idEA
Asosiasi E-Commerce Indonesia

LANSKAP ECOMMERCE INDONESIA

Ignatius Untung
Ketua bidang bisnis dan ekonomi

Fondasi ekonomi digital Indonesia

idEA

JUMLAH POPULASI	PENGGUNA INTERNET	PENGGUNA MEDIA SOSIAL	MOBILE SUBSCRIPTION	PENGGUNA PONSEL AKTIF
262.0 JUTA	132.7 JUTA	106.0 JUTA	371.4 JUTA	92.0 JUTA
Urbanisasi 55%	Penetrasi 51%	Penetrasi 40%	vs. Populasi 142%	Penetrasi 35%

Sumber: We Are Social: Digital in 2017-Southeast Asia

Internet metrics

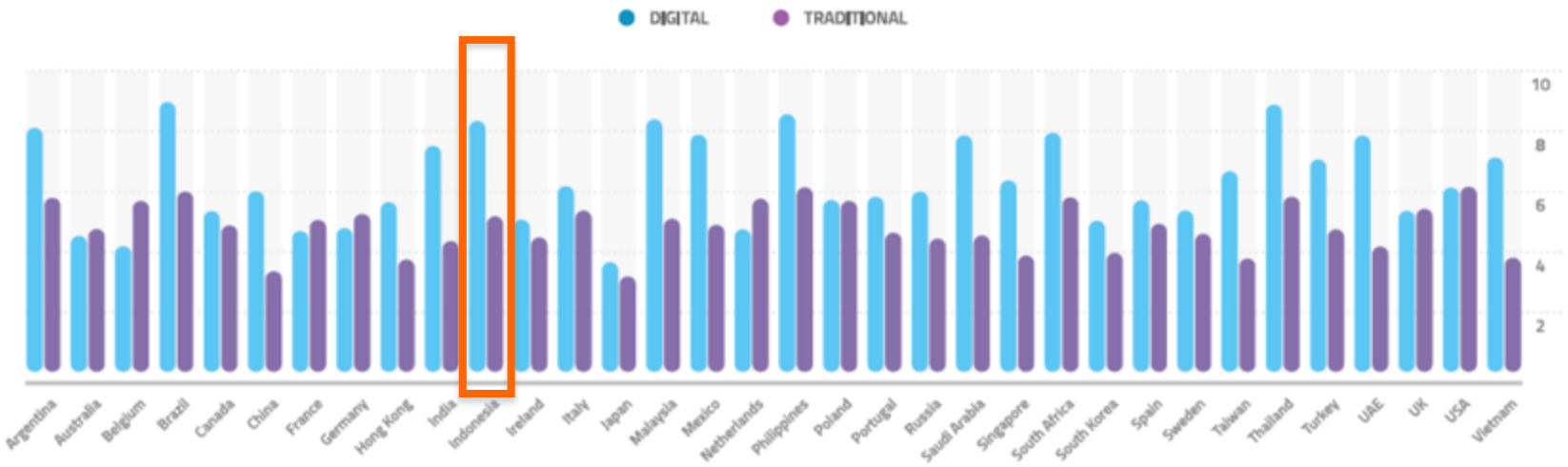
AVERAGE SPEED (FIXED)	AVERAGE SPEED (MOBILE)	AVERAGE DAILY USE (PC/TABLET)	AVERAGE DAILY USE (MOBILEPHONE)
6,4	10,9	8H	3H
mbps	mbps	44m	55m

Penetrasi Digital Indonesia

idEA

DIGITAL VS TRADITIONAL MEDIA , BY MARKET

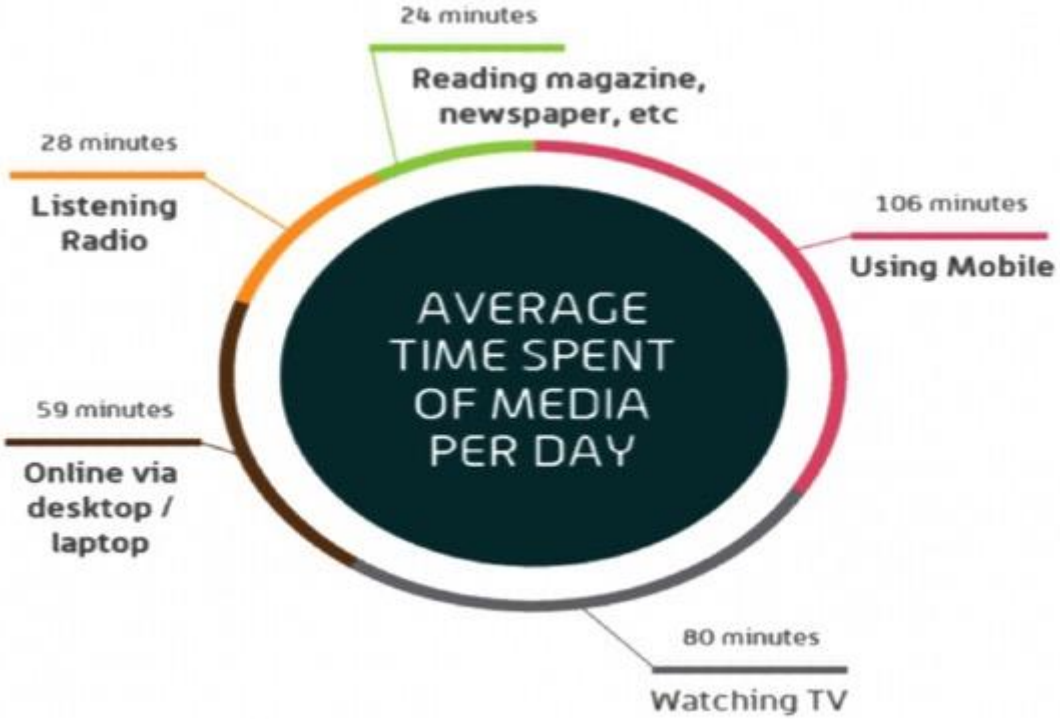
Time typically devoted to the following each day (hours)



Question: *Roughly how many hours do you spend on/doing the following each day?* • ***Source:*** *GlobalWebIndex Q1-Q2 2015* • ***Base:*** *Internet Users aged 16-64*

Want to explore this data in PRO Platform? **CLICK HERE:**
Media Consumption > Cross Media Consumption > Time Spent...

Penduduk indonesia menghabiskan tidak kurang dari 55% waktunya online



Kita bisa melakukan hampir segalanya online

idEA

YESBOSS traveloka Spotify Qraved www.BerryKitchen.com Fresh • Tasty • Delivered femaledaily.com Your Map to All Things Beauty

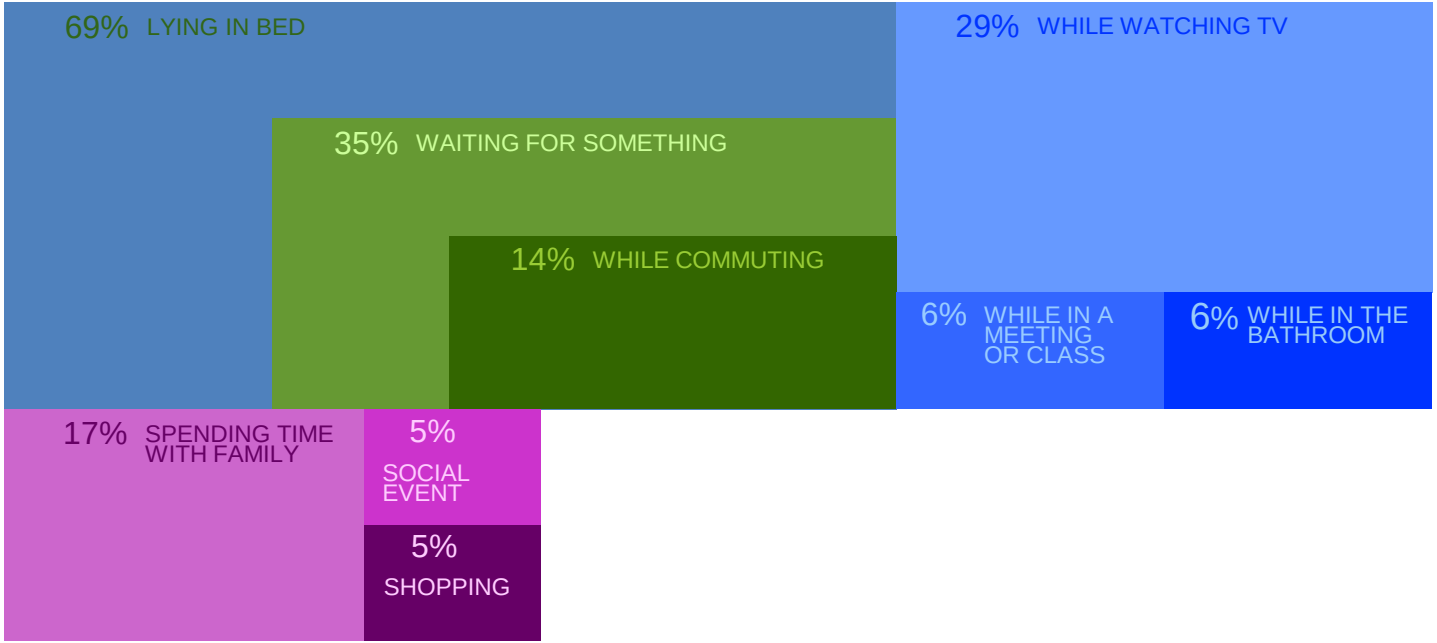
sejasa.com UBER uangteman kebunbibit Mobil123.com PORTAL OTOMOTIF NO. 1 SETIPE.COM GUDANG LISTRIK PIONEER

livingsocial OPINI.id hukum online.com airbnb PERKAKASKU.COM Pusat Belanja Perkakas Online bride story GOAL

HijUp.com LewatMana.com foodpanda HappyFresh waze Quipper SCHOOL car(e) sharing nebengers.com

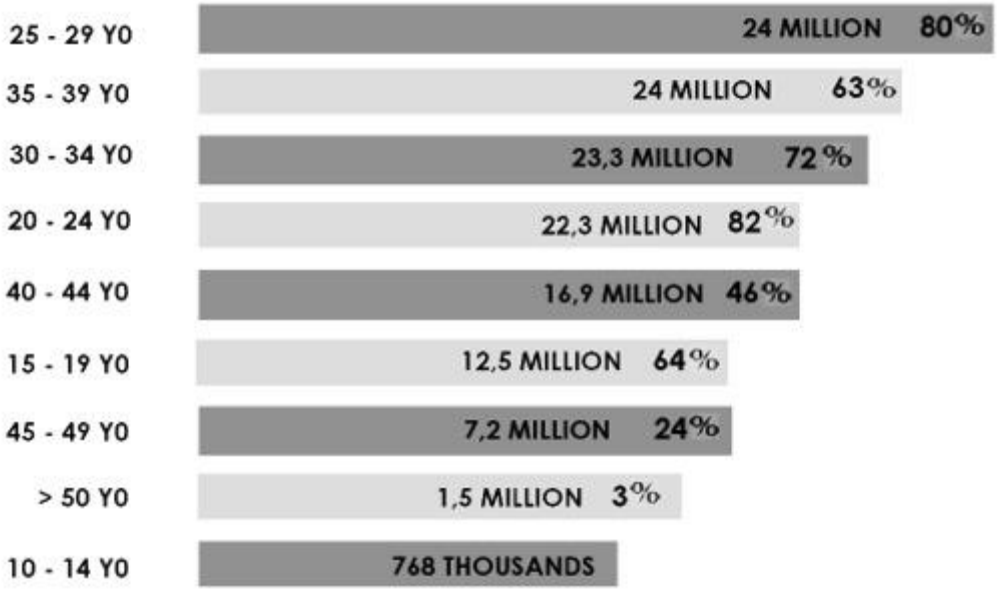
klikDOKTER MENUJU INDONESIA SEHAT telunjuk.com Sahabat Kita Saat Belanja ATURDUIT.com JobStreet.com AsmaraKu Love · Health · Beauty Bizzy FACETOFEET.COM

Kita online sambil melakukan hampir segalanya



Source: InMobi, Mobile Media Consumption-Indonesia

Profil pengguna internet Indonesia



Aktifitas ecommerce Indonesia

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MENCARI INFO PRODUK ONLINE

48%

MENGUNJUNGI TOKO ONLINE

46%

MEMBELI PRODUK ONLINE

41%

MEMBELI MELALUI PC

34%

MEMBELI MELALUI MOBILE

33%

Transaksi ecommerce

PEMBELI ECOMMERCE	DARI TOTAL POPULASI	TOTAL NILAI TRANSAKSI ECOMMERCE 2016
24.74M	9%	$5.6B

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INTERNET & DIGITAL ECONOMY IMPACT

ITC Kuningan dan Mal Ambassador Sepi Pengunjung

Selasa, 22 Juli 2014 19:37

Kamis 13 Jul 2017, 12:37 WIB

Nasib Suram Pasar Elektronik Glodok yang Sepi Ditinggal Pembeli

Muhammad Idris - detikFinance

Pengunjung Sepi, Pedagang Mangga Dua Mall Keluhkan Toko Online

WTC Mangga Dua, Dulu Primadona, Kini Lepas Magrib Saja Sudah Sepi

SELASA, 19 SEP 2017 09:54 | EDITOR : ILHAM SAFUTRA

Selasa 16 May 2017, 14:10 WIB

Tutup Toko di Blok M, Omzet Ramayana Turun Rp 3 Miliar

Senin 18 Sep 2017, 10:24 WIB

Tutup Toko di Manggarai dan Blok M, Saham Matahari Turun 3%

Danang Sugianto - detikFinance

Benarkah transaksi online jadi penyebab turunnya bisnis ritel?

Rabu , 09 Agustus 2017, 19:52 WIB

Ramayana Sebut *E-Commerce* Bukan Penyebab Daya Beli Menurun

Penjualan Turun, Pengusaha Retail Salahkan Bisnis *Online*

Selasa 22 Maret 2016, 15:41 WIB

Sopir Keluhkan Pendapatan Turun, Blue Bird: Kami Sistem Komisi

Yudhistira Amran Saleh - detikNews

Kinerja Keuangan Blue Bird dan Express Anjlok, Akibat Taksi Online?

kumparan

Selasa 21 Maret 2017 - 07:10

Potensi Saham Blue Bird dan Express Usai Kolaborasi Taksi Online

Usaha Travel Terancam Bangkrut, Karena Paket Jualan Wisata Online

Selasa, 16 Pebruari 2016 15:17

Sabtu, 06 Agustus 2016 11:56

Penjualan Tiket Pesawat Sepi, Omzet Biro Perjalanan Turun hingga 50 Persen

Nielsen: Transaksi di Hari Belanja *Online* Nasional 2016 Mencapai Rp3,3 Triliun

Tujuh Tahun Berkiprah, Tokopedia Catat Transaksi Bulanan Hingga Triliunan Rupiah

Berita Reguler Aug 19, 2016

Nilai Transaksi Bukalapak Rp 10 Triliun Tahun 2016

Selasa, 10 Januari 2017 16:44

Harbolnas Hari Ke-1, Lazada Indonesia Catat Penjualan Rp 143 Miliar

Transaksi di Tokopedia Capai Triliunan Rupiah Tiap Bulan

Lebih dari 16,5 juta produk terkirim ke seluruh tanah air per bulannya

"Bukalapak naik tiga digit atau triple digit. Satu bulan transaksi di Bukalapak mencapai Rp 1 T, dengan transaksi per hari rata-rata 150.000. So far masih terus mengalami peningkatan terus sebagaimana jumlah pelapak yang saat ini sudah 1,7 juta," ~ **CEO Bukalapak Achmad Zaky**

Bukalapak

"Pertumbuhan jumlah pengiriman JNE mulai tahun 2010 sampai dengan akhir tahun lalu konsisten mencapai 30%. Saat ini jumlah pengiriman paket setiap bulannya rata-rata 16 juta paket. Sekitar 60%-70% pengiriman JNE adalah pengiriman e-Commerce dari online marketplace" ~ ***CEO JNE Mohammad Feriadi***

JNE EXPRESS ACROSS NATIONS

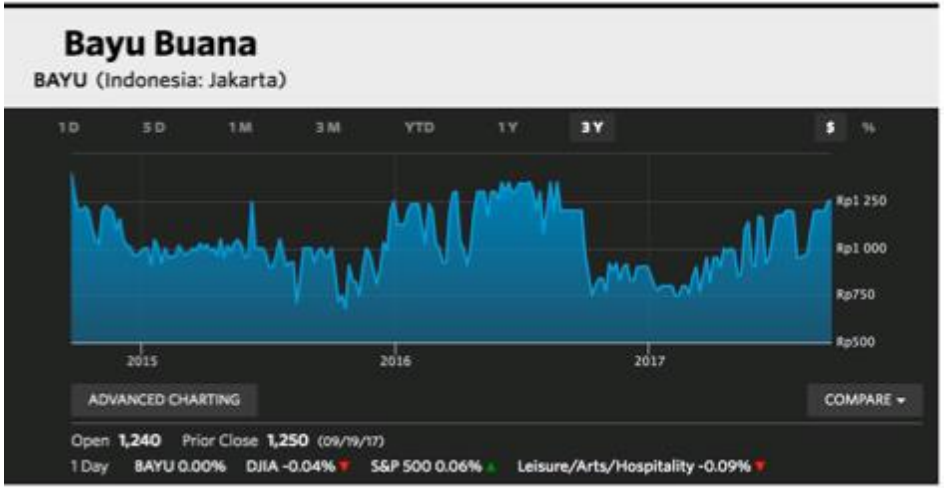
"Traffic BLANJA.com naik hampir 500% dibandingkan 2016 dengan kontribusi terbanyak dari produk Fashion dan disusul oleh produk Health & Beauty. Sementara produk UKM tumbuh hampir 40% dan diharapkan masih akan terus meningkat" ~ **CEO BLANJA.com Aulia E. Marinto**

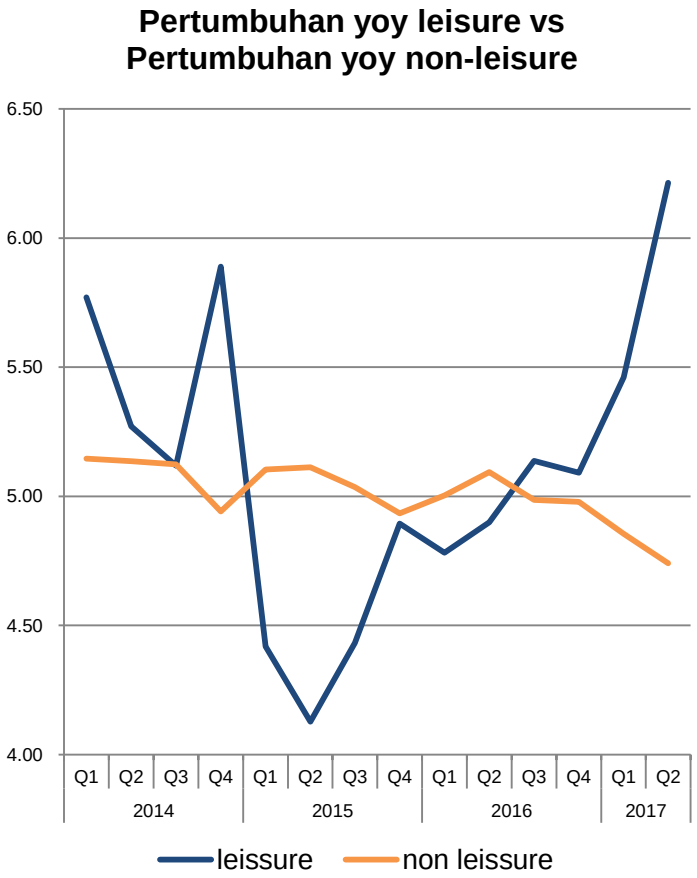
BLANJA.COM

"Saat ini di Tokopedia terdapat jutaan merchants yang menghasilkan lebih dari Rp 1 T per bulan lewat lebih dari 40 juta produk siap dibeli dengan harga terbaik dan transparan." ~ ***Comms Lead Tokopedia, Siti Fauziah***

tokopedia

Panorama Sentrawisata
PANR (Indonesia: Jakarta)
1D 5D 1M 3M YTD 1Y 3Y $ %
Rp600
Rp400
Rp200
2015
2016
2017
ADVANCED CHARTING
COMPARE
Open 595 Prior Close 595 (09/20/17)
1 Day PANR -0.84% DJIA -0.04% S&P 500 0.06% Leisure/Arts/Hospitality -0.09%


Bayu Buana
BAYU (Indonesia: Jakarta)
1D 5D 1M 3M YTD 1Y 3Y $ %
Rp1 250
Rp1 000
Rp750
Rp500
2015
2016
2017
ADVANCED CHARTING
COMPARE
Open 1,240 Prior Close 1,250 (09/19/17)
1 Day BAYU 0.00% DJIA -0.04% S&P 500 0.06% Leisure/Arts/Hospitality -0.09%


Pertumbuhan yoy leisure vs
Pertumbuhan yoy non-leisure
6.50
6.00
5.50
5.00
4.50
4.00
Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4 Q1 Q2
2014
2015
2016
2017
leissure
non leissure

Pertumbuhan Tiket.com Capai 200% per Tahun

25 August 2017

60% Responden di Indonesia Percaya Pesan Tiket Pesawat dan Hotel Online.

Oleh **Yuni Riadi** - 2 September 2016 15:00

Traveloka Ekspansi ke Kawasan ASEAN

Situs Traveloka. (Beritasatu.com/ Yudo Dahono)

Tren penjualan properti via online meningkat

Jumat, 29 September 2017 / 21:46 WIB

"Rumah123.com tumbuh 5x dari awal 2015 hingga sekarang, dan 15x untuk total value transaksi." ~ **Country General Manager Rumah123 Ignatius Untung**

rumah123.com
Situs Properti No.1 di Indonesia

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INDONESIA DIGITAL ECONOMY GROWTH STORY

No	Brand	Total Spending (In Million)
1	Djarum	Rp 1,005,243
2	Sampoerna	Rp 902,974
3	Pepsodent	Rp 804,503
4	Dettol	Rp 761,855
5	Lifebuoy	Rp 730,545
6	Frisian flag	Rp 664,059
7	Indomie	Rp 593,498
8	Mie sedaap	Rp 583,400
9	Tokopedia	Rp 559,993
10	Traveloka	Rp 553,289

NO	TOP SPENDER JAN-JUL 2017	ADEX (Rp. 000,000)
1	TRAVELOKA.COM – WEBSITE	635.587
2	INDOMIE – INSTANT NOODLE	528.980
3	VIVO – GSM MULTICARDS HANDPHONE	462.422
4	MARJAN BOUDOIN – SYRUP	448.912
5	SGM EKSPLOR 1 PLUS – GROWING UP MILK	373.192
6	SAMSUNG – GSM MULTI CARDS HANDPHONE	371.760
7	VANISH CAIR – LIQUID STAIN REMOVER	359.256
8	PANTENE ANTI KETOMBE – SHAMPOO	333.772
9	AQUA – MINERAL WATER	327.997
10	SEDAAP – INSTANT NOODLE	320.131

Semester I 2017 Belanja Iklan E-Commerce Naik, Rokok Turun

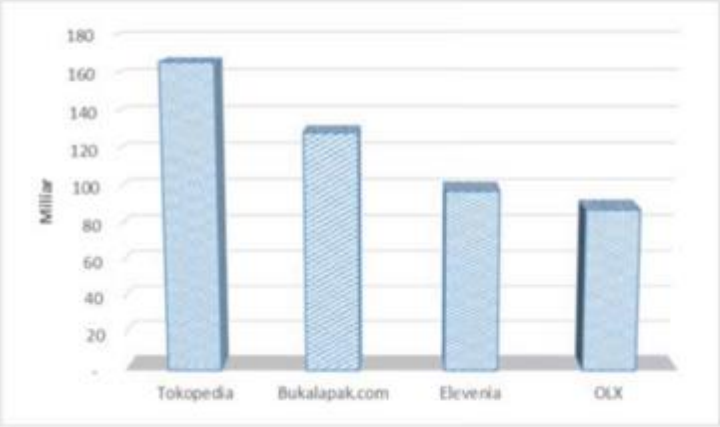
KURNIA SARI AZIZA

Kompas.com - 14/09/2017, 08:58 WIB

Empat eCommerce Keluarkan Belanja Iklan Rp 477 miliar di Kuartal I 2016

08:21:29 | 06 Apr 2016

G+ Tweet Recommend 4 Like Be the first of your friends to like this.



Infografis oleh Adstensity

100.000 driver X 8 trip X Rp.10.000

= Rp.8.000.000.000/hari

Engagement

Total Visits	88.76M	87.23M
Avg. Visit Duration	00:04:57	00:06:53
Pages per Visit	4.97	7.26
Bounce Rate	47.22%	39.56%

Engagement

Total Visits	1.63B	1.04B
Avg. Visit Duration	00:05:45	00:03:53
Pages per Visit	5.76	6.05
Bounce Rate	40.25%	48.60%

Engagement

Total Visits	2.37B	1.24B
Avg. Visit Duration	00:06:06	00:05:58
Pages per Visit	9.49	8.33
Bounce Rate	36.96%	39.99%

Engagement

Total Visits	23.86M	110.25M
Avg. Visit Duration	00:01:41	00:02:24
Pages per Visit	2.2	3.81
Bounce Rate	65.36%	38.87%

Engagement

Total Visits	26.83M	57.16M
Avg. Visit Duration	00:05:18	00:10:23
Pages per Visit	5.02	5.64
Bounce Rate	29.72%	32.57%

Engagement

Total Visits	2.14M	27.29M
Avg. Visit Duration	00:07:35	00:08:15
Pages per Visit	6.64	10.47
Bounce Rate	43.12%	32.32%

Bocoran Sebut Go-Jek Layani 8 Pesanan Tiap Detik

YOGA HASTYADI WIDIARTANTO

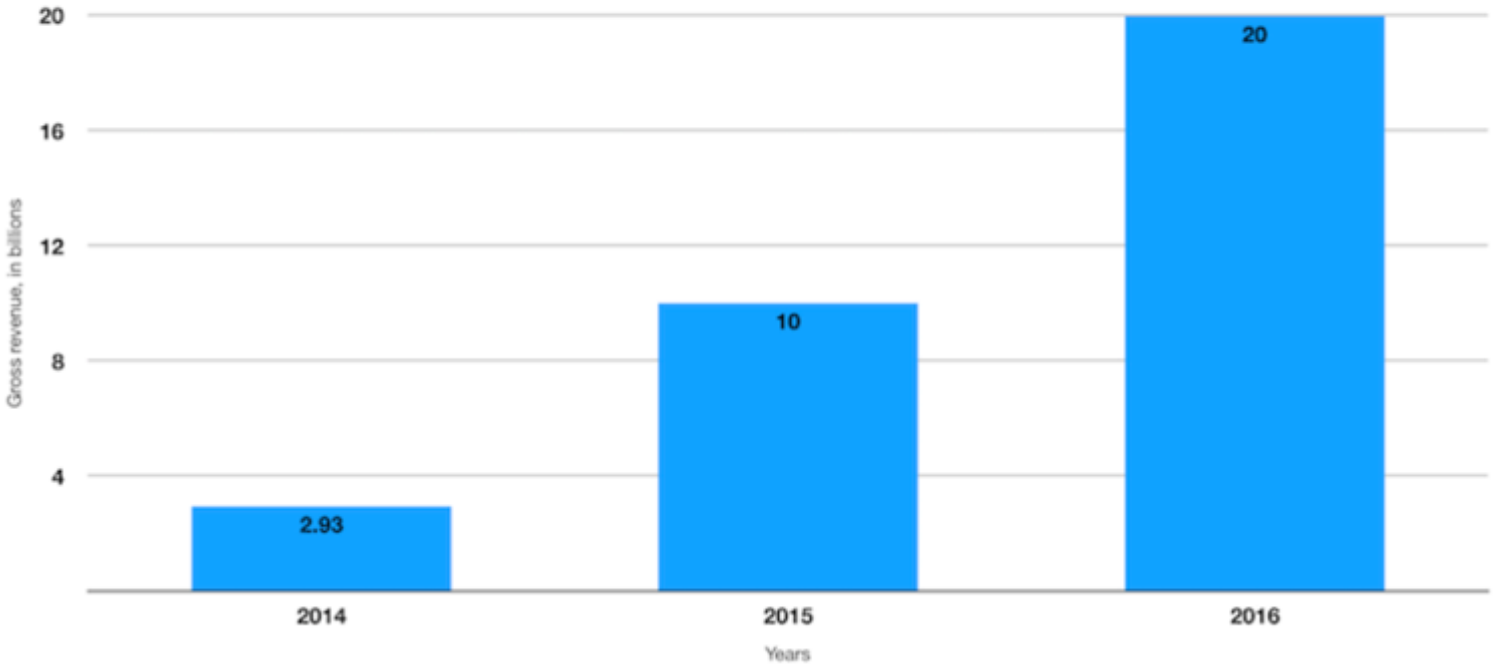
Kompas.com - 18/07/2016, 14:16 WIB

8 detik X 60 detik X 60 menit x 24 jam X Rp.10.000

= Rp. 6.912.000.000/hari

= Rp.2.073.600.000.000/bulan

Uber growth chart (gross revenue) 2014-2016, in billions



16.500.000/30 hari = 550.000 transaksi/hari

= Rp. 1.818.181/transaksi

Hari Jomblo, Alibaba Cetak Rekor Transaksi Rp 238 Triliun

Setiap harinya

Traveloka memperoleh 150.000 kunjungan dengan konversi transaksi sekitar 2-3%. Di tahun 2014 ini mereka dapat meningkatkan perolehan dengan target kenaikan pendapatan 15% setiap bulannya.

Engagement

Total Visits	26.83M
Avg. Visit Duration	00:05:18
Pages per Visit	5.02
Bounce Rate	29.72%

26.830.000 visitor x 2.5% x 12 bulan x Rp.300.000

= Rp.2.414.700.000.000/tahun

Panorama tours
experience life

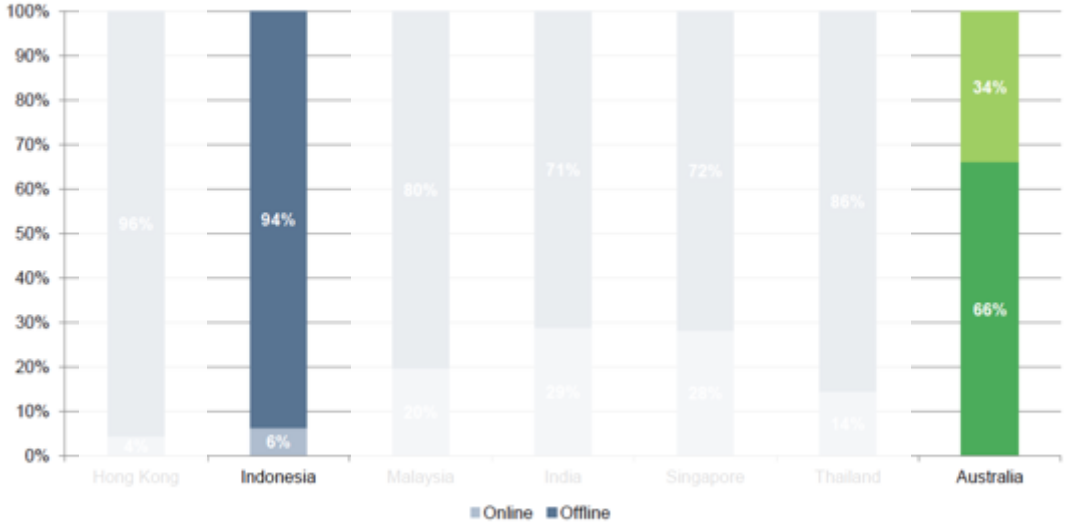
Pendapatan Usaha Meningkat 16% menjadi Rp.2 Triliyun
Revenue Increases 16% to Rp 2 Trillion

Laba Bersih Meningkat 16% menjadi Rp. 46 Miliyar
Net Income Rises 16% to Rp 46 Billion

85% Pendapatan Perseroan dari Pilar Travel & Leusure dan Inbound
85% of the Company's revenues from Inbound & Travel and Leisure Pilar

Sales Growth meningkat 16 %
Sales Growth increases 16%

Real Estate Advertising Share by Channel - 2016

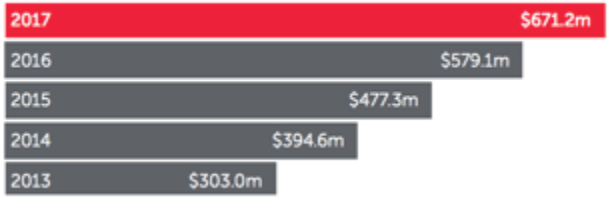


FROST & SULLIVAN

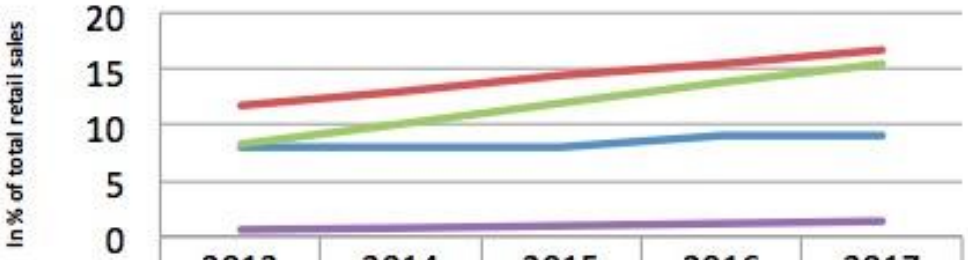
REA Group®

Revenue*

$671.2m +16%



E-commerce share of total retail sales US, UK, China & India - 2013-2017

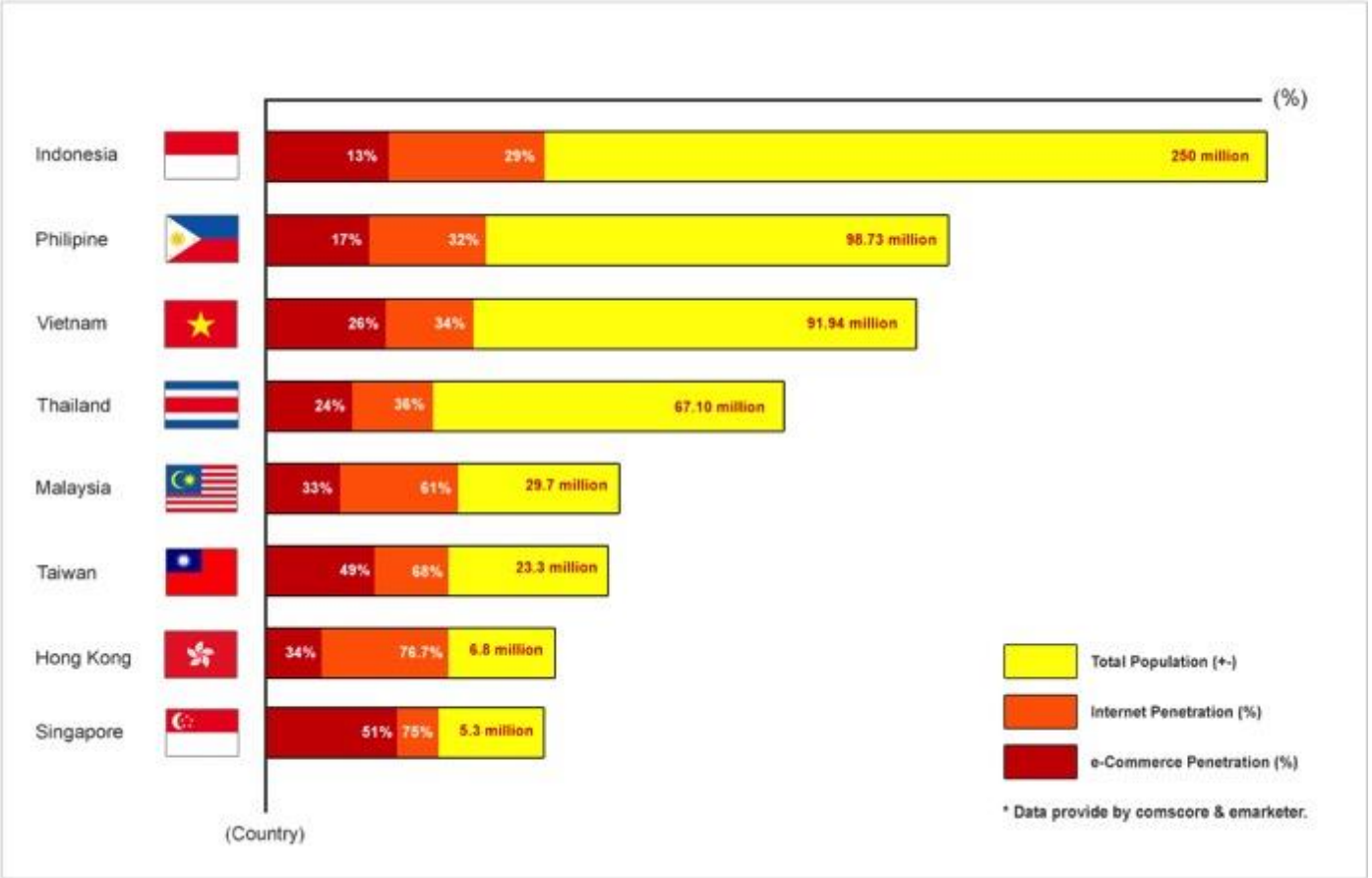


	2013	2014	2015	2016	2017
US	8	8	8	9	9
UK	11.7	13.1	14.5	15.6	16.7
China	8.3	10.1	12	13.8	15.5
India	0.6	0.7	0.9	1.1	1.3

Sources: eMarketer, Forrester Research

Indonesia ecommerce share of total retail sales 2017

<2%


(%)
Indonesia
13%
29%
250 million
Philipine
17%
32%
98.73 million
Vietnam
26%
34%
91.94 million
Thailand
24%
36%
67.10 million
Malaysia
33%
61%
29.7 million
Taiwan
49%
68%
23.3 million
Hong Kong
34%
76.7%
6.8 million
Singapore
51%
75%
5.3 million
(Country)
Total Population (+-)
Internet Penetration (%)
e-Commerce Penetration (%)
* Data provide by comscore & emarketer.

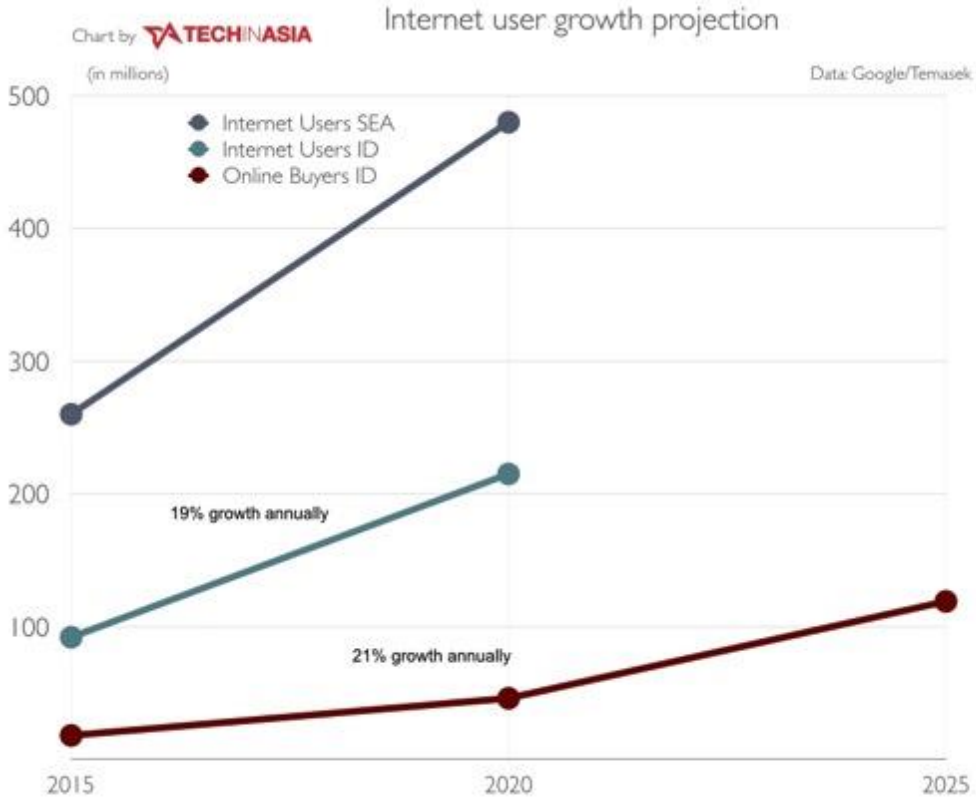
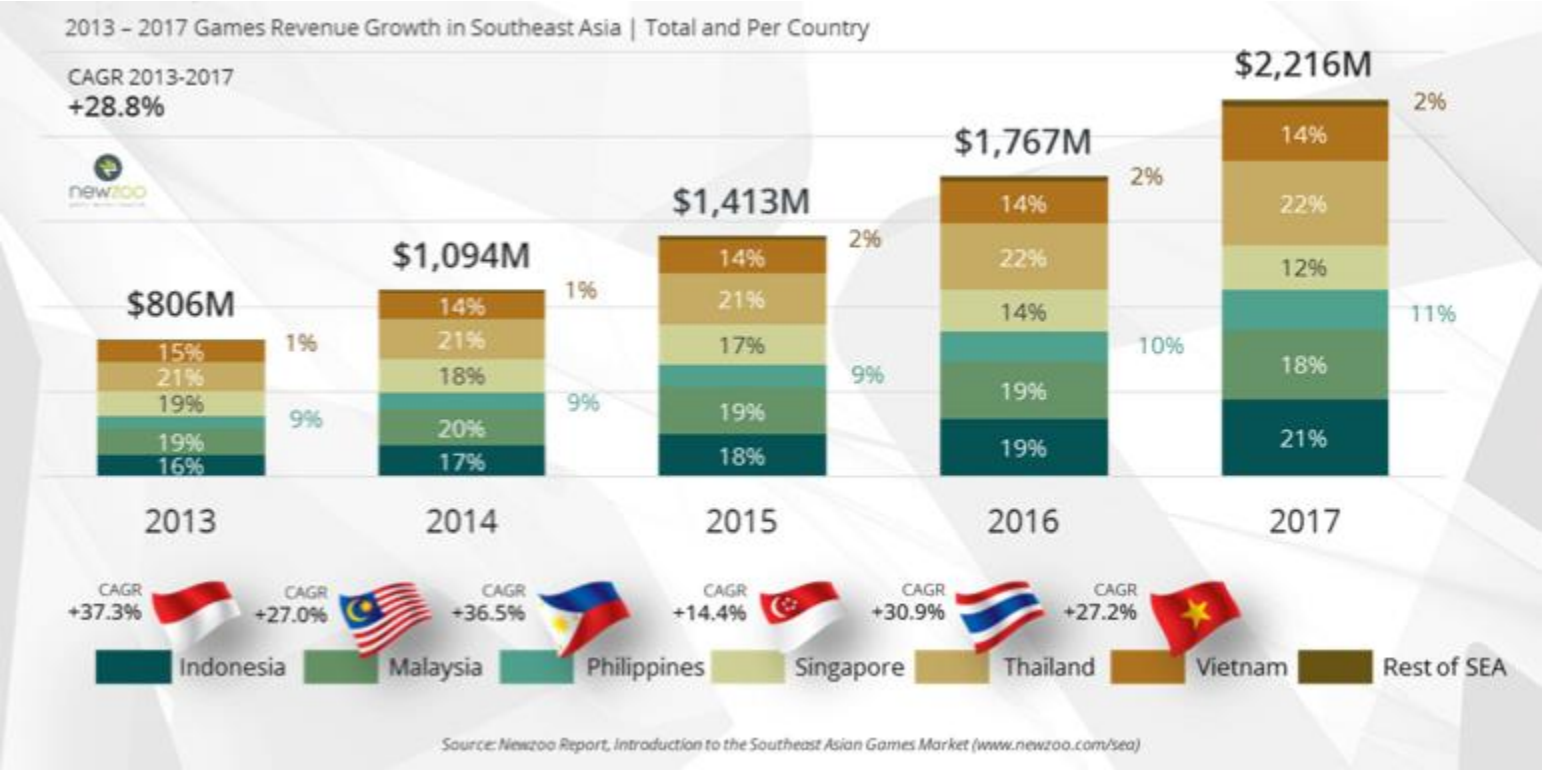
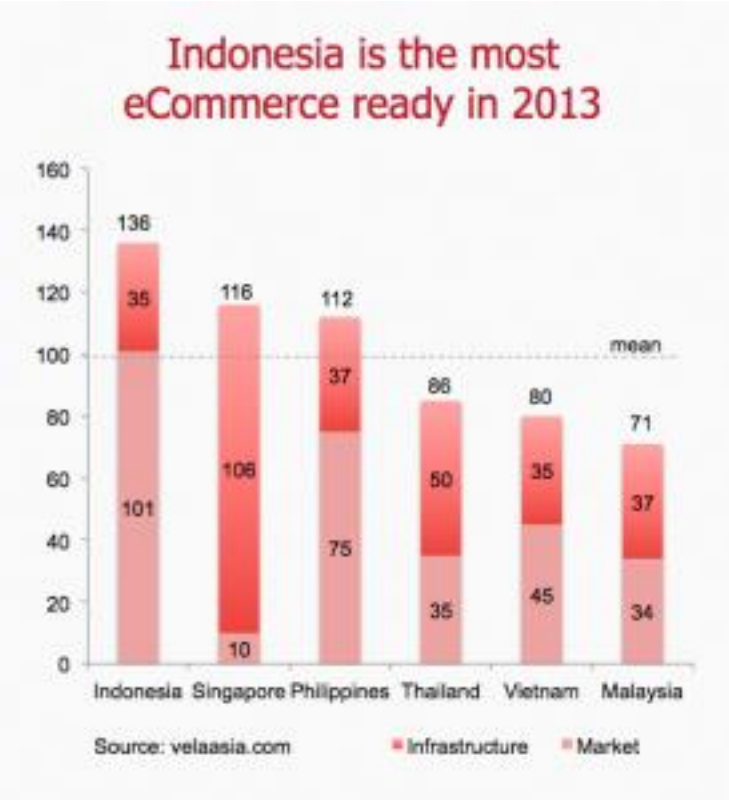


Chart by TECHINASIA
Internet user growth projection
(in millions)
Data: Google/Temasek
500
400
300
200
100
Internet Users SEA
Internet Users ID
Online Buyers ID
19% growth annually
21% growth annually
2015
2020
2025


2013 – 2017 Games Revenue Growth in Southeast Asia | Total and Per Country
CAGR 2013-2017
+28.8%
newzoo
$806M
15%
21%
19%
19%
16%
1%
9%
$1,094M
14%
21%
18%
20%
17%
1%
9%
$1,413M
14%
21%
17%
19%
18%
2%
9%
$1,767M
14%
22%
14%
19%
19%
2%
10%
$2,216M
14%
22%
12%
18%
21%
2%
11%
2013
2014
2015
2016
2017
CAGR +37.3%
CAGR +27.0%
CAGR +36.5%
CAGR +14.4%
CAGR +30.9%
CAGR +27.2%
Indonesia
Malaysia
Philippines
Singapore
Thailand
Vietnam
Rest of SEA
Source: Newzoo Report, Introduction to the Southeast Asian Games Market (www.newzoo.com/sea)


Indonesia is the most eCommerce ready in 2013
160
140
120
100
80
60
40
20
0
136
35
101
116
106
10
112
37
75
86
50
35
80
35
45
71
37
34
mean
Indonesia
Singapore
Philippines
Thailand
Vietnam
Malaysia
Source: velaasia.com
Infrastructure
Market

ASEAN-6 digital population 2017
Indonesia
Population 262.0 M
Internet users 132.7 M
Social media users 106.0 M
Mobile connections 371.4 M
Mobile social users 92.0 M
Thailand
Population 68.22 M
Internet users 46.00 M
Social media users 46.00 M
Mobile connections 90.94 M
Mobile social users 42.00 M
Malaysia
Population 30.96 M
Internet users 22.00 M
Social media users 22.00 M
Mobile connections 42.93 M
Mobile social users 20.00 M
Singapore
Population 5.74 M
Internet users 4.71 M
Social media users 4.40 M
Mobile connections 8.44 M
Mobile social users 4.00 M
Philippines
Population 103.0 M
Internet users 60.0 M
Social media users 60.0 M
Mobile connections 129.4 M
Mobile social users 54.0 M
Vietnam
Population 94.93 M
Internet users 50.05 M
Social media users 46.00 M
Mobile connections 124.7 M
Mobile social users 41.00 M
Source: We Are Social, Hootsuite Jan 2017
ASEAN up
Empowering business in Southeast Asia - aseanup.com

CRUNCH NETWORK

Indonesia will be Asia's next biggest e-commerce market

Posted Jul 29, 2016 by Hugh Harsono

Google: Indonesia will dominate Southeast Asian ecommerce

Potensi e-Commerce: Asia Tenggara dan Indonesia

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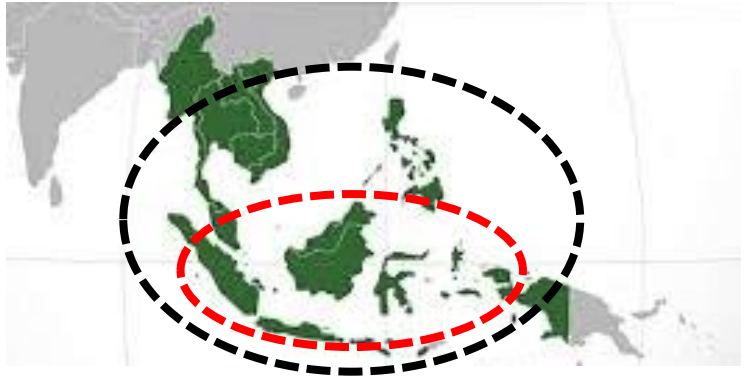

Pasar eCommerce di SEA **tumbuh dari US$5,5** miliar di 2015 menjadi **US$87,8 Mn di 2025**. Ada sekitar **3,8 Mn pengguna baru** hadir **setiap bulannya**.

Indonesia berkontribusi sekitar 50% dari pengeluaran eCommerce pada 2025 dan investasi e-Commerce s/d 2017:

- **US$ 9 Bn (estimasi)**

Pasar e-Commerce Indonesia diperkirakan mencapai **US$130 miliar di 2020**

Source: e-economy SEA by Google and Temasek report, 2016

Potensi dan basis pengembangan ekonomi digital Indonesia

Transaksi e-Commerce tumbuh sebesar 30-50% tahun 2017 dibandingkan 2014.

Besaran transaksi e-Commerce masih < 2% dari total transaksi perdagangan konvensional.

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UNDER DISRUPTIVE THREAT?

DIGITAL ILLITERATE OFFLINE RETAILER

MIDDLEMAN / RETAILER

TRADITIONAL MEDIA

BANK

BANK INDONESIA
SHK608572
SERATUS RIBU RUPIAH
100000
BANK INDONESIA
SHL608481

UNSKILLED LABOUR

DIGITAL ILLITERATE LOCAL PRODUCER/SELLER

SELF-SOURCING CORPORATION

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RIDING ON DISRUPTIVE WAVE

PART TIMERS

Reseller

CROWDSOURCE CONTRIBUTORS

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RISK TO BE MANAGED

“Lets make sure the core business is more profitable than the venture capital business”

- Incentive-driven market → will form a price sensitive instead of value creation market
- Monopoly, winner takes all, no/less option for buyer
- Destruct instead of disrupt. From hero to zero.

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THANK YOU