

REPORT

The Gen Z brand leaderboard:

Who is leading today, and how do brands win across APAC in 2026?

/Research Reality



Powered by the YouGov panel

The insights in this report are fuelled by YouGov's consumer research panel, which has 30 million registered members from 55+ markets.

Every day, our members trust us with their data and opinions – enabling us to gain insights into behaviours and attitudes from people of all ages, backgrounds and beliefs.

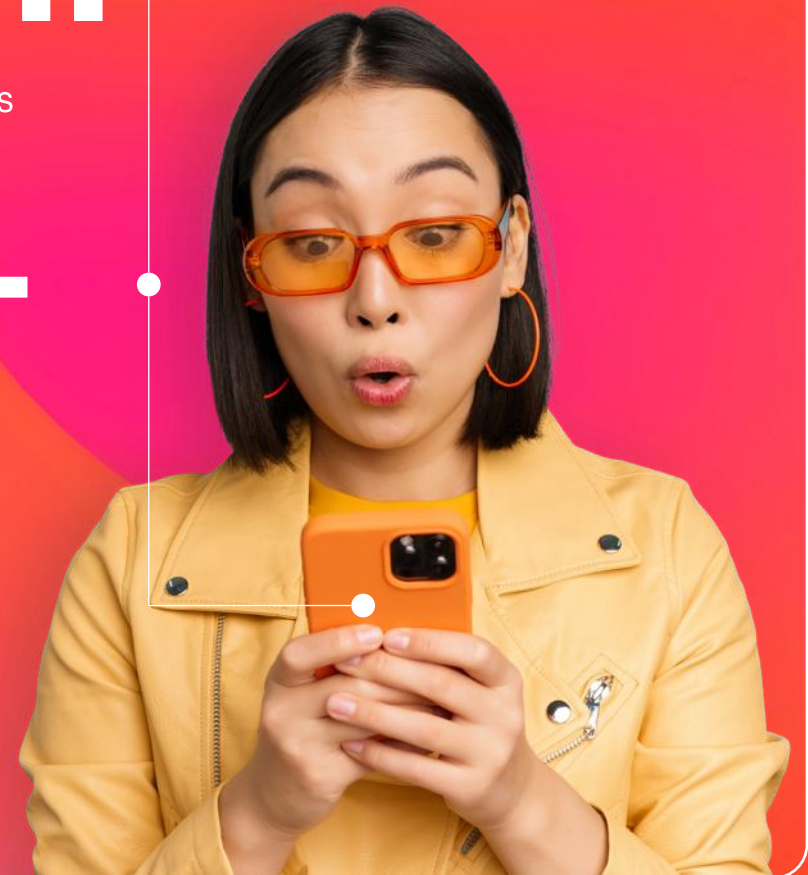
Inclusion is essential for our members, our clients, and our mission. We invest millions each year to ensure we can create truly nationally representative online samples and access hard-to-reach groups.

The Pew Research Centre concluded that YouGov “consistently outperformed” other online competitor samples for accuracy.

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30m •
registered
panel members

55+ •
markets



Content

- 1 Decoding Gen Z
- 2 Which brands made it to their leaderboard?
- 3 How can brands win over Gen Z in 2026?
- 4 Deep dives: Singlife and Samsung



Methodology

YouGov Profiles

YouGov's syndicated audience intelligence tool, used to analyze 300+ attitudinal statements to identify what defines Gen Z across Singapore, Indonesia, Malaysia, Thailand, and Vietnam.

YouGov BrandIndex

YouGov's always-on brand tracker, used to rank brands and uncover trends across 16 key brand health metrics among Gen Z audiences over time — spanning 50 industries in Singapore, Indonesia, and Thailand.

YouGov Surveys

Using our fast-turnaround survey solution, we surveyed 6,966 nationally representative respondents aged 18+, with census-balanced quotas on age, gender and ethnicity across Singapore, Indonesia, Malaysia, Thailand and Vietnam.

01 Decoding Gen Z

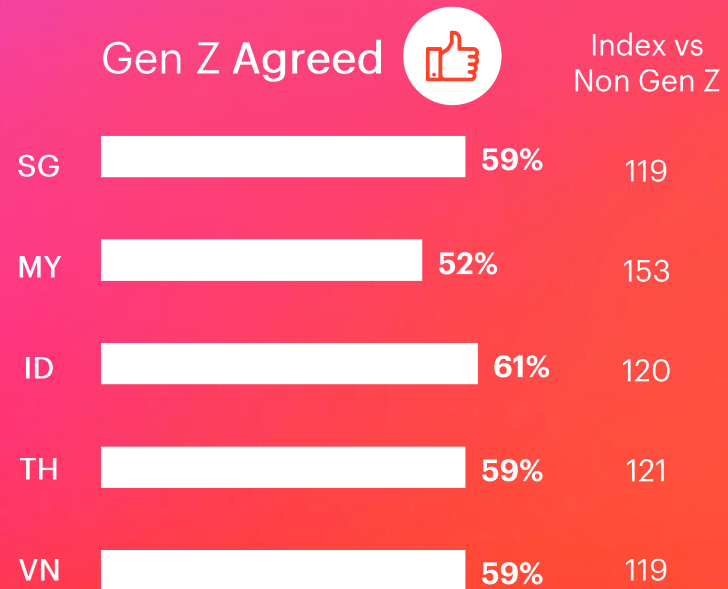
Top 5 insights that make them stand out

1 Security and self-expression shape Gen Z

Values such as financial security and career conflict with desires for freedom and self expression.



*I often
experience
anxiety about
my life"*



Regional

Most important values (n=2443)



2 From calling out to calling attention, Gen Z does both

Gen Z are more likely to call out the bad, but also more likely to broadcast what makes them feel or look good.



**Gen Zs are
2X
more likely to
post negatively**

Gen Zs are more likely to talk about brands when...

They feel proud of or want to talk about their purchase



Packaging or unboxing experience



Seeing others talking about it and wanting to join in the conversation



Z9: Which of the following best describes how frequently you share your opinions, experiences, or recommendations about brands - whether online (e.g., social media, reviews) or offline (e.g., conversations, word-of-mouth)?

Z11: Thinking about times when you've shared your opinions, experiences, or recommendations about a brand, how would you describe the tone of what you shared?

Z10: Thinking about times when you've shared your opinions, experiences, or recommendations about a brand, what were the main reasons that prompted you to do so? Please select all that apply.

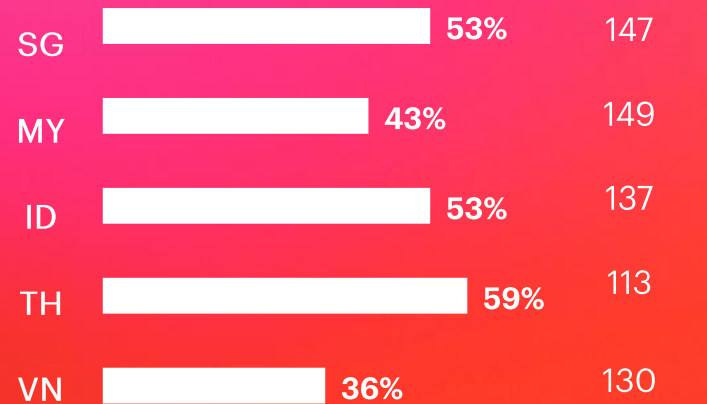
▲ Significantly higher than Non-Gen Z at 95% Confidence

3 Little treat culture

Gen Zs cope with daily stresses and their on-the-go lifestyle through small indulgences.

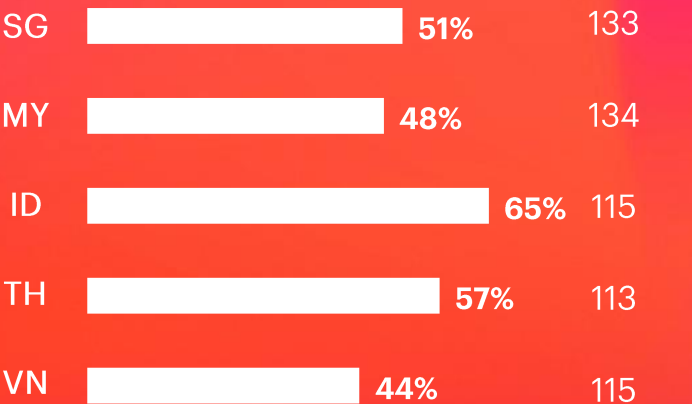
“I often treat myself to food that isn’t good for me”

Gen Z Agreed  Index vs Non Gen Z



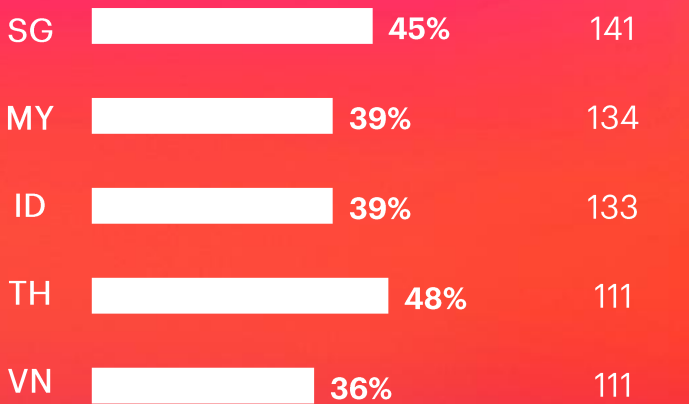
“I often snack between meals”

Gen Z Agreed  Index vs Non Gen Z



“My lifestyle doesn’t allow me time to prepare and cook food”

Gen Z Agreed  Index vs Non Gen Z

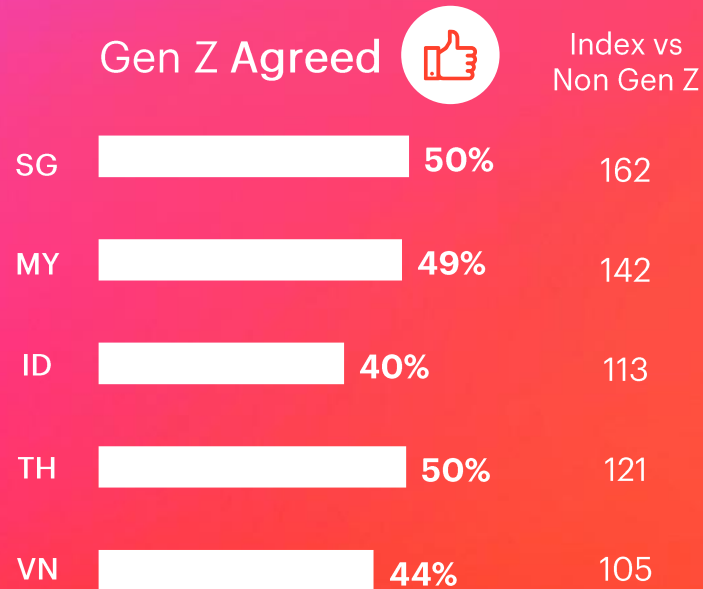


4 On the hunt for the next hidden gem

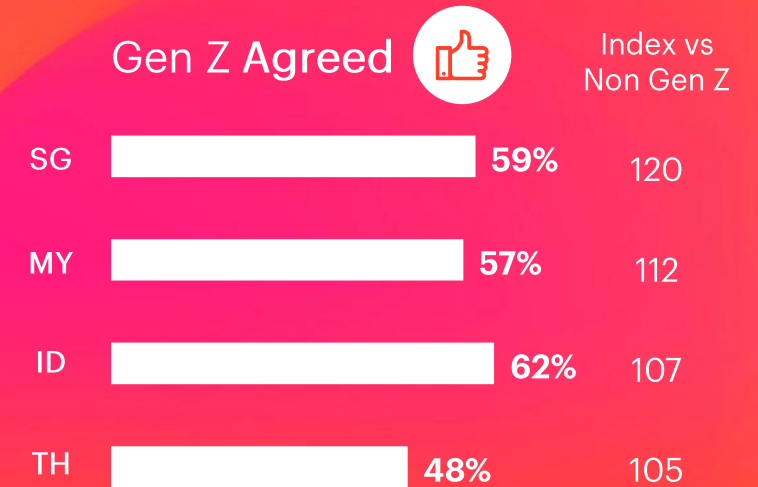
Gen Zs love being early adopters, looking out for new brands to try out.



I enjoy being one of the first among my friends to discover a new show, band or game"



"I like trying new brands"

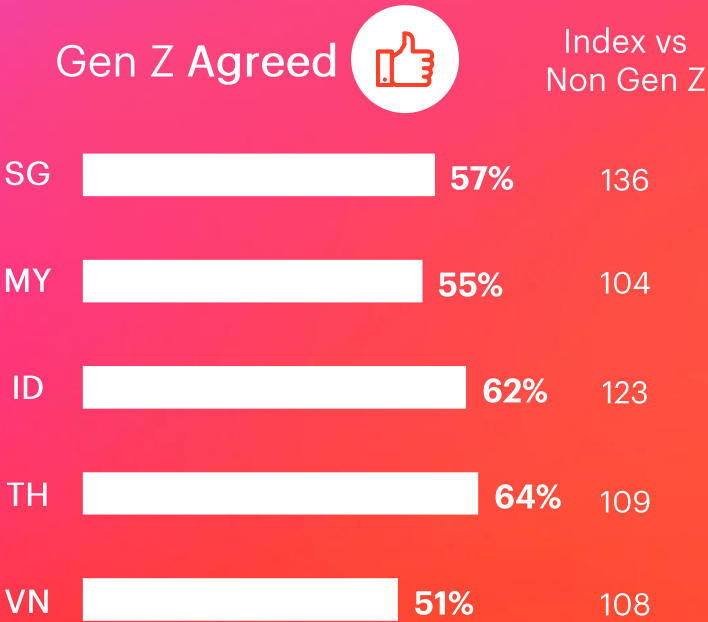


5 Gen Z drives digital retail

Gen Zs are online-first shoppers, much more so than non-Gen Zs.



I generally prefer to buy things online rather than in stores”



Regional

Purchases mostly made online:

Regional	Gen Z	Non-Gen Z
Fashion & Accessories	76% ▲	62%
Electronics & Appliances	60% ▲	57%
Lifestyle & Leisure	60% ▲	53%
Health & Beauty	55% ▲	46%
Home & Living	29%	27%
Groceries & Household Essentials	26% ▲	22%

YouGov Profiles Datasets, October 2025 | Gen Z: 18-28 y.o., Non-Gen Z: 29+ y.o.
Gen Z Leaderboard Omnibus study, October 2025 | Gen Z N=2443, Non Gen Z N=Z6: Thinking about your online purchases over the past 6 months, which of the following channels have you used to make your purchases?

▲ Significantly higher than Non-Gen Z at 95% Confidence

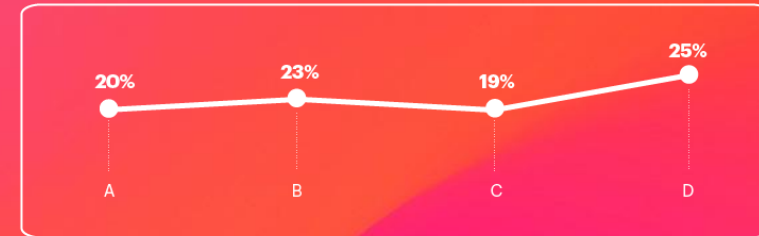
*Regional view includes respondents from SG, ID, TH, MY, VN

Real insights into what the world thinks

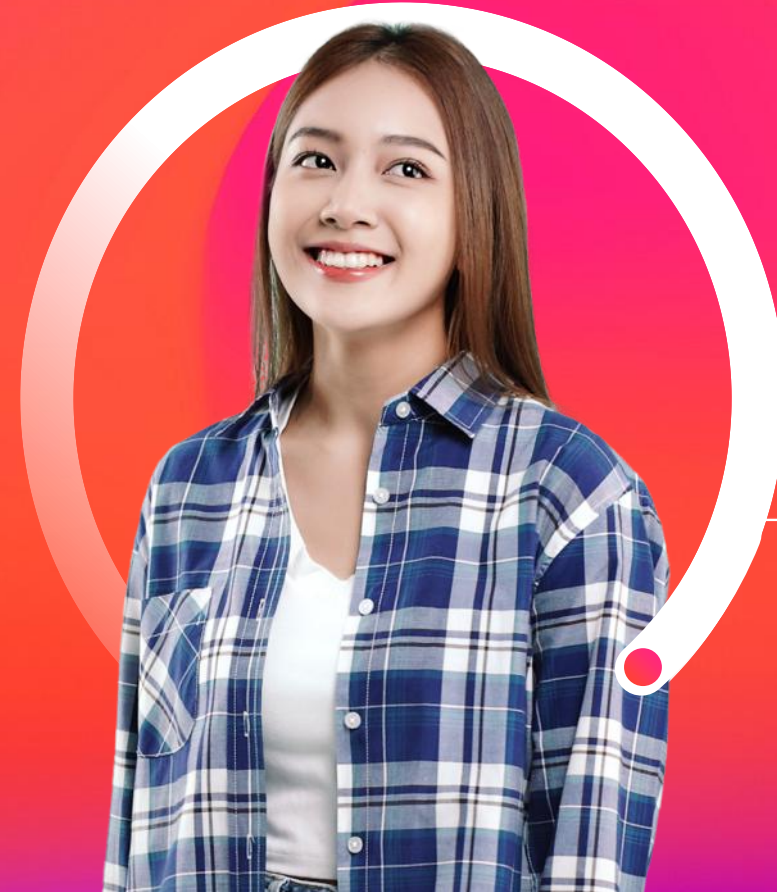
Our extensive, ever-growing source of connected, living data equips you with a rich understanding of your customers' complex lives. Understand what 29+ million registered panel members in over 55 markets are thinking, and harness real-time data for smarter, evidence-based decisions with our suite of products.

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Data results



37%
(vs. Nat Rep)



02 Which brands made it to the Gen Z leaderboard?

Top 10 brands recently used by Gen Z

Singapore

Rank	Brand	2025 Current Customer (%)
1	WhatsApp	74.9
2	YouTube	71.1
3	Instagram	70.3
4	Telegram	64.9
5	Google	60.6
6	FairPrice	58.7
7	Shopee	56.4
8	McDonald's	56.4
9	TikTok	50.5
10	Spotify	50.5

Thailand

Rank	Brand	2025 Current Customer (%)
1	YouTube	72.5
2	TikTok	72.4
3	Facebook	70.7
4	7-Eleven	69.1
5	Shopee	60.2
6	Instagram	57.4
7	Google	55.5
8	Line	53.2
9	KFC	52.7
10	Mama	50.4

Indonesia

Rank	Brand	2025 Current Customer (%)
1	WhatsApp	77.9
2	Shopee	77.1
3	Instagram	73.5
4	YouTube	70.6
5	Indomie	70.3
6	Indomaret	67.5
7	Alfamart	62.6
8	TikTok	62.6
9	Google	60.3
10	DANA	57.5

Top 10 brands gaining consideration among Gen Z

Singapore

Rank	Brand	2023 Consideration (%)	2025 Consideration (%)	Change
1	Trip.com	20.0	30.3	10.3
2	Nivea	15.4	25.3	9.9
3	Samsung	25.2	32.1	6.9
4	Trust Bank	12.6	18.6	6.0
5	TikTok	42.4	47.7	5.4
6	Singlife	13.2	18.0	4.8
7	Amazon Prime Video	10.7	15.6	4.8
8	Apple	36.1	40.7	4.7
9	Singapore Airlines	48.2	52.7	4.5
10	Dove	28.0	23.7	4.4

Thailand

Rank	Brand	2023 Consideration (%)	2025 Consideration (%)	Change
1	TikTok	53.1	67.5	14.3
2	Srichand	16.8	28.8	11.9
3	7-Eleven	48.8	59.6	10.7
4	Shopee	53.6	63.6	10.0
5	Vaseline	34.4	43.3	8.9
6	Thai Airways	21.8	30.5	8.7
7	Garnier	26.9	34.2	7.3
8	Makro	30.7	37.8	7.2
9	Samsung	27.1	34.2	7.0
10	KFC	50.0	56.7	6.7

Indonesia

Rank	Brand	2023 Consideration (%)	2025 Consideration (%)	Change
1	SeaBank	13.8	27.1	13.3
2	Mama Lemon	27.6	37.8	10.2
3	MR. D.I.Y.	19.3	28.9	9.5
4	Le Minerale	35.5	44.1	8.7
5	Marina	11.4	18.9	7.6
6	Richeese Factory	20.3	27.6	7.3
7	Solaria	13.0	19.1	6.1
8	Kopi Kenangan	15.7	21.7	5.9
9	Wardah	28.1	31.3	5.4
10	Ciptadent	10.8	16.4	5.3

Build a real-world picture of your brand

Gain a deep understanding of your brand health and performance against top competitors in your industry with YouGov's brand and campaign tracking solutions.

Track key metrics, measure campaign effectiveness, and access real-time insights into what people think, feel, and say about your brand.

[Explore brand tracking](#)



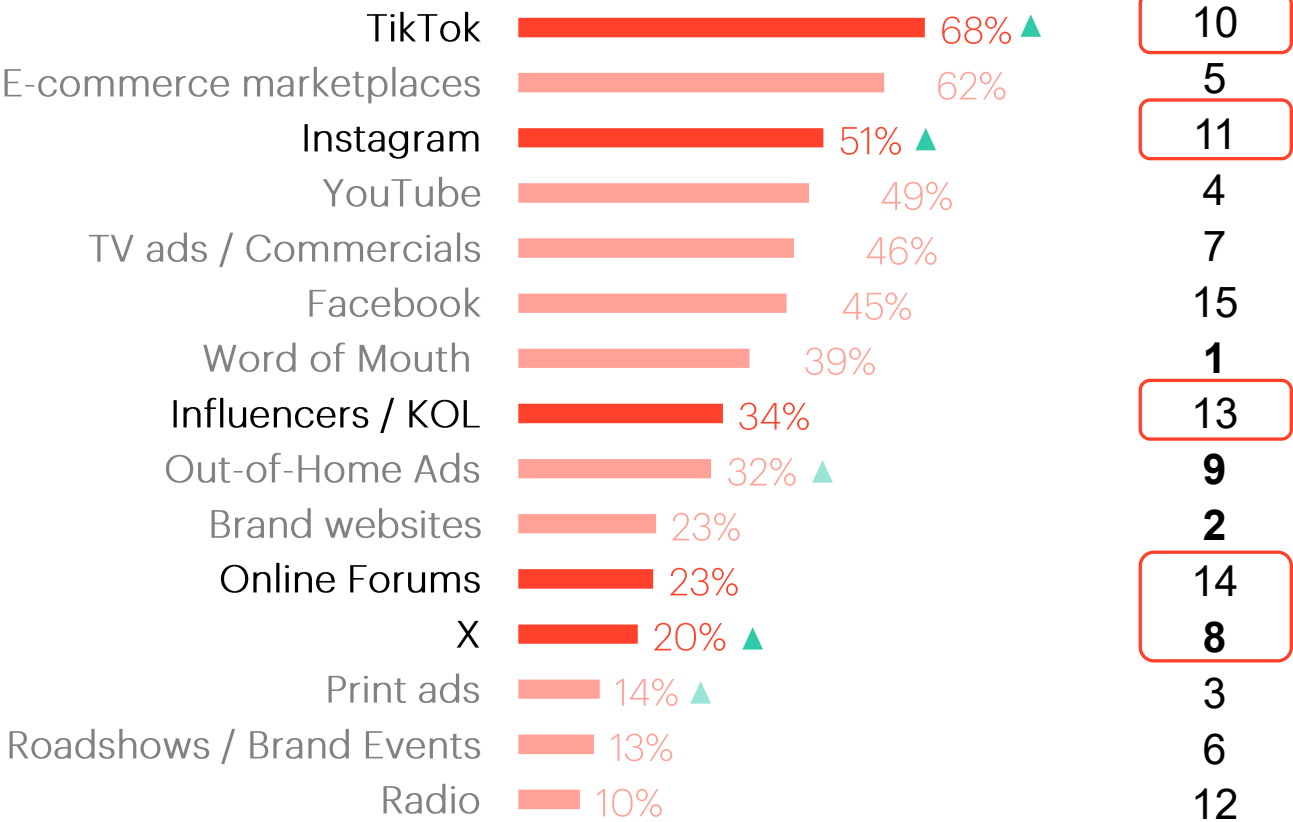
03 How can brands win over Gen Z in 2026?

Gen Z discovers brands on social, but trust is the bridge to conversion

Regional

Top channels used to discover brands

Channel Trust Ranking



Source: Gen Z Omnibus study, October 2025 | Gen Z, Age 18-28, N=2443
Z2: On which of the following channels do usually discover new brands?

▲ Significantly higher than Non-Gen Z at 95% Confidence

*Regional view includes respondents from SG, ID, TH, MY, VN

For Gen Z, trust and value alignments are non-negotiables

89%



of Gen Z have ever stopped purchasing from a brand because they lost trust in it

What would make Gen Z lose trust in a brand?

17%



of Gen Z would lose trust in a brand after a change in brand values or direction, vs 14% of non-Gen Z

16%

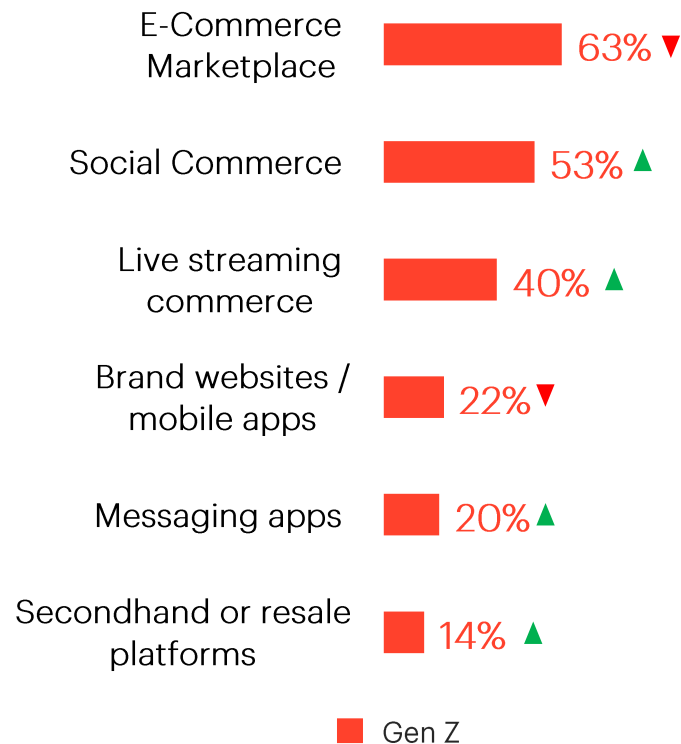


of Gen Z would lose trust in a brand because of unethical business practices, vs 14% of non-Gen Z

Interactive commerce drives Gen Z purchase behaviour

Regional

Top channels for online purchases (n=2443)



63% of Gen Z have purchased something via Livestream in the past 3 months, vs 54% of non-Gen Zs

79% of Gen Z have purchased something via Social Commerce in the past 3 months, vs 70% of non-Gen Zs

S-Commerce: TikTok Shop, Instagram Shops etc.

▲ Significantly higher than Non-Gen Z at 95% Confidence



Deep dive:

How Singlife and Samsung impressed Gen Z



Singlife's localised storytelling and commitment to customers vibed with Gen Z



Jetstar Asia to cease operations on July 31; over 500 employees in Singapore affected

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22 Sep 23:
The Dream
brand film

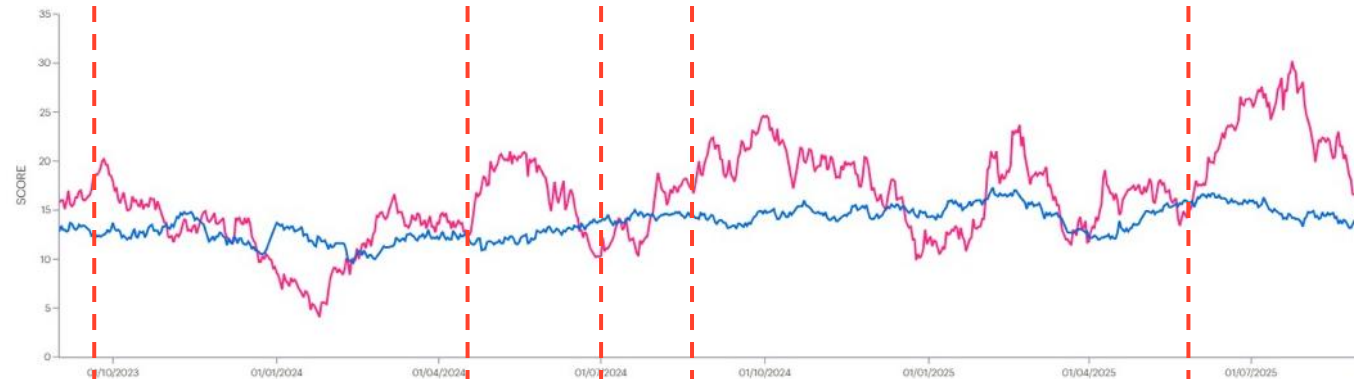
6 Apr 24:
Pop up at Seedly
Personal Finance
Festival

1 Jul 24:
The Dream
brand film

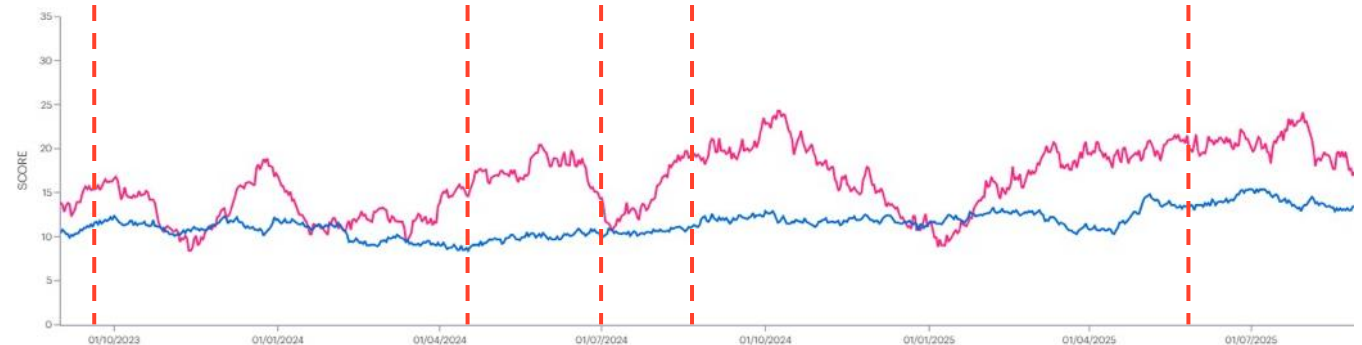
8 Aug 24:
Wonderland
movie
sponsorship

17 Jun 25:
Singlife covers
customers for
Jetstar disruption

**Metric:
Net
Impression**



**Metric:
Considerati
on (%)**



Gen Z Non-Gen Z

Samsung used relatable content and real time connection to engage Gen Z



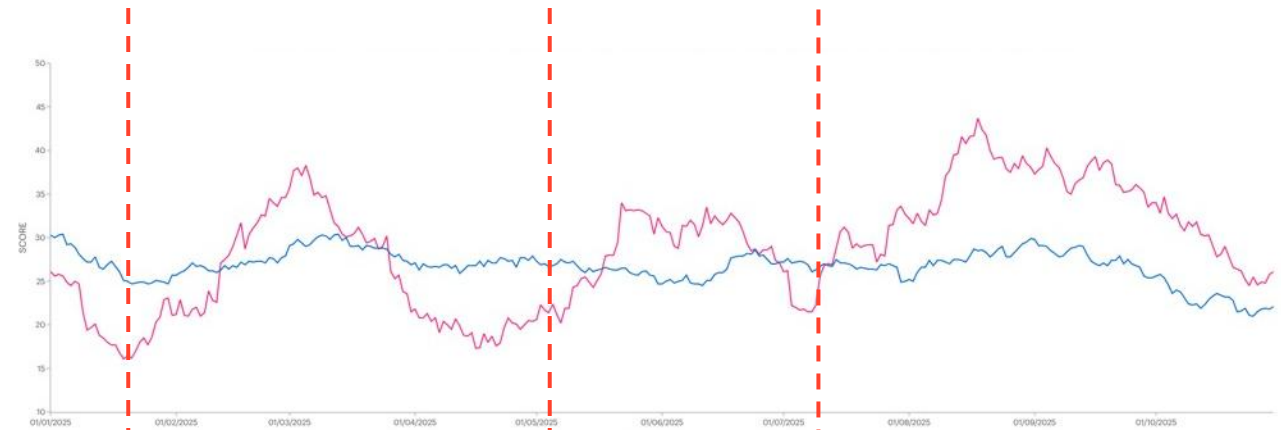
YouGov Singapore BrandIndex, 1 Jan 2025 – 31 Oct 2025 | Moving Average: 6 weeks | Gen Z: 18-28 y.o., Non-Gen Z: 29+ y.o.

22 Jan 25:
Galaxy S25 launch
followed by global
campaign

4 May 25:
Part II of global
Galaxy S25
campaign

9 Jul 25:
Galaxy Z launch
followed by
Galaxy Flexival

Metric:
WOM (%)



Metric:
Consideration (%)



Gen Z

Non-Gen Z

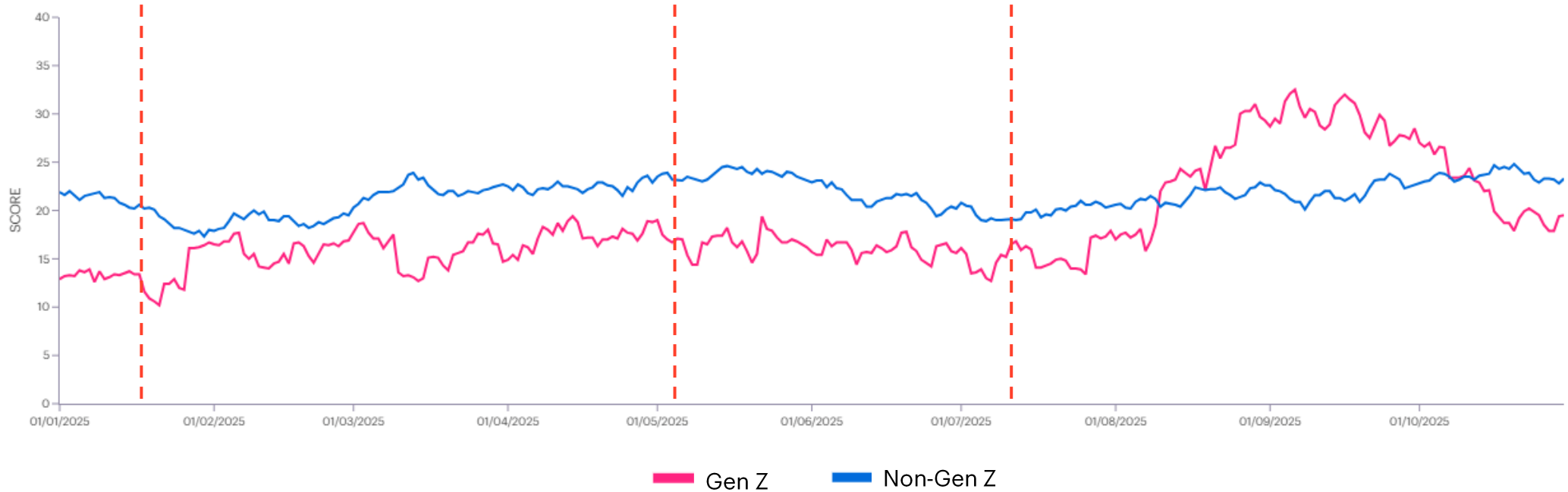
When Samsung went live, Gen Z tuned in and checked out

22 Jan 25:
Galaxy S25 launch followed
by global campaign

4 May 25:
Part II of Galaxy S25
campaign

9 Jul 25:
Galaxy Z launch followed
by Galaxy Flexival

Metric:
Purchase
Intent (%)



Takeaways

1

Glowing Up for Gen Z

Brands can successfully position or reposition themselves to appeal to Gen Z.

This requires strategic shifts in messaging, platforms, and even product offering - without losing sight of core identity.

2

Trends into transactions

Gen Zs are always on the pulse - spotting new brands early and turning trends into transactions.

For them, shopping is social, fast, and fueled by what's trending. To keep up, brands must remain on their radar.

3

Keep it real

While visibility via the right channels matter, trust and authenticity seal the deal.

Staying true to your brand's identity and communicating transparently builds trust with Gen Zs.

4

Turn fun into followers

To truly win Gen Z over, brands must entertain.

Whether through humor, creativity, or immersive experiences, capturing their attention means delivering content that's engaging and shareable.

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Thank you

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