

Think with **Google**

Recharge, reconnect and celebrate:

Consumer insights for successful
Ramadan 2024 campaigns

PLAYBOOK

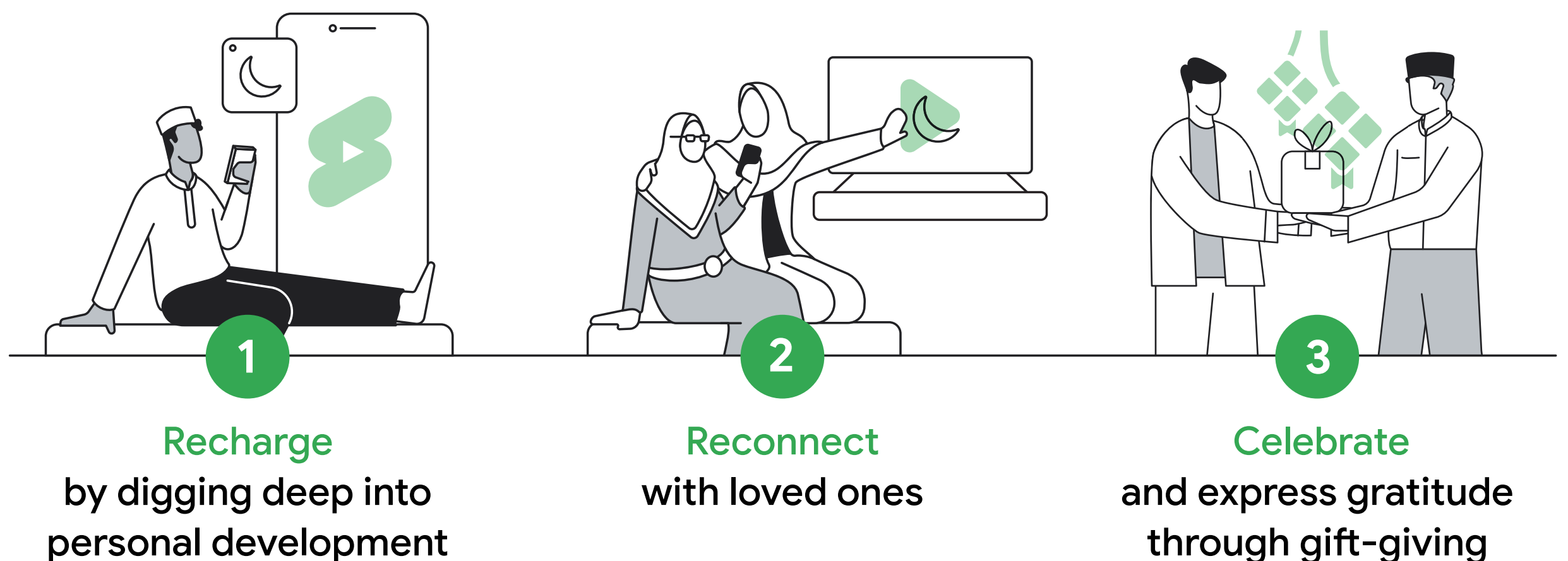
Overview

Year after year, Indonesian consumers eagerly anticipate the arrival of Ramadan with familiar excitement.

Be it the chance to delve into personal interests, prioritize daily dinners with loved ones, or purchase a new set of Eid attire, Indonesian consumers carve out the time to pause and relish in the atmosphere of togetherness and gratitude Ramadan brings each year.

In the chance to reflect and honor Ramadan traditions, there lies the opportunity to find new ways to celebrate festivities in the holy month.

In 2023, we saw the shift among Indonesian consumers and the way they experience Ramadan in 3 different ways:



For brands, this means new opportunities to engage people, meet their needs at any time and grow revenue effectively, efficiently.

In this playbook, we share insights on Indonesians' shifting media consumption and purchasing behaviors that will enable brands to meaningfully engage customers through effective, efficient marketing campaigns and drive revenues during **Ramadan 2024**.

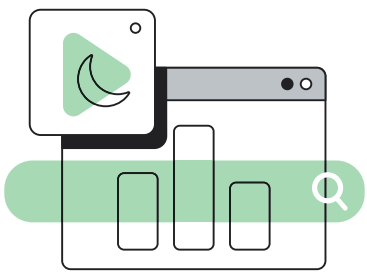


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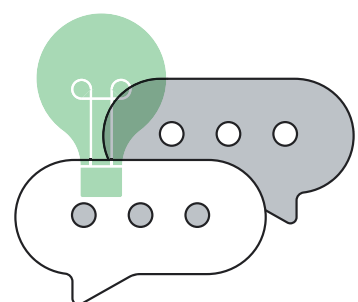
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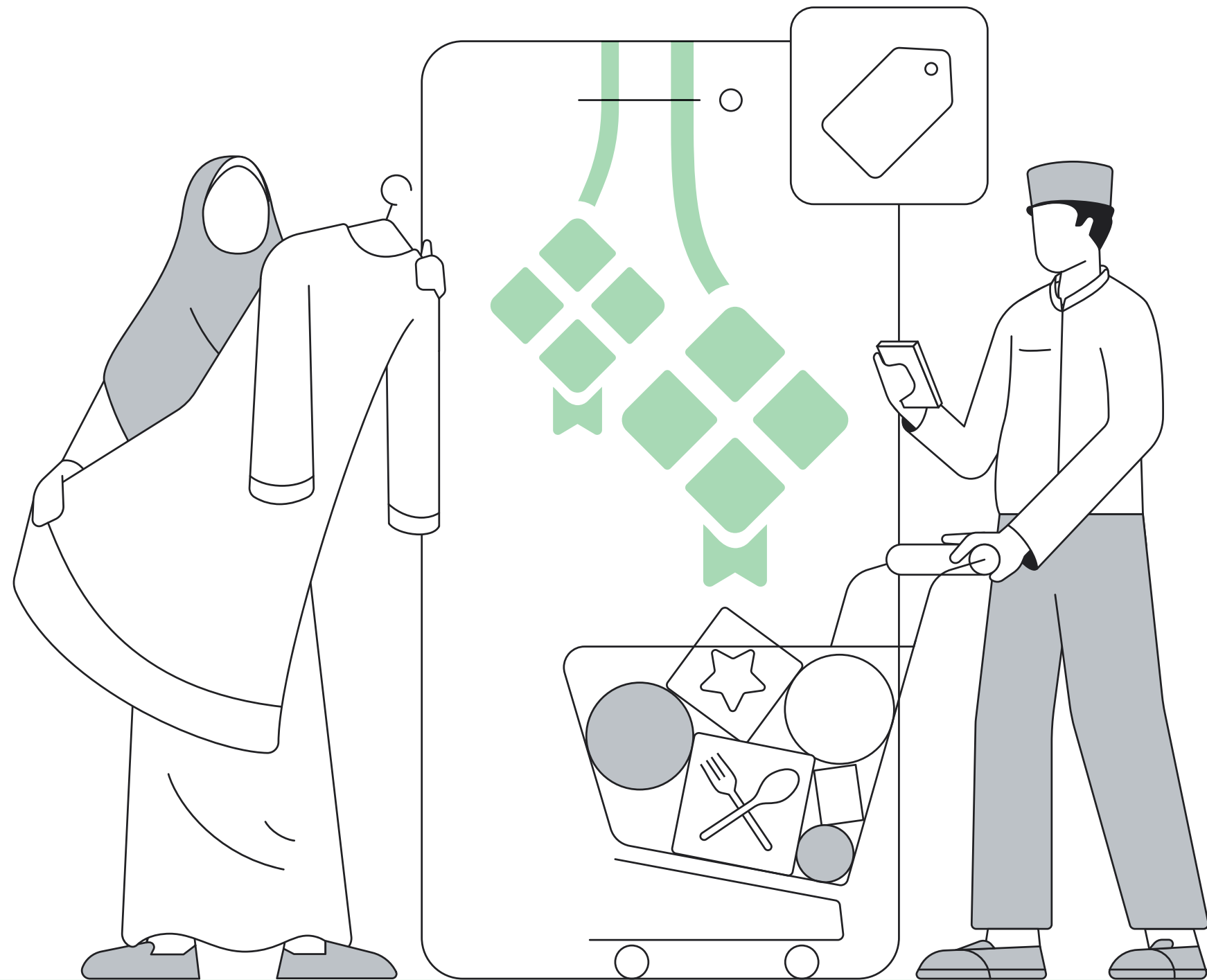
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01

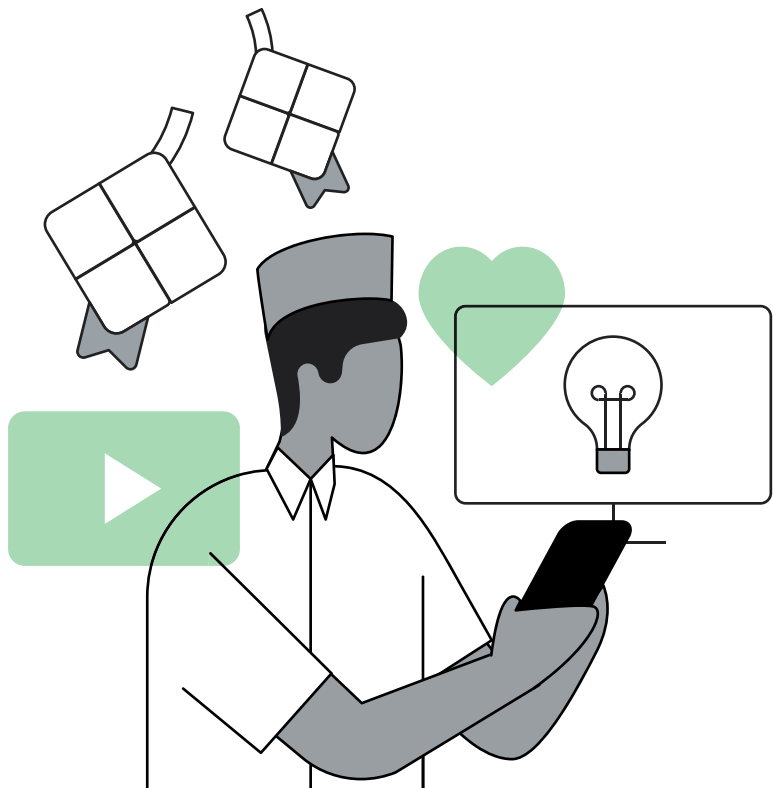


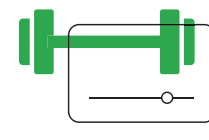
Honoring Ramadan 2023: Consumer behavior shifts in Indonesia

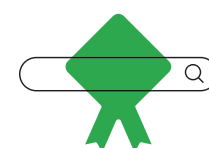
Recharge

To recharge during their Ramadan “me-time”, Indonesian consumers are seeking out video content that...

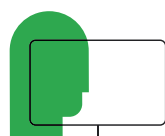
 ...aligns with their unique interests and personal development goals...




 **+60%**
increase in watchtime on YouTube for **weight training-related videos** in Q2 2023¹

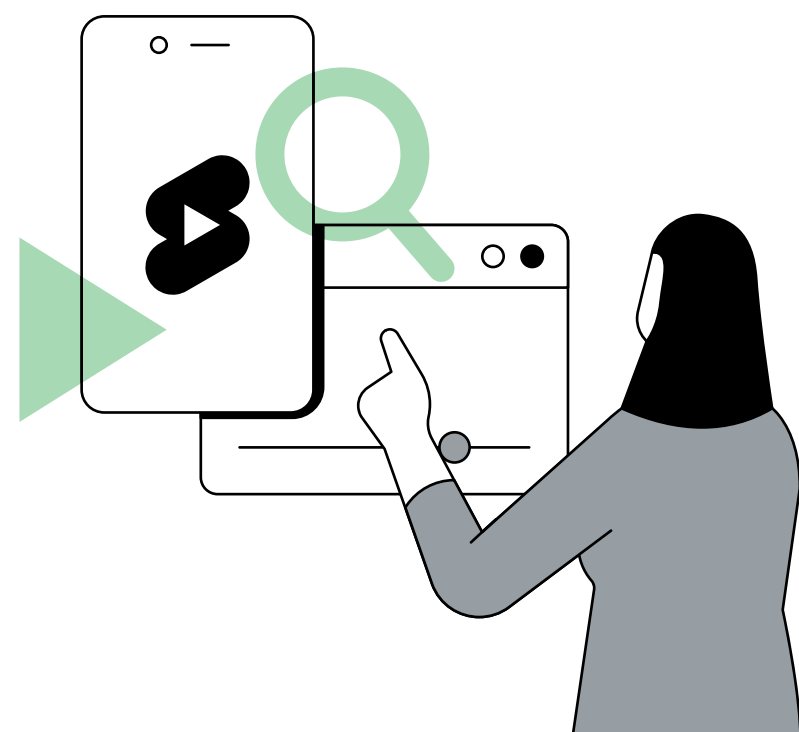
 **2.3x**
search growth for **Islamic/Muslim lifestyle-related** terms on YouTube in Ramadan 2023²

 **90%**
of Indonesia’s Gen Z are active users of **YouTube Shorts**³

 **>25M**
Indonesians stream YouTube on their **Connected TVs**⁴

 **95%**
of surveyed Indonesians watched content from a particular creator or artist **across different formats** (e.g. short form, long form, podcasts, live streams) over the past 12 months⁵

 ...and are switching seamlessly across screens and formats to immerse in this content.



Brand implication & case study

Sources:

¹YouTube Internal Data, ID, Q2 2023 vs. Q2 2022

²Google Trends, April 2022 vs. April 2023.

³Google/Kantar, WhyVideo, n=607 weekly video viewers 18-24 (ID), fielded from (5/26/23-6/6/23). Competitive set includes 8 market competitors:


Linear TV, Netflix, Disney+, Vidio.com, Facebook, Instagram, TikTok, Snack Video

⁴YouTube Internal Data, December 2022

⁵Google/Ipsos, YouTube Trends Survey, ID, May 2023, n=1838, online adults, age 18-44.

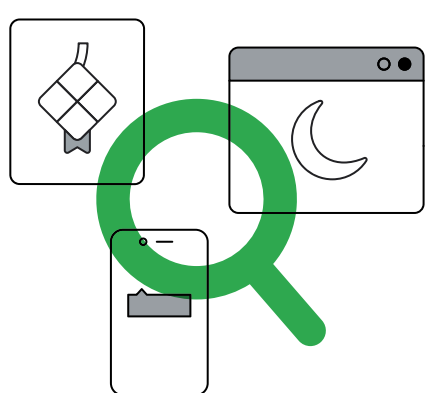
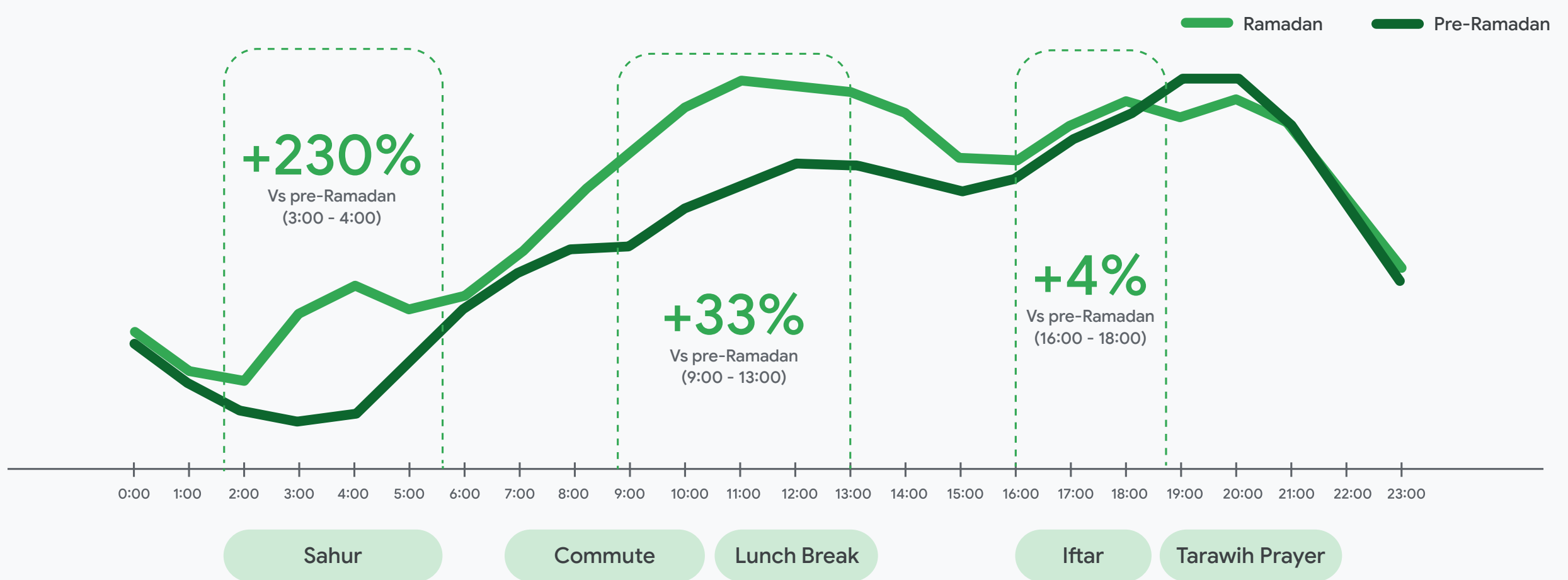
Reconnect

As Indonesian consumers spend quality “we-time” to reconnect with loved ones during Ramadan, they are...

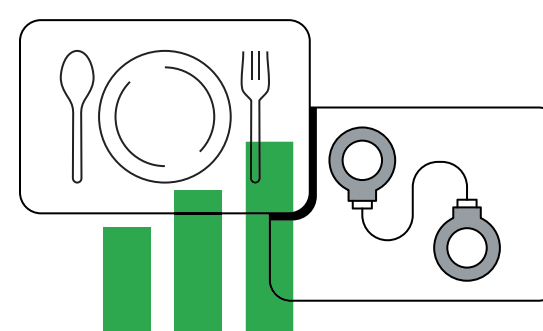
 ...actively integrating online viewing habits and experiences into offline communal activities.

Spikes in YouTube viewing have been observed to coincide with peak offline Ramadan festivities, such as Sahur period at dawn (02:00-04:00 AM) and Iftar or break fasting time (04:00-06:30 PM).¹

Average YouTube watchtime over a 24H period, ID users



YouTube Search for “Halal Bihalal”, “Open House”, “Sahur on the Road” and “Buka Puasa” surged by up to 250% YOY from 2022²



Watchtime for food-related videos on YouTube grew by over 80% while watchtime for crime film videos on YouTube in Q2 2023 increased over 50% compared to 2022³

Brand implication & case study

Sources:

¹YouTube Internal Data, ID, Q2 2023 vs. Q2 2022

²Google Trends, April 2022 vs. April 2023.

³Google/Kantar, WhyVideo, n=607 weekly video viewers 18-24 (ID), fielded from (5/26/23-6/6/23). Competitive set includes 8 market competitors: Linear TV, Netflix, Disney+, Vidio.com, Facebook, Instagram, TikTok, Snack Video

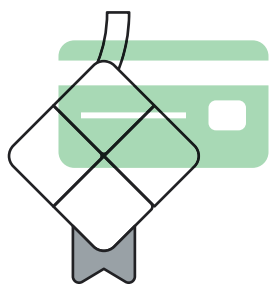
Celebrate



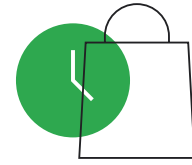
Indonesian consumers take Ramadan celebration and shopping to the next level, with extensive planning and decision-making involving online and offline touchpoints.



Nearly **2x** of Indonesian consumers participate in shopping during **Ramadan (58%) vs. Double Day sales (33%)¹**

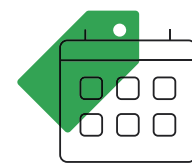


Shoppers in **Ramadan / Hari Raya** make up to **1.4x times more purchases** than in Double Day sales¹



93%

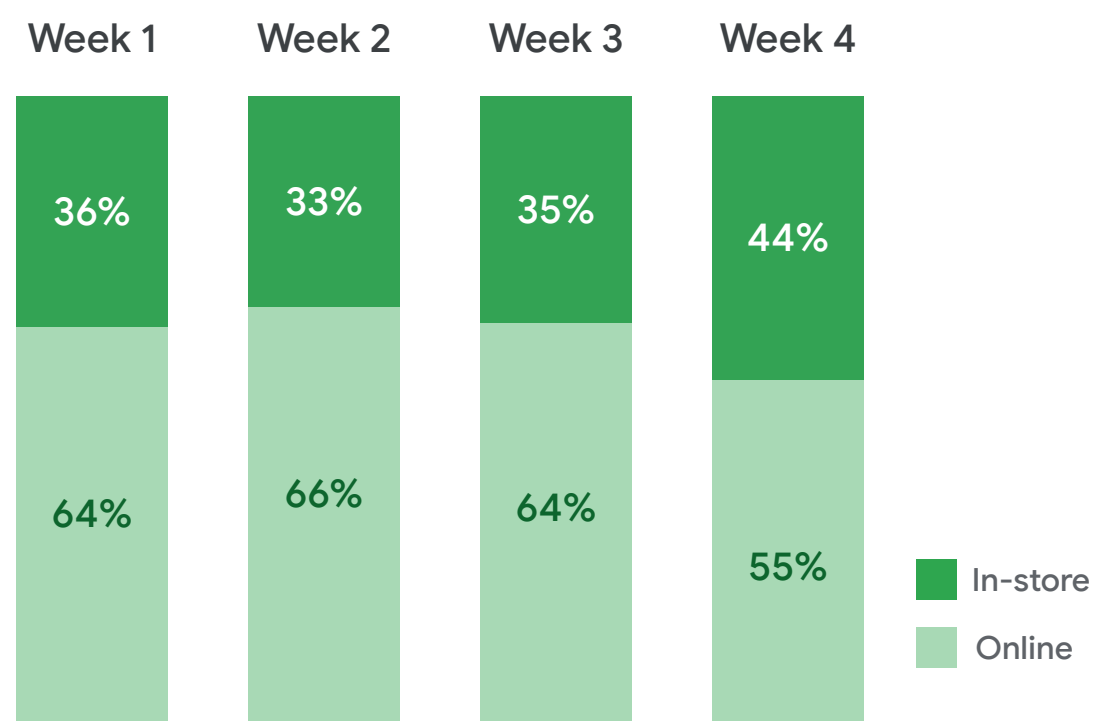
of purchases during Ramadan are **planned¹**



~50%

of Ramadan purchases arise in ideation during the **first week of the month¹**

Weekly transaction channel during Ramadan



In the last week of Ramadan (during Mudik), many searches are impulsive, with consumers frequently looking for the 'nearest' options for various goods and services.²


Top searches throughout the period



Sources:

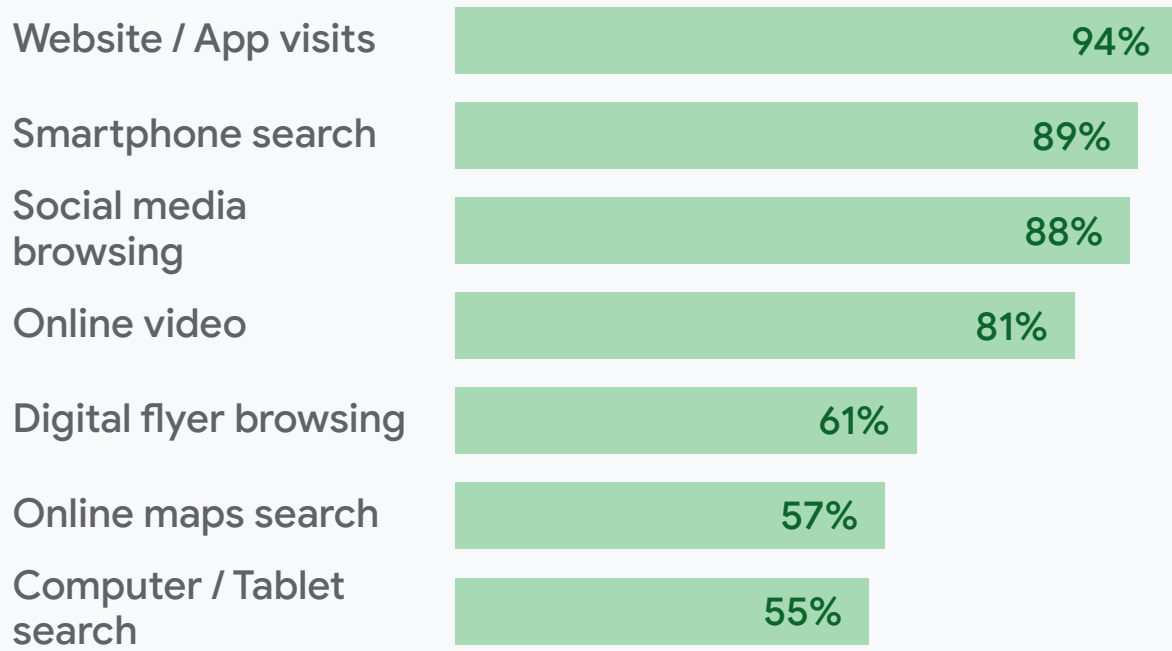
¹Google/Ipsos, Shopper Moments Study: Ramadan, Indonesia, 2023, among n=1303 21+ consumers who conducted shopping activities for Ramadan in the past 2 days, April 3-27.

²Google Trends, April 2022 vs. April 2023.

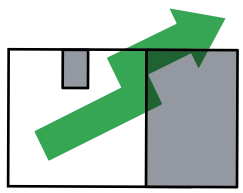
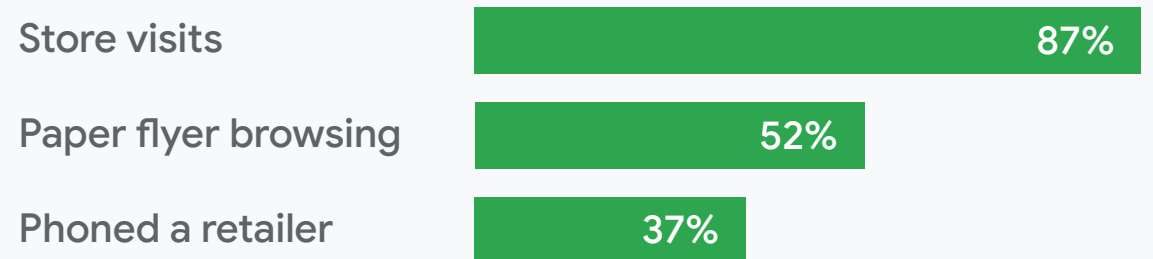
 Digital touchpoints stand out as a major deciding factor for Indonesian consumers before making a purchase...

7 out of 10 touchpoints used by Indonesian shoppers during Ramadan are digital, with Google and YouTube standing out as the top 2 digital touchpoints used in the process of researching products¹

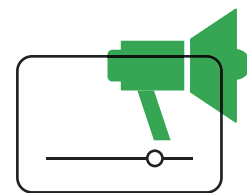
Digital Touchpoints



Offline Touchpoints



Heavy touchpoint users (those using 8+ touchpoints) are shown to make 1.7x more purchases than the average consumer¹



80% of YouTube viewers in Indonesia agree that advertising in videos on YouTube helps them decide what to purchase²



88%

of Ramadan shoppers shopped with at least one retailer they've never purchased from before¹



89%

of YouTube viewers in Indonesia agree that advertising in videos on YouTube introduces them to new brands or products²



...including the push to try products or services from new brands.



Brand implication & case study

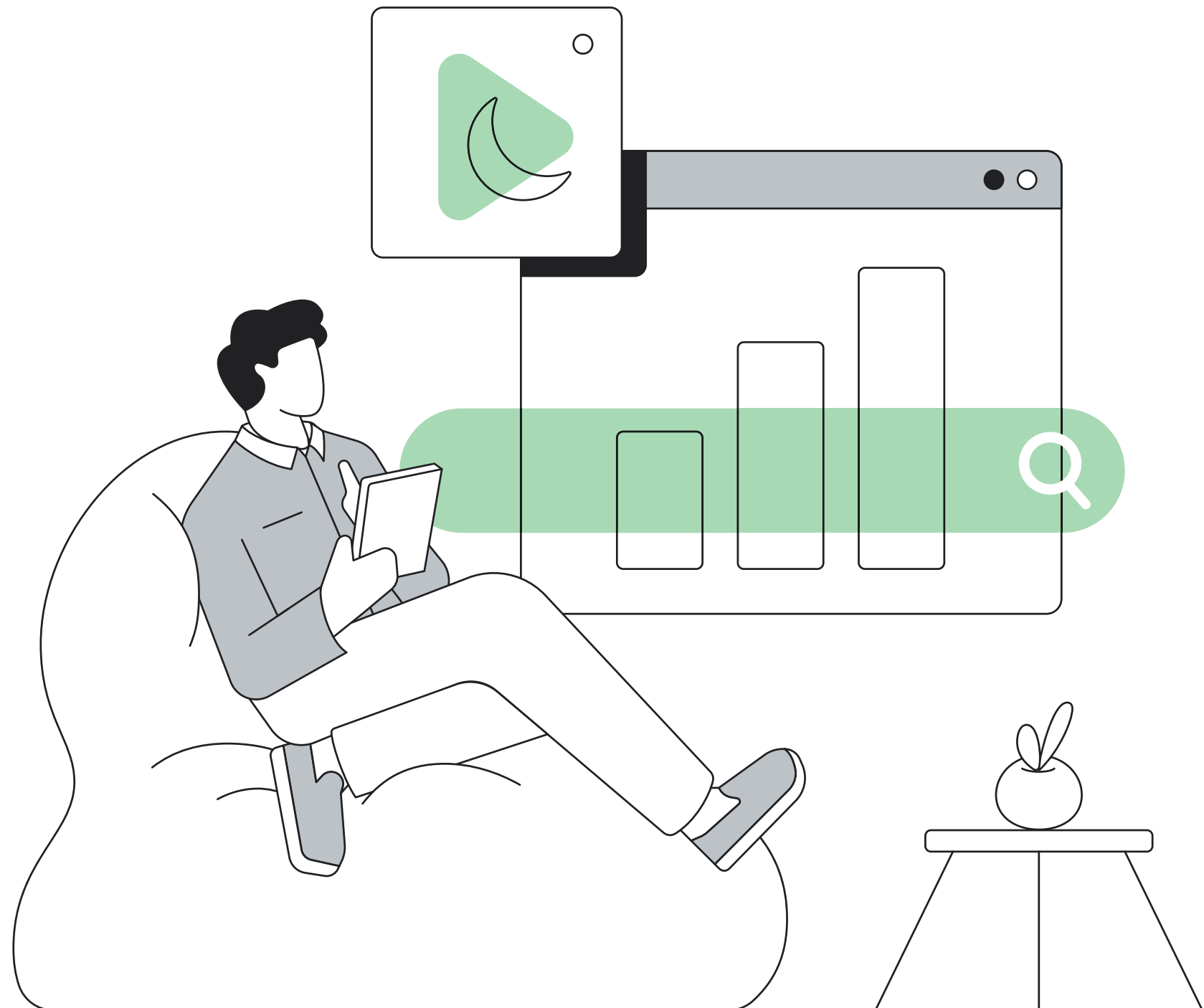
Sources:

¹Google/Ipsos, Shopper Moments Study: Ramadan, Indonesia, 2023, among n=1303 21+ consumers who conducted shopping activities for Ramadan in the past 2 days, April 3-27.

²Google/Kantar, WhyVideo, n=2204 weekly video viewers 18-64 (ID),

fielded from (5/26/23-6/6/23). Competitive set includes 8 market competitors: Linear TV, Netflix, Disney+, Vidio.com, Facebook, Instagram, TikTok, Snack Video

02



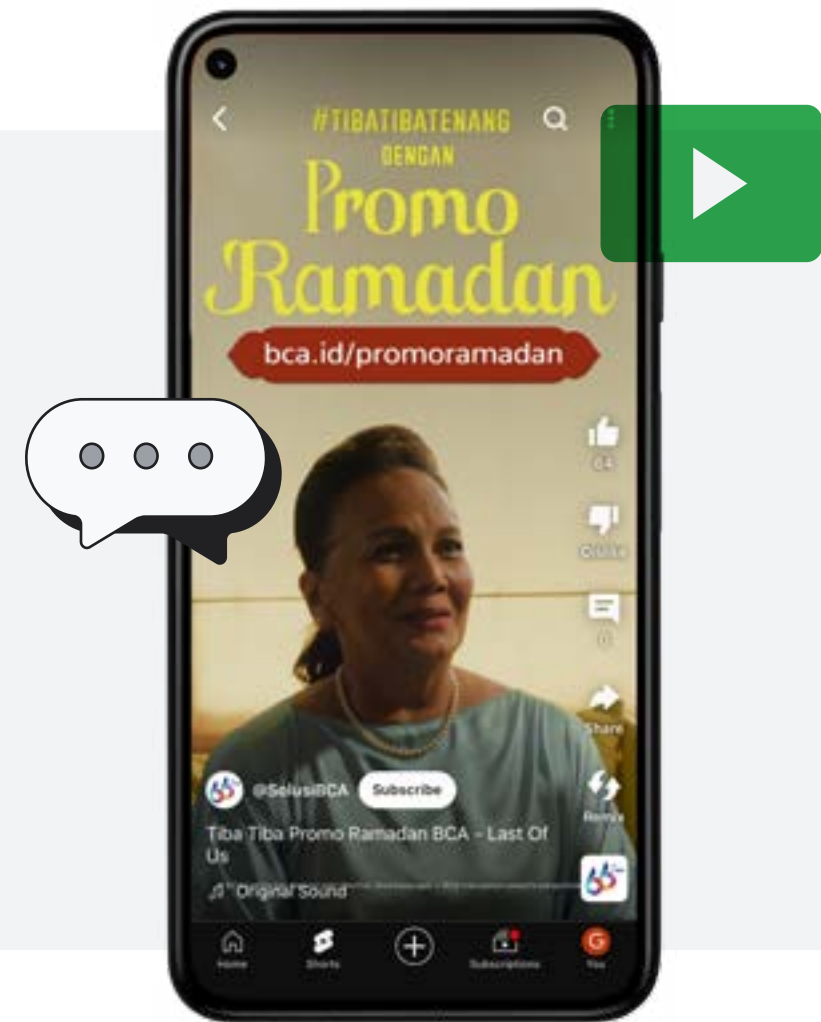
Learn from the best: Ramadan best practices with Google & YouTube ad solutions

Brand implication #1

Leverage the unique benefits of multiformat content to bring your creative storytelling to life and win consumer attention effectively.

Success Story BCA #TibaTibaTenang

To maintain BCA mobile's top-of-mind status as the go-to app for financial needs, BCA believed it was essential to launch a Ramadan campaign with a strong story about Ramadan's unexpected occurrences that resonated with users' needs and concerns.



Approach

Using 1P data and Google's audience solutions, BCA brought its creative storytelling to life across multiple formats.

BCA used 4-6min videos to tell the full story of Christine Hakim's journey during Ramadan and Eid, while 15-second versions focused on specific challenges and solutions. They leveraged YouTube's unique ability to combine long and short formats (horizontal + vertical) for [sequential storytelling](#).

Using AI-powered [Video reach campaigns](#), BCA ensured that its range of assets were optimized and the right ad was served efficiently to the right audience at the right time.

To connect to Indonesians in moments that matter most, BCA added [YouTube Mastheads](#) during key moments like Ngabuburit to take over the YouTube Homepage and reach Indonesians at scale.



115M

Impressions (Tiba-Tiba Ramadan) and 112M Impressions (Tiba-Tiba Lebaran)

61M+

video views, an average VTR of 62% for its long-duration formats (6 mins and 4 mins)

100%

SOV a full hour during 'ngabuburit' for Masthead

130%

achieved reach over internal KPI via VRC

+2%

purchase intention lift

42.18%

Traffic accounted for from the overall website of BCA

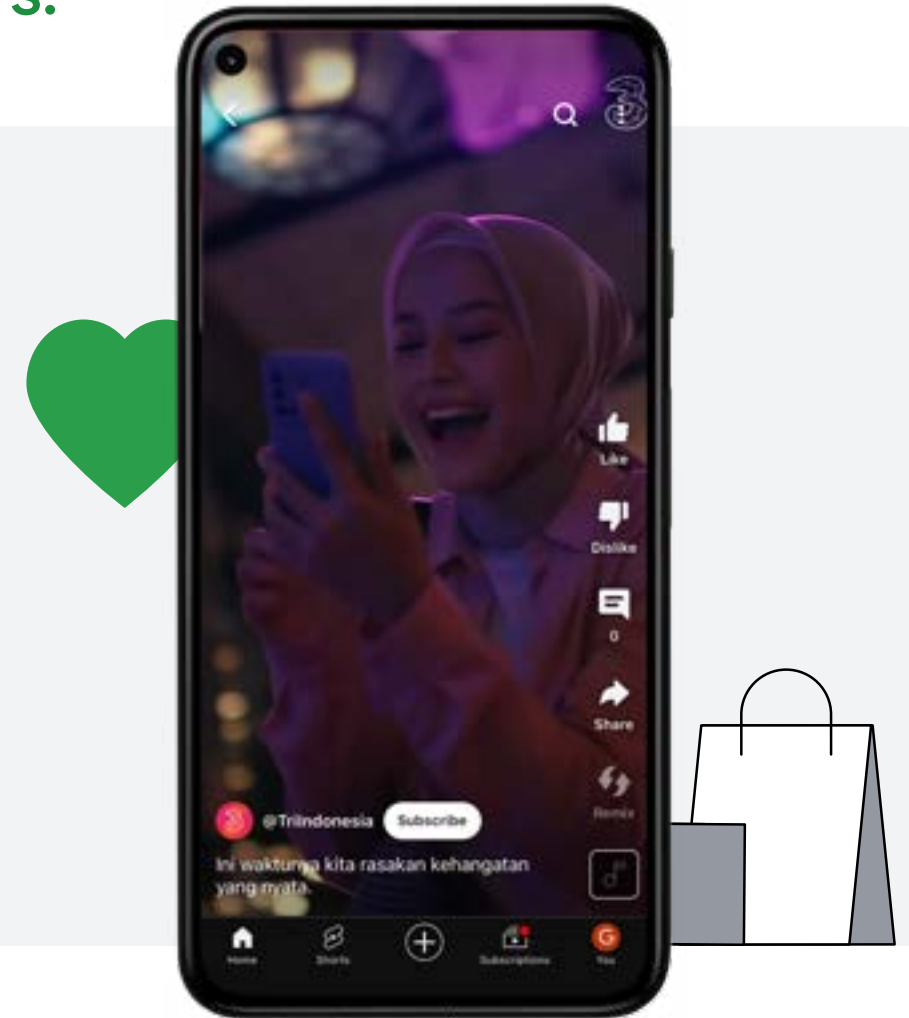
Brand implication #2

Build assets dynamically based on relevant audience signals such as daypart, location, and interests to effectively reach and ultimately drive action from the right consumers.

Success Story

Tri #IniWaktunyaKita

Tri, Indonesia’s leading telco provider, was seeking to grow brand love and drive purchases from Gen Zs to their latest Ramadan offering, Happy Package that includes data bundles with entertainment streaming platforms, social media, and gaming apps.



Approach

Using [Google DV360’s data-driven creatives](#), along with Google insights into the audience group’s interests and watchtime profile, Tri’s campaign dynamically served multiple ad assets across tailored combinations of times and locations, using relevant interest topics such as K-dramas, music and gaming.

Tri’s strategy enabled them to serve 160 ad assets across 10 cities - greeting audiences during sahur, accompanying streaming audiences during Ngabuburit, and being present for moments on social media.

Finally, leading up to Eid in the homecoming period, Tri took the chance to extend their personalized marketing to offline channels by programmatically booking digital billboards, identified top Gen Z hang-out places & became present where their audience spent iftar via Google DV360 programmatic [DOOH](#).



3.5x

Revenue growth vs. Ramadan 2022, with a consistent 8% growth rate

~90M

views on YouTube, with an impressive 39% VTR outperforming industry benchmarks

74%

Reach of 55 million audience achieved, with an additional 25% of unique audience through cross-channel duplication & a weekly frequency of 2x (10.1x average frequency)

16%

Awareness lift gained within 2 months of airing

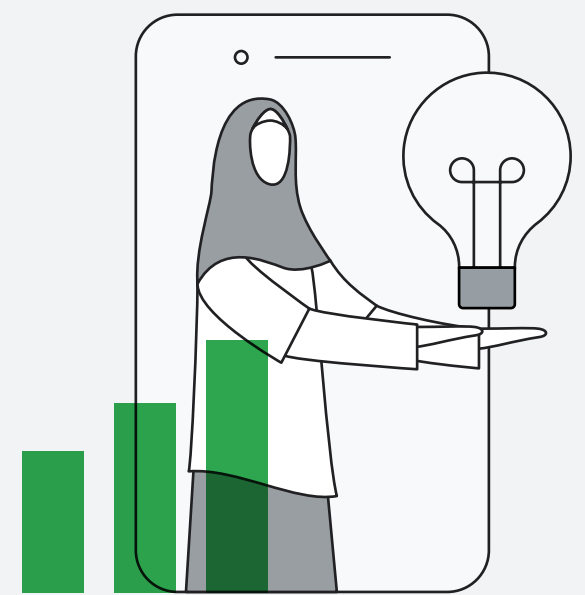
Brand implication #3

Amplify brand presence across online touchpoints during key timings of Ramadan, to supercharge consideration and capture audiences at scale, both online and in-store.

Success Story

Frisian Flag Indonesia #PejuangKemenangan

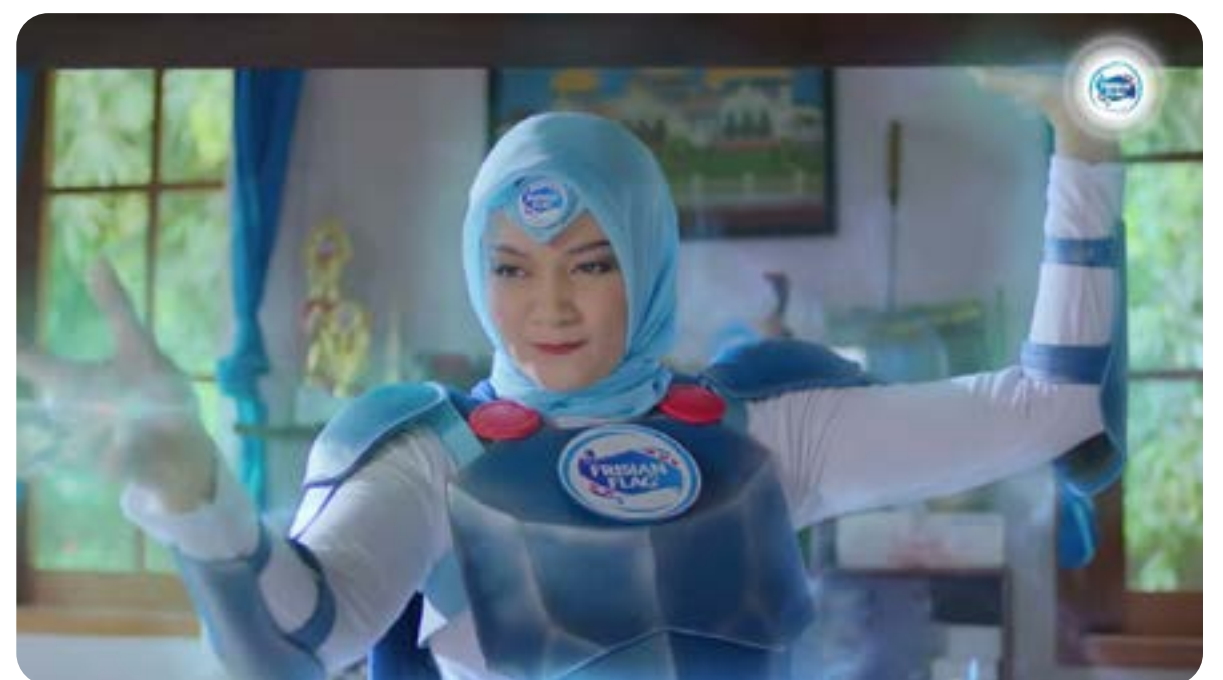
FFI wanted to set themselves apart and drive considerations to be top-of-mind in the sweetened condensed milk category for Ramadan 2023. They strategically harnessed the spirit of resilience, encapsulated in the phrase “Kekuatan untuk Menang” (Strength for Victory), as a driving force behind their campaign. They then shifted their focus to drive up their creative storytelling and hit the nail with their target audience of Indonesian mothers, or who they call, Ramadan’s superheroes (Pejuang Kemenangan).



Approach

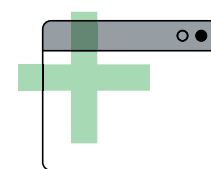
Incorporating the essence of “Kekuatan untuk Menang”, FFI told the story of everyday concerns shared by mothers in Ramadan: thinking of new ways to provide and prepare Ramadan meals every single day without fail, especially during the early hours of the morning for Sahur. Depicting mothers as the superheroes of Ramadan, FFI highlighted their SCM products as these women’s superpower to add the right amount of sweetness to every Ramadan dish.

To bring their storytelling to life, FFI utilized YouTube’s [video ad-sequencing](#) and [time-targeting capabilities](#) to ensure that their target audience viewed their ads in their entirety. Viewers were shown the 60-second hero asset and then two 6-second ads as aligned with Sahur and Iftar timings to increase relevancy and ad recall. This strategy of video ad sequencing aimed to not only ensure that users experienced the complete story but also achieve higher recall and consideration lift.



0.9%

Lift achieved at their all-time highest (2x higher than CPG benchmark)



Positive sentiment and connections among target audience

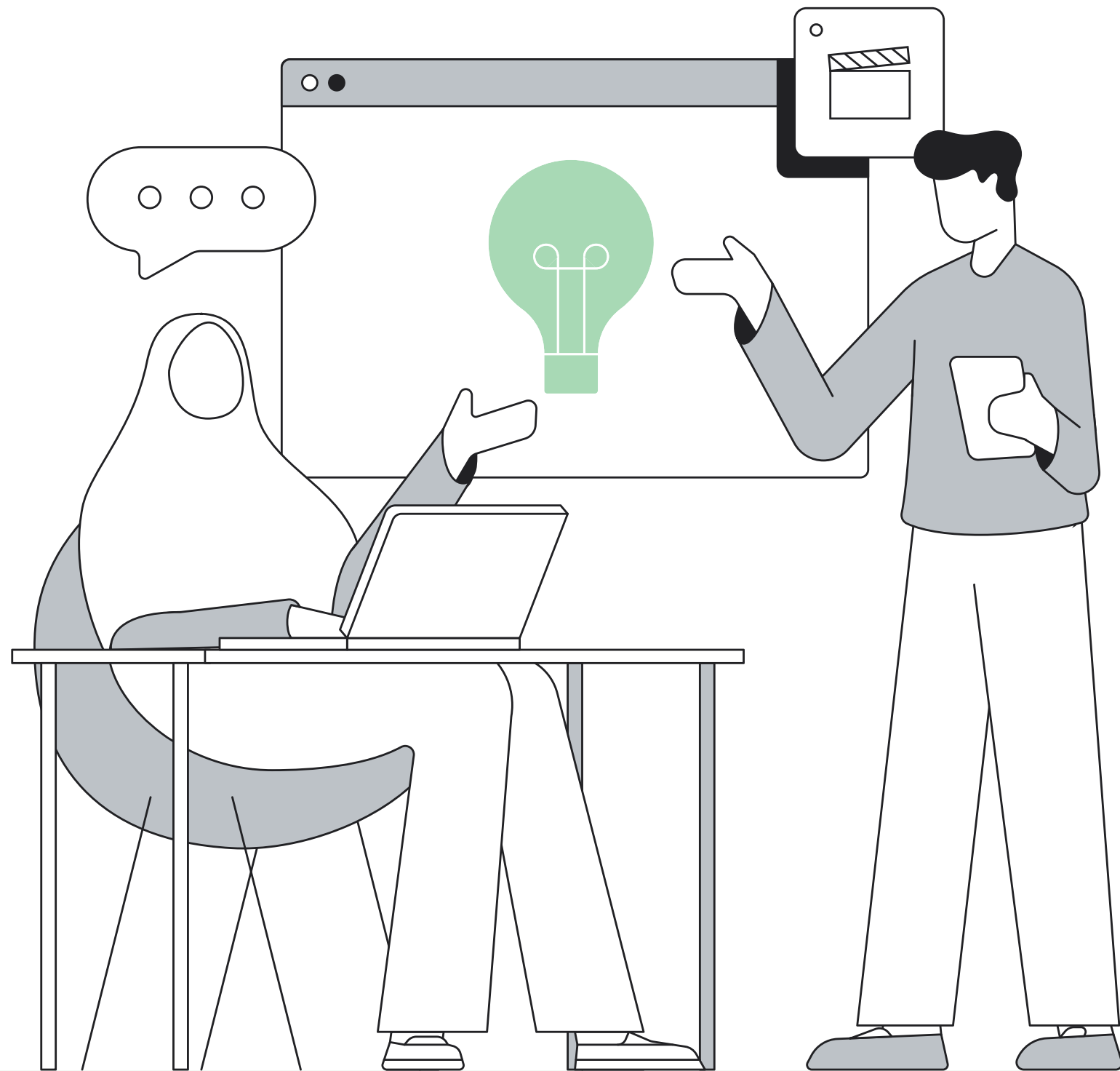
>32M

views within 30 days with 63% VTR (previous festive at 6%)



Highest market share in SCM category over the past 2 years

03



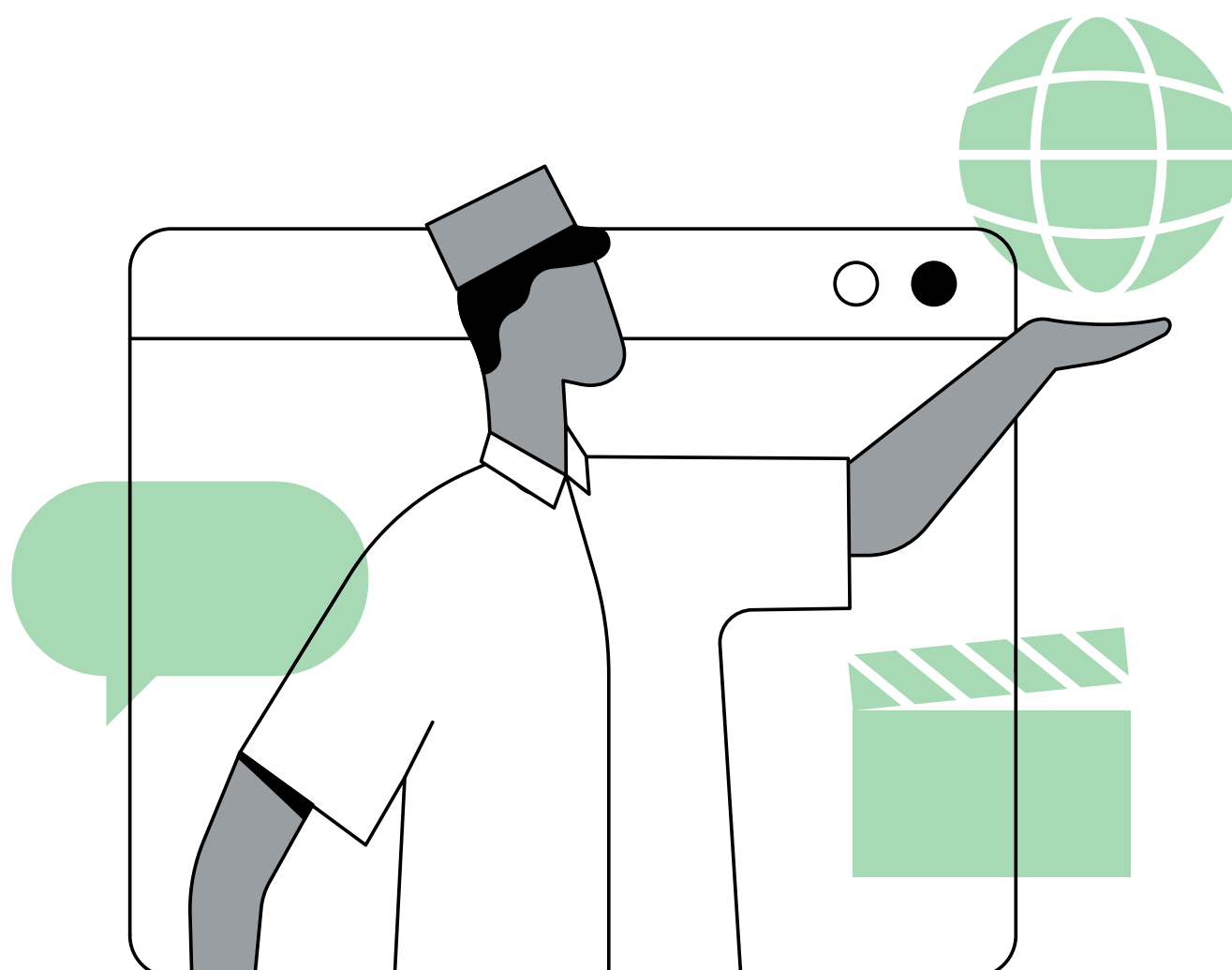
Winning Ramadan 2024: Creative & media recommendations



5Cs for Ramadan Creatives



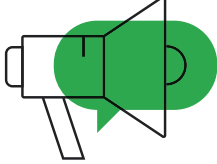
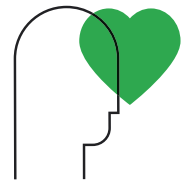

Creative strategies that led to enhanced performance

	Compassion	Connection	Connected Canvas	Collaboration	Contemporary
Strategy	<p>Create for Ramadan context: Togetherness, Kindness</p>	<p>Develop story to each Ramadan moments: Inspire during Ramadan, drive action during Eid</p>	<p>Think multi-format: Be available and get optimum reach through long and shorts</p>	<p>Leverage brand collaboration: Be relatable and authentic with creators</p>	<p>Leverage the new tech and AI solution</p>
Solution	<p>Trendjacking Custom Line-Up</p>	<p>Signal based ad Custom Line-Up</p>	<p>Google Blast 4.0 CTV YouTube Shorts</p>	<p>Creator Promotion Creator Connect</p>	<p>AI Powered Full Funnel + Shorts</p>





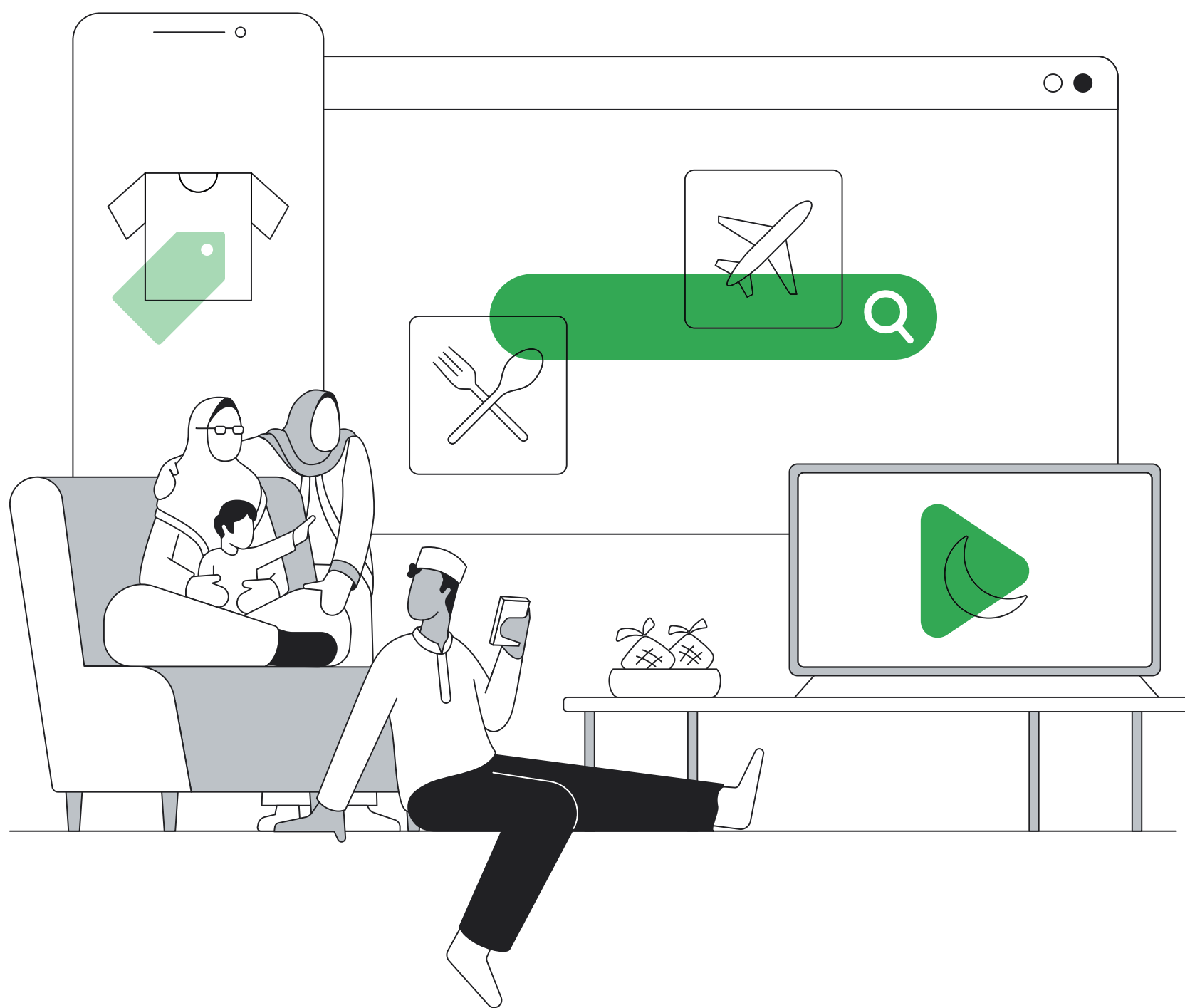
Ramadan Media Orchestration Framework

Marketing Objective	Core KPI & Measurement	Core	Amplify	 Includes Shorts  Available on DV360
 Awareness	CPM Reach & Frequency Ad Recall Lift Awareness Lift	VRC Video Reach Campaigns (VRC2.0 Incl. Shorts)	Masthead - CPH / CPM / Livestream Music Connect ^{NEW!} First Position Moments ^{NEW!} Roadblocks	BLAST Food Spotlight Hub ^{NEW!}
 Brand Consideration	CPV Consideration Lift Search Lift Favorability Lift	VVC Video View Campaigns	Lineups - Shorts / CTV ^{NEW!} CTV Pause Ads Manual CPM formats Search Keyword Packs	Topic Targeting
 Purchase Consideration	CPC / CPA Attribution	Power Pairing (PMax + Search)	Creator 2 Cart ^{NEW!} DemandGen In DV3 - H1/24 VAC / Discovery	



For more information on Google and YouTube's advertising solutions, contact your Google representative.

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