



Shoppertainment 2024:

THE FUTURE OF CONSUMER & COMMERCE

here in APAC



Accenture was invited by TikTok to develop this whitepaper for commercial use

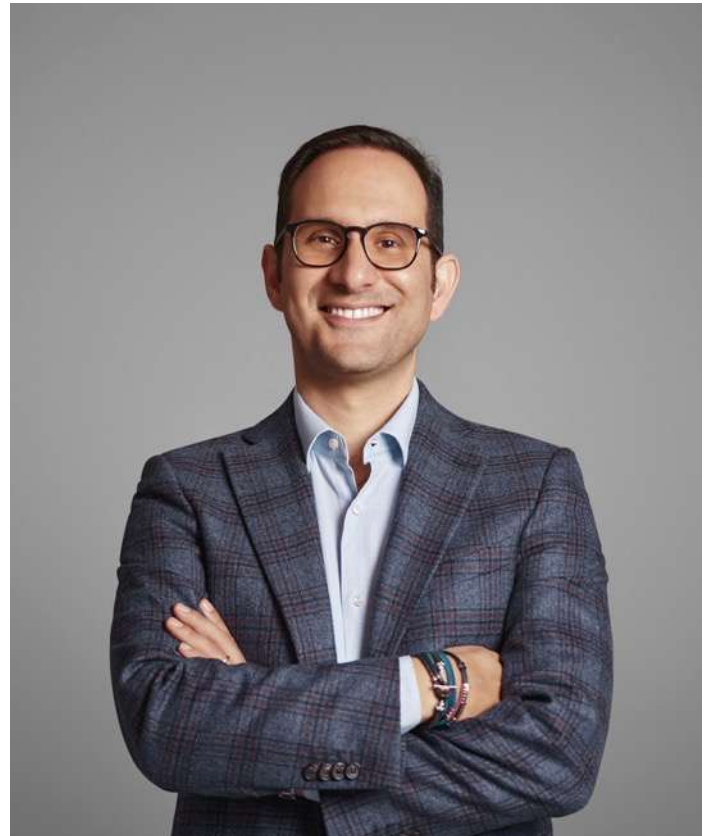
Foreword

Shopping used to be a joyful experience. However, the emergence of e-commerce has shifted its focus to competitive pricing and transactional efficiency.

In Asia Pacific, we believe the next big commerce opportunity lies in bringing consumers back into the picture – prioritising their emotional needs through Shoppertainment. It is defined as content-driven commerce that entertains and educates first. We find that this approach improves brand-consumer connections across various business models, from marketplaces and direct-to-consumer to TikTok Shop.

Commerce on TikTok hits differently in two ways. One, we take an entertainment-first approach, as our mission has always been to inspire creativity and bring joy. With over 1 billion users engaging with their ForYou Page, content on TikTok has evolved to not only entertain audiences, but also drive purchase decisions. Two, the Age of Content has democratised creativity and creation, where everyone is empowered to participate in interest-based communities like BookTok and BeautyTok, creating beacons of influence among consumers.

With Accenture, we have put together this whitepaper that highlights how content shapes consumer behaviours, and in turn defines the trajectory of growth for businesses today. We hope brands can tap on TikTok to shine the spotlight on consumers through the content they create.



Shant Oknayan

Head of Global Business Solutions
Asia-Pacific, Middle East, Africa & Central Asia, TikTok

Foreword

The USD \$1 trillion Shoppertainment opportunity in Asia Pacific remains valid. Brands have been driving a sizeable part of this growth over the past twelve months.

Established brands can no longer afford to ignore this fastest growing channel. The risk is losing market share and missing out on the opportunity to build valuable brand moments with their consumers.

This latest research between TikTok and Accenture reveals that content is at the core of Shoppertainment, from discovery to purchase. Merely opening a shopfront on content-driven platforms and offering competitive prices does not suffice. Brands need to harness content for sustained growth.

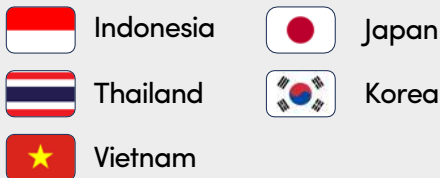


September Guo

Managing Director
Social Commerce Lead, Southeast Asia, Accenture

Research approach

We conducted focus groups (n=23), and online surveys (n=765) with consumers across five Asia Pacific (APAC) markets

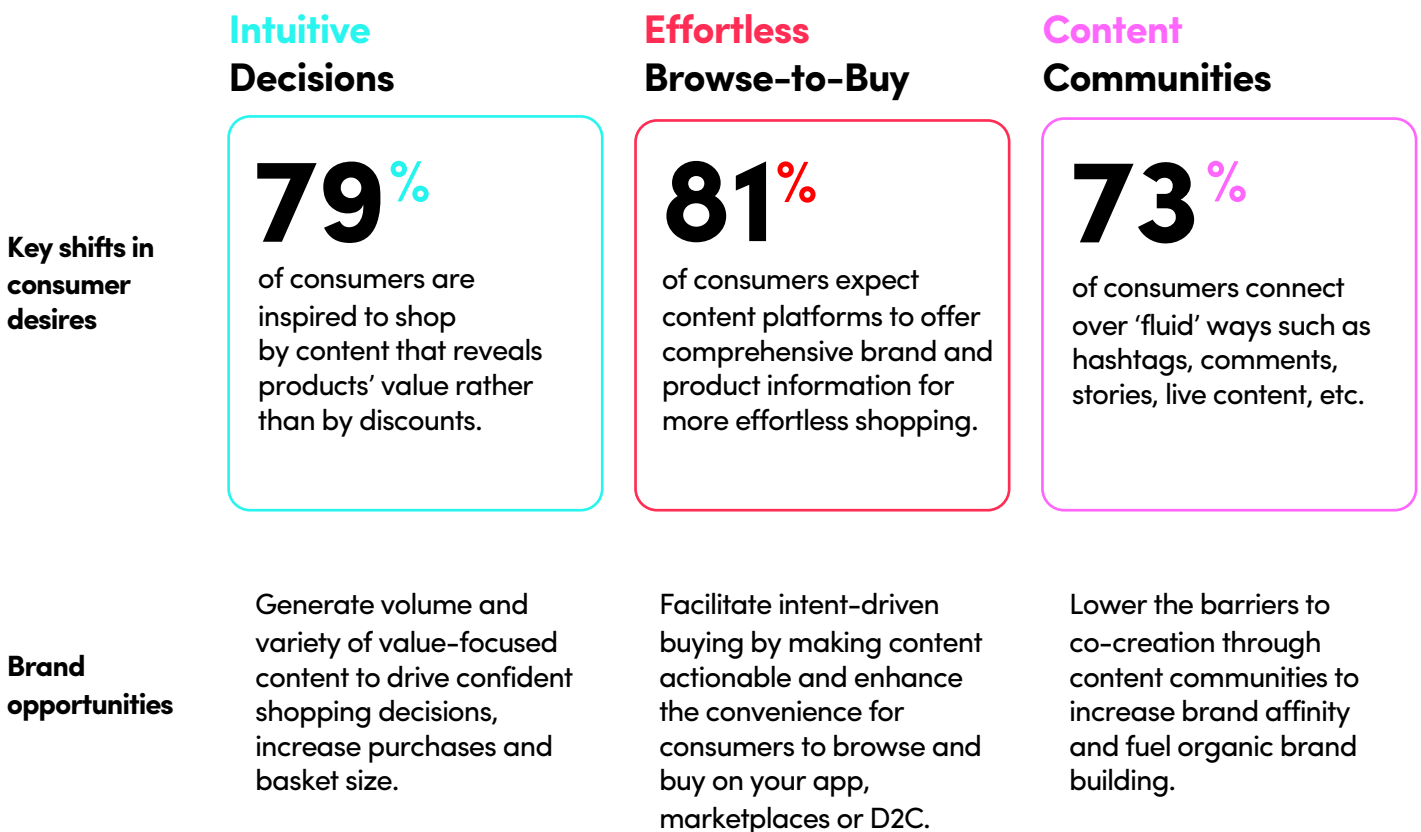


- Content-driven platforms: social media and/or entertainment platforms centered around content such as TikTok, Facebook, Instagram, YouTube, Twitter or X, and forums like Reddit (including consumers who are non-TikTok users)
- Holistic experience: content-driven platform usage, browsing and buying across channels, content creation, and community interactions
- Current experience (behaviours, preferences, and frustrations), and desires in the next 1-2 years (via concept testing)
- Diverse demographics: age, gender, and income

Source: 'Shoppertainment: APAC's Trillion-Dollar Opportunity'

Executive summary

There are three fundamental shifts, which lay the foundation for brands to thrive in Shoppertainment, across the domains of content-centricity, full-funnel optimisation, and the creator ecosystem. First, consumers are moving away from impulsive, discount-centric purchases, seeking content that reveals the true value of products. Second, there is a growing demand and expectation for content to elevate shopping experiences and facilitate browse-to-buy across platforms. Third, the rise of content communities emphasises the shift from brand-driven to community-driven networks.



Market archetypes

In Shoppertainment, brands often categorize markets based on factors like market maturity or regional differences. Typically, Southeast Asian markets are seen differently from Japan and South Korea. But there are some surprises. While consumer preferences for discovery, search and purchase and the influence of communities remain consistent, the content that motivates purchases differs. For instance, in Indonesia, discounts and product information have a big impact, similar to Japan. In contrast, South Korea is more like Thailand and Vietnam, where recommendations by creators and other platform users play a more significant role.

Source: Accenture quantitative survey (n=765) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

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Intuitive Decisions



Consumers want to consider and make more intuitive and confident decisions, not buy impulsively.

Content empowers consumers to see the true value of the product, without needing extra effort to validate.

Key questions

What content triggers shopping across the consumer decision journey?

What content drives confidence to buy without needing extra validation?

What content triggers shopping across the consumer decision journey?

Shift from price to value

Consumers do not want to be rushed to buy just because of discounts. They value the experience of buying as much as the purchase itself. Hence, they desire content that brings the product to life, and allows them to experience its value.

On content-driven video platforms, content that enables users to experience and believe in a product's value influences purchase decisions more than discounts.

Brands should focus on Content Formats that influence shopping across the consumer decision journey: 'what catches their attention', 'what they consider and evaluate', and 'what convinces them to buy'.

79%

of consumers are influenced by other types of content which are not related to discounts

Only 21% of consumers are highly discount-sensitive*

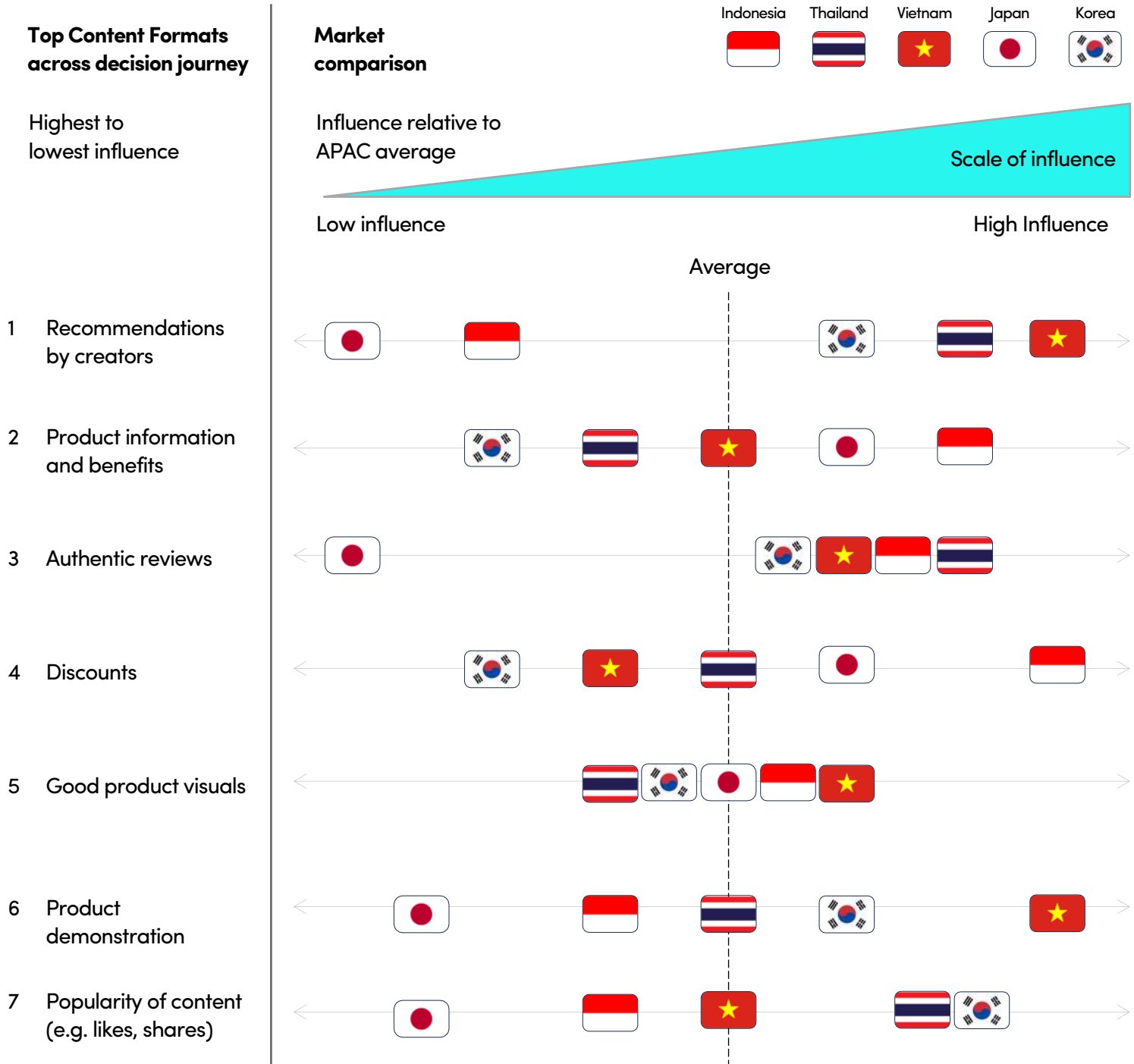
**Influenced by content featuring discounts across two or three stages of the decision journey*



Source: Accenture quantitative survey (n=765) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

Content Formats by market

Several Content Formats have been identified across the consumer decision journey. Across APAC countries, the top three types of Content Formats are 'Recommendations by creators', 'Product information and benefits', and 'Authentic reviews'. However, each market has distinct preferences. The chart depicts Content Formats and each markets' response to each of them, from highest to lowest degree of influence.



The aggregate sum of responses across the three stages of the decision journey, for each Content Format, was normalised against the mean of the 5 markets. The depicted order of influence excludes the consumers who indicated they are influenced by content featuring discounts consistently across all three journey stages.

Source: Accenture quantitative survey (n=765) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

Market archetypes

There are two distinct market archetypes: Social-oriented, and Product-oriented. Consumers in Social-oriented markets (Thailand, Vietnam, and South Korea) lean towards reviews and recommendations from creators, and are more likely to leverage their intuition to assess the content they watch, enabling them to confidently decide to forgo additional research. On the other hand, consumers in Product-oriented markets (Japan, and Indonesia) prioritise content about product information and deals. They focus less on who is recommending or reviewing, but more on what information and deals are communicated by them.

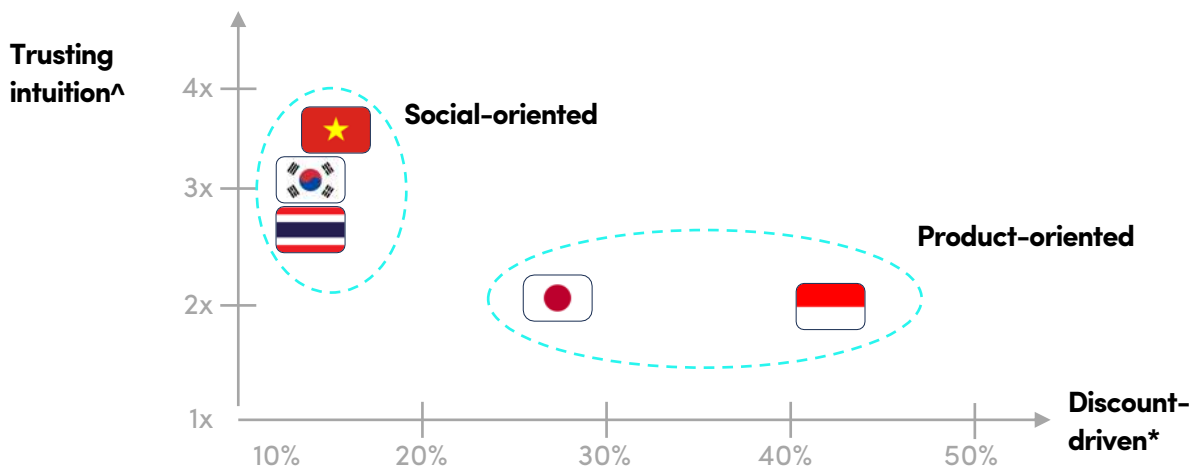


Social-oriented

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



Market Spotlight: Thailand and Japan



Thai consumers are more likely to be influenced to shop because of recommendations by creators.



For the bicycle, I was convinced each time I saw the video of one guy [...] I think that if I were to have it, I can be the same as him – as if I am the rider.

Male, 44, Thailand



Japanese consumers are more likely to be influenced by discounts and deals. They need logical reasons and facts to justify the premium.



I follow brands online to keep track of information and deals. A thing that I do a lot of is reposting to get a free coupon.

Male, 40, Japan

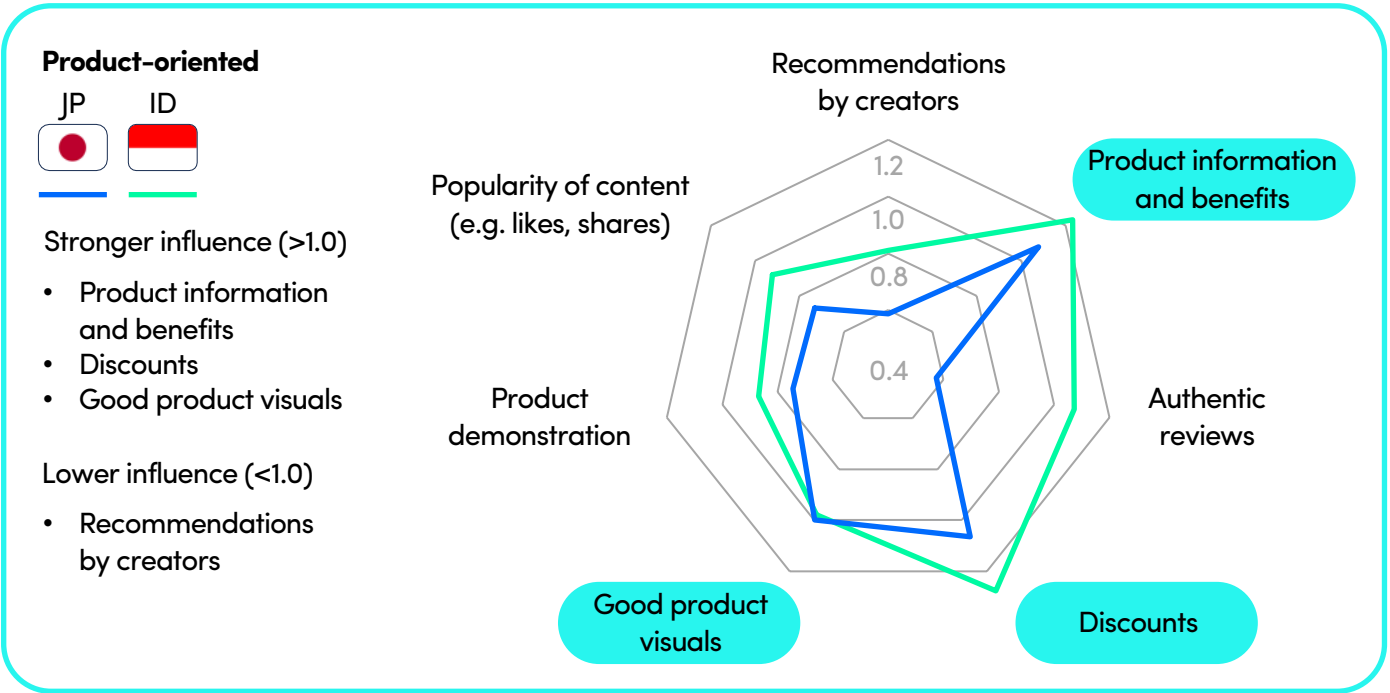
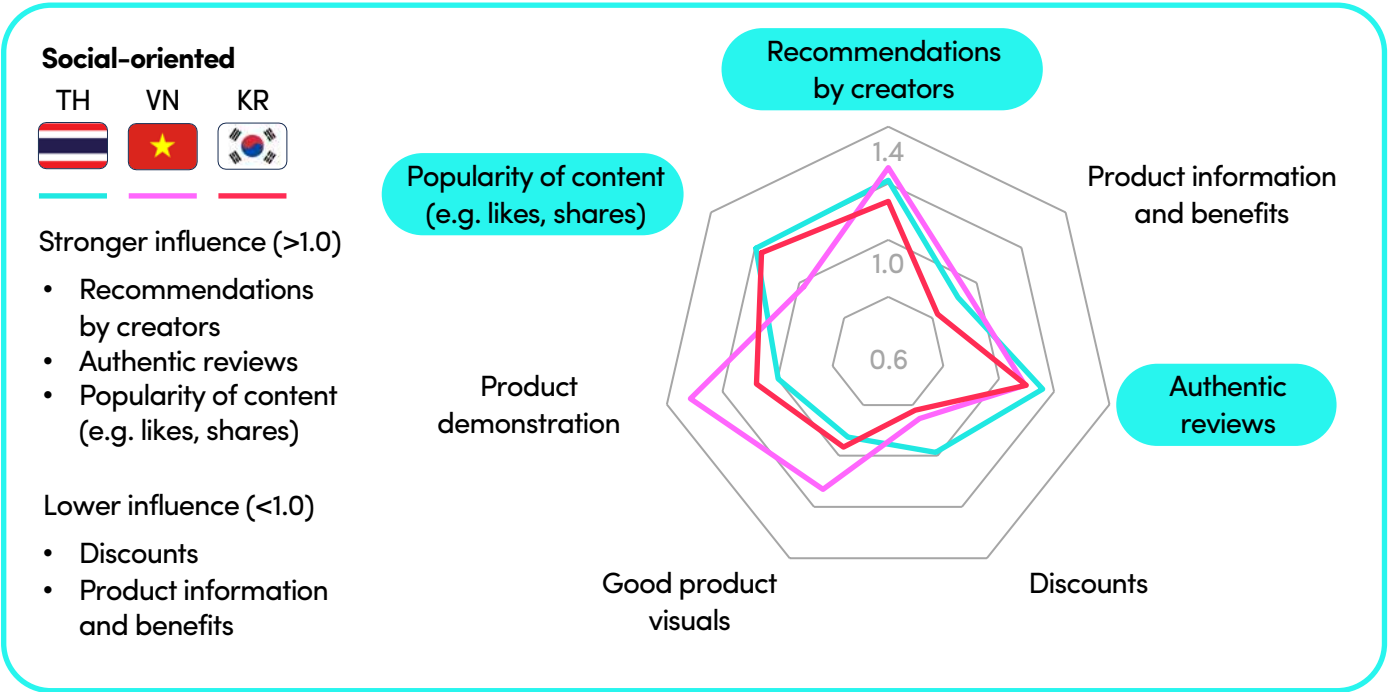
[^]More likely to trust intuition when buying, without doing additional research (those who regularly shop on content-driven video platforms vs. other online shopping channels) – Vietnam (3.2x), South Korea (3.1x), Thailand (2.7x), Japan (2.1x), Indonesia (2.0x)

^{*}Discount-driven (influenced by discounts across two or three stages of the decision journey) – Thailand (12%), South Korea (12%), Vietnam (14%), Japan (27%), Indonesia (41%)

Source: Accenture quantitative survey (n=765) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

Content Formats by market archetype

The charts below depict the degree of influence each Content Format commands within each APAC market. These differences align with the archetypes of Social-oriented (Thailand, Vietnam, and South Korea) and Product-oriented (Japan, and Indonesia).



The aggregate sum of responses across the three stages of the decision journey, for each Content Format, was normalised against the mean of the 5 markets. The charts depict Content Formats in order of influence for APAC – in clockwise order from the top – where highest influence is 'Recommendations by creators' and lowest influence is 'Popularity of content (e.g. likes, shares)'. The depicted order excludes the consumers who indicated they are influenced by content featuring discounts consistently across all three journey stages.

Source: Accenture quantitative survey (n=765) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

What content drives confidence to buy without needing extra validation?

Content Attributes

Content Formats alone may not be enough to influence consumers to consider buying. They may instead ‘trigger’ questions and doubts about the product or its suitability. That said, consumers do not want to go out of their way to search for more information, they would rather make decisions intuitively – through the content they consume.

There are three types of Content Attributes that get consumers to deeply resonate with a product’s value in meaningful and tangible ways. When consumers believe in a product’s benefits and can see how it really suits their needs and lifestyles, they are more likely to feel confident about buying. This empowers them to make an informed decision without the effort of finding and considering additional information.



Emotional Resonance

Present products in novel and aspirational ways

Authentic Expression

Communicate benefits in credible and believable ways

Relatable Realism

Showcase products as they are in real-world contexts



Expert Opinion 

Brand content that creates an experience around the product – that displays benefits or creates new contexts in a way that brings new meaning – is particularly successful with consumers.

Vincent Teo,
Brand Strategy Lead, Accenture Song, Southeast Asia

Emotional Resonance

Present products in novel and aspirational ways

When a product’s value proposition is presented in fresh or unexpected ways, consumers become convinced of the product’s unique practicality and benefits.

By featuring desirable lifestyles, content drives resonance with consumers. They do not just desire the product but see the product as a means to becoming like the creator, or to attain the depicted lifestyle.

After consumers realise they need the product for its novel benefits or its associated lifestyles, they are convinced of the product’s value, and can avoid extra effort to consider.

“

When creators review the sukiyaki pot, they said that now you must line up for the restaurant for quite long – but if you buy this pot and you cook at home, you don’t need to queue up anymore. And so that encouraged me to buy the pot. I’m not even a great cook. But now I can be!

Female, 23, Thailand



Market Spotlight:

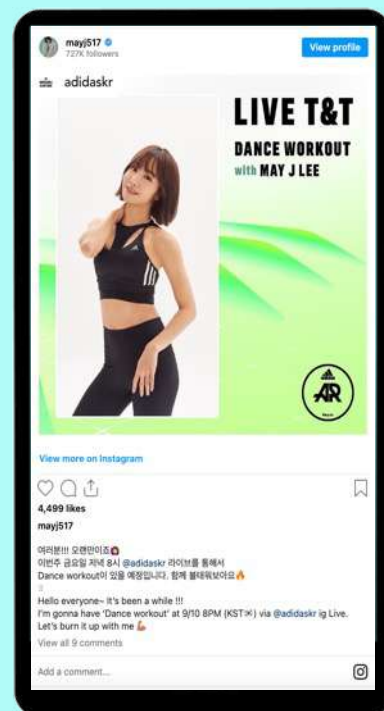
South Korea, Thailand



Social Signalling

Thai consumers of the HENRY (High Earner, Not Rich Yet) segment aspire toward belonging to a higher social stratum. Thai consumers specifically look or ask for ‘pai ya’ from creators they admire. It is loosely translated as a ‘magic potion’ that compels them to buy what is recommended.

South Korean consumers are highly brand-driven and willing to pay a premium for exclusivity – luxury, seasonal or limited-edition products (e.g. collaborations between brands and creators). adidas collaborated with aspirational dancer, May J Lee, to promote their latest sportswear through her choreographed workouts.



Source: Accenture consumer focus group discussions (n=23) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

Authentic Expression

Communicate benefits in credible and believable ways

When content comes from creators who share their actual and honest experience of using and benefitting from the product, consumers find it easier to believe in the product's quality and claims.

Trust is more easily established with creators, and key opinion leaders (KOLs), who have exemplified genuine usage of a product, who demonstrate before and after transformations, or who speak with credibility and expertise.

Through content, consumers can gather trustworthy opinions, be it positive or negative, leading them to be confident with buying without needing to fact-check.

“

It's pretty influential for me if it's from an expert in skincare, who knows what she's talking about [...] If an expert is doing the explanation, she will be more insightful.

Female, 23 Indonesia



Market Spotlight: Vietnam

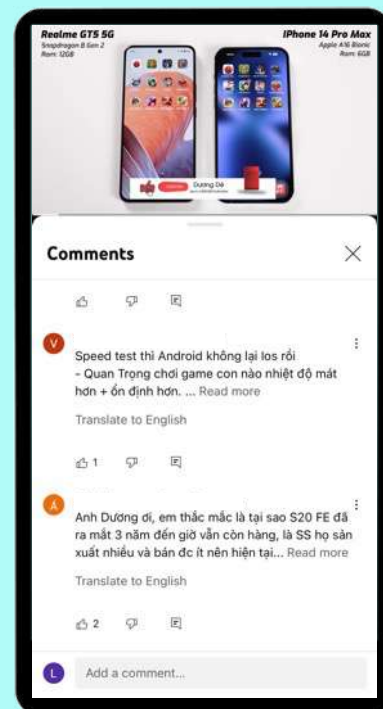


Real Expertise

Vietnamese consumers seek out recommendations by creators and experts. Genuine credibility has become more important than ever before, as the threat of expert impersonations (e.g. fake doctors recommending products) in Vietnam continues to rise.

Established brands should not only partner with credible experts and creators, but also leverage their own credible voice (e.g. sponsored ads).

Duong De is a popular consumer electronics reviewer in Vietnam who is trusted for his tech expertise. He provides deep technical reviews (e.g. phone speed comparison, tech hacks, etc.) for multiple brands.



Relatable Realism

Showcase products as they really are in real-world contexts

When content can portray a product's usage organically through real-life contexts and settings (using real situations, environments, use-cases), the product's usage and value speaks for itself. Consumers are then able to concretely visualise the product's benefit, skipping the need to understand its utility and function in detail.

This is even more effective when the creator of the content closely reflects the product's relevance to a consumer's needs (i.e. they share similar demographics, lifestyle, physical characteristics, etc.). Consumers can then be confident that the product would fit their unique contexts, characteristics, and lifestyles.

“

The person styling his hair had hair that was about the same as mine. He was really good at styling his hair with the hair wax. It made me think I could easily do it too.

Male, 21, Japan



Market Spotlight:

Indonesia

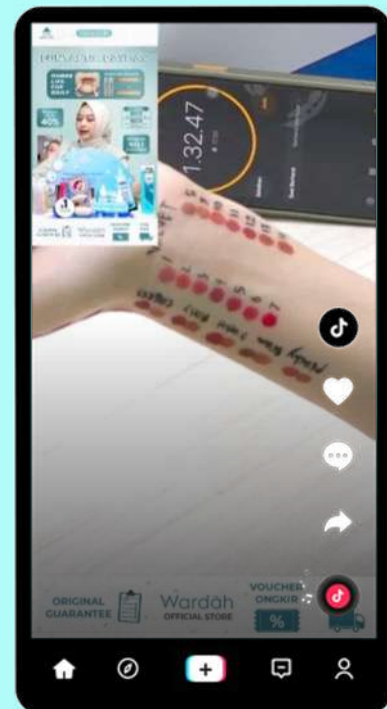


Real in Real-Time

Indonesian consumers look out for information to determine if products are of good quality. As such, they appreciate quality content that showcases a product within real-life contexts.

They particularly like live shopping because it allows them to see products as they really are, from multiple angles.

One brand that is doing this well is Wardah Beauty. Through live shopping, the host applies every shade of lipstick on her hand, and consumers can request the host to perform specific actions, such as providing a closer look on a shade or smudging to test if the lipstick holds.



Case Study



Kao Japan

Introducing a new household detergent in a relatable way for homemakers

Results

7.3M **141%**

Video views

Uplift in ad recall



Content Format

Product Demonstration

Kao wanted to effectively convey the product benefits of the new Attack Zero laundry detergent – effectively measuring the amount of detergent with only one hand.

Content Attribute

Relatable Realism

Kao created a video in collaboration with a popular TikTok creator. The content featured the creator demonstrating the product usage in an everyday setting, showing how easy it is to use the detergent in just one hand while carrying their kid in the other. This resonated not only with the daily needs of caretakers, but also with busy homemakers and professionals, who have to juggle with daily chores.

Source: TikTok Internal Data

What should brands do to empower Intuitive Decisions?

Create value, variety and volume of content

Focus on creating value

- Revisit what value means to your customers, beyond price and discounts. Highlight your brand's uniqueness and product differentiation. Show its benefits in real-life scenarios to define your content focus.
- Experiment with different approaches over time, using data to measure the effectiveness and uncover what resonates most with consumers in terms of distinctive value propositions.

Build volume at scale

- Leverage smart technology such as dynamic creative variation tools to produce a pipeline of content at sufficient volume, refreshing them regularly to reduce creative fatigue.
- Tap into the creator partnership and expert networks for an even higher volume of creative content.

Develop variety

- Establish content variety to drive full-funnel effectiveness, and strategically connect high-performance products with segmented consumer groups.
- Use data to measure the effectiveness, linking variety to goal of the content (e.g. increasing engagement, lead generation or average order value).

Brand Spotlight

“

Shoppertainment is an interesting concept where you combine entertainment and shopping together. Plan first to entertain consumers with your content, and you will be able to get sales back from that content.

Kanes Sutuntivorakoon,
Partner, Mizuhada, Thailand

Looking ahead

Intuitive Decisions through Smart Technology

Consumers have begun using smart technology tools (e.g. ChatGPT) to search for products and get recommendations for what to buy.

Brands should consider how to enhance consumer discovery with smart technologies, which could be facilitated through a chat interface suggesting products to buy, and content to watch.

Effortless Browse- to-Buy



Consumers want to browse and buy via content-driven video platforms, not just discover brands and products.

Content is a magnet that inspires consumers to effortlessly progress from discovery, to consideration, to transaction.

Key questions

Why do consumers want to browse and buy on content-driven platforms?

How can content connect browsing and buying to increase conversion?

Why do consumers want to browse and buy on content-driven platforms?

The new regular

Content-driven platforms (such as TikTok, Instagram and Facebook) are doubly effective: they drive content-triggered shopping and facilitate intent-driven buying through search – positioning these platforms at the epicenter of conversion.

Brand and product content have become harmonious with 'regular' content on content-driven platforms, and consumers will continue to be increasingly open to discovering new brands and products through content-driven platforms.

The wide variety of brand and product content on these platforms makes them go-to destinations for search across the consumer journey – be it for upstream discovery, for content to consider, or downstream when finding products to buy.

69%

Expect brand and product content to be integral to content-driven video platforms, and equally enjoyable (in the next 1-2 years)

1.9x

More consumers regularly search for products on content-driven video platforms (74%) than on search engines (39%)



Source: Accenture quantitative survey (n=765) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

Market archetypes

There exist two distinct market archetypes, distinguished by consumer behaviours in their interaction with brand and product content on content-driven platforms.

In Southeast Asia, consumers from Indonesia, Thailand, and Vietnam are drawn to content-driven video platforms by content that not only entertains, but also aids in their shopping journey. These consumers expect brand and product content to be an integral part of content-driven video platforms, facilitating their shopping experience from browsing to buying.

On the other hand, Japan and South Korea have mixed platform preferences and use traditional search engines alongside video platforms for product discovery. Here, the expectation is to discover brand content both on video platforms as well as through traditional browsing.



Content platform preference

81%

Regularly search on content-driven video platforms. They expect these platforms to offer comprehensive brand and product content, facilitating shopping throughout the purchase journey.



Mixed platform preference

46%

Search on both content-driven platforms and traditional search engines. Consumers expect to discover and interact with brand related content both on video platforms as well as through traditional browsing.

Market Spotlight: Thailand and Japan

“

We do not need to search [the product] in other places... We can buy all at one place.

Male, 25, Thailand



“

If I go to the official website like brand websites, I know it'll have genuine products. I am scared of fake products.

Female, 18, Japan



How can content connect browsing and buying to increase conversion?

Cross-channel

Empower consumers with cross-channel shopping experiences, via alternative browse-to-buy pathways

Some consumers prefer to shop on brand websites or offline, and would like brands to facilitate cross-channel shopping experiences and connect with them via content-driven platforms as well.

However, even when consumers are interested to buy, they may not necessarily want to buy straight away. They enjoy the experience of browsing more content, learning more about the product, or saving to view or buy later, when they feel like it.

“

I want to buy in a natural flow. I don't like to go out of my way to buy it. If it is natural, I'm more likely to buy.

Female, 18, Japan



If I can keep the product for me via online platforms, almost like an online reservation, I would use it often.

Female, 21, Japan



Strategies

Link to brand website

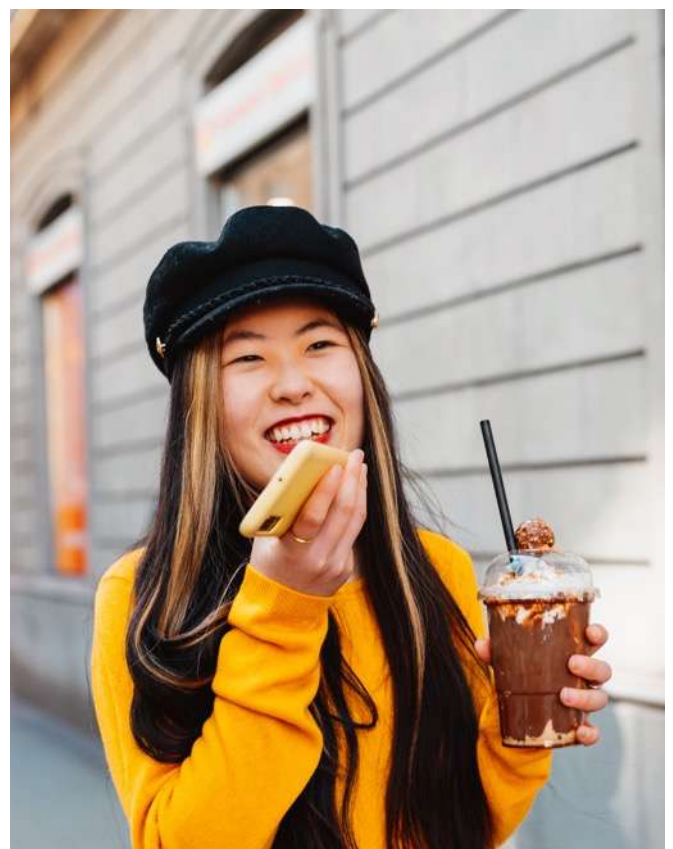
Provides consumers with the flexibility to shop directly from brand websites (in addition to on-platform shopping)

Online-to-offline connection

Drives footfall through information/links (e.g. store location, click-and-collect, invitation to exclusive event)

Browse now, buy later

Gives consumers more options to interact to match their browse-to-buy preferences (e.g. save, learn more)



Source: Accenture consumer focus group discussions (n=23) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

On-platform

Enable consumers to complete their transactions seamlessly on-platform

Once consumers are ready to transact, they want to get that done conveniently – from content that helps them decide, to transacting on-platform all at one go. Many appreciate the convenience and immediacy of browsing and buying on-platform.

This can happen through shoppable content with links, live shopping with embedded buying, and on-platform shopping centers.

Strategies

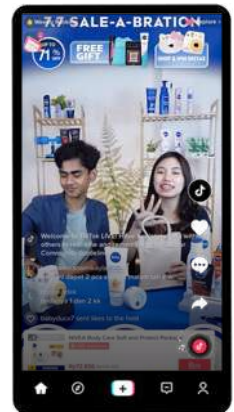
Shoppable content with links

Helps consumers effortlessly get from browsing content to buying the exact product featured in the content in one click



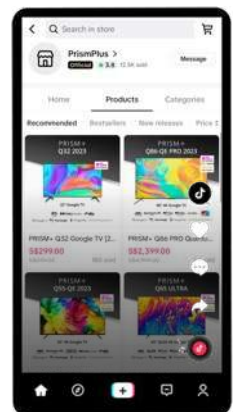
Live shopping

Entertains consumers across browse-to-buy journey, showcasing a wide product range in real-time with live interaction



Shopping center

Provides an on-platform storefront for consumers to browse and buy full offering, and converts traffic from organic, paid media, and search



“

I would like to be able to buy everything through one app. No need to go to different apps.

Female, 28, Vietnam



Case Study



Kiehl's Vietnam

#1 Premium Beauty Brand on TikTok Shop Vietnam

Results

6.7x

Return on ad spend on Video Shopping Ads

+11K

Growth in followers

+43%

Livestream GMV

>3x

Target GMV

On-platform

Kiehl's launched its TikTok Shop in Vietnam to drive incremental sales for the brand's range of natural skincare products for face, hair, and body.

When they first launched, they hosted 40 live shopping streams over 30 days to boost real-time engagement and grow their following.

They used a mix of Video Shopping Ads, and hosted LIVE Shopping, with key products pinned to the stream for easy checkout and exclusive offers.

This resulted in them becoming the #1 Premium beauty brand on TikTok Shop in Vietnam.



GMV: Gross Merchandise Value

Source: TikTok Internal Data

What should brands do to enable Effortless Browse-to-Buy?

Make content shoppable across platforms

Enable cross-channel shopping

- Craft a comprehensive omni-channel strategy by diversifying the roles and engagements across various channels while maintaining a consistent brand experience.
- Empower consumers with cross-channel experiences using shoppable content like live store events, coupon videos for click-and-collect, and exclusive rewards for your online community.
- Measure the effectiveness of an omni-channel strategy using appropriate attribution models and metrics to enhance cross-channel success.

Create native content for better on-platform transactions

- Create native content for each platform to increase effectiveness and drive metrics including engagement rate, average watch time, and view to order.
- Enable on-platform shopping through content-driven video platforms like TikTok Shop. Generate content and sales across in-app touchpoints (such as shop tab, shoppable videos, live shopping).

Brand Spotlight

“

Other e-commerce platforms do not have video content like TikTok Shop and are not entertaining. On those platforms, customers already have a need to buy products and it's a highly competitive place to sell.

Nguyễn Kao Toàn,
CEO of Quê Việt Food, Vietnam

Looking ahead

Effortless Browse-to-Buy Across Categories

Consumers are often not consuming content about just one product or brand only. Brands should leverage content and shopping features to enable consumers to browse and buy across brands and categories (e.g. offering complementary bundles, shop the look), etc.

Content Communities



Consumers want to connect freely with other consumers, not just one way with brands.

Content facilitates dynamic communities, driving new forms of co-creation.

Key questions

How has content reshaped brand influence?

What drives consumers to connect and co-create?

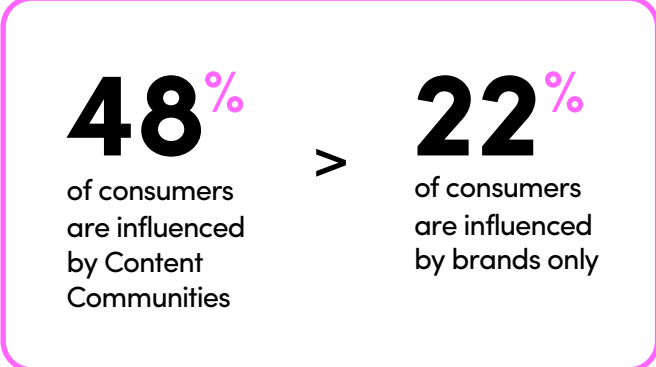
How has content reshaped brand influence?

Strangers with influence

Content Communities are networks of brand and product content that drive interaction and co-creation among consumers and brands.

Consumers are shifting from current brand-driven formats (e.g. memberships, account following, apps, etc.) towards these communities, to discover and curate content about brands and products.

Content algorithms are driving this change, delivering more personalised content to consumers. In contrast to the exclusivity and one-way interaction model of brand communities, the hyper-personalised platform experiences within Content Communities lower the barriers to interaction, compelling co-creation and deeper connection.



Consumers are connecting and influencing each other through Content Communities, so much so that these strangers have become a key source of influence. Therefore, brands need to start leveraging the influence of Content Communities to increase their share of influence, beyond brand-driven approaches to loyalty.

	Content Communities	Brand Communities
Medium	Fluid: hyper-personalised and algorithm-driven content, delivered through hashtags, trends, comments, stories, etc.	Transactional: official and exclusive content delivered through memberships and accounts
Interaction	Casual, two-way engagements with other consumers and brands	One-way, locked-in, passive, disconnected from other consumers
Motivation	Connected, compelled to influence and co-create with consumers outside immediate connections	Access to information, events, products, discounts, and privileges

Source: Accenture quantitative survey (n=765) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

Market archetypes

There are two market archetypes based on sources of influence. Indonesia, Thailand, and Vietnam are more influenced by Content Communities relative to brands – so brands should prioritise growing their share of influence through Content Communities. On the other hand, while consumers in Japan and South Korea are also influenced by Content Communities, brands continue to have a sizable influence on consumers. Hence, brands should continue to maintain their influence through brand channels, while fostering influence in Content Communities.



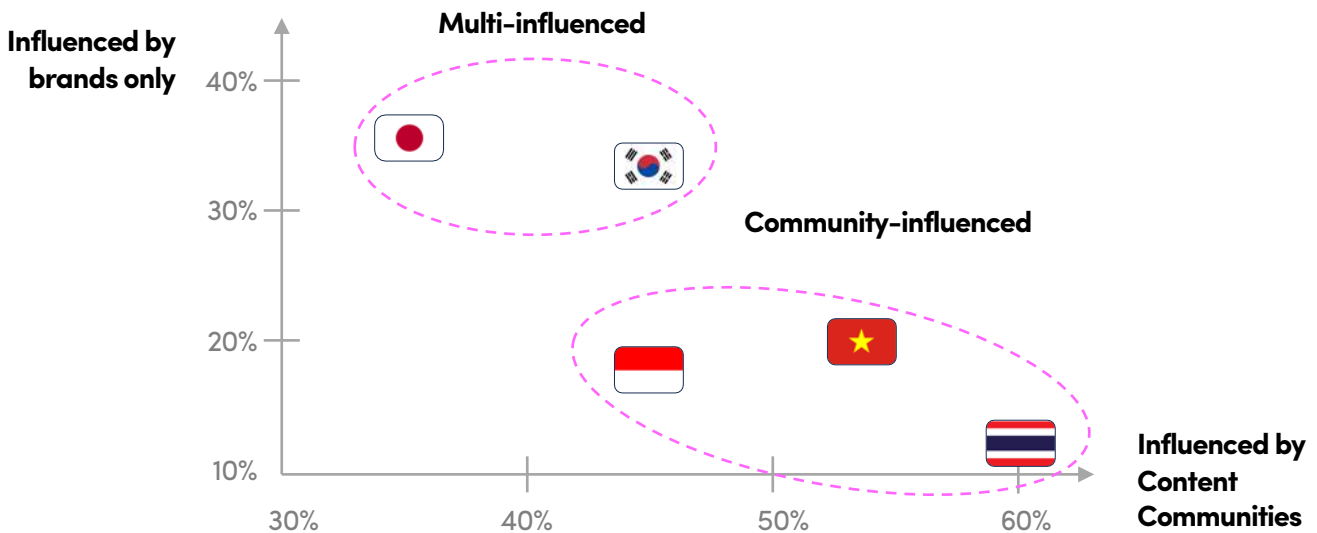
Community-influenced

More consumers influenced by Content Communities than by brands only



Multi-influenced

Equally influenced by Content Communities and brands



Market Spotlight: Vietnam and South Korea



Vietnamese consumers are highly communal, and turn to each other for credible information, more so than brands.



I would rather trust real consumers than brands. Brands persuade me to buy because they have to sell. Consumers review pros and cons.

Female, 28, Vietnam



South Korean consumers are influenced by content from both brands and other consumers in the community.



I trust brand marketing and advertising – but if other consumers use the product, I will feel more motivated to buy.

Female, 36, South Korea

Influenced by brands only – Thailand (11%), Indonesia (18%), Vietnam (20%), South Korea (33%), Japan (35%)
 Influenced by Content Communities – Japan (34%), South Korea (45%), Indonesia (45%), Vietnam (53%), Thailand (60%)

Source: Accenture quantitative survey (n=765) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

What drives consumers to connect and co-create?

Hyper-Personalised Platform Experience

Hyper-personalised and algorithm-driven content, delivered through hashtags, trends, comments, and stories

Instead of consumers having to find products, algorithms are delivering hyper-personalised and relevant content about brands and products to consumers – through new mediums like hashtags, comments, stitches/duets, stories, filters, polls, live content, etc.

Consumers are cognisant of the algorithm and are intentionally interacting with content in these mediums to receive better brand and product recommendations.

Furthermore, hyper-personalised platform experiences lowers the barriers to content interaction and participation as consumers do not have to create from scratch. They also find it easier and more fun to respond to what has already been created by others in the community, building on the growing collective narrative.

This signifies that co-creation has evolved to be as integrated and concurrent as the consumption of content itself.

50%

of consumers are interacting with the algorithm (e.g. commenting, liking, sharing, etc.) to stay up-to-date

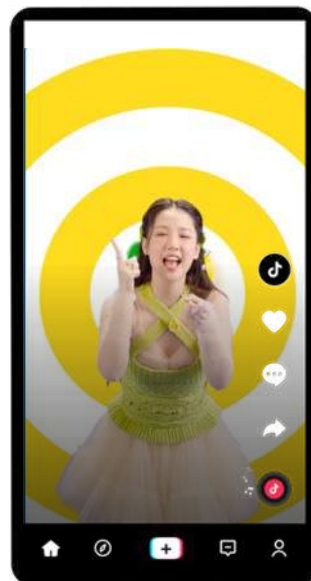
73%

of consumers are creating content in 'fluid' ways through trends (e.g. hashtags and challenges), contributing in comment sections, etc.

“

I prefer to keep up (with brand and product content) via hashtags or trends. It's more modern. It's also more recent, easy to watch, and convenient.

Male, 21, Vietnam



Garnier Vietnam created a signature music track and dance routine for a #GiGiGiGi hashtag challenge, encouraging a passionate community of consumers to bounce along to the tune.

Source: Accenture consumer focus group discussions (n=23) and Accenture quantitative survey (n=765) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

Casual Exchanges

Comfortable, casual interactions that allow for two-way information exchange

Within comfort zones

Consumers like sharing quickly, conveniently, and as and when they feel compelled to share and connect – as though speaking with friends and family. They enjoy sharing about products they like, but dislike feeling pressured to post in a way that feels overly-curated or performative.

Market Spotlight: Thailand Keeping it Casual

Thai consumers are open to engaging with other consumers online for brand and product interests (even more so than their friends and family). However, there is a lot of social pressure to post something 'perfect' on their main feeds, and they would rather tap into more casual mediums as there is less pressure to 'perform' and overthink.

“

I don't like to do official reviews. I do stories because that is only for a short period of time. The feeling I get is like talking to a friend, telling them how good a product is and why I like it.

Male, 25, Thailand



Two-way dialogue

Consumers engage with others in back-and-forth exchanges to learn from other like-minded individuals. They enjoy these two-way conversations as they have the space to ask unfiltered questions.

Market Spotlight: Japan Information Exchange



Japanese consumers use comments sections as review sections. Those who post, want to provide information to other consumers, and in turn, get feedback and reactions. Those who read the comments, receive valuable information, and have an easy medium to ask questions to others.

This creates free-flowing conversations around brands and products, compared to more formal product review formats.

Social Motivations

Motivations that encourage consumers to co-create – to feel social validation and belonging, and share good products

Celebrate good finds

Consumers are especially compelled to connect when they are pleased with what they have bought, especially products that have improved their lives. They create content to help others going through similar experiences, and are notably doing so without need for monetary rewards. They enjoy giving back to the community, which has helped them before.

Market Spotlight: Indonesia Altruistic Sharings

Indonesian consumers are most likely to celebrate and share brands and products when they like it. They do it in the uniquely Indonesian spirit of ‘gotong royong’ (translated as ‘mutual assistance’), to help one another.

“

I posted because I was thinking that a lot of other girls might have the same struggles with their skin. For me, the product was really beneficial and helped me a lot. It might help them as well.

Female, 27, Indonesia



Social validation

What compels consumers to interact with and create content about brands and products is not brand loyalty. Rather, they co-create to connect with other consumers. When posting within these communities, people feel a stronger sense of belonging and validation, as people receive positive feedback and reinforcement from those who share similar characteristics and interests as they do.

Market Spotlight: South Korea Feeling Seen



South Korean consumers enjoy the feeling of social validation and affirmation more so than the other markets. They are trend followers, and garnering likes, comments, and shares on their posts reaffirms their identity as trend-savvy, and up-to-date individuals.

Source: Accenture consumer focus group discussions (n=23) in Indonesia, Thailand, Vietnam, Japan and South Korea; Accenture analysis

Case Study



Lay's Thailand

Leveraging user-generated content and a branded effect to drive engagement



Results

21.5%

Uplift in online ad awareness

133,400+

Total video creations

21.9M

Viewers reached

Hyper-Personalised Platform Experience & Casual Exchanges

Hashtag campaign

While borders remained closed, global potato chip brand Lay's stepped up with three travel-inspired flavours for Thai consumers craving a return to travel.

To feed the message to fans and drive engagement, the brand launched a hashtag challenge, complete with the brand's logo and TikTok Branded Effect.

Consumers jumped at the chance to pose with both real-life and virtual packets of the new flavours, as they found it easy and fun to use the filters and add a hashtag.

Social Motivations

Content community

By posting, sharing, and creating content about their travel wishes, consumers felt more connected to each other, even while in lockdown at home.

The campaign was such a success amongst Thai consumers because it alleviated lockdown blues, positioning Lay's as a brand that is fun, fresh, and very human.

Source: TikTok Internal Data

What should brands do to leverage Content Communities?

Build a community that encourages co-creation

Think and act like a creator

- Brands who show up as a part of their own community are embraced for it. Cultivate a community in spaces where your audience frequently gathers to browse and connect with fellow members.
- Evolve loyalty programs by fostering two-way interactions and casual exchanges. Lower barriers to co-creation by encouraging users to create via fluid mediums such as leaving comments, post-purchase reviews or sharing.

Expert Opinion

“

Loyalty is evolving. Brands started looking for newer measurements of loyalty and affinity, such as comments, likes, and shares. Social interaction within communities has become a fundamental way to enrich existing loyalty programs and connect with customer segments.

Violeta Tofilat

Experience Transformation Director,
Accenture Song

Explore the power of co-creation

- Whether they are loyal customers or micro influencers, they will become brand advocates, actively engaging in co-creation to expand your content community.
- Allow creators to issue challenges (e.g. new hashtag trends) and kickstart discussions about your brand. When these challenges resonate with users, they're likely to join, spurring user participation.
- Continue to onboard new creators with different interests adjacent to your brand, these will lead to an increase in varied content for users to connect with.

Content Communities with Conversational Commerce

Looking ahead

Consumers increasingly prefer discussing brands and products on messaging apps, presenting a valuable opportunity for brands to tap into these channels. By leveraging smart technology to analyze feedback and insights, brands can create hyper-personalized product offerings and tailored content that resonate with consumers.

Closing statement

The winning formula for content and commerce has changed. Brands cannot solely rely on traditional approaches and must evolve to keep up with local and digitally native brands, who have mastered Shoppertainment.

1. Instead of solely relying on discounts to trigger shopping, brands should create content that helps consumers make informed decisions more intuitively and confidently.
2. Brands should leverage cross-channel or on-platform strategies to drive meaningful call-to-actions, enabling more effortless and convenient shopping experiences.
3. In addition to loyalty efforts and campaigns via brand channels, brands need to tap into more fluid ways of online participation and co-creation to increase influence and organic brand building.

“

With the power of short-form videos and recommendation systems, instead of people looking for products, products are now looking for people. The #TikTokMadeMeBuyIt cultural force — born out of a platform where content educates and influences purchase — epitomises this shift.

We encourage brands to embrace Shoppertainment and put content in the heart of their commerce strategy. This enables brands to engage a generation of shoppers that confidently browse & buy as they consume and co-create content.

Ng Chew Wee

Head of Business Marketing
TikTok, APAC



Key takeaways for brands

Intuitive Decisions

Generate volume and variety of value-focused content to empower intuitive decisions, by infusing Content Formats with Content Attributes – which increase purchases and basket size.

Social-oriented

Product-oriented



KR

TH

VN

JP

ID

Content Formats

Prioritise formats that influence consumers to shop across the decision journey.

- Recommendations by creators
- Product information and benefits
- Authentic reviews
- Discounts

Content Attributes

Infuse content with attributes that get consumers to deeply resonate with a product's value in meaningful and tangible ways.

- Emotional Resonance
- Authentic Expression
- Relatable Realism

Effortless Browse-to-Buy

Facilitate intent-driven buying by making content actionable and enhance the convenience for consumers to browse and buy on your app, marketplaces or D2C.

Content platform preference

Mixed platform preference



ID

TH

VN

JP

KR

Cross-channel

Empower consumers with cross-channel shopping experiences, via alternative browse-to-buy pathways.

- Link to brand website
- Online-to-offline connection
- Browse now, buy later

On-platform

Enable consumers to discover, browse, and buy seamlessly in one platform.

- Shoppable content with links
- Live shopping
- Shopping center

Content Communities

Lower the barrier for participation, by encouraging user-generated content and creating hyper-personalised platform experiences with Casual Exchanges and Social Motivations, to increase brand affinity.

Community-influenced

Multi-influenced



ID

TH

VN

JP

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Hyper-personalised Platform Experience

Leverage types of content interactions with low barriers to participation (e.g. hashtags, comments, stitches/duets, stories).

Social Motivations

Motivate co-creation by encouraging consumers to celebrate good product finds, catalysing social validation and belonging.

Casual Exchanges

Facilitate comfortable, casual interactions that allow for two-way information exchange.

Glossary

Online Platform/ Content-Driven Platform	Social media and/ or entertainment platforms centered around content (e.g. TikTok, Instagram, YouTube, Facebook, Twitter or X, Reddit)
Shoppertainment	Content-driven commerce that seeks to entertain and educate first, combining content and community to create highly immersive shopping experiences
Content	Any medium (e.g. video, text, image, ad, hashtag, comment) that features brands and product, and can be from various sources (e.g. brands, creators, other consumers)
Intuitive Decisions	When consumers choose to buy based on content that empowers them to see the true value of the product, enabling them to buy confidently, without needing to validate
Content Formats	Types of content that trigger shopping, significantly influencing consumers across the decision journey: 'what catches their attention', 'what they consider and evaluate', and 'what convinces them to buy'
Content Attributes	Content attributes which allow consumers to deeply resonate with a product's value in meaningful and tangible ways, empowering them to skip the extra effort to consider more information
Browse-to-Buy	The transition between consuming content to consider a product and buying the product, and back-and-forth
Cross-channel	Alternative browse-to-buy pathways that give consumers flexibility (e.g. brand website, physical stores, etc.)
On-platform	The functionality or experience where consumers can discover, search, and make purchases within a single online platform
Content Communities	Networks of hyper-personalised brand and product content that drive interaction and co-creation among consumers and brands
Hyper-Personalised Platform Experience	Types of content formats with low barriers to participation (e.g. hashtags, comments, stitches/duets, stories)
Casual Exchanges	Comfortable, casual interactions that allow for two-way information exchange
Social Motivations	Motivations that encourage consumers to co-create – to feel social validation and belonging, and share good products

Acknowledgements

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