

**GLOBAL
TRENDS**

GLOBAL TRENDS 2024

UNDERSTANDING ASIA

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DECEMBER 2024



We are celebrating our 10th year of Ipsos Global Trends report, which highlights what our consumers and citizens think and feel in a world of rapid change and complexity.

Ipsos Global Trends is based on more than 50,000 interviews across 50 markets

Representing three quarters of the world's population and 90% of the world's GDP, providing a view of how the world feels from a human perspectives



How we built the Trends for this edition

Our framework is a product of collaboration between Ipsos colleagues across nearly 90 markets using Ipsos theory of change – a model for exploring how **Macro forces** (the external context against which people and organisations act), **Shifts** (changes in attitudes and value across society, markets and people) and **Signals** (visible real-world expressions of change observed at local and more surface level)



Here we look at the region of Asia through 3 key trends

#1: TECHNOWONDER



If **2023** was the year when **generative AI was introduced** to the wider world.

2024 is when **it needs to show its potential** and become **more embedded** in our lives and work.

#2: RETREAT TO OLD SYSTEMS



Technology is bringing great change and **people are getting the benefits.**

In the region as we head into a new world that can't be separated with technology, there is a **desire among some to turn back the clock.**

#3: CLIMATE CONVERGENCE



2024 is expected to be **the hottest year** on record globally, breaking the previous record set only last year.

Asia's temperatures are rising faster than the global average, potentially face greater consequences.

TECHNOWONDER

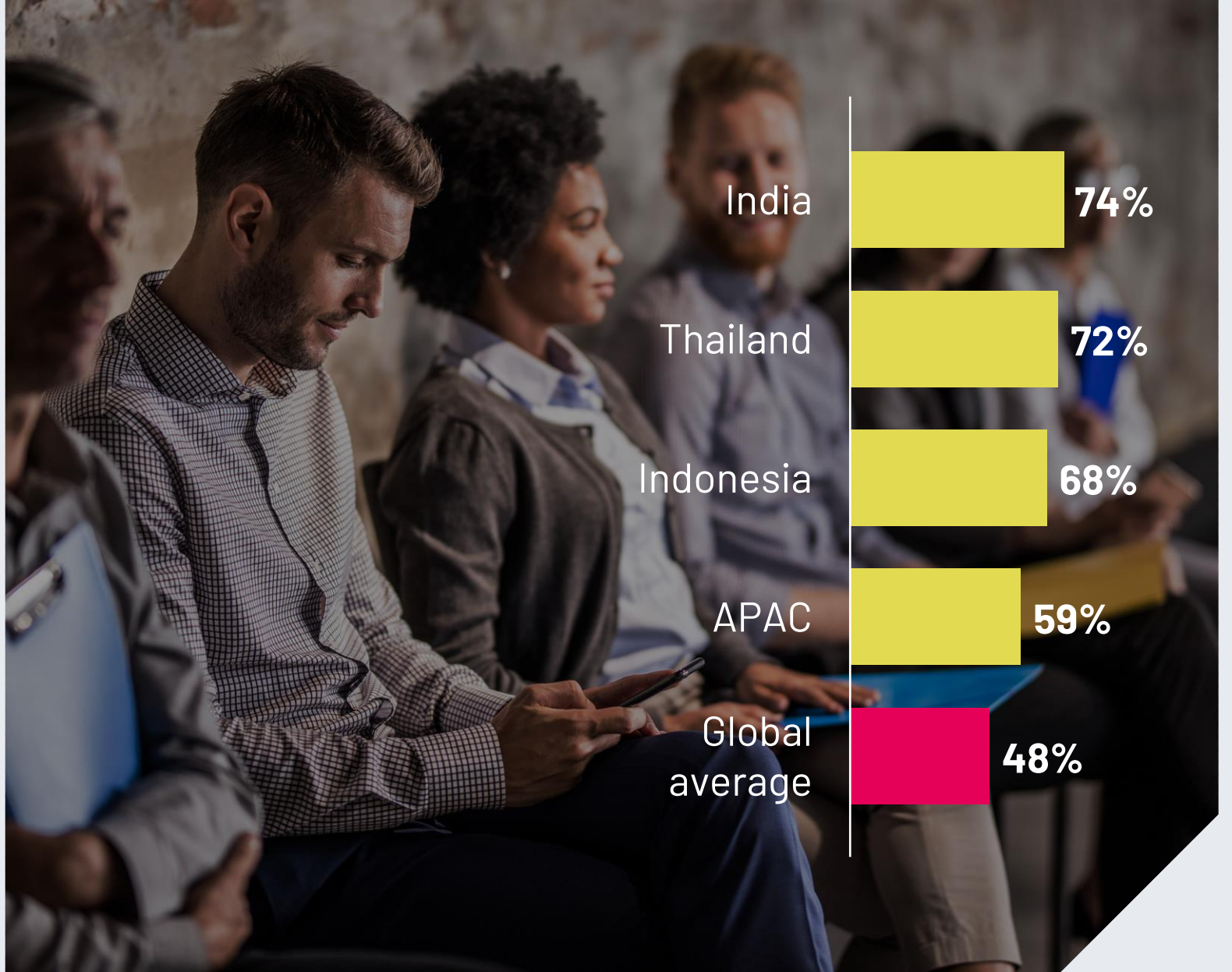
People in APAC are excited for technological advances, including AI

68%

believe AI is having a positive impact on the world, compared to just over half (57%) globally

APAC consumers generally believe that **AI will create more jobs than they destroy**

Ipsos indicates that the optimism among APAC consumers, especially in India, Thailand, and Indonesia, might stem from a **limited understanding of AI's capability** to automate routine tasks, which could lead to the **displacement of existing jobs in the market.**



Despite the figures,

76%

of APAC consumer expressed **concerns about data privacy** in technological advances

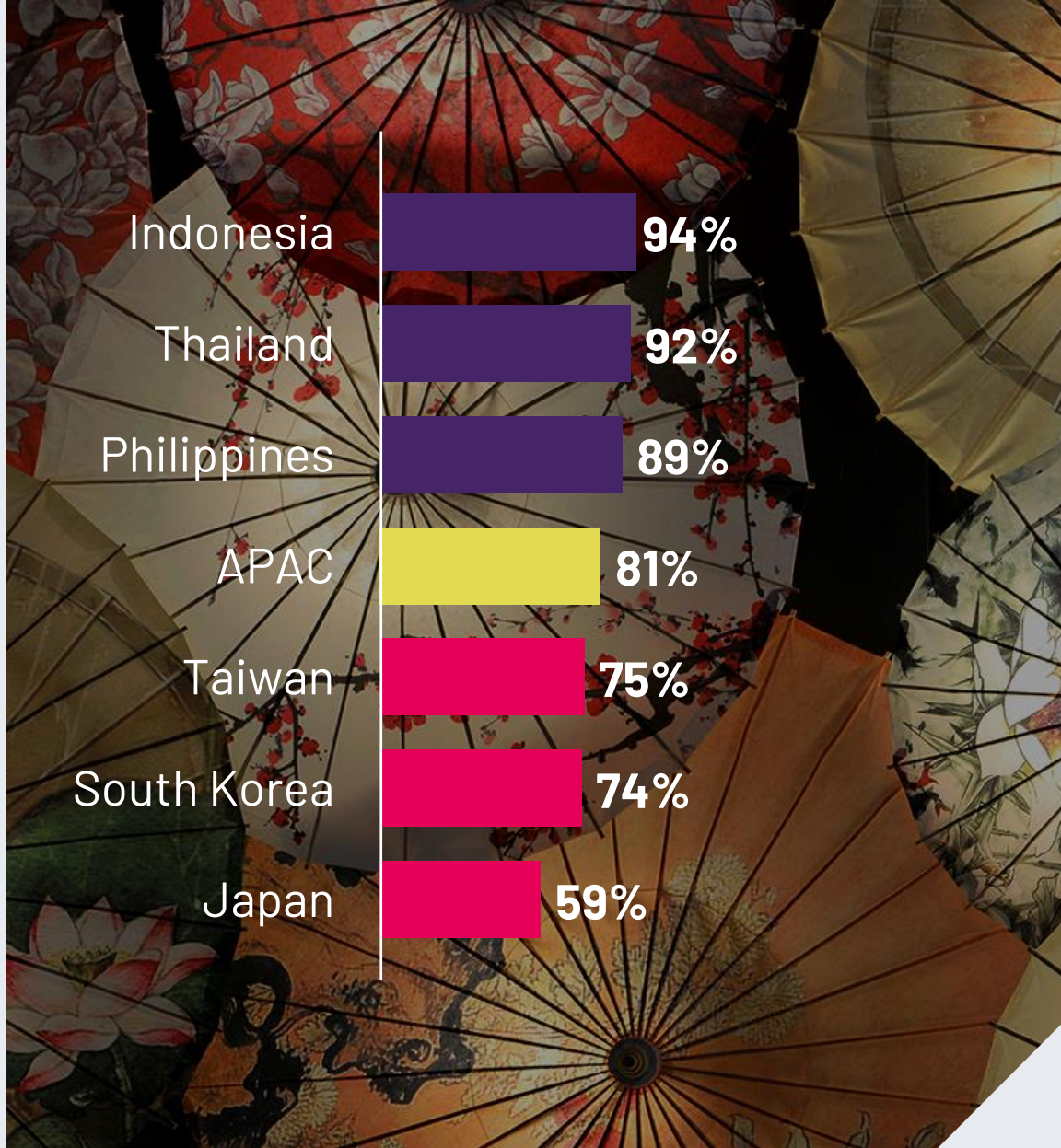
The widespread concern about data privacy may be largely influenced by recent high-profile data breaches involving government agencies and companies.

RETREAT TO OLD SYSTEMS

In the region as we head into a new world living with AI, there is a desire among some to turn back the clock

57%

People in APAC say they would have preferred to have grown up when their parents were children

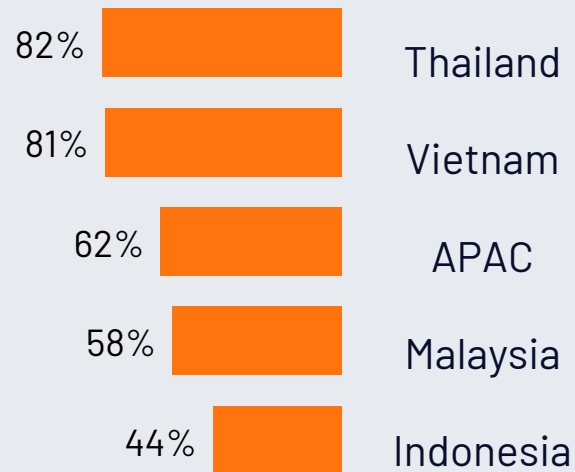


While many express a desire to turn back the clock, opinions on the **importance of traditions in society** are different

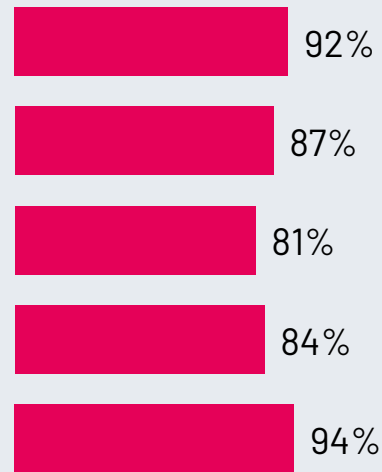
*Ipsos suggest that countries like Taiwan, Japan, and South Korea, which emphasize a lower level of importance of traditions, are inclined to **move away from traditional hierarchical societies** in favor of more egalitarian and casual social structures.*

Traditional values hold great importance across Southeast Asian countries, but the attitude towards women's leadership roles vary.

More female in leadership would improve outcomes



Traditions are an important part of society



CLIMATE CONVERGENCE

This year is expected to be the hottest year on record globally, breaking the previous record set only last year*

73%

in Asia Pacific say they are already doing all that they can to save the environment

** Report from World Meteorological Organisation*

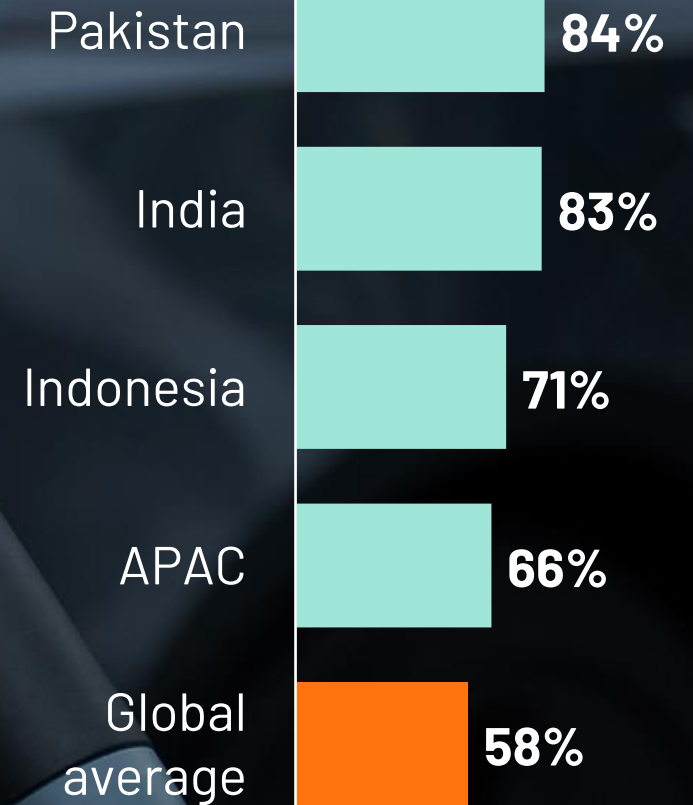
75%

in APAC say that companies do not pay enough attention to the environment

*With most APAC consumers perceiving that **companies neglect environmental issues**, Ipsos predicts that this sentiment may arise from corporate CSR initiatives that either ignore climate change or inadequately communicate their efforts to the public.*

APAC consumers emphasize the importance of transitioning to electric vehicles

Countries such as Pakistan, India, and China, which support the transition to electric vehicles, are often **noted for their significant pollution levels.**



Understanding these trends, then what next for brands?



Generally, in APAC, the **enthusiasm for AI** is tempered by **significant data security concerns**.

Brands should prioritize **clear communication of strong privacy measures** to build trust and maintain consumer confidence, capitalizing their receptiveness on the new tech on personalization.



Following the emphasis on privacy, brands can also **blend tradition with innovation**. By capitalizing on the nostalgia trend, they can **integrate elements of local values & traditions** with modern advancements.

This strategy opens up engagement that resonate with consumers' yearning for simpler times.



Lastly, Indonesian brands should **empower consumers to contribute to environmental solutions**.

This can be achieved through **innovative policies** and **sustainable packaging**, as consumers are receptive to initiatives that foster environmental stewardship.

Navigating the balance of innovation, tradition, and sustainability

TECHNOWONDER

- How can your brand clearly communicate strong privacy measures to Indonesian consumers?
- What strategies will balance AI personalization with privacy concerns?
- How can you balance automation with the human touch in your customer interactions?

RETREAT TO OLD SYSTEMS

- How can your brand blend nostalgia with innovation to appeal to both older and younger generations?
- What role do traditional values play in your brand's innovation & communication?
- Can blending tradition and modernity offer a unique competitive advantage for your brand?

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- How can your brand engage consumers in environmental efforts?
- What role can sustainable packaging play in differentiating your brand?
- How might you create engaging, fun experiences that also promote environmental awareness and action?

Access our full IGT report



Ipsos Global Trends 2024



**Ipsos Global Trends 2024:
Understanding Asia**

THANK YOU

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GLOBAL TRENDS 2024 SIGNALS IN INDONESIA

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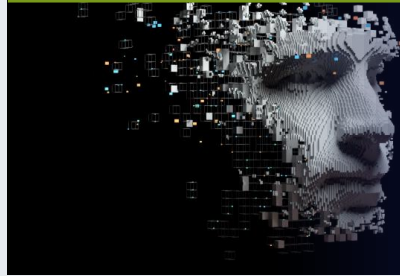
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Three prevailing consumer trends in Indonesia

Explore the intersection of **three prevailing trends** shaping Indonesia's market landscape.

These macro-trends are mirrored in the strategic moves of leading Indonesian brands, setting the stage for our exploration.

TECHNOWONDER



"AI innovations **transform digital interactions** and consumer experiences."

RETREAT TO OLD SYSTEMS



"Nostalgia drives brands to **revive traditional values** in modern products"

CLIMATE CONVERGENCE



"**Sustainability efforts surge** as Indonesia aligns with global climate goals through innovative practices."



Shaping Indonesia's Digital Future:

Digital advances are poised to significantly **reshape the dynamics between brands and consumers**, unveiling new possibilities for engagement and interaction, and transforming how businesses connect with their audiences in unprecedented ways.

Embracing AI: TikTok's algorithms are transforming brand-consumer interactions

In Indonesia, which boasts the largest **TikTok** audience globally with **157.6 million users***, TikTok's AI algorithms are able to predict user preferences, allowing brands to **deliver highly tailored content during live broadcasts**.

In an impressive demonstration of TikTok's potential, Indonesian creator **Mami Louise** achieved a record-breaking feat:

Earned **Rp 45 billion** in just one day's live session.



* Statista, July 2024



Revolutionizing Interaction: Indomilk's AI-Powered Campaign

Indomilk is redefining consumer interaction in Indonesia with its "Click to Get Riil" campaign, the **nation's first AI-generated marketing initiative**.

By collaborating with SNS Indonesia, Indomilk Steril offers 12 interactive pack editions, designed to create unique personalized experiences.

Consumers can scan the QR code on the packaging to initiate an **AI-powered video call with Ariel**, the celebrated vocalist of NOAH Band, capturing special moments and enhancing brand connection through innovative technology.



Rediscover the Past: Brands are increasingly embracing nostalgia and traditions to connect with consumers on a deeper emotional level. By weaving elements past memories into their products and marketing campaigns, these brands evoke a sense of familiarity and comfort.



Nostalgia in Branding: Indonesian brands are tapping into nostalgia to resonate with consumers

Garuda Indonesia has **revived its classic plane liveries**, evoking memories of the airline's storied past and establishing a connection with long-time customers.

Similarly, **Mayasari Bakti** has **reintroduced vintage designs** on its buses, reminding riders of the traditional public transport experience.

Indomie, a beloved instant noodle brand, has also embraced nostalgic themes by **reintroducing retro packaging and flavors** that harken back to simpler times.

Revitalizing Tradition: Products associated with older generations, are being rebranded to appeal to younger audiences

Brands such as **Tolak Angin**, **Freshcare**, and **Safecare** are **modernizing their image through fresh packaging and contemporary marketing strategies**, making these age-old remedies attractive to a new demographic.

This shift aligns with a broader trend where younger Indonesians are increasingly embracing traditional products while enjoying their perceived health benefits. As a result, these rebranded products are gaining popularity among the youth.





Climate Consciousness in Policy:

Indonesia's commitment to **Net Zero Emissions** by **2060** is driving brands to align with governmental climate objectives, marking a pivotal shift towards sustainability in the business sector.



Allas offers a circular packaging service with a membership system, aiming to encourage the food and beverage industry to move away from single-use packaging.



Papel Wrap is a recyclable paper-based protective packaging, made from 90% virgin pulp and 10% recycled pulp, resulting in less waste and more energy-efficient production processes.



Plepah transforms unused areca palm sheaths (pelepah pinang) into eco-friendly food packaging that naturally decomposes within 60 days.

Sustainable Packaging

Brands like **Papel**, **Plepah**, and **Allas** are at the forefront of sustainability by offering innovative solutions such as **eco-friendly packaging and biodegradable materials**.

Their commitment sets a benchmark for other brands aiming to contribute positively to Indonesia's ecological future.

* Image retrieved from Geometry.ID

Green Financing: Catalysts for Sustainable Development

Indonesia's green financing is rapidly advancing as a crucial tool for combating climate change and fostering sustainable development.

Rp 21.8 trillion total green bonds value as of 2024

The rise of **green bonds**, with around 17 listed highlights the commitment of state-owned banks like **Bank Mandiri**, **BNI**, and **BRI** to fund environmentally beneficial projects.

Additionally, **Indonesia's pioneering launch of the world's first green sukuk** in 2018 demonstrates a strategic alignment with the UN SDGs, channeling resources into climate mitigation and sustainable initiatives.

Riding the Electric Wave

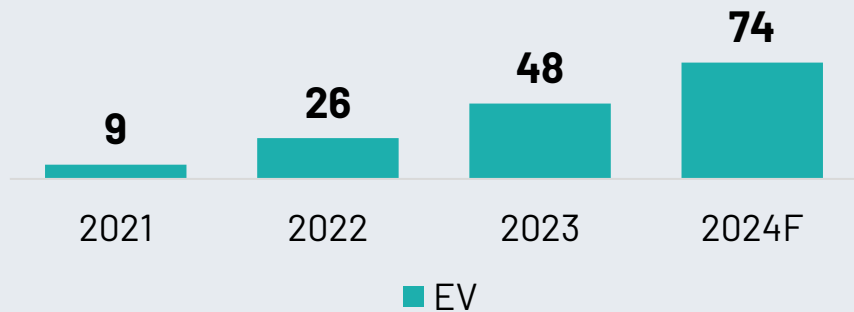
Electric 2-Wheelers in Indonesia are growing at a remarkable **102% CAGR** over the past four years, far outpacing the 8% growth of its combustion engine counterpart.

Ipsos predict that this surge is fueled by consumer's environmental awareness, supportive policies, along with the **adoption of EV 2Ws by ride-sharing companies like Grab.**

This trend underscores a significant shift in consumer preferences towards sustainable transportation.



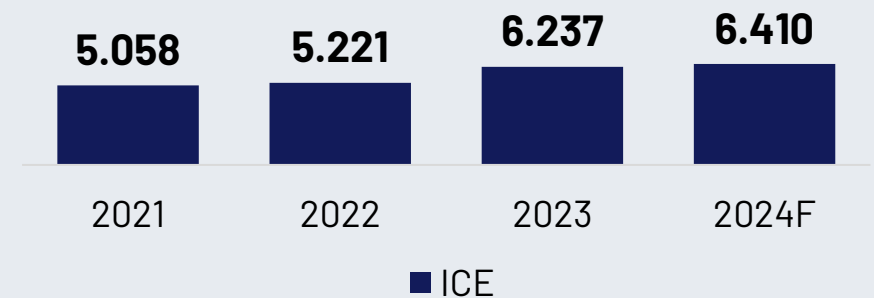
EV 2W Sales in Indonesia*
in thousands unit



102%
CAGR

ICE 2W Sales in Indonesia*
in thousands unit

8%
CAGR



* Ipsos Research, October 2024



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The three trends are profoundly shaping the Indonesian consumer landscape, influencing how brands **innovate**, **engage**, and **sustain**.

As we navigate these transformative times, it prompts us to ask: **what role will you play in shaping the future of Indonesia's market dynamics?**

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