



inMOBI

Building Resilient Brands

Gearing up for Ramadan 2021

Indonesia

Research methodology

INMOBI
Pulse

The Leading
Mobile
Consumer
Intelligence
Platform



A mobile survey conducted
using InMobi Pulse



A sample of $n=1000+$
Indonesian smartphone
users



Respondents recruited programmatically
via the InMobi mobile advertising platform
in January 2021



Results targeted and weighted to be
representative of Indonesia's
smartphone population



Understanding the Connected Indonesian Consumer

A Rising Middle Class

69%

of Indonesians earn up to
IDR 50,000,000 per
annum

A Tech Savvy People

63%

of Indonesians will
make purchases this
Festive Season on
Mobile



An Emerging Young Population

29.7

is the median age of
Indonesians in 2021^[1]

A Giving Community

74%

of Indonesians will be making
purchases for their family this
Ramadan

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Shifting Priorities During a Different Ramadan

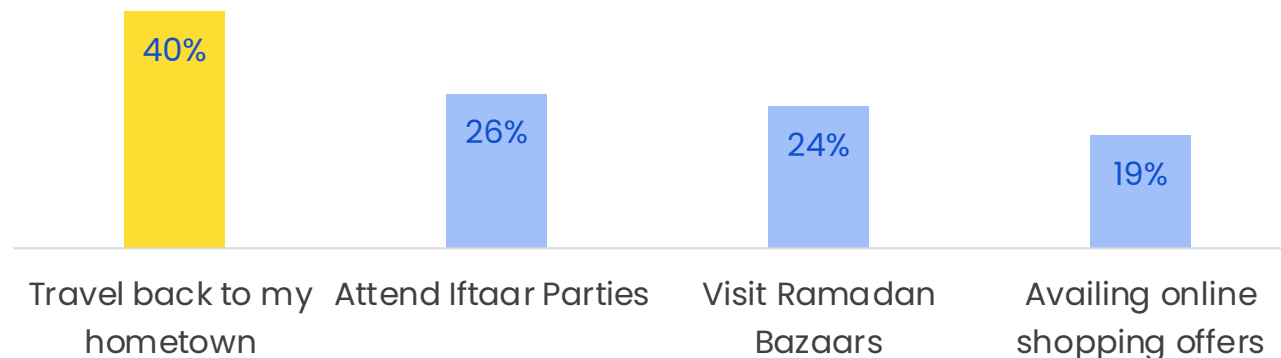


2021 : A Family-first Ramadan

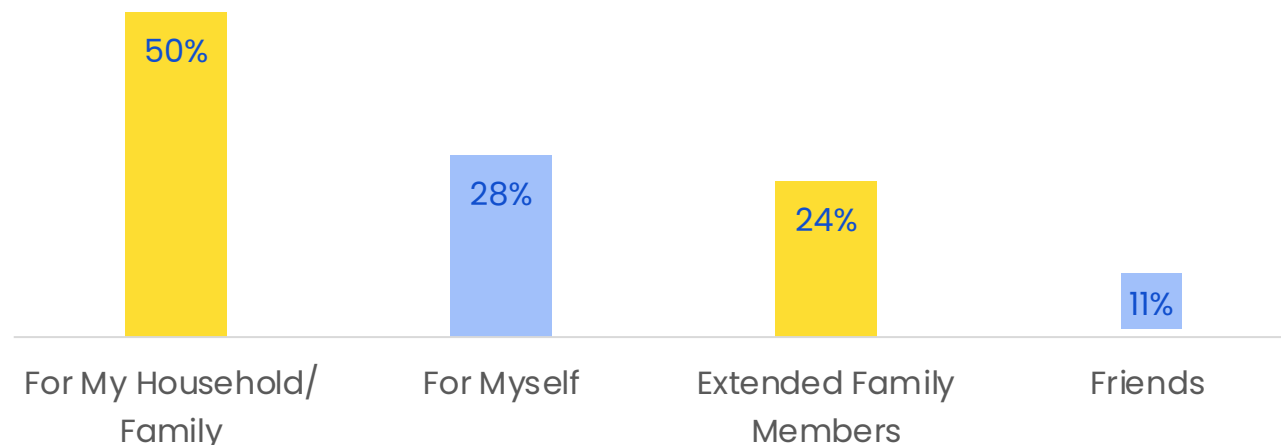
With lockdowns coming into effect just before Ramadan in 2020, Mudik Travel was not possible. However, with vaccination drives starting in mid-January, Indonesians are hopeful that they will be able to travel home this Ramadan.

Women, especially those who oversee households, are excited to visit Ramadan bazaars while men are excited to reconnect with their social circles as they look forward to attending Iftar parties.

What are Indonesians most looking forward to this Ramadan?



Who will Indonesians shop for this Ramadan?





**Consumer spending is
set to return this
Festive Season**

What are Indonesians Planning to Buy in 2021?

Groceries



38%

Clothing



43%

Gift Packages



15%

Where will Indonesians learn about Festive offers from?

Mobile



53%

Social Circles



23%

TV



16%

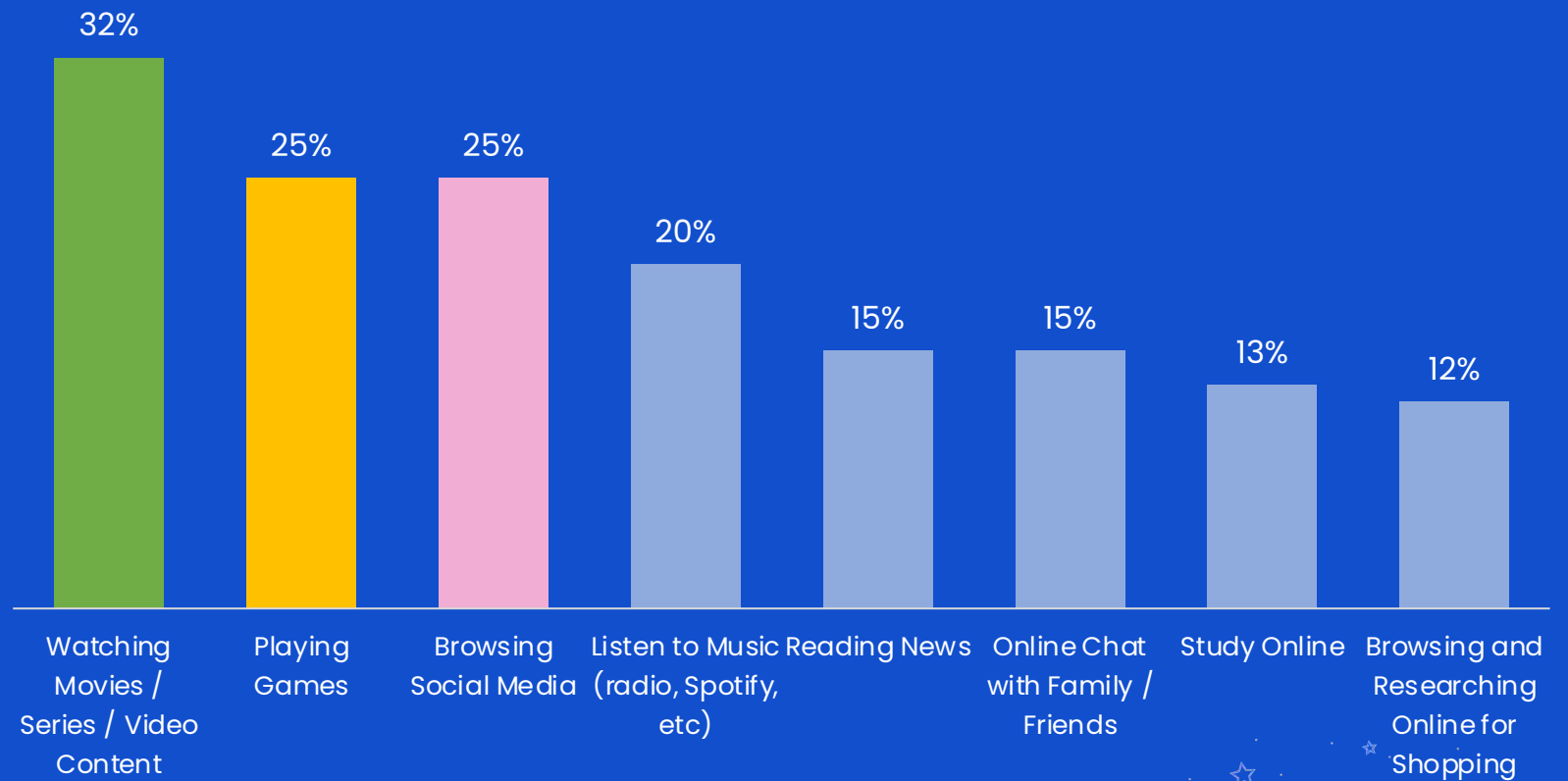
Physical Stores



9%

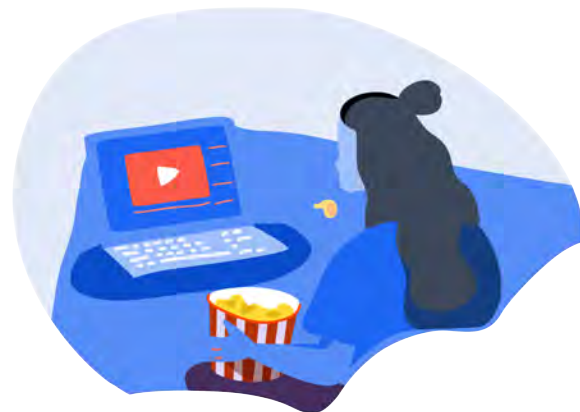
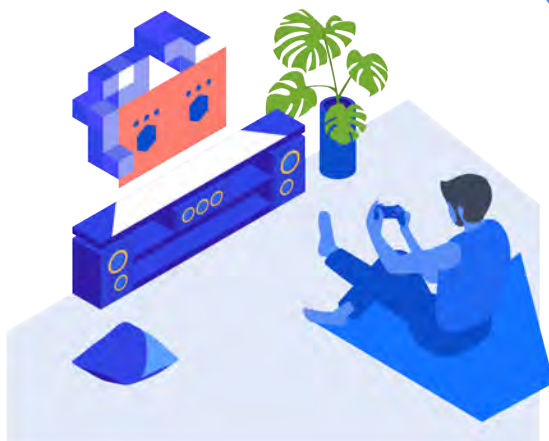
How will Indonesians spend their time as they fast?

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Watching **Videos and Gaming** stand out as the favorite activity of Indonesians during Ramadan

Top Activity
for Women
**Watching
Movies**



Top Activity
for Men
**Playing
Games**



14-44

Top Activity
for ages 14-44
**Watching
Movies**



45-54

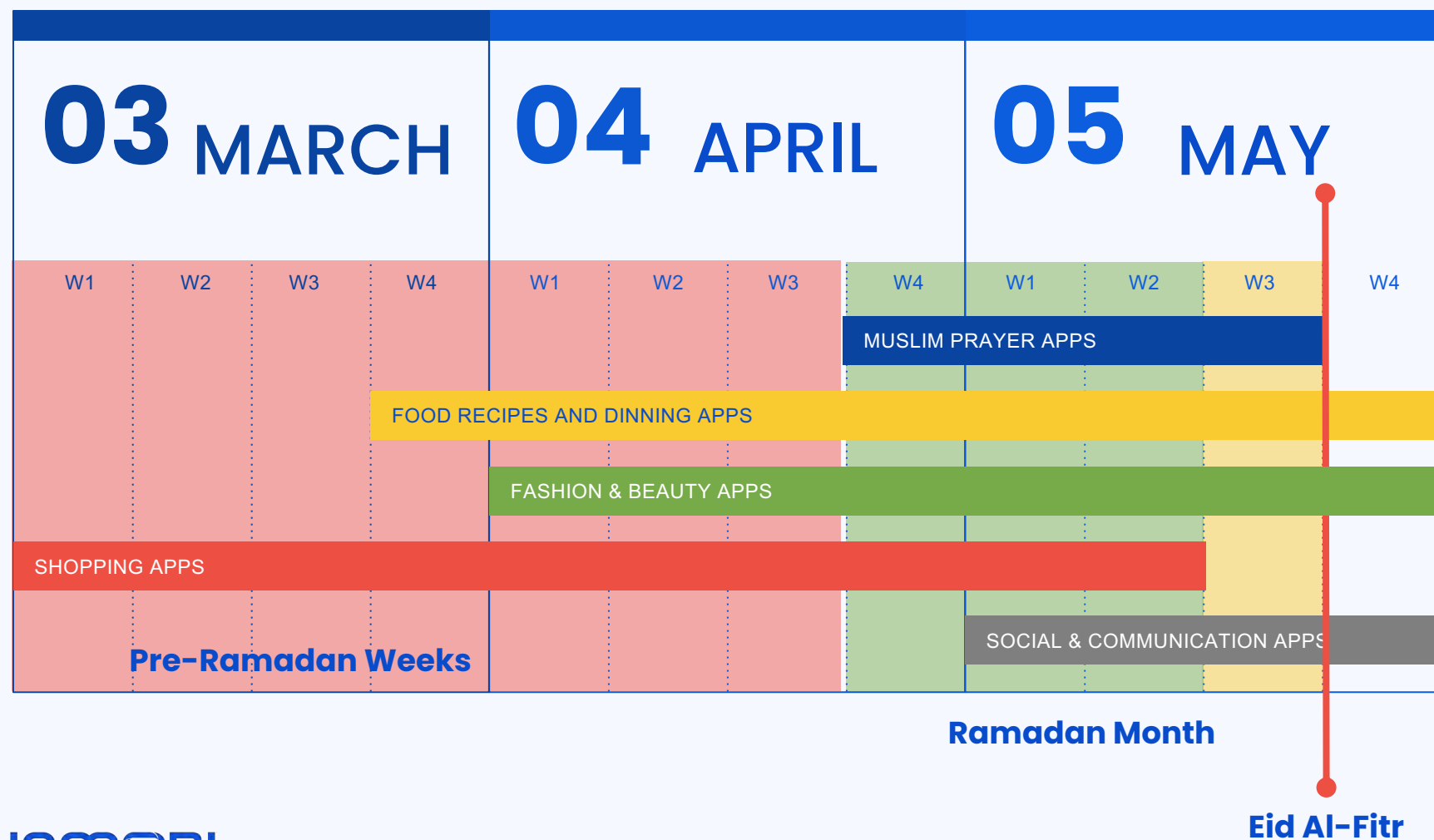
Top Activity
for ages 45-54
**Reading
News**








55+

Top Activity
for ages 55+
**Online
Shopping**

App usage peaks right before Ramadan



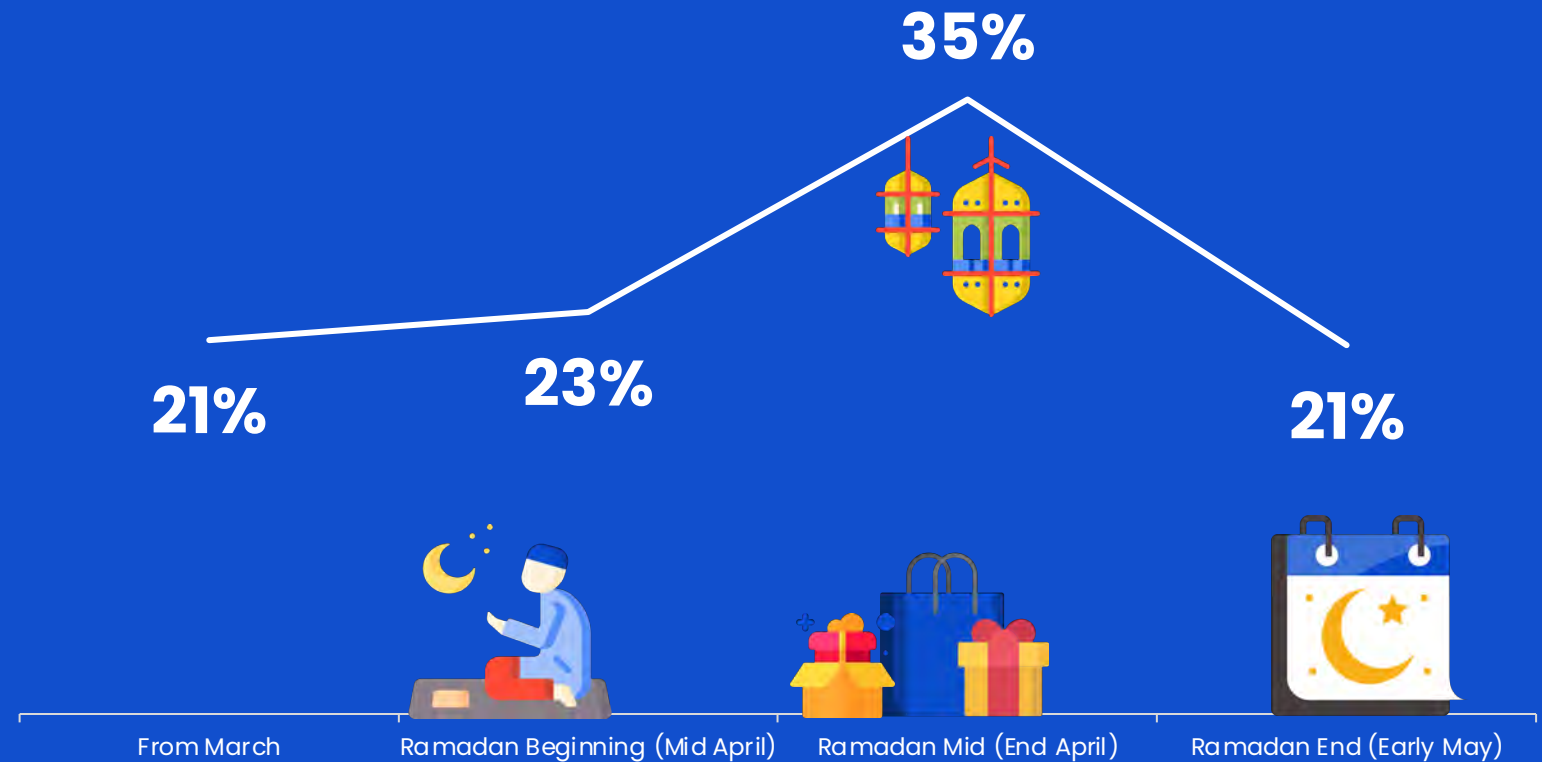
-  Shopping **↑ 82%**
-  Entertainment **↑ 67%**
-  Gaming **↑ 45%**
-  Social Networking **↑ 19%**
-  Religious & Lifestyle **↑ 69%**

The dominance of the impulsive Indonesian shopper

A whopping **79%** of Indonesians plan to make purchases **only during the month of Ramadan**.

This is a dramatic shift from 2020, where only 33% chose to buy during Ramadan, while others planned their purchases well in advance.

When are Indonesians planning to shop for Ramadan?



The Impulsive Shopper

The Planned Shopper

82%

of **women** have **not planned** their purchases making them significantly more impulsive shoppers than men this year

57%

have **not decided** on products or categories they will be buying from in 2021

62%

of **millennials** are **yet to decide** on which brands or products will they be shopping for in 2021

35%

of Indonesians **married couples without kids** will start shopping when Ramadan begins, making them **the most planned demographic**

36%

of planned **shoppers have decided** on the product or categories they will be buying from in 2021

17%

of planned **shoppers will decide** based on product offers and discounts





COVID-19 Impact on Ramadan Rush

**Some Indonesians
are hopeful of
visiting stores this
year despite the
pandemic**



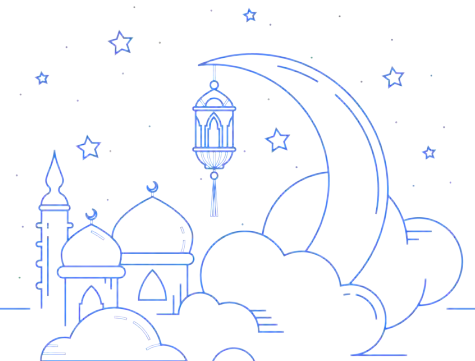
24% will go in-store to
browse but
will buy online



47% of Women
share strict social
distancing measure is
most crucial factor



33% of Indonesians
considers sanitisation as
most critical factor



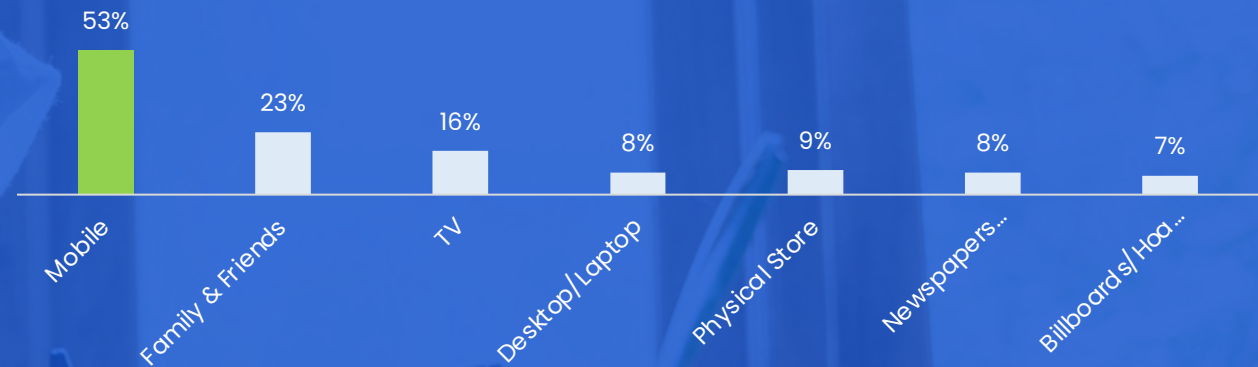


Mobile to Learn

Indonesia has been a mobile-first nation, having jumped over the desktop trend. Smartphones are the anchor for many Indonesians in their daily lives. This is reflected in their shopping plans for 2021, with mobile emerging as the primary source for information over all other channels. In fact, only 6% of millennials rely on television to learn about festive offers.

61% of women use mobile to discover products/services while 58% of families with children rely on their smartphones for the same.

Where will Indonesians learn about festive season sales and offers in 2021?



Mobile grows as the most preferred medium of discovery in 2021



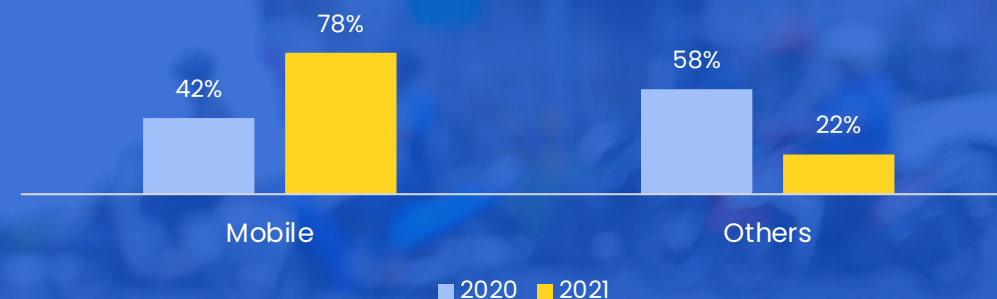


Mobile to Explore

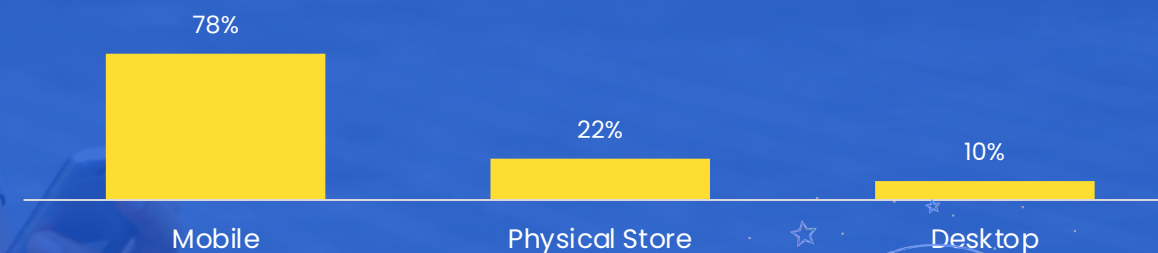
While Indonesia has always been a mobile first one nation, the reliance on smartphones as an anchor in the day to day lives of individuals has only further been catapulted due to the pandemic.

There has been a phenomenal growth of 84% in mobile as a channel to explore making it the medium of choice by a long way especially when compared to other sources including in-store and desktops.

Mobile emerges as the most preferred source for exploration in 2021



Indonesians' most preferred channel to research and explore





Mobile to Buy



67%
of women count smartphones as
their preferred channel for shopping



71%
of millennials look at smartphones as
the medium that will fulfill all their
buying needs this Ramadan

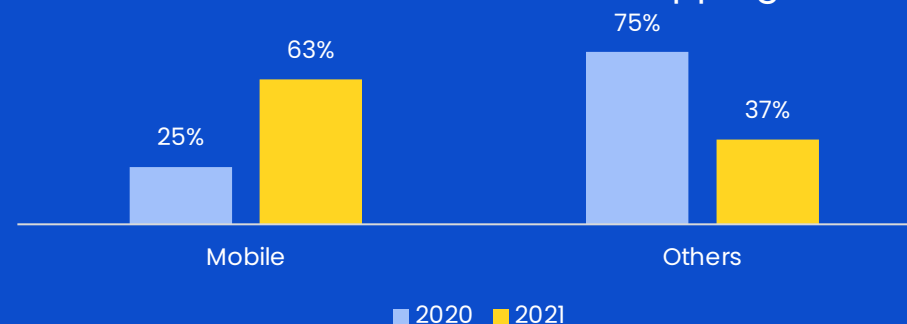


63%
of married Indonesians with children
will buy on Mobile

Indonesians' most preferred buying channel



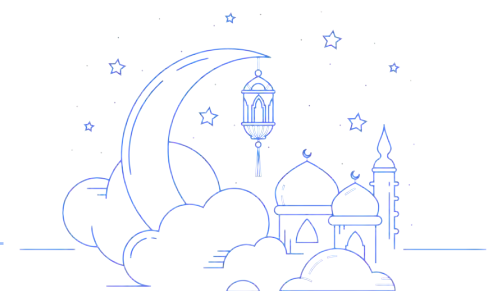
Mobile Dominates 2021 Shopping



The InMobi View on 2021 Ramadan

The onset of the pandemic has changed consumer behaviour definitively across the globe. While some of these changes may not be new, the lockdowns have only further accelerated adoption of shifting behaviour. A transformation largely anchored by smartphones, this change is especially pronounced in the mobile-first economy of Indonesia.

This year, Indonesians are hopeful despite the difficulties they faced in 2020. They are excited to reunite with their families and spend significantly on them despite reduced incomes. While some Indonesians are hoping to go back into retail stores, mobile will continue to be the device where they learn about new products and services, explore their options in the market and make their final purchases.



What brands need to remember in #TheNewNormal

Consumer Sentiment Rebounds



Despite a tough 2020, Indonesians are excited for Ramadan in 2021

Understand Changing Behavior



Consumers are price conscious and unplanned now more than ever!

Invest in the Mobile Universe



Users are researching, exploring and buying on their smartphones!



InMobi Marketing Cloud



Interested in learning more?
Write to us at
mobilemarketing@inmobi.com

Powered by
Mobile Intelligence

Transparent

Always On

Integrated

