





# Index

|                          |          |
|--------------------------|----------|
| <b>Executive Summary</b> | <b>1</b> |
|--------------------------|----------|

## **Personal Values and Family** | **5**

|                                 |           |
|---------------------------------|-----------|
| <b>Marriage and Family</b>      | <b>07</b> |
| <b>Socio-Political Views</b>    | <b>10</b> |
| Concerns                        | 11        |
| Social inequality               | 12        |
| Mental health                   | 13        |
| Human rights and social justice | 15        |
| Climate change                  | 16        |

## **Education and Career** | **17**

|                           |           |
|---------------------------|-----------|
| <b>Education</b>          | <b>19</b> |
| <b>Career Preferences</b> | <b>21</b> |
| Hustling                  | 23        |
| <b>Creator economy</b>    | <b>24</b> |

## **Media Consumption and Online Behavior** | **27**

|                              |           |
|------------------------------|-----------|
| <b>Social Media Behavior</b> | <b>29</b> |
| Social media use             | 30        |
| Exodus to TikTok             | 31        |
| Short-form video             | 33        |
| Personal data awareness      | 34        |
| <b>Reading Behavior</b>      | <b>36</b> |

## **Entertainment, Hobby, and Leisure** | **39**

|                                    |           |
|------------------------------------|-----------|
| <b>Movie Watching Behavior</b>     | <b>41</b> |
| <b>Music Listening Behavior</b>    | <b>44</b> |
| <b>Podcast Listening Behavior</b>  | <b>46</b> |
| <b>Health &amp; Sport Behavior</b> | <b>49</b> |
| <b>Gaming Behavior</b>             | <b>52</b> |
| <b>Live Event Behavior</b>         | <b>54</b> |
| ‘Calo’ and Ticket Wars             | 55        |
| <b>Travel Behavior</b>             | <b>56</b> |
| Travel preferences                 | 57        |
| “Healing” on a budget              | 59        |

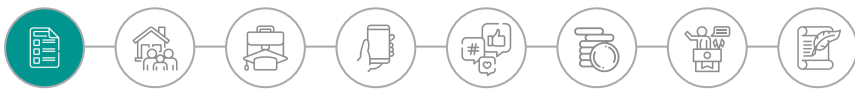
## **Finance and Shopping Behavior** | **61**

|                              |           |
|------------------------------|-----------|
| <b>Financial Preferences</b> | <b>63</b> |
| Income                       | 63        |
| Financial goals              | 66        |
| Homeownership                | 69        |
| <b>Shopping Behavior</b>     | <b>71</b> |
| Preferences                  | 71        |
| Gratis Ongkir and FOMO       | 73        |
| Influencer marketing         | 75        |
| Trends in beauty industry    | 76        |
| Buy Now, Pay Later           | 77        |
| Social media ads             | 80        |

## **Political Landscape** | **83**

|                                  |           |
|----------------------------------|-----------|
| <b>Democracy</b>                 | <b>85</b> |
| <b>2024 elections</b>            | <b>88</b> |
| Top issues and candidates        | 88        |
| TikTok election year             | 92        |
| <b>Voter education platforms</b> | <b>93</b> |

## **Author** | **95**



# About the Report

## 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. 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 significance 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, Gen Z surely has a 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 the Gen Z generation. Therefore, IDN Research Institute, in collaboration with Advisia 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.

Advisia conducted this research from May 29 to July 9 using a quantitative method with 602 respondents. The quantitative method was conducted using random sampling in 10 cities and agglomerations in Indonesia (Greater Jakarta area, Bandung, Semarang, Yogyakarta, Surabaya, Denpasar, Palembang, Medan, Balikpapan, and Makassar). Advisia continued with the qualitative method to dig more deeply about the Gen Z's perspectives on selected issues through in depth interviews with 30 participants. Then, IDN Research Institute developed and wrote the report based on the insight gained from data analysis.

IDN Research Institute also conducted an additional survey to 51 respondents to enquire further about their views on marriage and domestic life arrangement, one survey to 50 respondents about their views on buy now, pay later (BNPL) usage and socio-political issues, and one survey to 50 respondents about their views on leisure, vacation, and ticket-war phenomenon. The IDN Media team also conducted a separate survey involving 50 respondents about Gen Z's news consumption. Furthermore, the IDN Media conducted a survey to 300 Gen Z about their views on the state of Indonesian democracy and the upcoming 2024 elections.

The definition of Gen Z in this report is male and female between the age of 11 to 26 years old in the year 2023.

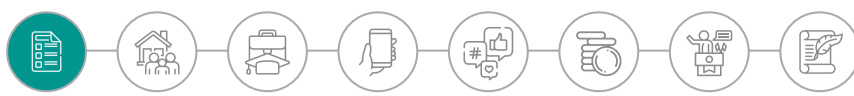
All opinions expressed are from IDN Research Institute and are intended as educational material. Although best efforts are made to ensure that all information is accurate and up to date, occasionally unintended errors and misprints may occur.

## 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 hopes 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.



# Executive Summary

Indonesian Gen Z have emerged as the biggest demographic group in the country, shaping the country's economy, politics, and culture. However, they also remain the most misunderstood. Our surveys and interviews with Indonesian Gen Z and experts show some key trends that help us understand this generation:



**Digital world IS the real world for Gen Z.** If there used to be a dichotomy between the real and digital world, for Gen Z, the difference is paper-thin. As digital native, Gen Z uses the internet for almost everything, from socializing, entertainment, to work and study. Their digital consumption shapes their identity, and sometimes, it can be exhausting for their mental health. However, the pervasiveness of digital activities among Gen Z is not matched with adequate awareness regarding personal data protection and internet etiquette, which can be harmful.



**Stop blaming, start helping: Gen Z needs help in terms of self-development and wellbeing.** As the oldest of them are entering young adulthood amid the post-pandemic job market, Gen Z needs mentorship and support from their senior colleagues. The younger ones also still depend on their family, teachers, or other older figures to guide them through life. Amid the abundant negative stereotypes around Gen Z, the fact remains that they are individuals with their own personal struggles and hopes.



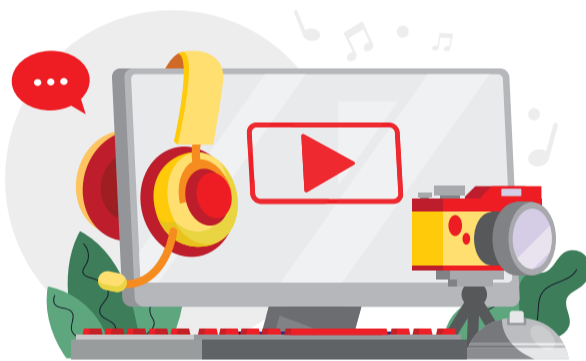
**Inequality, mental health, and social justice are Gen Z's top concerns, followed by impact of technology to the ever scarce job opportunities.** Even though climate change and gender equality are seemingly more popular in social media, we find that Indonesian Gen Z still prioritize social and economic inequality. We believe that this is due to the fact that inequality can exacerbate the impacts of other issues, including climate change.



**Most Indonesian Gen Z are earning less than Rp 2.5 million per month, leaving little to insurance, education and self-development, as well as entertainment.** This financial situation becomes a constraint to other aspects in life: Gen Z have smaller budgets for home, education, or travel.



**The prevalence of online shopping is undoubtedly changing not only Gen Z's behavior but also the way business works.** As price and convenience become priorities for the rather frugal Gen Z shoppers, regular promotion and discounts as well as free delivery services have become the norm. Considering the limited budget, Gen Z shoppers are trying to get the most out of their purchases by spending time on research by watching reviews and comparing prices. We find that ads on social media are still the most influential among Gen Z, but collaborating with influencers, creators, and reviewers and trying out new ways to engage them might create the biggest impact.



**Indonesian Gen Z consume almost everything online, from movies, music, and books to sports and games.** However, as COVID-induced physical restrictions have been lifted, live events and music festivals are attracting massive crowds. As live events become a place to be and be seen (physically and digitally), Gen Z are going the extra mile for a chance to attend, including competing in the so-called ticket wars or buying tickets from *calo* (scalper).



**With all the burden and struggles in the life of Indonesian Gen Z, it is expected that they consider travel as a means to escape their daily life and "heal" themselves.** Domestic destinations remain popular, combined with their preference for shorter getaways lasting 2 to 4 days, Indonesian Gen Z's travel behavior reflect their busy life and meager budget. Travel decisions are primarily influenced by unique experiences, cultural exploration, and natural landscapes.



**As Indonesia is having elections in 2024, social and digital media are key to winning the votes.** Gen Z increasingly rely on social media and consume short-form content instead of reading news articles and in-depth reports, which means that platforms such as TikTok will have immense influence in shaping the elections. Aspiring political leaders must also tune their message to the issues that Gen Z care about, most notably job creation, graft eradication, and welfare.

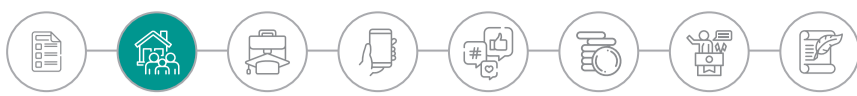




Chapter 1

# Personal Values and Family





# Marriage and Family



Generation Z, a demographic cohort characterized by its youth, encompasses individuals who are currently navigating various life stages. Among them, the youngest are still attending school, while the oldest are embarking on the journey of young adulthood. Interestingly, it's worth noting that, as the popular adage suggests, their frontal lobes, responsible for decision-making and long-term planning, may not have reached full maturity. Nevertheless, despite their youthfulness, Generation Z is compelled to contemplate a myriad of facets in their lives, including education, career prospects, and personal affairs like romance and familial living arrangements.

## More than half of Gen Z still lives with, and financially depends, on their family

In our supplementary survey, which focused on the living conditions of 51 Gen Z and their family arrangements, a significant proportion revealed that their living situation involved extended family members. More specifically, over half of the respondents (27 out of 51) reported residing with their parents, in-laws, and other extended family members.

Gen Z individuals who continue to reside with their families cite primarily financial reasons and the importance of filial support. A notable characteristic of this generation is their relatively limited or nonexistent personal income, underscoring their reliance on parents and extended family members for financial sustenance.

Multigenerational households are not an uncommon sight in Indonesia. Gen Z might not only be living with their parents, but also their grandparents or other extended family members. According to Statistics Indonesia, around three out of ten (30.79%) households consist of the elderly, where half of these elderly individuals (56.73%) are heads of households. About 7.25% of the elderly live alone, 20.85% live with their spouse, and the remaining reside with their nuclear families, three generations, and other household members.



# More than half Gen Z depends on their family financially



|                                       |  |              |
|---------------------------------------|--|--------------|
| <span style="color: teal;">■</span>   | I receive financial support from my family | <b>62.7%</b> |
| <span style="color: orange;">■</span> | I am financially independent               | <b>17.6%</b> |
| <span style="color: blue;">■</span>   | I support my family financially            | <b>19.6%</b> |

Source: IDN Media  
N: 51 responses

The second compelling reason, centered around filial support and familial bonds, underscores the significance of the family structure in the lives of Gen Z individuals as they transition into adulthood. These young adults undoubtedly require their family's presence and support for practical purposes, such as financial stability. However, it extends beyond the practical realm; their families also play a pivotal role in providing guidance and nurturing them as they prepare to confront the challenges and responsibilities of adulthood.

In essence, the presence of family remains essential in shaping the trajectory of Gen Z individuals as they navigate the path towards independence and maturity. Therefore, it is important to note that even though Gen Z are considered as digital native who live on the internet, their perspective and values are also still heavily influenced by their family as a result of this living arrangement.





# Gen Z is less keen on marriage compared to millennials

The question “When will you get married?” has become a widespread meme in Indonesia due to its ubiquity. Virtually every adult has encountered this query, a reflection of the societal perspective that marriage is an essential component of life.

Our primary survey, conducted with 602 respondents residing in ten prominent cities and agglomerations across Indonesia, reveals that a majority of Generation Z members are currently unmarried. A mere 2% of respondents indicated that they have tied the knot, while 36% expressed an intention to do so in the future. The remaining respondents perceive marriage as a distant milestone in their life trajectory.

While the percentage of married individuals is relatively low, this trend aligns with the age of Generation Z, who are, once again, in the early stages of adulthood. A more optimistic interpretation suggests that this data signifies a decline in child marriages within Indonesia. This observation corroborates findings from Statistics Indonesia, indicating a decreasing prevalence of females aged 20-24 who were married before the age of 18, dropping from 10.35% in 2020 to 9.23% in 2021 and further to 8.06% in 2022.

When we conducted a further survey involving 51 respondents from Gen Z, inquiring about their willingness to enter into marriage, we discovered a distinct pattern compared to older generations. Interestingly, the responses leaned more toward “maybe” than an unequivocal “I do.” Within our Gen Z sample, a substantial 73.7% expressed a willingness to consider marriage, while 21.1% leaned towards a more ambivalent “maybe,” and a smaller proportion, 5.3%, unequivocally stated “no” to the idea of marriage.

In contrast, a parallel survey involving 51 millennial respondents showed that 24 individuals had not experienced marriage yet. The majority of these millennials, in contrast to Gen Z, expressed a desire to eventually marry, with only one person firmly stating an intention to remain single.

This intriguing discrepancy can be elucidated by the relative youthfulness of Gen Z, where marriage may not currently occupy a prominent place in their list of priorities. Among the top factors influencing their consideration of marriage, financial stability and mental readiness emerged as key determinants. Notably, the third most frequently cited factor—agreement in values and ways of life—hints at an

emerging trend among Gen Z: they appear to exercise a greater degree of caution when contemplating marriage. This prudence, perhaps influenced by their youth, financial uncertainties, and exposure to a wealth of digital content and news concerning the complexities of married life, suggests that Gen Z approaches the prospect of settling down with a more measured approach, reflecting a shifting attitude towards this life milestone.





# Socio-Political Views

## Social inequality is Gen Z's main concern, with mental health, education, and climate change trailing behind closely

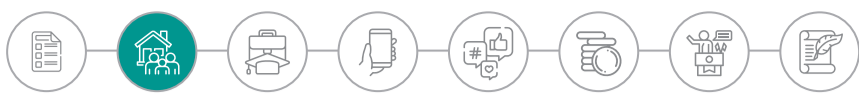
In our inquiry into the concerns of Indonesian Gen Z regarding socio-political issues, the results reveal a range of priorities. The largest portion, more than half at 60%, identified social and economic inequality as a prominent concern. Mental health and well-being closely followed at 51%, while human rights and social justice were noted by 42% of respondents. Access to education garnered concern from 34%, while societal impacts of technological development became concerns for 31% of Gen Z.

Notably, climate change, gender inequality and political changes appeared to be of lesser importance, resonating with only 25%, 12% and 11% of the Gen Z respondents, respectively. This result seems to refute the global understanding of climate as a Gen Z issue – which has become ever more popular due to school strikes led by climate activist Greta Thunberg, who is now aged 20.

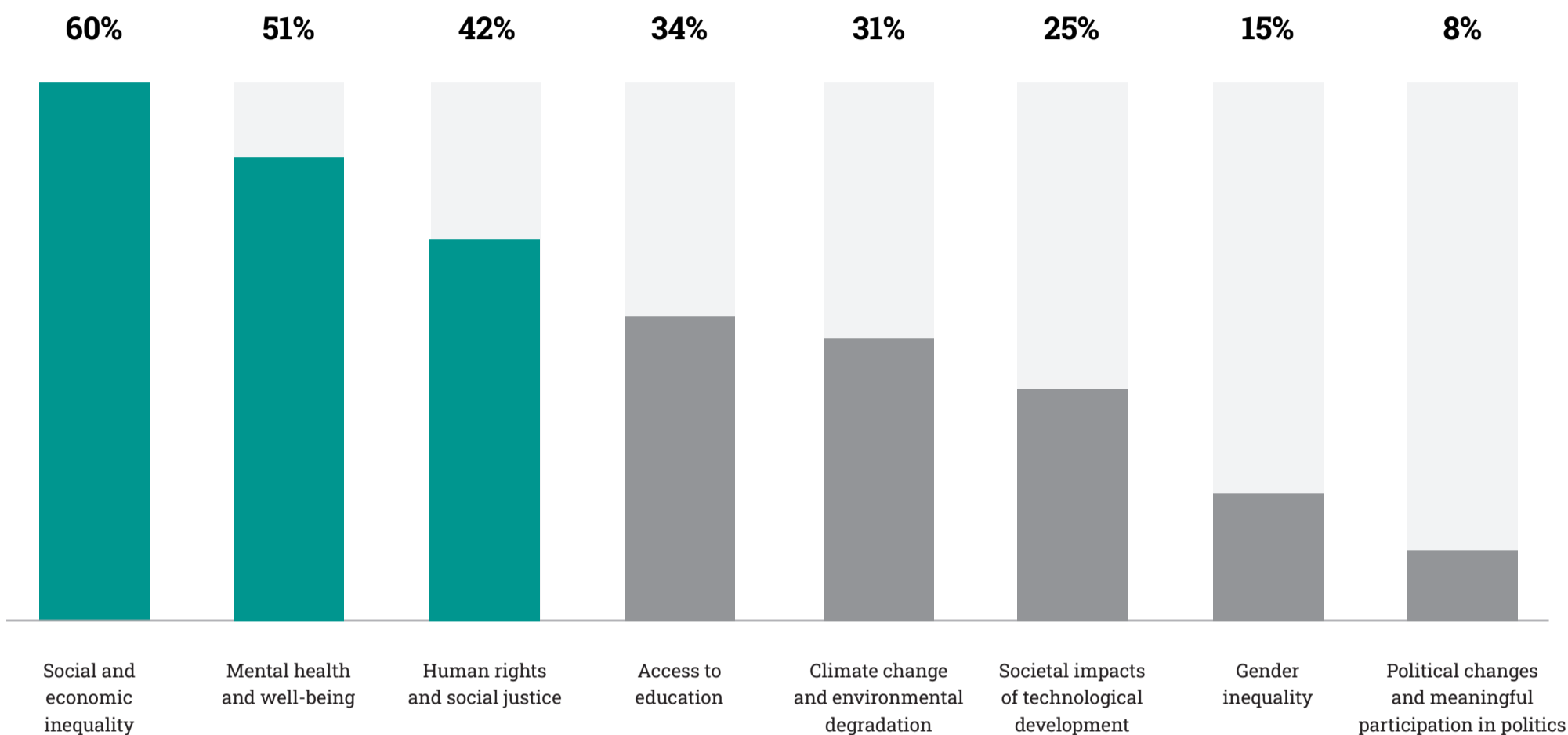
The relatively low level of concern among Generation Z regarding climate change in Indonesia could indeed be attributed to the presence of other pressing issues in a developing country context. For example, many individuals within this generation may prioritize concerns related to the impact of technology on society over climate change. This shift in focus may reflect a growing awareness of automation, which has the potential to displace human workers in certain industries, as well as the challenges posed by the widespread use of social media.

In recent years, issues like automation and social media have emerged as significant concerns for Generation Z. The rise of automation and its implications for employment opportunities, coupled with the polarization and personal stresses associated with extensive social media use, have captured the attention of many within this generation. These pressing issues, which directly impact their daily lives and future prospects, may lead them to prioritize these concerns over climate change, which, while critically important, may be perceived as a more distant and less immediate threat in their immediate context.





## What is Gen Z's biggest concern?



\*Multiple-response questionnaires allow the total result to exceed 100%.

In the realm of gender equality and empowering females, Generation Z could owe a debt of gratitude to the preceding generation. Their activism and academic discussions played a pivotal role in bringing feminism into the mainstream in the country.

Kalis Mardiasih, a writer and gender facilitator, states that in Indonesia, discussions about feminism have become popular and are no longer confined to elites or academia. Now, with the presence of the internet and social media, feminism is everywhere.



**“We are a very religious country, so even talking about feminism has to be through a religious perspective.”**

- Kalis Mardiasih  
Writer and Gender Facilitator

Based on her experience advocating for the draft of a law on sexual violence for several years until it became a law, Kalis has observed a change in Indonesian women's attitudes toward sexual violence. However, she believes that advocating for gender issues in Indonesia requires a different strategy for the public to accept these perspectives. “We are a very religious country, so even talking about feminism has to be through a religious perspective,” she says.

## Toward a more equal society: Gen Z demand a more even playing field

Indonesian Gen Z are deeply concerned about the prevailing issue of social inequality, which encompasses a broad spectrum of disparities including economic, educational, and societal gaps. Indonesian Gen Z has become acutely aware of the escalating levels of inequality, and they recognize the profound importance of addressing these disparities. They understand that doing so not only benefits society at large but also levels the playing field for those within their generation who were born without the advantages of economic or social privilege.

Over the past few years, economic inequality in Indonesia has been on the rise. This inequality is often quantified using the Gini coefficient, which ranges from 0 (indicating perfect equality) to 1 (representing maximum inequality). Data from Statistics Indonesia reveals that as of March 2023, the Gini coefficient stood at 0.388, compared to 0.381 in March 2020.

Atqo Mardiyanto, the General Secretary of Statistics Indonesia, attributes this escalating inequality to an uneven post-pandemic economic recovery. The impact of the pandemic on various segments of the population has led to disparities in economic outcomes, exacerbating the gap between different socioeconomic groups.

Indeed, the issue of social inequality transcends national boundaries and generational divides. The World Social Report 2020, published by the UN Department of Economic and Social Affairs (DESA), highlights that income inequality has surged not only in developing countries but also in many developed nations. This trend extends to middle-income countries such as China, which boasts the world's fastest-growing economy.

The report underscores the gravity of the situation by emphasizing that income disparities and limited opportunities are fueling a distressing cycle of inequality, discontent, and frustration that impacts multiple generations. In his foreword to the report, UN Secretary-General António Guterres acknowledges the profound implications of this inequality on society.

The World Social Report 2020 delves into the far-reaching influence of four overarching global trends, often referred to as megatrends: technological innovation, climate change, urbanization, and international migration. These factors collectively shape the landscape of inequality on a global scale, driving the need for comprehensive and concerted efforts to address these complex challenges and foster a more equitable world for all.

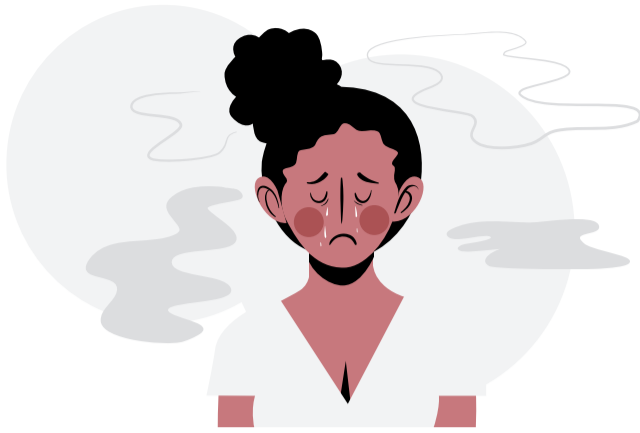
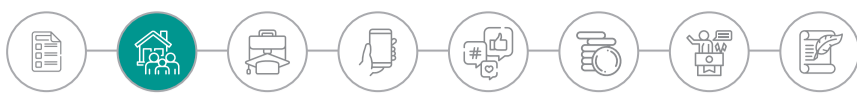
The prominence of social and economic inequality among the concerns of Indonesian Gen Z can be attributed to its far-reaching consequences on a variety of interconnected issues. Inequality acts as a catalyst, exacerbating challenges across different domains.

Firstly, the correlation between inequality and mental health is widely acknowledged. The unequal distribution of resources and opportunities can foster feelings of anxiety and contribute to deteriorating mental well-being among affected individuals.

Furthermore, political inequality can give rise to social injustice, as marginalized groups often face barriers in accessing their rights and opportunities. This amplifies the urgency of addressing inequality to ensure a more just and inclusive society.

Inequality's ripple effects extend to education as well. Unequal access to educational resources hinders the potential of individuals to secure stable livelihoods and adapt to technological advancements and climate change impacts.





## Gen Z are more aware of mental health and its consequences, but professional help is still out of reach for most

The data from our survey underlines the significance of mental health as a prominent concern among Indonesian Gen Z, with 51% of respondents acknowledging it as a pressing issue. The rise in mental health discussions across social media platforms in recent years has contributed to heightened awareness, permeating daily conversations and even influencing language patterns with therapy-related terminology.

**The I-NAMHS (Indonesia National Adolescent Mental Health Survey) in 2022 found that approximately 1 in 20 or 5.5% of adolescents aged 10-17 years were diagnosed with mental disorders in the last 12 months, commonly referred to as individuals with mental health disorders (ODGJ). Meanwhile, about one-third, or 34.9%, had at least one mental health issue, categorizing them as individuals with mental health problems.**

In addition to highlighting the prevalence of mental health issues among adolescents in Indonesia, the survey also revealed that only 2.6% of adolescents with these mental health issues accessed assistance and counseling services.

However, despite the increased visibility, substantial challenges remain in addressing mental health in Indonesia. Access to professional mental health services remains limited, and there is still a lack of general awareness about the importance of mental well-being.

Negative stigma surrounding mental health persists, resulting in individuals with mental health disorders facing judgment rather than support. Compounding these issues, social problems like child marriage and poverty disproportionately impact those in lower socio-economic strata, exacerbating mental health challenges.

The 2018 Basic Health Research (Riskesdas) by the Health Ministry provided valuable insights into the mental health landscape in Indonesia. The prevalence of schizophrenia and psychotic disorders within households was reported at 7 people per million. Alarmingly, 14% of these households admitted to practicing shackling as a form of restraint for individuals with psychosocial disabilities, particularly in rural areas.

The study also highlighted the prevalence of diagnosed depression, affecting 6.1% of Indonesian individuals aged 15 and above. Only a small fraction, 9%, of those diagnosed with depression received routine medication. Emotional disorder prevalence reached 9.8% or around 20 million people, marking a significant increase from 6% in 2013.

This data underscores the urgent need for enhanced mental health awareness, access to professional care, and efforts to combat the stigma surrounding mental health issues in Indonesia. Collectively addressing these challenges can pave the way for a more supportive environment for mental well-being among Indonesian

Gen Z and the broader population, starting with increasing access for all people.

Even though mental health care is covered under the national health insurance (BPJS), the number of mental health professionals is still minuscule. Susy K. Sebayang, a Public Health researcher from Airlangga University, and her team, mentioned in an article on *The Conversation* (2018) that Indonesia, with a population of 260 million, only has 773 psychiatrists and 451 clinical psychologists. In 2008, the Indonesian government recognized psychologists as healthcare professionals. However, the placement of psychologists in healthcare centers (puskesmas) across Indonesia remains extremely limited. So far, only Yogyakarta has succeeded in placing a psychologist in all 18 of its healthcare centers since 2010. No other cities or districts have implemented similar policies.





## Gen Z are breaking stigma around mental health and finding support on digital platform

Given the prevailing lack of access to mental health care in Indonesia, it's understandable why discussions surrounding mental health are somewhat limited in the digital sphere. Many individuals within Generation Z resort to self-diagnosis, and while this may not be ideal, it's important to refrain from vilifying them for seeking support and information online. The reality is that professional mental health care remains largely out of reach for a significant portion of this generation.

To further promote discussions about mental health in Indonesia, POPBELA.com launched "Pejuang Pulih" in 2021, aimed at increasing awareness of mental health issues. This platform strives to educate the public about mental health problems and the importance of seeking help.

Judithya Pitana, Editor-in-Chief of POPBELA.com, rightly acknowledges that Generation Z has played a pivotal role in destigmatizing mental health through their digital activism. "They have courageously shared their personal struggles, even those that might be considered taboo or shameful by older generations, on social media platforms such as Instagram, Twitter, and TikTok," said Judith. One notable initiative in this regard is the "Pejuang Pulih" platform, where they openly discuss their experiences with depression, anxiety, and other mental health challenges.

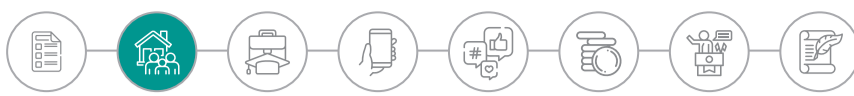
Furthermore, Gen Z extends their support to those who are also grappling with mental health issues. They offer moral and emotional support to friends, family members, and others who are facing similar challenges. Platforms like "Pejuang Pulih" serve as a catalyst for encouraging open conversations about mental health, fostering a community that promotes understanding and empathy in addressing these critical issues.

**"They have courageously shared their personal struggles, even those that might be considered taboo or shameful by older generations, on social media platforms such as Instagram, Twitter, and TikTok."**



- **Judith Pitana**  
Editor-In-Chief of POPBELA.com





## 'Social Justice Warrior' is discounting the urgency of upholding human rights and social justice in Indonesia

It's notable that despite the derogatory connotation the term "social justice warrior" has gained on social media, human rights and social justice remain significant concerns for 42% of the respondents in our survey. This observation aligns with the importance of social justice within Indonesia's state ideology, Pancasila.

Pancasila's emphasis on social justice as a fundamental principle underscores its significance within the national context. While the term may have taken on different meanings and connotations online, the core values of human rights and social justice remain deeply rooted in the national ethos. The recognition of these values by a considerable proportion of Indonesian Gen Z reflects their engagement with and commitment to upholding these principles, both as a reflection of national ideology and as essential components of a just and equitable society.

The fact that the majority of Gen Z grew up in the post-Reformasi era can indeed offer insight into their perspectives on human rights and social justice. This period marked a significant turning point in Indonesian history, as political activism and movements gained momentum following the downfall of the New Order government. As a result, many members of Gen Z have been exposed to and influenced by a climate of increased political awareness and advocacy for human rights and social justice. This experience has likely played a pivotal role in shaping their views and commitment to these important societal issues.

We recognize that human rights and social justice can be subjective concepts, particularly within the Indonesian context. The interpretation of these ideals varies widely among individuals. For

instance, in our survey, 42% of Indonesian Gen Z acknowledge the importance of human rights. However, in the same survey, a significant 89% of Gen Z express support for the exclusion of the LGBT community. This unfavorable view on the LGBT issue can potentially foster discrimination or even violence against certain groups based solely on their gender and sexual orientation, which constitutes a breach of human rights.

This incongruity highlights the complexities within society's perceptions and attitudes toward these issues. It underscores the need for ongoing dialogues and efforts to promote understanding, tolerance, and respect for the rights of all individuals, regardless of their backgrounds or identities. A balanced approach that acknowledges diverse viewpoints while upholding the fundamental principles of human rights and social justice is essential to fostering a fair and inclusive society.

# 42%

**Indonesian Gen Z acknowledge the importance of human rights**

## Directly impacted by climate change and environmental degradation, Indonesian Gen Z are changing lifestyle and demanding systemic changes from government and corporations

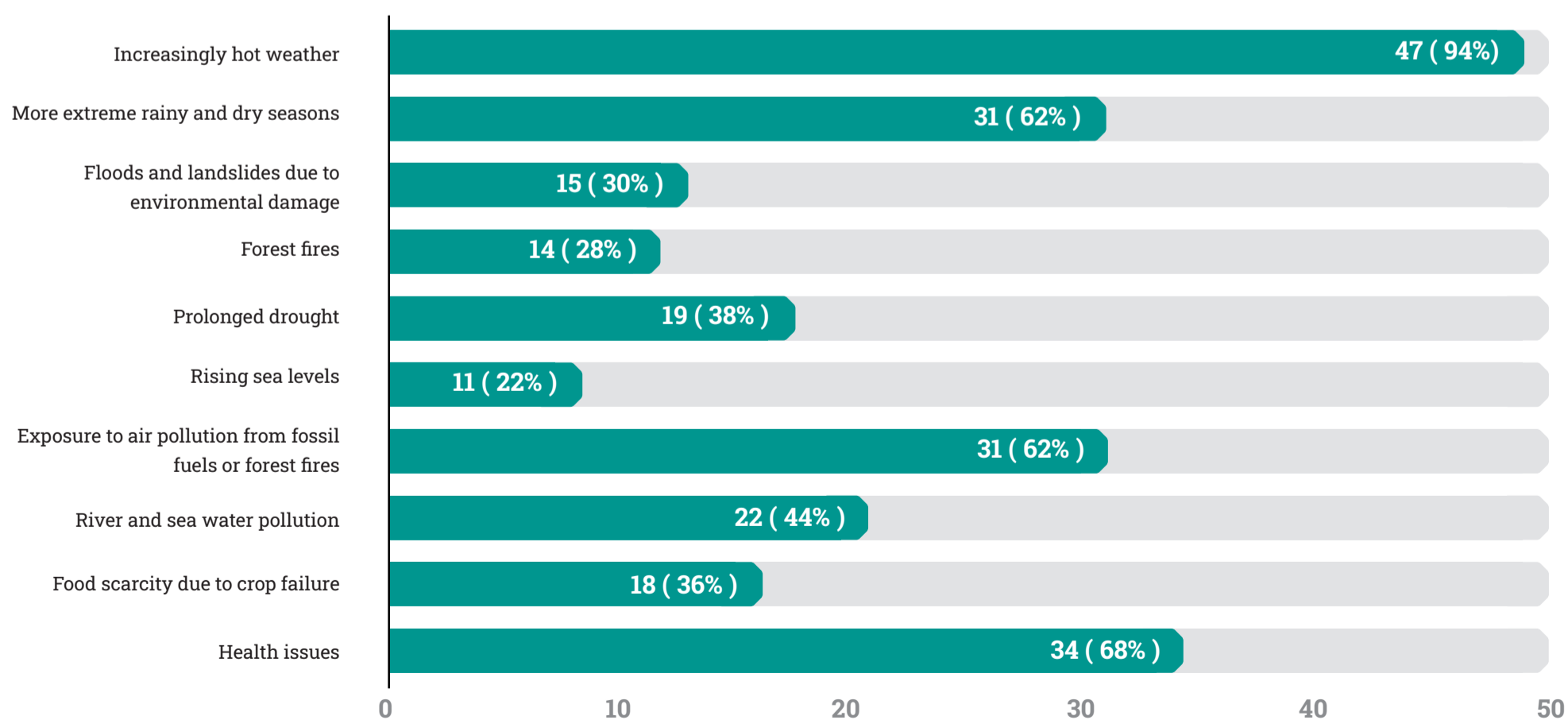
In an additional survey with 50 respondents, an overwhelming majority (88%) expressed climate change should be taken as a serious concern. Furthermore, 94% agreed that both government and corporations must implement structural or systemic changes to mitigate climate change, as opposed to 6% who believed individual efforts alone would suffice. This indicates that Indonesian Gen Z view climate change as a collective challenge requiring broader action beyond individual responsibility.

However, these Gen Z are actively contributing to the fight against climate change. A significant portion stated that their understanding of climate change has influenced their lifestyles. This influence ranges from reducing single-use plastic consumption to lowering their carbon footprint through the use of public transportation and energy-

saving practices. Additionally, 82% of respondents expressed willingness to pay extra for eco-friendly or sustainable products.

These perspectives on climate change among Indonesian Gen Z may be rooted in personal experiences. All respondents reported being impacted by climate change and environmental degradation in some way. For example, in the Jakarta metropolitan area, air pollution has emerged as a significant health hazard for millions of residents. In other regions, haze resulting from forest fires has disrupted daily activities and posed health risks to the population. In Indonesia, air pollution ranks as the fifth leading cause of death after hypertension, high blood pressure, diabetes, and smoking. Approximately 123,000 deaths per year in Indonesia are attributed to air pollution.

### Have you experienced the impacts of climate change and environmental degradation in the past year?



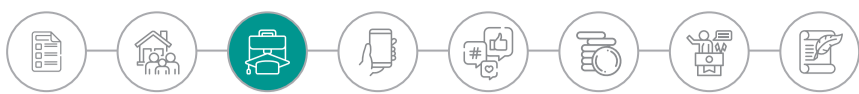
\*Multiple-response questionnaires allow the total result to exceed 100%.



## Chapter 2

# Education and Career





# Quality education is getting more and more out of reach for most Indonesians

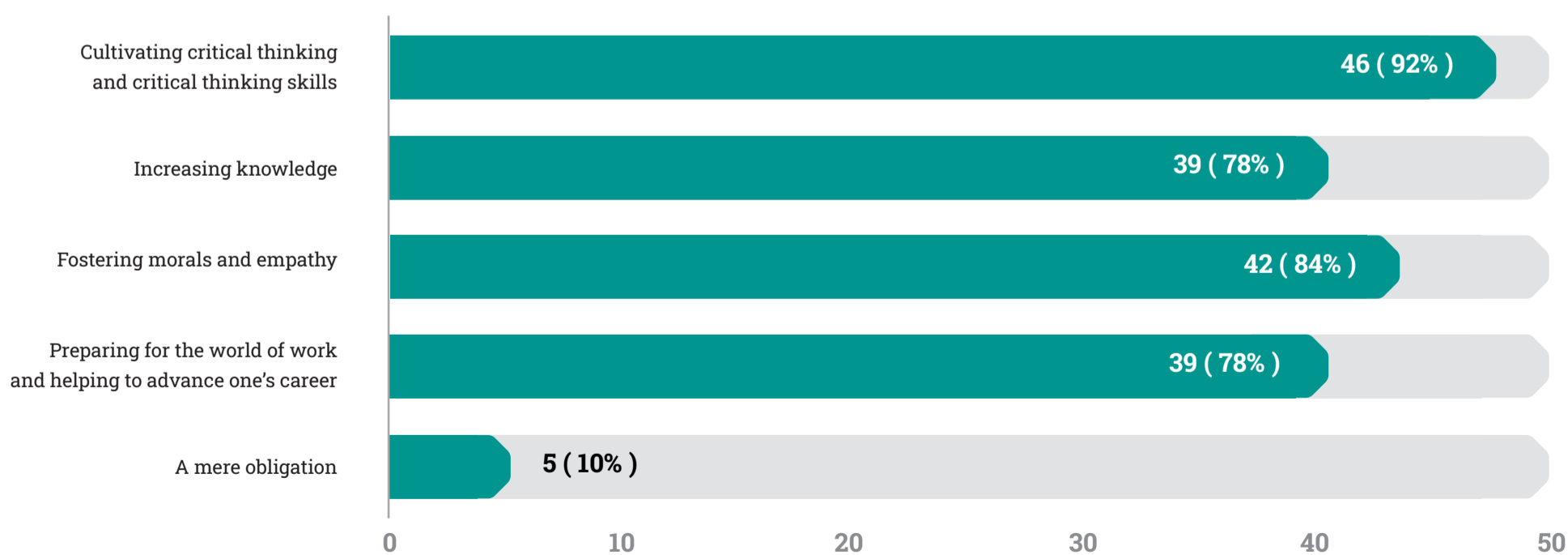
Access to education garnered concern from 34% out of 602 Gen Z in our main survey. In an additional survey involving 50 Gen Z, it was found that 82% of respondents are contemplating furthering their own education. 36% expressed concerns about the future cost of their children's education, which is significant considering that many of them have not married yet.

The issue of education costs has become a prominent concern among Indonesian Gen Z. Only 30% believe that everyone can access quality education, while 64% believe that scholarships or additional financial support are necessary, and 6% believe that only affluent individuals can afford quality education.

Despite government-provided scholarships and free basic education, there are still segments of the population that do not receive financial support, and parents continue to incur additional expenses.



## What is the essence of education for you?



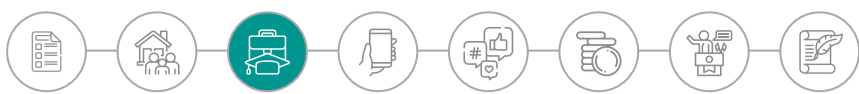
\*Multiple-response questionnaires allow the total result to exceed 100%.

Source: IDN Media  
N: 50 responses

Saving for education holds a paramount position in the priorities of Gen Z, who are acutely aware of the significance of pursuing higher education. They recognize that obtaining a college degree or pursuing further education is instrumental in enhancing their career prospects and future earning potential. This awareness is underscored by their observations of the difficulties faced by previous generations in navigating the post-pandemic job market and adapting to the changing landscape of work, heavily influenced by technological advancements.

In response to these challenges, Gen Z understands the imperative of acquiring additional skills to remain relevant in a rapidly evolving job market. Their commitment to saving for education is a testament to their determination to equip themselves with the necessary qualifications and competencies to thrive in a world where continuous learning and adaptability are key to success.





# Career Preferences

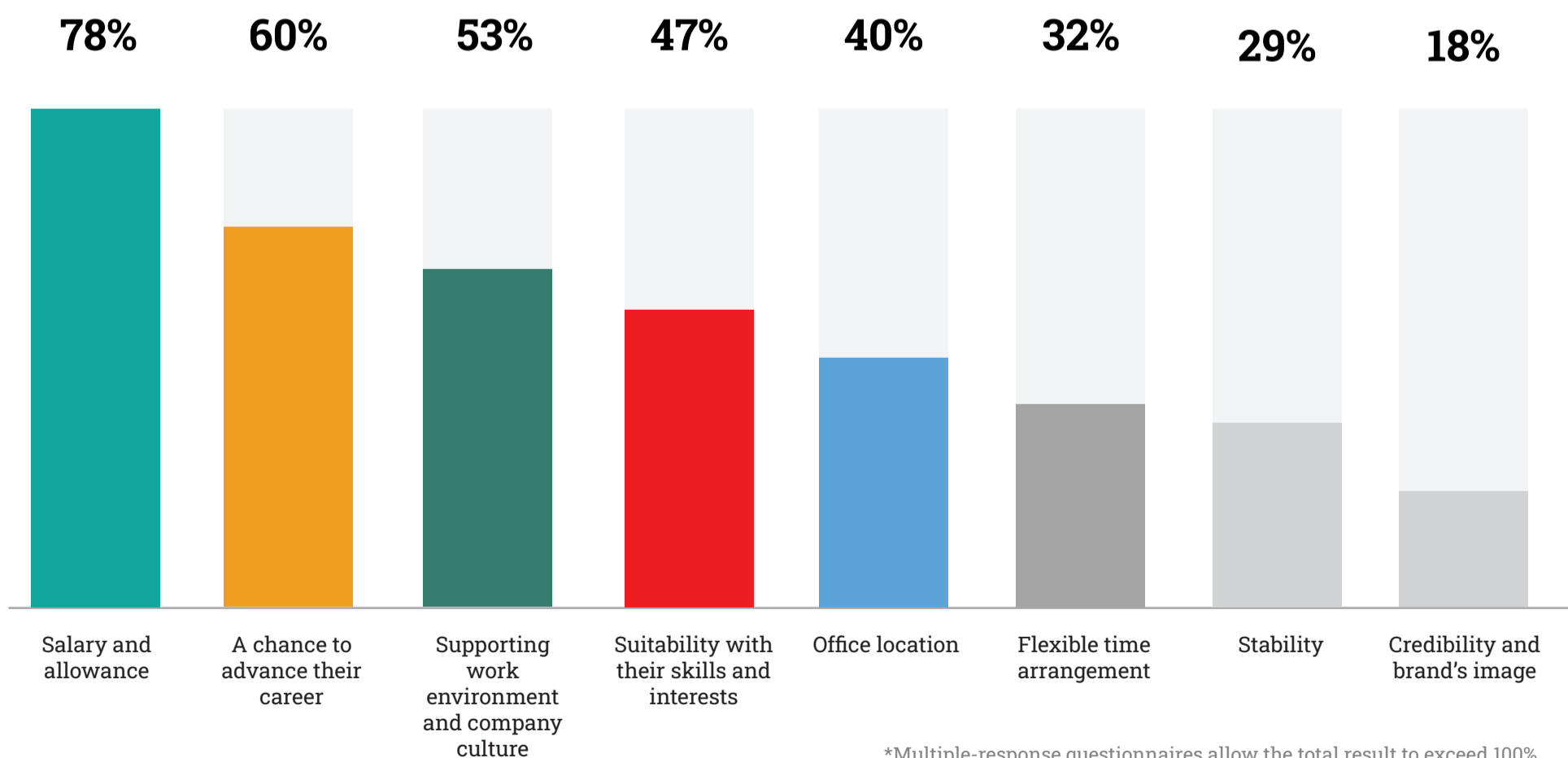
## Lazy, rude, and irresponsible? Growth opportunity and supporting environment are essential to attract and retain Gen Z in the workplace

It's a common trend on social media platforms for millennials and older generations to criticize their younger Generation Z colleagues. Stereotypes abound, ranging from portraying Gen Z as lazy workers and rude communicators to suggesting that they use mental health as an excuse to avoid fulfilling their responsibilities.

This unfortunate contrast between stereotypes and the actual desires of Gen Z in the workplace is striking. Beyond their understandable expectations for salary and allowances, Gen Z also places significant importance on having a supportive work environment, a positive company culture, and opportunities for career advancement. These aspects are crucial for their job satisfaction and professional growth.



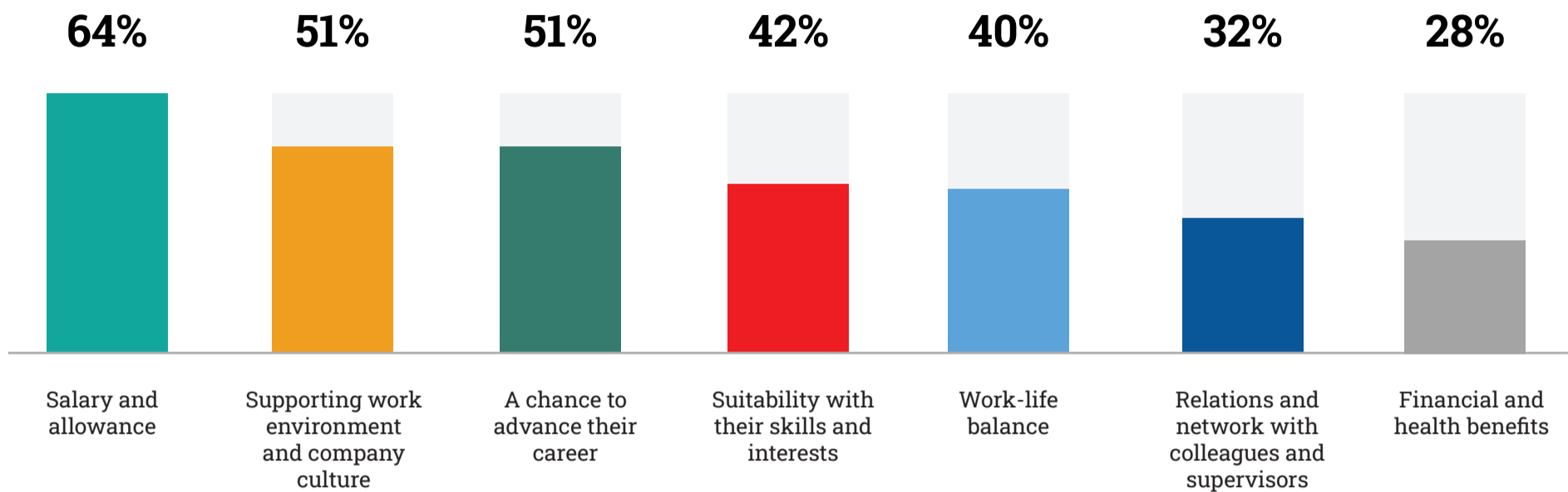
### What do Gen Z look for in a workplace?



\*Multiple-response questionnaires allow the total result to exceed 100%.



## Should I stay or should I go? Career growth and work environment are key factors after salary



\*Multiple-response questionnaires allow the total result to exceed 100%.

The emphasis on career growth and development aligns with the growing awareness of the importance of self-improvement and mental health. Gen Z recognizes that a fulfilling job involves opportunities for skill enhancement, personal growth, and advancement within the organization. This shift in priorities reflects a holistic approach to their careers, where factors beyond monetary rewards play a significant role in their decision-making process.

The stark contrast between the stereotypes and complaints about Gen Z and what they actually value in the workplace may indeed be attributed to ineffective communication within the workplace. It's possible that, given their entry into the workforce during the pandemic, Gen Z might not have had the opportunity to

fully grasp the expectations of their senior colleagues and the established norms and office culture. Effective communication and onboarding processes can bridge this gap, helping to align their expectations with workplace realities and fostering a more positive and productive work environment for all generations.

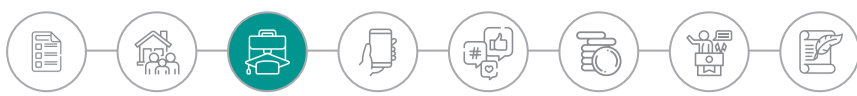
Hendra Soeprajitno, Editor-In-Chief of FORTUNE Indonesia, noted that the work from home or work from anywhere arrangement during the pandemic might have exacerbated the challenges of work communication. He emphasized on the irreplaceable nature of offline communication in Indonesian workplaces, which could not be replaced by the online channels.



**“Don’t let hybrid working reduce human interaction. Because, in any case, offline communication—although it requires more time, effort, and cost—is still more effective than online.”**

- **Hendra Soeprajitno**  
Editor-In-Chief of FORTUNE Indonesia

Personal and effective communication between Gen Z and their colleagues can create opportunities for mentorship and growth. These opportunities often necessitate deeper bonds and connections compared to mere chatting or emailing, let alone complaining about Gen Z on social media platforms.

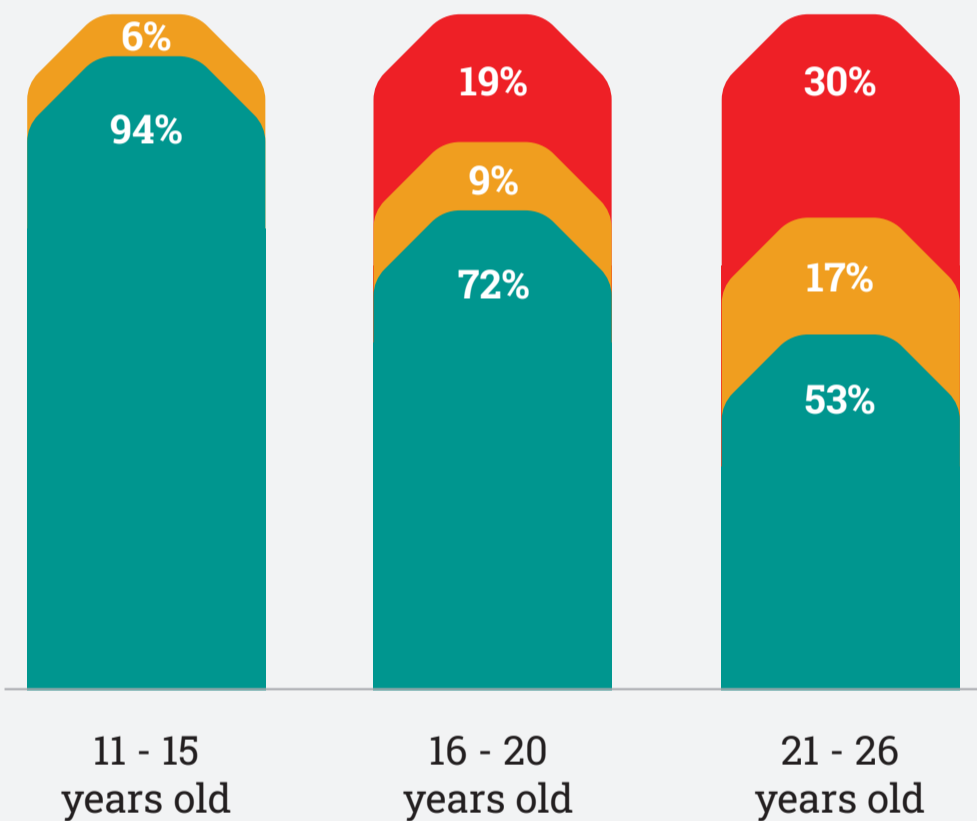


# Side-hustling becomes ubiquitous for older Gen Z as financial pressure increases

As Gen Z advances into older age brackets, there is a discernible trend of heightened involvement in supplementary employment or alternative income sources. This inclination can be attributed to the progression of Gen Z's careers and their accumulation of experience, prompting them to explore diverse avenues for income generation and pursue various interests. Side jobs serve as avenues for augmenting financial stability, indulging in personal passions, or acquiring fresh skills.

With the passage of time, older Gen Z, who have amassed more work experience and cultivated a wider professional network, may discover it more feasible to secure side jobs or freelance engagements. Their increased self-assurance in their competencies and a better grasp of their market value empower them to undertake additional work responsibilities confidently. This evolution in their approach to employment exemplifies their strategic maneuvering to create diversified income streams and capitalize on their skill sets as they advance in their careers.

## Do you have a side gig?



- No, I do not have a side gig nor extra income
- Yes, I have my own business
- Yes, I have a freelance work

In the context of Indonesian Gen Z, side gigs predominantly serve as supplementary sources of income, as evidenced by a comparative analysis of side job earnings in relation to their primary employment. Among respondents, 14% stated that their side gig contributes an additional 25-50% to their primary income. For 26%, the contribution is below 25%. Conversely, a mere 7% reported that their side gig surpasses 50% of their primary income, with an even smaller 1% indicating that their side gig yields more income than their main job. This distribution underscores the supportive nature of side gigs, generally intended to complement the main source of income, rather than serving as the primary income generator.

Taking a more cautious perspective, it's possible to argue that Indonesian Gen Z are confronted with the reality that a single income source may not suffice to address the consistently rising cost of living. This situation becomes particularly pronounced for those who find themselves navigating the responsibilities of supporting both their parents and their own children concurrently. The financial obligations associated with such a sandwich generation scenario underscore the necessity for additional income streams, given the increased financial demands and potential strains on resources. In such circumstances, diversifying income sources through side gigs or supplemental ventures becomes a pragmatic strategy for managing the multifaceted financial commitments that arise within this complex family dynamic.



## Creator economy as an income funnel for Gen Z

The creator economy has grown significantly in recent years, enabled by the widespread availability of high-speed internet, the rise of social media, and platforms that allow creators to reach global audiences. It has opened up new career opportunities and income sources for individuals across various creative and niche domains.

It's worth noting that the emergence of the creator economy in Indonesia highlights that the youth are not merely spectators in the digital realm; they are actively engaging. Several millennials and Gen Z individuals are harnessing digital tools and platforms to showcase their creations and generate income via diverse channels, including advertising proceeds, sponsored content, merchandise sales, affiliate marketing, and fan contributions.

IDN Media has tapped into the creator economy through Indonesia Creators Economy (ICE), IDN App (which include IDN Live, Quiz, and IDN Community Writers), and digital talent management company MORF.

While some argue that the creator economy may divert advertising funds from traditional media, IDN Media, through ICE, aims to streamline collaboration between brands and content creators.



- Hana Novitriani  
Vice President of ICE

**“We address the pain points in the collaboration between brands and content creators. For instance, selecting the right creators based on their communication style and track records, dealing with their talent management or agency, executing the campaign plan, and the lack of standardized pricing among content creators, which can make negotiations lengthy and challenging.”**

Hana contends that media and content creators are not competitors but rather collaborators. She stated, “There is no one-size-fits-all solution. One media outlet cannot function in isolation. Diversifying channels is essential for brands because they operate differently.”

### Best practices for brand and creator partnerships according to Hana Novitriani, Vice President of ICE:



**Sense of ownership is key.**  
We have to be a part of the campaign.



**A clear brief from the brand,** so we know the expectations and share the same understanding on the campaign.



**Mediate and bridge the interests** between the brand and content creators



While not many Indonesian content creators can directly monetize their content through paywalls or premium content systems, a new model is emerging. Creators can earn money from fan support during live streams, like IDN Live, or through live streaming monetization platforms such as Saweria. IDN Times also opens up opportunities for aspiring writers to earn extra income as Community Writers at IDN Times Community. The income range for active writers contributing to IDN Times Community varies, starting from around Rp250,000 to Rp5,000,000 per month as of November 2023.

Ernia Karina, Coordinator Editor at IDN Times, works with thousands of Community Writers at IDN Times Community who contribute writings for the media. Ernia highlights the Community Writers at IDN Times Community as evidence of the creative potential among Indonesian youth when provided with a platform to showcase their work. Their continued active participation in writing, amidst various other forms of content creation, challenges the prevailing notion that literacy rates among millennials and Gen Z in Indonesia are low. "Until now, the assumption that millennials and Gen Z are a disengaged generation with low reading interest has been shattered," Ernia commented.

"Based on the data and facts we have gathered here, we can conclude that Indonesian millennials and Gen Z exhibit a high level of enthusiasm and a spirit of exploration. They are a generation that doesn't want to merely be spectators or readers; instead, they want to actively engage and become creators, one of which is through writing," she said.

**"Based on the data and facts I've gathered here, I can conclude that Indonesian millennials and Gen Z exhibit a high level of enthusiasm and a spirit of exploration. They are a generation that doesn't want to merely be spectators or readers; instead, they want to actively engage and become creators, one of which is through writing."**



- **Ernia Karina**  
Coordinator Editor at IDN Times



# Inspiring stories from Community Writers at IDN Times Community:



**Fitriani Sudradjat**, a community writer from Garut, West Java. She used the savings from her writing in the IDN Times Community to open a photo printing business in her village because there were no photo printing services available there.



**Siti Akromah**, a community writer from Banten. She used the earnings from writing in the IDN Times Community for her daily allowance while she was still in high school, eliminating the need to ask her parents for money. Siti Akromah also saved the money she earned from writing to cover her graduation expenses.



**Yohana Belinda**, one of the community writers from Malang who was studying in Australia at the time. She donated all the money she earned from writing in the IDN Times Community to a nursing home because her intention for writing in IDN Times was solely to learn and create.



Chapter 3

# Media Consumption and Online Behavior





# Social Media Behavior

## URL or IRL? Gen Z lives in a world where online existence matters the most

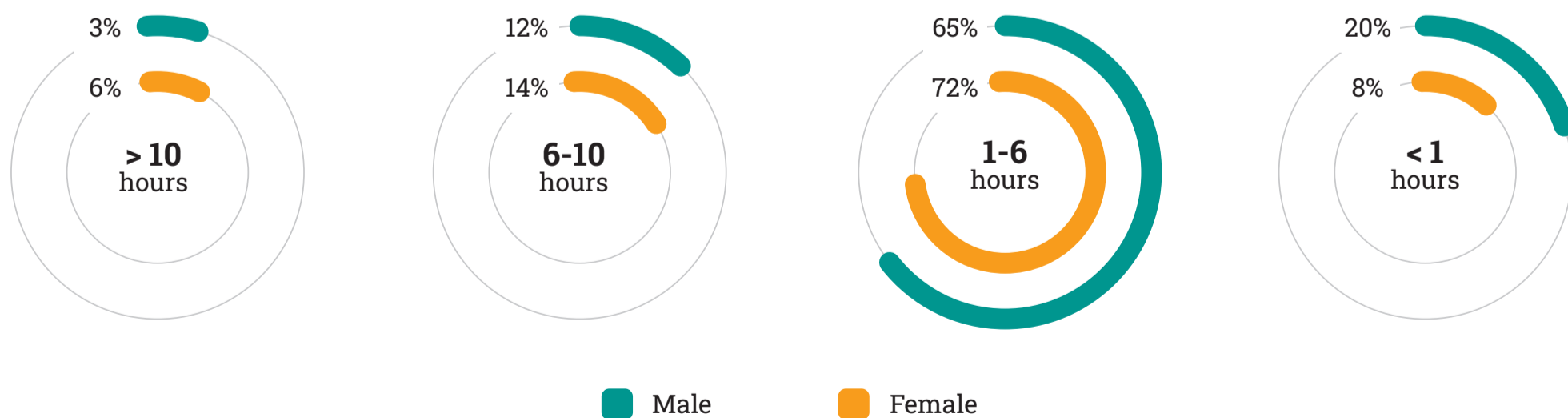
Gen Z's online presence is significantly more pronounced than that of older generations, reflecting their status as digital natives. They inhabit a world where the boundaries between offline and online existence blur, as they seamlessly study, socialize, and work through the internet. For many in Gen Z, their digital footprint is more than a convenience; it's a core aspect of their identity. They forge connections, seek validation, and discover their place in the world through their online interactions, forging communities that transcend geographical limitations. In this hyperconnected landscape, the internet isn't just a tool; it's an integral part of their daily lives, serving as the canvas upon which they paint their experiences, aspirations, and evolving sense of self.

The majority of 602 Gen Z in our survey say that they spend around 1–6 hours on social media daily. In our survey, 13% of the respondents reported using social media for less than one hour daily. The most avid users admitted that they used social media for 6–10 hours (14%) and even more than 10 hours (5%) – leading to the “chronically online” moniker.

East Ventures – Digital Competitiveness Index, an annual report which measures the digital competitiveness of Indonesian provinces, found in its 2023 edition that digital adoption has been more equal in all provinces (except the new provinces) that it has mapped for four years in a row. The report also revealed that digital adoption in Indonesia continued to show a positive trend.



### How chronically online are Indonesian Gen Z?

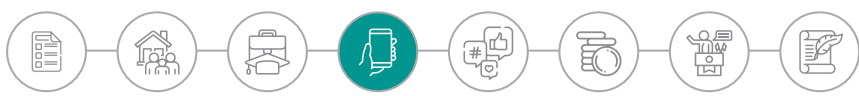




**22%** of the respondents primarily utilize social media for accessing news and acquiring new information. Meanwhile, **15%** of them utilize it to maintain their friendships and connections. A noteworthy **5%** of respondents solely use social media to follow influencers. However, the majority, accounting for over half of the respondents, engage in all these activities on social media.



Notably, social media has also assumed the role of a search engine for younger users, reflecting its multifaceted utility in their lives. The insights align with Google's Knowledge & Information Senior Vice President Prabhakar Raghavan's observations. He pointed out that among Gen Z users aged 18 to 24 in the US, 40% use platforms like TikTok and Instagram to discover lunch spots, bypassing traditional search engines like Google or Google Maps. This phenomenon underscores the profound influence of social media in shaping the information-seeking behaviors of younger generations.



# The Gen Z's exodus to TikTok: A retreat from Instagram's perfectionism

Instagram continues to reign supreme as the go-to social platform for Indonesian Gen Z, with both males (53%) and females (52%) frequently using it. It remains their daily digital playground, offering a versatile blend of content types, including photos, videos, and articles, which resonates with 60% of respondents who appreciate this all-encompassing approach. However, TikTok's allure is on the rise, capturing the attention of 36% of female respondents and 29% of males. TikTok's success lies in its succinct and information-packed short-form video format, which cuts straight to the chase, making it particularly appealing to the visually-driven and content-hungry Generation Z audience.

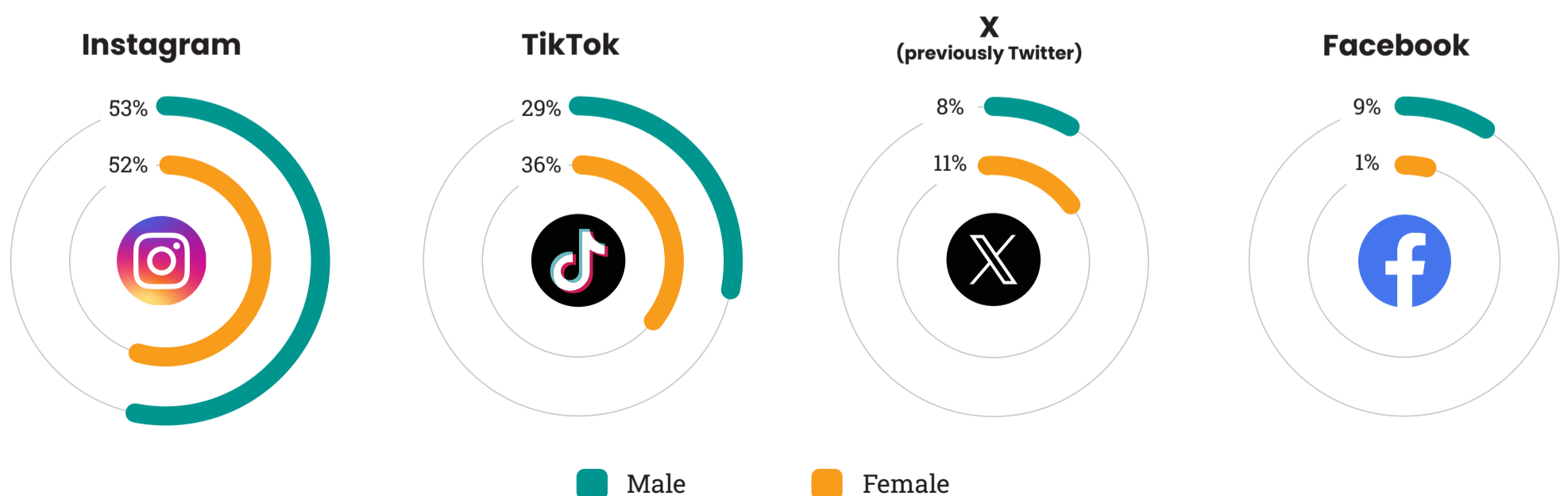
TikTok is also a veritable treasure trove of aesthetic trends and -core movements, where creativity knows no bounds. From the ever-popular Cottagecore, characterized by idyllic rural aesthetics, to the dreamy and ethereal aesthetics of Fairycore, TikTok is a canvas where Gen Z artfully weaves together a tapestry of visual themes and styles. These trends serve as outlets for self-expression, allowing users to explore and celebrate their unique tastes while fostering a vibrant online community that's constantly pushing the boundaries of digital aesthetics.

Gen Z's fascination with aesthetics is a defining characteristic of their digital presence and reflects their ongoing journey to craft their self-image and identity. Through the curation of carefully designed social media profiles, Gen Z seeks to convey not just their interests and passions but also their sense of style and personal

brand. The meticulous selection of filters, themes, and visuals allows them to shape the way they are perceived by their online peers. In a world inundated with visual content, this focus on aesthetics can be seen as a means of self-expression and empowerment, as they navigate the complex landscape of social media consumption. It's a testament to their creativity and their desire to stand out in a digital sphere that often emphasizes appearance and presentation, ultimately contributing to the ever-evolving tapestry of their self-identity.

Gen Z's migration towards TikTok can also be seen as a reaction to the pressure associated with maintaining a meticulously curated and seemingly flawless Instagram feed, which has become somewhat of a trademark on the platform. The constant need to present an impeccable and aesthetically pleasing profile has given rise to the use of "finsta" or fake Instagram accounts among this generation. On these "finstas," Gen Z can let their guard down, freely sharing "dumps" of blurry, low-resolution, and non-aesthetic pictures that wouldn't typically find a place on their main account. TikTok, on the other hand, offers a respite from the demands of Instagram. It allows users to consume content without the obligation of meticulously curating their own profiles or maintaining connections with real-world friends and family. For many in Gen Z, TikTok serves as a sanctuary where they can escape the pressures of Instagram and simply be themselves, free from the constraints of picture-perfect aesthetics.

## Watch out, Instagram: Gen Z is migrating to TikTok for content and convenience

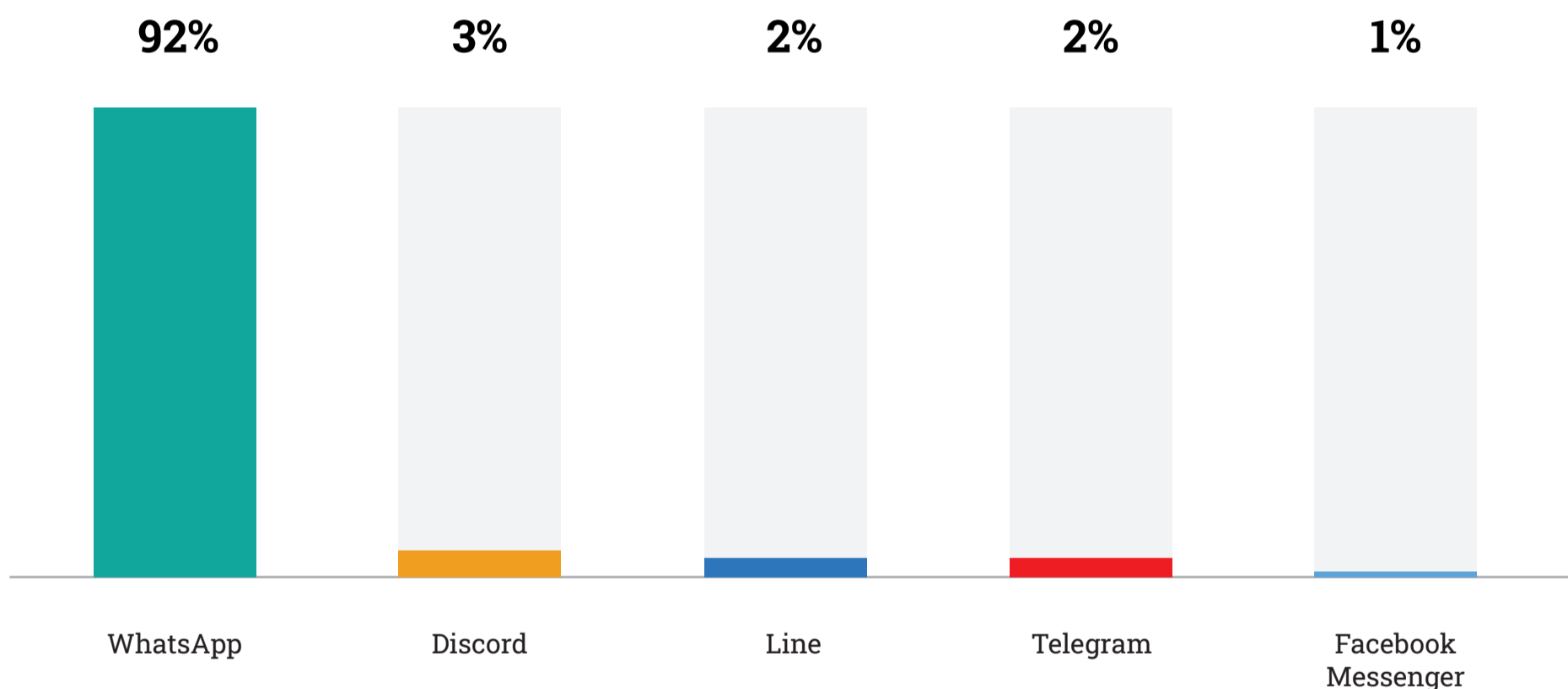


A notable 10% of our respondents indicate that they are still using Twitter, which has recently been re-branded as X under its new owner, Elon Musk. The platform faced strong competition with the launch of Threads, a similar text-based platform that is part of Meta, the company behind Facebook and Instagram. Despite an impressive initial milestone of 150 million downloads in under two weeks, Threads is encountering challenges in retaining active users. Indonesian Gen Z, akin to their global counterparts, appear to be experiencing a love-hate relationship with Twitter (ahem, X) following Musk’s takeover, resulting in ongoing engagement with the platform.

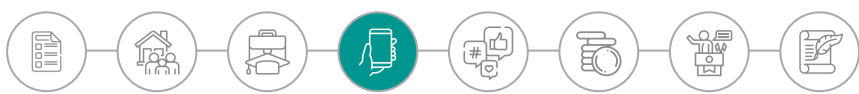
A significant 4% of our respondents reveal that they continue to use Facebook, with a higher proportion of male users compared to female users. Indonesian Gen Z appear to be retaining their presence on the platform due to its community-based features, such

as Groups and Fan Pages, which foster engagement and connections within their respective interests and communities. Despite the rise of newer platforms, Facebook’s community-centric approach continues to resonate with this demographic, contributing to its sustained popularity among Indonesian Gen Z.

WhatsApp maintains its dominant position as the most popular messenger app among Indonesian Gen Z, with an impressive 92% of respondents confirming their usage. In comparison, only a small fraction, 3%, uses Discord, 2% Line, 2% Telegram, and 1% Facebook Messenger. WhatsApp’s popularity extends beyond personal communication, with many Gen Z also leveraging it for professional and commercial activities.



Even official agencies in Indonesia, like the Ministry of Health, have embraced WhatsApp, using it to streamline bureaucracy and offer essential services such as providing a quick response chatbot to assist citizens with their COVID vaccination certificates. This widespread adoption of WhatsApp showcases its versatility and effectiveness as a multi-purpose communication platform for the Indonesian population.



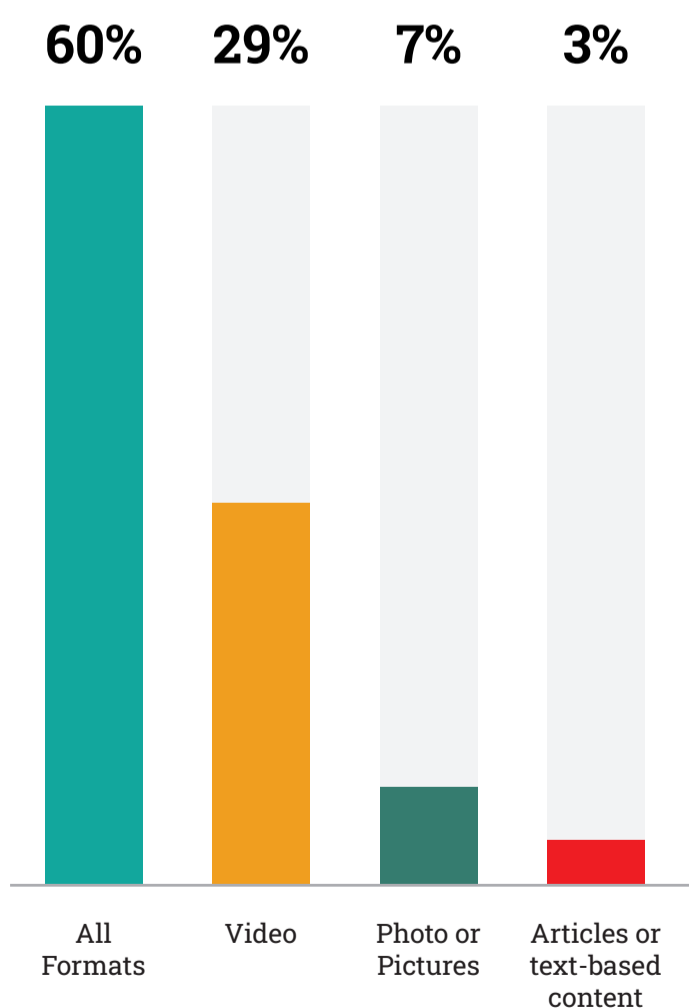
# Rise and dominance of short-form video content

The rise of YouTube in the early 2000s signaled the onset of the short-form video market, which gained momentum around 2010, fueled by the success of platforms like Instagram and TikTok. These brief videos, typically lasting from a few seconds to a minute, gained traction due to their ease of sharing and quick consumption, particularly on mobile devices.

29% of Gen Z claim to prefer watching video content whereas only 7% prefer visual based articles and 3% prefer reading articles. The rest consumes a combination of the three.



## Indonesian Gen Z consume all content format, with video far exceeding photo and text-based content



Short-form video content has become a dominant force across various online platforms, captivating audiences with its concise and compelling nature. Typically clocking in at under a minute, this style of content has gained widespread popularity in response to the modern viewer's demand for immediate satisfaction and meaningful engagement. Short-form videos effectively address the challenge of short attention spans in today's fast-paced world, swiftly grabbing and retaining the viewer's focus. With their brevity and mobile-friendly appeal, they perfectly align with the on-the-go lifestyle of individuals seeking easily digestible content.

Furthermore, short-form videos are meticulously designed to be intriguing and enthralling, leveraging visually appealing and engaging techniques. This trend has been notably popularized by platforms such as TikTok and Instagram. In addition to their captivating qualities, short-form videos offer a cost-effective solution for content creation, presenting a more budget-friendly option compared to producing long-form videos. This affordability renders short-form videos particularly appealing to startups and small businesses, providing an efficient means to reach their target audience without a hefty financial commitment.

# Personal data protection: 404 not found

Despite experiencing numerous data breaches in Indonesia, the country's Gen Z remain largely unconcerned about personal data protection. Across all socio-economic backgrounds, awareness of personal data security remains low. An overwhelming 89% of Gen Z express comfort with the current state of affairs, while only a minority of 11% are dissatisfied with the inadequate level of personal data protection. This data suggests that there is a significant need for increased awareness and education on the importance of safeguarding personal information among Indonesian Gen Z to address the prevailing complacency towards data privacy.

## Cases of alleged data leaks in Indonesia this year include:

**19.56**  
million

customers of BPJS  
Ketenagakerjaan Indonesia  
(Indonesia's Workers Social  
Security Agency)

**1.5**  
terabytes (TB)

of personal data of Bank  
Syariah Indonesia (BSI)  
users

**35**  
million

data records from  
MyIndiHome users

**34.9**  
million

personal data records  
from Indonesian citizens'  
passports

The lack of concern among Indonesian Gen Z regarding their data being collected and used for commercial or political purposes is indeed concerning, especially in the context of the upcoming elections in 2024. As digital platforms become increasingly intertwined with political campaigns, there is a heightened risk of data being leveraged for targeted political advertising and manipulation. Given the potential for massive spending on political ads on social media during the election period, it becomes even more critical for Gen Z and all citizens to be vigilant about their data privacy.

In October 2022, Indonesia passed a personal data protection law, signifying a significant step towards safeguarding individuals' personal information. However, as of the writing of this report, there has been no implementation of the law yet. The

delay in implementation may be attributed to various factors, including the need for additional regulations, preparation of necessary infrastructure, and awareness campaigns to ensure effective enforcement. The introduction of this legislation reflects the country's recognition of the importance of data privacy and aims to provide stronger legal protections for individuals' personal data. As the implementation process progresses, it is anticipated that the law will play a crucial role in enhancing data security and privacy practices across the nation.



# Welcome to the data privacy jungle: Doxxing prevalence in Indonesia

The alarming trend of doxxing, where individuals' personal data is leaked on social media platforms, has become increasingly prevalent in Indonesia – which goes to show how lax data protection is in Indonesia. Victims of doxxing encompass a wide spectrum, ranging from alleged scammers and sexual abusers to ordinary users who inadvertently find themselves at the center of online hostility and scrutiny. The speed at which these incidents unfold, often turning an individual into the antagonist of the day within minutes, underscores the potential dangers and lasting consequences of such actions.

The impact of doxxing on victims can be devastating, leading to privacy violations, harassment, online bullying, and even offline repercussions. The practice not only violates personal boundaries but also has broader implications for society, including the erosion of trust in online platforms and the potential for misuse of personal data for malicious purposes.

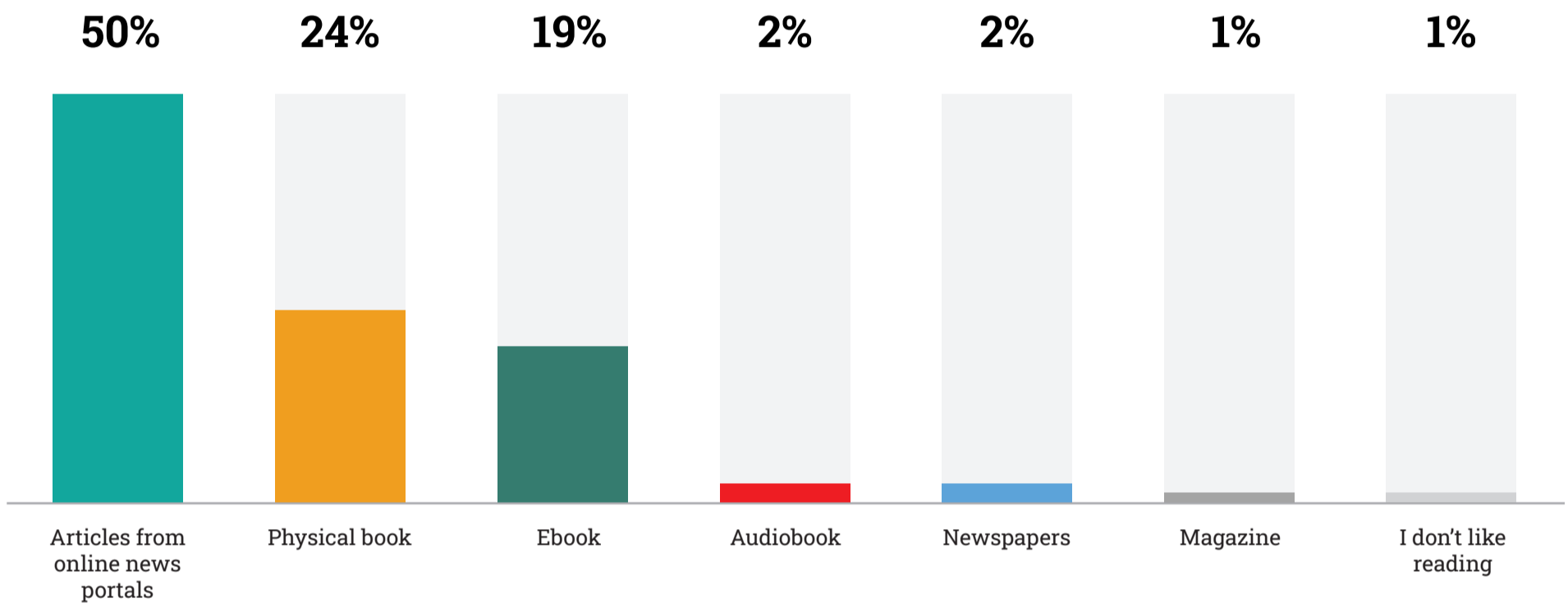
Addressing the issue of doxxing requires collaborative efforts from social media companies, law enforcement, and the wider online community. Implementing stringent policies against doxxing, along with reporting mechanisms to swiftly address instances of data leakage, is essential to deter such harmful practices. Furthermore, public awareness campaigns can educate users about the serious consequences of doxxing and promote responsible online behavior and digital citizenship.

As doxxing incidents continue to unfold, it becomes increasingly evident that safeguarding personal data and respecting others' privacy is of utmost importance in the digital age. Only through collective action and a shared commitment to data privacy can we work towards creating a safer and more respectful online environment for all users.



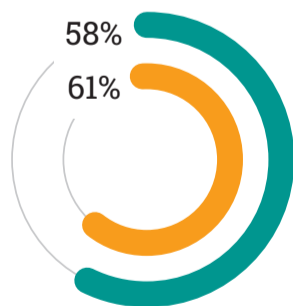
# Reading Behavior

It's hardly surprising that Gen Z exhibits distinct habits compared to older generations. Rather than subscribing to newspapers for their morning news fix, Gen Z are turning to social media and online news portals first thing in the morning. While some still engage with physical books, a growing number of Gen Z are embracing ebooks and even redefining reading by opting for audiobooks.

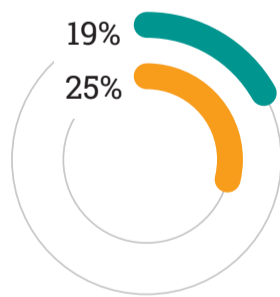


Gen Z shows a penchant for reading across various genres, although a noticeable inclination for fiction genres is observed among females, while males tend to lean more towards biographies. It's worth noting that most Gen Z, irrespective of gender, express an affinity for reading across all genres.

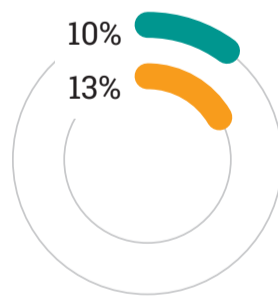
## All Genres



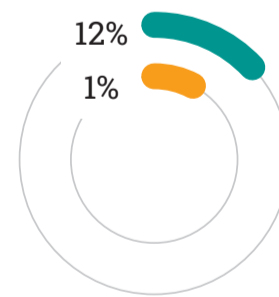
## Fiction



## Non Fiction



## Biography



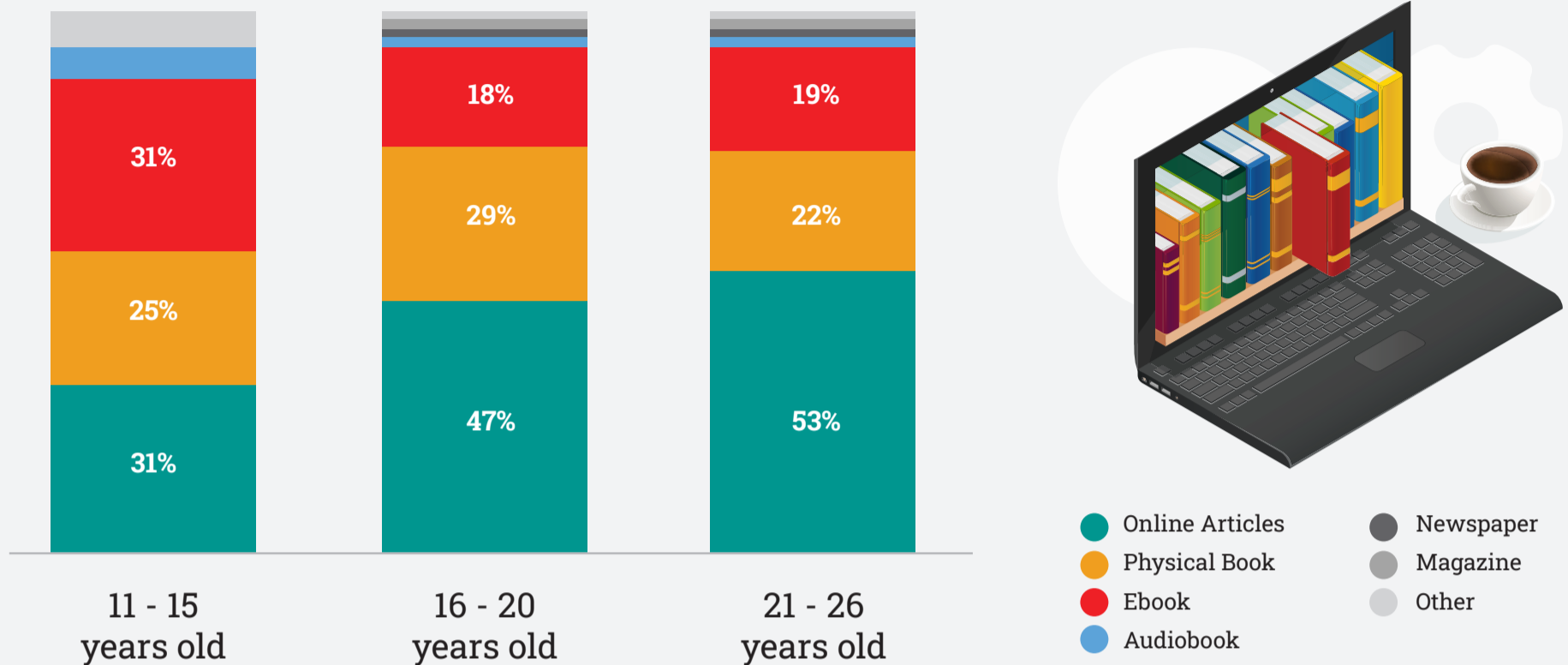
Male  
Female

A notable generational shift can be observed among Gen Z when it comes to their reading preferences. Younger members of Gen Z (aged 11-15) appear to be gravitating towards books as their preferred medium of reading, in contrast to their older counterparts (aged 16-26) who lean more towards news articles. This disparity

could be attributed to the varying life stages of these subgroups. Older Gen Z individuals, many of whom are deeply engrossed in higher education or starting their careers, often find themselves with limited leisure time. Consequently, they may opt for the brevity and immediacy of news articles over the commitment of reading books.



## Ebook adoption is much higher for the younger Gen Z



\*The total percentage may not add up to 100% since we are only showcasing the top 3 choices.

On the other hand, younger Gen Z members seem to have a stronger affinity for digital books. This could signify a positive trend, suggesting that these young readers are resourceful in finding ways to access books, despite the relatively high cost of printed books in Indonesia. However, it's important to acknowledge the possibility that some may resort to reading pirated PDFs, which are readily available on Indonesian e-commerce platforms, potentially raising concerns about intellectual property rights and ethical consumption in the digital age.

## Literacy rate: It's not the lack of interest, it's the access to quality and age-appropriate books

The reading habits of Gen Z underscore the imperative to enhance access to literature and reading materials in Indonesia. There has long been an assumption that younger individuals are disengaging from reading altogether and opting for short-form video on social media, whereas the true challenge may stem from the limited availability of books. This highlights the importance of addressing the issue of accessibility rather than assuming a decline in interest in reading among the youth.



The challenge of access applies to both physical and digital books. Adi Sarwono, the initiator of the “Busa Pustaka” literacy movement in the Lampung Province, shared in an interview with IDN Times that many residents in remote areas still struggle to access books and reading materials on the internet. This is due to the fact that Indonesia continues to grapple with issues of internet accessibility and the digital divide.

“It’s not that their reading interest was low but they were struggling to access books. When I come to new places, they become very enthusiastic as soon as they get access to read,” said Adi. He further mentioned that literacy nowadays is not only limited to books but also digital literacy. Hence, he also teaches children in Lampung to use their gadgets wisely and effectively to gain information and knowledge.

Certainly, one of the most notable examples showcasing how providing access to books and reading materials can contribute to increasing the literacy rate among youth is the transformation of the Jakarta library. Following its renovation, the library has emerged as a popular destination for many young individuals. Over the weekends, around 1,100 to 1,500 people visit the Jakarta library.

However, this success story is an exception rather than the norm. Local libraries are facing challenges in attracting visitors.

The condition of many libraries owned by the Central Java province and districts/cities requires improvement, both in terms of book collections and creating a more comfortable environment for the public to visit.

Alfius Demena, the Head of the Library and Archives Office in Jayapura Regency, pointed out that the lack of visitors to local libraries is largely due to the lack of a conducive reading atmosphere and inadequate building conditions. Some libraries in Jayapura in 2022 saw only a few dozen visitors per day.

Even Tangerang, which is in close proximity to Jakarta, is facing difficulties in maintaining its libraries. According to observations by [beritatangerang.id](http://beritatangerang.id), no library staff can be seen at the Batuaceper District Library in Tangerang City. The space appears neglected, covered in dust with shelves and books showing signs of disarray.

Afdel, a volunteer at the Batuaceper Sub District Library for the 2019-2020 period, mentioned that each library should ideally have staff members. According to regulations, Afdel explained, every library should be managed by a civil servant and a non-civil servant. However, this is not the case for the libraries in the 13 districts of Tangerang City. “So, out of the 13 districts, only 7 have functioning libraries. And even those are not running at their full potential,” he stated.

Mulyanto, the Chairman of the Indonesian School/Library Forum, emphasized that school libraries are still not regarded as a vital component in supporting educational quality. He highlighted this in an interview with [Kompas.id](http://Kompas.id) on October 17, 2021, in Jakarta, explaining that school libraries have yet to be recognized as an integral part of enhancing education.

Indeed, various community-driven initiatives have emerged to promote a culture of reading. Apart from the previously mentioned “Busa Pustaka” literacy movement in the Lampung Province, another noteworthy example is the Bookhive initiative. This initiative involves the installation of dedicated bookshelves in public parks across Jakarta, where individuals are encouraged to both contribute books and borrow them. These bookshelves serve as accessible and informal libraries, allowing people to engage with books in a convenient and community-oriented setting. Such initiatives highlight the collective efforts to foster a love for reading and make books more easily accessible to the public.

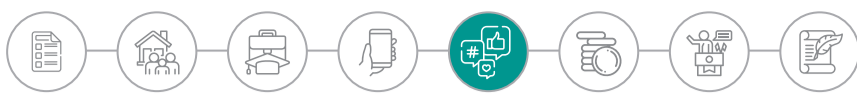




## Chapter 4

# Entertainment, Hobby, and Leisure

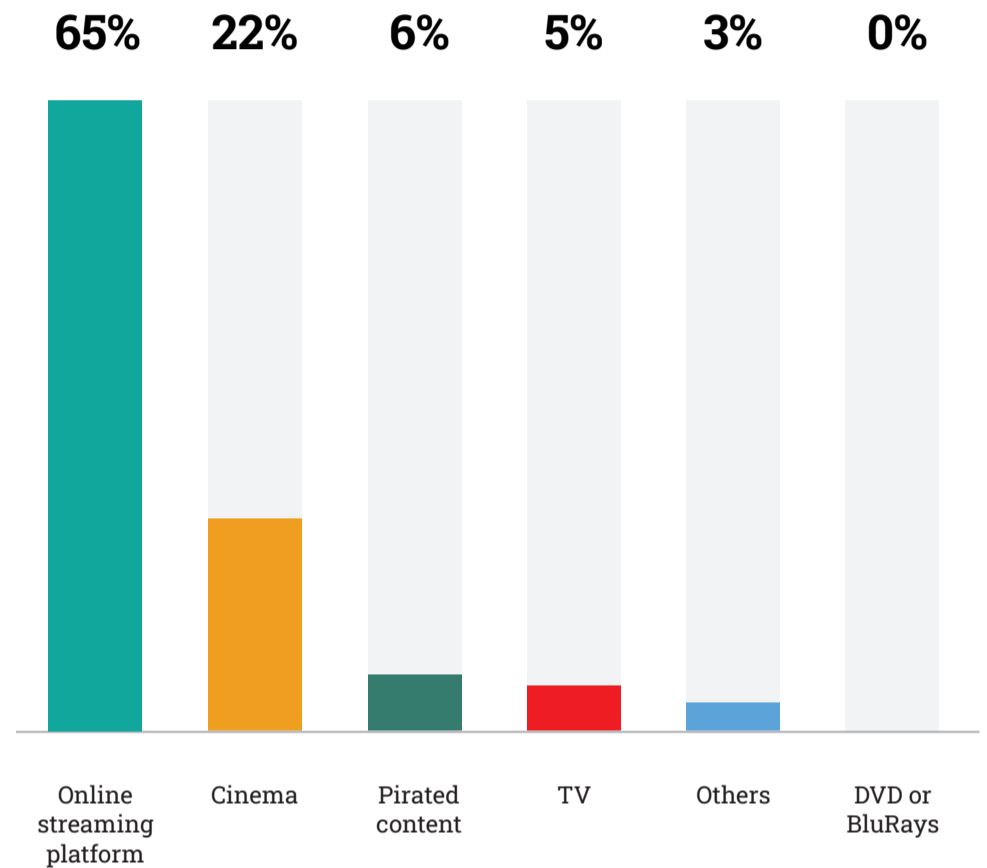




# Movie Watching Behavior

## Gen Z prefers streaming platform due to affordability, ability to do binge-watching, and convenience

The majority of Generation Z, comprising 65%, opt to watch movies and series on streaming platforms, in stark contrast to the 22% who still choose the traditional cinema experience. This preference for streaming platforms can be attributed to several key factors. First and foremost, Gen Z's choice is driven by affordability, as many of them have limited disposable income to allocate for costly cinema outings. Going to the movies often entails expenses that extend beyond just ticket prices, including snacks, transportation, and parking fees, which can strain their budget. Additionally, the pervasive nature of social media in today's world has created a unique pressure to binge-watch content. Gen Z, eager to avoid spoilers and the fear of missing out (FOMO), often gravitates towards streaming platforms to catch up on shows or films. Moreover, many members of Gen Z still reside with their families, and frequenting cinemas may not always align with family expectations, leading them to opt for the convenience and privacy of home-based entertainment.

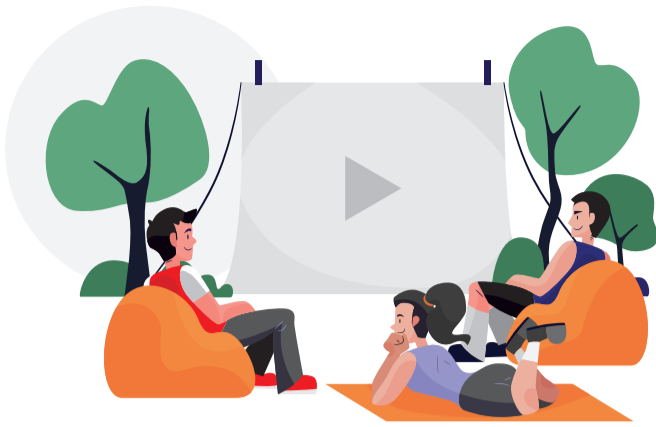


| Age Group | Netflix | Disney + | Viu | Apple TV | Prime Video | Vidio | WeTV | MOLA | Others | Non User |
|-----------|---------|----------|-----|----------|-------------|-------|------|------|--------|----------|
| 11 - 15   | 25%     | 25%      | 13% | 0%       | 0%          | 0%    | 1%   | 1%   | 6%     | 30%      |
| 16 - 20   | 57%     | 11%      | 6%  | 1%       | 3%          | 9%    | 2%   | 1%   | 3%     | 7%       |
| 21 - 26   | 54%     | 9%       | 6%  | 1%       | 3%          | 8%    | 2%   | 3%   | 2%     | 11%      |

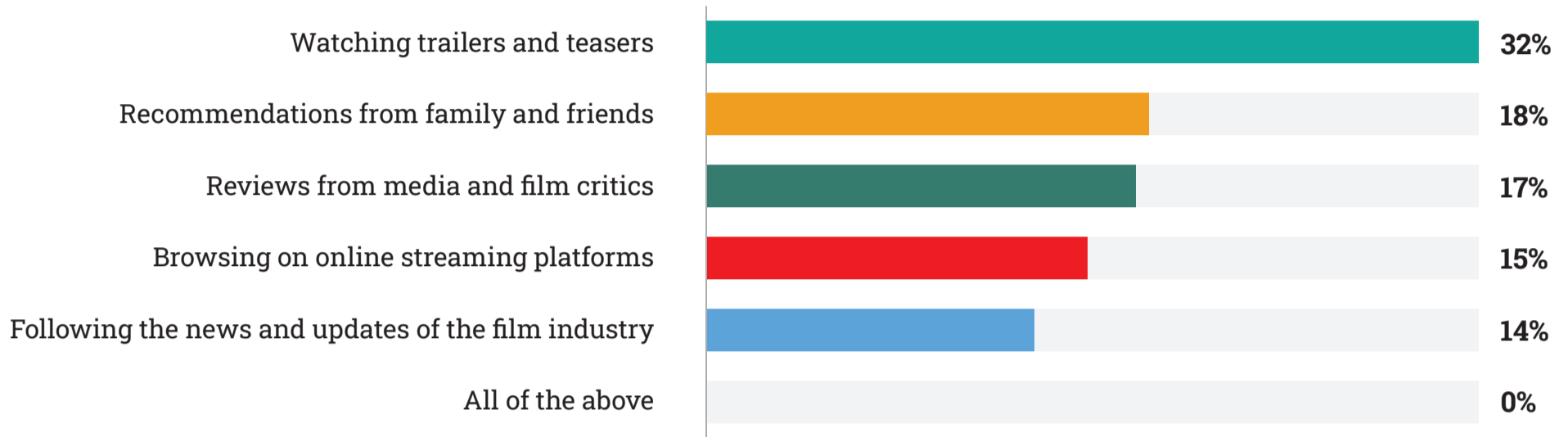
The surge in popularity of streaming platforms can also be attributed to the prevalence of account sharing. Numerous small entrepreneurs have seized the opportunity to offer shared slots on streaming platform accounts, making it more cost-effective for individuals. This trend has enabled many to access premium content without the burden of full subscription costs. Furthermore, streaming platforms frequently offer promotions and incentives for new subscribers, making their services even more appealing to Gen Z and others. These promotions not only attract new users but also contribute to the sustained growth of streaming services, reinforcing their position as a dominant force in the entertainment landscape.

A distinction emerges in the streaming platform preferences of younger Gen Z (ages 11-15) compared to their older counterparts (ages 16-26). The older cohort tends to favor Netflix, whereas the younger group leans towards Disney+. This preference could be influenced by the nature of content offered on each platform. Disney+ is known for its family-friendly content, while Netflix offers a more diverse range of content, including material with age restrictions.

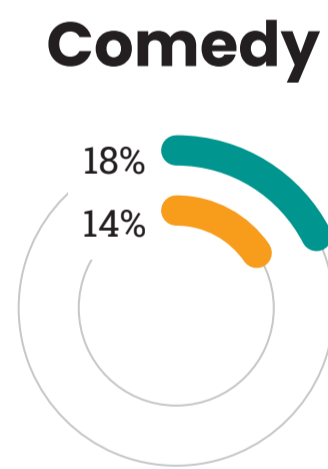
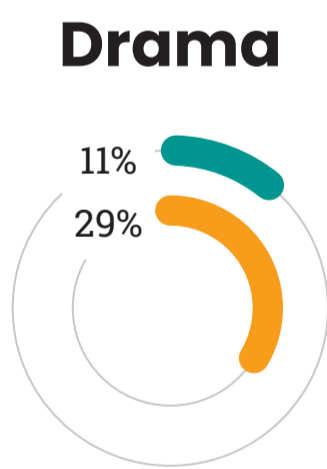
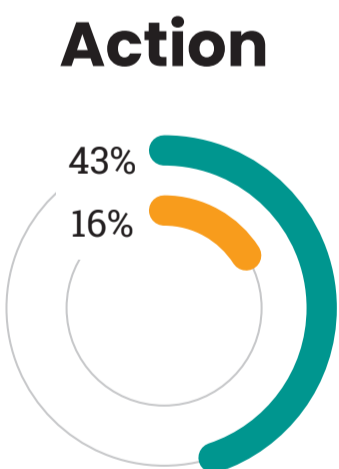
Younger members of Gen Z are also exploring Viu as a streaming platform, primarily because it provides a free option supported by advertising for non-subscribers. This approach aligns well with the financial constraints faced by younger Gen Z individuals who often have limited pocket money to allocate towards entertainment expenses.



Indonesian Gen Z exhibit diverse methods of discovering movies. Approximately one-third of them watch trailers and movie scenes, while the significance of word-of-mouth recommendations from friends and family is on par with that of movie critics and media reviews. Additionally, they explore movie catalogs within their online streaming platforms. These trends underscore the essential role of effective marketing in the film industry, as trailers prove more accessible than reviews, and the influential power of word-of-mouth equals that of professional critics.

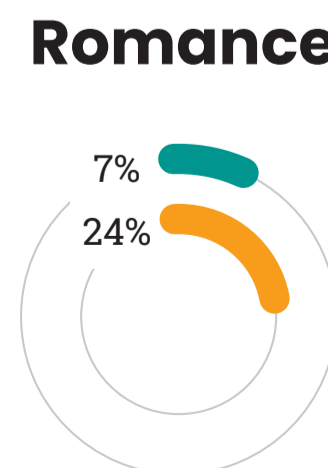
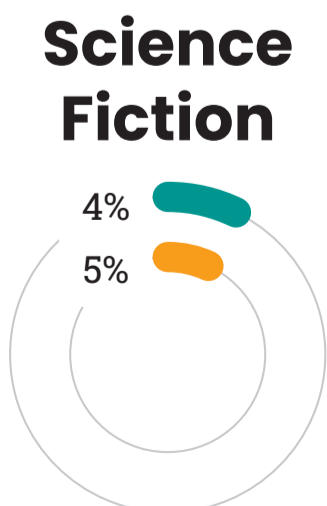
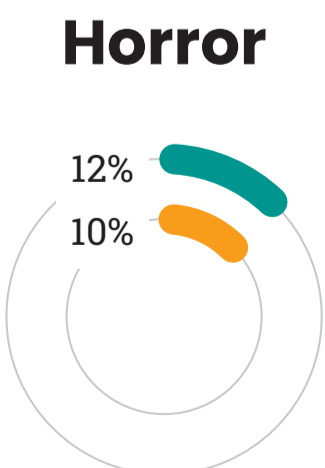


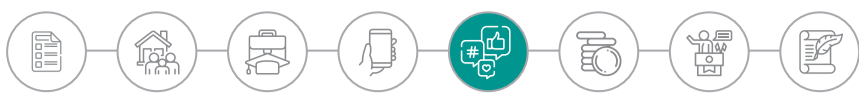
Among Indonesian Gen Z, action, drama, and comedy emerge as the most favored movie genres. Yet, a captivating trend is revealed when considering gender-related preferences. Notably, 43% of men exhibit a preference for action films, in contrast to 16% of females. On the other hand, 29% of females express a liking for drama, and 24% lean towards romance, while merely 11% of men enjoy drama and merely 7% find romance appealing.



Male  
Female

\*The total percentage may not add up to 100% since we are only showcasing the top 6 choices.





The genre preferences of Gen Z are strongly echoed in their choices of favorite actors, actresses, movies, and series, as evident from our survey findings. Notably, Iqbaal Ramadhan, known for his roles in drama, emerges as the most popular Indonesian actor among Gen Z. Maudy Ayunda, an actress with more than a decade of experience, is also popular among Gen Z for both her acting and her image as a highly-educated female.



### Most Popular Indonesian Actor and Actresses



Iqbaal Ramadhan



Angga Yunanda



Maudy Ayunda



Shenina Cinnamon



Aghniny Haque

### Most Popular International Actor and Actresses



Tom Holland



Andrew Garfield



Margot Robbie



Zendaya



Jenna Ortega

### Most Popular Movies



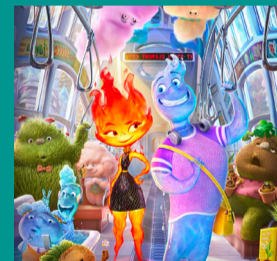
Barbie



Guardians of The Galaxy Vol.3



Oppenheimer



Elemental



The Super Mario Bros. Movie

### Most Popular Korean Drama



The Glory



Crash Course in Romance



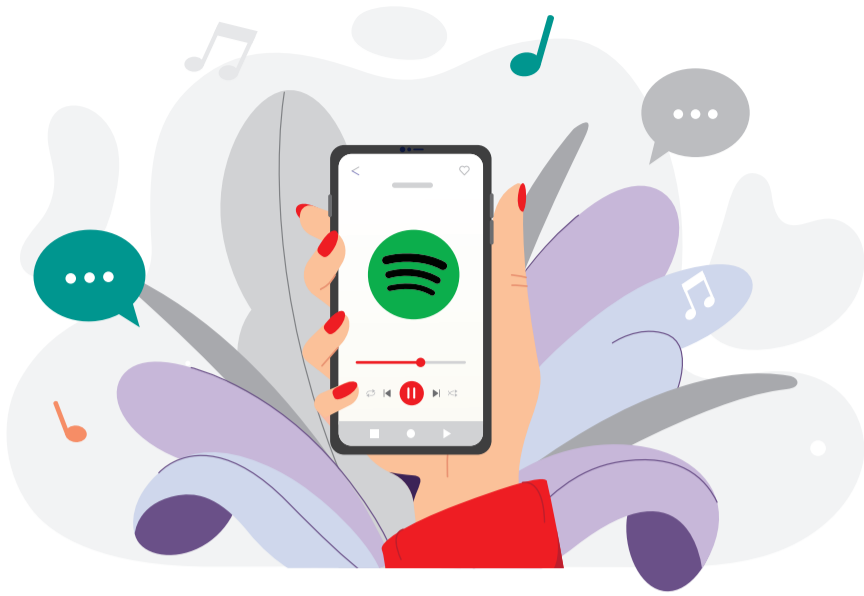
Celebrity



The Good Bad Mother



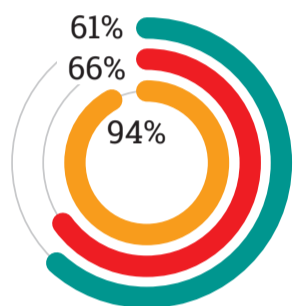
Doctor Cha



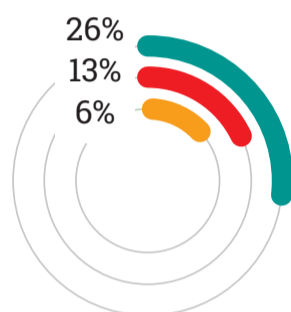
## Music Listening Behavior

Spotify emerges as the favored music application across all ages, and the pop genre resonates as the most popular choice among Gen Z. The widespread popularity of Spotify could be attributed to its offering of both free and premium versions, catering to different user preferences. It's also noteworthy that the prevalence of pirated application usage cannot be discounted.

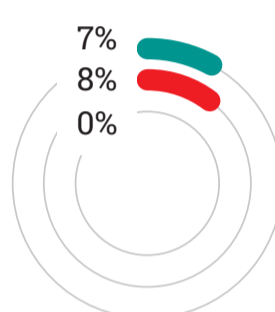
### Spotify



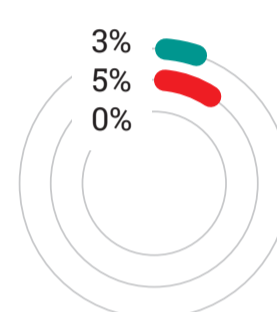
### YouTube



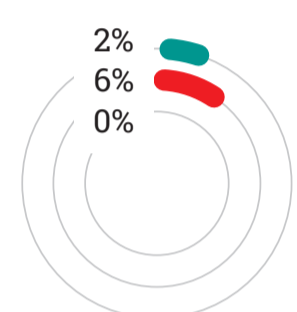
### YouTube Music



### Joox



### Apple Music



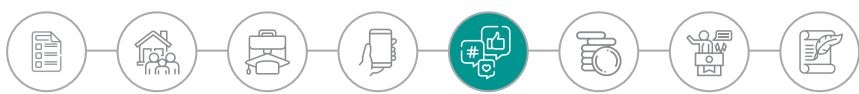
- 21 - 26 years old
- 16 - 20 years old
- 11 - 15 years old

\*The total percentage may not add up to 100% since we are only showcasing the top 5 choices.

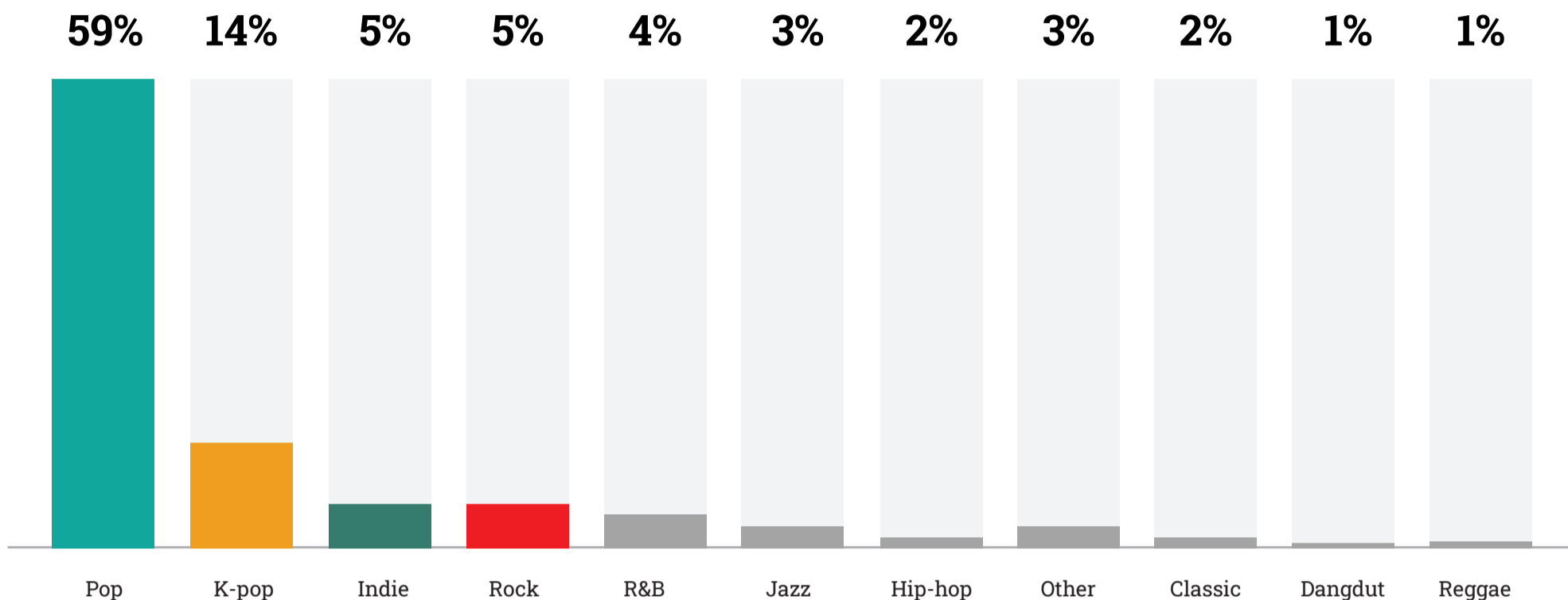
Curiously, a larger proportion of Indonesian Gen Z opt to listen to music on YouTube rather than the more audio-focused YouTube Music. This inclination may be attributed to the free accessibility of YouTube, which includes ads, and the additional data benefits provided by certain internet providers. In contrast, YouTube Music is exclusively available to YouTube Premium subscribers.

Pop stands as the dominant music genre embraced by Gen Z, commanding a 59% preference, followed by K-Pop and Rock. This surge in K-Pop and Rock's popularity can be attributed to the growing fascination with Korean culture on a broader scale. Jakarta, in particular, has emerged as a sought-after stop for K-Pop groups and idols during their tours across Asia. Notably, Indonesia houses some of the most fervent global fandoms, showcasing the substantial influence and reach of these musical genres.





## K-Pop’s appeal transcends age and gender boundaries

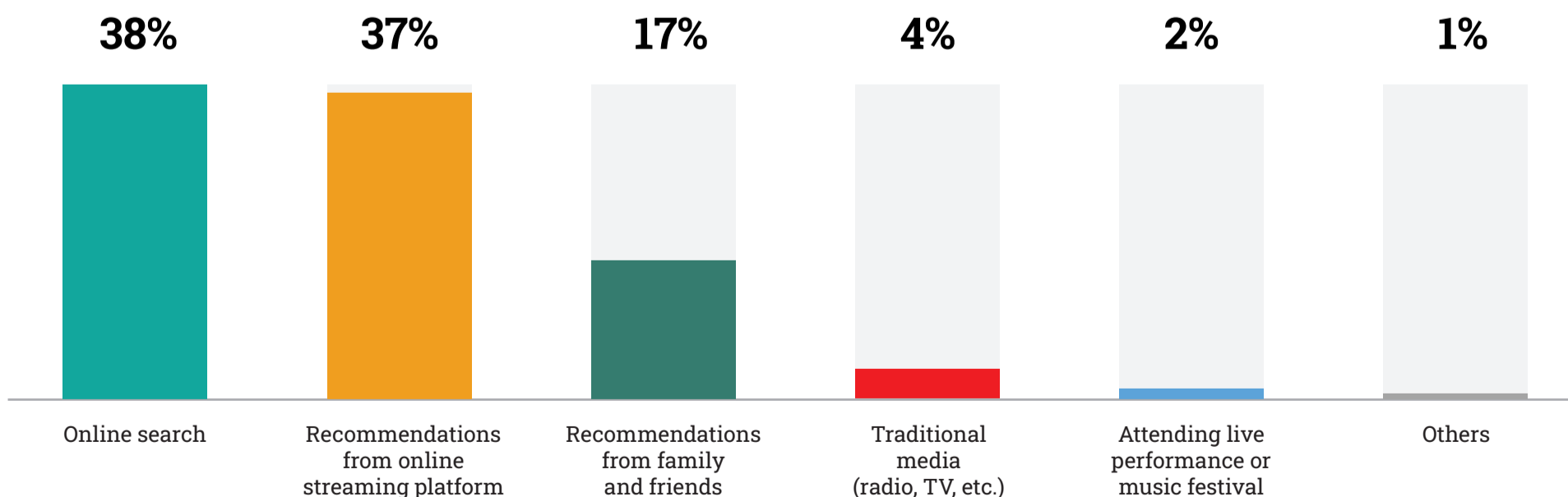


Contrary to the prevailing stereotype associating K-Pop listeners primarily with young females, our survey reveals that K-Pop enjoys a diverse audience of Gen Z individuals spanning both genders. This phenomenon can be attributed to the prolonged and steady rise in K-Pop’s popularity over the years.

Gen Z have integrated music into their daily routines, frequently engaging in music discovery and actively seeking out new songs through online searches. An interesting trend emerges, with a significant 38% of Gen

Z expressing that they rely on music recommendations provided by streaming platforms. Surprisingly, this figure is double the 17% who turn to friends for musical suggestions. This phenomenon suggests a shift where algorithms wield more influence in shaping music preferences compared to traditional personal recommendations, highlighting the growing impact of digital platforms on musical choices.

## How do Indonesian Gen Z discover new music?





### Most Popular Indonesian Musicians



Nadin Amizah



Idgitaf



Ardhito Pramono



Isyana Sarasvati

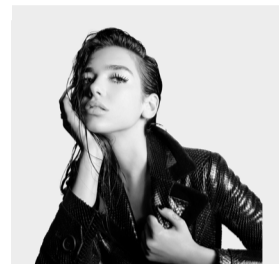


JKT48

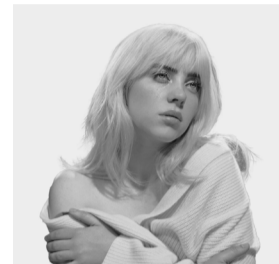
### Most Popular International Musicians



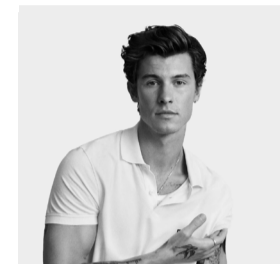
Ariana Grande



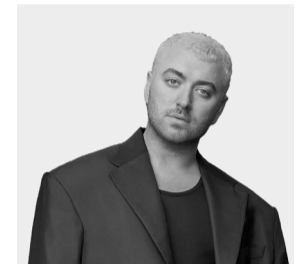
Dua Lipa



Billie Eilish



Shawn Mendes



Sam Smith

### Most Popular K-Pop Artists



NCT127



AESPA



Le Sserafim



AKMU

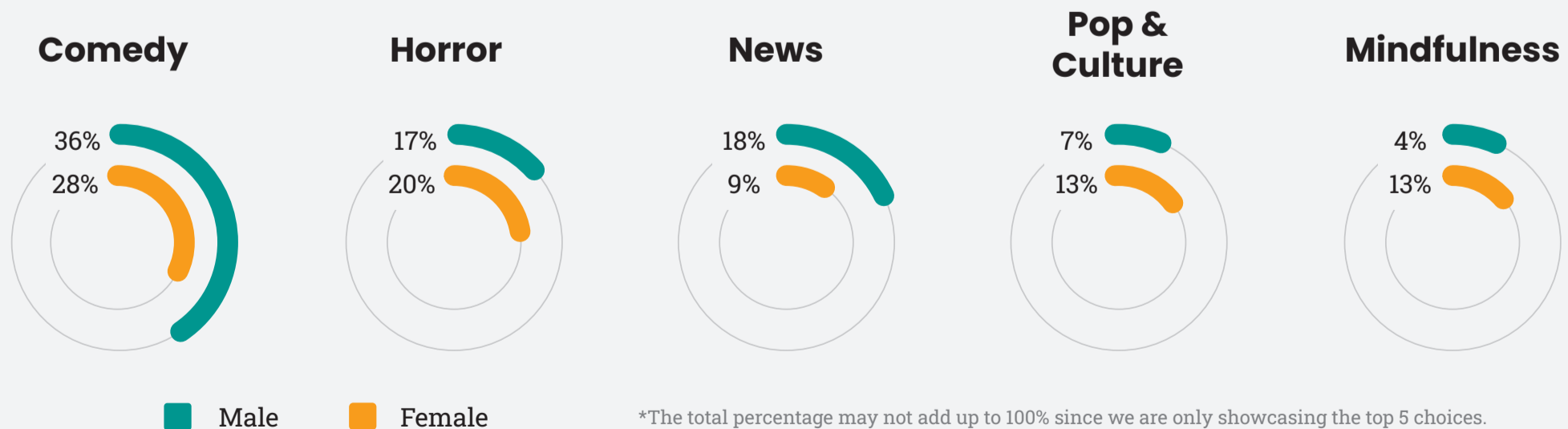


Kang Daniel

## Podcast Listening Behavior

The podcast phenomenon has firmly established its presence, with 64% of Gen Z actively engaging in podcast consumption. The most popular podcast topics among them encompass a diverse range, including Comedy (31%), Horror (19%), News (13%), Pop & Culture (11%), and Mindfulness (9%). This interest is evenly spread across genders, highlighting the broad appeal of these topics among both male and female listeners.

### Make me laugh then make me feel: Indonesian Gen Z like comedy podcast, while mindfulness content is also rising in popularity



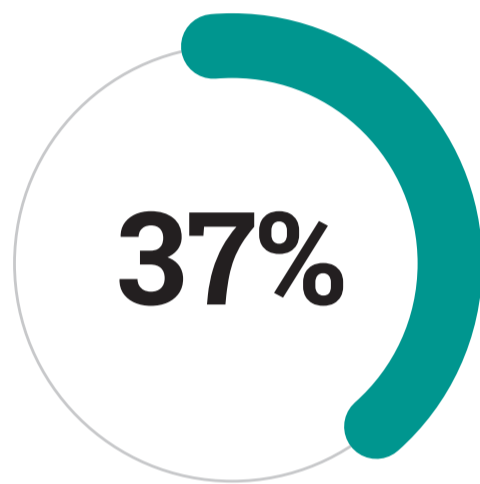
\*The total percentage may not add up to 100% since we are only showcasing the top 5 choices.



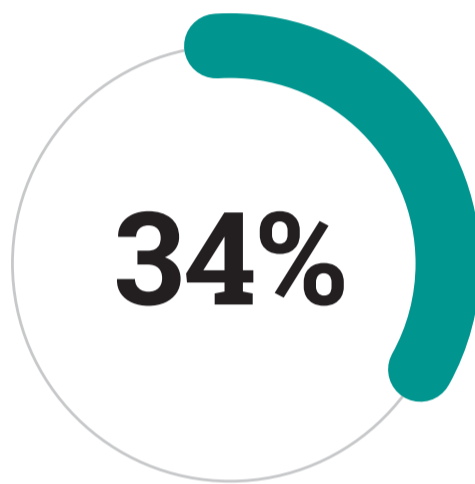
Podcasts in Indonesia are available in diverse formats, spanning both audio and video options. Among Indonesian podcast enthusiasts, YouTube stands out as the predominant platform of choice. This preference for YouTube could be attributed to its ad-supported

free model and the additional data quota that certain internet providers offer for YouTube usage. Additionally, the visual component adds an engaging dimension to YouTube podcasts, setting them apart from purely audio-based alternatives.

## YouTube



## Spotify



## Noice



\*The total percentage may not add up to 100% since we are only showcasing the top 3 choices.





Indonesian Gen Z exhibit a strong preference for podcasts hosted by public figures, indicating a continued emphasis on the personality of the host rather than solely the content. This inclination aligns with the dominant comedy genre favored by Indonesian Gen Z. Public figures often possess specialized training in entertainment, making them more adept at engaging and entertaining listeners, which contributes to their popularity in the podcasting realm.

A noteworthy distinction in podcast listening behavior between Generation Z and Millennials is the Gen Z preference for mindfulness content. This inclination sheds light on the popularity of podcasts like "Rintik Sedu," hosted by writer Nadhifa Aliya Tsana. Her podcast offers a soothing and contemplative experience, serving as a valuable resource for Gen Z in addressing personal issues and fostering mindfulness. This shift towards content that promotes mental well-being and self-awareness reflects Gen Z's proactive approach to managing their emotional and psychological health, setting them apart from previous generations.



Close The Door



Rintik Sedu



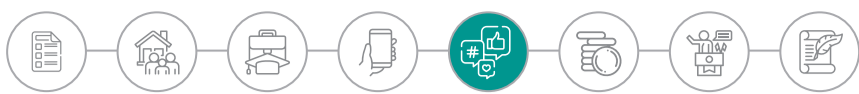
Do You See What I See



Curhat Bang



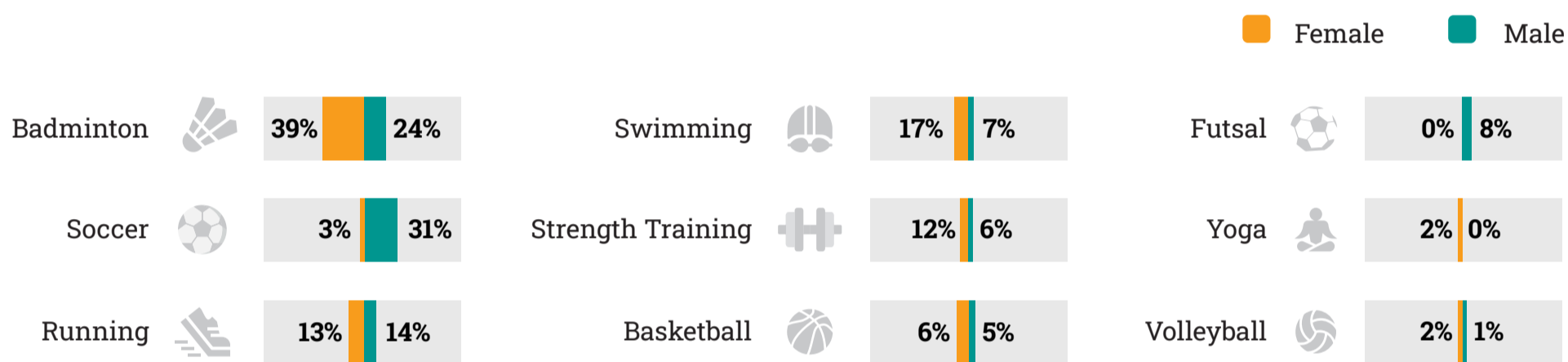
Podcast Raditya Dika



# Health & Sport Behavior



When surveying Indonesian Gen Z about their preferred sports, whether as participants or spectators, it becomes evident that females tend to have a broader spectrum of sports interests compared to men. Among Indonesian female Gen Z, badminton emerges as the most favored sport, while soccer holds the top spot for their male counterparts.



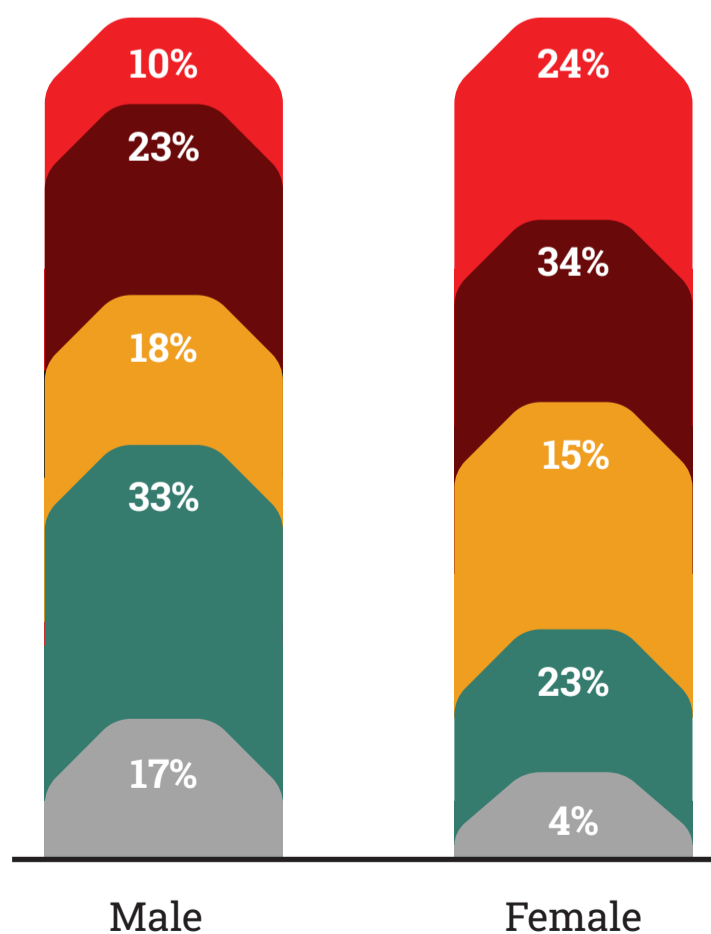
\*The total percentage may not add up to 100% since we are only showcasing the top 9 choices.

Among Gen Z surveyed, a notable 18% admit to rarely engaging in physical exercise, which is a considerably smaller portion when compared to those who claim to exercise regularly. Specifically, 9% of Gen Z incorporate exercise into their daily routines, while 27% do so a few times a week, 16% on a weekly basis, and 29% a few times a month.

The survey results further indicate that males tend to exercise more frequently than their female counterparts. This discrepancy might be attributed to safety concerns, as exercising outdoors might be perceived as safer for males, while some females might feel uncomfortable doing so. Additionally, the dual responsibilities that females often shoulder in both the workplace and at home could potentially diminish their available free time for workouts.

- Rarely or never
- Few times a month
- Once a week
- Few times a week
- Everyday

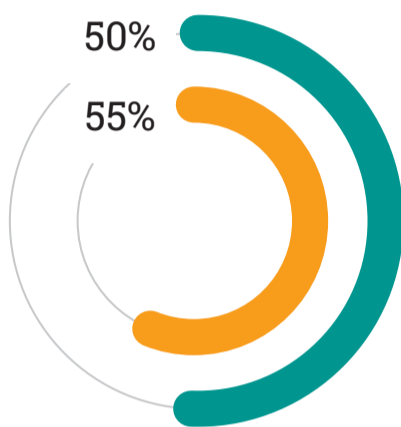
## How often do Indonesian Gen Z exercise?



More than half of the Gen Z express a preference for watching sports from the comfort of their homes via TV or streaming platforms. Among these, approximately 33% opt for streaming platforms as their favored means of consumption. Conversely, a mere 9% of Gen Z indicate a preference for attending live sports events, and this demographic is predominantly male. This trend could be attributed to the limited availability of secure spaces for female spectators in traditionally male-dominated sports fields, such as soccer, for instance. Moreover, Gen Z who are still young and living with their parents and extended family might have less freedom to go out and watch sports events in person.

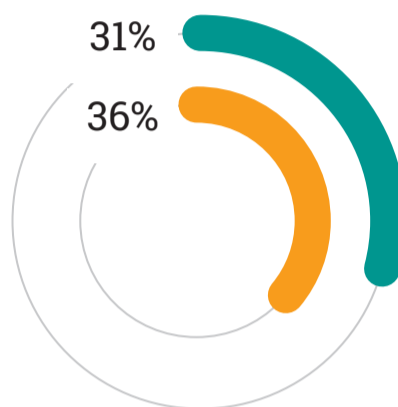


### Television



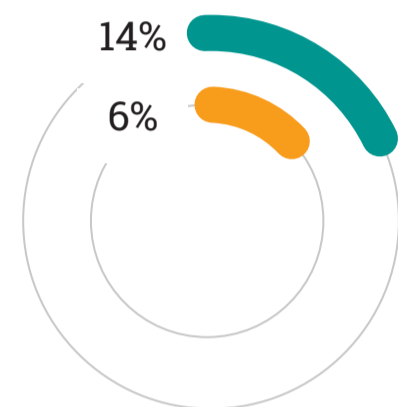
Male Female

### Streaming



\*The total percentage may not add up to 100% since we are only showcasing the top 3 choices.

### Sport Venue



Anthony Ginting



Marcus Fernaldi Gideon & Kevin Sanjaya Sukamuljo



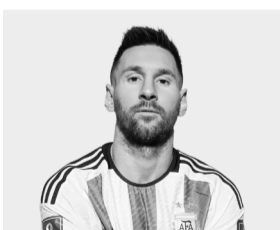
Greysia Polii



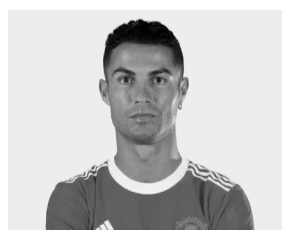
Jonatan Christie



Pratama Arhan



Lionel Messi



Cristiano Ronaldo



Viktor Axelsen



Kento Momota



Serena Williams

## Most popular Indonesian athletes

Indonesia's adoration for badminton is vividly evident in the fact that the most beloved Indonesian athletes are dominated by badminton players. The nation's unwavering passion for this sport is further validated by its consistent international success. An illustrative example is Greysia Polii, who retired in 2022, and her remarkable achievement of clinching Indonesia's inaugural women's doubles gold at the 2020 Summer Olympics, achieved alongside Apriyani Rahayu.

## Most popular international athletes

Within the realm of international athletes, Indonesian Gen Z have exhibited a strong affinity for soccer players, with three out of the top five most revered figures hailing from this sport. The other two, Viktor Axelsen and Kento Momota, are renowned badminton players.



## When Gen Z think about sports, they often consider various aspects:

Exercise plays a crucial role in their thoughts, as it aids in preserving their physical fitness, alleviating stress, and enhancing their overall quality of life.

The notion of exercise as a means to sustain their physical appearance and boost their self-assurance is a significant factor.

Many Gen Z view exercise as a way to connect with like-minded individuals who share their interest in sports.

The influence of digital technology on sports captivates their attention, potentially altering their perception of the sports landscape.

The personal challenge and pursuit of self-actualization are also integral components, as sports present opportunities for individual growth.

**Above all, sports are seen as a source of entertainment and enjoyment, offering a space for leisure and pleasure in their lives.**

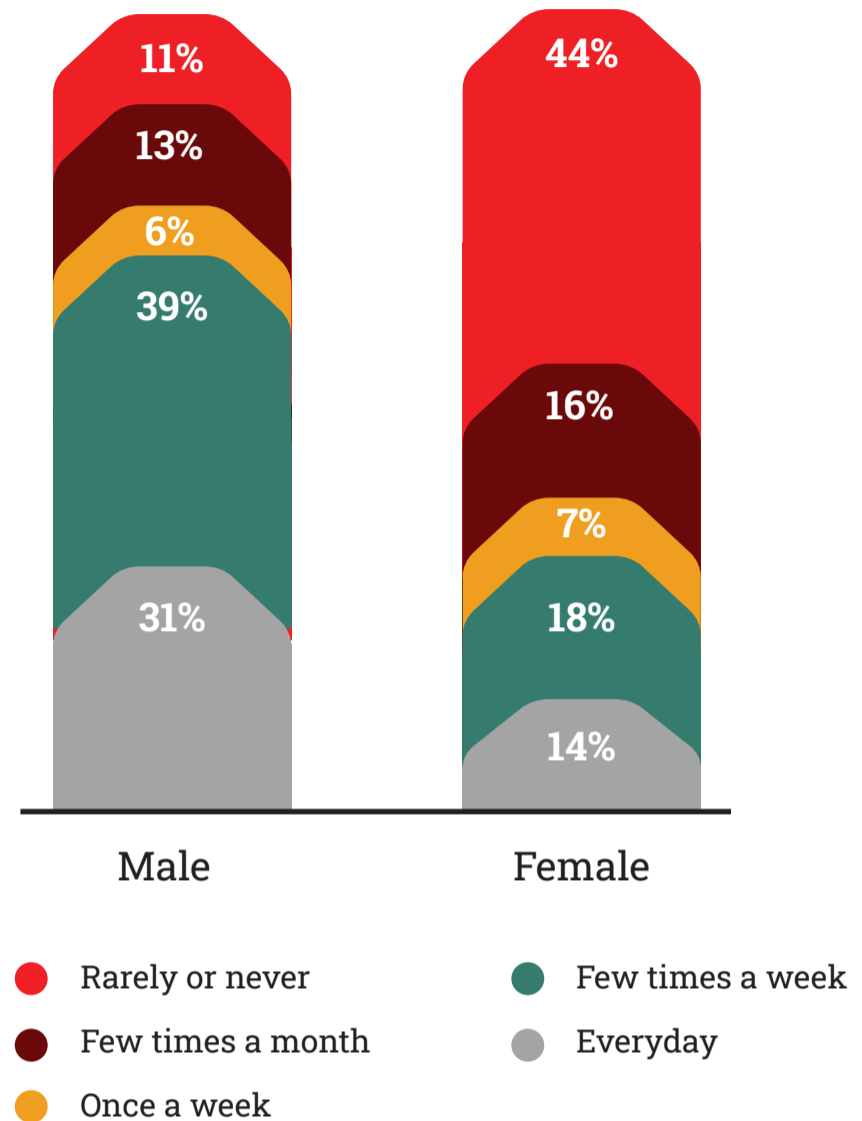


# Gaming Behavior

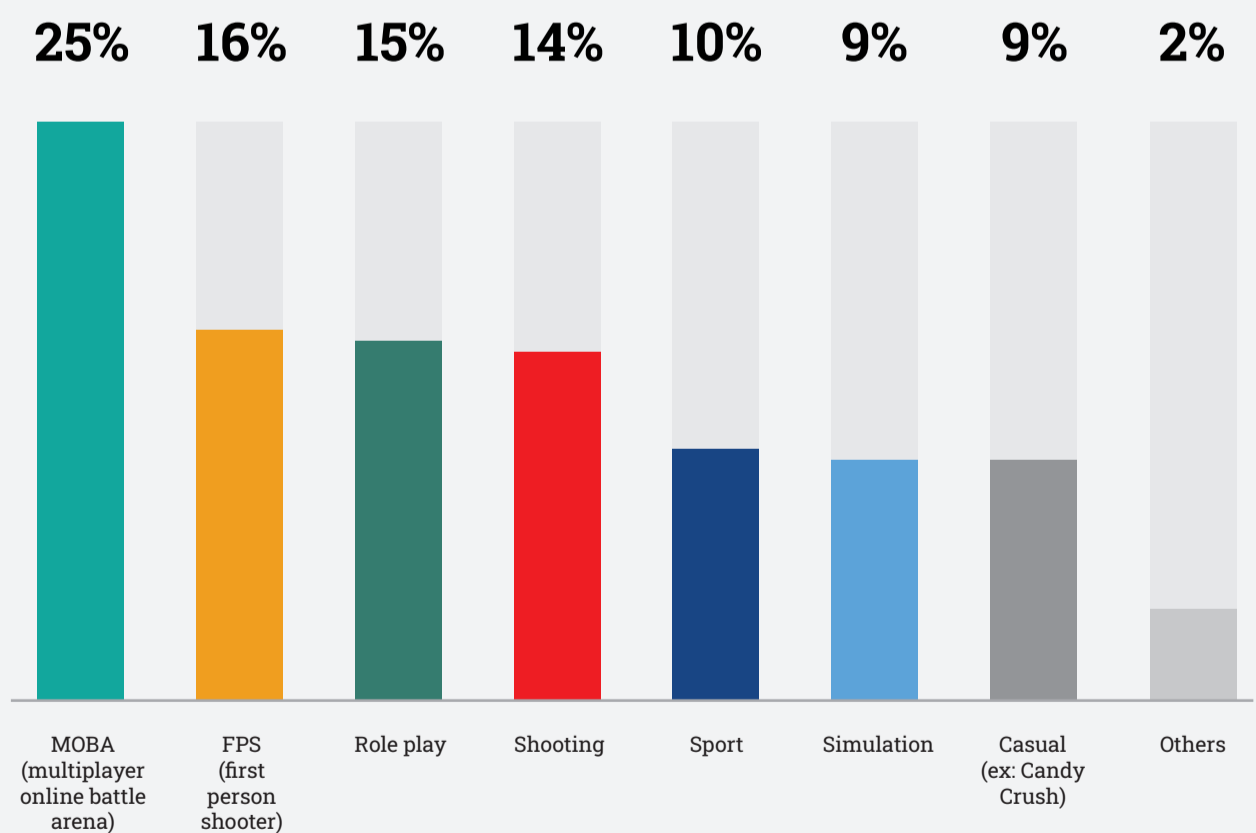
Roughly 43% of Gen Z reveal a daily penchant for playing games. Interestingly, a notable gender gap becomes evident, with a substantial 89% of men displaying a preference for gaming, compared to 56% of females. Among those who engage in gaming, the majority (76%) opt for mobile phones, while PC gaming constitutes 18%, and console gaming makes up 6%.

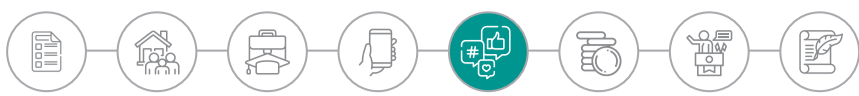
The preference for mobile gaming among the majority, accounting for 76% of gamers, can be attributed to its suitability for casual players. Mobile phones offer a convenient and accessible gaming experience, making it an ideal choice for those who enjoy gaming on the go or in short bursts of leisure time. Furthermore, mobile gaming is often the most cost-effective option when compared to the expense of investing in a gaming PC or console. The affordability and versatility of mobile phones as gaming devices make them an attractive choice for a wide range of players, from casual enthusiasts to those looking for budget-friendly gaming alternatives.

## How often do Indonesian Gen Z play games?



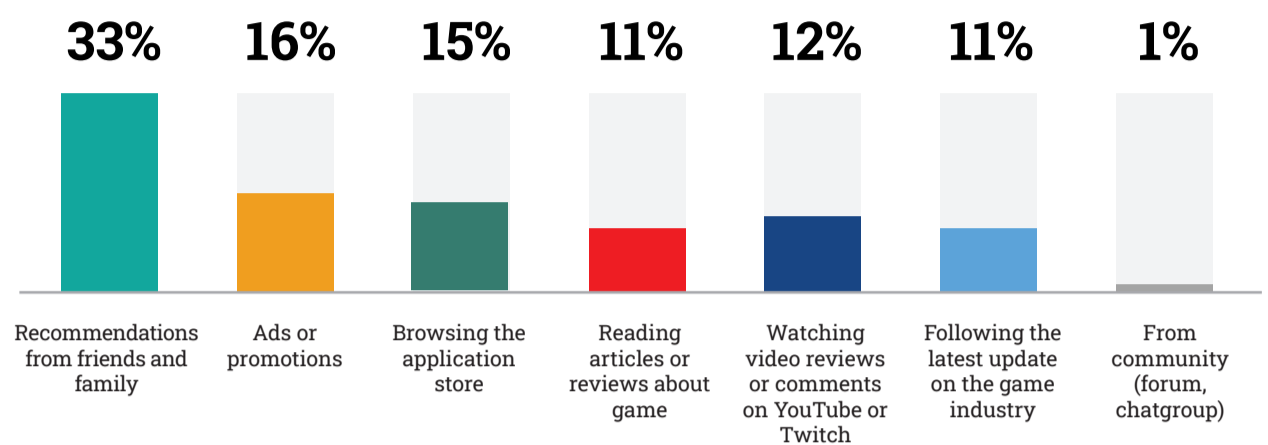
A quarter of Gen Z, accounting for 25%, have a penchant for playing games from the MOBA (multiplayer online battle arena) genre. This preference is closely followed by other genres like FPS (first person shooter), role play, and shooting, which also rank as popular game choices among Gen Z. Interestingly, 2% of respondents have an open-minded approach and enjoy trying games from various genres, showing a versatile gaming interest.



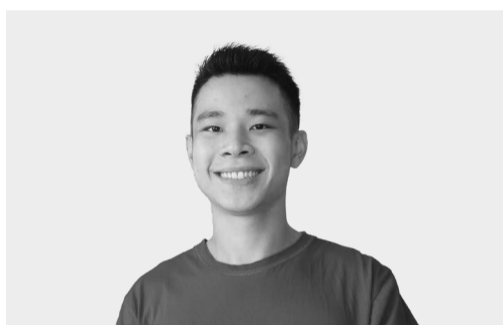


## Personal recommendations are serious matter for gamers

Unlike music or movies, personal recommendations stand out as the most commonly cited way for Indonesian Gen Z to discover new games. This is closely followed by ads and promotional materials, along with browsing the application store as other significant sources of game discovery.



## Most popular gaming influencers



Jess No Limit



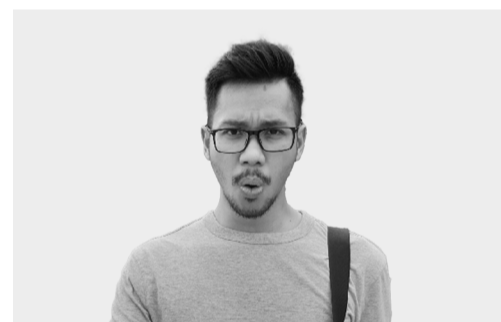
MiawAug



Windah Basudara



Lemon



Bang Alex

## Most Popular Games



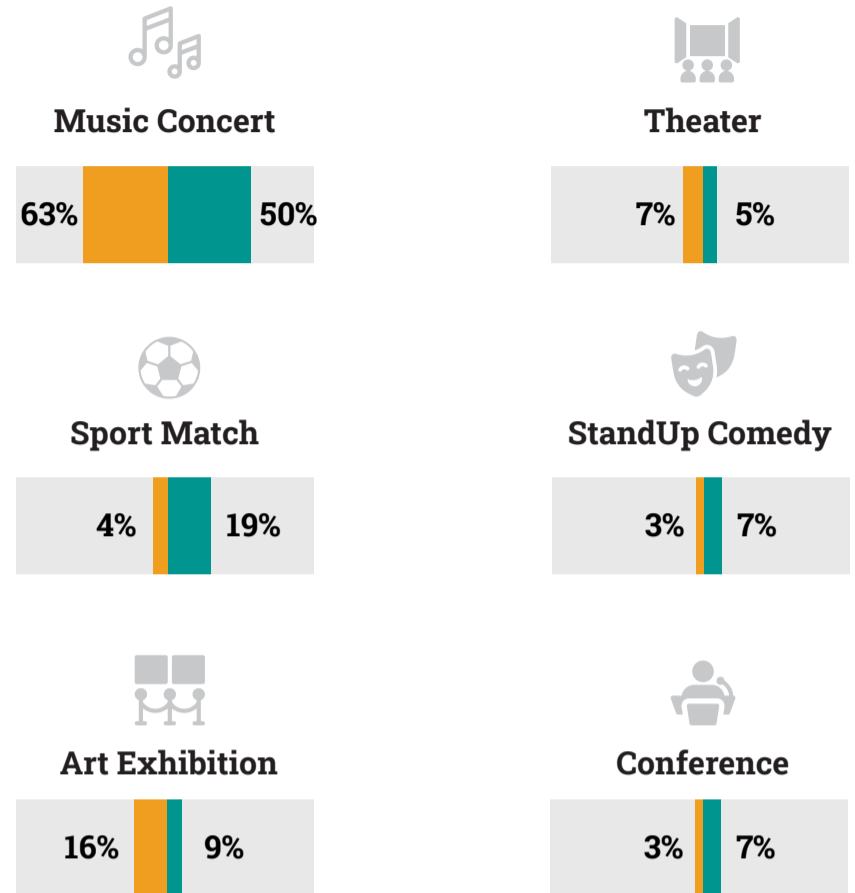


# Live Event Behavior

Female Male

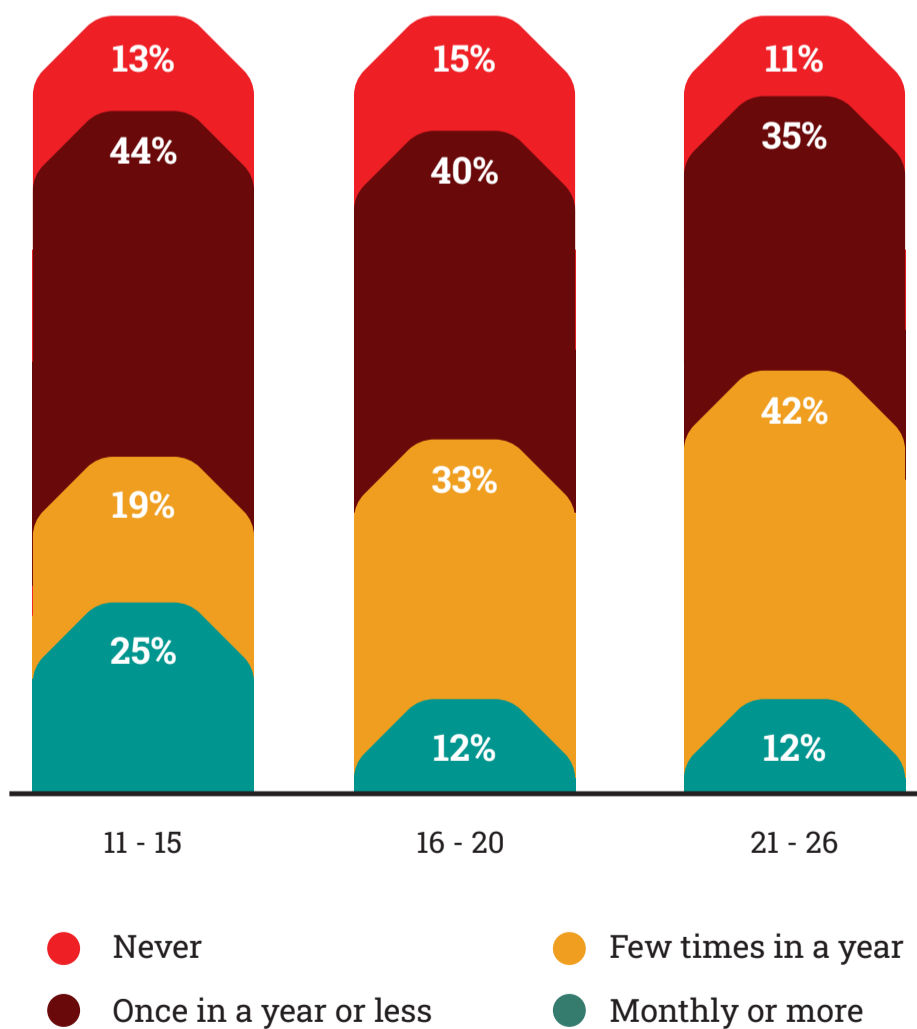
When considering live event attendance, a notable gender disparity emerges, with a larger proportion of males participating, particularly in sports events. However, it's essential to acknowledge that certain events still raise safety concerns for females. This can stem from fears of encountering sexual harassment in public spaces or attending events that run late into the night. The tragic incident at Kanjuruhan serves as a poignant reminder of the risks that can be associated with large gatherings.

Music events, including concerts and music festivals, hold the title as the most popular live events among Indonesian Gen Z. Following closely, the second most favored event for male Gen Z is sports matches, while female Gen Z lean towards art exhibitions. This divergence in preferences doesn't necessarily stem from gender stereotypes, but rather reflects the influence of social environments. Art exhibitions, being predominantly indoors and hosted during daylight hours, offer a safer and more comfortable setting for female attendees.



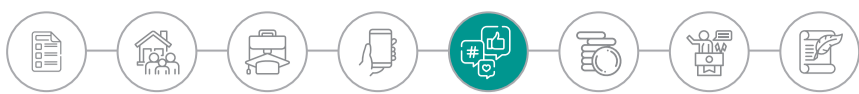
\*The total percentage may not add up to 100% since we are only showcasing the top 6 choices.

## How often do Indonesian Gen Z attend a live event?



The findings from our survey underscore a notable trend: more Gen Z from older age brackets have attended live events compared to the younger ones. This pattern can be attributed to the prevalent ticketed nature of many live events, where attendance often requires a fee. This financial consideration becomes significant, particularly for events with ticket prices that surpass the monthly minimum wage, a scenario often observed in concerts featuring K-pop groups and other high-profile acts. Some events are also held during the weekday and/or at the evening, which becomes a challenge for younger Gen Z who still have to attend school in the morning.

Another contributing factor to the disparity in live event attendance is the geographical concentration of these events in Jakarta. This circumstance necessitates additional expenditures for individuals residing outside the metropolitan area, encompassing costs related to transportation and accommodation. As a result, the more mature Gen Z who have started earning their own money may find it more feasible to cover these supplementary expenses, while younger Gen Z with lower incomes might encounter financial and logistical constraints including lack of permission from their parents that limit their ability to partake in such events.



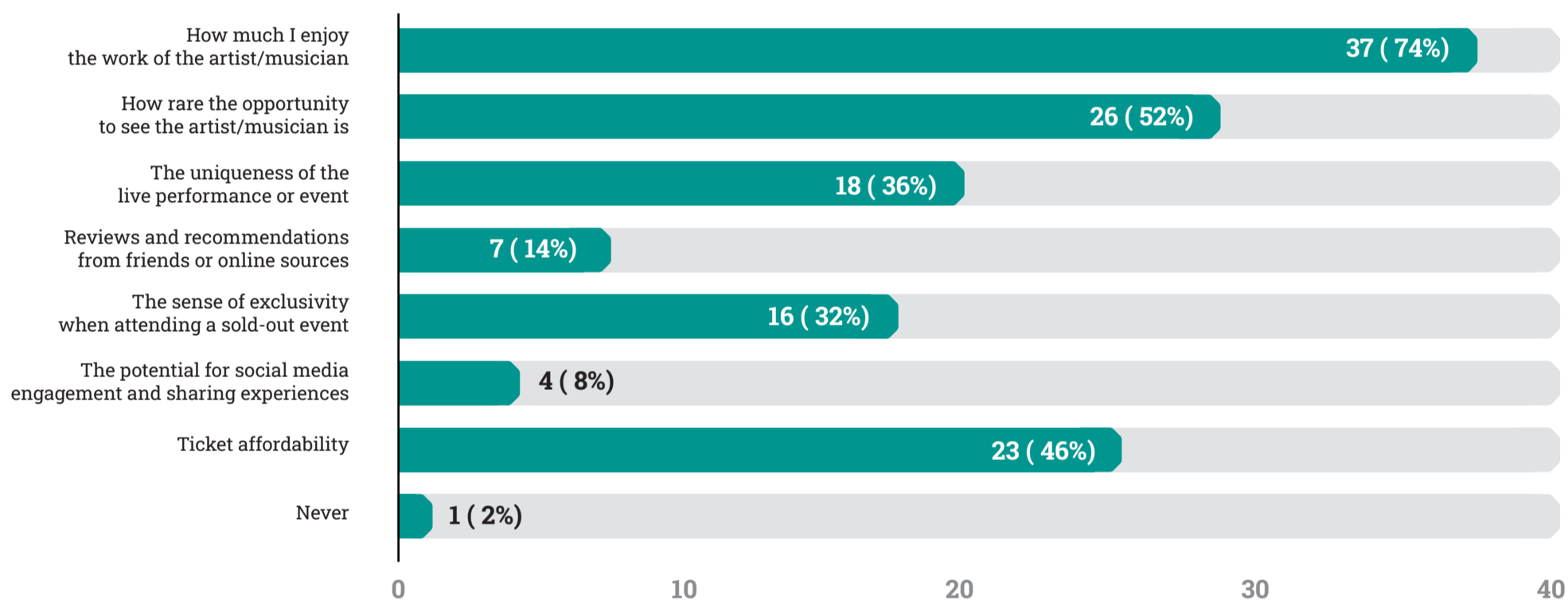
# 'Calo' and Ticket Wars are the new normal in Indonesian live events

The participation of Gen Z in live events, particularly concerts, is relatively limited, and even fewer have experienced the phenomenon of ticket wars.

In our additional survey of 50 Gen Z, 50% stated that they rarely or almost never participate in ticket wars for concerts or music performances. Only 6% mentioned frequently participating, while 16% said they do so often, and 28% indicated they only participate sometimes.

Among the top reasons for engaging in ticket wars were the desire to attend highly popular live events, the excitement of securing tickets before they sell out, the competition for obtaining limited tickets, and even the opportunity to resell tickets for profit. Interestingly, for some Gen Z, the event's popularity and exclusivity are as important as their inherent quality or interest in the event itself, driving them into a frenzy to participate in ticket wars.

## Indonesian Gen Z fight in ticket wars for exclusivity



\*Multiple-response questionnaires allow the total result to exceed 100%.



While not widespread, ticket wars have become a norm within the community of concert-goers. This trend is exemplified by specific instances, such as the queue numbers observed for K-Pop groups or Coldplay concerts in Indonesia, where tickets are highly sought after and competitive. Similarly, events like badminton tournaments have witnessed rapid sell-outs, underlining the enthusiasm and urgency surrounding ticket acquisition.

Several live events have experienced rapid sell-outs within the past year alone, showcasing the immense demand and enthusiasm among Indonesian millennials:



**Pestapora**

**(Music Festival):**

The music festival that brought in 224 musicians, 12 stages and hundreds of thousands of people on September 22-24, 2023, was arguably the largest and most anticipated Indonesian music festival.

**Coldplay**

**(Music Band):**

On May 17, 2023, during the first day of presale, more than 500,000 users participated in a ticket wars to secure their spots.

**BLACKPINK (K-Pop Group):**

Their concert took place at the Main Stadium of Gelora Bung Karno, Jakarta, on March 11-12, 2023. Tickets went on sale starting November 14, 2022, through various payment methods on tiket.com. The anticipation among BLINKs (BLACKPINK's fans) and the Indonesian community was exceptionally high. The ticket wars for BLACKPINK's concert led to tickets being sold out within a mere 15 minutes.

**Indonesia vs.**

**Argentina (Soccer):**

The soccer match also sold out quickly, reflecting the eagerness of Indonesian millennials to attend live sports events.

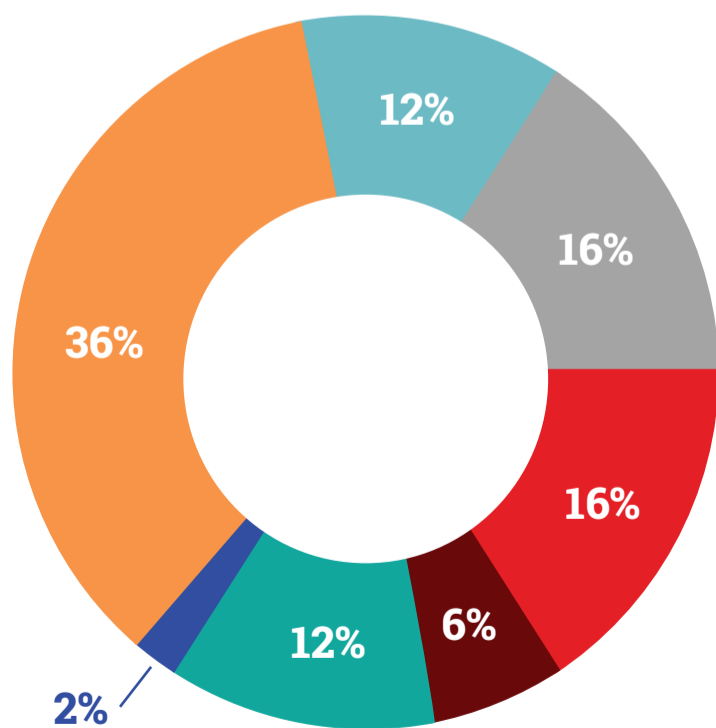
# Travel Behavior

Traveling for vacation has become an affordable luxury for Indonesian Gen Z, as it is both accessible and yet not something everyone can indulge in.

According to an additional survey of 50 Indonesian Gen Z, 68% travel for vacations a few times a year, 12% travel once a year, and the remaining rarely travel. Domestic destinations remain the top choice for the majority of Gen Z in our survey. Additionally, most prefer shorter vacations lasting between 2 to 4 days.

The reasons Indonesian Gen Z budget for travel include a desire to explore new destinations and have unique experiences (44%), saving funds specifically for travel (26%), utilizing their days off or study breaks (16%), and seizing opportunities for special moments such as winter trips or seasonal festivals. Saving money is an important factor to Gen Z's travel budget as they have relatively lower income compared to millennials.

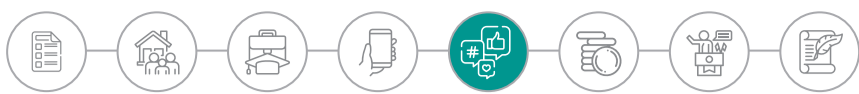
## Indonesian Gen Z: Healing on a budget vacation



Source: IDN Media  
N: 50 responses

### What factors influence your travel destination pick?

- Adventure and unique experiences
- Exploring local culture and authenticity
- Scenic natural landscapes in the area
- Child and elderly-friendly conditions
- Relaxation or 'healing'
- Social media trends and recommendations
- Options depending on the budget

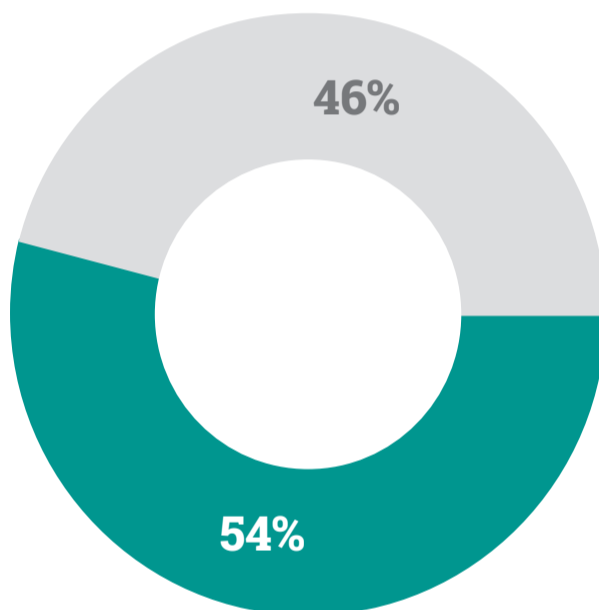


# Gen Z travelers strive to discover not-so hidden gems, but still prioritize ease of access and convenience

82% of Indonesian Gen Z in our additional survey express a willingness to prioritize lesser-known destinations over popular ones. They seek unique experiences offered by these hidden gems (52%), value cultural authenticity (22%), and the chance to explore off the beaten path (20%).

Gen Z firmly believes that tourists should leave a positive impact on local communities. The belief that travel significantly benefits local economies has gained traction, especially in the aftermath of the COVID-19 pandemic. During this time, well-known destinations such as Bali and Yogyakarta saw a decline in visitors, leaving locals grappling with a significant loss of income.

Nevertheless, certain factors can still draw Indonesian Gen Z to well-known locations. For example, 78% of our respondents mention a preference for popular or crowded places due to the convenience of access and the availability of public transportation. Recommendations from friends and family, along with online reviews, also play a substantial role in Gen Z's decision-making, creating a reinforcing cycle of popularity. 74% of respondents in our survey even admit that they frequently visit a place that is popular on social media and 54% say that they might pick a destination solely based on an influencer's recommendation.

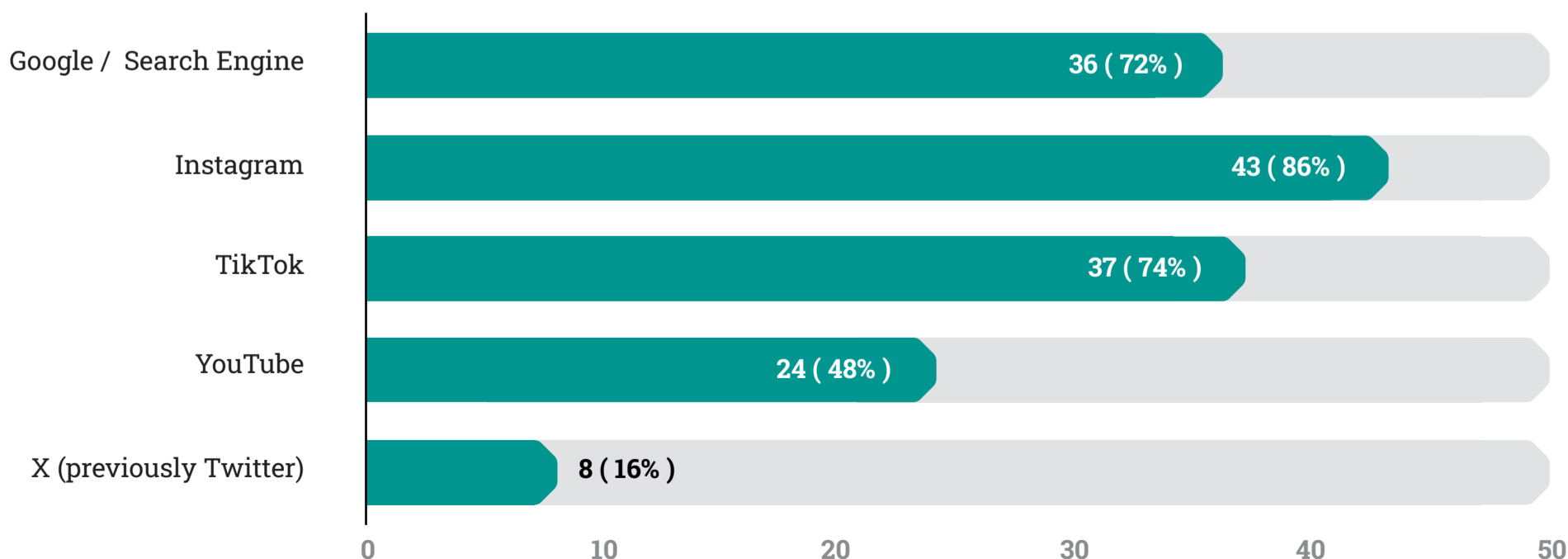


## Have you picked a destination based on reviews from social media?

- Yes
- Yes, but it's not the sole reason

## Travel begins on Instagram, Search Engine, and YouTube... for research purposes

As Indonesian Gen Z use Instagram, TikTok, and search engines to research their travel destinations, they may encounter more popular tourist spots or, at the very least, come across destinations that are often referred to as "hidden gems," even though these places may not be quite as hidden as they seem.



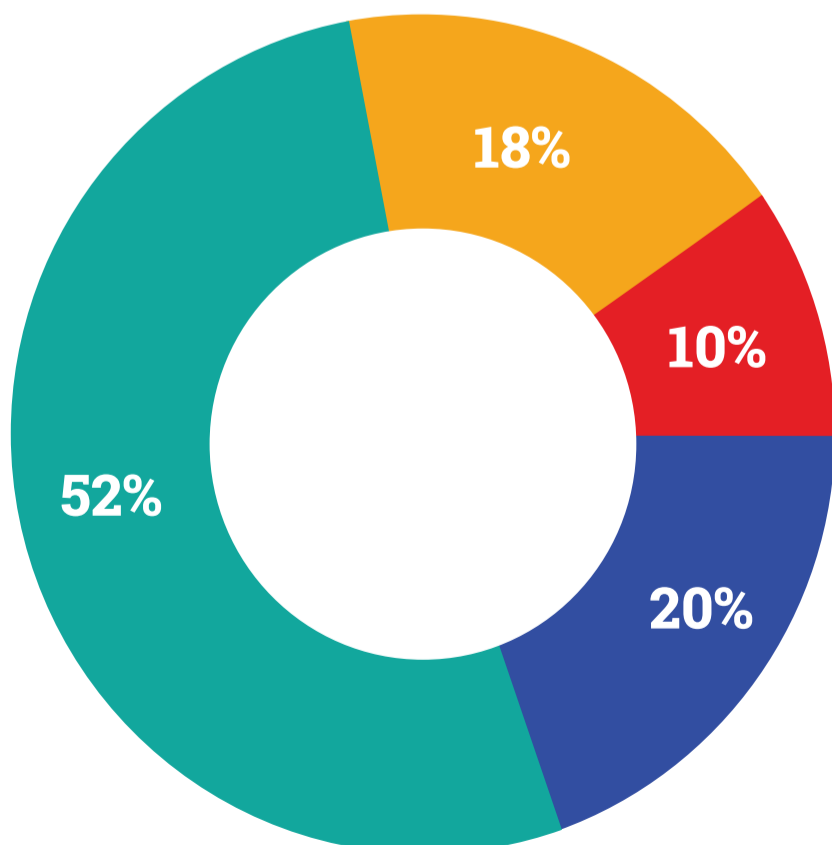
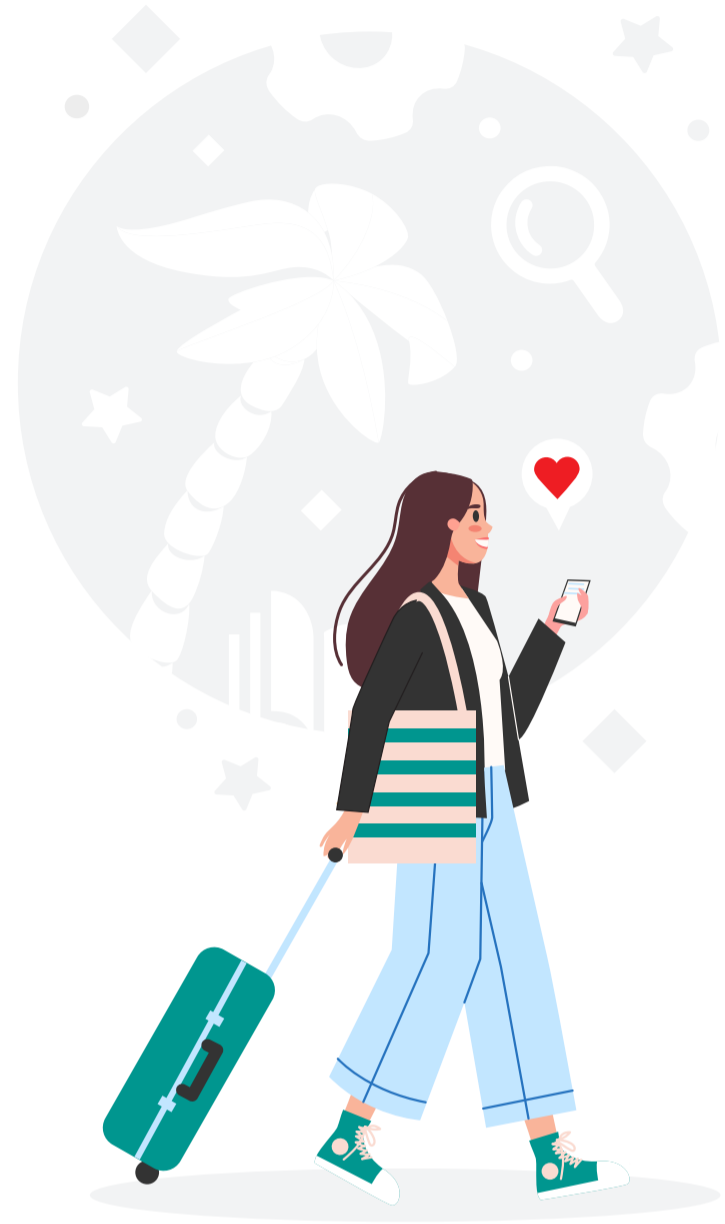
\*Multiple-response questionnaires allow the total result to exceed 100%.

## Indonesian Gen Z travel for 'healing' and exploring hidden gems, local cuisines

As Indonesia boasts an array of unique traditional foods, distinct to each region of the country, it's unsurprising that Indonesian Gen Z consider culinary experiences to be an essential aspect of their travels.

22% of our respondents indicate that they have planned their vacations specifically around culinary experiences. 46% prioritize culinary experiences while also considering other factors. 32% say they don't consider culinary experiences a priority but still want to try local food.

An impressive 76% of our respondents incorporate culinary experiences into their travel itineraries, underscoring their commitment to exploring local cuisine. Moreover, a significant 86% of Indonesian Gen Z express that they have cherished memories of the food they've encountered during their travels, highlighting the special place that culinary experiences hold as an integral part of their travel journeys.



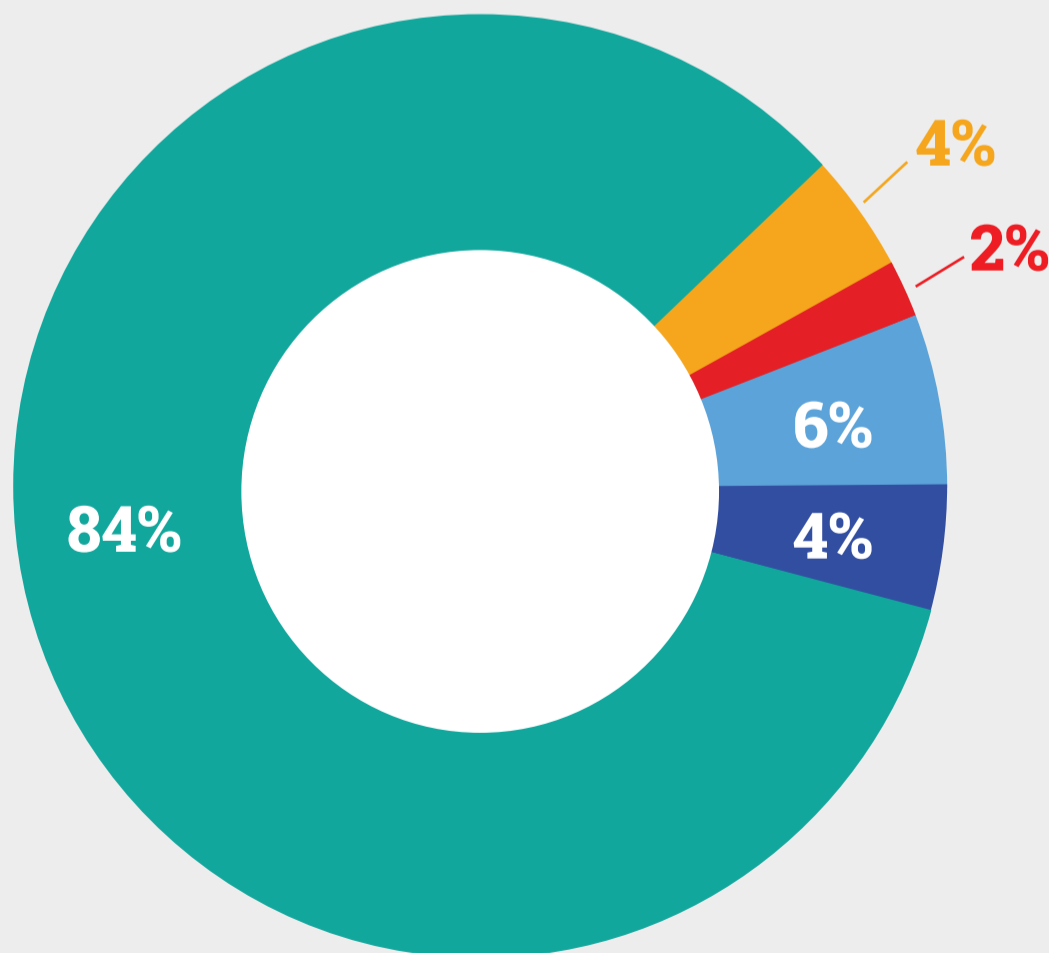
### Do you have special budget for culinary experience?

- Certainly, culinary experiences are my primary goal
- Depending on the reputation and related reviews of the place
- I tend to budget less for culinary tourism and allocate more to other activities
- I do not consider culinary tourism a priority in my travel budget

## Getting away from hustle and bustle to heal

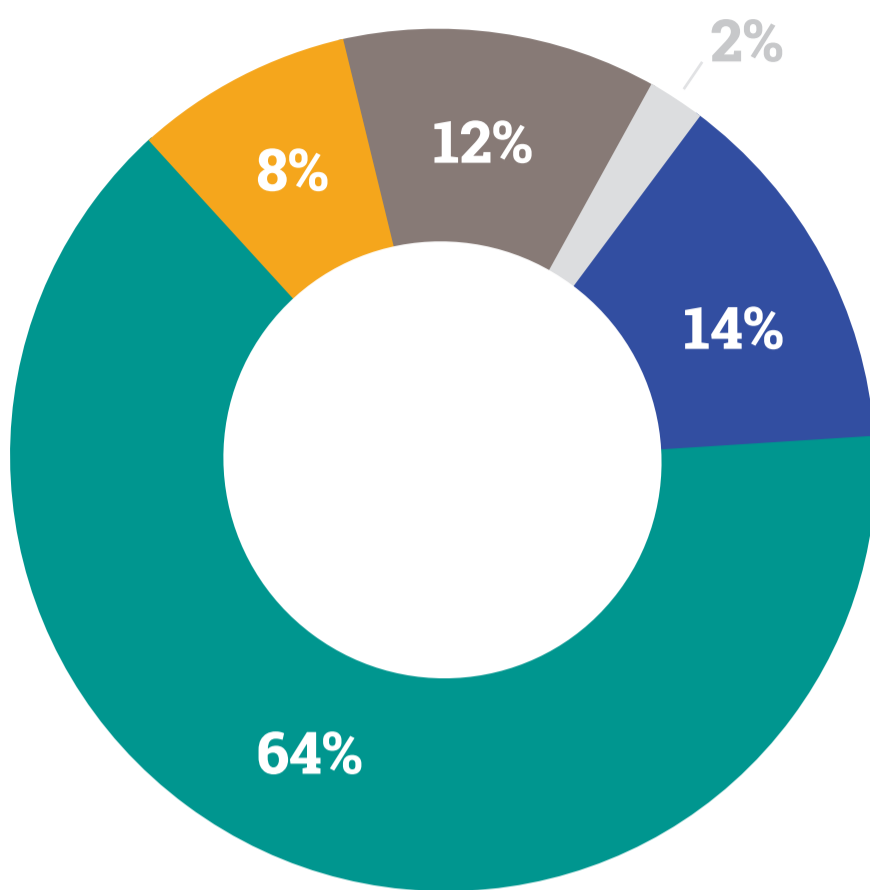
90% of Indonesian Gen Z in our survey view travel as a healing experience, a respite from the demands of their fast-paced lives. The opportunity to explore new places, cultures, and cuisines allows them to rejuvenate and recharge their spirits.

Travel provides a break from daily routines, offering moments of relaxation and reflection amid breathtaking landscapes and enriching encounters with local communities. Gen Z see it as a chance to disconnect from the digital world, reconnect with nature, and foster personal growth. This perception of travel as a healing journey aligns with their desire for holistic well-being, combining adventure, self-discovery, and cultural immersion to nourish their minds and souls.



### What counts as a “healing” travel destination for Indonesian Gen Z?

- Accommodation that provides spa and health treatment
- Quiet and beautiful natural landscape
- Spiritual or holy places
- Destination with yoga and meditation places
- Places where you can be connected to local culture and tradition



## What activities interest Indonesian Gen Z the most during traveling?

- Exploring bustling cities and urban environments
- Immersing themselves in nature and outdoor activities
- Experiencing cultural and historical sights
- Relaxing on tranquil beaches or at spa resorts
- Engaging in volunteer or community-based trips

It's worth mentioning that Indonesian Gen Z displays a stronger preference for natural landscapes over destinations that focus on well-being activities such as yoga or spa treatments. Merely 40% of Gen Z individuals have opted for places offering these services, while 30% express curiosity but have not yet given them a try, and the remaining 30% do not consider them at all. This inclination could potentially be linked to their budget constraints, as natural landscapes tend to be a more cost-effective option compared to spa treatments.

On the other hand, a significant 70% prioritize having relaxing accommodations, while 30% are indifferent to this aspect. This preference might be related to Gen Z's consideration of budget as a crucial factor in their travels, where accommodation costs often represent a substantial portion of their overall expenses.



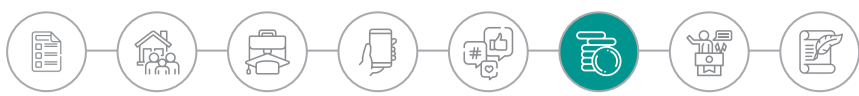




Chapter 5

# Finance and Shopping Behavior





# Financial Preferences



## Indonesian Gen Z are earning less than Rp 2.5 million per month, thus having lower purchasing power compared to millennials

The findings of our survey reveal a notable disparity in the monthly income of Gen Z. **A significant 56% of respondents indicated that their monthly income is below Rp 2.5 million.** Meanwhile, 26% reported an income ranging from Rp 2.5 million to Rp 5 million per month. A smaller 14% stated their income to be between Rp 5 million and Rp 20 million monthly. Additionally, 3% mentioned their income falling within the range of Rp 10 million to Rp 30 million per month. Merely 1% stated that their monthly income surpasses Rp 100 million. These statistics highlight the diverse income brackets that Indonesian Gen Z occupy, underscoring the financial spectrum within this generation.

According to data from Statistics Indonesia, the average monthly income for Indonesians employed in the formal sector varies depending on the industry, ranging from Rp 1,841,081 (various service activities) to Rp 5,180,248 (financial and insurance). On average, individuals employed in the formal sector earn Rp 3,070,756 per month.

It's important to note that the Statistics Indonesia report lacks a category specifically addressing income by generation, therefore the writers decide to show age groups which overlap with the age of Gen Z in this report (11-26 years old).

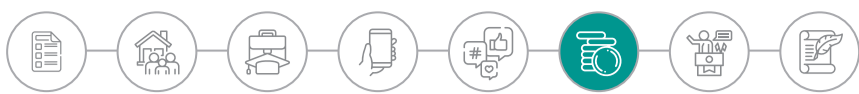
| Age Group                                | Monthly income from formal sector |
|--|-----------------------------------|
| 15 - 24 year old (Gen Z)                 | Rp 1,700,025                      |
| 25 - 29 year old (Gen Z and Millennials) | Rp 2,773,639                      |
| 30 - 34 year old (Millennials)           | Rp 3,200,328                      |
| 35 - 39 year old (Millennials)           | Rp 3,360,450                      |
| 40 - 44 year old (Millennials)           | Rp 3,440,010                      |

Source: Statistics Indonesia

For Indonesians aged 25 to 54 working in the informal sector, the monthly income averages Rp 2,007,345—reflecting the higher productivity typical of this age range. Meanwhile, Indonesians aged 15-24 earn Rp 1,555,374 per month, while those aged 55 and above earn Rp 1,566,025 monthly. These figures shed light on the varying income dynamics among different age groups and sectors within Indonesia.

The monthly income of Indonesians is heavily contingent on their geographic location, given that each province and municipality determines its own minimum wage. This variation in minimum wages is reflected in the income disparities across regions. For instance, Jakarta boasts the highest minimum wage at Rp 4.9 million per month, while Central Java has the lowest at Rp 1.9 million per month. This regional wage diversity accounts for the significant proportion of Indonesian Gen Z living on a monthly income below Rp 2.5 million. The differing economic conditions and cost of living across provinces contribute to the notable income discrepancies observed among Gen Z in different areas of the country.





# Majority of Indonesian Gen Z spend their income on basic necessity, leaving little for health, self-development, and recreation

In September 2022, Statistics Indonesia reported that the average Indonesian spent Rp 1.39 million per month, marking an 8.71% increase from the previous year. Nearly half of this expenditure, amounting to Rp 700,966, was allocated towards ready-to-consume food and beverages, excluding raw ingredients, vegetables, and staples like rice.

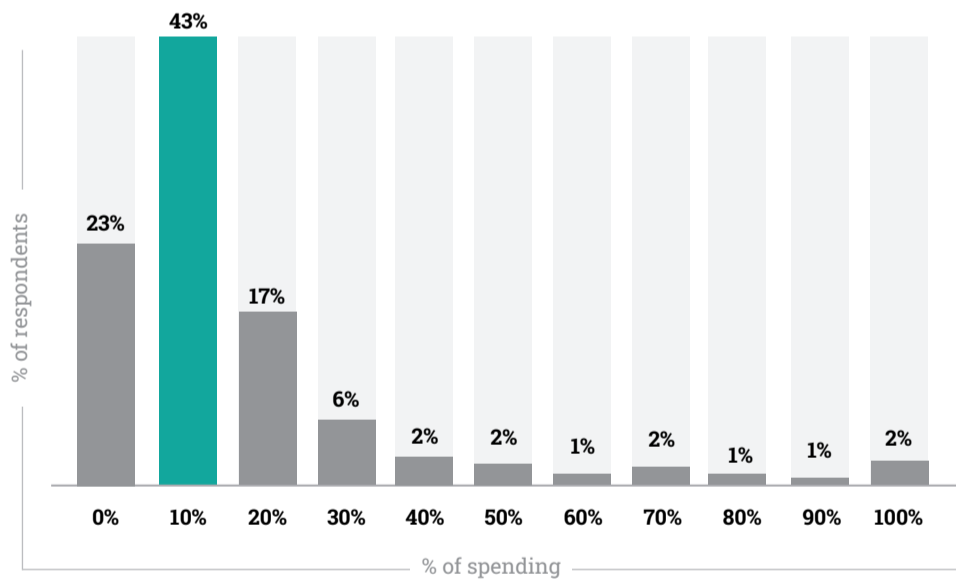
Individually, the monthly per capita spending on cigarettes reached Rp 82,180. This value constitutes 12.5% of the total per capita monthly expenditures.

As a result, the consumption expenditure on cigarettes surpasses that of other commodity groups. For instance, the expenditure on staples like rice stood at Rp 71,440 per capita per month, while spending on fish/shrimp/squid/clams totaled Rp 56,330 per capita per month. This comparison

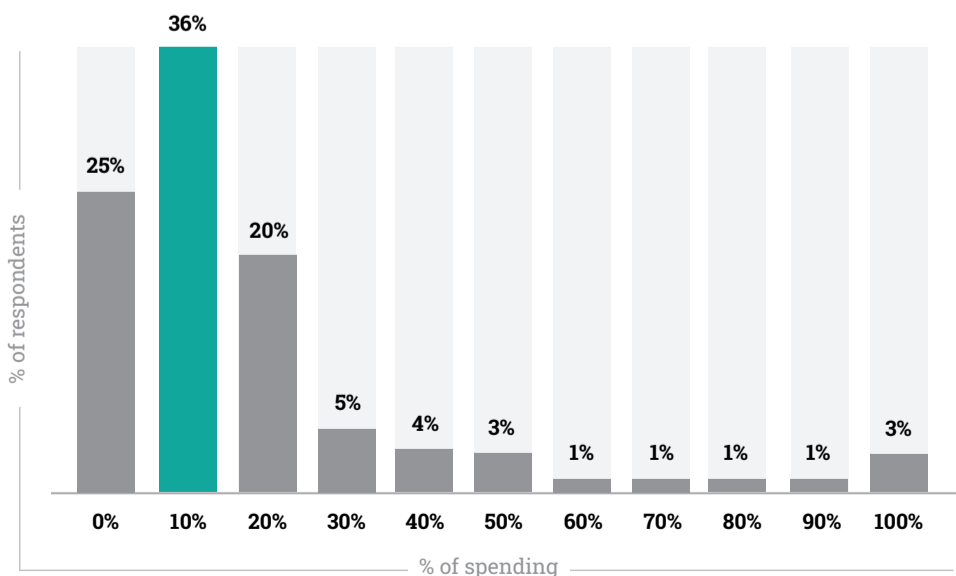
underscores the relatively higher spending on cigarette consumption, reflecting a significant portion of individuals' monthly expenses.

The substantial allocation of funds towards food and groceries leaves a limited budget for various other categories, such as entertainment, recreation, education, and self-improvement. A striking 43% of Gen Z in our survey expressed that they allocate less than 10% of their income for health and insurance expenses, while a significant 23% indicated that they do not allocate any funds for this purpose. This underscores the challenge of balancing financial priorities and underscores the impact of expenditure patterns on other essential aspects of individuals' lives, such as health and future security.

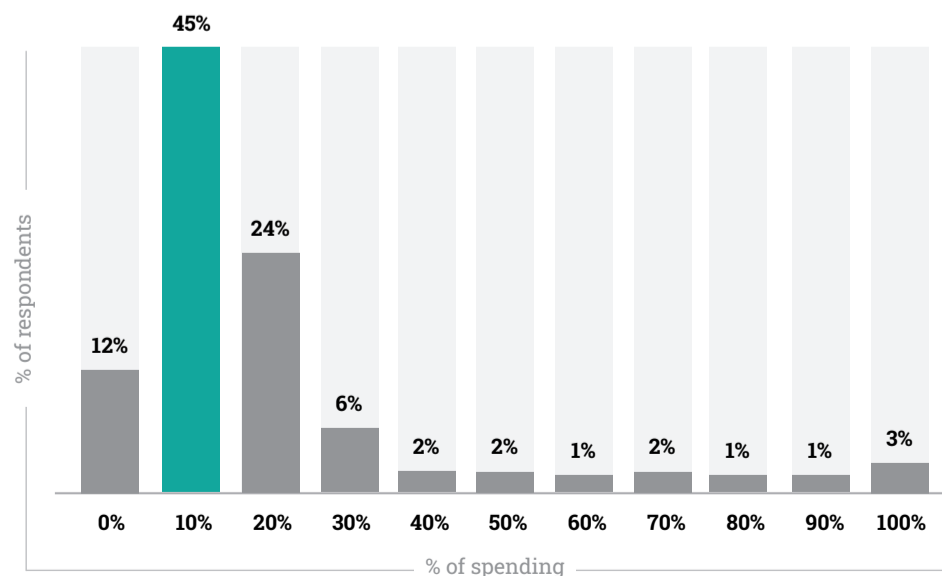
## Health and Insurance



## Education and Self-Development



## Entertainment and Recreation



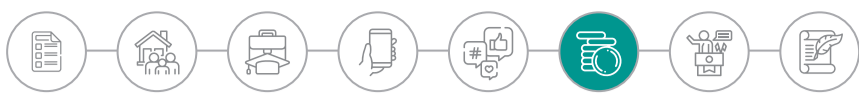
# Gen Z are saving up for their own education, becoming entrepreneurs and buying houses

Among Generation Z, the top financial priority is homeownership, followed closely by investments. Notably, there's a significant shift towards entrepreneurial pursuits, with other priorities including starting a business and saving for education. This trend reflects Gen Z's recognition of the importance of higher education in enhancing career prospects, given the challenges posed by the post-pandemic job market and evolving technological landscape.

Despite occasional stereotypes of impulsive spending, our survey reveals that paying off debt and traveling are not as common as financial goals for Gen Z. This suggests that they may not be as indulgent as some portray them on social media, demonstrating a more pragmatic and forward-thinking approach to their financial future.



| Age Group            | 11-15 | 16-20 | 21-26 |
|----------------------|-------|-------|-------|
| Paying Debts         | 6%    | 6%    | 11%   |
| Buying House         | 0%    | 19%   | 29%   |
| Starting a Business  | 19%   | 18%   | 16%   |
| Investment           | 6%    | 26%   | 23%   |
| Saving For Education | 50%   | 20%   | 14%   |
| Traveling            | 13%   | 11%   | 6%    |



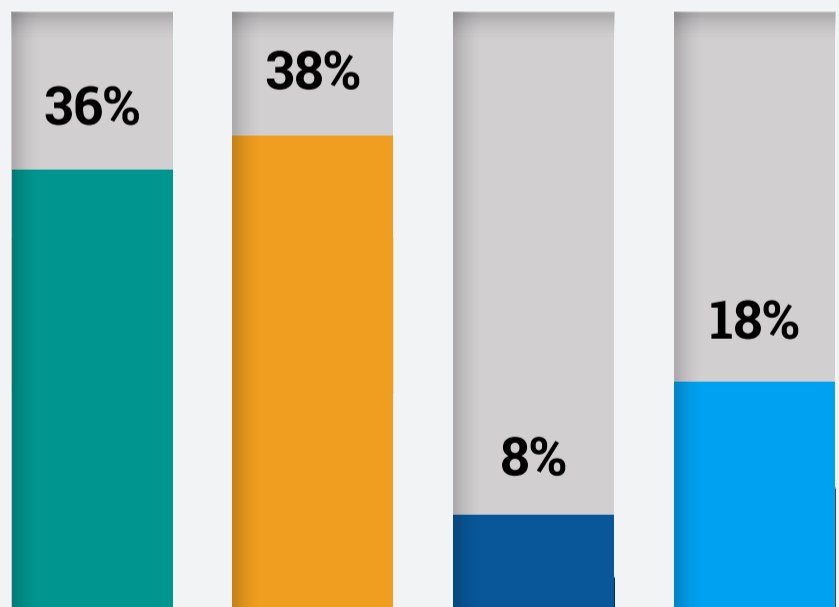
Indonesian Gen Z are displaying an enhanced acumen in their approach to financial planning. In our survey, 41% of Gen Z affirmed that they regularly construct monthly budgets and diligently adhere to them. Another 26% disclosed that they apportion a portion of their income for savings and investment purposes. Additionally, 21% indicated that they actively seek supplementary sources of income, while 2% have even sought counsel from financial planners or other experts.

A mere 4% rely solely on chance for their financial outcomes, whereas 6% expressed uncertainty regarding their financial planning.

This heightened awareness of financial planning could stem from the escalating social inequality, which impels individuals to adopt a more cautious stance in safeguarding their economic well-being. This shift reflects a proactive response by Gen Z, as they navigate a landscape where financial stability and preparedness are increasingly recognized as indispensable tools for combating disparities and securing a more resilient future.

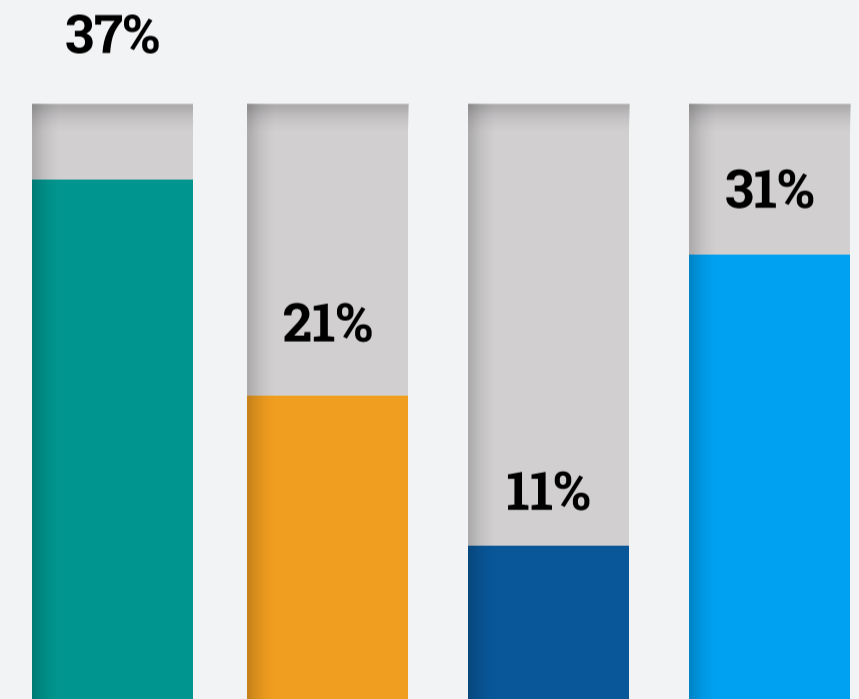
The findings from our survey reveal a significant level of financial preparedness among Indonesian Gen Z. Almost three in four Gen Z, accounting for 74%, have taken the proactive step of establishing an emergency fund to handle unexpected situations. Additionally, a substantial 58% have ventured into investment activities, showcasing a robust engagement in pursuing financial growth and security.

### Do you have an emergency fund?



- Yes, I have a sufficient emergency fund
- I have an emergency fund, but still not sufficient enough
- I haven't thought of preparing an emergency fund
- No, I haven't had an emergency fund

### Have you started investing to reach your financial goals?



- Yes, I have started an investment to help me achieve my financial goals
- I have just started investing and I have yet to decide my financial goals
- I am not sure whether investing is the right choice for me
- No, I haven't started an investment



These statistics reflect the prudent financial behavior of Indonesian Gen Z, as they recognize the importance of both safeguarding against unforeseen circumstances and leveraging opportunities for long-term financial prosperity.

We interviewed frugal living practitioner and content creator Samuel Ray to gain insight into his perspective on the finances of Indonesian Gen Z. Together with his wife Claudya Abednego, he provided valuable tips for Indonesian millennials and Gen Z individuals who are just embarking on their personal finance journey. By practicing frugal living, focusing on increasing their income, and making smart investments, Samuel and Claudia achieved financial independence by the age of 33.

While frugal living is often a necessity for many Indonesians who struggle to make ends meet, Samuel emphasized that achieving financial independence involves three key factors:



### Frugal Living

“This can be taught and is the easiest to implement for everyone, but it requires discipline. Frugal living does not mean that we have to suffer and deprive ourselves of enjoying life, but rather having priorities and not living beyond our means.”



### Increasing Income

“This depends on one’s creativity and opportunities, as well as luck. Besides climbing up the career ladder, one can also increase their income by taking up freelance work or part-time jobs. Networking and continuous upskilling are required to be able to stay relevant in the job market.”



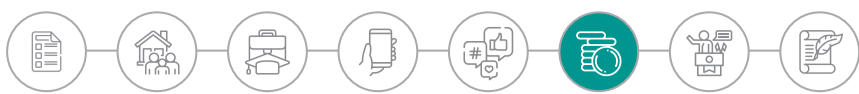
### Investments

“In Indonesia, some tend to seek quick profits, but in reality, it is a means to protect our money from inflation. It doesn’t have to be risky or complicated. Investment can be as simple as saving our money in short-term deposits or mutual funds, which are arguably more stable and low-risk compared to investing in stocks.”



**“Frugal living is a straightforward concept that often receives less attention from financial content creators. Not everyone aspires to be an entrepreneur, and not everyone has the necessary resources for it, but frugal living is an achievable and practical approach that can benefit everyone.”**

- **Samuel Ray**  
Frugal Living Practitioner and Content Creator



## Gen Z are looking for starter home of less than 100 sqm considering limited budget



Homeownership holds paramount significance for Indonesian Gen Z, representing a milestone of financial stability and a long-term investment. With the rising property prices, the dream of owning a home poses both a substantial financial goal and a symbol of achieving personal and familial security. As more Gen Z prioritize homeownership, it reflects their aspirations for a stable future in a rapidly evolving economic landscape.

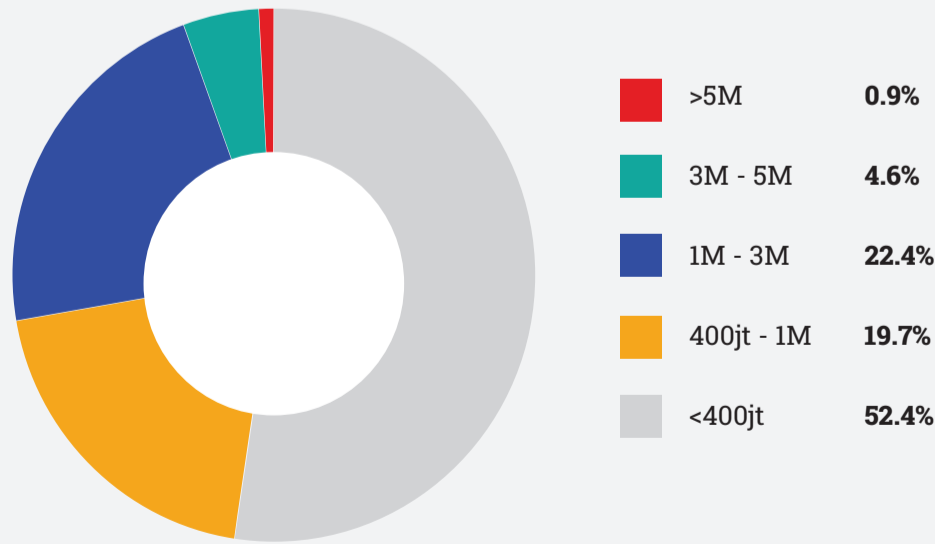
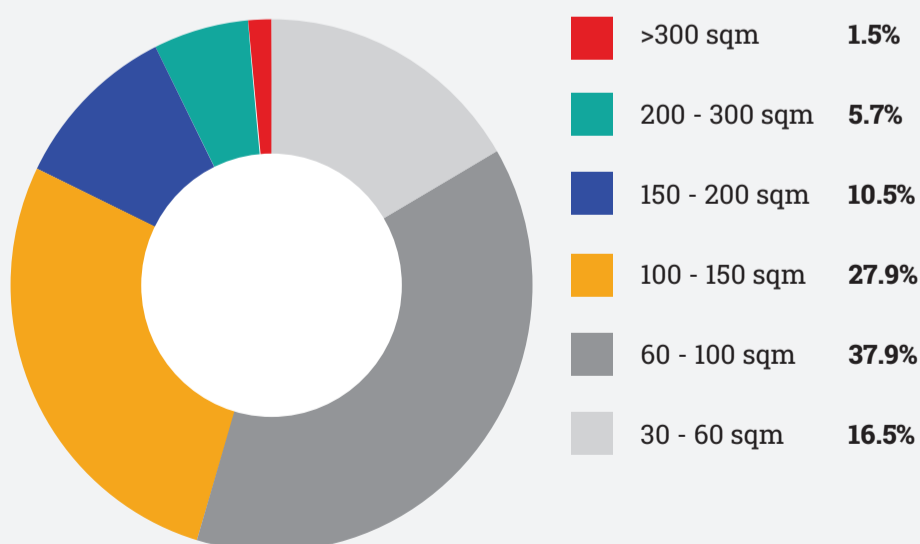
IDN Media collaborated with 99 Group, Southeast Asia's fastest-growing property platform, to gather insights and data regarding property trends among millennials and Gen Z. The data, collected from January 2022 to June 2023, indicates that more millennials are actively searching for properties compared to Gen Z.

According to the findings from 99 Group, Gen Z showed a strong preference for landed houses when searching for properties, with 64.4% favoring this type of property.

This is followed by 13.6% who prefer land, 9% who prefer apartments, and 8.8% who prefer shophouses. The most sought-after locations among Gen Z are major cities in Indonesia, with Jakarta leading at 57.1%, followed by Bandung at 14.2%, and Surabaya at 11.6%.

When it comes to property size, half of Gen Z are looking for properties with less than 100 square meters. Additionally, half of Gen Z prefer properties priced below Rp 400 million and 19.7% prefer properties priced between Rp 400 million to 1 billion. This is different than millennials' price preference, which is a bit higher with 35.7% Rp 1-3 billion, 32.3% between Rp 400 million--1 billion, and 25% priced below Rp 400 million.

## Gen Z are looking for property under Rp 400 million and less than 100 sqm



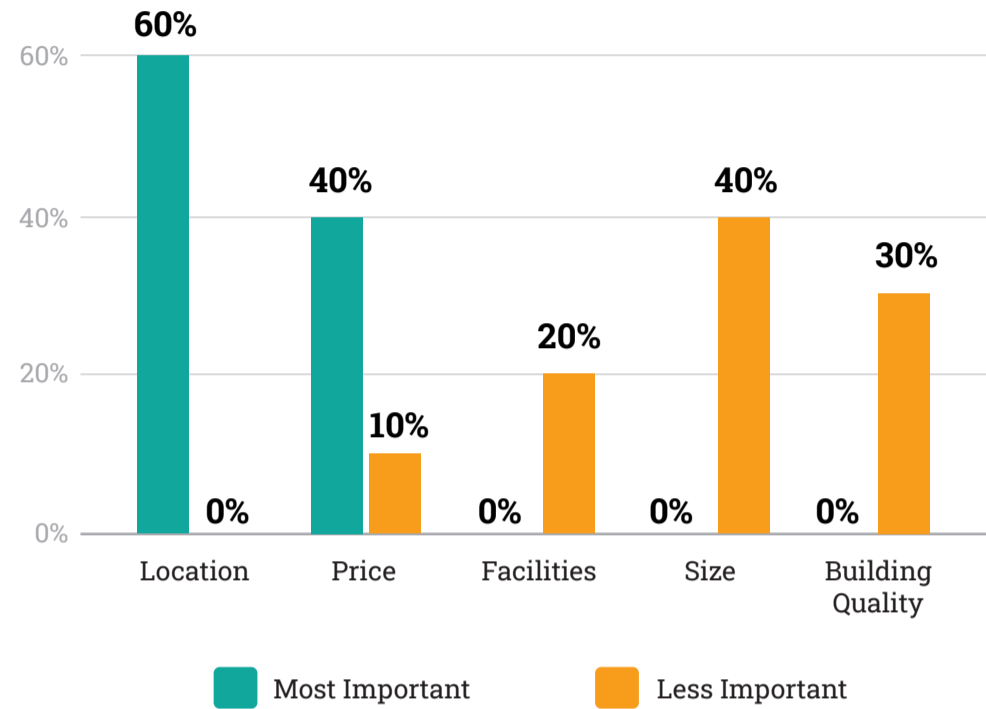


Gen Z are relatively flexible regarding the condition of the building, whether it's new or secondary.

While the majority of Gen Z intend to purchase property for residential purposes (66.7%), financial motivations also play a significant role. About 16.7% of Gen Z view property as an investment, followed by 16.7% who seek property as an agent or co-broker.

In summary, the data from 99 Group suggests that Gen Z currently possess smaller purchasing power and are inclined to consider properties with lower price tags compared to millennials. This may be attributed to the financial stability typically associated with older generations, considering that Gen Z are still starting their journey to adulthood with little to no income. Among the Gen Z surveyed, 98.8% opted for mortgage payments (KPA/KPR) and 1.2% preferred installment methods.

## The key factors influencing Gen Z's property choices are location and price



## Gen Z are using digital platform to look for properties

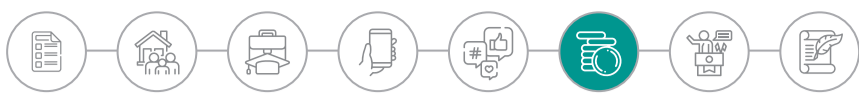


|                                     |       |
|-------------------------------------|-------|
| Website / Property App (E-commerce) | 38.5% |
| Agent                               | 15.4% |
| Social Media                        | 23.1% |
| Friends / Family                    | 15.4% |
| Newspaper / Magazine                | 7.7%  |

As per 99 Group's Flash Report Resale Price Index, property prices in Indonesia have exhibited an upward trend since January 2020. Overall, between January 2020 and July 2023, the Indonesia Resale Price Index registered a notable 10.5% increase. While this general trend was observed, specific cities displayed varying degrees of growth. Cities such as Medan experienced a substantial increase of 18.5%, followed by Bekasi at 15.6%, and Tangerang at 14.9%. Conversely, some cities recorded more modest growth rates, including Surakarta at 3.5%, Denpasar at 4.3%, and Surabaya at 5.3%. These disparities in growth rates reflect the diverse dynamics of the Indonesian property market across different regions and urban centers.

In the first half of 2023, the cities boasting the highest median property prices are primarily situated within DKI Jakarta. Specifically, these cities include Jakarta Pusat (Central Jakarta) with a median price of Rp6.5 billion, Jakarta Utara (North Jakarta) at Rp4.3 billion, Jakarta Selatan (South Jakarta) with Rp3.4 billion, and Jakarta Barat (West Jakarta) at Rp2.5 billion. Apart from Jakarta, Surabaya also stands out with a median price of Rp2.5 billion.

Both Jakarta and Surabaya are integral components of Indonesia's megapolitan cities, specifically Jabodetabek (comprising Jakarta, Bogor, Depok, Tangerang, and Bekasi) and Gerbangkertosusila (encompassing Gresik, Bangkalan, Mojokerto, Surabaya, Sidoarjo, and Lamongan). These cities are among the largest in Indonesia, characterized by dense populations and vibrant economic activities. They benefit from robust infrastructure and comprehensive amenities, factors that contribute to their status as cities with the highest median property prices, as per data provided by 99 Group.



# Shopping Behavior

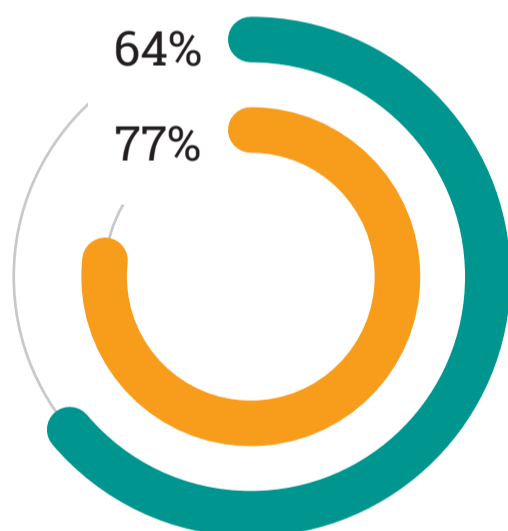


## Price and promotions are key drivers for Indonesian Gen Z to shop online

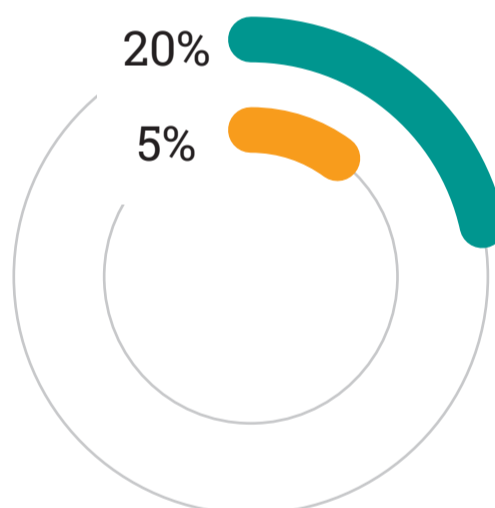
The realm of online shopping in Indonesia has witnessed significant acceleration through e-commerce websites and social commerce platforms, particularly since the outbreak of the COVID-19 pandemic. A notable 72% of Gen Z surveyed express their preference for online shopping on Shopee, with homegrown e-commerce platform Tokopedia closely following at 12% and then TikTok Shop at 11%. Interestingly, the demographic breakdown reveals that Shopee garners greater engagement from females, while Tokopedia is favored by men. This dynamic highlights how each platform caters to distinct needs and offers varied products and services.

■ Male ■ Female

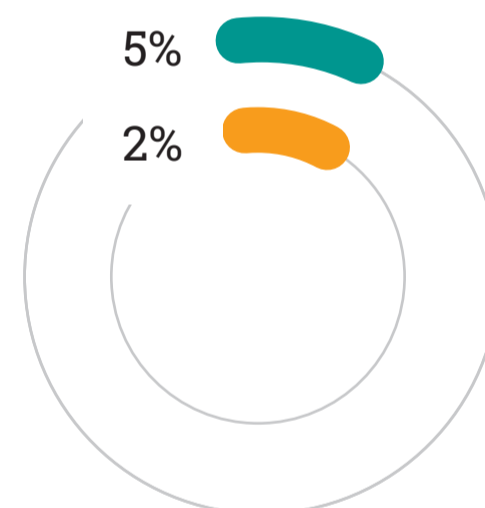
### Shopee



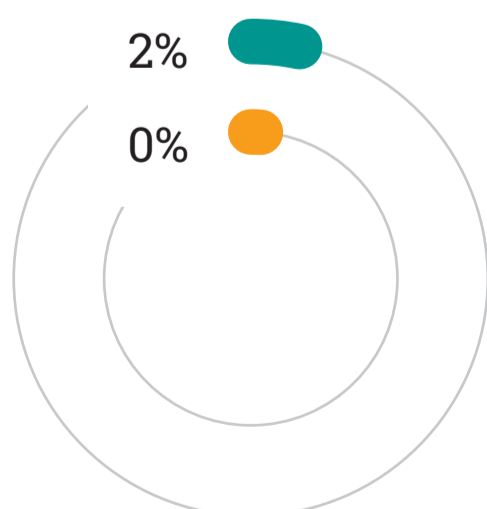
### Tokopedia



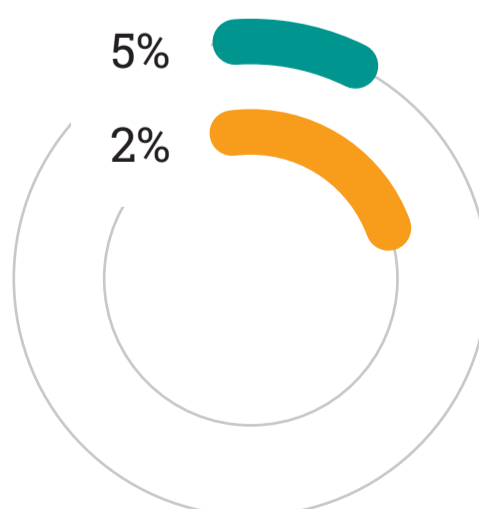
### Lazada



### Bukalapak



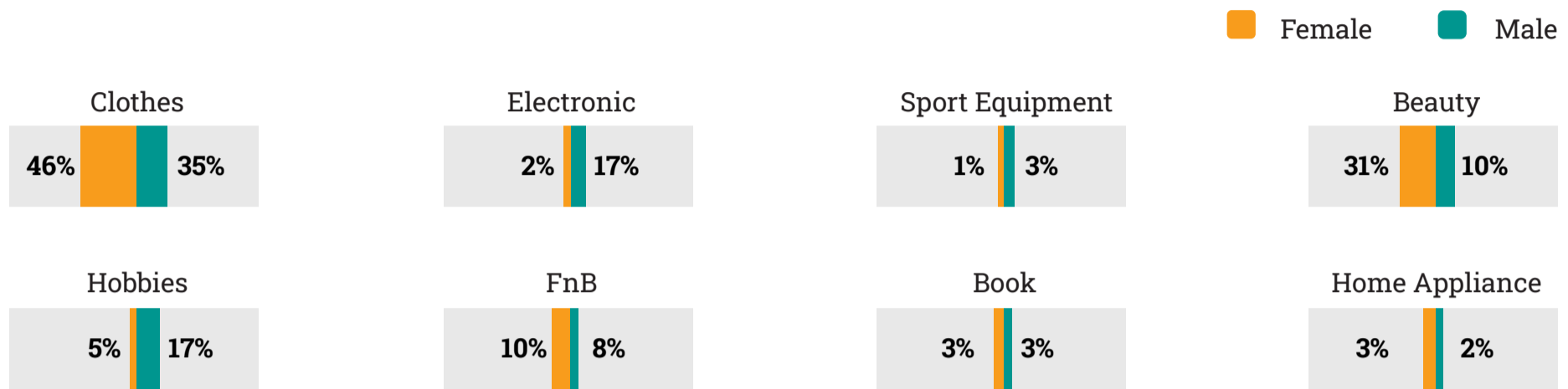
### TikTok Shop



\*The total percentage may not add up to 100% since we are only showcasing the top 5 choices.  
 \*The survey was conducted prior to the ban on TikTok Shop in early October 2023.

Within the realm of online shopping, distinct preferences emerge between female and male Gen Z. Female Gen Z tend to gravitate towards purchasing clothing and beauty products, reflecting a focus on personal appearance and self-expression. On the other hand, male Gen Z exhibit a proclivity for acquiring hobbies-related goods and electronics, showcasing an interest in recreational pursuits

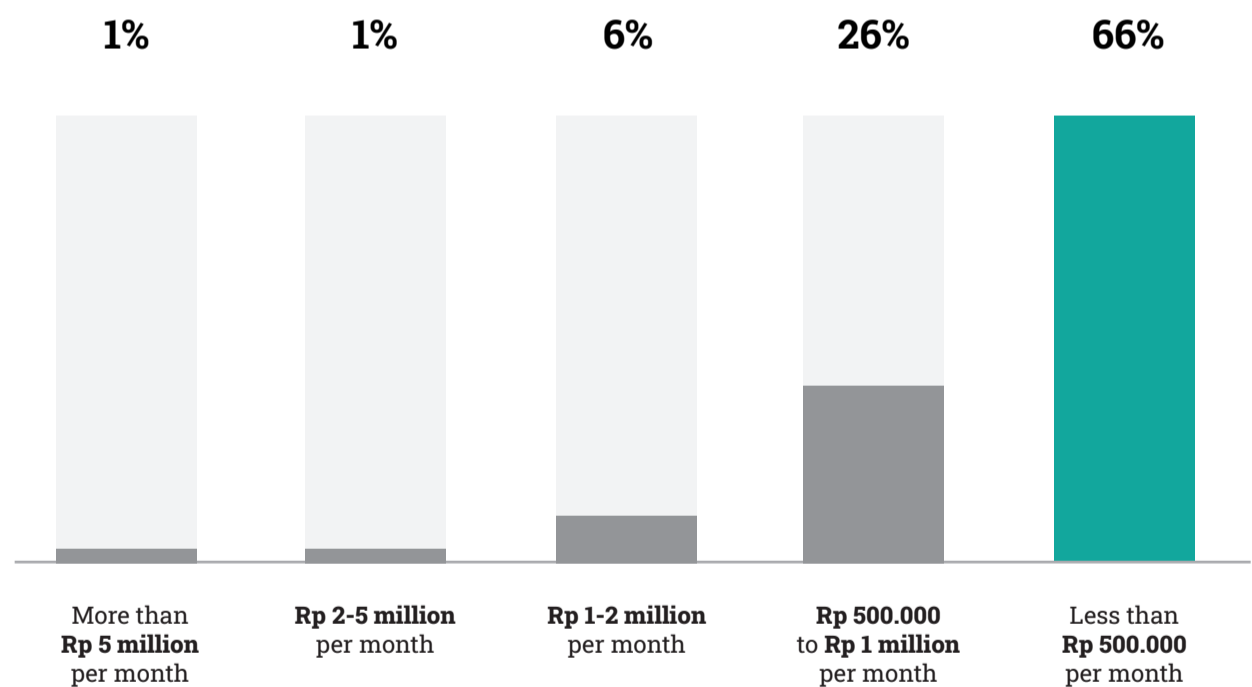
and technological gadgets. This gender-based divergence in online shopping preferences underscores the diverse array of interests and needs that shape consumer behavior among Gen Z, contributing to the variety of goods and services available within the e-commerce market.



\*The total percentage may not add up to 100% since we are only showcasing the top 8 choices.

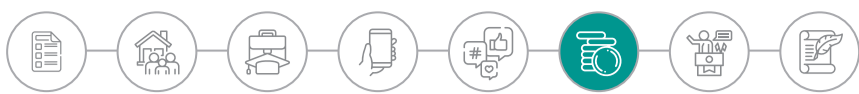
Regardless of gender, both male and female Gen Z indicate a common spending trend, with the majority reporting expenditures of less than Rp 500,000 per month for their online shopping endeavors. This data underscores the popularity of e-commerce among Indonesian Gen Z, as well as their prudent financial approach to online purchases within a certain budget threshold.

### Gen Z are budget-conscious shoppers



The insights gleaned from our survey, including platform preferences and budget considerations, suggest a prevailing prioritization of budget among Indonesian shoppers. This orientation towards cost-effectiveness is evident in their attraction to discounts, promotions, and free shipping offers—particularly significant given Indonesia’s archipelagic nature, which can lead to higher shipping costs. This financial mindfulness is reflected in the emergence of platforms like TikTok Shop, which

capitalizes on the trend by providing substantial discounts and promotions without levying platform fees. This exemplifies the pronounced sensitivity of Indonesian Gen Z to pricing dynamics when engaging in shopping activities. The prominence of budget-conscious behavior further underscores the critical role that pricing strategies and cost-related factors play in shaping consumer decisions within the Indonesian e-commerce landscape.

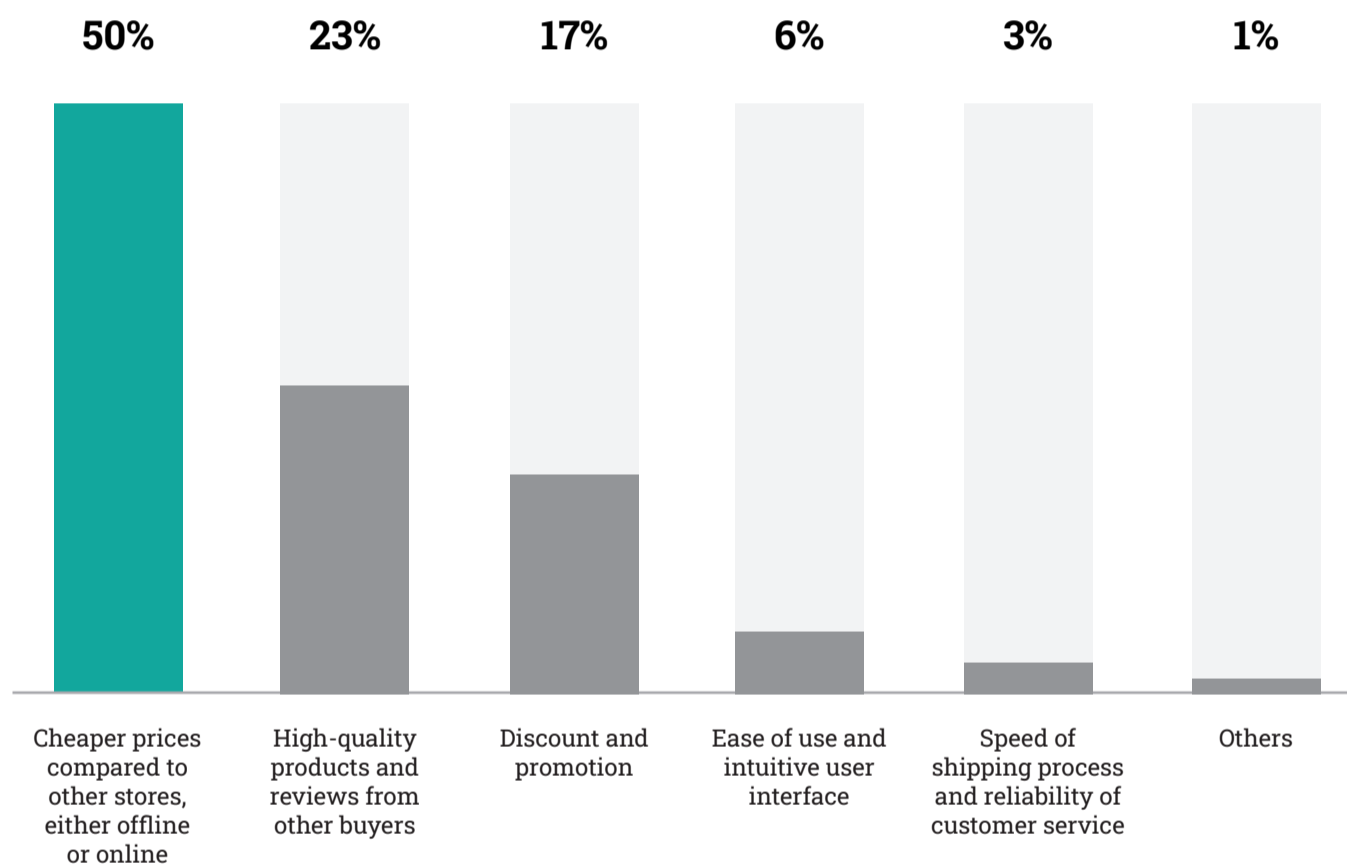
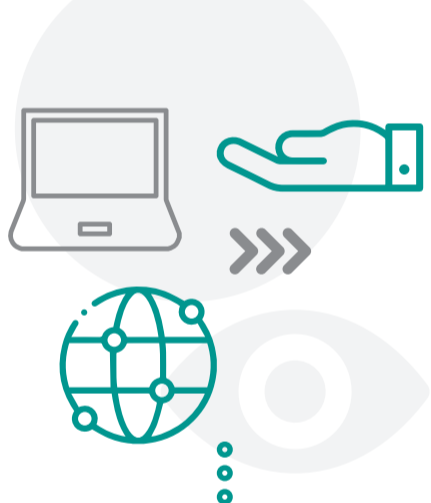


# Gratis Ongkir and FOMO are drivers behind Gen Z's shopping behavior

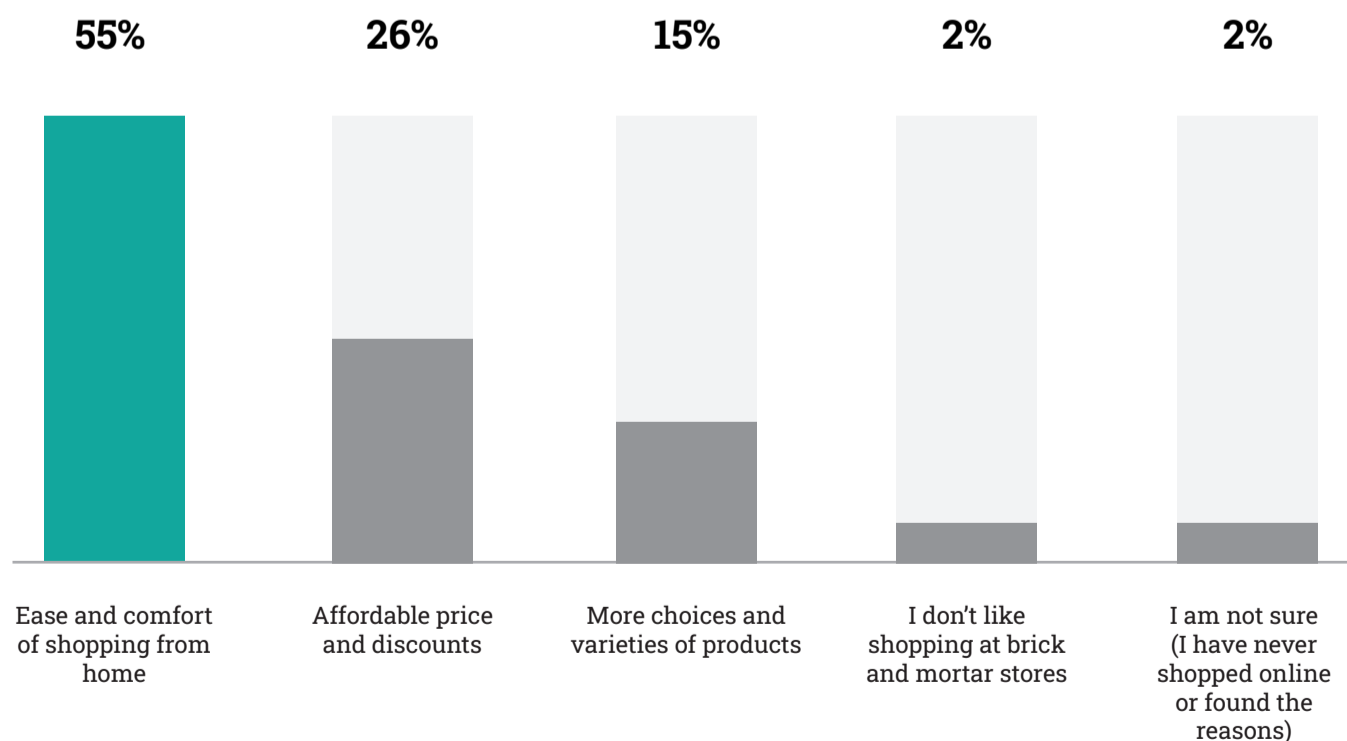
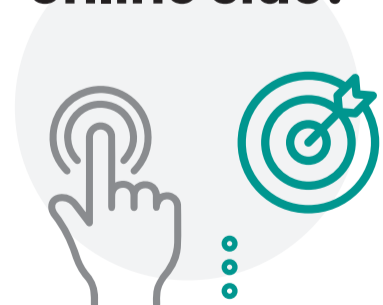
Indeed, when it comes to online shopping, price emerges as the foremost decisive factor for consumers. The attractiveness of competitive prices and affordability heavily influences purchasing decisions. Concurrently, the primary impetus behind the choice of online shopping is convenience. The ease and accessibility of making purchases from the comfort of one's own space, coupled with the convenience of browsing and comparing products, propel individuals towards the online shopping sphere. This symbiotic relationship between pricing and convenience underscores the pivotal role these factors play in shaping the preferences and behaviors of online shoppers.



## What do Indonesian Gen Z take into considerations while shopping online?



## Why is the grass greener on the online side?





Jessica Harviali admits that as a content creator who focuses on makeup and skincare, she almost exclusively shops online. “Besides being more convenient, the online shopping experience has made me more thoughtful in choosing products to purchase. There are several factors I consider when shopping online, including reviews from previous buyers, product display, offered discounts, seller’s service, packaging, and delivery,” says Jessica.

However, she also mentions that the explosive growth of online shopping and the beauty industry in Indonesia might have led to consumerism. “The Indonesian beauty industry, with its innovations and efforts to accommodate the diverse needs of Indonesian consumers, has led to FOMO - which I also experience as a beauty influencer. Many young people buy products just to stay up to date with various trends, such as experiencing the benefits of the latest active ingredients, the newest product innovations, and even the latest packaging.”

To cope with FOMO and avoid consumerism, Jessica emphasizes the importance of only purchasing products that are genuinely needed. “But it all comes back to the needs and the quality of the product. I usually consider a few things, such as whether the product is genuinely good, suitable for my persona and skin, and whether it fits within my budget.”

“As a content creator, I am always selective in choosing products to review and recommend in my content. I also strive to provide information as honestly and transparently as possible so that people can weigh whether the product would be useful and suitable for their skin type. My hope is that people who see my content will be aided by the recommendations and reviews I provide and not purchase a product solely because of FOMO.”

**“The Indonesian beauty industry, with its innovations and efforts to accommodate the diverse needs of Indonesian consumers, has led to FOMO - which I also experience as a beauty influencer. Many young people buy products just to stay up to date with various trends, such as experiencing the benefits of the latest active ingredients, the newest product innovations, and even the latest packaging.”**



- **Jessica Harviali**  
Beauty Content Creator



# Case in point #1: Utilizing social media and influencers for product launch

“Garnier Skincare Masterclass #DRAWAT” from Garnier Indonesia and IDN Creative won the silver prize in the Hashtag Asia Awards for Best Social Brand Launch category. Hashtag Asia Awards is organized by Marketing Interactive.

Quincy Meilisa, Senior Brand Communications Manager of L’Oréal, the company which owns Garnier, said that the brand’s collaboration with social media influencers complemented the existing channel mix. “Influencers are considered to be closer and more “authentic” in delivering messages tailored to their followers’ profiles. Therefore, creators serve as our means to directly reach consumers in a closer and more engaging manner, akin to their friends,” said Quincy.

There are two steps to consider when choosing social media influencers to work with in a campaign, according to Quincy. “First is the objective of the campaign, whether it is upper funnel (awareness) or lower funnel (sales). For awareness, of course, popularity/number of impressions becomes one of the main determining factors, while for sales, content excellence will be the main factor,” she elaborated.

“Second, we will conduct a value match by considering the profile, background, and previous collaborations with other brands to ensure alignment with our brand/company values.”

On the other hand, IDN Creative, as an agency, plays a key role in defining the brand’s message and communication channels. As a unit of IDN Media, IDN Creative possesses a deep understanding of millennials and Gen Z, who constitute the largest target audience for brand campaigns.

IDN Creative’s primary task is to understand its own audience and determine which segment of the IDN audience is the most suitable based on internal research about the audience. Consequently, they understand how to effectively communicate the brand message to the audience.

“The aim is to create an overarching strategy on how to change the audience’s perspective on a certain brand based on our profound understanding of millennials and Gen Z,” said Maria Novena Rarahita, Team Lead at IDN Creative.

“Influencers are considered to be closer and more “authentic” in delivering messages tailored to their followers’ profiles. Therefore, creators serve as our means to directly reach consumers in a closer and more engaging manner, akin to their friends.”



- **Quincy Meilisa**  
Senior Brand Communications  
Manager of L’Oréal



“The aim is to create an overarching strategy on how to change the audience’s perspective on a certain brand based on our profound understanding of millennials and Gen Z.”

- **Maria Novena Rarahita**  
Team Lead at IDN Creative

Case in point #2:

## The shift in beauty industry due to Gen Z and influencer marketing



“Consumers are demanding products that cater to their specific skin needs and conditions. This is pushing the beauty industry to develop new technologies that can aid in personalizing products and services.”

- **Judithya Pitana**  
Editor-in-Chief of POPBELA.com

The beauty industry in Indonesia is experiencing rapid growth, particularly among the younger generation. We spoke with Judithya Pitana, Editor-in-Chief of POPBELA.com, a part of IDN Media, to discuss recent trends and how influencer marketing has brought about some changes in the beauty industry.

According to Judith, millennial and Gen Z consumers are becoming more aware of their actual needs in a beauty product. This has led to an increased demand for natural, effective products that are free from harmful chemicals in the beauty industry.

“Consumers are demanding products that cater to their specific skin needs and conditions. This is pushing the beauty industry to develop new technologies that can aid in personalizing products and services,” said Judith.

Given that climate change and environmental degradation are significant concerns among Gen Z, they also want their beauty products and packaging to be sustainable.

Perhaps the most notable change in the beauty industry is the shift in beauty standards themselves. According to Judith, there are three key preferences among Gen Z when it comes to choosing beauty products:



### **Inclusive representation**

Gen Z are more inclined to choose beauty brands and products that showcase diverse body types, skin tones, and facial features. They want to see themselves reflected in the beauty brands and products they use.



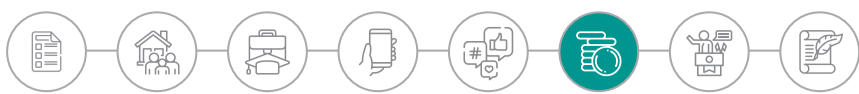
### **Sustainability**

They are more likely to opt for beauty brands and products committed to sustainability and social responsibility. They want to support brands that share their values.



### **Affordability and accessibility**

They are more likely to choose affordable beauty brands and products that are accessible to everyone. They believe that beauty is for everyone, regardless of their background or social status.



## Buy Now, Pay Later offers flexibility for Gen Z

“Buy now, pay later,” or simply “paylater,” is gaining popularity as a payment method among Indonesian Gen Z. In an additional survey with 50 respondents, 46% of Gen Z reported using the paylater feature.

The reasons for Indonesian Gen Z using paylater are diverse. Some use it because they lack the budget at the time of purchase (39.1%), some appreciate the flexibility it offers in managing their budget (30.4%), others want to take advantage of discounts or promotions (26.1%), and a small percentage don't have credit cards (4.3%).

Paylater services are employed for a wide range of expenses, from home appliances and fashion to food and drinks. Most of Gen Z in our survey who have used paylater services also admit to resorting to paylater for emergency spending. However, the majority of respondents who use paylater reported that paylater accounts for less than 25% of their total monthly spending.

### Indonesian Gen Z use Buy Now, Pay Later (BNPL) for various purchases, but percentage of BNPL use still low



**What is the percentage of Indonesian Gen Z's Buy Now, Pay Later usage compared to total monthly spending?**

|  |                       |             |
|--|-----------------------|-------------|
| <span style="color: teal;">■</span>      | Less than 25%         | <b>87%</b>  |
| <span style="color: orange;">■</span>    | 25%-50%               | <b>8.7%</b> |
| <span style="color: darkred;">■</span>   | 51%-75%               | -           |
| <span style="color: grey;">■</span>      | More than 75%         | -           |
| <span style="color: lightgrey;">■</span> | I do not use paylater | <b>4.3%</b> |



The survey indicated that notifications and offers from shopping apps play a significant role in encouraging the use of pay later, both in the form of push notifications and prompts or offers when users are on the payment page.



### What makes Indonesian Gen Z prefer using Buy Now, Pay Later?

|                                   |       |
|-----------------------------------|-------|
| 0% interest or low fees           | 47.8% |
| Extended payment periods          | 17.4% |
| Abundant promotions and discounts | 26.1% |
| None of the above                 | 8.7%  |

### Most popular Buy Now, Pay Later services in Indonesia

Shopee Paylater

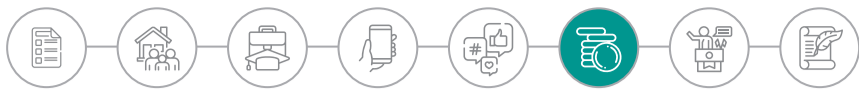
GoPay Later

Kredivo

Akulaku

Dana





**“We need to know the manual, how to use it. As long as we are disciplined, we can use it to get cashback, but if possible, try not to pay interest.”**



- **Samuel Ray**  
Frugal Living Practitioner  
and Content Creator

It's important to note that the flexibility of buy now, paylater can lead to more impulsive and frivolous spending. A majority (69.6%) of Gen Z in the survey stated that paylater enables them to make frivolous purchases. Furthermore, 95.7% expressed concerns that paylater could lead to excessive and impulsive spending. The majority of respondents who do not use paylater often fear that this feature may lead to uncontrolled spending.

Interestingly, the surveyed Gen Z claimed to be diligent in adhering to paylater credit repayments. This behavior may be influenced by concerns about the impact of paylater usage on their credit scores, with 60.9% stating that there is a negative stigma associated with paylater use in Indonesian society.

Frugal living practitioner and content creator Samuel Ray told IDN Media that paylater is just a financial product that can be used or not. “We need to know the manual, how to use it. As long as we are disciplined, we can use it to get cashback, but if possible, try not to pay interest,” said Samuel.

### 3 tips to manage paylater use and avoid impulsive spending from Samuel Ray, frugal living practitioner and content creator:



“It’s acceptable to activate the paylater feature on multiple apps, but it’s advisable to keep notifications turned off to resist temptation.”



“Manage money according to financial ability. I don’t trust my own self-control, so it’s better to invest money right away. It’s better to not have a very high paylater limit so that the debt doesn’t get out of control. If you are not sure you can use it responsibly, there’s always the option of not using it at all.”



“Keep ourselves busy and productive to avoid mindless spending.”

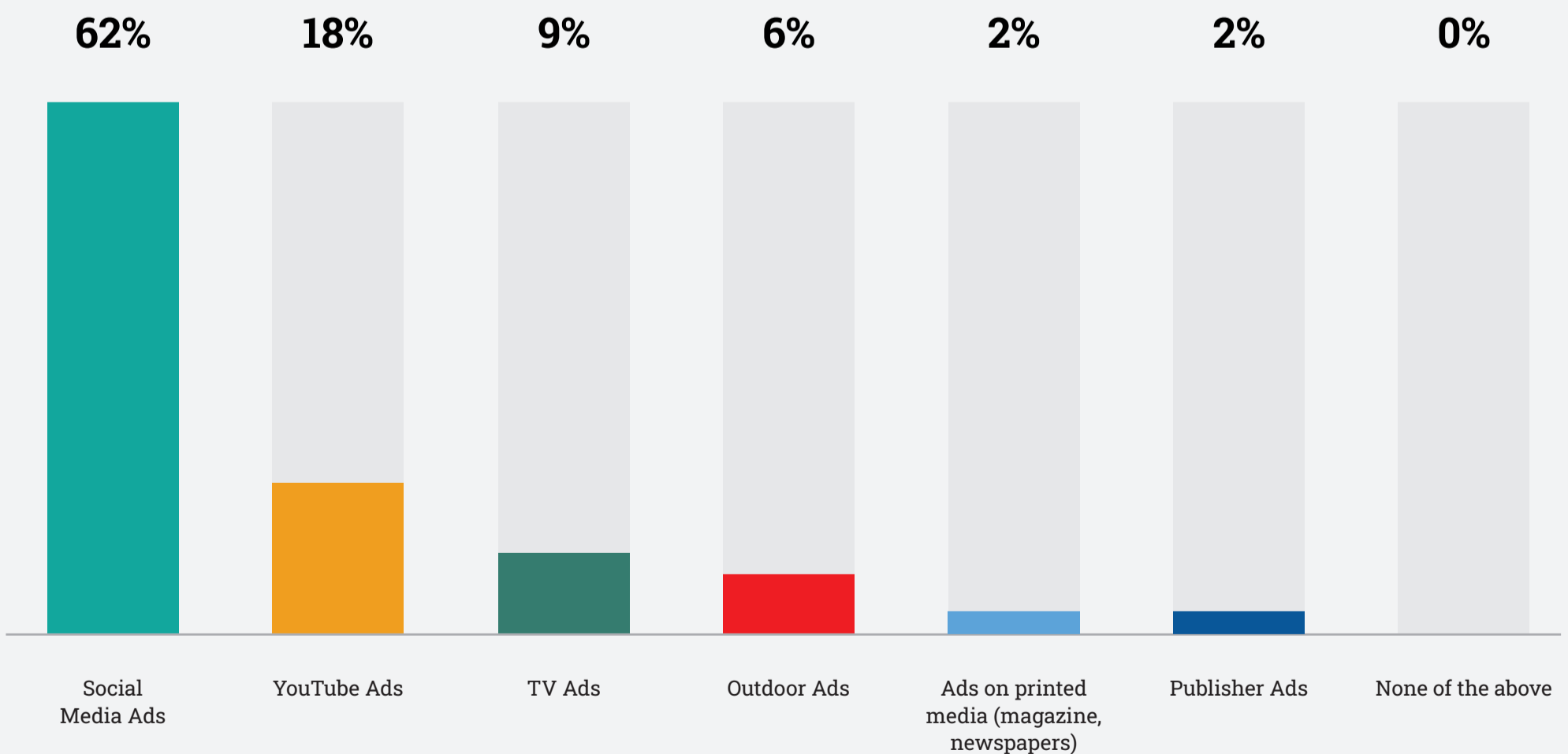
## Social media ads is the most effective and visible for Gen Z

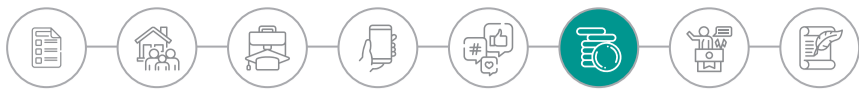
Digital advertisements play a significant role in shaping the shopping behavior of Gen Z. A considerable 44% of Gen Z acknowledge being moderately influenced by ads, while 34% concede that ads hold a high level of influence over their decisions.

Interestingly, despite the fact that 89% of Gen Z in our survey report frequently blocking ads while browsing the internet, they still recognize the substantial influence of social media ads. This might be due to certain social media platforms offering ads that are immune to third-party ad-blockers. Additionally, paid partnership content that isn't technically classified as ads can contribute to this phenomenon. Furthermore, the extensive time Gen Z spends on social media platforms exposes them to a greater number of advertisements, adding to their overall impact.

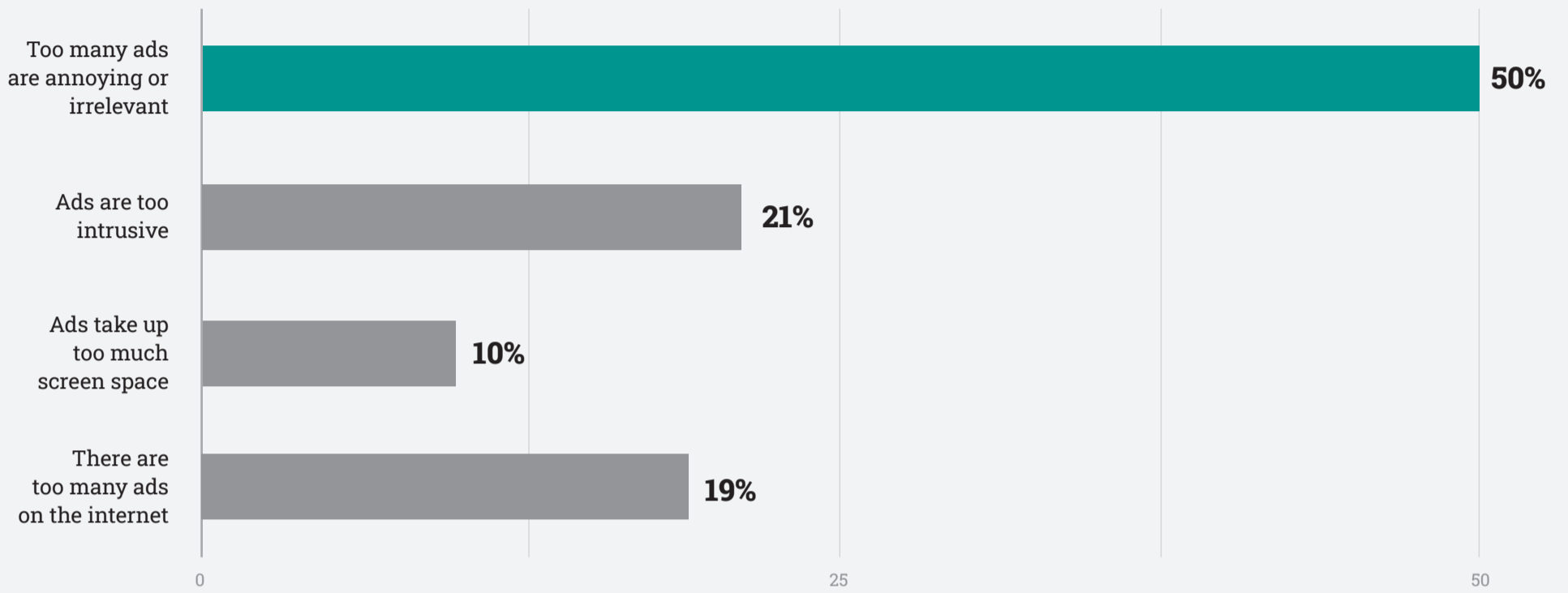


## What kind of advertisement that influences you the most?





# Top 4 Ad-Blocking Motivations (% of Gen Z ad-blockers who block ads for the following reasons)



The parasocial relationships cultivated through social media create an environment where individuals are more susceptible to the influence of content, whether it's advertising or organic content. This is particularly true when the content is presented in a personalized and relatable manner.

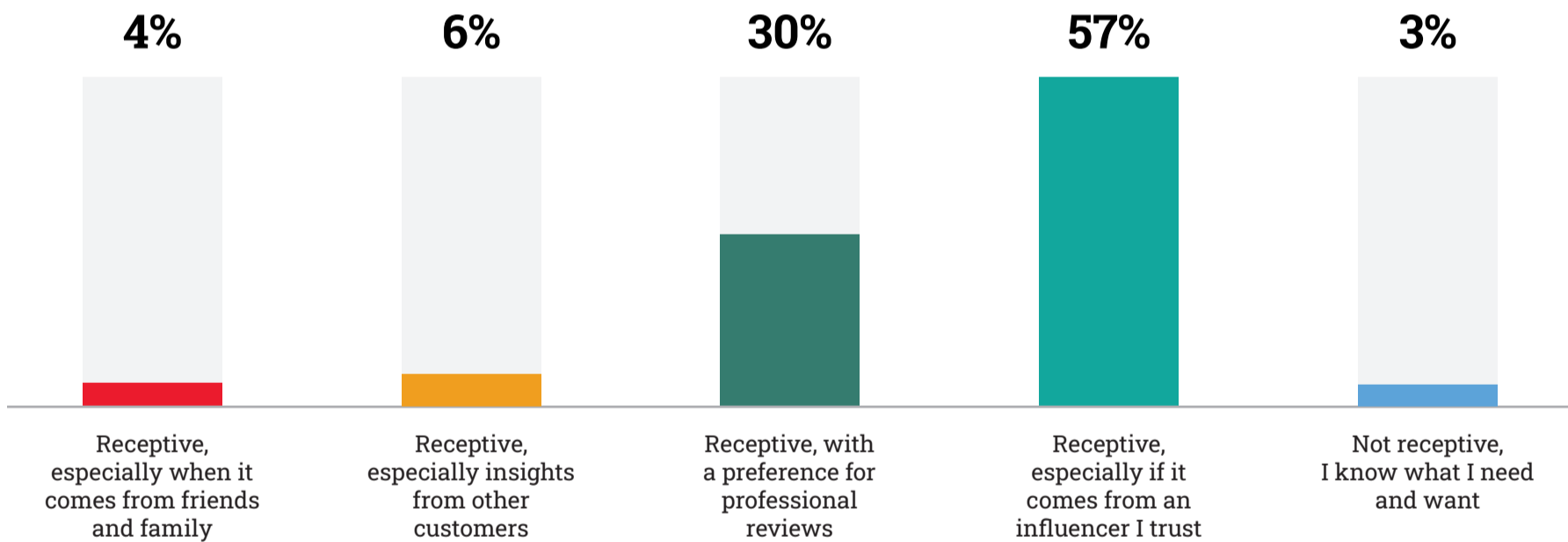
Indeed, there is a noticeable trend in the advertising landscape where ads or paid partnerships closely resemble authentic content, such as personal stories or reviews. This blurring of lines between advertisements and genuine content can make it challenging for consumers to differentiate between the two. Additionally,

the emergence of affiliate marketing through social media platforms further contributes to this subtlety, as regular individuals promote products with the potential to earn commissions.

An additional survey to 50 respondents that the IDN Media team conducted reveals that Gen Z are receptive to information that helps them make decisions and appreciate insights that come from other customers. 59% of the respondents even say that they often proceed to purchase the product after watching product reviews on platforms like TikTok or YouTube, showcasing the power of video-based review content.

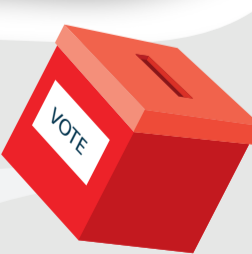
**Gen Z shows a strong affinity for influencers who mirror their age, interests, and activities. Influencers have gained substantial influence in recent years, significantly impacting Gen Z's product preferences. Authenticity and relatability are paramount for Gen Z**

When considering a purchase, how receptive are you to information aiding your decision-making process?

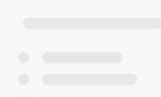


The increasing subtlety of ads and the lack of clear digital literacy guidelines can create a situation where consumers might be misled into thinking that the content is purely genuine, rather than paid promotion. This underscores the importance of improving digital literacy among consumers and establishing clearer regulations to ensure transparency and authenticity in advertising practices.

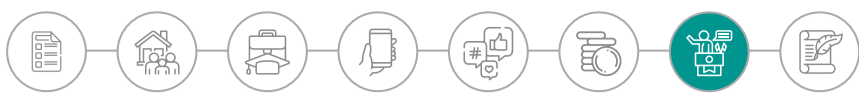




**NEED  
YOUR VOTE**







# Political Landscape

## Despite dissatisfaction with Indonesian democracy, Gen Z will be going to the polls in search for leader with integrity and anti-graft platform

Millennials and Gen Z are set to dominate the votes in the 2024 elections, according to the General Elections Commission (KPU). Out of 204 million voters, 46.8 million are Gen Z and 66.8 million are millennials.

The IDN Media team conducted a survey to 300 Gen Z to understand their perspective on the upcoming elections and views on the Indonesian political landscape. We find a pervasive dissatisfaction in Indonesian democracy today among the Gen Z, with 15% saying that they are completely dissatisfied, 59% say that they find the quality of democracy to be lacking, 24.3% saying they are satisfied enough, and a little minority (1.7%) saying that they are very satisfied with democracy in the country.

This dissatisfaction comes 25 years after Indonesian political reform, which brought about a new wave of democracy in Indonesia. This is concerning since it erodes trust in democracy as a political system. In a question about their views on the political system, 25.3% say democracy might not be the most suitable in certain situations, while 10.7% say that any political system will not change anything. While 64% of Gen Z in our survey think that democracy is still superior compared to other alternatives, this growing disillusionment on democracy is not something to be trifled with.

## Gen Z think Indonesian democracy is backsliding and freedom is eroding

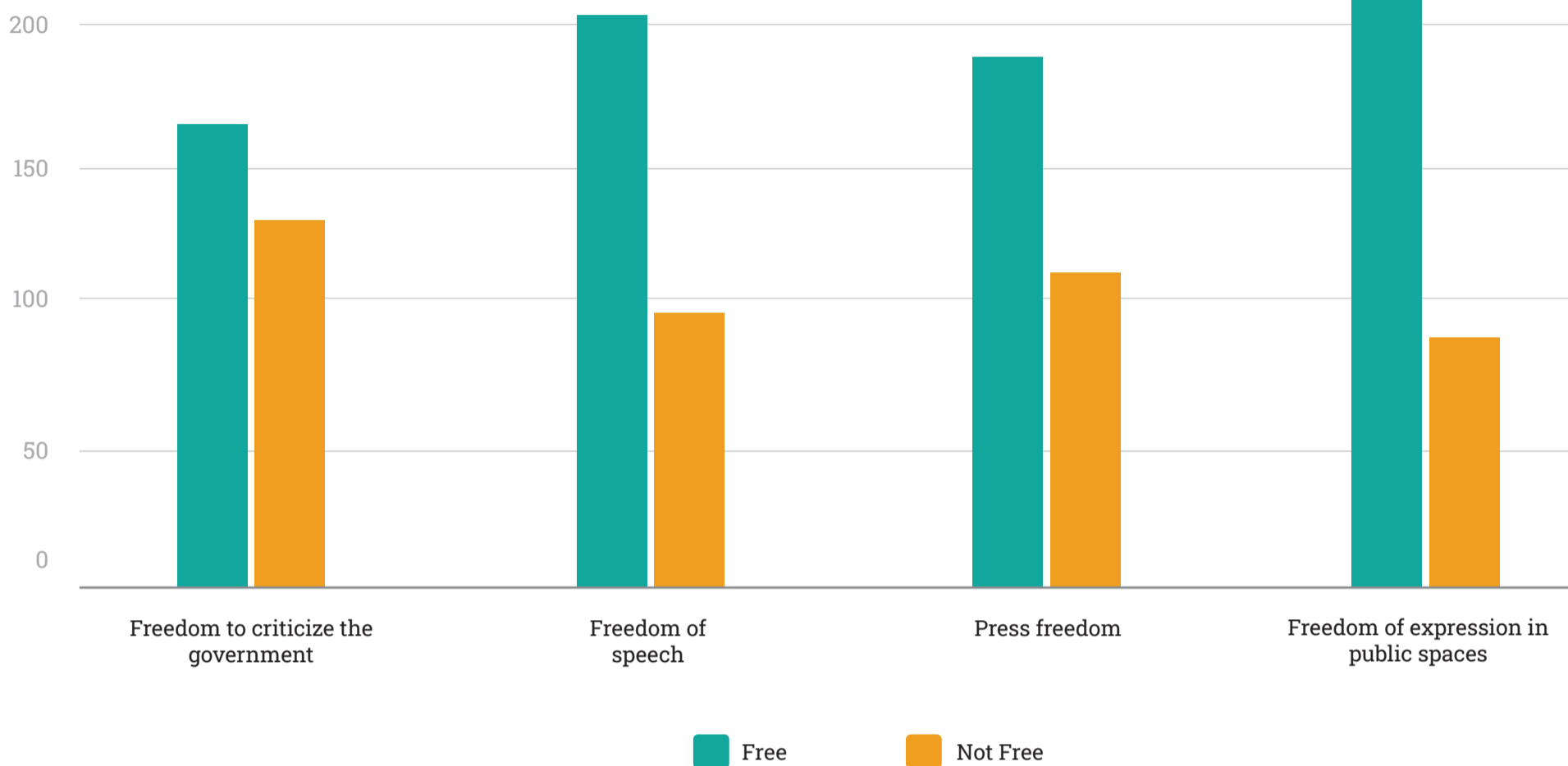


### How satisfied are you with the quality of Indonesian democracy today?

|                                       |                         |              |
|---------------------------------------|-------------------------|--------------|
| <span style="color: teal;">■</span>   | Completely dissatisfied | <b>15%</b>   |
| <span style="color: blue;">■</span>   | I find it to be lacking | <b>59%</b>   |
| <span style="color: orange;">■</span> | Satisfied enough        | <b>24.3%</b> |
| <span style="color: red;">■</span>    | Very satisfied          | <b>1.7%</b>  |



# What are your views on the following aspects of freedom in Indonesia?



Exploring Gen Z’s vision of an ideal future for Indonesia could provide valuable insights into how to restore their faith in democracy. A significant majority of Gen Z, constituting 65.7%, envisions an Indonesia that prioritizes the rule of law, maintains a robust anti-corruption system, and commands respect on the global stage. For 18.7%, an ideal Indonesia is characterized by high-quality public services. An additional 8.7% emphasize the importance of diversity and tolerance, aspiring to see a country that embraces individuals from various backgrounds, epitomizing the Indonesian national motto of “Bhinneka Tunggal Ika” (Unity in Diversity). Meanwhile, 7% express a desire for a nation that safeguards the rights and freedoms of all its citizens.

It can be argued that the quality of public services is intrinsically linked to the issue of corruption, as a strong anti-graft system is crucial for ensuring effective and efficient public service delivery.

# Re-imagining Indonesia

## What does an ideal Indonesia look like to you?



- A country that upholds the rule of law, has strong anti-graft system, and is respected by other countries **65.7%**
- A country that provides high quality public service **18.7%**
- A country that that accepts every person from various backgrounds **8.7%**
- A country that guarantees every citizen's rights and freedom **7%**

Source: IDN Media  
N: 300 responses

The disillusionment with democracy among Indonesian Gen Z can be closely linked to their perception of insufficient progress in the fight against corruption, often involving government officials. Examples include figures like Minister of Communication and Information Technology Johnny G. Plate and Social Affairs Minister Juliari Batubara, whose alleged involvement in corruption cases has raised concerns and contributed to a sense of dissatisfaction with the democratic system.

The 2022 Corruption Perceptions Index (CPI), released by Transparency International in early 2023, revealed that Indonesia secured a score of 34, placing it 110th out of the 180 countries surveyed. The CPI is a comprehensive gauge used to assess public sector corruption perceptions on a scale ranging from zero (indicating high corruption) to 100 (reflecting a very clean environment).

Comparatively, Indonesia's 2021 score was 38, making the 2022 performance the most substantial drop since 1995. Notably, the 2022 score of 34 was identical to the 2014 CPI score.

The most significant decline in the CPI was observed in the International Country Risk Guide's Political Risk Service (PRS) indicator, which plummeted from 48 points in 2021 to 35 in 2022. This indicator is associated with political system corruption, conflicts of interest among politicians and business figures, and the prevalence of extra payments or bribery concerning export-import permits.



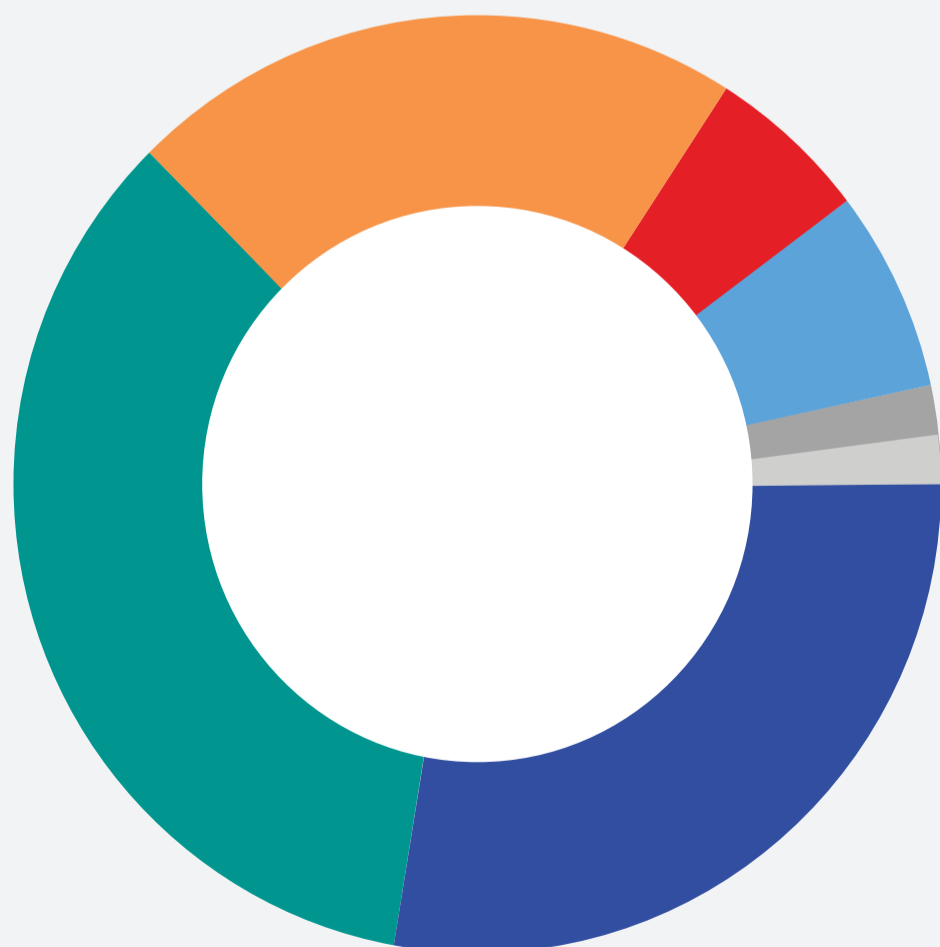
# Jobs, graft eradication, and welfare are three main issues that Gen Z care about in 2024 elections

The majority of Gen Z respondents in our survey express their intention to participate in the upcoming elections, believing that elected officials will significantly influence both their daily lives and the overall state of the nation.

Specifically, 70.3% of Gen Z respondents in the survey indicate their commitment to engaging in all elections, with 15% specifying their participation in presidential elections exclusively. Meanwhile, 13% remain undecided, and a small minority expresses their intent not to vote.

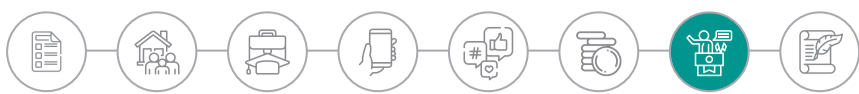
In terms of the key socio-political concerns driving their participation in the 2024 elections, the Gen Z individuals in our survey identify issues like job opportunities, welfare, anti-corruption measures, healthcare, democracy and civic freedoms, and environmental matters as top priorities.

These priorities likely stem from the personal challenges they face, which are predominantly characterized by soaring grocery and basic necessities prices, limited job prospects, elevated poverty rates, environmental degradation, exorbitant healthcare costs, and deficiencies within the education system.

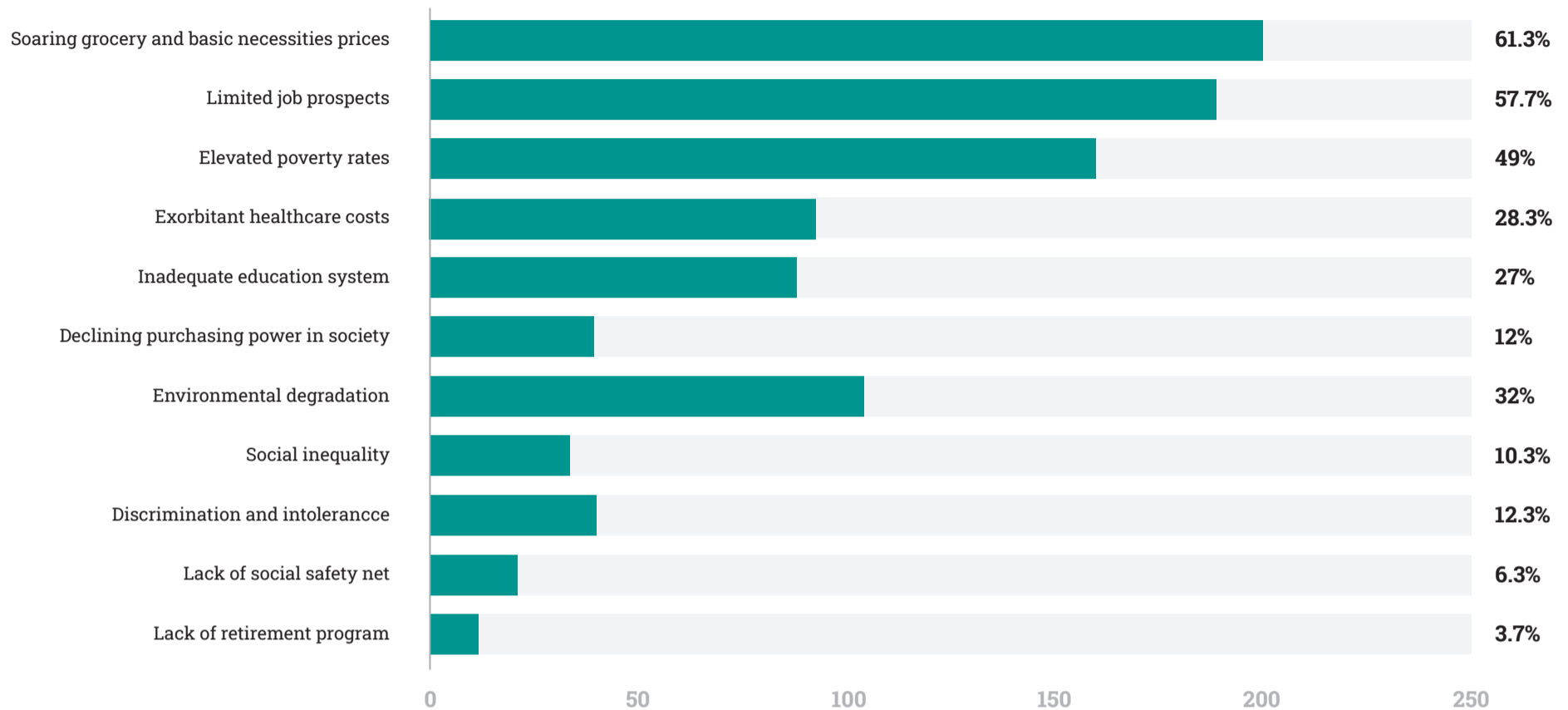


## What issues will be your main concern in the 2024 elections?

|                              |       |
|------------------------------|-------|
| Welfare                      | 27.7% |
| Job opportunities            | 35%   |
| Graft eradication            | 21.3% |
| Democracy and civic freedoms | 5.7%  |
| Healthcare                   | 7%    |
| Environment                  | 2.3%  |
| Others                       | 2.1%  |



## What challenges do you personally face today?



\*Multiple-response questionnaires allow the total result to exceed 100%.

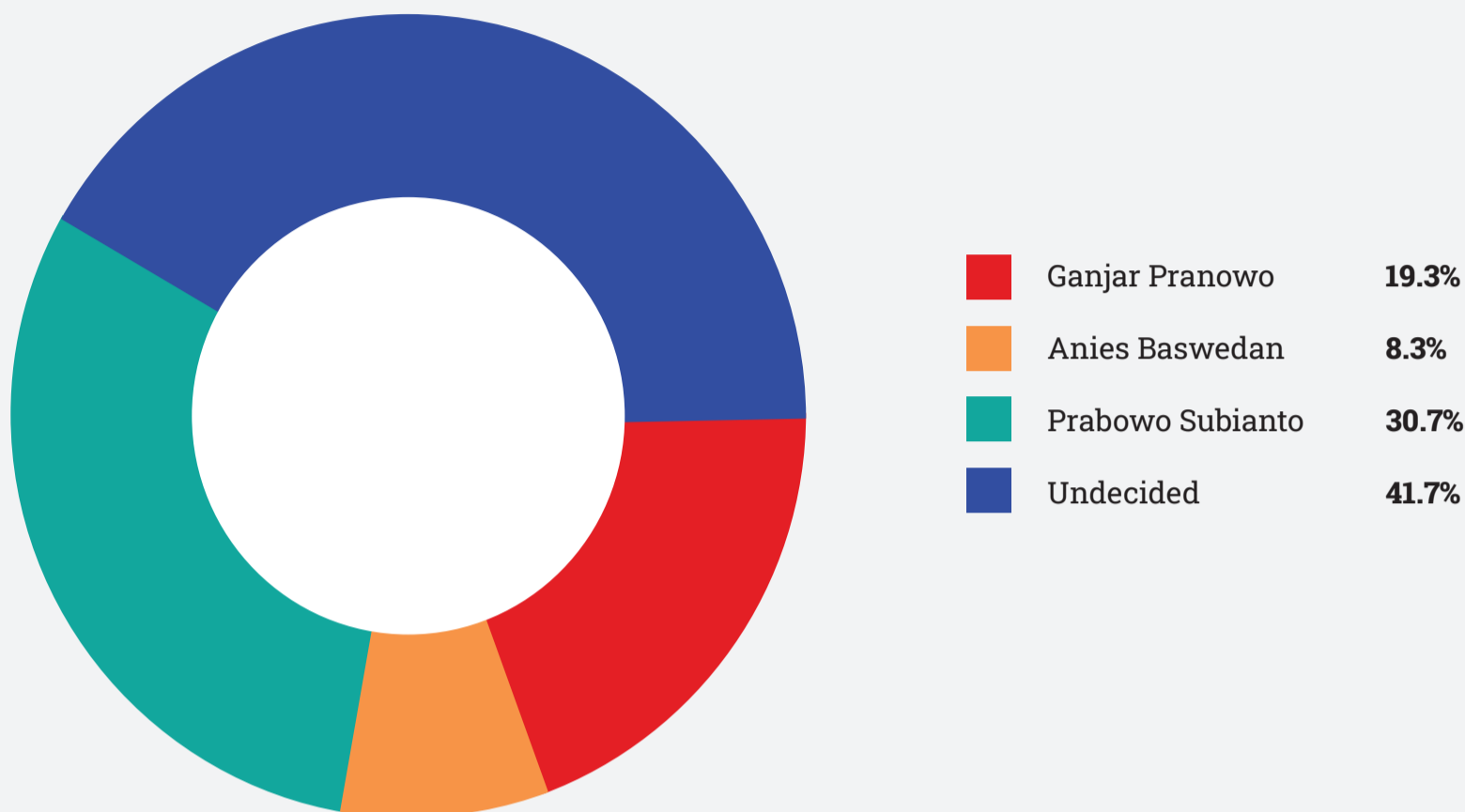
## Gen Z is still undecided about presidential candidates but seeks leaders with integrity, charisma, and a strong connection to the grassroots

As of the writing of this report in October 2023, Indonesian Gen Z finds themselves in a state of indecision regarding their preferred presidential candidate. What's clear, however, is their collective vision for the elected leader. Gen Z places high importance on selecting a candidate capable of effectively guiding the nation through times of crisis, crafting innovative policies, fostering positive change, and judiciously managing the state budget.

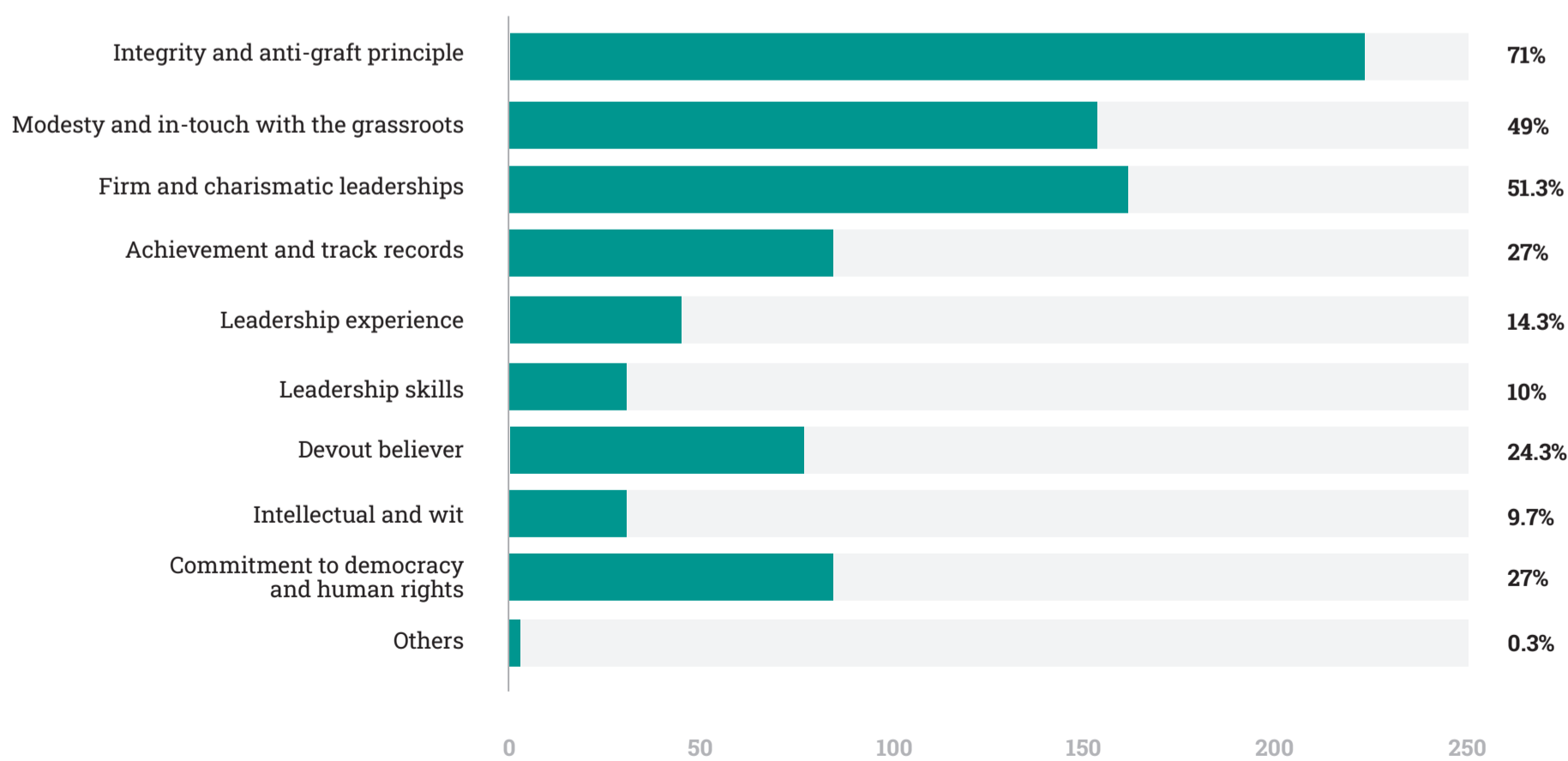
Character traits are also pivotal in their decision-making process. Integrity and a resolute anti-corruption stance rank as the top priorities, underscoring their demand for ethical governance. Furthermore, they value a leader who exudes firm and charismatic leadership qualities, as well as one who exhibits modesty and a connection with the people, symbolizing an approachable and down-to-earth leader who genuinely engages with citizens – what can be described as a leader who “touches the grass.”



## If the presidential election is held today, who will you vote for? (As of September 2023)



## What character traits a leader requires to lead Indonesia in 2024?



\*Multiple-response questionnaires allow the total result to exceed 100%.



It can be contended that all the individuals who have announced their presidential candidacies possess these sought-after character traits. However, in the final analysis, what will truly influence the Gen Z vote is the candidates' stance on the issues that matter most to them. The alignment of a candidate's platform with Gen Z's priorities, such as job opportunities, welfare, anti-corruption measures, health, democracy, civic freedoms, and the environment, will play a decisive role in determining their electoral support. In essence, while character traits are significant, it's the policy proposals and commitment to addressing these critical concerns that will sway the vote of Indonesian Gen Z in the upcoming elections.

## Top 5 most identifiable political parties



# For You Page or For Your President? Those who win TikTok win the votes

As a generation deeply intertwined with the digital age, Indonesian millennials and Gen Z make up a substantial portion of the voting population, positioning them as pivotal players in the upcoming 2024 elections. Fueled by social media and an insatiable thirst for information, they are not only navigating the complexities of modern life but also actively shaping the country's political landscape. This demographic shift is ushering in a new era of civic participation and change, where their voices and votes carry significant weight in influencing the nation's future direction.

"Online media and social media are increasingly playing a role in decision-making among young people, including political decisions," said IDN Times Editor-in-Chief Uni Lubis. Uni cited Hillary Lasut as an example of the power of social media. Hillary, the youngest member of the Indonesian People's Representative Council (DPR), was elected in the 2019 elections. This representative from North Sulawesi secured 70,345 votes and made it to the parliament due to her active social media campaigning.

"Besides being cost-effective, campaigns on social media can also be precisely targeted through algorithms. In Indonesia, there are still regions with limited internet penetration, where local media and door-to-door canvassing campaigns still play a crucial role," said Uni.

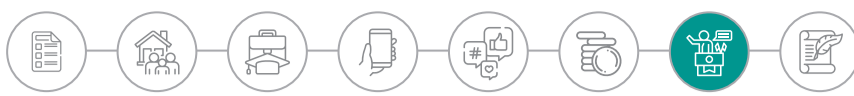
Social media platforms undoubtedly play a significant role in politics, not only in Indonesia. Many digital communication experts have referred to 2024 as the "TikTok Election Year." TikTok's role is increasingly important as a source of information for young people, even becoming their search engine. TikTok's algorithms are highly efficient in flooding users' feeds with content. The results of the previous presidential election in the Philippines serve as evidence of how Marcos Jr., also known as "Bong-Bong," effectively reached and convinced Gen Z voters through TikTok.

**"Online media and social media are increasingly playing a role in decision-making among young people, including political decisions."**

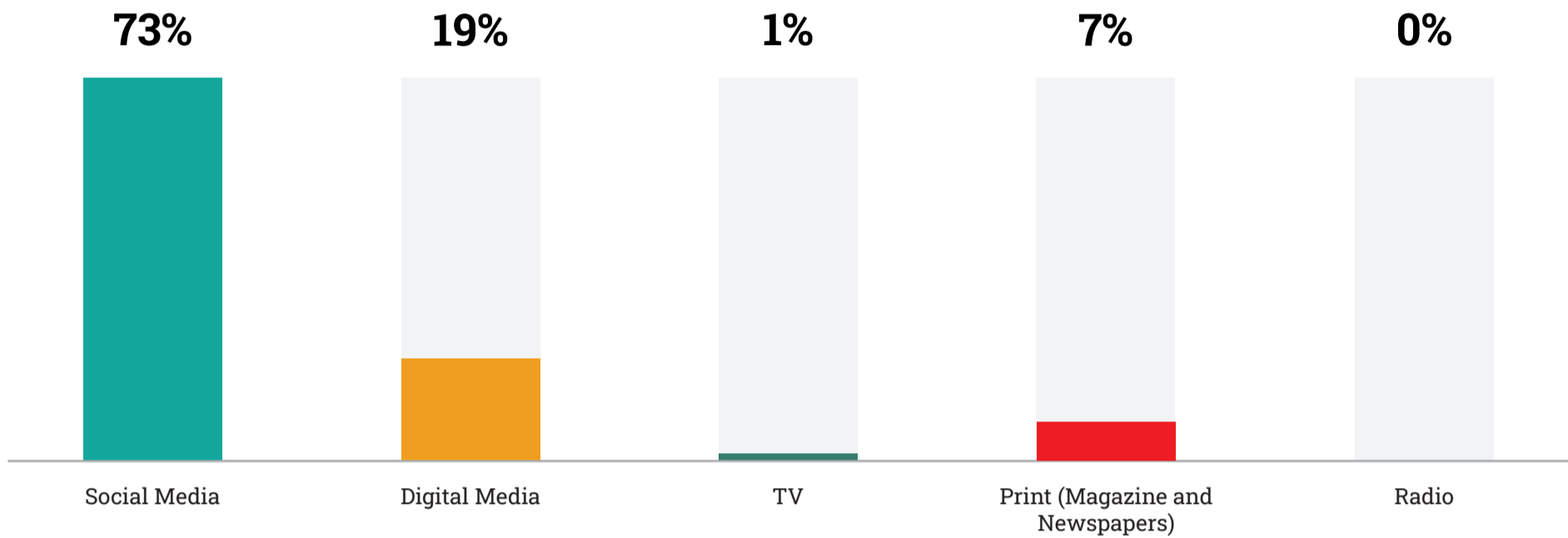
**Besides being cost-effective, campaigns on social media can also be precisely targeted through algorithms. In Indonesia, there are still regions with limited internet penetration, where local media and door-to-door canvassing campaigns still play a crucial role."**

- **Uni Lubis**  
Editor-in-Chief of IDN Times





## Gen Z get their news from social and digital media, leaving TV and print out in the cold



Uni also argues that social media and digital tools should empower young voters, rather than treating them as passive objects or a captive audience for political campaigns. “Young people can use social media to voice their opinions, influence public discourse, and drive decision-making. Then, they should vote for political parties and legislative candidates with a proven track record

on important issues. Don’t be swayed by empty promises and money politics,” Uni emphasized.

However, Uni also cautioned against the upcoming waves of misinformation and hoaxes that are likely to surface as the election draws nearer, especially now that the use of artificial intelligence has become more widespread.

## Voter education platforms and advanced civic engagement are essentials for increasing meaningful participation among the youth



IDN Times has been managing the Millennials Memilih platform since 2019, which caters to the curiosity of young people about the visions, missions, political parties, and politicians. We have received over 2,000 questions from users and provided answers in the form of thousands of articles and 37 weekly talk shows. This platform received the Digital Media Award (WAN IFRA) for the best platform engaging with millennial audiences.

This year, we continue with the Gen Z Memilih platform from February 14, 2023, with enhanced features, including automatic point redemption that can be exchanged for cash. This serves as an incentive for users. Gen Z Memilih has become an official partner of the KPU in the 2024 Elections due to its proven track record and contributions in 2019.



**“First, let’s define what apathy is because the Indikator survey indicates that the majority of young people are concerned about various issues. But the question is whether this concern translates into political participation. There’s a broken bridge between youth concerns and their participation.”**

- **Andhyta Firselly Utami**  
Environmental Economist and  
Founder of Think Policy



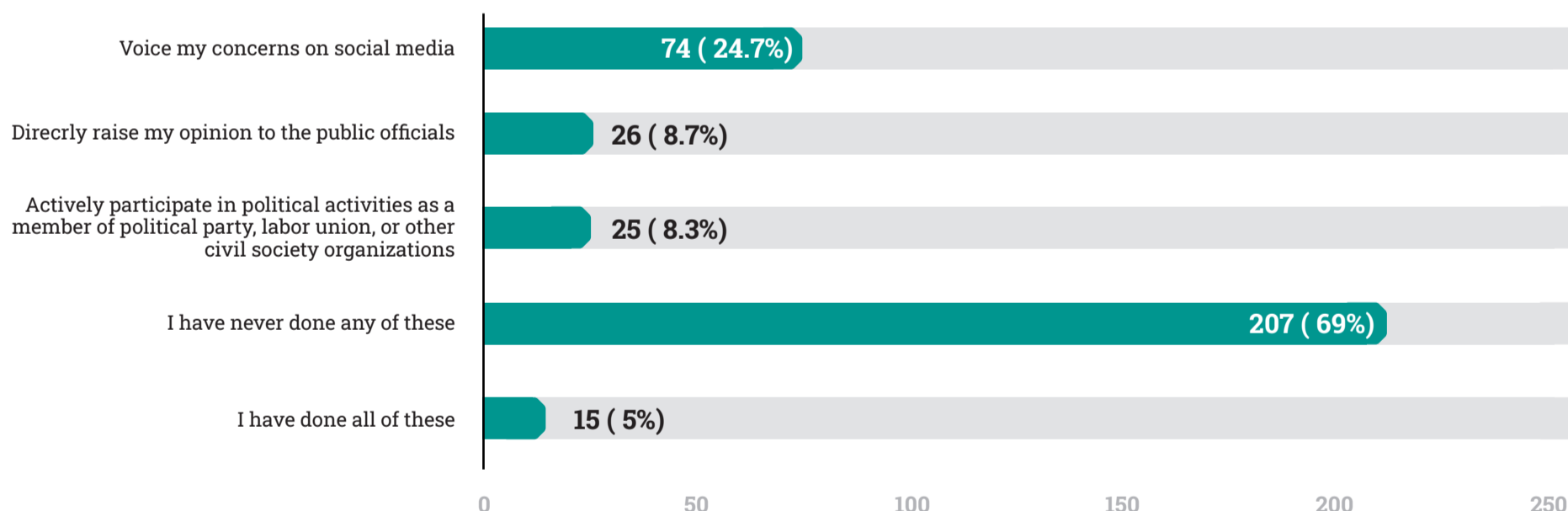
Andhyta Firselly Utami (Afutami or Afu), an environmental economist who is the founder of Think Policy Indonesia and a collaborator with BijakMemilih.id, shares Uni’s concerns regarding misinformation. She emphasizes the need for civic education that empowers individuals rather than serving as mere propaganda to manipulate people into specific beliefs or narratives. “Civic education should enlighten and empower citizens to become wise and courageous voters who can make informed choices, rather than passive individuals influenced by social media,” said Afutami.

Afu disagrees with the notion that young people are apathetic toward politics.

“First, let’s define what apathy is because the Indikator survey indicates that the majority of young people are concerned about various issues. But the question is whether this concern translates into political participation. There’s a broken bridge between youth concerns and their participation,” said Afu.

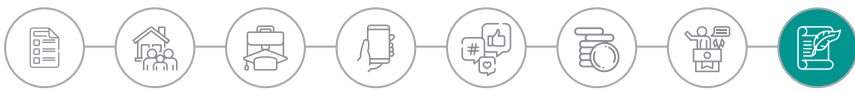
“Perhaps, the missing link is the absence of context that can make politics relevant to what young people care about.”

## Gen Z needs channels to actively participate in politics



Hence, Afu from Think Policy Indonesia, along with individuals from What Is Up Indonesia, created BijakMemilih.id, an independent platform aimed at providing information on political parties and their positions on the issues that young people care about.

“We should have more youth representatives in the government, but mere representation is not enough. We should also ensure that they truly represent the interests of youth in general. The second is to involve young people beyond these elected officials and their staff, for instance in the discussions or planning for a development project,” said Afu. “Young people should not only be a token in our politics, but have a meaningful and substantive participation.”



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# In-depth Interview Sources

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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.

## Research Partner:



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### About 99 Group

99 Group is the parent company of property platforms including Rumah123.com, 99.co, and the Singapore Real Estate Exchange (SRX). With a deep-rooted experience in the real estate domain, 99 Group consistently dedicates itself to building the easiest and most trusted property search platforms in Southeast Asia. 99 Group remains committed to providing comprehensive and all-encompassing services to fulfill the needs of property seekers. Our company is headquartered in Singapore and has offices in Jakarta, Bandung, and Surabaya.

Portal: [www.99.co](http://www.99.co) | [www.rumah123.com](http://www.rumah123.com) | [www.srx.com.sg](http://www.srx.com.sg)

LinkedIn: <https://www.linkedin.com/company/99-co/>



## Additional Community Support :

### About IDN Media Community

At IDN Media Community, our mission is to connect, empower, and inspire individuals who are passionate about creating and consuming digital content. We strive to foster a collaborative and inclusive environment that encourages innovation and creativity. We believe in the power of community to drive positive change and share impactful stories that resonate with our global audience.

Our community offers a multifaceted approach to growth. We host educational workshops, webinars, and provide resources to help members enhance their skills and networking. Additionally, you can connect with like-minded individuals, industry professionals, and influencers, sharing experiences and collaborating on projects. Our events, both virtual and in-person, create opportunities for learning, networking, and fostering meaningful connections.

Together, we work towards democratizing information. One step at a time, for a better Indonesia.

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