INTRODUCTION
Millennial generation as “The New Rising Market”

The current and future Indonesian markets are dominated by millennials. By 2020, their population will be the largest and it will continue to dominate until 2035.
In 2020, 34% of Indonesia's population is the millennial group.

This dominance has implications for the character of the Indonesian population in the future. The hallmark of millennial characters is known as 3C, namely Creative, Confident, and Connected.
Internet users in Indonesia are dominated by Millennials.

- Their internet consumption is above 7 hours per day.

Millennial Loyalty levels are very low, including in politics.

59% Millennials like non-cash transactions

- Non-cash payment tools liked:
  - Debit Card: 50%
  - E Money: 33%
  - Credit Card: 17%

- It does not mean that they do not have money, but they do cashless transactions more often.
WORK SMART, WORK FAST

WORK CHARACTERS OF MILLENNIALS

<table>
<thead>
<tr>
<th>Character</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committed to Succeed</td>
<td>68.0</td>
</tr>
<tr>
<td>Independent Workers</td>
<td>45.0</td>
</tr>
<tr>
<td>Workplace Specialists</td>
<td>52.0</td>
</tr>
</tbody>
</table>

- They are not lazy generation
- They are adaptable, and work more effectively

MULTITASKING

MILLENNIAL WORKFORCE

- Millennials are accustomed to multitasking, they are able to do 2-3 jobs at the time

HAVING HOLIDAY ANYTIME AND ANYWHERE

- 1 of 3 millennials in Indonesia is on vacation at least once a year
- Vacationing is a primary need for millennials
**Ignore on Politics**

- They tend to be ignorant of politics
- Their topic of conversation is more about movie/music, sports, and IT

**Love to Share**

Caring on social issues, such as getting involved in online petitions, online donations, including responses to social issues.

Glad to share skills, knowledge and more, such as making hijab tutorials and cooking.

High Solidarity, especially for their followers, so they can easily share activities through vlogs, etc.

**Less Concern on Ownership**

- Accessibility is more important than ownership.

The growth of online transportation in Indonesia is getting bigger.
Nearly half of Indonesia’s Millennials have been addicted to the internet (heavy & addicted users). They access the internet by using a smartphone.

**INTERNET CONSUMPTION [%]**

- **< 1 hours**: 6.5 (Early Millennial), 13.4 (Late Millennial)
- **1-3 hours**: 45.0 (Early Millennial), 49.0 (Late Millennial)
- **4-6 hours**: 37.4 (Early Millennial), 30.5 (Late Millennial)
- **7-10**: 8.6 (Early Millennial), 4.4 (Late Millennial)
- **11-13 hours**: 1.4 (Early Millennial), 1.0 (Late Millennial)
- **> 13 hours**: 1.0 (Early Millennial), 0.8 (Late Millennial)

**DEVICES TO ACCESS INTERNET [%]**

- **Smartphone**: 98.2%
- **Personal Laptop**: 6.9%
- **Office PC**: 1.5%
- **Home PC**: 1.4%
- **Others**: 0.8%

Source: IDN Times research collaborated with Alvara Research Center, 2018
During several years, the potential of Indonesian e-commerce transactions grows dramatically.

**US$ 130 Billion (Rp 1,700 Trillion)**
In 2020

**US$ 20 Billion (Rp 261 Trillion)**
In 2016

**US$ 8 Billion (Rp 104 Trillion)**
In 2013

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*Source: Kata Data, processed from various sources*
The objective of this study is to obtain data and information related to habits and behavior of millennial consumers in using mobile e-commerce applications.

1. Measuring brand awareness
   - Brand awareness level
   - Sources of information about products and brands

2. Understanding consumer behavior and habits
   - The most used brand
   - Habit switching: Identifies the switching categories and usage patterns of mobile e-commerce applications

3. Measuring the level of satisfaction and customer loyalty
   - Satisfaction of mobile e-commerce application user in each category
   - Loyalty of mobile e-commerce application user in each category
E-COMMERCE

E-commerce is the activity of distributing, selling, purchasing, and marketing of products (goods and services), by utilizing telecommunications networks such as the internet and computer networks.

McLeod Pearson (2008: 59)
Electronic commerce or also called e-commerce, is the use of communication networks and computers to carry out business processes. The popular activity on e-commerce is the use of the internet and computers by accessing Web browsers to buy and sell products.

Shely Cashman (2007: 83) E-commerce or electronic commerce is a business transaction that occurs in electronic networks, such as the internet. Anyone who can access computers, have a connection to the internet, and have a way to pay for goods or services they buy, can participate in e-commerce.

E-commerce allows customers to shop or make transactions 24 hours a day from almost all location where the consumer is located.
RESEARCH METHODOLOGY

- Interview Method: Face-to-face Interview
- Sampling Method: Cluster Random Sampling
- Number of sample: 1,204 respondents
- Margin of error: 2.89%
- Research area: Jabodetabek, Bali, Padang, Yogyakarta and Manado
- Survey period: 3–20 April 2019
RESPONDENT PROFILE
1,204 respondents in 6 regions: Jakarta, Bodetabek, Bali, Padang, Yogyakarta, Manado
The majority of mobile application users are 25-34 years old (millennial generation), with the upper-middle-class economic status.

**GROUP OF AGE [%]**

- 17-24 y.o: 28.7%
- 25-29 y.o: 25.7%
- 30-34 y.o: 24.3%
- 35-39 y.o: 21.3%

**SES [%]**

- [A1] >Rp. 6.000.001: 15.5%
- [A2] Rp. 5.250.001 - Rp. 6.000.000: 22.6%
- [B] Rp. 4.500.001 - Rp. 5.250.000: 28.2%
- [C1] Rp. 3.750.001 - Rp. 4.500.000: 18.9%
- [C2] Rp. 3.000.001 - Rp. 3.750.000: 14.8%

N = 1204

ASS. [SHOW CARD] What is your occupation now? [S]
The number of respondents are balance between men and women; the majority are employees at private or state-owned enterprises.

**SEX [%]**

- Men: 49.8%
- Women: 50.2%

**OCCUPATION [%]**

- Private and government employees: 38.5%
- Entrepreneur: 24.1%
- Housewife: 19.2%
- Student: 13.2%
- Civil servant: 2.7%
- Others: 2.3%

N = 1204

N = 200

AS2. Which group is your age now? __________ year

AS3. [SHOWCARD] Includes which groups your household expenses per month for daily needs such as food, drinks, transportation, electricity, water, salary, etc. but does not include credit installments and non-routine expenses such as buying TV, vehicles etc.?
GENERAL FINDINGS
- Penetration of Application Usage
Applications of transportation services, food delivery, shopping have become daily necessities of consumers in all major cities.

MOBILE APPLICATION USAGE[%] - BY AREA

Note: Respondents can choose more than one answer
S1. Do you use the following mobile application? [Interviewer reads]
The majority of mobile application users are young (17-24 years), except for ticketing applications, the majority of users are 25-34 years old.

MOBILE APPLICATION USAGE [%] – BY AGE

<table>
<thead>
<tr>
<th>Category</th>
<th>17-24 y.o</th>
<th>25-29 y.o</th>
<th>30-34 y.o</th>
<th>35-39 y.o</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation Apps</td>
<td>97,4</td>
<td>96,5</td>
<td>96,6</td>
<td>94,9</td>
<td>1161</td>
</tr>
<tr>
<td>Shopping Apps</td>
<td>77,2</td>
<td>77,1</td>
<td>74,3</td>
<td>79,3</td>
<td>923</td>
</tr>
<tr>
<td>Ticketing and Hotel Booking</td>
<td>9,5</td>
<td>12,9</td>
<td>12,3</td>
<td>12,5</td>
<td>124</td>
</tr>
<tr>
<td>Apps</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital Payment Apps</td>
<td>29,5</td>
<td>31,6</td>
<td>27,7</td>
<td>31,3</td>
<td>340</td>
</tr>
<tr>
<td>Food Delivery Apps</td>
<td>87,3</td>
<td>90,3</td>
<td>89,0</td>
<td>84,0</td>
<td>1054</td>
</tr>
</tbody>
</table>
The highest penetration in mobile apps usage is on transportation, food delivery, and online shopping categories. Indonesian companies dominate as market leaders in those categories, except in shopping applications.

MOBILE APPLICATION USAGE [%]

Transportation Apps
N = 1161

Gojek 70,4%
Grab 45,7%

Food Delivery Apps
N = 1054

Gojifood 71,7%
Bukalapak 14,4%
Tokopedia 15,4%

Shopping Apps
N = 923

Shopee 32,2%
Zalora 1,1%
JD.ID 1,1%

Digital Payment Apps
N = 340

GoPay 67,9%
OVO 33,8%
Dana 8,5%

Ticketing and Hotel Booking Apps
N = 124

Ticket.com 8,9%
AirAsia 3,2%
Air Asia 2,4%

* Respondents can choose more than one application
FINDINGS OF EACH APPLICATION USAGE
- Transportation Application
Women and young millennials use transportation apps more often.

FREQUENCY OF USE [%]
n: 1161

Light User: Frequency > once a month
Medium User: Frequency once every 1-2 weeks
Heavy User: Frequency more than once per week
Go-Jek is better known among consumers and the more preferred transportation app for future use.
In the transportation service category, Go-Jek becomes the market leader with higher level of awareness, usage, and customer loyalty than its competitors.

<table>
<thead>
<tr>
<th>BRAND PERFORMANCE (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GoJek</td>
</tr>
<tr>
<td>IMAGE</td>
</tr>
<tr>
<td>LOYALTY</td>
</tr>
<tr>
<td>ENGAGEMENT</td>
</tr>
<tr>
<td>PERFORMANCE</td>
</tr>
</tbody>
</table>

N = 1161
Consumers' main perceptions of Go-Jek are about quality of services, while Grab is more associated with promos and price.

**ASSOCIATION [%]**

<table>
<thead>
<tr>
<th>GO-JEK</th>
<th>N = 1158</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online transport app</td>
<td>39.4</td>
</tr>
<tr>
<td>Easy to use</td>
<td>13.9</td>
</tr>
<tr>
<td>Faster</td>
<td>11.2</td>
</tr>
<tr>
<td>Cheapest app</td>
<td>8.8</td>
</tr>
<tr>
<td>Popular</td>
<td>6.5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GRAB</th>
<th>N = 1152</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online transport app</td>
<td>41.1</td>
</tr>
<tr>
<td>Cheapest app</td>
<td>13.3</td>
</tr>
<tr>
<td>Lot of promos</td>
<td>12.1</td>
</tr>
<tr>
<td>Easy to use</td>
<td>11.7</td>
</tr>
<tr>
<td>Faster</td>
<td>7.8</td>
</tr>
</tbody>
</table>

A3. Now we talk about the “Association of Mobile Application Transportation”
What do you think when you hear about these applications?
According to the majority of dual applications users, Go-Jek is more reliable than Grab.

RELIABILITY OF MOBILE TRANSPORTATION APP [%]

More Reliable 44.2%  
Go-Jek 27.9  
Equal 28.4%  
More Reliable 21.4%  
Grab 20.8  
6.6

N = 1144

A15. a. [SHOWCARD] Talking of the comparison of the reliability of GOJEK’s Mobile Application and Grab, please choose one according to your opinion? (S) (Only for users of both Gojek and Grab)
More consumers recommend Go-Jek than Grab.

**RECOMMENDATION LEVEL - Net Promoter Score (NPS)**

![Scale of Recommendation on a Product]

<table>
<thead>
<tr>
<th>Total</th>
<th>USED MOST OFTEN</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gojek</td>
</tr>
<tr>
<td>N</td>
<td>826</td>
</tr>
<tr>
<td>Detractors</td>
<td>8.7</td>
</tr>
<tr>
<td>Passives</td>
<td>63.7</td>
</tr>
<tr>
<td>Promoters</td>
<td>27.6</td>
</tr>
<tr>
<td>NPS</td>
<td>18.9</td>
</tr>
</tbody>
</table>

% Promoters = Percentage of respondents with a rating of 9 to 10 on a scale of 0-10

% Detractors = Percentage of respondents with a rating of 0 to 6 on a scale of 0-10
FINDINGS OF EACH APPLICATION USAGE
- Food Delivery Application
There are no significant differences based on gender and age in the food delivery apps usage.

**FREQUENCY OF USE [%]**

Light User: Frequency > once a month
Medium User: Frequency once every 1-2 weeks
Heavy User: Frequency more than once per week
Go-Food is better known among consumers and the more preferred food delivery app for future use.
In the food delivery service category, Go-Food becomes the market leader with higher level of awareness, usage, and customer loyalty than its competitors.

<table>
<thead>
<tr>
<th>BRAND AWARENESS [%] – MOST KNOWN APPLICATION</th>
<th>BRAND USAGE [%] – MOST USED APPLICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go-Food</td>
<td></td>
</tr>
<tr>
<td><img src="image1.png" alt="Image" /></td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td>70.1</td>
<td>71.7</td>
</tr>
<tr>
<td>29.9</td>
<td>39.9</td>
</tr>
<tr>
<td>TOM  SPONTAN PROM TED</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BRAND PERFORMANCE (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Go-Food</td>
</tr>
<tr>
<td>69.9</td>
</tr>
<tr>
<td>Go-Jek</td>
</tr>
<tr>
<td>70.9</td>
</tr>
<tr>
<td>Grab</td>
</tr>
<tr>
<td>69.0</td>
</tr>
</tbody>
</table>

N = 1161
Consumers' main perceptions of Go-Food are about quality of services, while Grab is more associated with promos and price.

B3. What do you think when you hear about these application?
The majority of food delivery app users across all age groups, Go-Food is the pioneer of food delivery app.

**PIONEER OF FOOD DELIVERY MOBILE APPLICATION [%] – BY AGE**

<table>
<thead>
<tr>
<th></th>
<th>TOTAL [%]</th>
<th>17 - 24 y.o</th>
<th>25 - 29 y.o</th>
<th>30 - 34 y.o</th>
<th>35 - 39 y.o</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gojek</td>
<td>73.7</td>
<td>75.1</td>
<td>76.9</td>
<td>72.1</td>
<td>69.8</td>
</tr>
<tr>
<td>Grab</td>
<td>19.0</td>
<td>16.9</td>
<td>17.7</td>
<td>20.9</td>
<td>21.4</td>
</tr>
<tr>
<td>Do not know</td>
<td>7.2</td>
<td>8.0</td>
<td>5.4</td>
<td>7.0</td>
<td>8.8</td>
</tr>
</tbody>
</table>

N = 1054
More consumers recommend Go-Food than Grab Food.

## RECOMMENDATION LEVEL - Net Promoter Score (NPS)

Scale of Recommendation on a Product

\[
NPS = \% \text{ Promoters} - \% \text{ Detractors}
\]

% Promoters = Percentage of respondents with a rating of 9 to 10 on a scale of 0-10
% Detractors = Percentage of respondents with a rating of 0 to 6 on a scale of 0-10

<table>
<thead>
<tr>
<th>Total</th>
<th>Used Most Often</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Go-Food</td>
</tr>
<tr>
<td>N</td>
<td>756</td>
</tr>
<tr>
<td>Detractors</td>
<td>7.4</td>
</tr>
<tr>
<td>Passives</td>
<td>70.4</td>
</tr>
<tr>
<td>Promoters</td>
<td>22.3</td>
</tr>
<tr>
<td>NPS</td>
<td>14.9</td>
</tr>
</tbody>
</table>
FINDINGS OF EACH APPLICATION USAGE
- Shopping Application
The frequency of shopping apps usage is not too high compared to other apps.

**FREQUENCY OF USE [%]**

- **Light User**: Frequency > once a month
- **Medium User**: Frequency once every 1-2 weeks
- **Heavy User**: Frequency more than once per week
Lazada, Shopee, Bukalapak and Tokopedia are the most popular brands with high levels of respondents willing to use them in the future.
Lazada, Blibli.com, and Bukalapak are the top three in brand performance

<table>
<thead>
<tr>
<th></th>
<th>IMAGE</th>
<th>LOYALTY</th>
<th>ENGAGEMENT</th>
<th>PERFORMANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bukalapak</td>
<td>69.90</td>
<td>69.42</td>
<td>68.61</td>
<td>69.30</td>
</tr>
<tr>
<td>Tokopedia</td>
<td>68.98</td>
<td>68.27</td>
<td>66.99</td>
<td>68.07</td>
</tr>
<tr>
<td>OLX</td>
<td>68.51</td>
<td>69.06</td>
<td>69.01</td>
<td>68.86</td>
</tr>
<tr>
<td>Shopee</td>
<td>68.52</td>
<td>67.55</td>
<td>67.86</td>
<td>67.98</td>
</tr>
<tr>
<td>Lazada</td>
<td>71.15</td>
<td>69.26</td>
<td>68.33</td>
<td>69.57</td>
</tr>
<tr>
<td>Blibli.com</td>
<td>70.56</td>
<td>66.68</td>
<td>70.70</td>
<td>69.33</td>
</tr>
</tbody>
</table>
Lazada is widely known for allowing consumers to pay cash on delivery and as a popular shopping applications, while Shopee is known for its free shipping.

C3. a. What do you think when you hear about these applications?
In online shopping application, most respondents are interested in fashion items, except in OLX where they are interested in buying electronic goods.

<table>
<thead>
<tr>
<th>ITEMS USUALLY PURCHASED [%]</th>
<th>Total Respondent</th>
<th>Bukalapak</th>
<th>Tokopedia</th>
<th>OLX</th>
<th>Shopee</th>
<th>Lazada</th>
<th>Zalora</th>
<th>Blibli.com</th>
<th>Elevenia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fashion (Clothes, Shoes, Headscarf, Watches, etc.)</td>
<td>1078</td>
<td>126</td>
<td>135</td>
<td>51</td>
<td>291</td>
<td>433</td>
<td>9</td>
<td>14</td>
<td>4</td>
</tr>
<tr>
<td>Electronic (TV, Radio, Computer, Fan, etc)</td>
<td>90.0</td>
<td>83.1</td>
<td>88.1</td>
<td>56.9</td>
<td>95.5</td>
<td>93.8</td>
<td>100.0</td>
<td>64.3</td>
<td>100.0</td>
</tr>
<tr>
<td>Gadget (Smartphone, HP)</td>
<td>17.4</td>
<td>25.8</td>
<td>25.2</td>
<td>72.5</td>
<td>8.9</td>
<td>12.2</td>
<td>11.1</td>
<td>35.7</td>
<td>.</td>
</tr>
<tr>
<td>Food</td>
<td>6.0</td>
<td>8.1</td>
<td>5.2</td>
<td>21.6</td>
<td>4.1</td>
<td>4.6</td>
<td>.</td>
<td>14.3</td>
<td>.</td>
</tr>
<tr>
<td>Books (Novel, Comic, etc)</td>
<td>3.3</td>
<td>1.6</td>
<td>3.0</td>
<td>.</td>
<td>4.5</td>
<td>3.4</td>
<td>.</td>
<td>7.1</td>
<td>.</td>
</tr>
<tr>
<td>Cosmetic</td>
<td>2.8</td>
<td>3.2</td>
<td>6.7</td>
<td>3.9</td>
<td>1.4</td>
<td>2.1</td>
<td>.</td>
<td>14.3</td>
<td>.</td>
</tr>
<tr>
<td>Drugs</td>
<td>2.3</td>
<td>0.8</td>
<td>.</td>
<td>.</td>
<td>2.4</td>
<td>3.9</td>
<td>.</td>
<td>.</td>
<td>.</td>
</tr>
<tr>
<td>Toys</td>
<td>1.9</td>
<td>0.8</td>
<td>0.7</td>
<td>.</td>
<td>2.1</td>
<td>2.8</td>
<td>.</td>
<td>.</td>
<td>.</td>
</tr>
</tbody>
</table>

D8. What type of items do you usually buy in the Mobile Application Shopping that you use in D1e?
Meanwhile, the highest NPS score is owned by Shopee, followed by Tokopedia, and Lazada

RECOMMENDATION LEVEL - Net Promoter Score (NPS)

<table>
<thead>
<tr>
<th>Total</th>
<th>Buka lapak</th>
<th>Tokopedia</th>
<th>OLX</th>
<th>Shopee</th>
<th>Lazada</th>
<th>Blibli.com</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>103</td>
<td>108</td>
<td>43</td>
<td>240</td>
<td>390</td>
<td>12</td>
</tr>
<tr>
<td>Detractors</td>
<td>3.9</td>
<td>4.6</td>
<td>20.9</td>
<td>4.2</td>
<td>5.6</td>
<td>8.3</td>
</tr>
<tr>
<td>Passives</td>
<td>84.5</td>
<td>81.5</td>
<td>62.8</td>
<td>80</td>
<td>80.3</td>
<td>83.3</td>
</tr>
<tr>
<td>Promoters</td>
<td>11.7</td>
<td>13.9</td>
<td>16.3</td>
<td>15.8</td>
<td>14.1</td>
<td>8.3</td>
</tr>
<tr>
<td>NPS</td>
<td>7.8</td>
<td>9.3</td>
<td>-4.7</td>
<td>11.7</td>
<td>8.5</td>
<td>0</td>
</tr>
</tbody>
</table>

Scale of Recommendation on a Product

\[
\text{NPS} = \% \text{ Promoters} - \% \text{ Detractors}
\]

\(\% \text{ Promoters} = \) Percentage of respondents with a rating of 9 to 10 on a scale of 0-10

\(\% \text{ Detractors} = \) Percentage of respondents with a rating of 0 to 6 on a scale of 0-10
FINDINGS OF EACH APPLICATION USES
- Ticketing and Hotel Booking Application
Traveloka is the most popular ticket and hotel booking application with the highest number of respondents willing to use it in the future.
Traveloka is perceived as an app with many promos, while Tiket.com and KAI Access are perceived as an app with ease of use.

**ASOSIATION [%] -1**

**Traveloka**  
- Lot of promos: 17,3%  
- Online ticket: 17,6%  
- Cheap: 12,4%  
- Easy to use: 17,3%  
- App of travel ticket: 8,8%

**Tiket.com**  
- Easy to use: 20,7%  
- Online ticket: 20,7%  
- Lot of promos: 19,8%  
- Cheap: 10,8%  
- App of travel ticket: 9,0%

**Blibli.com**  
- Online ticket: 16,7%  
- Lot of promos: 13,0%  
- App of travel ticket: 13,0%  
- Popular travel ticket: 9,3%  
- Easy to use: 7,4%

**KAI Access**  
- Easy to use: 26,5%  
- Cheap: 14,7%  
- Safety service: 11,8%  
- Trusted service: 11,8%  
- Train app: 11,8%

E3. a. What do you think when you hear about these application?
Traveloka's brand performance is higher than Tiket.com
The promos at Traveloka are widely used by the majority of millennials. While Tiket.com and KAI Access are usually used during the Eid and Christmas holiday.

<table>
<thead>
<tr>
<th>TIMING TO BUY TICKETS [%]</th>
<th>Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Traveloka</td>
</tr>
<tr>
<td>Long Holiday</td>
<td>29.2</td>
</tr>
<tr>
<td>Eid and Christmas holiday</td>
<td>24.0</td>
</tr>
<tr>
<td>When there is a promo</td>
<td>36.5</td>
</tr>
<tr>
<td>Working holiday</td>
<td>4.2</td>
</tr>
<tr>
<td>Emergency</td>
<td>1.0</td>
</tr>
<tr>
<td>Others</td>
<td>5.2</td>
</tr>
<tr>
<td>Total</td>
<td>100.0</td>
</tr>
</tbody>
</table>
Traveloka also has a higher NPS score than Tiket.com

RECOMMENDATION LEVEL - Net Promoter Score (NPS)

Scale of Recommendation on a Product

NPS = % Promoters - % Detractors

% Promoters = Percentage of respondents with a rating of 9 to 10 on a scale of 0-10
% Detractors = Percentage of respondents with a rating of 0 to 6 on a scale of 0-10

<table>
<thead>
<tr>
<th>Total</th>
<th>USED MOST OFTEN</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Traveloka</td>
</tr>
<tr>
<td>N</td>
<td>94</td>
</tr>
<tr>
<td>Detractors</td>
<td>3.2</td>
</tr>
<tr>
<td>Passives</td>
<td>77.9</td>
</tr>
<tr>
<td>Promoters</td>
<td>18.9</td>
</tr>
<tr>
<td>NPS</td>
<td>15.8</td>
</tr>
</tbody>
</table>
FINDINGS OF EACH APPLICATION USAGE
- Digital Payment Application
Go-Pay is the most popular and the most preferred digital payment app for future use.
When consumers hear about digital payments, they associate those most with app-based payment services.

ASOSIATION [%] -1

OVO N = 309
- Lot of promos/ discount: 21.7%
- Online payment app: 18.8%
- Easy to use: 8.7%
- Safety service: 6.5%
- Fast: 6.5%

GO-PAY N = 330
- Part of Go-Jek app: 14.8%
- Online payment app: 14.2%
- Lot of promos/ discount: 12.1%
- Fast: 9.4%
- Safety service: 9.1%

PayTren N = 80
- Phone bills payment: 25.0%
- Yusuf Mansyur: 18.8%
- Easy to use: 11.3%
- Online payment apps: 5.0%
- Efficient payment method: 5.0%

DANA N = 110
- Safety service: 14.5%
- Popular: 10.9%
- Trusted: 10.0%
- Cashback: 10.0%
- Online payment app: 9.1%

F3. What do you think about these apps______________ ?
As two popular digital payment application in Indonesia, Go-Pay’s brand performance is higher than OVO.
More consumers recommend Go-Pay than Ovo.

**RECOMMENDATION LEVEL - Net Promoter Score (NPS)**

![Graph showing promoters, passives, and detractors]

<table>
<thead>
<tr>
<th>Total</th>
<th>USED MOST OFTEN</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ovo</td>
</tr>
<tr>
<td>N</td>
<td>114</td>
</tr>
<tr>
<td>Detractors</td>
<td>7.1</td>
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<tr>
<td>Passives</td>
<td>76.5</td>
</tr>
<tr>
<td>Promoters</td>
<td>16.3</td>
</tr>
<tr>
<td>NPS</td>
<td>9.2</td>
</tr>
</tbody>
</table>

**Scale of Recommendation on a Product**

NPS = % Promoters - % Detractors

% Promoters = Percentage of respondents with a rating of 9 to 10 on a scale of 0-10
% Detractors = Percentage of respondents with a rating of 0 to 6 on a scale of 0-10
CONCLUSION
CONCLUSION - 1

- Millennial generation is the largest and most potential market in Indonesia, both in terms of quantity and behavior, which are different from other market segmentation.
- The biggest penetration of mobile application users is on transportation and food delivery apps.
- The most sought items on online shopping apps are fashion, electronics, and smartphones.
- This research shows that application-based service companies from Indonesia become the market leaders, except in the shopping apps category.
CONCLUSION - 2

• Go-Jek is a brand that dominates consumers in the transportation, food delivery, and digital payment apps sectors.

• Consumers view GO-FOOD as the pioneer of online food delivery and dominates the online food delivery market in Indonesia.

• Lazada is the only foreign company that has succeeded in becoming a leader in the shopping application category. Meanwhile, Shopee has the highest Net Promoter Score.

• Lazada, Shopee, Tokopedia, and Bukalapak are the most used brands in the shopping apps category.

• Traveloka and Tiket.com are the best-known ticketing and hotel booking apps, but Traveloka gain the upper hand in usage and brand performance.

• The majority of Traveloka users often buy airplane tickets, while Tiket.com’s users buy train tickets more often.
The chart below shows the market leaders in each app category based on the popularity, numbers of usage, and level of consumers’ willingness to recommend the brand.
Thank You

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