

CONSUMER INSIGHTS:

Local Food & Beverage Market

2025 JAKPAT SURVEY REPORT



Forewords

The Ministry of Trade said that the culinary sector continues to represent the primary area of interest in franchise businesses*. As of February 2025, a total of 157 domestic franchisors and 154 foreign franchisors were recorded, with the food and beverage (F&B) sector maintaining dominance at 47,77%. In conclusion, the culinary sector remains the backbone of Indonesia's franchise industry.

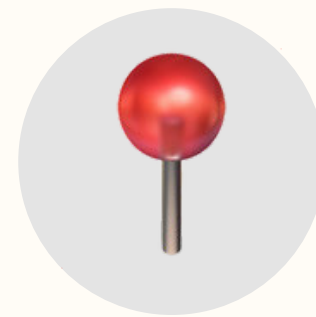
Jakpat conducted a survey to identify local F&B trends across eight urban areas in Java, recognized as key economic hubs with high population density, in order to provide actionable insights for business owners evaluating potential expansion opportunities.

*<https://www.antaranews.com/berita/4774885/kemendag-sebut-sektor-kuliner-masih-mendominasi-bisnis-waralaba>

Research *highlights*



Women are more likely to eat out in the evening, while men show slightly higher activity in the late-night and morning slots.



Upper SES diners show a stronger tendency to choose regional restaurants and formal restaurants compared to other groups.



Noodles and soups are the most popular local meals, followed by chicken dishes like *geprek*.



Kopi Kenangan and Teh Poci are local beverage brands favored by a significant number of respondents.



Value packages and “Buy 1 Get 1” deals are the most popular promos at newly opened eateries.

Table of contents



- 2** Forewords
- 3** Research highlights
- 4** Table of contents
- 5** Research details
- 6** Demographic profile
- 7** Strong preference for local F&B options
- 8** 3 out of 5 choose a dining place for its affordability and flavor
- 9** Reality differs from expectations when dining out
- 10** More than half prefer cashless payments
- 11** 41% of respondents usually dine out for dinner
- 12** 3 out of 4 go to the local food stall
- 13** Noodles & soups are the most favorite local heavy meals
- 14** 45% of women enjoy eating local ice cream
- 15** The average price of main dishes is under IDR 25K
- 16** Nearly half favor Kebab Turki Baba Rafi
- 17** Pancakes typically cost about IDR 36K on average
- 18** Most people are enthusiastic about exploring new dining spots
- 19** 1 out of 3 people notice a new restaurant just by passing it
- 20** Value package is the most popular food promo
- 21** One-third visit new restaurants a while after opening

Research *details*

Data collection

 The survey was distributed to a total of **995 respondents in 8 urban areas in Java**

 The data were collected from **2nd to 7th of September 2025**

 Margin of error **below 5%**

 The questionnaires were distributed via **Jakpat mobile app**

 Proportioned by the **Indonesian internet population**

Research objective

 To analyze consumer behavior toward **local F&B products**

 **To identify** leading categories and **the preferred local F&B brands**

Demographic *profile*

n= 1155 respondents

Gender

55%

Male

45%

Female

Socio Economic Status

19%

Upper

65%

Middle

16%

Lower

Age group

15-19

36%

20-25

64%

Occupation

Worker*

52%

Student

37%

No job

7%

Homemaker

4%

**employee, freelancer, entrepreneur, educator, etc*

Parental status

87%

No Kids

13%

With kids

Area

Bogor

14%

Depok

10%

Bandung

26%

Yogyakarta

10%

Surakarta

6%

Semarang

12%

Malang

8%

Surabaya

15%

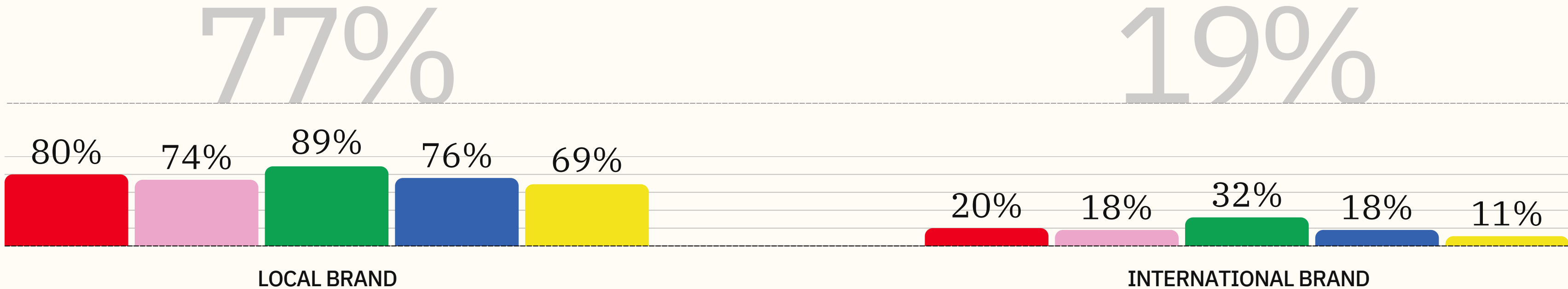
Strong preference for *local F&B options*

n= 995 respondents

Eating out habits reveal that local brands dominate across all segments. This tendency is especially strong among upper SES groups, where nearly 9 out of 10 choose local options.

Preference of eating out

● Male ● Female ● Upper SES ● Middle SES ● Lower SES



4 out of 5 males
choose local F&B brands

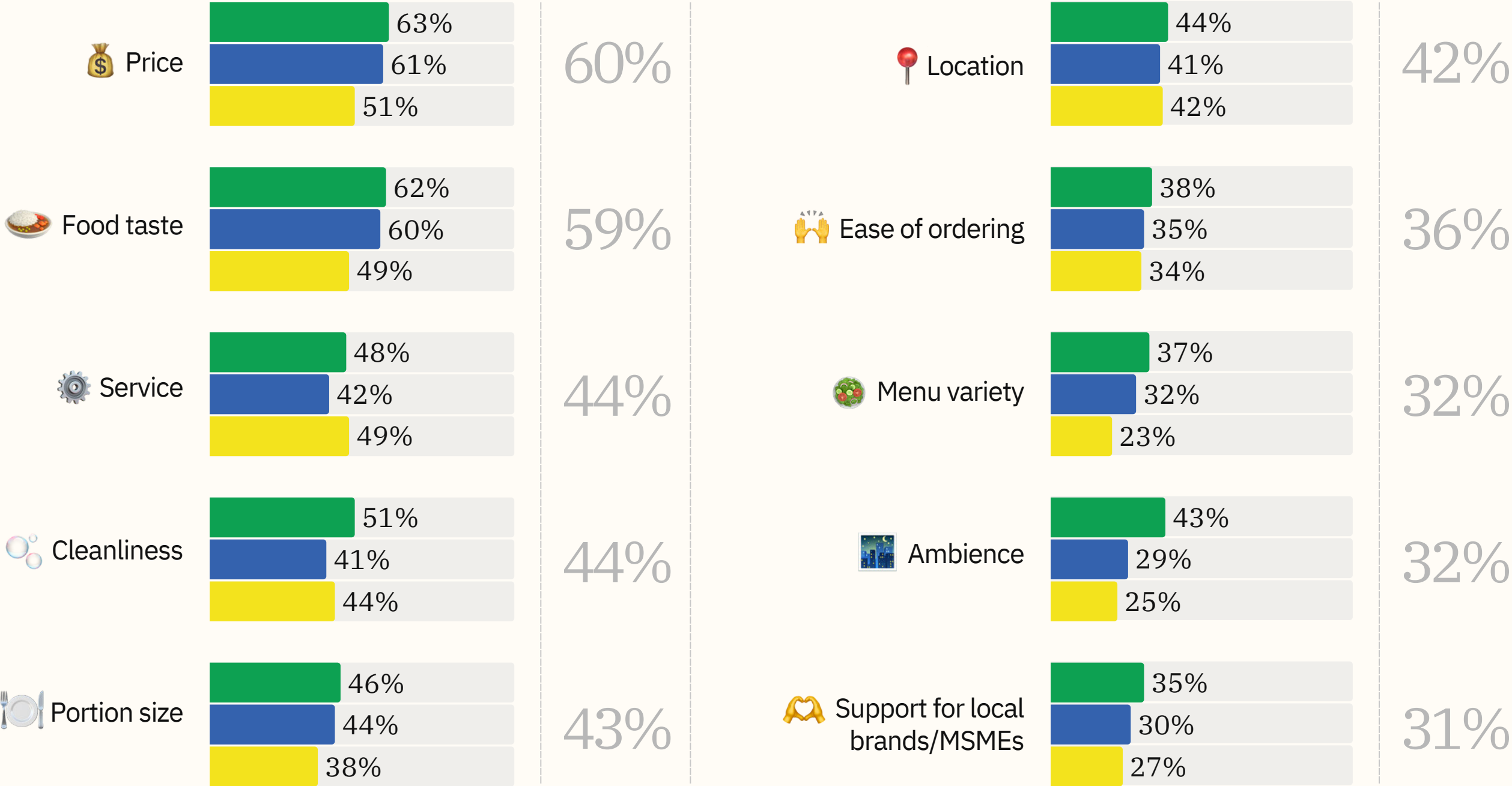


3 out of 5 choose a dining place for its *affordability* and *flavor*

n= 769 respondents who eat out

Preference of eating out

● Upper SES ● Middle SES ● Lower SES



Consumers mainly choose a place to eat based on price and taste. Factors such as service, cleanliness, and portion size also influence their decision, especially among upper and middle SES diners.



Reality differs from *expectations* when *dining out*

n= 769 respondents who eat out

People consistently rank price and food taste as the most important factors when choosing a place to dine. However, factors like service and cleanliness become far more significant in reality.

This indicates that while initial intentions are about cost and quality, a positive dining experience is ultimately defined by operational details.

10 most important factors in choosing a dining place

EXPECTATIONS WHEN CHOOSING A PLACE TO EAT IN GENERAL	RANK	REASONS FOR CHOOSING TO DINE AT A PARTICULAR PLACE
PRICE 💰	1	💰 PRICE
FOOD TASTE 🍽️	2	🍽️ FOOD TASTE
LOCATION 📍	3	⚙️ SERVICE
PORTION SIZE 🍴	4	🧼 CLEANLINESS
CLEANLINESS 🧼	5	🍴 PORTION SIZE
RECOMMENDATIONS/REVIEWS 👁️	6	📍 LOCATION
PROMOS/SPECIAL OFFERS 📢	7	👏 EASE OF ORDERING
SERVICE ⚙️	8	🌿 MENU VARIETY
AMBIENCE 🏠	9	🏠 AMBIENCE
FAMOUS PEOPLE HAVE VISITED 👑	10	🤝 SUPPORT FOR LOCAL BRANDS/MSMES

More than *half* prefer *cashless payments*

n= 769 respondents who eat out

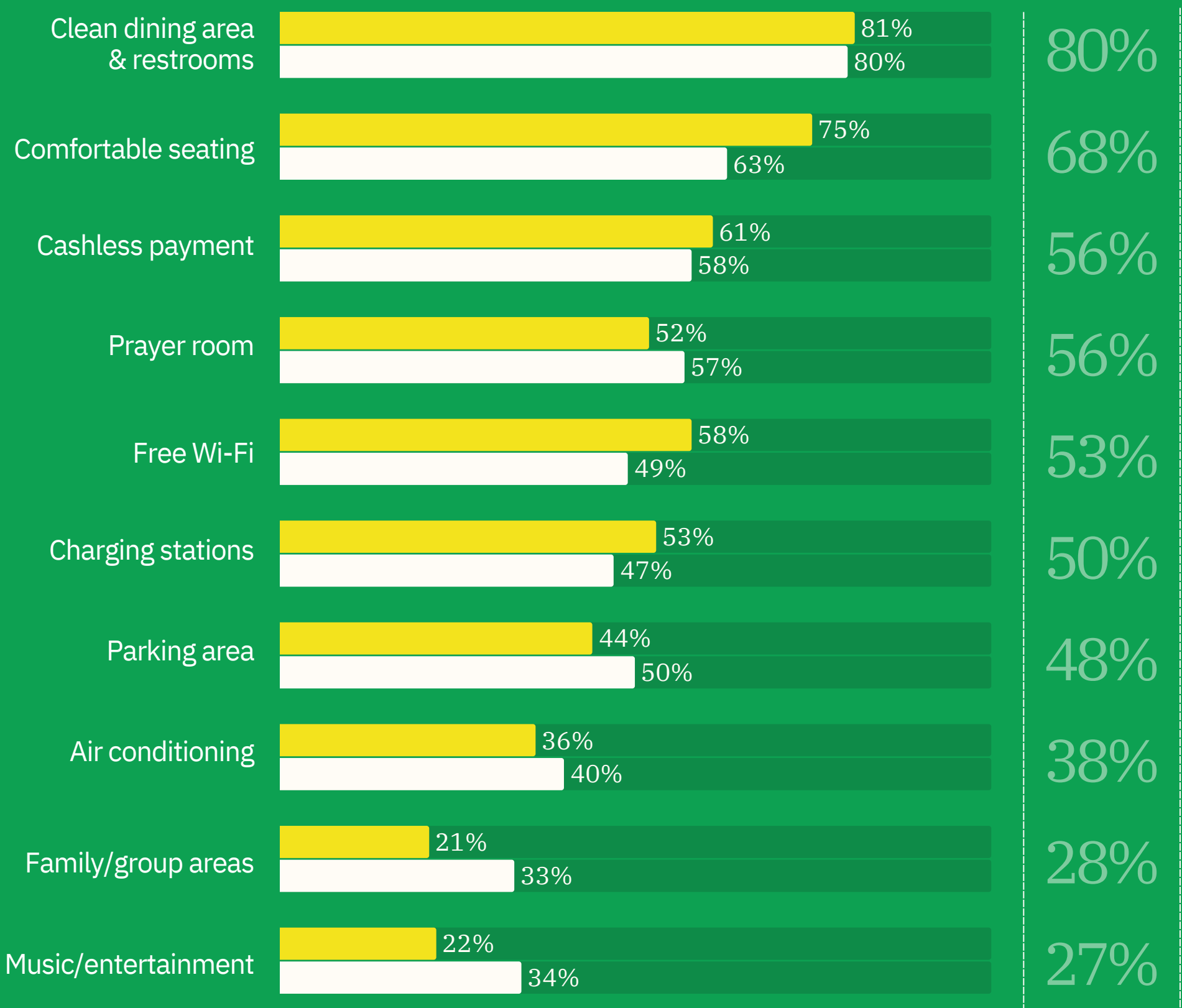
Cleanliness is the most important factor when selecting a place to eat. **Students prioritize comfortable and user-friendly facilities, such as Wi-Fi and charging stations, while workers focus on practical needs like parking, air conditioning, and a family-friendly space.**



27% of visitors consider music or entertainment important when dining out

Essential facilities when dining in

● Student ● Worker

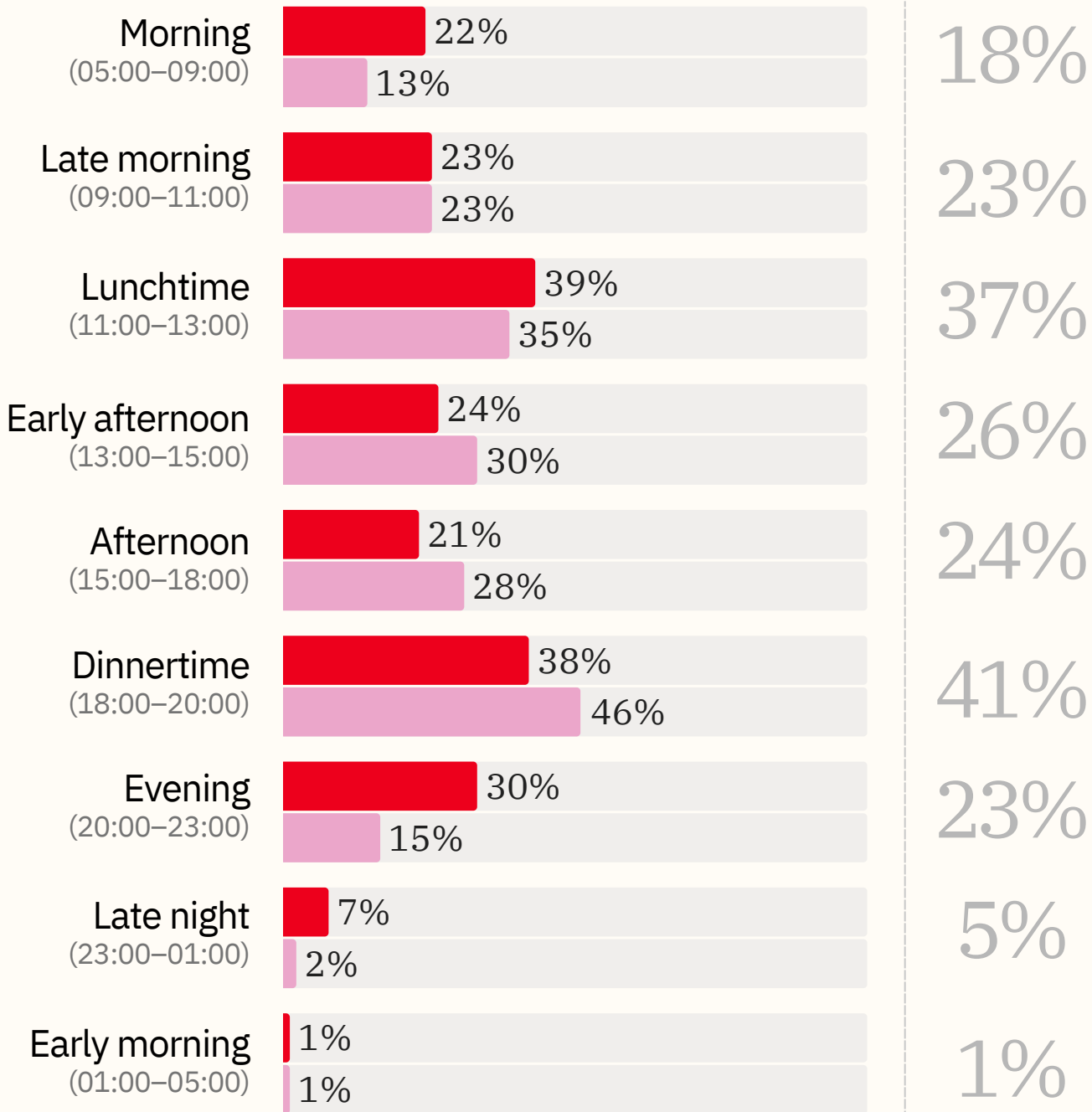


41% of respondents usually *dine out for dinner*

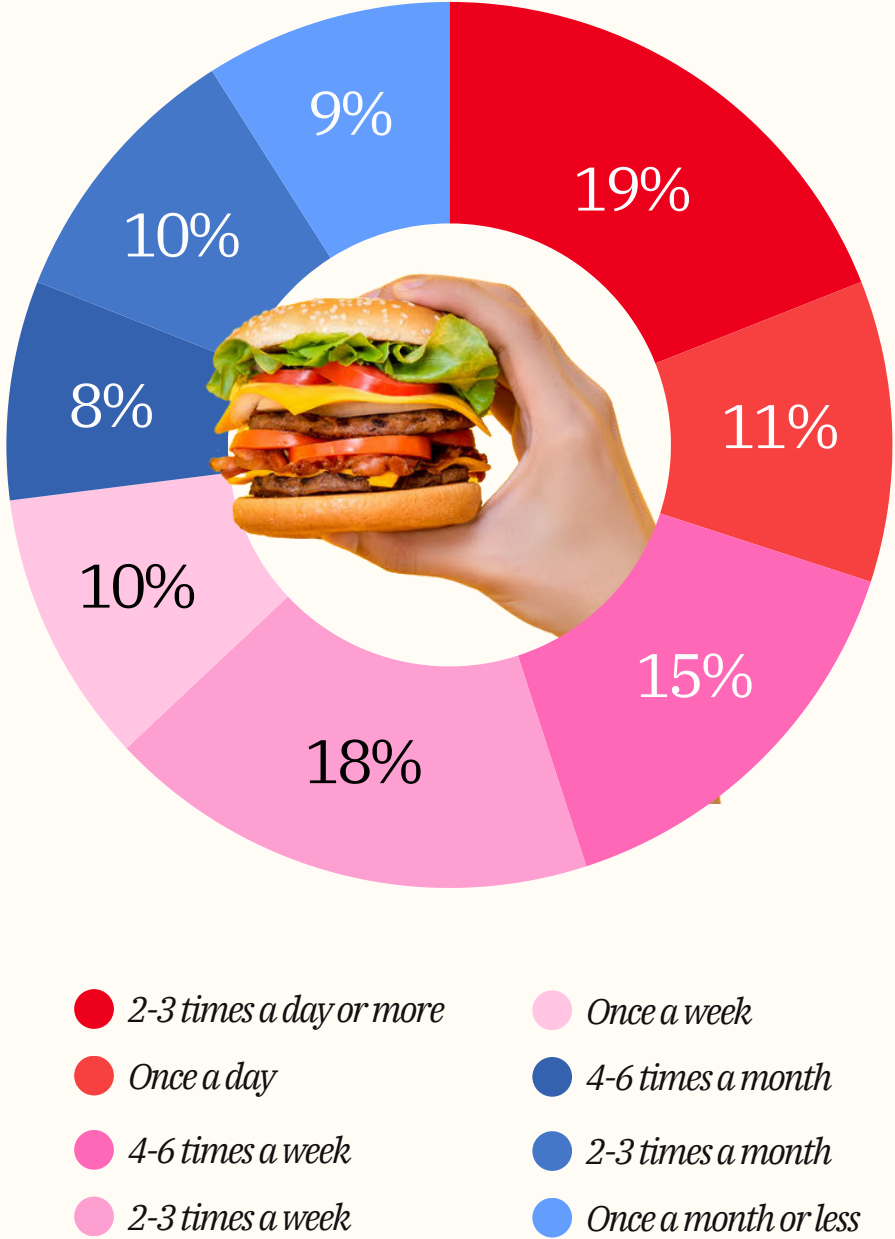
n= 769 respondents who eat out

Usual time for dining out

● Male ● Female



Dining-out frequency



Most people tend to dine out around lunchtime and dinnertime. Women are more likely to eat out in the evening, while men show slightly higher activity in the late-night and morning slots.

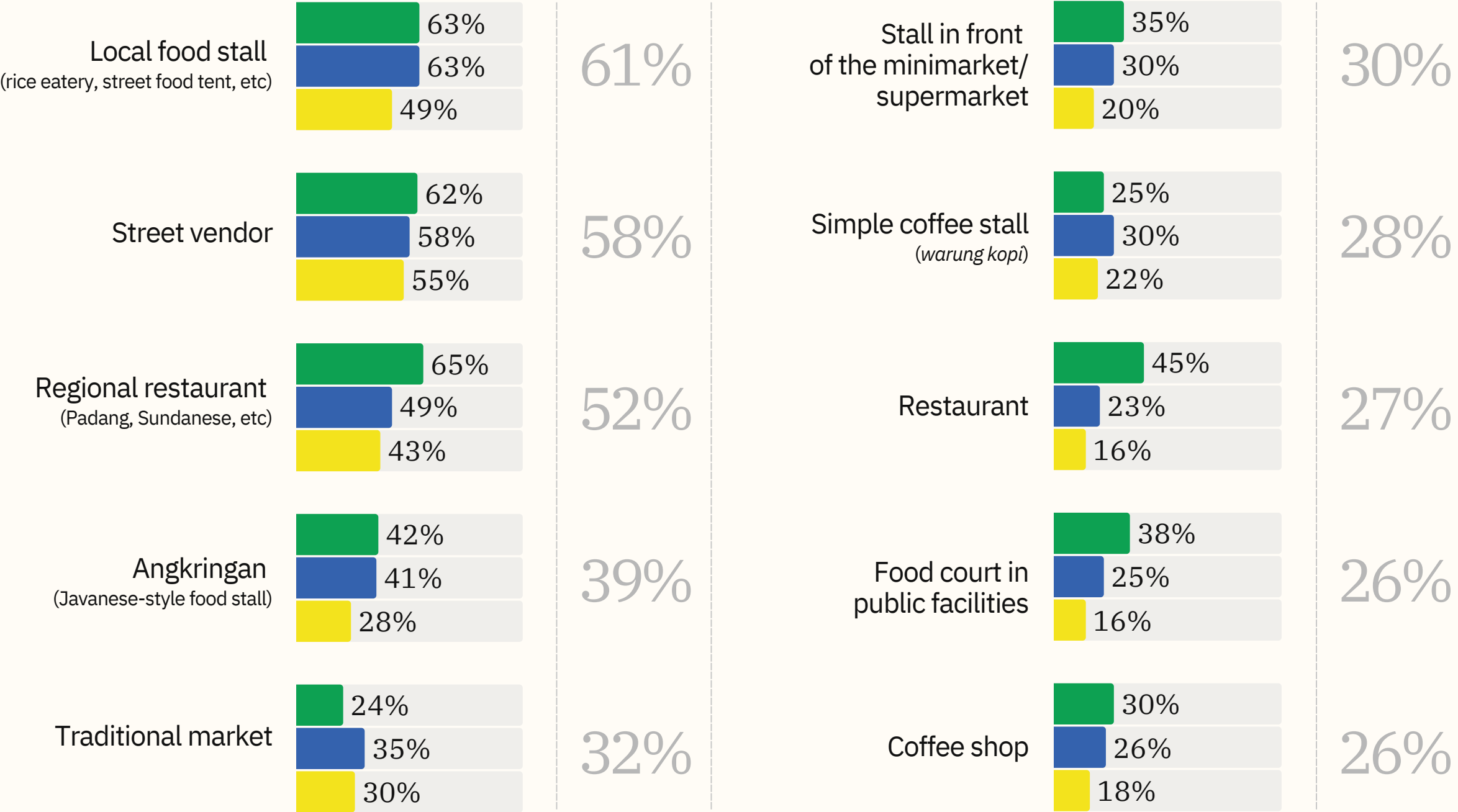


1 out of 5
people eat out more than once a day

3 out of 4 go to the local food stall

n= 769 respondents who eat out

Place to eat out ● Upper SES ● Middle SES ● Lower SES



Affordable local options like food stalls remain the go-to choice for dining out.

Upper SES diners, however, show a stronger tendency to choose regional restaurants and formal restaurants compared to other groups.



Almost 40% of people love to eat at angkringan

Noodles & soups are the most favorite local heavy meals

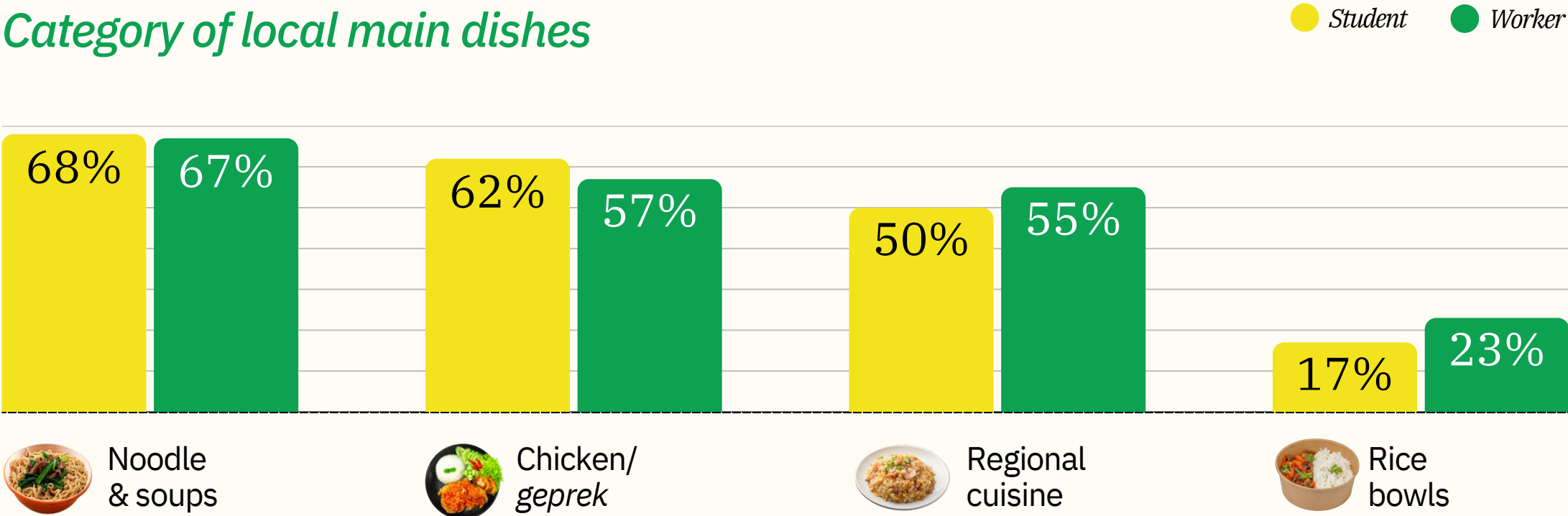
n= 769 respondents who eat out

Noodles and soups are the most popular local meals, followed by chicken dishes like *geprek**. Workers show a slightly stronger preference for regional cuisine and rice bowls compared to students.

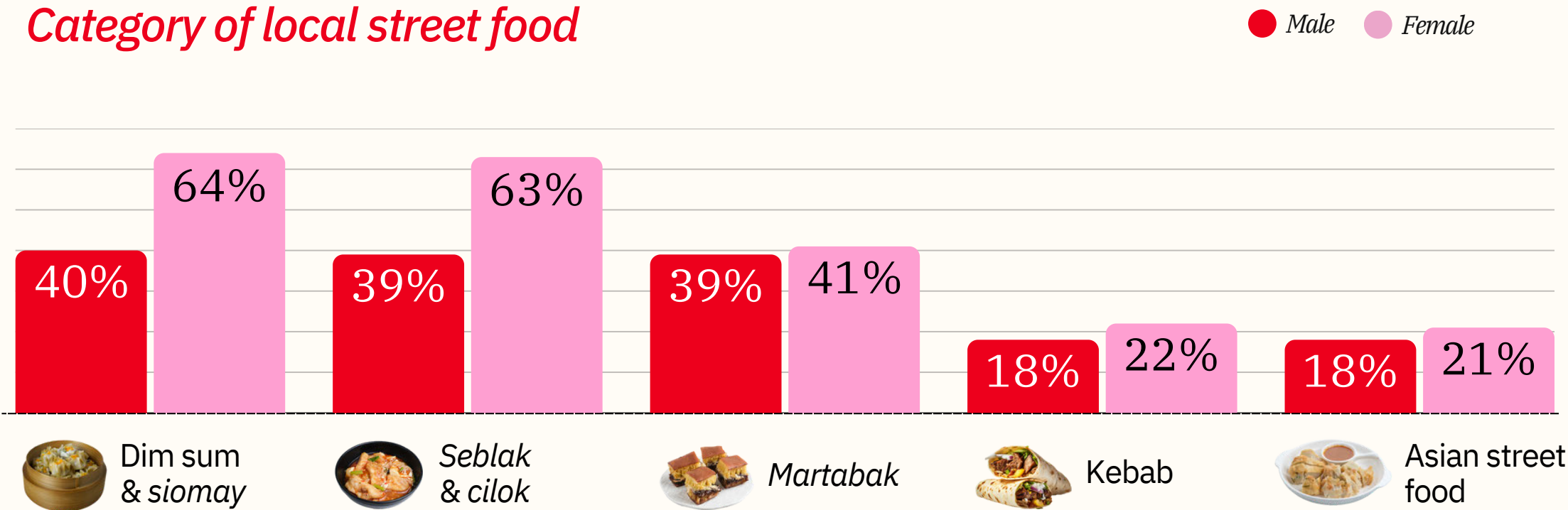
Female consumers show stronger preferences for local snacks such as dim sum, *siomay*, *seblak*, and *cilok*. While male consumers display more balanced choices across different snack types, with *martabak* standing out as a common option for both.

*Indonesian dish of crispy fried chicken smashed with a spicy chili paste called sambal.

Category of local main dishes



Category of local street food



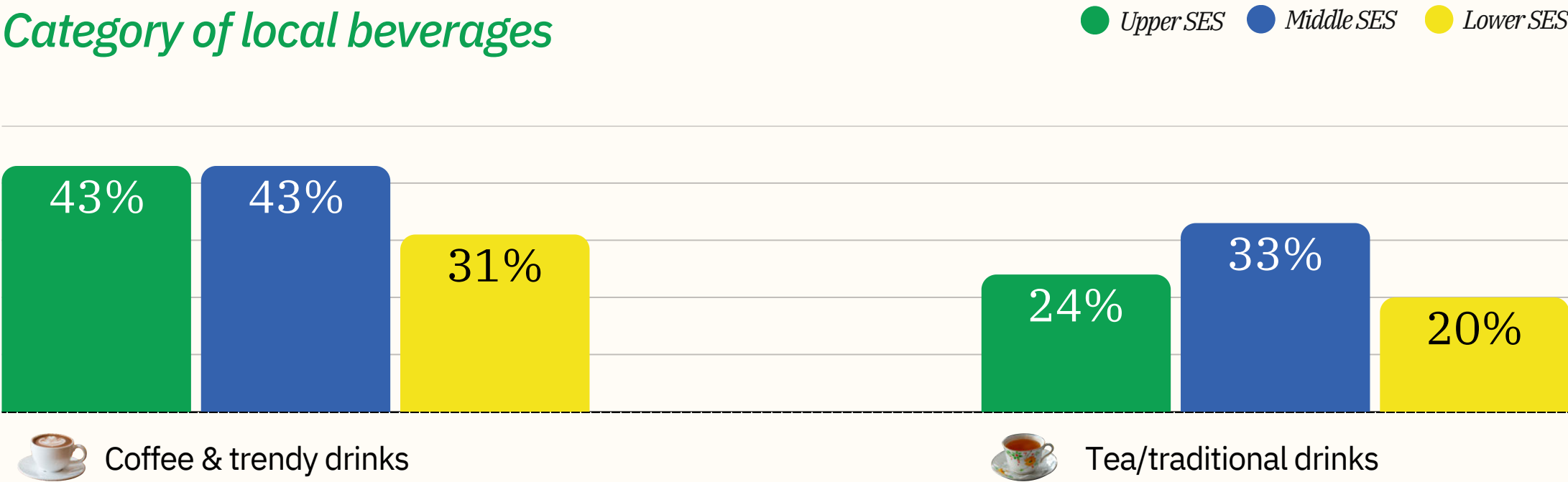
45% of *women* enjoy eating *local ice cream*

n= 769 respondents who eat out

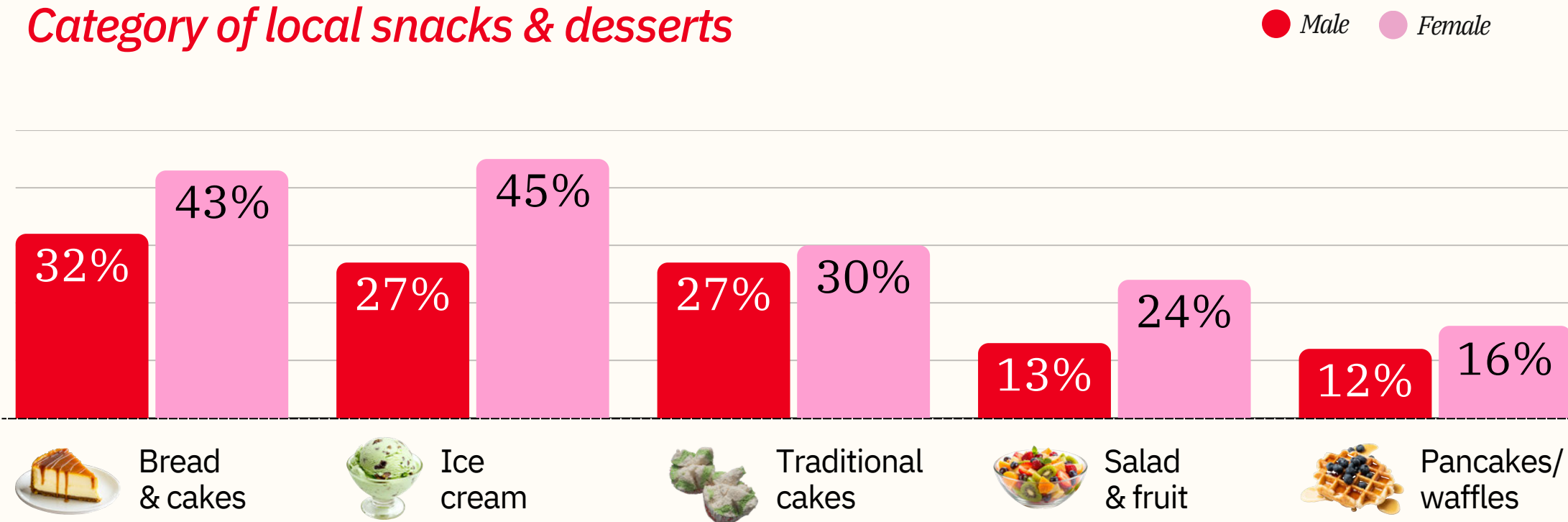
Coffee drinks are the preferred choice for upper and middle SES consumers, while tea and traditional drinks hold more appeal among the middle-SES segment. Lower SES groups show lower preference overall for both options.

Female consumers show higher interest in sweet and light options like bread, cakes, and ice cream compared to males. Traditional cakes remain relatively balanced between the two genders.

Category of local beverages



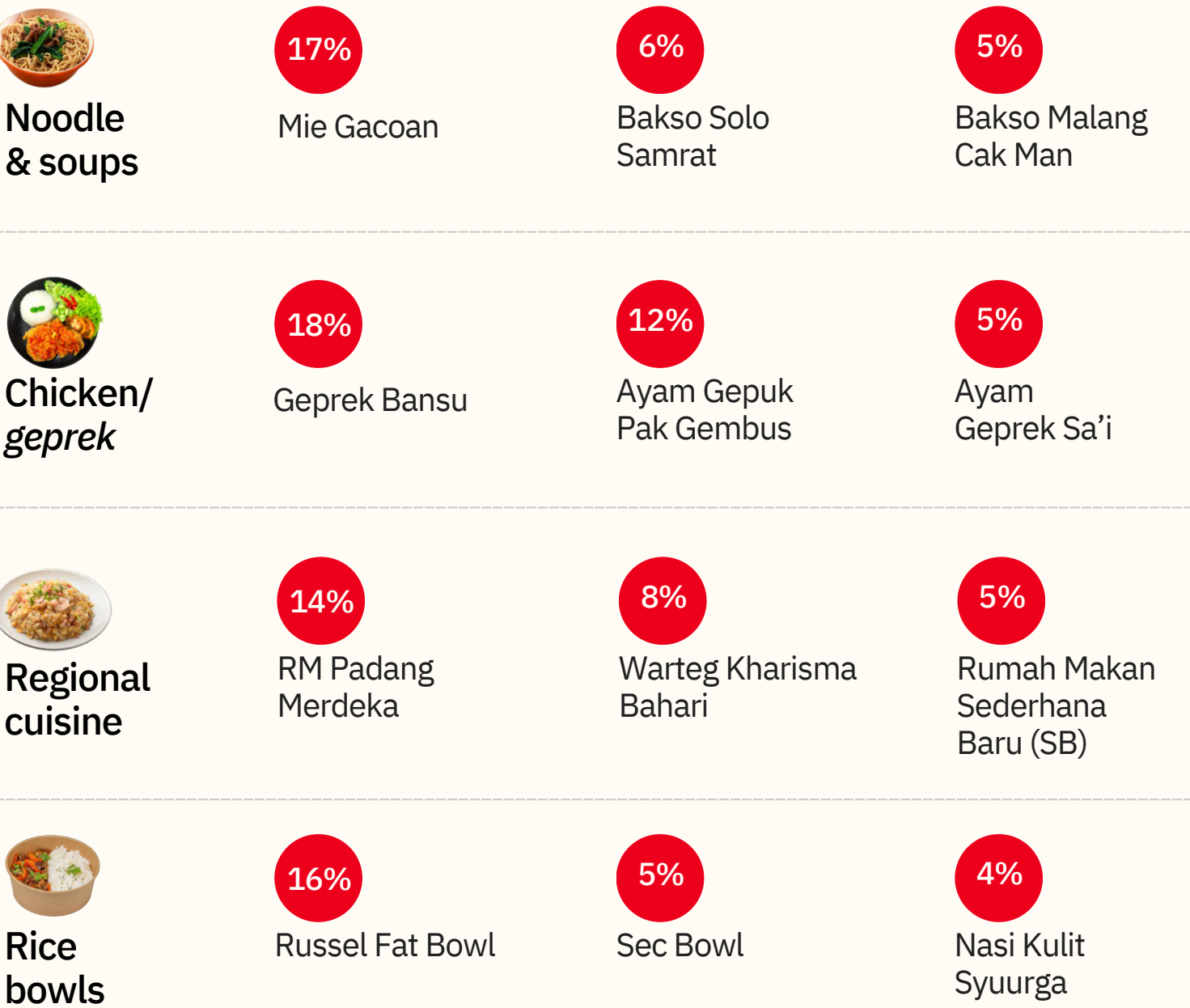
Category of local snacks & desserts



The average price of main dishes is under IDR 25K

n= 769 respondents who eat out

Top 3 local main dish brands



Cost of a single serving of local main dishes

FOOD CATEGORY				
Price range	Noodles & soups	Chicken/geprek	Regional cuisine	Rice bowls
Under IDR 20.000	58%	53%	46%	26%
IDR 20.000 - 30.000	30%	33%	40%	42%
IDR 30.001 - 40.000	8%	9%	4%	14%
IDR 40.001 - 50.000	2%	1%	5%	4%
IDR 50.001 - 60.000	0%	2%	1%	11%
IDR 60.001 - 70.000	0%	0%	0%	1%
Above IDR 70.000	2%	2%	4%	2%
Average price	IDR 22.101	IDR 22.989	IDR 24.116	IDR 30.361

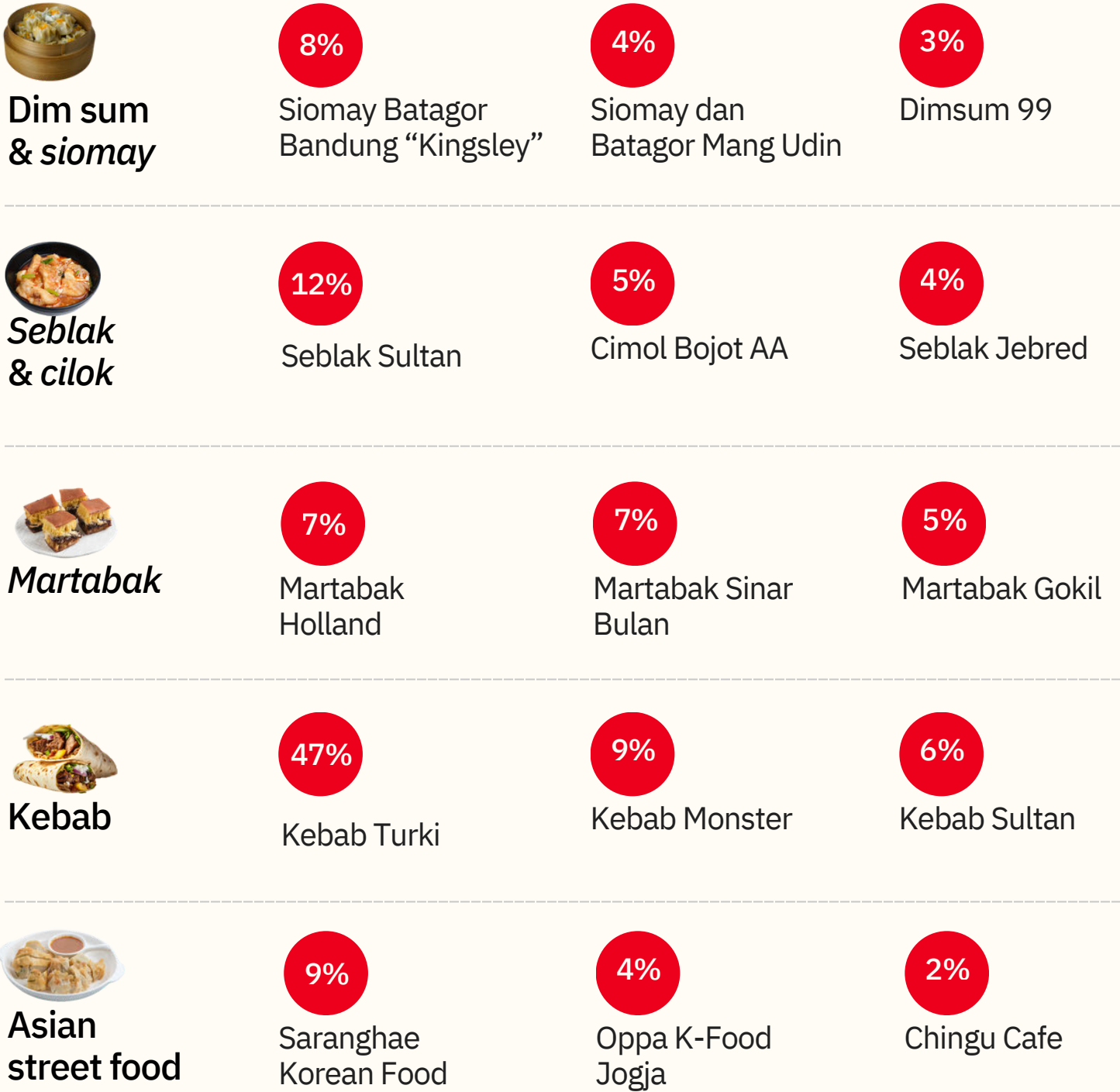
Most local heavy meal choices fall within the affordable range of under IDR 20.000, with a percentage of around 50% of each. In contrast, rice bowls typically have higher prices, making them more commonly purchased in the mid-to-premium range.

Geprek Bensu is the leading brand among the listed dishes, with the highest percentage (18%) in the chicken/geprek category.

Nearly *half* favor *Kebab Turki Baba Rafi*

n= 769 respondents who eat out

Top 3 local street food brands



Cost of a single serving of local street food

FOOD CATEGORY					
Price range	Dim sum & <i>siomay</i>	<i>Seblak</i> & <i>cilok</i>	<i>Martabak</i>	Kebab	Asian street food
Under IDR 20.000	60%	74%	16%	26%	9%
IDR 20.000 - 30.000	26%	18%	49%	45%	38%
IDR 30.001 - 40.000	8%	3%	21%	10%	19%
IDR 40.001 - 50.000	2%	2%	6%	10%	15%
IDR 50.001 - 60.000	1%	2%	1%	3%	3%
IDR 60.001 - 70.000	1%	1%	0%	2%	4%
Above IDR 70.000	2%	0%	7%	4%	12%
Average price	IDR 22.581	IDR 20.020	IDR 32.635	IDR 31.354	IDR 40.889

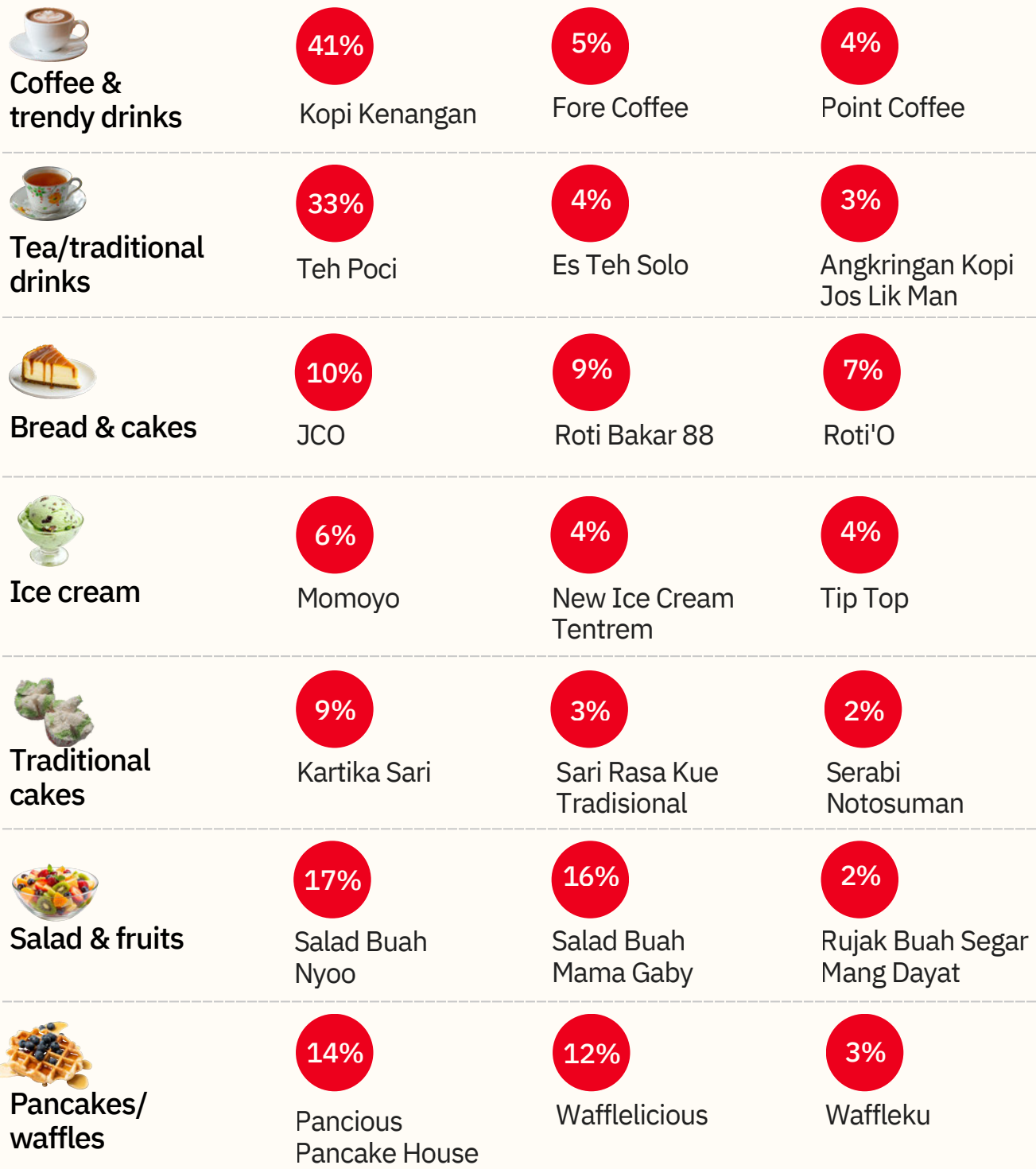
People tend to spend under IDR 20.000 when buying dim sum or *seblak*. Meanwhile, *martabak* lovers on average buy it for Rp32.635 per serving.

Kebab Turki Baba Rafi is the brand most frequently purchased by the respondents.

Pancakes typically cost about IDR 36K on average

n= 769 respondents who eat out

Top 3 local beverages & snacks



Cost of a single serving of local beverages & snacks

FOOD & BEVERAGE CATEGORY

Price range	Coffee & trendy drinks	Tea/traditional drinks	Bread & cakes	Ice cream	Traditional cakes	Salad & fruit	Pancakes/waffles
Under IDR 20.000	38%	76%	56%	57%	69%	42%	18%
IDR 20.000 - 30.000	43%	13%	22%	23%	14%	32%	37%
IDR 30.001 - 40.000	10%	4%	9%	8%	8%	9%	11%
IDR 40.001 - 50.000	6%	4%	5%	7%	3%	11%	13%
IDR 50.001 - 60.000	1%	2%	2%	1%	3%	1%	9%
IDR 60.001 - 70.000	1%	0%	1%	3%	1%	1%	6%
Above IDR 70.000	1%	1%	5%	1%	2%	4%	6%
Average price	IDR 25.316	IDR 20.640	IDR 25.307	IDR 24.468	IDR 22.349	IDR 27.588	IDR 36.922

Around 40% of consumers pay IDR 20.000–30.000 for coffee or trendy drinks, whereas traditional cakes are usually bought for under IDR 20.000.

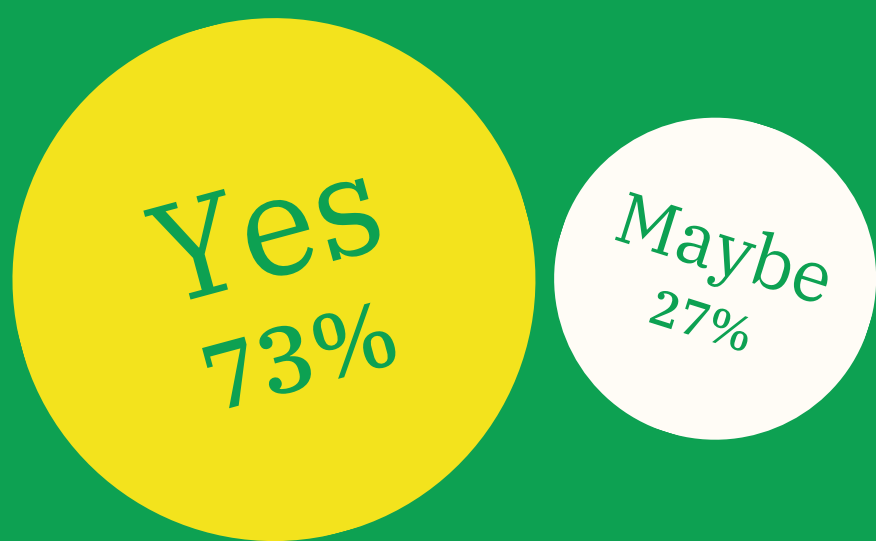
Kopi Kenangan and Teh Poci are local beverage brands favored by a significant number of respondents.

Most people are *enthusiastic* about exploring *new dining spots*

n= 769 respondents who eat out

Affordable pricing is the strongest driver for trying a new dining place, followed by menu uniqueness and promotions. Students respond more to location and reviews, while workers are slightly more influenced by service, ads, and recommendations.

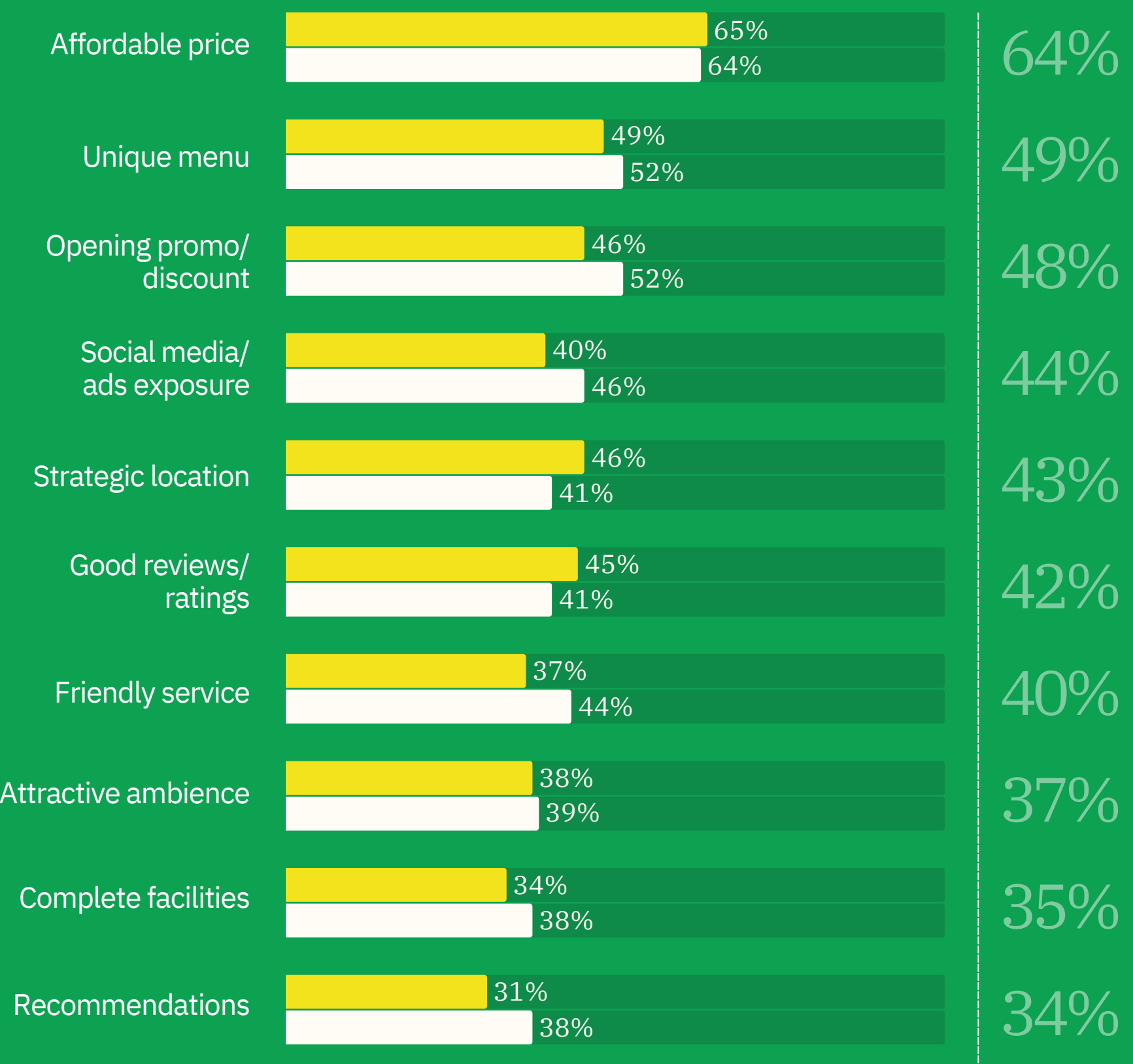
Interest in trying a new dining place



3 out of 4 are interested in trying new places to eat

Reasons to try a new dining place

● Student ● Worker



1 out of 3 people notice a new restaurant just by passing it

n= 768 consumers interested in trying a new dining place

Word of mouth remains the top source for discovering new dining places, with recommendations from close contacts leading the way.

TikTok content, whether from other accounts or official restaurant pages, also plays a strong role, alongside social media ads and food delivery apps.



Sources of information about a new dining place

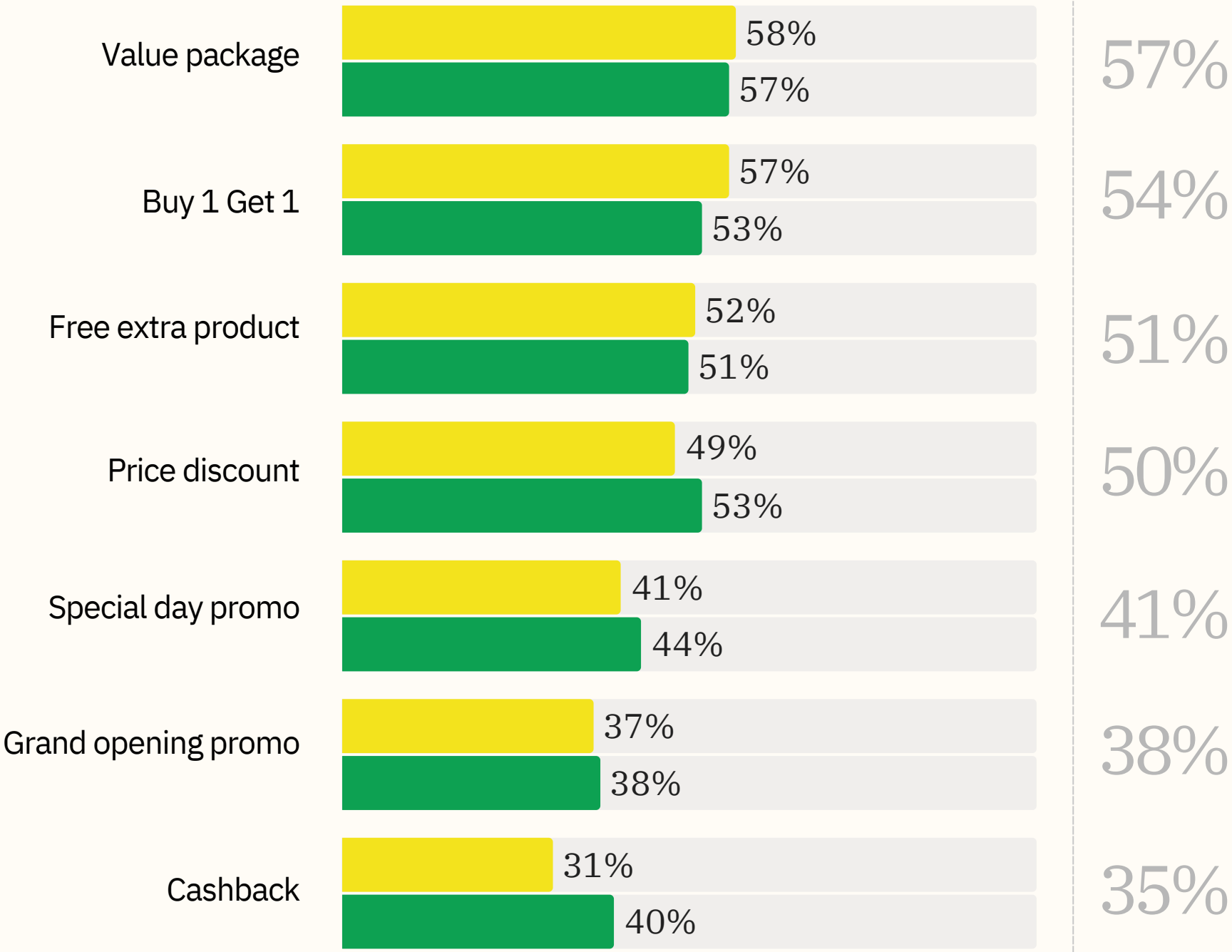


Value package is the most popular food promo

n= 768 consumers interested in trying a new dining place

Popular food & beverage promos

● Student ● Worker



Value packages and “Buy 1 Get 1” deals are the most popular promos at newly opened eateries.

Students prefer instant rewards like “Buy 1 Get 1” or extra products they can get right away, while workers tend to favor calculated benefits such as cashback or discounts.



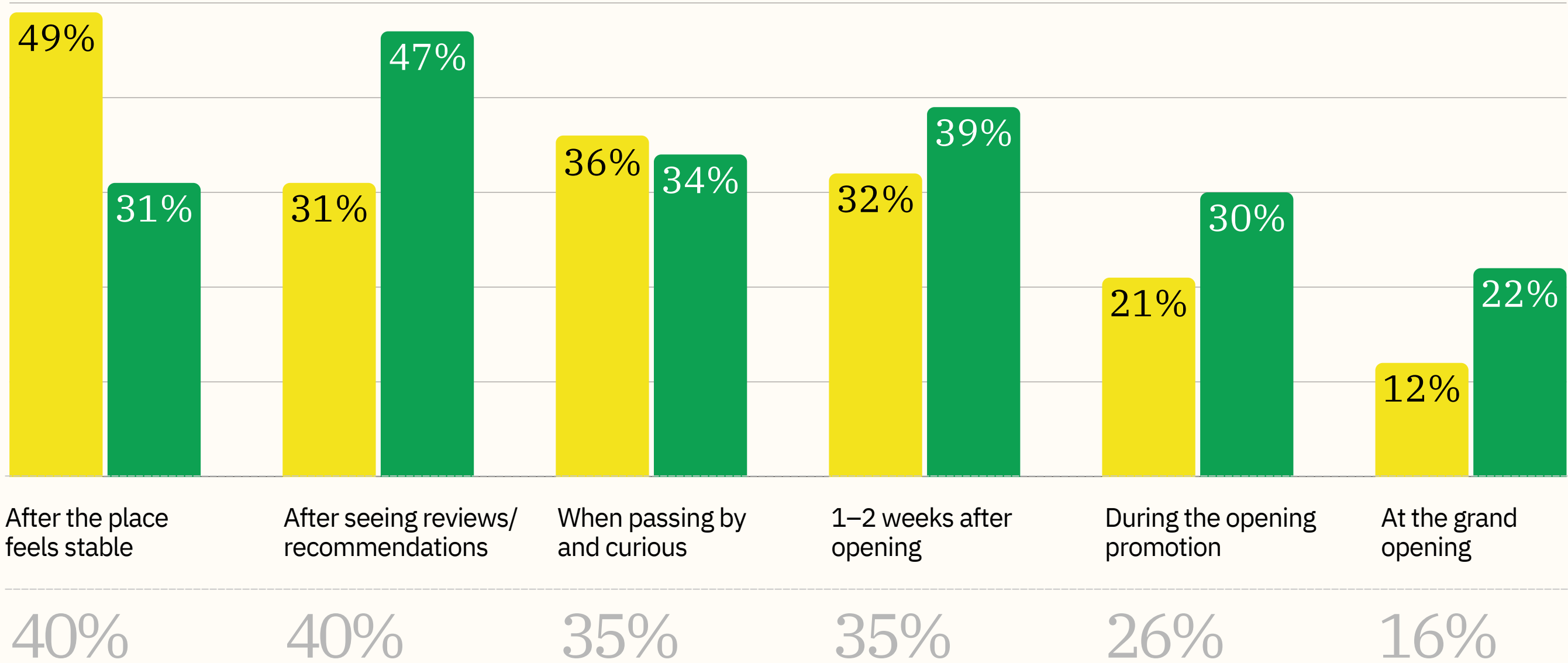
One-third visit new restaurants a while after opening

n= 768 consumers interested in trying a new dining place

Timing to visit a new dining place

Student

Worker



Passing by motivates 1 out of 3 people to try a new restaurant.

Students are more likely to wait until a dining place feels stable before visiting, while workers tend to rely on reviews or recommendations first.

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