

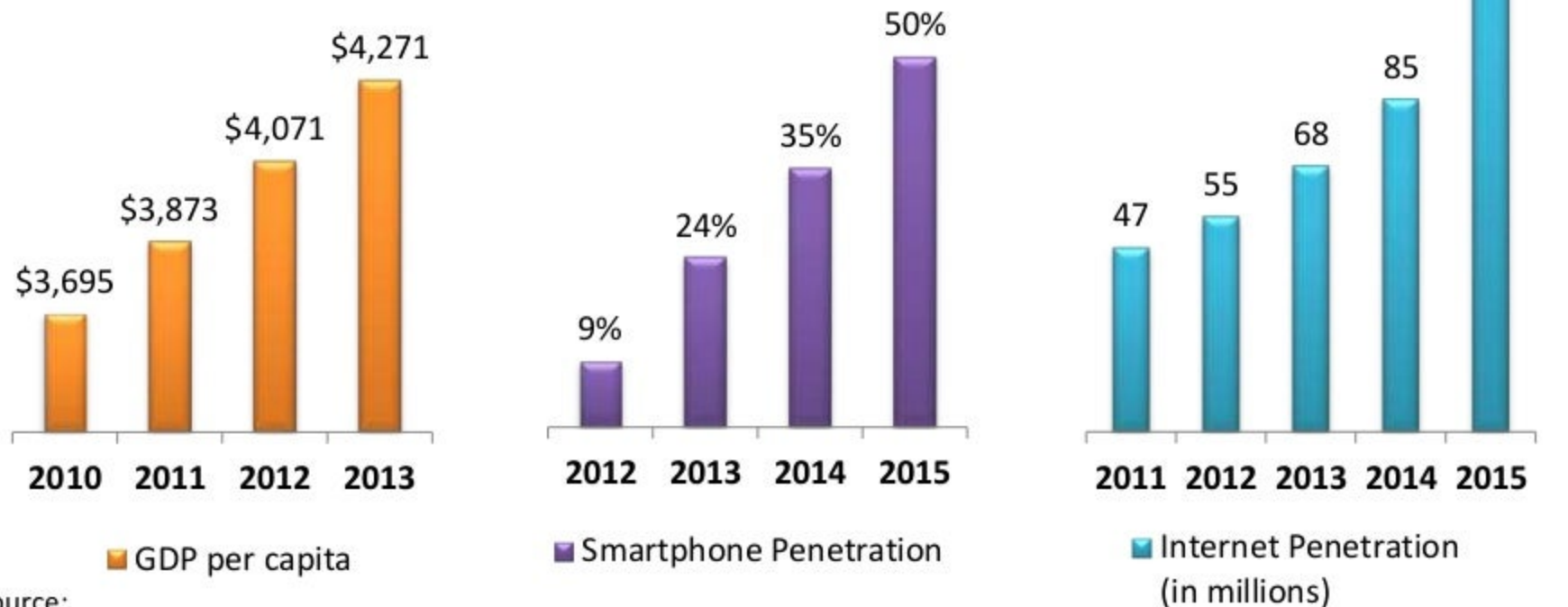


UC Inside, World in Hand

Market Research December 2014 Indonesia

- | | |
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| 1 | Country Overview |
| 2 | Mobile Internet ecosystem |
| 3 | Mobile Internet business model |
| 4 | Investment enrolled on Internet |

- Population: (July 2013 est.) 251,160,124
- GDP (per capita): (2014) \$4,271
- Mobile phone penetration: (2014) 278 million (110%)
- Internet penetration: (2014) 80 million (32%)
- Facebook: 4th in the world at 70 million users
- Twitter: 3rd in the world at 30 million users



Source:

<http://www.indonesia-investments.com/news/todays-headlines/social-media-in-indonesia-indonesian-facebook-line-twitter-communities/item2330>

<http://telsetnews.com/82221/gandeng-samsung-telkomsel-ingin-dongkrak-penetrasi-smartphone/>

<http://techno.okezone.com/read/2014/05/14/54/984900/di-indonesia-pelanggan-telko-melebihi-jumlah-penduduknya>

Country Overview

Historical Population of Indonesia

Census	Pop.
1971	119,208,229
1980	147,490,298
1990	179,378,946
1995	194,754,808
2000	206,264,595
2010	237,641,326

Source: www.bps.go.id

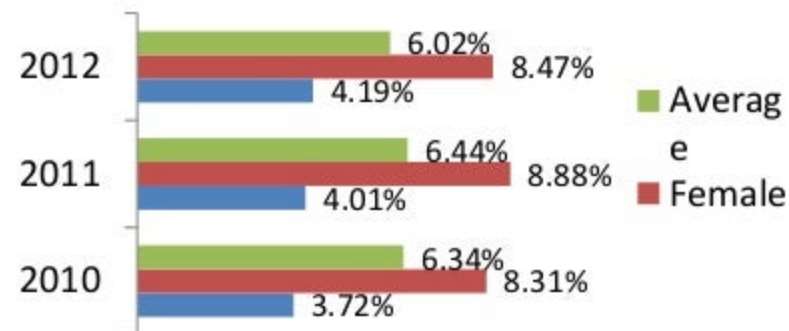
Top 15 Cities

1. Jakarta
2. Surabaya
3. Bandung
4. Bekasi
5. Medan
6. Tangerang
7. Depok
8. Semarang
9. Palembang
10. Makassar
11. Tangerang Selatan
12. Bogor
13. Batam
14. Pekanbaru
15. Bandar Lampung

Gender Ratio



National Illiteracy Ratio



Religious Demographics

Source: <http://sp2010.bps.go.id/index.php/site/tabel?tid=321&wid=0>

Composition	Muslims	Christians	Catholics	Buddhist	Hindus	Others
% total of population 2010	207,176,162 (87.18%)	16,528,513 (6.96%)	6,907,873 (2.91%)	4,012,116 (1.69%)	1,703,254 (0.71%)	1,313,408 (0.55%)

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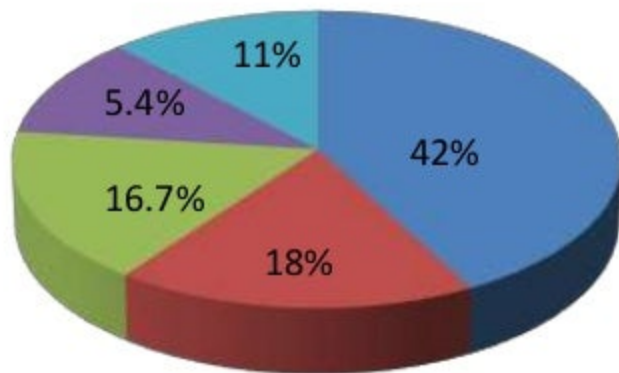
2

Mobile Internet ecosystem

- 1 **Telecom industry**
- 2 Handset Manufacturer
- 3 Internet industry

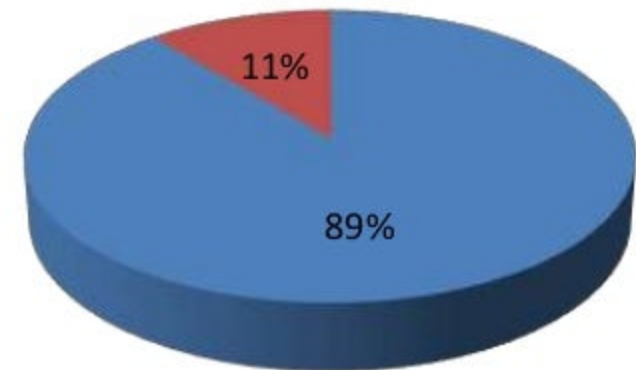
- In Indonesia, there are 6 (formerly 10) GSM/WCDMA & CDMA operators, 1 LTE operator, and 1 WiMAX operator.
- Big 3 telco: Telkomsel, XL Axiata, and Indosat (all GSM operators).
- GSM: Telkomsel, XL Axiata (AXIS merged with XL), Indosat, 3
- CDMA: Smartfren, Telkom Flexi (merged with Telkomsel), Esia, StarOne (merged with Indosat)
- CDMA operators will be gone by 2016. Existing CDMA operators are told to merge or migrate to LTE or be sold to GSM operators.
- Smartfren, the best performing CDMA operator in recent time, is migrating to LTE TDD 2.3GHz from PCS 1900.
- Bolt4G is the country's first commercial LTE operator (data-only) operating LTE TDD on 2.3GHz frequency band. Bolt4G was formerly operating the country's first commercial WiMAX, Sitra Wimax.
- The other WiMAX operator in Indonesia is Berca-owned company called WiGO which serves the eastern part of Indonesia.

Operator's Market Share (%)



■ Telkomsel
■ Indosat
■ CDMA Operators
■ XL+AXIS
■ 3 Indonesia

GSM/CDMA Market Share (%)

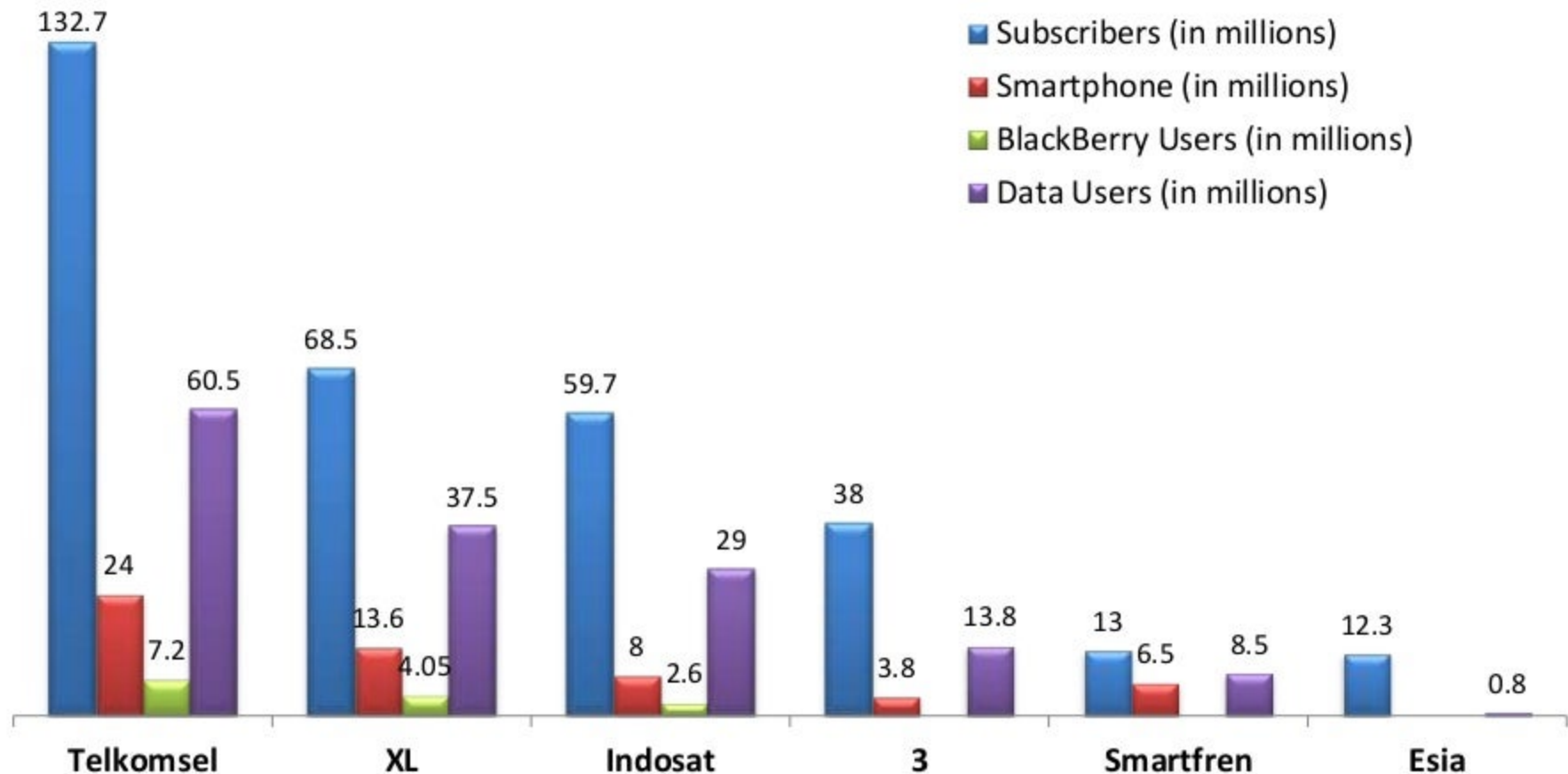


■ GSM
■ CDMA

Source: <http://www.tribunnews.com/bisnis/2013/06/25/telkomsel-xl-dan-indosat-masuk-zona-merah-frekuensi>

By early 2014, there are 240 million Indonesian mobile subscribers and has continuous growth throughout the year. From 2006 to 2010, the annual rate of growth for mobile subscribers is 31.9%.

Source: <http://www.tribunnews.com/bisnis/2013/06/25/telkomsel-xl-dan-indosat-masuk-zona-merah-frekuensi>



Source: (data for 3, Smartfren, Esia are incomplete)

<http://inet.detik.com/read/2014/07/16/081716/2638327/328/berkat-andromax-bisnis-smartfren-moncer>

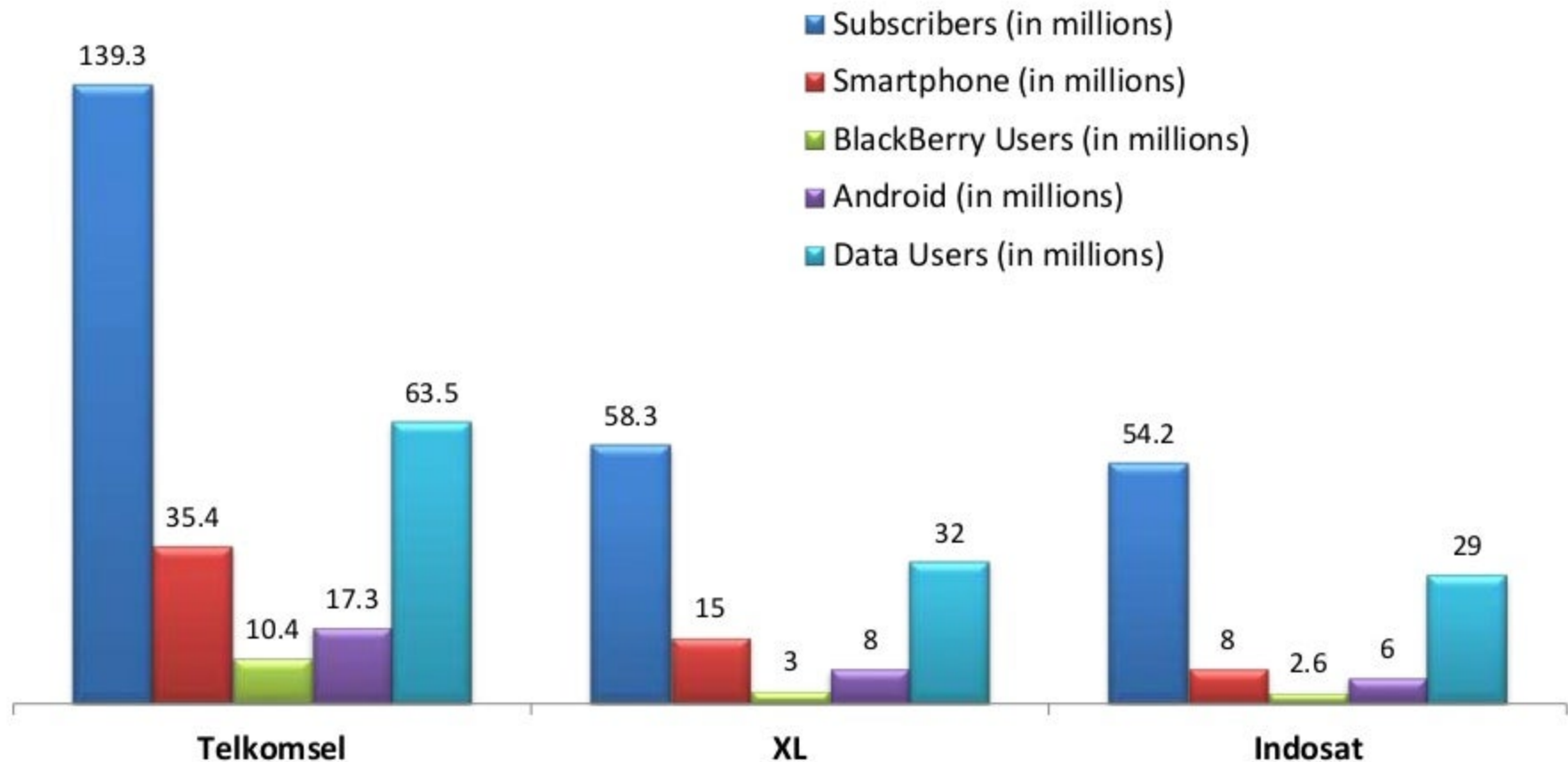
<http://tekno.liputan6.com/read/813266/esia-siap-genjot-pengguna-layanan-data>

<http://www.merdeka.com/teknologi/pengguna-blackberry-di-indonesia-capai-1385-juta-orang.html>

<http://tekno.liputan6.com/read/2078475/smartfren-andromax-kini-jadi-smartphone-sejuta-umat>

<http://www.slideshare.net/yogismobiletech/jumlah-pelanggan-selular-kuartal-i-tahun-2014>

<http://id.techinasia.com/laporan-finansial-operator-gsm-dan-cdma-terbesar-di-indonesia-q1-2014/>



Source:

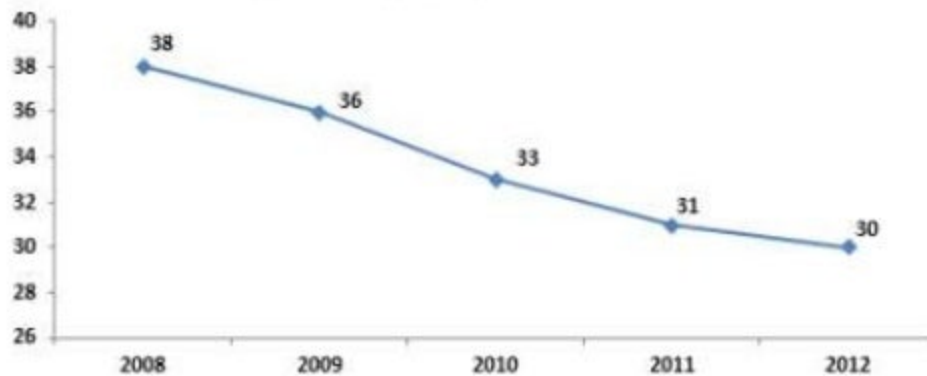
<http://www.indotelko.com/kanal?c=id&it=Indosat-Optimistis-Pelanggannya-tetap-Tumbuh>

<http://inet.detik.com/read/2014/12/10/195833/2773834/328/dibombardir-android-pengguna-blackberry-xl-tetap-setia>

<http://www.tempo.co/read/news/2014/06/06/072583095/Pelanggan-Telkomsel-Android-Lampau-Blackberry>

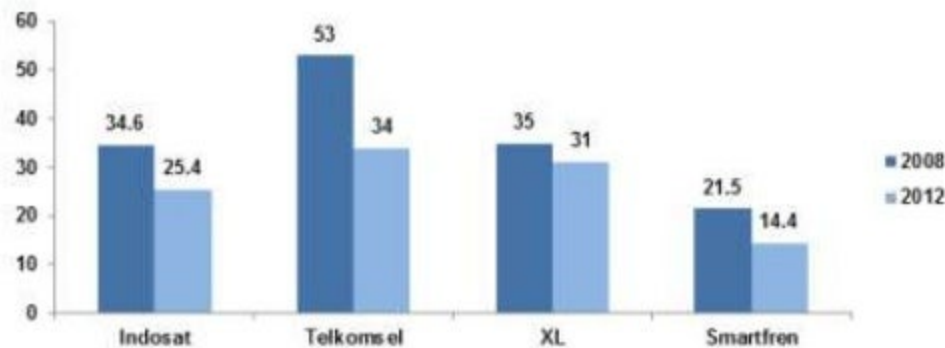
<http://www.beritasatu.com/ipitek/230055-telkomsel-gandeng-17-vendor-smartphone-android.html>

Exhibit 1: Indonesia Prepaid ARPU (Rp'000)



Source: Venture Consulting Analysis

Exhibit 2: Prepaid ARPU (Rp'000)



Source: Venture Consulting Analysis

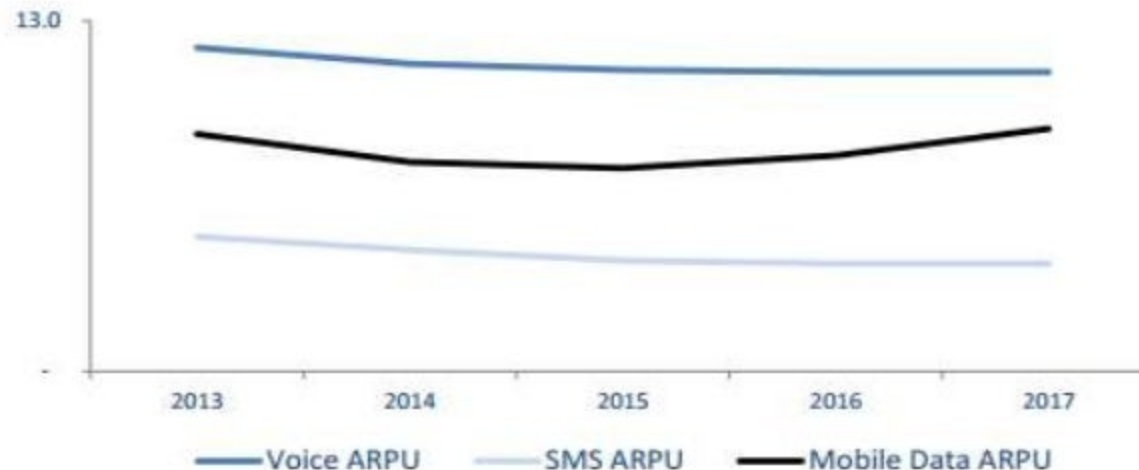
- Initially reduced ARPU was due to massive price war, initiated by the government.
- CDMA operators managed to force GSM operators to reduce their tariffs.
- Recently people use data-based IM, VoIP, etc. thus leads to even less usage of SMS and voice call.
- Tariffs have hit rock-bottom thus there will not be any price war anymore.
- Less usage on SMS and voice also lead to reduced ARPU.

Source:

<http://www.ventureconsulting.com/assets/indo-mobile-Arpu4.pdf>

ARPU seems to declining because of multi-sim usage and availability of cheap mobile phones. With cheap mobile phones, the lower income people can afford to have multiple phones from various operators to benefit from cheap on-net calls.

Exhibit 3: Indonesia ARPU Forecasts (Rp'000)



Source: Venture Consulting Analysis

- Voice ARPU will continue to flatten in the medium term.
- SMS ARPU will continue to decrease, because majority of users will be on smartphones eventually.
- Data ARPU will fall in short term, but will pick up later as users data consumption increases.
- Continued trend of declining ARPU until 2015 where data users will start to enroll for bigger data plans due to increased usage of the mobile Internet and compensate the declining voice and SMS ARPU.

Source:

<http://www.ventureconsulting.com/assets/indo-mobile-Arpu4.pdf>

2 Mobile Internet ecosystem

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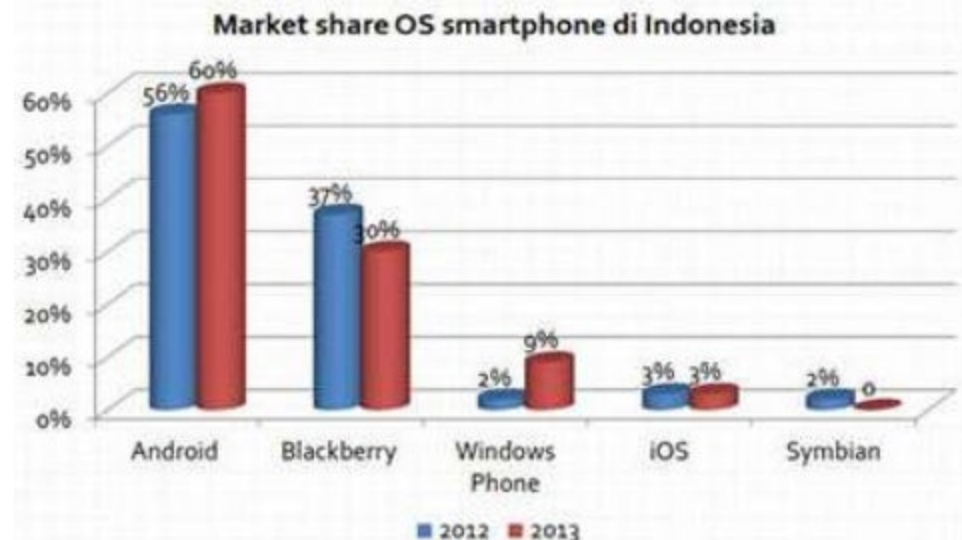
Local mobile handset makers are aggressive marketers trying to be the leading brand.

Top Smartphone Mobile Brand in Indonesia

- Samsung
- Smartfren
- BlackBerry
- Lenovo
- Evercoss
- Sony
- Mito
- Apple
- Nokia
- LG

Others: Huawei, OPPO, ZTE, Xiaomi

Mobile Platform (OS) Market Share (%)



Source:

<http://www.buzzcity.com/l/reports/The-BuzzCity-Report-Vol-4-Issue-3.pdf>

<http://id.techinasia.com/blackberry-kini-nomor-tiga-di-indonesia-dikalahkan-bintang-baru-smartfren-andromax/>

<http://id.techinasia.com/pangsa-pasar-terbesar-android-os-paling-rentan-grafik/>

- Local brands are very aggressive in marketing. Evercoss was the sponsor of the most watched TV program, X-Factor Indonesia and Indonesian Idol.
- Maxtron, Cyrus, S-Nexian, Tiphone, Polytron can be seen in many billboards in the country.
- These local brands cooperate with telcos to do data plan bundling.
- Evercoss ships 16 million phones annually and has 40 models in the market.
- Smartfren Andromax phones can only be used for Smartfren network, thus its sales helps with Smartfren's user acquisition.
- Baidu Browser is preinstalled in Maxtron (not as default browser) and Andromax (as default browser) phones, but uninstallable.

Top Local Mobile Brands in Indonesia

- Evercoss
- Smartfren
- Mito
- Advan

Significant local players: Maxtron, S-Nexian, Advan, Tiphone, Cyrus, IMO, Polytron, Ivo, CSL Blueberry, Tabulet.

Source: <http://www.techinasia.com/evercoss-indonesias-biggest-local-handset-manufacturers/>

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Type	Company
E-commerce	Lazada/Zalora/Foodpanda/Lamido
	Blibli.com
Group buying	Disdus.com
	Dealkeren.com
Online Travel	Traveloka.com
	Tiket.com
Ticketing e-commerce	Rajakarcis.com
Matrimony Portals	Bridestory.com
	Weddingku.com
Online Games	GameQQ.net
	Kotakgame.com
Online Music	Melon.co.id
	Langitmusik.com
Online News	Detik.com

Data from Opera

Top 10 Mobile Websites in Indonesia

No.	Mobile Website
1	Google
2	Facebook
3	Blogspot
4	Wordpress
5	Youtube
6	Detik
7	Yahoo
8	Twitter
9	Wikipedia
10	4shared

Top 10 Android devices in Indonesia

1. Samsung Galaxy Y (GT-S5360)
2. Samsung Galaxy Mini (GT-S5570)
3. Samsung Galaxy Tab 2 (GT-P3100)
4. Smartfren Andromax (Android AD683G)
5. Samsung Galaxy Y Duos (GT-S6102)
6. Samsung Galaxy Chat (GT-B5330)
7. Samsung Galaxy Pocket (GT-S5300)
8. Samsung Galaxy W (GT-I8150)
9. Samsung Galaxy Ace (GT-S5830)
10. Samsung Galaxy Mini 2 (GT-S6500D)

Unlimited Browsing with Opera Mini



The screenshot displays the Opera Mini application interface. At the top, there's a header with the 'Opera Mini' logo and a 'TELKOMSEL' logo. Below this, a row of colorful icons represents various services: Google, Facebook, WhatsApp, LINE, Viber, and others. The main content area features promotional text in Indonesian, highlighting the benefits of using Opera Mini for unlimited browsing. It mentions that users can access various services without additional charges. At the bottom, there's a section titled 'Paket Internet Opera Mini Indosat (Jombang, Mantari)' which lists the details of a specific internet package offered by Indosat, including its duration and data allowance.

Source:

<http://www.techinasia.com/keynote-state-indonesias-mobile-landscape/>

Data from Opera (Jan 2011 & Sep 2011)

Page-view growth since January 2010: 29.2 %
Unique-user growth since January 2010: 49.2 %
Data transfer growth since January 2010: 55.7 %
Page views per user: 593
Data transferred per user (MB): 6
Data transferred per page view (KB): 10

Top 10 sites in Indonesia (unique users)

facebook.com
google.com
detik.com
youtube.com
twitter.com (6)
wapdam.com (5)
yahoo.com
wikipedia.org
kaskus.us (back on the list)
4shared.com (new)

Top handsets for January 2011

Nokia 5130 XpressMusic
Nokia C3
Nokia 2700c
Nokia E63
Nokia 2330c
Nokia 6300
Nokia N70
Nokia 2730c
Nokia 3120c
Nokia 5310 XpressMu

Page-view growth since September 2010: -4.5 %
Unique-user growth since September 2010: 21 %
Data transfer growth since September 2010: 3.4 %
Page views per user: 528
Data transferred per user (MB): 5
Data transferred per page view (KB): 10

Top 10 sites in Indonesia (unique users)

facebook.com
google.com
youtube.com
detik.com
yahoo.com (6)
wikipedia.org (9)
waptrick.com
4shared.com
my.opera.com (10)
kaskus.us (back on the list)

Top handsets for September 2011

Nokia 5130 XpressMusic
Nokia X2
Nokia C3
Nokia E63
Nokia 2330c
Nokia 6300
Nokia 2700c
Nokia N70
Nokia 2730c
Nokia 3120c

Source:

<http://www.operasoftware.com/archive/smw/2011/09/>

<http://www.operasoftware.com/archive/smw/2011/01/>

- Legislators passed UU ITE which is supposed to protect people and businesses from malicious Internet activities (such as DoS, hacking, sniffing, etc.)
- With UU ITE, criminal acts over the Internet can be prosecuted and if convicted will result in jail time.
- Ministry of ICT deployed TrustPositif initiative to block illegal sites (porn, gambling, etc.)
- Some sites like Vimeo, which allow nudity video, Imgur, and Reddit are blocked.
- TrustPositif only blocks (and forces redirect) DNS requests, thus this blocking method can easily be circumvented as seen in UC Browser.
- Internet users can face libel suits and even criminal prosecution for comments posted by other users on their websites. In the case of politician Misbakhun, the Twitter user who accused him of being a corruptor on Twitter got jail time. Misbakhun was previously convicted but overturned by higher court.

Source:

<http://news.okezone.com/read/2014/02/05/339/936399/fitnah-misbakhun-di-twitter-benhan-divonis-6-bulan-penjara>

<http://www.techinasia.com/online-porn-crackdown-vimeo-reddit-imgur-blocked-indonesia/>

- Vserv.mobi states that almost 30% of e-commerce traffic in Asia Pacific come from smartphones and tablets.
- Indonesian e-commerce website, lojai.com, recorded almost 20% of their sales come from mobile on May 2014.
- Tokobagus/OLX recorded 800% growth on their Android app in 2013.
- Rakuten managed to grow 438% on mobile during Apr-Dec 2012.
- There are still plenty of BBM Group “online shops” especially for fashion and apparels, in addition to Instagram and Facebook “shops” (F-commerce).

Source:

<http://inet.detik.com/read/2014/04/22/082250/2561457/319/geliat-e-commerce-lewat-ponsel--tablet>

<http://lifestyle.bisnis.com/read/20140526/106/230915/transaksi-online-pengguna-mobile-commerce-terus-meningkat->

<http://inet.detik.com/read/2013/03/12/092442/2191985/319/pengguna-aplikasi-android-tokobagus-naik-800>

<http://tekno.kompas.com/read/2013/02/13/22332752/bisnis.e-commerce.melesat.kencang>

- E-commerce with mobile apps:
 - OLX (1M-5M GP, #41 AS)
 - Tokopedia (100K-500K GP)
 - Berniaga.com (1M-5M GP)
 - Zalora (1M-5M GP, #169 AS)
 - Lazada (1M-5M GP, #70 AS)
 - Blibli (50K-100K GP)
 - Bukalapak.com (50K-100K GP)
 - Elevenia (100K-500K GP, #193 AS)
 - Bhinneka (100K-500K GP)
 - Traveloka (100K-500K GP, #50 AS)
 - Tiket.com (50K-100K GP, #155 AS)
- Price comparison websites:
 - PriceArea (100-500)
 - Telunjuk (5000-10000)
 - Pricelist (1000-5000)

- Ads industry estimates in Indonesia annually: (2011) \$5 billion, (2012) \$7 billion. 20% YoY growth.
- Ads media breakdown: TV accounts for 64% total ads expenses, 33% on newspaper, and 3% on magazines-tabloids.
- On average, Indonesian users consume 5 hours of media content. Mobile devices account for 36% of this, 106 minutes. Data from 2012.
- Customer decision influencer: mobile devices (55%), TV (49%), desktop PC (39%).
- In 2013 according to XL, mobile ads industry in Indonesia is worth \$9.5 million. XL owned 25% of the mobile ads industry, at \$2.3 million. 12.5% of XL's mobile ads came from LBS ads.
- Mobile ads are expected to account for 5 to 10% of total ads industry in 2015.
- Currently intrusive ads (interstitial and offdeck ads) are the most popular form of mobile ads in Indonesia and have sparked controversy in the society.

Source:

<http://inet.detik.com/read/2012/08/11/100556/1988959/328/3/relakah-ponsel-anda-dibanjiri-sms-iklan>

<http://inet.detik.com/read/2012/12/06/090313/2110752/398/indonesia-pasar-iklan-mobile-terbesar-ketiga-di-dunia>

<http://tekno.kompas.com/read/2013/05/03/1538144/3.operator.seluler.bersatu.demi.iklan.mobile>

<http://inet.detik.com/read/2014/05/20/165432/2587450/328/xl-tak-puas-cuma-kebagian-25-kue-iklan-di-ponsel>

<http://bisniskeuangan.kompas.com/read/2014/09/11/112456026/Soal.Iklan.Peralihan.Telkomsel.dan.XL.Axiata.Akan.Patuhi.Aturan>

- Global Ads Networks:
 - Google AdMob
 - Vserv.mobi
 - InMobi
 - BuzzCity
 - LINE
 - Adways
 - Nexage
 - Mobgold
 - Komli Mobile
 - MobPartner
 - Innity
 - Appia
 - Tapjoy
 - Flurry
- Local Ads Networks:
 - LBS ad services from telcos
 - AdStars
 - AdPlus
 - Kliksaya

- Indonesia is a Google Play-dominated market, other 3rd party app stores have little to no impact in the market
- Oomph (Smartfren App Store, Polytron App Store, & ADVAN App Store)
- NEO Apps World (MiTO phones)
- appmarket.co.id (iPhone phones)
- Mobogenie (Changyou) – 400K MAU, 20% growth MoM
- Mobo Market (Baidu)
- GudangApp (XL-Huawei)
- TemanDev (Telkomsel)
- Samsung, LG, Huawei, ZTE
- Appota
- AppTOKO
- Archos Appslib
- 1mobile
- Nexian's S-apps (<http://sapps.iguanasms.com/>)
- Cyrus (<http://www.cyrusaplikasi.com/>)
- SpeedUp Studio

Source:

<http://tekno.liputan6.com/read/2061048/ekspansi-indonesia-toko-aplikasi-mobogenie-suguhkan-konten-lokal>

- Mobile content providers (CP) used to supply MIDP games. There are only a few mobile CPs left that focus on downloadable mobile content.
- Most games are downloaded through Google Play.
- Popular games:
 - LINE Games (Let's Get Rich, PokoPoko, STAGE, etc.) (rough estimate: \$300K per month on games*)
 - King.com (Candy Crush Saga, Farm Heroes Saga, etc.)
 - Supercell (Clash of Clans, Hay Day, Boom Beach, etc.)
 - Boyaa Texas Poker (last time it generated \$120K monthly on Telkomsel alone)
 - Coalaa Texas Poker (about half of Boyaa's monthly revenue on Telkomsel)
 - Subway Surfers
 - Diner Dash
 - Gameloft games
- No local game publishers/developers managed to publish popular mobile games in Indonesia. Some active ones: Winner, Alegrium, NightSpade, Toge Productions, etc.
- Faunia Paw (developed by Artoncode and published by Lyto Mobi) has 19000 MAU.

*Formula: $170\text{M active} / 560\text{M registered} = 30.4\%$ active user rate, $30\text{M registered ID user} * 30.4\% = 9.1\text{M active ID user}$, $9.1 / 170 = 5.4\%$ active ID user as percentage, $\$95\text{M} * 20\%$ revenue from outside Japan = $\$19\text{M}$ revenue outside Japan, $5.4\% * \$19\text{M} = \1M per 3mths revenue from ID, $\$1\text{M} / 3 \text{ months} = \300K monthly revenue from ID.

Source: Google Play & appannie.com

<http://www.businessinsider.com/line-is-not-just-about-sticker-revenue-2013-12>

<http://www.techinasia.com/line-japanese-messaging-app-has-170-million-monthly-active-users/>

<http://techcrunch.com/2013/05/09/line-reports-q1-2013-earnings-of-58-9m-half-from-game-in-app-purchases-30-from-stickers-80-from-japan/>

<https://www.techinasia.com/indonesian-tv-company-move-games-invests-gaming-startup-artoncode/>

- Music industry has long stopped major marketing campaigns on music due to deteriorating sales of cassettes/CDs and increasing adoption of MP3 in phones.
- Music industry has been relatively quiet since the Black October incident in Indonesia.
- The music industry is hit so bad, that it caused Aquarius (one of the oldest music labels in Indonesia) had to close its long standing music stores in Jakarta.
- Disc Tarra also downsized their shops at shopping malls. Disc Tarra owns the largest physical music distribution chain in Indonesia.
- Various local music apps have struggled to bring profitable business, including industry heavyweights like Telkom's MelOn and Telkomsel's Langitmusik. MusikLegal (by GenID) also failed to grow the market, despite GenID being the official digital repository for most music labels in Indonesia.
- Smartfren claims that Indonesian digital music industry is worth \$60 million for the last 12 months (2014).

Source:

<http://inet.detik.com/read/2014/06/20/184601/2614723/328/bisnis-musik-digital-di-indonesia-tembus-rp-720-miliar>
<http://inet.detik.com/read/2014/06/28/121844/2621992/328/1/andromax-semakin-kaya-konten-cepat-aman>
<http://celebrity.okezone.com/read/2013/12/31/386/920058/industri-musik-indonesia-makin-terpuruk>

- Smartfren preloads Gudang Musik into Smartfren Andromax phones, in cooperation with MelOn. Gudang Musik offers 1 million songs from 87 music labels, 8 of them are global labels.
- Telkom's MelOn finally made annual net profit of \$400K in 2014, after years of losses. MelOn made \$600K net loss the year before.
- In addition to the telcos' music businesses, currently Apple's iTunes contributes to digital income of the music label companies.
- Preloaded music stores on local Android phones have limited success.
- Most radio stations have online streaming these days to appeal to broader audience, because radio stations operate locally.
- Malaysia contributes to sales of original CDs of Indonesian music.
- Nagaswara, one of Indonesia's top music label with hundreds of artists under their management, earns \$100K monthly from Malaysia.
- Malaysians also buy Indonesian music through iTunes due to better penetration of credit cards in Malaysia.

Source:

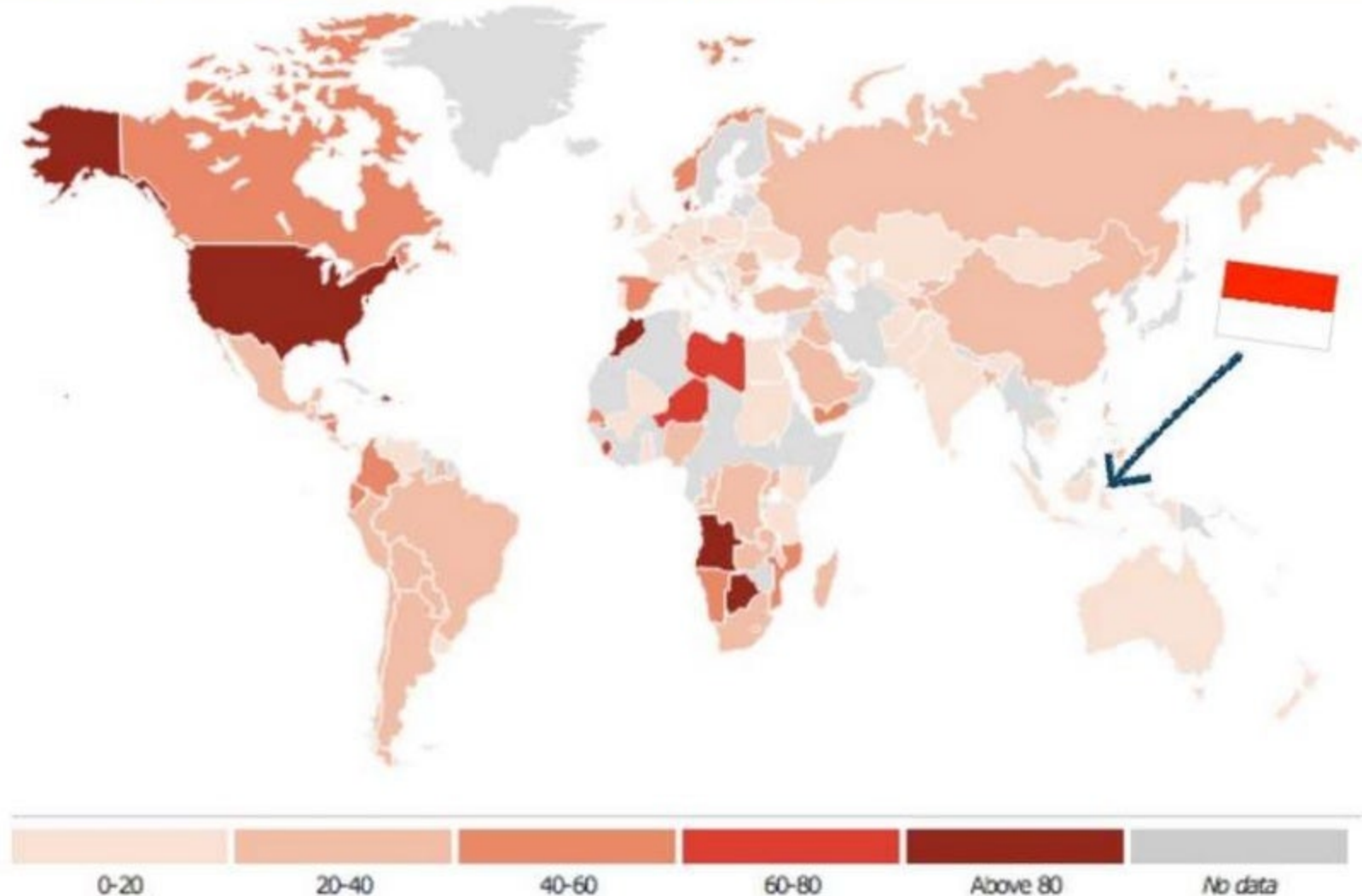
<http://inet.detik.com/read/2014/08/02/120430/2651528/328/telkom-akhirnya-cicipi-manisnya-melon>

<http://celebrity.okezone.com/read/2013/08/04/386/847524/malaysia-penyelamat-musik-indonesia/large>

- Baidu Browser
- DU Battery Saver
- DU Speed Booster
- NQ Mobile Security
- Opera Mini
- BBM
- Facebook
- Twitter

- 1 Country profile
- 2 Mobile Internet ecosystem
- 3 Mobile Internet business model**
- 4 Investment enrolled on Internet

Indonesia's data plan is now one of the cheapest in the world. Thanks to the government-backed efforts to force operators to reduce their tariffs and massive success of BlackBerry in 2008-2012.



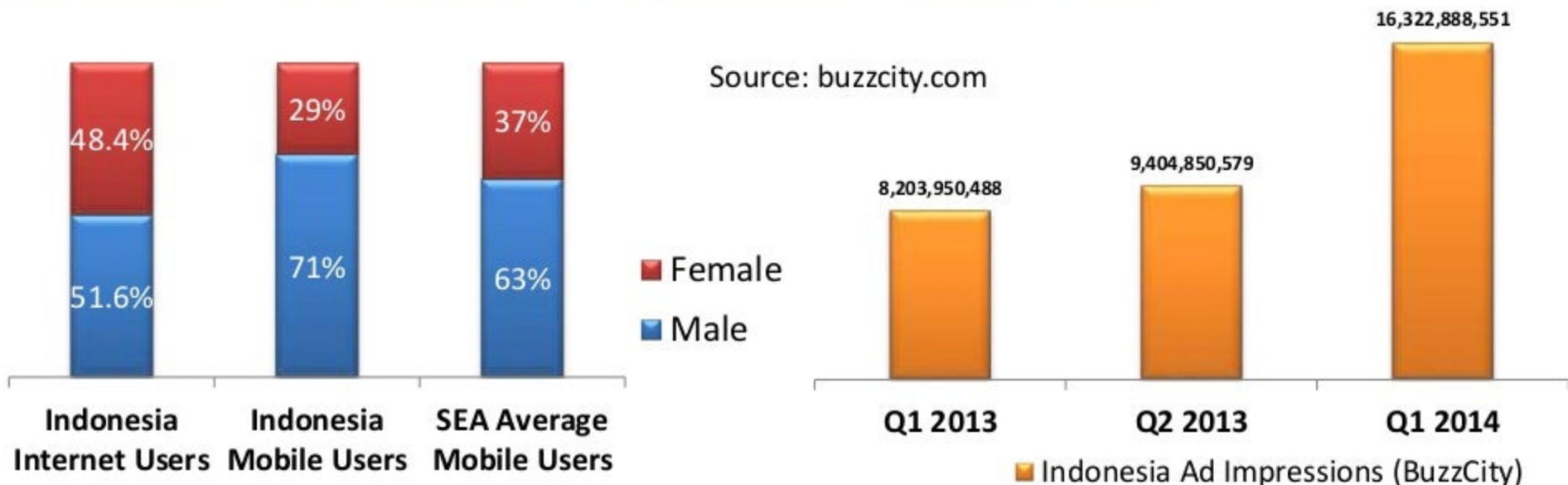
Pre-paid handset-based subscription with 500mb of data per month: based on US\$ at Purchasing Power Parity
Source: ITU (2012), Andriodcentral.com (2013)

Mobile Internet Growth (1)

- 62% of Internet users access through mobile, and less than 10% of them have Internet access at home.
- 92% of Internet users in Indonesia own a Facebook account.
- Almost 90% of the Indonesian Facebook users access it through mobile.
- Aside from TV, Internet has become the main source of information, ahead of newspapers. 60% of Internet users already rely on the Internet to find information.
- According to InMobi, Indonesia made 200 billion mobile ads impression in 2012, 2nd largest market after US for mobile ads.
- BuzzCity, a global mobile ads agency, records significant increase in ad impressions in Indonesia for 2014.

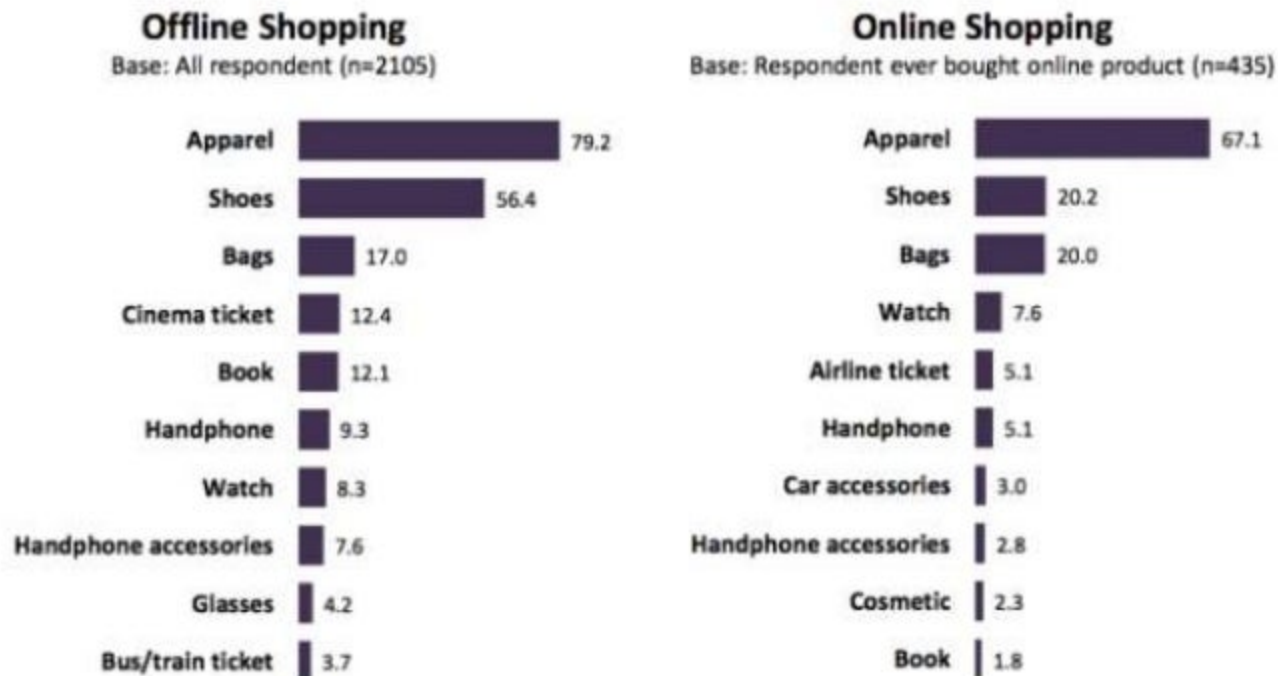
Source:

<http://id.techinasia.com/laporan-mayoritas-masyarakat-indonesia-akses-internet-lewat-perangkat-mobile-slideshow/>
<http://tekno.kompas.com/read/2014/10/12/09393227/Pagi.Ini.Mark.Zuckerberg.Kunjungi.borobudur>



Mobile Internet Growth (2)

- Instant messaging is the primary method of communication for mobile phone users. 90% of them are using IM everyday and of which 60% use IM multiple times daily.
- On average, there are 4.2 IM applications installed on the mobile phone users' device, with WhatsApp, BlackBerry Messenger (BBM), and LINE are the top 3 IM installed. In September 2014, LINE reported to have 30 million users from Indonesia.
- E-commerce users prefer to shop online through conventional ecommerce sites (20%), social media (26%), IM group like BBM Group (27%), and forum and classifieds like Kaskus and OLX (27%).



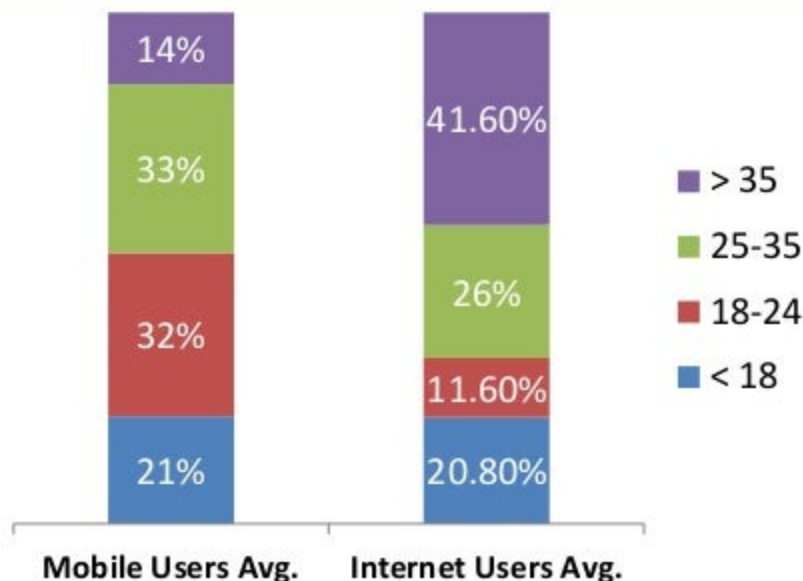
Source:

<http://id.techinasia.com/laporan-mayoritas-masyarakat-indonesia-akses-internet-lewat-perangkat-mobile-slideshow/>
<http://id.techinasia.com/tingkah-laku-pengguna-internet-indonesia/>
<http://www.techinasia.com/line-releases-regional-breakdowns-for-its-490m-registered-users/>

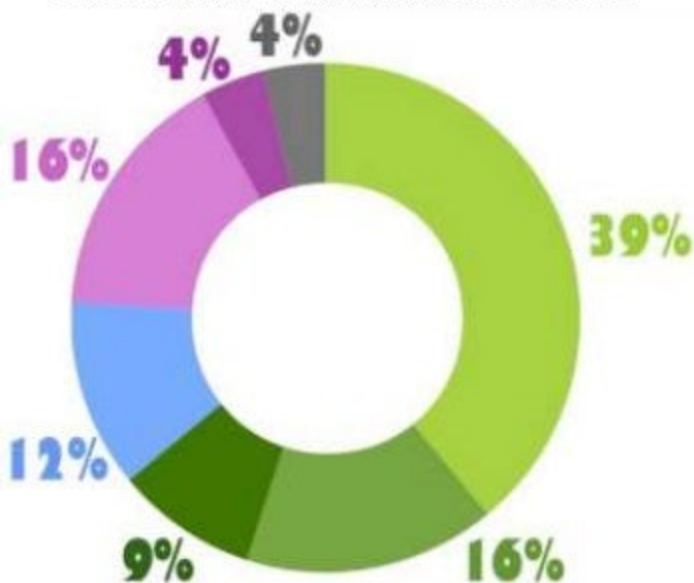
Mobile Internet Demographics and Trends

UC Web

Mobile Internet users demographics



Source: APJII, Profile Internet Indonesia, Desember 2012

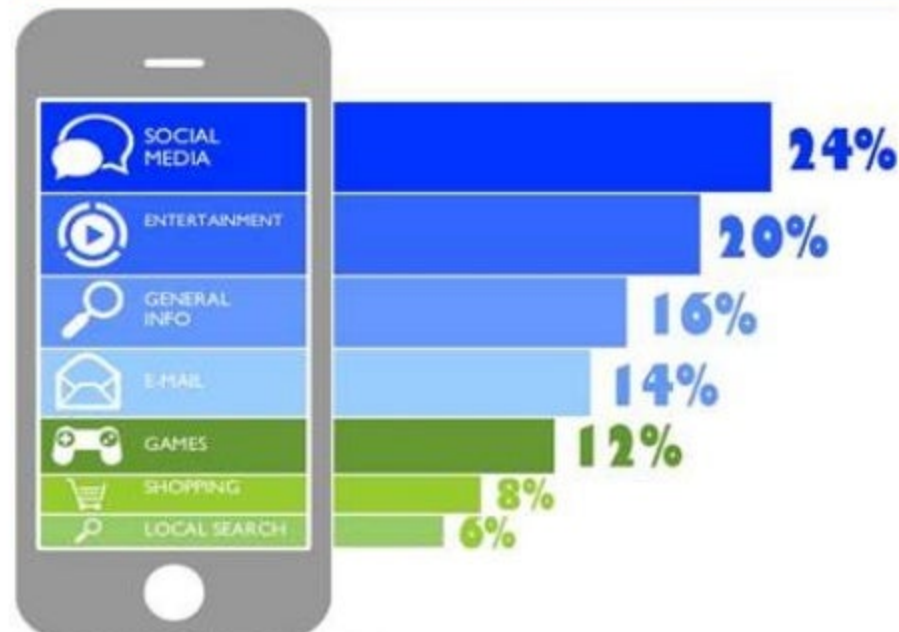


- FULL-TIME JOB
- BUSINESS
- ENTREPRENEUR
- PART-TIME JOB
- STUDENT
- HOUSEWIVES
- RETIRED

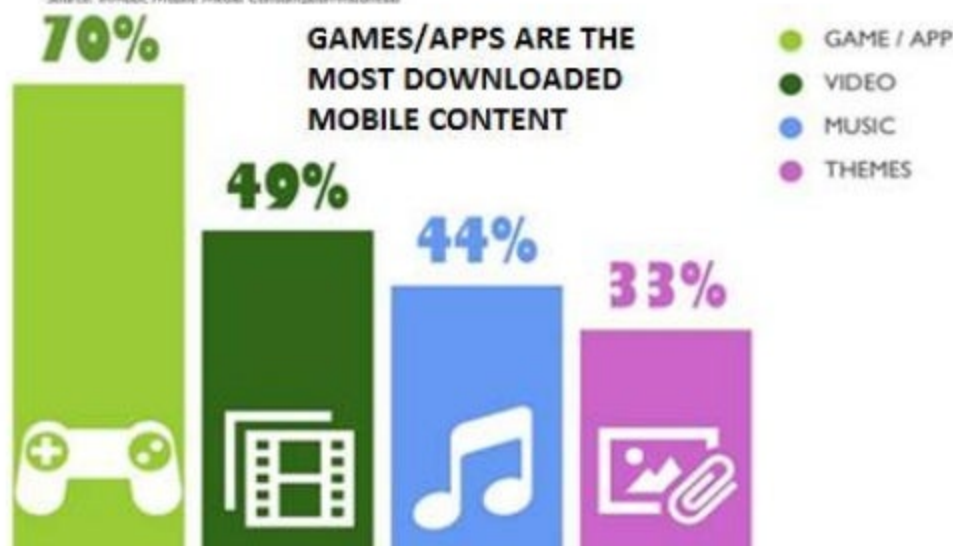
1/4TH OF MOBILE INTERNET USERS IN INDONESIA ARE BUSINESSMEN OR ENTREPRENEUR

Source: MMA & YSERV.mobi, The Mobile Internet Consumer Indonesia, 2013

What do people do on mobile Internet?

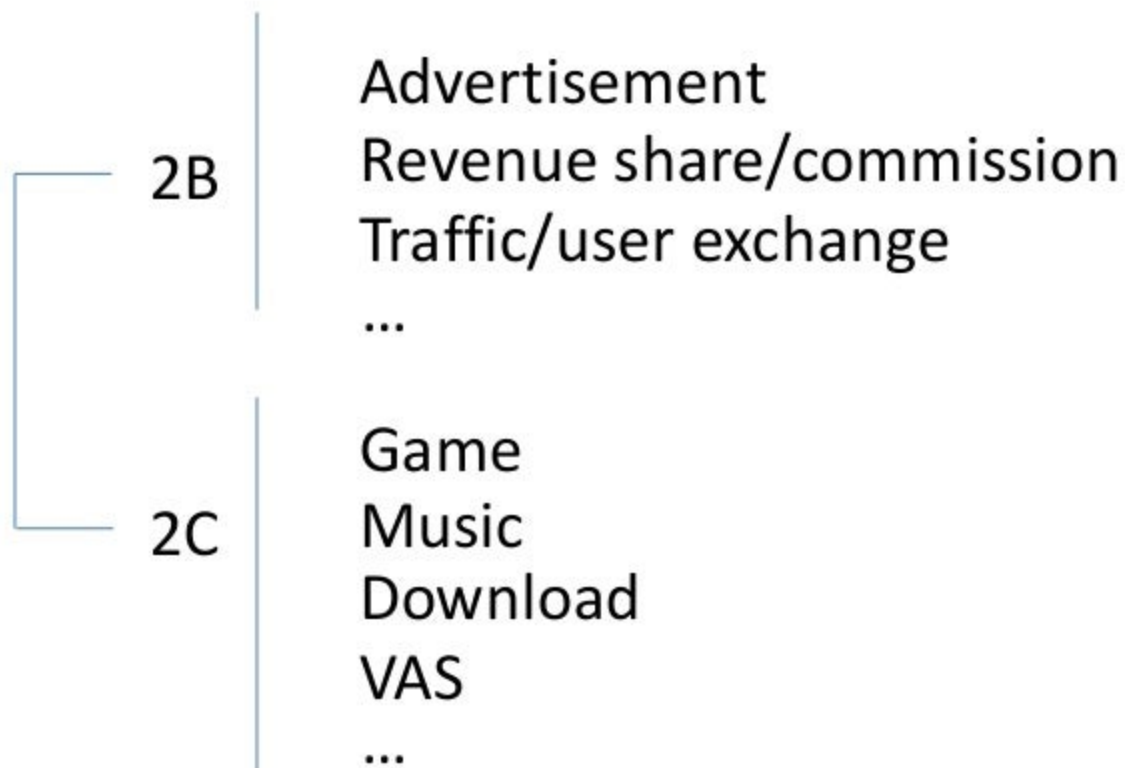


Source: InMobi, Mobile Media Consumption-Indonesia



Source: MMA & YSERV.mobi, The Mobile Internet Consumer Indonesia, 2013

What does revenue come from?



How do users pay for mobile ecommerce in Indonesia?

PSP Service	Description info:
Coda Payments	Coda Payments is one of the earlier PSP that provides carrier billing with AXIS. Indonesia is a predominantly prepaid market, carrier billing can be considered as airtime/balance deduction. AXIS users can easily key in their AXIS mobile phone no into at merchants cooperating with Coda and it will send an SMS asking to confirm. Upon confirmation, the user's airtime balance will be deducted and payment is completed.
Mimopay	Mimopay is the pioneer of accepting 3 rd party payments using telco's prepaid card (Smartfren's). Mimopay works with XL and Telkomsel for carrier billing. Similar to Coda, Mimopay also require users to key in their mobile phone no to confirm via SMS. For Smartfren prepaid reload cards, users can just key in the secret code into the merchants' website to claim the credits. Mimopay is the first PSP in Indonesia that deploys its own Android SDK to assist apps merchants in adopting Mimopay's various channels.
Mandiri e-cash	Mandiri e-cash is the latest product of Mandiri, the largest bank in Indonesia. Mandiri e-cash has UMB/USSD access menu on every telco (*141*6#) or an app for Android/iOS users. Mandiri e-cash enables people with no bank account to easily own a Mandiri e-cash account by using their mobile phone no as their account no. This is a common product for banks to have because of the huge amount of unbanked people in Indonesia.
BCA Klikpay	BCA Klikpay is BCA's answer to PayPal. BCA is the largest consumer bank in Indonesia, it has the largest no of ATMs and EDCs in the country. BCA Klikpay allows users to deduct their bank account balance directly. Most people own a BCA account in major cities across Indonesia, so this is a very convenient payment method.
Doku/Veritrans/ E2Pay/Indopay/ Finpay/IPayMu/ IPay88	Doku and IPayMu aim to be Indonesia's PayPal. While Veritrans, E2Pay, Indopay, Finpay, and IPay88 are credit cards payment processor. Doku has its own wallet and has the widest coverage of merchants. Major merchants utilize Doku Wallet and Doku as their credit cards payment processor.

- 1 Country profile
- 2 Mobile Internet ecosystem
- 3 Mobile Internet business model
- 4 Investment enrolled on Internet

Venture Capitals in Indonesia's Internet startups

Major Venture Capital in Indonesian Internet industry

VC	Target Fieldo	Portfolio
Rebright Partners	Internet, Consumer	Qraved, iMoney, IndoTrading, Adskom
CyberAgent Ventures	Internet, Media	Coda Payments, Bilna, TouchTen, VIP Plaza, Tokopedia
East Ventures	Internet, Media, Consumer	SCOOP, UrbanIndo, RedMart, Tokopedia, Bilna
GREE Ventures	Internet, Consumer	Bukalapak, Berrybenka, UrbanIndo, Luxola, PriceArea.
Ideosource	Internet, Consumer	Kark, Pasar Minggu, Saqina, Ever, Gimmie, Kelir TV, TouchTen
500 Startups	Internet, Consumer	Qraved, Bukalapak

Source: <http://www.techinasia.com/10-of-indonesia-most-active-venture-capital-firms/>

Several other major VCs are playing the space as well – Mountain SEA Ventures, Ideosource, Grupara, Fenox Venture Capital, IMJ Investment Partners.