

INDONESIA GEN Z REPORT 2022

Understanding and Uncovering
the Behavior, Challenges
and Opportunities



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Executive Summary

Indonesian Gen Z by the numbers

With 70.72% of its population in productive age (15 to 64), Indonesia is enjoying a demographic bonus, which is hoped to help the country achieve its golden period in 2045. The Gen Z (born between 1997 and 2012) is currently the biggest generation group in Indonesia with 27.94% of the total population or 74.93 million people. Their significant might even be bigger than that of the Millennials, which makes up the second largest generation in Indonesia with 25.87% of the total population or 69.38 million people.

Almost half of Gen Z have entered the productive age, while the rest will be able to participate in the workforce in the coming years. As a generation that grew up after 1998 political reform in Indonesia and part of the so-called digital native, the Gen Z surely has different attitude and behavior compared to the older generations. Understanding who the Gen Z really are, starting from their lifestyle, perspective, and values to their goals and challenges in life will help us uncover the true path to Indonesia's golden era.

Objective and methodology of research

The availability of research about Indonesian Gen Z is very limited. This scarcity has caused the emergence of myths and stereotypes about them. Therefore, IDN Research Institute, in collaboration with Populix as our research partner, spearheaded this research to gain a deeper understanding about Indonesian Gen Z, especially their values and aspirations that shapes the way they see themselves as individuals. This research's objective is also to explore Indonesian Gen Z's decisions and reasons behind their lifestyles and behaviors on a daily basis.

Populix conducted this research by using quantitative method. The quantitative method was conducted using random sampling in 12 cities and agglomerations in Indonesia. We continued with the qualitative method to dig more deeply about those segmentations through indepth interviews. Then, IDN Research Institute developed and wrote the report based on the insight gained from data analysis.

The definition of Gen Z in this report is male and female between the age of 15 to 24 years old in the year 2022. We divided the Gen Z into two categories; late teens who are between 15 and 20 years old and young adults who are between 21 and 24 years old.

All opinions expressed are from IDN Research Institute and are intended as educational material. Although best efforts are made to ensure that all information is accurate and up to date, occasionally unintended errors and misprints may occur.





What to expect from this report

Our goal is to present a clear and complete portrait of Indonesian Gen Z, as well as to offer thought-provoking analyses of issues that will affect them in the years to come. We take a holistic view of their entire life aspect, emphasizing their distinct behaviors, and identifying where opportunities can be found for businesses.

Our team at IDN Research Institute hope that this research report would be a valuable tool for readers from all backgrounds and industries to understand Gen Z better, and to unlock those who shape and will lead the nation.





**RELIGION
VALUES
— AND —
TRADITION**



Gen Z are experiencing their first large-scale crisis (COVID-19 pandemic) and relying heavily on faith amid uncertainties



Indonesian Gen Z were born during tumultuous years in the country's history, nearing the fall of the New Order and Reformasi in 1998, which led to drastic changes in society. The eldest of Gen Z have started working and having their own family, two of several life milestones that define stability and maturity in one's life journey. However, these milestones are surrounded by uncertainties in terms of one's health, wellbeing, and even job and economic security brought by the COVID-19 pandemic. It is interesting to see what values and norms that the Gen Z holds on to in this search for stability during such a turbulent time.

We talked to several Gen Z to ask about the role of religion and tradition in their lives, and we found that religion played a bigger role compared to tradition. The Gen Z that we talked to admitted that they considered religion as a guidance and foundation in life, as well as boundaries that set their behavior and perspective. On the contrary, these Gen Z said that they rarely practiced or held on to their cultural traditions due to the fact that their environment has become more multicultural or even let go of tradition altogether and embrace modern values and lifestyle.

What is the role of religion in Gen Z's life?

"Belief in God is something to hold on to in life when other people can't be relied on."

"As a perspective and guidance in life."



"Religion rules how life should be lived."

As the way of life and source of meaning in life."

"As boundaries, in the mind and actions."



Majority believes that religious tolerance practice in Indonesia is good enough

Is the tolerance between religious communities good in Gen Z view?

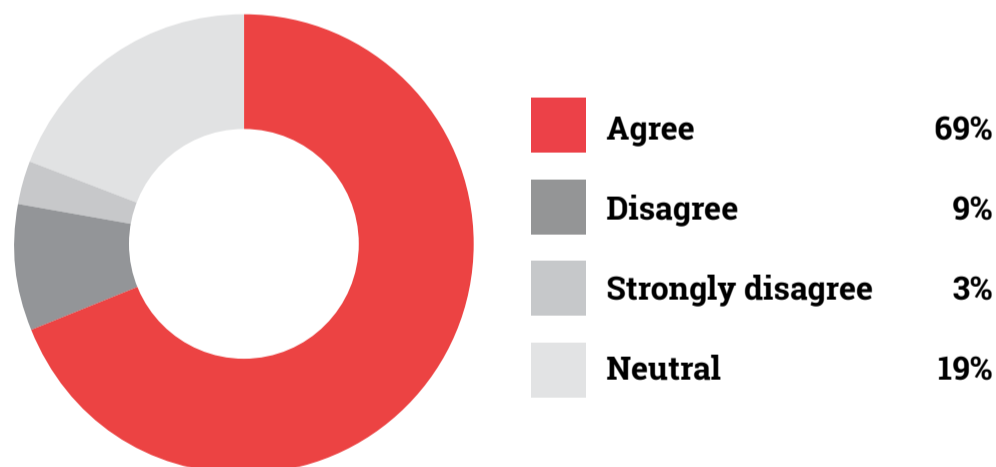


Image 1.1
Gen Z who believe that tolerance between religious communities in Indonesia is good

69% of Gen Z believe that tolerance between religious communities in Indonesia is good enough. 9% disagree with this statement and only 3% strongly disagree. This could reflect either hope or denial over some lingering intolerance acts that have been accepted as normal, or simply due to personal bias as most of the Gen Z in the survey are Muslim – which makes up 90% of Indonesian population and face less discrimination and intolerance as the majority.

We talked to a Catholic Priest, Romo Kristoforus Lucky Nikasius, the Head of Santa Maria Regina Church in Tangerang about tolerance in Indonesia.



Romo Kristoforus Lucky Nikasius, the Head of Santa Maria Regina Church in Tangerang

“Looking at Indonesia with a simplistic majority and minority view won’t help us unite the country. It all starts with us as an individual: Can we be an active participant in this pluralism project? The golden rule in Catholicism is to do onto others what you want them to do to you. So, if you want to be loved and respected –not just to be tolerated–, you should start loving and respecting others first.”

61%

Gen Z say that the religion of a political figure is an important factor in choosing a leader



Identity politics still matter, but tolerance is non-negotiable. Polarization based on identity lines is not acceptable for Indonesian Millennials, who have seen the tiresome debate about religion and politics during the 2016 Gubernatorial Election in Jakarta and the 2019 General Election.



Decmonth Pasaribu of Extinction Rebellion Indonesia

“Gen Z are more vocal in demanding pro-climate justice policies as the time is more pressing. We are getting closer to 2030 [the deadline for greenhouse reduction target] and there are also more options in terms of green policies and development. As a generation that must live with the environmental disasters caused by economic growth in the past decades, Gen Z are more concerned about climate justice, to ensure that our descendants can also enjoy and live on Earth.”

79%

Gen Z say that climate change is a serious issue



Globally, Gen Z is known for their climate consciousness and activism – with Greta Thunberg as the most well-known young climate activist. In Indonesia, awareness over climate change and its impacts are also increasing. 79% of Gen Z say that climate change is a serious issue that Indonesia is facing today. As an archipelagic country located in the equator, Indonesia is witnessing sea level rise and extreme weather as impacts of global warming, resulting in severe droughts or floods.

70%

Feel responsible for climate change



66%

Willing to spend extra for more eco-conscious products



Image 1.2 Gen Z thoughts on climate change

Indonesian Gen Z take climate change seriously. 70% feel personally responsible to alleviate the impact of climate change and 66% Gen Z are willing to spend extra for more eco-conscious products. These figures show the rise of a new generation of eco-conscious consumers whose economic decision is influenced by the climate factor.

Growing climate awareness, anxiety and activism



52% of Gen Z say that gender equality in Indonesia is good, but there are long way to go in improving the situation

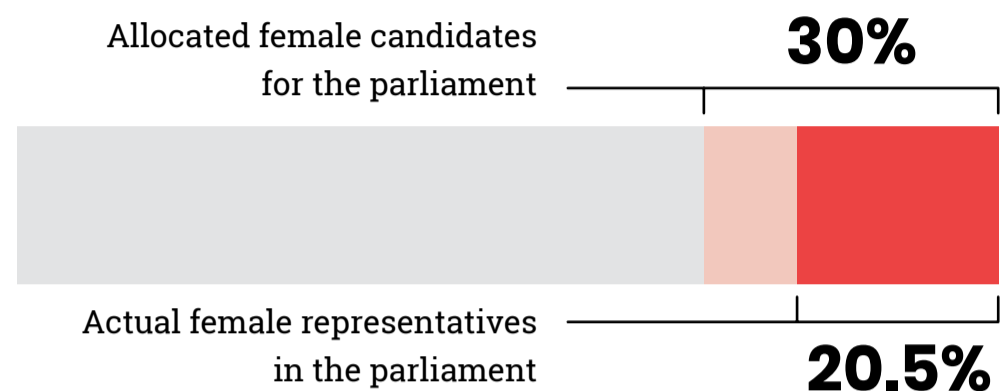


Image 1.4
Female representation in the parliament

In Indonesia, political parties must allocate 30% of the legislative candidate list for female candidates to boost women’s representation in politics. In 2019, Puan Maharani was sworn in as the first female speaker of the House of Representatives. However, only 118 out of 575 seats or 20.5% in the parliament are held by female representatives.

At the ministerial level, there are only six female ministers out of 34 positions (18%) in the *Kabinet Indonesia Maju*. Foreign Affairs Minister Retno Marsudi, Finance Minister Sri Mulyani, Social Affairs Minister Tri Rismaharini, Manpower Minister Ida Fauziyah, Environment and Forestry Minister Siti Nurbaya, and Women Empowerment and Children Protection Minister I Gusti Ayu Bintang Darmavati.

58%

Agree that women are equal to men



60%

Believe that women can be leaders too



Image 1.3
Gen Z thoughts about women on gender equality

Furthermore, 58 % agree that women are equal to men and 60% believe that women can be leaders too. Now, it’s a matter of providing more opportunities and affirmative actions so that more women can unleash their potential and truly be equal to men.

5 female CEOs in FORTUNE 100 List by FORTUNE Indonesia November Edition:

1. Parwati Surjaudaja of OCBC NISP
2. Nicke Widyawati of Pertamina
3. Ira Noviarti of Unilever
4. Dian Siswarini of XL Axiata
5. Febbriany Eddy of Vale

Indonesian women are breaking the glass ceiling by holding leadership positions in the government or corporate world. While Gen Z are mostly still starting their career, their Millennial counterparts are rising in key sectors such as Chusnunia Chalim, Deputy Governor of Lampung, in politics and Najwa Shihab in journalism – two previously male dominated sectors. Representation matters as it provides a female-centric perspective in decision-making.

Chusnunia Chalim,
Deputy Governor of Lampung

“There are still problems in the government [related to gender equality]. But we are more open now, and we have more women in significant posts. Our homework is increasing the number of female workers as there’s still a huge gender gap.”

What Gen Z believe of why sexual violence occurs:

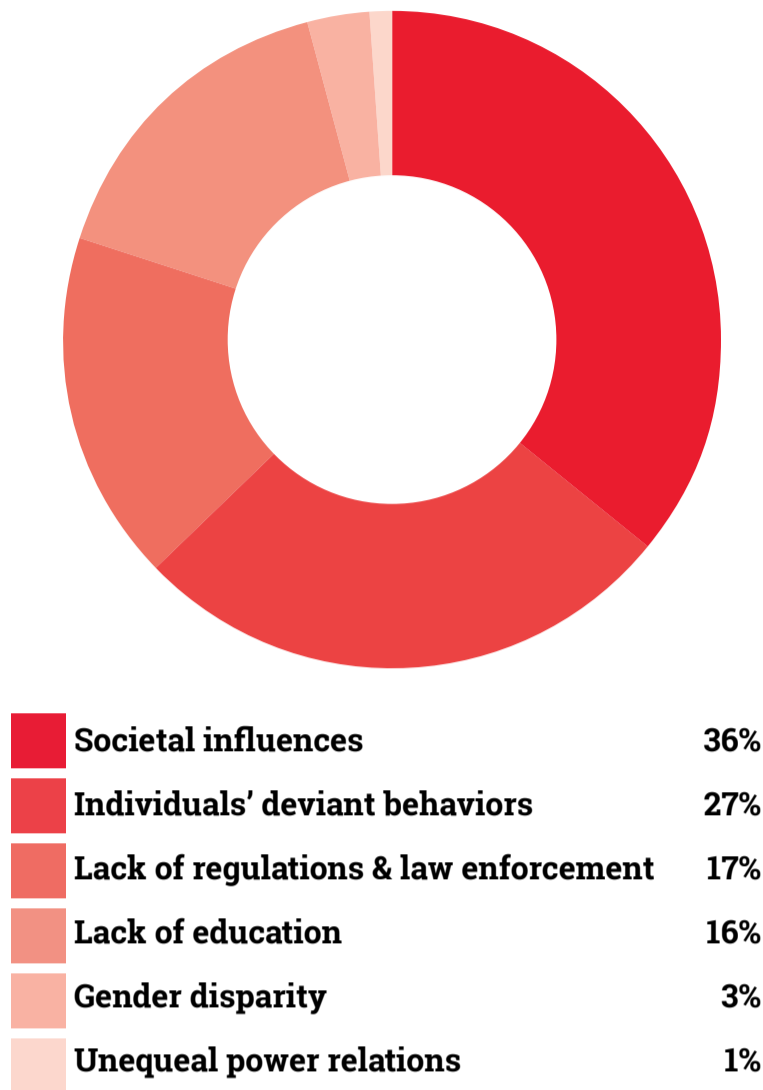



Image 1.5 Contributor factors of sexual violence



On April 12, the Indonesian parliament passed the sexual violence eradication bill (RUU-PKS) into law. In the past few years, the call to pass the bill had been getting stronger as more survivors were speaking up about their experiences. 17% of Gen Z believe that sexual violence happens due to lack of regulations and law enforcement, while more than half still think that sexual violence occurs due to societal influence (36%), individual's deviant behavior (27%), and lack of education (16%). Few Gen Z directly point to gender disparity (3%) and unequal power relations (1%).

Data from IDN Times show that audience's interests about the RUU-PKS increased by 26.9% in 2021 compared to 2020, reflecting growing awareness over the importance of sexual violence eradication in Indonesia.



Amar Alfikar, religious scholar and Board Representative of The Global Interfaith Network

“Every religion, at its heart, teaches humans about justice and humanity. Islam does too. The ‘tauhid’ in Islam is a sacred message to not worship anything or anyone but God, which means that women must not worship men or vice versa. Hence, women are considered as God’s worshipers, equal to men. In the Quran, there’s surah An-Nisa’, meaning woman, which is a critique to Arabic culture around the birth of Islam that was considered unfair to women.”



58%

Gen Z have participated in some sort of fundraising with varying degrees of frequency



Past global survey has named Indonesia as “the most generous nation in the world” – perhaps due to *zakat* (obligatory almsgiving) among the Muslims and the national tradition of *gotong royong* (mutual cooperation).

Gen Z who have donated through online platforms:

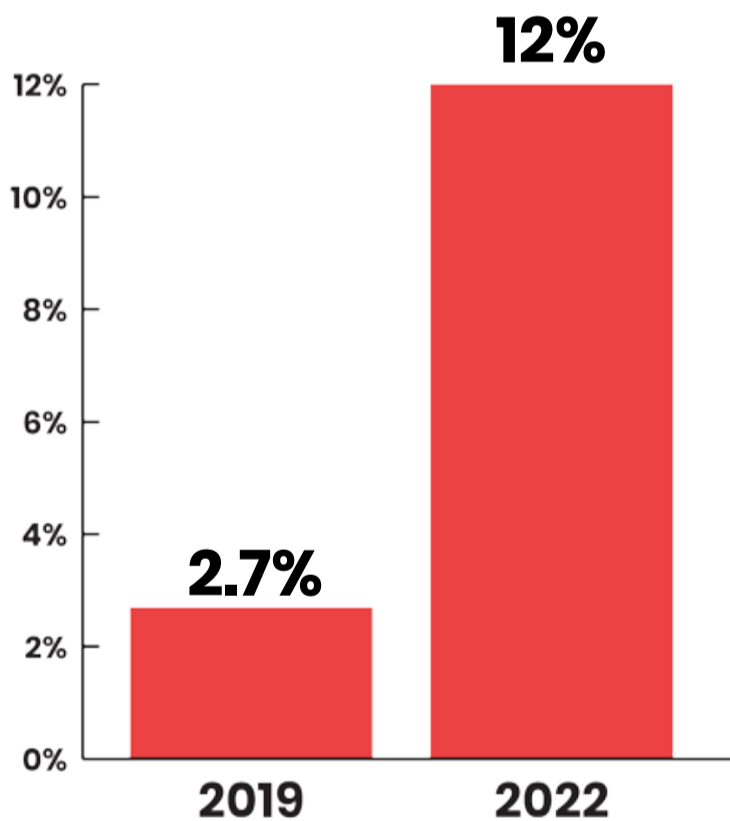


Image 1.6
Gen Z who have donated through online platforms

12% of Gen Z say that they have donated through online platforms, meaning that charitable acts are still mostly done physically. However, the figure has increased from our 2019 findings, in which only 2.7% of Millennials had donated through online platforms. The popularity of online donation platforms has increased since the pandemic hit Indonesia, due to the accelerated digitalization and the sheer amount of people who need help amid the pandemic.

Charitable act despite limited resources

Top 5 online donation platforms:

- 1 Kitabisa.com
- 2 DOMPET DHUafa
- 3 ACT
care for humanity
- 4 ayopeduli.id
Peduli Sesama, Sejahtera Bersama
- 5 BenihBaik.com

Image 1.7
Top 5: Kitabisa.com, Dompethuafa.com, Act.com (Aksi Cepat Tanggap), Ayopeduli.com, BenihBaik.com

In July 2022, *Tempo* Magazine published an exposé of alleged embezzlement by the founder and leader of *Aksi Cepat Tanggap* (ACT), Ahyuddin. He allegedly used the money from charity for his own personal use. Those who held top positions at the company were also known to have staggeringly high salary and luxurious cars provided by the company. ACT is also criticized for taking too much cut at 13.7% on average from public donation campaigns, despite government regulation that limits the cut to 10%. The Social Affairs Ministry revoked ACT’s crowdfunding permit following the report.

Indonesian K-Pop fandom often organizes charity drives or fundraising for certain events or causes, from helping those affected by flooding or earthquake to mangrove plantings.

- In December 2021, BTS ARMY Indonesia started a fundraising campaign on Kitabisa for those who were affected by the Semeru volcanic eruption. They managed to achieve the target of Rp 90.437.789.
- Seonhohada Indonesia Project also managed to reach Rp 136.109.376 for a charity drive to celebrate their idol actor Kim Seonho’s birthday. The campaign aimed to provide free food for the poor and homeless people during fasting month Ramadan.

Faye Simanjuntak is one Gen Z with focus on social movement and activism. Faye is the founder of *Rumah Faye*, a nonprofit organization that provides safe houses for victims of child trafficking and raises awareness over the protection of women and children in the country “The first step to help is to have the willingness to do the hard work. Second is to learn, not only about the issues but also hard skills that are actually needed on the ground. Third, as we are still young and inexperienced, is to look for existing organizations or movements that need our help,” said Faye, when asked for tips on how fellow Gen Z can participate in social movement and activism.



FAMILY LIFE







Jerome Polin via Instagram (@jeromepolin)

“I am grateful for my parents who have continuously taught, loved, and supported me to this date. Without them, I would’ve not been able to become who I am today. They are my role model when it comes to love, hard work, religion, and down to the small things.”



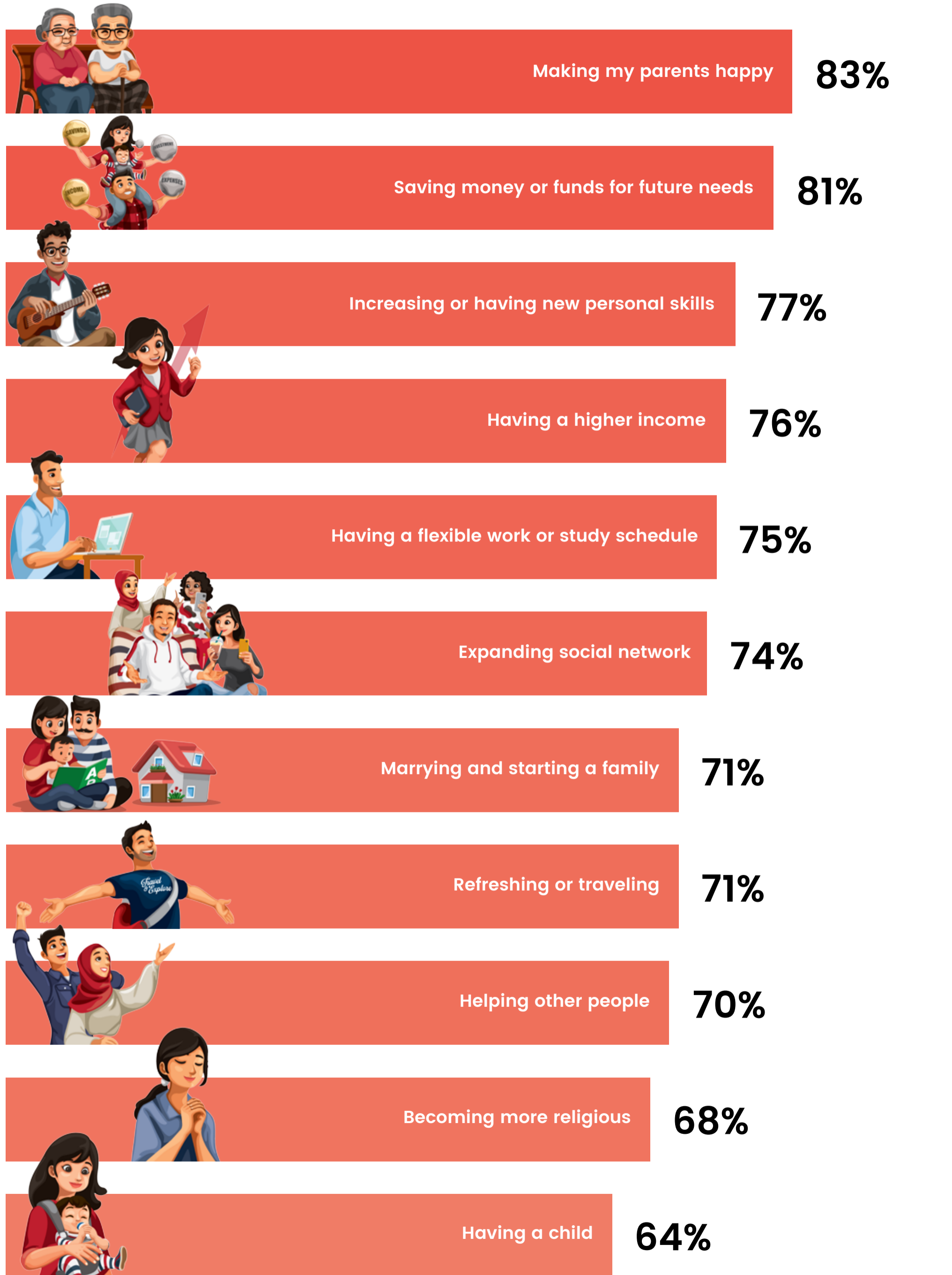
Parents are the number one priority for Gen Z

When asked about their priorities in life, most of Gen Z (83%) say that they want to make their parents happy. Their parents become their first priority in life, beating other and more individual goals such as earning money for future needs (81%), self development (77%), having a higher income (76%), and even having a flexible work and study arrangement.

Perhaps, if one should search for a silver lining of the quarantine, is that Gen Z are spending more time with their parents and therefore increasing their appreciation of the filial relationship between them. Although, one also couldn't deny that many Gen Z and other Indonesian children have lost their parents to the pandemic.

44% of Gen Z in our survey are students and 6% are unemployed, implying that they are still dependent on their parents. As the pandemic has forced the youth to stay inside their house longer due to school and university closures as well as unfavorable job markets, Gen Z is spending more time with their family compared to their Millennial counterparts when they were at the same age.

Gen Z's priorities in life



Gen Z ideal age for marriage 26–30 years old, significantly older than Millennial or Gen X’s ideal age for marriage

Starting a new family does not make it to the top 5 of Gen Z’s list of priorities. Only 71% of Gen Z say that marrying and starting a new family is their priority in life, while having a child becomes the least important priority (64%) for them.

However, some Gen Z are also in the “ideal age” to marry – according to their own perception. For instance, 42% of Gen Z who are aged between 21 and 24 years old say that the ideal age for marriage is when they’re 21 - 25 years old, with 53% of Gen Z at the same age group say that the ideal age for marriage is when they’re 26 - 30 years old.



Ideal age for marriage according to Gen Z young adults:

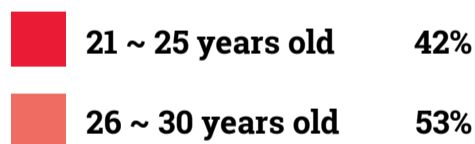


Image 2.2
Ideal age for marriage according to Gen Z young adults

Another explanation about lack of priority in starting a family is the economy. Gen Z are starting their life as young adult at a discouraging time as the COVID-19 pandemic has hampered their education and job search, and in the larger scale, negatively impacted the economy as Indonesia experienced an economic contraction of 2.07% in 2020 and relatively slower growth at 3.69% in 2021.

Perhaps, fear of having to be part of the sandwich generation also makes Gen Z more hesitant when it comes to having their own family. Interest for “sandwich generation” on IDN Times increased by 33.82% in 2021 compared to 2020, reflecting growing awareness of the phenomenon. 45% of Gen Z even agree that childfree marriage is no longer a taboo. In general, the fertility rate in Indonesia has steadily fallen in recent years. The government even targets to keep it down to 2.1 children per woman by 2025 to stabilize population growth.

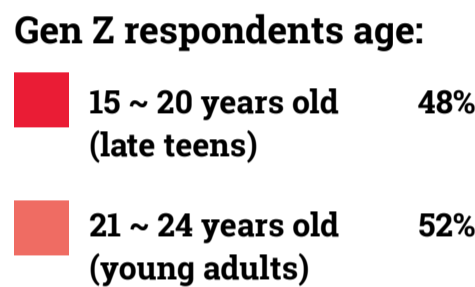


Image 2.1
Gen Z respondents age

This could be due to the fact that Gen Z are still very young, with 48% of our respondents are aged between 15 and 20 years old (late teens) and 52% between 21 and 24 years old (young adults). At this age, Gen Z are still studying and starting a career, which makes having their own family a distant step in their life milestones.

Statistics Indonesia has not published a report on the prevalence of sandwich generation in Indonesia, but the latest population census in 2020 shows an aging population. By 2045, it is projected that 1 in every 5 Indonesians will be elderly, defined as those who are at least 60 years old. Latest figures have also shown the looming burden on Millennials and Gen Z to take care of their parents.

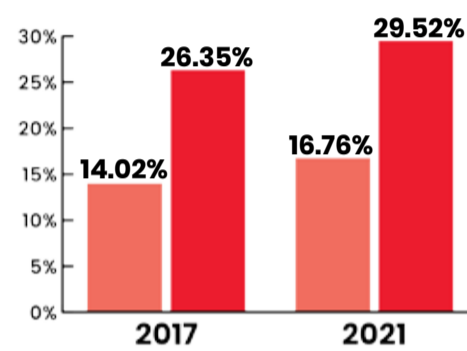


Image 2.3
Elderly dependency

34.71%
Elderly people live in a three-generation household



From 2017 to 2021, the ratio of elderly dependency steadily increased from 14.02% to 16.76%, meaning that every 100 productive age citizens (aged 15 to 59 years old) must take care of at least 17 elderly citizens.

During the same period, the number of households with elderly members has also increased. In 2017, the rate of households with elderly members was 26.35%. In 2021, the rate increased to 29.52%, meaning that 1 in every 4 households in Indonesia has at least an elderly living with them. As of 2021, 34.71% of elderly people live in a three-generation household.



Gen Z still holds on to traditional gender roles, prefers intimate weddings

84%

Men as the head of the family, being the breadwinner



61%

Women have the responsibility to take care of the children and to do household chores.



69%

Men have the final say in household decisions



Image 2.4
Gen Z's view on responsibility of husband and wives

Indonesian Gen Z still have a traditional view of a family, especially when it comes to the responsibility of husband and wives. Men are still viewed as the head of the family, in terms of being the breadwinner (84%) and having the final say in household decisions (69%). 61% of Gen Z say that women have the responsibility to take care of the children and to do household chores.



Gen Z respondents age:

- **Wedding should be a big celebration** 30%
- **Prefered small & intimate wedding** 39%
- **Neutral** 31%

Image 2.5
Gen Z's view on weddings

Only 30% of Gen Z say that weddings should be a big celebration, with 39% of Gen Z disagreeing – reflecting a preference for small, intimate weddings instead. 31% say they are neutral about this, which is understandable considering that Indonesian weddings are sometimes a family affair instead of the couple's own and the Gen Z's ambivalent stance about marriage.

Gen Z from lower socio-economic classes are geared toward intimate weddings, while those from upper and middle socio-economic classes lean toward big celebrations. Perhaps, as lower SEC has been the most heavily impacted by pandemic-induced economic crisis, they are cutting down on unnecessary cost such as wedding celebrations.

The pandemic has arguably given rise to small, intimate weddings as COVID-19 restrictions drastically limit the number of guests in an event. Pragmatism and necessity come into play in the decision to host an intimate wedding. However, several couples still host a bigger reception, attended by more guests, after the holy matrimony, usually reserved for family and closest friends.





EDUCATION

— AND —

CAREER



**CONTRACT-BASED
ECONOMY**

**FREELANCE &
ENTREPRENEURSHIP**

**WHITE COLLAR &
BLUE COLLAR JOBS**

JOB OPPORTUNITIES

CV

The frontliner of Indonesia's demographic bonus

The Gen Z is touted as part of Indonesia's demographic bonus, a condition in which a country's working age population makes up the bulk of the population so that the income per capita increases – reflecting both high levels of production and consumption. However, Gen Z nowadays are facing challenges in their education as well as the job market, which might diminish the actualization of the demographic bonus.

Indonesian Gen Z grew up under the obligatory 12-year schooling regulations, which explains how most of them have at least graduated from senior high school. However, the chance of a Gen Z finishing high school is influenced by socio-economic classes and gender. The more affluent a Gen Z is, the more education they are likely to complete 12 years of obligatory schooling.



Indonesian youth's years of education:

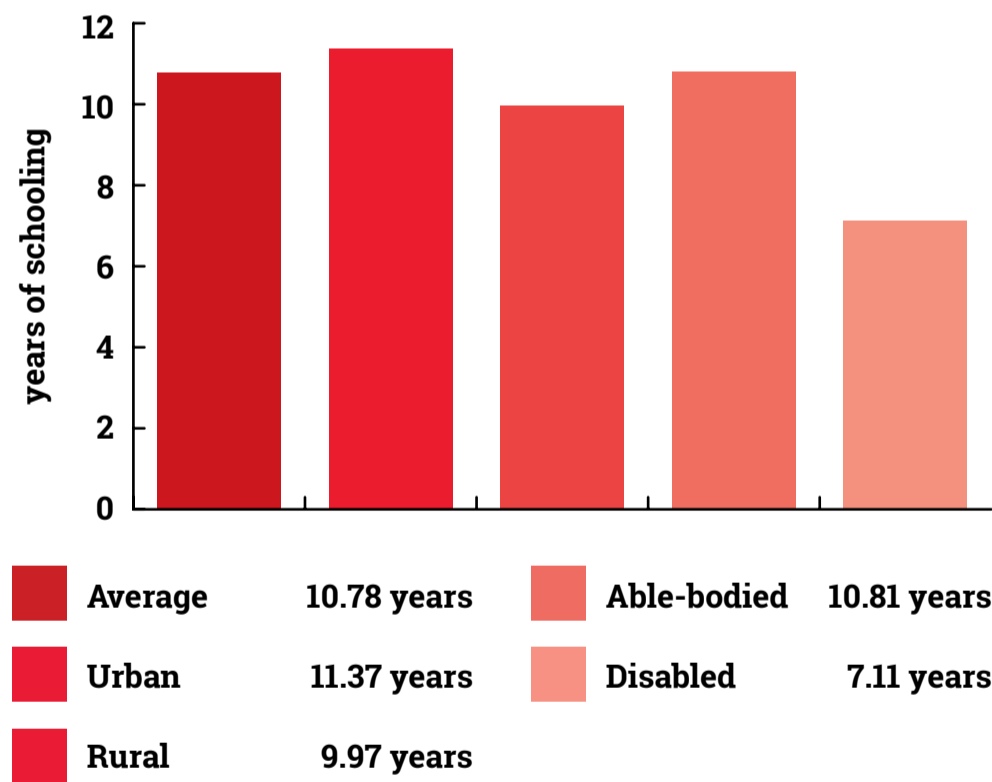


Image 3.1 Indonesian youth's years of education

Statistics Indonesia in its 2020 Youth Report noted that the average education of Indonesian youth (defined as those who are aged 16 to 30 years old) was 10.78 years or equivalent to the first year of high school. However, there was a gap between urban and rural youth, with urban dweller having more education (11.37 years) compared to their rural counterparts (9.97 years). Between able-bodied and disabled youth, the gap was even bigger with able-bodied youth having 10.81 years of schooling and disabled youth having 7.11 years of schooling.

Education of Indonesian youth:

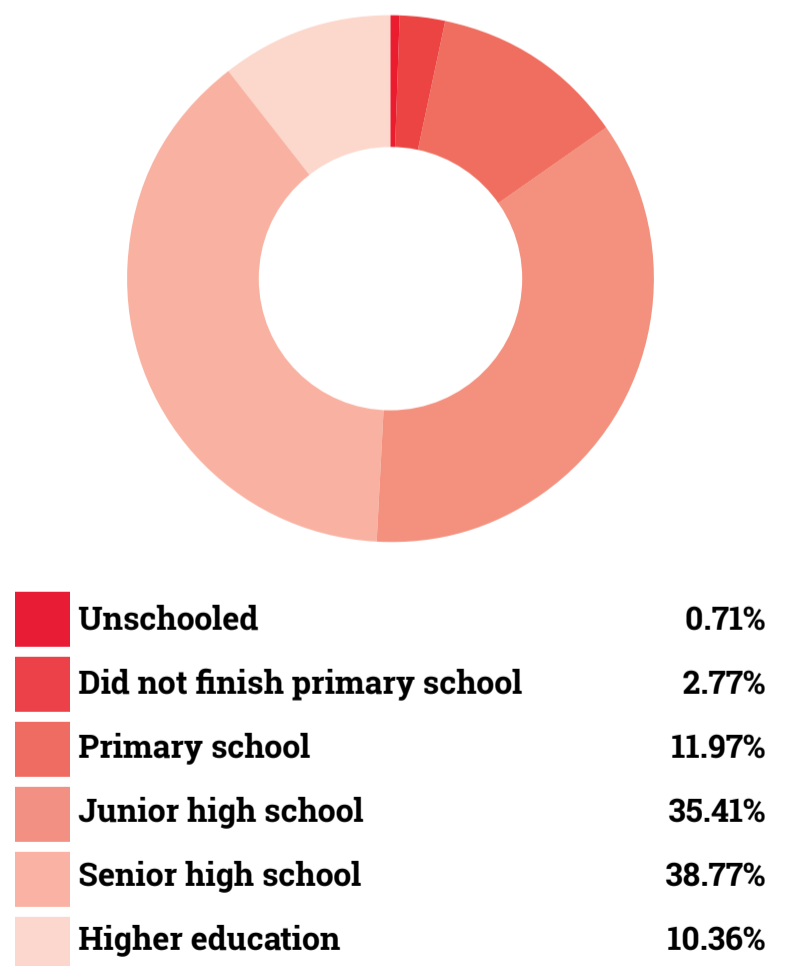
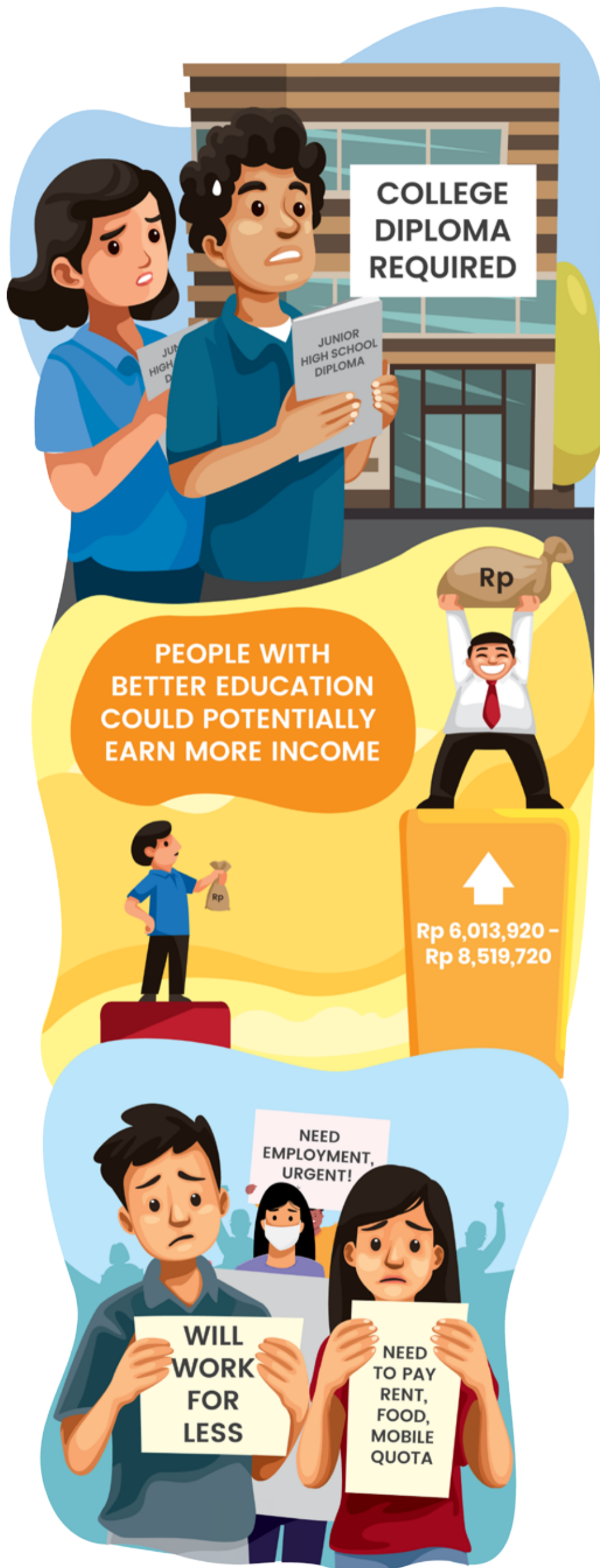


Image 3.2 Education of Indonesian youth

Source: Statistics Indonesia, 2020 Youth Report



57%



Labor force in Indonesia who had a lower-secondary education (equal to junior high school) or lower.

Image 3.3
Labor force education in Indonesia

According to the World Bank in 2021, 57% of the labor force in Indonesia had a lower-secondary education (equal to junior high school) or lower. The World Bank also noted the poor learning outcome in Indonesia, which resulted in a student obtaining less education than they should have from a particular period of schooling.

However, on top of personal issues and family's economic condition, Gen Z must also face obstacles presented by the pandemic. School and university closures had hampered their education and learning process as the students are forced to study from home, with limited assistance from their peers, mentors, and teachers or lecturers. The monotonous method of online learning also added more challenges, as students became bored, not engaged, and unmotivated to learn.

The World Bank published a research in September 2021 on Indonesian students' possible learning loss and its economic impact. Indonesian students might experience a reduction between US\$408 and US\$578 per student in future annual earnings. On the whole, the total earning loss is equivalent to 24 to 34 percent of 2020 GDP, according to the World Bank in a report titled Rewrite the future: How Indonesia's education system can overcome the losses from the COVID-19 pandemic and raise learning outcomes for all.

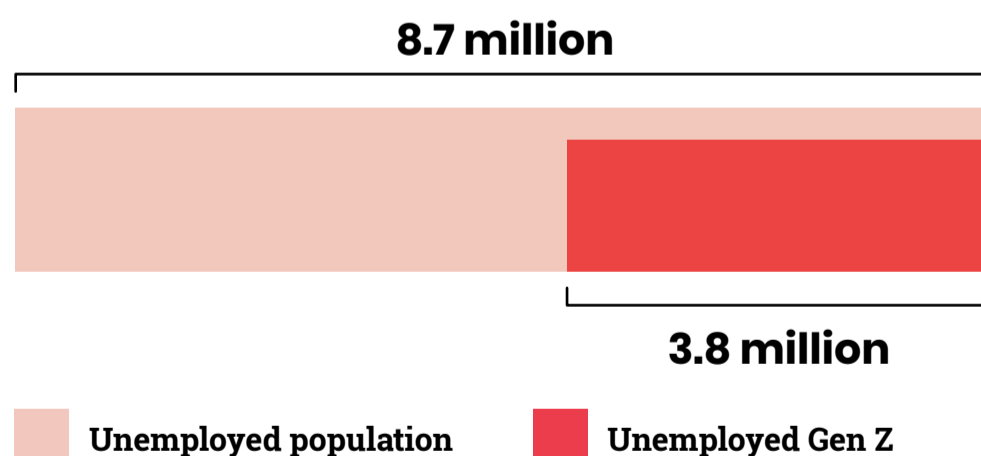


Image 3.4
The share of Gen Z in Indonesia's unemployment

According to data from Statistics Indonesia, the share of Gen Z in the country's unemployment rate is quite big. In February 2021, for instance, out of 8.7 million unemployed population, 3.8 million of whom are part of Gen Z (those who are aged 15-19 years old and 20-24 years old). This reflects the short-term impact of pandemic to Gen Z, particularly related to their career and income.

1 in 3 Gen Z are interested in online learning platform

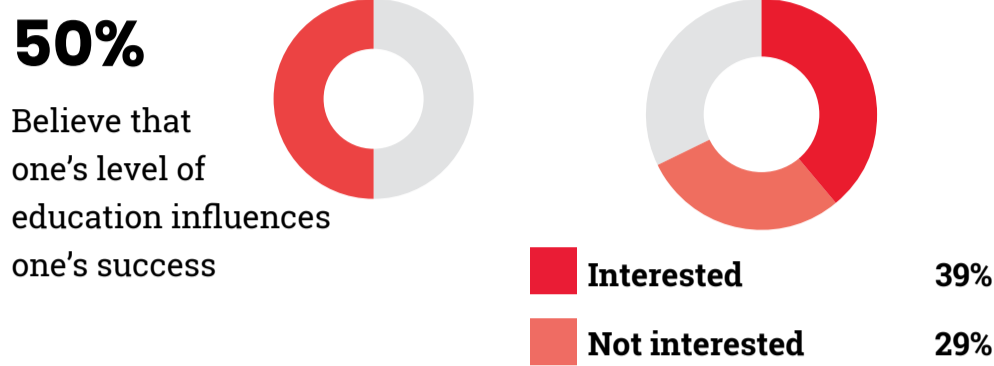


Image 3.5
Gen Z's interest in online learning platform

50% of Gen Z believe that one's level of education influences one's success. 39% of Gen Z say they are interested in learning more through online platforms, with 29% saying that they are not interested. However, only 32% of all Gen Z have tried at least one online learning platform. 44% of late teens Gen Z (aged 15 to 20 years old) say that they have tried online learning platforms, as many of them are still students who have to use at least one platform for their education. For young adult Gen Z (aged 21 to 24 years old), online learning platform is more of a perk than necessity as only 21% have tried using it.

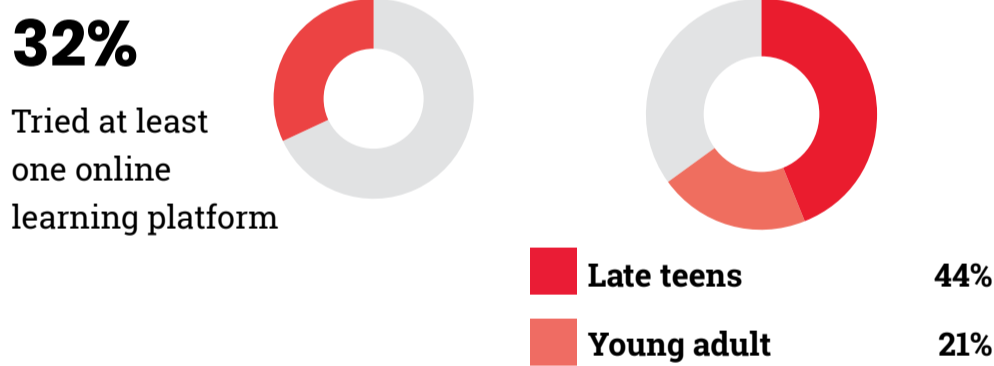


Image 3.6
Gen Z who already tried online learning platform

Untapped market: 68% of Gen Z have never used online learning platforms

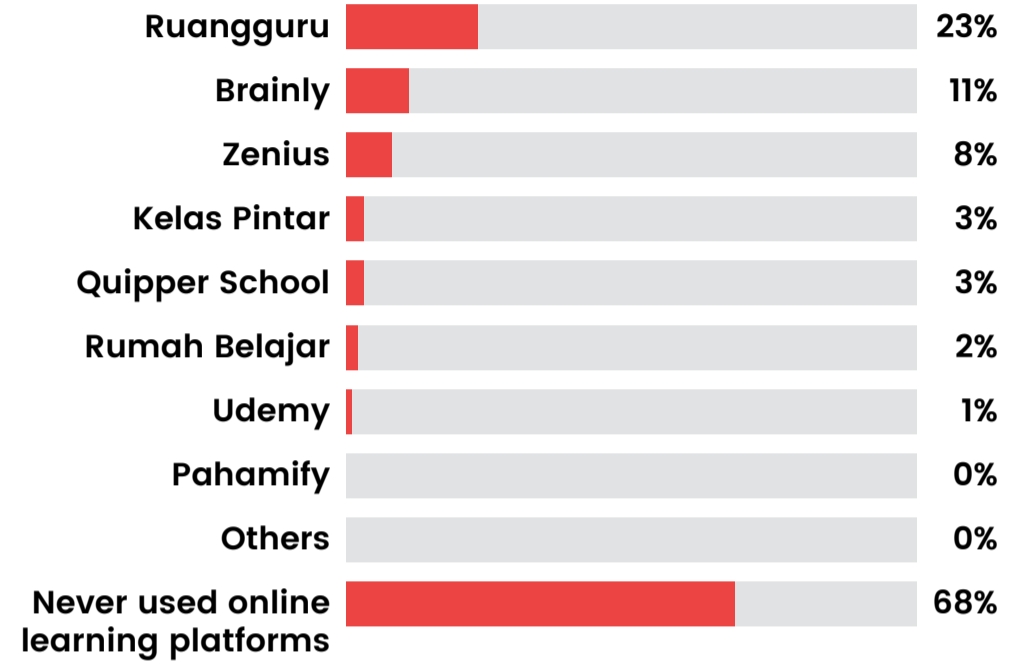


Image 3.7
Online learning platforms user

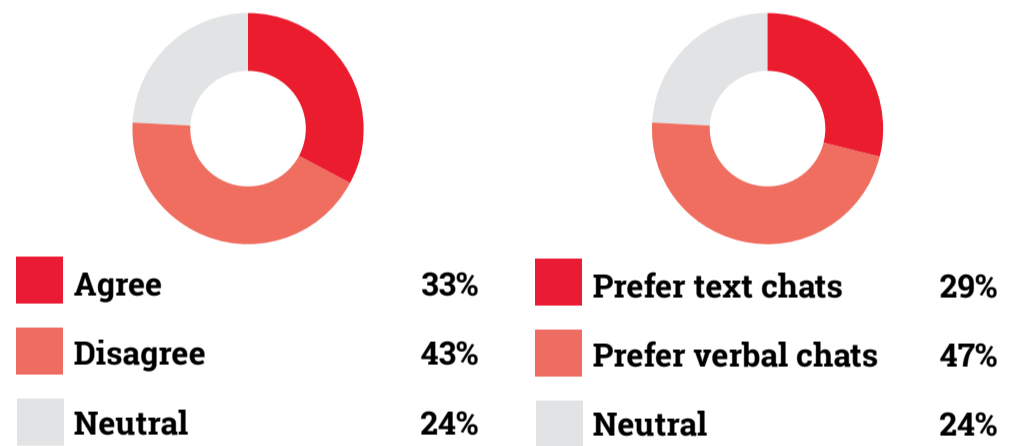


Image 3.8
Gen Z's view in person meeting today's education system.

33% of Gen Z believe that today's education system doesn't require in-person meetings, with 24% remaining neutral on this and 43% disagreeing with the view. A similar view is found among Gen Z when it comes to preference toward in person meetings. 29% of Gen Z say that they prefer to communicate via chats compared to in person meeting, while 24% remain neutral and almost half (47%) of Gen Z say they prefer in person meeting.

The pandemic might have hampered Gen Z's ability to experience life as a young adult, especially when it comes to having social interaction and building meaningful networks or relationships at school, university, workplace, or other settings.

Based on data from IDN Media, Gen Z are taking it to the internet to learn social skills. One article that is read by many Gen Z is tips on how they can get to know more people, meaning that social interaction is a skill that they have to learn from external sources instead of a natural ability.

Ruangguru tops the list of online learning platforms among Millennials. The platform gained massive growth after it became one of the providers in *Kartu Prakerja* (Pre-Employment Card Program) catering to unemployed workers who faced difficulties in finding jobs or were laid off due to the pandemic-induced economic crisis.

Unlike the popular belief, Gen Z are willing to put in the hours to get ahead in their career



One criticism that older generations often have for Gen Z is that they are lacking grit and determination at work. The stereotype is that Gen Z wants to have it easy, instead of pushing themselves and trying to be better. We find that the criticism might be based on one or two bad apples instead of representing the actual attitude among Gen Z.

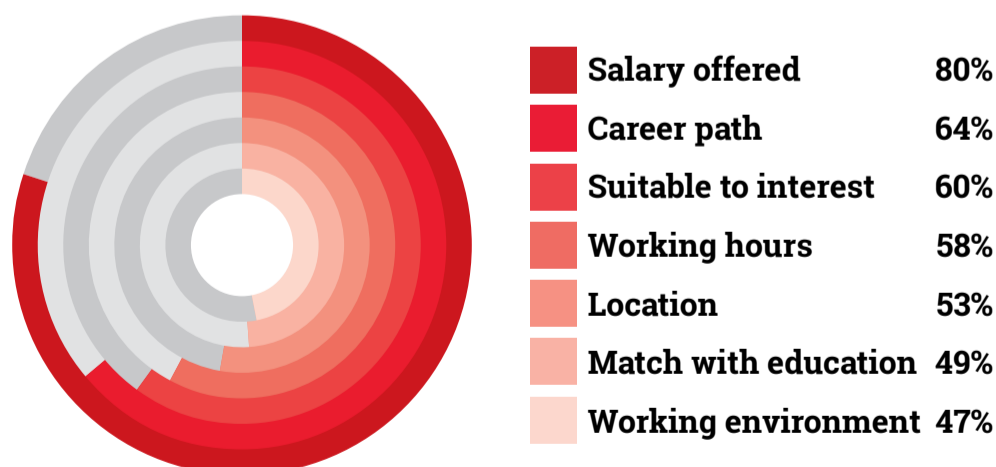


Image 3.9
Important factors Gen Z's consider when choosing a job

Almost 2 in 3 Gen Z (64%) consider a career path as an important factor when they are looking or choosing a job. Career path becomes Gen Z's second priority after salary offered (80%), and it is considered more important than suitability to one's interests (60%), working hours (58%), location (53%), match quality with one's education (49%) and work environment (47%).



Image 3.10
Gen Z's view on working longer hours

67% of Gen Z also say that they don't mind working longer hours as long as they are paid more, with only 11% refusing to do so. This shows that Gen Z don't mind putting in more effort at work, as long as they receive fair compensation for that. Data from Statistics Indonesia, published in August 2021, shows that Gen Z are working longer hours with lower wages compared to their Millennial counterparts.

Generation	Average working hours per week	Average monthly wage
Late teens Gen Z (15-19 years old)	44 hours	Rp 1.500.000
Young adults Gen Z (20-24 years old)	42 hours	Rp 2.100.000
Junior Millennials (25-29 years old)	40 hours	Rp 2.400.000
Senior Millennials (30-34 years old)	40 hours	Rp 2.600.000

69%

Must have a work-life balance



5%

Disagreeing with the statement



Image 3.11
Gen Z's view in work-life balance

Interestingly, 69% of Gen Z say that they must have a work-life balance, with only 5% disagreeing with the statement. In short, Gen Z do have what it takes to succeed at work. The question is: can the workplace adjust to Gen Z's need for fairness and work-life balance in order to retain them and allow them to flourish?



36%
Prefer working from home

33%
Prefer working from office

32%
Neutral

Image 3.12
Importance of workplace location

Location of a workplace might be important because only 36% of Gen Z say that they prefer working from home, with 32% remaining neutral and 33% disagreeing with the statement. As most of Gen Z are still starting their careers, perhaps it's important for them to work at the office to learn more about the work and to build networks or have interactions with their seniors or mentors.

An overwhelming majority of Gen Z (88%) believe that an ideal length to stay at one job is at least three years, with 12% saying that the ideal length is 1-2 years. This is in accordance with their view toward a steady career path, which might be understood as one of Gen Z's ways to have a solid ground in life considering the turbulent times they are living in.

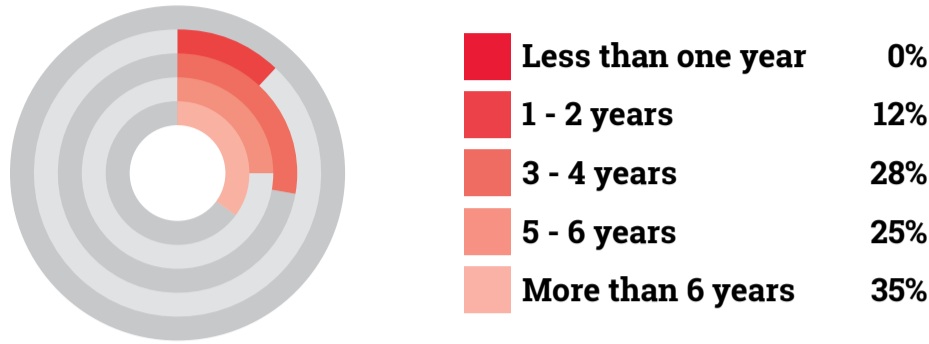


Image 3.13
Gen Z's ideal length to stay at one job

52%

Multinational companies is more secure



12%

Disagree with the statement



Image 3.11
Gen Z's thoughts on multinational vs. domestic companies

When it comes to stability, 52% of Gen Z say that working at multinational companies is more secure compared to domestic ones. Only 12% actually disagree with the statement. This view is probably influenced by the fact that in the first months of the pandemic, 29.12 million workers were laid off, furloughed, or having difficulties in finding a job due to COVID-19 induced crisis.

What jobs & profession are Gen Z interested in?

64% of Gen Z are actually interested in becoming an entrepreneur. Those from the lower socio-economic class are particularly eager to be one, perhaps due to the fact that entrepreneurship offers bigger payoff compared to having regular –mostly blue-collar jobs– for the poor Gen Z.

As Indonesia has a large consumer base, consumer-oriented jobs like marketing, transport, media, and public relations become top jobs that Gen Z are interested in.

Computer Science becomes the second most sought-after job for Gen Z, but the interest for this type of job increases as one socio-economic level becomes higher too. Perhaps, this is a reflection of both the education gap and ownership of tools that support computer science jobs across Gen Z in Indonesia.

Most popular entrepreneurs are chefs who have culinary businesses too, according to data from IDN Times.

Jobs	Rank	Upper	Middle	Lower
Marketing	1	34%	28%	29%
Computer Science	2	35%	24%	18%
Media	~3	19%	22%	18%
Public Relations	~3	21%	21%	22%
Transport	~3	15%	22%	18%
Finance	6	13%	17%	16%
Logistics	7	22%	16%	13%
Human Capital	8	21%	13%	18%
Journalism	9	9%	15%	7%
Health	10	17%	13%	8%
Research	~11	14%	7%	8%
Pharmaceutical	~11	13%	7%	8%
Legal	13	8%	5%	5%
Food/Culinary	14	1%	1%	1%



Chef Juna



Chef Renata Moeloek



Tasya Farasya



Betting on FYP (for you page): Social media influencer as an actual career

The omnipresence of social media in Gen Z’s lives, which become ever more palpable amid the pandemic, might influence Gen Z’s perception toward social media as an actual platform for work. No longer is social media purely social, as it can also be utilized as a source of income or to gain a network that allows Gen Z to pursue entrepreneurship in other forms.

After management skill, digital skill and public speaking are considered by Gen Z as important skills that will support one’s career. While management skill has long been accepted as a necessity in corporate world or any other workplace and the increasing significance of digital skill is due to our technologically advanced society, the rise of public speaking can be due to the fact that Gen Z are more used to hearing and seeing presentable form of communication in social media or webinars.

While before, one’s work performance can speak for itself, nowadays people have to be able to present themselves coherently in order to seize attention from a wider audience in social media.

What skills do Gen Z consider important for their career?

Skills	Upper	Middle	Lower
Leadership	59%	61%	48%
Public Speaking	61%	62%	57%
Management Skill	75%	72%	66%
Bilingual	59%	49%	38%
Digital Skill	63%	64%	49%



Awkarin

The 1997-born social media influencer became famous for being a girl who cries over a breakup in a YouTube video, but Awkarin capitalized on the overnight fame by obtaining a lot of paid endorsement, before building her own social media influencer management called A Team Management. She even tried starting a career in music for a brief period.



Jerome Polin

Jerome Polin is another Gen Z who has made a career out of social media. Jerome gained a huge following on YouTube with Nihongo Mantappu channel, where he shared his daily life as a university student majoring in Math in Japan. In 2021, he launched a culinary business selling tea under the brand Menantea (a pun of *Menanti* or waiting in Indonesian language).



Sisca Kohl

There’s also Sisca Kohl, whose TikTok videos become an instant hit due to the sheer weirdness of the content. Sisca with her sister likes to try out various extravagant foods or turn regular food such as *Nasi Padang* into ice cream. She’s known for her catchphrase, “*Mari kita coba*” (Let’s try!).



MEDIA CONSUMPTION

 **- AND -** 
ONLINE
BEHAVIOR



Conventional TV still reigns even among Gen Z



Meanwhile, cable TV use is concentrated in several big cities only and among the upper and middle SEC. The low penetration of cable TV is due to low accessibility in terms of location and price, which makes it exclusive to the upper and middle SEC who might live in more urban areas with better digital infrastructure and have more disposable income.

Gen Z who still listen to radio:

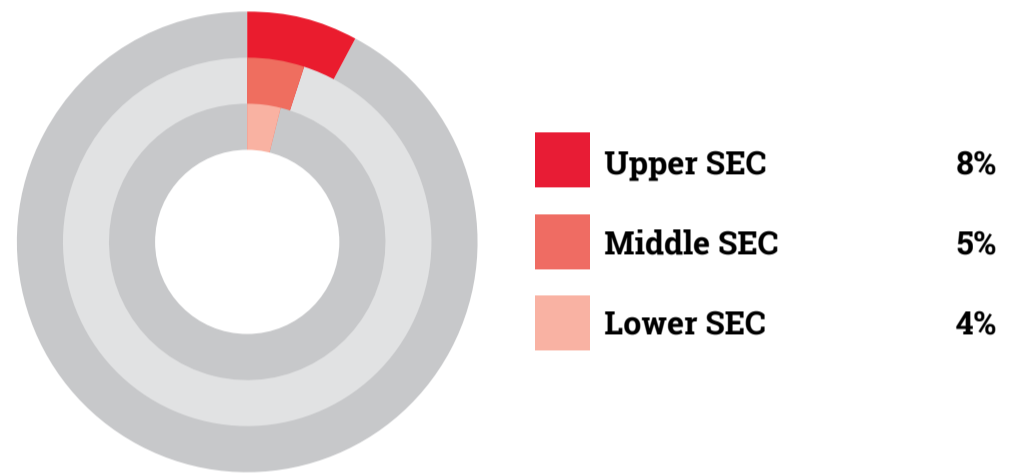


Image 4.2
Gen Z who listen to radio by SEC

Our findings also find that radio use is more prevalent among those from upper SEC with 8% use compared to middle and lower SEC with 5% and 4% use. This is probably due to a behavioral pattern, as people listen to radio while driving.

82%
Gen Z who have watched conventional TV in the past month



While streaming platforms have gained popularity in social media, 82% of Gen Z say they have watched conventional TV in the past month. This is true across all socio-economic classification, age, and gender groups, with a slight decrease among the lower SEC.

Image 4.1
Gen Z who watch TV

Cable TV penetration:

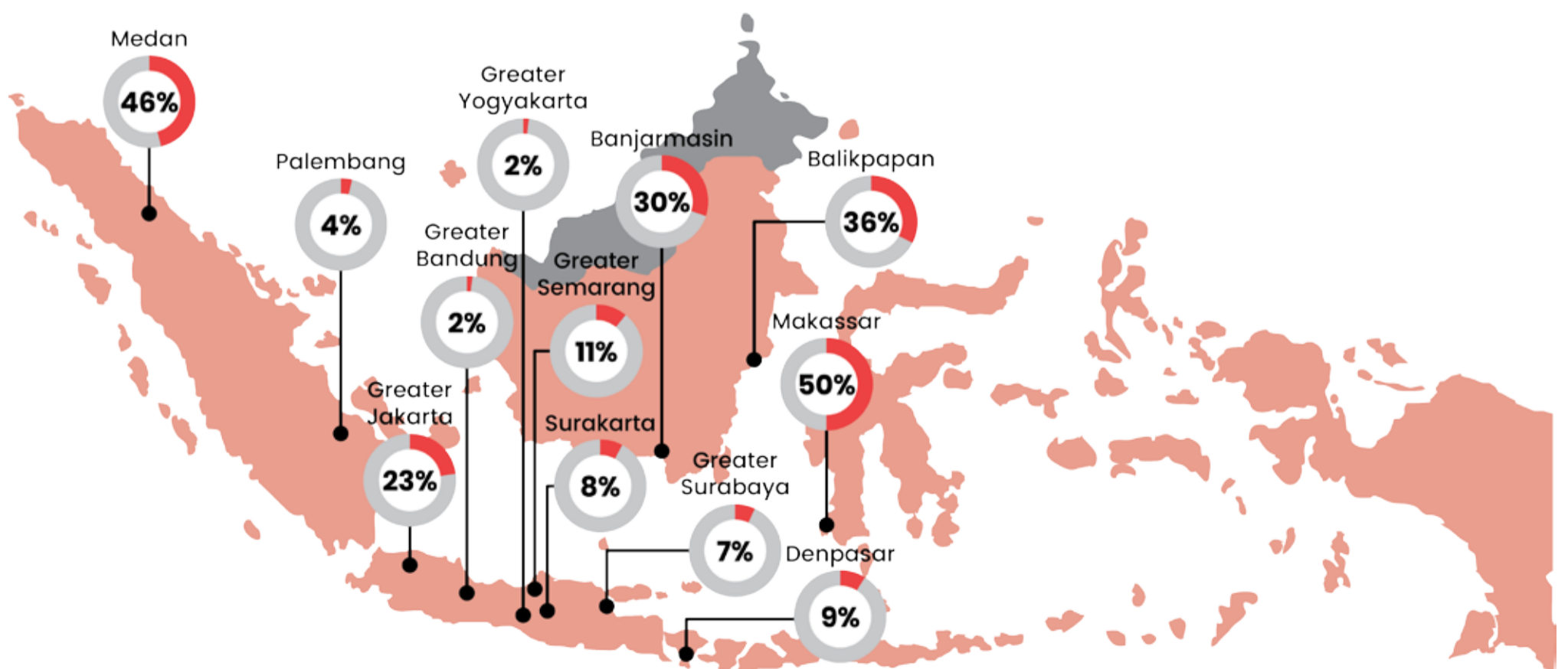


Image 4.3
Cable TV penetration in big cities

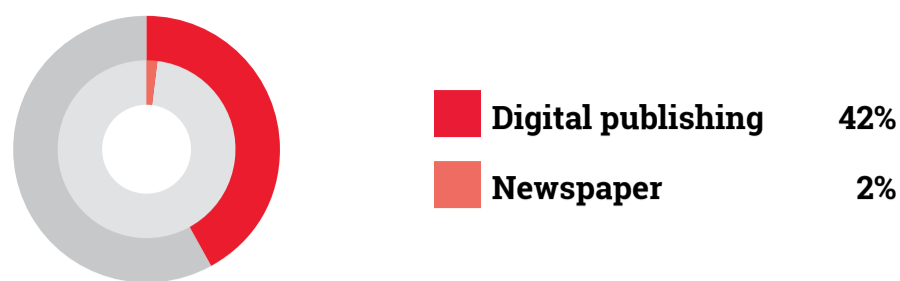


Image 4.4
Accessed media among Gen Z

Digital publishing becomes the second most accessed media among Gen Z after conventional TV, with 42% of Gen Z reporting that they have used digital media outlets in the past month. Newspaper use is only at 4%, with readership concentrated only among the older Gen Z (aged 21 to 24 years old). The shift from conventional to digital media has resulted in the decision from major legacy media outlets in Indonesia to reduce their print production or stop it altogether.

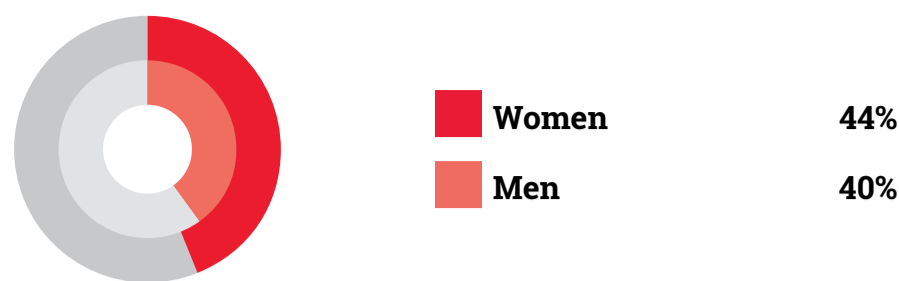


Image 4.6
Digital media accessed by gender

More women (44%) access digital media compared to men (40%), which makes digital media use slightly gendered, although in reverse to the trend among Millennials. This can be taken as a good sign and might be beneficial in ushering a more gender balanced newsroom as the media industry in Indonesia nowadays is dominated by male, both in the newsroom and in the news reports – with more male experts cited or featured in panels compared to females.

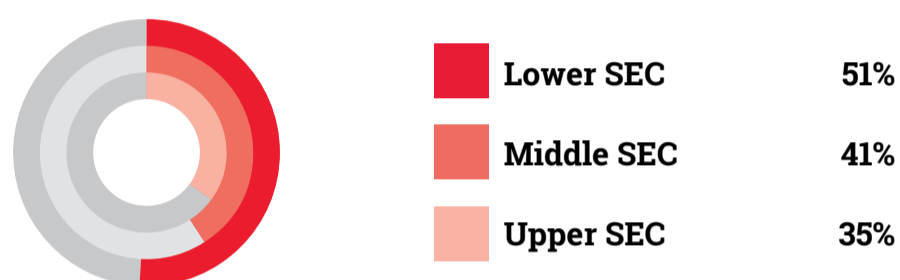


Image 4.5
Gen Z who access digital media by SEC

We find that more Gen Z from lower SEC access digital media outlets (51%) compared to those from upper and middle SEC (35% and 41% respectively). Upper SEC Gen Z also still read magazines, even though at a lower rate compared to digital media and newspaper use. Perhaps, magazines speak more about status symbols and connection compared to its informational purpose.

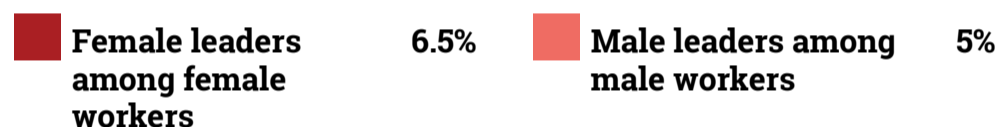
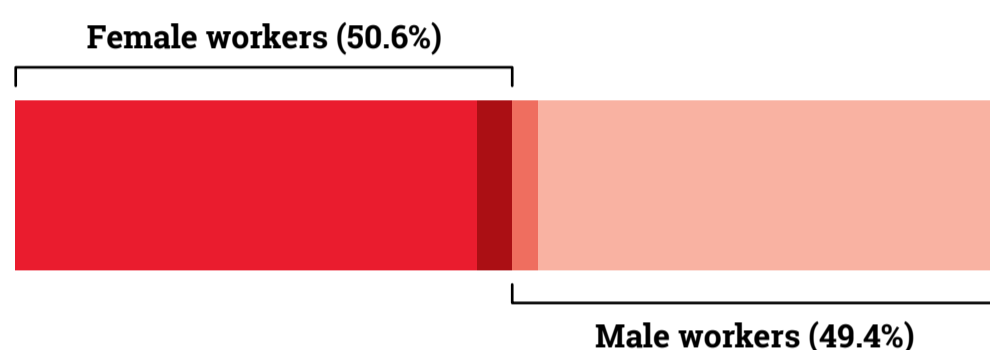


Image 4.7
IDN media workers by gender

IDN Media has achieved gender equality in the company, with 50.6% female workers and 49.4% male workers. 6.5% of all women workers hold leadership position (managerial level and above), compared to 5% of all men workers. Women’s representation in the newsroom helps reduce male-centric reporting and gender bias as well as increasing the amount of female-related stories that the media produces. IDN Media has at least three websites with female readers as their main audience: Popbela.com (pop-culture and lifestyle content), Popmama.com (parenting), and Yummy (food and recipes).



Digital publishing beats newspaper

Entertainment first.

News is optional and not mandatory for Gen Z

When asked about what topics they look for when they read digital media outlets, Gen Z shows a strong preference for entertainment and lifestyle content compared to hard news.

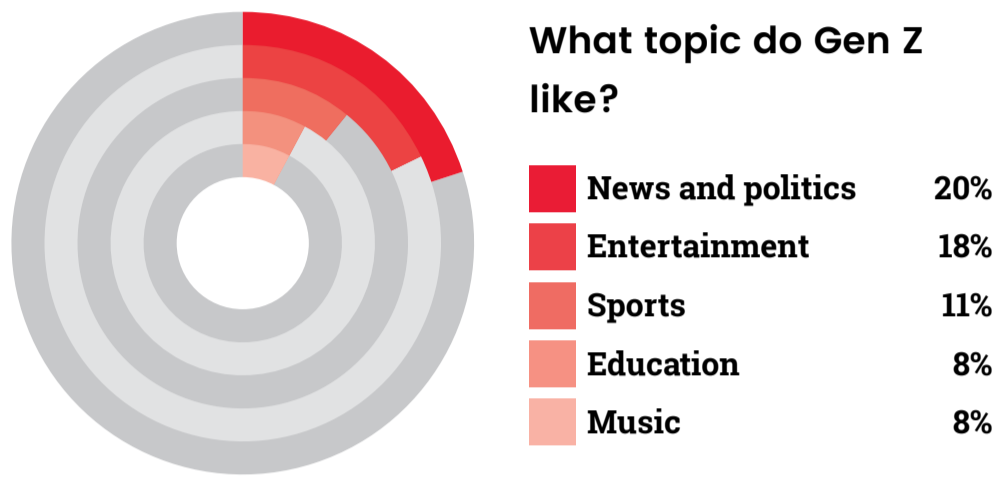


Image 4.8
Topic preferred by Gen Z

Our finding shows that news and politics readership is concentrated among the older Gen Z (24%) compared to younger Gen Z (14%). Across socio-economic class, news readership is concentrated among the middle class compared to those from upper and lower SEC.

Some content is more gendered than others. We find a noticeable difference in digital media consumption among male and female Gen Z. Women are more likely to be interested in content related to food or culinary, fashion, travel, education, and entertainment news in general. Men are more likely to be interested in music, sports, technology, and automotive-related content.

What do Indonesian Gen Z do online?

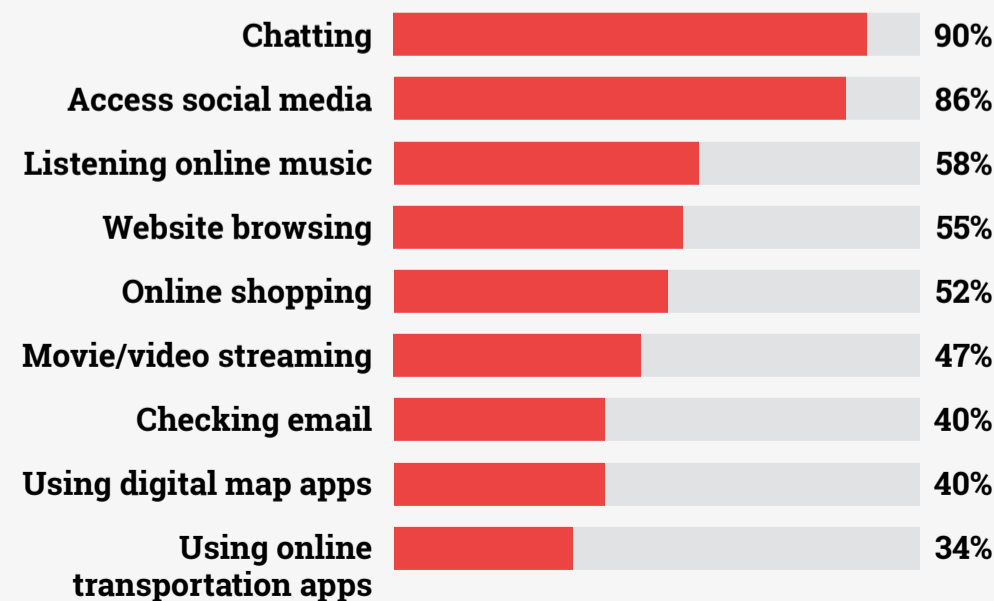


Image 4.9
Online activity of Indonesian Gen Z

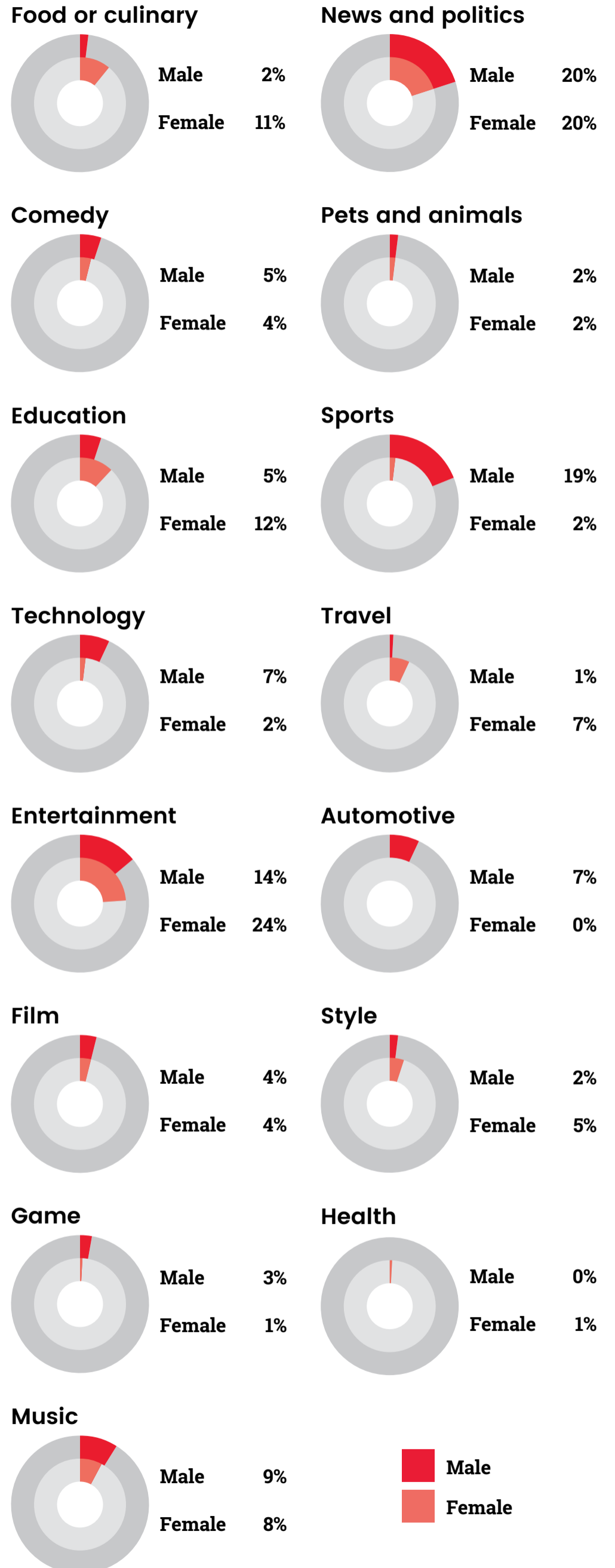


Image 4.10
Topic preferred by gender

Leading the mobile revolution with WhatsApp and social media

Device used for internet access:

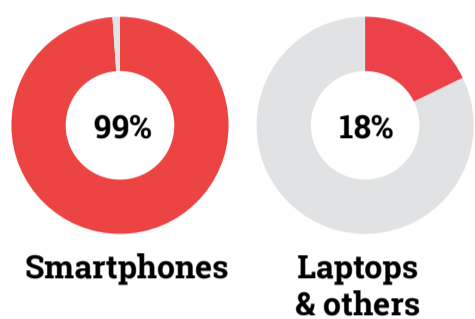


Image 4.11 Device used for internet access

Internet penetration in Indonesia:

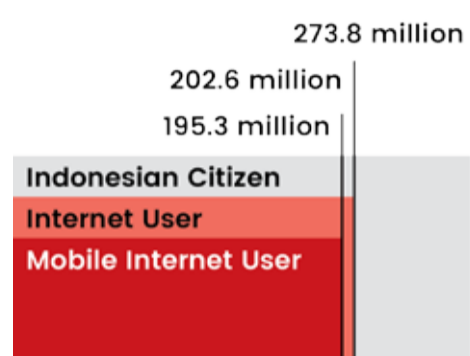


Image 4.12 Internet penetration in Indonesia

Messenger application used by Gen Z:

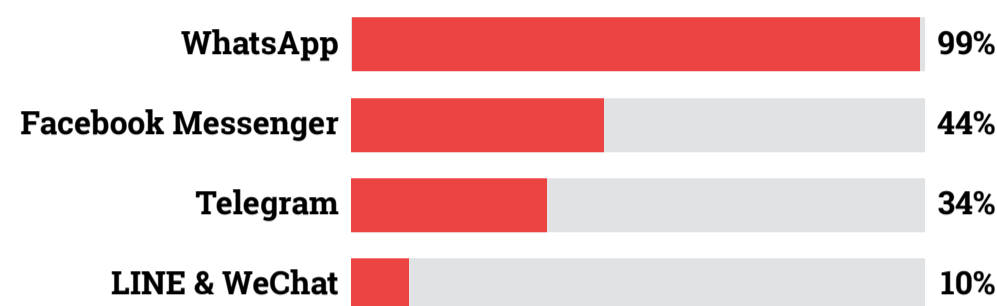


Image 4.14 Messenger application used by Gen Z

Smartphones are used by 99% of Gen Z to access the internet, compared to 18% who use laptops and a few other various devices. In 2021, internet penetration in Indonesia reached 74% or 202.6 million users, with mobile internet users taking up most of the bulk with 195.3 million users, according to data from We Are Social and Hootsuite: Digital 2021 Indonesia.

Since Indonesian Gen Z rely on mobile devices for their digital activities, choosing the right providers is key. 76% of Gen Z say that they are unwilling to switch their provider, which reflects either strong brand loyalty or convenience due to limited coverage of some providers in the selected area.

Chatting and social media are the top two online activities among Indonesian Gen Z when they go online. Messenger applications practically replace traditional SMS as a means of communication among Gen Z, with 99% of Gen Z using WhatsApp, followed by Facebook messenger (44%) and Telegram (34%). Japanese messenger app LINE and Chinese WeChat are only used by 10% of Gen Z in our survey, mostly by older Gen Z, despite their hegemony in their origin country.

The majority of Gen Z spend more than one hour daily on social media apps, with more than a quarter saying that they spend more than three hours daily. The figure might be rising amid the pandemic as Indonesia is still facing restrictions, although looser than the previous two years.

Telkomsel remains the top provider for Gen Z. Post-paid services are only used by a minority (4%) of Gen Z.

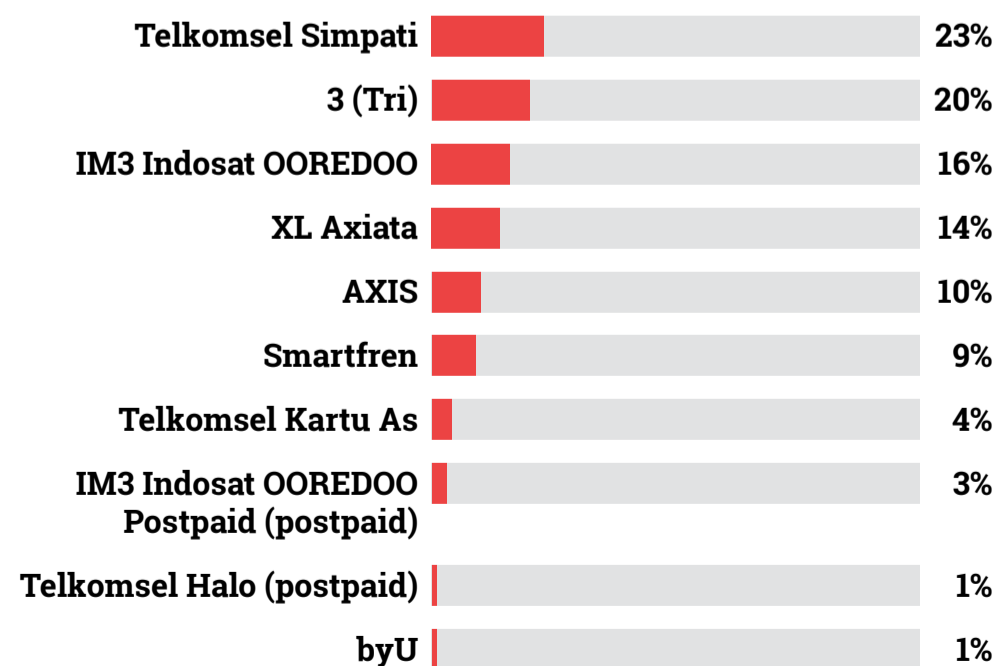


Image 4.13 Providers used by Gen Z

Tick tick scroll! Indonesian Gen Z and daily social media use

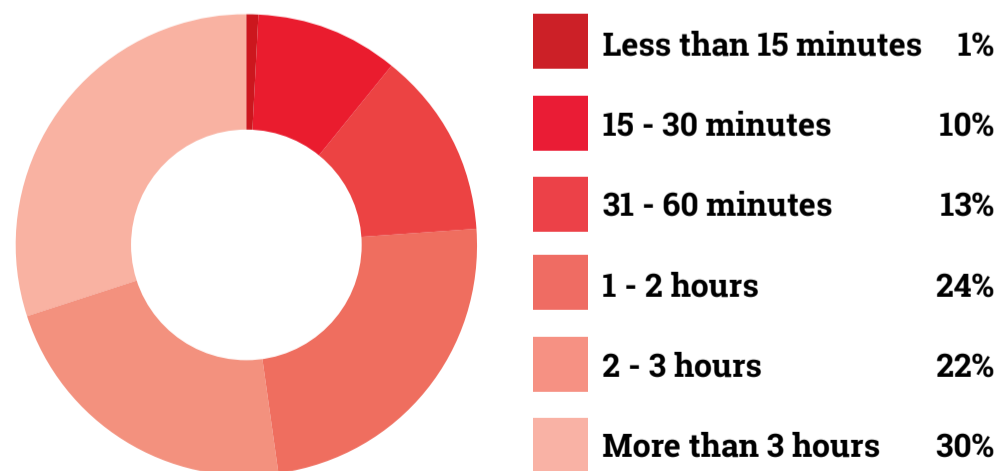


Image 4.15 Daily social media usage for Indonesian Gen Z

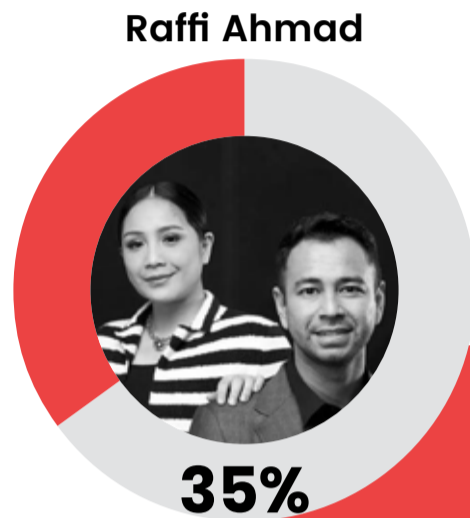
We ask the Gen Z about social media influencers that they like, and it turns out that the figures that Indonesian Gen Z like are a mix between social media homegrown influencers and former TV celebrities turned influencers.

The top 5 names in our surveys share a commonality: They all have a growing YouTube account which showcases their personal lives. All these figures manage to have strong fan bases by creating parasocial relationships in which they invite their fans into their homes and family.

Celebrity turns into influencers: YouTube is key

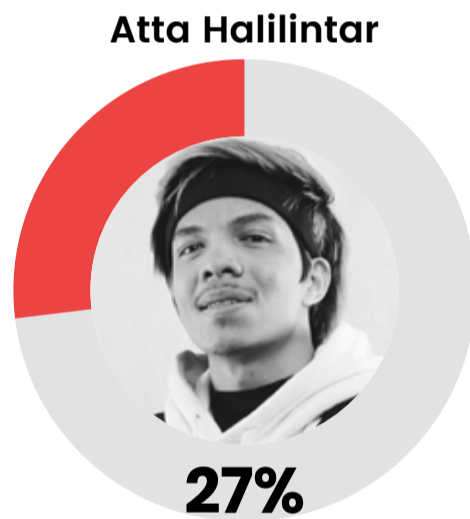


Raffi Ahmad and Nagita Slavina, a celebrity couple, have 60 million followers on their joint Instagram account @raffinagita1717 and 23 million subscribers on YouTube under Rans Entertainment.

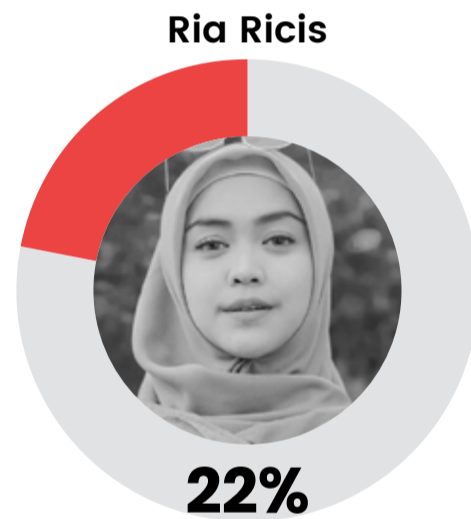


Top social media influencers for Indonesian Gen Z

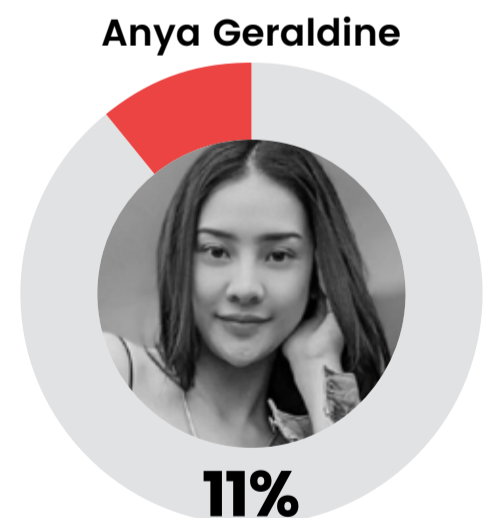
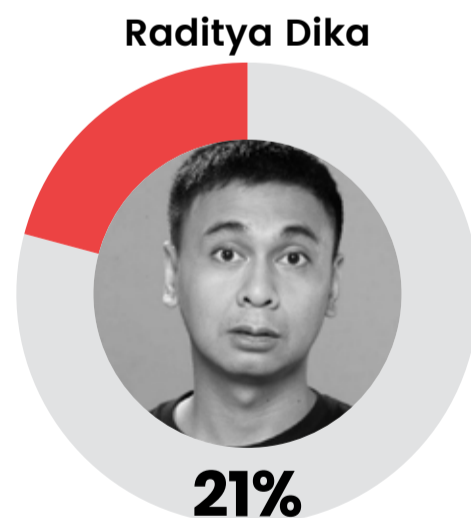
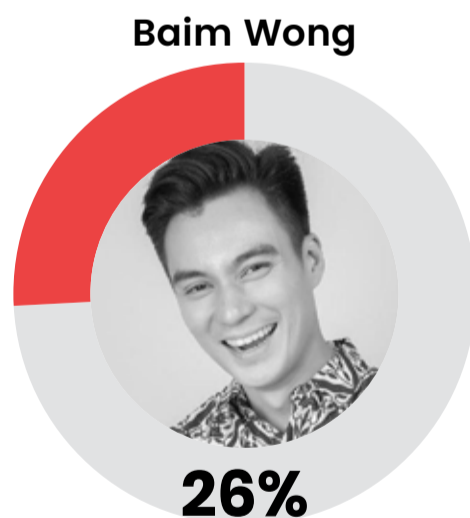
Atta Halilintar, who is now married to Indonesian celebrity Aurel Hermansyah, has 29 million subscribers on YouTube.



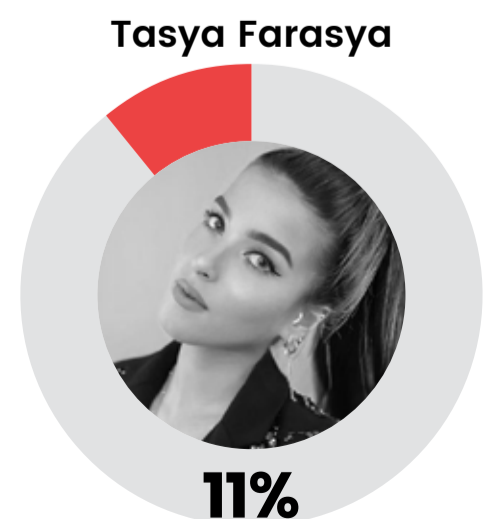
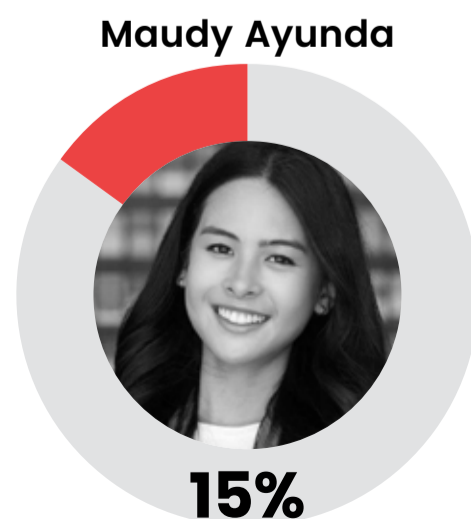
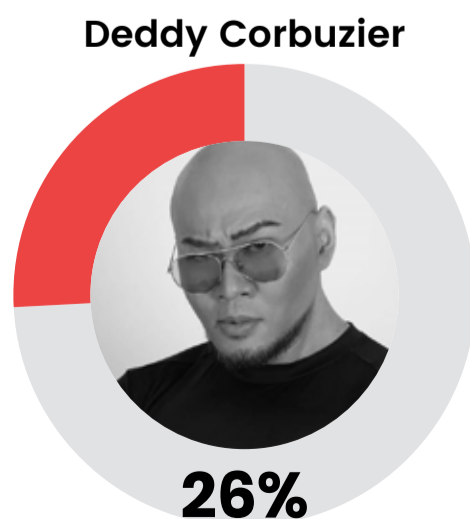
Ria Ricis has 29 million subscribers on YouTube.



Baim Wong, formerly known as an actor, has 17 million followers on Instagram and 20 million subscribers on YouTube.



Deddy Corbuzier, formerly known as a magician, has 18 million subscribers on his YouTube, where he hosts the Close the Door podcast. Deddy interviews various public figures and even government officials and ministers on the video-podcast.





The rise of short video: TikTok, Instagram Reels, and YouTube Shorts

40%

Gen Z who uses Tiktok on daily basis



Image 4.18 Gen Z who uses TikTok daily

Social media used by Gen Z

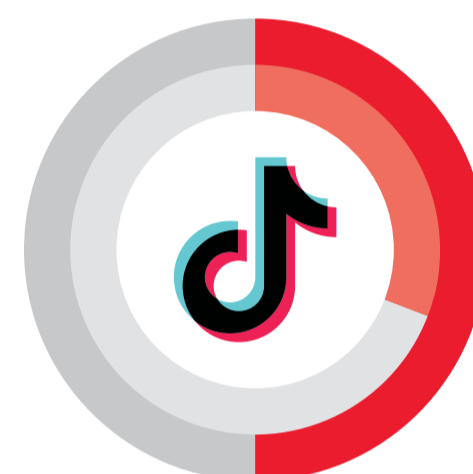
Instagram	74%	Snapchat	1%
YouTube	59%	LinkedIn	1%
Facebook	56%	Pinterest	1%
TikTok	40%	Not using any	1%
Twitter	9%		

Image 4.16 Social media used by Gen Z



Younger Gen Z 43%
Older Gen Z 36%

Image 4.19 Tiktok user by age



Female user 50%
Male user 31%

Image 4.20 Tiktok user by gender

74%

Gen Z who uses Instagram on daily basis



Image 4.17 Gen Z who uses Instagram daily

3 in 4 Gen Z (74%) uses Instagram daily. This is in line with the trend in the US where teens and young adults prefer Instagram over Facebook, as the latter is more synonymous to old people's social media. For Gen Z, Instagram's purpose is not only social (showing a curated person of one's life and having social interaction on the platform) but also for discovery and as a shopping platform.

YouTube follows Instagram as the most popular social media among Gen Z. Some internet providers in Indonesia offer extra or free quota for YouTube, which helps explain its popularity despite video being a data-heavy media. Known as video streaming platform, YouTube has now developed more social features such as allowing users to post text and photos in their feed and introduced "Shorts" to stay relevant amid the success of TikTok.



Upper SEC 32%
Middle SEC 40%
Lower SEC 44%

Image 4.21 Tiktok user by SEC

TikTok is rising as a serious contender against Instagram, with 40% of Gen Z accessing TikTok on a daily basis. Among Indonesian Gen Z, TikTok is more popular for younger Gen Z (43% compared to older one at 36%), lower socio-economic status (44% compared to upper at 32% and middle at 40%), and female (50% compared to male at 31%).

It's safe to say that TikTok is challenging Meta's dominance over how people spend their time and attention. The Chinese-owned social media's growth has even been mentioned by Mark Zuckerberg himself and in internal documents known as the Facebook papers.



NOW LIVE: Gen Z are tuning in for video and live streaming

The popularity of Instagram, YouTube, and TikTok is due to Gen Z's preferences over video-based content and livestream content. There are also several livestreaming-focused platforms such as IDN Live, Bigo, Discord, and Twitch. While Bigo is known for its vulgar content, the rest are more popular in the gaming community as professional or famous players like to stream their playing sessions on the platform.

Despite originally being built as a photo-sharing platform, Instagram has now developed more video-focused features, namely IGTV (for long-form video) and Reels (for short video). Instagram also has a livestreaming feature, named IG Live, which is now utilized as more than a platform for social interaction but also as an alternative to Zoom webinars and as a commercial platform.

Types of content that Gen Z like:

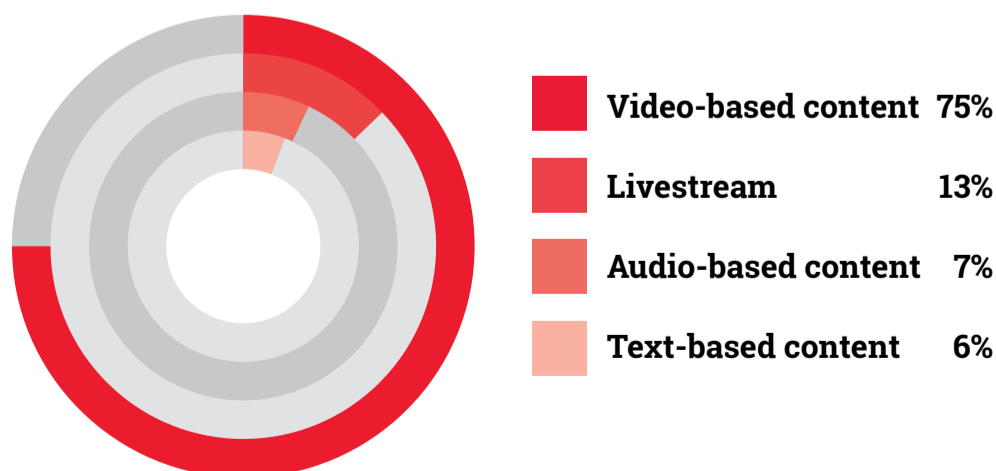


Image 4.22
Content preferred by Gen Z

TikTok has taken social media commerce to a new level with TikTok Live and TikTok Shop. If Instagram users have to conduct the actual transaction outside the social media platform, TikTok Shop makes it possible for all commerce activities to take place within its ecosystem.

Live Streaming is not exclusive to social media platforms. Content super-app such as IDN App now have a Live feature, allowing content creators to share their content real time with an audience that can reward the streamer with virtual gifts. E-commerce platforms such as Shopee and Tokopedia also have their own live streaming feature, allowing merchants to interact with potential consumers in real time and issuing a special promotion for the viewers too.

What Metaverse?: A far-fetched dream in Indonesia

After Facebook (currently Meta) founder Mark Zuckerberg announced the company's change of name and direction to focus on metaverse, the word became the latest buzzword in practically the whole internet.

However, the metaverse remains a distant concept in Indonesia. Despite the high rate of internet penetration, most Indonesians only rely on smartphones on a daily basis while the use of more advanced gadgets such as VR is still limited.



26%

Agree that metaverse can replace real-world interaction



Gen Z who agree that metaverse can replace real-world interaction



Upper SEC	34%
Middle SEC	24%
Lower SEC	29%

Image 4.23
Gen Z who agree that metaverse can replace real-world interaction

As with other technologies, metaverse is more familiar to those in the upper socio-economic class compared to others. For instance, while in general only 26% of Gen Z agree that metaverse can replace real-world interaction, the rate is noticeably higher among the upper SEC (34%) compared to middle (24%) and lower (29%) SEC.

21%

Agree that metaverse is exclusive



21% of Gen Z even agree that metaverse is exclusive, in the sense that it can only be used by certain people.



**ENTERTAINMENT
HOBBY
AND
LEISURE**





What do Gen Z like to do? It depends on money, age, and gender

More money, more leisure time, more pleasure:
The more affluent you are, the more activities you can afford and incorporate into your daily lives.

Our findings show that those from the upper socio-economic class are more likely to have more than a hobby. The affluent Gen Z are also represented in almost every activity in our list.

The affluent Gen Z, belonging to the upper socio-economic class, say they are more likely to travel domestically (20%) and internationally (2%). For those in the middle and lower SEC, the rate of domestic travel as a daily routine is only at 12% and 10% respectively.

It is interesting that almost nobody considers doing household chores and studying as a part of their routine (not even the students and housewives that make up 44% and 5% of our survey participants). Only 1% of Gen Z from lower SEC consider studying as part of their daily routine, perhaps because they feel the pressure to perform well academically in order to have better grades that will help them gain social mobility in the future.

While the interest in shopping is similar across all SEC, online shopping is more dependent on one's level of affluence. The more affluent a Gen Z is, the more likely they shop online, with upper SEC at 42%, middle SEC at 34%, and lower SEC at 24%. Although at a glance money or disposable income seems to be the most significant reason, other factors such as familiarity with e-commerce platforms and the use to digital financial services such as e-banking, mobile banking app, and e-wallet can be significant too (find deeper elaboration in chapter VI: Finance and Spending Behavior).

Activities preferred by Gen Z's SEC:

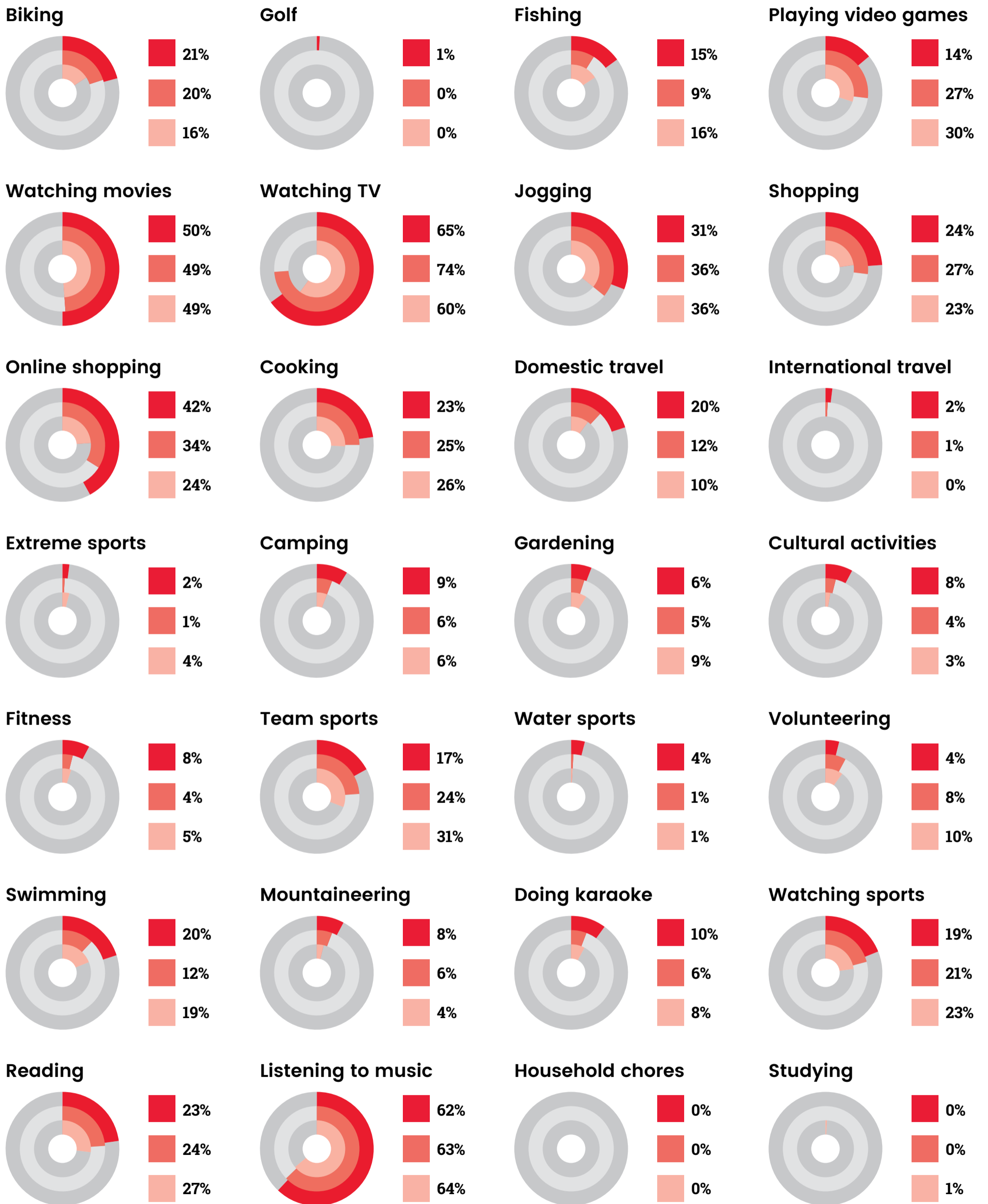


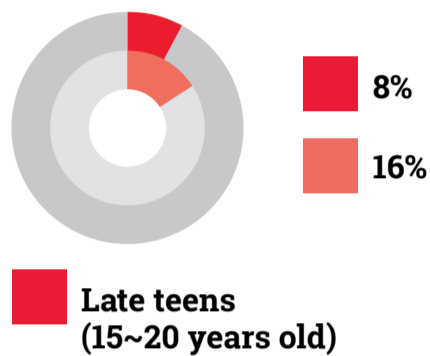
Image 5.1
Activities preferred by Gen Z's SEC

Upper SEC Middle SEC Lower SEC

World, let me introduce you to Gen Z: Young adults do more activities, enabled by their own income and freedom.

As roughly half of Gen Z in our survey are entering young adulthood and start working or living on their own, it makes sense that these young adults are exploring more compared to their late teen counterparts – who are still dependent on their parents.

Domestic travel



International travel

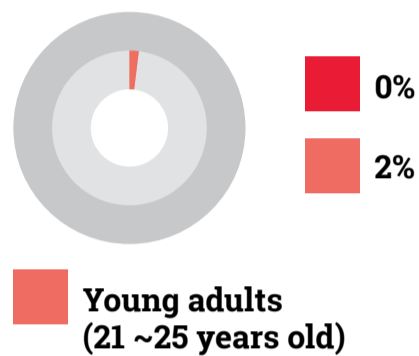


Image 5.2

Late teen vs. young adult Gen Z's travel activity

Young adults travel more compared to their late teen counterparts for both domestic travel (16% vs 8%) and international travel (2% vs 0%). The cliché goes, "When you get older you have money and energy but no time. And later when you finally have time and money, you no longer have energy," but the young adults Gen Z in our survey seem to have it all. Perhaps, it's due to the amount of financing and promotion that makes travel more affordable for young adults Gen Z.



Activities preferred by late teen and young adult Gen Z:

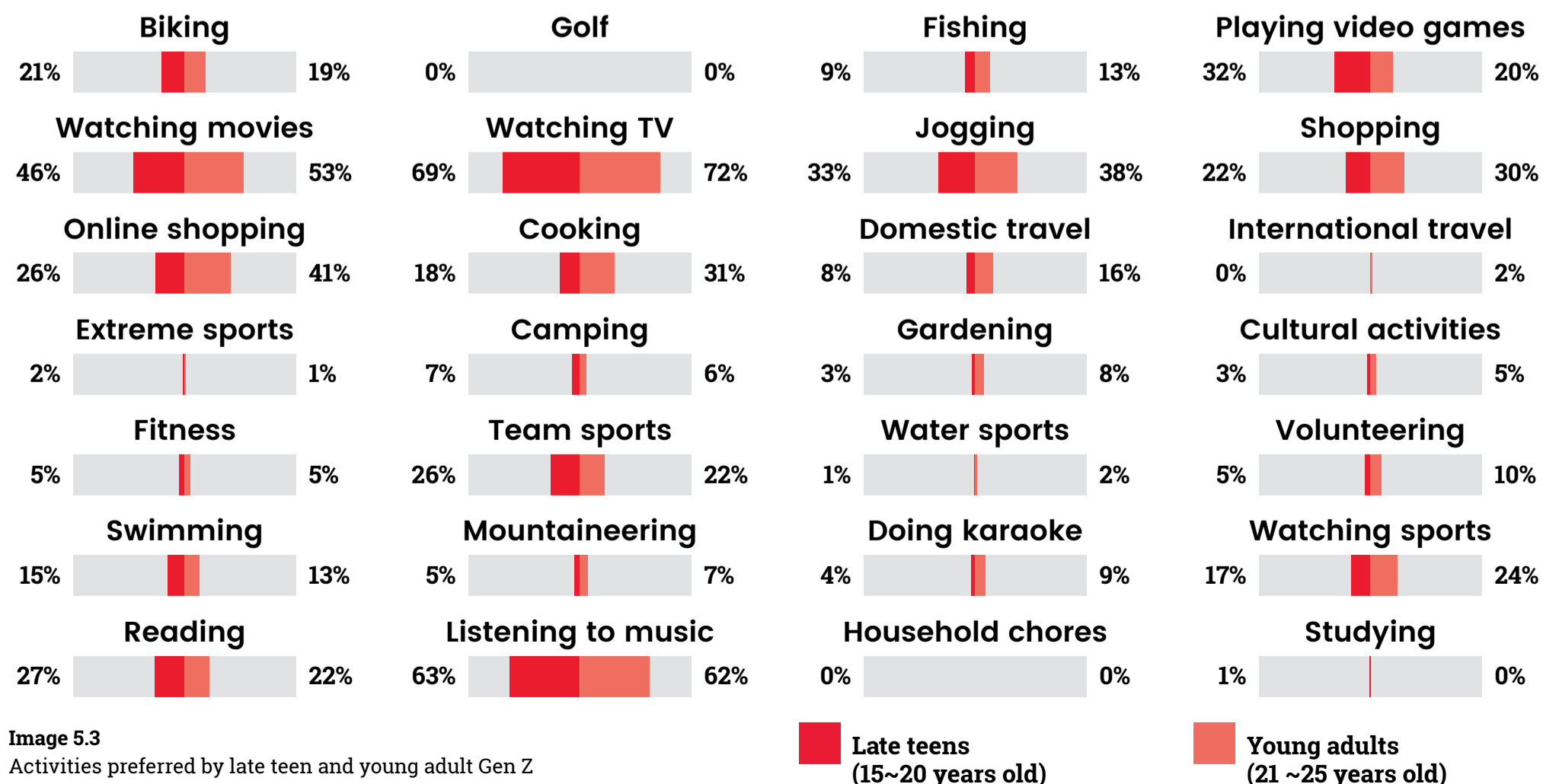


Image 5.3

Activities preferred by late teen and young adult Gen Z



Some activities are more **male-dominated** than others, such as outdoor and team sports, fishing, camping, mountaineering, and playing video games. **Female Gen Z prefer mostly indoor activities** such as watching movies or TV, shopping (both online and offline), cooking, reading, and gardening.

Even when it comes to sport, there's a noticeable difference: men are more likely to go out and exercise in a team while women choose simple exercises that can be done individually such as power walking or jogging.

Activities preferred by male and female Gen Z:

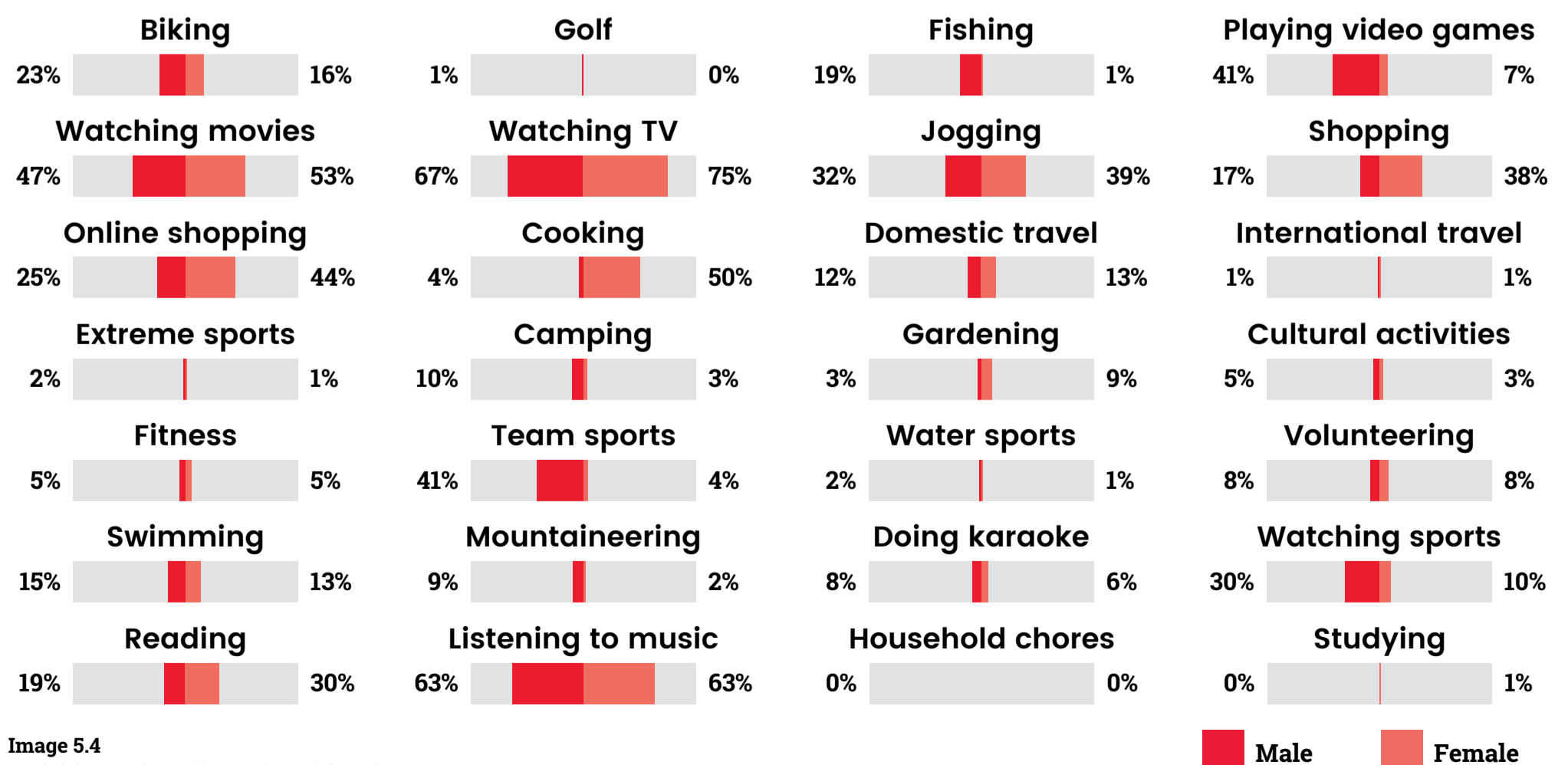


Image 5.4 Activities preferred by male and female Gen Z

Male Female

Home is where your hobbies are?

Two years into the COVID-19 pandemic, Indonesian Gen Z are taking up new hobbies that can be enjoyed at home. Our surveys find that among these new hobbies are cooking, gardening, watching movies or TV, listening to music, and even aquascaping. Due to its popularity boom, betta fish prices skyrocketed to millions of rupiah from its regular price at Rp 15,000 (about one US dollar).

These new hobbies become sort of trends that might come and go, but some remain. In the beginning of the pandemic, a lot of

people took up cycling due to gym closures and gardening due to being forced to stay at home. However, these two activities have been considered as routine now for one in four Gen Z (26%).

Activities that used to be personal like reading have transformed into a community or group activity. Due to newfound love for reading and lack of social activity amid the pandemic, some avid readers started their own virtual book clubs, like the Diversitea Book Club that is dedicated for those who are looking for more diverse reads. As these book clubs are hosted online, there is less pressure for newcomers or those who have not even finished the book. The presence of an online community such as @litbase on Twitter is also helpful for young readers with limited experience and money in order to discuss books even before making an actual purchase.

High-demand sports: Welcome to the great outdoor

As awareness regarding physical and mental health grows amid the pandemic, sports become part of daily routine for 90% of Gen Z in our survey. Most popular form of exercise is jogging, soccer, and cycling – all of which are done outdoors, where the players can worry less about the risk of COVID-19 transmission.

Other sports such as golf and tennis have also gained popularity, although mostly in the upper socio-economic classes considering that one has to spend extra expense for the tools and the field.

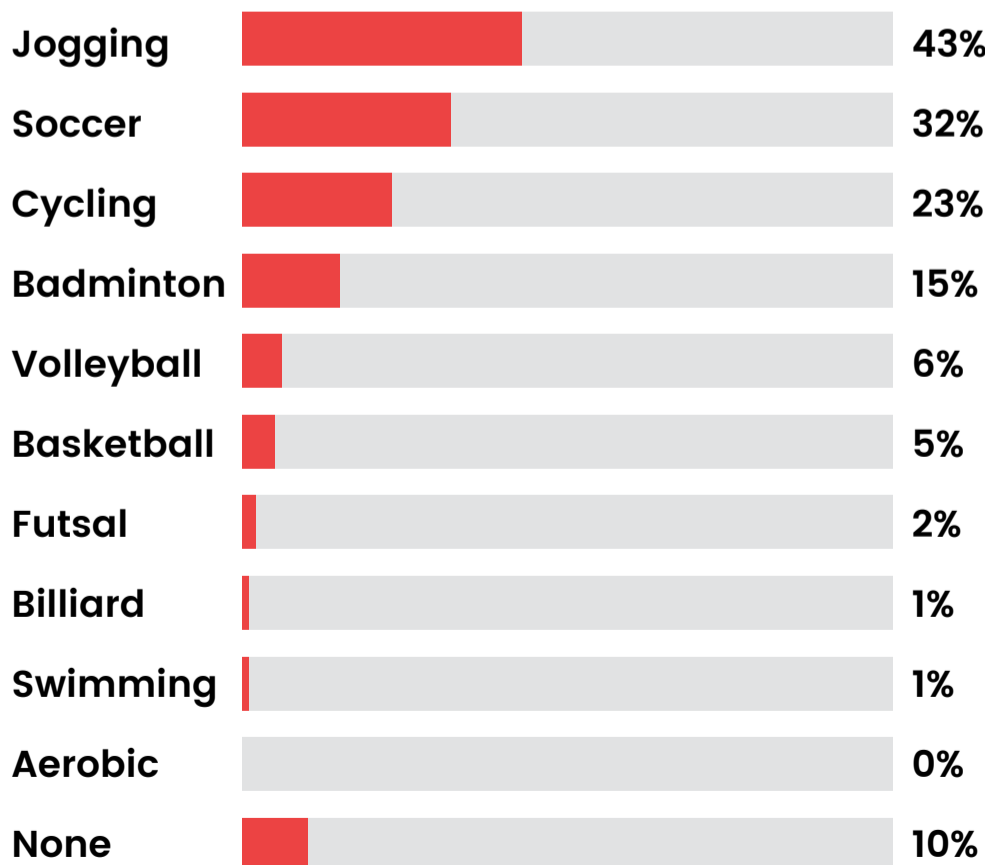


Image 5.5 Popular sports for Gen Z

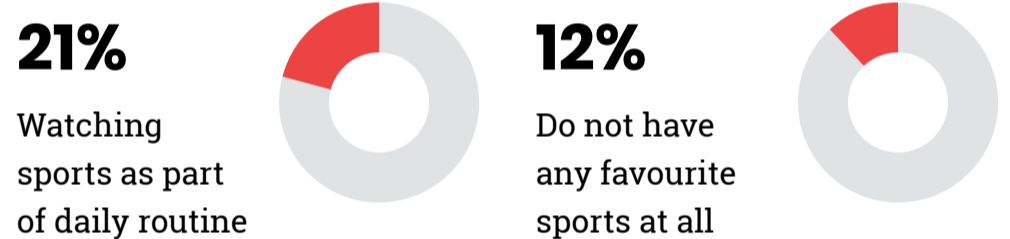


Image 5.6 Gen Z watching sports even they do not have any favourite sports

21% of Gen Z consider watching sports as part of their daily routine. However, only 12% of all Gen Z say that they have no favorite sports at all – meaning that watching sports is one of those activities that people just do even if it's not their particular interest.

Top 5 sport leagues in Indonesia are dominated by soccer

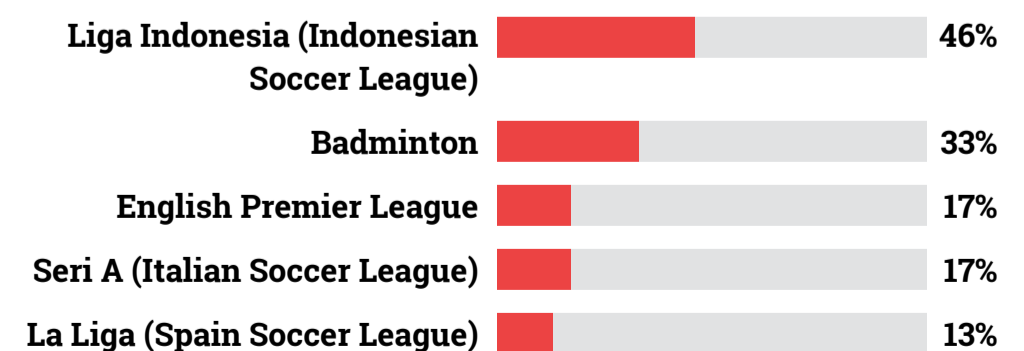


Image 5.7 Top 5 sport leagues in Indonesia

Lost in wanderlust: 55% Gen Z are ready to travel in 2022

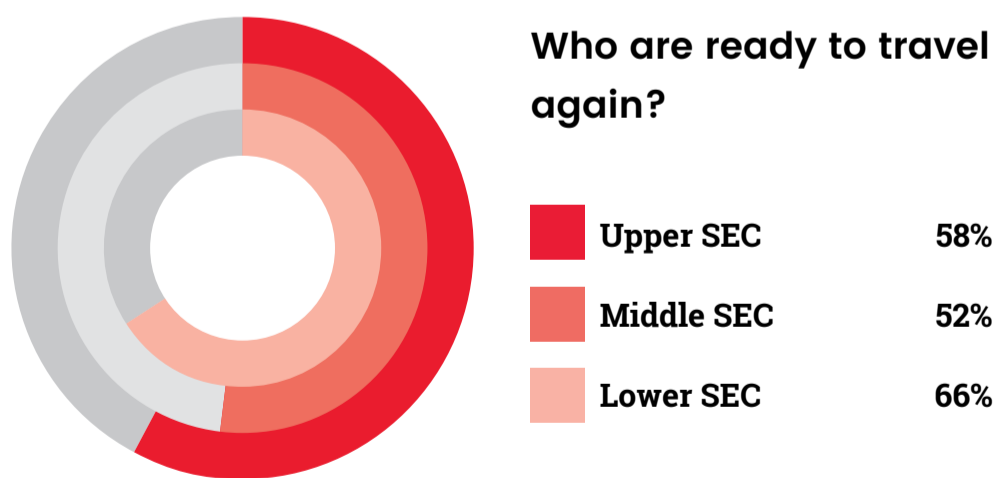


Image 5.8
Gen Z who are ready to travel by SEC

As Indonesia is loosening restrictions thanks to high vaccination rate and declining number of cases, more than half Gen Z are ready to travel again. While there is a slight difference among upper (58%), middle (52%), and lower (66%) socio-economic classes, we are seeing a rise of appetite for travel in 2022.

Concerns for Gen Z when they are traveling:

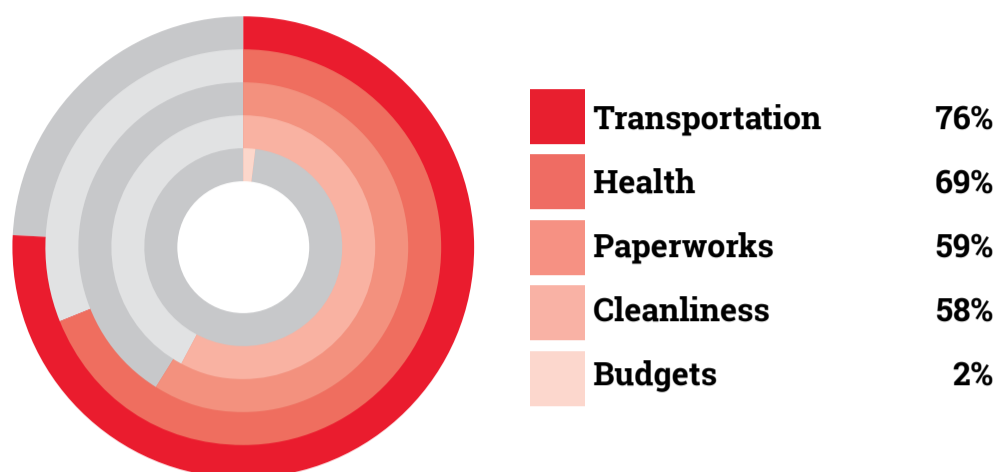


Image 5.9
Concerns for Gen Z when traveling

When traveling, transportation became key factors for 76% of Gen Z, even more than health (69%), cleanliness (58%), and paperworks (59%). Budgets seem to be the least concern for Gen Z, with only 2% – all belonging to the middle and lower SEC – saying they are considering budget as an important factor. As the Indonesian government is loosening COVID-19 restrictions by erasing paperwork requirements for travel, we might see even more Gen Z exploring new and old destinations in the country.

Top choice transportation for domestic travel:

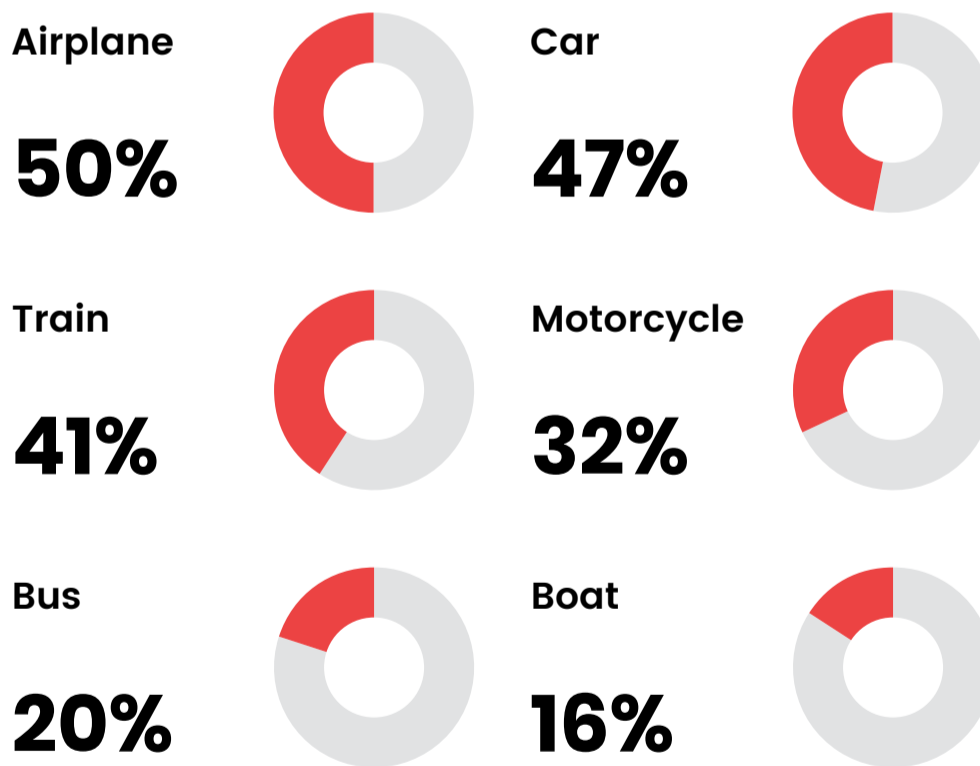


Image 5.10
Top choice transportation for domestic travel

Our finding shows that domestic travel, particularly inland, is gaining traction among Gen Z based on their choice of transportation. While airplane still becomes the top choice of transportation (50%), it's followed closely by car (47%), train (41%), motorcycle (32%), bus (20%), and boat (16%). Given that Indonesia is an archipelagic country, it makes sense that airplane still becomes the top choice as it is necessary for long distance travel.

Traveloka is #1 travel app for Gen Z, followed by Tiket.com

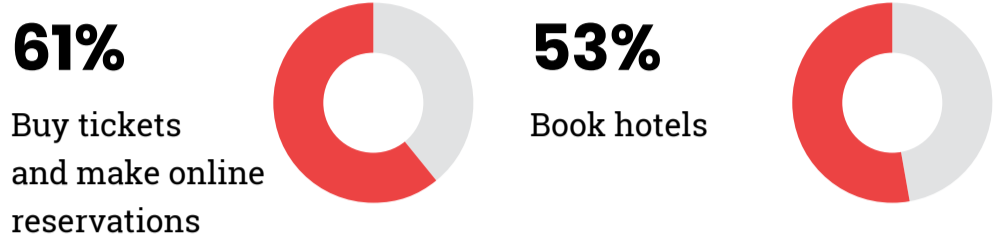


Image 5.11 Gen Z's Traveloka usage

As Gen Z is known for their mobile-first behavior, choosing a reliable travel-booking app is crucial. Our finding shows that Traveloka is the top choice for Gen Z when it comes to securing their tickets and making online reservations (61%), as well as booking hotels (53%).

Traveloka has become a favorite among Gen Z, beating local and global rivals, because it offers almost everything one needs for a trip, from the transportation to experiences that one can enjoy during vacation. Not only does it cover the activity part of the travel, Traveloka also offers financing choice with the buy now pay later (BNPL) scheme.

Popular platforms for traveling:

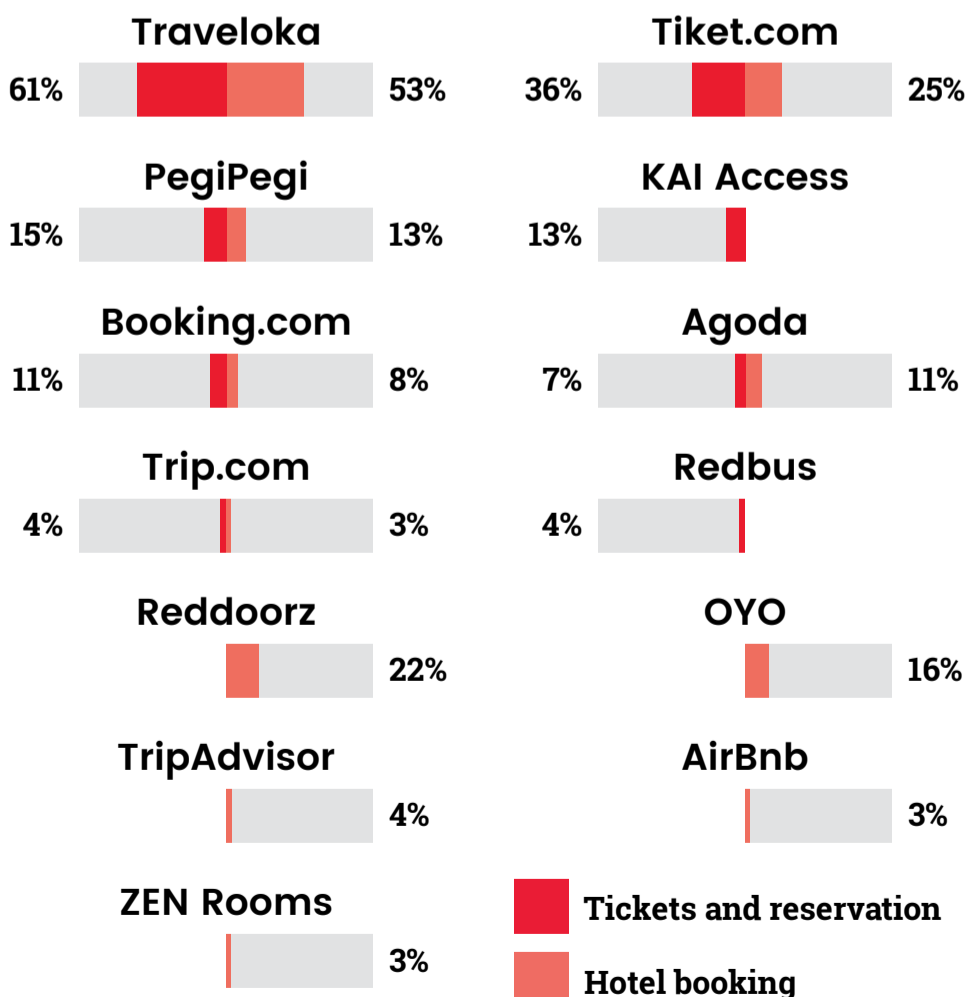


Image 5.12 Popular platforms for traveling



Nature and culinary are top travel priorities

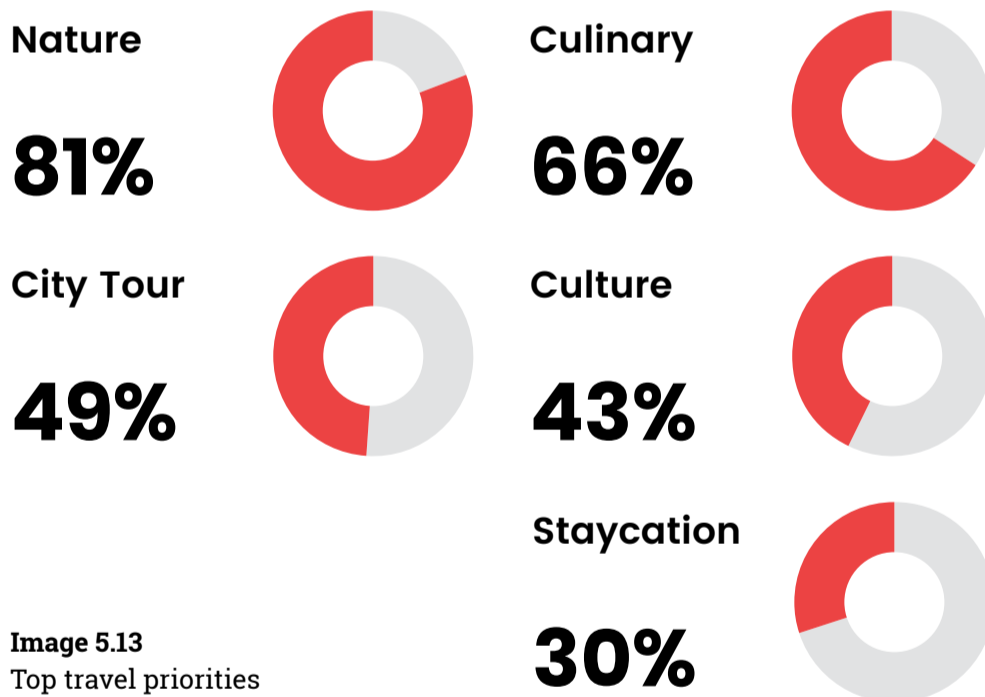


Image 5.13 Top travel priorities

Indonesia has a plethora of natural wonders for tourists and travelers, and it's no wonder that visiting natural attractions has become a top pick among Gen Z (81%). Given that Gen Z is more active on social media, the natural wonders provide them a good opportunity to create worthwhile content as well.

Culinary tour trails nature as the second most popular choice with 66%, followed by city tour (49%), culture (43%), and staycation (40%). While people might have to spend more time visiting natural attractions, culinary, city, cultural tour, and staycation are more practical and can be done as a one-day trip.

Several groups have offered guided walking tours in various cities, such as Jakarta Good Guide that offers dozens of routes for those who wish to explore the nook and cranny of the capital city.

YouTube is top choice to stream music, beating JOOX and Spotify

Most popular devices used to listen to music:

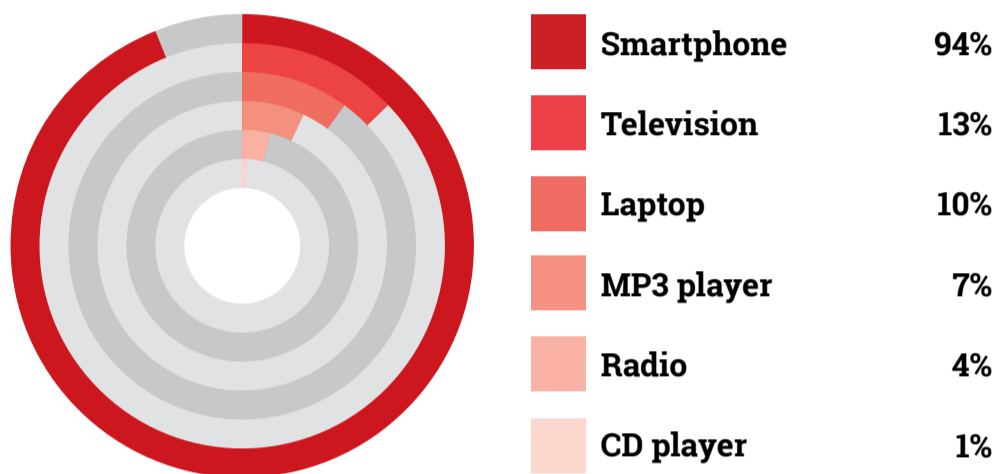


Image 5.14
Devices used to listen to music

94% of Gen Z use their smartphone to listen to music, leaving other devices like television (13%), laptop (10%), MP3 player (7%), radio (4%) and CD player (1%) far behind.

Popular platforms used to listen to music:

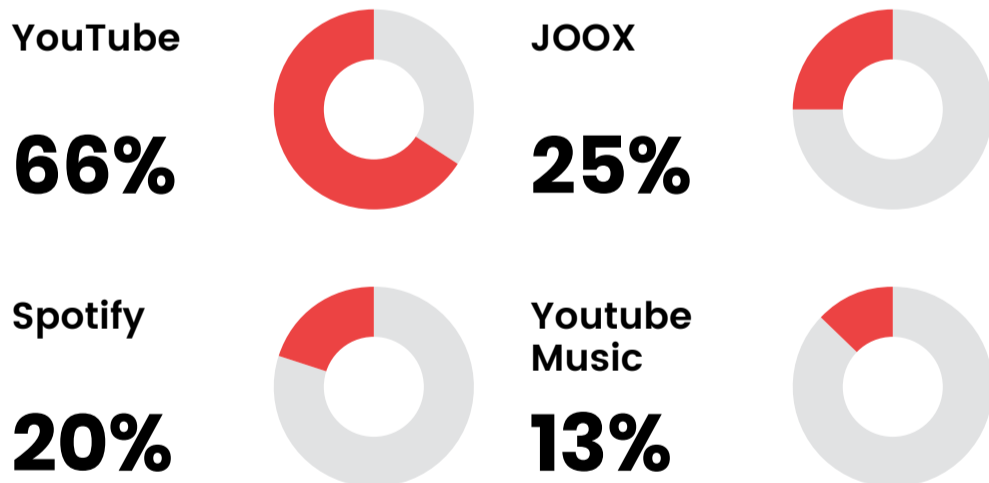


Image 5.15
Platforms used to listen to music

In the age of streaming, YouTube (65%) beats music-specific platforms such as JOOX (25%), Spotify (20%), and even YouTube Music (13%) itself. This is in line with our previous finding of YouTube as the second most used social media in Indonesia. However, the use of dedicated music streaming platforms such as JOOX and Spotify is more prevalent among Gen Z compared to their Millennial counterparts.

YouTube owes its popularity as a music-streaming service due to the fact that it comes as a preloaded application on most phones (as opposed to JOOX and Spotify, which users have to download first) and that it is free to access, both in terms of content and internet connection.

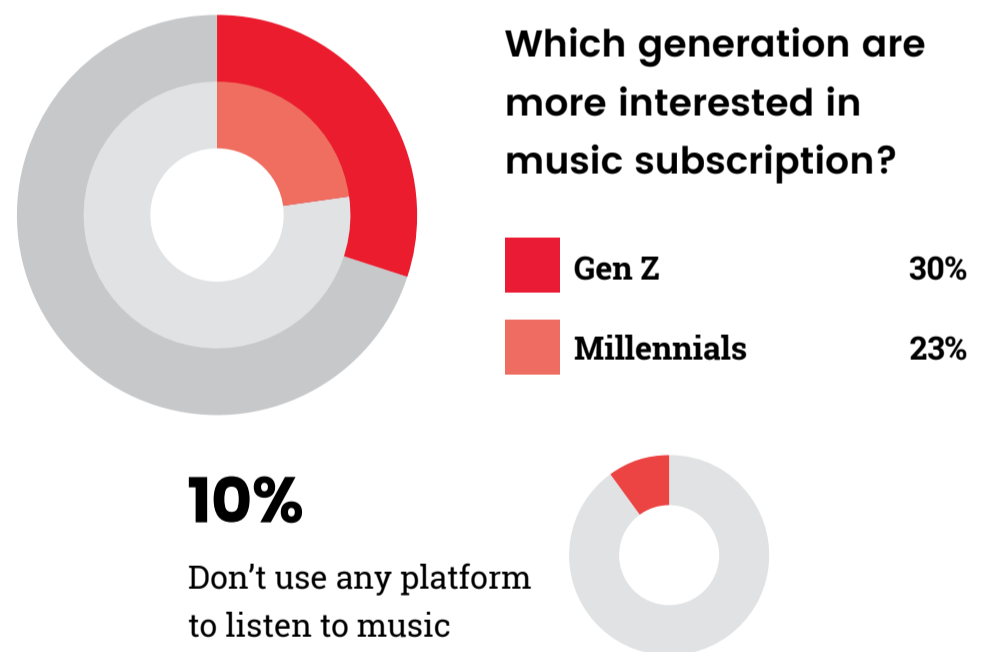
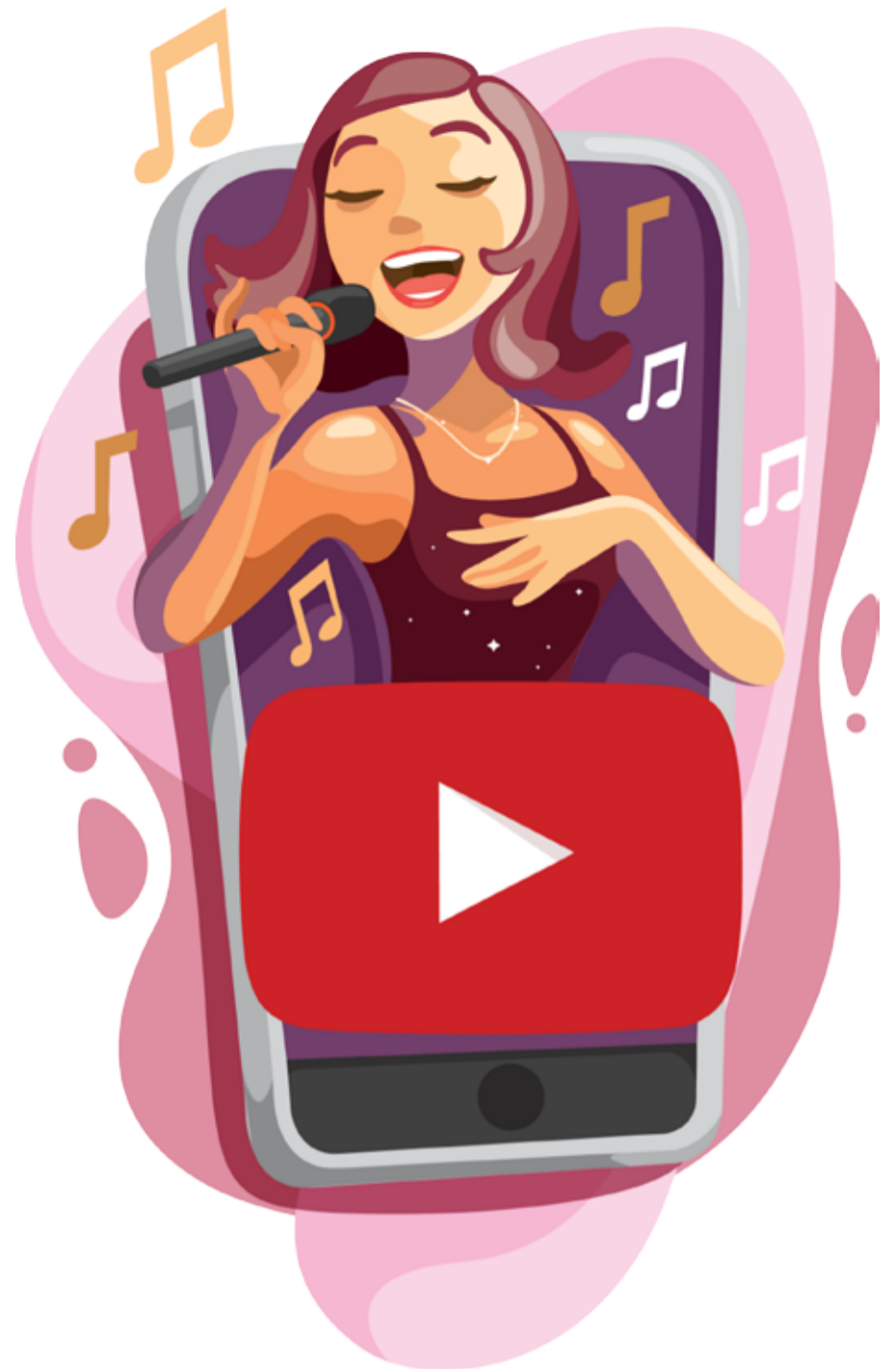


Image 5.16
Gen Z's interest in music subscription

Free being the imperative here considering that only 30% of Gen Z are interested in paying for subscriptions for music. 10% of Gen Z even say that they don't use any platform to listen to music, which leads to the assumption that they are enjoying pirated music. Still, the willingness to pay for a music subscription service is higher among Gen Z compared to Millennials, with only 23% saying that they are willing to spend extra dime for music.

The preference toward free content and platform explains why YouTube's use far exceeds YouTube Music, which is only accessible for premium users who pay for subscription.



Pop remains oh-so-popular among Gen Z

60%

Gen Z who choose Pop as their favourite music genre



When it comes to taste, our finding shows that the most popular music genre among Gen Z is, of course, pop (60%). Quite a significant population (16%) says that they have no preference and enjoy all genres. There’s also some (9%) who listen to Top 40 or whatever is on the radio. In our view, this might explain why some Gen Z forgo music subscriptions or online concerts as only few have favorite musicians or artists whose works they truly enjoy. To sum up, “Why bother?”

Less than 1 in 3 Gen Z (30%) say they are willing to pay for music subscriptions. Almost half Gen Z (45%) say that they are not interested in paying for music subscriptions. Our finding shows that willingness to pay for music subscriptions does not correlate with one’s socio-economic classification. Among the upper SEC, the interest to pay for music subscription is merely at 20%, with 35% among the middle SEC and 17% among the lower SEC. Perhaps for the middle class, paying for music has also become a status symbol – providing an extra motivation to subscribe.

21%

Gen Z who are interested in buying tickets for online concerts



We find the same pattern in willingness to buy tickets for online or virtual concerts, with only 21% are interested in buying tickets for online concerts. But when the Millennials have a musician or artist that they support, they will go all out.

In 2022, Justin Bieber announced the Justice World Tour which includes Jakarta, Indonesia, as one of the stops. The tickets were sold out within minutes after a fiasco with the e-commerce platform that provided the ticket, prompting an additional second date, which was also sold out. In hindsight, the promoter should’ve seen it coming as in our survey, Justin Bieber is the most popular international singer among the Gen Z – beating Adele, Bruno Mars, Taylor Swift, and Ed Sheeran.



Gen Z who are willing to pay for subscription:

Willing to pay	30%
Not interested	45%



Music subscription interest by SEC:

Upper SEC	20%
Middle SEC	35%
Lower SEC	17%

Image 5.17 Gen Z who are willing to pay for music subscriptions

The Hallyu question: 24% of Gen Z are interested in K-Pop

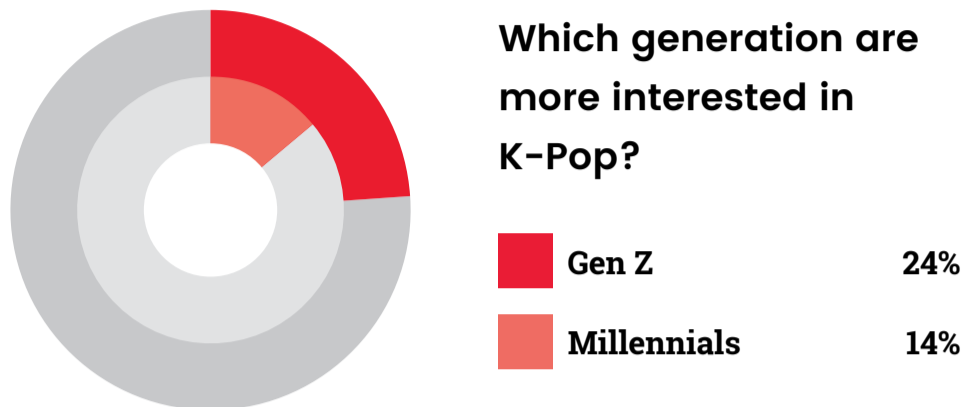


Image 5.18
Generation who are interested in K-Pop

K-Pop seems to take the world by storm, including in Indonesia. One in four (24%) of Indonesian Gen Z are actually interested in listening to K-Pop. This seems to be a relatively low number considering the fact that some local brands are using or have used K-Pop idols as their ambassador in the past year, such as Tokopedia with BTS. However, it's still higher than the rate of Millennials who say they are interested in listening to K-Pop at 14%.

The most popular Korean idols among the Gen Z who are interested in K-Pop are: BTS, BLACKPINK, and IU. Some Gen Z even specify names from their idol groups, such as Lisa from BLACKPINK and Jungkook and Taehyung (also known as V) from BTS.

1 in 3 Gen Z listen to podcast, mostly for fun



32%

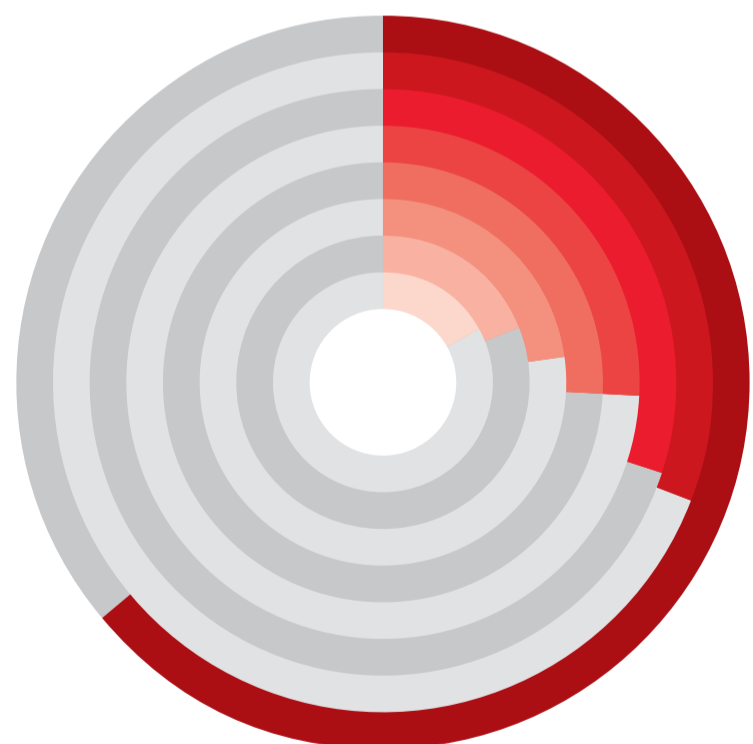
Gen Z who listen to podcasts



32% of Gen Z say they listen to podcasts. Of these podcast listeners, most tune in for entertainment topics such as comedy and drama. However, 1 in 3 podcast listeners say that they listen to podcasts to follow news and politics. There are also those who follow specific topics such as culture (30%), health (26%), business (26%), sports (23%), investigative journalism (19%) and even religion (17%).

In Indonesia, some podcasts are not only available in audio format but also in video. This allows the podcast to be published on YouTube too, which helps them reach an even bigger audience compared to audio-streaming platforms such as Spotify, Apple Podcast, and Google Podcast.

Popular topics Gen Z listen on podcast:



Comedy	64%	Business	26%
News and politics	31%	Sports	23%
Society and culture	30%	Journalism	19%
Health and fitness	26%	Religion	17%

Image 5.19
Popular topics Gen Z listen on podcast

Movies: Comedies, action, and drama still reign on the big screen

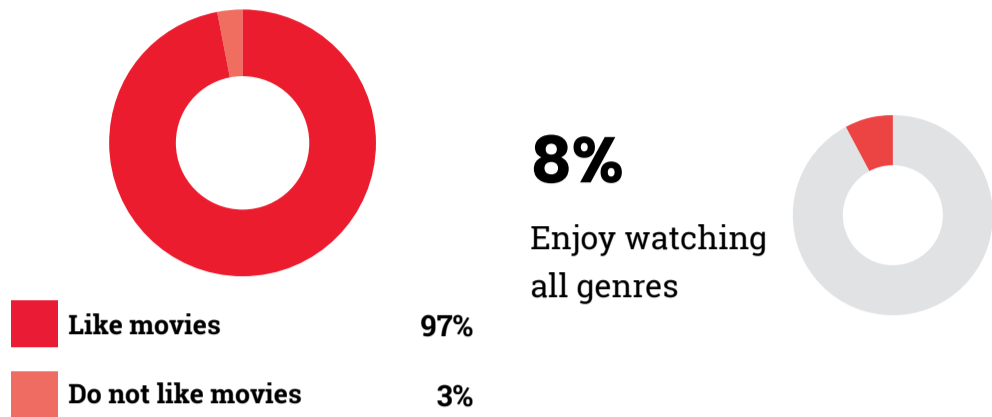


Image 5.20
Gen Z who like watching movies

97% of Gen Z like to watch movies, with comedy, action, and horror as the most popular genre among the Gen Z. 8% say that they have no preference at all and enjoy watching all genres. Only 3% of Gen Z say that they don't really like watching movies.

Popular movie genres among Gen Z:

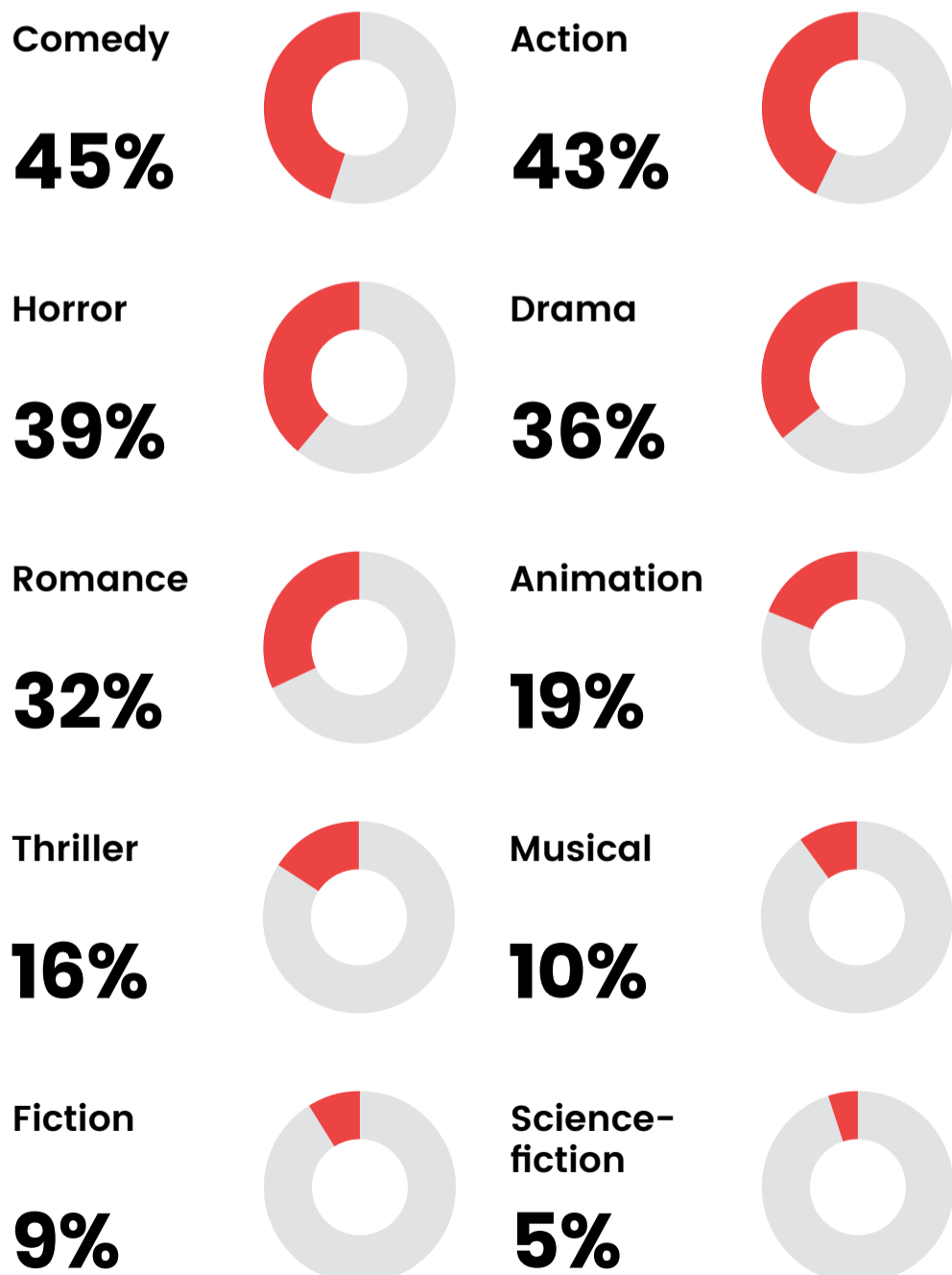


Image 5.21
Popular movie genres among Gen Z



How Gen Z watch movies:

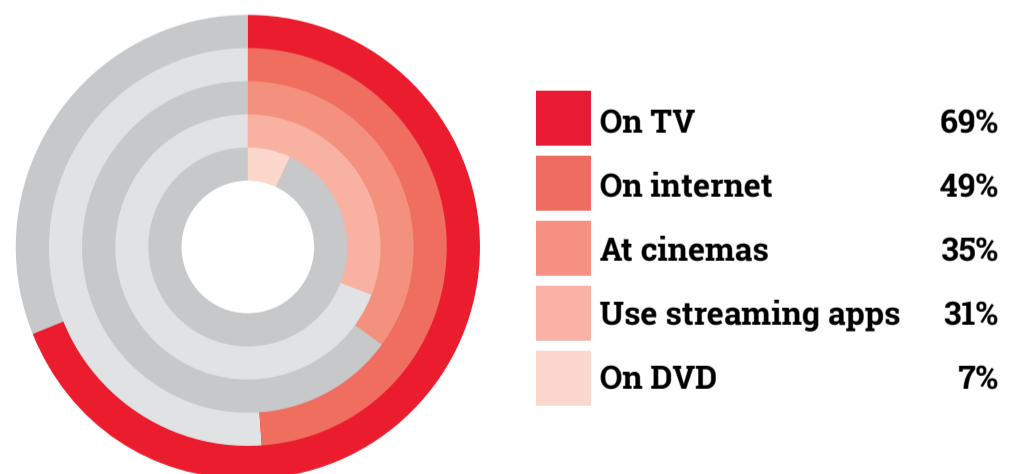


Image 5.22
How Gen Z watch movies

69% of Gen Z say that they watch movies on TV. Almost half of Gen Z (49%) watch movies on the internet, but only 31% use streaming apps. 35% of Gen Z watch movies at the cinemas, which might seem to be a low number but understandable considering that Indonesian cinemas only began to start operating again in mid-2021 with limited capacities. 7% of Gen Z still watch movies on DVD.

Hello, Netflix.

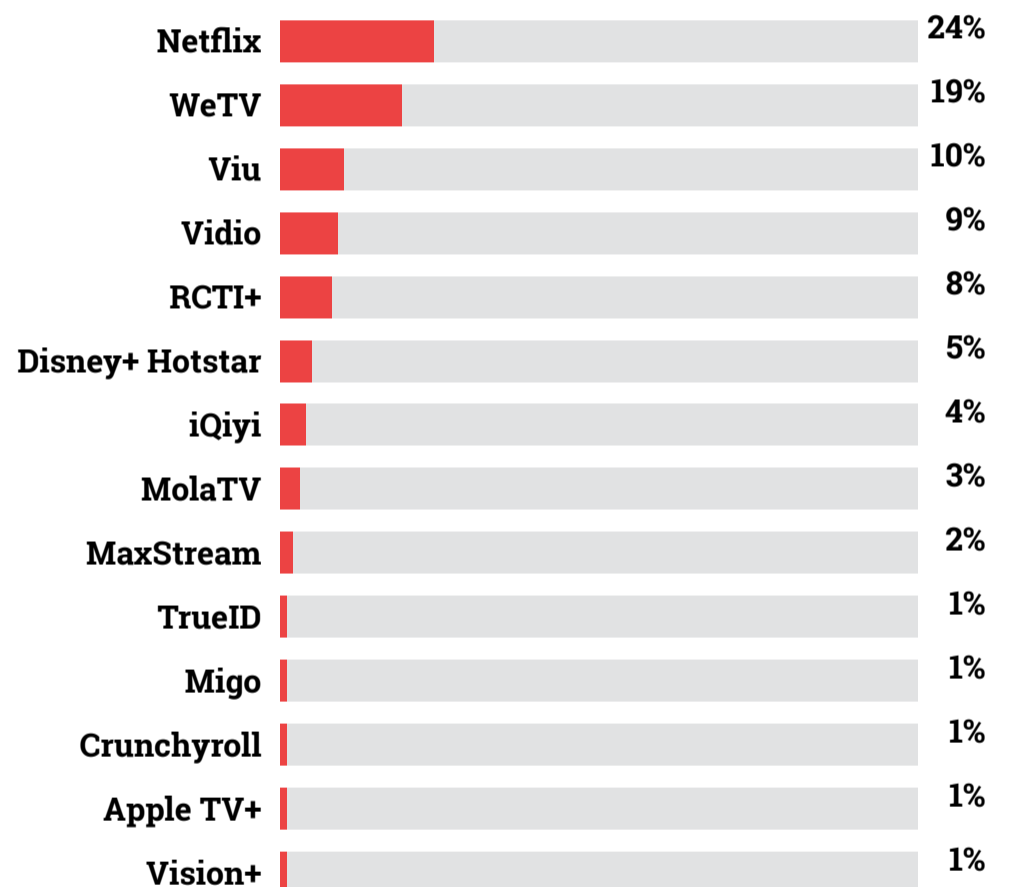
Are you still watching Indonesian Gen Z?



Only 31% of Gen Z say that they are interested in paying subscriptions for movie streaming platforms. 45% say they are not using any streaming platform right now. The decision not to have a subscription is not entirely about money, as the rates of those who are not using streaming platforms are similar across SEC: 56% for the upper SEC, 43% for middle SEC, and 47% for lower SEC.

While some Gen Z do use streaming platforms, willingness to pay is an entirely different matter. The most popular platforms after Netflix are those that can be accessed without paid subscriptions such as WeTV, Viu, Vidio, and RCTI+.

Top streaming platforms for Indonesian Gen Z:



31%
Interested in paying subscription



45%
Not using any streaming platform



The rate of Gen Z who are not using streaming platforms:

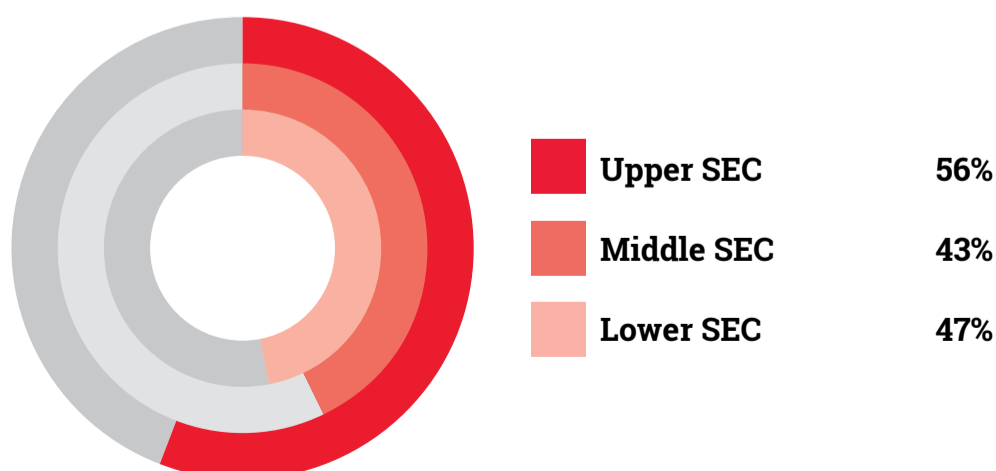


Image 5.23 Millennials' interest on movie streaming platforms

Image 5.24 Top streaming platforms for Indonesian Gen Z

K-Drama and K-Movie are swooning female Gen Z



Image 5.25 Gen Z's interest on K-Drama and K-Movie

29% of Gen Z say that they are interested in watching K-Dramas and K-Movies. Unsurprisingly, more female Gen Z (45%) watch K-Drama and K-Movies compared to their male counterparts (15%). Perhaps, it's because the most popular K-Dramas are about romance.

2 in 3 Gen Z support local movie industry

67% of Gen Z say that they are interested in watching local movies, with only 14% outrightly saying that they are disinterested in doing so. Perhaps, this growing interest in local movies is due to the success of several hit local movies in the past few years such as *The Raid*, *Pengabdian Setan*, *Marlina si Pembunuh dalam Empat Babak*, *The Science of Fictions*, *Nanti Kita Cerita tentang Hari Ini*, and more recently, *Seperti Dendam*, *Rindu Harus Dibayar Tuntas*, *Yuni (2021)* and *Srimulat: Hil yang Mustahal*, *Kukira Kau Rumah*, *Ngeri Ngeri Sedap* and *KKN di Desa Penari (2022)*.

67%

Interested in watching local movies



14%

Disinterested in watching local movies

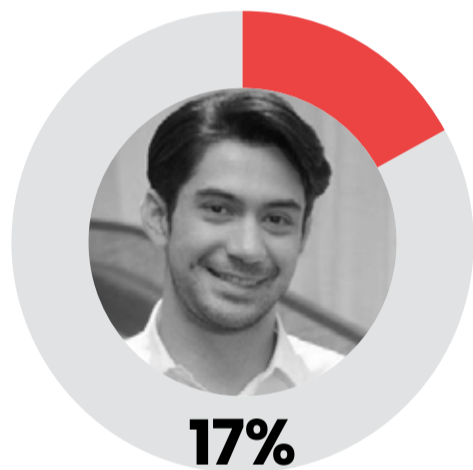


Image 5.26 Millennials' interest on local movie

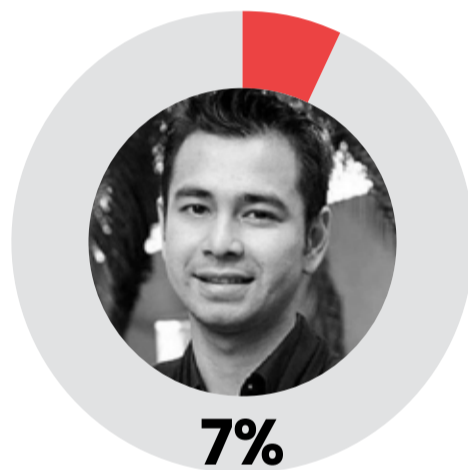
There's this joke that Reza Rahardian can play everyone in a movie given how many movies he has starred in. With his stellar acting, it's not surprising that Reza Rahardian is the most popular actor in Indonesia according to the Gen Z. Following Reza is Amanda Manopo, who despite her young age, has starred in at least a dozen TV series and movies. Uprising actors and actresses are also in hot demand for Gen-Z such as Bio One, Abidzar Al Ghifari, Zulfa Maharani, Febby Rastanty, Elang El Gibran, Zara Adhistry, Angga Yunanda, and more.

Most popular Indonesian actors and actresses

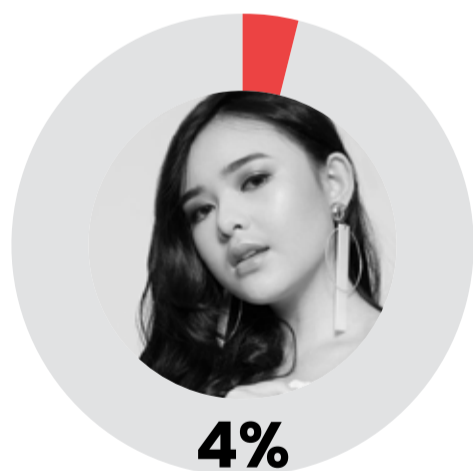
Reza Rahardian



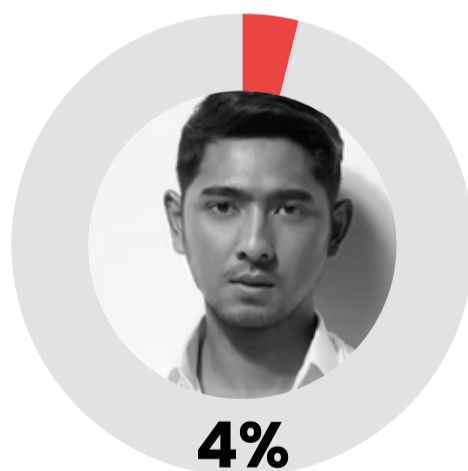
Raffii Ahmad



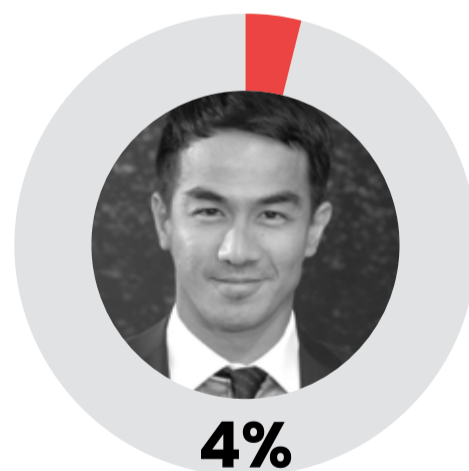
Amanda Manopo



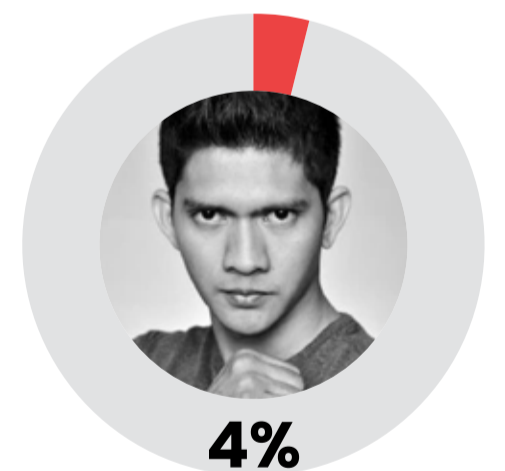
Arya Saloka



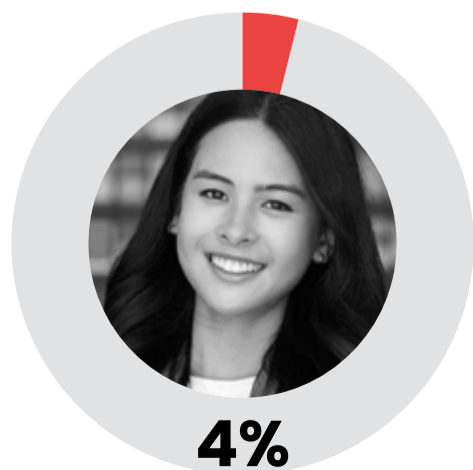
Joe Taslim



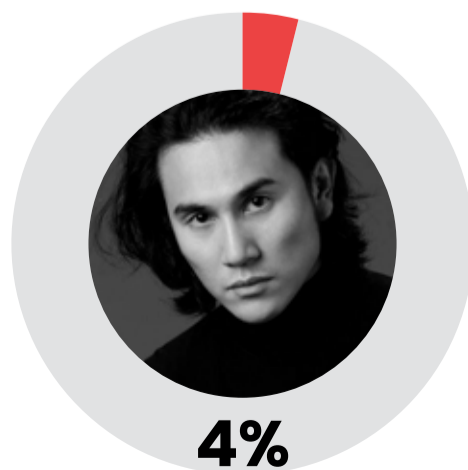
Iko Uwais



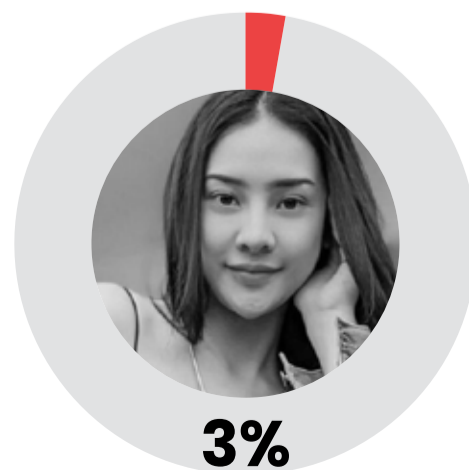
Maudy Ayunda



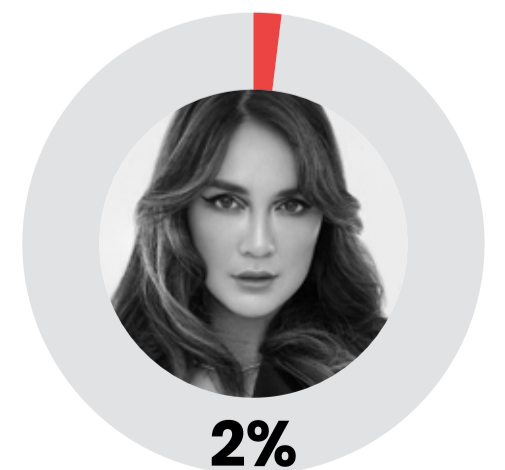
Vino G Bastian



Anya Geraldine



Luna Maya



Mobile games: 43% of Indonesian Gen Z are ready to play

More than 2 in 5 Gen Z say they are interested in playing mobile games, with more late teens (49%) compared to young adults (37%). There's a clear gender gap as men (62%) favor mobile games much more than women (19%). This male-domination explains the choices of games that are popular among Indonesian Gen Z, which are multiplayer online battle arena (MOBA, 44%), Battle Royale (29%), adventure (21%), action (19%), and sports (15%).



Gen Z who interested to play by age:

- Late teens 49%
- Young adults 37%



Gen Z who interested to play by gender:

- Male gamer 62%
- Female gamer 19%



Popular games among Indonesian Gen Z:

- MOBA 44%
- Battle royale 29%
- Adventure 21%
- Action 19%
- Sports 15%

Image 5.27 Gen Z's interest on mobile games

22%

Gen Z say that they are willing to purchase games tokens or vouchers



However, 22% of Gen Z say that they are willing to purchase games tokens or vouchers. If we assume that the same Gen Z who are willing to pay for in-app purchases are the ones who are also interested in playing, it means that one in two mobile games players are ready to spend their money. This certainly presents a huge market for mobile game developers.



FINANCE — AND — SPENDING BEHAVIOR





Almost 2 in 3 Gen Z spends below Rp 4,000,000 per month



The eldest of Gen Z have lived through three economic crises: the 1998 Asian financial crisis, the 2008 global financial crisis, and the 2020 pandemic-induced financial crisis. The last is particularly significant as it hit when some Gen Z were graduating and looking for a job or starting their first or second year on the job.

65% of Gen Z lives below Rp 4.000.000 per month. 16% of Gen Z whose monthly expenditure is below Rp 1.250.000 are more likely to be students or unemployed. Almost half of all Gen Z (49%) are living with Rp 1.250.001 to Rp 4.000.000 per month, which is similar to the range of starting salary or minimum regional wage in various places in Indonesia.

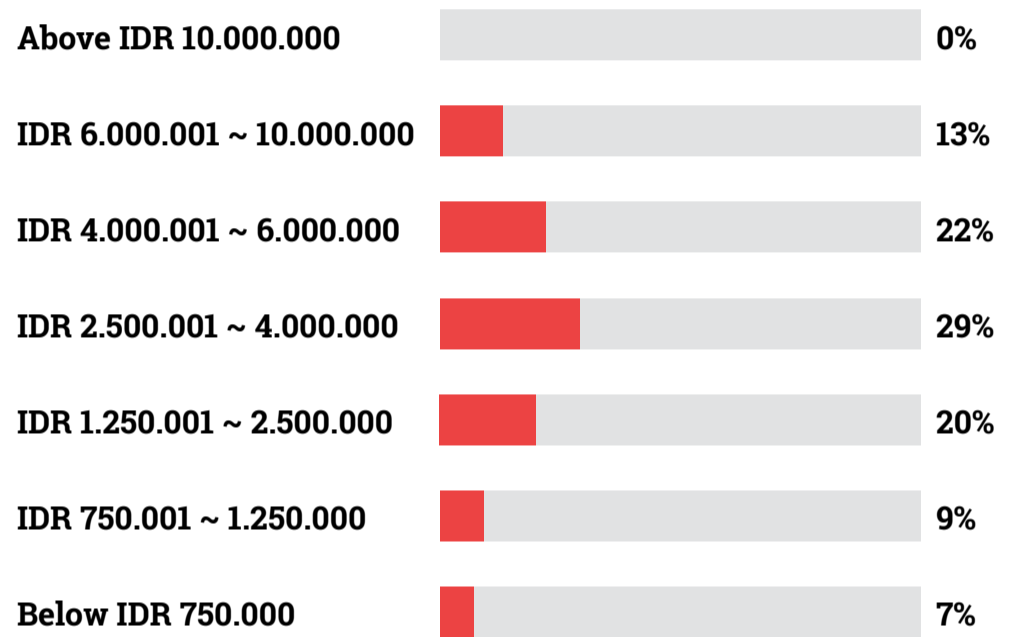


Image 6.1
Gen Z's monthly expenditure

All Respondents	Total	Medan	Palembang	Greater Jakarta	Greater Bandung	Greater Semarang	Greater Yogyakarta	Surakarta	Greater Surabaya	Greater Denpasar	Banjar-masin	Balik-papan	Makassar
> Rp 10.000.000	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%
Rp 6.000.001 ~ Rp 10.000.000	13%	20%	2%	12%	3%	2%	24%	2%	38%	21%	2%	6%	6%
Rp 4.000.001 ~ Rp 6.000.000	22%	12%	12%	25%	34%	35%	6%	0%	27%	13%	4%	36%	48%
Rp 2.500.001 ~ Rp 4.000.000	29%	10%	44%	33%	61%	18%	17%	8%	2%	23%	72%	38%	24%
Rp 1.250.001 ~ Rp 2.500.000	19%	37%	17%	17%	1%	25%	22%	49%	13%	26%	19%	9%	19%
Rp 750.001 ~ Rp 1.250.000	9%	20%	4%	9%	0%	8%	15%	20%	6%	13%	2%	8%	2%
< Rp 750.000	7%	0%	20%	5%	0%	11%	15%	18%	14%	3%	0%	2%	0%
Minimum Regional Wage	Rp 3.370.645	Rp 3.289.409	Rp 4.217.206 - Rp 4.816.921	Rp 3.248.283 - Rp 3.774.860	Rp 1.894.032 - Rp 2.835.021	Rp 1.900.000 - Rp 2.153.970	Rp 2.035.720	Rp 1.956.773 - Rp 4.375.479	Rp 2.802.926	Rp 3.000.710	Rp 3.118.397	Rp 3.294.467	



Aside from the survey, we also asked several Gen Z to tell us about their spending habits in order to give a better portrayal about their monthly expenditure.

Only 1 in 8 Gen Z who share the details of their expenditure with us lives alone in a boarding room (*kos-kosan*), while the rest live at their parents' home. This reflects on their spending, as household routine spending (for rent or housekeeping) will be shared or even completely covered by their parents.

Food and snacks make up the large chunk of Gen Z's monthly spending. Frivolous spending, which includes snacks and entertainment, takes up 18.69% to 70.59% of Gen Z's spending. This seems to explain the stereotype of Gen Z's penchant for "self-healing" through material or hedonist activities.

Instead of judging Gen Z for their frivolous spendings, we should encourage them to start building healthy financial habits i.e. to start saving and investing. Half of Gen Z who talk to us say that they have routinely saved and invested their money every month, two say they only do so when they have extra income, and one says that she only does it when she remembers.

Of course, the small sample size means that this can't be taken as a general picture of all Gen Z. However, a 2019 finding from the National Survey on Financial Literacy and Inclusion (SNLIK) reveals that the national financial literacy index in Indonesia is merely at 38%. It never hurt to encourage and teach Gen Z about healthy financial habit while they are still at a young age.

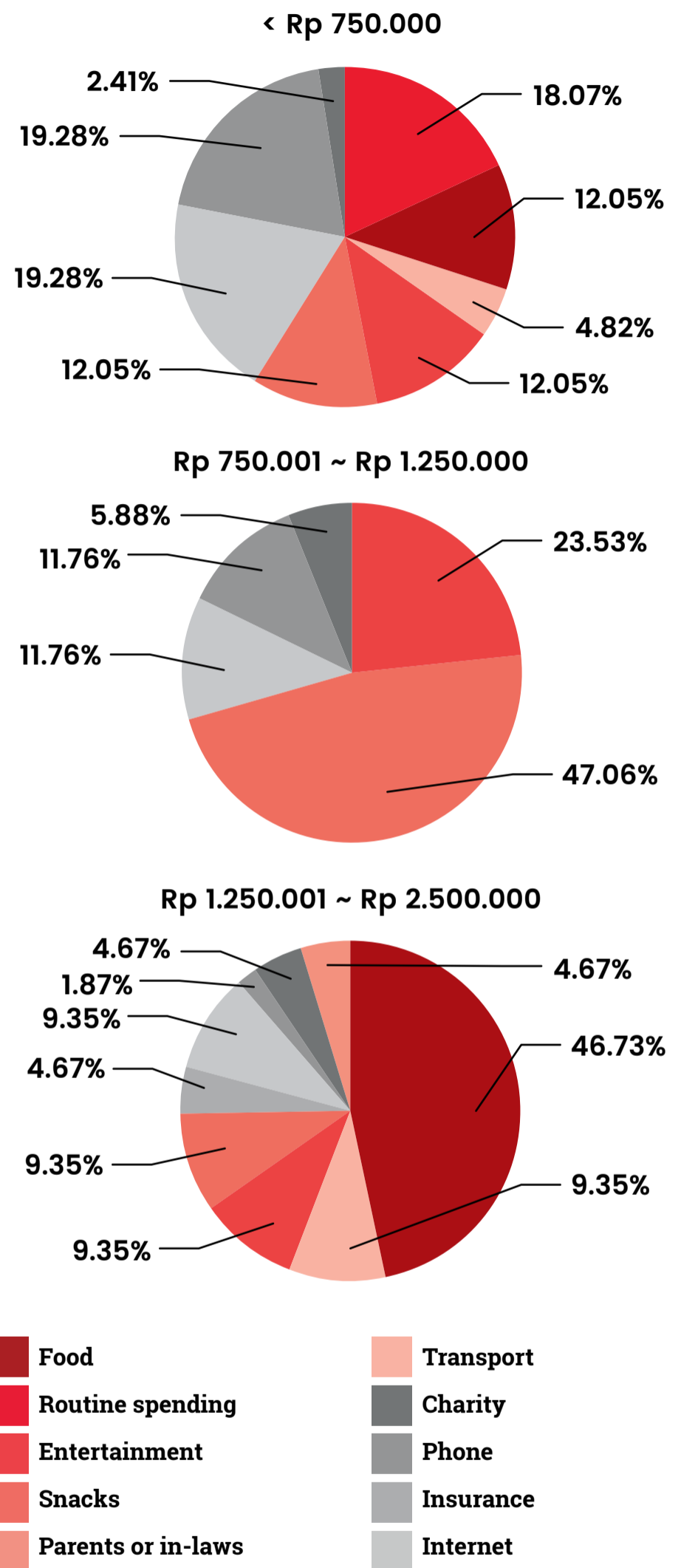


Image 6.2
Gen Z's spending per month by income

Conventional bank saving account remains favorite among Gen Z

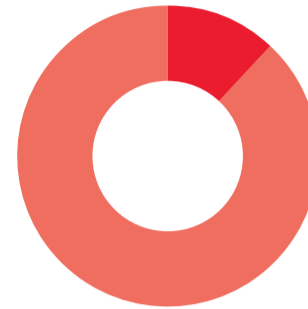


Image 6.5
Credit card ownership

Credit card used by Gen Z:

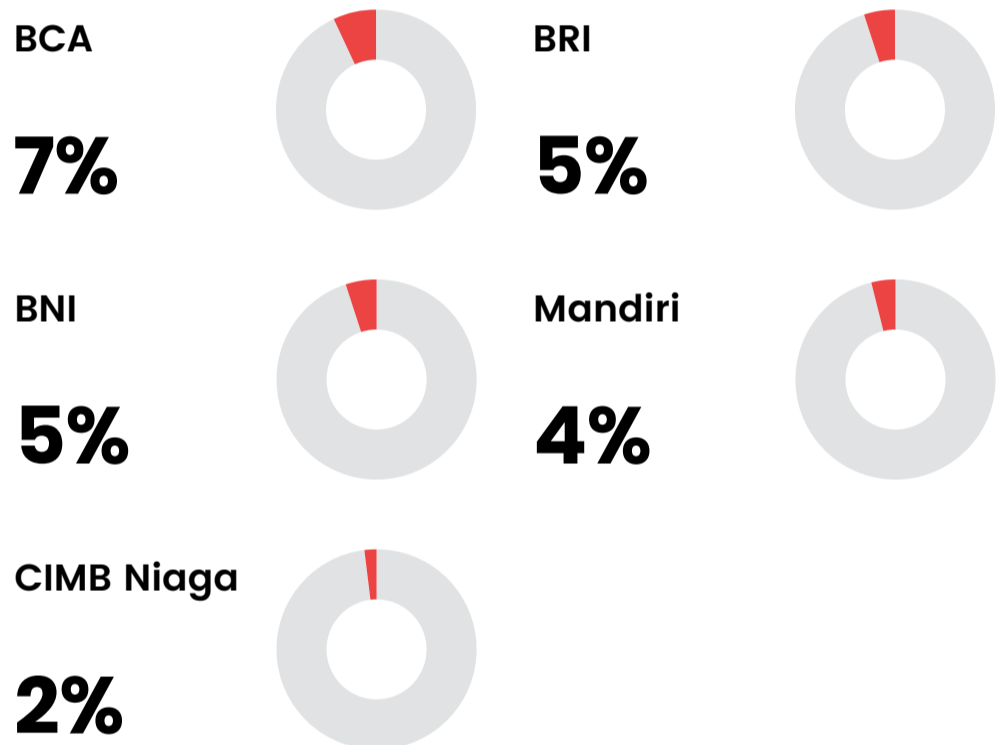


Image 6.6
Credit card used by Gen Z

88% of Gen Z do not have a credit card. Among the 12% who do, BCA remains the most favorite (7%), ahead of BRI (5%), BNI (5%), Mandiri (4%), and CIMB (2%). This is consistent with the bank account that Gen Z has.

Financial inclusion is a challenge in Indonesia, as a large part of the population is still deemed unbanked – having no access to financial products or services due to their socio-economic background or geographical obstacle. A 2019 finding by the Financial Services Authority (OJK) reveals Indonesia's financial inclusion rate is at 76.1%.

However, the pandemic might have helped accelerate the rate of financial inclusion in the country, as people are encouraged to use digital wallet or mobile banking for cashless transactions, according to the East Ventures - Digital Competitiveness Index (EV-DCI) 2022 by East Ventures in collaboration with Katadata and PwC Indonesia.

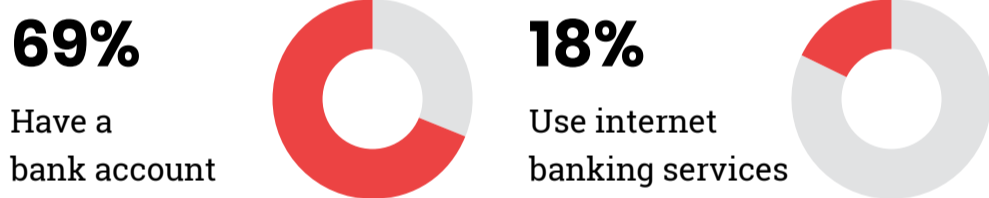


Image 6.3
Gen Z's banking behavior

69% of Gen Z have a bank account and 18% have used internet banking services. The rate of Gen Z who have a bank account in this survey might be higher than the actual condition due to the fact that most of these Gen Z reside in urban areas such as Greater Jakarta, Surabaya, or Makassar (the biggest city in Eastern Indonesia).

Digital bank account used by Gen Z:

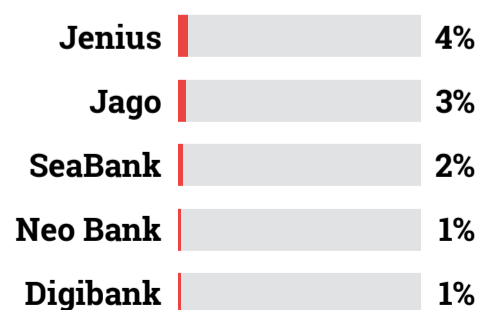


Image 6.4
Digital bank account used by Gen Z

Only 10% of Gen Z have a digital bank account. Jenius, one of the first digital banks to be launched in Indonesia, is the most used digital bank. However, the competition is tight since GoTo-owned Jago and newly launched Neo Bank are also gaining users among the Gen Z.

70%

Own cashless financial product



Have e-wallet 51%

Have e-money 5%

Image 6.7
Gen Z who own cashless financial product

70% of Gen Z say that they own a cashless financial product. More than half (51%) of Gen Z use e-wallet and 5% of Gen Z have e-money.

In Indonesia, e-money is used mainly for daily transportation. Commuter line, MRT, or bus services, particularly in Jakarta, utilizes e-money cards in lieu of conventional tickets. Toll roads in Indonesia have also shifted to non-cash payment with e-money, which explains its proliferation. People can top up their e-money and e-wallet through an ATM or with the help of minimarts, whose presence is ubiquitous in the country.

To standardize e-wallet transactions, the Bank of Indonesia launched the QRIS (Quick Response Code Indonesian Standard). The use of QRIS simplifies e-wallet transactions, as now people can pay using any e-wallet service they have as opposed to the exact same platform that the merchant uses.



Interested in cashless transaction 68%

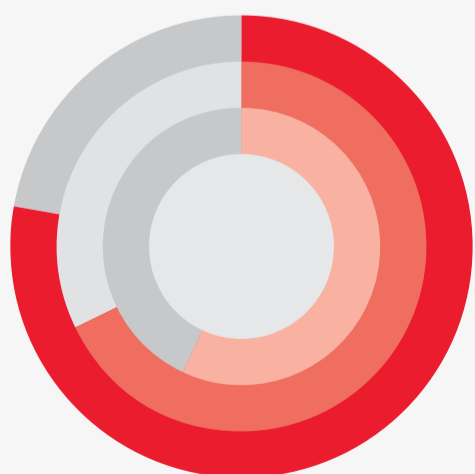
Interested in cash transaction 86%

Image 6.8
Gen Z's interest in cash and cashless transactions

While 68% of Gen Z are interested in cashless transactions, more (86%) say they are still interested in cash transactions. The preference toward cashless transactions increases along with one's socioeconomic class: the more affluent a Gen Z is, the more likely they are to choose cashless transactions. Perhaps, it's because those from lower SEC has less infrastructure that can support cashless transactions (cheap phones with limited feature, issue with internet connection), the fee for using e-wallet (although it seems small, the charges add up), or due to lack of confidence in cashless transactions (fear of being scammed and losing one's money).

E-wallet surpasses other cashless payment methods among Gen Z

Are you interested in cashless transactions?



Upper SEC 78%

Middle SEC 68%

Lower SEC 57%

Image 6.9
Gen Z who are interested in cashless transaction by SEC



More than half of Gen Z are homeowners



55% of Gen Z in our survey say that they own their own houses. 38% of all Gen Z say that they bought their house cash, while 17% Gen Z have a mortgage (KPR) and 10% choose a Islamic mortgage (KPR syariah). Besides its religious factor, KPR syariah is considered to be more affordable as conventional mortgages often have higher interest rates.

We talked to several Gen Z who do not own a house. The Gen Z live with their parents or at a boarding room (*kos-kosan*). Almost all of them plan to buy their own house. Some admit they are still thinking about it because their parents still have a house that can be inherited and the current housing market makes it tricky to find a strategically located and affordable house

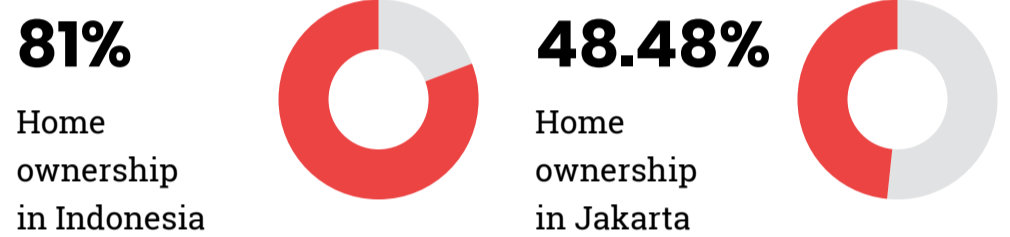


Image 6.11 Household who own their home

According to Statistics Indonesia, 81% of households in Indonesia own their home. However, the rate varies per province. Jakarta, for instance, has the lowest homeownership rate in the country at 48.48%. Gen Z in the capital city might have the hardest time realizing their dream of becoming a homeowner.

However, our data shows that other regions might also be home to Gen Z who have yet to own their own place. It seems that housing is a national problem, particularly in urban areas – exactly where the young people are.

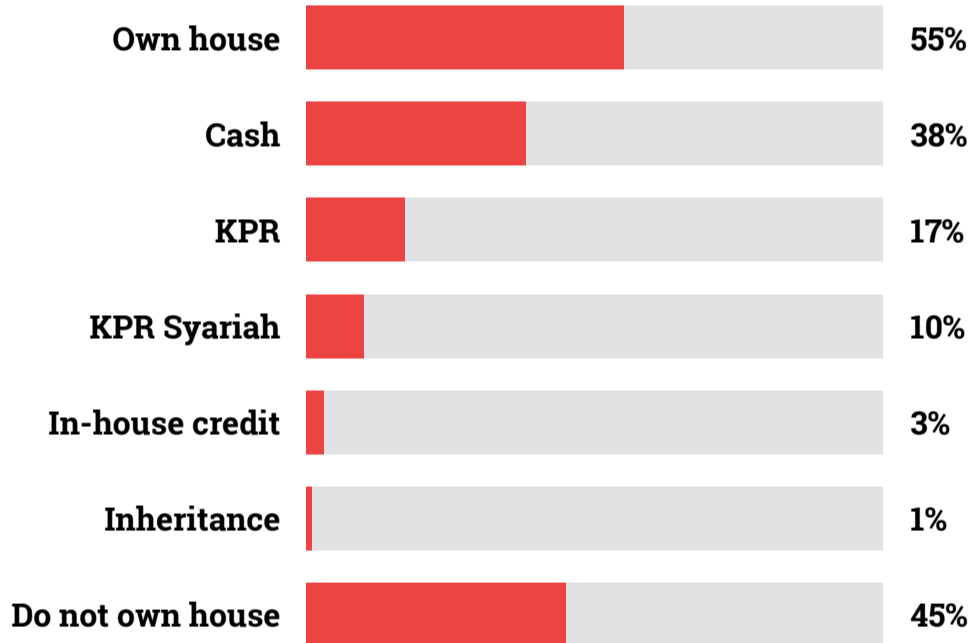


Image 6.10 Gen Z's house ownership

Gen Z who do not own a home in big cities

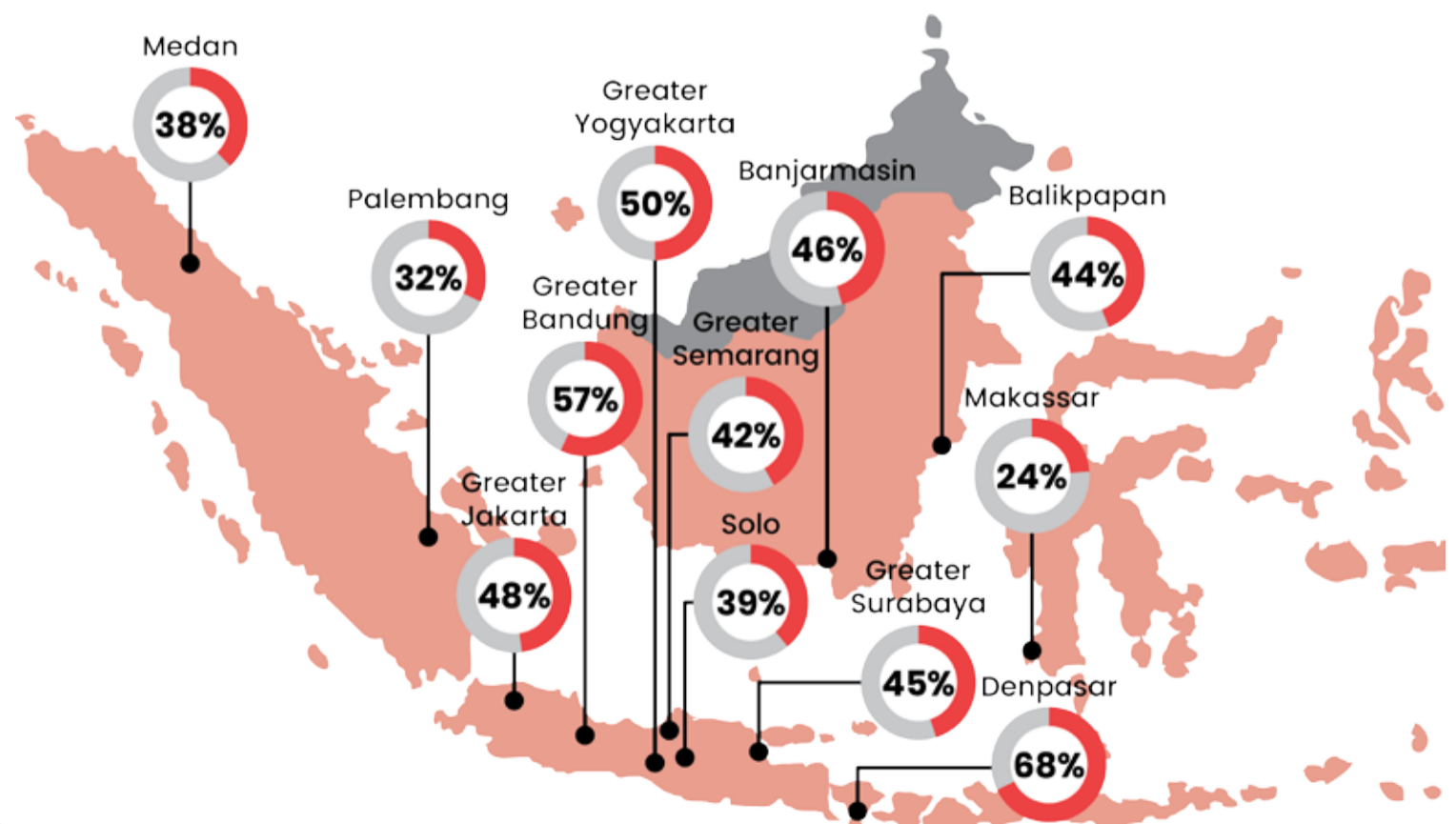
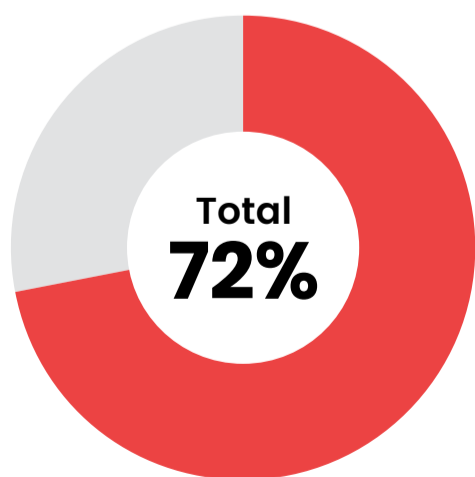


Image 6.12 Gen Z who do not own a home in big cities

Gen Z still prefer conventional investment, if any

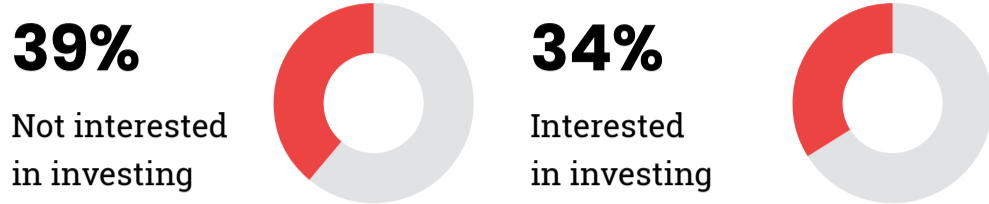


Image 6.13
Gen Z's preference toward investment

There are more Gen Z who say that they are not interested in investing (39%), compared to the 34% who say investing is worth considering, or even worth doing. This is concerning as lack of investment, particularly for pension, means that the Gen Z will have to work even after their official retirement age or rely on their offsprings for livelihood. However, this can also just be because the Gen Z are still very young, with limited or little income, so that they are very distant with the concept of investing and pension.

We find similar preference toward investment in the upper and middle socio-economic class, in which the Gen Z have lukewarm interests toward investment. It is within the lower SEC that we find the highest interest to invest. Perhaps, it's because they are motivated by their socio-economic background and hence aspire to be middle class.

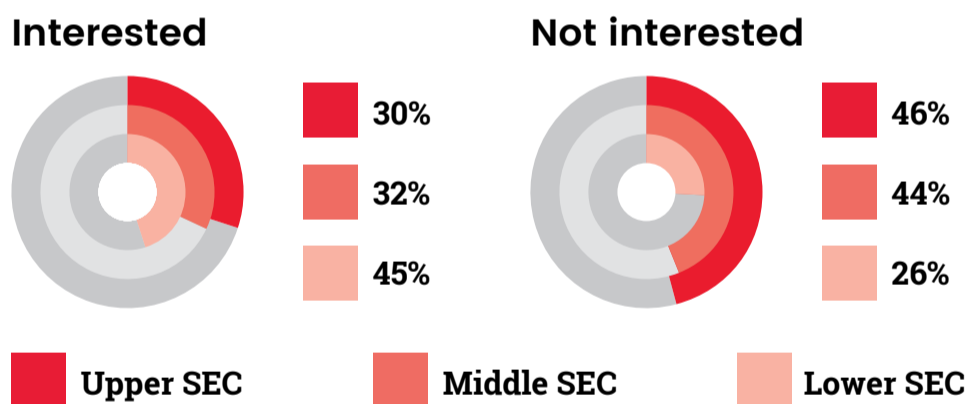


Image 6.14
Gen Z's preference toward investment by SEC

Conventional investment products such as gold, property, and stock are still favorable among the Gen Z who have started investing. Ownership in new types of investment such as P2P (peer to peer) lending and cryptocurrency is still not significant among Indonesian Gen Z.

Popular investment among Indonesian Gen Z

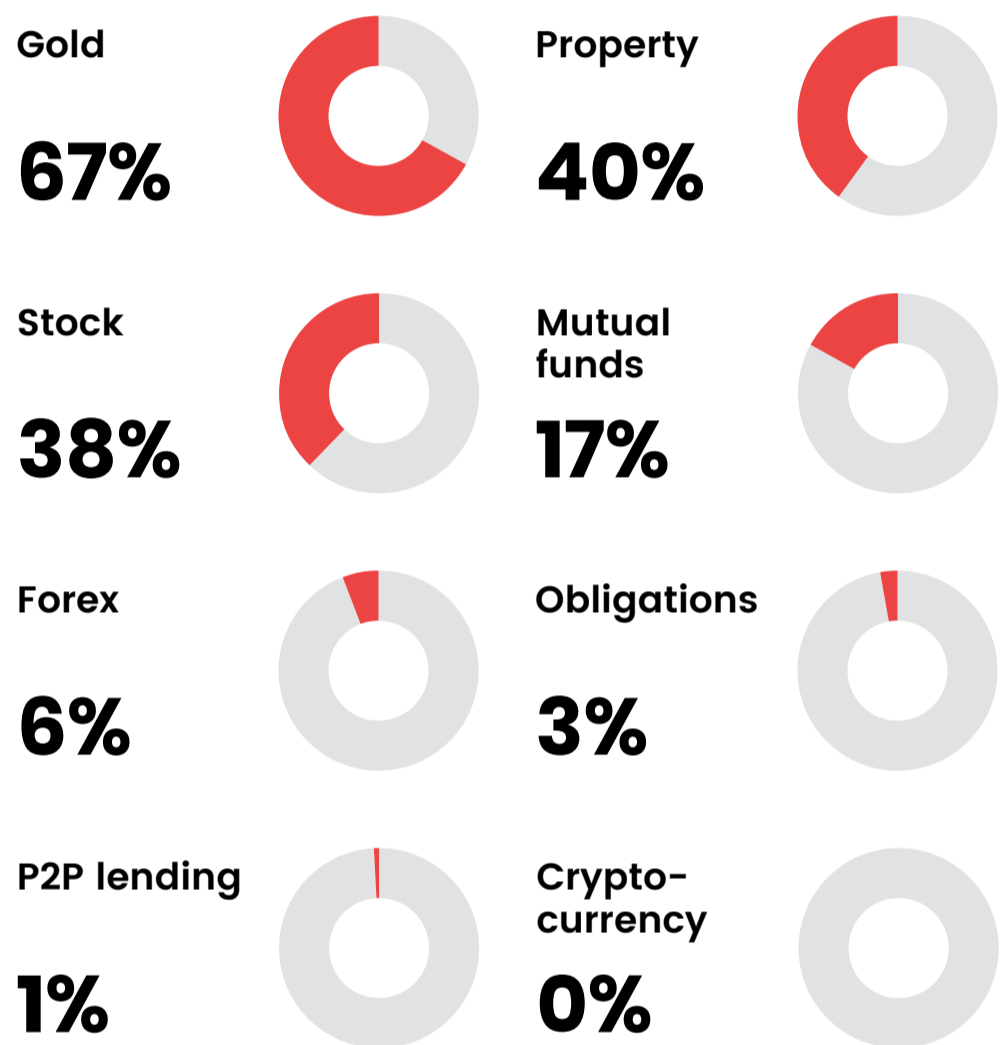


Image 6.15
Popular investment among Indonesian Gen Z

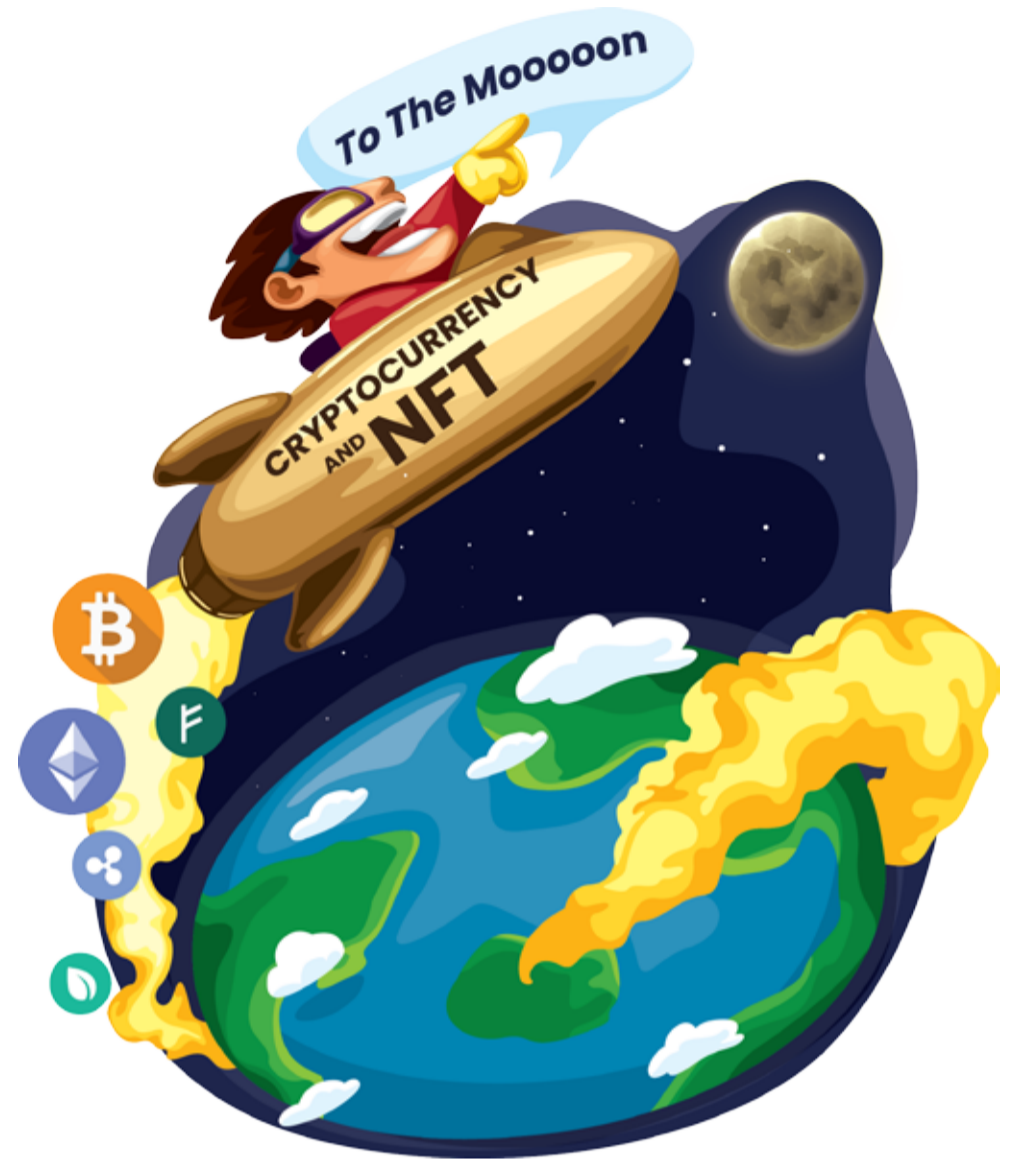


Crypto and NFT investing as a new alternative asset to ‘get rich quick’ promise

Cryptocurrency and NFT have become a new trend in the economy, particularly in the last few years. Although Bitcoin, the first cryptocurrency, was first released in 2009, it only gained popularity in Indonesia recently. Interests in NFT (non-fungible token) among Indonesians reached an all-time high in January 2022 after a university student named Ghozali sold a collection of his selfie, consisting of 933 photos that he took every day from 2017 to 2021 – hence the term Ghozali Everyday. He quickly became rich after getting thousands of dollars from the sale.

The success of Ghozali and others who have profited from cryptocurrency helps lead to a confidence among Millennials of cryptocurrency as a form of investment. The Trade Ministry’s Futures Exchange Supervisory Board (Bappebti) revealed that the number of cryptocurrency investors in Indonesia had skyrocketed from 532,102 in 2021 to 12.4 million people in February 2022. This means that there are more crypto investors than stock investors, which stands at 8.1 million people.

However, some people exploited the trend and lack of understanding among new investors and used cryptocurrency as a scam. The Indonesian Financial Services Authority (OJK) has issued a warning of a scam that uses cryptocurrency as a front, while being a Ponzi scheme in reality. Cryptocurrency has also been used to hide one’s illicitly gained wealth or money laundering. For instance, Indra Kesuma, better known as Indra Kenz, who was arrested earlier this year for binary trading fraud, is suspected to have hidden his wealth as cryptocurrency assets. Another well-known case involving an internet celebrity Doni Salmanan, who was also arrested this year for money laundering charges, is also suspected to involve cryptocurrency.



What do Indonesian Gen Z think of cryptocurrency?

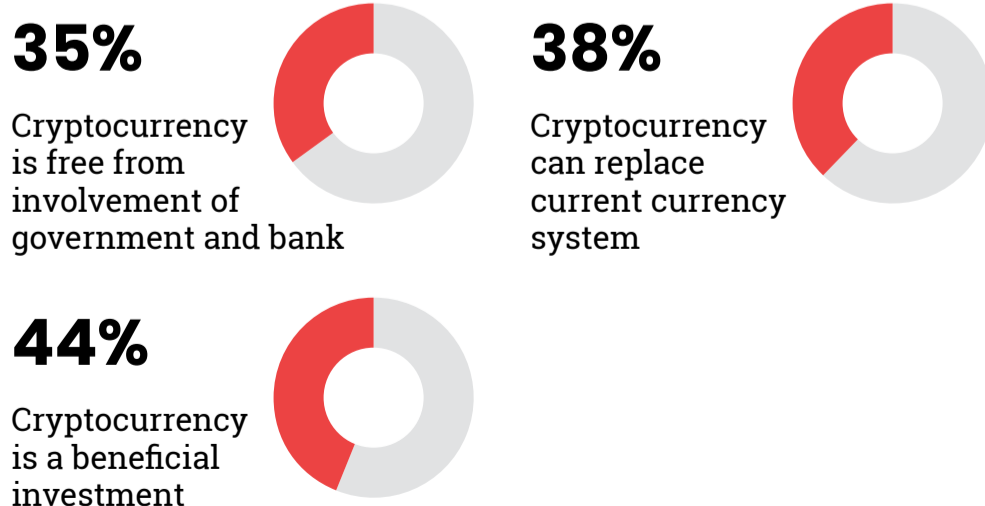


Image 6.16
What Indonesian Gen Z think of cryptocurrency

Gen Z who don’t know anything about cryptocurrency:

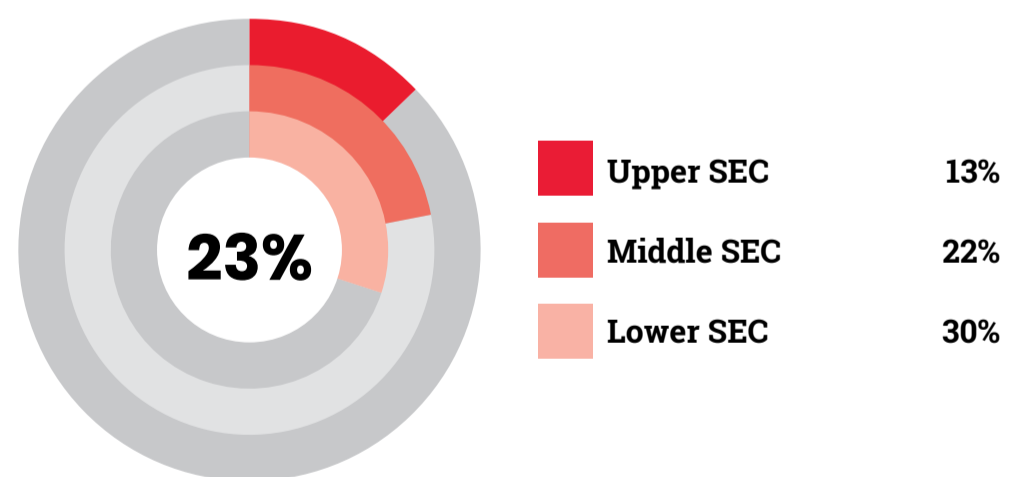


Image 6.17
Gen Z who don’t know anything about cryptocurrency

Only 23% of Gen Z say that they do not know anything about cryptocurrency. The awareness over cryptocurrency is correlated with one’s socio-economic class, as one becomes more affluent, the less likely one is to know nothing about cryptocurrency. In our survey, only 13% of Gen Z from the upper SEC admit that they know nothing about cryptocurrency, compared to 22% from the middle SEC and 30% for the lower SEC.

79% of Gen Z have used e-commerce

The use of e-commerce has been more prevalent in recent years, even more after the pandemic hit the country. The shift to e-commerce has even helped many local merchants to survive the pandemic. According to e-Conomy 2021 report by Google, "In Indonesia, 28% of digital merchants believe that they would not have survived the pandemic if not for digital platforms."

According to Gen Z in our survey, Tokopedia, Shopee, and Lazada are the top three e-commerce platforms. Many Gen Z are also using more than one platform for their online shopping. The adoption of e-commerce among the upper socio-economic classes is the lowest, with 26% saying that they are not using any e-commerce platforms, as opposed to 19% and 23% among the middle and lower SEC. Perhaps, it's because for the upper SEC, malls and offline stores are more accessible and the price difference does not really matter, hence less incentive to shop online.

Gen Z who are not using any e-commerce platform:

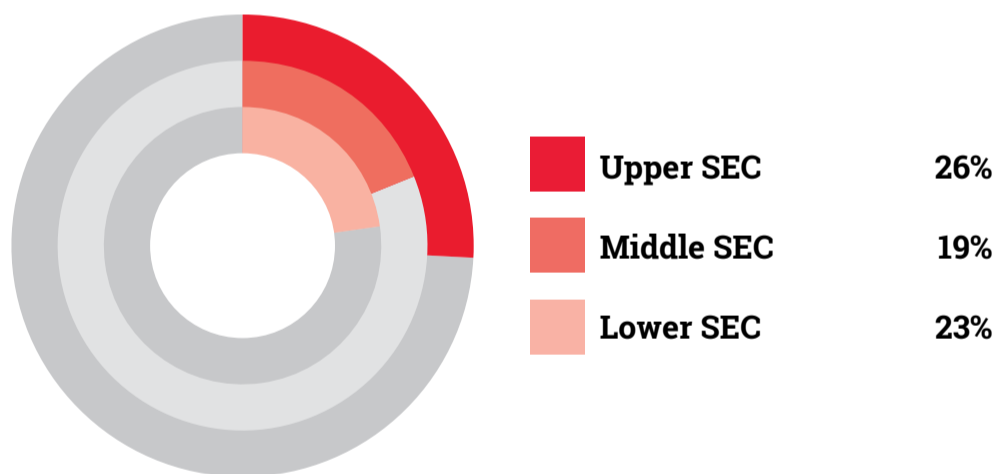


Image 6.18 Gen Z who are not using any e-commerce platforms

Top e-commerce platform:

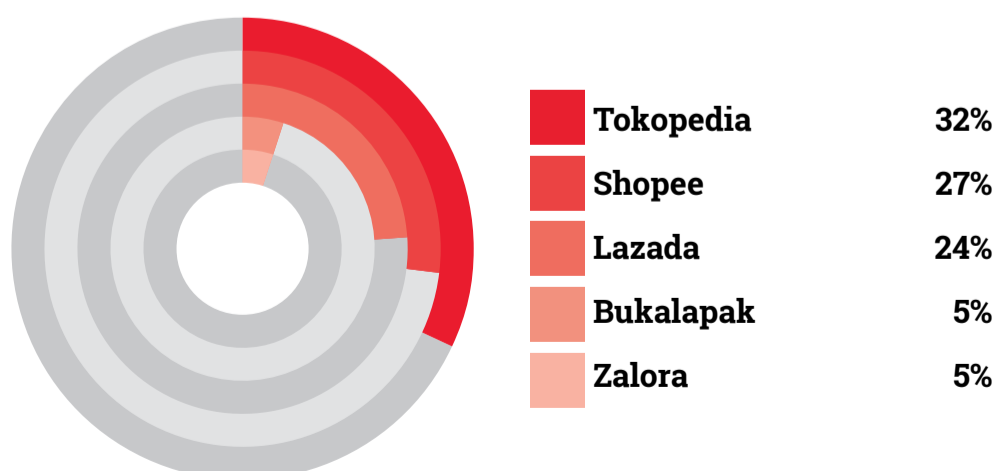
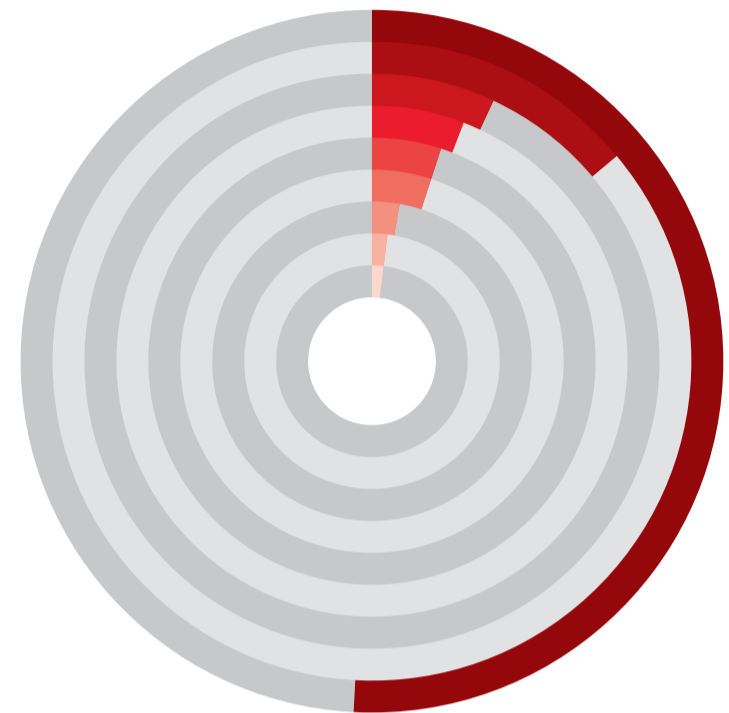


Image 6.19 Top e-commerce platform

When it comes to online shopping, fashion becomes the most sought-after category, followed by personal care and home appliances. It seems that during the pandemic, people are taking care of their personal appearance and their home first – even if there's nowhere to go, or precisely because of it.



Fashion	51%	Food & beverage	5%
Personal care	14%	Gaming	3%
Toys & hobby	7%	Handphone & tablet	2%
Electronic	6%	House appliance	2%
Automotive	5%		

Image 6.20 Popular category when online shopping

Gen Z still prefer to pay using cash on delivery (COD) method when they are shopping online. The next top payment methods are e-wallet, bank transfer via virtual account, and PayLater services.

Buy now pay later (BNPL) method is gaining a number of users among Indonesian Gen Z, even more than credit cards. BNPL might be more enticing to Gen Z who are still not qualified for a credit card and the service is also integrated to other platforms that Gen Z are already using, from e-commerce to food delivery apps.

Method	Upper	Middle	Lower
E-Wallet (GoPay/OVO/etc)	25%	22%	18%
PayLater	6%	6%	3%
Debit or Credit Card	1%	2%	1%
Cash on Delivery (COD)	56%	54%	68%
Transfer via Virtual Account	6%	7%	3%
Transfer Bank (Manual Verification)	3%	2%	2%
Cash Through Retail Stores	3%	6%	5%

When almost virtually everything is available online, consumers have unprecedented choice in how they spend their money. Brands with strong legacies must compete against newer ones in the fight of people’s attention, and hopefully, their purchase. When we ask Gen Z on the brands that they know in various sectors, we find that mostly, the legacy and multinational brands still win.

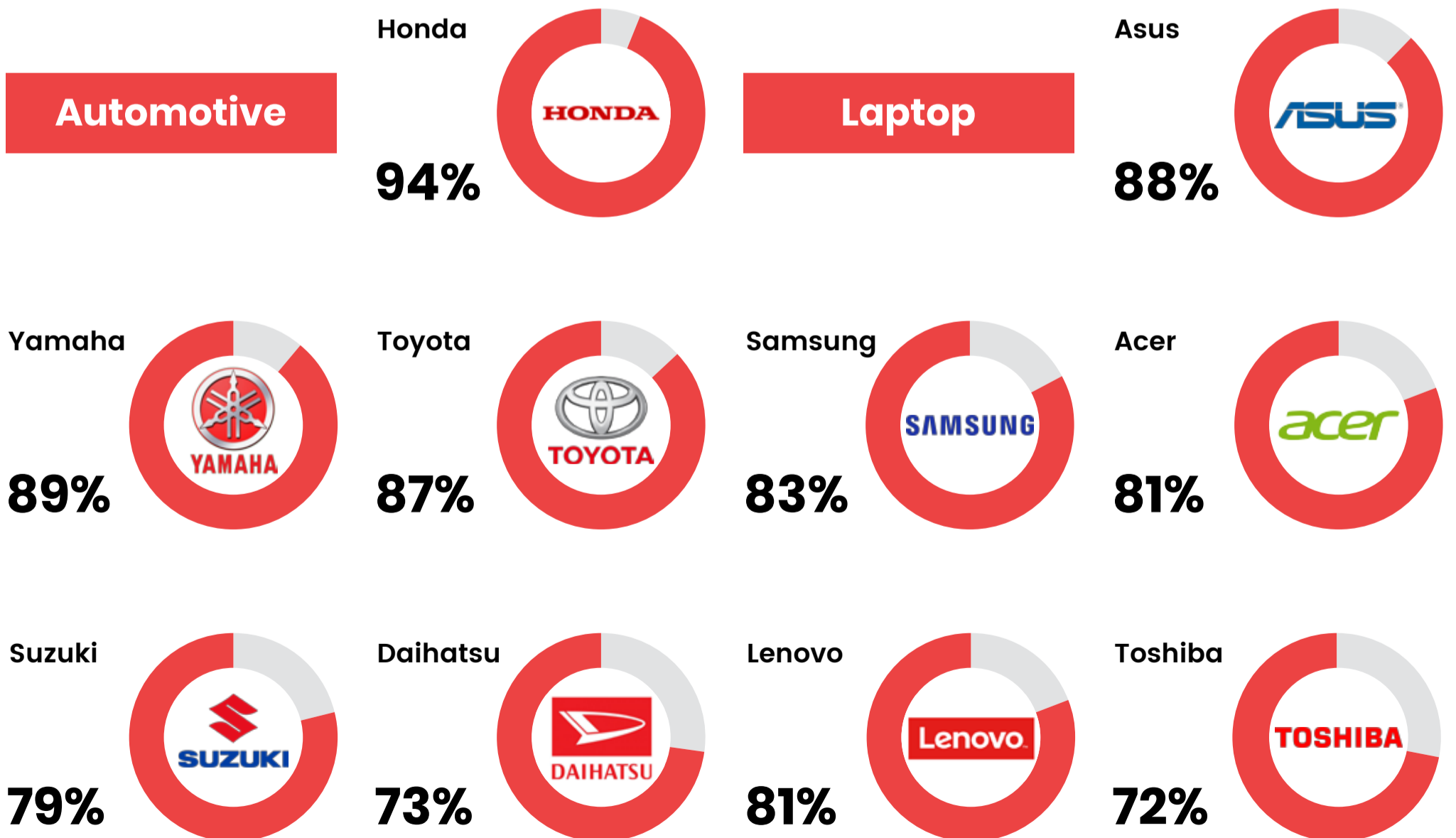
However, in fashion, some local brands are running against international fashion giants. While fast fashion brands such as Zara, H&M, UNIQLO, and Pull & Bear and luxury brand Louis Vuitton still dominate the top 5, Indonesian Gen Z are also noticing local brands such as Erigo, Jiniso, Green Light, and Screamous make it to the top 10 list. In footwear, Indonesian Gen Z are noticing Ventella, while it’s still far behind the likes of Nike and Adidas.

Perhaps, other brands can learn from the success of Wardah, which becomes the top of mind in beauty among Indonesian Gen Z. The locally made and owned brand is only second after Unilever’s Ponds in terms of popularity by 2% margin after establishing itself as the pioneer of halal cosmetic products in Indonesia. In coffee, local brand *Janji Jiwa* is also trailing behind Starbucks in terms of popularity among Gen Z. *Janji Jiwa* has more than 1,000 outlets in Indonesia, far surpassing that of Starbucks at 478, while offering coffee and other drinks at much more affordable price points.

Of course, when we talk about local brands, we cannot do so without mentioning Indomie – which almost becomes a source of national pride at this point. The brand’s popularity remains unbeatable in the instant noodle category. Indomie has even penetrated foreign markets, for instance in Nigeria. Recently, a restaurant in Australia made the news after it started offering Indomie *goreng* (fried noodle) flavored ice cream.



It’s a brand’s, brand’s world



Gen Z has high trust on influencer-related brands

The story of Erigo, Scarlett, Somethinc, Jiniso, Everwhite, and Avoskin in making it to the top of minds of Indonesian Gen Z has another side to it. Aside from the quality of the product itself, Indonesian Gen Z have high trust in brands that have close relationships with social media influencers, in terms of ownership or partnership.

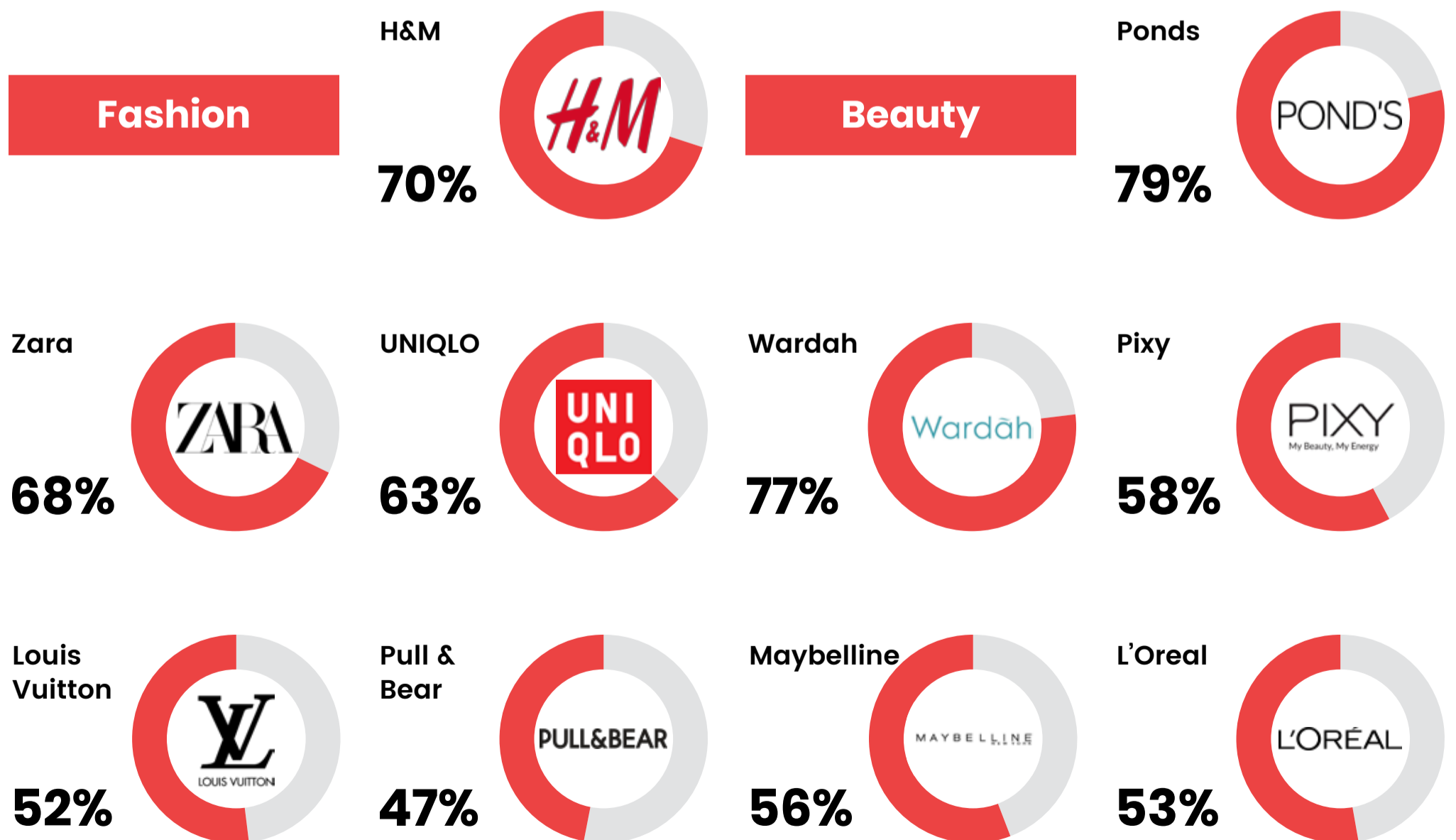
Erigo made the news in 2021 after the brand participated in the renowned New York Fashion Week in the United States. The brand did not rely on conventional media to spread the news, but utilized a group of social media influencers that it invited to New York to help promote the brand and their latest collection. In the same year, Erigo also partnered with Raffi Ahmad, arguably the most famous celebrity and social media influencer, for a marketing stunt in which the brand sent a container filled with its clothes to Raffi Ahmad's house.

Beauty brand SOMETHINC has partnerships with Indonesian social media influencers and Korean idols and celebrities to gain more impact and publicity. In an attempt to be more inclusive, SOMETHINC collaborated with Chinese-Indonesian with Papuan descent Lifni Sanders, who previously had demanded for local beauty products that catered to the darker skintones of many Indonesian – especially those with Eastern Indonesian blood.

To seize the attention of K-Pop fans, SOMETHINC has also partnered with boyband NCT Dream. Following the success of Korean actress Han So Hee in several dramas, namely The World of the Married and Nevertheless, SOMETHINC also launched a partnership with her under the tagline of "To The World of Beauty".

Having large social media following, several Indonesian social media influencers have started their own brands. A case in point is Jerome Polin and his tea drinks brand, Menantea, which he co-owns with his brother, Jehian. Menantea's official Instagram account achieved 50,000 followers in hours – which was unprecedented among other local brands. Jerome and Jehian used their YouTube account to promote the brand right from its inception, which deepened the emotional attachment from their followers.

Ultimately, all these brands have in common is the expertise on social media as a marketing platform and first-hand knowledge on what Gen Z likes and cares about. These brands gain an almost cult-like following because they know how to talk to and communicate their story and values to their audience, effortlessly and with authenticity – at least on the surface.



Footwear

Adidas

91%



Banks

BCA

94%



Nike

90%



Reebok

74%



BRI

92%



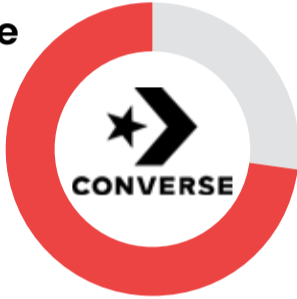
MANDIRI

88%



Converse

73%



Puma

69%



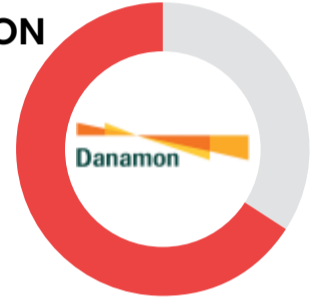
BNI

88%



DANAMON

66%



Airlines

Garuda

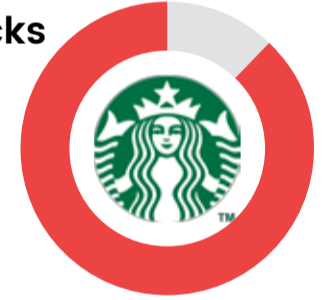
94%



Coffee shops

Starbucks

88%



Lion

86%



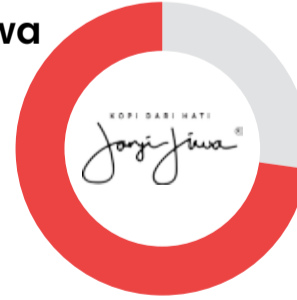
Air Asia

78%



Janji Jiwa

73%



J.Co Donuts & Coffee

65%



Citilink

71%



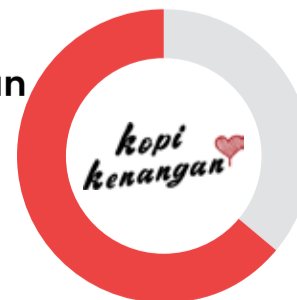
Batik

67%



Kopi Kenangan

64%

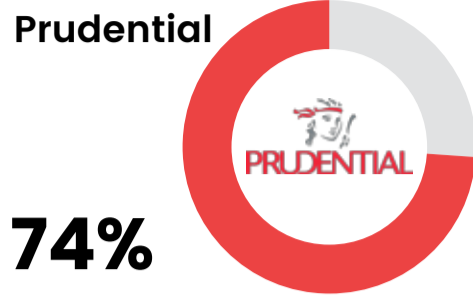


Excelso

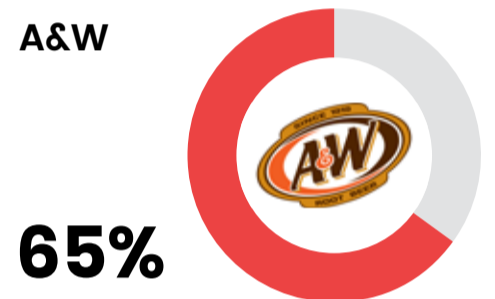
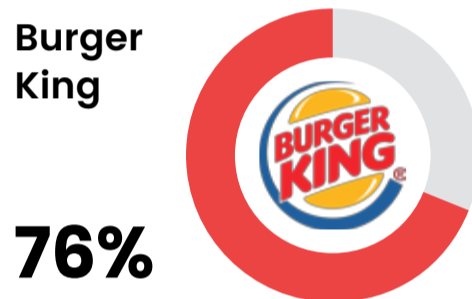
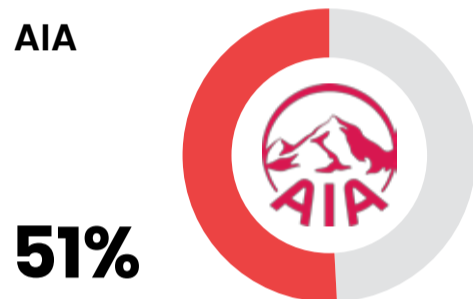
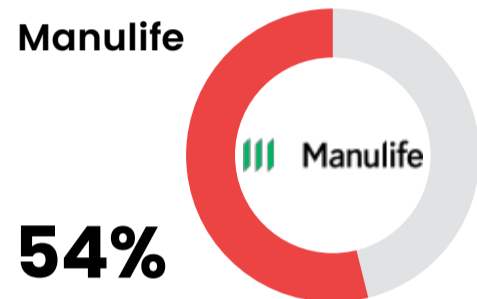
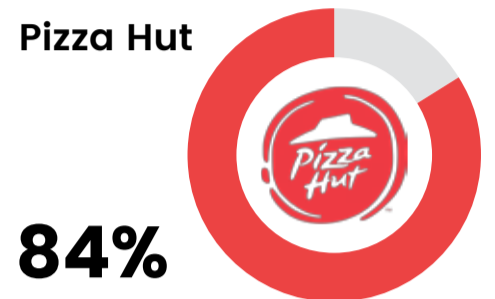
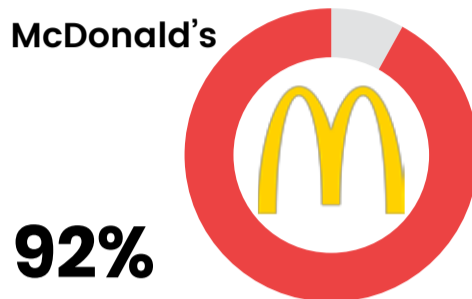
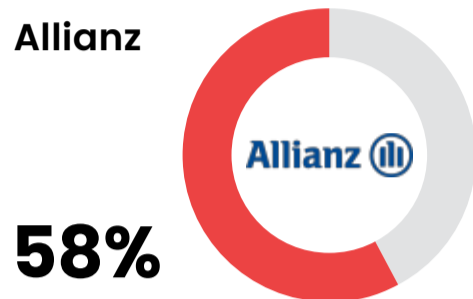
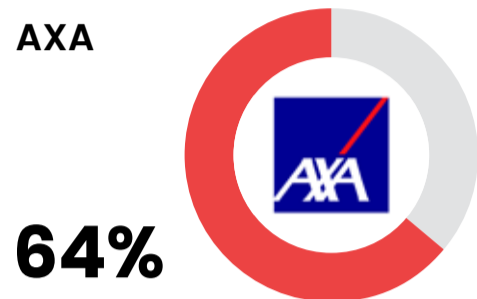
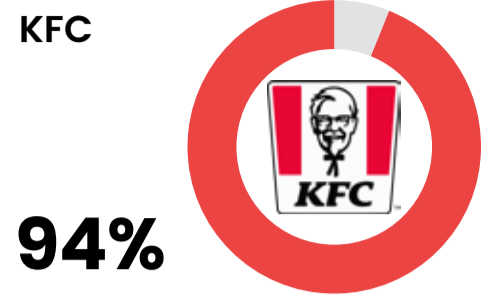
47%



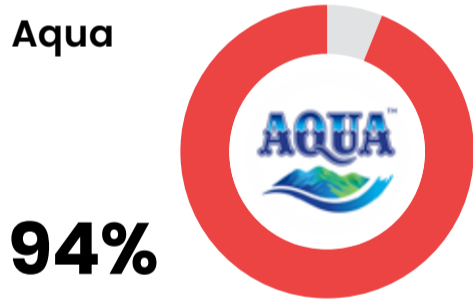
Insurance



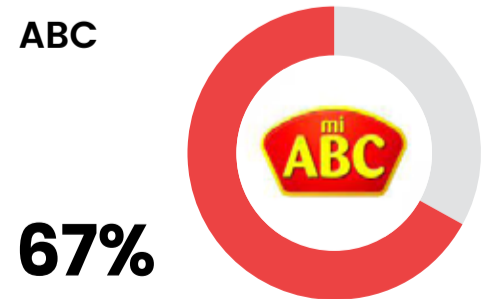
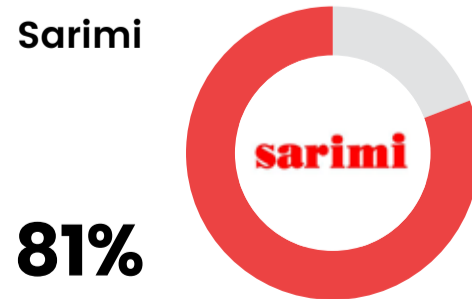
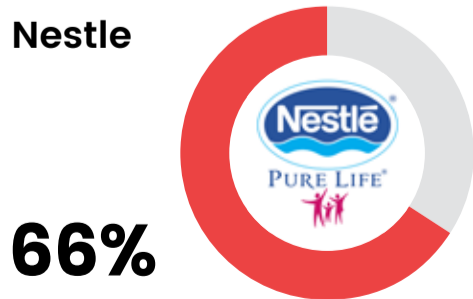
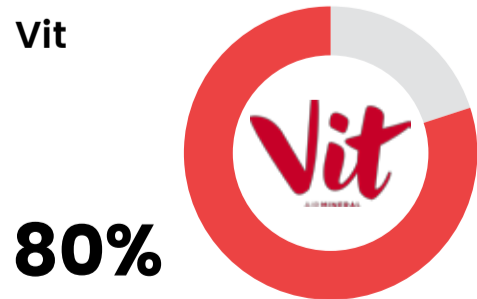
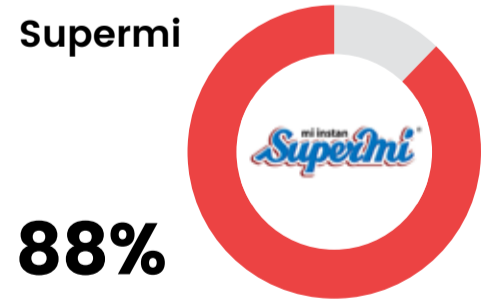
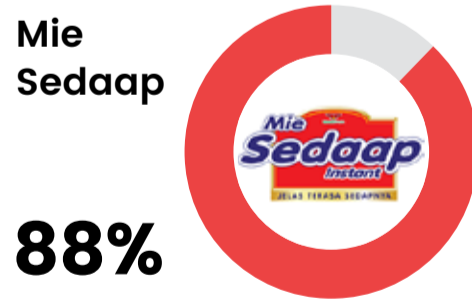
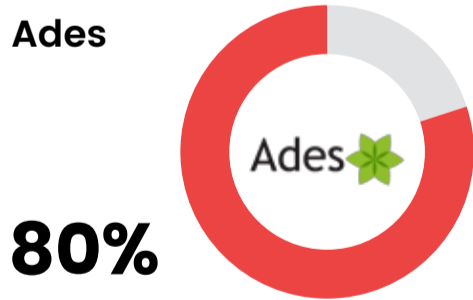
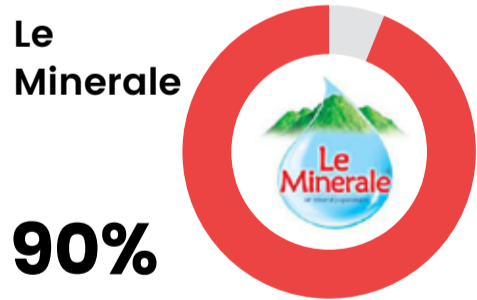
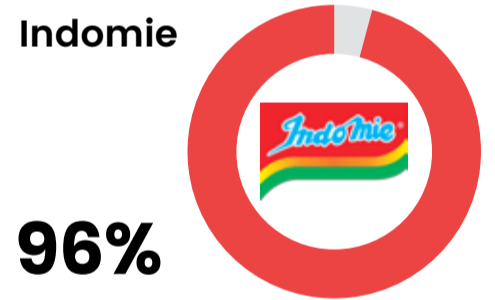
Fast food



Mineral waters



Instant noodles





POLITICAL VIEWS



77% of Gen Z think that Indonesia's political system is improving, and it will move the nation forward

"When you've hit rock bottom, the only way is up," the saying goes. As Gen Z is known for their dark and twisted sense of humor, this saying also reflects their attitude toward the future. 61% of Gen Z in the survey say that Indonesia is currently in a bad condition, but optimism still looms over Gen Z's perception of the future of the country.

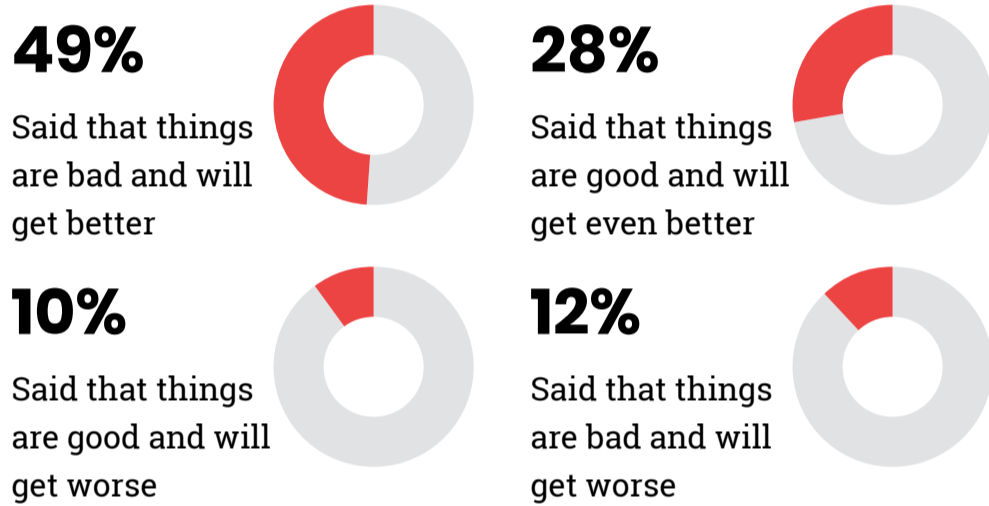


Image 7.1
Gen Z's view of the country condition.

49% of Gen Z in the survey say that they had seen better days for Indonesia, but believe that the country will get better. 28% even say that Indonesia is in a good condition which will get even better.

Only 22% of Gen Z say that the situation of the country will get worse in the future. One in 10 Gen Z believe that Indonesia is in a good condition, but things will take a wrong turn. 12% of the Gen Z in our survey say that things are bad and will continue to get worse in the future.

Indonesian Gen Z put their hopes in the inherent characteristics of the country itself. Diversity becomes top reason for optimism according to Gen Z, which is encouraging after countless issues of intolerance and interethnic conflicts that occurred in the country after Reformasi. Gen Z also believes in the unity of Indonesia and security of the country, which shows separation or armed conflicts are not something that Gen Z worries about.

However, in terms of the economy, 10% of Gen Z disagree that economic conditions will be better. This is probably related to the view belonging to 16% of Gen Z who disagree that corruption eradication is possible. This pessimism is rather understandable, as when many Indonesians experienced economic hardships amid the pandemic, former social minister Juliari Batubara embezzled assistance that was supposed to help the poor.



The government needs to strengthen the institutions that are required for a clean government in order to provide a safety net and better economic conditions for many Indonesians.

7 reasons for optimism, according to Indonesian Gen Z:

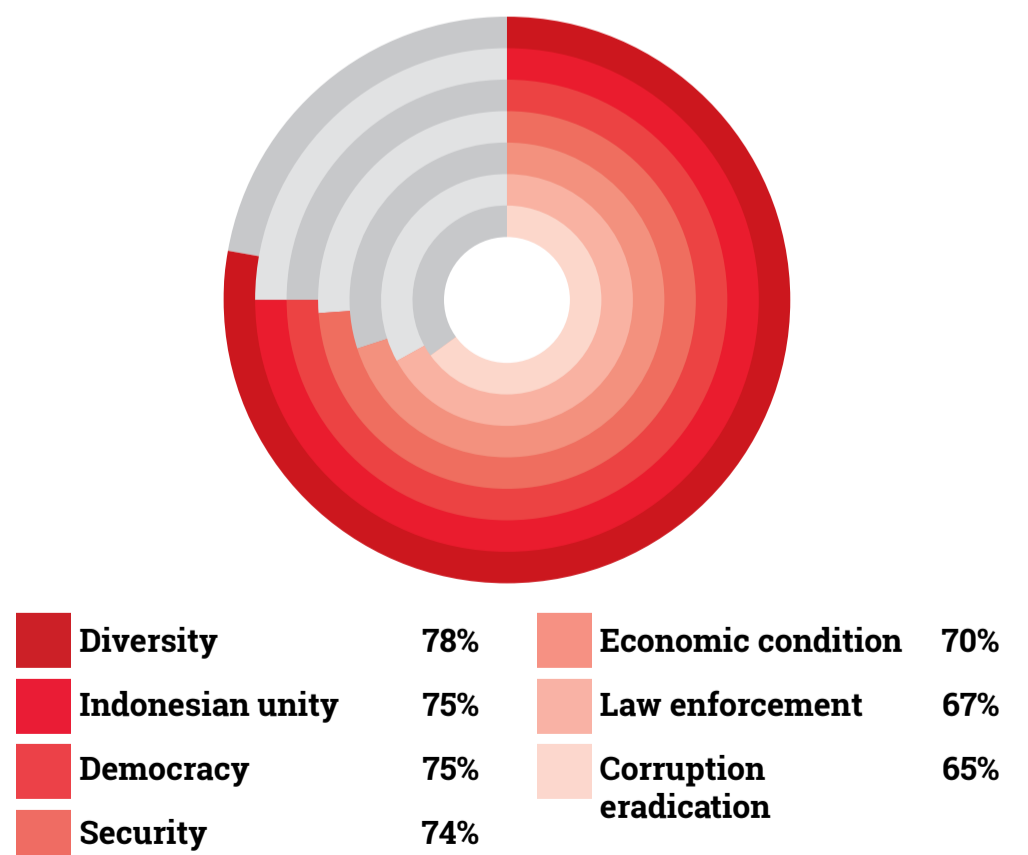


Image 7.2
7 reasons for optimism



Gen Z: The motor of ‘Reformasi Dikorupsi’ rallies

Our finding shows that news consumption becomes more prevalent as the news becomes freely accessible on digital media and TV, unlike the previous generation where only a selected few read the daily papers and owned TV.

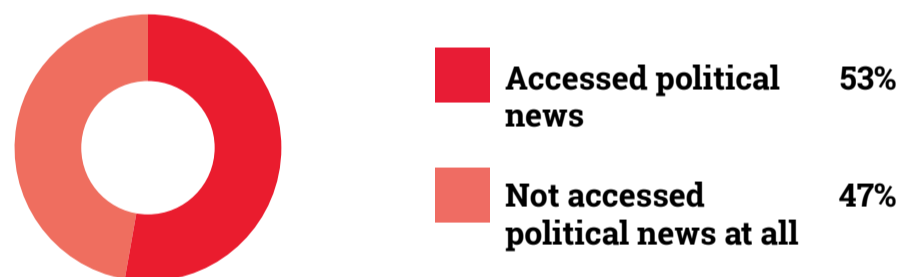


Image 7.3
Gen Z who accessed political news

More than half (53%) of Gen Z say that they accessed political news with varying frequency. 47% say that they have never accessed political news at all. Young adults are more likely to read political news compared to their late teens counterparts, as the rate of young adults who never access political news is lower than late teens.

However, this does not mean that the late teens do not care about politics. In 2019, Indonesian university students from 26 universities under the BEM SI, held the biggest student rallies after 1998 – popularly known as the *Reformasi Dikorupsi* movement. In 2020, in the middle of the pandemic, the students held another rally to protest the deliberation of Omnibus Bill, which was later passed into Job Creation Law. Then in 2022, the students under BEM SI once again took to the streets to protest the postponement of the 2024 general election, which will effectively give President Joko “Jokowi” Widodo a third term, which is deemed unconstitutional in Indonesia.

Emil Elestianto Dardak,
Deputy Governor of East Java

“It’s really harmful when politics becomes a performance or even entertainment, which leads to political figures seeking out instant results [for popularity] and structural and fundamental issues are marginalized. It’s encouraging that today’s youth puts more attention to politics as a social control mechanism to the government. We need more advocacy and civic space. However, I hope that citizens do not see themselves as an opposition but rather as an ally against those who profiteer from and pursue their personal interests above the public’s.”



71% of Gen Z say they are ready or neutral for 2024 general election

As the discourse regarding the postponement of the 2024 general election is becoming louder, what Gen Z thinks about the election itself matters. Minister Luhut Binsar Pandjaitan justifies the postponement by saying that it is supported by 110 million netizens, a claim that has been refuted by experts.

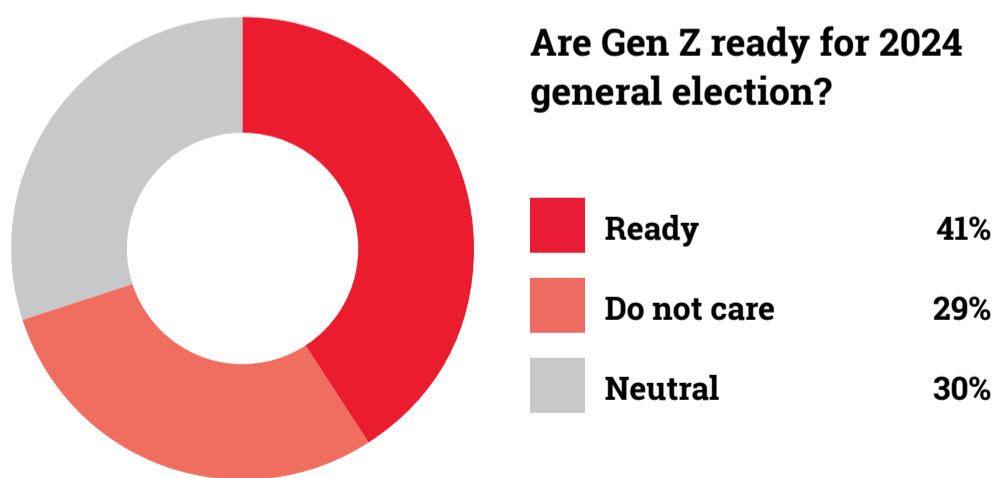
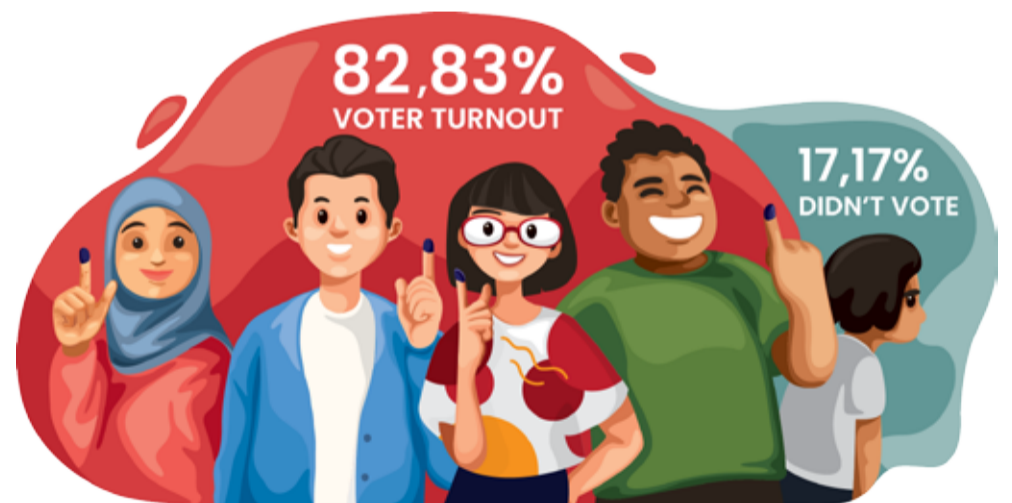


Image 7.4
What Gen Z think about the 2024 general election

Among our sample population, 41% of Gen Z say they are ready for the 2024 general election. 29% say that they do not care while 30% say they remain neutral.



During the latest general election in 2019, the voter turnout was 82.83% – reflecting an active democracy. If the stakes are high enough, even those who say they are not interested can feel the urgency to go to the poll and cast their ballots. As Gen Z has shown active participation in politics by joining student protests, we are optimistic that when it matters, Gen Z will do their civic duty to help maintain a healthy democracy.

Vision, integrity, and experience are what Gen Z look for in a leader

An ideal political candidate according to Indonesian Gen Z is the one who has a clear vision for the country, integrity so that they won't be corrupt, and political experience.

Even though 61% of Gen Z say that they choose a political leader who has the same religion as they do, when religion is set against other factors, its importance becomes relatively weak. This shows that at the end of the day, a candidate's personal capability is more significant in securing votes compared to background, religion, popularity, ethnicity, and even political parties they belong to.



■ Vision and mission	80%	■ Religion	43%
■ Integrity (not corrupt)	78%	■ Popular/famous	33%
■ Political experience	73%	■ Political parties	29%
■ Background	63%	■ Ethnic group	12%

Image 7.5
What Gen Z look for in a leader

Jokowi, Prabowo, and Ganjar remain the most popular political figures for Gen Z

President Joko "Jokowi" Widodo, Defense Minister Prabowo Subianto, and Central Java Governor Ganjar Pranowo enjoy the highest popularity among all politicians in our list.

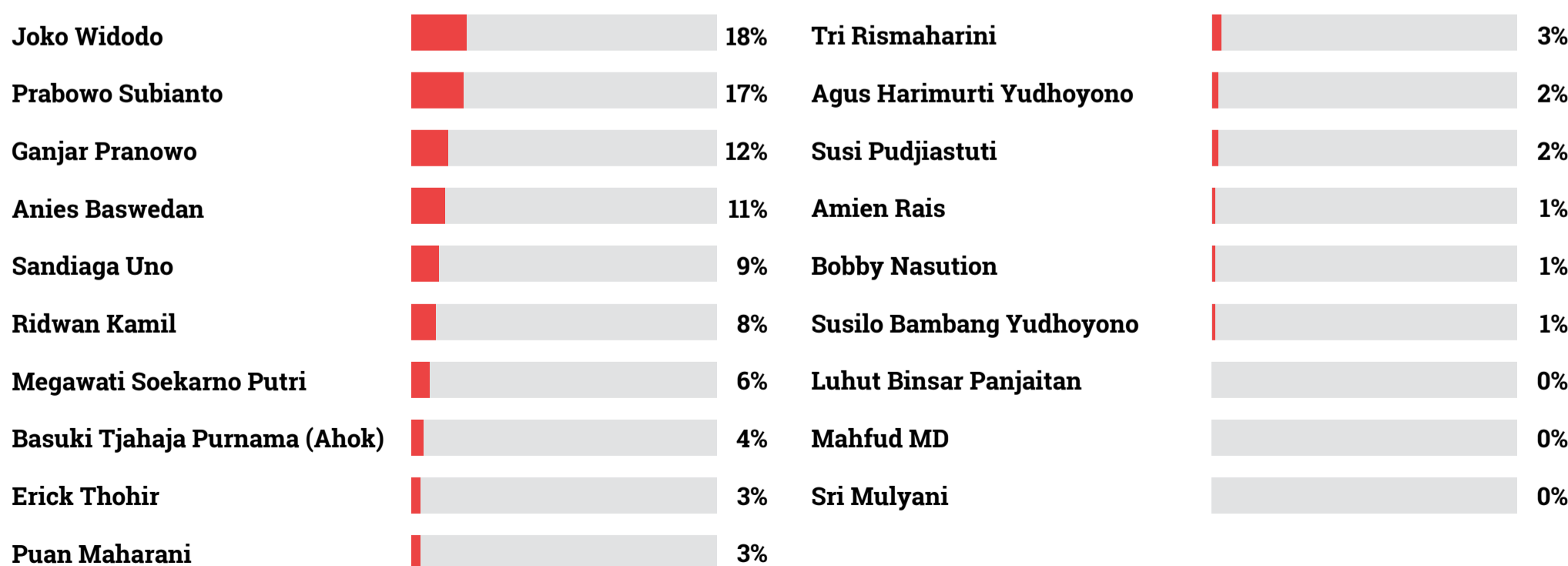


Image 7.6
Political figures popularity by Gen Z

Ganjar Pranowo is the most popular presidential candidate for 2024

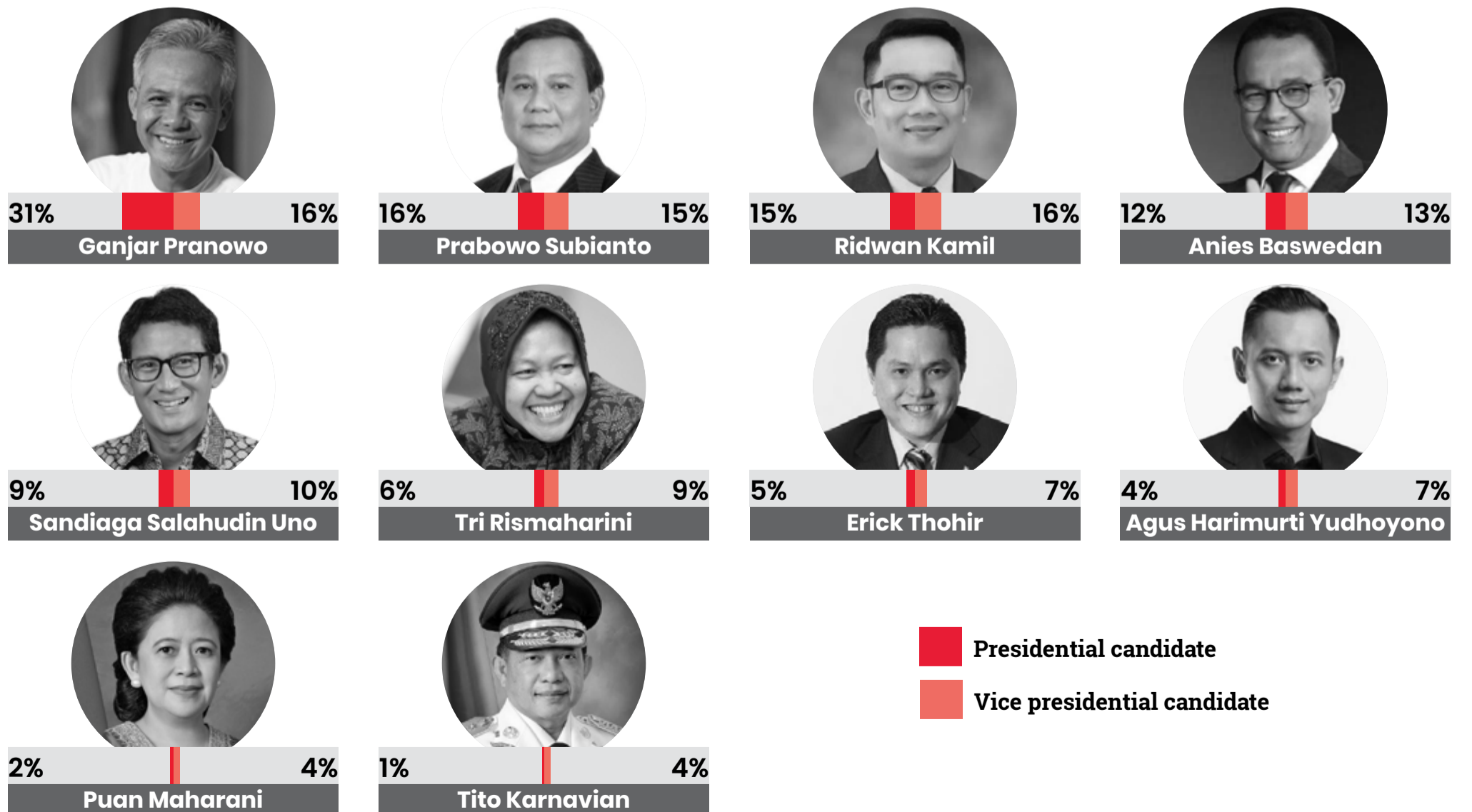


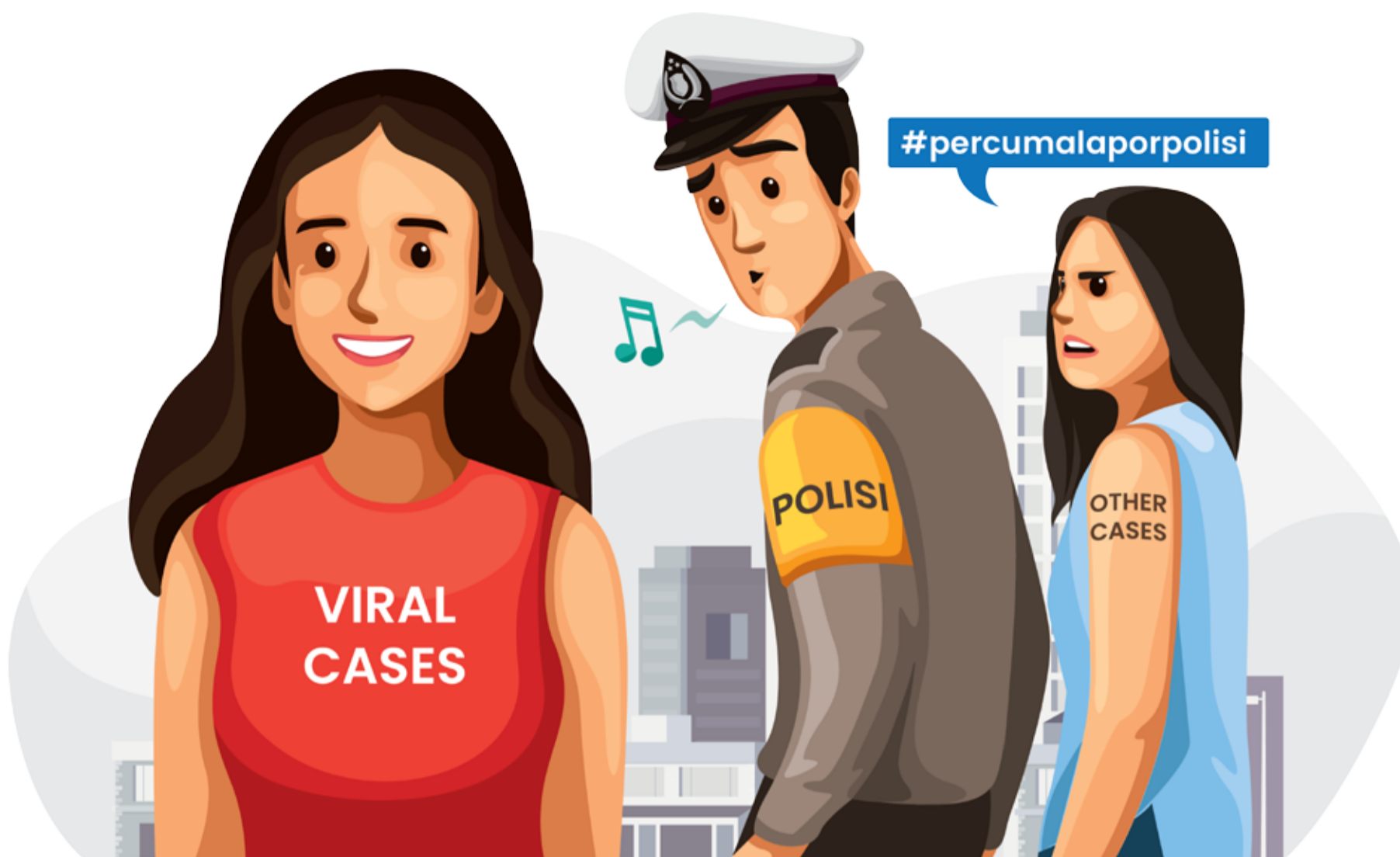
The rise of Jokowi from a Surakarta mayor to Jakarta governor to presidency has shown that a regional figure can have a nationwide influence. Our finding shows that Indonesian Gen Z are familiar with such regional figures, like Central Java Governor Ganjar Pranowo, former Bandung mayor and West Java Governor Ridwan Kamil, Jakarta Governor Anies Baswedan, and former Surabaya mayor and Social Affairs Minister Tri Rismaharini.

Of these regional figures, Ganjar Pranowo arguably has the best chance of winning the presidency in the 2024 presidential election. His popularity among Gen Z is almost twice that of the second most popular figure, Prabowo Subianto, who has contested in the presidential election three times: twice as presidential candidate in 2012 and 2016 and once as vice presidential candidate with Megawati Soekarno Putri in 2009.

Other notable figures that Gen Z think have a chance in 2024 presidential election are former Jakarta deputy governor who is now Tourism and Creative Economy Minister Sandiaga Salahudin Uno, State-Owned Enterprises Minister Erick Thohir, former military officer and leader of Democratic Party of Indonesia Agus Harimurti Yudhoyono, House Speaker Puan Maharani, and former national police chief and Home Affairs Minister Tito Karnavian.

Political figures as presidential and vice presidential candidate





#PercumaLaporPolisi: Growing disillusionment in the law enforcement system



How the law enforcement performed according to Gen Z:

- Good or very good 41%
- Bad or very bad 19%
- Between good and bad 40%

Image 7.7 What Gen Z think about the law enforcement's performance

In October 2021, the #PercumaLaporPolisi (there's no use going to the police) hashtag became trending after public journalism initiative Project Multatuli published a story about how East Luwu regional police allegedly mishandled sexual abuse case of three children by their own father. After the story went viral, people started sharing their own experience and disappointment in dealing with the law enforcement with the #PercumaLaporPolisi hashtag.

National Police Chief General Pol. Listyo Sigit Prabowo said that the #PercumaLaporPolisi was a reminder for the police to evaluate their performance and handling of cases reported by the public.

Only 41% of Gen Z think that the law enforcement have been performing good or very good. A large part of Gen Z (40%) are ambivalent, saying it's between good and bad. 19% say that it's bad or very bad.

SELULUHAN



WARRIOR



Gen Z is the biggest generation in Indonesia, according to the 2022 population census. Yet, the members of this generation are often misunderstood and reduced to stereotypes and ideals that do not help us understand who they truly are. The Indonesian Gen Z Report 2022, the first of hopefully many to come, is our attempt to shed some light on this biggest generation, from the late teens to those who have started working and building their own family, from the most tech-savvy ones to those who are still struggling to adapt to the digital age, from their attitude toward K-Pop to how they utilize social media, in short, from A to Z – obviously with some gaps in between.

What we find is a picture of a generation that needs a lot of help, from mentoring to systemic changes. Having lived through several turbulent periods in time since birth, Gen Z deserves stability and security in their future. Here what we think can help Gen Z thrive:

Invest in Gen Z early to yield maximum results for the demographic bonus.

Gen Z are starting their life as young adults at a discouraging time. Daniel H. Pink in *When: The Scientific Secrets of Perfect Timing* argued that unfavorable initial conditions might have a huge influence over people's life. While we are seeing the end of the pandemic and the return of "normal", its effect might linger on Gen Z in the years or even decades to come. Everyone from the government, employers, brands, to friends and families must consider this into account during their interaction with Gen Z.

Have more empathy; give room for Gen Z to learn and grow from their mistakes. Social media has made the social cost of making a mistake or being young and stupid incredibly high. We have seen far too many people become public enemy or joke, bullied and even doxxed for a mistake that unexpectedly blows up overnight. The experience can be traumatizing, if not downright harmful. Surely everyone knows when to draw the line between actual crimes and silly mistakes, but apparently, not anyone can exercise restraint and have empathy for others, especially those who are still younger.

Provide channels and nudges to help build healthy financial habits among Gen Z. It's easy to disregard Gen Z's lack of savings and investments as a result of their consumptive spendings. While financial literacy is a must, Gen Z needs a helping hand in the form of programs that are designed to make it easier for them to start saving and invest their money. As Gen Z are still very young, they might fall into the temporal discounting bias that leads to more spending in the present compared to savings for the future. The government should reach out to those who are currently being left out from the social programs such as *BPJS Kesehatan* and *Ketenagakerjaan* as well as the *Jaminan Hari Tua*, or establish channels that will make it easier for them to access these social programs.

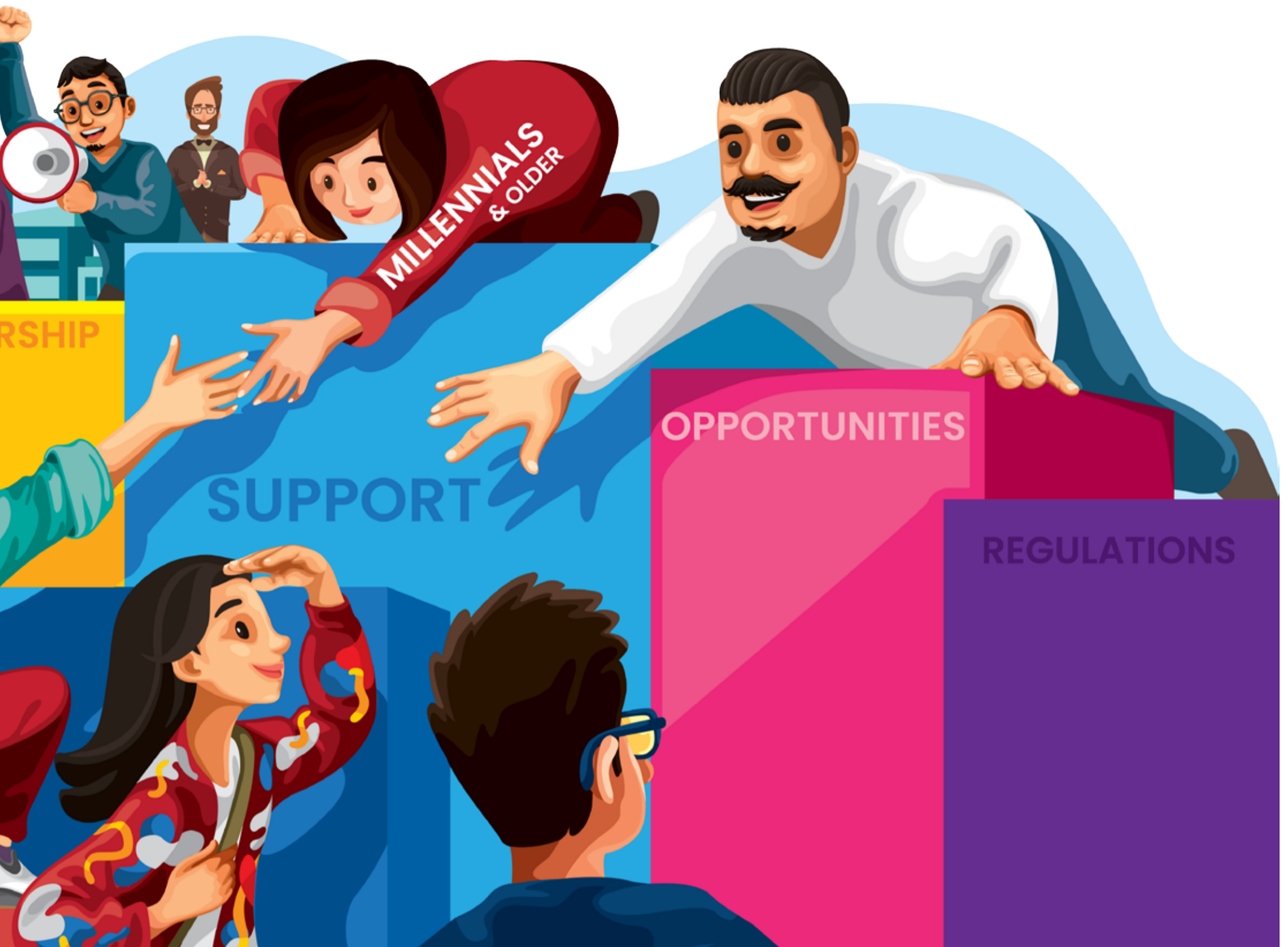


Share basic digital literacy skills and provide more accessible trainings.

There is still a huge digital gap between Indonesian urban and rural areas. Not all Gen Z are tech savvy, and the sooner we accept this, the sooner they can get help in order to catch up with those who have developed more advanced skills. Without help, in forms of trainings or education, many Gen Z will certainly fail to compete or adapt with the ever increasingly competitive job market. Digital literacy should involve more advanced skills such as technical understanding and critical thinking, and not just mindlessly consuming content on the internet and falling to scams.

In workplaces, employers can generate Gen Z's loyalty through meaningful interactions.

Gen Z are eager at their job and the older generation might encourage them to work, work, work, and work until they burn out. Compared to the Millennials or older generations, Gen Z still have many more decades to go through. It's certainly not wise for the workplace to let Gen Z get burnout so early in their career. Mentorships are good, but it should not only be limited to technical skills but also involve how to maintain a healthy work and life balance.



Act now for climate. Seeing that Gen Z have worries about climate change and how it will affect their future, brands should also be more sustainable and provide ways for Gen Z to do their part. Some companies, for instance, have allowed consumers to return plastic wastes for recycling or to count the carbon emissions from daily activities and then plant trees that can help absorb equivalent amounts of carbon. There really is no future on a dead planet.

Yes to more inclusive content, but filter out the junk news or content. We are living in the age of content, where information is plentiful and might even be overwhelming. Due to the decentralization of content-producing and news-making as well as the nature of social media itself, some Gen Z might be living in a content bubble and are only exposed to low-quality, hoax-ridden content. As the fourth pillar of democracy, the media has a responsibility to curate their content in order to educate Gen Z as a member of the public. In this sense, social media platforms should also do their part in repressing hoaxes and hate speech that can spread much faster than actual news.

Introduce and involve Gen Z in politics as early as possible by communicating in a personal and relatable way. Not only as a voter base that is only sought after nearing every election. Gen Z are worried about a lot of things, from affordable housing in urban areas and job security to climate change and religious tolerance.

Lend a hand and spread kindness. It's not okay when 2 in 5 Gen Z are not confident with the path Indonesia is going as this will certainly affect their well-being and decision making process. Considering that the Gen Z are part of the so-called demographic bonus in our country, whether they make or break it will have an impact on the whole society. Helping Gen Z is our shared responsibilities in the never-ending nation-building process, but those who are more privileged should do more. The first step? Lend a hand, help whoever might need your help, in any capacity that you have. Everyone can do something to help, and the act of helping itself is empowering for us and hopeful for others. The clock is ticking. Whether the Gen Z becomes a demographic bonus or a bust is in our hands.

Methodology

Quantitative Method

Source of Data: Populix

Interview Method: Offline face-to-face interview, with structured questionnaire on smartphones

Sampling Method: Multistage random sampling method

Total Sample: 1,000

Margin of error: <5%

Research Area: 12 cities and agglomerations in Indonesia

covering +- 44,800,000 Indonesians in Greater Jakarta, Greater Bandung, Greater Semarang, Greater Yogyakarta, Greater Surabaya, Greater Denpasar, Medan, Palembang, Solo, Banjarmasin, Balikpapan, and Makassar

Fieldwork Period: 27 January – 7 March 2022

Qualitative Method

In-Depth Interview: Interviews by IDN Times, FORTUNE Indonesia, ICE, Popbela.com, Popmama.com, Yummy

In-Depth Survey: 8 in-depth surveys and interviews

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IDN Research Institute

IDN Research Institute is an independent think-tank that informs the public about issues, attitudes and trends shaping Indonesian Millennials and Gen Z through our research reports and advocacy events. We conduct public opinion polling, demographic research, content analysis and other data-driven social science research. We generate a foundation of facts that enriches public dialogue and supports sound decision-making. We are committed to meeting the highest methodological standards and exploring the newest frontiers of research. We are led by a team that combines the observational and storytelling skills of journalists with the analytical rigor of social scientists.

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