Gen Z’s Digital Media Consumption and Activities

by Rossalyn A. Asmarantika

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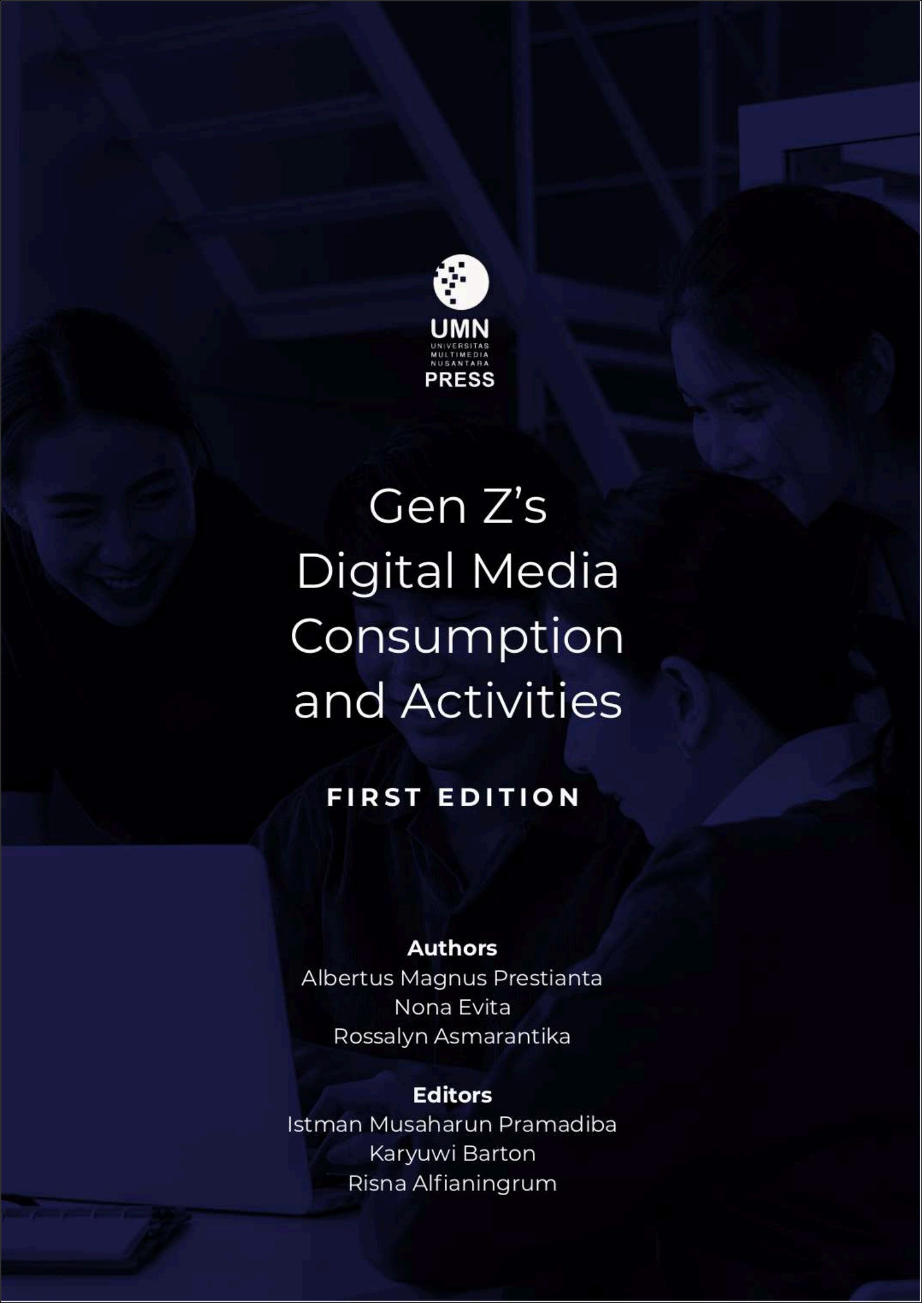
FIRST EDITION

Albertus Magnus Prestianta
Nona Evita
Rossalyn Asmarantika



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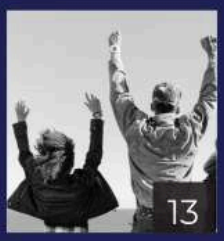
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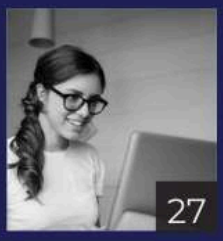
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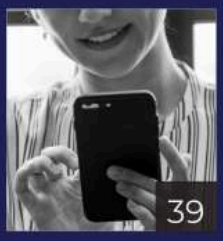
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We are looking forward to our future projects together.

Introduction

Generation Z or Gen Z (plural), born after 1996, are rising. They are now the most significant population cohort, with approximately 2.5 billion people worldwide. The same situation applies in Indonesia. The country's statistics center (BPS) stated in September 2020 that Gen Z now cover 27.94% of the total Indonesian population, leaving Millennials and Generation X in second and third position with 25.87% and 21.88%, respectively.

Gen Z are not only dominating the world right now but also shaping digital activities. They are the first generation of true digital natives, born during the advancement of digital technology. The majority of them have never known a time when ordering takeout online, watching movies through a smartphone, or video calling their family was impossible.

Considered by many as the true digital native, it is expected that Gen Z will spend most of their time in the digital world, consuming digital media and sharing digital content. Many media companies have transformed their products from analog to digital to respond to that notion. They also changed their business model, hoping their products and services would be attractive to Gen Z.

Even though transforming products, services, and business models sound easy, it is easier said than done. Many things need to be considered, from where Gen Z spends most of their time, how much money they spend, to what kind of digital content they want. How Gen Z consume digital media and share digital content is different from previous generations.

One of the most common knowledge about 'the relationship' between Gen Z and digital media is that Social Media has become the gateway for everything. Gen Z are known for being empowered and active social media users; therefore, their connection with digital products and services is mainly established through social media. In addition, Gen Z are also wise buyers, which means they will not waste their money on digital content.

To understand Gen Z more, UMN Consulting conducted a research to learn more about the generation during the third quarter of 2021. With the help of researchers from **Universitas Multimedia Nusantara (UMN)**, we managed to survey **1177 Gen Z respondents across Indonesia.** They came from various islands, from Sumatra to Papua. The research itself is Quantitative, in which the data were collected through online questionnaires as the pandemic restricted researchers to doing onsite surveys.

During the process, we asked dozens of questions to the respondents. We tried to understand as much as possible about how they consume digital media such as news

and social media. In the end, we got so many surprising answers that we believe will be beneficial (and necessary) in shaping media companies' approaches to Gen Z.

The last few years, many media companies have tried several strategies to transform their business and to target Gen Z. Some have found success, but there are still many who are still in the middle of experiment phase.

Like every experiment, data and insights are needed to take the best approach and direction. Within this book, you will find a wide-range of data regarding Gen Z's digital media consumption and activities, from data about the state of news media to insights about Gen Z and subscription model. We firmly believe the data and insights will be beneficial for your media business.

Last but not least, it is worth noting that the research was conducted in the middle of the current COVID-19 pandemic. Arguably, there is a likelihood that the respondents' answers were affected by the current situation. However, even if the pandemic did affect the respondents' response during the research, it doesn't necessarily mean it will fully determine their digital media consumption and activities.

Executive Summary

Gen Z (plural) have changed the game in the media industries. Previously, media companies could always rely on traditional media and advertising revenue to survive in the market. Now, because Gen Z dominate the population and are known as the true digital native, media companies need to 'digitize' themselves to attract them soon (Kalim, 2021).

Even though the objective is clear, approaching Gen Z through digitalization is not an easy matter. One of the reasons is that Gen Z have specific lifestyle and consumption habits. They are different from the previous generations like Gen X or Millennials; therefore, they can only be approached in particular ways (Cole et al., 2015). For example, approaching Gen Z through social media, arguably, is more effective than through traditional media as they like to spend time more (Kastenholz, 2021).

The other reason is that digitizing media is a whole different game compared to producing traditional media. Digitizing media means changing products' characteristics from format, content, pricing, to business models (World Economic Forum, 2016). It is not a project that can finish overnight.

For the last few years, lots of media companies have tried several strategies to target Gen Z. Some of them are about emphasizing presence on social media, utilizing influencers to gain traffic, and implementing subscription models to increase customer retention (Kalim, 2021). Some have found success, and some are still experimenting.

In our ***Gen Z's Digital Media Consumption and Activities*** research, we explored every element that affects Gen Z's consumption of digital media and activities in the digital realm. Even though we do know that Gen Z are digital natives, we believe there is more than meets the eye.

During the research, we observed several aspects, which later were divided into seven sections: **Self-Values, Media Consumption, Social Media, News Media, Influencers, Subscription Model, and Digital Marketing.** Each section will give you detailed insights into how Gen Z consumes digital media and what they want from media companies.

For the Self-Value section, We asked our Gen Z respondents about their primary value. Based on their answers, **Gen Z choose self-transcendence over self-enhancement, which means they prioritize understanding, appreciation, tolerance, and protection for the environment and well-being of people close to them (Schwartz, 2012).**

On the surface, this part does not seem to relate to the research's subject. However, it will be more apparent when you see the other section about how and why Gen Z consume media in the first place, especially digital media.

In line with their digital nature, **Gen Z rely on digital gadgets to consume media. Smartphones have become their 'weapon of choice' to access media content,** with laptops standing as their second choice. They rarely use other gadgets or devices. The different perspective is that portability is important for Gen Z, and they have left traditional media.

Their preference for digital media is even more apparent when we explored Gen Z's media activities during the research. For example, **media with the highest number of access from Gen Z are digital media such as Messenger, Social Media, and Streaming Platform.** Meanwhile, printed media such as tabloids, newspapers, and magazines are left behind. **During the research, almost half of our respondents even admitted that they never consume traditional media.**

With digital gadgets and media becoming their primary choice, Gen Z will inevitably spend most of their time in the digital realm. According to the research's results, **Gen Z can spend more than 8 hours per day in the digital realm with their top three activities are listening to music, watching online videos, and socializing through social media.**

When it comes to social media, Instagram is the most popular among Gen Z with 95.8%, followed by Whatsapp (94.2%) and Youtube (87.9%). Even though Tiktok has gradually become popular among Gen Z, it stands in fifth place according to the result. There is a possibility that Tiktok will become more popular in the future as our Gen Z respondents admitted they enjoy short-video content during the research.

As Gen Z grew up during the advancement of social media (Turner, 2018), most of them have used social media for a long time. Almost half of our respondents admitted they have used social media for around 5-10 years. It indicates that **Gen Z have used social media even before teenagehood**. Initially, they used social media for social interaction, communication channels, and following the latest trends. However, as time goes by, their priority shifts. **Today, social media is more for communication channels, finding entertainment, and filling their spare time.**

Social media are not only Gen Z's main social and communication platform but also playgrounds for influencers. Arguably, it is hard to separate social media from influencers as the platform allows them to use their capabilities to shape public opinion or inspire them (Matthew, 2018). According to our Gen Z respondents, several characteristics define influencers. Some of them are **Influential, Prominent, Have Massive Number of Followers, and, most importantly, Active on Social Media.** Some of the most popular influencers among our Gen Z respondents are **Arief Muhammad, Maudy Ayunda, Titan Tyra, Jerome Polin, and Raffi Ahmad.**

What Gen Z see from those influencers are **Inspirational Content, Humor, Special Skills, and Knowledge.**

The 'existence' of social media and the downward trend of traditional media raises the question of whether Gen Z still consume news media or not. **Our research shows they still do with social media serve as their primary access to news media. This shows that news media consumption by Gen Z tends to be incidental.**

Despite social media becoming their primary channel for accessing news, Gen Z still hold specific standards regarding news media. **According to them, news media should be Trustworthy, Accurate, Credible, High-Quality, and Up to Date.** Those standards align with Gen Z's characteristics which are more critical and well-informed than their predecessors. For Gen Z, those standards are essential. They consume news media to get the latest information and references. For them, **news media are a tool to dig deeper into every information they get from their community.** Therefore, the news media must be trustworthy and accurate. Gen Z will feel like being lied to if what they get is the other way around.

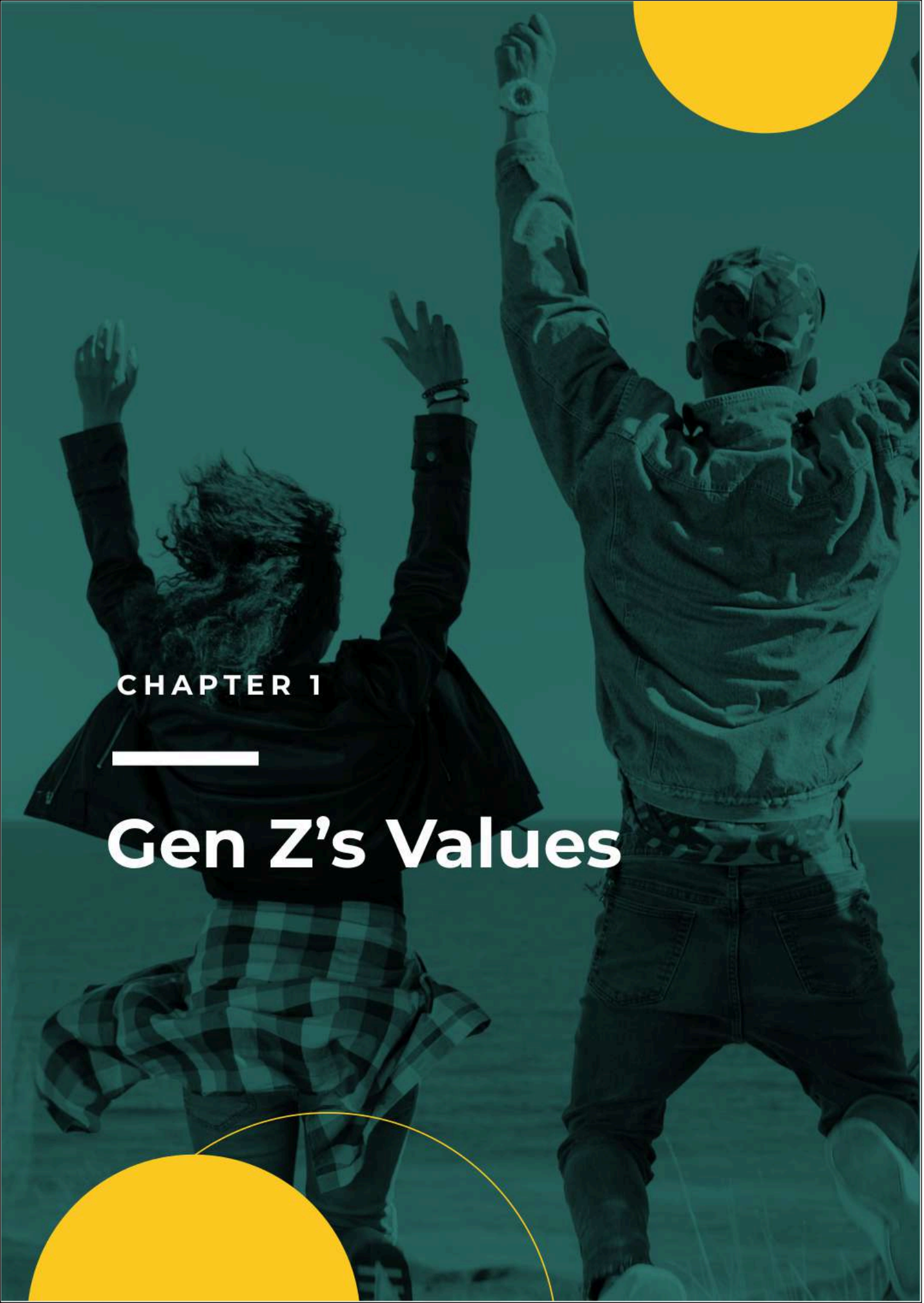
In addition, their top-of-mind media is Kompas, Detik.com, Kompas.com, and CNN. Interestingly, Line is standing in fifth place, which is more of an online news aggregator than pure news media. Another interesting take from that finding is that there is only one television news channel among the top five which further strengthens the digital nature of Gen Z.

Gen Z are not only still consuming news media but are open to subscribing to or buying their premium content. As previously mentioned, Gen Z are looking for high-quality content, and most of those content stands behind a paywall. According to our research, **the top three news media subscription services with the highest access by Gen Z are Kompas.id, Tempo.co, and The Jakarta Post.**

If we talk about subscriptions in general, news media are not among the top five most subscribed brands by Gen Z. **The list is dominated by streaming services, with Disney+ in the first place, followed by Joox, Amazon Prime, Youtube Premium, and HBO GO.** Those findings, further reinforcing the fact that Gen Z spend most of their time in the digital realm watching online videos and listening to music.

It's worth noting that our research shows Gen Z prefer a monthly subscription plan instead of an annual one. The monthly subscription plan gives them certain flexibility in spending as most of them are still relying on their parents. **More than 50% of our respondents are only willing to spend around IDR 50,000 to IDR 100,000 per month for a subscription.**

The fee is not the only deciding factor when it comes to subscriptions. In fact, according to our research, it is not the top factor. **Some of the reasons that can make Gen Z want to subscribe to a media are personalized content, ad-free content, and high-quality content.**



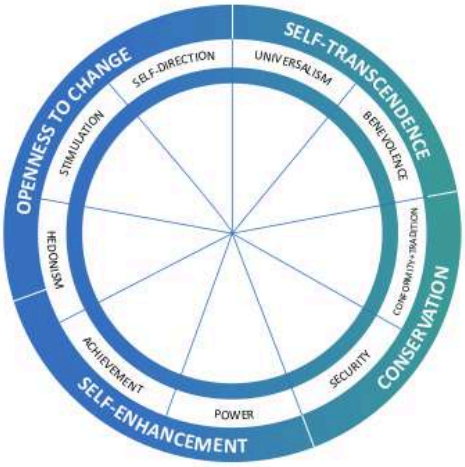
CHAPTER 1

Gen Z's Values

When it comes to discussing self-value, each of us holds multiple values with varying degrees of importance. These values play an essential role in guiding one's motivation and goal as they serve as standards and criteria for decision making. In short, to know Gen Z better, it is recommended to understand their self-values first.

Shalom H. Schwarts's theory of fundamental human values (2012) can be used as a guide to study this matter. The theory argues that ten personal values define human principles of life. Each value is different based on its underlying goal or motivation. Furthermore, those ten values are also related to three universal requirements of existence: biological needs, social interaction, and welfare needs.

Schwartz himself tested the theory in dozens of countries and found that each value has dynamic relations.



Basic Value	Definition
Self-Direction	Independent thought and action
Stimulation	Choosing, creating, exploring excitement, novelty, and challenge in life
Hedonism	Pleasure and sensuous gratification for oneself
Achievement	Personal success through demonstrating competence according to social standards
Power	Social status and prestige, control, or dominance over people and resources
Security	Safety, harmony, and stability of society, of relationships, and of self
Conformity	Restraint of actions, inclinations, and impulses likely to upset or harm others and violate social expectations or norms
Tradition	Respect, commitment, and acceptance of the customs and ideas that traditional culture or religion provides
Benevolence	Preservation and enhancement of the welfare of people with whom one is in frequent personal contact
Universalism	Understanding, appreciation, tolerance, and protection for the welfare of all people and for nature

Gen Z Values

Using the theory, it is evident that Indonesian Gen Z put particular interest into self-values that deal with improving others' welfare, tolerance values, and the protection of nature. This can be seen from the average score of Universalism and Benevolence value which are 8.03 and 8.04 respectively. That means they put Self-Transcendence as their primary value instead of Self-Enhancement. On the other hand, values such as Hedonism and Power have the lowest average score, 4.73 and 5.72 respectively. Schwartz (2012) says individuals with Universalism and Benevolence values are more concerned about the common good than the personal interest, which is heavily related to Hedonism and Power value.

"Looking at the model, Self-Transcendence and Self-Enhancement values are contradictory. So, it's natural for Gen Z to score the highest within Self-Transcendence values," said UMN's Researcher, Nona Evita.

The data also suggests that the assumption of Gen Z being ambitious or prone to hedonism is false. "In reality, those values are far from the truth. This is what Self-Transcendence entails; they (Gen Z) are not selfish and they think about others too," said UMN's Researcher, Rossalyn Asmarantika.

It's worth noting that the current pandemic and economic recession could also play a factor in influencing Gen Z's self values. Everyone is affected during the crisis, which drives Gen Z to do something about it. It can be seen from various humanitarian activities Gen Z participated in or even initiated.

Value	Self-enhancement			Openness to Change		Self-transcendence		Conservation		
Sub-value	Power	Achievement	Hedonism	Stimulation	Self-Direction	Universalism	Benevolence	Tradition	Conformity	Security
Baseline	5.72	7.22	4.73	7.23	7.54	8.03	8.04	6.79	7.77	7.76

Gen Z Values Based on Panel

Data suggests Indonesian Gen Z emphasize Power and Stimulation on their self values. Power means male Gen Z see social status, prestige, control, and resources as essential values. In addition, Stimulation means male Gen Z are interested in creating something, exploring excitement, novelty, and challenge in life.

On the other hand, female Gen Z score their highest average on the other eight aspects of Schwartz's value model.

Those findings show that it's difficult to characterize Gen Z into one fitting definition accurately (Sakdiyakorn et al., 2021).

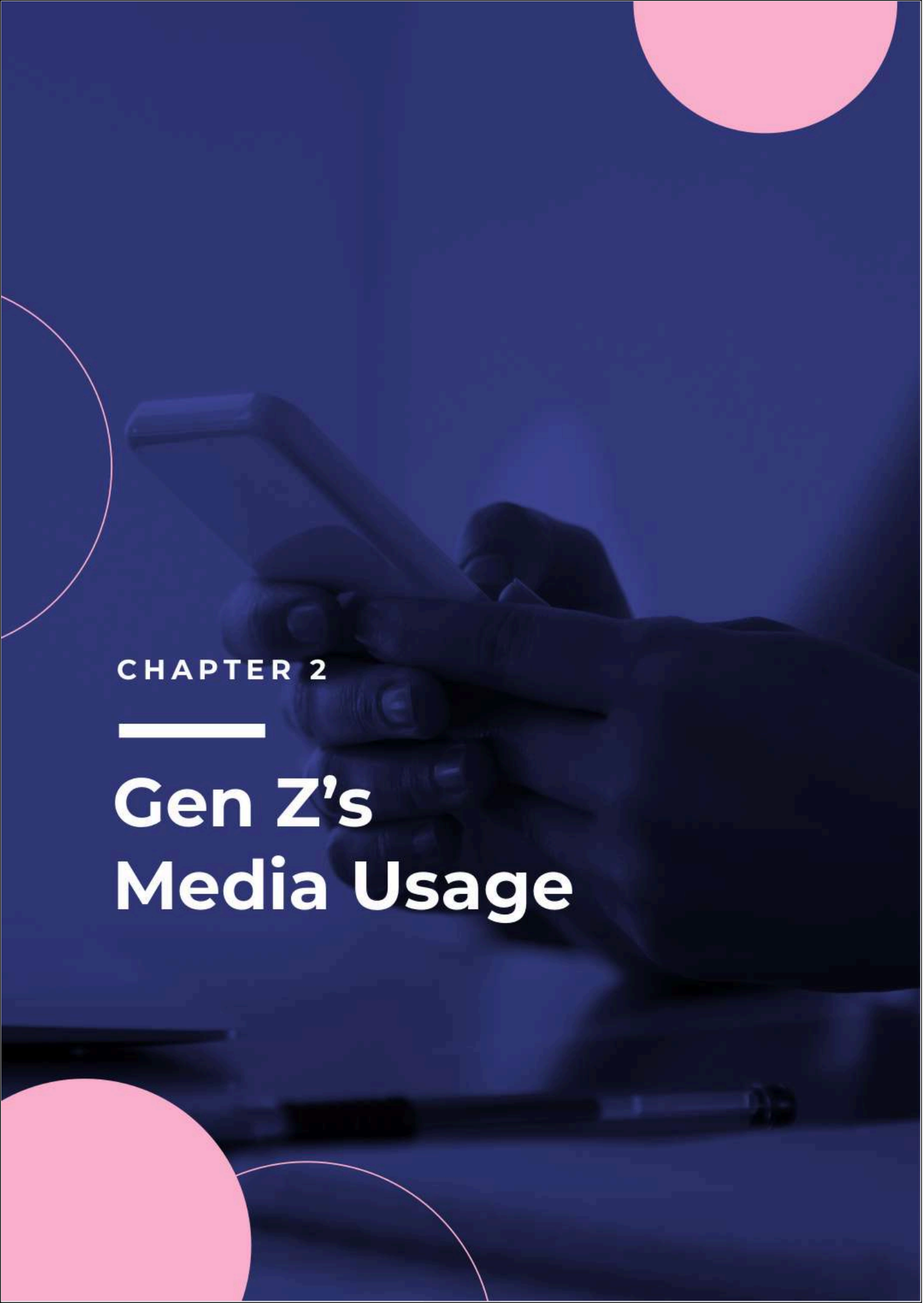
Though Self-Transcendence has the highest score, Indonesian Gen Z also put particular interest in Achievements that falls under the Self-Enhancement value model. Referring back to the model, the nature between Self-Transcendence and Self-Enhancement is contradictory. Seeing that Gen Z have an interesting score under Achievements means that other than being selfless and thinking of others, Gen Z also care about their achievements.

"They have a sense of achievement. From our analysis, it may happen due to the digital social era we're living in. Comparing and being compared is everywhere. It mostly deals with their career, be it their education or work performance," explained Rossalyn during the writing of this report.

Value		Self-enhancement			Openness to Change		Self-transcendence		Conservation		
Sub-value		Power	Achievement	Hedonism	Stimulation	Self-Direction	Universalism	Benevolence	Tradition	Conformity	Security
Baseline		5.72	7.22	4.73	7.23	7.54	8.03	8.04	6.79	7.77	7.76
Gender	Male	5.76	7.05	4.67	7.26	7.50	7.79	7.87	6.44	7.46	7.60
	Female	5.69	7.35	4.77	7.21	7.57	8.20	8.16	7.04	7.99	7.88
Age	Age 15-17	5.49	7.33	4.32	7.29	7.41	8.04	8.12	7.05	7.92	7.78
	Age 18-22	5.83	7.32	4.89	7.27	7.56	8.08	8.11	6.81	7.78	7.74
	Age 23-25	5.77	7.01	4.89	7.12	7.64	7.96	7.89	6.54	7.64	7.77

"Nothing beats achievement for me because It's related to my self-esteem. I wanna work at a well-respected, well-paying company. However, that's not my point in life. I want to be known for my philanthropic contribution. I feel like I have a responsibility to do this since as humans, our species are very destructive."

Dhea Liem, Student (22).



CHAPTER 2

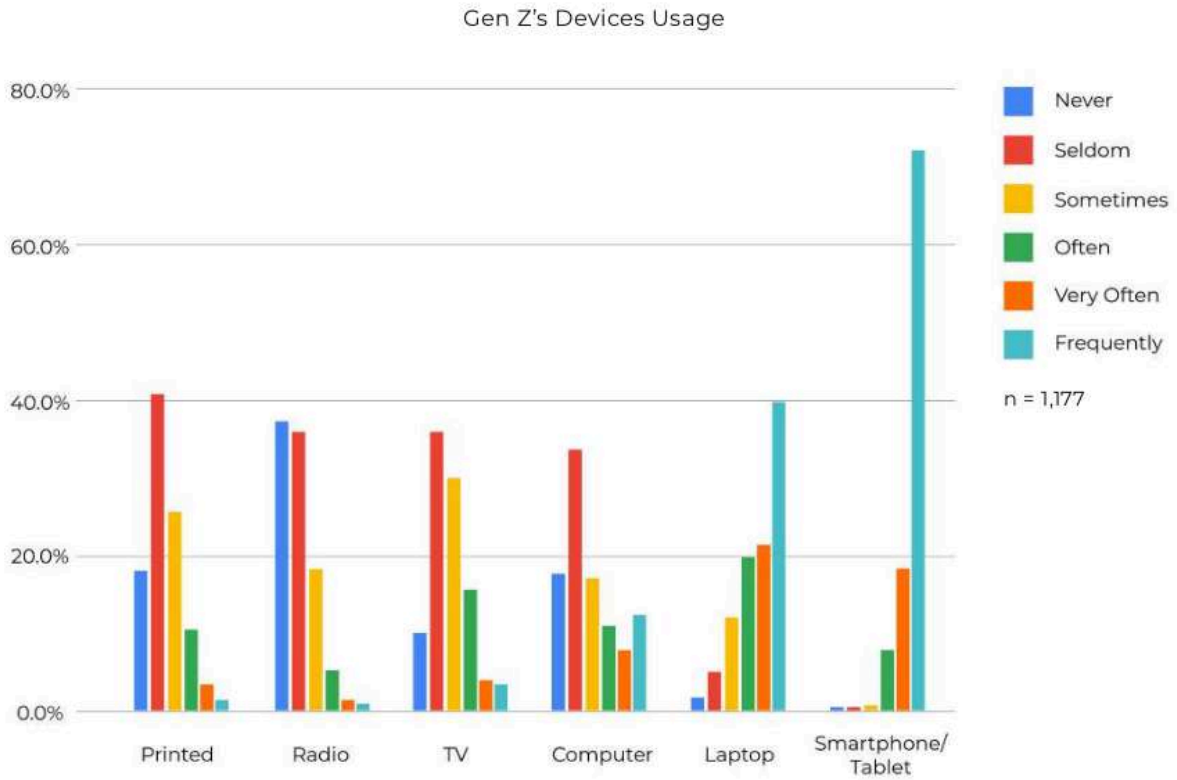
Gen Z's Media Usage

As digital natives, Gen Z's are familiar with using multiple digital devices, accessing various digital content simultaneously (Turner, 2015). BusinessWire in 2020 even reported that 58% of Gen Z cannot go more than 4 hours without digital devices before they turn anxious.

Their "dependence" on digital devices and content has forced media companies to respond. To avoid being left out by Gen Z, they transformed many aspects of their business to be more Digital (read: Gen Z) friendly (Hoefel et al.,2018; Kalim, 2021). To do that, they have started to learn any information available regarding Gen Z's digital nature.

With their digital prowess, Gen Z's characteristics in the digital realm are different from the previous generations, such as Millennials (born between 1981 and 1996), who are considered digital pioneers. Gen Z have their own distinctive preferences when it comes to spending their time in the digital world. Unlike the millennials who value experiences, Gen Z prefer authenticity (Young, 2021).

Mapping out Gen Z's digital media consumption, habits, and activities arguably will give more precise ideas for media companies to make sure their products and services match Gen Z's likings. Data shows that entertainment, references, and filling in spare time is the main purpose of Gen Z when entering the digital realm and accessing digital media.



Unsurprisingly, smartphones are the most frequently used digital devices by our Gen Z respondents. On the other hand, they rarely use traditional media like printed media and radio.

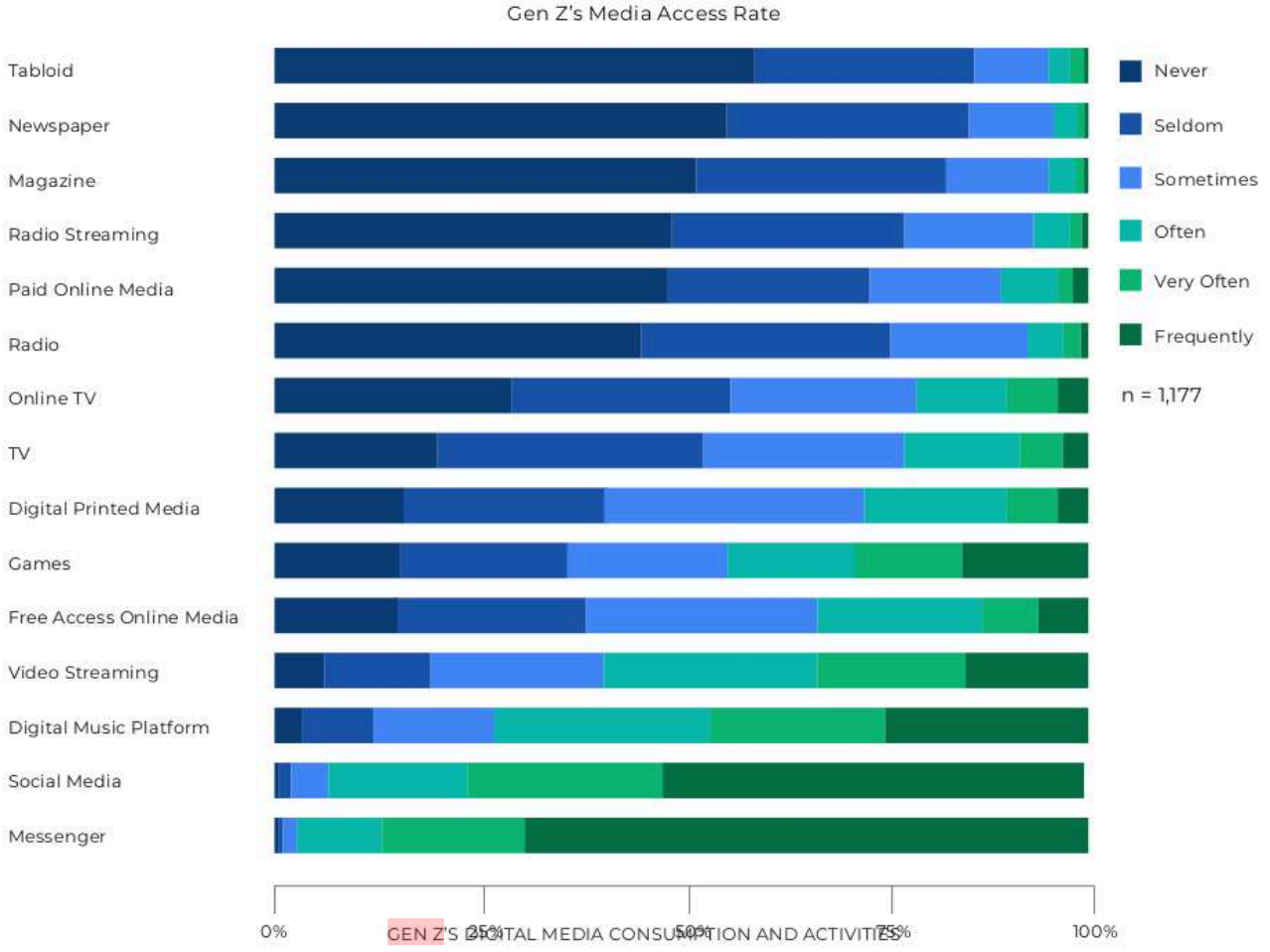
"My night routine always ends with me charging my smartphone or else, my morning would be ruined. The next day, I woke up, automatically grabbed my phone. I check the clock, my WhatsApp, and that's my morning routine."

Indah Suci, Student (23)

Gen Z Media Access

Data suggests Gen Z are gradually leaving traditional media such as tabloids, magazines, or newspapers. They prefer to consume digital media, which makes messenger apps, social media, and audio streaming services into the top three of the most accessed media by Gen Z.

The main highlight is that more than 50% of Gen Z barely access tabloids, newspapers, and magazines, which shows a grim picture of printed media industries. However, it's worth noting that one-third of them often access printed media in digital format. This shows that Gen Z, to some extent, are interested in the digital version of printed media like e-papers. "Those trends (of digital media usage) might be related to the fact that Gen Z use smartphones for most of their activities," said UMN's researcher, Rossalyn Asmarantika.

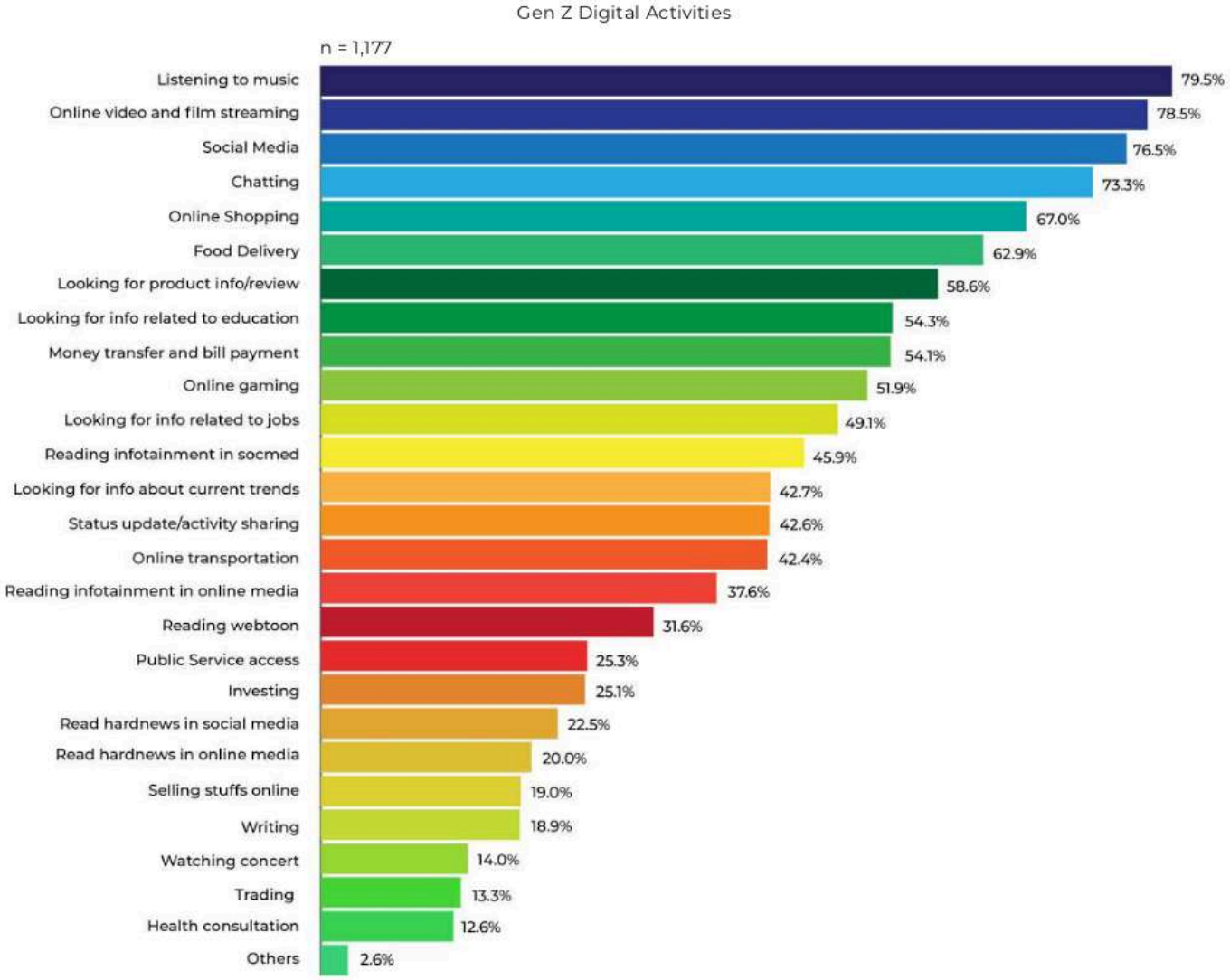


Gen Z Digital Activities

As digital natives, it's natural for Gen Z to spend most of their time digitally. Growing up in the middle of digital advancement, they never experienced a moment when the internet did not exist. This familiarity will then translate into drastic digital consumption and habits compared to the previous generations, such as Millennials and Baby Boomers (Hoefel et al., 2018).

Looking at the graphic below, it is evident that listening to music (79.5%), watching videos online (78.5%), and using social media (76.5%) are Gen Z's top activities in the digital realm. Those activities are related to Gen Z's purpose of seeking entertainment.

Interestingly, reading is not their main activity to do digitally. Every action related to reading is outside the Top 10 of Gen Z's favorite activities in the digital realm. In terms of searching for information, Gen Z prioritize education and work-related information.



Those activities, arguably, shape Gen Z's customs. Previous research shows, Gen Z has pioneered the rise of visual culture based on their top digital activities. It can be seen from how Gen Z combine stress-reliever and entertainment-related activities with study-related activities such as looking for information (Mahesh et al., 2021).

"Majority of Gen Z are students. Their contribution to the rise of visual culture correlates with their need for de-stressing. They're fed up with reading academic content for schools, especially with online learning. Study Life Balance is important for them, and entertainment-related activities serve as their stress reliever," said UMN Consulting's researcher, Albertus Prestianta.

"My main digital activity deals with looking for references as I am currently trying to finish my thesis. However, normally, I would just use my smartphones and laptop for entertainment. I love a good laugh. I will lose my mind if I just work all the time."

Indah Suci, Student, (23).

Gen Z's Top Digital Activities Based on Age and Gender

As a digital generation aged 12 to 26 years old, Gen Z's various digital activities most likely deal with what they consider essential for their development (Cole et al., 2015). Gen Z are currently in the middle of transitioning from adolescence into adulthood where significant changes might happen to them.

Survey says that Gen Z between 15 to 17 years old mostly use their digital devices to listen to music and access social media. Meanwhile, the older age group, 18 to 22 years old, prefer online shopping, listening to music, and watching online videos. Last but not least, the most senior group, 23 to 25 years old, use their digital devices for communication purposes and online shopping.

"It's interesting to see that Gen Z aged 18 to 22 years old have the highest score for each activity. This may deal with the fact that most of our respondents are from that age group. The National Statistics Office also says the majority

	15-17 y.o.	18-22 y.o.	23-25 y.o.	Male	Female
Listening to Music	29.30%	40.20%	30.60%	41.10%	58.90%
Watching Online Videos	27.90%	39.60%	32.50%	41.60%	58.40%
Socializing in Socmed	29.20%	39.10%	31.70%	39.60%	60.40%
Chatting	27.60%	38.80%	33.60%	39.00%	61.00%
Online Shopping	25.50%	41.30%	33.20%	35.50%	64.50%

of Indonesian Gen Z come from that age group. That group consists of fresh graduates and first jobbers," explained Rossalyn Asmarantika, UMN's researcher.

Despite growing up with digital technologies on their lap, Gen Z tend to be cautious about how they spend their time digitally. It's part of Gen Z's way to have a balanced life (YPulse, 2021).

"Due to pandemic and technological advancement in general, of course, I'm always on my phone. I think the majority of us would agree with me since we heavily communicate with others through our phones—be it from social media or messaging apps. However, for the sake of my sanity, I often use social media to find entertainment. I can't work all the time, I'll go crazy!"

Dinda Zavira, Fresh Graduate (22).

Gen Z's Top Digital Activities Based on Region

Looking at the graphic below, it is evident that most of the digital activities take place in Greater Jakarta. Compared to the other regions, the average percentage of the top five digital activities in Greater Jakarta is more than 39% percent, strengthening the argument that the digital divide is still happening in Indonesia.

For example, regarding the "listening to music" activity, 936 from 1177 respondents chose it during the research. If we break down the number, 39.30% from Greater Jakarta, 22.30% from Java, 19.20% from Sumatra, 5% from Sulawesi, 5.30% from Kalimantan, 5.10% from Bali-Nusa Tenggara, and 3.60% from Papua.

In short, although it is clear that the accelerated adoption of internet-enabled services in Indonesia has helped every generation to do digital activities, there is still a lot to be done. The World Bank, in 2021 stated that the Indonesian government needs to boost digital connectivity and universalize access to a high-quality internet connection for greater digital inclusion.

n = 1,177		Jabodetabek	Java	Sumatera	Sulawesi	Kalimantan	Bali and Nusa Tenggara	Maluku and Papua
Listening to Music	79.5% N: 936	39.30%	22.30%	19.20%	5.00%	5.30%	5.10%	3.60%
Watching Online Videos	78.5% N: 924	39.30%	22.90%	19.80%	5.20%	5.60%	4.10%	3.00%
Socializing in Socmed	76.5% N: 900	39.00%	22.20%	19.90%	5.10%	5.40%	5.70%	2.70%
Chatting	73.3% N: 863	38.40%	22.60%	19.40%	4.80%	6.00%	5.40%	3.50%
Online Shopping	67.0% N: 789	40.90%	21.50%	20.30%	5.10%	4.80%	5.20%	2.20%

“Majority of Gen Z are students. Their contribution to the rise of visual culture correlates with their need for de-stressing. They’re fed up with reading academic content for schools, especially with online learning. Study Life Balance is important for them, and entertainment-related activities serve as their stress reliever,”

Albertus Prestianta

UMN Consulting’s researcher

Time Spent by Gen Z in The Digital Realm

The digital realm is like a second home for Gen Z. As a proof, 18.2% of Indonesian Gen Z spend more than eight hours per day in that world.

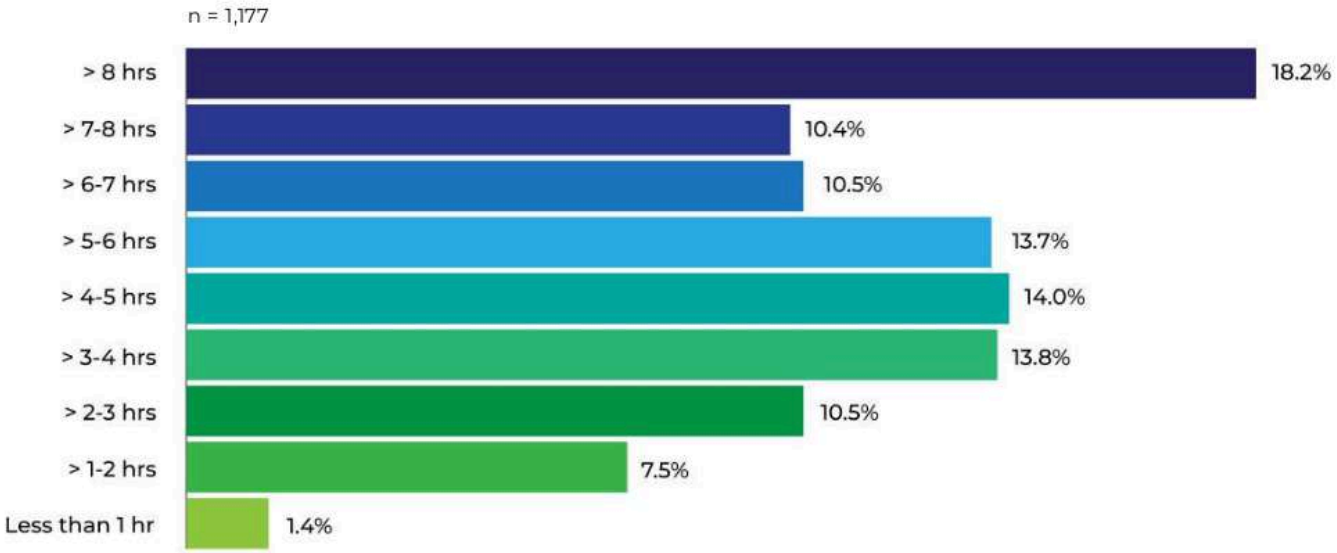
If we break down that finding based on Gen Z age group, 52.9% of them aged 18 to 22 years old, 35.3% Gen Z aged 23-25 years old, and 11.8% aged 15-17 years old. There's a likelihood that the current pandemic situation and online learning serve as the driving factor for the high duration Gen Z spend in the digital realm.

Gen Z aged 18 to 22 years old spend their time digitally due to an objective factor. They access digital information to find references for academic activities and social interaction (Mahesh et al., 2021). Social interaction is a basic need that cannot be diminished easily.[18] With the rise of the COVID-19 pandemic, which leads to many physical restrictions or social distancing, digital devices are the only way to stay in touch.

"With the current pandemic, long-distance communication has become extremely important. On a daily basis, I spend around 7 to 9 hours digitally doing university and work-related tasks."

Rivanno Vedana, Student (21)

Time Spent by Gen Z in The Digital Realm



Digital Content Needed by Gen Z

When all of those digital habits and activities are combined, it all comes down to the big question: What type of content does Gen Z need? As the inhabitants of the digital realm, giving in to what Gen Z like and need will boost the chance of getting their attention and engagement (Bleau-Bashorun, 2021).

According to that finding, the educational cointent they are interested in can be divided into three categories that educational content is what they need the most. Based on their answers, we're able to define the educational content they are interested in into three categories:

- **Educational content related to teaching and learning activities at school or campus (exam questions, lessons, courses, and others)**
- **Applicable educational content like entrepreneurship or business education for students.**
- **Educational content about tips and strategies to get scholarships, study abroad, life abroad, etc.**

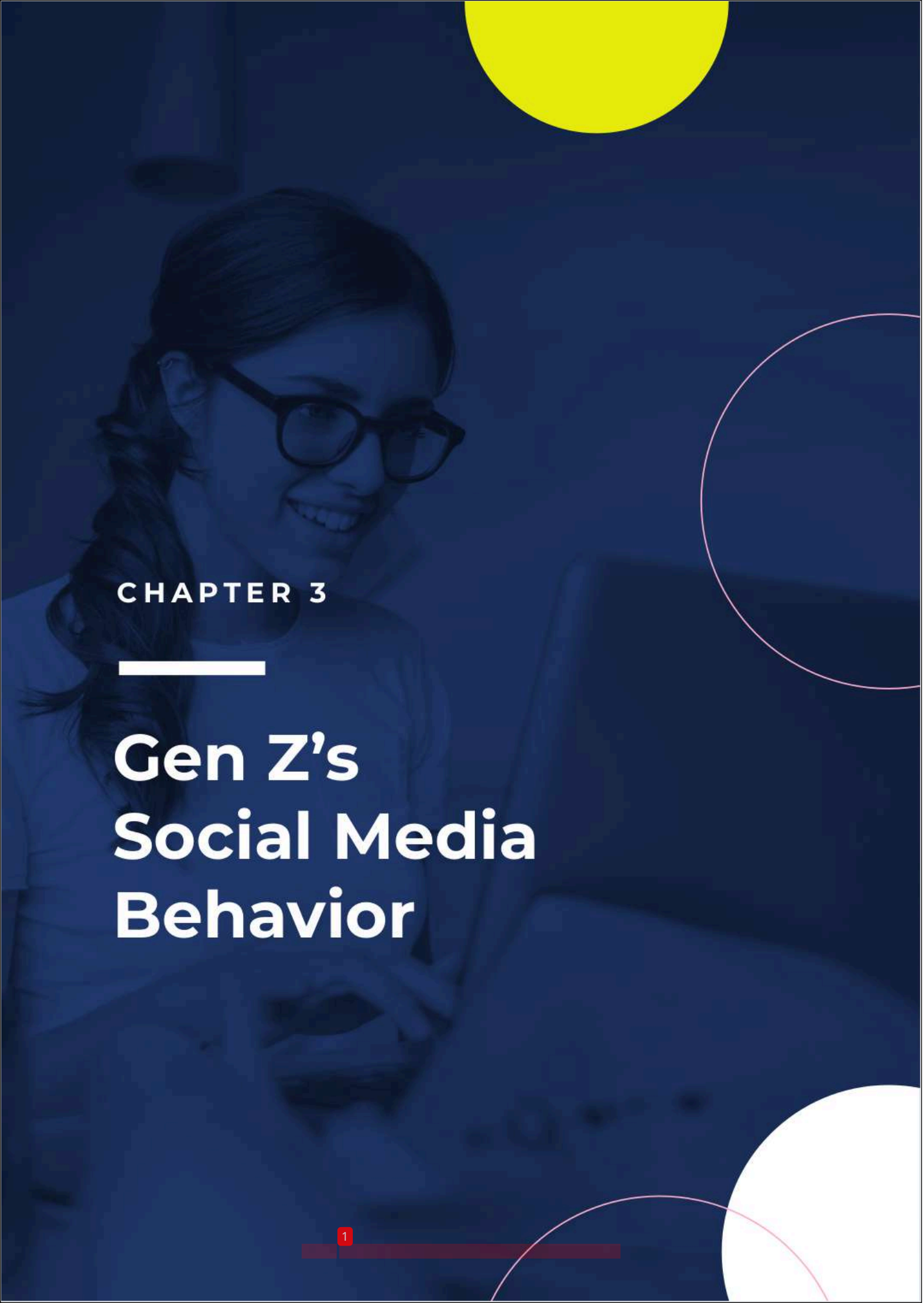
Gen Z's need for educational content and how (or through who) they can be delivered will be explained further in the following chapters, especially in Gen Z's interpretation of influencers and social media usage.

“Informative, comprehensive, and content than can answer my curiosity. That’s basically what I look for when searching for the content that I need. The content needs to be packed with good writings technique, able to motivate me, and interesting enough so I won’t get bored. Since I’m a visual person, content with graphics on it wins my heart. It’s all about the packaging and what it tries to tell us.”

Leoni Alvionita, student (22)

“I’d love nothing more than an educative, informative, and not long-winded content to fulfill my needs.”

Rivanno Vedana, student (21)



CHAPTER 3

Gen Z's Social Media Behavior

As digital natives, most Gen Z have been familiar with social media for more than half of their lives. In fact, Gen Z were born during the emergence of the world's first social networking site, Six Degrees, in 1997 (Ngak, 2011). With that in mind, It's not surprising that they have a higher social media presence than other generations.

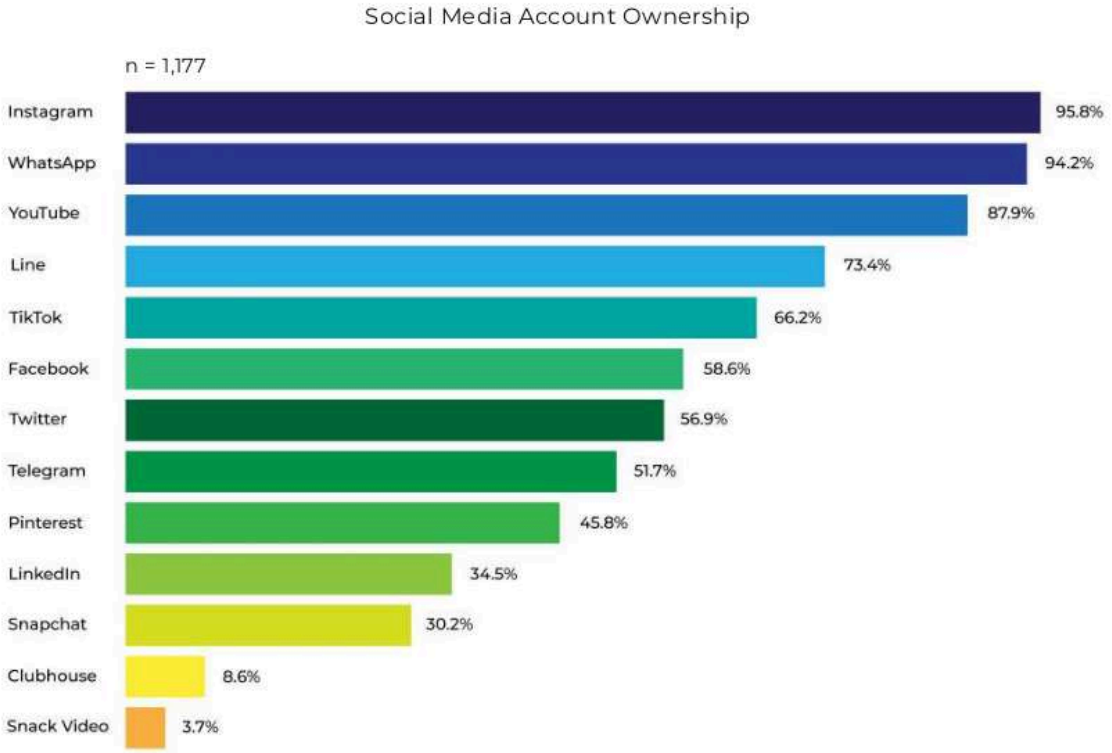
Over time, social media has become Gen Z's main playground in the digital realm. The reduced intensity of physical interaction during the COVID-19 pandemic has also made social media an alternative way to stay connected to the world (Pramiyanti et al., 2020). Several brands and content providers have used that opportunity to approach Gen Z consumers effectively and digitally.

According to a survey conducted by YPulse (2021), YouTube, Instagram, and TikTok dominate Gen Z's social media usage in the United States and Canada. Although identical, there are several differences regarding the most accessed social media by Indonesian Gen Z and their goals in accessing them.

Gen Z's Social Media Account Ownership

Due to the popularity of social media, new types of platforms emerge almost every year. However, the most popular ones are still the old players.

Data shows that nearly all Gen Z own Instagram (95.8%) and WhatsApp (94.2%). Both are fostered by an American company, Meta (formerly Facebook). In addition, Gen Z also contribute a massive presence on YouTube (87.9%), Line (73.4%), and TikTok (66.2%).



It's worth mentioning that even though TikTok stands in the fifth position, it has much faster growth than Instagram and YouTube. It only took four years for the app to get one billion monthly users, twice the speed of Instagram and YouTube which took approximately eight years (Dellatto, 2021). This is arguably due to the rise of public demand for entertainment and short-form video content.

Those findings also show that vertical video content has become more popular. It can be seen from how Instagram, Youtube, and TikTok have embraced vertical video content and adapted their platform to support it (Bhanushalim 2021). Now, their users can easily create, distribute, and consume vertical video content.

Gen Z's growing interest in vertical and short video content is due to the desire to escape daily fatigue. At a relatively young age, most Gen Z are currently pursuing education, both at the middle school and university level. The boredom from learning activities encourages them to consume vertical and short videos for de-stressing (YPulse, 2021).

Vertical video is also more convenient as it maximizes the smartphone's vertical dimension and 9:16 aspect ratio (Bhanushali, 2021). In other words, with vertical video, they don't have to flip their phone. When time is essential in capturing Gen Z's attention, every second is important, even if it's just to flip a phone's screen.

"Vertical short-videos are in demand because of their convenience. Gen Z no longer need to read like they do in school or college. They just need to watch it and that's all," said UMN Consulting's researcher Albertus Prestianta.

Gen Z's Social Media Account Ownership Based on Age and Gender

Looking at the chart, it is evident that the majority of social media users come from the 18-22 years old age group. The average percentage of social media ownership by that "middle" group is around 40%. For example, of 1127 Indonesian Gen Z (from 1177) who chose Instagram during the research, 39.6% aged 18-22 years old.

What should be highlighted from the chart is the ownership of a LinkedIn account. With 406 Indonesian Gen Z who chose it during the research, LinkedIn is not among the top five most owned social media accounts by Gen Z. It is even barely in the top ten. However, if we break down the number, there is a distinct gap between the youngest, the middle, and the oldest age group.

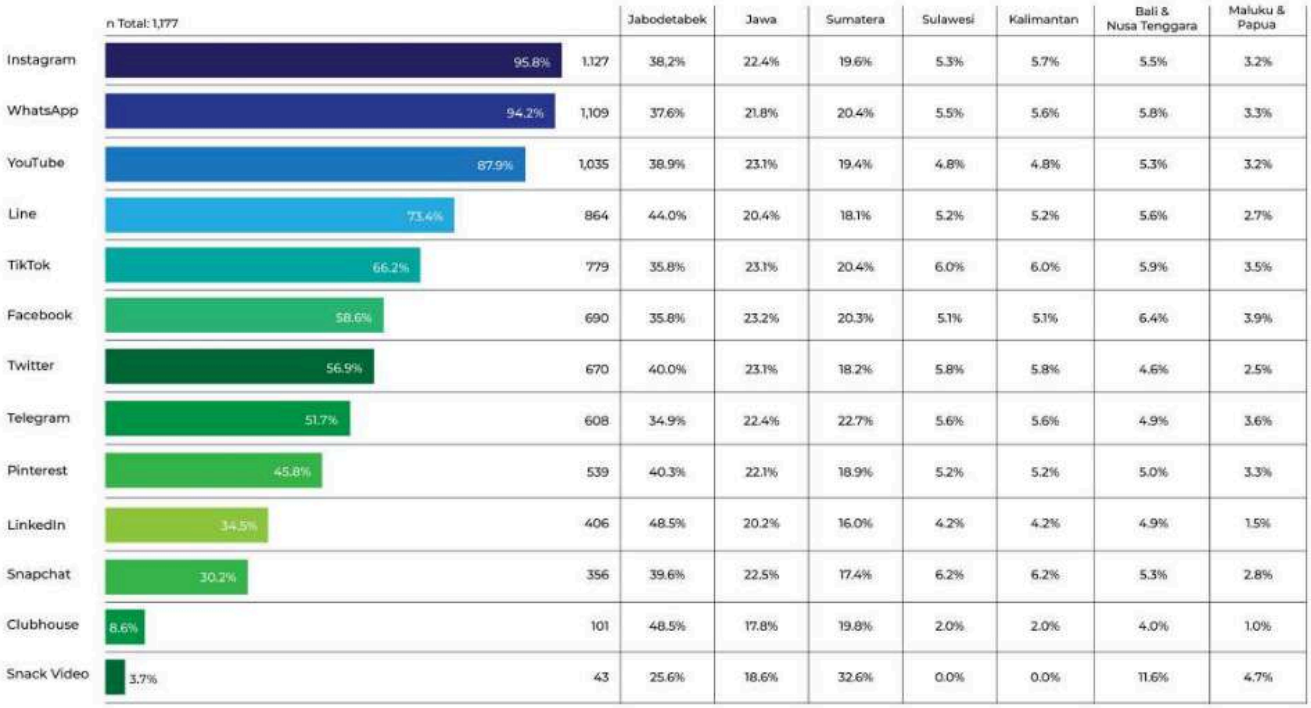
Most LinkedIn users are 18-22 years old (46.6%) and 23-25 (49%) years old based on our survey. In other words, only 4.4% from the 15-17 age group. The big difference between the younger and older age group, arguably, is caused by the platform's focus on career-related information, which is more needed by the older Gen Z (Sakdiyakorn et al., 2021).

A similar case can be seen on Clubhouse, where 50.5% of its users aged 23-25 years old. During its release period, up-and-coming entrepreneurs often used Clubhouse to expand their professional network by holding business and career-related discussions (McCoy, 2021). In short, those percentage differences further show that Gen Z use social media in accordance with their interests and needs (Prakash Yadav and Rai, 2017).

"I didn't use LinkedIn until I was 19 years old, because there wasn't a need to use it yet. At that time, I was using LinkedIn to find information about internships."

Alfania Glory (21)

Gen Z's Social Media Account Ownership Based on Their Region



n Total: 1,177		Jabodetabek	Jawa	Sumatera	Sulawesi	Kalimantan	Bali & Nusa Tenggara	Maluku & Papua
Instagram	1,127	38.2%	22.4%	19.6%	5.3%	5.7%	5.5%	3.2%
WhatsApp	1,109	37.6%	21.8%	20.4%	5.5%	5.6%	5.8%	3.3%
YouTube	1,035	38.9%	23.1%	19.4%	4.8%	4.8%	5.3%	3.2%
Line	864	44.0%	20.4%	18.1%	5.2%	5.2%	5.6%	2.7%
TikTok	779	35.8%	23.1%	20.4%	6.0%	6.0%	5.9%	3.5%
Facebook	690	35.8%	23.2%	20.3%	5.1%	5.1%	6.4%	3.9%
Twitter	670	40.0%	23.1%	18.2%	5.8%	5.8%	4.6%	2.5%
Telegram	608	34.9%	22.4%	22.7%	5.6%	5.6%	4.9%	3.6%
Pinterest	539	40.3%	22.1%	18.9%	5.2%	5.2%	5.0%	3.3%
LinkedIn	406	48.5%	20.2%	16.0%	4.2%	4.2%	4.9%	1.5%
Snapchat	356	39.6%	22.5%	17.4%	6.2%	6.2%	5.3%	2.8%
Clubhouse	101	48.5%	17.8%	19.8%	2.0%	2.0%	4.0%	1.0%
Snack Video	43	25.6%	18.6%	32.6%	0.0%	0.0%	11.6%	4.7%

Using previous data regarding digital activities as a reference, it is obvious that Gen Z's social media account ownership will also be concentrated in Greater Jakarta compared to other regions. Arguably, this is caused by the higher adoption of internet-enabled services and the higher quality of internet connection in the capital area, where the flow of information and digital activities tends to be busier (Mulyana, 2021; World Bank, 2021).

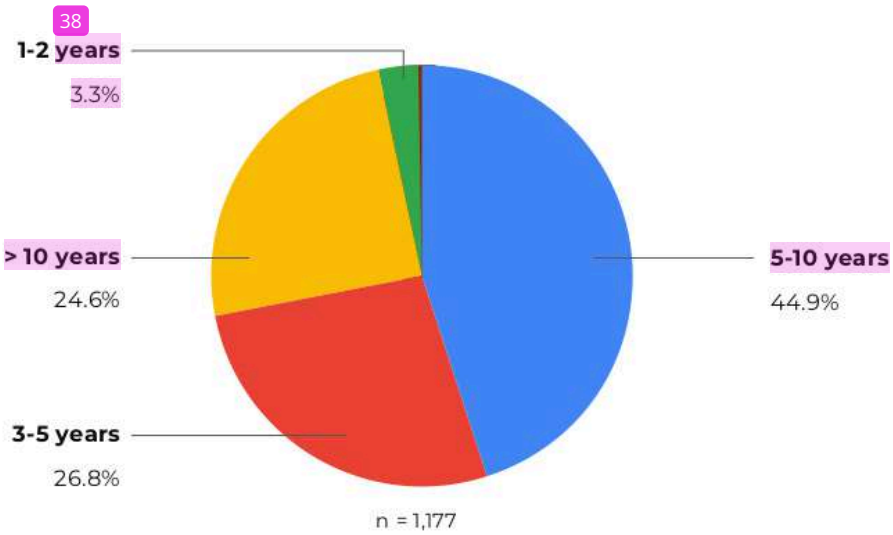
For example, of 1127 Gen Z who chose Instagram during the research, 38.2% from Jakarta and 22.4% from Java. In other words, more than 50% of Gen Z who use Instagram are based on Java Island, the "center" of Indonesia. Similar cases can be seen regarding Whatsapp, Youtube, Line, TikTok, and many more.

The most interesting finding in this part is Snack Video's number. Even though it sits at the bottom of the chart, it shows higher usage in Sumatera compared to Greater Jakarta. Of 43 Gen Z who chose it during the research, 32.6% from Sumatera and 25.6% from Greater Jakarta.

With its small number, it's hard to read the meaning behind Snack Video's higher ownership by Gen Z outside Greater Jakarta. However, it's worth considering that Snack Video is known for its monetization features. The difficult economic conditions caused by the pandemic could be the motivation behind its high ownership.

Duration of Social Media Account Ownership by Gen Z

As digital natives, Gen Z don't take long to adapt to the digital world and adopt social media. Data shows that 44.9% of Gen Z have had a social media account for 5-10 years. This fact indicates that Gen Z, who are now aged 12-26 years old, have been actively using social media even before they reached their adolescence (10-19 years old).



Duration of Social Media Account Ownership Based on Gen Z's Age and Gender

Based on age and gender data, it's apparent that the adoption of social media by Gen Z started when they were reaching adolescence.

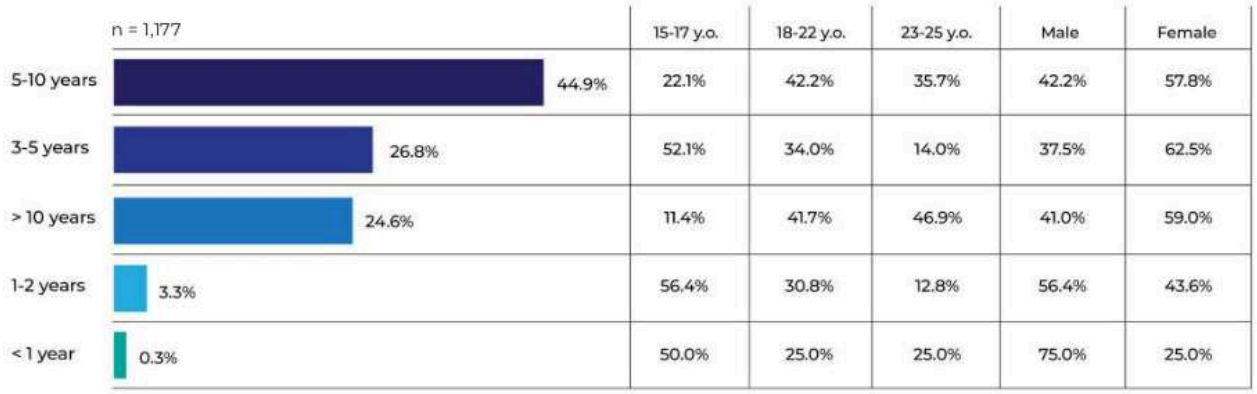
As previously mentioned, the majority (44.9%) of our Gen Z have had social media accounts for 5-10 years. When we broke down that number based on age group, 22.1% of them aged 15-17 years old, 42.2% aged 18-22 years old, and 35.7% aged 23-25 years old. Simply by subtracting their age with the duration of social media accounts ownership, it is evident they started using social media when they entered adolescence or junior high school.
It's worth mentioning that in the chart, the shorter (1-5 years) the duration of social media accounts ownership, the bigger the percentage of the youngest age group (15-17 years old). Furthermore, the longer (>10 years) the duration of the ownership, the bigger the percentage of the oldest age group (23-25 years old).

There is nothing more to read from those findings besides Gen Z being introduced to social media when they were young. Gaining insights from Gen Z's first-ever experience with social media, Facebook was among the first to gain popularity among them.

"The first social media I had was Facebook, when I was in middle school. My goal to create a Facebook account were to find friends to chat with, join communities, and make new acquaintances."

Richard Marx, Student (21)

Duration of Social Media Account Ownership Based on Gen Z's Age and Gender



	15-17 y.o.	18-22 y.o.	23-25 y.o.	Male	Female
5-10 years	22.1%	42.2%	35.7%	42.2%	57.8%
3-5 years	52.1%	34.0%	14.0%	37.5%	62.5%
> 10 years	11.4%	41.7%	46.9%	41.0%	59.0%
1-2 years	56.4%	30.8%	12.8%	56.4%	43.6%
< 1 year	50.0%	25.0%	25.0%	75.0%	25.0%

Duration of Social Media Ownership Based on Gen Z's Region

Consistent with previous findings that show social media accounts ownership by Gen Z is concentrated in Greater Jakarta, the highest duration for social media ownership also takes place in that region.

As previously mentioned, the majority (44.9%) of Indonesian Gen Z have had social media accounts for 5-10 years. Breaking down the numbers based on region, 38.8% of Indonesian Gen Z are from Greater Jakarta, 22.1% from Java, and 20% from Sumatra.

The argument remains that the uneven numbers among regions are caused by the uneven development of information technology infrastructure (Mulyana, 2021; World Bank, 2021). The higher quality of internet connection in Greater Jakarta and Java allows Gen Z in that area to adopt social media quicker and longer than in other regions. Based on the latest data from the Indonesian Internet Service Providers Association, 56.4% of the total 73.3% of internet users in Indonesia are from Java Island.

Interestingly, the chart shows that the percentage of Sumatra, Sulawesi, Kalimantan, and Maluku-Papua is growing bigger the shorter the duration of social media ownership. It indicates an attempt from the government to even out the digital infrastructure development across Indonesia. If it's consistent, the duration of social media ownership by Gen Z outside Java Island could grow bigger in the coming years.

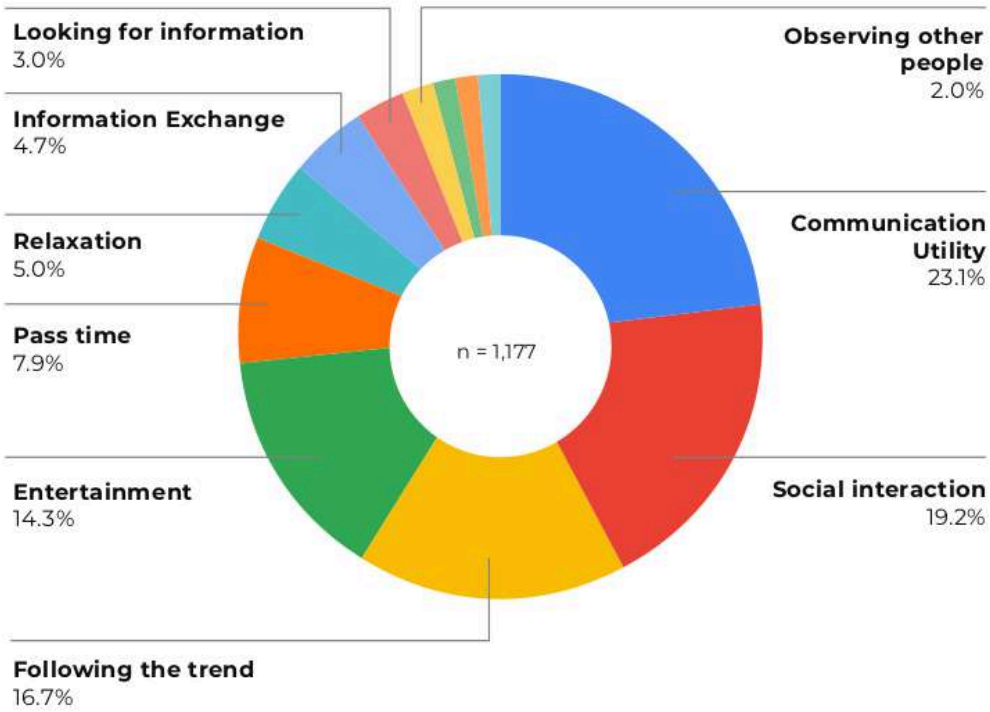
Duration of Social Media Ownership Based on Gen Z's Region

n Total: 1.177	Jabodetabek	Jawa	Sumatera	Sulawesi	Kalimantan	Bali & Nusa Tenggara	Maluku & Papua
5-10 years 44.9%	38.8%	22.1%	20.0%	5.7%	5.9%	5.1%	2.5%
3-5 years 26.8%	30.8%	23.5%	24.4%	4.4%	6.3%	6.0%	4.4%
> 10 years 24.6%	43.1%	20.3%	15.9%	5.5%	5.9%	6.6%	2.8%
1-2 years 3.3%	33.3%	15.4%	23.1%	7.7%	7.7%	2.6%	10.3%
< 1 year 0.3%	25.0%	0.0%	50.0%	0.0%	0.0%	25.0%	0.0%

Gen Z's Initial Goals of Creating Social Media Account

Based on our survey, Gen Z's top 3 initial goals of creating social media accounts are for communication channel (23.1%), social interaction (19.2%), and following the latest trends (16.7%). They communicate on social media out of a desire to talk things over with others and stay relevant to the latest topics. Meanwhile, social interaction is usually done by joining specific communities, reuniting with friends, and participating in online events.

Those findings show that Gen Z used social media initially to communicate and interact with other people. Referring to Whiting & Williams (2013), the two goals are categorized as aspects of Social Interaction.

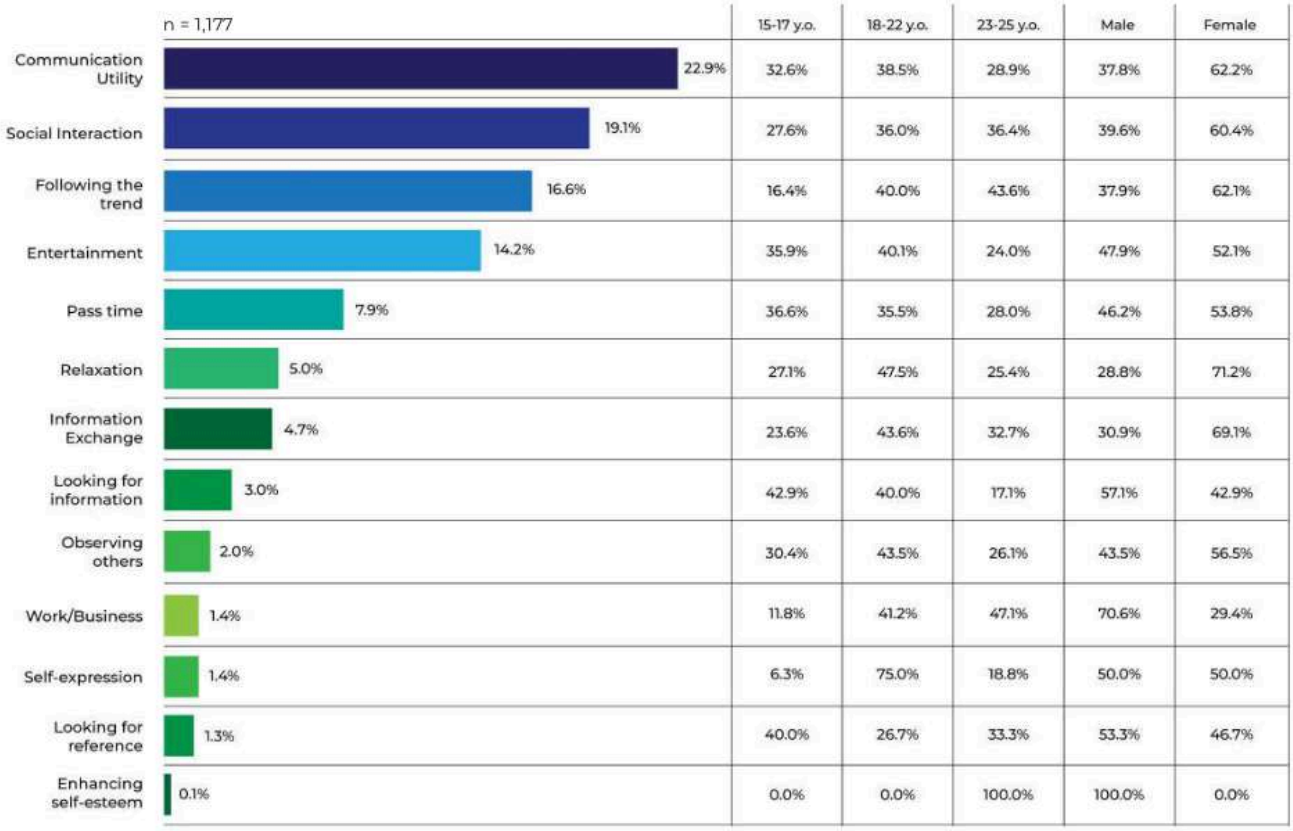


Gen Z's Initial Goals of Creating Social Media Account Based on Age and Gender

Taking age and gender into account, social media as a communication channel was chosen by 22.9% of the total 1177 Indonesian Gen Z. From that number, 32.6% of them aged 15-17 years old, 38.5% aged 18-22 years old, and 28.9% aged 23-25 years old.

Social interaction was chosen by 19.1% of Indonesian Gen Z with 27.6% of them aged 15-17 years old, 36% aged 18-22 years old, and 36.4% aged 23-25 years old. Apart from that, the purpose for Following the latest trends was chosen by 16.6% of Indonesian Gen Z with 16.4% of them aged 15-17 years old, 40% aged 18-22 years old, and 43.6% aged 23-25 years old.

Based on the age distribution, the purpose for communication channel was mainly chosen by the younger and middle age groups during the research. Meanwhile, the purpose for social interaction and following trends were chosen mainly by the middle and older age groups. Those findings show that Gen Z tend not to use social media to follow trends at a young age. Besides that, they use social media more to find entertainment, fill their spare time, and look for academic references (Pramiyanti et al., 2020).



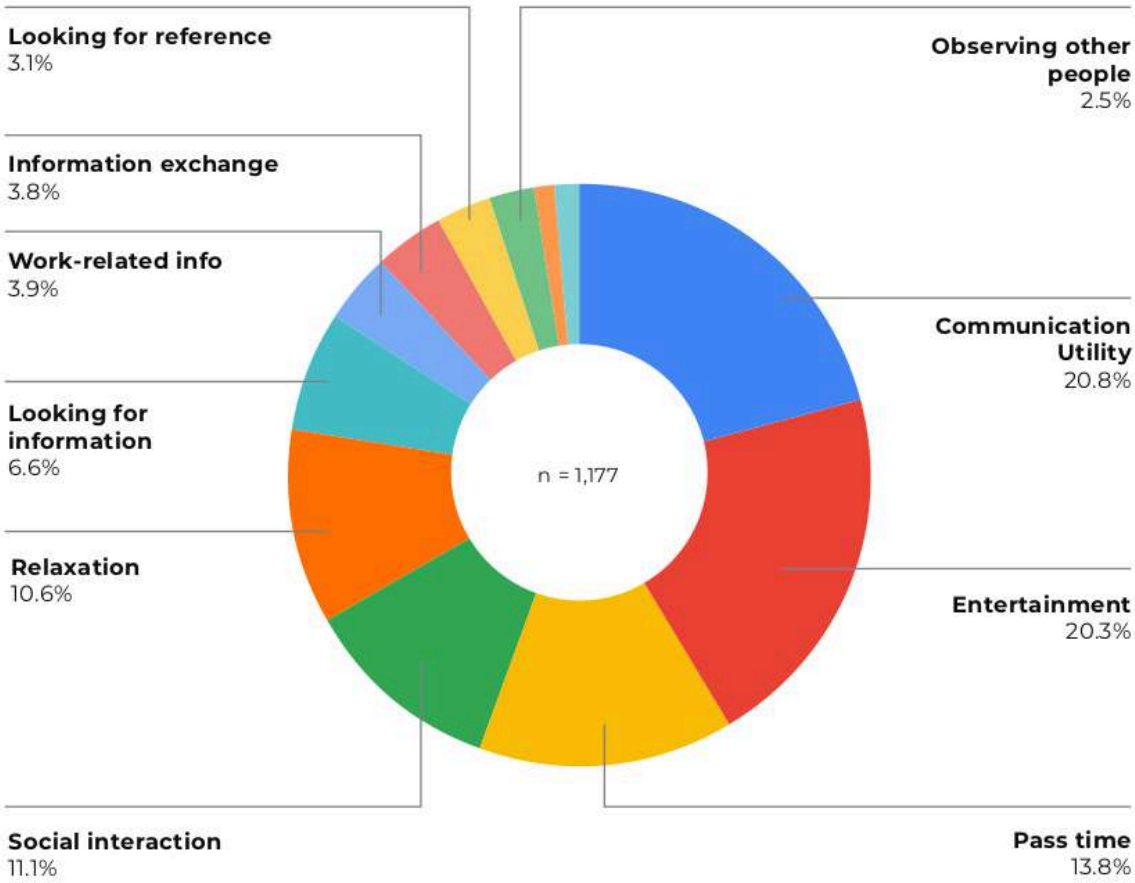
Gen Z's Dominant Activities on Social Media

As previously discussed, Gen Z's initial goals in creating social media accounts are for communication channels, social interaction, and following latest trends. However, these reasons don't last long. In fact, their dominant activities in social media today tell a different thing.

Although data shows communicating remains Gen Z top activity (20.8%), they are now more interested in using social media to find entertainment (20.3%) and fill their spare time (13.8%). Their second initial goal, namely to conduct social interaction, doesn't make it to the top 3 of their dominant activities in social media.

Arguably, this is due to increased free time and reduced social interaction during the pandemic (Pramiyanti et al., 2021). Gen Z prefer to spend their time watching entertaining content on social media. Apart from that, they also like to communicate and keep in touch with other people. Based on those findings, content providers should emphasize two-way interaction and entertaining content in approaching Gen Z.

"Gen Z are interested in entertaining and engaging content. Therefore, it is important to build two-way communication with them. This can be done by putting conversational sentences in visual and text-based content," said UMN's researcher Rossalyn Asmarantika about avoiding hard-selling content.

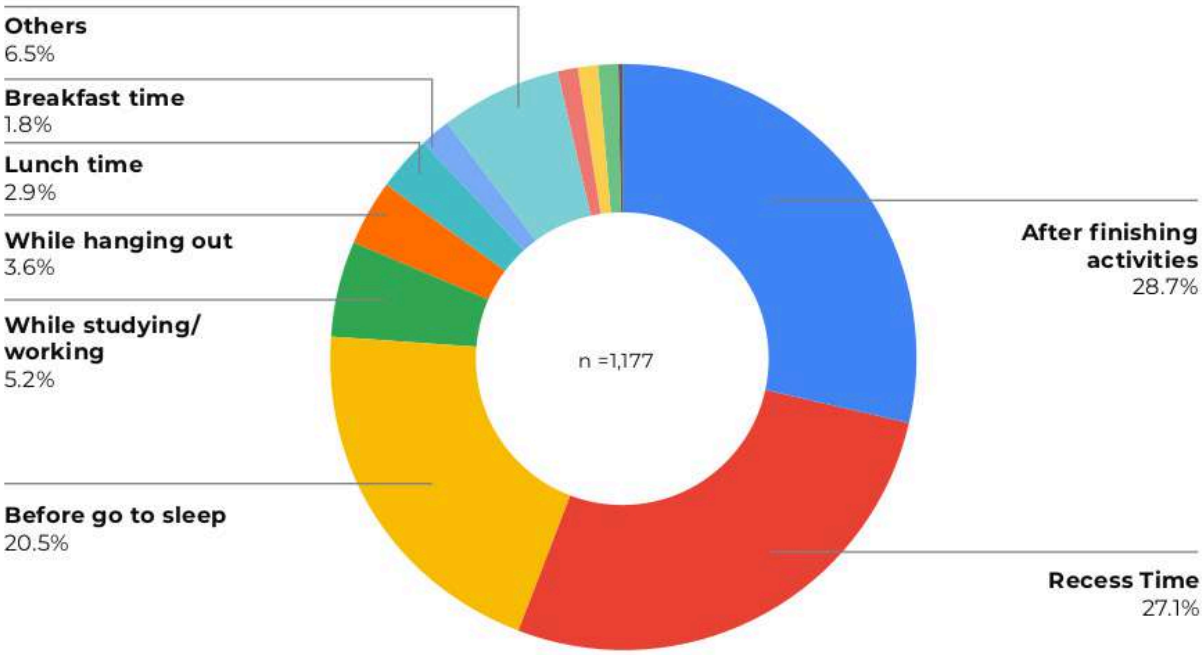


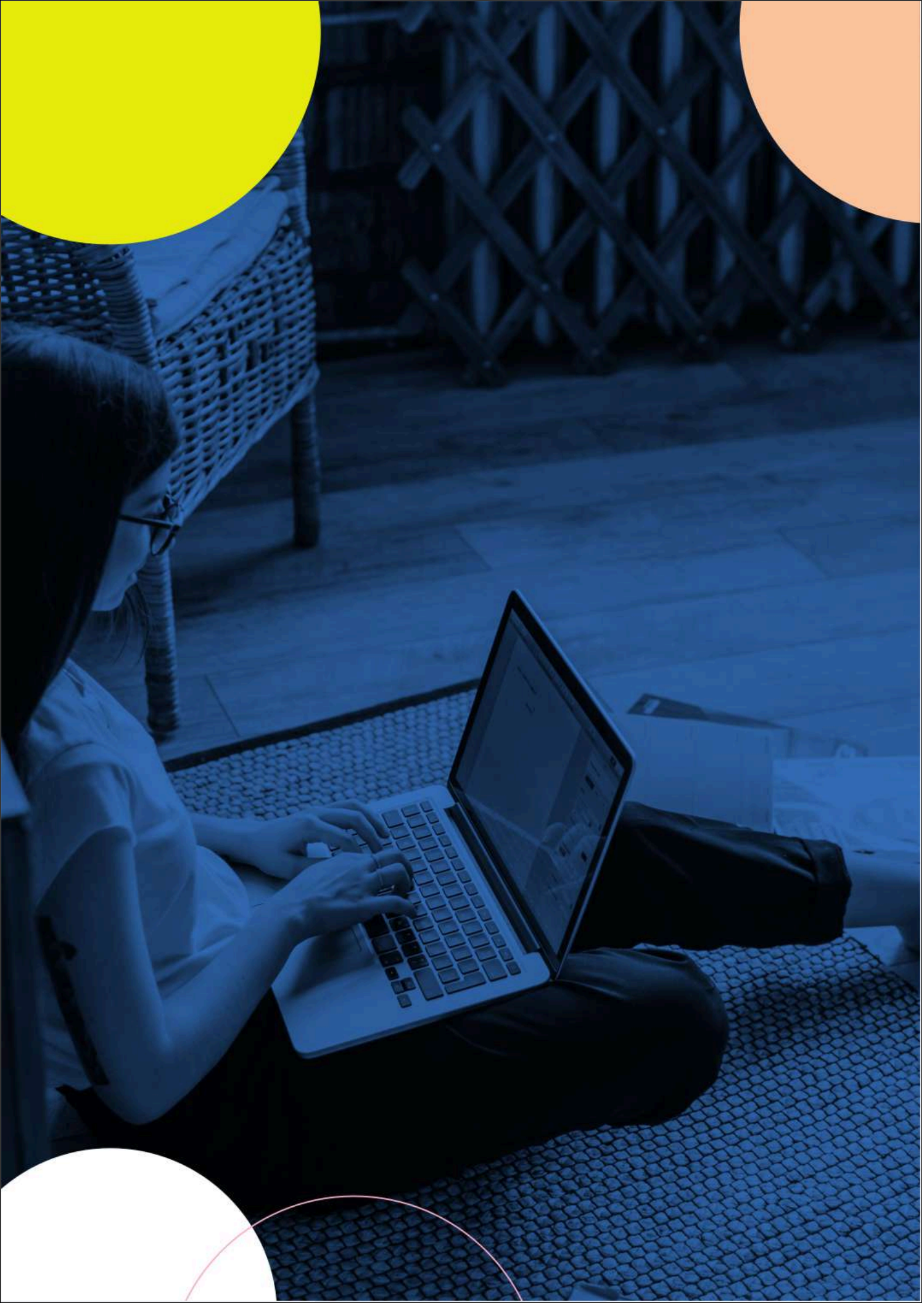
Gen Z's Favorite Time to Access Social Media

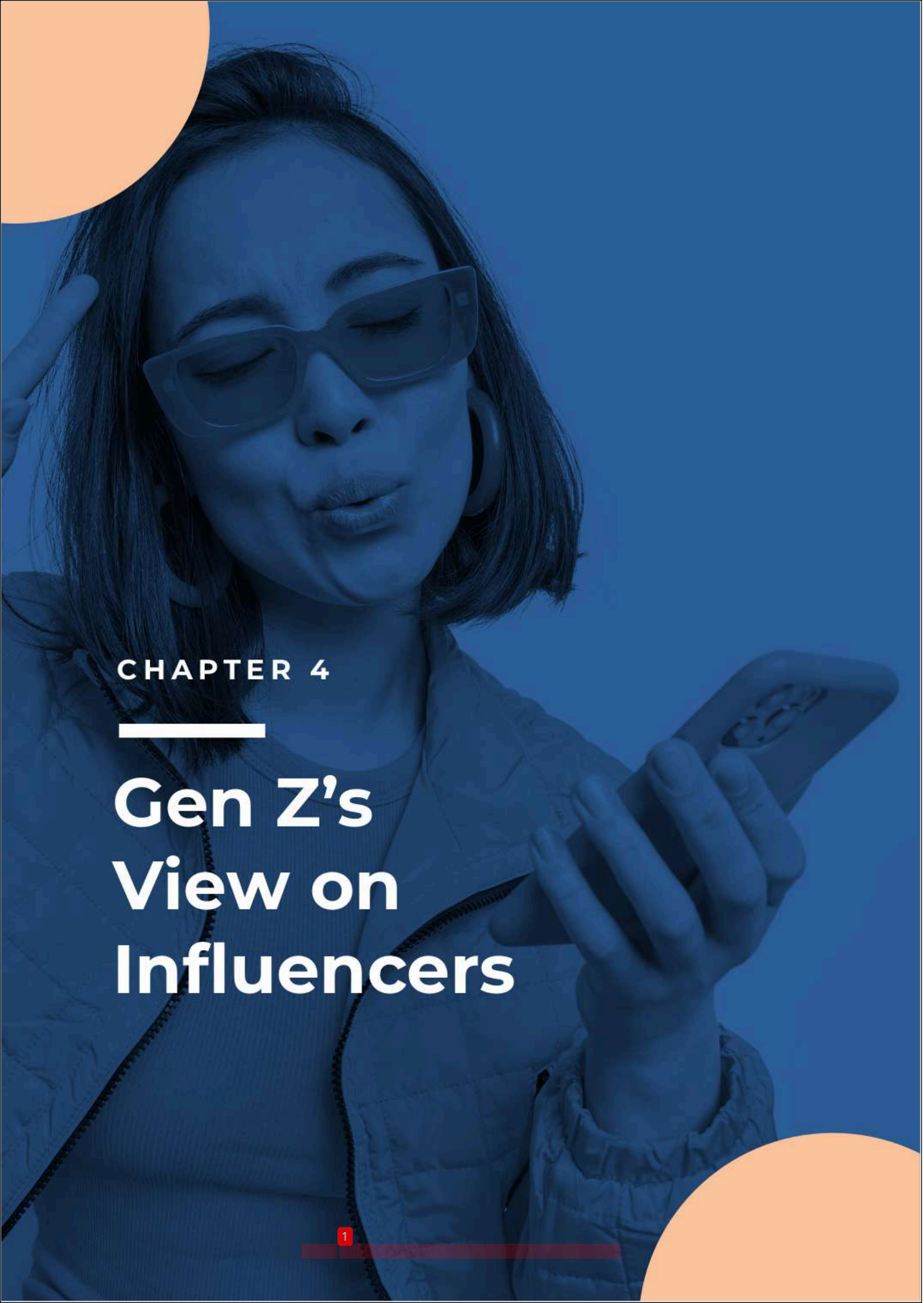
Despite the fact that they have a lot of spare time, Gen Z tend to be wise in allocating the time they spend on social media. For them, social media is no longer a new thing that entices them that much to abandon other pursuits (Prakashyadav and Rai, 2017). They are more likely to access social media in their spare time, such as when they are done with activities (28.7%), during breaks (27.1%), and before bed (20.5%).

"I never access social media outside of my free time because I understand my priorities. If I need it for work, such as analyzing trends, I will then open it at work."

Richard Marx, Student (21)







CHAPTER 4

Gen Z's View on Influencers

In Indonesia, using an influencer to market a product has become a trend. Several start-ups specializing in bridging brands with influencers even make huge profits because of that trend. Hiip, for example, managed to reap 65% more earnings than the previous year. SociaBuzz in 2020 also reported that the number of influencers registered with its company had increased three times.

Over time, brands continue to develop new approaches in influencer marketing. This is driven by a shift in consumer values and Gen Z's emergence as the primary target market. As reported by Hootsuite in 2022, people aged 16 to 24 follow influencers on social media the most than others. In addition, Indonesia is also listed as the fourth country with the most significant number of internet users who follow influencers.

Brands, agencies, and influencers need to realize that Gen Z are personal beings and different from previous generations. Using our previous research, *Gen Z's Lifestyle and Consumption Habits*, Gen Z prefer to follow influencers according to their niche or self-values. In addition, they also crave authenticity, reputation, and credibility. To put it short, brands, agencies, and influencers need to understand Gen Z first before approaching them.

The Definition of Influencers According to Gen Z

The majority of Indonesian Gen Z considered "Influential" as the main characteristic during the research. In other words, they define an Influencer as someone who influences other people. The other word they mentioned was "Promotional", which means Indonesian Gen Z define an Influencer as someone who is actively promoting something.

There was also an argument that a person must have a large number of followers on social media to be qualified as an influencer. This indicates that an influencer, in Gen Z's understanding, has a role in promotional media where their number of followers functions as social capital.

"In my opinion, influencers are people who perform persuasion in order to gain influence over their audience's point of view."

Raihan Janitra, Employee (24)

Gen Z's Top of Mind Influencers

Many new influencers appear every year as the trend of Influencer Marketing continues. However, not all of them manage to stay inside Gen Z's minds. The following are the top 10 influencers according to our research findings:

Arief Muhammad

Awkarin

Titan Tyra

Maudy Ayunda

Jerome Polin

Rachel Vennya

Raffi Ahmad

Fadil Jaidi

Raditya Dika

Edho Zell

If we look further, those names above have similar characteristics and content. For example, they all have a massive number of followers on social media, be it Instagram, Twitter, or YouTube. Furthermore, their content mainly contains entertainment or comedy, educational tips-and-trick, and daily vlogs. They are also actively displaying paid sponsorship on their social media accounts.

Arief Muhammad, for example, is well-known for his habit of building connections with his followers through a giveaway event called 'ikoy-ikoyan'. He first publicly appeared after being revealed as the owner of a popular Twitter account, @Poconggg.

"As far as I know, Arief Muhammad once wrote a horror-comedy book entitled Poconggg and Pocong. He also created a website www.nyunyu.com with Raditya Dika. The content that he shares are usually about everyday life.", said one of our respondents, Elisa Christiana (22).

UMN's researcher, Nona Evita, explained during the writing of this report that Arief Muhammad take a universal approach to build connections with his followers on social media. And, according to her, that approach helps him to stay down to earth and relatable to Gen Z, who is very critical about how Influencers should deliver their content.

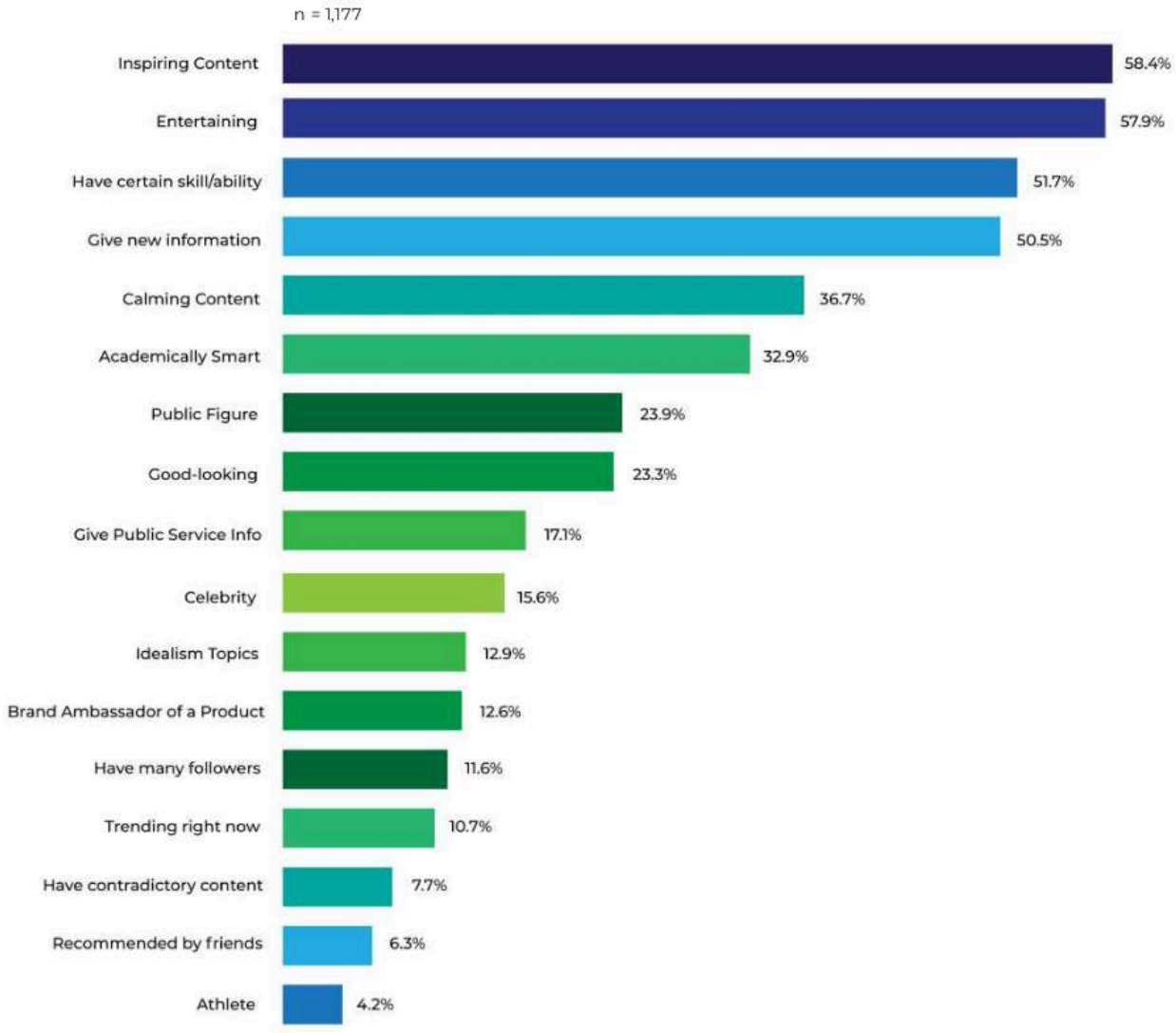
"He creates entertainment content that everyone can easily accept, so it doesn't insinuate or offend any party. Gen Z embrace this kind of universalism," she added.

Gen Z's Reasons of Following Influencers

Gen Z tend to select a figure who can give them specific values or benefits, and it is applied in choosing Influencers to follow too (Wiese and Kruger, 2016). Gen Z's top reasons for following influencers are inspiring content (58.4%) and humorous or entertaining quality (57.9%). Other than that, Gen Z also follow influencers who have specific skills or abilities (51.7%), impart new knowledge (50.5%), and have calming content (36.7%).

Surprisingly, in the chart, the quality of having many followers (11.6%) and being trending (10.7%) stand in the bottom five. That number further confirms that Gen Z are not easily carried away by trends or other people's preferences. In other words, having a high number of followers isn't the winning formula for targeting Gen Z because everything about them tends to be personal.

Using the data as reference, arguably Gen Z have grown into a wise generation amid rapid technological development and easy access to education. In choosing influencers, Gen Z require certain qualities such as authenticity and personality. "The closer an influencer is to Gen Z's values, the more they will imitate them," said UMN Consulting's researcher, Albertus Prestianta.



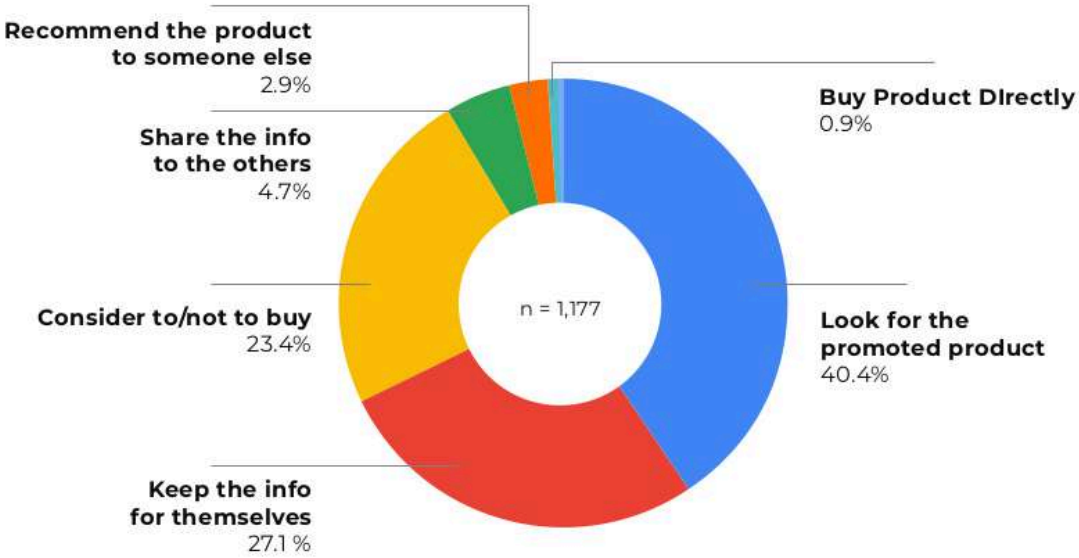
Gen Z's Reaction When Influencers Promote Products

Most Gen Z see an Influencer as someone who is heavily related to promotional activities. However, Gen Z are pretty careful in considering whether or not they will buy the promoted products. In fact, looking at the chart below, most of Gen Z tend to find out the advertised products first (40.4%) than purchase the products right away (0.9%).

Gen Z tend to be wise in spending their money; therefore they are known as smart buyers. They don't want to buy a product without finding its benefits and advantages (Desjardins, 2018). Based on our previous research, *Gen Z's Lifestyle and Consumption Habits*, product reviews are the type of information Gen Z most access on social media before purchasing a product.

"Gen Z are not easily influenced by the people around them when it comes to buying something. Therefore, they tend not to immediately buy a product just because the product is recommended or purchased by someone else. They buy something because they want and need it,"

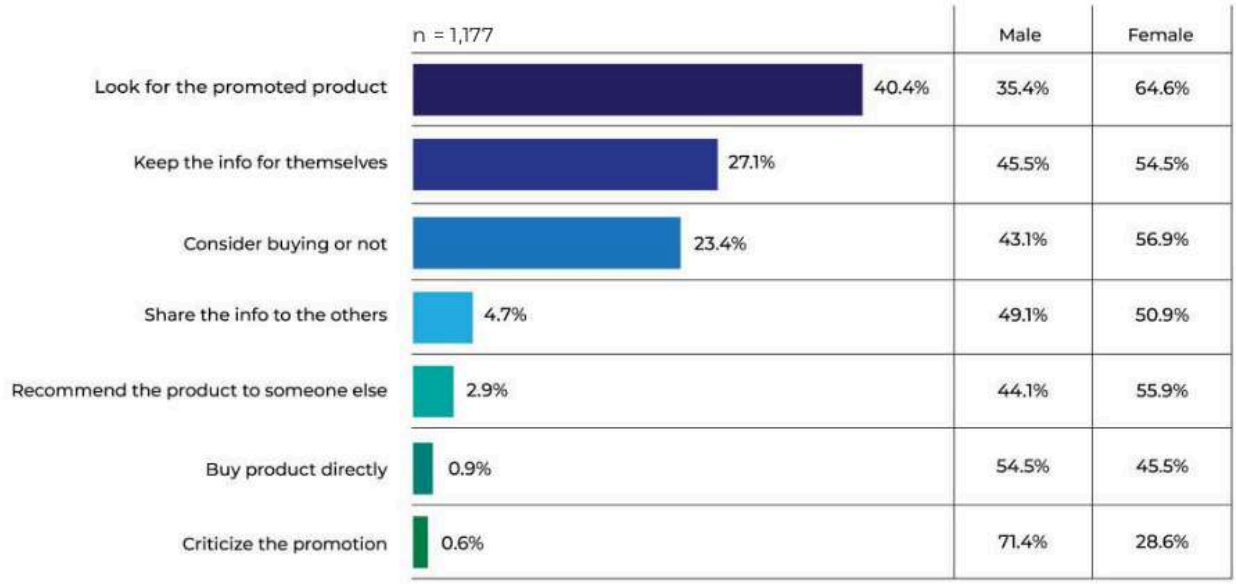
Nona Evita.



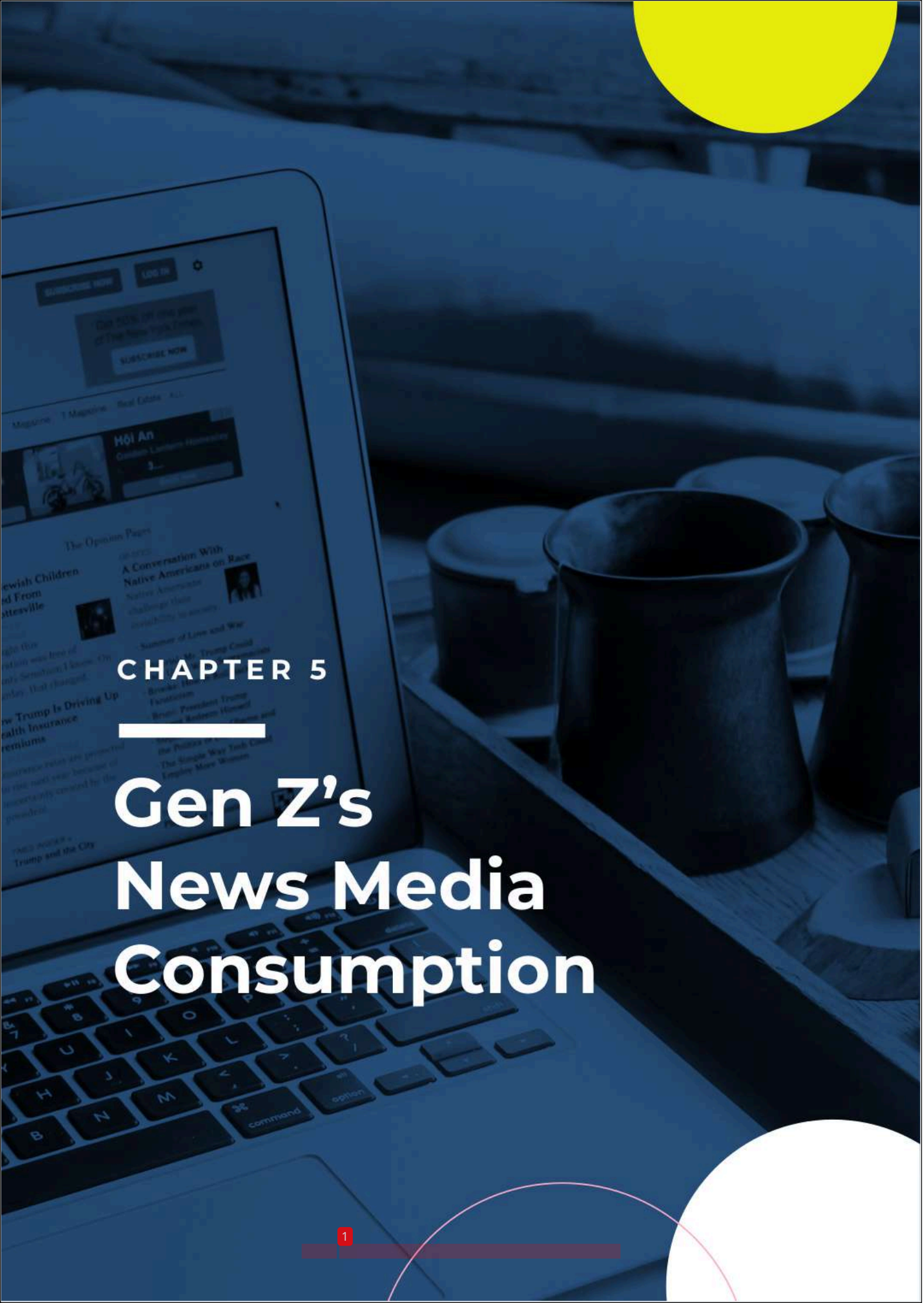
Gen Z's Reaction When An Influencer Promotes Products (Based on Gender)

First, it turns out female Gen Z are the ones who prefer to find product information first before buying anything promoted by Influencers. From 40.4% of Gen Z who chose "researching product's information," 64.6% are female and 35.4% are male.

Reactions in the form of "keeping information to themselves" and "considering buying products" were also dominantly chosen by female Gen Z during the research. Meanwhile, minor reactions such as "directly buying products" and "criticizing promotions" was dominantly chosen by male Gen Z.



Those findings break the argument from Djafarova & Bowes (2020) that Instagram has an impact on impulsive buying behavior among female Gen Z.



CHAPTER 5

Gen Z's News Media Consumption

Gen Z's distinct media consumption patterns present a new challenge for news media who want to reach them. Some have made efforts such as starting to produce news content on digital platforms, curating hot topics that are being discussed online, and even changing business models (Kalim, 2021). That is a natural thing to do as Gen Z are known to have a high digital presence.

Even so, there are more things that news media need to consider in targeting this generation. According to our survey, reading news is not included in Gen Z's top five favorite activities in the digital realm. In addition, their attention span is no more than 8 seconds on average (Sparks & Honey, 2018). Those situations raise the question of whether Gen Z still consume news and what kind of news formats or topics that entice them.

Gen Z are still very likely to be exposed to information or news. However, their main source of accessing news is social media. With the unpredictable nature of social media algorithms, Gen Z tend to be exposed to news unintentionally or 'incidentally' (Antunovic et al., 2016). This condition makes it increasingly difficult for news media to reach Gen Z.

It should be noted that in this section, every media that provides news will be considered news media. Therefore, the term news media is not exclusive to those who only offer news content and not anything else.

The Definition of News According to Gen Z

News, according to the majority of Gen Z, is information about a current event. Furthermore, our finding shows, 8% of our Gen Z respondents associate the word news with facts, reality, and something whose validity can be verified.

"In my opinion, news is information that we get so that we know the latest events around us, be it local, national, or international." said one of our gen z respondents, Jerfi Nardi (24).

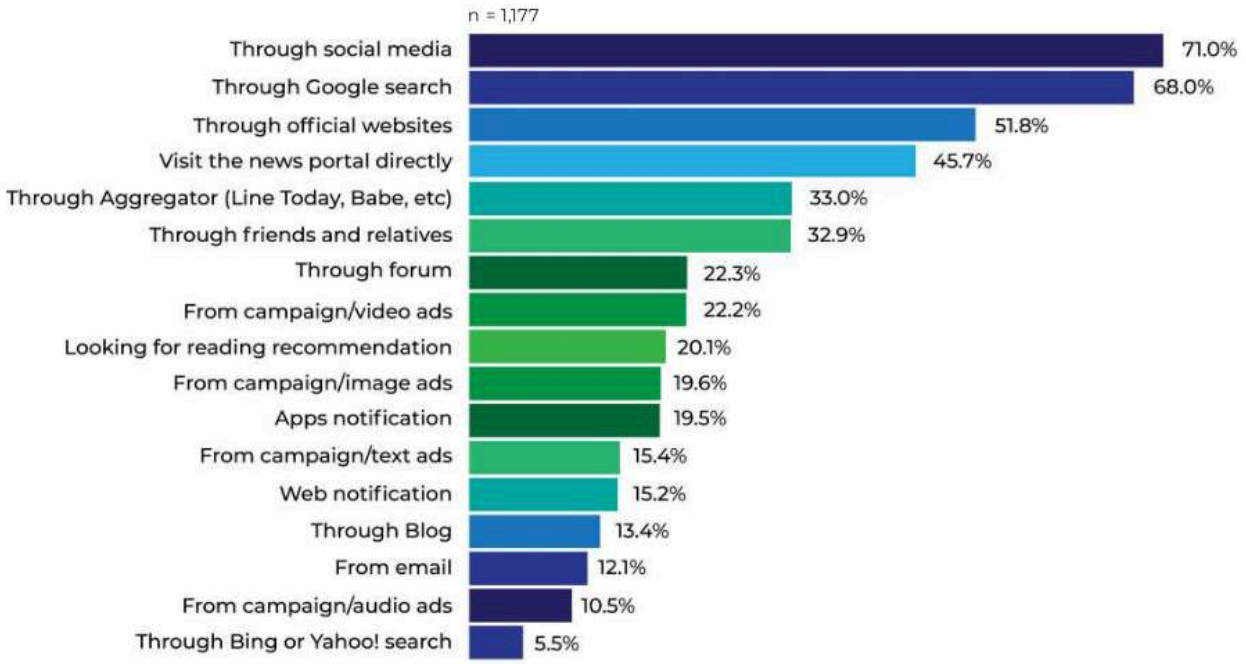
How Gen Z Access News or Information

The amount of time Gen Z allocate online affects how they access information. Rather than relying on traditional media like newspapers or magazines, they find information through social media (PrakashYadav & Rai, 2017). This is because social media is the second most frequently accessed media by Gen Z after messaging applications such as Line and WhatsApp.

That habit makes Gen Z tend to be exposed to news unintentionally (Antunovic et al., 2016), and our survey's results further strengthen that notion. When we asked our Gen Z respondents to name every scenario of how they access news, 71% admitted they found the news on social media, 66% in Google search, and 51.8% on news media's official account.

It is noteworthy that the unique nature of social media algorithms will determine what information Gen Z will get. "I think social media's unique algorithm helps me find news with those topics before I look for more specific information on Google," said one of the respondents, Hasim Fahrudin (23).

How Gen Z Access News or Information



Using the survey's results as a reference, it is evident that news media should make their journalistic products accessible on social media. Other than that, it is also wise for them to experiment with different types of news formats, thanks to the ever-growing features of social media (Newman et al., 2021). Some designs that can be used nowadays are carousels, infographics, and short videos.

"The goal is to present the information **as light or as brief as possible** while still ensuring that it lasts. It's bite-sized but accurate,"

- UMN's researcher, Nona Evita -

Gen Z's Top-of-mind News Media

When Gen Z were asked about the news media brand that first came to their mind, the 5 names came up as the top ranking. Kompas leads with 25%, followed by Detik.com. Meanwhile, the online news portal Kompas.com stands in third place. CNN, the only international media on that list, sits in fourth place. Meanwhile, online news aggregator platform, Line Today, took fifth place.

Kompas is gaining immense popularity among Gen Z, arguably, because it embraces the values of transcendental humanism. In addition, it is also actively trying to approach the younger generation through its sub-brand, Kompas Muda.

"Kompas uses a universal approach in delivering news or information. This makes their news content easily acceptable to people of any political, economic, and cultural background. Knowing that universalism and benevolence are the main values held by Gen Z, this kind of approach is the right one to use," said UMN Consulting's researcher, Albertus Prestianta.

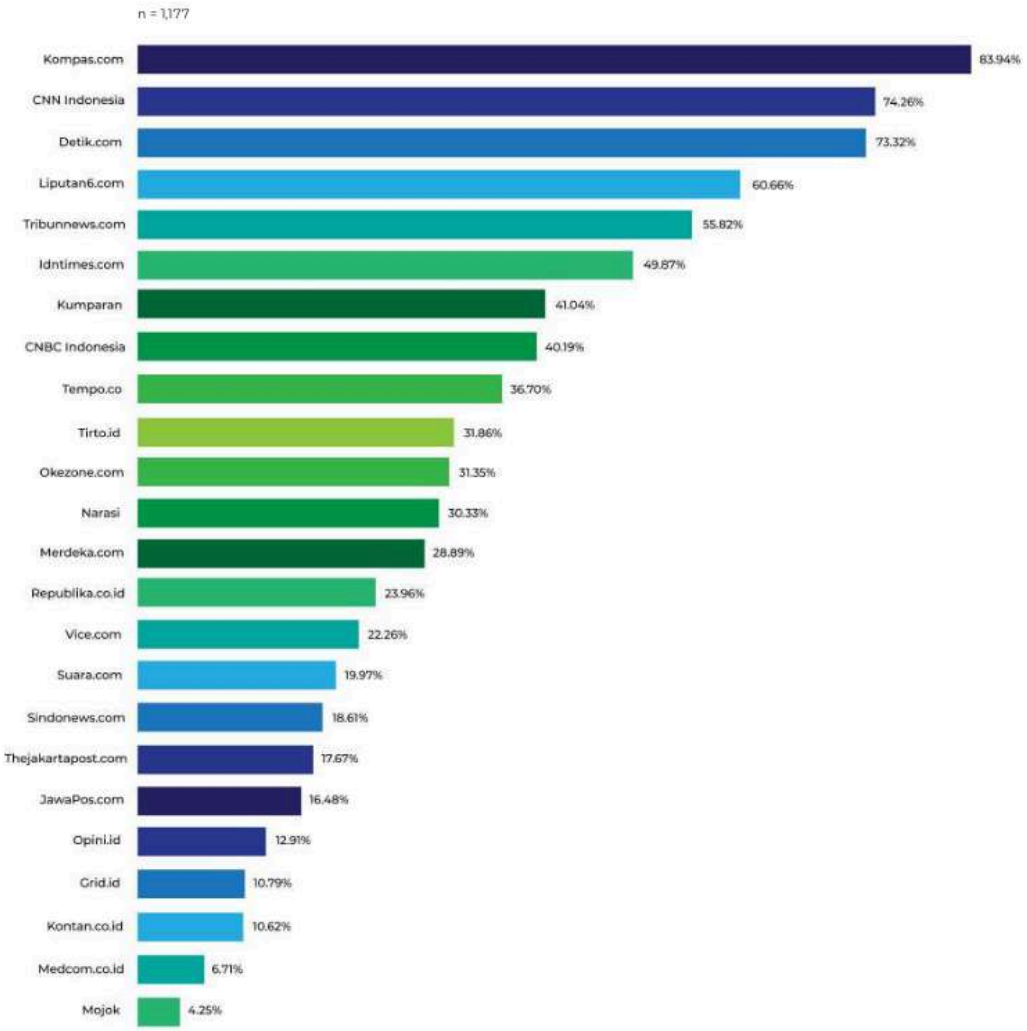
Gen Z's Online News Media Access

Since Gen Z gather information mainly in the digital realm, the news sources they use the most are online-based. Responding to that, many news media in Indonesia have shifted to digital platforms to survive (Geers, 2020). In 2019, the Press Council (Dewan Pers) reported that of 47,000 media registered in Indonesia, more than 90% of them were online-based media (43,803).

When we asked our Gen Z respondents to name every online news media they use, more than half of them answered Kompas.com (83.94%), followed by CNN Indonesia (74.26%), and Detik.com (73.32%). Their answer is also consistent with previous findings regarding their top-of-mind news media, which indicates that Gen Z prefer to access news media they are familiar.

To strengthen that argument, news media targeting the younger generation, such as Vice.com (22.26%), Opini.id (12.91%), and Mojok (4.25%), sit at the bottom 10 of the most accessed online news media. According to Gen Z, it is because only news media they are familiar with are guaranteed for their reliability, accuracy, and reputation.

"When the news media is familiar to me, I don't need to check the sources further to know that it's accurate because their reliability and reputation have spoken to me." said one of our Gen Z respondents, Wella Yolanda (21)



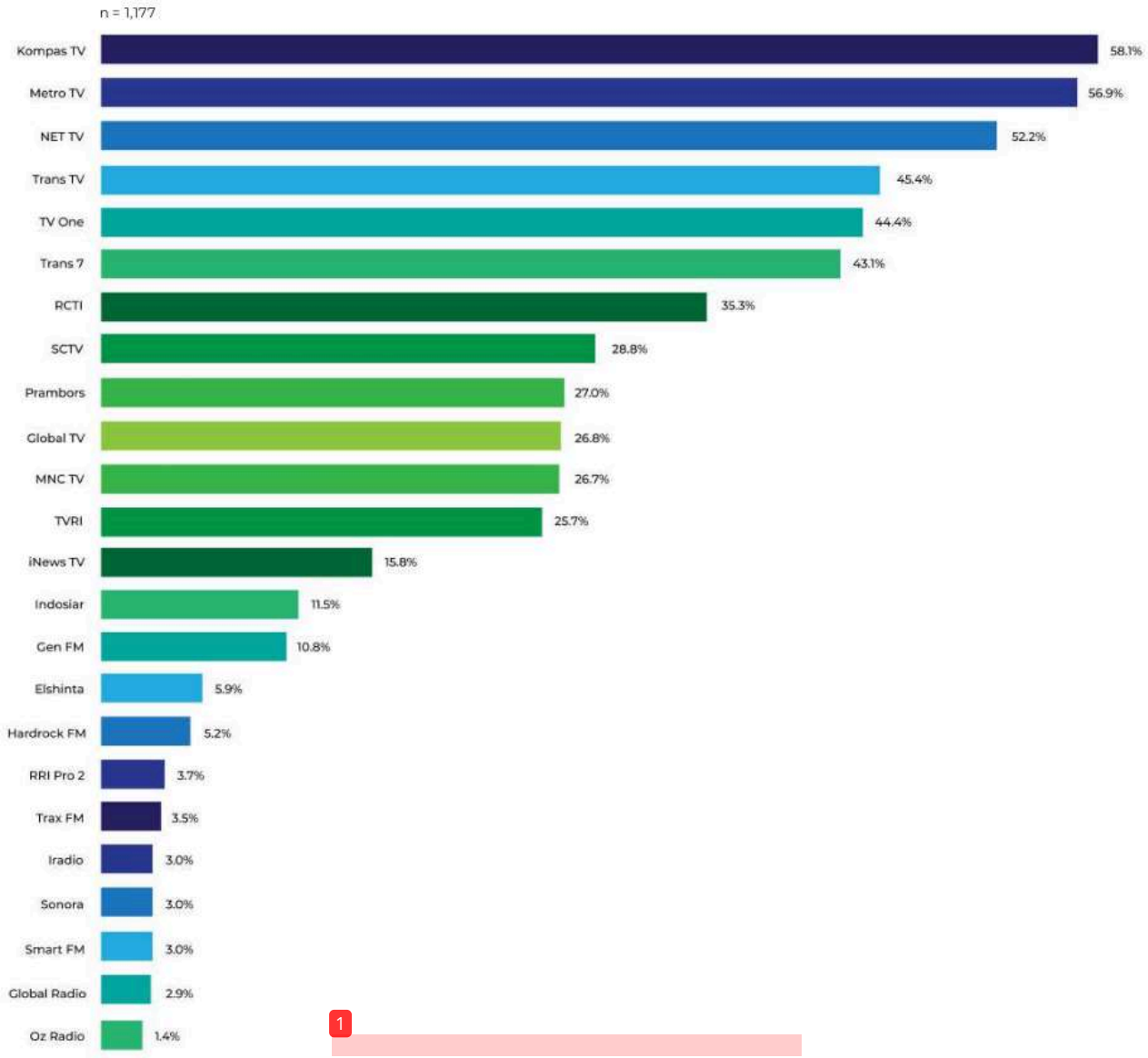
Gen Z's TV and Radio News Media Consumption

Although Gen Z barely show any interest in traditional media, they do still consume television and radio. During the pandemic, the television and radio industries recorded 10.42% of economic growth in 2020 according to Indonesian Tourism and Creative Economy Outlook (2020-2021). This indicates that Gen Z are still very likely to get news through both of them.

When we asked our Gen Z respondents to name every news channel on TV and radio they access, more than half of them said Kompas TV (58.1%) and Metro TV (56.9%). Meanwhile, the majority of the radio media stand at the bottom of the list. Only Prambors (27%) remains in the top position.

Those findings reaffirm the survey's results on Gen Z's device usage frequency and media access, where radio access is low. Arguably, those are interesting findings because, according to the same survey, digital audio platforms such as podcasts and online music streaming applications are the third most accessed media by Gen Z.

We argue, news media must start approaching Gen Z through digital audio platforms that can be



accessed on-demand. Apart from that, creating niche content will also be very helpful because Gen Z are attracted to authenticity. "Gen Z tend to move forward with what they want and need. They can no longer enjoy the content broadcasted according to a certain schedule. This can urge radio media to start creating content that can be accessed via digital platforms," said UMN's researcher, Rosalyn Asmarantika.

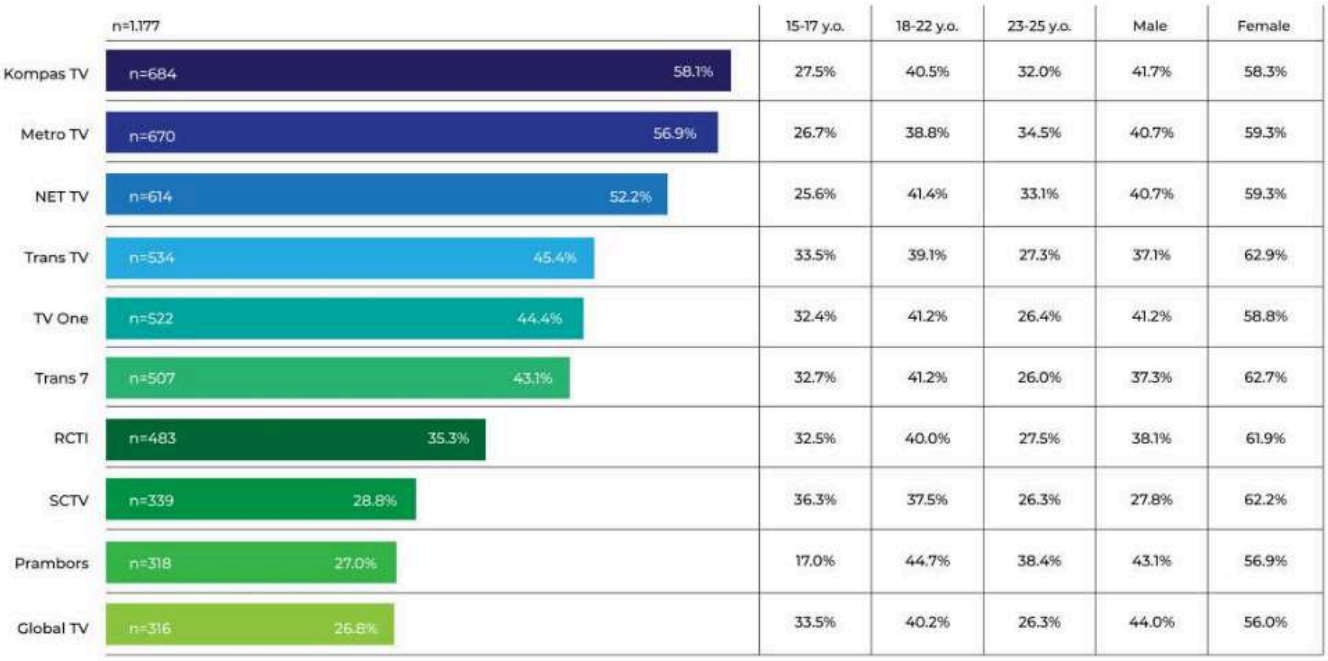
Gen Z's TV and Radio News Media Consumption Based on Age and Gender

As previously discussed, Prambors is the only radio media included in the top 10 lists of most accessed tv and radio media. Based on the survey's results, Prambors is accessed by 318 Gen Z respondents, with 17% of them are 15-17 years old, 44.7% are 18-22 years old, and 38.4% are 23-25 years old. In short, Prambors is more popular among the middle and older age groups.

Its high access, possibly, is because Prambors is specifically targeting younger audiences. It popularized the tagline "*Kawula Muda*" and has expanded into social media platforms such as Instagram, YouTube, Twitter, and TikTok. Instead of sticking with audio-based content, Prambors now explores more visual-based content.

Kompas TV and Metro TV, who are leading the list, are known as private news television networks that broadcast nationally. During research, Kompas TV was chosen by 684 Gen Z respondents, with 27.5% of them aged 15-17 years old, 40.5% aged 18-22 years old, and 32% aged 23-25 years old. Meanwhile, Metro TV was chosen by 670 respondents, with 26.7% of them aged 15-17 years old, 38.8% aged 18-22 years old, and 34.5% aged 23-25 years old.

During the research, UMN's researcher Rossalyn Asmarantika explained that television media that occupy the top list are those that specifically provide news content. "It shows that Gen Z tend to rely on media that specifically delivers news content in looking for news or information," said Rossalyn Asmarantika.



Gen Z's TV and Radio News Media Consumption Based on Region

It is evident from the data that most of the television and radio media consumed by Gen Z have more audiences in Greater Jakarta and Java compared to other regions. Let's take a look at Kompas TV's numbers. As Gen Z's most accessed news media, Kompas TV was chosen by 684 Gen Z respondents during the research. Around 40.8% of them from Greater Jakarta, while 23.2% from Java Regions.

A similar case can be seen with Metro TV. With only a few numbers different from Kompas TV, Metro TV was chosen by 670 Gen Z respondents during the research. Around 37.9% of them from Greater Jakarta, while 20.4% from Java.

Compared to Greater Jakarta and Java Island, the numbers in Sumatera, Sulawesi, Kalimantan, Bali-Nusa Tenggara, and Maluku-Papua are consistently lower. Those findings indicate that access to television and radio media is still centralized on Java Island. That is probably related to technical reasons.

Looking at the data again, TV One has relatively higher access outside Java Island than Kompas TV and Metro TV. From 522 Gen Z respondents, 22.6% of them from Sumatera, 6.7% from Sulawesi, 5.4% from Kalimantan, 5.9% from Bali-Nusa Tenggara, and 4.8% from Maluku-Papua. Only in Kalimantan the percentage is lower than Metro TV.

"When I was doing coverage on Natuna Island, I asked the residents which television channel they prefer and why. Surprisingly, they chose TV One because it is the only channel with clear viewing," said UMN's researcher Rossalyn Asmarantika when she shared her experience as a reporter for Metro TV.

	Jabodetabek	Jawa	Sumatera	Sulawesi	Kalimantan	Bali & Nusa Tenggara	Maluku & Papua
Kompas TV	40.8%	23.2%	18.1%	4.7%	4.8%	4.7%	3.7%
Metro TV	37.9%	20.4%	20.9%	5.5%	6.4%	5.1%	3.7%
NET TV	39.3%	24.6%	16.3%	5.2%	7.0%	5.0%	2.6%
Trans TV	35.4%	23.2%	19.3%	6.4%	6.2%	6.0%	3.6%
TV One	33.5%	21.1%	22.6%	6.7%	5.4%	5.9%	4.8%
Trans 7	33.7%	24.1%	19.1%	6.1%	6.1%	7.1%	3.7%
RCTI	34.5%	24.1%	20.2%	6.5%	5.3%	5.8%	3.6%
SCTV	35.4%	23.0%	21.2%	4.4%	6.5%	6.5%	2.9%
Prambors	53.8%	23.9%	10.1%	2.2%	6.0%	2.5%	1.6%
Global TV	34.5%	22.8%	22.5%	4.7%	7.3%	4.7%	3.5%

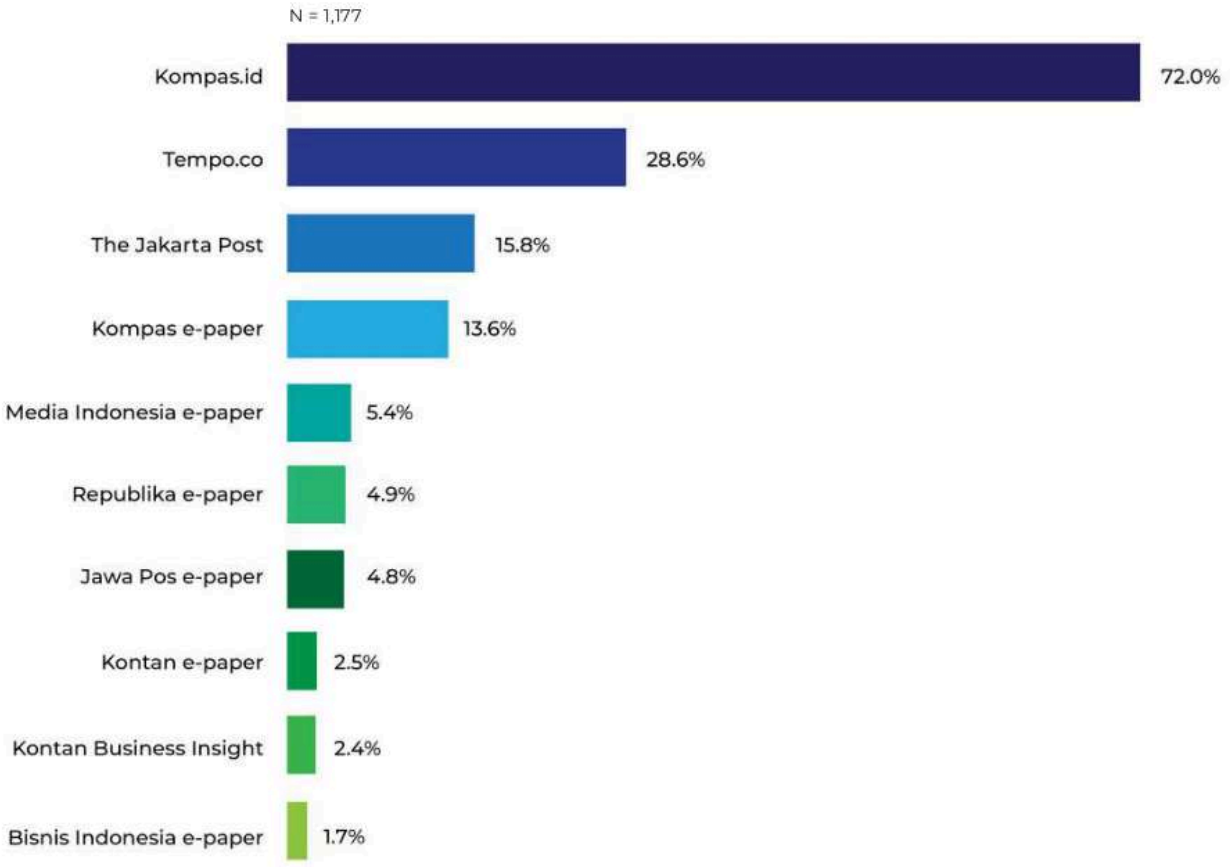
Gen Z's Consumption of Digital Subscription-based News Media

Even though most Gen Z are still not financially independent, they are open to accessing digital subscription-based news media. Our data shows that 57.3% of Gen Z still depend on their parents' allowance. Based on this condition, they tend to choose news media that offer premium-paid content but can still be accessed freely.

Based on our survey, Gen Z prefer to access Kompas.id (72%), Tempo.co (28.6%), and The Jakarta Post (15.8%) the most. These digital subscription-based news media also provide free content besides premium content on their websites. Other than that, our data show that Gen Z tend not to access digital newspapers or e-papers with premium and limited access.

The low level of access to e-papers, according to UMN's researcher Rossalyn Asmarantika, is caused by the rule which requires people to subscribe first before reading it. In this regard, Rossalyn Asmarantika reaffirmed during the research that Gen Z don't necessarily subscribe to the news media, but they show an effort to access it.

"If we want to see the tendency of Gen Z to subscribe to the news media, we need to look at the budget allocation they have for this purpose. Our research finds that most Gen Z spend less than IDR 50,000 for subscriptions," added UMN's researcher Nona Evita.



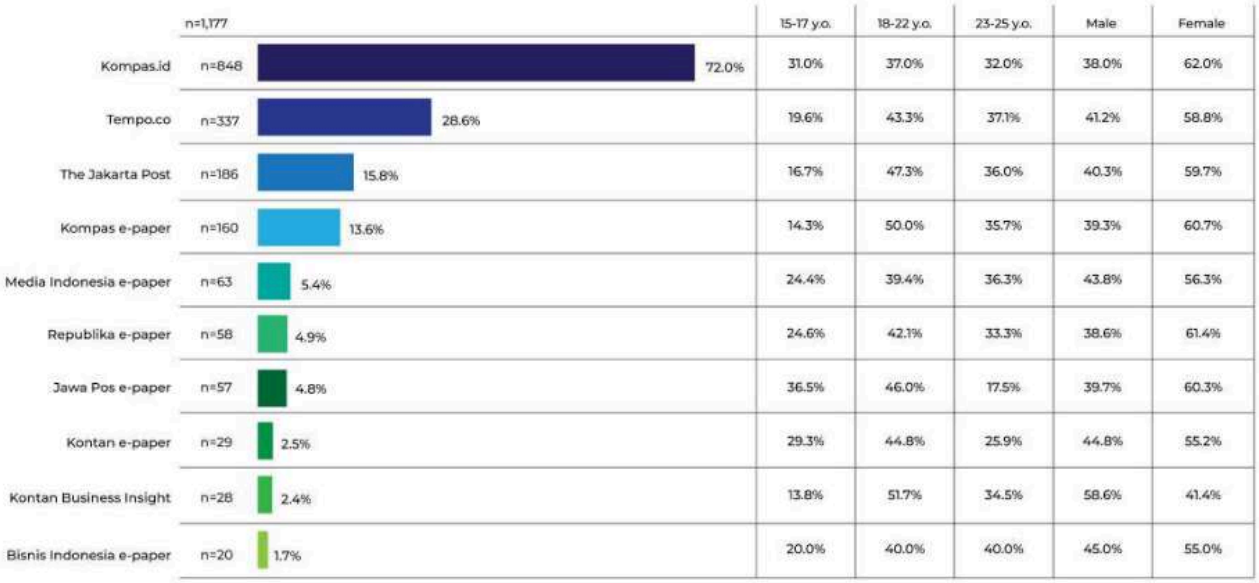
Gen Z's Consumption of Digital Subscription-based News Media Based on Age and Gender

The middle and older Gen Z dominate the access to the top 3 digital subscription-based news media: Kompas.id, Tempo.co, and the Jakarta Post. Kompas.id, for example, was chosen by 848 Gen Z respondents during the research, with 31% of them aged 15-17 years old, 37% aged 18-22 years old, and 32% aged 23-25 years old. Meanwhile, Tempo.co was chosen by 337 Gen Z respondents, with 19.6% of them aged 15-17 years old, 43.3% aged 18-22 years old, and 37.1% aged 23-25 years old.

The Jakarta Post, which is famous for its English-language news content, was chosen by 186 Gen Z respondents. Of that number, 16.7% of them aged 15-17 years old, 47.3% aged 18-22 years old, and 36% aged 23-25 years old.

Still in the same survey, subscription-based news media that focus on business and economic topics have the lowest level of access among Gen Z. Looking at the distribution according to gender, access to these media is consistently dominated by females. Different things happened to KONTAN Business Insight which has 58.6% male audience from 28 respondents.

What can be concluded from this part is that the middle and older Gen Z have more tendency to access subscription-based news media compared to the younger group. Arguably the difference is caused by their different needs as the middle and older Gen Z will need more information from news to support their study or job (Sakdiyakorn et al., 2021).



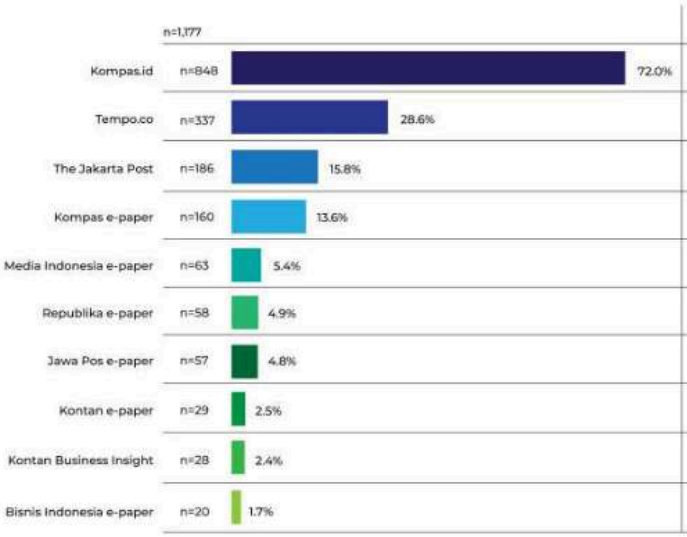
Gen Z's Consumption of Digital Subscription-based News Media Based on Region

Consistent with what we find regarding television and radio media, access to digital subscription-based news media is also centralized in Greater Jakarta and Java Regions. Of 848 Gen Z respondents who chose Kompas.id during the research, 37.5% from Greater Jakarta, and 21.3% from Java. Turning to Tempo.co, out of 337 respondents who chose it, 39.5% from Greater Jakarta, and 22.0% from Java.

However, when it comes to e-papers, we start to get some interesting numbers. According to the survey's results, e-papers tend to be more prevalent in several regions outside Java Island. For example, of 57 Gen Z respondents who chose Jawa Pos E-paper during the research, 25.4% from Sumatera, and 14.3% from Java. Another example, from 20 respondents who chose Business Indonesia E-paper, 30% from Sumatera, and 20% from Java.

We argue that the high access to e-papers outside Java Island is caused by the digital divide in Indonesia's western and eastern regions. The difficulty of accessing the internet has made Gen Z outside Java Island more flexible in consuming e-papers.

"E-papers are easier to access with unstable signal strength because they only need to download it once, and then they can read several pages immediately. On the other hand, subscription-based news media in the form of websites need a stable connection," said UMN's reseaecher, Rossalyn Asmarantika.



	Jabodetabek	Jawa	Sumatera	Sulawesi	Kalimantan	Bali-Nusa Tenggara	Maluku-Papua
Kompas.id	37.5%	21.3%	20.8%	4.7%	6.0%	5.9%	3.8%
Tempo.co	39.5%	22.0%	18.1%	3.9%	5.9%	6.8%	3.9%
The Jakarta Post	52.7%	23.7%	12.4%	1.6%	4.3%	4.3%	1.1%
Kompas e-paper	42.9%	14.3%	14.3%	7.1%	10.7%	3.6%	7.1%
Media Indonesia e-paper	45.6%	20.6%	18.1%	5.6%	5.0%	3.1%	1.9%
Republika e-paper	24.6%	45.6%	7.0%	5.3%	7.0%	8.8%	1.8%
Jawa Pos e-paper	38.1%	14.3%	25.4%	11.1%	1.6%	3.2%	6.3%
Kontan e-paper	31.0%	22.4%	24.1%	5.2%	12.1%	3.4%	1.7%
Kontan Business Insight	37.9%	24.1%	17.2%	3.4%	6.9%	6.9%	3.4%
Bisnis Indonesia e-paper	35.0%	20.0%	30.0%	10.0%	0.0%	0.0%	5.0%

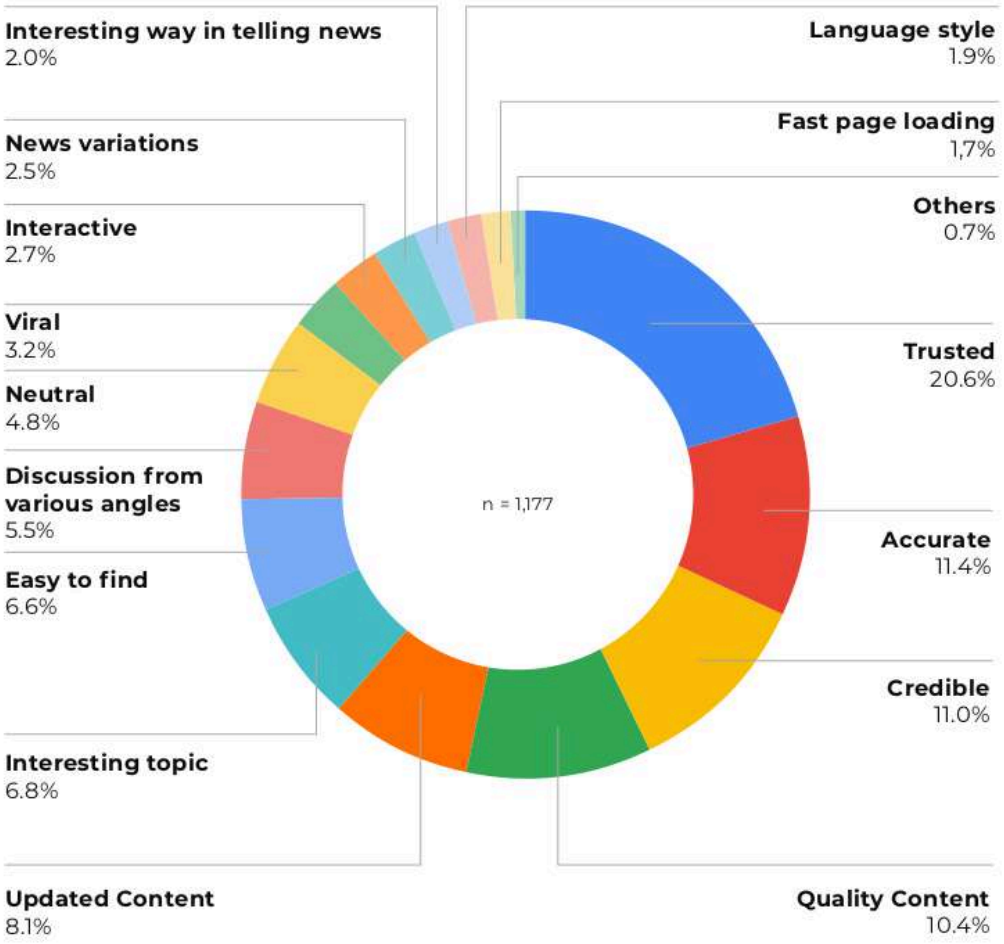
Gen Z's Top 5 Reasons in Choosing News Media

Gen Z are known to be mature in making decisions and that affects how they choose news media. Overall, they prioritize 'Trust' more than 'Speed' of release. In addition to that, they also pay attention to the 'Quality' of the news. This is due to their tendency to break the chain of disinformation (Fletcher & Park, 2017). When information emerges, they are more likely to keep it to themselves first.

Those reasons are reflected in their top 5 reasons for choosing news media. Gen Z want news media that are trustworthy (20.6%), accurate (11.4%), credible (11%), high-quality (10.4%), and up to date (8.1%). The credibility here is closely related to the trustworthiness of the news sources and the reputation of the news media that release it.

"Gen Z don't always look for the fastest news or information. What they need is reliable, guaranteed, and accurate news," said UMN's researcher, Rossalyn Asmarantika.

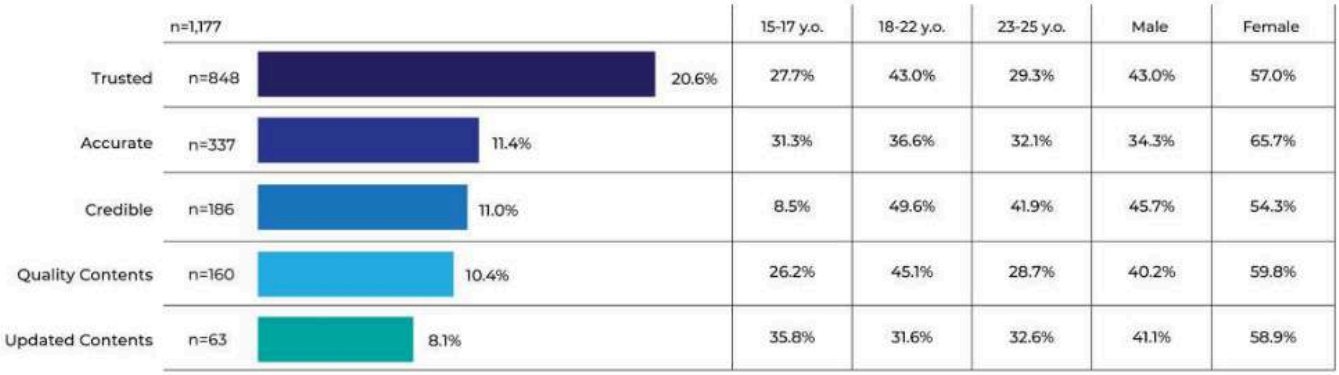
When we asked about the importance of credibility in choosing news media to our respondents, one of them, Richard Marx (21), explained that credibility includes all other aspects such as accuracy, reputation, and trustworthiness. "I think credibility includes accuracy. When a news media has a good reputation, you can be sure that all the news is accurate." said Richard.



Gen Z's Top 5 Reasons in Choosing News Media Based on Age and Gender

As previously mentioned, the top three reasons for Gen Z in choosing news media are Trustworthiness (20.6%), Accuracy (11.4%), and Credibility (11%). If we break down those numbers, we will see that most of our respondents who consume news media come from the middle group.

For example, of 20.6% of Gen Z respondents (from 1177) who chose trustworthiness during the research, 27.7% aged 15-17 years old, 43% aged 18-22 years old, and 29.3% aged 23-25 years old. Another example, of 11% of respondents who chose credibility, 8.5% aged 15-17 years old, 49.6% aged 18-22 years old, and 41.9% aged 23-25 years old.



	15-17 y.o.	18-22 y.o.	23-25 y.o.	Male	Female
Trusted	27.7%	43.0%	29.3%	43.0%	57.0%
Accurate	31.3%	36.6%	32.1%	34.3%	65.7%
Credible	8.5%	49.6%	41.9%	45.7%	54.3%
Quality Contents	26.2%	45.1%	28.7%	40.2%	59.8%
Updated Contents	35.8%	31.6%	32.6%	41.1%	58.9%

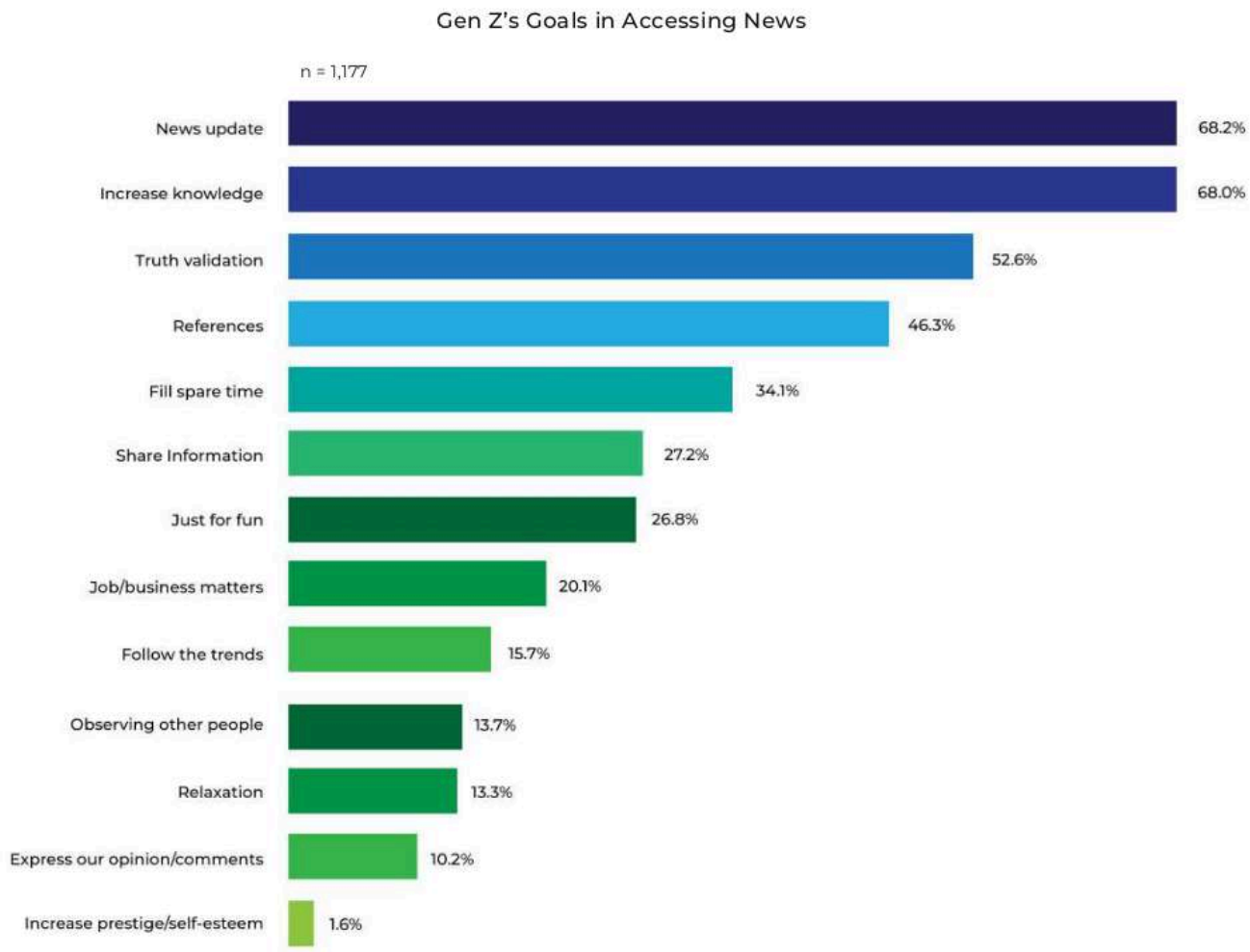
Gen Z's Goals in Accessing News

There are various goals that Gen Z want to achieve through accessing news. We asked our respondents to name every goal they want to accomplish through consuming news, and we got lots of different answers during the research.

Based on the survey's results, Gen Z's primary motivation when accessing news is to stay up to date on the latest information (68.2%) and expand their knowledge (68%). In addition to that, more than half of them also access news to validate information (52.6%), strengthening the notion that Gen Z are against disinformation.

According to the Indonesian Ministry of Communication and Information (2017), around 800,000 sites in Indonesia have been accused of spreading hoaxes or false information. That condition has shaped Gen Z into a critical generation that prioritizes accuracy, trustworthiness, and credibility more than anything else when it comes to news (Fletcher & Park, 2017).

"When I come across a piece of news or information, I tend to keep it to myself first. After that, I will look for references from other sources to verify it. If the information is correct, then I will pass it on to others." said one of the gen z respondents, Jerfi Nardi (24).



Gen Z's Goal in Accessing News Based on Age and Gender

Based on the survey's results, the purposes of staying up to date, increasing knowledge, validating truth, and seeking references are chosen mainly by the middle and older age groups. A different result can be seen in the purpose of "filling spare time", which the younger and middle age groups mostly chose. Of 401 Gen Z respondents who chose it during the research, 32.4% of them aged 15-17 years old, 36.9% aged 18-22 years old, and 30.7% aged 23-25 years old.

Those findings indicate that younger respondents are more likely to be motivated by entertainment and information when accessing news. Meanwhile, older respondents are more likely to access news to validate their opinions or get verification regarding specific issues (Lee, 2013). Besides that, Gen Z's news consumption pattern is also dominated by information-motivated and entertainment-motivated.

We argue that Gen Z have a strong urge to seek information in digital media. This is due to the parenting style of previous generation, namely Gen X, which emphasizes the values of life to 'break free' or appear genuinely different. "If we talk about eastern culture, these values cannot be completely different. There will always be remnants of ancestral culture left behind," said UMN Consulting's researcher, Albertus Prestianta.

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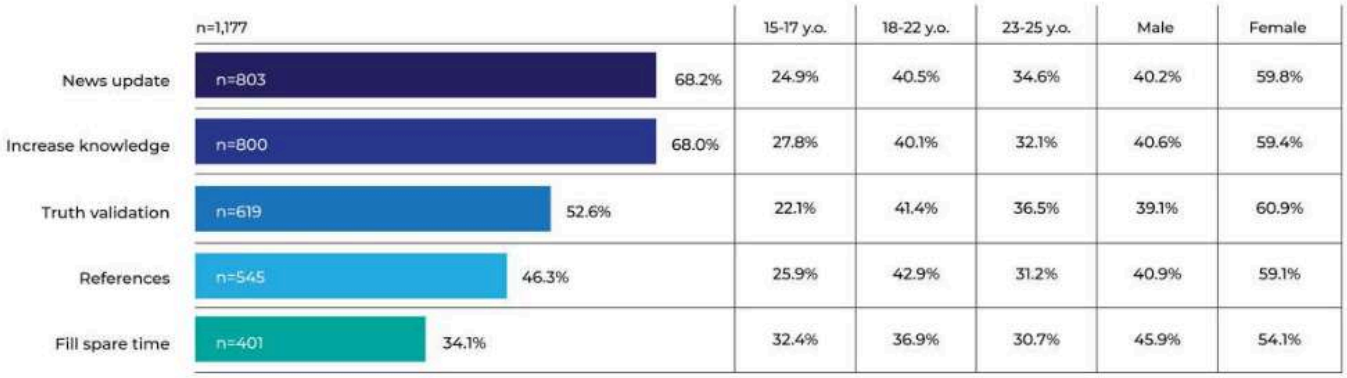
Albertus added that Gen Z live amidst the ease of access to education, making them inclined to be more critical than previous generations. At the same time, the clash of knowledge gained from their parents and the outside world makes it difficult for them to determine which one is right. "This urge makes them seek as much information as possible from the digital realm. At the same time, they also want balance. So they go for entertainment," added Albertus.

Gen Z's Goals in Accessing News Based on Age and Gender



Gen Z's Goal in Accessing News Based on Region

The region where Gen Z live also affects their goals in accessing news or information. The purpose of updating news or information was chosen by 803 Gen Z respondents, with 41% in Greater Jakarta and 22.3% in Java. The closer the region is to the eastern part of Indonesia, the percentage is getting smaller. The same thing happens for other purposes such as validating the truth, looking for references, and filling spare time.

However, during the research, we found something different in terms of increasing knowledge. Of 800 Gen Z respondents who chose it, 40.1% in Java, 32.1% in Sumatra, 27.8% in Sulawesi, 40.1% in Kalimantan, 32.1% in Bali-Nusa Tenggara, and 27.8% in Maluku-Papua. Meanwhile, only 27.8% in Greater Jakarta.

That finding further confirms a digital divide between Gen Z in big cities and those in other regions in Indonesia. Gen Z in Greater Jakarta tend to get information with so much ease that they only need to keep updating to the newest ones (Worldbank, 2021).. On the other side, it also shows that Gen Z outside of Greater Jakarta find it challenging to get the latest information. Therefore, the news is more for increasing their knowledge.

"In addition to signaling the digital divide, the difference in the purpose of accessing news by Gen Z based on their region also shows the diverse habits in big cities and other regions. In Greater Jakarta, things move quickly so that Gen Z in the region always want something new," said UMN Consulting's researcher, Albertus Magnus Prestianta.

Gen Z's Goal in Accessing News Based on Region

	n=1,177	Jabodetabek	Jawa	Sumatera	Sulawesi	Kalimantan	Bali-Nusa Tenggara	Maluku-Papua
News update	n=803 68.2%	41.0%	22.3%	18.9%	4.6%	5.4%	5,0%	41.0%
Increase knowledge	n=800 68.0%	27.8%	40.1%	32.1%	27.8%	40.1%	32,1%	27.8%
Truth validation	n=619 52.6%	40.9%	22.1%	19.2%	4.5%	6.1%	4,7%	2.4%
References	n=545 46.3%	41.3%	23.5%	16.9%	4.8%	5.7%	4,6%	3.3%
Fill spare time	n=401 34.1%	33.9%	25.9%	21.4%	6.5%	5.5%	4,7%	2.0%

Gen Z's News Reading Tendency

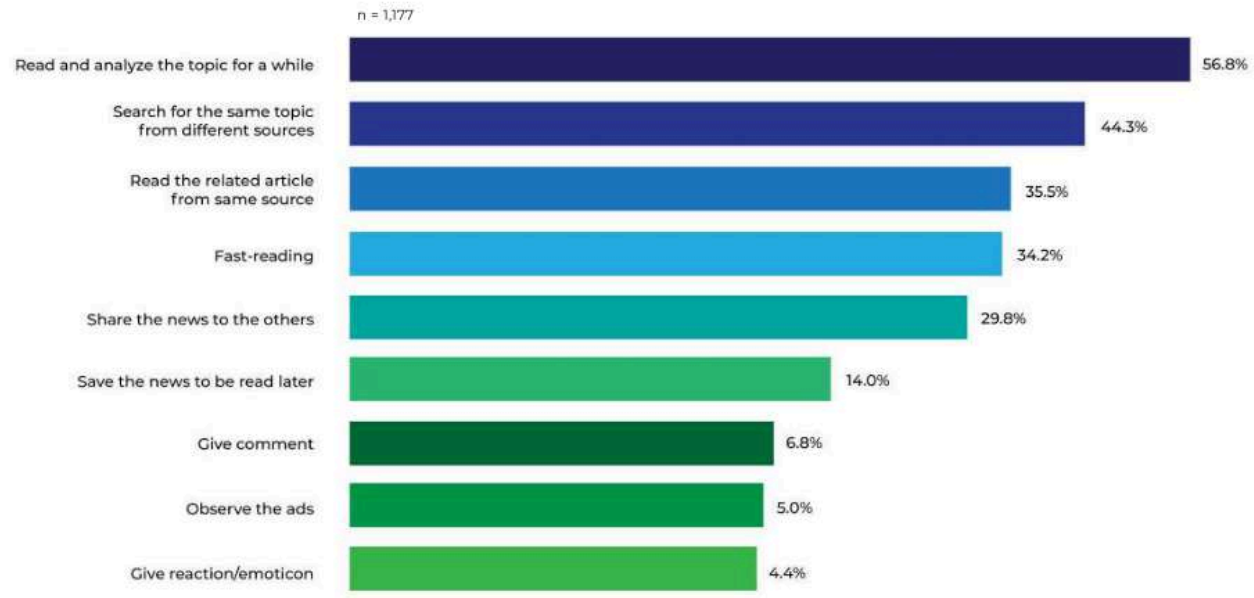
So far, our research has pointed out that Gen Z are well aware of what they want and what they don't want. Hence, news media companies need to understand Gen Z's news reading tendencies to be able to strive in the middle of rigorous competitions.

Based on our Gen Z respondents' answers, when we asked them to name their news reading tendencies, most were quite cautious in filtering information. Around 56.6% of our respondents tend to read and analyze a topic when accessing related information.

Furthermore, the tendency to look for the same topic from different sources when reading news accounts is 44.3%. We argue that these tendencies based on Gen Z's digital prowess and their need for credible and high-quality content.

"In general, I prefer media that convey true and verified information. I like it better if the information is easily found on digital platforms. To me, it means they keep updating it. And I really hate it when the media include political agenda or worse, hoax or unnecessary info surrounding the celebrity's life."

Timothy Happy, Employee (23).



Gen Z's News Reading Tendency Based on Age and Gender

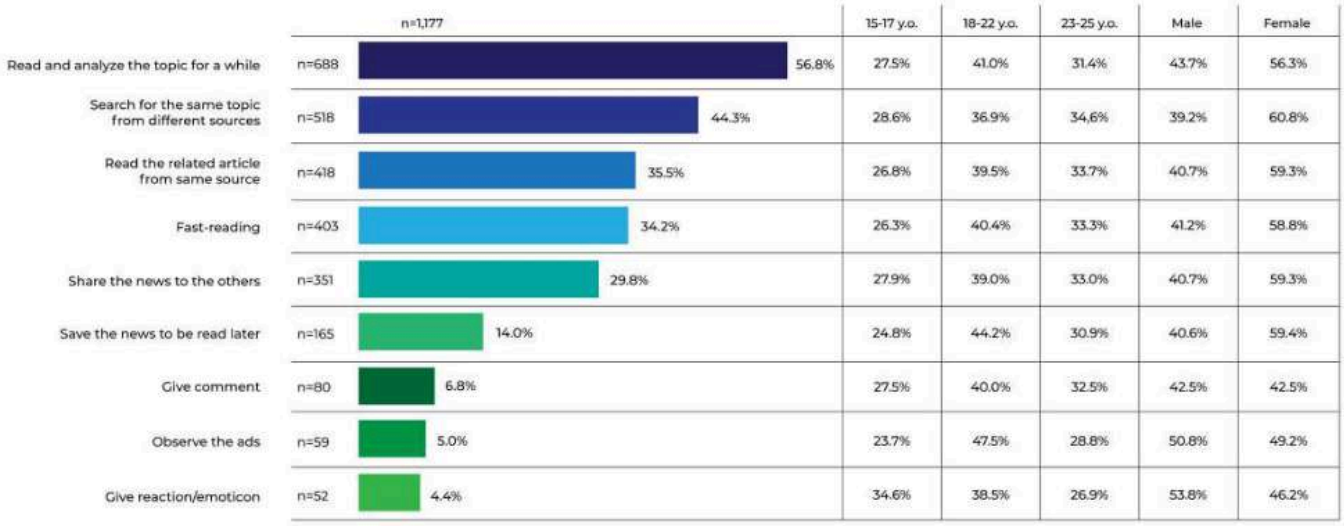
This section breaks down previous numbers to see if there's any age or gender-specific tendency in news reading. The results are consistent with previous findings, showing that the middle and older age group tend to be more active and purposeful in consuming news media.

For example, of 668 Gen Z respondents (56.8%) who chose "reading and analyzing topics first", 27.5% aged 15-17 years old, 41% aged 18-22 years old, and 31.4% aged 23-25 years old. In other words, the middle and the older age group tend to be more analytical and critical in reading news.

A similar finding can be seen in the second-best tendency, "looking for similar topics from different sources". Of 518 Gen Z respondents (44.3%) who chose it, 28.6% aged 15-17 years old, 36.9% aged 18-22 years old, and 34.6% aged 23-25 years old.

For the third news reading tendency, 418 of our Gen Z respondents (35.3%) chose to read related articles from the same news media. Our data shows that 26.8% of them aged 15-17 years old, 39.5% aged 18-22 years old, and 33.7% aged 23-25 years old during the research

Looking at the chart, we can see that the 18-22 age group dominates each news reading tendency. Furthermore, their news reading tendency is exploratory, which is more analytical and critical. Once again, these tendencies formed thanks to their nature of being digital natives—they access and assess information wisely.



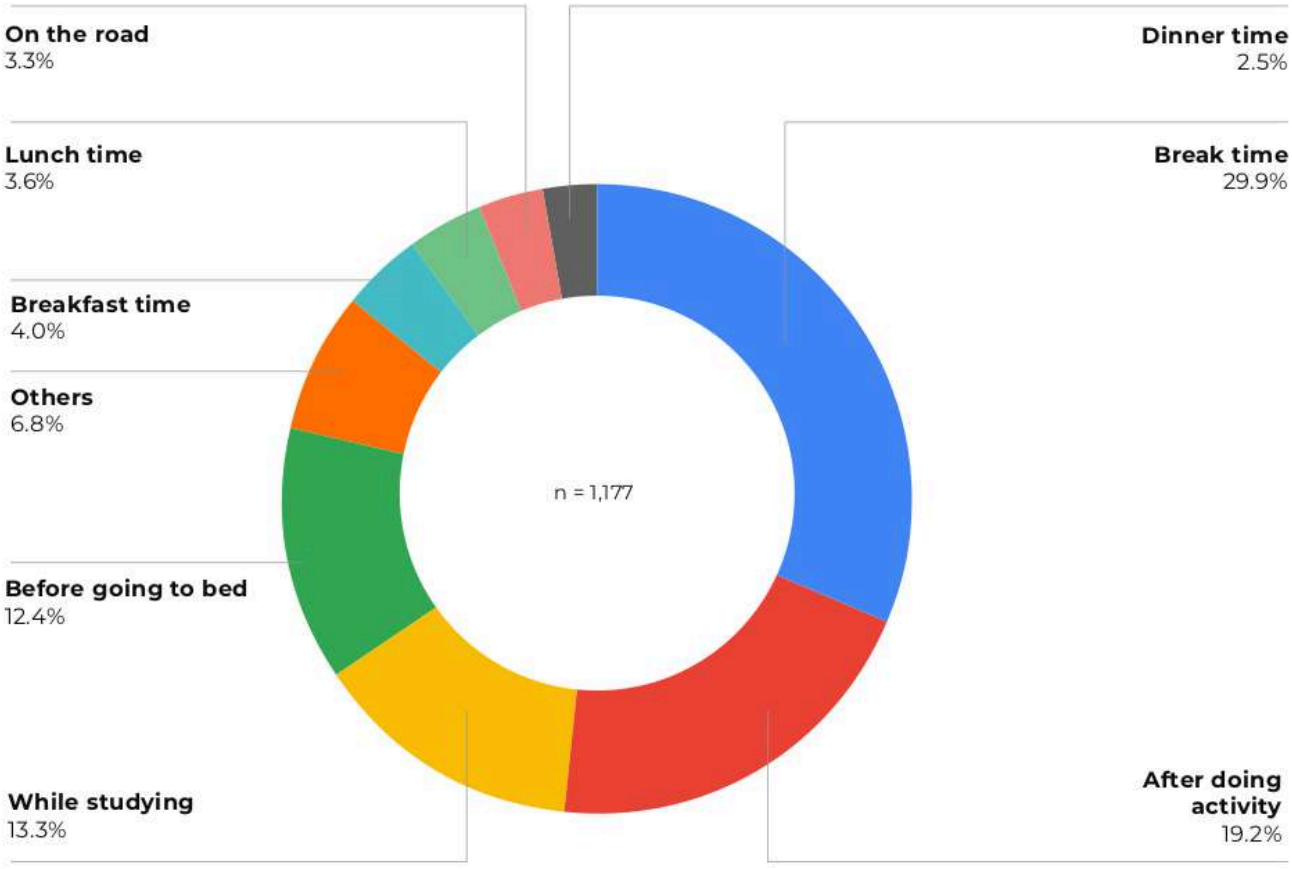
Gen Z's Favorite Time to Access News

In this section, we see in detail how Gen Z allocate their time for news consumption. It's interesting to note that based on our previous section on Gen Z's Digital Activities, it is apparent that the act of reading is not Gen Z's priority in ***the*** digital realm. It doesn't even make it to Gen Z's top 10 favorite activities to do in the digital realm. In Gen Z's term, reading is more related to reading news about entertainment. Interestingly, based on this report, it turns out Gen Z allocate particular time to accessing news.

Based on our survey, 29.9% of Gen Z access news during their break time or after finishing their activities. In other words, Gen Z are prone to dedicate their own time to news reading, making it possible for them to fully understand and validate the news they are reading.

"I read the news at night after doing all of my activities. While reading, I prefer to look for the same topics from various sources as a reference to make sure what I'm reading is true."

Dinda Zavira, Fresh Graduate (22)



Highly Attractive News Content/Topic for Gen Z

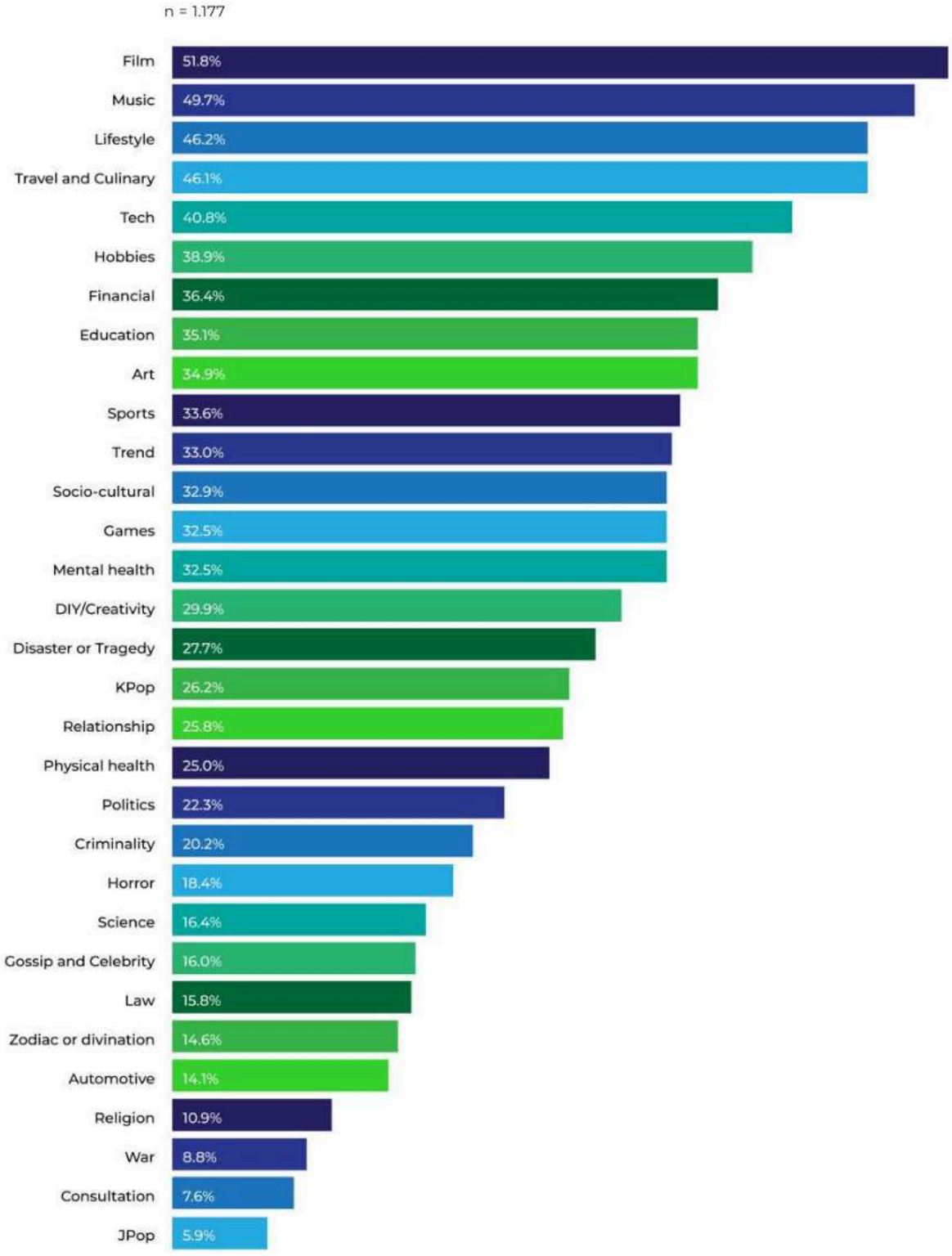
Seeing that reading news does not make it Gen Z's favorite activity in the digital realm, it's crucial to know which type of content they prefer. It is the way to gain their attention. This has something to do with Gen Z's tendency to read the news accidentally through social media or also known as incidental news exposure (Antunovic et al., 2016).

During the research, we asked our respondents to name every news topic they want. Based on what we've gathered and listed, entertainment and soft news content are loved by Gen Z. At the top of the list is film-related content with 57.8%. Next, we have music (49.7%), lifestyle (46.2%), travel and culinary (46.1%), and technology (40.8%). In other words, topics related to lifestyle, technology, hobbies, finance, and education are more attractive for Gen Z. They will become even more attractive if they are shared or posted on social media.

"I usually count on my social media accounts to update my news reading activity. For me, I like Instagram the most. From their recommendations or looking at what my friends are sharing, I get to see various news, ranging from hard news to entertainment type of news. Then, I'll explore the ones I'm truly interested in,"

Dinda Zavira, Fresh Graduate (22).

Highly Attractive News Content/Topic for Gen Z

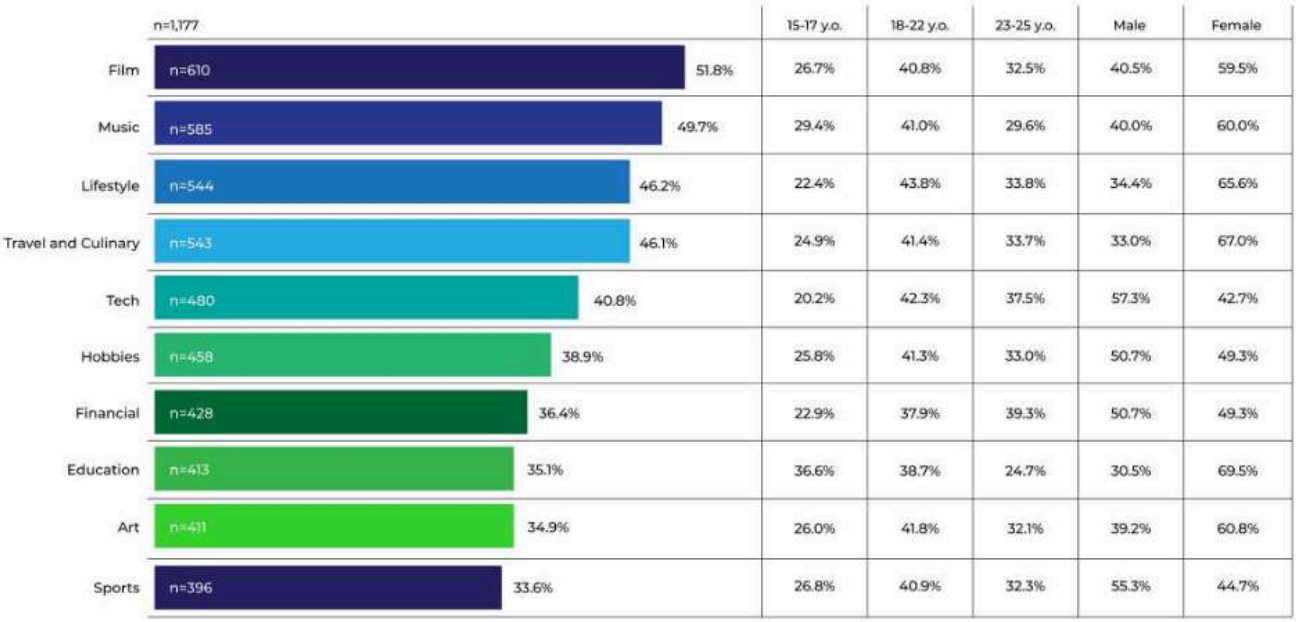


Gen Z's Top 10 News Contents/Topics Based on Age and Gender

We found two interesting discoveries from our Gen Z respondents during the research. First, looking through age perspective, Gen Z aged 23-25 years old are more interested in content about the economy, finance, business, and investment. It shows that those issues are more important for the older age group who are financially more established or have just started their career. For them, information about business and finance is essential to build their career and financial status (Sakdiyakorn et al., 2021).

Second, using gender perspectives, male Gen Z are more interested in news content related to technology, hobbies, economy, and sports. On the other side, female Gen Z are interested in film, music, lifestyle, and cuisine.

A bit of a teaser, the notion that male Gen Z are more interested in finding information about investments will be explored in our next whitepaper about Gen Z's Financial Literation. "Our next research confirms this. Male Gen Z are more eager to find information about investments and bolder to spend their money here. Further details will be on our next report," said UMNC's researcher, Albertus Prestianta.



CHAPTER 6

Gen Z Digital Media Subscription

Media industries are in the middle of a major shift right now. Many companies are changing their business model or revenue strategies to strive and survive in the ever-changing industries. One of the hottest trends right now is about implementing a digital media subscription strategy.

In a digital media subscription strategy, media companies charge customers a recurring monthly or yearly fee to access their digital content across various gadgets. Unlike Micro Transaction (MTX), the key focus of subscription is customer retention, not acquisition (Tariq, 2019.).

The trend started when tech companies such as Facebook (now Meta) and Google (now Alphabet) began to dominate the ads market (Burch, 2019). The situation left media companies with no choice but to look for other strategies to make money. Previously, most media companies relied on ads revenue which helped them grow rapidly during the pre-internet era.

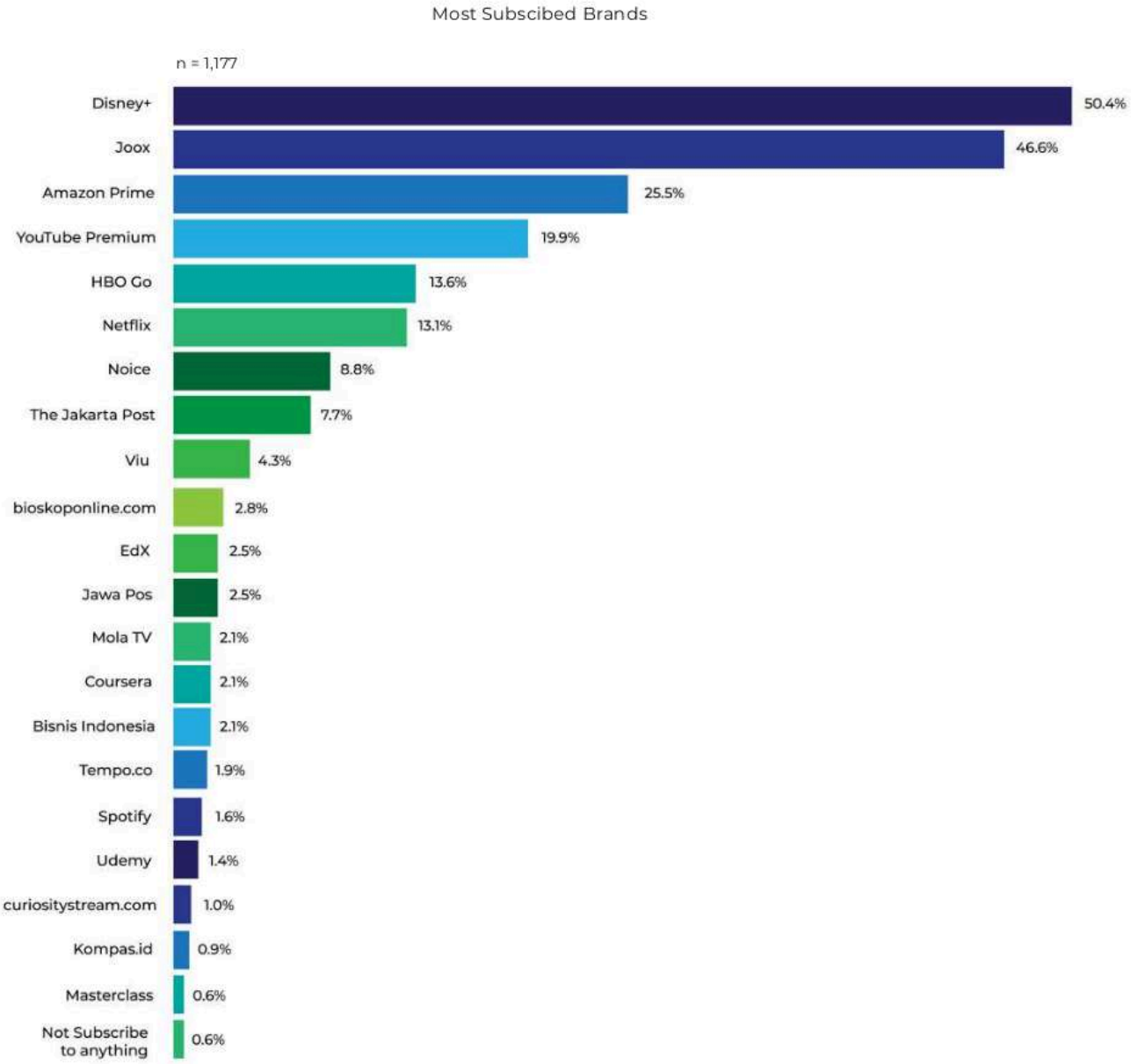
Statistically, Gen Z are the biggest consumer of digital content right now. As the amount of digital content in subscription services becomes bigger and bigger, it is essential to know Gen Z's behavior toward digital media subscriptions. This section will explore Gen Z's interest in digital media subscriptions, their subscription budget, how they pay for subscriptions, and their favorite brands.

Most Subscibed Brands

There are various digital media subscription services available in the market right now. One of the most well-known is Netflix which coined the term "Binge-Watching". The former video-rental service changed the market when it pivoted to a subscription service and started to produce its own content to build a massive library of IPs (Netflix, 2022). Now, almost every publisher in Hollywood has its own subscription (streaming) services.

Interestingly, while Netflix can be one of the most well-known subscription services, it is not the most popular among Indonesian Gen Z during the research. The result shows that the top 3 most subscribed media brands are Disney+ (50.4%), Joox (46.4%), and Amazon Prime. How about Netflix? It stands in the sixth spot with 13.1%. According to UMN researcher Nona Evita, the subscription fee could be a factor in this matter.

Disney+, as you might have known, is a streaming service owned by the Walt Disney Company (DMED, 2022). It offers its monthly subscribers access to various movies and series from Disney's popular IPs such as Marvel, Pixar, Star Wars, and National Geographic. Amazon Prime is similar to Disney+, while Joox is a music streaming service.



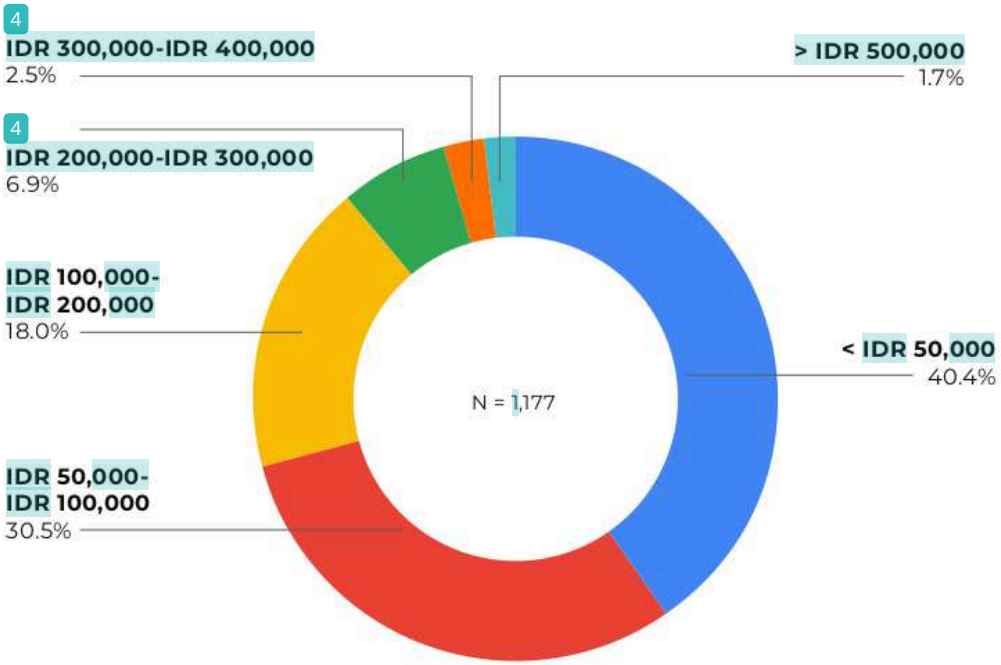
Gen Z's Budget for Subscription

As previously mentioned, subscription fees can be a major factor for Gen Z to choose which media brand they will subscribe to. Data shows, Indonesian Gen Z's budget for subscriptions is relatively small. More than 50% of the respondents are only willing to pay a max IDR 100,000 for subscriptions. With that finding, it is safe to say that Gen Z prefer the lowest tier of subscription plan instead of paying for the premium one.

For reference, the lowest tier of subscription plans on Netflix is IDR 54,000 per month. Meanwhile, the highest tier is IDR 186,000 per month, which will allow its subscribers to access its digital content in 4K Ultra HD Resolution from four different gadgets simultaneosly (Netflix, 2022). Disney + is far cheaper than Netflix as subscribers only need to spend IDR 20,000 per month to access its massive library of content (Clinten, 2020).

The survey's results indicate that Gen Z are wise buyers and financially responsible. Even though their favorite activities in the digital realm are watching online videos and listening to music, they do not force themselves to pay for premium or annual subscription plans.

"Gen Z know what they want and they want to control what they consume and spend. A monthly subscription plan provides that flexibility. Not only it's relatively cheaper (than the transaction-based model), they can consume the content they want," said UMN's researcher and lecturer, Nona Evita.



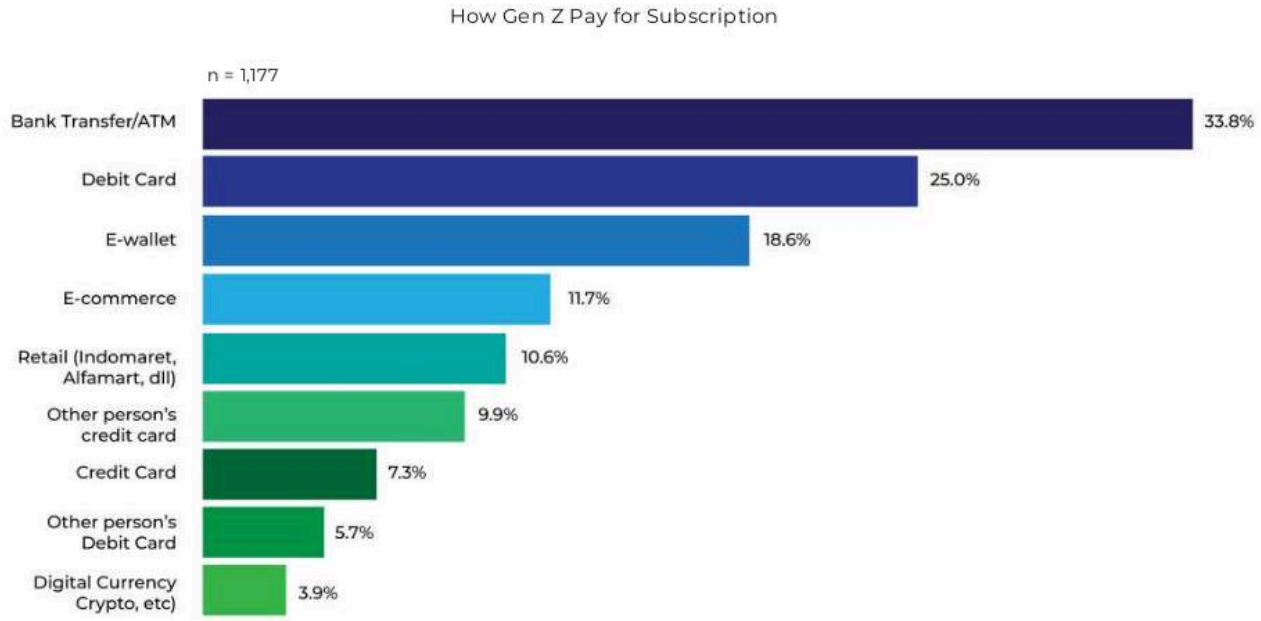
How Gen Z Pay for Subscription

Payment method is an essential part of subscription services and each of Gen Z has their own way of paying subscriptions fee.

Data shows that paying through bank transfer or atm is the most convenient method, with 33.8% of Indonesian Gen Z choosing it. The debit card is the second most convenient method with 25%, followed by e-wallets with 18.6%. What can be concluded from these findings, Gen Z prefer to use conventional methods of payment despite their true digital nature.

"Payment method should not be ignored when you design a subscription plan for Gen Z. Things that you need to consider before implementing a subscription strategy are the user-friendliness, price, and flexibility, even in terms of payment method. While most Gen Z still use bank transfers right now, (trend shows) the payment method will gradually change to e-wallet."

Nona Evita.



What Makes Gen Z Want to Subscribe

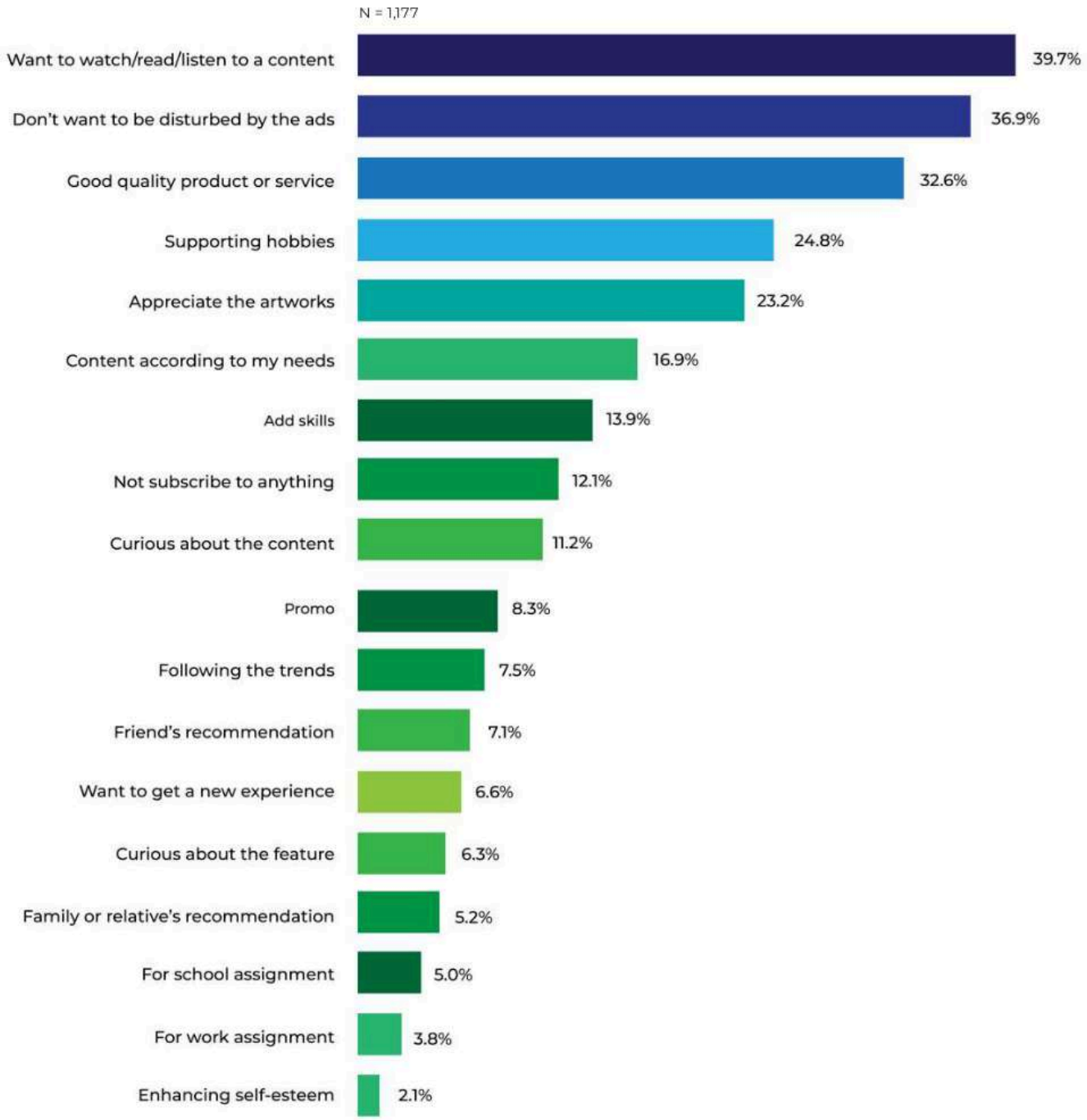
The price of subscription fees could decide whether a Gen Z will subscribe to a particular service or not. The biggest reason they want to subscribe to digital media subscription services is the desire to watch, read, and listen to the content they want. Of 1177 Indonesian Gen Z, 39.7% of them chose it during the research. Following in second and third place are the promise of ad-free content (36.9%) and the quality of the content (32.6%).

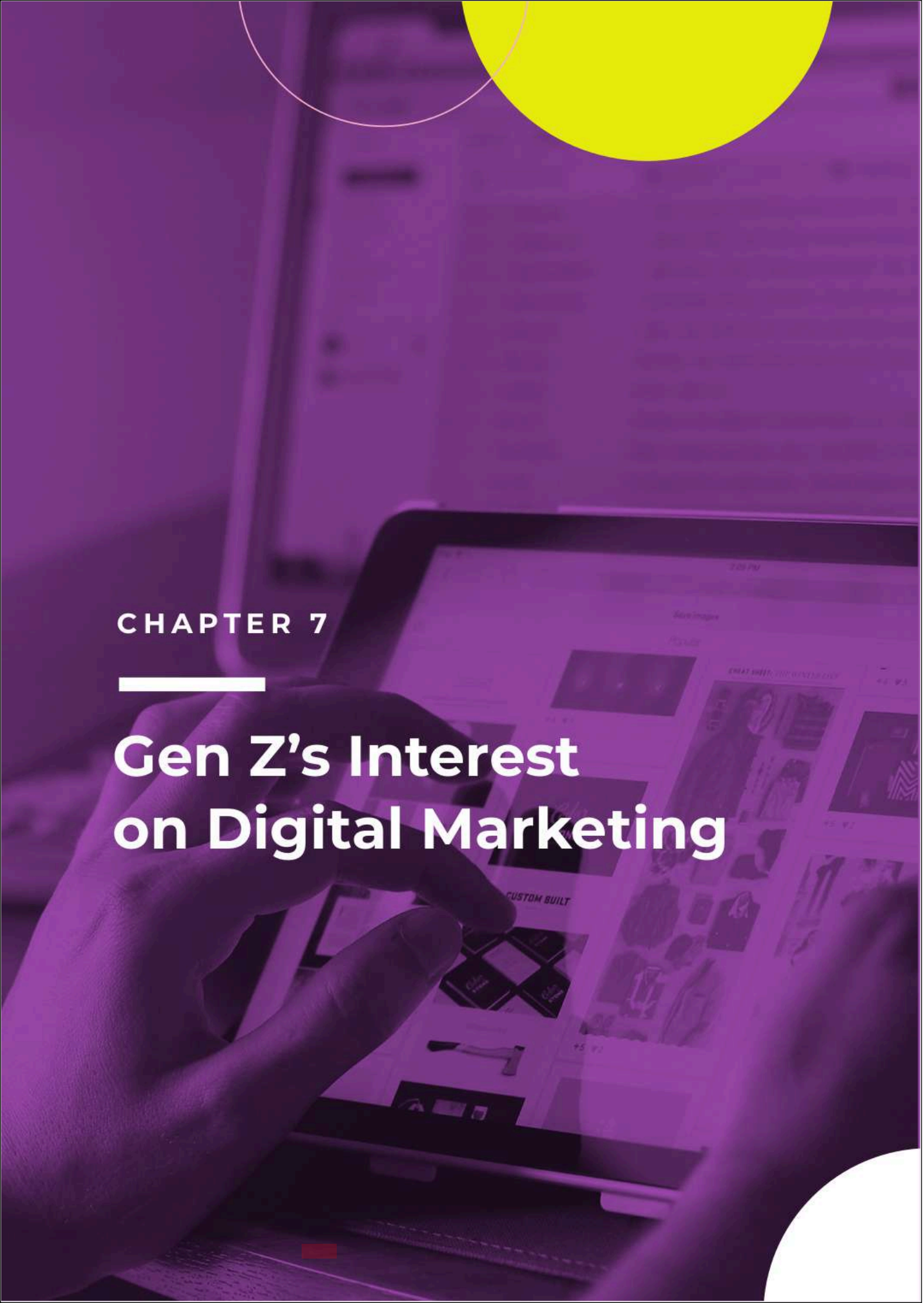
The "ad-free content" reason should be highlighted in this matter. Recently, several media companies have raised their intention to introduce Ad-Supported Subscription Plan. In that plan, ads will appear several times in the content. According to Variety (2022), Disney+ will launch the Ad-Supported Plan in late 2022 and it will be their cheapest subscription plan. Meanwhile, Netflix is still considering whether they will create a similar plan or not (Koblin & Sperling, 2022).

Arguably, if it's realized, the Ad-Supported Plan will affect Gen Z's desire to subscribe. On one side, the Ad Supported Plan could be the cheapest option for them as Gen Z are only ready to spend max IDR 100,000 for subscription. But, on the other side, they need to be ready to be interrupted by ads while consuming content.

"What makes subscription services attractive is that Gen Z can consume any content they want easily and there are no ads. The no-ads feature needs to be highlighted because it allows them to consume a lot of content without any interruptions," said one of UMN's researchers, Rossalyn Asmarantika.

What Makes Gen Z Want to Subscribe





CHAPTER 7

Gen Z's Interest on Digital Marketing

Gen Z spend more than eight hours digitally per day which leads to many brands, including news media, shifting their marketing strategy to the digital realm like social media (PrakashYadav & Rai, 2017). However, the main challenge is not only about how to move to the digital realm, but also how to make sure Gen Z pay attention to their marketing strategies or advertisements. In short, it's important to map Gen Z's digital activities to find the best way to approach them.

The most convenient place to find Gen Z is social media. Mingling, interacting, socializing in social media are also their top 3 activities to do digitally, right before listening to music and watching film or videos. Looking at our data on social media account ownership in third chapter, we see that the majority of Gen Z (Indonesian Gen Z in particular) use Instagram, Whatsapp, Youtube, Line, and TikTok.

According to one of UMN Consulting's researchers, Albertus Magnus Prestianta, brands must also have strong ethics in order to get Gen Z's attention. Gen Z are consumers with a conscience. With a well-educated background and racially diverse generation, brands need to emphasize positive values in their products to get Gen Z's attention.

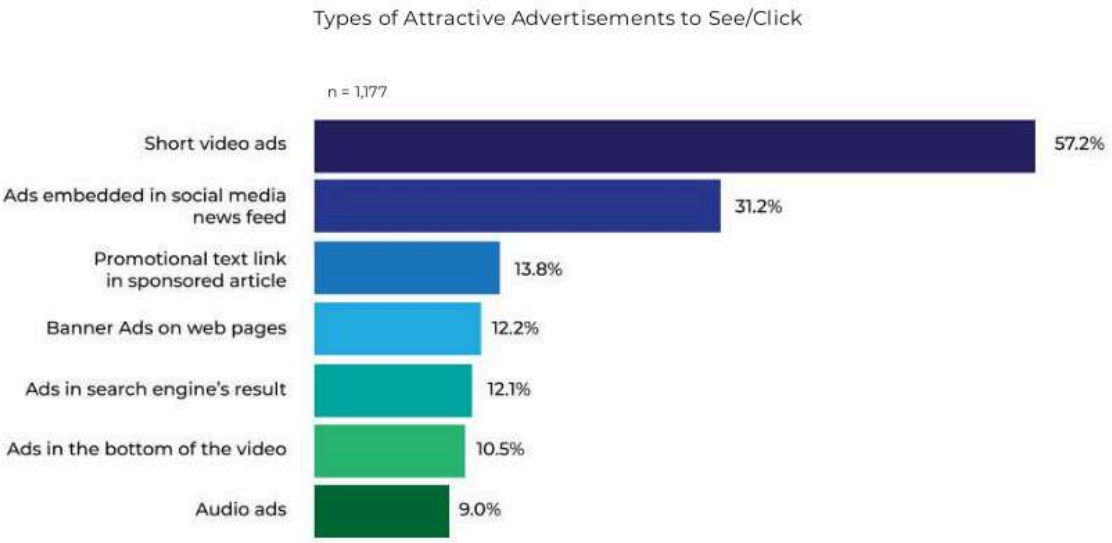
One of the most important ethics for Gen Z is Trust. To be considered trustworthy by Gen Z, it is recommended for brands to establish genuine advertisements, marketings, or campaigns that also have genuine contribution for progressive change (Francis & Hoefel, 2018). As wise buyers and having the ability to do thorough research, Gen Z hate being lied to.

"Gen Z are racially and ethnically diverse. They're well-educated. They care about the welfare of others and the environment. I suggest brands re-check their vision and mission to see if they fit with Gen Z's values. If not, then change it. Be genuine with Gen Z. If brands lie, Gen Z will know," said Albertus.

Types of Attractive Advertisements to See/Click

Looking at the chart below, from 1177 Indonesian Gen Z, 57.2% consider short-video advertisements as attractive to see or click. The second most attractive advertisement to see or click is ads placement on news feed with 31.2%.

It's hard to deny that their interest in short-videos is heavily related to social media. As Gen Z can spend hours in social media, they tend to prefer social-media friendly formats. The short-video, arguably, is social-media friendly as the format allows it to blend in with the other type of contents provided by the platform (Bhanushali, 2021). Furthermore, the format also allows Gen Z to consume it quickly among hundreds of content available in social media.



The short-video format may also have something to do with audiences' shorter attention span. Due to busy lives schedules and wanting to seek entertainment without spending too much time online, short-videos become the answer for that. According to Forbes (2017), Gen Z's attention span is only 8 seconds. As a comparison, Millennials' attention span is 12 seconds.

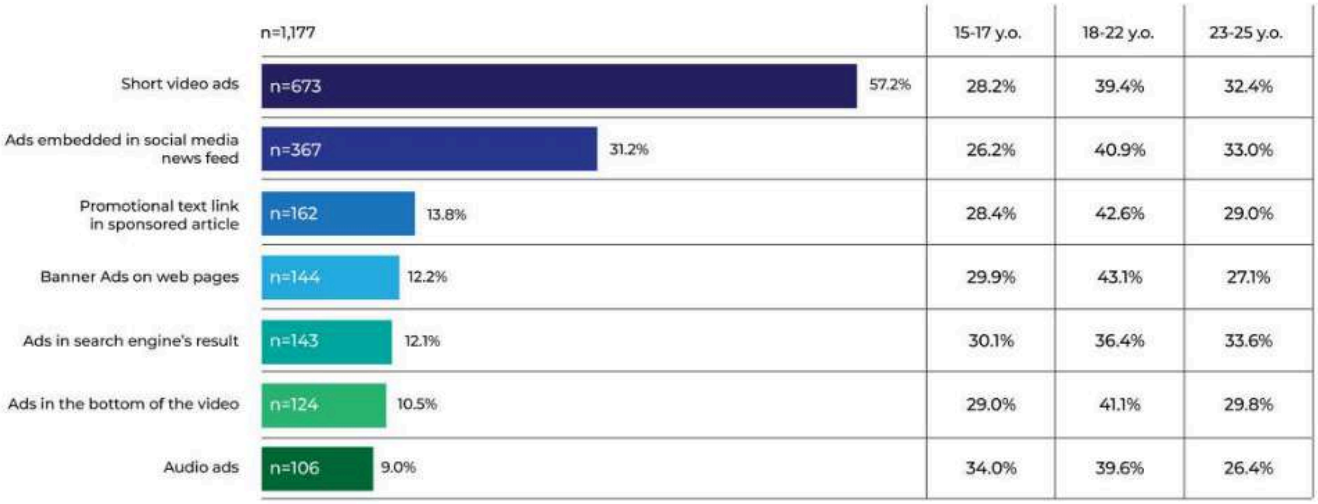
Fortunately, many social media platforms are aware of this phenomenon. They become more and more supportive towards short-video format. Looking back on the last 2 years, one of the social media platforms that gained popularity is TikTok. Launched back in September 2016, TikTok is well known for its short video format. With over 1 billion users, its popularity forced another social media platform (competitor) to be more supportive towards short-videos (Dellatto, 2021).

TikTok roles in digital marketing are something to look at too. For instance, using the hashtag #tiktokmademebuyit, it has 2.3 billion views (Guekjian, 2022). We can see the direct impact on one of the brands that became viral, CeraVe, which grew about 37% between September 2020 and August 2021. With all that info in mind, it is worth recommending again for brands to start crafting their ads in short-video.

Distribution of Attractive Advertisements to See/Click Based on Age

There were 673 Gen Z respondents who chose short-videos as attractive advertisements. In detail, 28.2% of them aged 15-17 years old, 39.4% aged 18-22 years old, and 32.4% aged 23-25 years old. This goes in line with other findings that Gen Z within the age of 18-22 years old are dominating social media such as Instagram and YouTube where short-video advertisements are mostly seen.

Distribution of Attractive advertisement to See/Click Based on Age



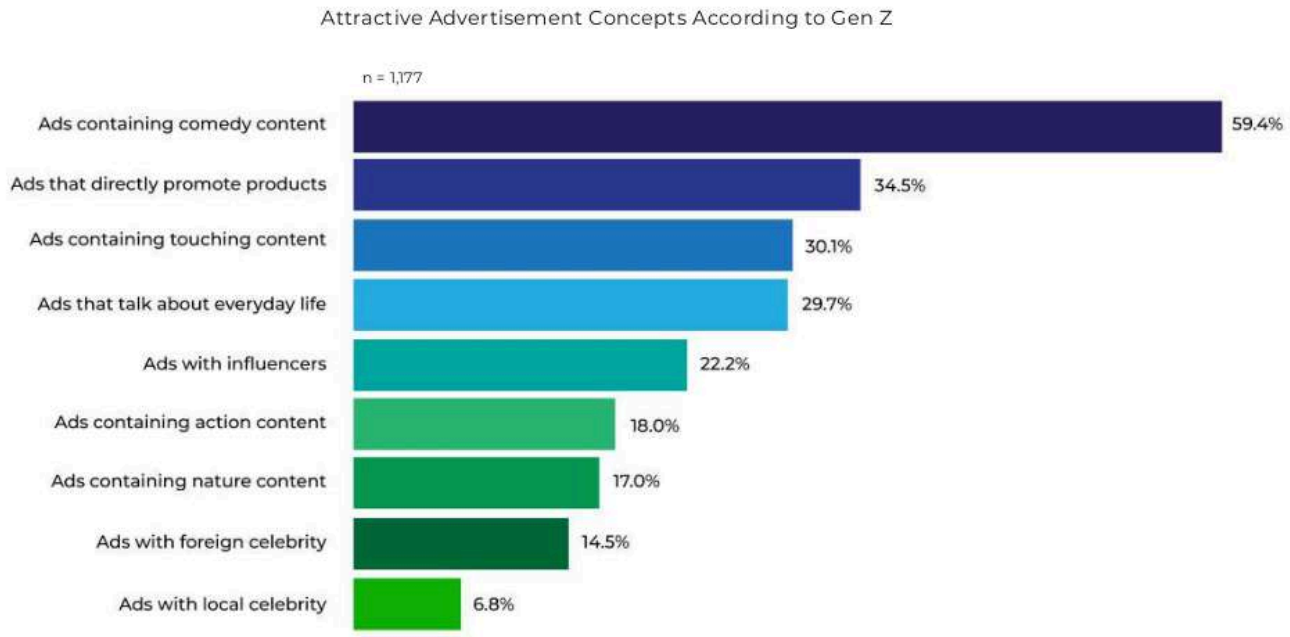
Attractive Advertisement Concepts According to Gen Z

From our initial findings, it is clear that finding entertainment was the main purpose of why Gen Z access digital media. This goes in line with the results of asking them to choose which type of attractive advertisement concepts they like the most. Looking at the result. top three attractive advertisements concepts according to Gen Z are comical (59.4%), straight-forward (34.5%), dan touching (30.1%).

It is evident that Gen Z have their own ideal regarding advertisements that can get their attention. As a generation growing up in the middle of technological advancement, they're quite familiar with various types of multimedia content. Simply put, due to their digital prowess, brands need to incorporate storytelling and aesthetically pleasing visuals (and others such as audio, pictures, and graphics) into their advertisements (Djafarova & Bowes, 2021).

Planning off an advertisement based on the concepts Gen Z consider attractive, brands should also bear in mind the main competitor they have is Gen Z themselves. This correlates with Gen Z's status as not the only one of the main consumers of social media but also as the creator of various (and at times innovative) content.

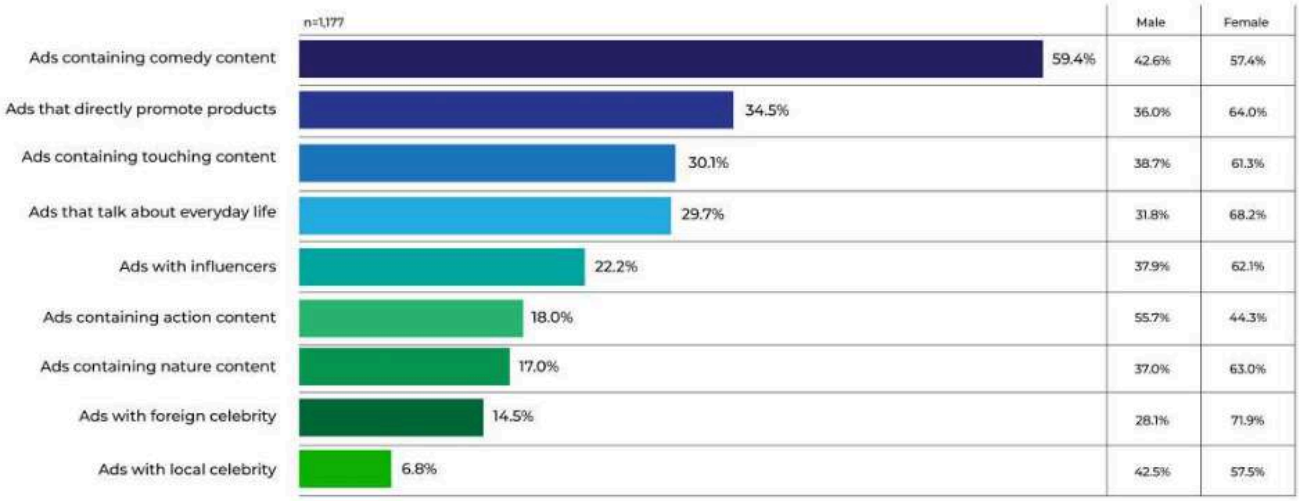
"Brands should remember we normally don't like advertisements since it usually interrupts us in the middle of scrolling or watching something. But I acknowledge there are some advertisements I would be willing to spend time on. I like aesthetically pleasing ads. The ones with good editing, various graphic illustration to support visuals, good camera angles and movements, all packed with concise information in a short amount of time. We also put special interest when ads feel like a movie. That's the only time we tolerate a longer duration," said Leoni Alvionita, Fresh Graduate (22).



Attractive Advertisement Concepts According to Gen Z Based On Gender

Here, we particularly discuss attractive advertisement concepts based on gender. Data shows, female respondents are attracted to almost all different kinds of advertisement concept except for action content.

Regarding action content, male Gen Z dominating with 55.7% compared to female Gen Z with 44,3%. That finding is similar to what Wühr & Schwarz (2016) say that men prefer action content over melodrama and romantic one. Meanwhile, women prefer melodrama and romantic content. As seen from our data, female respondents are attracted to melodrama, touching, or moving content.



Gen Z's View of Advertisement in Digital Media

Based on the survey, 37.6% of Indonesian Gen Z consider advertisements on digital media to be influential for them to know a product. In addition, 31.3% consider an advertisement on social media is somewhat influential in making the decision to recommend whether or not to buy a product.

The key takeaway from this section is remembering Gen Z's traits as a wise buyers. Gen Z grow up during the recession and pandemic. This shapes their mind to only spend money on products with value and quality. Rather than following the trends as the millennials did, Gen Z are frugal before making economic decisions, to avoid purchasing products that they don't need (Young, 2021).

One of our respondents during the research, Dinda Zavira (22), gave interesting habits Gen Z usually do before buying products they see on digital advertisements. First, Gen Z will seek special promos and discounted prices. Then, they will compare the prices they find in online shops to offline shops. They also make sure it comes from official accounts. Third, they will look at the products' ratings and reviews to make sure both of them come from actual consumers. Fourth, they will pay attention to how many products are sold and then ask their friends to get honest reviews.

"I usually go for an online shop that has sold more than 5,000 copies, there's no way they can fake that! And I really pay close attention to ratings and reviews, making sure it comes from authentic consumers by looking at the pictures and videos they posted as their testimony. I don't want to be tricked." said Dinda.

Takeaways and Conclusions

1. Gen Z (Plural) emphasizes self-values that deal with improving others' welfare, tolerance, and the protection of nature. Based on Shalom H. Schwartz, those values are called Universalism and Benevolence, part of Self-Transcendence value.

2. Gen Z also have a particular interest in Self-Enhancement values. It means that other than being selfless and thinking of others, Gen Z also care about their achievements. It may happen due to social media, where everything is being compared.

3. Gen Z have gradually left traditional media. More than 50% of our respondents barely access tabloids, newspapers, magazines, and radio.

4. Gen Z can spend more than 8 hours per day in the digital realm. Their favorite media-related activities in the digital realm are listening to music, watching online videos, socializing on social media, communicating with friends, and online shopping.

5. Several reasons make Gen Z access media products. Those reasons are looking for entertainment, references, and filling spare time. When it comes to "looking for reference", it means academic reference or educational content.

6. Most Gen Z already have social media accounts way before they reach teenagehood. Based on the survey's results, 44.9% of our respondents have had social media for 5-10 years.

7. Gen Z's top five social media are Instagram, Whatsapp, YouTube, Line, and TikTok. Five of them have similar characteristics; one of them is about supporting short videos.

8 Gen Z use social media for communication, finding entertainment, spending their free time, social interaction, and relaxation.

9 According to Gen Z, a person can be considered an Influencer if he/ she has the influential quality and a massive number of followers. In addition, that person also needs to promote something, especially on social media actively.

10 According to Indonesian Gen Z, some of the most popular influencers are Arief Muhammad, Awakarin, Titan Tyra, Maudy Ayunda, and Jerome Polin. They have some similarities, such as a massive number of followers, actively promoting something, and their content mainly contains entertainment, education, tips and trick, and daily vlogs

11 Gen Z's top reasons for following influencers are inspiring content and humorous or entertaining quality. Other than that, Gen Z also follow influencers who have specific skills or abilities and share new knowledge.

12 Rather than relying on traditional media like newspapers, Gen Z find news through social media. That habit makes Gen Z tend to be exposed to news unintentionally.

13 News, according to Gen Z, is information about a current event. Furthermore, Gen Z associate the word with facts, reality, and something whose validity can be verified.

14 When looking for news, Gen Z consider trustworthiness, accuracy, credibility, quality, and updates.

15 Gen Z enjoy news about movies, music, lifestyle, cuisine, and technology. In other words, they want soft news or content related to entertainment and lifestyle.

16 Gen Z are open to subscribing to a subscription service, whether a news subscription or a non-news subscription, such as Netflix and Spotify. However, they prefer monthly subscriptions, and they only want to spend IDR 50,000 - 100,000 per month.

17 The most subscribed brands by Gen Z are Disney+, Joox, Amazon Prime, Youtube, and HBO GO. Their pricing is one of many factors that make Gen Z choose them.

18 Most brands or companies have shifted their attention to digital marketing to target Gen Z, primarily through social media. Gen Z particularly enjoy short video ads, especially those that are comical, straightforward, and heartwarming or touching.

19 In conclusion, Gen Z truly embrace their digital nature by spending most of their time in the digital realm. Social media, which they have owned since they were kids, is their ticket to the digital realm, including most of its content. However, they used social media not only to enter the digital realm and access its content but also to establish or strengthen their personal identity. They cherrypick digital content or service so they don't have to spend their money or attention aimlessly. Hence they are called wise buyers.

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