

The Nielsen logo, consisting of the word "nielsen" in a lowercase, sans-serif font with a dotted underline.

THE NEW TREND AMONG INDONESIA'S NETIZENS

How and where digital consumers are watching content online

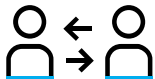
26 July 2017

SOURCES OF DATA

Consumer Media View



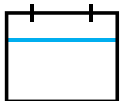
Mature Survey (since 1976)



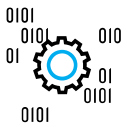
± **17,000** Face to face **age 10 and above**



11 Major Cities covering **53.3 Million** people in Indonesia (projected to BPS - Government Statistical Bureau Data)



Ongoing syndicated data released per quarter



Rich single-source data from Demography, Media Usage, Psychographic, Shopping Habit, and up to more than 200 categories of product usage.

Cross-Platform Report

GENDER



59%



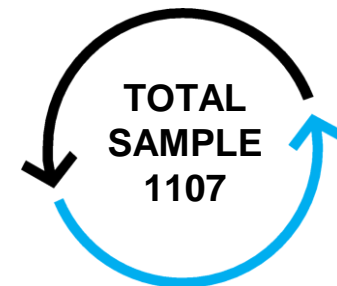
41%



ONLINE SURVEY

AGE

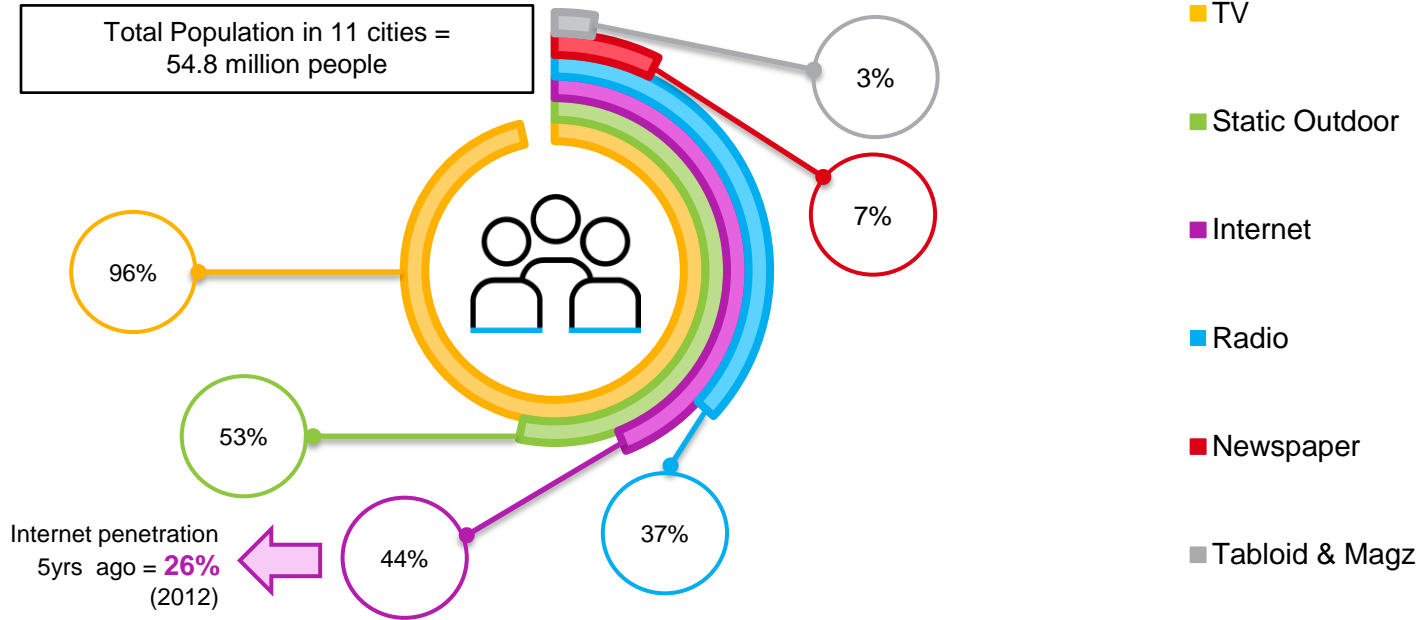
| | |
|-------------------|-----|
| 16 to 24 years | 45% |
| 25 to 34 years | 31% |
| 35 to 44 years | 17% |
| 45 years and over | 7% |



Cross-platform survey conducted among frequent online user (use internet in\ past 1 month)

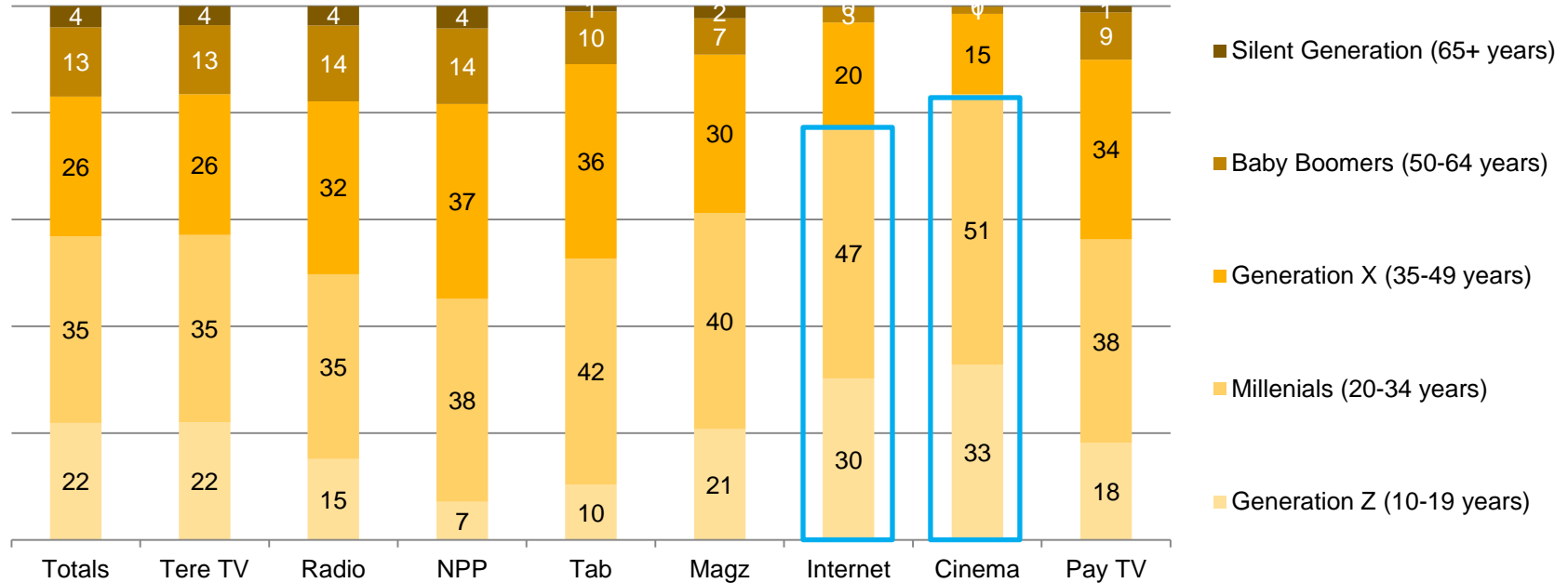
MEDIA PENETRATION

Internet is now on 3rd position among all media with 44% reach or equivalent with 24.2 million people



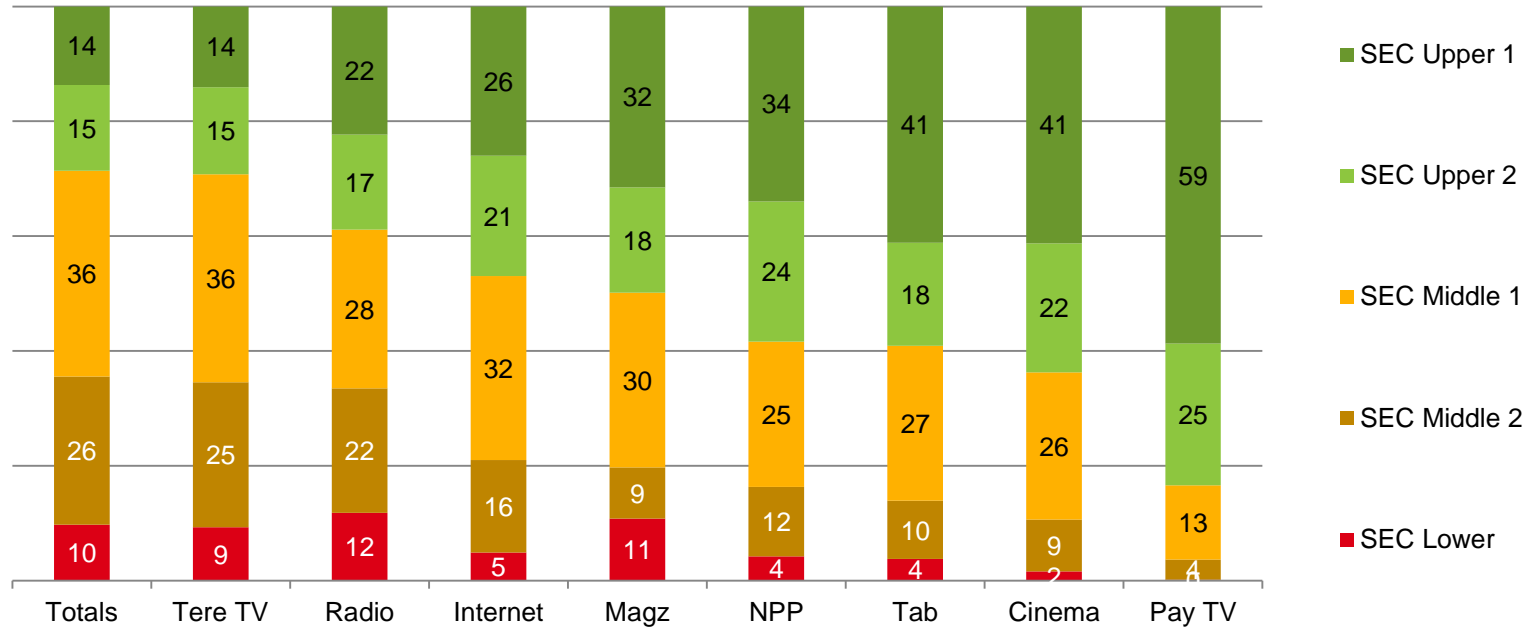
MEDIA PROPORTION BY GENERATION

Cinema & Internet are mostly consumed by younger generation



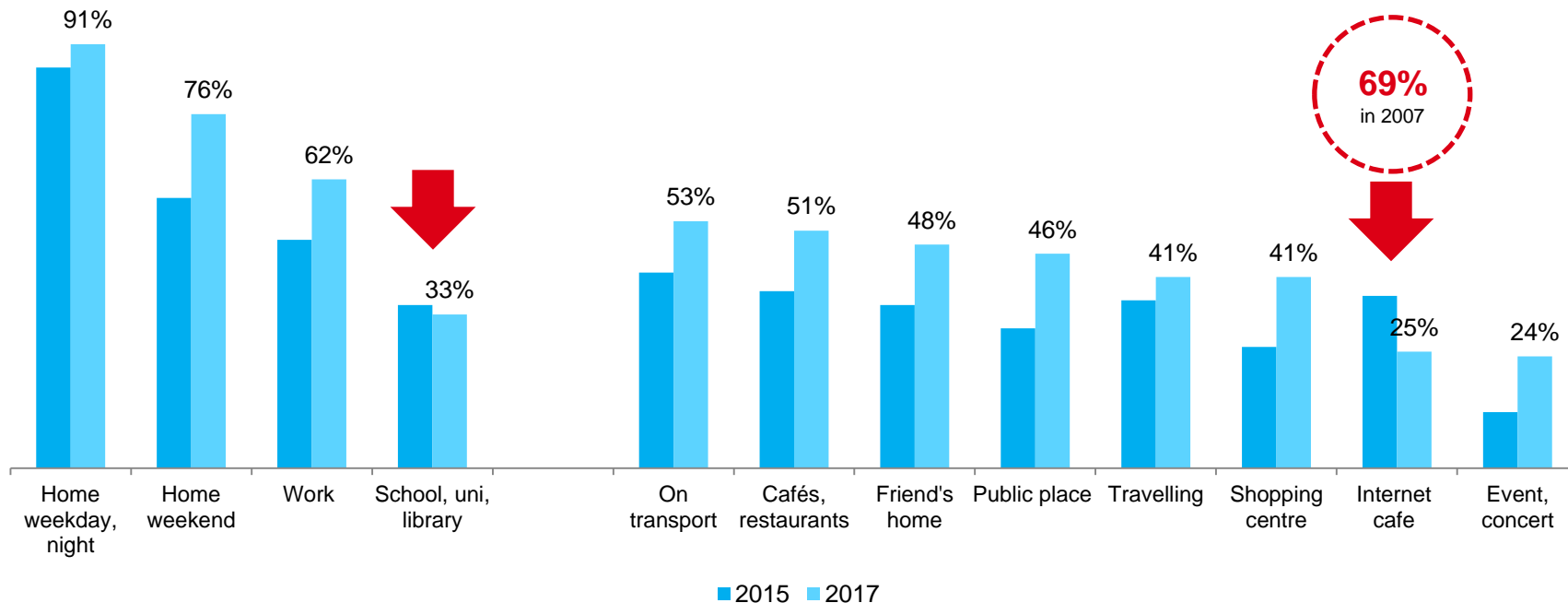
MEDIA PROPORTION BY SOCIO-ECONOMIC CLASS

Paid media is more consumed by higher class



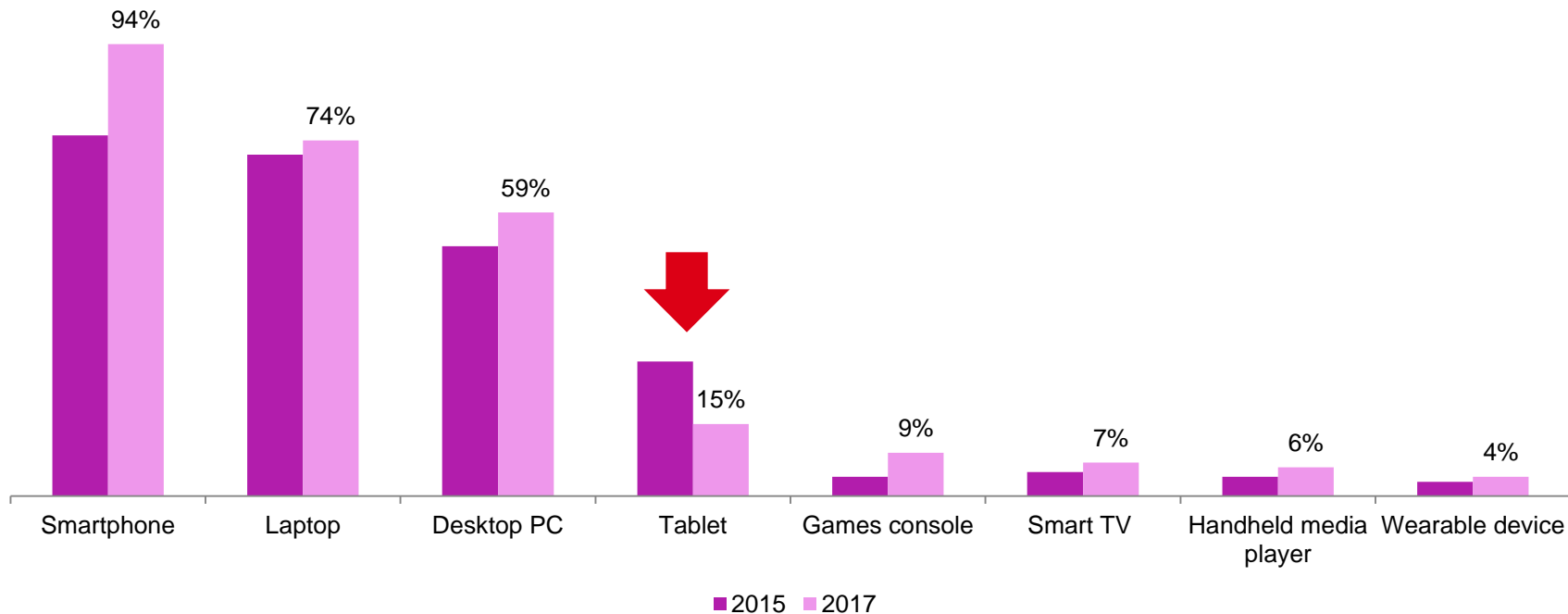
WHERE DO PEOPLE MOST REGULARLY ACCESS?

Access from Home is highest, while public places are increasing



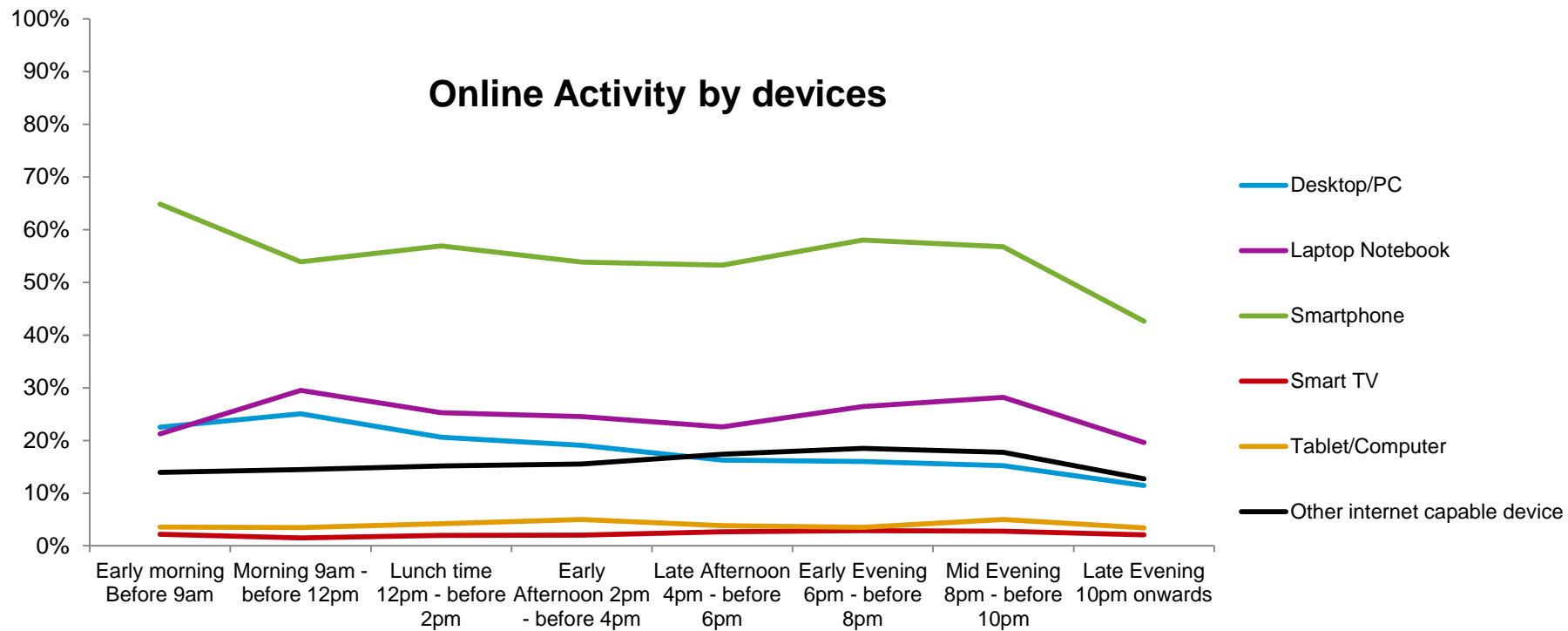
WHAT DEVICES ARE USED TO ACCESS THE INTERNET?

Smartphone is highest and usage is growing rapidly, while the use of Tablet is decreasing



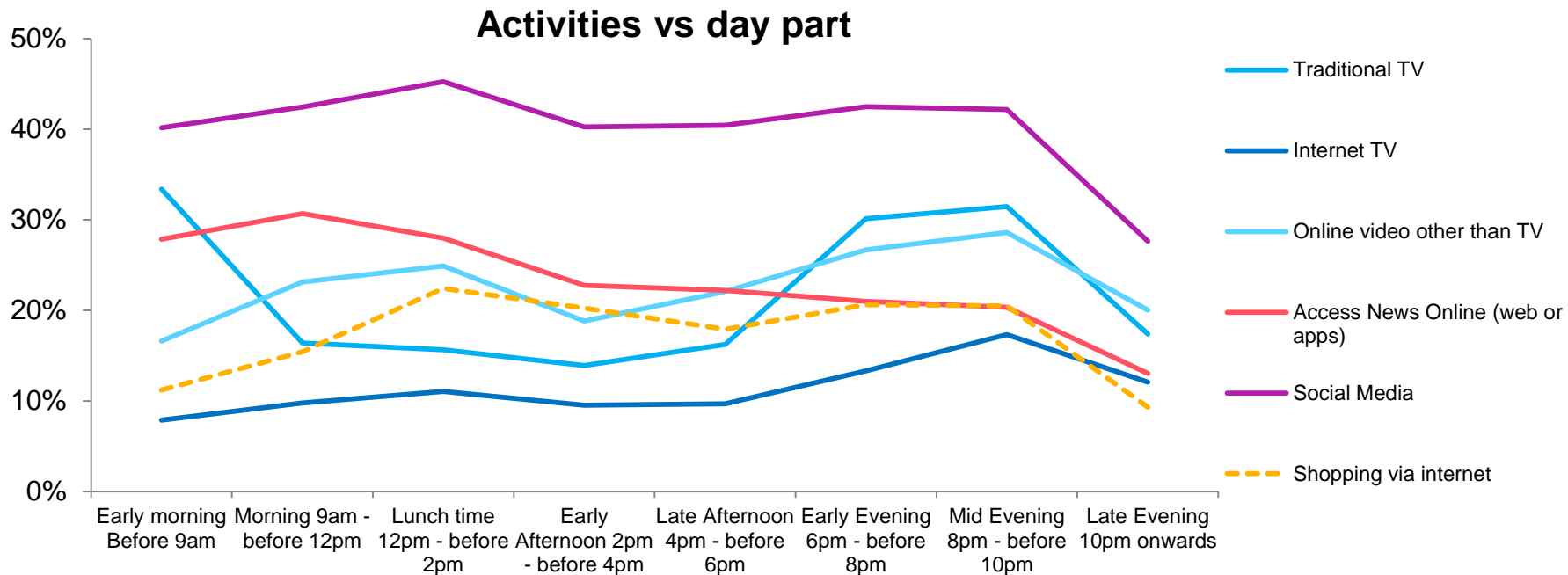
Source: Nielsen Cross Platform report 2015 and 2017

THANKS TO MOBILITY, SMARTPHONES ARE USED OFTEN ALL DAY



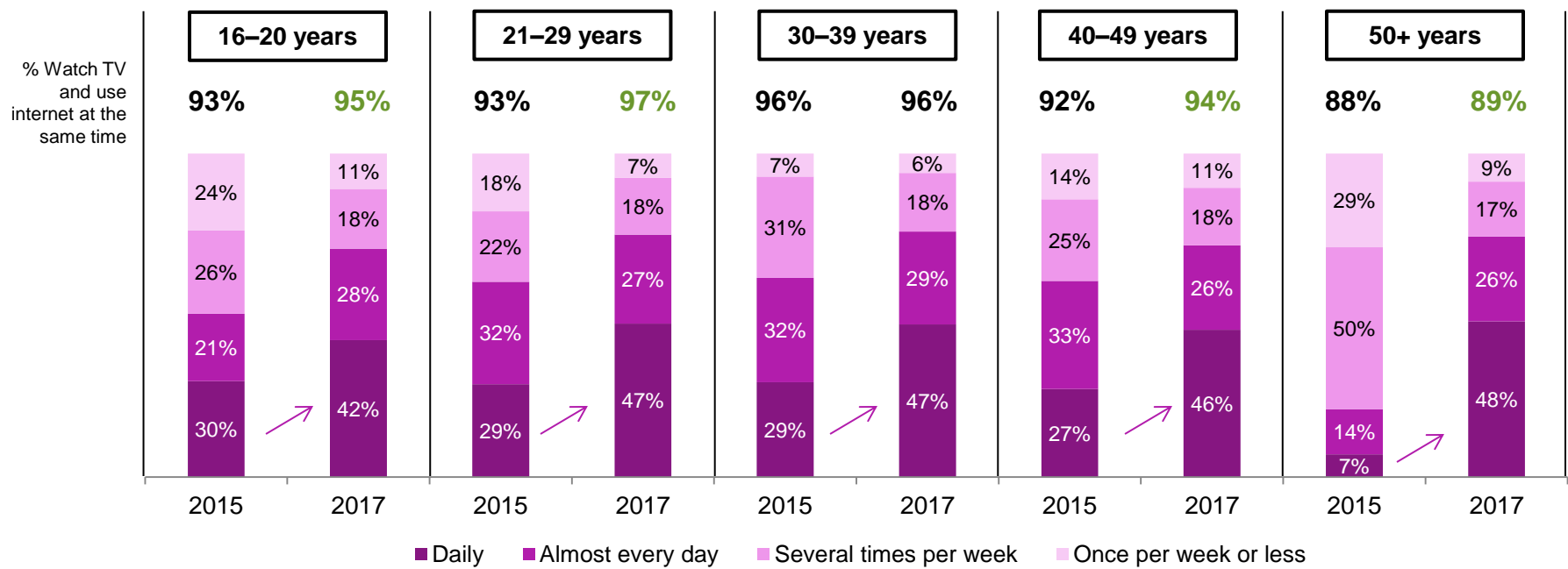
THERE ARE NOW TWO PRIME TIME PEAKS

Soc-Med is high throughout the day, Online Video prime-time is similar to Traditional TV



DUAL SCREEN: TV AND INTERNET

Dual screening is a DAILY activity of all age groups

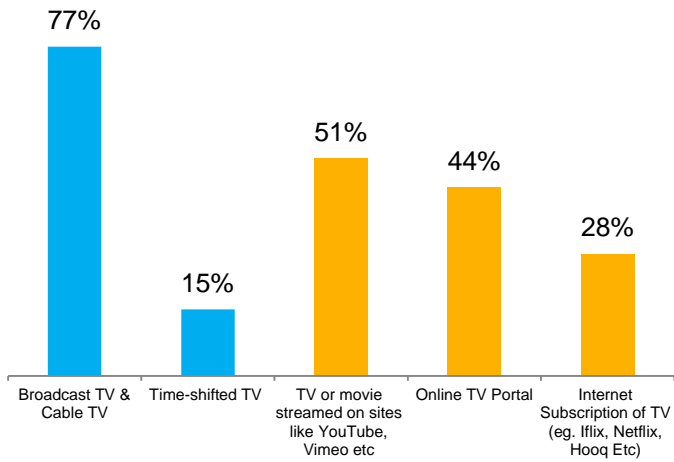


Source: Nielsen Cross Platform report 2015 & 2017

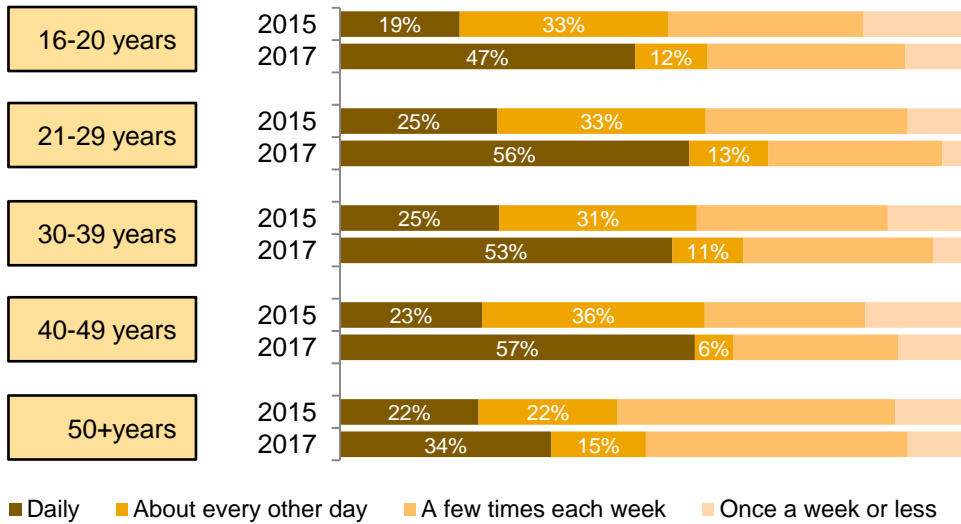
VIDEO CONTENT IS CONSUMED DAILY

TV and video content are accessed through many platforms, and daily access is increasing

Through many platforms of accessing TV/movie, which ones do you use?

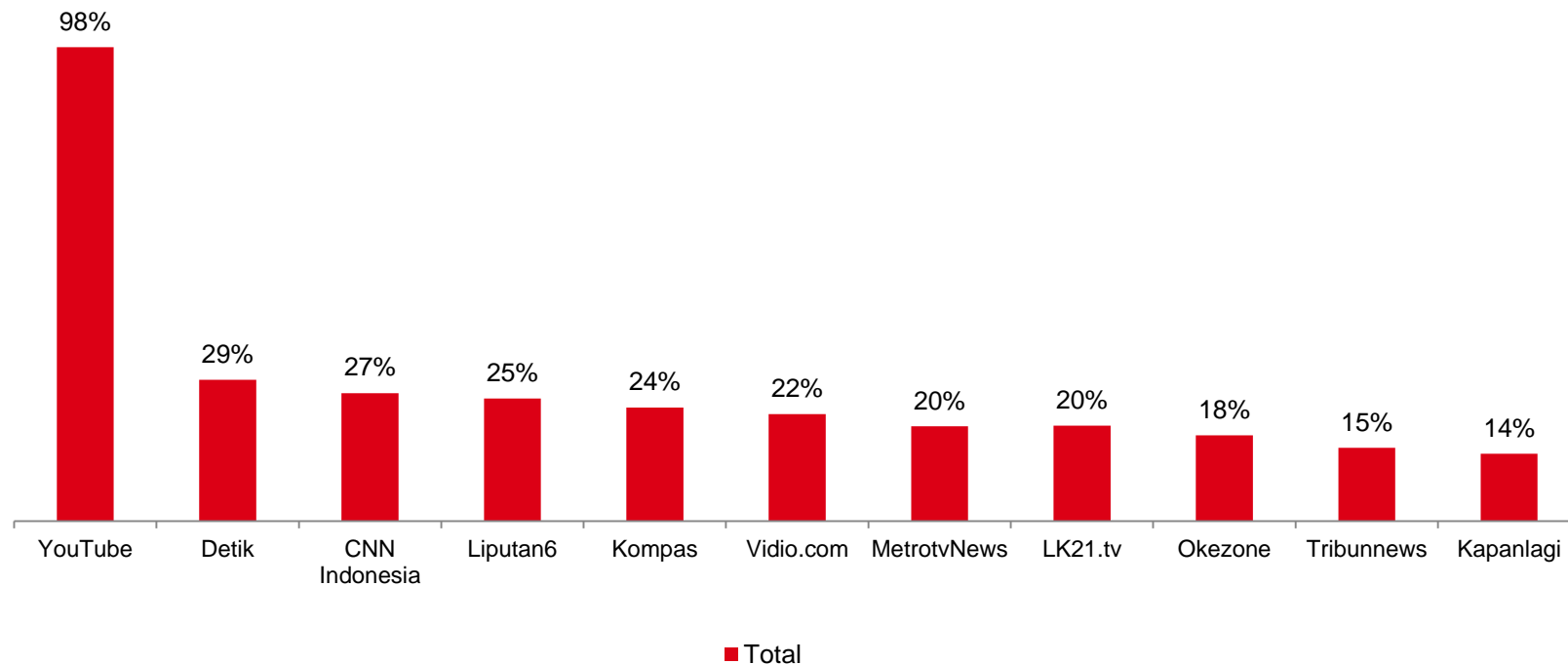


Frequency of watching from internet



WHICH SITES/APPS DO THEY WATCH ONLINE VIDEOS?

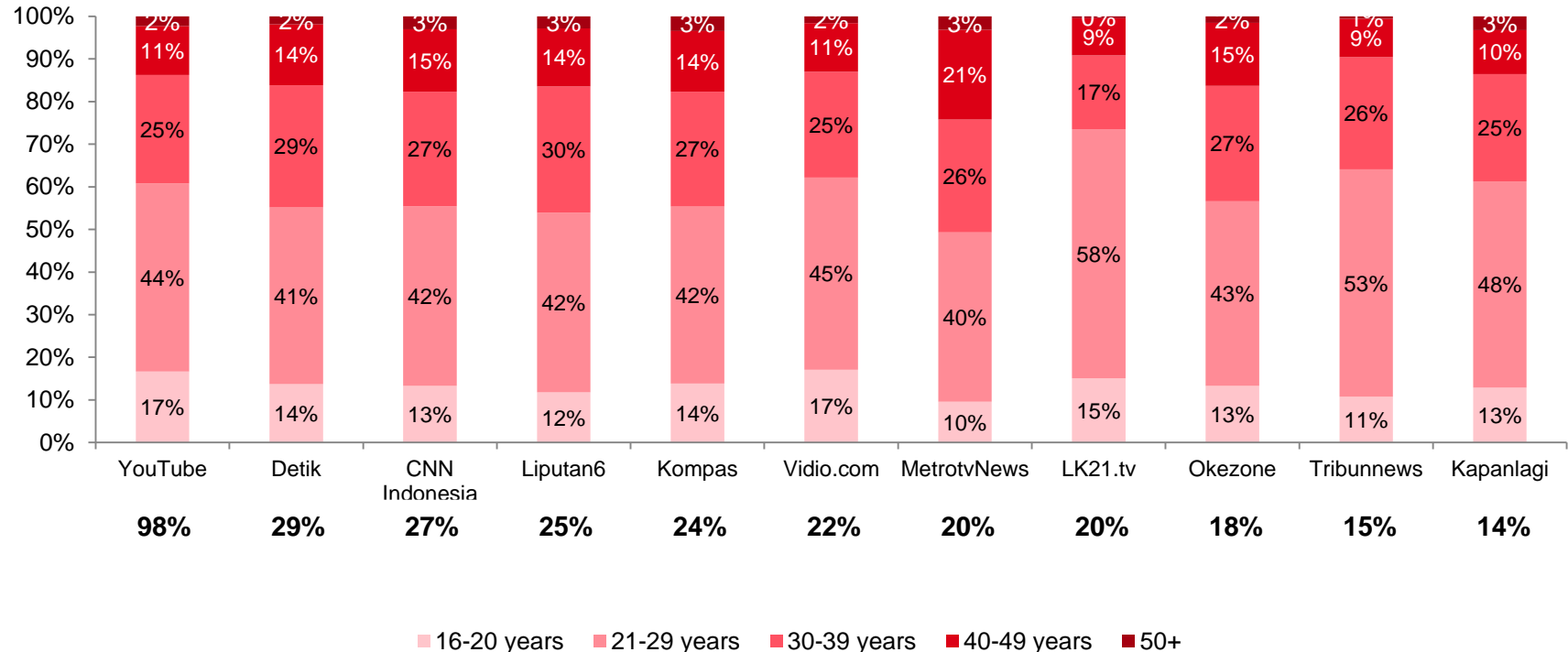
YouTube is still the most accessed online video platform



Source: Nielsen Cross Platform report 2017

WHICH SITES/APPS DO THEY WATCH ONLINE VIDEOS?

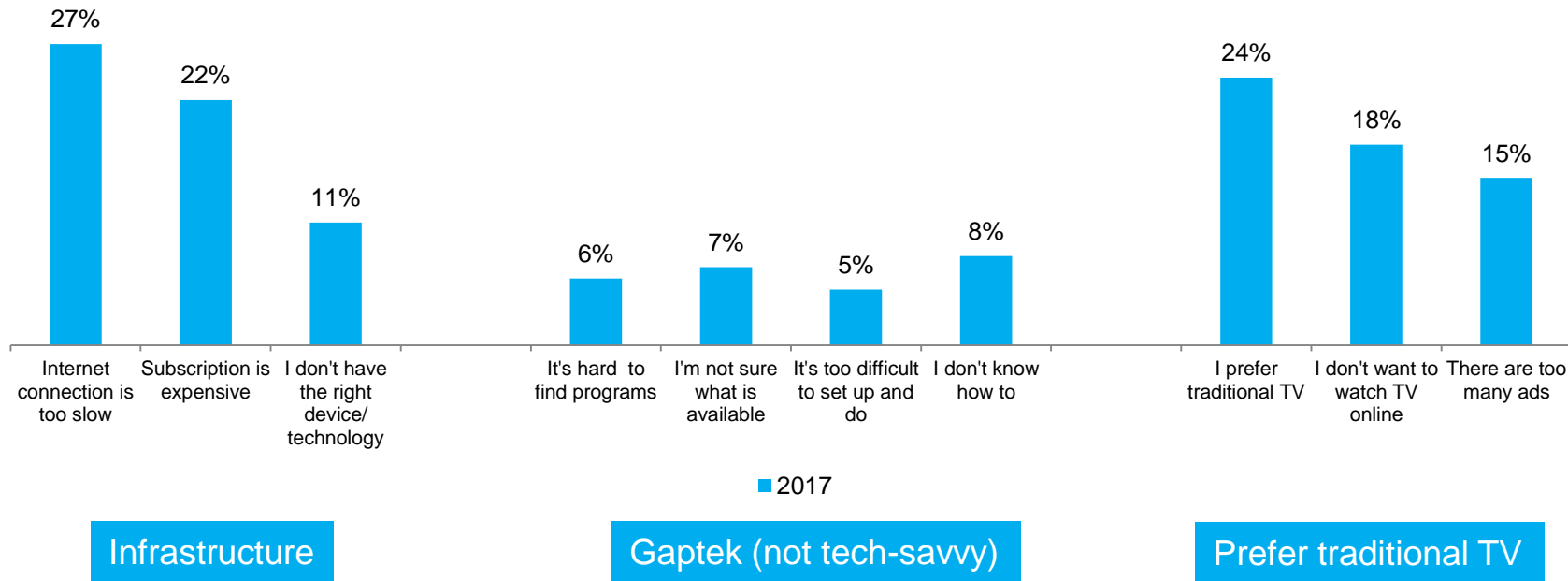
Some video portal are more skewed to younger audience



Source: Nielsen Cross Platform report 2017

WHY DON'T PEOPLE WATCH ONLINE?

Infrastructure impacts the ability to watch online, and quite a lot of Netizens prefer to watch traditional TV



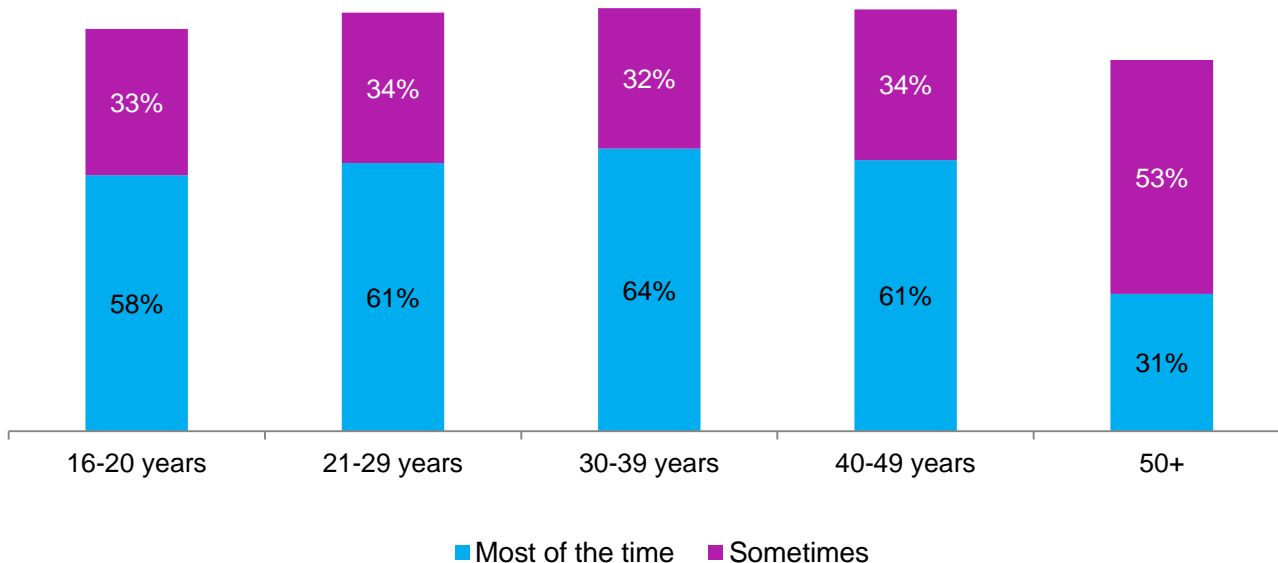
nielsen

Is Online Ad effective?

ONLINE VIDEO ADS DRIVE PEOPLE TO FIND OUT MORE

Consumers across all age groups have conducted online search after seeing online video Ad

Q: How often do you conducted an online search after seeing an online video ad?

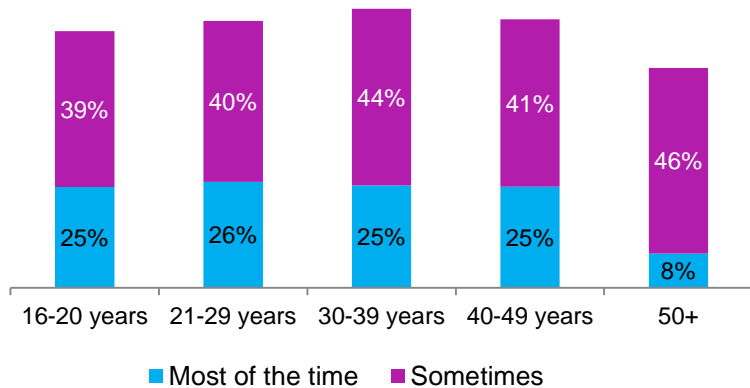


Source: Nielsen Cross Platform report 2017

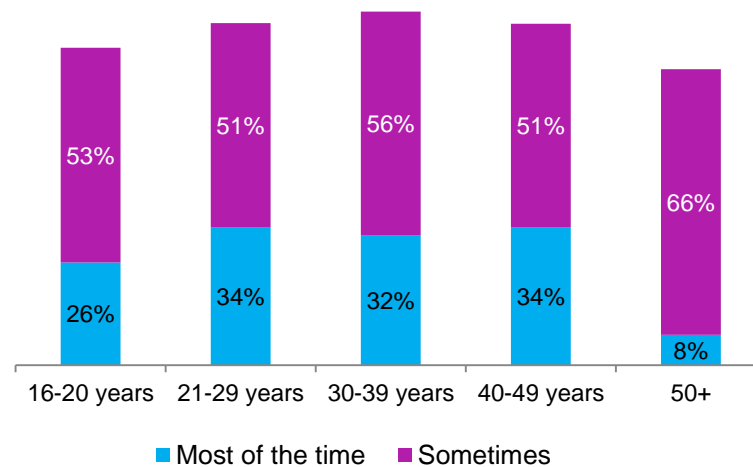
HOW OFTEN HAVE YOU TAKEN ACTION AFTER SEEING ONLINE VIDEO AD?

More than 30% of consumers across age groups make online purchase, except 50+

Contacted the company (call,e-mail,etc)



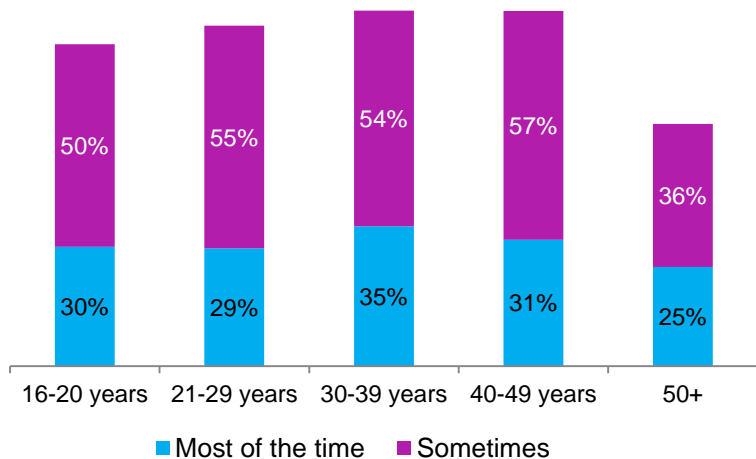
Purchased online



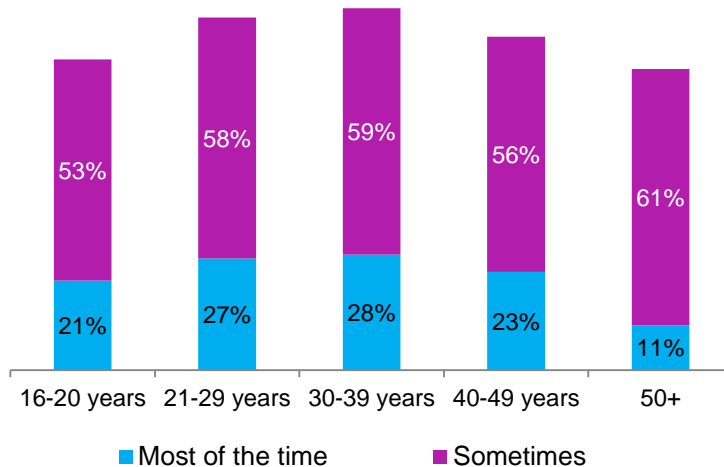
HOW OFTEN HAVE YOU TAKEN ACTION AFTER SEEING ONLINE VIDEO AD?

High possibility of purchase, once consumers visit the store

Visited the store in person



Purchased in person



What are the TRENDS?

Highest access at home, Access on public places are increasing

They consume content across multiple devices, often at the same time

Daily content consumption from internet is increasing across all age group

Most accessed local online video platform mostly comes from news sites / apps

Infrastructure plays big part in a consumers ability to watch online

Digital advertising prompts action – consumers seek further information!

The background of the image is a vibrant blue with a 3D, wavy, undulating texture that resembles water or a soft fabric. The waves are layered, creating a sense of depth and movement. In the center, the word "nielsen" is written in a clean, white, lowercase serif font. Below the letters, there is a horizontal line of eight white dots, each centered under a letter, which is a characteristic element of the Nielsen brand identity.

nielsen