Think with Google

Winning Ramadan

with Digital 2022
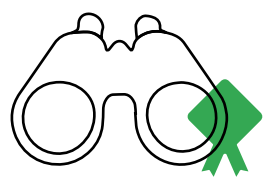
Playbook

Contents
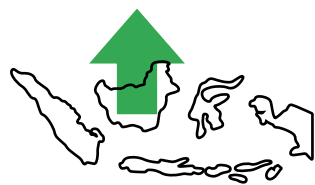
1 Indonesia's Evolving Landscape

Online is no longer a one-off phenomenon, it's a way of life

21M
New digital consumers
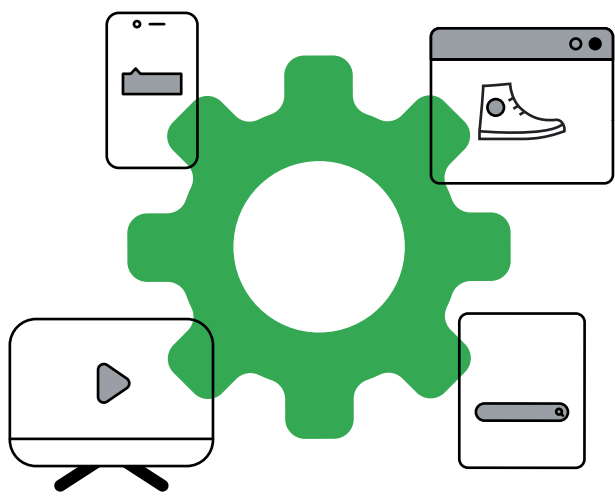
72% Non-metro   **28%** Metro

There are more digital users now than ever
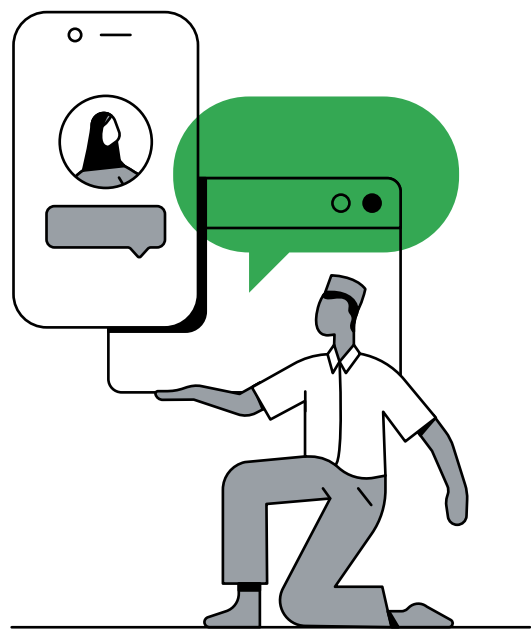
Of these new digital users, 72% come from non-metro areas - indicating that the digital penetration has now expanded across Indonesia

99% of new digital consumers intend to continue using digital services going forward

Source: Google, Temasek and Bain, e-Conomy SEA 2021

3

2 Learnings from Ramadan 2021
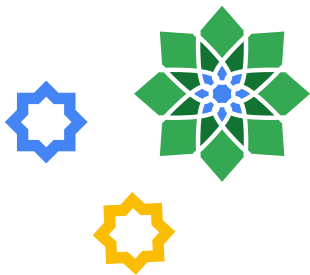
The boundaries between **offline** and **online** continue to blur, **creating an omnichannel reality**

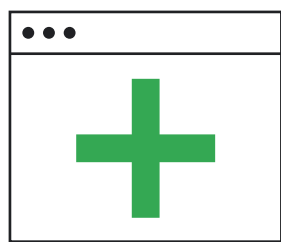## In Ramadan 2021, online became the preferred shopping channels for shopping

Shopping channel selected among Indonesians during Ramadan 2021

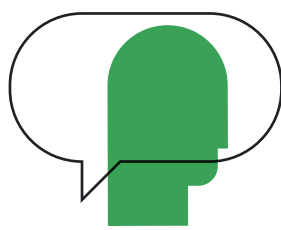|	
Online Marketplaces	**90%**
Multi-purpose Apps	**78%**
Supermarkets	**75%**
Local Market Stalls	**65%**
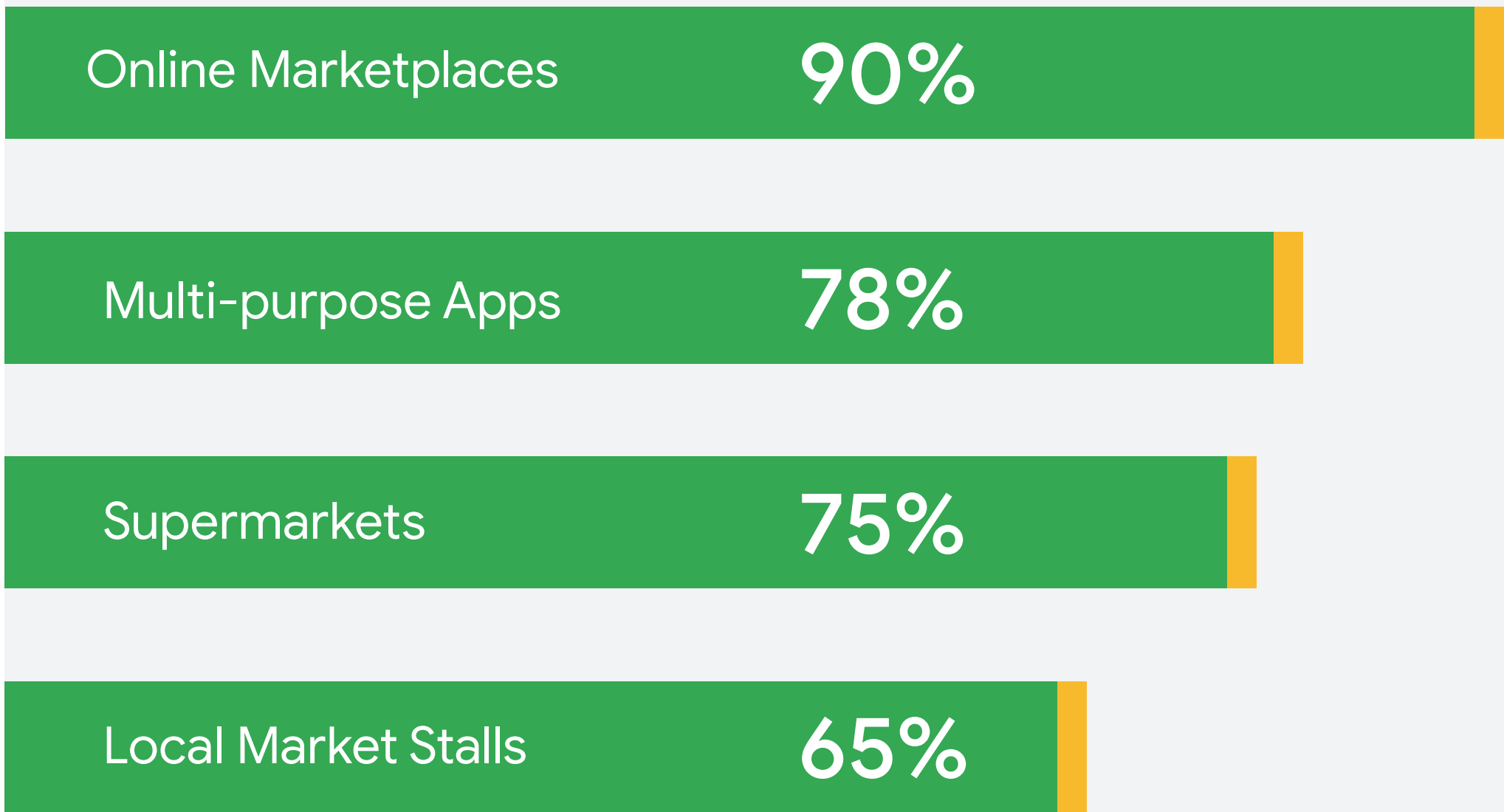
Throughout 2021, there has been a rise of the digital merchant, embracing digital services end-to-end

1 in 3

believe that they would **not have survived the pandemic** if not for digital platforms

~2

average number of digital platforms used to access consumer demand online

Digital tools

% of digital merchants likely to increase or maintain usage of digital tools over the next 5 years

Legend:
- 🟩 Likely to increase usage
- 🟧 Likely to maintain same usage

	Digital marketing	Website services	Digital analytics	Operation software	Cloud storage	Collaboration software
Total	91%	71%	69%	78%	71%	64%
Likely to increase usage	69%	45%	43%	49%	44%	38%
Likely to maintain same usage	21%	26%	26%	28%	27%	25%
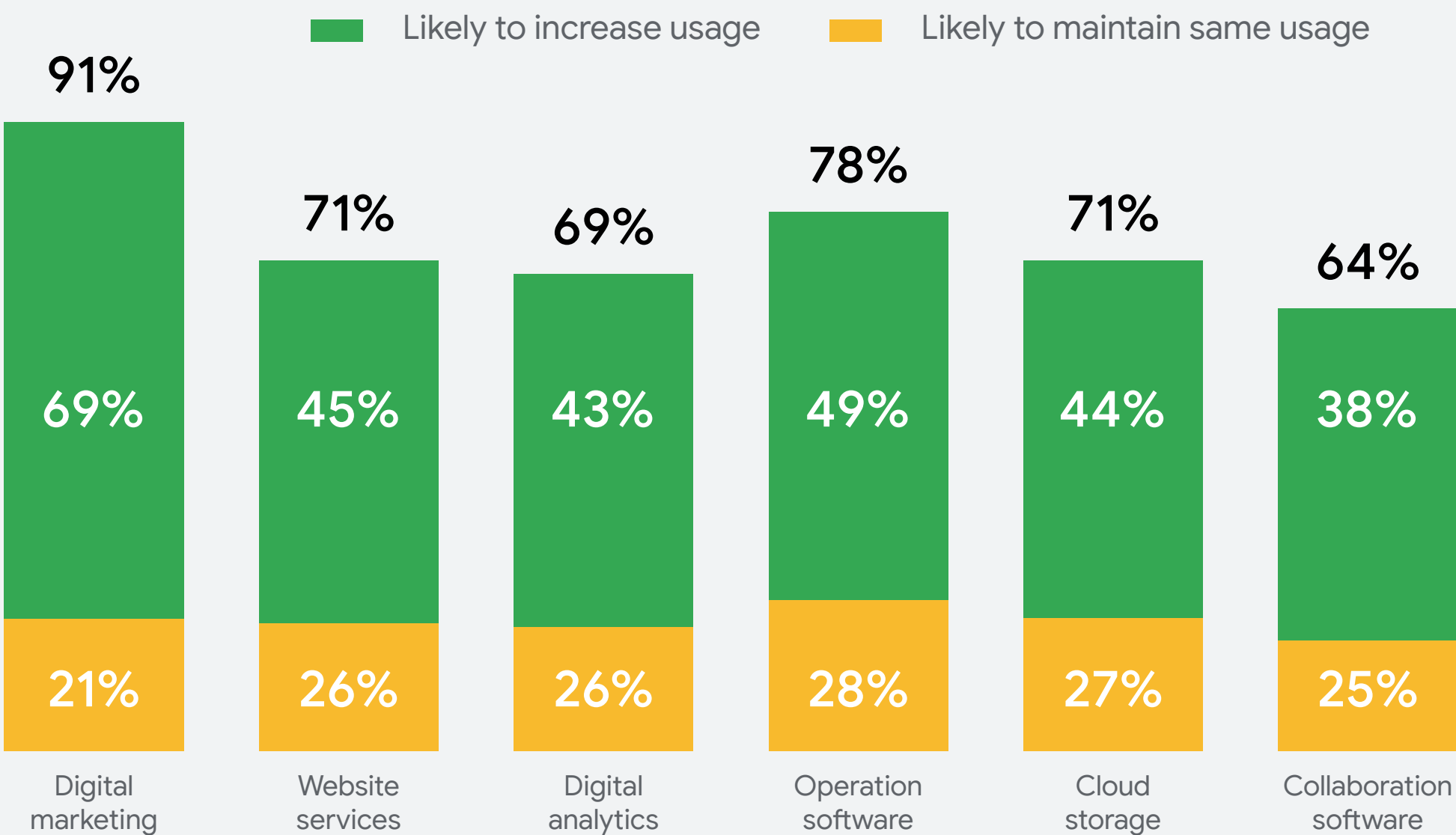
Indonesians are also watching **online videos** more to **accompany their celebrations**
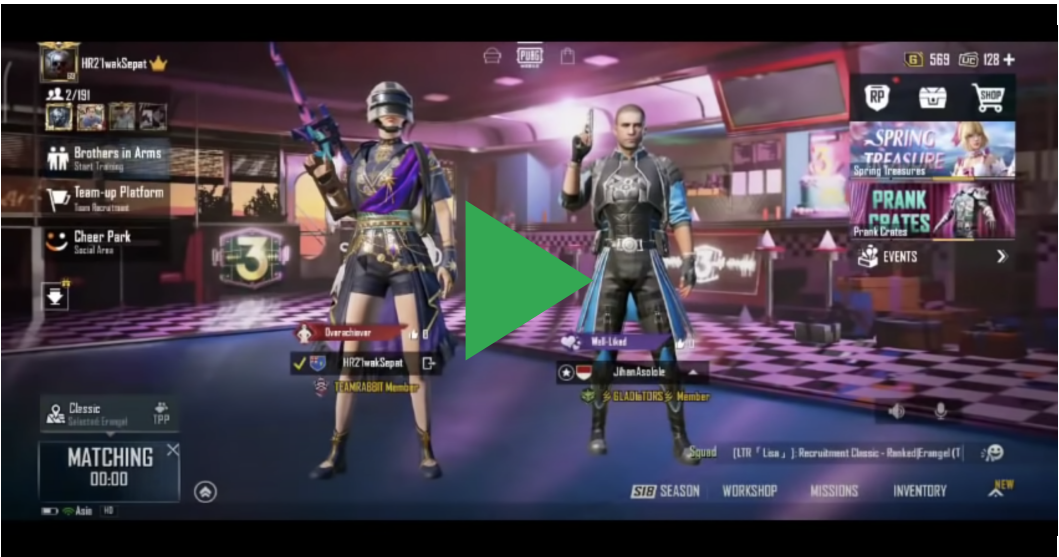
4x
higher watchtime of **'Play Together'** videos

3x
higher watchtime of **'Ramadan'** videos

3x
higher watchtime of **'Munggahan'** videos

With blurred lines between online and offline, how do brands thrive entering the omnichannel reality?
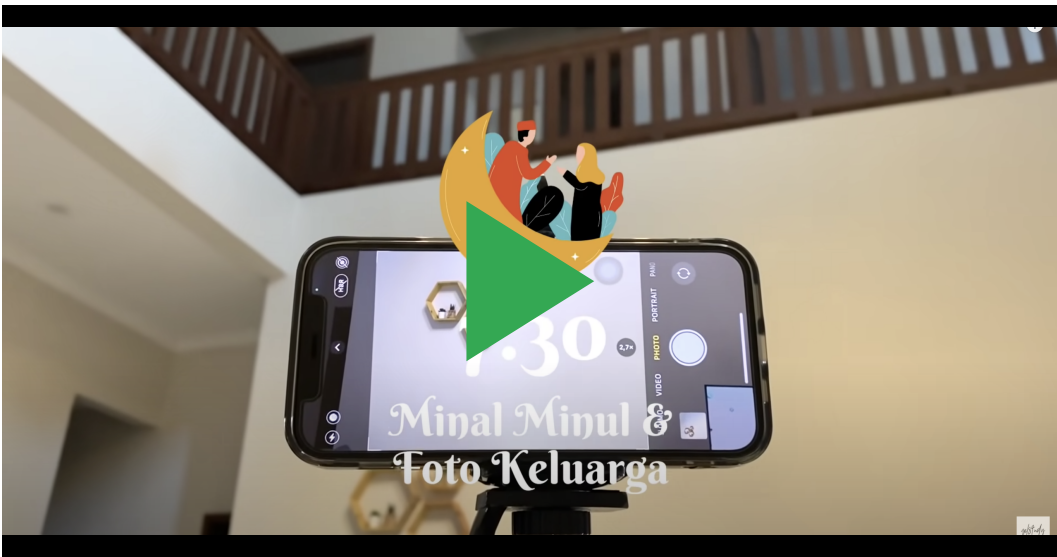
3 2022 Ramadan Planning

1. Build a strong online presence to aid people in their purchase journey

Online presence helps reach consumers who are **willing to extend their basket size**
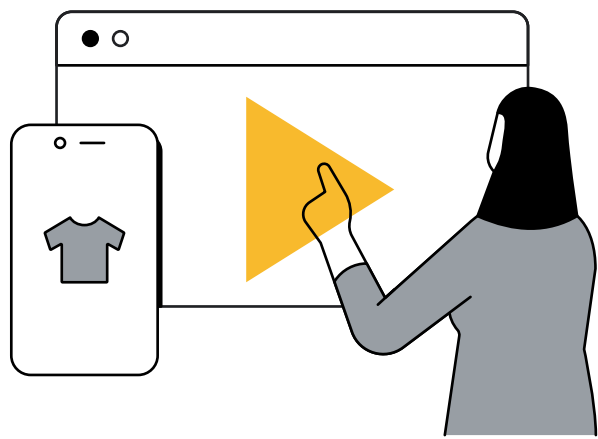
YouTube users spend 34% higher than non-internet users

YouTube helps drive 89% offline sales
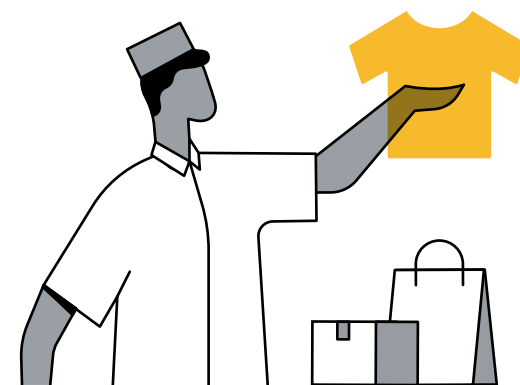
Search also becomes a **'hub'** that connects **consumers to more information**

73% consumers use search engines to access one or more touch points (e.g., ecommerce, brand websites)

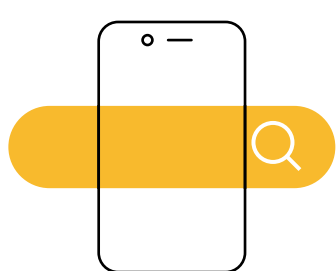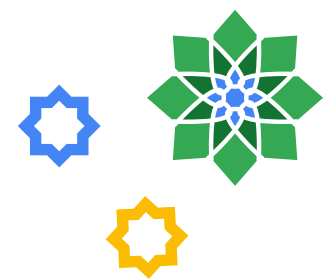# To help consumers in their purchase journey, brands should pay attention to when consumers start searching

🟩 Search rises   🔍 Intense search 2021

	Pre-Ramadan				Ramadan				Lebaran	Post-Lebaran	
	-4 wks	-3 wks	-2 wks	-1 wks	Wk1	Wk2	Wk3	Wk4		+1 wks	+2 wks
Fasting related products / "good for me during fasting" (dairy,juice, tea, breakfast food, staple food, water)											
Lebaran related products - for togetherness or gifting (baked goods, snack & confectionery, soft drinks)											
Lebaran related products - for appearance (apparel & fashion, make up, haircare, home improvement)											
THR & money-giving tradition related products (game voucher, mobile phone)											
Telco trends		Internet quota plans								Pre-paid packages	

Effective Ramadan Media Planning Recommendation

Marketing Objective	Media Strategy	Product Solutions	Platform	Recommended Assets	Recommended KPI	Recommended Targeting	Budget Allocation	
							Awareness Focus	Performance Focus
Achieving high reach and frequency to gain high consumer awareness	Digital take over (Google Blast)	CPM Masthead	YouTube	Skippable Video (15s – 60s)	80% Reach of Target Audience with 4+ frequency during Ramadan Period	All Demography	50%	20%
		YouTube Roadblock	YouTube	Unskippable Video, Skippable Video, and Bumper Video		Top Channels (Diamond / Gold) or Top Category Channels (eg. Auto, Gadget, Beauty)		
		Video Reach Campaign	YouTube	Unskippable Video, Skippable Video, and Bumper Video		Affinity Audiences, Custom-Intent Audiences, and In-Market Audiences		
		Discovery Campaign	Display, Google Feed, Gmail	Display Ads				
		TruView Discovery	YouTube	Unskippable Video (15s – 60s)				
Building product / brand favorability by personalizing our communication to many potential audiences	Audience Personalization	Dynamic Display Creative	Display	Display Ads	Product Favorability and Purchase Intent Lift in BLS	Custom Intent Audience, First Party Audience, In-Market Audience, Ramarketing Audience	30%	20%
		Directors Mix	Skippable Video (15s – 60s)	Unskippable Video, Skippable Video, and Bumper Video				
Converting high intenders to generate leads / online sales	Capturing digital intentions	Search Engine Marketing	Search	Responsive Search Ads with >4 Extensions	80% Branded Keywords Coverage	Brand Keywords, and Generic Keywords	20%	60%
		Performance Max	Search, YouTube, Display, Google Feed, Gmail	Text Ads, Display Ads, and Skippable Video (15s – 60s)		Custom Intent Audience, First Party Audience, In-Market Audience, Ramarketing Audience		
		Smart Shopping Campaign	Seach, Display & YouTube	Landscape image, HTMLs display ads, Videos (30s or less) and Google Merchant Center (GMC) Feeds		Affinity Audiences, Custom-Intent Audiences, and In-Market Audiences		
Converting high intenders to become loyal users of App Services		App Campaign (formerly known as Universal App Campaign)	Search, YouTube, Display, Google Feed, Gmail	Text, Display, and Video (Portrait, Square, Landscape) Assets	Efficient Cost Per Install and Cost Per Action	All Demography		
		App Campaign Engagement for (ACe)						

Disclaimer: The table is indicative for recommendation only, actual planning will vary case by case

2. Create personalized video content to appeal to local audiences

Expansion to non-metro will be the engine for growth as bigger proportion of new internet users come from this region

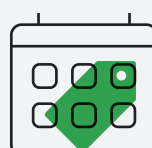## 72% of the new internet users are from non-metro cities

Did you know..?

E-commerce transactions for FMCG products in non-metro areas grew by 214%

51% of internet users in non-metro cities will switch to another brand during Ramadan if the brand they usually use does not offer delivery

The frequency of consumer spending in non-metro areas is higher on weekends than on weekdays

For the use of ride-hailing and food delivery apps during Ramadan, we see an increase on weekdays for consumers in non-metro, and on weekends for consumers in metro, compared to non-Ramadan periods
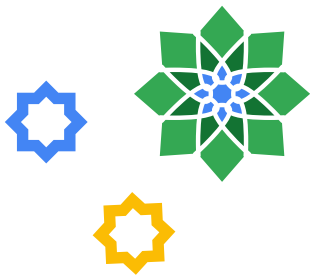
Success story
Indosat
Ramadan 2021

Indosat learned that people love listening to music as they wait to break fast or spend time with their family during Ramadan. Wanting customers to stay connected with their loved ones, Indosat offered a Freedom Internet Package from the beginning of the fasting period all the way until Ramadan. And to play a meaningful role for users during Ramadan, they collaborated with popular local musicians and created a series of musical videos, hosted exclusive virtual concerts on YouTube, and even reached out to new users and re-targeted engaged customers through Google Display & Video 360
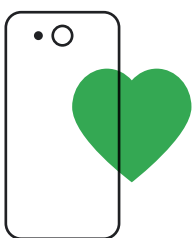
Results
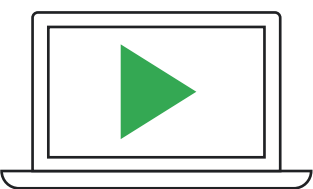
145M
views on Youtube
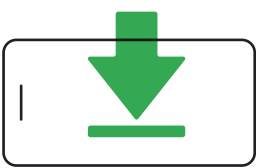
550,000
new app installs
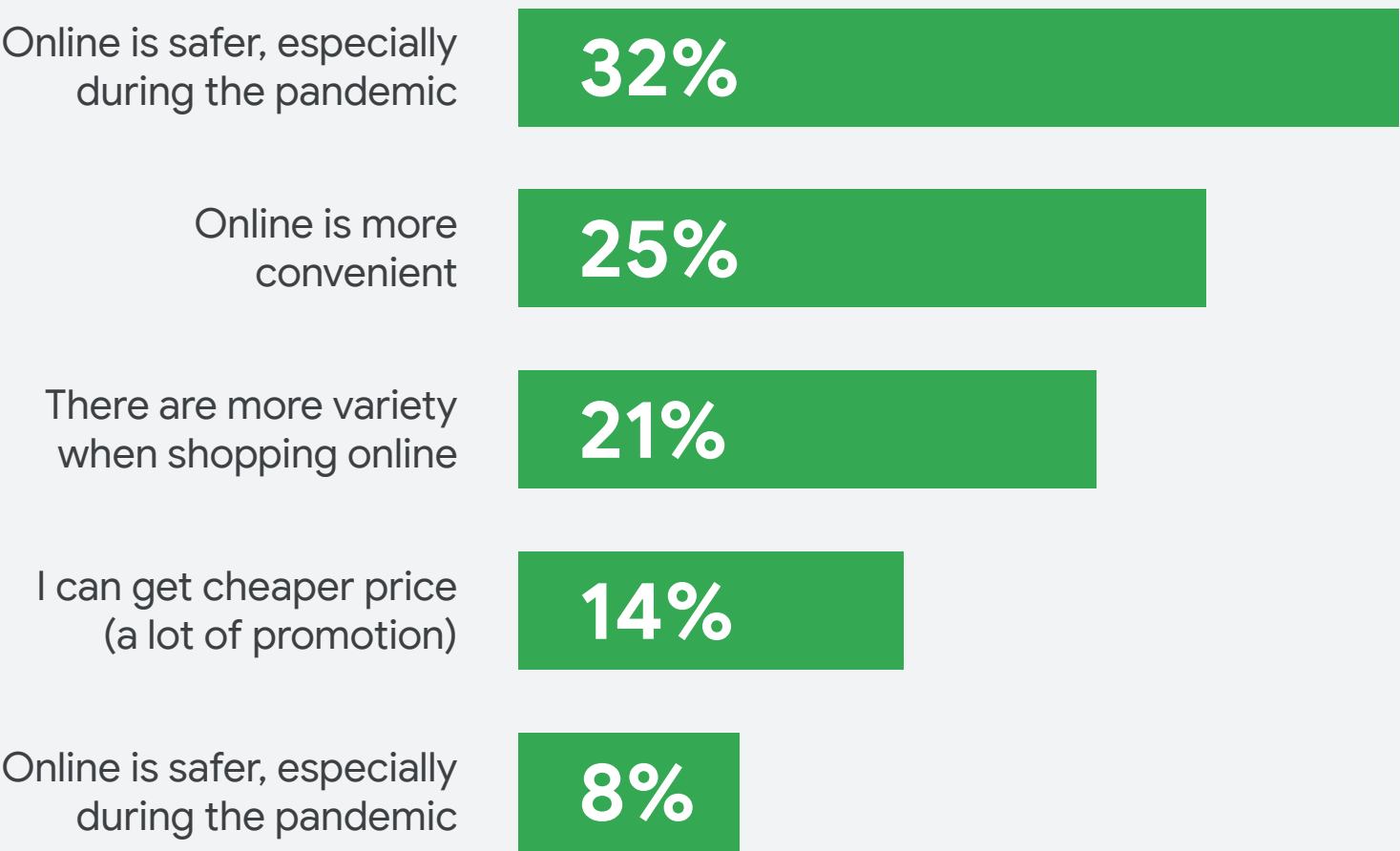
5.7M
app-opens during Ramadan

Takeaway for brands

- Brands should lean into hyperlocal marketing using online video during the holy month as 70% of Indonesians watch more video content during Ramadan compared with non-festive periods

- Brands can work with YouTube content creators to produce content that appeals to diverse audiences and engage with consumers across different regions more deeply
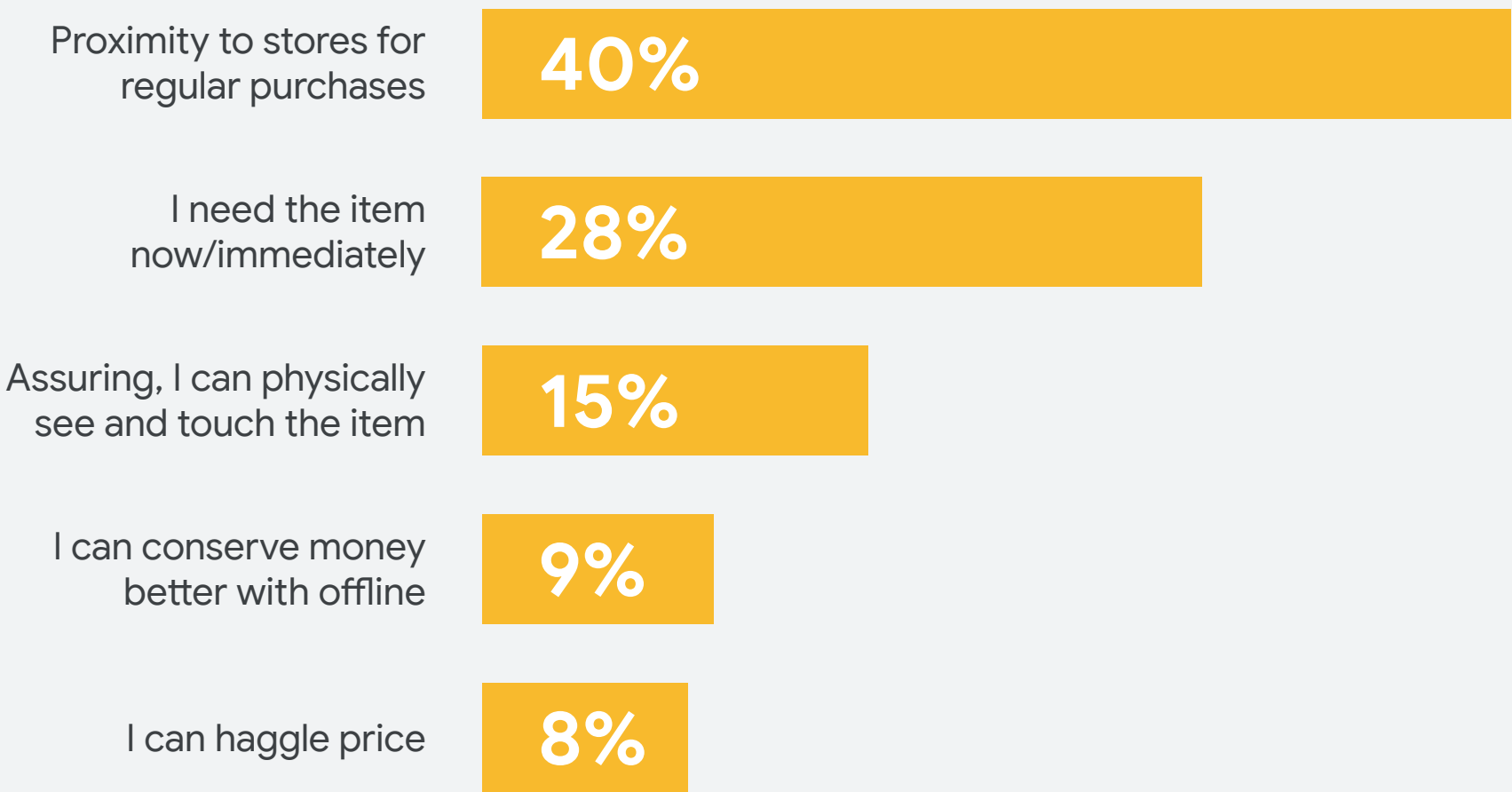
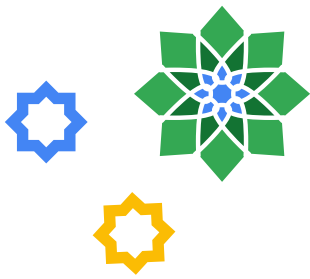# 3. Provide a seamless online-offline experience

Having presence in both online & offline is important as Indonesians shop at each channel for different reasons

Top 5 reasons for Online Purchase

Reason	Percentage
Online is safer, especially during the pandemic	**32%**
Online is more convenient	**25%**
There are more variety when shopping online	**21%**
I can get cheaper price (a lot of promotion)	**14%**
Online is safer, especially during the pandemic	**8%**

Top 5 reasons for Offline Purchase

| Reason	Percentage
Proximity to stores for regular purchases	**40%**
I need the item now/immediately	**28%**
Assuring, I can physically see and touch the item	**15%**
I can conserve money better with offline	**9%**
I can haggle price	**8%**

Success story
Indomie
Ramadan 2021

To be respectful to people during the fasting season, Indomie, a popular instant noodle brand, did the unthinkable by removing the image of its famous noodle from its packaging and all digital assets so as to not tempt fasting shoppers. Online, two different versions of ads ran. The one during the fasting period featured empty bowls, while the one which ran afterwards, showcased the much-loved noodles. This was made possible on YouTube by using time-targeting bumper ads that automatically hid images of the Indomie Noodles
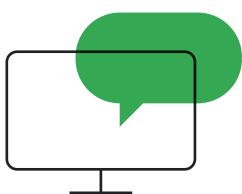
Results
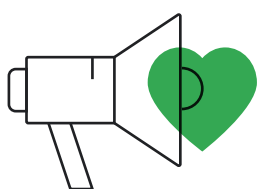
266%
lift in impression

Helped the brand achieve **increased sales** both online and offline

One of the **most talked about** social media campaigns during Ramadan

Takeaway for brands

■ Brands that establish a solid omnichannel presence, as well as provide people with helpful and personalized content in their purchasing journey, are well poised to get ahead and maximize opportunities for growth during Ramadan

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