

MODERN MARKETING RECKONER 2025 - 2026

FOREWORD

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Indonesia's marketing industry is entering a defining chapter. We are seeing the convergence of technology, data, creativity, and business intent in ways that are setting the stage for long-term transformation. For marketing leaders, this is a time to act decisively with clarity, confidence, and accountability.

Our economic outlook reflects this urgency. 17th largest economy globally by nominal GDP and 7th by purchasing power parity. These numbers signal opportunity, but they also demand that our approach to marketing evolve in both scope and sophistication.

Agentic AI is leading the next wave of this evolution. Rather than replicating past inputs, agentic AI enables systems to make decisions based on goals, context, and dynamic feedback. The Asia-Pacific market for these tools is growing at a CAGR of 41.7%¹, and Indonesia's investment in AI-optimized data centers, expected to reach \$1.44 billion² in 2030, is laying the necessary infrastructure. For marketing teams, this means smarter decision-making, faster personalization, and more scalable content production.

Indonesian consumers are evolving rapidly. As of January 2025, 212 million Indonesians are online, with 87%³ of internet traffic coming from mobile devices. Shopping, search, entertainment, and social interactions now unfold in short bursts across multiple screens, pushing marketing to be insight-led, emotionally attuned, and operationally agile. As a consequence, social platforms have become central to engagement, with 143 million⁴ active users and creators playing a pivotal role in product discovery. Nano-influencers, who form the majority of Indonesia's 1.1 million digital creators, are driving trust and conversions, making social commerce a strategic channel rooted in community, not just media spend.

Big data and cloud adoption continue to accelerate, with Indonesia's analytics software market projected to reach \$43 million⁵ in 2025, and broader analytics services expected to exceed \$47 billion. Yet, tools alone aren't enough, as data only drives value when teams are equipped to interpret it, act on it, and build smarter brand systems. At the same time, a powerful shift is unfolding in how value is defined. Intellectual property, ranging from content and creative assets to proprietary data, is emerging as a growth lever, reflected in over 152,000 IP filings⁶ in just the first half of 2025. Indonesian businesses are increasingly viewing brand output as revenue-generating capital.

This edition of the Modern Marketing Reckoner captures these shifts with precision and relevance. It reflects where we are and what we must prioritize to grow.

I hope this report serves as a guide for action and a reference for transformation as we collectively reimagine the future of marketing and advertising in Indonesia.

¹<https://dimensionmarketresearch.com/report/agentic-ai-market/>

²<https://www.mordorintelligence.com/industry-reports/indonesia-artificial-intelligence-ai-data-center-market>

³<https://marketresearchindonesia.com/insights/articles/fast-growth-indonesia-digital-consumer-behavior>

⁴<https://www.insg.co/influencer-marketing-indonesia/>

⁵<https://www.archivemarketresearch.com/reports/indonesia-big-data-analytics-software-market-873485>

⁶<https://www.legaleraonline.com/ip-news/indonesia-boosts-ip-protection-a-leap-towards-innovation-driven-economy-961197>

FOREWORD

SHANTI TOLANI

Country Head & Board of Director Indonesia



Indonesia's marketing landscape is undergoing a pivotal transformation, shaped by innovation, consumer shifts, and global ambition. Through 2026, the marketing and advertising ecosystem must evolve in parallel. Growth today demands purposeful leadership, technological fluency, creative courage, and a deep commitment to long-term value.

The Modern Marketing Reckoner 2025 is our annual effort to capture the forces reshaping our industry. It is both a mirror to what is and a compass for what's next. Grounded in data, insights, case studies powered by growth perspective, and designed to support Indonesia's marketing and advertising industry leaders, The Modern Marketing Reckoner 2025 is a critical element in navigating this complex moment with clarity.

Artificial intelligence is rapidly redefining what's possible. The generative AI market in Indonesia, valued at \$175 million¹ in 2024, and it is forecasted to grow more than fivefold by 2033. Its integration into marketing—across targeting, personalization, content generation, and media optimization—represents a leap forward in efficiency, creativity and precision. AI adoption is expected to rise by 30%² in just the next year. The question is no longer if we adopt impending changes, but how well can we adapt.

The Modern Marketing Reckoner 2025 highlights two major shifts redefining marketing in Indonesia: the reassertion of brand purpose and the rise of retail media networks. Today's most resonant brands lead conversations, reflect diversity, and embed ESG and DEI (Diversity, Equity, and Inclusion) into long-term value creation. At the same time, Indonesia is leading Southeast Asia in retail media network (RMN) ad spend growth, projected to rise by 219%³ between 2023 and 2030. With higher effectiveness and direct commerce integration, RMNs are fast becoming strategic priorities for marketers.

And finally, we must not lose sight of our most vital asset—our people. Building workforce capacity through continuous skill development and nurturing a growth mindset is foundational to sustainable transformation. We must equip our talent with both the tools and the vision to lead.

As MMA Global Indonesia, our commitment is to provide frameworks, partnerships, and insights that equip marketers to lead with agility, integrity, and ambition. The Modern Marketing Reckoner 2025 is a manifestation of that commitment.

I invite you to engage deeply with this edition, and to question, reflect, and most importantly, act. The future of marketing is already being built as we speak, and Indonesia has the potential to lead.

¹<https://www.imarcgroup.com/indonesia-generative-ai-market>

²<https://www.trade.gov/market-intelligence/indonesia-digital-transformation>

³<https://heaptalk.com/insight/grabads-and-kantar-reveal-that-retail-media-networks-are-increasingly-in-demand-in-indonesia/>

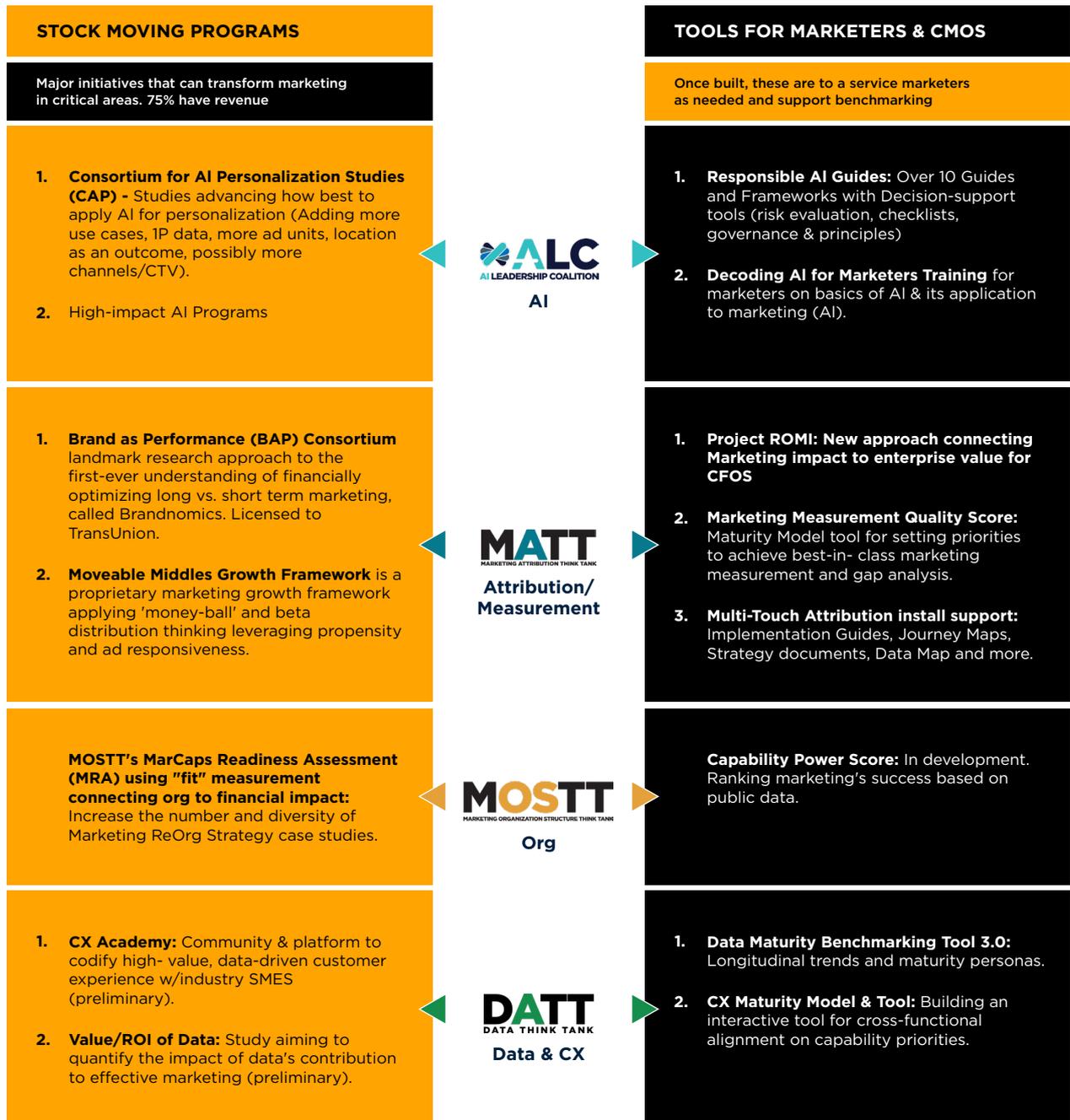
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ABBREVIATIONS

AI - <i>Artificial Intelligence</i>	KPI - <i>Key Performance Indicator</i>
APAC - <i>Asia Pacific</i>	IoT - <i>Internet of Things</i>
ATT - <i>App Tracking Transparency</i>	MMM - <i>Marketing Mix Modeling</i>
B2B - <i>Business-to-Business</i>	MQL - <i>Marketing Qualified Lead</i>
BPS - <i>Badan Pusat Statistik</i>	MUA - <i>Makeup Artist</i>
BVOD - <i>Broadcaster Video on Demand</i>	NLP - <i>Natural Language Processing</i>
CAGR - <i>Compound Annual Growth Rate</i>	OAAA - <i>Out of Home Advertising Association of America</i>
CCF - <i>Complexion & Color Finder</i>	OTT - <i>Over-the-Top</i>
CMO - <i>Chief Marketing Officer</i>	POSM - <i>Point of Sale Materials</i>
CPA - <i>Cost Per Acquisition</i>	PR - <i>Public Relations</i>
CSR - <i>Corporate Social Responsibility</i>	Q&A - <i>Question & Answer</i>
CTV - <i>Connected TV</i>	ROAS - <i>Return on Ad Spend</i>
CV - <i>Curriculum Vitae</i>	ROI - <i>Return on Investment</i>
DCO - <i>Dynamic Creative Optimization</i>	SEC - <i>Socio-Economic Class</i>
DEI - <i>Diversity, Equity, and Inclusion</i>	SEM - <i>Search Engine Marketing</i>
DOOH - <i>Digital Out-of-Home</i>	THR - <i>Tunjangan Hari Raya</i>
DSP - <i>Demand-Side Platform</i>	TOP - <i>Top Of Mind</i>
FHW - <i>Feminine Hygiene Wash</i>	TV - <i>Television</i>
FMCG - <i>Fast-Moving Consumer Goods</i>	UGC - <i>User-Generated Content</i>
FOMO - <i>Fear Of Missing Out</i>	WHO - <i>World Health Organization</i>
FYP - <i>For You Page</i>	XR - <i>Extended Reality</i>
GDPR - <i>General Data Protection Regulation</i>	YoY - <i>Year-on-Year</i>
KOL - <i>Key Opinion Leader</i>	

MARKETING + MEDIA ALLIANCE THOUGHT LEADERSHIP PROGRAMS



Navigating Walled Gardens With Evolved Social Media Measurement in the Age of AI

The advertising industry is experiencing a significant transformation as AI technologies mature and evolve. Despite only 70% of internal global marketing companies¹ implementing AI, machine learning revolutionizes digital advertising by automating campaign optimization and budget allocation, cutting costs by 35% on average and replacing 10+ hours of weekly manual workload.² Meanwhile, AI systems grow more adept at detecting unsuitable content, but new challenges emerge from generative AI (harmful content and deepfakes). This reflects the pivot from television commercials to measurable social campaigns, in which the role of AI is apparent.

Social Advertisement: Ensuring Integrity of Data with AI

With 5.24 billion³ global social media users and Indonesia leading APAC engagement through 103 million Instagram users⁴ consuming four hours of daily content, platforms have become critical advertising channels despite growing measurement challenges. As data collection limitations reduce remarketing effectiveness and increase conversion costs, 73% of companies expect reduced campaign attribution capabilities⁵ while nearly half of US marketers⁶ are turning to cross-platform measurement providers to navigate walled garden analytics, making markets like Indonesia—where 53% of consumers avoid brands appearing alongside inappropriate and negative content—essential testing grounds for AI-powered solutions that can restore advertising precision and accountability.

2025 Global Insights: APAC

Percent of Consumers That Would Stop Using a Brand Seen Next to False, Objectionable or Inflammatory Content

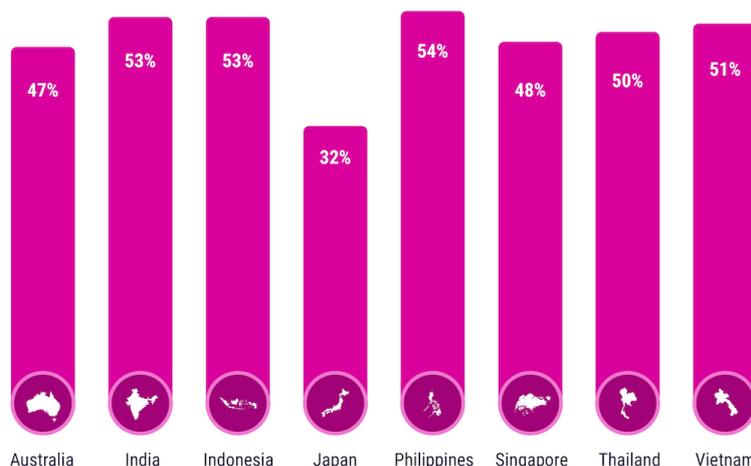


Figure 1. Misplaced Ads in Inappropriate Content Drive APAC Consumers Away

While walled gardens create measurement challenges that complicate cross-platform analysis, marketers are turning to AI-powered measurement. **Contextual systems** use natural language processing to match ads with content, while **AI-predictive** use machine learning to optimize placements automatically. Both deliver enhanced performance, privacy-first by using adaptive campaign algorithm.

AI-Powered Shared Data Platform as an Alternative to Walled Gardens

The reality is that brands lack the budget and AI expertise to scale. So, the integration AI-driven measurement and verification tools restoring the visibility. This aligned with principles to marketing win in walled gardens: use outcome-tied transparency, 3rd-party validation, and cross-platform metrics. This is critical, as 46% marketers⁷ struggle reaching audiences on platforms as walled gardens sideline content quality and transparency. Third-party AI solutions restore precision and accountability, boosting measurement clarity and campaign performance.

Key actions to unlock stronger campaign performance:

- **Utilize audience delivery and verification tools** to ensure your advertisements are connecting with the intended viewers, rather than simply accumulating impression counts.
- **Integrate post-bid media quality measurement** to assess whether your placements meet your viewability, brand suitability and attention standards.
- **Implement tools that unite performance and protection capabilities**, blending AI-driven optimization with third-party verification to boost efficiency and return on investment in walled garden settings.

How AI Can Help Achieve Optimum Campaign Results for Brands

With 53% of Indonesians claiming to stop buying from brands advertising near unsuitable content, and 60% of advertisers concerned about programmatic safety and suitability⁸, a single poor placement can erode trust. Use analytical AI tools to assess the context and ensure placements are aligned to brand values, can be scaled with the following capabilities:

- **Visual Analysis** for checking video keyframes to identify objects, scenes, and situations that protect brand value and perception for audience.
- **Text Analysis** to examine captions, on-screen text to understand sentiment, context, and subtle nuances to ensure that every message aligns with the intended audience.

- **Audio Analysis** to evaluate all audio elements, including speech and background sounds, to ensure the tone and content are appropriate.

The choice is clear: brands can either remain vulnerable to fragmented data in walled gardens, or leverage AI-powered solutions. The takeaway here is that AI has multiple critical applications for brands across content analysis, verification, optimization - and that leveraging it is no longer an option to drive results and keep up with their competitors who are using it.

¹IAB. (2025, March 24). State of data 2025: The next evolution of AI for media campaigns.

²DoubleVerify. (2025, August 13). 2025 DV global insights: AI, automation and the future of digital advertising.

³Yew, C. (2025, August 13). Screens, streams, and scrolls: State of Indonesia's media consumption in 2025. YouGov.

⁴Market Research Indonesia Consulting Firm. (2025, May 2). Fast growth in Indonesia digital consumer behavior.

⁵IAB. (2024, March 14). IAB.

⁶Mitchell-Wolf, E. (2024, October 29). Ad measurement trends H2 2024. EMARKETER.

⁷DoubleVerify. "2025 DV Global Insights: AI, Automation and the Future of Digital Advertising." DoubleVerify, August 13, 2025

⁸WARC. (2024). Brand safety/suitability. <https://www.warc.com/content/feed/60-of-advertisers-and-agencies-are-concerned-about-brand-safety-in-programmatic-advertising/en-GB/9798>



THEODORUS CANIGGIA

Sr. Enterprise Sales Director



**Attention as
the New ROI:**
The Future
of Measurement
in Indonesia

In Indonesia's fast-evolving digital economy, traditional metrics like impressions, clicks, and conversions no longer capture the full picture of marketing effectiveness. As streaming, social commerce, and shoppertainment reshape daily behaviors, attention has emerged as the scarce currency of growth. It measures not just whether an ad was seen, but whether it engaged, held, and influenced action. With digital spend already at 75% of ad budgets in Indonesia and expected to grow further, marketers face a clear mandate: prove that attention translates into brand equity, sales lift, and long-term ROI in a fragmented media landscape.

Streaming: From Entertainment to Commerce

Indonesia is Southeast Asia's largest OTT market, generating US\$552M in streaming revenue in 2024, with 95% of Indonesians under 55 streaming monthly.¹ This is no longer passive entertainment: Gen Z viewers are 42% more likely than average to search or shop for products encountered while streaming, making OTT a gateway to commerce.² The impact is clear in campaigns like L'Oréal Indonesia's Maybelline on YouTube, which utilized intent-based targeting to drive higher view-through rates, stronger brand consideration and favorability, ultimately leading to sales uplift and market share growth. In Indonesia, streaming attention is proving to be more than awareness; it is a measurable commercial impact.

Social Commerce and Livestreaming: Shoppertainment at Scale

Social commerce is now central to Indonesia's digital life, with 6 in 10 Indonesians purchasing via livestreams and 83% joining a live shopping event.³ The sector is projected to reach US\$5.25 billion in 2025 and grow to US\$22 billion by 2028, driven by platforms such as TikTok, Shopee Live, LazLive, and Tokopedia Play. TikTok, with 100M Indonesian users spending 45 hours per month, has become both cultural hub and sales engine.⁴ The format's power is evident in Eat Sambel's TikTok campaign, which achieved an 11x ROAS overall, with livestreams delivering conversion rates 3 times higher than traditional e-commerce and a 13.3x ROAS. Shoppertainment in Indonesia shows that attention here not only drives transactions but builds communities and brand equity.

The Measurement Gap: Beyond Siloed KPIs

Despite digital spend accounting for 75% of Indonesia's ad budgets by 2025, most marketers still measure effectiveness in silos—tracking TV reach, YouTube views, TikTok engagement, or Shopee conversions separately.⁵ This fragmented approach inflates ROI, hides inefficiencies, and fails to reflect how consumers actually move seamlessly from a Vidio stream to TikTok to a Shopee checkout. The challenge is widespread: across APAC, only 37% of marketers measure their traditional and digital investments holistically, leaving the majority unable to link attention to business outcomes. As competition intensifies, the cost of these blind spots is rising.⁶

The encouraging news is that the industry is beginning to shift. Nearly half of global buyers plan to adopt attention-based metrics as a standard of effectiveness, moving away from vanity metrics toward measures that better reflect real impact.

From Attribution to Incrementality: A CMO's Roadmap

For CMOs, the shift to attention as the new ROI requires moving beyond attribution models like last-click or platform-reported conversions, which no longer capture real growth drivers. Instead, leading marketers are adopting Marketing Mix Modeling (MMM) and incrementality testing to isolate which channels truly create lift.⁷ Attention-based metrics act as the bridge, showing not just where consumers looked but which interactions boosted brand equity, favorability, and sales. By combining MMM, incrementality, and attention into a unified lens, marketers can finally balance short-term performance with long-term growth.

Towards a More Cohesive Measurement Future

The path forward is clear: attention must become the common currency of effectiveness. Industry buyers are responding, with nearly half of global buyers planning to adopt attention-based metrics as a standard, moving away from vanity KPIs toward measures tied directly to business impact. In Indonesia, emerging tools like M+C Saatchi's OneView are showing how impressions, clicks, and outcomes can be unified into a single narrative of growth. What matters most, however, is the collective shift: tracking whether attention—across streaming, retail media, and social commerce—leads to sales lift, brand favorability, and long-term equity.

Conclusion

Indonesia sits at the heart of the global attention economy. Streaming, shoppertainment, and social commerce are not passing trends; they are daily behaviors shaping how brands connect with people. Attention is now the most valuable commodity, and marketers who learn to measure it consistently and meaningfully will be the ones who thrive.

In Indonesia, attention is no longer just a means to an end. It is the ROI.

At a Glance: Key Stats for Indonesia



US\$552M streaming revenue in 2024 [wearesocial]



95% of under-55s stream OTT monthly [contentgrip]



6 in 10 Indonesians buy via livestream platforms [contentgrip]



83% have joined a live shopping event [contentgrip]



Social commerce projected at **US\$22B** by 2028 [campaignindonesia]



37% of APAC marketers measure investments holistically



75% ad spend in Indonesia will be digital by 2025 [campaignindonesia]

¹We Are Social. (2025, July). Digital 2025 July global statshot report. <https://wearesocial.com/id/blog/2025/07/digital-2025-july-global-statshot-report/>

²ibid.

³ContentGrip. (n.d.). Indonesia ecommerce TikTok live shopping. Retrieved from <https://www.contentgrip.com/indonesia-ecommerce-tiktok-live-shopping/>

⁴ibid.

⁵Campaign Indonesia. (n.d.). GroupM: 75 percent of Indonesia's total ad spend to be dominated by digital in 2025. Retrieved from <https://www.campaignindonesia.id/en/article/groupm-75-persen-total-belanja-iklan-indonesia-dikuasai-digital-di-2025/1899589>

⁶Nielsen. (2025). Indonesia audience data: Fragmentation advantage. <https://www.nielsen.com/insights/2025/indonesia-audience-data-fragmentation-advantage/>

⁷M+C Saatchi Performance internal data



NACHIKET DESAI

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M+C SAATCHI
PERFORMANCE

The Missing Human Algorithm: How Psychology Can Boost Technology in Digital Content

The digital media ecosystem of late has become a battlefield of data, algorithms, and automated processes. In chasing efficiency, we have started prioritizing technology over humanity, leading to a major shift of digital campaigns being optimized for Precise Objectivity in the short term, like clicks, conversions, and cost-per-acquisition, ignoring the insightful, impulsive, and deeply human reality of building emotional connections to create long-term opportunity for brands.

Just to set the context right, the human brain processes roughly 35,000 subconscious decisions every day.¹ It is, metaphorically, a highly complex computer with an algorithm that works on a massively interconnected neural network, driven by a complex interplay of emotions and instincts. When a tech algorithm tries to connect with this "human algorithm" through communication, a disconnect occurs in case the emotional interface is not compatible. The brain tries to conserve energy by paying attention only to what is survival-oriented or deeply relevant, while technology-based algorithms often drive the connection at a superficial level, designed mostly for efficiency aimed at garnering a premeditated action.

The Imbalance: Exploring "Short-Termism" in Content

We know that brand-building pivots on two strategies: *exploitation* (leveraging known customers and channels for efficiency) and *exploration* (seeking new audiences and messages for growth). Current digital approach is heavily skewed towards **exploitation**. Digital agencies continuously optimize their campaigns for creative, by modifying keywords, and do A/B creative testing to extract maximum efficiency which has led to a widespread culture of "short-termism" in content. However, by understanding audience insights and staying true to brand values, we can boost technology's impact to not only deliver KPIs and ROI but also to build the brand's long-term values in the communication.

Based on our experience with multiple brands, we feel **Binet and Field's** study on marketing effectiveness would be valid even today, demonstrating the impact on brand sales when content excessively focuses on short-term creativity to ride trends versus consistently telling a brand story.^{2,3}

The AI Dilemma and a Human Algorithm for the Indonesian Market

While AI offers immense potential for creative efficiency, it also poses a risk of further **Dematerialization** of the world, replacing human nuance with computational logic. When content is produced at scale by algorithms, we face a **Differentiation Crisis** unless warm, storytelling, brand-building insights are used for content creation. Excessive personalization and trend riding, while seemingly a step forward, can lead to commoditization as every brand's message becomes indistinguishable. In Indonesia, a market with high social media penetration and being flooded with content, this tension is particularly evident.

- **The Impact of Social Commerce:** With increasing purchase decisions made based on short-form video content on e-commerce and social commerce platforms, a brand that utilizes this trend but fails to align its viral content with a consistent brand voice risks gaining temporary spikes in sales at the cost of long-term brand equity.
- **The Gen Z Factor:** For this segment that values authenticity and transparency, a campaign driven solely by short-term metrics like cost-per-click optimization will miss the long-term brand-building mark with this group.

Harnessing Psychology to Supercharge Technology

We believe that the way forward is to balance the human touch with the AI algorithm. While all brand communication should be centred around a brand's essence and equities, even for conversion-focused campaigns, there are psychological triggers, which, when synergized with any brand's equities and combined with tech, can deliver great results:

- **First Impression and Halo Effect:** The initial brand touchpoint has a huge impact on brand perception. Tech can be used to make sure that the impression is high quality and not only on current but also to potential prospects.
- **Social Proof Bias:** This is based on the principle 'People like me, buy things like this'. Tech can be used by starting with social listening to identify Influencers, amplify testimonials supported by user-generated content.
- **Loss Aversion/FOMO:** Scarcity bias can be used as a psychological trigger for Gen Z and young millennials using the fear of missing out sentiment, which. We can use tech to promote a message of the limited edition or exclusive deal to get new users or explore reaching potential buyers.
- **Anchoring:** We can use the insight according to which the first price a consumer sees acts as a reference point and use technology to design the website and ads to showcase a premium or anchor option first to make other prices seem more reasonable.
- **IKEA Effect:** Co-creation increases the emotional stake in a brands. This can be leveraged by creating polls and content submissions by the audience.

This approach ensures that every piece of content, from a viral trend-jacking video to a foundational brand campaign, is rooted in a deep understanding of human behaviour. Technology becomes a tool to execute a human-centric strategy, not the strategy itself.

A Case Study in Human-Centric Success

At the **DMP Group**, we begin by understanding the brand's values, the target audience's pain points, and the category insights to create a distinctive brand content strategy with well-defined guardrails. This approach ensures that even when a brand creates short-term viral content, it never loses sight of its long-term values.

A recent use case involves a brand launch in a restricted but extremely competitive category. Qualitative research revealed a key consumer pain point: the inconsistency of taste in current brands, and at a psychological level Gen Z felt a lack of consistency and commitment in their lives—in friendships, relationships, and even at work.

We started with an organic campaign that highlighted the "False promises" Gen Z navigates in life, making it hugely viral. This was then followed by a branded campaign with a promise of "Consistency." We delivered this message to the identified audience cohorts with precision targeting, contrasting the false promises made by others with the consistency delivered by our brand.

The campaign's success was immediate and sustained. Our AI-based data analytics tool which captures comparative brand considerations based on the digital behaviour of the audience showed positive associations with the brand's values and identity as follows. Within six months of launch, the brand garnered a Top of Mind (TOM) salience at number three, achieved a high double-digit market share, and generated billions of IDR in sales, making it one of the top brands in the market.

This case study proves that by balancing the human in with technology, we can continuously create content that goes beyond viral. Overall, we can conclude that *insights deeply rooted in psychology can boost the impact of Data, AI and technology.*

¹Eva M. Krockow Ph.D. & Matt Huston. (2018, September 27). How many decisions do we make each day? Psychology Today. <https://www.psychologytoday.com/us/blog/stretching-theory/201809/how-many-decisions-do-we-make-each-day>

²Edwards, G. (2018). Brand building breakdown: Binet & Field's latest suggests brands need to think again. LinkedIn. Retrieved from <https://www.linkedin.com/pulse/brand-building-breakdown-binet-fields-latest-suggests-giles-edwards/>

³For more on Binet and Field's research on brand building versus short-term activation, see: Association of Canadian Advertisers. (2020, February 25). Don't short-change your brand: The case for a return to brand building. <https://acaweb.ca/en/2020/dont-short-change-your-brand-the-case-for-a-return-to-brand-building/>



ABHAY KAPOOR

Group Managing Director



**AI-First
Marketing in
Indonesia:**
Strategic
Integration for
Sustainable
Growth

The marketing landscape stands at an unprecedented inflection point where artificial intelligence transcends from a supplementary tool to a fundamental business architecture. Today's AI-first marketers are redefining competitive advantage by harmonizing human intuition with machine intelligence at unprecedented speed and scale. This transformation encompasses three critical dimensions: Agentic AI for autonomous execution, Responsible AI for ethical implementation, and Creative AI for innovative engagement strategies.

Indonesian marketing leaders face a complex ecosystem where traditional measurement frameworks are rapidly becoming obsolete. The convergence of privacy regulations, including Apple's App Tracking Transparency and GDPR compliance, has created substantial signal loss, reducing visibility into customer journeys.¹ In Indonesia, this challenge is amplified by mobile-first consumer behavior, 90% of internet users access the web primarily via smartphones², yet only 26% smartphone penetration was recorded as recently as 2018³, signaling both scale and fragmentation.

At the same time, the rapid adoption of AI-driven ad tech in Indonesia has raised risks of fraud; for example, install fraud rates in the finance vertical peaked at over 20% in 2024⁴, driven by bad actors leveraging AI. As more competitors chase the same audiences with increasingly automated tools, marketers are forced to scale insights faster than execution, while managing weekly shifts in consumer platforms and regulations. This dynamic creates decision paralysis despite data abundance, underscoring the urgent need for AI integration strategies that combine compliance, speed, and creativity.

Philip Kotler's definition of marketing as "the art and science of creating and delivering value" takes on new significance in the AI era.⁵ Peter Drucker's assertion that marketing "encompasses the entire business" becomes increasingly literal as AI-enabled marketers bridge product development, analytics, brand management, and user experience seamlessly.⁶ Modern marketing leaders now require cross-disciplinary skills to drive omni-channel strategies, champion human insight alongside machine learning, and lead responsible AI adoption across organizations.

Recent analysis across finance, gaming, e-commerce, and travel shows AI adoption in APAC accelerating faster than projections, with Indonesia benefiting from unique cultural and economic factors. Festive periods such as Tunjangan Hari Raya (13th month salary) drive up to a 25% spike in purchasing power⁷, creating seasonal opportunities where AI-driven optimization has disproportionate impact.

Agentic AI Implementation

Agentic AI refers to autonomous systems capable of independent decision-making and execution. These agents analyze campaign performance continuously, adjusting bidding, creative, and targeting without human intervention. Indonesian adopters report up to 40% faster optimization cycles, reducing inefficiencies in highly competitive mobile-first markets.⁸

Responsible AI Practices

Responsible AI ensures accuracy, privacy, and ethics through governance frameworks. Regular audits and transparent communication keep brands aligned with Indonesia's evolving regulations while sustaining user trust. Data collaboration platforms further reduce fraud exposure, with firms seeing a 35% improvement in accuracy after adoption.⁹

Creative AI Applications

Creative AI augments rather than replaces human creativity. Integration with tools like ChatGPT enables marketers to query business data directly, turning insights into stronger narratives. Campaigns using AI-assisted creative optimization have scaled high-performing elements 60% faster, driving higher engagement during Ramadan campaigns.¹⁰

Indonesian applications benefit most when AI adapts to cultural nuance. Timing campaigns to Ramadan observance, tailoring messages to dialects, and aligning promotions with events like *Tunjangan Hari Raya*¹⁰ amplify engagement. Leaders who embrace AI with cultural sensitivity will outpace regional competitors, building AI-first organizations while preserving human creativity as the foundation of authentic connection.

AI's evolution in marketing requires strategic integration across agentic execution, responsible governance, and creative enhancement dimensions. Indonesian market leaders must embrace cross-functional AI adoption while preserving human creativity and cultural sensitivity. Success depends on viewing AI not as a replacement for human insight but as an amplification tool that enables unprecedented scale and precision.

The future belongs to organizations that master this balance, transforming their teams into AI-first units while maintaining the human elements that drive meaningful customer connections. As AI continues evolving weekly, the competitive advantage lies in strategic integration rather than tool adoption alone.

¹AI Marketing Transformation Study, Marketing Science Institute, 2024

²Southeast Asian Digital Consumer Report, Google & Temasek, 2024

³Statista. (2019). Indonesia smartphone penetration 2017-2018.

⁴AppsFlyer. (2024). Fraud index report.

⁵Kotler, P. (2022). Marketing management (16th ed.).

⁶Drucker, P. (2021). The practice of management (Rev. ed.).

⁷Nielsen. (2024). Indonesian consumer behavior during festive seasons.

⁸Digital Marketing Institute. (2024). APAC AI adoption survey.

⁹Marketing Science Institute. (2024). AI governance best practices.

¹⁰OpenAI Integration Case Study & Nielsen Festive Report. (2024)



RONEN MENSE

President & Managing Director, APAC



AI-Powered Talent Matching: The #NextMillionJobs Movement's Impact on Indonesia's Employment Ecosystem

Introduction

Mass layoffs across industries and fake job listings on social media eroded trust in recruitment, pushing Indonesia's employment market to a critical breaking point. Traditional hiring processes remained fragmented and unstructured, plagued by skills mismatches, geographic barriers, and fraudulent postings that undermined candidate confidence.

This crisis prompted Jobstreet by SEEK to launch the #NextMillionJobs for Indonesia movement since September 2024. Not merely a campaign, this movement's main goal was to transform & restore confidence in Indonesia's employment market. Through AI-powered matching technology alongside verified hiring process, the intent was to reduce fraud and increase access to job opportunities for Indonesians.

The Challenge: Unstructured Hiring in Crisis

Indonesia's employment challenges extended far beyond simple supply-demand imbalances. Employers struggled with manual CV screening processes, unverified candidate profiles, and poorly written job descriptions. Meanwhile, job seekers navigated fraudulent listings, privacy breaches, and opaque application processes. The geographic concentration of opportunities in Java left millions of qualified professionals in secondary cities and outer islands underserved, creating artificial barriers to employment.

The AI-Powered Solution Framework

The framework behind the #NextMillionJobs movement integrated structured hiring, strategic geographic expansion, and advanced AI to address hiring challenges: machine learning profile matching analyzed candidate skills, experience, and aspirations against requirements to reduce bias and significantly improve fit; natural language processing and generative AI elevated job descriptions to make ads clearer, more compelling, and more discoverable; and platform's verification and fraud detection created a trusted environment with real-time scam removal and strong privacy protection to prevent data leaks.

Strategic Implementation and Market Response

The movement's implementation strategy reflected deep understanding of Indonesia's unique challenges. Rather than following traditional Java-centric approaches, the campaign developed an innovative geographic budget allocation model that balanced market concentration with expansion opportunities.

- Geographic Budget Strategy:** The media investment was strategically divided between Java (50% of budget) and non-Java regions, which were segmented into three distinct zones: West, Central, and East Indonesia. Each non-Java region received dedicated 60-day spotlights, with 40% of the non-Java budget concentrated on the focus region during its spotlight period, while 10% maintained baseline presence in other regions.
- Authentic Voice and Cause Leadership:** The movement appointed award-winning actor Reza Rahadian as Cause Ambassador, recognizing his authentic alignment with the campaign’s mission. His credibility and passionate advocacy provided the authentic voice needed to spark national momentum and restore trust in structured hiring processes.
- Integrated Strategy:** The movement complemented digital efforts with targeted Out-of-Home advertising focusing on office commuters in major cities outside Jakarta. Strategic platform sequencing across TikTok, YouTube, Meta, and Google guided users from discovery to action based on age and behavior patterns, while the premium job listing model lowered barriers for employers.

Measurable Impact and Results

The movement’s results exceeded all expectations, delivering measurable improvements across every key metric:

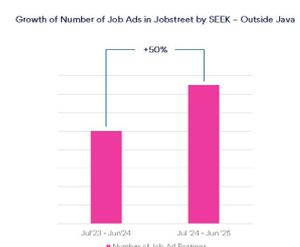


Platform Growth Metrics

- Employer leads increased by 168% and 65% of active employers were new to the platform:** strong employer adoption of the structured hiring platform
- Candidate applications rose by 48%:** restored confidence in legitimate opportunities
- 20% growth in job ads (vs. 5% market growth):** successfully captured and grew market share

Geographic Impact

- 50% of conversions came from outside Java:** democratized employment access
- 50% YoY increase in job ads posted outside Java** (July 2024-June 2025 vs July 2023-June 2024)



Employment Outcomes Most importantly, **placement rates increased from 1 out of 4 to 1 out of 3¹**, meaning that one out of every three job seekers now secured employment through Jobstreet. This is not about performance metric improvement, but a measurable impact on national employment statistics.

The campaign achieved these results while reducing spending by 18%, with monthly reach increasing by 235%, demonstrating how programmatic optimization and intelligent platform design could deliver exponential impact through strategic resource allocation.

The Path Forward: Solving Unemployment Through Structure and Intelligence

The #NextMillionJobs Movement proves that unemployment can be systematically addressed when structured hiring processes meet AI-powered technology on trusted platforms. When job advertisements are structured and verified, platforms protect privacy and prevent fraud, and AI technology ensures optimal matching, both employers and job seekers benefit from more efficient, effective outcomes.

As the movement continues toward its goal of one million jobs and counting, the combination of structured hiring, AI-powered matching, and trusted platform infrastructure positions Indonesia as a regional leader in solving employment challenges through technology innovation.

The next million jobs aren't just a goal, they're an inevitable outcome of systematic, AI-powered employment transformation.

¹Source: SEEK Proprietary Survey



ADHAM SOMANTRIE

Senior Marketing Manager



Scaling Intelligent Advertising in the Age of Multi-Agent AI

Digital advertising has reached a level of complexity that can no longer be handled through manual oversight alone. Marketers in Indonesia now run campaigns across YouTube, TikTok, Meta, connected TV, and programmatic platforms simultaneously. Each channel has its own algorithms, audiences, and creative formats, making coordination increasingly difficult.

On average, Indonesians are exposed to more than 500 digital ads daily, while over 72% engage with three or more platforms in a single day.¹ This means consumer journeys collapse into minutes—watching a tutorial on YouTube, checking reviews on TikTok, and completing a purchase on Meta almost instantly. This fragmented behavior means marketers must deliver consistent messaging while reacting to trends in real time, which is almost impossible through traditional campaign management.

“75% of Indonesia’s ad spend will be digital by 2025.” Source: [GroupM](#)

Why Marketers Are Looking Beyond Automation

For years, automation promised to make digital advertising more efficient. It scheduled posts, tracked metrics, and ran rule-based optimizations. But while automation helped scale campaigns, it could not think. Once ads went live, marketers waited days to spot underperformance and react, by which time the moment had passed.

This shifted the industry’s goal. The new ambition is not just faster execution but smarter decision-making. Marketers in fast-paced markets like Indonesia want systems that can interpret changing cultural contexts, respond instantly to viral trends, and optimize outcomes without manual intervention, especially as 96% of Indonesian consumers say they prefer ads that reflect the content they are viewing.² This is where multi-agent artificial intelligence (AI) is beginning to transform how campaigns are managed.

How Multi-Agent AI Operates

Multi-agent AI is built on specialized components that work like a coordinated team. Each agent handles a specific stage of the campaign journey while sharing data and learnings with others.

Planning agents turn briefs into cross-channel media plans. Context and safety agents scan environments to ensure ads appear only in relevant, suitable content. Optimization agents monitor performance and automatically adjust bids, placements, or targeting based on engagement. Analytics agents evaluate results, turning campaign data into insights that feed future plans.

If the system detects that cooking tutorials are performing well, it shifts more focus there across all platforms. Campaigns self-adjust as new content or influencers drive results, instantly increasing investment toward similar environments.



Image 1: Indonesia Digital Ad Spend Growth 2025-2030, Mordor Intelligence³

The Promise and the Challenges

The potential benefits are significant. Multi-agent AI can reduce manual work, speed up go-to-market timelines, and deliver campaigns that adapt dynamically to consumer behavior. This matters in Indonesia, where digital ad spend is projected to surpass USD 3.2 billion by 2026.⁴

However, adoption also brings challenges. AI systems must remain transparent to avoid black-box decision-making, comply with data privacy laws, and still allow human oversight to guide creative direction. In Indonesia, advertisers must also navigate measurement gaps across walled gardens, ensure brand safety in diverse local content, and address consumer concerns around responsible AI use.

Building organizational trust is equally important. Marketing teams may need new skills and processes to work effectively with AI, requiring reskilling, culture shifts, and regulatory alignment.

Looking Ahead

Multi-agent AI is not a replacement for creativity but a partner that enhances it. It manages execution and analysis at machine speed, freeing marketers to focus on strategy, storytelling, and brand-building.

The next leap is not just efficiency, but helping marketers grow their brand: where human vision shapes the narrative and AI ensures it connects with audiences in the right context.

As campaigns grow more complex, early adopters will shape the next wave of marketing innovation. Those who unite human ingenuity with machine intelligence will win audiences who are constantly moving across platforms.

¹Simon Kemp. 2025. DIGITAL 2025: INDONESIA. Datareportal. <https://datareportal.com/reports/digital-2025-indonesia>

²Teddy Cambosa. 2025. Context matters on ad perception among APAC consumers: report. MARKETECH APAC. <https://marketech-apac.com/context-matters-on-ad-perception-among-apac-consumers-report/>

³Mordor Intelligence. 2025. Indonesia Digital Advertising Market Size & Share Analysis - Growth Trends and Forecast (2025 - 2030). <https://www.mordorintelligence.com/industry-reports/indonesia-digital-advertising-market>

⁴Ibid.



CHAITANYA SINHA

VP Sales, INSEA

silverpush

The Untapped Opportunity of Connected Omnichannel

Marketers in Indonesia increasingly recognize the need to reach customers across multiple channels from BVOD/CTV and display to audio and DOOH.

As audience fragmentation grows, the traditional multichannel approach—buying in silos—has become less efficient and effective compared to a holistic omnichannel strategy.

A connected omnichannel strategy consolidates media buys and puts the audience at the center of a well-coordinated, seamless campaign.

Multichannel vs. Connected Omnichannel: Understanding the Difference



Multichannel

Multichannel marketing uses more than one channel to promote a product or service, but these channels are not seamlessly integrated. This marketing approach is usually planned and executed in a siloed way, across multiple disconnected platforms.



Connected Omnichannel

An audience-first advertising strategy that utilises one platform to unite three or more digital channels (such as mobile, display, native, online video, audio, DOOH, or CTV/OTT) into a connected campaign, and optimises messaging and frequency to a consumer’s media experience.

Unlike multichannel strategies, which operate in silos, connected omnichannel ensures coordination across channels, maximizing efficiency and effectiveness.

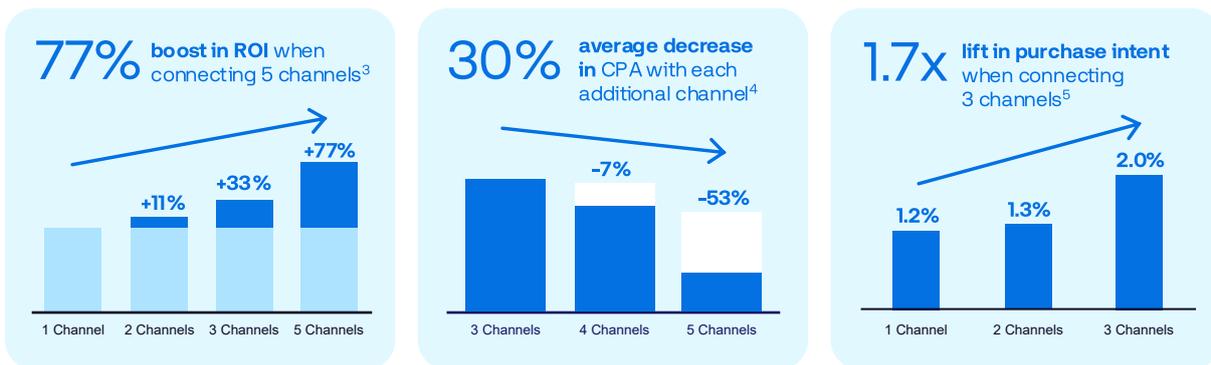
Unlike multichannel strategies, which operate in silos, connected omnichannel ensures coordination across channels, maximizing efficiency and effectiveness.

Why the Omnichannel Opportunity Matters in Indonesia

Connected omnichannel campaigns are more effective at maximizing performance. Advertisers can leverage to:

- Strategically plan campaigns
- Execute with precision
- Measure results holistically

While outcomes vary by campaign, advertisers have reported results such as¹²³



Maximising Channel Strengths

No single channel wins — but together, they do. Connecting channels based on their engagement profile can help enhance their capabilities, increase their performance, and deliver more value.

How to elevate your campaigns

Your 3-step guide to implementing impactful omnichannel campaigns

- 1. Start with a unified view of your audience:** Great advertising starts with truly knowing your audience. With The Trade Desk's identity solutions, including Identity Alliance, you gain a unified view across devices and touchpoints to activate audiences across channels, implement holistic frequency controls, and improve reach efficiency.
- 2. Stay ahead with technology to enhance your strategy:** Take it a step further by optimising your campaign with our technology - combining AI-driven efficiency with control and the power of your own data. Our latest omnichannel optimisation tool is designed to help you automatically adjust bidding across the best-performing channel paths to maximise impact.
- 3. Unify measurement in one platform to maximise ad efficiency and impact:** Ensure your budget is spent where it creates the biggest impact. Track and attribute performance across all channels and devices - revealing what's really driving results and optimising in real time to maximize impact.

¹Analytic Partners, ROI Genome Marketing Intelligence Report, 2023.

²TTD Platform Wide Global analysis of conversion campaigns with Audio, H2 2024, n=316,412.

³DISQO Benchmarks for The Trade Desk Campaigns, Mar 2021 - Dec 2024 | 1 channel n=94, 2 channels n=60, 3 channels n=54.



FITRIYANI AFINI

Business Development Director



Transforming B2B Engagement with “Ted” the First AI-Powered Digital Account Manager

Navigating the Complexity of Enterprise Solutions

With industries undergoing rapid transformation, many enterprises face a fundamental challenge: bridging the gap between increasingly complex B2B solutions and the diverse needs of their clients. Telkomsel Enterprise offers over 70 advanced B2B solutions - from connectivity and IoT to cybersecurity and cloud. Yet, the complexity of these technologies and the broad geographic spread of clients can create significant communication hurdles. With limited account manager resources, consistently engaging and educating customers across such a wide base is challenging, often slowing the sales cycle and limiting business impact. To address these barriers, a smarter, scalable approach to customer engagement is essential.

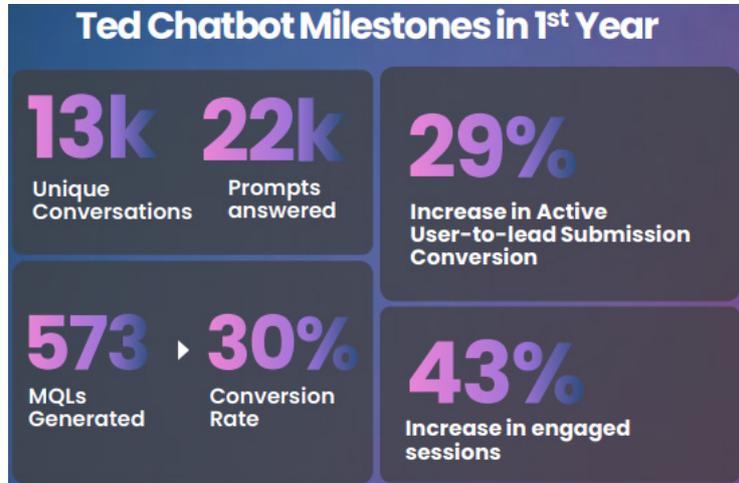
Indonesia's B2B Telco First AI-Powered Digital Account Manager

Amidst the rapid adoption of advanced technologies across the telco industry, Telkomsel continues to stand at the forefront as one of the leading companies driving innovation. In June 2024, Telkomsel Enterprise launched Ted, one of Indonesia's first AI-powered digital account managers for B2B, debuting as a website chatbot. Over time, Ted has evolved into an intelligent platform that personalizes interactions, streamlines lead management, and facilitates collaboration. Acting as a digital assistant to account managers, Ted handles inquiries, guides solution exploration, and creates engaging experiences both online and offline. This sets a new benchmark for customer engagement—delivering faster, smarter, and more tailored experiences to enterprise clients.

Enhancing Engagement and Efficiency with AI Driven Solution

Ted addresses Telkomsel Enterprise's challenges by combining AI with business insight. On the website, it answers inquiries, captures user needs, and business leads before passing the best opportunities to account managers, reducing response time and boosting conversion. For account managers, Ted minimizes repetitive tasks, enabling them to focus on strategic client discussions. At offline events, Ted appears as a metahuman, delivering interactive experiences that elevate engagement and reinforce innovative approach.¹²³

This level of innovation comes at a transformative moment for the telco industry. AI has moved from an experiment to a strategic driver, with adoption rates now exceeding 90% among telecom companies. Over the next five years, AI will enable network intelligence, predictive automation, and hyper-personalized customer experiences, helping telcos differentiate and accelerate revenue growth in a rapidly evolving market.



Insights in Action: Data that Proves the Impact



Telkomsel Enterprise isn't just talking innovation—Ted is delivering results across both digital and offline channels. In the first year, Ted facilitated over 13,000 AI-led conversations and managed more than 22,000 inquiries through the website, generating 573 Marketing Qualified Leads (MQLs) with 30 percent progressing into late-stage deals. Ted identified high-quality business intent in 17.3% of conversations, driving a 29% increase in user-to-lead submissions and a 43% rise in engaged session users.

Beyond digital, Ted's presence as a 3D talking metahuman at major offline events captivated attendees through live, interactive experiences—guiding visitors through solution exploration and strengthening engagement. This approach has successfully handled over 25,000 conversations at flagship events such as Wonderlab 2024, Jalin Nusa 2024, and Telkomsel Enterprise Solution Day 2025. Through responsive, human-like interactions, Ted not only elevates B2B experiences, but also enhances brand perception and creates more meaningful moments for customers and participants.

Conclusion

Industry professionals often face challenges in driving growth and achieving greater business effectiveness. While they understand the issues they encounter, identifying the right strategies and solutions can be difficult. Through Telkomsel Enterprise, Ted serves as a trusted partner—helping professionals discuss, explore, and implement tailored solutions that address their specific needs.

As a result of its impact, Ted received global recognition by winning the AI category at the Asian Technology Excellence Awards 2025. This achievement underscores Telkomsel Enterprise's strong commitment to delivering seamless customer experiences, strengthening customer centricity, optimizing operations, and empowering businesses across Indonesia to fully embrace digital transformation beyond connectivity.

¹Summanetworks. 2025. Telco AI: State of the Market, Q2 2025 — Key Insights for the Telecom Industry. Retrieved from:<https://www.summanetworks.com/blog/telco-ai-state-of-the-market-q2-2025-key-insights-for-the-telecom-industry>

²Ancient Tecnología. 2025. AI in telecom industry in 2025. <https://www.ancient.global/en/blogs-ancient/ai-in-telecom-industry-in-2025>

³Market Growth Report. 2025. AI in Telecommunication Market Size, Share, Growth, and Industry Analysis, By Type (Solutions, Services), By Application (Network Optimization, Network Security, Customer analytics, Others), Regional Insights and Forecast From 2025 To 2033. Retrieved from: <https://www.marketgrowthreports.com/market-reports/ai-in-telecommunication-market-100015>



JOCKIE HERUSEON

Vice President Corporate Strategy,
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Telkomsel
ENTERPRISE

**Brand Purpose
& Campaign
Innovation:**
When Culture
Becomes the
Brief

In today's market, brand purpose has gone beyond CSR taglines and corporate manifestos. The most effective brands are those that integrate purpose into the core value proposition — not as a charity add-on, but as the engine that drives consumer engagement, brand preference, and even category redefinition.

But the purpose without innovation is theatre. To create real change — in business results and cultural behavior — brands must connect purpose to creative and media innovation. This is where the work stops being “advertising” and becomes market-making.

Innovation in this context is not simply about format or channel. It's about re-engineering how a brand shows up in culture: how it challenges norms, reframes conversations, and makes the complex both relevant and actionable.

Case in Point: Sumber Ayu and the Rewriting of a Category

When we first looked at Indonesia's feminine hygiene wash (FHW) category, we weren't facing a conventional brand challenge. We were facing a cultural deadlock.

For decades, this category had been defined by silence. Usage penetration sat still at 3-5%, and the prevailing narrative was marital — “tightening” and “keeping your husband.” This alienated younger, single women and reinforced stigma.

Meanwhile, science was on our side. Sumber Ayu held a genuine clinical differentiator: **pH 3.5**, the level most aligned with vaginal health. Yet this truth was invisible to the very women it could help most.

Here was the perfect storm for brand purpose:

- **A human problem to solve** — ignorance that harms women's health.
- **A truth worth fighting for** — clinical precision in a sea of misinformation.
- **A culture ready for disruption** — shifting from shame to self-care.

The Innovation Model: Shake, Educate, Reform

We designed the campaign as a cultural intervention, not just a media plan:

1. SHAKE - Break the Silence

Provocative digital storytelling — “Drama Water & Soap” — dramatized the hidden dangers of the nation’s most common hygiene ritual. It wasn’t designed to “go viral,” it was designed to start an argument worth having.

2. EDUCATE - Make Science Relatable

We reframed intimate care with edutainment, expert-led conversations, and creator advocacy, making “pH 3.5” a household term. This wasn’t a lecture — it was cultural translation.

3. REFORM - Anchor New Habits

Retail became a stage for education, with high-visibility POSM that turned point-of-sale into point-of-truth. Interactive social formats reinforced the ritual shift.

The Media-Creative Symbiosis

Our creative idea and media strategy were designed to work in lockstep.

- **Digital dominance** — TikTok, Meta, and YouTube became our stage, reaching mobile-first women aged 18-45 (SEC ABC) with tailored creative by life stage and need state.
- **Influencer-led credibility** — Women trusted women, so creators from doctors to lifestyle personalities shared their “aha” moments on abandoning soap-and-water.
- **Edutainment POSM** — High-visibility in-store displays made pH 3.5 impossible to ignore at the point of purchase.
- **Real-time agility** — We used sentiment analysis and engagement data to optimize messaging and formats on the fly, turning conversations into conversions.

The Result: Purpose in Action

The campaign didn't just hit business KPIs. It **shifted the cultural baseline**. Usage penetration rose beyond its historical ceiling. "pH 3.5" entered the public lexicon. Social media — once silent on the topic — became a space where women openly discussed intimate health.

For the brand, this meant reclaimed relevance and renewed market share. For the category, it meant moving from **silence to science**.

The Takeaway for Marketers

This is why brand purpose matters: when it is **true to the product, urgent in the culture**, and **executed with creative-media innovation**, it stops being a message and starts being a movement.

Sumber Ayu didn't just advertise a wash. It reframed what feminine hygiene means in Indonesia — and that is the true measure of Brand Purpose and Campaign Innovation.



RISHI PAHWA

Marketing Director



BELLAMIA AGUSTINA

GM Digital Sea

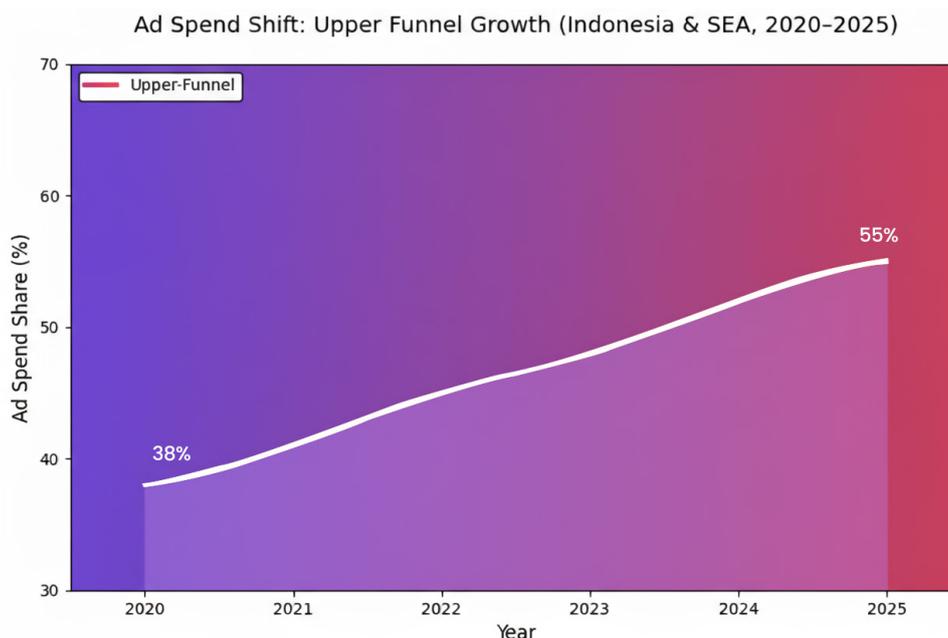


How Automation and Performance- Driven Upper-Funnel Ads Will Redefine Brand Growth

For years, digital advertising has been dominated by lower-funnel performance with clicks, conversions, and cost-efficiency metrics as the guiding stars for advertisers under pressure to deliver measurable returns. However, as consumer behavior evolves and technology advances, the industry is shifting and upper-funnel advertising is no longer just about awareness; it is becoming performance-driven, with automation at the heart of this transformation.

The Changing Role of the Upper Funnel

Traditionally, upper-funnel campaigns focused on visibility and recall, while performance goals were reserved for the mid and lower funnel. Today, however, consumers do not move neatly down a linear path. They shift fluidly between discovery, consideration, and purchase across platforms and devices. A single connected TV ad, for instance, can spark discovery and drive immediate action when paired with the right call-to-action.



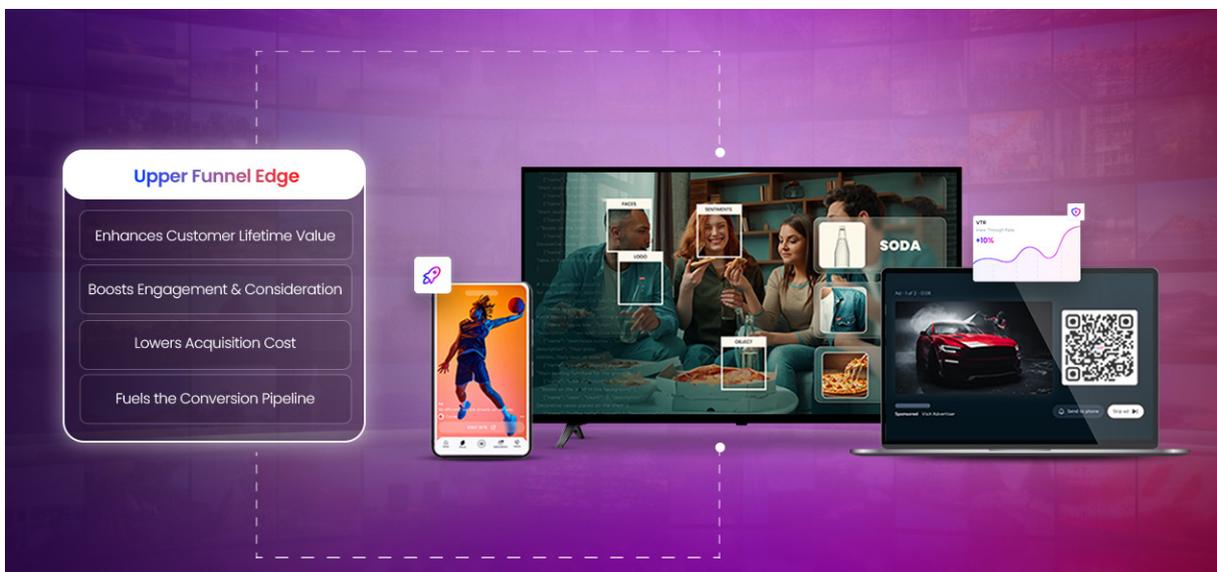
Automation: The Bridge Between Awareness and Action

Today, as AI and automation streamline ad operations, digital advertising has led to an era of performance-driven upper-funnel ads. Previously, awareness campaigns were measured primarily by outcomes like impressions and reach, which created a significant gap between visibility and tangible brand outcomes. However, thanks to advances in programmatic exchanges, AI-based attribution, and attention metrics, that gap has collapsed. Brands are no longer content with merely being seen and demand concrete proof that their advertising efforts translate into actual brand impact.

In this context, Indonesia’s CTV display ad spending¹ is projected to reach \$33.35 billion by 2025 and represents a powerful bridge between storytelling and measurable performance. With the rapid advancements in CTV tech and the introduction of a unified platform, CTV ads have become much easier to manage. At the heart of this transformation lies automation, which enables brands to execute campaigns that respond instantly to consumer

behavior. By integrating AI, real-time optimization, and cross-channel data, automation enhances efficiency and redefines the role of the upper funnel as an accountable growth channel, and in doing so, it blurs the line between branding and performance. Also, currently, 32% of Indonesian advertisers have partially integrated AI into their ad strategies, while only 16% have fully embraced it.²

Moreover, attribution has long been identified as the missing link in brand campaigns. These metrics recast awareness as the starting point of measurable outcomes, enabling advertisers, both in Indonesia and globally, to showcase the performance value of campaigns previously deemed “immeasurable.”



Advertising Powered by Context

Additionally, storytelling is evolving beyond a one-size-fits-all approach, thanks to Dynamic Content Optimization that tailors messaging dynamically. This ensures that audiences receive ads that resonate with their specific contexts and digital behaviors. CTV’s video-level intelligence facilitates contextually aware ad insertions across its inventory, eliminating the need for reliance on identity-based signals. This level of targeting allow brands to craft ads based on variables such as the specific content being consumed, the device or platform used, language, demographics, ad placement, and even sequence-level targeting in real time. For example, a consumer streaming a comedy show on a smart TV might see a story-driven beverage ad that complements the relaxed entertainment setting. Meanwhile, a user browsing lifestyle content on a mobile device could be served a short, actionable ad for fashion accessories with a direct “shop now” call-to-action. Both experiences are personalized, yet uniquely suited to the consumer’s context and mindset at that moment.

The Future: Growth Through Experience, Not Just Exposure

The future of advertising will not be about bombarding audiences with impressions but creating meaningful, measurable experiences that build brand equity while still delivering outcomes with upper-funnel ads, supercharged with automation, sitting at the heart of this model.

This shift also redefines how we measure success with metrics like brand lift, engagement, and incremental reach, increasingly tied to downstream outcomes such as conversions, loyalty, and lifetime value. In other words, upper-funnel advertising will finally earn its place as a performance driver, not just a cost center.

A Vision Forward

As someone who has spent more than a decade watching digital advertising evolve, I believe we are entering one of its most exciting chapters. Automation is not replacing creativity or strategy, it's amplifying them. It allows advertisers to focus on what matters most: understanding people, telling stories, and building trust. The future of brand growth will belong to those who see the funnel not as separate silos, but as a connected journey and who embrace automation to turn awareness into action.

In conclusion, the future of advertising in Indonesia and global markets alike is about treating every consumer touchpoint as accountable growth capital. The winners will be those who begin to build ecosystems where awareness, engagement, and conversions flow seamlessly into one another. Given the declining attention spans of viewers and fierce competition for screen time, growth in 2025 and beyond will not come from merely seeking visibility but from proving that every moment of attention is an investment in long-term brand value.

¹eMarketer. (2024). One of largest sources of new video ad inventory spending: CTV.

<https://www.emarketer.com/content/one-of-largest-sources-of-new-video-ad-inventory-spending-ctv>

²MMA Global. (2024). Indonesia state of AI in marketing report. <https://mmaglobal.com/documents/indonesia-state-ai-marketing-report>



EDO FERNANDO

Country Head-Indonesia



**Make Over
Mastershade XR:**
Redefined
Beauty Through
Data, Diversity,
and Purpose

Introduction

In Southeast Asia’s dynamic beauty market, Make Over had successfully built strong equity in color cosmetics but remained under-leveraged in the complexion segment. Indonesia held the region’s broadest shade range; where diversity in +7000 skin tone representation has historically been overlooked, perpetuating narrow ideals of beauty. As category growth began to plateau, the brand confronted a structural challenge: a market still shaped by light-skin bias and limited representation, where consumers struggled to find their true shade and master application techniques. This insight revealed an untapped growth lever shade expertise as both a brand differentiator and a cultural statement. In 2025, Paragon’s Make Over brand launched **Make Over Mastershade XR**, a campaign designed not merely as a product launch but as a movement for inclusive beauty. Through data-driven, creator-led, and expert-powered initiative, Paragon positioned itself as a **champion of diversity, equity, and inclusion (DEI)** and transformed the makeup category from aspiration to empowerment.

“Make Over Mastershade XR more than just makeup shades. It was about unlocking confidence and celebrating individuality for every Indonesian woman.” – Paragon

Brand Purpose & DEI in Action

At the heart of Make Over Mastershade XR was a commitment to dismantle long-standing barriers in beauty access. Recognizing that many Indonesian women struggle with mismatched shades and undertones, Paragon sought to **elevate complexion inclusivity into the national conversation.**

Three DEI Pillars:



- **Diversity:** Proprietary **Complexion & Color Finder** informed by skin-tone mapping across 1,000 multi-ethnic Indonesian women.

- **Equity:** Democratized access to professional consultations, ensuring expertise was shared widely, not reserved for a select few.
- **Inclusion:** Creator-led storytelling empowered consumers to embrace their individuality and author their own transformation stories.

Make Over Mastershade XR demonstrated innovation on three key fronts:

- **Tech and Human Synergy:** Complexion & Color Finder (CCF) technology enabled hyper-personalized product matching, amplified by empathetic, expert guidance from professional MUAs.
- **Omnichannel Engagement:** Offline consultations, TikTok-led activations, and e-commerce integrations create a full-funnel ecosystem bridging discovery, trial, and purchase.
- **Cultural Relevance:** Normalized darker shades and undertones, directly challenging colorism narratives and reframing beauty as self-discovery rather than concealment.

The Power of Inclusive Results

- **33.4K user-generated content pieces** ignited nationwide buzz.
- **455M impressions** amplified inclusive beauty narratives across social media.
- **20%+ sales uplift** in complexion products within campaign period.
- **Fully booked consultation sessions** across Indonesia, proving high consumer appetite for **inclusive, personalized experiences**.

Impact Beyond Metrics: Mastershade sparked a life-changing experience. Women left consultations with not only the right product but also confidence, clarity, and self-acceptance.

The case study delivers three critical lessons for the modern marketer:

1. **DEI as a Growth Driver.** Diversity is not an add-on. When embedded into the core product and narrative, it builds both **equity and market share**.

2. **Data + Culture = Scale.** Leveraging data-driven insights while tapping cultural truths allows campaigns to scale impact authentically.
3. **Emotional Transformation is Loyalty.** Consumers reward brands that help them feel **seen, valued, and celebrated.**

Beyond Shades - A New Standard for Beauty

Paragon's Mastershade XR campaign underscores a future where campaign innovation and DEI converge. By turning inclusivity into both a business advantage and a cultural statement, Paragon redefined beauty leadership in Indonesia.

This case sets a benchmark for the industry: when brands lead with **purpose, diversity, and authenticity**, they unlock not only consumer trust but also sustainable growth in an evolving market.



ADINDYA NATASYA
Digital Strategist Head



FIRDA ULYA SYAHADAT
Omnichannel Media & Strategic Partnership



**Redefining Everyday
Reliability:** How vivo
Y29's #GakHabisHabis
Campaign Empowered
Indonesia's Daily
Heroes

At vivo, we believe technology is meaningful only when it empowers people's everyday lives. In Indonesia, smartphones are not just tools for connection — they are essential for livelihood. For millions of ride-hailing drivers and hardworking users across the country, a reliable phone is not a luxury, but a necessity.

This belief became the foundation of our campaign for **vivo Y29** — a product built for endurance, and a story built on empathy. Through **#GakHabisHabis**, we set out to redefine what “affordable” means, transforming it from a functional claim into a message of reliability, respect, and real-life relevance.

“For us, innovation is not only what's inside the device, but how it empowers the everyday heroes who use it.” – vivo Indonesia

Brand Purpose & Social Impact in Action

The purpose behind Y29 was clear: to make reliability a form of respect. In a market where affordability often dominates communication, we wanted to elevate the Y Series into a brand that truly understands and celebrates the resilience of its users.

We built the campaign on three key pillars of social impact:¹

- **Representation:** We featured everyday heroes; like drivers; as the face of Y29's strength, spotlighting the real symbol of endurance.
- **Community Connection:** We brought vivo closer to people's lives by activating in spaces that matter; from Ramadan iftars to local markets — ensuring the brand was part of shared cultural moments, not just visible through ads.
- **Empathy in Action:** Engagement became giving. We shared thousands of iftar meals, turning campaign reach into meaningful gestures of care.

By stating our message in empathy and inclusion, we turned a product story into a story about people showing that reliability is not just about performance, but about understanding human needs.

What Makes This Different

The **vivo Y29 #GakHabisHabis** campaign combined innovation, creativity, and community spirit to bring the brand purpose to life.

- **Purpose-Led Storytelling:** The **#GakHabisHabis Trip** followed real endurance stories, capturing how Y29 keeps up with life's challenges; from morning rides to late-night deliveries.

- **Omnichannel Integration:** We created a seamless journey across TikTok, Meta, Google Ads, and SEM to reach users nationwide, supported by on-ground experiences at M Bloc and Kota Tua, where people could test the phone and share moments together.
- **Cultural Celebration:** The launch culminated with a 6,500-drone light show ; a celebration of endurance and unity that turned technology into art and captured national attention.

Our approach combined innovation with emotion, proving that empathy-driven storytelling can build both engagement and cultural relevance.

The Power of Purposeful Impact

The results showed that empathy creates impact – not only for business, but also for communities:

- **Stronger Engagement:** Online interactions and service inquiries grew several times higher than in previous Y Series launches.
- **Community Reach:** Tens of thousands joined on-ground activations; thousands more experienced the product and shared iftar moments with us.
- **Business Growth:** Sales exceeded internal targets by double-digit percentages, search interest rose sharply, and brand perception shifted from “affordable” to “reliable and trusted.”

Impact Beyond Metrics

For vivo, success was measured not only in numbers, but in how people felt seen and valued. Y29 became more than a smartphone ; it became a reflection of resilience and togetherness.

The campaign revealed three important lessons for how we build brand impact:

- **Empathy Builds Trust:** When we communicate with understanding, we earn long-term loyalty.
- **Culture Creates Relevance:** Entering real cultural spaces allows a brand to belong, not just appear.
- **Purpose Drives Growth:** When innovation meets human stories, marketing becomes meaningful.

Beyond Specs; A New Standard for Reliability

With vivo Y29 #GakHabisHabis, we redefined the role of the Y Series; from an affordable option to a reliable companion for those who power Indonesia's daily life.

By placing empathy and community at the centre of innovation, we showed that reliability is more than a product promise; it's a purpose.

At vivo, we believe true innovation doesn't stop with the device. It continues in how we connect with people, celebrate their strength, and stand beside them.

That's what #GakHabisHabis truly means.

¹vivo Internal Data



URSULA CINDY

Media Director



Unlocking the Power of Dynamic Transit Advertising

Consider reaching the right people with the right message at the right time and when it matters. That's where Programmatic Digital Out-of-Home (DOOH) comes in. It enables automated, data-driven advertising on digital screens in public spaces that allows brands to target audiences based on location, time of day, behavioral patterns, and events, making it possible to run highly efficient, flexible campaigns that adapt in real time. In Indonesia, with the DOOH market expected to reach **USD 4.84 billion by 2025¹**, it is growing rapidly, especially in transit environments. **Railway transportation alone saw steady growth**, rising from **43.36 million passengers in January to 50.11 million in July 2025**, marking an increase of approximately **6.75 million passengers** over the seven-month period.² This upward trend highlights how Programmatic transit DOOH can effectively tap into these high-traffic spaces like buses, trains, and stations, offering brands access to large, moving audiences. It becomes even more impactful during peak or seasonal periods like Ramadan, when routines shift and messaging needs to be both timely and culturally relevant.

With great opportunity come significant challenges for Programmatic Transit DOOH, including changing commuter behavior, inconsistent foot traffic, and the need for cultural sensitivity, especially during seasonal periods like Ramadan. To stay effective, brands need to be quick, adaptable, and ready to update messaging in real time.

Still, when done right, it works. According to the **Out of Home Advertising Association of America (OAAA)**, as reported by eMarketer³, **51%** of people who saw the ad visited the store, and **93%** of them made a purchase. That's the real impact from the right message in the right place.

Case Study: AQUA's Ramadan Ride Where Every Sip Counts

AQUA, a leading bottled water brand, aimed to reach commuters during Ramadan and encourage hydration before and after the evening meal. Ramadan brought shifts in commuting patterns, media relevance, and consumer mindsets, making culturally meaningful engagement essential. The challenge was not just scale but delivering the right message with precise timing, context, and cultural fit.

Key Takeaways:

- Ramadan redefined commuter footfall and media habits.
- Culturally relevant storytelling around daily rituals proved essential for engagement.

Solutions

Programmatic Transit DOOH was utilized to show timely ads on key transit routes during Ramadan. The campaign focused on busy commuter rail lines and used creative content that changed in real time to match the day’s rhythm. By looking at mobile and ridership data, AQUA tailored messages about hydration before Iftar and community themes after. The ads were automatically placed and managed using geofenced screens and a live dashboard, allowing AQUA to adjust the campaign throughout the day to reach people when it mattered most.



Key Takeaways:

- Audience data helped target messages accurately
- Creative content matched daily Ramadan routines
- The campaign was adjusted hourly using live data

Outcomes

Over a 29-day period, the campaign expanded reach and delivered impressive visibility, with consistent ad exposure across key transit locations. Brand awareness was notably increased during critical pre- and post-meal timeframes, resulting in strong ad recall and a significant lift in purchase intent.



Key Takeaways:

- Broad and diverse commuter engagement
- High ad recall and lift in purchase intent
- Positive shifts in brand awareness at culturally significant moments

Conclusion

Programmatic DOOH unlocks strategic advantages for brands during culturally high-impact periods. Blending precise audience insights, data-driven targeting, and relevant storytelling, this approach enables influence at moments and locations of greatest resonance.

Key Learnings:

- Align messaging with local customs and peak consumer routines for emotional resonance
- Leverage live data for real-time campaign optimization
- Context-based messaging outperforms demographic targeting
- Cross-functional agility and rapid feedback loops enhance iterative improvements
- Track dwell time, recall, and purchase intent to measure full campaign impact

Programmatic DOOH empowers brands to be present exactly when and where it matters most, making campaigns impossible to ignore.

¹Statista. (2025). Digital out-of-home advertising - Indonesia. <https://www.statista.com/outlook/amo/advertising/out-of-home-advertising/digital-out-of-home-advertising/indonesia>

²BPS Indonesia. (2025). Number of passenger of railways transportation (Thousand people), 2025. <https://www.bps.go.id/en/statistics-table/2/NzljMg==/number-of-passenger-of-railways-transportation.html>

³Emarketer. (2024). 3 ways data can improve OOH campaign performance. <https://www.emarketer.com/content/3-ways-data-improve-ooh-campaign-performance>

**ERLINDA TRIANA**

Sales Manager-Indonesia



Beauty as a Cultural & Digital Powerhouse

Indonesia's Beauty Market has become one of the strongest performing industries with 16% annual growth which is 4x faster than total FMCG, it is projected to reach US\$9.74bn in 2025 (~157 trillion IDR) with 19.6% from online sales and expecting 4.33% CAGR (2025–2030).¹ Shifting consumer preferences across skincare, makeup and hair treatments are creating new opportunities for brands to grow categories and connect with shoppers in more meaningful ways.²

This is more than category growth; it marks a cultural inflection point. Beauty is no longer just a product-driven industry; it is a fusion of cultural expression and digital-first behavior.

As an agency, our response is to help brands navigate this momentum by:

- Anticipating shifting consumer rituals across categories.
- Embedding campaigns in cultural codes that resonate with digital-native consumers.
- Turning community influence into commerce engines that drive meaningful engagement.
- For OMG, success in this sector is not about following growth, it is about engineering relevance in a market where culture and digital fluency define brand power.

For us, the response isn't just to follow growth, it's to **engineer relevance** in a category where culture and digital fluency define brand success.

Reclaiming Relevance sparking a Gen Z Skincare Moment

We believe growth comes when brands intersect consumer passion with cultural relevance. For beauty, this means recognizing a new generation of digital-native, ingredient-savvy consumers who rely on community validation and remix global trends with local flair.

More than numbers, Indonesia has become a cultural powerhouse, fueling this rise is a young, **digital-native population**. Indonesia's youthful and tech-savvy demographics are highly receptive to innovative beauty solutions, such as personalized skincare and digital-first experiences. From innovation to hybrid beauty trends, the sector is rapidly evolving, catering to the unique needs of Indonesia's culturally diverse consumers.³

This is not just a numbers game. Indonesian consumers remix global trends with local flavor such as searching "K-beauty in Jakarta" or "Paris parfum in Condet" or "Citayem Fashion Week". Gen Z's appetite for authenticity and cultural relevance meant campaigns needed to reflect shared memories,

everyday humor, and relevant to Indonesian values in ways that felt real. On platforms like TikTok where over 50% of content consumed is comedy-related, meme culture has become the universal language for Gen Z.

Flipping the social-first script by creating a cultural movement

From a Tree to a Forest Fire, from a simple chair under a tree, Emina didn't just sell moisturizer, it redefined market power. Emina's Makeup Bawah Pohon (Makeup Under the Tree) inspired by Indonesia's outdoor barbers, the campaign staged a raw, discoverable cultural moment: a teen offering pay-what-you-want makeup sessions under a tree. It wasn't advertising, it felt like something Gen Z stumbled upon organically.

What started as a makeup chair under a tree ignited a movement, cultural storytelling isn't just marketing, it's the new market power.

1. **The Power of Unfinished Stories, Endless Curiosity:** Open-ended outcomes ("Would people pay? Would it work?") drove 4.2x more shares than polished tutorials.
2. **Social Currency Engineering:** Instagrammable details (tree lighting, water-drip demos, a simple wooden stool) boosted 92% recall without logos.
3. **Reverse Engineering the Algorithm:** To amplify reach, the team hacked TikTok's FYP mechanics using 60+ proxy accounts to mimic organic user behavior, the campaign seeded authentic momentum and rode the algorithm's preference for real, relatable content.



How We Elevate Brands Through Cultural Storytelling

1. **Authenticity:** Speak the audience's language with real, raw storytelling.

Emina's Proof: Pay-what-you-want sessions under a tree felt organic, not staged.

- 2. Culture:** Put culture before campaigns by tapping into everyday behaviors and humor.

Makeup Bawah Pohon mirrored local traditions, sparking 44M+ views & 7,000 UGCs.

- 3. Precision:** Scale cultural ideas with data-driven execution.

Emina Engineered TikTok virality, +614% Share of Voice, 8.3% conversion.

Conclusion

When Authenticity, Culture, and Precision intersect, brands don't just advertise, **they ignite movements**. We believe **culture is the new media, and community is the new channel**. This campaign proved that when brands lean into cultural storytelling grounded in authenticity, designed for digital behavior, and scaled with precision they ignite more than sales. They spark movements.

¹Statista (Feb-25): <https://www.statista.com/outlook/cmo/beauty-personal-care/indonesia>
Currency Exchange 1 USD = 16,410 Rupiah

²Kantar (Apr-25): <https://www.kantar.com/Inspiration/FMCG/Why-Indonesia-s-beauty-market-is-growing-faster-than-ever>

³Investinasia: <https://investinasia.id/blog/beauty-industry-in-indonesia/>



INTAN RAHMATILLAH

Sr. Business Lead



FAJAR ADITHYA

Associate Media Director



**From Prepared to
Protected:** Everyday
Readiness, Everyday
Protection

Turning Everyday First Aid into a Social Movement: #SediaHansaplastSebelumTerluka

Indonesia has made significant progress in healthcare awareness, but **basic first aid knowledge remains low**. Research shows only 1 in 5 Indonesians are ‘first aid ready’ in their daily lives.¹ Injuries happen everywhere — at home, on the road, in schools, and workplaces — yet first aid is often treated as an afterthought, only considered once an accident occurs.



Many people focus on nutrition and exercise but remain unprepared for sudden emergencies.

Wound care is often seen as complex or left to “heal naturally,” leading to infection, scarring, or delayed healing.² Children and the elderly are especially vulnerable.

For brands and healthcare advocates, this gap is both medical and behavioral.

The challenge: make first aid as natural as carrying sanitizer or wearing a helmet.

Objective

Hansaplast, a leading wound care brand in Indonesia, set out to transform **World First Aid Day** into more than just an annual observance. The objective was clear:

- **Busting Wound Healing Myths**
- **Elevate first aid from reactive to proactive behavior**
- **Raise public awareness** through engaging, accessible education
- **Position Hansaplast as essential for everyday readiness**

Discussion: Literature Review

Public health research consistently shows that early intervention during injuries significantly reduces complications. The World Health Organization (WHO) underlines that community-level first aid knowledge can save lives, yet most populations underestimate its importance.³

In behavioral theory, health habits often require both **education and cultural embedding**.⁴ Studies in preventive health campaigns (e.g., handwashing or helmet use) demonstrate that when practices are tied to everyday culture and social identity, they achieve far greater adoption.⁵ Building on this framework, Hansaplast recognized that **awareness campaigns alone were insufficient**. To succeed, first aid readiness had to become socially relevant, shareable, and aspirational.

Current Data and Insights

The campaign tapped into several critical Indonesian market realities:

- **Digital Penetration:** With **139 million active social media users** (49.9% of the population), Indonesia is among the world's most engaged digital societies.⁶
- **Influencer Power:** Research shows **76% of consumers are influenced by creators** before making a purchase, making KOLs a vital bridge for behavior change.⁷
- **Cultural Gaps in Readiness:** Despite enthusiasm for wellness, few Indonesians carry basic first aid supplies in daily life, showing the need for habit re-education.⁸

Hansaplast identified its opportunity not in lecturing consumers, but in **meeting them where they spend time — on TikTok, Instagram, and X — and reshaping first aid into a relevant lifestyle choice.**

Transforming Wound Care Culture

In 2024, Hansaplast launched **“*Hati-Hati Jalani Hari - #SediaHansaplast Sebelum Terluka,*”** a nationwide movement that shifted how Indonesians perceived wound care. Anchored by influencer-driven buzz, Mega KOL Jirayut captured Gen Z through humor, while lifestyle micro-influencers brought authenticity across parenting, fitness, and travel communities.

By blending education with entertainment, the campaign made first aid feel simple, relevant, and cultural. Tutorials, story challenges, and viral skits drove participation, sparking conversations in schools, families, and media. The impact not only set new benchmarks in FMCG and health marketing but also reframed readiness as an everyday habit.

Case Study: When Virality Meets Public Health

The breakthrough came when Jirayut shared a TikTok of slipping while boarding a train, then casually applying Hansaplast. The mix of humor and practicality went viral, spreading across TikTok and Instagram within hours. Headlines praised the moment — **“*Jirayut Jatuh di Stasiun, Untung Ada Hansaplast!*”** — turning a joke into a public health lesson.



Without PR spend, the story gained traction in massive **TV infotainment shows**, embedding first aid education into mainstream culture.

This virality validated Hansaplast's strategy: when health messaging is tied to authentic, entertaining content, it becomes both relatable and memorable.

Conclusion

Hansaplast's World First Aid Day campaign successfully **shifted consumer behavior** — from ignoring first aid to preparing proactively. By reframing wound care as a socially relevant habit, the brand achieved both **business growth** and **public health impact**.

In the broader marketing landscape, this case demonstrates the power of **purpose-driven campaigns**. Brands that combine education with cultural relevance can transcend commercial goals, shaping healthier societies.

Hansaplast proved that **first aid can go viral** — and when it does, it saves more than impressions; it saves lives.

¹Badan Kebijakan Pembangunan Kesehatan. (2023). Survei kesehatan Indonesia (SKI) 2023. Kementerian Kesehatan Republik Indonesia. <https://nam04.safelinks.protection.outlook.com/GetUrlReputation>

²Wounds International. (2021). Ten top tips: Myth-busting wound care. <https://woundsinternational.com/journal-articles/ten-top-tips-myth-busting-wound-care/>

³World Health Organization. (n.d.). Improving care of the injured. <https://www.who.int/activities/improving-care-of-the-injured>

⁴DataReportal. (2024). Digital 2024: Indonesia. <https://datareportal.com/reports/digital-2024-indonesia>

⁵Marketing Interactive. (2025). Study 76% of Indonesians shop through creators despite declining trust. <https://www.marketing-interactive.com/study-76-of-indonesians-shop-through-creators-despite-declining-trust>

⁶DataReportal. (2024).

⁷Marketing Interactive. (2025).

⁸Badan Kebijakan Pembangunan Kesehatan. (2023).



VIVILYA LUKMAN

Business Unit Health Care Director

Beiersdorf

**Indonesia's
Creative
Economy is
Surging
Through Social
Commerce**

Indonesia stands at the crossroads of entertainment and commerce as social commerce reshapes the nation's buying habits. Live video, social media and e-commerce now flow together as one experience. By 2025, Indonesia's social commerce market is projected to reach USD 5.25 billion, underscoring its rapid growth trajectory.¹ Analysts expect the market to keep climbing toward a gross merchandise value of roughly US \$22 billion by 2028.²

This rapid growth is powered as much by culture as by technology. A strong sense of community and peer influence has turned Instagram and TikTok into launchpads for micro-businesses and live shopping streams. A 2024 Jakpat study shows that nine in ten Gen Z viewers watch live sessions and 62% buy directly, spending an average of Rp414,000 each month, a 14 percent increase from 2023.^{3 4} Analysts widely point to live shopping, influencer-led commerce and seamless in-app payments as key forces driving Indonesia's social-commerce growth, a view echoed in Campaign Asia's coverage of the market.⁵

Shoppertainment, the entertainment-driven side of social commerce, is redefining how brands create and capture value. What began as a channel for awareness has quickly become a driver of measurable sales, with live shopping emerging as its most powerful expression.

Live Shopping as a Transformative Retail Track

Live shopping has moved beyond its early days as a novel experiment and is now a transformative form of e-commerce. Brands and sellers use real-time video streaming not only to present and demonstrate products but also to interact directly with viewers who can ask questions and purchase instantly. Its purpose is to blend entertainment with commerce, creating a more personal and engaging shopping experience that drives both brand awareness and measurable sales. A 2024 survey by GoodStats shows that 57% of Indonesian sellers use Shopee Live and 49% use TikTok Live to boost sales.⁶ The impact is evident: during Shopee's 9.9 Shopping Days, live shopping lifted sales by 30x and increased viewership by 7x compared to regular days, underscoring its role in driving both visibility and conversion for brands.⁷

FMCG brands set the stage for live shopping in Indonesia, proving that interactive streams could move everyday products at scale. However, once the format established credibility for basics, consumers began expecting the same experience for higher-stakes purchase. In a city like Jakarta, where mobility is central to daily life, the need of reliable products for their vehicles is becoming part of the live shopping arena. Shell emerging as a notable example that outside category of FMCG plays its live shopping experience like no others.

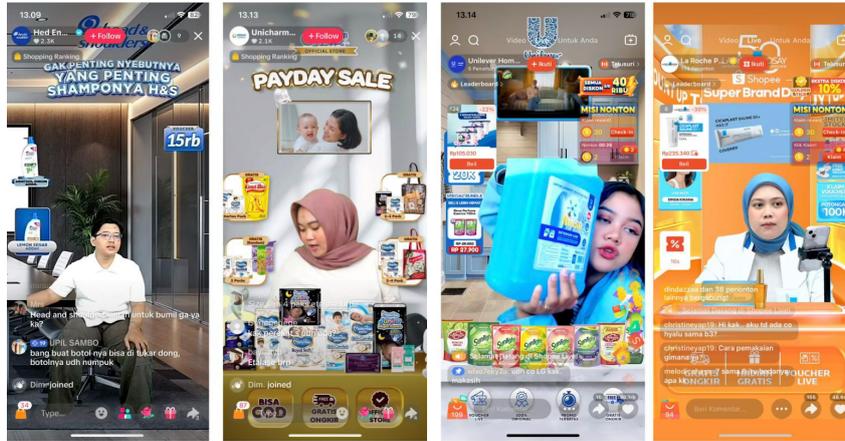


Image 1: FMCG brands in Indonesia using live shopping, featuring Head & Shoulders, Unicharm, Unilever, and La Roche-Posay. Desk research, 2025.

Shell has stepped into live shopping by hosting regular Shopee Live sessions that showcase its motorbike and car lubricants through engaging, real-time demos and Q&A. Rather than relying on discounts, the brand focuses on education and trust, helping customers identify authentic products in a market crowded with counterfeit options. The approach has delivered clear results: over 20% of total Shopee sales volume consistently came from live-shopping sessions during peak months, conversions averaged 1 order every 5 minutes, and organic reach and loyalty grew with tens of thousands of cumulative live views and a steady follower increase. These outcomes show that premium automotive products can thrive in live commerce without heavy promotions.

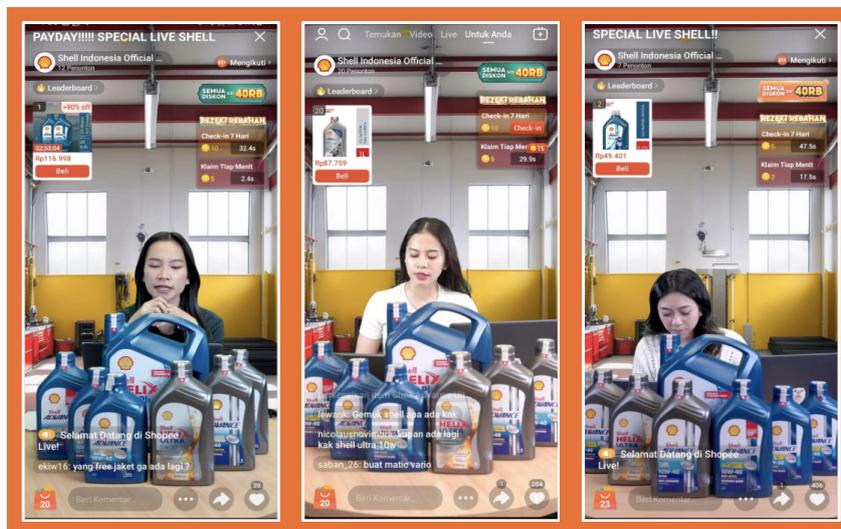


Image 2: Shell Indonesia showcasing its motorbike and car lubricants through Shopee Live sessions as part of its social commerce strategy. Shopee store analysis, 2025.

Indonesia's creative economy shows that social commerce is no longer just a marketing tool but a strong driver of sales and brand growth. Younger generations are already comfortable buying through live shopping, and Shell demonstrates how established brands can reach new audiences, build trust, and protect product integrity. The key takeaway is that Indonesia's creative economy is surging through social commerce, and brands that master this intersection of creativity, data, and live-commerce innovation will set the benchmark for growth in the years ahead.

¹GlobeNewswire. (2025, May 12). Indonesia social commerce market intelligence report 2025-2030: Mobile commerce dominates, authenticity and personalization key to growth. <https://www.globenewswire.com/news-release/2025/05/12/3079272/28124/en/Indonesia-Social-Commerce-Market-Intelligence-Report-2025-2030-Mobile-Commerce-Dominates-Authenticity-and-Personalization-Key-to-Growth.html>

²Digital Start Indo. (2025). Mastering social commerce in Indonesia: TikTok, Instagram, and beyond for 2025. <https://digitalstartindo.com/social-commerce-indonesia-2025/>

³Jakpat. (2024). 2024 online shopping trends: 62% of Gen Z shop via live shopping. <https://insight.jakpat.net/2024-online-shopping-trends-62-of-gen-z-shop-via-live-shopping/>

⁴Media Indonesia. (n.d.). Survei: 62 persen Gen Z pilih belanja via live shopping [Survey: 62% of Gen Z prefer shopping via live shopping]. <https://mediaindonesia.com/ekonomi/745049/survei-62-persen-gen-z-pilih-belanja-via-live-shopping>

⁵Campaign Asia. (n.d.). Ledakan pasar Asia Tenggara: Bagaimana Indonesia meredefinisikan social commerce [Southeast Asian market explosion: How Indonesia is redefining social commerce]. Campaign Indonesia. Retrieved from <https://www.campaignindonesia.id/article/ledakan-pasar-asia-tenggara-bagaimana-indonesia-meredefinisikan-social-commerce/1930241>

⁶GoodStats. (2024). Platform live shopping terbanyak digunakan di Indonesia tahun 2024 [Data set]. <https://data.goodstats.id/statistic/platform-live-shopping-terbanyak-digunakan-di-indonesia-tahun-2024-56W4S>

⁷IDX Channel. (n.d.). Penjualan brand lokal melonjak berkat fitur live streaming di Shopee 9.9 super shopping day [Video]. <https://www.idxchannel.com/playlists/penjualan-brand-lokal-melonjak-berkat-fitur-live-streaming-di-shopee-99-super-shopping-day>



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