

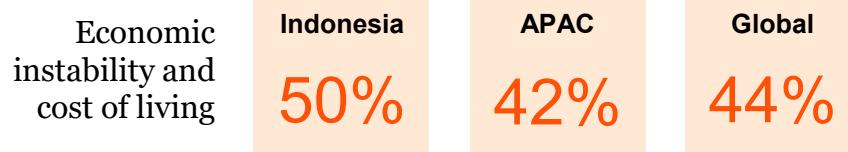
PwC's Voice of the Consumer 2025



Indonesian consumer key takeaways:

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

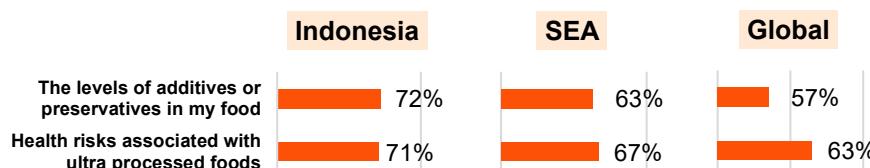
Top Potential threat/risk in the next 12 month



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

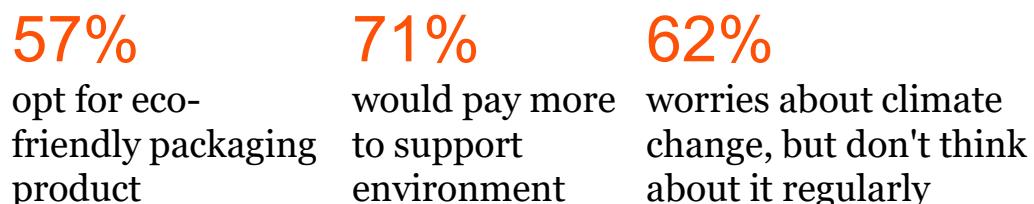
2.
Health concerns are rising in Indonesia; additives, preservatives and processed foods are top of mind

Concerns about food



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



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

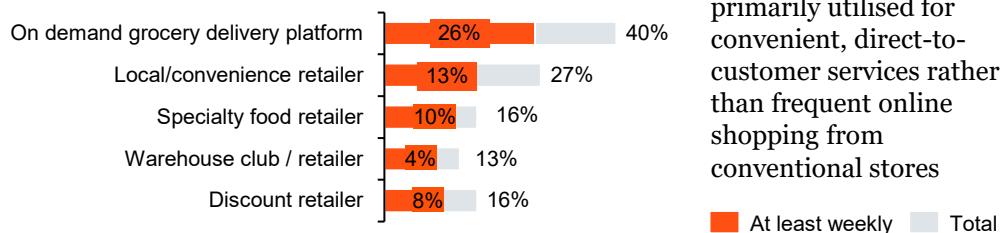
Food habits and preferences	Gen Z	Millennial	Gen X
I buy fresh ingredients:	41%	48%	51%
I plan meal in advance:	26%	32%	35%
I buy budget/value brands	36%	30%	35%

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

■ At least weekly ■ Total

6.

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

Comfort with using AI for tasks

61%	Personalised workout plan
61%	Custom diet and nutrition plans
60%	Meal planning and suggestion

Concern about AI technology

92%	Increased risk of being hacked/scammed/cyber threats when using AI
91%	How AI development could infringe on my personal and data privacy
89%	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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