



Marketing Outlook 2018

Welcome to Leisure Economy

YUSWOHADY

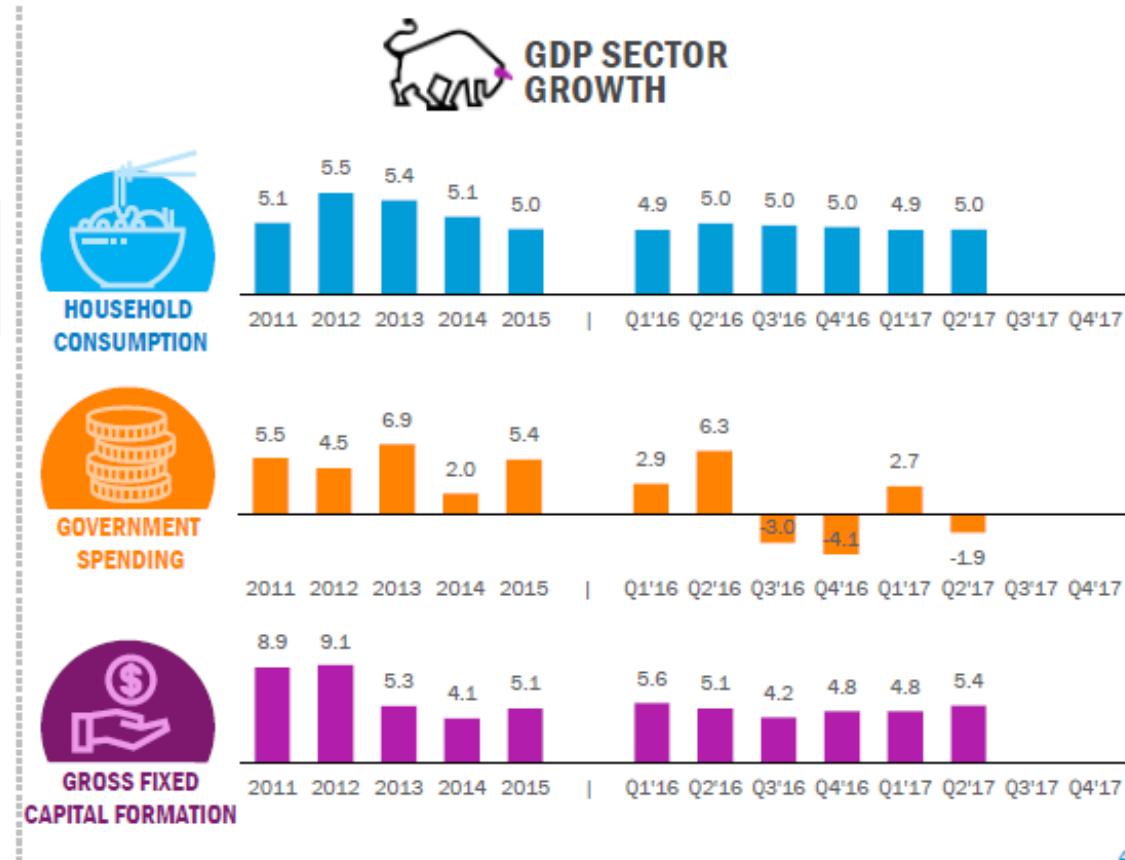
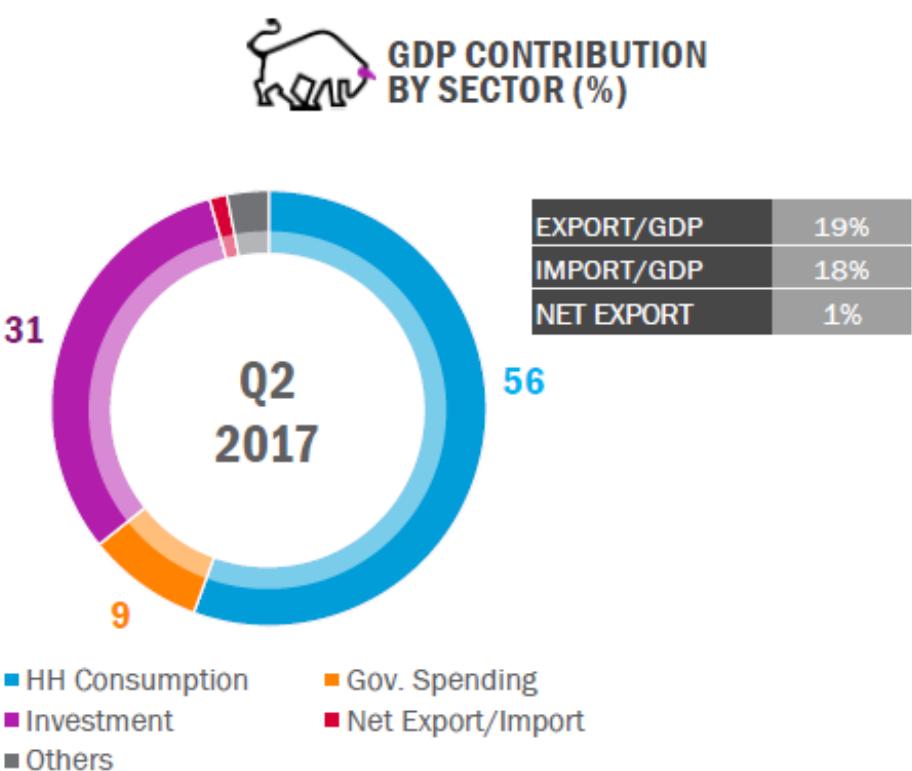
CONTENTS

- **The Phenomenon**
- **The Consumers**
- **The Shifting**
- **The Drivers**

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GDP: Household Consumption & Investment Are Stable



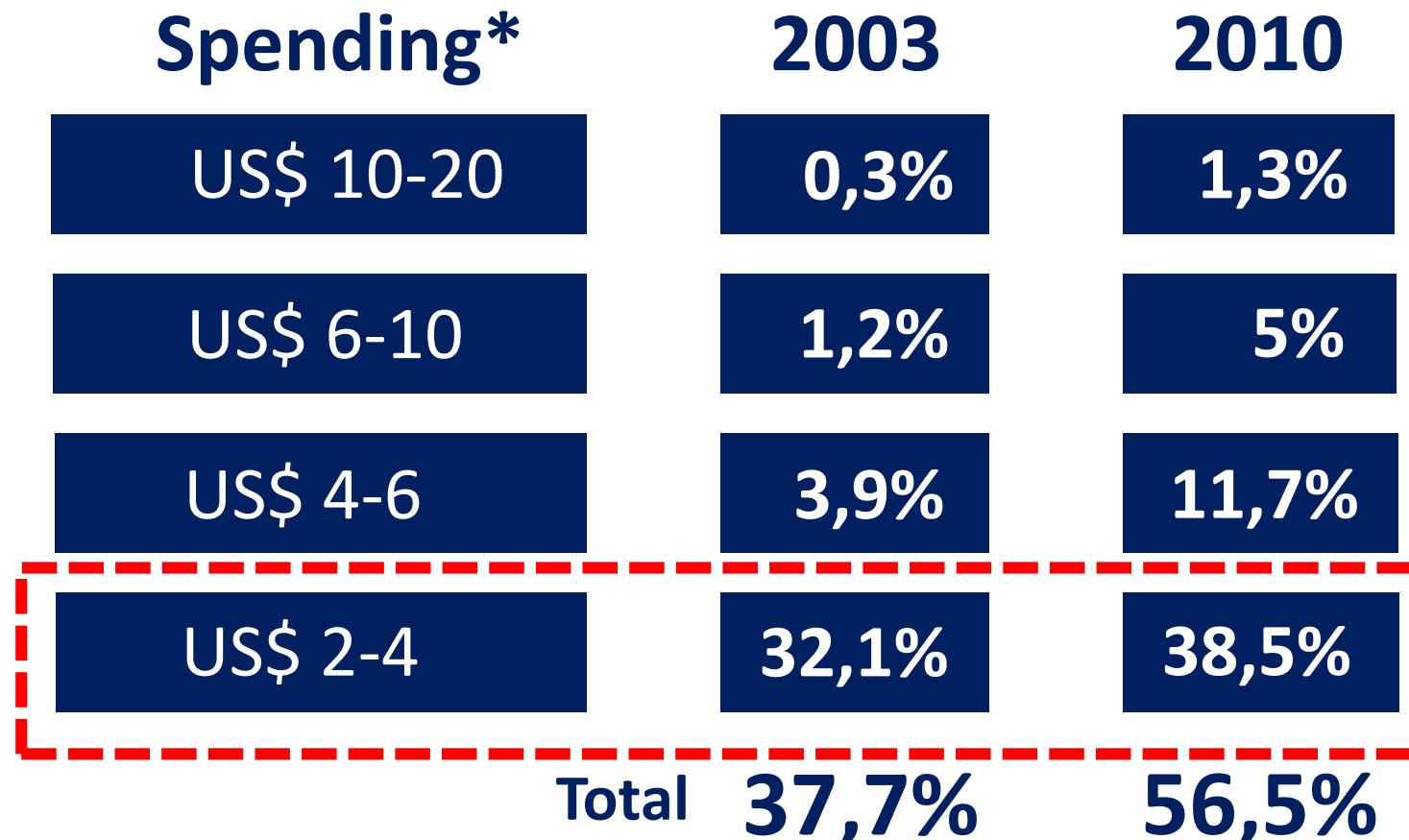
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A high-angle photograph capturing a massive traffic jam in a city. The scene is filled with a dense concentration of vehicles, primarily small sedans and SUVs, interspersed with larger buses and several white taxis. The most striking feature is the overwhelming number of motorbikes, their riders all wearing helmets, which form the majority of the traffic. The sheer volume of people and vehicles creates a dark, almost black, texture across the frame.

The Rise of Middle-Class

Indonesian Middle Class: We've just started



*Per capita/day



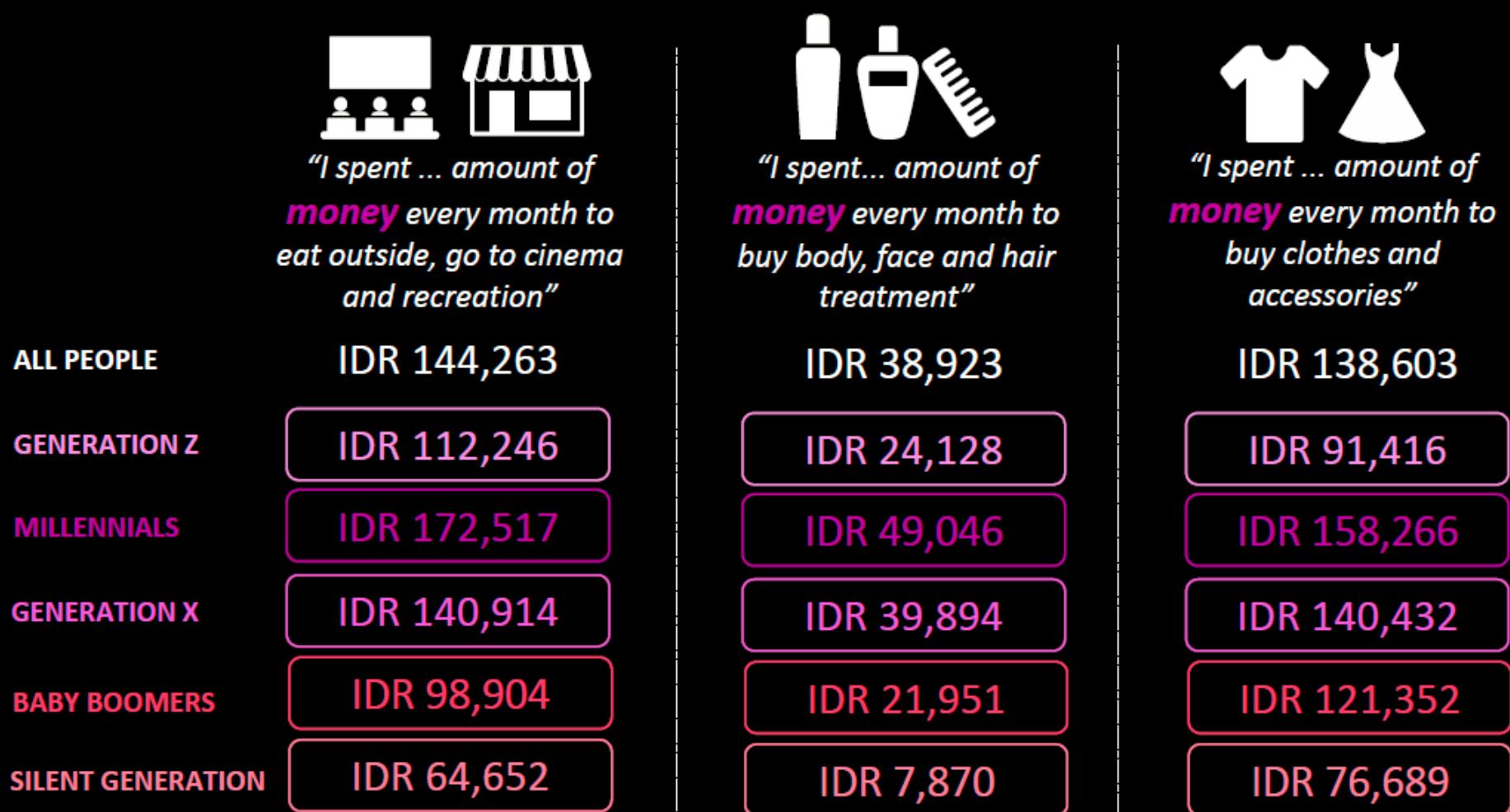
Gen Y is the Next Wave

Chart 1: An overview of the working generations

Characteristics	Maturists (pre-1945)	Baby Boomers (1945-1960)	Generation X (1961-1980)	Generation Y (1981-1995)	Generation Z (Born after 1995)
Formative experiences	Second World War Rationing Fixed-gender roles Rock 'n' Roll Nuclear families Defined gender roles — particularly for women	Cold War Post-War boom "Swinging Sixties" Apollo Moon landings Youth culture Woodstock Family-oriented Rise of the teenager	End of Cold War Fall of Berlin Wall Reagan / Gorbachev Thatcherism Live Aid Introduction of first PC Early mobile technology Latch-key kids; rising levels of divorce	9/11 terrorist attacks PlayStation Social media Invasion of Iraq Reality TV Google Earth Glastonbury	Economic downturn Global warming Global focus Mobile devices Energy crisis Arab Spring Produce own media Cloud computing Wiki-leaks
Percentage in U.K. workforce*	3%	33%	35%	29%	Currently employed in either part-time jobs or new apprenticeships
Aspiration	Home ownership	Job security	Work-life balance	Freedom and flexibility	Security and stability
Attitude toward technology	Largely disengaged	Early information technology (IT) adaptors	Digital Immigrants	Digital Natives	"Technoholics" – entirely dependent on IT; limited grasp of alternatives
Attitude toward career	Jobs are for life	Organisational — careers are defined by employers	Early "portfolio" careers — loyal to profession, not necessarily to employer	Digital entrepreneurs — work "with" organisations not "for"	Career multitaskers — will move seamlessly between organisations and "pop-up" businesses
Signature product	 Automobile	 Television	 Personal Computer	 Tablet/Smart Phone	Google glass, graphene, nano-computing, 3-D printing, driverless cars
Communication media	 Formal letter	 Telephone	 E-mail and text message	 SMS Text or social media	 Hand-held (or integrated into clothing) communication devices
Communication preference	 Face-to-face	 Face-to-face ideally, but telephone or e-mail if required	 SMS Text messaging or e-mail	 Online and mobile (text messaging)	 Facetime
Preference when making financial decisions	 Face-to-face meetings	 Face-to-face ideally, but increasingly will go online	 Online — would prefer face-to-face if time permitting	 Face-to-face	Solutions will be digitally crowd-sourced

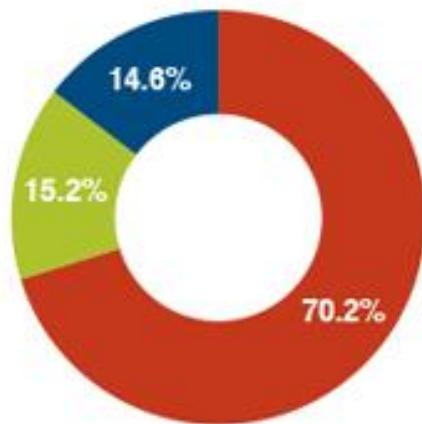
*Percentages are approximate at the time of publication.

Millennials Spends More Money



Remember!!! Gen Y Are Less Loyal Customers

Do you think that the millennials are more, or less loyal customers than previous generations?



- Millennials are less loyal customers
- Millennials are more loyal customers
- The same

Hotel selection criteria ranked by importance



Established Incumbent vs New Challenger



Versus



Versus



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Economic Shift: The 3 Trends

#1



Infrastructure-Driven Economy

#2



The Down of Goods Economy

#3



The Rise of Leisure Economy

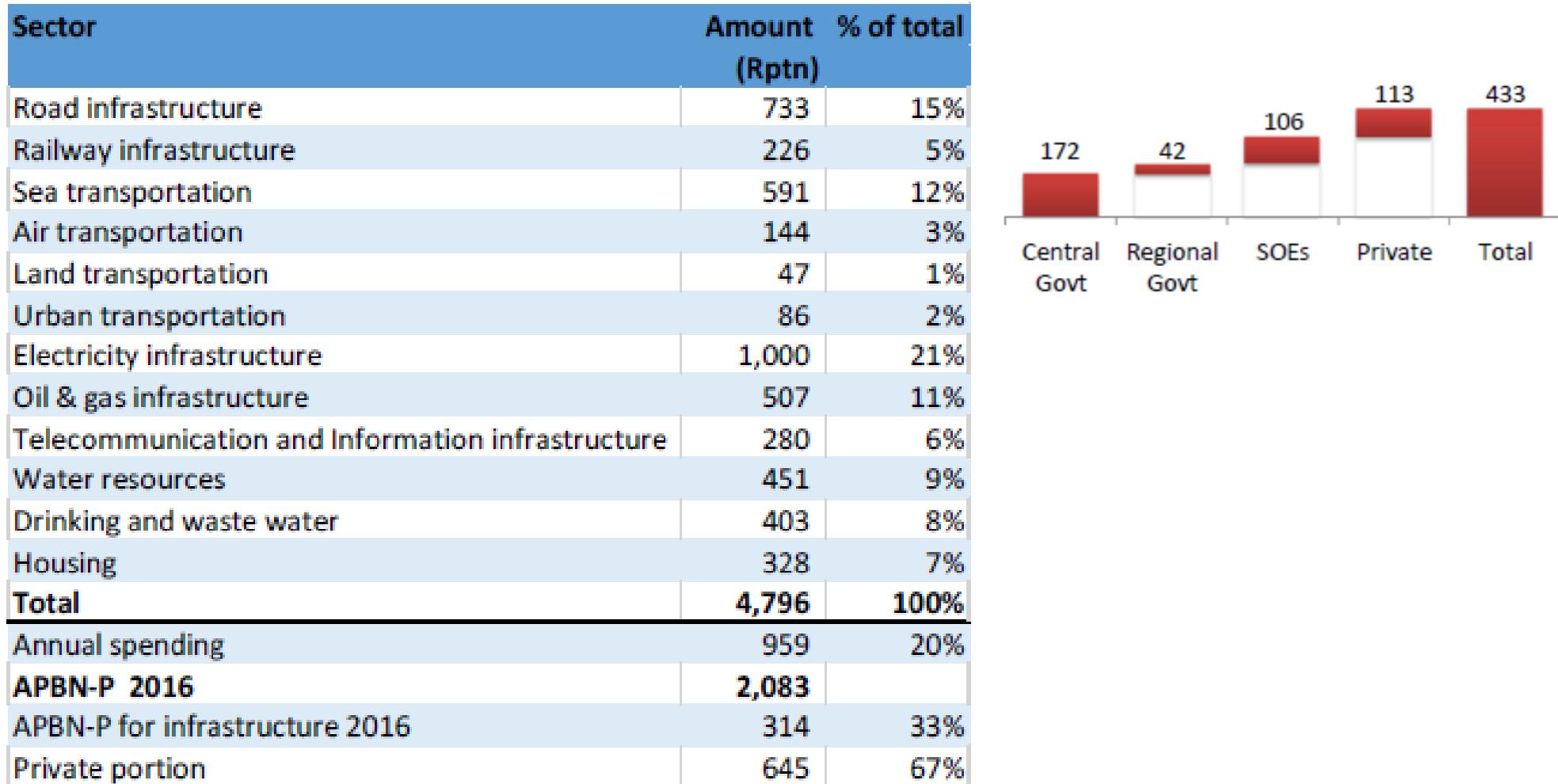


#1

Infrastructure-Driven Economy



Infrastructure Development on All Sectors

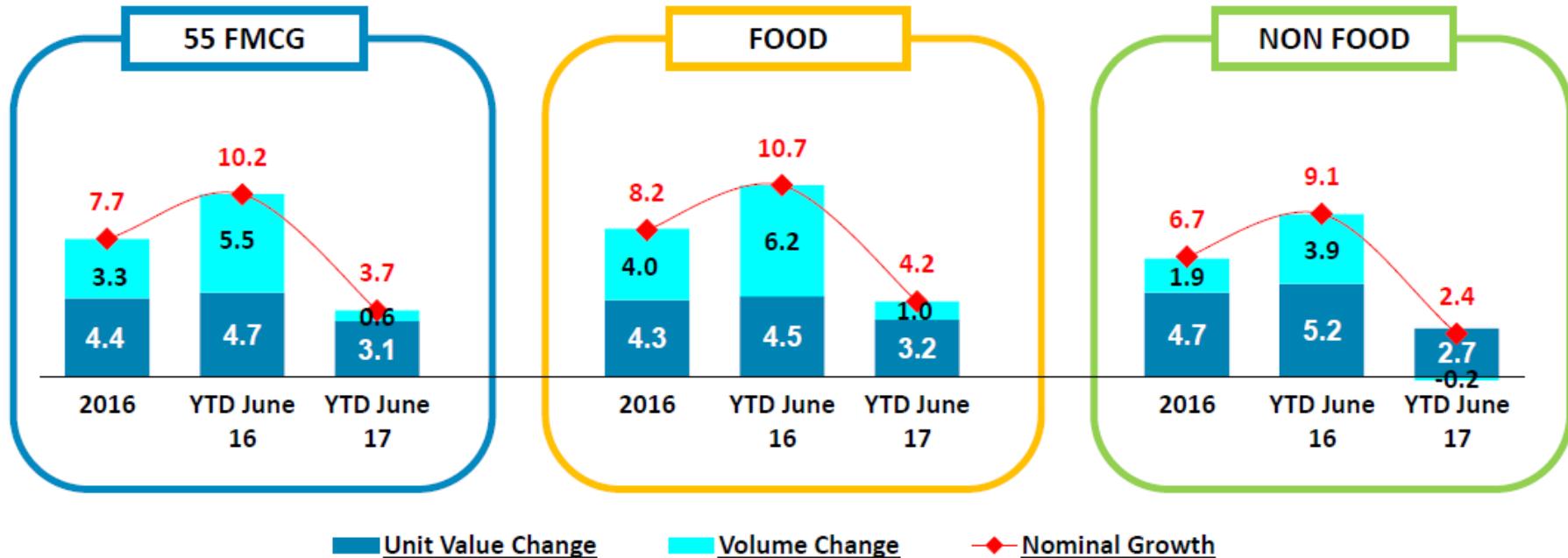




#2

The Down of Goods Economy

Retail Industry Has Decreased

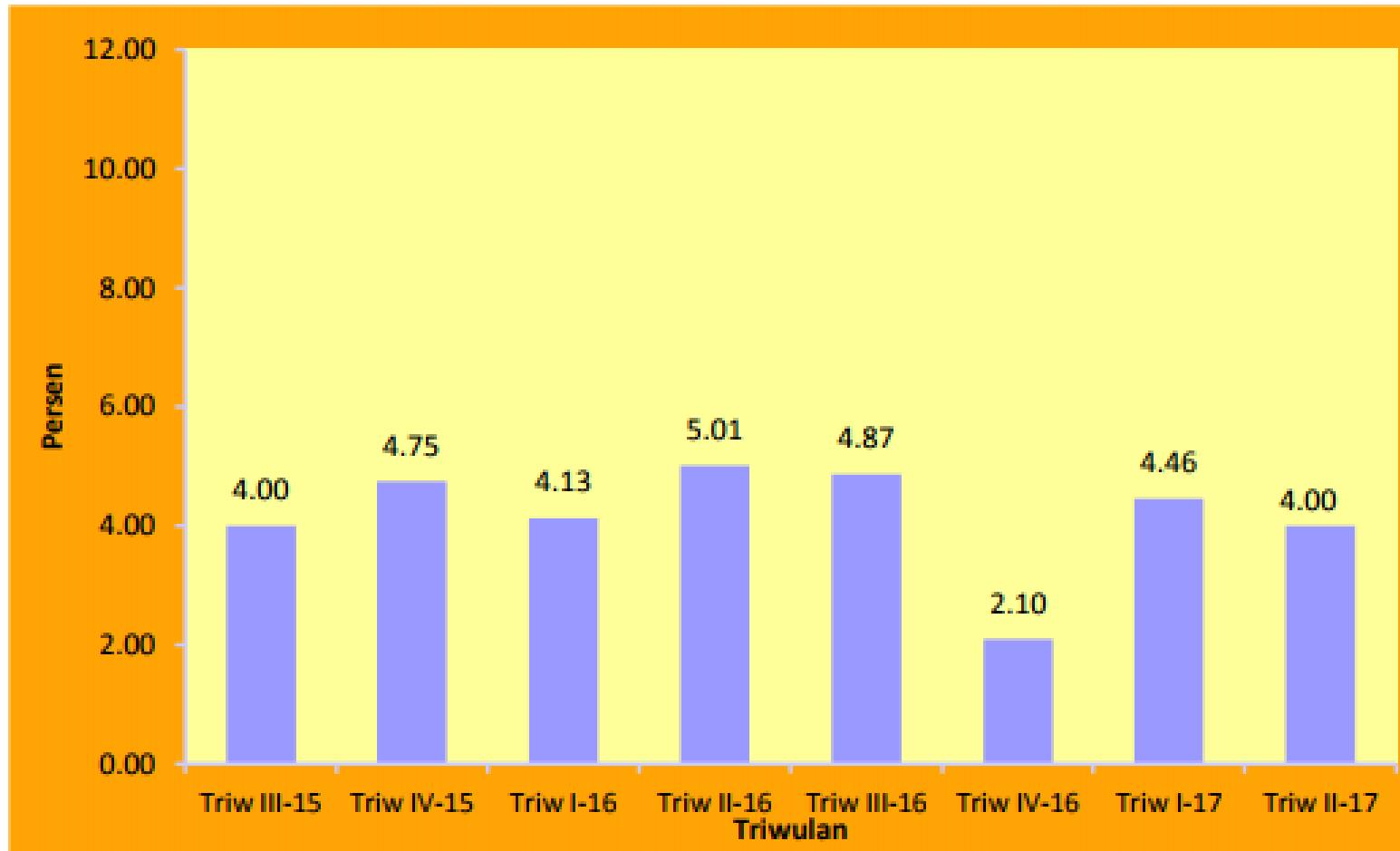


- Instant Noodles
 - Coffee
 - Powder Milk
 - Biscuit
 - Etc.
- Beverages
 - Cooking & Seasoning
 - Breakfast
 - Indulgences
 - Dry Food
- Personal Care
 - Home Care
 - Pharmaceuticals

The Growth of Manufacture Industry is Only 4%

Grafik 10.1

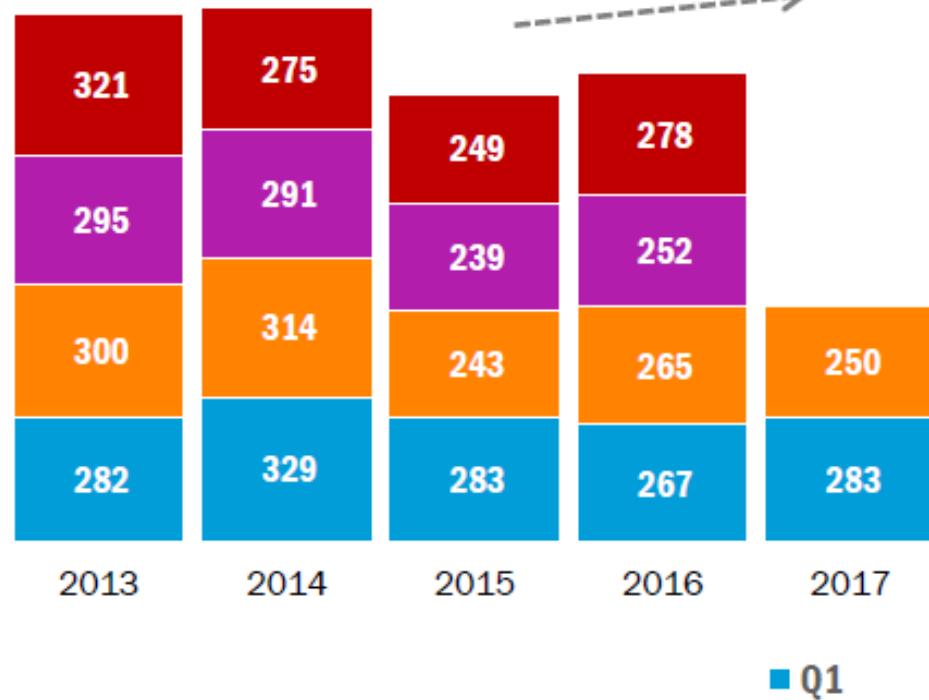
Pertumbuhan Produksi Industri Manufaktur Besar dan Sedang Triwulan (y-on-y)
Triwulan III-2015–Triwulan II-2017



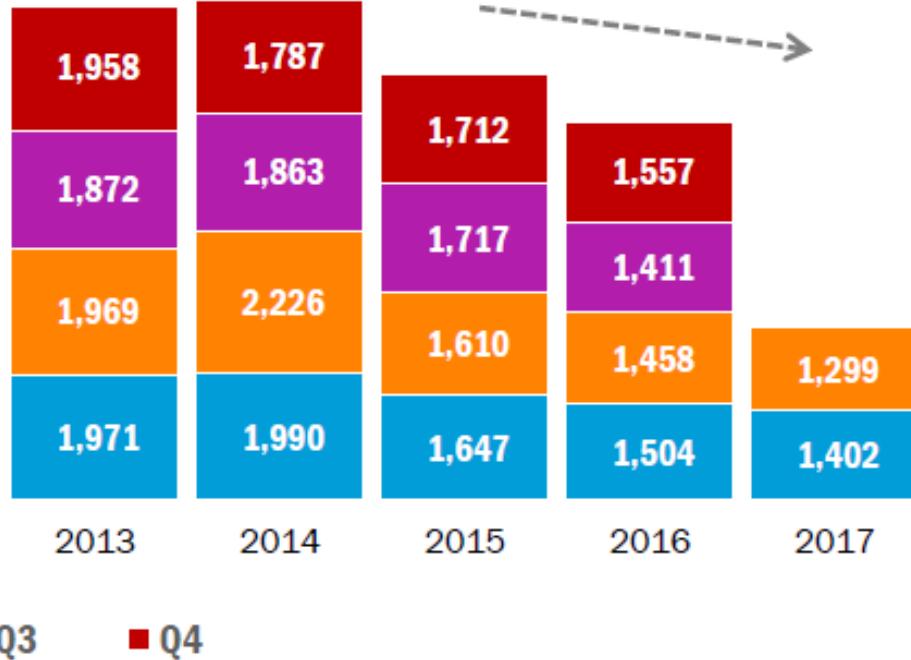
Negative Growth in Automotive Industry



CAR SALES (000 UNIT)



MOTORCYCLE SALES (000 UNIT)



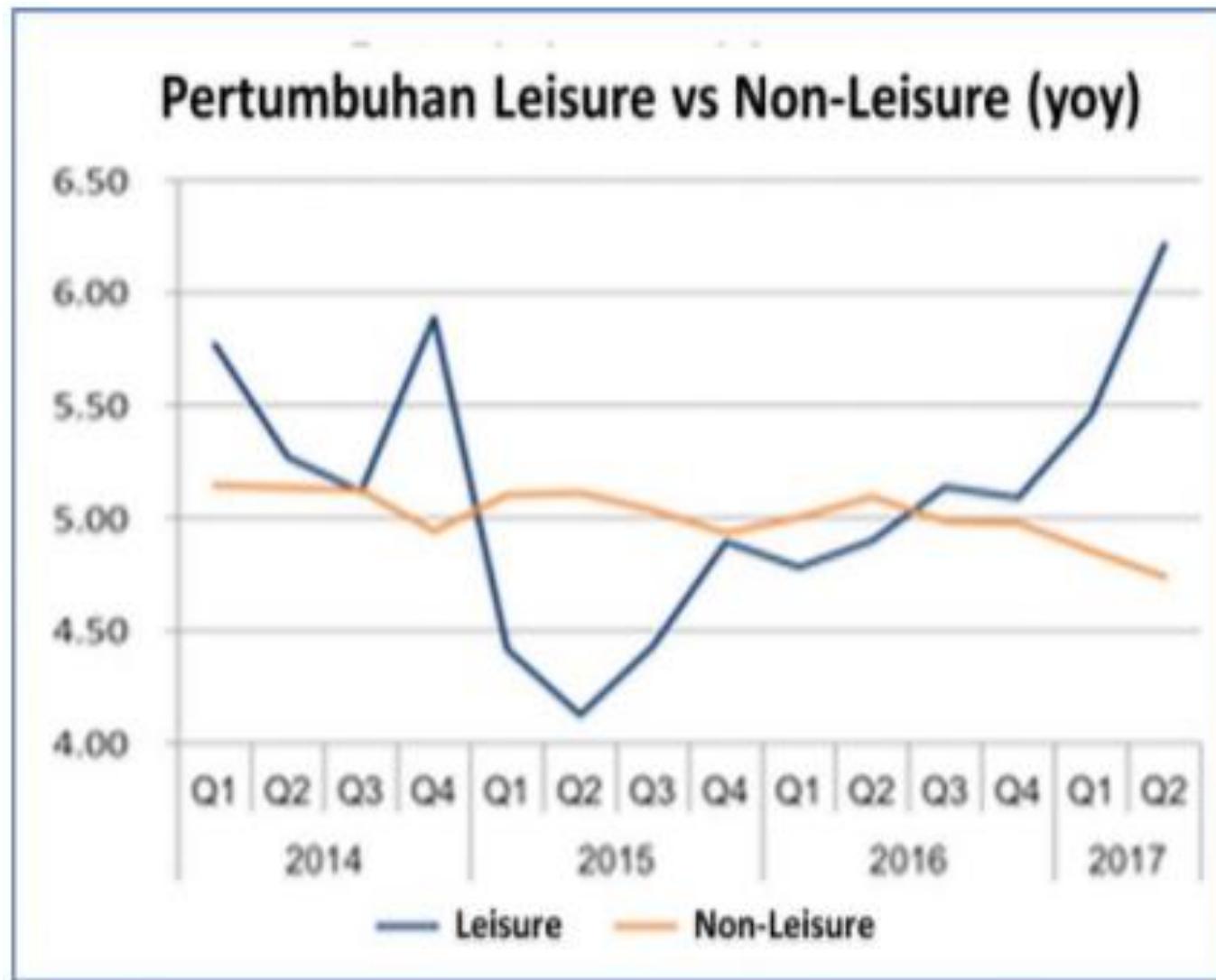


The Rise of Leisure Economy

#3

UNI
QLO

The Shift: From Goods-Based to Leisure Consumption



“Jadi shifting-nya adalah mengurangi konsumsi yang tadinya non-leisure untuk konsumsi leisure,” ucap Ketua BPS, Suharyanto.

GLODOK MULAI SEPI



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The Emergence of Mall Lifestyle

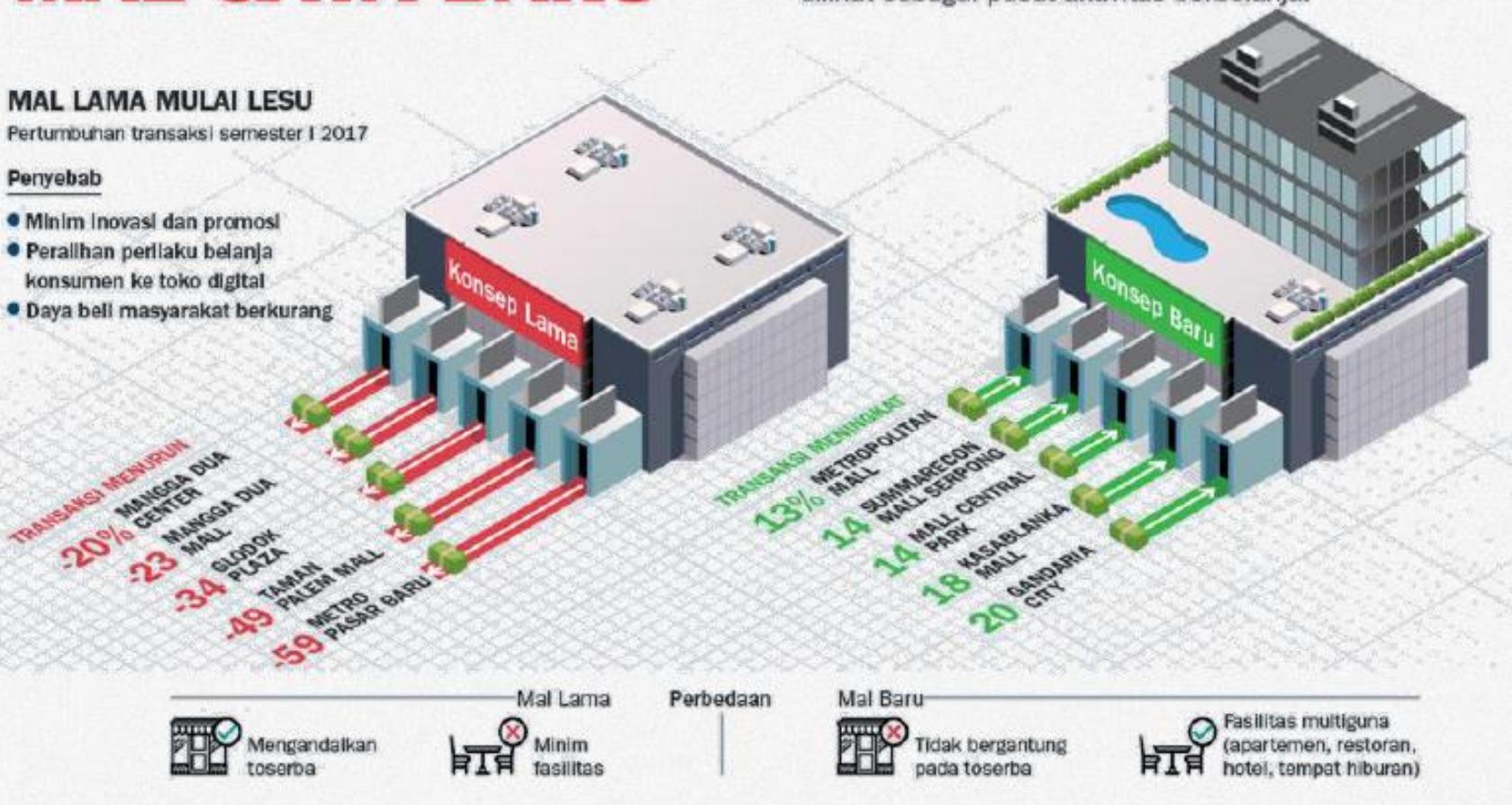
BOSAN YANG LAMA, KONSUMEN PILIH MAL GAYA BARU

MAL LAMA MULAI LESU

Pertumbuhan transaksi semester I 2017

Penyebab

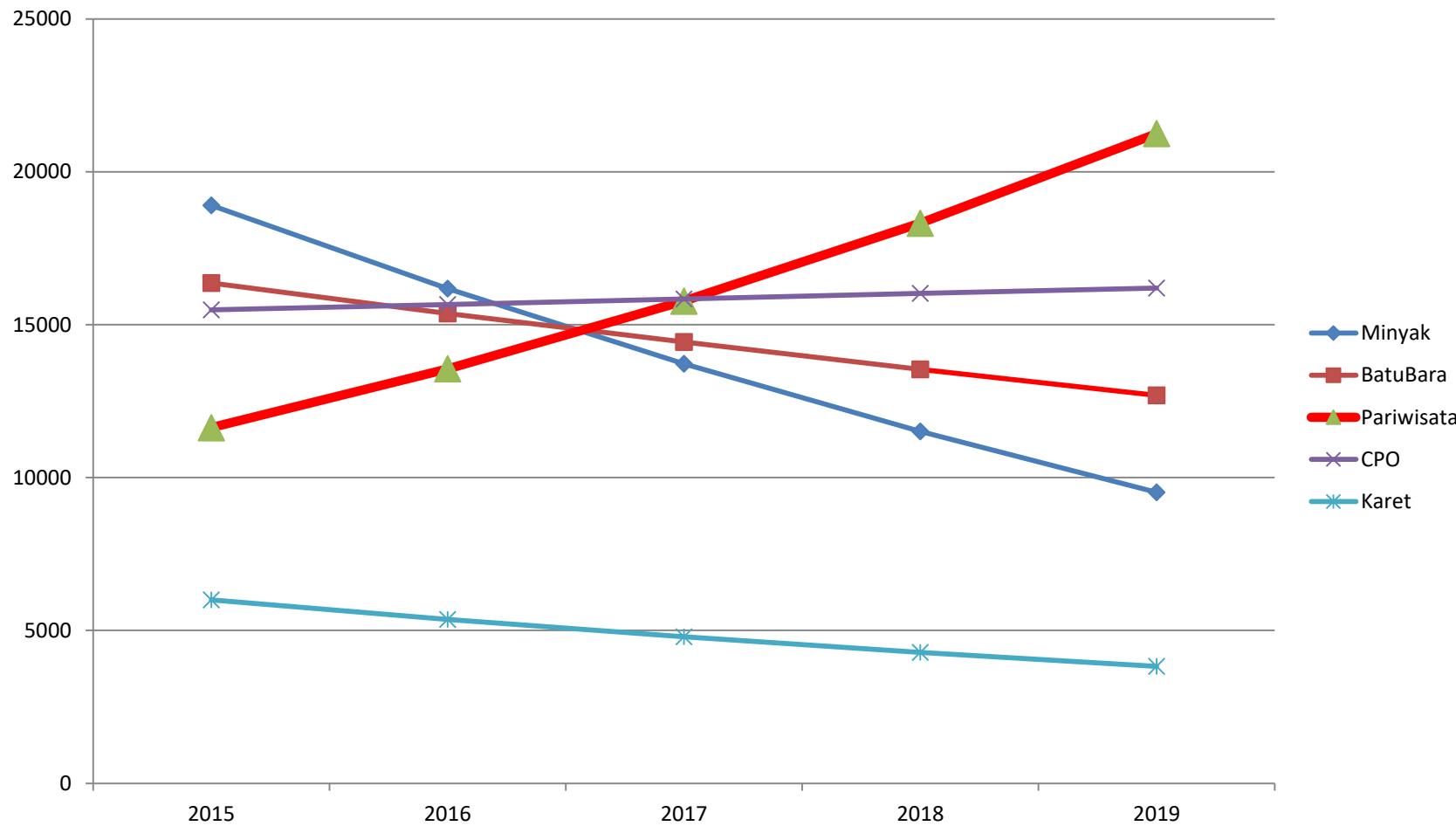
- Minim Inovasi dan promosi
- Peralihan perlaku belanja konsumen ke toko digital
- Daya beli masyarakat berkurang



Tourism Industry Is Growing

PROYEKSI PENERIMAAN DEVISA DARI SEKTOR-SEKTOR UTAMA DALAM PEREKONOMIAN INDONESIA

“Tahun 2020, sektor pariwisata merupakan penyumbang devisa terbesar bagi Indonesia”



Source: Kemenpar, 2015

Liburan menjadi kebutuhan pokok...



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HONG KONG USD 373 nett
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Pertumbuhan Nilai Tambah Transportasi & Hospitality

year on year, percent

	Q1-2017	Q2-2017
Transportation and warehousing	8.03	8.37
Railways transpot	12.30	18.03
Land transport	7.70	8.04
Sea transport	0.85	3.07
River, lake, and ferry transport	7.51	6.57
Air transport	13.23	11.92
Warehousing and support services for transportation, postal & courier	7.29	7.96
Accomodation, food and beverages	4.68	5.07
Accomodation	4.70	4.84
Food and beverages	4.68	5.13

Source: BPS-Statistics Indonesia.

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The 5 Drivers

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Consumption as a Lifestyle

2

From Goods to Experience

3

More Stress, More Travelling

4

Low Cost Tourism

5

Traveloka Effect

01. Consumption as Lifestyle





02. From Goods to Experience

03. More Stress, More Travelling



04. Low Cost Tourism



#1 Low Cost Carrier



#2 Budget Hotel

The poster is for a 'FREE TRAVEL FAIR' organized by detiktravel Indonesia. The top half features the event title 'FREE TRAVEL FAIR' in large, bold, white letters with a red outline, set against a blue background. Below it, the text 'Ini saatnya kamu TRAVELING dengan GRATIS!' is written in a smaller, white, cursive font. The bottom half shows a colorful collage of various international landmarks and travel-related icons, including the Eiffel Tower, the Taj Mahal, the Golden Gate Bridge, and Mount Fuji. At the bottom, a red banner displays the dates '3 - 17 Oktober 2017' and the website 'travel.detik.com'. The footer contains promotional text in Indonesian: 'Ratusan Voucher Menginap di Hotel Gratis • Ratusan Tiket Wisata Gratis • Tour Keluar Negeri Gratis • Tiket Pesawat Gratis • Travel Apparel Gratis'.

detiktravel INDONESIA
HAPPY

FREE

TRAVEL FAIR

Ini saatnya kamu TRAVELING dengan GRATIS!

3 - 17 Oktober 2017 di travel.detik.com

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05. Traveloka Effect

traveloka.com

Situs Boking Tiket Pesawat No. 1 di Indonesia



Thank You