

INDONESIA 2020 NOW OR NEVER



IPSOS
FLAIR COLLECTION

GAME CHANGERS



IPSOS FLAIR: Understand to Foresee

After the success of our first Ipsos Flair in Indonesia, made possible thanks to the great reception of our clients and the commitment of our teams, we are pleased to present the second edition, which coincides with the 70th Anniversary of the recognition of Indonesia as an independent state by the Netherlands on 27 December 1949.

Ipsos has been in Indonesia since 2008, where there are 130+ full-time employees. Ipsos conducts qualitative and quantitative research among the general public and specific targets such as businesses, professionals or farmers.

Launched in 2005, Ipsos Flair is an international publication that analyses the values and attitudes of consumers and citizens in relation to how they view all actors of society; brands, advertising, businesses, media and politicians, to be able to recommend the best strategies. Flair is also currently developed in Brazil, China, Colombia, South Korea, France, India, Italy, Mexico, Peru, Russia and Thailand.

Flair is about instinct and intuition, the ability to capture the atmosphere of a country, to perceive the right direction to move in and know when to act. It is also another way of looking, understanding the results of surveys as sociological symptoms to understand the real relationship between people and everything around them.

Against stereotypes, Flair affirms Ipsos' intellectual leadership, freedom of spirit and competence of its experts through:

- Analysis of motivations and expectations of consumer-citizens

(perceptions, confidence, frustrations...)

- Exploring key topics (ageing, emancipation of women, environment, purchasing power, new attitudes, the impact of digital...)
- A selection of successes and examples for strategists.

By bringing together diverse and complementary perspectives, the Ipsos Flair series helps our clients to formulate and to fine tune strategic planning approaches.

As President Jokowi has been re-elected after a suspenseful recount, the country is continuing to catch up and to develop: it has more appeal than ever for investment and growth thanks to the amazing enthusiasm of Indonesian nation.

Enjoy your reading!

Henri Wallard
Deputy CEO

EDITORIAL



By Yves Bardon,
*Ipsos Flair Programme Director -
Ipsos Knowledge Centre*

Indonesia has been in the news this year mostly for tragic reasons. Natural disasters such as tsunamis, floods, volcanic eruptions, and earthquakes... Technical disasters with the Boeing 737 MAX (Lion Air) crash or the collapse of a mine... In all cases, these disasters make us forget other realities, which are positive, encouraging and stimulating.

As we wrote in our first edition of Flair, it is a kind of fatality for Indonesia to be known for tragic events or, paradoxically, to be famous for magnificent landscapes; a paradise to get married in. But we cannot reduce a country of 268 million people to two stereotypes: tragedy or glamour.

Some figures give another dimension to Indonesia.

Demography: The population increased by 1.1% in 2018, which is above regional average, to a total of 266,794,980, making Indonesia the country with the 4th largest total population in the world.

Economy: Real GDP is forecast to increase by 5.3% per annum between 2018 and 2023. Inflation decreased from 2017 to 2018 (from 3.8% to 3.4%) and Central Bank interest rates rose.

Figure 1: The new subway in Jakarta



Infrastructure: The Jakarta underground was inaugurated at the end of March, a skytrain is nearing completion, new bus lines are created to relieve congestion in the capital city. While other countries are spending the bulk of their investments on their capital, Indonesia is lifting the main eight cities at the same time: Surabaya, Medan, Bandung, Bekasi, Tangerang, Makassar & Depok, and of course Papua. The airport built near Lake Toba is another example of this development.

Employment: The unemployment rate is steadily declining, standing at around 5.6% in 2016, compared to more than 7% in 2010. And it is expected to fall further, to approximately 5% at the end of 2019.

Services: It accounted for 43.6% of GDP in 2017. With US\$12.5 billion, travel services accounted for 52% of total services export in 2017. The transaction value in the FinTech market amounts to US\$27,776.4m in 2019.

Technology: In Indonesia, 66 million people (the equivalent of the population of Thailand or France) have Internet access while, in 2018, 45% used the Internet and there were 73.6 mobile cellular subscriptions per 100 people.

New business: e-Commerce revenues are expected to have a positive annual average growth of 9.3% before 2023. e-Travel generates the highest digital revenues, with US \$16 million, a share of 50.6%.

Tourism: After 11.5 million tourists visited Indonesia in 2016 and 14 million in 2017, a total of almost 16 million came to the country in 2018 (+12.5% from 2017). The month of December, of the peak of the tourist season, recorded 1.4 million visitors (+22% compared to the previous year). Indonesia is now the ranked first as the world's halal tourist destination, along with the long-unbeatable Malaysia (Global Muslim Travel Index).

Whether we look at economic or trade statistics, Indonesia is now facing a choice that will determine its weight in the region, or even in the world. Either catch up (already a huge challenge, given the regional disparities, social fractures, poverty of part of the population), or give a boost that surprises and gives Indonesia a very proactive image.

Let's look at three examples: sport, business and sustainability.

1. **Sport:** The 18th Asian Games ("Pesta Olahraga Asia 2018") was held in Indonesia, in Jakarta and Palembang, from 18 August to 2 September 2018 with the participation of 11,720 athletes, the second largest

multi-sport event after the Olympic Games. This provided Indonesians with a very flattering picture of their country, its ability to organize grandiose events and to be recognized as a real power. Their traditional humility may have been jostled, in the positive sense of the word.

2. **Business:** The very fast growth of e-Commerce provides all products in one place, from fashion to electronics, toys, household needs and furniture. Many people now prefer to shop online rather than offline, simultaneously enjoying discounts and bonuses on their purchases. The hours that would be spent in the heat and in traffic jams does not make going out to shop a desirable prospect. The closure of shopping malls, unthinkable a few years ago, is becoming a reality that forces retail players to adapt and innovate even more quickly. In this race, inventiveness is in competition. Offline trade has the advantages of providing a fuller customer experience, including emotions in the purchasing process and the quality of the relationship with sales staff. No wonder mystery shopper studies are booming, especially in sectors like luxury. But the average players have a lot to do to engage their consumers.



- 3. Sustainability:** There is the idea that Jakarta can no longer be both a business centre and an administrative capital: to centralize everything in Jakarta would unbalance the country, would aggravate pollution, and overall have less positive economic and social consequences than imagined. This is not the first time the idea has been mentioned, but to actually act on keeping business activities in Jakarta and moving governmental and administrative activities to another city would be revolutionary. Whether for climatic, environmental or political reasons, changing capitals has a huge human, cultural and geographic impact. Of course, in Sumatra, no one would be happy to see the capital go to Kalimantan (the historic competition between the islands being one of the reasons), but the risk is too great: 95% of North Jakarta will be submerged in few years and 40% of Jakarta's surface will be below sea level. Other countries have taken the plunge: in 1999, Malaysia moved its capital from Kuala Lumpur to Putrajaya because of its incredible levels of pollution. In 1970, Belize changed capital to Belmopan because Belize City, the former capital, was devastated by a hurricane in 1961. In Japan, the former Kyoto capital moved to Tokyo in 1868 and in France, Versailles was the seat of the Kingdom from 1683 to 1789.

These points show that Indonesia can be an innovative and disruptive country. But, in terms of perception, the gap between the Indonesian reality and the foreigner's image of the country is still important. This thinking is echoed in the title of our new edition, which is a fitting phrase for Indonesia at this time: « **Now or never** »: to be perceived as a regional leader, or not.

« Now », because the signs of Indonesia gaining recognition and crystallising a new image are on the table.

- **In economic and social terms:** the establishment of an economic dynamic which helps create of a real middle class with more purchasing power, which in turn implies a social model in which there is less social exclusion and greater gender equality.

- **In terms of land settlement:** the construction of highways and transportation systems linking cities and opening up regions, diminishing disparities between rural and urban areas, and reaching a balance in terms of incomes and lifestyle.

- **In terms of architecture:** the development of cities, building spectacular urban centres - amazing condominiums and skyscrapers, more and more high-end residential areas. All in all, innovation of high environmental quality.

- **In terms of marketing and business:** the proliferation of brands, advertising, communications and media. Also, more shopping malls and luxury shops, being more widely spread are stimulating the desire to purchase in different locations.

- **In terms of the environment:** as per the signature of the COP 21 agreement and actions to address the pollution problem. The recorded air quality in Jakarta today is worse than notoriously polluted cities such as Delhi and Beijing. Because of this a group of environmental activists in Jakarta sued the Indonesian government without hesitation. Sending containers filled with plastic waste to Europe for recycling is in violation of the import rules (according to the customs of the island of Batam). This is another signal of the link between ecology and geopolitics.

« Never », if perceptions persists despite the reality, meaning that Indonesia continues to be seen as a modest country and people.

Of course, « Never Say Never Again » , because the situation is not so tense or urgent. Indonesia is moving at its own pace; but if the world's fourth largest population is to reveal its full potential and be recognised as a fully powerful country, it is necessary to move up a gear.

It is the purpose of our second edition of Flair Indonesia. Even remembering the quote “tong kosong nyaring bunyinya” or “empty barrel makes a lot noise”, Indonesians have too much to offer to stay silent much longer and must fill the barrel! This is the best way to change the game.

Yves Bardon

Ipsos Flair Program Director – Ipsos Knowledge Centre

THE SPRIT OF CONQUEST

The view of Soeprapto Tan, Country Manager of Indonesia



By **Soeprapto Tan**,
Managing Director Ipsos Indonesia

The title of the first edition of Ipsos Flair in Indonesia in 2018, “Dealing with the opposites”, reflected the situation expressed in the last presidential election. Different visions of the model of society have been in competition with the “Moderns” vs. the “Traditionalists”, but now everyone is on the same page when it comes to further development, the attractiveness of the country and the search for financial capabilities. These are the pillars for the growth of digital infrastructures and players, Internet capacities, connectivity, and hardware infrastructures.

Indonesia has tremendous competitive advantages in the ASEAN. Workers’ salaries are not too high, automated jobs are expanding, big companies are investing in Indonesia (L’Oréal engaged one thousand employees, Coca Cola opened a distribution centre, Chinese carmakers are investing) and it is easy for people to create their own business or start up small companies.

The growth of Telco’s players is very fast, embodied by the likes of Samsung, Opo, Vivo and Xiaomi. Because consumers are associating these players with value for money, this is quite encouraging for Chinese brands.

The demand largely comes from Millennials. Travel and tourism, as well as

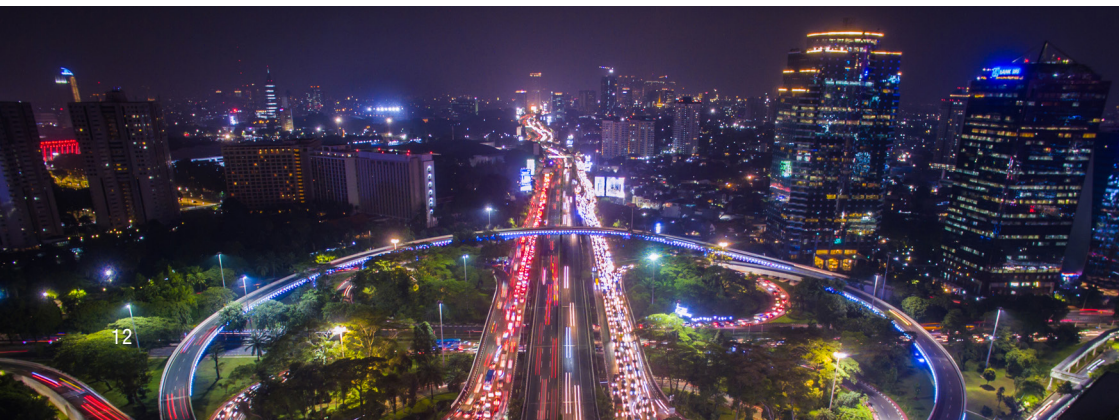
property development, are booming thanks to this population who “want it all”: to buy an apartment, to have children, to visit the world, to enjoy online and e-Commerce purchases (which are dominating the traditional channels).

We note moves in terms of values and behaviours. Family is changing, for instance; having a big family is a thing of the past, now the number of children that people are having is getting smaller and smaller. Other matters take priority; recognition, status, the rise of individual.

Connectivity, whether in the sense of transportation or digital, is a key-word and the big trend, as part of e-Commerce 4.0, which challenges the traditional economy and the consumers themselves with its counterpart: growing worry around privacy and personal data.

As we see it, things have moved quickly. “Now or never” also expresses this tension, the impulse to move forward resolutely or to take more time. All these changes can be worrying or exciting, having the effect of making you want to either cling on to the traditional system or enter the modern world.

They reflect a key moment in Indonesia’s history and its transition to developed country status. This is a fantastic opportunity for Ipsos clients: surfing on the optimism of a large part of the population, a steadily growing income level, and a new and encouraging spirit of conquest.



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**“THE FIRE IS BURNING,
THE SUN IS MORE
BURNING,
BUT NEITHER IS AS HOT
AS THE HEART OF A MAN”**

INDONESIAN PROVERB



USER GUIDE

CATCHING UP



By Dewi Sakuntala

Human Resources

In recent years, infrastructure development has progressively enabled Indonesia to improve its logistics performance and economic activities and to create employment. An investment of 29.6 billion USD in 2019 makes this possible.

By the end of 2019, almost 1,800 kilometres of motorways should be built, beading to the 27 new seaports and 7 new airports already constructed since 2015. Not to mention the development of irrigation networks for 134,000 hectares of rice paddies or the construction of 7,500 hectares of subsidized housing.

Having efficient infrastructure is crucial for Indonesia to be able to position itself as the central country between the Pacific and the Indian Ocean and essential in the Indo-Pacific axis developed by the United States, Australia and India.

In the latest IMD “World Competitiveness Rankings” report for 2019, the top 3 is composed of Singapore, Hong Kong and the United States. In 32nd position, Indonesia has moved up 11 places since 2018, and is now between France and the Czech Republic. Well-performing infrastructure helps a country to be perceived as competitive and appealing for investors, and Indonesia is facing this challenge.

This development has two implications: to connect and to improve, linking cities together and improving the services and the daily life of Indonesians in a context

where 55% of Indonesia's total population lived in urban areas in 2017, compared to 48% in 2007.

It should be noted that infrastructure spending in Indonesia accounts for about 2.5% of GDP, while other countries in the region spend more, such as Malaysia (11.3% of GDP) or Thailand (6.3% of GDP).

Despite this, infrastructure development is occurring as quickly as possible, whether in Central Java, in Papua or near Lake Toba - with its new airport.

Infrastructure is also key to lifting the level of the education system to meet companies' and government's expectations. From a human resources point of view, it is not easy to find suitable people in sectors such as digital or technologies, especially at middle-management level. Fortunately, younger generations are attracted to new technologies and already have practical experience as consumers. To become a smart nation, like Singapore, we need to develop the education system and internships that encourage digital and technology savviness. The government is already allocating a significant portion of the national budget for training and development of all employees in government institutions. This will be decisive for the country as it prepares for the development of Industry 4.0.

Today, activities must be geared towards the fourth industrial revolution, which is underway. The first took place with the fantastic innovation of the steam engine and machines at the beginning of the 19th century. The second with electricity, mass production and international transport at the end of the nineteenth century and into the twentieth century. Then the third industrial era from the 70s brought computers and robotics into society and business. The fourth is born from the fusion of machines and digital, and the involvement of the consumer as an actor in the production, instead of the passive customer at the end of the process.

READY FOR THE WORLD!



By Maulana Lazuardi

Customer Experience - Market Research

Long-term program and short-term players.

The stability of the country is a key element to make investors, especially from China and Taiwan, choose Indonesia over other countries in the region. The Masterplan for Acceleration and Expansion of Indonesia's Economic Development (MP3EI) is a major asset in this context. This ambitious program was launched by the Indonesian Government in 2011 with the aim that it would earn its place in the world of developed countries by 2025, with expected per capita income of USD \$14,250 - \$15,500 and total gross domestic product of USD \$4 - 4.5 trillion.

The vision for 2025 will be achieved by focusing on three main goals:

1. Increase value-adding and expanding the value chain for industrial production processes and increase the efficiency of the distribution network. In addition, increase the capability of the industry to access and utilize both natural and human resources. These increases can be attained through stimulating economic activity within regions as well as among regional centres of economic growth.
2. Encourage efficiency in production and improve marketing efforts to further integrate domestic markets to push for competitiveness and strengthen the national economy.

3. Strengthen the national innovation system in the areas of production process and marketing with a focus on developing a sustainable, global and competitive innovation-driven economy.

Including all the regions of the Indonesian archipelago in the program is one of the main challenges. The MP3EI balances development by making the most of the potential of each region, structured in six corridors (see below).

Figure 2: Regional corridors in Indonesia

Bali - Nusa Tenggara	Gateway for tourism and national food support
Java	Driver for national industry and service provision
Kalimantan	Centre for production and processing of national mining and energy reserves
Papua - Moluccas	Centre for development of food, fisheries, energy, and national mining
Sulawesi	Centre for production and processing of national agricultural, plantation, fishery, oil & gas, and mining
Sumatra	Centre for production and processing of natural resources and the nation's energy reserves

Other challenges relate to the employability of Indonesians in new economic sectors, the quality of training, regional disparities and the development of very large cities. Global warming and international climate agreements are also topics that do not facilitate the realization of the plan.

Development also involves the “little ones”. Five thousand start-up businesses were born in Indonesia in 2018; belonging to sectors including financial technologies transportation and the digital economy.

These sectors are the most active in improving the lives of consumers and providing an-swers to their needs: the example of GOJEK is often quoted. Launched in 2010 with the mission “to improve the livelihoods of local ojeks (motorcycle taxis)” the start-up is now regarded as Indonesia’s first “unicorn”.

It was able to invest \$500 million last year in its international expansion strategy, targeting Vietnam, Thailand, Singapore and the Philippines. In early February, GOJEK announced the completion of the first round of Series F funding led by Google, JD.com, and Tencent, with Mitsubishi Corporation and Provident Capital among other investors, which now values the company at \$5 billion.



ENVIRONMENTAL SENSITIVITY



By Dewi Sakuntala

Human Resources



Indonesia signed the Paris Agreement at the end of 2015 as part of the COP 21: *“The Paris Climate Conference led to a new international climate agreement, applicable to all countries, aiming to keep global warming below 2°C, in accordance with the recommendations of the Intergovernmental Panel on Climate Change (IPCC).*

Its purpose is to hold the increase in global average temperature to well below 2°C above pre-industrial levels and to ensure that efforts are pursued to limit the temperature increase to 1.5 °C.”

Following the Paris Climate Agreement, Indonesia is committed to reducing its greenhouse gas emissions by 29% and by 41% by 2030.

A few years later, enthusiasm seriously dwindled. The Climate Action Tracker notes that this year, with current environmental policies, the global temperature is expected to rise by 3.3°C above pre-industrial levels. Also alarming is that, after the withdrawal of the United States in 2017, Australia is renouncing to enact in law the climate objectives of the Paris Agreement.

Opinion is becoming increasingly sensitive to environmental concerns:

- Recurrent ecological disasters clearly show that things are getting out of hand.

- Brands speak in environmentally-friendly terms and encourage consumers to dispense with plastic bags, to recycle and to re-use. They create sustainable packaging or reduce the materials they use.
- The educational system places environmental problems in its school curricula and “science clubs” and associations have a “save the planet” discourse which is becoming more and more assertive.
- People are aware to bring their own bags whenever they go shopping for groceries instead of using plastics bags from the minimarket or supermarket. Some might do this because of new regulations from the government which requires shops to charge extra for plastic bags, but for the most part this practice reflects environmental sensitivity and goodwill which is increasing significantly over the past few years.

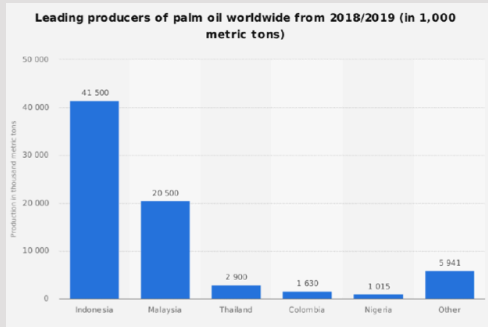
Environmental sensitivity and goodwill have economic, social and political stakes. Palm oil is the perfect example of a highly sensitive subject in this context, as it is an essential product in the country’s consumption. Indonesia and Malaysia were the leading exporters of palm oil worldwide in 2018/19 (see figures 4/5).

Indonesia has launched a campaign to avoid burning shrubs or forests during clearing operations to open new oil palm plantations. However, the European Union classified palm oil as a risky crop that releases more unintentional emissions from carbon, causes significant deforestation and rules that its use in renewable fuel should stop by 2030.

Figure 3: Palm oil consumption in Indonesia 2011/2012 - 2018/2019 (in 1,000 metric tonnes)



Figure 4: Leading producers of palm oil worldwide from 2018/2019 in 1000 Metric tons



This instruction, challenged by the Indonesian government, would have a huge impact on the life and resources of small and family farmers producing the palm oil and would increase the gap between agricultural regions and urban areas, an effect that works in exactly the opposite direction to the intentions of the infrastructure development project.

The tension is such that the government has threatened to leave the Paris Agreement, following in the footsteps of the United States, Australia and Brazil. Although there are no definitive signs in this direction, the cost of abandoning the Paris Agreement must be examined in a context of a stronger competition between European sunflower and rapeseed oils and Indonesian palm oil.



SMART CITIES OR SUSTAINABLE CITIES?

Continuing the environmental discussion, the development of cities and infrastructure reflects two visions of development.

In Europe, the authorities prefer to talk about a “sustainable city” with four interactive pillars: resilience to climate change, the economy of natural resources, the “smart” innovation of technologies and services, and inclusiveness through consultation and participation of inhabitants at all stages of the project.

In Asia, it is more about the “smart” facet, at the expense of considering the natural risks or climatic disturbances. The inhabitants are also rarely involved in the process. In South Korea or China, many cities have been created from scratch but do not attract investors or residents, such as Songdo, whose nickname, “the Big Data Lab”, shows that the other dimensions of the project (social, sustainable, ecological...) are not perceived, especially because the city was built on dried marshes and is provided by a thermal power station, not in line with an “environmentally-friendly” view. This first South Korean “smart city” has not experienced the hoped-for success and attracts mostly wealthy families, seduced by the quality of services.

The development of the MRT (Moda Raya Terpadu - integrated wide mode [of transport]) in Jakarta, the desire to use new modes of transport to connect cities, the integration of mobility sector’s players and the design and implementation of new platforms are all challenges that are interesting to follow to get an idea of which model Indonesia will follow.



DIGITAL INDONESIA



By Bipradeep Chakraborty
Brand Health Tracking



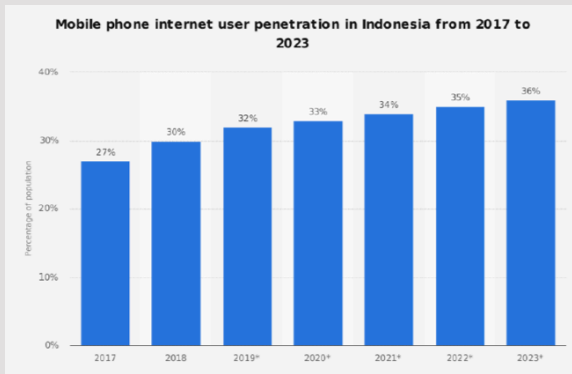
By Alok Tiwari
Innovation

The development of infrastructure is bringing more and more of Indonesia's 268 million inhabitants online.

Population	268 million
Mobile subscriptions	365 million
Internet users	150 million
Social media users	150 million
Mobile social users	130 million

In 2017, the proportion of the population accessing the Internet from their mobile phone was 27%, and this figure is expected to reach 36% in 2021.

Figure 5: Mobile phone internet user penetration in Indonesia

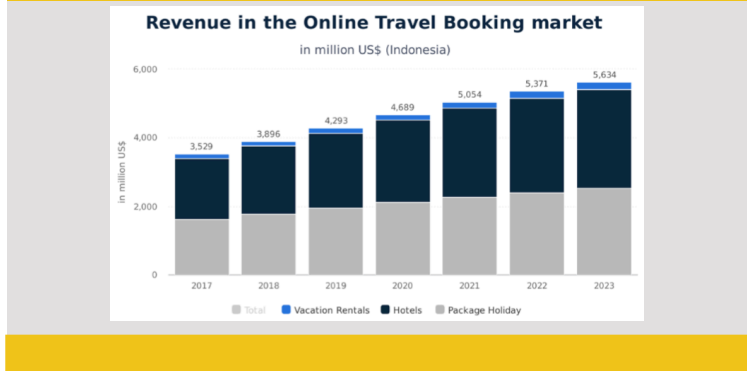


The rate of Internet penetration is also indicative of disparities between large and small cities: while the average level is 40%, large cities account for 80% of Internet users. But the trend shows steady increases and thus a gradual evening-out of disparities.

The major accelerators of online use and consumption are:

- The diversity of means of payment, from credit card to cash with reference numbers.
- Secure payments, which increases trust in vendors.
- The flexibility of delivery methods.
- Discount and reduced prices throughout the year
- The proliferation of sectors accessible online, such as tourism and travel, which is expanding particularly rapidly.

Figure 6: Revenue in the online travel booking market



The leading online travel consumers are aged between 25-34 (46%), followed by those aged 18-24 (28%) and 35-44 (25%). Logically, people on incomes are also the most numerous travellers at 45%, followed by medium incomes (35%) and low income (20%).

In addition to the experiences and enjoyment it provides through a change of scenery, a welcome break in professional life and encounters with other cultures and people, tourism is also a sign of status through which people can demonstrate that they have the means to be included as a member of the “leisure society”.

This dimension means that – even in low-cost tourism - it is important not to give the impression that the customer is only a part of mass and anonymous tourism.

As evidence of this, of all possible places to travel, Japan and Korea remain “dream destinations” for Indonesians but they are dissuaded by the perception of it being extremely expensive.

DIGITAL AND PRIVACY, THE BIG CHALLENGE

The findings of a recent Ipsos survey conducted on behalf of the Centre for International Governance Innovation (CIGI) reveal that three-quarters (78%) of global citizens are concerned about their online privacy, and a majority (53%) say they feel more concerned about this, compared to just a year ago.

With 86%, Indonesians are among the most worried, after South Africans (87%) and at the same level as South Koreans.

Seven in ten global citizens are concerned about the online privacy of their immediate family, with this proportion similar in Indonesia, at 68%.

Indonesian citizens are more worried about the online privacy of other Internet users in their economy than the global average (55%) with 76% indicating concern, a proportion equal to Pakistan and just less than India's 77%.

What are the causes of this stress on privacy?

- National governments: majorities in all economies think that their own government contributes, at least somewhat, to heightening online privacy concerns. This is as high as 72% in Indonesia.
- Foreign governments are also considered a concern, by an average of 61%, but particularly in Indonesia, who ranks second with 75%, between the USA (77%) and Mexico (72%).
- Internet companies: 74% of global citizens feel as though Internet companies are part of the problem when it comes to increasing concerns about online privacy, and this is higher in Indonesia, at 78%.

- Cyber criminals: the vast majority (81%) of global citizens say that cyber criminals have contributed, at least somewhat, to increasing their online privacy concerns. Virtually all Indonesians agree with this statement- 95%! Concern about cybercrime is growing worldwide, but Indonesia has been the most concerned country since 2016, when the survey was first run
- Other Internet users: seven in ten (71%) global citizens think that they are contributing sources when it comes to their growing online privacy concerns, with a high of 84% in Indonesia and a low

Fewer than half of global citizens are confident that any of the algorithms they are using are unbiased. On this, confidence related to social media news feeds is the lowest (at 32%). In Indonesia, 52% are on the same map. With the exception of Indonesia, Mexico, Egypt and India, fewer than half of global citizens in all other economies are at least somewhat confident in the unbiasedness of social media news feeds.

Similarly, only about half worldwide (48%) agree that their government does enough to safeguard their online data and personal information, with citizens in Europe (45%), North America (38%), and G-8 countries (39%) among the least likely to agree with this statement. Indonesians are the most trusting of all countries surveyed in this sense, as 77% agree that their government is doing enough to protect their data. India is close behind with 71, while citizens in Japan (27%), France (31%), and the United States (35%) are by far the least likely to agree with this statement.

POINT OF VIEW

The arbitration between privacy and access is a crucial issue for all online players. The consumer must give information that involves his/her privacy to access social networks or commercial sites. This is the counterpart to enjoying free services or discounts.

Geolocation, smart transportations and smart cities, video surveillance, big data... all these developments will further accentuate concerns about privacy. Between technological progress, optimization of services, data transparency and permanent control, where should we put the cursor?

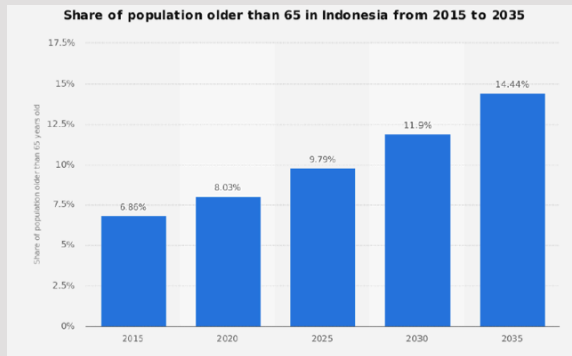
Concerns about the use of privacy data are already increasing: lack of trust is one of the reasons not to shop on the Internet, for instance. This is a real danger for companies that must find the pillars of the commercial relationship and reassure their customers on all peripheral threats, in particular data security.

INDONESIA'S DEMOGRAPHY

Ageing populations

In 2035, the percentage of the population of Indonesia above the age of 65 is forecasted to be at 14%.

Figure 7: Share of population older than 65 in Indonesia from 2015 to 2035



Let's take a look on an Ipsos survey about ageing conducted in 30 countries. Although Indonesia was not in the scope of this survey this time, the issues discussed provide a useful framework for considering Indonesian society, too.

1. OPTIMISM ABOUT LIFE

Globally, just one in three (33%) are looking forward to old age. There are some significant differences between countries, with some feeling much more positive about old age than others, including three quarters (73%) in India and two thirds (67%) in Turkey. Only six countries feel positive about ageing, on balance. At the other end of the scale, people in Hungary are least optimistic; only 7% say they are looking forward to old age and people in Japan are similarly negative (10%).

While people around the world recognise that there are positive aspects to getting older, including having more time to spend with friends and family, more time for hobbies and leisure, more time for holidays and travel and giving up work, they also identify a number of downsides.

Globally, three in ten worry about not having enough to live on with a quarter worrying about losing mobility and losing memory.

Despite this, a majority expect to be fit and healthy in old age (57%). There is considerable variation between the countries surveyed. Nine in ten of those in Colombia, Argentina, China, Peru and Malaysia (89%, 88%, 88%, 86% and 85% respectively) share this sentiment. In comparison, those least likely to agree are South Korea (17%), France (20%), Japan (23%) and Belgium (24%).

Taken together, this results in high levels of concern about later life. Globally, half of us (52%) worry about old age, rising to more than seven in ten in Brazil and China (72% in both countries) who agree with this. Those in South Korea are least concerned; only one in six (16%) say that they worry about old age.

2. WHEN DOES OLD AGE BEGIN AND WHAT DOES IT MEAN?

Looking at global averages, we think old age begins at 66. The biggest determinant of when people see someone as being old is their own age; the older people get, the more likely they are to define “old” as being something that happens later in life. To illustrate, those who are 16-24 believe old age begins at 61. This rises to 72 for those aged between 55-64. Variation in countries is also significant; in Spain, you will only be considered old at age 74, whereas in Saudi Arabia and Malaysia, old age comes decades earlier (55 and 56 respectively).

When asked to select words to describe old age, the most commonly mentioned term is wise (35%). Next in line is frail (32%), followed by lonely (30%), with only a quarter saying respected (25%)

Three in five (60%) agree that people don’t respect old people as much as they should. Agreement is highest in the LATAM countries (81% in Brazil, 79% in Colombia, 76% in Argentina and 75% in Chile). At the other end of the spectrum, only a quarter (26%) of those in Saudi Arabia agree with this, and a third (32%) of those in Japan.

3. REPRESENTATION IN THE MEDIA

Opinion is polarised on how old people are depicted in the media. Only three in ten (31%) think that TV, film and advertising make old age seem exciting and full of potential while roughly the same proportion (29%) think that TV, film and advertising make old age seem depressing, with limited opportunities.

The countries most positive about the representation of older people in the

media include China (52%), Russia (44%) and India (43%). In Turkey, nearly half (48%) think that TV, film and advertising make old age seem depressing, with limited opportunities. Some LATAM countries are also negative on this issue – in Chile, Mexico, and Peru roughly two in five (39%, 39% and 38% respectively) and over a third (36%) in Colombia think this.

4. POLITICAL POWER

Globally, only three in ten (29%) agree that old people have too much influence, politically. On balance, people disagree with this sentiment (35%). However, there are some differences by age, with younger people more likely to think that old people do have too much influence politically. For instance, two in five (38%) of those aged 16-24 agree while only a quarter (27%) disagree.

People in Romania are most likely to agree that old people have too much influence (45%), followed by Malaysia (44%) and Japan (42%). Least likely to agree are those in Australia (17%), Russia (18%) and Belgium and Sweden (both 19%).

5. THE POTENTIAL FOR TECHNOLOGY

Globally, we are techno-optimists; over half (55%) agree that technological developments will improve old age for a lot of people. Only one in seven (14%) disagree.

However, there are significant differences in agreement by country. Four in five (81%) people in China agree that technological developments will improve old age for a lot of people. The next most positive countries are Brazil (66%), Turkey

and Argentina (both 65%).

People in Japan are least convinced about the potential for technological developments to improve old age for a lot of people. Here, only two in five (41%) agree with this statement. People in Belgium and France are similarly cautious (44% agree in each country).

6. PREPARING FOR LATER LIFE

Around the world, two thirds (64%) think that it is possible for people to prepare for old age so that they are healthier and better able to cope.

People in some LATAM countries seem to have most faith in their ability to prepare for old age; in Mexico, Colombia and Brazil, four in five agree that people are able to prepare for old age (83%, 80% and 79% respectively). Four in five in China (79%) also agree with this. People in Russia (57%), the Czech Republic (51%) and South Korea (49%) feel least able to prepare for old age.

Globally, people have a clear idea of what we should be doing to prepare for later life. The most commonly mentioned responses are staying healthy by exercising regularly and eating a healthy diet (60% and 59% respectively). Saving enough money for an adequate pension is mentioned by half (51%) and avoiding smoking, having a good circle of friends, and having a sport or hobby they practice regularly are cited by over two in five (45%, 44% and 44% respectively).

However, there is a gap between what we know we should do to prepare for old age, and what we are doing. When asked what people are doing in order to prepare for old age the most popular answer globally is avoiding smoking,

mentioned by over two in five (45%). A similar proportion also mention eating a healthy diet and avoiding too much alcohol (43% and 40% respectively). Under three in ten (28%) mention saving enough money for an adequate pension.

WHAT IS SENIOR?

Spontaneously, we think that “Senior” encompasses a homogenous population, with the same experiences and values. But another question is relevant as well: What is a generation? Clearly, a community of emotions and experiences. In the case of Europe, they are determined by three categories of influences: the geopolitical context, major cultural events and technological revolutions.

In Europe, “Baby Boomers” pinpoints people born between 1945 and 1974. But it is not its date of birth that produces a generation, but what they experienced at 15 years old, the age when teenagers begin to become aware of their surroundings and are informed by all they hear, see, discover and learn.

Whether in the media, topics in family discussions, with classmates, in the street with movie posters, ads, teenagers (15-16 years of age) are shaped by a whole system of influences and emotions that crystallize in a generational collective unconscious that will determine the values, references, tastes, fears... specific to a historical, social and cultural sequence. In France for instance, what is in common to a person who turned fifteen in 1962 and another in 1979?

The first is contemporary with the “Evian Agreement”, signing the end of the French Colonial Empire, the failed attempt by a secret army to kill the President, the Franco-German reconciliation after the WWII, like the break between the Soviet and Chinese communist parties, the Cuban crisis...

1962 is also the first voyage of the biggest French steamer, the first flight of an American in space (John Glenn aboard the capsule Mercury MA-G), the launch in Cape Canaveral of the first US-British satellite, which flies over Venus and sends data on the temperature and atmosphere of the planet.



On the cultural front, the year is marked by the first issue of the magazine the passing of Marilyn Monroe and Elizabeth Taylor, the first concert of the Rolling Stones. Two fetish watches are emerging, emblematic of the competition between two eternal rivals, the Rolex Submariner for James Bond and the Omega Speedmaster for NASA.

Thus, the geopolitical climate, technological breakthroughs, cultural environment, these three “informations” constitute and program a generation. That of teenagers 1962 are determined by these influences: an acute awareness of war and peace, a culture of glamor, the dream of conquering space.

Let’s transpose the model to 1979. What do teens hear about? The second oil shock and the endless increase in fuel prices, the Lebanon War, the Iranian Revolution, the Afghanistan War, the end of the Pol Pot regime in Cambodia, the calls for the boycott of products made in South Africa against Apartheid, the second year of the pontificate of the Catholic Church Leader John Paul II, and the birth of the EMS, the European Monetary System.

Two technological breakthroughs: the Walkman by Sony and the Skateboard. As for models and icons? Music: Pink Floyd, Richard Cocciante, Billy Joel, Gloria Gaynor, Village People, Supertramp, Abba, The Police.... A genre is born, the "Disco"! Movies: Alien, Apocalypse Now, Hair, Kramer vs. Kramer, Moonraker....

So, what does this person who was fifteen in 1979 and the first in 1962 have in common? The same climate of wars and international tensions, but an emancipation, an independence made possible and amplified by the times, which invites to a certain euphoria, an energy, a freedom (in a word) whose spirit "Disco" is the best illustration.

Technological markers are at least as important as the geopolitical or cultural context.

SENIOR IN INDONESIA

Thinking of the senior citizens of today, who would have been teenagers in 1962, at a time when President Soekarno declared that he will "crush Malaysia" (Ganyang Malaysia), when Indonesia was allied with the socialist bloc and China (on the Jakarta-Phnom Penh-Hanoi-Beijing-Pyongyang axis) and Papua was of the archipelago, we can very quickly feel the acceleration of time and passing of history.

Similarly, being a teenager in 1980 was to know an era when oil accounted for 80% of Indonesian exports and brought welcome income to finance the development of infrastructure, health systems and education as well as state industries, which has now changed.

To be a teen in 2019 is to live yet another catalogue of experiences, in which more and more progress is integrated into everyday life.

Regardless of age, the ability to access running water from a tap, instead of risking poisoning yourself with toxic water or having to boil it as well as having an electricity supply that enables the switch from kerosene lamp to a lampshade and from charcoal irons to electric irons are technological breakthroughs far more concrete and meaningful to people than walking on the moon.

With respect to whether or not progress has been made, communities of experience create the same attitudes and behaviours in people, transcending the point of chronological age and the geopolitical contests.

There is a great deal in common between a 60-year-old woman and a 15-year-old boy who must fetch water from a well and walk because there is no public transportation. And they share the same positive experiences when for the first time they have running water at home and can take a bus to the market or school.

This can explain why Europe is often nostalgic about the past while Indonesia is not. In one case, people regret the passing of time because they are afraid of the future; in the other, the past is synonymous with poor health, hardship and difficulties of all kinds.

To be connected with the stages of life of Indonesians, marketers and advertisers must reflect the emotions and experiences that create a community, beyond age groups. The consumers are happy to discover good memories and experiences thanks to the brands.

Of course, we must not forget the concrete aspects of ageing (health, mobility, vulnerability), but we must also speak about pleasure, desire, desires and not only needs and constraints. We must focus on all those positive experiences that have accompanied and transformed their lives.

THE GOLD GENERATIONS

It would be interesting to know how many 65 and over feel they are much younger than their age ... So how to address them without falling into the youth or the caricature of the grandpa or grandma?

Their desires and aspirations come very close to those of the younger age groups. Today, "Senior" does not correspond to the personal feeling of age in a context of generalization of the mainstream style. Fashion and the technologies smooth the generational differences and many of those 60 years and above have the look and the equipment of a Millennials.

The professional reality is changing the game, with the participation rate of those aged 55 in the world of work rising, encompassing multiple generations and where seniors are also trained in and familiar with communication technologies.





In Europe and in the US, the current social models such as stepfamilies, late births, divorces after 65 years-old and lifestyles are changing the landscape. But, even in a more “traditional” society like Indonesia, the question of how to represent 60+ is worth asking. Do we stay loyal to the old models or progressively integrate new trends?

Strategists and marketers must identify the points at which a “generation effect” - a community of experiences – crystallize. Then they can target consumers with the positive reminders of how they have moved from the “without” years to the “with” year, either through technical revolutions or democratization.

They must also consider the fact that the income level and purchasing power of those aged 60 and over will increase, echoing the emergence of the middle class. Otherwise, the desire to have fun, to play sports, to be in good health for as long as possible, to travel and so on opens up new territories and business.



INDONESIA'S MOMENT IN THE SUN

INTERVIEW



By *Siddhartha Ghosh*,
Ipsos UU

To start, could you give us few words on the Indonesian and it's people?

Today, Indonesia is known for traffic jams, bad roads, natural disasters... But the country has grown 5% annually for three years. Even if it had previously been a high as 7%, this an enviable figure that many countries would like t. Indonesia is good place to be. Things are changing, especially with infrastructure which is growing everywhere and is not Jakarta-centric. Changes also come with the arrival of investors and multinationals to Indonesia. The establishment and diffusion of the middle class is also a phenomenon to consider.

Significant trends that we should pay attention to include:

- People have easier access to information and data than before. Indonesia is opening up to the world with much more willingness than others in the region. It is a country that wants to learn and is optimistic.

- Expectations are heightening, as consumers want empowerment and entertainment. We see this in the transition from unbranded products to branded products, with the idea that brands are a guarantee and a marker of quality that gives us more confidence. Companies can make more money from the

consumer is happy to pay more for this confidence and positive brand image.

- Brand premiumization is growing in parallel; there are not only products for the mass market.

- Consumers are more and more fond of customization, recognition and status. This involves the traditional players (fashion, food, automotive...) and now the real estate and condos market.

- New players, services and markets are developing in response to an ageing population, in particular ageing women, and the underserved needs of this segment, including health concerns.

- Green and Corporate Social Responsibility are now considerations for affluent consumers who are more and more aware of respecting societal and environmental standards. It is true that Indonesia is unfortunately the victim of recurrent disasters that show the urgency of finding solutions.

How does this impact your work?

Our business is evolving: qualitative studies are growing, and the work today is very different, more sophisticated. We combine Usages and Attitudes, Concept Test, Strategies and, because companies have an inclination to create brands, we have business tools to work on branding, positioning and launching, in particular thanks to Censydiam, a framework totally focused on the person and reveals what human motivations are activated in a specific category. this internationally validated and helps our clients to understand consumers in depth, obtaining workable insights that will guide future strategies.

Where to position Indonesian consumers?

Figure 8: Diagram



Conviviality has for a long time been in the DNA of Indonesia, a melting pot of people living together. 'Recognition' and 'Vitality' are the emerging drivers now.

Recognition refers to Customisation, being recognised for what one is, and obtaining products and services that are a better fit with one's needs, rather than "one size fits all". It also refers to specialist solutions and products made from superior ingredients. While this has always been there in bigger ticket purchases such as automotive, luxury products, technologies, FMCG brands are surely but steadily tapping on to this need and developing more value-added, and hence, revenue-generating products, for the slightly more discerning consumers.

Vitality is about adventure, pushing my limits to the test and discovering new things. It means leaving our comfort zone to explore our environment and

achieve independence, away from the rest. Therefore, we travel and experience exotic and unusual situations to be stimulated and excited. This element explains why Indonesians are courting the new; be it products, services or even mobile phone apps, many of which may not be available at the store near them, but with online suppliers. While China and India are among the most frequent online purchasers, with 17% and 16% buying goods or service more than five times a month, Indonesia is already number 6 with 9%.

And today?

Enjoyment and **Belonging** are the two main motivations.

Enjoyment *relates to maximising the pleasure that one gets out of life and only thinking about having a good time, without concern for the consequences. This trend is growing because consumers want to be excited, like abundance.*

Belonging *is related to seeing myself surrounded by people who accept me as I am, as an equal, and who make me feel welcome. One area of this is related to following the norms and traditions simply because we are part of a culture or group. This trend is growing as well because there is still a part of people that is conservative and remains loyal to traditions.*



This Batak calendar reflects a sense of the time.

A close-up, low-angle shot of a person wearing a VR headset and large headphones. The person is looking upwards and slightly to the right. The entire image is bathed in a warm, reddish-orange light, creating a futuristic and immersive atmosphere. The background is blurred, showing some structural lines. A yellow rectangular box is superimposed over the center of the VR headset.

TRENDS & CHANGES

WHAT DOES THE E-COMMERCE INDUSTRY NEED TO DO TO EMBRACE THE 4.0 ERA?

B2B and B2C communication and distribution models are well known. With online exchanges between customers, to comment, judge, buy or exchange, a third model is born: the C2C, the digital society.

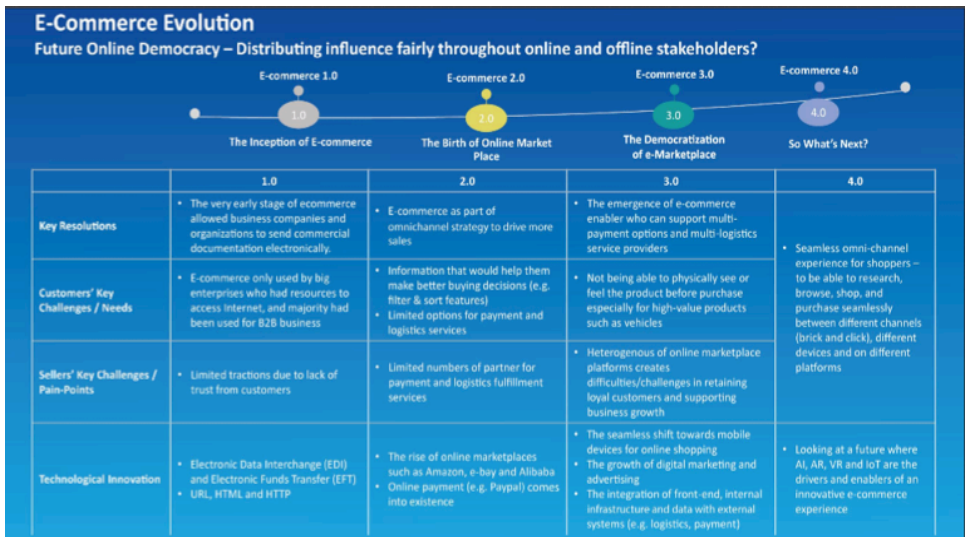
And now, the fourth model is born: the C2B. The consumer wants to choose his distribution channel, as he wants to choose products that correspond to him. The common point between e-commerce and e-industry is “personalisation”:

- After the long period of mass production and standardization of products that has characterized the consumer society since the 1930s (personalization being reserved for the luxury sector and the most expensive products), Industry 4.0 aims to promise consumers' smart



production, i.e. customized, adapted or unique products suited to the consumer’s personal preferences. Directly involved in the production line, the consumer communicates with the machines and the robots, and controls the line. The challenge is to maintain gains while moving from the good old mass-market era to today’s ego-market and its lower manufacturing volumes.

- Distribution 4.0 had to adapt to the consumer and rethink sales outlets, modes and places of delivery (at home, in the office, or even at the restaurant during a lunch). It must also integrate its values: a consumer concerned about the environmental impact of his purchase may not have the same behaviour as a customer in a hurry. For one, Corporate Social Responsibility (CSR) will be important, for the other, only speed will be judged.



To fully understand the issues and revolutions underway, Ipsos organized a Marketing Summit : “E-Commerce 4.0, What’s Next, Demistifying The Future of E-Commerce in Indonesia“, honored by the presence of Triawan Munaf, the Chief of Indonesia’s BEKRAF (Badan Ekonomi Kreatif or Board of Creative Economy), Yustinus Prastowo (Economic Observer) and Kusumo Martanto (CEO of Blibli.com).

THE ERA OF INDUSTRY 4.0 IS APPROACHING

Everyone concerned and involved, whether from government offices, private sectors or other supporting elements are anticipating it by implementing necessary efforts. How Indonesia’s e-commerce players are getting ready to embrace the industry’s new era in which digital technology and Internet will dominate: that is the question.

“The question has now evolved around on how far the players and the adopters of the e-commerce industry prepare to strengthen their presence within the industry while at the same time leveraging their contributions to the country’s economic growth, especially in the times of Industry 4.0,” said Yustinus Prastowo, an Economy Observer. *“We’ve learned how e-commerce has become one of the great contributors towards the performance of the economy and have shown their success in attracting investors both from home and overseas in the last 3-4 years. It is the task of our government to fully support this movement, not only facilitating it with supportive regulations, but also being proactively involved in accelerating it and designing comprehensive policy to this effect.”*

E-Commerce in Indonesia has also already shown many initiatives to support small and medium business enterprises in Indonesia by exploring the capabilities the digital technology.

This is not only on the marketing aspects, but also in expanding their logistics and distribution reach. Something that has never been imagined before is now possible: a small business owner in the western part of Indonesia can reach a consumer in the eastern part of Indonesia, and vice versa. What makes us even prouder is the fact that e-commerce players also have helped those without business experience, giving them the opportunity to plunge themselves in the business sector, through the help of technology in selling and marketing their products or services.

Aside from the promotional activities that the likes of Blibli.com, Bukalapak, Lazada, Shopee, and Tokopedia regularly conduct to increase transaction traffic and volume, they also have come up with innovative solutions inspired by Chinese's marketplaces. For example, the Special Day Flash Sale, such as 11:11 or 12:12, which has gained popularity. Or a National Day for Online Shopping, known as HARBOLNAS (Hari Belanja Online Nasional) which has helped to build strong and specific branding for e-commerce.

HOW TO EMBRACE THE E-COMMERCE 4.0

Ipsos conducted a study to deeply understand the performance of the e-Commerce industry so far, and to learn about consumer behaviour in using the services offered by the marketplace. According to the study, the big five online marketplaces most used and searched by consumers are Blibli.com, Bukalapak, JD.id, Lazada, Shopee and Tokopedia. While the category the consumers purchased most often and shown most traffic and big transaction values are fashion and sport apparel, electronic and gadget, bill payment and beauty products.

As far as the payment method is concerned, 26% of e-Commerce consumers in Indonesia still use the conventional payment method, followed by e-banking or online payments (19%). As for logistics or shipment, standard delivery is the option that 62% of consumers still choose.

THE VIEW OF KUSUMO MARTANTO, CEO BLIBLI.COM

"As a business player in the e-Commerce industry, we have a strong commitment in continuously coming up with innovative solutions for the online environment and platform that Blibli.com operates on. Customers are our main priority and is our base for delivering quality products, facilities and convenience in online shopping, including the 24-hour customer care, a 15-day return policy, free delivery cost and delivery speed.

Another element that is also important and we rigorously keep improving is a comprehensive and safe payment system. This has been a challenge for the E-Commerce industry community.

In anticipation of E-Commerce 4.0, Blibli.com has already launched an innovative O2O service that combines an integrated offline and online shopping experience for our customers. This has helped to improve convenience in doing the transaction through e-Commerce. In the near future, consumers will be able to browse or search for products through monitor screen, but they also have the see-touch-feel experience of the products they want to purchase. And with just one click, a transaction can be done and the items they purchase will be delivered to the destination.”

POINT OF VIEW

Four major pillars of Industry 4.0 that need our attention and support:

- 1. The infrastructure to facilitate and ease the industry players in developing and presenting their latest innovations.*
- 2. The readiness of consumers and business partners in adopting the technology and innovations.*
- 3. The diversified category to answer a variety of needs and demands from consumers.*
- 4. The ability to improve and leverage the creativity of business owners in taking advantage of the available platforms.*
- 5. Last, but not least, is the ability of the E-Commerce industry players to deliver products or services that are based on comprehensive research.*

Soeprapto Tan, Managing Director – Ipsos Indonesia

E-COMMERCE, NEW BEHAVIOURS AND INNOVATIONS



By Andi Sukma
Head of Observer



By Indah Tanip
Associate Project Director
Observer

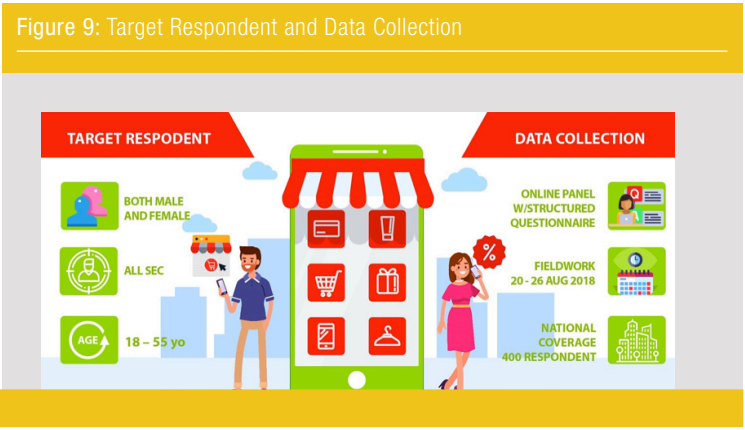
According to the Indonesian E-Commerce Association (IDeA), the contribution of e-Commerce to Gross Domestic Product (GDP) reached 2%. The Indonesian government also estimates that E-Commerce's contribution to gross domestic product (GDP) is 10% in 2020, along with the target of positioning Indonesia as an e-Commerce centre in ASEAN.

What are the habits of both Millennials and other generations who shop online? Our *e-Commerce Outlook 2018* study looks at finding the answers...

THE NEW INDONESIAN SHOPPERS

This study was conducted by distributing online questionnaires to Ipsos' online panel respondents from the online community (netizens) across Indonesia. The questionnaire starts from which E-Commerce that mostly visited until which payment method that they used most often

RESPONDENT CRITERIA AND METHODOLOGY



The survey will be the starting point for other of e-Commerce studies which will continue in 2019. Ipsos has an initiative to collaborate with IDEA and some big players on E-Commerce for a syndication study “Indonesia E-Commerce” giving appreciation to the most visited E-Commerce companies and has the highest online shopping transactions in Indonesia.

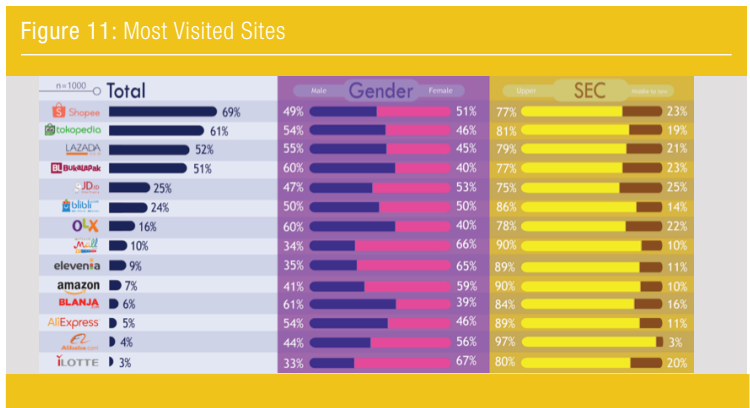
The first learning is that, the Millennial netizens shop more in E-Commerce. Furthermore, the profile of the people who shop in E-Commerce majority skews toward the upper-class, who have a monthly income of at least 3 million rupiah and tend to be working and married. This shows that people who shop online have buying power to determine which website to choose.

Figure 10: Online Shoppers Demography



The second learning according to the new Report Ipsos Marketing Summit - E-Commerce 4.0, Shopee is the most regularly visited e-Commerce site visited (it was second last year), followed by Tokopedia (first last year), Lazada and Bukalapak. Shopee skews to female shoppers while Tokopedia, Lazada and Bukalapak skews by male shoppers.

Figure 11: Most Visited Sites



Website or app users from those five companies do more purchases than just surfing. This means that the strength of the shopping platforms is one the most significant criteria, sometimes before the desire to enjoy cheaper product prices or authentic products (Statista, "The e-Commerce market in Indonesia").

A NEW WAY TO BUY AND TO DISCOVER PRODUCTS.

The "trust" to do transactions through E-Commerce companies does not come instantly. There has to be a comfortable and pleasant shopping experience to foster trust in shopping. This is indicated by the payment method shifting from cash on delivery (COD) to transfer debit. Fashion products are still netizens' favourite for both men and women.

After that, there are variations of favourite products based on gender where men are more likely to purchase technology or gadgets, electronic goods and travels. Meanwhile women are more inclined to buy cosmetics, care products, daily necessities and food and beverage products.

Adidas and Nike are the main brands purchased in the 'Fashion & Sport clothes' category, and Samsung is the top from 'Electronics and Gadgets'.

- Fashion & Sport clothes 64%
- Electronics 38%
- Technology & Gadgets 37%
- Bill payment/Top up 32%
- Cosmetics 28%
- Daily needs 28%
- Personal care 24%
- Food & Beverages 22%

- Books & Stationary 14%
- Travel 14%
- Growing up milk 10%
- Ticket events 7%
- Others 5%

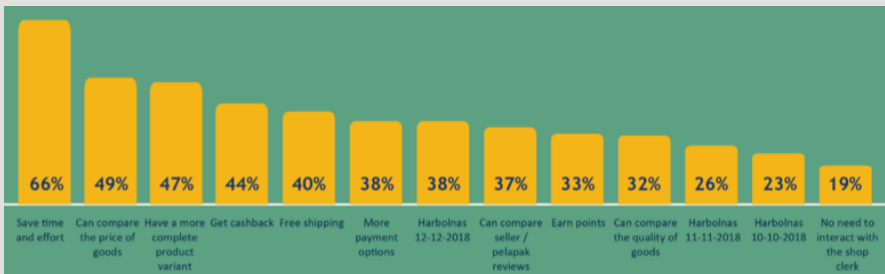
CONQUERING A NEW AND “STRESS-FREE” EXPERIENCE.

One of the main benefits of the E-Commerce is that it offers consumers a new and convenient place and time to purchase.



Saving time and effort is the main reason people visit and shop through E-Commerce regularly.

Figure 12: Main reason people visit E-Commerce



Most of shoppers could be defined as “E-Commerce planners” (35%) - males in particular (38%) - but females tend to be a promotion-seekers (19%, vs the average, 15%).

The reasons to buy online are also related to the promotional strategies of different market players, in particular « free delivery », as noted in the previous edition of Flair (2018).



IN THE FUTURE

The Click-and-Collect Model (C&CM) can be summarized as follows:

“E-Commerce companies will develop into physical stores but still carry technology in shopping. In the physical stores, visitors will still use the application in shopping but visitors can touch, hold and try products before shop on line”

71% of the Indonesians we interviewed think the C&CM is “unique”, 66% like it, and 70% believe it is “suitable”. Also important to note is that 77% believe that “this new model can attract intention to purchase”. Millennials and non-Millennials

share the same view on this.

Another development in this space that we tested is online moving into the real world, in other words, e-Commerce companies developing a process whereby products can be selected using store's online websites or apps but buyers can choose whether to have the products delivered to their home, or go to the physical stores. In this way, the buyer has the option to touch, hold, try or exchange products that have been purchased online.

This service is considered to be unique, liked and suitable for 76% of the interviewees and 79% say they would want to buy using this new form of distribution.

THE KEY FOCUS AND CHALLENGES IN RETAIL MARKET LANDSCAPE



By Andi Sukma
Head of Observer



By Indah Tanip
Associate Project Director
Observer

MODERN TRADE (MT) CHANNELS

SUPERMARKET/MINIMARKET

There are greater challenges from online platforms, especially for supermarkets and hypermarkets which rely on traffic from other businesses (e.g. malls).

Moving away from a one-size-fits-all promotion approach to unique tailored promotion by each individual stores.

Minimarkets look to increase margins by providing higher value products and ready to eat or drink products through convenience stores or white label products.

DISTRIBUTORS

Limited distribution coverage: The principal, or parent company, usually restricts where the distributor can sell the products.

Big FMCG players even directly engage with big MT retailers, where distributors only act as warehouse and logistics providers.

Stronger regulation from parent companies: For example, Unilever regulates sub-distributors operating under their own distributors by designing the marketing tools, setting up fleet standards and conducting salesperson training programs.



SFMCG COMPANIES

Weakening bargaining power: Minimarts are getting a higher market share through the rapid increase of the number of their outlets. As a result, they have more bargaining power in relation to retail prices and promotion programs

Data analytics and technology: Uncertainty in the economy drives FMCG companies to implement better analytics tools to support market predictions. However, unstructured transactional data is a key challenge, especially in GT channels

E-commerce & Digital Marketing : Currently, FMCG companies have launched B2B accounts in e-marketplaces. They need to anticipate distribution approaches if there is to be a revolutionary shift from offline to online

GENERAL TRADE (GT) CHANNELS

Distributors

Reduce logistics costs: Technology will play crucial roles in optimising logistics processes. Distributors are trying to find the optimum ratio between taking orders and direct on-site sales (i.e. canvassing).

Optimize the numbers of salespeople: Different sales approaches require consistent and standardised skills and process. Distributors need to figure out the optimum sales person : stores ratio.

GT distributor roles mainly cover sales and distribution, as they they have traditionally had very limited roles in marketing and promotion since normally both « above the line » and « below the line » communications are designed by the parent companies for the market.

RETAILERS

All transactions are generally recorded manually. This is considered a constraint for GT players to grow more competitively against MT where they can leverage data and technology.

GT retailers have some limitations in selling some products (for example, most retailers of chocolate do not distribute their products to GT due to melting issues) and they still rely on sales people to visit from distributors to take orders.

It is difficult for smaller players to grow quickly: they acquire a lower margin due to lower sales volumes and being busy with day-to-day operations hampers innovation and the time and effort needed to think outside the box.

POINT OF VIEW

Ipsos sees the growth of E-Commerce as a positive development for business people, consumers and society in general. For business people, E-Commerce has an impact on reducing operational costs.

There is the opportunity to widen market share because the budget designated for marketing activities is not usually balanced with the needs for business expansion.

It also provides a more equitable economic boost to the regional economy because E-Commerce is not hindered by distance.

THE KEY TO SUCCEED



SURFING ON THE WAVE



By Andi Sukma
Ipsos Observer Indonesia



By Indah Tanip
Ipsos Observer Indonesia

TO START, COULD YOU GIVE US FEW WORDS ON INDONESIA AND ITS PEOPLE?

We are in a favourable, dynamic, mobile context. We see this in the rapid development of infrastructure, construction sites, highways. This involves all regions. We also see it with the booming digital landscape, digital networks, the constant increase of Indonesians who access the Internet and who have a smartphone.

Progress rates are not slowing down: in 2017, 84 million people were accessing the Internet in Indonesia. This figure is projected to grow to 150 million in 2023. With over 104 million Internet users, Indonesia is one of the biggest online markets worldwide. Popular online activities include mobile messaging and social media. The most popular social network in Indonesia is Facebook, with 48% of the population using the platform. Indonesia is also one of the strongest markets for LINE's chat app. Mobile Internet usage is undergoing double-digit

growth rates and currently stands at close to 30% among the population .

On another point, there are more distribution channels and we are now beginning to take an "omnichannel" customer approach. The most important thing is to give them the opportunity of an experience, a fluid feeling. This is the O to O: off-line to on-line, on-line to off-line

HOW DOES THIS IMPACT BUSINESS?

The competition is more intense and aggressive than ever! Millennials are the number target; these are the locomotives of the market and, from Alibaba to lesser-known platforms, all players want to conquer them. It is the total competition, between online sites, and with traditional retail, which has a lot of difficulties. Who would have said Shopping Malls would close in Jakarta? But E-Commerce has a potential that seems limitless, with the clientele of women being first.

Moreover, there are no huge gaps between what the Millennials and Non-Millennials do. Even senior citizens are opening their minds and becoming familiar with the technologies. But, they differ from the other two populations in the sense that they tend to be more loyal to brands. But their loyalty will be challenged by multiple temptations: now, people are exposed to more than a hundred advertisements a day!

Hence the importance of business tools that allow to spot the NPS, (Net Promoter System, originally Net Promoter Score). Net Promoter Scores are calculated using the answer to a single question on a 0-10 scale: "How likely is it that you would recommend [brand] to a friend or colleague?" This is known the Net Promoter Score question or the recommend question.

Respondents are grouped as follows:

- Promoters (score 9-10)
- Passives (score 7-8)
- Detractors (score 0-6)

Net Promoter System encompasses features like understanding why people are promoters or detractors and how to improve the experiences that companies deliver.

HOW IS MARKETING EVOLVING?

In the 90s, the logic of “one to many” prevailed. It was first used when one-to-one market-ing was taking shape, with the aim of perfect differentiation. It expresses the marketing process of a company addressing many potential customers without adapting its message or the nature of its offer. It represents what was previously called “mass-marketing”.

Given the fact that different approaches could be taken that sit somewhere between a one-to-many marketing and a one-to-one marketing, some imagined the expression “one-to- few”. One-to-few marketing (one-to-few marketing) is therefore the marketing approach of companies that chooses to address only a few identified customers who meet the certain criteria of a segmentation.

That means that we need more appropriate business tools. Fortunately, thanks to Neurosci-ence, Censydiam , Behavioural Science web listening, micro-social online communities... it is now possible to refine the segmentations by the consumers' motivations, to spot their unique characteristics and influences.

THE MARKET FOR STUDIES IN A DEVELOPING COUNTRIES



By Maulana Lazuardi,
Customer Experience - Market Research

UNDERSTANDING SOCIETY.

As well as the large international companies such as Ipsos, a market for consulting and data providers is also developing with local players. Expertise in gathering information, coaching clients and being a true partner are the major points of differentiation.

It is valuable to be able to detect and explore changes in society and capture the underlying trends. Indonesia is gradually changing, even if the values that structure society remain very strong, such as respect for elders, family, religion. For the new generation of Indonesian citizens, a number of factors including women's access to skilled and better-paid jobs, increasing urbanization, higher levels of education, openness to the world with the Internet and social networks mean that a "mental revolution" is emerging. People travel, discover other cultures and other ways of life. They become more individualistic and need to feel that brands know how to accompany their transformation - with customized products, for example.

The emerging middle class also changes a lot of things: it has bankable financial power, masters technologies better than previous generations, can transform the financial industry and inform itself. It wants quick, flexible and simple solutions, likes ordering food with an app or a smartphone, wanting to pay without cash and buy online.

They are looking for ideas on YouTube thanks to the tutorials on all manner of things from make-up to tuning to recipes, and they want professional advice. The Internet, social networks and YouTube also give access to “lighter” universes where people do not want to rack their brains but where people have fun. Funny content and humorous communications are also discovered: people seek enjoyment.

And at the same time, this new middle class is aware of climate change, pollution and social responsibility. There is a delicate and complex balance between entertainment and commitment. The positioning of automotive brands with regards to transitioning to electric vehicles is emblematic in this context. Cars embody pleasure and status, but are also a source of pollution through their carbon emissions. This problem requires both a technical response (electric alternatives in all segments: cars, trucks, tractors...and a positive and inspiring advertising message instead of an obligation.

We must anticipate, identify and integrate these changes without exaggerating them but knowing which ones really influence consumers. This fine-tuning work is key to being an effective partner in knowing people as well as possible.



AWARENESS

Among the phenomena that must be considered, not all are “trendy” or “fashionable”. Obesity is a very serious problem: Indonesia’s Basic Health Survey (Riskesdas) 2018 shows that the trend of weight problems has increased from 2007 to 2018 such that now at least one in five adults is obese, and one in three adults are considered overweight.

Figure 13 Obesity

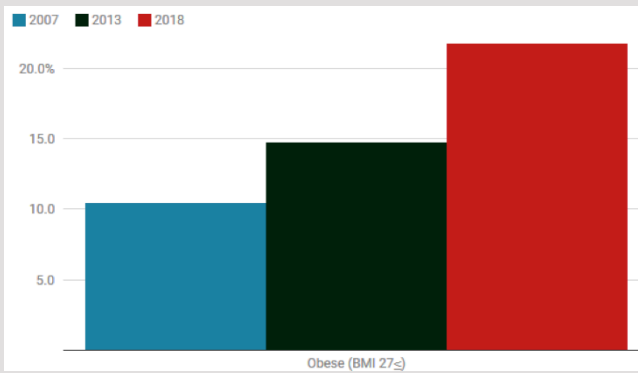
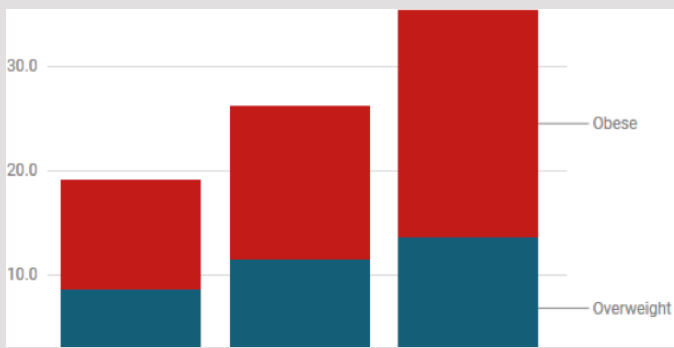


Figure 14 Body Mass Index



Overweight is BMI (Body mass index) between 25 and 27, Obese is BMI above 27

The indicator for central obesity is a waist circumference of more than 80 cm for women and more than 90 cm for men.

Obesity is a good topic area for exploring communication and nudge theories to change behaviour, and how Ipsos' expertise is working.

On one side, we see a young Indonesian population, that wants do sports and jogging, frequently goes to fitness clubs and Zumba or just look at the tutorials on YouTube and tries to eat as healthy as possible. Brands like Nike address this population through the concepts of challenge, competition and overtaking.



Changing behaviours is one of the most difficult things for people: we can see this with the ongoing campaigns against smoking, drug use or driving risks, to encourage waste sorting, and so on.

The communications often work on two levers: to obtain a reward and/ or to avoid a punishment. This logic of bonus/malus or carrot/stick does not engage the individuals personally but takes them back to a parent-child relationship. They obey instructions because they feel they have no choice, but then free themselves as soon as they can. This is the reason why people are not mobilizing deeply and durably, or continuing behaviours in secret.

All the tension at work in this way of communicating can be summed up in four phrases: I must, I want, I know, and I can.

I MUST = the speech of the authorities which implies changes of uses and contributions (to do without plastic bag, to sort waste, to buy ethics, to pay new taxes ...). This is the maximum of constrained citizenship.

I WANT = Involvement in and commitment of personal actions from a place of awareness and sensibility, independently of or as a result of outside influences This is the maximum of citizenship good will.

I KNOW = what everyone understands about information related to the topic, to what degree do we feel concerned and involved. This is the maximum of conscious consumption or indifference.

I CAN = what everyone can concretely do within the parameters of their existing lifestyles (large city or rural area), infrastructure, resources, services and packaging available, for example the maximum of the dependence upon reality (what is set up in the city, the building, the company, the distribution, the transport...).

Two dimensions are in play: to renounce/entrench or to detach/assume. The first is frustration, in other words "I have to do, but I do not want to". If people are not convinced and feel that they have to resign themselves to obedience because they have no choice (because of repression, fines, taxes and so on), they do things despite themselves. The second is a personal choice in link with involvement and self-esteem.

The worst combination is: "I want to, but I cannot." For example, someone wants to sort their garbage, but there are not enough containers to do it. They would like an electric car but either it is infinitely too expensive, or there is no electric alternative to the existing offer (there are no electric tractors, no electric livestock, no electric containers). Or the technology is not adapted to the needs (insufficient autonomy) and other problems arise, such as that of scarce resources.

To engage people, we must break away from this tension by positioning ourselves on other contents, other values and other relationships. associate changes and personal benefits.

INNOVATIVE AND INTERACTIVE SOLUTIONS.

E-Commerce challenges the ways that we can explore the customer experience. Mystery shopping is already a specialty of Ipsos, who uses its expertise with the acquisition of Market Pulse International, a company that offers customer experience insights based in South East Asia. Market Pulse International has been in operation in Asia Pacific for over 20 years and has established a market-leading position in mystery shopping and retail auditing.

When used effectively, Mystery shopping research can be a powerful performance management tool that creates awareness around important standards or initiatives and drives organisational behaviour change — all in the spirit of better serving the customer.

But we find that mystery shopping methodology is often misused, and weak

programme design is usually at the root of issues that cause poor return on investment.

Today, the applications go beyond checking compliance at brick-and-mortar locations to also better understand sales recommendations and test across all customer channels, leveraging new technologies to enhance capabilities.

In parallel, Customer Journey Mapping is the process of graphically diagramming components or mapping comprehensively the journey or journeys customers take as they interact with organisations, whether those interactions are marketing communications, products, service experiences, or any combination (organisation-controlled or not) that impacts perceptions of the customer experience. It also integrates practices in social media, how the consumer seeks, inquires, buys, arbitrate.

POINT OF VIEW

In order to abandon the strategies of of infantilising and guilt, it is necessary to identify the positive priorities to create the conditions and the opportunities of the passage to the act, in particular using a “Nudge strategy”. This approach involves four steps:

1. Observe and reveal behaviors as they really are using Behavioral Sciences.
2. Identify barriers inhibiting the change.
3. Identify positive priorities that will reverse the scale of beliefs and create other behaviors.
4. Recommend, evaluate and support the strategies implemented in societal terms.

In short, the term “Nudge” in Behavioural Science goes back to C. Sunstein and R. Thaler . As individuals are limited by bounded rationality in their decision making, nudges are used to help guide them to make more optimal decisions. Broadly, a nudge, is any aspect of the choice architecture that alters people's behaviour in a predictable way without forbidding any options or significantly changing their economic incentives. To count as a mere nudge, the intervention must be easy and cheap to avoid. Nudges are not mandates: while putting fruit at eye level counts as a nudge, banning junk food does not .



THE ART OF BRANDING



By Bipradeep Chakraborty

Creative Excellence



By Mia Latif

Creative Excellence

Could you introduce to us what you do?

Launching Creative Excellence is our guide to great Brand & Comms qualitative research. It is designed to offer a simple overview of all that qualitative research can offer and discover the best approach for each context. It offers a clear explanation of the strengths of each qualitative approach and the situations they best complement, along with case studies to illustrate how some of the approaches have been utilised by others.

Qualitative research can be incredibly valuable in understanding how people perceive creative content and why. Unlike quantitative approaches, qual allows you to get under the skin of your audience and delve into the thinking behind their choices. Importantly it allows us to explore consumers' spontaneous dialogue and physical and emotive responses to creative.

What are the Qualitative Services?

- **Overnight Qual.** *Provides a quick qualitative steer to optimise creative while gaining some feedback on the 'why' behind reactions.*

- **Creative Groups.** *In depth exploration of creative across all stages of development, allowing creative agency and stakeholders to view in the moment.*
- **Communities.** *Communities foster comfortable environments where members speak candidly and openly, leading to in-depth consumer understanding of creative stimuli.*
- **Semiotics/ Cultural Intelligence.** *Provides fundamental cultural insights that can be used to inform future creative. Helps explain consumer opinions and behaviours which they often struggle to articulate.*
- **Ad Safaris.** *Creative is live and consumer understanding is sought to explore impact of assets as they are encountered in real life.*
- **Goggle Box.** *Illustrates and brings to life consumer opinions towards creative in a visually engaging way.*

What can we see in Indonesia?

There are many new brands, but they do not always last long. The questions of brand value and brand performance are therefore at the heart of our surveys. Our clients understand that branding helps their organisations to be spotted, recognized and ultimately bought. More and more companies want to create brands to “name” their products, but consumers also want to identify what the brand can do more and what expertise it covers. It’s not just a name or a decorative sign!

The image and the role of the brands changes according to the sectors. For the FMCG market, they have difficulty creating loyalty. For fashion and ready-to-wear, large, international brands such as Zara still have a good reputation,

but local Indonesian brands are gaining momentum and are sometimes more expensive. For cars, Toyota's brand value is one of the strongest, for example with the Avanza model, which explains its leadership in Indonesia and Asean.

At the same time, Chinese brands are also arriving in the market, and to compete, will have to prove their brand value.

Brands must take into account two things about the Indonesian consumer market. Firstly, they are speaking to a fairly optimistic public, and secondly, a large part of the population still feels economically vulnerable. Of course, the rich may not ask too many questions when they buy, but others want to ensure that they are getting better value for their money.

People are also more digital aware, well-informed and are looking to buy cheaper. To understand brand value, you must know how people calculate their purchases. In France for example, 58% pay extra attention to their expenses by counting to 10 € (IDR 161 000) and 14% calculates even to the euro. (IDR 16 100) .

The role of the brand is to guide the purchase with the small (or large) use of envy and imagination – leaving the concrete reality to one side. This is what makes consumers willing to pay more, and on occasions spend a little more than expected. Luxury brands are the champion of this strategy: the power of their image is no limit, like the price!

What are the targets and priorities?

Brands want to recruit new categories of consumers, they target communities with niche strategies, they address specific populations, such as Millennials and Seniors, Muslims, Fashionistas....

Brand value must be immediately perceptible and tangible, otherwise the purchase decision will by default be the least expensive.

Among the elements of brand value are the perceived quality of products, the image of the brand, its reputation and the status it gives.

But brands are working more and more on the quality of their relationship with the consumer, seeking to gain proximity. A significant move here is as the minimarket begin to replace the supermarket, supermarkets are being restructured to create more privacy at the point of sale.

The retail trend is moving from the immense and anonymous space of the hypermarket to a structure that recreates proximity, life, humanity, as we can see in the shopping malls today. Brand value is also about distribution and services.



MASTERING INSTAGRAM

A study commissioned by Instagram allows us to know more about the social and commercial phenomenon of the platform in Indonesia.

With Instagram's global influence bringing consumers closer to the things they love, including Small and Medium-sized Businesses (SMBs), the platform has grown to be one of the most widely-used in Indonesia. Instagram enables the success of SMBs by allowing them to reach a broader range of customers within their own cities, throughout Indonesia and abroad.

Additionally, Instagram facilitates deeper relationships between businesses and consumers, making it easier for SMBs to attract, interact and sell services and goods, more than ever before.

Instagram's large consumer base offers great potential for small businesses to reach new customers; when interested in a business, 4 in 5 of Indonesian Instagrammers (81%) turn to the platform to learn more about them.

- 90% of Instagrammers surveyed have used Instagram to communicate with a business.
- 76% of Instagrammers have purchased from a brand after discovering them on Instagram, either locally or internationally.
- Amongst Instagrammers who have discovered a brand on Instagram, 66% are likely to purchase a product or service from the brand.

THE RISE OF INSTAGRAM-FIRST BUSINESSES

- 52% of businesses surveyed prefer to send customers to their Instagram profile instead of their website.

- 49% of the businesses surveyed strongly agree that their Instagram is more essential for their company than a website.
- 66% of the businesses strongly agree that “Instagram helps find customers in other cities, states or countries”.
- 45% of Instagrammers strongly agree that “seeing people who have started businesses on Instagram makes me think about trying to start a business myself”.

INSTAGRAM IS WHERE BUSINESS GETS DONE.

Through Instagram, SMBs are able to attract, interact and sell to consumers easier than ever before.

- 82% of Indonesian businesses receive Direct Messages from customers daily.
- 87% agree they have increased sales because of Instagram
- Just under two thirds (65%) strongly agree that Instagram Stories allows them to showcase their products/services from a new perspective.
- 63% strongly agree that they have been able to build better relationships with their customers through communication features
- 65% agree Instagram helps them in being able to develop new products based on customer feedback.

A SOURCE OF INSPIRATION.

81% of Instagrammers in Jakarta have purchased from a brand after discovering them on Instagram.

- 77% of Instagrammers in Jakarta follow businesses specifically to be

inspired to buy new things

- Over two thirds (68%) of Instagrammers in Jakarta agree they follow magazines and newspapers to get shopping inspiration
- 83% of Instagrammers in Jakarta like finding new brands or products on Instagram that aren't available in big stores

HELPING YOUNG ENTREPRENEURS (OWNERS UNDER 35 YEARS OLD) TO FIND SUCCESS.

- A majority (63%) of businesses strongly agree that “Instagram helps new businesses launch and succeed”.
- 82% of young entrepreneurs strongly agree that “Instagram helps young entrepreneurs achieve their business goals”; and 73% strongly agree “Instagram helps new businesses launch and succeed”.
- 74% of young entrepreneurs strongly agree that “their business grew out of their Instagram account”; and 71% strongly agree that Instagram gives them the power to build their business on their terms.



Song

Menaklukkan Dunia

Dalamnya lautan akan kuarungi
Gunung yang menjulang, Pasti 'kan kudaki
Rintangan yang datang, Ttakkan menghalangi
Segala niat yang telah kita yakini
Kau dan aku harus menyatu, Dan juga saling melengkapi
Tuk menggapai semua mimpi,
Menjadi yang terbaik, Jangan pernah menyerah
Menaklukkan dunia, Jangan berhenti 'tuk terus berjuang
Jadi pemenang, Tetes semangat ini, Takkan pernah habis
Selama kita terus bersama, Meski berbeda, Kita pasti bisa
Jangan putus asa, Menghadapi cobaan
Yakin dan percaya, Itulah kuncinya
Kau dan aku harus menyatu, Dan juga saling melengkapi
'Tuk menggapai semua mimpi, Menjadi yang terbaik
Jangan pernah menyerah, Menaklukkan dunia
Jangan berhenti 'tuk terus berjuang
Jadi pemenang, tete semangat ini, Takkan pernah habis
Selama kita terus bersama, Meski berbeda
Kita pasti bisa, Jangan putus asa, Mengjadapi cobaan
Yakin dan percaya, Itulah kuncinya
Kau dan aku harus menyatu, Dan juga saling melengkapi
'Tuk menggapai semua mimpi, Menjadi yang terbaik,
Jangan pernah menyerah, Menaklukkan dunia
Jangan berhenti 'tuk terus berjuang
Menjadi pemenang



Enthusiastic People at the Hot Air Balloon Festival, Pekalongan, Central Java

Conquering the World

The depth of the ocean, Will go away
A towering mountain, Must be right
Obstacles coming, It won't block
All intentions that we have believed
You and I must be one
And also complement each other
To reach all dreams, Be the best
Never give up, Conquering the world
Don't stop to keep fighting, Become a winner
This enthusiasm drops, Will never run out
As long as we continue together
Although different, We certainly can
Do not give up, Facing trials
Trust and believe, That is the key
You and I must be one, And also complement each other
To reach all dreams, Be the best
Never give up, Conquering the world
Don't stop to keep fighting
Become a winner

Energy of Asia: Official Album of Asian Games 2018

Lyrics & Music: ©Rian of D'Masiv

ABOUT IPSOS

Ipsos ranks third in the global research industry. With a strong presence in 89 countries, Ipsos employs more than 18, 130 people and has the ability to conduct research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals. They have built a solid Group around a multi-specialist positioning – Media and advertising research; Marketing research; Client and employee relationship management; Opinion & social research; Mobile, Online, Offline data collection and delivery.

Ipsos is listed on Eurolist - NYSE-Euronext. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAME CHANGERS

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, Simplicity, Speed and Substance applies to everything we do. Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“Game Changers” – our tagline – summarises our ambition.

Didier Truchot, Ipsos Chairman & Chief Executive Officer

IPSOS FLAIR COLLECTION INDONESIA 2020



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