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From big shop to click-and-go

How Asia's shoppers buy their groceries

Weekly grocery shopping remains a cornerstone of household routines across Singapore, Hong Kong and Malaysia, yet how residents in each market complete this task reveals important differences shaped by urban density, digital infrastructure, and cultural expectations. The data confirms that while the physical store continues to anchor the grocery ecosystem, distinct patterns of channel adoption, mission types, and friction tolerance are emerging across these three dynamic Asian markets.

Shopping habits in flux

The weekly big shop endures, but other top missions vary

The weekly 'Big Shop' forms the backbone of grocery habits across all three markets, with 77.4% of Key Asian Grocery Markets shoppers identifying this as their main purpose. However, the strength of this commitment varies by market. Shoppers in Hong Kong show the strongest connection to the weekly big shop, with 84.8% citing it as their main grocery goal, the highest rate across the region. This reflects Hong Kong's compact city environment, where smaller living spaces encourage frequent, planned restocking overt bulk buying.

Singapore paints a different picture. Although the weekly shop is dominant at 72.2%, the city-state has a much higher share of top-up shoppers, at 23.4%, which is over five times Hong Kong's rate of 4.4%. This pattern indicates that Singaporean households have incorporated more frequent, smaller trips into their routines, possibly due to the density of retail options and the convenience-driven culture that characterizes the market.

Malaysia falls between the other two markets, with 75.2% doing weekly shopping and 14.4% mainly performing top-up missions.

Notably, Malaysia has the highest share of urgent or emergency shoppers, at 7.8%, nearly three times Singapore's 2.4%, showing that last-minute grocery needs are more prevalent in the Malaysian market.

Singapore leads digital adoption

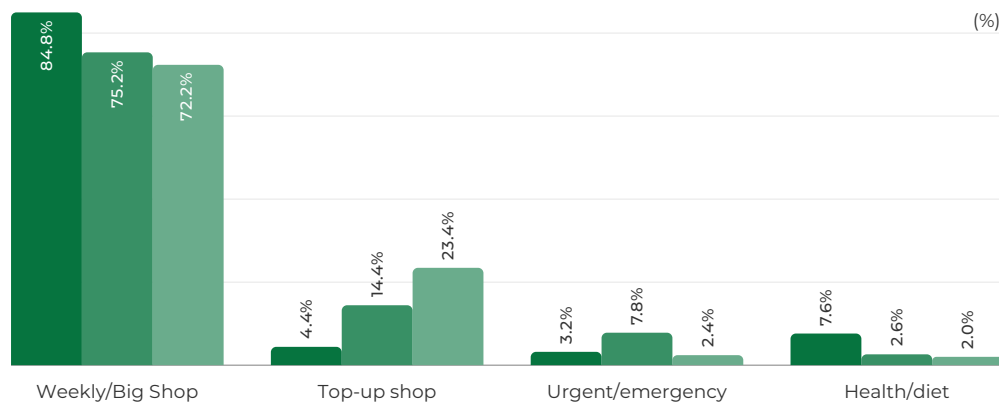
Across the three markets, in-store shopping remains the main method for most households, with an average of 74.3% of Key Asian Grocery Markets shoppers saying a physical store is their primary grocery channel. Malaysia and Hong Kong have nearly identical reliance on in-store shopping at 77.2% and 76.6%, respectively, while Singapore stands out as the market where digital channels have made the biggest inroads, with only 69.0% relying mainly on in-store shopping.

This circa 8-percentage-point gap between Singapore and its regional neighbors can be attributed to the adoption of supermarket apps. An impressive 17.1% of Singaporean shoppers now consider a supermarket's own app their main shopping

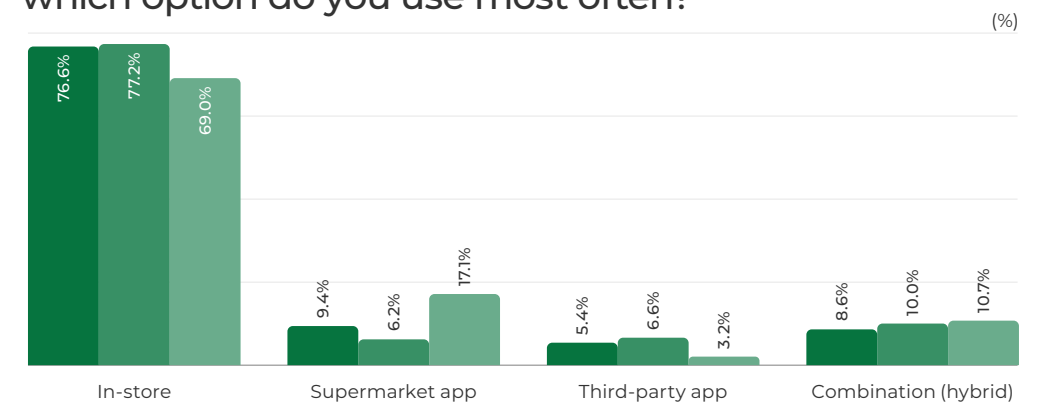
■ Hong Kong ■ Malaysia ■ Singapore

Inside Retail x Morgan's Retail consumer survey 2025

Primary grocery shop mission by market



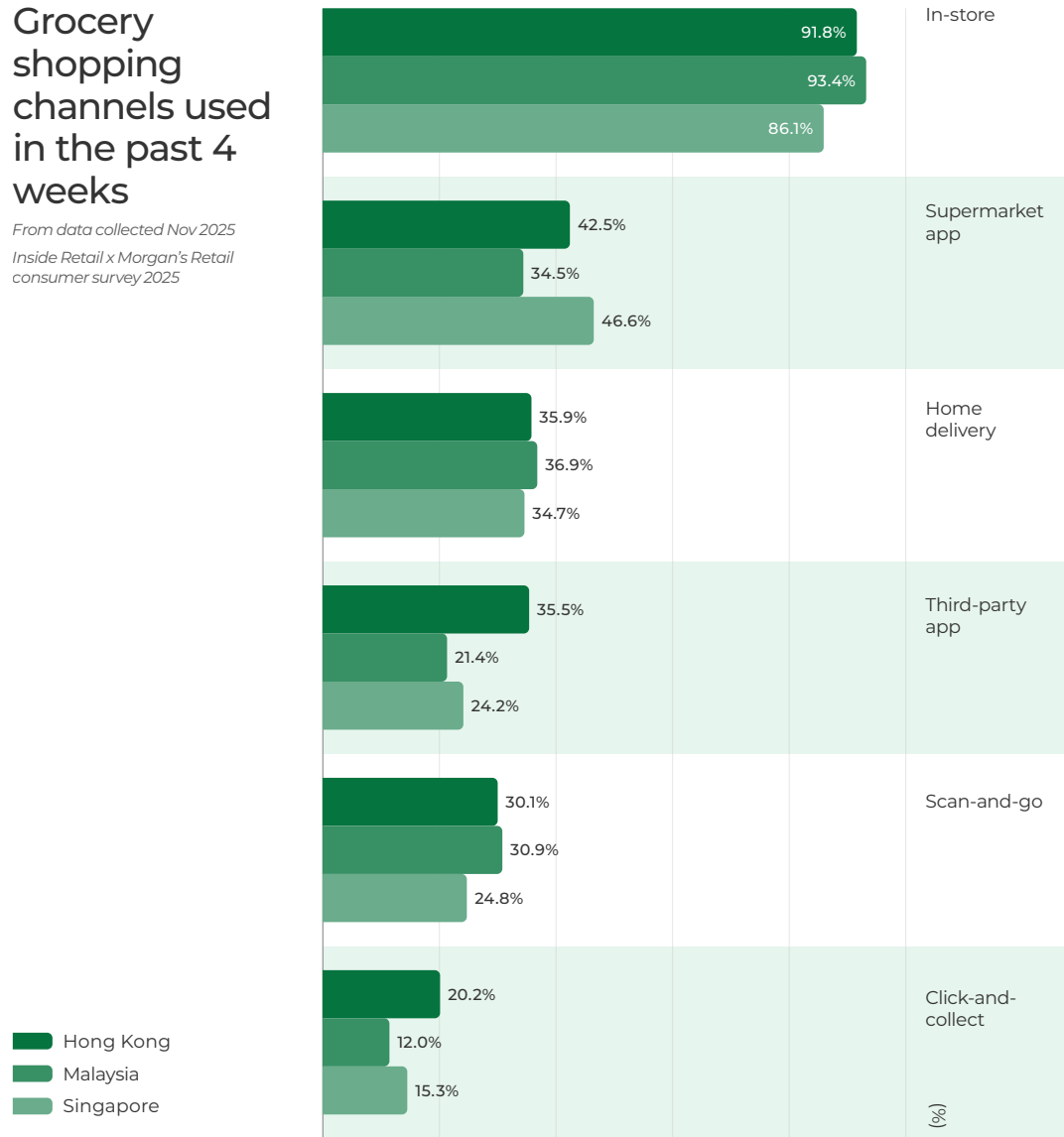
Thinking about your main grocery shop, which option do you use most often?



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Grocery shopping channels used in the past 4 weeks

From data collected Nov 2025
Inside Retail x Morgan's Retail
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method, nearly twice Hong Kong's rate (9.4%) and almost three times Malaysia's (6.2%). Singapore's advanced digital infrastructure, high smartphone penetration, and proactive app strategies by retailers like FairPrice have helped make app-first shopping mainstream for a substantial segment of the population.

Malaysia shows the highest reliance on third-party delivery apps (6.6%), followed by Hong Kong (5.4%). For hybrid journeys, Singapore leads (10.7%), marginally ahead of Malaysia (10.0%).

Channel layering: The rise of multi-channel behavior

Examining which channels shoppers used in the past four weeks reveals a more detailed picture than just the main methods. In-store visits are still very common: 93.4% of Malaysian shoppers have visited a physical supermarket in the past month, followed by Hong Kong at 91.8% and Singapore at 86.1%. The physical store isn't being replaced; instead, it is being complemented by an increasing range of digital options.

Singapore leads in supermarket app usage at 46.6%, confirming that nearly half of Singaporean shoppers have engaged with a retailer's own digital platform in the past month. Hong Kong stands out for third-party app engagement, at 35.5%, much higher than Malaysia (21.4%) and Singapore (24.2%), highlighting the penetration of delivery platforms in the Hong Kong market.

Home delivery adoption is consistent across all three markets, at 34.7% to 36.9%, indicating that roughly one-third of shoppers have used delivery services regardless of local market conditions. Scan-and-Go technology has similar adoption rates in Hong Kong (30.1%) and Malaysia (30.9%), with Singapore trailing at 24.8%.

Long queues: The universal frustration

When shoppers were asked about the most frustrating aspects of their grocery shopping, one issue stood out above the rest: long queues. Across the Key Asian Grocery Markets, an average of 65.8% of shoppers mentioned queues as their top frustration, more than twice the level of the next most common concern.

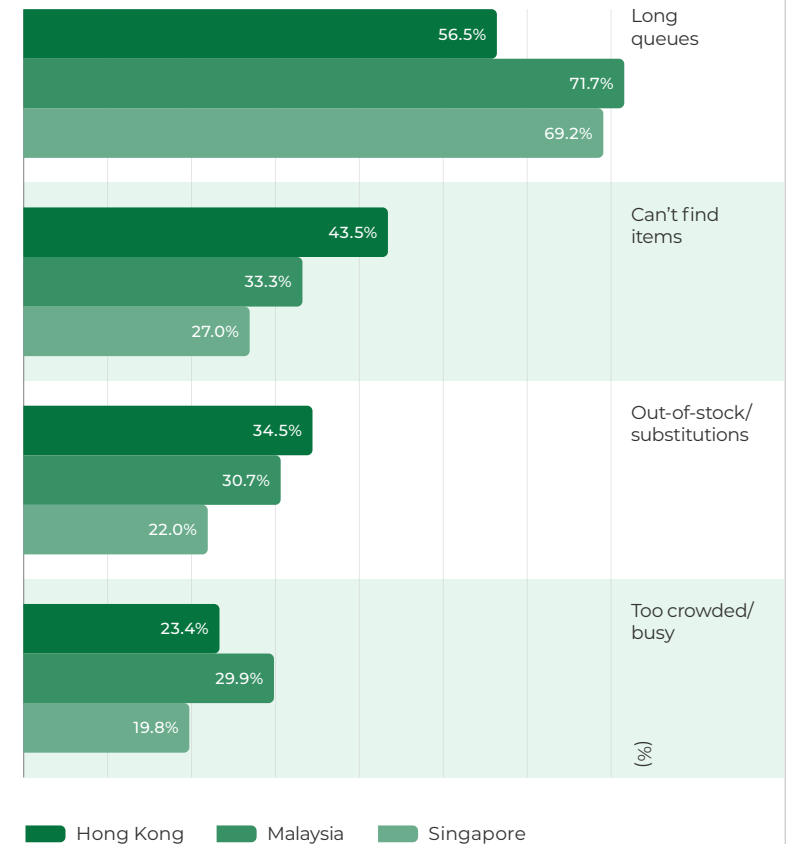
The queue problem is perceived as most severe in Malaysia, where 71.7% of shoppers find it frustrating, closely followed by Singapore with 69.2%. Hong Kong, despite its reputation for density and crowds, exhibits less queue frustration, with 56.5% finding it frustrating. This may be due to Hong Kong's quicker average shopping times and more efficient checkout processes, or it may simply have different cultural expectations about waiting.

Beyond queues, markets differ on the most common secondary frustrations. Hong Kong shoppers are most worried about not finding what they want, at 43.5%, 16 percentage points higher than in Singapore (27.0%). This discoverability issue may stem from Hong Kong's smaller store formats and more limited range, compared with the larger hypermarket formats common in Singapore and Malaysia. Hong Kong also ranks highest in frustration with substitutions and out-of-stock items, at 34.5%, indicating inventory management is a significant issue in this market.

Singapore records the lowest 'can't find items' frustration (27.0%), while Hong Kong is highest (43.5%), highlighting wayfinding challenges across different retail formats.

Grocery shopping frustrations by market

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Hong Kong's rapid rhythm: Shoppers are super quick

The data shows differences among the countries in how long shoppers spend on their main grocery trip. Hong Kong shoppers skew strongly toward sub-30-minute trips, while Malaysian shoppers over-index to 45-plus minute trips. Singapore sits between these two patterns.

In Hong Kong, 74.3% of shoppers complete their main shop in less than 30 minutes, with 19.0% finishing in under 15 minutes. This quick pace aligns with Hong Kong's smaller store formats, and the efficiency-driven culture of the city.

Malaysian shoppers spend considerably more time, per main shop. Over 31% of shoppers in Malaysia spend 45 minutes or more in-store, with 10.4% exceeding an hour. This longer shopping time reflects the dominance of larger hypermarket formats, bigger household sizes, and possibly a more browsing-focused shopping culture.

Singapore has an average shopping time of 32.2 minutes, placing it between the other two markets. Most Singaporean shoppers (78.8%) spend between 15 and 45 minutes, indicating a well-matched balance between store formats and shopping habits.

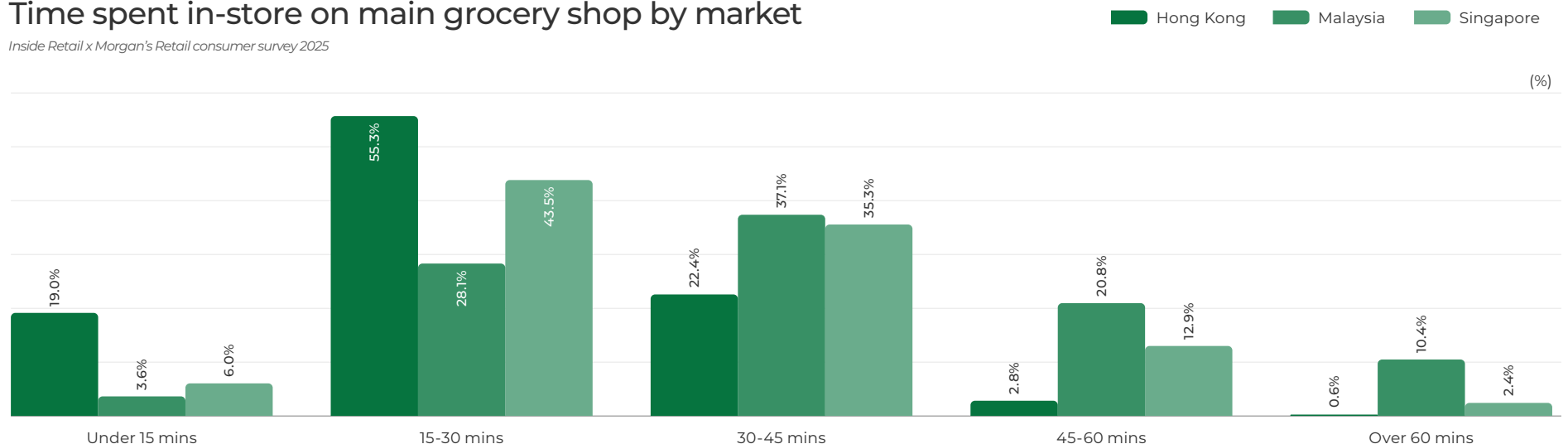
Abandonment behavior: Hong Kong's fragile loyalty

Basket abandonment, where shoppers leave a store due to inconvenience or friction, serves as a key indicator of how strong customer loyalty remains when processes falter. The data shows that Hong Kong shoppers are the most likely to abandon their basket when encountering friction.

A notable 47.5% of Hong Kong shoppers say they "sometimes" abandon their basket because of inconvenience, while only 4.6% state they "never" do, marking the lowest rate in the region by a significant margin. This indicates a concerning

Time spent in-store on main grocery shop by market

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loyalty profile: When issues arise in Hong Kong stores, shoppers are highly prone to walk away. Singapore and Malaysia shoppers exhibit more balanced abandonment patterns, with roughly 15-16% of shoppers in each market reporting they never abandon their baskets. However, the “high churn” segment - those who abandon “often” remains fairly consistent across all three markets at, 10-12.6%, suggesting a notable minority of shoppers across the region are ready to defect at the first sign of friction.

Note that the three markets exhibit different demographic profiles that may influence some findings. Hong Kong’s sample leans towards the middle-age brackets, with 52.9% of respondents aged 35-54, the highest proportion among

the three markets. Malaysia has the youngest profile, with 40.5% of respondents aged 18-34. Singapore displays the most balanced distribution but has the highest proportion of older shoppers, with 24.8% aged 55 and above. These demographic differences should be considered when interpreting market-specific patterns; for example, Malaysia’s longer shopping times may partly reflect its younger demographic engaging in more exploratory shopping behavior.

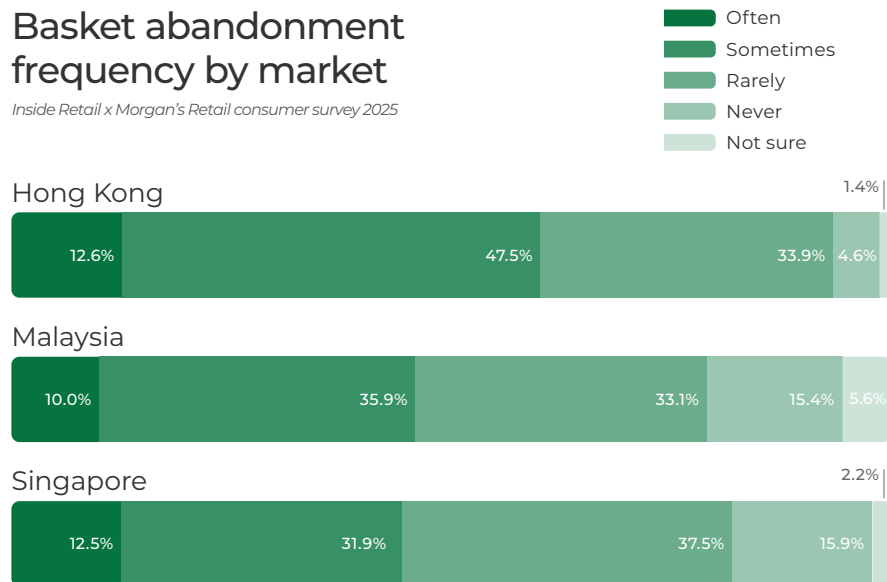
Queues, crowds, and abandoned baskets: The threats to grocery growth in Asia’s big three markets

The data confirms that in-store grocery shopping remains dominant across Singapore, Hong Kong, and Malaysia, but these three markets are evolving along distinct paths. Singapore has become the most digitally advanced market, with the highest uptake of supermarket apps and the lowest dependence on in-store shopping. Hong Kong operates at a quicker pace with shorter, more focused shopping trips but shows the greatest sensitivity to friction, abandoning baskets at significantly higher rates than its regional neighbors. Malaysia retains a strong traditional in-store shopping culture with longer, more immersive trips but experiences the most queue-related frustration.

For retailers, the operational priority is clear: Queue management offers the biggest chance to reduce friction across all three markets. Besides this shared challenge, market-specific priorities include inventory accuracy and product availability in Hong Kong, wayfinding and navigation in Singapore, and crowd management in Malaysia. Tackling these friction points is not just about improving satisfaction; the abandonment data shows that unresolved friction actively causes revenue loss, especially in the highly competitive Hong Kong market, where shopper loyalty seems most fragile.

Basket abandonment frequency by market

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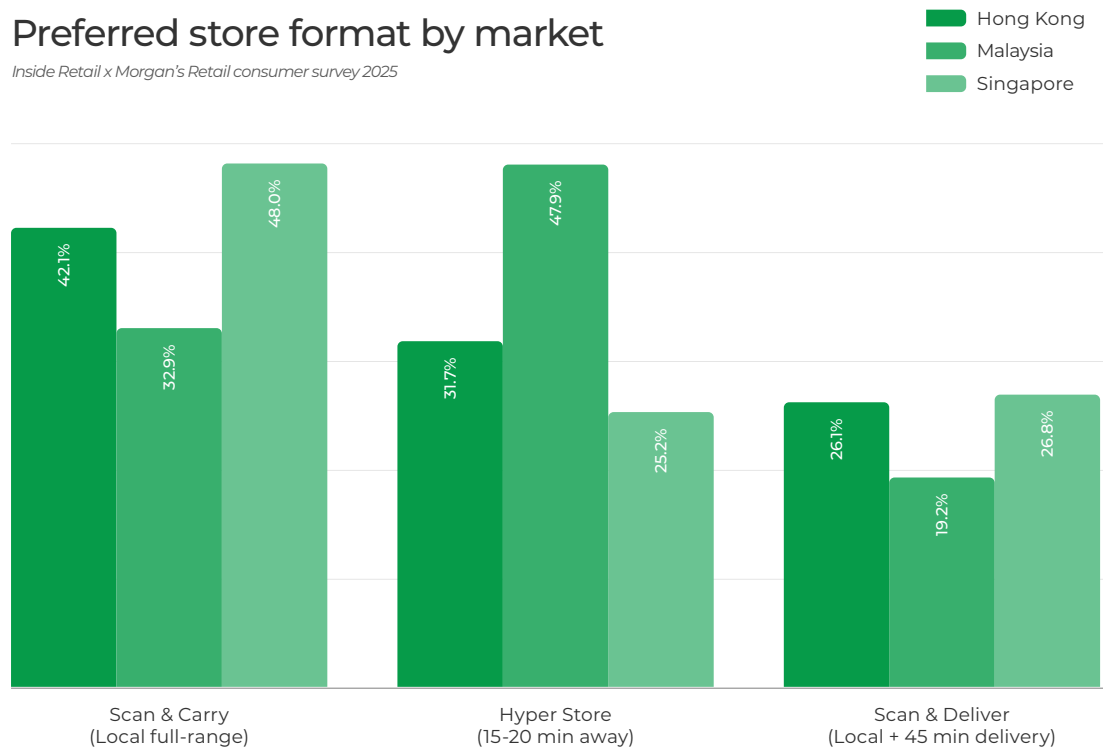
The hybrid store

Proximity, format, and
the 'shop-and-drop' opportunity

The concept of convenience is shifting from being just about location to a more sophisticated mix of proximity, format, and service integration. While the physical store still plays a key role, shoppers across Singapore, Hong Kong, and Malaysia are actively redefining their expectations. The data shows a clear difference: Singaporean shoppers prefer hyper-proximity, while Malaysian and Hong Kong shoppers are more willing to travel farther for larger formats or better value. In all three markets, however, a major opportunity is emerging for a 'Scan & Deliver' model that separates the act of shopping from the hassle of carrying goods.

Preferred store format by market

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Format preferences: The split between local and hyper

Shoppers' ideal store formats vary greatly depending on the market, reflecting local urban geography and lifestyle patterns. In Singapore and Hong Kong, there is a clear preference for local, full-range stores that support a quick "Scan and Carry" mission. Nearly half of Singaporean shoppers (48.0%) and 42.1% of Hong Kong shoppers see this as their ideal format, valuing the ability to finish shopping quickly close to home or along their transit route.

Malaysia shows a different preference. Here, the 'larger hyper store' located 15-20 minutes away is the preferred choice, selected by 47.9% of shoppers, almost twice the rate in Singapore (25.2%). This reflects Malaysia's car-focused culture and the widespread presence of mall-based hypermarkets that act as lifestyle hubs rather than simply utility points.

The Scan & Deliver concept - a local store with Scan-and-Go technology plus 45-minute home delivery - continues to generate steady interest across all three markets, ranging from 19.2% in Malaysia to 26.8% in Singapore. This consistency indicates that, regardless of current format preferences, about one-quarter of shoppers are open to a hybrid model that eases the physical burden of the weekly shop.

Basket dynamics: Small, frequent and efficient

Contrary to the Western 'pantry-loading' model, the Key Asian Grocery Markets' main weekly shop is characterized by smaller, more manageable basket sizes. Hong Kong stands out for its extreme efficiency: a striking 78.9% of shoppers expect their main weekly shop to consist of just 1-10 items. This figure challenges the very definition of a "Big Shop," suggesting that for Hong Kong residents, the weekly shop is, instead, a high-frequency replenishment mission necessitated by limited kitchen storage and a culture of buying fresh daily.

Malaysia and Singapore show larger basket expectations but theirs are still modest by Western standards. In Malaysia, 40.7% of shoppers expect to buy more than 10 items during a main shop, with the basket size reaching roughly 14 items. Singapore sits in the middle, with 33.2% expecting baskets larger than 10 items. For retailers, this has profound implications for store layout and checkout design. The dominant mission is not a trolley-filling expedition but a trip for a smaller basket. Speed, self-checkout efficiency, and navigable layouts are far more critical than large-volume promotion aisles.

The 15-minute radius: Singapore's non-negotiable limit

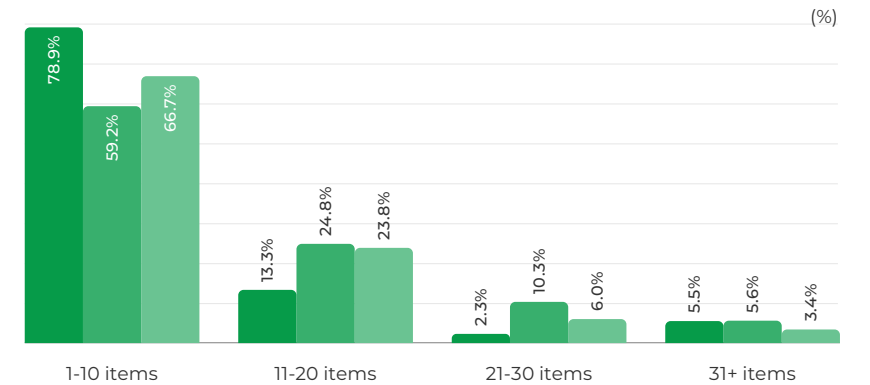
Tolerance for travel highlights the biggest divide in the dataset. Singaporean shoppers are notably proximity-focused: 69.7% are unwilling to travel more than 15 minutes for their weekly grocery shop, with one-third (33.0%) expecting their store to be under 10 minutes away. In the dense, well-connected city-state, convenience is measured in minutes, and catchment areas are very tight.

In contrast, shoppers in Hong Kong and Malaysia show greater willingness to travel. About 65-70% of shoppers in these markets are happy to travel more than 15 minutes for their groceries. In Malaysia (70.4%), this shows a willingness to drive to hypermarkets. In Hong Kong, (65.3%), it probably reflects the need for transit travel to reach preferred supermarkets in a city with vertical density.

This disparity indicates that while store network density is the main success factor in Singapore, destination appeal and range are much more important in attracting customers in Malaysia and Hong Kong.

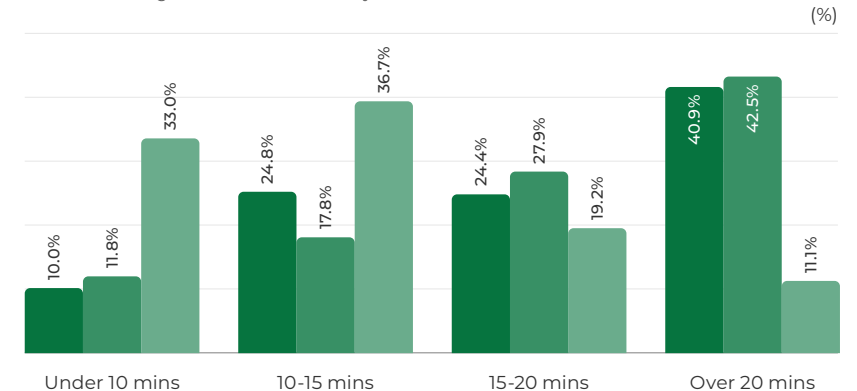
Average main-shop basket size by market

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Maximum acceptable travel time by market

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The Shop-and-Drop opportunity: A universal desire

Perhaps the most actionable insight for future retail models is the strong demand for separating purchasing from carrying. When asked how often they would use a guaranteed 45-minute delivery service instead of carrying groceries home, over one-third of shoppers in Singapore (35.1%) and Hong Kong (33.9%) said they would do so “most of the time” or “always.”

Even in Malaysia, where car usage often makes carrying easier, 29.4% of shoppers fall into this “high potential” segment for Shop-and-Drop.

This finding confirms the Shop and Drop hybrid model: Shoppers still want to visit the store to pick out fresh produce and check out new products but they are increasingly annoyed by the hassle of carrying heavy bags home, especially in humid weather and on public transport.

For retailers, this indicates that the “last mile” isn’t just about online orders but also in-store purchases. A service enabling

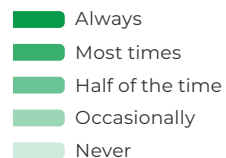
shoppers to scan their items in-store and walk out hands-free, with goods delivered to their home within the hour, tackles the main friction point for about one-third of the high-value customer base across the region.

The new sweet spot: Sensory in-store shopping paired with hands-free home delivery across Key Asian Grocery Markets

The ideal store in the Key Asian Grocery Markets isn’t a single idea. In Singapore, it’s a local neighborhood spot less than 10 minutes away. In Malaysia, it becomes a destination hypermarket a 20-minute drive away. In Hong Kong, it’s a quick, efficient transit store for small, frequent shops. Despite this variety of preferences, one thing unites them: the wish to ease the physical load of shopping. With about 30-35% of shoppers in all markets keen on a Shop and Drop service, retailers who blend the sensory experience of the physical store with the logistics of home delivery are set to gain big in the next phase of retail growth.

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Willingness to switch to 45-minute delivery by market



Hong Kong



Malaysia



Singapore



Automation's safety net

Why shoppers still need
people in the loop

This section examines the delicate balance between efficiency and reassurance in the automated store experience. It explores how shoppers in Singapore, Hong Kong and Malaysia feel about using 'staffless' formats, the specific anxieties that hold them back - from tech failures to billing errors - and the human or digital safety nets needed to build trust. The data delivers a clear directive: Automation is welcomed, but only when it is supported by visible assistance and fail-safe policies that ensure no shopper is left stranded when technology fails.

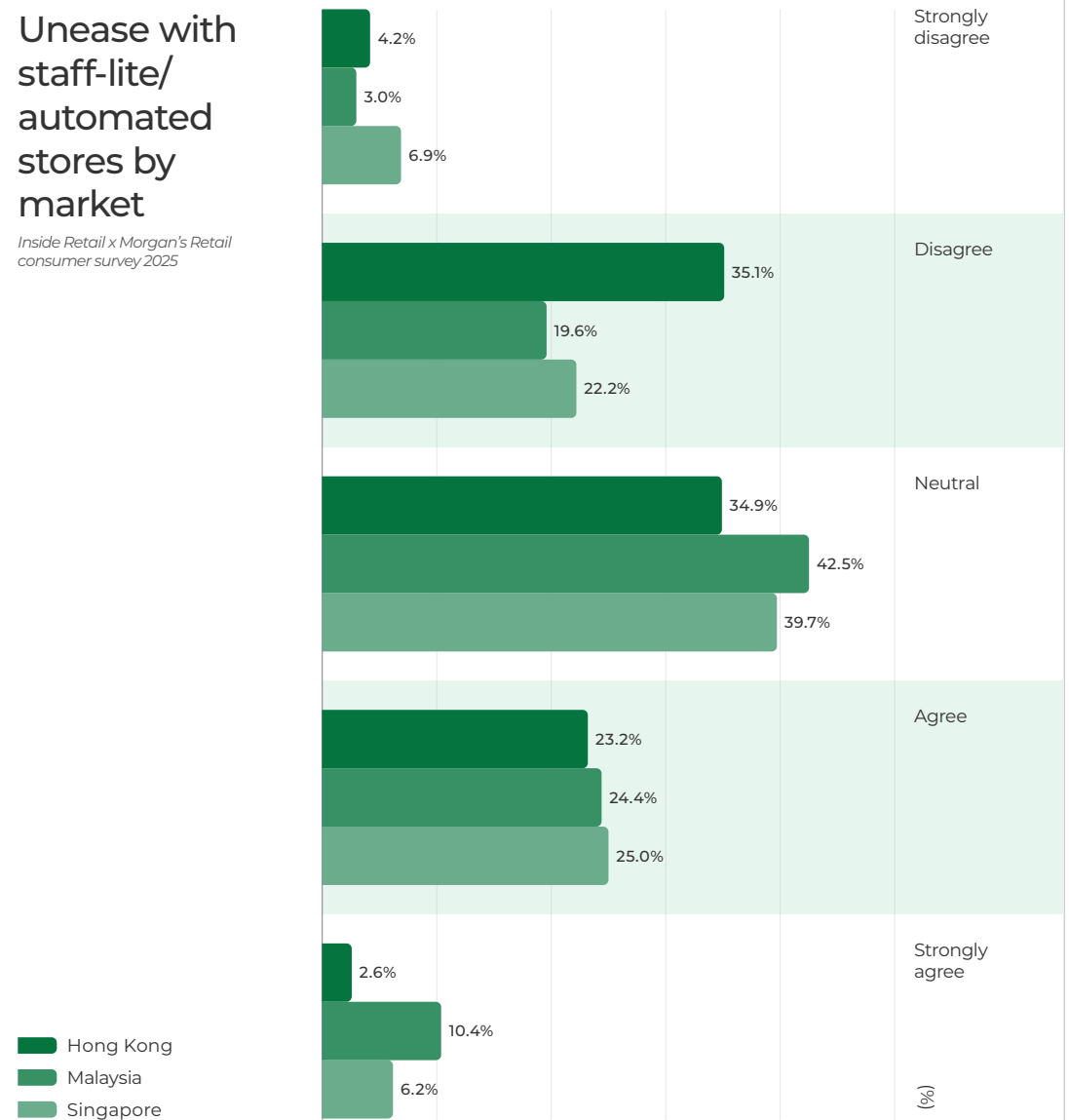
Unease with automation differs by region

While the idea of automated retail is progressing, consumers' comfort levels differ quite a bit across the region. Malaysia stands out as the market most wary of staff-lite stores, with 34.8% of shoppers agreeing or strongly agreeing that such formats make them "uneasy." This shows that for more than one-third of Malaysian shoppers, removing human staff isn't seen as a convenience but as a loss of support or security.

Singapore is close behind, with 31.2% feeling uncomfortable. Despite its high level of digital advancement, many Singaporean shoppers still feel cautious about fully automated environments, possibly due to high expectations for service efficiency and a low tolerance for failures.

Unease with staff-lite/automated stores by market

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Hong Kong shoppers seem the most at ease, with only 25.8% expressing discomfort - the lowest in the region. This matches the market's fast-paced, efficiency-driven culture described in Section 1, where speed often takes priority over warmth of service. Still, even here, about a quarter of the market remains uneasy, pointing out that automation is not yet fully accepted in most places.

The trust gap: Tech failures and ghost stores

When examining why shoppers feel uneasy, the data shows that fears are based on operational failures, rather than vague anxieties. The top concern across the region is "Store outages/tech failures."

This fear is especially strong in Malaysia (63.9%) and Hong Kong (55.1%), where most shoppers worry about being

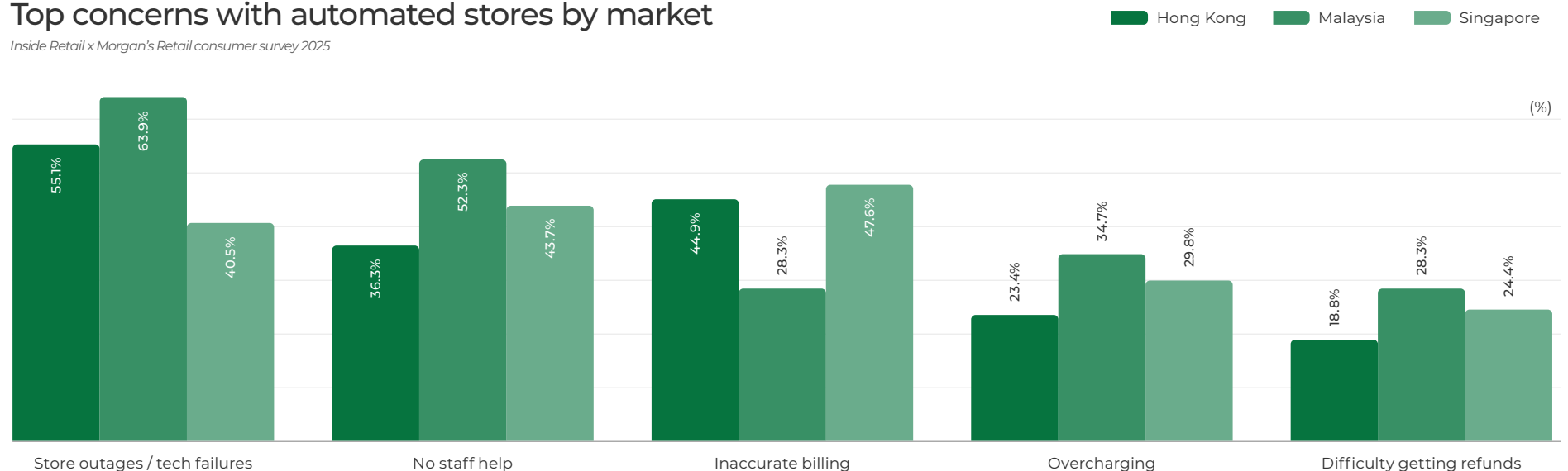
trapped in a store if the system crashes. In Singapore, although system crashes remain a major concern (40.5%), worries are increasingly focused on financial accuracy.

Inaccurate billing is a major concern for Singaporean (47.6%) and Hong Kong (44.9%) shoppers, nearly matching the worry over tech failure. In these high-cost-of-living markets, fear of being overcharged by an algorithm acts as a strong barrier to adoption.

"No staff help" ranks as the second-highest concern in Malaysia, at 52.3%, which supports the idea that Malaysian shoppers prioritize human assistance more than their regional counterparts. They are less concerned about technology billing them incorrectly (28.3%) and more concerned about having nobody to turn to when issues arise.

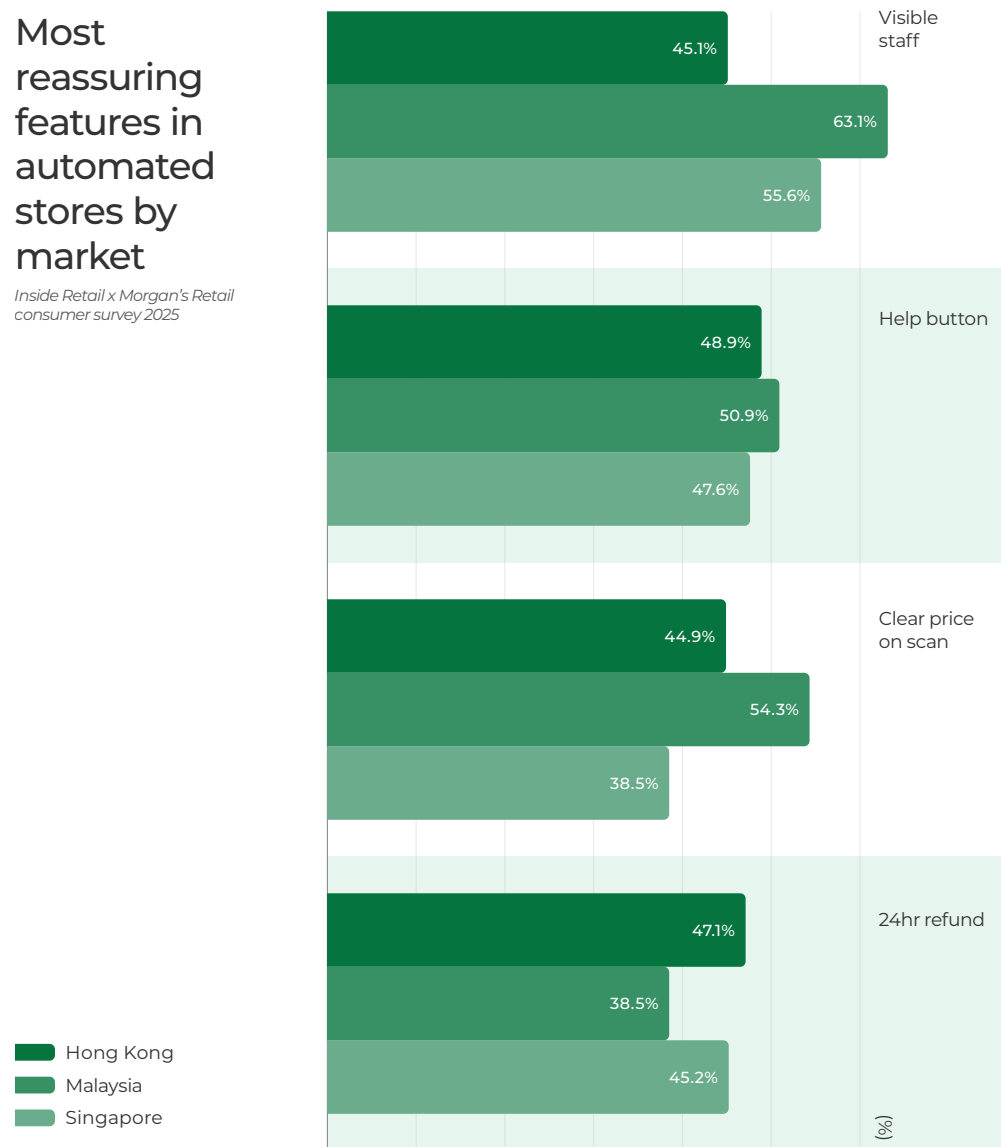
Top concerns with automated stores by market

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Most reassuring features in automated stores by market

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The reassurance hierarchy: Visible staff vs. digital safety

To build trust, retailers need to use specific reassurance signals. The data reveals a clear order of priorities: Visible staff remains the top reassurance factor, especially in Malaysia (63.1%) and Singapore (55.6%). Even in an 'automated' store, shoppers want to see a human presence, like a concierge or troubleshooter, who shows that help is available if needed.

In Hong Kong, priorities differ. While staff presence is important (45.1%), Hong Kong shoppers place slightly more importance on "24-hour, no-questions refunds" (47.1%) and a "Help button in-store" (48.9%). This indicates a more transactional approach to trust: *If the machine makes a mistake, can I quickly fix it and get my money back without any fuss?*

"Clear price shown on scan" is another important reassurance factor, scoring highly in Malaysia (54.3%) and Hong Kong (44.9%). This directly tackles the concern of inaccurate billing, acting as a real-time audit tool that restores control to the shopper.

Willingness to try: High interest, conditional loyalty

Despite these concerns, the core demand for automated formats remains very high. When asked if they would try such a store at least once, more than 87% of shoppers across all three markets said “Yes,” peaking at 92.5% in Singapore.

This data shows that the unease identified earlier isn't a refusal to participate; it's a conditional caution. Shoppers are ready and willing to embrace automated retail, provided the retailer effectively addresses their specific fears - about tech reliability in Malaysia and Hong Kong, and billing accuracy in Singapore.

Fast, automated, but human-anchored: Rethinking “frictionless” grocery retail

The shift to automated retail in the Key Asian Grocery Markets isn't hindered by a lack of consumer interest or willingness to try. Instead, it faces specific operational concerns. Malaysian shoppers worry about abandonment and tech failures, insisting on a visible human safety net. Meanwhile, shoppers in Singapore and Hong Kong are concerned about financial errors, demanding transparent pricing and straightforward refund policies.

For retailers, the winning approach for staffless stores paradoxically involves strategic staffing. The data shows that completely unstaffed ghost stores risk alienating a third of the market. The ideal model is staff-lite but visible, automated for speed, but human-anchored for trust, with clear, frictionless policies for when the technology inevitably hiccups.

Would you consider using automated stores weekly?

Malaysia

85.2%

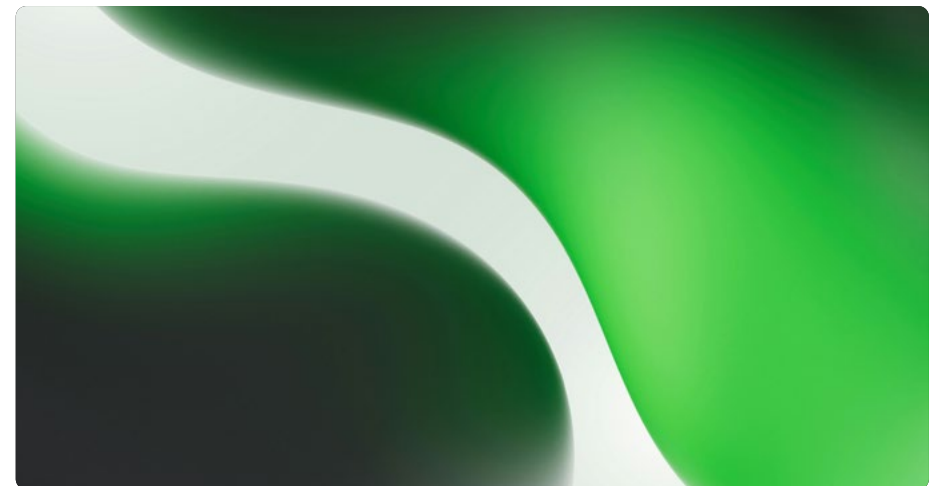
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Singapore

82.8%

Hong Kong

79.1%



Click, scan, done

Designing a truly
seamless grocery
journey

If the safety net gives the confidence to try new formats, the frictionless journey offers the reason to stay. Shoppers in Key Asian Grocery Markets imagine a grocery experience that is quicker, smarter, and more integrated than today's model. However, their excitement is held back by specific operational fears. The data highlights a crucial fact: The success of Scan-and-Go technology will not be based on its novelty, but on the reliability of the barcode scanner and the speed of the exit gate.

The reliability hurdle: Scanning issues dominate

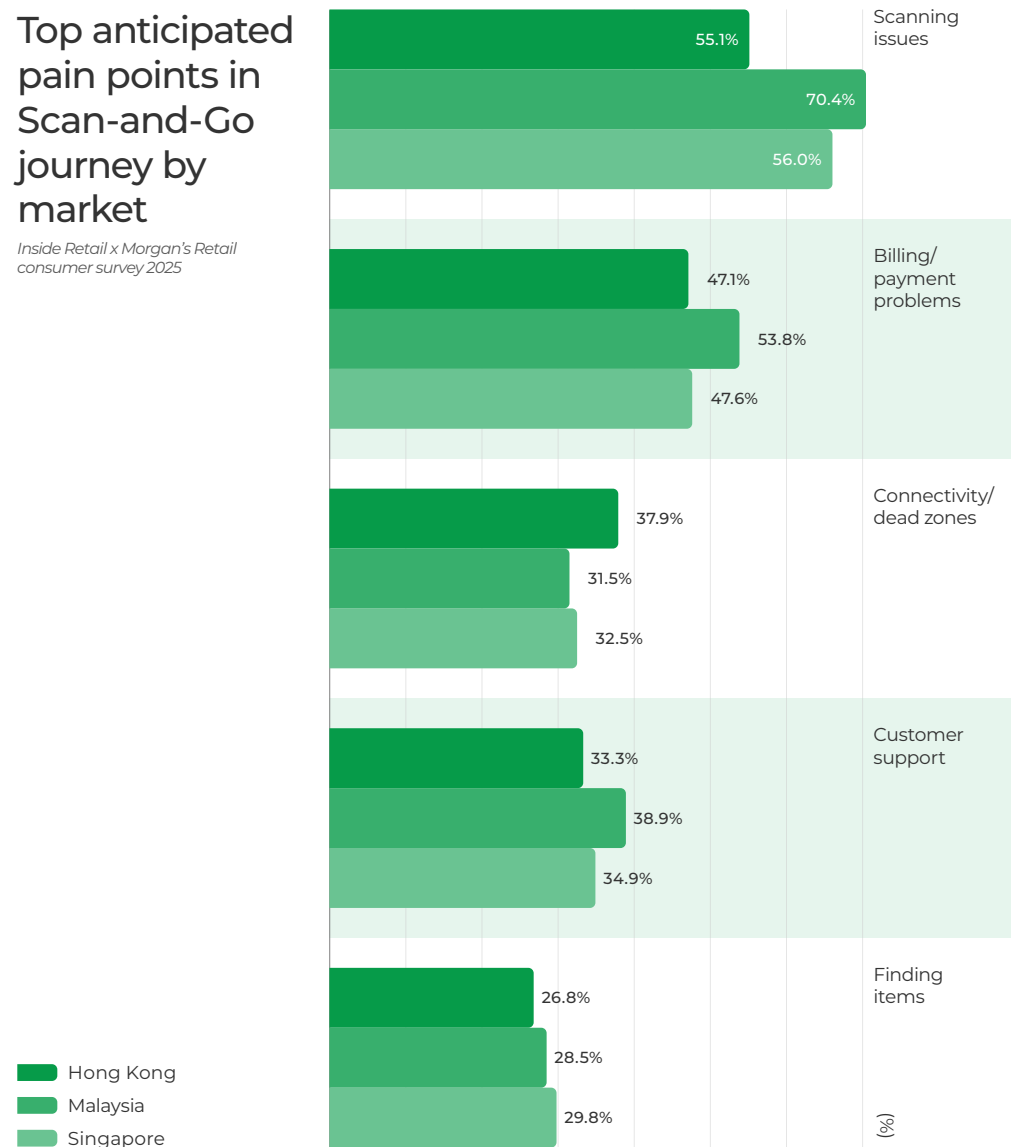
Across all three markets, the biggest anticipated pain point for Scan-and-Go shopping is "Scanning issues", such as frozen apps and unreadable barcodes. This concern overshadows all others, especially in Malaysia, where 70.4% of shoppers mention it as a major frustration. In Singapore (56%) and Hong Kong (55.1%), most shoppers also worry that the technology simply won't work as promised.

This widespread concern reveals a core truth: Shoppers lack confidence in the basic hardware of the phone's camera-to-barcode interface. If a shopper has to scan an item three times, the convenience benefit disappears.

Secondary concerns emphasize market-specific worries. Shoppers in Hong Kong, Singapore and Malaysia are concerned about "Billing/payment problems" (47.1%, 47.6%, and 53.8% respectively), reflecting the financial trust issues mentioned earlier. "Connectivity dead zones," often cited as a major hurdle in other regions, are a lower-tier concern (32-38%) in these highly connected Asian cities, though still enough to require offline backup options.

Top anticipated pain points in Scan-and-Go journey by market

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The speed of exit: Singapore's two-minute warning

The promise of Scan-and-Go is speed, and shoppers have clearly defined what that means. When asked how long they're willing to wait to leave the store after scanning their last item, the acceptable time is very brief.

Singaporean shoppers are the most impatient in the region: 66.5% expect to leave the store in under two minutes, with 27.4% demanding an "instant" exit. This reflects Singapore's efficiency-driven culture; any security check that causes a bottleneck at the door will ruin the experience.

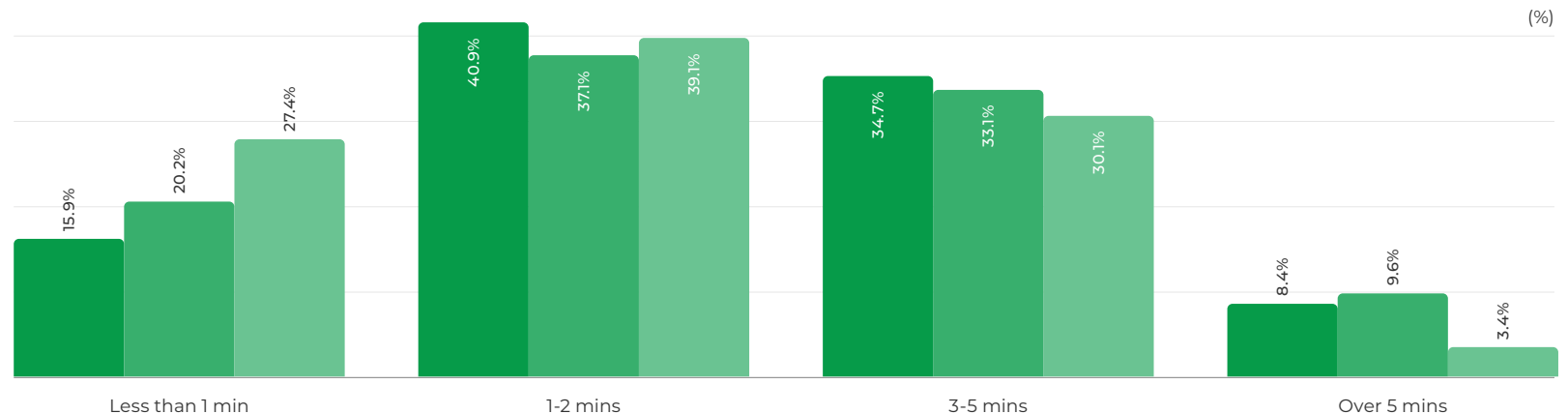
Hong Kong shoppers show slightly more patience, with 34.7% accepting a 3- to 5-minute exit process, perhaps reflecting a resigned acceptance of queues in the dense city. Malaysia sits in the middle, but still, over 57.3% expect to be out in under two minutes.

For retailers, this sets a clear operational KPI: The validation process, whether involving random checks or gate scans, must approve a customer in less than 120 seconds. Anything slower is not considered frictionless.

Acceptable time to exit store after scanning by market

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■ Hong Kong
■ Malaysia
■ Singapore

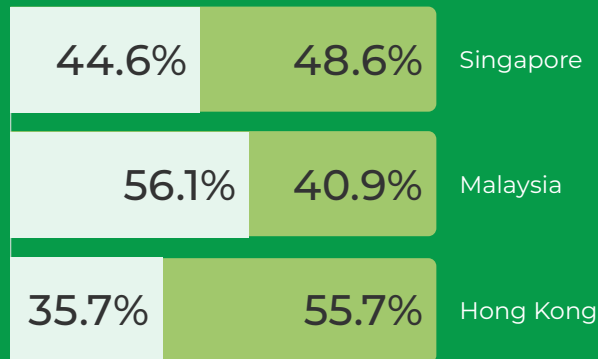


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**Interest in
advanced
in-store
features by
market**

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Yes
Maybe



The appetite for 'smart' stores is growing

Despite these fears, the desire for a digitally enhanced store experience remains strong. When we ask about advanced features such as list syncing (app-to-store) and in-store guidance (aisle maps), rejection rates are low (3-9%).

Malaysia shows the most enthusiasm, with 56.1% of shoppers saying "Yes" to enabling these features, and another 40.9% saying "Maybe." This indicates a market that sees the smartphone as an essential shopping companion and is eager for a deeply integrated app experience.

Hong Kong shoppers are the most cautious, with only 35.7% saying a definite "Yes" and 55.7% saying "Maybe." This hesitation probably relates to data privacy concerns; Hong Kong shoppers want to see the value before they fully embrace tracking features. Singapore sits in the middle (44.6% Yes), reflecting a pragmatic 'show me it works' attitude.

The universal "Maybe" segment (40-56%) presents a notable opportunity. These shoppers are not against innovation. They are simply waiting for a persuasive reason that demonstrates the feature saves time rather than just adding novelty.

Scan-and-Go wins when it's fast, foolproof, and queue-free

The plan for a successful Scan-and-Go rollout in the Key Asian Grocery Markets is simple. It doesn't require whiz-bang features; it requires reliable performance. Retailers' main aim should be to make the scanning process foolproof, ensuring it works on the first attempt every time, and to design an exit process that clears customers in under two minutes. Once these basic standards are met, interest in advanced features like list syncing and in-store maps becomes high, especially in Malaysia and Singapore. The seamless experience isn't a distant ideal; it's a practical must-have, along with a system that doesn't crash and a queue that doesn't form.

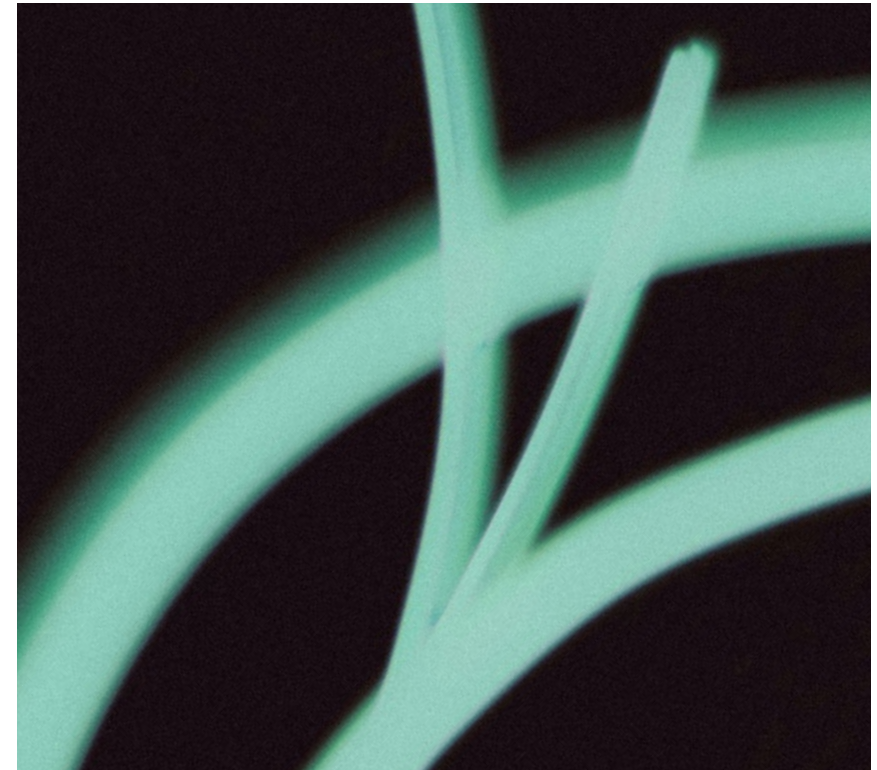
The privacy threshold

What shoppers will
(and won't) share

Shoppers clearly differentiate between data that aids store operations and data that invades their privacy. “Location during shop” and “Purchase history” enjoy high acceptance, with refusal rates (those saying “Never”) falling below 9% across all three markets. In Malaysia, refusal for location tracking is just 2%, showing a receptive environment for operational efficiency tools.

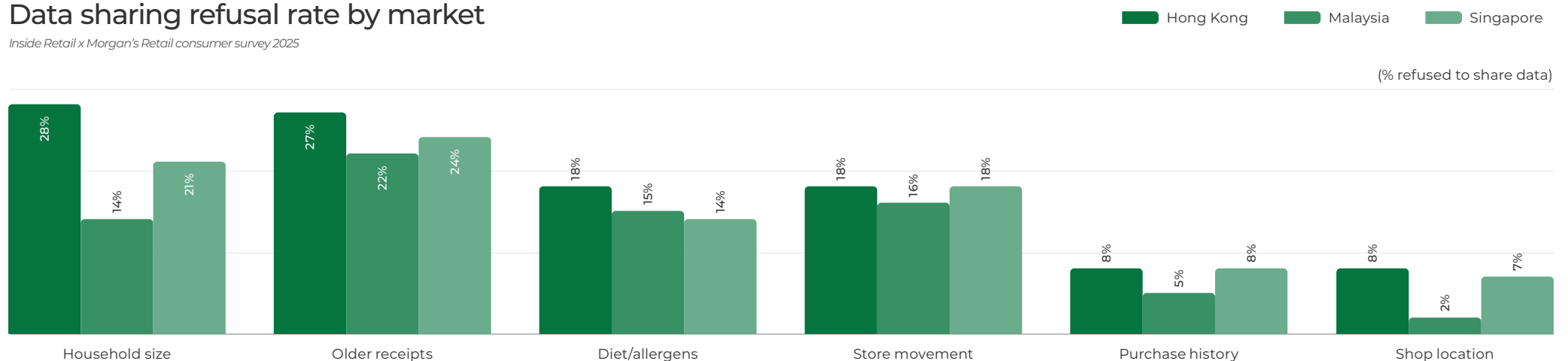
The door slams shut, however, when retailers ask for data that seems unnecessary for the immediate transaction. “Household size” and “Receipts from other stores” face the most resistance. Hong Kong shoppers are particularly cautious, with 28% refusing to share household size and 27% refusing to share external receipts. Singapore shows similar numbers (21% and 24% refusal, respectively).

This signals that the era of broad data harvesting is over. Retailers must treat data access as a tiered privilege: Operational data is standard, but lifestyle data must be earned through high-value exchanges.



Data sharing refusal rate by market

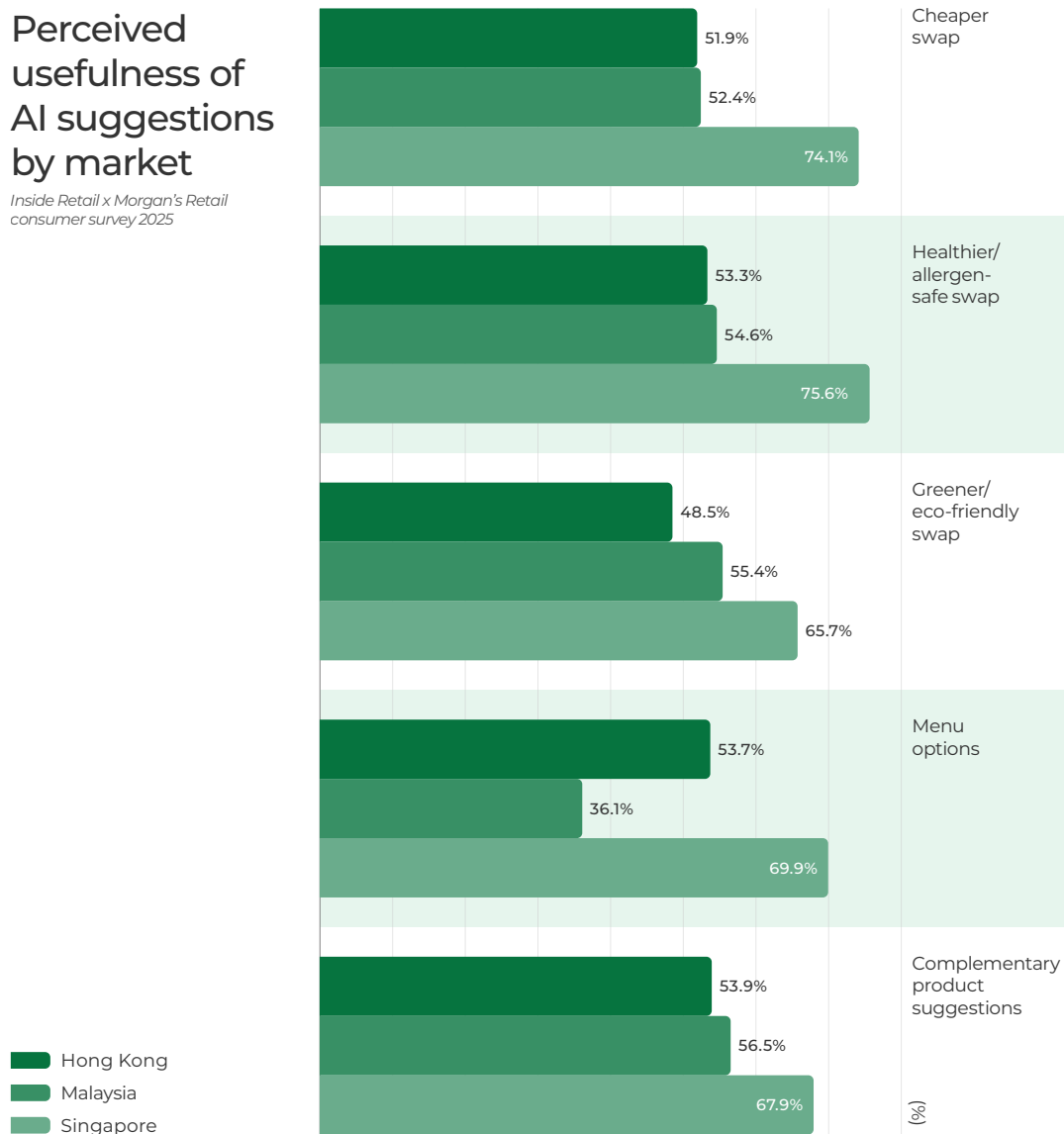
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Perceived usefulness of AI suggestions by market

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AI suggestions: The pragmatism of 'health and wealth'

When AI offers advice, shoppers assess its usefulness. Malaysia emerges as the most AI-ready market in the region, with very high "Useful" ratings (65-75%) across all suggestion types. Malaysian shoppers appear genuinely enthusiastic about algorithmic assistance that enhances their shopping experience.

In Singapore and Hong Kong, the response is more discerning. While "Useful" scores remain healthy (50-55%), there is a clear preference for suggestions that offer financial ("Cheaper swap") or physical ("Healthier/allergen-safe swap") protection.

The limit of acceptance in Singapore is reached when AI tries to plan meals. "Menu options" is the least valued feature in Singapore, with only 36.1% finding it useful, a stark contrast to Malaysia's 69.9%. This suggests that Singaporean consumers want AI to serve as an efficient assistant, not a lifestyle coach.

The value exchange: Cashback is king

If retailers want access to the more sensitive data tiers, the currency of exchange is non-negotiable: cashback.

When asked what benefit would make them most willing to share data, "Cashback into wallet" is the clear winner across all three markets. In Hong Kong, a large 61.1% of shoppers cite this as their main motivator, nearly eight times higher than "Lower delivery fees" (7.8%).

Singapore (46.0%) and Malaysia (42.3%) also prioritize direct financial return above all else. Interestingly, “Greener/eco routing” ranks last in every market (2-7%), confirming that while sustainability is a nice-to-have, it is not a strong enough currency to buy personal data.

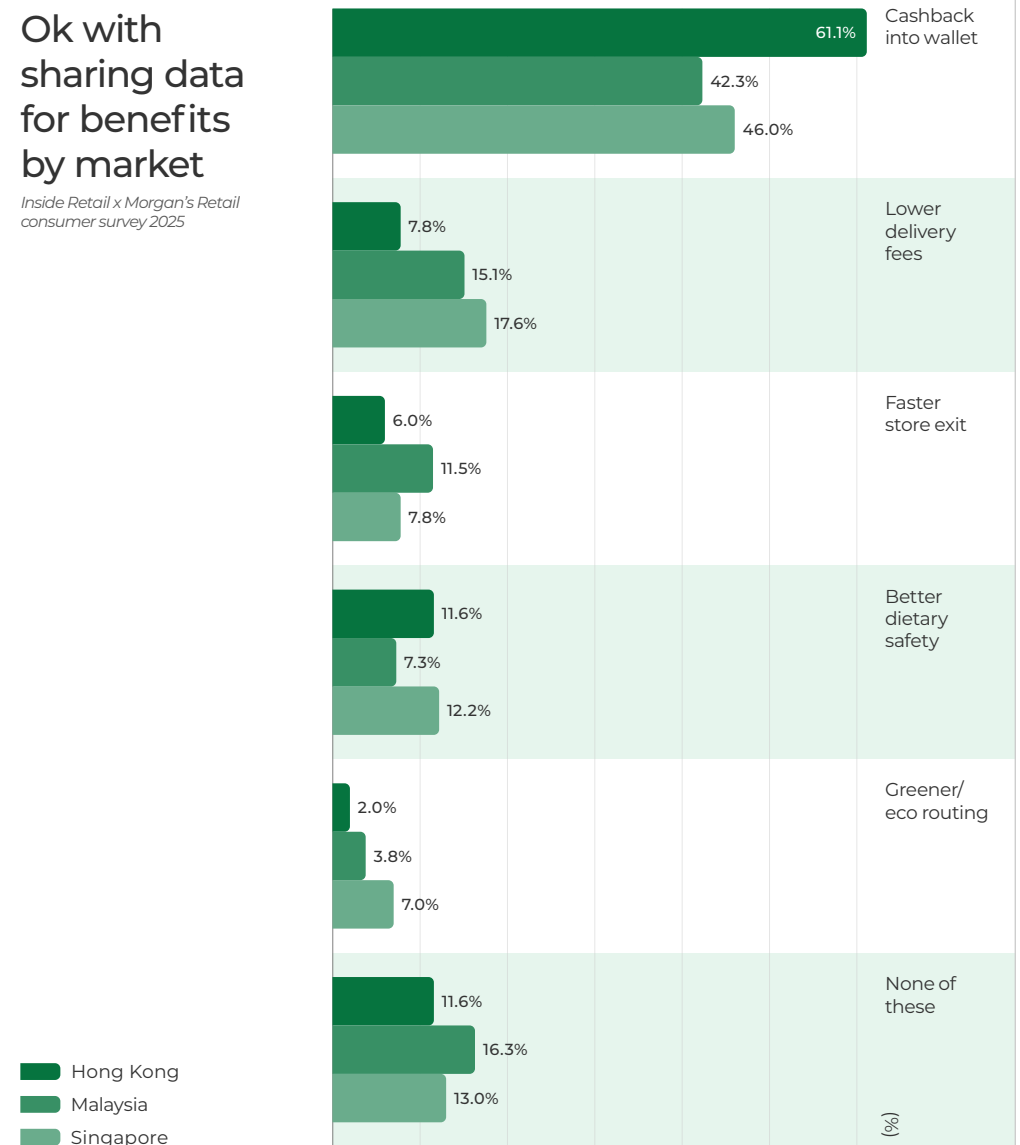
For loyalty program design, this is a vital insight. Points, badges, and eco-credits are weak motivators for data sharing. The only lever that consistently makes a difference is direct, visible financial benefit.

In a cost-of-living squeeze, data must pay shoppers back

The data and AI rulebook for the region is grounded in practicality. Shoppers in Singapore, Hong Kong, and Malaysia are comfortable with retailers tracking their purchases and in-store locations, as this data improves the efficiency they value. However, they are much less at ease with retailers probing their personal details (such as household size) or other shopping habits. To bridge this gap, retailers need to go beyond vague promises of better experiences and offer a real value exchange. In a high-cost-of-living environment, the only data strategy that truly works is one that benefits the shopper directly.

Ok with sharing data for benefits by market

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On the clock

What shoppers really
expect from delivery

Delivery is the ultimate test of the retailer's promise, and in the region, the definition of "on time" is becoming ruthlessly unforgiving. The data shows a region divided by speed: Malaysia wants it quick and is willing to pay; Hong Kong prefers free delivery and is happy to wait.

The speed divide: Malaysia races, Hong Kong waits

When asked to balance speed against cost, the markets differ significantly. Malaysia clearly stands out as the 'speed market' in the region. A total of 72.9% of Malaysian shoppers prefer a paid, quick option (under 45 mins or same day) over a free, slower one. This readiness to pay for convenience matches the Shop and Drop enthusiasm seen earlier. Malaysian shoppers value their time and are willing to pay for it.

Hong Kong is at the opposite end. It is the 'value market,' where 68.9% of shoppers choose a free, slower delivery window (Next day or 2-3 days). Despite the city's quick pace, its high density of retail options means that if a Hong Kong shopper wants something now, they can probably get it

downstairs. Delivery is, therefore, mainly used for planned, bulk replenishment, where cost savings matter more than speed.

Singapore tends towards value, with 55.6% favoring free and slow options, while a notable 34.3% are happy to pay a small fee for same-day service. This highlights the sweet spot for Singaporean logistics: not necessarily instant, but definitely today.

The credibility gap: Do they believe the promise?

Retailers making bold speed promises face a skeptical audience. When asked how believable a "45-minute delivery" promise is, most shoppers across all markets (49-56%) remain undecided, rating it only "Somewhat believable."

Hong Kong shoppers are the most skeptical, with only 21.2% finding the promise highly believable (Very/Completely). This skepticism probably stems from the logistical reality of city traffic, high-rises and elevators, which make a 45-minute window incredibly ambitious.

Speed vs. cost preference by market

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- <45 min (paid)
- Same day (fee)
- Next day
- 2-3 days

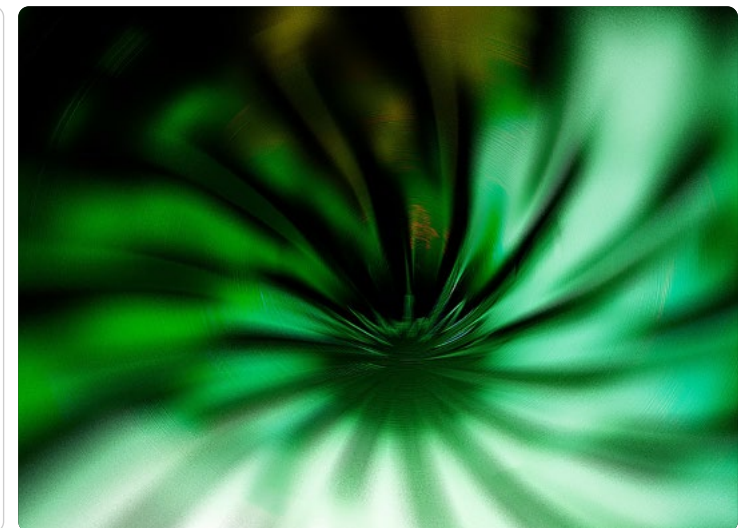
Singapore



Malaysia



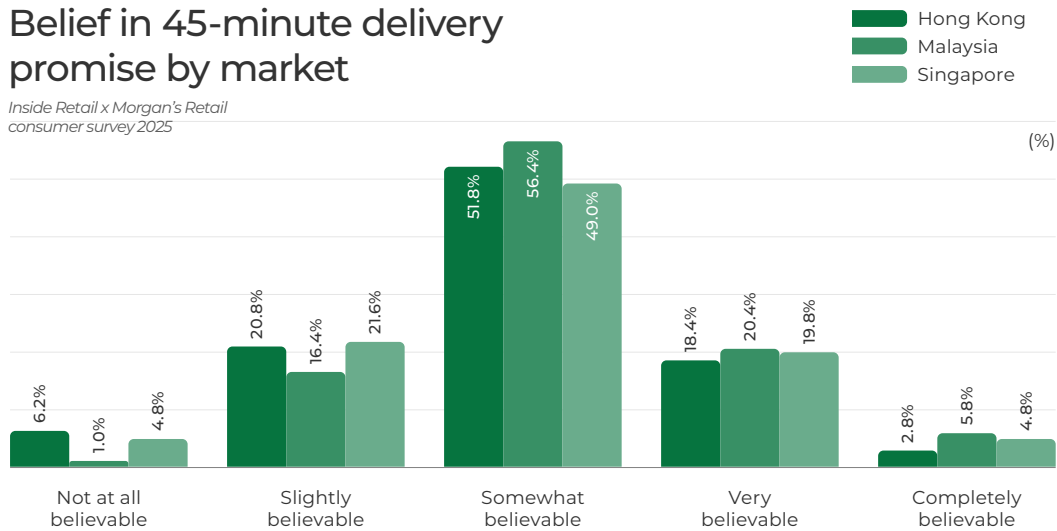
Hong Kong



**KEY ASIAN
GROCERY
MARKETS
EDITION**

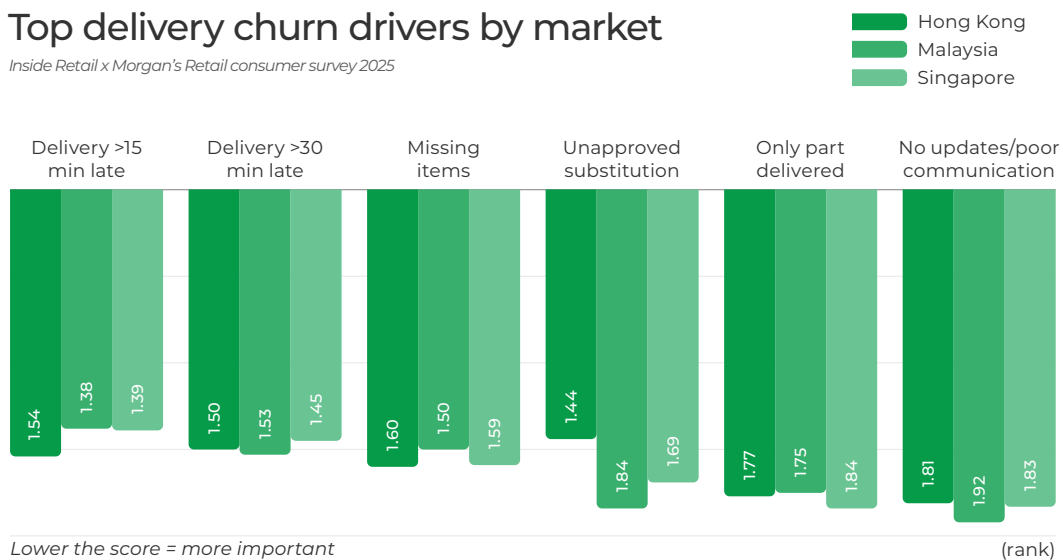
Belief in 45-minute delivery promise by market

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Top delivery churn drivers by market

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Malaysia and Singapore are slightly more optimistic (26.2% and 24.6% highly believe, respectively). Still, the overarching sentiment is “prove it.” For retailers, this means marketing a 45-minute promise may be less effective than simply demonstrating reliability over time. Trust must be earned on the doorstep, not the billboard.

The churn drivers: Late is the new never

What leads a shopper to switch their grocery store? The data points to a cluster of critical issues: lateness, unapproved substitutions and incomplete orders.

In Malaysia and Singapore, “Delivery is more than 15 minutes late” is a top reason for cancelling a service. Note the timeframe: 15 minutes. The tolerance for delay has decreased to a quarter of an hour. In the on-demand age, a delivery window is a contract, and missing the target counts as a breach.

In Hong Kong, the focus shifts. The main cause of churn is “Unapproved substitution.” This highlights Hong Kong shoppers’ product and brand preferences: receiving the wrong soy sauce or a different brand of milk is viewed as a critical service failure, arguably more severe than a late delivery.

“Missing items” is a consistently important issue across all markets, often ranking alongside lateness and unapproved substitutions. It is the silent killer of loyalty, forcing customers to return to the store to finish a shop they thought was complete.

The control-freak consumer: Substitution preferences

The data on substitution handling reinforces a 'control' narrative, especially in the advanced markets of Singapore and Hong Kong.

In Singapore (76.4%) and Hong Kong (76.2%), three-quarters of shoppers insist on approving a substitution before it occurs. They prefer a digital nudge, like a push notification asking 'Is this OK?', rather than the picker making a guess.




Malaysia, once again, shows a different character. Here, 35.1% of shoppers are happy with "Auto-match with price protection," nearly double the rate in Singapore (18.7%) and triple that in Hong Kong (12.2%). This indicates Malaysian shoppers are more trusting of the retailer's choice, provided they aren't financially penalized for it.

Pay for speed or wait for perfection? Key Asian Grocery Markets's split delivery standards

Delivery in the region operates on two different time standards. Malaysia follows fast time, where shoppers pay for quick service and penalise lateness. Hong Kong follows "quality time," where shoppers are willing to wait for free delivery but expect absolute accuracy in their orders. Singapore balances both, demanding same-day efficiency with zero substitution errors. For retailers, the operational lesson is clear: in Malaysia, invest in drivers; in Hong Kong, invest in pickers. And in all markets, never, ever be more than 15 minutes late.

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Preferred substitution handling by market

Auto-match 
Approve first 
Never 

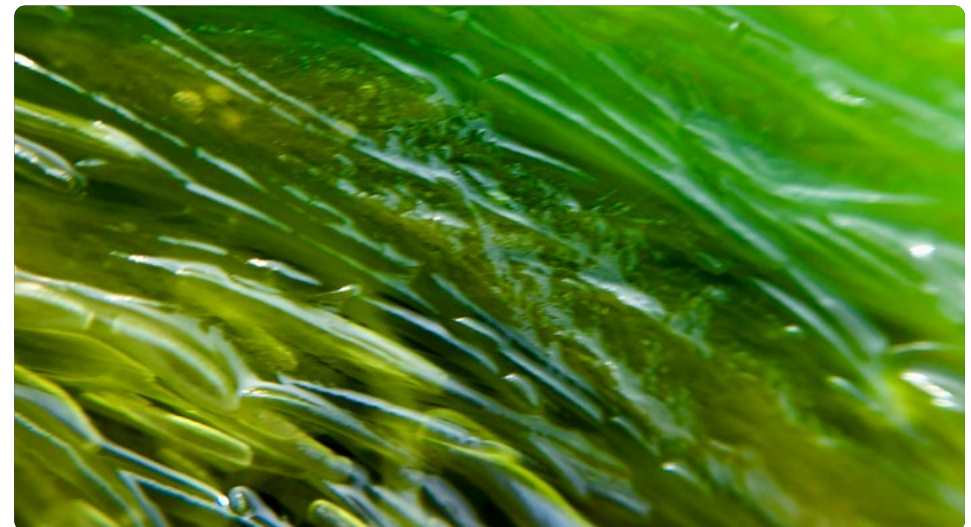
Hong Kong



Malaysia



Singapore

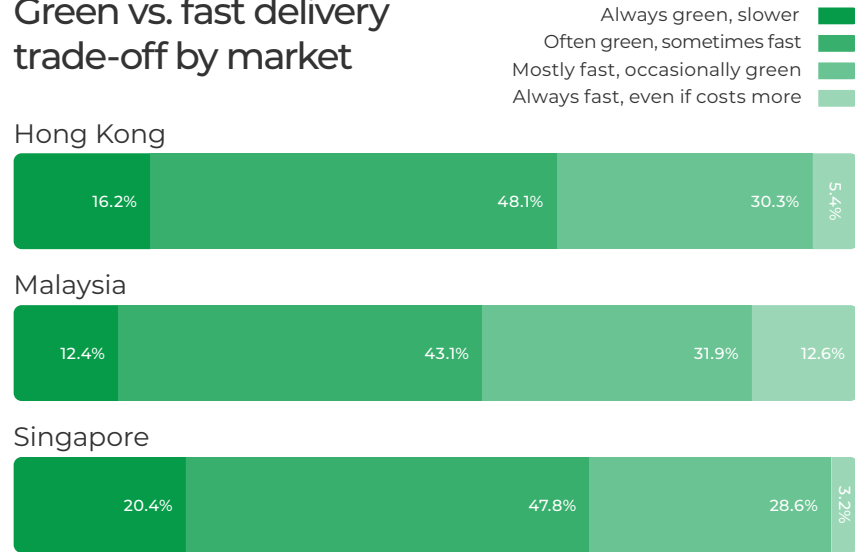


Speed, waste and responsibility

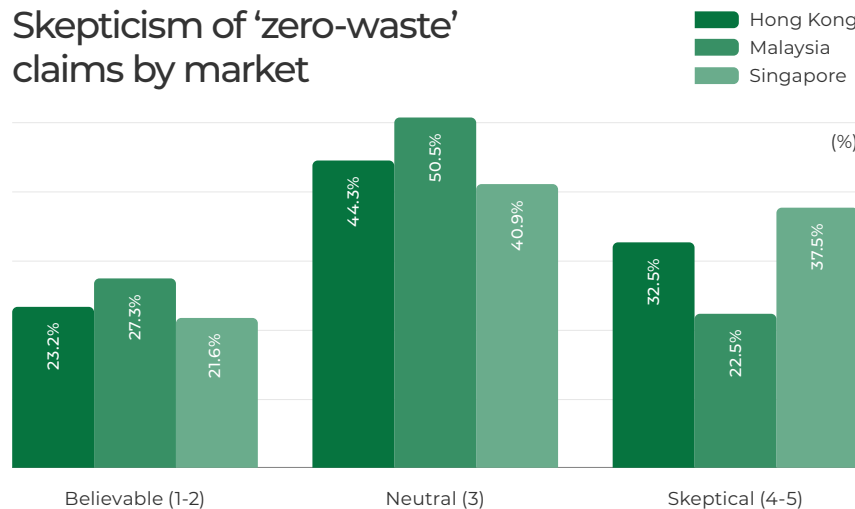
The grocery sustainability contract

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Green vs. fast delivery trade-off by market



Skepticism of 'zero-waste' claims by market



Sustainability in Key Asian Grocery Markets is a complex balance of intent versus action. While shoppers across Singapore, Hong Kong, and Malaysia show a clear preference for greener choices, this desire often conflicts with the realities of cost and convenience. The data reveals a practical 'green contract': Shoppers are willing to switch brands for sustainability, but they are largely reluctant to pay extra for it. Furthermore, credibility is limited; shoppers are skeptical of retailer claims and look to the government, not the brand, for validation.

The trade-off: Green intentions vs. fast reality

When faced with a choice between "slower, green delivery" and "faster, paid delivery," most shoppers in Singapore (68.2%) and Hong Kong (64.3%) prefer the green option. This indicates that in these mature markets, the green choice is also seen as the value choice because slower delivery is often free or less expensive, enabling shoppers to support their environmental values while saving money.

Malaysia shows a different profile. While most (55.5%) still select green, 44.5% prioritize speed, with 12.6% choosing "Always fast, even if it costs more." This matches the "speed culture" noted in Section 6, where Malaysian shoppers see time savings as the main currency.

The cynicism pitfall: 'Zero-waste' claims face scrutiny

Retailer sustainability claims face a tough crowd. When asked how believable a "zero-waste" or "low-carbon" claim sounds, a substantial part of the market is either neutral or openly doubtful. Singapore is the most skeptical market, with 37.5% of shoppers doubting such claims. Hong Kong follows closely with 32.5% skeptical.

Malaysia seems more trusting, with only 22.2% skepticism and higher belief (27.3%). This skepticism gap between Singapore and Hong Kong presents a challenge for brands: Simply claiming a green credential is no longer enough; it's likely to be met with a greenwashing filter by a third of the customer base.

The price barrier: Willingness to switch, not pay

The limit of green loyalty is defined by price. When asked if they would switch to a sustainable store, the response is overwhelmingly positive - if the price is right.

If the sustainable store is 5% cheaper, the likelihood of switching rises dramatically, to 76.2% in Malaysia and 75.2% in Singapore. Even if the prices were equal, a strong majority in Malaysia (66.3%) and Singapore (62.7%) would still opt to switch.

However, if the sustainable option costs 5% more, support falls apart. Switching intent drops to 24.6% in Singapore and 21.6% in Hong Kong. This exposes the harsh reality for the mass market: Sustainability is a differentiator, not a premium driver. Shoppers expect retailers to include sustainability in the base price, not charge extra for it.

In authority we trust: Government stamp required

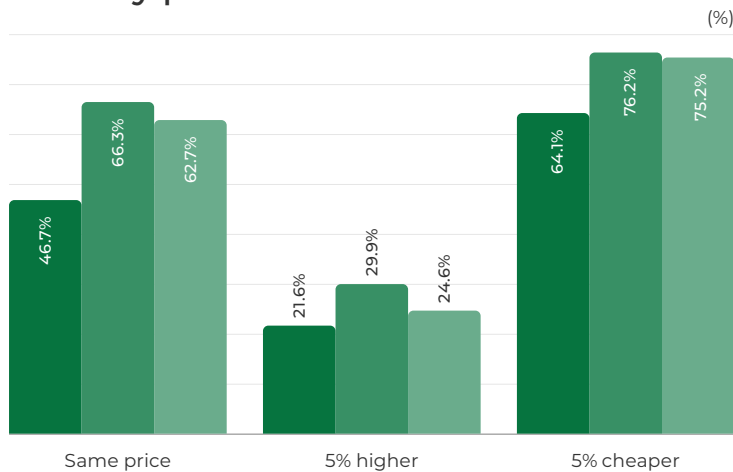
Whom do shoppers trust to verify green claims? Not the retailer. Across all markets, "Government certification" remains the top credibility signal, especially in Singapore (48.6%), where confidence in government institutions is high.

Hong Kong shoppers are the most cynical, with 17.8% saying they trust "None" of the claims, effectively opting out of the credibility debate altogether.

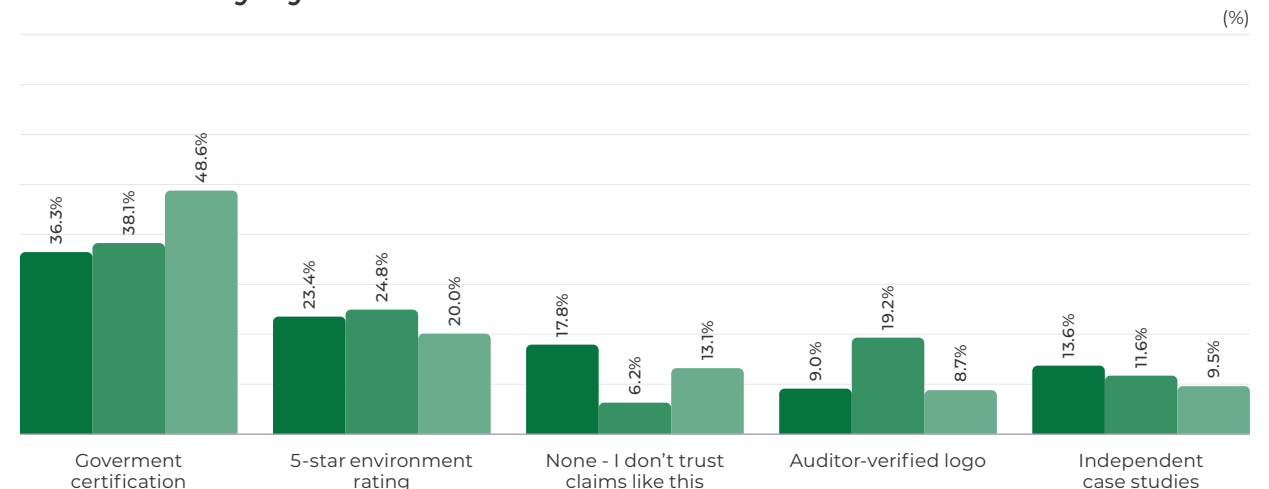
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Hong Kong Malaysia Singapore

Willingness to switch to a sustainable store by price scenario



Credibility signals for sustainability by market





For retailers, this means self-authored badges and internal eco-scores are weak assets. To build genuine trust, brands must align with external, authoritative standards, ideally government-backed ones, rather than marking their own homework.

The green premium is dead: shoppers want cheap, verified sustainability

The sustainability contract in Key Asian Grocery Markets is clear but demanding. Shoppers want to be green, but they expect the retailer to cover the costs and the government to verify the claim. In Singapore and Hong Kong, “green” often acts as a proxy for “free/slow delivery,” letting shoppers feel virtuous while saving money. In Malaysia, speed still competes fiercely with sustainability. Ultimately, the winning strategy isn’t to ask shoppers to pay for the planet, but to demonstrate that a sustainable supply chain is also efficient and cost-effective. The green premium is dead; the green standard is just beginning.

From Big Shop to 45-minute delivery: The seamless grocery system that shoppers are quietly designing

Across shopping missions, channels, automation, delivery, and sustainability, shoppers in Singapore, Hong Kong, and Malaysia share a clear view of what a successful grocery system should be: It is quick but not hurried, digital but not cold, local but supported by logistics, and intelligent without feeling intrusive.

Design for the hybrid, local mission

Shoppers still organize their behavior around a nearby weekly “Big Shop” (77% of Key Asian Grocery Markets shoppers), but increasingly connect in-store, app, and delivery touchpoints to complete it. This is the exact model that having Scan-and-Go with delivery enables at a local store; customers can plan in the app, execute in-store via Scan-and-Go, and decide whether to carry or hand off to 45-minute delivery at the end. The data confirms roughly one-quarter of shoppers (26% in Singapore, 26% in Hong Kong) already prefer this precise format, with a further 30% open to using it half the time or more.

Build a Scan-and-Go backbone

Across different markets, the trend is clear: Shoppers prefer to scan, click, and go rather than queue, re-scan, and wait. Queue frustration remains the main pain point (65-72% across markets), and Scan-and-Go directly addresses this issue. More than 90% of shoppers are willing to try automated formats, with 75-85% using them weekly. The key to success is reliability; 61% mention scanning issues as their main concern. Retailers should view the store app as a tool for navigation and transactions that makes the Scan-and-Go experience seamless, with exits completed in under two minutes (the expectation of 66.5% of Singaporean shoppers).

Engineer delivery and fulfillment around precision and control

The last mile is no longer just an extra service; it becomes a vital part of building loyalty. The 45-minute delivery window is supported by data: Malaysian households are very willing to pay for speed (24% specifically want delivery in under 45 minutes, 73% want fast-paid options overall), and 64-65% of shoppers across all three markets would use such a service at least half the time. However, the promise must be kept - lateness beyond 15 minutes is the top reason for churn in Malaysia and Singapore. This calls for tighter delivery windows of ± 15 minutes, establishing strong substitution approval processes (76% in Singapore and Hong Kong want prior approval), and positioning “shop-in-store, deliver-to-home” as a smooth extension of the Scan-and-Go experience.

Split the experience by market, not channel

The data reveals three unique market personalities in the region. Malaysia is the speed market, showing the highest willingness to pay for quick delivery, the most enthusiasm for AI features, and the greatest openness to automation, provided staff are visible. Singapore is the precision market, with the highest app adoption, the strictest expectations for exit times, and the lowest tolerance for substitution errors. Hong Kong is the efficiency market, where shoppers are the quickest, baskets are the smallest, and there is the highest sensitivity to inventory accuracy and substitutions. A Scan-and-Go retailer should adapt operations accordingly: Focus on driver networks in Malaysia, prioritize picker accuracy in Hong Kong, and ensure a frictionless app experience in Singapore.

Make automation and data feel safe, transparent and optional

Shoppers are willing to try Scan-and-Go formats and AI-powered suggestions (more than 90% willingness to try), but nearly half feel uneasy if they cannot see how to get help or where their data is used. The most effective strategy for a Scan-and-Go retailer is having visible staff or a clear Help button (the top reassurance factor, cited by 55% of Key Asian Grocery Markets shoppers), transparent running totals shown on every scan (46% find this reassuring), explicit cashback rewards for sharing data (the main motivator, at 46-61%), and AI focused on practical benefits (cheaper swaps, complementary items) rather than lifestyle prediction.

Bury friction and waste in the same move

The biggest everyday frustrations, long queues (66%), finding products (35%), and managing substitutions (29%), are precisely the issues a well-implemented Scan-and-Go system can resolve. In-app wayfinding improves discoverability, real-time basket visibility helps prevent overbuying, Scan-and-Go cuts queues, and a 45-minute delivery eases the burden of carrying. These operational upgrades also meet sustainability expectations: 64-68% of shoppers in Singapore and Hong Kong prefer green delivery when it's either free or a slower option, allowing retailers to batch deliveries for efficiency without losing most customers.

More at
morgan's

Data used in this report was collated from a survey of 1500 primary shoppers within Key Asian Grocery Markets. Respondent criteria were strictly limited to active household purchasers to ensure high data relevance and quality.

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