iab.
sea+india

winning the scroll:
social commerce playbook for southeast asia & india

FIRST EDITION
JANUARY 2026

iab.
sea+india

social
commerce
council 2025

dentsu   Google   ∞ Meta   ♪ TikTok   tyroo   WPP Media

winning the scroll:
from discovery to purchase…
all within the scroll

Social commerce is transforming how consumers in Southeast Asia and India discover and buy products. In these markets, where most people shop on phones and people trust recommendations from content creators, buying products seamlessly happens directly within social apps, often without leaving the platform.
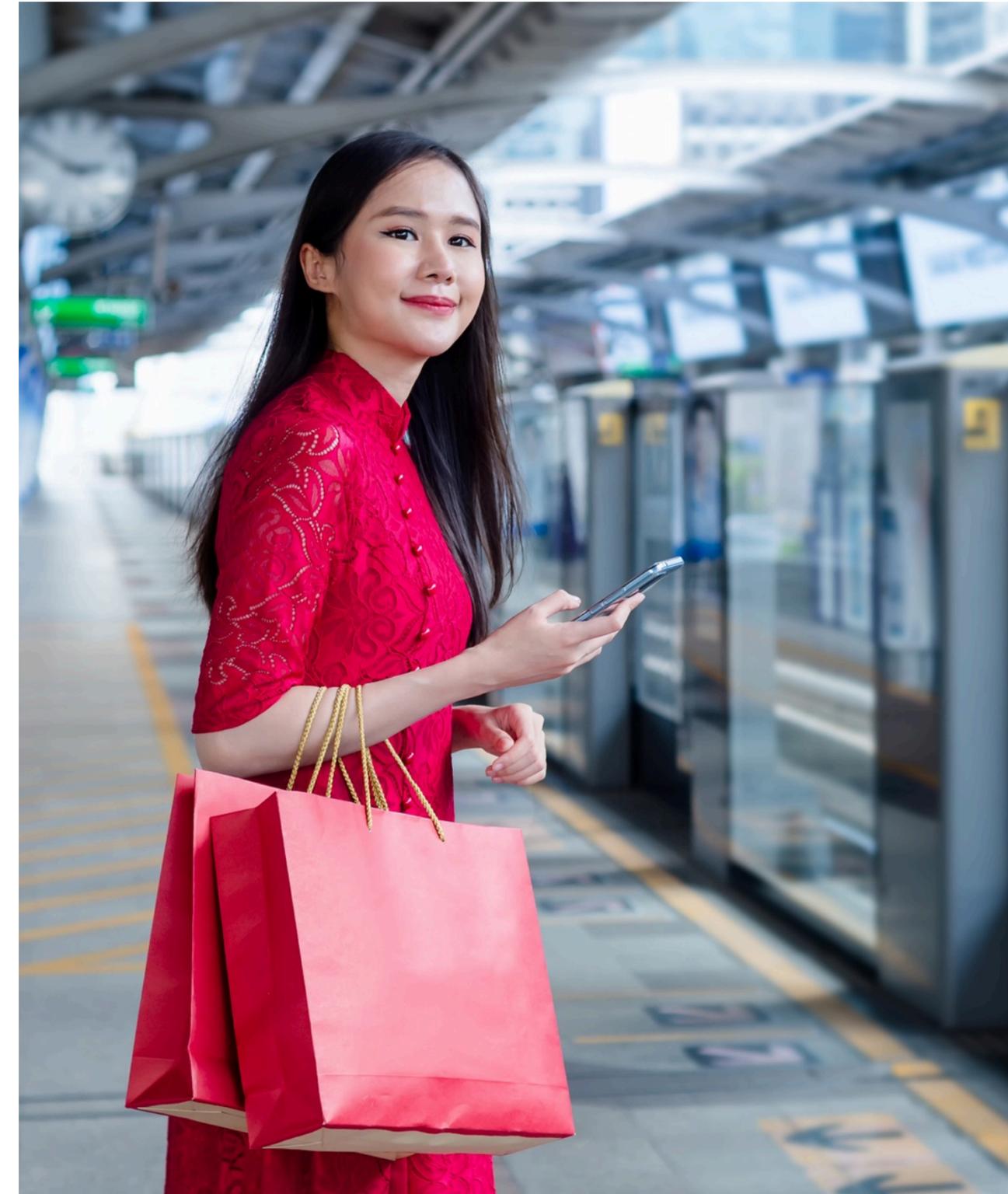
"To treat social commerce in Southeast Asia and India as a single channel is to misunderstand the region entirely. It is far more than just a media placement. It is a cultural behavior that mirrors how our consumers actually live on their phones.

As we look across the map, we see two distinct rhythms emerging. In India, The ecosystem is defined by high-velocity discovery through vertical video on Instagram Reels and YouTube Shorts all anchored by the massive reach of Facebook, along with the rapid evolving conversational commerce through all messaging apps. As we move into Southeast Asia, That energy shifts into a dynamic mix of shoppertainment on TikTok and community building on Facebook Live. Thailand even demands its own unique strategy deep within the chat ecosystems of LINE.

There is, however, a golden thread tying these fragmented markets together. That thread is trust. Real success relies on partnering with creators who sound like the customer and mapping those conversion points to the region's intense cultural calendar. We need to be present from the festive peaks of Diwali right through to the high-volume cycles of Ramadan and the mega sale dates.

When brands can underpin this organic energy with well targeted paid media, They are doing more than just buying views. They are amplifying high-intent conversations and turning the region's attention into measurable brand love."

Nathalie Pellegrini
Head of Client Growth

WPP Media

your playbook navigation guide

This guide provides a structured path through the social commerce landscape in Southeast Asia and India, covering everything from foundational understanding to advanced implementation strategies.

START WITH THE FOUNDATION

What is Social Commerce

Market Opportunity

Commerce Shift

Social Commerce Loop

UNDERSTAND THE LANDSCAPE

The Connected Ecosystem

Key Terms

Platform Powerhouses

Content That Converts

KNOW PLANNING AND OPERATIONS

Getting Started

Content Calendar

Regional Tactics

Technology & Operations

DEFINE IMPLEMENTATION

Maturity Journey

Social Commerce Plan on a Page

Ready to Win

what this playbook provides

Foundational Resource

This playbook is your starting point for social commerce in Southeast Asia and India and provides an overview of the regional landscape.

Market Insights

Current market data and differences to inform your platform and investment decisions.

Strategic Framework

It offers flexible foundational guidance designed to establish a framework for businesses and marketers.

"My time in Southeast Asia reveals one clear truth: consumers here move incredibly fast. Shopping is mobile, social, and instant. Many brands hesitate, waiting for 'proof of concept.' But in this region, speed is the strategy. If you wait for the perfect plan, the trend will already be gone. The brands that win test small and learn fast.

We also tend to underestimate the little guys like the nano and micro creators. these are the people driving genuine sales because they speak with honesty & authenticity. They show how a product actually helps them, instead of repeating the story a brand wants to tell. We also don't need complex funnels. We need content that leads straight to a purchase - And often a simple mobile video showing pain point → solution → proof → action is better at triggering purchase.

Whether it's TikTok, Instagram, or Shopee, the secret isn't mastering the algorithm. It's about showing up with simple content, making payment easy, and learning as you go.

My advice: be present, not perfect."

Jennifer Marquet-Béraud
Head of Commerce, SEA & Pakistan

WPP**Media**

part one: start with the foundation

- what is social commerce
- market opportunity
- commerce shift
- social commerce loop

what is social commerce?

Social commerce is when people discover and buy products directly within social media apps, without leaving to visit separate websites.

Instead of searching for products on shopping websites, customers find products while scrolling through social feeds.

Think of it like seeing a product in an Instagram post and buying it with one tap, or watching a TikTok live video where someone demonstrates makeup and purchasing it immediately.

Customers spend hours on social media daily, so meeting them where they already are makes shopping more convenient.

the ~$116b growth opportunity

Southeast Asia and India are among the world's fastest-growing markets for content-led and social commerce, driven by mobile-first buying and trusted creator- and video-led discovery.

~$46B
SEA Video Commerce GMV in 2025

~$70B
India Social Commerce GMV by 2030

Note: SEA video commerce GMV derived from video commerce share of ecommerce GMV, based on Google, Temasek, and Bain & Company, e-Conomy SEA 2025. India social commerce GMV based on projections from Bain & Company and Sequoia Capital India, The Future of Commerce in India by 2030.

the great commerce shift

Consumers are abandoning destination commerce for discovery commerce, an evolution in how purchases happen.

OLD COMMERCE
Search → Product Page → Checkout
Linear, friction-heavy journey

NEW COMMERCE
Scroll → Inspiration → Buy Now
Social, seamless, instant

"When I look at Southeast Asia and India, I don't just see a market adopting social commerce. I see the epicenter of a revolution. Our consumers are the ones driving this global evolution and creating the very blueprint that Western markets are now trying to replicate.

In this region the traditional funnel has been replaced by a continuous loop of entertainment and trust. Success comes down to radical localisation. It is the vertical video dominance in India or the intense chat commerce on LINE in Thailand and TikTok Shop in the rest of SEA. We win by respecting these local nuances and embracing vernacular creators and live interactions.

This region's agility is shaping the future of digital commerce worldwide and it is incredibly exciting to have a front row seat."
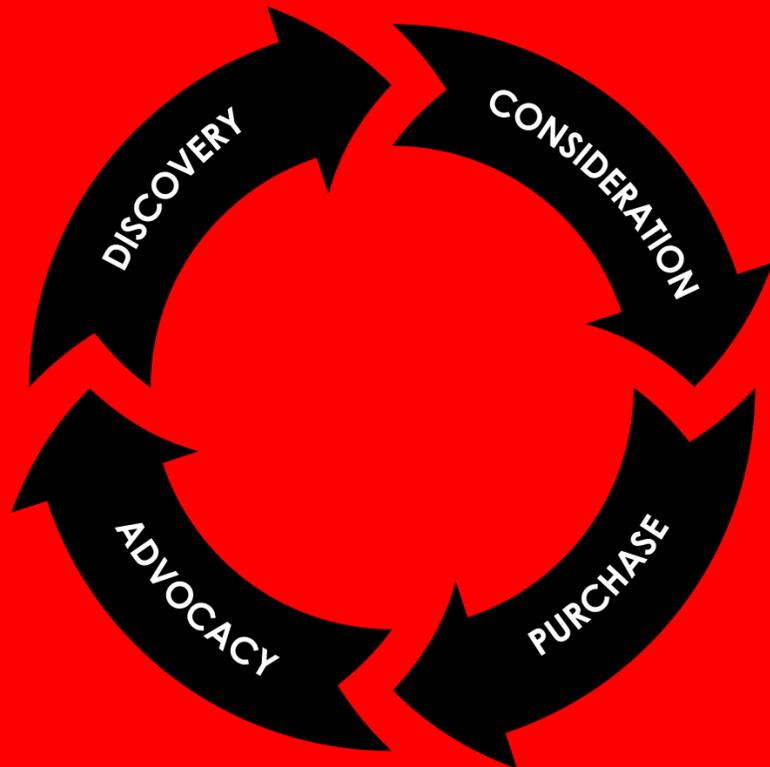
Alice Isola
Head of Social, APMEA

WPP **Media**

the social commerce loop

Social commerce isn't just shopping on social platforms. It's a complete ecosystem where discovery, consideration, purchase, and advocacy all happen within the social experience.

Live video shopping on TikTok (Vietnam), Meesho affiliate posts (India)

DISCOVERY

CONSIDERATION

Shopee reviews (Thailand), WhatsApp buying through messaging apps (India)

Instagram user-generated content (posts by real customers) (Singapore), ShareChat product reviews

ADVOCACY

PURCHASE

Lazada buying without leaving the social app (Philippines), Flipkart buying without leaving the social app

"Social commerce is more than shopping on platforms; it's an ecosystem where discovery, consideration, purchase, and advocacy play out in one continuous social experience. My interest in padel, for example, led me from YouTube tutorials to buying an Adidas racket directly from the Creators link, which I then shared socially within my padel community. this fluid journey shows how seamless social commerce is for today's consumers."

Rushit Jhaveri
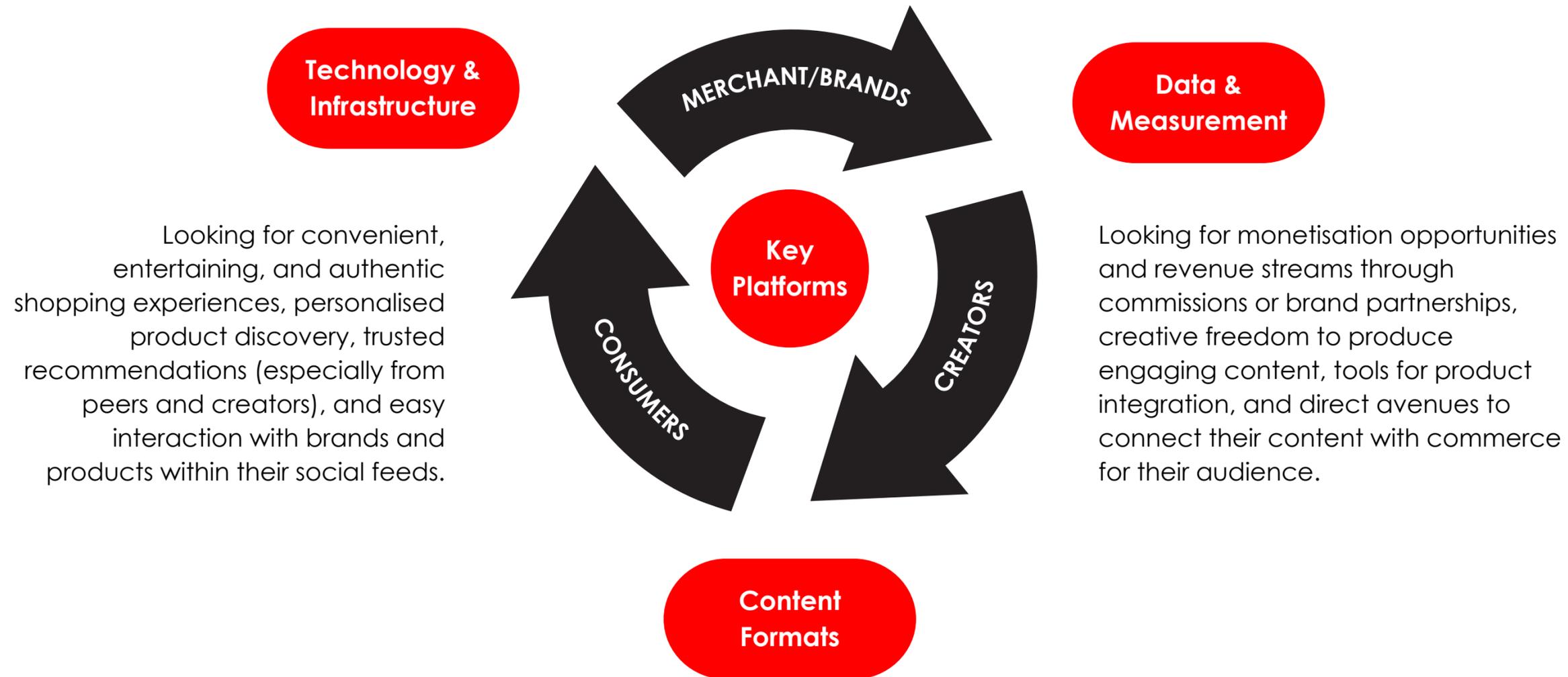Head, Content Solutions & Sponsorship SEA (YouTube)
Google

part two: understand the landscape

- the connected ecosystem
- key terms
- platform powerhouses
- content that converts

the connected ecosystem

Looking for direct sales and measurable ROI, expanded reach to target audiences, seamless in-app purchase paths, authentic customer engagement, and access to creator content that drives conversions.

Technology & Infrastructure

Data & Measurement

MERCHANT/BRANDS

Key Platforms

CONSUMERS

CREATORS

Looking for convenient, entertaining, and authentic shopping experiences, personalised product discovery, trusted recommendations (especially from peers and creators), and easy interaction with brands and products within their social feeds.

Looking for monetisation opportunities and revenue streams through commissions or brand partnerships, creative freedom to produce engaging content, tools for product integration, and direct avenues to connect their content with commerce for their audience.

Content Formats

ten key terms every marketer should know

	Gross Merchandise Value (GMV)	Average Order Value (AOV)	Conversion Rate (CR)	Engagement Rate	Return on Ad Spend (ROAS)
What it is:	The total value of goods sold via your social commerce channels in a given period, before fees, returns, or discounts.	The average amount spent per order.	The percentage of users who make a purchase after engaging with your social content or store.	The percentage of your audience interacting with your content (likes, comments, shares, saves).	Revenue generated for every dollar spent on social ads or influencer campaigns.
Why it matters:	It's the north star metric for overall sales volume and growth in social commerce.	Helps identify upsell, cross-sell, and bundling opportunities to increase revenue without more traffic.	Shows how effectively you turn attention into transactions.	High engagement often signals stronger purchase intent and community trust.	Essential for understanding paid campaign profitability.

	Cost Per Acquisition (CPA)	User-Generated Content (UGC)	Commission Rate	Product Tag Clicks (or Product Detail Views)	Cart Abandonment Rate
What it is:	The cost to acquire a paying customer through social channels.	Content created by customers or fans that brands can use in marketing such as reviews, photos, videos.	The percentage paid to influencers, affiliates, or creators for each sale they drive.	The number of clicks on tagged products in posts, stories, or live streams.	The percentage of shoppers who add products via social commerce but don't complete checkout.
Why it matters:	Critical for knowing if your acquisition strategy is sustainable.	Builds authenticity and trust, often outperforming branded content in conversions.	Key for managing creator partnerships and ensuring fair, profitable payouts.	A platform-native metric that shows direct shopping interest from content.	Highlights friction points in the purchase journey and opportunities to recover lost sales.

DOWNLOAD THE FULL SOCIAL COMMERCE GLOSSARY

"I've been in this industry long enough to know that social commerce isn't won by counting clicks, chasing views, or bragging about impressions. It's not just selling on social, it's about weaving discovery, desire, and purchase straight into the everyday conversations people are already having.

In Southeast Asia and India, social commerce is more mature and moves differently compared to Europe or North America. I see it every day: seamless integration between platforms and consumer habits turns a laugh over a reel into a product search, a comment into a checkout, and "just browsing" into "order confIrmed."

The magic happens when influencer collaborations feel genuine, when content truly earns engagement, and when campaigns hit the perfect cultural and contextual note , that's when GMV climbs, AOV grows, and conversion rates start looking like victory laps. Platforms today make it effortless to turn a thumb-stopping moment into a sale, a product tag click into a checkout, and a simple like into a loyal customer."

Arthur Altounian
VP WPP Media Influence, Singapore & Malaysia

WPP Media

key platforms

Choosing the right platform is vital for social commerce success. This consolidated table provides a concise overview of key platforms, categorised them by their primary focus and highlighting the unique commerce capabilities and regional strengths.

Platform Group	Category	SEA	India	Key Social Commerce Features
Meta (Instagram, Facebook)	Social Media	✓	✓	Facebook Affiliate Partnerships, Collaborative Ads in Facebook Live, Instagram Creator Marketplace, Partnership Ads, Reels Ads, Click-to-Message Ads and Shops Ads
TikTok	Social Media	✓		In-app Purchasing (TikTok Shop), Live Stream Selling, Creator Marketing
YouTube	Social Media	✓	✓	YouTube Shopping, Live Shopping Events, Creator Monetisation
SEA Retail Media (Shopee, Lazada, Tokopedia, Zalora)	Retail Media	✓		In-app Checkout, Live Selling, Gamification, Community Features, Reviews
India Retail Media (Meesho, Flipkart, Amazon)	Retail Media		✓	Affiliate Marketing, Reselling, Community Buying, Affordable Products
Conversational Commerce (WhatsApp, Messenger, Instagram Direct, LINE)	Messaging	✓	✓	Future Potential: Direct Commerce, Customer Service, Payments

Links to the Meta, Google and TikTok Partners for further insights into the Platform Landscape and Tools

content formats

Choosing the right content format can make or break your social commerce strategy. Different formats drive different outcomes across markets.

LIVE COMMERCE
Real-time selling during livestreams

Product demonstrations with live Q&A convert viewers into buyers during the stream itself.

Partners:
- TikTok Shop (SEA)
- Flipkart Live (India)
- Facebook Live Shopping (SEA, via partner marketplaces)

UGC & AFFILIATE MARKETING
Creator-driven product discovery

Trusted recommendations connect products with engaged audiences already following the creator.

Partners:
- YouTube Shopping Affiliates (SEA & India)
- TikTok Shop Creator Affiliates (SEA)

CONVERSATIONAL COMMERCE
Personalised shopping via direct messaging

1:1 conversations for personalised recommendations and instant answers, creating direct paths from inquiry to purchase.

Partners:
- WhatsApp Business (SEA & India)
- LINE Official Accounts (Thailand)

"I've bought everything from electronics to groceries online, and honestly, the way something is shown makes all the difference. Few days ago, a simple product photo couldn't convince me to buy a mixer-grinder, but watching someone actually use it in a live demo? that sealed the deal."

Vaibhav Pandey
Co-founder & CTO

tyroo

content format case studies

live commerce | ugc & affiliate marketing | conversational commerce

live video ads with facebook messenger cta convert viewers mid-stream

Meta's client Hương Hồ Store, a health and beauty retailer in Vietnam, generated strong live video viewership but conversions happened after streams ended.

STRATEGY:

Hương Hồ Store launched a campaign of ads that click to Messenger using live boosting for its livestream sessions. Live videos were delivered as video ads with a "Send message" button, encouraging viewers to reach out in real time.

RESULTS:

- 11× more purchases
- 16× higher ROAS
- 2× more leads

creator "yogurt bartenders" sell an unlikely e-commerce category

WPP Media's client Vinamilk in Vietnam faced a category challenge; spoonable and drinkable yogurt has cold chain logistics, short shelf life, and no clear signal driving online purchase.

STRATEGY:

WPP Media focused on selling the experience of enjoying yogurt, not the product itself. Creators became "yogurt bartenders" during TikTok Shop live sessions, demonstrating drinks and recipes using Vinamilk products. Viewers watching wanted to recreate what they saw, and could purchase immediately during the stream.

RESULTS:

- #1 ranking in category sales
- Significant affiliate GMV growth
- Store's first-ever sales record

parenting-focused livestreams lift infant nutrition sales

LIVE COMMERCE

The infant nutrition market in Vietnam gradually became quiet as parents lost deep connection with brands. WPP Media's client NAN Nutrition faced a competitive digital landscape where key players in all categories were growing aggressively through new initiatives

STRATEGY:

WPP Media centred the campaign on the emotional power of music and parental love. A branded music album and content creator challenge on YouTube reconnected with parents, supported by livestreams on Lazada to accelerate marketplace sales.

RESULTS:
- #1 ranked across SEA
- 106% GMV growth
- 168% order uplift
- 57% total RSBD GMV
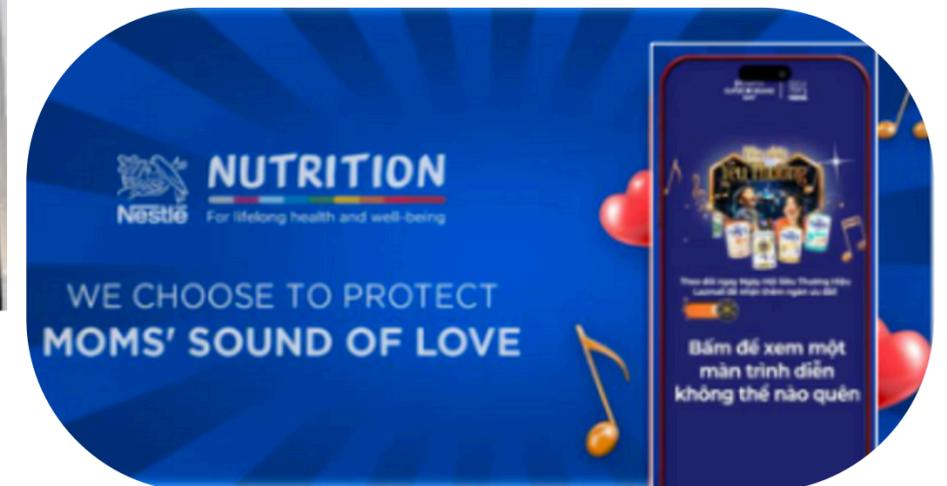
affiliate videos drive conversions, creator videos drive awareness on tiktok shop

TikTok's client Nivea Thailand needed to drive more traffic, improve upper-funnel efficiency, and optimise for conversions with videos.

STRATEGY:

Nivea ran pilot tests across mega sales campaigns and always-on periods with two content approaches: product-focused short-form videos under 30 seconds through affiliates, and storyline-driven long-form videos over one minute through creators. Both ran with Live and TikTok Shop Ads.

RESULTS:

- 12.1 ROAS (highest VSA ROAS during campaign)
- +557% growth in product impressions
- +43% growth in total GMV
- All affiliate and creator content outperformed market category benchmarks

top-performing organic creator videos become paid ads on tikok shop

TikTok's client Nature's Own, a Malaysian healthier instant food and beverage brand, wanted to expand reach and maximise sales on TikTok but lacked creative resources for sustained paid campaigns.

STRATEGY:

Working with a digital marketing agency, Nature's Own used TikTok's Affiliate Creatives for Ads (ACA) to scale top-performing organic content into paid campaigns. Affiliates included product links in their content, giving the brand an expanded ad inventory of authentic, user-generated videos. The trust affiliates had built with their audiences carried into the paid placements.

RESULTS:

- +311% uplift on GMV
- +436% uplift on orders
- 2.5× ROI

creator content in partnership ads increases furniture sales on facebook and instagram reels

Furniture retailer Castlery in Singapore wanted to understand how creator content performed against brand-produced campaigns. Working with Meta, Castlery tested Partnership Ads featuring creator content in Facebook and Instagram Reels.

STRATEGY:

Castlery measured creator-led Partnership Ads directly against the brand's usual marketing campaigns, running both simultaneously to compare performance.

RESULTS:

- 78% lower cost per purchase
- 47% lower cost per add to cart
- 4× higher ROAS
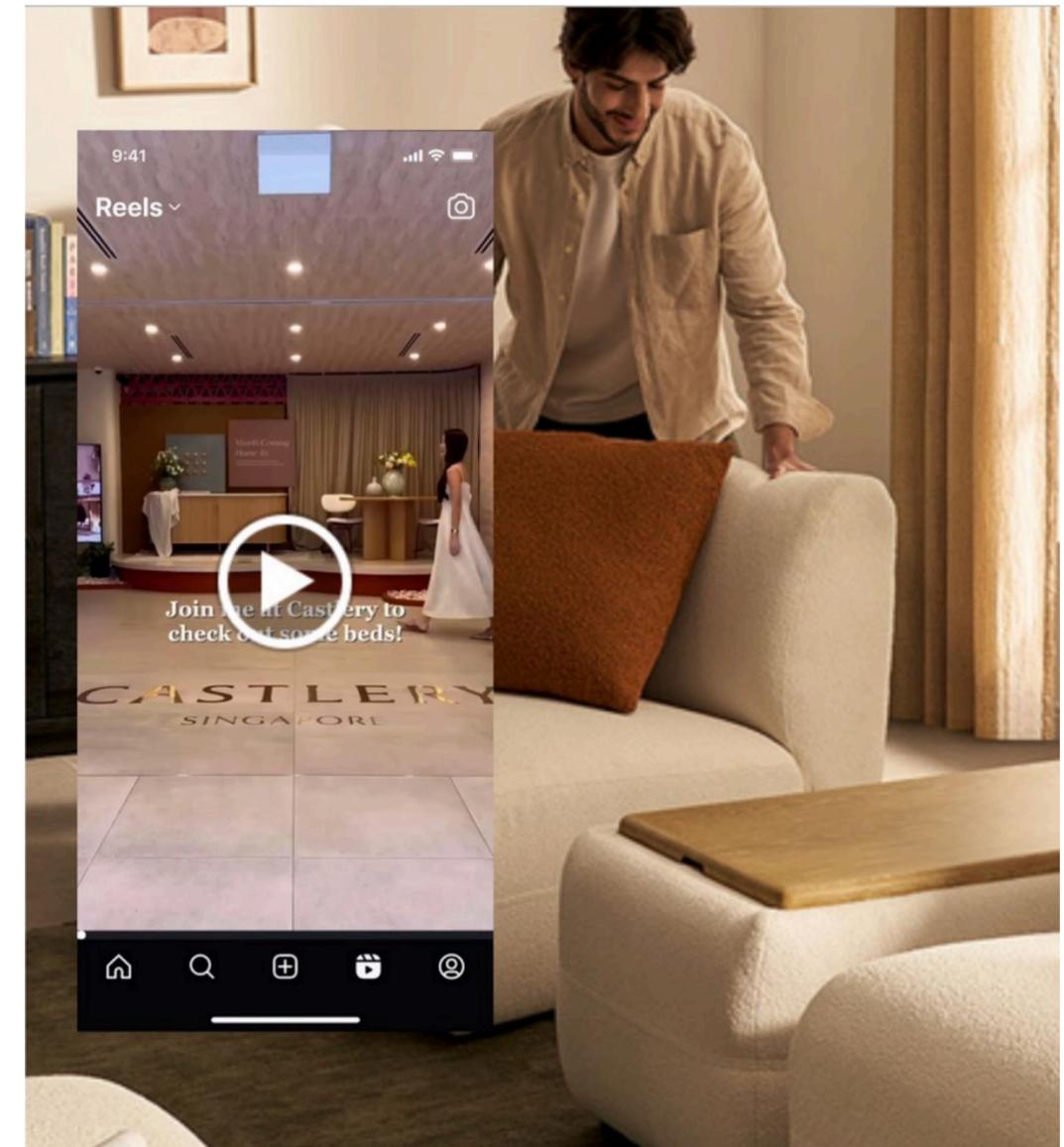
automated instagram dm responses route high-intent shoppers to skincare consultations

Skincare brand Kiehl's in Malaysia had strong Instagram engagement but manual responses to direct messages couldn't scale. They needed to convert social engagement into consultation bookings without losing the personalised experience premium skincare requires.

STRATEGY:

Kiehl's integrated Meta's Messenger API for Instagram with a conversational commerce partner. The automated assistant answered product questions, identified purchase intent, and booked consultations directly within the Instagram DM thread. Human consultants received only qualified leads ready for personalised advice.

RESULTS:

- 30% more qualified leads compared to other channels
- 20% conversion rate from consultation to sales
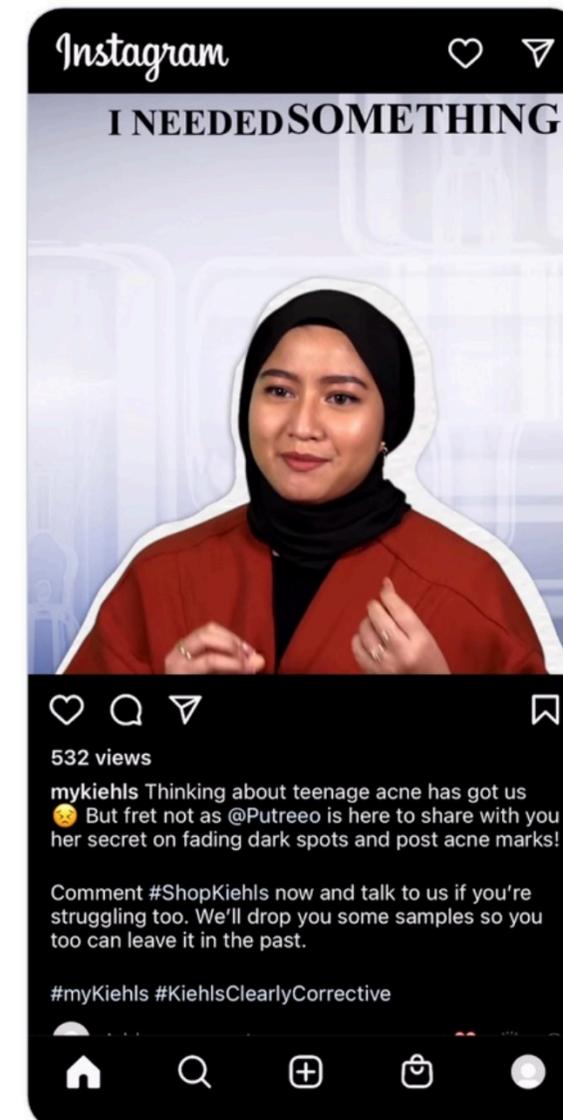
whatsapp business platform turns insurance enquiries into completed purchases

Meta's client PolicyBazaar, India's largest insurance marketplace, found email and SMS too one-sided for a considered purchase category. Customers had questions before buying insurance, and one-way channels couldn't answer them.

STRATEGY:
PolicyBazaar deployed Meta's WhatsApp Business Platform as a commerce channel. Automated responses handled common questions, personalised promotions reached customers based on their browsing behaviour, and in-thread payments allowed customers to complete purchases without leaving the conversation.

RESULTS:
- 5× increase in insurance premiums collected
- 5× increase in click-through rates
- 5× increase in sales
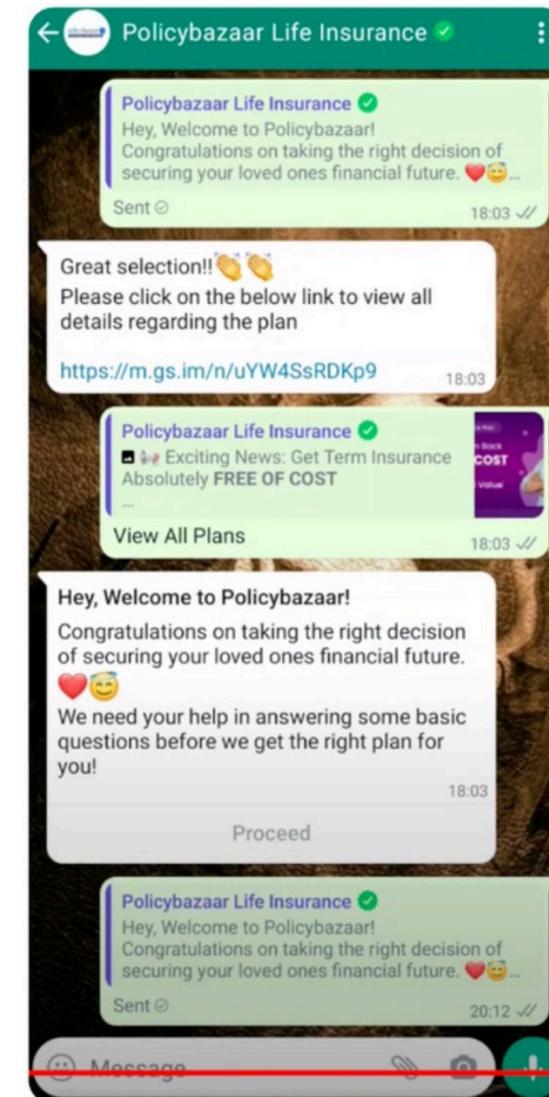
whatsapp campaigns and marketing messages grow sales and engagement for pizza delivery

Pizza delivery brand Domino's Indonesia needed to convert new customers to loyal patrons, enhance order values, and improve customer engagement, all while driving more traffic to its app.

STRATEGY:

Domino's shifted attention from email and push notifications to Meta's WhatsApp Business Platform, sending regular campaigns and personalised offers via marketing messages. A QR-code "scan and win" loyalty programme in WhatsApp rewarded repeat purchases.

RESULTS:

- 72% increase in sales attributed to WhatsApp
- 6.3× ROI from marketing messages

# seven regional languages on whatsapp reach insurance customers across india

Life insurance provider Max Life Insurance in India had customer services on Meta's WhatsApp Business Platform, but these were only available in English. Customer groups wanted to access support services but faced a language barrier.

STRATEGY:

Max Life teamed up with a technology partner to use WhatsApp Business Platform's supported languages feature, designing more than 10 common customer experiences in seven of India's most common regional languages based on customer preference. These experiences account for 80% of Max Life's customer service traffic on WhatsApp. A two-tap journey at conversation start lets customers select their preferred language.

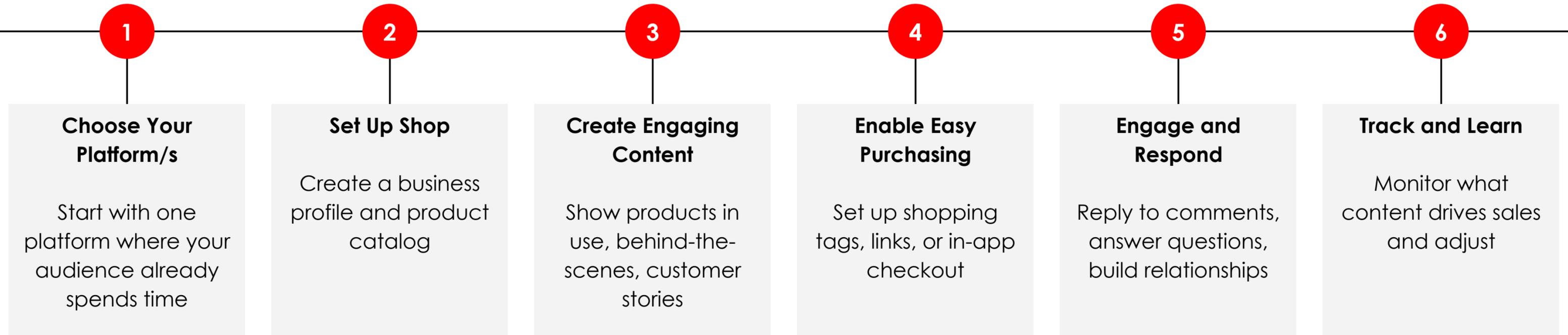**RESULTS:**

- 7 regional languages enabled
- 4 in 10 customers completed experiences in their preferred language
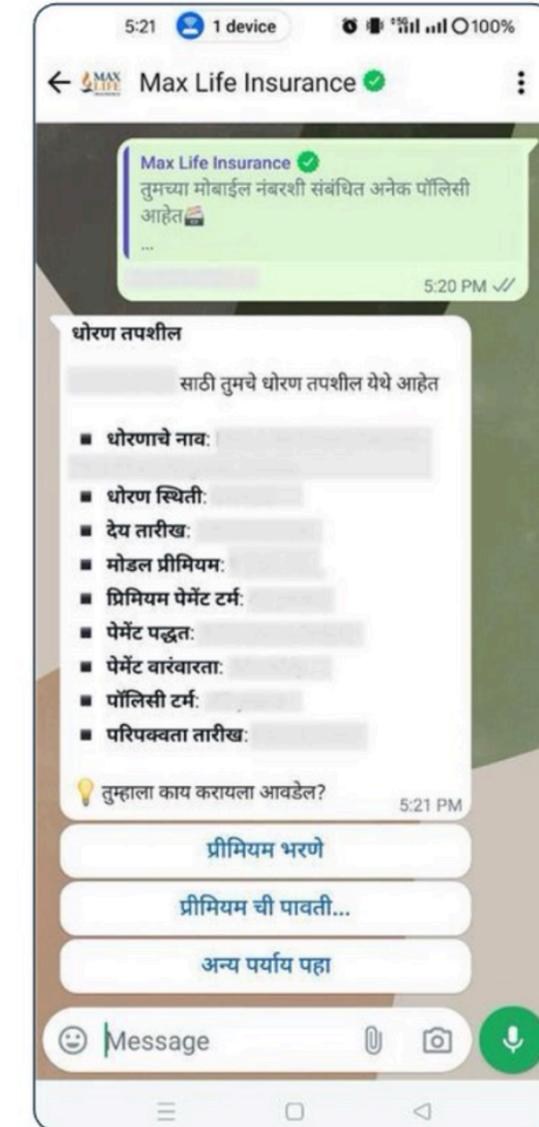
part three: know planning & operations

- getting started
- content pillars & calendar
- regional tactics
- technology & operations

getting started: the first steps

1

Choose Your Platform/s

Start with one platform where your audience already spends time

2

Set Up Shop

Create a business profile and product catalog

3

Create Engaging Content

Show products in use, behind-the-scenes, customer stories

4

Enable Easy Purchasing

Set up shopping tags, links, or in-app checkout

5

Engage and Respond

Reply to comments, answer questions, build relationships

6

Track and Learn

Monitor what content drives sales and adjust

common beginner mistakes to avoid

- Posting only product photos without context
- Focusing on follower count instead of engagement
- Ignoring customer comments and questions
- Not optimising for mobile viewing

getting started case studies

create engaging content | enable easy purchasing

# video content and dynamic product ads increase ctr for protein brand

Plant-based protein brand Origin Nutrition in India faced multiple challenges on Meta: static product images failed to capture attention in crowded feeds, low thumb-stop rates led to poor ad engagement, high customer acquisition costs ate into margins, and retargeting campaigns underperformed.

STRATEGY:

Working with Meta and Tyroo, Origin Nutrition turned static product images into video ads featuring ingredient close-ups, texture shots, and blend animations optimised for 9-15 second formats. Dynamic Product Ads highlighted key differentiators like "25g Protein" and "No Sugar" with benefit tags, flavour labels, and pricing.

RESULTS:

- +185% CTR uplift
- +47% CTR uplift on retargeting
- 4× ROAS
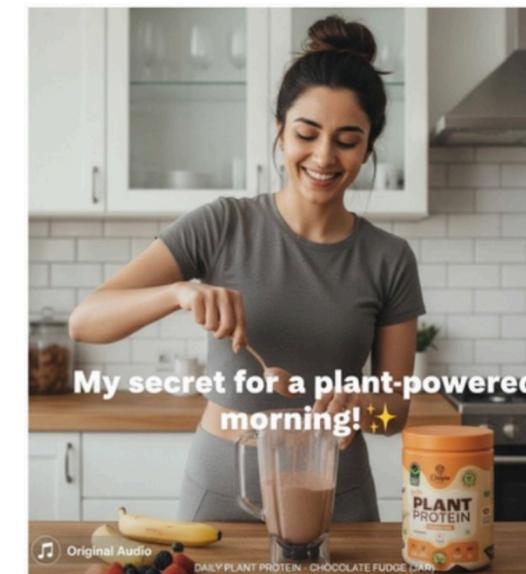
# catalog ad campaigns increase performance for brands

Brands advertising on Meta's client Shopee across Indonesia, Vietnam, and Thailand wanted to improve catalog ad campaign performance beyond what carousel format alone could deliver.

STRATEGY:

Shopee ran Meta Advantage+ catalog ad campaigns featuring mixed ad formats for brand advertisers Changhong and LG Electronics. The campaigns combined carousel with video and other formats, testing whether format variety could improve results across different markets and product categories.

RESULTS:

- 24% higher ROAS (Changhong, Indonesia)
- 31% lower cost per order (LG Electronics, Vietnam)
- 26% higher ROAS (LG Electronics, Thailand)
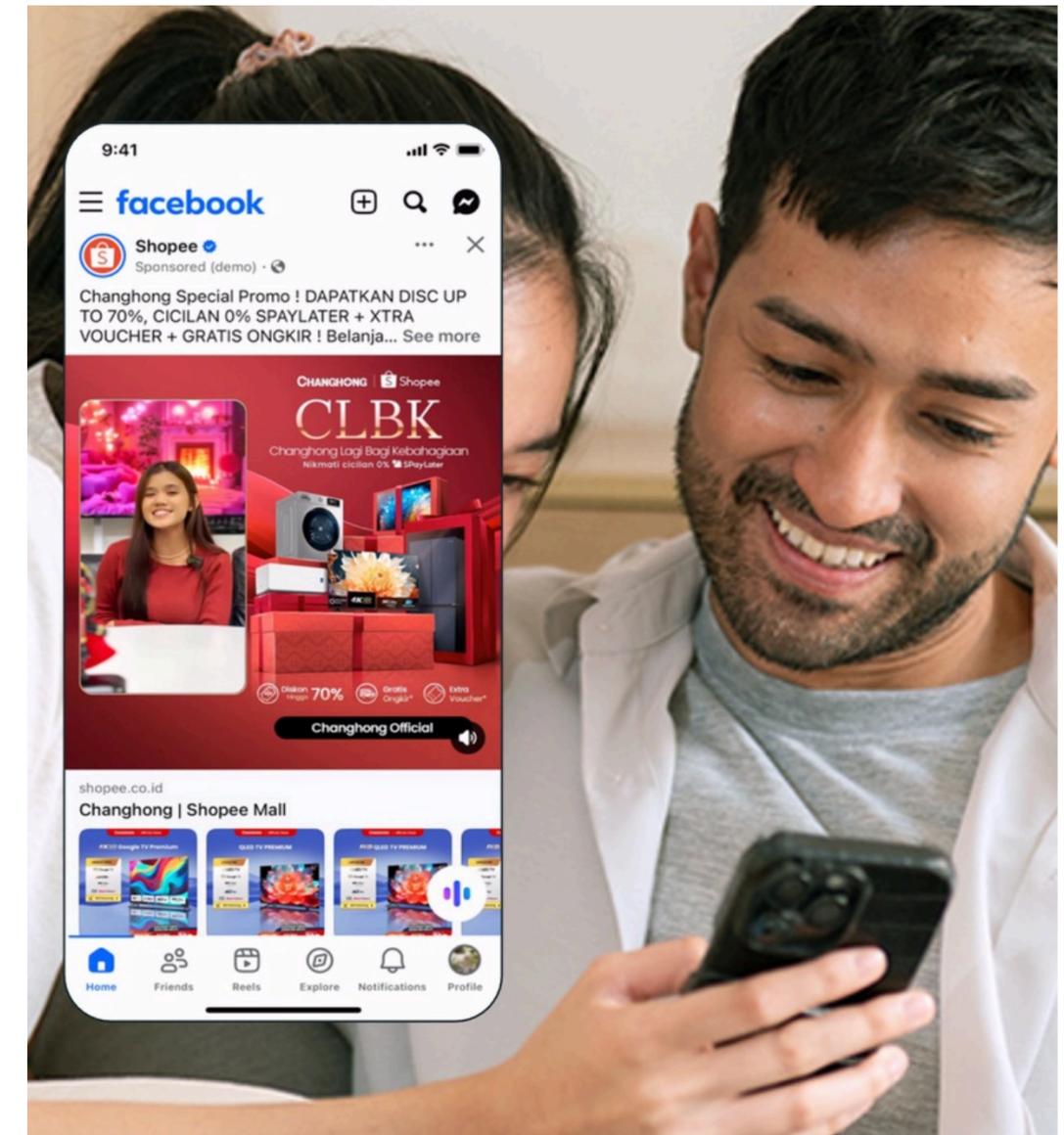
enriched product feeds increase instagram shopping performance for innerwear

Innerwear brand XYXX in India had a product catalogue not created for social discovery. Missing fabric details, inconsistent sizing information, and poor visual merchandising resulted in low engagement and limited discoverability on Instagram in a crowded category where impulse purchases are key.

STRATEGY:

Collaborating with Meta and Tyroo, XYXX enriched product feeds with lifestyle-focused attributes including comfort indicators, style tags, and occasion mapping, all optimised for Instagram shopping behaviour with real-time inventory sync. Shoppable creative featured dynamic product cards with lifestyle imagery, social proof elements, comfort highlights, and checkout CTAs designed for native social commerce.

RESULTS:
- +40% quality score
- +170% CTR
- 3.4× ROAS

four key content pillars

Strategic content planning is paramount for transforming social commerce into a powerful engine for engagement and conversions.

HOLIDAYS & CULTURAL MOMENTS

Leverage key celebration days and significant cultural events to forge deeper emotional connections with your audience. These moments provide unique opportunities for thematic content, special promotions, and storytelling that resonate with Seasonal purchasing behaviour and local traditions in your target markets.

COMMERCE DAYS & SALES EVENTS

Capitalise on established global and regional sales events such as 6.6, 9.9, 11.11, and Black Friday. These days are deeply ingrained in shopping culture worldwide, offering peak traffic and sales potential for timely, exclusive promotions and irresistible deals designed to maximise conversions.

NEW SHOP LAUNCH & MILESTONES

Showcase your shop's journey and evolution through strategic milestones, from its foundational launch to significant growth phases. This pillar is crucial for building anticipation, establishing your brand identity, engaging early adopters, and creating sustained momentum with your audience.

BRAND MOMENTS & PROMOTIONS

Highlight specific product launches, ongoing promotions, and brand celebrations that directly align with your unique value proposition and overarching business objectives. This content strengthens community, reinforces brand loyalty, and communicates the distinctive benefits to set your brand apart in the market.

"In SEA and India, shopping on 9.9, Diwali or 11.11 became a countdown on mobile. Daily video teasers, creators' drops, hi-energy Live Streams and WhatsApp reminders build up the rush; one-click checkout, Super-apps' e-wallet payment or COD (Cash On Delivery) makes the last tap easy.

Commerce Days are not just sales, they are "Shoppertainment": authentic, relevant, content-led experiences where the discovery, the adrenaline-fed anticipation, the deal-hunt, the reviews and the endorsements drive impact far before the last click."

Julien Carsenti
Regional Client Partner

∞ Meta

content calendar

When building a content calendar, success lies in aligning with moments that resonate deeply with both your brand identity and customer behaviour patterns.

Q1 (JAN-MAR): KEY DATES
- New Year promotions, goal-setting content
- Valentine's Day campaigns (beauty, fashion, gifts)
- Spring collections, fresh starts
- Women's Day campaigns, early summer prep

Q2 (APR-JUN): KEY DATES
- Easter/Spring festivals, Seasonal transitions
- Mother's Day campaigns, family-focused content
- Summer launches, vacation-ready products
- Mid-year reviews, summer sales

Q3 (JUL-SEP): KEY DATES
- Summer peak, back-to-school prep
- Independence Day sales (India), National Day (SEA)
- Festival Season prep (Ganesh, Ghost Month)
- Q4 planning and inventory prep

Q4 (OCT-DEC): KEY DATES
- Diwali campaigns (India), Halloween (global)
- 11.11 mega sales, Black Friday prep
- 12.12 campaigns, Christmas shopping
- Year-end clearance, New Year prep

"Creators are no longer just storytellers or content makers; they're now business partners delivering sale values through 'creator-led shoppertainment'. this new profession is the new economy engine for Social Commerce in SEA+IN."

Krirk Sathirawongwan
Head of Precision & Performance
WPP Media

technology and infrastructure excellence

Behind every successful social commerce experience is robust technology infrastructure. Build systematically from must-haves to advanced capabilities.

MUST HAVE FOUNDATION

PAYMENTS
Frictionless buying without leaving the social app, with local payment methods

LOGISTICS
Reliable delivery with real-time tracking

CRM
Basic customer data capture and segmentation

ANALYTICS
Core performance indicators and tracking the percentage of viewers who buy

ADVANCED CAPABILITIES

SMART PAYMENTS
Buy now, pay later options, mobile wallets, currency flexibility

QUICK COMMERCE
Small local warehouses for faster delivery, same-day delivery

AI PERSONALISATION
Dynamic recommendations and content curation

ATTRIBUTION
Tracking which marketing efforts lead to sales across different platforms and return on investment modeling

part four: define implementation

- maturity journey
- social commerce plan on a page
- ready to win

social commerce maturity journey: platform

Businesses need to understand if the retail platforms they want to invest into meet certain criteria in terms of scale and maturity. The following aims to provide general guidance to brands to help scope out potential of partners.

To scope out partners, look at two dimensions:
1. The total platform usage - Sizing
2. The platform offering to brands - Offering

For sizing, consider the following:
- Monthly Active Users (MAU)
- Engagement
- Downloads, and
- Growth rate

For offering, look into:
- Availability of APIs
- In and out platform audience sizing/identification
- Shop in shop build capability
- Offer on platform conversion capability

social commerce maturity journey: brand

Brands and marketers assess themselves across the social commerce maturity framework to identify opportunities and pin down a development roadmap.

CRAWL

Crawl (0-6 months)
Social page creation - own brand/marketplaces

Social posting organic calendar management

Advertising ($1k-$2k per month)

WALK

Walk (6-12 months)
Creation of social commerce shop frontend - own brand website & marketplaces

Creator engagement twined with paid media support

Live streaming trials

Advertising ($2k-$5k per month)

RUN

Run (12-24 months)
Social commerce shop optimised on experience based on audiences and SKU offering

Data, reporting API pipeline set up for automated workflows

Live streaming Always on

Advertising ($5k-$15k per month)

FLY

Fly (24+ months)
Shop connected to first party data CRM stack and loyalty journey

Setup of data clean room to merge multi data points for advanced analytics studies

Advertising (>$20k per month)

*Benchmarks vary by platform, audience maturity, and local market conditions.
Use as directional guidance, not absolute targets. Excludes Creator and Affiliate Commission.

"Social commerce is like cooking a five-course meal: you must plan ingredients in advance, pay attention to preparation times, and keep testing the process as it progresses. As solutions mature within our region, it is becoming more and more of a science, with proven recipes that drive outcomes. Approach it in three steps:

- Crawl removes chat and payment friction.
- Walk removes platform friction by syncing catalogues and offers across Meta, TikTok Shop, Shopee, Lazada, and Flipkart.
- Run removes data and operations friction; live ops, stock, vouchers, and COD/RTO under control.
- Fly removes growth friction by linking shop data to CRM and privacy-safe clean rooms, so every Commerce Day finds the right people at the right time.

Brands must keep their eyes and ears open to understand what consumer communities want and thrive on."

Guillaume Legond
Head of eCommerce
dentsu

social commerce plan on a page

	DISCOVERY	CONSIDERATION	PURCHASE	ADVOCACY
Commerce Role	Trigger demand	Capture demand	Convert demand	Retain demand
Platform & Channel	SEA+IN: Instagram, Facebook, YouTube, Pinterest SEA: TikTok TH: LINE	SEA+IN: Instagram, Facebook, YouTube, Pinterest SEA: TikTok SG+IN: Reddit	SEA+IN: YouTube Shopping, Amazon SEA: Shopee, Lazada, TikTok Shop, Facebook Live Shopping (Via Marketplace Partners), Facebook Messenger, Instagram Direct, Whatsapp IN: Flipkart/Shopsy, Meesho, Myntra TH: LINE Shopping ID: Tokopedia	SEA+IN: Facebook, Instagram, YouTube, Whatsapp, Lazada, Shopee SEA: TikTok IN: Amazon
Shopping Tactics	Organic & Paid media Live Commerce Assortment Strategy	Organic & Paid media Live Commerce Assortment Strategy Conversational Commerce	Paid Media (Especially Shoppable Media) Live Commerce Conversational Commerce Affiliate Link Promotional Activity Assortment Strategy (e.g.. Bundle)	Organic & Paid Media Community Salesperson/Spokesperson Conversational Commerce Affiliate Marketing Loyalty Program/Membership Collaboration/Exclusive Giveaways
Content	Content Creator/UGC Inspiring content by Brands Shoppertainment	Content Creator/UGC Educational Content By Brands Edutainment	Promotional Content by Brands Affiliate Content by Creators Commerce Days & Sales Events	A peer recommendation by Community and Brand Advocate Community & Product Reviews Testimonial/Endorsement
Format	Live Video Instagram Reels & Stories, TikTok Video YouTube Shorts Social Posts Keywords/Trend/Hashtag (e.g. #lifehack)	Live Video Instagram Reels & Stories TikTok Video YouTube Shorts Social Posts	Collaborative ads (CPAS) Catalog Ads, Collection Ads, Video Ads Live Streaming, Live Video Messaging Ads, Chat-to-shop Voice Commerce	Live Video Instagram Reels & Stories TikTok Video YouTube Shorts Social Posts (including Social Engagement) Messages, Chat-To-Shop
Technology & Infrastructure	Social storefront Integration Retailer integration Shoppable Tag AR/VR Shopping AI-powered recommendation	Social storefront integration Retailer integration Shoppable tag Multi-Channel-Network (MCN) AR/VR Shopping AI-powered recommendation	Retailer integration/Social Integration In-App check-out Payment gateways Mobile wallet/e-wallet Store management/Stock management Customer order automation Logistics & fulfillment solution	CRM System Influencer Relationship Management (IRM) System MCN
KPI/Goal	Reach, Engagements, Views	Store Traffic, Product View	Conversion Rate, GMV, AOV, ROAS, ROI	Repurchase Rate, Number Of Reviews Share Of Voice (SOI/SOV)

ready to win in social commerce

The opportunity is massive, but success requires strategic thinking, local adaptation, and systematic execution.

STAY SMART

Choose platforms based on audience fit and how ready your business is for online selling, not just reach.

THINK LOCAL

Adapt tactics to regional behaviours whilst maintaining brand consistency.

BUILD SYSTEMATICALLY

Progress through different stages of readiness with technology and operations as foundations.

"In this region, social commerce has become a structural shift in how people make purchase decisions. Social platforms are now high-impact commerce environments where entertainment, community, and selling intersect. this new landscape is no longer limited to beauty and fashion but we are seeing expansion into FMCG, electronics, home living, driven by unique regional shopping behaviours. In Vietnam, creators drive purchase more than discounts; in Indonesia, community validation shapes discovery; and in Thailand, real-time live formats accelerate conversion.

To succeed, brands must move with agility: prioritising value over discounts, innovating with creators and SKU strategies, while staying closely attuned to the nuances of local communities, festivals and SEAsonal shopping moments."

Madelene Ortega
APAC Head of Global Agencies
TikTok

the iab sea+india social commerce council

The IAB SEA+India Social Commerce Council unites specialists from agencies, publishers, and platforms, bringing collective expertise spanning social analytics, attribution, performance, campaign effectiveness, and business intelligence. Through collaboration and consensus, the Council provides trusted industry guidance on social commerce strategies.

SOCIAL COMMERCE COUNCIL LEADS

Nathalie Pellegrini
Head of Client Growth

WPP Media

Madelene Ortega
APAC Head of Global Agencies

TikTok

Guillaume Legond
Head of eCommerce

dentsu

Rushit Jhaveri
Head, Content Solutions & Sponsorship SEA (YouTube)

Google

Alice Isola
Head of Social, APMEA

WPP Media

Arthur Altounian
VP WPP Media Influence, Singapore & Malaysia

WPP Media

Jennifer Marquet-Béraud
Head of Commerce, SEA & Pakistan

WPP Media

Krirk Sathirawongwan
Head of Precision & Performance

WPP Media

Julien Carsenti
Regional Client Partner

Meta

Meghna Apparao
Director

Meta

Vaibhav Pandey
Co-founder & CTO

tyroo

The IAB SEA+India is the not for profit industry association that unites the digital marketing industry across 7 countries in Southeast Asia and India for collective progress and responsible growth.

The membership, comprising platforms, agencies, publishers, retailers, and brands, has a highly engaged global audience who see IAB SEA+India as a neutral source of truth on what's now and next for digital marketing in the region.

With a dual Regional Board structure and active specialist Councils, practitioners collectively design solutions such as playbooks, framebooks and whitepapers specifically for the region.

Visit iabseaindia.com for more information about becoming a member.

Click here to connect with us directly.