

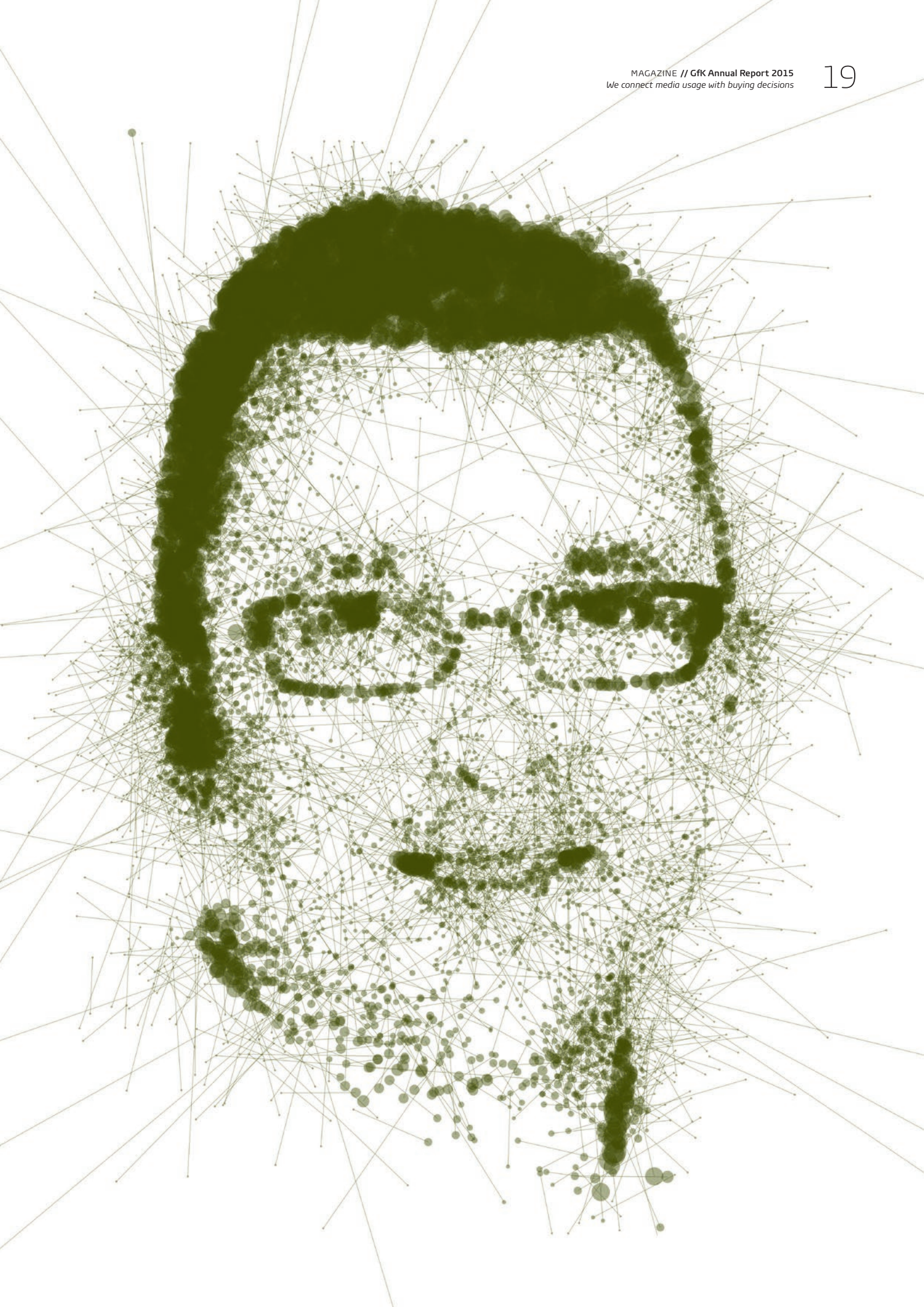


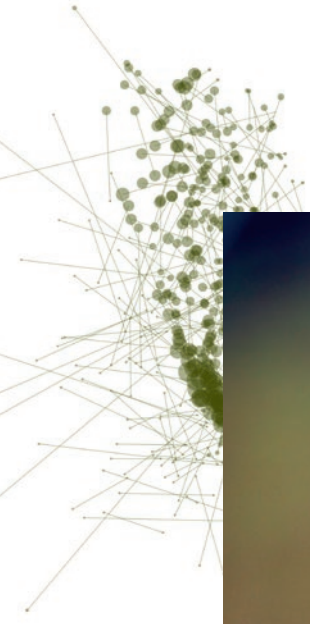
WE CONNECT
MEDIA USAGE
WITH
BUYING
DECISIONS

How will we communicate in the future? What exactly does “mobile first” mean? And how does media usage translate into buying decisions?

To answer these questions, it helps if we take a look at Indonesia. By drawing on the example of the fourth biggest market in the world, we can see how mobile media will affect us in the future.

And GfK is at the forefront of these developments.







**»INDONESIA IS A
MOBILE-FIRST MARKET WHERE
ONLINE ACCESS IS ALMOST EXCLUSIVELY
VIA SMARTPHONE.«**

STEFAN HEREMANS
Product Head GfK Crossmedia Link

Jakarta with its millions of inhabitants and the German city of Nuremberg are separated by the Indian Ocean, more than a dozen national borders and a total of over 10,000 partly mountainous, partly desert-like kilometers. Nonetheless, there is a very direct connection from GfK headquarters to the Far East and back. Indonesia is currently an excellent example of how Europeans will communicate and consume in the future. The analysis of these everyday practices is based on a technology developed by GfK's market researchers and provides customers worldwide with unique insights. Its name: GfK Crossmedia Link.

ON THE TRACKS OF DIGITAL CONSUMERS

The complete measurement of TV, print, online and mobile media usage from a single source is at the core of the GfK Crossmedia Link panel. GfK Crossmedia Link not only provides in-depth insights into usage habits regarding specific media but also how they relate to each other. When and how often do users change from a desktop to a smartphone (and vice versa)? Where do they get information and which medium do they use to buy things? GfK Crossmedia Link answers questions like these with unmatched precision. This makes it an invaluable tool at a time when consumers switch back and forth between media like a channel-hopping TV viewer.

However, GfK Crossmedia Link's ultimate advantage is in linking users' consumption data to obtain an insight that no other market researcher in the world, other than GfK, is able to offer. "By comparing consumers' media usage with buying decisions made by the same people, we can determine exactly which media offers actually influence consumption – and which don't," explains Lee Risk, Commercial Director Media Asia and the Pacific at GfK. "This makes our Crossmedia Link panel the ideal platform for planning, evaluating and optimizing media campaigns."

GfK CROSSMEDIA LINK

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MARKET LEADER IN THE FOURTH MOST POPULOUS COUNTRY IN THE WORLD

GfK Crossmedia Link analyses are now already available in ten markets across the world. Of these markets, Indonesia is not only the first Asia-Pacific market but also an extremely interesting one. On the one hand, this is simply due to the size of the island state. With around 255 million inhabitants, the Republic of Indonesia is the fourth most populous country in the world. On the other hand, a fast-growing economy ensures that the country's middle class is increasing by a further five million people each year – and experience shows that these people get most of their information from mobile media.

“Indonesia is a mobile-first market where online access is almost exclusively via smartphone,” explains Stefan Heremans, Product Head GfK Crossmedia Link. With 308 million mobile devices there are already more mobile devices than inhabitants in Indonesia. Another particular feature of the country is that mobile devices are used more intensively in Indonesia than elsewhere. For example, in contrast to Europeans, Indonesians send very few personal messages by email, generally using social networks instead.

LEARNING FROM INDONESIA MEANS GAINING A DEEPER UNDERSTANDING

The thousand-island state with its wide range of languages, cultures and lifestyles shows how digital interaction occurs in mobile societies. Indonesia itself is a fast-growing market where local and international providers require well-founded media analyses. GfK has precisely this data in its hands and has had a Consumer Experiences team in Indonesia for some years. And the company is already considered the local market leader for point-of-sale analyses. Now, GfK Crossmedia Link, launched in 2014, builds on this position as a particularly powerful addition to GfK's range of analysis instruments.

“With our software-based analysis tools, we can record digital behaviors that conventional surveys would barely be able to register,” says Niko Waesche, Global Industry Lead Media and Entertainment at GfK. Provided the users agree, the GfK-owned software, LEOtrace, records every detail of specific digital user behavior from entered search terms to the time spent on individual apps. This data produces interesting findings.



There are
308
million mobile devices
in Indonesia today. That's
more devices than
inhabitants.





GfK UNDERSTANDS THE MARKET – AND HELPS TO SHAPE IT AT THE SAME TIME

GfK Crossmedia Link's findings relating to user preferences in specific sectors are similarly revealing. For example, GfK's specialists took part in a joint project with Google to examine how travelers find information online and where they book their trips. This also demonstrated the immense importance of mobile media. At 71 percent, the number of Indonesians making reservations on smartphones was almost three times higher than the number of consumers who booked their travel arrangements on a desktop.

However, GfK not only traces digital preferences but also goes some way in shaping them. An example of this is a prestigious start-up conference recently held in Jakarta by the Chinese market leader in search engines, Baidu. As keynote speakers, GfK experts shared some of their findings with the start-up companies attending the conference. The market researchers' expertise provides app developers with vital insights to help them design new applications to be more user-oriented and effective. In this way, GfK not only improves knowledge about media usage but also helps to optimize it – not just in Indonesia but around the globe. //