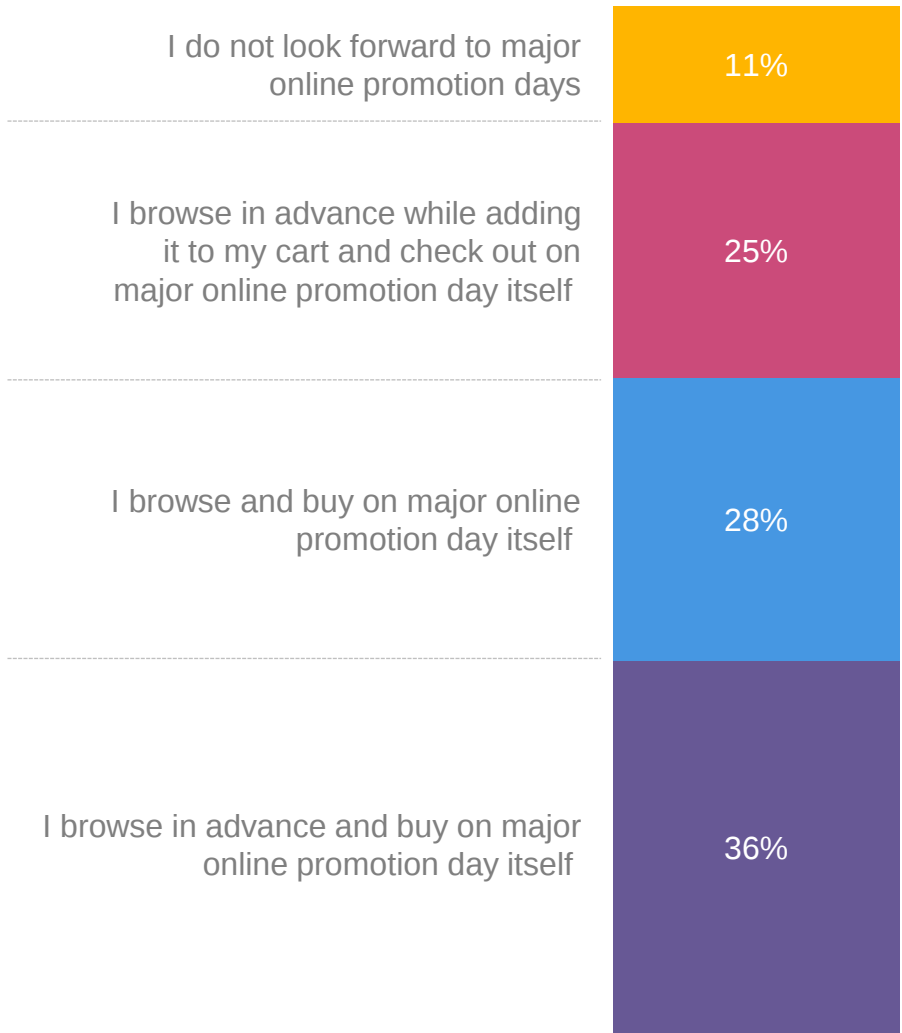


Double-digit day campaigns showing signs of recovery following declines in 2023



	Online Val% Chg. vs. YA		
	2023 vs 2022 Chg.	2024 vs 2023 Chg.	2025 vs 2024 Chg.
1.1	-33.0%	-14.1%	-2.7%
2.2	-11.4%	-11.9%	+9.9%
3.3	16.9%	-73.2%	+12.2%
4.4	-16.1%	-22.8%	-8.3%
5.5	2.9%	-6.4%	
6.6	-67.8%	14.9%	
7.7	62.4%	-38.1%	
8.8	-33.5%	6.4%	
9.9	-5.2%	-3.6%	
10.10	-64.6%	9.7%	
11.11	-20.1%	65.7%	
12.12	-94.5%	+5.6%	

Informed and impulsive APAC shoppers lead to varying promotion day dynamics



39% of APAC shoppers believe that impulse purchases on promotion days lead to regret

38% of APAC shoppers think online promotional day prices are inflated beforehand and therefore not truly significant discounts

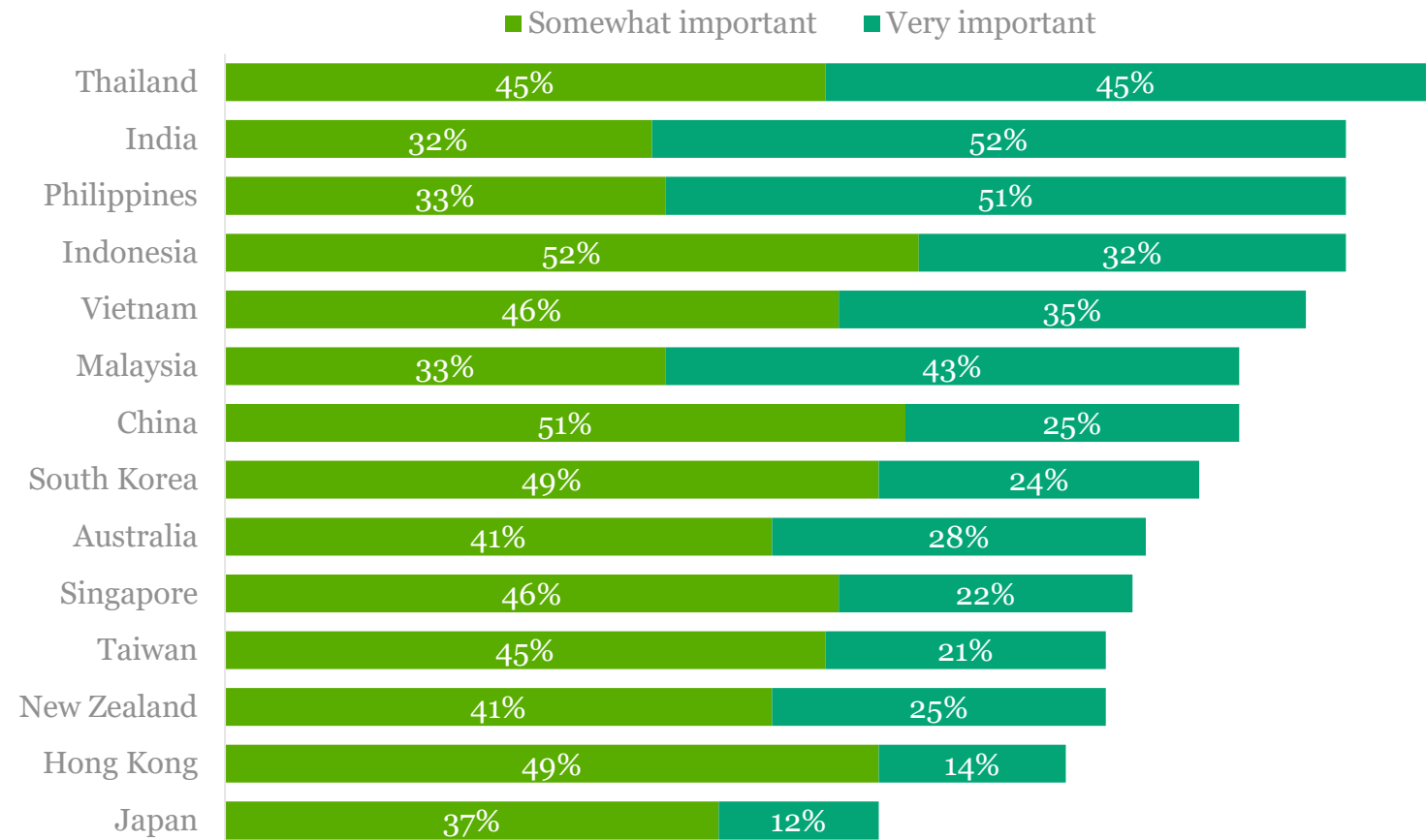


Source: NielsenIQ APAC Omnichannel survey June 2025

APAC Consumers are looking for a seamless omnichannel experience

73% of APAC consumers find a seamless online and offline experience important

How important is it for you to have a seamless experience across online and offline channels?



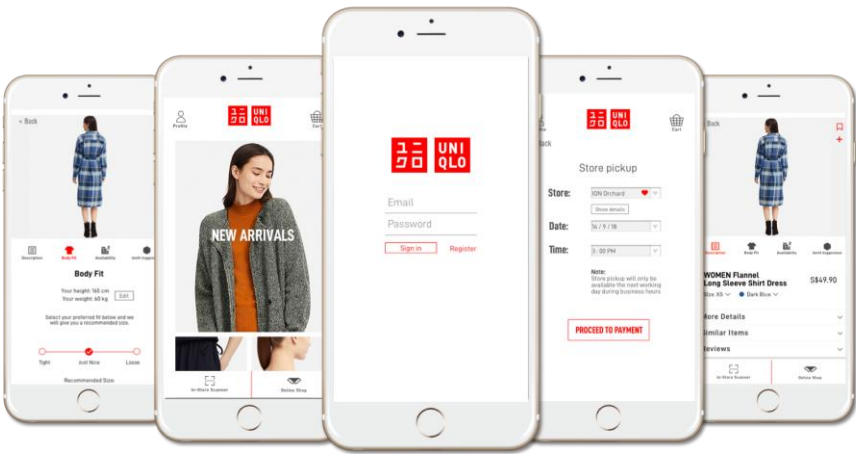
Source: NielsenIQ APAC Omnichannel survey June 2025

There is further opportunity to drive omnichannel



Which of the following omnichannel services have you used?

	Have used
Buy online, pick up in store	54%
Mobile apps for in store navigation or offers	48%
Reserve online, pay in store	44%
Return online purchases in store	41%
In store kiosks to browse online inventory	35%



60% of APAC Millennials buy online & pick up in store

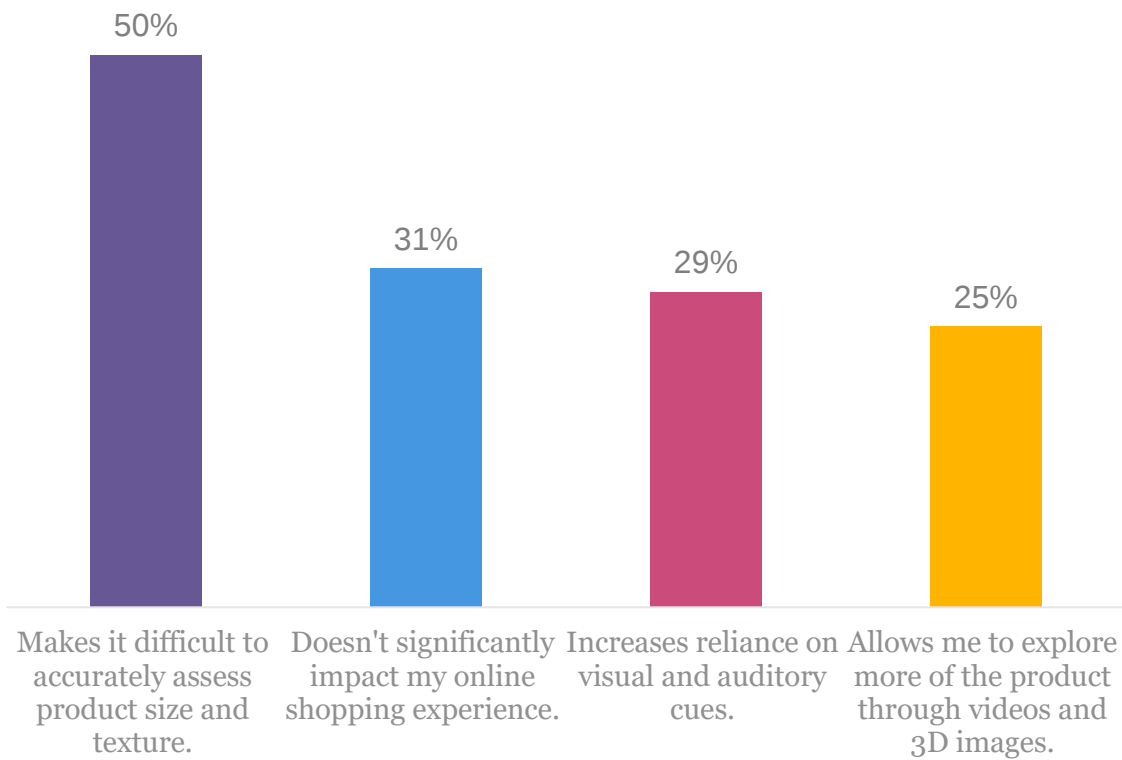
57% of APAC Gen Z use mobile apps for in store navigation or offers



Source: NielsenIQ APAC Omnichannel survey June 2025 | Uniqlo debuts small-format 'touchpoint' concept store in Singapore - Inside Retail Asia

Convenience will evolve with experience

How does the absence of physical interaction (touch, taste, smell) impact your online shopping experience?



Source: NielsenIQ APAC Omnichannel survey June 2025 | Japanese convenience store chain FamilyMart appoints new creative director – streetwear icon, Nigo - CNA Lifestyle



Convenience will also come through seamless payment experience

How do you usually pay online?



Credit/Debit card

51%



Branded payment (e.g. Apple Pay)

40%



Cash on Delivery

34%



On-line banking

32%



Buy now, pay later

16%

Branded payment (e.g. Apple Pay)

57%



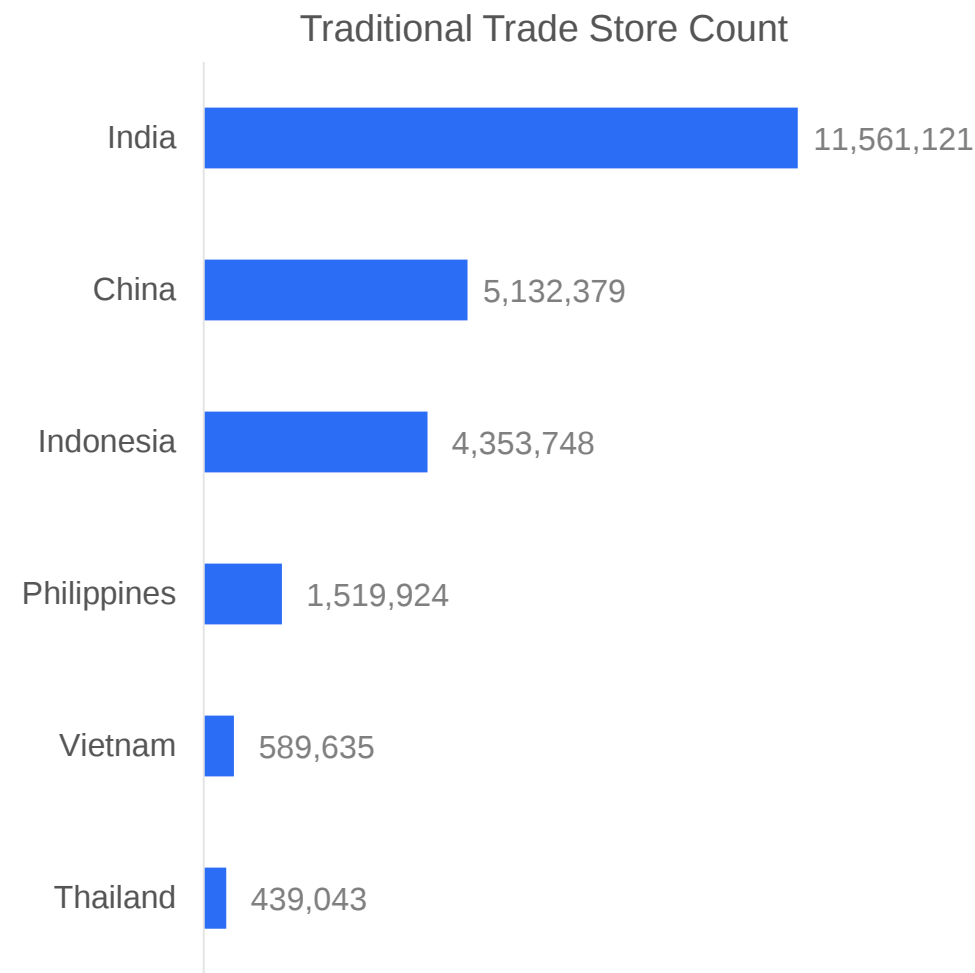
Buy now, pay later

23%



Source: NielsenIQ APAC Omnichannel survey June 2025

It's not just online that is moving to more convenient payment and digitalisation



Jumbotail



LoveLocal



Mitra Bukalapak app

- Electronic book-keeping
- Direct source of goods from brands
 - Door to door delivery
- Digital financial services



Sari-Sari Store Advancement Program

- Financing and education

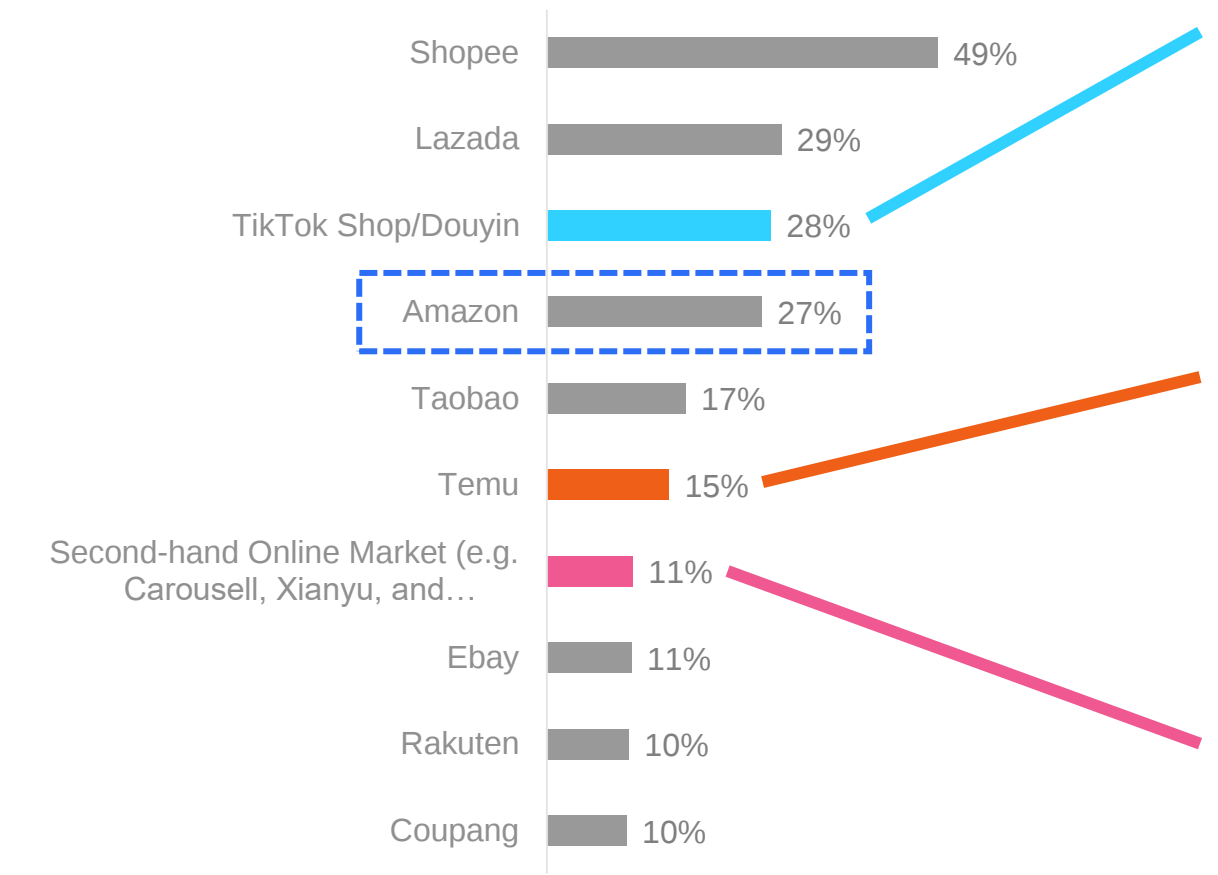
Startups like Growsari and Peddlr

- Direct brand access
- Digital financial services



APAC shoppers are looking for creative means to find good deals and value for money

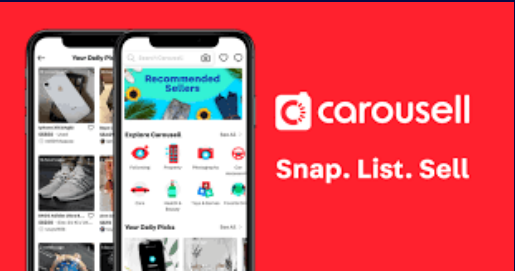
Which of these e-tailers have APAC shoppers bought from in the last 6 months



APAC Gen Z : 41%
Malaysia Gen Z: 71%
Philippines Gen Z: 70%
Vietnam Gen Z: 67%



APAC Boomers : 31%
New Zealand Boomers: 67%
Australia Boomers: 49%
Philippines Boomers: 38%



APAC Gen Z : 15%
Hong Kong Gen Z: 45%
New Zealand Gen Z: 31%
South Korea Gen Z: 31%

Source: NielsenIQ APAC Omnichannel survey June 2025

The omnichannel landscape is evolving fast in 2025



China



Taobao flash



Meituan Shangou



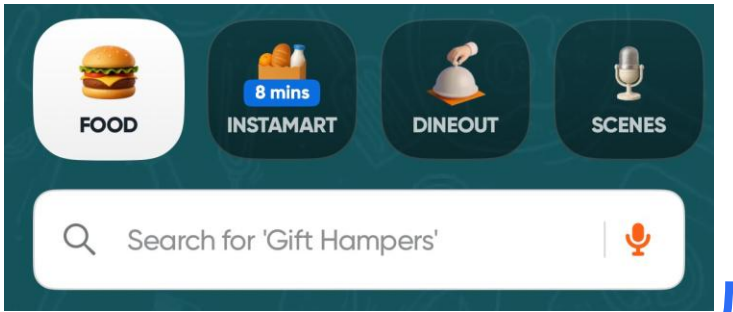
JD Miao Song



Instant retail
picking up speed



India



Food Delivery
+ Grocery Delivery
+ Dine out
+ Gifting



South Korea



SHINSEGAE



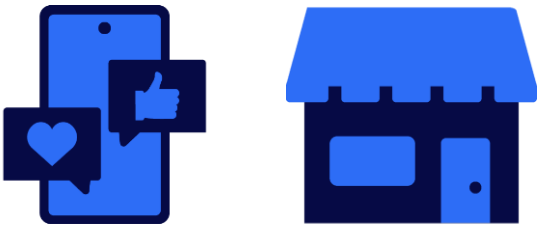
Looking for new
markets for growth

Source: Alibaba ramps up delivery battle with launch of Taobao Flash - Inside Retail Asia | Is 'China's Coupang' coming to Korea? JD.com opens hubs in Incheon, Icheon | Deliveroo launches online retail arm in Singapore to expand non-food delivery offering - MARKETECH APAC

The omnichannel landscape is evolving fast in 2025



Australia



From TikTok to offline



Indonesia



Protecting local business



India



Partnerships to develop local

Source: [How teen sensation Bubble Skincare is bursting into the Australian market – Inside Retail Asia](#) | [Indonesia bans e-commerce firm Temu over fears its small enterprises could be 'destroyed' – CAN](#) | [Shein: Chinese fashion giant re-enters India five years after ban](#)

***AI** even higher with omnichannel*

How generative AI will turbocharge experience and growth



AI will have holistic impact to enable further growth

Internal

External

Demand & Stock inventory

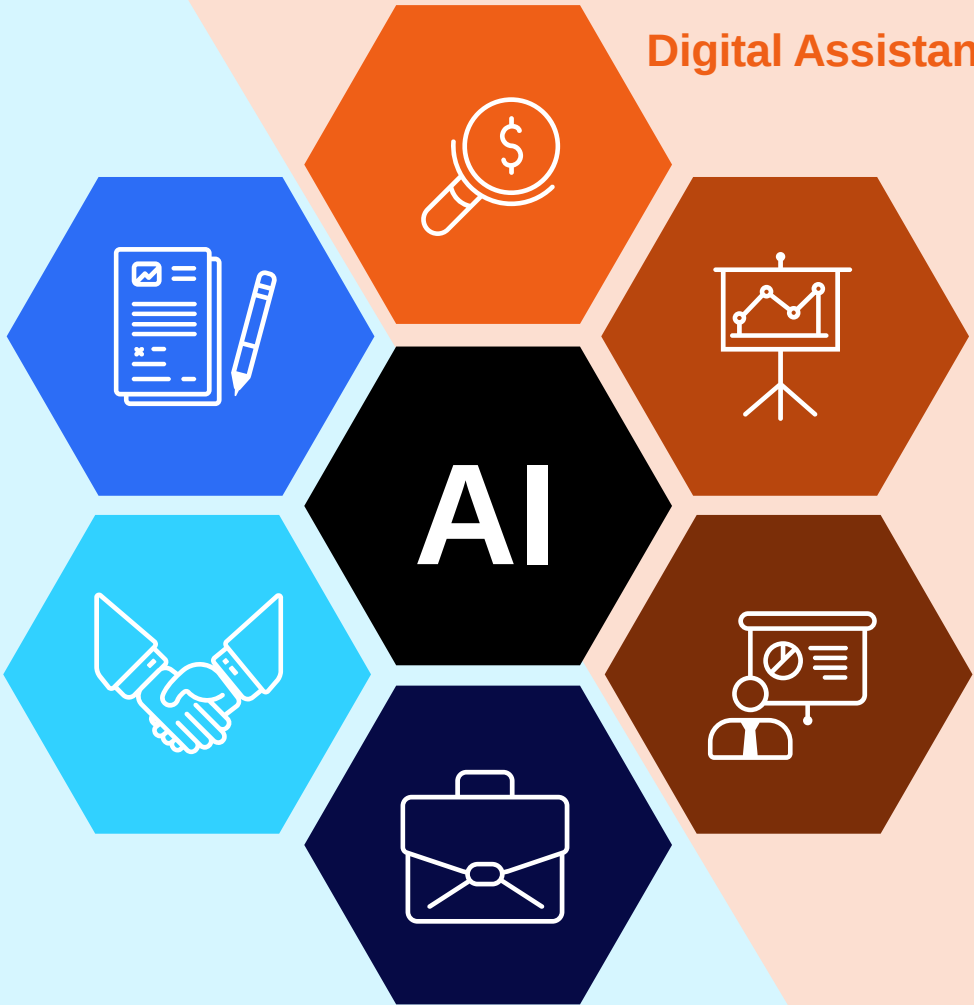
Customer Service

New Product Innovation

Digital Assistant

Automation & Efficiency

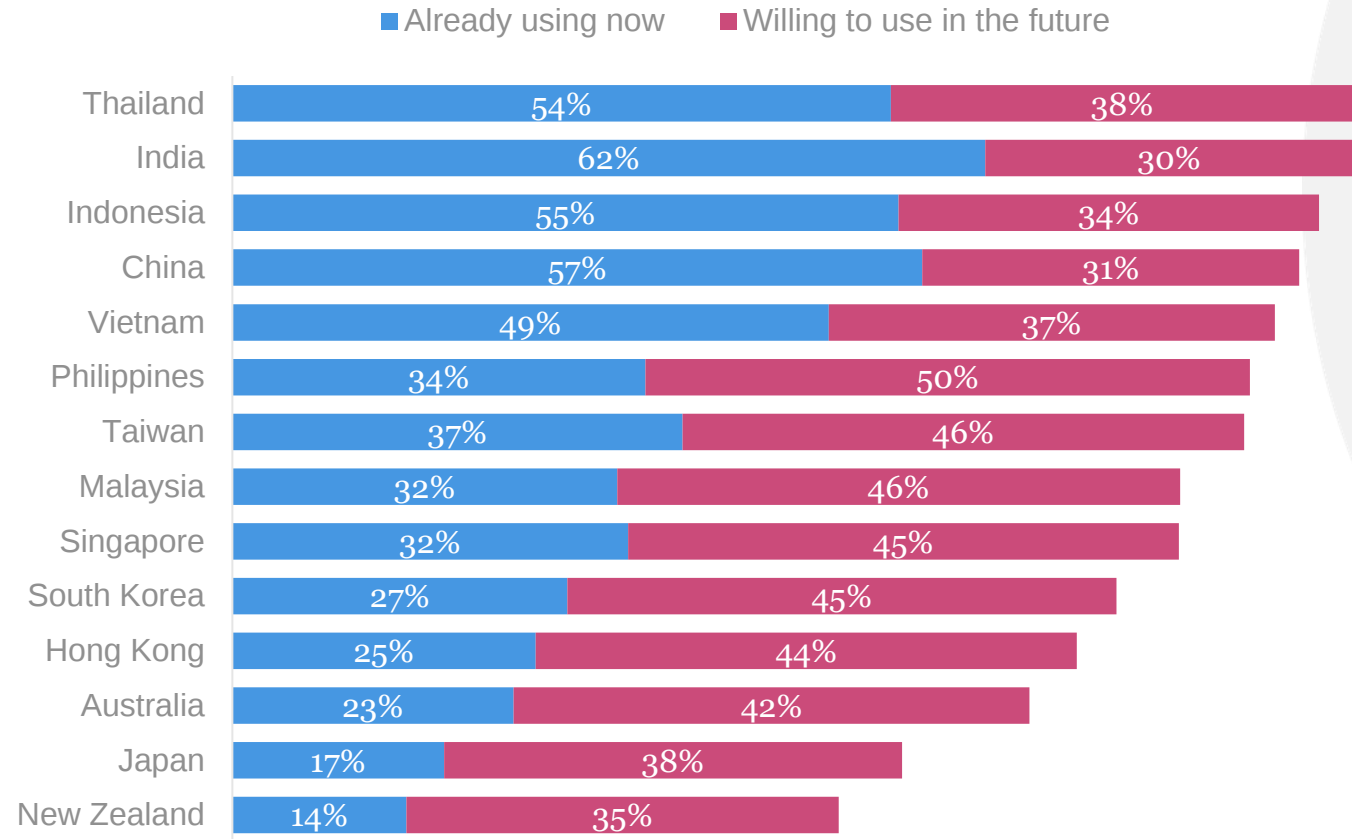
Content Generation



Digital assistant is the most popular usage of GenAI

39% of APAC online shoppers are using Gen AI for recommendations & 40% willing to use in the future

Would you use Generative AI to make recommendations on your online shopping?



Source: NielsenIQ APAC Omnichannel survey June 2025



Digital Assistant

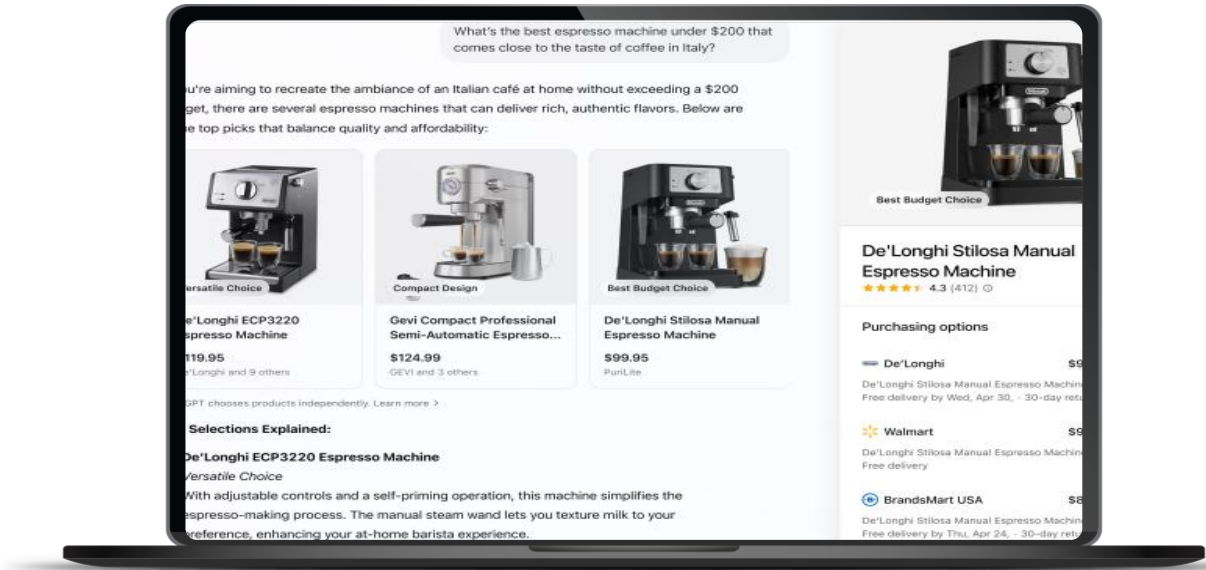
APAC shoppers want to use Gen AI to help them make the right purchases

45% of APAC online shoppers claim that they are willing to use AI agents that can make the decision for them



Digital Assistant

Which of these Gen AI benefits would help you?



Source: NielsenIQ APAC Omnichannel survey June 2025

AI-Agents and Shopping Assistants, to rewrite the Digital Shelf Discoverability Playbook



Digital Assistant

13 Jun 2025 · [Artificial Intelligence](#) · [News](#)

Naver plans AI agent for search engine to integrate services



21 Feb 2025 · [Announcements](#) · [Artificial Intelligence](#) · [Ecommerce](#) · [News](#)

Shopee, OpenAI team up to explore AI shopping tool in SEA



Shopee has announced a collaboration with OpenAI to explore the use of AI agents in Southeast Asia and Brazil.

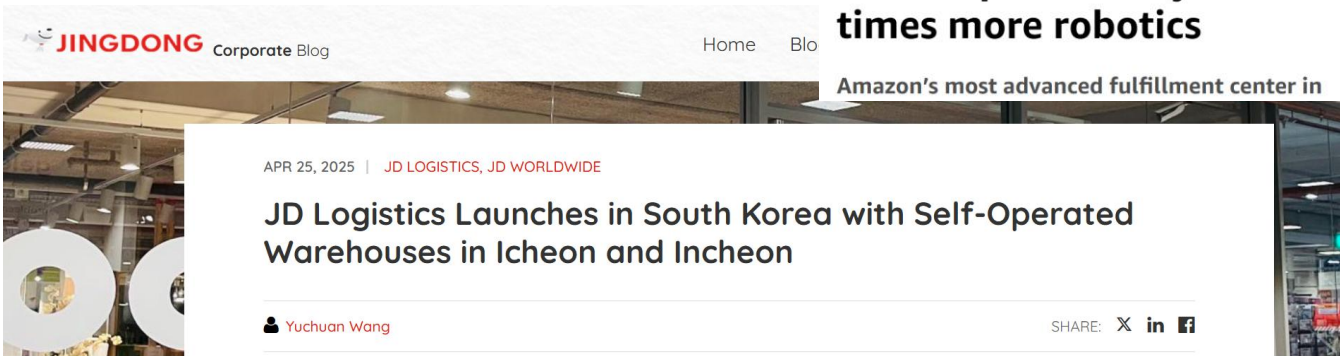
Costs Down, Stocked Up! – Unlocking more Cross-Border Commerce



Demand & Stock
inventory



coupang



Source: Coupang, Inc. - Coupang Named One of the “Most Innovative Companies

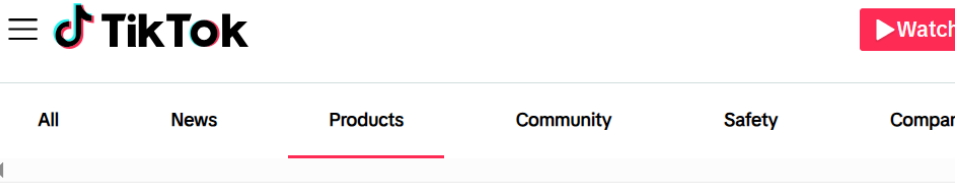
Seamless Experiences for Merchants drives more \$



1-Second Response Time and 90% Decision Accuracy Intelligent Assistant for Merchants

JD.com’s Intelligent Merchant Assistant is designed to address the various challenges e-commerce merchants face in their operations by providing 24/7 operational support. Merchants can communicate directly with the intelligent assistant on the Jingmai (京麦) platform, whether they need to inquire about operational rules or execute quick function operations, with responses achieved in as little as one second.

The foundation of the merchant assistant’s algorithms is built on a multi-agent system based on large language models, simulating the collaborative operational methods of real-world e-commerce teams. This system effectively addresses the complex decision-making entire process from product listing and commerce operations, covering the communication and data analysis. It offers merchants functionalities such as pricing strategies, and opportunity keyword recommendations. Currently, it achieves individual system operations with response times as fast as one second.



Automate, Measure and Maximize: TikTok Building For The Future With New Performance Advertising Solutions

Share this post

Over the past five years, TikTok has grown to be the **global entertainment platform** with over 1 billion users, and a destination for advertisers to authentically connect with their community to turn discovery into results.

Today at Advertising Week, TikTok is introducing new advertising solutions to help brands achieve real business results with the launch of new **automated Performance Tools**, additional **Measurement Capabilities** and **new Privacy Technologies**.

NIQ brings GenAI to e-com to identify the consumption trend for innovation

Latest skin care category trend with the recent 6 months vs. last year eCommerce data in China



**Product
Innovation**



1. Pre - sale Marketing Explosion

- Top - tier Growth: Pay Deposit (4,551,150.9%), Add to Cart (1,057%)
- Promotional Strategies: Buy One Get One Free (179.4%), Early Purchase (589.2%)

2. Anti - aging Track Remains Hot

- Cutting - edge Ingredients: Placenta Extract (427.3%), Collagen Stick (76.5%), Recombinant Collagen (40.9%)
- Efficacy Demands: Age Reversal (137%), Cream Firming (200.9%), Lifting (69.8%)

3. KOL Live - streaming Selling Effect is Significant

- Top Live Streamer: Li Jiaqi (181.7%)
- Same - style Effect: Same Style (139.3%), Super Red Bottle (644.7%)

4. Ingredient - focused Consumers Dominate the Market

- Star Ingredients: Amide (511.2%), Calendula (120.5%), Imperial Bee Essence (64%)
- Skincare Concepts: Nourish Skin with Oil (81%), Cell Repair (615%)

Predictions for omnichannel in Asia Pacific in the next 12 months



Value expected

- Uncertainty from tariffs, inflation and possible recessions will drive consumers to be even more value conscious and a continued surge in retailers that communicate these values.
- *Communicate value for money & optimize promotion efficiency*



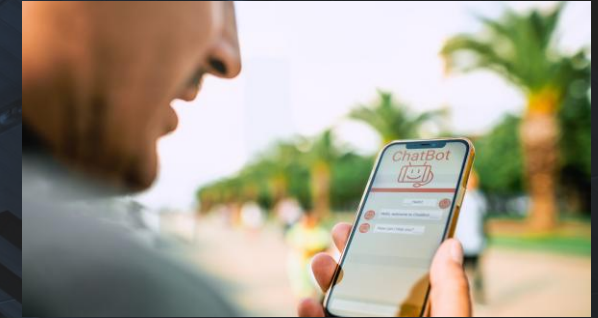
Regional expansion

- We expect more cross-border and country expansions from retailers TikTok shop, TEMU, Coupang, Shopee, JD.Com etc. as automation supports efficiencies, and advancements of competitive differences. *Look beyond just your market and categories for new growth*



Convenience evolves

- From quick commerce to convenience stores, consumers' need for speed will accelerate, but so will their expectation for experience and expertise.
- *Relentlessly drive physical availability and innovate with convenient offerings*



AI empowers

- In the omnichannel environment AI will be a key weapon to drive personalised engagement and execution, but it's not a silver bullet
- *Leverage AI to stand out on the digital shelf, develop breakthrough innovations & everyday efficiencies*

Thank you

If you have any questions, please visit [our website](#) and submit your inquiry. A local expert will get in touch with you shortly.

