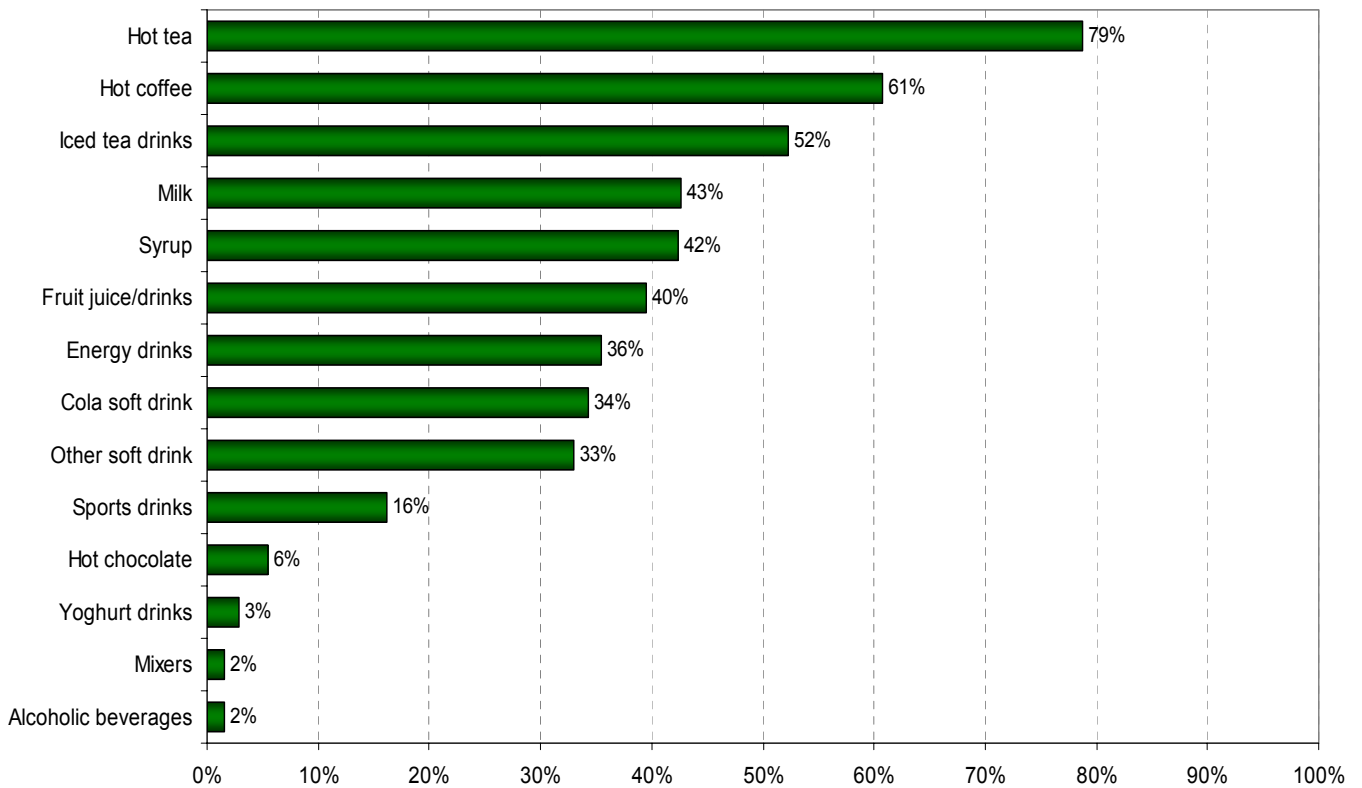


Share-of-Throat across the country

What's Indonesia drinking nowadays? If you exclude water, tea is No1 and bigger than coffee, many of our children are getting their kicks out of energy drinks and only two per cent of grown-ups are imbibing anything alcoholic. That's if you exclude the traditional "anggur" or any homemade spirits. These findings are based on Roy Morgan Single Source, a national survey of over 25,000 respondents annually, covering 90% of Indonesia's population over the age of 14, from both Urban and Rural, including the Top 20 cities.

Beverages Consumption in last 4 weeks

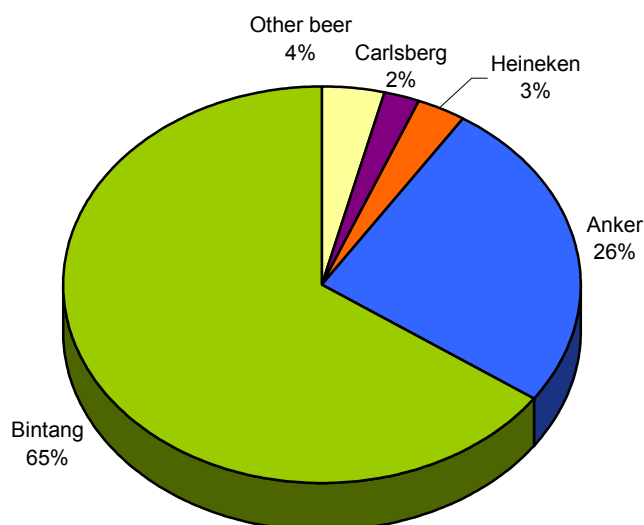


In the country that's famous worldwide for the cup of "Java", hot tea was consumed by 79% of the population in the last seven days. Hot tea rules as the country's most popular beverage also because it's a better companion with meals, for many. Add Iced Teas (52%) to that ritual and hot coffee (61%) becomes an even poorer second in the universally recognised battle of the two popular beverages. What will surprise many is the high level of milk consumption by grown-ups each week, with 43% of the population above the age of 14 actually drinking milk, not just adding it to their coffee. That's more than the ever-popular syrups (42%), or fruit/juice drinks (41%) found in so many Indonesian homes not just at the streetside vendors. Not surprising therefore is the fact that 59 million people bought some form of milk in the last seven days. But about 40 per cent of them were men, shattering the popular myth that it is only the *ibu rumah tangga* that does the grocery shopping. Of the people who bought milk, 46 million bought Sweetened Condensed Milk (SKM), 30 million bought powdered milk and 22 million bought RTDs.

RTD (Ready-to-drink) milks continue to grow as a category, with Danone’s Milkkuat storming the market as a more recent entrant and catapulting to No1 in the popularity polls, if not in volume. Almost 19 million bought the brand last week, followed by brands from Ultra Jaya, Frisian Flag and Indomilk. Another recent phenomenon has of course been the Energy Drinks category. Though it has been around for at least two decades with the likes of Lipovitan, the market expanded dramatically with Extra Joss in the last few years. Today, energy drinks are consumed by at least 36% per cent of people over the age of 14 of whom 29 million people drank Extra Joss in the last seven days.

Another growth category is Fruit Juices and juice-based drinks. With a growing middle class, the consumption of fruit in its varied forms is becoming even more popular. Today, 40% of grown-ups, not just little children, drink a fruit-based drink at least once a week. This is another category where Ultra Jaya are a strong performer, but Frutang leads with 13 million drinkers followed by ABC with 4.6 million and Buavita with 3.6 million happy consumers each week. In the pure juice segment, Berri is building a strong franchise. The same cannot be said for the alcoholic beverages market, where even the consumption of beer remains flat. Only two per cent of the population has had a branded alcoholic beverage in the last seven days. To quell the usual argument about methodology and embarrassing confessions in a predominantly Muslim population, the number of self-confessed alcohol drinkers is far less at 3 million people than the number of self-confessed homosexuals, at 6 million. That’s probably because respondents can answer the most sensitive of questions in confidence and privacy via self-completion, without having verbalise anything to the interviewer present only to assist when asked.

Alcoholic Beverages - Beer Consumption in last 4 weeks



A probable explanation for the slow growth of alcohol consumption in a rapidly ‘globalising’ Indonesia, is the noticeable swelling in the number of “Real Conservatives”. This group in Roy Morgan Values Segments is also growing thanks to young people, not just the older-and-old-fashioned as is often construed. Of all the people who had an alcoholic beverage in the last four weeks, Spirits at 23% outstripped Beer drinkers (16%). Among beer drinkers, Bintang dominates with 77% followed by Anker (30%). It’s the “silly season” and all the year-end partying in metro Indonesia will hopefully add a small spike to these annual averages!

Margin of Error:

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. The following table gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. The figures are approximate and for general guidance only, and assume a simple random sample. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	<u>40-60%</u>	<u>25-75%</u>	<u>10% or 90%</u>	<u>5% or 95%</u>
2000	±2.2	±1.9	±1.3	±1

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For further information:

Debnath Guharoy: Phone: +62 21 572 2021 Email: Debnath.guharoy@roymorgan.com