

## 5 ASIAN TRENDS FOR 2019

Five powerful consumer trends. Five opportunities.  
Are you ready?

Here we go. If you plan to make waves in Asia in 2019, then consider running with one (or more!) of these five emerging consumer trends:

### 1. ANTI-AFFLUENZA

Asian consumers are solving for happy

### 2. C-COMMERCE

Chinese retailers are setting expectations for the best of offline and online

### 3. ACCESSIBLE ASIA

In 2019, disabled people can no longer be ignored

### 4. SINGLES NOT ALLOWED

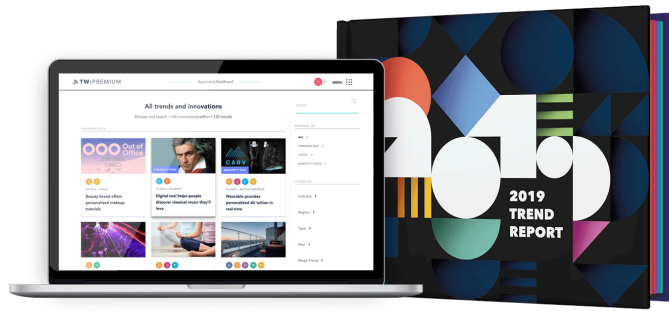
Asian consumers wake up to the urgent issues around single-use products

### 5. E-RESPONSIBILITY

Irresponsible tech brands and consumers catch up to their E-RESPONSIBILITY

Regular readers can dive straight in. New readers, here's the deal. The brands and organizations living these trends are *already* setting consumer expectations. You can too. As you read this report, keep asking yourself: how will these trends shape the expectations of *our* customers? What opportunities will the new behaviors they reflect present to *our* organization?

Read. Share. Discuss. But then far more importantly, **do** something with these trends! Good luck!



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## 1. ANTI-AFFLUENZA

Asian consumers are solving for happy

After decades of economic growth, rising numbers of Asians are no longer primarily focused on pursuing material wealth. On the contrary, the pressures of progress are catching up: overwork, mental health issues, apathy, and more. In 2019, many Asians comfortable with their economic status will shift their primary focus to solving for happiness and wellbeing.

### Why Now?

CRAZY RICH ASIANS

In the run up to this inevitable slowdown (IMF), Asia's economic boom gave the region the world's fastest-growing billionaire population. In 2018, for the first time, Hong Kong replaced New York as home to the highest number of ultra-rich people (WealthX).

## PRICE OF PROGRESS

However, growth isn't free of consequences. 45% of urban Thais are extremely stressed due to bread-and-butter issues (Thai Mental Health Department, September 2018), while the happiness level in China is lower than it was in 1990 (World Happiness Report 2018).

## THE NEW WEALTH

Latching on to various cultural touchpoints, from 'zhong yong' (the age-old Confucian philosophy to 'maintain balance and harmony') to Japanese decluttering guru Marie Kondo (re-popularized by Netflix), Asian consumers are looking for new markers of well being.

## Examples



DINGLAN EXPERIMENTAL MIDDLE SCHOOL – School offers additional leave to teachers

January 2019 saw the Dinglan Experimental Middle School, located in Zhejiang province, China, extend its 'happiness' initiative to cover all of its teachers. Under the initiative, teachers are encouraged to take two half-days of leave per month to spend time with family. The previous scheme extended benefits only to teachers with children. According to the school's principal, the scheme is intended to alleviate the stresses placed on teachers, claiming that happy teachers result in happy students.

RIVERBEND SCHOOL AND DELHI GOVERNMENT – School designed like a village to boost happiness  
Plans for the Riverbend School were unveiled in March 2018. Located in rural Chennai, the school's goal is to teach children how to be happy, rather than offering a standardized curriculum. The school layout was designed to encourage socializing, while facilities like an ideation lab, a meditation room and a test kitchen were included to prioritize emotional intelligence. In July 2018, Delhi's government also introduced happiness classes into schools to boost student wellbeing. The classes are free from exams or textbooks, and focus on meditation, relaxation and creativity. According to World Health Organization data, one in four children aged 13 to 15 in India suffer from depression.

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## Your response?

### SPREAD THE MESSAGE

In 2019, as Asian consumers shift further away from overworking (and overspending) in pursuit of products and flashy experiences as a signal of status, is your brand's voice aligned with the pursuit of happiness?

### GLASS BOX BRANDS

Governments are already taking action. The government of Japan encourages companies to give employees Monday mornings off work, while in South Korea computers are shut down early to fight overwork. What will it look like as more brands step in? Consider your internal culture as a start!

### EASY INDULGENCES

Sometimes, stressed consumers just need to indulge a little! What is your consumers' preferred mode of escape, and how can you help provide or facilitate it? Ele.me and Bilibili partnered up to make it easier for anime fans to chill at home.

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## 2. C-COMMERCE

Chinese retailers are setting expectations for the best of offline and online

In 2019, global consumers will wake up to new retail realities set by innovators in the world's largest retail market. Chinese brands are rolling out a model that

harnesses AI, mountains of consumer data, and in-store technology to deliver a more efficient, targeted and seamless offline experience. Radical expectations will come knocking at your door!

## Why Now?

### YEAR OF THE LEAPFROG

In 2017, e-commerce in China grew three times faster than physical retail (Chinese National Bureau of Statistics, January 2018). Without a legacy brick-and-mortar retail landscape, China's e-commerce solutions are enjoying faster adoption rates.

### BRICK-AND-MORTAR: TRANSFORMED

Offline retail still makes up 80% of retail in China (Oliver Wyman, April 2018), so e-tailers like Alibaba and JD are chasing nationwide growth through the radical transformation of physical stores. It helps to have the support of the CPC!

### RETAIL AS A SERVICE

The major players are combining a wealth of shopper data (1.4 billion people is a solid data set) and technological capabilities to roll out 'retail as a service' to thousands of small businesses. Alibaba's 'New Retail' and JD's 'Boundaryless Retail' strategies will supercharge the landscape.

## Examples



**TMALL & INTERSPORT** – Tmall partners with retailer to supercharge the shopping experience  
Tmall partnered with European retailer Intersport to open a Beijing store in May 2018. The store utilizes Alibaba's New Retail infrastructure which covers visitor insights, supply chain management, store technologies, smart logistics and electronic payments. Store visitors can get styling advice from an AI assistant-powered mirror, have purchases delivered to their homes within two hours, and play interactive games. When certain products are picked

**JD.ID** – Etailer opens its first smart store outside China  
August 2018 saw Chinese e-tailer JD open a staffless JD.ID X-Mart store abroad for the first time. Located in Jakarta, the store uses AI, image recognition, RFID and facial recognition to track shoppers' movements. This is also the first AI-powered store to open in Indonesia. The X-Mart offers beauty, FMCG, and fashion products, which customers can purchase via an unmanned, automatic checkout system.

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partner Tech Data; 20 Hung + kiosks are due to be installed.

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## Your response?

### WHAT HAPPENS IN CHINA...

Yes, Chinese internet giants largely drive this trend. However, it is setting international expectations. In today's global brain, what happens in China does not stay in China. See the examples from Indonesia and Singapore.

### EXPERIENCE IS KING

Alongside convenience, every savvy retailer knows that shoppers are after experiences. Think about how your smart retail initiatives can go beyond faster, easier, cheaper. Honestbee's Habitat makes grocery shopping a fun experience, fitted into today's consumer lifestyles.

### BEST OF BOTH WORLDS

Not a store or directly involved in some form of retail activity? This trend still spells an opportunity for you. What does the best of online and offline look like for the products, services, and experiences your brand offers?

## 3. ACCESSIBLE ASIA

In 2019, disabled people can no longer be ignored

Asia has by far the largest number of people with disabilities and impairments in the world. For years, they remained invisible, discriminated against or in chains. But rising expectation around the fair treatment of all marginalized groups, along with the 2018 Asian Para Games and upcoming Paralympics

mean the scene is changing. In 2019, brands can no longer overlook these individuals.

## Why Now?

### OPPORTUNITY-RICH REGION

APAC is home to 690 million people with disabilities (United Nations, September 2018). And the number will only increase with an aging population, natural disasters, and poor working conditions in many parts of Asia. All too often invisible to society, many of their needs are currently unmet.

### STORIES HIGHLIGHTED

But the awareness is rising. Everywhere across Asia, the stories are getting louder: a wheelchair user denied entry to a mosque in Indonesia, activists tackling Bangkok's Mass Transit System, the Japanese government's inflated numbers of staff with disabilities, and questions around Hong Kong's banks and their accessibility.

### AMPLIFIED IN ASIA

The 2018 Asian Para Games amplified the voice of people with disabilities and brought their rights (or the lack thereof) into attention. Asian consumers now demand governments and brands to provide better solutions and representation for this marginalized group.

## Examples



**DAWN VER.β** – Tokyo cafe is staffed by robots controlled by disabled people

A café in Tokyo opened its doors in November 2018 for a trial run with its new recruits – robots wirelessly controlled by paralyzed people, using tablets or computers. Located in the headquarters of nonprofit Nippon Foundation, the DAWN ver.β café's robot waiters could take orders, bring customers food and drink and respond

**ALIBABA** – Silicone overlay helps blind consumers use their smartphones

Alibaba have developed a smart silicone overlay to help a smartphone screen, users can press the sheet's three buttons to access shortcuts for command commands – 'go back' or 'send' for example. The buttons' functions change, depending on which app is being used, and the silicone screen allows users to listen to text-to-voice readouts. The RMB 0.25 (USD .36) device was developed

**SAVLON** – A impaired

Global health organization in January 2019. The organization is an antiseptic Association for the Development of the Asia-Pacific region, pledged to change the health care system in the region through workshops in the country. The campaign,

by Alibaba's Damo Academy initiative, and will roll out in 2019. man who, after hurting himself while cooking, is unable to locate a bottle of Savlon in the cupboard by touch. Indonesia Participant unemployed

## Your response?

### REIMAGINE YOUR CX

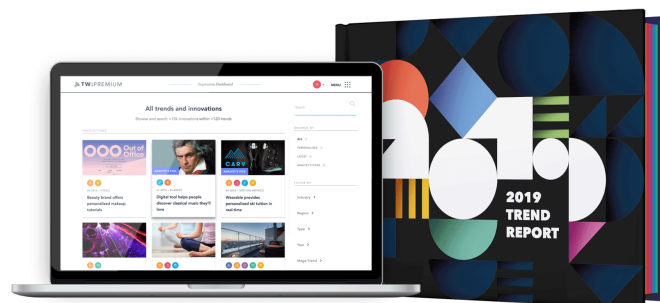
Take an existing offering and reassess the consumer journey. In which stage are people with disabilities or impairments excluded? Which part of the CX must you reimagine or tweak to be more inclusive? See Alibaba's silicone smartphone overlay.

### BUILD BRIDGES

As you serve the needs of disabled people with your offering, consider if you can, at the same time, raise awareness and educate others. One powerful approach is to connect those who are often left out or on the fringes with larger society. DAWN ver.β is a perfect example of that.

### LEAVE A LEGACY

With the upcoming Tokyo 2020 Paralympic Games, the stage is set once again for smart brands to seize this golden moment and offer consumers the accessibility they deserve. From retail, to transport, to hospitality, opportunity abounds. What legacy will you leave beyond the games?



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In the coming weeks and months, they'll be using the platform to ensure their plans remain deeply aligned with what their customers want next.

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## 4. SINGLES NOT ALLOWED

Asian consumers wake up to the urgent issues around single-use products

2018 was the year sustainability finally entered mainstream awareness in Asia, thanks to a barrage of news headlines on waste, as well as a smattering of zero-waste retail concepts launching across the region (read more about that in ZERO-WASTE SHOPPING, featured in The Future of Retail). In 2019, newly-enlightened consumers will welcome brands that educate, encourage, and incentivize them to depart from the single-use lifestyles they have been long accustomed to.

### Why Now?

#### WORSENING PROBLEMS

Six countries in Asia contribute to 60% of all global plastic waste in the oceans (UNEP,2018). In 2018, Boracay and Maya Beach were shut off for rehabilitation and a whale died swallowing 80 plastic bags in Thailand.

#### GROWING INTOLERANCE

After China stopped importing global waste in January 2018, the world scrambled and looked to Southeast Asia for alternative solutions. Then SEA followed China's footsteps. Across Asia, there is a growing intolerance of waste.

#### BIG BRAND RESPONSIBILITY

Some of the world's biggest companies including Unilever, P&G, Coca-Cola, PepsiCo and Danone joined forces and pooled USD 90 million into a fund to find solutions to plastic pollution in Asia. The pressure is real: every brand must act.

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## Examples

AKYRA TAS SUKHUMVIT BANGKOK – Plastic-free hotel opens in Bangkok

Opened in June 2018, the Akyra TAS Sukhumvit Bangkok is Asia's first single-use plastic-free hotel. On arrival, guests are offered stainless steel water bottles, which can be refilled at water dispensers located on every floor. Bathroom amenities are provided in locally-manufactured pottery containers, and biodegradable plastic bags are used in all bins. The move was part of a wider initiative from the Akyra Hotel Group, which pledged to become plastic free by 2020.

ELE.ME – Food delivery app launches edible chopsticks

May 2018 saw China-based Ele.me launch edible chopsticks to replace the food delivery app's usual disposable chopsticks. Made from flour, butter, sugar and milk, the chopsticks are available in three flavors; green tea, wheat and purple sweet potato. The utensils can be eaten or will degrade within one week if thrown away.

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## Your response?

### THINK BEYOND PLASTIC

The problem is not single-use plastic but a single-use mindset. So can you help incorporate plastic-free solutions into a lifestyle like Akyra TAS Sukhumvit? And think beyond plastic - what other single-use products (chopsticks! flowers!) can you repurpose and breathe new life into?

### CROWDSOURCING MEETS CONVENIENCE

Surabaya makes it ultra-convenient for people to play their part: as well as depositing waste at terminals, passengers can literally 'pay' for their tickets with trash on the bus! Can you make doing good as seamless?

### SHARE YOUR SOLUTIONS

It's simply not possible to solve the global waste issue alone. Generous and committed brands will think broadly about partnerships and collaborative solutions. Who can you partner with? Like P&G and Unilever, don't be afraid to reach out to your rivals!

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## 5. E-RESPONSIBILITY

Irresponsible tech brands and consumers catch up to their E-RESPONSIBILITY

Consumers wooed by the benefits of technology – from free messaging to validation on social-media – hardly stopped to think about the ramifications of their digital activities. Until, across Asia, a series of highprofile scandals surrounding data misuse, fake news and worse, brought the topic to mainstream awareness. In 2019, consumers will look for initiatives that give them greater security and peace of mind for their entire digital existence.

### Why Now?

#### HARD TO KEEP UP

The number of internet users in Asia has grown by 1704% since 2000 (Internet World Stats). In the 2017-2018 period alone, 224 million people came online for the first time (We Are Social). Consumers are going online faster than society can promote (or even define) digital literacy, guidelines and etiquette.

#### THE LOSS OF INNOCENCE

In 2018, the bubble of false security finally burst. The Cambridge Analytica incident affected 1.1 million Filipinos and 1 million Indonesians, ranking these two countries as the second and third most impacted globally (Facebook, April 2018).

#### DEATH BY FAKE NEWS

Consumers are waking up to the horrific consequences of digital illiteracy and virallyinclined communication channels. In India, between May and July 2018, hoax messages circulated on WhatsApp triggered incidents of mob lynching – with the lynchings of at least 24 people accused of being child kidnappers linked to the platform.

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### Examples

WHATSAPP & RELIANCE JIO – Touring show demonstrates the dangers of fake news

October 2018 saw WhatsApp partner with Reliance Jio, an Indian telco, to use street theater to educate people about the dangers of ‘fake news’. Visiting ten cities, the iconic WhatsApp green wagon played host to five actors who performed a short, funny play demonstrating how spreading misinformation online can stir up mob violence. This was the latest in a series of initiatives to curb fake news spread on WhatsApp. It has previously funded research into the topic, taken out full-page newspaper ads, instigated a multi-language radio campaign, and limited the reach of forwarded messages on the platform.

GOVERNMENT OF PAPUA NEW GUINEA – Government experiment bans Facebook for a month to research platform’s impact

May 2018 saw the Government of Papua New Guinea announce plans to ban Facebook for one month in an attempt to catch fake users and assess the effects of social media platform on the population. The communications minister announced the scheme following rising concern about wellbeing, productivity and security. Analysts will use the month to collect information about the website and identify fake accounts.

SWIPE – Block personal data  
SWIPECrypt offering personal data  
Participant share, and those user encrypted, companies  
Indonesia.

## Your response?

### IT’S A SCARY WORLD OUT THERE

Tech-driven issues include everything from kids unwittingly exposed to pornography to impaired eyesight from too much gaming. Of course, the Chinese government’s favorite solution is a censorship spree, but can you let consumers have some E-RESPONSIBILITY without having to give up all the perks?

### BRANDS OF THE HOUR

One immediate opportunity? Social media has been used to further political propaganda, such as in the Philippines and Thailand, and 2019 will be the year many Asian countries hold important elections. Can you help to provide a fair and unbiased social landscape?

### SPEAK TO THE HUMANS

It’s easy to jump to tech-powered solutions to this problem, but there are other options, too. WhatsApp debuted a touring show about ‘fake news’ in India, while Cameo Project launched a music video titled ‘Cek Dulu’ in Indonesia to promote digital literacy. You can make it fun!

## THE BIGGER PICTURE

The 5 trends featured here are important, but they represent just a small fraction of the consumer landscape.

Clients of our **Premium Service** have an instant global Trend Department at their fingertips. They have access to our entire Trend Framework, built around the 16 mega-trends that define modern consumerism. Beneath these sit 120+ actionable trends (the trends featured here, along with a host of others we continue to track), all illustrated with 19,000+ hand-curated, best practice innovations. If you're serious about trends, it's a no-brainer.

## OVER TO YOU

As always, we wrap up these annual Trend Briefings with a call to action...

While it's our job just to watch trends, ambitious business professionals should read this Briefing with only one thing in mind: how to *apply* these trends to create compelling new innovations that will delight your customers (and win new ones!).

So, what are you waiting for? Time to make 2019 your best year yet!

**Cheers! Proost! 干杯! Salud! Skål! 건배! Santé! Prost! Şerefe! Mabuhay! Saúde! Chok dee!**

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IT TAKES A TEAM

This Trend Briefing has many hands on it. A huge thanks to the team that pulled this together with such positivity and enthusiasm, especially: Vicky Kim and Nikki Ritmeijer (for design!), and also Maxwell Luthy, Vicki Loomes, Henry Mason, Alida Urban, Harry Metzger, Harvey Gomez, Jareth Ashbrook, Jonathan Herbst and Lisa Feierstein. THANK YOU!

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