Why Should I be Concerned about YWN?
The Urge to Understand Millennials
The Millennial Survey 2014
Big demands and high expectations

Deloitte's third annual Millennial Survey explored what Generation Y wants from Business, Government, and the future workplace. The results revealed that Generation Y wants to work for organizations that foster innovative thinking, develop their skills, and make a positive contribution to society. Join the conversation at #DeloitteDavosLive and #MillennialSurvey.
Do You Remember This?
YWN, not only huge in number but also huge in purchasing power

34.5% of Indonesia citizens are youth

49.7% of Indonesia citizens are female

33% of Indonesia citizens are connected to the internet

A generation of TRENDSERVER to whom other generations are looking at
1. YWN are Everywhere: Not Just our Customers, they’re also our Employees

NOW 2010

- Women: 49.7%
- Youth: 34.5%

LATER 2030

- Women: 28.5%
- Youth: 17.5%

Total: 237 mio

Total: 296 mio

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
2. YWN Getting More Connected: The internet users are growing exponentially

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
3. YWN are Fast in Accommodating Changes
Science-Technology: High adoption of new technologies

Line has 30 million users in Indonesia, now 2nd biggest market

September 12, 2014 | at 7:19 pm | by Lina Novilandari Follow @ritinoviland | 687 followers

Today Japan-based messaging app Line announced its breakdown of registered user numbers in its top countries. It reveals there are now 30 million registered Line users in Indonesia. That’s an increase of 10 million from the country-specific number for April.

Indonesia is now Line’s second biggest country outside of its native Japan.

Source: http://www.techinasia.com/line-registered-users-indonesia-30-million/
A Bubble Generation: The Millennials, Generation X, and Historical Amnesia

In Indonesia, the expansion and subsequent collapse of the Thai currency in 1997, left a new middle class responding to this crisis by pooling resources, sharing access to media, and, in some instances, turning themselves into creative young entrepreneurs. Anthropologist Brent Luvaas reveals that those young people whose tastes ran more toward punk, hardcore and metal, "started making their own stuff, launching their own skate and punk-influenced clothing lines, founding their own magazines and record labels [and] forging an archipelago-wide network of bands and brands modeled [on] the imported alienation of America's Generation X." In other words, this group literally marketed alternative designs and expressions that were often as critical as they were consumerist, rebellious in their ability to innovate, reach out, and take self-initiative to such a degree that Luvaas crowned the Indonesian "Xers" "Generation DIY."

Source: http://www.huffingtonpost.com/christine-henseler/a-bubble-generation-the-millenials_b_5691564.html
Political-Legal: Active participation in politics

Forum Relawan Jokowi
Community

Timeline  About  Photos  Likes  Events

9,255 likes

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About

Forum Relawan Jokowi atau dapat disingkat menjadi ForJokowi adalah wadah bagi para pendukung Jokowi sampai Jokowi menjadi Capres Indonesia 2014 dan menang.

Post  Photo / Video

Write something on this Page...

Forum Relawan Jokowi shared Joko Widodo's photo.
16 September

Karena prinsip demokrasi yang sesungguhnya adalah dari rakyat, untuk rakyat, dan oleh rakyat. Sehingga pemerintah seharusnya lebih mendengar suara rakyat.
## Industry-Market: Indonesia’s B2C e-commerce growth surpasses global average


<table>
<thead>
<tr>
<th>Region</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
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<td>5%</td>
<td>4.20%</td>
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<tr>
<td>Japan</td>
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<td>13.20%</td>
<td>-7.20%</td>
<td>7.10%</td>
<td>6.70%</td>
<td>5.60%</td>
<td>5%</td>
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Video: Apology – Texting vs Talking
What Should I Know about YWN?
## YWN Research 2010 - 2014

### Cities

<table>
<thead>
<tr>
<th>Year</th>
<th>Cities</th>
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<tbody>
<tr>
<td>2010</td>
<td>Jakarta, Bandung, Semarang, Surabaya, Medan, Palembang, Pekanbaru, Denpasar, Makassar, Banjarmasin</td>
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<tr>
<td>2011</td>
<td>Jakarta, Bandung, Semarang, Surabaya, Medan, Palembang, Pekanbaru, Denpasar, Makassar, Banjarmasin</td>
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<tr>
<td>2013</td>
<td>Jakarta, Bandung, Semarang, Solo, Yogyakarta, Surabaya, Banda Aceh, Medan, Padang, Palembang, Pekanbaru, Denpasar, Manado, Makassar, Balikpapan, Pontianak, Banjarmasin, Papua</td>
</tr>
</tbody>
</table>

### Respondent’s criteria

- Household monthly spending above IDR 1,000,000
- Youth: 15 - 35 years old
- Women: 15 - 49 years old
- Netizen: 15 - 59 years old, accessing internet for more than 3 hours per day

### Research Methodology

- Face to Face interview & Focus Group Discussion

### Number of respondents

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of respondents</th>
</tr>
</thead>
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<td>1300</td>
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<tr>
<td>2011</td>
<td>2150</td>
</tr>
<tr>
<td>2012</td>
<td>2150</td>
</tr>
<tr>
<td>2013</td>
<td>2150</td>
</tr>
<tr>
<td>2014</td>
<td>Youth: 12,652, Women: 9,823, Netizen: 3,642</td>
</tr>
</tbody>
</table>
YWN Anxieties & Desires

**Youth**
- Values: Naïve and Idealist
- Desires: To be Established and Powerful
- Anxieties: Being Unsuccessful

**Women**
- Values: Multiple-roles
- Desires: To be Fruitful and Loveable
- Anxieties: Being ‘Alone’

**Netizen**
- Values: Open-minded
- Desires: To be Productive and Limitless
- Anxieties: To be Left Behind

1. To be Faster, Better and Easier
2. To be more Androgynous
3. To work Smarter than Harder
1. Faster, Better, Easier

They don’t like to be ordered, they would prefer to own a **relaxed type of business**

“I don’t like to be ordered around just to make some money. When people are busy finding a job, I just make one of my own, I can be working on it in a more relaxed manner. Like right now, I have my own Bantam farm.” (Youth)

They wants **better condition**

They wants everything runs **so fast!**

“I really like traveling. On the internet, I can do internet banking and also book airline tickets online, so I don’t have to bother with calling a travel agent. It’s all just a matter of clicks, faster and way more practical.” (Netizen)

“I realized that many people have sacrificed in order for me to have my own business. That’s why I think we have to really take steps to make it better and better. I have worked in a conventional job once and I saw my supervisor who worked for 20 years and still stayed at the same position. I don’t want to be like that! I want to see real results in the next 15 years, I work really hard now for my life to get better.” (Women)
2. Androgynous

“Actually my parents didn’t allow me to do my own business. That made me just a bit rebellious. But in the end, I am very proud of what I have achieved.” (Youth)

“I stay connected with my workers via Facebook, Twitter or follow their BBM status.. You might think it is trivial but actually it is very effective. Most male and female nowadays want to get attention in the social media...” (Netizen)

“So far, in caring and educating children, my husband and I have shared the responsibility. I can’t handle it myself, I don’t have that much patience with feeding, showering.. Sometimes my husband bathes my child himself.” (Women)
3. Smarter rather than Harder

"If I can make a query via social media, why should I go to the bank?!" (Youth)

"I quit my job and built a rental house, I'm sure that this business will be profitable, no matter what. We just act as a foreman and monitor the business.." (Women)

"Internet sure is making my life easier. Say I don't want to go to mall. What I need can all be found on the internet. Transfer the money and it'll be at your doorstep the next day. Can be sooner as well if you asked." (Netizen).

Why complicate things, when you can make them easier.
Youth’s Spending Allocation

Spending Allocation (%)
Base: All Youth Respondents (n=12,652)

- Daily needs: 63.7%
- Lifestyle: 27.2%
- Investment: 9.0%

Spending Allocation – by Gender (%)
Base: All Married Youth Respondents

- Male (n=6,286):
  - Daily needs: 64.0%
  - Lifestyle: 27.4%

- Female (n=6,366):
  - Daily needs: 63.5%
  - Lifestyle: 27.1%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
## Youth’s Planned Spending

### Daily Needs Spending (%)
Base: All Youth Respondents  (n=12,652)

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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</thead>
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<td>Food &amp; Beverages</td>
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<tr>
<td>Monthly Bill</td>
<td>41.5</td>
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<tr>
<td>Transportation</td>
<td>33.1</td>
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<tr>
<td>Communication Cost</td>
<td>28.1</td>
</tr>
<tr>
<td>Credit Card Bills</td>
<td>17.2</td>
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<tr>
<td>Health Cost</td>
<td>14.6</td>
</tr>
<tr>
<td>Internet Cost</td>
<td>10.0</td>
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</table>

### Lifestyle Spending (%)
Base: All Youth Respondents  (n=12,652)

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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</thead>
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<tr>
<td>Fashion</td>
<td>52.6</td>
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<tr>
<td>Social</td>
<td>31.4</td>
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<tr>
<td>Recreation</td>
<td>22.0</td>
</tr>
<tr>
<td>Gadget</td>
<td>20.1</td>
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<tr>
<td>Sport</td>
<td>17.3</td>
</tr>
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<td>Hang Out</td>
<td>14.1</td>
</tr>
<tr>
<td>Book</td>
<td>1.1</td>
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</table>

### Investment (%)
Base: All Youth Respondents  (n=12,652)

<table>
<thead>
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<th>Category</th>
<th>Percentage</th>
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<td>Savings</td>
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<tr>
<td>Insurance</td>
<td>6.3</td>
</tr>
<tr>
<td>Jewellery</td>
<td>0.5</td>
</tr>
<tr>
<td>Education</td>
<td>0.3</td>
</tr>
<tr>
<td>Land</td>
<td>0.2</td>
</tr>
<tr>
<td>Gold</td>
<td>0.1</td>
</tr>
</tbody>
</table>

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Question 1:

How big is the portion of Indonesian Women who care about investment?

Only 1 out of 2 Indonesian Women care about investment
**Women’s Spending Allocation**

**Spending Allocation (%)**
Base: All Women Respondents (n=9,823)

- Daily needs: 64.2%
- Lifestyle: 26.0%
- Investment: 9.8%

**Spending Habit – Marital Status (%)**
Base: All Women Respondents

- Single (n=3,553):
  - Daily needs: 63.4%
  - Lifestyle: 28.6%
  - Investment: 8.1%

- Married (n=6,270):
  - Daily needs: 64.6%
  - Lifestyle: 24.5%
  - Investment: 10.8%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Spending Habit – Bandung (\%)  
Base: All Respondents

<table>
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<tr>
<th>Category</th>
<th>Daily Food &amp; Beverages</th>
<th>Transportation</th>
<th>Communication Cost</th>
<th>Internet Cost</th>
<th>Health Cost</th>
<th>Monthly Bill</th>
<th>Monthly Installment</th>
<th>Others</th>
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<td>15.4</td>
<td>12.5</td>
<td>12.3</td>
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<td>5.9</td>
<td>9.5</td>
<td>1.2</td>
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<td>Fashion</td>
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<tr>
<td>Gadget</td>
<td>14.0</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Hang out</td>
<td>14.4</td>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Recreation</td>
<td>14.6</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Social</td>
<td>10.7</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>Others</td>
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</table>

Women Spending Habit - Bandung

Spending Habit - Bandung (\%)

Daily needs  Lifestyle  Investment

Fashion  Gadget  Hang out  Recreation  Social  Others

BANDUNG (n=459)
**Women’s Expenses Allocation**

**Daily Needs (%)**
Base: All Women Respondents (n=9,823)

- Food & Beverages: 65.9%
- Monthly Bill: 45.4%
- Transportation: 32.7%
- Communication Cost: 27.7%
- Monthly Investment: 18.9%
- Health Cost: 15.3%
- Internet Cost: 8.2%

**Lifestyle (%)**
Base: All Women Respondents (n=9,823)

- Fashion: 51.6%
- Social: 38.8%
- Recreation: 21.5%
- Gadget: 18.0%
- Sport: 15.8%
- Hang Out: 12.3%
- Book: 1.2%

**Investment (%)**
Base: All Women Respondents (n=9,823)

- None: 55.4%
- Saving: 41.1%
- Insurance: 7.7%
- Jewellery: 0.5%
- Education: 0.3%
- Land: 0.2%
- Gold: 0.2%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Netizens’ Spending Allocation

Spending Allocation (%)
Base: All Netizen Respondents (n=3,642)

- Daily needs: 62.8%
- Lifestyle: 27.3%
- Investment: 9.9%

Spending Allocation – by Gender (%)
Base: All Respondents

- Male (n=1,926): Daily needs: 63.0%, Lifestyle: 27.2%, Investment: 9.8%
- Female (n=1,716): Daily needs: 62.5%, Lifestyle: 27.4%, Investment: 10.1%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
# Netizens’ Spending Allocation

### Daily Needs (%)
Base: All Netizen Respondents (n=3,642)

<table>
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<td>Communication Cost</td>
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<tr>
<td>Monthly Installment</td>
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<td>Health Cost</td>
<td>14.4</td>
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### Lifestyle (%)
Base: All Netizen Respondents (n=3,642)

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<th>Percentage</th>
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<td>Fashion</td>
<td>51.6</td>
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<td>Social</td>
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<td>Gadget</td>
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<td>Sport</td>
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<td>Hang Out</td>
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<td>Books</td>
<td>1.0</td>
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### Investment (%)
Base: All Netizen Respondents (n=3,642)

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<th>Percentage</th>
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<tr>
<td>Jewellery</td>
<td>0.5</td>
</tr>
<tr>
<td>Land</td>
<td>0.4</td>
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<tr>
<td>Education</td>
<td>0.3</td>
</tr>
<tr>
<td>Gold</td>
<td>0.3</td>
</tr>
</tbody>
</table>

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Preferred Investment Product

Youth (%)
Base: All Youth Respondents (n=12,652)

- Gold: 33.6
- Property: 13.4
- Savings: 5.3
- Unit Link: 1.2
- Stock: 0.9
- Business: 0.3

Women (%)
Base: All Women Respondents (n=9,823)

- Gold: 39.4
- Property: 14.8
- Savings: 5.0
- Unit Link: 1.5
- Stock: 0.8
- Business: 0.2

Netizens (%)
Base: All Netizen Respondents (n=3,642)

- Gold: 34.3
- Property: 16.5
- Savings: 5.2
- Unit Link: 2.6
- Stock: 1.1
- Business: 0.4

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Spouse’s Income Management

Do You Manage Your Spouse’s Income? (%)
Base: All Women Respondents (n=9,823)

- Yes: 78.8%
- No: 21.2%

Reason to Manage Spouse’s Income (%)
Base: All Women Respondents who Answer Yes (n=6,434)

- My husband let me do it: 13.5%
- To make it controllable: 12.9%
- To manage my family spending: 10.1%
- Don’t know the specific reason: 8.1%
- It’s my responsibility as a wife: 7.8%
- To be allocated for my daily needs: 7.5%
- To save some money: 4.8%
- I understand household matters better: 4.5%
- That’s our agreement: 2.7%
- I plan it better: 2.0%
- I understand it better: 2.0%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Spouse’s Income Management

Managing Spouse Income – by City (%)

Base: All Respondents

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<thead>
<tr>
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<th>Yes</th>
<th>No</th>
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<tbody>
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<tr>
<td>MEDAN</td>
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<td>PEKANBARU</td>
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<td>81.8</td>
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<table>
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<td>BALIKPAPAN</td>
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<tr>
<td>MAKASSAR</td>
<td>22.1</td>
<td>77.9</td>
</tr>
<tr>
<td>JAYAPURA</td>
<td>33.7</td>
<td>66.3</td>
</tr>
</tbody>
</table>

MarkPlus Insight
Marketing + Social Research
Decision Making Process in YWN Family

Husband’s Decision
Spouse’s Influence Only

Wife’s Decision
Spouse’s Influence Only

Wife’s Decision
Strong Influence from others

Husband’s Decision
Strong Influence from others

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Youths’ Communities: Religion-related & Arisan

**Community Involvement (%)**
Base: All Youth (n=12,652)

- Yes: 81.1%
- No: 18.9%

**Participated Community (%)**
Base: Youth in Community (n=2,385)

- Religious: 26.8%
- Arisan: 22.1%
- Hobby: 17.7%
- Social: 10.7%
- PKK: 10.1%
- Online: 7.2%
- Sport: 4.3%
- Professionals: 4.2%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Community Involvement (%)
Base: All Women (n=9,823)

Participated Community (%)
Base: Women in Community (n=2,312)

- Arisan: 36.1%
- Religion: 32.9%
- PKK: 21.5%
- Hoby: 8.1%
- Social: 7.7%
- Professionals: 3.4%
- Online: 3.2%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Netizens’ Communities: Religion & Hobby-related

Community Involvement (%)
Base: All Netizen (n=3,642)

- Yes: 78.0%
- No: 22.0%

Participated Community (%)
Base: Netizen in Community (n=800)

- Religion: 26.1%
- Hobby: 20.8%
- Arisan: 20.8%
- Social: 12%
- PKK: 8.6%
- Online: 4.9%
- Professional: 4.6%
- Sports: 4.1%
- College/University: 4%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Tips To Run YWN Community

#1 Celebrate Achievement, Share Results

#2 Empowerment, especially for Women

#3 Identify Leaders and Leverage Them
Question 2:

What is the most popular media among Youth?

Television, but soon will be replaced by Internet.
Youths’ Most Accessed Media: Television

Accessed Sources of Information (%)
Base: All Youth Respondents (n=12,652)

- TV: 65.9% accessed, 87.9% accessed the most
- Internet: 23.1% accessed, 65.1% accessed the most
- Newspaper: 8.9% accessed, 40.4% accessed the most
- Radio: 0.8% accessed, 9.7% accessed the most
- Magazine: 0.6% accessed, 6.1% accessed the most
- Tabloid: 0.4% accessed, 4.6% accessed the most

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Youth’s Accessed Media: by Age

Accessed Sources of Information (%) – by Age (%)
Base: All Youth Respondents (n=12,652)

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Women’s Most Accessed Media: Television

Accessed Sources of Information (%)
Base: All Women Respondents (n=9,823)

- **TV**: 90.0 (accessed), 74.0 (accessed the most)
- **Internet**: 54.1 (accessed), 16.6 (accessed the most)
- **Newspaper**: 36.8 (accessed), 7.1 (accessed the most)
- **Radio**: 10.4 (accessed), 0.8 (accessed the most)
- **Magazine**: 7.7 (accessed), 0.8 (accessed the most)
- **Tabloid**: 6.4 (accessed), 0.5 (accessed the most)

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Women’s Accessed Media: by Age

Accessed Sources of Information – by Age (%)
Base: All Respondents (n=3,642)

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Netizens’ Most Accessed Media: Internet

Accessed Sources of Information (%)
Base: All Netizen Respondents (n=3,642)

- Internet: 49.7%
- TV: 44.6%
- Newspaper: 35.1%
- Radio: 9.3%
- Magazine: 7.3%
- Tabloid: 5.2%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Netizens’ Accessed Media: by Age

Accessed Sources of Information – by Age (%)
Base: All Netizen Respondents (n=3,642)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Television</th>
<th>Internet</th>
<th>Newspaper</th>
<th>Radio</th>
<th>Magazine</th>
<th>Tabloid</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-19 yo</td>
<td>89.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
<tr>
<td>20-24 yo</td>
<td>88.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
<tr>
<td>25-29 yo</td>
<td>88.6</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
<tr>
<td>30-34 yo</td>
<td>91.4</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
<tr>
<td>35-39 yo</td>
<td>91.5</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
<tr>
<td>40-44 yo</td>
<td>91.6</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
<tr>
<td>45-49 yo</td>
<td>96.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Netizens’ Most Used Gadget for Internet Access: Smartphone

Used Gadget for Internet Access (%)
Base: All Netizen (n= 3,642)

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Netizens’ Most Preferred Activity on Internet: Social Media

Activities in The Internet (%)
Base: All Netizen (n= 3,642)

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
# Most Actively-Accessed Social Media

**Social Media Platform (%)**  
Base: All Netizen Respondents (n= 3,642)

<table>
<thead>
<tr>
<th>Social Media Platform</th>
<th>Total (n=3,642)</th>
<th>15-19 y.o (n=800)</th>
<th>20-24 y.o (n=948)</th>
<th>25-29 y.o (n=615)</th>
<th>30-34 y.o (n=465)</th>
<th>35-39 y.o (n=366)</th>
<th>40-44 y.o (n=214)</th>
<th>45-49 y.o (n=126)</th>
<th>50-55 y.o (n=66)</th>
<th>55-59 y.o (n=42)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>83.5</td>
<td>86.4</td>
<td>85.4</td>
<td>85.0</td>
<td>80.6</td>
<td>82.8</td>
<td>79.0</td>
<td>72.2</td>
<td>74.2</td>
<td>69.0</td>
</tr>
<tr>
<td>BBM Groups</td>
<td>50.3</td>
<td>44.3</td>
<td>53.8</td>
<td>55.3</td>
<td>50.5</td>
<td>48.1</td>
<td>52.8</td>
<td>47.6</td>
<td>47.0</td>
<td>31.0</td>
</tr>
<tr>
<td>Twitter</td>
<td>26.0</td>
<td>36.6</td>
<td>32.7</td>
<td>23.6</td>
<td>17.6</td>
<td>12.6</td>
<td>19.6</td>
<td>13.5</td>
<td>9.1</td>
<td>11.9</td>
</tr>
<tr>
<td>Google+</td>
<td>25.3</td>
<td>27.1</td>
<td>26.7</td>
<td>22.3</td>
<td>23.4</td>
<td>25.1</td>
<td>27.1</td>
<td>23.0</td>
<td>22.7</td>
<td>28.6</td>
</tr>
<tr>
<td>Whatsapp</td>
<td>19.9</td>
<td>18.5</td>
<td>21.2</td>
<td>19.3</td>
<td>19.4</td>
<td>20.5</td>
<td>25.7</td>
<td>18.3</td>
<td>12.1</td>
<td>9.5</td>
</tr>
<tr>
<td>Line</td>
<td><strong>9.6</strong></td>
<td><strong>13.0</strong></td>
<td><strong>12.2</strong></td>
<td><strong>8.3</strong></td>
<td><strong>8.6</strong></td>
<td><strong>3.3</strong></td>
<td><strong>6.1</strong></td>
<td><strong>8.7</strong></td>
<td><strong>4.5</strong></td>
<td><strong>2.4</strong></td>
</tr>
<tr>
<td>Instagram</td>
<td>8.2</td>
<td>11.5</td>
<td>11.7</td>
<td>5.9</td>
<td>4.9</td>
<td>3.0</td>
<td>5.1</td>
<td>7.9</td>
<td>4.5</td>
<td></td>
</tr>
<tr>
<td>Kakao</td>
<td>5.5</td>
<td>7.3</td>
<td>6.4</td>
<td>4.2</td>
<td>5.4</td>
<td>3.6</td>
<td>3.7</td>
<td>7.1</td>
<td>3.0</td>
<td></td>
</tr>
<tr>
<td>Path</td>
<td>4.9</td>
<td><strong>8.0</strong></td>
<td><strong>7.0</strong></td>
<td>4.1</td>
<td>2.4</td>
<td>1.6</td>
<td>2.3</td>
<td>1.6</td>
<td>1.5</td>
<td></td>
</tr>
</tbody>
</table>

*MarkPlus Insight: Marketing + Social Research*
Question 3:

What is the proportion of Netizen who shop online?

Only 1 out of 5 Indonesian Netizen shop online
Netizens’ Most Bought Item Online: Clothing

Shopping Online or Not (%)
Base: All Respondents (n=3,642)

Online Purchases – by Product (%)
Base: All Respondents (n=752)

- Cloth: 57.2%
- Shoes: 31.9%
- Bag, Wallet: 28.6%
- Watch: 10.8%
- Handphone/Tablet: 9.9%
- Cinema Ticket: 7.4%
- Medicine: 6.1%
- Airplane ticket: 5.9%
- Cosmetic: 5.2%
- Book: 3.9%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Why Online Shopping?

**Cinema Tickets (%)**
Base: All buyers (n=125)

- Interesting ads: 24.8%
- Discount promotion: 20.0%
- Affordable price: 8.8%

Avg. Expenditure: Rp. 47,561

**Handbags & Wallets (%)**
Base: All buyers (n=455)

- Affordable price: 22.0%
- Famous brands: 19.8%
- Interesting ads: 16.7%

Avg. Expenditure: Rp. 343,084

**Clothes (%)**
Base: All buyers (n=998)

- Affordable price: 22.2%
- Famous brands: 33.3%
- Interesting ads: 88.9%

Avg. Expenditure: Rp. 253,096

**Handphones/Tablets (%)**
Base: All buyers (n=174)

- Affordable price: 20.7%
- Famous brands: 15.5%
- Discount: 13.2%

Avg. Expenditure: Rp. 2,063,817

**Watches (%)**
Base: All Buyers (n=168)

- Affordable price: 22.0%
- Famous brands: 18.5%
- Discount: 18.5%

Avg. Expenditure: Rp. 453,284

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
### Why Online Shopping?

<table>
<thead>
<tr>
<th>Item</th>
<th>Base: All Respondents (n)</th>
<th>Famous brands</th>
<th>Affordable price</th>
<th>Discount</th>
<th>Recommendation</th>
<th>Famous brands</th>
<th>Affordable price</th>
<th>Discount</th>
<th>Interesting ads</th>
<th>Affordable price</th>
<th>Discount</th>
<th>Avg. Expenditure:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Footwear (%)</strong></td>
<td>532</td>
<td>20.1</td>
<td>18.4</td>
<td>17.3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Rp. 279,582</td>
</tr>
<tr>
<td><strong>Book (%)</strong></td>
<td>65</td>
<td></td>
<td></td>
<td></td>
<td>20.0</td>
<td>15.4</td>
<td></td>
<td></td>
<td>15.4</td>
<td></td>
<td></td>
<td>Rp. 229,396</td>
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<tr>
<td><strong>Cosmetics (%)</strong></td>
<td>78</td>
<td></td>
<td></td>
<td></td>
<td>25.6</td>
<td>24.4</td>
<td>19.2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Rp. 455,147</td>
</tr>
<tr>
<td><strong>Medicine (%)</strong></td>
<td>97</td>
<td>2.1</td>
<td></td>
<td></td>
<td></td>
<td>2.1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Rp. 241,666</td>
</tr>
<tr>
<td><strong>Plane Ticket (%)</strong></td>
<td>121</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>27.3</td>
<td></td>
<td></td>
<td>25.6</td>
<td></td>
<td></td>
<td>Rp. 1,279,096</td>
</tr>
</tbody>
</table>

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
**Trust & Satisfaction Levels: Official Website**

**Level of Trustworthiness (%)**
Base: Respondents who shop at official website (n=274)

- Trusted: 88.3%
- Untrusted: 11.7%

**Satisfaction Level (%)**
Base: Respondents who shop at website (n=274)

- Satisfied: 87.6%
- Unsatisfied: 12.4%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Trust & Satisfaction Levels: Market Place

Level of Trustworthiness (%)
Base: Respondents who shop at online store (n=417)

- Trusted: 85.4%
- Untrusted: 14.6%

Satisfaction Level (%)
Base: Respondents who shop at online store (n=417)

- Satisfied: 85.9%
- Unsatisfied: 14.1%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Trust & Satisfaction Levels: Online forum

Level of Trustworthiness (%)
Base: Respondents who shop at online forum (n=274)

- Trusted: 67.2%
- Untrusted: 32.8%

Satisfaction Level (%)
Base: Respondents who shop at online forum (n=274)

- Satisfied: 55.1%
- Unsatisfied: 44.9%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Trust & Satisfaction Levels: Social Media

Level of Trustworthiness (%)
Base: Respondents who shop at social media (n=234)

- Trusted: 84.6%
- Untrusted: 15.4%

Satisfaction Level (%)
Base: Respondents who shop at social media (n=274)

- Satisfied: 72.2%
- Unsatisfied: 27.8%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Trust & Satisfaction Levels: BBM

Level of Trustworthiness (%)
Base: Respondents who shop at blackberry messenger (n=404)

- Trusted: 87.4%
- Untrusted: 12.6%

Satisfaction Level (%)
Base: Respondents who shop at blackberry messenger (n=404)

- Satisfied: 65.1%
- Unsatisfied: 34.9%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Trust & Satisfaction Levels: Blogs

Level of Trustworthiness (%)
Base: Respondents who shop at blog (n=76)
- Trusted: 23.7%
- Untrusted: 76.3%

Satisfaction Level (%)
Base: Respondents who shop at blog (n=76)
- Satisfied: 57.9%
- Unsatisfied: 42.1%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Youths’ Favorite Hobbies

**Hobby – by Gender (%)**
Base: All Youth Respondents

- **Listening to music**
  - Total (n=12,652): 41.5%
  - Male (n=6,286): 38.8%
  - Female (n=6,366): 44.2%

- **Reading**
  - Total (n=12,652): 18.9%
  - Male (n=6,286): 15.4%
  - Female (n=6,366): 22.4%

- **Doing sports**
  - Total (n=12,652): 18.4%
  - Male (n=6,286): 27.4%
  - Female (n=6,366): 9.5%

- **Travelling**
  - Total (n=12,652): 11.0%
  - Male (n=6,286): 10.8%
  - Female (n=6,366): 11.3%

**Source:** MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Women’s Favorite Hobbies

Hobby – by Marital Status (%)
Base: All Youth Respondents

- Listening Music
- Reading
- Cooking
- Traveling

All (n=9,823)
- Listening Music: 38.4%
- Reading: 21.5%
- Cooking: 10.4%
- Traveling: 10.1%

Single (n=3,553)
- Listening Music: 50.2%
- Reading: 25.9%
- Cooking: 2.6%
- Traveling: 12.5%

Married (n=6,270)
- Listening Music: 31.7%
- Reading: 19.0%
- Cooking: 14.8%
- Traveling: 8.7%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Netizens’ Favorite Hobbies

Hobby – by Gender (%)
Base: All Respondents

- Listen to music
- Reading
- Doing sports
- Travelling

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
# Youth’s Most Bought New Product: Smartphones

## Top Ten Products Bought Within A Year (%)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Product</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Smartphone</td>
<td>22.7</td>
</tr>
<tr>
<td>2</td>
<td>Headphone</td>
<td>21.3</td>
</tr>
<tr>
<td>3</td>
<td>Motorcycle</td>
<td>13.9</td>
</tr>
<tr>
<td>4</td>
<td>Laptop</td>
<td>8.3</td>
</tr>
<tr>
<td>5</td>
<td>Tablet</td>
<td>6.6</td>
</tr>
<tr>
<td>6</td>
<td>Car</td>
<td>3.1</td>
</tr>
<tr>
<td>7</td>
<td>Camera</td>
<td>2.8</td>
</tr>
<tr>
<td>8</td>
<td>Sport Utility</td>
<td>1.1</td>
</tr>
<tr>
<td>9</td>
<td>Cloth</td>
<td>0.7</td>
</tr>
<tr>
<td>10</td>
<td>Shoes</td>
<td>0.4</td>
</tr>
</tbody>
</table>

Base: All Youth Respondents (n=21,283)

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Pay TV Ownership

INSTALLED PAY TV AT HOME? (%)
Base: All Youth Respondents (n=12,652)

Reasons for Installing (%)
Base: All Pay TV Subscribers (n=2,627)
- Lots of channel: 39.9%
- Clean: 20.3%
- Lots of shows: 12.6%
- Interesting shows: 3.8%
- Foreign channel: 3.0%

Reasons for Not Installing (%)
Base: No Pay TV Subscribers (n=10,025)
- High installment cost: 21.9%
- Enough shows from current...: 10.1%
- Not interested: 9.6%
- Satisfy with current channel's shows: 6.0%
- It is not important: 4.3%

Source: MarkPlus Insight: Indonesia Consumer Survey 2014, 18 provinces, 21,283 respondents
Indonesia YWN Most Popular Brand
How Can I Understand YWN?
Understanding Youth’s Segments

**Trendsetter Tiger**
- Early adopters
- Doesn’t value shopping experience
- Having good internet exposure

**Bracious Bull (Brave – cautious)**
- Adaptive
- Need to touch, see and feel the products before actually buy it
- Cautious about money and transaction safety

**Shop online**
- Shopping behavior
- 10%

**Shop offline**
- Shopping behavior
- 44%

**Practical Panda**
- Enjoying their own comfort zone
- Love simple process
- Need confirmation from other

**Old skool Oyster**
- Laggard
- More cautious
- Price sensitive

MarkPlus Insight
Marketing + Social Research
Understanding Women’s Segments

- **Mighty Miranda**
  - Taking an important role in decision making process for almost all products
  - Family comes first
  - Spend most of her time with family

- **Controlling Carrie**
  - Take control in family finance
  - My friends & I are the most important thing
  - Spend most of the time for her hobby

- **Caring Charlotte**
  - Decide the basic items for her family
  - Will sacrifice herself for the family
  - Obey the husband

- **Social Samantha**
  - Decide the basic needs for her family
  - My friends & I are the most important thing
  - Following the trend to keep updated

- **Decision Maker**
  - 41%
- **My friends and I**
  - 20%
- **Life’s priority**
  - 26%
- **Weak**
  - 13%
Understanding Netizens’ Segments

- **Net-Junkie**
  - Addicted to internet
  - Internet is seen as something ‘fun’
  - More to video and image
  - 8%

- **Net-Guru**
  - Can’t live without internet
  - Internet is seen as something ‘smart’
  - More to video, image and text
  - 37%

- **Net-Observer**
  - Accessing internet only when it’s needed
  - Internet is seen as ‘source of information’
  - More to video, image and text
  - 44%

- **Net-Nubie**
  - Accessing internet only when they are bored
  - Internet is seen as entertainment (including game)
  - More to image and text
  - 11%
Study on Savings Accounts: Translating Anxieties & Desires into Products Features

Savings Accounts

Youth

Anxieties & Desires

Becoming rich and established

Needs & Expectations

- Simple Requirements
  - High return
  - Customizable
Study on Savings Accounts: Translating Anxieties & Desires into Products Features

Women

Savings Accounts

Anxieties & Desires

Becoming fruitful and productive in her multiple roles

Needs & Expectations

- Multifunctional accounts
- No additional (admin) fees
- Creates compulsive savings
Study on Savings Accounts: Translating Anxieties & Desires into Products Features

**Savings Accounts**

**Anxieties & Desires**
- Get better, faster and easier
- Productive and limitless

**Needs & Expectations**
- Friendly Internet Banking Interface
- Additional features on internet banking (stocks transaction, etc)
- Accessible Customer Care
Video FGD
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CONSUMER PACKAGED FOOD & BEVERAGE
Tea - Paper Pack
APRIL 2014

Tight competition between two market leaders of Tea Paper.
The research detail are as follows:

- Sample size: 600 respondents
- Area: Jabodetabek, Bandung, Semarang, Surabaya, Medan, Balikpapan, Makassar, and Denpasar
- Specific Role: Purchase decision maker
- Gender: Both male and female
- SEC: A, B and C (basic routine expenditure above IDR 1 million)
- Age: 20-50 years old
- Education / Job Specification: Minimum senior high school students & workers who not work in the field of market research/mass media/advertising/sauce industry

For Tea Paper Pack category, we gathered responses from 288 respondents in those respected cities.

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