



## Bluebell Group launches 2025 Asia Lifestyle Consumer Profile

Survey points to a period of recalibration in luxury perception and shopping behaviour

**May 2025** – Bluebell Group launched today its fifth annual edition of the Asia Lifestyle Consumer Profile, first published in 2021. The report is the result of an Asia-wide consumer survey completed in March 2025, covering 1,500 luxury consumers across Asia — including Mainland China, Hong Kong SAR, South Korea, Japan and Southeast Asia — who have spent a minimum of USD 1,200 on lifestyle products in the previous 6 months.

This year's survey reveals a drop in confidence and a sense of recalibration across the region, with positivity for the future decreasing in China (94%, -3pts), Southeast Asia (90%, -3pts), and Japan (74%, -4pts), and a sharp drop in travel intent among Chinese consumers. Paired with a contrasting rise in spending intent, survey results point to a market in flux—hopeful but volatile, with brands needing to respond to shifting signals rather than rely on past momentum.

“This year's findings reflect a more discerning, digitally connected and value-driven luxury consumer across Asia,” said Ashley Micklewright, President & CEO of Bluebell Group. “Brands can no longer rely on heritage or aspiration alone—they must prove their worth across every touchpoint. Whether it's through quality, relevance, innovation or service, the new luxury equation is about earning trust and loyalty in distinct markets that are both fast-evolving and fundamentally recalibrating.”

### 1. Substance over form: luxury must demonstrate its value to justify its price

As prices rise and access broadens, Asian consumers are becoming more deliberate about their luxury purchases. Across the region, they increasingly expect brands to justify their price tags through product quality and performance, investment value, or resale potential. At the same time, the search for value is beginning to drive demand for dupes, with 75% of Koreans and 64% of Chinese and Southeast Asians open to affordable lookalikes. Together, the data signals a more rationalised luxury mindset, in which brands must work harder to justify their pricing power.

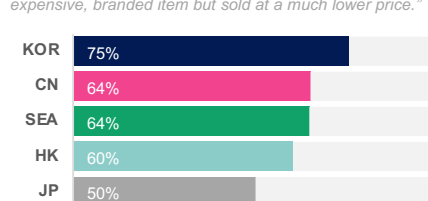
#### Quality over design

*Slightly/Strongly Agree: "Luxury is more about the quality of the material and product, rather than the design or the brand behind the product."*



#### Interest in dupes

*Slightly/Strongly Agree: "I am becoming more interested in dupe (duplicate) products. That is a product similar in appearance, functionality, or design to a higher-end, often more expensive, branded item but sold at a much lower price."*



### 2. Innovation sticks: Home-grown and niche brands raise the bar

Benefitting from this shift in consumption priorities are Asian home-grown and niche brands that deliver innovation with cultural relevance and technological mastery. The data shows a growing preference for brands that are innovative, emotionally resonant and culturally relevant: interest in Asian luxury brands remains high, led by China (86%), Southeast Asia (83%), and Hong Kong (70%). Consumers are also increasingly turning to niche or limited-edition collections over mainstream ones, especially in China (+15pts YoY). While traditional houses remain influential, this shift points to consumer fatigue and a desire for freshness.



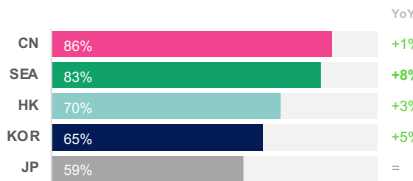
### Asian brands more innovative

Slightly/Strongly Agree: "I feel that local Asian brands, as opposed to Western brands, are stronger in their approach relative to innovation and in responding to and meeting local needs, whether product or service related"



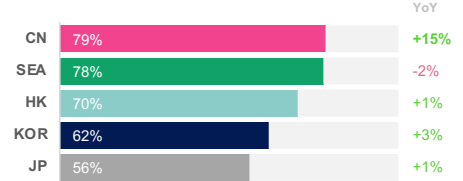
### Interest in Asian brands

Slightly/Strongly Agree: "I intend to buy more and more luxury products from Asian brands as they are usually just as high quality and more accessible than Western brands."



### Niche or limited over mainstream

Slightly/Strongly Agree: "I prefer to buy niche or limited-edition items rather than mainstream collections."

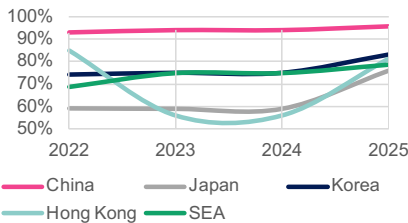


## 3. Invisible and high-touch service: Quality of service must be present in every interaction

Expectations around service continue to rise. High-touch, seamless interactions—online and offline—have become a baseline requirement. From personalised digital journeys to knowledgeable in-store staff, consumers want service that is invisible yet attentive, frictionless yet emotionally resonant. More than 90% of respondents expect perks and rewards when shopping luxury, and many also show interest in immersive or advisory in-store experiences—especially in China and Southeast Asia. This high-touch mindset cuts across categories and channels, suggesting that brands must consistently deliver value in the form of service, from the digital journey, payment options, delivery, physical interaction, and not just product.

### Experiences over products

Slightly/Strongly Agree: "Luxury to me nowadays is less about the product itself, but more about the 'experiences' that a brand can offer me, outside of brand events, but more those that are 'lifestyle' driven and appeal to my interests"



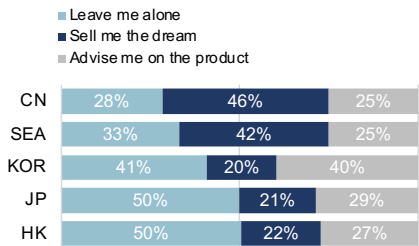
### Expectation of perks

Slightly/Strongly Agree: "I expect to be rewarded by premium/luxury brands when I shop with them - with special perks/ benefits, invitations, access to exclusive or new products etc."



### Preferred in-store service

"When it comes to in-store service, you prefer the sales assistant to..."

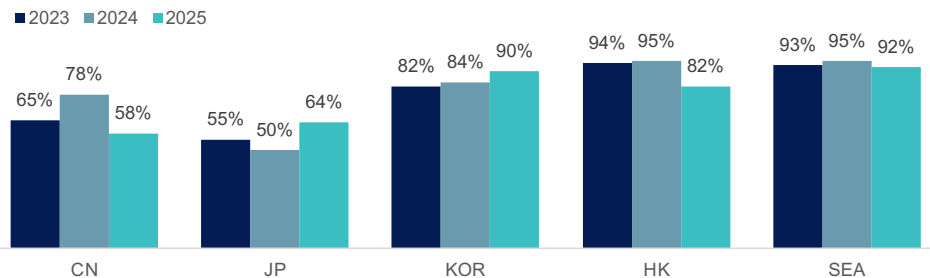


## 4. Shopping on the move: New routes, new travellers

Finally, luxury brands counting on outbound Chinese spend may need to adjust expectations. Just 58% of Chinese respondents say they plan to travel abroad in 2025, down from 78% in 2024, and 65% in 2023. At the same time, international travel intent remains strong in markets like Korea (90%), Hong Kong (82%) and Southeast Asia (92%). Notably, new destinations like Dubai and Sydney have broken into the top 10 most desired locations, pointing to broader shifts in tourism flows and retail opportunities.

### Intent to travel internationally

Respondents planning to travel internationally



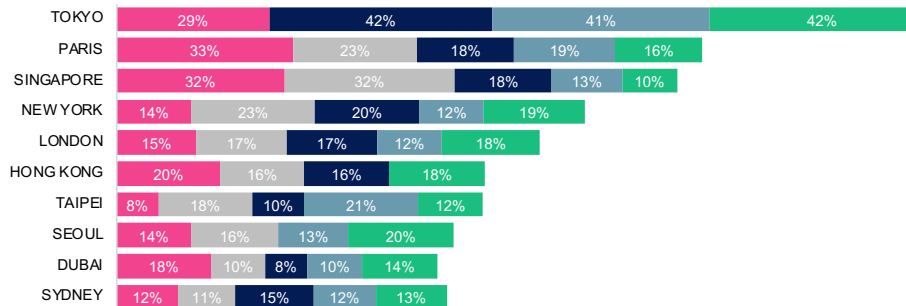


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### Preferred international travel destinations

Aggregate figures of top three destinations to visit

■ CN ■ JP ■ KOR ■ HK ■ SEA



As consumers become more deliberate, discerning and digitally connected, the 2025 report underscores the need for luxury brands to listen closely, adapt locally, and deliver value consistently—not only through product, but through experience, service and storytelling.

To download the full report, please visit <https://www.bluebellgroup.com/market-insights/>.

### About Bluebell Group

Bluebell Group has pioneered building successful brands in Asia since 1954. As Asia’s partner of choice, Bluebell Group is present in Japan, South Korea, Mainland China, Hong Kong SAR, Taiwan, Macau SAR, Singapore, Malaysia and Australia.

The Group’s distribution network includes flagship stores, shop-in-shops, counters, its own multi-brand concepts, as well as a highly selective wholesale network, together with both direct e-commerce and marketplaces, covering both domestic and Travel Retail.

The Group operates across multiple product categories: Accessories, Footwear, Apparel, Fragrance, Beauty, Gourmet, Jewellery, Watches, Eyewear and Tobacco.

A family-owned group, Bluebell Group today has over 3,000 employees, 650 points-of-sale. [www.bluebellgroup.com](http://www.bluebellgroup.com)

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