

Asian Consumers Mega Trends

5

Needs

+

5

Brand Impacts

2023 Asian Trend Tracker

Why: To understand the increasingly contradictory consumers needs and their drivers.

How: Asian Mobile Panel – powered by dataSpring – a member of INTAGE Group

How many: 3,000 consumers in 6 countries - China, India, Indonesia, Japan, Thailand and Vietnam

**12 months
observation**

**3,000
consumers**

**5 days
Data collection**

**6
countries**

**18
sub-segments**



5 Mega Trends

1

Aging Better

The new middle-aged starts at 60



2

Digital Twin

FOMO Consumers put one foot in digital world, and another foot in the physical world for human connection.



3

Segment of ONE

Exclusive yet Inclusive



4

Generation Redefined

Don't segment consumers by age, goes deeper to understand their **pain points** + **passion points**



5

ECO² the New Value Equation

Income vs. Image vs. Impact



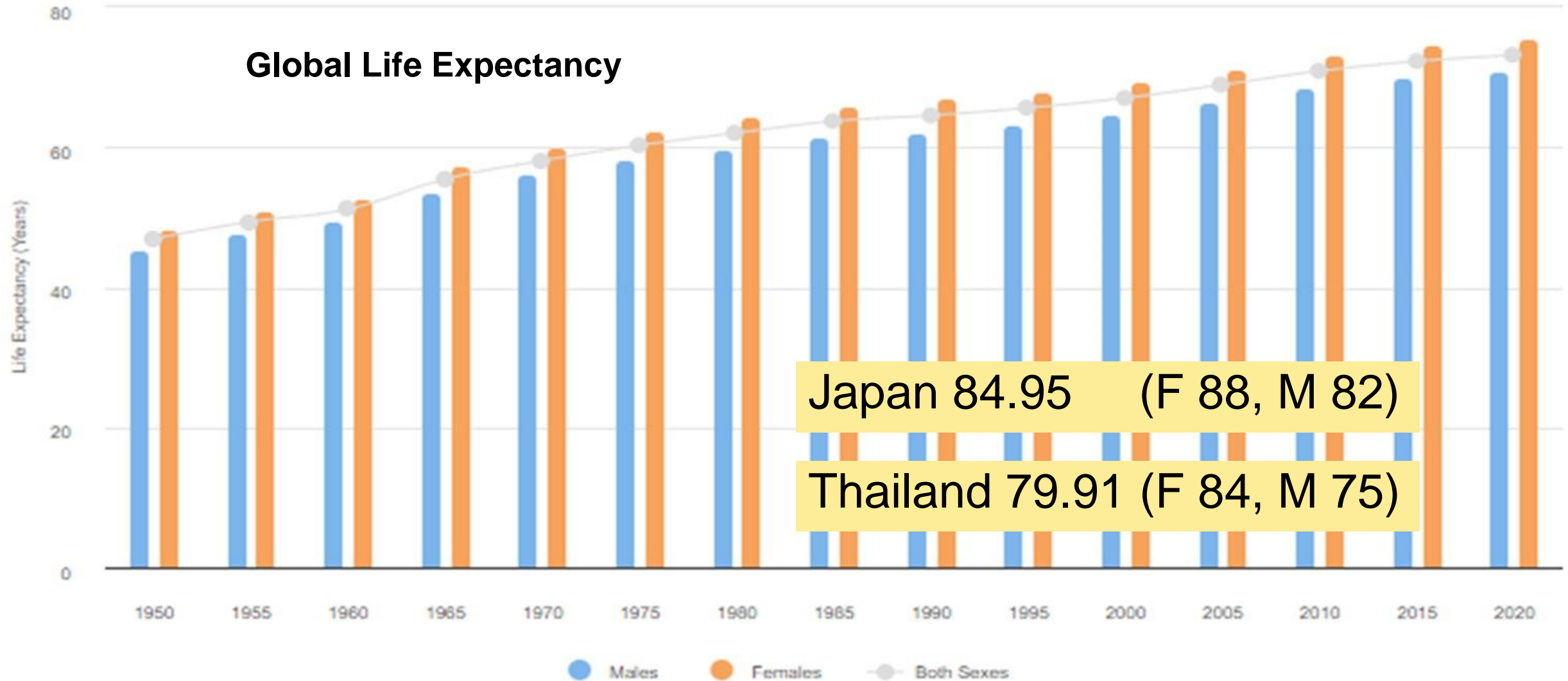
#1

Aging Better

The new middle-aged starts at 60








Good news, we all live longer!








Source: worldometer, UN

‘Good Living’ is more important than ‘Good Looking’

	Importance	Total	China	Japan	India	Indonesia	Thailand	Vietnam
	Retirement financial plan	1						
	Special healthcare for elderly	2						
	Special home arrangement for elderly	3						
	Ability to access to telemedicine	4						
	Visit anti-aging beauty clinic	5						

Note: color identifies rank % response from consumers

When nothing is certain, consumers want to make their future certain

	Importance	Total	25-34	35-49	50+
	Retirement financial plan	80	84	89	86
	Special healthcare for elderly	68	58	68	58
	Special home arrangement for elderly	63	66	67	72
	Ability to access to telemedicine	58	68	73	64
	Visit anti-aging beauty clinic	33	42	36	24
		N = 3,000 6 countries	N = 250	N = 200	N = 50

Aging is not defined by age alone

Not by age alone, aging is marked by gradual physical, cognitive, and social decline.

You are aging when:

49% older than 60 years old or retire

+

44% physically unhealthy

44% cognitively unhealthy



#2



Digital Twin

FOMO Consumers put one foot in digital world, and another foot in the physical world for human connection.

Social media continues to be part of people life

Top 5 Source of Information

China	Japan	India	Indonesia	Thailand	Vietnam
					
					
					
					
					

> 5 sources

27%

40%

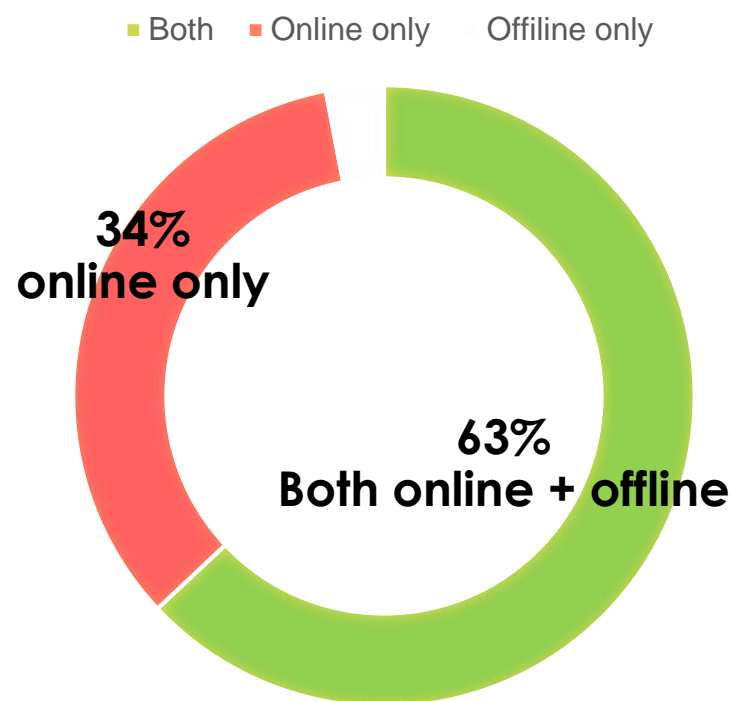
58%

34%

55%

38%

Younger gen goes 'online-only'



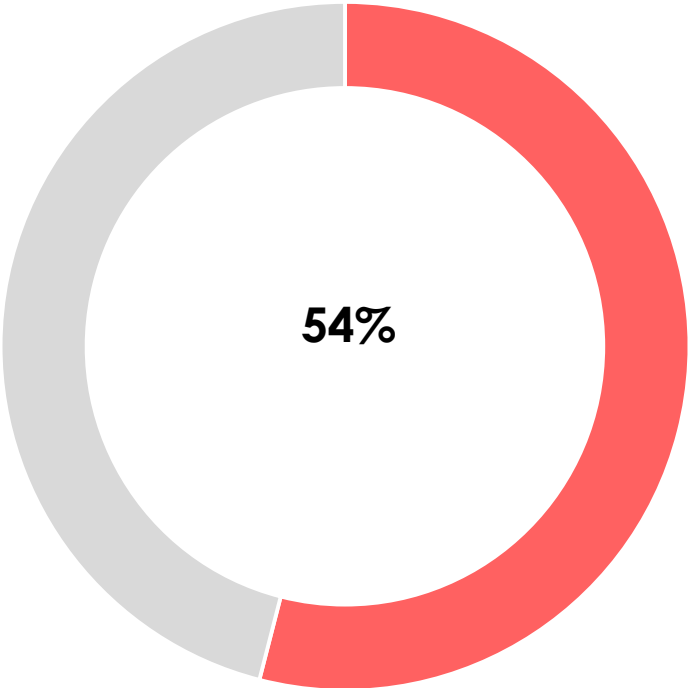
- Most use both online and offline media for information seeking, on average 5 types of media is used
- However, the younger consumers show tendency to go 'online-only', Thais and Chinese in particular

● ————— Aged 25-34 yrs. ————— ●

China	Japan	India	Indonesia	Thailand	Vietnam
55	31	22	42	56	32

35-49: 37%
50+: 25%

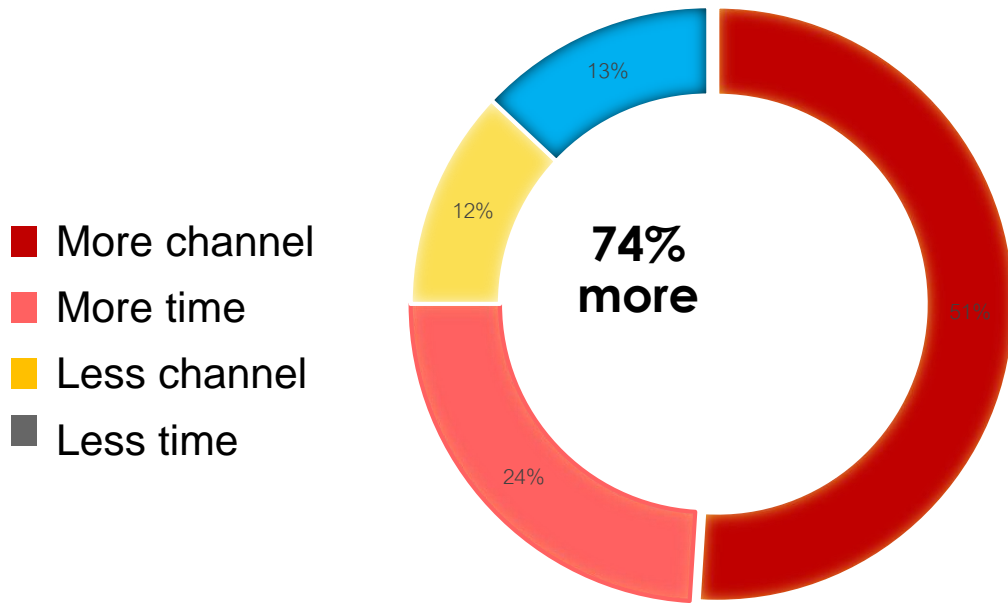
Consumers need Daily Small Indulgence, and social media helps!



Majority uses social media as Loneliness Reliever

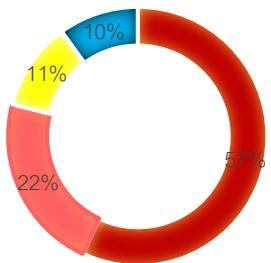
China	Japan	India	Indonesia	Thailand	Vietnam
58	19	62	66	61	56

“Stay hungry, Stay foolish”

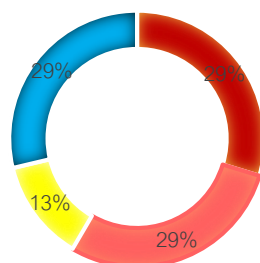


With exception to Japanese, most are open for more information sources.

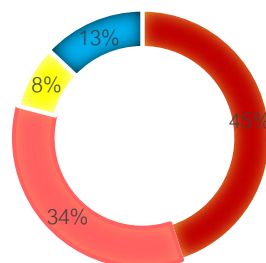
China



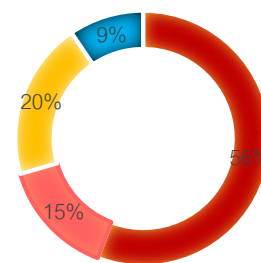
Japan



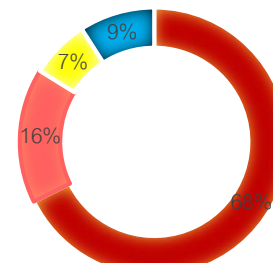
India



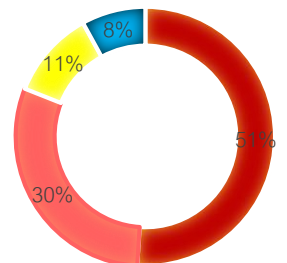
Indonesia



Thailand



Vietnam



Functional + Emotional + Social = FOMO Life



74% knowledge, information

43% catch up with other people

42% reduce stress, kill boredom

39% stay up to dated with social issues

36% buy products & service

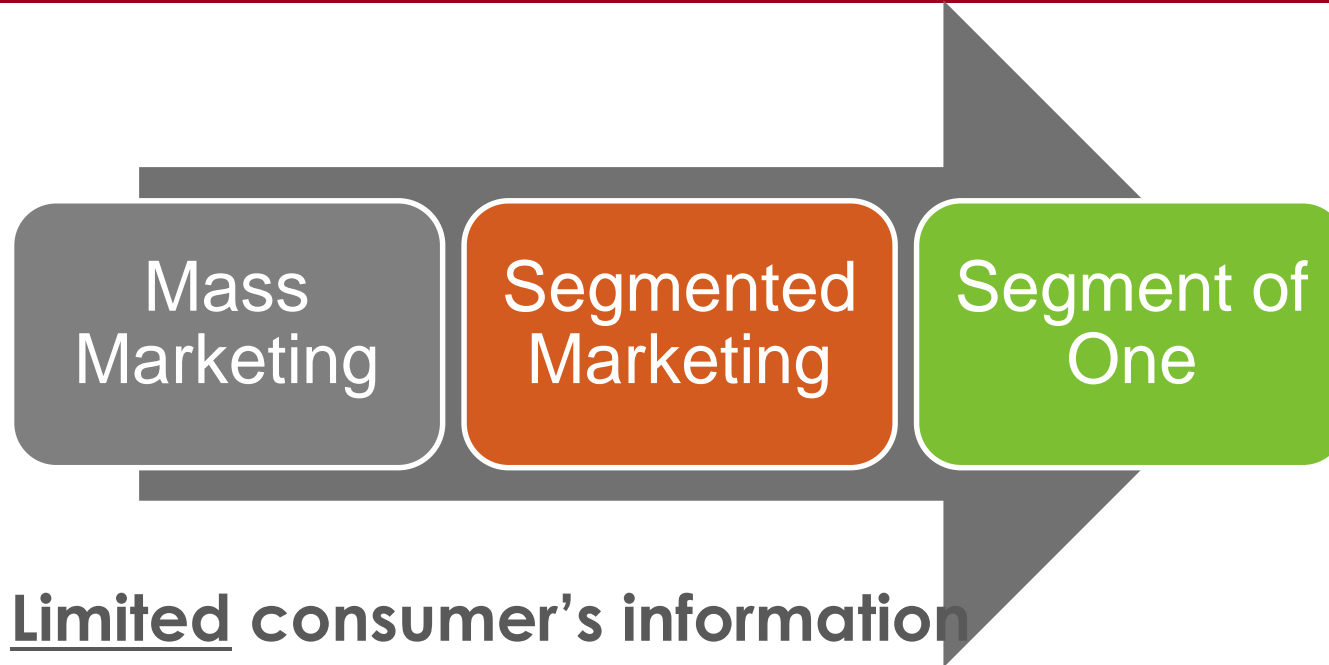


#3 Segment of ONE

Exclusive yet Inclusive



From Marketing Strategy to **Experiential Marketing Strategy**



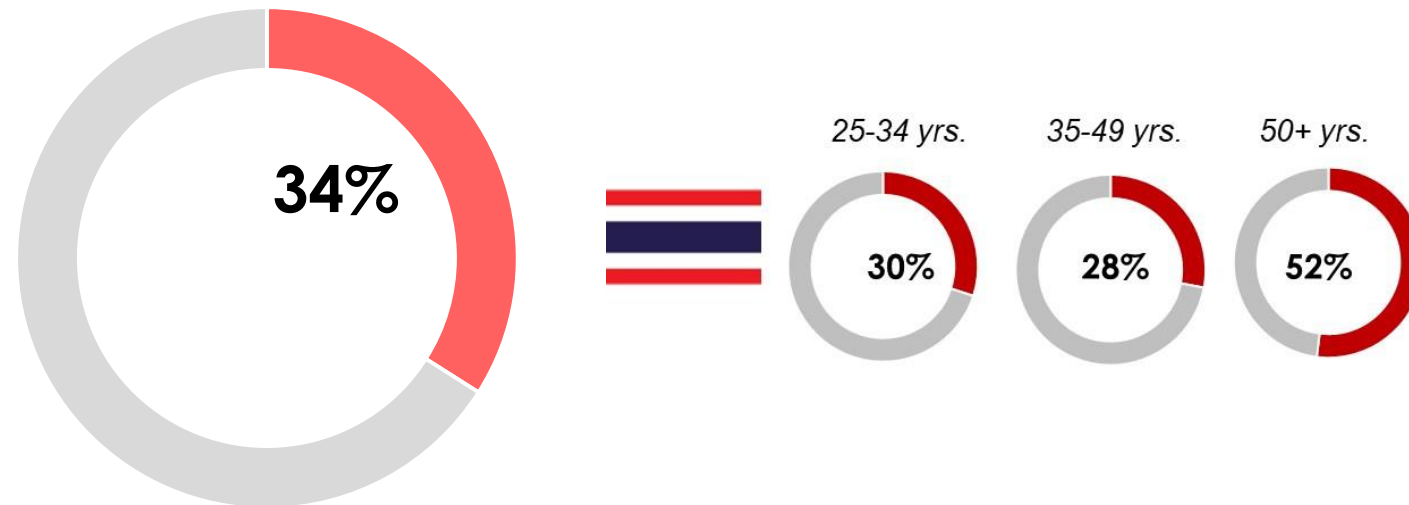
From Limited consumer's information

to Real-time consumer's information

Right offer at the **Right time** to the **Right customer**

The real Prosumer Era

Rapid technology advancement has enabled the growth of Prosumption and the Prosumer era: Producer + Consumer.

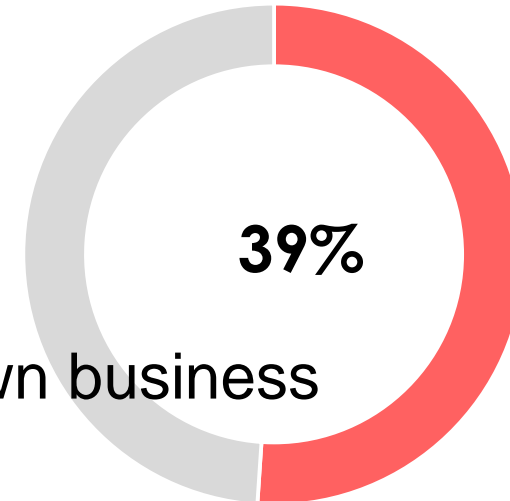


They trust their own source of information than from brand

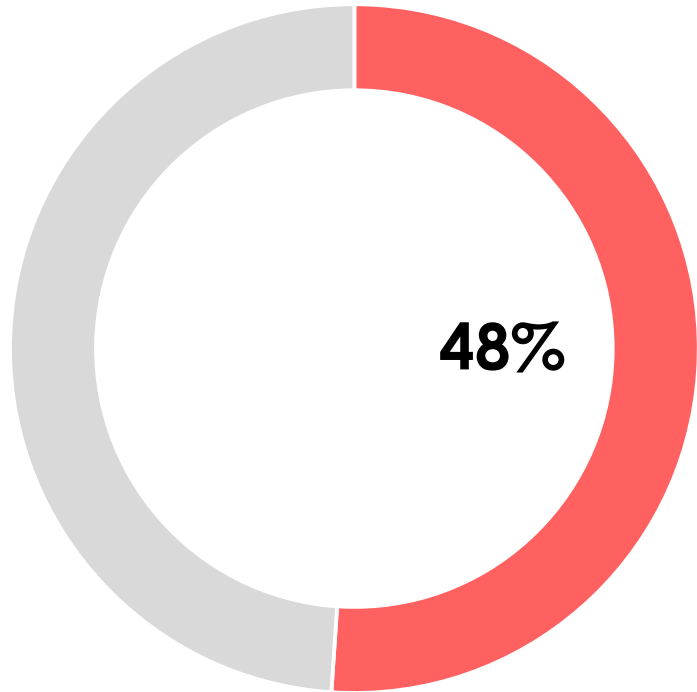
The real Prosumer Era

Rapid technology advancement has enabled the growth of Prosumption and the Prosumer era: Producer + Consumer.

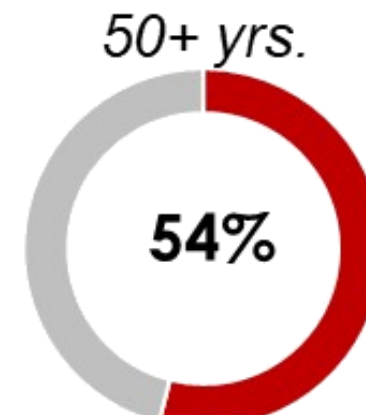
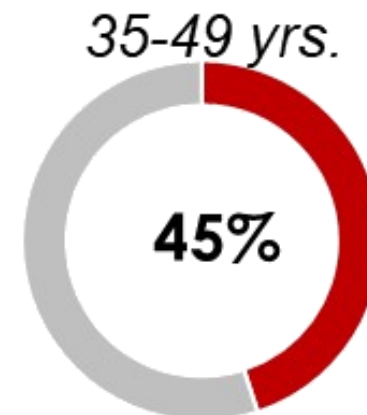
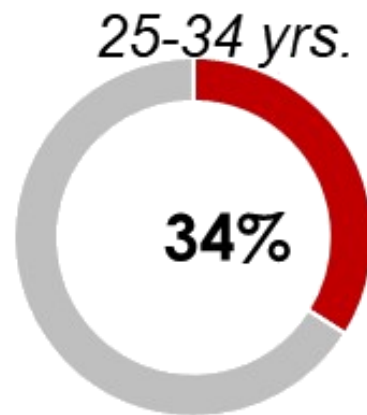
They also want to have their own business



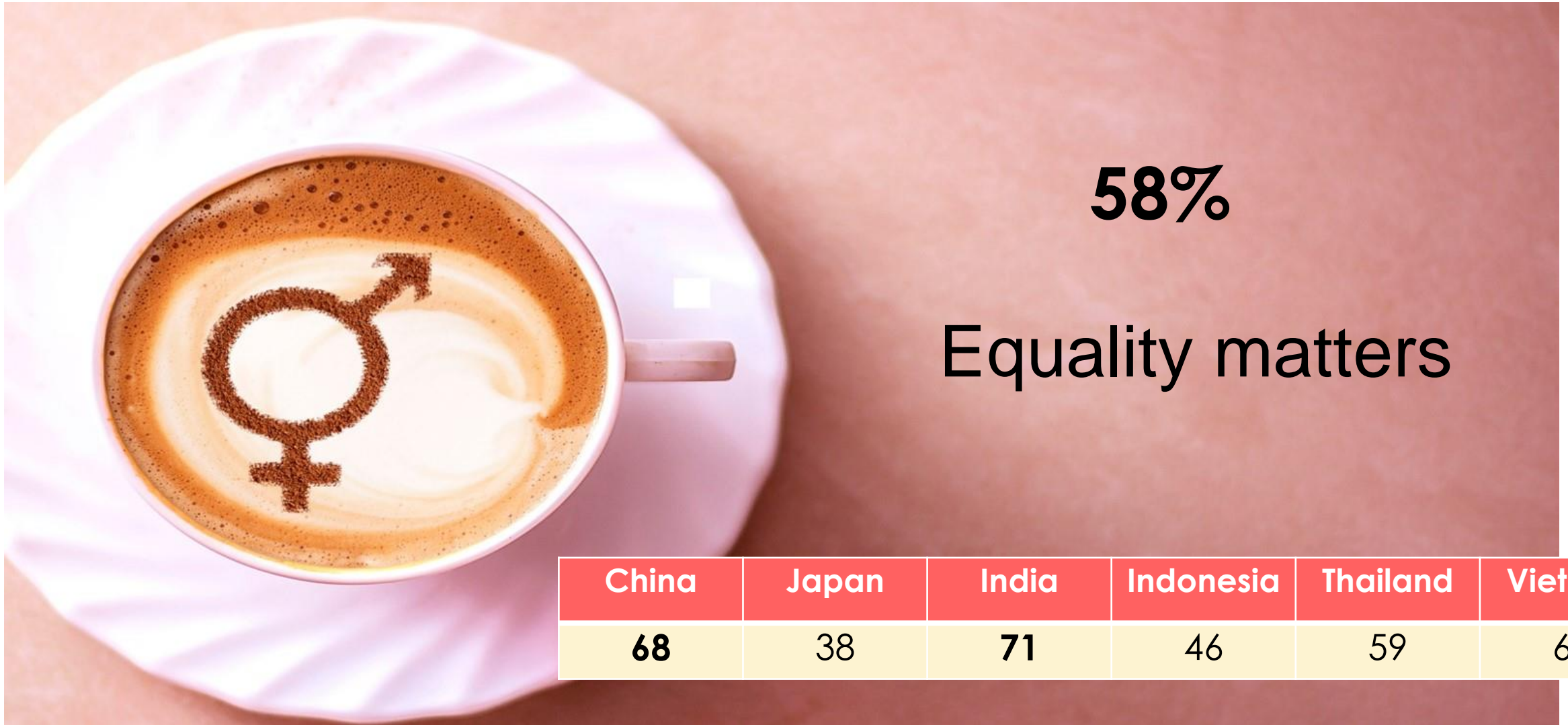
Experience is more important than brand name!



In the world of choices, consumers are open to new brands. About half indicates that experience is more important than brand name.



They are confident to stand up for others too

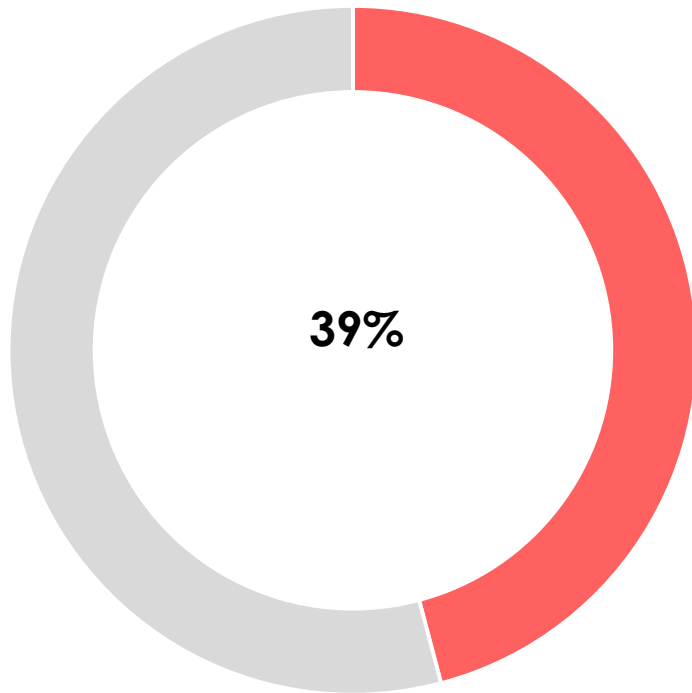


#4 Generation Redefined, segmentation redesigned



Don't segment consumers by age, goes deeper to understand their **pain points + passion points**

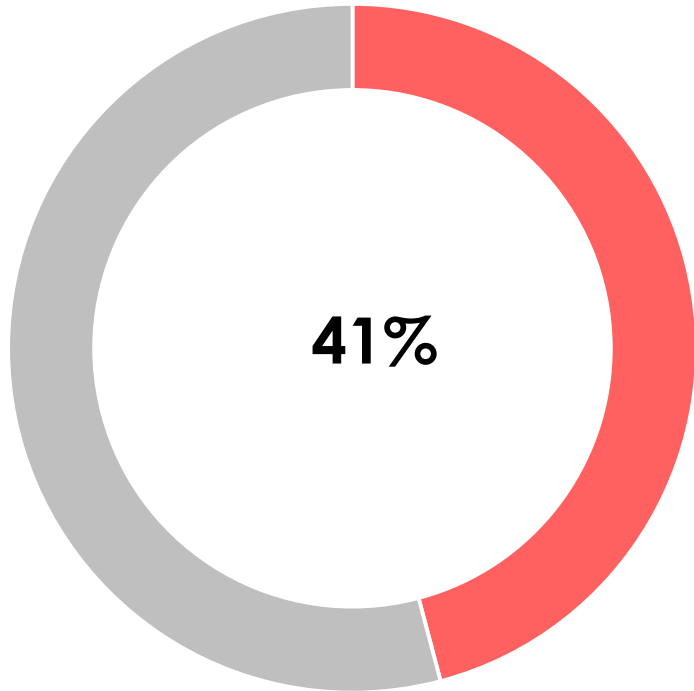
Cross-generation is a new friendship



Although year of birth shapes the past experience, it doesn't define the future.

China	Japan	India	Indonesia	Thailand	Vietnam
45	13	46	44	39	45

New media is not limited to new gen

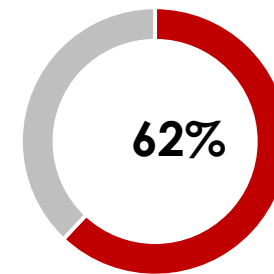


The emerging platform like TikTok from China grows fastest in Thailand – the smiling country.

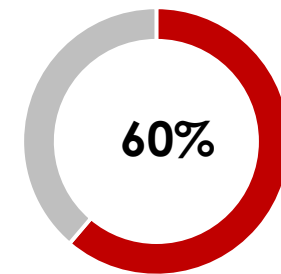
China	Japan	India	Indonesia	Thailand	Vietnam
68	10	8	49	61	51



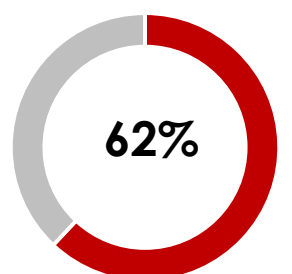
25-34 yrs.



35-49 yrs.



50+ yrs.



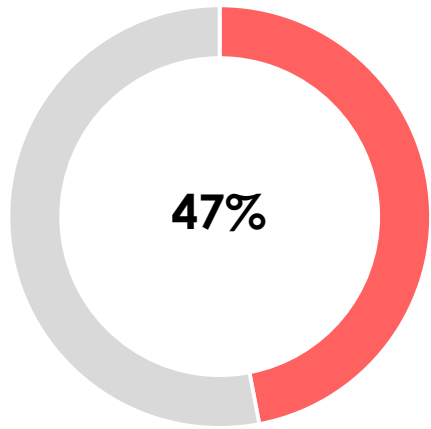
Regardless of gens, the *'shoppertainment'* booms.

#5 ECO² the New Value Equation

Income vs. Image vs. Impact



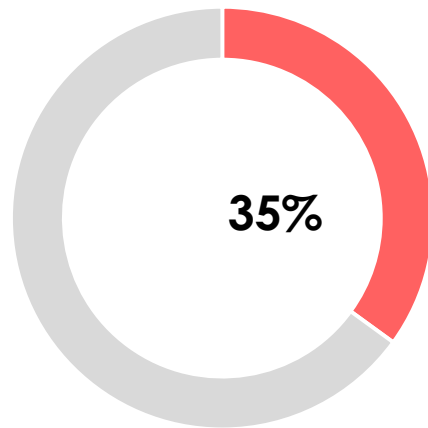
From Me to WE



About half Asian consumers feel proud to support the local or community-made products



Total TH	25-34	35-49	50+
41	36	45	48



One third believes that brands that help community employment and disadvantaged persons will get long-term brand fans.

Sustainable Consumption comes with 'income vs. impact' equation



Flexitarian is expanding. The motivational drivers in Thailand are rather unique – Health, Spirituality, Environment and Budget

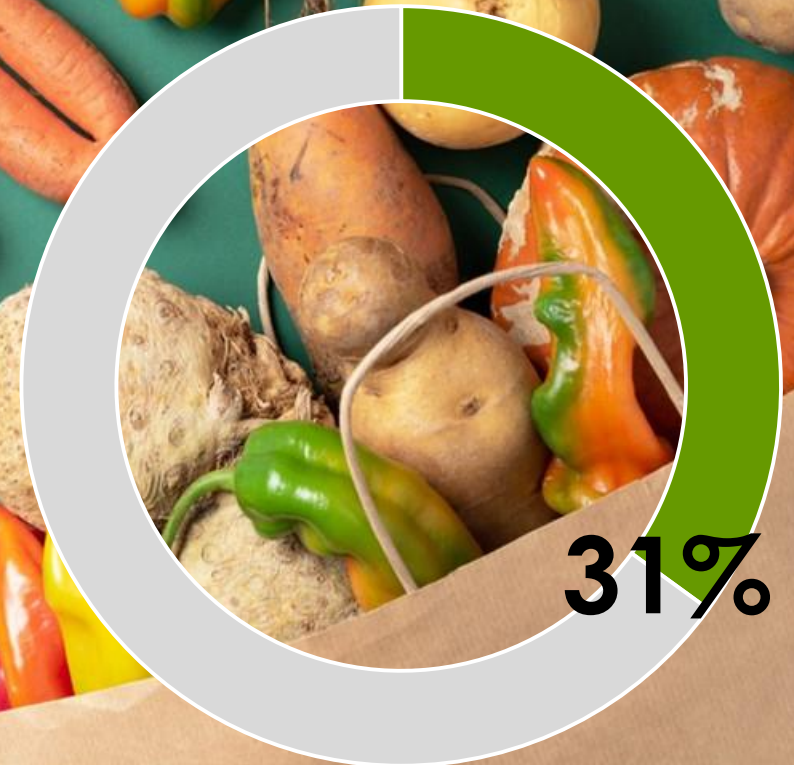
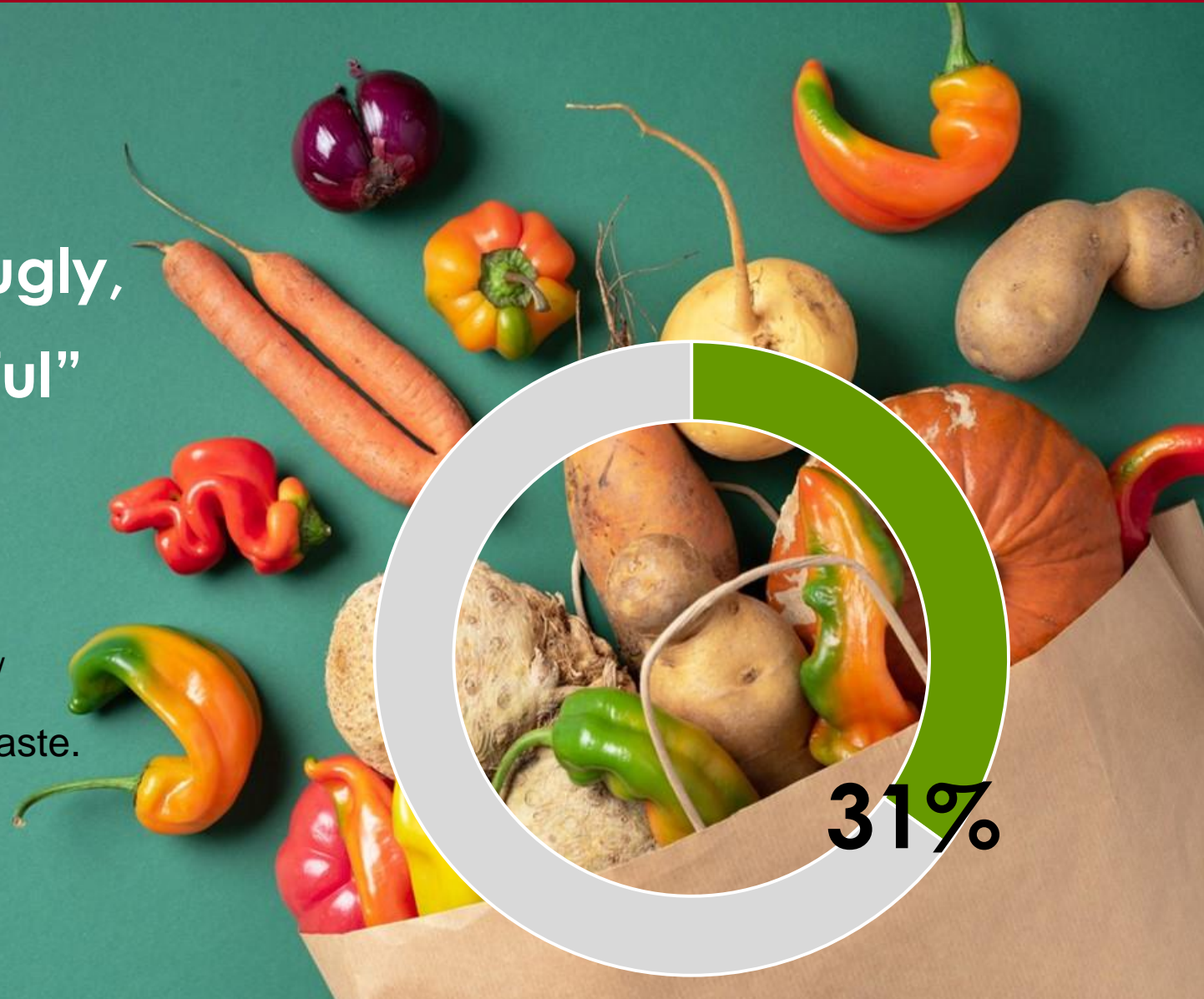


**All data has been collected from 1 Sep 2021 – 31 Aug 2022*

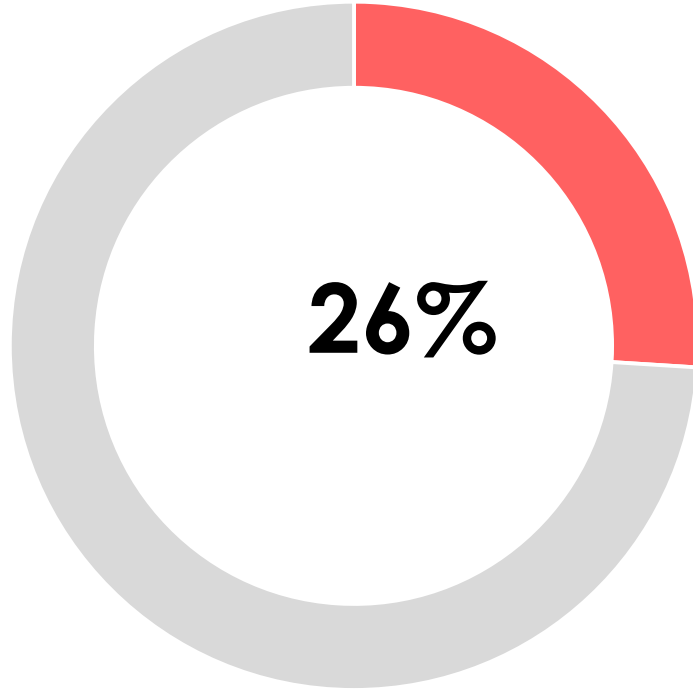
The Perfectly Imperfect

“Fruit or vegetable can be ugly,
but sustainability is beautiful”

One third of all gens is willing to buy ugly fruit/
vegetable to help farmers and reduce fresh waste.



Near-expired Food shopping is a new fashion



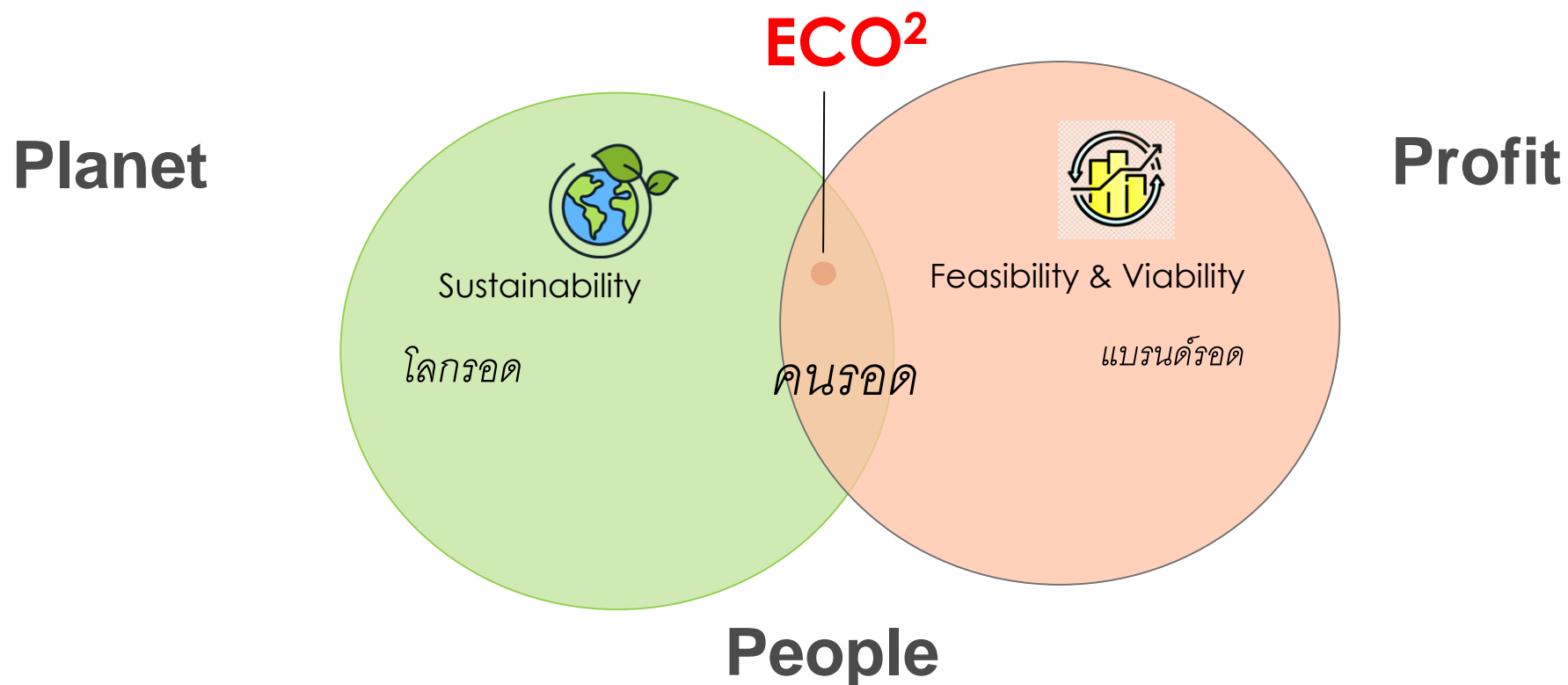
One fifth feels that those shop for 'near-expired' product is pragmatic



Online shops selling near-expired food are growing rapidly. Taobao showed that around 2 million people buy such food on the platform every year.

Consumers demand for sustainability AND affordability

Ecological friendly (We) & Economical Friendly (Me)





**Trends are like babies,
they all show potentials**



What consumers asks from a brand

From

Image



Impact

To

Pain Point



Passion Point

Like



RIGHT

Power



Purpose



The Winning Brand Toolkit

Psychology & Technology must become friends

indfu

empowering

transparent

rust

uthentic

verse

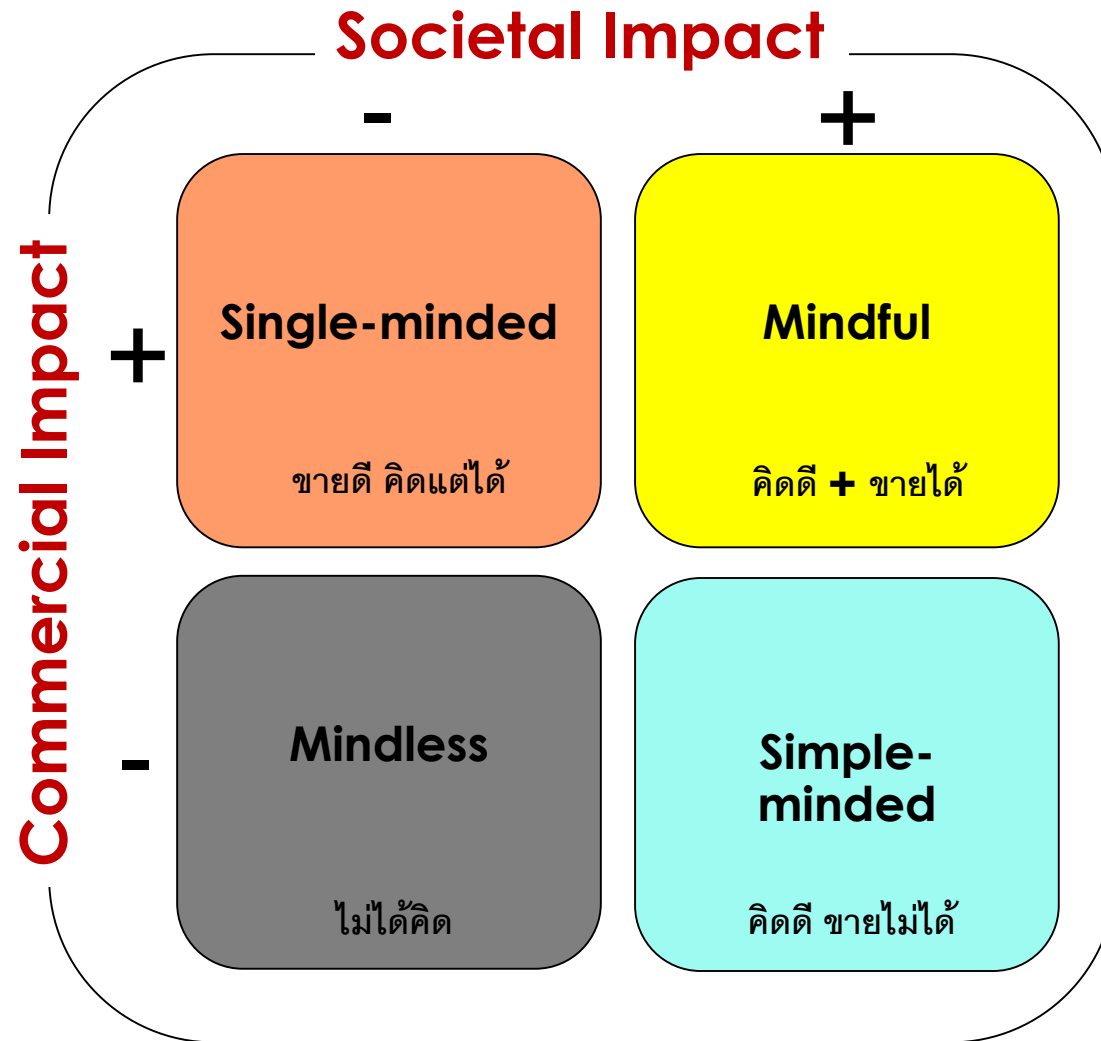


Mindful,

with **Right Marketing** NOT Like Marketing



Consumers are looking for Mindful Brands. But how mindful are we?





ไม่
ทุ่งกุลาร้องไห้



บรรจุภัณฑ์นี้
รีไซเคิลมาจาก
เปลือกข้าวหอมมะลิ



โครงการศรีแสงดาว หมู่บ้านนาหยอด

จากที่ชาวนา เคยทำ
เราได้ชักชวนชาวนา
และช่วยเพิ่มผลผลิต
บนพื้นที่ที่ดีที่สุดสำหรับ
“ทุ่งกุลาร้องไห้”

MODA

MUSEUM OF DESIGN ATLANTA




From Local to GLOCAL pride




15 INTERNATIONAL DESIGN AWARDS




Be the Big Brand in Consumers' Mind

 **ร้านหมูทอดเจ๊จิง**
3 มกราคม เวลา 07:52 น. · 🌐

เจ๊ขอปรับราคาขึ้นหน่อยนะคะ
เจ๊ต้องขอโทษด้วยค่ะ 🙏🙏🙏

 **แจ๊งลูกค้า ร้านหมูทอดเจ๊จิง**
ทางร้านขอแจ๊งปรับราคา ค่าอาหาร
เริ่ม 3 มกราคม 2565 เป็นต้นไป

ใส่ถักราดข้าว	▲ 1 อย่าง 26 บาท
	▲ 2 อย่าง 36 บาท
ใส่ถัวย	▲ 1 อย่าง 30 บาท

 **แจ๊งลูกค้า ร้านหมูทอดเจ๊จิง**

หมูทอด	▲ โละ 300 บาท
--------	---------------

👍 3.3 พัน ความคิดเห็น 79 รายการ แชร์ 104 ครั้ง

 **ร้านหมูทอดเจ๊จิง**
23 กุมภาพันธ์ เวลา 06:28 น. · 🌐

วันนี้เจ๊ปรับราคาลงนะคะ(๕๕๕)ตามนี้นะคะ(๕๕๕)

 **ร้านหมูทอดเจ๊จิง**
แจ๊งปรับราคา ลง(เริ่ม 23/02/65)

หมูทอด	290 บาท/โล
ต้มยำกระดูกซี่โครง	170 บาท/โล

👍❤️ 2.8 พัน ความคิดเห็น 110 รายการ แชร์ 241 ครั้ง

Brand Promise tells you 'what to do'
as well as 'what not to do'

Everyone
Matters

Empowering people,
not brand

Empathy First

EM • PA • THY



“IN”



“FEELING”



เข้าใจ \neq ตามใจ

Understanding

Spoiling



JP case: from pain point to passion point

Japanese Sound Princess



JP case: big brand purpose for small segment



ME**T**TA

Transparent & Truthful



No half truth!

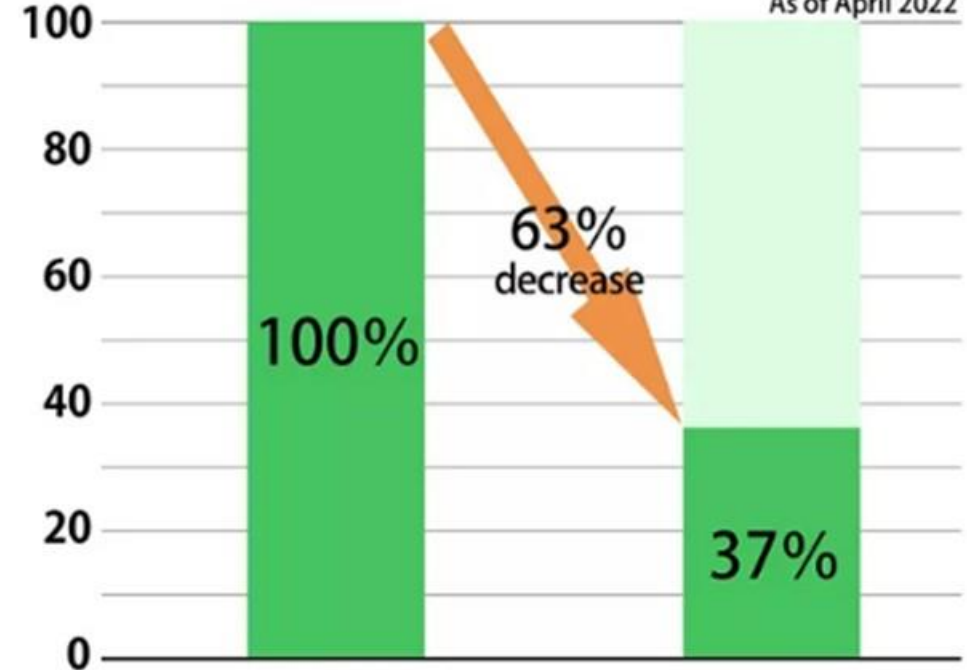
Transparency is not only about 'where product comes from', but from beginning of supply chain to consumers' hands



Loading containers onto a ferry

[%] Environmental impact during transportaion

As of April 2022



Kao's
conventional
liquid detergents





TH case: when transparency wins consumers' heart



Trust

Third-party is out, Zero-party Data is in

Zero-party Data is richer in values, but not volume



Zero-party Data

Data customers consciously share with a brand.

It may be low in volume but high in values



First-party Data

Data collected directly by a company when customers interact with a brand



Second-party Data

First-party data another company shared with you with contractual permission of use



Third-party Data

Aggregated data from public/non-public sources.

It is high in volume, but may be low in values

METTA

I Miss You...

Even when we are apart, we have a link from heart to heart.

Authentic

yet relevant



“เราเชื่อว่าในความธรรมดา คุณได้ทำดีในแบบของตัวเองแล้ว”

ถึง คุณ...คนธรรมดา

เรารู้ว่าคุณเหนื่อยกับการใช้ชีวิตในฐานะคนธรรมดา ที่ไม่โดดเด่นหรือพิเศษแบบคนอื่น ๆ ถึงแม้จะตั้งใจใช้ชีวิตแค่ไหน ชีวิตก็อาจจะรู้สึกล้นอยู่เสมอ

ห่านคู่อยากบอกว่า ถ้าคุณรู้สึกเหนื่อย เราจะเป็นความสบายใจให้กับคุณ อยู่เคียงคู่คุณ ในช่วงเวลาธรรมดาของชีวิต เราอยู่ง่าย อยู่ทน ไม่ต้องดูแลมากมาย และจะคอยเป็นพื้นที่ที่คุณสามารถเป็นตัวของตัวเองได้เสมอ ขอเพียงแค่คุณอย่ารู้สึกผิดกับการเป็นคนธรรมดาก็พอ เพราะเราเชื่อว่าในความธรรมดา คุณได้ทำมาดีในแบบของตัวเองแล้ว



Perfect T-Shirt For Every Style

ห่านคู่ เสื้อยืดที่รู้จักคนไทยที่สุด

ห่านคู่
เสื้อยืดธรรมดา

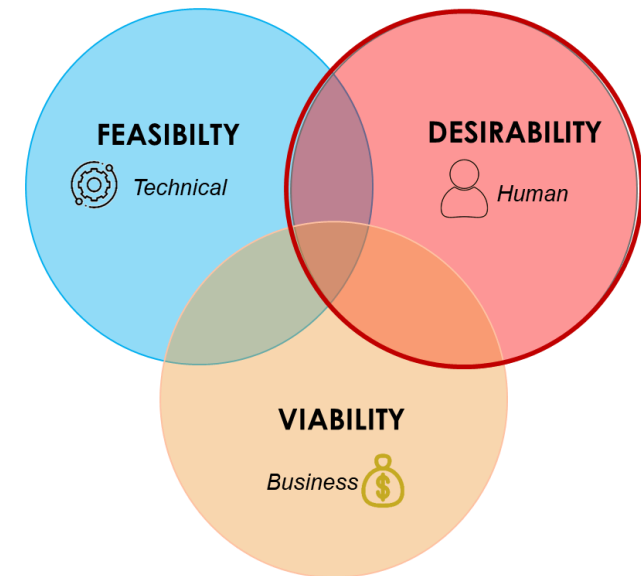
เสื้อยืด
ธรรมดา
ที่ทำมาดี

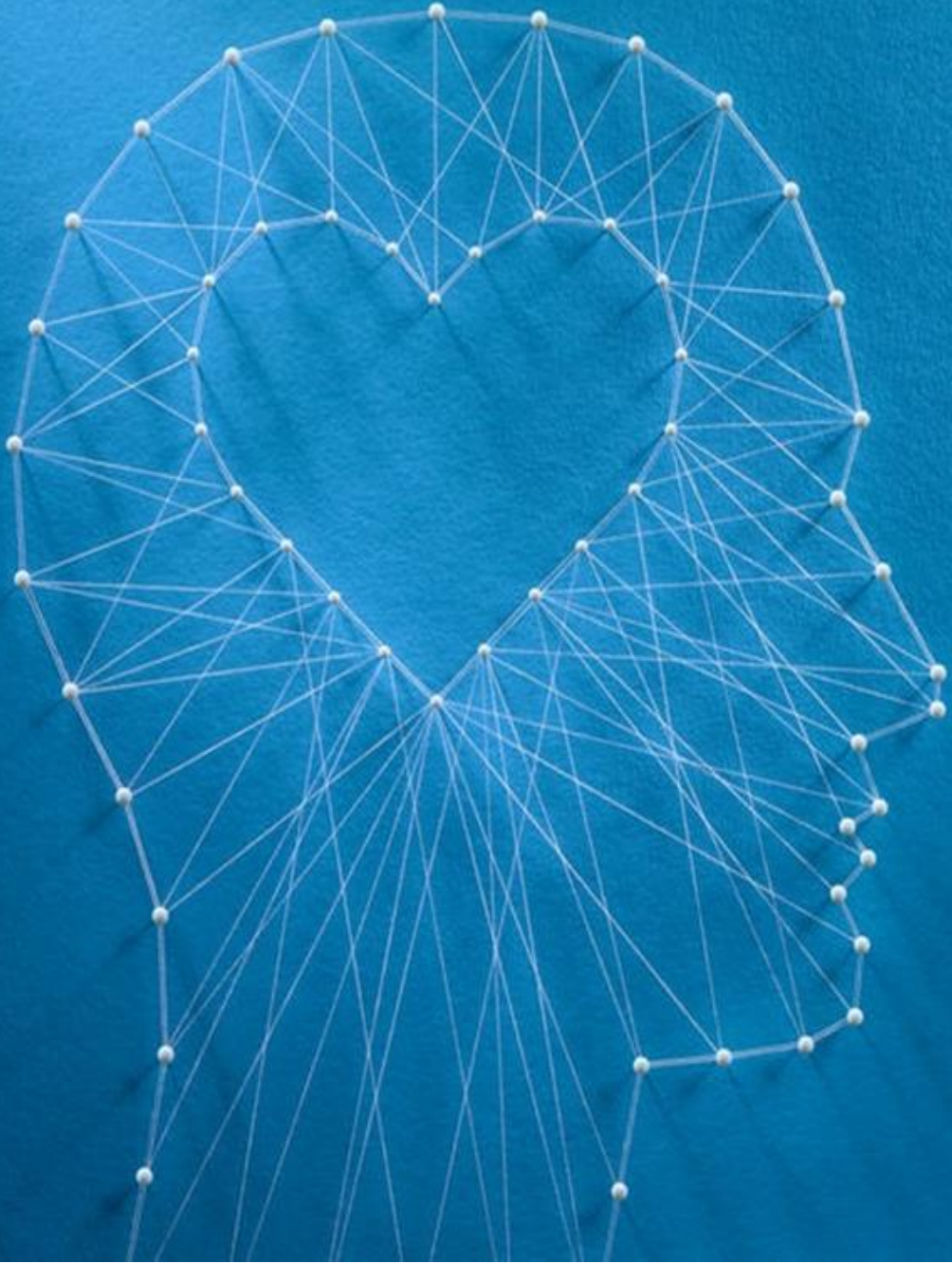
‘MisFit’ สร้างคุณค่าใหม่ให้ความไม่สมบูรณ์แบบ
ขับเคลื่อน Sustainable Fashion ไม่ใช่ Fast Fashion



Empathy without Action is useless

Action without Empathy is futureless!





Because people won't
remember what you do,
they will remember how
you made them **FEEL!** ❤️

ME + WE

dangjai-a@th.intage.com



INTAGE ACADEMY

Intelligence Inspiring Marketing Innovation