

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

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## Abstracts

The Indonesia Digital Media Market size is estimated at USD 2.64 billion in 2024, and is expected to reach USD 3.52 billion by 2029, growing at a CAGR of 5.92% during the forecast period (2024-2029).

Digital media is the sharing of information through a digital device. Digital media solution providers offer technology-enabled, data-driven digital performance advertising solutions to connect consumers and advertisers. Companies are offering brand-direct and marketplace campaigns to increase consumer access to products, services, promotions, and savings by delivering the right message to the right person at the right time and place.

### Key Highlights

Growing demands for marketplace solutions that engage consumers with creative brands have increased the demand for digital media. There is a rising demand for digital performance advertising solutions such as managed services and a suite of proprietary SaaS technology that connect consumers and advertisers.

The digitization has catalyzed the development of diverse and independent media in Indonesia. Market reforms have led to a radical increase in media outlets, such as television channels and commercial radio stations populated by established brands and new entrants. The rise of the internet and digital technologies transformed the media landscape in Indonesia. The digital revolution brought the rise of online media outlets, providing diverse perspectives.

The Indonesian government passed the Personal Data Protection (PDP) Law to protect personal data and establish obligations for organizations handling such information. Safeguarding digital privacy is crucial for dignity and freedom of expression, and digital media can raise awareness and promote responsible practices.

ABC International Development (ABCID) is supporting the Indonesian media sector through the Indonesia Media Development Program, which enhances digital safety and resilience. The goal is to ensure Indonesian digital media's safety and resilience in a rapidly evolving digital landscape.

The COVID-19 pandemic impacted digital marketing as companies that previously promoted conventionally had to change their marketing method to digital. The pandemic accelerated digital transformation in Indonesia. With systems and methods switched to online after previously using conventional systems, digital media solution providers are creating an efficient advertising ecosystem by providing consumers with access to promotions and clients to connect with high-intent consumers.

## Indonesia Digital Media Market Trends

### Digital Video Games to Witness Significant Growth

Online gaming technology and player preferences have given rise to profound transformations in the Indonesian digital video games market. The country is embracing the future of digital gaming, and industry players are expected to embark on a journey of innovation and evolution. In Indonesia, digital video games have become increasingly popular among all age groups. The introduction of mobile video games has allowed smartphones to operate the most popular games efficiently. As a result, the Indonesian digital video game market is getting bigger, giving rise to local and foreign game developers to expand their footprint in Indonesia.

Trends of cloud gaming are increasing, allowing users to play video games without the need for consoles or installations. These games run on remote servers and are accessed via an app. Cloud gaming represents a shift in the Indonesian digital video games industry because players no longer require high-end hardware to enjoy resource-intensive games. Game developers are leveraging this aspect to reach new markets effectively.

Another major trend is the rise of e-sports, which ranks alongside music and film as one of the major players in entertainment. The growth of the e-sports industry in Indonesia

can be attributed to mainstream awareness of e-sports (and video games in general) among the people, which led to the rising demand and rapid growth in the e-sports market.

According to GSMA Intelligence, The Mobile Economy Asia-Pacific 2023 report, Indonesia ranks among the top three smartphone markets in Asia-Pacific. In Indonesia, video and online gaming are among the top services and content utilized by 5G users. For instance, Telkomsel's Dunia Games, the leading e-sports organizer in Indonesia, holds the Dunia Games WIB Championship, attended by over 45 professional teams and over 14 million online viewers.

In Asia-Pacific, video game developer Riot Games Inc. regained publishing rights to the League of Legends and Teamfight Tactics PC. The company announced the launch of Teamfight Tactics (TFT) Mobile in Indonesia and plans to introduce Riot's third self-published mobile title in the country and the region, joining Legends of Runeterra and League of Legends: Wild Rift in its stable mobile game offerings.

### Rise of Video-on-demand Propelling Growth

Video on demand (VOD) refers to video broadcasting via over-the-top (OTT) applications. The proliferation of connected devices, such as mobile phones, TVs, tablets, desktop PCs, and laptops, increased access to video content via OTT applications in Indonesia. The rise of reliable internet connection provides an experience with significantly improved sound and visual quality.

Growing internet usage in Indonesia, particularly among mobile users, altered consumer preferences about entertainment consumption. The growing popularity of Netflix in Indonesia results from rising internet penetration. Netflix streaming service is one of the biggest OTT providers with a subscription model. Most Indonesians prefer streaming video-on-demand services and contribute a sizable amount of OTT service revenue.

The COVID-19 pandemic accelerated online entertainment, increasing demand for streaming video-on-demand (SVOD). Customers manage cost concerns by adopting ad-supported options, looking for discounts, and moving on and off services to meet their content needs. The increasing use of VOD in industries such as entertainment, education and training, network video kiosks, online commerce, digital libraries, and others is driving the growth of the VOD market across Indonesia.

Indonesia has witnessed a significant increase in the number of people consuming streaming services, both paid and free. Paid VoD services, such as Netflix, HBO, Prime Video, and Apple TV, witnessed the most growth. More away-from-home activities further boosted the demand for paid or free video streaming services, resulting in increased demand for video streaming services on smartphones.

## Indonesia Digital Media Industry Overview

The Indonesian digital media 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, Accenture announced the acquisition of media and marketing technology company Jixie, integrating Jixie's intelligent digital marketing platform and team into Accenture to strengthen its marketing transformation capabilities to deliver more personalized experiences to Indonesian clients. Integrating Jixie's platform into Accenture Song's marketing capabilities will help clients optimize customer data into actionable insights and securely capitalize on Indonesia's fast-growing digital economy.

In December 2023, TikTok announced that it would invest USD 1.5 billion in an e-commerce unit of Indonesia's GoTo Gojek Tokopedia to restart its online shopping business in the country. Under the deal, TikTok will buy 75.01% of Indonesia's biggest e-commerce platform, GoTo's Tokopedia, for USD 840 million and inject TikTok Shop's Indonesia business into the enlarged Tokopedia entity. The partnership is expected to commence with a pilot period in close consultation with and supervision by the relevant regulators.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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