

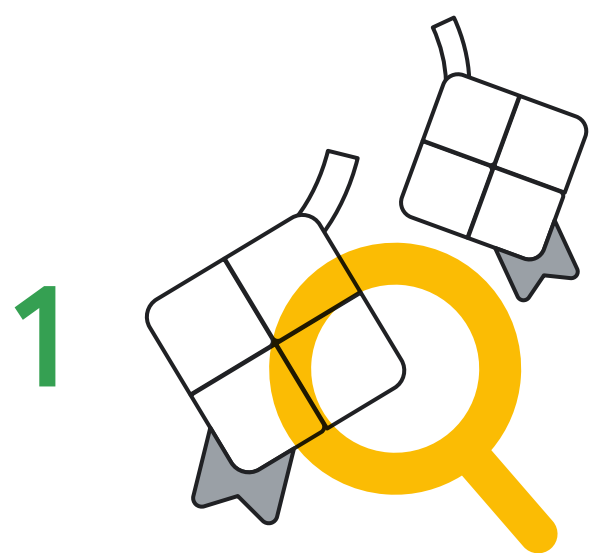
Think with Google

Navigating Ramadan with Digital 2023

Playbook



Contents



Indonesian Consumers: Then and Now

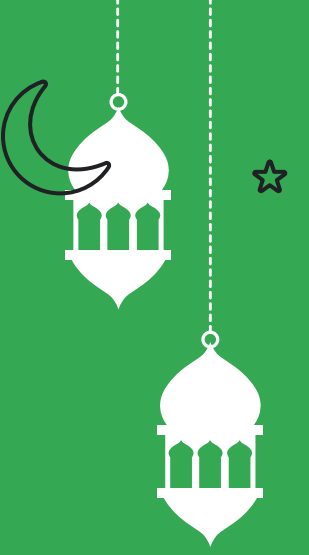


Learnings from Ramadan 2022



Ramadan 2023 Campaign Planning

1. Indonesian Consumers: Then and Now



Now, more than ever, digital continues to be adopted as the way of life for Indonesians.

Nearly 80% of Indonesians intend to increase or maintain their usage of digital services across sectors in the next 12 months.

220M

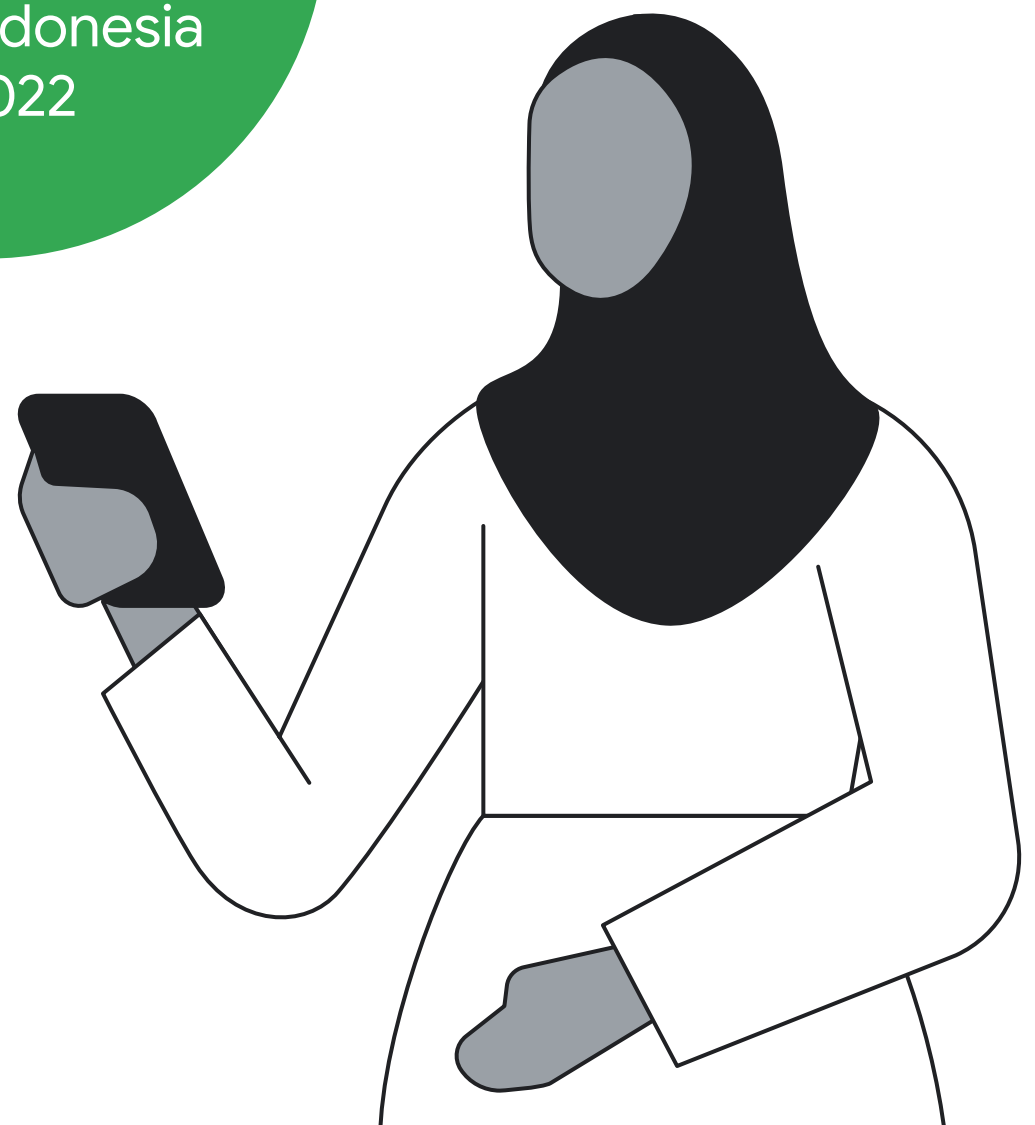
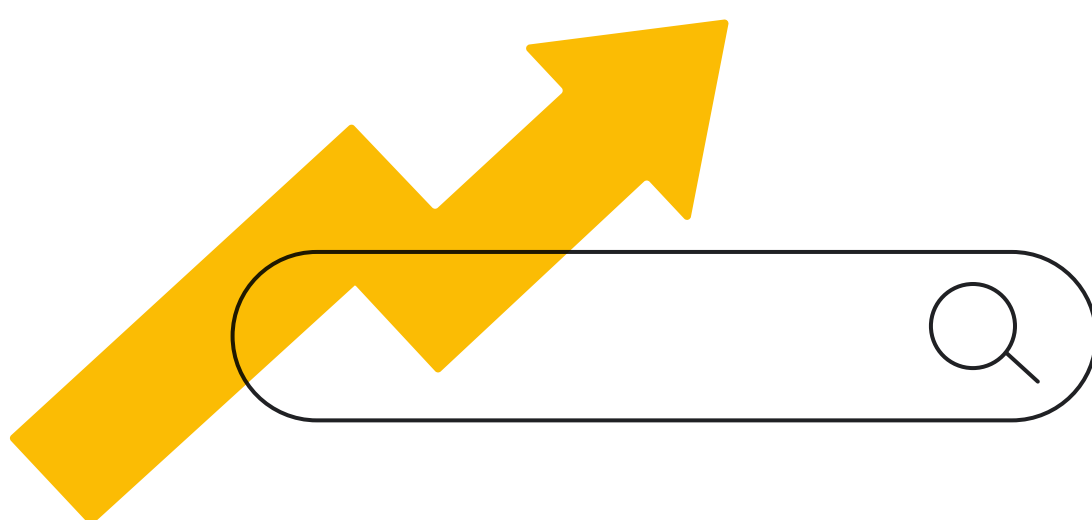
total Indonesian
internet users in 2022

35M

new internet users
since the pandemic
(2019-2022)

77%

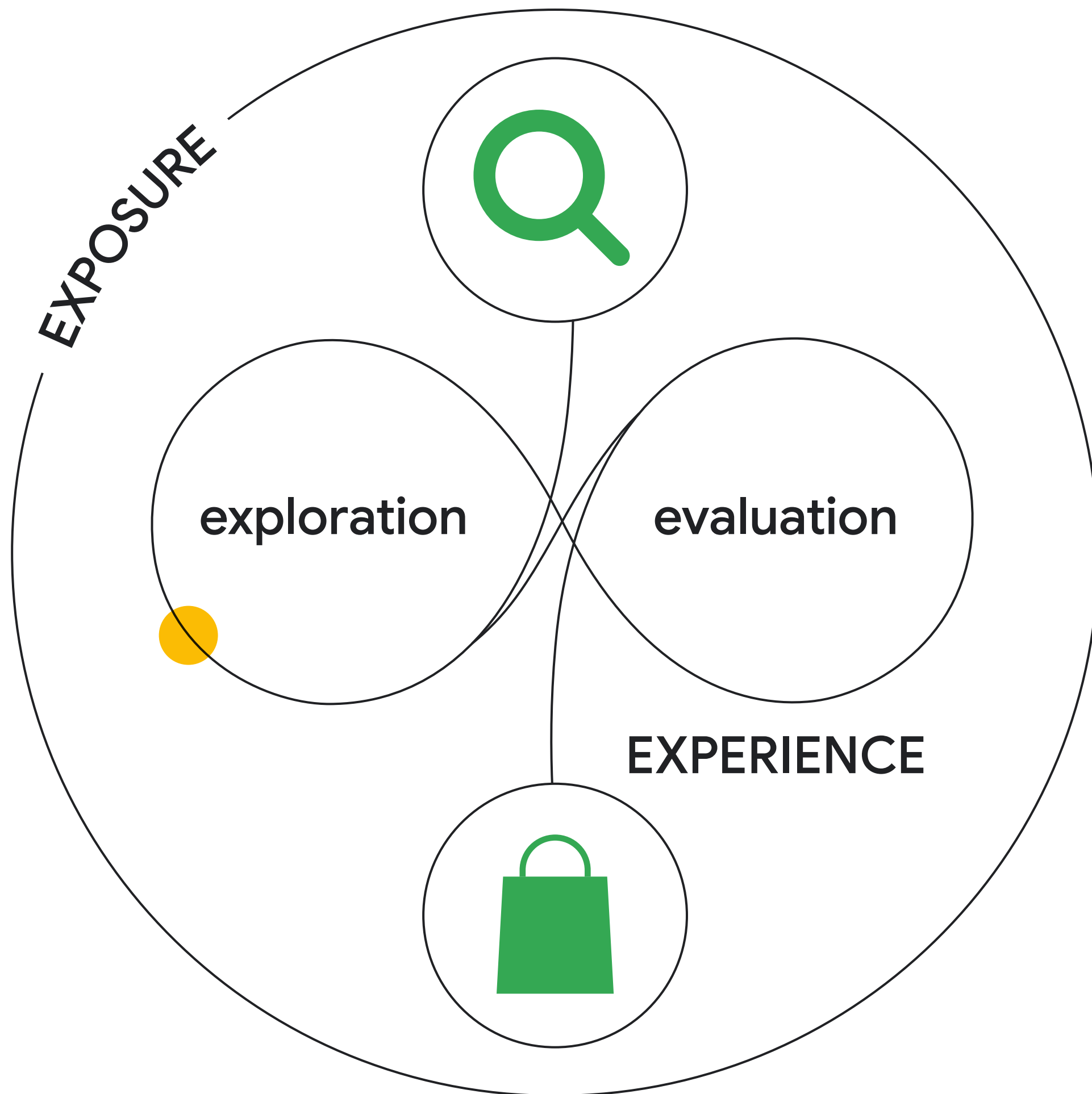
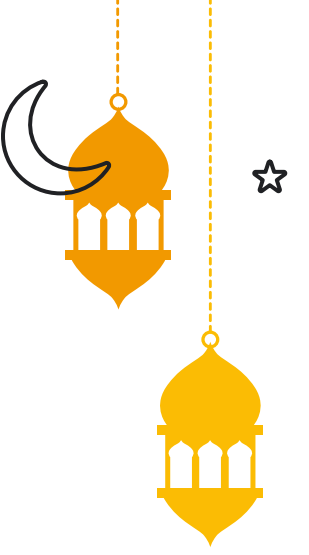
internet penetration
across Indonesia
in 2022





With online usage becoming a norm in their post-pandemic lifestyle, consumers are also digitizing their paths to purchase — impacting every stage of the brand funnel.





In light of these consumer journey evolutions, the path to purchase is no longer linear. Consumers are constantly exploring and evaluating, creating the messy middle where brands can eventually gain or lose a potential customer.

As the path to purchase becomes non-linear, how can brands navigate this messy middle and reach their consumers effectively?

2. Learnings from Ramadan 2022



When: Timely Spendings for Ramadan

Throughout the Ramadan period, Indonesians are engaging with brands and timing their purchases across multiple verticals at varying key moments.

M-1 Ramadan	Ramadan month	M+1 Ramadan
<div><div>+12%</div><div>Motor Vehicles</div></div> <div><div>+7%</div><div>Household Equipment</div></div>	<div><div>+19%</div><div>Food & Beverages</div></div> <div><div>+12%</div><div>Tech & Telco Equipment</div></div> <div><div>+28%</div><div>Clothing & Miscellaneous Goods</div></div>	<div><div>+12%</div><div>Cultural & Recreation Goods</div></div>

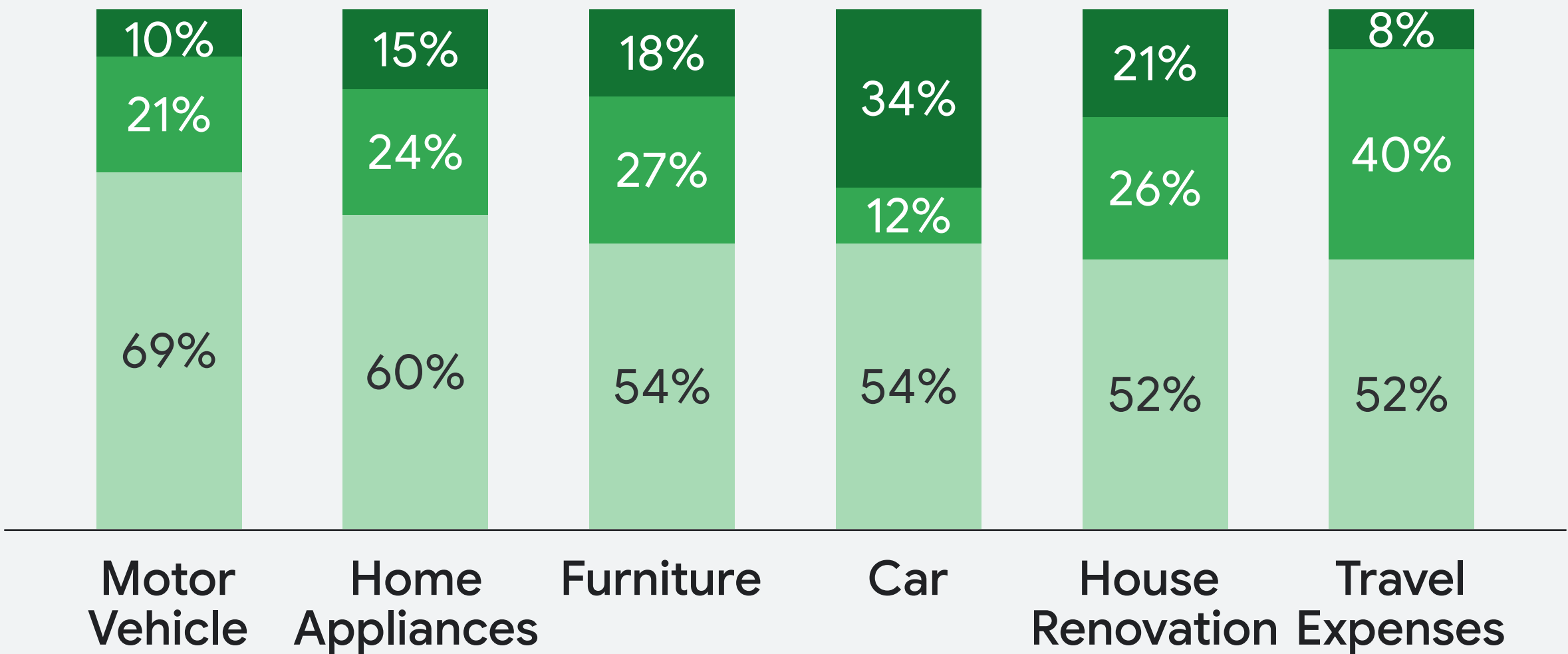




Consumers are planning ahead to make their big-ticket purchases for the festive season, even prior to their THR (Tunjangan Hari Raya) disbursement.

Purchase Period:

- before receiving THR and paid in advance using my savings/credit card/paylater
- between THR disbursement and Eid Al-Fitr
- after Eid Al-Fitr



>50%

of consumers spend on high-value items before receiving THR



~80%

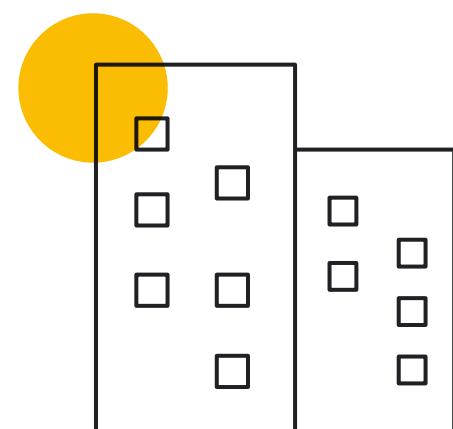
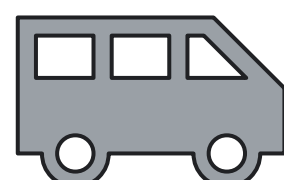
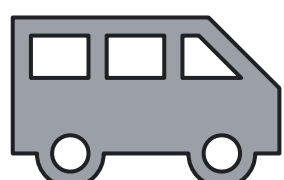
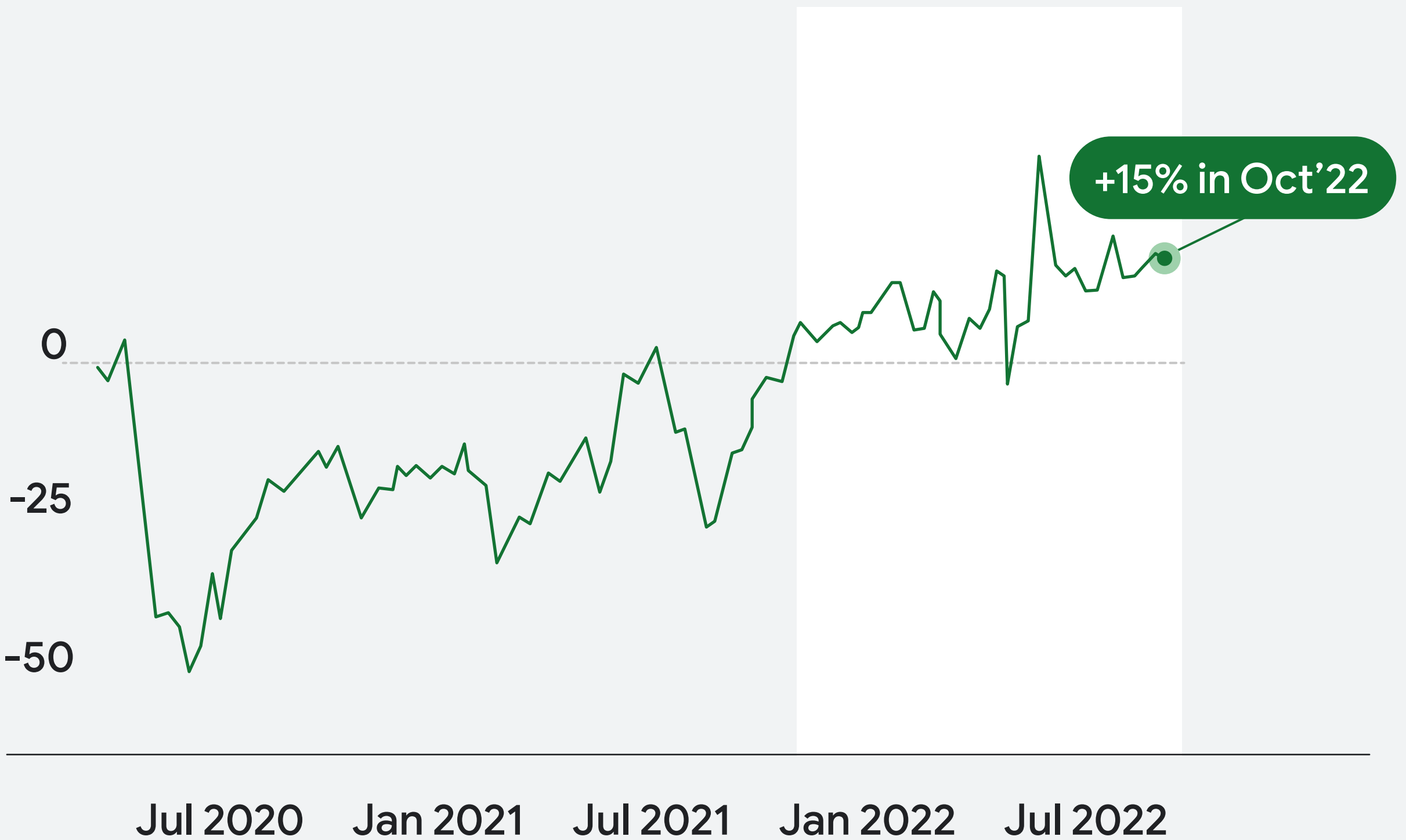
of consumers purchase before Eid Al-Fitr across all categories



Where: Return of Travel and Homecoming

Indonesians are returning to the thrill of travel and homecoming, even more so than pre-COVID levels. Since the highest mobility spike in May 2022, retail and recreational areas see a steady increase in mobility by up to 15% above the baseline.

Mobility in Retail and Recreational areas, Indonesia % change from pre-pandemic level (Jan-Feb '20)

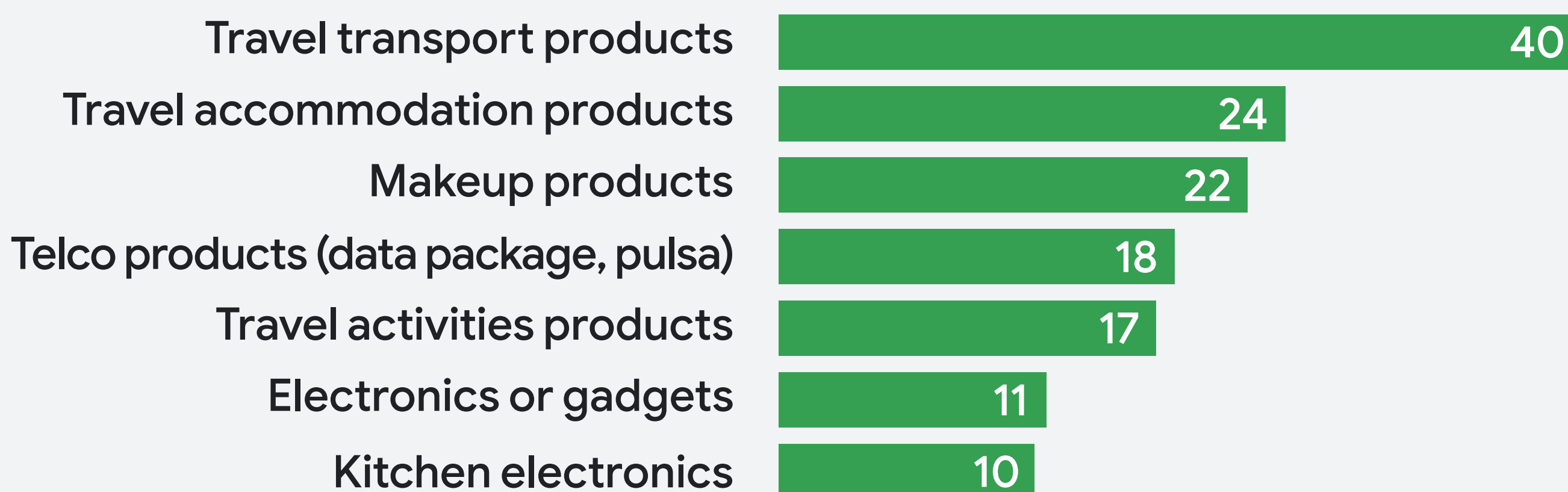




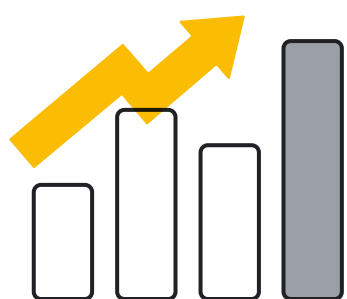
Mudik goers are finding excitement in shopping while traveling home with loved ones, disbursing spends across categories in mudik destinations.

Mudik goers are more likely to have higher purchase amount and higher spending across most categories

Categories boosted by mudik, with the point percentage difference of % respondents who purchase each category for mudik and non-mudik goers:



Travel-related products, makeup, and telco products are seeing an increase as mudik goers prepare for their trip.



2.2x

higher vs
non-mudik goers



IDR 5.2M

is the average overall
spend of mudik goers



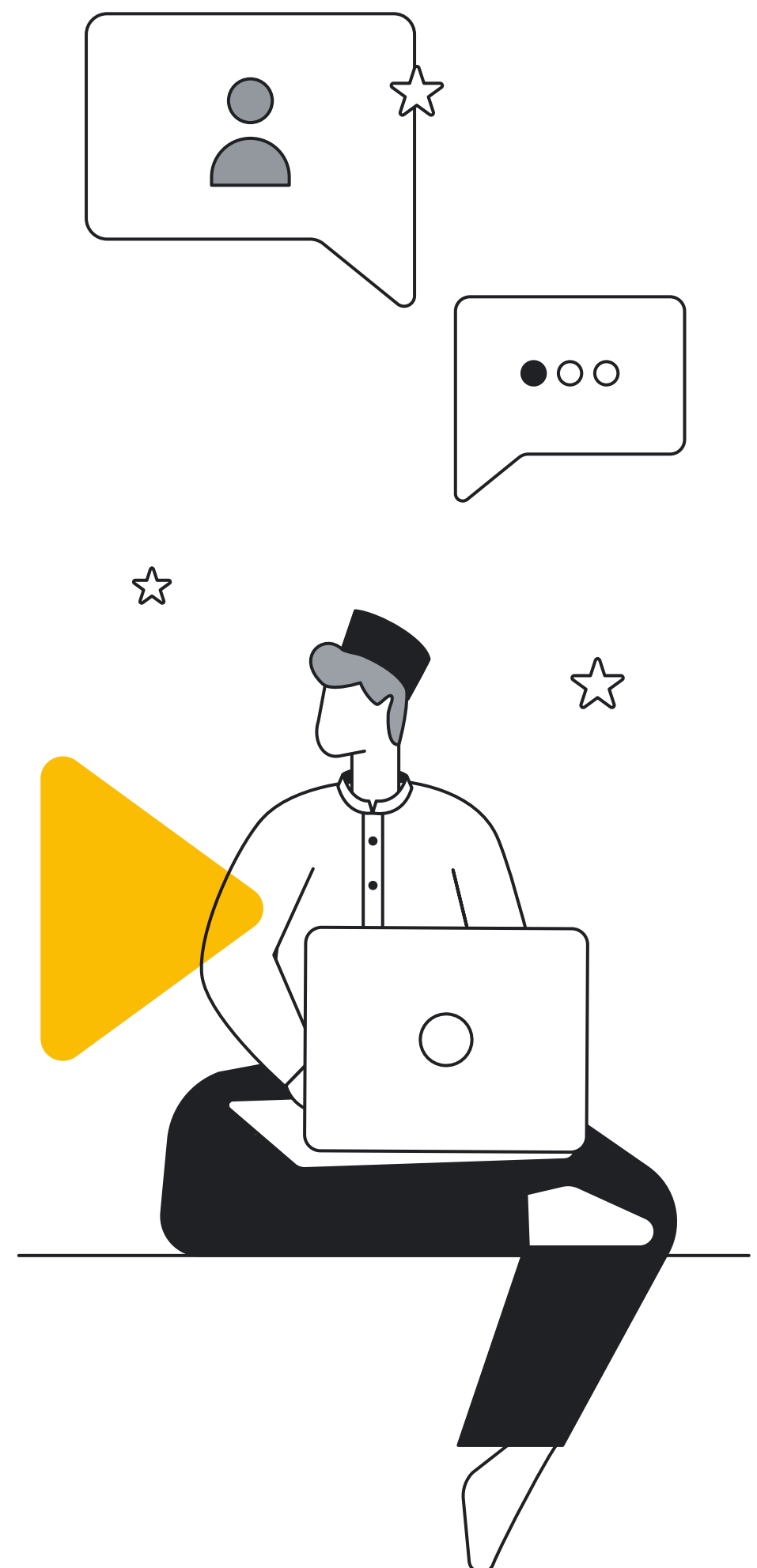
What: Expanding Consumer Interests

Beyond their spending behaviours, the digital media consumption of Indonesians also evolves during Ramadan.

Aside from religious content, they are exploring nostalgic talk show episodes, product reviews for big-ticket items, and international food shows on YouTube.

Top video content watched by consumers during Ramadan 2022

Religious	71%
Inspiration	63%
Comedy	62%
Drama/Sinetron	59%
Education	56%
F&B vlogs	54%
Travel vlogs	51%
Talk shows	51%
Reality shows	48%
Product reviews	47%





Indonesians are diving into feel-good content that provides comfort during the festive season.



• **82%**

of Gen Z have used YouTube to watch content in order to feel nostalgic

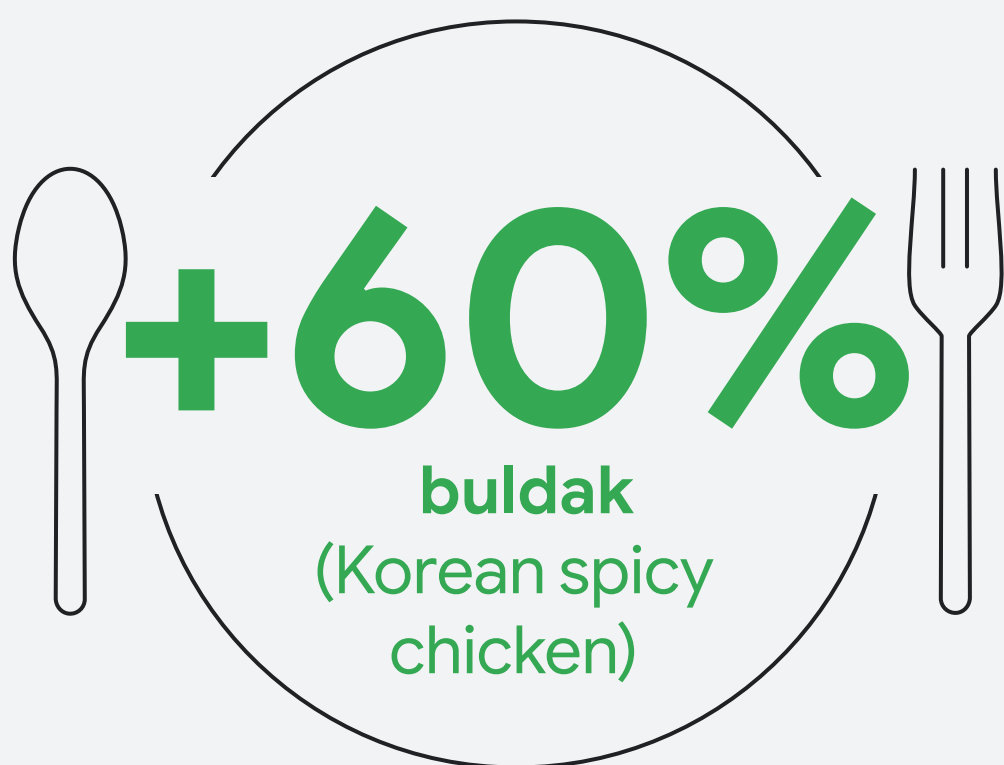


Indonesians are also exploring different content formats on YouTube, like talk shows and sportstainment

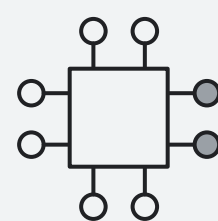
+90% Talk shows

+40% Badminton

They're taking an interest in international food cravings



They're also exploring how best to glam-up during the festive season, be it through their big-ticket purchases or their self-care necessities



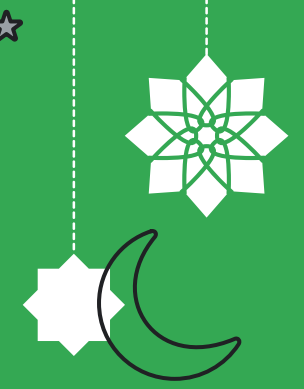
+200%
automotive
accessories
(e.g.: exterior)



+200%
deodorant

Given all these learnings from Ramadan 2022, what are the key takeaways for brands to effectively build their campaigns for Ramadan next year?

3. Ramadan 2023 Campaign Planning



Brand Implication 1:

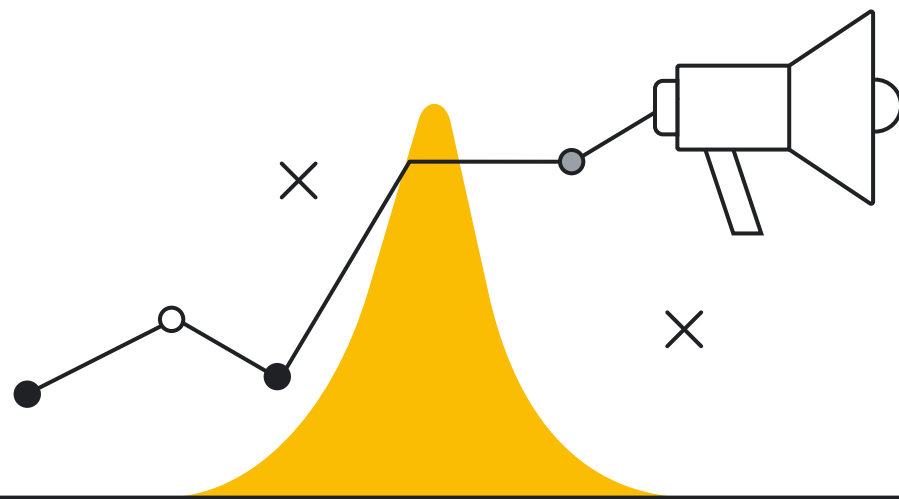
Digitize every stage of your brand funnel and be ever-present throughout the consumer journey

As consumers rely on digital tools/platforms to discover new products, compare product reviews, and make purchases, brands need to think about innovative ways to stand out digitally in every stage of their purchase journey.

Digital first:

Maximize reach with optimal frequency through high impact ads format

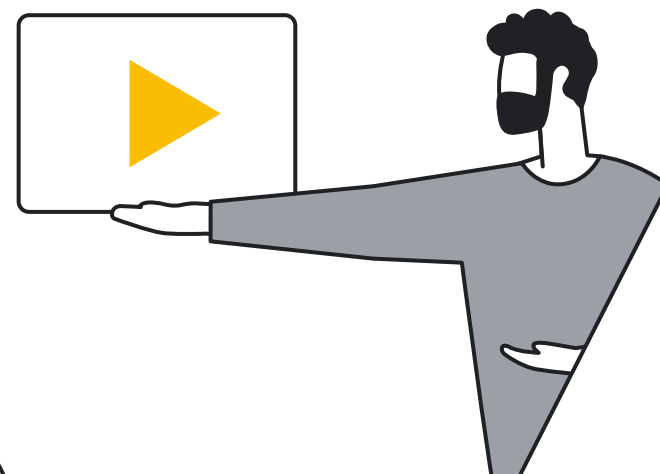
Build awareness



Influence consideration

Connect meaningfully:

Personalization through audience, messages, content/creators, and technology



Drive action



Participate intentionally:

Automation, at scale and always on



Success Stories: Nippon Paint



Knowing that their audiences largely consist of homeowners with families, Nippon Paint wanted **to drive massive awareness and appeal to their audience's interests** by partnering up with YouTube's premium line-up of family content creators. Creators like Raffi Ahmad and Irfan Hakim built content surrounding their experiences in shopping for the brand and its festive hero color 'Hijau Klepon'. Leveraging **YouTube's ability to reach a massive audience while personalizing content to their interests**, Nippon Paint successfully drove offline sales and digital performance to an extensive audience while establishing a strong positive brand presence with the creators.



>85M

Unique users

>850M

Impressions

>20%

YoY sales growth

Brand Takeaway:

- Brands need to connect meaningfully with consumers through personalized content across multiple creatives and relevant formats to maximize the opportunity to stand out among the noise in digital real estate.
- Brands can work with a variety of YouTube creators to drive mass reach and tap into content that appeals to the relevant interests of their specific target audience.



Success Stories: Telkomsel



Through their #SambungkanSenyuman campaign, Telkomsel wanted **to build stronger connections with their high-value audiences** and drive high impact during Ramadan. Leveraging the increase of YouTube consumption on connected TV, Telkomsel and OMD utilized DV360 to expand their campaign across multiple video lengths. Thus, it could **optimize in reaching its connected TV audience** while delivering **impactful storytelling** to achieve its reach and view goals.

112M

Reach

17%

Incremental reach from CTV on YouTube

+2.8%

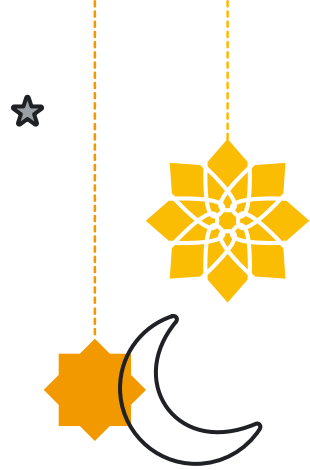
Ad recall lift

+3.2%

Consideration lift YoY sales growth

Brand Takeaway:

- Brands should maximize their reach with optimal frequency by adapting to high-impact ad formats, as 25 million Indonesians watch YouTube on their connected TV.



Brand Implication 2:

Amplify with personally relevant content

As consumers turn to nearly 500 digital touchpoints before making a purchase decision, brands need to leverage this opportunity of ‘online window shopping’ to appeal to consumers with a compelling story, and reach their consumers where it matters most.

From moments to moments marketing

A strategic planning framework to make moments relevant for your brand

Brands want to	Media	Creative	Consumers say
Stand out with greater brand differentiation and distinctiveness, drive stronger memorability, and signal market leadership	Amplify to own the moment		Tell me the meaning and significance
	<ul style="list-style-type: none">• High-impact formats• Maximize share-of-voice	<ul style="list-style-type: none">• Themed for the moment• Stories, purpose-led• Creators, unconventional ads	
Drive brand associations and relevance, increase competitiveness, upsell and cross-sell across categories	Multiple engagement based on needs and priorities		Speak to my mindset, needs, and priorities
	<ul style="list-style-type: none">• Topical/custom targeting• Cross-format orchestration• Sequencing play	<ul style="list-style-type: none">• Design with varied length and outcome varieties• Tailored messaging for all moments	
Be there with relevant, always-on presence, build recall and loyalty over time	Participate internationally		Speak to my mindset, needs, and priorities
	<ul style="list-style-type: none">• Focus on search intent and action formats• Be present throughout	<ul style="list-style-type: none">• Clear CTA for BAU assets• Try different ways of making CTA come to life	

Success Stories: Indomilk



To establish market leadership in Central Java, Indomilk, a major Indonesian FMCG brand, forged their nationwide campaign practice. Instead, it opted for a **strong hyperlocal campaign** with a **deeply personal story** relevant to moms who cook across Central Java and Yogyakarta. Reviving the passion in cooking Javanese traditional food during Ramadan, Indomilk leveraged **YouTube's Sub-Geo and Affinity Targeting** capabilities to precisely reach their Central Java consumers, and drive conversion.

>15%

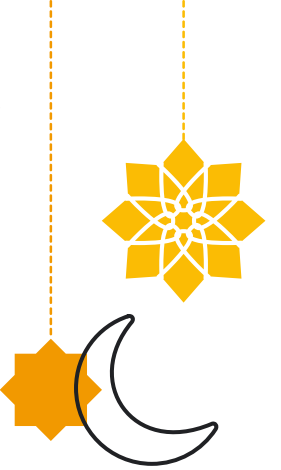
YoY sales growth in Ramadan 2022 vs 2021

37%

VTR across the audience that they reached (vs the industry benchmark at 15%)

Brand Takeaway:

- Brands can stand out by going hyperlocal, and unlocking untapped opportunities in non-metro cities with a locally relevant and resonating campaign.

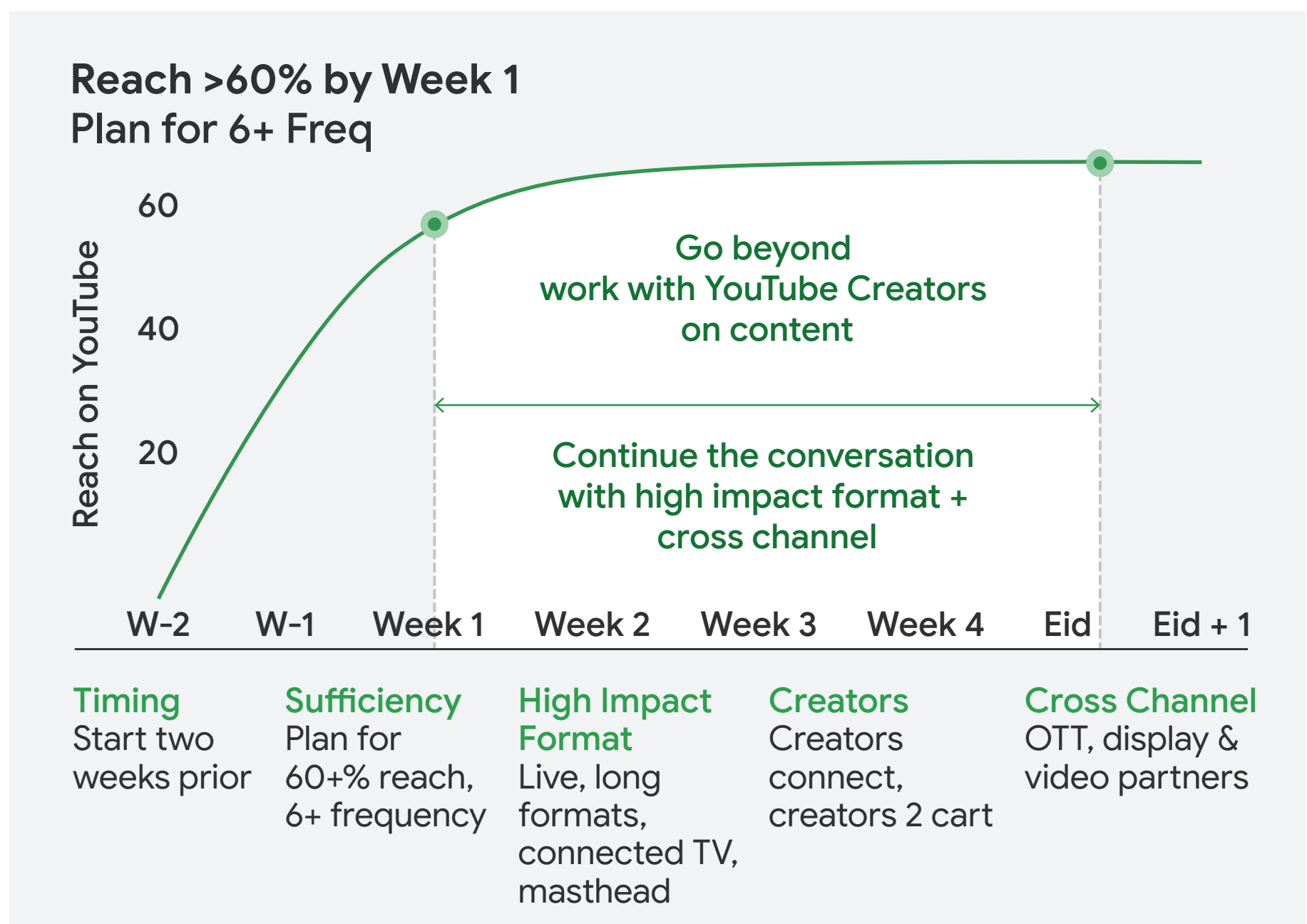
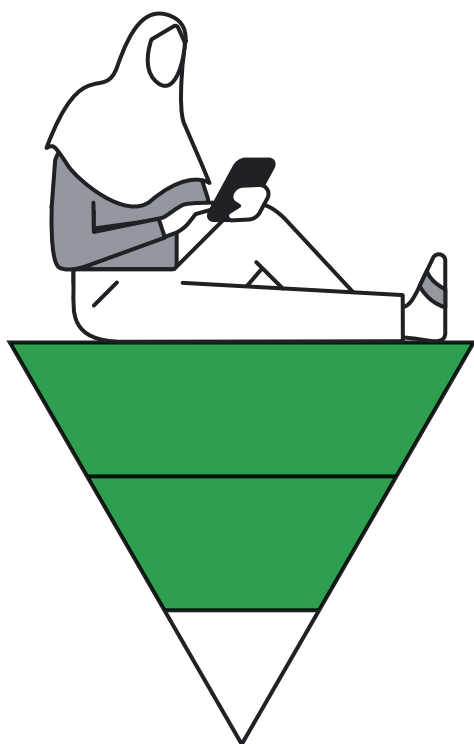


Brand Implication 3:

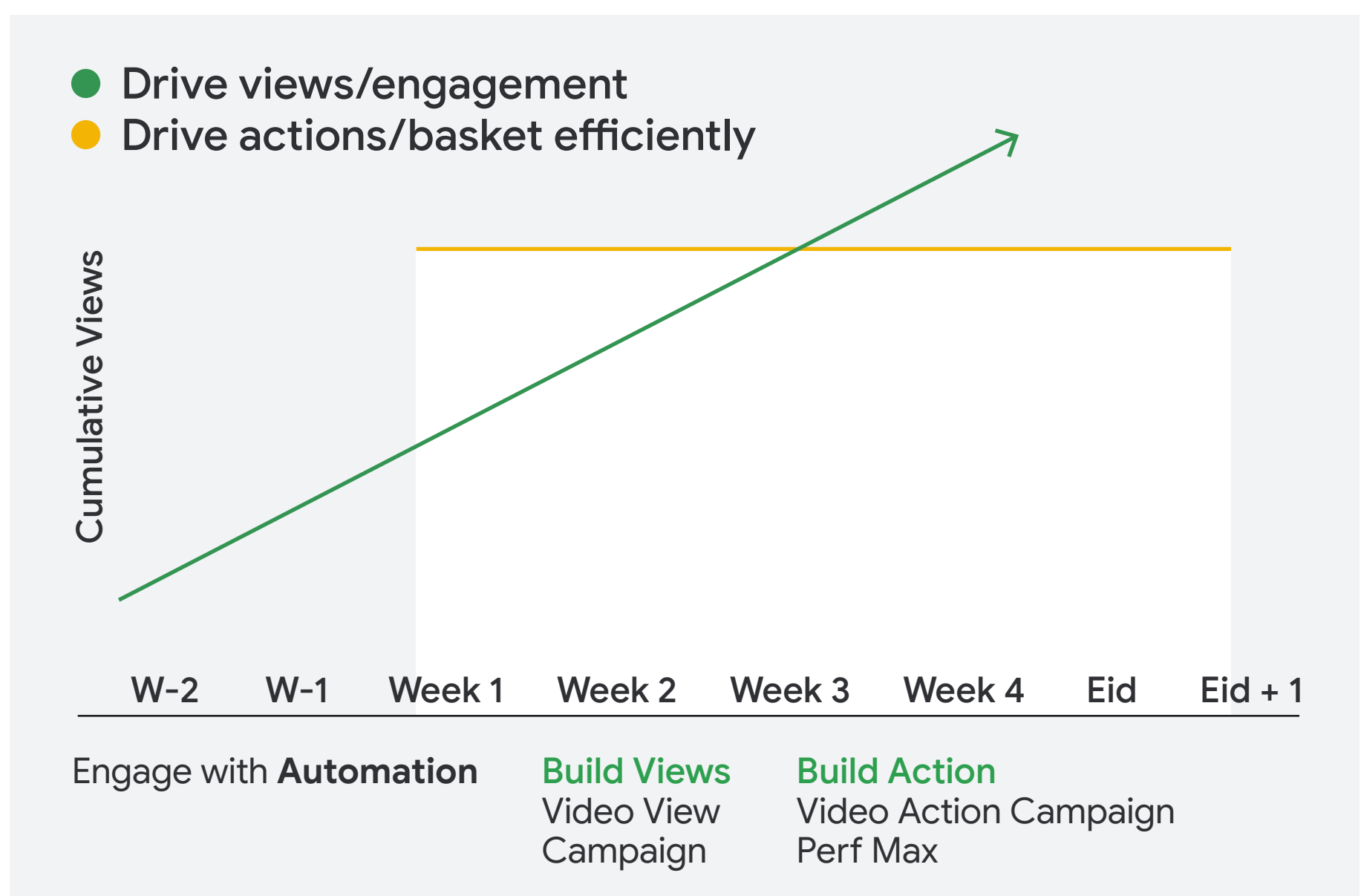
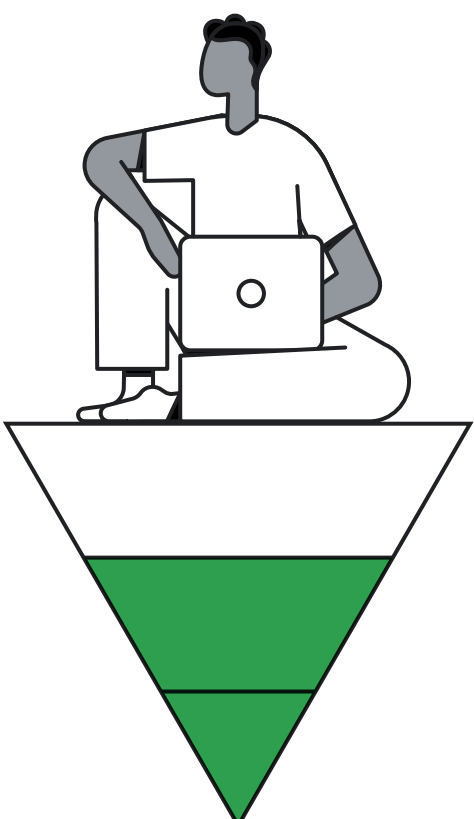
Drive efficiency across the funnel with automation

In creating a digital-first approach, leverage the power of automated solutions, and plan across the funnel to effectively and efficiently adjust to your campaign's evolving needs and consumer behaviors without compromising cost and time needed for manual adjustments.

Building awareness & consideration

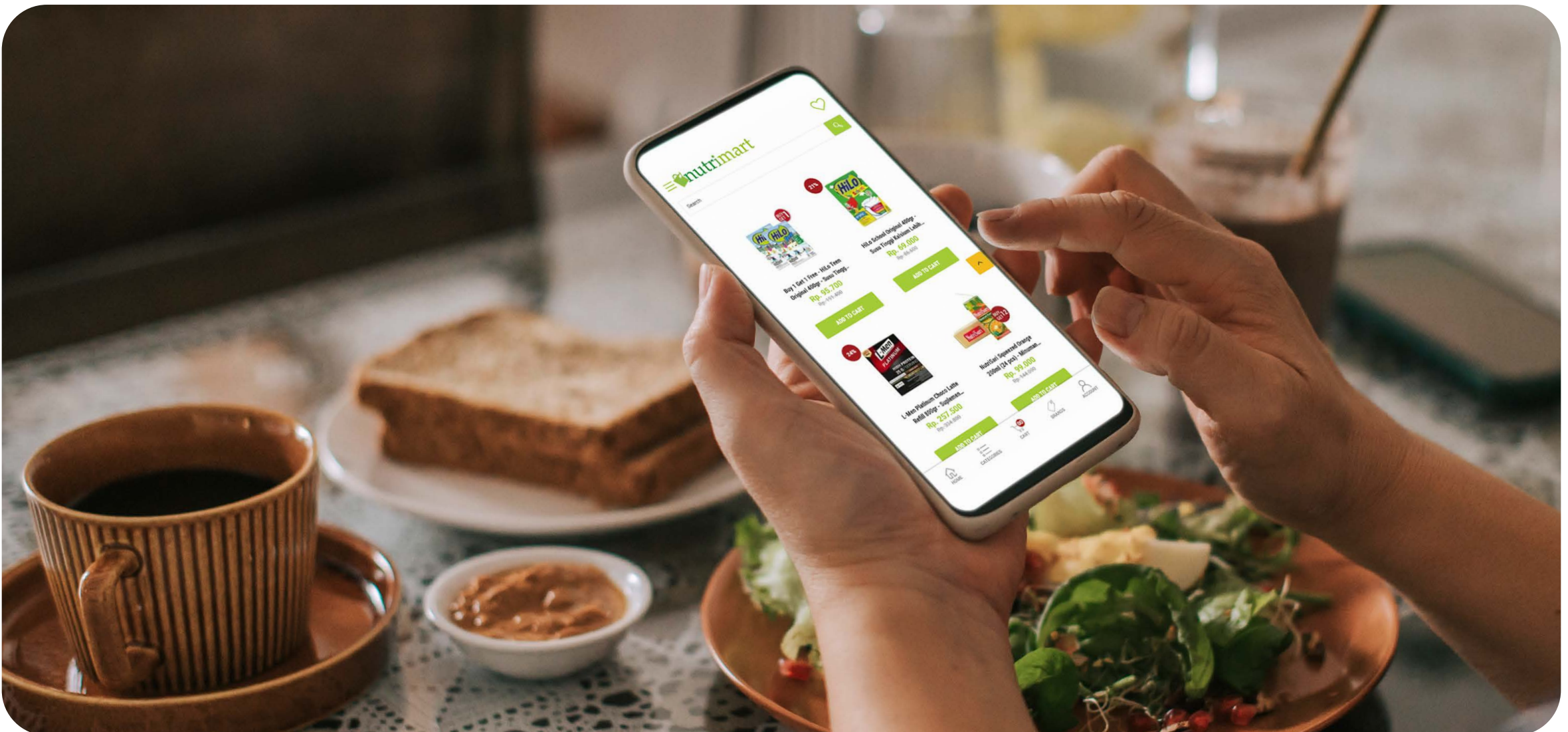


Building consideration & action





Success Stories: Nutrifood Indonesia (Nutrimart)



To build a strong presence in digital marketplaces across the nation, Nutrifood Indonesia aimed to connect closely with their consumers' **path-to-purchase** journey while **maximizing conversions** to optimize their budget. By integrating Performance Max with their Smart Shopping campaigns within Shopee, the leading CPG manufacturer effectively drove traffic and ROAS by leveraging machine learning to showcase the right products at the right time and capture and convert demand.

ROAS of

+93%

52%

Lower cost per conversion

Brand Takeaway:

- Brands can stay ahead of the game and achieve best-in-class performance by maximizing the use of machine learning-led solutions like Performance Max equipped with automated tools across bidding, audiences, creatives, and attributions to minimize downtime of manual adjustments.



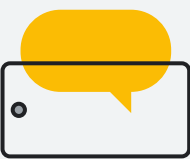
Full Funnel Success Stories: Tokopedia



Tokopedia, Indonesia’s leading marketplace, saw an opportunity to push e-commerce penetration into tier-2 cities and focused on building a **hyperlocal approach to support the growth of local sub-urban businesses.**

With THR and Mudik in effect, Tokopedia saw a great 17% increase in transactions from these sub-urban areas during Ramadan, pushing them to effectively utilize this media mix to reach audiences at every stage of the funnel.

Brandformance (brand+performance) approach:



a. Shopping Ads and Search Text Ads
Combining both formats to maximize prominent impression in Google Search and capture user intent



b. Automation
Leverage Performance Max with Feed, Dynamic Search Ads and Smart Bidding to reach audiences across Search, Display, YouTube effectively and efficiently



c. YouTube Sub-Geo with Action Focus
Laser-focusing on targeted audiences in tier-2 cities to drive action towards the marketplace



1. Awareness stage
Top of mind
+11%
YoY on hyperlocal cities

2. Consideration stage
Brand used most often
+10%
YoY on hyperlocal cities

3. Action stage
Purchase intent
+10%
YoY on hyperlocal cities

+11%

Conversion rate on cities with YouTube Campaign on (vs cities with no YouTube Campaign)

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