

IPSOS MARKETING SUMMIT 2024



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Indonesia 2024 and beyond

Indonesia's projected growth is much better than other advanced economies



Current & projected GDP growth (%)

INDONESIA IS THE 5TH BIGGEST CONTRIBUTOR TO WORLD ECONOMIC GROWTH



COUNTRIES WITH GDP OF MORE
THAN USD 1 TRILION
TRILION DOLLAR CLUB

Indonesia is charting its course to be top 5 by 2045

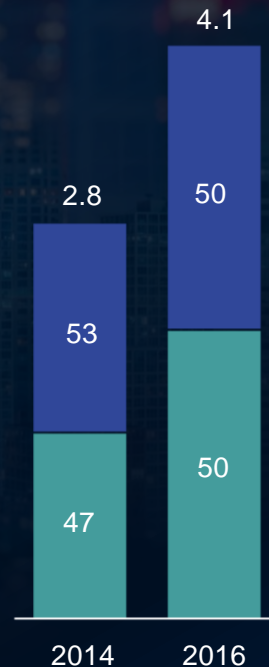


Digital adoption has become a significant aspect of our lives, especially Asia

Source: McKinsey – The Future of Asia Report

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Internet users around the world, %, billion individuals



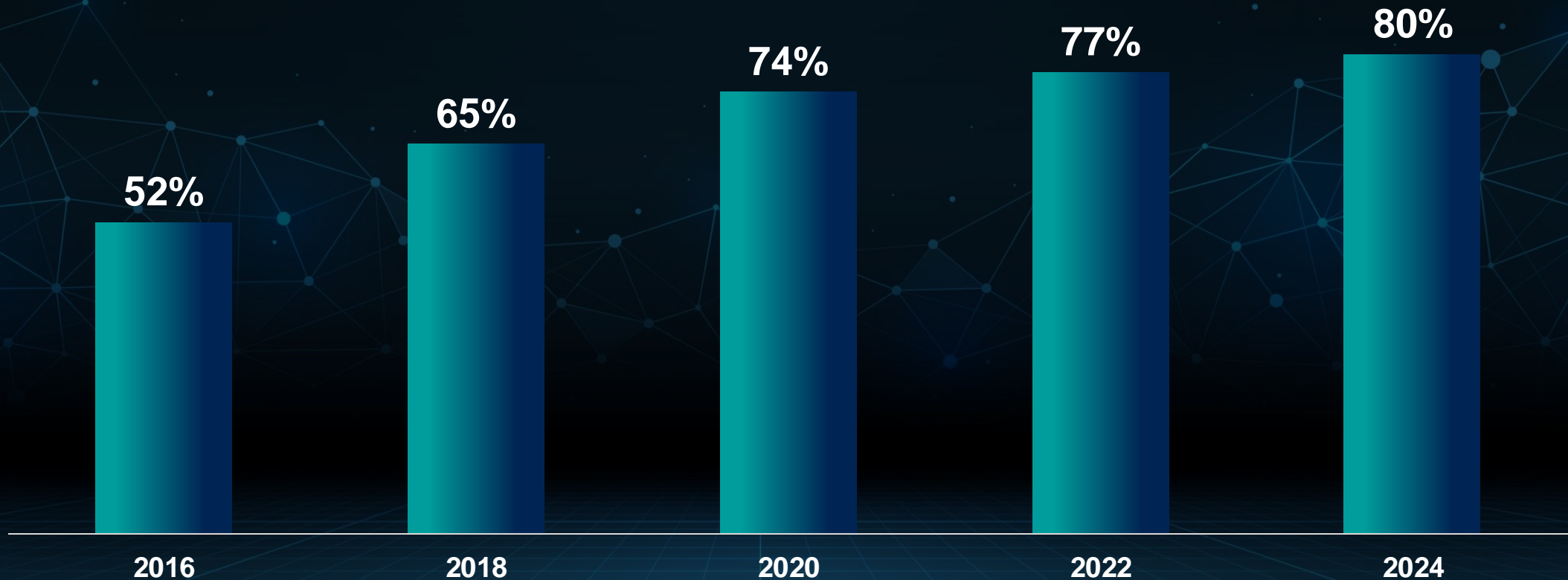
Asia's share of global growth from 2014–19 was **58%**

Top 10 economies by share of internet users making purchases via mobile phone in 2019, %



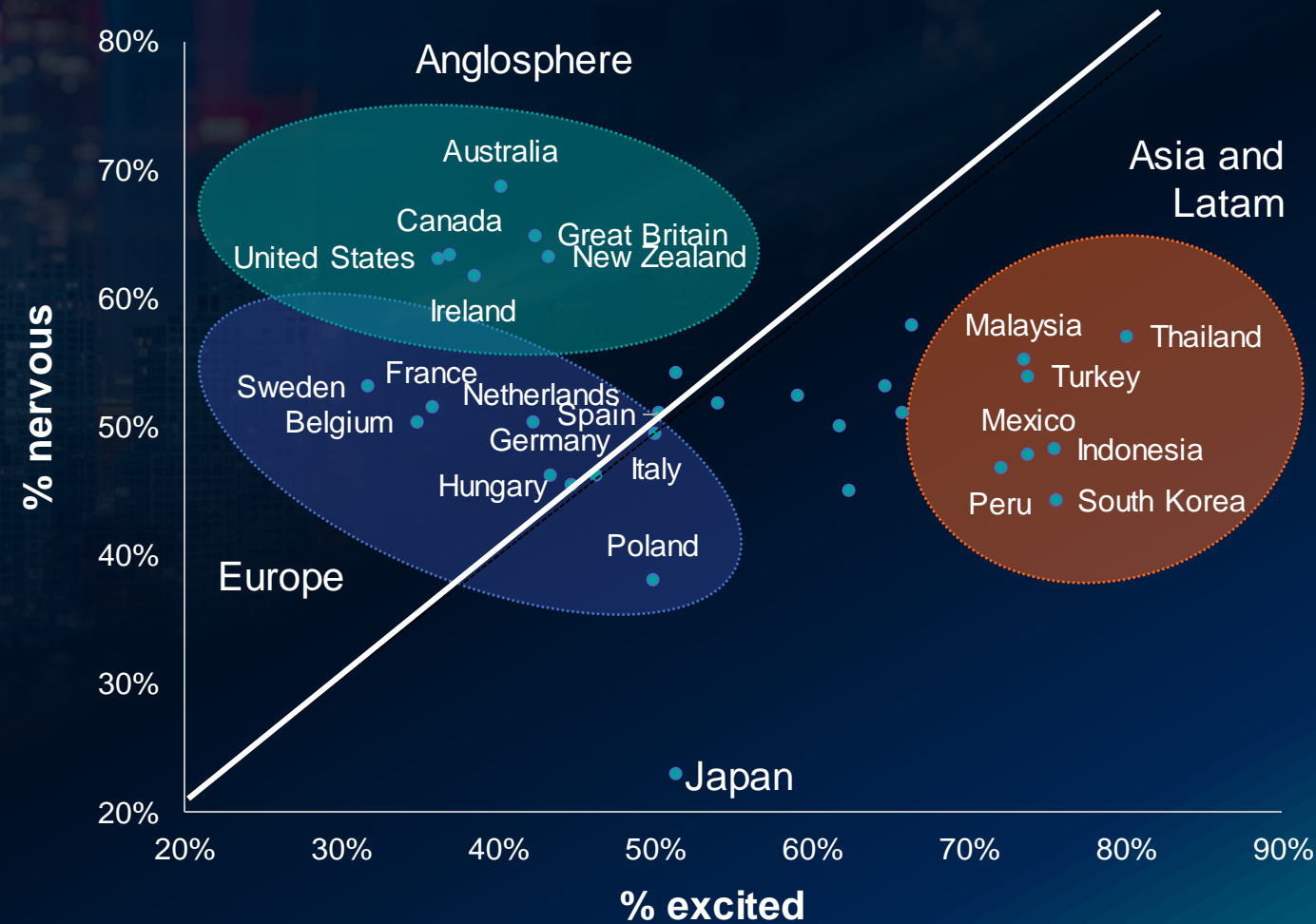
Indonesia records impressive digital adoption and usage

Indonesia Internet Penetration Rate



Indonesia is embracing the integration of AI technologies

75% expressing excitement, versus approx. 50% indicating a level of nervousness.



Indonesia is changing



Changing population

28% Gen Z as drivers of economy in the coming years vs 26% in 2020

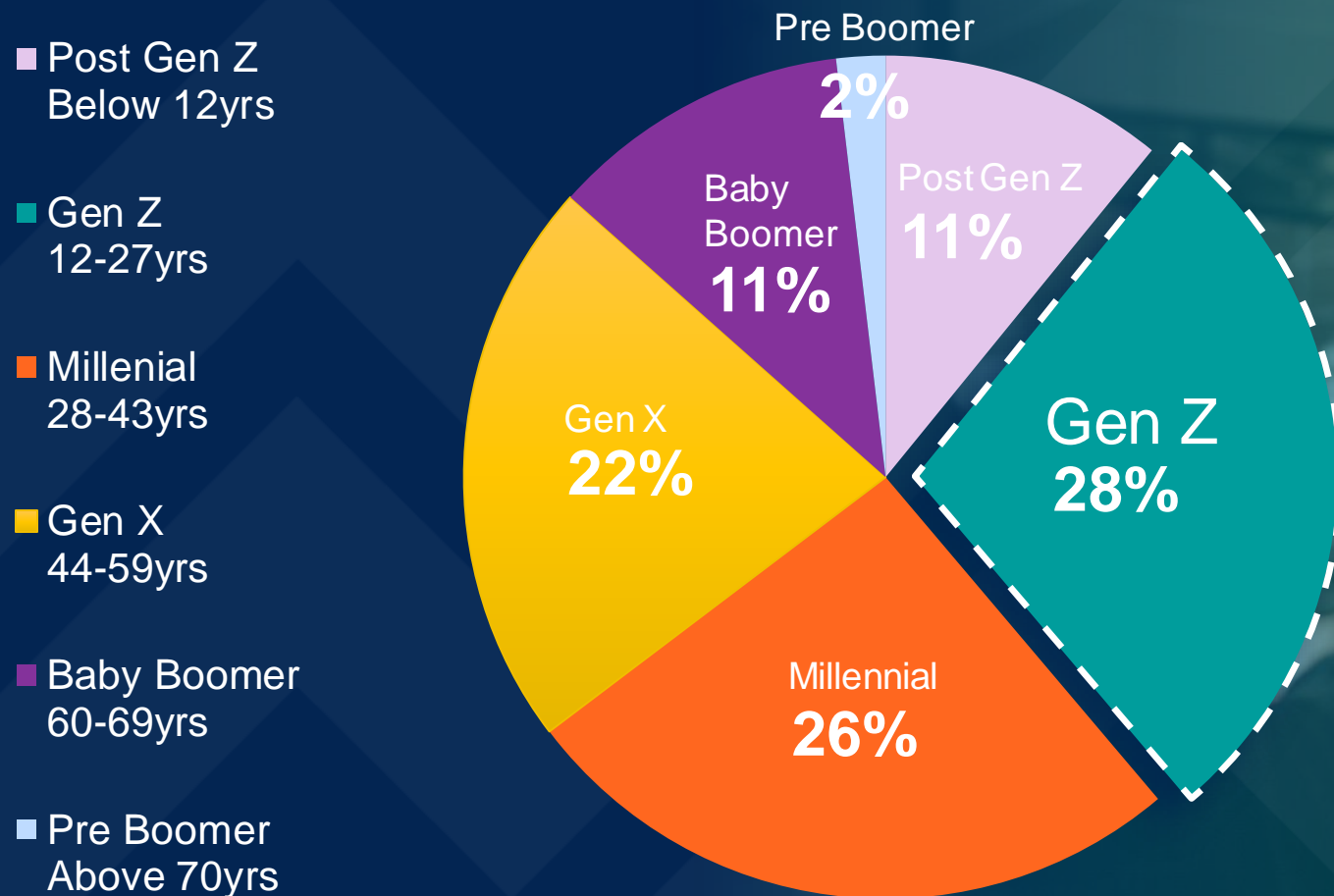


Increasing use of technology and digital transformation



Changing purchasing decisions

GEN Z: POWERING INDONESIA'S ECONOMIC FUTURE



43% of Indonesia Gen Z has embraced AI daily

12,9 million Indonesian Gen Z is familiar with AI

The key questions to address:



**How will
consumer
behaviour
change?**



**Who do you
target?**



**How do you
continue
growth?**



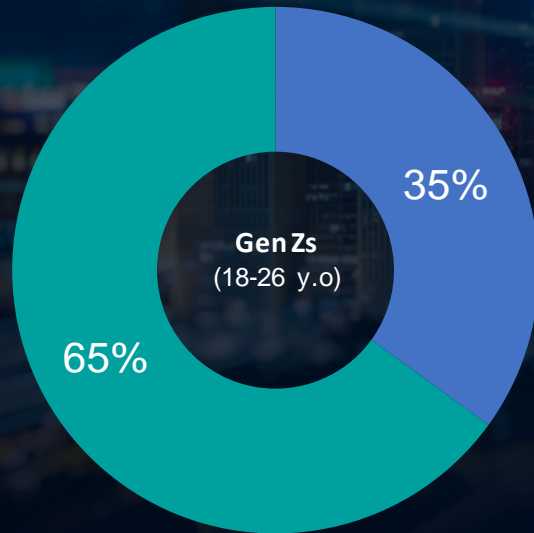
**What is your
value
proposition?**

HOW CAN WE LEVERAGE THIS POTENTIAL?



Gen Z still trusts humans, outshining automation for problem-solving

If you need to contact customer service, which method do you prefer?



■ By manual method, served directly by a human

■ With an automatic system, served by a computer program

80% of Gen Zs

"The reason Gen Zs prefer to be served directly by a human is that they give more accurate solution"

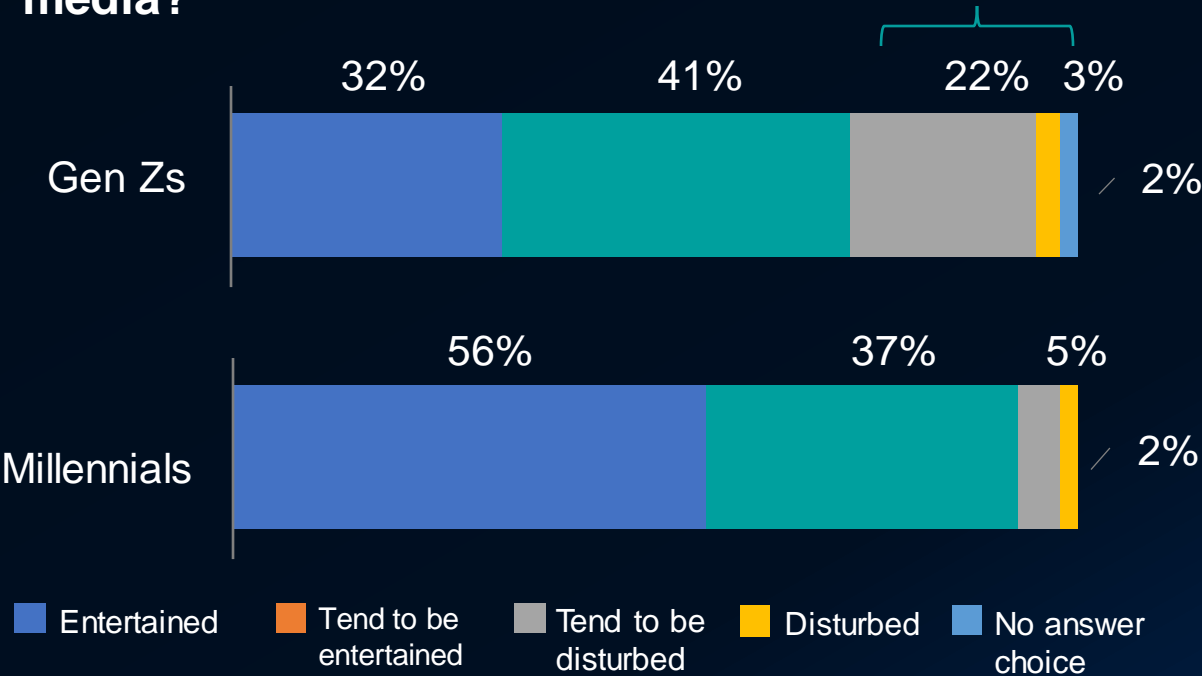
12% of Gen Zs

are confused by the automated guidance."

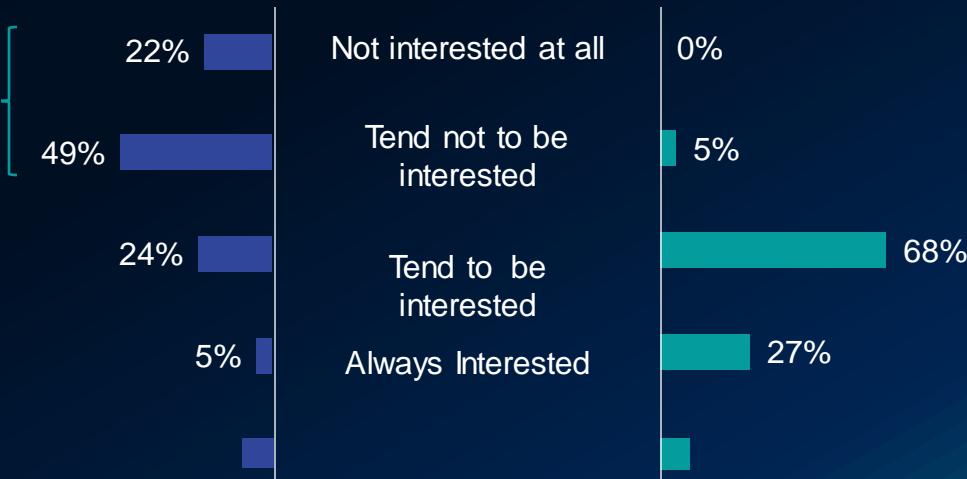
Success hinges on delivering genuine and relatable experiences to Gen Z

Generally, Gen Zs have lower interest on ads, with around 22% feeling uncomfortable seeing advertisements on their social media platforms

What do you feel when you see ads on your social media?



Gen Zs are indeed less interested in watching ads



Ads must reflect a resonating personal interest or value to gain attention

44% of Gen Zs and Millennials tune out ads from unfamiliar brands, while 35% of Gen Zs are less interested in ads that do not resonate with their needs/values.

What usually makes you less interested in watching ad in your social media?



Brands must be omnipresent and relevant across all touchpoints to connect effectively with Gen Z



Beyond transactional convenience, Gen Z expects seamless, memorable experiences throughout their purchase journey



Instant gratification is a key driver for Gen Z, who expect efficient solutions and personalized experiences in their fast-paced lifestyle



Brands that prioritize personalization and empowerment through customization can foster deeper connections and loyalty with Gen Z consumers

What Is The Path Ahead?



Gen Z will steer the trajectory of Indonesia's economic development, commercial activity and innovation

Understanding gen Z has become more important than ever



Striking a balance between digital automation and personalized, human-centric experiences is essential

Brands that can evoke affective experience for Gen Z in digital realm will be favored



Incorporating AI-driven humanizing experiences is key to enhancing this balance

Humanized experience hinges on delivering genuine and relatable experiences to consumers

THANK YOU.

