

UNDERSTANDING THE PEOPLE SHAPING TOMORROW

GLOBAL
INFLUENTIALS

**Ipsos Global
Influentials helps
you understand the
needs and desires of
today's most
powerful people.**

Who are 'Influentials'?

Top 20% of adults in terms of Household Income in each market

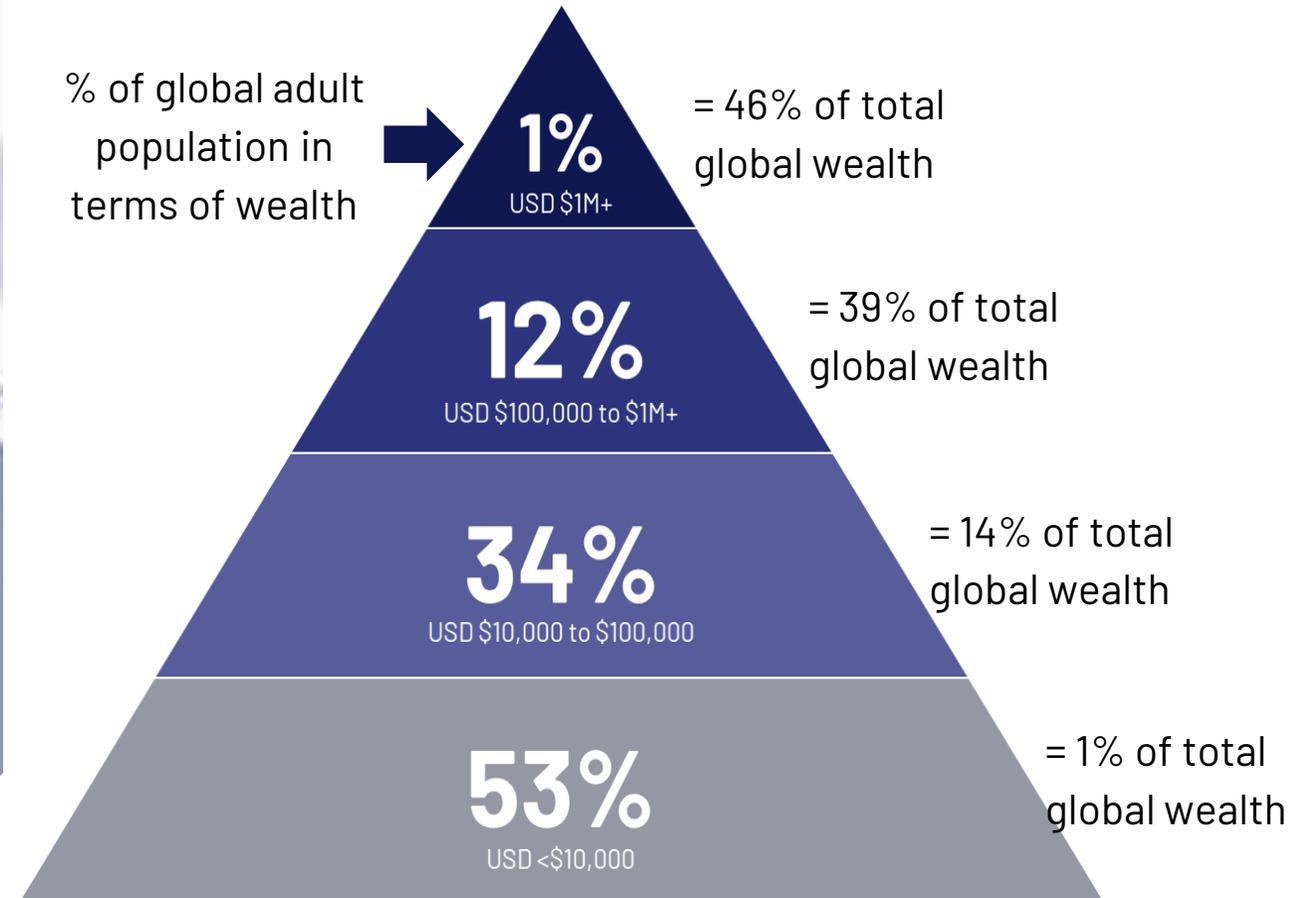
Representing **272 million** influentials globally



Reaching those who shape economies

The **Top 20%** of the world's population (in terms of wealth) holds **in excess of 90%** of the total global wealth!

Source: Global Wealth Report 2023



The *Company Leaders*

They are at the top of the business decision-making ladder in established companies. They are hard to reach, making up only **3% of Global Influentials**

Age 25+

FT/PT employee
at a private
company or NGO

Company size
50+ employees

Top
management job
title (C Suite/
President/ VP)

Company
director, Board
member

Or oversee
company spend
value at
US\$500K+



Real insights from real people collected throughout the year

- Continuous year-round survey
- Inaugural release: April 2025
(Data from June to October 2024)
- Next release: April 2026





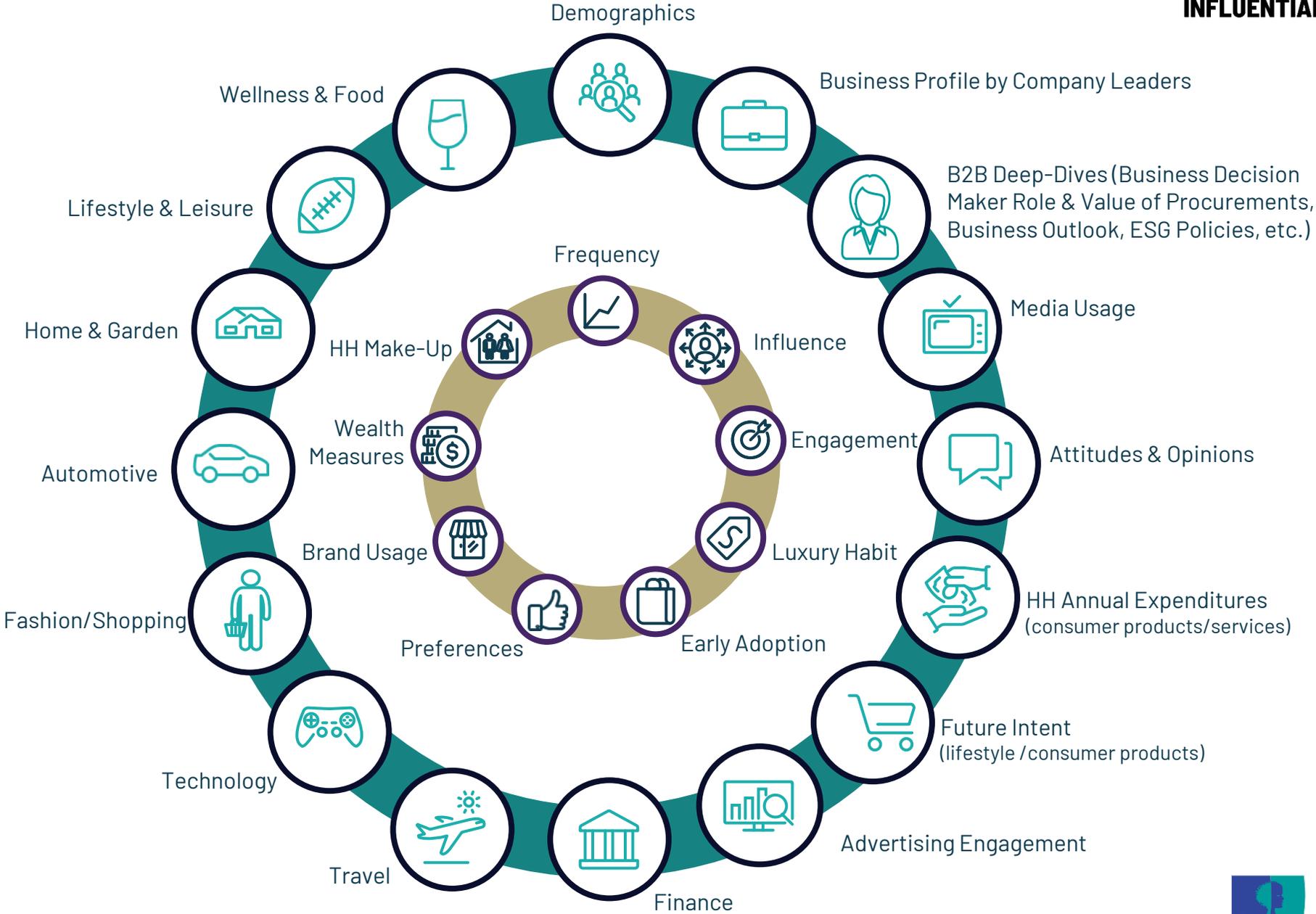
A total of **93,000**
Influentials surveyed
across the world
(17,000 Company Leaders)

Extensive reach across APAC markets – 27,200 Influentials including 7,000 company leaders

China:	n=2,700	Indonesia:	n=1,900
India:	n=2,700	Malaysia:	n=1,900
Japan:	n=2,700	Philippines:	n=1,900
Singapore:	n=2,700	South Korea:	n=1,900
Australia:	n=2,500	Taiwan:	n=1,900
Hong Kong:	n=2,500	Thailand:	n=1,900



Total Understanding of the World's Most Powerful Audiences



Measures over 2,000 brands

	92	vehicle makes household owns		171	personal care/fragrance brands personally used
	128	apparel brands personally owns		50	beer/ale/lager brands consumed
	69	watch brands personally owns		32	champagne/prosecco/sparkling wine consumed
	51	jewelry brands personally owns		79	spirits/liqueurs consumed
	22	computer/laptop brands household owns		61	household appliance brands household owns
	25	Mobile phone brands household owns		92	airlines flown
	18	tablet/eReader brands household owns		115	airports used
	18	camera brands household owns		68	hotels/resorts/rental properties stayed
	30	home electronic brands household owns		199	financial institutions used

Understand Who they are, What they do and How to reach them

WHO

Income
Age/ Gender/ Education
Household composition
Job position
Industry
Opinion forming

WHAT

Purchases intent/ Business decision
Technology
Automotive
Travel
Finance
Luxury
Interest and Activities
Attitudinal statements

HOW

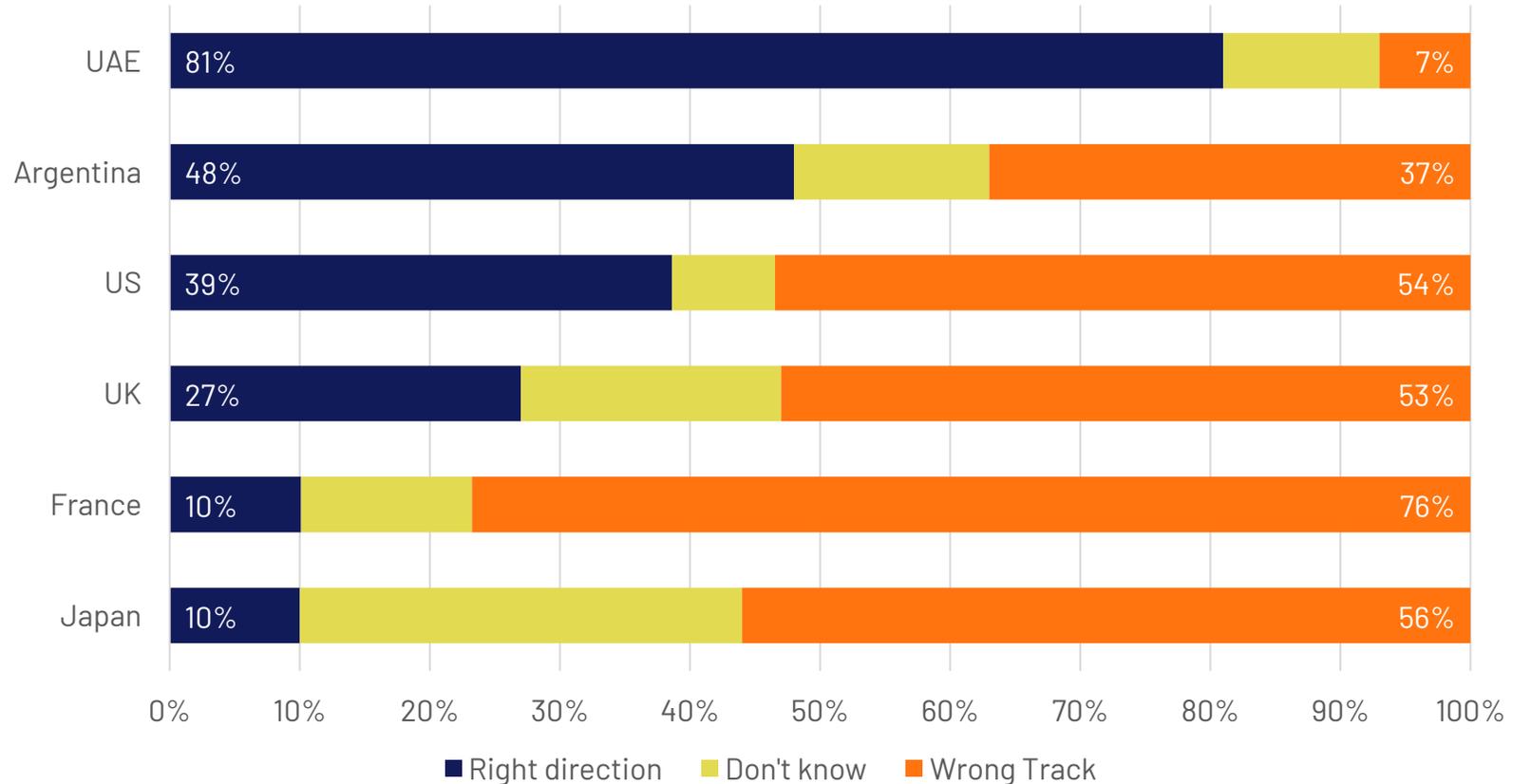
700+ media brand measurement
Media brand engagement
Platforms used
Day-part viewing
Video Streaming
Audio
Podcasts
Social Media

THE POWER OF IGI: UNLOCKING INSIGHTS

Influential outlook

In many regions there is a great deal of dissatisfaction with how the country is moving forward

Country moving in right direction or on wrong track

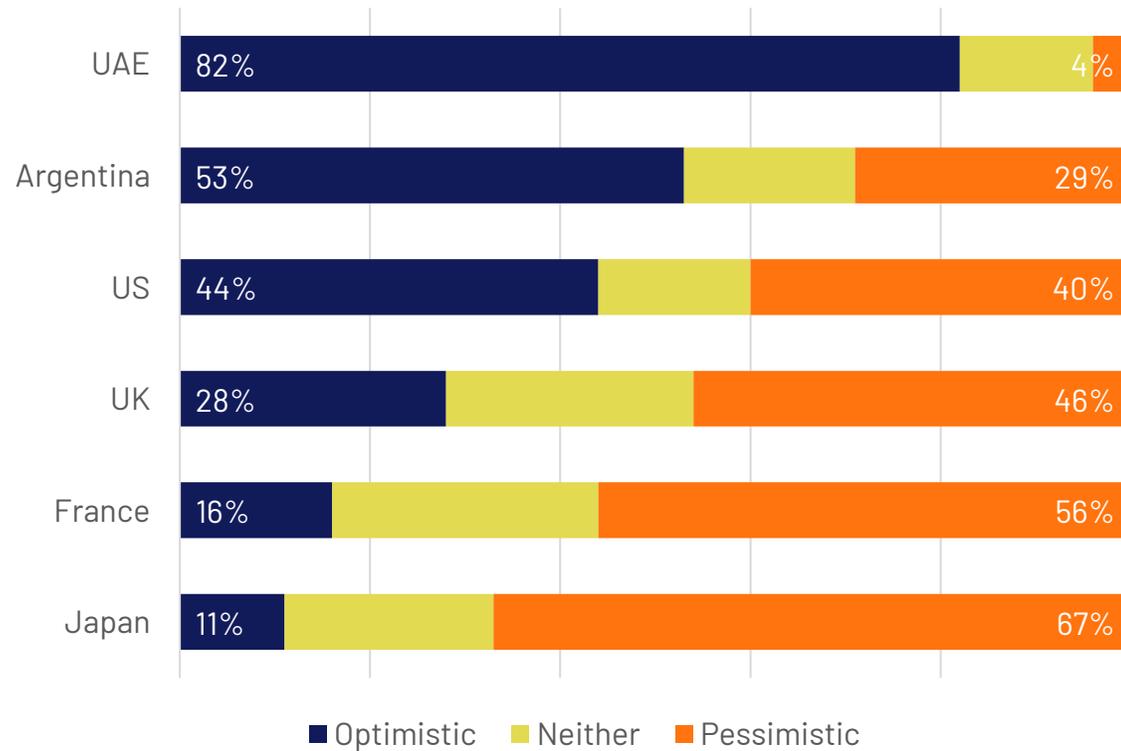


Q. Generally speaking, would you say that things in your country are heading in the right direction, or are they off on the wrong track?

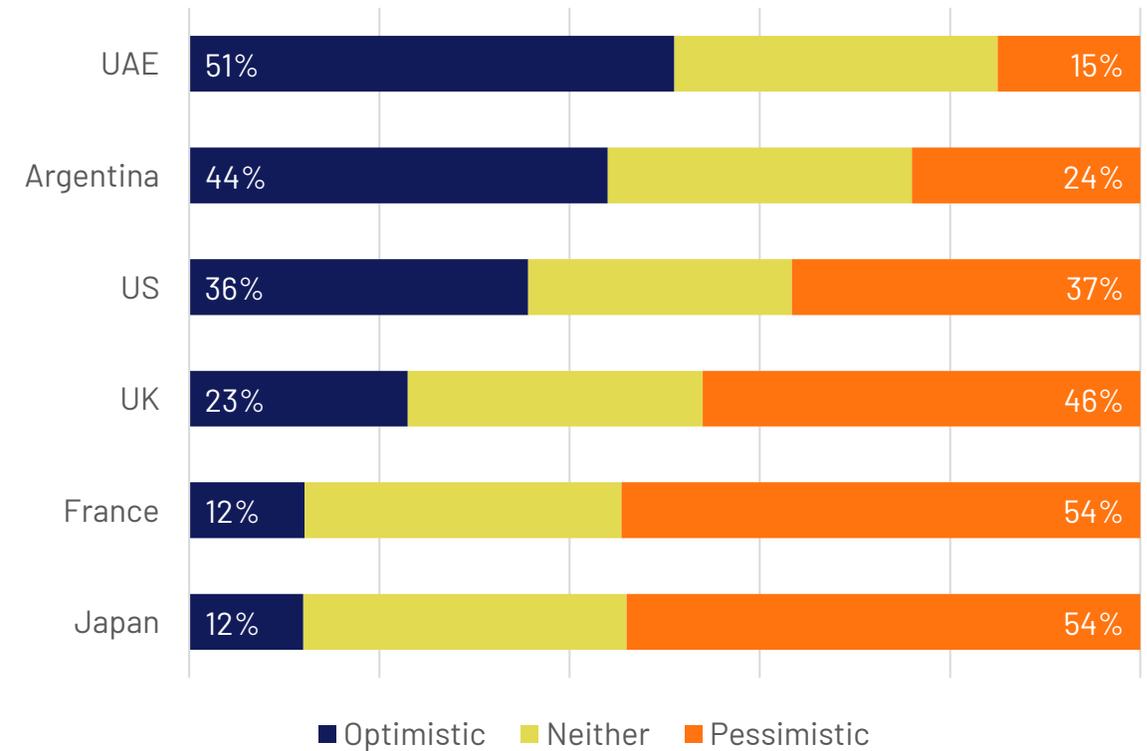
Source: Ipsos Global Influentials Barometer March 2025

Influentials perceptions about the economic outlook vary wildly across regions

Optimism about **country's economy**



Optimism about **global economy**



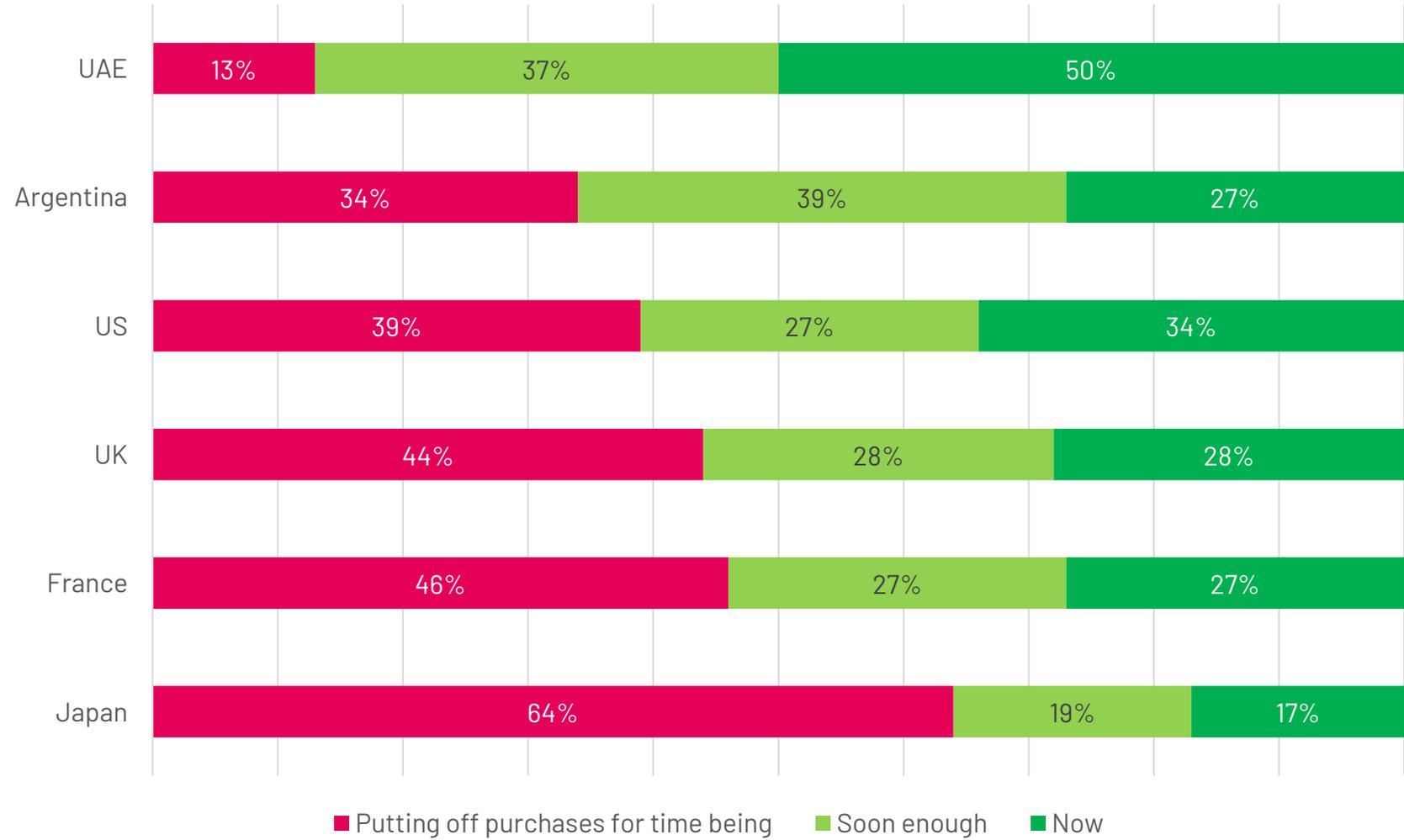
Q. How optimistic or pessimistic are you, yourself, about the economy in your country going forward?

Q. How optimistic or pessimistic are you, yourself, about the global economy going forward?

Source: Ipsos Global Influentials Barometer March 2025

Majority of Influentials are still in buying mode

Good time to make major purchases



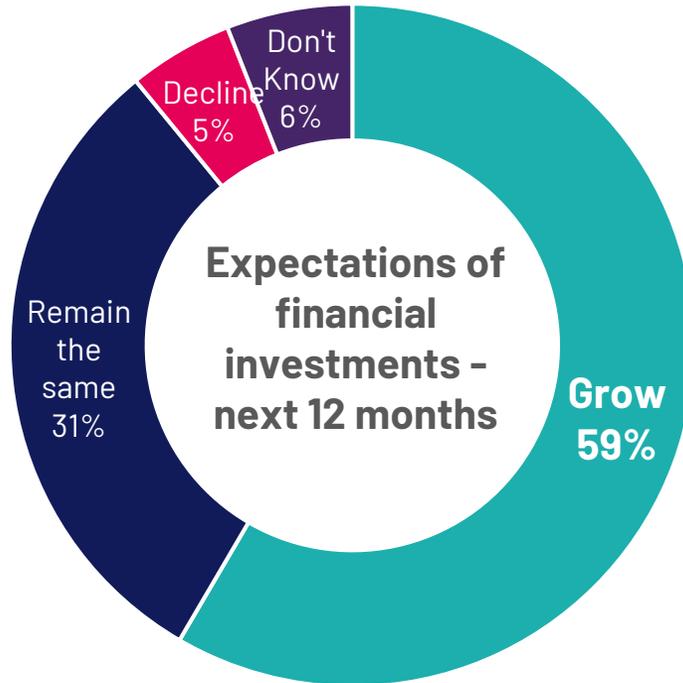
THE POWER OF IGI: UNLOCKING INSIGHTS

Pursuits of global influentials

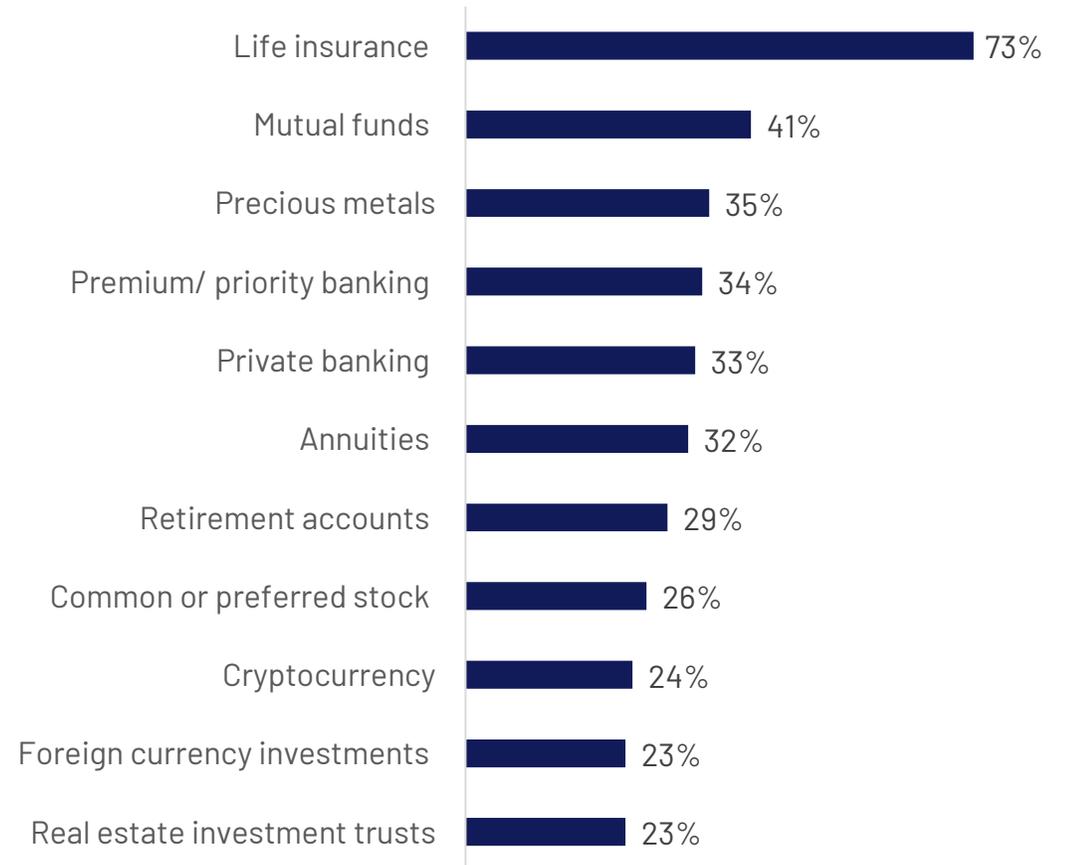
APAC High Net Worth Individuals (HNWI)

59% expect to grow their portfolio

17% of APAC Influentials are **High Net Worth Investors** (Liquid Assets \$1M+ USD)



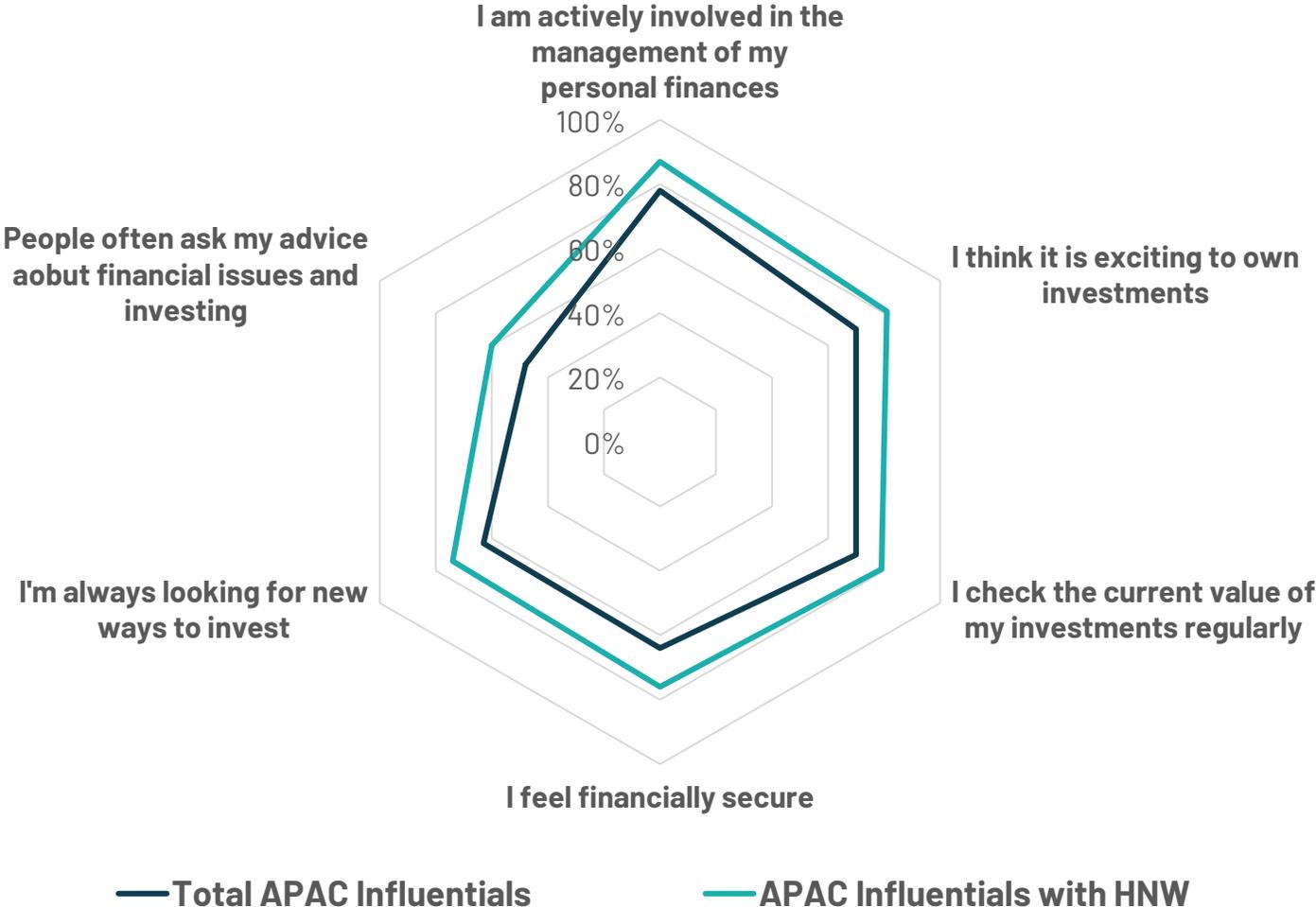
HH Investment/Financial Products



Wealth management of APAC HNWI

They are engaged and influential financial leaders

Confident in their financial security and eager to explore new investment avenues, presenting a unique opportunity for tailored financial advice and products.



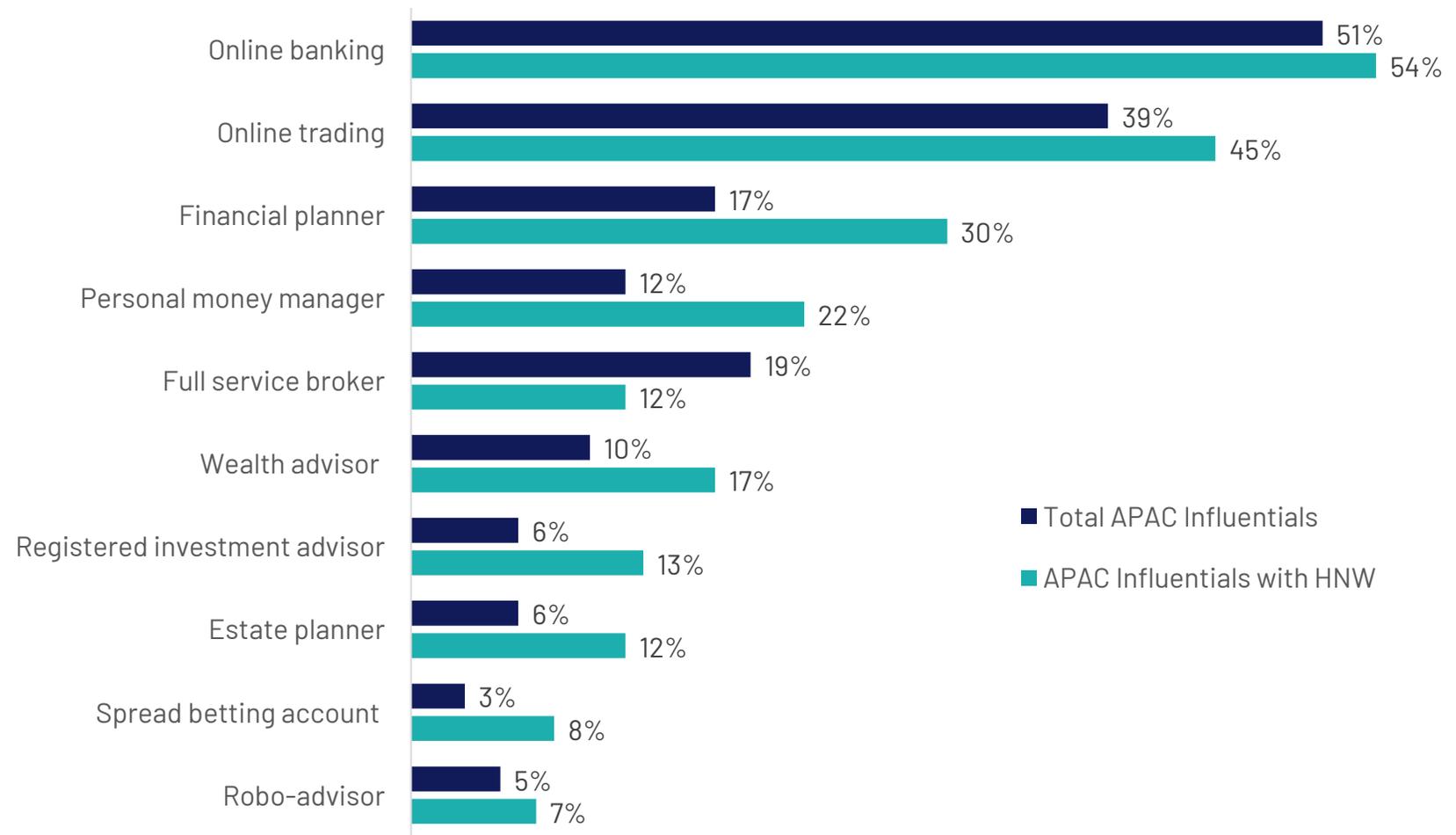
Source: Ipsos Global Influentials 2024, APAC Region
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Offer a comprehensive suite of services to meet APAC HNWI's diverse needs.

Diverse Financial Service Usage of APAC HNWI

Financial services used in the past 12 months



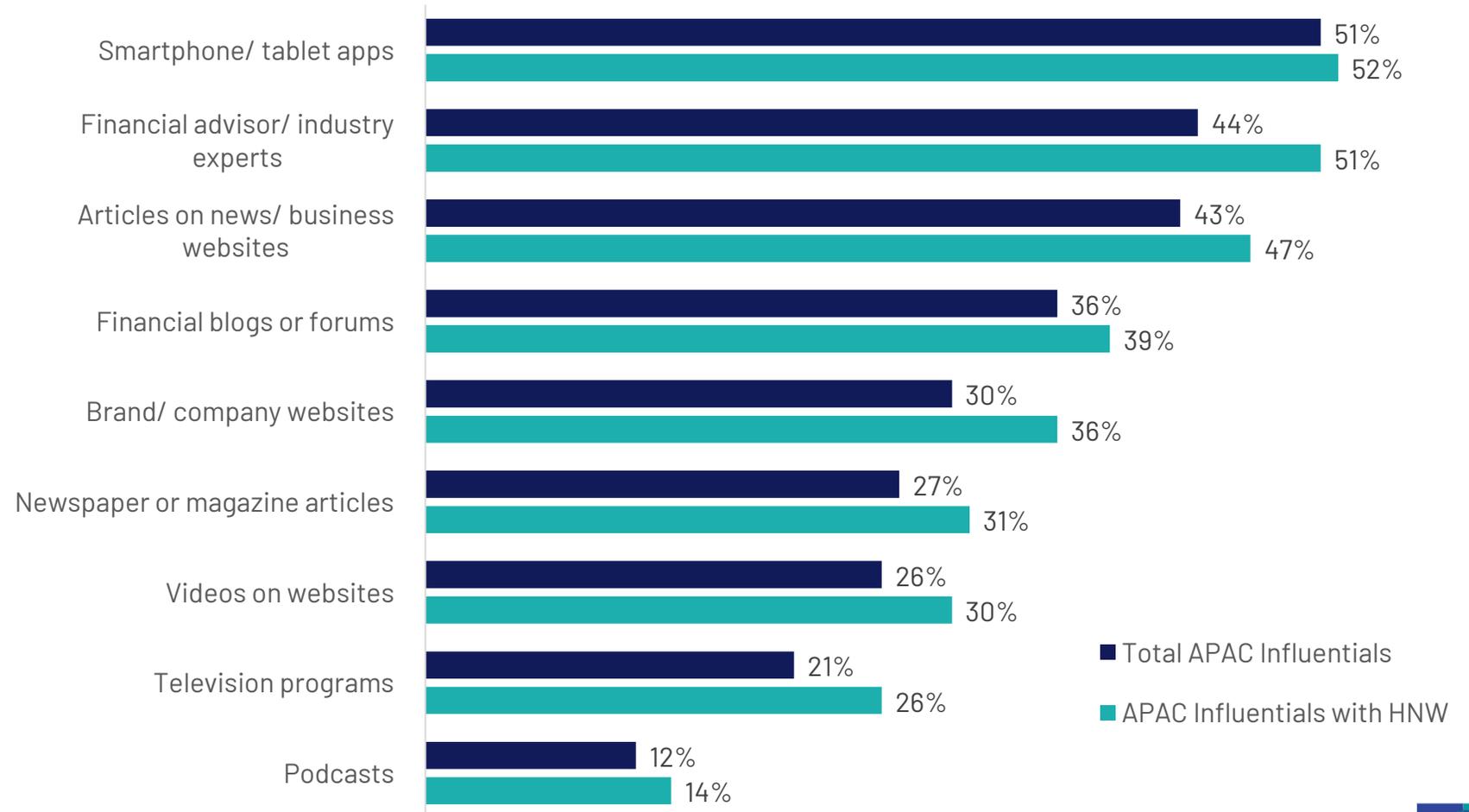
Source: Ipsos Global Influentials 2024, APAC Region
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Reaching APAC HNWI: Pivotal role of financial advisors and digital channels

Prioritize a multi-channel approach that combines digital engagement with personalized advice and expertise to reach APAC HNWIs.

Most useful sources of information when making personal financial decisions



Source: Ipsos Global Influentials 2024, APAC Region

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A person wearing a beige coat is holding a light-colored shopping bag. The background shows a clothing rack with various garments, a lamp with a textured orange shade, and a tufted chair. The overall scene is a boutique or clothing store.

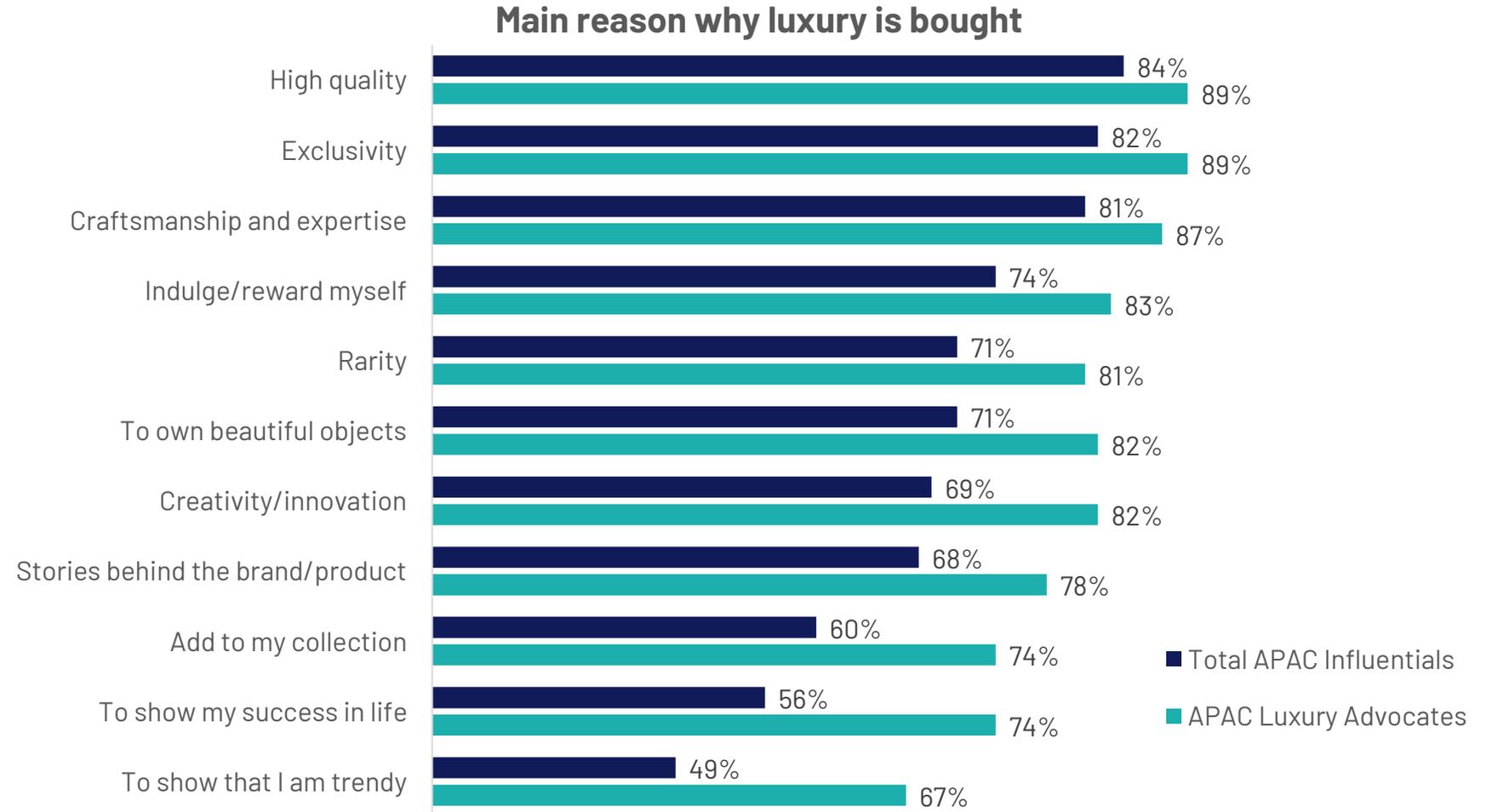
33%

of APAC Influentials are Luxury Advocates*

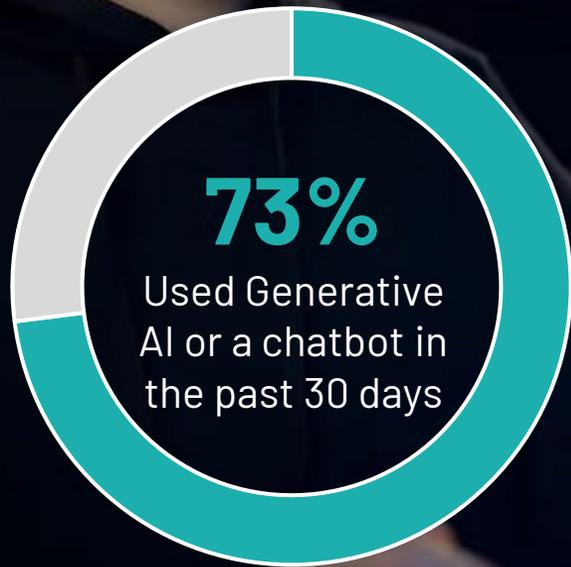
* Luxury Advocates = "I influence other people's behaviors, opinions and thoughts about luxury products and services" AND "I prefer to buy designer or luxury brands AND "I talk to many different people about luxury products or services" OR "I like to find out about new trends and be knowledgeable about luxury products or services" OR "Luxury is about making me feel special" OR "Luxury products help me stand out in a crowd"

The Luxury Code: Quality, Exclusivity & Narrative

Luxury is more than just a product; it's a carefully curated experience built on quality, exclusivity, and a captivating brand narrative..



Luxury Advocates are Digitally Savvy



82%

enjoy reading/
learning about new
technology products

82%

follow the
developments in
technology

80%

believe that
premium technology
brands are worth the
additional cost

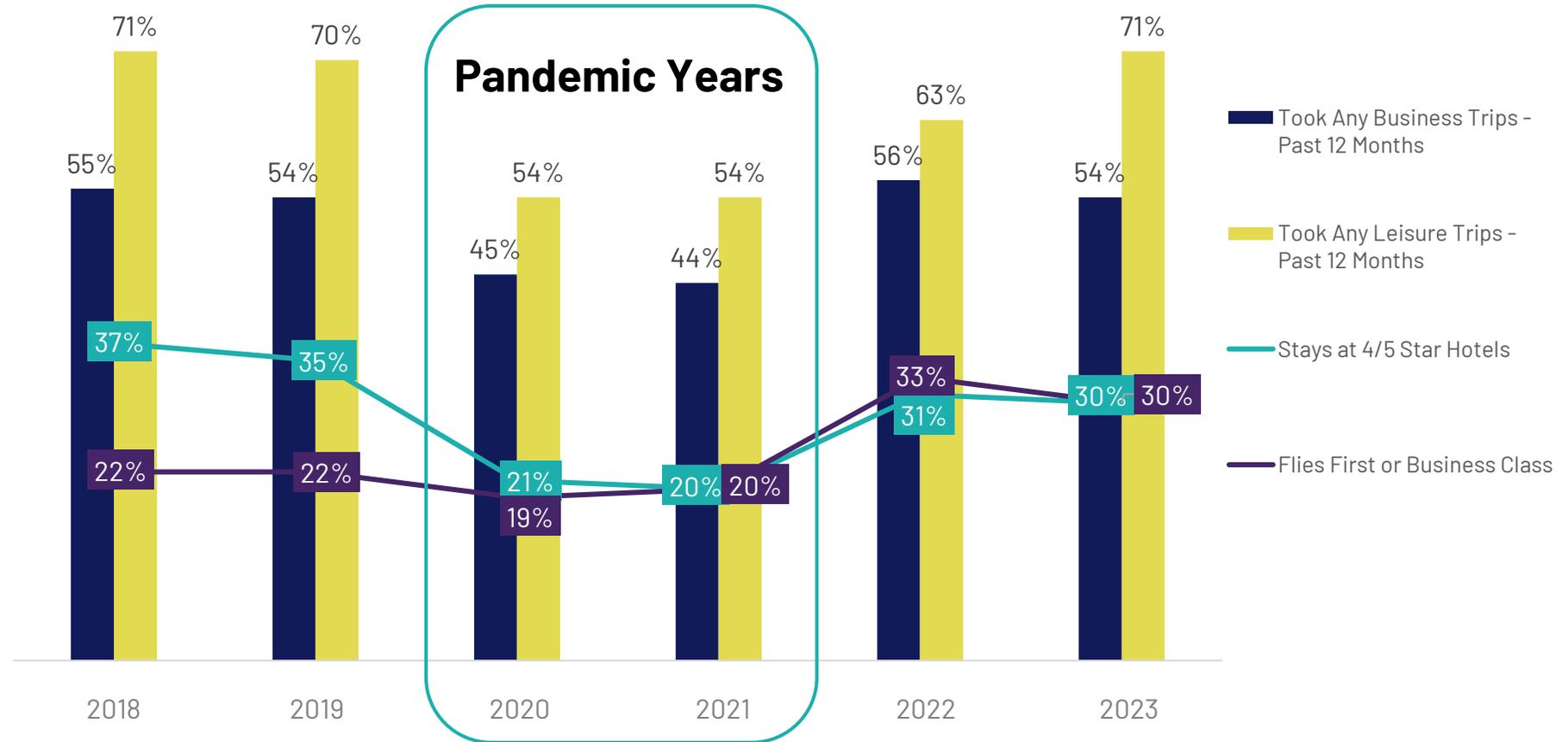
62%

always one of the
first to have
technologically
innovative products

Source: Ipsos Global Influentials 2024, APAC Region

Resurgence of luxury travel

Travel took a steep dive during the pandemic, where there were strict restrictions, but has since rebounded. Luxury travel has exceeded pre-pandemic levels.



India, China, Singapore and Hong Kong Influentials top the list of highest travel spenders

Influentials in APAC, on average, spend **\$20K** on travel annually

Average Annual Travel Spend
(Among those who travel)



Source: Ipsos Global Influentials 2024, APAC Region
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APAC Influentials travel for unique experiences and destinations

59%
travel for spiritual experiences

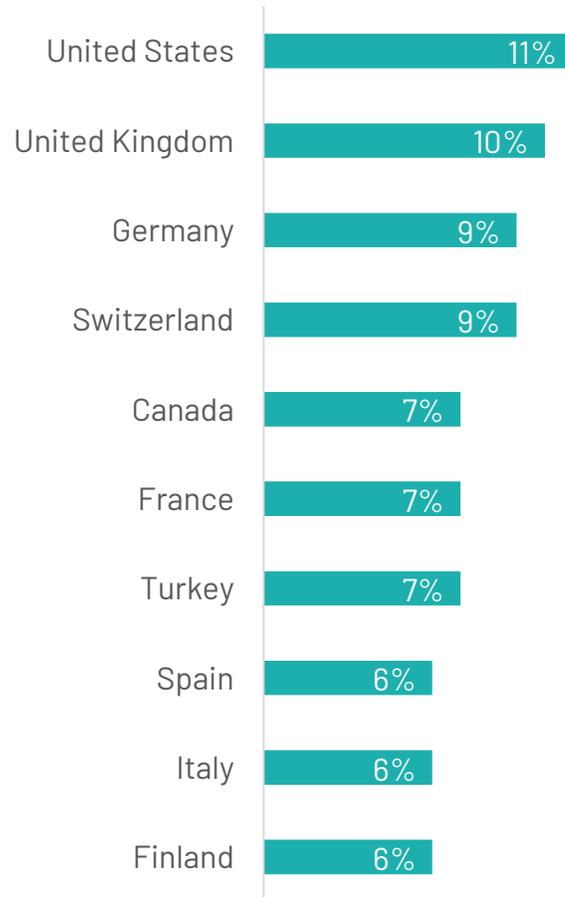


50%
prefer to go places that are off the beaten track

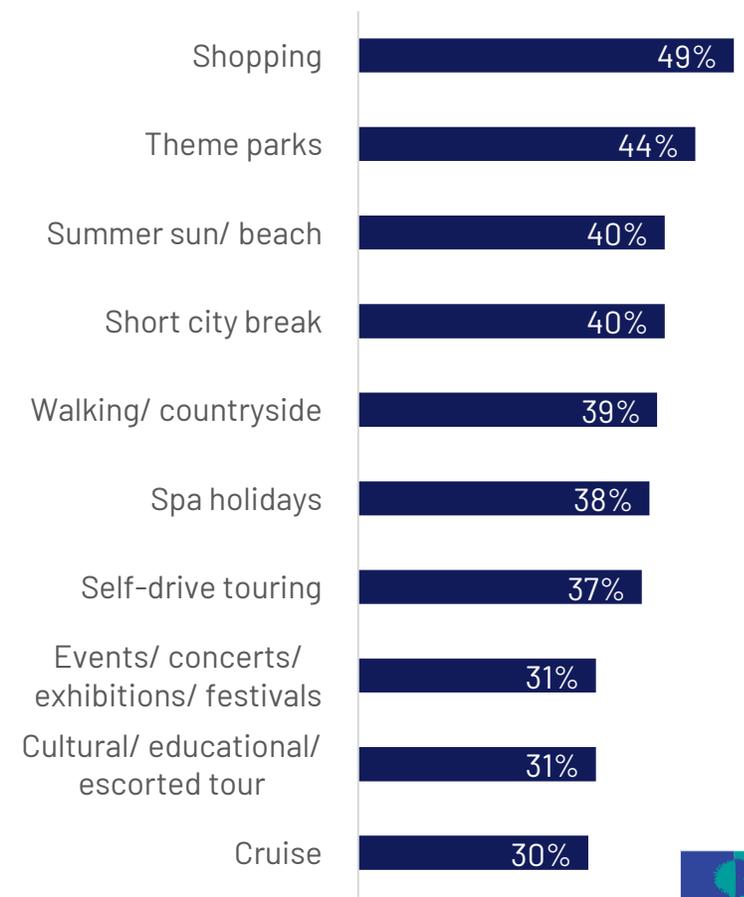
Source: Ipsos Global Influentials 2024, APAC Region

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Top Destinations Expected to Visit (outside of APAC Region)



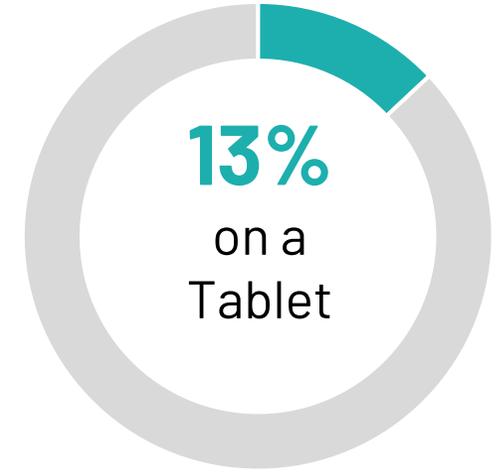
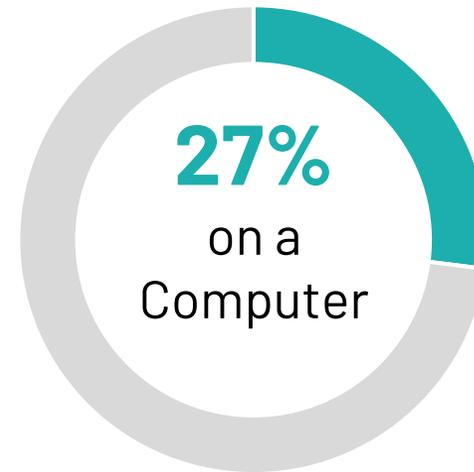
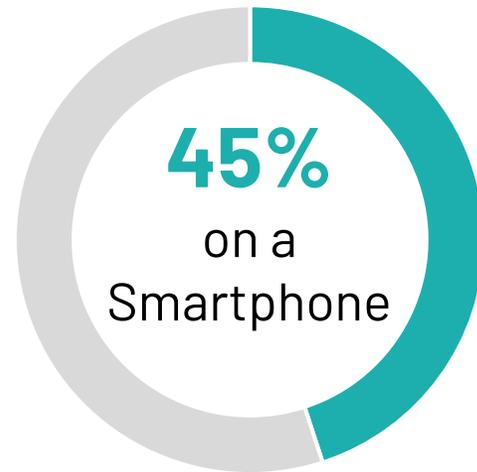
Types of Vacations Interested In



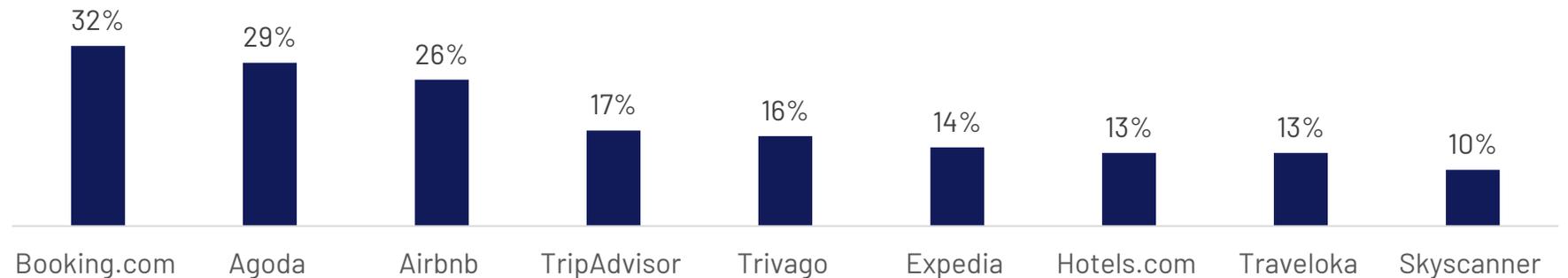
Mobile is the preferred way to book travel

Booking.com and Agoda are popular sites used for travel

Travel bookings are mainly done via digital means. Smartphone is the most popular and convenient way to book a trip.



Online Platforms Used to Book Travel – Past 12 Months

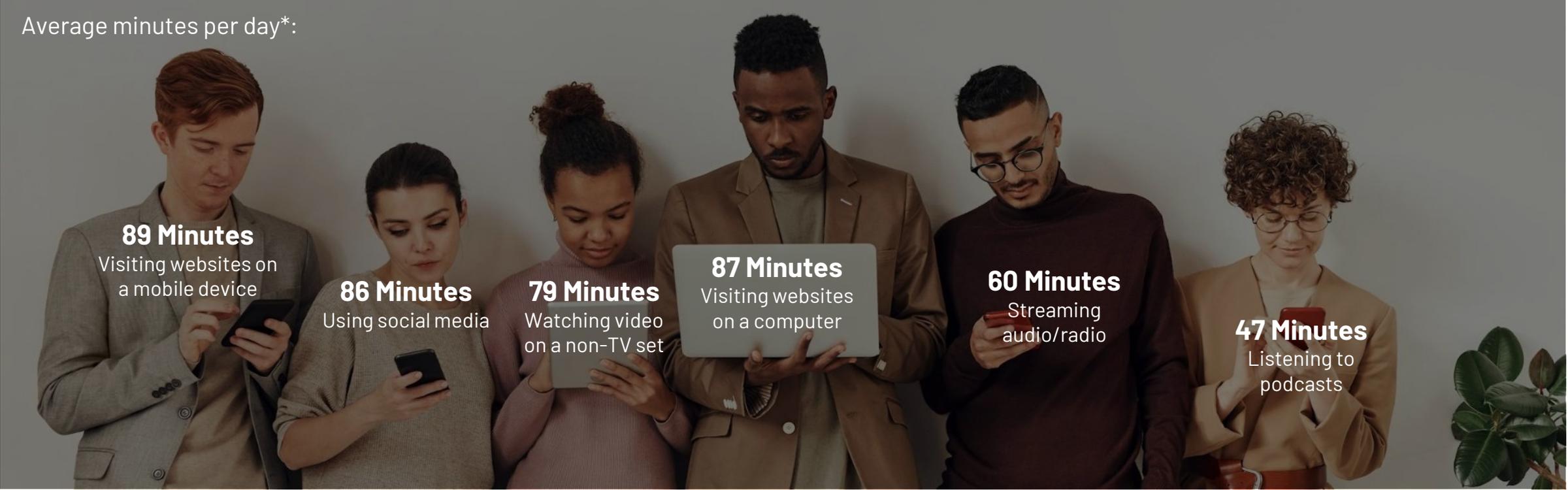


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How to engage with influencers?

Influentials in this region consume media in a variety of ways. Digital and mobile consumption takes up a large portion of their day.

Average minutes per day*:



Traditional Media:


89 Minutes
Watching video on a TV Set


51 Minutes
Listening to radio


37 Minutes
Reading newspapers


34 Minutes
Reading magazines

Source: Ipsos Global Influentials 2024, APAC Region



Reaching APAC Influentials: Growing Power of Digital



TV Viewing: Shifting from TV Sets to Digital

Traditional TV viewership in APAC is lower than the global average, especially in China. Japan and Thailand are exceptions.

This shift necessitates multi-platform strategies.



Mobile-First

Several APAC markets, including Malaysia, the Philippines, Thailand, and particularly Indonesia, demonstrate high engagement with mobile for activities like reading news/magazine content and watching video on devices other than TV sets.

This reinforces the importance of mobile-first strategies for reaching influentials in these markets.



Social Media Engagement

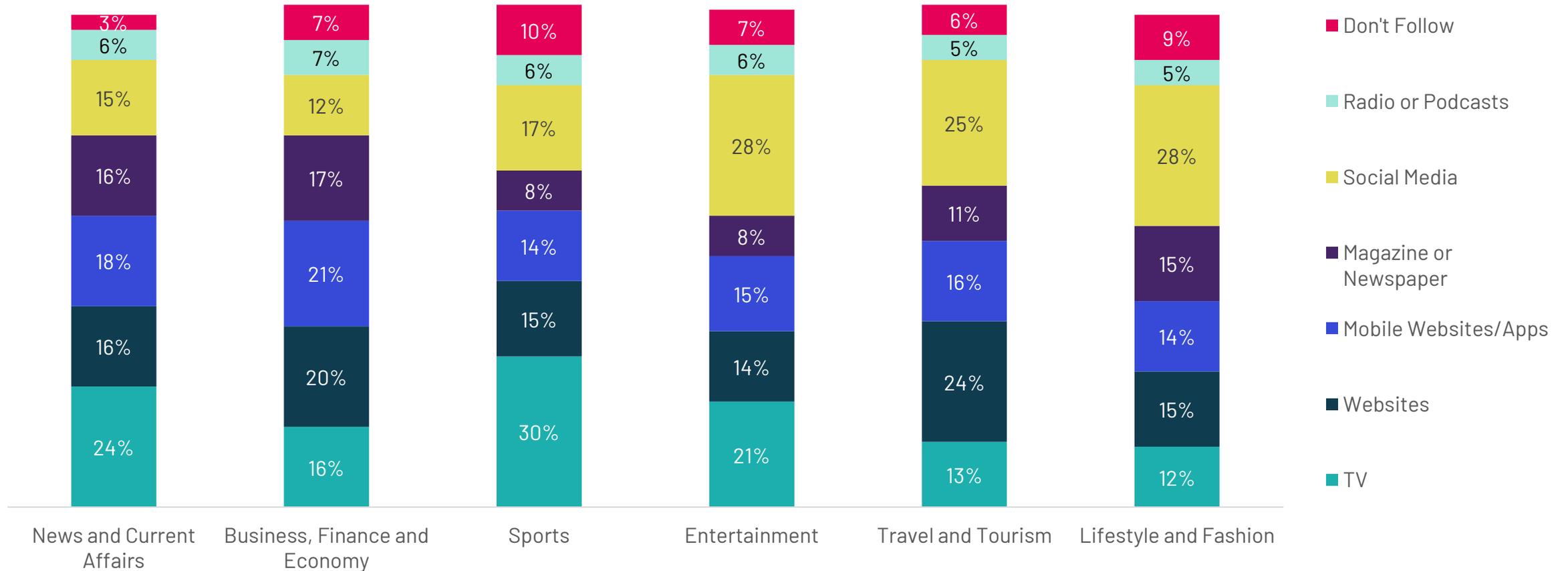
The Philippines, Thailand, and Indonesia stand out with significantly higher social media usage compared to other APAC markets.

This highlights the importance of social media marketing for reaching influentials in these markets.

Conversely, Japan and South Korea show lower social media usage than the APAC average.

TV remains the top source for information on news & sports. Mobile apps/websites are a key source for business/finance. APAC Influentials turn to social media to stay up-to-date with travel, entertainment, lifestyle & fashion.

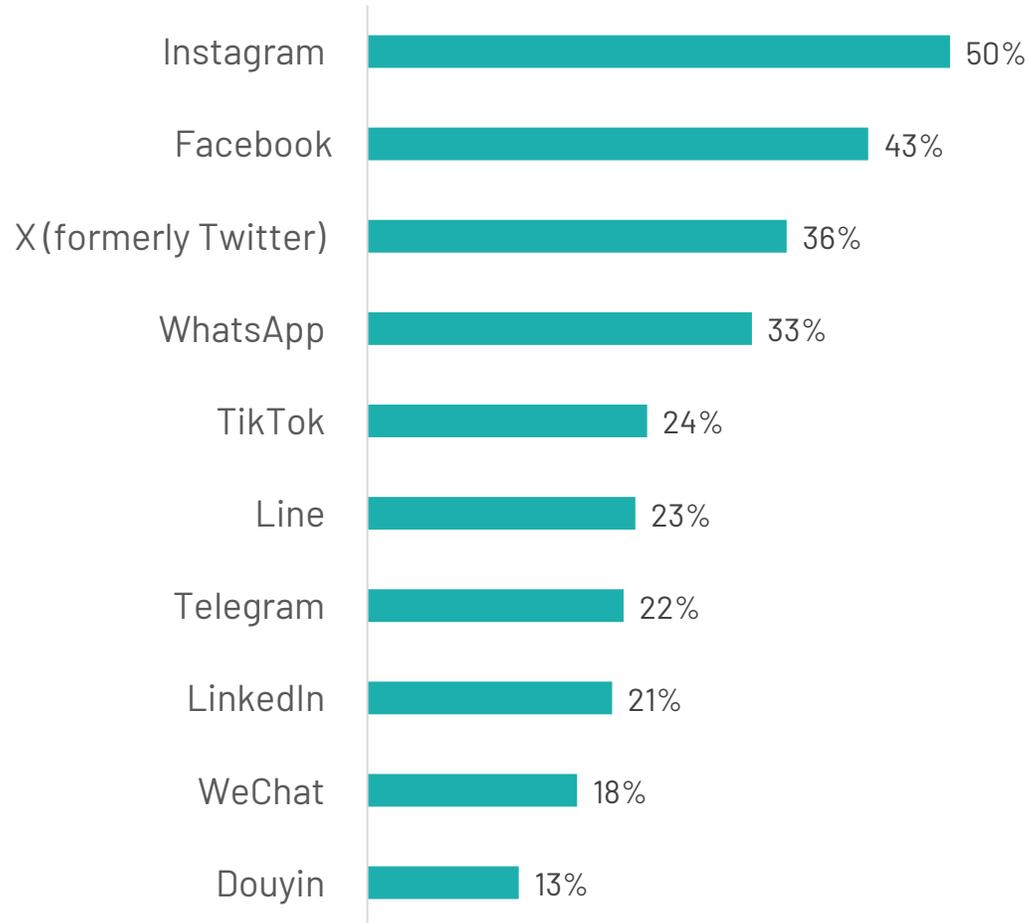
First Source of Information Influentials Turns to:



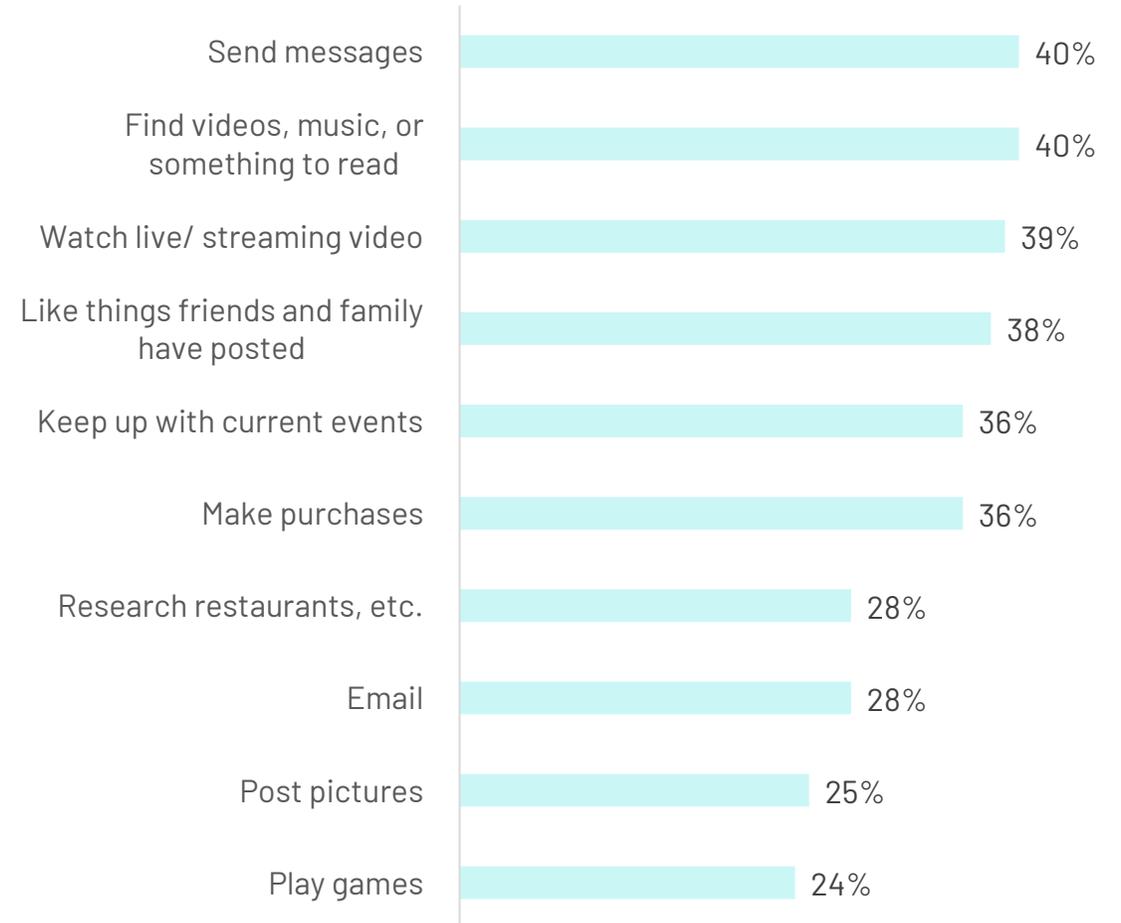
Source: Ipsos Global Influentials 2024, APAC Region

Instagram and Facebook are the leading social networks sites

Social Networks Used – Past 30 Days



Top Social Network Activities



When they are reached via media channels, many of them are open and often very engaged in advertisements they are exposed to

68%

Advertising helps me learn about new products and services that I am unfamiliar with

63%

If an ad looks interesting, I'll click on it

59%

I am open to ads that appear to be based on my online behavior if they are relevant to me

49%

I have more confidence in purchasing products/using services that have been advertised

45%

Products that have great advertising are usually of higher quality

43%

I have bought a product simply because the advertising was so good

UNIQUE BENEFITS OF IGI

How IGI Insights Fuels Strategic
Decision-Making

How brands can use IGI

1

Understand powerful customers: Gain insight into the demographics, lifestyles, media consumption and spending habits of affluent customers

2

Create engaging communication: Develop targeted messaging and relevant value propositions that resonate with Influentials

3

Decode important decisions: Understand the factors that influence the purchasing decisions of this powerful consumer group

THANK YOU

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