

Customer Satisfaction in Indonesia's E-Commerce Services (2016)



How satisfied Indonesian consumers toward e-commerce services?

- Started around 7 years ago in Indonesia, the two local pioneers are Tokopedia and Bukalapak.
- At that time, level of trust were low and frauds are often happened. Common example is the merchant never deliver even though the buyer had already wired the money (via bank transfer).
- The main reason e-commerce sector had not gained any trust was because it's a new business. They need to educate and build the ecosystem slowly. Challenge!



How satisfied Indonesian consumers toward e-commerce services?

- Market slowly accepted e-commerce service. Behavior shifted when Rocket Internet's Lazada came to Indonesia. Infrastructure changed the way they operate and ecosystem started to form.
- As the result, more and more e-commerce players emerge. Foreign start to see Indonesia as huge potential market. Frost & Sullivan forecast Indonesia's e-commerce market size can grow at a CAGR of **31.1%** to reach \$3.8 billion by 2019.
- But what about consumers? Are they satisfied with e-commerce services in Indonesia?



Survey Method



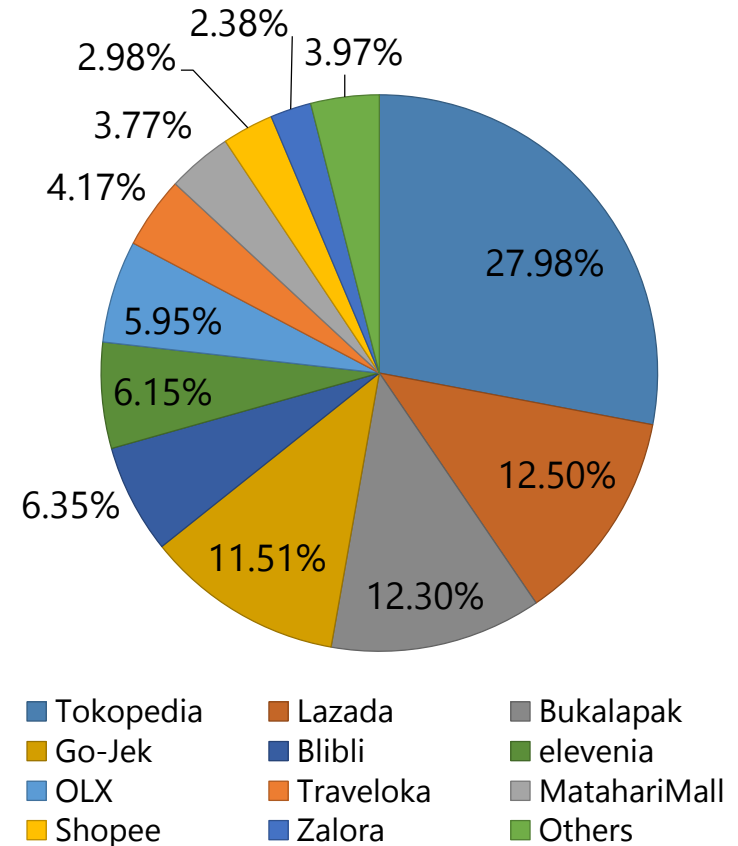
Survey Method

- To determine the level of customer satisfaction towards e-commerce services in Indonesia, we asked 504 respondents who shop online for the past 3 months on where they shop, how they pay, what kind of problem they experienced, and are they satisfied enough with the service.
- **52.78%** of the respondents are female, **47.22%** are male. Most of them are from Java, Indonesia.

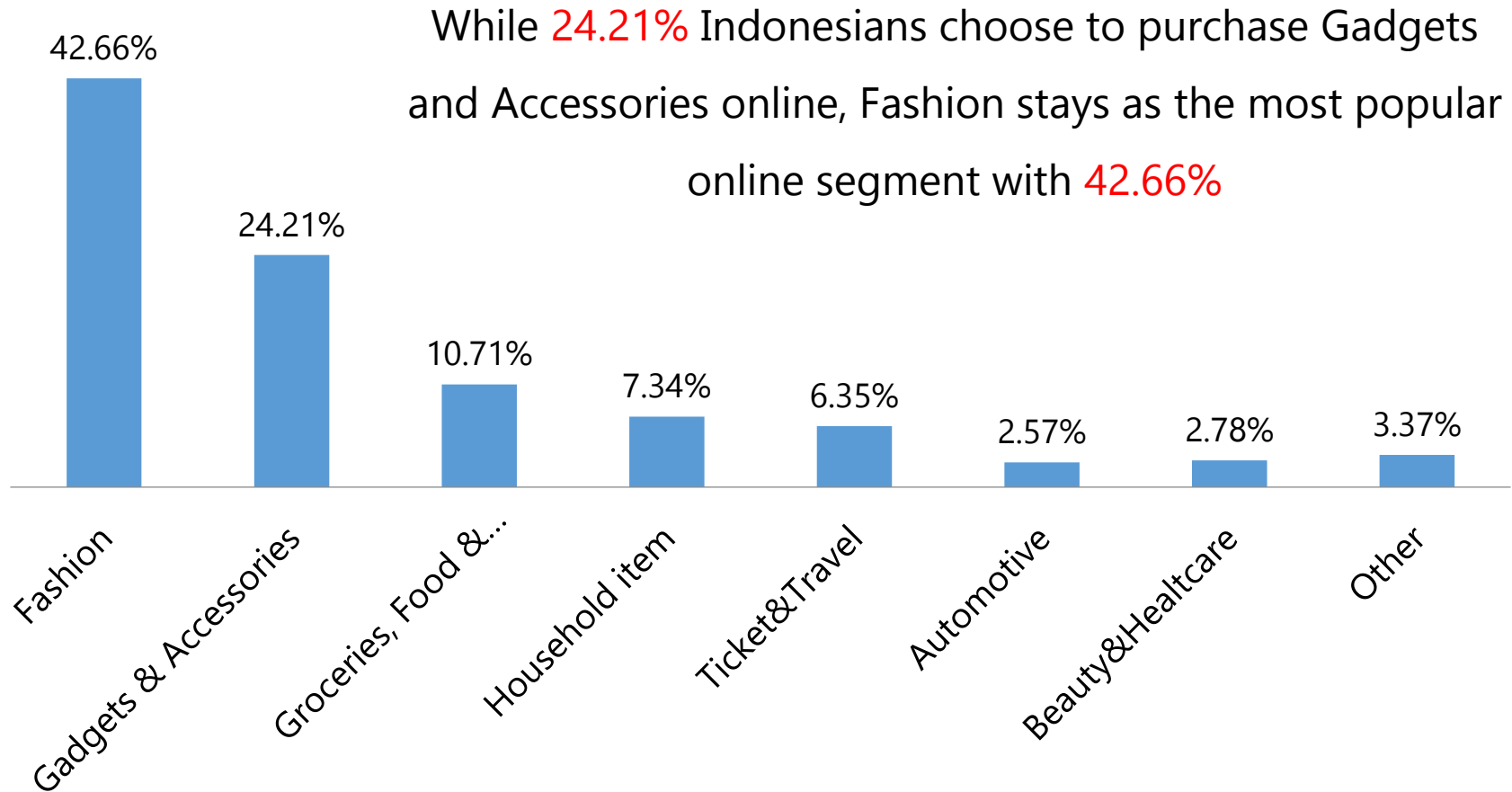


Popular E-Commerce Services in Indonesia

- Tokopedia is one of the e-commerce player who start early in Indonesia and as the result they stay on top as a popular platform with **27.98%**
- Lazada is one of player who changed the behavior of Indonesia toward e-commerce and now they stayed in second place with **12.50%**. Then followed by Bukalapak with **12.30%**
- Go-Jek, although their primary service is transportation on-demand, Gojek began to gain traction as an e-commerce service too (with Go-Mart) with **11.51%**.

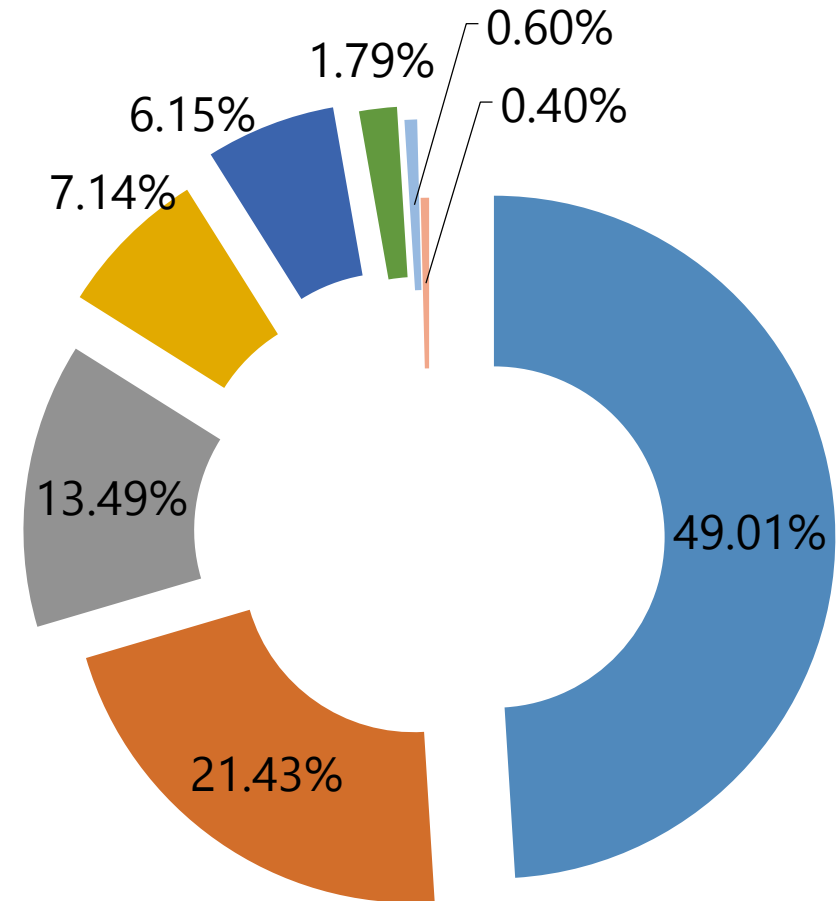


Popular Item Purchased Online



Payment Method

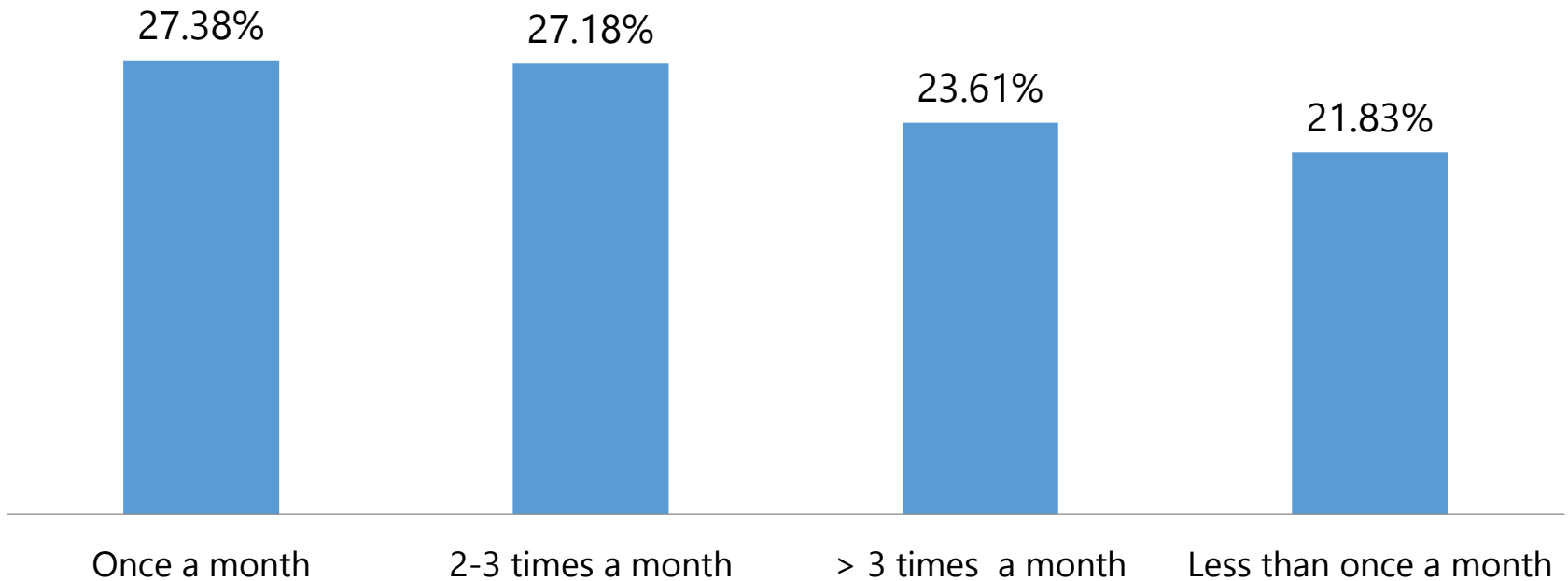
- Nothing really changed in payment method. Bank transfer and Internet banking account around 70%, followed by COD (13.5%)
- One interesting thing is paying from minimarket is gaining traction. Now accounts at 7.14%, higher than Credit Card.



- | | |
|--------------------|-----------------------|
| ■ Bank Transfer | ■ Internet Banking |
| ■ COD | ■ Pay from Minimarket |
| ■ Credit Card | ■ Escrow |
| ■ Electronic Money | ■ Mobile Banking |



Access Frequency



Access frequencies are divided evenly
but the majority of the respondents shop online once a month.



Reasons to Shop Online

Price and Discount is the top reason why Indonesians shop online. Followed by the **Ease of payment** and the **Detailed Product Information**.



Reason for Shopping Online

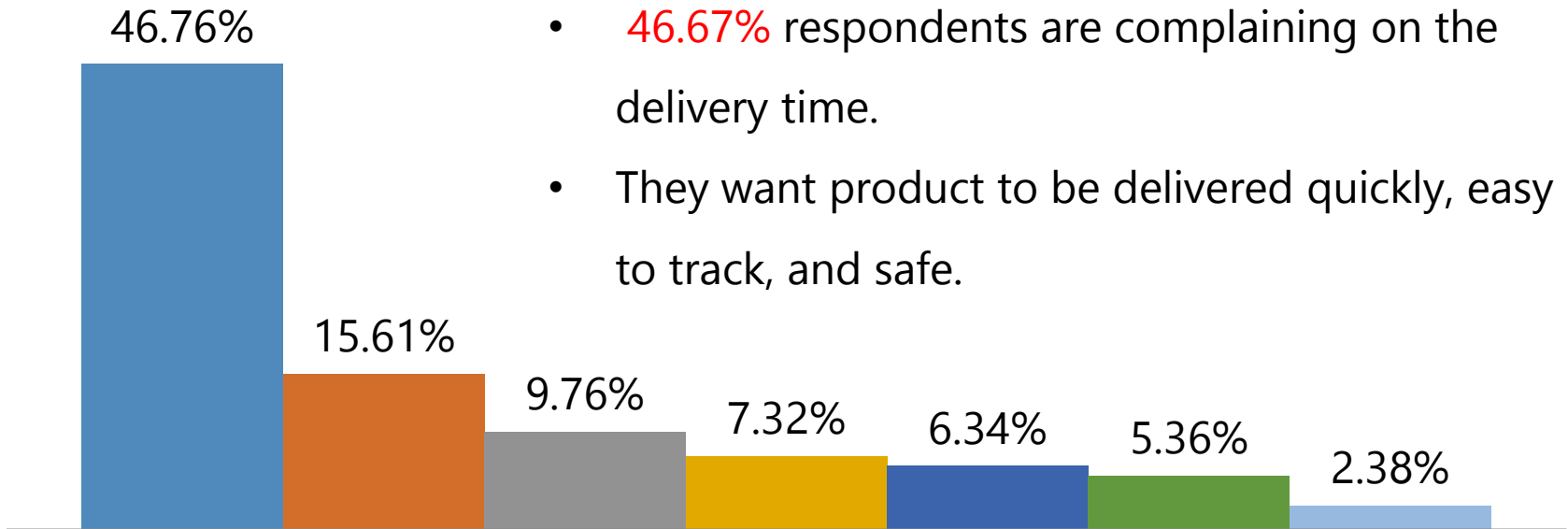
- Reasonable price and discount
- Ease of Payment
- Detailed Product Information
- Mobile Friendly
- Access Speed
- Responsive CS
- Free Delivery
- Complete and Varied Product
- Others



40.67% respondents are still
experience problem while
shopping online.



Problems in Online Shopping



- **46.67%** respondents are complaining on the delivery time.
- They want product to be delivered quickly, easy to track, and safe.

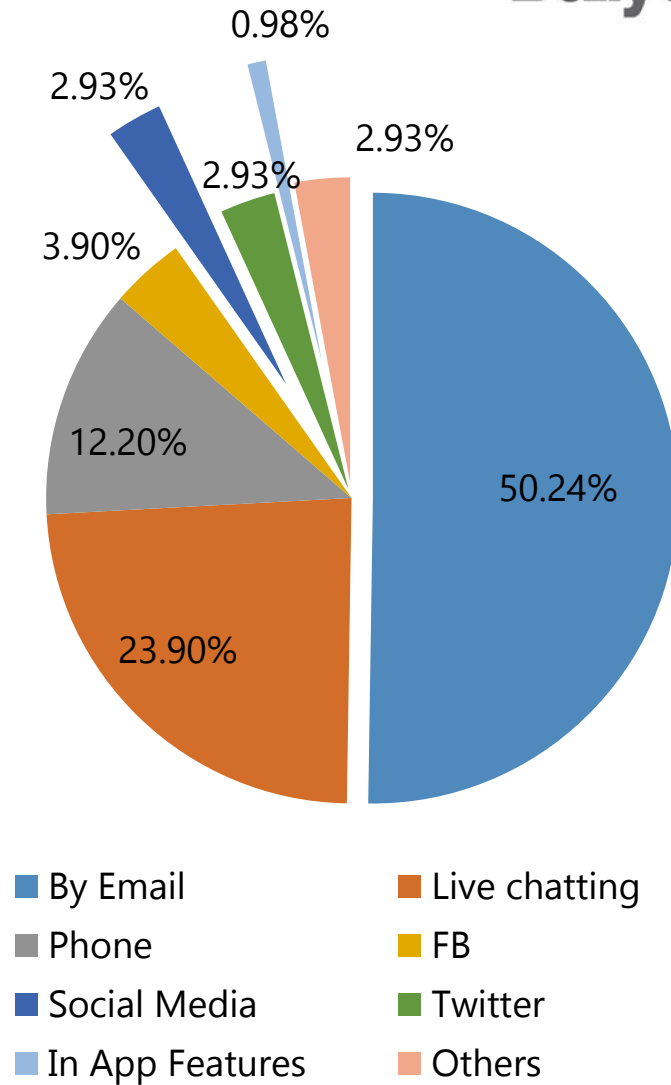
Problem

- Long Delivery Time
- Long Payment Confirmation Time
- Mistakenly Sent Product / Swapped
- Products are Difficult to Track
- Undelivered Product
- Products damaged / defective / does not match photos
- Others



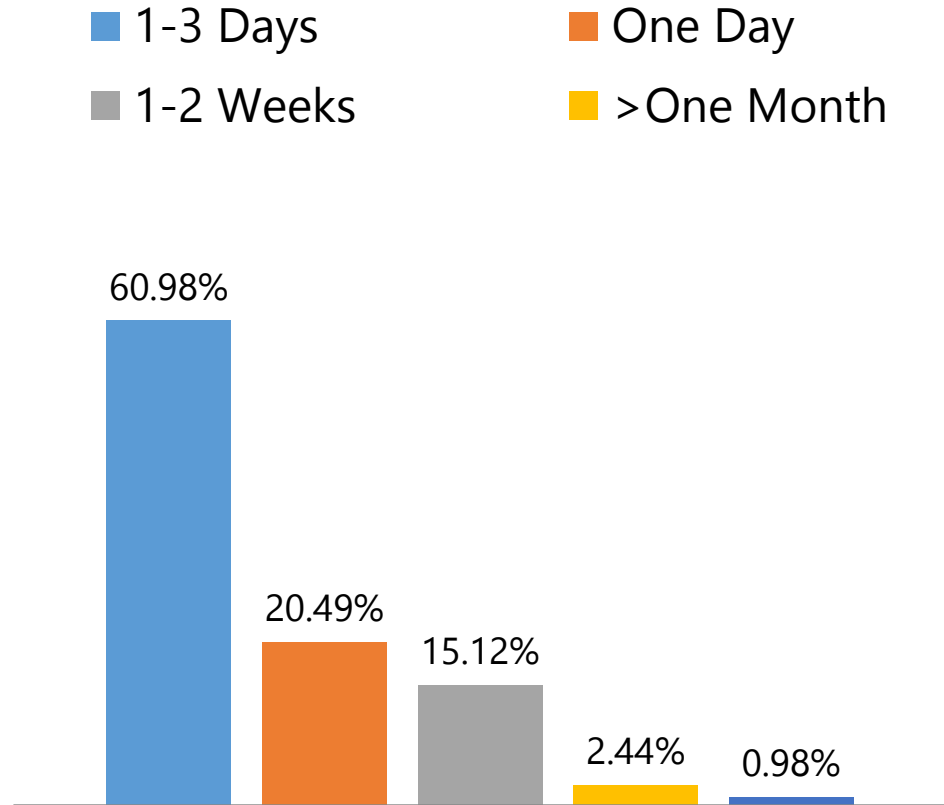
How Indonesians Filed a Complaint

- Email is the most favorite method for Indonesians to file their complaint.
- Followed by live chatting (23.90%) and phone call (12.20%)



Duration of Problem Resolved

- E-commerce services are quite responsive when it comes to resolving the consumer's complaints.
- **60.98%** consumer said their problem are resolved within 1-3 days.

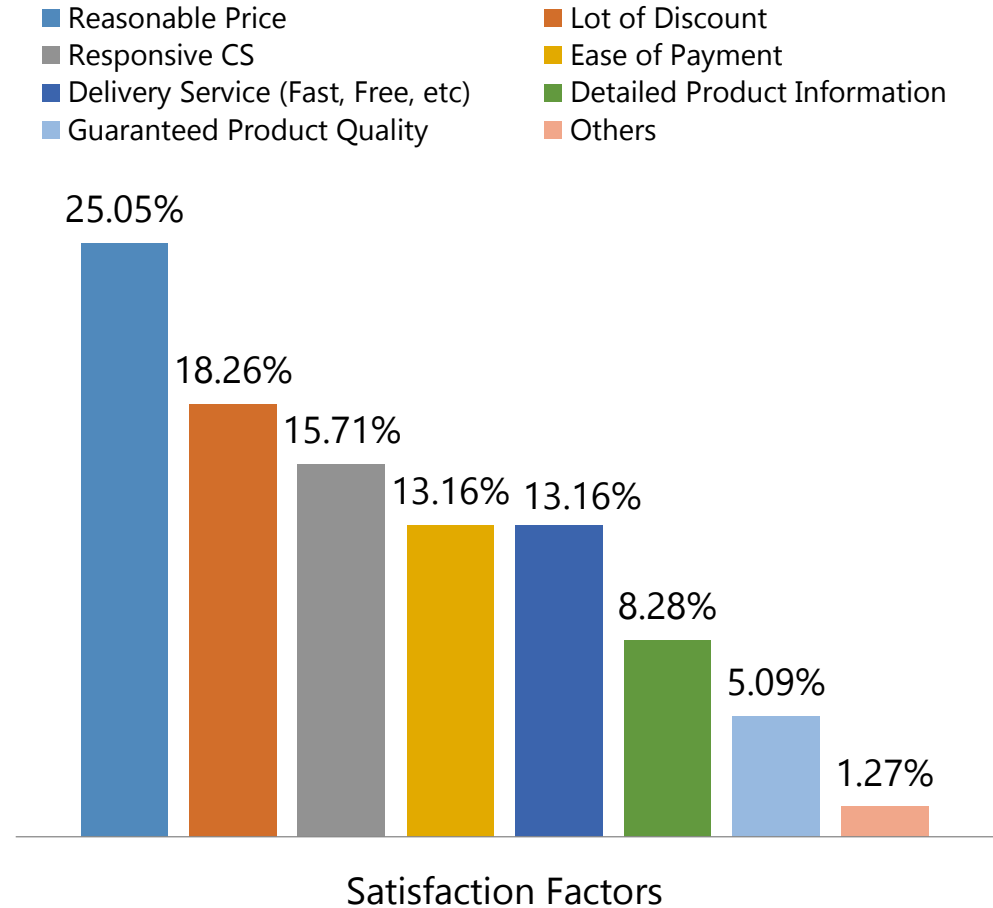


Duration of Problem Resolved



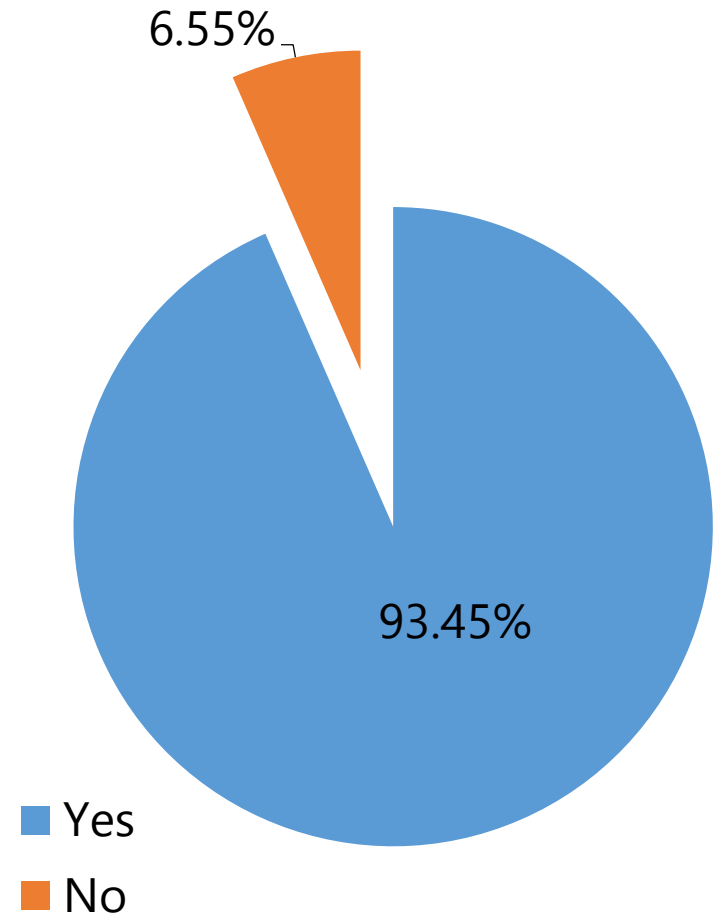
Satisfaction Factors

- The main reason of satisfaction with e-commerce services in Indonesia is Reasonable Price (25.05%) for many products sold.
- Followed by Discount (15.71%) and Responsive Customer Service (15.71%)



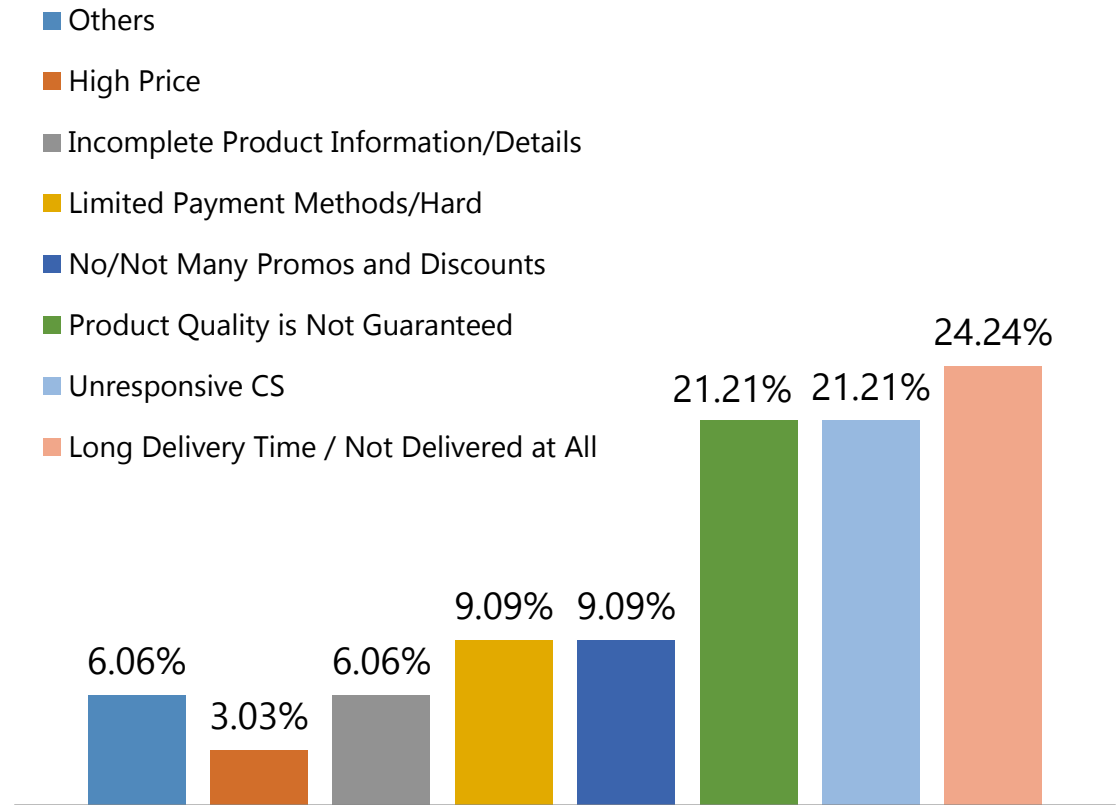
Satisfaction Level

93.45% respondent said they are satisfied with the e-commerce platforms in Indonesia.



Dissatisfaction Factors

- Main factor for dissatisfaction is Long Delivery Time/Not Delivered for product bought.
- Followed by the Unresponsive Customer Service (21.21%) and Product Quality not Guaranteed at all (21.21%)

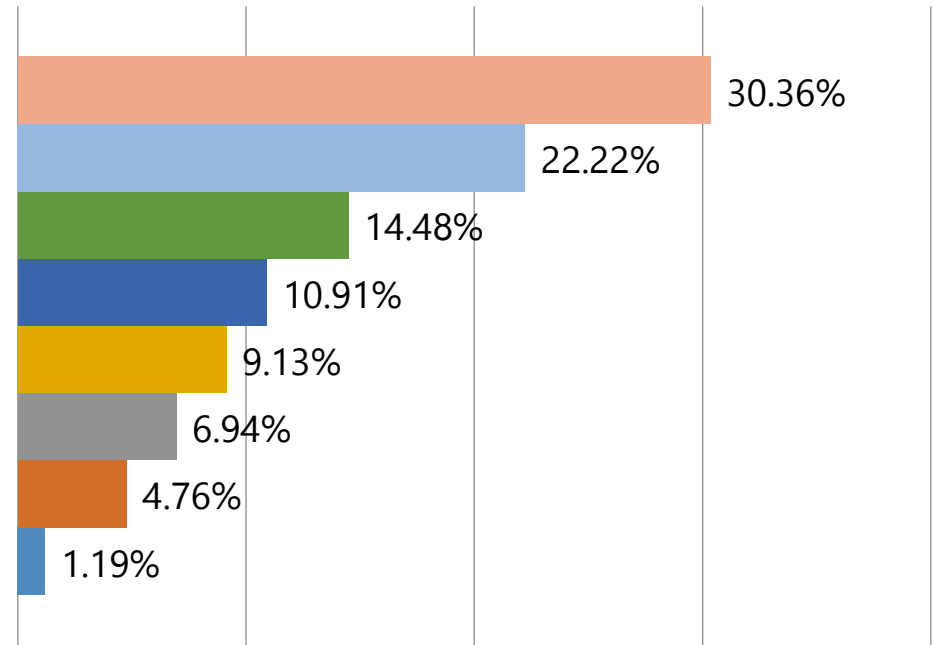


Dissatisfaction Factors



Things to Improve

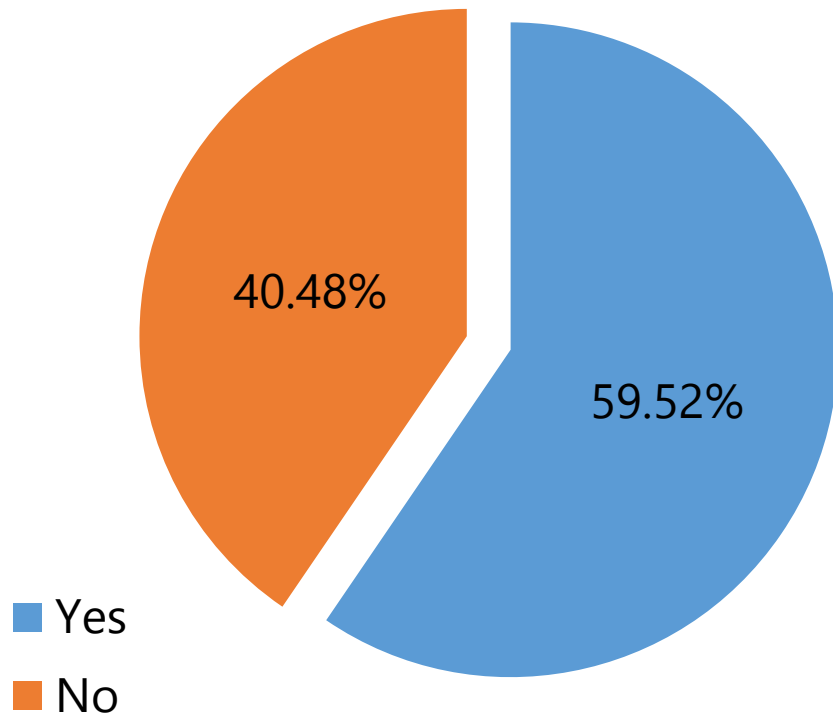
- **30.36%** respondent think e-commerce players should give more Product Promo Campaign/Discount.
- But Product Quality Assurance is important too, according to **22.22%** respondents.
- Customer Service should be more responsive.



- More Campaign Promo/Discount
- Product Quality Assurance
- Responsive CS
- Quick Delivery
- Speed and Ease of Access
- More Option for Payment Method
- Details and Complete Product Information
- Others



Willingness to Subscribe to the Newsletter



- 59.52% respondents are willing to subscribe to the newsletter.
- 40.48% still have no intention on subscribing.



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