

Poised for Growth: *Understanding Consumers across Asia & the Pacific and how to Connect with them*



The Speakers



Dixit Sapra

*APAC Lead – Consumer
Insights & Demand*

Eric Wagatha

*Global Trends &
Syndication Leader
NielsenIQ*



*The world we
live in is getting
more turbulent*



When crisis is the only constant, the hindsight from trends becomes the powerful foresight to transform brands

Recognizing and reconciling these trends into opportunities



Introducing NIQ Consumer Life 2025

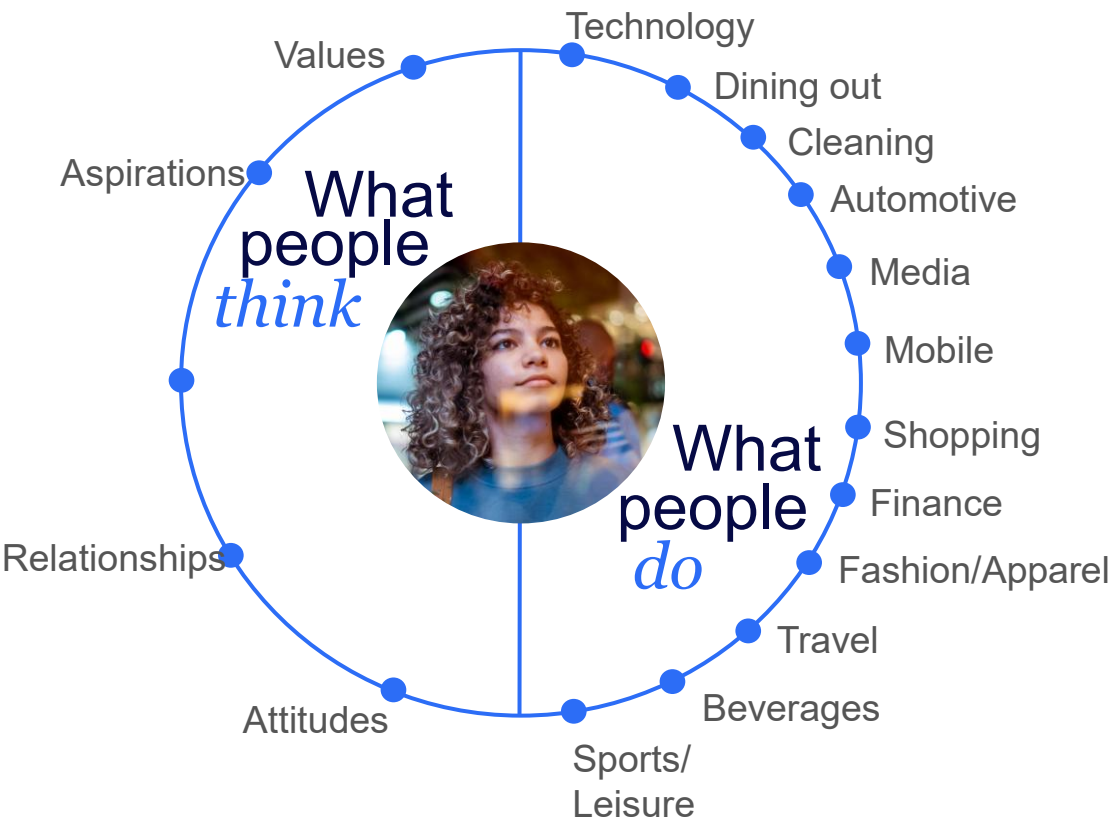
Tracking the trends that lead
to transactions since 1997

The Consumer Life Reports
Worldwide™ global annual survey
is the longest-running study
projecting how life evolves across
40 global markets

40 Markets				
Argentina	Colombia	Indonesia	Netherlands	South Korea
Australia	Croatia	Italy	Peru	Spain
Austria	Ecuador	Japan	Poland	Switzerland
Belgium	Egypt	Kazakhstan	Russia	Thailand
Brazil	Estonia	Latvia	Saudi Arabia	Turkey
Canada	France	Lithuania	Serbia	UAE
Chile	Germany	Malaysia	Singapore	UK
China	India	Mexico	South Africa	USA

Developed Asia:
Australia, Japan, Singapore, S. Korea

Developing Asia:
China, India, Malaysia, Thailand, Indonesia



In-depth insight into evolving consumer attitudes, values and lifestyles

NIQ Consumer Life helps you succeed with access to powerful regional and market-level data and over 300 Global and Market-level topical reports



Connect with consumer trends



Identify innovation opportunities



Future-proof your strategies



Invest confidently

Today’s content sourced from several of these...

Boomers around the World



NIQ Consumer Life Roper Reports® Global
May 2025

Values of the World

2025 global report



NIQ Consumer Life Roper Reports® Global
September 2025

2025 Mood of the World



NIQ Consumer Life Roper Reports® Global
July 2025

NielsenIQ

© 2025 Nielsen Consumer LLC. All Rights Reserved. Confidential and proprietary.

Gen Z around the World



Millennials around the World



NielsenIQ

Gen X around the World



NIQ Consumer Life Global
April 2025

NielsenIQ

© 2025 Nielsen Consumer LLC. All Rights Reserved. Confidential and proprietary.



Agenda

Build a winning strategy with a consumer-first mindset to guide your marketing and innovation

1

Current consumer mood and financial outlook across Asian markets

2

Explore how personal concerns and shifting values are directly impacting shopping habits and brand connections

3

A first look at generational divides and lifestyle trends redefining the marketplace

A woman with dark hair, wearing a white sleeveless dress and carrying a patterned bag, stands with her back to the camera, looking out over a dense city skyline at night. The skyline is filled with illuminated skyscrapers, with the Empire State Building being a prominent feature in the center. The entire scene is overlaid with a semi-transparent blue filter.

State of the World

GDP growth remains slow | a still-cautious consumer

Expect consumer attention towards value propositions

(Real GDP, annual percent change)	PROJECTIONS		
	2024	2025	2026
World Output	3.3	2.8	3.0
Advanced Economies	1.8	1.4	1.5
United States	2.8	1.8	1.7
Euro Area	0.9	0.8	1.2
Germany	-0.2	0.0	0.9
France	1.1	0.6	1.0
Italy	0.7	0.4	0.8
Spain	3.2	2.5	1.8
Japan	0.1	0.6	0.6
United Kingdom	1.1	1.1	1.4
Canada	1.5	1.4	1.6
Other Advanced Economies	2.2	1.8	2.0
Emerging Market and Developing Economies	4.3	3.7	3.9
Emerging and Developing Asia	5.3	4.5	4.6
China	5.0	4.0	4.0
India	6.5	6.2	6.3
Emerging and Developing Europe	3.4	2.1	2.1
Russia	4.1	1.5	0.9
Latin America and the Caribbean	2.4	2.0	2.4
Brazil	3.4	2.0	2.0
Mexico	1.5	-0.3	1.4
Middle East and Central Asia	2.4	3.0	3.5
Saudi Arabia	1.3	3.0	3.7
Sub-Saharan Africa	4.0	3.8	4.2
Nigeria	3.4	3.0	2.7
South Africa	0.6	1.0	1.3



Amid international trade conflicts and rising geopolitical tensions, world GDP is projected to grow at 2.8%, a decline from 2024 as well as initial estimates in January. A slight recovery (3% growth) is forecast for 2026 as economic shockwaves settle and countries enact new policies to provide stability. However, this still falls below the historical (2000–19) average of 3.7%.

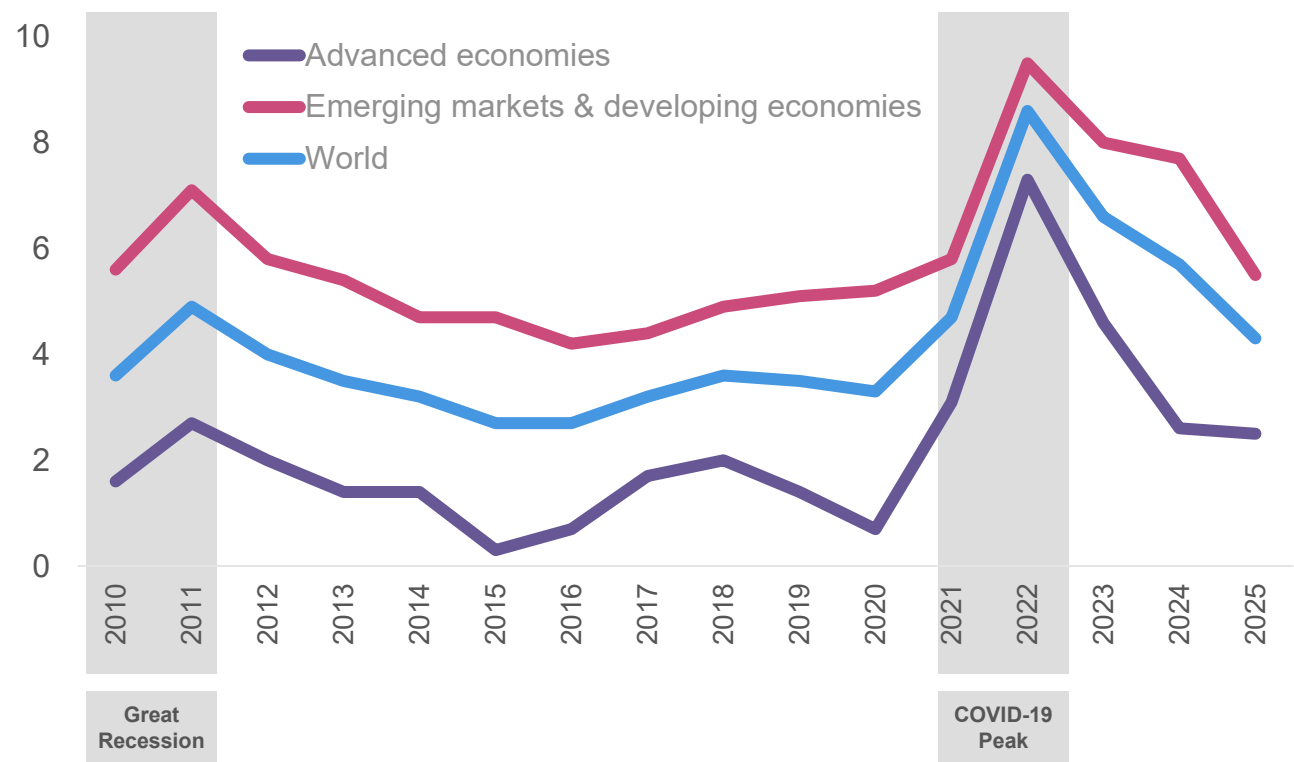
[World Economic Outlook, April 2025: A Critical Juncture Amid Policy Shifts](#)

Varying inflation rates drive consumer caution in emerging and advanced markets

Tariffs across the global economy have caused exacerbated inflation and uncertainty about the future

Consumers are continuing to face challenges despite progress. Inflation has cooled in advanced economies to a more typical 2.3% but remains more than twice as high in emerging markets at 5.5%.

% inflation rate, average consumer prices (annual percent change)



“ In labor markets, hiring has slowed in many countries, and layoffs have risen. Meanwhile, progress on disinflation has mostly stalled, and inflation has edged upward in some cases, with an increasing number of countries exceeding their inflation targets. —IMF, 2025

“ A sharp increase in trade tensions and policy uncertainty is set to drive global growth this year to its slowest pace since 2008, outside of outright global recessions. These headwinds have led to growth forecasts being cut in nearly 70 percent of all economies—across all regions and income groups. —World Bank, 2025

World Economic Outlook, April 2025: A Critical Juncture Amid Policy Shifts; IMF Data Mapper; <https://blogs.worldbank.org/en/developmenttalk/the-global-economy-in-five-charts1>

Across Asia, fundamental issues impacting societies

SOCIAL INEQUALITY IN THAILAND

BREAKING DOWN STIGMAS AROUND MENTAL ILLNESS: THE CRISIS CARE OF SOUTH KOREA

SOUTH CHINA SEA TENSIONS

AGING AND POPULATION CRISIS IN CHINA AND JAPAN

77% OF MALAYSIAN STRUGGLE WITH LIVING COST, SAYS CFI

CLIMATE AND DEFORESTATION CONCERNS IN INDONESIA

INDIA'S EXPORTS TO US PLUNGE AS TRUMP'S 50% TARIFFS BITE, BBC

SCAM VICTIMS IN SINGAPORE LOST \$456M IN FIRST HALF OF 2025 – THE STRAITS TIMES



Advancements in technology and healthcare bring hope for a brighter future

AI holds promise as well as dangers as adoption grows



Artificial intelligence (AI) is rapidly reshaping labor markets, transforming the way individuals work, communicate, and solve complex problems.

—IMF, 2025



Advancements in medicine and healthcare have led to longer lifespans and better quality of life



Artificial intelligence is increasing worker productivity and allowing people to focus on more complex or creative tasks



But AI's environmental impact has come under greater scrutiny as climate change continues to exacerbate severe weather events



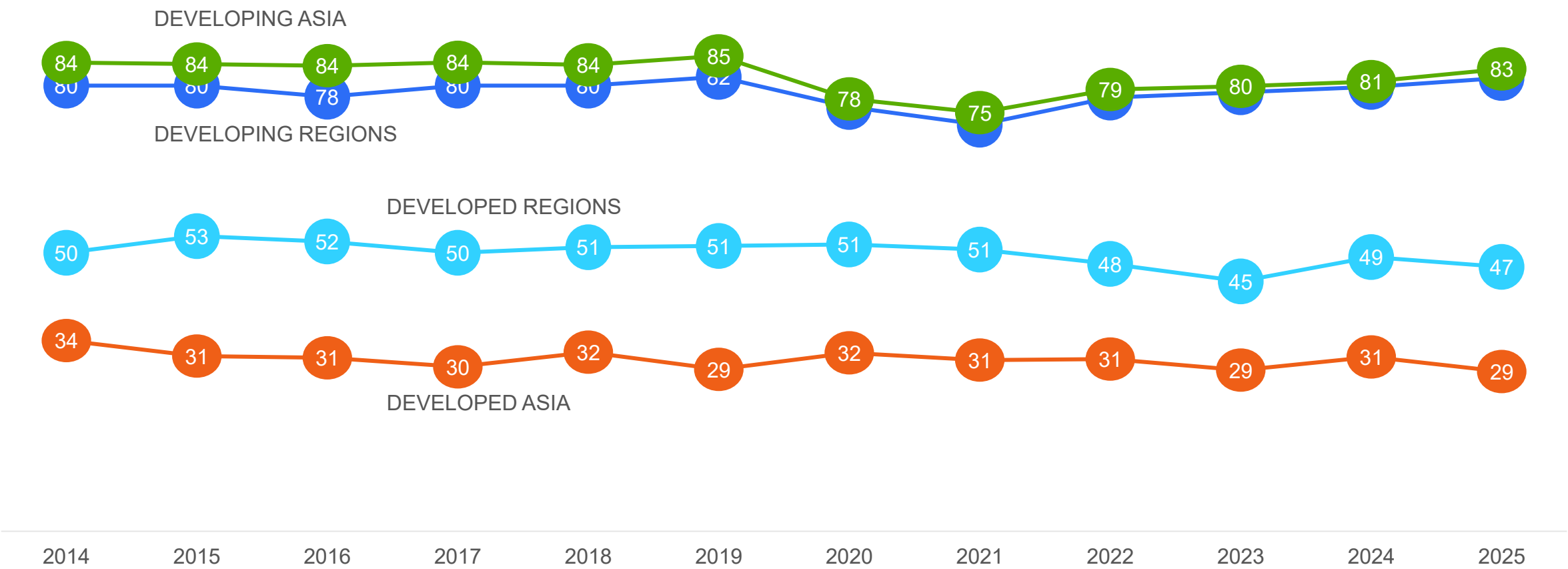
The consumer mood

People's confidence, hopes, and concerns

Consumers' economic confidence has risen in developing regions, continuing a 4-year trend

Confidence has declined in developed regions, flat in Developed Asia

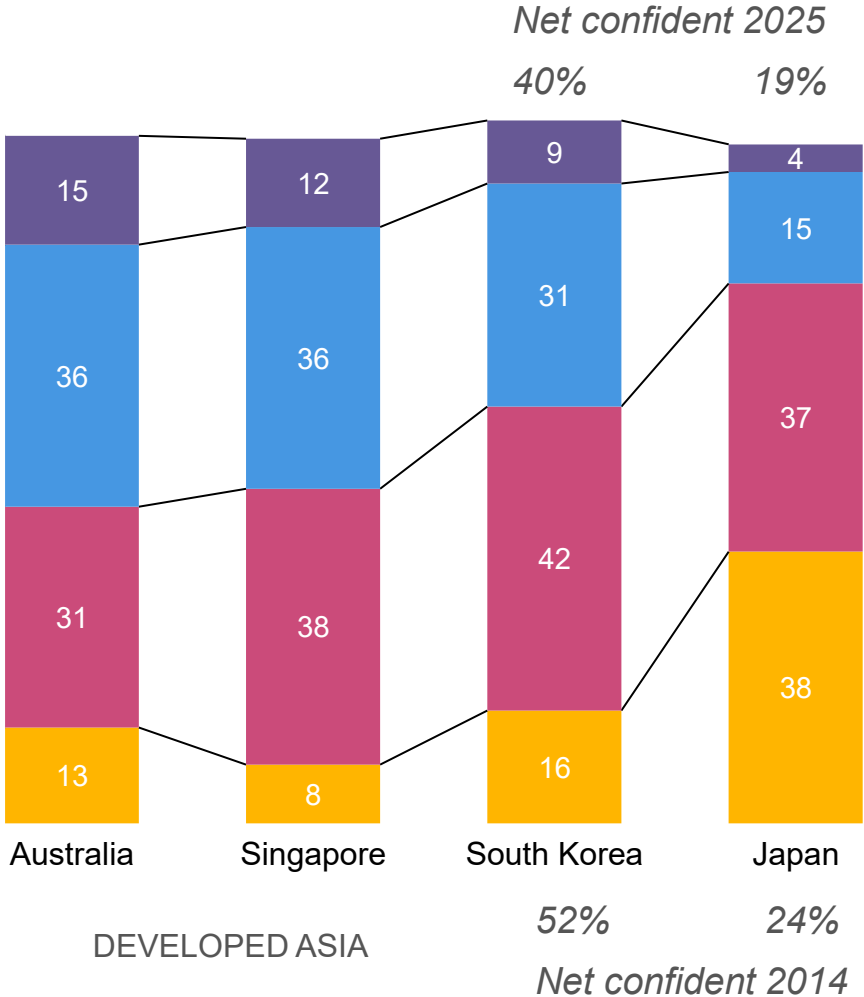
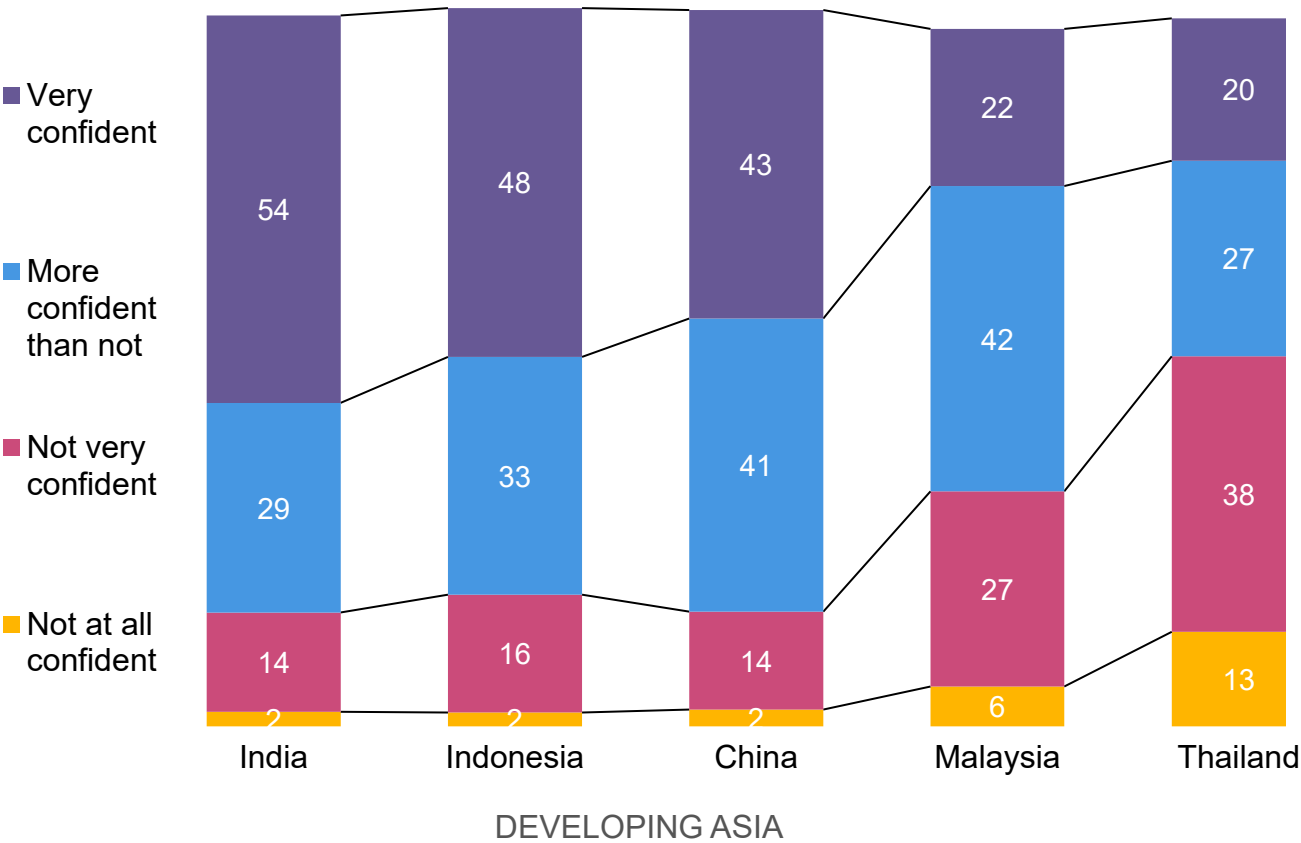
% who are very confident/more confident than not that they will be personally better off in 12 months



NIQ Consumer Life Global 2025, A1 (global = 18 core countries asked in all years); Developed regions = North America, Western Europe, Baltic States, and Developed Asia; Developing regions = Latin America, Central/Eastern Europe, Middle East/Africa, and Developing Asia

Marketers need to recognize that confidence is not uniform within the region

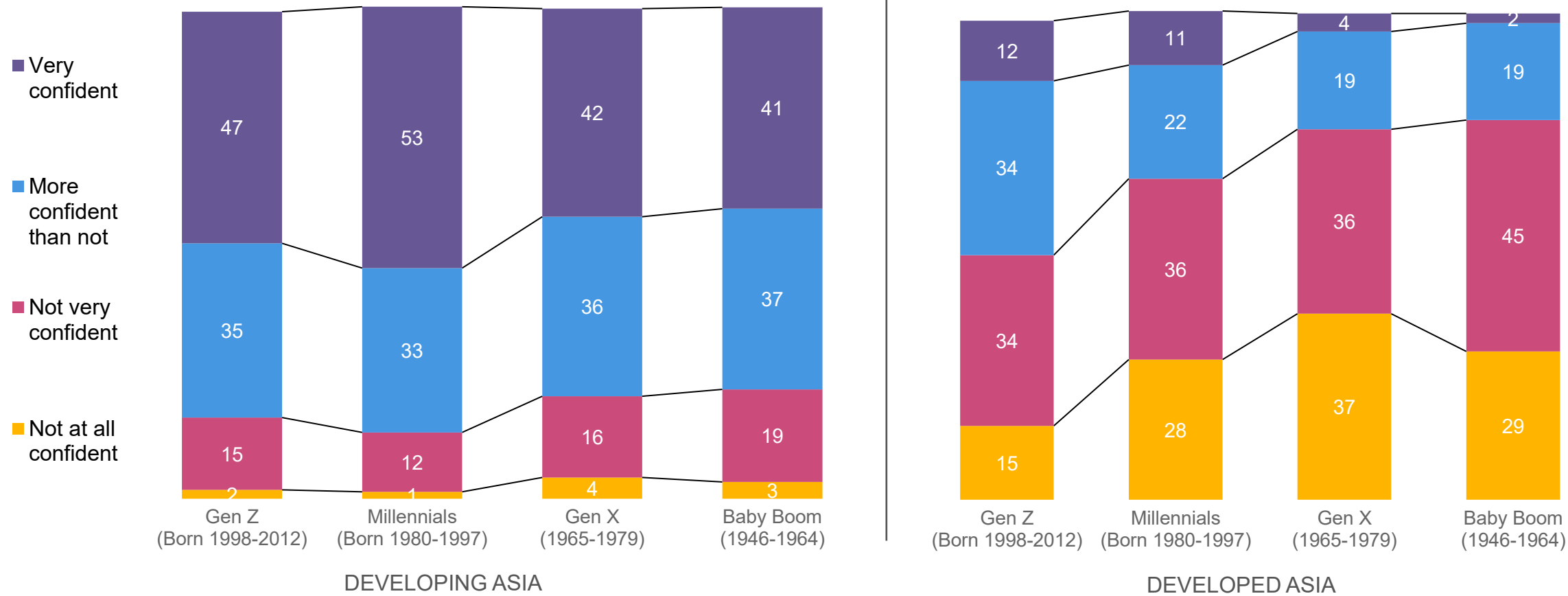
% distribution by **level of confidence** that will be personally better off in 12 months



Confidence favors youth, particularly in developing Asia

Driven by growth opportunities and the benefit of time

% distribution by **level of confidence** that will be personally better off in 12 months



Inflation, money, and global warming are among top concerns in both Developed and Developing Asia

Different hot buttons based on prevailing social issues (eg, pensions, pollution, education)

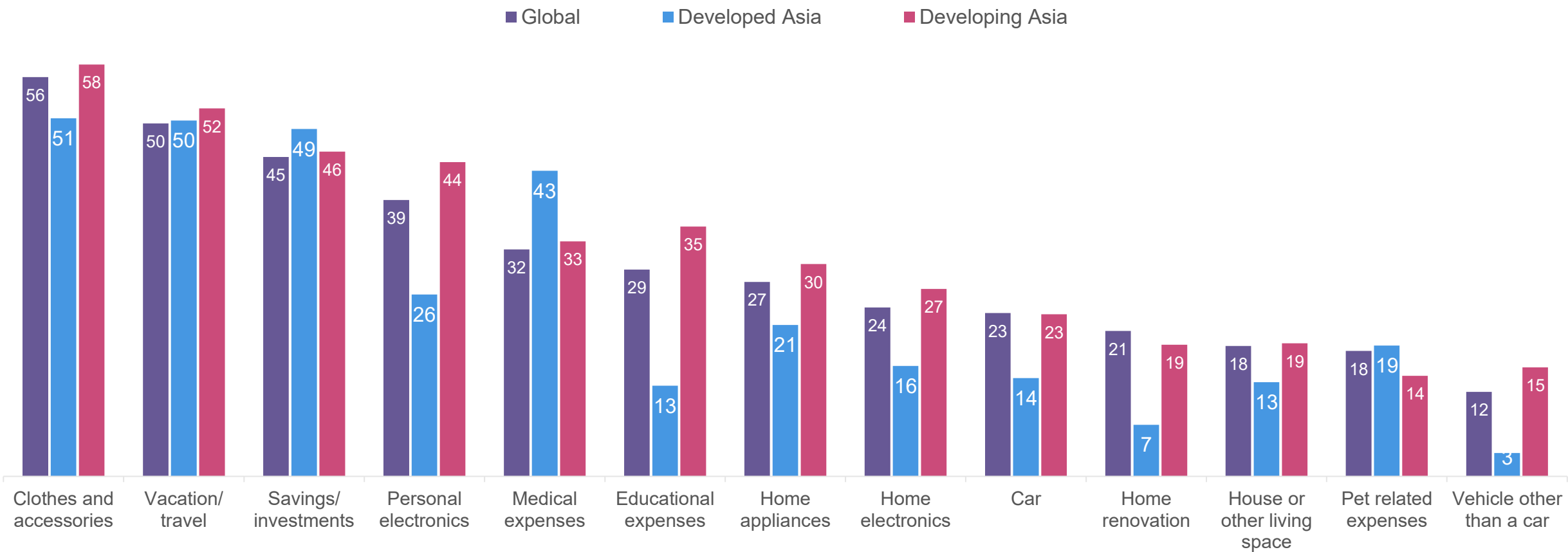
Rank of personal concerns	Developed Asia	Developing Asia
Inflation and high prices	#1	#1
Money enough to live right and pay the bills	2	4
Global climate change / Global warming	3	5
Recession and unemployment	4	2
Cost of healthcare	5	7
The future of the retirement or pension plans provided by our government	6	15
Economic inequality in my country	7	8
Misinformation presented as fact (e.g. fake news, propaganda)	8	14
Crime and lawlessness	9	11
Wrong-doing by / corruption of elected government officials	10	12
Environmental pollution	11	3
Personal information getting into the wrong hands	12	10

Rank of personal concerns	Developed Asia	Developing Asia
Pandemics (epidemics that spread across the world)	#13	#9
Trade restrictions impacting my country	14	19
Immigration	15	24
Relations with foreign countries	16	22
Rise of authoritarian regimes around the world	17	21
Educational quality	18	6
Gender inequality	19	17
Religious extremism / fundamentalism	20	16
The impact of technology on society	21	12
Drug abuse	22	20
Terrorism	23	18
Relations between racial and ethnic groups	24	23

Consumer mood will impact spending priorities | Clothes, travel, electronics

Constraints on wallet include intent to save, and medical and educational costs

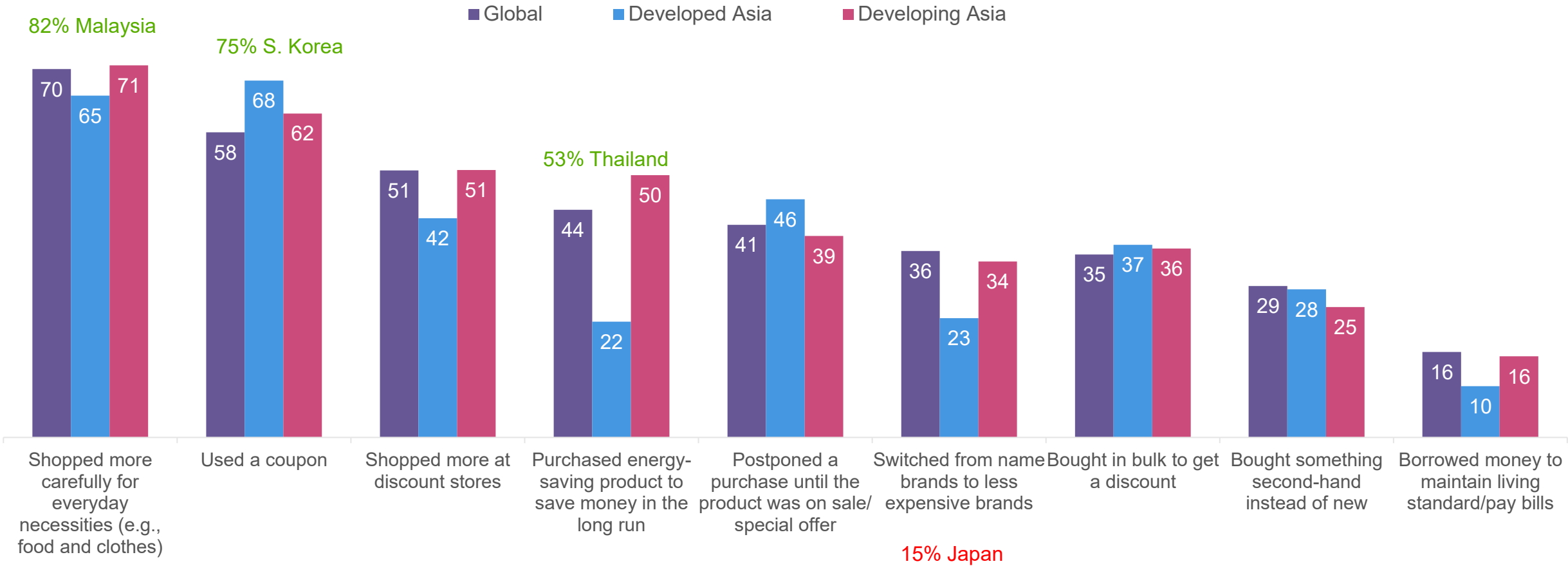
% who **plan to spend on things** in the next 12 months



NIQ Consumer Life Global 2025, K15 (global = 36 countries)

Different focus in shopping strategies as Asians seek to save money

% who have done money-saving shopping activities in the past year



NIQ Consumer Life Global 2025, B38 (global = 36 countries)

A high-angle, slightly blurred photograph of a woman with dark hair in a ponytail, wearing a pink t-shirt and a denim skirt, pushing a metal shopping cart. The cart is filled with various groceries, including canned goods, a bag of green vegetables, and several bottles. She is walking on a brick-paved path. The entire image is overlaid with a semi-transparent dark blue filter. The title text is centered over the image.

Mindset Shift | Personal Values

Why personal values?



Guiding principles
beyond demographics



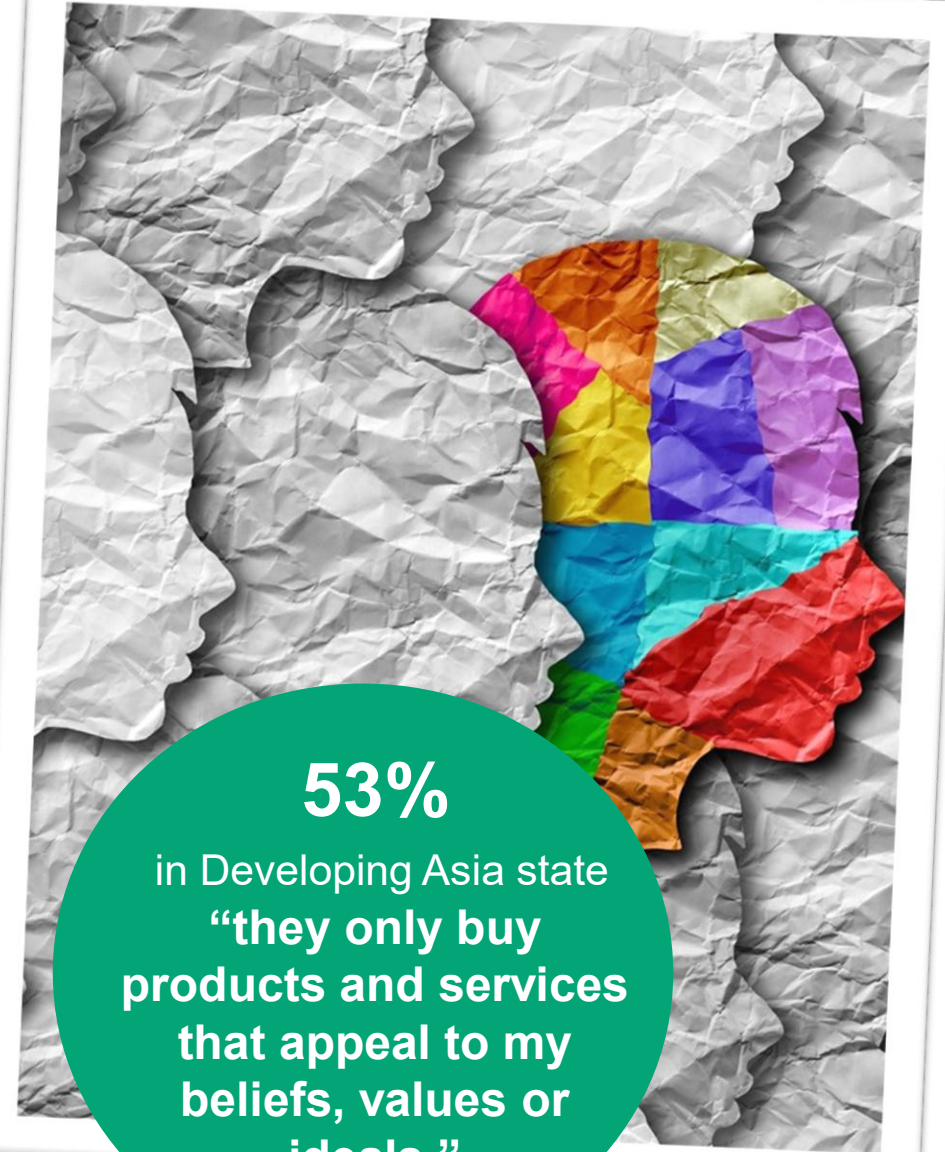
Grounding innovation
at a deeper level



Stronger messaging
connections



Differentiation &
portfolio management



Personal Values at NIQ Consumer Life

Measuring 57 globally-recognized values yearly since 1997

Global 2025

ValueScope™:
Discrete values
found in every
culture around the
world and covering
the spectrum of
human
experience

Rank	Personal value
#1	Protecting the family
2	Honesty
3	Health and fitness
4	Authenticity
5	Self-esteem
6	Self-reliance
7	Freedom
8	Enjoying life
9	Material security
10	Knowledge
11	Stable personal relationships
12	Learning
13	Working hard
14	Duty
15	Equality
16	Friendship
17	Perseverance
18	Open-mindedness
19	Having fun

Rank	Personal value
#20	Spirituality
21	Respecting ancestors
22	Fulfilling work
23	Preserving the environment
24	Enduring love
25	Thrift
26	Social tolerance
27	Simplicity
28	Helpfulness
29	Creativity
30	Being in tune with nature
31	Curiosity
32	Modesty
33	Patriotism
34	Being youthful
35	Leisure
36	Faith
37	Social responsibility
38	Ambition

Rank	Personal value
#39	Wealth
40	Being enterprising
41	Beauty
42	Cultural purity
43	Tradition
44	Pleasure
45	Retribution
46	Romance
47	Excitement
48	Looking good
49	Sex
50	Internationalism
51	Individuality
52	Traditional gender roles
53	Status
54	Social recognition
55	Self-interest
56	Adventure
57	Power

Broadly Actionable

ValueScope™ offers a range of analytical tools to garner insights about the mindset of consumers worldwide. It provides marketers and strategists with ground-breaking tools for identifying opportunities, creating effective strategies, and aligning brands for long-term competitive advantage.

57 Values into Five Values Archetypes

Aspirers

are busy and successful, yet on the verge of insecurity. Brands may help them feel better, especially if they appeal to people's self-image as go-getters.

Elementals

are selfless and domestic, the antithesis of Aspirers and Indulgents. Their caregiving nature extends to the environment, too.

Mindfuls

are people who are dedicated to living life well. This involves taking care of their physical and emotional health and their families.

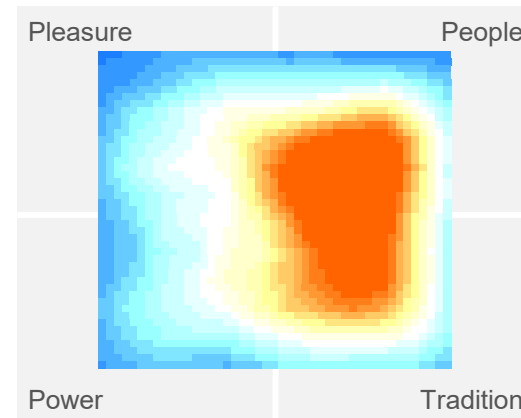
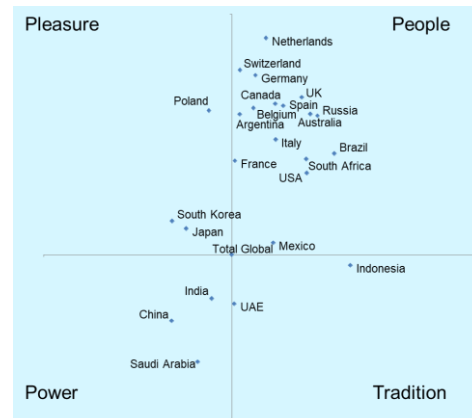
Discoverers

are ethical explorers, open to everything the world has to offer. They appreciate nature, cultures, and people, and are concerned about treating them well.

Indulgents

are self-centered pleasure-seekers who aren't too worried about anyone else. As long as they have the money they need to play, they're happy.

Position and heat maps



Values Position and heat maps provide a quick and visual understanding of where target consumers fall into the values space.

Values can reveal differences

Where demographics do not

Daniel the
Aspirer

Jorge the
Mindful

Cost of healthcare &
future of govt.
retirement plans

Drinks all types of
alcoholic beverages

Uses paid music
streaming services

Expects luxury
vehicles to be
prestigious

Personal
concerns

Food/
beverage

Entertainment

Automotive

Climate change and
impact of tech on
society

Drinks beer

Uses free music
streaming services

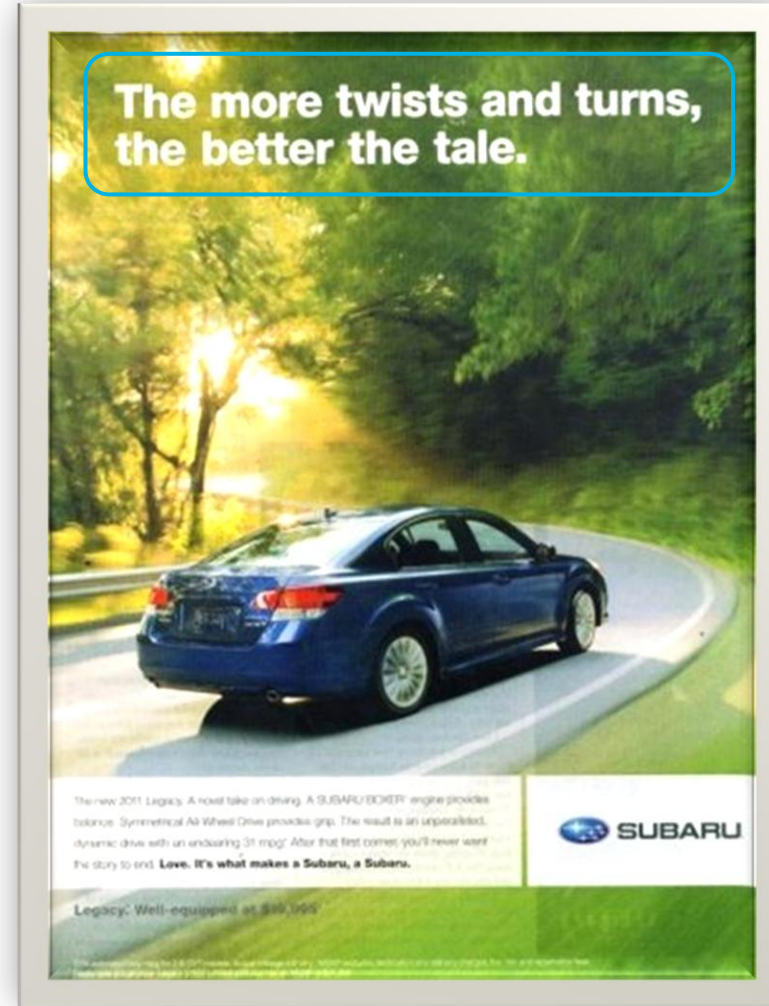
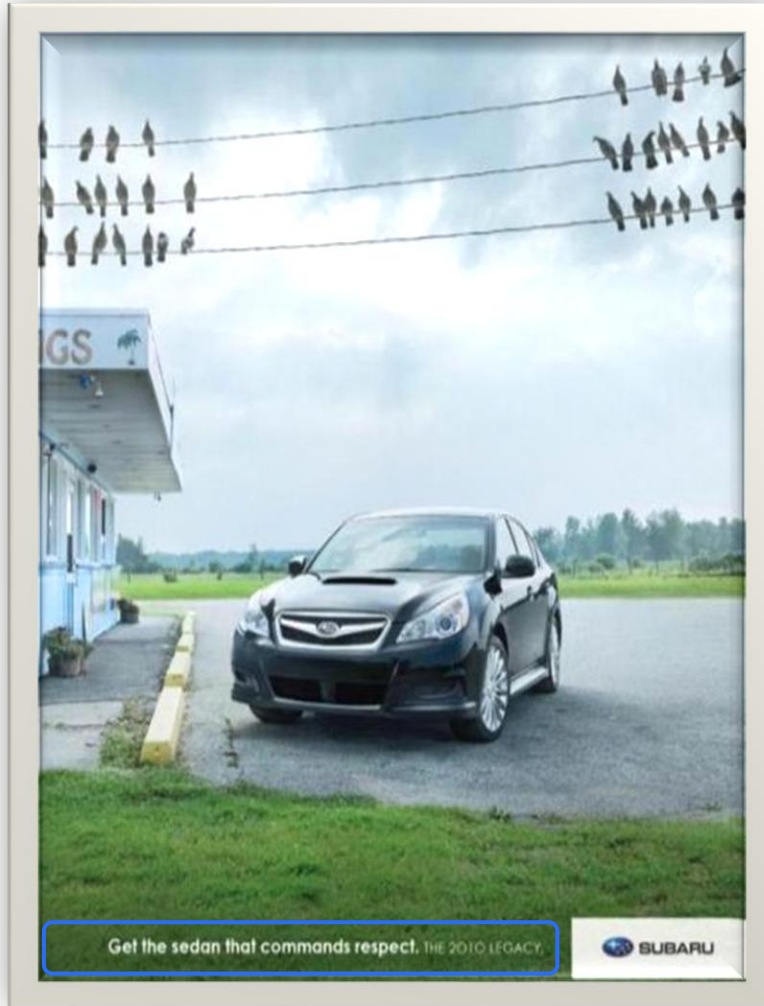
Expects luxury
vehicles to be eco-
friendly

Values impact messaging

Align one brand with two distinct values types

Aspirers

“Get the sedan that commands respect”



Indulgers

“The more twists and turns, the better the tale”

Values impact target and positioning

Tap into cultural differences across markets

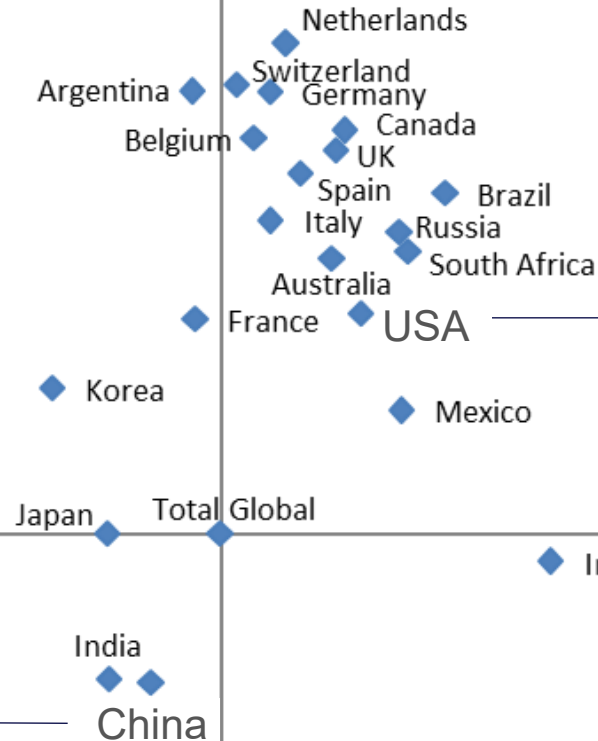


Amazon Kindle commercial in **China** portrays knowledge-seeking professionals who have 'made it.'



Pleasure

People



Amazon Kindle commercial in the **US** portrays leisure readers on the beach while showing support for gay marriage.



Power

Tradition

Today | The world's top values tend to remain consistent over time

And they are widely embraced around the world

- Today's top-10 global values have been mostly stable for the past few years
- 8 of them are currently on the top-10 list in more than half of markets

		Top-10 globally in:	2025 top-10 in:
#1	Protecting the family	All years 2020-2025	All 40 countries
2	Honesty	All years	39 countries
3	Health and fitness	All years	18 countries
4	Authenticity	All years	34 countries
5	Self-esteem	All years	27 countries
6	Self-reliance	All years	31 countries
7	Freedom	2020, 2024, and 2025	35 countries
8	Knowledge	All years except 2020	13 countries
9	Enjoying life	All years except 2023	28 countries
10	Material security	2025 only	25 countries

Material security rose 6 ranks to replace **Stable personal relationships** in the top 10 in 2025, likely fueled by persistent inflation and consumers' cost-of-living concerns

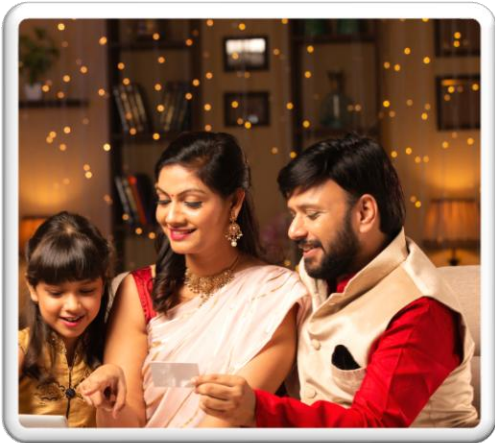
NIQ Consumer Life Global 2020-25, C1 (global = 18 countries)

Shared and unique values priorities across Asian

Reflect established economies and development of middle class



Developed Asia		Developing Asia	
#1	Material Security	#1	Protecting the family
2	Protecting the family	2	Honesty
3	Enjoying life	3	Health and fitness
4	Having fun	4	Self-esteem
5	Leisure	5	Authenticity
6	Health and fitness	6	Knowledge
7	Freedom	7	Duty
8	Honesty	8	Self-reliance
9	Spirituality	9	Working hard
10	Stable personal relationships	10	Enjoying life
		#11	Material Security



NIQ Consumer Life Global 2025, C1 (global = 40 countries)

Developing Asia and Latin America have seen more values shifts than other regions

Thrift and **Material security** are the only values up in all five regions; **Retribution** is up in four, and **Cultural purity**, **Spirituality**, **Simplicity**, and **Health and fitness** are up in three

Changes of 3+ values ranks 2020-2025

Developing Asia	Latin America	North America	Western Europe	Developed Asia
Material security (+20 ranks)	Material security (+19 ranks)	Health and fitness (+7 ranks)	Retribution (+9 ranks)	Retribution (+9 ranks ranks)
Wealth (+11)	Health and fitness (+11)	Thrift (+6)	Material security (+6)	Cultural purity (+5)
Cultural purity (+9)	Simplicity (+8)	Material security (+6)	Simplicity (+6)	Simplicity (+4)
Knowledge (+8)	Retribution (+7)	Traditional gender roles (+5)	Respecting ancestors (+6)	Thrift (+4)
Enjoying life (+8)	Faith (+7)	Ambition (+5)	Thrift (+5)	Material security (+3)
Having fun (+7)	Traditional gender roles (+5)	Retribution (+3)	Tradition (+4)	Wealth (+3)
Tradition (+6)	Thrift (+4)	Spirituality (+3)	Health and fitness (+4)	Equality (+3)
Freedom (+6)	Enduring love (+4)	Faith (+3)	Cultural purity (+3)	
Spirituality (+5)	Spirituality (+3)	Beauty (+3)	Modesty (+3)	
Thrift (+4)	Respecting ancestors (+3)			
Equality (+4)	Fulfilling work (+3)			
Status (+3)	Ambition (+3)			
Pleasure (+3)				
Looking good (+3)				
Fulfilling work (+3)				



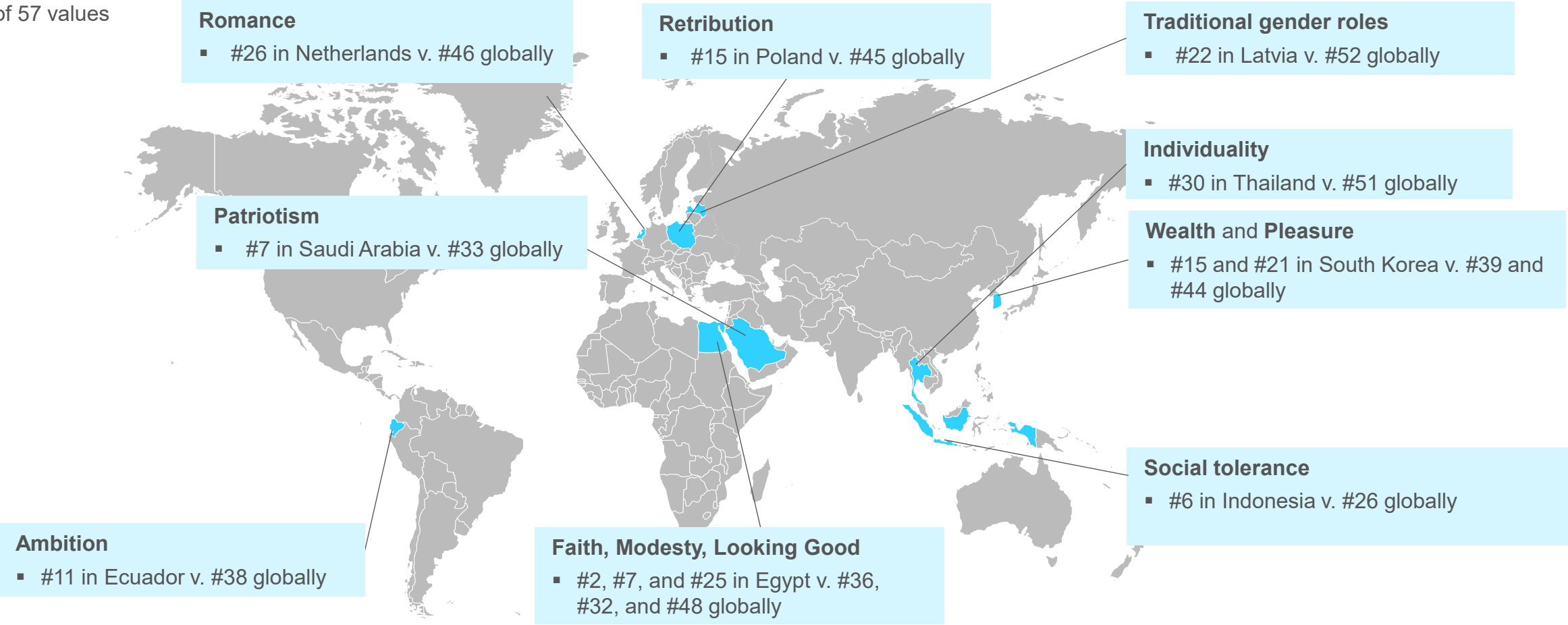
No value is **down** 3+ ranks in all regions since 2020. **Internationalism** and **Helpfulness** are down in four out of five regions, and **Adventure**, **Curiosity**, **Sex**, **Social tolerance**, **Friendship**, and **Preserving the environment** are down in three.

NIQ Consumer Life Global 2020 and 2025, C1 (global = 18 countries)

Niche values are concentrated in Asia and the Middle East

Few stand out in the West

Rank out of 57 values



A photograph of a multi-generational family sitting together on a couch. On the left, an older man with white hair is smiling, holding a young child in a patterned shirt. Next to him is a young woman with long dark hair, also smiling. To her right is a woman wearing a hijab and red-rimmed glasses, leaning her head against the young woman. On the far right is another woman wearing a light blue hijab and a patterned batik jacket, looking towards the others. The background is a simple indoor setting with a window and some furniture. The entire image has a dark blue overlay.

Unpacking Generations

Generational studies guide strategy for today & tomorrow

*Today's
Decision*



Portfolio strategy



Targeting and communication



*Tomorrow's
Decision*



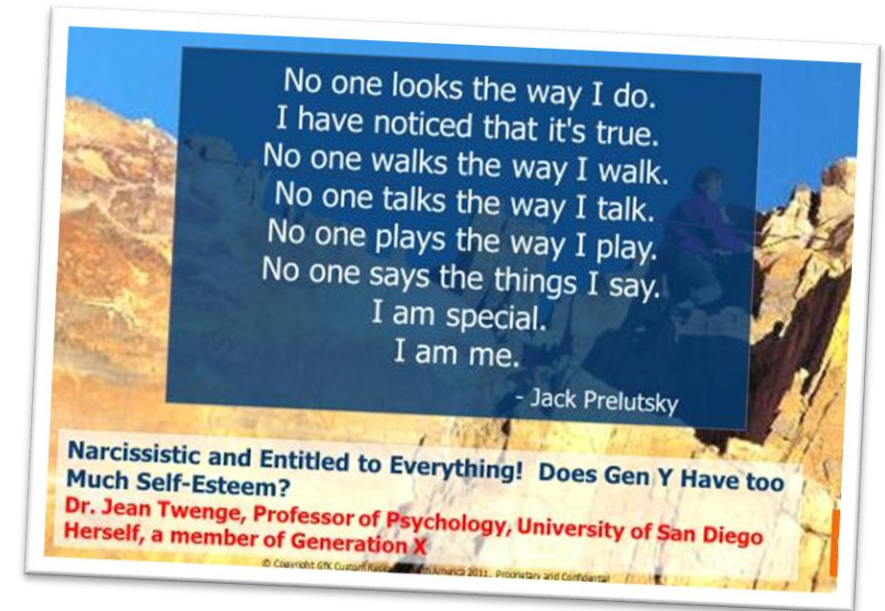
Innovation



Future products and services

Applying generations

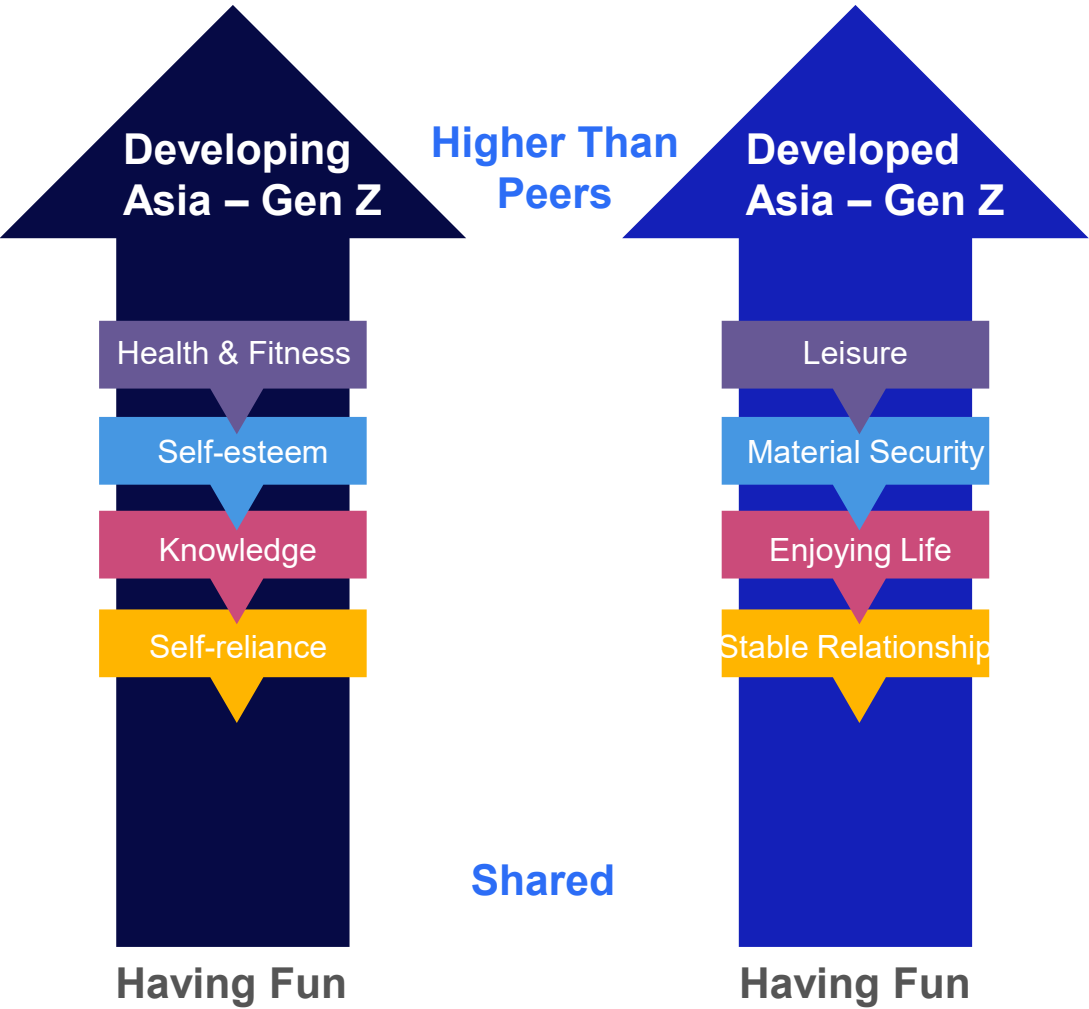
Reconciling growing diversity with finite resources



**But generations are not
monolithic**

Generations are not monoliths | Regional differences exist

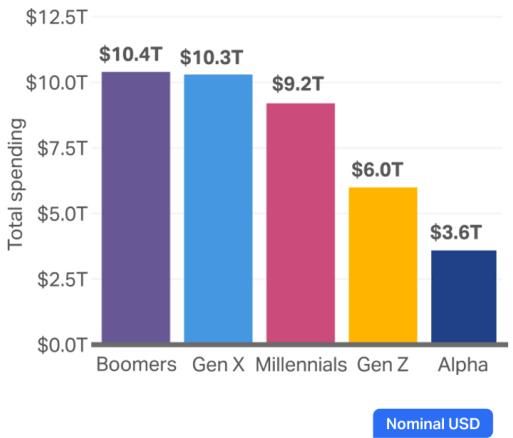
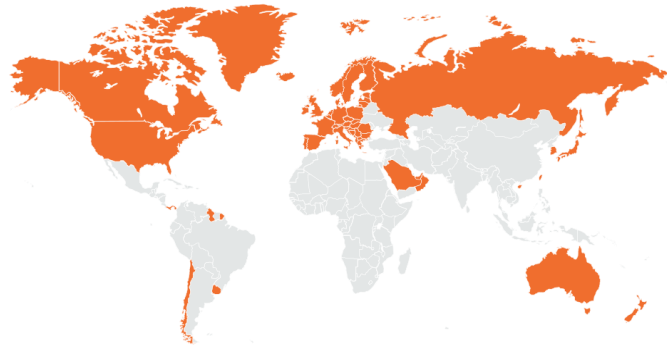
In values and in spending influence



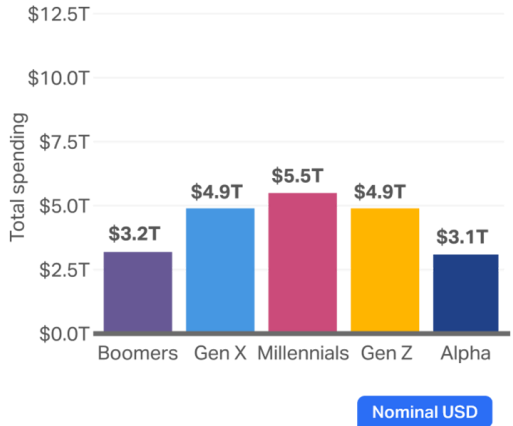
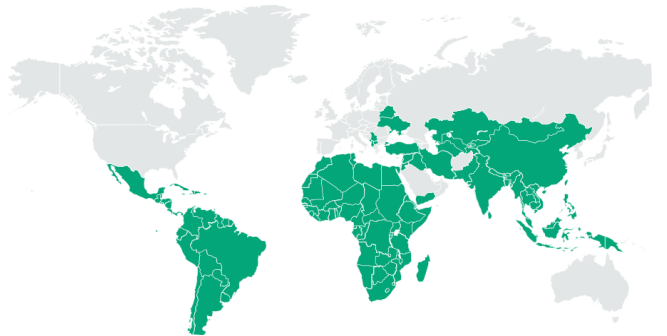
NIQ Consumer Life Global 2025, C1, Source: World Data Lab

Generational spending: A tale of two worlds (2025)

High-income countries



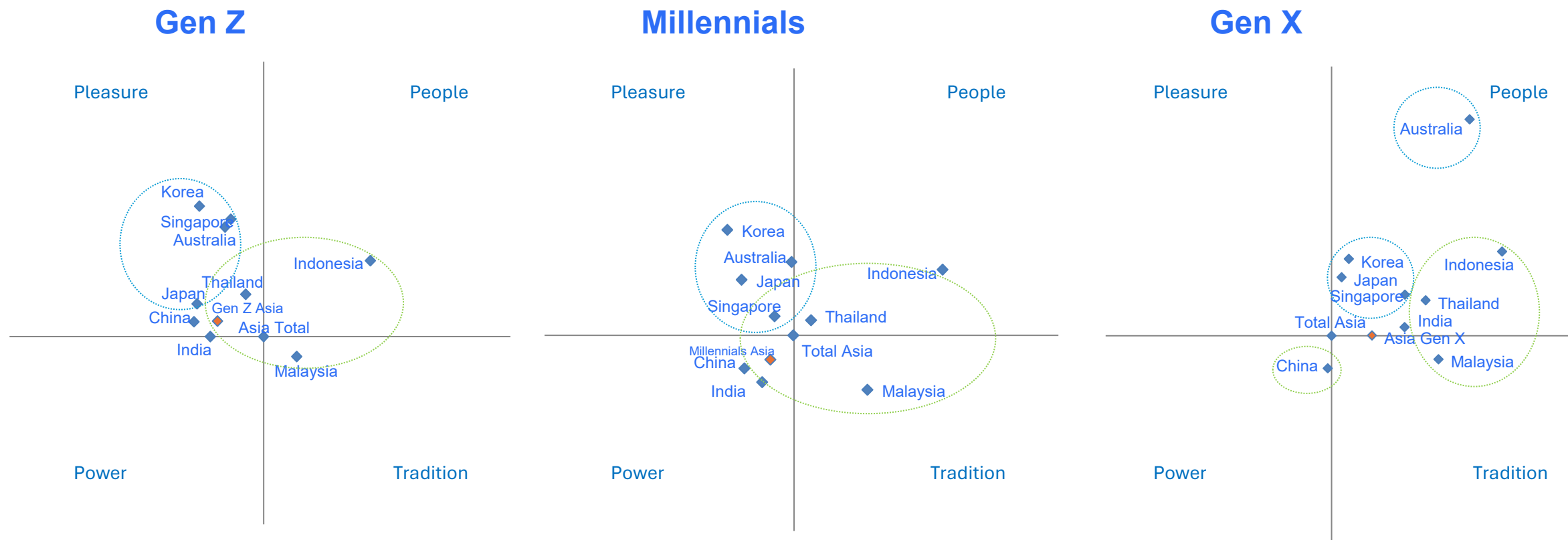
Low- and middle-income countries



Source: World Data Lab

Generational values can align more with outside markets than within

Reconcile “one size” fits all regional marketing may not be ideal



Today | A snapshot generations in Asia

	 Gen Z	 Millennials	 Gen X	 Boomers/Traditionalists
Ages Range	13-27	28-45	46-60	61-79
Birth Year	1998-2012	1980-1997	1965-1979	1946-1965

Gen Z



1 in 2, Students



1 in 3, Young Single

NIQ Consumer Life Global 2025, A02 and ATLs Indexed

Generation Z in Asia

What's on their mind, and what they are looking for

Developed Asia

#3
Wrong-doing by
government officials
#13
Gender inequality

144
I buy products tailored to my needs
126
The look, feel and smell of a product
is very important to me

Developing Asia

#2
Educational quality
#11
Gender inequality

125
I buy products tailored to my needs
113
Price is most important in decision-
making

Millennials



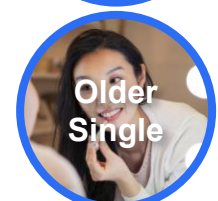
Couples
with Kids

29%

In Developed
Asia

72%

In Developing
Asia



Older
Single

1 in 3

In Developed
Asia

9%

In Developing
Asia

NIQ Consumer Life Global 2025, A02 and ATLS Indexed

Millennials | Engines of the Asian economy

Family first, but don't forget about me

Developed Asia

#4

Economic inequality

144

It is important to indulge or pamper
myself on a regular basis

109

It's better to buy well-known brands
for quality

Developing Asia

#11

Future of retirement/
pension plans

#17

Impact of trade restrictions

120

I buy products tailored to my needs

113

I am prepared to pay more for products
that make my life easier

Gen X



Older
Singles

42%

In Developed
Asia

10%

In Developing
Asia

With
Children

17%

In Developed
Asia

38%

In Developing
Asia

Gen X | The Gen X Decade

Deepest pockets, yet conspicuous consumers

Developed Asia

#12
Personal information
getting into wrong hands

171

Price is the most important factor in
my purchasing decisions

163

I spend quite a lot of time
researching brands before making a
major purchase

Developing Asia

#9
Wrong-doing by
government officials
#7
Economic inequality

137

For me the most important thing about a
brand is that it offers good value for money

125

I prefer to own fewer but higher quality items
(e.g., clothes, technology products)

Boomers/ Traditionalist



Boomers | Resolute and opportunistic

Focused on aging issues, while open to better solutions

Developed Asia

- #2
Climate change
- #3
Cost of healthcare

211

If I'm not satisfied with a product or service, I will choose an alternative

200

For me the most important thing about a brand is that it offers good value for money

Developing Asia

- #3
Cost of healthcare
- #9
Misinformation/ "fake news"

135

I am always looking for ways to simplify my life

133

If I'm not satisfied with a product or service, I will choose an alternative

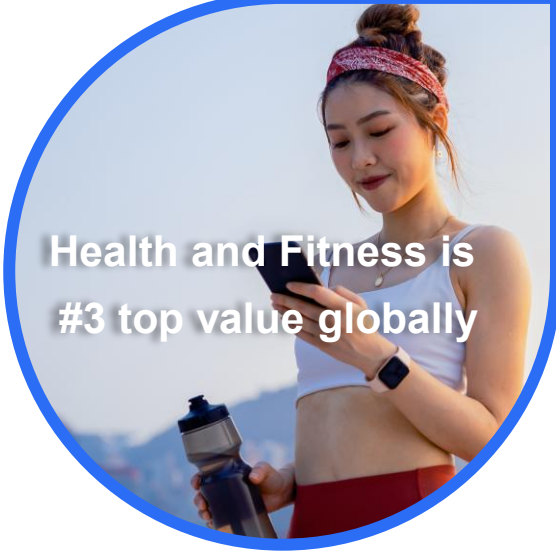
A person is shown from the chest up, holding chopsticks and lifting a portion of bean sprouts from a bowl. The background is blurred, showing a dining table with various Korean dishes, including a large metal pot (likely for Kimchi Jjigae) and several small side dishes (banchan). The entire image has a dark blue overlay.

Wellbeing | Food & Diet

Drivers of wellbeing

Economics aside, consensus on physical and mental health

areas of life where changes would most improve your wellbeing



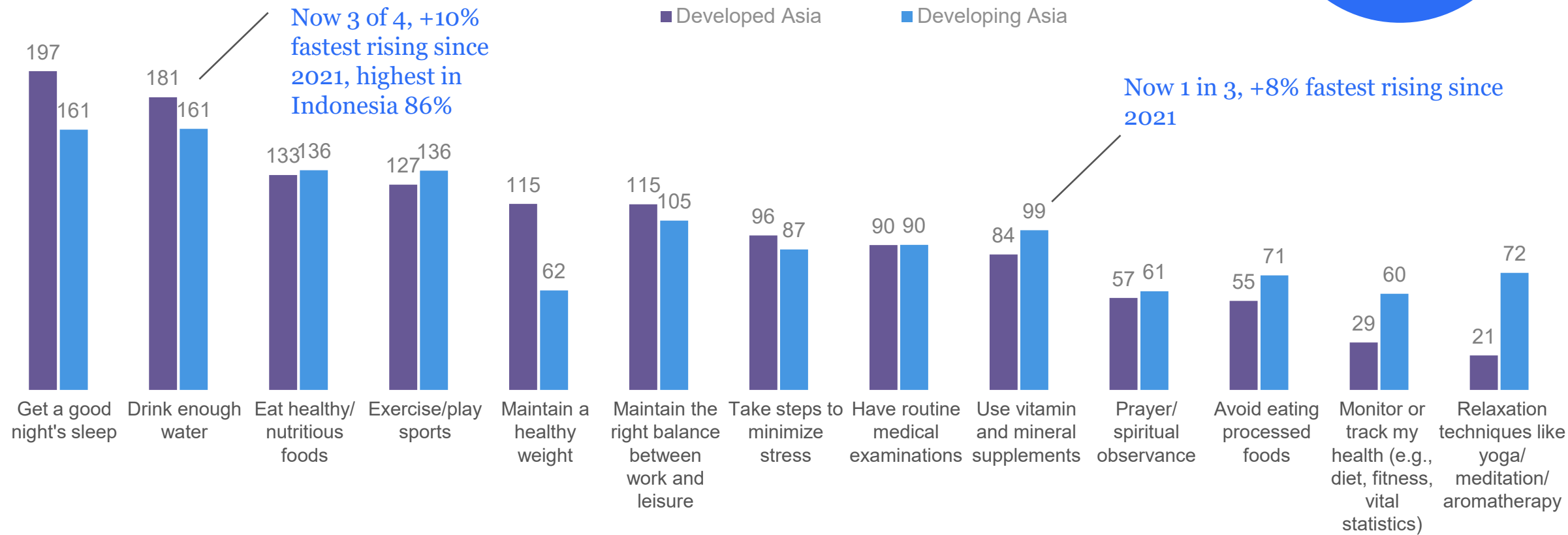
Health and Fitness is
#3 top value globally

Eating healthy ranks #3 among factors important to wellbeing

All behaviors have increased or unchanged since 2021

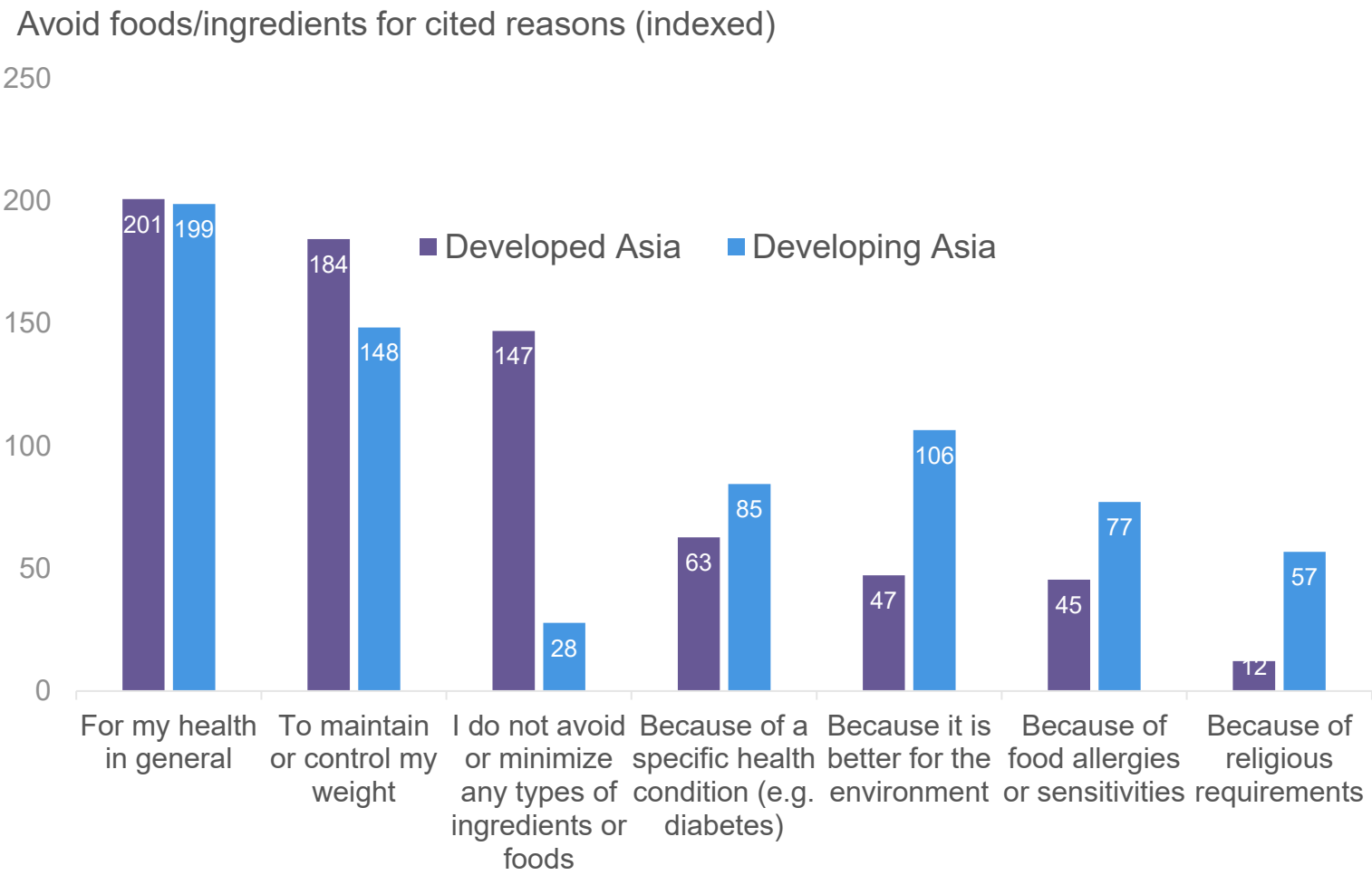
10-point gap
between
caring and
doing

Activities often do for personal health and wellbeing (indexed)



Health and weight are top motivations to avoid foods or ingredients

Sustainability and religious requirements also play a role for developing Asia

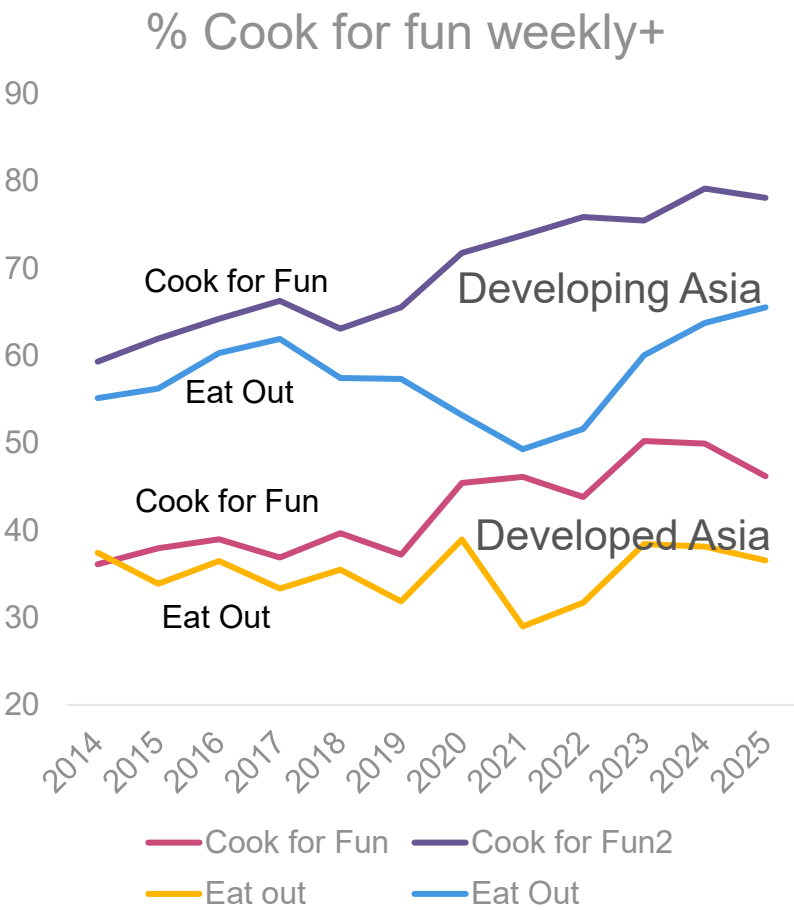


NIQ Consumer Life Global 2024, F28

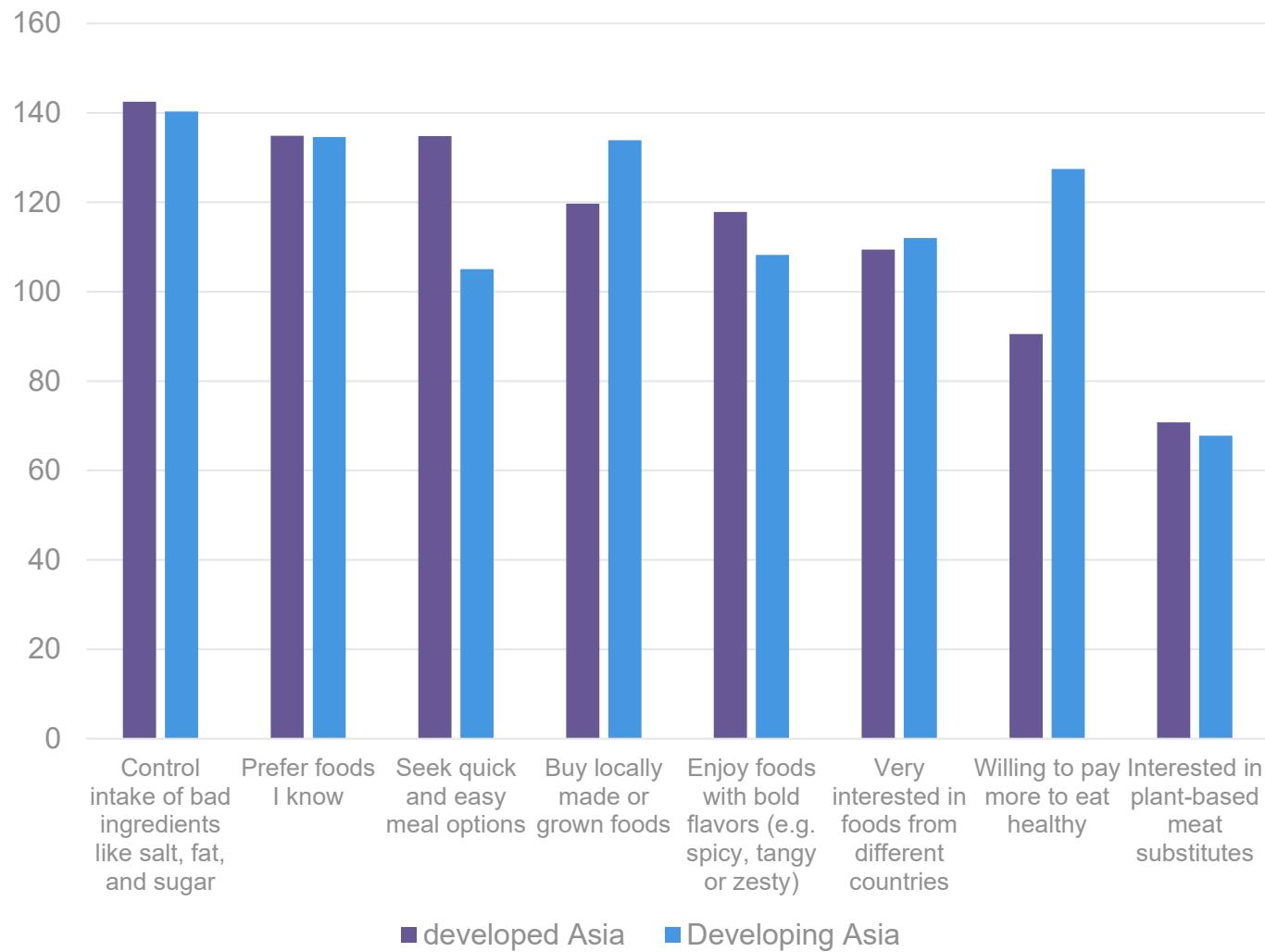


Opportunity: Combine healthy eating and with cooking fun

Openness to innovation, yet familiarity and convenience are key



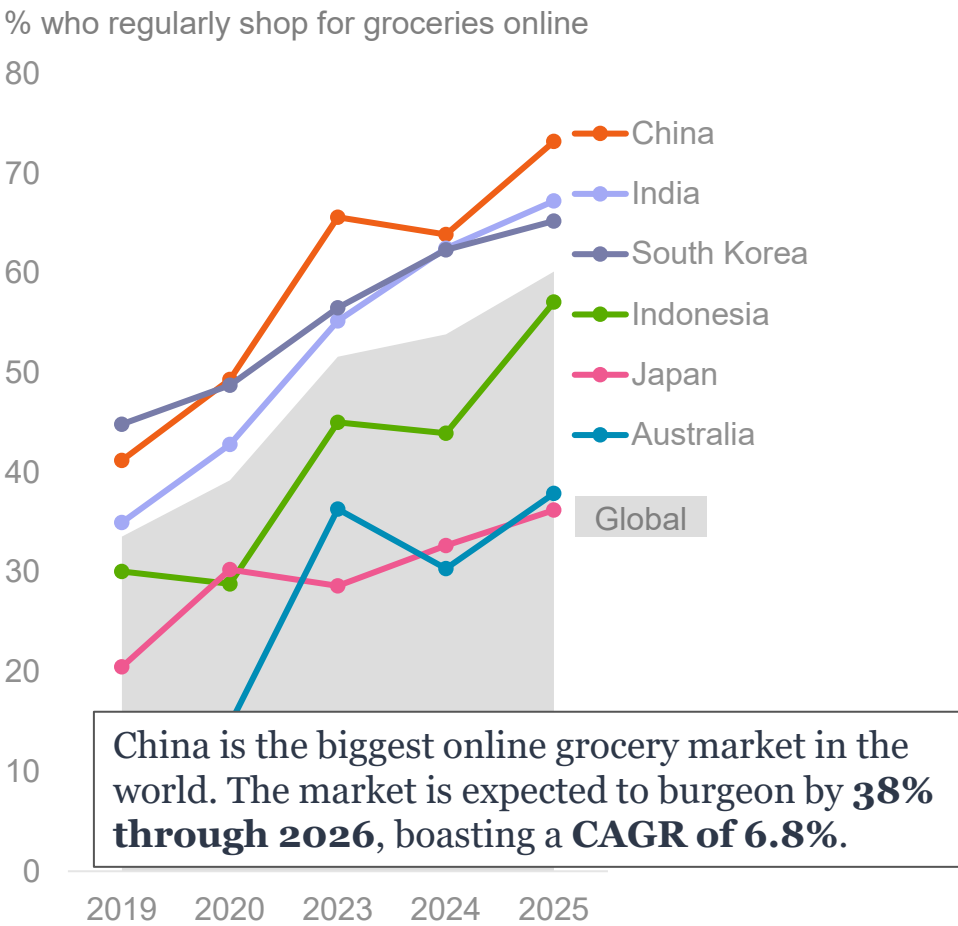
Food Attitudes, Strongly Agree (Index)



Rise of mobile food

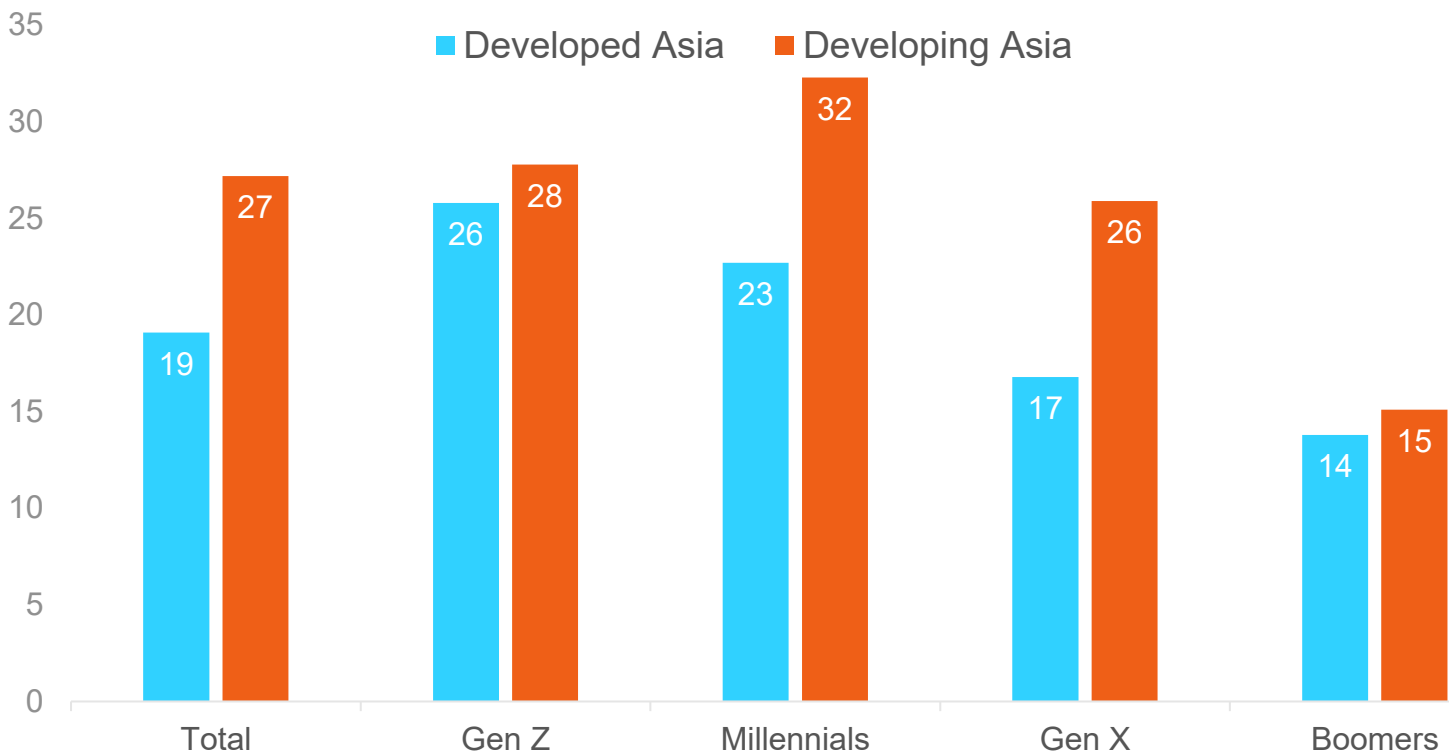
Online food shopping is up notably in the past 5 years

ASIA



Rising trend on mobile snacking

% who usually take a snack or something to eat or drink when they leave the house



NIQ Consumer Life Global 2025 and previous years, B5 (global = 18 countries); [The Growing Popularity of Online Grocery Shopping in China - SEO China Agency](#)

A woman with dark hair tied back, wearing a red long-sleeved shirt, is looking down at her smartwatch. She is holding a smartphone in her other hand. The background is a blurred city street at night with bokeh lights. The entire image has a dark blue overlay.

Technology | A Shift in Narrative

The promise and “peril” of technology

The early 2020s pushed our relationship with technology to new heights, but at what cost?

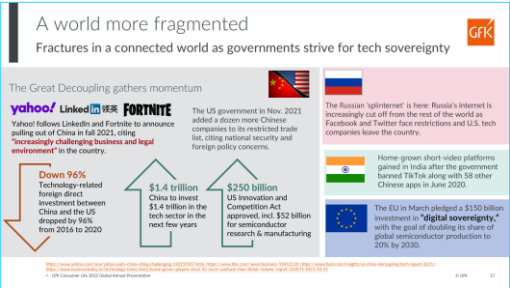
2021

- “COVID sparked a mass experimentation of deepening digital lifestyle”
- “Omni-everything”
- “Innovation initially focused on safety will remain because of convenience”



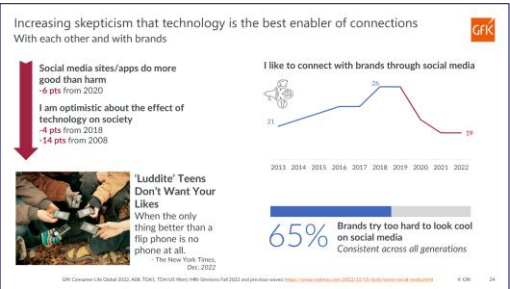
2022

- “Virtual becomes indispensable”
- “Defend AND delight me”
- “Fractures in a connected world as governments strive for tech sovereignty”



2023

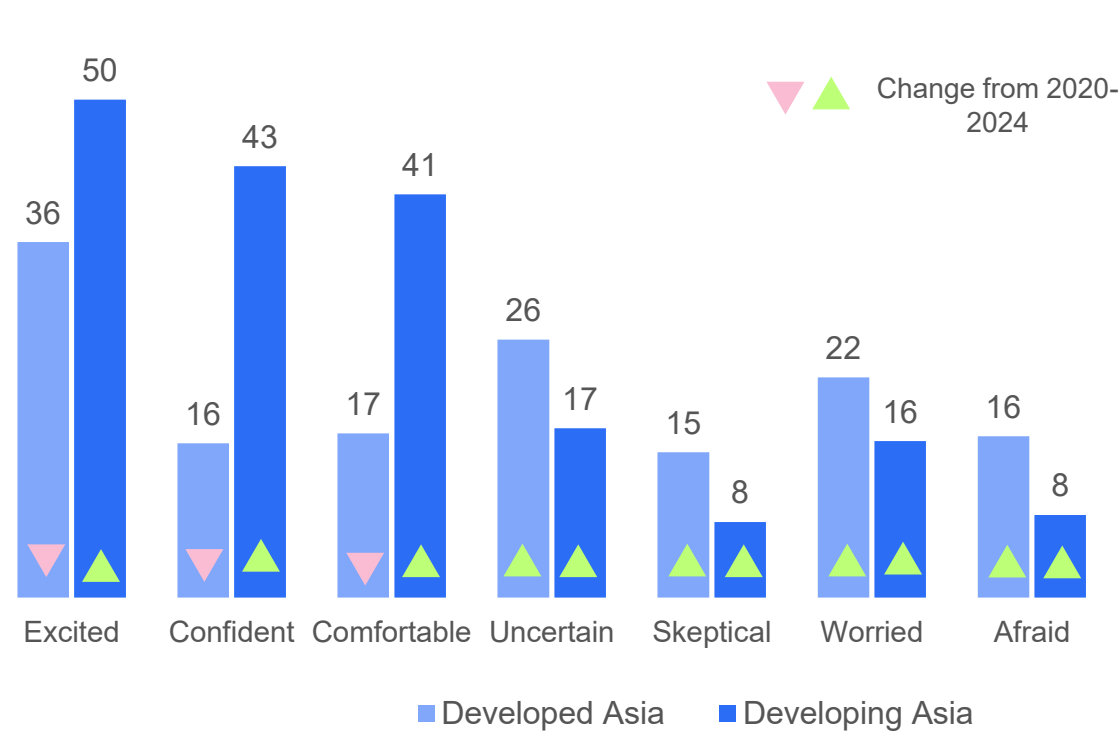
- “Increasing skepticism that technology is the best enabler of connections”
- “The silo-ing of society intensifies as we become more single-minded”



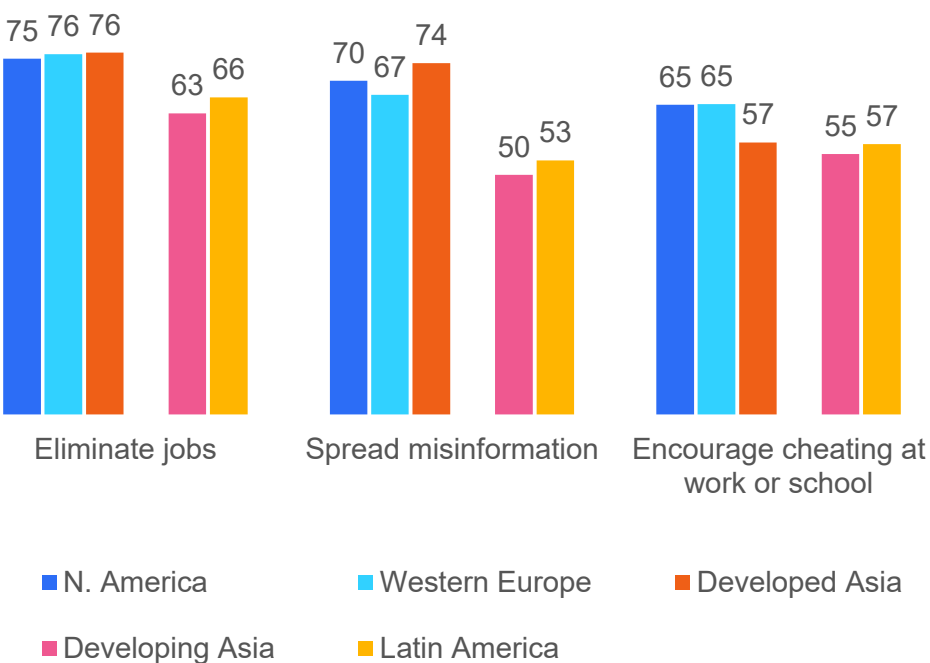
Consumer sentiment towards tech is evolving, fueled by AI concerns

While excitement prevails in developing Asia, concerns are on the rise

% of Asians who say how technology makes them feel about the future



Negatives attitudes dominated by Developed Countries



Safety concerns and apathy for smart homes

Cost still remains #1 obstacle to purchase

Rank of obstacles to buying smart home products	Developed Asia	
	2023	2025
Cost to purchase products in this category would be too high	1	1
Concern about privacy	5	3
Safety concerns in my home	6	6
Need agreement of landlord or homeowner before purchase	10	9
Home internet connection/ network may not support this technology	7	7
I don't see the need for it	2	2
Technology across different systems may not be able to communicate with each other	9	10
Seems too complicated	4	4
I don't know enough about smart home technology	3	5
I don't see any potential barriers to smart home technology	8	8

Developing Asia	
2023	2025
1	2
2	1
3	3
9	8
6	6
4	7
7	5
5	4
8	9
10	10

Concern for privacy is now top obstacle in Developing Asia, and # in developed Asia

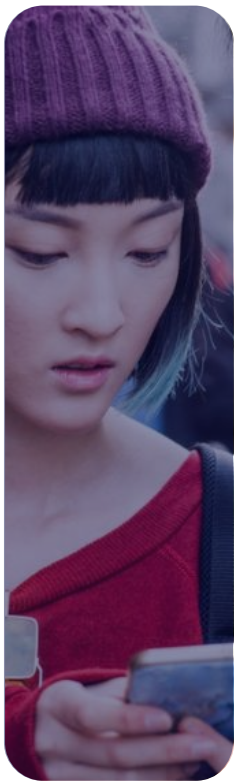
Safety concerns in home is #3 reason in Developing Asia

I don't see the need is #2 reason in Developed Asia

Asians are using a lot of technology | Plateaus and growth areas



% of Asians who did activity on mobile phone past month



Video Calls
Play Games
Browsing Information
Get directions
Watch movies/TV Programs

Buy something online
Made in-app purchase
Banking transactions
Used fitness/exercise app

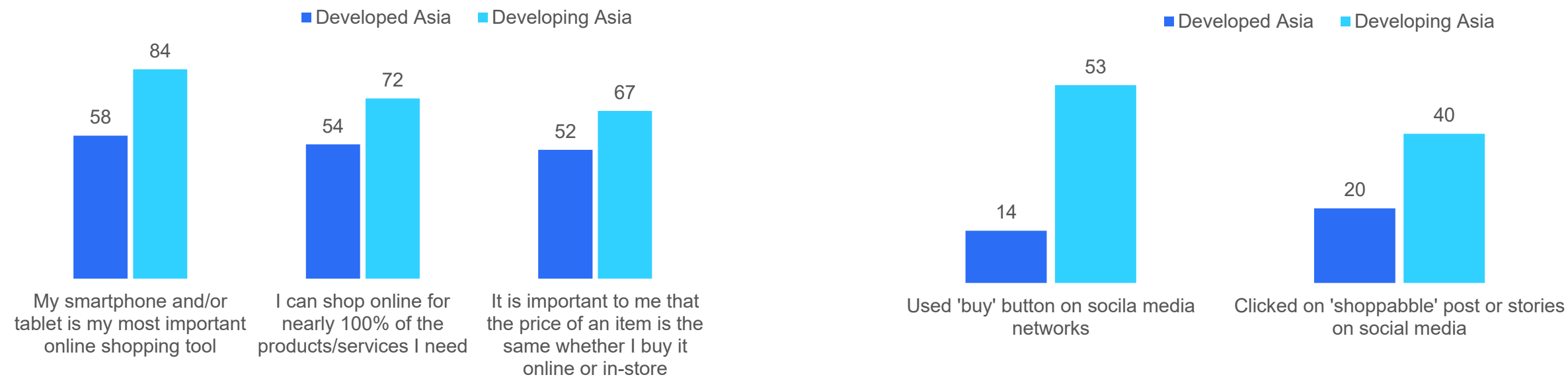
NO change in behavior past 3 years

3%+ growth past 3 years

All-in on online shopping

Focus on evolving and improving digital shopping

% to 2 box Shopping attitudes

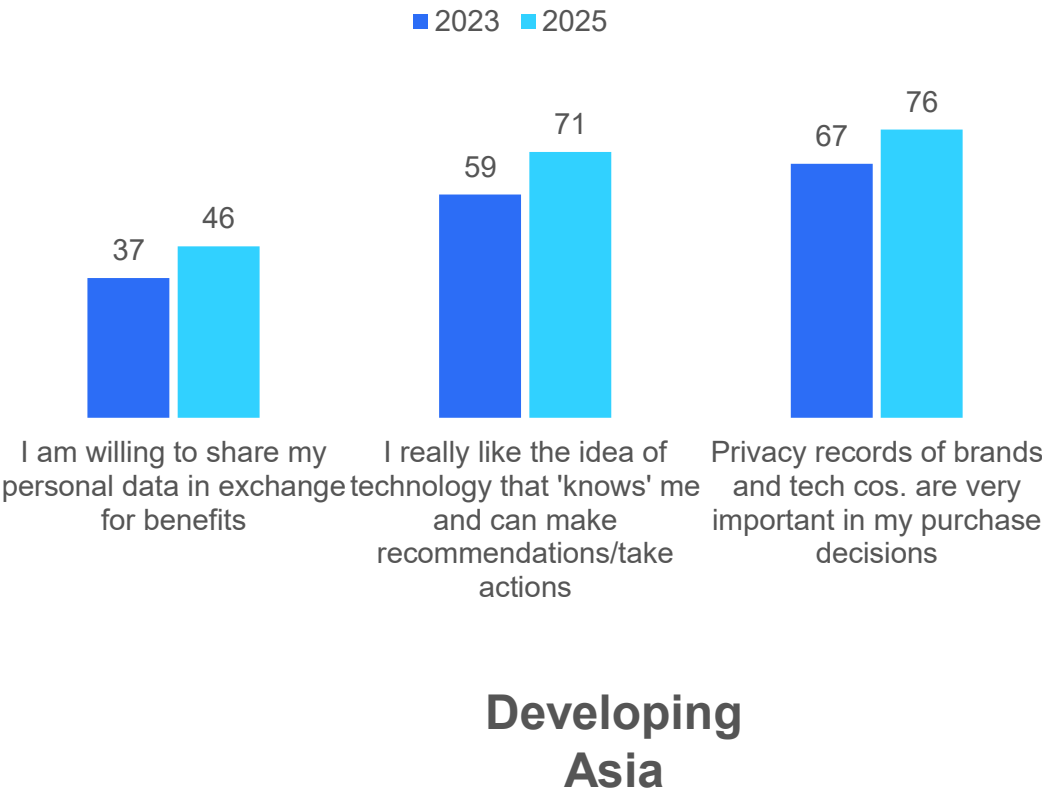
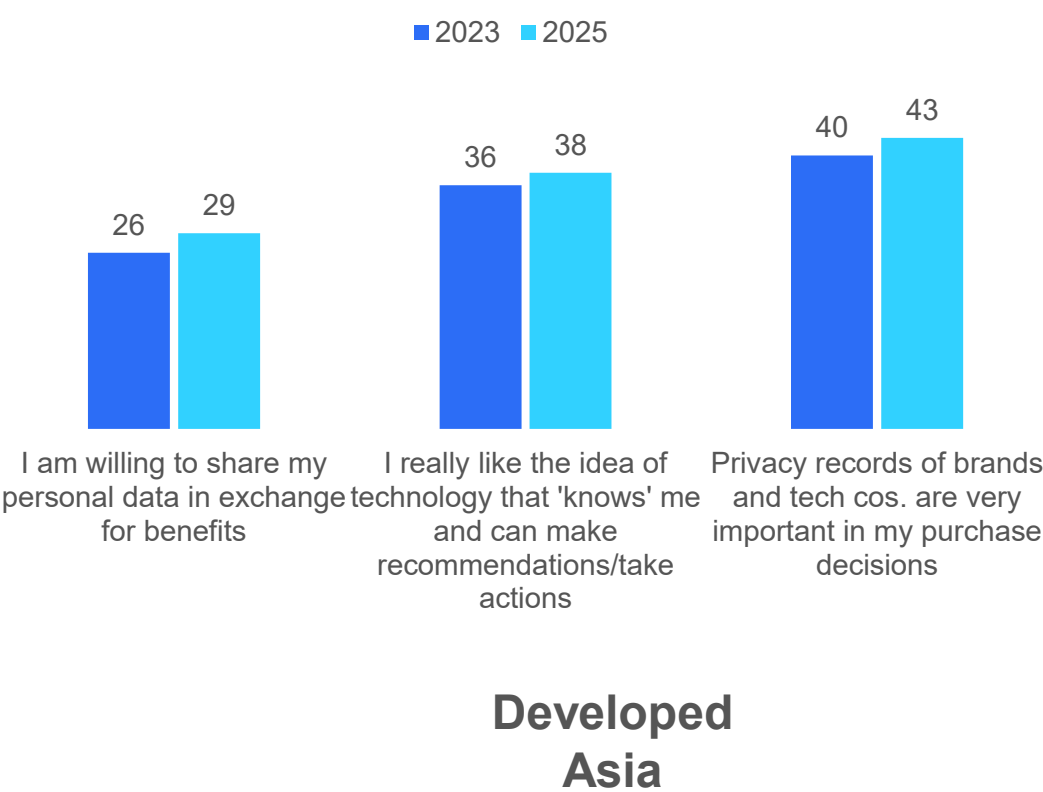


96% of consumers in developing Asia say they use a digital wallet or payment app, +6 from global
Led by WeChat Pay, Alipay, and Google Pay

Growing demand for customization AND security

Usage in work environment quickly translating to personal use

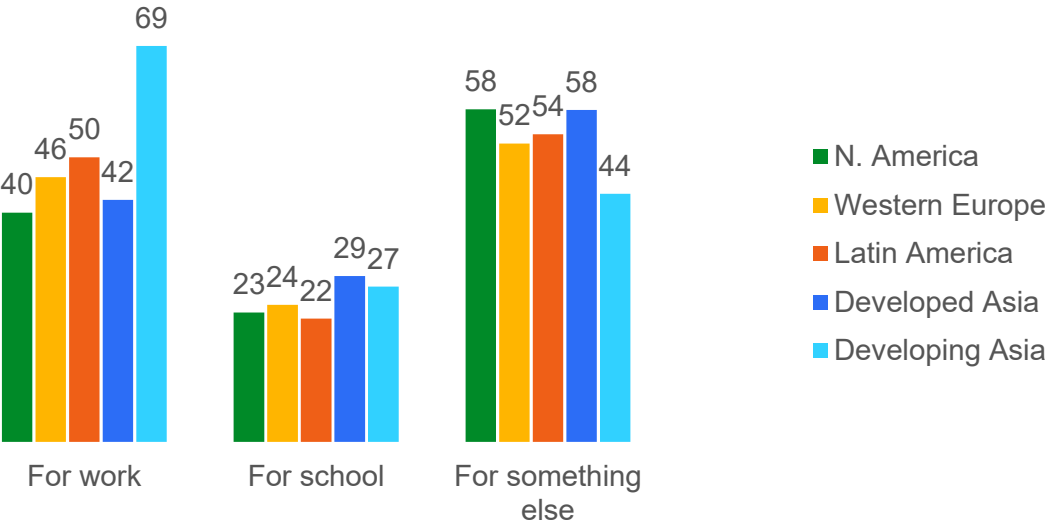
% Attitudes toward technology



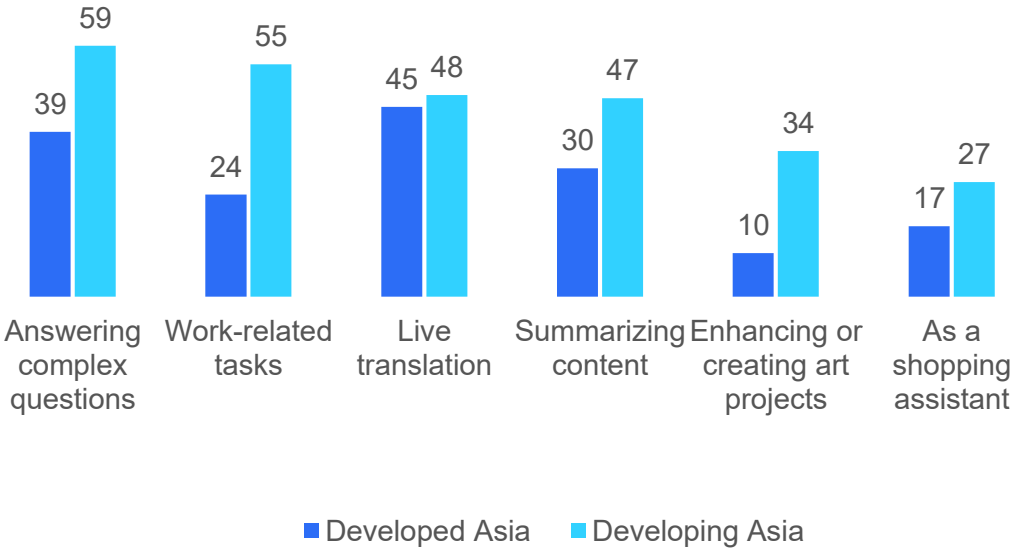
Lean Forward | Asian consumers at the forefront of AI

Usage in work environment quickly translating to personal use

% How using AI tools/apps



% Activities interesting in using AI



In the Race to Adopt AI, Asia-Pacific Is the Region to Watch – Boston Consulting Group, March 11, 2025

Key Takeaways

1 Economic Uncertainty Demands Value-Driven Strategies

- Inflation and trade tensions are driving consumer caution, especially in emerging markets.
- Brands must emphasize **affordability, value propositions, and financial reassurance** to maintain relevance.

2 Generational and Regional Diversity Requires Hyper-Personalization

- Confidence and spending priorities vary widely across Asia—India and Indonesia are optimistic, while Japan and Korea are cautious.
- **One-size-fits-all strategies will fail**; tailor messaging and offerings to local sentiment and generational values.

3 Value-Based Marketing Is The Next Differentiator

- Consumers increasingly expect brands to align with personal values like **family, honesty, health, and material security**.
- Embedding values into **innovation, messaging, and portfolio strategy** will strengthen loyalty and competitive advantage.



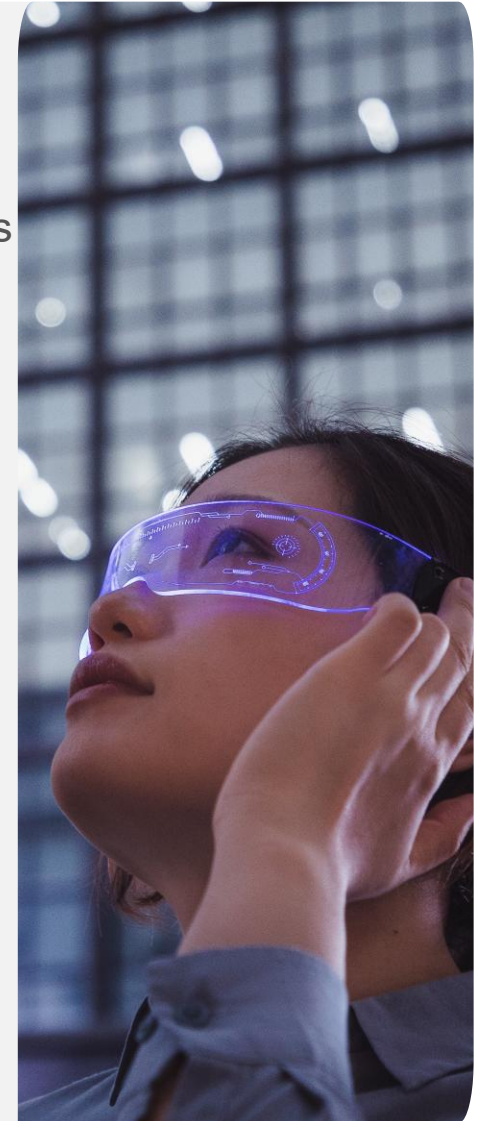
Key Takeaways

4 Health and Wellbeing Are Non-negotiable

- Physical and mental health rank as top drivers of wellbeing globally and in Asia Pacific.
- Products and services that **simplify healthy living** and integrate wellness into daily routines will gain traction.

5 Digital Acceleration and AI Adoption Create New Growth Channels

- Asia leads in **mobile-first shopping**, social commerce, and AI integration.
- Brands should invest in **frictionless digital experiences**, personalization, and AI-enabled solutions while addressing privacy concerns.



Questions?



We would love to hear your feedback



Thank You

NielsenIQ

The Full View™

NIQ deliver the Full View, the world's most complete and clear understanding of consumer buying behavior that reveals new pathways to growth. °

About NIQ

NielsenIQ (NIQ) is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. NIQ combined with GfK in 2023, bringing together two industry leaders with unparalleled global reach. Our global reach spans over 90 countries covering approximately 85% of the world's population and more than \$ 7.2 trillion in global consumer spend. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™.

For more information, please visit www.niq.com