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From transactional to transformational:

How APAC retailers win the next wave of loyalty

Moments, not messages, move the dial

Digital isn't just a side-channel anymore; it's the environment where shoppers operate. Across Asia, consumers rely on superapps** and mobile-first habits; discovery, payment, and service operate in a seamless flow, reducing decision-making to minutes. Meanwhile, the GCC (Gulf Cooperation Council) is expanding rapidly, Kearney (2020) projected that GCC e-commerce could reach ~US$50B by 2025, driven by smartphone adoption,[1] logistics improvements, and cross-border interest.

In Australia, 9.8 million households shopped online in 2024, spending over A$69 billion, with marketplaces playing a significant role in growth[2] and older consumers increasing their spending. Buying behaviour is now habitual, spread across devices, and judged more on speed, clarity, and relevance rather than just the number of promotions.

In both regions, the brands that succeed are those that coordinate the right moment in the right channel, in the correct language and time zone. Gen Z in SEA is especially impatient with friction; they expect mobile-first experiences, native language content, and instant, channel-specific updates, ranging from price drops to pick-up alerts.[3]

Technology is raising expectations even higher. The Global System for Mobile Communications Association (GSMA) forecasts that 5G will support about half of APAC mobile connections by 2030, enabling sub-second notifications, dynamic content, and store-aware handoffs.[4] Consumers are already demanding personalisation: 71% want tailored interactions, and 76% get frustrated when relevance is lacking. Getting this right can lead to a 10–15% increase in revenue.[5] However, trust remains the limiting factor. Even as Google plans to keep third-party cookies in Chrome in 2025, APAC regulators continue to tighten rules on consent and transparency (Singapore PDPA, India DPDP).[6] The most resilient approach is prioritising first- and zero-party data, which helps deliver fewer, well-timed touches and extends beyond marketing into fulfilment, where reliable delivery becomes crucial for building trust.

This report is for leaders seeking that next step: transitioning from calendar-led campaigns to moment-based, cross-functional journeys rooted in credible evidence. It is complemented by APAC and GCC case studies, and tailored for both marketing and technology/data decision-makers.

*** Superapps combine shop, pay, chat and services in one interface*

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The digital default - why context beats campaigns in 2025

E-commerce growth in Australia has become a fundamental part of the market. Price sensitivity and the convenience of online marketplaces have established a baseline where the 'default' shopping journey seamlessly switches between app, website, and store, sometimes within the same transaction. Consumers evaluate their experience based on how little effort it takes to get what they want: transparent pricing, clear availability, accurate ETAs, and straightforward returns.

In Southeast Asia, the baseline is centred around superapp behaviours. Shopping, paying, chatting, and earning rewards are all integrated into one interface, reducing the time between discovery and purchase. Micro-moments, such as back-in-stock, price drops, low stock, pick-up ready, and

channel mix, should feel natural, using push notifications, in-app messages, SMS, or WhatsApp where suitable. In the GCC, rapid e-commerce growth and widespread smartphone use increase the importance of localisation (language variants), multi-tender payments (cards, wallets, BNPL), and cross-border expectations (duty, delivery windows).[7]

With 5G set to connect nearly half of APAC by 2030, sub-second alerts and store-aware content will feel seamless, not like marketing.[8] Calendar-based blasts will seem clumsy; real-time orchestration aligned to needs, inventory, and consent will feel natural.

What the data says - evidence that personalisation and orchestration pay

Across studies, the pattern is consistent: Personalisation reduces effort, orchestration multiplies the effect. McKinsey's benchmark links effective personalisation with a 10-15% revenue uplift and shows widespread consumer expectation for relevance.[9] *Harvard Business Review*'s study of 46,000 shoppers found omnichannel customers spend more and return more often than single-channel customers, evidence that retailers should design combinations, not rank channels in isolation.[10]

Case in point - Central Retail (Thailand): Speed and scale, not just theory

Challenge: Multiple business units and brands were running disjointed campaigns across different tools, slowing execution and confusing customer experiences.

What they did: Central Retail migrated to a unified cross-channel framework in less than 50 days, standardising identity and events, then coordinated journeys in a single platform (e.g., onboarding, cart/browse recovery, price-drop/low-stock alerts). They linked data sources through the Braze Alloys partner ecosystem, so catalogue, inventory, and transaction signals could trigger messages in near real-time.

Outcome: 97.5 million messages were delivered in the first two months, with journeys aligned across email, push, in-app and SMS.

Why it matters: Large retailers can respond quickly when data plumbing and orchestration are integrated, which shortens time-to-value and ensures consistent customer experiences across brands.[11]

Case in point - Styli (KSA/UAE): ROI and velocity in the GCC

Challenge: Styli needed to expand effectively across dynamic GCC markets, localising communications while lowering campaign setup costs.

What they did: The team used Canvasflow to design lifecycle journeys (activation, first-to-second purchase, churn-risk) and Braze Catalogues to inject live product data (price, availability) into messages. The team conducted disciplined A/B tests on channel pairs (email + push; in-app + SMS/WhatsApp) and automated holdouts to prevent fatigue.

Outcome: plus 50% ROI, plus 15% user activation, plus 21% sign-ups, and 40% reduction in build time, demonstrating both growth and operational leverage.

Why it matters: Personalisation doesn't have to be slow or costly; catalogue-driven content and journey automation can boost returns and cut effort in mobile-first GCC markets.[12]
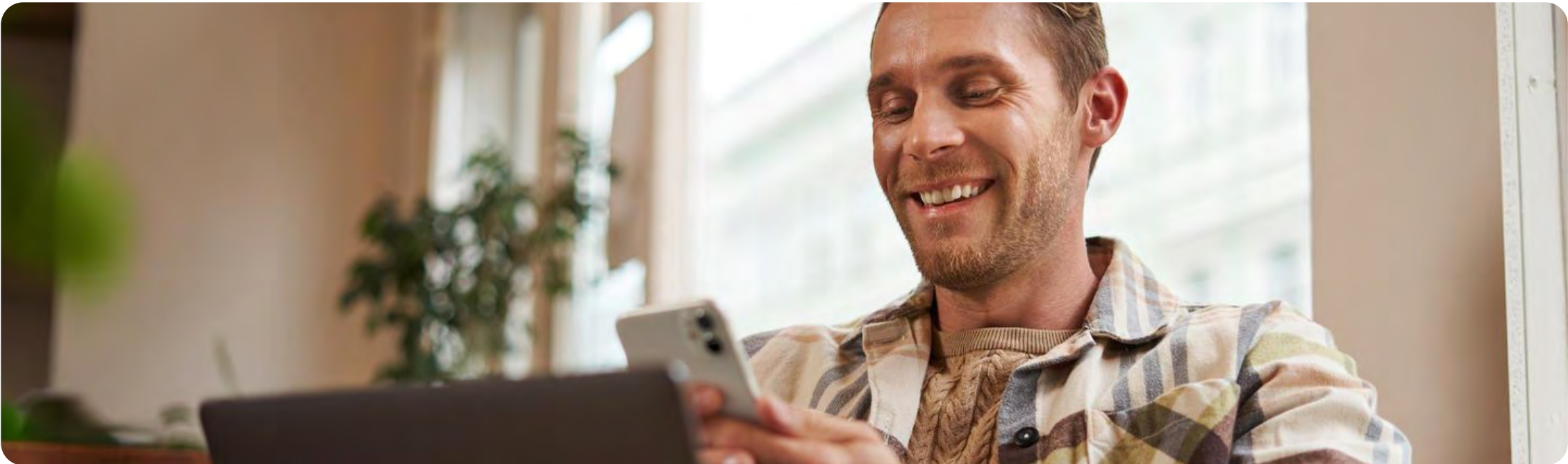
Case in point - Sephora SEA: Guided discovery that converts curiosity

Challenge: Mobile shoppers browsed colour cosmetics but dropped off before trying the AR "Virtual Artist", limiting confidence and conversion across various SEA markets.

What they did: Developed a behaviour-triggered journey (push + in-app) targeting users who viewed relevant products without launching augmented reality; used deep links directly into try-on, localised copy and timing by market, and fatigue controls; A/B-tested framing (benefit versus feature) and channel pairing.

Outcome: 28% increase in AR try-on adoption, with improvements in session depth and add-to-cart likelihood among AR users.

Why it matters: In beauty retail, fit and confidence influence purchase decisions, guided discovery during the moment of intent, rather than more messages, lessens effort and enhances both experience and commercial results across mobile-first, multilingual SEA settings.[13]

Privacy reality check - first-party data is the resilient path

Google's April 2025 decision to retain third-party cookies in Chrome delays one deadline but does not alter the overall direction.[14] APAC policy is moving towards greater consent, transparency, and accountability. Singapore's PDPA guidance explicitly emphasises the need for consent in marketing.[15] India's DPDP Act (2023) formalises consent-based processing with extraterritorial reach.[16] *Australia's Privacy and Other Legislation Amendment Act 2024* adds new obligations and remedies, including requirements for transparency around automated decisions.[17]

In SEA and the GCC, opt-in mechanics, language variations, and channel-specific consent (e.g., WhatsApp/SMS) are as important as creative choices. If you can't trust and transfer consent data, you can't safely personalise at speed. The best approach is to collect first- and zero-party data with explicit permission, unify it across touchpoints, govern it strictly, and support a culture that views privacy UX as part of the product, not just a footer.

What enables this? BrazeAI™

AI within the engagement stack (e.g., send-time, path, and content optimisation) helps teams determine the next-best action and shorten testing cycles from weeks to hours, boosting conversion rates without increasing frequency. In practice: more relevant moments, less noise.

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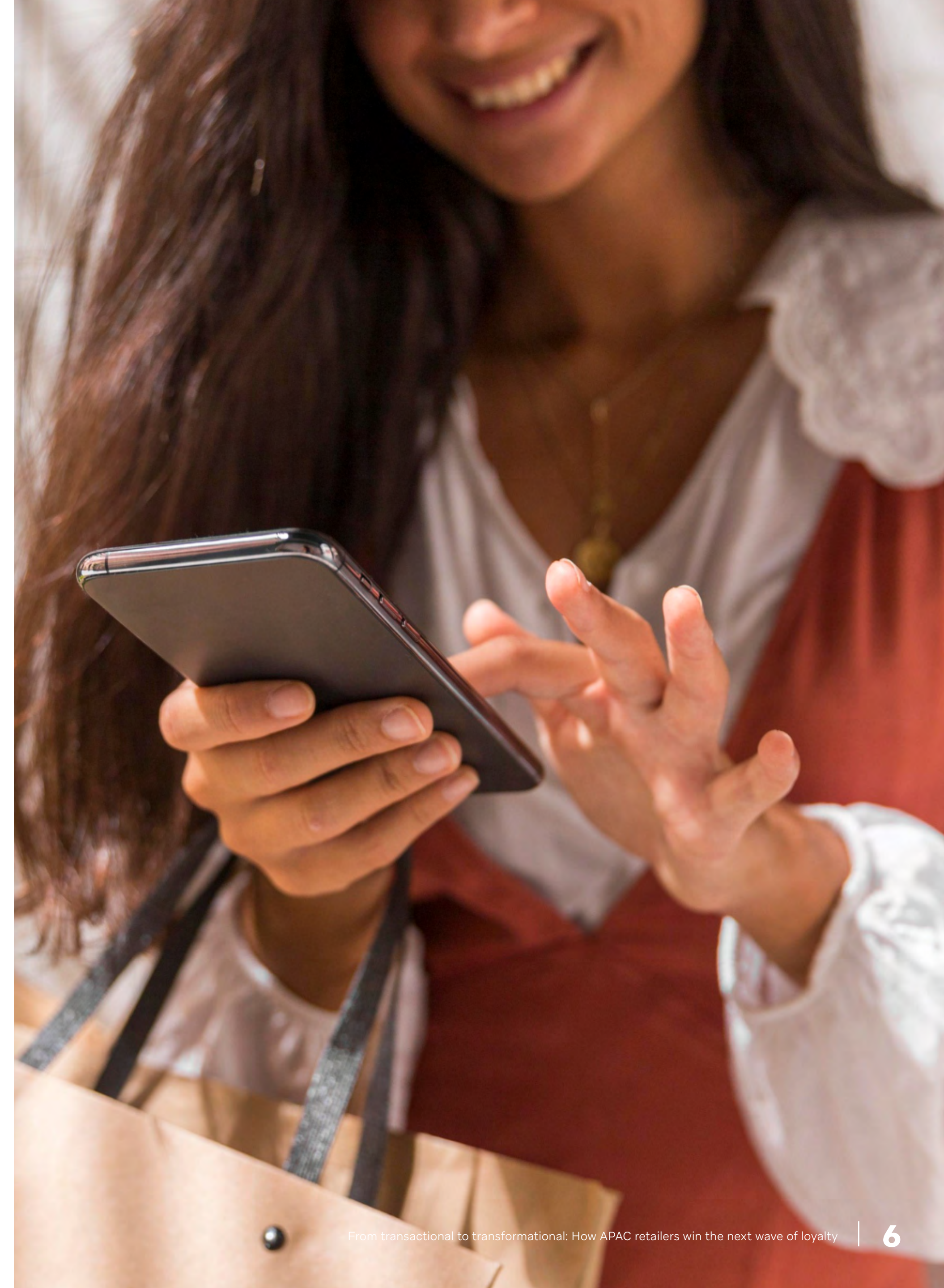
Data, not duct-tape - the Alloys ecosystem

A mature partner ecosystem across data warehouses, CDPs, analytics, payments, loyalty, and advertising keeps identity and events flowing in real-time, allowing triggered journeys to listen and act within seconds. For technology leaders, this shortens time-to-value and reduces brittle, custom integrations.

# Implications for leaders - operate journeys, not channels

If engagement is a system, data quality and consent are its integrity checks. Organisations that can recognise a customer across app, web, and store with auditable consent can push personalisation further and faster. Frequency caps, fatigue, and regulatory risk will trap those that can't.

Structurally, the HBR's study on omnichannel shoppers advocates for moment pods rather than channel silos, where cross-functional teams are responsible for onboarding, the first-to-second purchase, replenishment, win-back, and returns.[18] These teams can pause when supply is limited or pivot when delivery SLAs are at risk. The Australia Post trust signal brings Operations into the same room: order status, ETA, exceptions, and returns are not just back-office tasks; they are frontline loyalty levers.[19]

For CIOs and CDOs, the business case is clear: integrations through an ecosystem and AI-assisted orchestration cut build time, speed up migration timelines, and improve hard outcomes.

For data leaders, monitor 'journey-contributed revenue' and 'activated users → first purchase' as pipeline-related KPIs to show that orchestration influences commercial results, not just engagement figures. Turn this into a roadmap with ROI and velocity goals for each quarter.

Here are five moves for the next 6–12 months
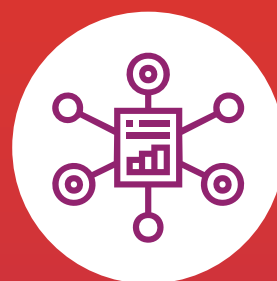
Build a consent-first identity framework and make it everyone's responsibility

Treat first- and zero-party data as essential infrastructure. Unify logins, emails, device IDs, and store identifiers; capture granular consent at each interaction point; and display preferences and status to marketing, product teams, service, and stores. This approach enables responsible personalisation despite the cookie landscape and allows you to operate at the speed SEA and GCC markets require.

Shift from calendars to moments to unlock the measurable upside

Use behavioural triggers (onboarding, first-to-second, replenishment, price-drop, back-in-stock, churn-risk) to replace volume with relevance. Aim for McKinsey's 10–15% uplift benchmark and draw confidence from the cases: Central Retail's rapid scale-up, Styli's ROI/velocity, Petz's compounded growth and Erewhon's loyalty outcomes.

Expand orchestration beyond marketing, own delivery, and returns communications

If reliable delivery is a key trust factor, then order status, ETA updates, exceptions, and returns options are essential engagement moments. Collaborate with Operations to enhance these areas to increase repeat purchases and reduce "where is my order?" enquiries. Apply the same event logic and urgency strategies that improve conversion before purchase to reassure customers after purchase.
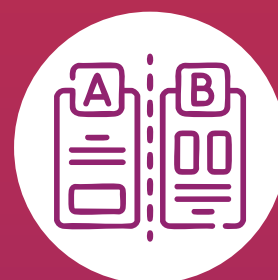
Prove the channel mix with disciplined A/B testing; combinations outperform silos

Stop ranking channels in isolation. Within each journey, test single- vs dual-channel variants (e.g., email + push for onboarding; in-app + SMS/WhatsApp for time-critical nudges). Keep the combinations that reduce effort and fatigue. Expect feature-adoption wins like Sephora SEA and conversion lifts like 24S/Overstock when the mix matches the moment.

Invest where mobile leads, leveraging 5G responsiveness to reduce effort

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