



E-COMMERCE INDONESIA

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Dialogue Series IV on
Information, Communication,
Technology & E-Commerce –
Indonesia Services Dialogue



DISCLAIMERS

Unless otherwise stated; figures, graphics, illustration and other statistical numbers are based upon APJII's Q4-2014 Internet yearly survey conducted in cooperation with The University of Indonesia.

INDONESIA'S FACTS

Only **40%** population in Indonesia has **bank accounts**,
but **85%** population has **mobile phone**



Browsing on mobile phone accounts to **661 pages** per month per person
Highest in the world

Mobile advertising impression is **#2 highest in the world**

Source: SES Jakarta, 2014

INDONESIA INTERNET USERS



USER DISTRIBUTION & PENETRATION

JUMLAH PENDUDUK



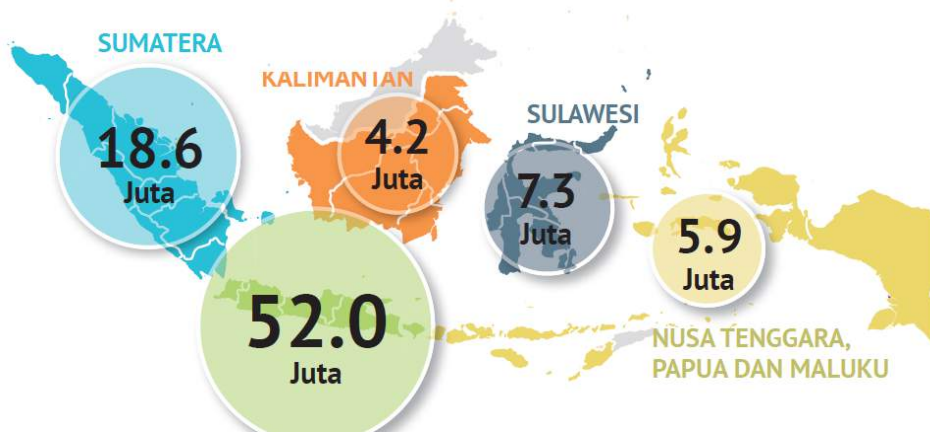
JUMLAH PENGGUNA INTERNET



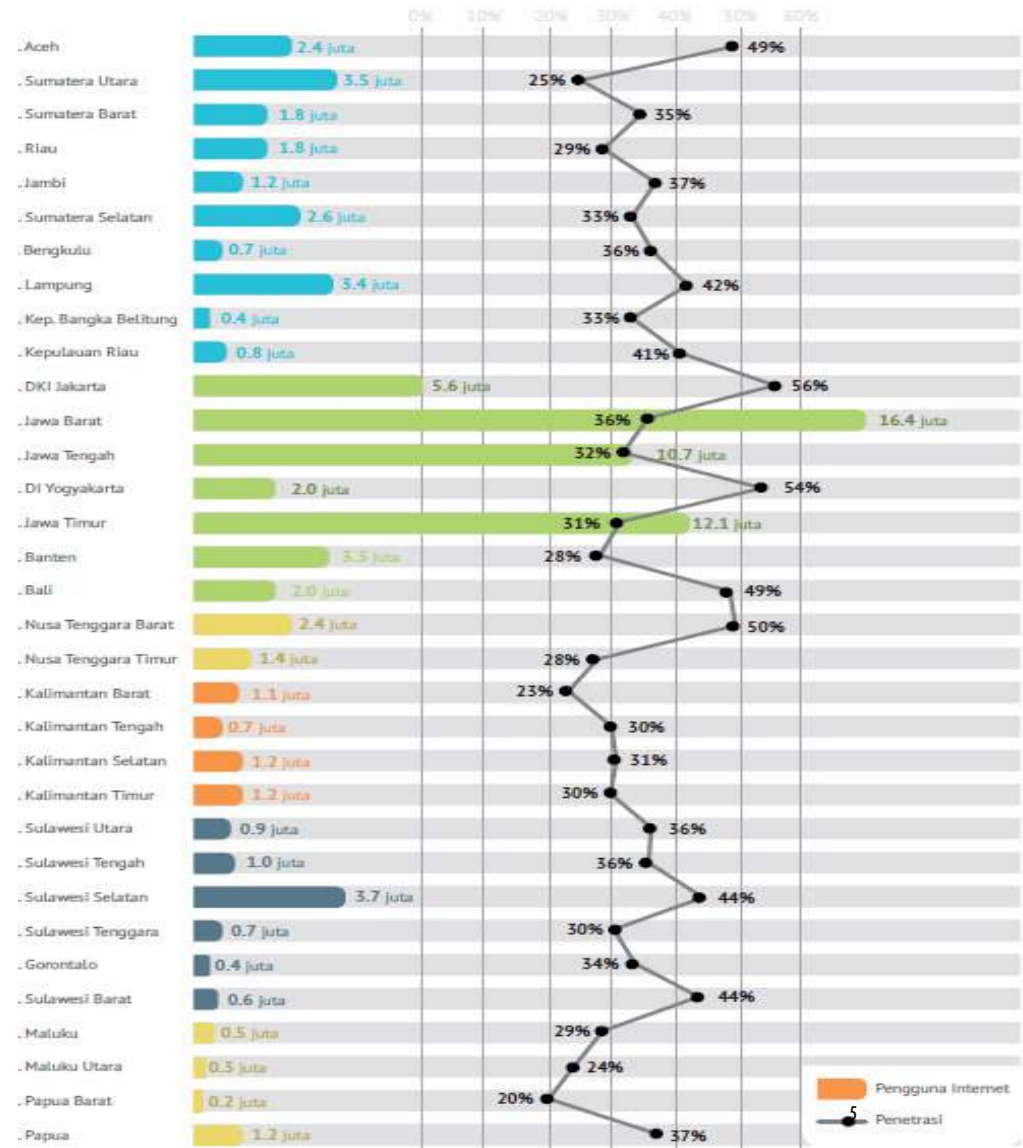
PENETRASI



Jumlah Pengguna Internet berdasarkan wilayah di Indonesia



Penetrasi Pengguna Internet

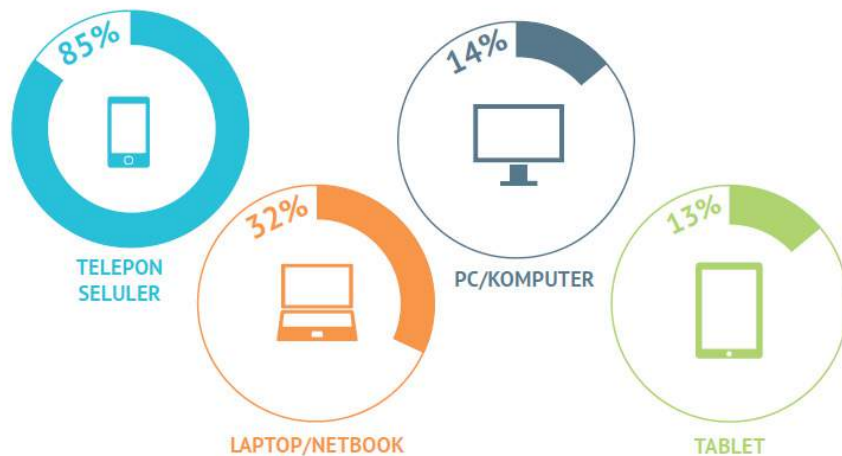


INDONESIA MOBILE INTERNET USERS



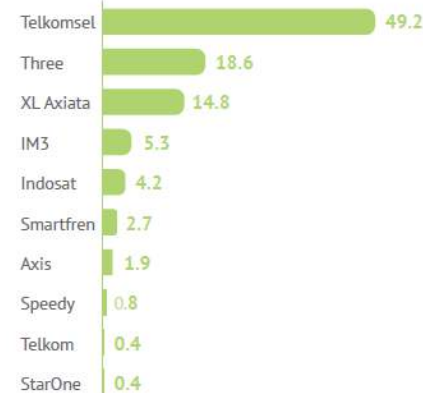
Sebagian besar pengguna internet Indonesia mengakses internet dengan menggunakan Telepon Seluler

Perangkat yang digunakan untuk akses Internet*

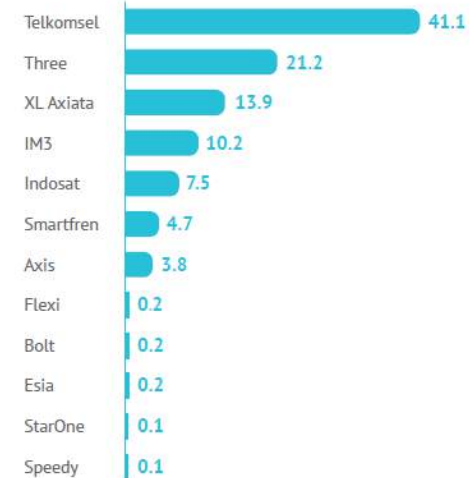


* Pada survei ini, responden bisa memberikan lebih dari satu jawaban

Tablet



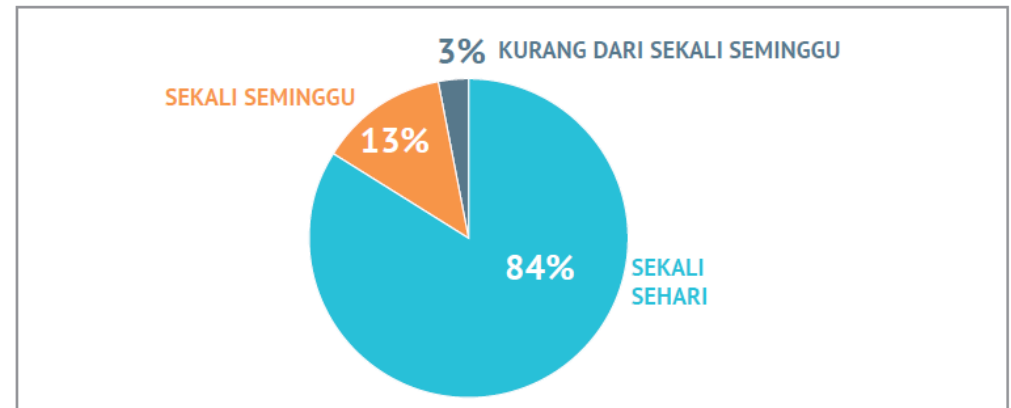
Telepon Seluler



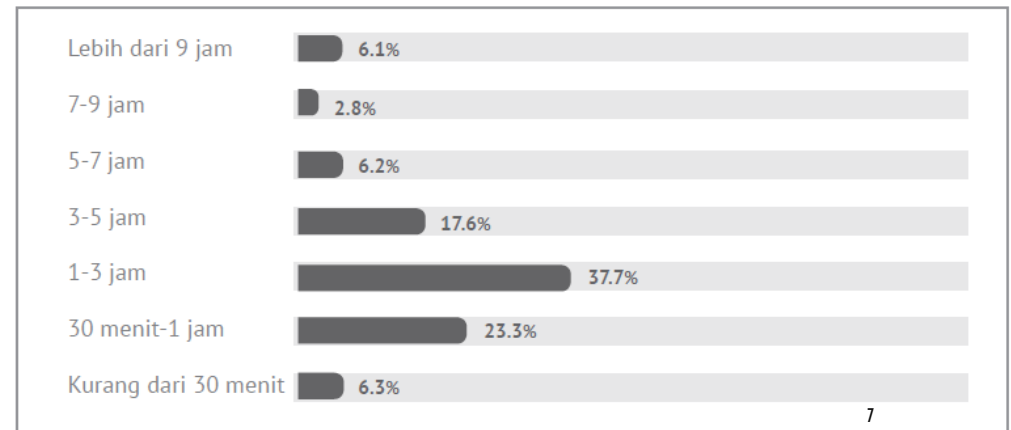
HOW ACTIVE THEY ARE ?

But less than half of Indonesia's internet users spend 3 hours or more online each day, and form an important segment of online shoppers, according to the market research company Markplus Insight. In Vietnam, a smaller e-commerce market, some 62% of internet users spend an average of 3 hours or more surfing the web a day. And average time spent online among China's 618 million internet users is already 3.6 hours.

FREKUENSI MENGGUNAKAN INTERNET



LAMA MENGAKSES INTERNET



E-COMMERCE IN INDONESIA

Estimated B2C eCommerce Sales by Country 2013-2016 (in billion)

	2013	2014	2015	2016
	\$ 181.62	\$ 274.57	\$ 358.59	\$ 439.72
	\$ 118.59	\$ 127.06	\$ 135.54	\$ 143.13
	\$ 18.52	\$ 20.24	\$ 21.92	\$ 23.71
	\$ 16.32	\$ 20.74	\$ 25.65	\$ 30.31
	\$ 1.79	\$ 2.60	\$ 3.56	\$ 4.89

Source: Insideretail

Online Sales vs Retail Sales in Indonesia

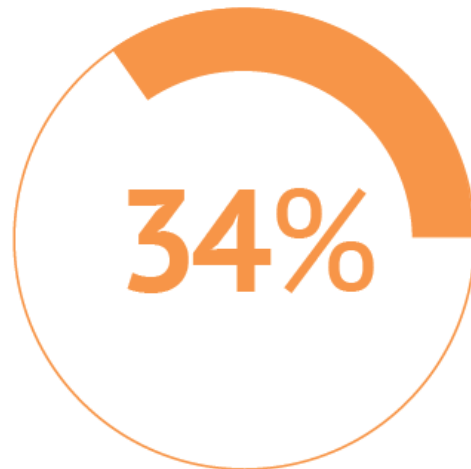
Year	Online Sales Estimate (USD)	Retail Sales Estimate (USD)	Online Sales As a Percentage of Retail Sales
2013	\$1.8 billion	\$363.42 billion	0.5%
2014	\$2.6 billion	\$411.29 billion	0.6%
2015	\$3.56 billion	\$473.91 billion	0.7%
2016	\$4.49 billion	\$543.07 billion	0.8%

Source: Statista

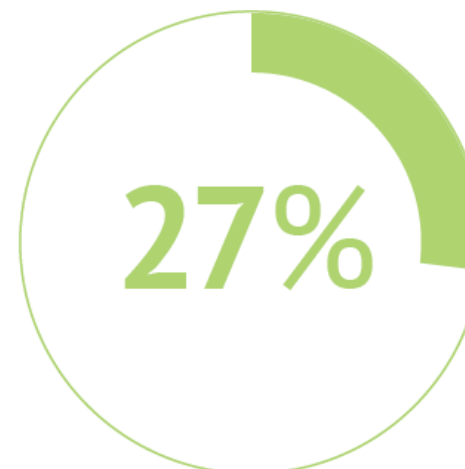
ONLINE SHOPPING – BUYER SIDE



Mencari informasi di Internet mengenai jasa/produk yang akan dibeli



Pengguna Internet yang pernah berbelanja online



**23 mio
Online
Shoppers**

WHAT TO PURCHASE ONLINE

KEINGINAN UNTUK MEMBELI PRODUK ATAU JASA SECARA ONLINE
DALAM ENAM BULAN KE DEPAN (TOP 5 TERATAS)

INDONESIA

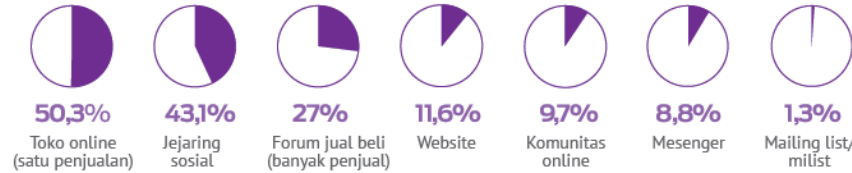


Sumber: Nielsen Global Survey of E-Commerce, Q1 2014

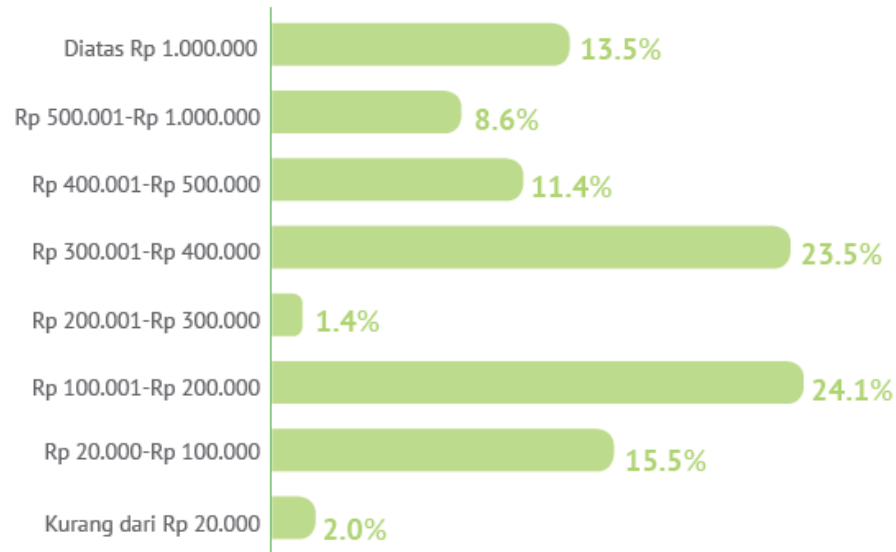
BUYING ONLINE



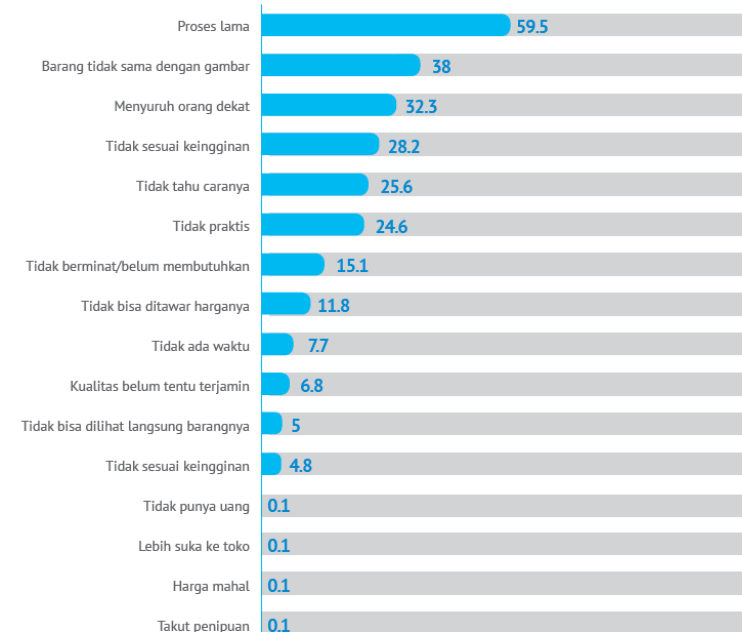
Jenis situs belanja online



Jumlah transaksi pembelian online dalam 3 bulan terakhir



Alasan tidak melakukan pembelian online

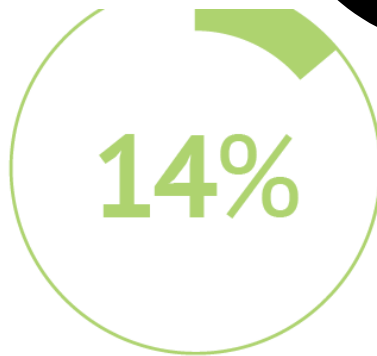


SELLING ONLINE

**12 mio
Online
Sellers**



Pengguna Internet yang pernah berjualan online



Jenis situs untuk berjualan online



Jejarang sosial



Messenger



Komunitas online



Toko pribadi dalam bentuk blog

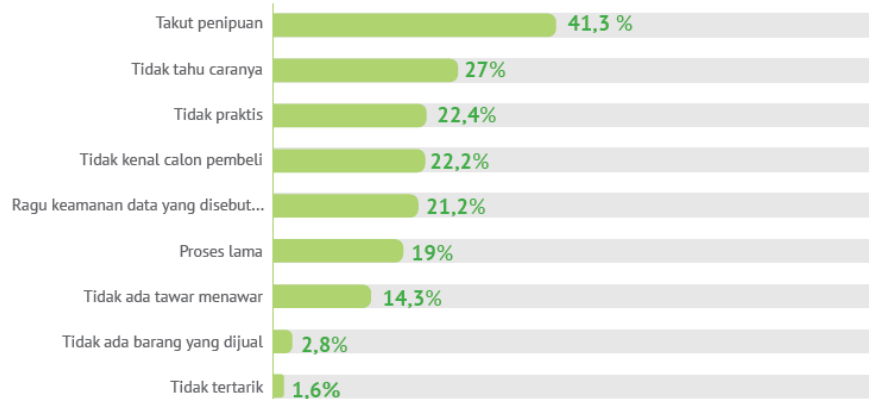


Toko pribadi dalam bentuk website

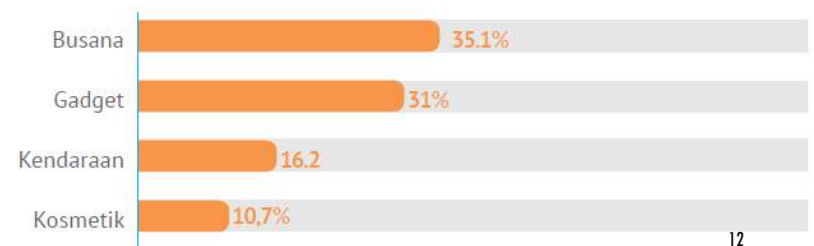


Mailing list/milist

Alasan tidak melakukan penjualan online

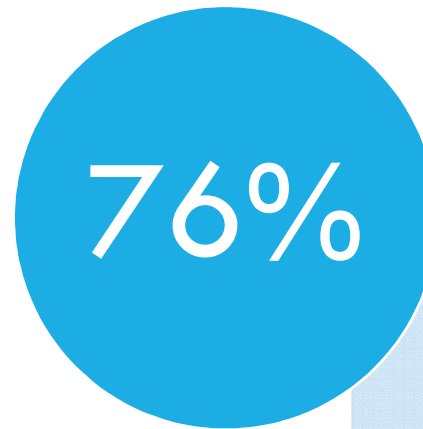


Produk yang dijual online

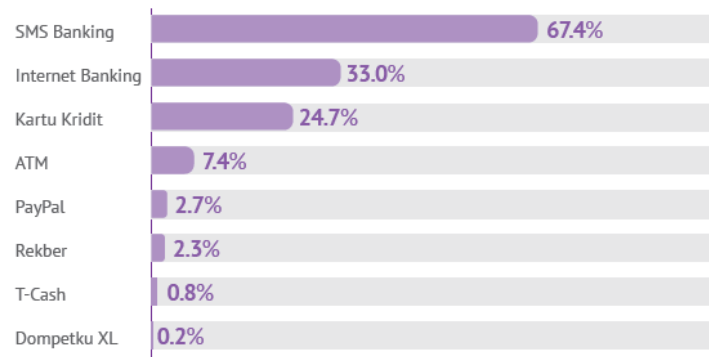


HOW TO PAY OR TO GET PAID ONLINE

Pengguna Internet yang memiliki alat transaksi elektronik

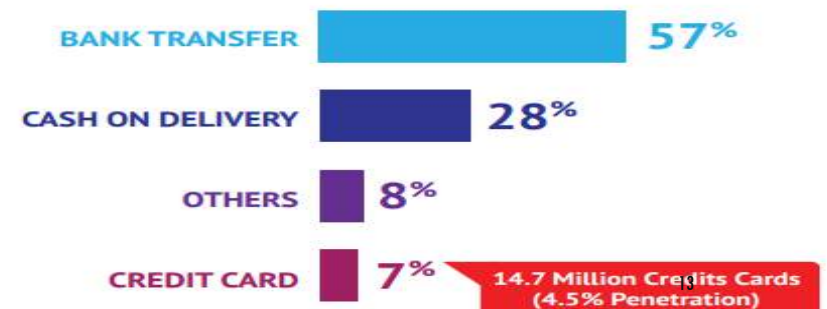


Alat transaksi elektronik yang digunakan pengguna internet



Bank Transfer
Cash on Delivery

Breakdown Of Payment Methods in Indonesia (2013)



STRONG GROWTH AHEAD, YET ISSUES TO SOLVE

Payment Issues

- “Transaction Facilitated, not necessarily completed online”
- 28% COD
- 57% Bank Transfer
- 7% CC
- 8% others
- Innovative Payment Method

Logistics Issues

- Better logistic infrastructure , IT System upgraded
- E-Comm verticals, tighter geographic focus

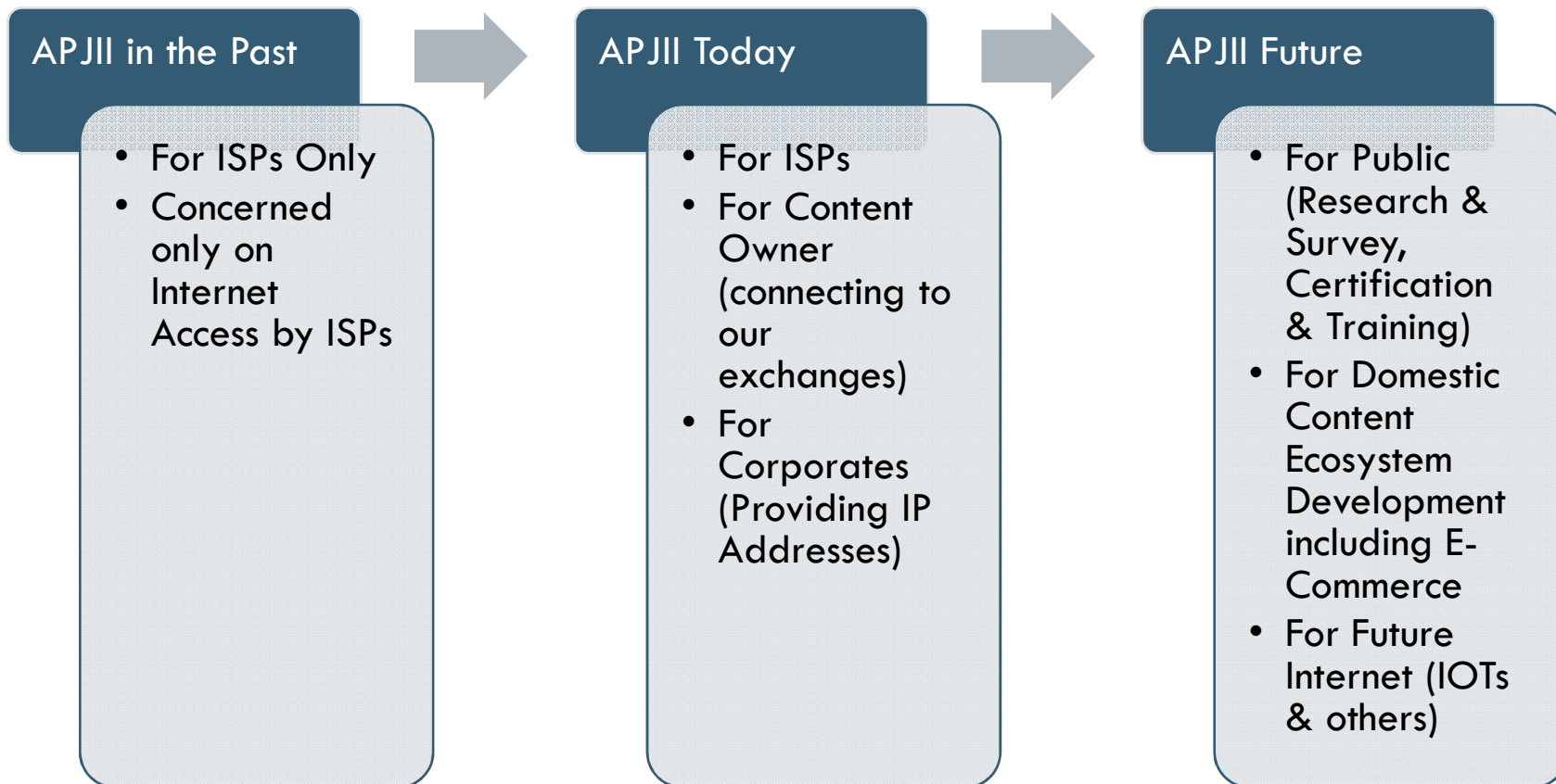
Unique Business Mix

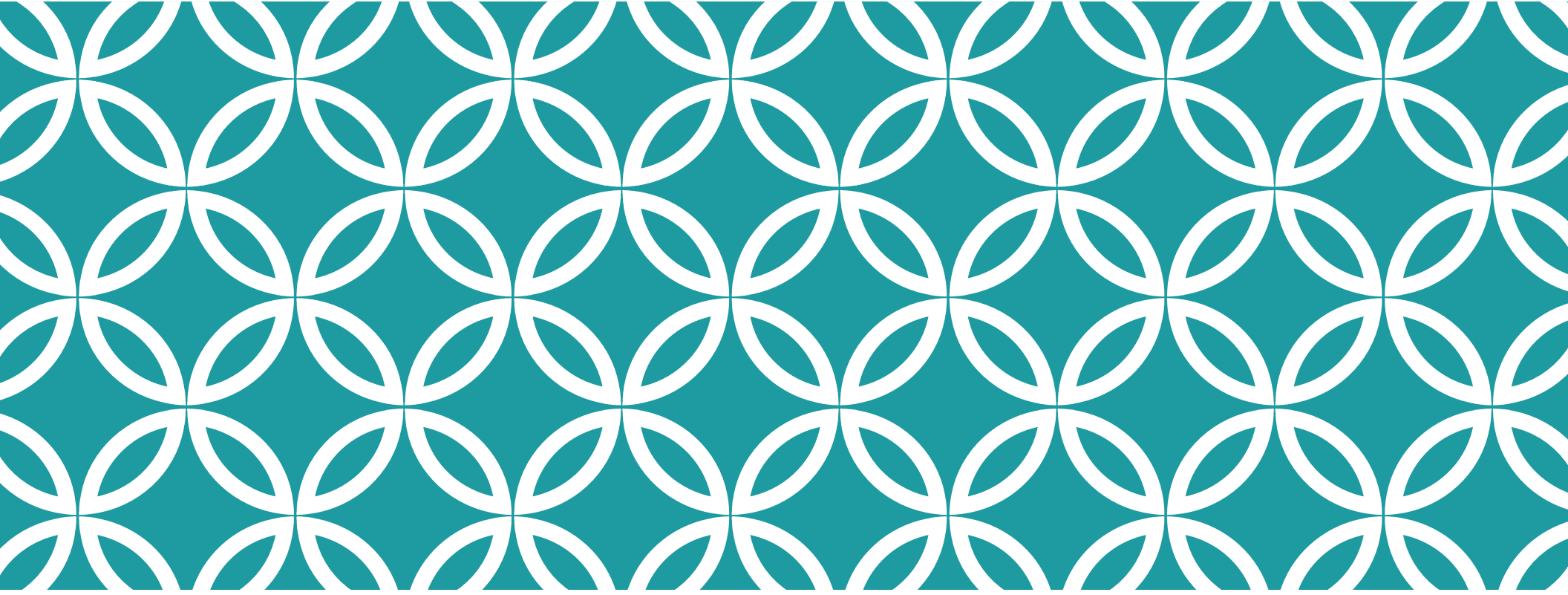
- SMB : 99% of companies
- 40 mio SMBs
- Lack of Tech Expertise
- Still looking for ID’s Alibaba

E-COMMERCE : KEY TO SUCCESS



APJII'S NEW DIRECTION





THANK YOU

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