

# Sustainable Consumption in APAC

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# Introduction

Preserving the planet for future generations is critical. Sustainable consumption will be integral to leading economies around the world reaching their environmental targets, so it is also important to understand consumer attitudes towards sustainable consumption. For the second consecutive year, Rakuten Insight conducted an online survey with over 109,000 consumers from its own proprietary panel across APAC to explore sustainability.

The following insights on sustainable consumption, highlighted by comparisons to the previously conducted survey in 2022, will hopefully help brands to provide more affordable, sustainable products for consumers across Asia.





# Findings

## Shaping the Green Mindset: Unveiling Consumer Values

Sustainable consumption is important to the APAC consumer. This can be demonstrated by the finding that sustainability impacts the consumer decision-making process. **45% of consumers in APAC find it very important that product purchases are sustainably made/packaged or environmentally friendly.** This was an increase from the 2022 survey, up from 43%. The number of those who answered it's not at all important reduced from 4% down to 3%.

Brands need to take note as this preference for sustainably made & packaged products applies across all generations. As may be anticipated, **Gen Z expresses the strongest preference for sustainably packaged products, with 88% finding it either somewhat or very important.** At the other end of the spectrum, Baby Boomers are not far behind at 79%.

## Walking the Talk: Sustainable Practices in Action

Rakuten Insight have previously conducted surveys on sustainable consumption. This year, a very encouraging sign is that the stated importance of sustainability is beginning to translate into real action. **Over 1 in 2 (55%) stated that they have adopted sustainability practices when purchasing products.** An increase from 52% from the 2022 survey.

Once again, **Gen Z (56%) and Millennials (59%) are leading the way in terms of taking action when purchasing products.** This compares favourably to Gen X (48%) and Baby Boomers (36%).

Consistent with previous surveys, the data showed that markets in South East Asia are particularly action-oriented compared to other markets in the region. **Indonesia (68%), Thailand (62%), Philippines & Vietnam (61%) are the highest-ranked markets to state they take action when purchasing products.**

Potentially, this is because these markets are closer to taking the brunt of the impact of climate change compared to some other markets.

Specifically, the actions taken during the purchase process remain consistent with the survey in 2022. **Reduced usage of single-use plastics remains the most stated action at 78%, the same as in 2022.** There has been a slight increase in choosing items with sustainable packaging, rising from 47% in 2022 to 50% in 2023. Recycling has also slightly increased to 40% in 2023, from 38% in 2022.



# Findings

## Breaking Down Barriers

When it comes to the barriers to choosing more sustainable products, **being more expensive is the most stated barrier**, as it was in 2022. As the cost of living crisis continues post-pandemic in many markets, this may explain the increase from 31% in 2022 to 36% in 2023. **The second most stated barrier is not having enough information**, with a similar increase from 30% in 2022 to 35% in 2023.

## Inspiring Change: Propelling Sustainable Lifestyles

Unpacking this barrier in further qualitative work would be an interesting topic as these days, consumers have plenty of information at their disposal. A hypothesis could be that consumers would prefer even easier access to information or have the information stand out from the noise even further.

In this survey, however, **the top two stated measures to adopt more sustainable consumption practices focus on expense (32%) and availability (25%)**, both up slightly from 2022 with 30% and 24%, respectively. This is consistent across all age groups.

Encouragingly, **68% of consumers across all markets are willing to pay more for sustainably produced/packaged and environmentally friendly products**. This is a slight increase from 68% in 2022. Also encouragingly, the most willing consumers to pay more are GenZ (72%) and Millennials (70%). More so than the older age groups, Gen X (59%) and Boomers (48%).

Tax is another interesting area to inspire change. Interestingly, **it is the younger generation who are more open to taxation as a means to tackle sustainable consumption**, with Gen Z (15%) and Millennials (14%) higher than both Gen X (10%) and Boomers (6%). This is an encouraging sign that future politicians will be able to appeal more to the voting public that increasing taxes can be one method to support sustainable consumption.



## About the survey

For this survey, Rakuten Insight Global interviewed 109,780 adults 16+ years old across 11 of our proprietary panels (Hong Kong, India, Indonesia, Japan, Malaysia, Philippines, Singapore, South Korea, Thailand, Taiwan, Vietnam).

### Target

Male and Female, aged 16+

### Markets

 Hong Kong	 Indonesia	 India
 Japan	 South Korea	 Malaysia
 Philippines	 Singapore	 Thailand
 Taiwan	 Vietnam	







# Hong Kong

## Have you adopted any sustainable practices when purchasing items in the last 12 months?



### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	73%	✓ Chose brands/producers with known environmentally sustainable practices and values	18%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	44%	✓ Recycled/upcycled old items I owned	51%
✓ Reduced my online purchases, food delivery & take-aways	29%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	23%
✓ Purchased more seasonal produce	23%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	26%
✓ Reduced my meat/ animal products consumption	22%	✓ Reduced buying new items	28%
✓ Chose organic/sustainably-produced food items	26%	✓ Reduced my purchase of fast-fashion clothing	24%
✓ Bought more locally-made products	22%		

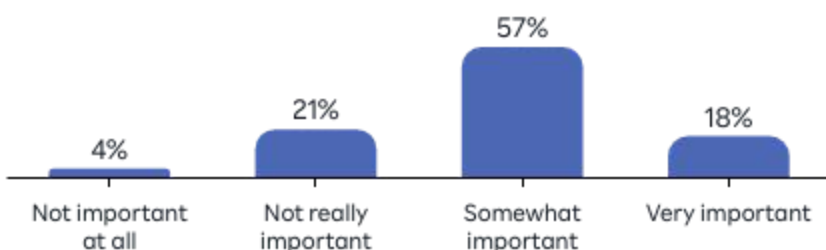
### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	21%
✗ I do not have enough information on hand to make sustainable choices	31%
✗ It is too expensive	44%
✗ It takes too much effort/is too time consuming	20%
✗ It is too inconvenient	30%
✗ It is too complicated	16%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	14%

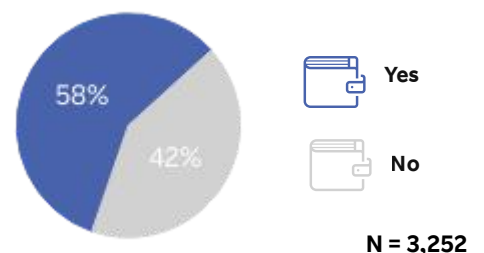
### Encouraging sustainable shifts



### Importance of sustainable product choices



### Williness to pay for sustainability





India

## Have you adopted any sustainable practices when purchasing items in the last 12 months?

**56%**  
Yes

**27%**  
No

**17%**  
Not sure

### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	71%	✓ Chose brands/producers with known environmentally sustainable practices and values	26%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	52%	✓ Recycled/upcycled old items I owned	29%
✓ Reduced my online purchases, food delivery & take-aways	36%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	19%
✓ Purchased more seasonal produce	33%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	32%
✓ Reduced my meat/ animal products consumption	33%	✓ Reduced buying new items	20%
✓ Chose organic/sustainably-produced food items	32%	✓ Reduced my purchase of fast-fashion clothing	17%
✓ Bought more locally-made products	29%		

### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	25%
✗ I do not have enough information on hand to make sustainable choices	36%
✗ It is too expensive	32%
✗ It takes too much effort/is too time consuming	22%
✗ It is too inconvenient	18%
✗ It is too complicated	18%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	17%

### Encouraging sustainable shifts



19%

Additional tax/fees on single-use plastic packaging



30%

Increasing the availability of sustainably-made/ environmentally-friendly products



19%

Make it easier to repair broken or damaged items



20%

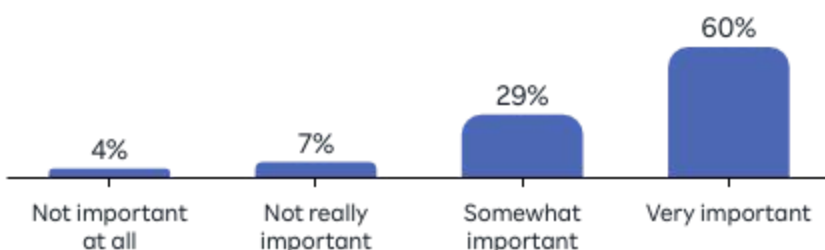
Making sustainable/ environmentally-friendly products more affordable



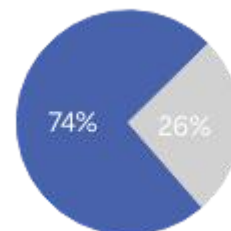
12%

More information on how to recycle and increase availability of recycling points

### Importance of sustainable product choices



### Williness to pay for sustainability



Yes  
No

N = 29,898



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# Indonesia

## Have you adopted any sustainable practices when purchasing items in the last 12 months?

**68%**  
Yes

**10%**  
No

**22%**  
Not sure

### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	84%	✓ Chose brands/producers with known environmentally sustainable practices and values	19%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	54%	✓ Recycled/upcycled old items I owned	31%
✓ Reduced my online purchases, food delivery & take-aways	18%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	10%
✓ Purchased more seasonal produce	10%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	34%
✓ Reduced my meat/ animal products consumption	13%	✓ Reduced buying new items	23%
✓ Chose organic/sustainably-produced food items	26%	✓ Reduced my purchase of fast-fashion clothing	24%
✓ Bought more locally-made products	31%		

### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	16%
✗ I do not have enough information on hand to make sustainable choices	40%
✗ It is too expensive	31%
✗ It takes too much effort/is too time consuming	25%
✗ It is too inconvenient	25%
✗ It is too complicated	21%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	44%

### Encouraging sustainable shifts



12%

Additional tax/fees on single-use plastic packaging



29%

Increasing the availability of sustainably-made/ environmentally-friendly products



9%

Make it easier to repair broken or damaged items



39%

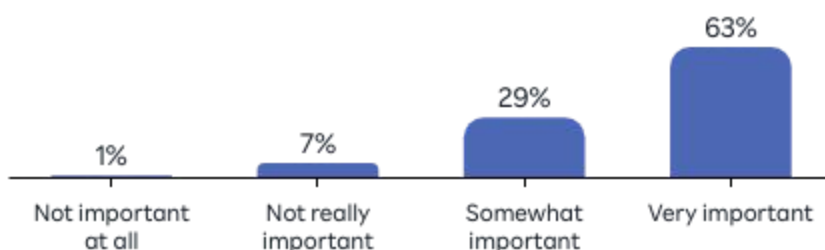
Making sustainable/ environmentally-friendly products more affordable



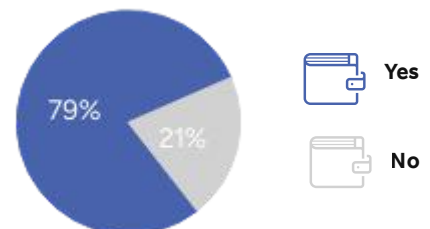
11%

More information on how to recycle and increase availability of recycling points

### Importance of sustainable product choices



### Willingness to pay for sustainability



N = 11,099



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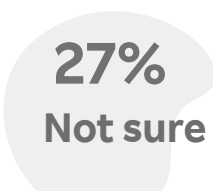


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## Have you adopted any sustainable practices when purchasing items in the last 12 months?



### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	73%	✓ Chose brands/producers with known environmentally sustainable practices and values	27%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	52%	✓ Recycled/upcycled old items I owned	36%
✓ Reduced my online purchases, food delivery & take-aways	13%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	21%
✓ Purchased more seasonal produce	44%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	32%
✓ Reduced my meat/ animal products consumption	3%	✓ Reduced buying new items	31%
✓ Chose organic/sustainably-produced food items	15%	✓ Reduced my purchase of fast-fashion clothing	12%
✓ Bought more locally-made products	51%		

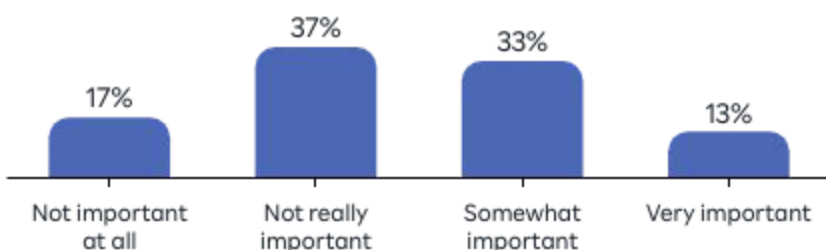
### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	47%
✗ I do not have enough information on hand to make sustainable choices	11%
✗ It is too expensive	16%
✗ It takes too much effort/is too time consuming	13%
✗ It is too inconvenient	4%
✗ It is too complicated	6%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	5%

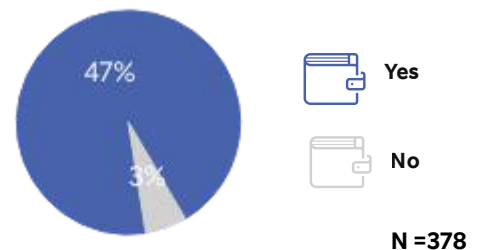
### Encouraging sustainable shifts



### Importance of sustainable product choices



### Williness to pay for sustainability





# South Korea

## Have you adopted any sustainable practices when purchasing items in the last 12 months?



### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	75%	✓ Chose brands/producers with known environmentally sustainable practices and values	23%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	41%	✓ Recycled/upcycled old items I owned	26%
✓ Reduced my online purchases, food delivery & take-aways	33%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	18%
✓ Purchased more seasonal produce	35%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	25%
✓ Reduced my meat/ animal products consumption	17%	✓ Reduced buying new items	22%
✓ Chose organic/sustainably-produced food items	23%	✓ Reduced my purchase of fast-fashion clothing	14%
✓ Bought more locally-made products	20%		

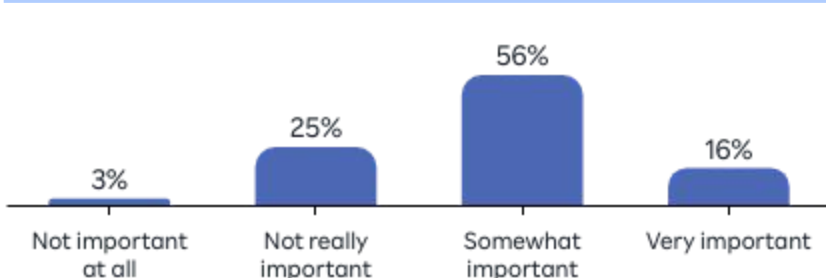
### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	16%
✗ I do not have enough information on hand to make sustainable choices	26%
✗ It is too expensive	46%
✗ It takes too much effort/is too time consuming	23%
✗ It is too inconvenient	17%
✗ It is too complicated	12%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	9%

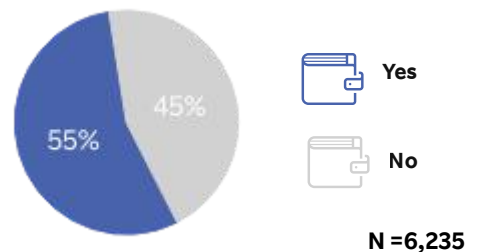
### Encouraging sustainable shifts



### Importance of sustainable product choices



### Williness to pay for sustainability





# Malaysia

## Have you adopted any sustainable practices when purchasing items in the last 12 months?

**47%**  
Yes

**28%**  
No

**25%**  
Not sure

### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	79%	✓ Chose brands/producers with known environmentally sustainable practices and values	25%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	46%	✓ Recycled/upcycled old items I owned	50%
✓ Reduced my online purchases, food delivery & take-aways	32%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	19%
✓ Purchased more seasonal produce	16%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	35%
✓ Reduced my meat/ animal products consumption	18%	✓ Reduced buying new items	31%
✓ Chose organic/sustainably-produced food items	22%	✓ Reduced my purchase of fast-fashion clothing	24%
✓ Bought more locally-made products	38%		

### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	23%
✗ I do not have enough information on hand to make sustainable choices	39%
✗ It is too expensive	42%
✗ It takes too much effort/is too time consuming	24%
✗ It is too inconvenient	17%
✗ It is too complicated	21%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	24%

### Encouraging sustainable shifts



11%

Additional tax/fees on single-use plastic packaging



24%

Increasing the availability of sustainably-made/ environmentally-friendly products



18%

Make it easier to repair broken or damaged items



33%

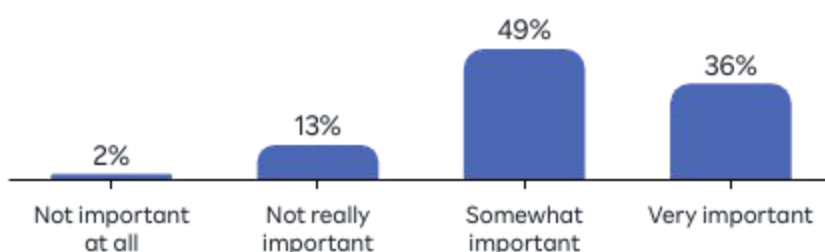
Making sustainable/ environmentally-friendly products more affordable



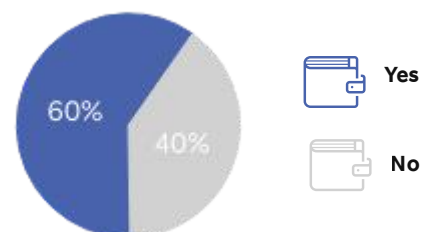
14%

More information on how to recycle and increase availability of recycling points

### Importance of sustainable product choices



### Williness to pay for sustainability



N = 10,477



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# Philippines

## Have you adopted any sustainable practices when purchasing items in the last 12 months?

**61%**  
Yes

**19%**  
No

**20%**  
Not sure

### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	77%	✓ Chose brands/producers with known environmentally sustainable practices and values	29%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	55%	✓ Recycled/upcycled old items I owned	46%
✓ Reduced my online purchases, food delivery & take-aways	35%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	19%
✓ Purchased more seasonal produce	18%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	36%
✓ Reduced my meat/ animal products consumption	21%	✓ Reduced buying new items	31%
✓ Chose organic/sustainably-produced food items	32%	✓ Reduced my purchase of fast-fashion clothing	22%
✓ Bought more locally-made products	39%		

### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	24%
✗ I do not have enough information on hand to make sustainable choices	42%
✗ It is too expensive	41%
✗ It takes too much effort/is too time consuming	19%
✗ It is too inconvenient	13%
✗ It is too complicated	14%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	22%

### Encouraging sustainable shifts



8%

Additional tax/fees on single-use plastic packaging



32%

Increasing the availability of sustainably-made/ environmentally-friendly products



13%

Make it easier to repair broken or damaged items



32%

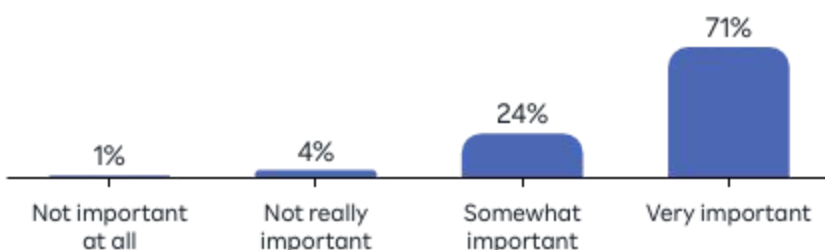
Making sustainable/ environmentally-friendly products more affordable



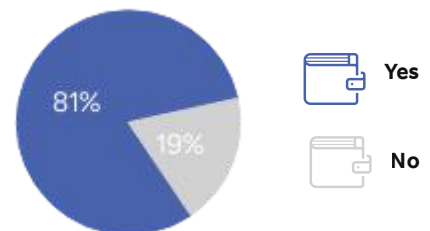
15%

More information on how to recycle and increase availability of recycling points

### Importance of sustainable product choices



### Williness to pay for sustainability



N = 10,944





# Singapore

## Have you adopted any sustainable practices when purchasing items in the last 12 months?



### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	85%	✓ Chose brands/producers with known environmentally sustainable practices and values	19%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	39%	✓ Recycled/upcycled old items I owned	57%
✓ Reduced my online purchases, food delivery & take-aways	33%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	19%
✓ Purchased more seasonal produce	14%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	28%
✓ Reduced my meat/ animal products consumption	18%	✓ Reduced buying new items	39%
✓ Chose organic/sustainably-produced food items	13%	✓ Reduced my purchase of fast-fashion clothing	27%
✓ Bought more locally-made products	28%		

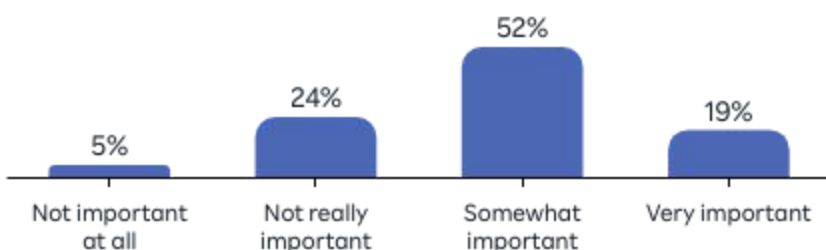
### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	25%
✗ I do not have enough information on hand to make sustainable choices	29%
✗ It is too expensive	42%
✗ It takes too much effort/is too time consuming	30%
✗ It is too inconvenient	27%
✗ It is too complicated	17%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	16%

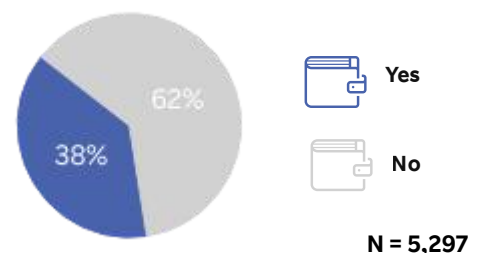
### Encouraging sustainable shifts



### Importance of sustainable product choices



### Williness to pay for sustainability





# Thailand

## Have you adopted any sustainable practices when purchasing items in the last 12 months?

**62%**  
Yes

**13%**  
No

**25%**  
Not sure

### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	79%	✓ Chose brands/producers with known environmentally sustainable practices and values	24%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	50%	✓ Recycled/upcycled old items I owned	45%
✓ Reduced my online purchases, food delivery & take-aways	26%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	25%
✓ Purchased more seasonal produce	27%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	38%
✓ Reduced my meat/ animal products consumption	14%	✓ Reduced buying new items	32%
✓ Chose organic/sustainably-produced food items	23%	✓ Reduced my purchase of fast-fashion clothing	27%
✓ Bought more locally-made products	28%		

### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	21%
✗ I do not have enough information on hand to make sustainable choices	36%
✗ It is too expensive	36%
✗ It takes too much effort/is too time consuming	15%
✗ It is too inconvenient	21%
✗ It is too complicated	18%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	19%

### Encouraging sustainable shifts



17%

Additional tax/fees on single-use plastic packaging



18%

Increasing the availability of sustainably-made/ environmentally-friendly products



20%

Make it easier to repair broken or damaged items



36%

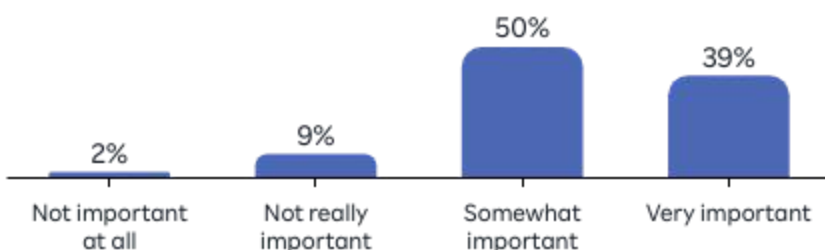
Making sustainable/ environmentally-friendly products more affordable



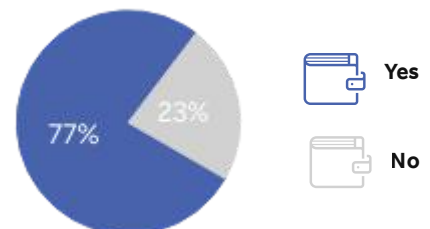
10%

More information on how to recycle and increase availability of recycling points

### Importance of sustainable product choices



### Williness to pay for sustainability



N = 16,838







# Taiwan

## Have you adopted any sustainable practices when purchasing items in the last 12 months?

**59%**  
Yes

**15%**  
No

**26%**  
Not sure

### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	91%	✓ Chose brands/producers with known environmentally sustainable practices and values	18%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	51%	✓ Recycled/upcycled old items I owned	45%
✓ Reduced my online purchases, food delivery & take-aways	20%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	24%
✓ Purchased more seasonal produce	34%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	32%
✓ Reduced my meat/ animal products consumption	13%	✓ Reduced buying new items	26%
✓ Chose organic/sustainably-produced food items	26%	✓ Reduced my purchase of fast-fashion clothing	26%
✓ Bought more locally-made products	29%		

### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	27%
✗ I do not have enough information on hand to make sustainable choices	38%
✗ It is too expensive	34%
✗ It takes too much effort/is too time consuming	22%
✗ It is too inconvenient	29%
✗ It is too complicated	16%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	12%

### Encouraging sustainable shifts



10%

Additional tax/fees on single-use plastic packaging



19%

Increasing the availability of sustainably-made/ environmentally-friendly products



24%

Make it easier to repair broken or damaged items



39%

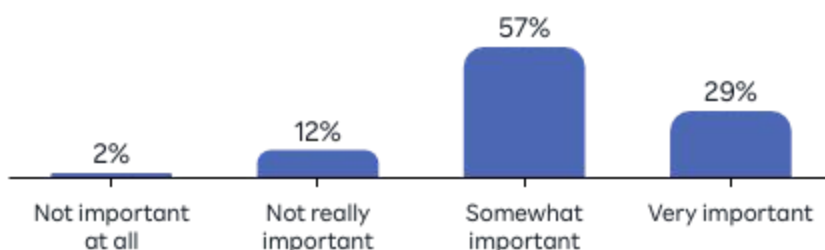
Making sustainable/ environmentally-friendly products more affordable



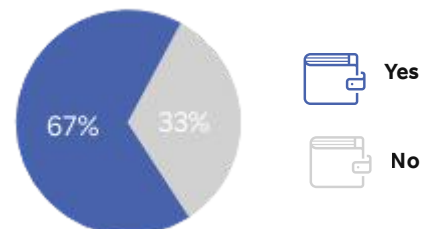
8%

More information on how to recycle and increase availability of recycling points

### Importance of sustainable product choices



### Williness to pay for sustainability



N = 11,917



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## Vietnam

## Have you adopted any sustainable practices when purchasing items in the last 12 months?

**61%**  
Yes

**26%**  
No

**13%**  
Not sure

### Adoption of sustainable practices

✓ Reduced my use of single-use plastic	72%	✓ Chose brands/producers with known environmentally sustainable practices and values	30%
✓ Chose items in sustainable packaging/reduced my purchases of items packaged in plastic	50%	✓ Recycled/upcycled old items I owned	36%
✓ Reduced my online purchases, food delivery & take-aways	31%	✓ Bought more second-hand goods/ swapped or exchanged items with friends	20%
✓ Purchased more seasonal produce	31%	✓ Repaired broken items instead of throwing them away and buying new ones (e.g. repairable electrical appliances, mending items of clothing, etc)	36%
✓ Reduced my meat/ animal products consumption	27%	✓ Reduced buying new items	17%
✓ Chose organic/sustainably-produced food items	33%	✓ Reduced my purchase of fast-fashion clothing	18%
✓ Bought more locally-made products	30%		

### Barriers to sustainable practices

✗ I do not believe it makes a difference/ is necessary	27%
✗ I do not have enough information on hand to make sustainable choices	42%
✗ It is too expensive	34%
✗ It takes too much effort/is too time consuming	23%
✗ It is too inconvenient	14%
✗ It is too complicated	19%
✗ It is difficult to get sustainable/environmentally-friendly products in my area	22%

### Encouraging sustainable shifts



15%

Additional tax/fees on single-use plastic packaging



21%

Increasing the availability of sustainably-made/ environmentally-friendly products



27%

Make it easier to repair broken or damaged items



30%

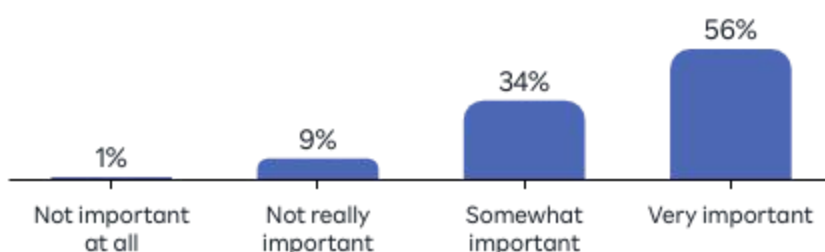
Making sustainable/ environmentally-friendly products more affordable



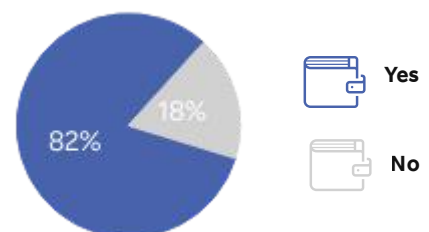
7%

More information on how to recycle and increase availability of recycling points

### Importance of sustainable product choices



### Williness to pay for sustainability



N = 3,445



# Conclusion

In conclusion, the signs are encouraging for the future of sustainable consumption.

Firstly, even in just one year, the percentage of consumers who state very important that product purchases are sustainably made/packaged or environmentally friendly has increased.

Secondly, the number of consumers who are taking action by adopting sustainability practices when purchasing products has increased.

And finally, the younger generations are more willing to pay extra and more open to actions like increased taxes to promote sustainable consumption than the older generations. Rakuten Insight looks forward to seeing another year of positive trends in next year's sustainable consumption survey.





# About Rakuten Insight Global

For over 25 years, Rakuten Insight Global has been at the forefront of consumer market research data collection. By combining our 1st party data with the highest levels of quality assurance processes, Rakuten Insight Global has remained our clients' trusted research partner for Asia, US & Beyond.

Our proprietary online panels have been developed throughout 12 major Asian markets & the US. All of the panels are managed by dedicated local support teams and meet the highest industry standards. The Rakuten Insight Global team offers 24-hour coverage from 11 worldwide locations, providing exceptional service for 500+ clients across the globe.

Rakuten Insight Global is tasked with leveraging the 1st party membership assets of Rakuten Group for market research purposes. Having access to such a diverse and unique group of research participants allows Rakuten Insight to remain at the forefront of online research.

# Rakuten Insight



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