

Indonesia Digital Advertising - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Indonesia Digital Advertising Market size is estimated at USD 3.05 billion in 2024, and is expected to reach USD 4.04 billion by 2029, growing at a CAGR of 5.77% during the forecast period (2024-2029).

Digital advertising is emerging as an effective way for businesses to find new customers and diversify their revenue streams. Digital advertising is cost-effective, as it is pay-per-click and allows users only to pay when someone takes the desired action of their campaign. Furthermore, its targeting capabilities enable the most qualified people to take desired actions.

Key Highlights

The growing proliferation of social media to engage and discover audiences has increased the demand for display ads. Social media ads build brand awareness due to their reach and creative design capabilities. These ads are minimally disruptive and blend well with users' feeds effortlessly, allowing them to be liked, shared, and commented. Such favorable features are driving Indonesia's social media ads segment.

As Southeast Asia's one of the fastest-growing economies, Indonesia presents an opportunity for marketers and advertisers. Most of Indonesia's digital ad bounty is allocated to online search ads, digital banner ads, and digital video ads that offer versatility and precision, empowering advertisers to impact their target audience significantly.

Businesses in Indonesia are embracing the potential of digital platforms, which is crucial

for success in Indonesia's advertising landscape. End-user industries such as travel, tourism, and hospitality are launching campaigns encouraging consumers to rediscover their passion for travel. Tourism Indonesia has unveiled a captivating campaign aimed at a global audience to promote the country's tourism industry.

In Indonesia, digital marketing has been on the rise in the last few years as more and more brands have started to recognize the immense potential of reaching audiences on digital platforms. The COVID-19 pandemic further increased the adoption of digital marketing across varied industries and organizations and encouraged businesses to adopt efficient marketing channels to engage with customers.

B2C services are witnessing significant growth in Indonesia's digital advertising market. Customer purchase behavior has changed, and online shopping is now normal. Increased digital customer presence is encouraging the brands to invest in their marketing spend across all digital channels. The increase in online shopping, virtual events, and digital content consumption is anticipated to boost the demand for digital marketing in Indonesia to reach and engage with audiences effectively.

Indonesia Digital Advertising Market Trends

Video Advertising to Grow at a Significant Rate

The digital advertising market in Indonesia is growing fast, led by programmatic ads and digital spending budget. Rising trends in the use of video ad media formats are one of the key drivers of developing programmatic ads in digital advertising in Indonesia. Growth in programmatic video ad spending is anticipated to make it the country's fastest-growing market for video formats.

The increase in Indonesian telecommunications company Telkomsel's video consumption data is anticipated to boost the popularity of video formats in Indonesia. According to the MMA Indonesia Mobile Ecosystem Report, video data consumption can reach 33% of Telkomsel's total data consumption. Therefore, video format has become the main driver for developing digital advertising expenditure.

Indonesia is emerging as the fastest-growing market in the world for video ad formats. Videos are essential tools in mobile app marketing. In recent years, in-app video advertising has evolved into one of the most effective methods of advertising mobile apps, and more and more companies are reaping the benefits of in-app video marketing.

Indonesia is witnessing a surge in in-app video advertising usage on mobile devices. The shift to online is growing due to user-generated content, social video, and various forms of premium video-on-demand, including freemium and SVOD platforms.

Improvements in the quality of local content have helped drive user acquisition and engagement in Indonesia. YouTube and TikTok dominate viewership on mobile. YouTube also remains the leader in the VOD category in revenues, though TikTok is increasing its share, and Netflix leads SVOD. Global OTT players dominate the online video space in Indonesia. In terms of the number of paying subscribers, Disney+ Hotstar leads the way, followed by Vidio, Viu, and Vision, among others.

Media and Entertainment End-user Industry to Account for a Substantial Market Share

According to Meltwater, a software company, Indonesia's vibrant digital economy is growing due to the rise of new startups and tech companies catering to the growing needs of Indonesian internet users. In Indonesia, the evolving digital media landscape presents exciting possibilities for companies and brands. The amount of people using the Internet is growing steadily in Indonesia, making it one of the largest Internet markets in the world.

The rising automation in the entertainment industry, such as moving objects, lighting technology, AV and media technology, and building automation, has led to the increased demand for PC-based control. Technological advancements have made PC-based control technology suitable for implementing technically sophisticated stage and media shows, propelling the segment's growth.

Companies in Indonesia are focusing on advertising revenue despite the presence of companies such as Google and Facebook. For instance, IDN Media is a media platform company in Indonesia. It provides a wide variety of compelling content and marketing and support for the advertisers. IDN provides digital media with its branding, theme, and content in a single platform called IDN App. This includes news and entertainment, fashion and beauty, esports, cooking, and other topics whose audience sufficiently attracts advertisers and sponsors.

Media and entertainment companies in Indonesia strive to bridge the information gap. Companies are utilizing digital advertising to provide everyone in Indonesia with access

to quality information. Media platform companies offer news and entertainment, fashion and beauty, parenting, esports, cinema, and out-of-home (outdoor) advertising to connect all the users in the ecosystem, plugging everything into their advertising system to generate revenues.

Market vendors are exploring new offerings, such as combining out-of-home (outdoor) and creative marketing platforms with their other businesses to provide a 360 solution to the client. They are also creating a super app for content, a one-stop media platform for content creation and content distribution, to grow and be more sustainable.

Indonesia Digital Advertising Industry Overview

The Indonesian digital advertising market is fragmented because of the presence of several companies. Some key players are Accenture, Microsoft, Hewlett Packard Enterprise Development LP, Oracle, Intel Corporation, Google LLC, Amazon Web Services Inc., and SAP SE. Players in the market are introducing innovative solutions and forming partnerships to gain competitive advantages. For instance,

In December 2023, with the growth in the advertising landscape in Indonesia, Aspire, Meta, and Bank Aladin collaborated to empower small and medium enterprises (SMEs) in Indonesia by offering productive loans in the form of credits. The collaboration enables businesses to tap into the vast potential of digital advertising on platforms like Facebook and Instagram. Many smaller internet marketers need help paying for their Meta campaigns with traditional cards, leading to delays in their campaign efforts. The collaboration between Aspire and Meta will allow the Aspire Card to be accepted as a payment method within the Meta platform.

In June 2023, Thoughtful Media Group Inc. (TMG), a social commerce-focused, premium digital advertising network of Society Pass Incorporated (SoPa), acquired Newave, an Indonesia-based KOL management agency. With Newave onto TMG's ever-expanding TMG regional platform and merging Newave's dominant position in the nano and micro-influencer space with TMG's social commerce-focused ecosystem, the firm will provide additional channels for brands to market their products and services.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Contents

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.2.1 Bargaining Power of Buyers
 - 4.2.2 Bargaining Power of Suppliers
 - 4.2.3 Threat of New Entrants
 - 4.2.4 Threat of Substitutes
 - 4.2.5 Intensity of Competitive Rivalry
- 4.3 Industry Value Chain Analysis
- 4.4 Assessment of Macro-economic Factor and its Impact on the Market

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Ongoing Shift from Traditional to Online Advertising
 - 5.1.2 Increasing Use of Recommendation Engines
- 5.2 Market Restraints
 - 5.2.1 Lack of Communication Between Publisher and Advertiser

6 MARKET SEGMENTATION

- 6.1 By Type
 - 6.1.1 Audio Advertising
 - 6.1.2 Video Advertising
 - 6.1.3 Influencer Advertising
 - 6.1.4 Banner Advertising
 - 6.1.5 Search Advertising

- 6.1.6 Classifieds
- 6.2 By Platform
 - 6.2.1 Desktop
 - 6.2.2 Mobile
- 6.3 By Industry
 - 6.3.1 FMCG
 - 6.3.2 Telecom
 - 6.3.3 Healthcare
 - 6.3.4 Media and Entertainment
 - 6.3.5 Other Industries
- 6.4 By Region
 - 6.4.1 Java
 - 6.4.2 Sumatra
 - 6.4.3 Kalimantan
 - 6.4.4 Other Regions

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
 - 7.1.1 Accenture
 - 7.1.2 Microsoft
 - 7.1.3 Hewlett Packard Enterprise Development LP
 - 7.1.4 Apple Inc.
 - 7.1.5 IBM Corporation
 - 7.1.6 Oracle
 - 7.1.7 Intel Corporation
 - 7.1.8 Google LLC
 - 7.1.9 Amazon Web Services Inc.
 - 7.1.10 SAP SE

8 INVESTMENT ANALYSIS

9 MARKET OPPORTUNITIES AND FUTURE TRENDS

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