

Gen X , Millennials, Gen Z report series

Indonesia Consumer On *Coffee*

2023 Jakpat survey report



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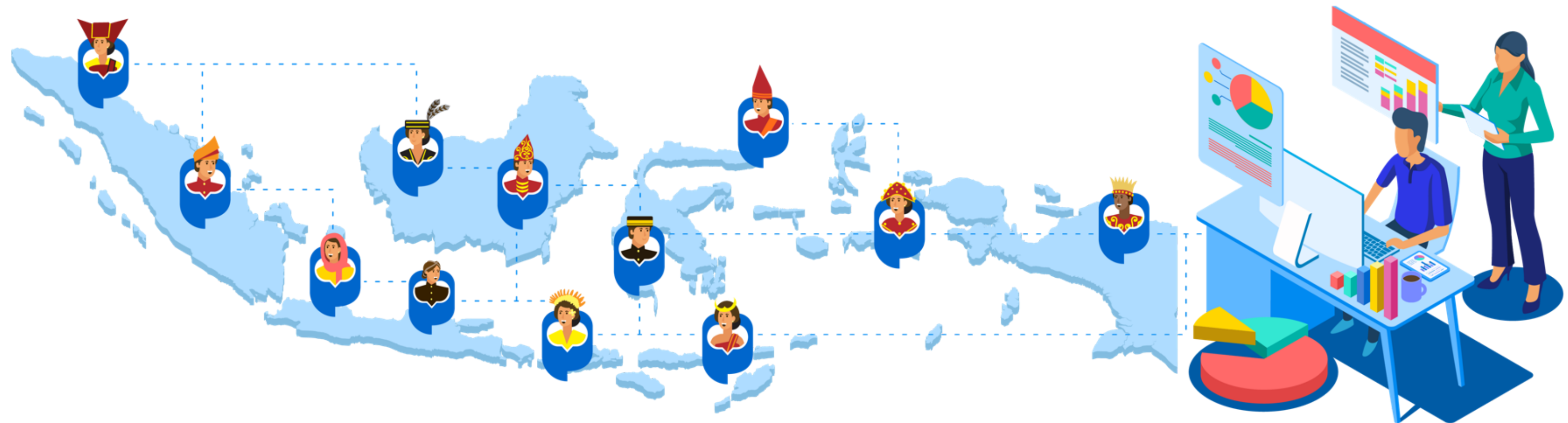


Table of *contents*

2	About Jakpat
3	Table of contents
4	Forewords and Research Method
5	Demographic profile
6	Frequency & Timing of Coffee Drinking
12	Coffee Consumption Based on Type
15	Budget & Brand Usage
21	Attitude and Behavior
28	Marketing Channel





Forewords

Indonesia is one of the largest coffee producers and exporters, but domestic coffee consumption has historically been low due to a preference for tea. However recently the culture of coffee consumption has been trending amongst the younger generation.

The survey and study would like to capture the recent habit and consumption of coffee across 3 generations of consumers.

Research *Method*

- Proportional Random Sampling
- Online Survey to Jakpat Online Panels on 26th May 2023
- The margin of Error is 5%

Respondent Profile

1008
Respondents



Respondents in this survey are proportionally targeted between Gen Z, Millennials, and Gen X equally for each:

Gen Z	359	35.62%
Millennials	398	39.48%
Gen X	251	24.90%

Gen x Spending	Gen Z	Millennials	Gen X
< 3jt	77.14%	46.24%	31.87%
3-5jt	14.57%	27.02%	21.51%
> 5jt	8.29%	26.74%	46.61%

GEN X , MILLENNIALS, GEN Z

Frequency & Timing of *Coffee* Drinking

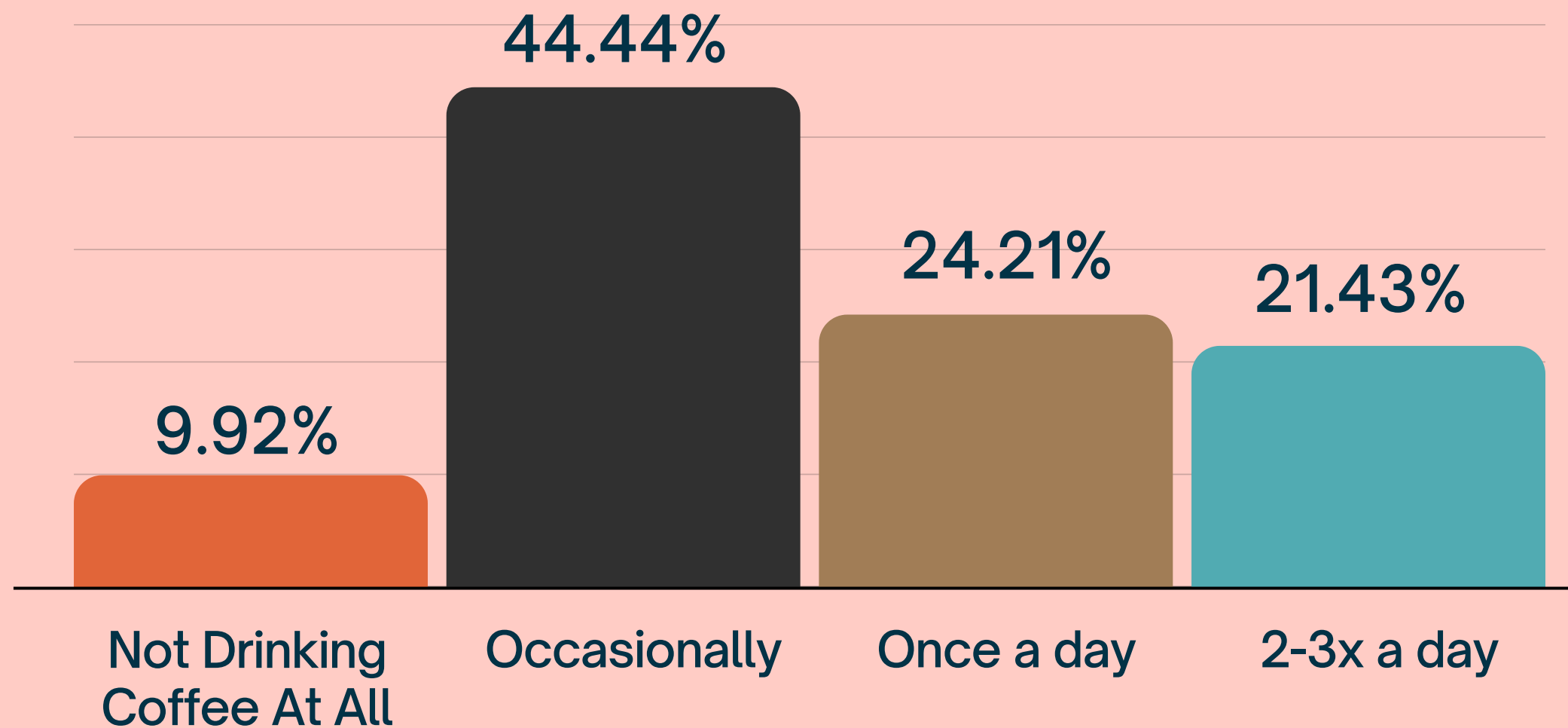




45%

Respondents are
generally drink
coffee everyday

n=1008

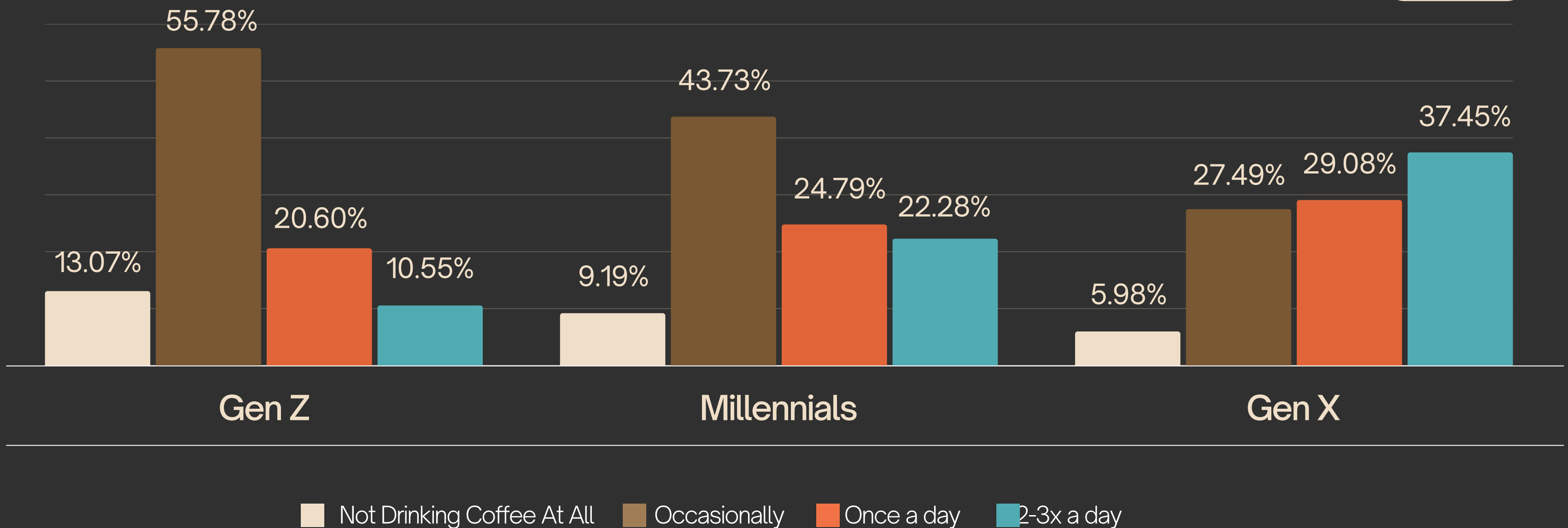


While 44% drink occasionally and
9% not drinking coffee at all

Let's look more detail on each generation habit

coffee drinking!

n=1008



The older Gen tends to drink coffee every day while the younger Gen tends to drink coffee more casually.



66%

Gen X tends to drinks
coffee everyday



55%

Gen Z tends to drink
coffee occasionally not
everyday

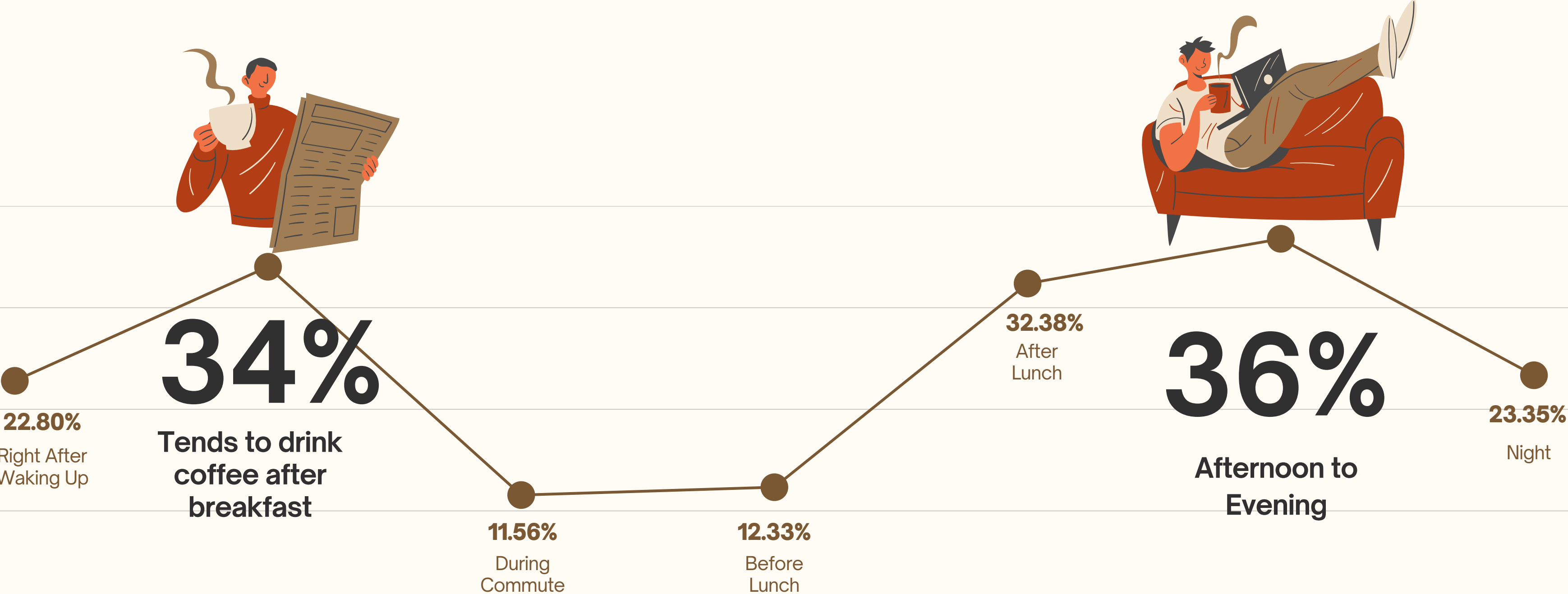


10%

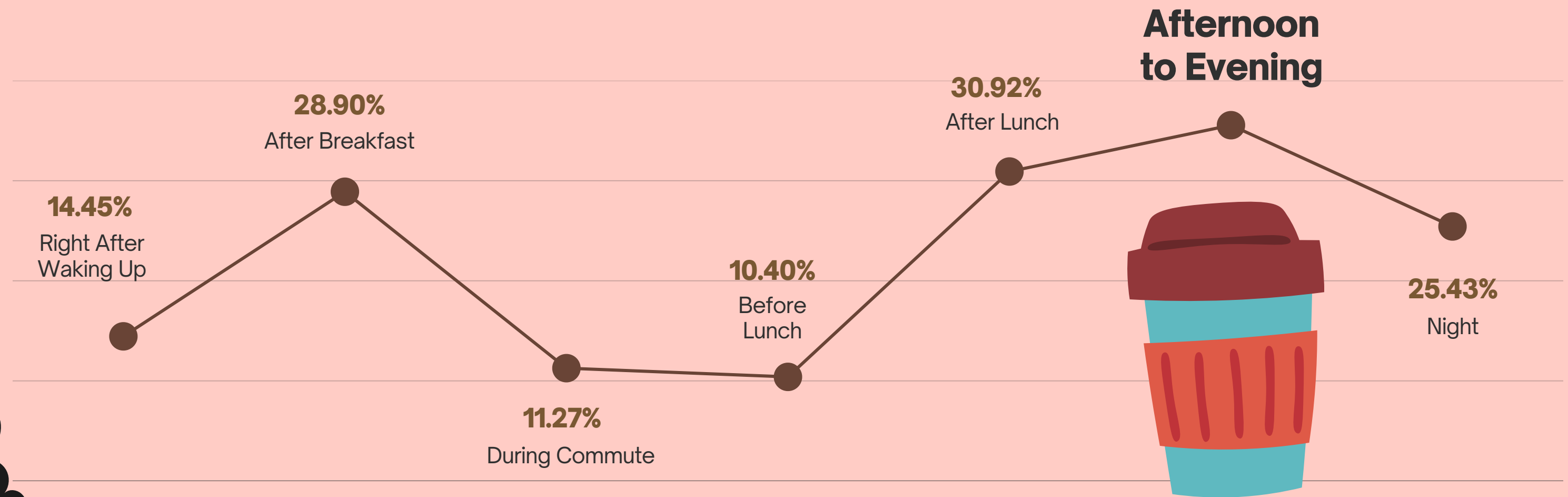
Gen Z drink coffee 2-3x a
day while 22% on Millennials
and 37% on Gen X

Generally After Breakfast, Afternoon to Evening then After lunch are more popular timing to drink coffee for all generations

n=908



n=359



35%

Gen Z drink coffee more in between afternoon and evening then after lunch (30%)

GEN X , MILLENNIALS, GEN Z

Coffee Type



n=908

Based on product type, below are general findings of **most popular product**:



58%

Instant Coffee-Mix



42%

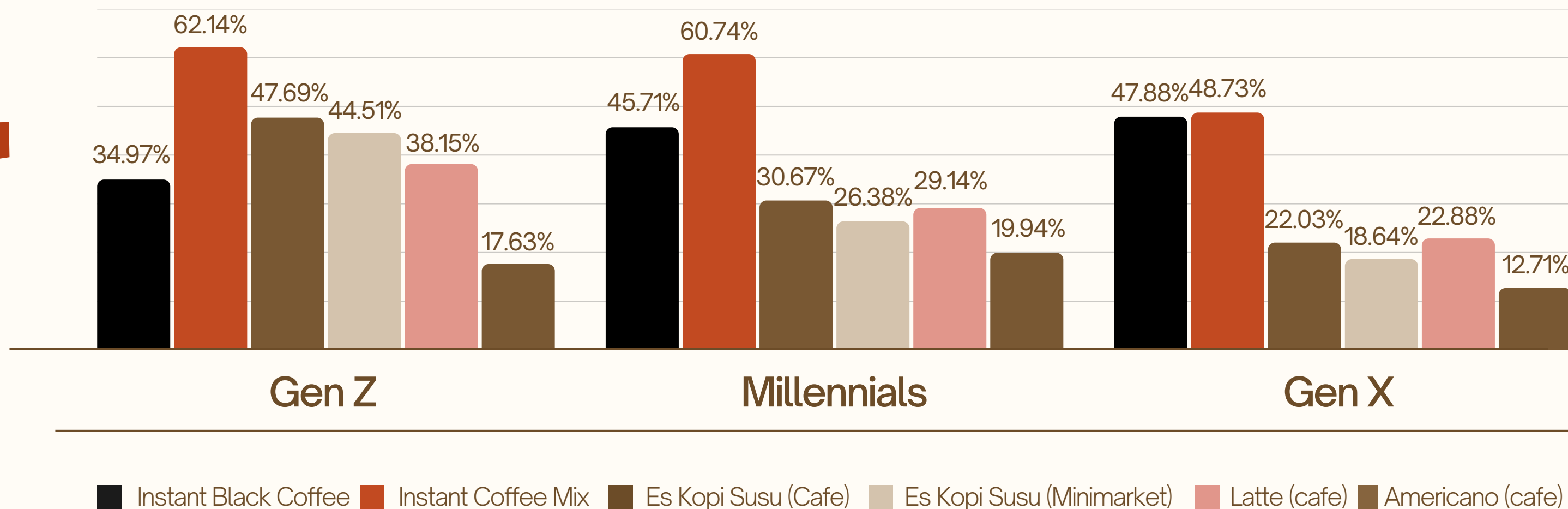
Instant Black Coffee



34%

Es Kopi Susu
(Iced Coffee Milk) from Cafe

n=908



47%

Gen Z tends to consume more **Es Kopi Susu** both from cafes (47%) and minimarket (44%). **The older Gen** tends to like **black coffee** more (Gen X 47%, Millennials 45%).

GEN X , MILLENNIALS, GEN Z

Budget & Brand *Usage*





13K

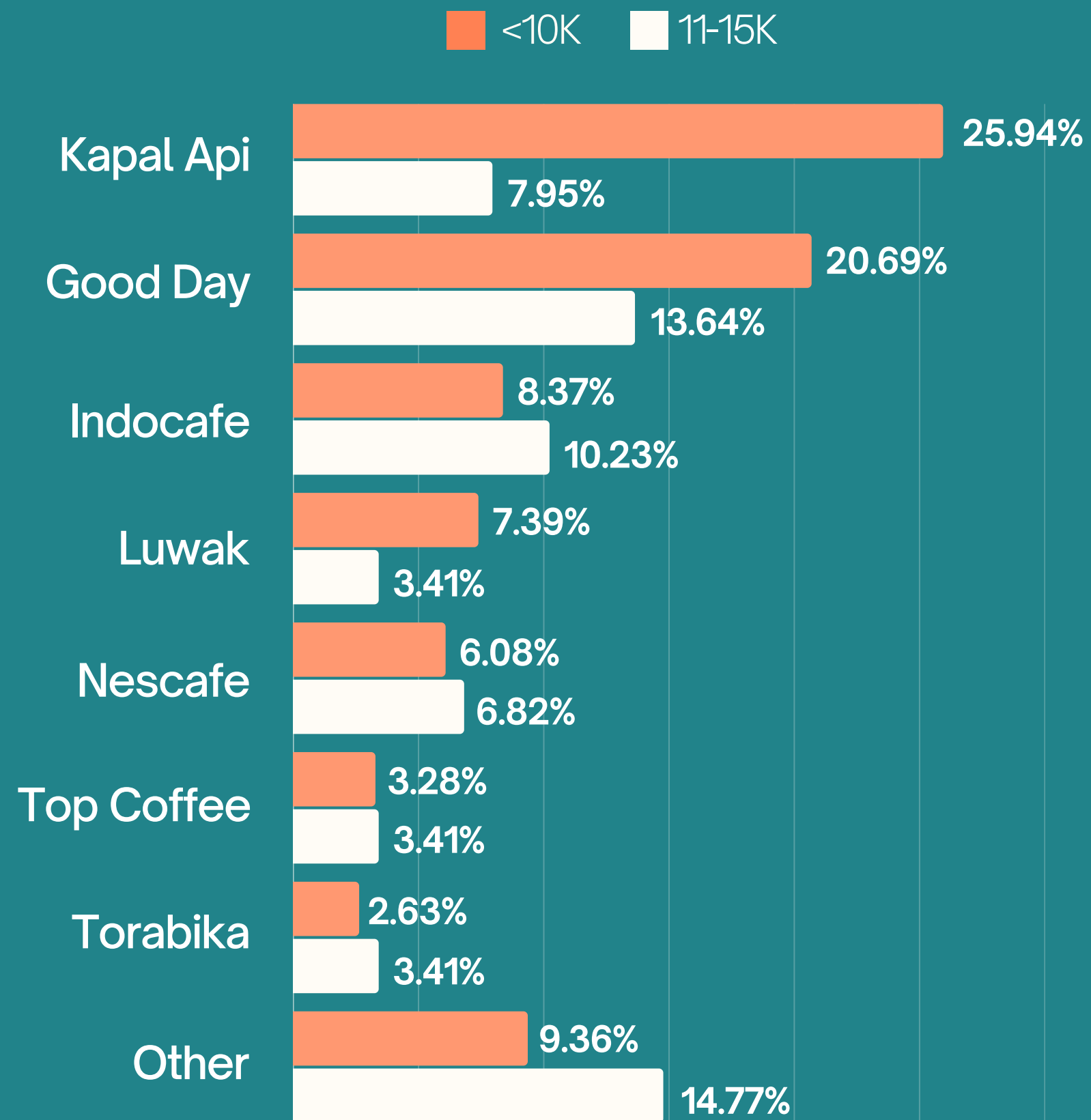
Average budget to buy one
coffee across generation

n=908

Gen Z spends a bit more on average compared to Millennials (+4%) and Gen X(+27%) segment on coffee. Below table is in Indonesian Rupiah:

Gen Z	Millennials	Gen X
14,146	13,543	11,113

*Open-ended question asking the
respondent to mention budget numbers*

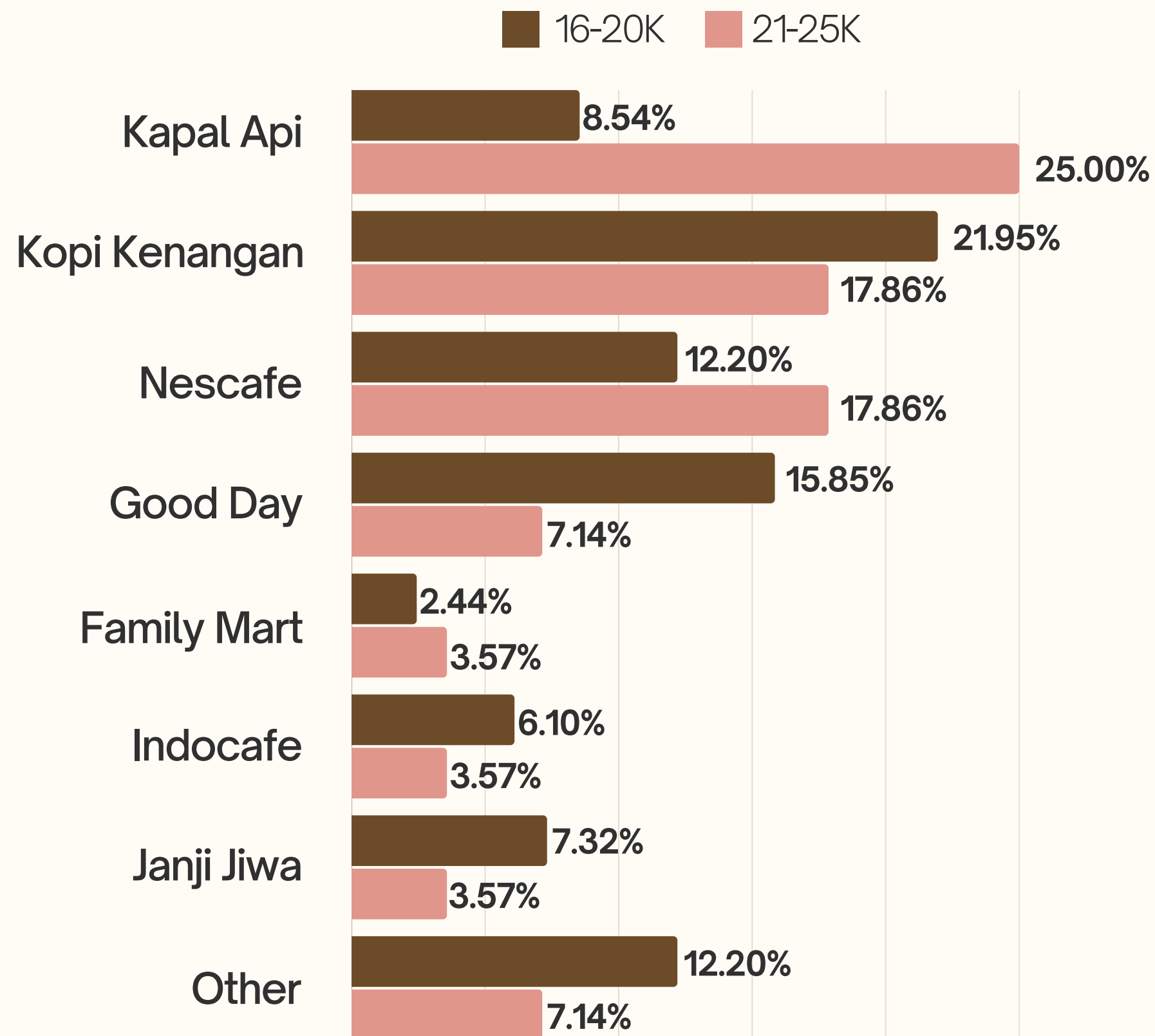


Open-ended question asking respondents to mention the brand



n=697

Kapal Api is a top choice in the below 10k budget segment Followed by Good Day. Then Indocafe/Coffee mix wins at a higher budget of 11-15K also followed by Good Day.



Open-ended question asking respondents to mention the brand

n=110

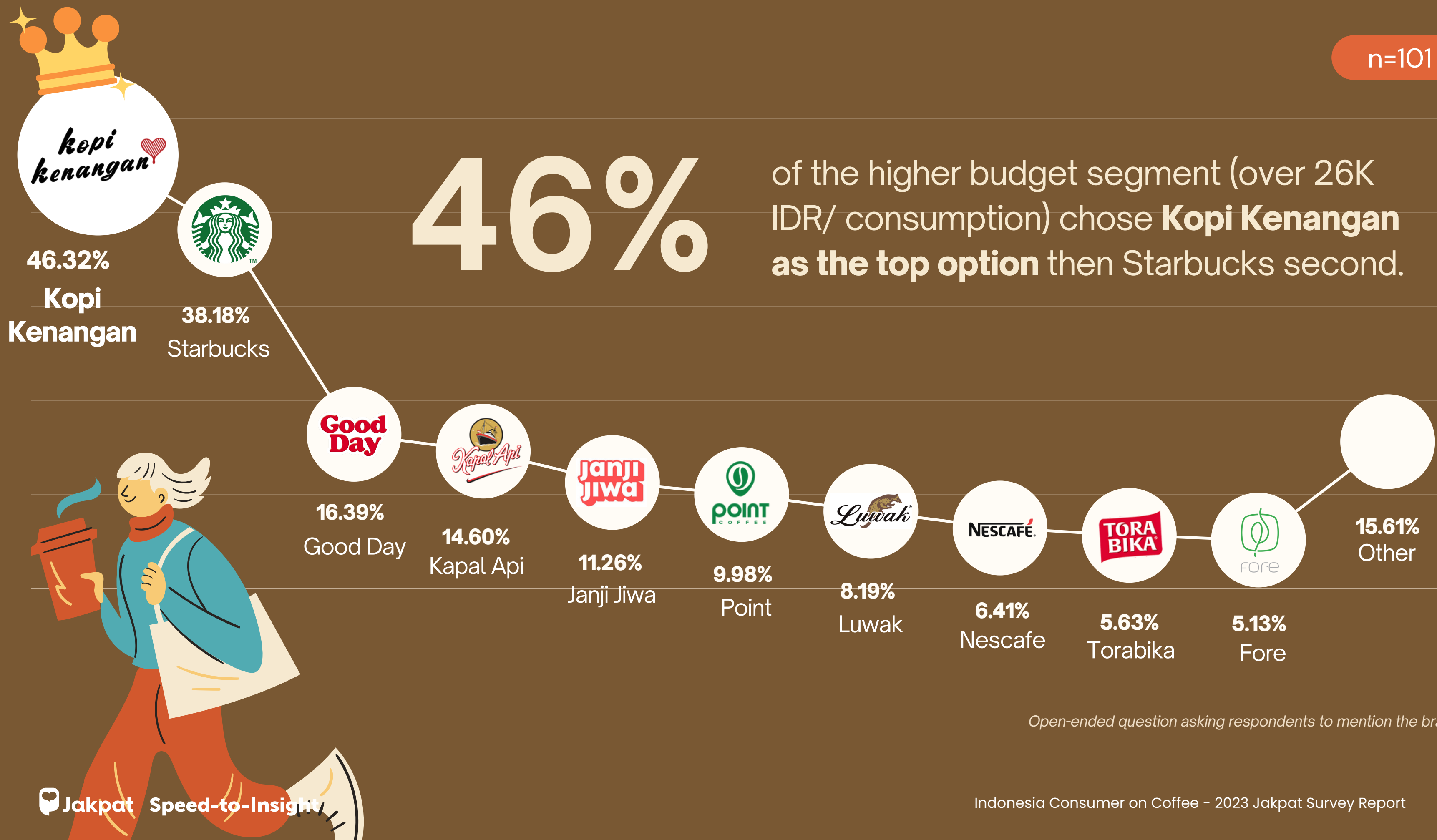


The top options for budget 16-20K are Kopi Kenangan then Good Day. While for a budget of 21-25K, the Top options are Kapal Api then between Kopi Kenangan and Nescafe.

n=101

46%

of the higher budget segment (over 26K IDR/ consumption) chose **Kopi Kenangan** as the **top option** then Starbucks second.

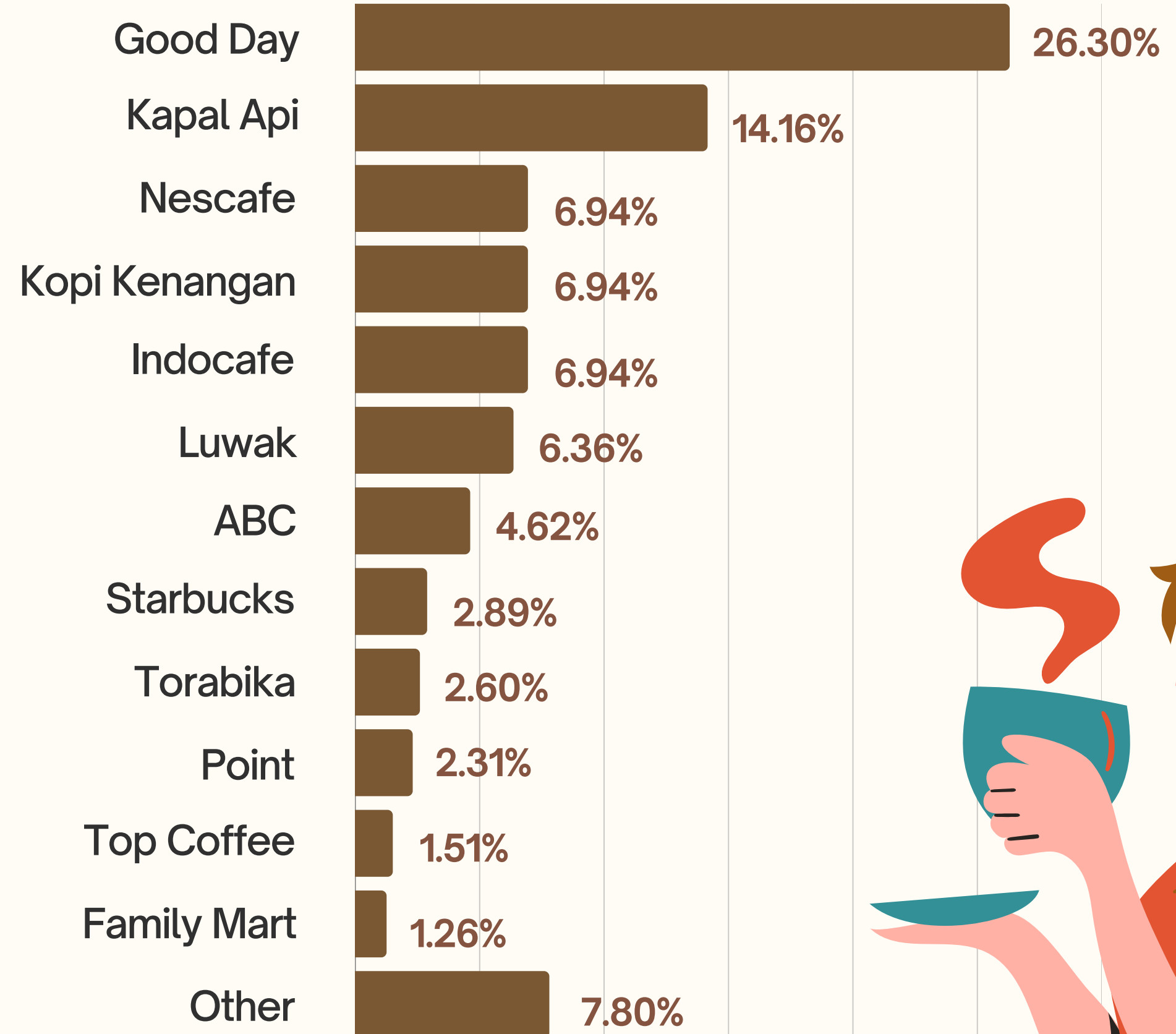


Open-ended question asking respondents to mention the brand

n=359

26%

Gen Z choose Good Day as their top coffee brand followed by Kapal Api.



GEN X , MILLENNIALS, GEN Z

Attitude & *Behavior*



n=908

27%

Gen Z always looking for promotion, and changing brands is OK which the attitude tends to be higher than other Gen. 30% of Gen X always buy the same brand, higher than other Gen



28%

Always drink the same brand across gen.



23%

Always try to find promotion, changing brands are fine across gen.

n=908



45%

Drink to Socialize



37%

Coffee to Set Focus



20%

Always drink coffee
with milk

Why Do You Choose That *Coffee Brand* ?

(Open Ended Question)

Taste & Aroma

Manisnya or Pahitnya Pas are most mentioned. But if we look deeper there are two types of taste mentioned either Soft or Strong. Respondent also expressed that Aroma is important.



“ Karena rasa kopinya tidak terlalu dominan”



“Tidak terlalu manis, pahit yang tidak terlalu pahit”



“Aroma wangi, rasa kopi yang enak”



“Kopinya strong untuk ukuran kopi sachet”

Why Do You Choose That *Coffee Brand* ?

(Open Ended Question)

Soft for Stomach

Another interesting keyword is related to the stomach effect of drinking coffee. A segment of respondents chooses the brand because the coffee has no side effects on their stomachs.



“Karena asam lambung jadi tidak semua brand kopi cocok di lambung yang cocok brand tersebut”



“Rasa kopinya tidak terlalu kuat, nyaman ke lambung”



“Enak tidak perih dilambung”



“Light caffein, tidak bikin kembung”

Why Do You Choose That *Coffee Brand* ?

(Open Ended Question)

Well-Known Brand



After taste convenience and simplicity in preparation are apparently important too

No Coffee Grounds Left



Interestingly some respondents are choosing the brand because it's famous already.



“Karena sudah terkenal dan rasanya sesuai”



“Ternama dan sudah merek lama”

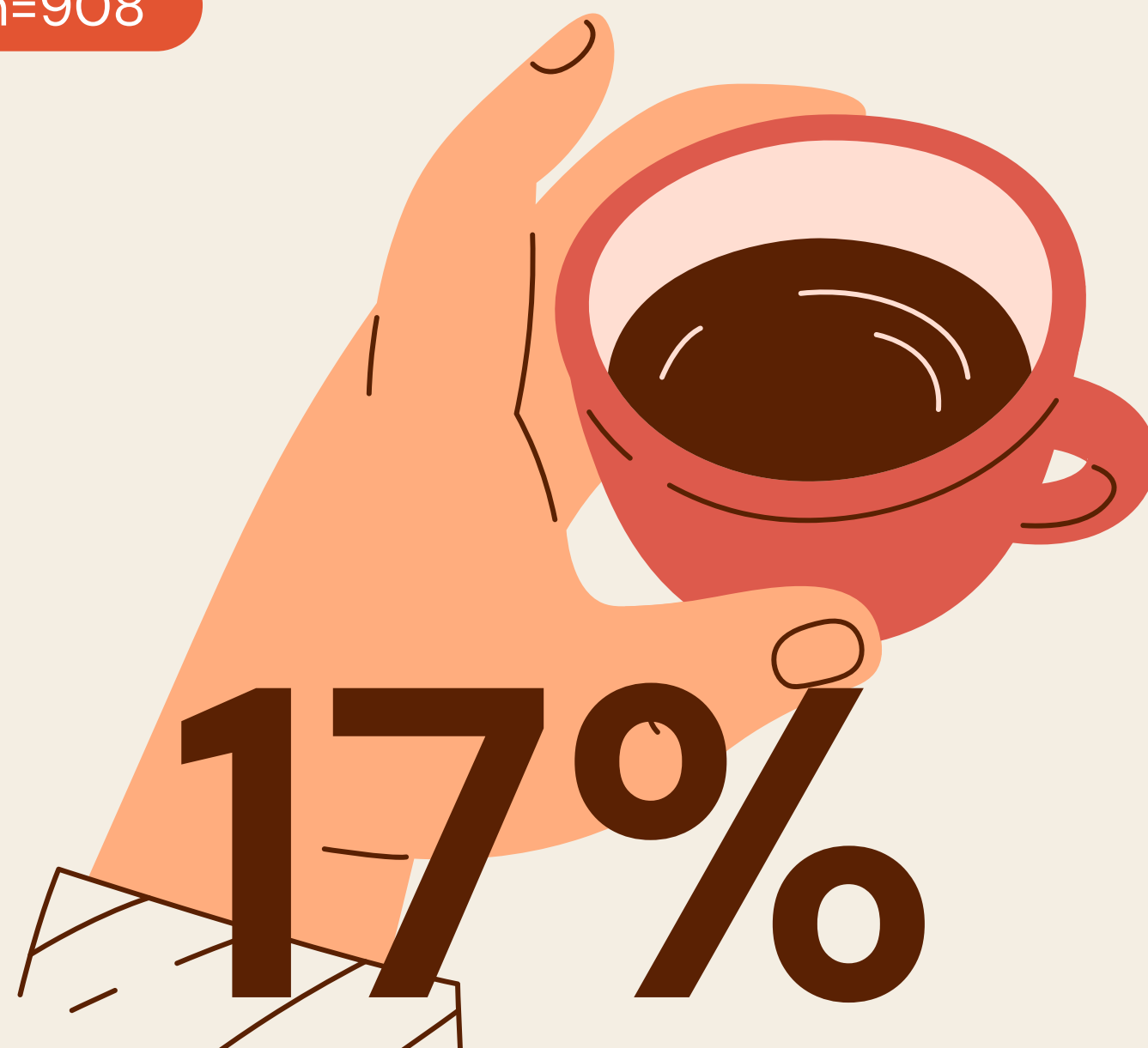


“Bisa larut dengan air dingin, tanpa ampas”

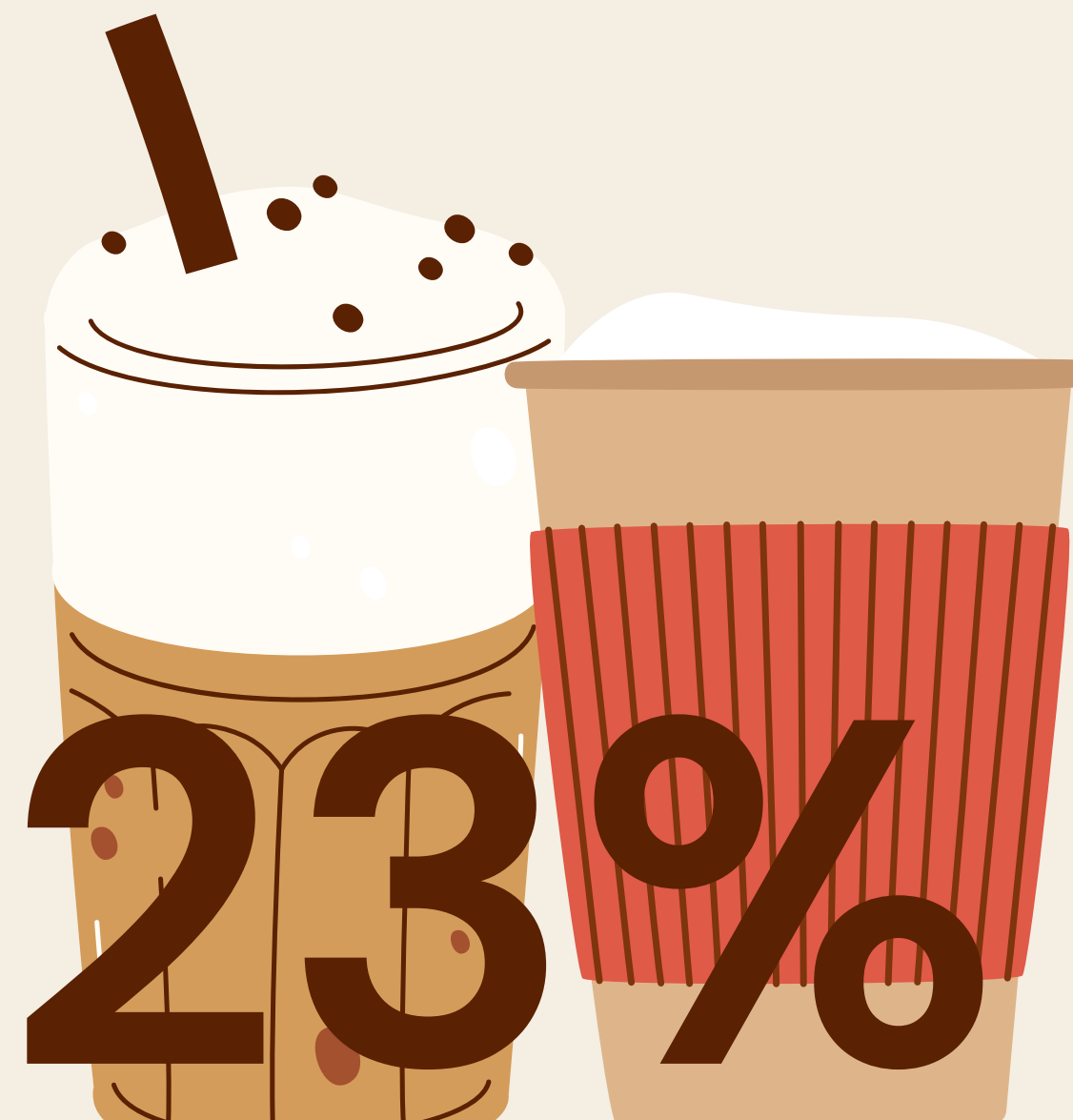


“Simple krn gaada ampasnya”

n=908



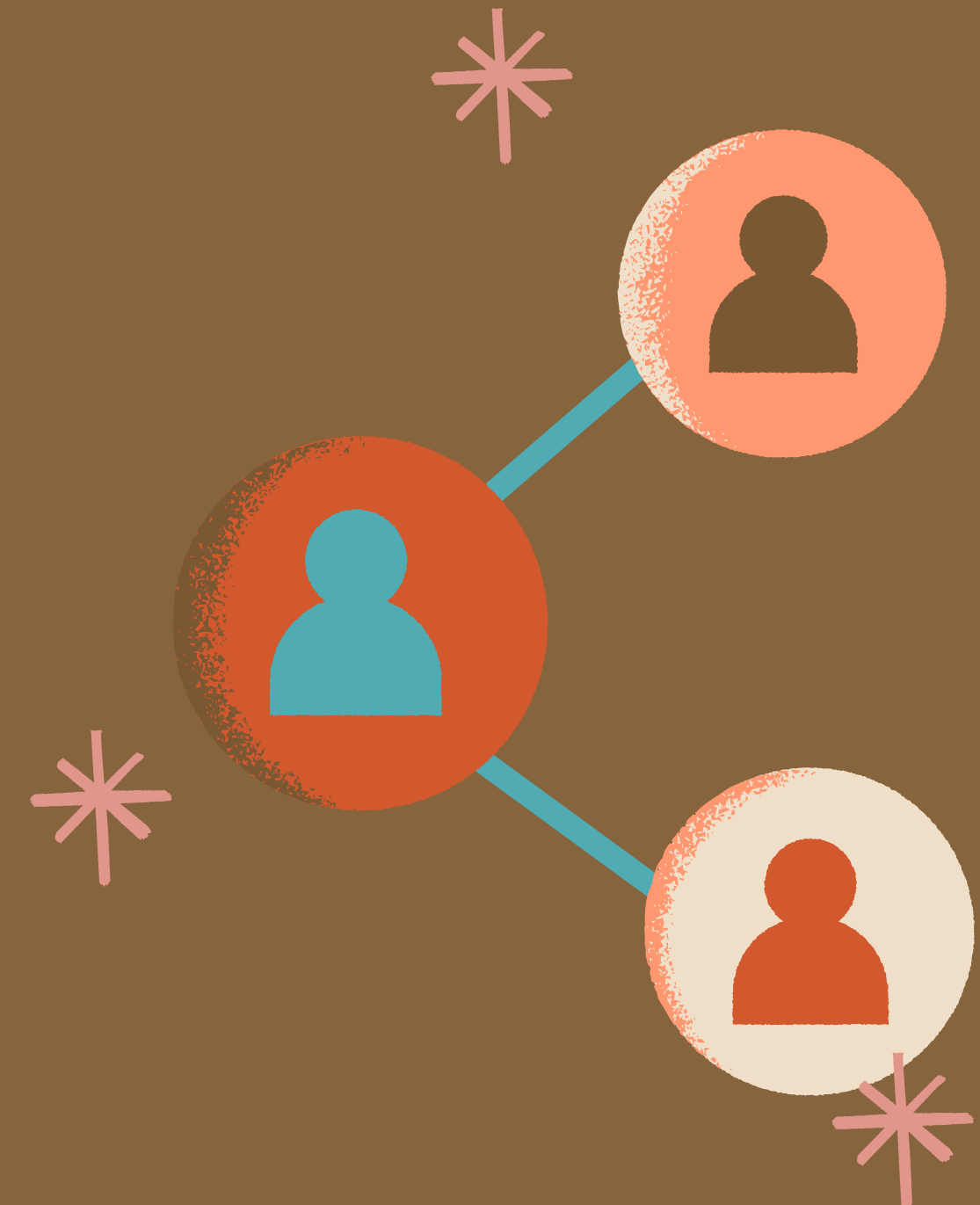
Older Gen tend to like more black coffee type and coffee exploration (17% on Gen X, Millennials)



Kopi Susu is more popular with Millennials and Gen Z (22-23%) than Gen X (11%) Sweet coffee is more popular with Gen Z, while Less sugar/No sugar is more to older Gen

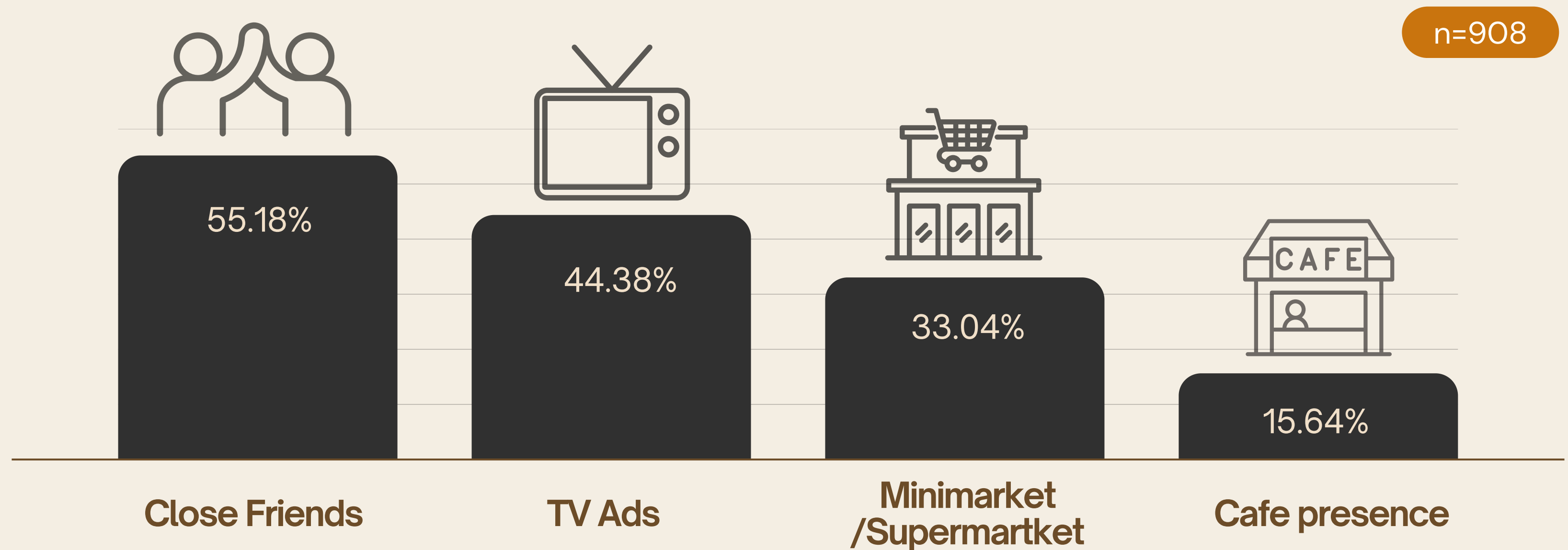
GEN X , MILLENNIALS, GEN Z

Marketing *Channel*



Source of *Awareness* (Conventional)

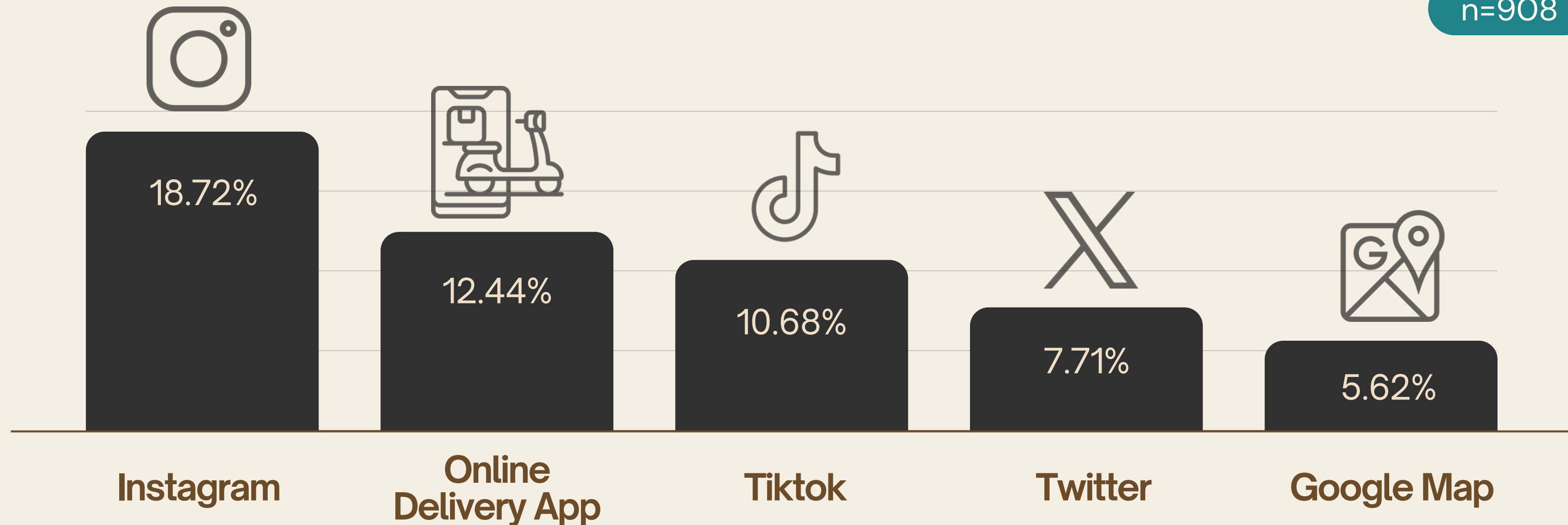
Generally close friends and relatives are no.1 source of awareness (55%) similar across Gen, Followed by TV Ads (44%), then Mart (33%)



Source of Awareness (Online/New)

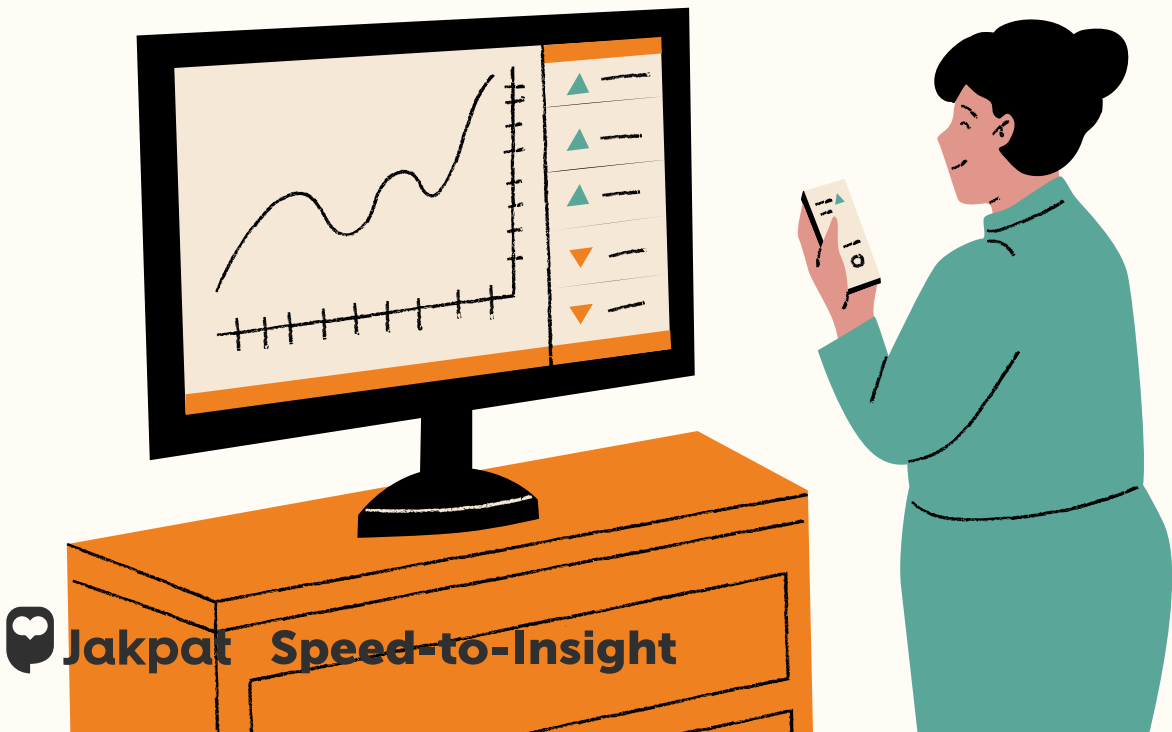
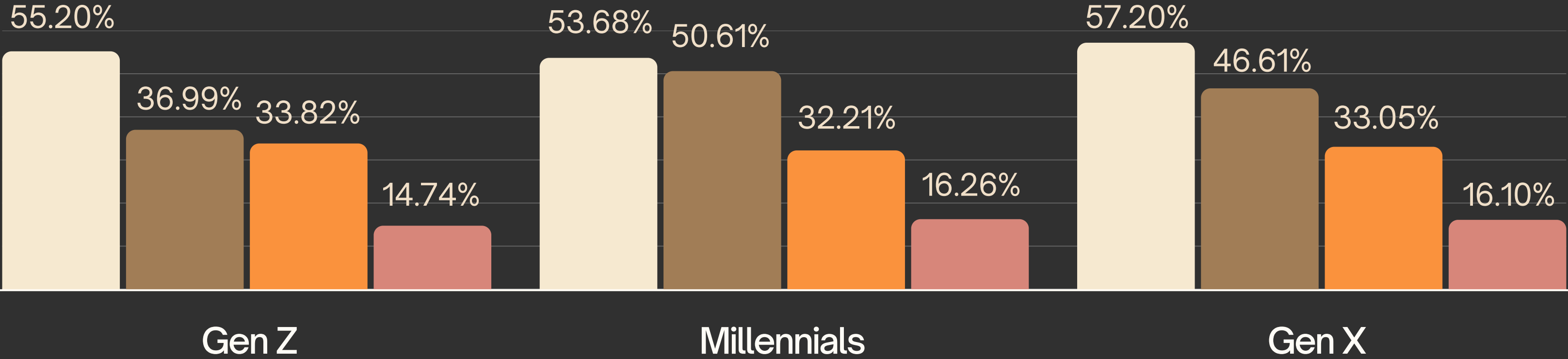
Generally for online media
1. Instagram 18%, 2. Online
Delivery App, 3. Tiktok

n=908



n=908

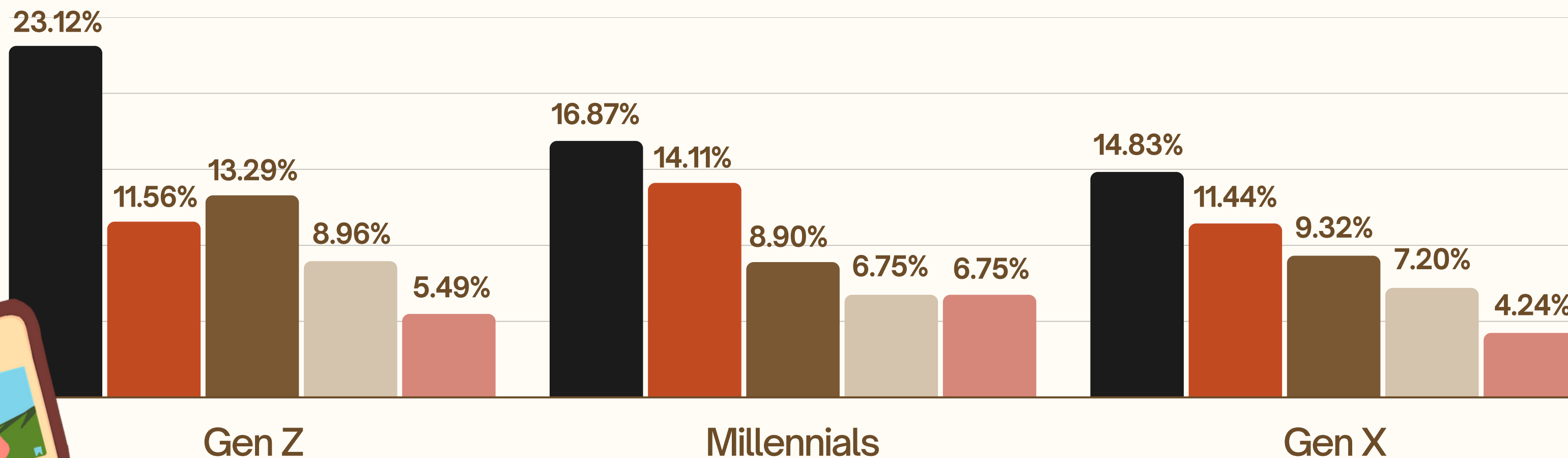
Close Friends/Circle TV Ads Minimarket/Supermarket Cafe Presence



TV Ads are more popular to Millennials 50% and Gen X 46% , less popular to Gen Z. 15% are knowing the brand by passing the cafe on the street

n=908

Instagram Aplikasi Online Delivery Tiktok Twitter Google Map



Instagram 23% and TikTok 13% are more popular channels for Gen Z. Online delivery apps and Google Maps are more popular among Millennials while Gen X is more to conventional channel like TV.

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