

YAHOO!



# Digital Indonesia: Internet Media Habits Decoded

Net Index 2009 Highlights

Jakarta, Indonesia  
20 March 2009

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## Yahoo!-TNS Net Index 2009

- Media insights play a critical role in connecting your brand meaningfully to your target audiences
- The internet is an important, fast-growing medium in Indonesia; but insights on Indonesian internet users remain limited
  - Frequent requests for more research and data from media planners and brand marketers
- Yahoo!-TNS Net Index initiative is the first-ever in-depth study of Indonesian internet users across 8 urban cities
  - Beyond internet media habits
  - ‘Big picture’ overview covering cross-media habits, lifestyles, psychographics to brand preferences

Elevate industry understanding of the internet medium in Indonesia



# Research Design

- **Methodology** Personal face-to-face interviews using two-part structured questionnaires
- **Area Coverage** Jakarta, Botabek, Surabaya, Bandung, Medan, Semarang, Palembang and Makassar
- **Respondents** Males and Females aged 15-50 years old from SES ABC households who have used the internet in the past month
- **Sample Size** 2,000 (General Media Survey)  
1,021 (Internet Media Survey)
- **Sampling Approach** Multi-stage Probability Sampling
- **Fieldwork Period** December 2008



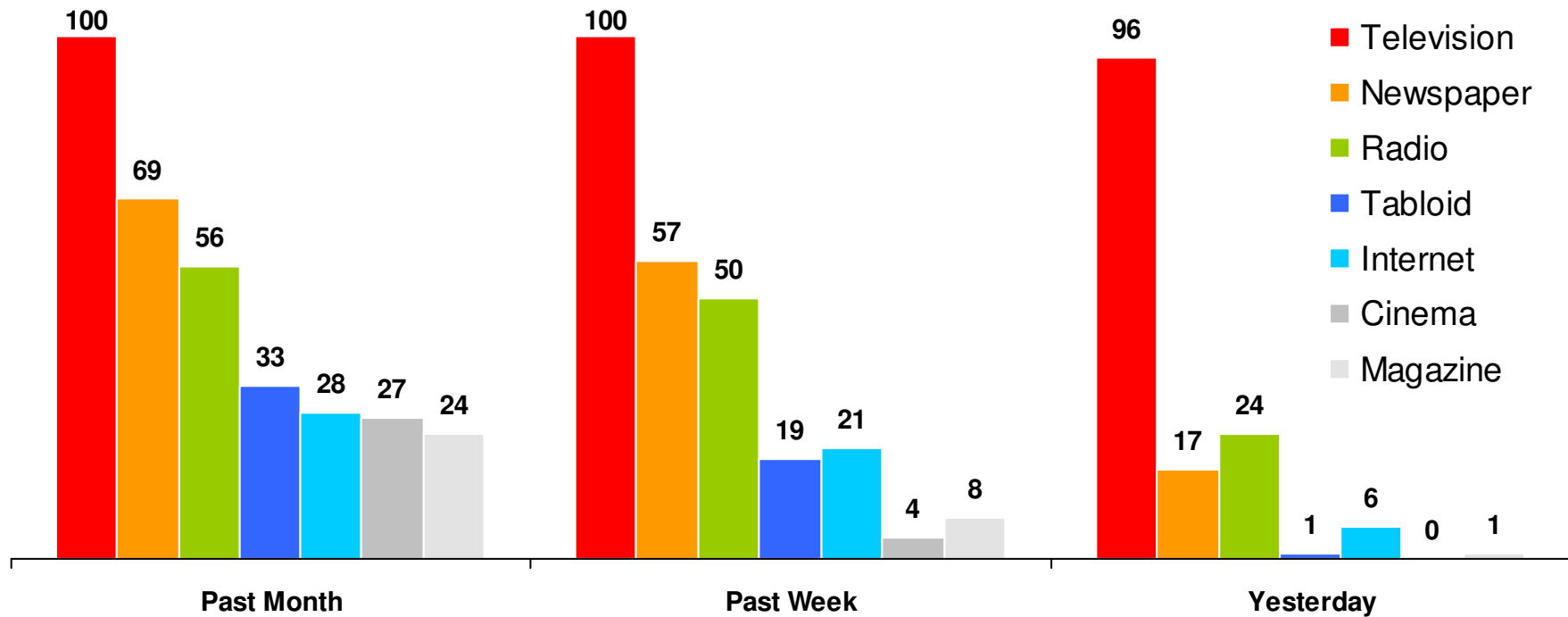
## Study Scope

- Internet User Profile
- Internet Access, Usage & Activities
- Internet Front Pages
- Search Engines
- Instant Messengers
- Web-based Email
- Social Networking & Community Sites
- News sites
- Music sites
- Mobile Internet
- Cross Media Usage (including TV, Print and Radio)
- Product Consumption & Brand Preferences
- User Psychographics & Attitudes



# Media Usage

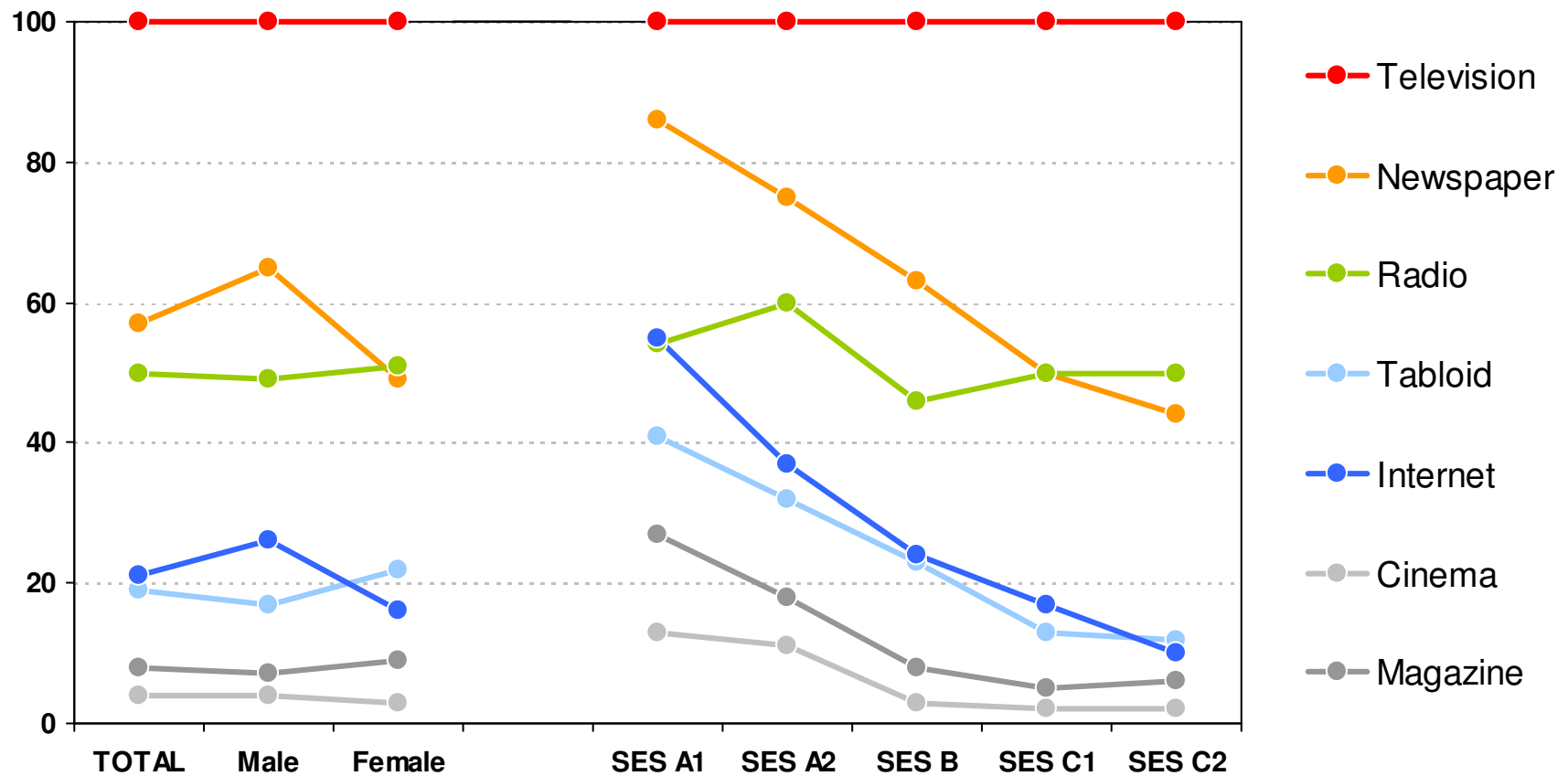
Reach (%)





# Different targeting opportunities...

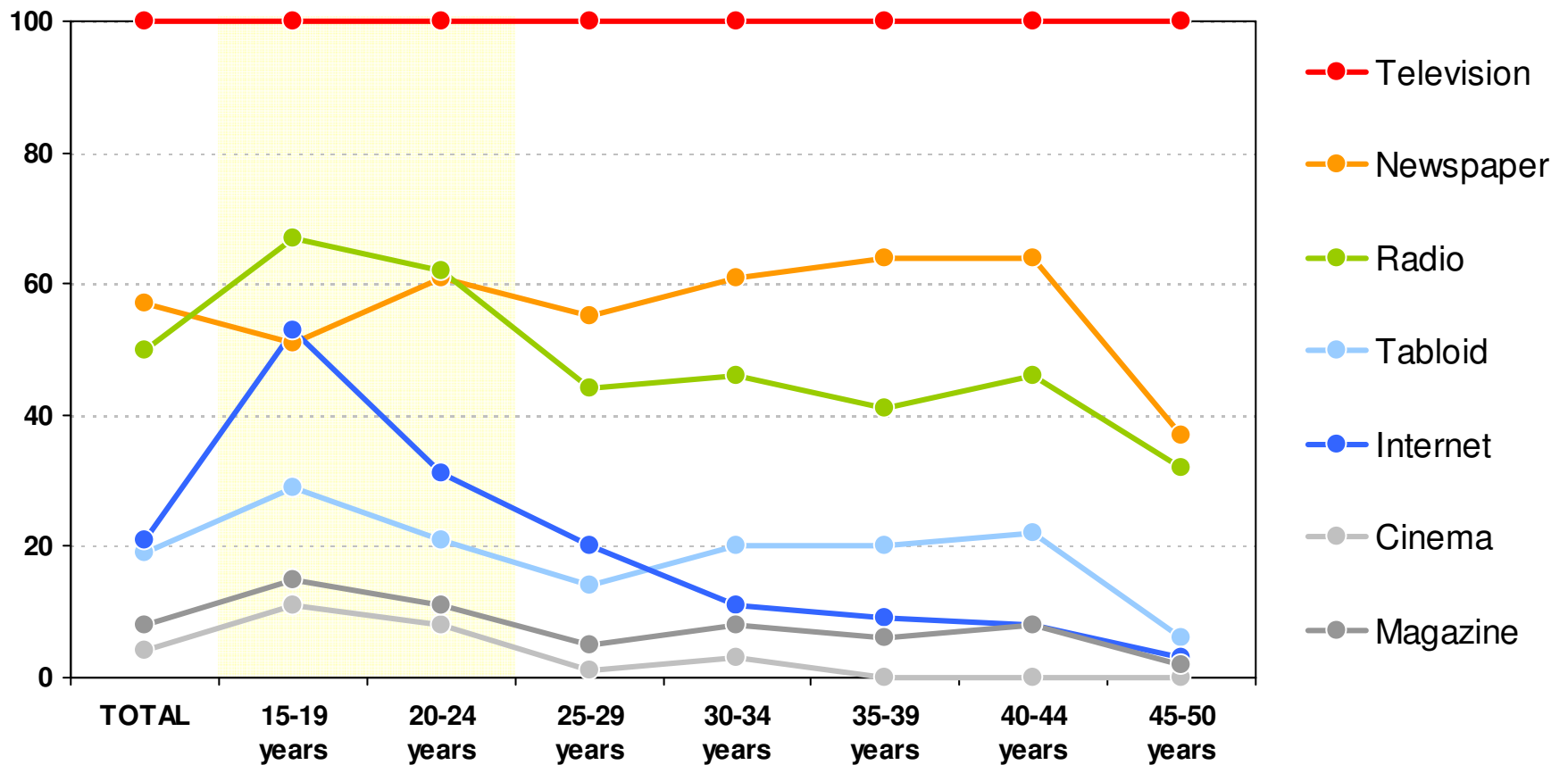
Past Week Reach (%)





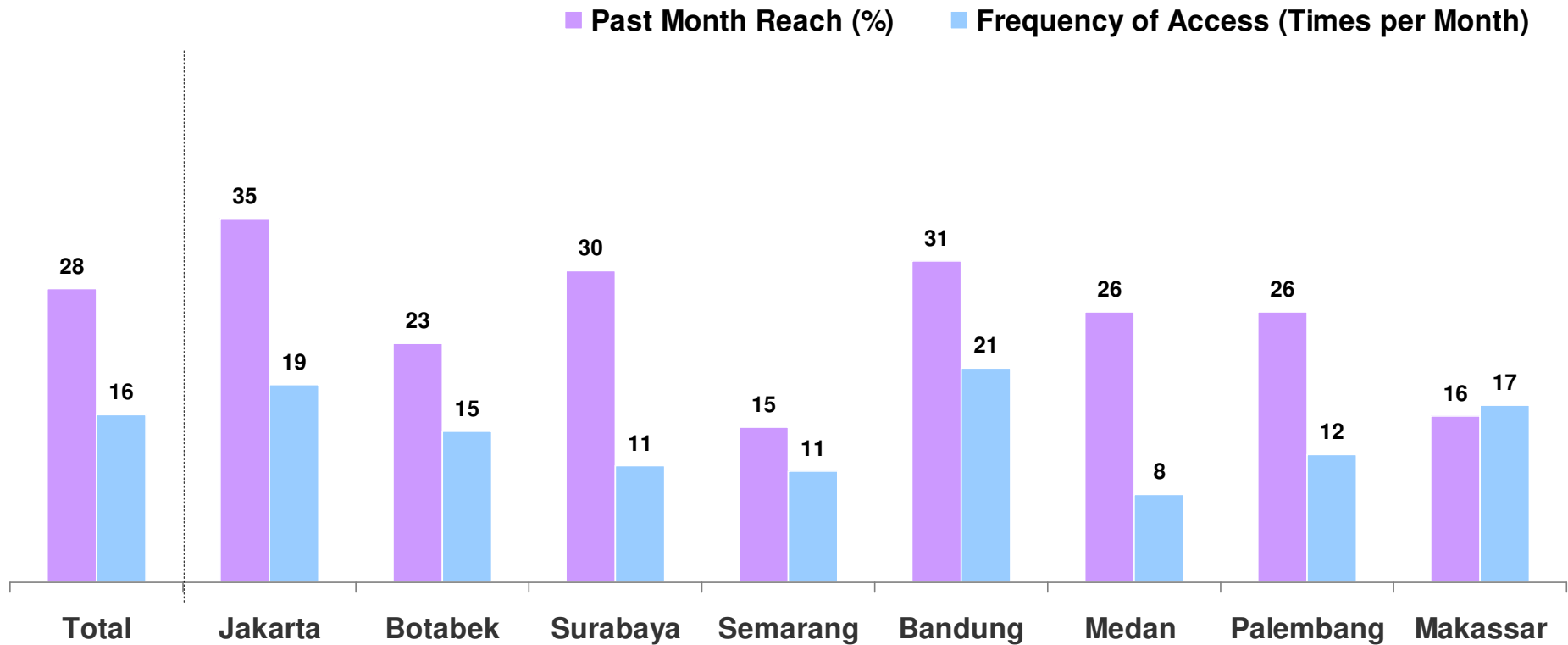
# Internet - strong affinity with Indonesian youth

Past Week Reach (%)



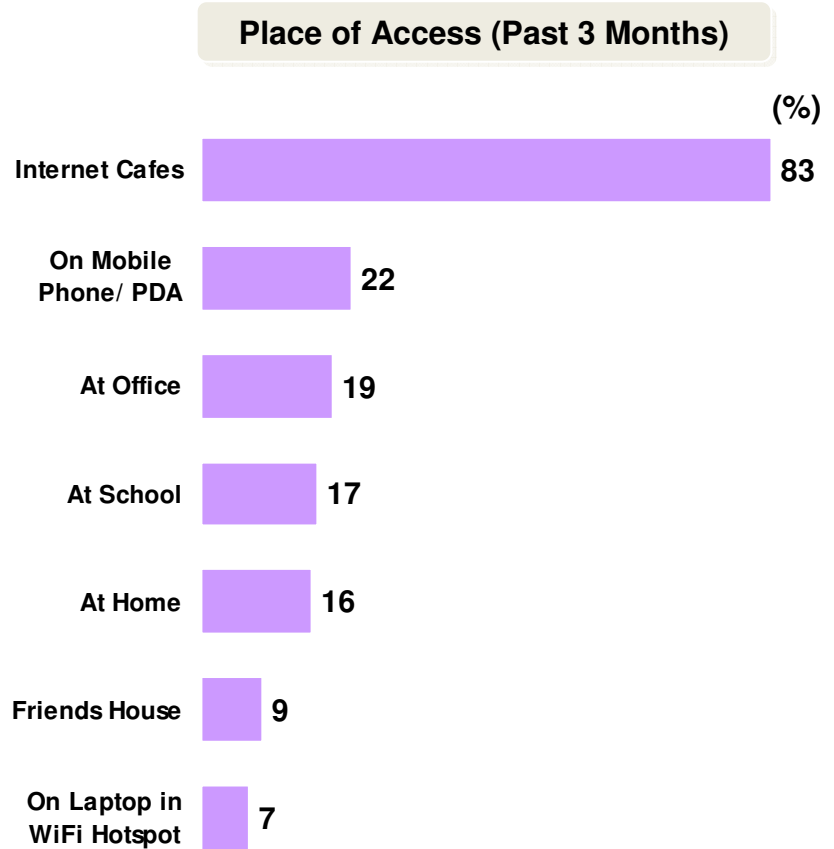


# Not just a Jakarta phenomenon...





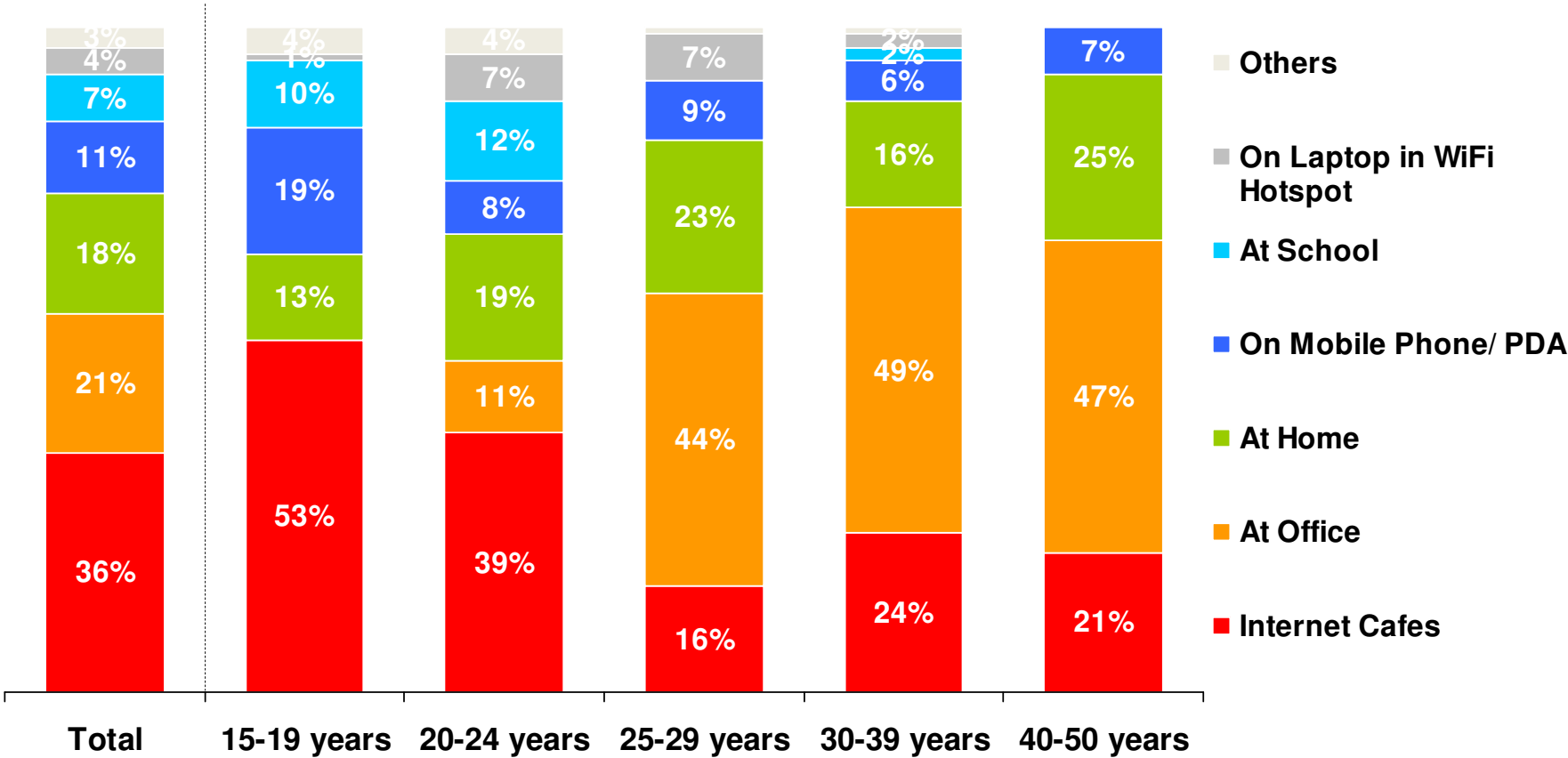
# 8 out of 10 access the internet from the warnets



Base: 1021 past month urban internet users aged 15-50 years old from SES ABC households  
 Source: Yahoo!-TNS Net Index Indonesia 2009  
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# Youth spend most of their internet time at the warnets

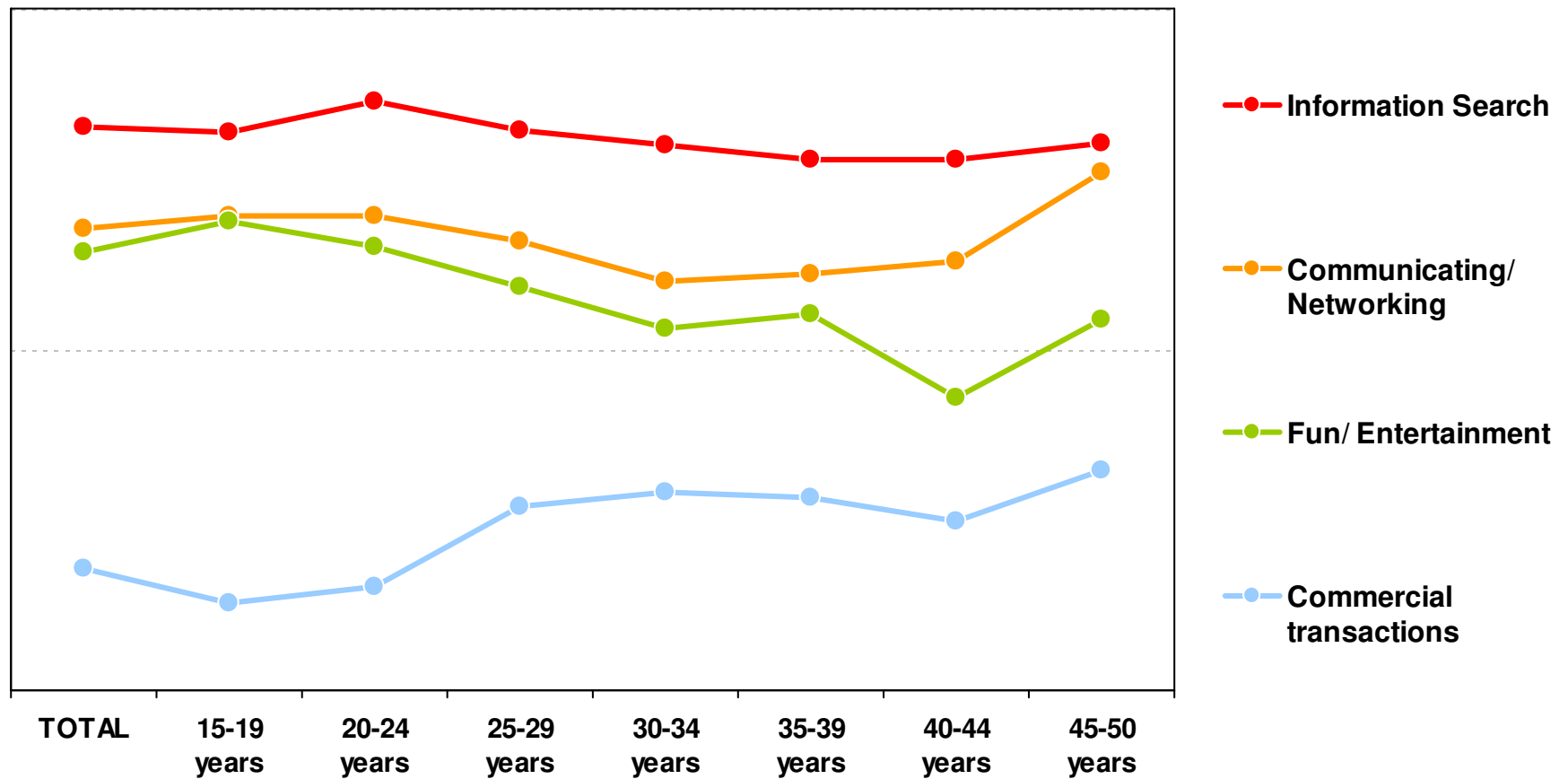


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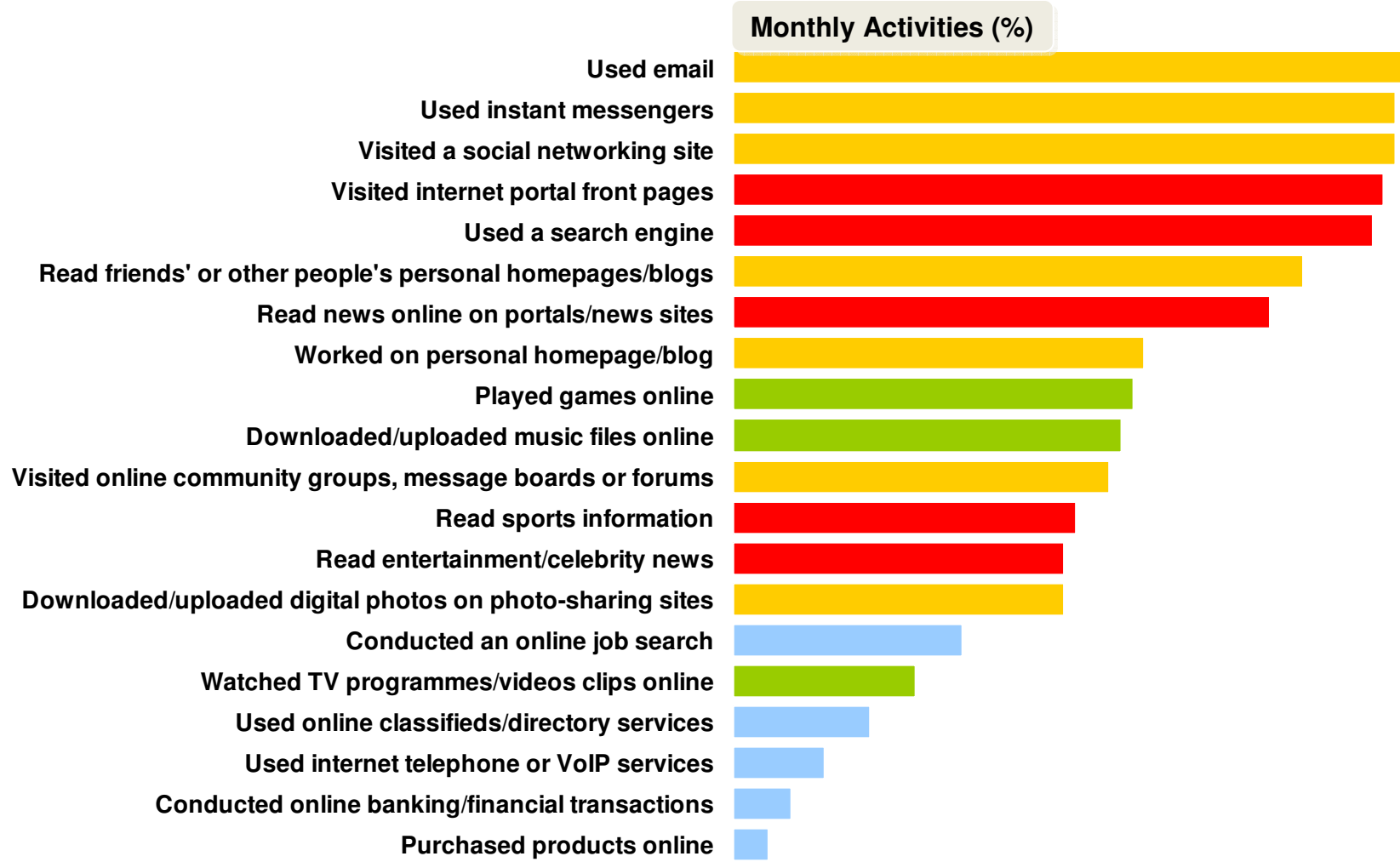
# Differing web motivations...

Web Motivation Scores





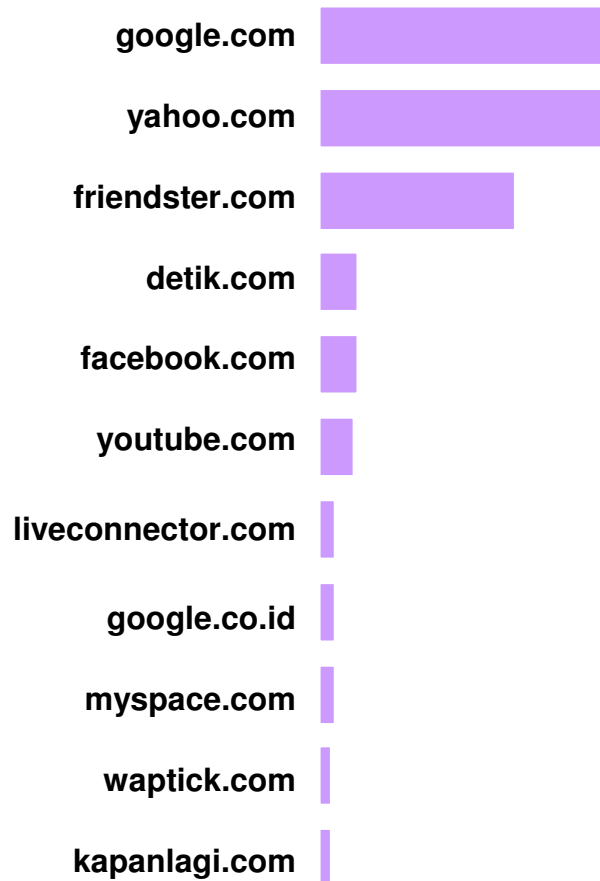
## ... drive different online behaviour





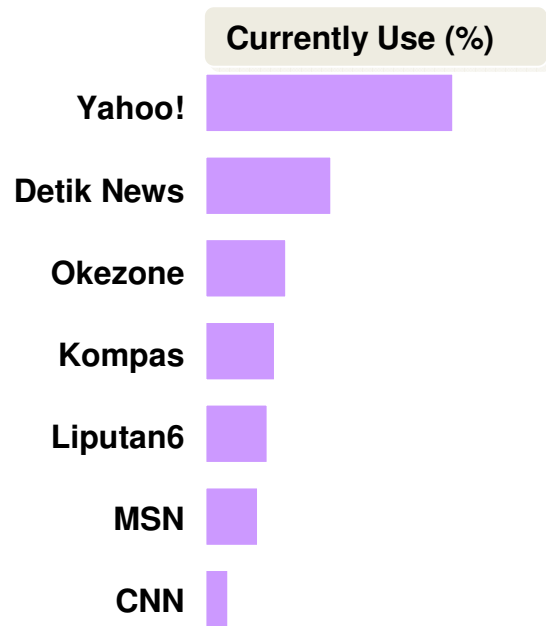
# Most visited websites

Most Often Visit (%)

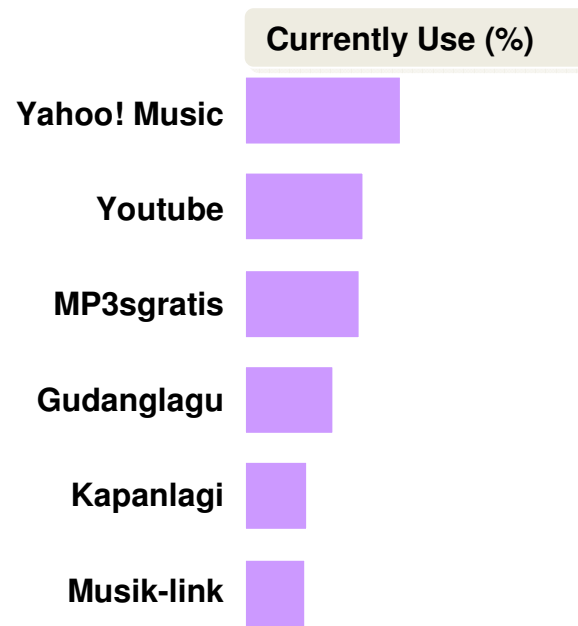




## News Sites

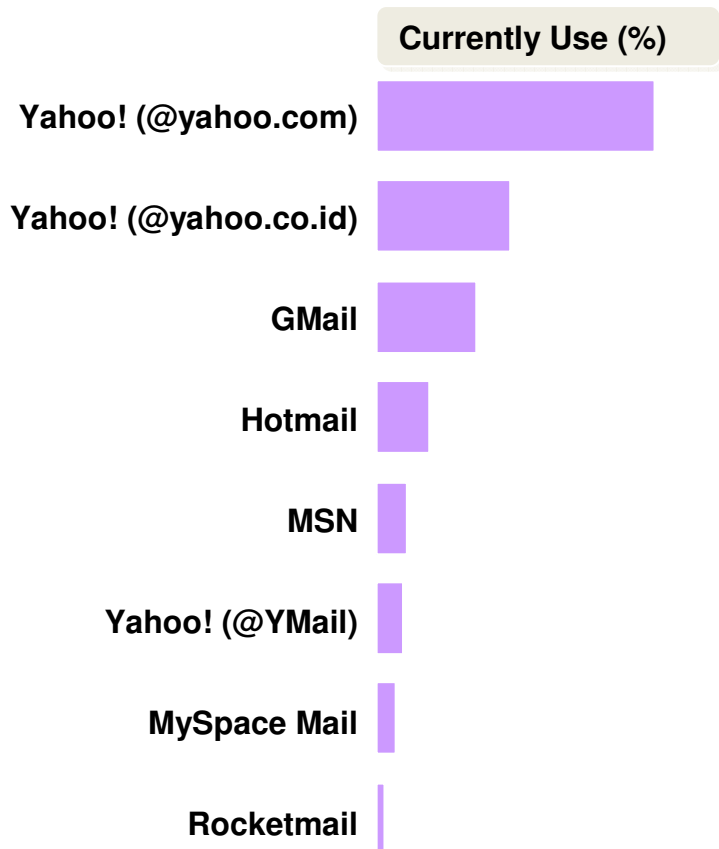


## Music Sites

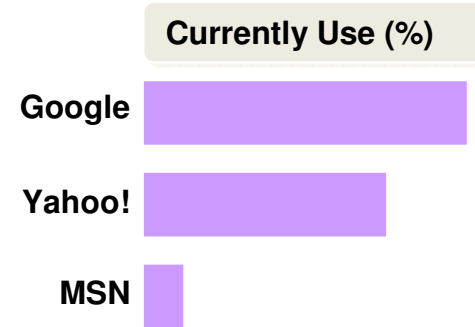




## Web-based Email



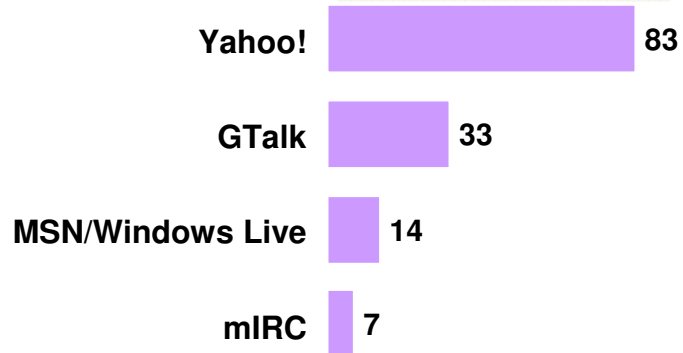
## Search Engines



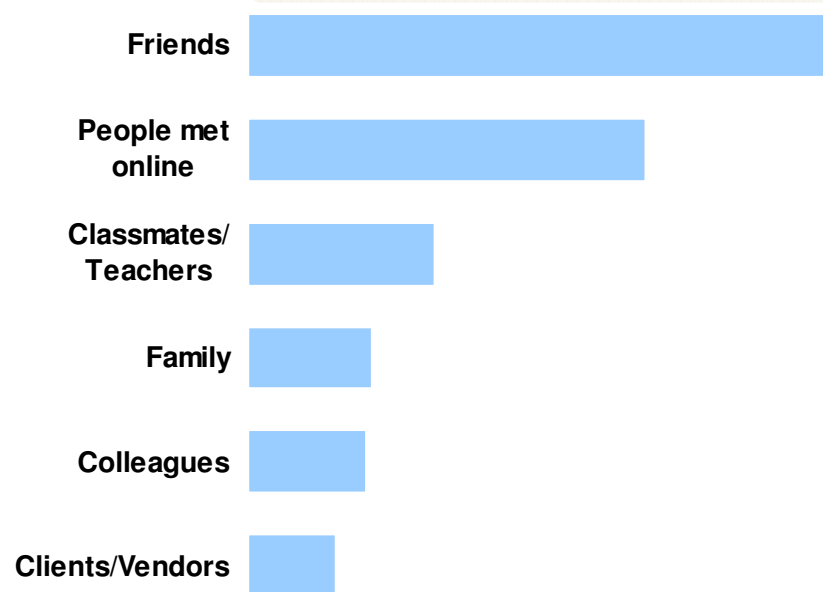


# Instant Messengers

Currently Use (%)

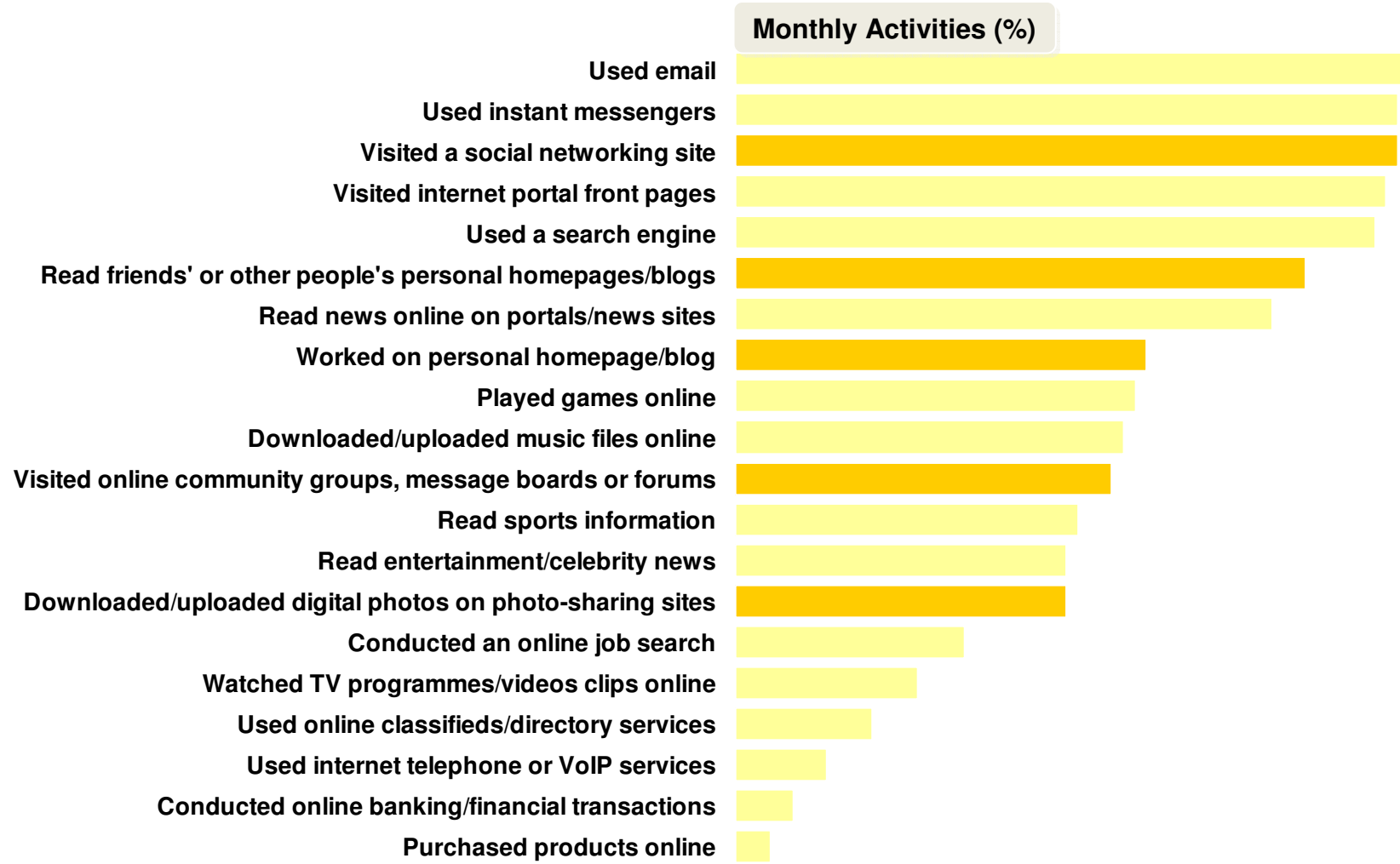


People Communicating with (%)



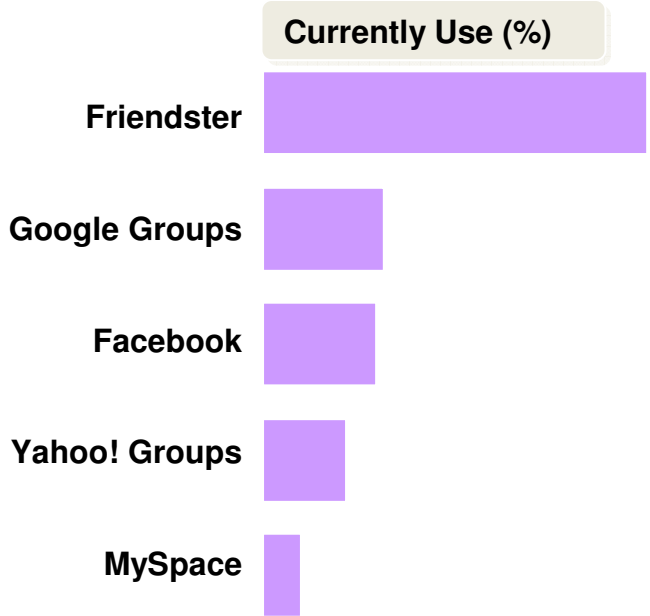


# Rising popularity of social networking





# Social Networking Sites



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