

Monday, 18 April 2016

## Keyakinan Konsumen Indonesia dari Roy Morgan loncat ke angka 150.6 di bulan Maret; Tertinggi sejak Agustus 2015 (151.5)

Keyakinan Konsumen Indonesia dari Roy Morgan di bulan Maret loncat ke angka 150.6 (naik 3.5 poin persentase). Namun demikian, Keyakinan Konsumen kini 3.5pts lebih rendah dibanding setahun yang lalu di Maret 2015 yaitu 154.1, walaupun hampir 20pts di atas rata-rata jangka panjang (2005-2016) yaitu 131.9.

Sebab utama dari kenaikan keyakinan di bulan ini adalah semakin banyak masyarakat Indonesia yang menyatakan bahwa 'sekarang waktu yang baik untuk membeli' barang rumah tangga yang besar/utama'.

Kini 39% dari masyarakat Indonesia (turun 1ppt) menyatakan bahwa keuangan keluarga mereka kini 'lebih baik' dari setahun yang lalu dibandingkan dengan 10% (naik 2ppt) yang menyatakan keuangan keluarga 'lebih buruk'.

Tambah lagi kini 72% dari masyarakat (naik 4ppt) memperkirakan bahwa keuangan keluarga akan 'lebih baik' di waktu yang sama di tahun depan (**tertinggi untuk indikator ini sejak lebih dari setahun, dari Nopember 2014**) dibandingkan 3% (turun 2ppt) memperkirakan keuangan akan 'lebih buruk' (**kembali ini terendah untuk indikator ini sejak lebih dari setahun, sejak Oktober 2014**).

Dalam hal ekonomi Indonesia kini 80% masyarakat (naik 1ppt) memperkirakan bahwa Indonesia akan mengalami 'masa yang baik' secara finansial selama jangka waktu 12 bulan ke depan dan 20% (turun 1ppt) memperkirakan akan mengalami 'masa yang buruk'.

Tambah lagi, kini 90% masyarakat (naik 1ppt) memperkirakan bahwa ekonomi Indonesia akan mengalami 'masa yang baik' selama lima tahun ke depan dan hanya 10% (tidak berubah) memperkirakan akan mengalami 'masa yang buruk'.

Kini jauh di atas separuh, 57% masyarakat (kenaikan signifikan sebesar 5ppt) menyatakan bahwa 'sekarang waktu yang baik untuk membeli' barang rumah tangga yang mahal (**kembali tertinggi untuk indikator ini sejak setahun dari Maret 2015**), dan 40% (penurunan besar yaitu 6ppt) menyatakan bahwa 'kini waktu yang buruk untuk membeli' barang tersebut (**terendah untuk indikator ini sejak setahun yang lalu pada Maret 2015**).

**Debnath Guharoy, Roy Morgan Regional Director, Asia, menyatakan:**

*"Ini tidak mengejutkan. Sementara dalam tri-wulan terakhir 2015 kunjungan ke mall dan department store menurun, kini tampak kenaikan belanja konsumen pada tri-wulan pertama 2016 ini. Pengeluaran pemerintah pusat maupun daerah dalam bidang infrastruktur memberikan dampak positif pada dompet konsumen di seluruh negeri. Harga BBM yang rendah juga memberikan dampak positif pada harga impor dan ekspor Indonesia".*

Tingkat Keyakinan Konsumen bulanan dari Roy Morgan didasarkan pada wawancara tatap-muka dengan 2,138 responden, di seluruh Indonesia bukan hanya di beberapa kota besar. Survei ini dilakukan di 22 Kota Besar, 22 Kota kecil dan desa di sekitarnya, yang secara statistik mewakili seluruh Indonesia. Laki-laki dan perempuan umur 14 tahun ke atas dipilih secara random selama bulan Maret 2016.

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## **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.

| <b><u>Sample Size</u></b> | <b><u>Percentage Estimate</u></b> |                          |                          |                         |
|---------------------------|-----------------------------------|--------------------------|--------------------------|-------------------------|
|                           | <b><u>40%-60%</u></b>             | <b><u>25% or 75%</u></b> | <b><u>10% or 90%</u></b> | <b><u>5% or 95%</u></b> |
| 1,000                     | ±3.0                              | ±2.7                     | ±1.9                     | ±1.4                    |
| 2,000                     | ±2.2                              | ±1.9                     | ±1.3                     | ±1.0                    |

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Results for the Roy Morgan Indonesian Consumer Confidence Rating\* for the component questions (2005 - 2007) are as follows:

|   | 2005             |              |              |              | 2006         |              |              |              | 2007         |              |              |              |    |    |
|---|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|----|----|
|   | Jan-Mar          | Apr-Jun      | Jul-Sep      | Oct-Dec      | Jan-Mar      | Apr-Jun      | Jul-Sep      | Oct-Dec      | Jan-Mar      | Apr-Jun      | Jul-Sep      | Oct-Dec      |    |    |
| <b>Interviews</b>   | <b>5,707</b>     | <b>6,376</b> | <b>6,362</b> | <b>6,244</b> | <b>6,393</b> | <b>6,233</b> | <b>6,312</b> | <b>6,297</b> | <b>6,685</b> | <b>6,815</b> | <b>6,729</b> | <b>6,758</b> |    |    |
| <b>Q1</b> Would you say you and your family are better off financially or worse off than you were at this time last year?   |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
| Over the <u>past</u> year   | Better off       |              | 23           | 28           | 26           | 20           | 21           | 20           | 20           | 18           | 20           | 16           | 20 |    |
|   | Worse off        |              | 21           | 24           | 26           | 40           | 39           | 37           | 34           | 34           | 36           | 34           | 31 | 30 |
| <b>Question 1 difference</b>  | <b>2</b>         | <b>4</b>     | <b>0</b>     | <b>-20</b>   | <b>-18</b>   | <b>-17</b>   | <b>-14</b>   | <b>-14</b>   | <b>-18</b>   | <b>-14</b>   | <b>-15</b>   | <b>-10</b>   |    |    |
| <b>Q2</b> This time next year, do you and your family expect to be better off financially or worse off than you are now?  |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
|   | Better off       |              | 46           | 49           | 49           | 40           | 41           | 37           | 40           | 38           | 39           | 44           | 45 | 46 |
|   | Worse off        |              | 7            | 5            | 6            | 15           | 16           | 12           | 12           | 9            | 10           | 11           | 10 | 10 |
| <b>Question 2 difference</b>  | <b>39</b>        | <b>44</b>    | <b>43</b>    | <b>25</b>    | <b>25</b>    | <b>25</b>    | <b>28</b>    | <b>29</b>    | <b>29</b>    | <b>33</b>    | <b>35</b>    | <b>36</b>    |    |    |
| <b>Q3</b> Thinking of economic conditions in Indonesia as a whole. In the next 12 months, do you expect we'll have good times financially, bad times or some good and some bad?                                       |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
|   | Good Times       |              | 42           | 45           | 71           | 60           | 62           | 61           | 59           | 65           | 59           | 61           | 60 | 60 |
|   | Bad Times        |              | 18           | 12           | 28           | 39           | 38           | 37           | 40           | 34           | 40           | 38           | 40 | 39 |
| <b>Question 3 difference</b>  | <b>24</b>        | <b>33</b>    | <b>43</b>    | <b>21</b>    | <b>24</b>    | <b>24</b>    | <b>19</b>    | <b>31</b>    | <b>19</b>    | <b>23</b>    | <b>20</b>    | <b>21</b>    |    |    |
| <b>Q4</b> Looking ahead, what would you say it is more likely, that in Indonesia as a whole, we'll have continuous good times during the next five years or so – or we'll have bad times – or some good and some bad? |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
|   | Good times       |              | 51           | 56           | 78           | 79           | 80           | 82           | 81           | 82           | 79           | 80           | 81 | 82 |
|   | Bad times        |              | 12           | 8            | 21           | 21           | 19           | 18           | 18           | 18           | 21           | 20           | 19 | 18 |
| <b>Question 4 difference</b>  | <b>39</b>        | <b>48</b>    | <b>57</b>    | <b>58</b>    | <b>61</b>    | <b>64</b>    | <b>63</b>    | <b>64</b>    | <b>58</b>    | <b>60</b>    | <b>62</b>    | <b>64</b>    |    |    |
| <b>Q5</b> Generally, do you think now is a good time – or a bad time – for people to buy major household items?   |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
|   | Good time to buy |              | 6            | 8            | 25           | 18           | 20           | 22           | 25           | 27           | 27           | 28           | 29 | 35 |
|   | Bad time to buy  |              | 27           | 28           | 72           | 76           | 73           | 71           | 69           | 69           | 68           | 67           | 67 | 61 |
| <b>Question 5 difference</b>  | <b>-21</b>       | <b>-20</b>   | <b>-47</b>   | <b>-58</b>   | <b>-53</b>   | <b>-49</b>   | <b>-44</b>   | <b>-42</b>   | <b>-41</b>   | <b>-39</b>   | <b>-38</b>   | <b>-26</b>   |    |    |
| <b>Roy Morgan Indonesian Consumer Confidence Rating</b>   | <b>116.5</b>     | <b>121.9</b> | <b>119.2</b> | <b>105.2</b> | <b>107.8</b> | <b>109.3</b> | <b>110.4</b> | <b>113.6</b> | <b>109.5</b> | <b>112.7</b> | <b>113.5</b> | <b>116.9</b> |    |    |

\*The Roy Morgan Consumer Confidence Rating is 100.0 plus the simple unweighted average of the difference between the percentage of respondents who give a favourable and those who give unfavourable answers to five key questions.

Results for the Roy Morgan Indonesian Consumer Confidence Rating\* for the component questions (2008 - 2010) are as follows:

|   | 2008             |              |              |              | 2009         |              |              |              | 2010         |              |              |              |    |    |
|---|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|----|----|
|   | Jan-Mar          | Apr-Jun      | Jul-Sep      | Oct-Dec      | Jan-Mar      | Apr-Jun      | Jul-Sep      | Oct-Dec      | Jan-Mar      | Apr-Jun      | Jul-Sep      | Oct-Dec      |    |    |
| <b>Interviews</b>   | <b>6,596</b>     | <b>6,781</b> | <b>6,790</b> | <b>6,777</b> | <b>6,540</b> | <b>6,234</b> | <b>6,269</b> | <b>6,188</b> | <b>6,132</b> | <b>9,196</b> | <b>7,056</b> | <b>6,269</b> |    |    |
| <b>Q1</b> Would you say you and your family are better off financially or worse off than you were at this time last year?   |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
| Over the <u>past</u> year   | Better off       |              | 19           | 18           | 18           | 20           | 20           | 17           | 20           | 21           | 19           | 26           | 28 | 31 |
|   | Worse off        |              | 34           | 42           | 37           | 31           | 29           | 30           | 25           | 26           | 28           | 20           | 19 | 16 |
| <b>Question 1 difference</b>  | <b>-15</b>       | <b>-24</b>   | <b>-19</b>   | <b>-11</b>   | <b>-9</b>    | <b>-13</b>   | <b>-5</b>    | <b>-5</b>    | <b>-9</b>    | <b>6</b>     | <b>9</b>     | <b>15</b>    |    |    |
| <b>Q2</b> This time next year, do you and your family expect to be better off financially or worse off than you are now?  |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
|   | Better off       |              | 44           | 40           | 44           | 47           | 45           | 43           | 44           | 45           | 42           | 41           | 49 | 51 |
|   | Worse off        |              | 14           | 18           | 13           | 8            | 8            | 7            | 6            | 8            | 8            | 6            | 6  | 7  |
| <b>Question 2 difference</b>  | <b>30</b>        | <b>22</b>    | <b>31</b>    | <b>39</b>    | <b>37</b>    | <b>36</b>    | <b>38</b>    | <b>37</b>    | <b>34</b>    | <b>35</b>    | <b>43</b>    | <b>44</b>    |    |    |
| <b>Q3</b> Thinking of economic conditions in Indonesia as a whole. In the next 12 months, do you expect we'll have good times financially, bad times or some good and some bad?                                       |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
|   | Good Times       |              | 53           | 51           | 53           | 58           | 61           | 65           | 67           | 65           | 66           | 74           | 77 | 79 |
|   | Bad Times        |              | 47           | 49           | 47           | 42           | 39           | 35           | 33           | 35           | 34           | 25           | 22 | 20 |
| <b>Question 3 difference</b>  | <b>6</b>         | <b>2</b>     | <b>6</b>     | <b>16</b>    | <b>22</b>    | <b>30</b>    | <b>34</b>    | <b>30</b>    | <b>32</b>    | <b>49</b>    | <b>55</b>    | <b>59</b>    |    |    |
| <b>Q4</b> Looking ahead, what would you say it is more likely, that in Indonesia as a whole, we'll have continuous good times during the next five years or so – or we'll have bad times – or some good and some bad? |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
|   | Good times       |              | 76           | 73           | 77           | 85           | 84           | 85           | 87           | 88           | 88           | 88           | 87 | 89 |
|   | Bad times        |              | 24           | 27           | 23           | 15           | 16           | 14           | 13           | 11           | 12           | 11           | 12 | 10 |
| <b>Question 4 difference</b>  | <b>52</b>        | <b>46</b>    | <b>54</b>    | <b>70</b>    | <b>68</b>    | <b>71</b>    | <b>74</b>    | <b>77</b>    | <b>76</b>    | <b>77</b>    | <b>75</b>    | <b>79</b>    |    |    |
| <b>Q5</b> Generally, do you think now is a good time – or a bad time – for people to buy major household items?   |                  |              |              |              |              |              |              |              |              |              |              |              |    |    |
|   | Good time to buy |              | 35           | 31           | 32           | 31           | 34           | 36           | 35           | 40           | 36           | 38           | 37 | 39 |
|   | Bad time to buy  |              | 62           | 67           | 66           | 67           | 65           | 62           | 63           | 58           | 61           | 58           | 58 | 54 |
| <b>Question 5 difference</b>  | <b>-27</b>       | <b>-36</b>   | <b>-34</b>   | <b>-36</b>   | <b>-31</b>   | <b>-26</b>   | <b>-28</b>   | <b>-18</b>   | <b>-25</b>   | <b>-20</b>   | <b>-21</b>   | <b>-15</b>   |    |    |
| <b>Roy Morgan Indonesian Consumer Confidence Rating</b>   | <b>109.4</b>     | <b>102.0</b> | <b>107.6</b> | <b>116.0</b> | <b>117.4</b> | <b>119.4</b> | <b>122.4</b> | <b>124.3</b> | <b>121.6</b> | <b>131.3</b> | <b>132.3</b> | <b>137.0</b> |    |    |

\*The Roy Morgan Consumer Confidence Rating is 100.0 plus the simple unweighted average of the difference between the percentage of respondents who give a favourable and those who give unfavourable answers to five key questions.

Results for the Roy Morgan Indonesian Consumer Confidence Rating\* for the component questions (2011) are as follows:

|   | 2011             |              |              |              |              |              |              |              |              |              |              |              |              |
|---|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|   | Jan              | Feb          | Mar          | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct          | Nov          | Dec          |              |
| <b>Interviews</b>   | <b>2,090</b>     | <b>2,084</b> | <b>2,080</b> | <b>2,059</b> | <b>2,091</b> | <b>2,090</b> | <b>2,062</b> | <b>2,029</b> | <b>2,020</b> | <b>2,091</b> | <b>2,088</b> | <b>2,089</b> |              |
| <b>Q1</b> Would you say you and your family are better off financially or worse off than you were at this time last year?   |                  |              |              |              |              |              |              |              |              |              |              |              |              |
| Over the <u>past</u> year   | Better off       | 33           | 28           | 31           | 34           | 37           | 37           | 36           | 36           | 36           | 38           | 38           | 38           |
|   | Worse off        | 13           | 13           | 15           | 13           | 13           | 13           | 12           | 14           | 12           | 11           | 12           | 14           |
| <b>Question 1 difference</b>  |                  | <b>20</b>    | <b>15</b>    | <b>16</b>    | <b>21</b>    | <b>24</b>    | <b>24</b>    | <b>24</b>    | <b>22</b>    | <b>24</b>    | <b>27</b>    | <b>26</b>    | <b>24</b>    |
| <b>Q2</b> This time next year, do you and your family expect to be better off financially or worse off than you are now?  |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Better off       | 53           | 50           | 53           | 53           | 53           | 52           | 51           | 54           | 56           | 55           | 57           | 55           |
|   | Worse off        | 5            | 5            | 5            | 6            | 6            | 5            | 5            | 6            | 3            | 3            | 2            | 5            |
| <b>Question 2 difference</b>  |                  | <b>48</b>    | <b>45</b>    | <b>48</b>    | <b>47</b>    | <b>47</b>    | <b>47</b>    | <b>46</b>    | <b>48</b>    | <b>53</b>    | <b>52</b>    | <b>55</b>    | <b>50</b>    |
| <b>Q3</b> Thinking of economic conditions in Indonesia as a whole. In the next 12 months, do you expect we'll have good times financially, bad times or some good and some bad?                                       |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good Times       | 80           | 82           | 81           | 80           | 81           | 83           | 81           | 79           | 84           | 83           | 80           | 82           |
|   | Bad Times        | 20           | 18           | 19           | 20           | 18           | 17           | 18           | 21           | 16           | 17           | 19           | 18           |
| <b>Question 3 difference</b>  |                  | <b>60</b>    | <b>64</b>    | <b>62</b>    | <b>60</b>    | <b>63</b>    | <b>66</b>    | <b>63</b>    | <b>58</b>    | <b>68</b>    | <b>66</b>    | <b>61</b>    | <b>64</b>    |
| <b>Q4</b> Looking ahead, what would you say it is more likely, that in Indonesia as a whole, we'll have continuous good times during the next five years or so – or we'll have bad times – or some good and some bad? |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good times       | 88           | 89           | 88           | 90           | 89           | 89           | 89           | 88           | 91           | 90           | 88           | 89           |
|   | Bad times        | 12           | 10           | 11           | 10           | 11           | 11           | 10           | 12           | 8            | 10           | 12           | 11           |
| <b>Question 4 difference</b>  |                  | <b>76</b>    | <b>79</b>    | <b>77</b>    | <b>80</b>    | <b>78</b>    | <b>78</b>    | <b>79</b>    | <b>76</b>    | <b>83</b>    | <b>80</b>    | <b>76</b>    | <b>78</b>    |
| <b>Q5</b> Generally, do you think now is a good time – or a bad time – for people to buy major household items?   |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good time to buy | 43           | 43           | 42           | 50           | 50           | 50           | 49           | 53           | 51           | 54           | 52           | 57           |
|   | Bad time to buy  | 53           | 52           | 54           | 45           | 46           | 45           | 46           | 43           | 45           | 42           | 44           | 41           |
| <b>Question 5 difference</b>  |                  | <b>-10</b>   | <b>-9</b>    | <b>-12</b>   | <b>5</b>     | <b>4</b>     | <b>5</b>     | <b>3</b>     | <b>10</b>    | <b>6</b>     | <b>12</b>    | <b>8</b>     | <b>16</b>    |
| <b>Roy Morgan Indonesian Consumer Confidence Rating</b>   |                  | <b>138.9</b> | <b>138.8</b> | <b>138.1</b> | <b>142.6</b> | <b>143.2</b> | <b>143.9</b> | <b>142.9</b> | <b>142.8</b> | <b>146.8</b> | <b>147.3</b> | <b>145.2</b> | <b>146.5</b> |

\*The Roy Morgan Consumer Confidence Rating is 100.0 plus the simple unweighted average of the difference between the percentage of respondents who give a favourable and those who give unfavourable answers to five key questions.

Results for the Roy Morgan Indonesian Consumer Confidence Rating\* for the component questions (2012) are as follows:

|   | 2012             |              |              |              |              |              |              |              |              |              |              |              |              |
|---|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|   | Jan              | Feb          | Mar          | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct          | Nov          | Dec          |              |
| <b>Interviews</b>   | <b>2,092</b>     | <b>2,106</b> | <b>2,106</b> | <b>2,004</b> | <b>2,107</b> | <b>1,994</b> | <b>1,988</b> | <b>2,095</b> | <b>2,102</b> | <b>2,078</b> | <b>2,069</b> | <b>2,107</b> |              |
| <b>Q1</b> Would you say you and your family are better off financially or worse off than you were at this time last year?   |                  |              |              |              |              |              |              |              |              |              |              |              |              |
| Over the <u>past</u> year   | Better off       | 41           | 37           | 40           | 37           | 43           | 41           | 46           | 41           | 42           | 44           | 42           | 44           |
|   | Worse off        | 12           | 18           | 17           | 16           | 13           | 12           | 12           | 14           | 13           | 11           | 10           | 11           |
| <b>Question 1 difference</b>  |                  | <b>29</b>    | <b>19</b>    | <b>23</b>    | <b>21</b>    | <b>30</b>    | <b>29</b>    | <b>34</b>    | <b>27</b>    | <b>29</b>    | <b>33</b>    | <b>32</b>    | <b>33</b>    |
| <b>Q2</b> This time next year, do you and your family expect to be better off financially or worse off than you are now?  |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Better off       | 59           | 54           | 60           | 59           | 62           | 60           | 67           | 64           | 67           | 66           | 67           | 67           |
|   | Worse off        | 3            | 7            | 5            | 4            | 5            | 5            | 4            | 4            | 3            | 4            | 2            | 3            |
| <b>Question 2 difference</b>  |                  | <b>56</b>    | <b>47</b>    | <b>55</b>    | <b>55</b>    | <b>57</b>    | <b>55</b>    | <b>63</b>    | <b>60</b>    | <b>64</b>    | <b>62</b>    | <b>65</b>    | <b>64</b>    |
| <b>Q3</b> Thinking of economic conditions in Indonesia as a whole. In the next 12 months, do you expect we'll have good times financially, bad times or some good and some bad?                                       |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good Times       | 79           | 74           | 75           | 73           | 76           | 79           | 79           | 78           | 79           | 80           | 82           | 80           |
|   | Bad Times        | 20           | 26           | 25           | 26           | 23           | 20           | 20           | 20           | 21           | 20           | 17           | 19           |
| <b>Question 3 difference</b>  |                  | <b>59</b>    | <b>48</b>    | <b>50</b>    | <b>47</b>    | <b>53</b>    | <b>59</b>    | <b>59</b>    | <b>58</b>    | <b>58</b>    | <b>60</b>    | <b>65</b>    | <b>61</b>    |
| <b>Q4</b> Looking ahead, what would you say it is more likely, that in Indonesia as a whole, we'll have continuous good times during the next five years or so – or we'll have bad times – or some good and some bad? |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good times       | 87           | 82           | 87           | 84           | 86           | 88           | 89           | 90           | 87           | 88           | 92           | 90           |
|   | Bad times        | 12           | 17           | 13           | 15           | 13           | 12           | 11           | 10           | 12           | 12           | 8            | 10           |
| <b>Question 4 difference</b>  |                  | <b>75</b>    | <b>65</b>    | <b>74</b>    | <b>69</b>    | <b>73</b>    | <b>76</b>    | <b>78</b>    | <b>80</b>    | <b>75</b>    | <b>76</b>    | <b>84</b>    | <b>80</b>    |
| <b>Q5</b> Generally, do you think now is a good time – or a bad time – for people to buy major household items?   |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good time to buy | 56           | 51           | 53           | 50           | 56           | 50           | 57           | 54           | 55           | 58           | 61           | 59           |
|   | Bad time to buy  | 40           | 46           | 43           | 44           | 40           | 44           | 38           | 42           | 40           | 36           | 34           | 37           |
| <b>Question 5 difference</b>  |                  | <b>16</b>    | <b>5</b>     | <b>10</b>    | <b>6</b>     | <b>16</b>    | <b>6</b>     | <b>19</b>    | <b>12</b>    | <b>15</b>    | <b>22</b>    | <b>27</b>    | <b>22</b>    |
| <b>Roy Morgan Indonesian Consumer Confidence Rating</b>   |                  | <b>147.0</b> | <b>136.8</b> | <b>142.5</b> | <b>139.6</b> | <b>145.8</b> | <b>145.2</b> | <b>150.5</b> | <b>147.5</b> | <b>148.1</b> | <b>150.6</b> | <b>154.5</b> | <b>152.0</b> |

\*The Roy Morgan Consumer Confidence Rating is 100.0 plus the simple unweighted average of the difference between the percentage of respondents who give a favourable and those who give unfavourable answers to five key questions.

Results for the Roy Morgan Indonesian Consumer Confidence Rating\* for the component questions (2013) are as follows:

|   |                  | 2013         |              |              |              |              |              |              |              |              |              |              |              |
|---|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|   |                  | Jan          | Feb          | Mar          | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct          | Nov          | Dec          |
| <b>Interviews</b>   |                  | <b>2,035</b> | <b>1,939</b> | <b>2,011</b> | <b>2,049</b> | <b>2,127</b> | <b>2,004</b> | <b>2,131</b> | <b>2,051</b> | <b>2,150</b> | <b>2,032</b> | <b>2,029</b> | <b>2,144</b> |
| <b>Q1</b> Would you say you and your family are better off financially or worse off than you were at this time last year?   |                  |              |              |              |              |              |              |              |              |              |              |              |              |
| Over the <u>past</u> year   | Better off       | 49           | 46           | 45           | 44           | 48           | 47           | 43           | 46           | 45           | 41           | 44           | 42           |
|   | Worse off        | 8            | 10           | 11           | 9            | 10           | 11           | 13           | 11           | 12           | 11           | 11           | 12           |
| <b>Question 1 difference</b>  |                  | <b>41</b>    | <b>36</b>    | <b>34</b>    | <b>35</b>    | <b>38</b>    | <b>36</b>    | <b>30</b>    | <b>35</b>    | <b>33</b>    | <b>30</b>    | <b>33</b>    | <b>30</b>    |
| <b>Q2</b> This time next year, do you and your family expect to be better off financially or worse off than you are now?  |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Better off       | 72           | 71           | 69           | 69           | 71           | 71           | 68           | 72           | 69           | 72           | 71           | 72           |
|   | Worse off        | 2            | 2            | 3            | 3            | 3            | 3            | 3            | 3            | 3            | 4            | 4            | 4            |
| <b>Question 2 difference</b>  |                  | <b>70</b>    | <b>69</b>    | <b>66</b>    | <b>66</b>    | <b>68</b>    | <b>68</b>    | <b>65</b>    | <b>69</b>    | <b>66</b>    | <b>68</b>    | <b>67</b>    | <b>68</b>    |
| <b>Q3</b> Thinking of economic conditions in Indonesia as a whole. In the next 12 months, do you expect we'll have good times financially, bad times or some good and some bad?                                       |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good Times       | 83           | 82           | 81           | 80           | 84           | 79           | 77           | 76           | 78           | 78           | 83           | 79           |
|   | Bad Times        | 16           | 18           | 18           | 20           | 16           | 21           | 22           | 23           | 21           | 22           | 16           | 20           |
| <b>Question 3 difference</b>  |                  | <b>67</b>    | <b>64</b>    | <b>63</b>    | <b>60</b>    | <b>68</b>    | <b>58</b>    | <b>55</b>    | <b>53</b>    | <b>57</b>    | <b>56</b>    | <b>67</b>    | <b>59</b>    |
| <b>Q4</b> Looking ahead, what would you say it is more likely, that in Indonesia as a whole, we'll have continuous good times during the next five years or so – or we'll have bad times – or some good and some bad? |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good times       | 93           | 90           | 88           | 91           | 91           | 89           | 88           | 87           | 91           | 90           | 90           | 89           |
|   | Bad times        | 7            | 10           | 11           | 8            | 8            | 10           | 11           | 13           | 9            | 10           | 10           | 11           |
| <b>Question 4 difference</b>  |                  | <b>86</b>    | <b>80</b>    | <b>77</b>    | <b>83</b>    | <b>83</b>    | <b>79</b>    | <b>77</b>    | <b>74</b>    | <b>82</b>    | <b>80</b>    | <b>80</b>    | <b>78</b>    |
| <b>Q5</b> Generally, do you think now is a good time – or a bad time – for people to buy major household items?   |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good time to buy | 63           | 61           | 56           | 65           | 58           | 56           | 54           | 57           | 54           | 53           | 60           | 58           |
|   | Bad time to buy  | 33           | 33           | 37           | 31           | 36           | 40           | 42           | 40           | 41           | 42           | 36           | 39           |
| <b>Question 5 difference</b>  |                  | <b>30</b>    | <b>28</b>    | <b>19</b>    | <b>34</b>    | <b>22</b>    | <b>16</b>    | <b>12</b>    | <b>17</b>    | <b>13</b>    | <b>11</b>    | <b>24</b>    | <b>19</b>    |
| <b>Roy Morgan Indonesian Consumer Confidence Rating</b>   |                  | <b>158.7</b> | <b>155.5</b> | <b>151.9</b> | <b>155.6</b> | <b>155.9</b> | <b>151.5</b> | <b>147.7</b> | <b>149.5</b> | <b>150.2</b> | <b>149.0</b> | <b>154.3</b> | <b>151.0</b> |

\*The Roy Morgan Consumer Confidence Rating is 100.0 plus the simple unweighted average of the difference between the percentage of respondents who give a favourable and those who give unfavourable answers to five key questions.



Results for the Roy Morgan Indonesian Consumer Confidence Rating\* for the component questions (2014) are as follows:

|   | 2014             |              |              |              |              |              |              |              |              |              |              |              |              |
|---|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|   | Jan              | Feb          | Mar          | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct          | Nov          | Dec          |              |
| <b>Interviews</b>   | <b>2,010</b>     | <b>1,934</b> | <b>2,100</b> | <b>2,067</b> | <b>2,024</b> | <b>1,973</b> | <b>2,144</b> | <b>2,138</b> | <b>1,891</b> | <b>1,700</b> | <b>1,699</b> | <b>1,741</b> |              |
| <b>Q1</b> Would you say you and your family are better off financially or worse off than you were at this time last year?   |                  |              |              |              |              |              |              |              |              |              |              |              |              |
| Over the <u>past</u> year   | Better off       | 43           | 42           | 44           | 44           | 47           | 44           | 44           | 47           | 47           | 47           | 50           | 40           |
|   | Worse off        | 11           | 12           | 12           | 10           | 11           | 10           | 8            | 6            | 8            | 8            | 9            | 12           |
| <b>Question 1 difference</b>  |                  | <b>32</b>    | <b>30</b>    | <b>32</b>    | <b>34</b>    | <b>36</b>    | <b>34</b>    | <b>36</b>    | <b>41</b>    | <b>39</b>    | <b>39</b>    | <b>41</b>    | <b>28</b>    |
| <b>Q2</b> This time next year, do you and your family expect to be better off financially or worse off than you are now?  |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Better off       | 70           | 71           | 71           | 68           | 74           | 73           | 72           | 72           | 74           | 74           | 75           | 69           |
|   | Worse off        | 4            | 5            | 4            | 4            | 3            | 2            | 2            | 2            | 2            | 2            | 3            | 4            |
| <b>Question 2 difference</b>  |                  | <b>66</b>    | <b>66</b>    | <b>67</b>    | <b>64</b>    | <b>71</b>    | <b>71</b>    | <b>70</b>    | <b>70</b>    | <b>72</b>    | <b>72</b>    | <b>72</b>    | <b>65</b>    |
| <b>Q3</b> Thinking of economic conditions in Indonesia as a whole. In the next 12 months, do you expect we'll have good times financially, bad times or some good and some bad?                                       |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good Times       | 79           | 82           | 79           | 82           | 85           | 86           | 85           | 87           | 87           | 83           | 88           | 84           |
|   | Bad Times        | 20           | 17           | 20           | 17           | 14           | 13           | 14           | 13           | 13           | 16           | 11           | 16           |
| <b>Question 3 difference</b>  |                  | <b>59</b>    | <b>65</b>    | <b>59</b>    | <b>65</b>    | <b>71</b>    | <b>73</b>    | <b>71</b>    | <b>74</b>    | <b>74</b>    | <b>67</b>    | <b>77</b>    | <b>68</b>    |
| <b>Q4</b> Looking ahead, what would you say it is more likely, that in Indonesia as a whole, we'll have continuous good times during the next five years or so – or we'll have bad times – or some good and some bad? |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good times       | 90           | 90           | 88           | 88           | 91           | 94           | 93           | 94           | 94           | 92           | 94           | 92           |
|   | Bad times        | 10           | 10           | 12           | 12           | 8            | 6            | 6            | 6            | 5            | 7            | 6            | 8            |
| <b>Question 4 difference</b>  |                  | <b>80</b>    | <b>80</b>    | <b>76</b>    | <b>76</b>    | <b>83</b>    | <b>88</b>    | <b>87</b>    | <b>88</b>    | <b>89</b>    | <b>85</b>    | <b>88</b>    | <b>84</b>    |
| <b>Q5</b> Generally, do you think now is a good time – or a bad time – for people to buy major household items?   |                  |              |              |              |              |              |              |              |              |              |              |              |              |
|   | Good time to buy | 58           | 59           | 57           | 59           | 62           | 62           | 61           | 65           | 64           | 62           | 63           | 56           |
|   | Bad time to buy  | 38           | 38           | 38           | 37           | 35           | 35           | 36           | 31           | 32           | 34           | 34           | 41           |
| <b>Question 5 difference</b>  |                  | <b>20</b>    | <b>21</b>    | <b>19</b>    | <b>22</b>    | <b>27</b>    | <b>27</b>    | <b>25</b>    | <b>34</b>    | <b>32</b>    | <b>28</b>    | <b>29</b>    | <b>15</b>    |
| <b>Roy Morgan Indonesian Consumer Confidence Rating</b>   |                  | <b>151.5</b> | <b>152.5</b> | <b>150.6</b> | <b>152.2</b> | <b>157.6</b> | <b>158.6</b> | <b>157.7</b> | <b>161.4</b> | <b>161.2</b> | <b>158.1</b> | <b>161.4</b> | <b>152.0</b> |

\*The Roy Morgan Consumer Confidence Rating is 100.0 plus the simple unweighted average of the difference between the percentage of respondents who give a favourable and those who give unfavourable answers to five key questions.

Results for the Roy Morgan Indonesian Consumer Confidence Rating\* for the component questions (2015) are as follows:

|   | 2015             |              |              |              |              |              |              |              |              |              |              |              |
|---|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|   | Jan              | Feb          | Mar          | Apr          | May          | Jun          | Jul          | Aug          | Sep          | Oct          | Nov          | Dec          |
| <b>Interviews</b>   | <b>1,700</b>     | <b>1,700</b> | <b>1,700</b> | <b>1,700</b> | <b>1,700</b> | <b>1,700</b> | <b>1,699</b> | <b>1,699</b> | <b>1,699</b> | <b>1,699</b> | <b>1,700</b> | <b>1,700</b> |
| <b>Q1</b> Would you say you and your family are better off financially or worse off than you were at this time last year?   |                  |              |              |              |              |              |              |              |              |              |              |              |
| Over the <u>past</u> year   | Better off       | 38           | 40           | 43           | 38           | 43           | 42           | 41           | 42           | 38           | 37           | 37           |
|   | Worse off        | 10           | 13           | 11           | 12           | 11           | 12           | 12           | 12           | 12           | 15           | 13           |
| <b>Question 1 difference</b>  |                  | <b>28</b>    | <b>27</b>    | <b>32</b>    | <b>26</b>    | <b>32</b>    | <b>30</b>    | <b>29</b>    | <b>30</b>    | <b>26</b>    | <b>22</b>    | <b>24</b>    |
| <b>Q2</b> This time next year, do you and your family expect to be better off financially or worse off than you are now?  |                  |              |              |              |              |              |              |              |              |              |              |              |
|   | Better off       | 67           | 69           | 71           | 66           | 71           | 67           | 68           | 69           | 64           | 67           | 68           |
|   | Worse off        | 4            | 4            | 4            | 3            | 4            | 4            | 4            | 5            | 5            | 5            | 6            |
| <b>Question 2 difference</b>  |                  | <b>63</b>    | <b>65</b>    | <b>67</b>    | <b>63</b>    | <b>67</b>    | <b>63</b>    | <b>64</b>    | <b>64</b>    | <b>59</b>    | <b>62</b>    | <b>63</b>    |
| <b>Q3</b> Thinking of economic conditions in Indonesia as a whole. In the next 12 months, do you expect we'll have good times financially, bad times or some good and some bad?                                       |                  |              |              |              |              |              |              |              |              |              |              |              |
|   | Good Times       | 85           | 88           | 85           | 77           | 83           | 84           | 84           | 84           | 76           | 77           | 78           |
|   | Bad Times        | 14           | 12           | 15           | 23           | 17           | 16           | 16           | 16           | 24           | 23           | 22           |
| <b>Question 3 difference</b>  |                  | <b>71</b>    | <b>76</b>    | <b>70</b>    | <b>54</b>    | <b>66</b>    | <b>68</b>    | <b>68</b>    | <b>68</b>    | <b>52</b>    | <b>54</b>    | <b>56</b>    |
| <b>Q4</b> Looking ahead, what would you say it is more likely, that in Indonesia as a whole, we'll have continuous good times during the next five years or so – or we'll have bad times – or some good and some bad? |                  |              |              |              |              |              |              |              |              |              |              |              |
|   | Good times       | 93           | 93           | 91           | 88           | 90           | 90           | 90           | 90           | 88           | 88           | 89           |
|   | Bad times        | 6            | 7            | 8            | 12           | 9            | 9            | 10           | 10           | 12           | 12           | 11           |
| <b>Question 4 difference</b>  |                  | <b>87</b>    | <b>86</b>    | <b>83</b>    | <b>76</b>    | <b>81</b>    | <b>81</b>    | <b>80</b>    | <b>80</b>    | <b>76</b>    | <b>76</b>    | <b>78</b>    |
| <b>Q5</b> Generally, do you think now is a good time – or a bad time – for people to buy major household items?   |                  |              |              |              |              |              |              |              |              |              |              |              |
|   | Good time to buy | 58           | 57           | 58           | 53           | 56           | 55           | 56           | 57           | 50           | 50           | 48           |
|   | Bad time to buy  | 39           | 41           | 39           | 44           | 41           | 41           | 42           | 41           | 47           | 48           | 48           |
| <b>Question 5 difference</b>  |                  | <b>19</b>    | <b>16</b>    | <b>19</b>    | <b>9</b>     | <b>15</b>    | <b>14</b>    | <b>14</b>    | <b>16</b>    | <b>3</b>     | <b>2</b>     | <b>0</b>     |
| <b>Roy Morgan Indonesian Consumer Confidence Rating</b>   |                  | <b>153.6</b> | <b>154.1</b> | <b>154.1</b> | <b>145.6</b> | <b>152.2</b> | <b>151.2</b> | <b>150.9</b> | <b>151.5</b> | <b>143.2</b> | <b>143.2</b> | <b>144.2</b> |

\*The Roy Morgan Consumer Confidence Rating is 100.0 plus the simple unweighted average of the difference between the percentage of respondents who give a favourable and those who give unfavourable answers to five key questions.

Results for the Roy Morgan Indonesian Consumer Confidence Rating\* for the component questions (2016) are as follows:

|   | 2016             |              |              |     |     |     |     |     |     |     |     |     |
|---|------------------|--------------|--------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
|   | Jan              | Feb          | Mar          | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| <b>Interviews</b>   | <b>2,146</b>     | <b>2,147</b> | <b>2,138</b> |     |     |     |     |     |     |     |     |     |
| <b>Q1</b> Would you say you and your family are better off financially or worse off than you were at this time last year?   |                  |              |              |     |     |     |     |     |     |     |     |     |
| Over the <u>past</u> year   | Better off       | 38           | 40           | 39  |     |     |     |     |     |     |     |     |
|   | Worse off        | 10           | 10           | 12  |     |     |     |     |     |     |     |     |
| <b>Question 1 difference</b>  | <b>28</b>        | <b>30</b>    | <b>27</b>    |     |     |     |     |     |     |     |     |     |
| <b>Q2</b> This time next year, do you and your family expect to be better off financially or worse off than you are now?  |                  |              |              |     |     |     |     |     |     |     |     |     |
|   | Better off       | 67           | 68           | 72  |     |     |     |     |     |     |     |     |
|   | Worse off        | 3            | 5            | 3   |     |     |     |     |     |     |     |     |
| <b>Question 2 difference</b>  | <b>64</b>        | <b>63</b>    | <b>69</b>    |     |     |     |     |     |     |     |     |     |
| <b>Q3</b> Thinking of economic conditions in Indonesia as a whole. In the next 12 months, do you expect we'll have good times financially, bad times or some good and some bad?                                       |                  |              |              |     |     |     |     |     |     |     |     |     |
|   | Good Times       | 81           | 79           | 80  |     |     |     |     |     |     |     |     |
|   | Bad Times        | 19           | 21           | 20  |     |     |     |     |     |     |     |     |
| <b>Question 3 difference</b>  | <b>62</b>        | <b>58</b>    | <b>60</b>    |     |     |     |     |     |     |     |     |     |
| <b>Q4</b> Looking ahead, what would you say it is more likely, that in Indonesia as a whole, we'll have continuous good times during the next five years or so – or we'll have bad times – or some good and some bad? |                  |              |              |     |     |     |     |     |     |     |     |     |
|   | Good times       | 91           | 89           | 90  |     |     |     |     |     |     |     |     |
|   | Bad times        | 9            | 10           | 10  |     |     |     |     |     |     |     |     |
| <b>Question 4 difference</b>  | <b>82</b>        | <b>79</b>    | <b>80</b>    |     |     |     |     |     |     |     |     |     |
| <b>Q5</b> Generally, do you think now is a good time – or a bad time – for people to buy major household items?   |                  |              |              |     |     |     |     |     |     |     |     |     |
|   | Good time to buy | 49           | 52           | 57  |     |     |     |     |     |     |     |     |
|   | Bad time to buy  | 48           | 46           | 40  |     |     |     |     |     |     |     |     |
| <b>Question 5 difference</b>  | <b>1</b>         | <b>6</b>     | <b>17</b>    |     |     |     |     |     |     |     |     |     |
| <b>Roy Morgan Indonesian Consumer Confidence Rating</b>   | <b>147.4</b>     | <b>147.1</b> | <b>150.6</b> |     |     |     |     |     |     |     |     |     |

\*The Roy Morgan Consumer Confidence Rating is 100.0 plus the simple unweighted average of the difference between the percentage of respondents who give a favourable and those who give unfavourable answers to five key questions.