



Indonesia: The Consumer Marketplace

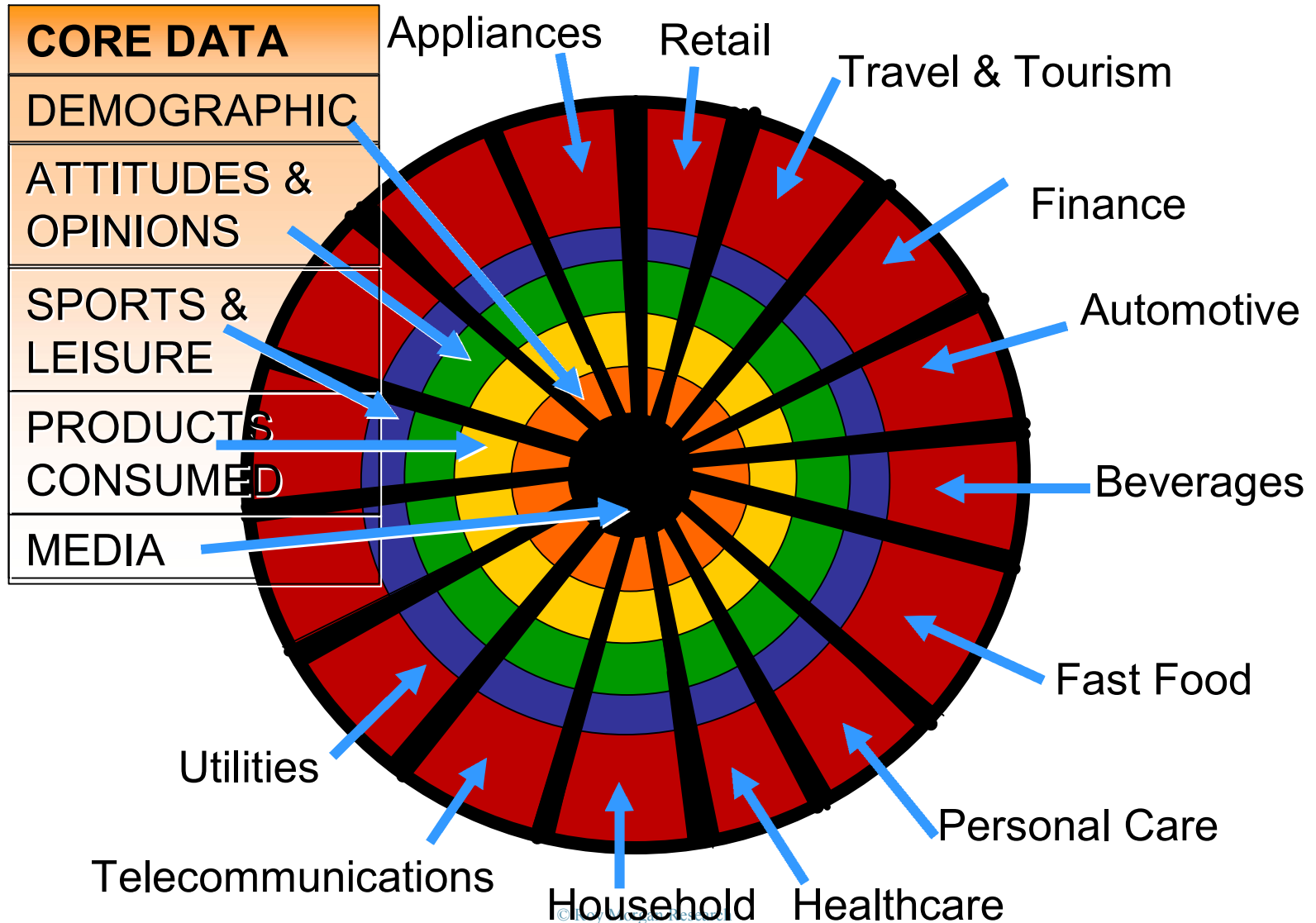
Debnath Guharoy,
Melbourne, 14 September 2006



What We Do in Indonesia: From Oct'2004

- *Urban & Rural: 2000 respondents per month in 16 provinces including the Top 20 cities, 20 small towns and rural surroundings.*
- *90% coverage of 14+ population: 25,000 respondents expanding to 30,000. A universe of 138 million people (actual over 158 million).*
- *Three parts, two visits: with the same respondent, over a 7-day period comprising Assisted Self-Completion and Media Diary.*
- *Firsts in Indonesia: Single Source; biggest continuous survey; Urban & Rural; Personal Income; Life Cycle; Quarterly updates...*
- *Adaptation of Australian Survey: replicated proven success, refined over 15 years. Over 300 clients, including government bodies...*

Single Source: 360-degree View



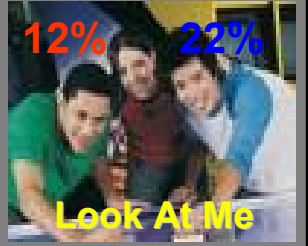
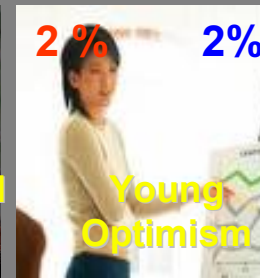
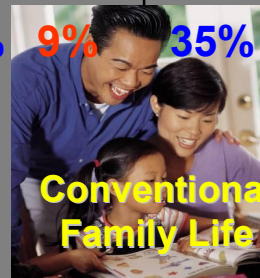
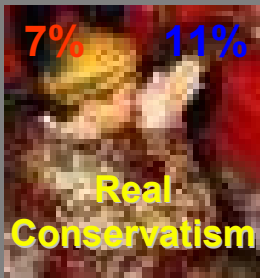
Life Satisfaction
Individualism
Quality Expectations



Roy Morgan Values Segments*

Developed with Colin Benjamin, The Horizons Network

Australian Population
Indonesian Population



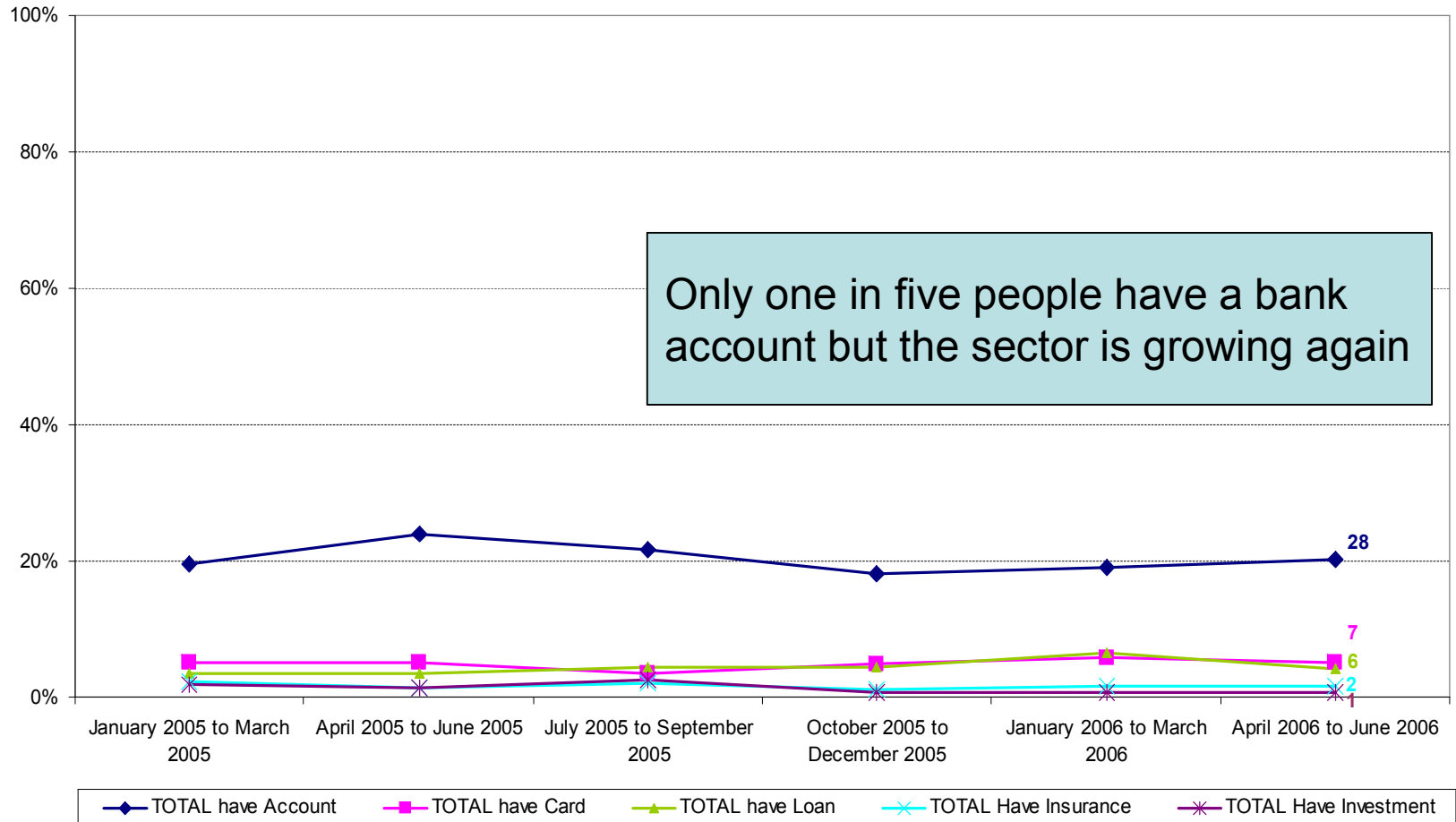
Price Expectations
Innovation
Progressiveness

Discover your edge

Economic Insights: Examples

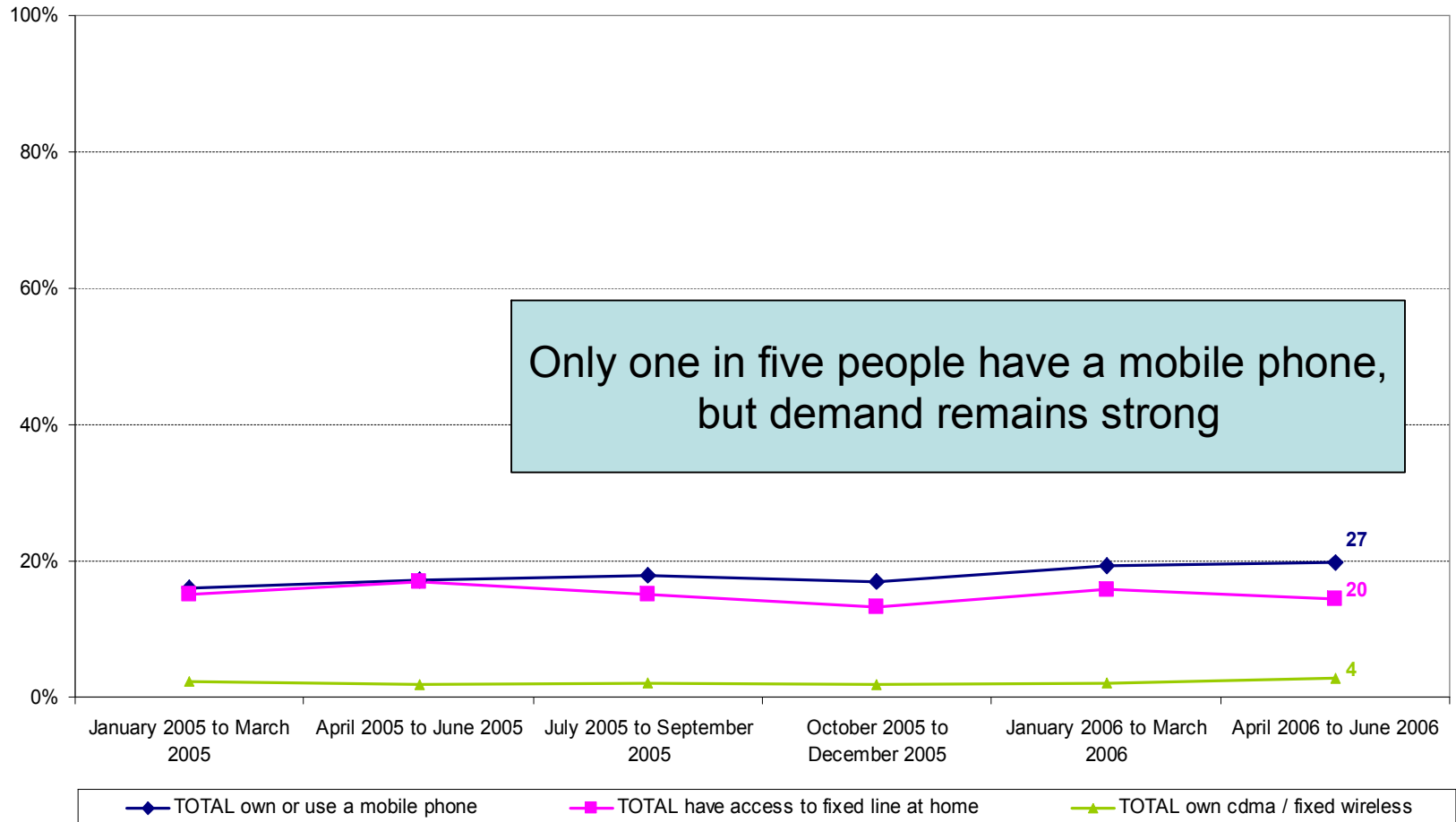
Financial Services: Penetration

Number of People in Millions



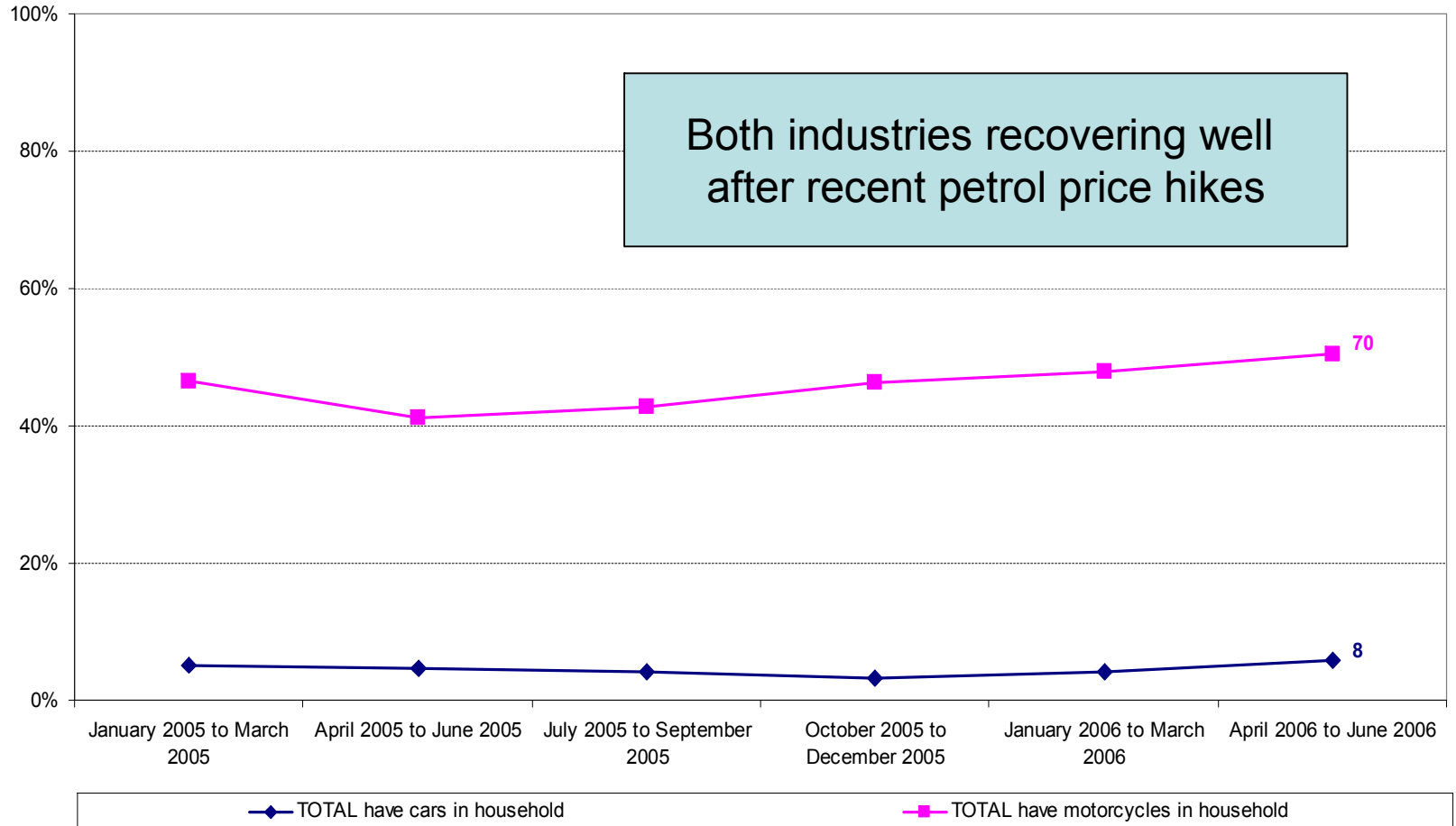
Telecommunication Services: Penetration

Number of People in Millions



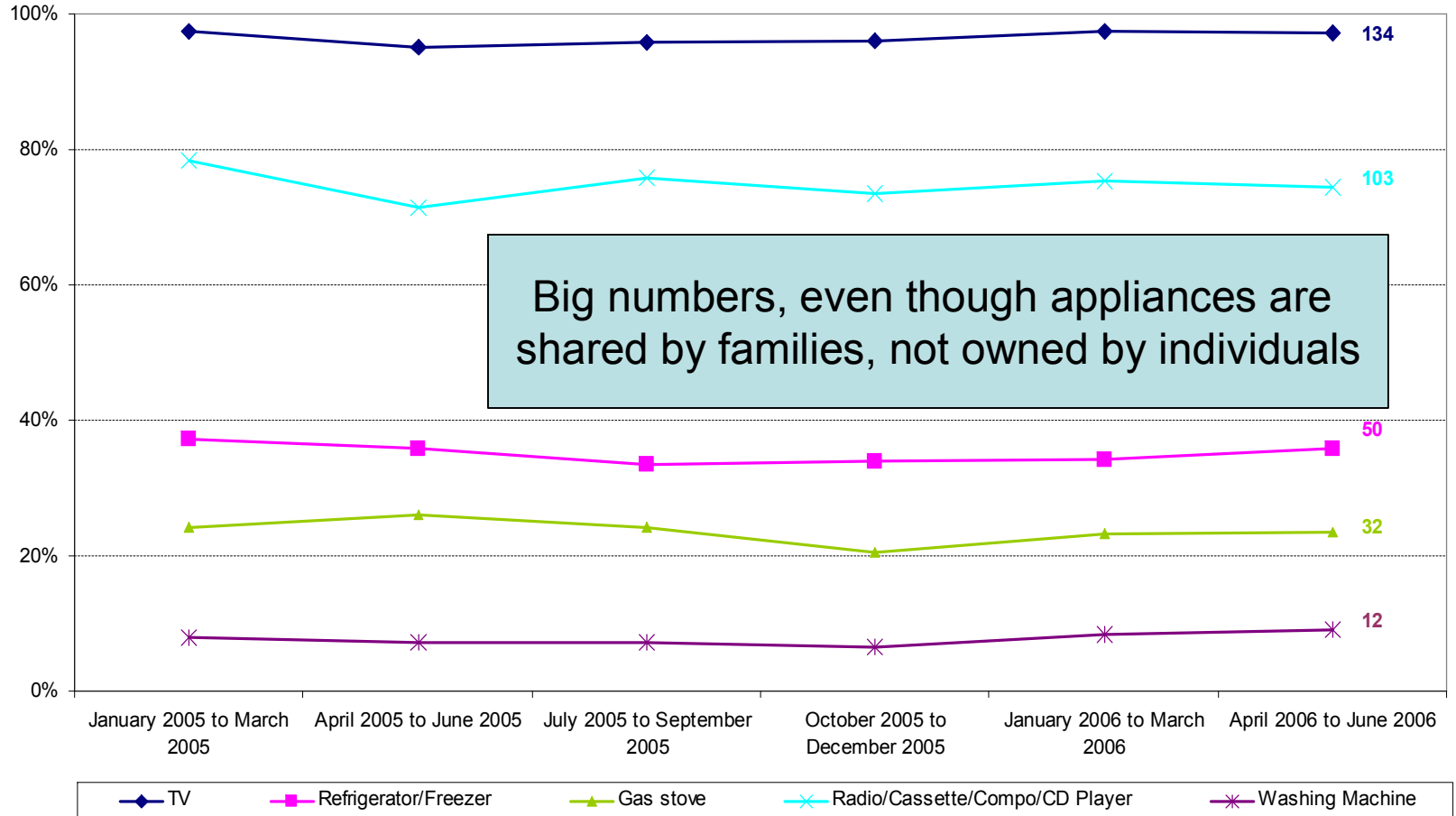
Vehicle Ownership: Penetration

Number of People in Millions



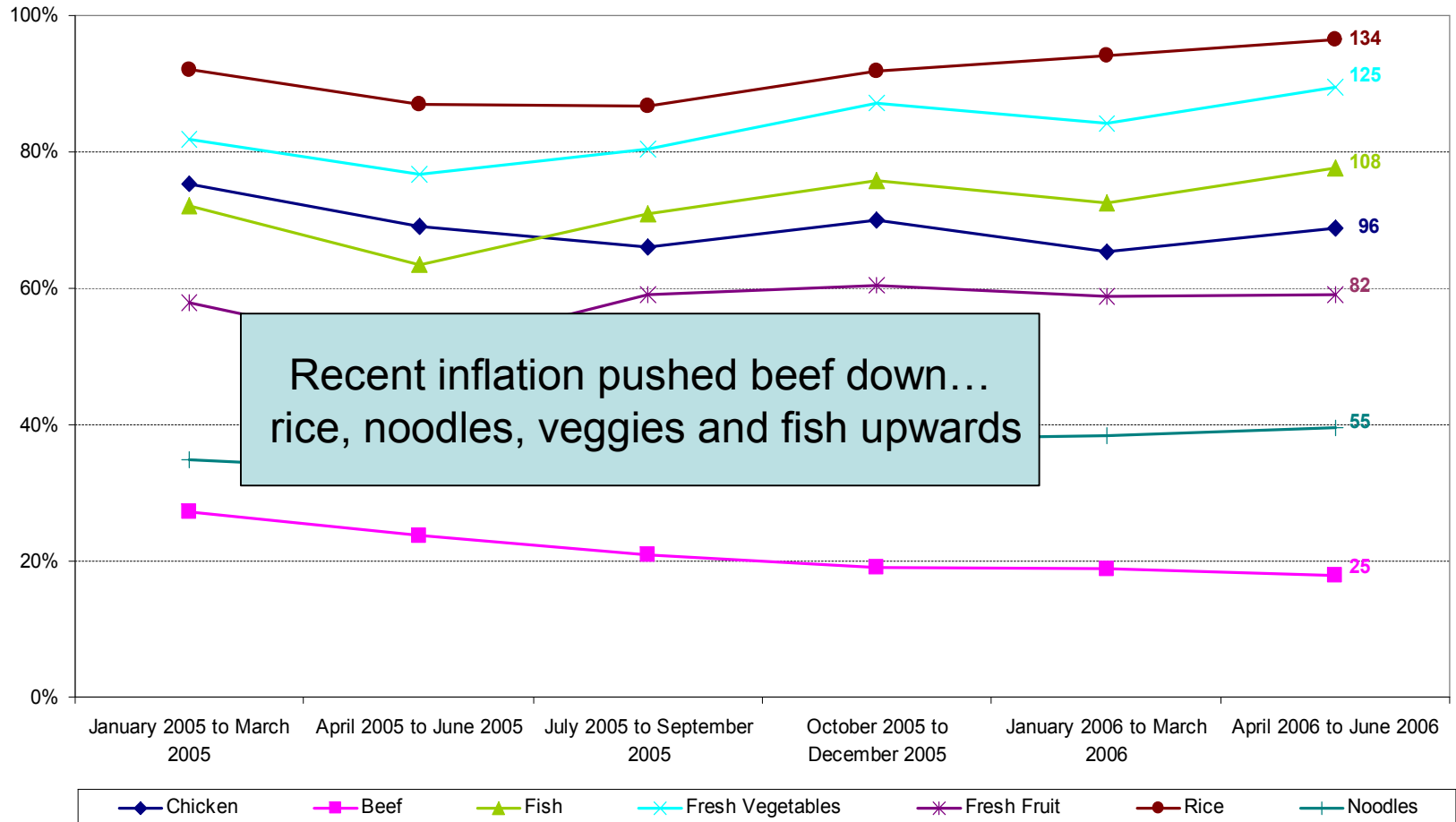
Home Appliances: Penetration

Number of People in Millions



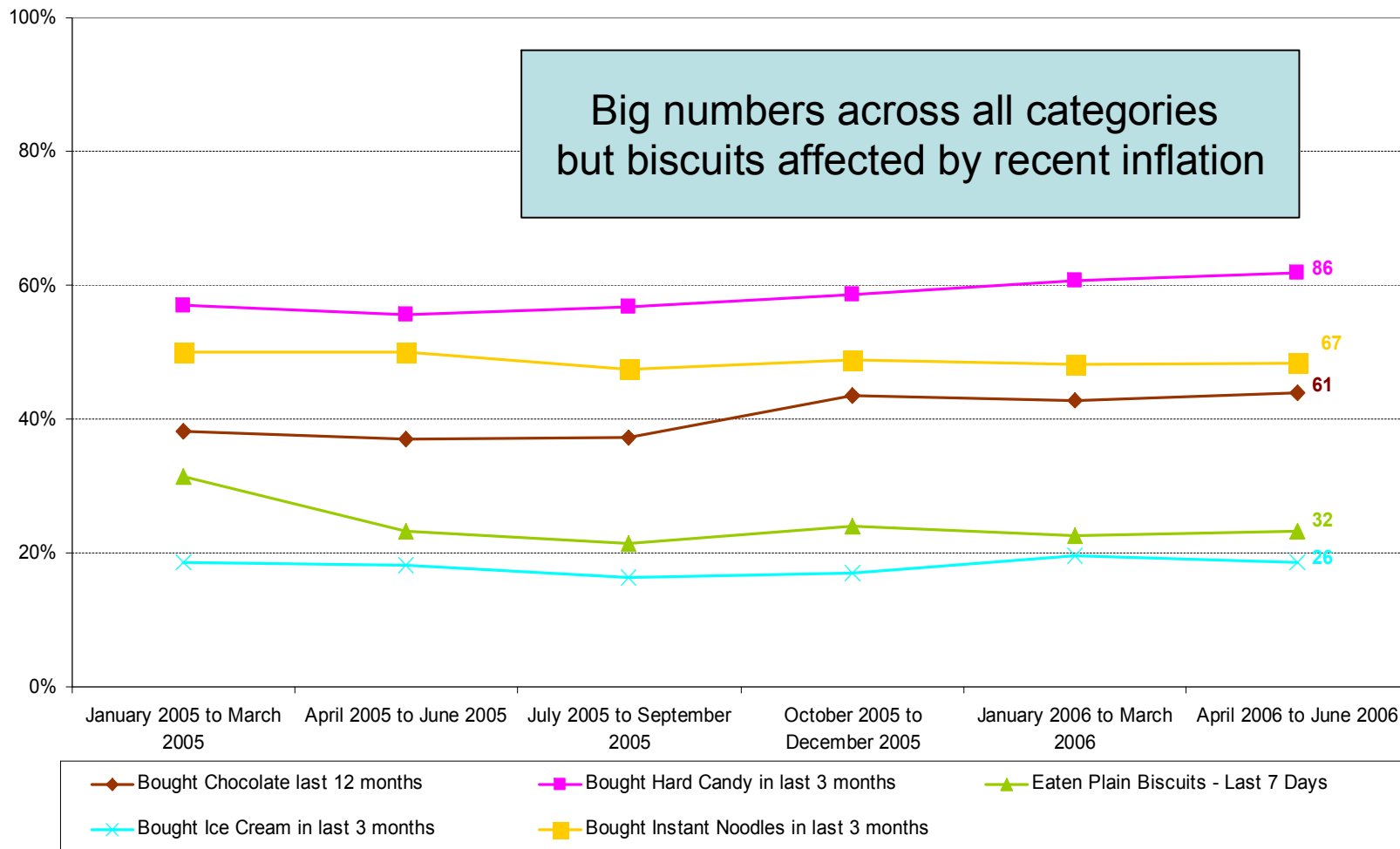
Food Eaten, Last 7 Days: Penetration

Number of People in Millions

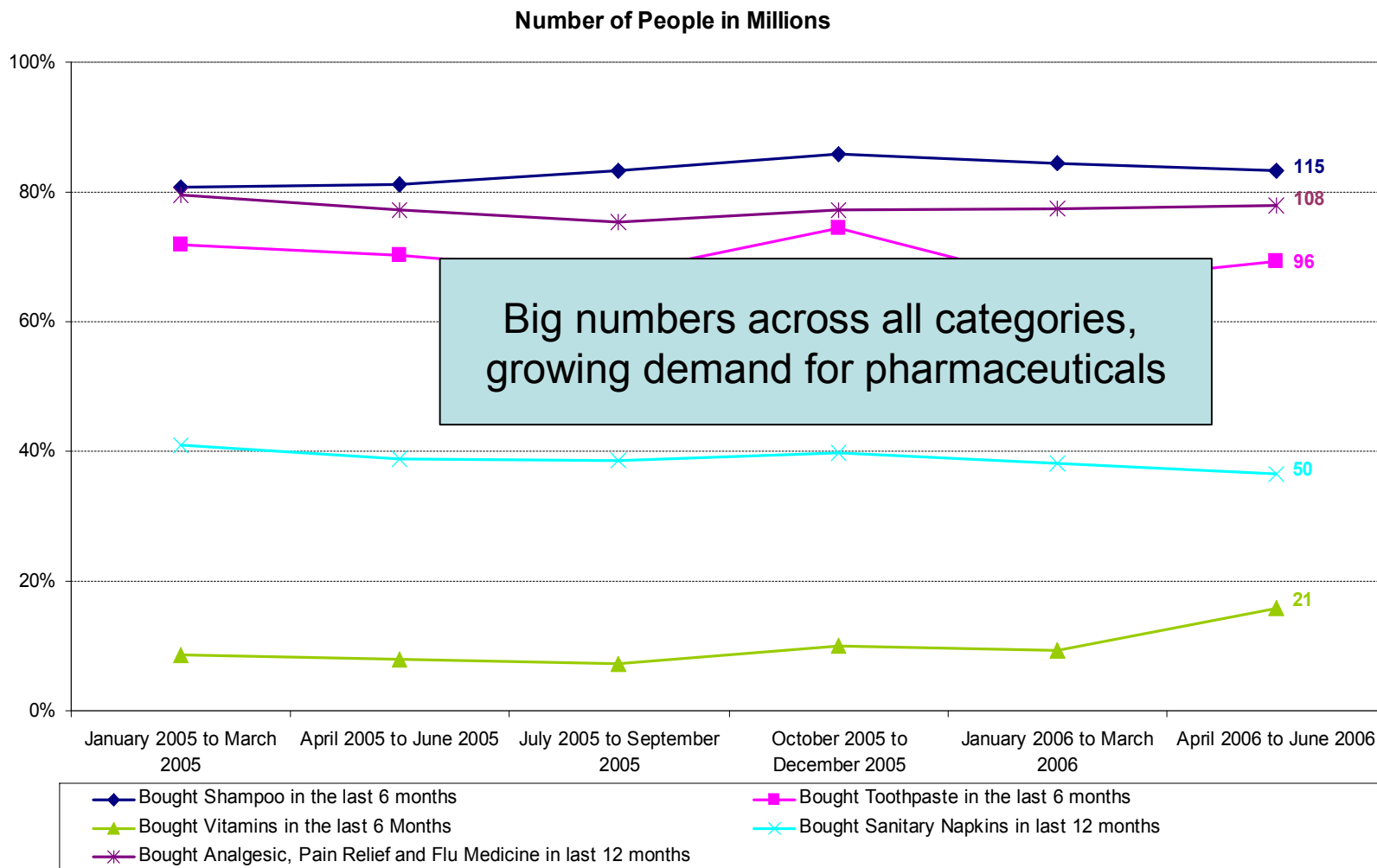


FMCG – Packaged Food: Penetration

Number of People in Millions

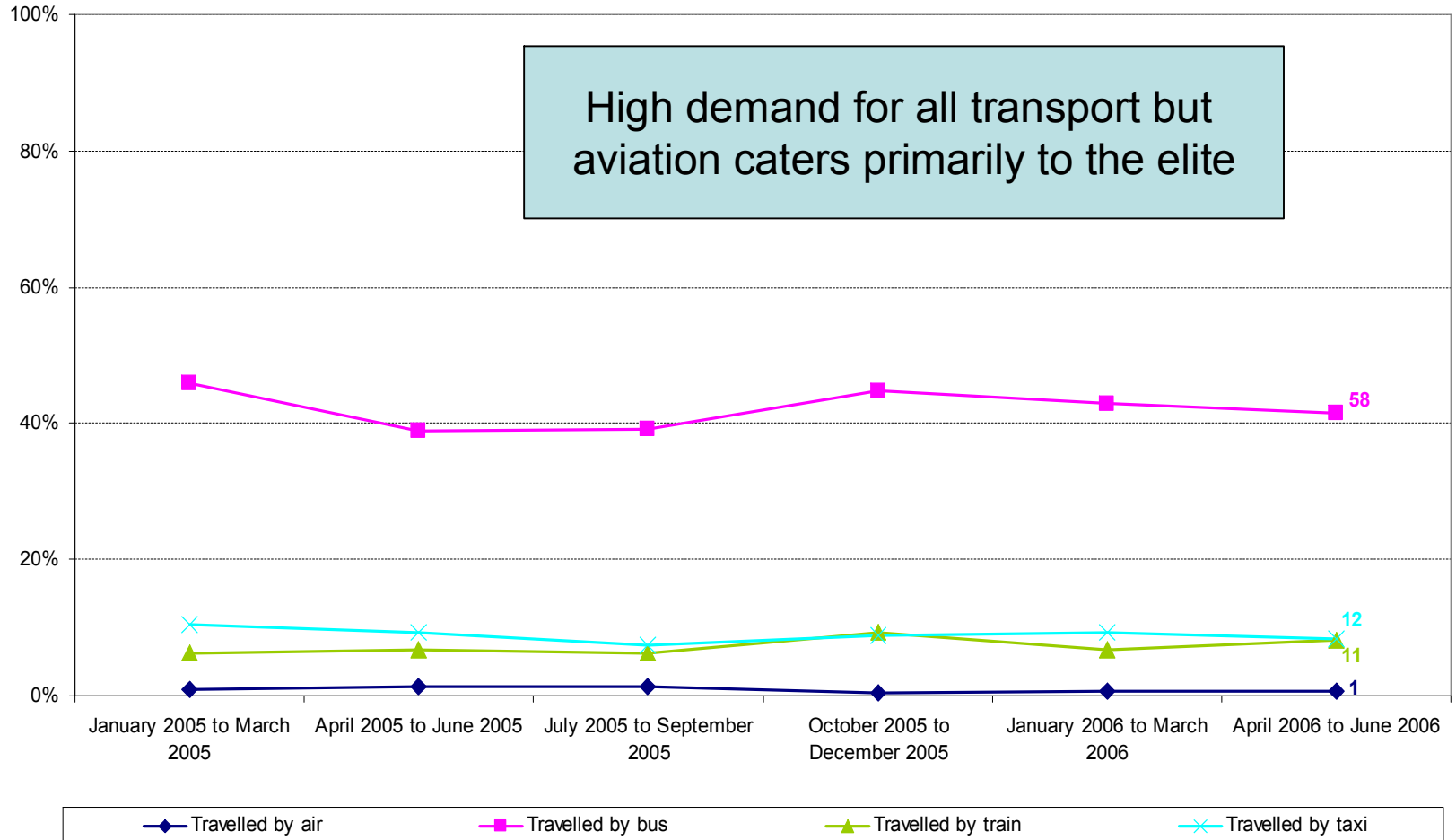


FMCG – Personal Products: Penetration



Use of Public Transportation: Penetration

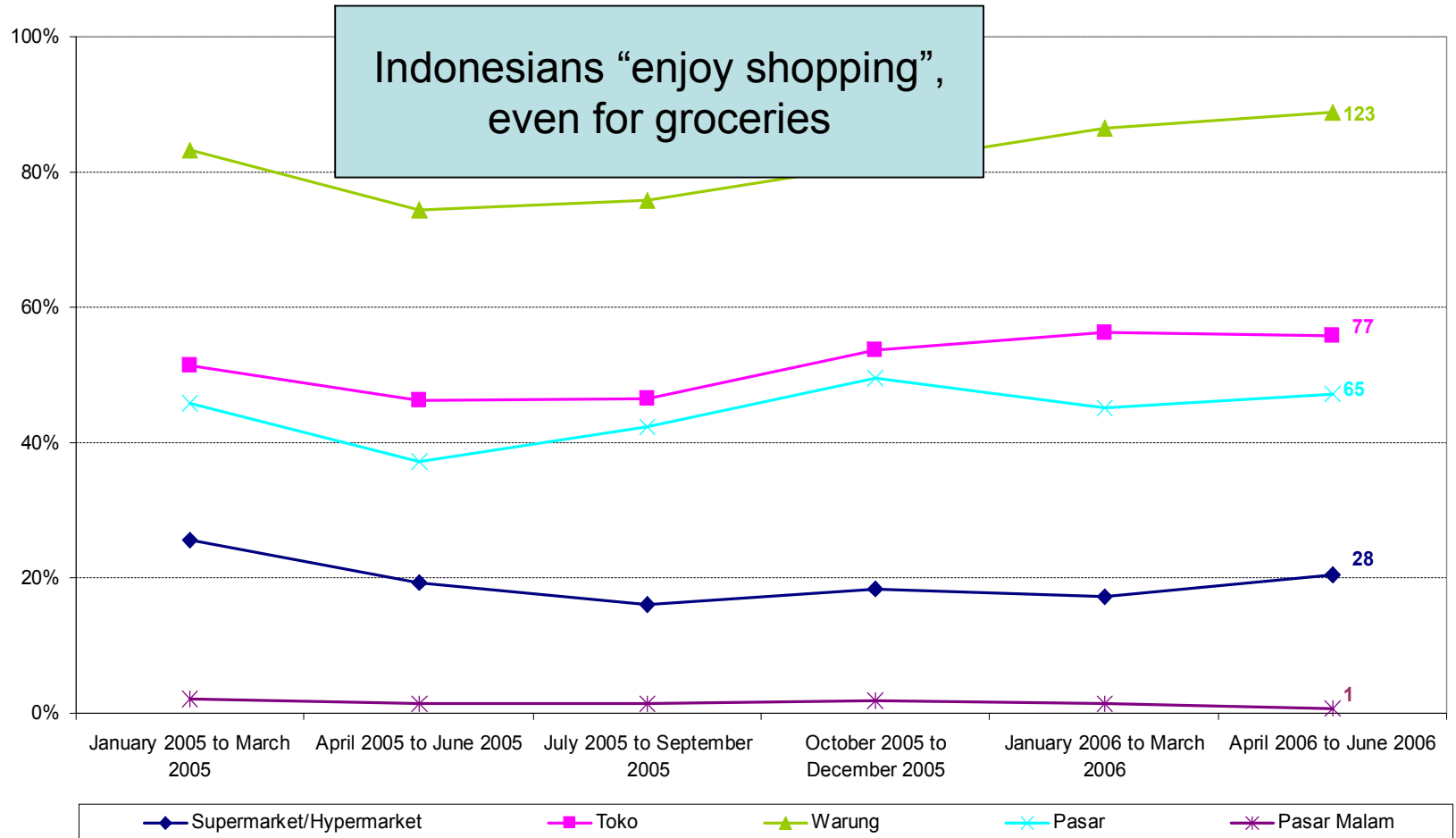
Number of People in Millions



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Retail Stores Visitation: Penetration

Number of People in Millions

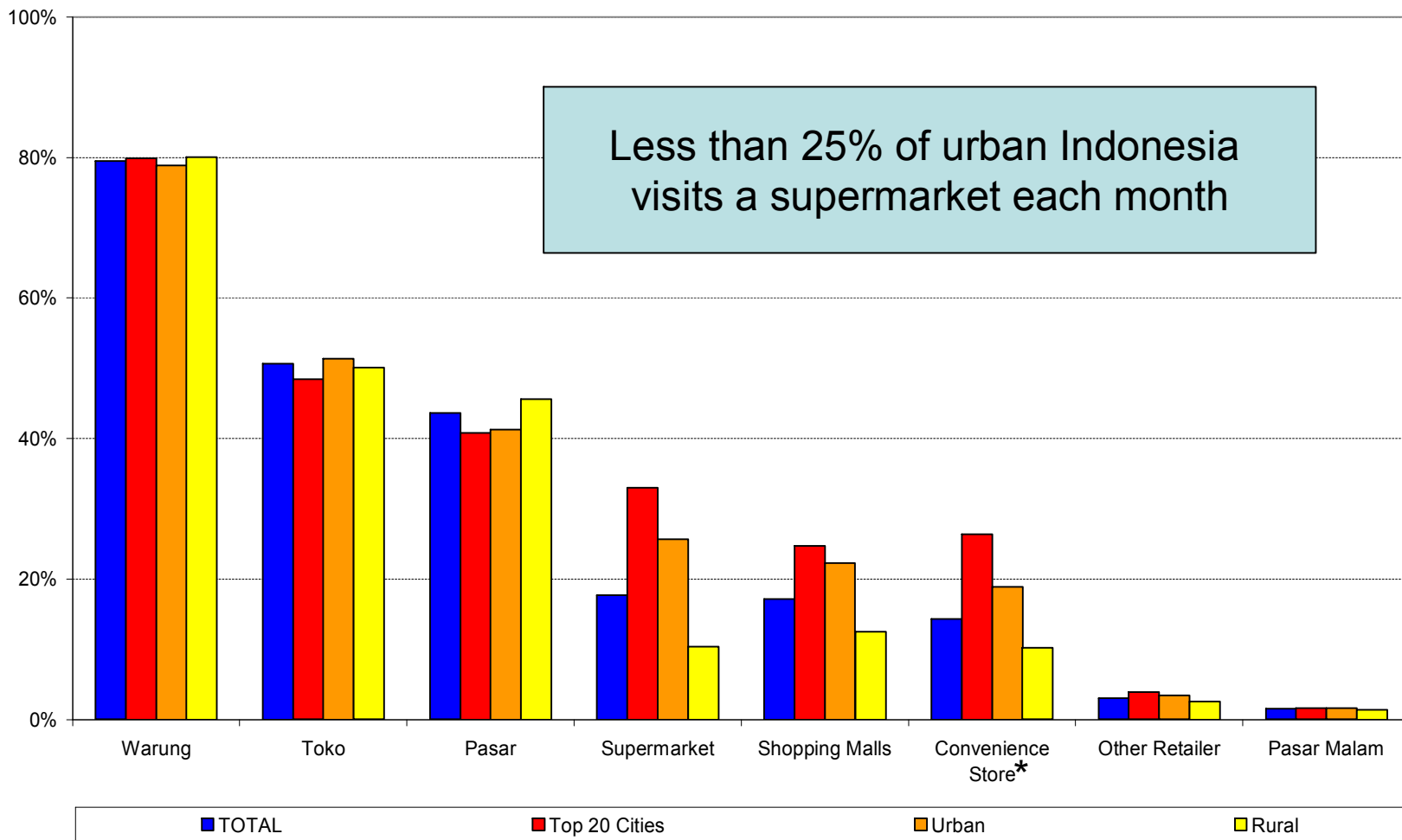


Diagnostic Capabilities:

“What impact has foreign-owned supermarkets had on grocery shopping behaviour?”

Types of Stores Visited in Last 4 Weeks

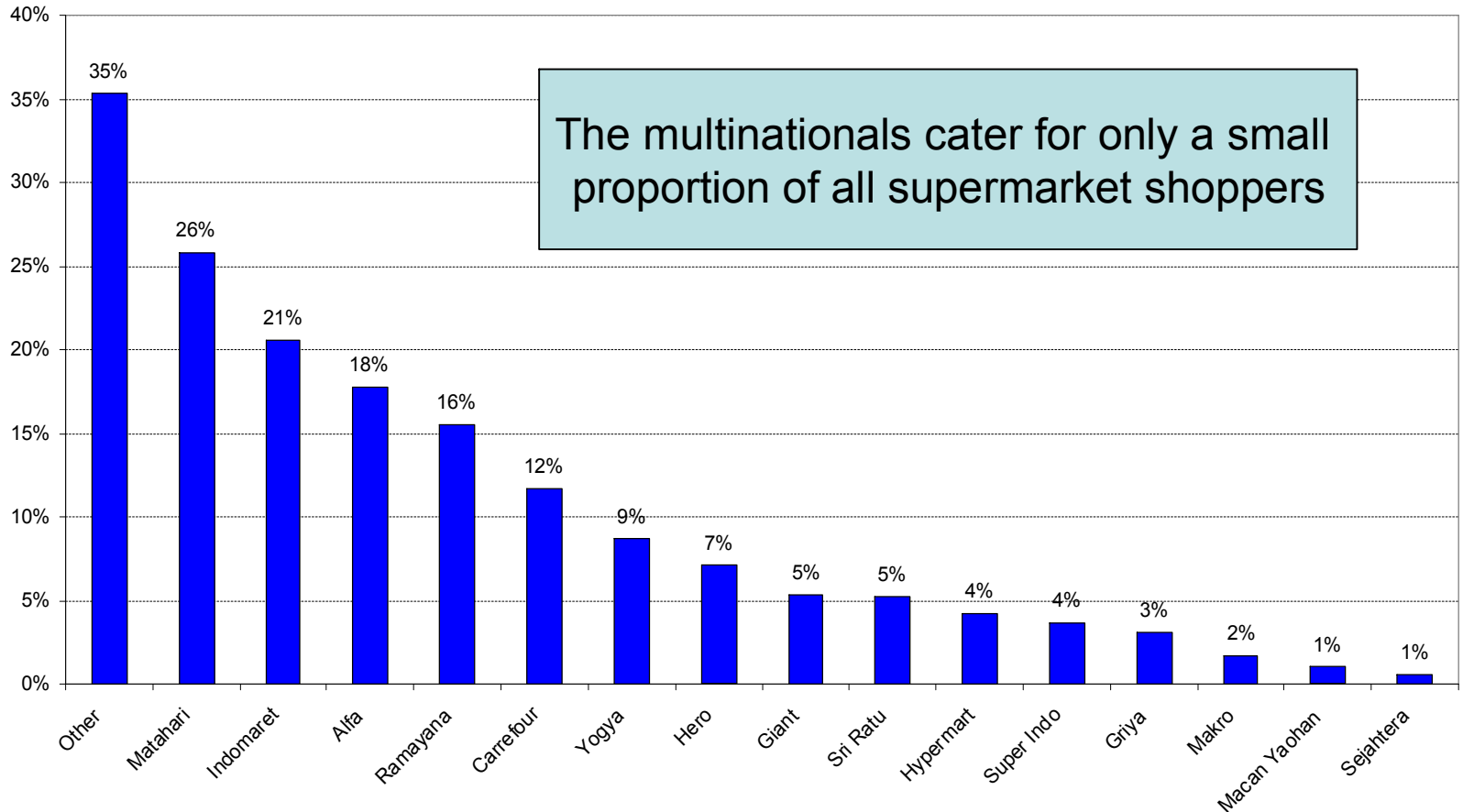
Stores and Retailers Visited in Last 4 Weeks



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Supermarket Stores where “Mainly or Sometimes Shop”: National Share

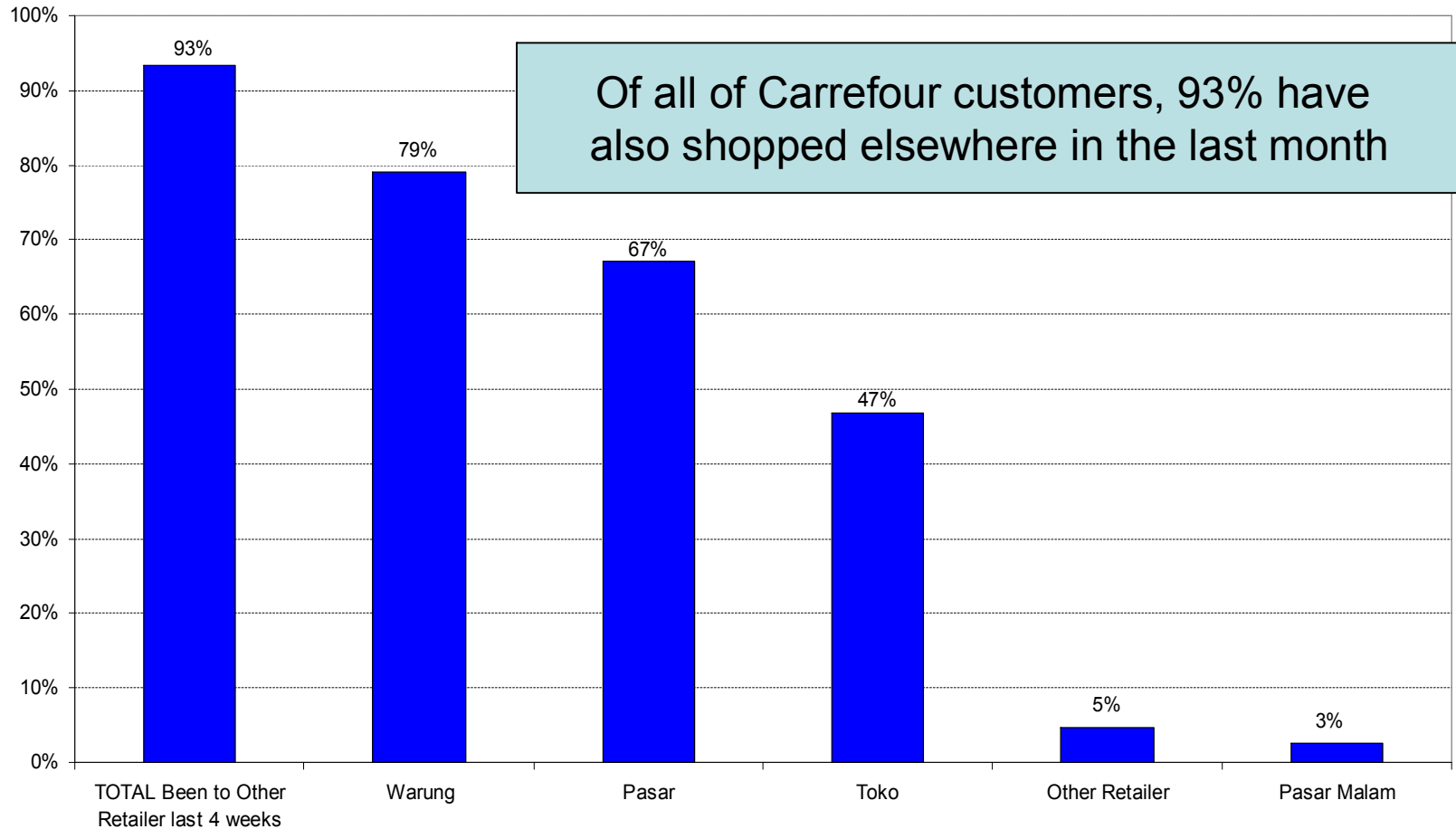
Supermarket Stores where Mainly or Sometimes Shopped
National Share



The multinationals cater for only a small proportion of all supermarket shoppers

Other Retailers Visited by Those “Mainly/Sometimes Shop at Carrefour”

Carrefour Supermarket Mainly or Sometimes Shopped
Other Retailers Visited



Source: Roy Morgan Single Source Indonesia Q1 2006
Base: Grocery Buyer who Mainly or Sometimes Shopped at Carrefour
Sample size, n= 767

Supermarkets “Mainly or Sometimes Shop At”: In Jakarta

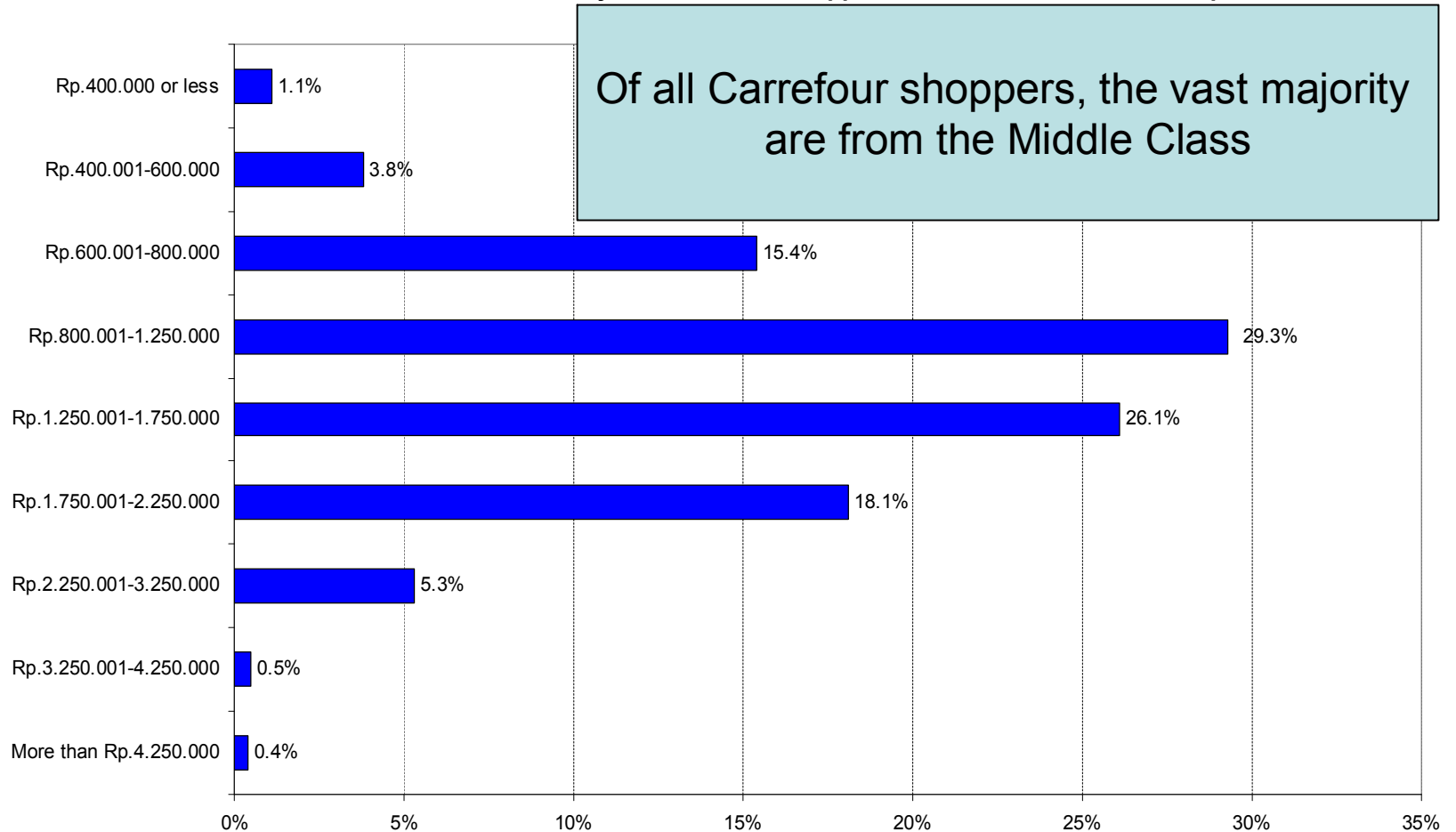
Supermarket Stores where Mainly or Sometimes Shopped
Jakarta Share



The majority of supermarket shoppers, *even in Jakarta*, patronise Indonesian-owned supermarkets

Profile of Those “Mainly/Sometimes Shop at Carrefour”: Household Expenditure

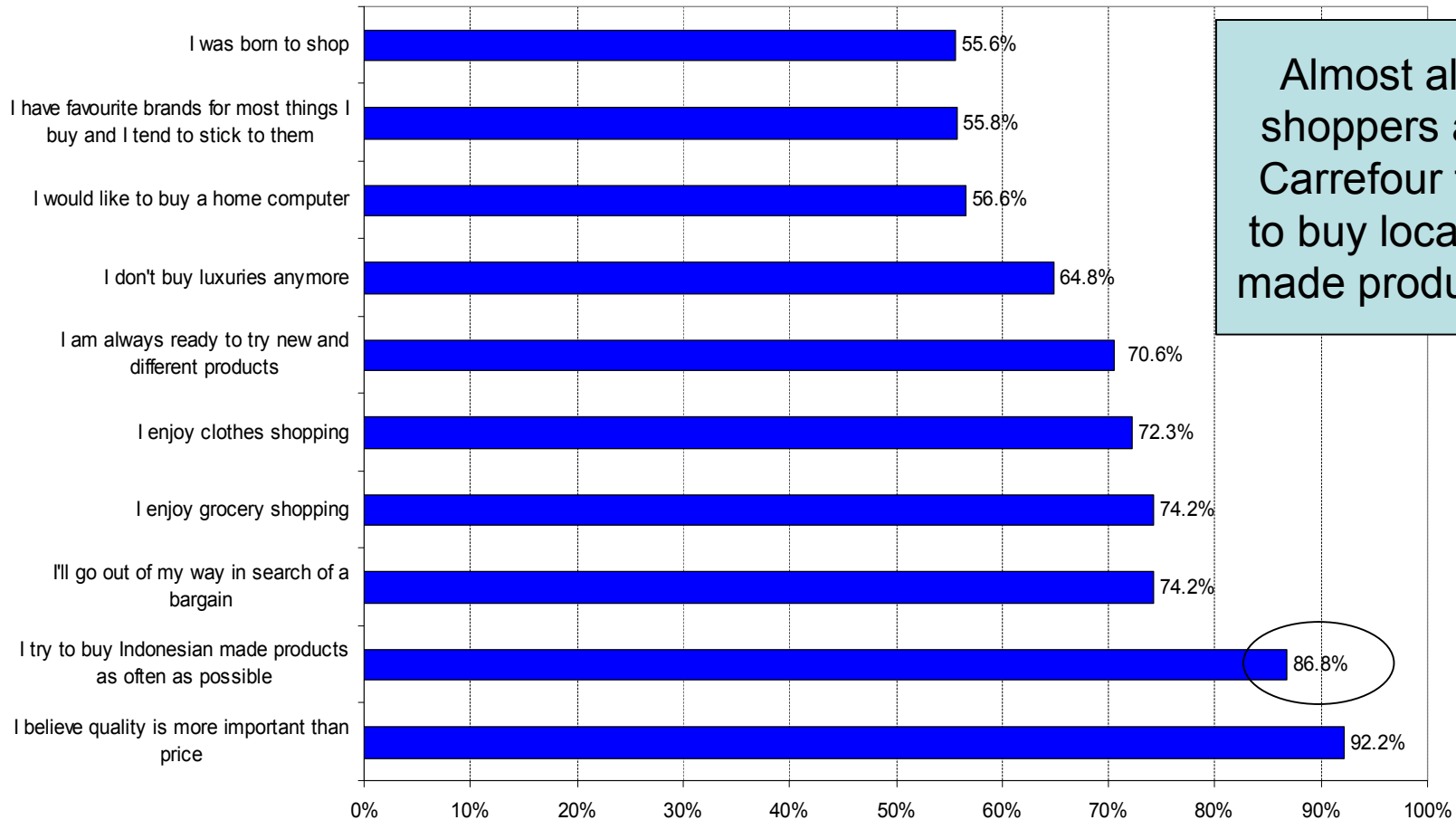
Profile of those who Mainly or Sometimes Shopped at Carrefour - Household Expenditure



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Attitudes to Shopping of those “Mainly or Sometimes Shop at Carrefour”

Profile of those who Mainly or Sometimes Shopped at Carrefour - Attitudes to Shopping

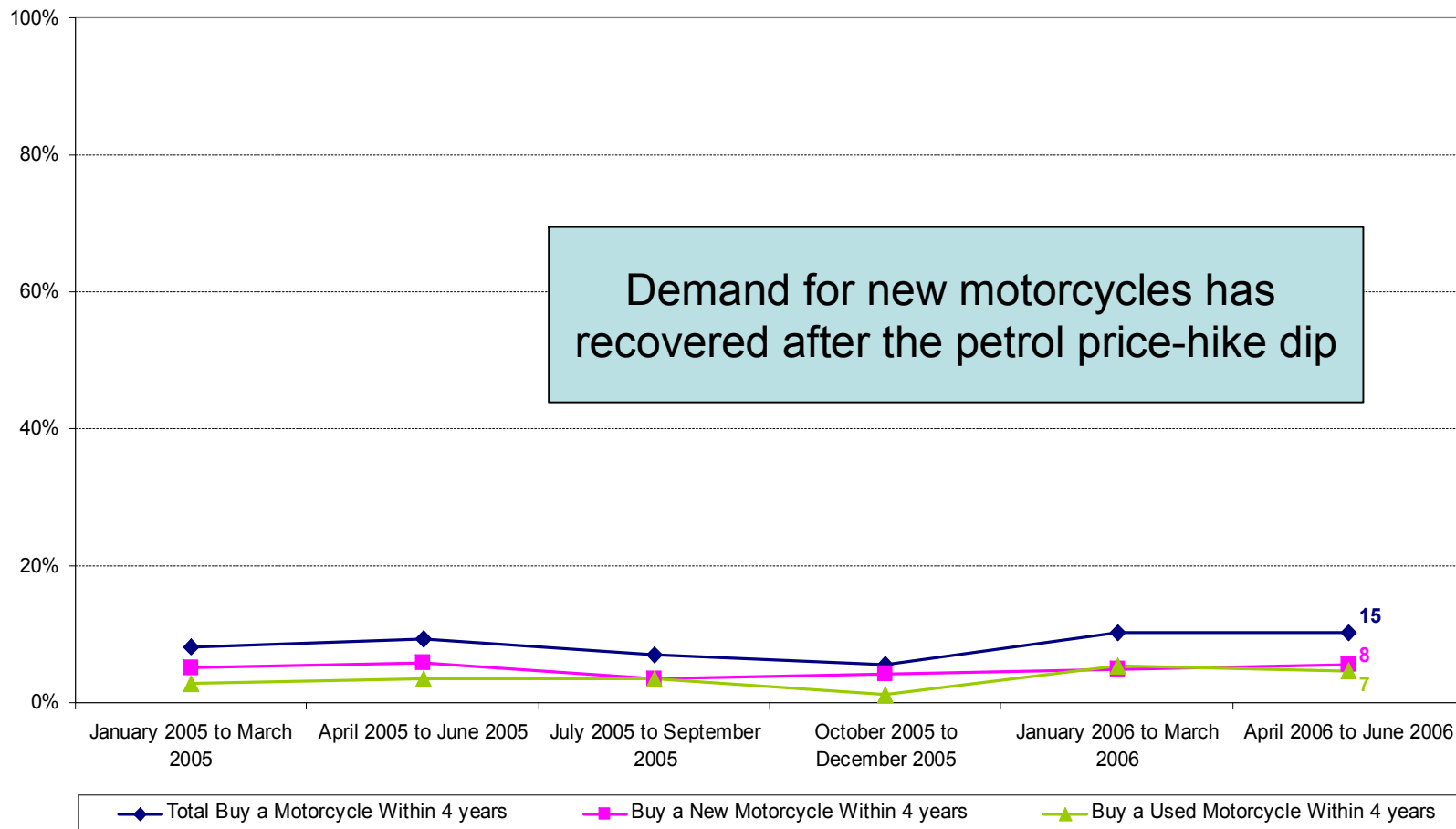


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Economic Indicators: Examples of Demand Projection

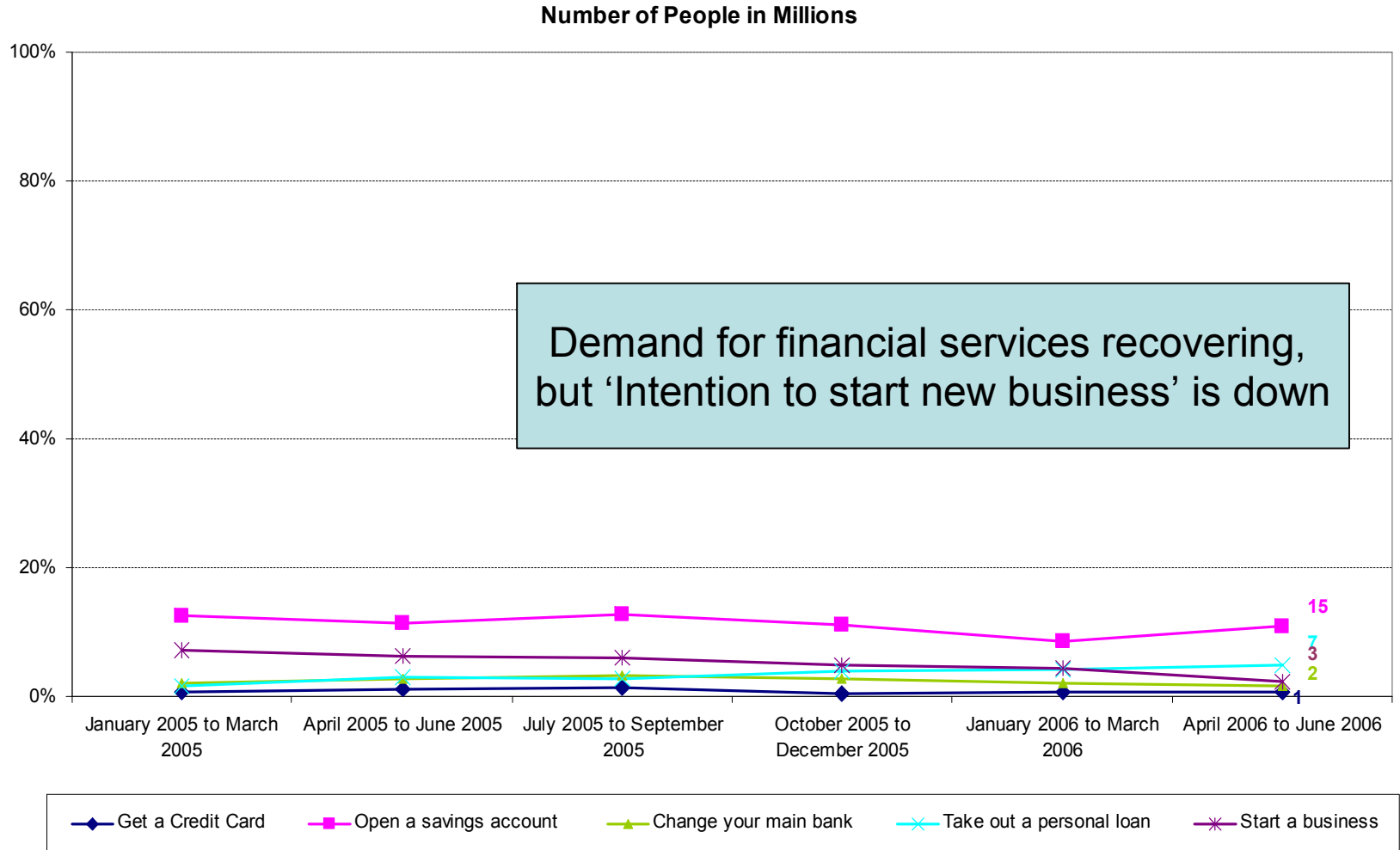
Motorcycles: Demand

Number of People in Millions

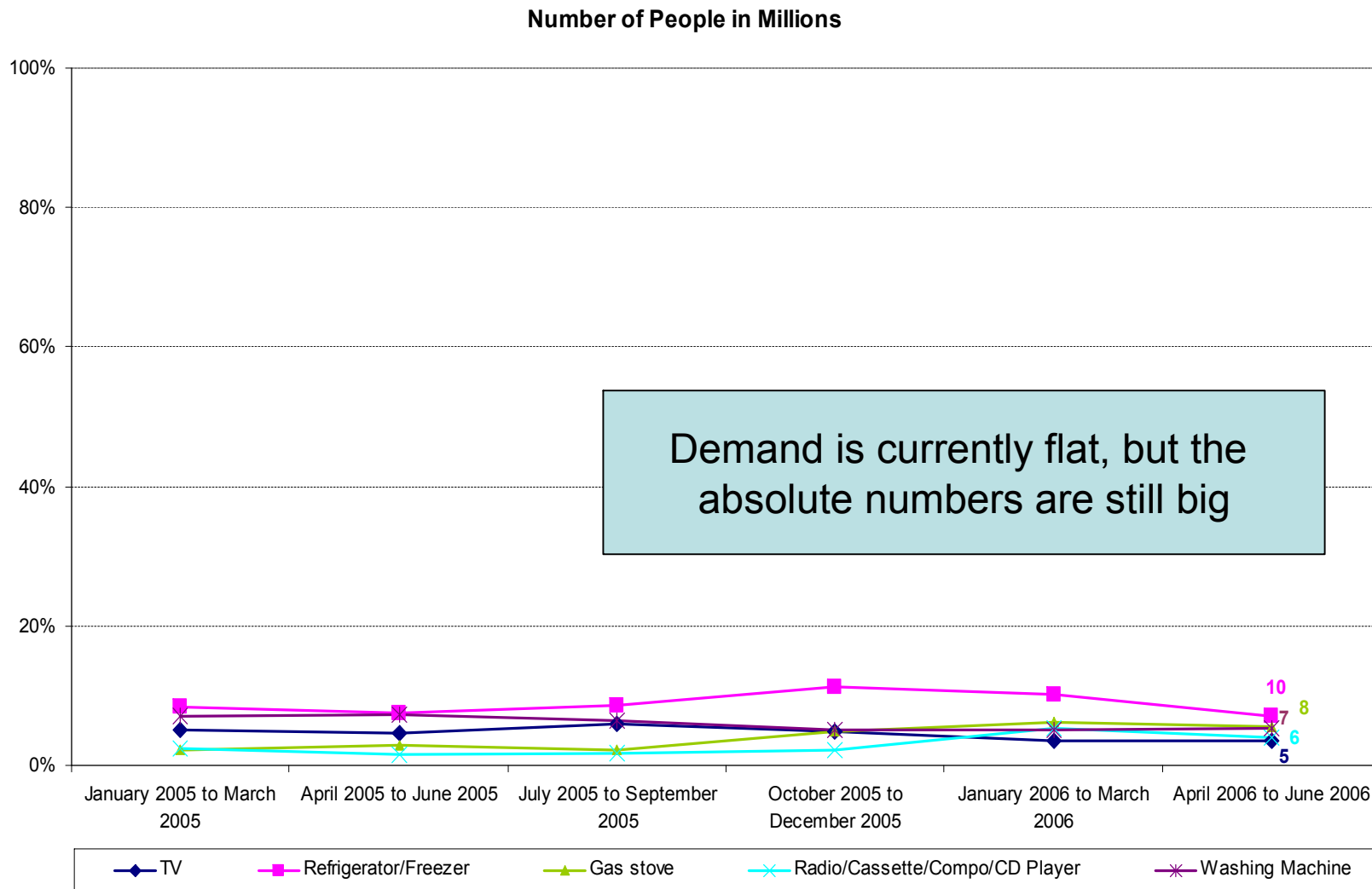


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Financial Services: Demand



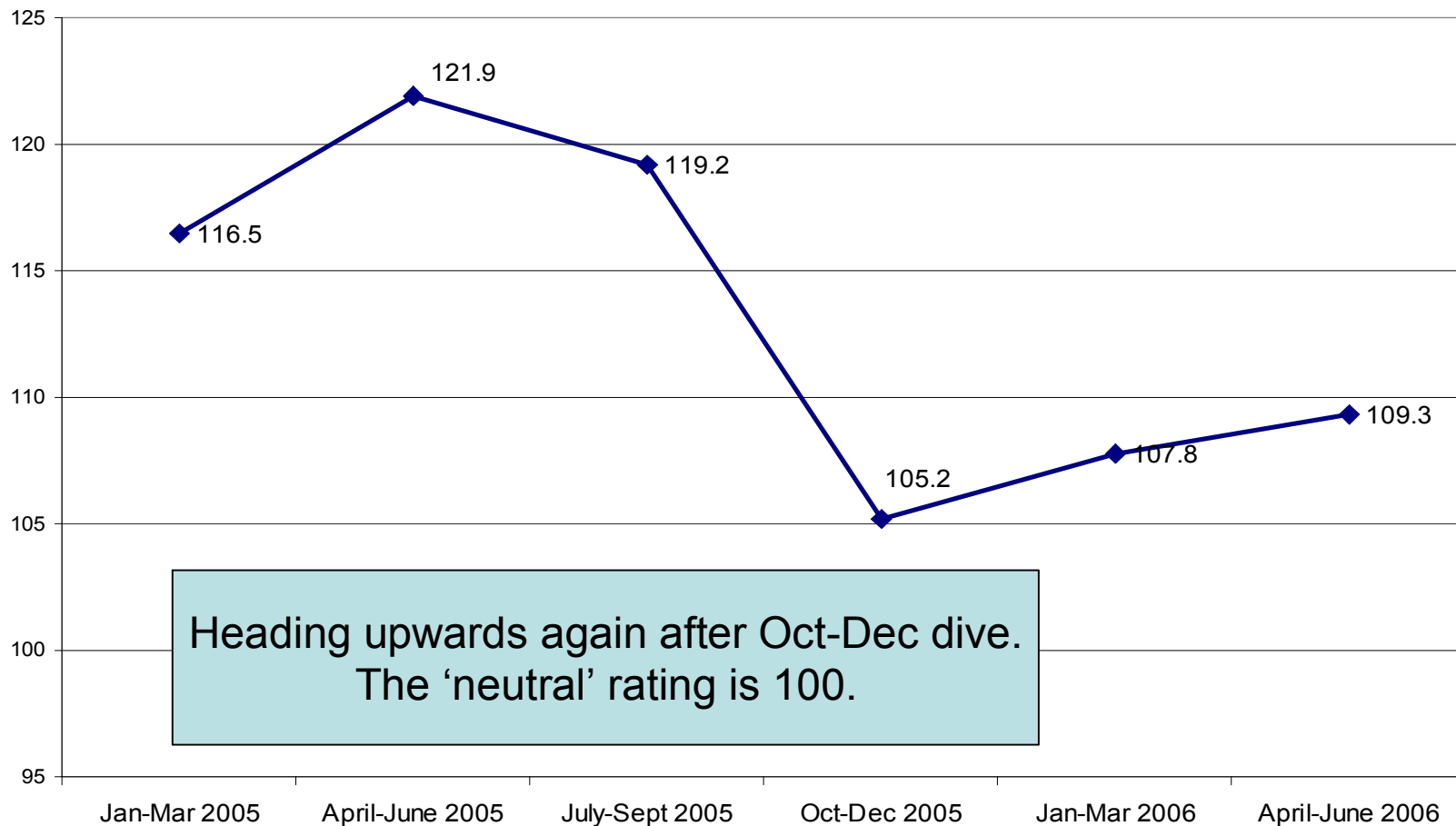
Household Appliances: Demand



Consumer Confidence

Consumer Confidence: Apr-Jun '06

Consumer Confidence in Indonesia

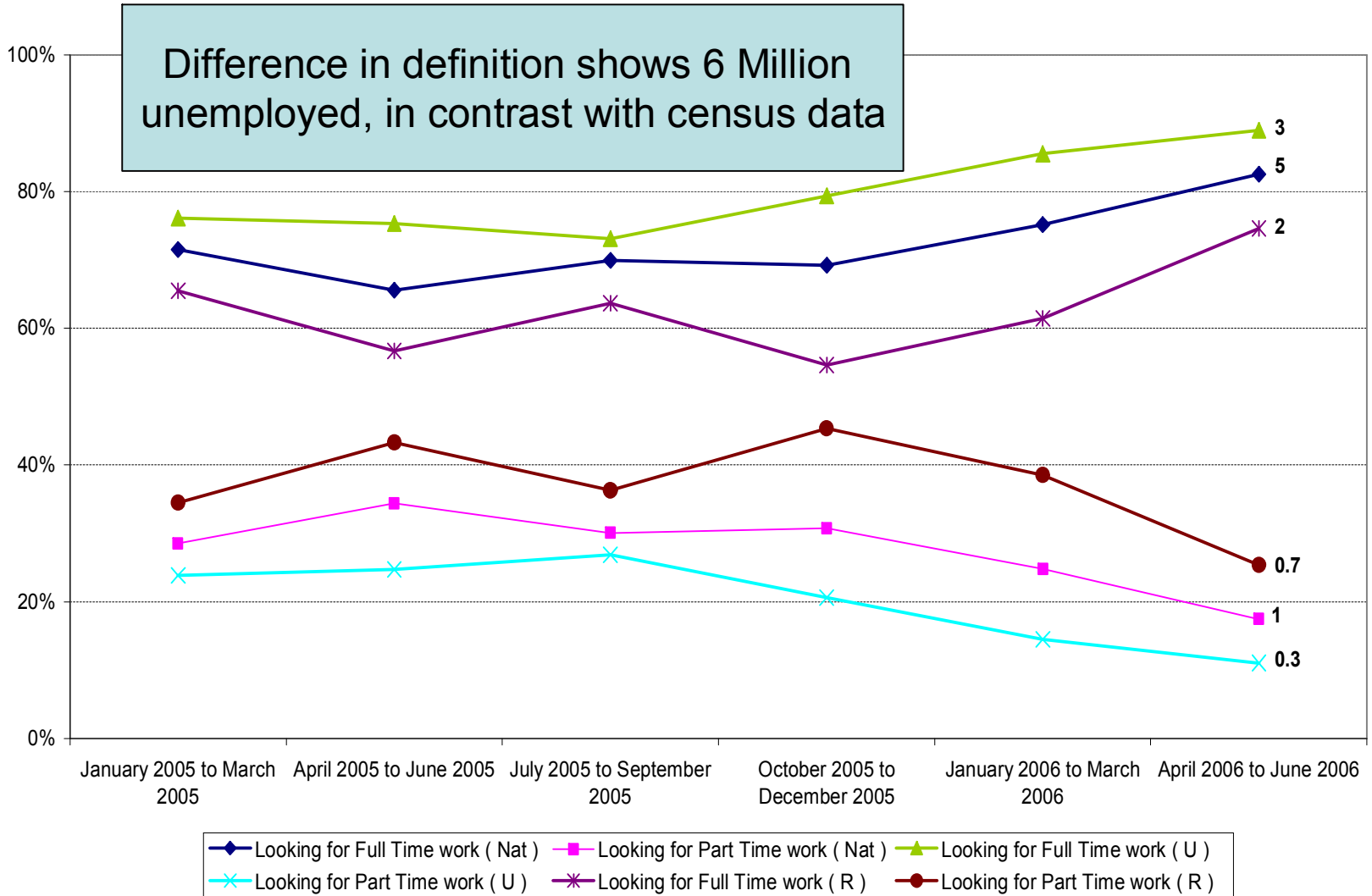


Heading upwards again after Oct-Dec dive.
The 'neutral' rating is 100.

Unemployment & Poverty

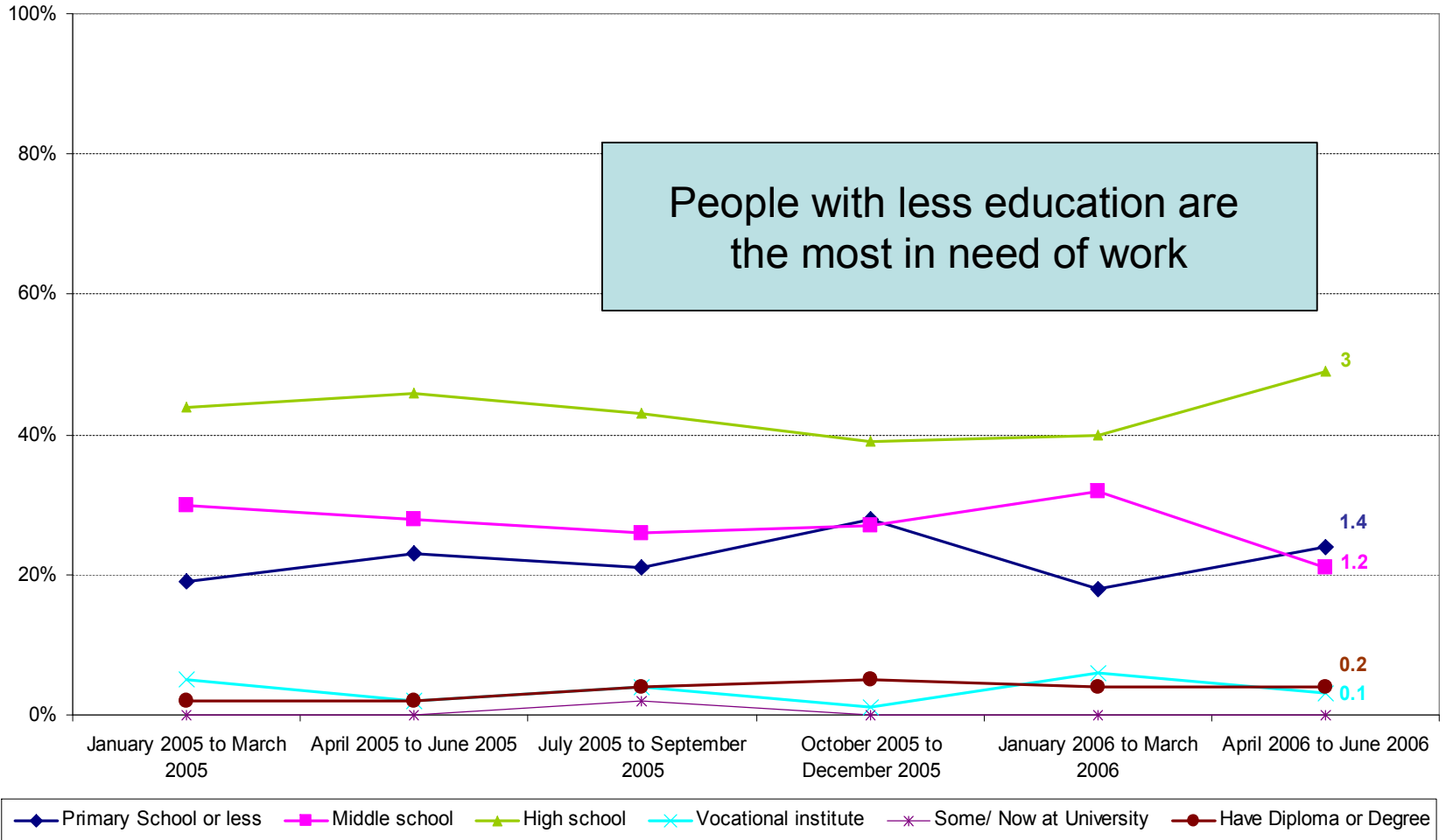
“Looking For Work”: By Urban, Rural

% of People Looking for Work in National, Urban, Rural Regions. No. of People in Millions



“Looking For Work”: By Education Level

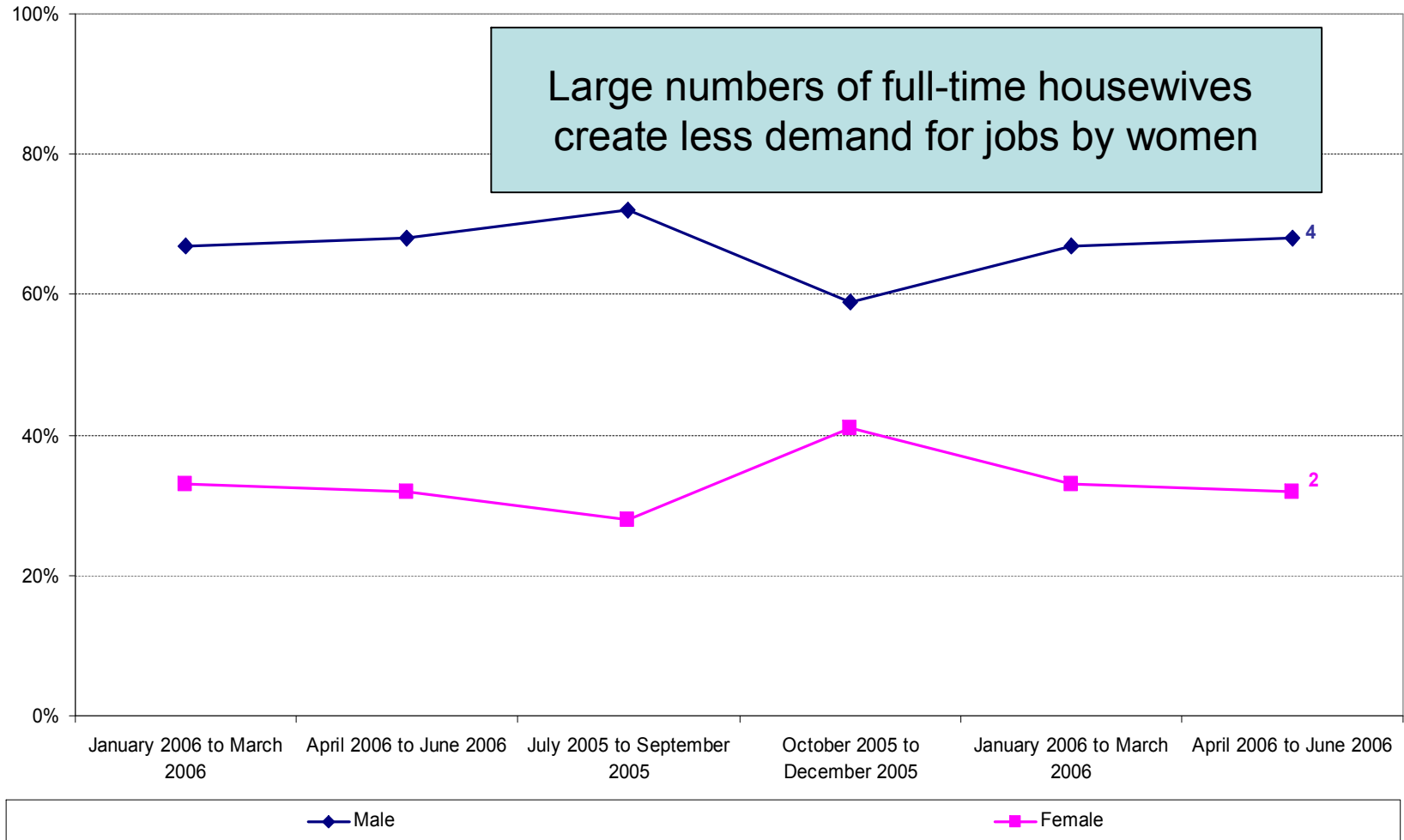
Number of People Looking for Work in Millions



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“Looking For Work”: By Gender

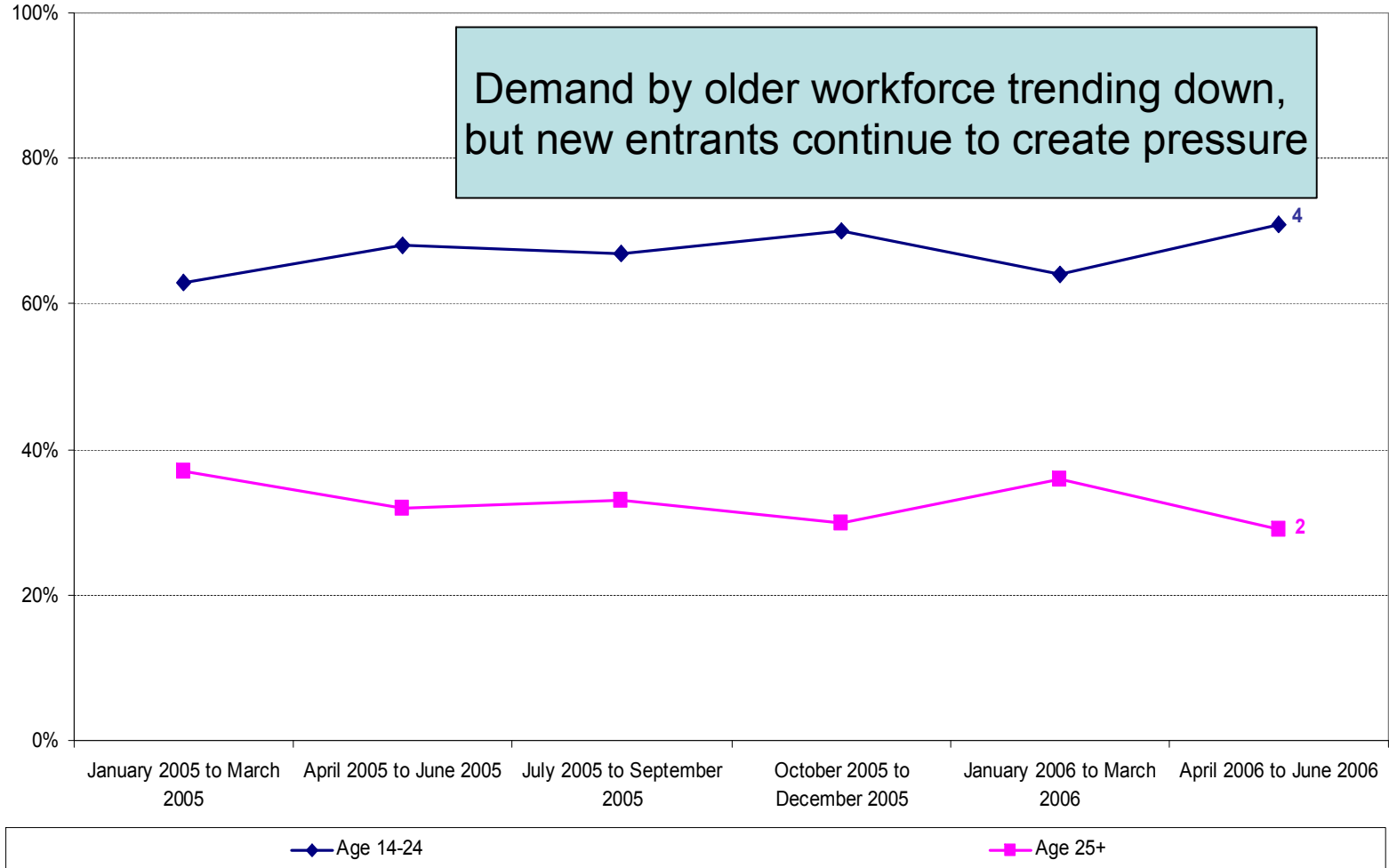
Number of People Looking for Work in Millions



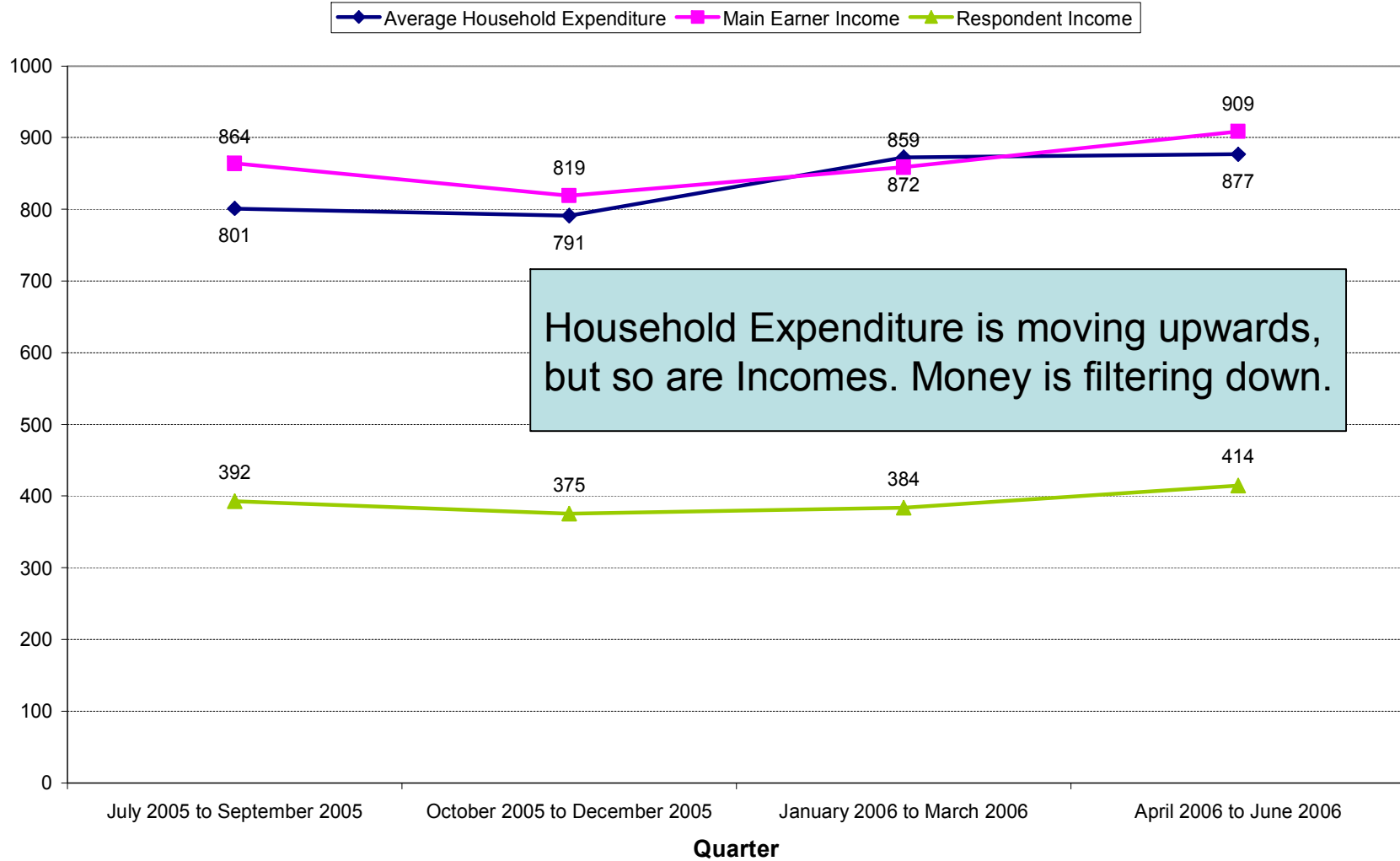
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“Looking for Work”: By Age

Number of People Looking for Work in Millions

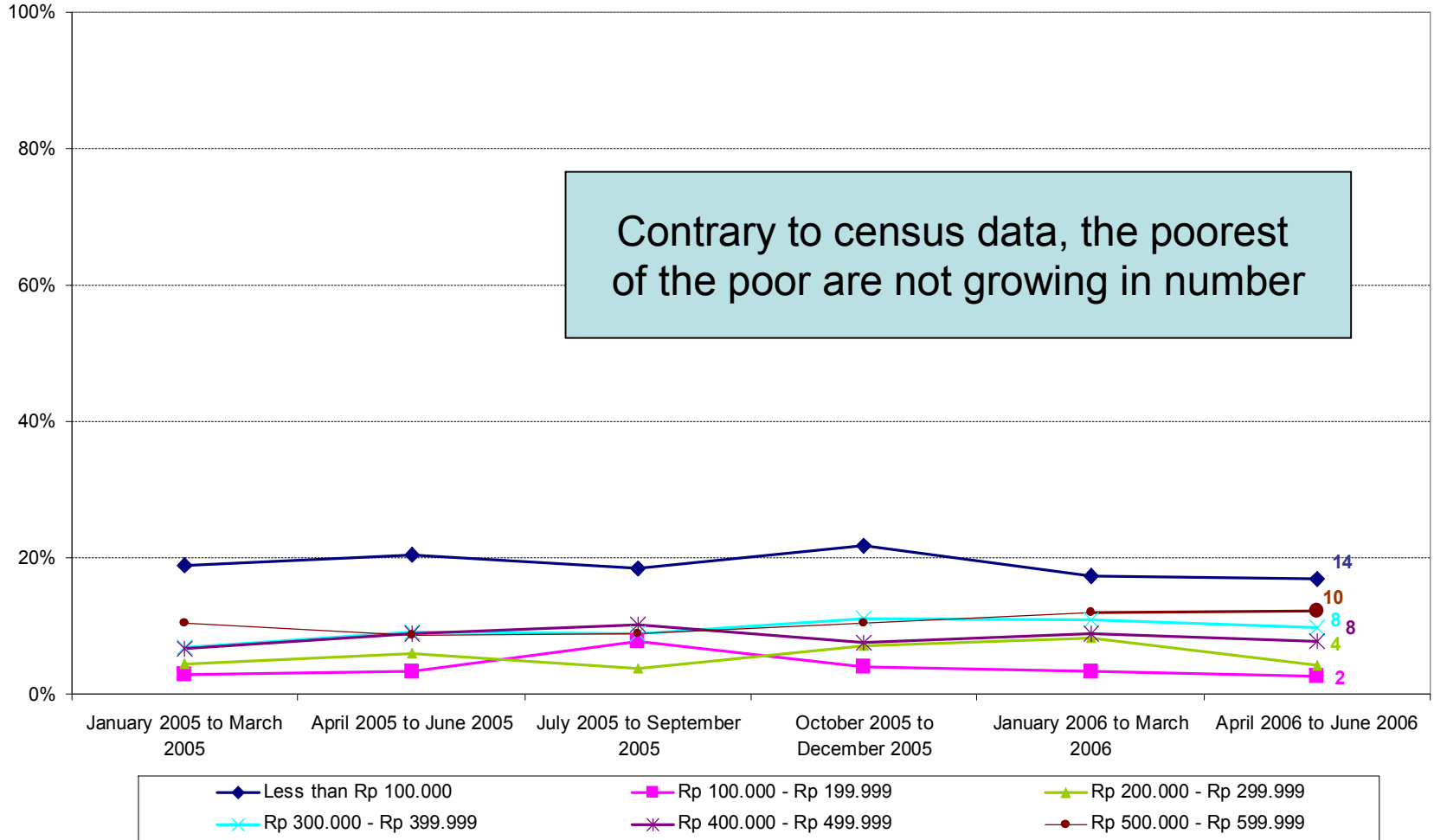


Income & Expenditure: National Average



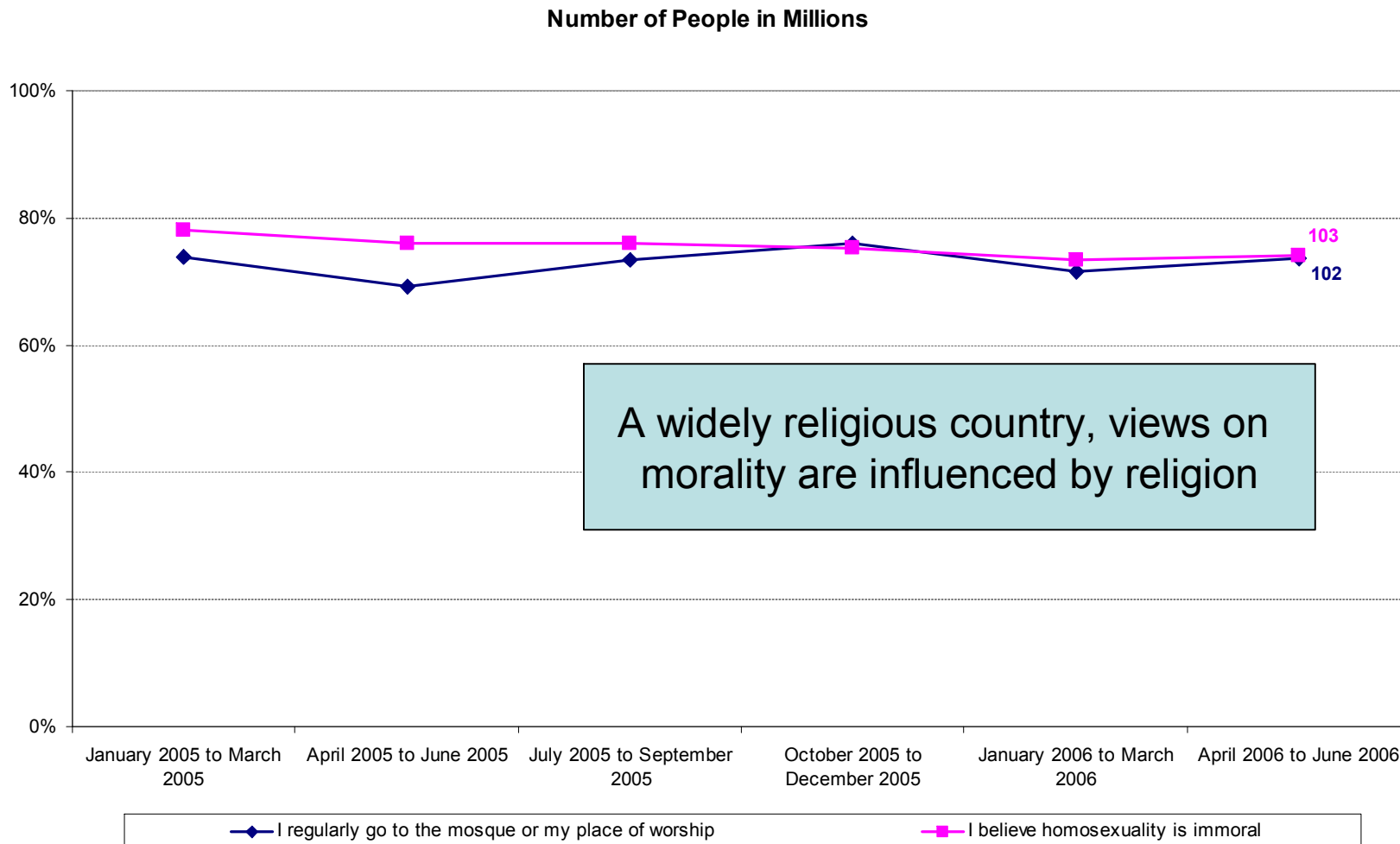
Low Income Groups: Respondent Income

Number of People, excluding Students, Housewives, Retirees in Millions

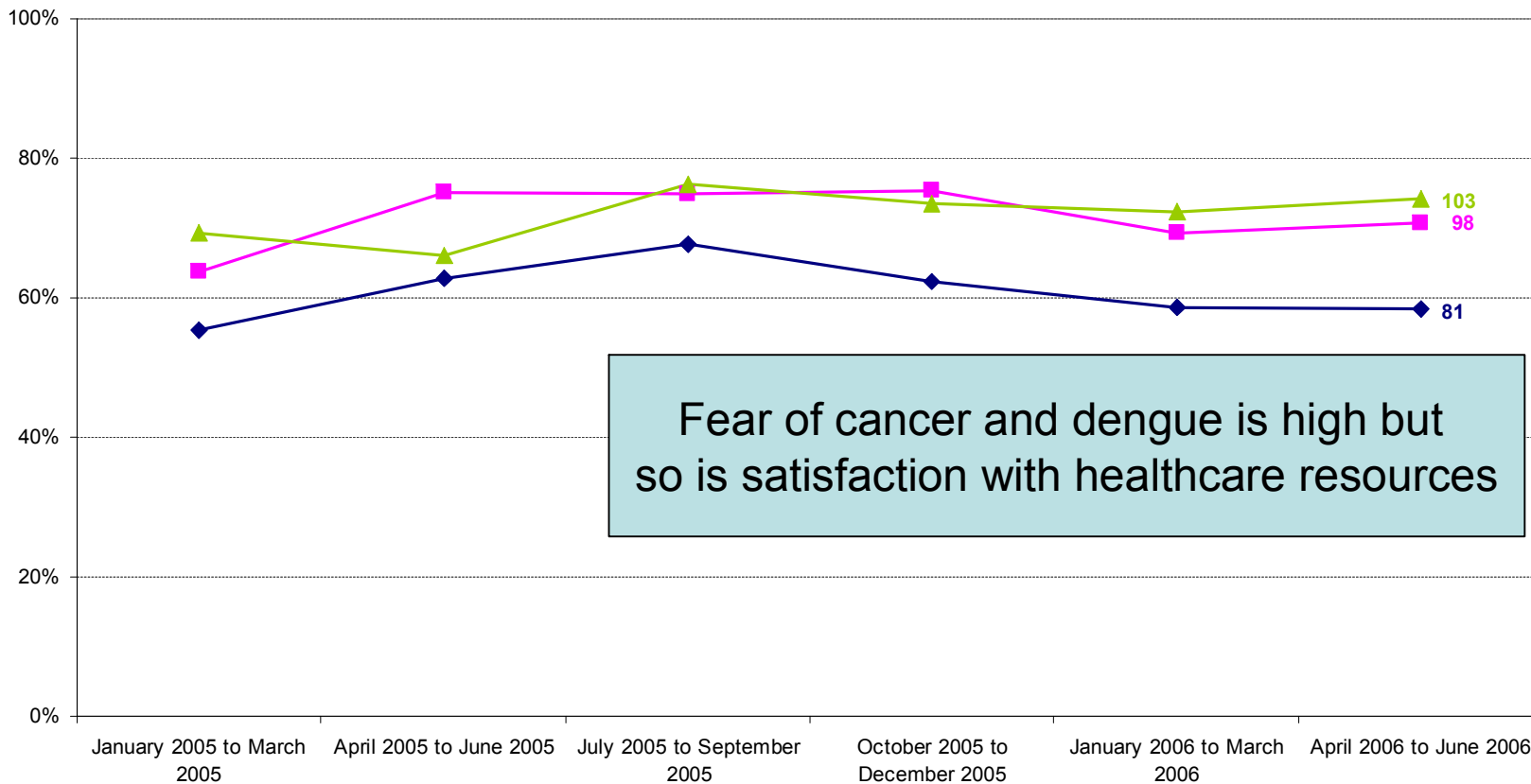


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Social Issues: Examples



Number of People in Millions

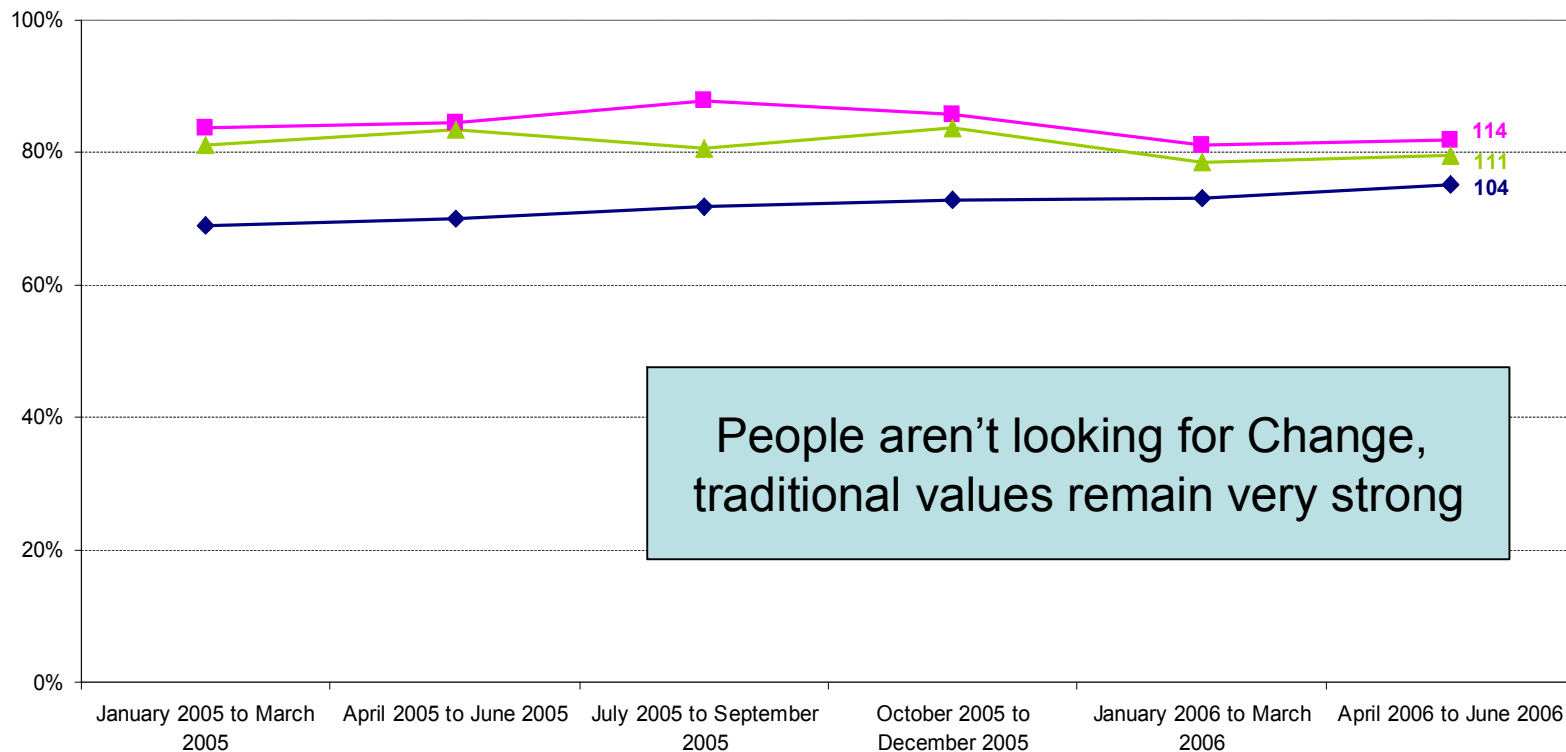


Fear of cancer and dengue is high but so is satisfaction with healthcare resources

◆ I worry about getting skin cancer ■ I worry about getting Dengue Fever ▲ If I had an accident, the local hospital would provide me with adequate treatment

Social Attitudes

Number of People in Millions

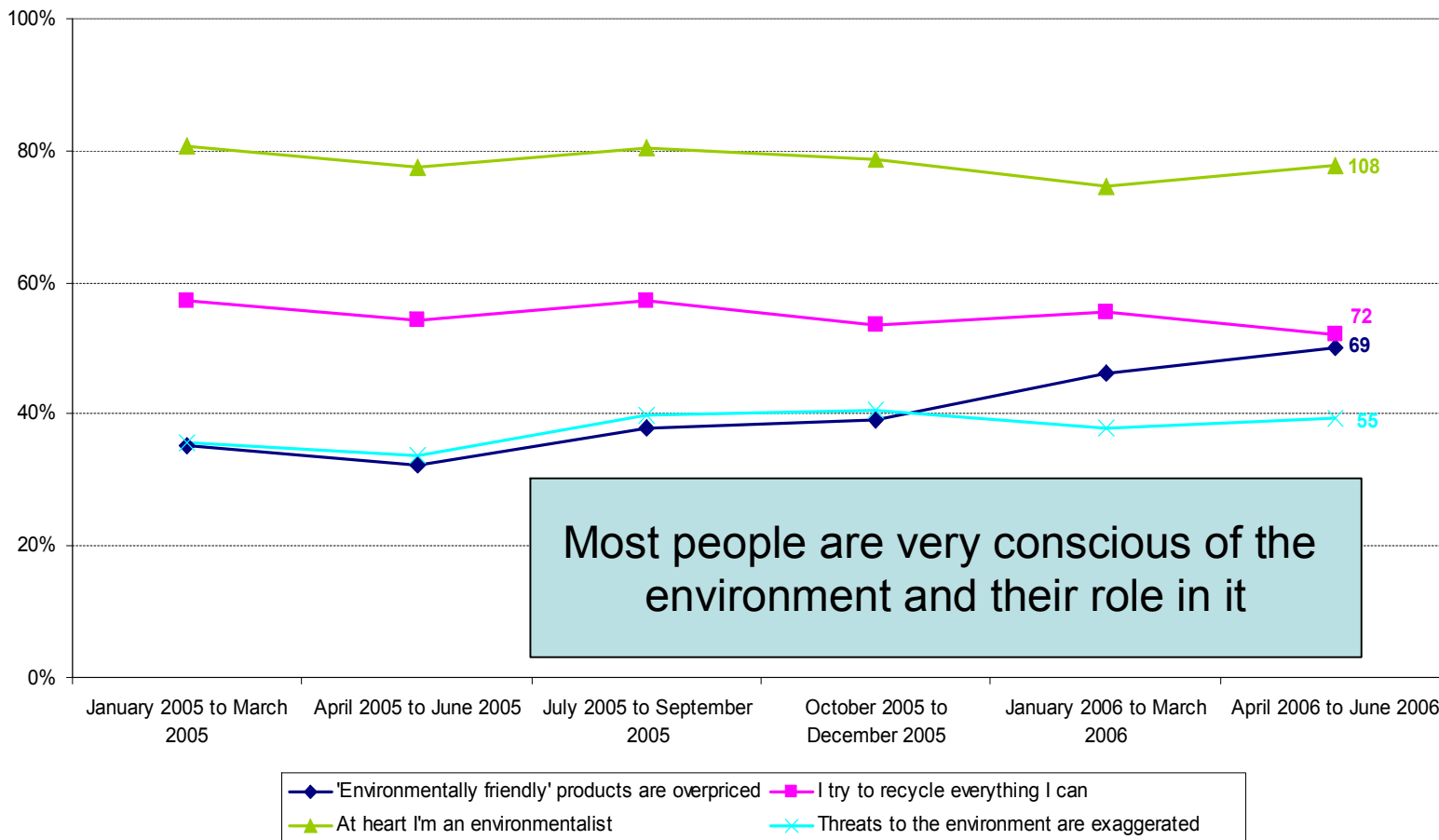


People aren't looking for Change,
traditional values remain very strong

- ◆ The fundamental values of our society are under serious threat
- Obedience and respect for authority are the most important virtues children should learn
- ▲ There's too much change going on these days

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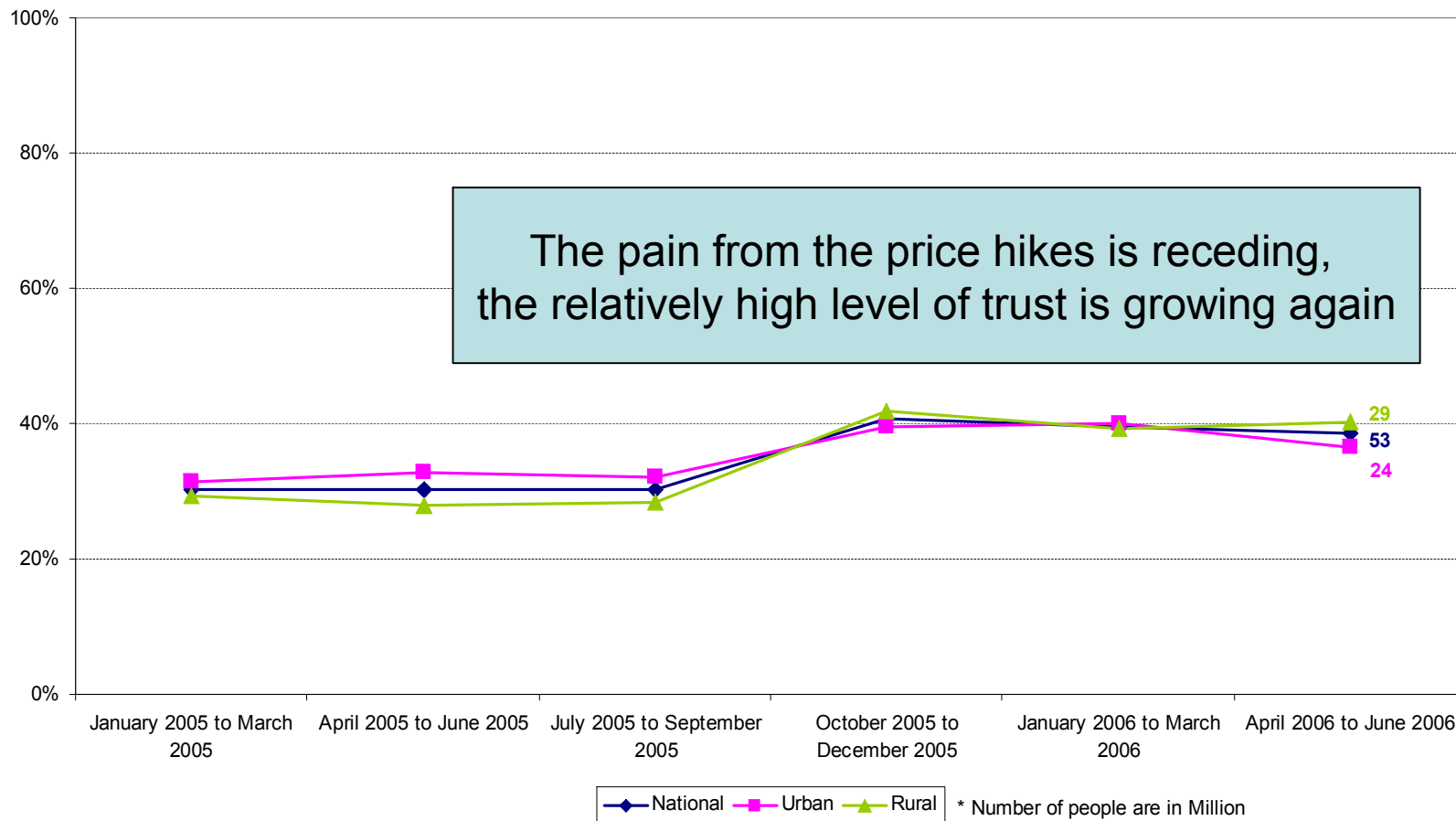
Number of People in Millions



Most people are very conscious of the environment and their role in it

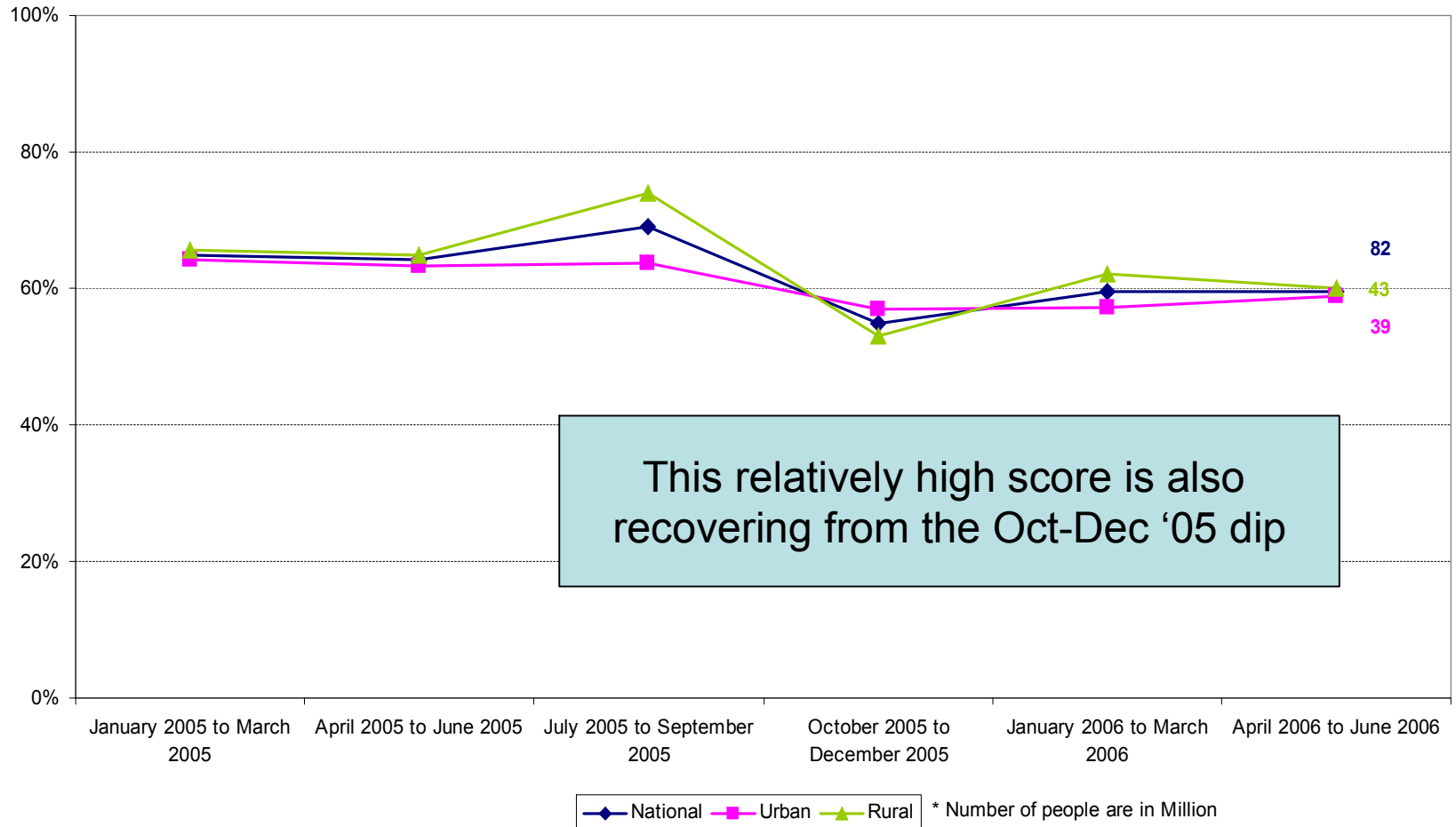
Political Issues: Examples

"I don't trust the current Government"



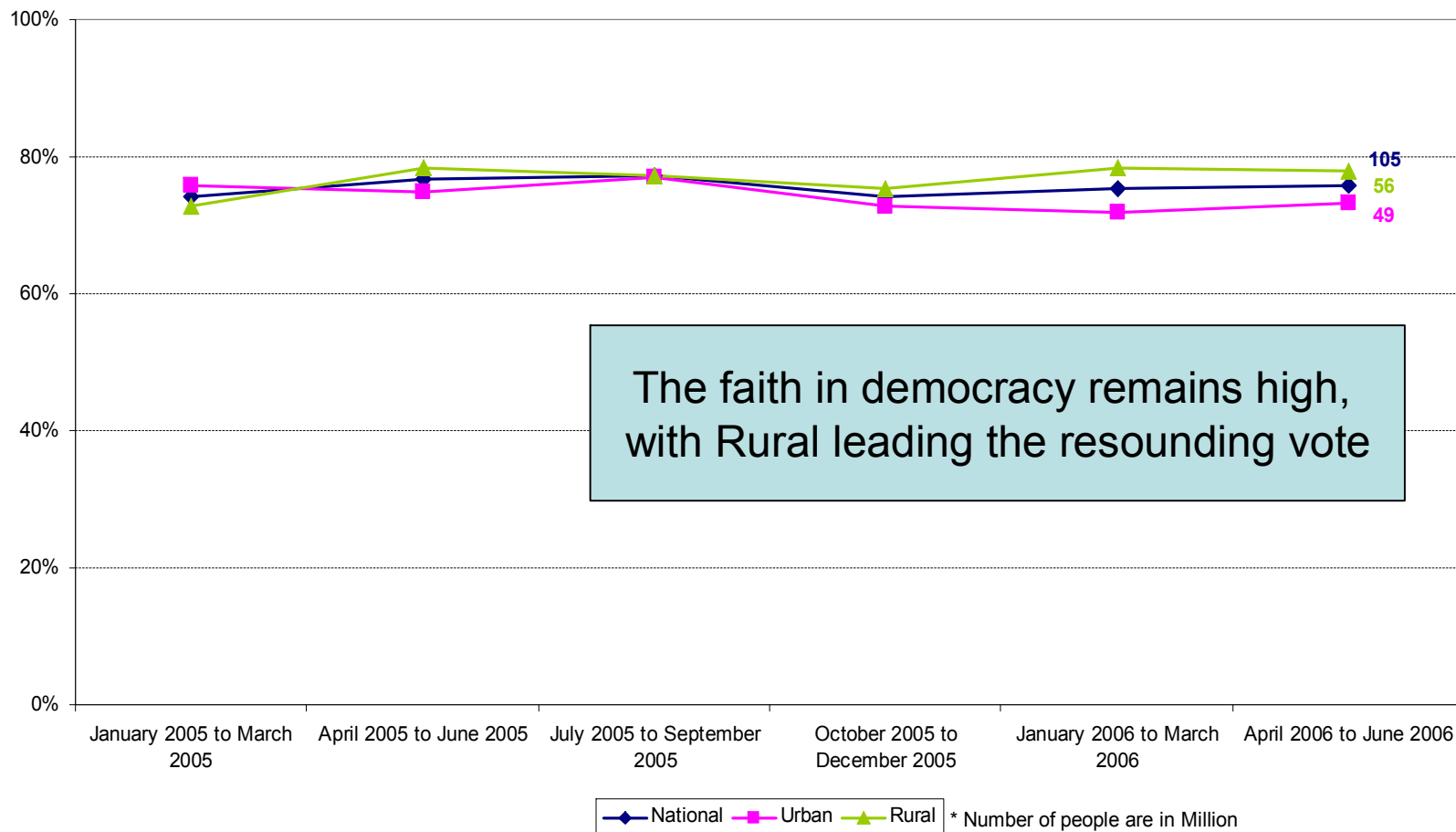
Running the Country

"The Government is doing a good job running the country"

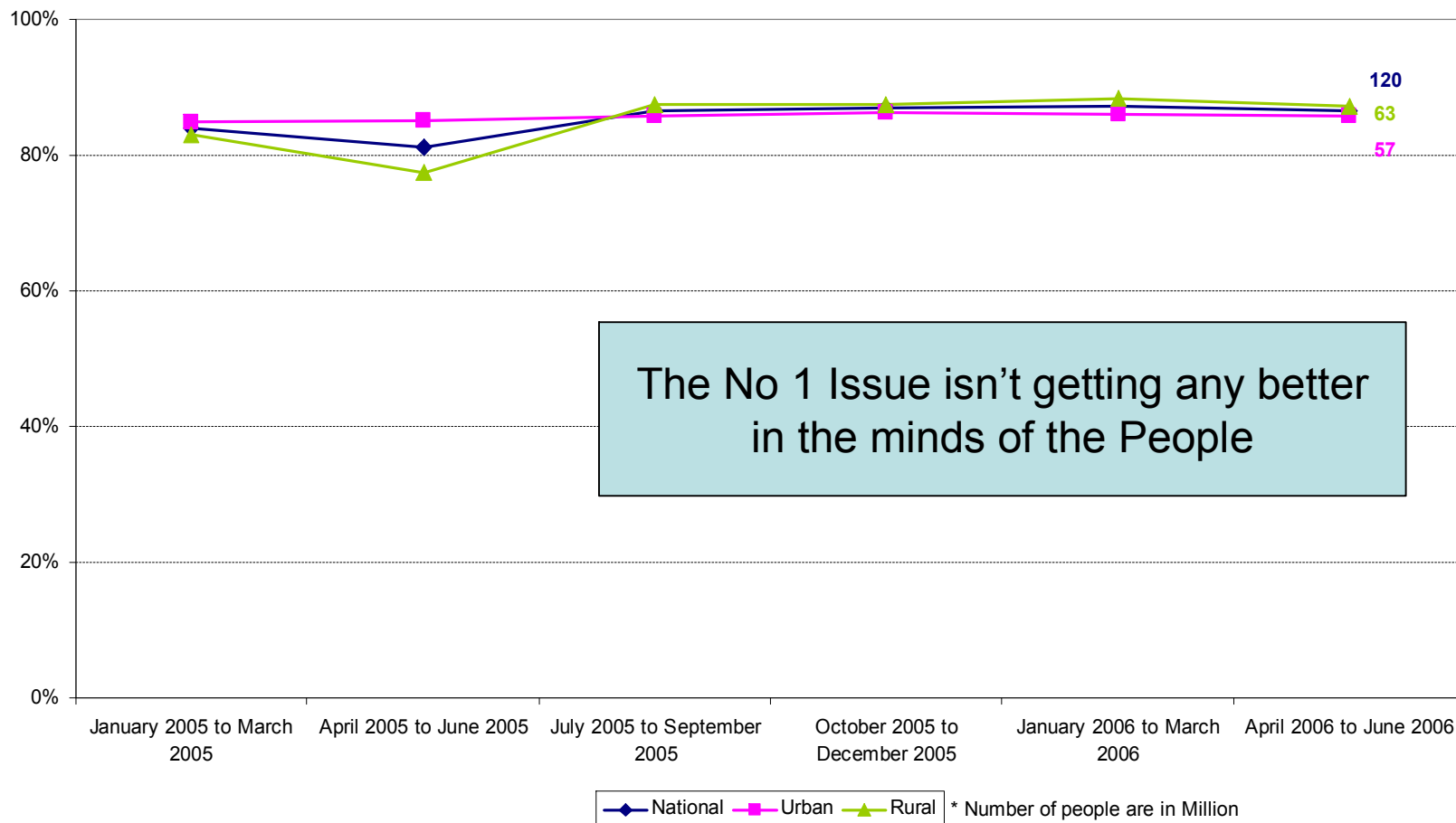


This relatively high score is also recovering from the Oct-Dec '05 dip

"Democracy is working in Indonesia"



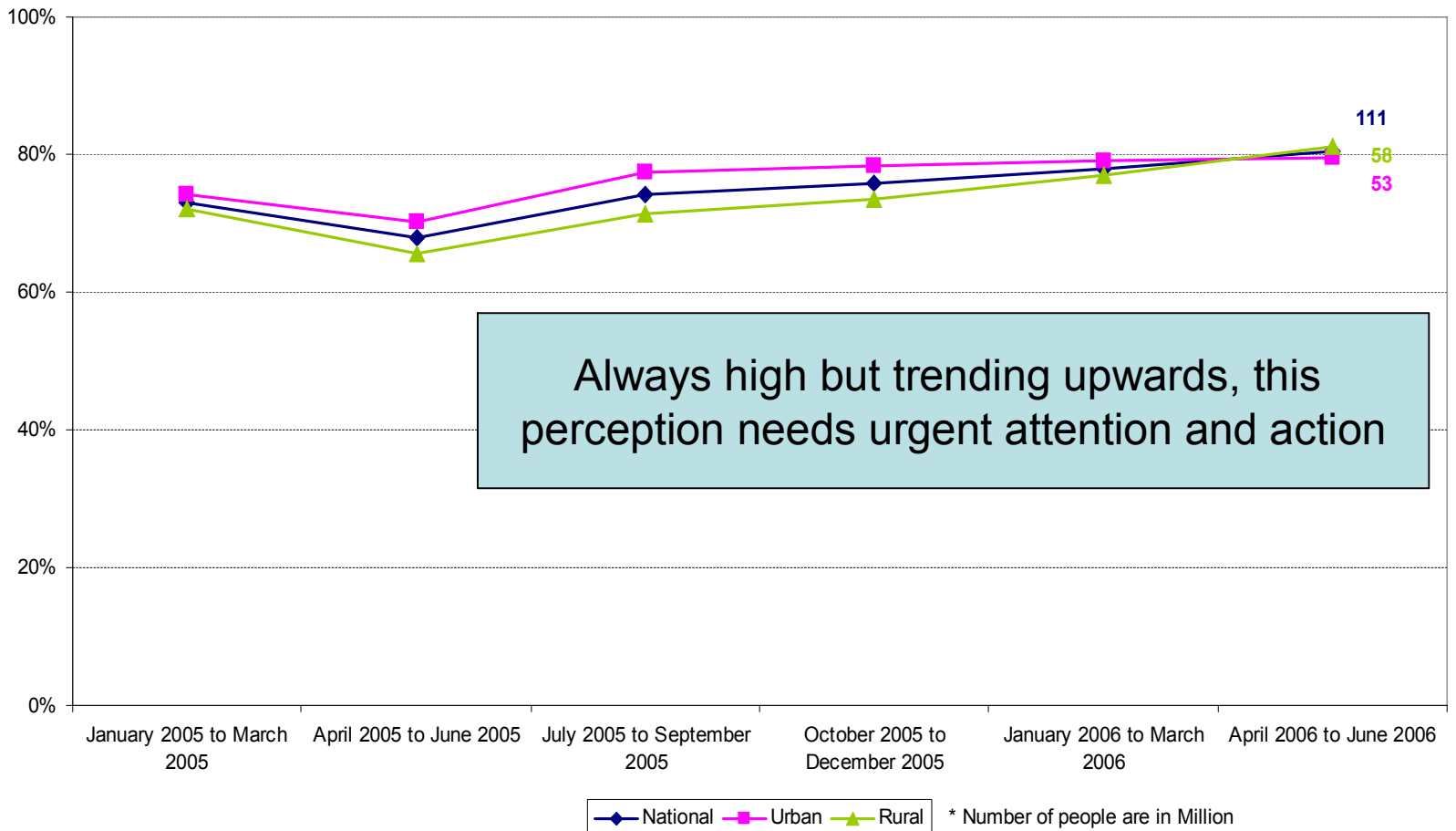
"Corruption is one of the major problems facing this country"



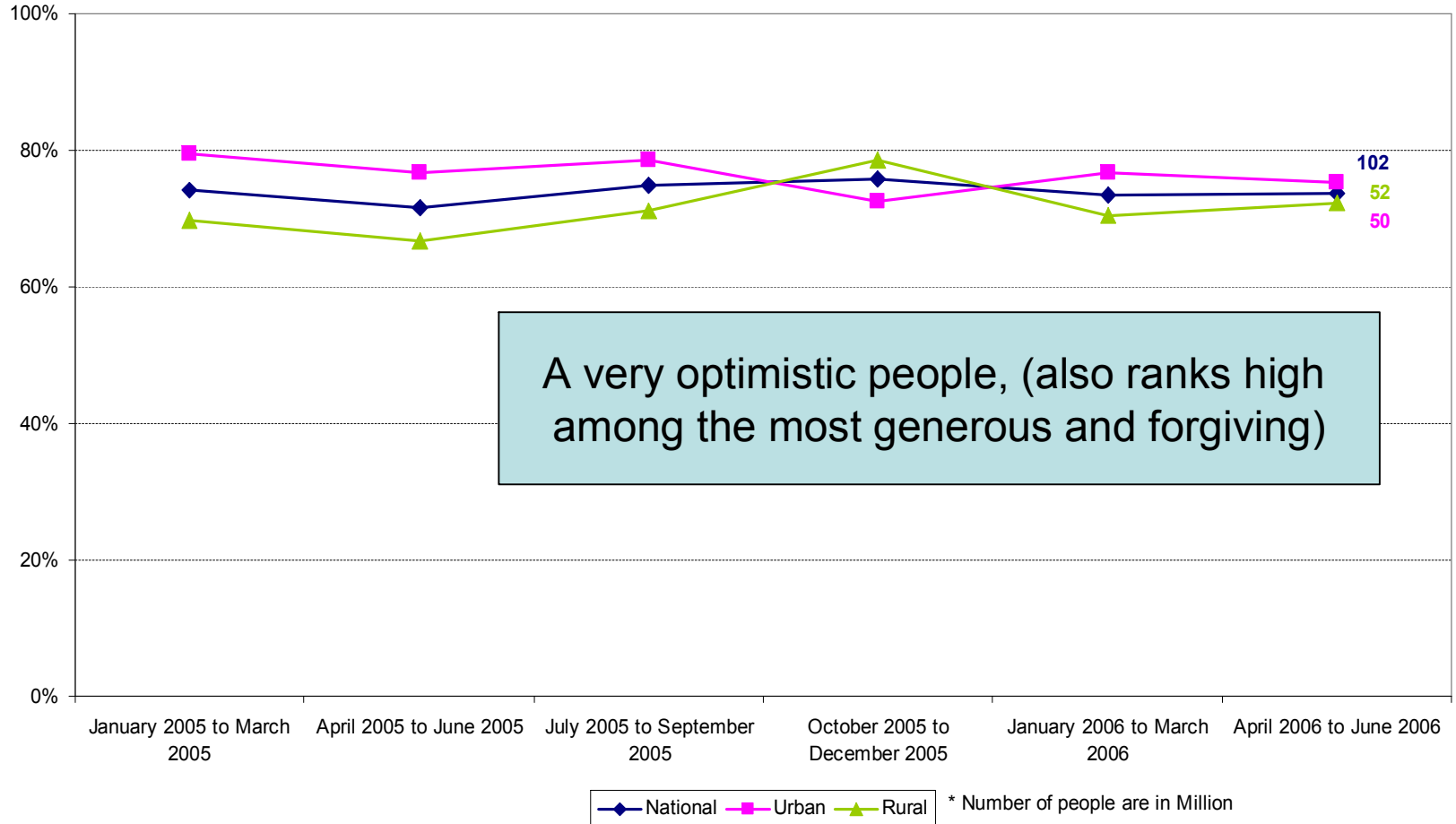
The No 1 Issue isn't getting any better
in the minds of the People

Rich Vs Poor

"I think the gap between rich and poor is growing"

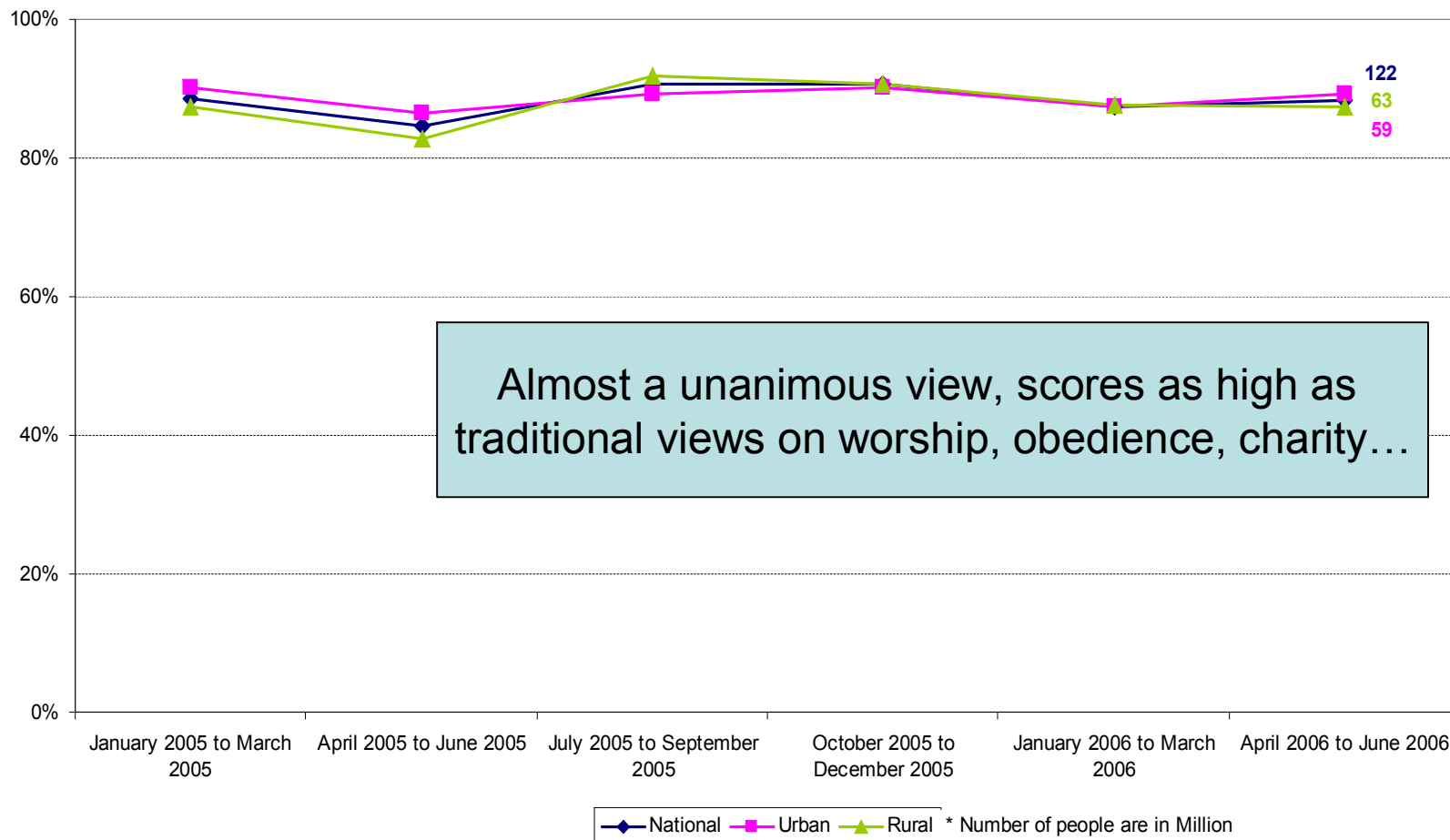


"I'm optimistic about the future"



Support for the Jobless

"I think it is the Government's duty to support those who can't find work"



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Only God Knows What Goes On In
Indonesia, Everyday. (Try asking Him).

*Every 90 Days, We Know Quite A Bit.
(And We're More Interactive!)*