Understanding and Uncovering the Behavior, Challenges, and Opportunities

NEWS

IDN

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# **INDONESIA MILLENNIAL REPORT** 2024

IDN



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# **About the Report**



## Indonesian millennials by the numbers

With **70.72**% of its population in productive age (15 to 64), Indonesia is enjoying a demographic bonus, which is hoped to help the country achieve its golden period in 2045. The millennials, born between 1981 and 1996, make up the second largest generation in Indonesia with **25.87**% of the total population or **69.38** million people, trailing behind Gen Z (born between 1997 and 2012) at **27.94**% or **74.93** million people.

As all millennials have entered the productive age, they become a key driver in the country's economic growth. While there have been much discussion about millennials, most are based on anectdotal stories that lack evidence and data and hence might be more harmful than helpful. Understanding millennials, 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 millennials is very limited. This scarcity has caused the emergence of myths and stereotypes about the millennial generation. Therefore, IDN Research Institute, in collaboration with Advisia as our research partner, spearheaded this research to gain a deeper understanding about Indonesian millennials, especially their values and aspirations that shapes the way they see themselves as individuals. This research's objective is also to explore Indonesian millennials' 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 560 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 millennials' 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 another 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 millennials' news consumption. Furthermore, the IDN Media conducted a survey to 300 millennials about their views on the state of Indonesian democracy and the upcoming 2024 elections.

The definition of millennials in this report is male and female between the age of 27 to 42 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 millennials, 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 millennials better, and to unlock those who shape and will lead the nation.



# **Executive Summary**

Indonesian millennials have emerged as a dynamic and influential demographic group, shaping the country's economy, politics, and culture. Our surveys and interviews with Indonesian millennials and experts show some key trends that help us understand this generation:



Social media and digital platforms have emerged as an "alun-alun" for millennials, in which they communicate with one another, learn about the news and what happens in the real world, enjoy various formats of content available, and shop. However, the pervasiveness of digital activities among the Indonesian millennials is not matched with adequate awareness regarding personal data protection and internet etiquette, which can be harmful.



Half millennials identify themselves as part of the sandwich generation, showing increasing pressure to financial stability and mental health. These Indonesian millennials are responsible for caring both for their children and their aging parents. While as parents and as individuals they agree on the importance of mental health, Indonesian millennials are still struggling to access professional help to help with their struggles.



**Inequality, mental health, and social justice are millennials' top concerns, as climate change and gender inequality lurk behind**. Even though climate change and gender equality are seemingly more popular in social media, we find that Indonesian millennials still prioritize social and economic inequality. We believe that this is due to the fact that inequality can exacerbate the impacts of other issues.



Most Indonesian millennials are earning less than Rp 5 million per month, and they spend most of it on basic necessity. This means that Indonesian millennials cannot splurge on other things such as insurance, education and self-development, as well as entertainment. Therefore, it makes sense that some millennials, particularly those with more experience and professional network, become hustlers by taking freelance or part-time jobs.



The prevalence of online shopping is undoubtedly changing not only the millennial's behavior but also the way business works. As price and convenience become priorities for the rather frugal millennial shoppers, regular promotion and discounts as well as free delivery services have become the norm. Considering the limited budget, millennial 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 millennials, but collaborating with influencers, creators, and reviewers might create the biggest impact.



**Indonesian millennials 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), millennials 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 millennials, 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 7 days, Indonesian millennials' 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. Millennials 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 millennials care about, most notably job creation, graft eradication, and welfare.

# Personal Values

Chapter 1



# and Family



## **Marriage and Family**



# Half millennials identify themselves as part of the sandwich generation, showing increasing pressure to financial stability and mental health

Indonesian millennials find themselves caught between the needs of their older and younger generations. Half of the respondents, constituting 50%, identify with the term "sandwich generation," as they are responsible for caring both for their children and their aging parents. Another 15% specify that they are solely responsible for providing for their children, while 14% reveal that they do not have the obligations of caring for children or parents. This demographic dynamic illustrates the complex and diverse familial responsibilities that Indonesian millennials navigate, highlighting the challenges and

for a secondary demographic bonus, especially when the elderly remain healthy and productive, contributing to the workforce and economy. However, challenges arise when the elderly become unproductive and vulnerable members of the community, which the country is currently grappling with.

The potential benefits of an aging population are contingent on ensuring that the elderly population maintains good health and remains active contributors to society. Promoting access to healthcare, creating age-friendly work environments, and offering opportunities for continued learning and engagement are vital steps to harnessing the productivity and experience of the elderly population. social safety nets, healthcare programs, and support services that cater to the needs of this segment of the population. By focusing on both the potential benefits and challenges of an aging population, Indonesia can navigate this demographic transition with a balanced perspective, leveraging the strengths of its elderly citizens while safeguarding their well-being and quality of life.

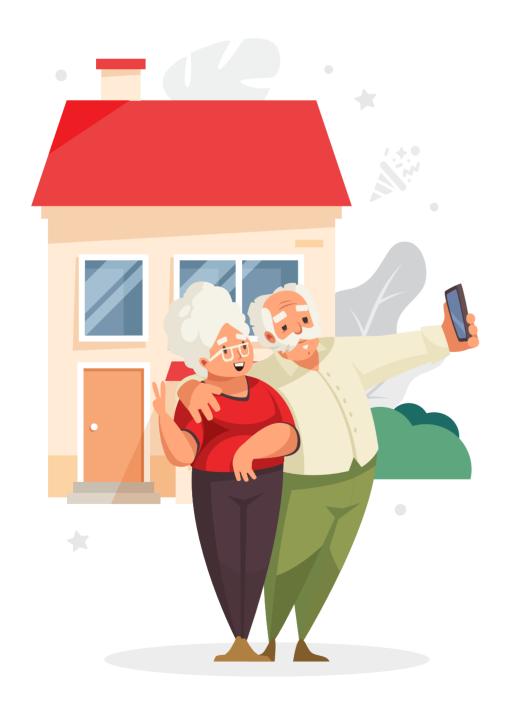
multifaceted roles they assume within their families.

According to Statistics Indonesia in its 2022 report on the elderly, as of 2021, Indonesia has transitioned into an aging population phase, meaning that 1 in every 10 citizens falls within the elderly category. The aging population presents an opportunity

Conversely, addressing the challenges associated with unproductive and vulnerable elderly individuals requires a comprehensive approach. This includes developing

# Financial constraints keep millennials at their parents' home

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.

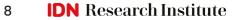


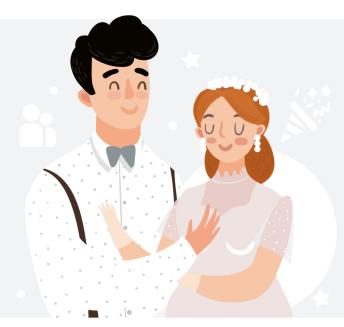
In our supplementary survey, which focused on the living conditions of 50 millennials and their family arrangements, a significant proportion revealed that their living situation involved extended family members. More specifically, over half of the respondents (30 out of 50) reported residing with their parents, in-laws, and other extended family members. The reasons behind this arrangement were primarily financial in nature.

The majority of those living with extended family members explained that their financial circumstances influenced their living decisions. For some, this was due to their responsibility of financially supporting their family members, while others cited the arrangement as a result of receiving financial support from their family. These financial dynamics underscore the role that economic considerations play in shaping living arrangements for millennials, highlighting the complex interplay between familial support systems and financial independence – especiall in the context of Indonesia.

Understanding these family dynamics provides valuable insights into the challenges and motivations that influence millennials' living situations. As they navigate financial responsibilities and support networks within extended families, these factors contribute to the diverse array of living arrangements observed

#### among Indonesian millennials.





## Marriage is a question of when, not if, for most Indonesian millennials

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

In our supplementary survey involving 51 millennial respondents, 24 individuals indicated that they have never been married. The majority of these millennials expressed a desire to get married, with only one person stating that they do not intend to marry.

Financial capability emerges as the

We believe that this trend is connected to the reality that many Indonesian millennials find themselves in the role of the sandwich generation, needing to be prepared to provide for both their parents and their future children.

Another factor that millennials consider important when contemplating marriage is family background. This is particularly significant due to the prevalence of multigenerational households in Indonesia, where extended family members often coexist under one roof. As a result, the suitability of family backgrounds becomes an important consideration, given the potential complexities of living arrangements and shared responsibilities within these extended family units.

Among the 51 respondents in our survey, 26 millennials reported being married, with one individual having previously experienced marriage (as a divorcee). An intriguing trend has emerged wherein women are no longer solely responsible for domestic labor. Out of these respondents, 12 mentioned that household tasks are predominantly carried out by their female spouses, with male partners providing assistance. Additionally, 8 respondents stated that domestic responsibilities are evenly divided between both partners. Only three individuals indicated that the domestic workload falls entirely on the female spouse. One respondent mentioned having a domestic worker to assist with household tasks, while two respondents highlighted the involvement of family members in sharing household labor. This shifting dynamic underscores a more balanced approach to domestic responsibilities within millennial marriages.

However, despite these evolving dynamics, a noteworthy observation is that out of the 23 female respondents who are married, 16 expressed feeling overwhelmed by domestic responsibilities. This suggests that while there might be a sharing of actual household tasks, there remains a possibility that certain emotional labor or care work continues to disproportionately fall upon women. This highlights the persistence of gendered roles and expectations within the domestic sphere, which can contribute to feelings of imbalance and strain even when the tasks themselves are divided more equitably.

foremost factor that millennials take into account before entering marriage. Our supplementary survey also revealed that certain millennials consider factors like the their personal readiness, career progression and selfactualization, as well as values and beliefs when contemplating marriage.

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## Millennials as parents: Drone parenting and Sharenting

Millennials are actually a generation going through a digital transition, according to child psychologist Vera Itabiliana Hadiwidjojo, S.Psi. "They can find a lot of information about children and parenting on the internet, but they are often surprised by internet usage, leading to information overload and peer pressure among fellow parents," said Vera.

Millennial parents don't want their children to struggle or feel uncomfortable, so they tend to be more accommodating, practicing what's known as "drone parenting." This means they watch from a distance but intervene when there's a problem.





### "The parenting priorities for millennial parents include ensuring their children's happiness and being more open to their choices and preferences."

- Vera Itabiliana Hadiwidjojo, S.Psi. Child Psychologist

Millennial parents typically know what they want, but they may not always know how to achieve it. They have a lot of knowledge about modern parenting, but sometimes they have to follow their own parents' advice because they live together as the "sandwich generation." This isn't necessarily a bad thing because certain values should protect their privacy rights. Millennial parents should also be cautious about their digital footprints and consider privacy when posting memories of their children online.

When giving children access to the internet, millennial parents should consider factors like

and traditions still need to be passed down to their children.

When it comes to parenting and social media, millennial parents often use social media for showcasing their parenting achievements or daily content about their children – a phenomenon dubbed as "sharenting" (a portmanteau of share and parenting). However, they should be mindful of their audience. While children have rights, they may not always be able to voice them, so parents age-appropriate content, emotional regulation concerning short-form content, and age restrictions set by different platforms, following guidelines from reputable sources. The American Academy of Pediatrics (AAP) recommends that children should have no screen time at all until they reach 18 to 24 months of age, with the exception of video chatting. For kids between the ages of 2 and 5, the AAP advises limiting screen time to one hour or less per day.



## Millennial parents put safety first for their children, regardless of spending power

The additional survey findings indicate that an overwhelming majority of Indonesian millennials aspire to have children. This underscores that the concept of being childfree is not prevalent or aligned with their perspectives on marriage and family.

A similar pattern emerges in terms of childrearing arrangements among our respondents. Out of the 22 individuals who have children, 9 indicated that the mothers are primarily responsible for childcare, with fathers contributing to assistance. Additionally, 6 respondents reported an equal sharing of childrearing responsibilities between parents. In 4 cases, mothers handle childcare on their own. One respondent mentioned utilizing the assistance of a domestic worker for childrearing duties, and two respondents noted the involvement of family members in helping with their children. This pattern echoes the dynamic observed in domestic labor, underscoring a shifting yet not completely balanced distribution of caregiving responsibilities within millennial families.

Each parent respondent confirmed that they engage in daily activities of studying and playing with their children. Among them, 13 out of 22 parents take on the responsibility of transporting their children to daycare or school and picking them up. Additionally, 11 parents involve their children in daily domestic tasks as part of their routine. This hands-on involvement underscores the active role that parents play in their children's education, upbringing, and daily lives, reflecting a commitment to nurturing their overall development and wellbeing.

Inquiring about weekend and school vacation activities, we found that the most prevalent engagement is centered around creative pursuits at home. This is closely followed by trips to shopping malls or parks, as well as visiting other family members. Notably, nearly one-third of respondents mentioned allowing their children to watch TV or YouTube during these periods. These diverse activities highlight the range of experiences parents offer to their children, combining both indoor and outdoor adventures, social interactions, and moments of relaxation and entertainment.

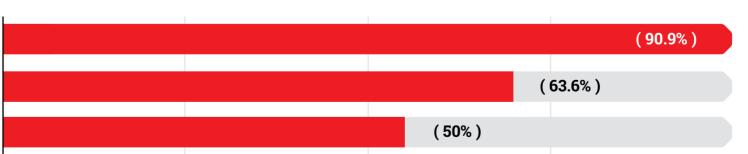
#### Safety first, price second

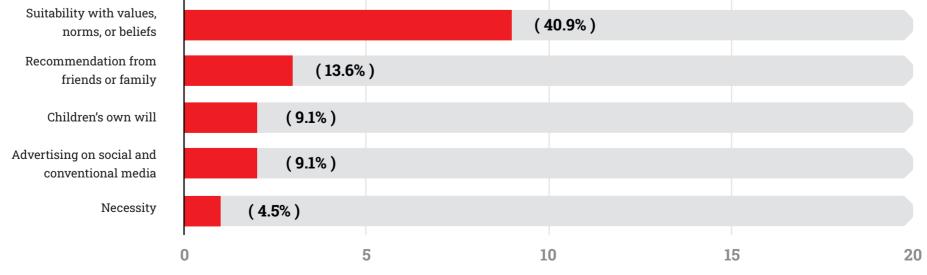
What are the most important factors in choosing food or products for children?

Safety and health (including nutrition)

Affordability and promotion or discounts

Eco-friendly materials or ingredients





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





In our inquiries about their aspirations for their children, all parents expressed a common desire for their offspring to grow up in good health and become independent adults. A majority of respondents, comprising more than half (13 individuals), expressed the desire for their children to achieve greater success than themselves in the future. This aspiration reflects the hopes and ambitions parents hold for the next generation, aiming for their children to surpass their own accomplishments and attain higher levels of achievement.

Only two respondents articulated the hope that their children would eventually support and care for them financially in their later years. This shift in perspective highlights a changing awareness among Indonesian millennials, demonstrating an understanding that they should not become a burden to their own children. This change reflects a departure from the traditional sandwich generation trend, where millennials prioritize ensuring the well-being of both their aging parents and their own children.

### Mental health is a growing problem among Indonesian children, but not everyone can access professional help

All parents unanimously prioritize their children's mental health. When questioned about their awareness of bullying at school, 7 parents acknowledged that their children have experienced bullying. On the other hand, 3 parents expressed confidence in the safety of their children's environment, stating that it is free from bullying. The remaining respondents were uncertain about the prevalence of bullying, indicating a need for increased vigilance and awareness regarding this important issue.

However, the PISA (Program for International Student Assessment) study in 2018 reported that as many as 41% of Mada University (Indonesia), The University of Queensland (Australia), and Johns Hopkins Bloomberg School of Public Health (United States). The research involved professionals from Indonesia, Australia, and the United States.

According to this survey, only 4.3% of parents or caregivers stated that their adolescent children required assistance concerning mental health issues. Among those who acknowledged their children's need for support, a mere 16.7% (or 1 in 6) of parents or caregivers confirmed that their adolescents' needs were being met.

15-year-old Indonesian students have experienced bullying at least a few times within a month. This places Indonesia as the fifth highest among 78 countries in terms of this issue.

A recent survey, the Indonesia National Adolescent Mental Health Survey (I-NAMHS) of 2022, offers a more nuanced understanding of parents' perspectives on child mental health. This survey was a collaborative effort involving researchers from Faculty of Medicine, Public Health, and Nursing of Gadjah However, almost half of the respondents (43.8%) reported refraining from accessing services or assistance. This decision was often driven by the desire to address the issues independently or with the involvement of family and friends.

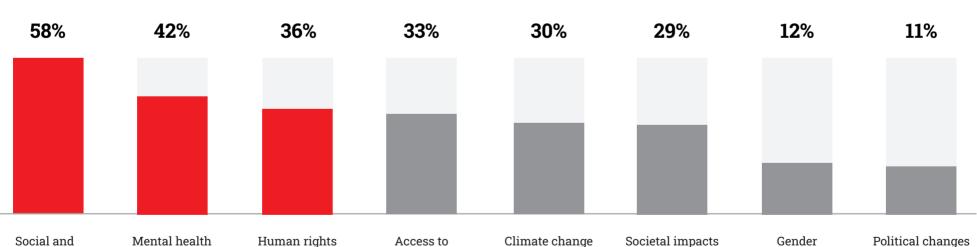
Many of the respondents also lacked awareness about where to seek assistance (19.2%), believed that their adolescents could improve on their own (15.4%), or faced financial difficulties in paying for services (13.6%).





#### Inequality, mental health, and social justice are millennials' top concerns, as climate change and gender inequality lurk behind

In our inquiry into the concerns of Indonesian millennials regarding socio-political issues, the results reveal a range of priorities. The largest portion, more than half at 58%, identified social and economic inequality as a prominent concern. Mental health and well-being closely followed at 42%, while human rights and social justice were noted by 36% of respondents. Access to education garnered concern from 33%, climate change and environmental degradation were significant for 30% of millennials, while societal impacts of technological development became concerns for 29% of millennials. Notably, gender inequality and political changes appeared to be of lesser importance, resonating with only 12% and 11% of the millennial respondents, respectively. These diverse levels of concern underscore the multifaceted nature of millennials' engagement with socio-political issues, reflecting a complex interplay of personal experiences and broader societal factors that shape their perspectives and priorities.



#### What is millennials' biggest concern?

economicand well-beingand social justiceeducationand environmentalof technologicalinequalityand meaningfulinequalitydegradationdevelopmentparticipation in politics

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



While gender equality may not be a top priority for millennials compared to other issues, feminism has gained acceptance among many people. 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.

#### Winner takes all: Inequality is a big concern for millennials

Indonesian millennials are deeply concerned about the prevailing issue of social inequality, which encompasses a broad spectrum of disparities including economic, educational, and societal gaps.

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. This rising inequality has captured the attention of Indonesian millennials, as they recognize the significance of addressing these disparities for the betterment of society as a whole. 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 fastestgrowing 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. 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.

Indeed, the issue of social inequality transcends national boundaries and generational divides. The World Social Report 2020, published by the UN

The prominence of social and economic inequality among the concerns of Indonesian millennials

# Mental health is not a menial problem for millennials

The data from our survey underlines the significance of mental health as a prominent concern among Indonesian millennials, with 42% 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.

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

...



Even though mental healthcare 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.



### **POPBELA**.com

POPBELA.com as a part of IDN Media has observed that millennials and Gen Z play a crucial role in reducing the stigma surrounding mental health issues through digital media platforms. They openly discuss their mental health issues and support others who are struggling with them.



"One of the primary ways millennials are combating stigma is by sharing their own stories about mental health issues. They share these stories on social media, blogs, and other platforms. These narratives help break down myths and stereotypes about

mental health problems. They also demonstrate that mental health issues are common and can affect anyone."

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

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.



### '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 36% 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 millennials 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.





36%

### **Indonesian millennials** acknowledge the importance of human rights.

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, **36% of Indonesian millennials acknowledge the importance of human rights. However, in the same survey, a significant 87% of millennials 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.



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

In an additional survey involving 50 millennials, it was found that 46% of respondents are contemplating furthering their own education. A significant 78% expressed concerns about the future cost of their children's education.

The issue of education costs has become a prominent concern among Indonesian millennials. Only 24% believe that everyone can access quality education, while 46% believe that scholarships or additional financial support are necessary, and 30% 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.



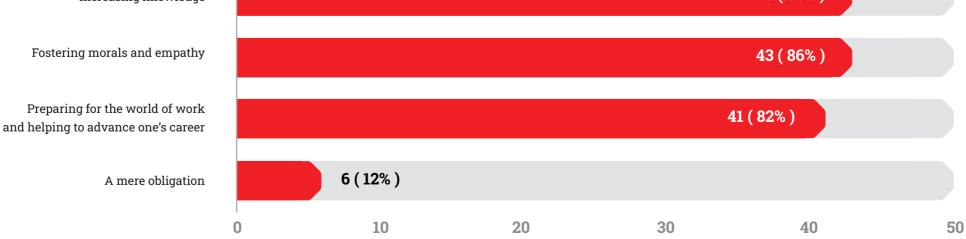
## What is the essence of education for you?

Cultivating critical thinking and critical thinking skills

Increasing knowledge

45 ( 90% )

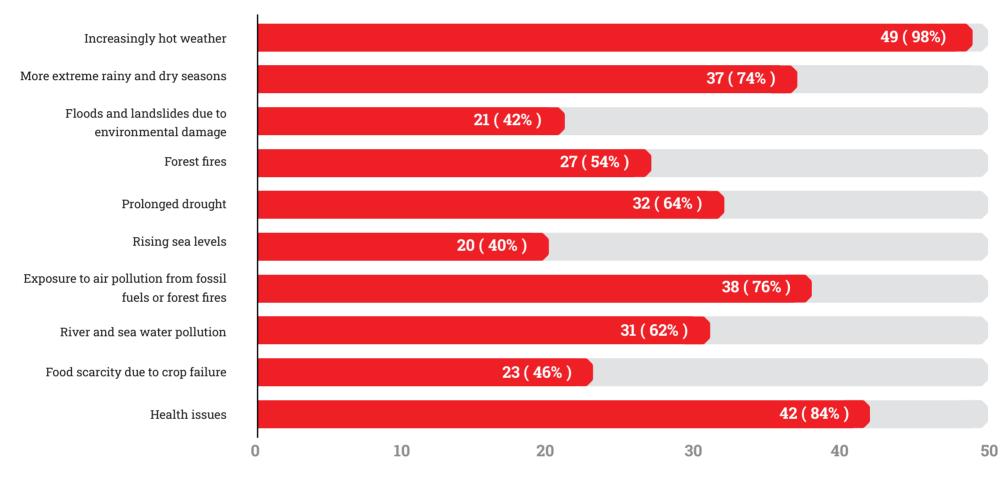
43 (86%)



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

# Directly impacted by climate change and environmental degradation, Indonesian millennials are changing lifestyle and demanding systemic changes

## 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%.

In an additional survey with 50 respondents, an overwhelming majority (90%) expressed climate change should be taken as a serious concern. Furthermore, 92% agreed that both government and corporations must implement structural or systemic changes to mitigate climate change, as opposed to 8% who believed individual efforts alone would suffice.

saving practices. Additionally, 68% of respondents expressed willingness to pay extra for eco-friendly or sustainable products.

These perspectives on climate change among Indonesian millennials 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.

This indicates that Indonesian millennials view climate change as a collective challenge requiring broader action beyond individual responsibility.

However, these millennials 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-



# Education

Chapter 2



# and Career



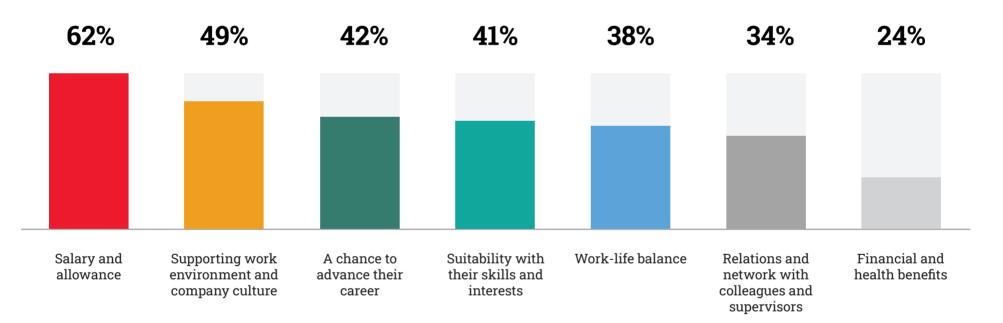
## **Career Preferences**

### Salary is millennials' first priority in career

Absolutely, the priorities of millennials when it comes to choosing a job have evolved beyond just salary. While compensation remains a crucial factor, millennials are increasingly valuing other aspects of their work environment and overall career experience. A positive work culture that promotes collaboration and open communication is not only conducive to their well-being but also enhances their job satisfaction.



## What do millennials look for in a workplace?



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

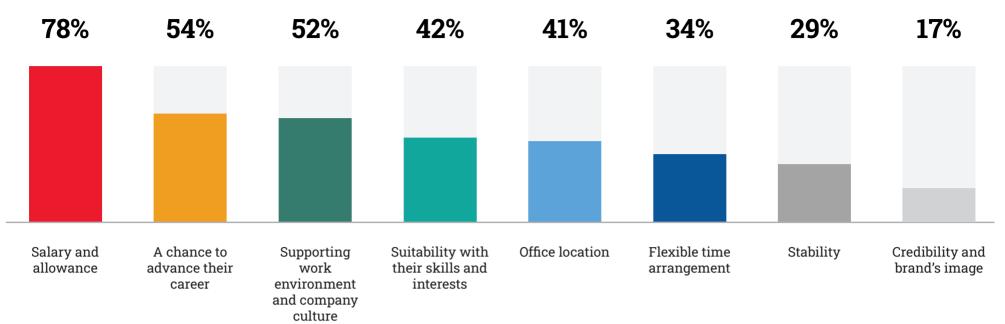
Salary indeed plays a pivotal role, as it not only affects

#### The emphasis on a positive work environment

job satisfaction but also has a direct impact on an individual's financial stability and ability to meet their financial obligations and goals.

The significance of career growth opportunities is paramount. Millennials are driven by the desire to continually improve their skills, advance in their roles, and develop professionally. A lack of these prospects can lead to frustration and a sense of stagnation, which can prompt them to explore new job opportunities. underscores the importance of workplace culture. Millennials value collaboration, respect, and open communication in fostering a supportive atmosphere that boosts their motivation and productivity. An organization that prioritizes these aspects is more likely to retain millennial talent and contribute to their overall well-being and job satisfaction.

#### 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 selfimprovement and mental health. Millennials recognize 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.



"Millennial leaders also tend to focus more on technology, Environmental, Social, Governance (ESG) issues, and positive impacts. Generally, they don't hesitate to implement changes when they assume leadership roles, as they continue the leadership legacy."

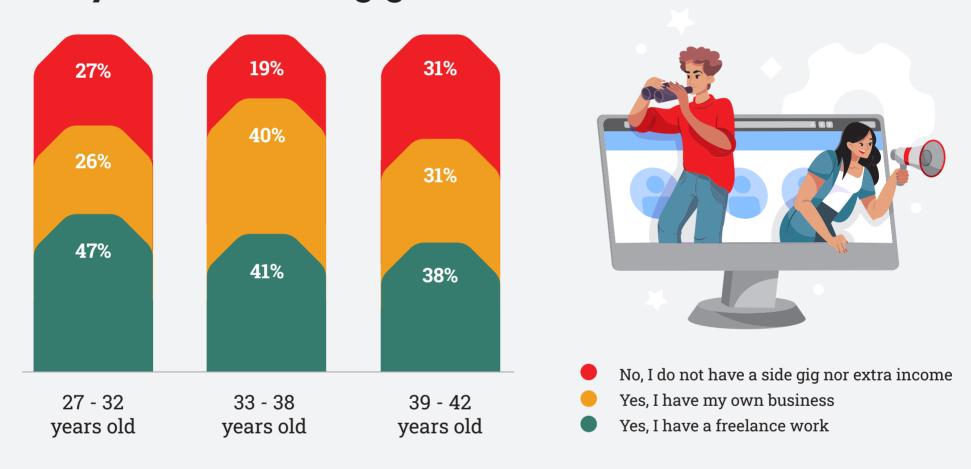
- Hendra Soeprajitno Editor-In-Chief of FORTUNE Indonesia

Hendra Soeprajitno, Editor-In-Chief of FORTUNE Indonesia, has noted that Indonesian

millennial leaders exhibit a unique leadership style compared to the previous generation. He mentioned that although not all millennials fit this description, some are more willing to take risks. "Millennial leaders also tend to focus more on technology, Environmental, Social, Governance (ESG) issues, and positive impacts. Generally, they don't hesitate to implement changes when they assume leadership roles, as they continue the leadership legacy," said Hendra.

## Hustling provides extra income for older millennials as financial pressure increases

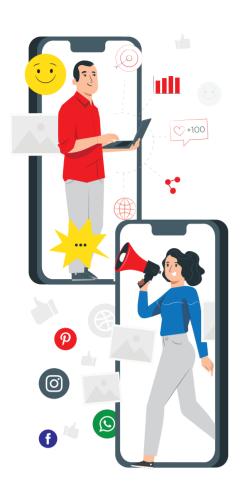
As millennials advance into older age brackets, there is a discernible trend of heightened involvement in supplementary employment or alternative income sources. This inclination can be attributed to the progression of millennials' careers and their accumulation of experience, prompting them to explore 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 millennials, who have amassed substantial 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?

In the context of Indonesian millennials, 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, 21% stated that their side gig contributes an additional 25-50% to their primary income. For 26%, the contribution is below 25%. Conversely, a mere 9% reported that their side gig surpasses 50% of their primary income, with an even smaller 3% 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 millennials 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 millennials





- Hana Novitriani Vice President of ICE

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.

"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 livestreams, like IDN Live, or through special 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 January 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 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," 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.



# Media Consumption and Online Behavior

Chapter 3





## **Social Media Behavior**



### Social media as a personal, social, and political platform for Indonesian millennials

Indonesian millennials, though not digital natives, have rapidly adopted digital tools and platforms over the past decade and moreover since the COVID-19 pandemic. Improved internet accessibility, affordable smartphones, and the rise of homegrown tech companies are key drivers behind this transformation.

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.

This accelerated adoption has led to the majority of respondents saying that they spend around 1–6 hours on social media daily. In our survey, 12% 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 (8%) and even more than 10 hours (3%) – leading to the "chronically online" moniker.

How chronically online are Indonesian millennials?

















Close to one-third of the respondents primarily utilize social media for accessing news and acquiring new information. Meanwhile, 13% 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.

The outcomes of our survey, revealing extensive social media use and diverse activities, have led us to conclude that social media, regardless of the specific platform, has evolved into a multipurpose platform for Indonesian millennials. This online environment serves as an escape from the demands of home, work, and other responsibilities. Indonesian millennials also frequently turn to social media as a platform to express their political apprehensions and criticize government actions.





- **Prabhakar Raghavan** Senior Vice President at Google

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.

As social media continues to evolve and integrate various functions, it reinforces its status as a significant digital realm that transcends mere communication. It has become a dynamic space where Indonesian millennials unwind, connect, and explore, making it an integral part of their daily lives and digital experiences.



#### Still doing it for the 'Gram

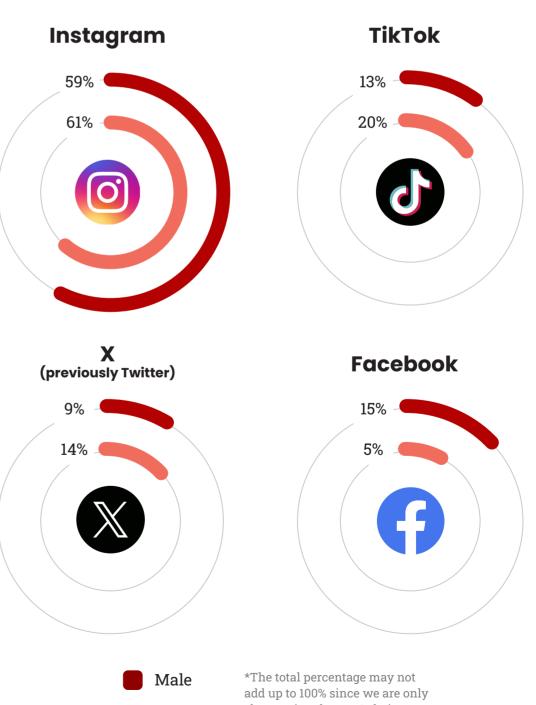
Among Indonesian millennials, Instagram stands out as the most popular social media platform, with 59% of them using it regularly. It maintains its position as the top daily social platform for both male (59%) and female (61%) millennials. Instagram's popularity can be attributed to its diverse content offerings, including photos, videos (including Reels), livestream, messaging and articles, which appeal to 57% of the respondents who enjoy all these types of content. As a result, Instagram has become a one-stop platform catering to various preferences and interests within the Indonesian millennials.

TikTok is emerging as a significant player in the Indonesian millennial social media landscape, becoming the second most used platform. This app has garnered particular interest from female, with 20% of female respondents actively using TikTok, compared to 13% of male respondents. Its popularity among millennials, especially among female users, indicates a growing trend towards short-form video content and interactive features, making TikTok a formidable competitor to other social media platforms in the Indonesian market.

### Instagram is still popular with TikTok on the rise

A notable 13% of our respondents indicate that they are still using Twitter, which has recently been rebranded 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 millennials, akin to their global counterparts, appear to be experiencing a lovehate relationship with Twitter (ahem, X) following Musk's takeover, resulting in ongoing engagement with the platform.

A significant 9% of our respondents reveal that they continue to use Facebook, with a higher proportion of male users compared to female users. Indonesian



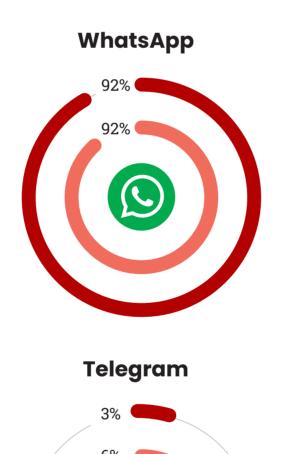
millennials appear to be retaining their presence on the platform due to its community-based features, such as Groups and Fanpages, which foster engagement and connections within their respective interests and communities. Despite the rise of newer platforms, Facebook's community-centric approach continues to resonate with this demographic, contributing to its sustained popularity among Indonesian millennials.

Female

showcasing the top 4 choices.

## WhatsApp: One app to rule them all

WhatsApp maintains its dominant position as the most popular messenger app among Indonesian millennials, **with an impressive 92% of respondents confirming their usage.** In comparison, only a small fraction, 5%, utilize Telegram, while 2% prefer Line, and 1% each for Discord and Facebook Messenger. WhatsApp's popularity extends beyond personal communication, with many millennials 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 multipurpose communication platform for the Indonesian millennial population.





\*The total percentage may not add up to 100% since we are only showcasing the top 2 choices.



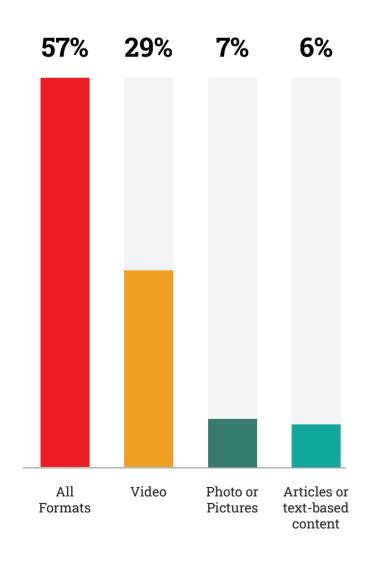
# Rise of short-form video content

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 millennials claim to prefer watching video content whereas only 7% prefers visual based articles and 6% prefers reading articles. The rest watches a combination of the three.



# Indonesian millennials 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 longform 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 millennials remain largely unconcerned about personal data protection. Across all socio-economic backgrounds, awareness of personal data security remains low. An overwhelming 88% of millennials express comfort with the current state of affairs, while only a minority of 12% 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 millennials to address the prevailing complacency towards data privacy.

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

**19.56** 

customers of BPJS Ketenagakerjaan Indonesia (Indonesia's Workers Social Security Agency) **1.5** terabytes (TB)

of personal data of Bank Syariah Indonesia (BSI) users million

data records from MyIndiHome users 34.9

personal data records from Indonesian citizens' passports

The lack of concern among Indonesian millennials 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 millennials and all citizens to be vigilant about their data privacy. 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

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. 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 laxed 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

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

consequences of such actions.

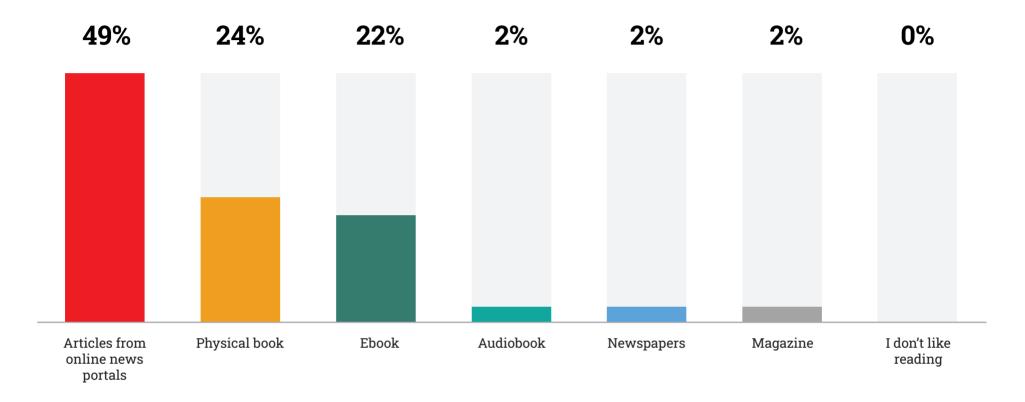
The impact of doxxing on victims can be devastating, leading to privacy violations, harassment, online bullying, and even offline repercussions. The practice not only violates personal boundaries but also has broader implications for society, including the erosion of trust in online platforms and the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

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.

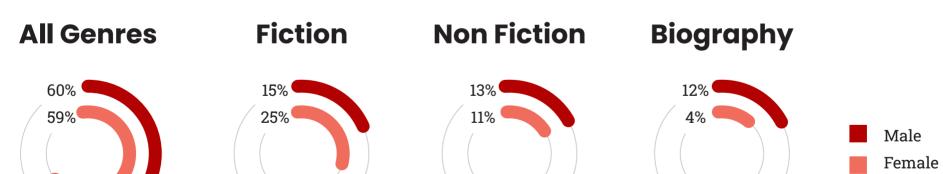


## **Reading Behavior**

It's hardly surprising that millennials exhibit distinct habits compared to older generations. Rather than subscribing to newspapers for their morning news fix, millennials are turning to online media articles. While some still engage with physical books, a growing number of millennials are embracing ebooks and even redefining reading by opting for audiobooks.



Millennials show 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 millennials, irrespective of gender, express an affinity for reading across all genres.



A discernible trend emerges where the highest socioeconomic group exhibits the greatest adoption of digital books. This trend could be attributed to the relatively high entry barrier for e-book reading, with some individuals needing to invest in digital book readers like Kindle or Kobo, and the majority of digital books being available in English. Nevertheless, the presence of locally developed platforms like Gramedia Digital and the National Library app, accessible via smartphones, is contributing to the rising popularity of digital books among millennials.

# Literacy rate: It's not the people, it's the access to books

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.

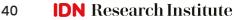
Even Tangerang, which is in close proximity to Jakarta, is facing difficulties in maintaining its libraries. According to observations by beritatangerang.id, no library staff can be seen at the Batuceper Subdistrict Library in Tangerang City. The space appears neglected, covered in dust with shelves and books showing signs of disarray. Afdel, a volunteer at the Batuceper Subdistrict 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 subdistricts of Tangerang City. "So, out of the 13 subdistricts, only 7 have functioning libraries. And even those are not running at their full potential," he stated.

Mulyanto, the Chairman of the Indonesian School/

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.



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 on October 17, 2021, in Jakarta, explaining that school libraries have yet to be recognized as an integral part of enhancing education.



# Entertainment, Hobby, and Leisure

Chapter 4



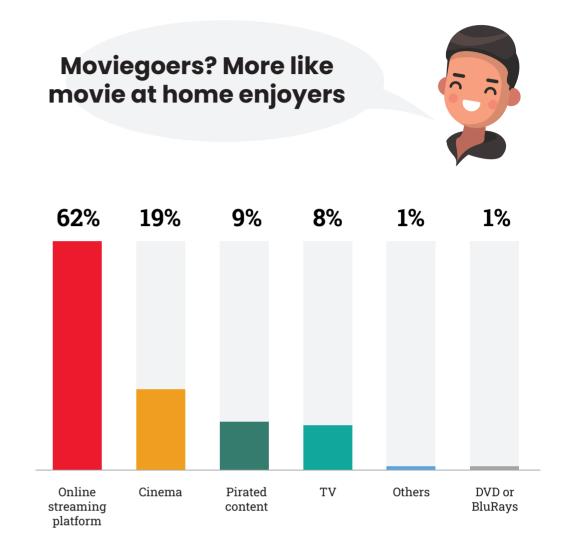


## **Movie Watching Behavior**

## **Cinemagoers no more?** Millennials are the "we have cinema at home" generation

Streaming platforms are the hottest trend for Indonesian millennials, proving that they're all about "Netflix and chill" when it comes to watching movies.

Approximately 60% of millennials across various socio-economic backgrounds have embraced streaming platforms as their go-to choice for watching movies, with about 20% favoring the cinema experience. In contrast, only around 10% or fewer still resort to pirated websites, television, or alternative options. Furthermore, the survey has identified a noteworthy link between socioeconomic status and the inclination towards streaming platforms.

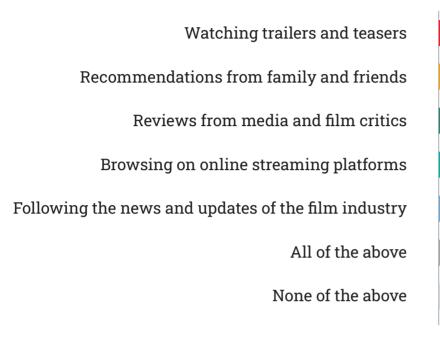


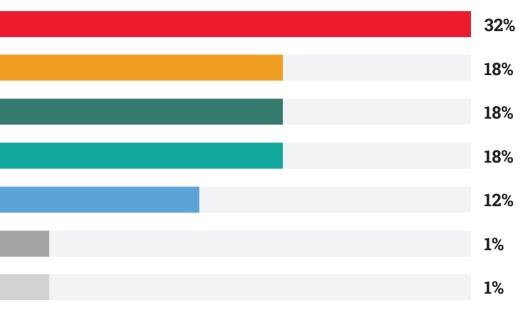
Age Group	Netfix	Disney +	Viu	Apple TV	Prime Video	Vidio	WeTV	MOLA	Others	Non User
<b>SEC A</b> (income of more than Rp 10 million)	54%	11%	9%	8%	6%	4%	1%	1%	2%	6%
SEC B										

(income of Rp 5-10 million)	64%	7%	4%	2%	3%	5%	2%	1%	0%	12%
<b>SEC C</b> (income of less than Rp 5 million)	43%	8%	9%	1%	2%	13%	2%	0%	3%	22%

### How do Indonesian millennials decide what they want to watch?

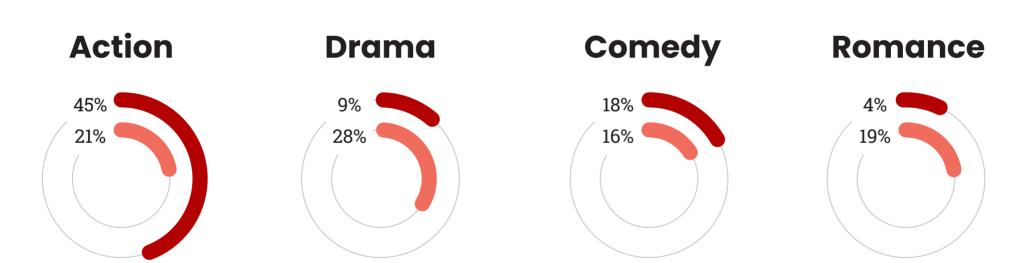
Indonesian millennials exhibit diverse methods of discovering movies. Approximately one-third of them watch trailers and movie scenes, while the significance of word-of-mouth recommendations from friends and family is on par with that of movie critics and media reviews. Additionally, they explore movie 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.

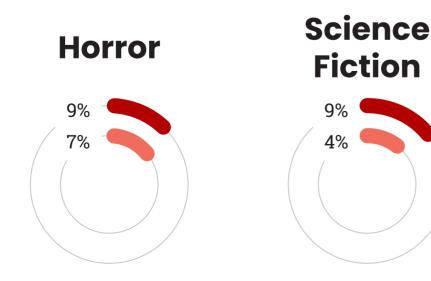




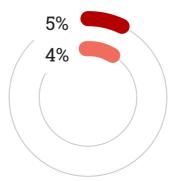
Among Indonesian millennials, action, drama, and comedy emerge as the most favored movie genres. Yet, a captivating trend is revealed when considering gender-related preferences. Notably, 45% of male exhibit a preference for action films, in contrast to 21% of female. On the other hand, 28% of female express a liking for drama, and 19% lean towards romance, while a modest 9% of male enjoy drama and merely 4% find romance appealing.













\*The total percentage may not add up to 100% since we are only showcasing the top 7 choices.







The genre preferences of millennials are strongly echoed in their choices of favorite actors, actresses, movies, and series, as evident from our survey findings. Notably, Reza Rahadian, known for his roles in dramatic films, emerges as the most popular Indonesian actor among millennials. Likewise, Iko Uwais, recognized for his appearances in both local and global action movies, holds a prominent spot among the favored actors within the Indonesian millennial demographic.

#### **Most Popular** Indonesian **Actor and Actresses**



**Reza Rahadian** 



**Putri Marino** 

lko Uwais





-0

**Pevita Pearce** 

### **Most Popular** International Actor and Actresses



**Tom Cruise** 



**Pedro Pascal** 



**Margot Robbie** 

**Jennifer Lawrence** 



**Michelle Yeoh** 

**Most Popular Movies** 





**Guardians of The Galaxy Vol.3** 



**Oppenheimer** 



**The Little** Mermaid



**John Wick: Chapter 4** 

#### **Most Popular** Korean Drama

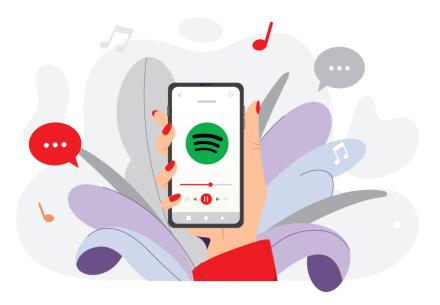


**The Glory** 

**A Time Called You** 

Celebrity

Mask Girl



## **Music Listening Behavior**

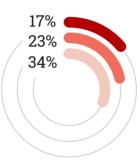
Spotify emerges as the favored music application across a broad range of socio-economic backgrounds, and the pop genre resonates as the most popular choice among millennials. The widespread popularity of Spotify could be attributed to its offering of both free and premium versions, catering to different user preferences. It's also noteworthy that the prevalence of pirated application usage cannot be discounted.

Spotify

55%

46%

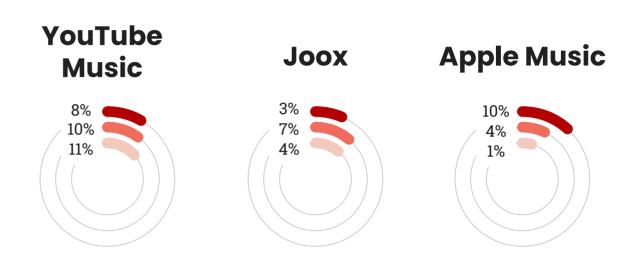
### YouTube



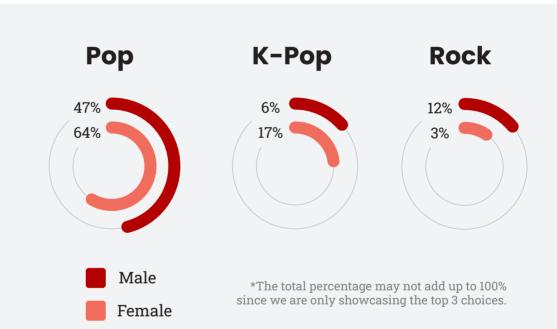
SEC A (income of more than Rp 10 million)
SEC B (income of Rp 5–10 million)
SEC C (income of less than Rp 5 million)

Curiously, a larger proportion of Indonesian millennials opt to listen to music on YouTube rather than the more audiofocused 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 millennials, commanding a 57% preference, closely trailed 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.



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



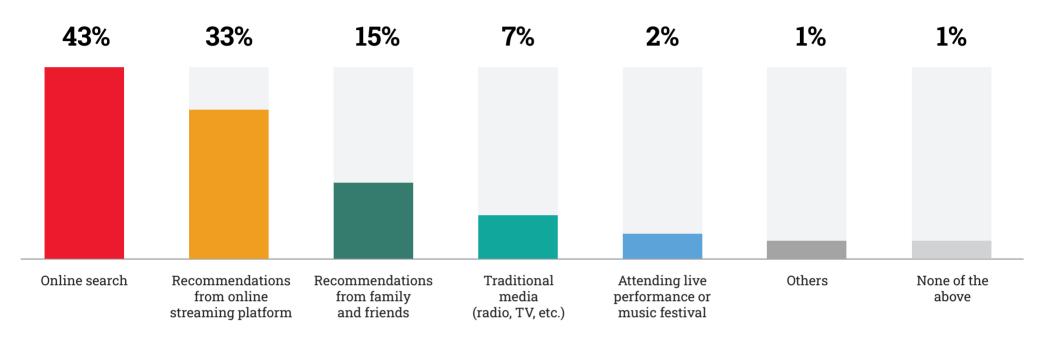
Contrary to the prevailing stereotype associating K-Pop listeners primarily with young females, our survey reveals that K-Pop enjoys a diverse audience of adult individuals spanning both genders. This phenomenon can be attributed to the prolonged and steady rise in K-Pop's popularity over the years. Notably, the segment of millennials who are passionate about K-Pop tends to possess higher disposable incomes compared to their younger counterparts from Gen Z. This indicates that K-Pop's appeal transcends age and gender boundaries, resonating with a wider demographic.

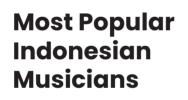




Millennials have integrated music into their daily routines, frequently engaging in music discovery and actively seeking out new songs through online searches. An interesting trend emerges, with a significant 33% of millennials expressing that they rely on music recommendations provided by streaming platforms. Surprisingly, this figure is double the 15% 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 millennials discover new music?







Raisa



Sheila On 7







-0

NOAH

### Most Popular International Musicians









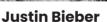




Beyonce

Taylor Swift

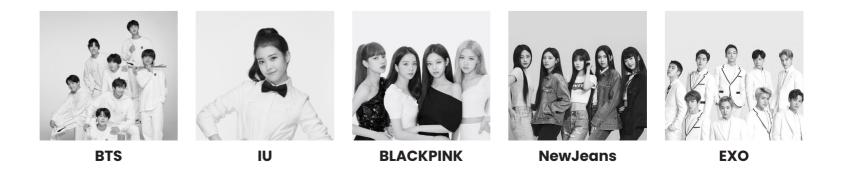
**Ed Sheeran** 





Drake

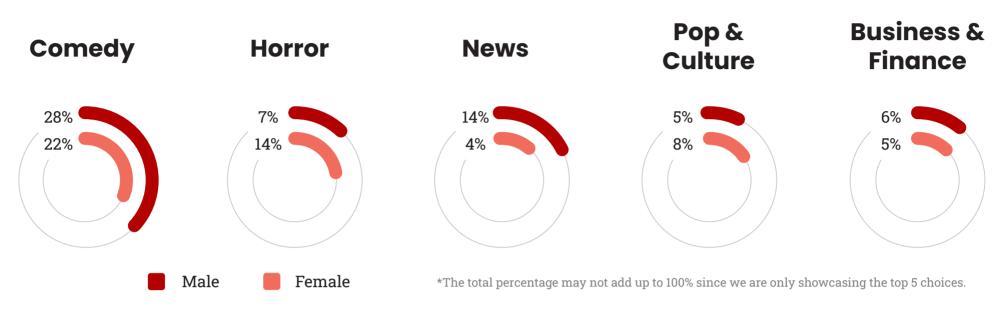
#### Most Popular K-Pop Artists



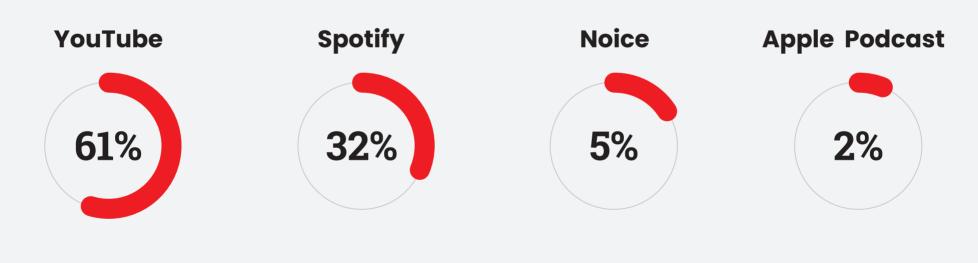
## Podcast Listening Behavior

The podcast phenomenon has firmly established its presence, with 56% of Millennials actively engaging in podcast consumption. The most popular podcast topics among them encompass a diverse range, including Comedy (35%), Horror (16%), News (11%), Pop & Culture (10%), and Business & Finance (8%). This interest is evenly spread across genders, highlighting the broad appeal of these topics among both male and female listeners.

### LOL: Indonesian millennials like comedy podcast



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.



## **Most Popular Podcasts**



### in Indonesia

Indonesian millennials 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 millennials. 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.





Close The Door

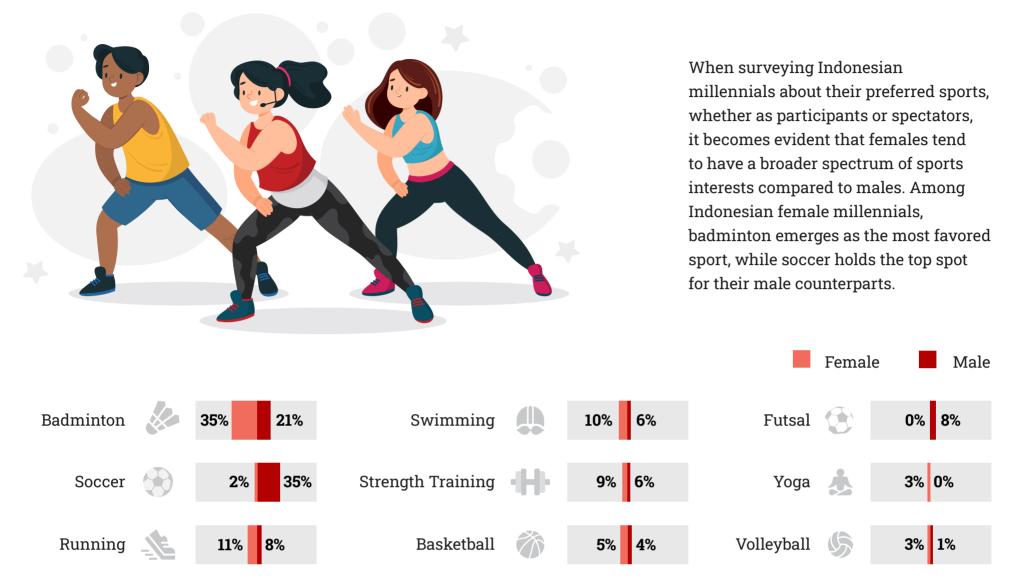
**Curhat Bang** 



VINDES



## **Health & Sport Behavior**

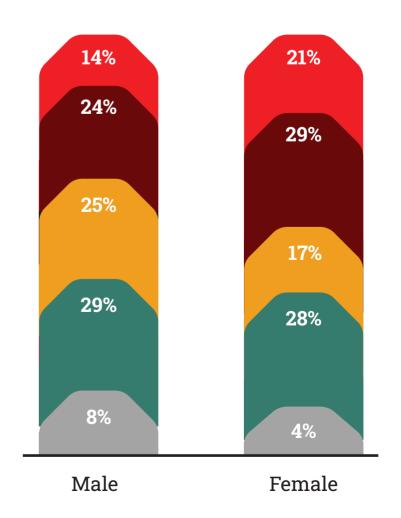


\*The total percentage may not add up to 100% since we are only showcasing the top 9 choices.

Among millennials 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, 6% of millennials incorporate exercise into their daily routines, while 28% do so a few times a week, 21% on a weekly basis, and 27% 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.

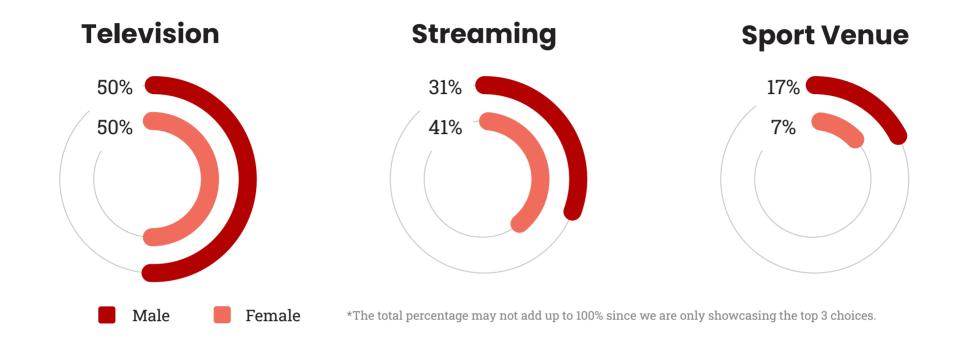
## How often do Indonesian millennials exercise?



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

More than half of the millennials express a preference for watching sports from the comfort of their homes via TV or streaming platforms. Among these, approximately 37% opt for streaming platforms as their favored means of consumption. Conversely, a mere 10% of millennials indicate a preference for attending live sports events, and this demographic is predominantly comprised of males. 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.







**Anthony Ginting** 



Kevin Sanjaya Sukamuljo



Bambang Pamungkas





**Evan Dimas** Darmono



**Greysia Polii** 

### Most popular **Indonesian athletes**

Indonesia's adoration for badminton is vividly evident in the fact that the most beloved Indonesian athletes are exclusively 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



**Lionel Messi** 

**Cristiano Ronaldo** 

**Viktor Axelsen** 



**Kento Momota** 





Within the realm of international athletes, Indonesian millennials have exhibited a strong affinity for badminton players, with three out of the top five most revered figures hailing from this sport. Interestingly, the leading two positions are occupied by soccer luminaries Lionel Messi and Cristiano Ronaldo. Interestingly, Serena Williams becomes the fifth most popular international athlete, which aligns with the recent surge in popularity of tennis in Indonesia.





## When millennials 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.

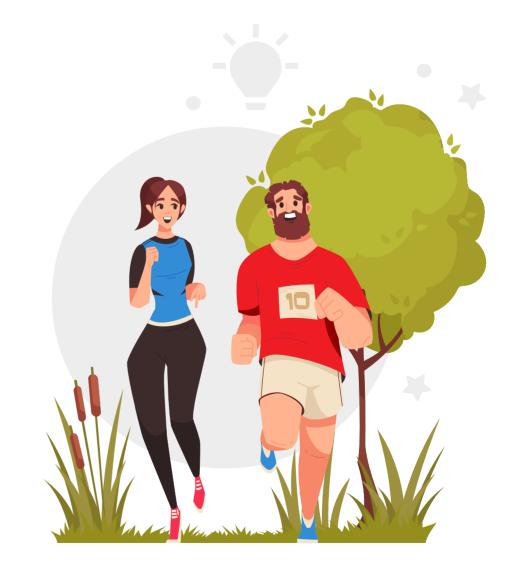
The notion of exercise as a means to sustain their physical appearance and boost their self-assurance is a significant factor.

Many millennials view exercise as a way to connect with likeminded 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.

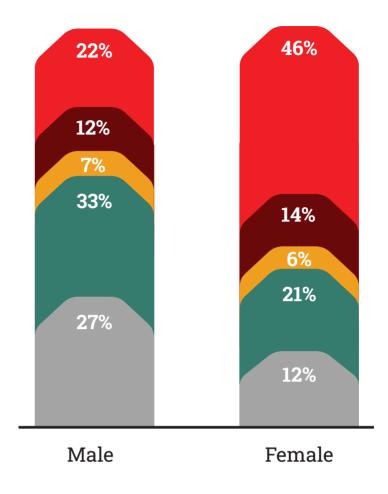


## Gaming Behavior

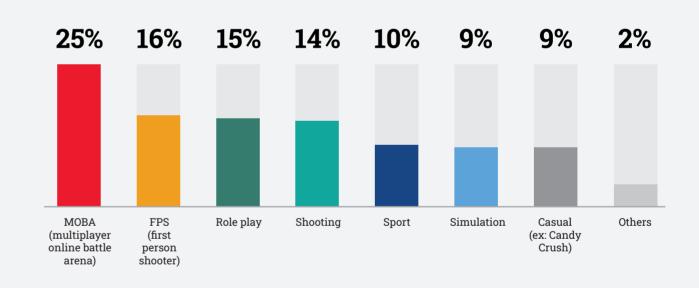
Roughly 19% of millennials reveal a daily penchant for playing games. Interestingly, a notable gender gap becomes evident, with a substantial 78% of males displaying a preference for gaming, compared to 54% of females. Among those who engage in gaming, the majority (74%) opt for mobile phones, while PC gaming constitutes 18%, and console gaming makes up 7%.

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

## How often do Indonesian millennials exercise?



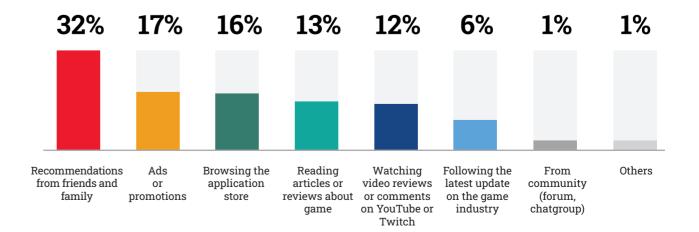
A quarter of millennials, accounting for 25%, have a penchant for playing games from the MOBA (multiplayer online battle arena) genre. This preference is closely followed by other genres like FPS (first person shooter), role play, and shooting, which also rank as popular game choices among millennials. 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 millennials 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 games

Lemon



**Bang Alex** 





**Jess No Limit** 



Most popular gaming influencers

MiawAug



-0

Windah Basudara





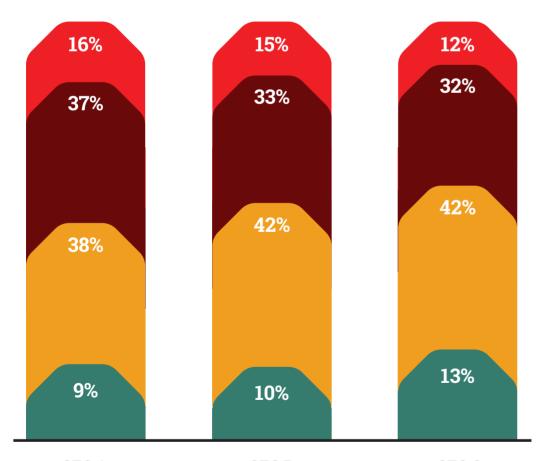


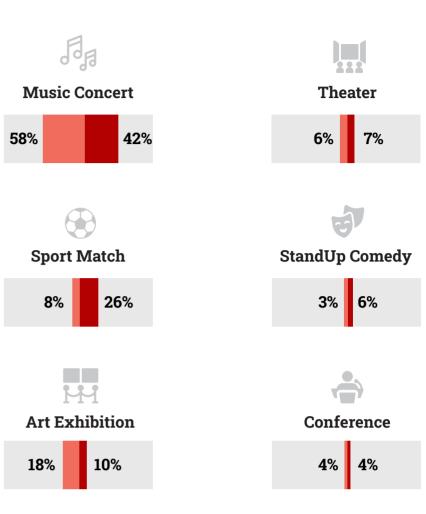
Male

## **Live Event Behavior**

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 millennials. Following closely, the second most favored event for male millennials is sports matches, while female millennials 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.

Female

## How often do Indonesian millennials attend a live event?

The findings from our survey underscore a notable trend: individuals from higher socio-economic backgrounds tend to participate in live events more frequently compared to those with lower incomes. 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.

SEC A (income of more than Rp 10 million) SEC B (income of Rp 5–10 million) SEC C (income of less than Rp 5 million)

Never

Few times in a year

Once in a year or less

Monthly or more

Another contributing factor to the socio-economic 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, those with higher incomes may find it more feasible to cover these supplementary expenses, while individuals with lower incomes might encounter financial constraints that limit their ability to partake in such events.

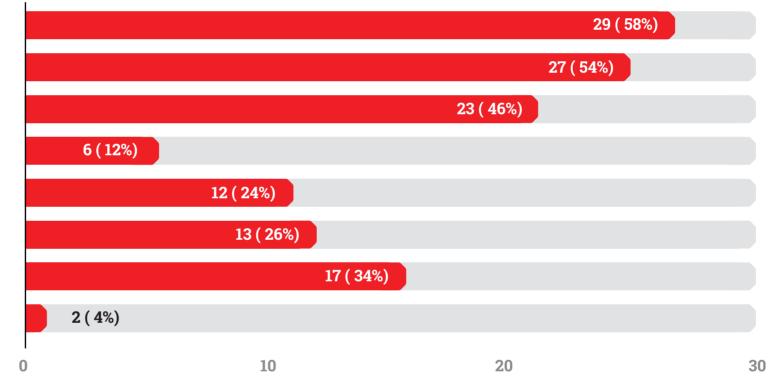


## 'Calo' and Ticket Wars are the new normal in Indonesian live events

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

In our additional survey of 50 millennials, 52% stated that they rarely or almost never participate in ticket wars for concerts or music performances. Only 4% 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 millennials, 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 millennials fight in ticket wars for exclusivity



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

How much I enjoy the work of the artist/musician

How rare the opportunity to see the artist/musician is

The uniqueness of the live performance or event

Reviews and recommendations from friends or online sources

The sense of exclusivity when attending a sold-out event

The potential for social media engagement and sharing experiences

Ticket affordability

Never



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 group 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:





Coldplay

#### 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. (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**

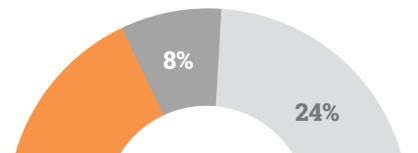
Traveling for vacation has become an affordable luxury for Indonesian millennials, as it is both accessible and yet not something everyone can indulge in.

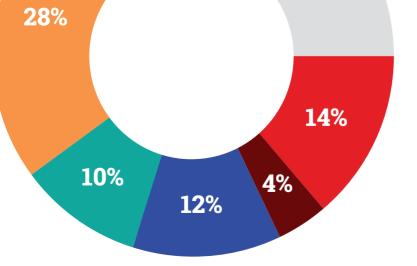
According to an additional survey of 50 Indonesian millennials, 64% travel for vacations a few times a year, 20% travel once a year, and the remaining rarely travel. Domestic destinations remain the top choice for the majority of millennials in our survey. Additionally, most prefer shorter vacations lasting between 2 to 7 days. The reasons Indonesian millennials budget for travel include a desire to explore new destinations and have unique experiences (54%), utilizing their days off or study breaks (20%), saving funds specifically for travel (18%), and seizing opportunities for special moments such as winter trips or seasonal festivals.

### Indonesian millennial: Healing on a budget vacation

## 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

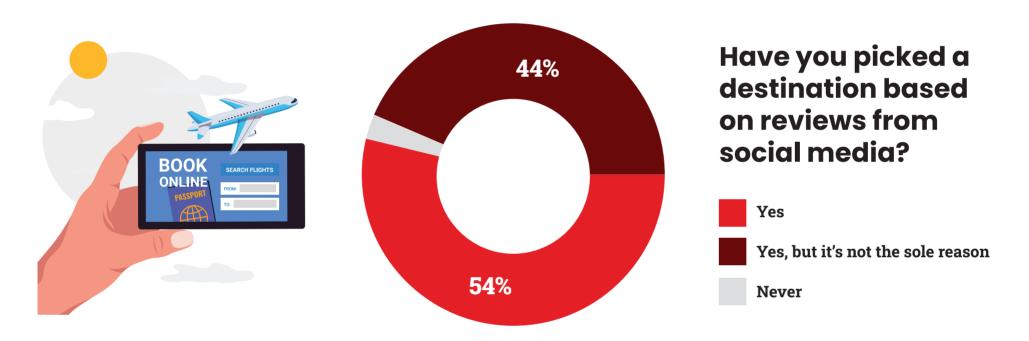
Options depending on the budget



### **Discovering not-so hidden gems**

88% of Indonesian millennials in our additional survey express a willingness to prioritize lesser-known destinations over popular ones. They seek unique experiences offered by these hidden gems (64%), value cultural authenticity (24%), and appreciate the opportunity to contribute to the local economy (10%). These millennials firmly believe that tourists should leave a positive impact on local communities.

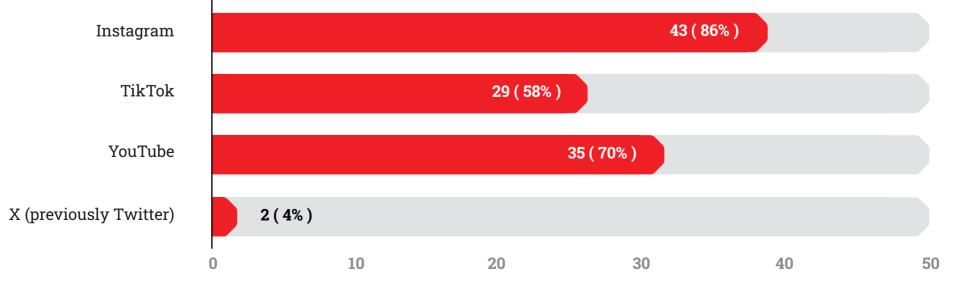
The belief that travel significantly benefits local economies has gained traction, especially in the aftermath of the COVID-19 pandemic. During this time, well-known destinations such as Bali and Yogyakarta saw a decline in visitors, leaving locals grappling with a significant loss of income. Nevertheless, certain factors can still draw Indonesian millennials to well-known locations. For example, 90% 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 millennials' decisionmaking, creating a reinforcing cycle of popularity. 86% 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.



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

As Indonesian millennials use Instagram, search engines, and YouTube 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%.

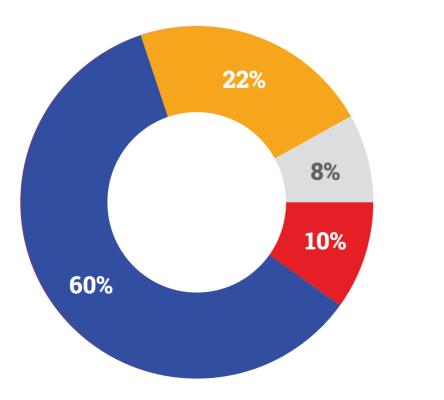
## Indonesian millennial travel for 'healing' and exploring hidden gems, local cuisines

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

26% of our respondents indicate that they have planned their vacations specifically around culinary experiences.
52% prioritize culinary experiences while also considering other factors. 16% say they don't consider culinary experiences a priority but still want to try local food.
Only 6% claim that culinary experiences don't matter to them at all.

An impressive 78% of our respondents incorporate culinary experiences into their travel itineraries, underscoring their commitment to exploring local cuisine. Moreover, a significant 90% of Indonesian millennials 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

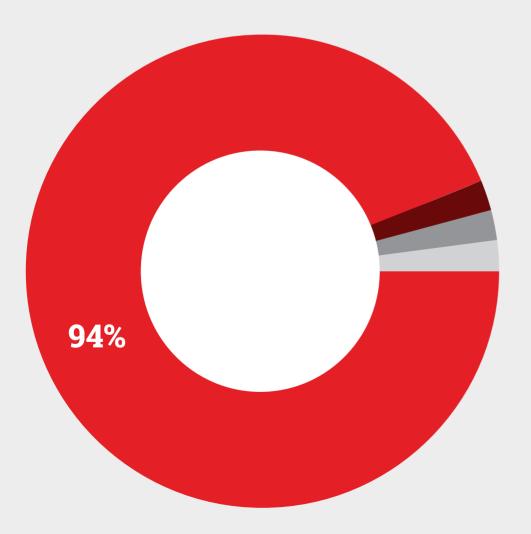


## Getting away from hustle and bustle to heal

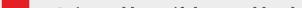
**84%** of Indonesian millennials in our survey view travel as a healing experience, a respite from the demands of their fast-paced lives. The opportunity to explore new places, cultures, and cuisines allows them to rejuvenate and recharge their spirits.

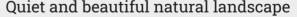
Travel provides a break from daily routines, offering moments of relaxation and reflection amid breathtaking landscapes and enriching encounters with local communities. Millennials see it as a chance to disconnect from the digital world, reconnect with nature, and foster personal growth. This perception 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 millennials?



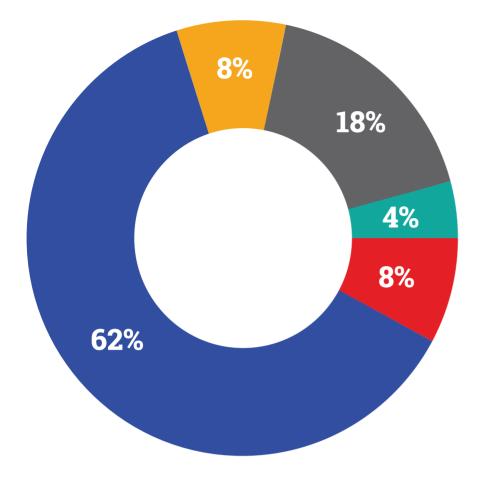


Spiritual or holy places

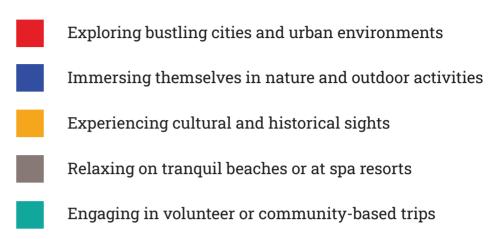
Destination with yoga and meditation places

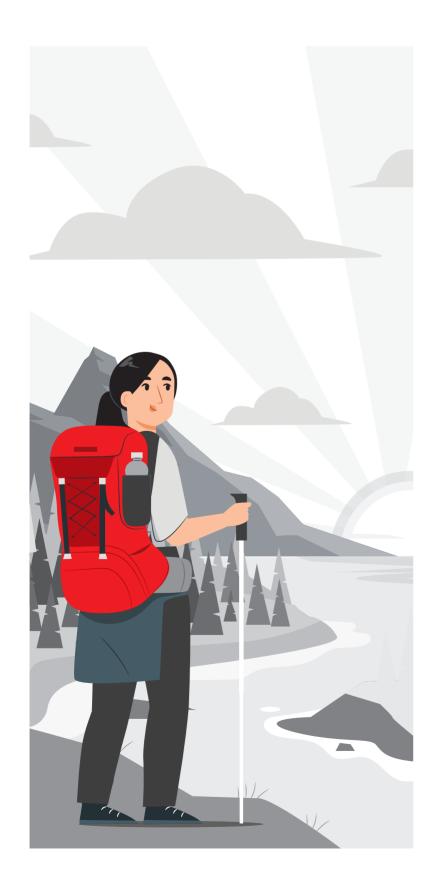
Places where you can be connected to local culture and tradition





### What activities interest Indonesian millennials the most during traveling?





It's intriguing to note that for Indonesian millennials, natural landscapes hold greater appeal compared to destinations emphasizing well-being-centered activities like yoga or spa treatments. Only 50% of millennials have chosen places offering such services, with 32% expressing interest but never having tried them, and 18% not considering them at all.

On the other hand, a significant 74% prioritize having relaxing accommodations, while 26% are indifferent to this aspect. This preference might be related to millennials' consideration of budget as a crucial factor in their travels, where accommodation costs often represent a substantial portion of their overall expenses.



# Finance and Shopping Behavior

Chapter 5





## **Financial Preferences**



## Indonesian millennials are earning less than Rp 5 million per month

The findings of our survey reveal a notable disparity in the monthly income of millennials. A significant 45% of respondents indicated that their monthly income is below Rp 5 million. Meanwhile, 39% reported an income ranging from Rp 5 million to Rp 10 million per month. A smaller 11% stated their income to be between Rp 10 million and Rp 30 million monthly. Additionally, 4% mentioned their income falling within the range of Rp 30 million to Rp 50 million per month. Merely 1% reported earning between Rp 50 million and Rp 100 million, while an equal 1% stated that their monthly income surpasses Rp 100 million. These statistics highlight the diverse income brackets that Indonesian millennials 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 millennials in this report (27-42 years old).

Age Group	Monthly income from formal sector
25 - 29 year old	Rp 2,773,639
30 - 34 year old	Rp 3,200,328
35 - 39 year old	Rp 3,360,450
40 - 44 year old	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 millennials living on a monthly income below Rp 5 million. The differing economic conditions and cost of living across provinces contribute to the notable income discrepancies observed among millennials in different areas of the country.





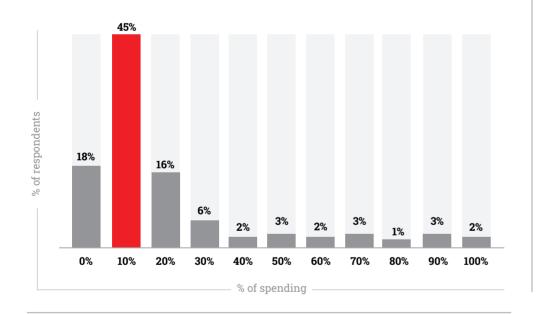
### Majority of Indonesian millennials spend their income on basic necessity, leaving little for health, self-development, and recreation

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 45% of millennials in our survey expressed that they allocate less than 10% of their income for health and insurance expenses, while a significant 18% 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.

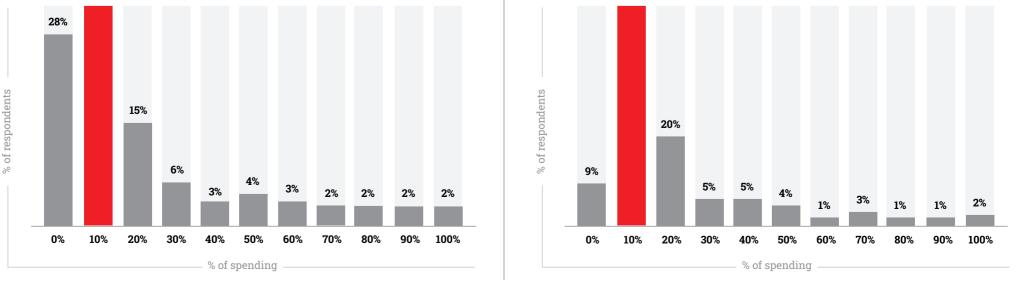


#### Health and Insurance

#### **Education and Self-Development**



### **Entertainment and Recreation**



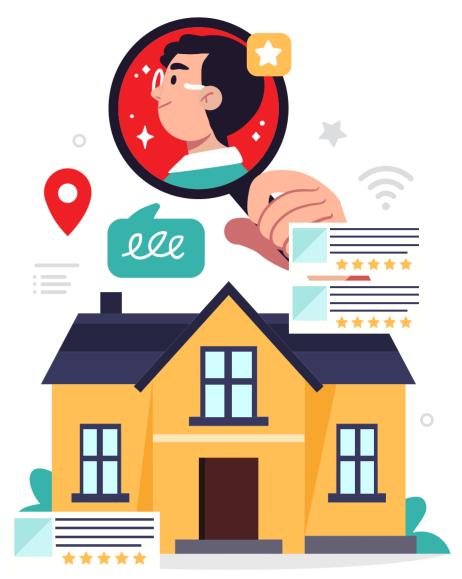
**IDN** Research Institute 65

05

## Millennials are taking baby steps toward financial stability, with budgeting and preparing for emergency funds

Among Indonesian millennials, purchasing a home and making investments stand out as the most prevalent financial aspirations. As they transition into adulthood and potentially find themselves shouldering additional financial obligations as part of the sandwich generation, many millennials are driven to attain enduring stability and augment their wealth through these predominant objectives.

The acquisition of a home holds immense significance for millennials. It signifies their yearning for stability, an avenue for investment, and a tangible sense of ownership. Possessing a home provides the avenue to cultivate equity over time and potentially reap rewards from appreciation in the real estate market. Millennials often perceive homeownership as a pivotal stride towards financial well-being and establishing firm connections within a community.



Age Group	27-32	33-38	39-42	
Paying Debts	10%	21%	27%	
Buying House	26%	19%	27%	
Starting a Business	18%	18%	8%	

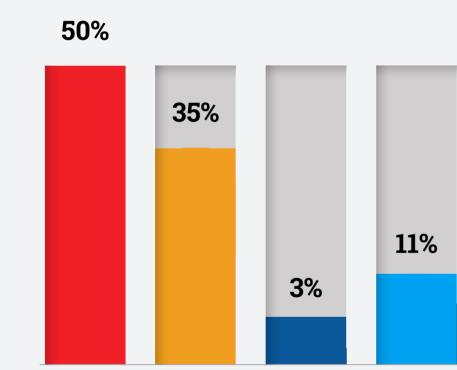
Investment	25%	20%	15%
Saving For Education	13%	12%	23%
Traveling	8%	8%	0%



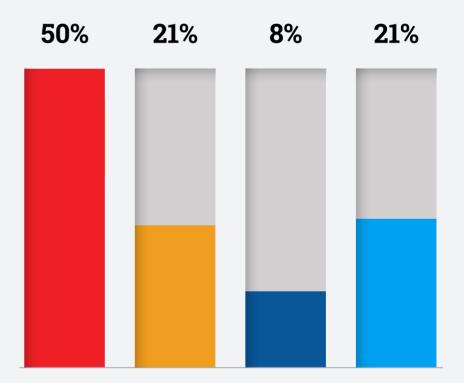
A mere 5% rely solely on chance for their financial outcomes, whereas 2% expressed uncertainty regarding their financial planning. This heightened awareness of financial planning could stem from the escalating social inequality, which impels individuals to adopt a more cautious stance in safeguarding their economic well-being. This shift reflects a proactive response by millennials, 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 millennials. An overwhelming majority, accounting for 85%, have taken the proactive step of establishing an emergency fund to handle unexpected situations. Additionally, a substantial 71% have ventured into investment activities, showcasing a robust engagement in pursuing financial growth and security.

### Do you have an emergency fund?



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



- 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

to help me achieve my financial goals

Yes, I have started an investment

- 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 millennials, 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 millennials. 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, they 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 job. 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 deposit 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



## Home sweet home: **Homeownership is still** the ultimate milestone for millennials

Homeownership holds paramount significance for Indonesian millennials, 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 millennials 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.

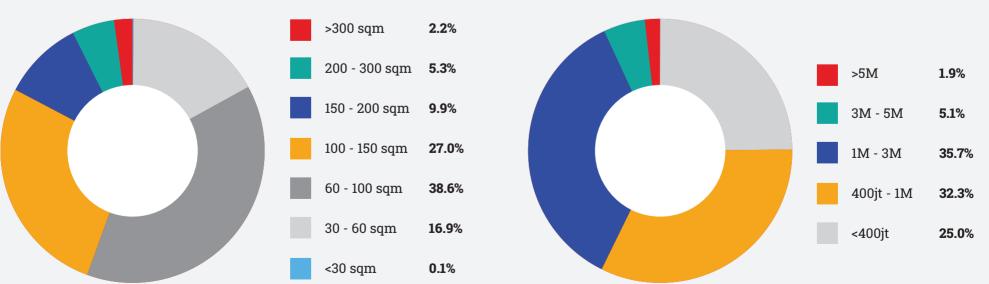
According to the findings from 99 Group, millennials show a strong preference for landed houses when searching for properties, with 64.6% favoring this type of property.



This is followed by 14.3% who prefer land, 9.4% who prefer apartments, and 8.5% who prefer shophouses. The most sought-after locations among millennials are major cities in Indonesia, with Jakarta leading at 61.4%, followed by Bandung at 11.3%, and Surabaya at 10.8%.

When it comes to property size, over half of millennials are looking for properties with less than 100 square meters. Additionally, more than half of millennials prefer properties priced below Rp 1 billion. Specifically, properties priced below Rp 400 million account for 25.0%, while prices ranging from Rp 400 million to Rp 1 billion make up 32.3%. Millennials are relatively flexible regarding the condition of the building, whether it's new or secondary.

## Millennials are looking for property under Rp 1 billion and less than 100 sqm

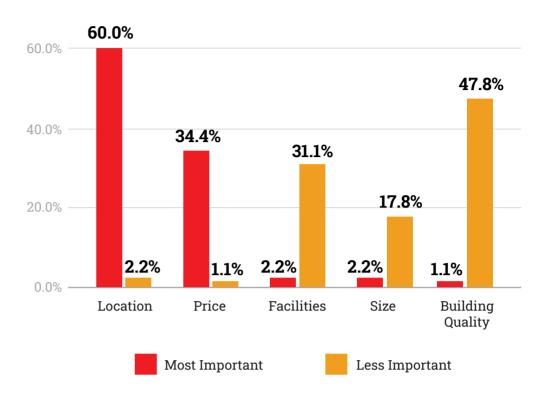




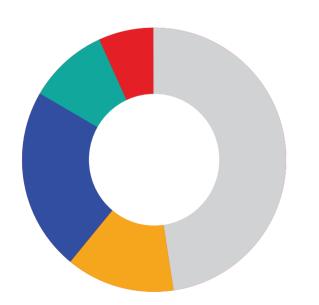
While the majority of millennials intend to purchase property for residential purposes (63.1%), financial motivations also play a significant role. About 18.5% of millennials view property as an investment, followed by 9.2% who seek property as an agent or co-broker, and 7.7% for business purposes.

In summary, the data from 99 Group suggests that millennials currently possess greater purchasing power and are inclined to consider properties with higher price tags compared to Gen Z. This may be attributed to the financial stability typically associated with older generations. Among the millennials surveyed, 89.2% opted for mortgage payments (KPA/KPR), 5.0% preferred installment methods, and 5.8% chose to pay in cash.

## The key factors influencing millennials' property choices are location and price



## Millennials are using digital platform to look for properties



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.

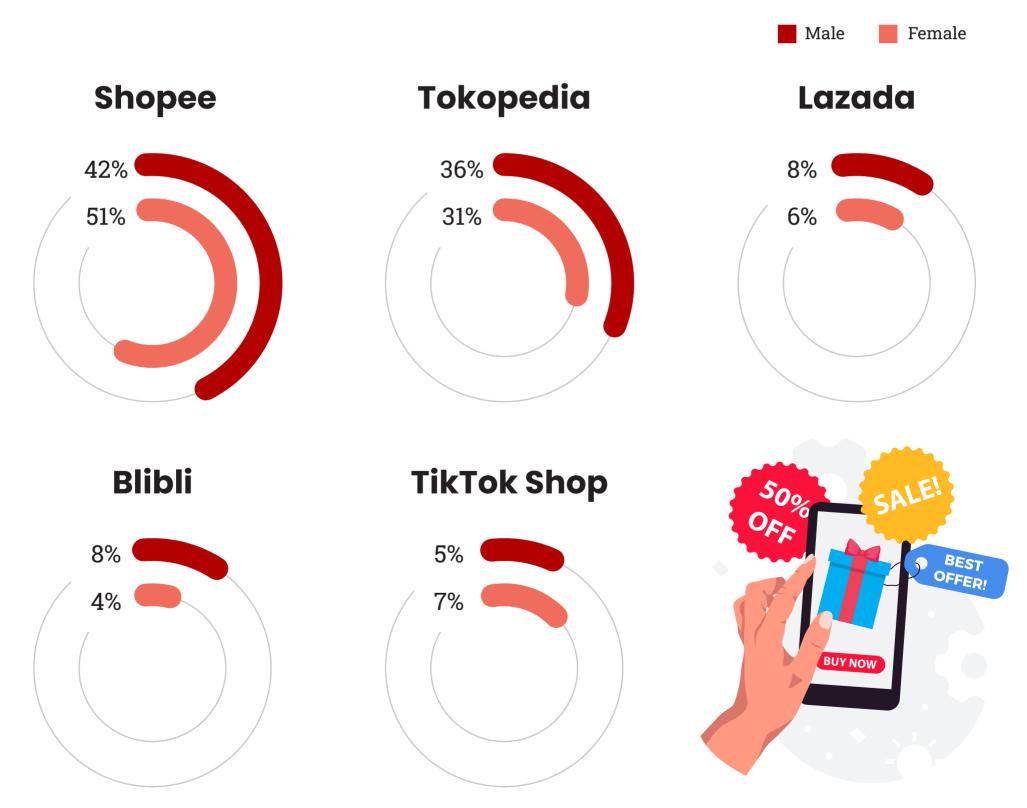


# **Shopping Behavior**



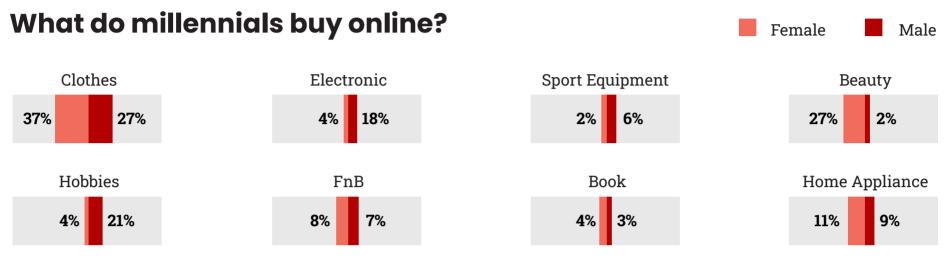
## Price and promotions are key drivers for Indonesian millennials to shop online

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 56.5% of millennials surveyed express their preference for online shopping on Shopee, with homegrown e-commerce platform Tokopedia closely following at 33.5%. Interestingly, the demographic breakdown reveals that Shopee garners greater engagement from women, while Tokopedia is favored by men. This dynamic highlights how each platform caters to distinct needs and offers varied products and services.



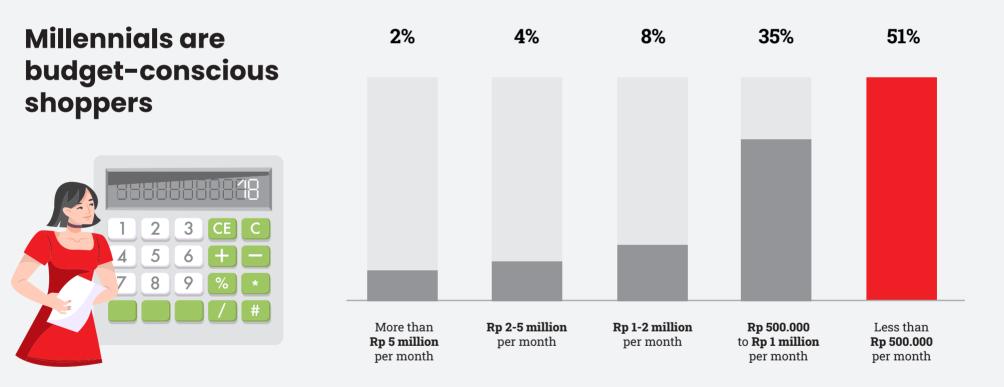
\*The total percentage may not add up to 100% since we are only showcasing the top 5 choices. \*The survey was conducted prior to the ban on TikTok Shop in early October 2023.

Within the realm of online shopping, distinct preferences emerge between female and male millennials. Female millennials tend to gravitate towards purchasing clothing and beauty products, reflecting a focus on personal appearance and self-expression. On the other hand, male millennials exhibit a proclivity for acquiring hobbiesrelated 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 millennials, 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 millennials 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 millennials, as well as their prudent financial approach to online purchases within a certain budget threshold.



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 millennials 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.

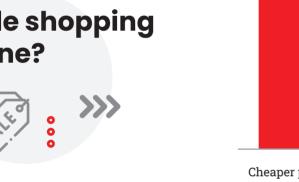


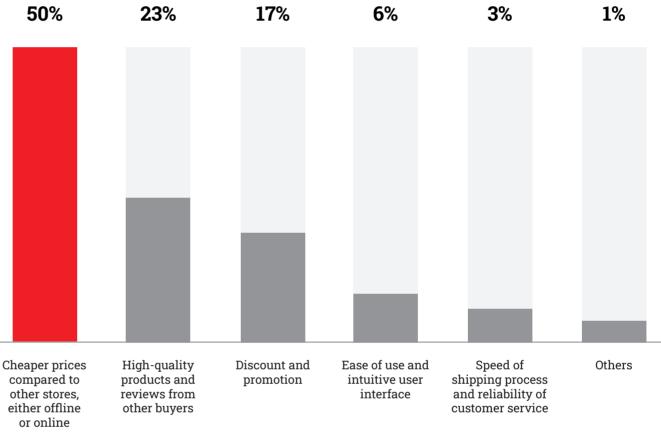
# Gratis Ongkir is the key to millennial shoppers' hearts

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 millennials take into considerations while shopping online?





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

26%	55%	15%	2%	2%





Affordable price and discounts

Ease and comfort of shopping from home More choices and varieties of products I don't like shopping at brick and mortar stores I am not sure (I have never shopped online or found the reasons)

## How to get into the Indonesian millennials' heart and mind (and wallet):

To resonate with Indonesian millennials and capture their attention, preferences, and purchasing power, consider the following strategies:





### Utilize Social Media, Apps, and Websites:

Leverage social media platforms, mobile apps, and websites to disseminate information about your products or services. Engaging and informative digital presence can help millennials discover and research your offerings.



### Prioritize Sustainability and Ethics:

Embrace environmentally-friendly, sustainable, and ethically-produced products. Millennial consumers tend to align with brands that exhibit a commitment to responsible practices.



### Leverage Influencers and Recommendations:

Seek endorsements and recommendations from credible individuals or influencers whose opinions and lifestyles resonate with your target audience. Positive endorsements can boost trust and engagement.



### Innovate with Technology:

Incorporate innovative technological features, such as digital payments, fast delivery options, and seamless online shopping experiences. Integrating cutting-edge tech can



### Align with Personal Values:

Cultivate a brand image that aligns with millennials' personal values. Brands embodying principles like sustainability, social justice, and diversity often attract like-minded



### Offer Discounts and Unique Business Models:

Employ discounts, promotions, or unique business models like subscriptions or shared purchases to grab millennials' attention. Novel approaches can intrigue and

### enhance the shopping journey.

consumers.

### engage them.



By embracing these strategies, businesses can connect with Indonesian millennials on a deeper level, resonate with their values, and establish a strong presence in their hearts, minds, and wallets.



# 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 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 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

"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 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. 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 millennials 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 millennials, 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.

"There have been several shifts in beauty standards influenced by current influencers in Indonesia: diversity, inclusivity, and a focus on health," Judith noted.







### Diversity

Beauty influencers today are more diverse in terms of race, ethnicity, and religion. This helps reflect the true diversity of Indonesian society.

### Inclusivity

Beauty influencers today are more inclusive in terms of body size, skin color, and facial features. This helps demonstrate that beauty is not limited to one specific standard.

### Health and Well-being Beauty influencers today focus more on skin health and well-being than on physical appearance. This helps promote a healthy lifestyle and encourages people to love themselves for who they are.



# Buy Now, Pay Later offers flexibility for millennials

"Buy now, pay later," or simply "Paylater," has gained significant popularity as a payment method among Indonesian millennials. In an additional survey with 50 respondents, 64% of millennials reported using the paylater feature.

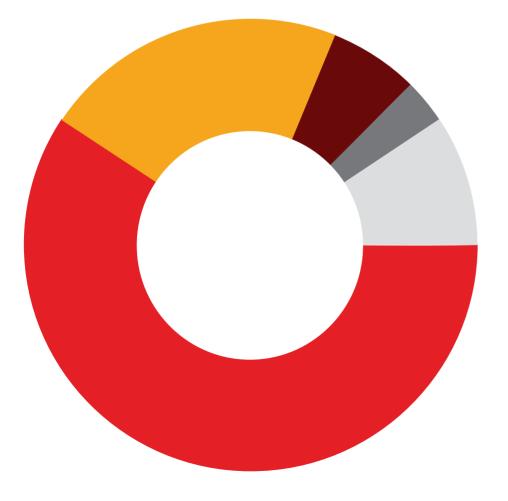
The reasons for Indonesian millennials using paylater are diverse. Some use it because they lack the budget at the time of purchase (40.6%), others want to take advantage of discounts or promotions (34.4%), some appreciate the flexibility it offers in managing their budget (21.9%), and a small percentage don't have credit cards (3.1%).

Interestingly, paylater services are employed for a wide range of expenses, from home appliances and fashion to food, drinks, and even utility payments such as electricity tokens and internet packages. Additionally, 84.4% of respondents have used paylater for emergency spending.

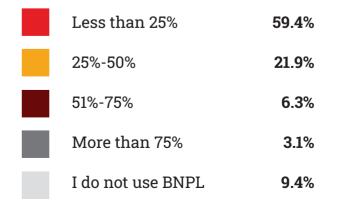
However, the majority of respondents (more than 50%) reported that paylater accounts for less than 50% of their total monthly spending.

Indonesian millennials use Buy Now, Pay Later (BNPL) for various purchases, but percentage of BNPL use is still low





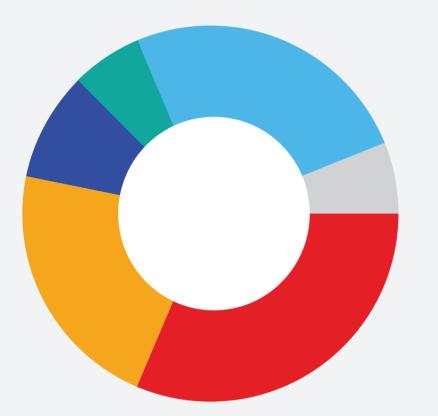
What is the percentage of Indonesian millennials' BNPL usage compared to total monthly spending?





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





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

0% interest or low fees	31.3%
Extended payment periods	<b>21.9</b> %
Access to exclusive products or services	9.4%
Integration with payment platforms options (e.g., digital wallets)	6.3%
Abundant promotions and discounts	25%
None of the above	6.3%

# Most popular Buy Now, Pay Later services in Indonesia





"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."



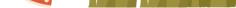
**Samuel Ray** Frugal Living Practitioner and Content Creator It's important to note that the flexibility of buy now, pay later can lead to more impulsive and frivolous spending. A majority (62.5%) of millennials in the survey stated that paylater enables them to make frivolous purchases. Furthermore, 75% expressed concerns that paylater could lead to excessive and impulsive spending. Respondents who do not use paylater often fear that this feature may lead to uncontrolled spending.

Interestingly, the surveyed millennials 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 56.3% 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."

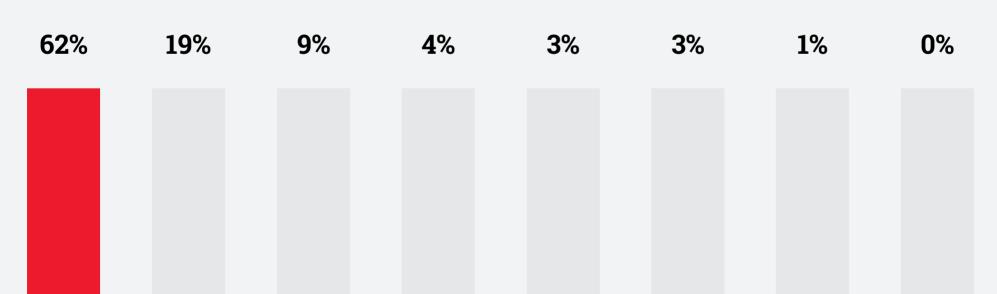
# Social media ads is the most effective and visible for millennials

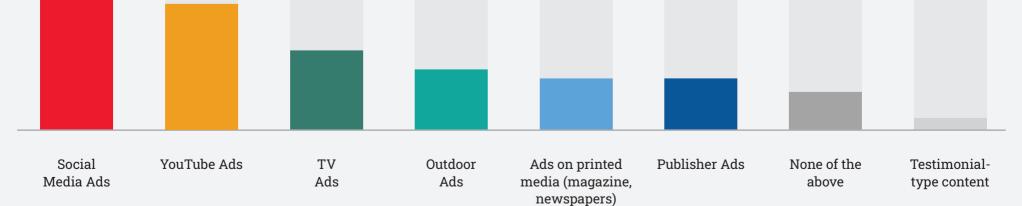
Digital advertisements play a significant role in shaping the shopping behavior of millennials. A considerable 54% of millennials acknowledge being moderately influenced by ads, while 31% concede that ads hold a high level of influence over their decisions.

Interestingly, despite the fact that 88% of millennials 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 thirdparty ad-blockers. Additionally, paid partnership content that isn't technically classified as ads can contribute to this phenomenon. Furthermore, the extensive time millennials spend 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?

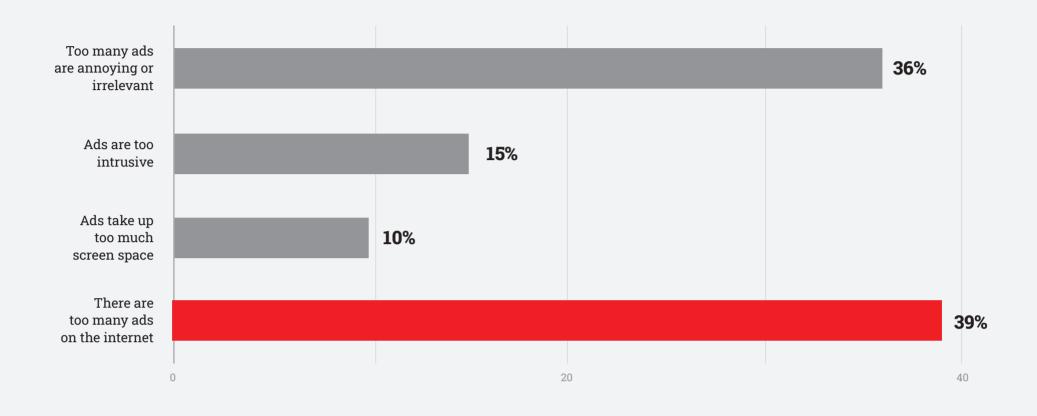






# Top 4 Ad-Blocking Motivations (% of millennial ad-blockers who block ads for the following reasons)

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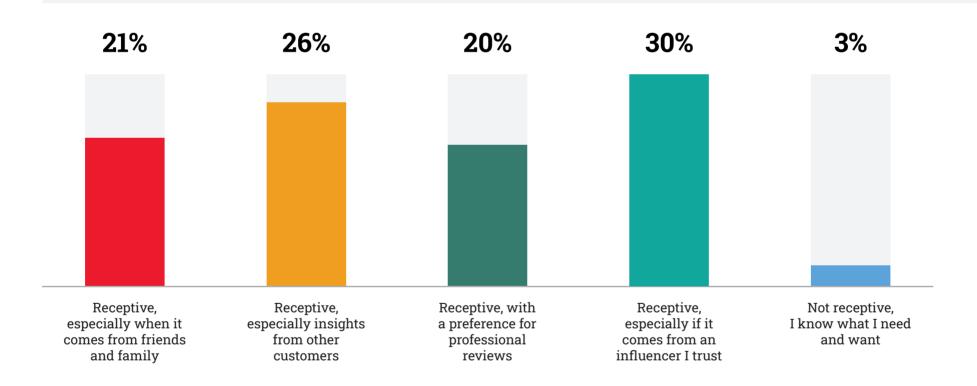
The parasocial relationships cultivated through social media create an environment where individuals are more susceptible to the influence of content, whether it's advertising or organic content. This is particularly true when the content is presented in a personalized and relatable manner.

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 by IDN Media team reveals that millennials 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.

# Influencers, customers review, and word of mouth are compelling for Indonesian millennial shoppers

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.



# Political

Chapter 6



# Landscape



# **Political Landscape**

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

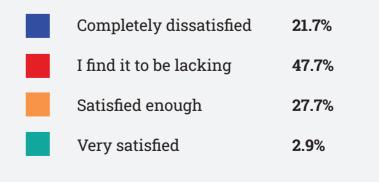
Millennials and Gen Z are set to dominate the votes in 2024 elections, according to General Elections Commission (KPU). Out of 204 million voters, 46.8 million are Gen Z and 66.8 million are millennials.

IDN Media team conducted a survey to 300 millennials to understand their perspective on the upcoming elections and views on Indonesian political landscape. We find a pervasive dissatisfaction in Indonesian democracy today among millennials, with 21.7% saying that they are completely dissatisfied, 47.7% say that they find the quality of democracy to be lacking, 27.7% saying they are satisfied enough, and a minority (3%) 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 aout their views on political system, 24.3% 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 millennials 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.

## Millennials think Indonesian democracy is backsliding and freedom is eroding

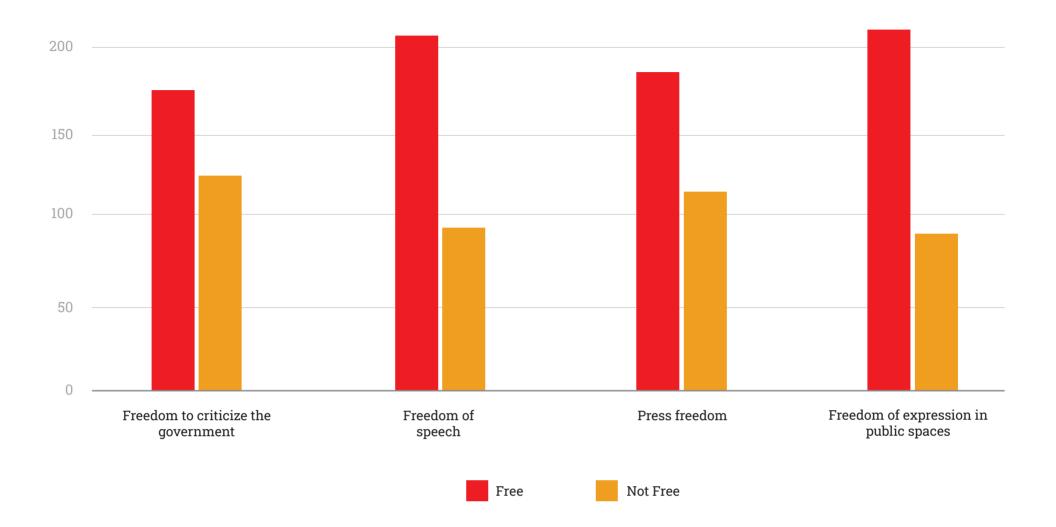


How satisfied are you with the quality of Indonesian democracy today?





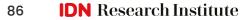
# What are your views on the following aspects of freedom in Indonesia?



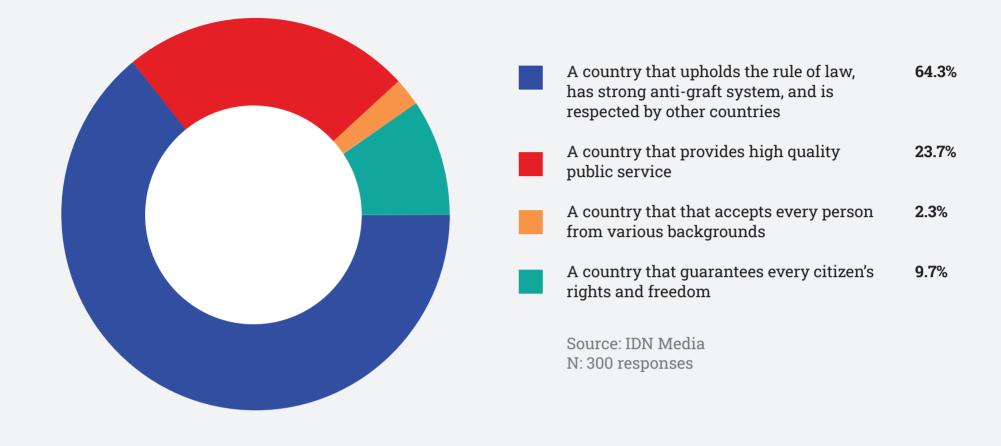


Exploring millennials' vision of an ideal future for Indonesia could provide valuable insights into how to restore their faith in democracy. A significant majority of millennials, constituting 64.3%, envisions an Indonesia that prioritizes the rule of law, maintains a robust anti-corruption system, and commands respect on the global stage. For 23.7%, an ideal Indonesia is characterized by high-quality public services. An additional 9.7% 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, 2.3% 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?



The disillusionment with democracy among Indonesian millennials 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.

Millennials, a generation laden with responsibilities and financial burdens, bear the brunt of insufficient public services and a fragile social safety net, largely attributable to corruption. In essence, their discontent arises from the adverse repercussions they experience due to the current state of governance in the country. (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.

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

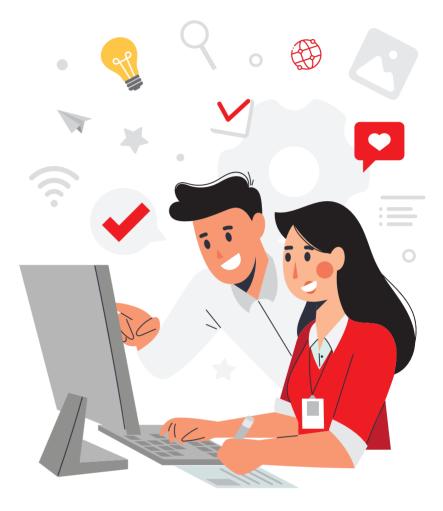
# Jobs, graft eradication, and welfare are three issues that millennials care about in 2024 elections

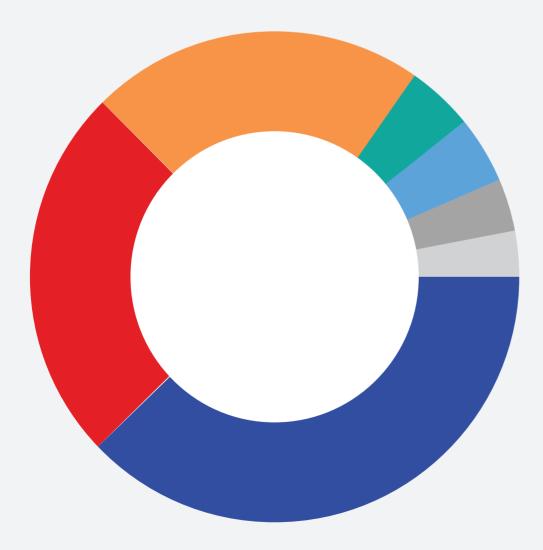
The majority of millennial respondents in our survey express their intention to participate in the upcoming elections, believing that elected officials will significantly influence both their daily lives and the overall state of the nation.

Specifically, 76% of millennial respondents in the survey indicate their commitment to engaging in all elections, with 15.7% specifying their participation in presidential elections exclusively. Meanwhile, 3.3% remain undecided, 3.3% say that they cannot vote due to circumstances, 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 millennials 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 prominently 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

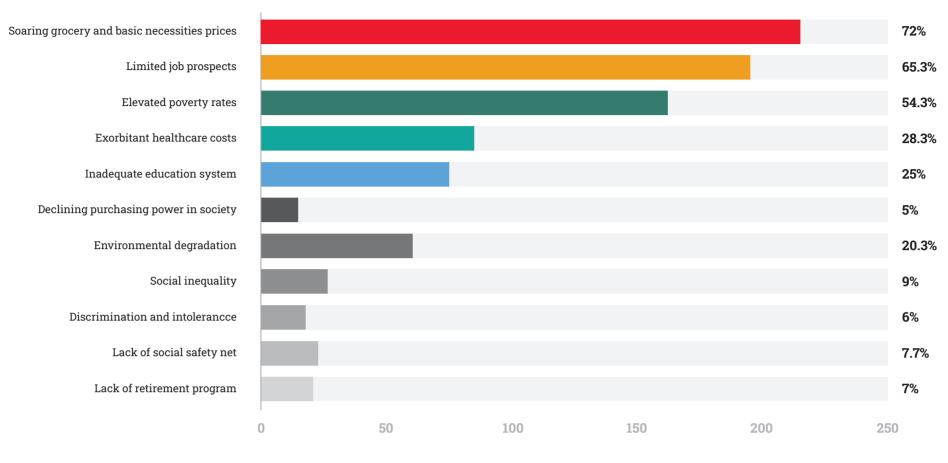
25%

Job opportunities

Graft eradication	22%
Democracy and civic freedoms	4.3%
Healthcare	4.7%
Environment	3.3%
Others	3%



## What challenges do you personally face today?



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

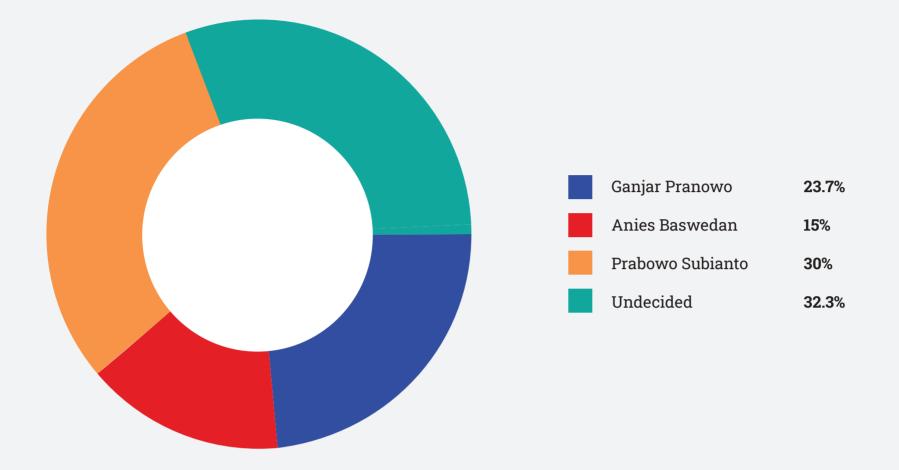
## Millennials are undecided on presidential candidates, want leader who have integrity, charisma, and remain in touch with the grassroots

As of the writing of this report in October 2023, Indonesian millennials find themselves in a state of indecision regarding their preferred presidential candidate. What's clear, however, is their collective vision for the elected leader. Millennials 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.

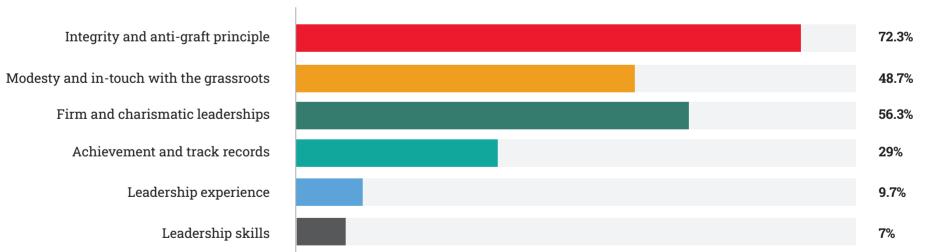


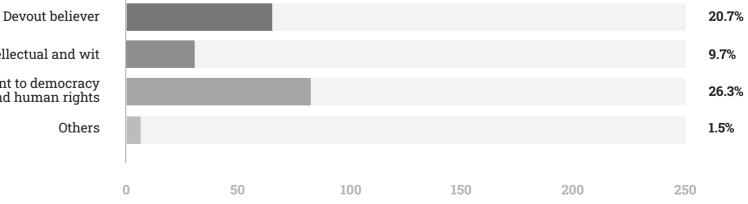
Character traits are also pivotal in their decision-making process. Integrity and a resolute anti-corruption stance rank as the top priorities, underscoring their demand for ethical governance. Furthermore, they value a leader who exudes firm and charismatic leadership qualities, as well as one who exhibits 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%.



Intellectual and wit

Commitment to democracy and human rights



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 millennials' vote is the candidates' stance on the issues that matter most to them. The alignment of a candidate's platform with millennials' 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 millennials 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 "Online media and social media are increasingly playing a role in decisionmaking among young people, including political decisions.

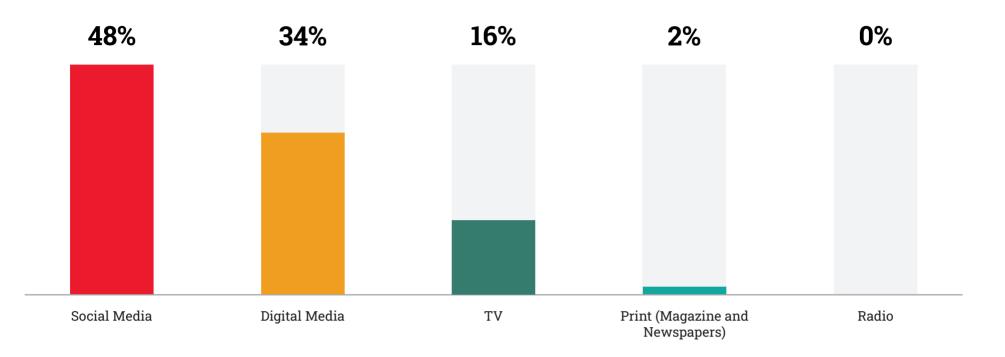
Besides being cost-effective, campaigns on social media can also be precisely targeted through algorithms. In Indonesia, there are still regions with limited internet penetration, where local media and door-to-door canvassing campaigns still play a crucial role."

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



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.

## Millennials 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 are essentials for informed voters



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.

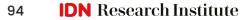
"First, let's define what apathy is because the Indikator survey indicates that the majority of young people are concerned about various issues. But the question is whether this concern translates into political participation. There's a broken bridge between youth concerns and their participation," said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

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

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."



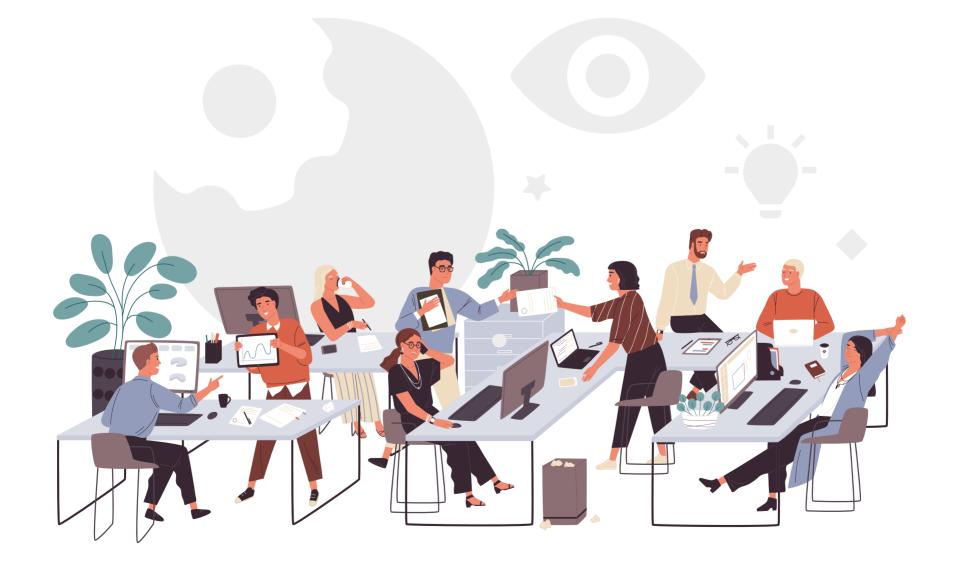
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# In-depth Interview Sources

Uni Lubis (Editor-in-Chief of IDN Times), Hana Novitriani (Vice President of ICE), Hendra Soeprajitno (Editorin-Chief of FORTUNE Indonesia), Judithya Pitana (Editor-in-Chief of POPBELA.com), Maria Novena Rarahita (Team Lead at IDN Creative), Ernia Karina (Coordinator Editor at IDN Times), Andhyta F. Utami (Environmental Economist & Founder of Think Policy), Jessica Harviali (Beauty Content Creator), Kalis Mardiasih (Writer and Gender Facilitator), Quincy Meilisa (Senior Brand Communications Manager of L'Oréal), Samuel Ray (Frugal Living Practitioner and Content Creator), Vera Itabiliana Hadiwidjojo, S.Psi., Psikolog (Child Psychologist)



# **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 | www.rumah123.com | www.srx.com.sg

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### 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.

# KOMUNITAS

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