

INDONESIA

DIGITAL LANDSCAPE

2013

By





ONLINE POPULATION DEMOGRAPHICS

OVERVIEW

250 MILLION
PEOPLE

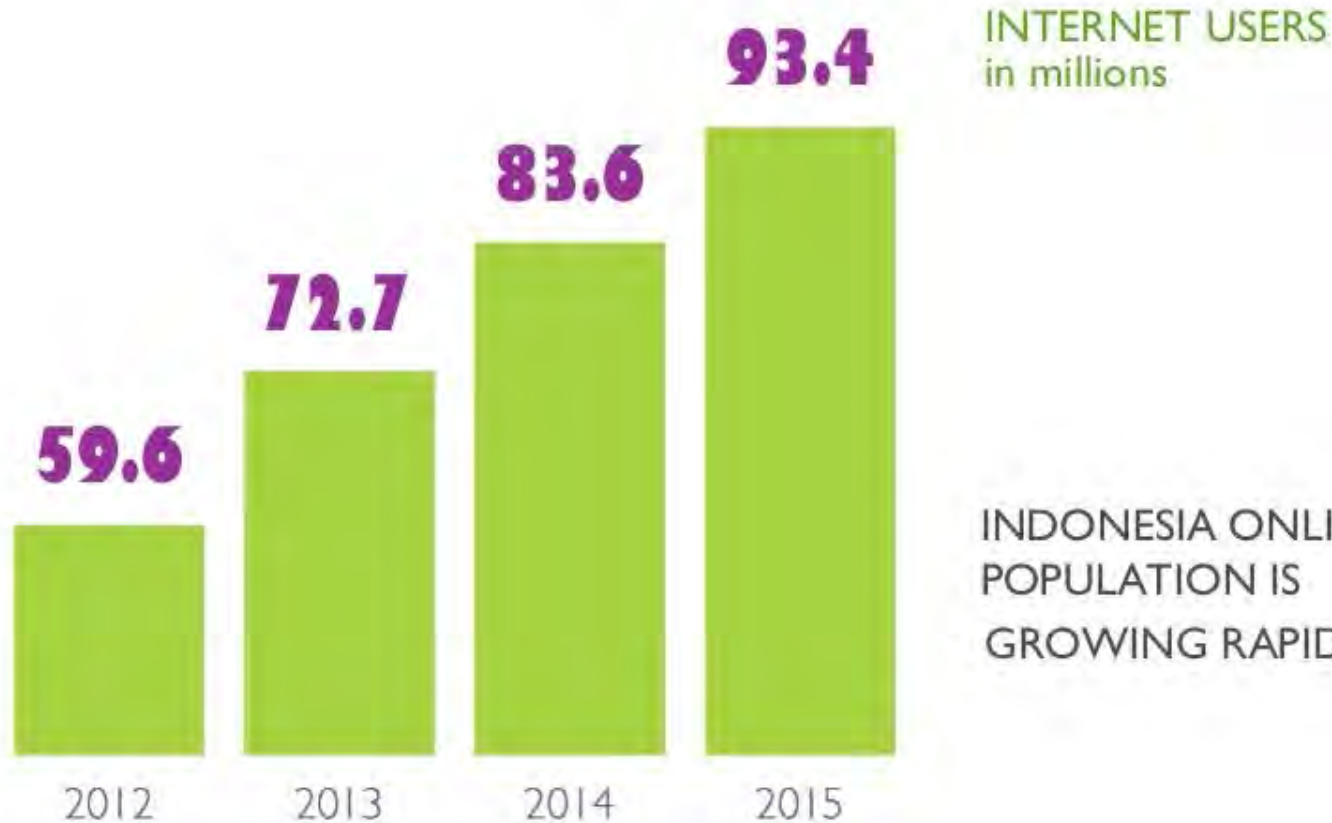
4th LARGEST POPULATION
IN THE WORLD

73 MILLION ONLINE POPULATION
BY THE END OF 2013



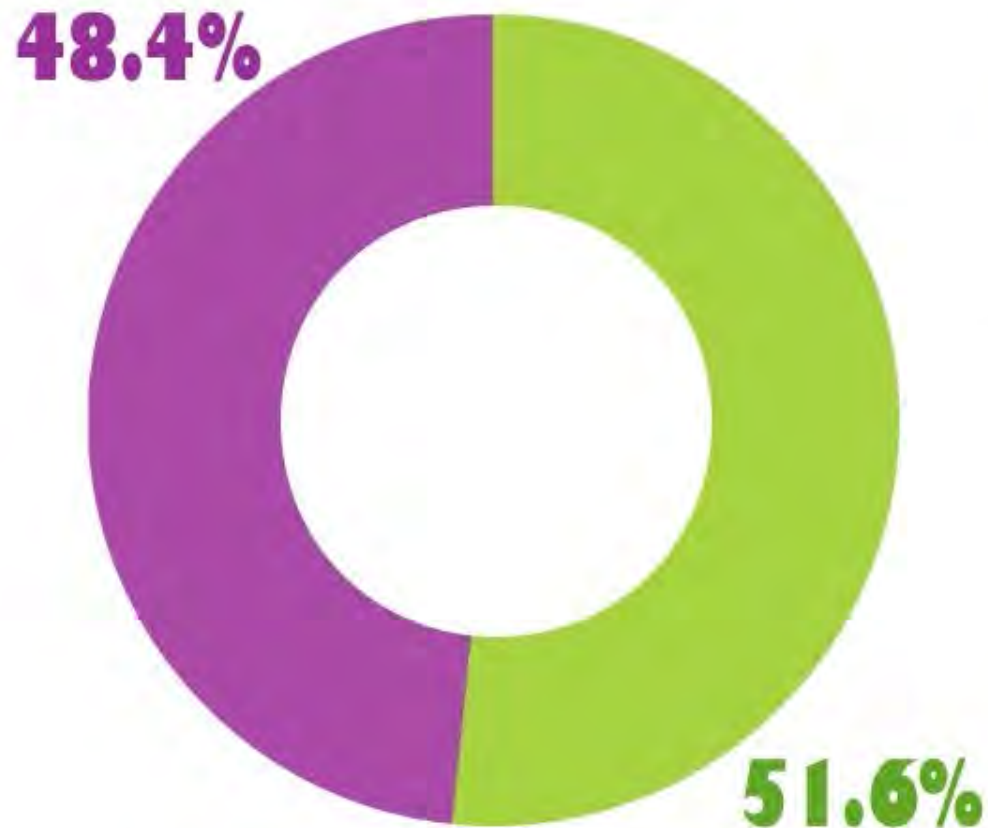
Source: eMarketer, Indonesia Online, March 2013

OVERVIEW



Source: eMarketer, Indonesia Online, March 2013

DEMOGRAPHICS BY GENDER



male

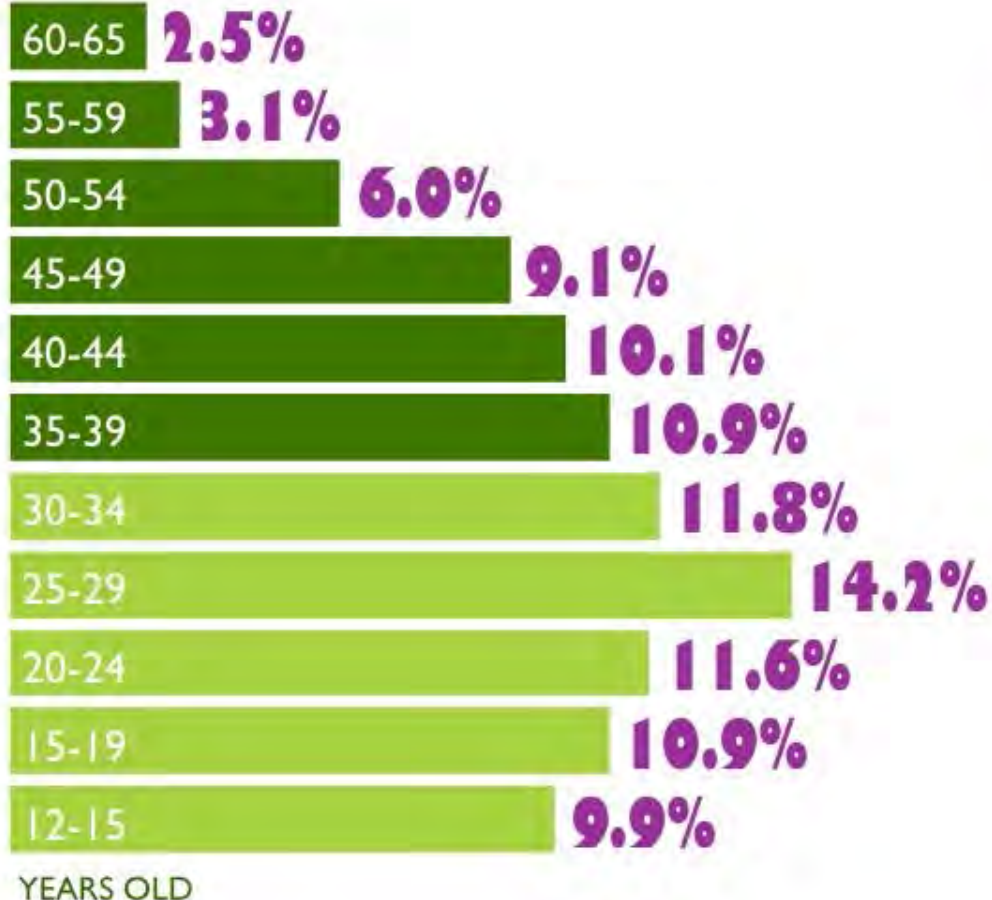


female

FEMALE INTERNET USERS
STARTED TO CATCH UP
WITH THE PROPORTION OF
MALE INTERNET USERS

Source: APJII, Profil Internet Indonesia, December 2012

DEMOGRAPHICS BY AGE



Source: APJII, Profil Internet Indonesia, December 2012

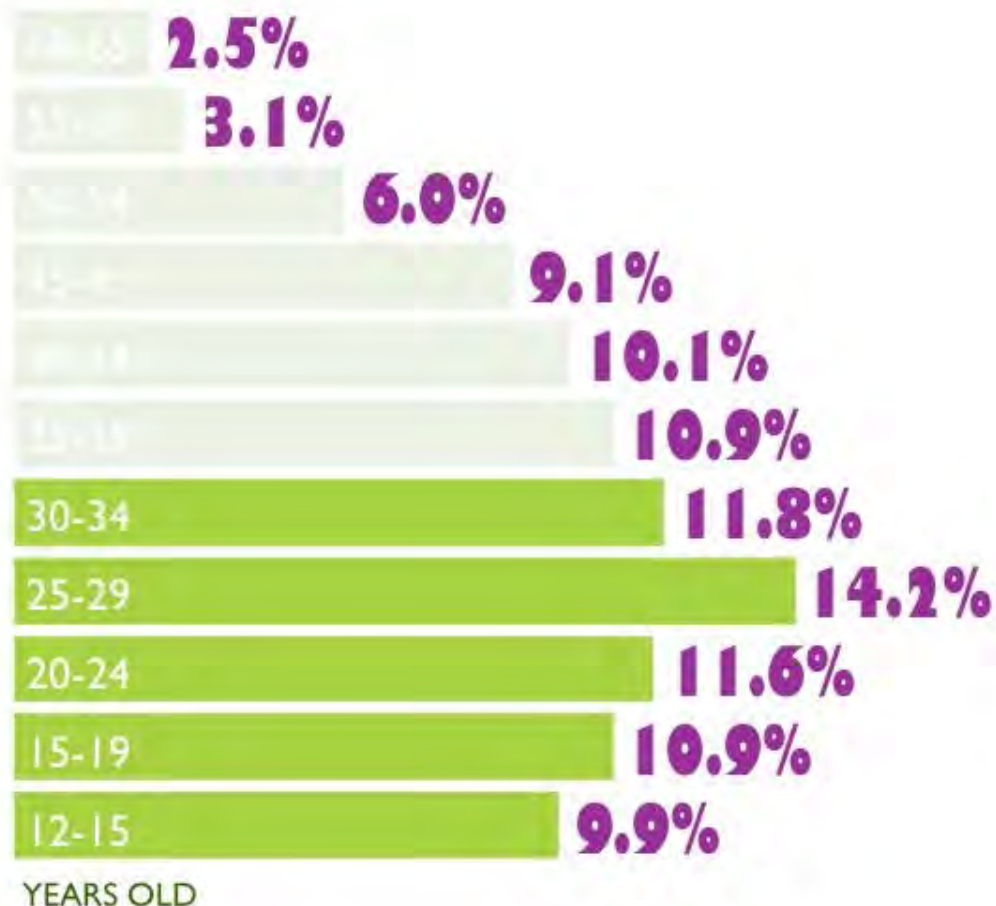
DIGITAL IMMIGRANT

This older generation knew internet when they were an adult. They often feel the need to always learn to adapt with the new technologies.

DIGITAL NATIVE

This younger generation born and living in the internet era. They tend to make trends in cyberspace.

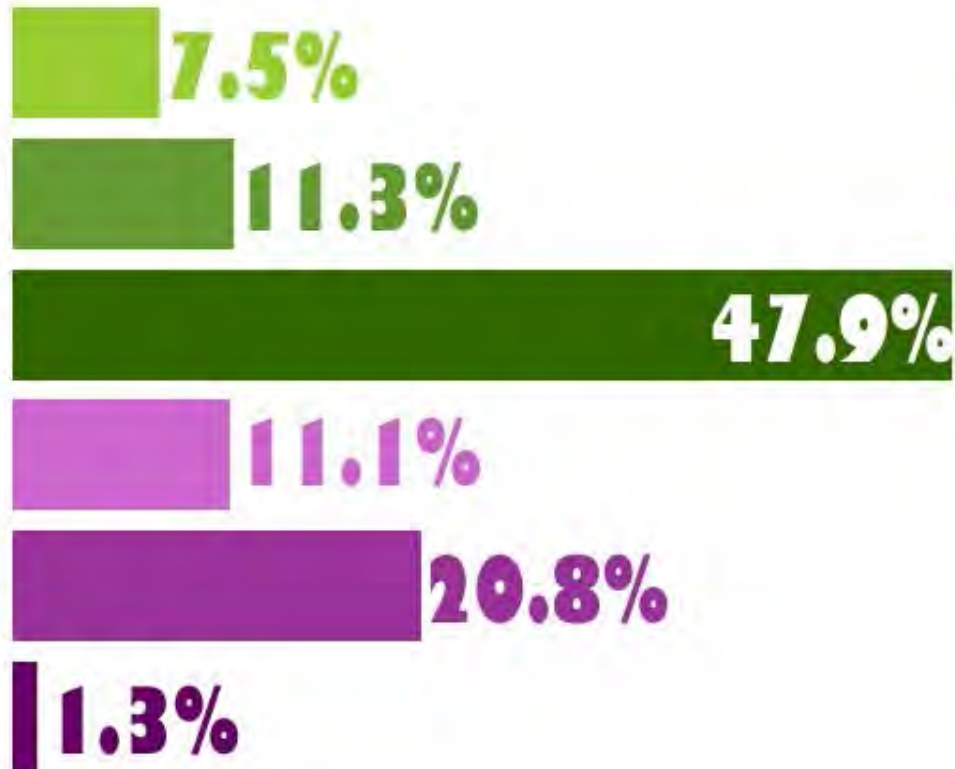
DEMOGRAPHICS BY AGE



INTERNET USERS IS
DOMINATED BY YOUNGER
GENERATION
12-34 YEARS OLD
(58.4%)

Source: APJII, Profil Internet Indonesia, Desember 2012

DEMOGRAPHICS BY EDUCATION

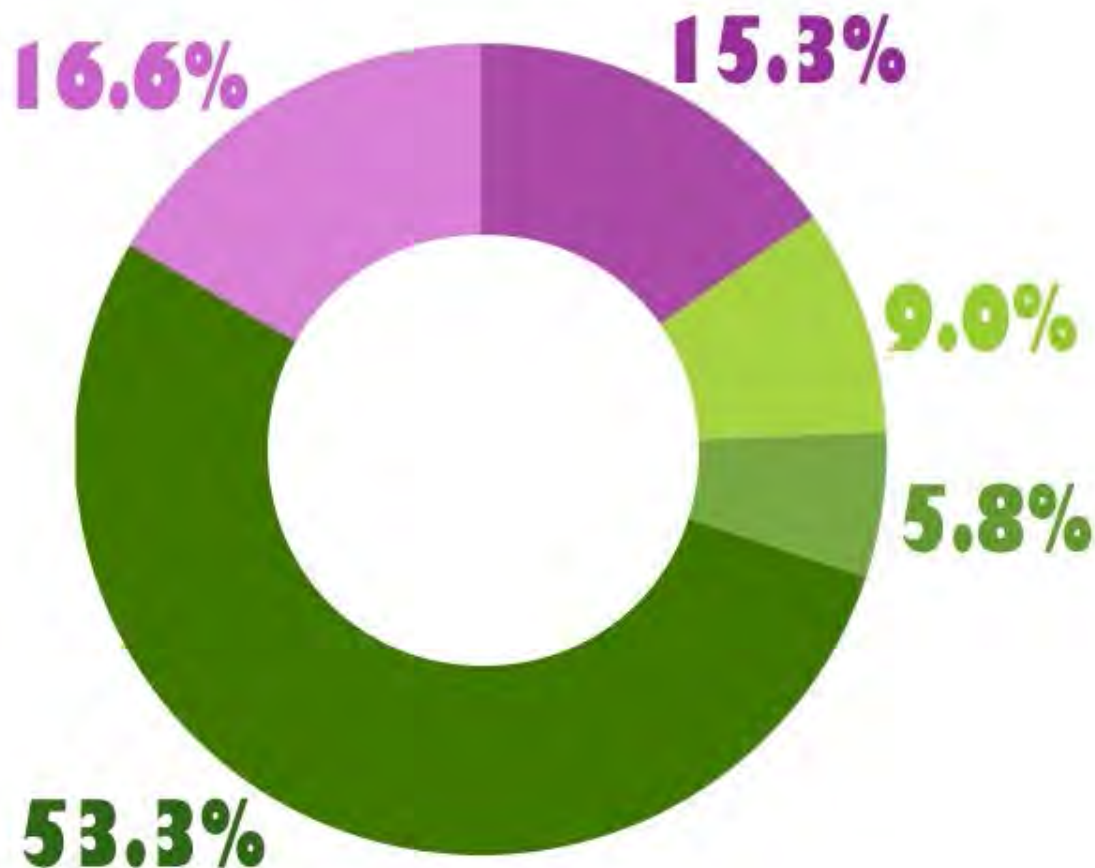


- ELEMENTARY SCHOOL
- MIDDLE SCHOOL
- HIGH SCHOOL
- DIPLOMA
- GRADUATE
- POST-GRADUATE

INTERNET USERS IS
DOMINATED BY PEOPLE WITH
HIGHER EDUCATION

Source: APJII, Profil Internet Indonesia, December 2012

DEMOGRAPHICS BY ACTIVITY

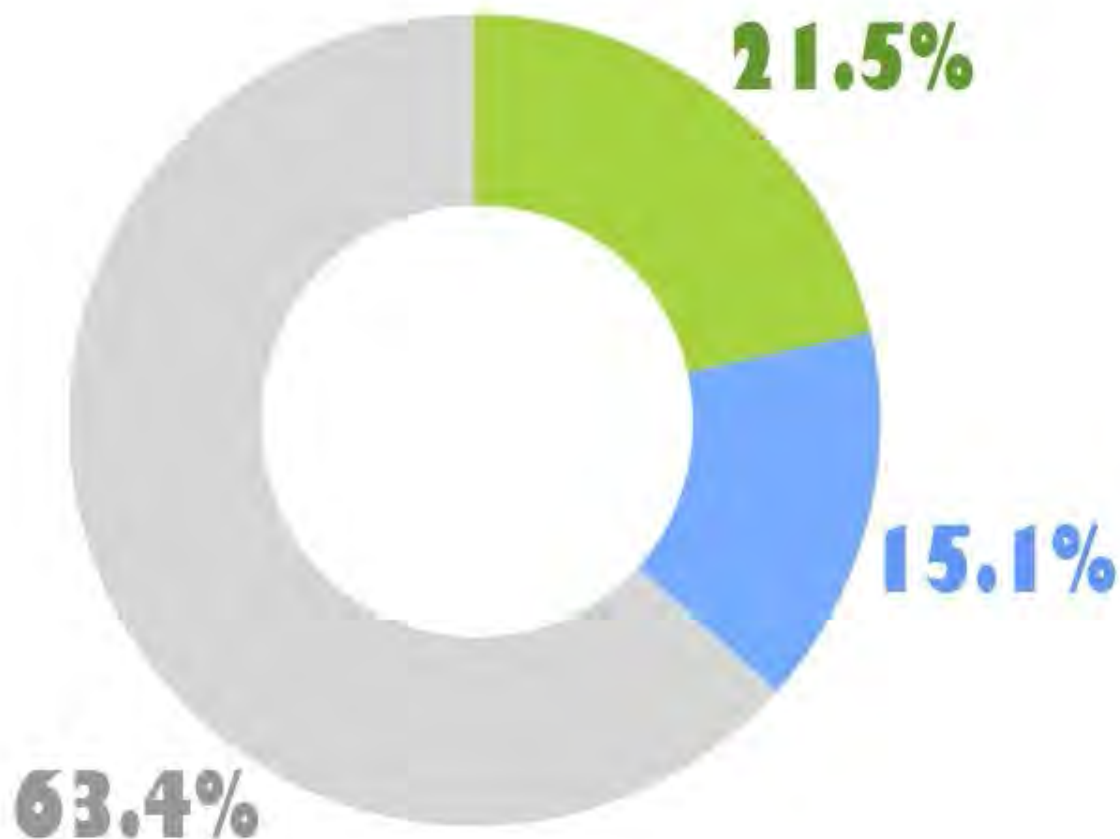


- STUDENTS
- HOUSEWIVES
- COLLEGE STUDENTS
- UNEMPLOYMENTS
- WORKERS

PROPORTION OF HOUSEWIVES AS A GROUP OF INTERNET USERS CONTINUES TO INCREASE BECAUSE OF THE NEED TO SOCIALIZE, SEEK INFORMATION OR CONDUCT A BUSINESS

Source: APJII, Profil Internet Indonesia, December 2012

DEMOGRAPHICS BY PROFESSION



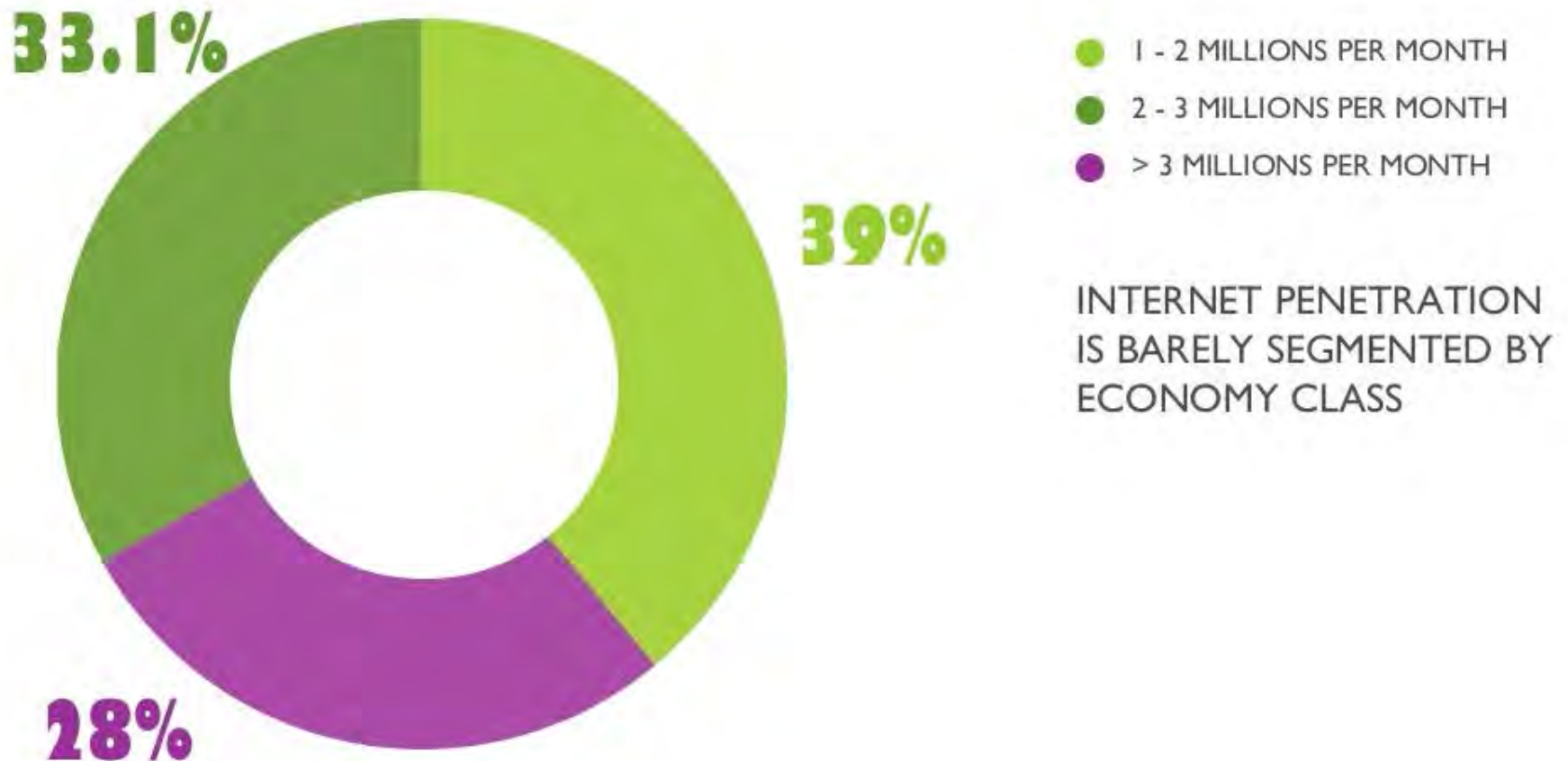
- ENTREPRENEUR
- BLUE COLLAR
- WHITE COLLAR

BLUE COLLAR IS USING INTERNET TO SOCIALIZE RATHER THAN DIRECTLY RELATED TO WORK

WHITE COLLAR INTENSELY ACCESSING THE INTERNET ANYTIME & ANYWHERE TO OBTAIN INFORMATION DIRECTLY TO WORK OR INDIRECTLY TO SELF-DEVELOPMENT

Source: APJII, Profil Internet Indonesia, December 2012

DEMOGRAPHICS BY MONTHLY SPENDING

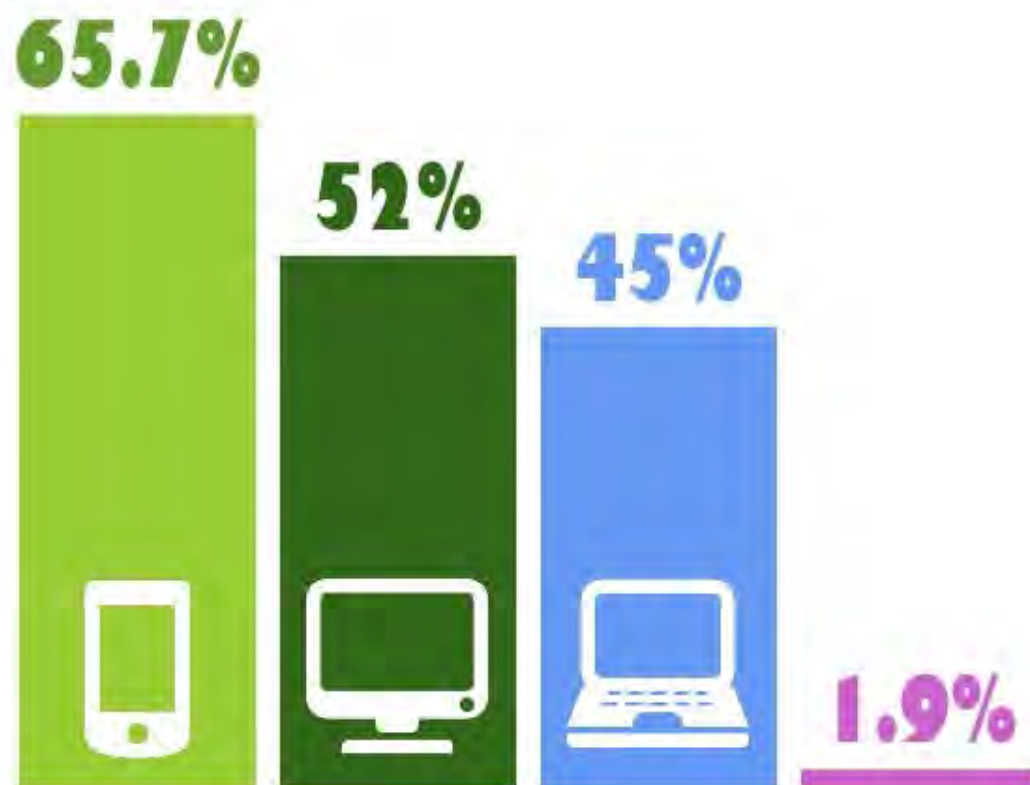


Source: APJII, Profil Internet Indonesia, December 2012

02

INTERNET USERS BEHAVIOR

DEVICE USED

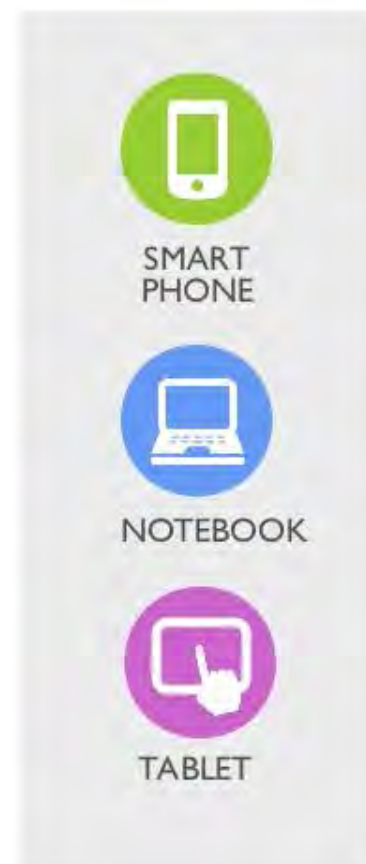
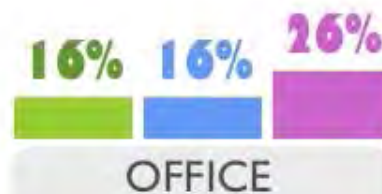


- SMARTPHONE
- DESKTOP PC
- NOTEBOOK
- TABLET

MOBILE INTERNET IS MAKING GAINS, AIDED BY THE PROLIFERATION OF AFFORDABLE SMARTPHONES MANUFACTURED IN CHINA, ALONG WITH MORE AFFORDABLE DATA PACKAGES

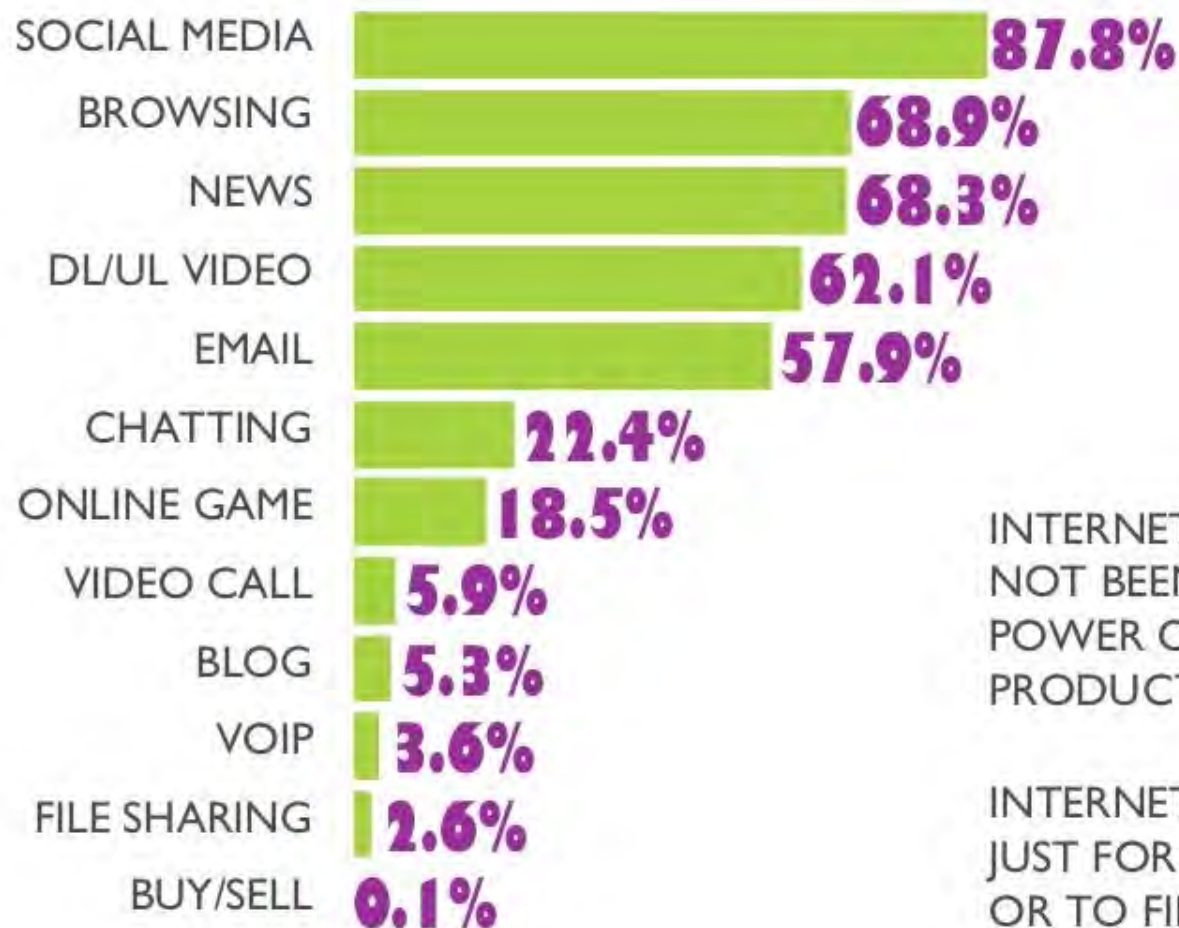
Source: APJII, Profil Internet Indonesia, December 2012

LOCATION BY DEVICE TYPE



Source: APJII, Profil Internet Indonesia, December 2012

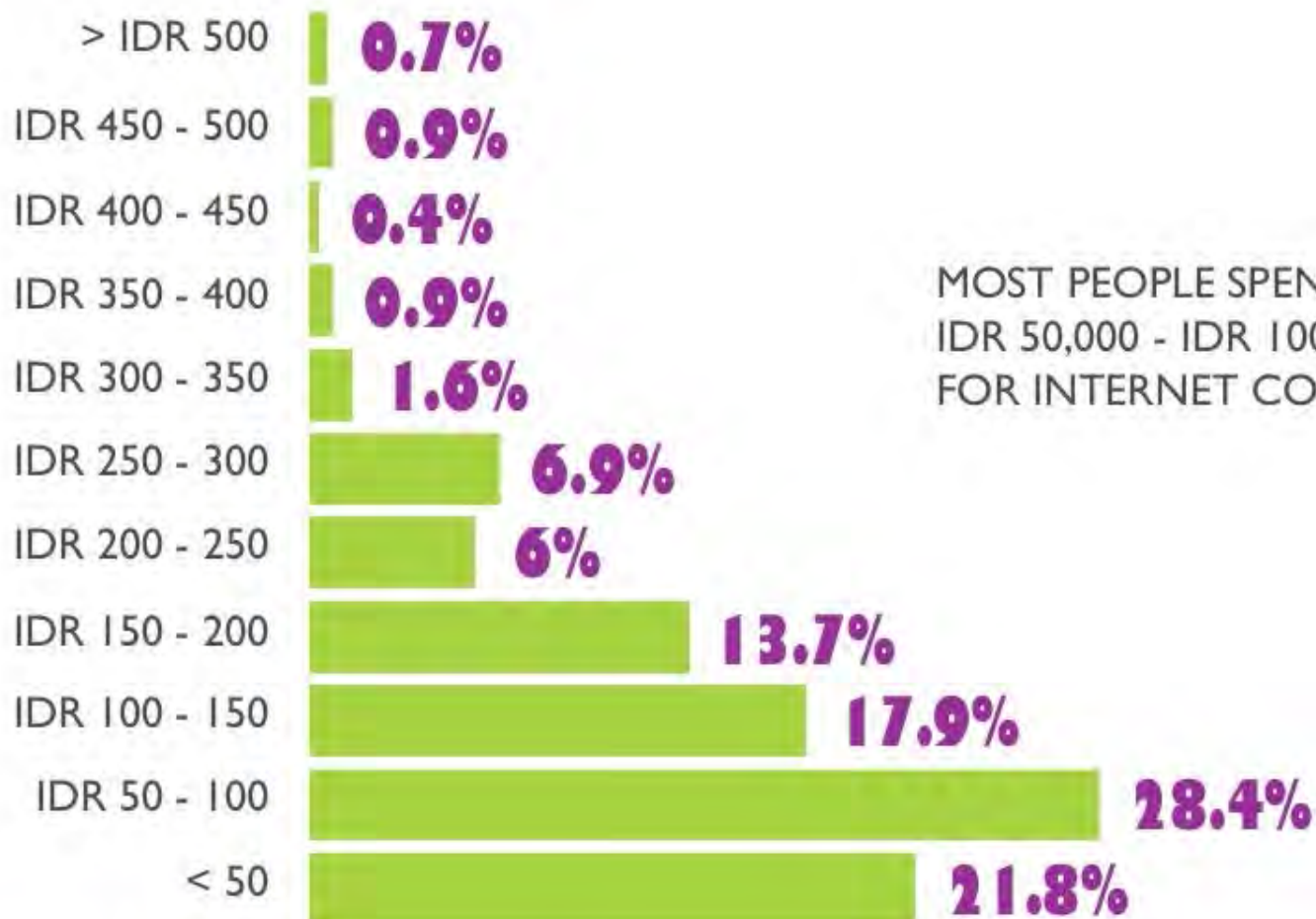
REASONS TO GO ONLINE



INTERNET USERS IN INDONESIA HAS NOT BEEN SERIOUSLY HARNESS THE POWER OF TECHNOLOGY FOR PRODUCTIVE ACTIVITIES

INTERNET IS STILL LARGELY USED JUST FOR SOCIAL MEDIA, BROWSING OR TO FIND THE LATEST NEWS UPDATES

INTERNET SPENDING PER MONTH



MOST PEOPLE SPEND
IDR 50,000 - IDR 100,000 PER MONTH
FOR INTERNET CONNECTION

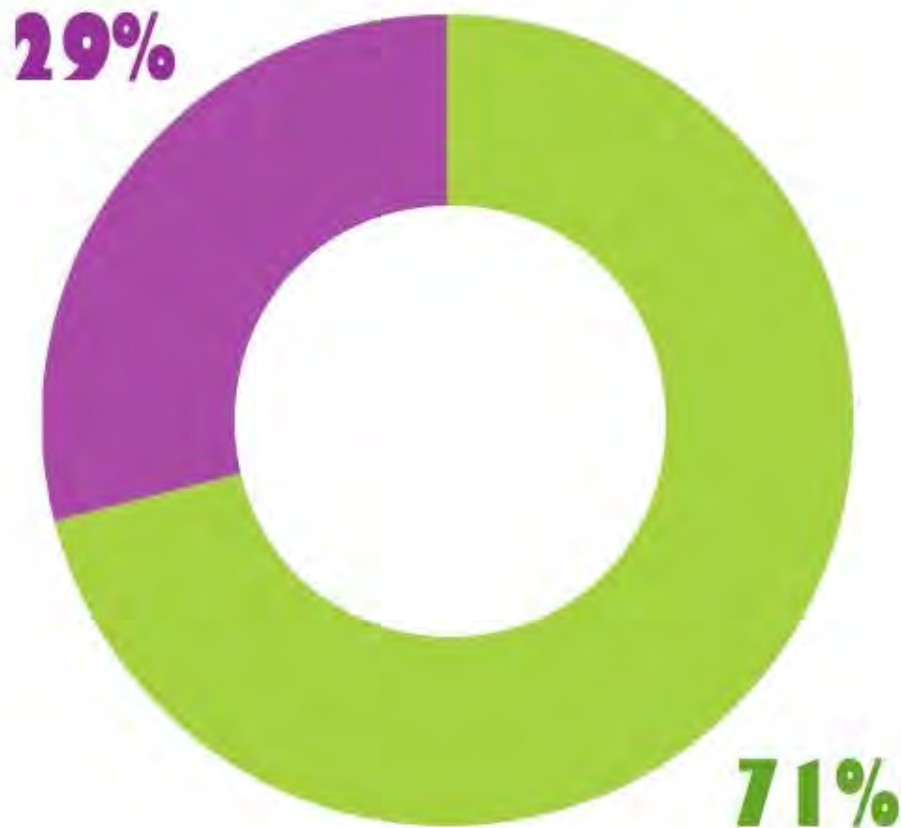
IN THOUSANDS

Source: APJII, Profil Internet Indonesia, December 2012

03

MOBILE INTERNET

DEMOGRAPHICS BY GENDER



male

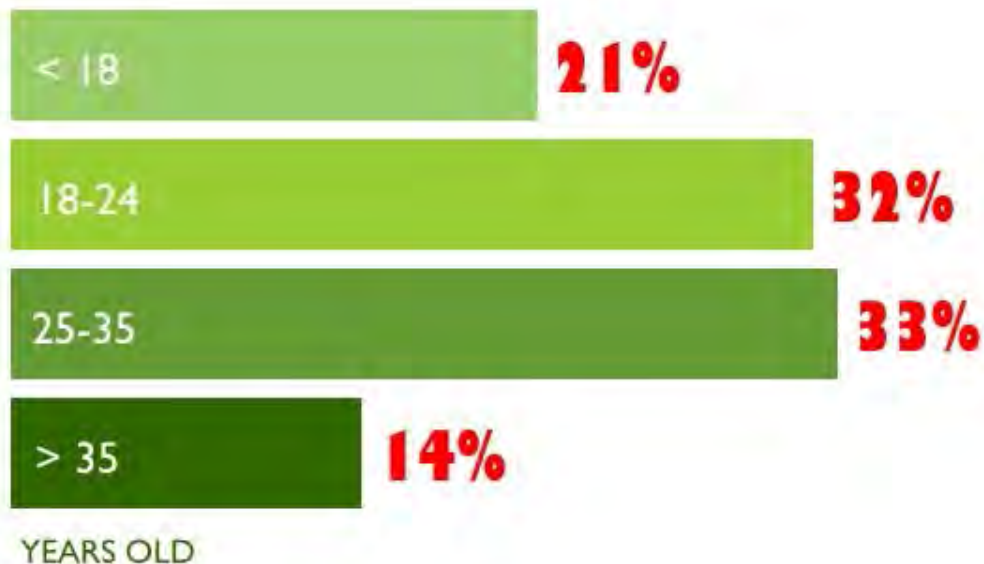


female

INDONESIA HAS ONE OF THE HIGHEST MALE TO FEMALE RATIO AMONG MOBILE INTERNET USERS IN SOUTH EAST ASIA

Source: APJII, Profil Internet Indonesia, December 2012

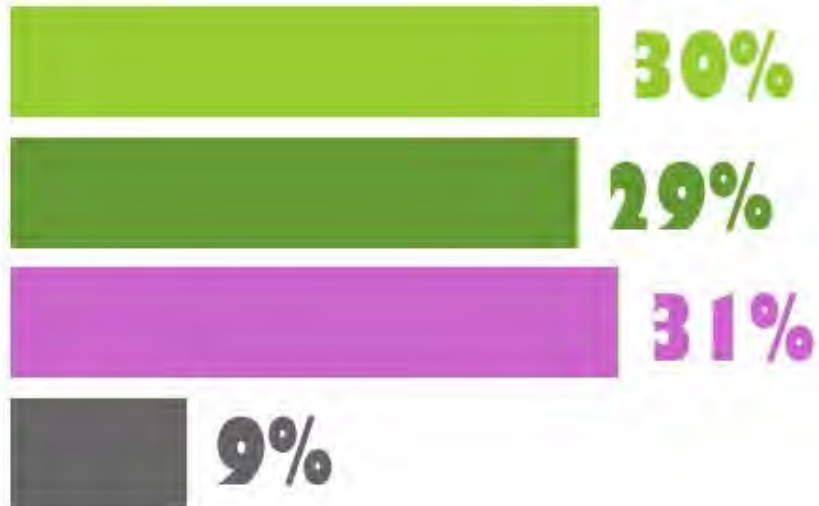
DEMOGRAPHICS BY AGE



INDONESIA HAS THE YOUNGEST MOBILE INTERNET USER BASE IN SOUTH EAST ASIA

Source: MMA & VSERV.mobi, The Mobile Internet Consumer Indonesia, 2013

DEMOGRAPHICS BY EDUCATION

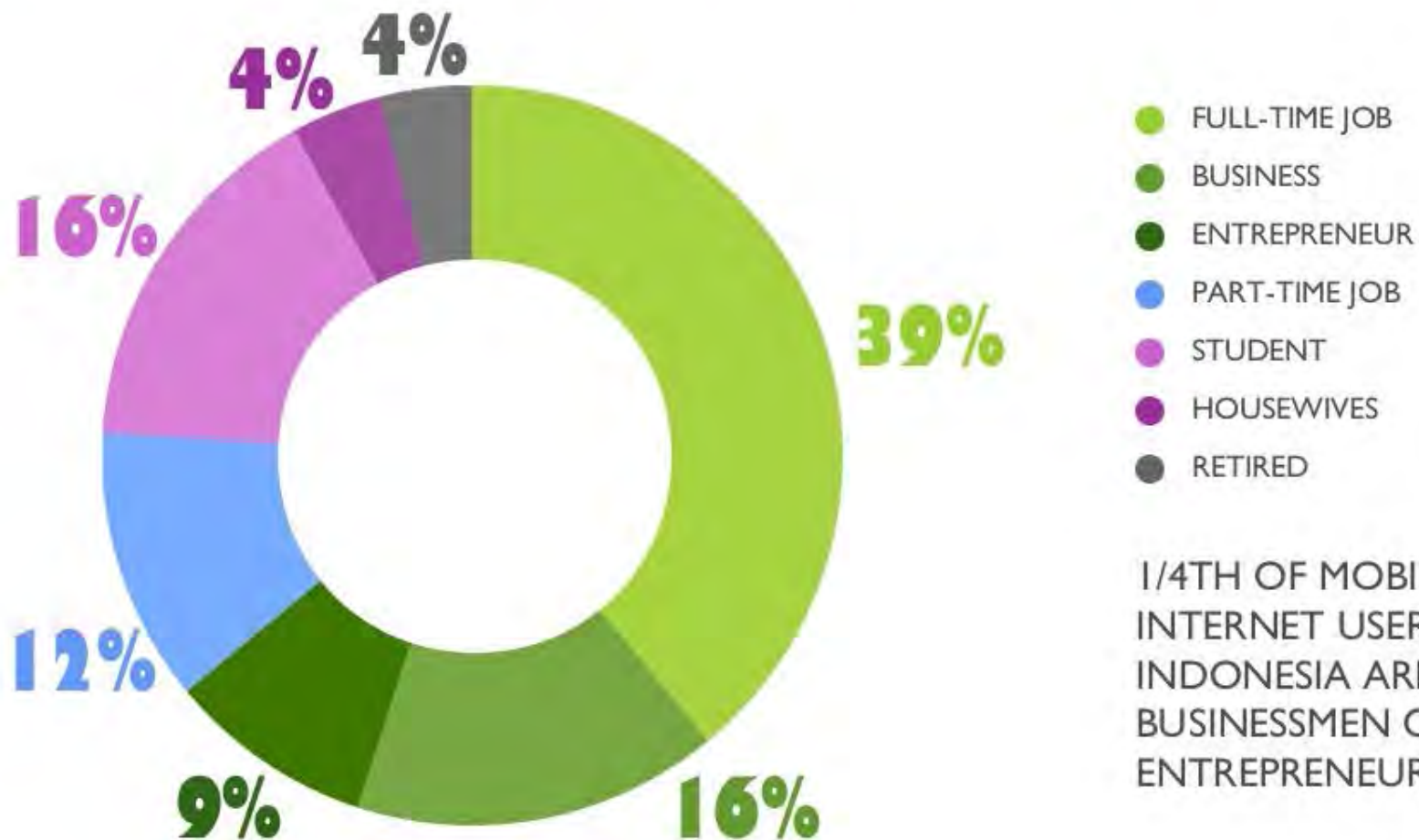


- GRADUATE / POST-GRADUATE
- DIPLOMA / UNDER-GRADUATE
- SCHOOLING UP TO 12 YEARS
- UNEDUCATED

30% OF MOBILE INTERNET USERS IN INDONESIA ARE GRADUATES / POST-GRADUATES

Source: MMA & VSERV.mobi, The Mobile Internet Consumer Indonesia, 2013

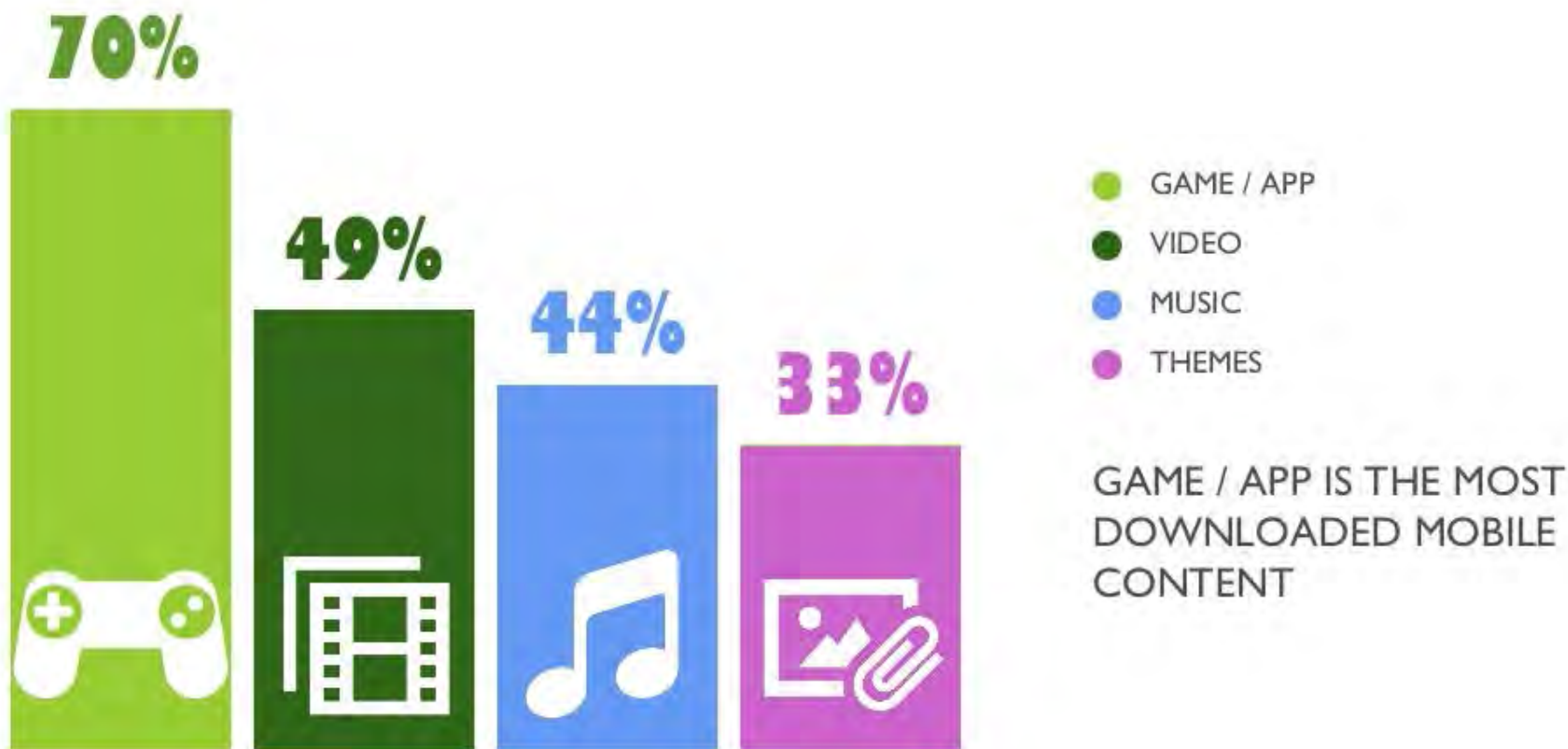
DEMOGRAPHICS BY ACTIVITY



1/4TH OF MOBILE INTERNET USERS IN INDONESIA ARE BUSINESSMEN OR ENTREPRENEUR

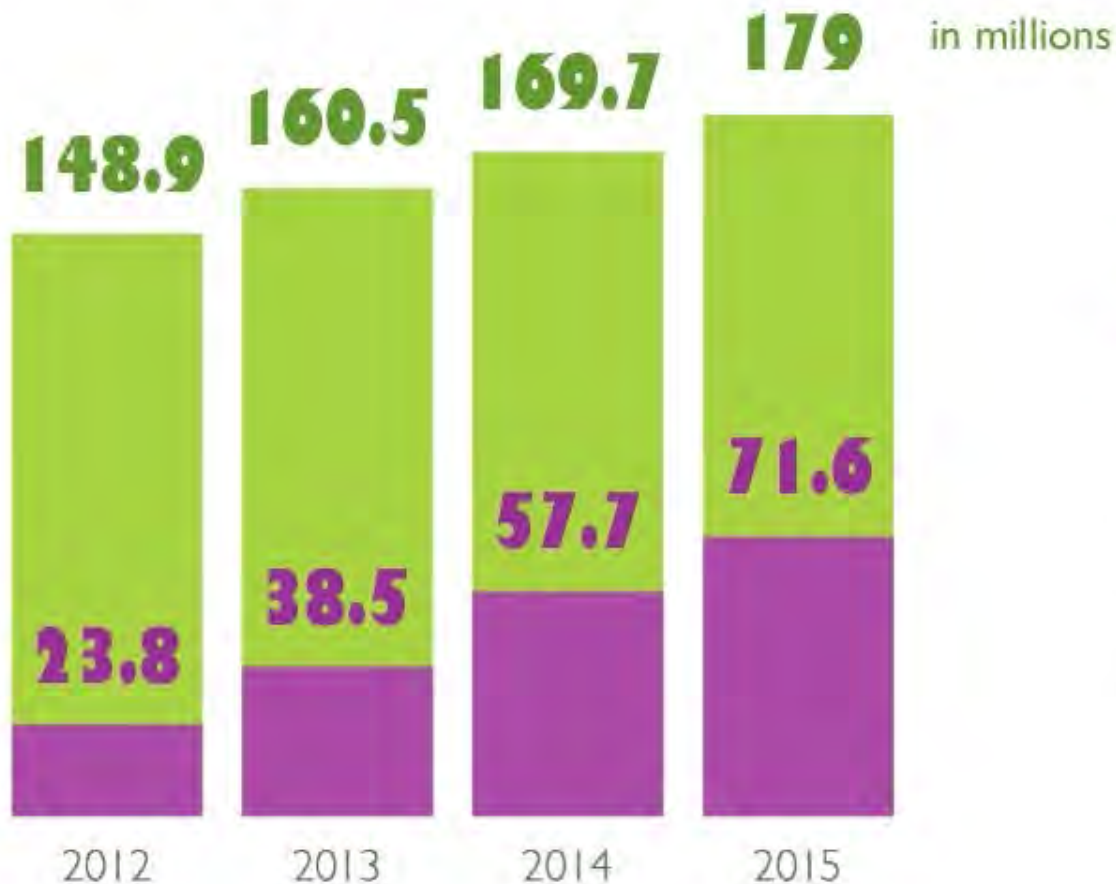
Source: MMA & VSERV.mobi, The Mobile Internet Consumer Indonesia, 2013

DOWNLOADED CONTENTS



Source: MMA & VSERV.mobi, The Mobile Internet Consumer Indonesia, 2013

MOBILE PHONE USERS

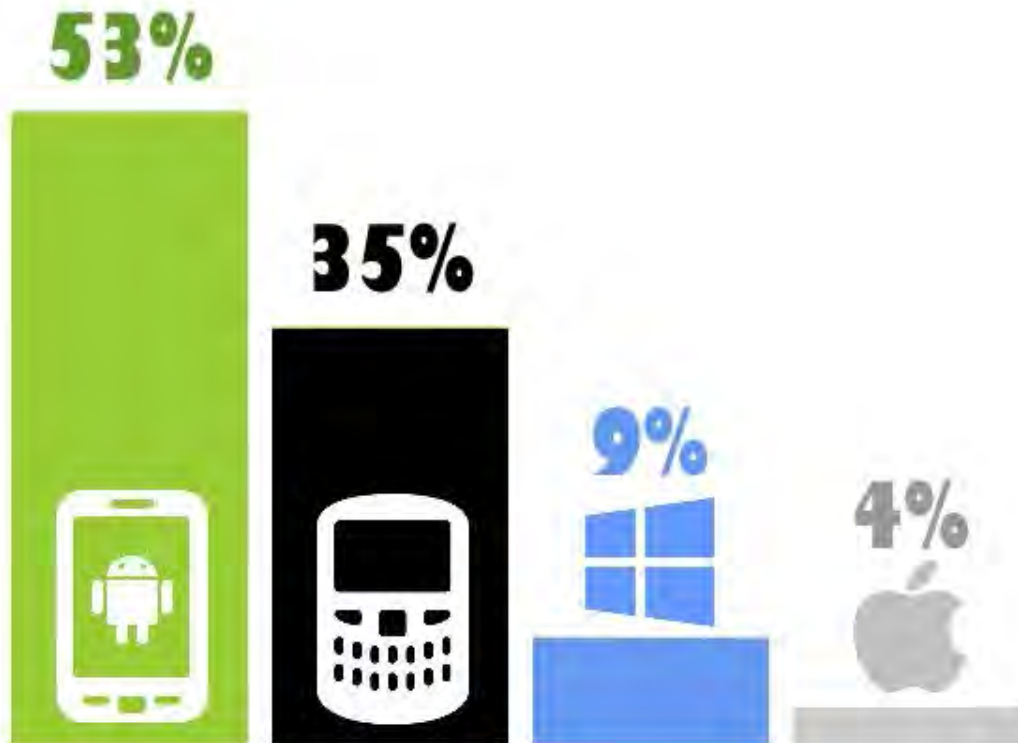


- MOBILE PHONE USERS
- SMARTPHONE USERS

IN 2015, SMARTPHONE USERS IN INDONESIA WILL REACH 71.6 MILLION PEOPLE

Source: eMarketer, April 2012

OPERATING SYSTEMS

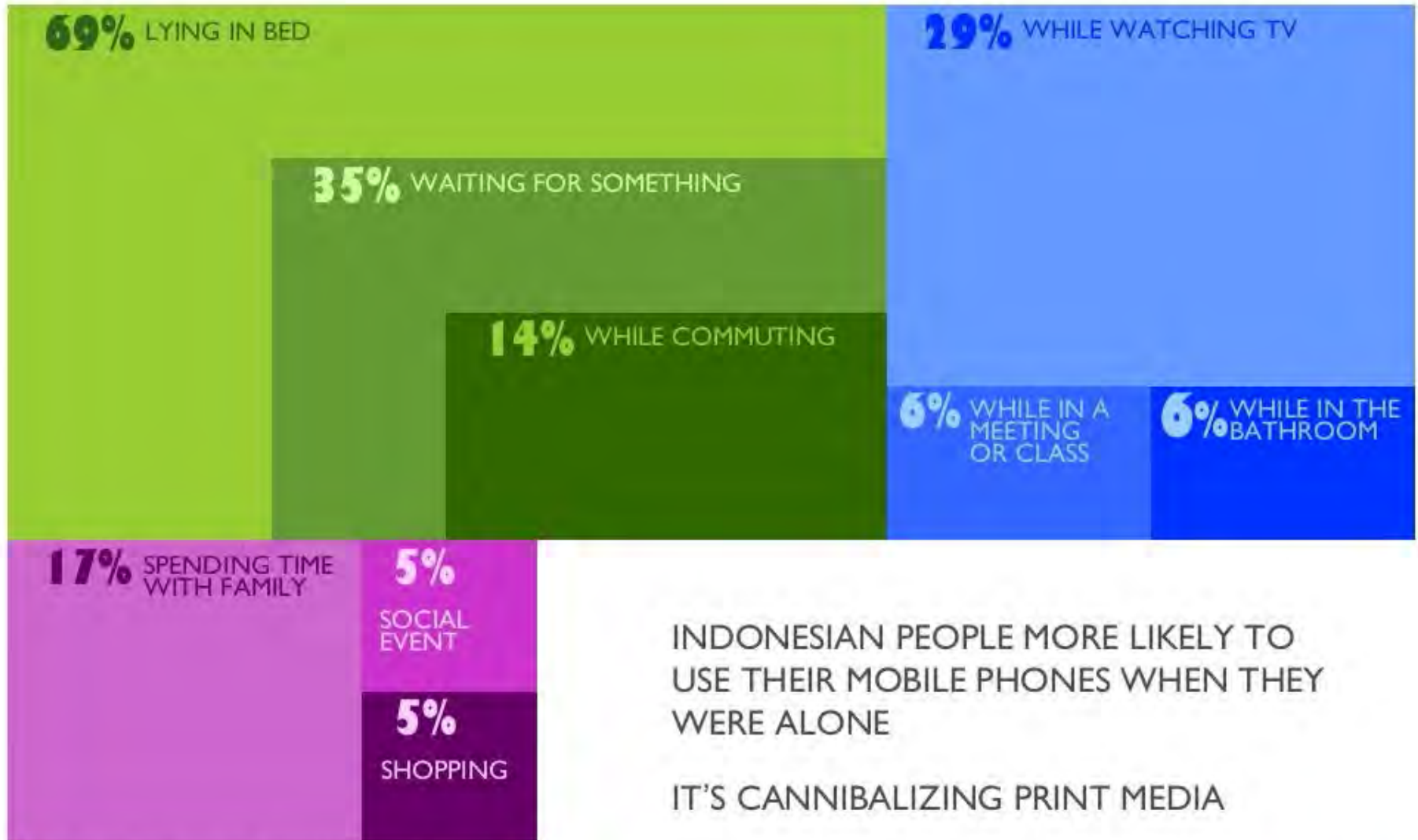


- ANDROID
- BLACKBERRY
- WINDOWS
- IOS

ALTHOUGH ANDROID HAS QUICKLY BECOME MAJORITY, UNTIL NOW, BLACKBERRY REMAINS A SIGNIFICANT PLAYER.

Source: IDC Indonesia via Jakarta Post, January 2013

LOCATION

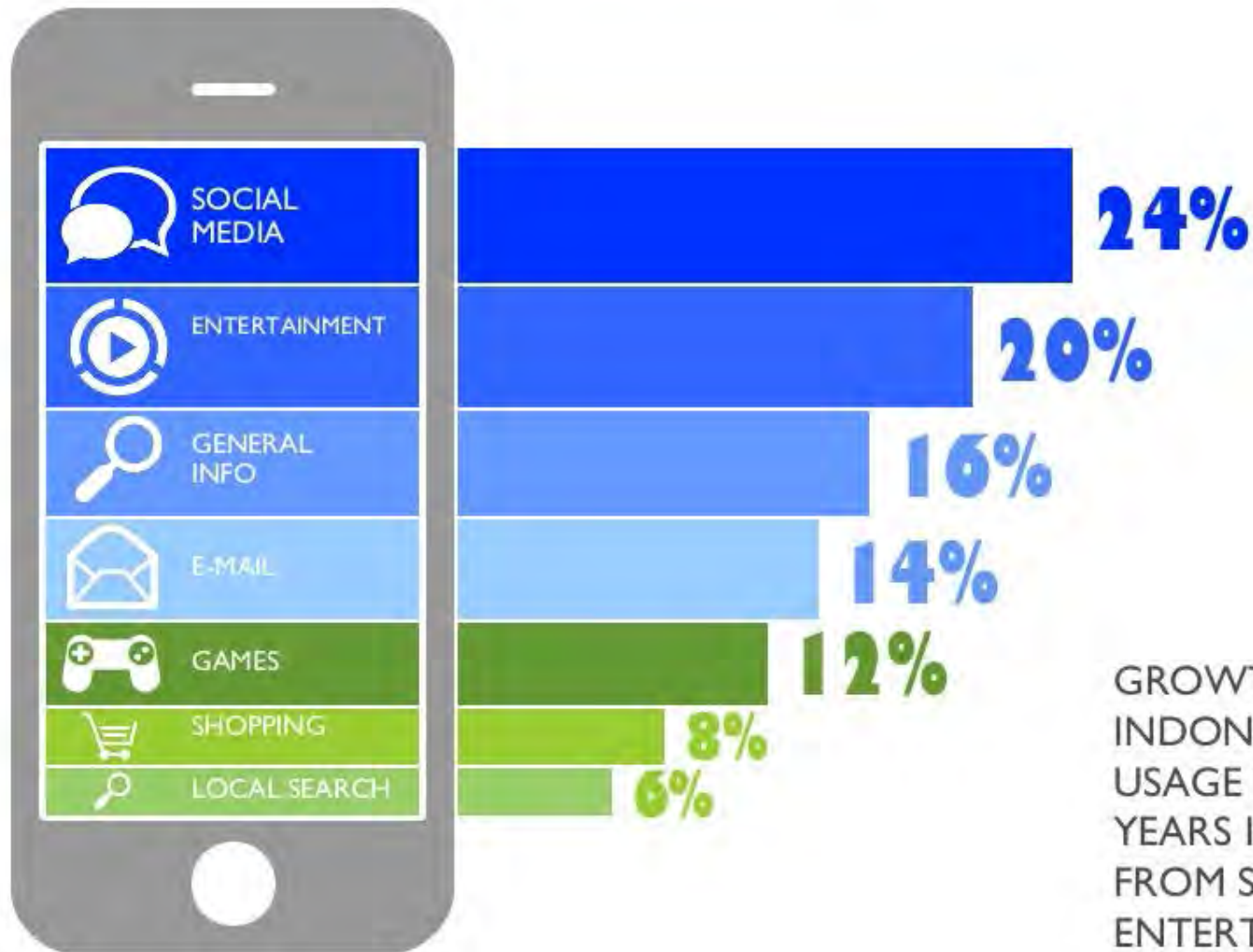


INDONESIAN PEOPLE MORE LIKELY TO USE THEIR MOBILE PHONES WHEN THEY WERE ALONE

IT'S CANNIBALIZING PRINT MEDIA

Source: InMobi, Mobile Media Consumption-Indonesia

MOBILE PHONE USAGE



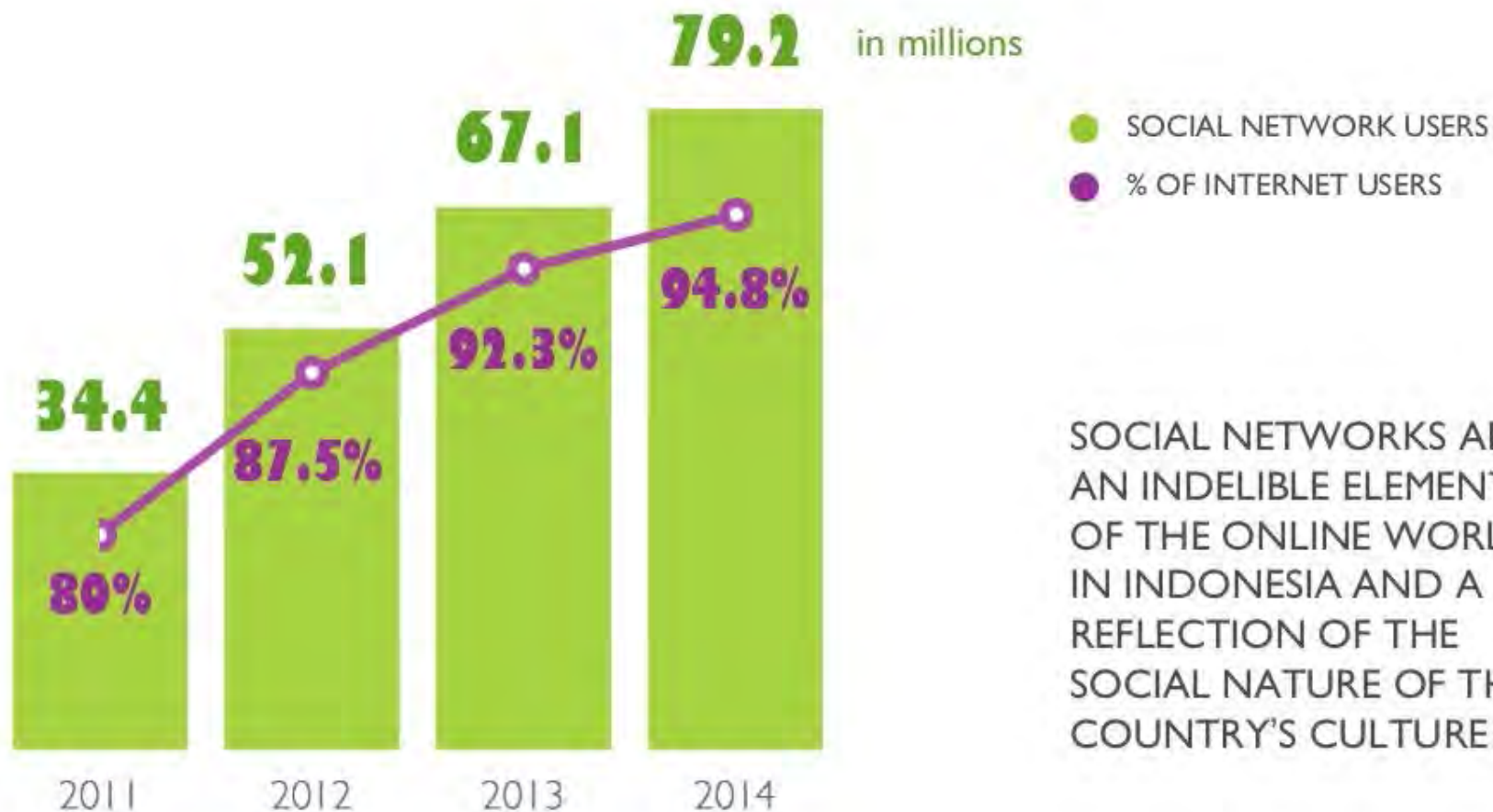
GROWTH IN
INDONESIAN MOBILE
USAGE IN THE COMING
YEARS IS LIKELY TO COME
FROM SOCIAL MEDIA &
ENTERTAINMENT

Source: InMobi, Mobile Media Consumption-Indonesia

04

SOCIAL NETWORK

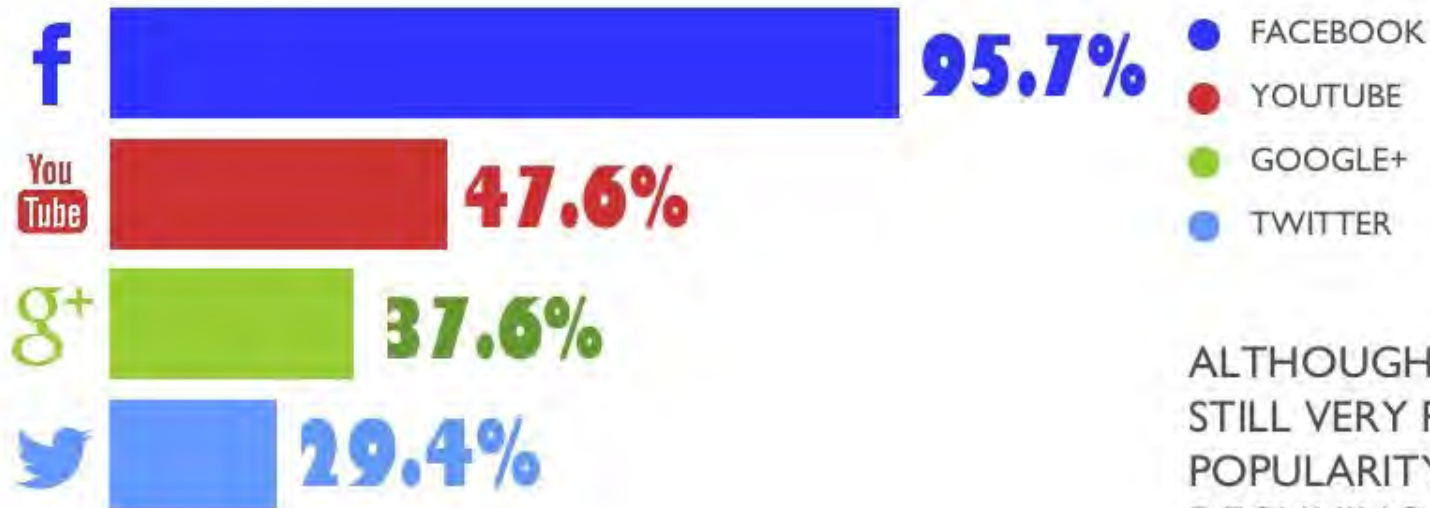
SOCIAL NETWORK



Source: eMarketer, August 2012

SOCIAL NETWORKS ARE AN INDELIBLE ELEMENT OF THE ONLINE WORLD IN INDONESIA AND A REFLECTION OF THE SOCIAL NATURE OF THE COUNTRY'S CULTURE

SOCIAL NETWORK USED



% of respondents, Social Networks Used by Social Network Users in Indonesia in the past week

Source: BBG and Gallup, October 2012

ALTHOUGH FACEBOOK IS STILL VERY POPULAR, IT'S POPULARITY MAY BE DECLINING, AMONG THE DIGITALLY SAVVY USER'S IN LARGER CITIES WHO ARE TURNING TO PATH



FACEBOOK



● MONTHLY ACTIVE USERS

INDONESIA IS THE
FOURTH BIGGEST
FACEBOOK COUNTRY

Source: Social Bakers, 2013



YOUTUBE

1 BILLION UNIQUE USERS
PER MONTH

6 BILLION VIEWS
PER MONTH

18 MINUTES TIME ON SITE
PER SESSION

900,000 HOURS OF VIDEO VIEWED
PER DAY

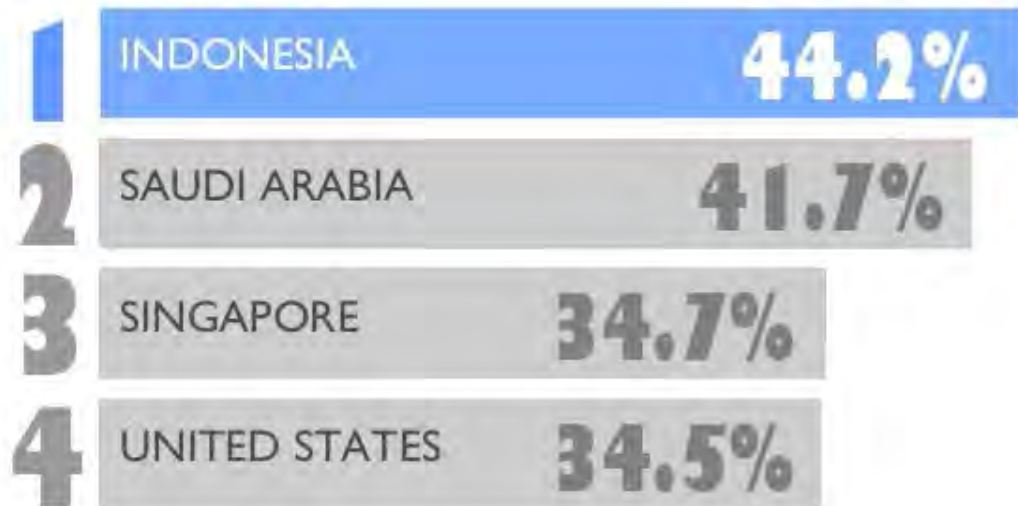
22% OF VIEWS
COME FROM MOBILE



Source: YouTube, 2013



TWITTER



Source: GlobalWebIndex, April 2013

● ACCOUNT GROWTH

INDONESIA IS THE COUNTRY WITH THE BIGGEST GROWTH OF TWITTER ACCOUNTS

IT HAS CLOSE TO 30 MILLION TWITTER ACCOUNTS



GOOGLE+



● GOOGLE+ USERS

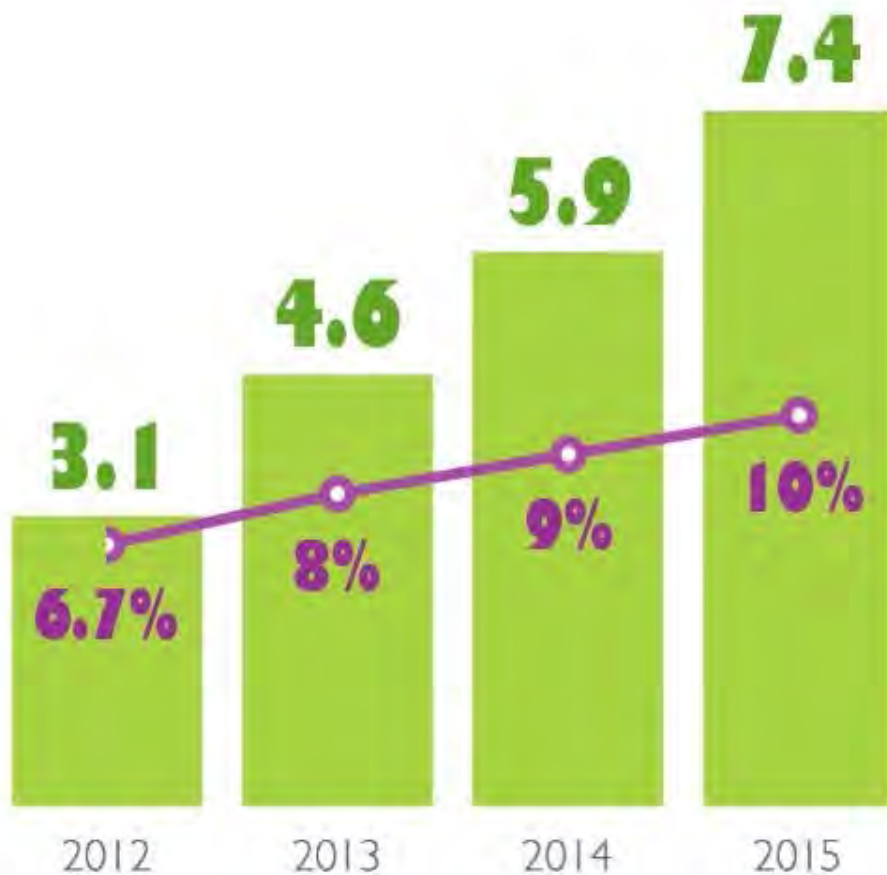
INDONESIA IS THE FIFTH
BIGGEST GOOGLE+
COUNTRY

Source: GPlusData, September 2013



E-COMMERCE

DIGITAL BUYERS



- DIGITAL BUYERS IN INDONESIA
 - % OF INTERNET USERS
- in millions

BY THE END OF 2015
THERE WILL BE 7.4
MILLION DIGITAL BUYERS,
OR EQUAL TO ONLY 10%
OF INTERNET USERS

Source: eMarketer, January 2013

B2C SALES



● B2C E-COMMERCE SALES

● % OF CHANGE

in billions

E-COMMERCE HAS NOT TAKEN ROOT IN INDONESIA YET, BECAUSE OF:

- Lack of delivery infrastructure
- Unfamiliarity with online payment
- Worries about security

Source: eMarketer, January 2013

REASONS NOT TO BUY ONLINE



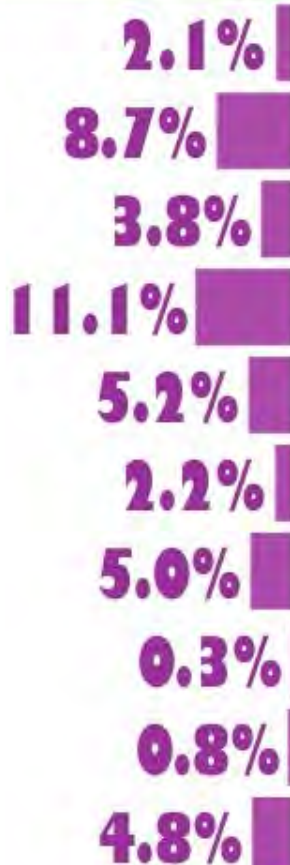
Source: APJII, Profil Internet Indonesia, December 2012

MOST BOUGHT PRODUCTS

female



77.1%



CLOTHING



HANDPHONE



TICKET FOR TRIP/SHOW



NOTEBOOK/ACCESSORIES



BAGS



BOOKS



ELECTRONIC GADGETS



SHOES



COSMETIC



BOOKING/HOTEL RESERV.



TOYS FOR CHILDREN



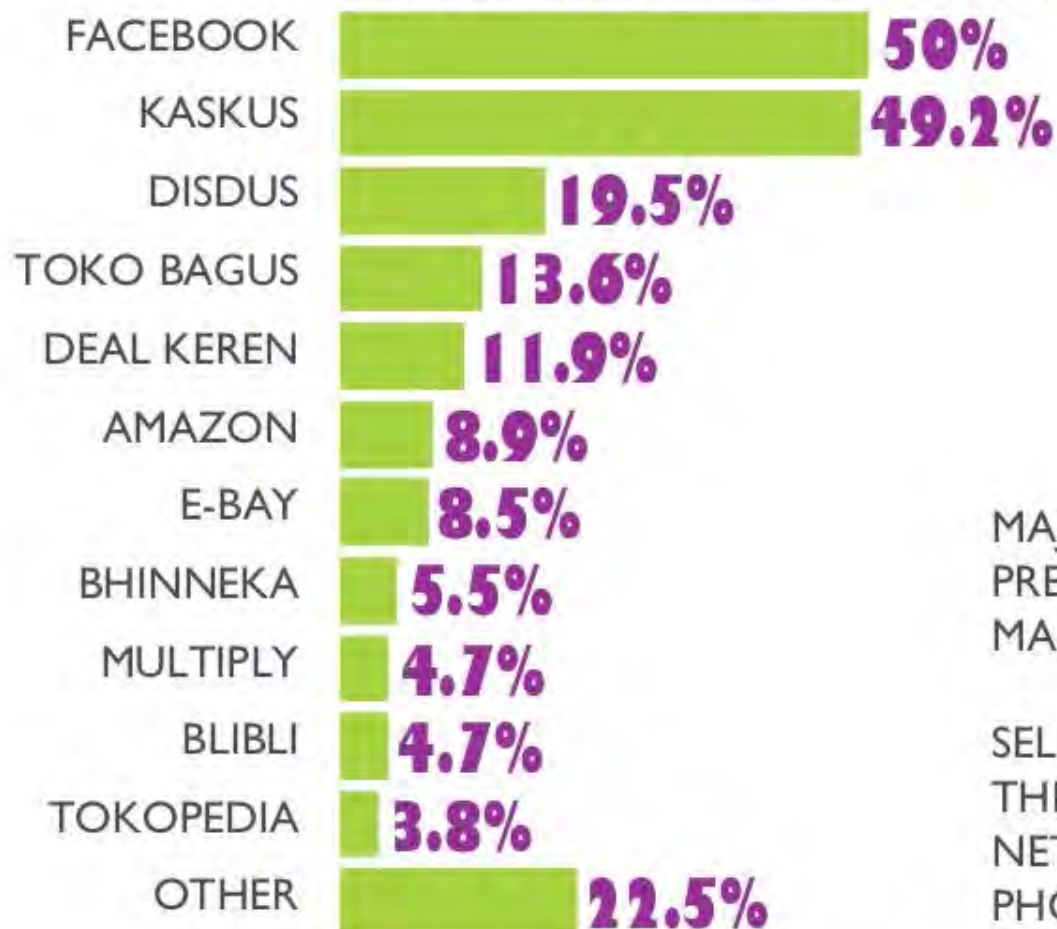
male

39.1%



MOST USED E-COMMERCE SITES

SITES USED TO MAKE ONLINE PURCHASE

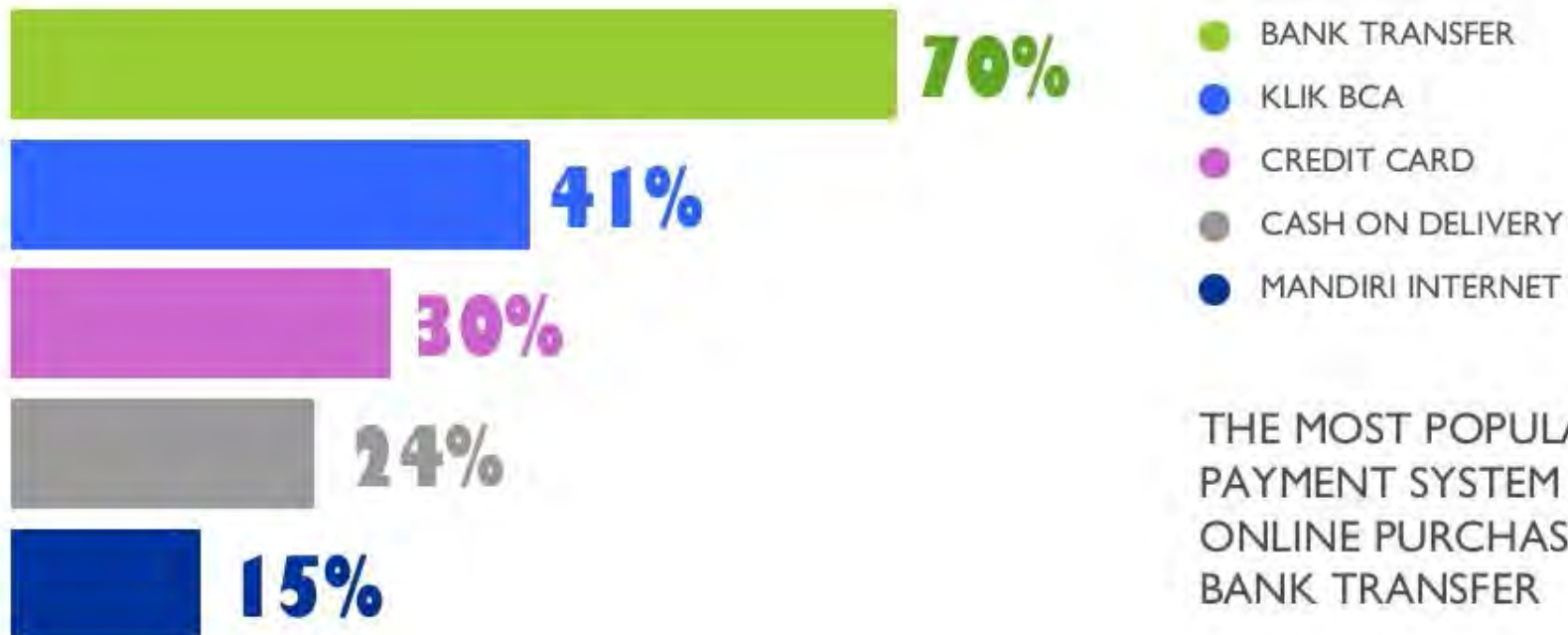


MAJORITY OF DIGITAL BUYERS STILL PREFER PEER-TO-PEER MARKETPLACE,

SELLER AND BUYER NEGOTIATE THROUGH ANY NUMBER OF NETWORKS, INCLUDING REGULAR PHONE CALL OR SMS, FACEBOOK, BBM, WHATSAPP AND TWITTER

Source: Venitrans and DailySocial, eCommerce in Indonesia, August 2012

PAYMENT



THE MOST POPULAR
PAYMENT SYSTEM FOR
ONLINE PURCHASES IS
BANK TRANSFER

Source: Veritrans and DailySocial, eCommerce in Indonesia, August 2012

