

# PwC's Voice of the Consumer 2025

## Indonesian consumer key takeaways:

**1.**  
Half of Indonesians are worried about the economy and living costs, resulting in buying less and buying cheaper

### Top Potential threat/risk in the next 12 month

Economic instability and cost of living

Indonesia

50%

APAC

42%

Global

44%

In response, they plan to buy cheaper alternatives (63%) and plan meals ahead of time to reduce impulse spending (56%).

**2.**  
Health concerns are rising in Indonesia; additives, preservatives and processed foods are top of mind

### Concerns about food

Indonesia

SEA

Global

The levels of additives or preservatives in my food

72%

63%

57%

Health risks associated with ultra processed foods

71%

67%

63%

Consumers are expecting food companies to support this through healthier products (60%) and making easier to understand health benefits of products (58%).

**3.**  
Climate concerns are growing as more consumers choose eco-friendly packaging and pay for sustainability

57%

opt for eco-friendly packaging product

71%

would pay more to support environment

62%

worries about climate change, but don't think about it regularly

Consumers are aligning their purchasing decisions with environmental values, but this does not always show consistently in their consumption behaviour and willingness to pay.

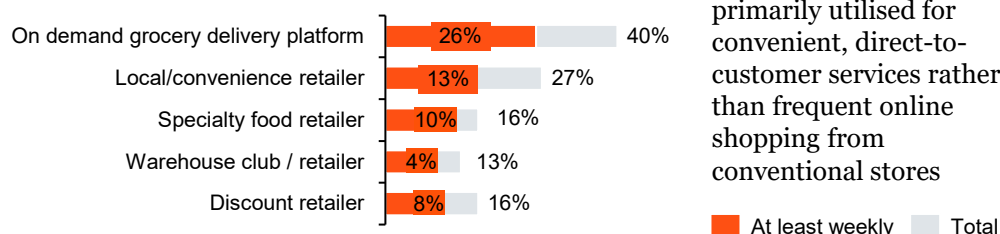
**4.**  
Older generations prioritise fresh ingredients and meal planning, while Gen Z prefers budget-friendly brands

Food habits and preferences	Gen Z	Millennial	Gen X
I buy fresh ingredients:	41%	48%	51%
I plan meal in advance:	26%	32%	35%
I buy budget/value brands	36%	30%	35%

Different generations respond uniquely to marketing strategies based on their values and habits

**5.**  
On demand grocery is seeing success in online, while physical retailers' online channels are lacking traction

#### Grocery shopping frequency by online channels



Online channels are primarily utilised for convenient, direct-to-customer services rather than frequent online shopping from conventional stores

**6.**  
Despite optimistic adoption of AI in day-to-day life, scepticism remains about personal data protection

#### Comfort with using AI for tasks

<b>61%</b>	Personalised workout plan
<b>61%</b>	Custom diet and nutrition plans
<b>60%</b>	Meal planning and suggestion

#### Concern about AI technology

<b>92%</b>	Increased risk of being hacked/scammed/cyber threats when using AI
<b>91%</b>	How AI development could infringe on my personal and data privacy
<b>89%</b>	Inaccurate information & Lack of regulation/governance for AI

Indonesian consumers are highly receptive to AI and technology, readily adopting wearable devices and embracing AI for personalised wellness and meal planning

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