

# E-Commerce sites in Indonesia 2014

Omnibus Popular Brand Index

Date: June 2014



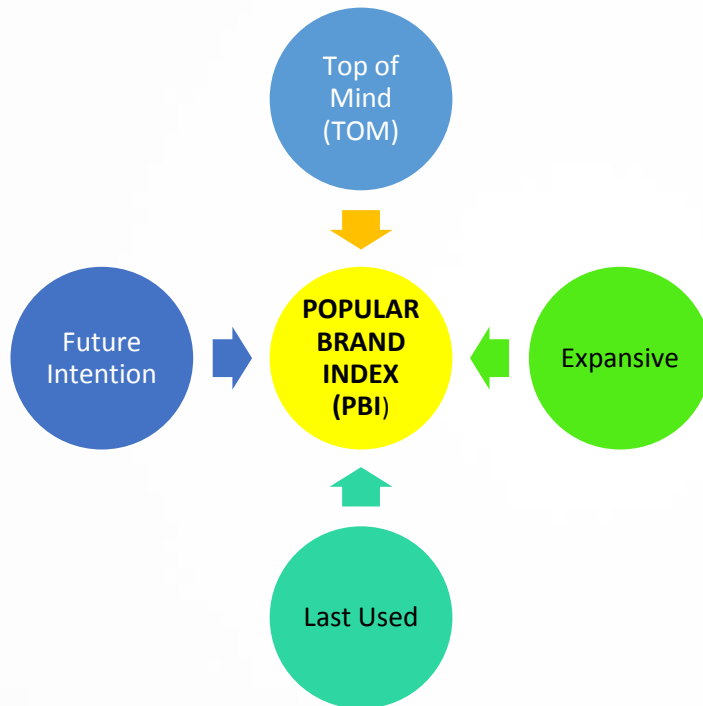
# A. Detail findings

## 1. Popular Brand Index

- 2. Brand awareness
- 3. Expansive
- 4. Last Used
- 5. Future Intention
- 6. Switching
- 7. General Information

# A. Detail findings

## 1.1. Popular Brand Index Concept



One of the most important Assets of the company and represent identity of a company is the Brand. "Brand or trademark is a name or symbol that is associated with the product/service and cause psychological meaning/association". In addition, the brand also as a promotional tools, so that a product with certain brand would likely gain popularity or awareness in the community level that will affect consumer behaviour in the community.

To determine organization performance we could see from development of the brand. W&S study based on development of PBI (Popular Brand Index) concept which included community top of mind brand, expansive or spread of the brand, total purchase or last used of the brand, and consumer intention to purchase brand.

$$PBI = w_1 \cdot TOM + w_2 \cdot Expansive + w_3 \cdot LastUsed + w_4 \cdot Intention$$

### **Additional Information :**

- Top of Mind (TOM) = First brand mentioned by respondents.
- Expansive = Scope and spread of brand.
- Last Used/ Market Share = Total purchase or last used brand in past 3 months.
- Future Intention = Consumer intention to purchase brand.

# A. Detail findings

## 1.2. Popular Brand Index Results (PBI)

PBI is obtained by the Internet sampling (Online Panel) and with samples of 864 respondents in the W & S database Indonesia (nusaresearch). The results obtained for E-Commerce Category with PBI concept is as follows:

Rank of Popular	E-Commerce	PBI	IR
1	<b>Lazada</b>	<b>29.2</b>	<b>47.0%</b>
2	OLX	22.1	
3	Berniaga	8.9	
4	FJB Kaskus	8.1	
5	Zalora	5.5	
6	Qoo10	3.8	
7	Tokopedia	3.6	
8	Rakuten	2.6	
9	Bhinneka	2.1	
10	Blibli	1.8	
11	Groupon Disdus	1.4	
12	elevenia	1.3	
13	Berrybenka	1.3	
14	Bukalapak	0.6	
15	Livingsocial	0.5	

**Lazada** is an E-commerce site popular in Indonesia with a score of 29.2, followed by OLX in second positioned with a score of 22.1

Incidence Rate e-commerce (visited to e-commerce websites in the last three months) is 47.0% from panel population W&S Group Indonesia.

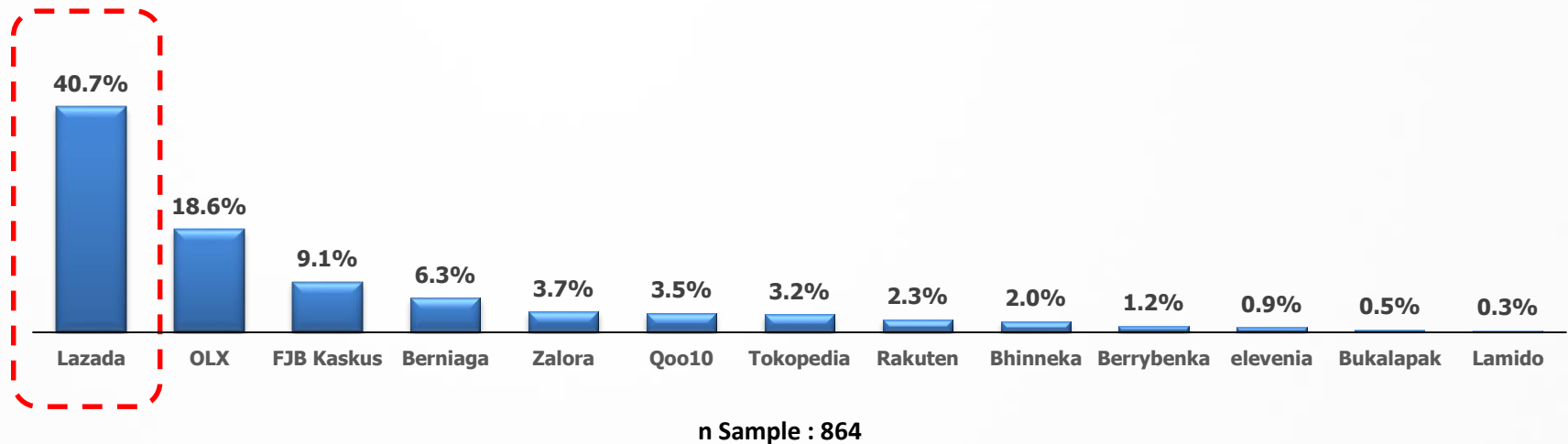
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## 2.1. Brand Awareness – Top Of Mind

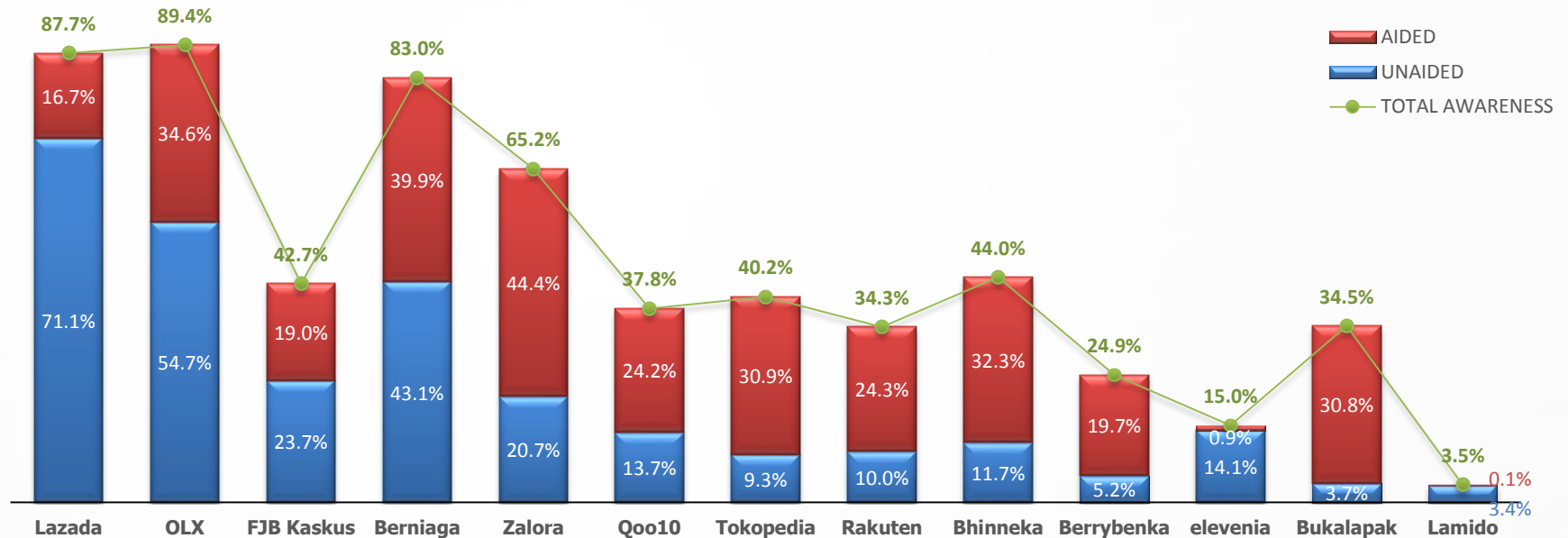
To see the power of e-commerce sites, can be measured by the level of knowledge of respondents to the site. From the results of the Top of Mind (TOM) or sites that remembered the first time and that brand comes to mind with spontaneously when speaking in the context of e-commerce are Lazada (40.7%) followed by the OLX (18.6%). It means, Lazada and OLX sites are an e-commerce sites that is very popular in Indonesia.



# A. Detail findings

## 2.2. Brand Awareness

When looking unaided sites or e-commerce that spontaneously comes to mind of the respondent, apparently Lazada (71.1%) and OLX (54.7%) still dominate. However, when viewed from the aided or sites that respondents remembered after being given assistance (Showcard), Zalora (44.4%) and Berniaga (39.9%) were classified into the sites most often remembered by the respondents.



n Sample : 864

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# A. Detail findings

## 3. Expansive

1. OLX, 33.0%

2. Lazada, 27.7%

3. Berniaga, 10.8%

4. FJB Kaskus, 7.1%

5. Zalora, 6.5%

6. Qoo10, 2.0%

7. Rakuten, 1.9%

8. Tokopedia, 1.9%

9. Groupon Disdus, 1.6%

10. Blibli, 1.3%

Expansive is the spread of sites that can be seen anywhere. In this study, OLX (33.0%) and Lazada (27.0%) was the most often visible website in different places or in other words, OLX and Lazada may have many ads on TV, billboards, internet ads, etc.. Some cases are found, Lazada and OLX very aggressive in social media.



n Sample : 864

# A. Detail findings

## 4. Last Used

1. Lazada, 23.7%

2. OLX, 21.4%

3. Berniaga, 9.3%

4. FJB Kaskus, 9.1%

5. Qoo10, 6.1%

6. Zalora, 5.1%

7. Tokopedia, 4.1%

8. Rakuten, 3.7%

9. Bhinneka, 2.0%

10. elevenia, 1.2%

Last Used/Frequent used is measured from the level of the respondents percentage who visited the e-commerce sites in the last 3 months.

Also seen, Lazada (23.7%) and OLX (21.4%) are e-commerce sites that most visited in the last three months (March ~ May 2014). This is one of the positive impact caused by the awareness domination level.



n Sample : 864

# A. Detail findings

## 5. Future Intention

1. Lazada, 21.9%

2. OLX, 18.1%

3. Berniaga, 10.2%

4. Zalora, 7.3%

5. FJB Kaskus, 6.5%

6. Tokopedia, 5.1%

7. Blibli, 3.9%

8. Qoo10, 3.5%

9. Bhinneka, 3.1%

10. Rakuten, 2.4%



n Sample : 864

Future Intention measured by the percentage of respondents to the e-commerce sites which will be visited in the future. Future intention percentage is measured by the Loyal respondents and Switched respondents.

In this study, Lazada (21.9%) and OLX (18.1%) are e-commerce sites that most interesting and have a big opportunity to be visited again.

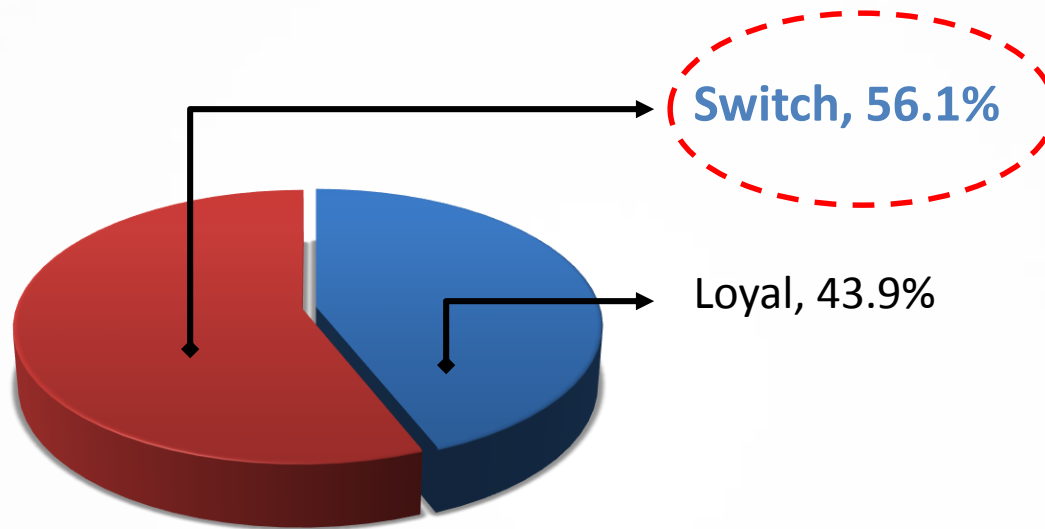


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## 6. Switching

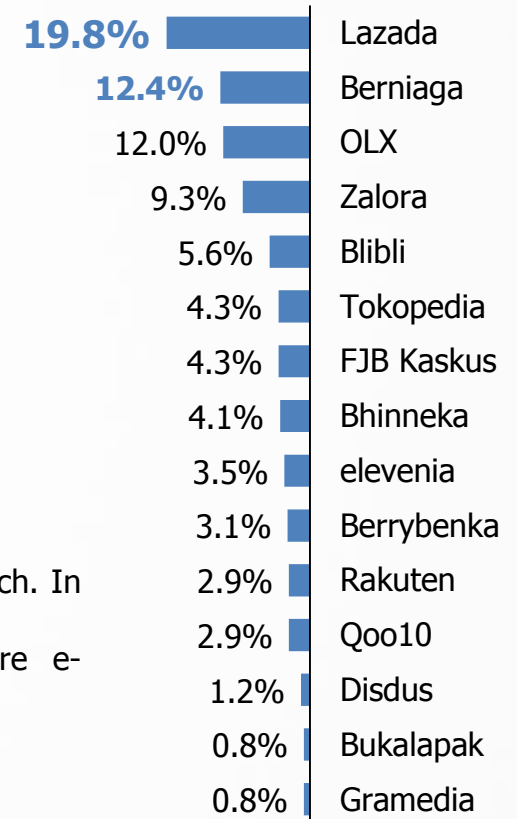


From this research, apparently there are 56.1% of the 864 samples will switch. In simple terms, current sites and future sites that will be visited are different.

From switched respondents, Lazada (19.8%) and Berniaga (12.4%) are e-commerce sites that they will use in the future.

n Sample : 864

## Future E-commerce sites



n Sample : 458

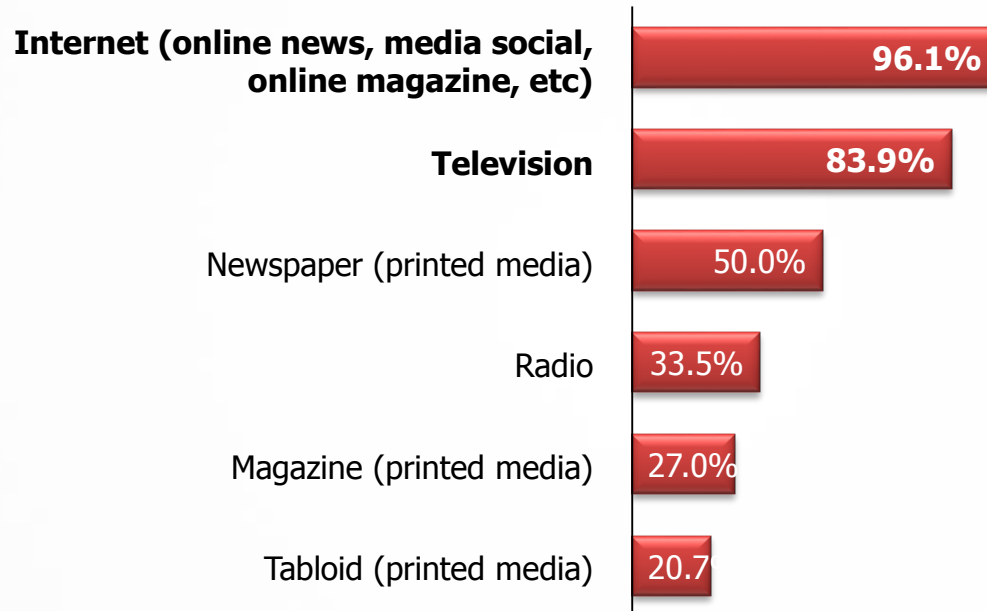
\* Relative to respondents who will switch

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# A. Detail findings

## 7.1. Media were routinely used at last 3 months



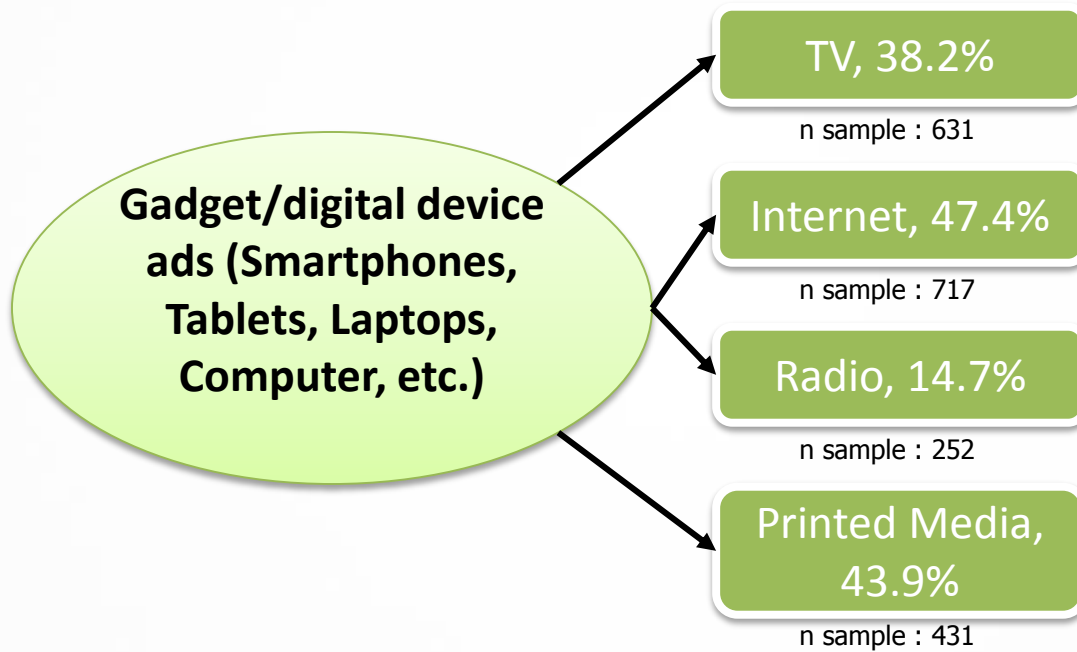
From 752 surveyed respondents, 96.1% of respondents routinely use the Internet. Followed by television (83.9%). For printed media, newspapers (50.0%) is the most frequently read by respondents.

n Sample : 752



# A. Detail findings

## 7.2. Interesting Ads for each media



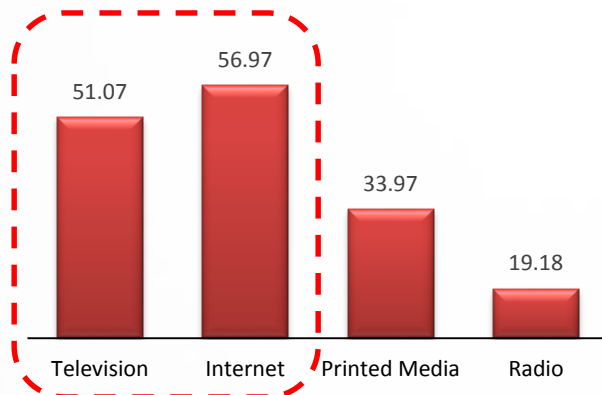
Currently, Gadgets / digital devices are very popular in the society. Seen from the overall media, ads the most interesting by respondents is **Gadget ads/ digital devices ads.**

# A. Detail findings

## 7.3. Advertising Effects in influencing use of product decision

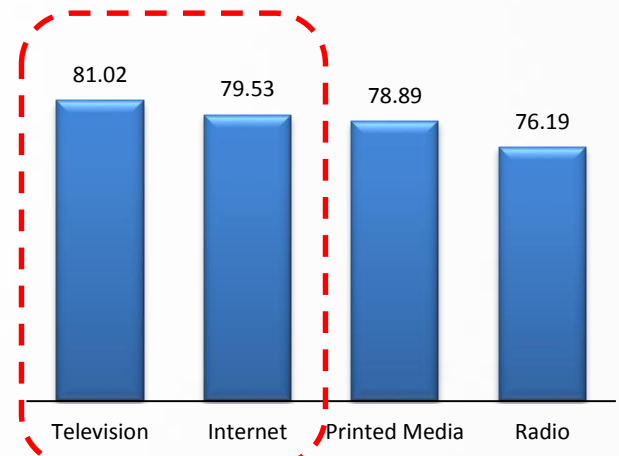
Advertising is an important point which gives a significant effect. The quality of a product is not necessarily major factor to be selected by society. Advertisements are made to change the public perception. But, advertisement and very good product, not necessarily be known by the public. To that end, industry or company needs advertising placement information. From the research, apparently Internet advertising (Score 56.97) and television commercials (score 51.07) gives a very big influence in affecting respondent decisions. So it is advisable for the industry or company placing advertisements in the media.

**Ads Effectiveness = Mean Score Ads \* IR Media**



*Ads Effectiveness*

- Using scale 0.00 – 100.00 if ads effectiveness score was higher then it would affect to the community more higher. Considering the audience of the advertisement, printed media maybe effective if in terms to persuade audience to make decision to buy the product. But eventually there is only a small people now that read printed media comparing to television watcher so we assume that television and internet are more effective than printed media.



*Ads Mean Score Impact*

Mean Score using scale 0.00 – 100.00, which:

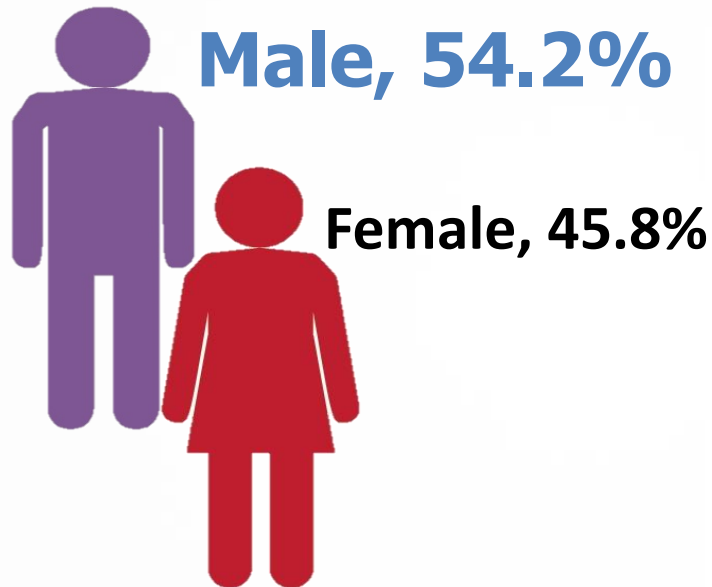
0.00 - 24.90 : Very small effect	62.50 - 74.90 : Quite influential
25.00 - 49.90 : Small effect	75.00 - 87.50 : Big influential
50.00 - 62.50 : Neutral	87.50 - 100.00 : Very large influential

## B. Respondent profile

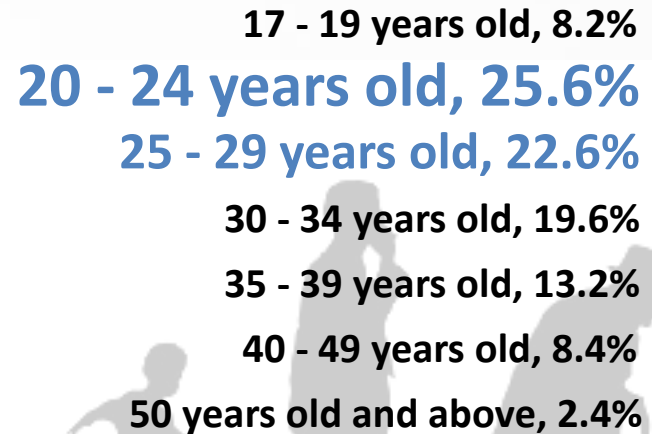
# Respondent Demography

## B. Respondent profile

### Gender



### Age



n Sample : 864

## B. Respondent profile

### Monthly Household Income

■ Less than IDR 1,500,000	6.5%
■ IDR 1,500,001 - IDR 2,500,000	14.8%
■ IDR 2,500,001 - IDR 3,500,000	14.9%
■ IDR 3,500,001 - IDR 4,500,000	13.3%
■ <b>IDR 4,500,001 - IDR 6,500,000</b>	<b>  16.7%</b>
■ IDR 6,500,001 - IDR 8,500,000	8.1%
■ IDR 8,500,001 - IDR 11,000,000	10.2%
■ IDR 11,000,001 - IDR 20,000,000	8.8%
■ IDR 20,000,001 - IDR 30,000,000	3.2%
■ IDR 30,000,001 - IDR 40,000,000	1.7%
■ Over IDR 40,000,000	1.7%

n Sample : 864



## B. Respondent profile

### Province

### City



n Sample : 864



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**FOR FURTHER INQUIRIES, PLEASE CONTACT:**

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