



PLANNING YOUR MEDIA STRATEGY FOR RAMADAN 2023

**M&C
SAATCHI
PERFORMANCE**

RAMADAN



2023

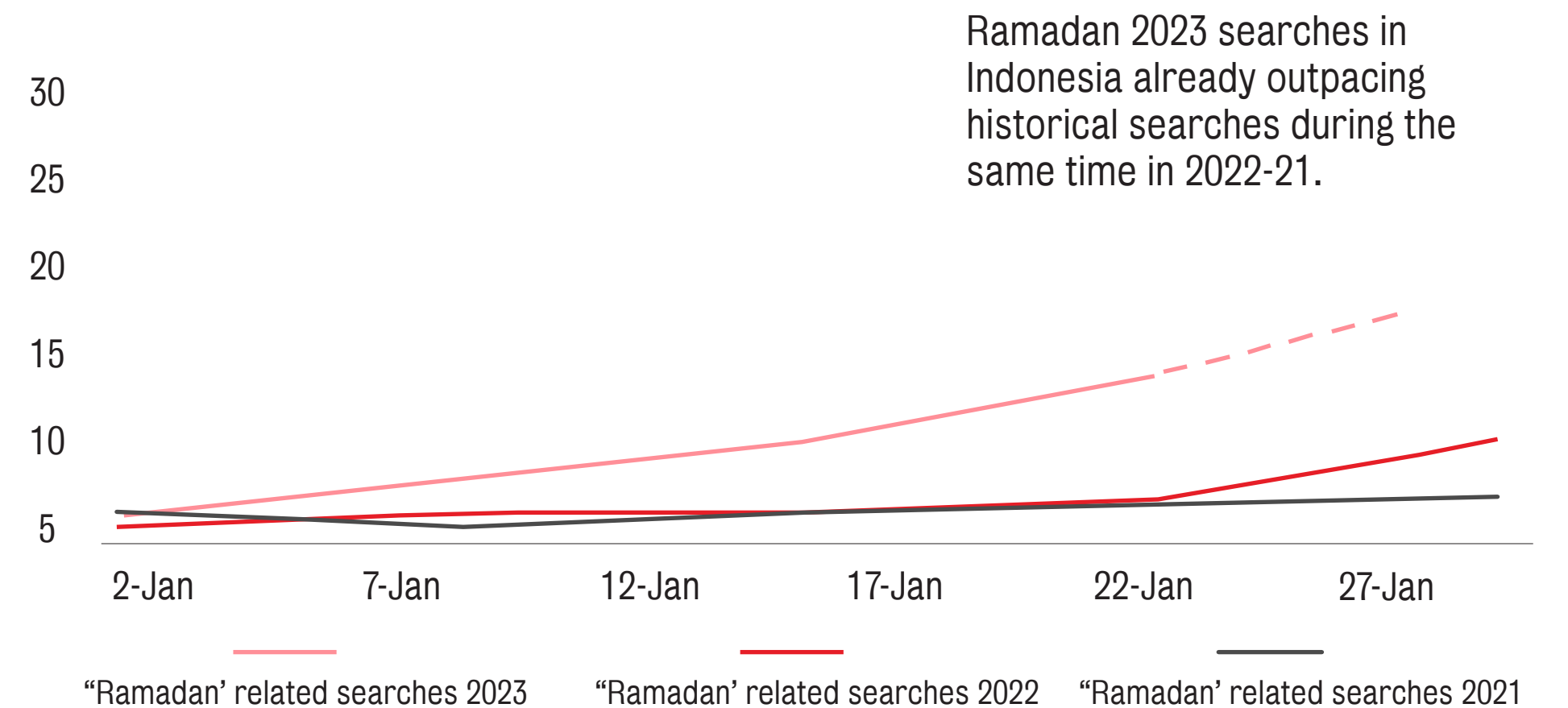
A RETURN TO TOGETHERNESS AND SHARING

After a challenging few years, having missed out on larger gatherings due to Covid norms, 2023 is bound to bring back spirited, passionate celebrations as restrictions continue to ease, and life reverts back to pre-Covid normalcy in Indonesia.

2023 IS BOUND TO BRING BACK SPIRITED, PASSIONATE CELEBRATIONS

Search trends indicate that searches for Ramadan-related keywords which historically have noted an uptick 1-2 months before Ramadan begins, have already begun to gain traction in January 2023 alone, showcasing that celebrations are on a head start this year.

GOOGLE TREND SEARCH POPULARITY FOR "RAMADAN" (JAN'23 V JAN'22 V JAN'21) (INDEX:100)



OUTDOOR MOBILITY IN INDONESIA IS RISING

Outdoor mobility in the region has been rising and recovering, which strongly suggests that consumers are easing back to usual outdoor activities and routines.

RETAIL & RECREATION



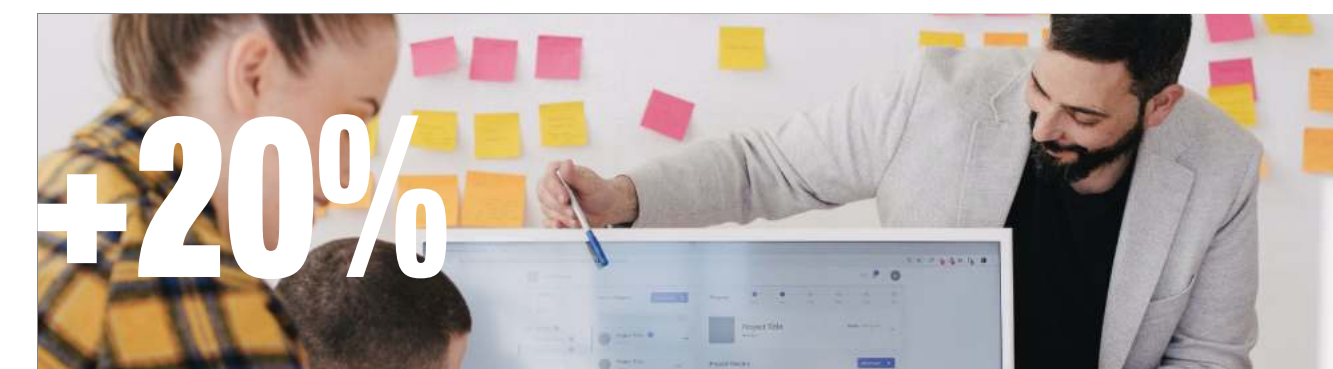
PARKS



GROCERY & PHARMACY



WORKPLACE



THE SOUGHT AFTER SHOPPING WINDOW WILL ONLY GROW BIGGER THIS YEAR

Ramadan is one of the biggest shopping windows of the year in Indonesia.

In 2021 and 2022, despite uncertainties linked to the pandemic, consumer spending was between

8-9% HIGHER

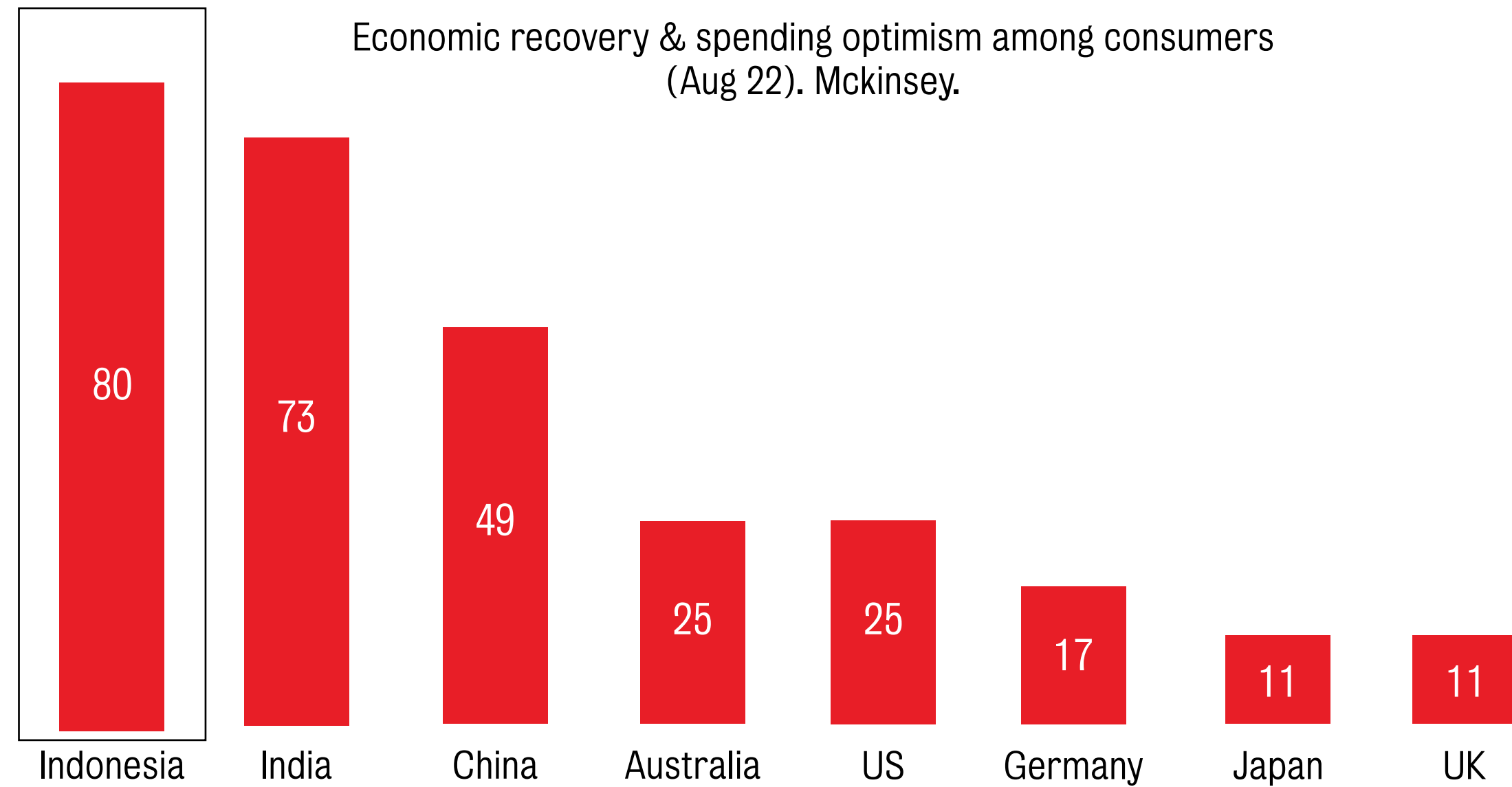
than other times of the year.

In 2023, we expect this to only grow further due to a nationwide return to normalcy and boosted shopping fervour which was further reinforced by the December 22 Harbolnas retail sales which broke records by clocking in

22.7 IDR TN

up 26% from December 21.*

*Source: [Gizmologi.ID: Blog, 2023](#)



From a marketers POV, in this context, with brands fearing economic headwinds, but consumers being highly optimistic, **it is important for marketers to maintain their advertising spends.**

It is proven how brands decreasing or eliminating spend during a recession, risked losing 15% of their revenue as compared with competitors that doubled their spend over the same period. Brands that increased media investment enjoyed a **17% growth** in incremental sales.

DESPITE A GLOBAL RECESSION LOOMING WHICH COULD POTENTIALLY BE A HEADWIND IN 2023, INDONESIANS REMAIN RESILIENT AS EVER, WITH 80% OF THE POPULATION REMAINING OPTIMISTIC ON SPENDING AND EXPECTING HIGHER INCOMES AND SAVINGS.





**ANTICIPATING SHIFTS
FOR RAMADAN 2023**

TRAVEL WILL MAKE A FULL-FLEDGED TAKE OFF

One of the biggest gainers of this returning outdoor normalcy will be the travel segment. Travel-related search interests will reach or exceed pre-pandemic levels, indicating impending demand.

In data:

67% OF RAMADAN SHOPPERS

are expected to make their travel purchases online.



“**AS AUDIENCES WILL BE BACK AT DOING MUDIK, IT’S CRITICAL FOR MARKETERS TO ALLOCATE THEIR BUDGETS ACCORDINGLY. MOST USERS WON’T BE IN BIG METRO CITIES SUCH AS JAKARTA, HENCE IT WILL BE NECESSARY TO DISTRIBUTE MEDIA INVESTMENT IN NON-METRO CITIES TO REACH AUDIENCES.**”

Aditya Putra,
Senior Media Planner & Buyer



BRIDGING ONLINE-OFFLINE USER EXPERIENCES WILL BE KEY

Seamlessly integrating online and offline experiences with outdoor activity returning, and users likely to flock to retail stores. **Establishing a solid omnichannel presence, and providing users personalised content in their purchase journey will be key** for brands to maximise conversion opportunities this Ramadan.

In data:

AROUND 80% OF INDONESIANS

say they need a trusted source of information before clicking “buy” and 94% want to read as much relevant information as possible before making a purchase.*

*Source: ThinkwithGoogle: Omnichannel-marketing-ramadan-2022

DOOH WILL BE EXTREMELY RELEVANT AS OUTDOOR MOBILITY GROWS

In data:
The DOOH segment in Indonesia is
projected to grow by

7.44%

(2023-2027) resulting in a market
volume of US\$128.40m in 2027.*

The end of Covid and related regulations will get people to travel and commute more often. More travelling and commuting will generate a higher opportunity for DOOH placements, as well as for content consumed while on the move, such as audio, streaming and social media.



“DIGITAL/OUT-OF-HOME PLACEMENTS ARE AN EFFECTIVE CHANNEL TO REACH USERS DURING RAMADAN AS PEOPLE ARE LIKELY TO BE OUT AND ABOUT MORE, ESPECIALLY THIS YEAR, AS RESTRICTIONS HAVE BEEN LIFTED. MARKETERS SHOULD USE THESE PLACEMENTS TO REACH THEIR TARGET AUDIENCE IN HIGH-TRAFFIC AREAS.”

Joddy Kusumo,
Senior Account Manager

*Source: Google: Rise_of_Dooh_Indonesia

MOBILE USAGE AND SHORT-FORM VIDEO CONSUMPTION WILL EXPAND FURTHER

In data:

65% of Ramadan shoppers or observers spend more time watching videos during Ramadan and Eid. 2 in 3 have watched online videos on Facebook, Instagram, WhatsApp, or Messenger. *

With normalcy returning, users will spend more time outdoors for prayers, at bazaars, shopping, travelling and commuting. This, coupled with long-distance travel plans to hometowns and provinces are likely to push mobile usage, especially mediums like OTT streaming and consumption of short videos for entertainment.

*Source: [Meta: Ramadan_Marketing_2023](#)

CONSUMER TRENDS



MID-HIGH INCOME GROUPS AND YOUNGER CONSUMERS WILL BE THE KEY AUDIENCE

KEY AUDIENCES

51%

of mid-income millennials

81%

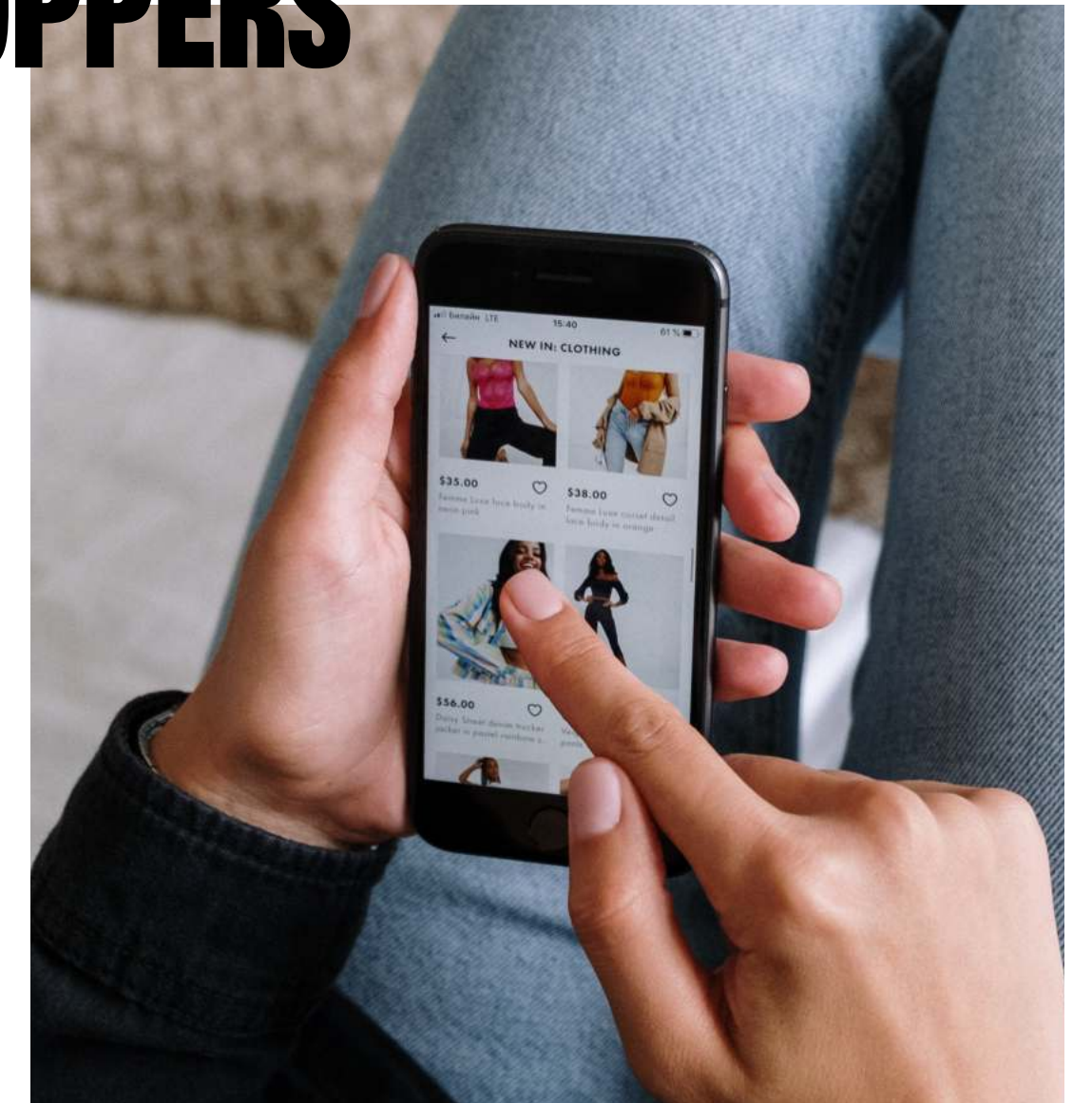
of high income millennials

74%

of mid-income GenZ

For brands, factoring such optimistic demographic segments who are likely to splurge more during the season offers an easy adopter route who would be fastest to convert.*

NON-METRO CONSUMERS ARE GOING TO BE BIG ONLINE SHOPPERS



In 2022,

72%

of new Indonesian internet users came from non-metro cities. It is therefore no surprise that this audience will become a big part of brand strategies.

*Source: McKinsey, Indonesian consumer sentiment during the coronavirus survey

A close-up photograph of a hand holding a glowing lightbulb. The hand is cupped, and the lightbulb is the central focus, emitting a warm, golden glow. The background is dark, making the lightbulb stand out.

**CREATIVE
COMMUNICATION**

Ramadan 2023 is already noting a headstart in consumer search interest, and celebrations are bound to grow big this year. Building on this excitement from a creative's POV will be equally vital.



“INDONESIANS LOVE HUMOUR. FOR THIS REASON, I WOULD RECOMMEND BLENDING YOUR BRAND’S SPIRITUAL RAMADAN MESSAGE WITH HUMOROUS STORYTELLING. THIS WILL MAKE YOUR BRAND MORE LIKEABLE AND EASY-TO-REMEMBER FOR USERS.”

Aditya Putra,
Senior Media Planner & Buyer

LEVERAGING UGC AND COMMUNITY BASED IDEAS

91%

of users like to see content that promotes community and togetherness on Facebook and Instagram, especially during Ramadan.*

PERSONALISED MESSAGING

71%

of shoppers or observers agree it's easier to complete their Ramadan shopping with personalised product recommendations and gifting suggestions.**

*Source: [Meta-Ramadan_Marketing_2023](#)

**Source: [Meta-Ramadan_Marketing_2023](#)

PARTNERING WITH **TRUSTWORTHY CREATORS** TO GENERATE AUTHENTIC CONTENT

Avoiding gimmicky content, the kind that doesn't seem like a brand plug-in, will be key as users are seeking genuine originality from creators.*

59% OF SHOPPERS OR OBSERVERS ARE MORE LIKELY TO TRUST A BRAND THAT PARTNERS WITH A TRUSTWORTHY CREATOR DURING RAMADAN AND EID. STORYTELLING AND INDUCE EMPATHY IN THEIR COMMUNICATION.



*Source: Meta-Ramadan_Marketing_2023)



PROMOTING OPTIMISM, CHARITY AND TOGETHERNESS

**RAMADAN IS A GREAT
OPPORTUNITY FOR BRANDS
TO PRACTISE MEANINGFUL
STORYTELLING AND INDUCE
EMPATHY IN THEIR
COMMUNICATION.**

**58% OF OBSERVERS SAID
THEY FELT “MORE CONNECTED
TO A BRAND” AFTER SEEING
RAMADAN OR EID CONTENT
ON FB AND IG**

From giving back to the community to building on optimism for better times, or to simply embrace mindfulness in one's daily life, occasions are plenty for brands to connect and form an emotional bond with the consumer.*

*Source: Meta - Foresight Interactive Report_Ramadan_2022

HOW TO SHAPE YOUR STRATEGY PRE, DURING & POST RAMADAN



Up to 2-3 weeks before Ramadan



The 4-week Ramadan month



The week of Eid

ENTERTAINMENT & MUSIC

SHOPPING

TRAVEL PLANNING

GAMING

PRAYER APPS

GIFTING

SOCIAL MEDIA

PRE-RAMADAN

A TIME OF EXCITEMENT AND BUZZ

2-3 weeks prior to the holy month, anticipation and elation begins to build up. Households are moving to prepare for the month by shopping for items ranging from decorations, to clothing, and even beauty.

Content begins to pace too with households searching for traditional recipes to prepare, while the younger generations are exploring festive ideas and inspiration for the month ahead on social media.

**SPIRITUALITY AT THIS
POINT IS BEGINNING
TO DEEPEN.**

RAMADAN

A TIME OF CELEBRATION, SPIRITUALITY & SHARING

Spirituality peaks as the holy month begins. Excitement and buzz is at its highest. Hence content consumption and trends begin to shift based on the daily schedule of Indonesians, as they adapt to the timings of Sehri and Iftar.

In the early hours of morning, families have Sehri together and spend time on music, books, and news as they prepare for the prayer call. Through noon and later afternoon, consumption of several modes of entertainment such as gaming, streaming, music, shopping, social media rises as users prepare for the evening prayer, followed by Iftar.

**SOCIAL MEDIA USAGE
GOES EVEN HIGHER AS
USERS CREATE AND SHARE
IFTAR-WORTHY CONTENT
AND MESSAGES WITH THEIR
FRIENDS & FAMILIES.**

EID

A TIME OF JOY AND FERVOUR

The final phase culminates with a spiritual renewal, along with a sense of togetherness and bonding with family and loved ones. At the centre of Eid-al-Fitr is sharing, gifting, and some much sought after travel as “Mudik” takes shape with Indonesians visiting their hometowns, while others plan for an extended vacation at different destinations to bond with families, and bid farewell to the holy month together.



“ IN ORDER TO HAVE A STRONGER RECALL ON ONLINE MEDIA CHANNELS DURING RAMADAN, IT IS KEY FOR BRANDS TO BUILD A SOLID PRESENCE BEFORE THE START OF RAMADAN. TO DO THAT, I WOULD COMBINE THE POWER OF IMPACTFUL SHOW-STOPPING AD PRODUCTIONS WITH UGC AND KOL CONTENT TO BOOST ORGANIC TRAFFIC. AT THE SAME TIME, I WOULD RECOMMEND LEVERAGING ON PROGRAMMATIC TO REACH AUDIENCES ON GAMING AND ENTERTAINMENT CHANNELS. ”

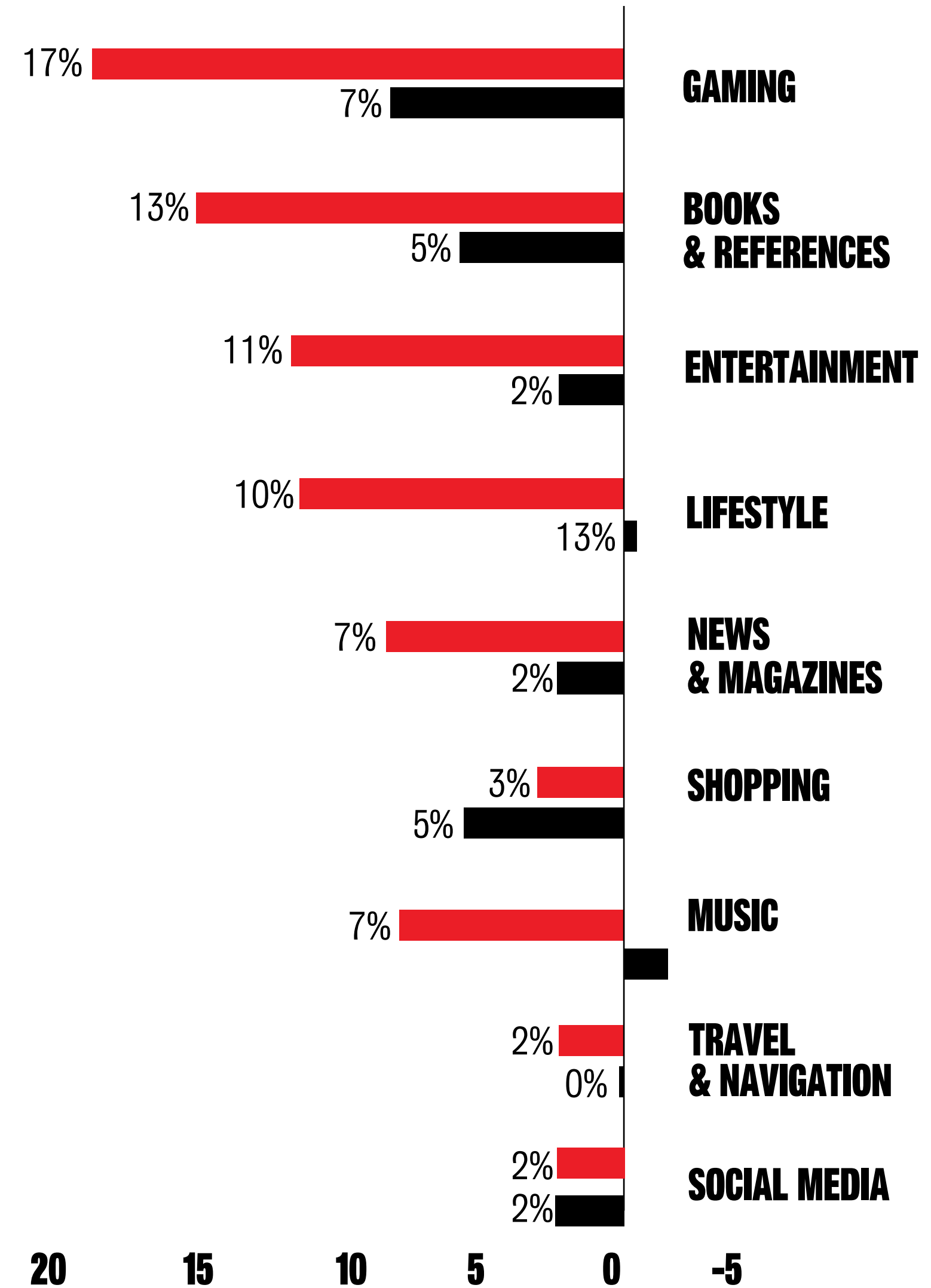
Abhyani Prastika,
Media Planner

TOP CHANNELS TO USE THIS RAMADAN

The top app categories with highest average growth in active users in 2021 and 2022 included: **gaming (12%)**, **books & reference apps (9%)**, **social & entertainment (8%)**, **lifestyle/news (5%)**, **shopping (4%)** and **music (3%)**.

This is largely a pool of high-indulgent categories that consumers engage with to relax and compliment their daily dose of fun, laughter and surprise. Let's deep dive into some of the top categories and decode the dynamics of utilising these for Ramadan 2023 campaigns:

TOP 10 APP CATEGORIES BY % CHANGE IN ACTIVE USERS DURING RAMADAN 2022-2021



■ 2022 % change in Ramadan ■ 2023 % change in Ramadan

GAMING

Gaming is the biggest media category used during Ramadan in Indonesia. As more people seek online entertainment during fasting hours, 46% of internet users spend more time playing games compared to other periods of the year. The most popular gaming apps used during Ramadan 2022 and 2021 were Mobile Legends, Roblox, Pubg, Ludo King and Subway Surfers.

Key Ramadan Phase:

Usage begins to grow during the holy month itself, peaking in usage around the mid-point of week 2 & 3.



Key Daily Time:

Mid-day, post-Sehri and pre-Iftar as users look to navigate their noon time as they await the prayers at dusk.



TOP GROWING GAMING APPS DURING RAMADAN 2022 & 2021

MOBILE LEGENDS



ROBLOX



LUDO KING



SUBWAY SURFERS



BOOKS & REFERENCE APPS

Reading apps and literature platforms have historically seen an upward trend as voracious readers destress and pass their time using these. The most popular apps used during Ramadan 2022 and 2021 were Webtoon and Wattpad, both of which noted a sharp surge in active users and number of hours spent.

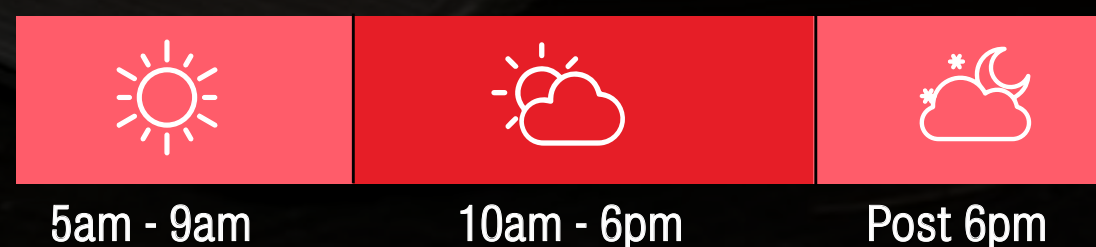
Key Ramadan Phase:

Usage begins to use during the Ramadan itself as users turn to variety across formats



Key Daily Time:

Mid-day, post-Sehri and pre-lftar to navigate their noon time.



TOP GROWING BOOKS & REFERENCE APPS DURING RAMADAN 2022 & 2021



WATTPAD
TIME SPENT **+20%**



WEBTOON
TIME SPENT **+12%**

SOCIAL & ENTERTAINMENT

Staying connected with friends and family during Ramadan takes an added upturn as users imbibe a communal feeling. At the same time, streaming platforms help users navigate through their routine with a dose of laughter and joy from their favourite content, as they await Iftar at dusk.

The most popular social apps used during Ramadan 2021-22 were largely the dominant set i.e., FBIG and TikTok. However, Snack and Helo have noted historical upticks during this time. On streaming, besides the top channels i.e, YouTube, Netflix and Amazon Prime, Vidio, is another regional platform noting high usage.




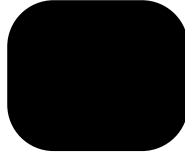






With top channels like Netflix, Disney Hostar and Amazon Prime not offering ad-products as of now, CTV advertising thus becomes a unique pathway to reach the engaged OTT user during Ramdan.

Indonesians lead OTT consumption in Southeast Asia, with a 40% YoY growth (2022 vs 2021). 1 in 3 Indonesians are streaming OTT content consuming 3.5 bn hours every month and almost half of them (42%) are willing to watch four or more ads for each hour of free content.

In the region, ad-supported viewership is rising with 50mn+ viewers relying on ad-supported OTT content. Most notably, brand recall of OTT ads is visibly improving too with 35% (2022) of OTT viewers recalling the brand that was advertised, compared to 23% in 2021.*

*Source: Trade Desk

TOP GROWING SOCIAL & ENTERTAINMENT APPS DURING RAMADAN 2022 AND 2021

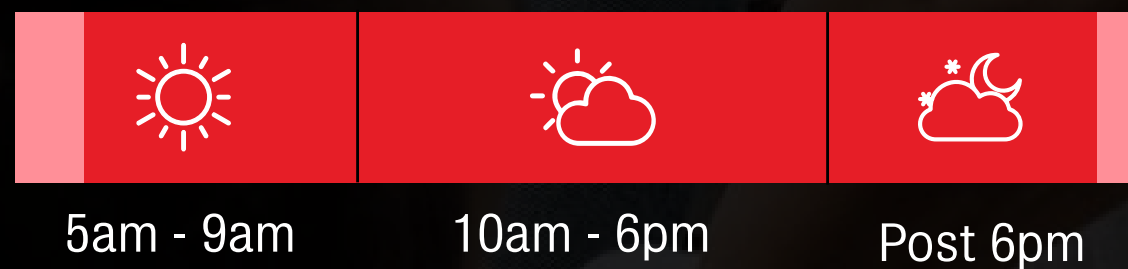
		Time spent	Active user
	TIKTOK	+16%	+31%
	FACEBOOK	+3%	+10%
	INSTAGRAM	+2%	+8%
	SNACK	+18%	+36%
	HELO	+79%	+90%
	YOUTUBE	+2%	+14%
	VIDIO	+24%	+25%
	NETFLIX	+2%	+12%
	HOTSTAR	+17%	+14%
	AMZ PRIME	+7%	+47%

SOCIAL

The Key Ramadan Phase:
Pre-ramadan specifically 2 weeks
prior the holy month as users are
connecting and generating buzz



The Key Daily Time:
Used round the clock.

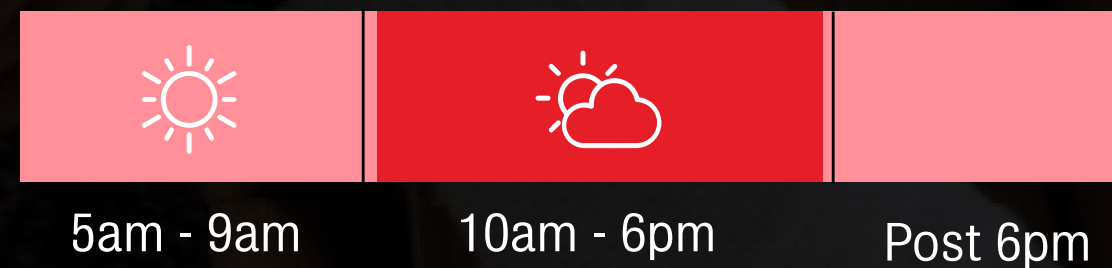


ENTERTAINMENT

The Key Ramadan Phase:
Peak in usage primarily during the
Ramadan month



The Key Daily Time:
primarily used during mid-day to pass
the time with video content.



“ DURING RAMADAN, WE NORMALLY SEE AN UPSURGE IN CONSUMPTION OF VIDEO. AS USERS SPEND MORE TIME CONSUMING VIDEO CONTENT, WE RECOMMEND BRANDS TO LEVERAGE ON PLATFORMS SUCH AS YOUTUBE, TIKTOK AND SNACK VIDEO. MOREOVER, WITH THE INDONESIAN GOVERNMENT SWITCHING OFF THE ANALOG TV SIGNAL AND MOVING IT DIGITALLY, BRANDS SHOULDN'T MISS OUT ON LEVERAGING OTT AND CONNECTED TV PLACEMENTS. ”

Felicia Mofa,
Media Planner

AUDIO STREAMING

Music and audio is an equally engaging entertainment stop among users as they seek to destress and pass their day listening to their favourite tunes. Spotify and regional platforms such as JOOX, oice and Resso are widely utilised.

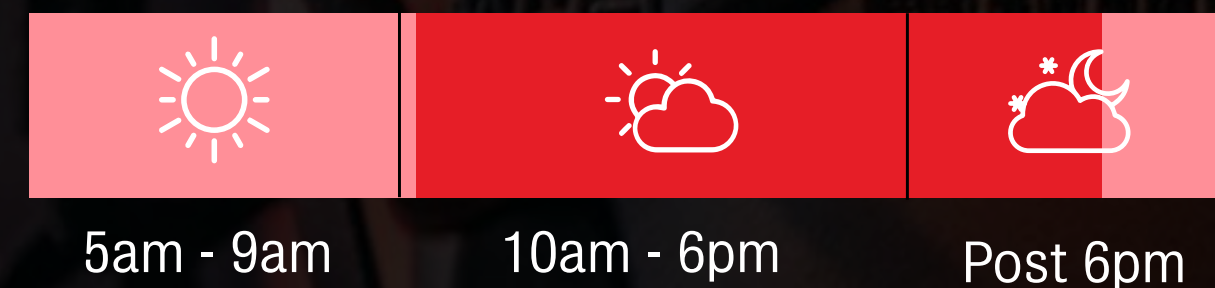
The Key Ramadan Phase:

Rise in usage through the Ramadan month.



The Key Daily Time:

Peak time hits around mid-day and in the evening post iftar too as users meet & greet and celebrate the evening iftar together.



“ THERE ARE COUNTLESS AVENUES TO ADVERTISE A BRAND DURING RAMADAN. IN 2023, I FORESEE THERE MIGHT BE A LOT OF POTENTIAL FOR AUDIO STREAMING PLATFORMS IN PARTICULAR, TO CAPTURE USERS WHILE THEY ARE COMMUTING FOR INSTANCE. BETWEEN THE SEVERAL AUDIO AD PLACEMENTS TO CONSIDER, NOICE RECENTLY LAUNCHED THEIR MONETIZATION FEATURE, PARTICULARLY EFFECTIVE AS IT REACHES USERS WITH LOCAL INDONESIAN CONTENT. ”

Joddy Kusumo,
Associate Director of Growth

TOP GROWING DIGITAL AUDIO APPS DURING RAMADAN 2022 & 2021



SPOTIFY

+2%



JOOX

+43%



RESSO

+17%



NOICE

+36%

Time spent



**IS YOUR
MEDIA STRATEGY
READY FOR THIS
RAMADAN?**

This Ramadan will bring lots of marketing opportunities for Indonesian brands.

With plenty of channels and placements to leverage on, an optimistic Indonesian market, and a return to normalcy after a few disruptive years, marketers should not miss out on the opportunity to reach their audience online.

**GET IN TOUCH IF YOU'D
LIKE US TO HELP YOU
PLAN YOUR MEDIA STRATEGY.**