

# BBG Research Series



GALLUP®



## Media Use in Indonesia 2012

Mobile Usage Soars, but TV Still Dominates



# Media Use in Indonesia

Findings from the 2012 International Audience Research Project



# Survey Background and Conditions

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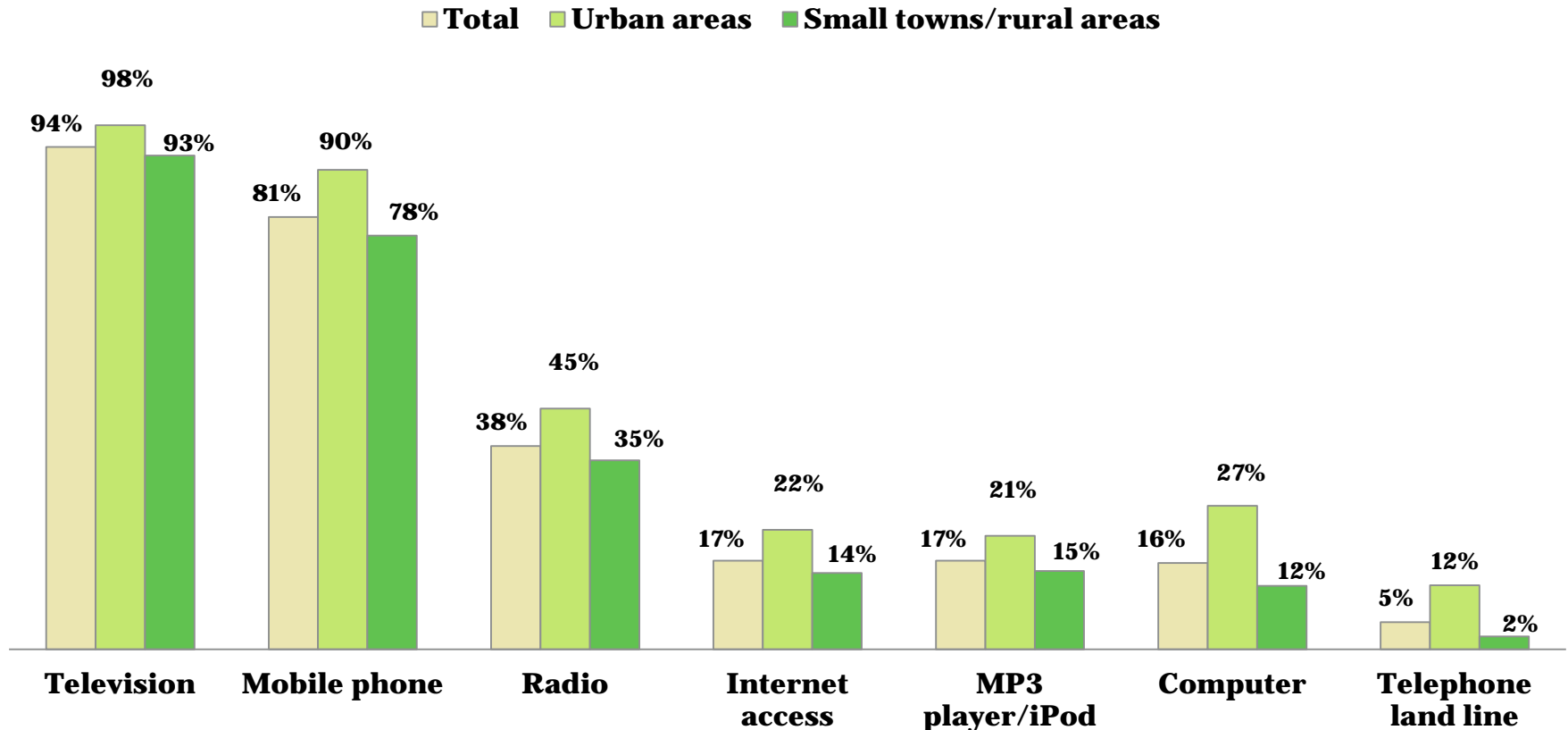
- Target population: Adults 15 and older living in households
- Population Coverage: 93% of adult population in Indonesia
- Sample size: 3,000 nationally representative, oversample in Jakarta
- Language: Indonesian
- Methodology: Interviews were collected face-to-face in respondent's home
- Field Period: July 4<sup>th</sup> – Aug 2<sup>nd</sup> , 2012
- Response rate: 74%



# Media Usage Patterns

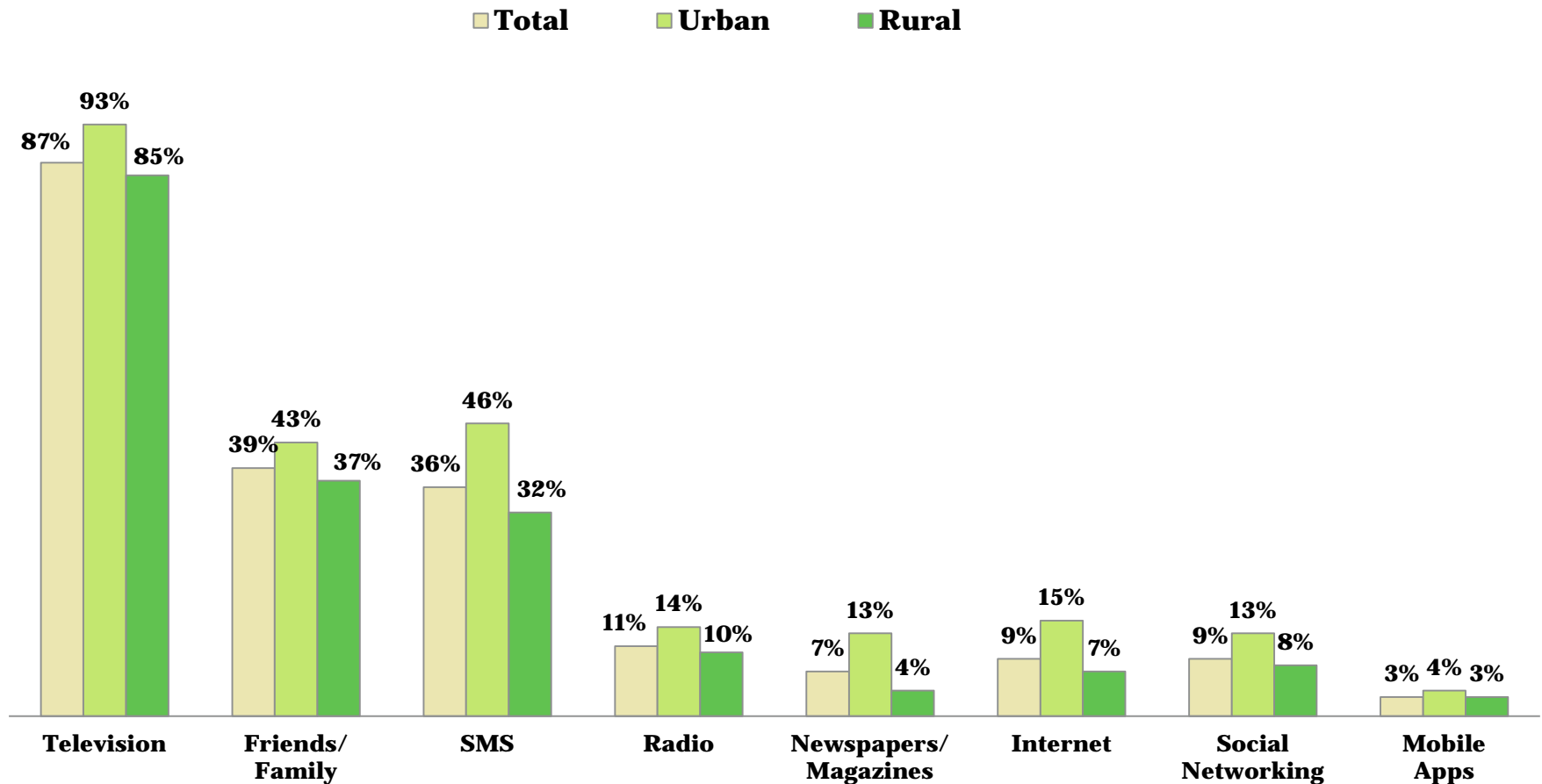
# Television and Mobile Phones are most popular in Indonesian households

*Which of the following do you have working in your household?*



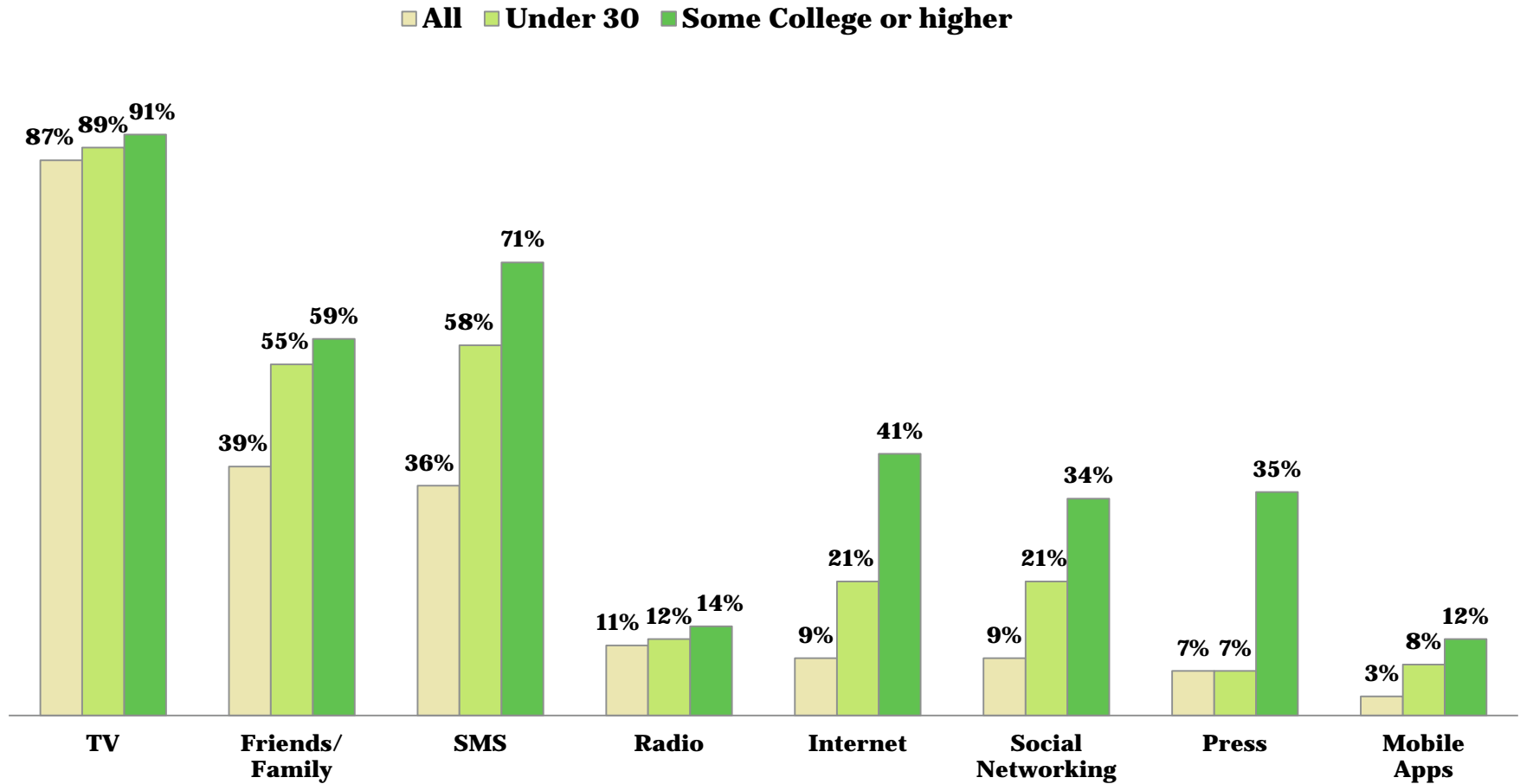
Base: All respondents, N=3000

# Daily Use of Media Platforms for News



Base: All respondents, N=3000

# Daily Media Use for News, by Demographic



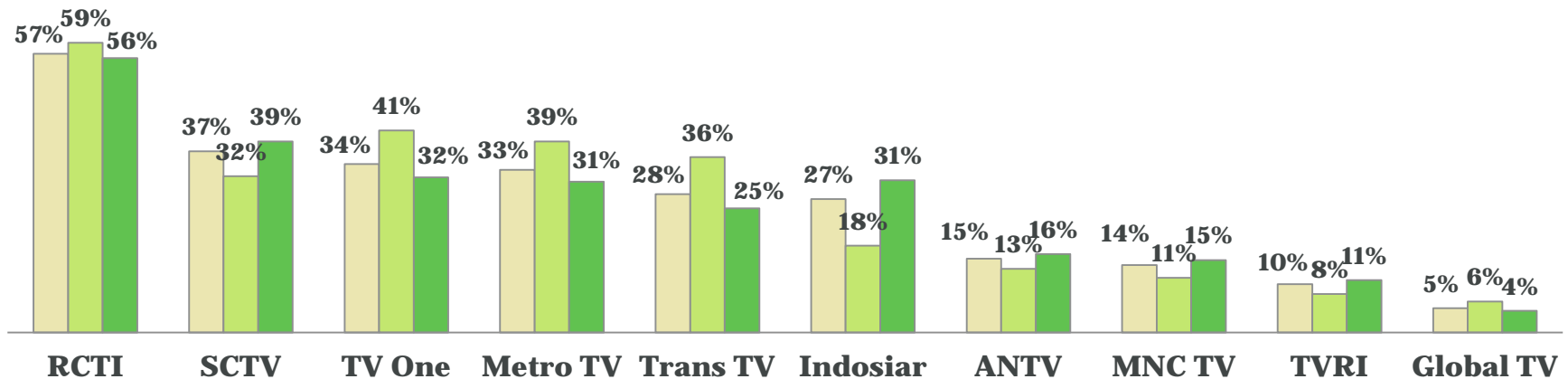
Base: All respondents, N=3000



# Most Important Information Source (net)

*Which stations, publications, or sites are your three MOST important sources of information?*

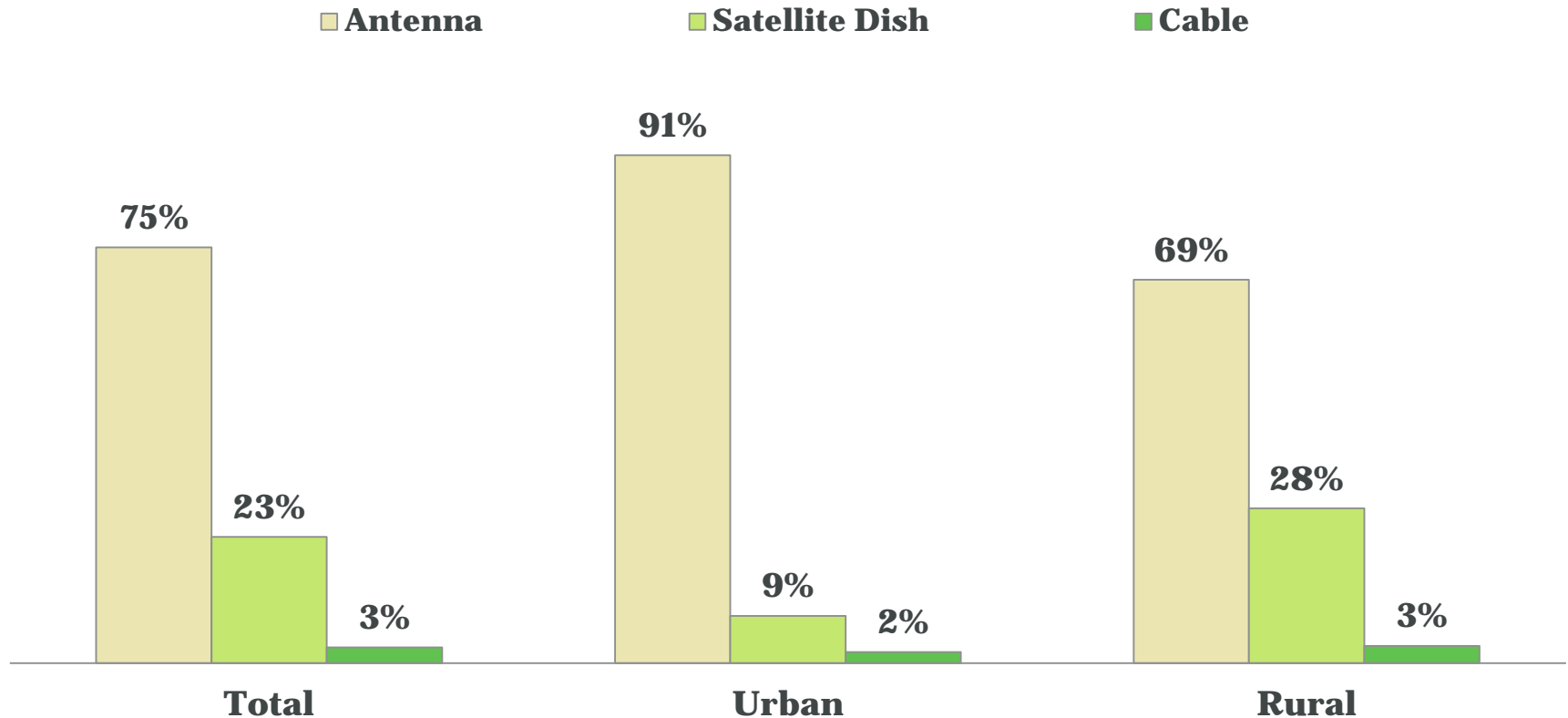
■ Total ■ Urban ■ Rural



Base: All respondents, N=3000

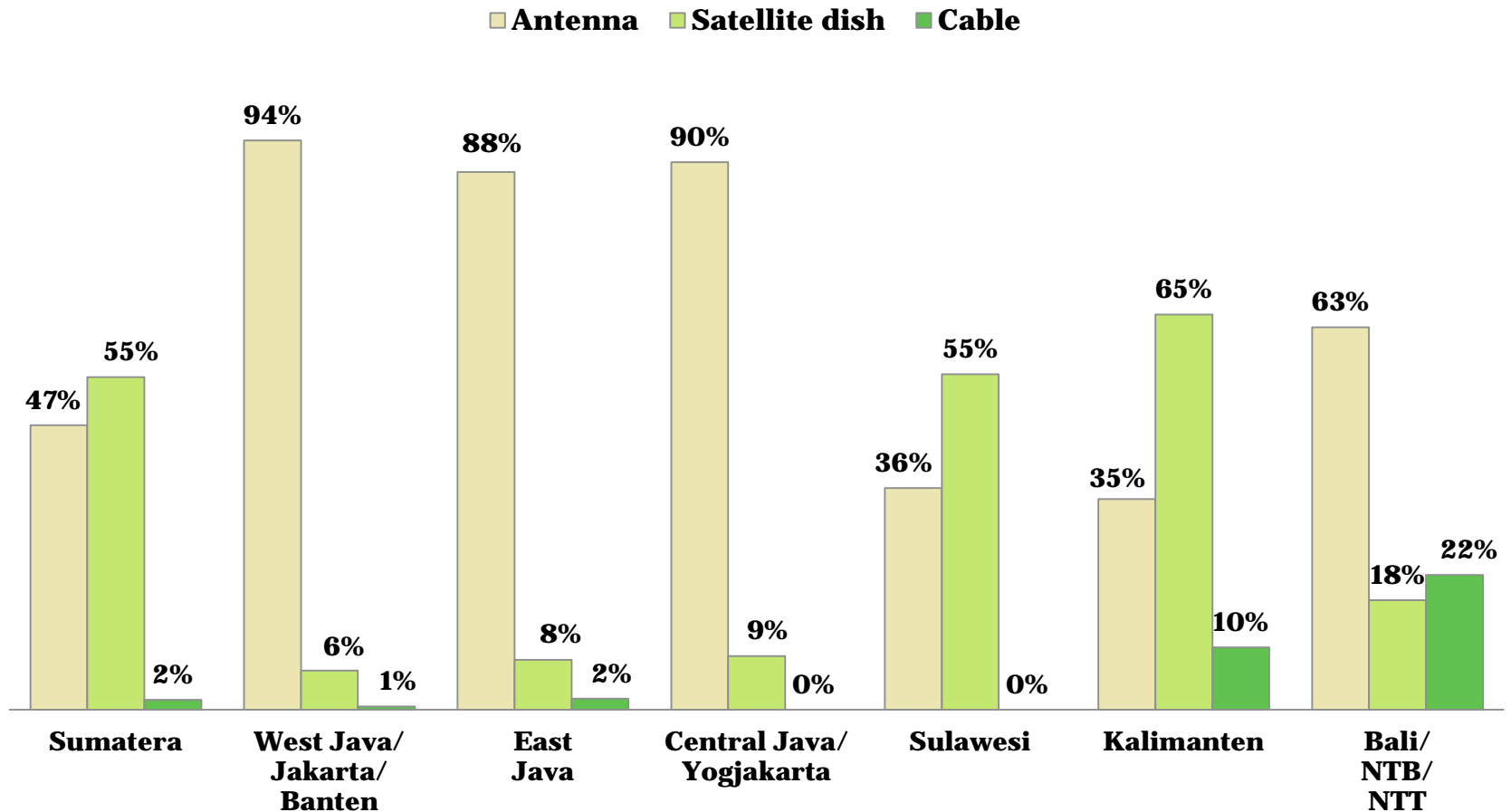
# Satellite Dish More Prevalent in Rural Areas

*How does your television receive its signal?*



Base: Those with TV, N=2783

# Significant Regional Difference in TV Signal Access

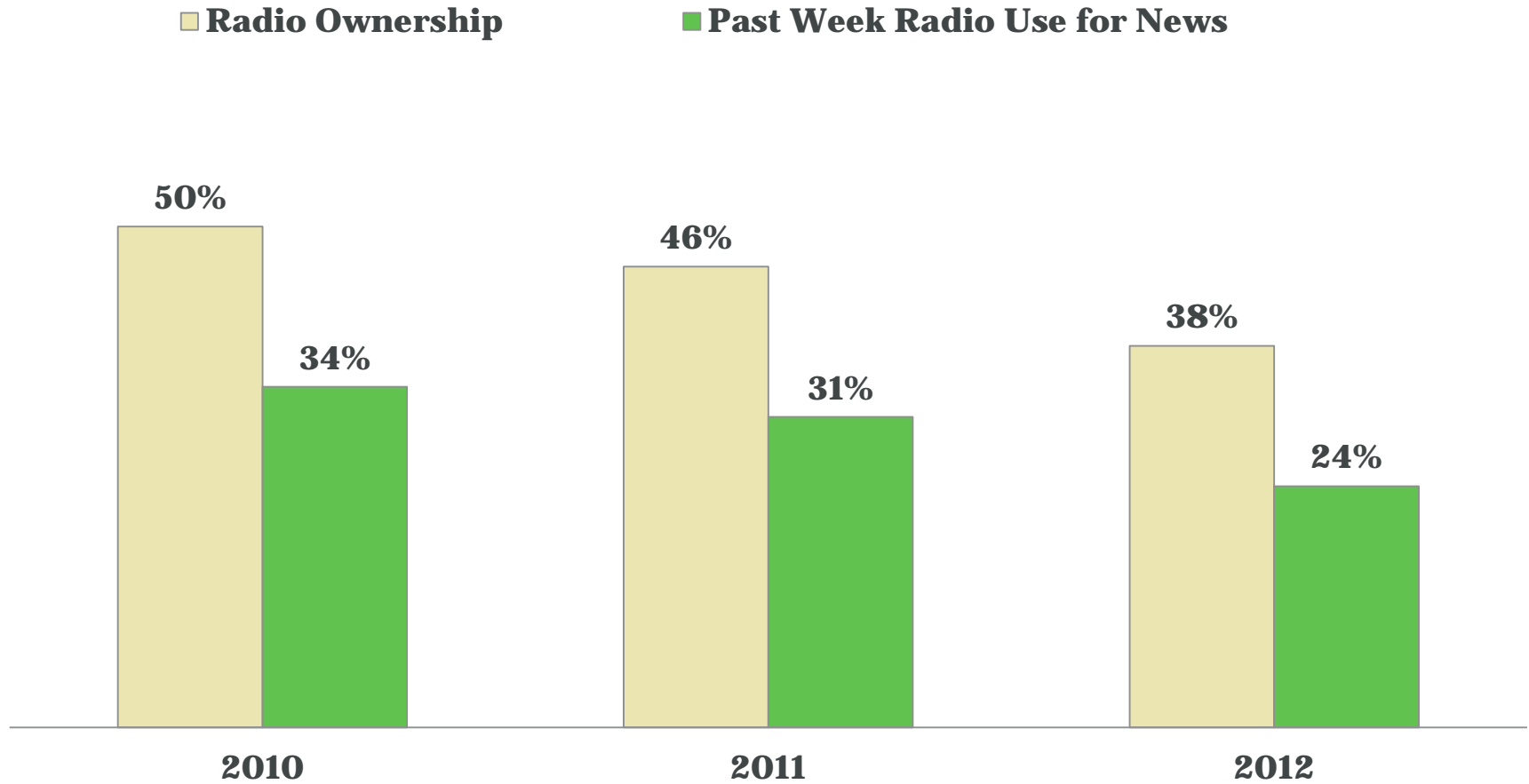


Base: Those with TV, N=2783



# Trends in Access and Usage

# Radio ownership and its use for news continues its decline

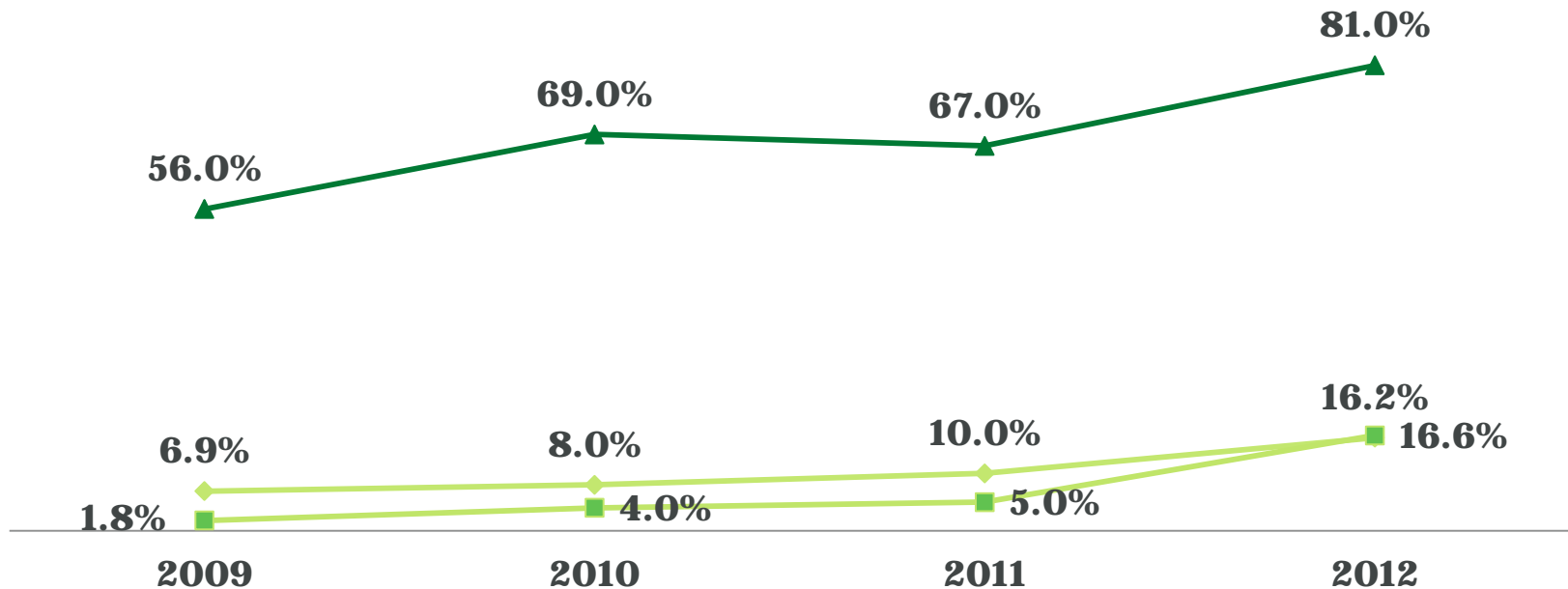


Base: All respondents, N=3000,

# Significant Growth in New Media Access

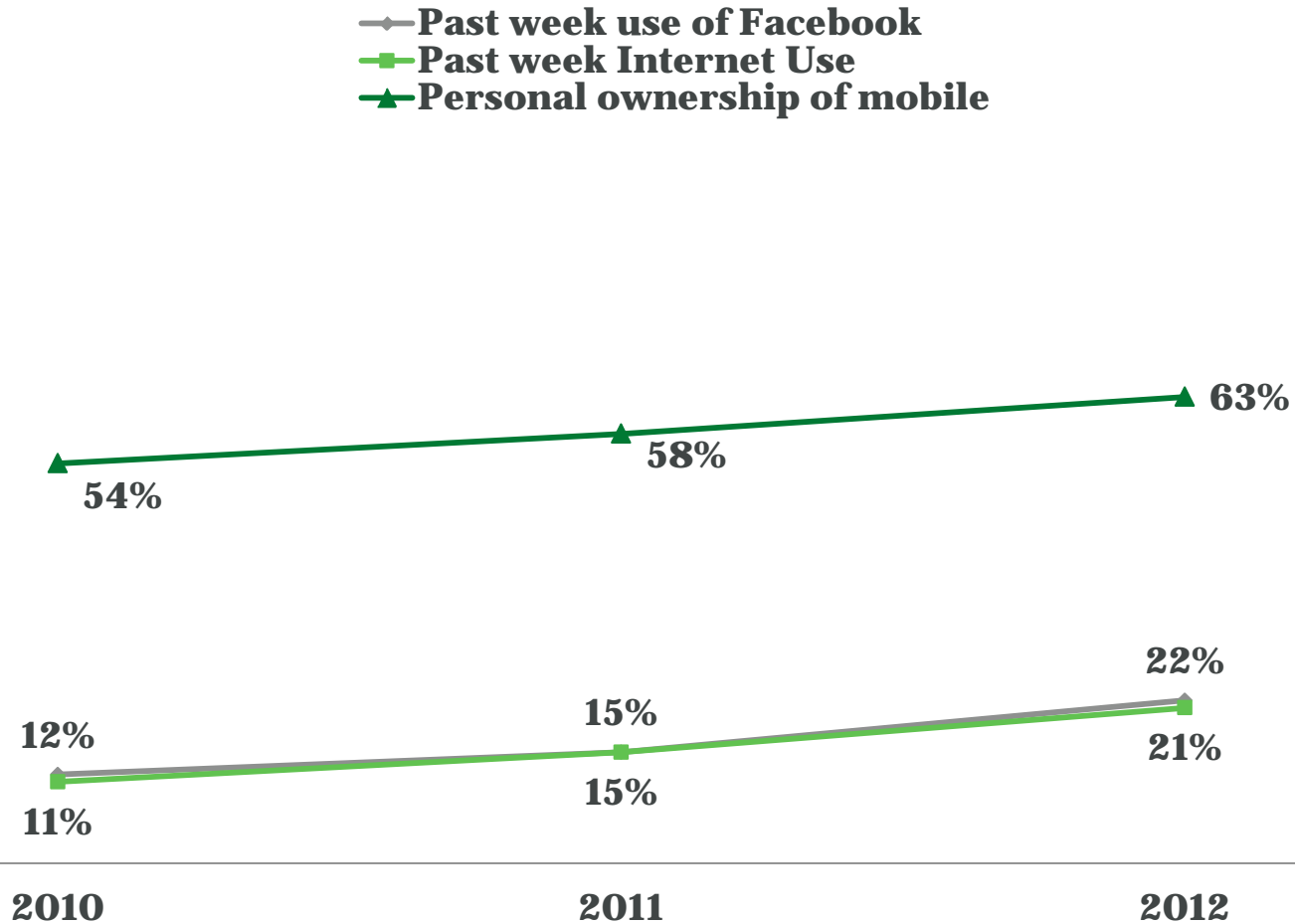
*Which of the following do you have working in your household?*

◆ **Computer**   ■ **Internet access**   ▲ **Mobile phones**



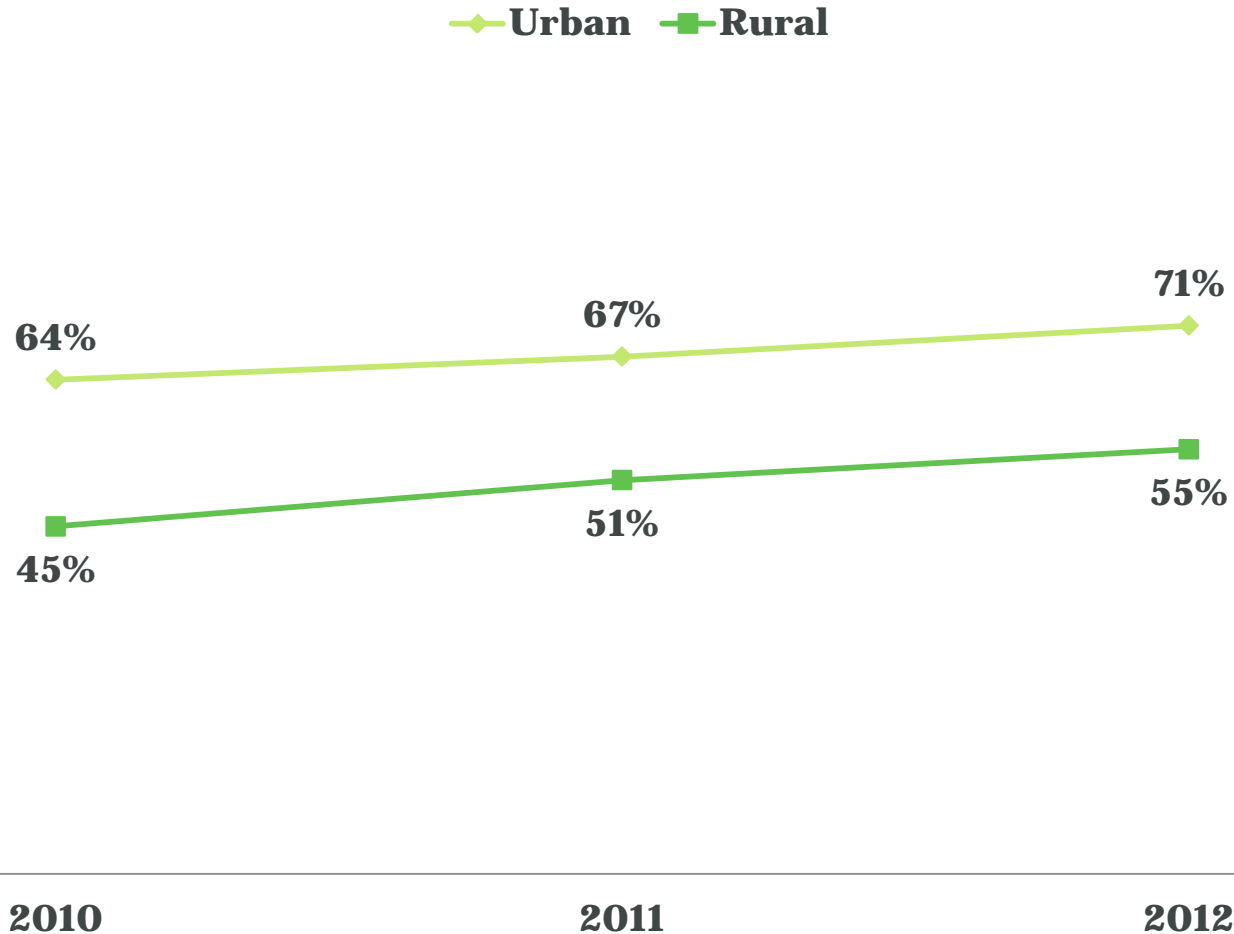
Base: All respondents, N=3000,

# New Media Usage Trends



Base: All respondents, N=3000,

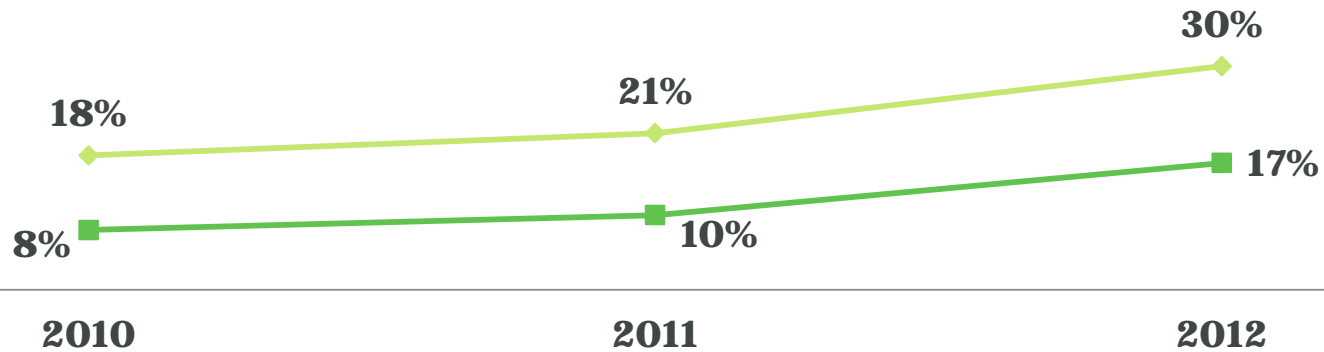
# Mobile Ownership Trends, by Urbanicity





# Past Week Internet Usage Trends, by Urbanicity

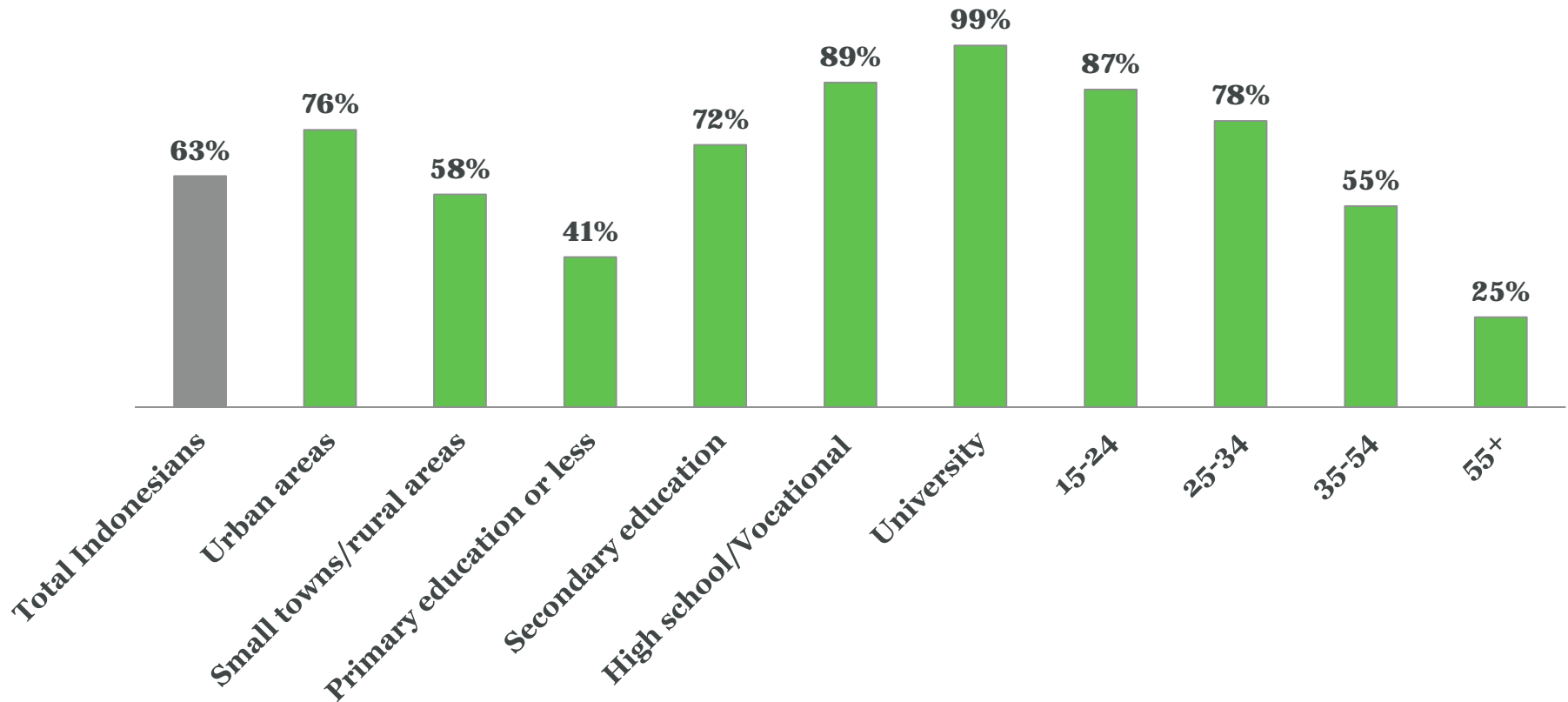
◆ Urban ■ Rural



# Mobile

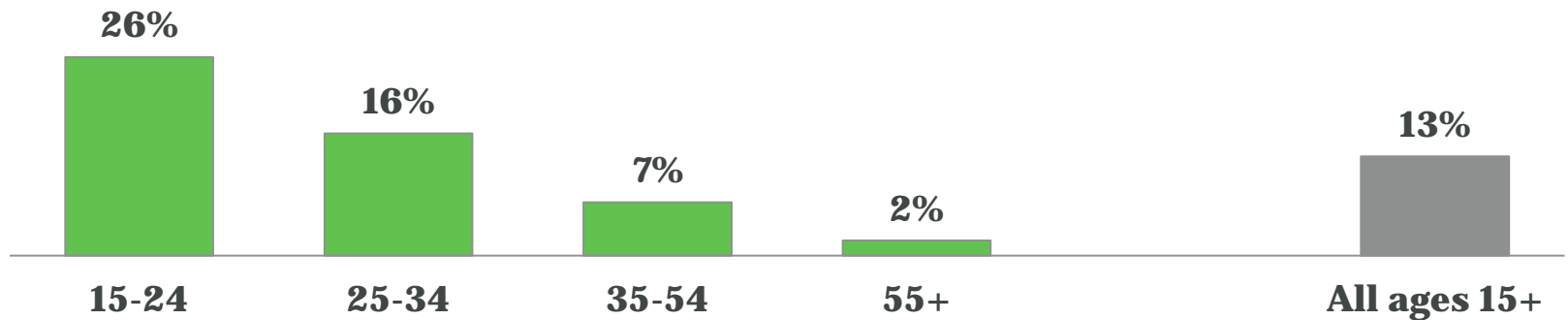
# Personal Mobile Phone Access Most Prevalent Among Young And Most Educated

*Percentage who report having a personal mobile phone*



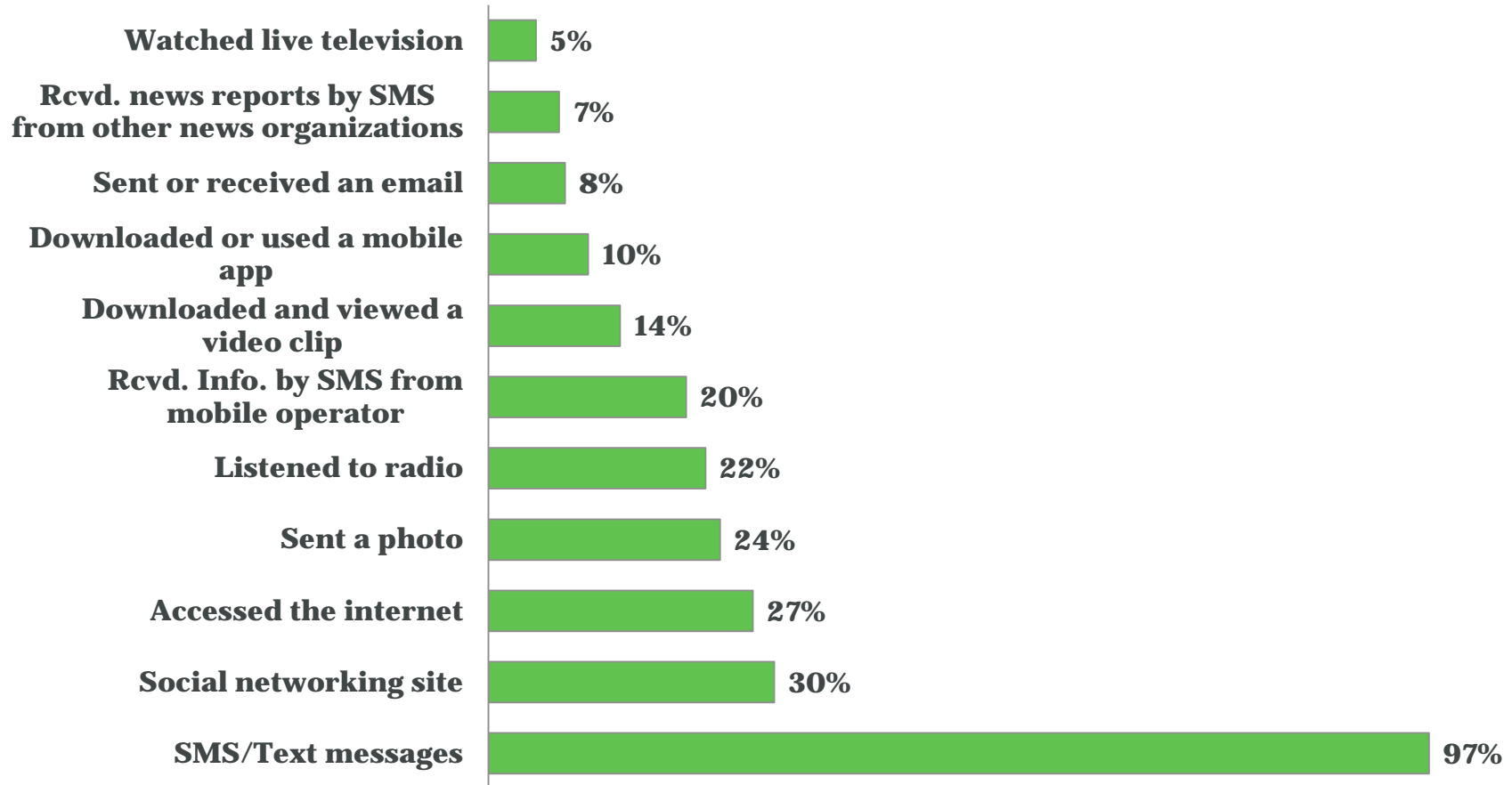
Base: All Respondents, N=3000

# Reported Smartphone Ownership, by Age



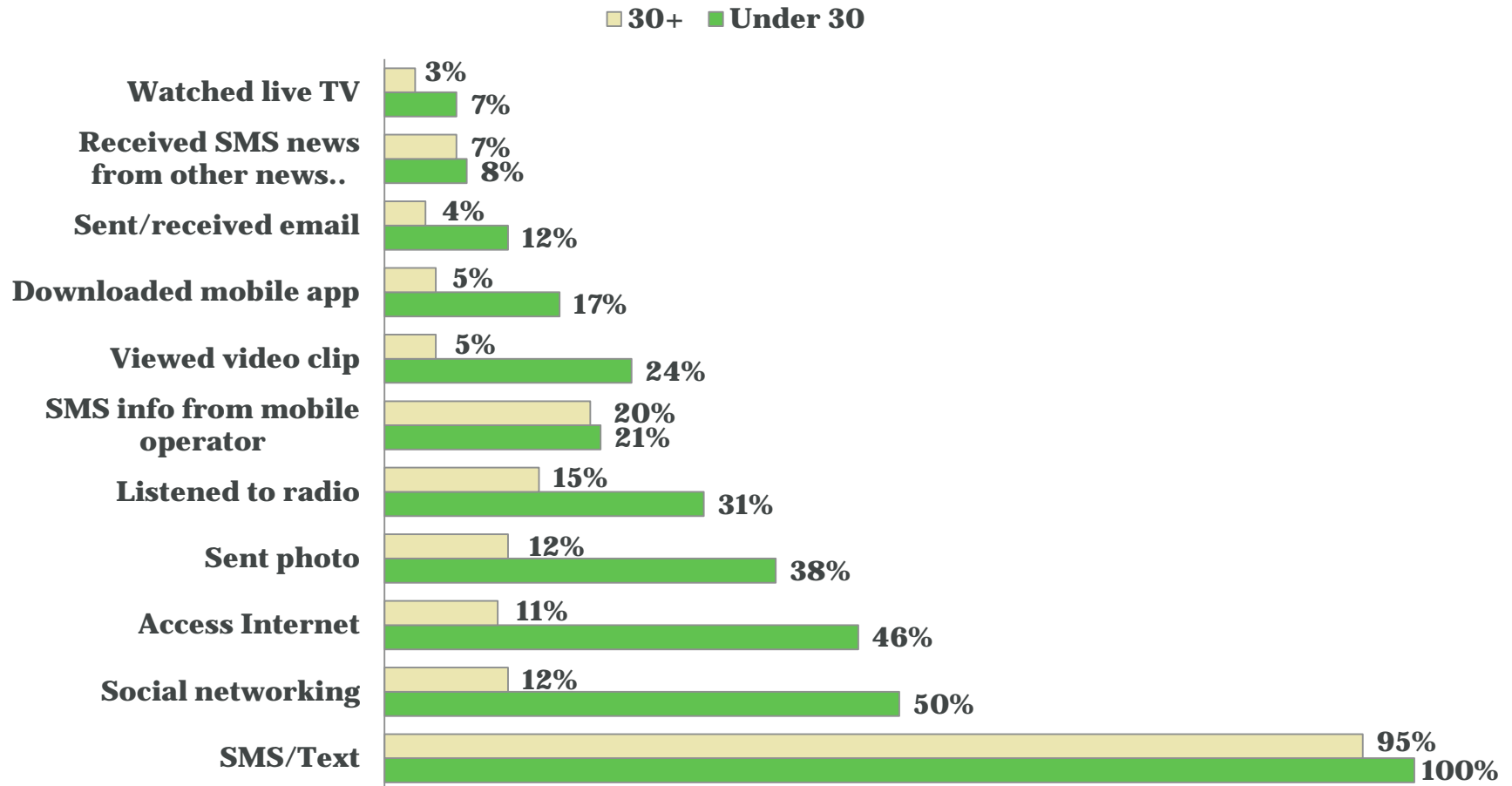
Base: All Respondents, N=3000

# SMS and Text Messaging Most Common Use of Mobile

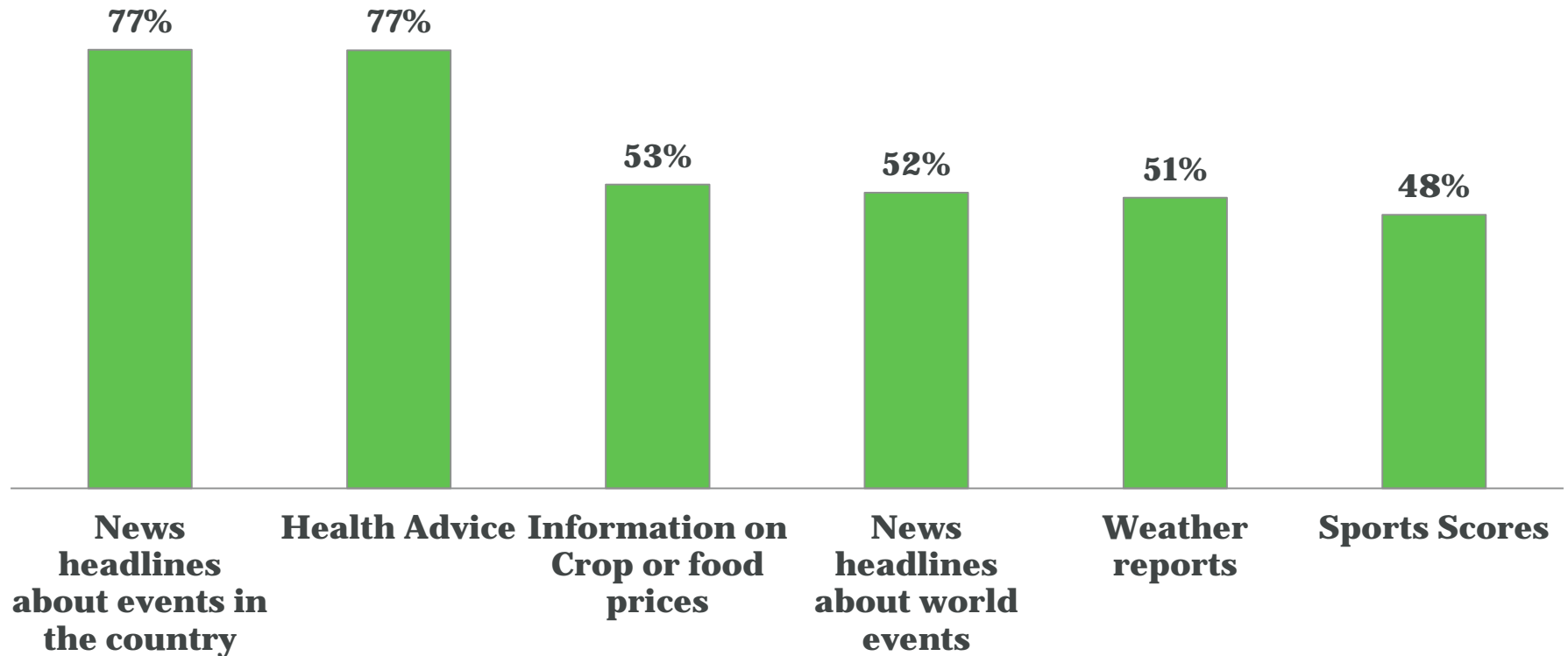


Base: Those who have a personal mobile phone N=2,083

# Past Week Mobile Activities, by Age



# Information Would Like to Receive Through SMS Without Any Cost To Individuals

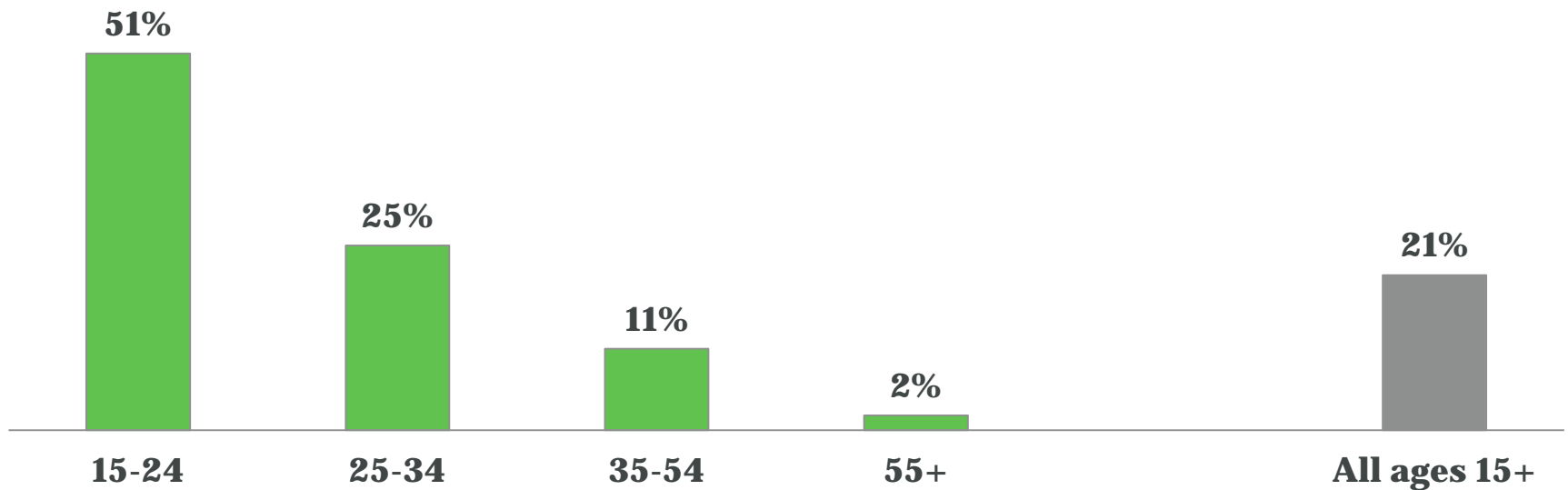


Base: Those who have a personal mobile phone N=2,083

# Internet



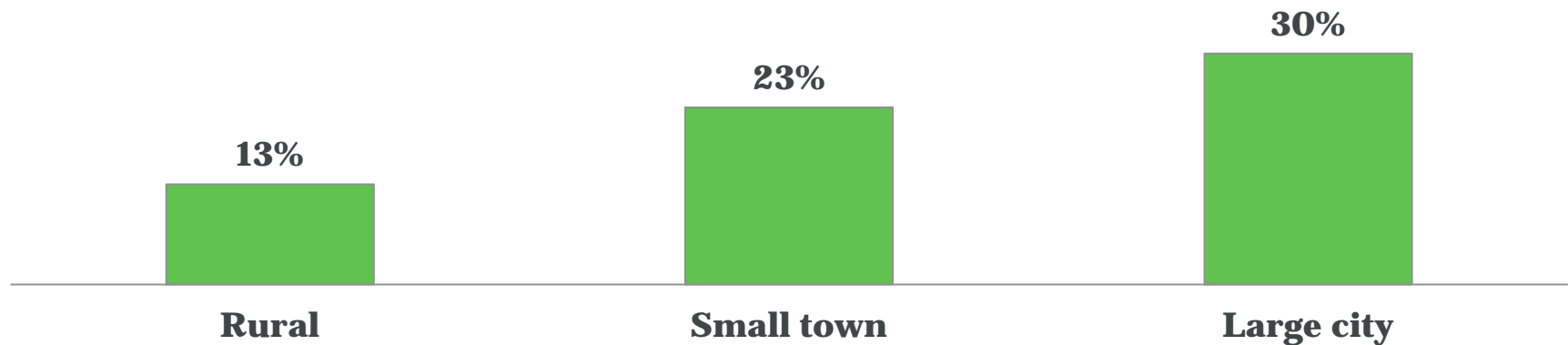
# Past Week Internet Use, by Age



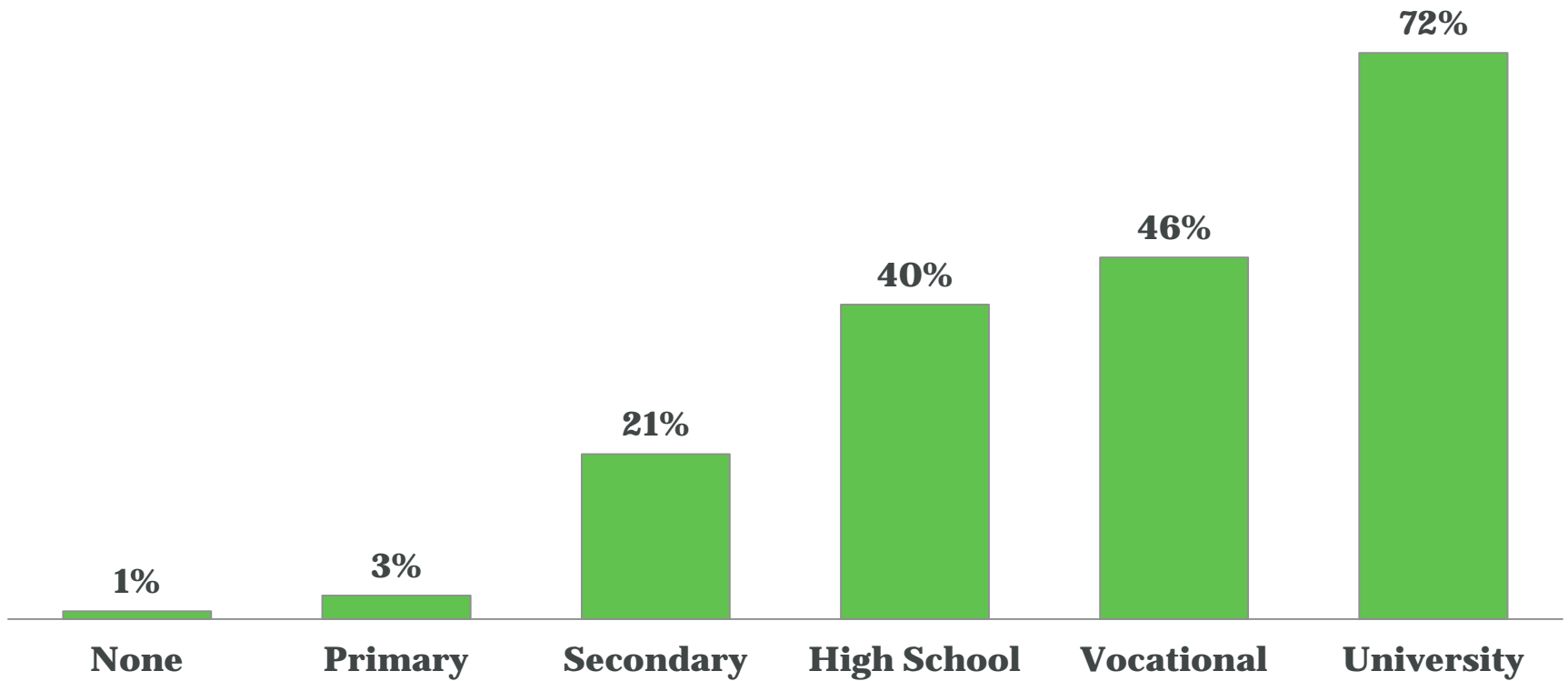
Base: All Respondents, N=3000

# Past Week Internet Use, by Urbanicity

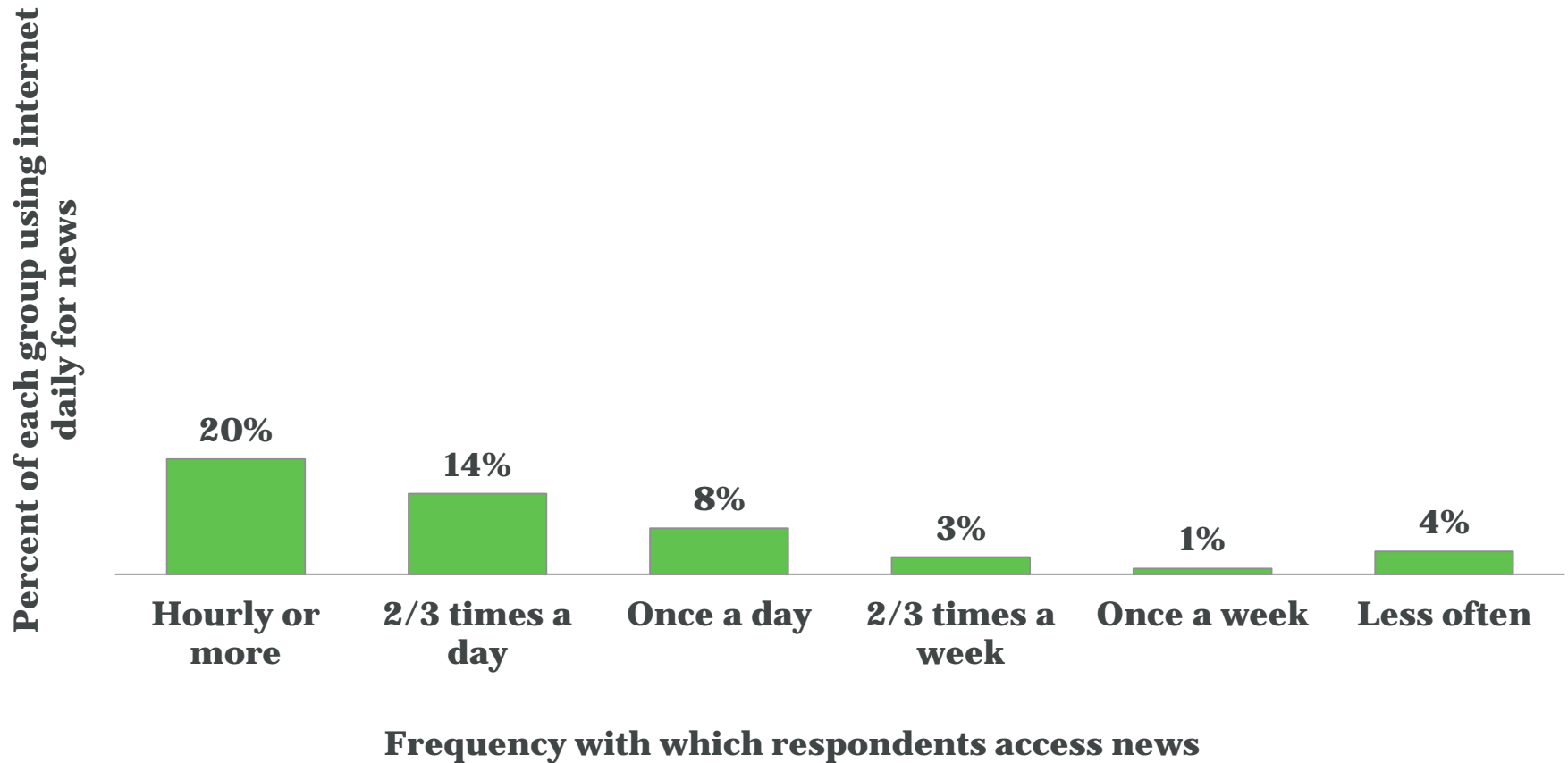
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# Past Week Internet Use, by Education

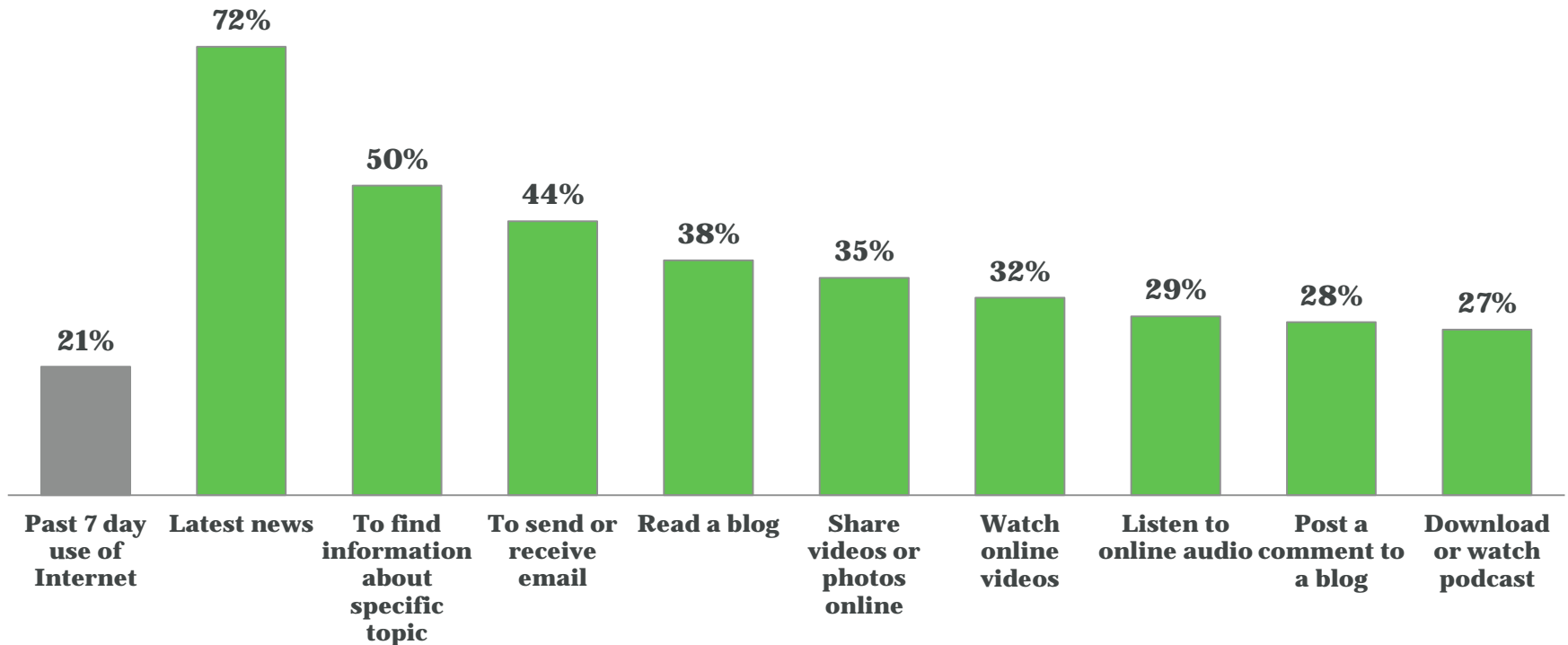


# Internet Use by Intensity of News Consumption



# Vast Majority of Regular Users of Internet Access the Latest News

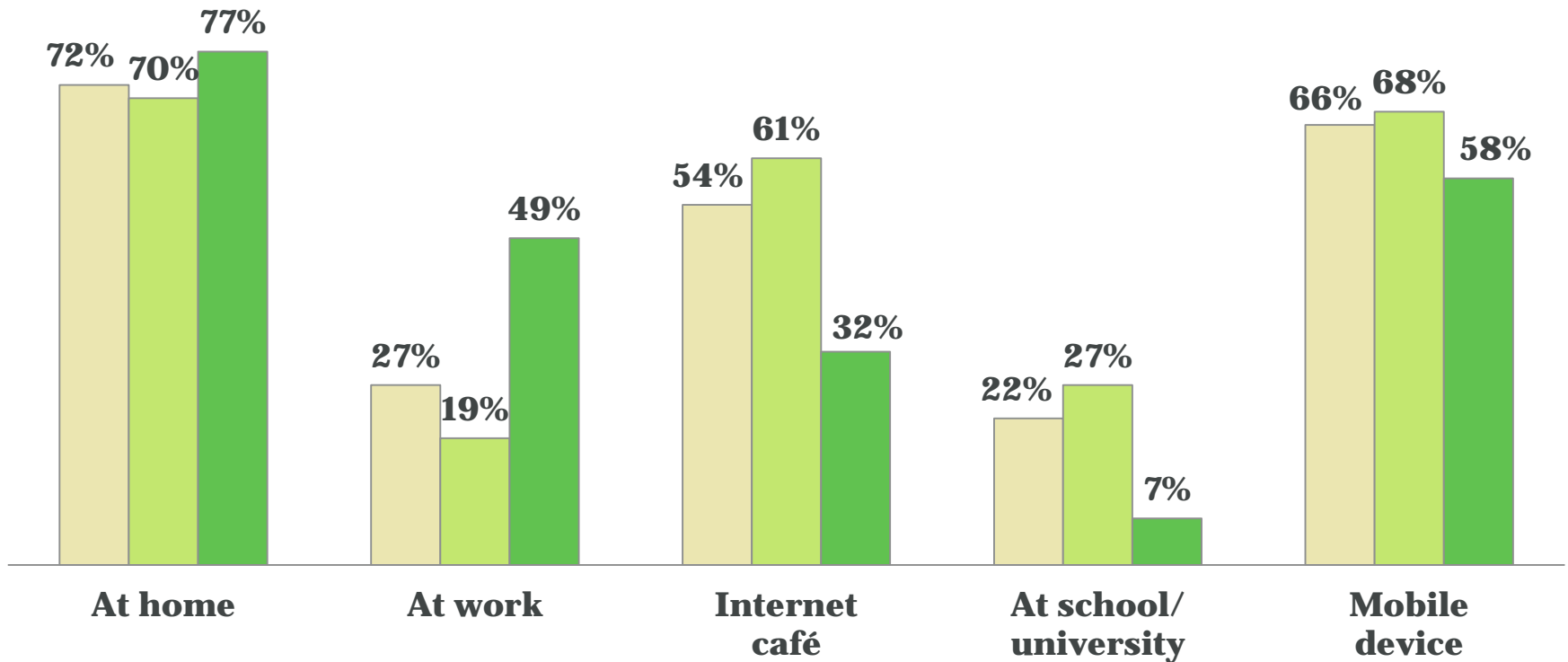
*In the last 7 days, which of the following activities have you used the Internet for*



Base: Regular user of Internet N=546

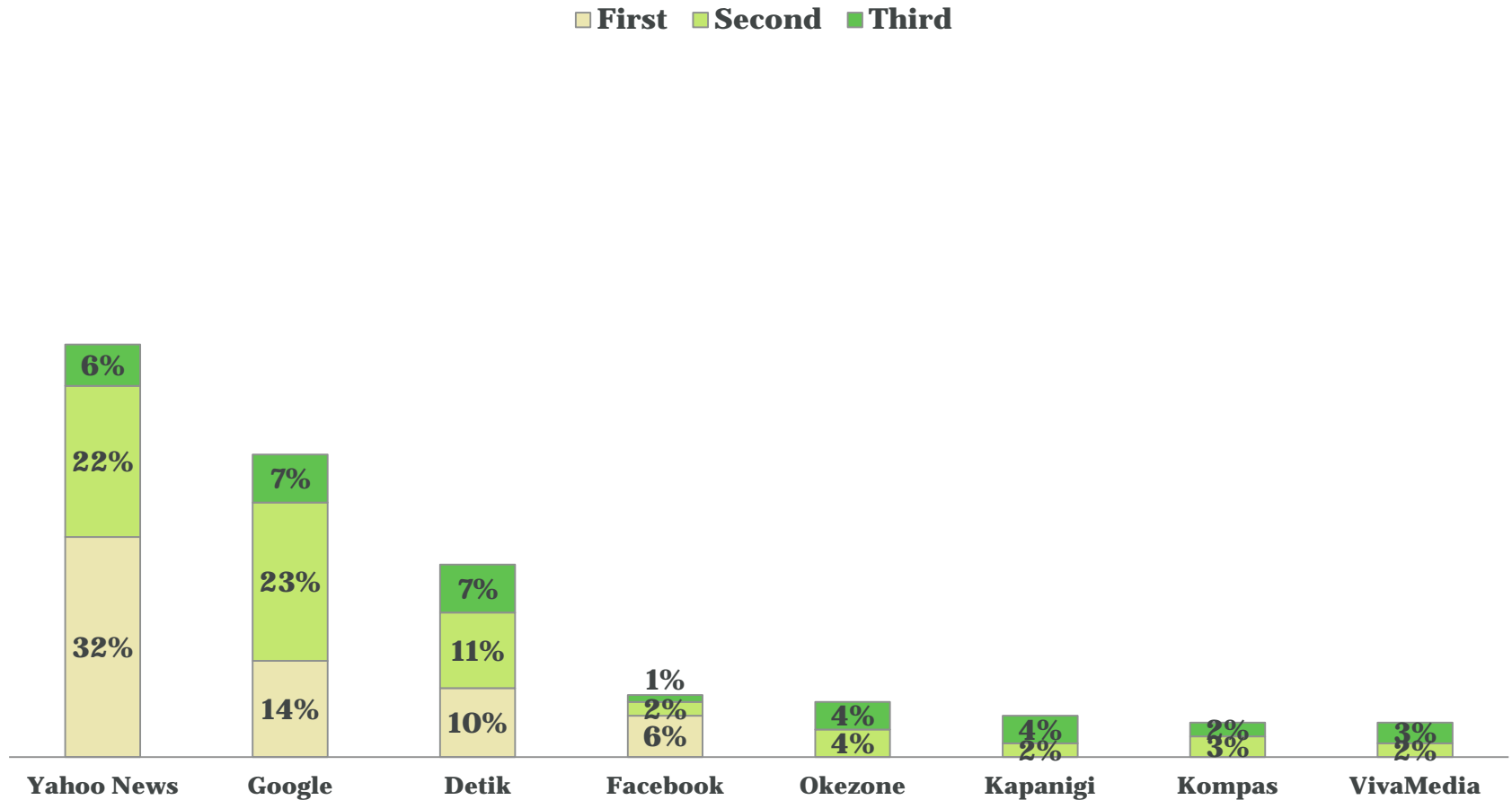
# Where Internet is Used, by Age

■ All ■ Under 30 ■ 30+



Base: Past Week Internet Users, N=618

# Where Web Users go for News

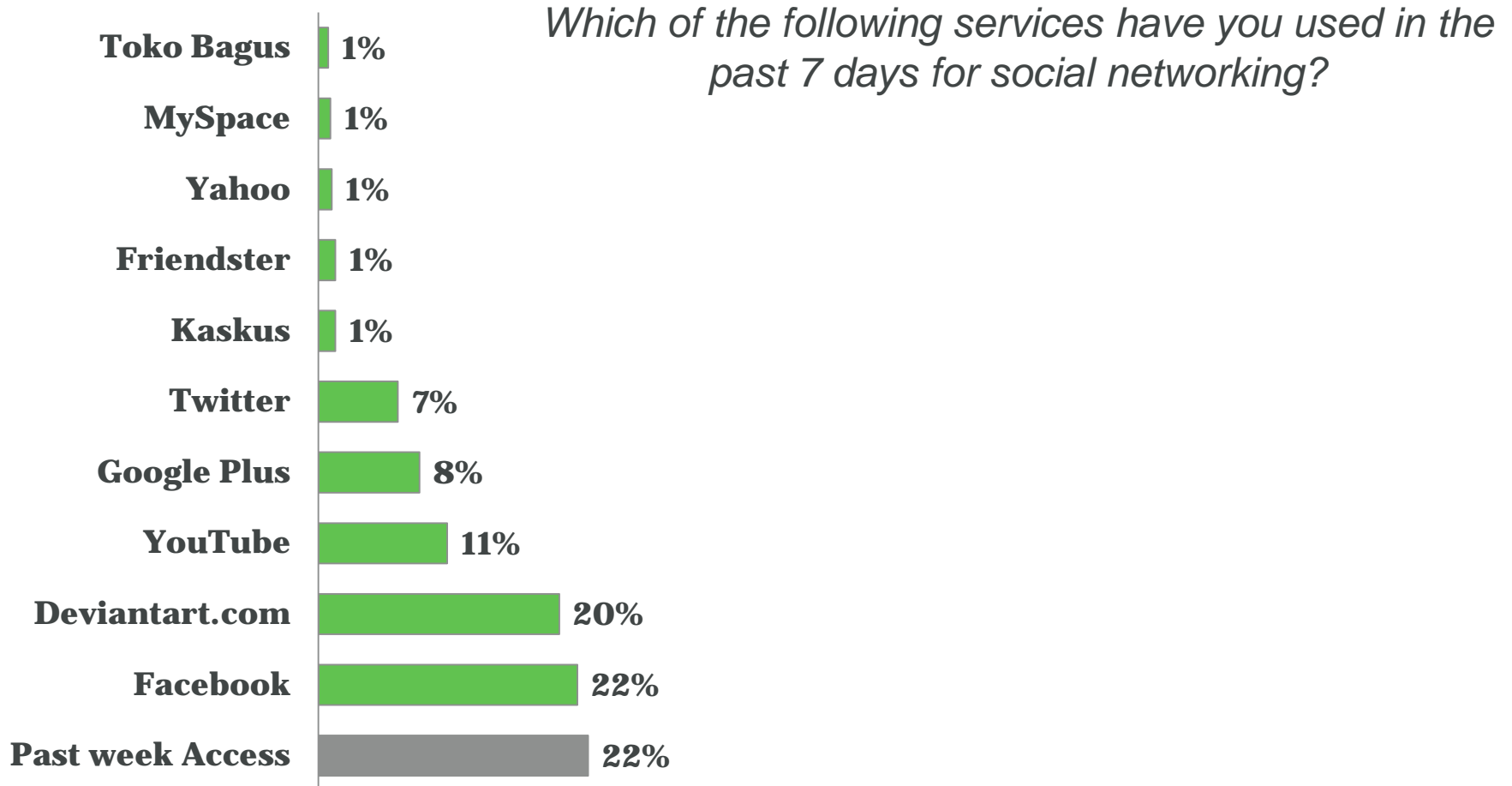


Base: Past Week Internet Users, N=618

# Social Networking and Information Sharing

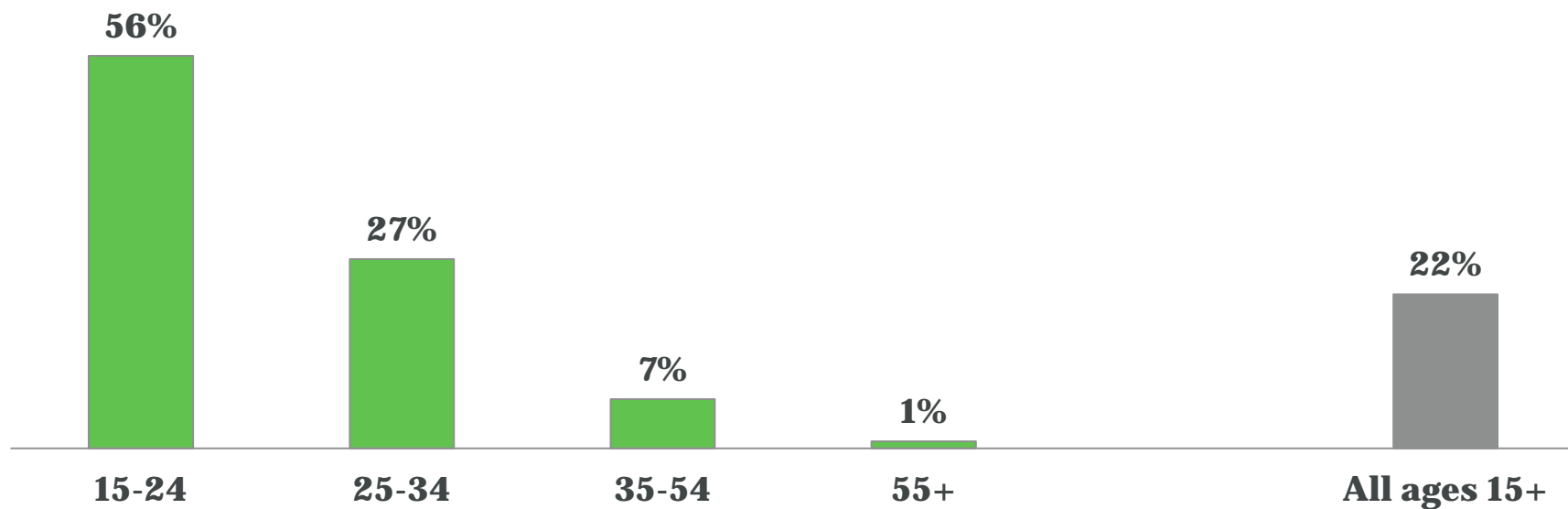


# Facebook the most accessed Social Networking Service



Base: All respondents, N=3000

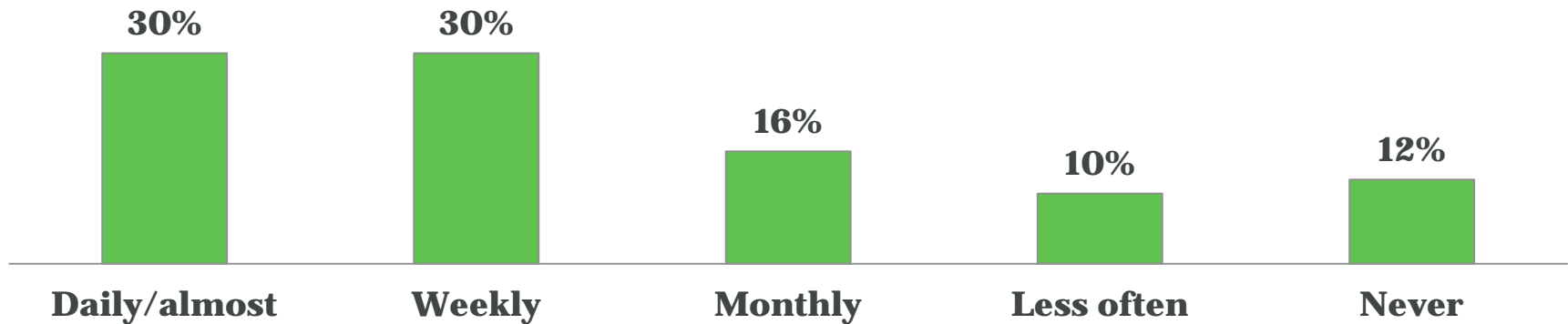
# Used Social Networking in Last Week, by Age



Base: All Respondents, N=3000

# Frequency of Information Sharing

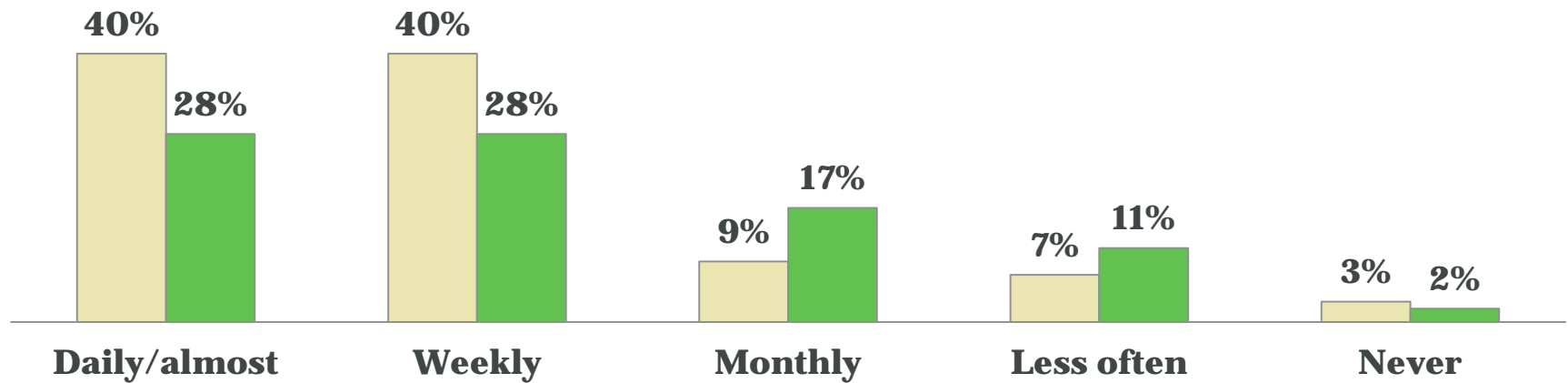
*How often do you discuss or share news with family, friends, or your social network*



Base: All Respondents, N=3000

# Frequency of Information Sharing: Internet Users vs Others

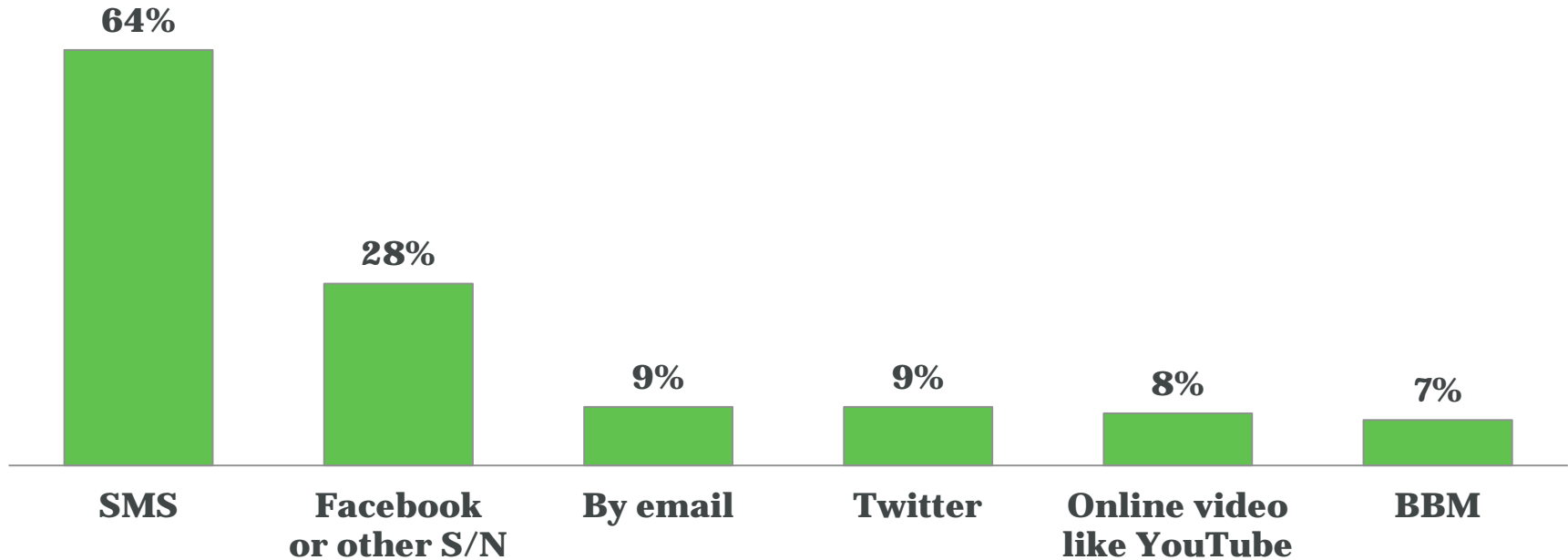
■ Internet Users ■ Others



Base: Internet Users (N=618), Others (N=2,382)

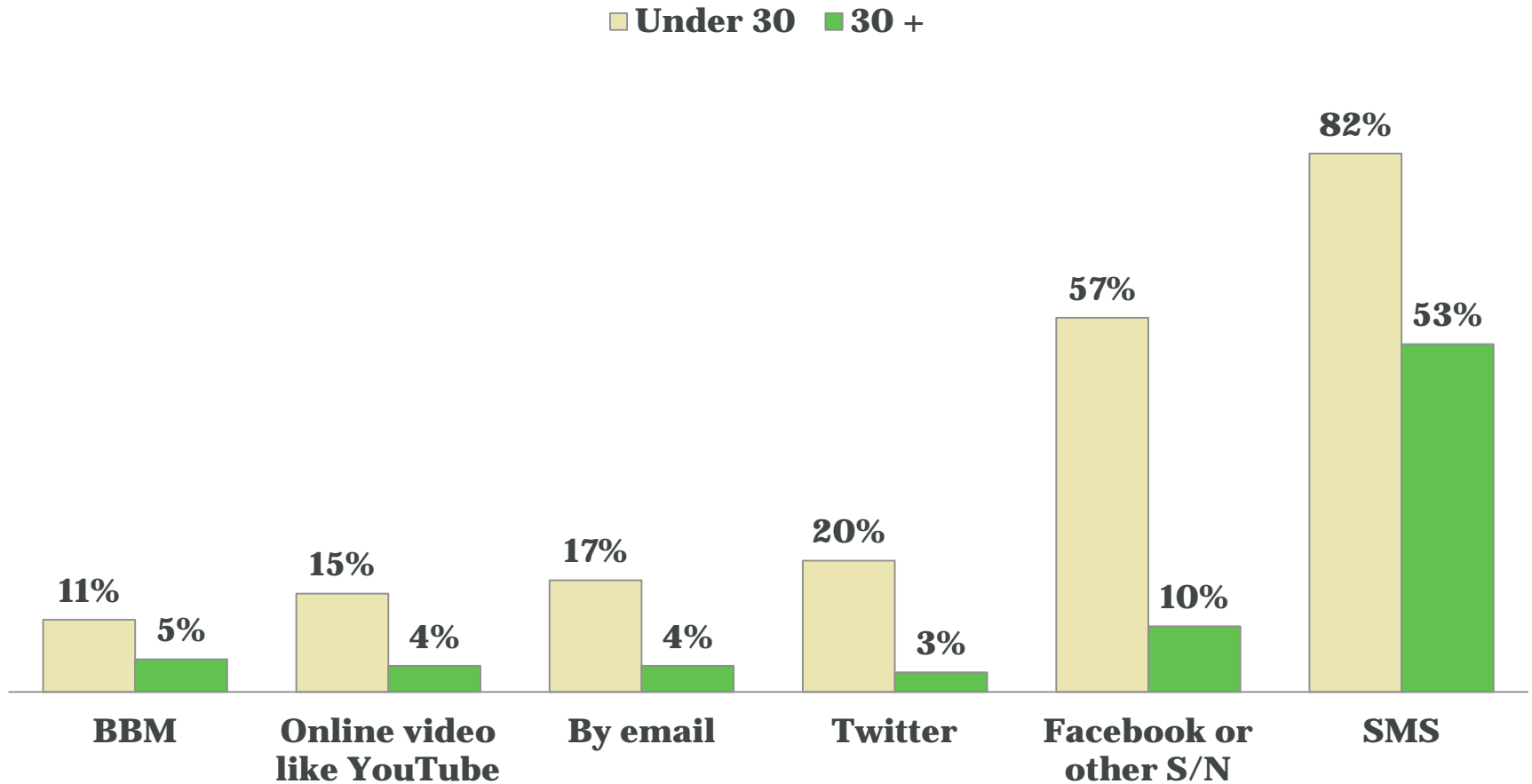
# Means of Information Sharing

*Do you share news with your friends, family, or social networks in any of the following ways?*



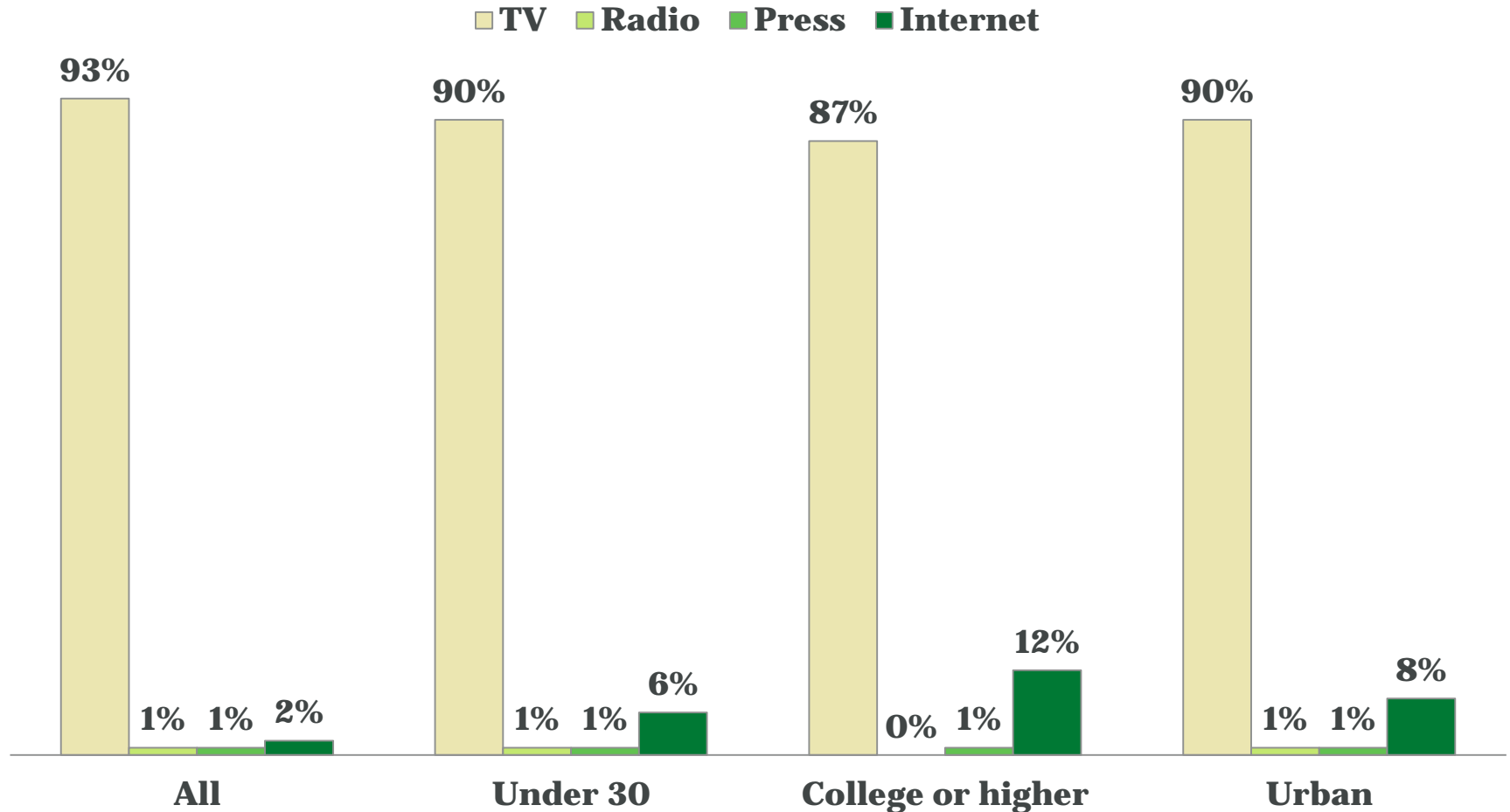
Base: Daily/Almost News Sharers, N=905

# Means of Information Sharing, by Age



Base: Under 30 (N=336), 30+ (N=569)

# Key Information Sources: Prospects for Change?



Base: All Respondents, N=3000

# Conclusions

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- Television remains the most important medium by far, both in terms of overall reach and as a news source
- Internet access – heavily driven by mobile take-up – has reached critical mass, especially among key demographics
- This phenomenon is national in nature and not just confined to more affluent urban areas
- Given the heavy reliance on mobile for Internet access; Internet content needs to work well on mobile platforms
- Any communications strategy for Indonesia has to take into account the large and growing role of social media, especially among the young
- It's only the beginning ...





## Upcoming BBG Research Series events:

- Thursday, November 8: Russia
- Thursday, December 6: To be announced.

Learn more about the BBG Research series at <http://j.mp/UjCmJb>

Have a question? Contact us at 202-203-4400 or [pubaff@bbg.gov](mailto:pubaff@bbg.gov)