

APAC



The rise of value shoppers:

APAC grocery retail report 2025

/Research Reality



Contents

- 01** Introduction
- 02** Grocery shopping habits & preferences
- 03** Value driven shoppers
- 04** Digital tools & ads impact
- 05** Shopper mindsets



Introduction

From Singapore's sprawling supermarkets to Hong Kong's bustling hypermarkets, one trend is reshaping grocery shopping in Australia, Singapore, Hong Kong, Indonesia, and Thailand: the pursuit of value. As costs rise, lifestyles shift, and digital tools empower smarter choices, consumers in these markets are redefining how they buy essentials, seeking savings without sacrificing quality.

The rise of value first shopping in APAC report explores the habits, preferences, and priorities of value-driven shoppers in the supermarkets and hypermarkets of these five markets. Whether chasing promotions, exploring new brands, or switching retailers for better deals, these shoppers are strategic and influential.

Inside this report:

Grocery habits & preferences

Where, how often, and why consumers shop for groceries.

Value-conscious shoppers

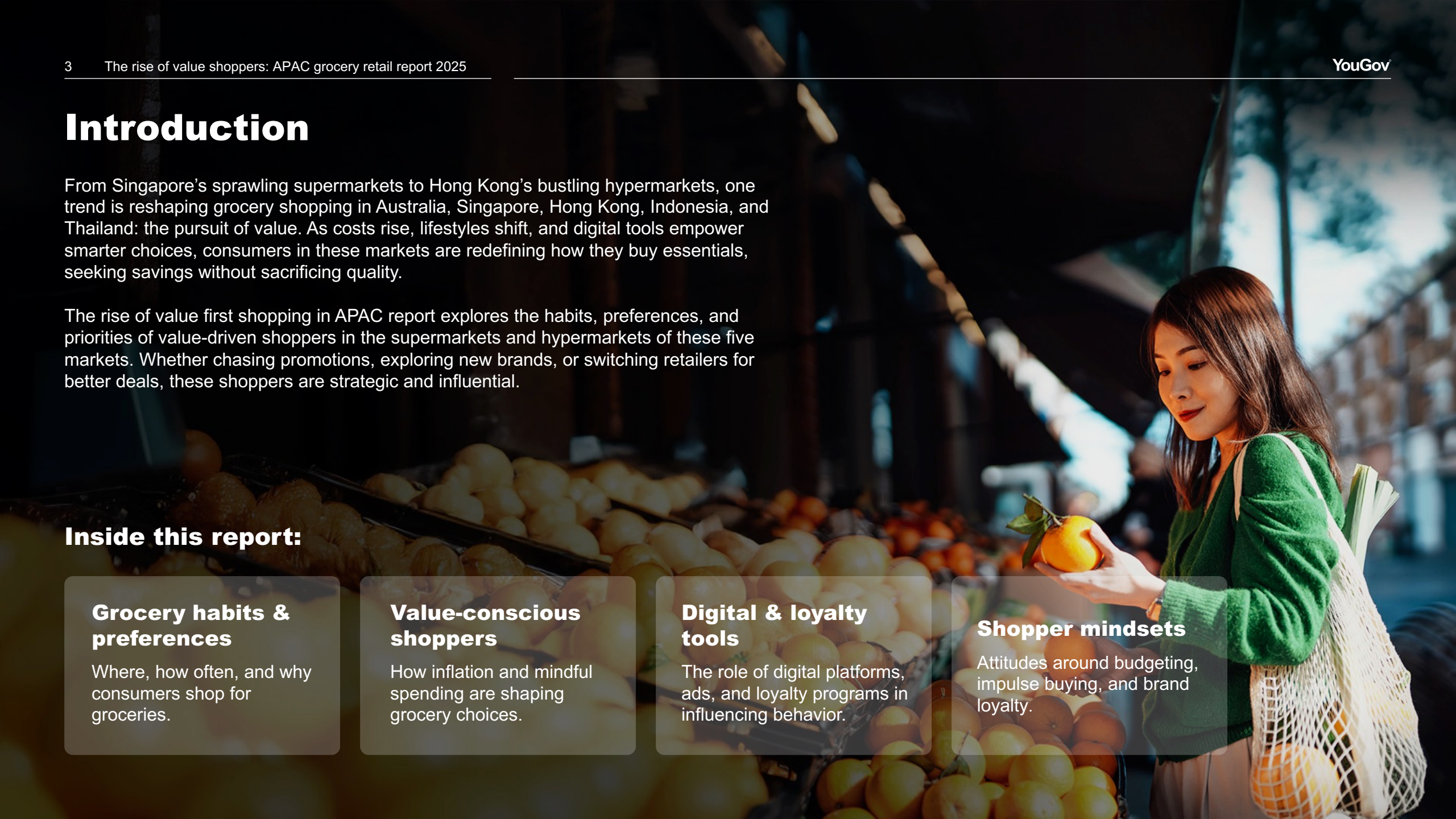
How inflation and mindful spending are shaping grocery choices.

Digital & loyalty tools

The role of digital platforms, ads, and loyalty programs in influencing behavior.

Shopper mindsets

Attitudes around budgeting, impulse buying, and brand loyalty.



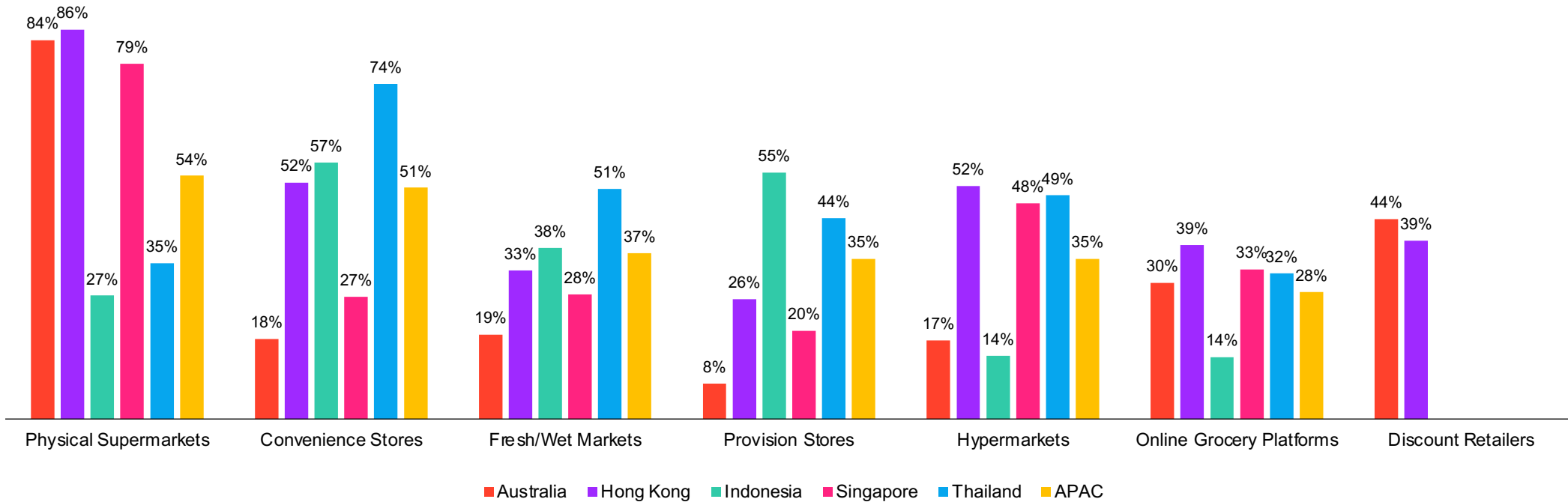
Grocery shopping habits & preferences



Physical supermarkets are the top visited overall.

Physical supermarkets are the most popular overall (54%), but in markets like Indonesia and Thailand, consumers rely more on a mix of convenience stores, wet markets, and provision shops.

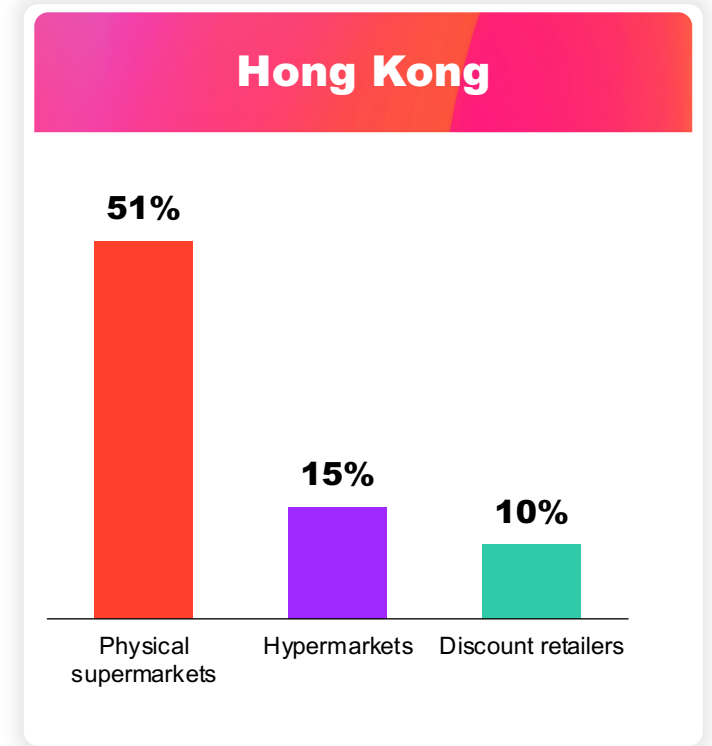
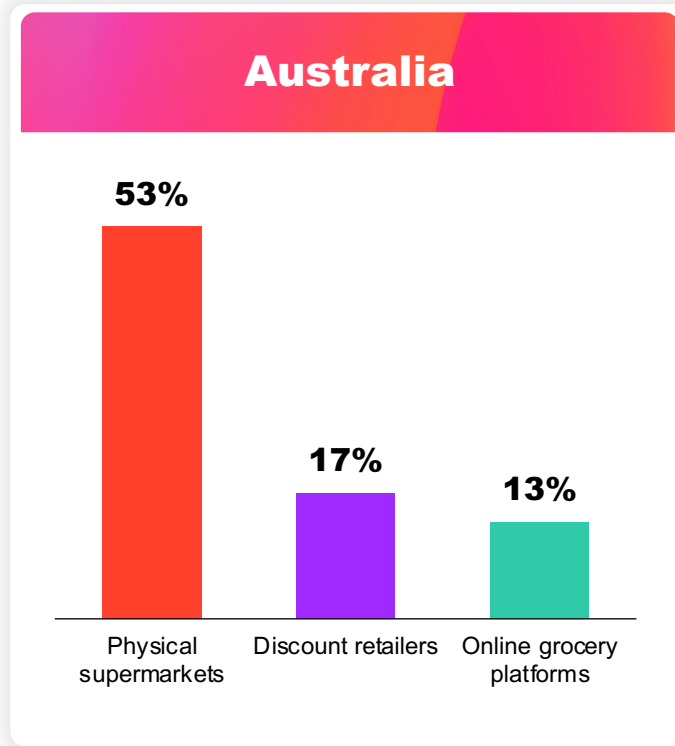
Places visited for groceries in the past 3 months



Q: Which of the following places have you shopped for groceries for the past 3 months?
 In this report, Hypermarkets in Hong Kong include AEON and YATA, as these are classified as GMS (General Merchandise Stores).

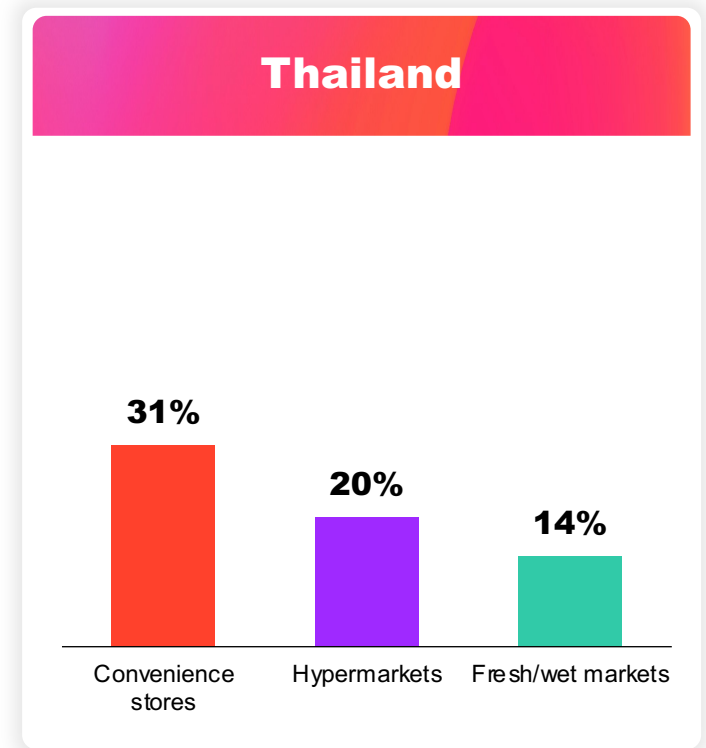
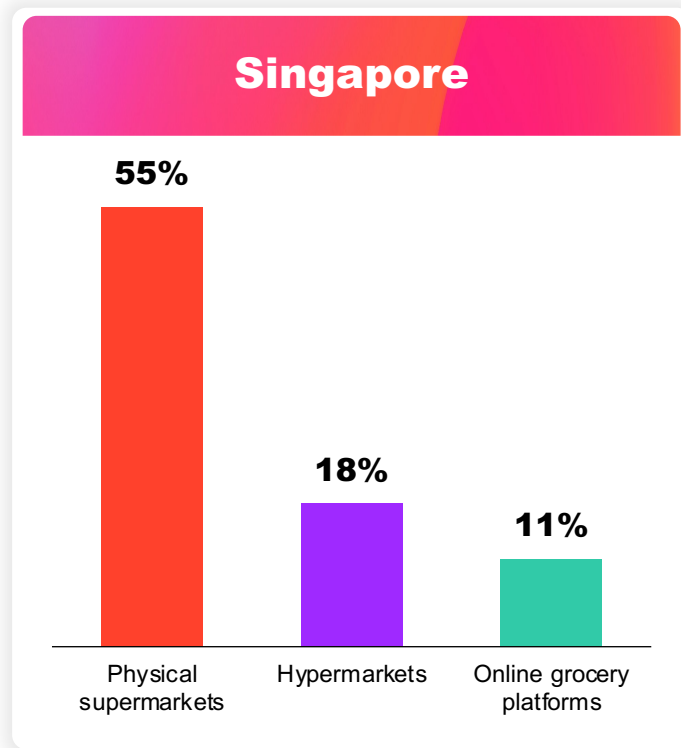
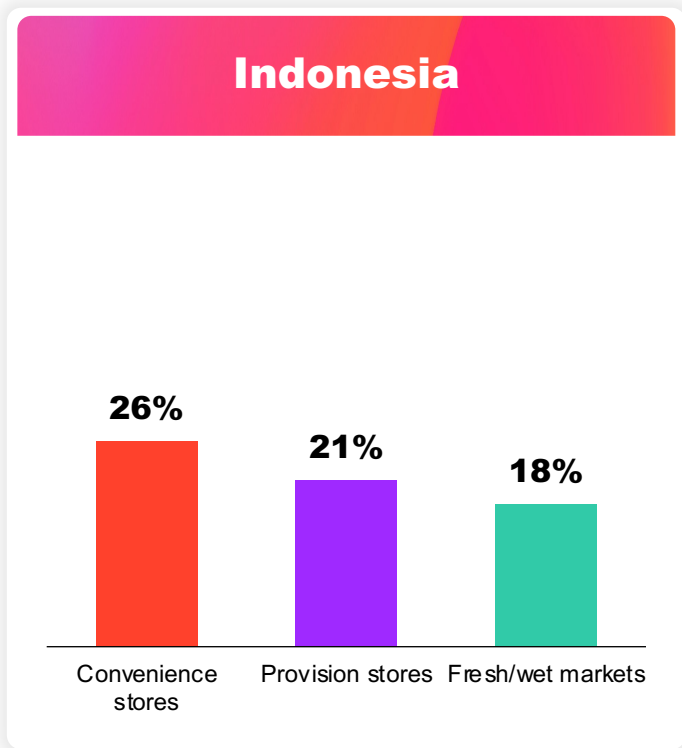
Most preferred grocery store

Across APAC, grocery preferences differ - physical supermarkets are the top choice in Singapore (55%), Hong Kong (51%) and Australia (53%), while convenience stores lead in Indonesia (26%) and Thailand (31%).



Q: Where do you most prefer to shop for groceries? (Select 1)

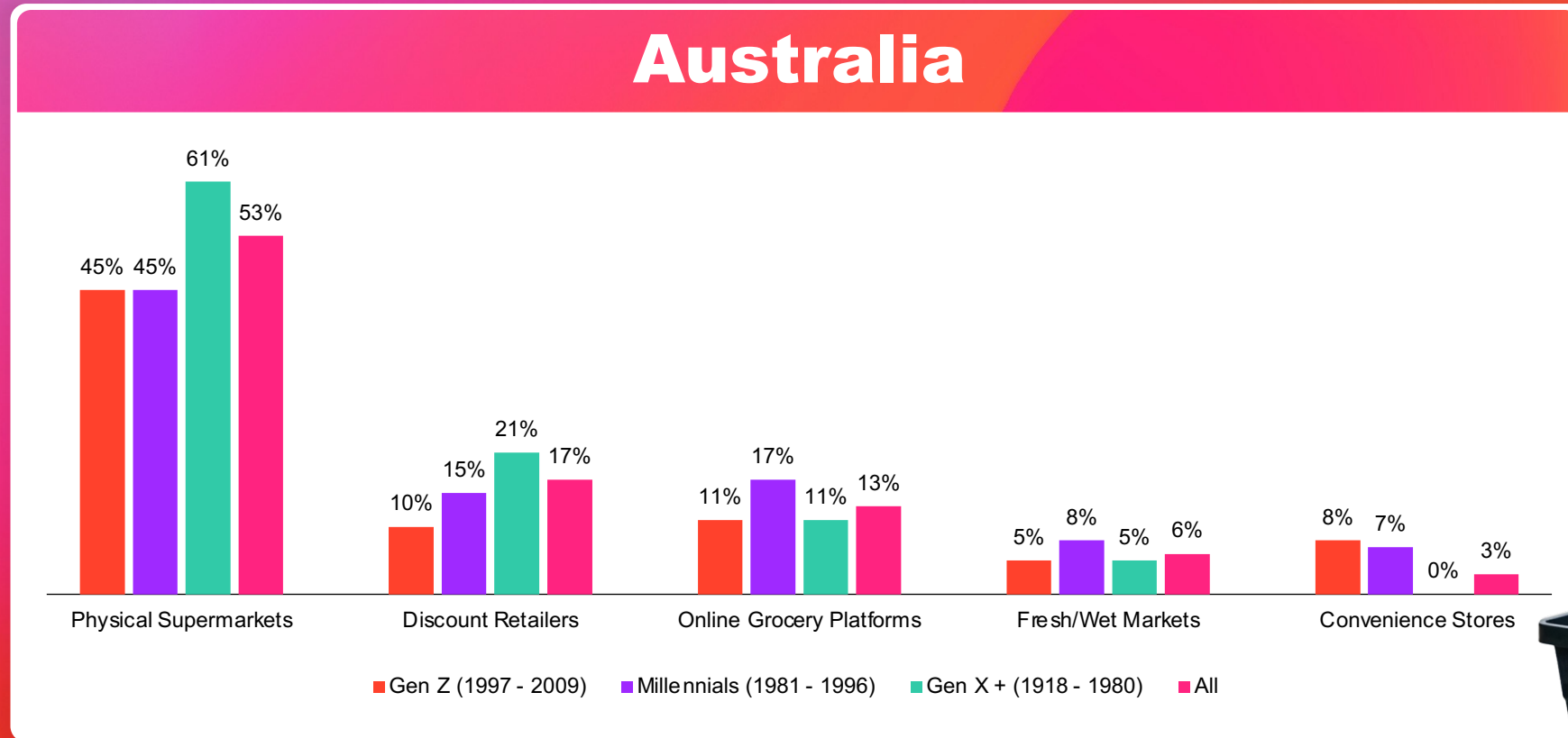
Most preferred grocery store (contd.)



Q: Where do you most prefer to shop for groceries? (Select 1)

Where do different generations shop for groceries?

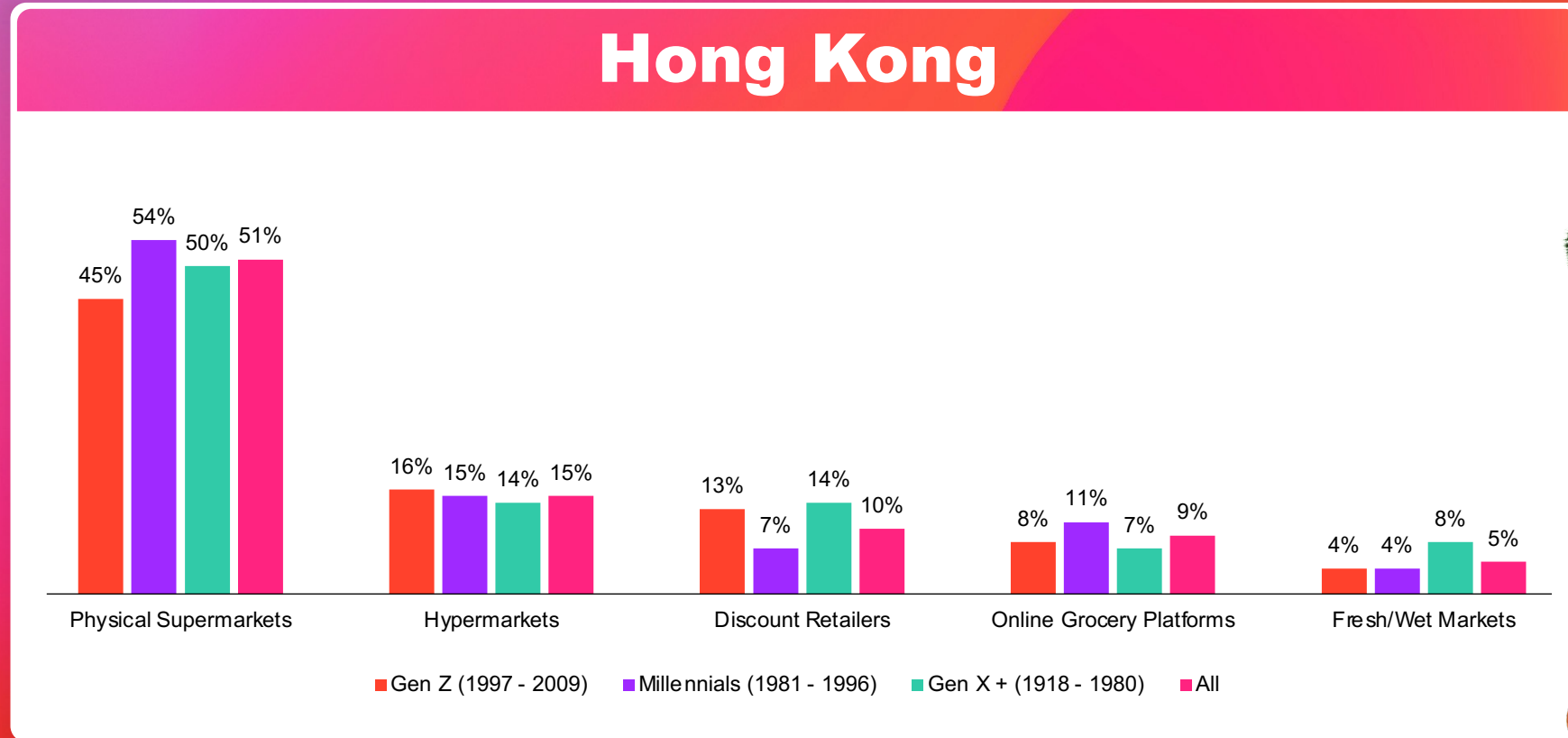
In Australia, physical supermarkets remain the dominant grocery shopping channel across all generations, with 61% of Gen X+ favouring them the most. This group also shows a notable interest in discount retailers. In addition, Millennials also show preference to shop through online grocery platforms (17%).



Q: Where do you most prefer to shop for groceries? (Select 1)

Where do different generations shop for groceries? (contd.)

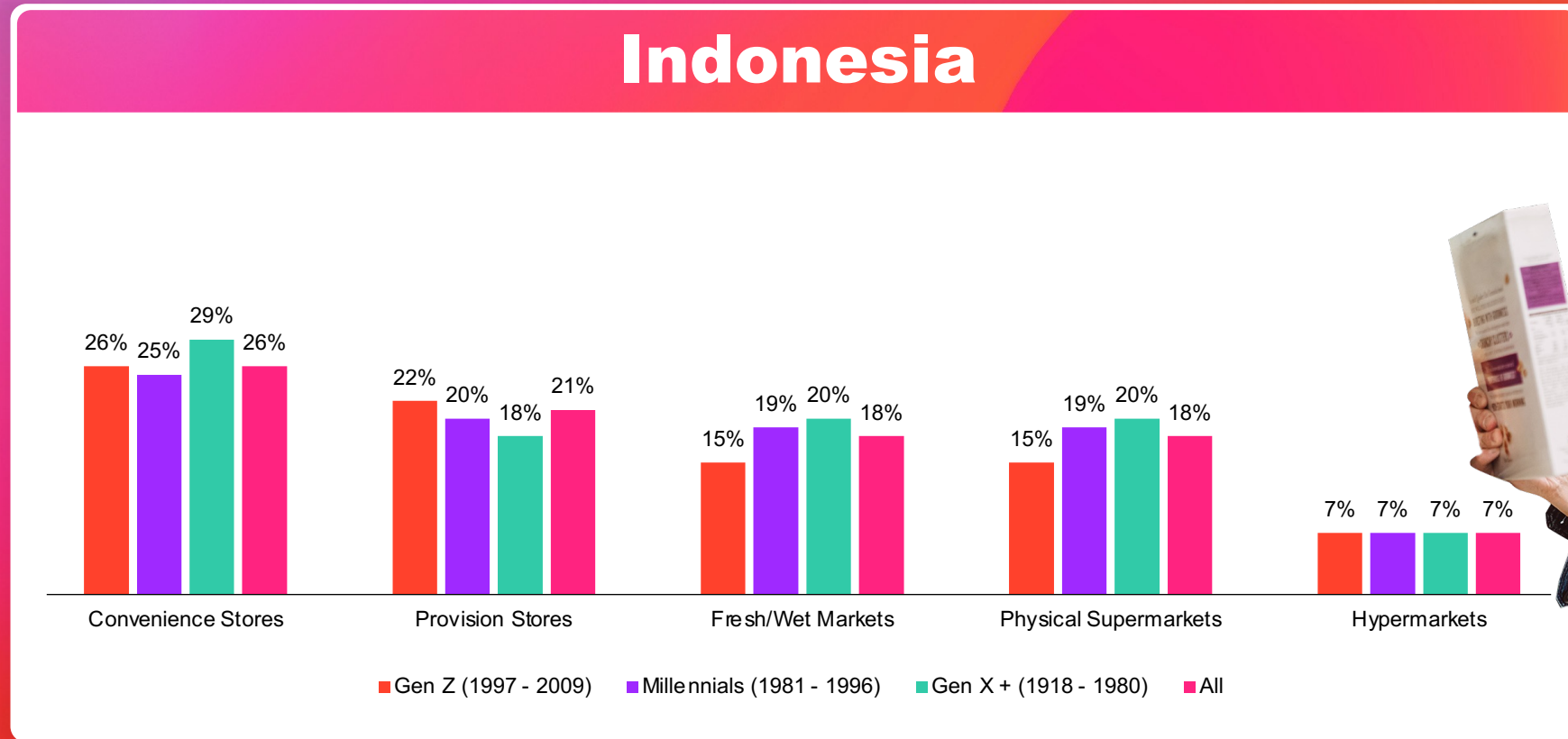
In Hong Kong, physical supermarkets are similarly the top choice, especially among Millennials, with 54% identifying them as their preferred channel.



Q: Where do you most prefer to shop for groceries? (Select 1)

Where do different generations shop for groceries? (contd.)

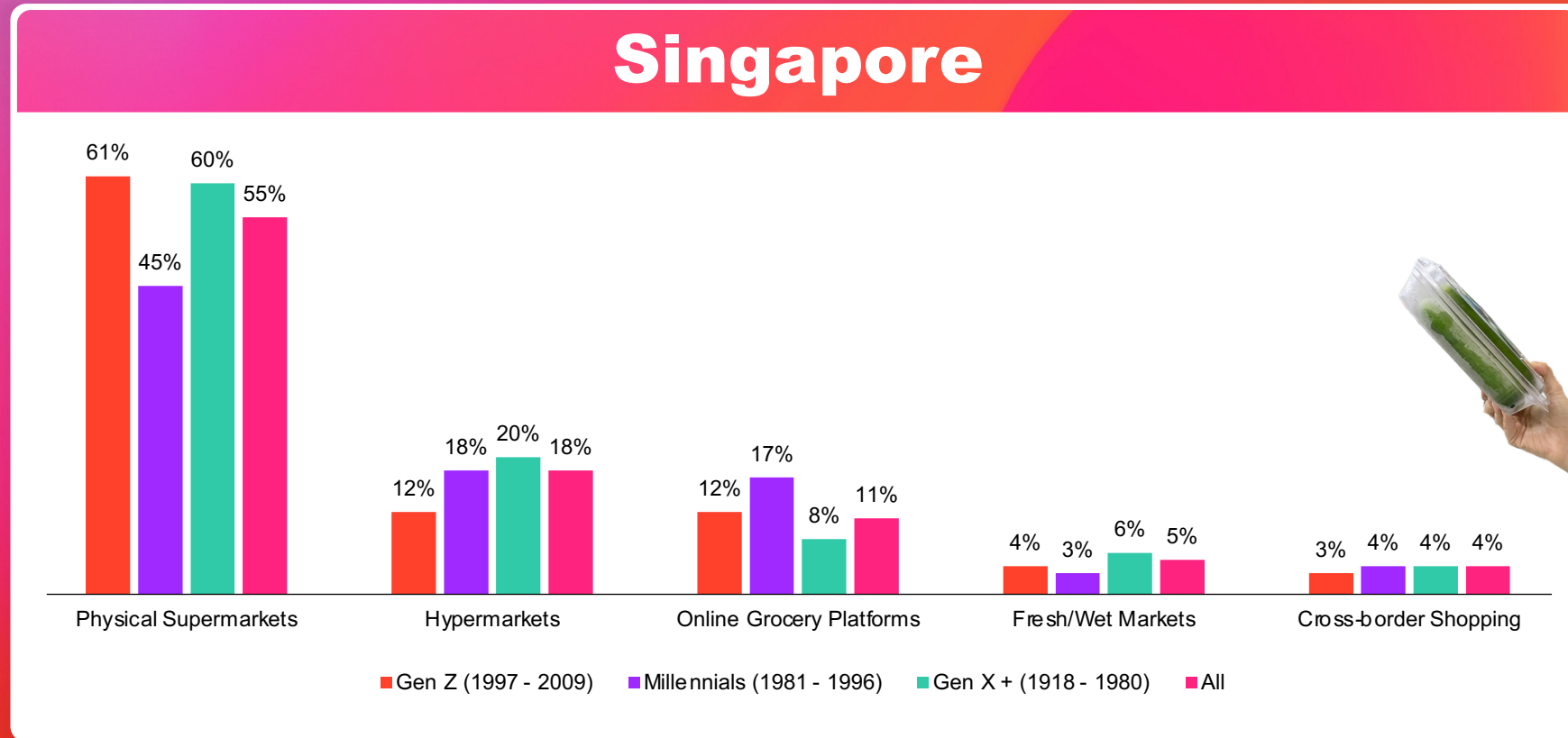
In Indonesia, convenience stores are the most preferred grocery shopping channel across generations, particularly among Gen X+ (29%). Younger groups like Gen Z and Millennials also show a strong presence in provision stores.



Q: Where do you most prefer to shop for groceries? (Select 1)

Where do different generations shop for groceries? (contd.)

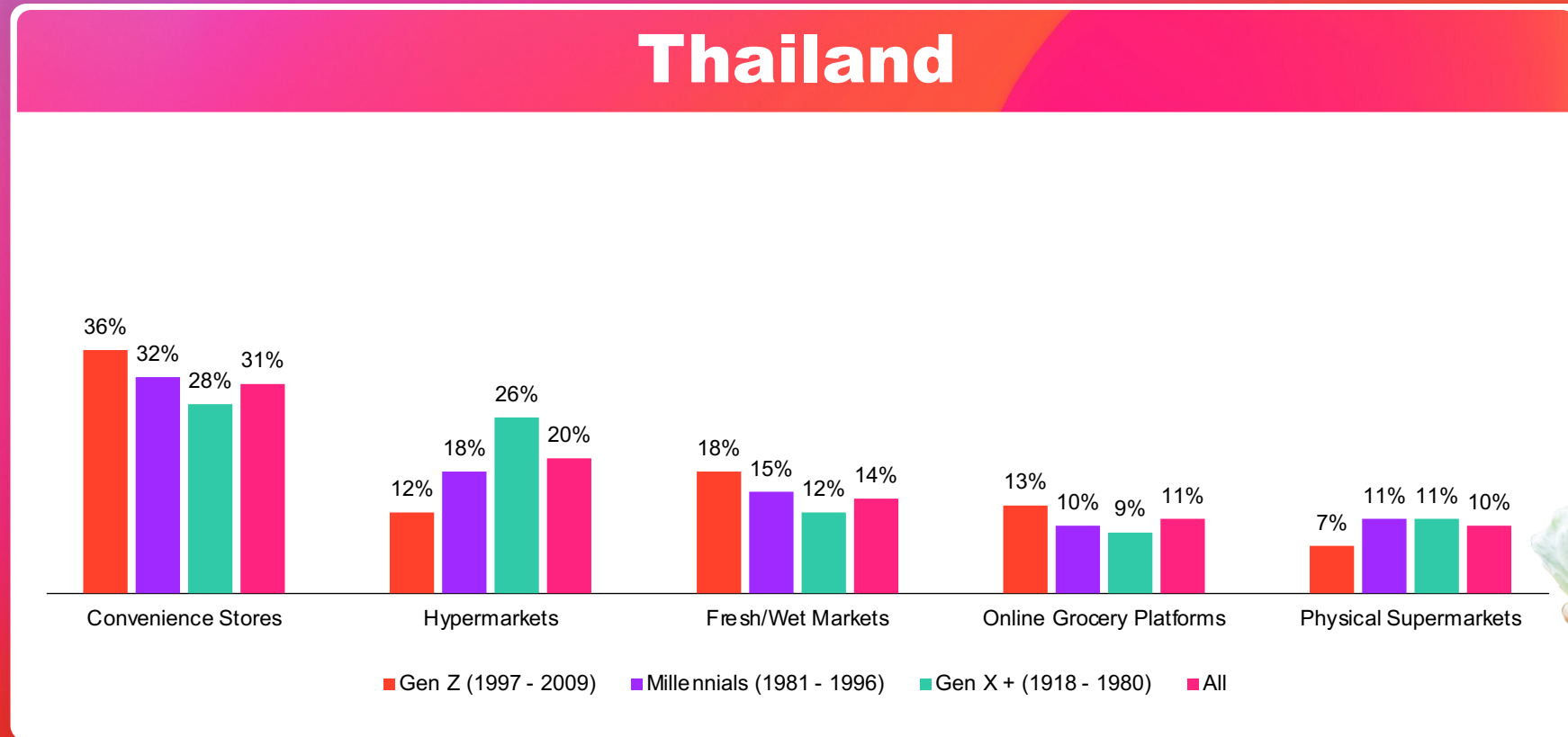
In Singapore, physical supermarkets are the top choice for both Gen Z (61%) and Gen X+ (60%). However, preferences start to diverge across generations—Gen X+ show a stronger inclination toward hypermarkets, while Millennials are more likely to shop through online platforms, suggesting a growing digital adoption among this group.



Q: Where do you most prefer to shop for groceries? (Select 1)

Where do different generations shop for groceries? (contd.)

In Thailand, convenience stores are the preferred grocery shopping location, especially among Gen Z at 36%. Hypermarkets are more popular with Gen X+, while fresh/wet markets are favored by Gen Z.

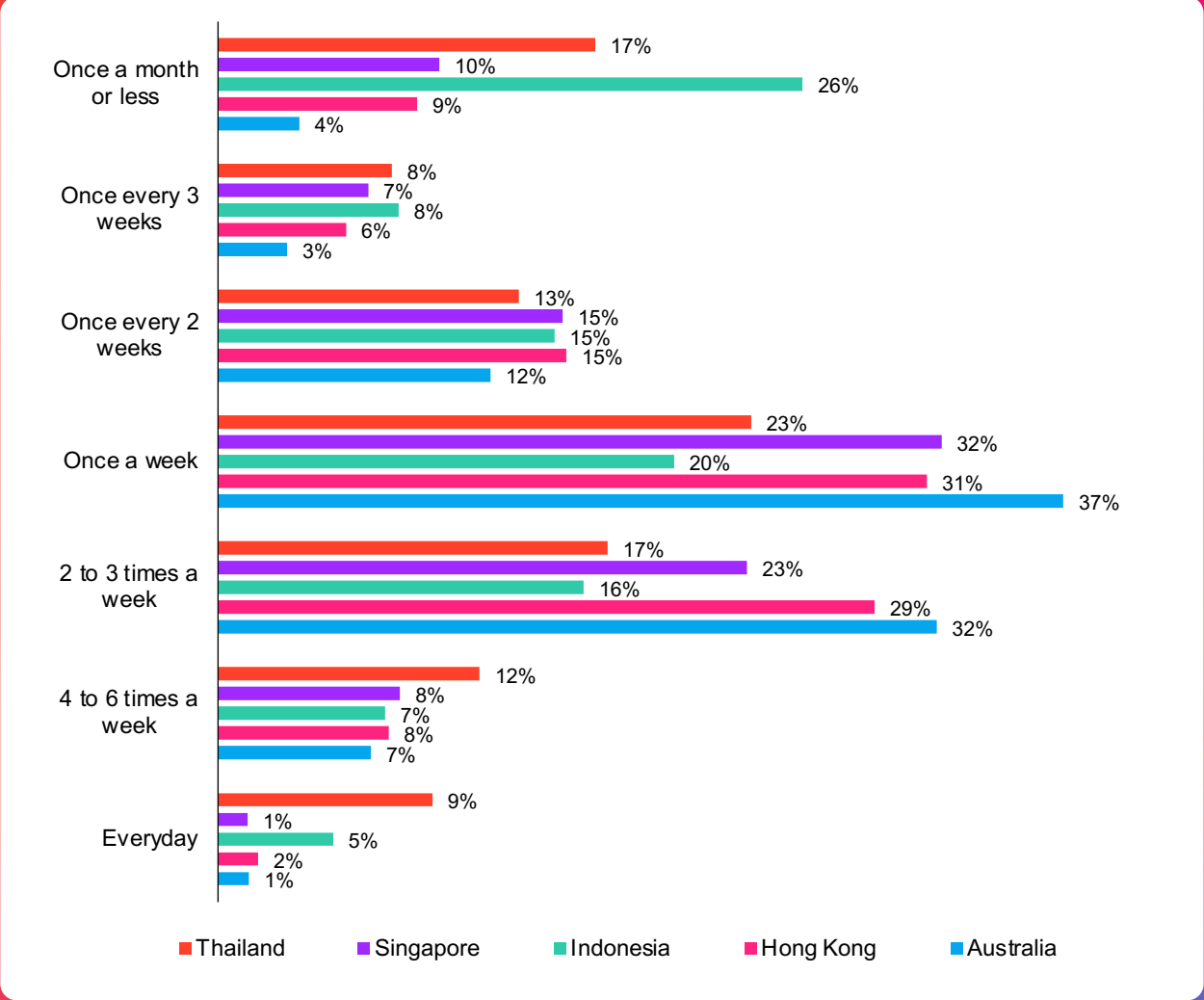


Q: Where do you most prefer to shop for groceries? (Select 1)

Australians visit supermarkets the most, at least once a week, compared to other markets.



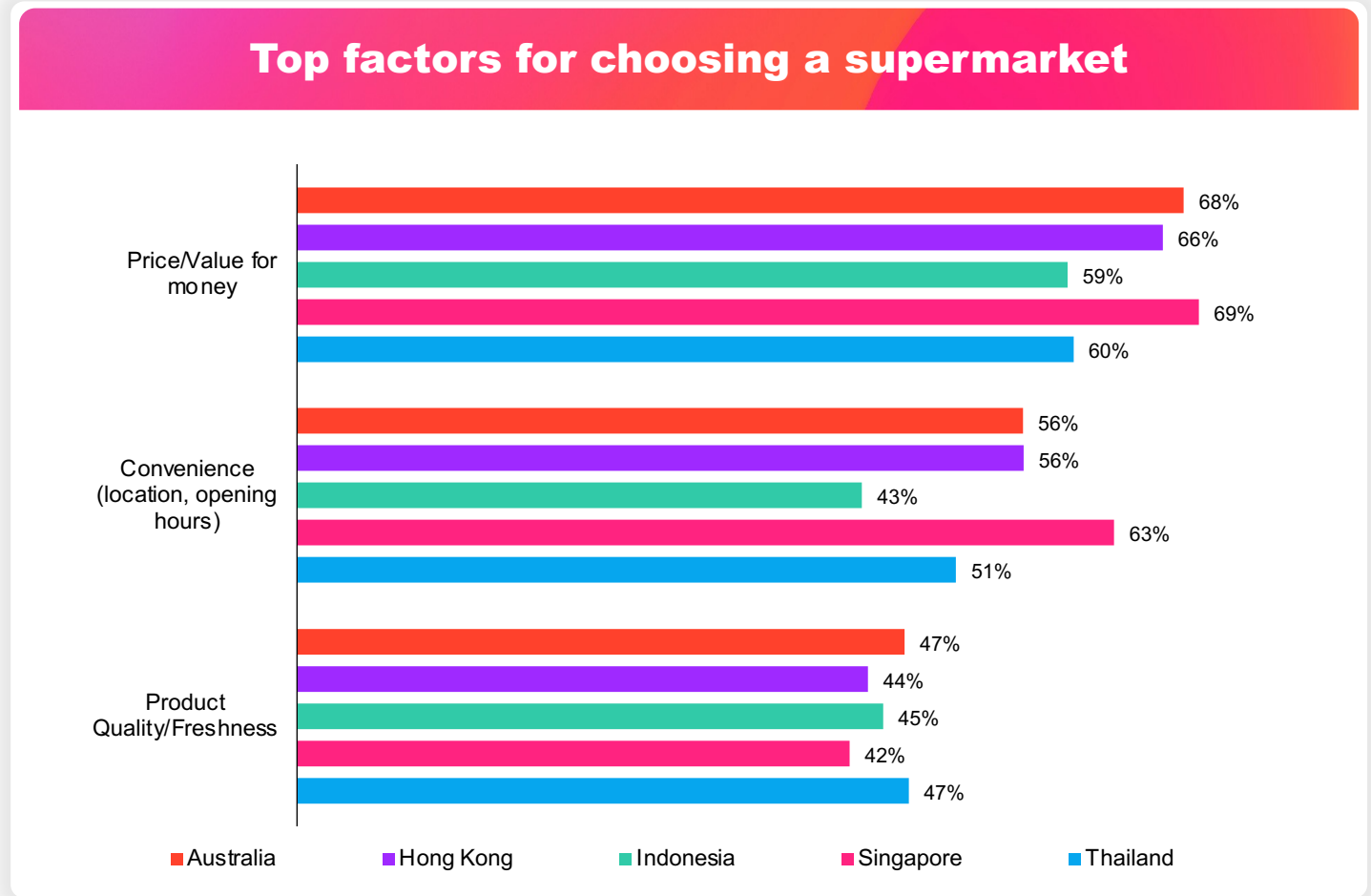
Get in touch



Q: In the last month how frequently have you shopped, either online or in-store supermarkets/hypermarkets for grocery items?
Base: Respondents who shop at supermarkets, online grocery platforms and hypermarkets

Across APAC, price is king.

Across APAC markets, shoppers consistently cite Price/Value for money, Convenience (location, opening hours), and Product Quality/Freshness as their top three considerations when choosing a supermarket. However, Indonesia stands out as the exception, while price remains the most important, Product Variety/Assortment takes second place, pushing convenience out of the top three.



Q. What are the most important factors influencing your choice of supermarket?

Supermarket choice factors: market-specific highlights

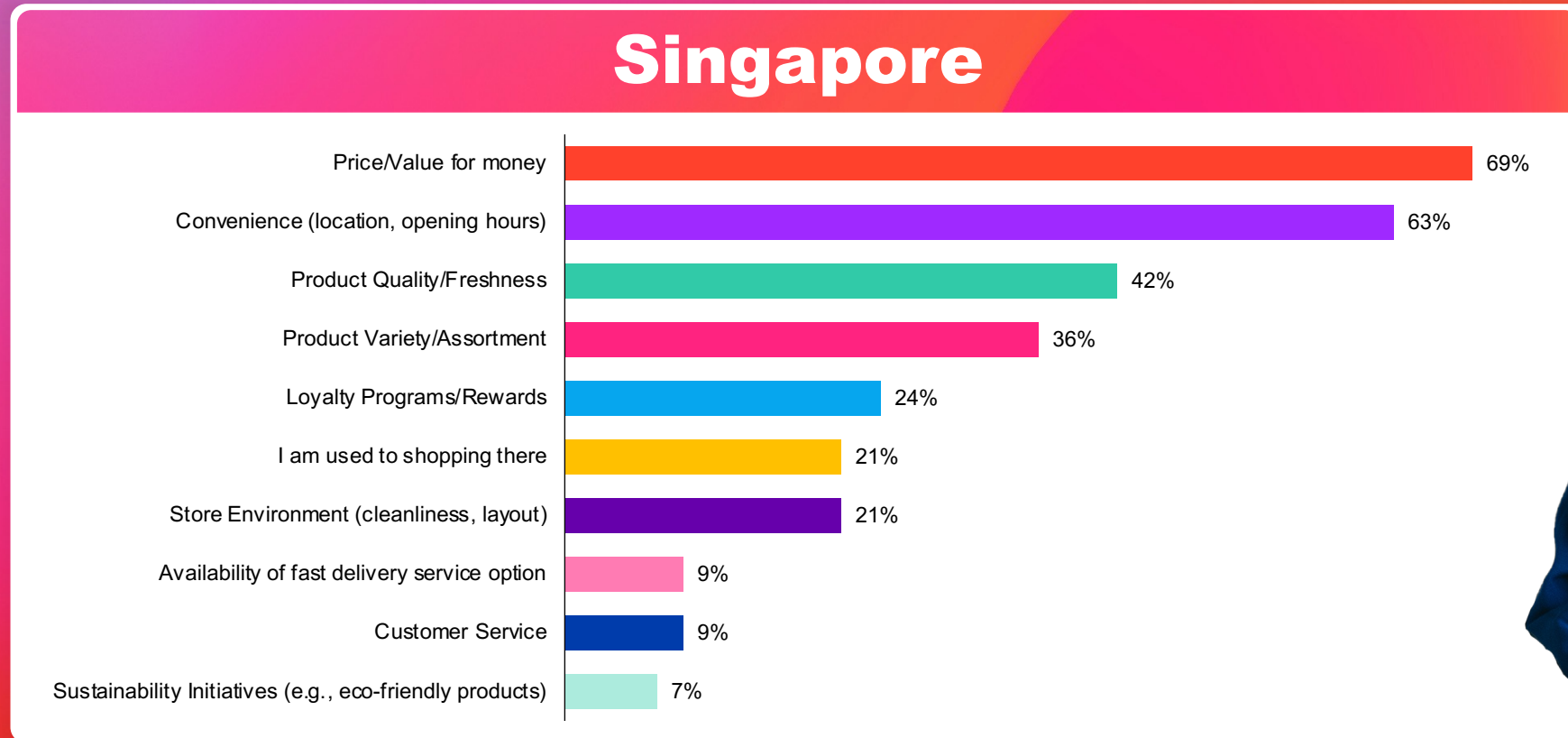
In Indonesia, store environment (32%) is a clear outlier — the highest across all markets, indicating strong sensitivity to cleanliness and layout, as well as having product variety and assortment(46%).



Q: What are the most important factors influencing your choice of supermarket? Please rank your top 3 factors with number 1 being your most important factor.

Supermarket choice factors: market-specific highlights (contd.)

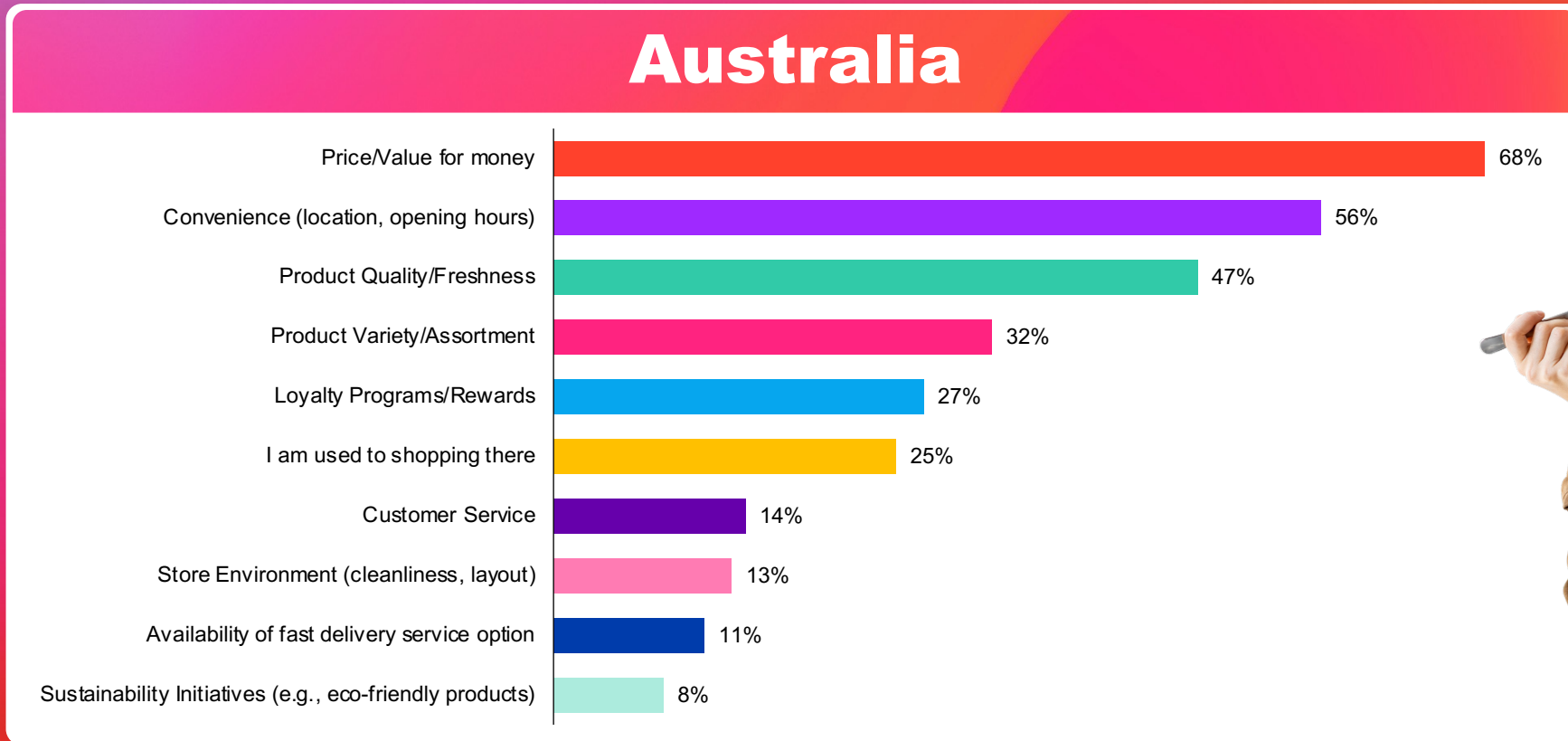
In Singapore, price is the standout factor with almost 7 in 10 agree it is one of the most important factors.



Q: What are the most important factors influencing your choice of supermarket? Please rank your top 3 factors with number 1 being your most important factor.

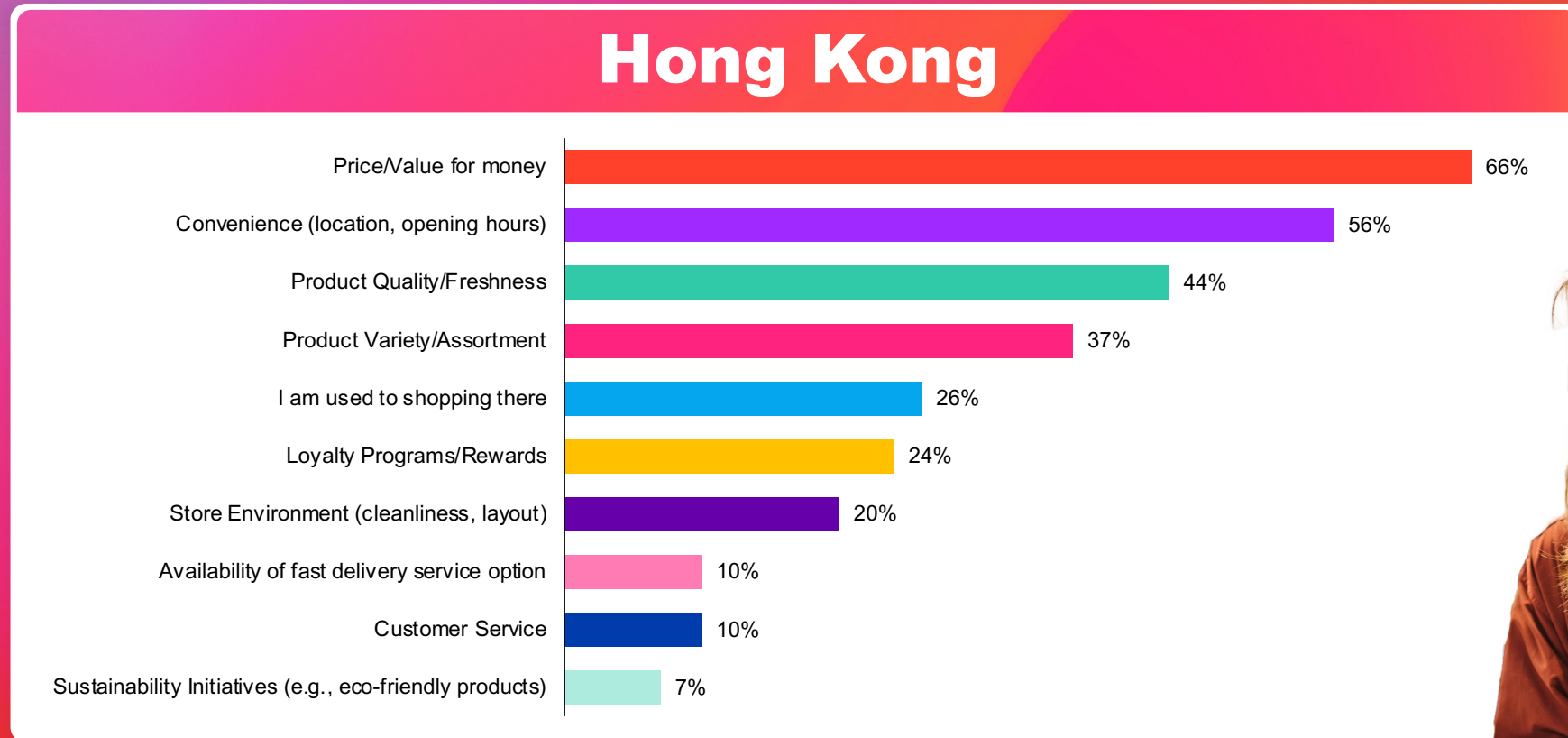
Supermarket choice factors: market-specific highlights

Loyalty programs and rewards stand out as more important in Australia and Hong Kong than in most other markets (27% and 24% respectively), highlighting the appeal of reward-driven shopping.



Q: What are the most important factors influencing your choice of supermarket? Please rank your top 3 factors with number 1 being your most important factor.

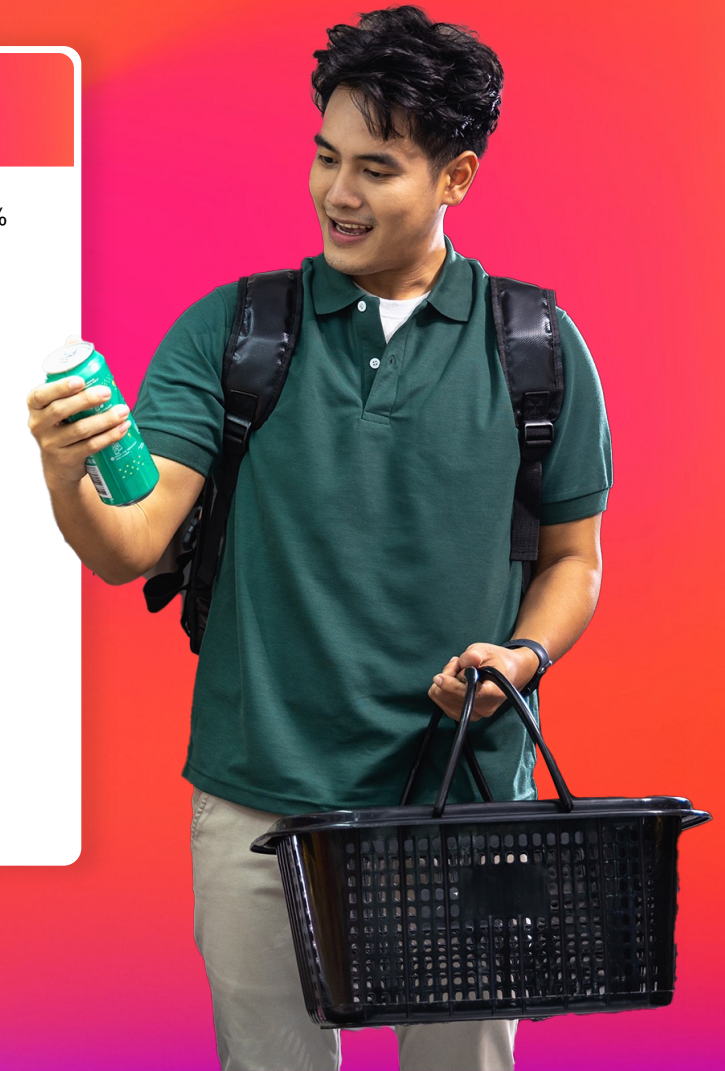
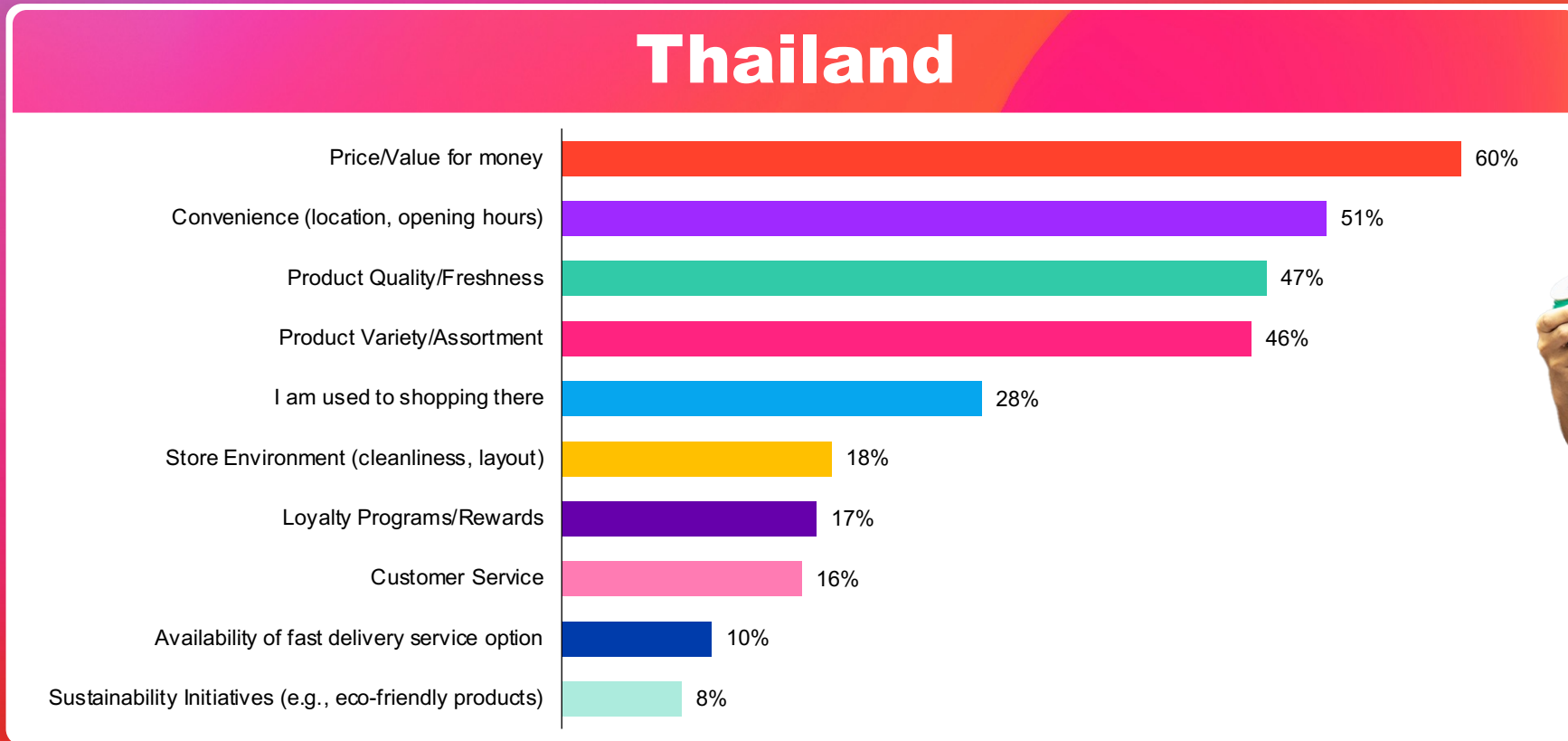
Supermarket choice factors: market-specific highlights (contd.)



Q: What are the most important factors influencing your choice of supermarket? Please rank your top 3 factors with number 1 being your most important factor.

Supermarket choice factors: market-specific highlights

In Thailand, product variety (46%) is the highest among all markets, reinforcing its role as a key differentiator. Customer Service (16%) also ranks slightly higher than average.



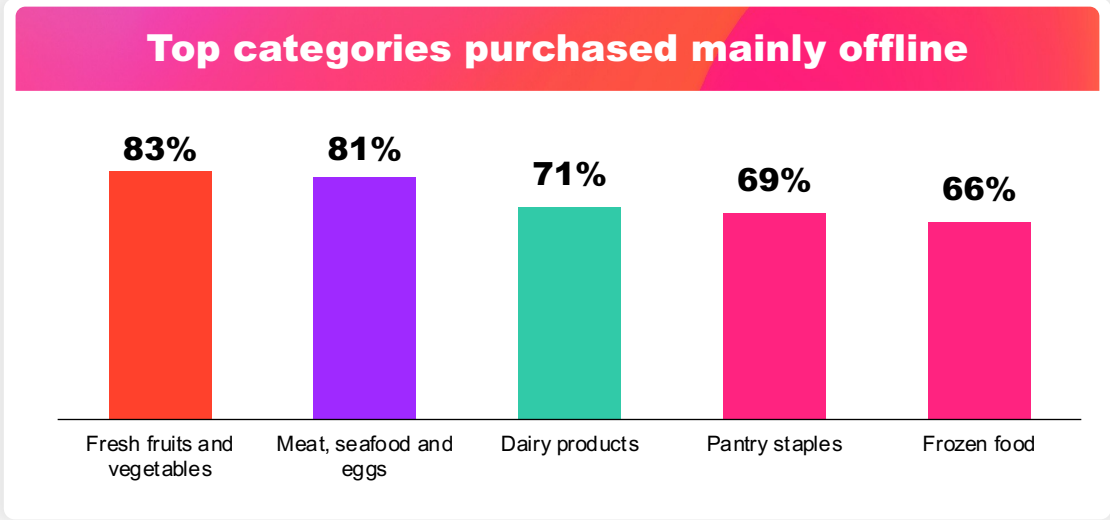
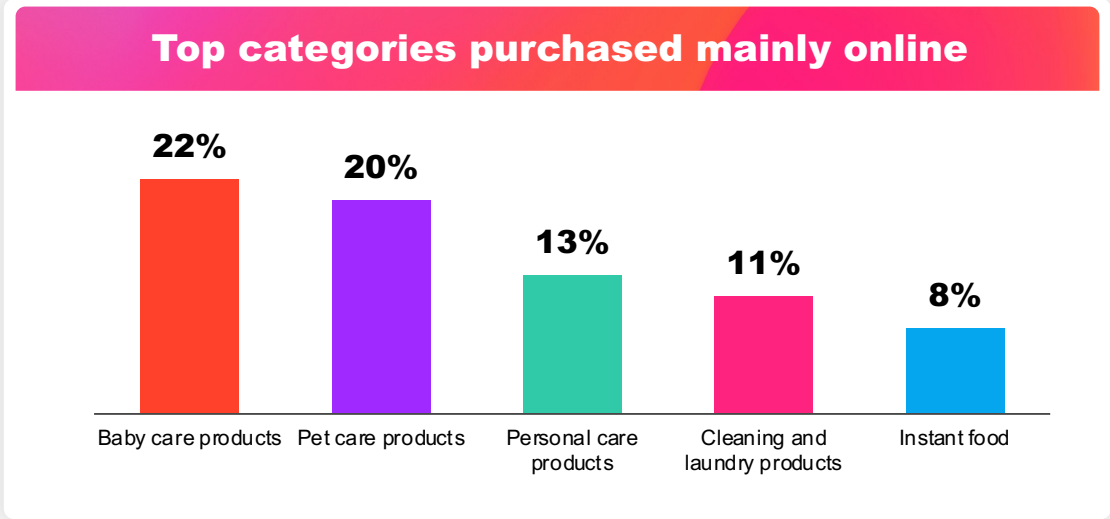
Q: What are the most important factors influencing your choice of supermarket? Please rank your top 3 factors with number 1 being your most important factor.

Baby and pet care products are more likely to be purchased online.

Baby care products (22%) and pet care products (20%) are the top categories purchased mainly online. In contrast, fresh groceries remain mainly purchased offline, with fresh fruits and vegetables (83%), meat, seafood, and eggs (81%), and dairy products (71%) leading the way.



Get in touch



Q: How do you prefer to buy each of the following items?

Zooming in on the value driven grocery shopper



The value-driven shopper

74%

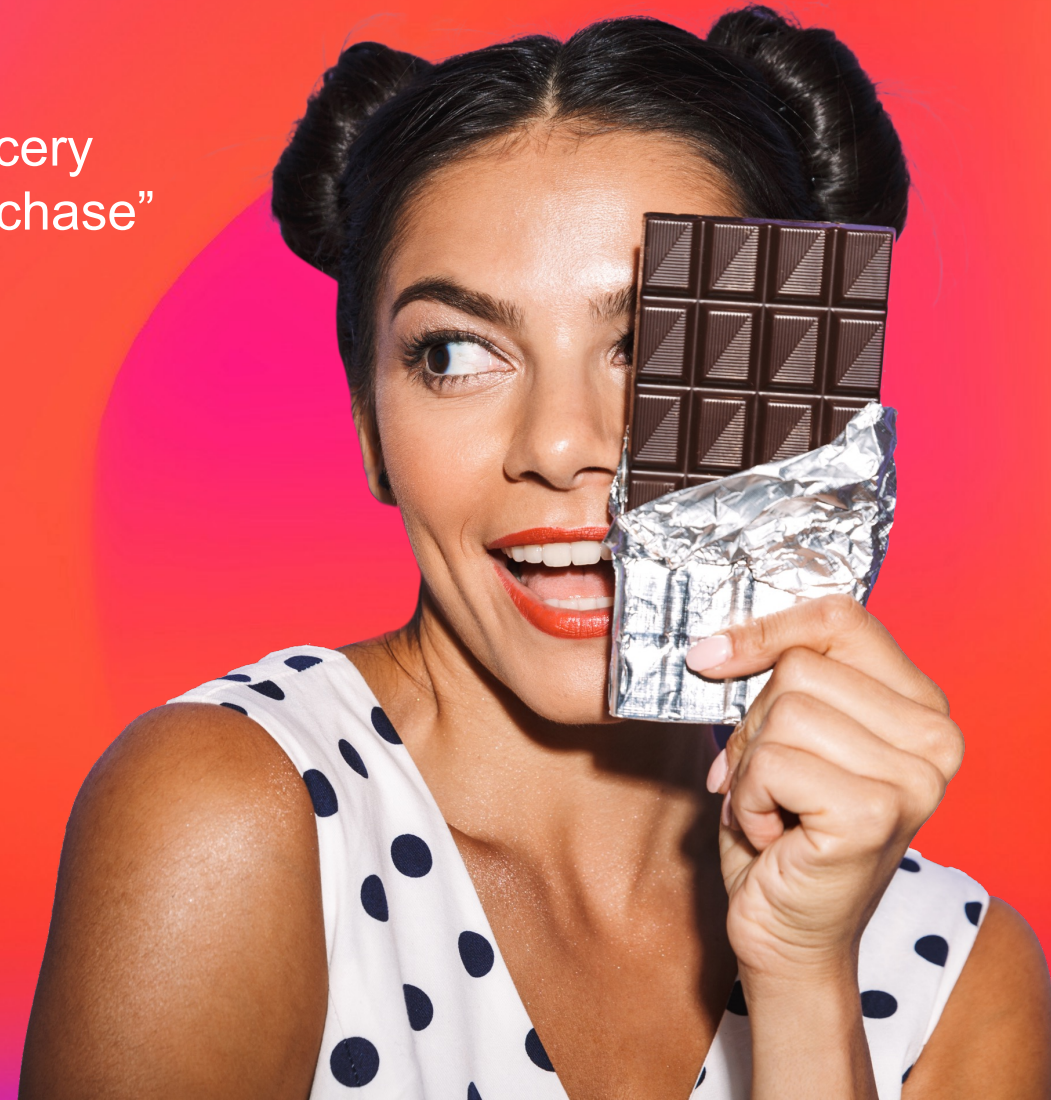


say that “I am open to consider other supermarkets or grocery retailers if I find a lower price of the item I’m looking to purchase”

70%



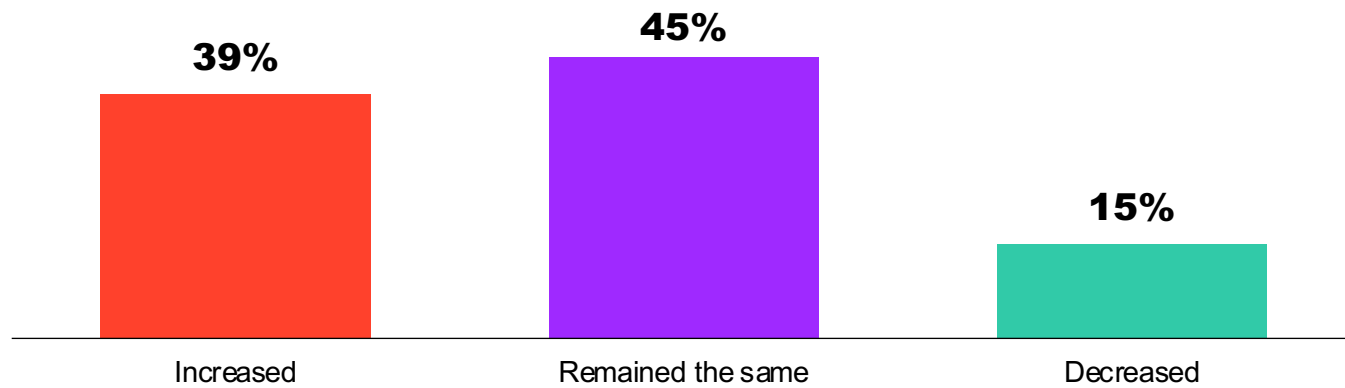
say that “I will look for the lowest price among the same category of item before making a decision to purchase”



Get in touch

Almost 4 in 10 APAC grocery shoppers say that their grocery spending has increased

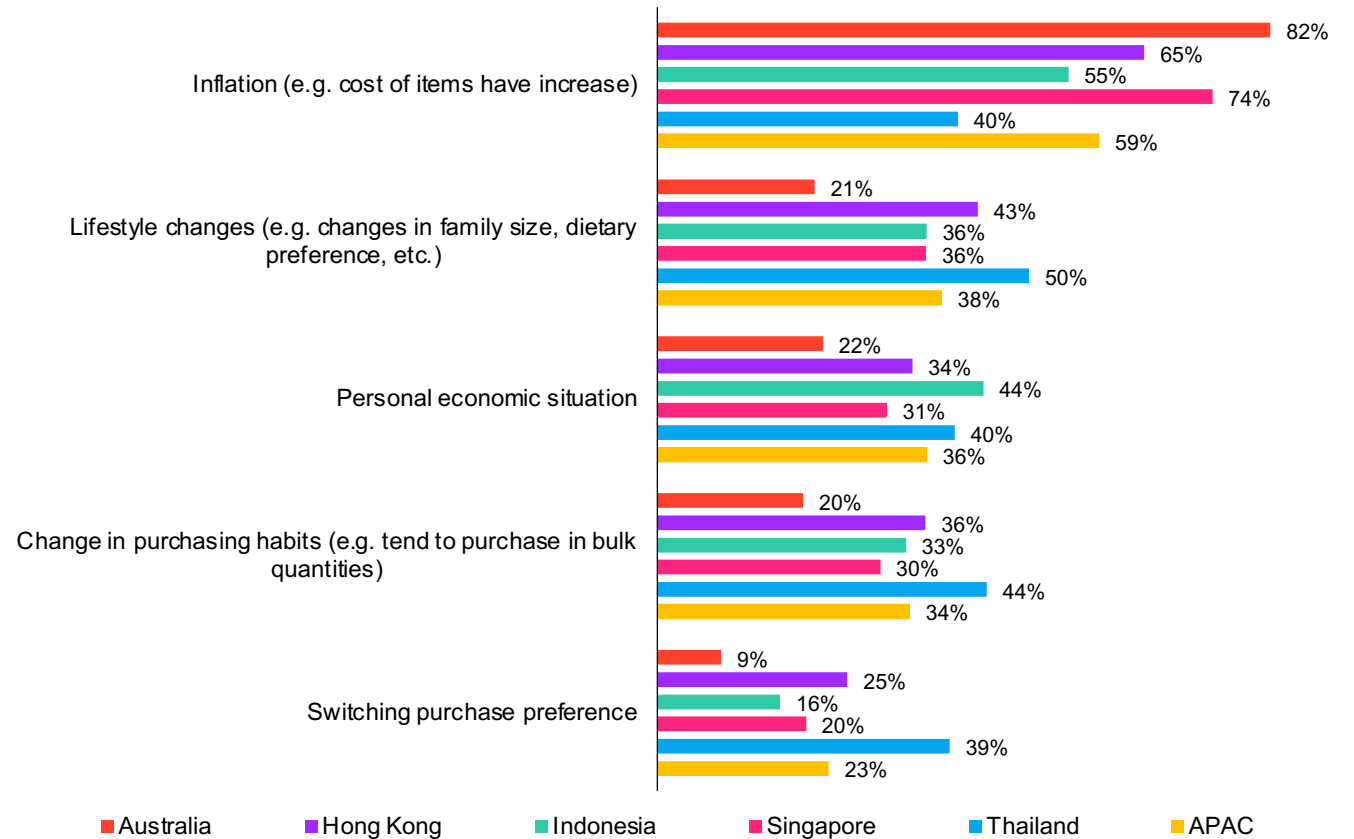
Changes in grocery spending in the past 6 months



Inflation and lifestyle changes drive increased grocery spending across APAC



Factors influencing higher grocery spending



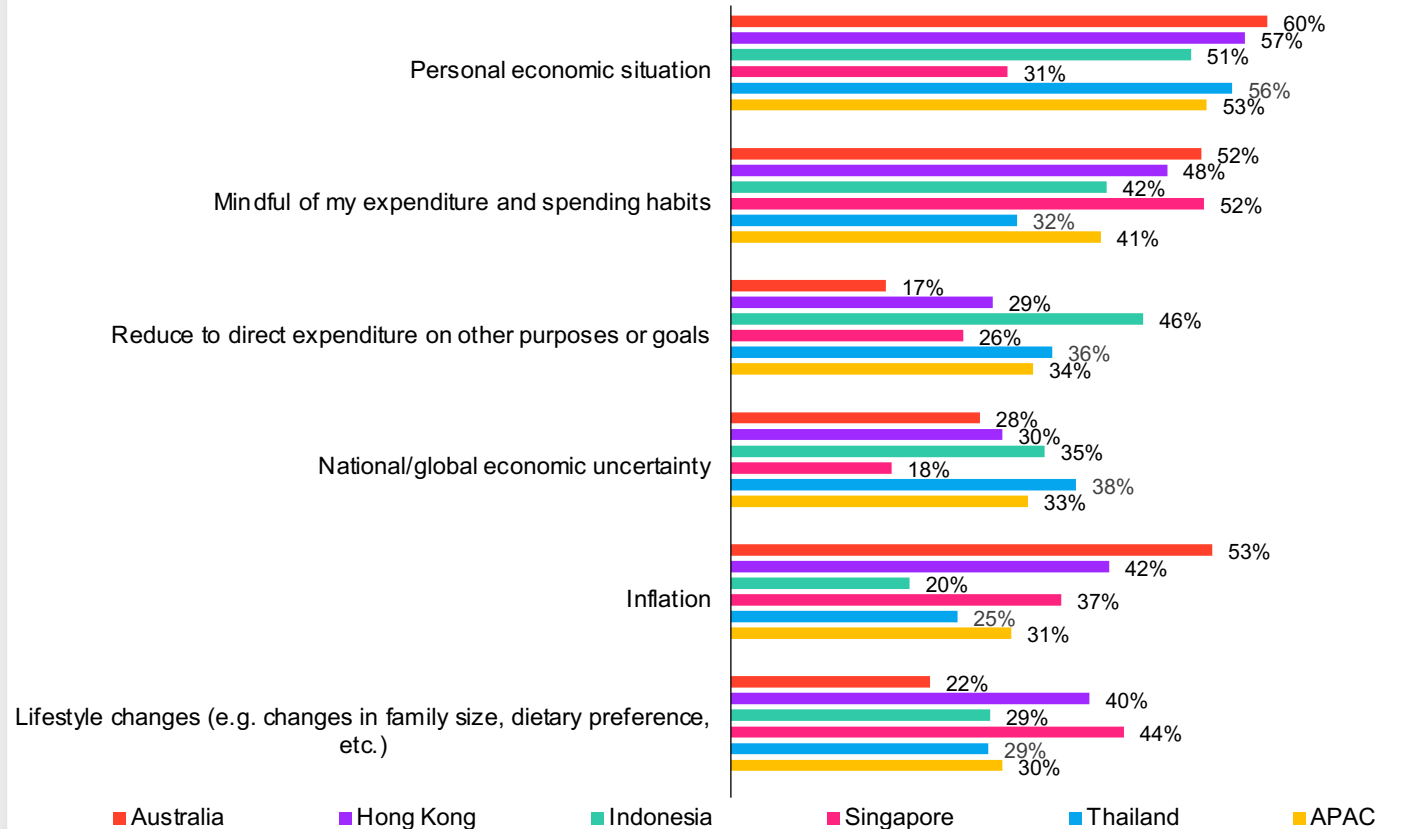
Q: You previously mentioned that your grocery spending has increased, which of the following factors influenced your decision to increase your grocery spending?

Base: those who said grocery spending has increased

Personal finances and spending habits lead consumers to decrease grocery spending



Factors influencing reduced grocery spending



Q: You previously mentioned that your grocery spending has decreased, which of the following factors influenced your decision to cut back on grocery spending?

Base: those who said grocery spending has decreased

Top 5 strategies to reduce grocery spending



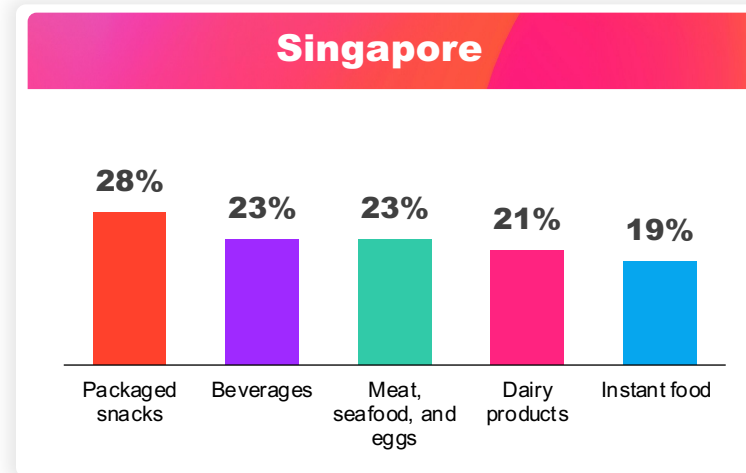
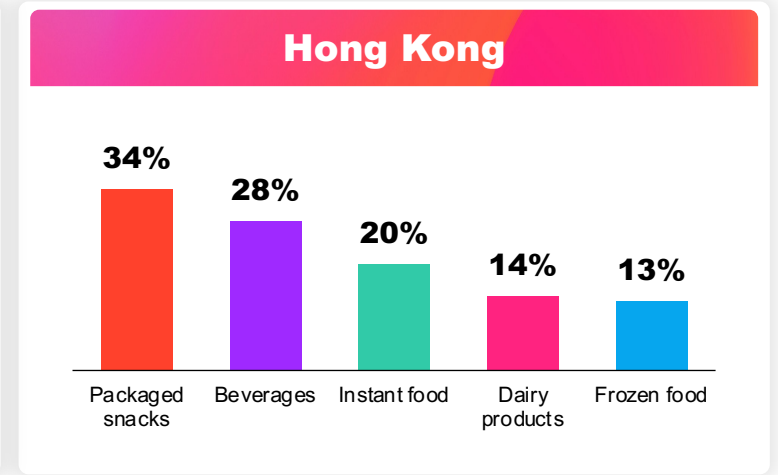
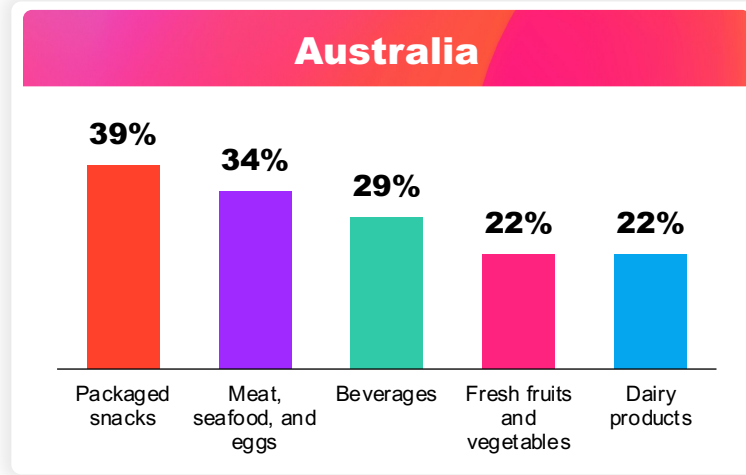
Q: Which of the following strategies have you done to reduce your grocery spending?

Packaged snacks, beverages and meat most vulnerable to grocery price hikes.

Australia (22%), Hong Kong (29%), and Singapore (26%) have a significantly higher proportion of consumers who are unlikely to cut back on any items compared to Indonesia (11%) and Thailand (12%).



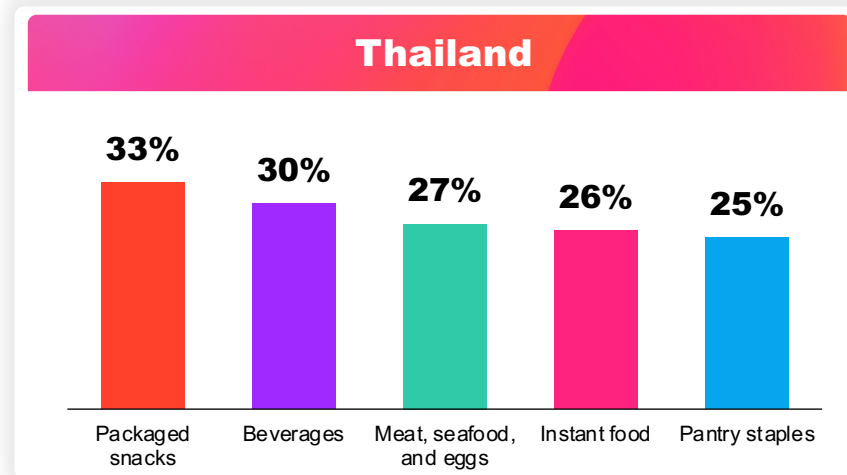
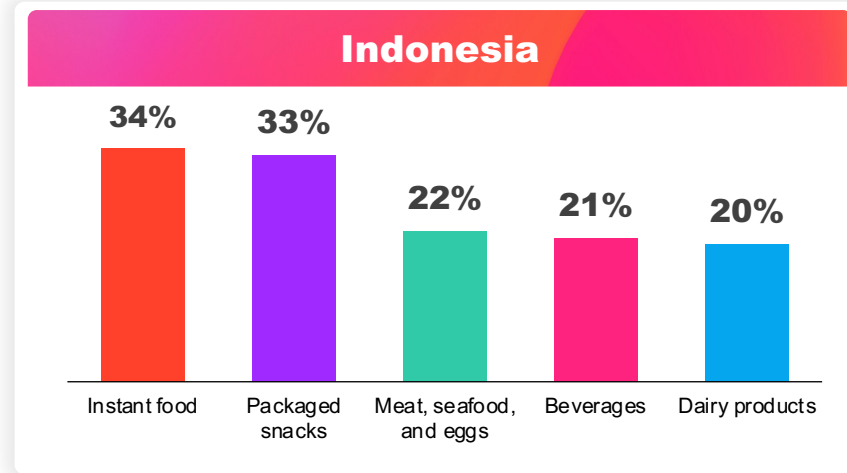
What do shoppers cut first when prices rise?



Q: Imagine the grocery item(s) you purchase regularly have observed an increase in price over time. Which of the following items will you likely consider reducing or cutting back on? Please select all that apply

Instant food, packaged snacks and beverages are the top categories to be cut back during a price increase.

What do shoppers cut first when prices rise?



Q: Imagine the grocery item(s) you purchase regularly have observed an increase in price over time. Which of the following items will you likely consider reducing or cutting back on? Please select all that apply



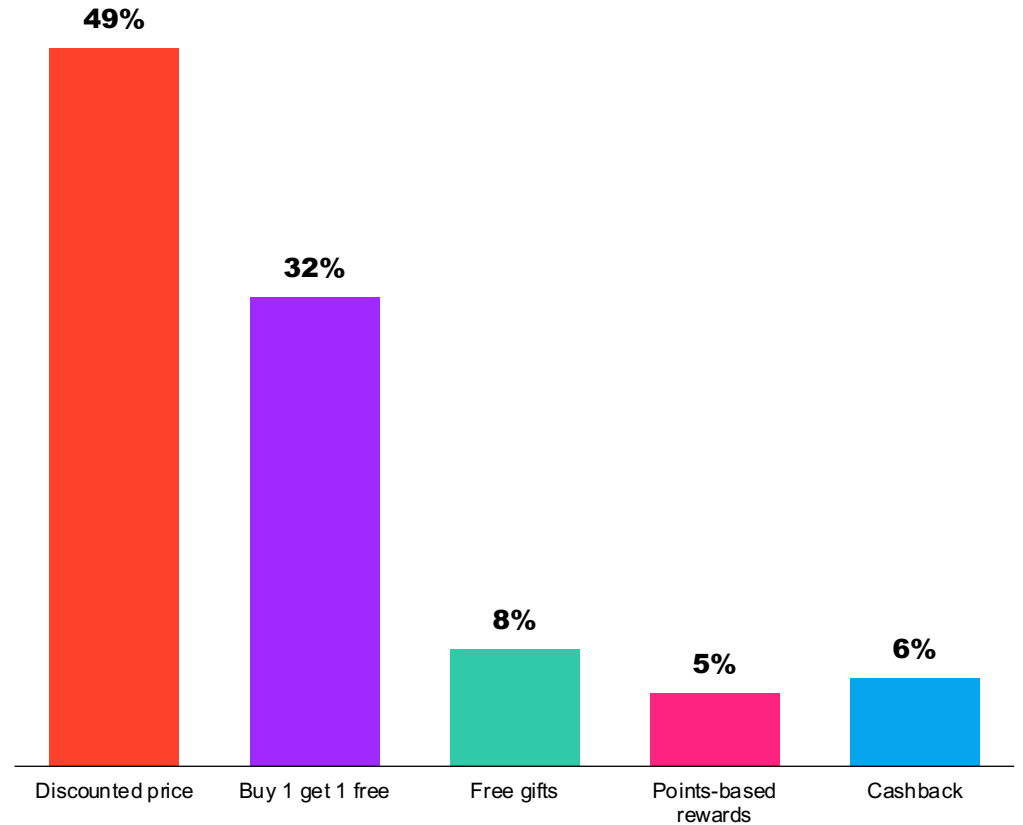
Discounted prices are the most influential promotion type.

While this holds true across the board, regional preferences vary. "Buy 1 Get 1 Free" resonates in Thailand (48%), while Australians (66%) prioritize Discounts vs other promos.



Get in touch

Promotions that drive grocery purchases



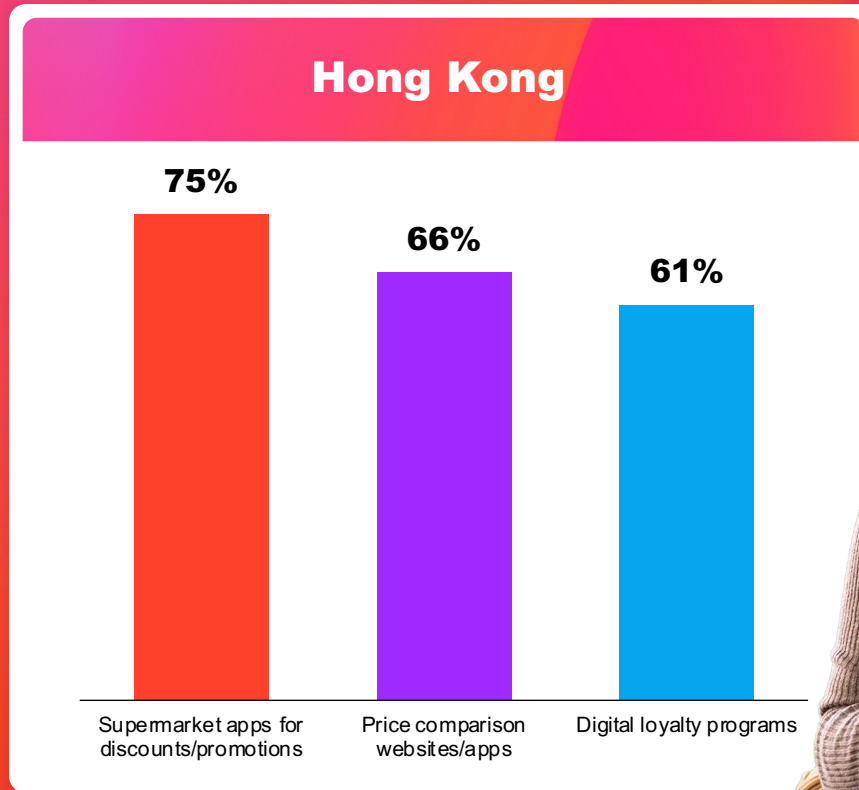
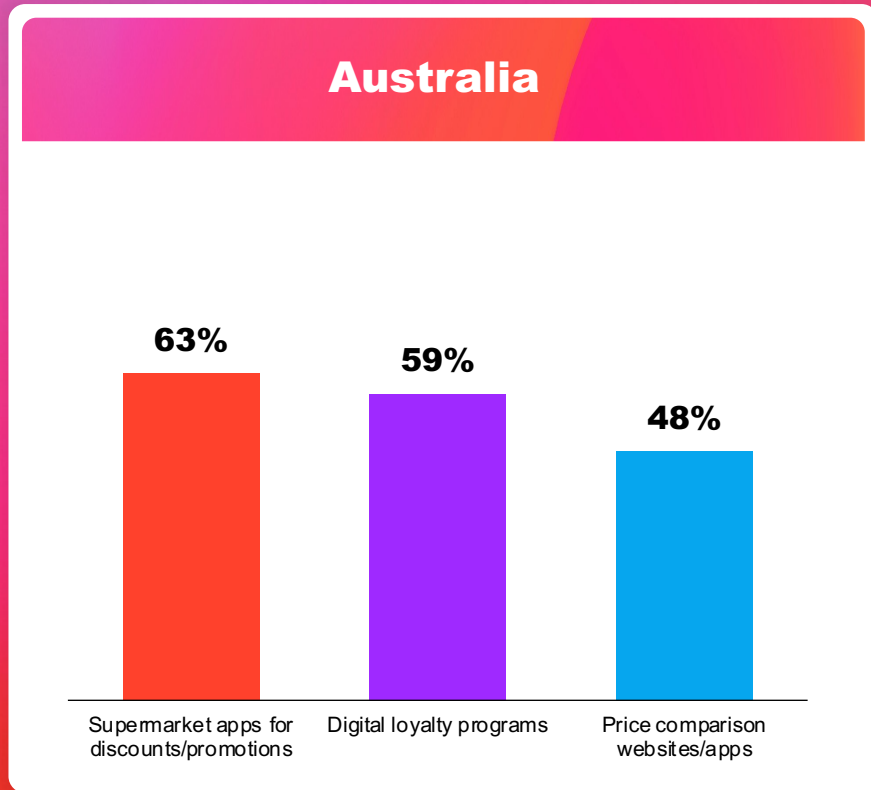
Q: Please rank the following types of promotions, in the order of how they influence your grocery purchases the most.

Digital tools and impact of ads on shopping behaviour

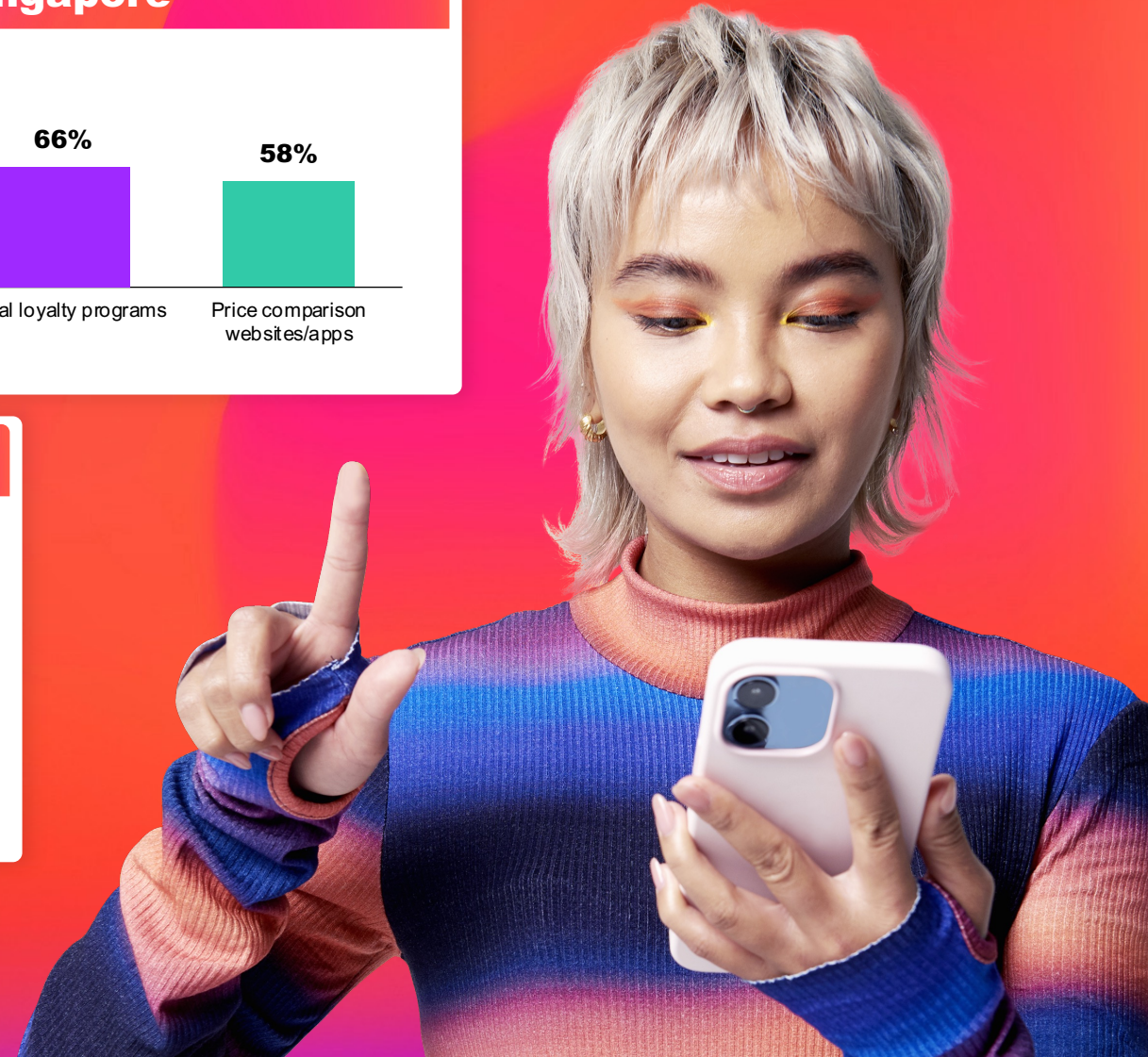
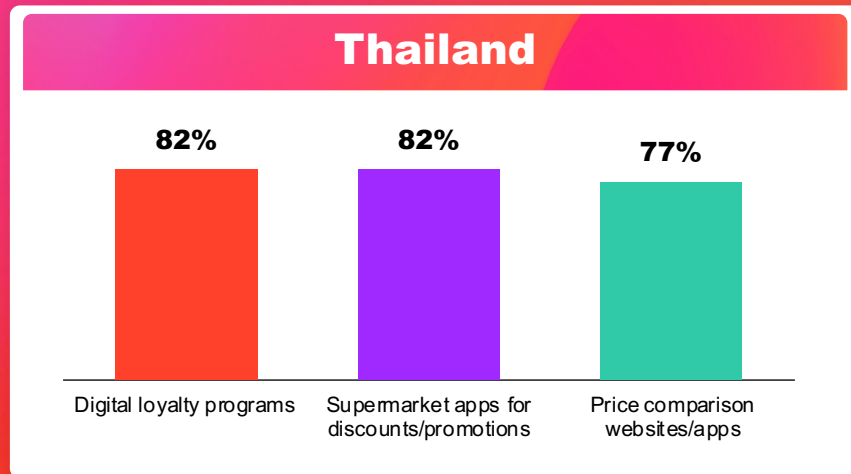
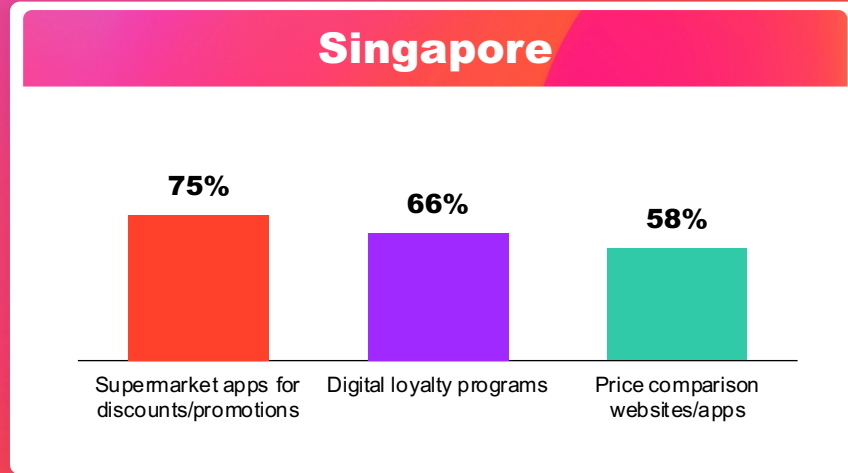
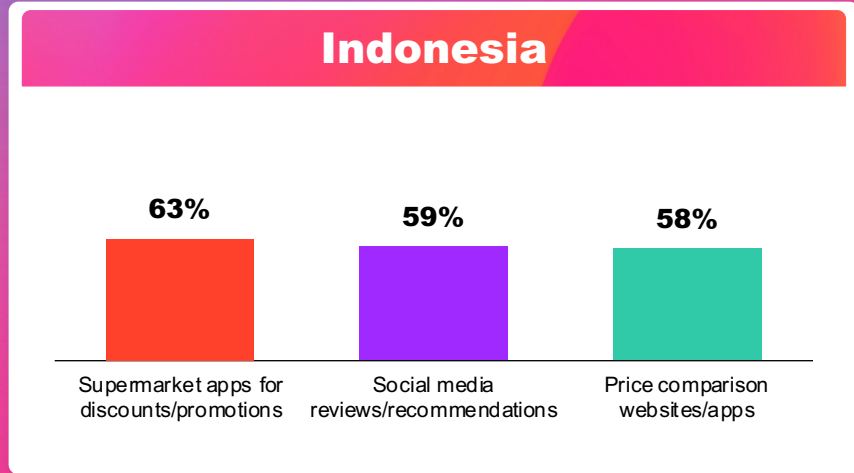


Digital apps and tools driving the future of grocery shopping

APAC consumers are highly receptive to using digital tools, especially supermarket apps for discounts and promotions that enhance the shopping experience.

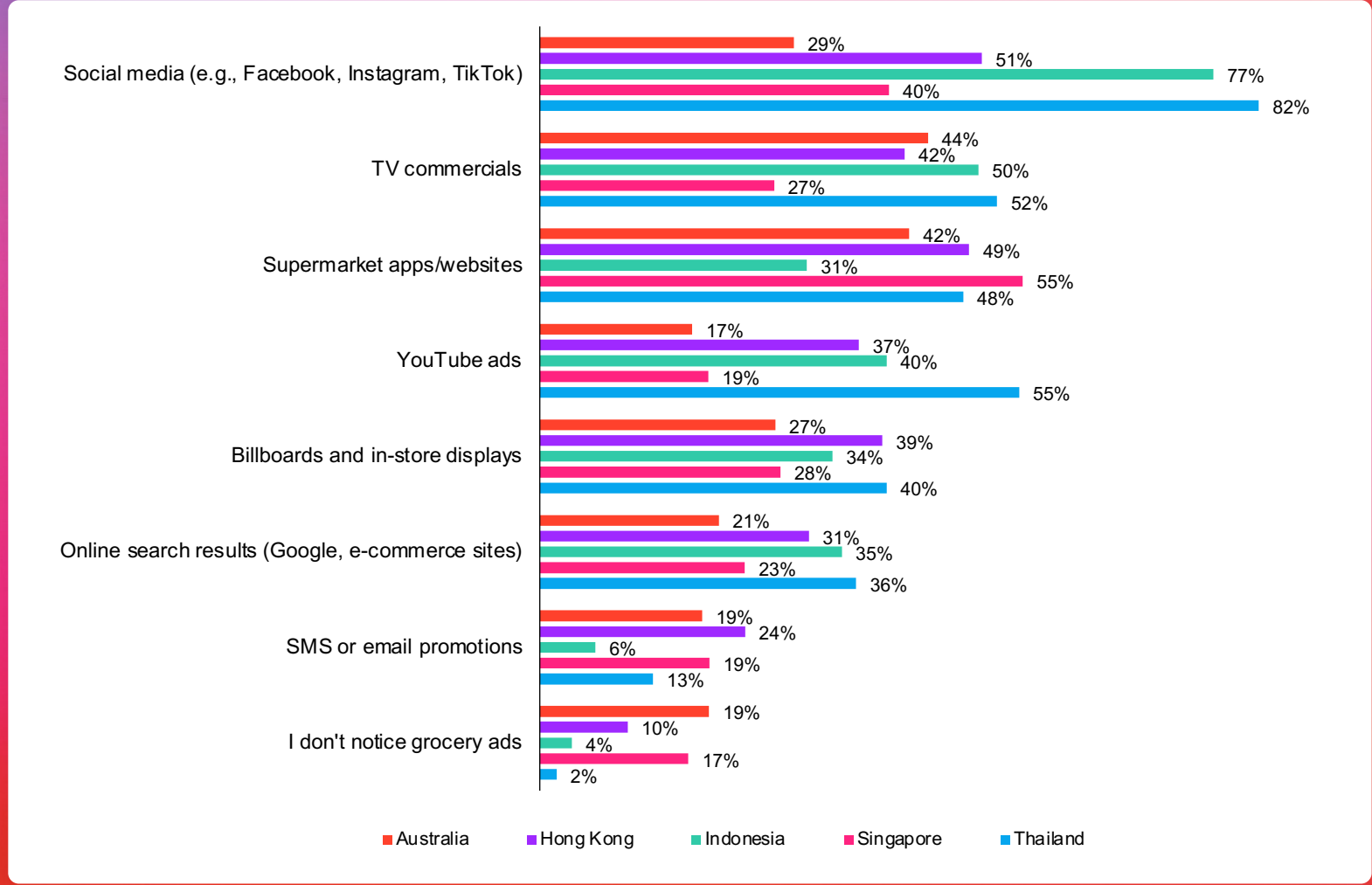


Q: How likely or unlikely are you to use each of the following digital tools/apps to help with your grocery shopping? (Data shows % for "Very likely" and "Likely")



Q: How likely or unlikely are you to use each of the following digital tools/apps to help with your grocery shopping?
(Data shows % for "Very likely" and "Likely")

Social media and TV are the top platforms for noticing grocery ads.



Q: Where do you usually notice ads related to grocery products? Please select all that apply.

Australia's ad habits diverge from APAC norms

TV ad recall (44%)
outpaces social media (**29%**)
in **Australia**, opposite of
most APAC markets.

**Highest rate of not
noticing grocery ads
among Aussies (19%)**
vs. APAC average (8%).

**Lower influence of
YouTube ads (17%)**
vs. APAC average (38%).

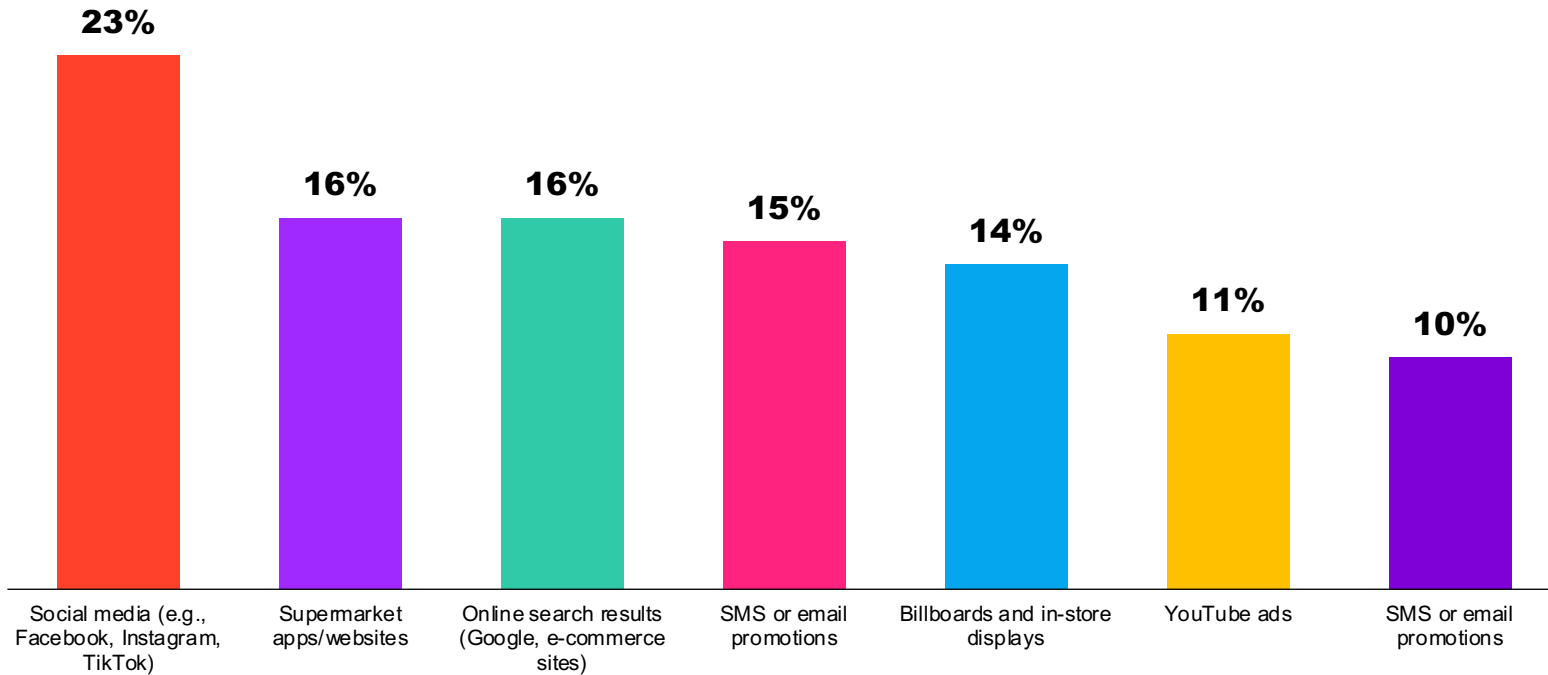
**Social media ad
influence significantly
lower in Australia (29%)**
vs. APAC average (62%).



Q: Where do you usually notice ads related to grocery products? Please select all that apply.

Social media triggers instant grocery decisions

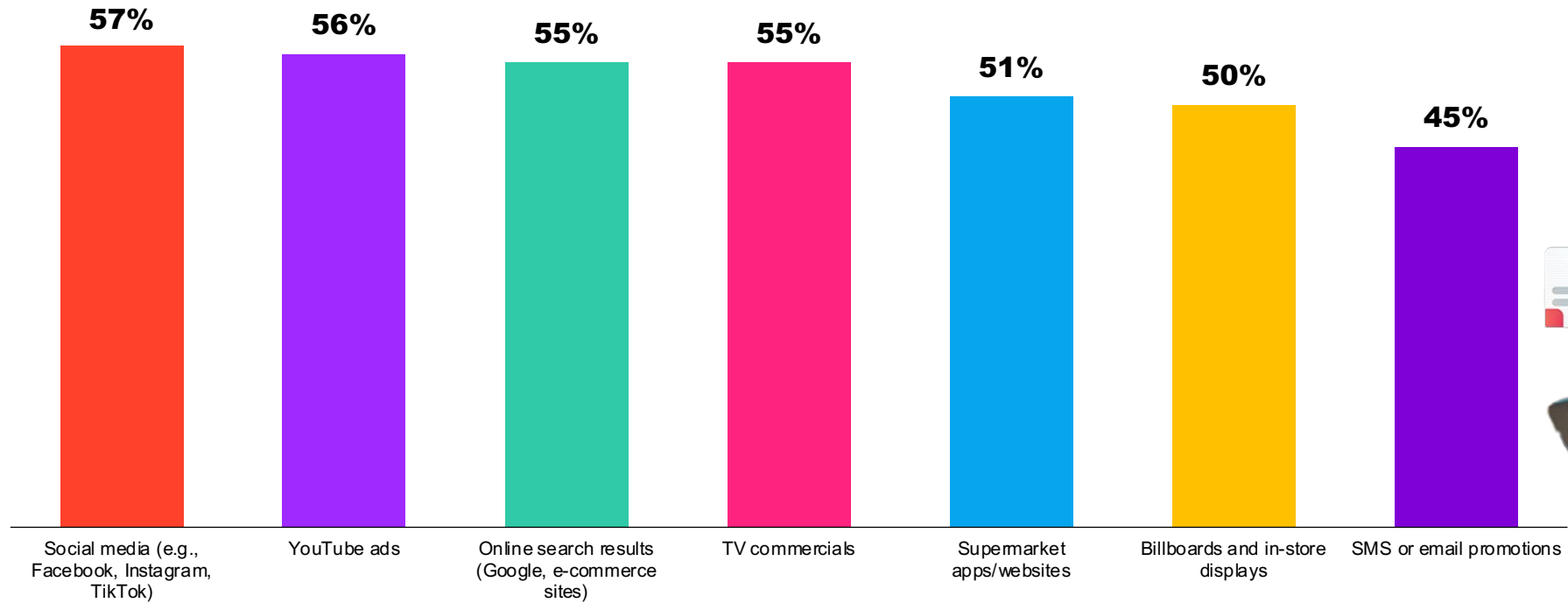
Immediate purchase influence : "They often lead me to buy a product immediately."



Q: How do grocery ads influence your shopping decisions?

Social media and YouTube ads spark new product finds

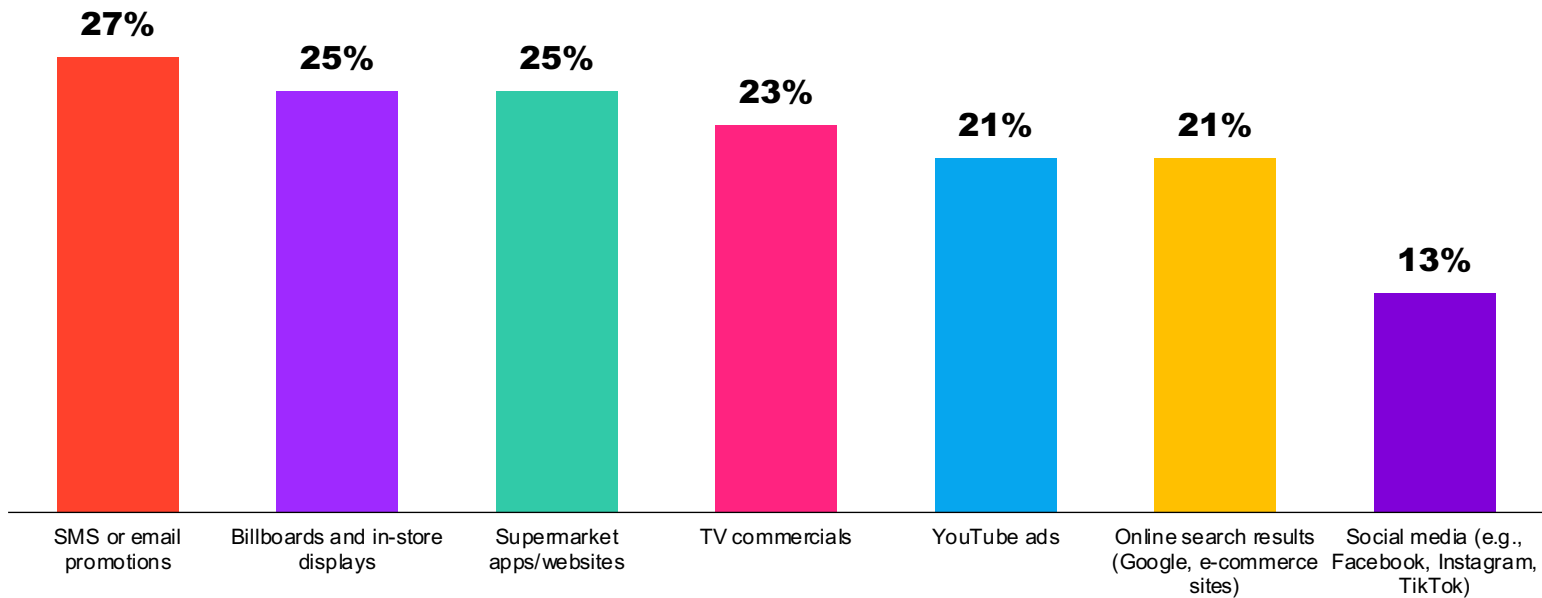
Discovery of new products : "They help me discover new products or brands, but I may not buy right away."



Q: How do grocery ads influence your shopping decisions?

SMS and email promotions excel in reminding consumers of planned grocery purchases

Reminders for planned purchases : "They remind me to buy something I already planned to purchase"



Q: How do grocery ads influence your shopping decisions?

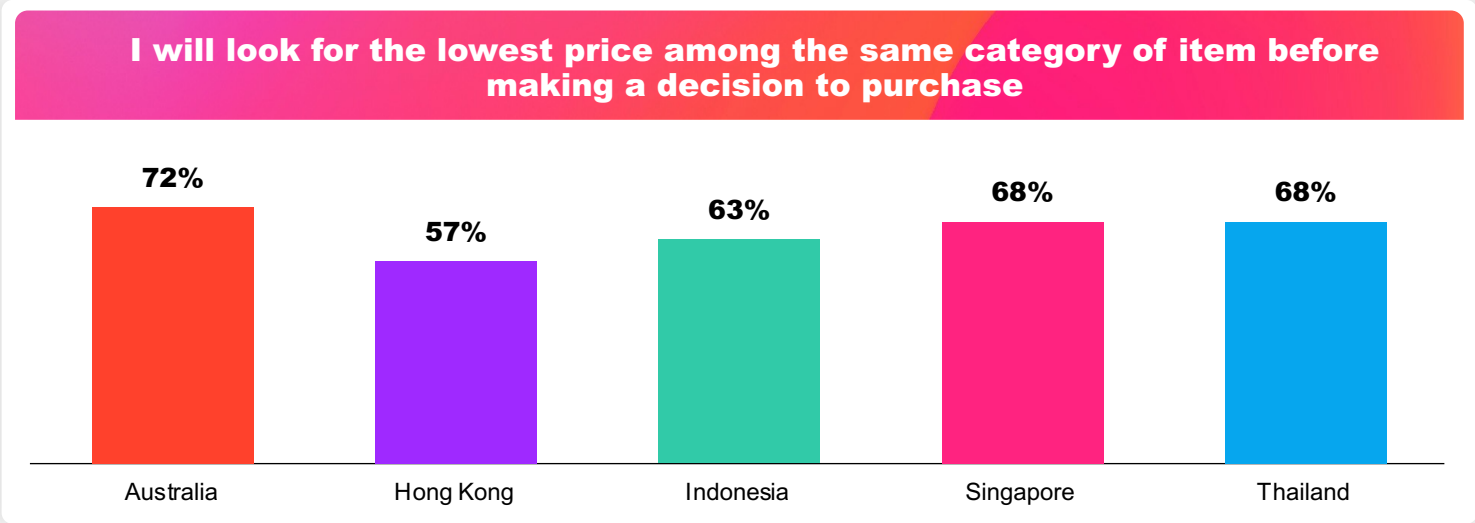
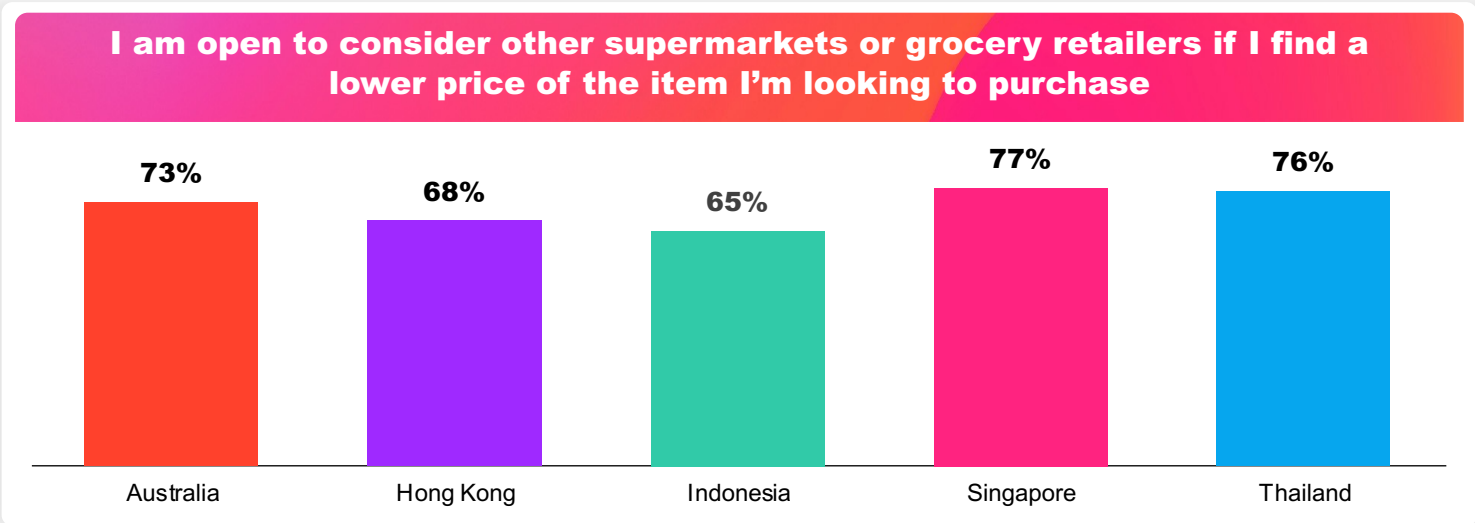


Shopper mindsets



Price-conscious shoppers

Thais and Singaporeans lead in price sensitivity and budget planning.

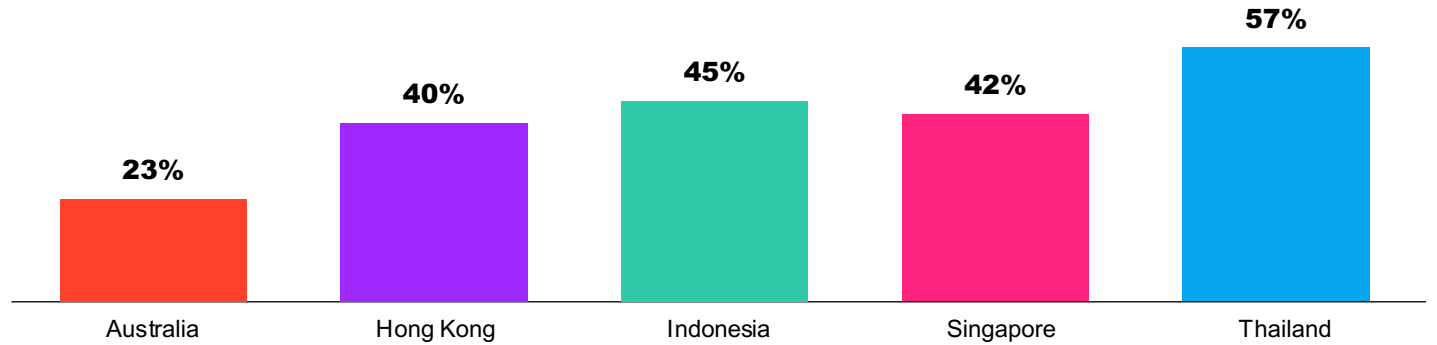


Q: We will now show you some statements around common habits on grocery shopping. To what extent do you agree or disagree? Net Agree

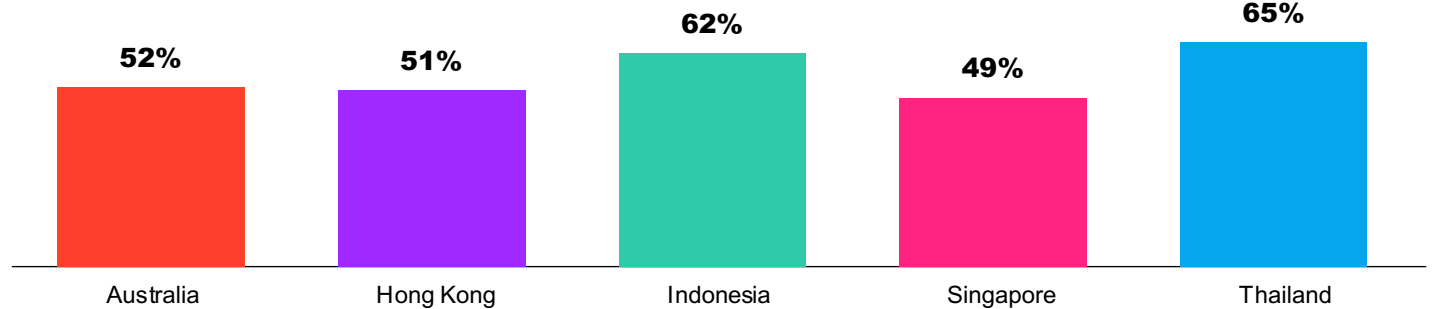
Price-conscious shoppers



I typically wait for shopping events (eg. Festive sales, 11.11 double-digit, date event sales) to stock up on my grocery purchase(s)



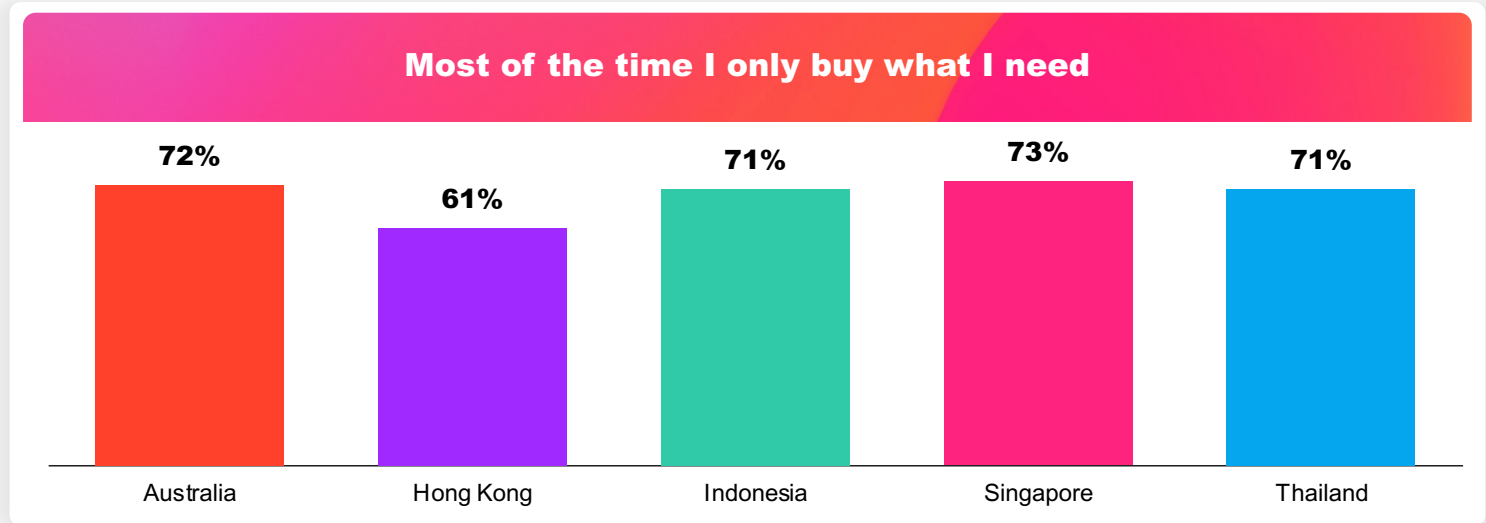
I typically stick to a strict budget for grocery purchase(s)



Q: We will now show you some statements around common habits on grocery shopping. To what extent do you agree or disagree? Net Agree

Routine shoppers

Australians are more habitual shoppers; Hongkongers show less consistency. Shopping is a family affair in Indonesia and Thailand.

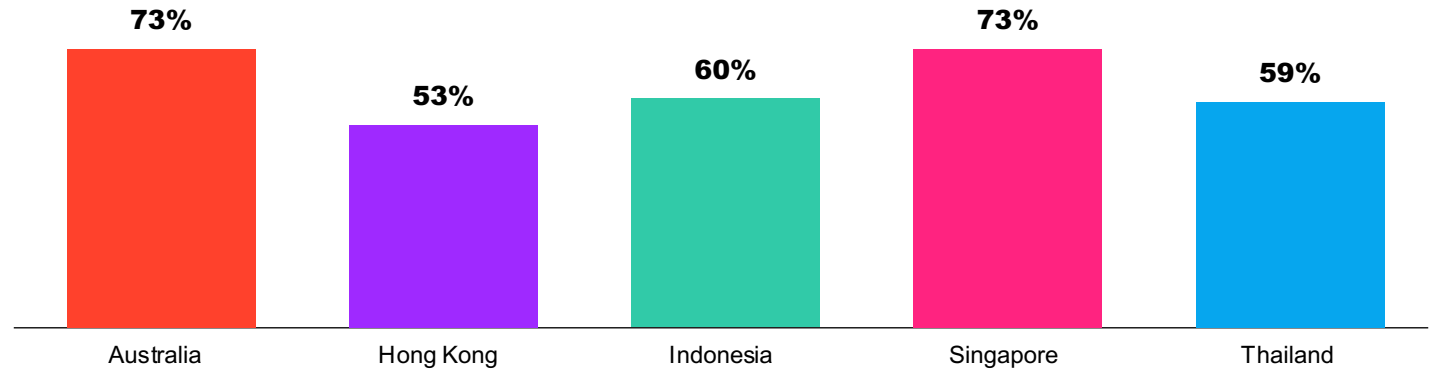


Q: We will now show you some statements around common habits on grocery shopping. To what extent do you agree or disagree? Net Agree

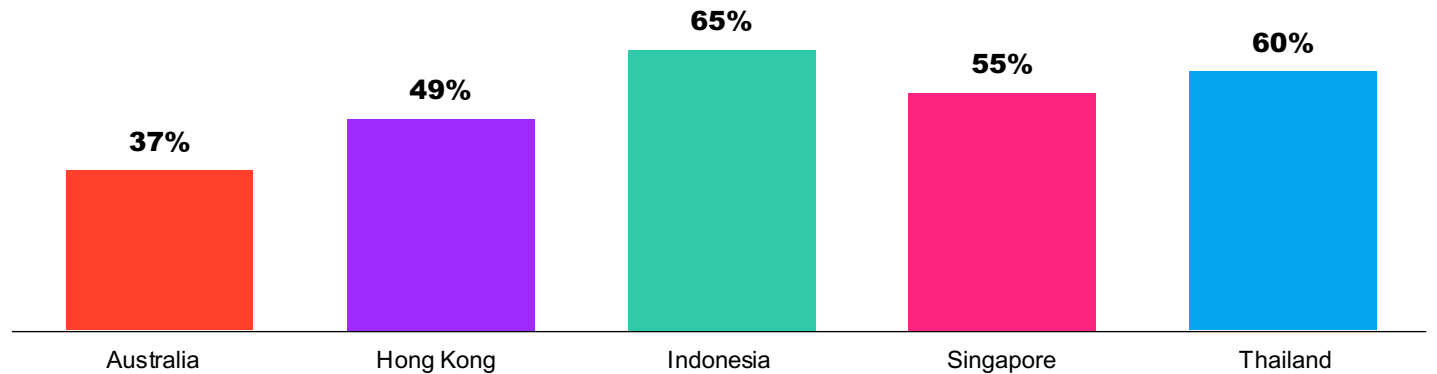
Routine shoppers



I tend to always shop at the same supermarket and grocery retailer



I enjoy grocery shopping as a family activity



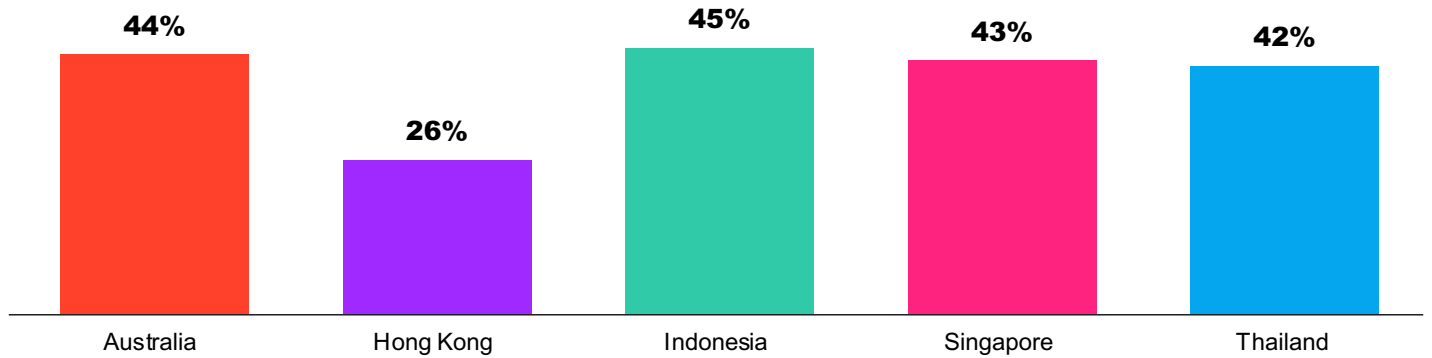
Q: We will now show you some statements around common habits on grocery shopping. To what extent do you agree or disagree? Net Agree

Impulsive but mindful shoppers

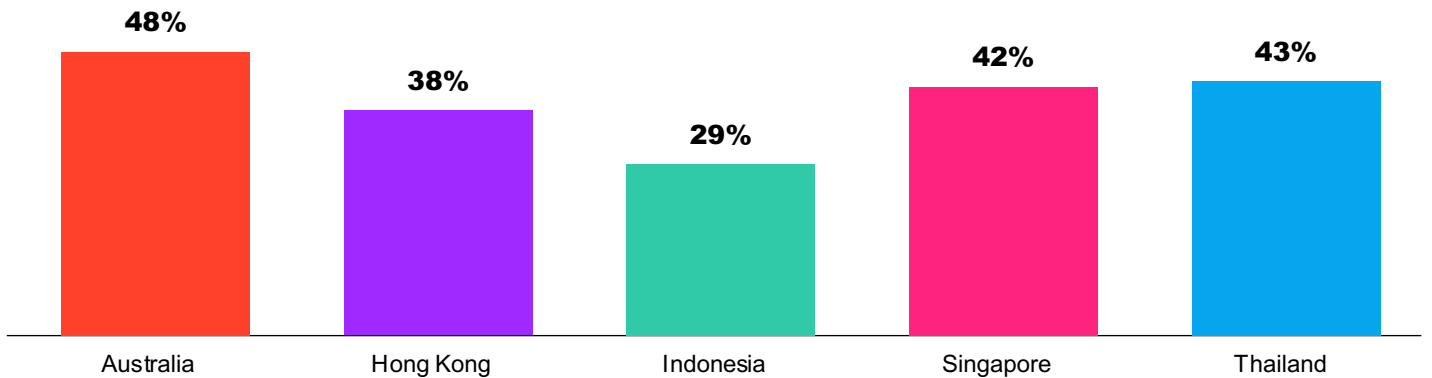
Australians and Thais are more prone to impulse buys; guilt highest in Indonesia.



I feel guilty when I buy snacks or treats that was not part of my plan.



I enjoy grocery shopping as a family activity



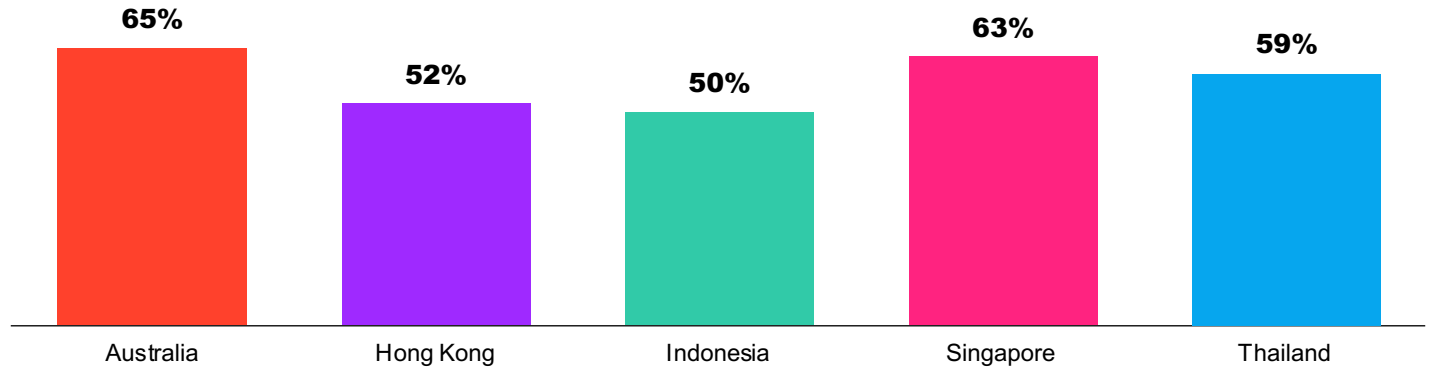
Q: We will now show you some statements around common habits on grocery shopping. To what extent do you agree or disagree? Net Agree

Adventurous vs. cautious shoppers

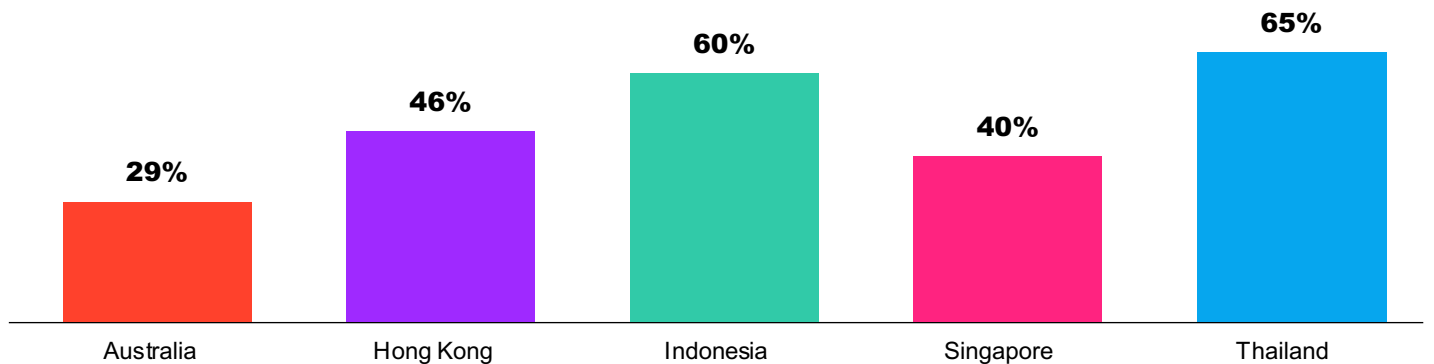
Aussies and Singaporeans embrace new brands, while Indonesians and Thais seek reviews first.



I'm open to trying out a new product or a new brand that I'm not familiar with



I typically rely on online reviews before trying out a new product or brand



Q: We will now show you some statements around common habits on grocery shopping. To what extent do you agree or disagree? Net Agree

Report takeaways



Supermarket vs convenience store

While physical supermarket is the top choice for grocery shopping. Indonesian and Thai consumers are also relying on convenience stores.



Frequency of shopping

Most people are shopping groceries once a week, with Indonesians being less frequent and Thais being more frequent.



All about price

Most consumers pick out the preferred supermarket based on price/value for money, with convenience (location and opening hours) as the next considering factor.



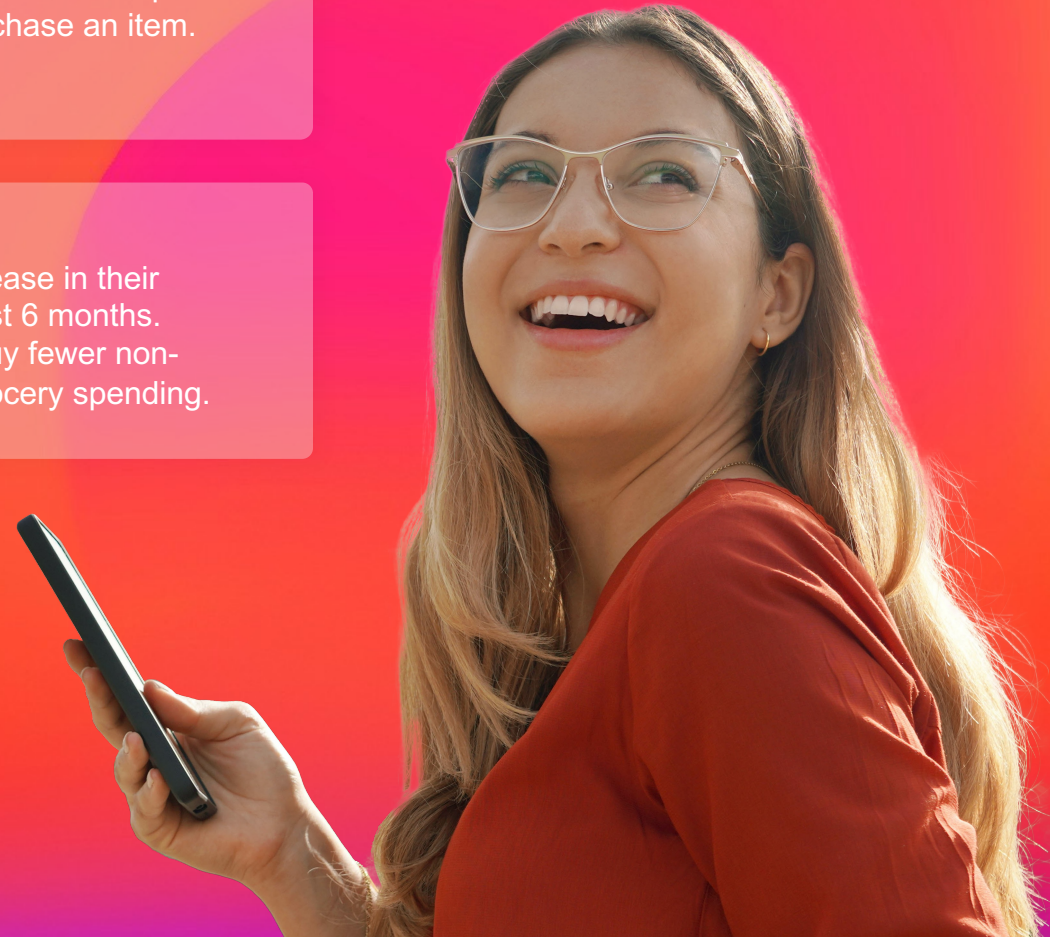
Preference for digital tools

Close to half (49%) of consumers said they prefer using supermarket apps for discounts, and 23% said that social media is the top platform that led them to purchase an item.



Cut back or switch?

4 in 10 have noticed an increase in their grocery spendings in the past 6 months. Consumers are looking to buy fewer non-essential items to reduce grocery spending.



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Methodology

The data from this study is taken using YouGov Surveys: Serviced, which provides quick survey results from nationally representative or targeted audiences in multiple markets. This study was conducted online on 25 March 2025 – 6 April 2025, using a questionnaire designed by YouGov. For this report, the following population representation was used:

Market	Sample size (n=)	Representation
Australia	1,050	National Representative (18+)
Hong Kong	1,032	National Representative (18+)
Indonesia	2,018	Online Representative (18+)
Singapore	1,086	National Representative (18+)
Thailand	2,066	Online Representative (18+)

[Get in touch](#)

Thank you

/Research Reality

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