

HOW TO REACH Indonesian



@Dwirianto

Portfolio based on Industries

COMMUNITY/MEDIA

Leverage The Power of Community



MINDTALK



lintas.me
Discover Your World

OPINI.id

DailySocial
Indonesian Tech Startup Media

TRENOLOGI

BOLALB soccer talk

ENTERTAINMENT

Provide value-added



KASKUS
THE LARGEST INDONESIAN COMMUNITY
RADIO

COMMERCE

Enhance Economic Growth via e-Commerce



blibli.com
ANYTIME, ANYWHERE SHOPPING !

Infokost.net

PLATFORM

Enabling Seamless Connectivity



AD TECHNOLOGY



PAYMENT



A group of young women are gathered around a table in a bar, looking at a tablet held by one of them. The tablet displays a group photo of the same women. The scene is dimly lit, with warm lighting from the bar. There are glasses of beer on the table. The word "OVERVIEW" is overlaid in large white letters on the right side of the image.

OVERVIEW

Total Addressable Market: Indonesia



Home to 4th Largest Population



Average spending on e-Commerce

80
MILLION+
Internet Users

Highest In
SEA

Expected to Rise to
95
MILLION
Users by 2015



Total digital advertising spending of

US\$1,2^{Bio}

With leading CAGR of

75%
Highest

in the APAC region,
projected to surpass
India by 2016.



30%

Population under
15 years old



50%

Under 30 years old

Which will drive the internet scene in year to come.

Snapshot



(4th world rank) **255,461,124**
Total Population



51% Urban & 49% Rural

(6th world rank) **83,600,000**
Internet Users



33% Internet Penetration

(3rd world rank) **69,000,000**
Facebook Users



27% Facebook Penetration

281,963,665
Active Mobile Subscription



112% Mobile Subscription Penetration

Internet Indicators



5H 27M

Avg Time That Internet Users Spend Using The Internet Each Day Using Desktop/Notebook



14%

Mobile Internet Penetration of Total Population



2H 30M

Average Time Mobile Internet Per Day

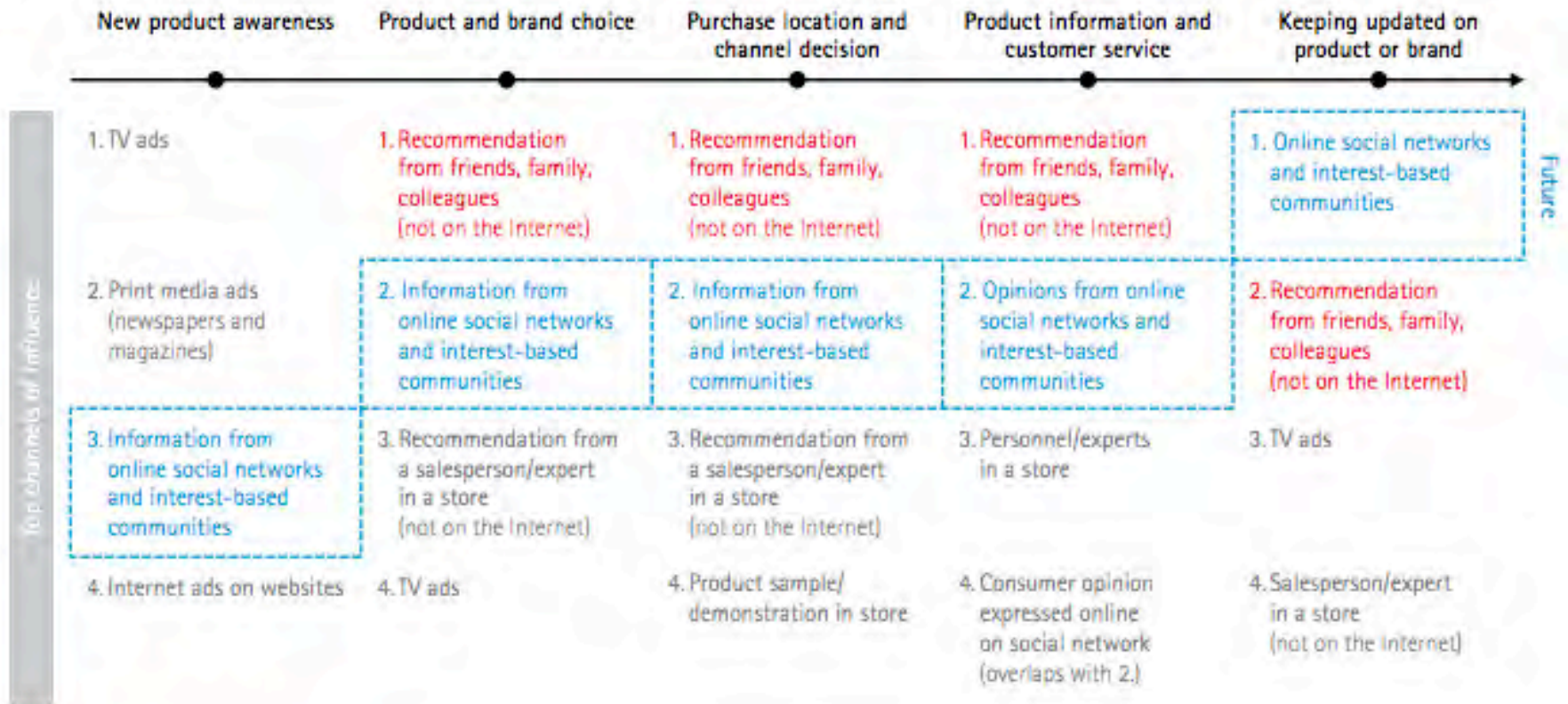


YOUTH BEHAVIOR AND HABITS



Consumer Journey from Discovery to Purchase

Future consumer purchase journey - top avenues of influence



Offline community influence

Online community influence

(Illustrative Accenture Analysis)

INDIVIDUALS



MULTICHANNEL NETWORKS



Individual websites/
landing pages created
by individuals
(typically fans)

Participation in
discussion forums

Blogs

Podcasts (audio
then video)

More sophisticated
interactions via social
media (Facebook, Twitter),
videos (YouTube & Vimeo),
Wikis, photography
(Instagram), evolved
'snackable', decentralised
forms of UGC (Snapchat)

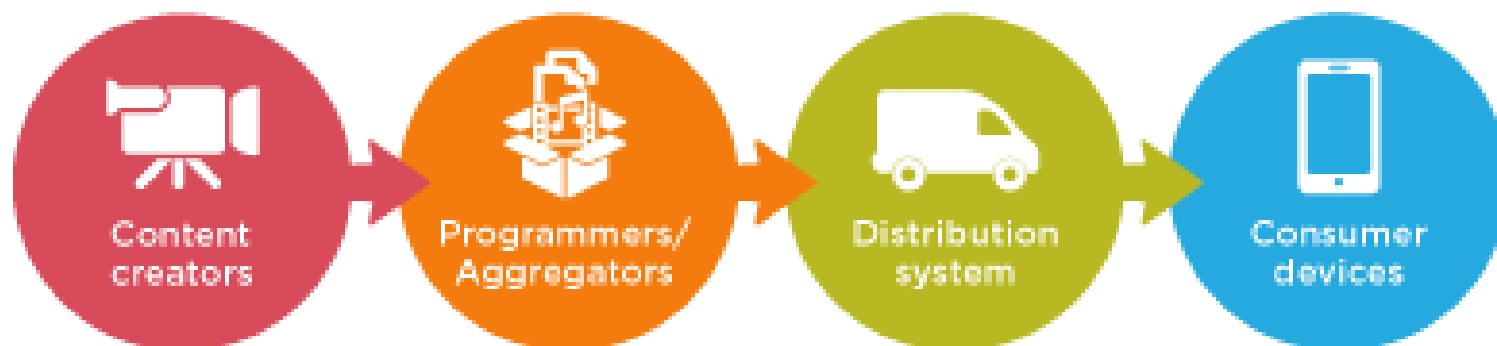
WEB 1.0
Information dissemination

WEB 2.0
User Generated Content (UGC)
for social and connection

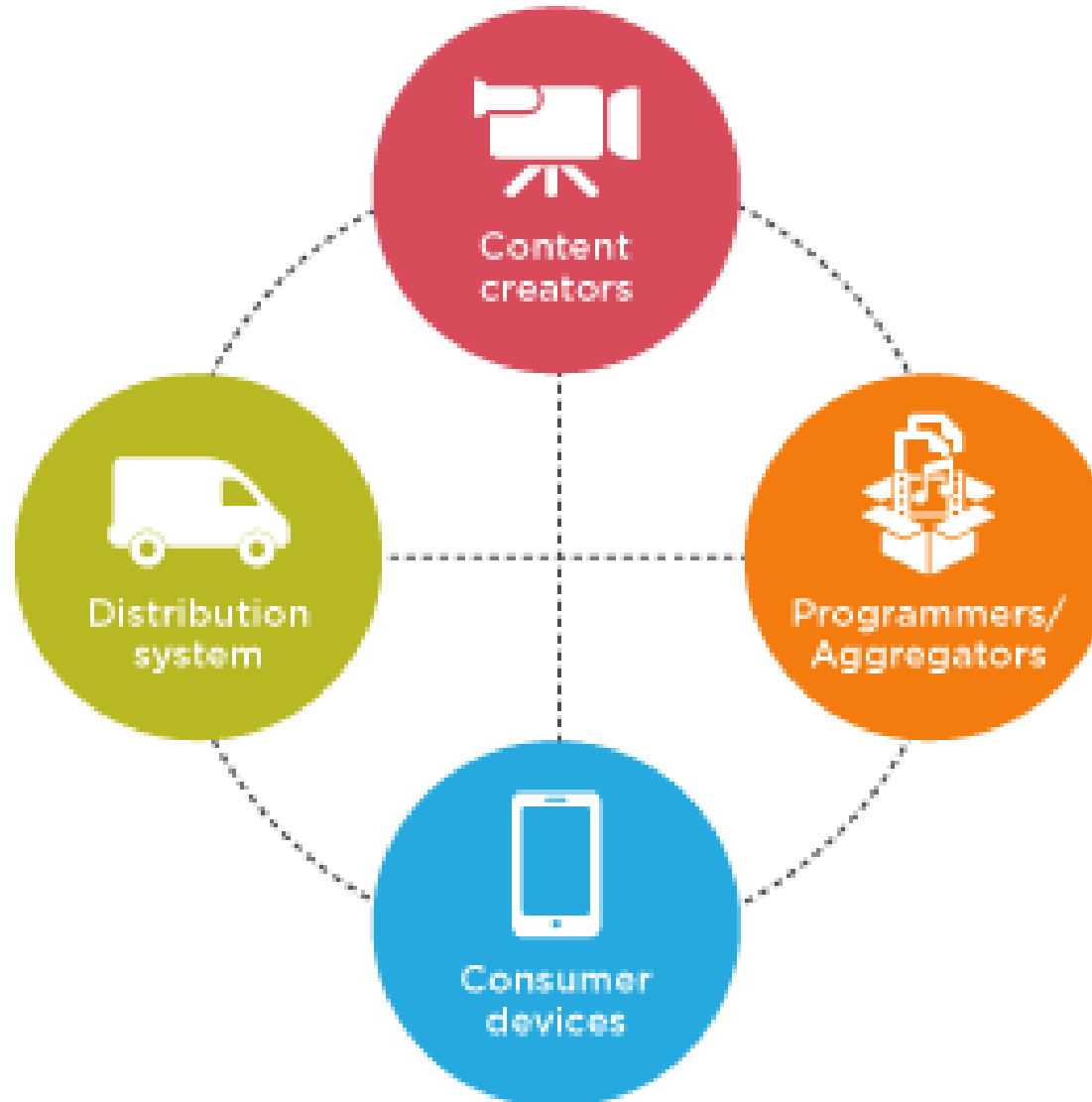
WEB 3.0
User Generated Assets
(UGA) and commerce



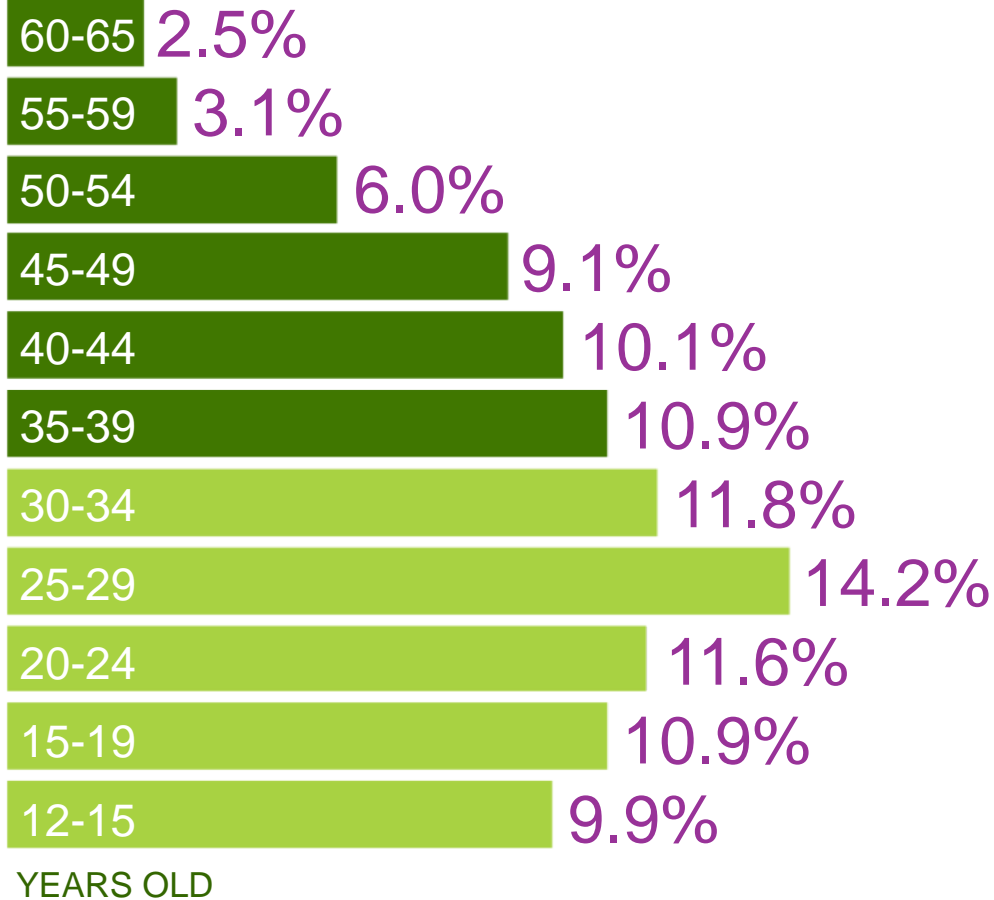
THE TRADITIONAL ENTERTAINMENT AND MEDIA VALUE CHAIN



THE EVOLVING ENTERTAINMENT AND MEDIA VALUE CHAIN



DEMOGRAPHICS BY AGE



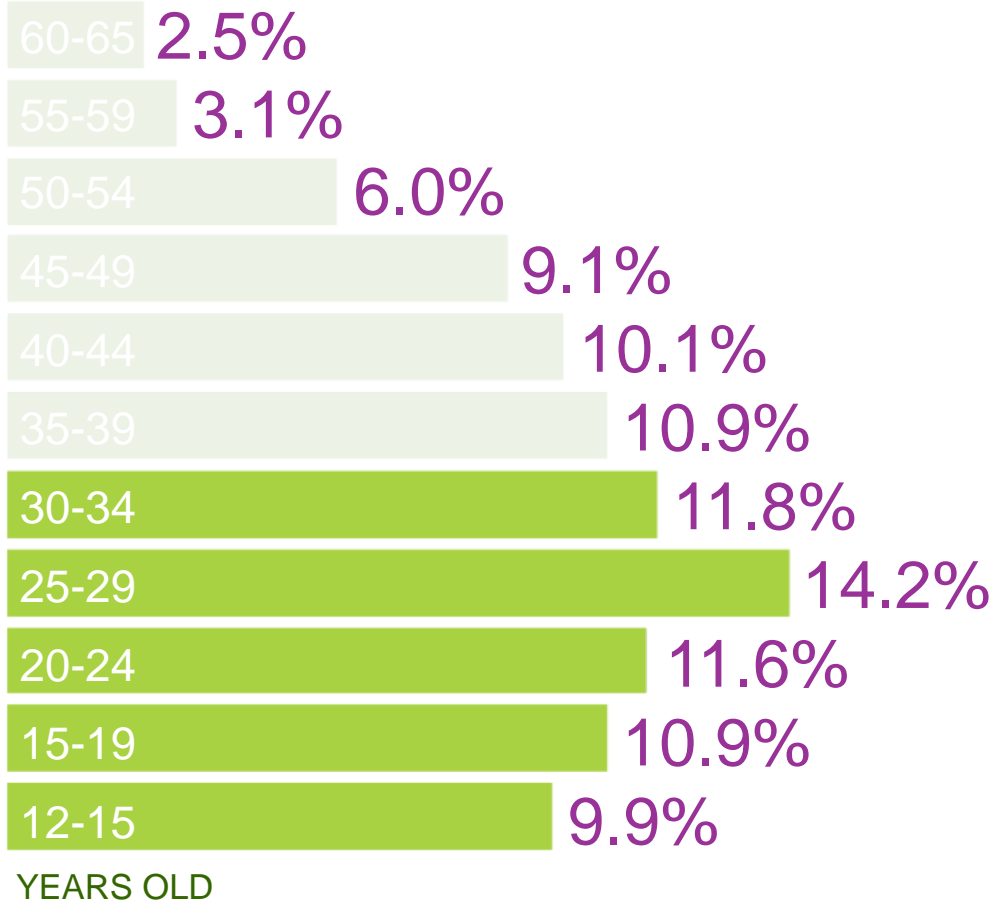
● DIGITAL IMMIGRANT

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



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



Entertain
Me!

Curious

Easy.
I am Lazy

Hear Me
Out!

What is
in it for
me?

In Group

Emotionally Insecure



Intan Saputri @intsap

Galau banget inget Breaking Dawn semalem.. #infopenting

Collapse Reply Retweet Favorite

Narcism
and Circle of Peers is IMPORTANT



Giofani Lutfiana

LOOK TO THE KOTAK KANAN BAWAH. LOOK TO THE MAKHLUK ABOVE ME

Existence is meaningful

si model lebih terlihat pisah sama tanah. :) twitpic.com/bezky
Hide photo Reply Retweet Favorite

High Angle

Kaki Tidak Terlihat
Pisah dengan Tanah



Low Angle

Kaki Terlihat Jelas
Pisah dengan Tanah



By GUNTUR Baharjo @GUNTURbaharjo



Like Comment Share about an hour ago 21

Latest Update



Benazio Rizki Putra @benakribo

8h

@riezalinda nggak nih lagi nyobain mall baru, lippo mall kemang village biar makin gaul! Sini aje! Haha

View conversation



CONVERSATION
INFORMATION
GAMIFICATION
IDENTITY
AFFILIATION
UTILITY



MINDTALK

INTEREST

MEET UP

Space



Mobile Situation



281,963,665

Active Mobile Broadbands Subscription



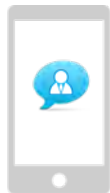
32%

Mobile Broadbands Subscription of Total Population



52M

Active Social Media Users Accessing from Mobile Device



21%

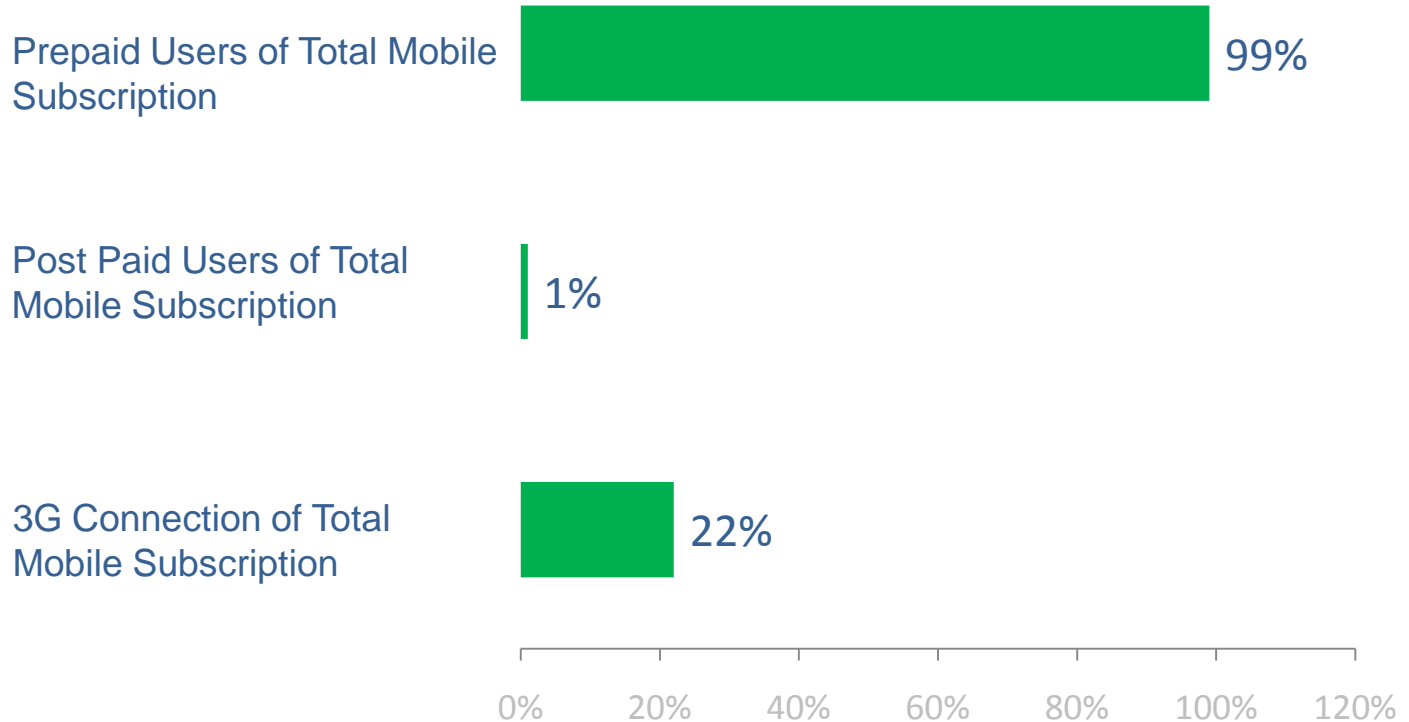
Penetration of Mobile Social from Total Population

Mobile Subscription



281,963,665

Active Mobile Subscription



Smartphone User Behavior



95.867.646

Smartphone Users

Smartphone Penetration as
% of Total Mobile
Subscription

34%

Smartphone Users Searching
for Local Information

94%

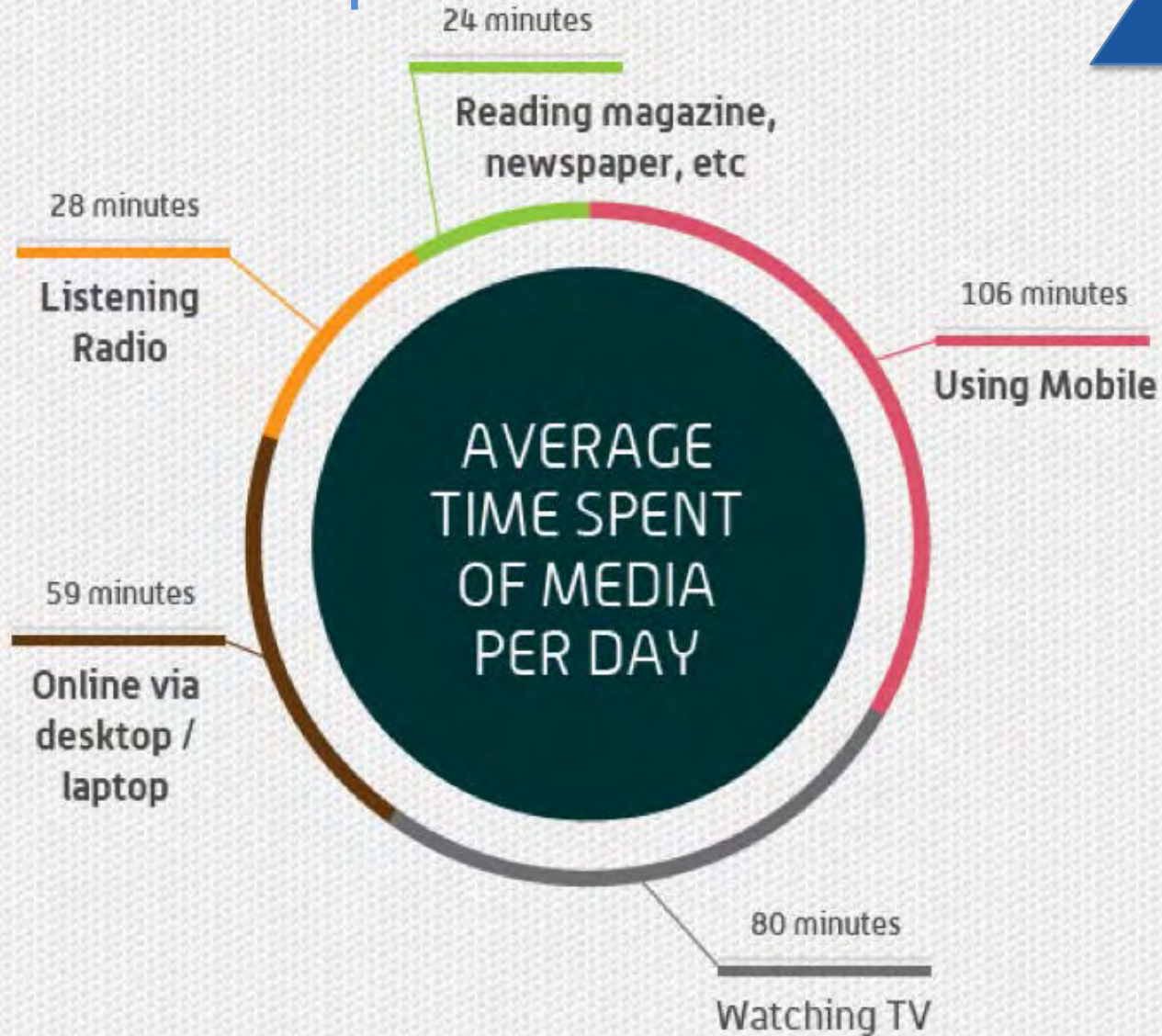
Smartphone Users Researching
Product/Service from Their
Phone

95%

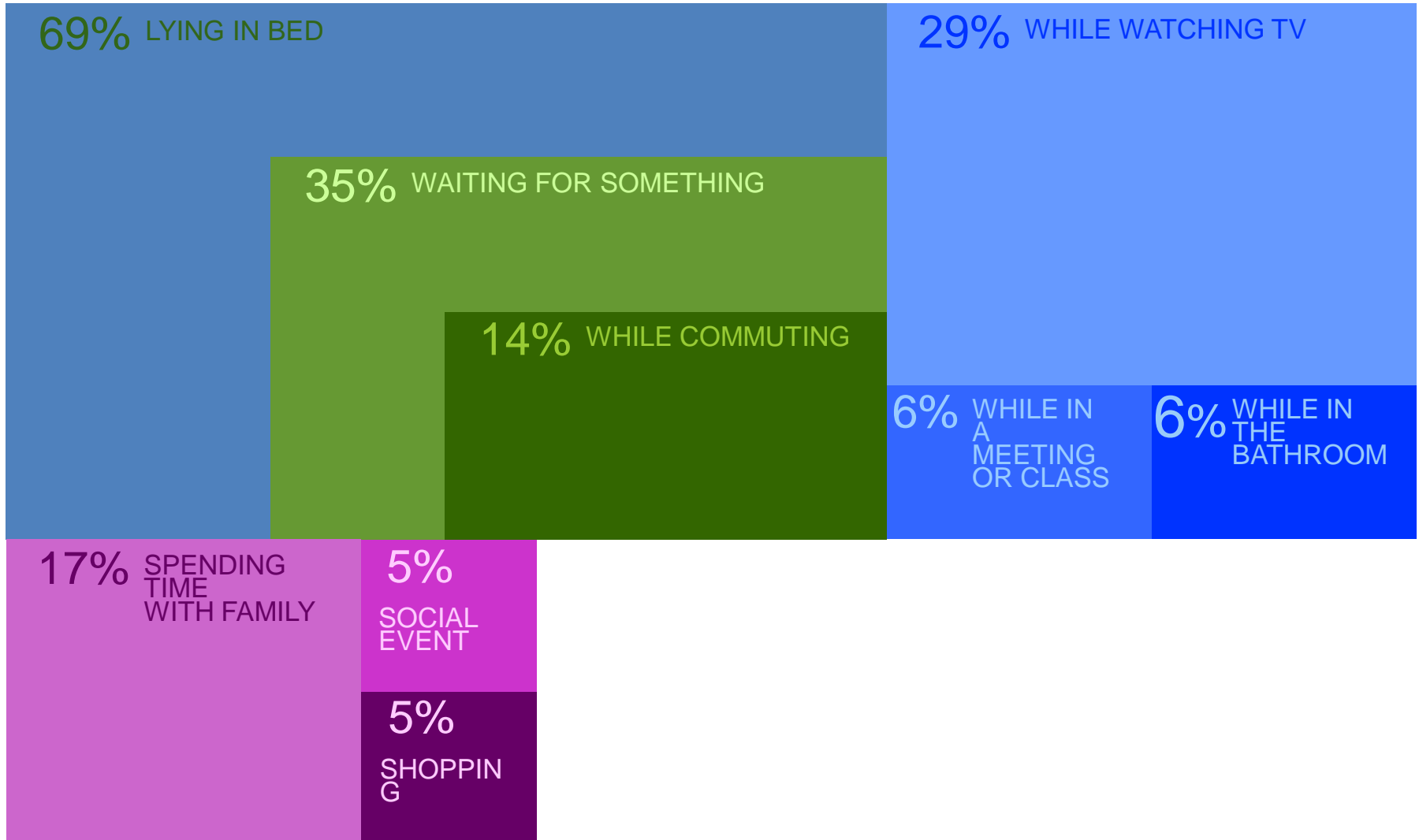
Smartphone Users Who Have
Purchased from Their Phone

57%

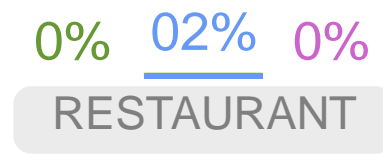
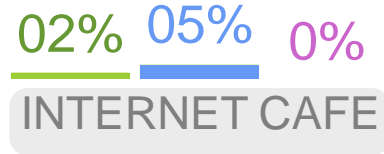
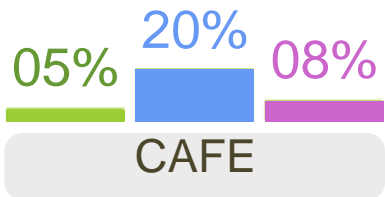
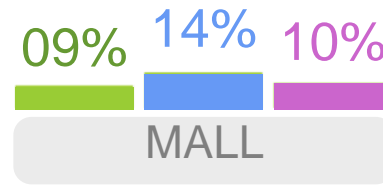
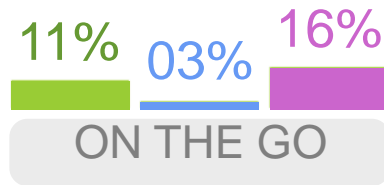
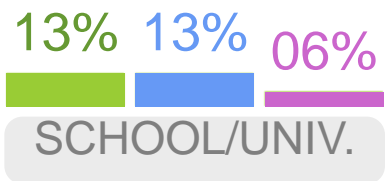
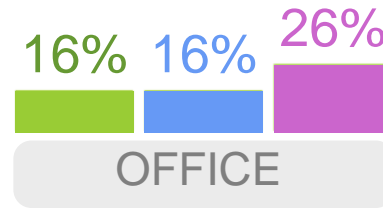
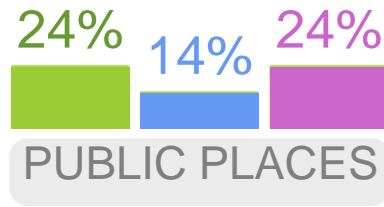
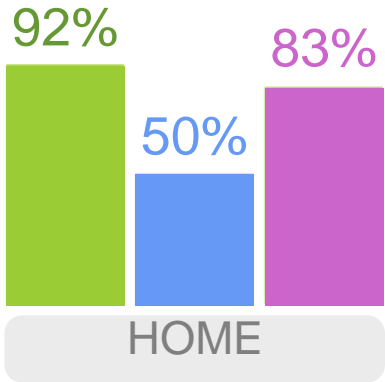
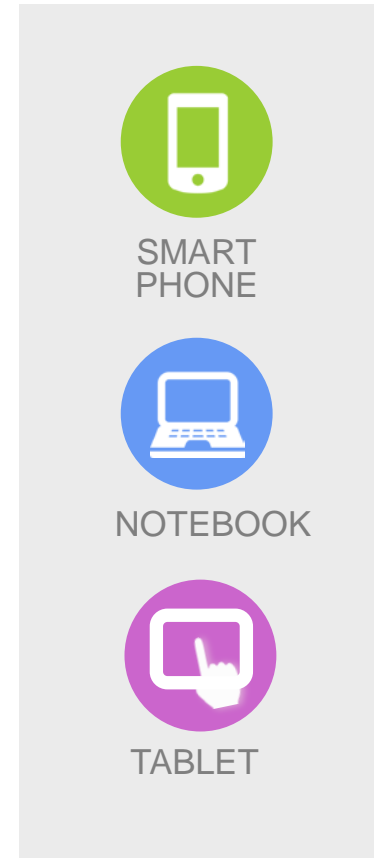
THEIR DAILY LIFE



Smartphone User Behavior



LOCATION BY DEVICE TYPE

- SMART PHONE
- NOTEBOOK
- TABLET



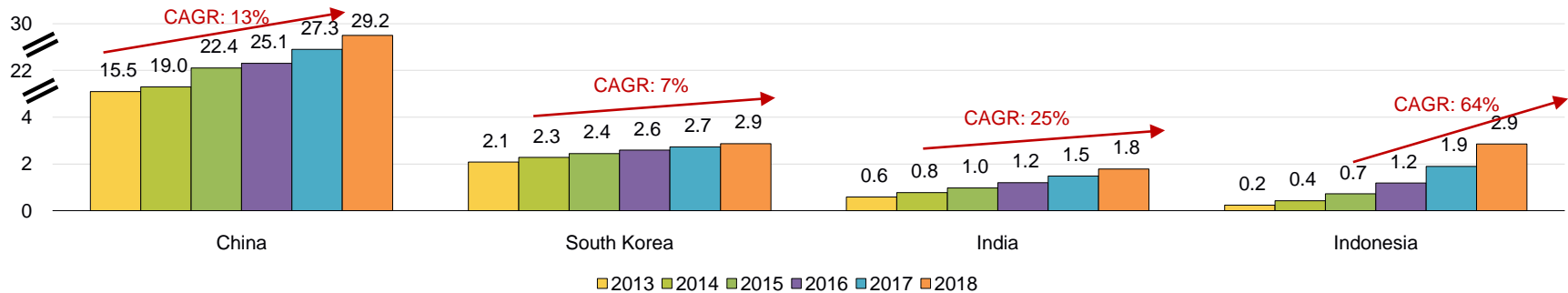
ADVERTISING

KASKUS
THE LARGEST INDONESIAN COMMUNITY
FORUM

Indonesia: No.1 Growth Market for Digital Ad Spend in APAC, Set to Overtake India

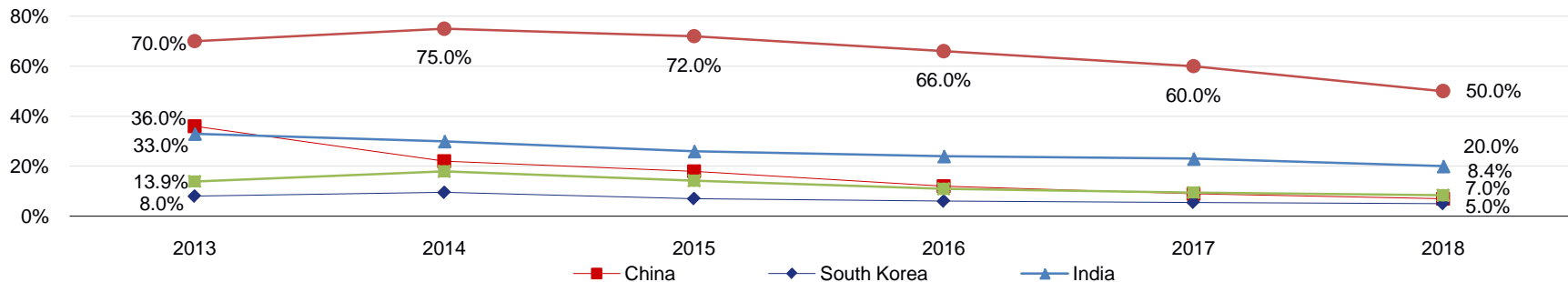
Digital Ad Spend: 2013-2018

USD BN



Source eMarketer, Jun 2014

Digital Ad Spending Growth Rate: 2013-2018

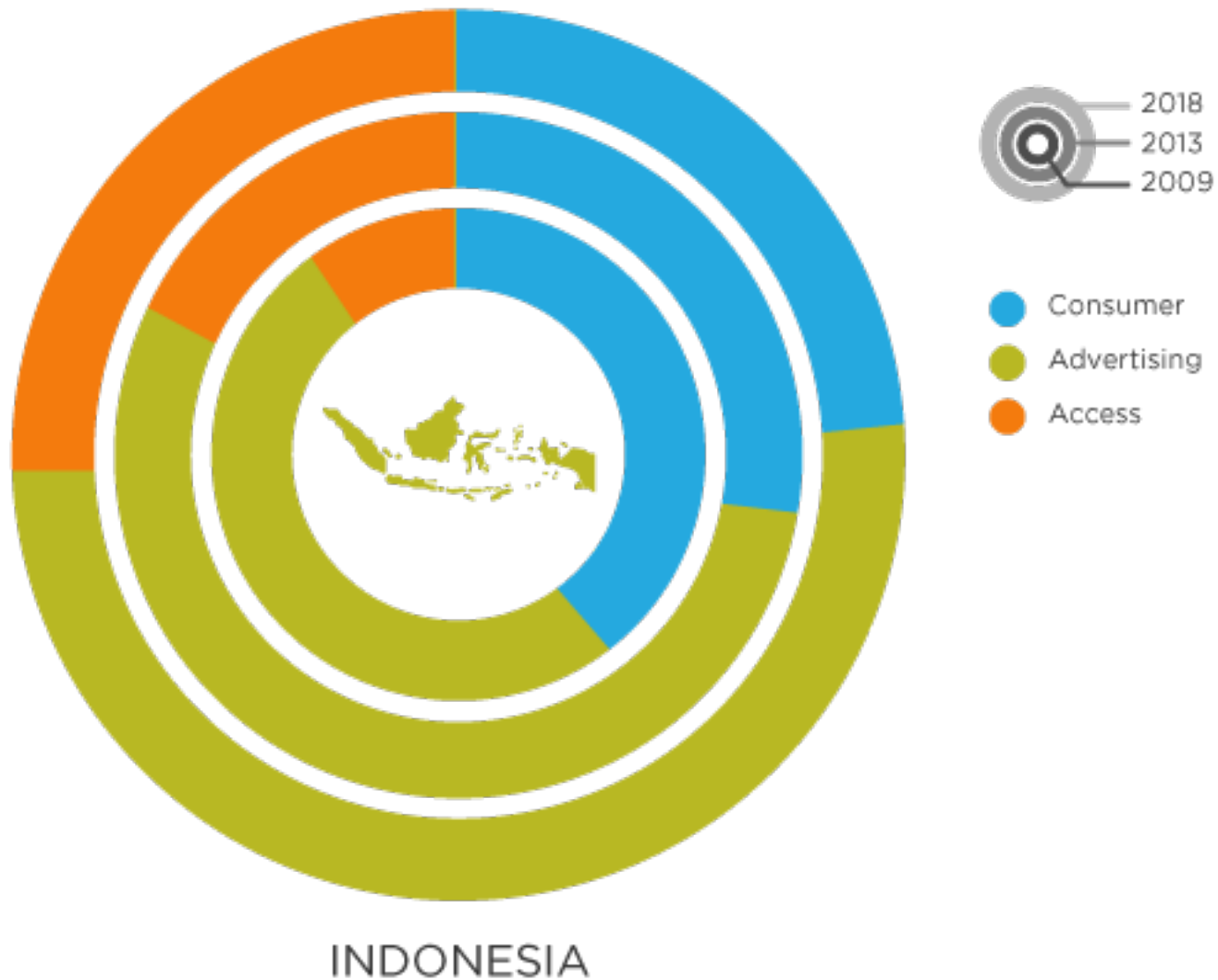


Source eMarketer, Jun 2014

Digital Ad Spend in Indonesia is expected to grow from USD 0.2 BN in 2013 to USD 2.9 BN in 2018 at 68% CAGR

- Notes
- Includes advertising that appears on desktop and laptop computers as well as mobile phones and tablets, and includes all the various formats of advertising on those platforms; excludes SMS, MMS and P2P messaging-based advertising
 - China excludes Hong Kong

BREAKDOWN OF INDONESIA MARKETS IN 2009, 2013, AND 2018, CONSUMER VS ADVERTISING VS ACCESS (%)





GDP
Venture

blibli.com
ANYTIME, ANYWHERE SHOPPING!

Commerce

Top Online Shopping Sites in Indonesia

Online Forum & Classified







B2C















Marketplace









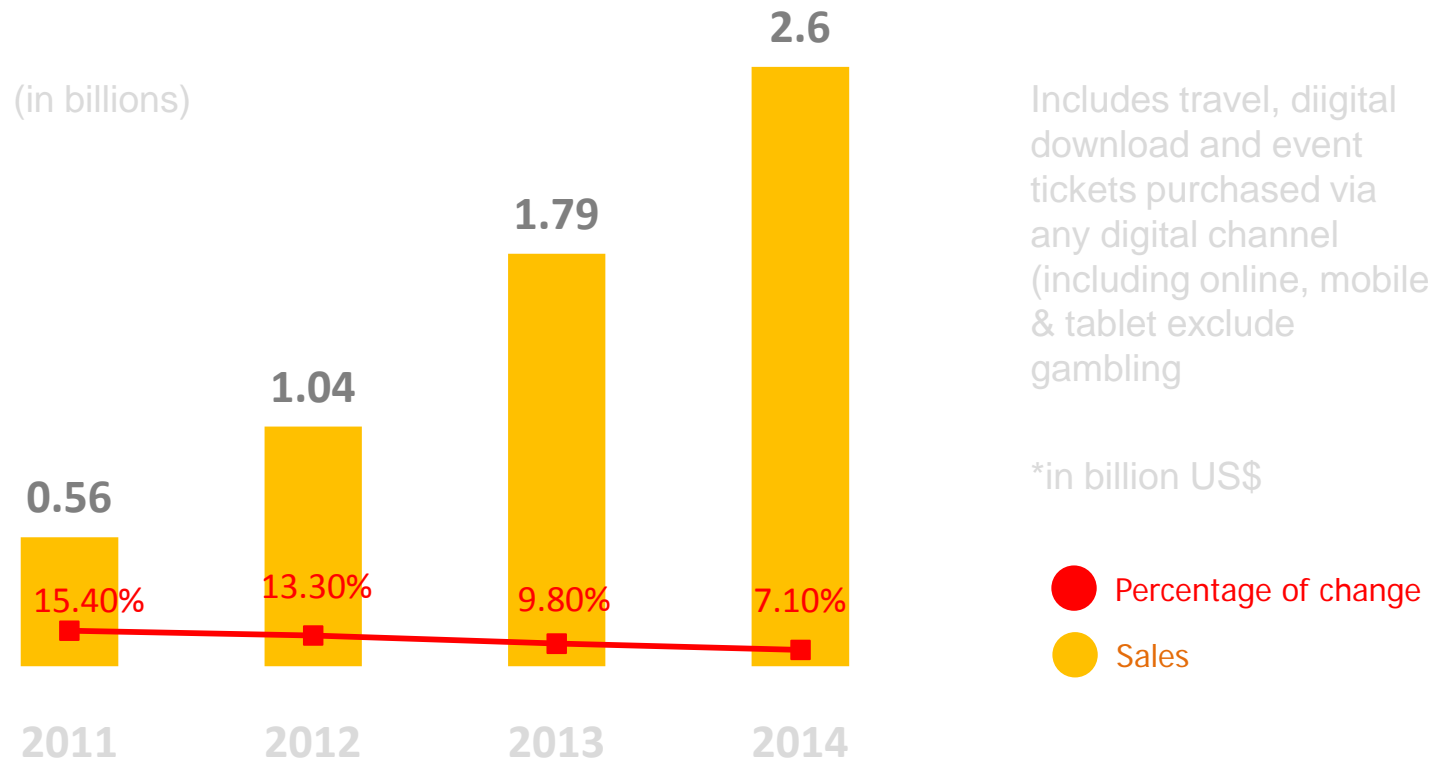




E-Commerce Competitive Map

By Country	B2C Marketplaces	B2C Multi-Brand Retailers	B2C Private Sales & Daily Deals	C2C Marketplaces & Classifieds
Singapore				
Thailand				
Indonesia				
Philippines				

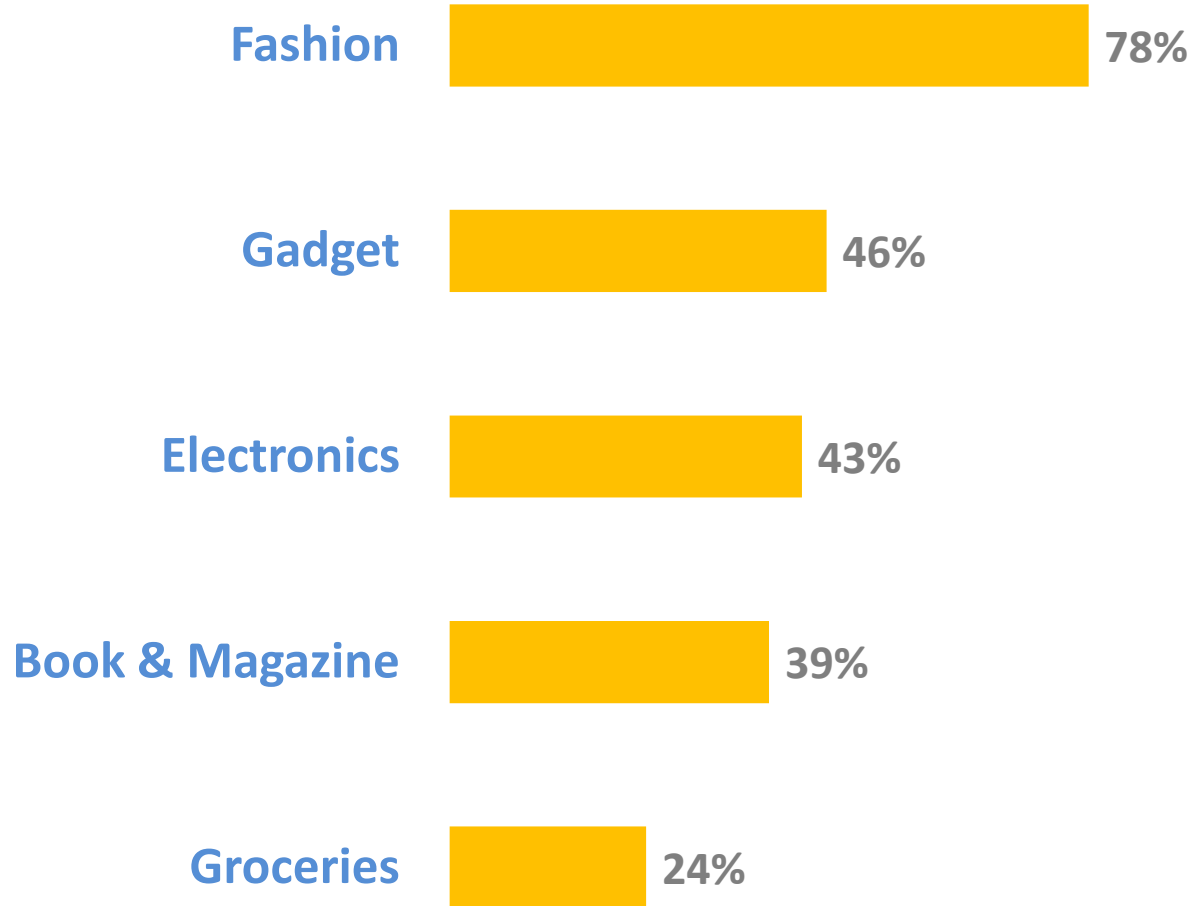
B2C eCommerce Sales in Indonesia

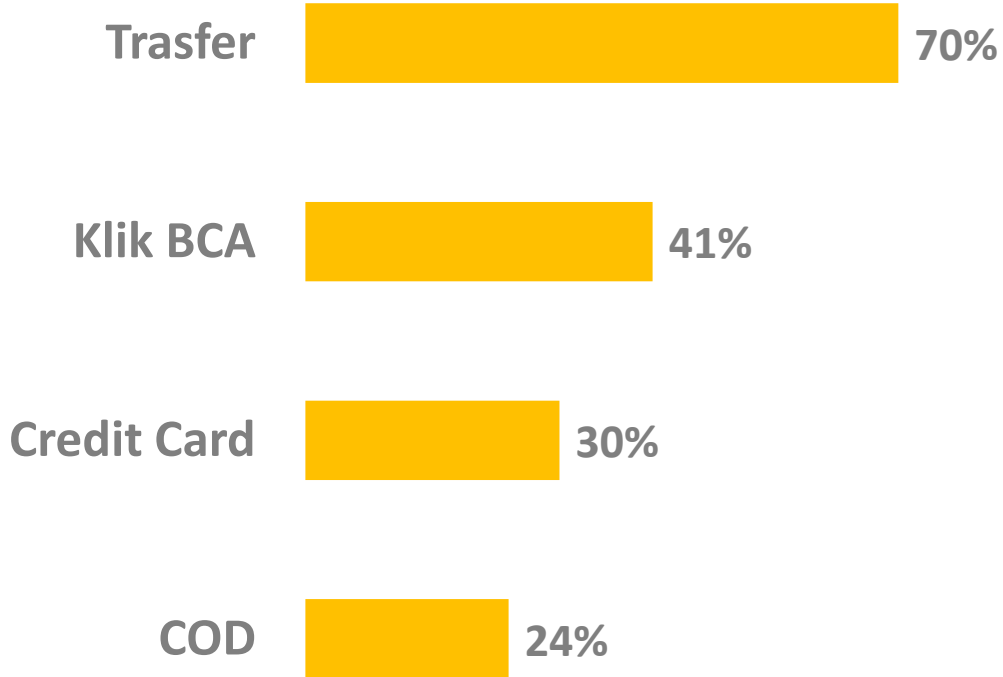


Top Three Drivers Of Online Shopping

- Look at the products online before purchasing in store
- Read online reviews prior to purchasing products
- Research product online prior to purchasing

Most Purchased Products





NOTE

Age 15+ include ATM payments, transfer of funds electronically to a specific bank account; transfer of money using the bank's proprietary electronic payment network

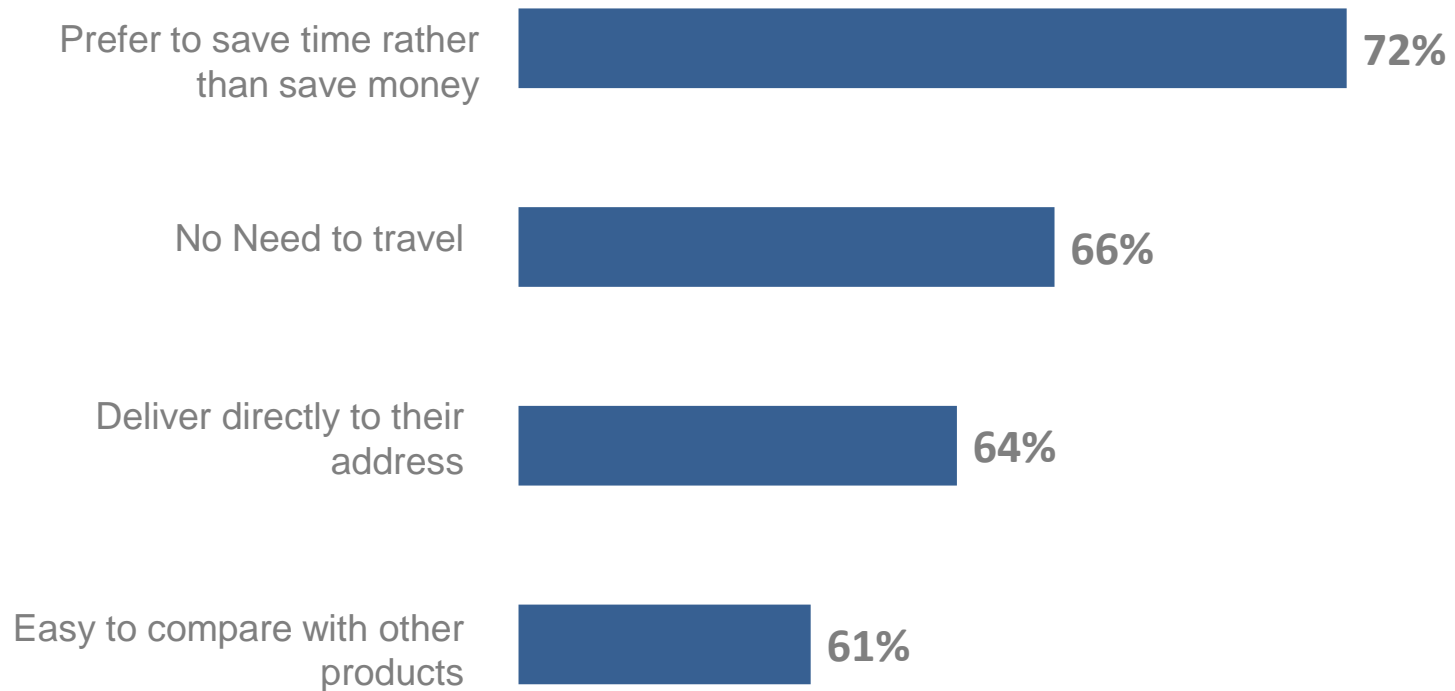
Companies like JNE, First Logistics and RPX are among the first to offer cash on delivery (COD) solution for e-commerce

BANK TRANSFER IS THE MOST POPULAR PAYMENT SYSTEM

Source: DailySocial; eMarketer

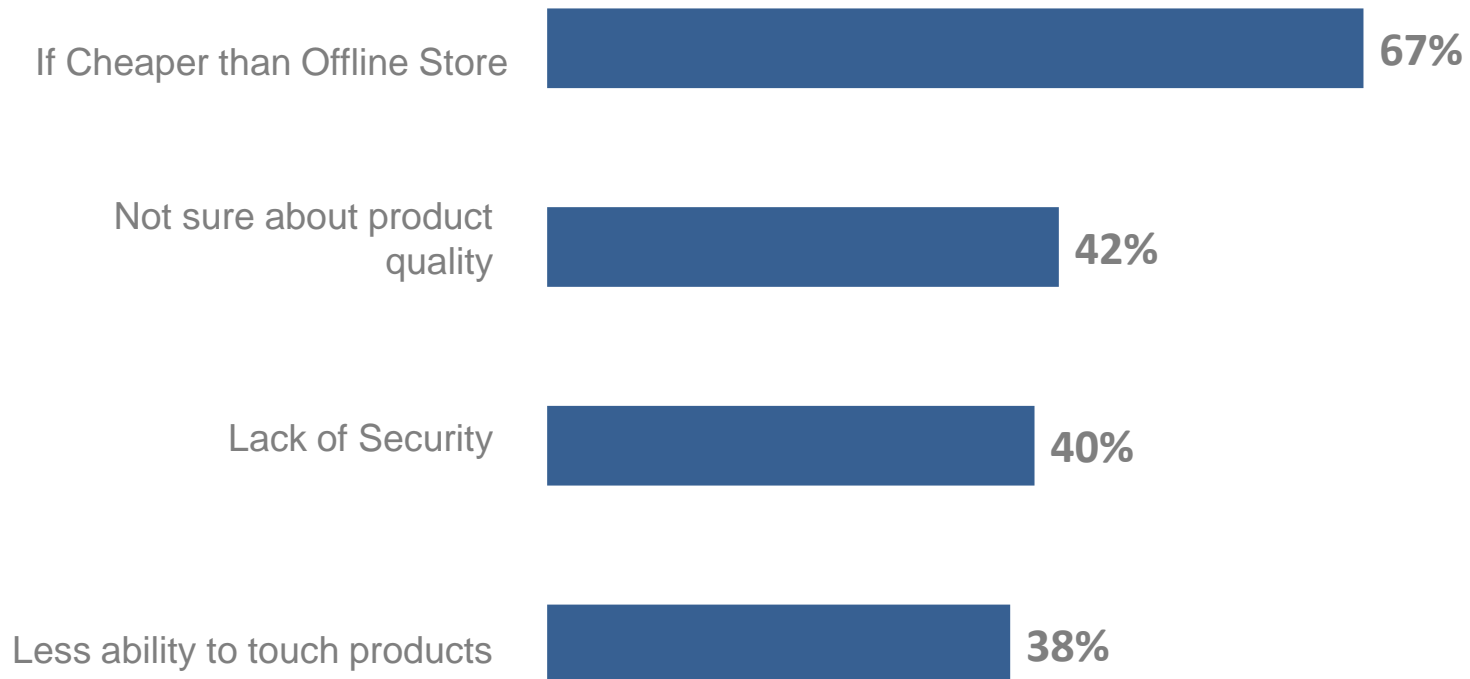
Online Shopping Considerations

RECENT ONLINE SHOPPER



Online Shopping Considerations

NON RECENT ONLINE SHOPPER





Content is the king

**distribution is
the King Kong**





Thank You

@Dwirianto