

Indonesia Millennial Report 2019

IDN RESEARCH INSTITUTE

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Research Methodology

Quantitative

Interview method : Face-to-face interview

Sampling method : Multistage random sampling

Total sample : 1,400 respondents

Margin of error : 2.62%

Research area : 12 big cities

(Medan, Palembang, Greater Jakarta area, Bandung, Semarang, Surabaya, Balikpapan, Pontianak, Makassar, Manado, Denpasar and Mataram)

Research period : Aug 20 – Sep 6, 2018

Qualitative

Focus Group Discussion: 4 groups (early & late millennials) in Jakarta & Surabaya in September 2018

In-depth interview : Millennials figures in Indonesia in August to September 2018

Demographic Background

According to Bappenas, there are 63 million Millennials (20-35 years old). This equals to 24% of productive age populations (14-64 years old), which is accounted to 179.1 million people in Indonesia.

Indonesia Statistics Bureau projected that Millennials is a majority group in Indonesia demographic structure.

The report groups Millennials into two categories:

- Junior millennials (born in 1991 - 1998)
- Senior millennials (born in 1983 - 1990)

The Millennials are predicted to be key players in Indonesia in the period of demographic bonus year 2025-2030.

Chapter 1: Religions, Value and Tradition

81.5% Millennials supports Indonesia as a republic

19.5% (1 out of 5) Millennials stated that Indonesia is more ideal with *khilafah* system.

Further research results Senior Millennials & Millennial Women have more potential to be exposed to radicalism.

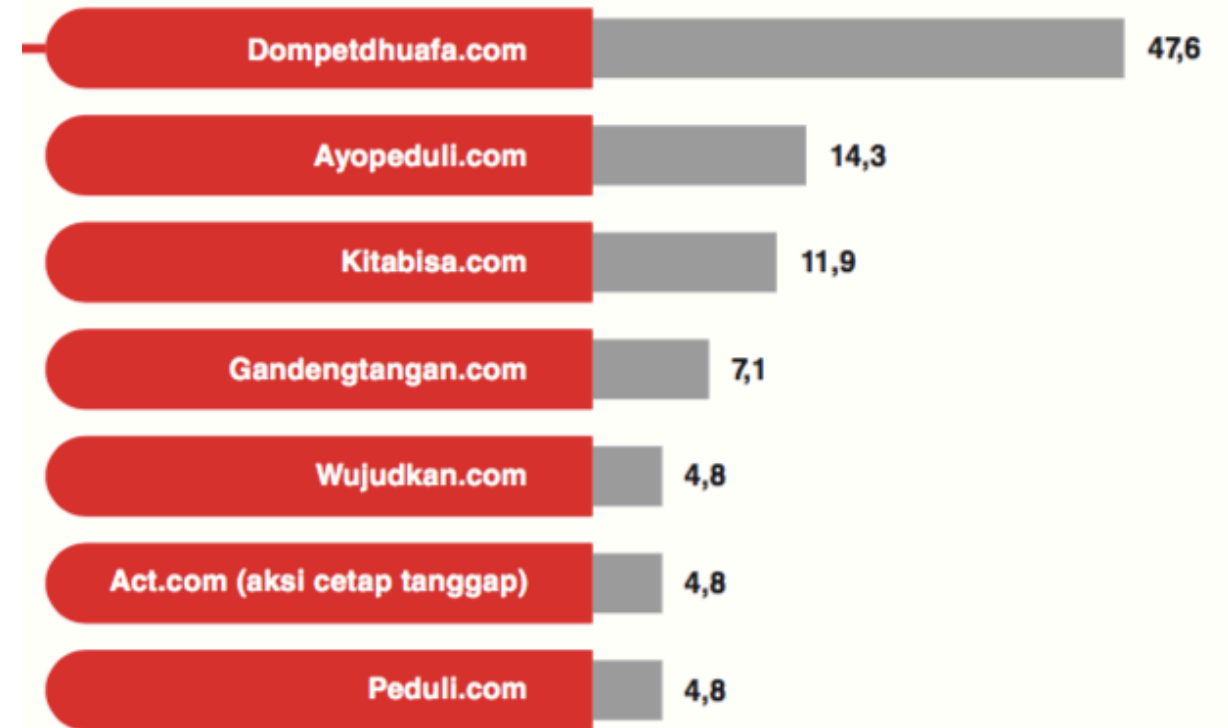
Online-based social movement (donation & petition) spread widely among Millennials.

2.7% Millennials stated that they have made donation through website.

Kitabisa.com have raised **IDR 450 billion funds** in the last 5 years for various causes such as Palu and Lombok earthquake, floating hospital development, and donation for Palestine.

An influencer, Rachel Venya, raised IDR760 million for Palu earthquake and IDR440 million for Lombok earthquake through Kitabisa.com

Fund raising app/website that the Millennials have contributed to (%)



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Online-based social movement (donation & petition) spread widely among Millennials.

10.1% Millennials stated that they have joined in online petition

Online petition movement in Indonesia gained its popularity when there was demand/resistance toward social phenomenon such as remission for corruptors, criminalization of Corruption Eradication Commission

Online petition website that Millennials have joined in (%)



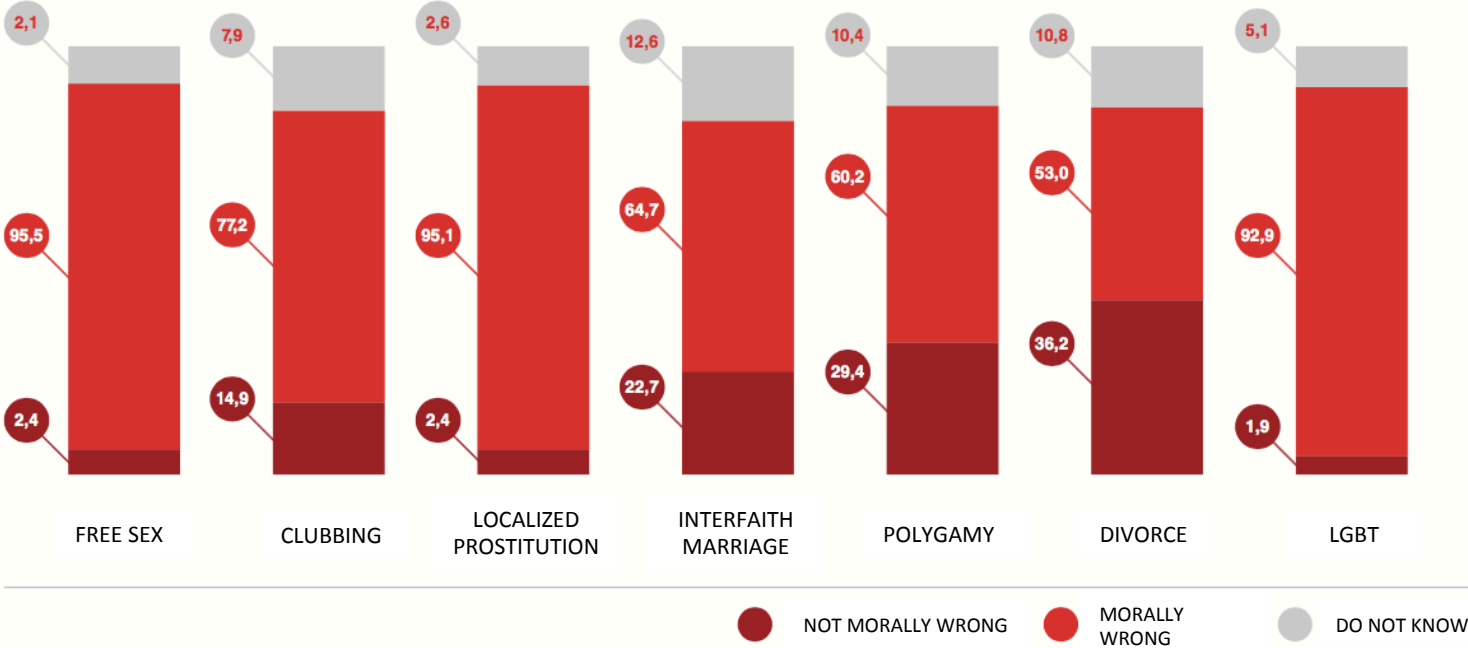
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Social Issues

Millennials consider free sex, clubbing, prostitution and LGBT as morally-wrong.

Meanwhile, there are big numbers of Millennials who consider that interfaith marriage, polygamy and divorce are not morally wrong.

Perception toward social issues (%)



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Leadership

22.4% Millennials do not support non-muslim leader.

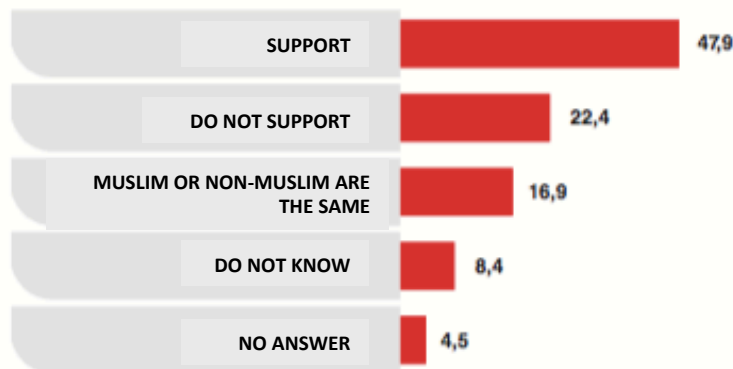
Junior Millennials (20-27 y.o.) are more tolerant to non-muslim leaders compared to the Senior Millennials.



When being faced with the choice of helping Palestine or Eastern Indonesia because of natural disaster, **66.4 % millennials prefer to help those in Eastern Indonesia.**

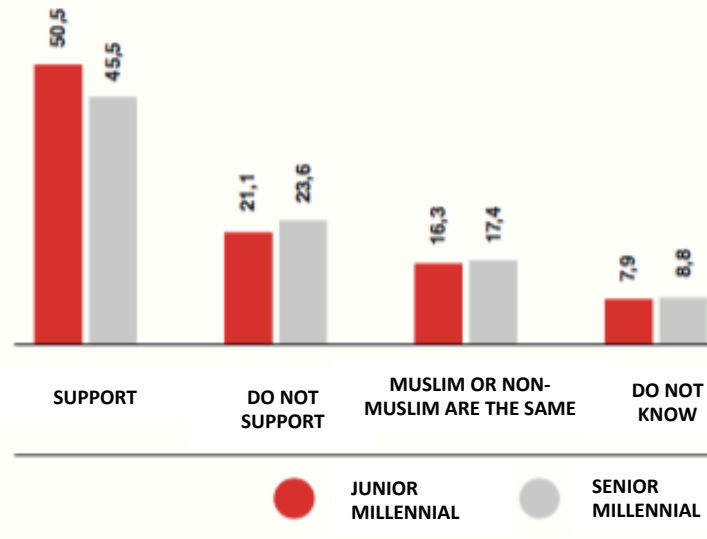


Overall (%)



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By Age (%)

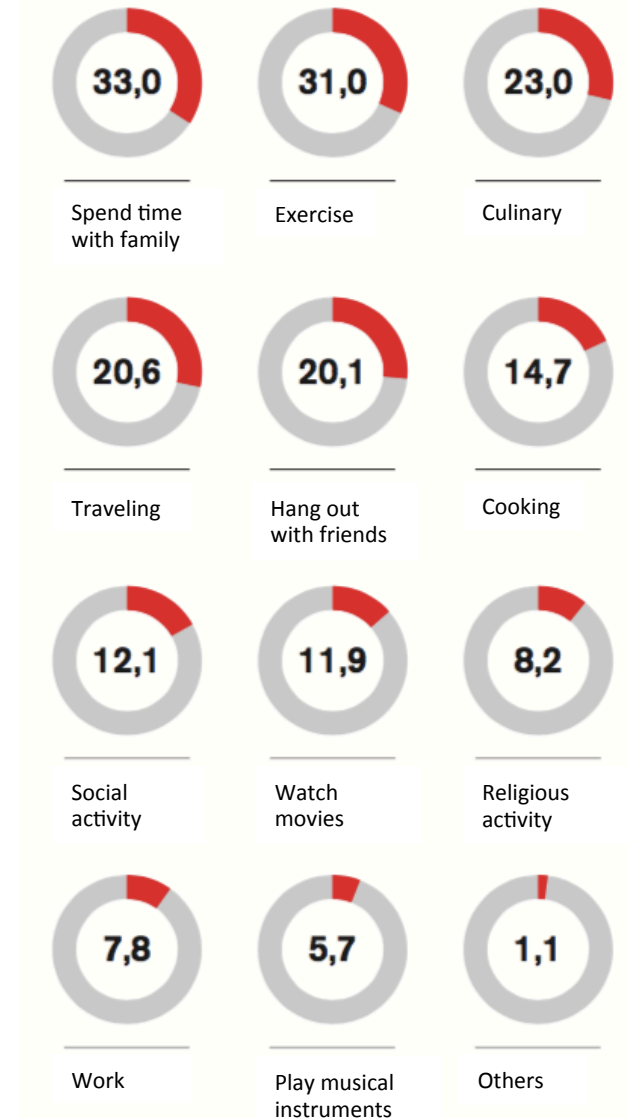


These indicates that millennials tend to be tolerant toward religious issue and politics. They also have a fairly high nationalist attitude.

Chapter 2: Family & Education

Activities Millennials Like the Most

NOTE	SENIOR MILLENNIALS	JUNIOR MILLENNIALS
“Spending time” Preference	Work and family	Campus & organizational activities, hang out with friends, do hobbies, manage business
Priority	Becoming good parents (58%), Buying house (51.5%), Making parents happy (52.7%)	Buying house (56.7%), Making parents happy (55.9%)



*(", " equals to "." or coma)
 **tahun = years old

Education

These priorities are influenced by the senior millennials' situation in which they usually have gotten married.

Another indicator that shows how parents are still dominant on the life of the Millennials is when deciding for major when study.

For junior millennials, the main influences when deciding which major that they are going to study in the university are:

- **Parents' recommendation (33.3%)**
- **The major's brand/favourite university (29.1%)**
- **Tuition fee (23.9%)**

Millennials' Priority

	Junior Millennial (20 - 27 yo)	Senior Millennial (28 - 35 yo)	Men	Women
Total Respondents	730	666	692	704
Making parents happy	55.9	52.7	52.6	56.1
Buying a house	56.7	51.5	55.5	53.0
Becoming good parents	39.6	58.0	39.9	56.7
Becoming a successful entrepreneur	34.0	30.0	36.4	27.8
Having big paycheck	35.1	23.1	38.3	20.6
Becoming a rich man	22.6	27.3	23.1	26.6
Helping others	17.7	26.1	20.2	23.2
Having flexible time	13.8	14.4	15.5	12.8
Getting married & building a family	14.9	7.1	13.6	8.8
Becoming a religious person	8.9	12.8	11.0	10.5
Not answering	0.8	0.6	0.7	0.7
Having children	-	0.2	-	0.1
Going hajj	0.1	-	0.1	-

Getting Married

According to Millennials, the ideal age to get married is 21-25 y.o (52.6%) or 26-30 y.o (43.4%).

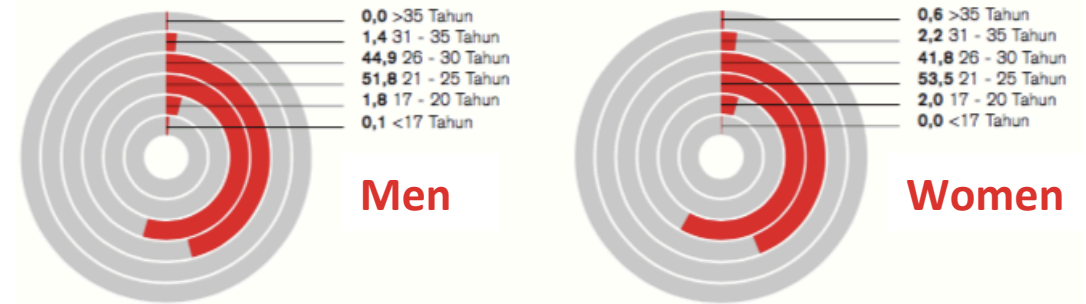
Majority of Millennials women want to have children at 21-25 y.o (59.3%), and around 26-30 y.o for the men (50.4%).

Millennial men consider their self-preparedness psychologically and financially. While, Millennial women want to get married at young age due to productive age to have children as well as more time to take care of their kids.

Senior Millennials think that there are a lot to prepare before getting married.

Meanwhile, Junior Millennials want to get married at younger age. Their wide networks and friendships may help them to select for partners, even though they are quite selective about the criteria.

Ideal age to get married



By Gender (%)

*(", " equals to "." or coma)

**tahun = years old

Chapter 3: Profession and Career

Finding Jobs

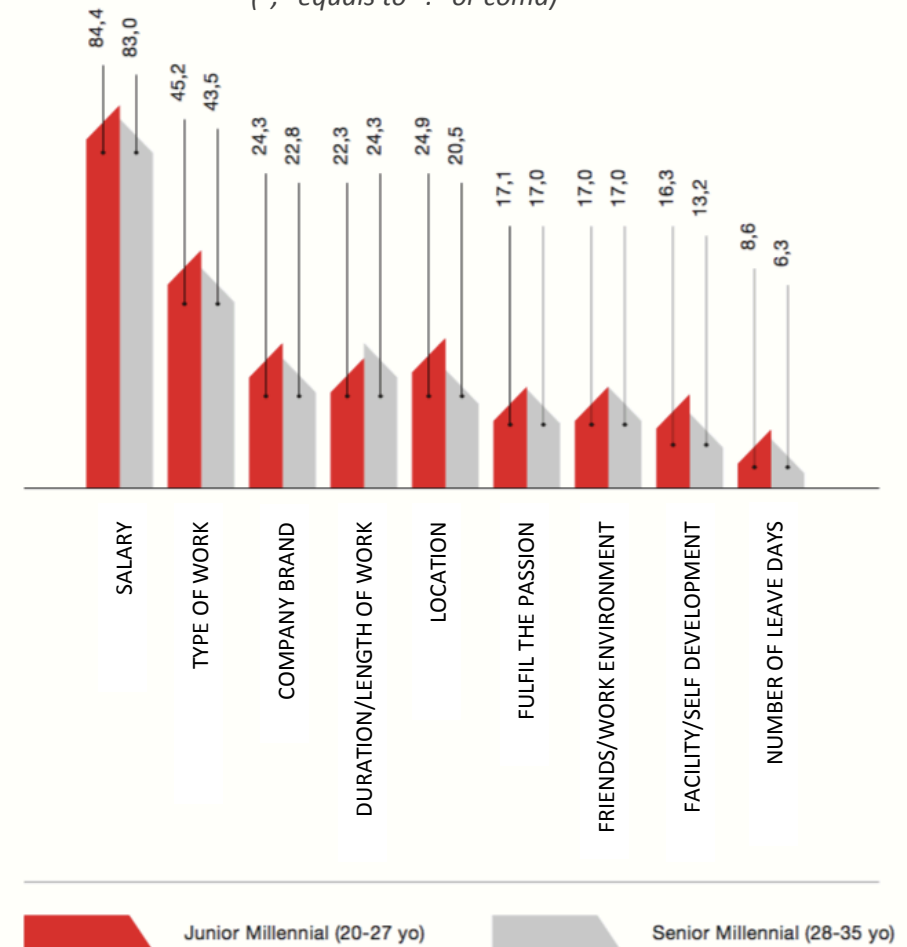
Millennials are digital native. Website becomes their main reference in looking for job vacancy.

1 out of 2 Indonesian Millennials **(47.7%)** are looking for jobs from online, especially in the group of junior Millennials.

Salary is the main factor when selecting a company. Lack of self development is the main factor that cause Millennials to resign from their job

Factors that contribute when searching for jobs

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Staying in their Jobs

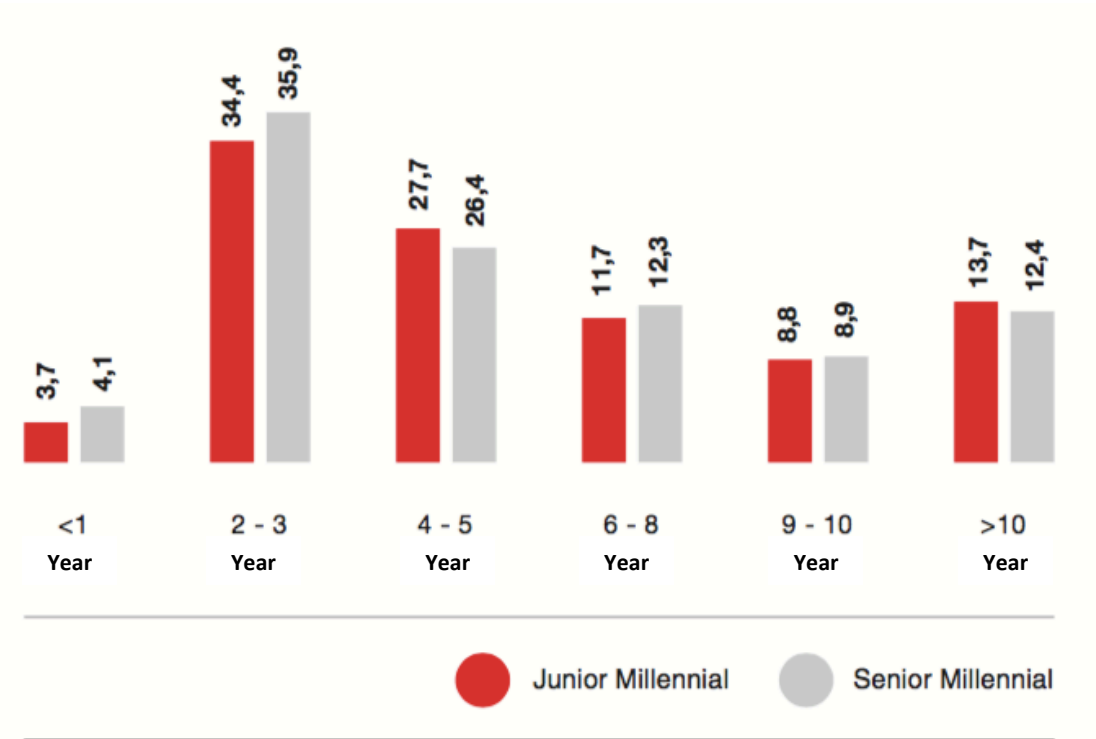
2-3 years is the most ideal time for Millennials to work in an organization.

Millennials have low loyalty level toward their company. 3 out of 10 Millennials plan to only stay for 2-3 years.

Only 1 out of 10 Millennials that stated to stay in their office for more than 10 years

“Millennials have big dreams, yet they are hard to manage. But, they are smart, therefore, we have to give them trust and objective.” – Achmad Zaky, CEO of Bukalapak.

How long will I stay in this company?



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What makes Millennials stay in their job?

Freedom of creativity

Flexible working time

Supportive team

These are applied to both senior and junior Millennials. They don't like the situation where they are being watched by their supervisors/boss. This is why many offices are decorated in such ways that boost creativity and reduce boredom.

Millennials characters:

Connected

Confident

Creative

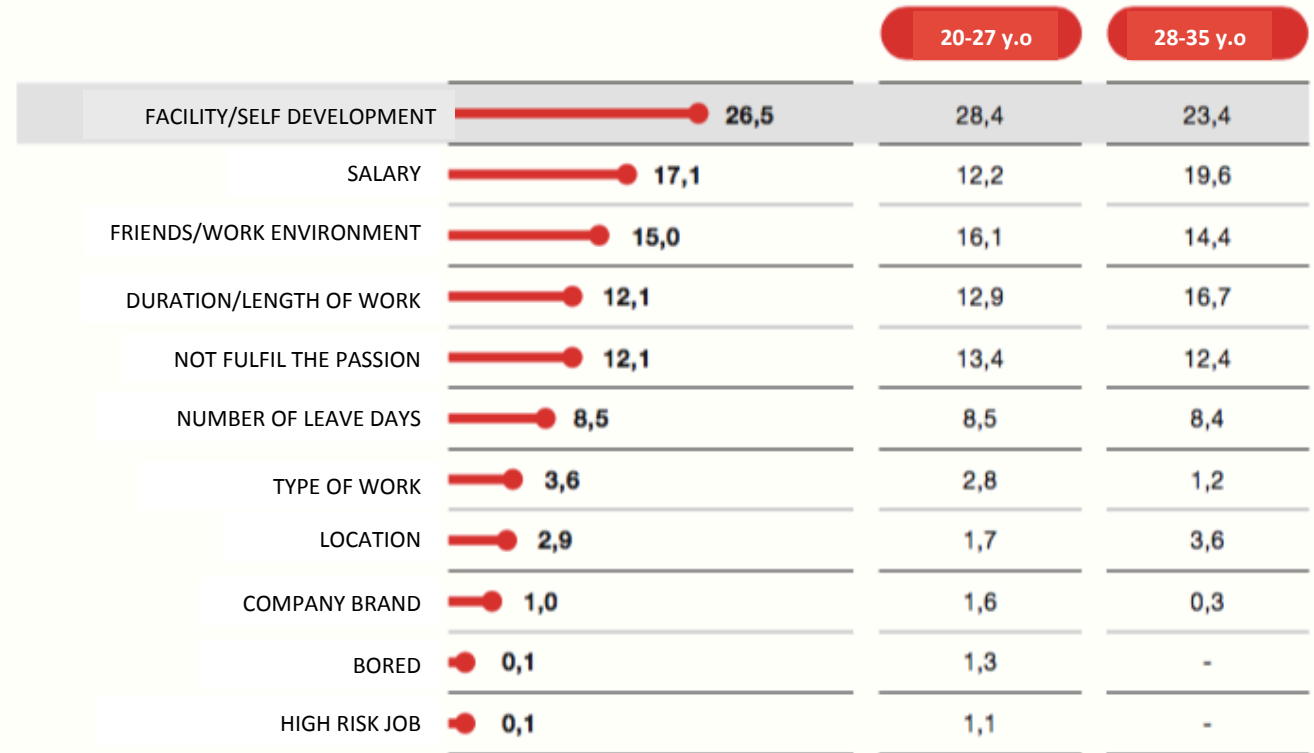
7 out of 10 (69.1%) Millennials have interest in starting their own business.

Resigning from their job/Moving to other company

Junior Millennials move to other company due to self development facility and work environment. Also, they worry the most about career, followed by life goals, education and social issues.

While **Senior Millennials** resign from their work because of self development facility and salary. What worry Senior Millennials the most? Family matters such as children education, financial issue and career.

Why do I resign?



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Chapter 4: Media Consumption

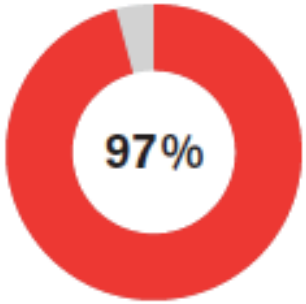
Accessing Media

- TV and digital media is the most effective media to reach the Millennials.
- Indonesia is named as the capital city of global social media and Jakarta is considered as capital city of Twitter. Yet, television still holds the power in disseminating information to the corner of Indonesia.
- 90% of Indonesians obtain information from TV.
- In the past 10 years, more than 10 printed magazines are out from the business, including the popular names such as National Geographic Traveller.
- Millennials like accessing multi-platform media; They will have the TV on, while browsing through Instagram. They still subscribe to newspapers because their parents do so.
- Before the digital era, millennials obtain information from reading the first page of newspaper or watching TV.
- Now, they read news through LINE Today Platform (the platform gathers news content from their partners such as Detik.com and Kompas.com and disseminates them with catchy headlines.
- Millennials used to get celebrity news from TV, now they scroll through IG account @lambeturah, which spread celebrity information faster than the traditional media

70% Millennials accessing digital media to obtain the most current news. Easy access, multitasking, and speed in getting information become their main reason in choosing digital media

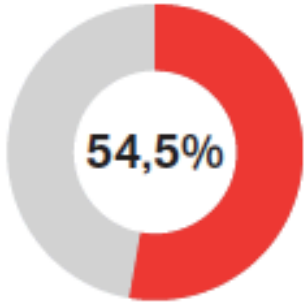
MEDIA ACCESSED (%)

TELEVISION



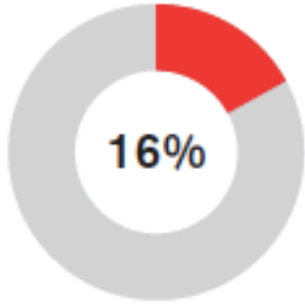
In the past 1 month

DIGITAL MEDIA



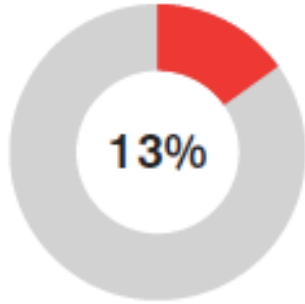
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RADIO



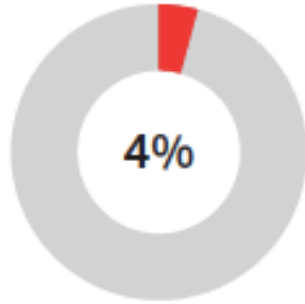
In the past 1 month

NEWSPAPER



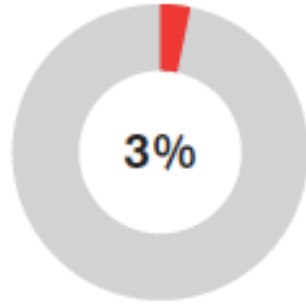
In the past 1 month

TABLOID



In the past 3 months

MAGAZINE

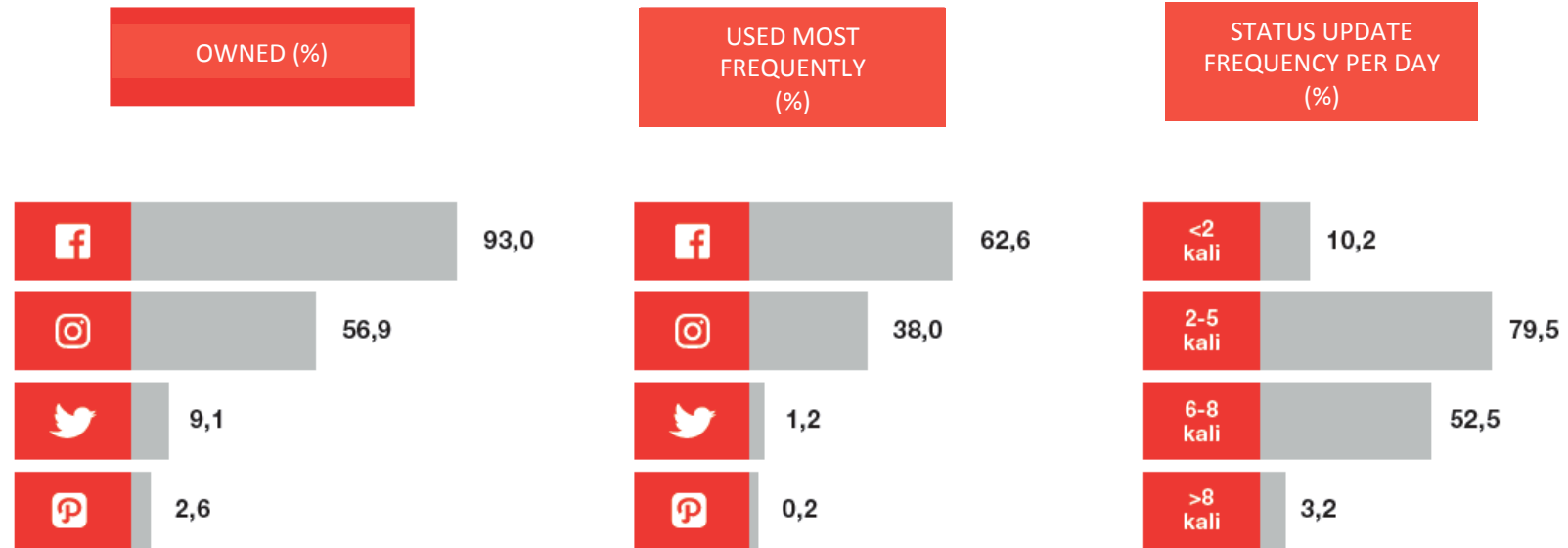


In the past 3 months

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Social Media Behaviour

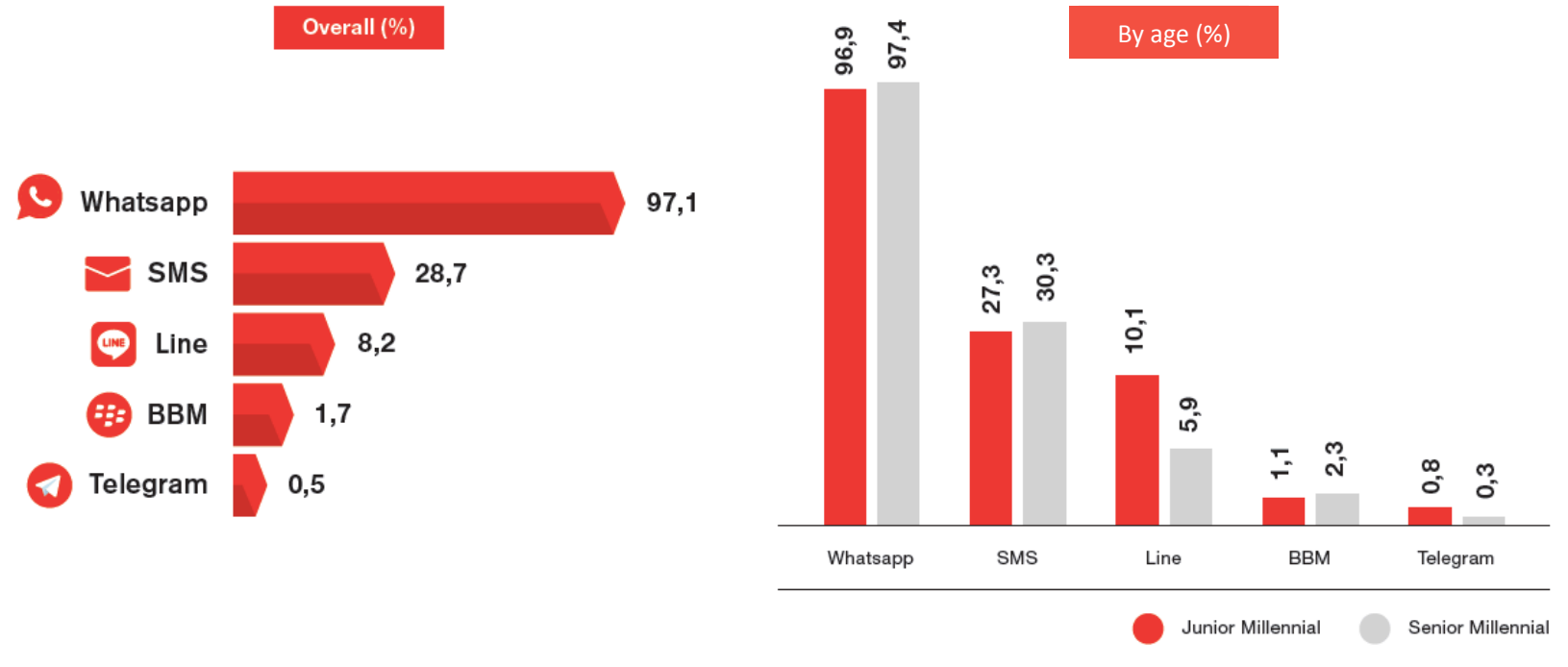
- Instagrammers and Youtubers are considered stars by Millennials.
- Instagrammers and Youtubers have big influence in Millennials' decision making process.
- Millennials love to read/watch product review online or unboxing videos from instagrammers and youtubers before deciding to buy products.
- Food influencers and travel bloggers influence Millennials to make decision about where to eat and where to go for holiday.



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- Junior Millennials are more active in social media than their seniors.
- Millennials starting to get more wise in using social media, especially about hoax. They are active in pushing wisdom of crowd, information clarification agent.
- Among Senior Millennials, hoax spread through WhatsApp. Meanwhile among Junior Millennials, hoax spread through Facebook or Instagram

Messaging Applications Used



*(", " equals to "." or coma)

	SENIOR MILLENNIALS	JUNIOR MILLENNIALS
Social media owned	Instagram Facebook Twitter	Instagram Facebook Twitter Pinterest Path
Social media actively used	<p>"I'm more active on Instagram"</p> <p>"I'm more to Facebook because my friends post their content there more often."</p>	<p>"Using Instagram more often because it's being a trend."</p>
Status update intensity	<p>"No, I don't post every single day."</p>	<p>"At least once a day. Depend on the mood."</p>
Status posted	<p>"I post about my daily activities, but i don't post often, it's quite rare."</p>	<p>"About daily activities." "I can be honest on Twitter. On Instagram, I feel like, "Umm, is it proper enough if I post this?"</p>
Like to share or not?	<p>Majority share particular information after checking them</p>	<p>Majority share particular information after checking them</p>
Reason	<p>"I'll check first, and I think this is quite correct." or "It's correct, and its <i>share</i>-able, so I won't be feeling way too guilty if I share about wrong information."</p>	<p>"I rarely share, I'll check the information first, so many hoax lately."</p>

Chapter 5: Internet and Online Behaviour

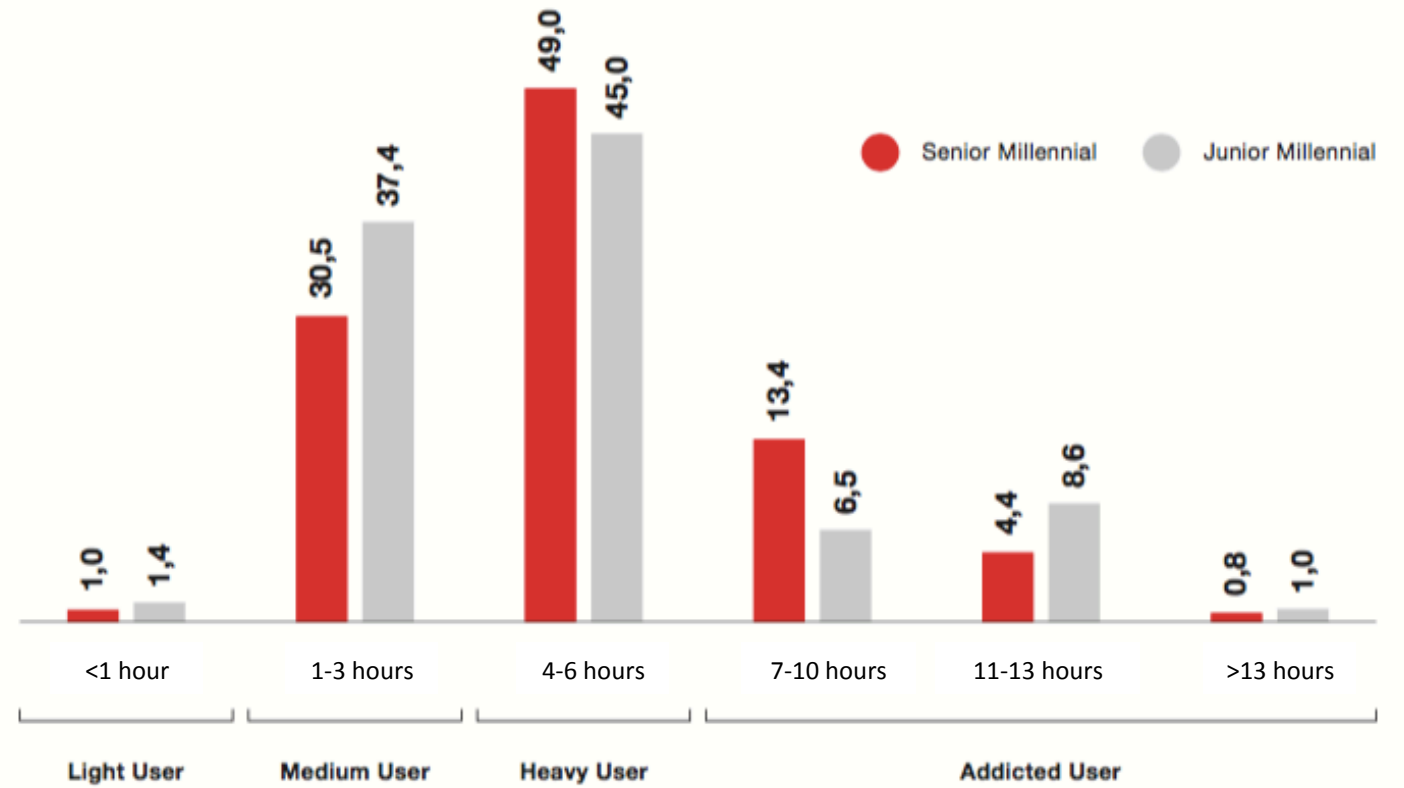
79% Millennials open their smartphones 1 minute after waking up.

94.4% Millennials are connected to internet.

They are also called internet-addicted generation or **i-generation**.

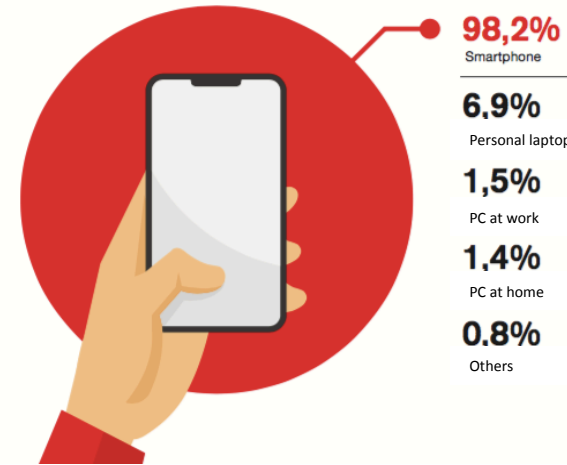
9.6% Junior Millennials & 5.2% Senior Millennials spend more than 11 hours to use internet

“They are worried if they don’t have their smartphones with them”



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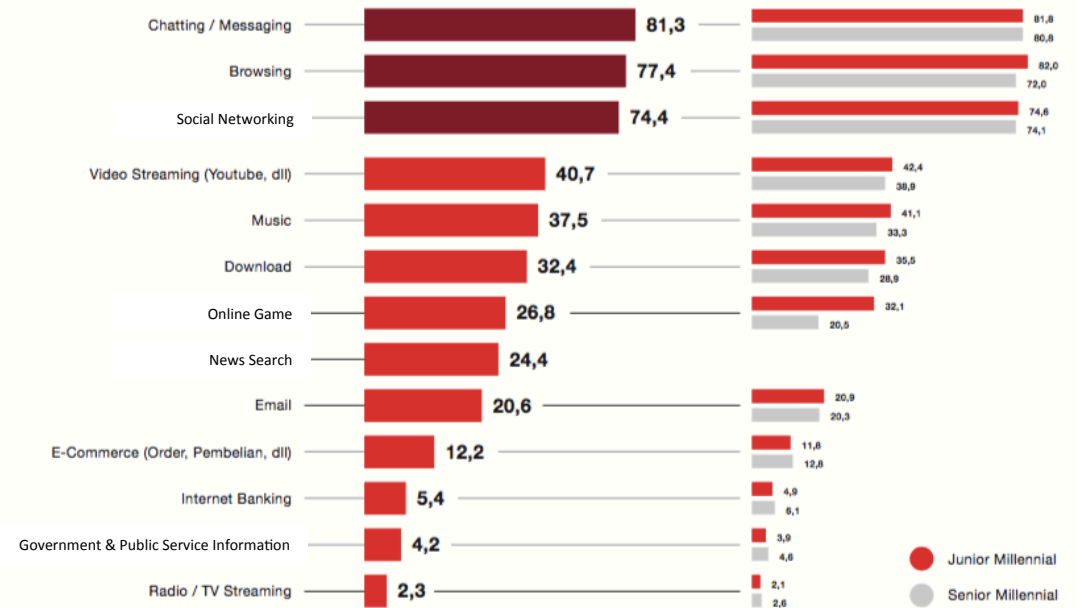
98.2% Millennials use smartphones as the main device to connect to internet



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Four main activities when connected to internet:

- Chatting/messaging
- Browsing
- Social networking
- Video streaming
- Others: music, download, online games, etc.



● Junior Millennial
● Senior Millennial

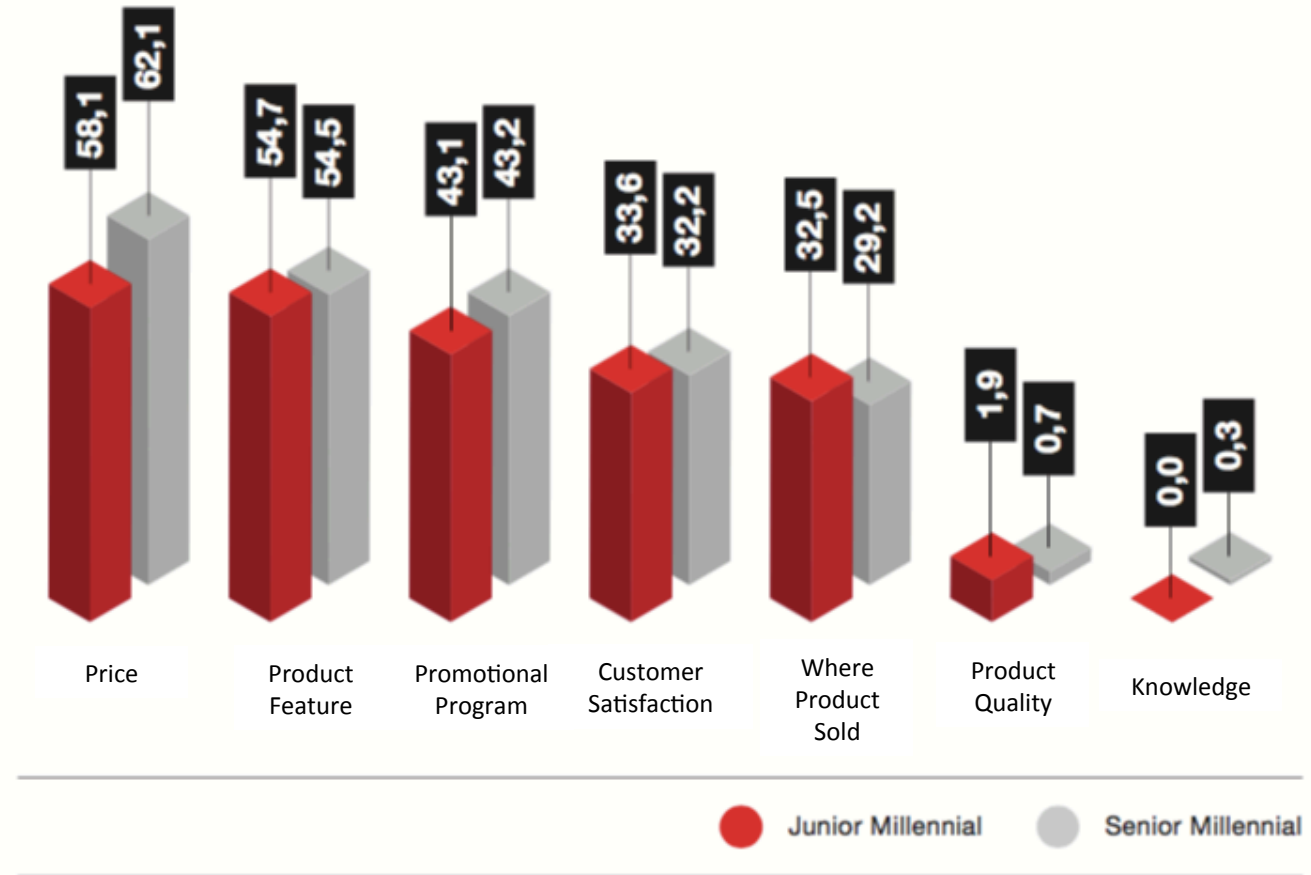
Internet changes customer journey map.

57.6% Junior Millennials find products information online prior to buying them. In total, 5.6% Millennials prefer this method.

59.7% Millennials compare prices online before making purchase.

Looking at the amount of information they are searching on the internet shows that Millennials are detail and careful before purchasing products. It is possible that they are the type consumers who are quite “fussy” compared to consumers of other generations

Information searched before buying products



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In the past 6 months, Millennials buy product online through:

- Lazada (23.5%)
- Shopee (10.6%)
- Tokopedia (9.9%)

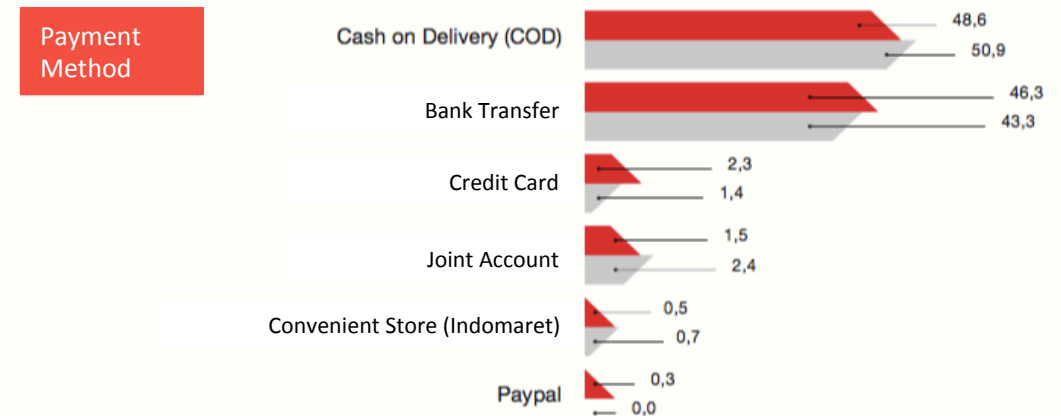
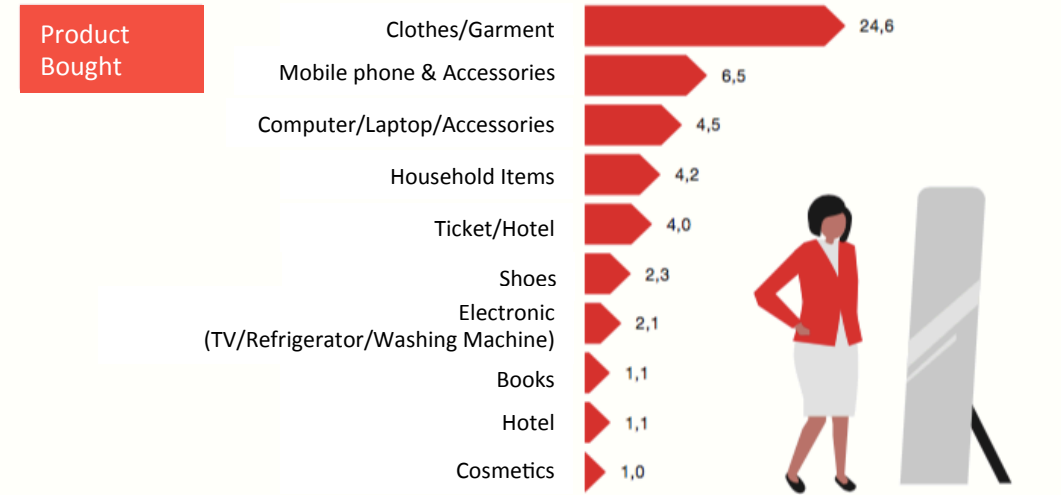
Millennials are the biggest segment in e-commerce and they have been educated naturally.

Even though they experience disappointment from online purchase, they will still recommend their friends to buy online.

1 out of 2 Millennials buy online and pay with with cash on delivery method.

1 out of 4 Millennials who do online shopping purchase clothes.

Products bought in the past 6 months and payment method



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Junior Millennial Senior Millennial

Chapter 6: Entertainment and Recreation

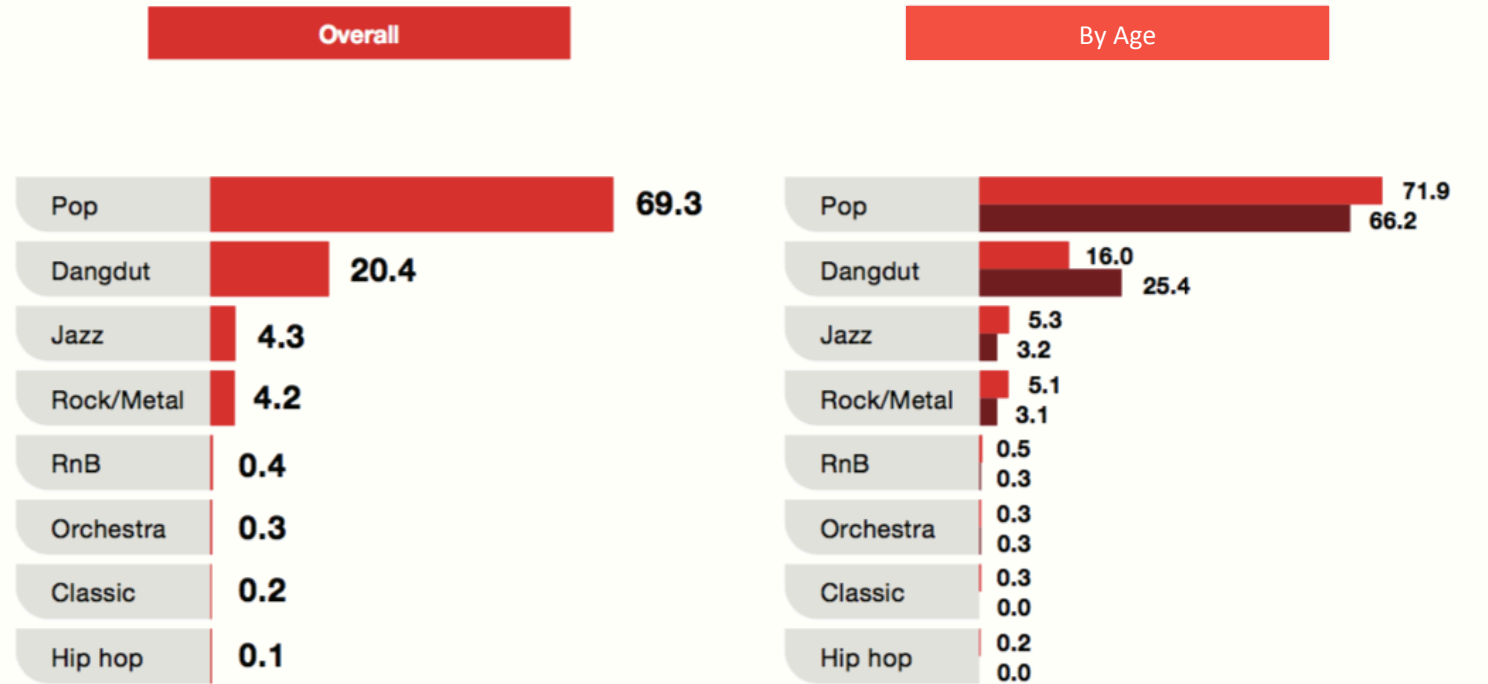
Music

After pop music, dangdut is the second music genre that Millennials like the most, followed by jazz and rock.

69.3% Millennials like pop music and 20.4% of them loves *dangdut*.

**dangdut is Indonesian popular music for dancing that combines local music tradition, Indian and Malaysian music films and western rock.*

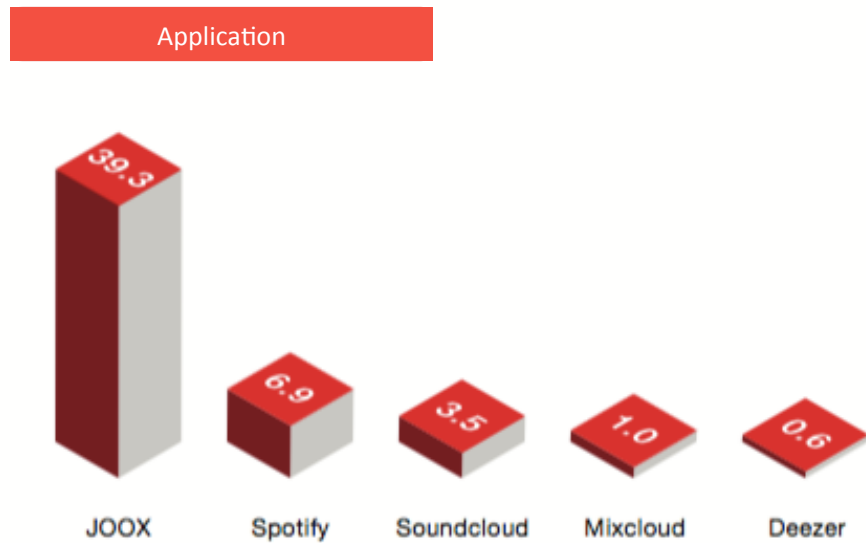
Music genre preferred (%)



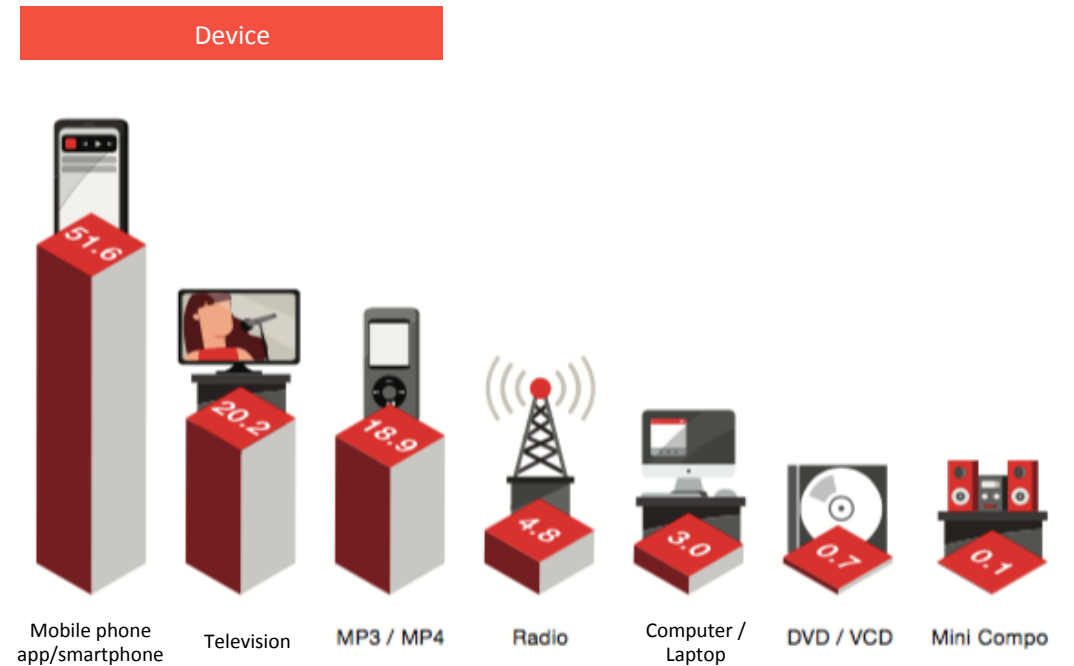
Music

51.6 % Millennials listen to music through streaming application or illegal download.

Applications used the most are JOOX and Spotify



Device & Applications used to listen to music (%)



Movies

Millennials are captivated by romance movies made by local filmmakers.

Avengers or Dilan?

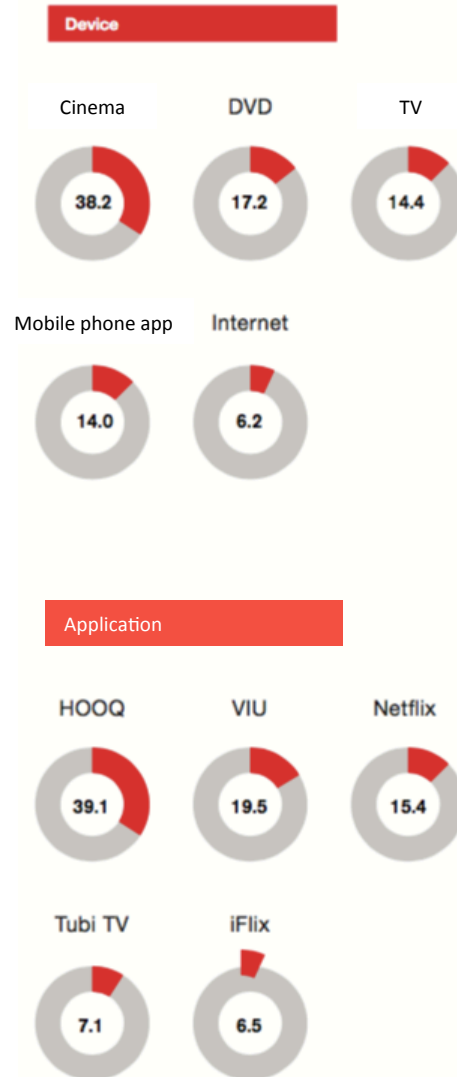
47.7% Millennials like action movies, followed by romance, comedy and horror.

Men like action movies (**66.2%**), while the women loves romance movies (**34.2%**)

Action movies millennials like are among others Captain America, The Avengers, Iron Man, Mission Impossible, Mile 22 (starring Indonesian famous action star).

While for romance, they like Habibie Ainun, Ada Apa Dengan Cinta and Dilan 1990 (these are all Indonesian movies).

Device & app to watch movies (%)



Games

Mobile Legends dominate the mobile games market in Indonesia

40.7% Millennials download online game into their smartphones.

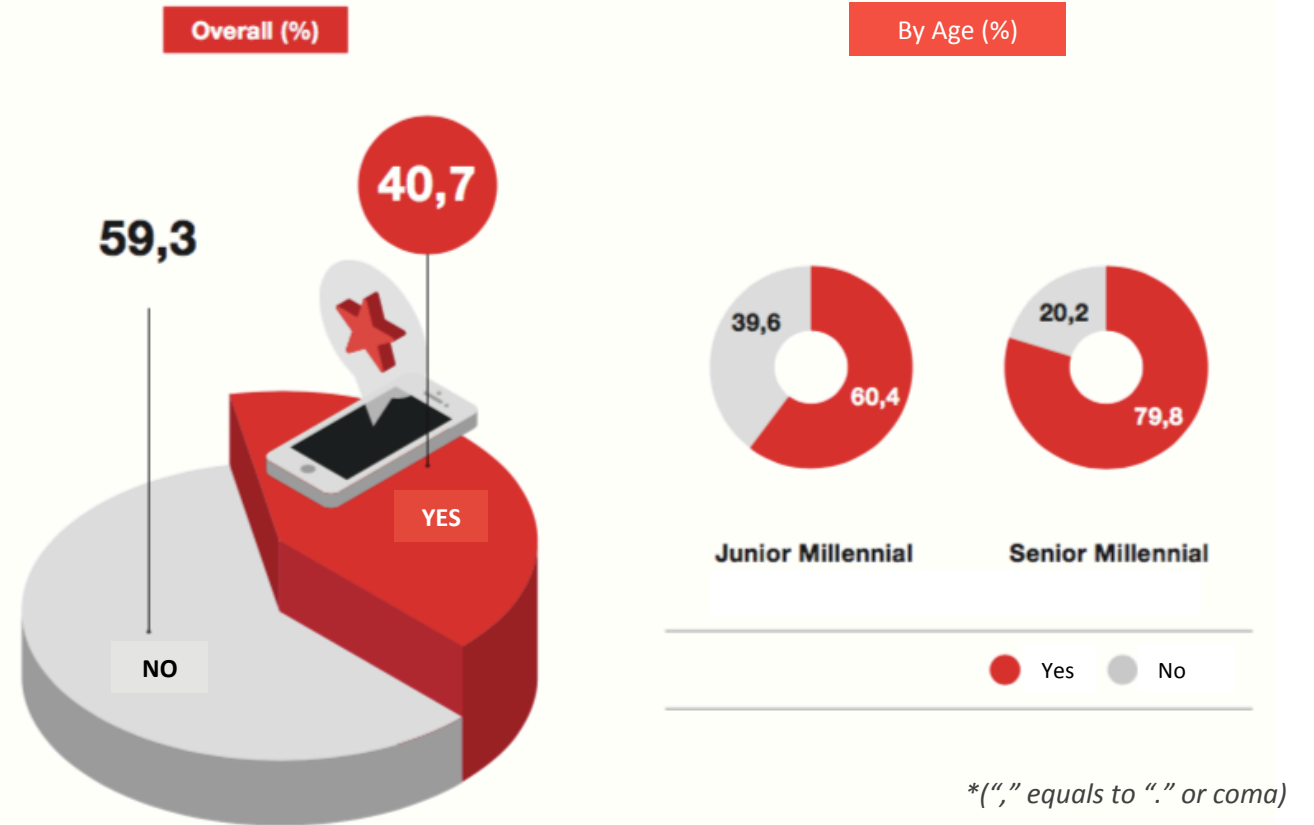
39.5% Junior Millennials & 20.2% Senior Millennials have online games on their smartphones.

The most popular games?

- Mobile Legends
- Clash of Clan

“Playing online games is my mood healing method when I feel tired from the work routine”

Online Game App on Smartphones



Photos

Millennials are quite a narcissist generation. They take photos almost everyday and capture an object 2-5 times.

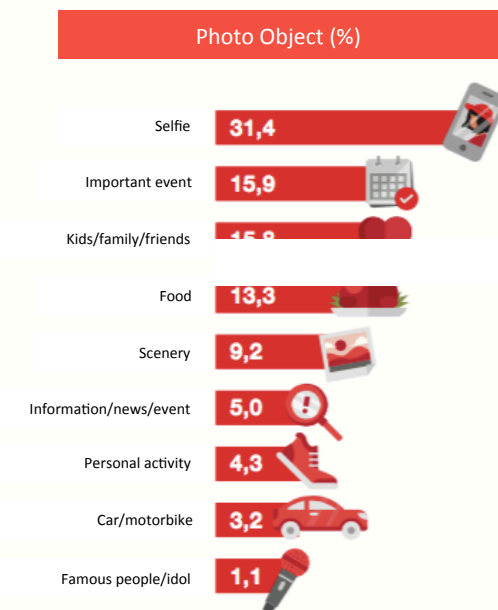
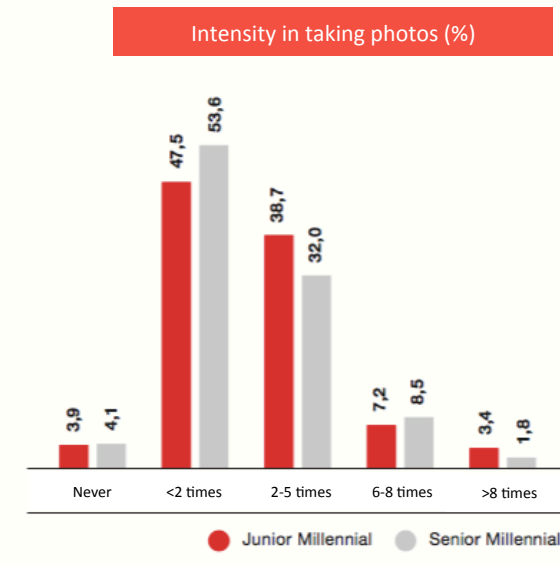
Most of the object that they take photo of? **Themselves.**

31.4% millennials stated that they like to do selfie.

Junior Millennials are more narcissistic compared to their seniors.

The women take selfie more often than men.

"I selfie, therefore, I exist"



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Traveling

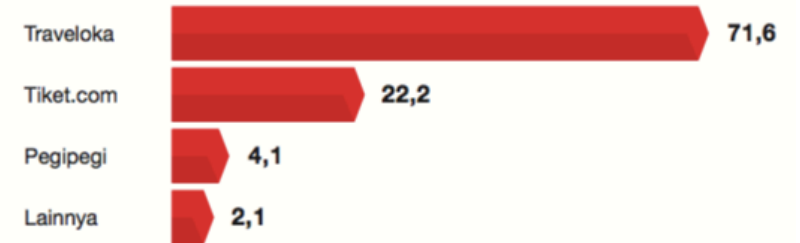
4 out of 10 (38.3%) millennials travel abroad or domestically every year.

What makes them travel often?

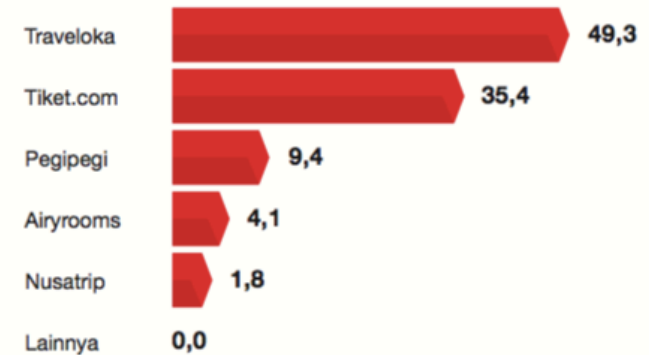
- Online application to book for transportation, hotel or travel destinations.
- Easy payment method (transfer, credit card or installment)
- Travel fair



Where do you buy airplane tickets online?



Where do you book hotels online?



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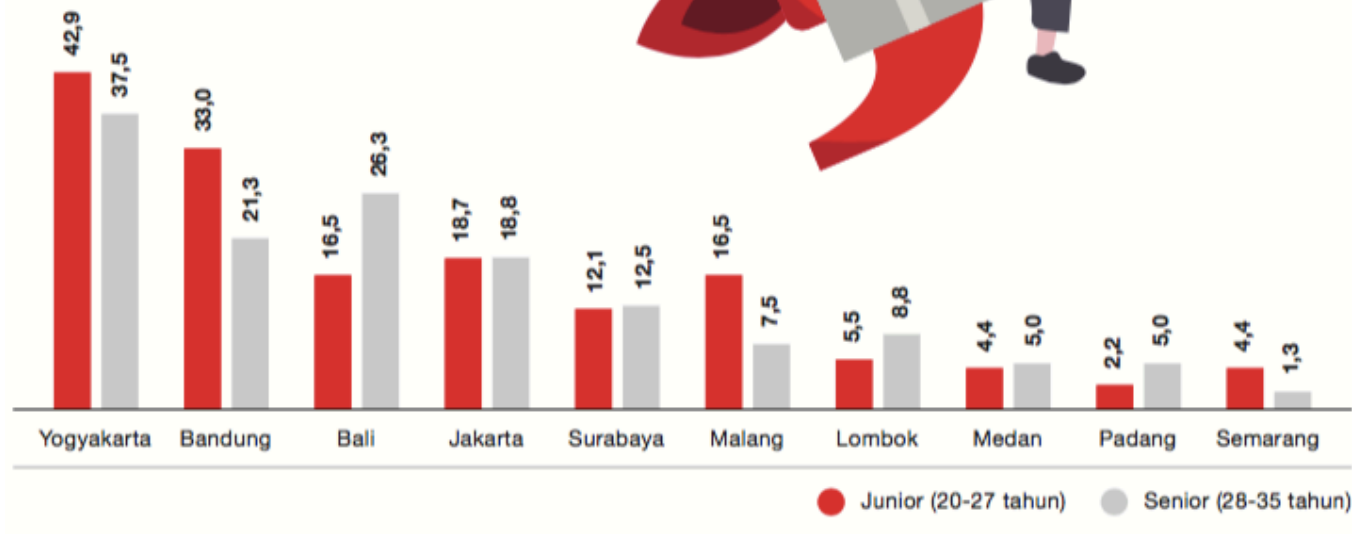
Travel Destinations

Millennials stated that they like going to Yogyakarta, Bandung or Bali for holiday.

Junior Millennials prefer to go to Yogyakarta and Bandung.

Senior Millennials prefer Yogyakarta and Bali for leisure.

Favourite traveling destination (%)



**(", " equals to "." or coma)*

The difference between senior and junior Millennials when traveling



Senior Millennial

28 - 35 years old

TRAVELING PLAN

Senior Millennials are more prepared, starting from duration, cost, ticket, accommodation, destinations/attractions to visit, etc.

DESTINATION

Senior Millennials choose places near their homes or places that are convenient for family.

HOLIDAY PARTNER

Senior Millennials prefer to travel with family.

FACTORS TO CONSIDER

Cost, family, time (weekend/weekdays).



Junior Millennial

20 - 27 years old

TRAVELING PLAN

Junior Millennials love to travel suddenly, with no preparation, especially when they get bored.

They can search for tickets 1-2 days before leaving or find accommodation as they get there.

HOLIDAY PARTNER

Junior Millennials prefer to travel with friends or going solo.

DESTINATION

Junior Millennials look for new, popular and challenging destinations.

FACTORS TO CONSIDER

Time when they feel bored/worn out, special occasion such as festival or concert

Chapter 7: **Consumption and Buying** **Behaviours**

Financial Condition

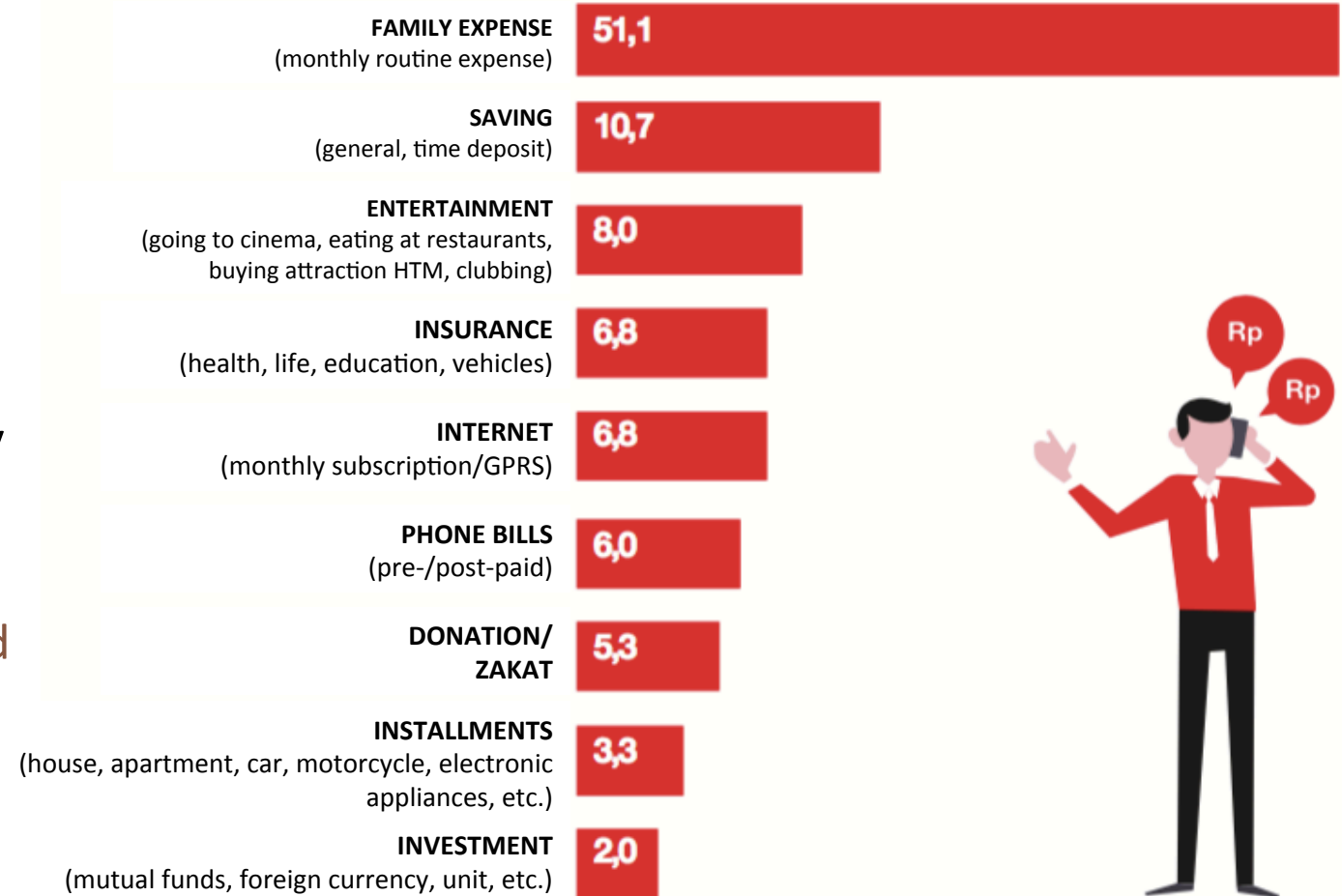
Millennials allocate 10.7% of the income for savings.

51.1% of the income is drained for monthly expenses.

They carry cash just as needed, enough to buy meals, pay for movie ticket and parking.

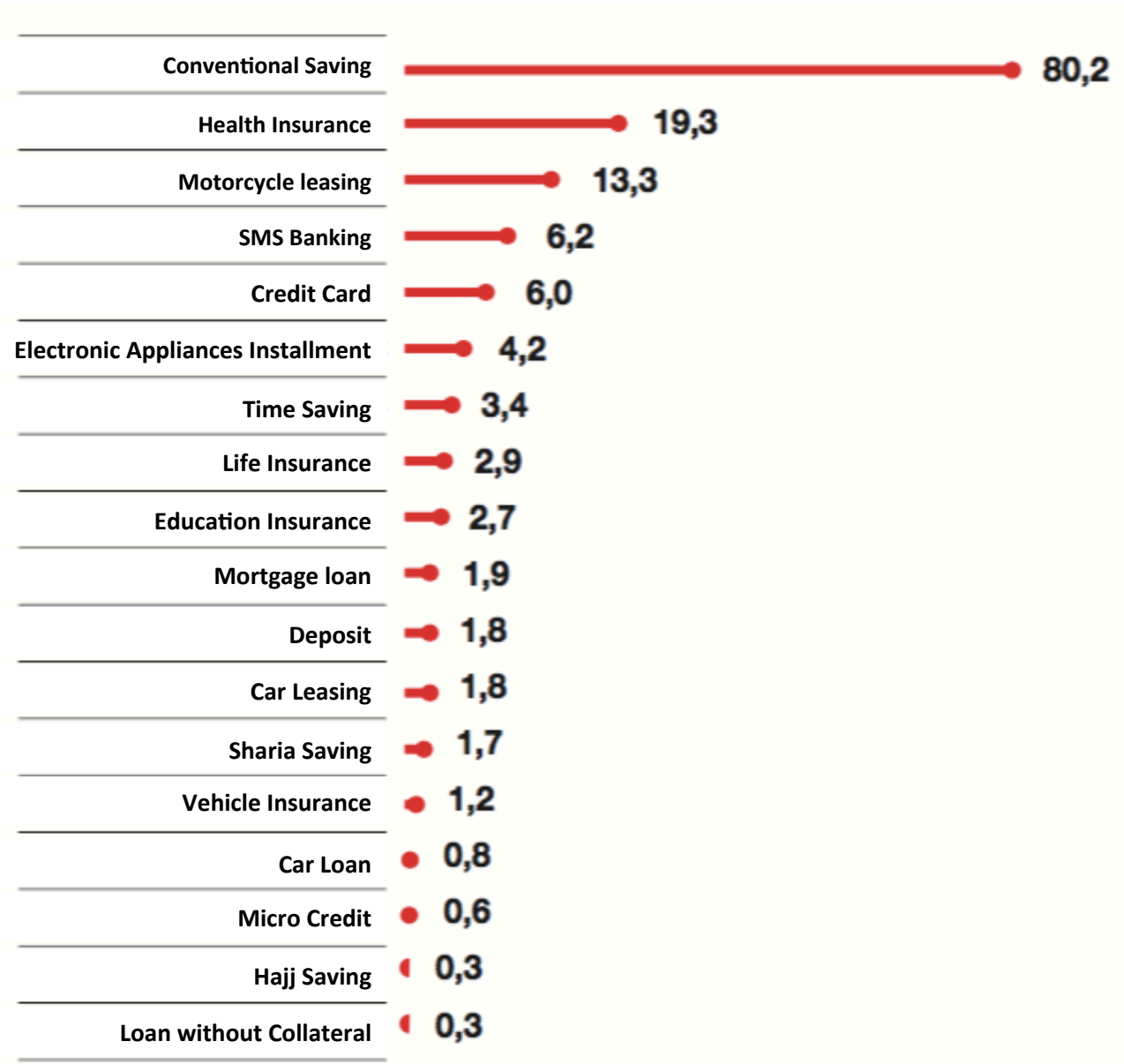
The survey shows that millennials is quite a consumptive generation. Yet, they understand about future financial risk that they allocate 6.8% of the income for insurance.

Monthly Expense Percentage



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Financial Products Used



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Payment

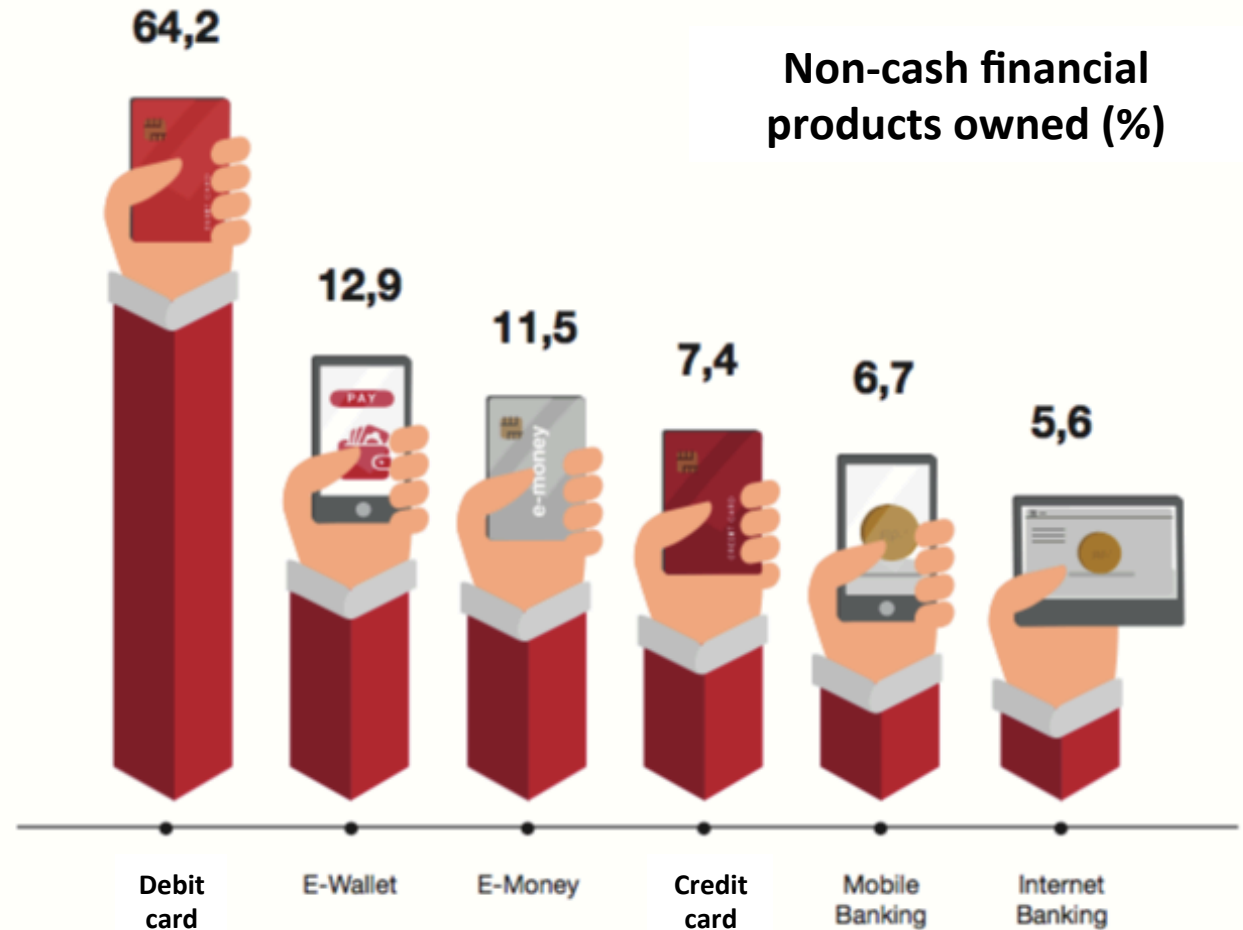
Millennials living a cashless lifestyle. They rarely bring big amount of cash.

Apart from debit card, millennials own e-wallet (21.9%) and e-money (11.5%).

Non-cash financial products such as mobile banking and internet banking is getting less popular.

Millennials tend to do gadget payment/transaction.

They feel that they are more consumptive when bringing cash.



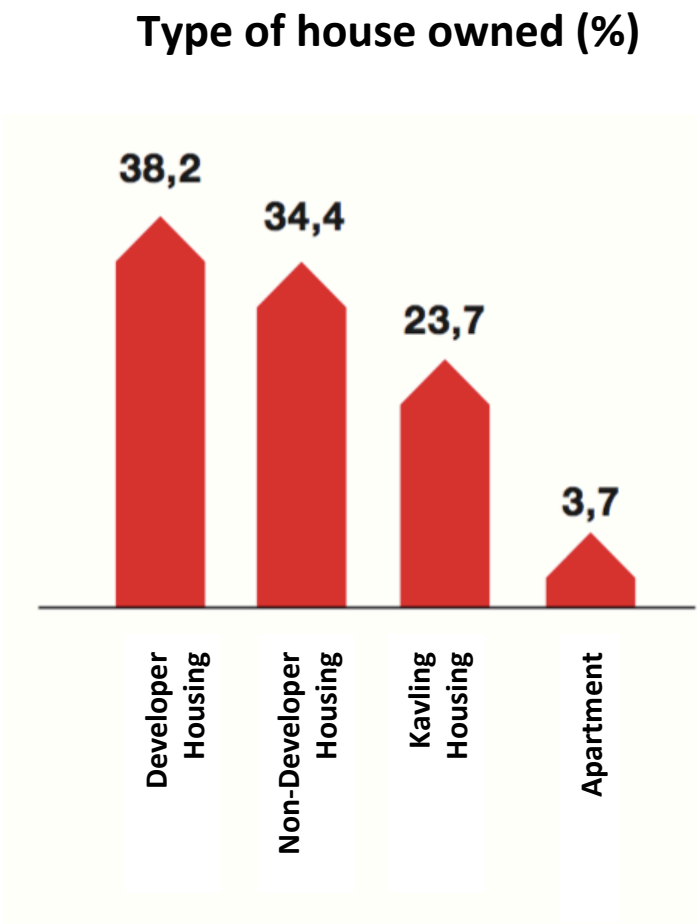
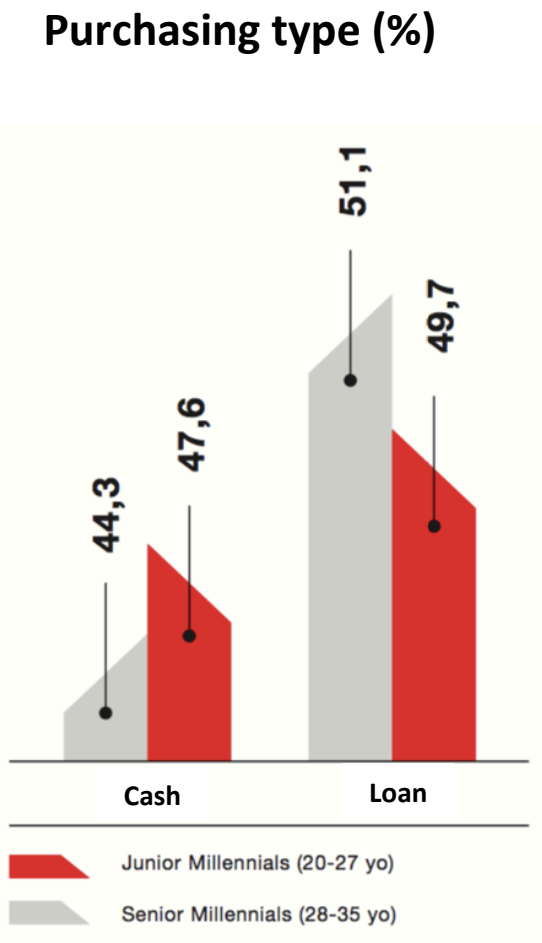
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Buying House

Only 35.1% Millennials have their own house.

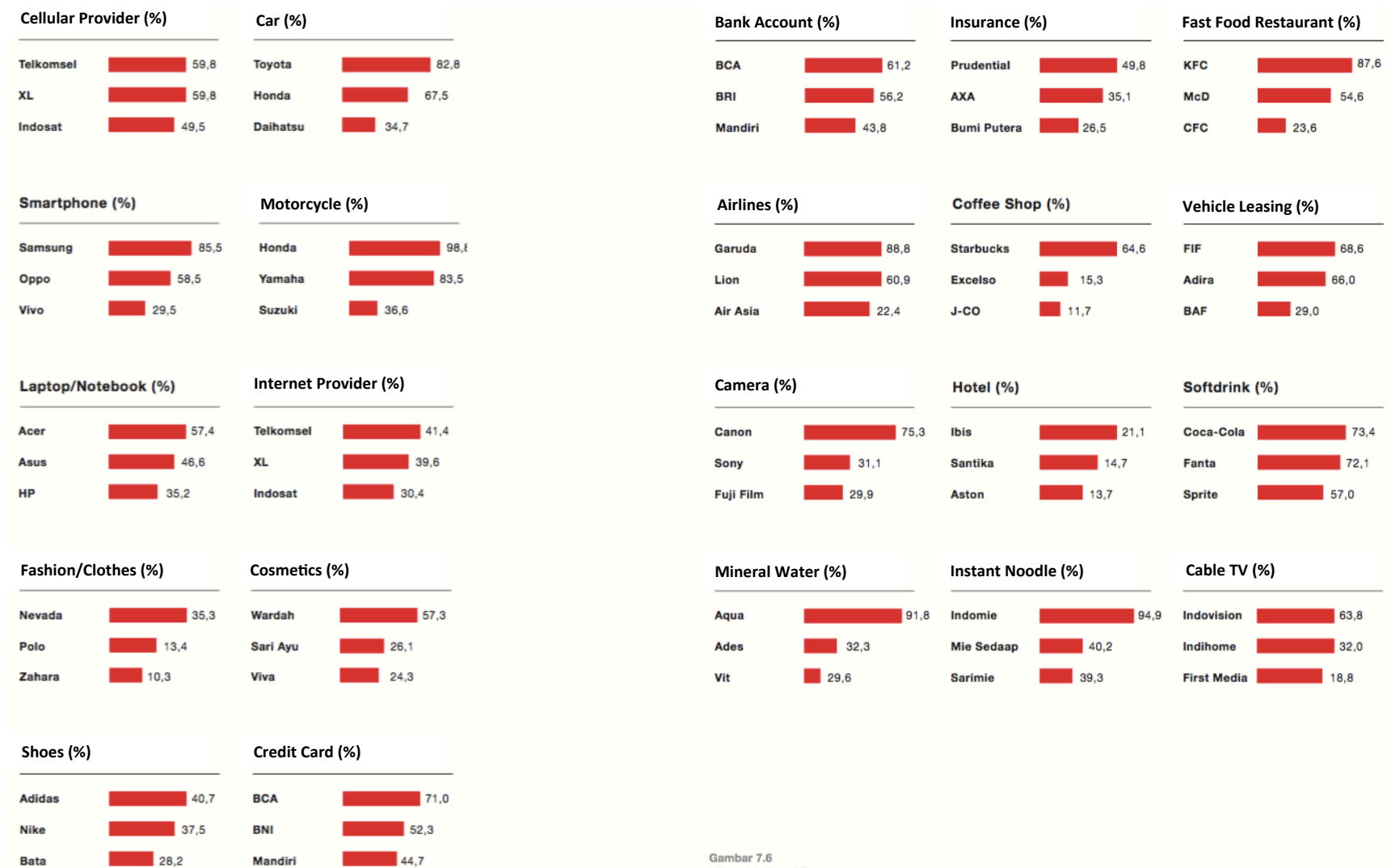
49.8% buy their house in cash, while the remaining 50.2% buy through mortgage.

Senior Millennials prefer to buy house through mortgage scheme, meanwhile their juniors are divided into two groups almost evenly.



*(", " equals to "." or coma)

Millennials Brand Product



Gambar 7.6
Millennials Brand Product

Chapter 8: Political View

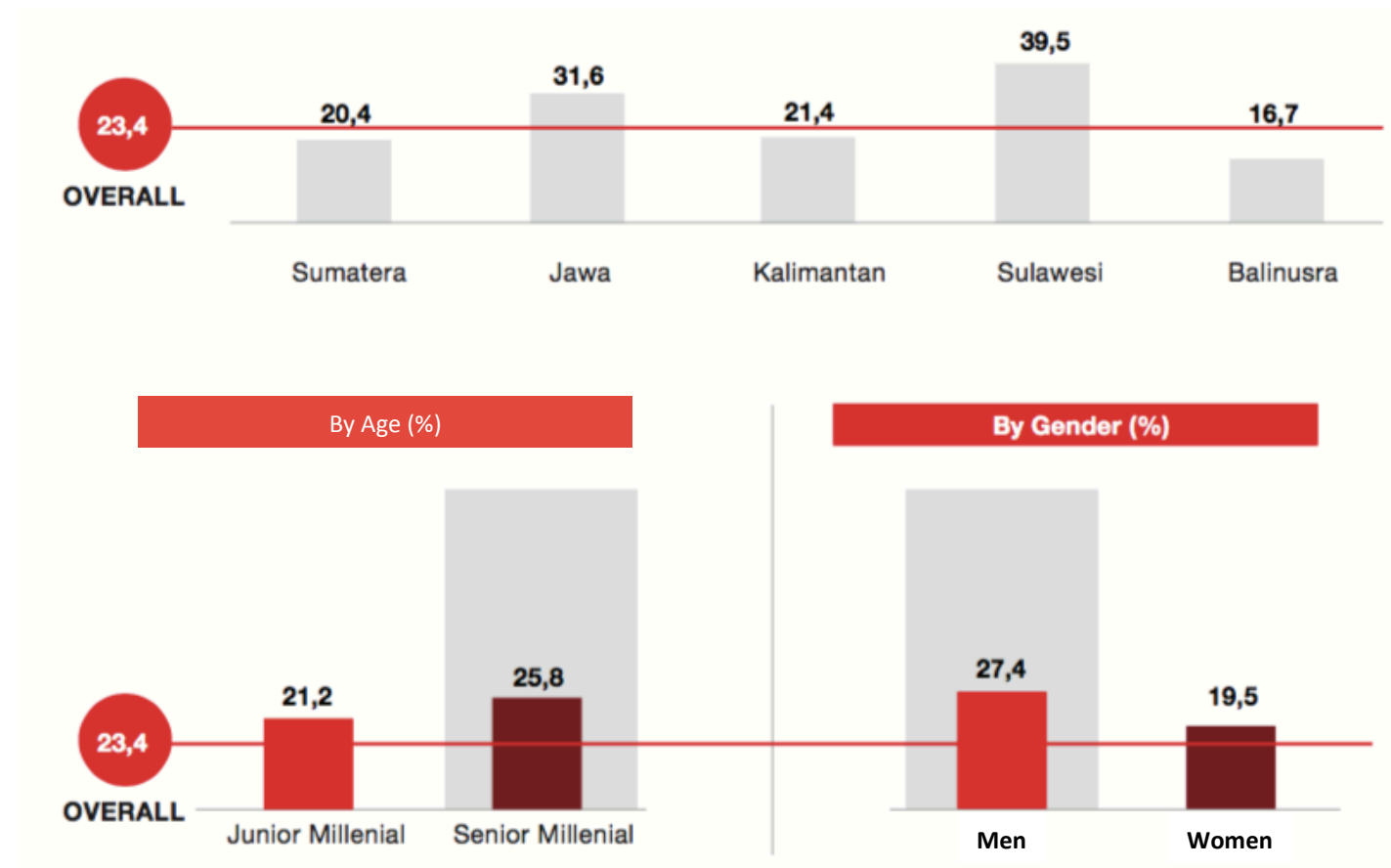
Interest Toward Political News

Only 23.4% Millennials follows political news/issues.

It's not that Millennials do not care with politics, but they tend to not interested to political issues. According to FGD, they see political news as heavy, complicated and boring.

They prefer news that is soft and those that they can relate, such as about lifestyle, movies and technology.

Intensity in Following Political News (%)



*(“,” equals to “.” or coma)

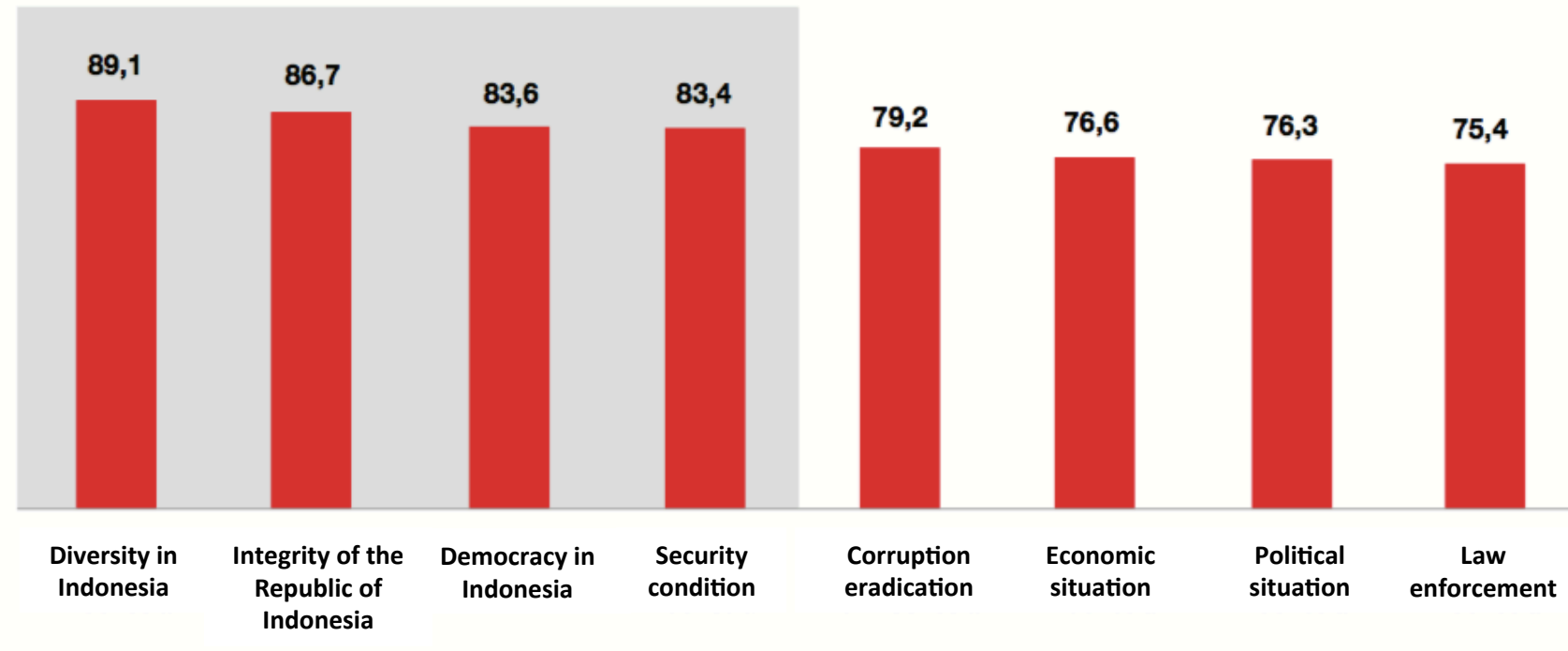
Point of View Toward Indonesia

89.1% Millennials are feeling optimistic toward diversity in Indonesia.

Some aspects that haven't gone well are:

- Economy
- Politic
- Law enforcement

Optimism Toward Indonesia in the Next 1 Year(%)



*(“,” equals to “.” or coma)

Satisfaction Toward Government's Performance

In general, Millennials are satisfied with the Government's performance

Which aspects of Government's works that they appreciate the most?

- + Internet & telecommunication (90.1%)
- + Education service (88.4%)
- + Public transportation service (88%)
- + Infrastructure development (85.5%)
- + Health service (80.3%)

Which aspects of Government's works that they satisfied the least?

- Economic condition (59.5%)
- Labour welfare (58.6%)
- Ease of employment (49.1%)
- Poverty reduction (49.7%)
- Price stability of basic necessities (46.4%)

Perception Toward Political Party

70% Millennials choose figures, not party.

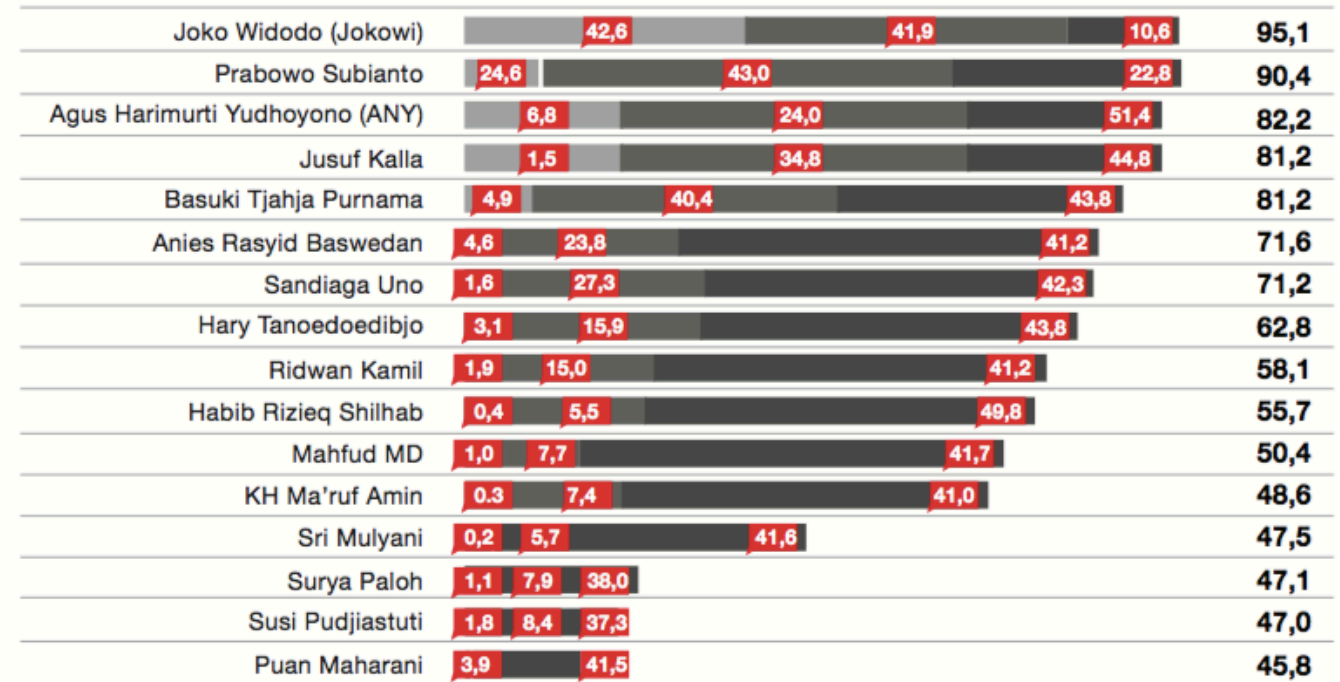
What do they consider when choosing political party?

The top four are:

- Close to people
- Good programmes
- Ability to bring changes
- Free from corruption

“Today’s young people are more likely to appear of the stage of self-actualization for self-recognition, rather than being in the chambers of suffering (political struggle)” – M. Nur Arifin, Trenggalek District Head.

Political figure awareness (%)



● Tom ● Spontan ● Prompted

Voting for Election

Factors to consider when voting for political leaders

Factor	Ranking
Honest	1
Close to people	2
Free from corruption	3
Able to make changes	4
Good skills and capacity	5
Prestigious	6
Have leadership skill	7
Able to solve problems	8
Intellectual/clever/smart	9
Hard working	10
Firm	11
Religious	12
Integrity	13
Young figure	14
Nationalist	15



Closing

- **Millennial activity are digital-based.** Starting from culinary and traveling destination reference to purchase of daily goods are done online. **With such behaviours, millennials are ready to bring Indonesia to digital-era.**
- **Millennials are productive and not afraid to start their own business.** Salary is no longer the main reason to stay at the job. For them, opportunity for self development and feeling comfortable in doing their work are the main priorities. They are also happy when they are given a space to develop creativity further. They have multitasking ability when working. These characters serve a capital for strengthening Indonesia's economic independence in the future, including creative economy industry.
- **Millennials have cross-border Network.** Millennials are a connected to each other. Through social media, their access to information and friends are getting wider. Apart from access to communicate and exchange information, they can voice their opinion through social media. They can even develop social empathy and solidarity through social media. **They have a strong foundation to maintain solidarity and peace in Indonesia.**
- **Millennials are nationalist without political interest.** They are not interested to politics, yet they have **commitment and concern to improve and protect Indonesia.**

