

Friday, 1 June 2018

Restoran Sederhana & KFC battle to be top Indonesian restaurant

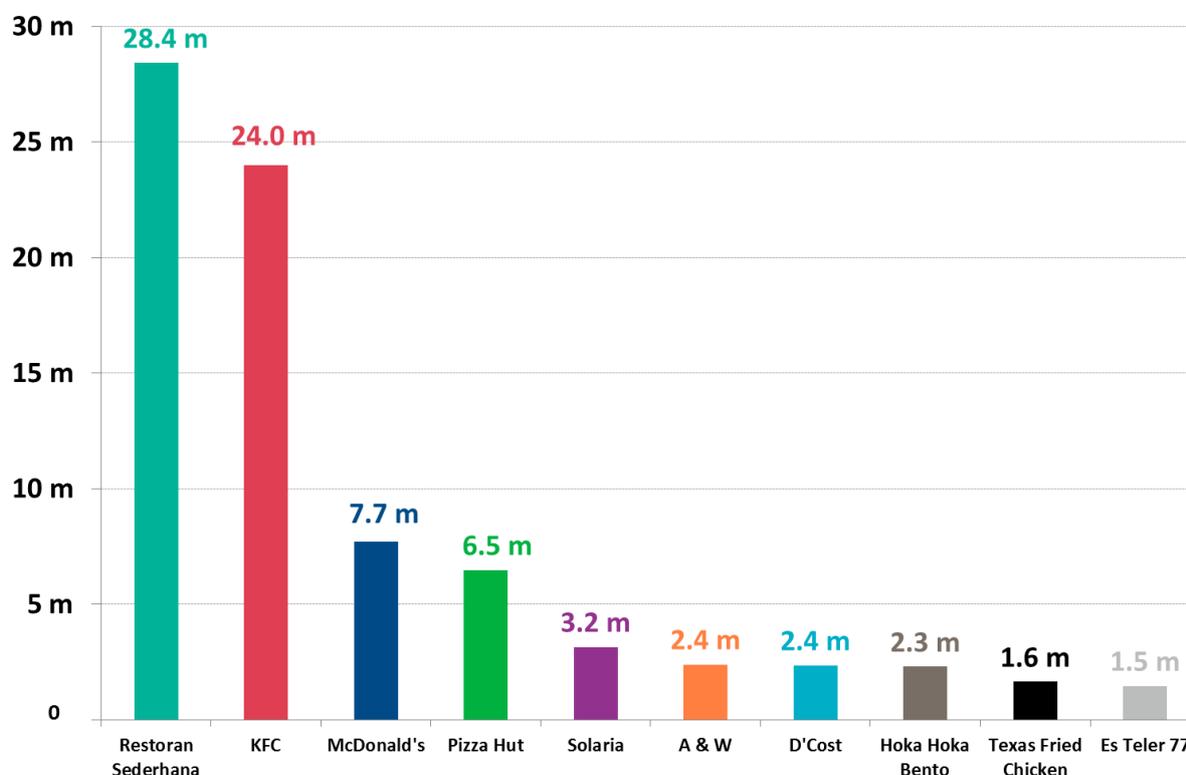
New research from Roy Morgan shows over 55 million Indonesians aged 14+ (34.3%) eat in family restaurants, buy take away or fast food whether from leading restaurants such as Restoran Sederhana, KFC, Solaria and McDonald's or eating at the local padang restaurant, buying drive-thru or ordering home delivery from the closest pizza shop in an average six months.

Patronage of restaurants and fast food stores in Indonesia is significantly lower than in southern neighbours [Australia \(84.5%\)](#) or [New Zealand \(84.8%\)](#). However, because of Indonesia's vast population there are more than three times as many Indonesians that eat at restaurants or fast food than the 17 million Australians.

Local favourite Restoran Sederhana with a menu based on the local padang cuisine is the most visited restaurant in Indonesia with over 28.4 million Indonesians visiting in an average six months. American chicken cuisine based restaurant KFC is a clear second nationwide with 24 million visitors.

American burger chain McDonald's is visited by 7.7 million Indonesians in an average six months while Pizza Hut is the top pizza restaurant visited by 6.5 million Indonesians. Several other restaurants including Solaria, A&W, D'Cost, Hoka Hoka Bento, Texas Fried Chicken and Es Teler 77 are visited by well over 1 million Indonesians in an average six months.

Top 10 restaurants and fast food outlets in Indonesia to eat at, have take away or home delivery in an average six months – 12 months to March 2018



Source: Roy Morgan Single Source Indonesia: April 2017 – March 2018, n = 30,311 Indonesians aged 14+.

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Greater Jakarta – Jabodetabek – has a voracious appetite for take away and fast food

Patronage of fast food restaurants is significantly higher in Indonesia's biggest city of Jakarta and the surrounding areas of Greater Jakarta known as Jabodetabek.

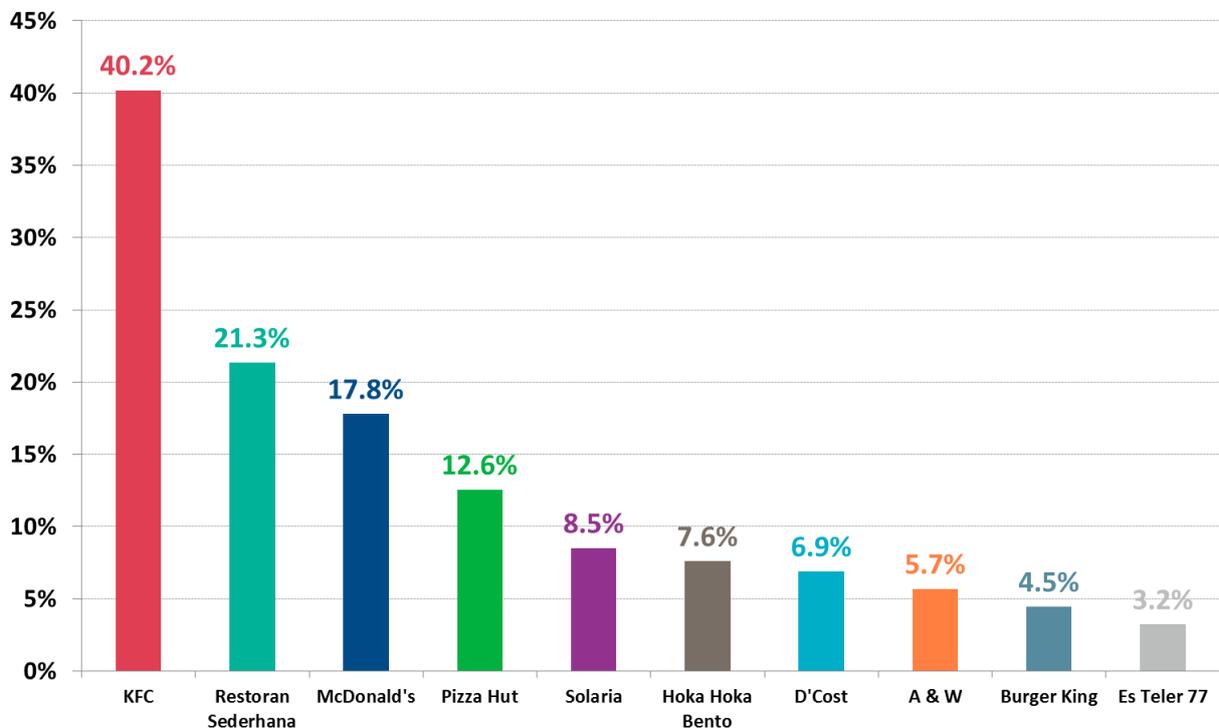
There are over 21 million Indonesians aged 14+ living in Jabodetabek – a similar population to all of Australia. Over 12 million people living in Jabodetabek, or 59% of the area's population, visit fast food restaurants in an average six months.

In a reverse of the national situation KFC is the top fast food restaurant in Jabodetabek.

Nearly 8.5 million Jabodetabek residents (40.2%) visit KFC in an average six months compared to 4.5 million (21.3%) that visit Restoran Sederhana.

McDonald's is a clear third on 17.8% ahead of Pizza Hut on 12.6% and Solaria on 8.5%. Well over a million residents of Jabodetabek visit all of the above restaurants in an average six months.

Top 10 restaurants and fast food outlets in Jabodetabek to eat at, have take away or home delivery in an average six months – 12 months to March 2018



Source: Roy Morgan Single Source Indonesia: April 2017 – March 2018, n = 30,311 Indonesians aged 14+.

Base: 5,283 Indonesians aged 14+ in the Greater Jakarta area – 'Jabodetabek'. Jabodetabek is a portmanteau of Jakarta and its nearby satellite urban centres of Bogor & Depok to the south, Tangerang to the west and Bekasi to the east.

Michele Levine, CEO, Roy Morgan, says with over 55 million Indonesians eating out at family restaurants and buying take away food the country presents a huge opportunity to savvy restaurateurs and restaurant chains looking to grow their business:

"It's long been known Indonesia presents a huge opportunity to businesses looking to expand into new markets. But for fast food outlets and restaurateurs in particular quantifying the actual size of that market has never been easy.

"Detailed Roy Morgan surveys across the Indonesian archipelago reveal a stunning 55 million Indonesians eat at restaurants and buy take away food and with the Indonesian economy growing at around 5% per year that number is set to expand significantly in the years ahead.

“At present two restaurant chains dominate the Indonesian market. Local padang cuisine restaurant Restoran Sederhana (which translates to Simple Restaurant in English) reaches over 28 million Indonesians in an average six months – greater than the total population of Australia and New Zealand combined. American chicken cuisine based fast food restaurant KFC is close behind visited by 24 million Indonesians in the same time period.

“Behind these two leaders are a suite of international fast food chains including McDonald’s Pizza Hut and Burger King as well as a variety of local restaurant chains including Solaria, Hoka Hoka Bento and D’Cost Seafood.

“Perhaps unsurprisingly, Indonesian’s love of take away food is strongest in the Greater Jakarta region often referred to as ‘Jabodetabek’. There are over 21 million Indonesians aged 14+ in Jabodetabek – an adult population greater than in Australia.

“Over 12 million people living in Jabodetabek eat at restaurants and buy take away food and KFC is their preferred restaurant of choice. Over 40% of Jabodetabek residents eat at KFC in an average six months nearly twice the rate of local cuisine restaurateur Restoran Sederhana (21.3%). Both McDonald’s (17.8%) and Pizza Hut (12.6%) have much higher market penetration in Jabodetabek than in Indonesia as a whole.

“However, although the Greater Jakarta area of Jabodetabek is recognised as Indonesia’s leading city, it’s worth understanding that the vast majority of Indonesians eating fast food (43 million) live in other cities and towns throughout the country. That 43 million represents over three-quarters of the Indonesian fast food market and is often overlooked to some extent by international restaurant chains planning on entering the Indonesian market.

“The beauty of Roy Morgan’s rich Indonesian data is that it is compiled based on over 2,000 interviews each and every month across the length and breadth of Indonesia. Combining the detailed Roy Morgan Indonesia Single Source interviews with the exciting new [Roy Morgan Helix Personas Indonesia](#) product allows an unrivalled peek at the Indonesian consumer.

“Roy Morgan Helix Personas Indonesia is a powerful psychographic segmentation tool that analyses the consumers in this fast growing economy at a level of detail that will give any businesses eyeing off the Indonesian market a unique advantage over their competitors.”

For comments and information about Roy Morgan’s latest Indonesian quick service restaurant and additional food and meal delivery service data, please contact:

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Related research

Browse our Online Store for access to [Roy Morgan Indonesian Single Source](#) data and the innovative psychographic segmentation tools available with [Roy Morgan Helix Personas Indonesia](#).

Compiled with data from Roy Morgan’s Single Source survey (the largest of its kind in the world, with 25,000 respondents p.a), these ready-made profiles provide a broad understanding of the target



About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices Indonesia and in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 75 years' experience in collecting objective, independent information on consumers.

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. Margin of error 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. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2