



BRAND SAFETY & MARTECH

R E P O R T 2 0 2 5

FOREWORD

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The MMA Indonesia Brand Safety & MarTech 2025 Industry Report offers marketers and business leaders a roadmap to future-proofing their strategies. From AI content pipelines to real-time customer engagement, from ethical governance to platform monetization models, it brings together deep insights and expert perspectives to help navigate the digital frontier.

Digital transformation has acquired dimensions beyond just competitive advantage; it is the default setting for business survival in 2025. In Indonesia, where internet penetration exceeds 77% and mobile-first behavior dominates, AI is the beating heart of marketing. The Indonesian AI market, projected to grow at a CAGR of 26.28% and reach USD 12.06 billion by 2031.¹

Another rapidly evolving aspect of modern marketing is the creator economy—fueled by Gen Z and Millennial audiences. In Indonesia, influencer ad spending is projected to grow by USD 257.35 million in 2025.² But reach alone is no longer the metric.

At the same time, Connected TV (CTV) in Indonesia is gaining traction, with advertising expected to cross USD 2.1 billion in 2025.³ With CTV, advertisers gain the precision of digital and the storytelling power of television—a convergence that opens new possibilities but also demands new safeguards.

Mirroring the CTV growth in Indonesia, the OTT consumption is becoming mainstream across urban and emerging markets alike as a mobile-first audience increasingly turns to streaming content. Viewers now expect seamless, on-demand access to local and global content. For brands, this shift presents both reach and risk: while OTT enables precise audience targeting and dynamic creative formats, it's not immune to content adjacency and ad fraud. As with CTV, achieving scale must go hand-in-hand with ensuring safe, relevant, and respectful viewer experiences.

The MMA Indonesia Brand Safety & MarTech 2025 Industry Report offers both a diagnosis and a prescription. It calls on marketers to rethink how brand safety is defined and delivered. Today, brand safety must encompass more than avoiding harmful content, it must extend into data ethics, responsible media practices, and inclusive narratives.

For marketers, it is key to look into how do we can maintain control, trust, and transparency in an algorithm-driven world and what can we collectively do to distinguish our brands in a saturated attention economy while protecting them from reputational risk. This report is a window to provide some key insights and help navigate as we go along.

¹<https://www.researchandmarkets.com/reports/5735227/wind-electricity-market-report>

²<https://www.statista.com/outlook/amo/advertising/influencer-advertising/worldwide?currency=USD>

³<https://www.statista.com/outlook/amo/advertising/indonesia?currency=USD>

FOREWORD

SHANTI TOLANI

Country Head & Board of Director Indonesia



At MMA Global Indonesia, our commitment is unwavering: to equip Indonesia's marketing & advertising community with the foresight, tools, and strategic clarity to build brands that are trusted, agile, and future-ready.

This Brand Safety and MarTech 2025 Industry Reports unpacks the ecosystem that provides marketers and business leaders with actionable insights, credible data, and a panoramic view of the opportunities and risks shaping digital growth in 2025 and beyond.

In an era where precision, speed, and trust define market leadership, Artificial Intelligence (AI) is the nerve center of modern marketing. For Indonesia, this shift is already underway. The country's AI market is projected to expand from USD 2.2 billion in 2022 to USD 9.1 billion by 2031, a staggering 306.4% growth trajectory that is rewriting how brands engage with consumers and how marketers make decisions.¹ As AI transforms how campaigns are planned, deployed, and measured, the imperative for marketers is two-fold: extract value without compromising on integrity. The MMA Indonesia Brand Safety & MarTech 2025 Industry Report serves as an essential compass in this rapidly evolving terrain.

The ASEAN Responsible AI Roadmap 2025-2030 sets the groundwork for ethical governance, calling on both policymakers and industry to develop AI systems that are transparent, accountable, and inclusive.²

Retail Media Networks (RMNs) offer another powerful frontier. With Indonesia's retail market poised to grow by USD 49.9 billion between 2025 and 2029,³ RMNs are reshaping the media buying ecosystem, allowing brands to tap into first-party data and close the loop between ad spend and real-time conversion. In parallel, the rise of social commerce is blurring the boundaries between content, community, and commerce.

Indonesia's projected ascent to the world's 7th largest economy by GDP (PPP) in 2025⁴ brings with it more informed, digitally active, and brand-aware consumers. Marketers are no longer simply storytellers—they are experienced architects navigating a marketplace that demands personalization, cultural nuance, and ethical consistency. At this juncture, innovation must not only captivate but also respect the consumer's attention and values.

We thank our contributors and partners for their continued belief in this mission. Their efforts not only capture the latest trends but also provide a critical lens through which marketers can assess what works, what's sustainable, and what could potentially damage brand equity if left unchecked.

¹<https://www.statista.com/outlook/tmo/artificial-intelligence/indonesia>

²<https://asean.org/wp-content/uploads/2025/02/ASEAN-Responsible-AI-Roadmap-Final.docx.pdf>

³<https://www.technavio.com/report/indonesia-retail-market-industry-analysis>

⁴<https://www.imf.org/id/Publications/WEO>

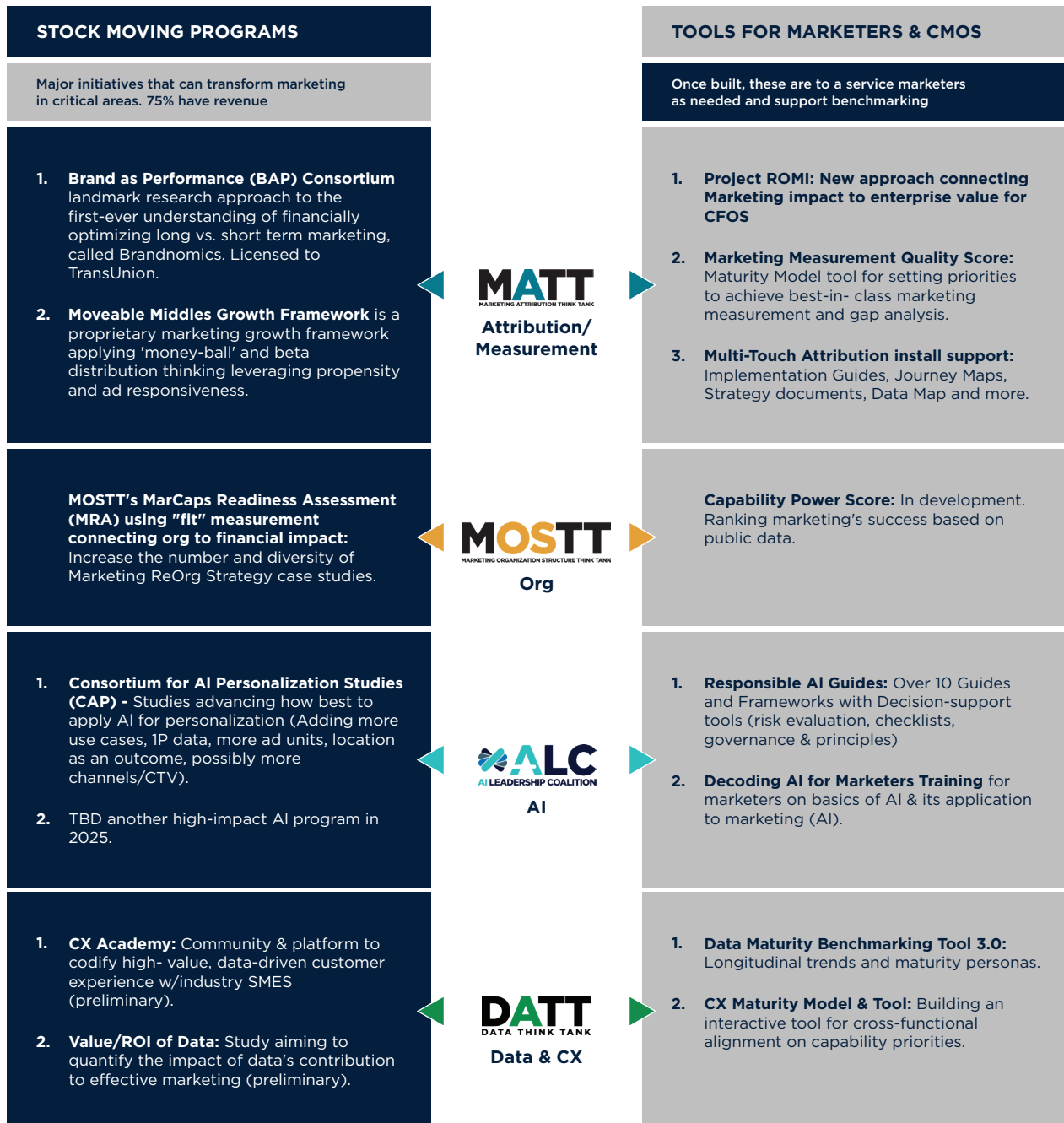
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Abbreviations

AI - <i>Artificial Intelligence</i>	GARM - <i>Global Alliance for Responsible Media</i>
APAC - <i>Asia Pacific</i>	GDP - <i>Gross Domestic Product</i>
CAGR - <i>Compound Annual Growth Rate</i>	GDPR - <i>General Data Protection Regulation</i>
CDP - <i>Customer Data Platform</i>	GLOOH - <i>Global Out-of-Home</i>
CPG - <i>Consumer Packaged Goods</i>	IPTV - <i>Internet Protocol Television</i>
CRM - <i>Customer Relationship Management</i>	KPIs - <i>Key Performance Indicators</i>
CSR - <i>Corporate Social Responsibility</i>	LCO - <i>Local Cable Operator</i>
CTOR - <i>Click-to-Open Rates</i>	MarTech - <i>Marketing Technology</i>
CTR - <i>Click-Through Rate</i>	MFA - <i>Made-For-Advertising</i>
DCO - <i>Dynamic Creative Optimization</i>	OTT - <i>Over-The-Top</i>
DEI - <i>Diversity, Equity, and Inclusion</i>	PCA - <i>Personal Colour Analysis</i>
DOOH - <i>Digital Out-of-Home</i>	PDP - <i>Personal Data Protection</i>
DTH - <i>Direct-to-Home</i>	RMN - <i>Retail Media Networks</i>
ESG - <i>Environmental, Social, and Governance</i>	ROI - <i>Return on Investment</i>
ETL - <i>Extract, Transform, Load</i>	SKU - <i>Stock Keeping Unit</i>
FTA - <i>Free-to-Air</i>	SMS - <i>Short Message Service</i>
FMCG - <i>Fast-Moving Consumer Goods</i>	SOV - <i>Share-of-Voice</i>

MMA Global Thought-Leadership Programs





Optimizing AI in Indonesian Marketing

The velocity of AI adoption in Indonesia demands a proactive stance. Research from Microsoft and LinkedIn revealed that a striking 92% of leaders in Indonesia recognise AI adoption as essential for maintaining competitiveness, but there remains a lag between vision and implementation. This has resulted in the widespread practice of Bring Your Own AI/BYOAI in Indonesia (76% of employees), and organisations are losing out on the efficiency and insights gained from structured AI implementation while exposing company data to potential risks.¹



This signals a clear shift: AI is no longer a future consideration, but a competitiveness necessity today. Those who integrate it strategically will redefine customer engagement and operational agility. Unlike traditional AI, which was used primarily for operational automation (e.g., chatbots answering FAQs), marketers in Indonesia are tapping on AI, especially generative AI tools, to empower dynamic content creation, predictive personalization, and automated decision-making loops without human bottlenecks. It bridges the gap between "data processor" and "creative engine," unlocking new ways to mass-customize content across Indonesia's fragmented demographics.

At the same time, the generative AI platforms to balance innovation with national security concerns. The ministry has emphasized that it will take cautious steps in responding to the use of generative AI, ensuring that any regulatory decisions support long-term sustainability, data protection, and responsible technological advancement.²

The Role of AI In Performance & Partnerships

AI is fundamentally transforming performance marketing through automation and advanced capabilities. By enabling faster decision-making, smarter targeting, and more efficient budget allocation, AI empowers marketers to optimize campaigns in real-time and scale with precision.³

- **AI-Driven Automation**

AI automates tasks like bid management and performance analysis, boosting efficiency and freeing marketers to focus on strategy.

- **Real-Time Optimization**

AI continuously adjusts campaigns in real-time, ensuring optimal budget allocation and performance improvements.

- **Enhanced Attribution**

AI refines attribution models, providing clearer insights into which channels drive conversions and improving ROU by optimizing budget spend.

AI is also reshaping agency operations by not only streamlining workflows but also enabling a shift towards more strategic, high-impact work. This transformation is prompting agencies to adapt their processes:⁴

- **Accelerated Decision-Making and Feedback Loops**

Gen AI tools enable clients to validate ideas and concepts in real-time, significantly reducing the time traditionally spent on research and approval processes. This acceleration leads to tighter feedback loops and more agile campaign adjustments, enhancing responsiveness and collaboration between agencies and brands.

- **Transformation of Agency Structures**

The integration of Gen AI is prompting agencies to reorganize their structures, moving towards smaller, integrated teams with specialized expertise. AI-powered tools enable teams to deliver high-quality creative output more efficiently, allowing agencies to allocate more resources to innovation and improving performance.

Setting Expectations & KPIs with Your Agency: Best Practices

To fully optimize the power of AI, brands need to rethink how they collaborate with agencies, ensuring AI is seamlessly integrated into broader business strategies:⁵

- **Align AI Strategies with Business Goals: AI should be a means to an end, not an end in itself.**
 - Use AI to enhance, not replace, human creativity and customer relationships. The human element is still crucial in understanding cultural nuances and building emotional connections.

- **Test & Optimize AI-Generated Content: Treat AI-generated content as a starting point, not the final product.**
 - Use A/B testing to compare AI-generated and human-generated content performance. This will provide valuable data on what resonates best with your audience.
 - Train AI models with localized data to improve cultural relevance and engagement. Generic AI models often lack the nuance needed to connect with consumers.
- **Maintain Brand Consistency & Human Oversight: Protect brand identity in the age of AI.**
 - Develop brand guidelines for AI-generated content to ensure messaging consistency. This should include tone of voice, style, and visual identity.
 - Use human review processes to refine AI-generated creatives before publishing. This adds a layer of quality control and ensures that the content aligns with your brand values.
- **Ensure Data Privacy & Ethical AI Use: Navigate the regulatory landscape with care.**
 - Comply with Indonesia's data protection regulations (PDP Law). This is not just a legal requirement; it's a matter of building trust with your customers.
 - Avoid AI bias by ensuring diverse training data for AI models. Biased AI can perpetuate harmful stereotypes and damage your brand reputation.
- **Measure ROI & AI Effectiveness: Don't just implement AI; measure its impact.**
 - Define KPIs such as conversion rates, engagement, and customer retention. These metrics should be directly tied to your business goals.
 - Continuously refine AI strategies based on performance insights. Use data to identify what's working and what's not, and adjust your approach accordingly.

¹Microsoft and LinkedIn. (2024). AI at work is here, now comes the hard part: 2024 Work Trend Index Annual Report. Available at: <https://www.microsoft.com/en-us/worklab/work-trend-index/ai-at-work-is-here>

²Dhamaraj, S. (2025). Indonesia evaluates risks and benefits of generative AI. OpenGov. Available at: <https://opengovasia.com/2025/02/12/indonesia-evaluates-risks-and-benefits-of-generative-ai/>

³Hatthotuwa, S. (2025). How is AI changing the agency-client relationship. Futureweek. Available at: <https://futureweek.com/how-is-ai-changing-the-agency-client-relationship/>

⁴The Data Scientist. (2025). How AI is transforming performance marketing to maximise ROI. Available at: <https://thedata scientist.com/how-ai-is-transforming-performance-marketing-to-maximise-roi/>

⁵R3. (2023). AI in Creative & Production: An R3 Guide. Available at: <https://rthree.com/insights/ai-in-creative-production/>



SHUFEN GOH

President APAC, MediaSense and
Co-founder





Navigating the AI Frontier:

Brand Safety
and Growth
in Indonesia's
Martech
Landscape

The Indonesian digital landscape is experiencing a seismic shift, driven by the rapid proliferation of Artificial Intelligence, particularly Generative AI. From marketing and advertising to diverse industries, the adoption of AI is no longer a futuristic concept but a present-day reality. The Indonesian Ministry of Communication and Digital Affairs stated that AI has created opportunities for digital economic growth, and is [expected to contribute US\\$366 billion to Indonesia's GDP by 2030¹](#). Furthermore, the Deputy Minister of Communication and Digital Affairs Nezar Patria emphasized that the growth is driven by the marketing industry, among others such as gaming and education.

Agencies and advertisers are enthusiastically embracing AI-driven solutions, drawn by the promise of enhanced efficiency, creative innovation, and deeper customer engagement. However, this swift integration necessitates a measured approach, acknowledging both the immense opportunities and the burgeoning complexities that accompany this evolving technology.

AI: A Double-Edged Sword for Brand Reputation and Growth

AI's influence on brand reputation presents a compelling duality. On one hand, it empowers brands to forge stronger customer bonds through hyper-personalized content, bespoke recommendations, and interactive experiences, fostering heightened engagement and consumer loyalty. AI-powered automation streamlines marketing workflows, liberating human capital for strategic endeavors that drive brand visibility and market penetration. This increasing reliance on AI is evident in the Asia Pacific region, where a [Meltwater study²](#) revealed that over half (55%) of marketing and communication professionals plan to amplify their use of AI tools in 2024. This adoption is driven by tangible benefits, with 64% of APAC marketers reporting time savings in writing and 36% noting improvements in their copy through AI utilization. Notably, Indonesia is emerging as a key market embracing this technological shift, with the [e-Conomy SEA 2024 report by Google, Temasek, and Bain & Company³](#) identifying marketing as one of the top three sectors prioritizing AI integration.

Growing brand reputation risks are a major concern. Generative AI's independent content generation introduces new brand suitability issues, including potential conflicts with brand values, inaccurate information, or offensive material, jeopardizing consumer trust. The increasing sophistication of made-for-advertising (MFA) sites, as per DoubleVerify's (DV) research, exacerbates this. These fast-growing MFA networks often imitate legitimate publishers, sometimes using AI-generated content and bot-driven pageviews to evade detection.

The multifaceted threats to brand reputation demand close scrutiny. A primary risk is placing ads with AI-generated inappropriate content like hate speech or fake or misleading information, leading to significant and

lasting damage. At DV, we have identified a rapid increase in fraud schemes, emphasizing the urgent need for better brand protection in the era of AI content and sophisticated ad fraud.

Furthermore, the risk of AI generating biased or discriminatory content, reflecting inherent biases in its training data, can lead to negative consumer sentiment and accusations of insensitivity. The spectrum of AI-driven deepfakes and manipulated media further jeopardizes brand authenticity and can be exploited to propagate false narratives. The increasing accessibility of sophisticated AI tools amplifies these risks, making brand safety even more imperative.

Some of the latest incidents in Indonesia underscore this risk, ranging from deepfake videos [impersonating Indonesia President Prabowo](#)⁴ and other high-ranking officials (i.e., Indonesia Vice President Gibran Rakabuming Raka, and Minister of Finance Sri Mulyani Indrawati), as well as the manipulation videos of other regional leaders for online scams to perpetrate fraud. Even in the political sphere, [deepfakes have been employed to spread misinformation](#) and shape public perception.⁵ These real-world examples, though not always directly tied to advertising, illustrate the potent and increasingly sophisticated ways in which AI can be used to deceive and erode trust, making brand vigilance against manipulated media paramount.

Navigating the Challenges of Generative AI for Indonesian Brands

For Indonesian brands, ensuring brand safety in this era of Generative AI requires addressing the fundamental lack of content control and the nuanced definition of 'suitability' across diverse cultures. Establishing clear, contextual guidelines is vital for safeguarding brand equity in AI. The accelerating pace of AI development compels brands to proactively update their safety strategies to counter new content risks and potential misuse.

Navigating Indonesia's diverse cultural landscape demands heightened brand vigilance. Respecting varied beliefs and social norms in advertising is crucial. The rapid dissemination of online content necessitates continuous monitoring to mitigate reputational risks.

The Consumer Perspective: Trust and Brand Reputation in the Age of AI

Digitally savvy Indonesian consumers appreciate AI that enhances their experience through personalization and engaging content, fostering positive brand connections. They value tailored interactions demonstrating an understanding of their needs.

Friction arises if AI is perceived as manipulative, disseminates misleading information, or feels impersonal, eroding trust. Concerns about data privacy

and AI ethics are significant. Transparency about AI usage is crucial for maintaining consumer confidence, as Indonesians prioritize authenticity.

Maintaining positive brand equity is vital for AI-driven advertising in Indonesia, given the cultural emphasis on trust and ethics. Negative impacts from brand-unsafe content can lead to boycotts and decreased loyalty, significantly hindering competitiveness.

Harmonizing Brand Safety, Suitability, and AI-Driven Branding

Balancing AI's transformative potential with brand safety in Indonesia is crucial and achievable. These aren't mutually exclusive but require a proactive, comprehensive approach. This means moving beyond AI adoption to responsible implementation, with robust safety measures, clear ethical guidelines, and transparent, accountable AI marketing. Viewing brand safety as enabling innovation allows brands to fully leverage AI while mitigating risks.

Key strategies for achieving this balance include:

- **Developing Clear Brand Guidelines for AI Content Generation:** Establishing specific parameters for AI-generated content to ensure alignment with brand values and cultural sensitivities.
- **Investing in Robust Brand Safety & Suitability Solutions:** Implementing advanced technologies for real-time monitoring and filtering of AI-generated content across platforms.
- **Embracing Human Oversight and Continuous Monitoring:** Integrating human review and approval processes for AI-generated content, particularly for sensitive topics and diverse audiences.
- **Prioritizing Transparency and Communication:** Clearly communicating with consumers about the use of AI in advertising, data privacy practices, and ethical considerations.

The Pivotal Role of Technology as the Solutions

With Indonesia's fast adoption of marketing technology, the increasing prevalence of AI brings a significant expansion of potential risks for brands. Ensuring control and visibility over AI-driven campaigns has become increasingly important, as automated solutions help mitigate risks by monitoring content and analyzing suitability. When applied effectively, AI can enhance rather than undermine brand reputation.

Key technologies supporting Indonesian brands in this evolving landscape, include:

- **Advanced AI-Powered Monitoring and Filtering:** Intelligent systems capable of analyzing and categorizing content, enabling brands to detect and filter out brand-unsafe or unsuitable content generated by other AI systems.

- **Customizable Brand Safety and Suitability Settings:** Adaptable tools that allow businesses to define their own brand safety parameters, ensuring alignment with their specific needs, values, and the cultural nuances of the Indonesian market.
- **Real-Time Insights and Reporting:** Comprehensive data-driven evaluations that empower brands to proactively assess and address potential concerns related to AI-generated content.
- **Strategic Support and Industry Guidance:** Offering strategic advice, best practice recommendations, and ongoing monitoring and optimization to help brands navigate the complexities of brand safety in the age of AI.

Beyond risk mitigation, brands can effectively safeguard their reputations by fostering consumer trust, thus achieving their broader growth objectives in the AI era. Consumers are more likely to engage with and support brands that demonstrate a commitment to brand safety and ethical advertising practices. This strong brand reputation, underpinned by consumer trust, directly translates to increased brand loyalty, positive word-of-mouth, and sustainable growth.

¹"AI can drive Indonesia's digital economic growth, says official" - Antaranews (Feb 21,2025)

²"More than half of APAC social media teams see AI as important" - Martechasia.net (May 30, 2024)

³e-Conomy SEA 2024 report by Google, Temasek, and Bain & Company

⁴"Two to Stand Trial in President Prabowo Deepfake Scam" - Jakartaglobe.id (April 24, 2025)

⁵"Indonesians swindled by scams using President Prabowo deepfakes" - The Straits Times (Mar 2, 2025)



ANURAG SURE

Senior Business Director for Indonesia





Brands as Pioneers for the Ethical Use of AI

Artificial Intelligence (AI) has emerged as a key element influencing the direction of brand and marketing as industries continue to undergo revolutionary technological shifts. The strong potential of AI comes with high risk of side-effects, thus firm ethical obligation is needed. Today's brands must hold a balance between efficacy and efficiency, plus morality in order to ensure sustainability and long-term success of the brand. Visionary brands see AI as a strategic opportunity to lead ethically and encourage positive technological adoption across industries, rather than just as a disruptive force. Good brands understand the power and the responsibility they have to contribute to shaping a better community.

Additionally, blu handled intellectual property and rights in a transparent manner, guaranteeing that all participating creative professionals received just compensation and full credit. By being transparent about these procedures, blu created a favorable perception of AI use and successfully allayed any possible ethical worries.

By achieving accurate customer segmentation and focused audience engagement without sacrificing ethical standards, blu illustrated the useful benefits of AI through this campaign. Such transparent practices set a powerful precedent, showcasing how responsible AI can support human talent and creativity, ultimately enriching the consumer experience.

Why Brands Must Lead in Ethical AI Practice

Trust is still one of a brand's most important assets. According to Leger Consumer Trends Report 2022, 64% of consumers view a brand's commitment to social responsibility as important, a number that rises to over 67% among Millennials and Gen Z.¹ Furthermore, half of the consumers surveyed believe brands should advocate for important issues on social media, a sentiment growing to 65% among younger generations.

Consumer expectations regarding transparency and responsible use are raised by the incorporation of AI into daily life. While misuse—such as biased algorithms, false information, and deepfakes—can seriously harm a brand's reputation and equity, ethical AI practices directly increase consumer trust. Adopting ethical standards proactively puts brands ahead of regulatory changes, lowering legal risks and building their reputation as reliable innovators. Since Gen Z and Gen Alpha place a high value on social responsibility and real accountability, ethical AI leadership is particularly important in determining brand preference among younger demographics.^{2 3}

How Brands Introduce Ethical AI

BCA Digital's "SepanjangJalanPegangan" campaign is a concrete example of implementing AI giving another approach in delivering financial literacy.⁴ Instead of using AI to simply replace human-powered creativity, blu purposefully incorporated AI to enhance efficiency in producing campaign main components: a consensual voice generated multiplier. As for other creative elements which are heavily leaning on human-made creativity, such as key visual creation, talent photography, music video production, and customized lyric development, blu decided no AI should replace the process. This method, blu showcases the use of AI that augments rather than reduces human contributions, showing a clear respect for human creativity and talent.

blu's approach successfully earned the trust and enthusiastic participation of collaborators while others might have resisted AI-driven initiatives. While AI proposals can sometimes be met with skepticism or reluctance by artists, blu's ethical and transparent methodology harnessed positive engagement and openness for further exploration. By leveraging AI responsibly, blu demonstrated how brands could build genuine collaborative relationships. This excitement is reflected through media coverage SepanjangJalanPegangan gained with 100% positive feedback. The success follows through the performance on social media, as well.

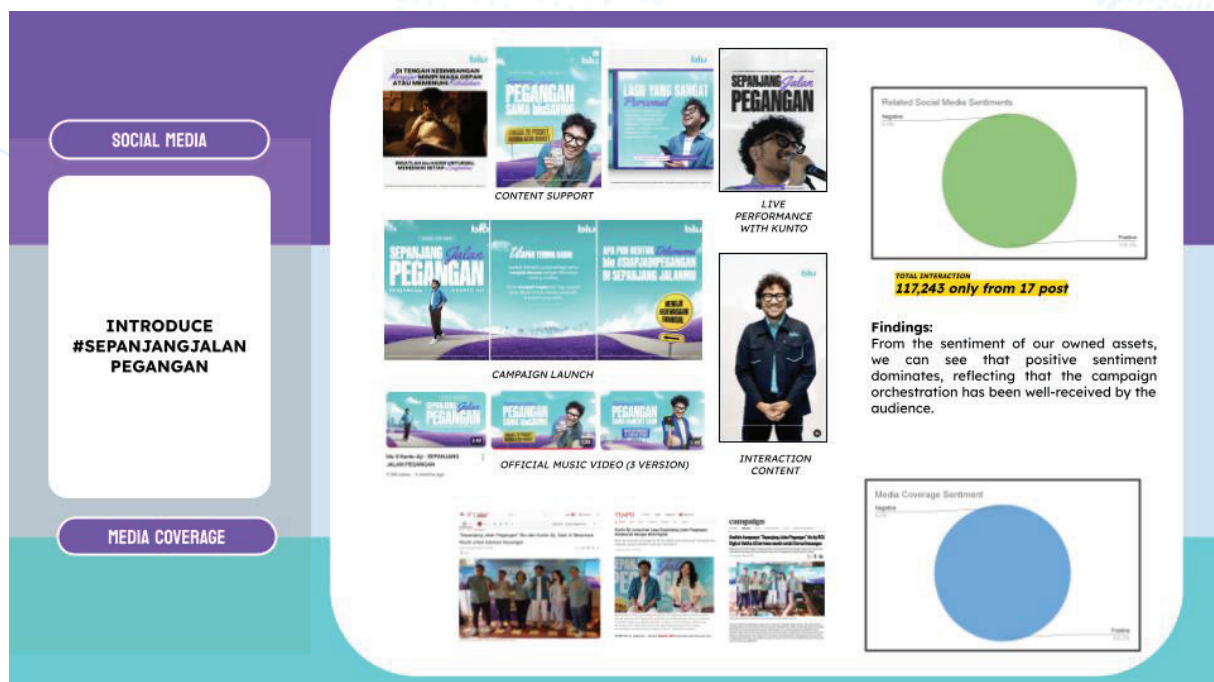


Image 1: Creative Implementation for SepanjangJalanPegangan, blu by BCA Digital Internal Data

Setting Industry Standards

Campaigns like "SepanjangJalanPegangan" have garnered overwhelmingly positive audience feedback, praised for ingenuity and responsible AI implementation, despite ongoing debates surrounding AI ethics. These programs inform consumers about the potential of AI and emphasize that it is a useful tool that can supplement humans rather than replace them.

By actively showcasing moral AI practices, companies set themselves apart as progressive leaders in the field, embracing technology innovation in a responsible manner to improve operations and customer interaction. Brands actively create an ethical future for marketing technology through strategic campaigns and open practices, protecting their reputations in the process.

In the age of AI-driven innovation, moral leadership is not just wise, but necessary for the long-term viability and success of a brand.

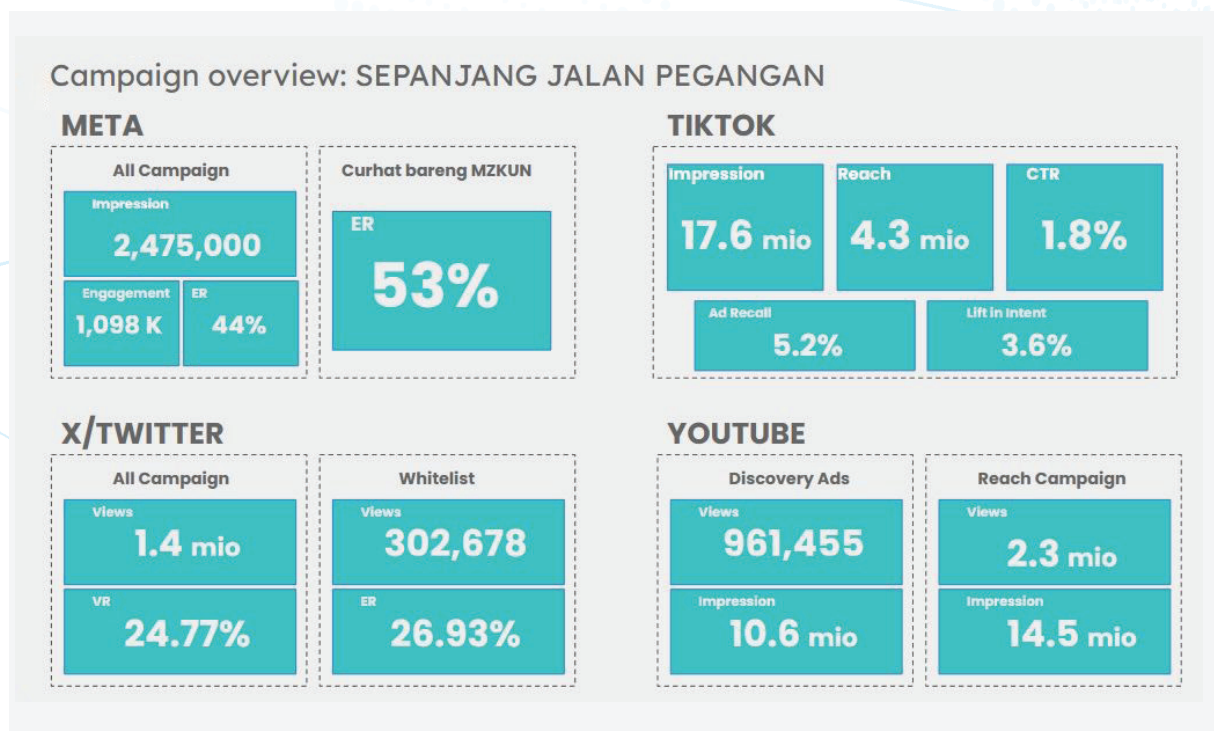


Image II: SepanjangJalanPegangan Campaign Overview, blu by BCA Digital Internal Data

Conclusion

Integrating AI has rapidly evolved from merely a trend into a powerful practice for forward-thinking brands. Despite potential risks of noise coming from the audience, strategically embedding advanced technology not only enhances creative production efficiency but delivers solid business outcomes, positioning brands as leaders in ethical innovation.

¹Leger Consumer Trends Report. (2022). See more:

<https://leger360.com/being-a-young-person-in-2022-generation-z-and-millennials-report/>

²SG Analytics. (n.d.). What is Generation Z: Gen Z Meaning, Age Range & What Comes After Gen Z. Retrieved from: <https://opengovasia.com/2025/02/12/indonesia-evaluates-risks-and-benefits-of-generative-ai/>

³Michael Brito. (2025). Gen Z vs. Gen Alpha: Breaking Down Blind Spots, Opportunities, and Differences. Retrieved from: <https://www.britopian.com/generation/gen-z-vs-gen-alpha/>

⁴Campaign Indonesia. (2025). Analisis kampanye "Sepanjang Jalan Pegangan" blu by BCA Digital: Ketika AI bertemu musik untuk literasi keuangan. See more on: https://www.campaignindonesia.id/article/analisis-kampanye-sepanjang-jalan-pegangan-blu-bca-digital-ketika-ai-bertemu-musik-untuk-literasi-keuangan/1916488?bulletin=buletin_campaign_indonesia



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Human + Machine: What Happens When Marketing Intelligence Becomes Emotional

A Shift from Speed to Sensitivity

Emotion is rarely listed as a KPI. And yet, it influences nearly everything we value in marketing, including trust, attention, timing, and ultimately action.

In Southeast Asia, marketing technology stacks have been built for speed. AI systems respond in real time, and dashboards optimize at scale. Yet, the cost of acceleration is often a loss of intimacy.

Clicks can be tracked, but hesitation remains invisible. Content can be personalized, but context is frequently missed. Brands are becoming more adept at locating their audiences, while increasingly struggling to foster a sense of belonging with them.

This is not a failure of technology, but a challenge of direction. AI has been trained to replicate what marketers once did, rather than address what customers truly need today.

As momentum increased, relationships became more transactional. Touchpoints were engineered, but authentic human touch was overlooked. While intent could be predicted, emotional nuance was often left behind.

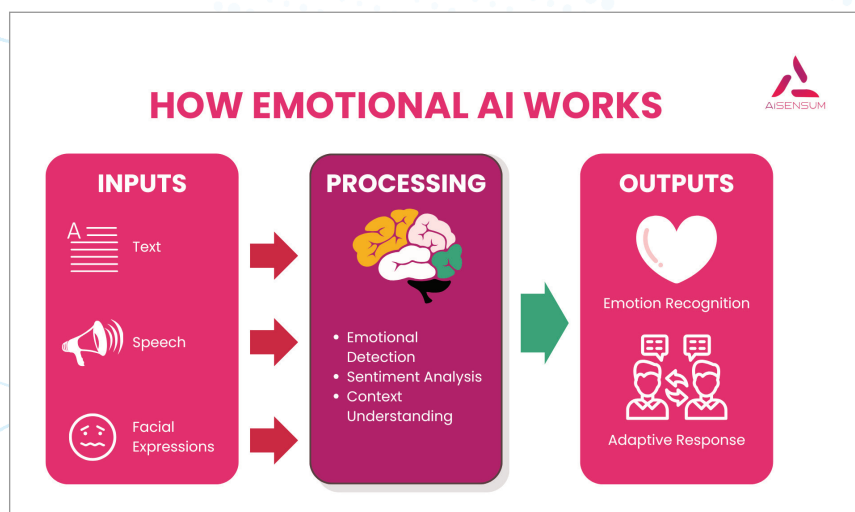


Image 1: How Emotional AI Works, AiSensum Internal Data

What Emotional Intelligence Looks Like in Marketing

Today, the customer doesn't just want relevance. They want recognition. They want systems that understand when to suggest, and when to pause. When to lean in, and when to hold back.

Emotionally intelligent AI doesn't mean AI that feels. It means AI that listens. That interprets tone, hesitation, and silence, not just behavior.

This shift is no longer theoretical but emotional intelligence in AI is emerging in real time. An agent might choose not to push an upsell after detecting repeated visits to a product page. Instead, it responded with empathy: offering reassurance, a helpful guide, even a personal message from the founder. The result? A measurable increase in brand trust.

In another case, a personal care brand used creative AI to modulate content based on treatment type, weather, and predicted month of purchase. On rainy days, a comforting visual. In May, a nudge to relax. In June, sometimes, silence. Performance improved not because the system pushed more, but because it understood more. We believe that Less is more.

This is not about building emotion into machines. It's about building systems that help marketers recognize emotion as a primary design input, not a secondary outcome.

Inside an Emotionally Intelligent Workflow

Emotional intelligence in AI is no longer just a metaphor—it's being operationalized through multi-agent systems that mirror how real teams sense, decide, act, and learn.

The process starts with raw, often unstructured input: user transcripts, photos, usage diaries, even facial expressions in video stills. Our Input ETL (Extract, Transform, and Load) Agent processes this data into a structured format. From there, the AiQ Researcher Agent identifies pain points, segments users, and translates qualitative signals into quantifiable behavior clusters.

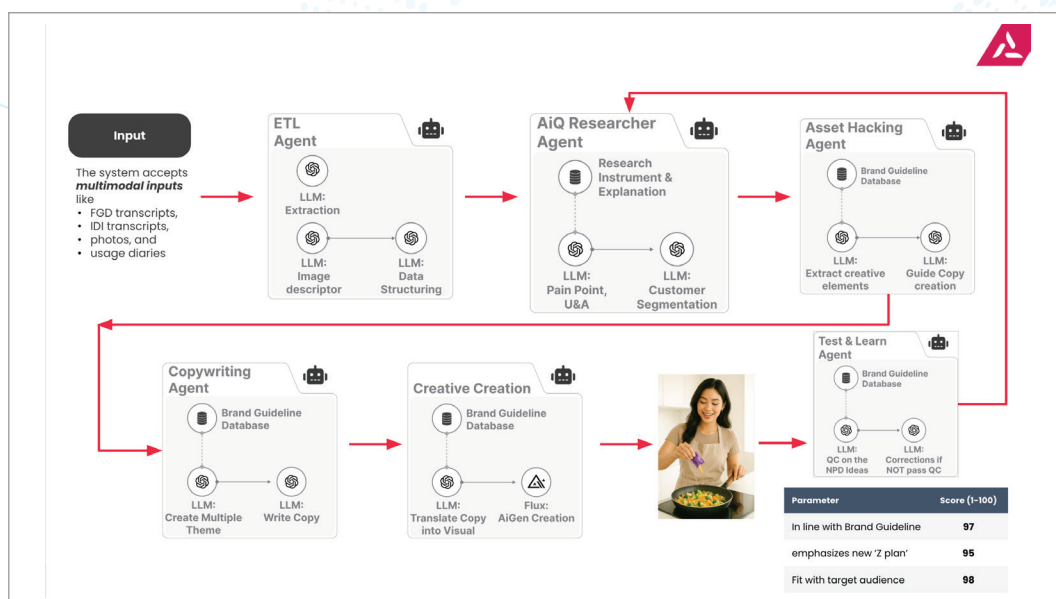


Image II: Emotionally Intelligent Workflow, AiSensum Internal Data

This is where emotional awareness begins, in understanding that not all behavior is equal. Scroll hesitancy, page revisits, incomplete form fills, these aren't noise. They're emotion signals.

From those signals, the Content Creation Agent crafts communication themes, while the Creative Agent translates intent into visuals, tone, color, texture: all adapted to emotional fit.

Before anything reaches the customer, it's evaluated by a Test & Learn Agent, which ensures outputs are aligned with brand guardrails, purpose, and emotional tone.

This isn't AI that 'feels.' It's AI that knows how to act like a system designed by people who do it.

Designing with Responsibility in Mind

Emotion AI is projected to grow from \$2.9 billion today to over \$19 billion by 2034.¹ But growth alone isn't the story. Direction is.

Responsible AI begins with thoughtful design. Models are increasingly developed with safeguards such as ring-fencing, privacy-aware deletion, and brand-safe tone controls. These measures aren't solely driven by legal requirements but stem from a commitment to fostering trust and maintaining meaningful relationships with users.

Customers may not read every privacy line, but they feel when something isn't right. And trust, once lost, is almost impossible to rebuild with automation.

In the realm of AI-driven customer interactions, ethical considerations are paramount. For instance, when a system detects a brief pause—say, two seconds of user silence—it might be technically feasible to prompt re-engagement. However, choosing not to act in such moments can be a strategic decision rooted in respect for user autonomy.

The Path Forward

The next generation of marketing systems won't win by being louder or smarter. They will win by being better at listening.

Emotionally intelligent systems will increasingly guide not just content delivery, but campaign timing, creative tone, and resource allocation. The emotional layer won't be an afterthought, it will become the operating layer. And that kind of intelligence only works when the people behind it are willing to slow down long enough to remember why we built all this in the first place.

Because customers can always tell when a system is guessing. But they can also tell when a system knows. And that's the shift we're navigating now—not toward machines that feel, but toward machines that help us feel more human in how we show up, how we serve, and how we lead.

¹Global Market Insights Inc. (2025). Emotion AI Market Size, 2025-2034 Trends Report. Retrieved from: www.gminsights.com/industry-analysis/emotion-ai-market. Accessed 1 May 2025.

**VIVEK THOMAS**

Managing Director

**AGUNG ARAFAH**

Director of Operations





Unlocking the Future of Beauty: AI-Powered Personal Colour Analysis

Introduction: The Rise of Personal Colour Analysis in Beauty

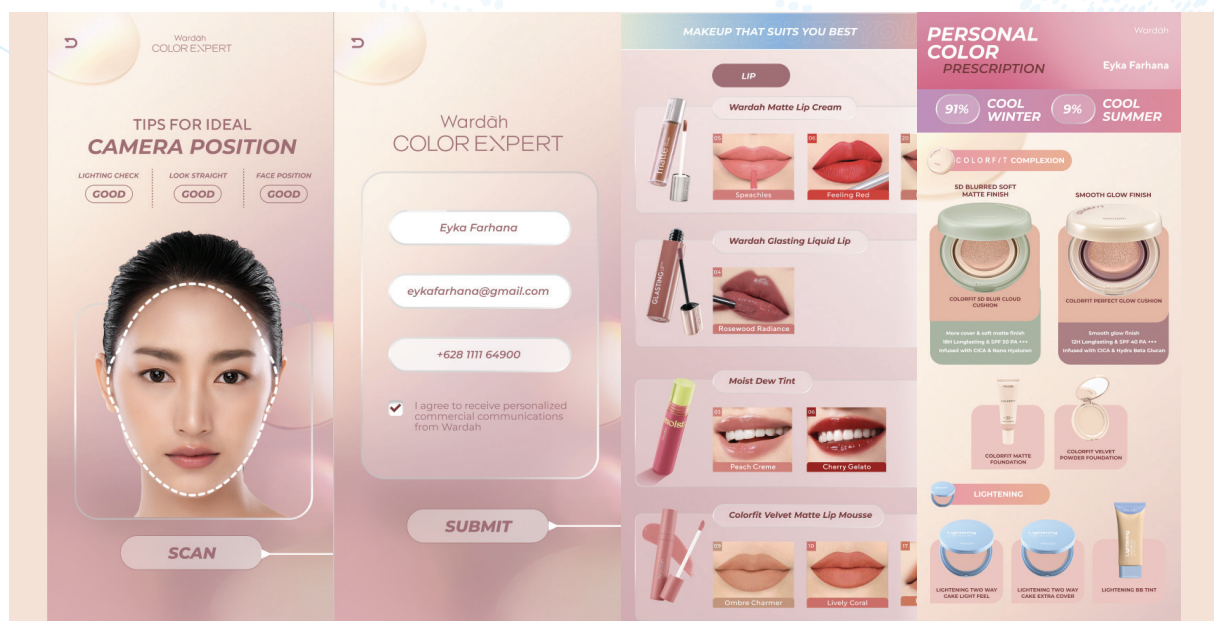
Personal Colour Analysis (PCA) has gained immense traction within the beauty industry. As consumers seek more personalized beauty solutions, Personal Color Analysis has evolved into an essential tool for individuals looking to enhance their natural beauty. However, most Personal Color Analysis has remained exclusive, requiring professional consultations that are often costly and inaccessible to many.

To address this, Wardah introduced Colour Intelligence™ as a proprietary technology utilized in its product development process. This innovation ensures that every Wardah product is formulated to suit the specific undertones and shade ranges common among Asian women, making shade matching more exclusive, inclusive, and effective from the start.

Recognizing the power of this innovation, the AI-powered Personal Colour digital platform popularized as **Wardah's Colour Intelligence™** concept emerged into a consumer-facing digital experience. This platform combines deep knowledge of our color expert with advanced artificial intelligence to analyze users' skin tone, undertone, and preferences, providing personalized shade recommendations with expert-level accuracy.

Bridging Science and Beauty with AI

AI-powered Personal Color Analysis represents the strategic fusion of cutting-edge technology and deep beauty expertise, enabling Wardah to deliver hyper-personalized, data-driven beauty experiences at scale.



This advanced AI solution analyzes an individual's skin tone, undertone, and personal preferences to recommend the most flattering shades of complexion products, blushes, and lipsticks tailored to their unique beauty profile.

Key Features of the AI-powered Personal Color Analysis Experience:

1. Advanced Skin Tone & Undertone Detection

Our AI technology leverages machine learning algorithms to accurately identify variations in skin tones and undertones. Unlike traditional methods that rely on subjective judgment, our system provides an **objective, data-driven analysis** to ensure precise recommendations.

2. Smart Shade Matching

By analyzing thousands of shade variations, our AI can suggest the most complementary foundation, blush, and lip colors for each user. This helps consumers avoid mismatched shades, ensuring a **flawless and natural-looking** finish.

3. Instant, Accessible, and User-Friendly

With just a few taps, users can experience a comprehensive Personal Color Analysis from their mobile devices or desktops, eliminating the need for in-person consultations. This democratization of beauty empowers individuals to confidently discover their best colors—**anytime, anywhere**.

4. Cultural and Individual Inclusivity

Recognizing the diversity of beauty across different skin tones, our AI is trained on a **broad and inclusive dataset** that ensures shade recommendations cater to all ethnicities and complexions.

5. Seamless Product Integration

Once the AI identifies a user's ideal color palette, it seamlessly links them to Wardah's product range, providing an **effortless shopping experience**. This direct integration ensures that users can find and purchase their best-matched products with confidence.

Revolutionizing Beauty with Data-Driven Confidence

This AI-powered Personal Color Analysis is more than just a digital tool—it's a beauty empowerment experience. By leveraging artificial intelligence, we provide a scientific approach to beauty that eliminates guesswork, enabling individuals to embrace and enhance their natural beauty with precision.

Moreover, this innovation supports sustainability by reducing product mismatches and unnecessary purchases, aligning with conscious consumerism values.

Making Personal Colour Analysis Accessible to All

Wardah's mission has always been to make beauty accessible and meaningful. **Wardah Personal Colour Analysis infused with AI** is an extension of this vision, breaking barriers and ensuring that every woman can confidently find her perfect shade. Whether for first-time makeup users or seasoned beauty enthusiasts, this AI-driven tool offers **an effortless, enjoyable, and empowering** beauty journey for everyone.

As AI continues to shape the future of the beauty industry, **Wardah Colour Intelligence** remains at the forefront, pioneering innovations that celebrate individuality and enhance self-expression. Through **AI-powered Personal Color Analysis**, Wardah is revolutionizing beauty personalization, offering a tailored experience that empowers every individual to find their perfect shade with precision and ease.

Result: Redefining Beauty Leadership with Tech-Driven Personalization

Within campaign launch, Wardah achieved significant early wins: over **1,000,000 users** engaged with the AI-powered experience, a **3x increase in conversion rates** for complexion products was recorded, and **positive sentiment surged above 80%**, with frequent mentions of the experience being "accurate," "easy," and "empowering." This initiative, aligned with evolving consumer expectations, translated AI-driven personalization into tangible business outcomes—reinforcing brand leadership and unlocking new growth across digital channels.

1. Sustaining Market Leadership

Wardah retained its position as Indonesia's #1 makeup brand in 2025, according to Nielsen. This reinforces the strength of Wardah's brand equity and sustained consumer trust.

2. Surpassing E-Commerce Growth Benchmarks

We saw triple-digit online sales growth, powered by AI-driven Personal Color Analysis that turned personalized recommendation into **seamless** conversions.

These achievements reflect how targeted MarTech execution, particularly AI personalization, can directly impact business performance. By addressing a key

consumer friction point (shade selection), Wardah not only boosted customer confidence but also set a new benchmark for inclusive, tech-enabled beauty experiences in Indonesia.

The campaign helped position personal color analysis as an emerging trend within the Indonesian beauty ecosystem, with Wardah leading the movement. Through the Beauty AI initiative, the brand made advanced color-matching technology both accessible and relevant, especially for Indonesia's digitally native, personalization-driven younger consumers.

By turning a complex beauty decision into a seamless and empowering digital journey, Wardah elevated both brand trust and perceived expertise. The campaign's success stands as a case study in how AI and marketing technology can work in harmony to achieve both commercial growth and deeper consumer resonance.



AMALIA SARAH SANTI

Executive Vice President &
Global Chief Business Officer





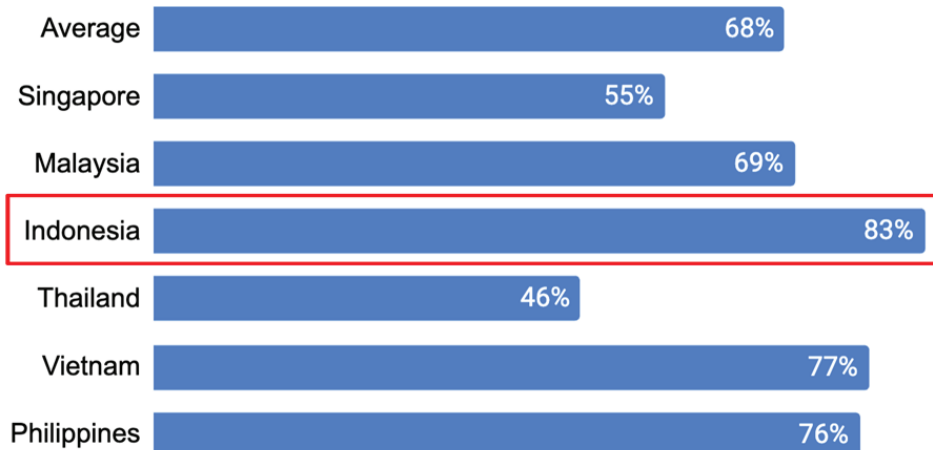
Beyond Personalisation: AI-Driven Campaign Innovation

I. AI Insight to Execution in FMCG

Indonesia's FMCG (Fast-Moving Consumer Goods) sector is entering a new phase of digital maturity. As AI (Artificial Intelligence) shifts from experimental tools to operational imperatives, consumer behaviour is evolving, regulatory frameworks are tightening, and the intersection of artificial intelligence, creative execution, and martech infrastructure is redefining how FMCG brands engage, protect, and grow their presence in this high-potential market.

43% of consumers globally express distrust in AI-generated advertising.¹ At the same time, AI is increasingly embedded in FMCG marketing functions, not as a standalone technology, but as part of integrated systems that support decision-making, customer understanding, and creative output. Key applications include content automation, enabling the large-scale generation of localised materials tailored to different audiences, and optimising CRM by delivering hyper-personalised messaging based on purchase history and platform-level engagement.

Sellers' Familiarity with Artificial Intelligence by Market (Southeast Asia, 2025)



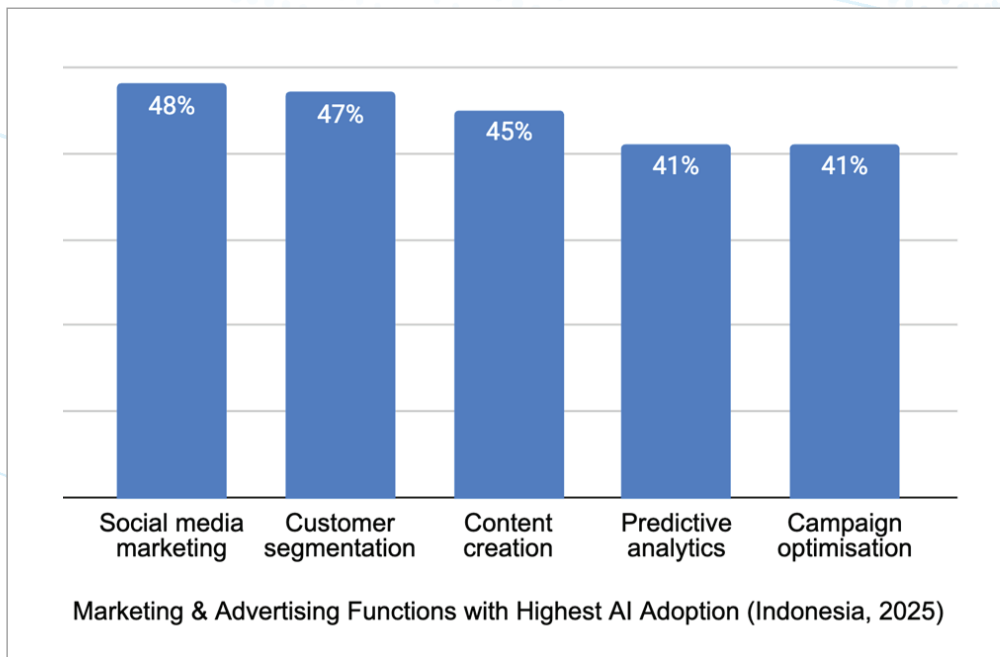
Source: Kantar & Lazada, Bridging the AI Gap, 2024

The focus is shifting from general personalisation to relevance at scale, where AI-driven insights are used to tailor content, offers, and product recommendations based on intent signals rather than static demographic profiles. AI should enhance, instead of replacing, human creativity. When grounded in cultural insight, AI-generated content can amplify authenticity and emotional resonance.

With the 2024 implementation of Indonesia's Personal Data Protection Act (PDPA), marketers must ensure AI systems meet strict compliance standards, with human oversight, bias monitoring, and clear disclosure when generative content is used. As consumer skepticism remains high, building trust through ethical, transparent practices is essential.

II. Campaign Innovation

50% of Millennials and Gen Z feel they can better filter and personalise information on social media.² As FMCG brands move toward hyper-relevance, AI is playing a pivotal role in transforming campaign strategy and execution. Instead of relying solely on demographic targeting, marketers are using AI to analyse behavioural signals such as browsing patterns, purchase intent, and platform engagement to shape creative decisions and personalise messaging. This shift enables brands to deliver more meaningful, timely, and emotionally resonant experiences across Indonesia's diverse consumer landscape.



Source: Kantar & Lazada, Bridging the AI Gap, 2024

AI also empowers marketers to experiment and iterate faster by automating creative production and performance analysis. From dynamic product recommendations to region-specific audio and visuals, campaigns are becoming more agile and localised, allowing brands to adapt to fast-changing trends and preferences without compromising consistency. As a result, creative innovation is no longer a one-time effort but a continuous, data-informed process that bridges the gap between insight, execution, and impact.

III. Real-World Application: AI-Powered Creative Localisation

By integrating generative AI into the marketing operations, we have transformed the way to support multiple brands across portfolio, each with its own unique identity, visual language, and audience.

The challenge was clear: deliver marketing campaigns that feel unified across our portfolio yet nuanced enough to resonate with diverse audiences. Each brand had distinct positioning, visual codes, and audience segments, requiring a high volume of creative assets that could stay on-brand while adapting to the realities and nuances of different audience segments.

Wipro used a generative AI system to produce over 300 unique creatives, significantly reducing the time and effort compared to traditional production methods. These assets were tailored to reflect different preferences, strategic pillars, and audience behaviours — all while preserving the core identity of each brand.

To distribute at scale, by integrating AI-powered MarTech platform, enabling automated ad placement and real-time optimisation across regional publishers, mobile platforms, and digital channels. We can ensure each creative asset reached the right audience with maximum relevance and performance.

- 300+ creative assets produced with speed and consistency
- 35% of all content created involved AI-assisted photo or video production
- 70% cost reduction compared to traditional creative development processes

This approach demonstrated how AI can unlock creative agility and cultural relevance at scale. It allowed our teams to move faster, adapt smarter, and deliver with precision, combining the power of generative AI with MarTech automation to drive both efficiency and impact.

¹Kantar. (2024). Kantar Media Reactions

²Source: IDN Research Institute Indonesia Millennial and Gen Z Report 2025



HARTANTO

Head of Media – Wipro Unza



AKHIL MENON

Strategy and Operations – FCB Indonesia





The Illusion of Data Abundance: Why More Data \neq More Intelligence

I. Background & Challenge

In today's hyper-digital landscape, businesses often equate the accumulation of vast amounts of data with smarter decision-making. However, this assumption is increasingly flawed. Across Southeast Asia—and particularly in Indonesia—companies are collecting mountains of customer data, yet much of it becomes outdated, unanalyzed, and ultimately a liability rather than an asset. This phenomenon, known as "data decay," undermines the effectiveness of marketing strategies and introduces significant risks.

II. Reasoning

The comforting illusion of data abundance leads organizations to prioritize quantity over quality, mistaking massive datasets for actionable intelligence. Without timely analysis, data quickly loses its value—like storing perishable goods without refrigeration. In volatile markets like Indonesia, where frequent SIM card switching and fragmented digital identities are common, outdated records result in misdirected budgets and ineffective personalization efforts. Furthermore, regulatory frameworks such as GDPR and Indonesia's UU PDP (Personal Data Protection Law) amplify the risks of holding unused data, exposing companies to legal, financial, and cybersecurity vulnerabilities.

"You think you're sitting on a goldmine, but it's mostly sand."

III. The Comforting Illusion of Control

There is an emotional comfort in believing that every digital footprint is being captured. Companies equate data collection with control, yet often the critical insights remain locked away in cluttered databases. It's not enough to gather data; the true value lies in the decisions it informs. As one marketer once asked, "What decisions are we really making because of all this information?"

Indonesia has over 355 million mobile phone users as of 2024, according to Statista, with one of the highest average screen times globally at 5.8 hours per day.

Data Rot: The Unseen Enemy

Just like milk in your fridge, data has a shelf life. It decays. People switch devices, abandon emails, change numbers, or revoke consent. What once felt like a "treasure trove" slowly turns into digital noise. In Indonesia's dynamic digital environment, outdated contact details and behavioral trends rapidly lose relevance. When marketing strategies rely on obsolete data, personalization efforts not only fail but may even backfire, alienating customers rather than engaging them.

The Hidden Cost of Unused Data

As highlighted in Gartner's 2023 Data Management Forecast, up to 87% of organizational data goes unused—a figure echoed across Southeast Asia, where

data decay is exacerbated by mobile-first behaviors and limited data infrastructure. In Indonesia, the enforcement of UU PDP (Personal Data Protection Law) further compels companies to scrutinize what data is truly worth storing. Storing excessive data comes with hidden costs that extend beyond financial implications, including significant security and compliance risks.

Unused data introduces multiple risks for businesses:

- **Compliance fines** from regulatory bodies due to improper storage or handling.
- **Reputational damage** stemming from public breaches or misuse of sensitive information.
- **Cybersecurity threats** arise from unsecure, idle data pools.

The reality is clear: data minimization is safer than data accumulation. By only storing actionable and consented data, brands can improve operational efficiency while reducing legal exposure. Privacy-first thinking isn't just about adhering to regulations—it's about earning trust in a hyper-vigilant digital landscape. As the regulatory tide rises across Southeast Asia, proactive data governance must become a core competency—not a crisis response.

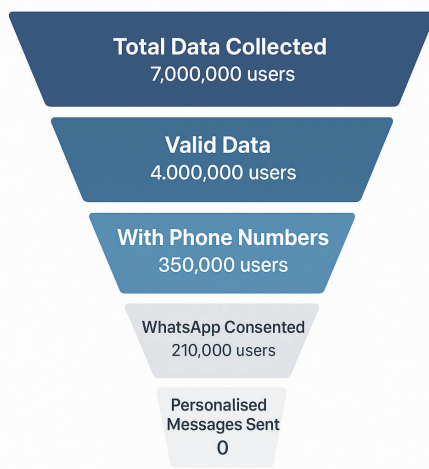
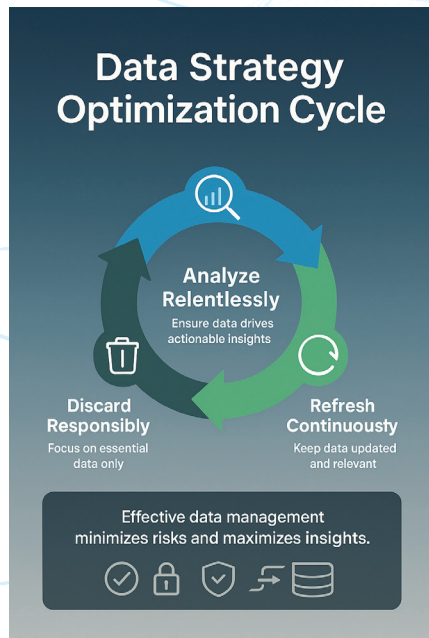
Privacy-First Is Not Optional

With regulations such as Indonesia's **UU PDP (Personal Data Protection Law)** now enforced, data privacy is no longer a technical checkbox — it's a **strategic imperative**. Brands can no longer afford to collect and hoard user data without clear intent, consent, and compliance mechanisms in place. The cost of inertia is high: financial, reputational, and legal. UU PDP mandates clear user consent, transparent data practices, and secure data storage — all of which are difficult to uphold when sitting on years of fragmented, decaying data.



Data Strategy Optimization Cycle

Brands need to adopt a cyclical approach to effective data management. **Analyze Relentlessly** ensures all collected data drives actionable insights, eliminating noise and improving decision-making. **Refresh Continuously** highlights the importance of keeping data updated and relevant in dynamic markets. **Discard Responsibly** focuses on minimizing risks by removing obsolete or irrelevant data, enhancing clarity and



compliance. Together, these steps transform raw data into intelligence.

IV. Case Study: From Data Overload to Intelligent Engagement

A leading multinational CPG company in Indonesia faced a familiar challenge: while it had amassed over 7 million customer records, only 4 million were valid, and a mere 350,000 included phone numbers. Despite this seemingly massive database, the brand struggled with limited engagement, stale attributes, and ineffective personalization.

The key issue wasn't data collection—it was data usability. With 2 million invalid records, engagement efforts were misdirected, and customer communication was increasingly irrelevant. Additionally, although the brand had secured SMS consent from most users, WhatsApp opt-ins were only 62% of that base, limiting high-engagement channel potential.

To address this, the Ogilvy One Indonesia implemented a structured Data Transformation Methodology grounded in three core actions:

Impact

35% increase in campaign engagement rates within three months

Significant uplift in WhatsApp opt-ins and click-through rates

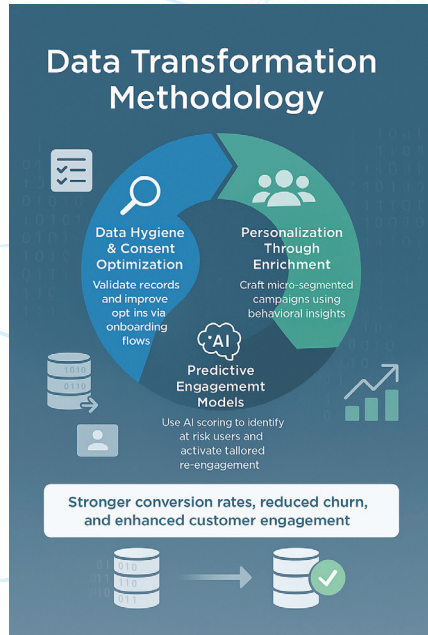
Higher ROI on media spend through improved targeting and suppression of irrelevant audiences

Increased loyalty via contextual, relevant brand experiences

This transformation illustrates how treating data as a perishable, living asset—regularly cleaned, enriched, and activated—can unlock true intelligence and customer connection, especially in fast-evolving markets like Indonesia

What Can Brands Learn?

1. Data is a perishable asset — Design systems that act before it decays.



2. Consent is the new currency — You don't own the data; you borrow it with permission.
3. Systems beat storage — It's not how much you collect, it's how much you can use.
4. Activate, don't accumulate — Build a content engine, not just a database.

V. Conclusion: Transforming Data into Intelligence

In an era where data is abundant, but attention is scarce, intelligence lies not in collecting more, but in using less—and using it better. Data should be treated not as oil, but as fresh produce: valuable, fleeting, and only worth something if consumed in time. Thriving companies are those that wield data with precision, transforming

overwhelming pools of information into actionable insights through a story-driven, customer-centric approach.

By challenging the notion that more data is always better, this mindset safeguards brands against legal and security risks while driving innovation, personalization, and meaningful customer engagement. Ask yourself: Is your data working for you, or is it weighing you down? The answer might just redefine your business strategy in this ever-evolving digital era.



AJAY TAWDE

Head of Ogilvy One Indonesia

Ogilvy One



KUKUH NUGROHO

CX Director Ogilvy One

Ogilvy One



How Affiliate Partnerships with Influencers, Content Sites and Loyalty Sites Help Indonesian Brands Maximise ROI

As high spending and fierce competition make traditional performance marketing harder across Indonesia, forward-thinking brands are finding new ways to connect with audiences and maximise their budgets. Among these, affiliate marketing is leading the way.

Indonesia today commands Southeast Asia's largest e-commerce market, valued at over USD 82 billion and growing rapidly.¹ But alongside that growth, consumers are evolving. Shoppers no longer want purely transactional relationships with brands—they want authenticity, connection, and relevance.² Traditional performance marketing methods, like paid search, display, and social media ads, continue to dominate the landscape, with social ad spending across Southeast Asia climbing toward USD 4.5 billion annually.³ Yet, while these channels deliver visibility and quick wins, the cracks are beginning to show.

Brands are under more pressure than ever to drive immediate returns. High competition and rising costs per impression are making it increasingly difficult to achieve strong conversion rates without excessive spend. In response, many brands turn to constant promotions—cashback offers, discount codes, free shipping incentives—in a bid to capture attention. While effective in the short term, these tactics come at a cost. A brand built around constant discounts risks eroding its own value, eventually being seen as interchangeable in a crowded, promotion-driven marketplace. Worse, savvy consumers have learned to anticipate sales, waiting for the next markdown rather than engaging with brands in a deeper, more loyal way.

Driving Sustainable Growth with Affiliates

Long-term success demands a smarter, more sustainable approach. This opportunity is where affiliate marketing shines. It offers brands a powerful performance-based model where they pay only for real outcomes—sales, leads, or conversions—making it a naturally cost-efficient and scalable channel. Perhaps more importantly, affiliates bring with them something that can't be bought with ad spend: trust. Through partnerships with creators, niche blogs, review sites, and loyalty platforms, brands can access audiences who already have a genuine connection with these voices.

Recent research⁴ confirms what we see every day on the ground—Southeast Asian shoppers are increasingly influenced by authentic recommendations over traditional advertising. In Indonesia, this trend is even stronger than in neighbouring markets. Affiliates and influencers hold outsized sway here,⁵ making partnerships a critical lever for brands seeking to cut through the noise and reach new customer segments more meaningfully.

A 2024 survey by Populix⁶ revealed that 59% of Indonesian consumers have purchased products promoted through affiliate marketing, highlighting its

effectiveness in influencing purchasing decisions. 88% of consumers in Indonesia have also purchased because of a recommendation from an influencer.⁷

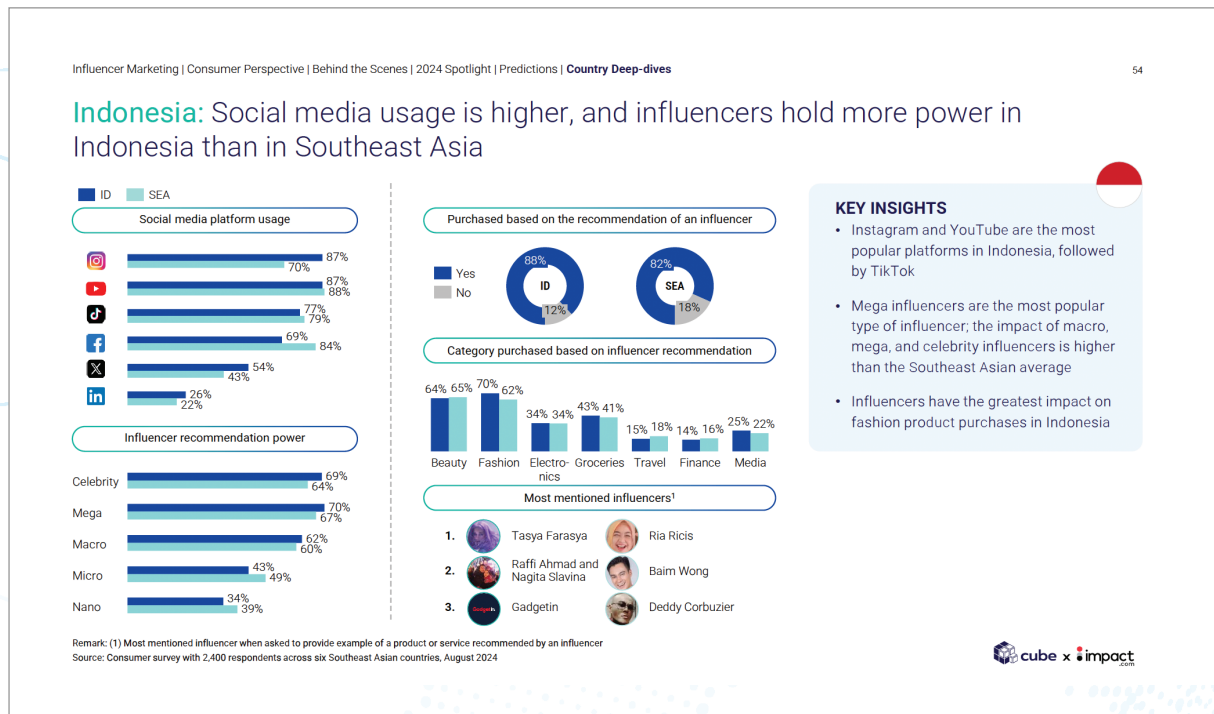


Image I: E-commerce Influencer Marketing in Southeast Asia Sector Report 2024 by Cube Asia & impact.com

While micro and nano influencers are known to have higher engagement and hyper-localised content to reach niche audiences, research has shown that mega and celebrity influencers have the highest influencing power in Indonesia. Ultimately, brands need a clear strategy for how they plan to leverage influencers—starting with well-defined goals and followed by finding creators who align with their values and resonate with their target audience.

Success in affiliate marketing, however, doesn't happen by accident. Brands need the right strategy, the right partners, and the right tools. Attempting to manage affiliate relationships manually—recruiting, contracting, tracking, and paying commissions—quickly becomes inefficient. Leading brands today are partnering with partnership management platforms to automate and streamline these processes. Dynamic commission structures, real-time performance reporting, and flexible attribution models allow brands to optimize their programs with precision.

We have seen firsthand how transformative this approach can be. PUMA, the global sportswear giant, expanded its affiliate presence across Singapore, Malaysia, and the Philippines but initially struggled with manual workflows that limited growth. By shifting to a partnership management platform, PUMA automated partner recruitment and tailored its payout structures to different affiliates, resulting in a doubling of active partners and a 250% increase in revenue.⁸

Similarly, Sephora —an influential beauty retailer in Indonesia— recognised the need to diversify their marketing mix to include affiliate marketing. However, managing partnerships across different markets in Southeast Asia, tracking performance, and optimising revenue proved to be a challenge due to its fragmented affiliate program. Without a unified system, Sephora faced hurdles such as manual workloads, limited flexibility in contracts and reporting, and needed room for greater efficiency. By consolidating their program onto impact.com, Sephora streamlined partner activation and improved overall efficiency and costs, achieving a 3X revenue growth and \$7.4m in revenue from the partners.

Conclusion

The message is clear: brands that diversify into affiliate marketing can unlock not just short-term gains but sustainable, long-term growth. It's critical to act now rather than wait for competition and rising costs to catch up. Affiliate partnerships offer a low-risk, high-reward advantage over other performance marketing strategies. They also effectively address consumers' growing demand for honesty and authenticity. Brands don't need to abandon existing channels overnight; they can start by testing affiliate programs, layering them into their broader marketing mix, and lean on experienced partnership experts to guide them.

The timing has never been better. In 2024, affiliate marketing spend in Southeast Asia was still under USD 300 million,⁹ a fraction of the USD 4.5 billion spent on social ads.¹⁰ There is enormous room for growth, particularly in Indonesia, where online shoppers are hungry for trusted recommendations and real connections with the brands they choose.

Affiliate marketing, and the broader partnership economy, isn't just an emerging trend; it's the future of sustainable growth in Indonesia and across Southeast Asia. For brands willing to invest today, the rewards will be transformational.

¹Statista. "E-commerce in Indonesia - Statistics & Facts." Statista, <https://www.statista.com/topics/5742/e-commerce-in-indonesia/>.

²Statista. "Social Media Advertising - Southeast Asia." Statista Market Insights, <https://www.statista.com/outlook/amo/advertising/social-media-advertising/southeast-asia>.

³Statista. "Social Media Advertising - Southeast Asia." Statista Market Insights, <https://www.statista.com/outlook/amo/advertising/social-media-advertising/southeast-asia>.

⁴Statista. "Influencer Advertising - Southeast Asia." Statista Market Insights, <https://www.statista.com/outlook/amo/advertising/influencer-advertising/southeast-asia>.

⁵impact.com. "2024 Southeast Asia E-commerce Influencer Marketing Report." impact.com Research Reports, <https://impact.com/research-reports/2024-southeast-asia-ecomm-influencer-marketing-report-infl-rrt-crb-ed-sea/>.

⁶Jakarta Daily. "Affiliate Marketing on the Rise: 59% of Indonesians Have Purchased Products through Affiliate Promotions." Jakarta Daily, <https://www.jakartadaily.id/business/16213613956/affiliate-marketing-on-the-rise-59-of-indonesians-have-purchased-products-through-affiliate-promotions>.

⁷impact.com. "2024 Southeast Asia E-commerce Influencer Marketing Report." impact.com Research Reports, <https://impact.com/research-reports/2024-southeast-asia-ecomm-influencer-marketing-report-infl-rrt-crb-ed-sea/>.

⁸impact.com. "PUMA Scales Affiliate Partnerships with impact.com." impact.com Case Studies, <https://impact.com/case-studies/puma-case-study-affa-csb-imp-ev-sea/>.

⁹Cognitive Market Research. "Asia-Pacific Affiliate Market Report." Cognitive Market Research, <https://www.cognitivemarketresearch.com/regional-analysis/asia-pacific-affiliate-market-report>.

¹⁰Statista. "Social Media Advertising - Southeast Asia." Statista Market Insights, <https://www.statista.com/outlook/amo/advertising/social-media-advertising/southeast-asia>.



ADAM FURNESS

APAC Managing Director





Activating the **3Cs:** Conversations, Commerce, and Community at Scale for Effective Social Marketing

I. Introduction

In today's digitally connected landscape, brands and marketers face growing complexity in effectively leveraging social channels. As the attention spans of consumers continue to shrink and content is more saturated now than ever before, brands must find more effective ways to break through the noise and deliver value.

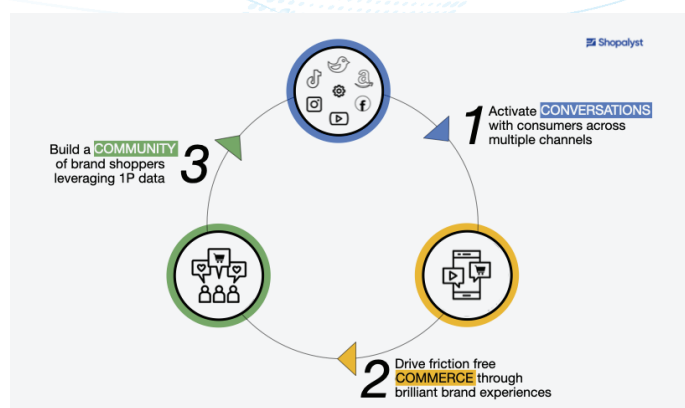
Inside Today's Market Landscape

Indonesia is emerging as a social commerce powerhouse, with over 143 million active social media users¹ —the largest in Southeast Asia and third-largest in Asia-Pacific. Indonesians spend an average of 3 hours and 8 minutes daily on social platforms,² using them not just for connection and entertainment, but also as a primary source of information and shopping inspiration. 48.8% use social media to stay updated on trending topics, making it a key information channel.³ The rise of mobile commerce and creator-driven engagement is fueling Indonesia's social commerce market, expected to hit \$5.25 billion by 2025.⁴ As platforms like Instagram, TikTok, and Facebook become central to product discovery and transactions, brands that activate personalized experiences and frictionless shopping journeys are best positioned to win in this dynamic market.

II. From Scrolling to Shopping: The 3Cs of Social Marketing

To address these challenges, brands must embrace a holistic approach to social marketing—one that activates the full spectrum of social engagement through Conversations, Commerce, and Community. This article explores how scaling these three pillars (the 3Cs) across social platforms can help brands increase reach, relevance and revenues to drive brand growth:

- Activating Conversations at scale across multiple channels
- Connecting conversations on social to Commerce through brilliant brand experiences that are friction-free
- Building a Community of brand shoppers by acquiring, organizing and leveraging first-party audience data (1P data).



Activating Conversations at scale across multiple channels

To effectively reach consumers on social media, brands need to activate conversations with consumers across multiple channels (FB, IG, TikTok, YouTube etc.). Given how fragmented media is today, brands and advertisers need to use solutions that enable them to activate conversations across these channels in an automated way while preserving context.

One such example of success is how a large multi-channel advertiser leverages Shopalyst to automate their campaign setup, reporting and optimisation, to drive media effectiveness and efficiencies of 20%+ across three diverse media platforms, 40+ brands, 1500+ campaigns, 2900+ line items.

 | CONSUMER PRODUCTS 

"The implementation of Shopalyst led to media efficiencies of 20-22% across campaigns. In addition to this, setup time was cut in half and set up accuracy was at 100%. This unlocked monetary value for the business by reducing the cost of reaching

2X Efficiency of campaign setup, reporting and optimisation

> 22% Effectiveness of media spend

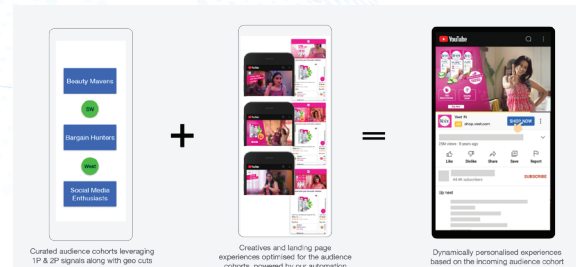


NITHYA RAVI
AVP, GLOBAL MEDIA
GCPL

Connecting Conversations to Commerce

Brands need to connect conversations to commerce in a seamless and immersive fashion. Shopalyst enables this today with its ACE Framework:

- **Audiences:** Increase targeting relevance by reaching high-intent audiences on popular media platforms backed by shopper intent.
- **Creatives:** Use product-aware creatives that bring in relevant information like the product packshot, price, ratings, availability, benefits etc., to drive higher consideration from your ads.
- **Experiences:** Connect your brand ads to personalised and immersive brand experiences based on the campaign context that bring in the best of brand content and a multichannel shopping experience for the consumer.



Example of how a brand leveraged ACE to drive success on digital

Building a *Community* of brand shoppers

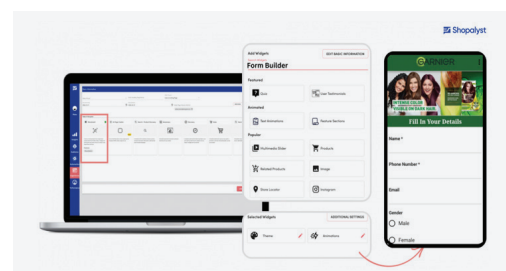
Brands need to build their own community through first-party data acquisition to build lasting relationships and lifetime value with consumers by focusing on the following:

Acquire: Every interaction on a brand-owned asset is an opportunity to gather valuable audience data. Marketers can use tools like anonymous tracking pixels and incentivized value exchanges to identify signals of purchase intent and, where appropriate, encourage users to share their personal data in privacy-compliant ways.

Organize: Each engagement with a consumer reveals insights into their preferences, expectations, and motivations. By analyzing these interactions, brands can segment audiences more effectively, allowing for more personalized and relevant communication across the customer journey.

Deploy: Delivering the right message to the right audience at the right time remains a cornerstone of effective marketing. Data-driven targeting strategies, when deployed efficiently across major platforms such as Google, Meta, and TikTok, can help brands maximize the impact of their campaigns and improve return on investment.

An example of success is how a global hair care brand ran a large-scale offline campaign to build a community of 500k+ brand shoppers. The brand experience powered by Shopalyst collected user registration data like email ID, OTP-verified phone numbers, survey questions etc., in-line with market requirements on data consent, security and privacy. The brand's first-party data through this campaign was also seamlessly integrated with their customer data platform (CDP). This was used to create custom audience segments, which were then activated across platforms like Meta and Google using data-driven targeting.



Conclusion

In a saturated digital marketplace, activating Conversations, Commerce, and Community at scale is no longer optional—it is essential for brands to succeed on social. Brands that adopt an integrated 3C strategy can meaningfully engage with consumers to transform passive browsing into conversations that lead to commerce and build loyal brand communities.



¹Nurhayati-Wolff, H., (2025). Social media in Indonesia - statistics & facts. Statista. Retrieved from: <https://www.statista.com/topics/8306/social-media-in-indonesia/#topicOverview>

²Ibid.

³Howe, S., (2024). Social Media Statistics for Indonesia [Updated 2024]. Meltwater. Retrieved from: <https://www.meltwater.com/en/blog/social-media-statistics-indonesia>

⁴Globe Newswire. (2025). Indonesia Social Commerce Market Intelligence Report 2025-2030: Mobile Commerce Dominates, Authenticity and Personalization Key to Growth. Globe Newswire by notified. Retrieved from: <https://www.globenewswire.com/news-release/2025/05/12/3079272/0/en/Indonesia-Social-Commerce-Market-Intelligence-Report-2025-2030-Mobile-Commerce-Dominates-Authenticity-and-Personalization-Key-to-Growth.html>



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Brand Solutions Lead

 **Shopalyst**



Brand Safety 3.0: Moving from Avoidance to Proactive Alignment

With growing digitalization, the definition of brand safety has evolved from simply avoiding controversial content to ensuring meaningful, context-aware placements. In a digitally active market like Indonesia, where over 212 million people consume online content daily, the risks are amplified. Poorly managed brand safety led to estimated advertiser losses of \$898 million in 2020 due to ads appearing next to unsuitable or unsafe content.

Instead of avoiding controversies, brand safety now includes intentional alignment with new-age content, creators, and causes that amplify trust. In Indonesia, the average brand risk is comparatively higher than the global averages (8.2% compared to the worldwide average of 4.4%), thereby underlining the importance of introducing brand safety reforms.

As we enter the new age of brand safety (3.0), shifting from avoidance to alignment opens up a new frontier where media placement is a critical aspect of brand integrity strategy.

The Evolution of Brand Safety

There has been a significant transformation in this field in the past ten years. Brand safety has become more context-aware in the presence scenario.

Brand Safety has evolved from broad exclusions (1.0) to smarter keyword-based targeting (2.0), and now to a more strategic, value-driven approach (3.0). In this new phase, brands don't just avoid risk—they actively align with trusted content, support diverse voices, and participate in meaningful cultural conversations. It's about building trust, not blocking it.

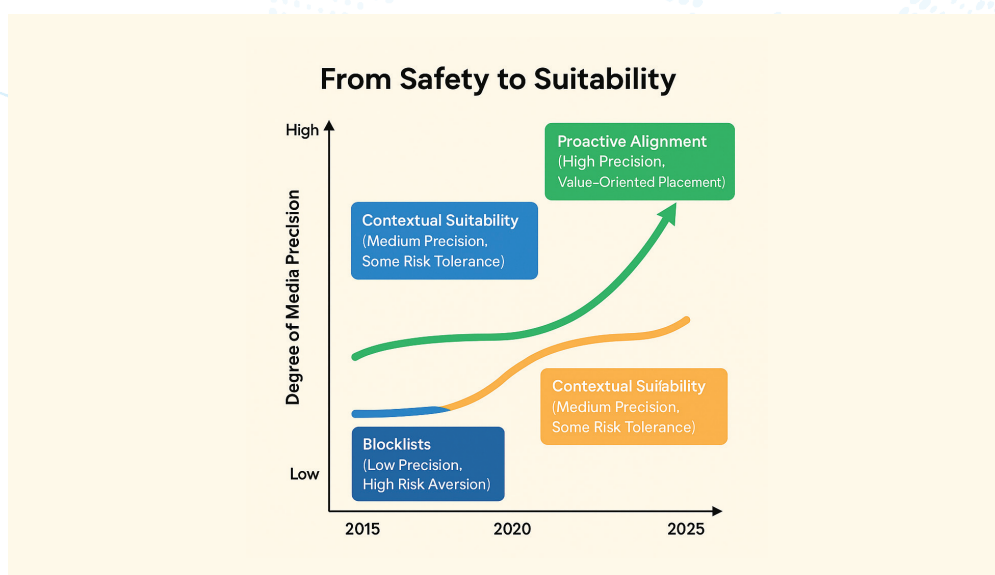


Figure 1.0: Movement from Safety to Suitability, DM Pratama Internal Data

Why Reactive Brand Safety Falls Short

Traditional reactive brand safety, built on blocklists and keyword exclusions, often limits reach and misses valuable opportunities by broadly blocking entire topics: regardless of context or sentiment. As digital content consumption grows, this outdated approach can disconnect brands from credible sources like quality journalism or community narratives, especially around nuanced topics like conflict, LGBTQ+, or politics. It may also filter out positive content, such as environmental advocacy, due to rigid keyword rules. In today's mindful media environment, brands must move beyond avoidance and adopt precise, context-driven strategies to protect credibility and build trust.

What Proactive Alignment Looks Like?

Brand Safety 3.0 shifts the focus from avoiding risky content to actively seeking platforms that align with a brand's values, tone, and audience. It turns brand safety into a proactive, strategic tool for building trust, relevance, and long-term impact.

Tools & Strategies Enabling Brand Safety 3.0

For businesses, enabling Brand Safety 3.0 is not just about intent; but there is a need for smart tools. Here are a few tools and strategies which advertisers can introduce to enable Brand Safety 3.0:

Tool Category	Key Use Case	Leading Platforms
Contextual Intelligence	Analyze content meaning, sentiment, and tone	GumGum, Peer39, Zefr
Sentiment & Semantic Analysis	Detect brand-safe tone and emotional resonance	IBM Watson, Advanced IAS modules
Verification & Suitability Scoring	Ensure content alignment, block unsafe placements	IAS, DoubleVerify, MOAT
Brand Suitability Filters	Custom controls for DEI, ESG, or local sensitivities	YouTube Dynamic Exclusion Tool, Zefr
Fraud & Viewability Protection	Combat invalid traffic, ensure ads are seen	DV, MOAT, HUMAN

Measuring Safety and Suitability ROI

Brand safety today is not just a cost but a performance driver for modern enterprises. When brands align with meaningful, contextually relevant content, they see measurable improvements in ad recall, trust, and engagement—reflected in KPIs like brand lift, better sentiment, higher CTRs, and stronger attention metrics. This alignment ultimately enhances long-term brand equity and trust.

A recent [neuroanalytics study](#) concluded that contextually relevant ads generate 43% more neural engagement. This is especially impactful in content-heavy industries like FMCG and automotive, where emotional resonance and timing drive consumer decisions. For example, a sustainability-focused detergent ad with eco-lifestyle content outperformed generic placements by a double-digit lift in recall and intent.

Similarly, podcast-based advertising, which is increasingly popular in Indonesia's urban metros, [boasts a 71% aided brand recall rate](#), making it a marketer's dream for industries like fintech, health and wellness, and education, where trust and relatability are key. Podcasts' intimate, story-driven format creates a high-engagement environment ideal for deeper brand connection.



Figure 2.0: Brand Safety and Internal Alignment, DM Pratama Internal Data

Conclusion: Building an Internal Framework for Alignment

Brand Safety 3.0 goes beyond media; it's a cross-functional effort uniting Marketing, Legal, DEI, CSR, and Media teams under shared brand values. Instead of just avoiding risk, brands must proactively align with purposeful content. With clear suitability guidelines, regular audits, and accountability tools, safety becomes a growth lever. In 2025, standing for something matters more than hiding from everything



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How Unified Platforms Ensure Brand Safety in the Streaming Era

Indonesia's OTT marketplace is projected to reach **\$4.45 billion** by 2027, growing at a remarkable CAGR of 33.1%. As audiences increasingly shift toward streaming platforms, brands find limitless opportunities to engage highly involved viewers; however, it comes with the rising challenge of brand safety. With content proliferating across numerous apps, channels, and devices, advertisers face increasing difficulties in ensuring their messages appear in suitable contexts.

To address these challenges, Unified Advertising Platforms (a one-stop solution for all ad campaigns) have emerged as a vital solution by providing centralized control over ad placements, unlike traditional methods that rely on managing multiple platforms and inventory sources. This consolidation ensures consistency in brand safety protocols and offers full transparency on where ads are being displayed. With a single dashboard, advertisers can manage their campaigns across multiple channels and devices, facilitating real-time decision-making and swift responses to any emerging issues.

Safeguard Brand Integrity

One of the key strengths of these platforms lies in their integration with premium, vetted inventory sources and with **OTT video advertising**, anticipated to generate \$810.6 million in 2025; finding the right inventory partner is imperative. By prioritizing quality over quantity, it mitigates the risks of ads appearing alongside inappropriate or low-quality content, an essential feature in the streaming space, where content can vary widely in tone, audience, and purpose. Unified platforms act as safeguards, aligning brand messages with trusted content that embodies a brand's values and resonates with its target audience.



How AI Powers Ad Integrity on Unified Platforms

In addition to providing access to premium inventory, unified platforms utilize multi-layered verification methods to combat ad fraud and content misalignment. By leveraging a combination of AI-driven contextual analysis, semantic scanning, and context recognition, these platforms assess content in real time to verify its suitability. Third-party verification partners are often integrated to add an extra layer of trust, ensuring ads are not just placed safely but effectively. This robust verification framework significantly reduces exposure to invalid traffic, spoofed domains, and deceptive ad placements.

Real Time Monitoring for Smarter Campaigns

Another significant feature is real-time monitoring and reporting in Unified platforms that grant advertisers granular insights into campaign performance, not only in terms of impressions and clicks but also regarding viewability, engagement quality, and content relevance. This dynamic feedback loop plays a key role in detecting potential risks and helps brands continuously improve their campaigns, ensuring safety and effectiveness throughout the entire campaign lifecycle.



Ad Strategies for the Streaming Age

Also, advertisers looking to elevate their streaming advertising strategy need to consider a few key insights. Firstly, context has become equally important as audience data and targeting ads based on content relevance, drawing from real-time sentiment and contextual cues can significantly improve brand alignment and [viewer reception](#).

Metrics	Insights
APAC contextual Ad market CAGR (2024 - 2032)	15.1%
Global contextual Ad market size (2024 - 2025)	\$211.62B → \$233.89B
Contextual ad tool adoption (APAC, July 2024)	+20% in first month
Google contextual Ad engagement lift (APAC, Aug 2024)	+30% in first month
APAC contextual Ad market CAGR (2024–2032)	High, drives engagement

Source: S&SInsiders & The Business Research Company

Secondly, relying solely on traditional safety filters may not be enough anymore; Brands should consider using platforms that leverage advanced content analysis tools to effectively assess tone and sentiment for a more nuanced understanding of the content. [Measurement metrics](#) have also evolved past traditional KPIs as today's unified platforms can assess brand sentiment, post-view behavior, and emotional engagement for streamlined campaign operations.



Conclusion

With rising digital risk, unified platforms have become essential for secure and scalable advertising in the streaming era, as they safeguard brand personas while empowering advertisers to make smarter and more strategic ad decisions. For brands looking to deliver meaningful, brand-safe experiences at scale, unified platforms are not merely a solution, they represent the future of secure and scalable advertising.

‘By addressing loopholes and implementing best practices, advertisers can navigate this complex landscape effectively and ensure their messaging is impactful and secure’.



EDO FERNANDO

Country Head, Indonesia





Scaling Brand Safety and Suitability in the Age of Smart Screens: A CTV Perspective from Indonesia

Connected TV (CTV) has evolved into one of the most powerful platforms for media consumption. In 2025, CTV content consumption in Indonesia grew by 12 to 15 percent, marking a major shift in how audiences engage with digital video.

This rising investment underscores how CTV is moving from an emerging channel to a cornerstone of media strategy worldwide. For brands, this growth is more than a shift in screen size — it is a shift in mindset. This robust verification framework significantly reduces exposure to invalid traffic, spoofed domains, and deceptive ad placements.

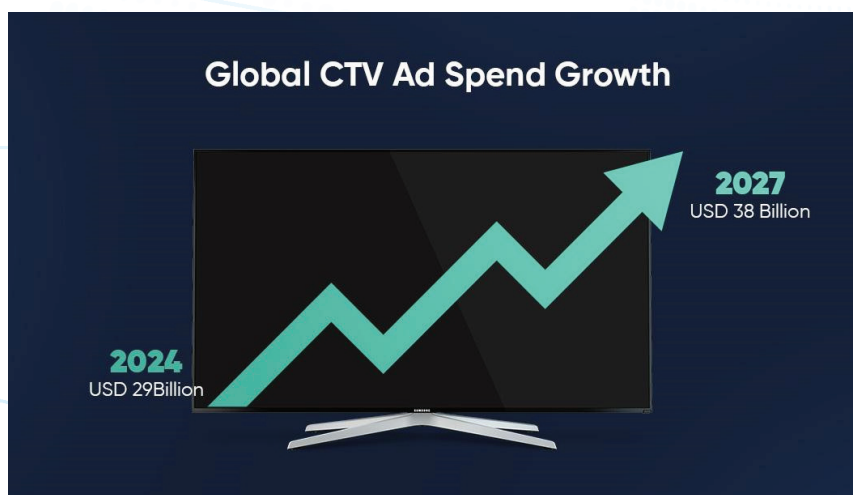


Image I: Global CTV Ad Spend Growth 2024-2027²

Viewers in Indonesia are spending significantly more time with long-form content on the largest screen in their homes, mirroring broader Southeast Asia trends. For advertisers, this shift creates rich opportunities to connect with audiences in a more immersive environment. However, it also brings a complex set of challenges to the forefront. Unlike traditional television, where content is pre-vetted and uniform, CTV presents a highly fragmented environment made up of user-generated content, niche streaming services, and long-tail publishers.

This fragmentation raises critical brand safety concerns. Traditional broadcast standards that once worked for linear TV simply do not scale for the dynamic, diverse landscape of CTV. What qualifies as “safe” content can vary greatly—not just by brand, but by campaign type, industry, and local culture. In a culturally layered market like Indonesia, ensuring brand suitability requires far more nuance. Brands today need advanced contextual intelligence to not just detect what is being watched, but to deeply understand how content aligns with their values and consumer intent.

Why Strategic Placements Define CTV Success in Indonesia

In this evolving landscape, strategy becomes a defining factor for success. As one industry leader aptly put it, "Every win with CTV has come from placing it strategically." Winning today hinges on delivering ads in the right environment at precisely the right moment.

In Indonesia, this need is especially clear. In 2024, digital channels captured 75% of total ad spend, with the market valued at approximately USD 3.04 billion.^{3 4}

YouTube ads alone reached 75% of the country's internet users, while social media advertising attracted USD 1.24 billion, making it the top digital format by investment.⁵

To lead in this environment, the modern approach to CTV advertising combines contextual intelligence with flexible brand safety controls. Advertisers can now tailor placements according to specific risk thresholds, integrating rich contextual segments with GARM (Global Alliance for Responsible Media)-aligned risk filters to ensure precise control over the content their ads appear alongside.

This system dynamically adapts based on key factors:

- **Campaign goals**, whether focused on brand lift, conversions, or engagement
- **Audience behavior**, such as cross-platform consumption and shifting content patterns
- **Cultural sensitivity**, ensuring ad resonance within diverse societal norms, and no expectations

For example, a brand operating in the alcohol category may intentionally place ads in contexts that are high-risk for others but entirely appropriate for their target audience. This real-time adaptability enables brands to balance protection with contextual relevance, ensuring smarter engagement without sacrificing brand safety.

AI-Powered Programmatic Integration for a Smarter CTV Strategy

To meet the demands of CTV's expanding ecosystem, AI-powered solutions are now integrated into programmatic workflows. Machine learning models dynamically optimize ad placements by analyzing content context, audience behavior, and real-time engagement metrics.

This evolution is critical in markets like Indonesia, where CTV adoption is accelerating at pace. Seven out of ten Indonesian consumers now have access to Connected TV.⁶ Moreover, 92% of Indonesians report streaming YouTube on TV screens, spanning smart TVs and connected devices. Platforms like Vidio are also seeing significant engagement, with viewers spending an average of 150 minutes per day consuming CTV content.⁷

In this dynamic environment, AI integration ensures ads are not just broadly targeted but fine-tuned to resonate with consumer intent, platform behavior, and cultural context. Precision-driven targeting improves brand safety, enhances campaign performance, and fosters deeper consumer engagement.

Reinforcing Brand Relevance and Protection

The impact of advanced contextual intelligence is profound. Advertisers are no longer limited to broad targeting methods or static safety lists. Instead, they can implement flexible frameworks that adapt dynamically as content trends shift, preserving both brand relevance and protection.

Maintaining brand relevance is critical—not only to secure engagement but also to uphold brand trust. A poorly placed ad can jeopardize years of reputation-building, while contextually relevant placements enhance credibility and strengthen consumer relationships.

This urgency is heightened by rapid smart TV adoption. By 2027, nearly half of the world's smart TV shipments are expected to be directed toward Asia-Pacific markets, including Indonesia.⁸ In such an environment, brands must be prepared to navigate complexity, safeguard their messaging, and maintain cultural resonance across a broad spectrum of content.

Conclusion

CTV is no longer just a platform for scale; it is a strategic channel for responsible, relevant engagement. In Indonesia, where digital behavior is evolving rapidly, success will belong to brands that prioritize precision, cultural sensitivity, and contextual intelligence. With the right strategies and tools, advertisers can ensure every ad placement does more than just reach an audience. It can reinforce brand integrity, build trust, and create meaningful moments that drive long-term impact.

As global platforms and demand-side partners evolve, pre-bid CTV segments aligned with brand suitability and contextual relevance are

enabling advertisers to activate smarter, more intentional campaigns from the outset. The future of CTV advertising belongs to those who embrace adaptability, precision, and the power of context.

¹MMA Innovate 2025. (2025). The Rise of Connected TV (CTV) and Ramadan's Impact on Digital Advertising. Retrieved from:

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⁶Affle. (n.d.). Omnicom Media Group Indonesia partners with Affle's mediasmart platform to bring programmatic and Connected TV (CTV) advertising to Indonesia. Retrieved from:

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The Future of OTT and Connected TV in Indonesia:

Trends, Growth,
and Brand
Safety

I. Introduction

Indonesia's digital transformation has accelerated, with Over-The-Top (OTT) and Connected TV (CTV) emerging as dominant media platforms. As consumers shift from traditional broadcast television to internet-based streaming, brands are re-evaluating their advertising strategies. We explore the growth trajectory of OTT and CTV, their impact on consumer behavior, and best practices for ensuring brand safety in this evolving ecosystem.

II. Growth of OTT and Connected TV in Indonesia

1. The Analog Switch-Off (ASO) initiative has significantly enhanced Free-to-Air (FTA) TV reception and expanded digital TV reach across Indonesia. According to Nielsen data, digital TV penetration has now reached 97% in 11 major cities, with an additional 28% of cities and regencies still to be covered (Nielsen, March 2023). This has contributed to a 17% increase in the overall TV population. Since the ASO implementation in 2022, FTA TV viewing hours have continued to rise, and TV ownership remains higher than both internet penetration and smartphone ownership. As a result, FTA TV remains the leading platform for Indonesians.

These findings underscore the rapid adoption of digital TV in Indonesia following the ASO initiative.

2. FTA TV is accessible beyond terrestrial broadcast, reaching a vast population through multiple platforms
 - **Terrestrial:** 221 million
 - **PTV & LCO/Cable TV:** 33 million
 - **Satellite/DTH:** 60 million
 - **Premium OTT:** 25 million

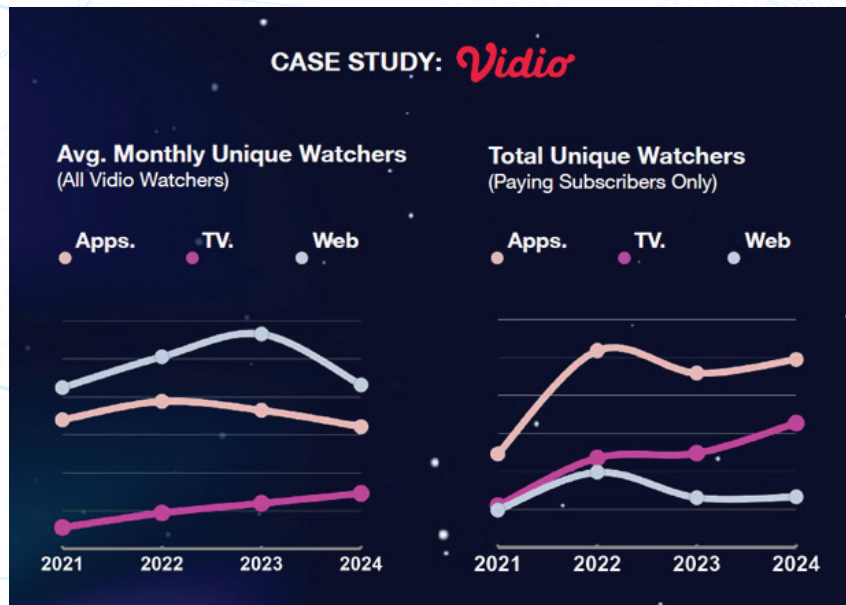


Terrestrial TV remains the most far-reaching platform for FTA content in Indonesia, reaching 221 million people. This dominance can be attributed to its accessibility and affordability—no monthly subscriptions or internet connectivity are needed, making it ideal for rural and lower-income communities. The infrastructure for terrestrial broadcast is widespread and long-established, ensuring consistent coverage even in remote areas. In contrast, platforms like Satellite/DTH, IPTV, Cable, and OTT require additional hardware or internet connections, which may not be uniformly available or affordable across the archipelago. The significant gap in reach highlights terrestrial TV's continued role as the primary medium for mass communication, public service messaging, and entertainment nationwide



Vidio has solidified its position as Indonesia's leading OTT platform, surpassing global competitors with the highest number of subscribers and monthly active users in the country. Its strategic partnerships with major Smart TV brands, enabling pre-installed access, have been instrumental in driving growth, especially in the Connected TV (CTV) segment.

The strength lies in its robust local content production, with over 100 original series targeted by the end of 2025, and its dominance in premium local entertainment, consumer spending, app downloads, and video engagement. The platform's success in CTV is particularly notable, with this format now being the fastest-growing audience segment. Among paid subscribers, CTV usage shows even higher growth, reflecting a shift toward premium, immersive viewing experiences. On average, users watch 150 minutes per day via Smart TVs, significantly longer than on mobile (55 minutes) or web (20 minutes). Vidio effectively leverages this extended watch time to optimize ad placements and boost brand engagement, reinforcing its leadership in Indonesia's streaming landscape.



Content localization has emerged as a key trend shaping viewer engagement in Indonesia's OTT landscape. With 39% of the top-performing content originating from local productions, it's clear that Indonesian audiences strongly resonate with stories that reflect their culture, language, and daily life. This preference surpasses even the popularity of globally dominant content like Korean dramas and international series, highlighting the importance of local relevance in content strategy. OTT platforms that invest in original Indonesian productions are not only meeting audience demand but also fostering deeper emotional connections and loyalty. As a result, content localization is proving to be a powerful driver of engagement, viewership, and long-term platform success in the increasingly competitive OTT market.



III. Conclusion

Indonesia's OTT and Connected TV landscape is evolving rapidly, driven by digital transformation, the Analog Switch-Off (ASO) initiative, and growing consumer demand for accessible, high-quality content. While Free-to-Air (FTA) TV still dominates in terms of reach, especially through terrestrial broadcast, OTT platforms like Vidio are reshaping how Indonesians consume entertainment, particularly through Connected TVs. Vidio's success highlights the power of strategic partnerships, local content production, and premium user experiences in capturing market leadership. As viewer preferences shift toward more personalized and immersive content, localization and platform accessibility will be key differentiators. For brands navigating this dynamic environment, embracing the rise of OTT and CTV, while prioritizing brand safety, will be essential to connect with today's digital-first Indonesian audience.



EDWARD MULIANTO

CEO Super Fantasy/VP Growth,
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Indonesia Takes DOOH Global with Bold Local Storytelling

How creativity, inclusion, and cultural relevance can transform Indonesia's DOOH into a global export

Southeast Asia is fast becoming a hub for Digital Out-of-Home (DOOH) innovation, with cities like Singapore and Bangkok adopting tech-driven, creative-first approaches. Indonesia, by contrast, stands at a unique crossroads - not lagging, but facing a scale of opportunity unlike any other. Its DOOH presence spans dense cities and emerging towns, yet much of what plays across Indonesia's digital inventory remains broad, centralized, and culturally narrow - missing the opportunity to engage audiences more deeply and authentically.

As GLOOH (Global Out-of-Home) platforms enable campaigns to go borderless, Indonesian brands are now positioned to speak to global audiences. But to seize this opportunity, Indonesian DOOH must shift - from a screen-first to a story-first approach, fueled by big ideas, creative boldness, and inclusive narratives that can resonate both at home and globally. This transition can turn Indonesia from a passive participant to a creative powerhouse in the global DOOH landscape.

The science behind standout screens

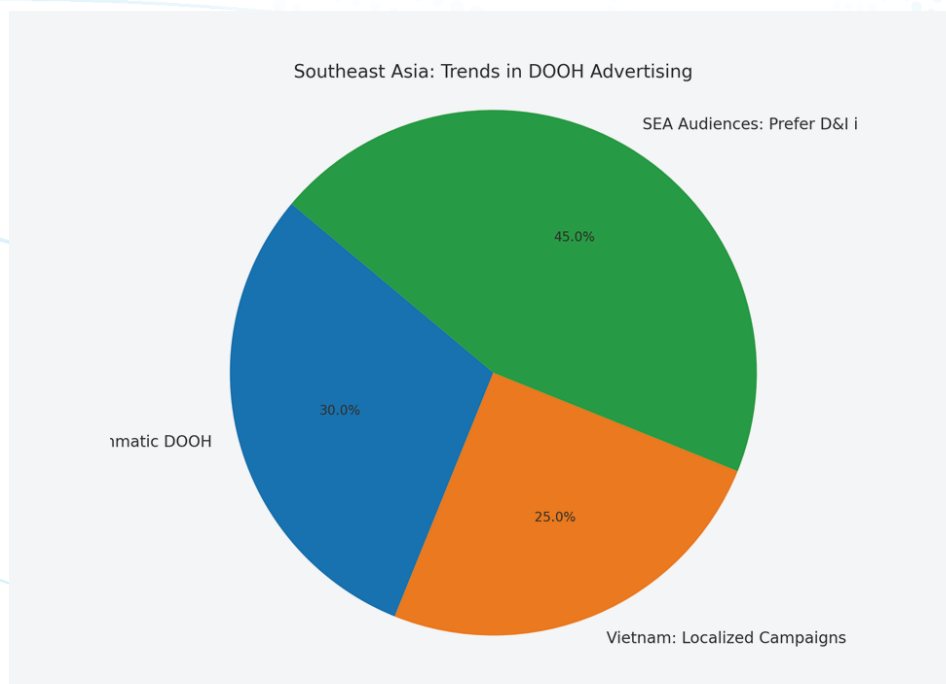
DOOH campaign innovation draws from behavioral science, creative disruption, and inclusive design. Jean-Marie Dru's concept of creative disruption emphasizes the power of bold, unexpected ideas to break through high-noise environments - especially relevant in outdoor advertising. Inclusive design ensures that content resonates across age, background, and ability. In the GLOOH context, campaigns must connect locally and emotionally across cultures to truly travel.



Indonesia's OOH and DOOH market is forecasted to grow from USD 334.67 million in 2025 to USD 458.52 million by 2030, at a CAGR of 6.5%. This growth trajectory suggests rising adoption of digital formats, yet the content innovation curve is lagging.

In comparison:

- **Singapore** and **Thailand** have already mainstreamed programmatic DOOH, allowing for real-time creative optimization.
- **Vietnam** has seen over **50% of national campaigns** adopt localized content and dialects in 2023.
- A study across Southeast Asia found **72% of audiences** are more likely to engage with advertising that reflects diversity and inclusion.



Meanwhile, Indonesian DOOH remains largely centralized in its messaging and disconnected from the rich cultural layers of its population. Simultaneously, **Indonesian brands are underutilizing global DOOH platforms**, missing the opportunity to target international markets and diasporic audiences.

Bridging gaps with bold moves toward GLOOH-ready creativity

To bridge these creative and strategic gaps - and to elevate Indonesia's standing in the GLOOH landscape - the following industry-wide shifts are essential:

- **Design locally, Think globally**
Campaigns must be culturally rooted but conceptually universal. When crafted with authenticity, local narratives become exportable - resonating with audiences far beyond their origin country. This is key to building GLOOH-ready creative.
- **Integrate with GLOOH ecosystems**
Agencies and media buyers in Indonesia should connect with global DOOH platforms to gain access to international inventories and audiences. From targeting Indonesian diaspora in the UAE to running festive campaigns in multicultural cities like Sydney or Toronto - this is now possible, instantly.
- **Diversify creative inputs**
Open the brief. Engage regional creators, community voices, and underrepresented groups in campaign development. This not only enhances authenticity but helps meet global inclusivity standards increasingly demanded by international markets.
- **Use contextual triggers and real-time optimization**
Employ dynamic creative that adapts to time of day, weather, or location-specific behavior. This is already being done in Singapore and London - Indonesia can leapfrog into parity with the right tools.
- **Establish Indonesia as a creative export hub**
The creative industry should embrace DOOH not only as a local advertising channel but as a creative export platform. Regional and global brands are looking for fresh narratives - and Indonesia has the talent and cultural depth to deliver them.

Global Thinking, Local Impact: Indonesia's DOOH Strategy

A dynamic DOOH ecosystem blending innovation and global reach fuels higher engagement, economic returns, and creative leadership in Southeast Asia.

Key Outcomes:

- Stronger local engagement - Cultural relevance boosts recall and emotional impact.
- Expanded global presence - GLOOH platforms connect Indonesian brands to diaspora audiences.
- Creative leadership - Agencies embracing diversity gain regional influence.
- Optimized ad spend - Targeted campaigns improve efficiency locally and internationally.

Case Study: During Ramadan, an Indonesian FMCG brand tailored DOOH content to sahur and iftar times, reflecting local traditions. Expanding to Dubai and Kuala Lumpur, the campaign resonated across borders, driving higher engagement and brand affinity.

This proves that localized storytelling with universal themes is the key to impactful DOOH.

A DOOH ecosystem built on campaign innovation and global integration can yield the following outcomes: Indonesia stands at the threshold of becoming not just a large DOOH market, but a creative force within the GLOOH movement. With its vast culture, diverse population, and expanding digital infrastructure, it has the ingredients to lead Southeast Asia in campaign innovation - provided it pivots toward ideas that are big, bold, inclusive, and exportable.

By embracing a globally-minded approach to creativity, Indonesian advertisers can transform local billboards into global showcases - turning DOOH from a static medium into a dynamic platform for influence, identity, and imagination on a worldwide scale.

<https://www.statista.com/outlook/amo/advertising/out-of-home-advertising/indonesia>

TBWA's Jean Marie Dru on the future of disruption as a catalyst for creativity | The Drum
Languages Spoken in Vietnam: Beyond Vietnamese



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Indonesia's Retail Media Reckoning:

Data-Driven
Growth in the
World's
Fastest-Rising
Market

Retail Media Networks (RMNs) are rapidly emerging as Indonesia's most promising full-funnel digital channel. Yet many brands, especially non-endemics, are still underleveraging their potential. This article outlines where RMNs are growing, who's winning, and what CMOs must do now to turn this channel into a strategic growth engine.

Retail Media's Rise: Indonesia Outpaces the Global Curve

Retail media spend in Indonesia is projected to grow by **219% from 2023 to 2030**, with a **CAGR of 13.41%**, nearly double the global rate.¹ By 2025, retail media will account for **17.8% of total advertising spend**, contributing to a digital market expected to hit **USD 6.4 billion**.²

Platforms leading Indonesia's retail media surge includes **Tokopedia, Shopee, Lazada and TikTok Shop**, each offering massive audiences, shoppable ad formats, and first-party data that ties media to transaction. These ecosystems are evolving into full-funnel media environments where brands can build awareness and drive conversion in a single journey.

In Indonesia, commerce media is helping brands connect brand equity and performance in real-time but only when teams align strategy and execution.

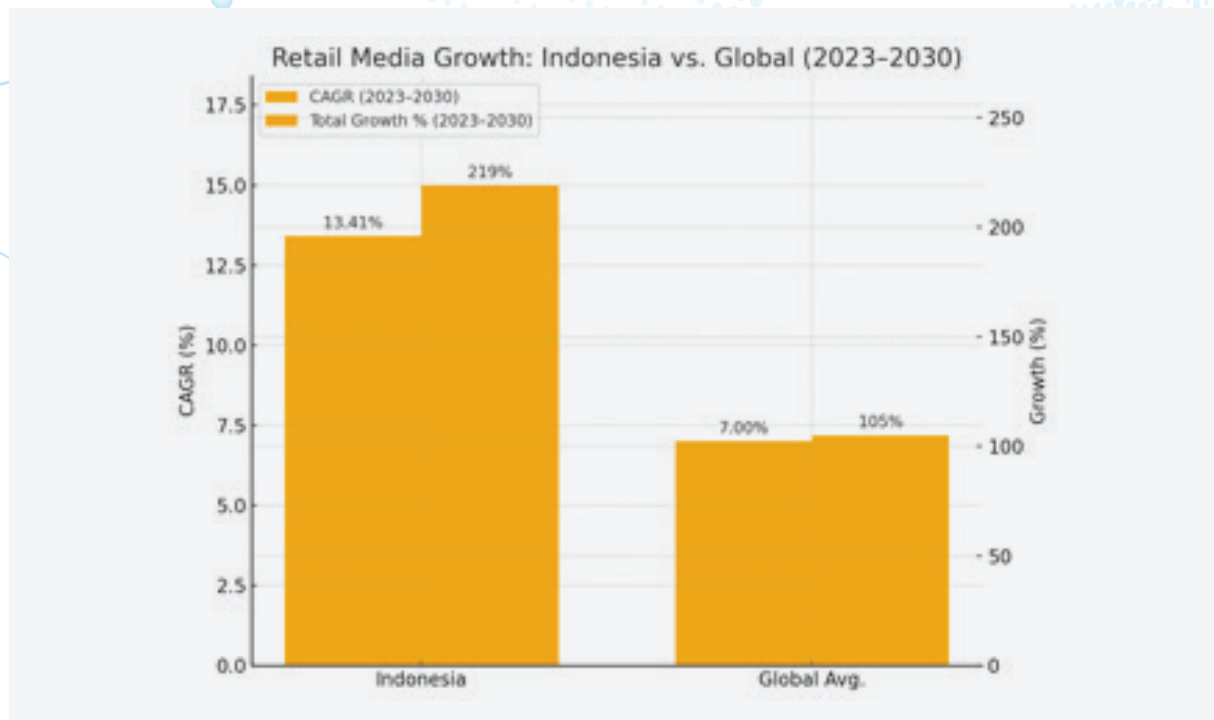


Chart 1: Retail Media Growth in Indonesia vs. Global CAGR. Retail media ad spend in Indonesia is growing nearly twice as fast as the global average, driven by superapps, mobile-first commerce, and SME adoption, GrabAds & Kantar (2024)³ & WARC/GroupM Global Retail Media Forecast (2024)⁴

Sectors Leading the Way: Who's Winning in Retail Media

- **Beauty & Fashion** brands dominate with creator collaborations, TikTok lives and short-form. Platforms like TikTok Shop have made live selling a cultural phenomenon in Indonesia, blending entertainment, real-time offers, and influencer trust to drive impulse buys and a/cle discovery. In categories like skincare and modest wear, TikTok live new rivals flash sales as a top performing format.⁵ According to Kantar, livestreaming ads deliver measurable business impact. For medium and smaller brands, formats like TikTok Live can generate up to 30% uplift in immediate interest, while also contributing to long-term brand affinity, making it a strategic tool beyond impulse sales.
- **FMCG & Food Delivery** advertisers use RMNs to target repeat buyers with programmatic ads, checkout offers, and app integrations.⁶
- **SMEs & Home Sellers** scale efficiently with tools like **Tokopedia's TopAds**, which allow performance-led campaigns with minimal spend.⁷

Non-endemic brands, including banks and telcos, are now investing in RMNs for app installs and service awareness, proving this isn't just a channel for D2C or fast-moving goods.⁸

2025 Trends Every CMO Should Act On

1. Media Is Full-Funnel but Requires Rewiring

More than 70% of brands globally still measure RMNs on conversions, yet top-performing advertisers now use multi-metric frameworks to track reach, brand lift, new user growth, and repeat sales.⁹

Many marketers here still think retail media is just for last-mile conversion, but the most progressive brands in Indonesia are using it to drive awareness, trial, and loyalty.

A McKinsey study supports this shift: nearly one-third of RMN budgets are now allocated to brand-building.¹⁰

2. Platform Fragmentation = Test-and-Learn Imperative

Indonesia's RMN ecosystem is diverse. Each platform, from Shopee to Tokopedia, offers different targeting, ad units, and reporting depth.

Recommendation: Allocate cross-platform test budgets quarterly to benchmark effectiveness and standardize KPIs across ecosystems.

No two platforms are the same. Indonesian marketers need to treat commerce media like a portfolio, test, learn, and optimize across each ecosystem.

3. Content Must Be Commerce-Ready, Not Recycled

Underperforming RMN campaigns often rely on reused social or display assets. But platforms reward **SKU-specific, dynamic content** optimized for price, inventory, and format.

Recommendation: Use Dynamic Creative Optimization (DCO) and platform-native creative to improve engagement and CTRs.

Local creative nuance matters. The brands we see winning in Indonesia are designing assets specifically for retail placements, not just recycling from social or display.

4. Superapps Are the Next Frontier for RMNs

Grab's ad ecosystem delivers contextual ads across transport, food, and wallets, targeting the whole consumer journey. These placements are **up to 7x more effective** than traditional digital display.¹¹

Beyond commerce, OOH+RMN integrations, like Alfamart's digital screens, show how omnichannel intent can drive results through data-backed placements.¹²

Tactical Framework for CMOs

CHALLENGE	STRATEGIC MOVE
ROAS-only focus	Use full-funnel scorecards: brand lift, LTV, share of search
Fragmented platform tools	Build unified attribution + test-and-learn plans for each ecosystem
Creative fatigue	Deploy DCO and modular creative templates by SKU/category
Underutilized SMEs	Train sellers to use tools like Tokopedia's TopAds effectively

RMNs Are a Business Transformation Channel

Retail Media in Indonesia is a strategic transformation. For brands to win, CMOs must:

- Reorganize teams around blended brand-performance goals
- Treat retail media as a growth driver, not just an optimization layer
- Push platforms for better data access, clean room partnerships, and outcome-linked attribution

With measurable ROAS, closed-loop visibility, and massive reach, RMNs, and formats like TikTok live, offer the clarity and agility modern marketers need if they're ready to rethink the playbook.

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²GroupM. (2024). Indonesia's digital ad market outlook. Campaign Asia.

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⁴Ibid.

⁵Mintel. (2024). Beauty Trends Indonesia.

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⁸Heaptalk. (2024). Non-endemic brand adoption in RMNs.

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How Universalist Faith is Redefining Brand Relationships in Indonesia

In recent years, Indonesia has seen a major cultural shift, particularly among Generation Z and Y as the country's largest demographic composition, making up around 28% of the total population.¹ This generation is digital-first, with 87% having access to the internet, spending more than six hours per day online, mostly on social media.² However, they are more than just tech-savvy, these generations are also spiritually aware, though in a way that always unfit conventional definitions. Many young Indonesians now identify as what scholars call "Universalist Muslims" which is defined by a group of people who embrace Islamic values, on the other hand prefer expressing their faith in ways that are modern, open, and socially inclusive.

Gen Z and Y Muslims respond more positively to brands that reflect values like honesty, convenience, inclusivity, and emotional relevance. Rather than being told what to believe, universalist Muslims want brands that understand who they are and what they stand for, including those who balance faith and modern life. This cultural trend is changing how companies, including those in finance, tech, and lifestyle, build relationships with their audiences.

For marketers, this opens a unique opportunity. Today's universalist Muslims do not just want products, they want meaning. They are less interested in top-down, one-size-fits-all branding and more drawn to brands that engage in real dialogue. Emotional storytelling, personalization, and value-driven experiences are now the strongest drivers of brand loyalty, particularly in traditionally conservative categories like Islamic banking or syariah financial service institutions.



BYOND The Label: How BYOND by BSI Win the Universalist Muslims.

This is where BYOND, a super mobile banking app by Bank Syariah Indonesia (BSI), comes in and challenges the norms. Through its #SemuaJadiMudah campaign (Everything Becomes Easy), BYOND managed to shift perceptions of Islamic finance from old-fashioned and exclusive to modern and accessible. Rather than focusing on religious messaging, the campaign emphasized human values, like ease of use, emotional relevance, and digital simplicity, that speak directly to universalist Muslims, laying the foundation for a product experience built on purpose, relevance, and integration, as this happened to be one of the emerging tension within modern Muslims where disintegration to access financial, social, and spiritual become the challenge to answer the holistic needs of being modern Muslim. These challenges underscored by the divided values and ecosystem (digitally) that become burden within these three aspects, where only 16.5% of modern Muslims allocate their income for savings, 14.2% only use the religious mobile app, and only 1.67% doing zakat, wakaf, and fitrah. Departing from exactly where the problem sits, BYOND stands on those three key pillars harmonizing the multifaceted demands of modern life; Financially empowering through comprehensive transaction feature, Socially connecting by providing numbers of social contribution features such as charity, and Spiritually by providing digital access to Juz Amma and even prayers notification to support the everyday journey of today's Muslims—all in one Super App. Given this action, BYOND captured a dominant 60.1% share of voice (SOV), outpacing competitors in the digital banking conversation.

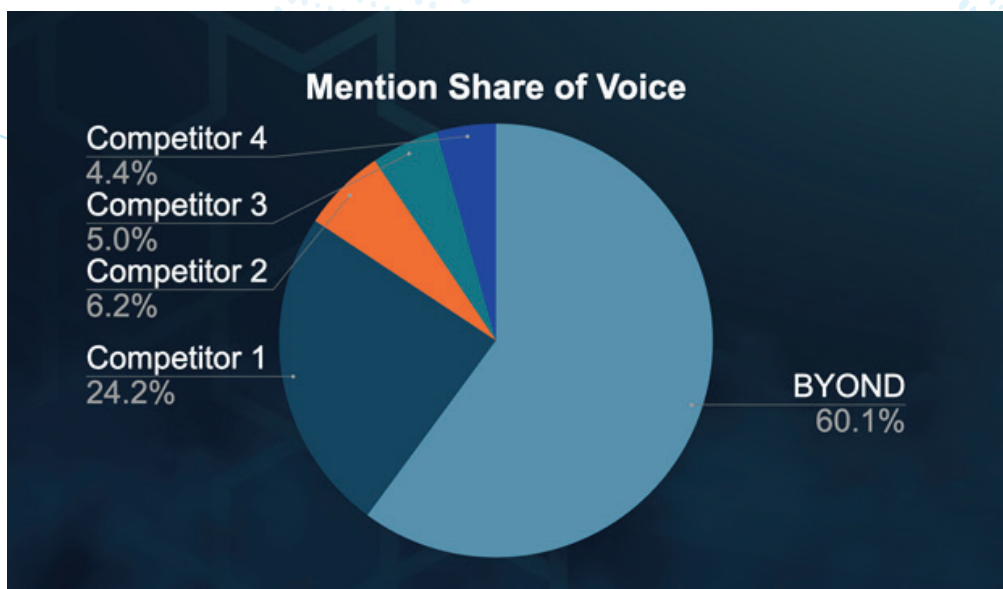


Image 1: How share of voice BYOND by BSI dominated the digital banking conversation. Social Listening Meltwater, 2024.

Between November 2024 and January 2025, BYOND saw 3.9 million app installs, with 76.6 million total reach, and 36.3 million video views. On X, the hashtag #BYONDByBSI trended for more than 11 hours. What is more impressive is these numbers were not driven by product features alone, they came from their way BYOND connected emotionally with users. The campaign collaborated with Atta Halilintar and Aurel Hermansyah (a celebrity couple) has built a full ecosystem of content and experiences that felt authentic to universalist Muslims. The campaign delivered tangible result in user registration growth that increased by 28.29%, and active user growth also increased by 19.73%.



Source: Volare & BSI Internal Data

BYOND's success proves that a brand should not have to choose between Islamic and being modern. By focusing on the universal values that resonate with young Muslim universalists, such as trust, simplicity, and emotional connection, BSI turned a financial product into a lifestyle brand. It showed that Sharia banking does not need to be exclusive or overly traditional to be relevant, it just needs to speak the same language as its audience.

In conclusion, the rise of Universalist Muslims among Indonesians transforms not only cultural norms but also how brands must behave. Campaigns like #SemuaJadiMudah illustrate that faith, when expressed through inclusive design and human storytelling, can strengthen a brand's emotional equity without alienating anyone. For any brand hoping to connect with universalist Muslims, the lesson is crystal clear: meet them where they are and be open-minded without neglecting the values-first.

¹Badan Pusat Statistik (BPS) <https://www.bps.go.id/publication.html>

²Statista. (2024) <https://www.statista.com/topics/12373/generation-z-in-indonesia>



ALIF DIMAZ
PRALENGGA

Strategic Planner

VOLARE



MUHAMAD RAFLY
AR RAZI HAS

Strategic Planner

VOLARE



From Diapers to Dialogue: How Sweety Became a Trusted Parenting Partner

I. Building Trust in the Chaos of Early Parenthood

What if your brand wasn't just seen, but trusted—like a best friend whispering advice at 3AM?

In the noisy digital world, most brands fade into the scroll. For Indonesian parents—especially first-time mothers—the need for authentic connection transcends traditional metrics. They face dual challenges: heightened privacy concerns when sharing data online and skepticism about marketplace purchases.

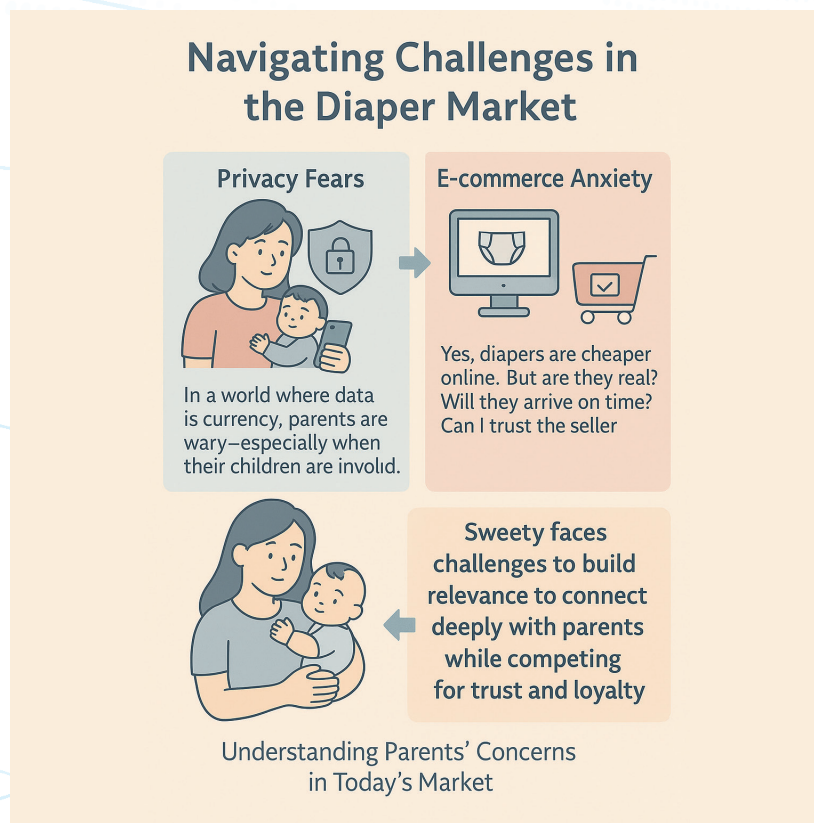


Image I: Navigating Challenges in the Diaper Market, Secondary research from Ogilvy One Indonesia

For Sweety, this created an opportunity to leverage AI-led personalization while maintaining brand safety. Rather than pushing promotions, the brand integrated MarTech solutions that respected parental boundaries while delivering timely support. The challenge wasn't just proving product quality but establishing genuine connections with increasingly selective parents through transparent data practices and personalized touchpoints.

II. From Market Research to Relationship Architecture

Instead of pushing harder with ads, Sweety listened deeper to what parents truly needed. They weren't just seeking better diapers—they were searching for answers, empathy, and someone who could anticipate their needs before they even articulated them.

This understanding catalyzed Sweety's transformation from traditional marketing to relationship-building. The brand designed a framework delivering content, support, and offers that matched each mom's baby's age, lifestyle, and emotional state—all while respecting her privacy. Here's how it came to life:

Step 1: Listening Better with Data (But Keeping It Human)

Most CRM strategies drown in numbers, but Sweety used data to spot the story behind every signup—identifying first-time moms, tracking baby ages, and noting whether she opens WhatsApp at 8PM or checks emails during her morning coffee. With over **2 million moms** in the database and **80% addressability**, Sweety tailored each touchpoint using AI-powered personalization using the Salesforce Marketing Cloud Platform.

Step 2: Building a Journey, Not Just a Funnel

Sweety mapped out Age-Stage Journeys to better support parents. These journeys focused on Power Moments, celebrating milestones like a baby's first steps with helpful tips and the best diaper options.

Other content types included:

Filler Content: Reassurance during challenging times.

Reminders: Timely promotions such as upsize notifications and vouchers.

Behind every message was a commitment to empathy and relevance, ensuring parents felt understood and supported throughout their journey.

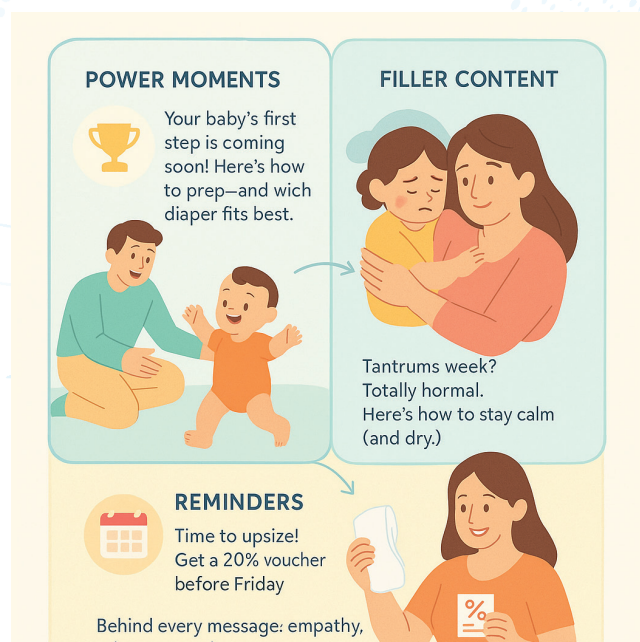


Image II: Title, Secondary data from Ogilvy Indonesia

Step 3: Immediacy in Communication

Sweety optimized WhatsApp messaging with personalized previews and emotional storytelling, establishing it as their critical channel that significantly outperformed email engagement metrics.

- WhatsApp Welcome messages achieved 43% click-to-open rates (CTOR), compared to email's 13%.
- Hourly triggers for WhatsApp Welcome messages boosted open rates to 82%, demonstrating the importance of prompt communication.

Step 3: Trust by Design

From Day 1, Sweety put **privacy at the core**. No aggressive data grabs. No creepy retargeting. Just honest value exchanges. Example: A WhatsApp quiz asking moms to “Guess Sweety’s 3 best features” offered a playful incentive while gently collecting profile data.

The Impact: Conversations That Convert

Through this process of relationship design Sweety Diaper was able to increase opt-ins, deeper insights, zero distrust.

These weren't vanity metrics. They were signals of something deeper: **trust forming**.

- **+30% engagement** in influencer-led social content
- **+20% conversion** from targeted vouchers
- WhatsApp messages achieved **43% click-to-open rate**
- Size Transition Campaigns reached **69% read rate**, outperforming 2024 averages
- Community-building campaign added **15,000 followers in 3 months**

Key Learnings for Stakeholders

Sweety's success offers clear lessons:

- **Agencies** should apply empathy-led strategies focused on emotional relevance and timing.
- **Tech Providers** must enable real-time, omnichannel personalization—e.g., chatbots that streamline offline data.
- **Collaboration** is essential to scale personalized engagement while upholding trust and privacy-first standards.

The Takeaway: Loyalty Is Built One Moment at a Time

Sweety's success wasn't about technology—it was about timing and empathy. By understanding when parents needed support, the brand delivered the right message at the right moment, building trust one interaction at a time.

Rather than speaking louder, Sweety chose to listen—offering comfort like a friend would. In a noisy world, this made all the difference.

True loyalty stems from relevance, empathy, and trust. While data and automation help navigate Indonesia's dynamic landscape, authentic connection remains the foundation of long-term success.



BAMBANG (REZA)

ADITIAWARMAN

Head of Digital Marketing

 **Kimberly-Clark** Softex



Top Indonesia Ad Trends for Maximum Impact in 2025

As attention spans continue to shrink, brands are being pushed to rethink what actually drives results. Increasingly, the answer points to creative, not just as a support function, but also as a central driver of performance.

I. Breaking Through the Noise: The Fight for Attention

Ad saturation and declining attention: Attention spans have been shrinking while the number of ads people are exposed to has been increasing. Despite being technically viewable, a significant 70% of advertisements are entirely ignored by audiences.¹ It's becoming harder to break through the noise with traditional formats.

Changing targeting approaches: Over-personalization is losing its impact, requiring a shift towards more contextually relevant and creatively engaging content to connect with the audience effectively. Contextual ad spending is set to grow steadily—by almost 14% every year until 2030.²

Creative underestimation: Short-form content requires instant engagement. The human brain takes less than half a second to trigger a reaction to mobile ads.³ Yet brands often undervalue creative potential and struggle to prioritize creative investment.

The main forces transforming Indonesia's advertising landscape

There's a growing focus on creative quality, smarter formats, and attention as a performance metric. Here are some of the key trends shaping that shift.

II. Creative and Moment-Based Marketing as a Differentiator

With growing competition for attention, creative is becoming a key performance lever. Data from NCSolutions, states that creative is responsible for 49% of incremental sales in a campaign.⁴ Additionally, a System1 study found that advertisers have to spend an extra \$109b on dull ads just to match forecasted company growth.⁵

New and innovative formats, if done right (think: creative visuals, clever messaging, or an unexpected twist), lead the way and generate more traction. High-impact ads, 3D ads, and gamified experiences are delivering stronger engagement across regions. Campaigns using these formats have shown higher interaction rates compared to standard display ads.⁶

Impactful creative isn't a nice-to-have—it's an essential. But when you take a good creative and put it in the right context, like placing a smartphone ad within an article comparing phone models, it taps into users' existing interest and decision-making mindset. That's when contextual advertising is seeing renewed momentum for its ability to drive relevance, particularly in environments where behavioral targeting is less effective.

Finally, dynamic content and moment-based marketing adjust content based on variables like weather, time of day, or live events. Picture a beverage brand showing ads for refreshing iced tea on hot afternoons and cozy hot chocolate when it's chilly. These context-aware ads create timely and engaging experiences without over-personalization.

III. AI's Expanding Role in Creative and Strategy

AI is already helping us refine and improve campaigns. It's great for testing ideas, predicting user responses, and optimizing content and placements.

Fueled by data, AI can generate insightful attention heatmaps, revealing areas of likely user focus. This capability allows more informed creative decisions, enabling designers to craft more engaging visuals and strategically place key messages for greater impact.



Image I: AI-generated attention heatmap, Eskimi Internal Data

Measuring Real Attention

Advertisers are increasingly focusing on attention metrics—tools that evaluate how users engage with creatives in a real-world scenario before a campaign even launches. This allows marketers to refine and optimize creatives before investing media spend, ensuring the content is set up for success.

During live campaigns, measurement has also shifted—from tracking what the tech does (e.g., ad loads or impressions) to understanding what users actually see and respond to. It's a move to optimise your campaigns for attention, not impressions.

BEFORE VS. AFTER OPTIMISATION

The attention shift

Metrics	Definition	Before optimisation	After optimisation
Attention Per Mile (APM)	The total attention in seconds that a group of impressions received per 1000 impressions.	53% below the benchmark	69% above the benchmark
View time (in seconds)	The average amount of time an ad was viewed per measured impression.	27% below the benchmark	14% above the benchmark
View rate	The number of impressions where an ad was seen compared to the number of times it was shown.	41% below the benchmark	45% above the benchmark

Image II: Attention data from March 2025, compared to Lumen benchmarks, Eskimi Internal Data

Connected TV & Digital Out-of-Home (DOOH)

CTV and DOOH continue to gain traction as high-impact channels. They combine the reach and storytelling power of traditional media with the flexibility and interactivity of digital. In Indonesia, both Digital Out-of-Home (DOOH) and Connected TV (CTV) are experiencing notable growth, with projected CAGRs of 6.5% until 2033⁷ and 8.84% until 2029,⁸ respectively. This signifies new creative opportunities in public and semi-public spaces.

Local Insight: Mobile-First Behaviors in Indonesia

Eskimi's data shows mobile apps in Indonesia drive 245% more engagement than websites.⁸ Top app categories include reading, tech tools, and live sports, while websites lead in news and entertainment. Tech and food & beverage brands dominate ad spend on the top-performing sites, reinforcing the need for mobile-first strategies.

Unlike global trends, where websites perform just 1.08x better, Indonesia's sharp contrast highlights the power of localization in ad strategy. The study analyzed 14,000 global campaigns (June–December 2024) with over 500,000 impressions.⁹



Image III: Eskimi study of top apps and websites in Indonesia, Eskimi Internal Data

IV. Conclusion

2025 is not about doing more—it's about doing it smarter. As traditional strategies are no longer enough to cut through the noise, brands that view creative as a performance tool, rather than just media filler, will lead the way.

With dynamic formats, attention metrics, and AI optimization, the marketing landscape is evolving quickly. But the core idea remains the same: effective advertising starts with engaging, meaningful experiences.

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