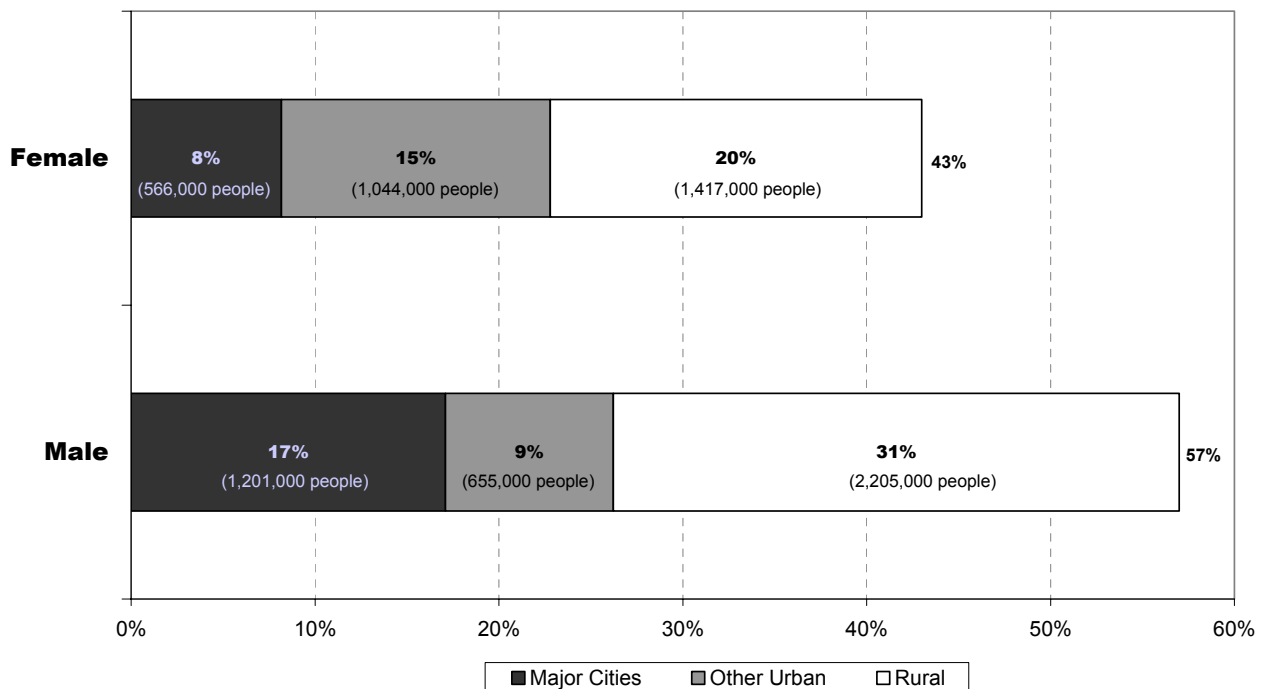


Women are Big Wheels, getting bigger.

More bad news for the macho male Indonesian. Of the 35 million motorcycle riders around the country, almost one in four are women. And that's going to tilt further in favour of women in the years ahead. As recently as two years ago, motorcycle manufacturers refused to recognise women as potential customers, probably because all the 'evidence', like ownership papers, were in the name of males in this male-dominated society. Yet, of all people planning to buy a new motorcycle in the next four years, 43 per cent are women, in small towns primarily. This is another sign of our times, regardless of male-biased loan or ownership papers. These findings are based on Roy Morgan Single Source, Indonesia's biggest syndicated survey with over 25,000 respondents annually, covering 90% of the population over the age of 14, from both Urban and Rural, including the Top 20 cities.

Let's look at the facts, key 'dots' to connect from a marketing perspective. The process is the same for any product category, regardless of motorcycles or instant noodles. First, the Big Picture. Of the 35 million riders, 60 per cent or 21 million are "main riders". That means there are 21 million motorcycles running around the country. Of these 8 million are "Used" motorcycles, of which 60 per cent are located in Rural Indonesia. Another 13 million motorcycles were purchased "New". What of the future? Currently, there are 7 million people planning to buy a motorcycle across the country. Over 3 million are women, of whom almost 2.5 million live in small towns as opposed to the conventional view that there is no life outside the Big City. To state the obvious, demand can be estimated by province, by Urban and Rural, by each of the Top 20 Cities. Then each of the major groups of potential customers, defined by their Opinions on motorcycle characteristics and influenced by their Attitudes to life itself, can form feasible segments or clusters.

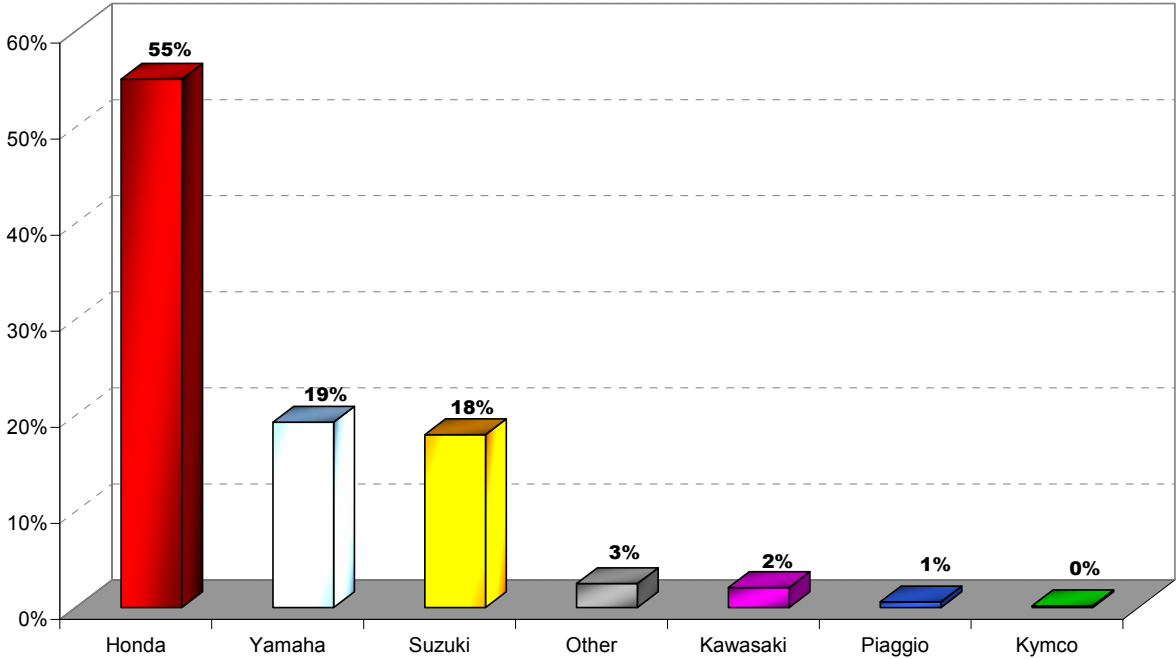
Demand for New Motorcycles



These groups need to be addressed from Product Design, Distribution, Pricing and After-Sales perspectives. To sharpen the focus from the Big Picture for the marketing folks, each of these identified groups of prospective customers can be quantified by level of interest and conviction, by brand of motorcycle. The same groups can be transferred to Roy Morgan Values Segments, an inbuilt tool that will take, for example, the 711,000 women prospects from “Conventional Family Life” who will “Consider a Yamaha” and directly link them to the Top 10 television programmes they “Really Love To Watch”. Like Bajaj Bajuri and Cek Ricek. Or the magazines they read, or the shopping malls they visit. Or the things they love to do, aspire to, worry about, other things they buy, and so forth... a 360-degree profile of the target consumer, as opposed to a Sales Director’s fictional stereotype or a Strategic Planner’s figment of imagination. Does that sound like a perfect science, almost? If it does, marketers will be pleased to know that every 90 days return on investments can be measured and analysed. New converts and switchers can be quantified and qualified, so further fine-tuning needs can be identified, actions taken and monitored cyclically, by all the stakeholders talking one common language. Finding that common language for all the stakeholders of a brand, whether motorcycle or instant noodles, isn’t impossible any longer. The only barriers are mental. By bring down those barriers, less money will be squandered. Shareholders will win, so will the consumer when better choices are presented more appropriately. Then, the old market dynamics will change.

FOR IMMEDIATE RELEASE

Current Marketshare: New Motorcycles



Great marketers and advertising professionals can turn a historical trend on its head. To create history, it's wise to understand history. It's time we stopped mouthing the buzzwords, stopped outwitting the less-knowledgeable with shallow versions of the truth. It's time to get real. Ever wondered why there are more set-top boxes for television audience measurement in Melbourne than there are in all of Indonesia? Despite which, the TV stations there use two target audience measurement tools today. More on that topic, next week. While costs will remain a limiting factor in Indonesia for many years, the amount of money being spent on advertising, without accountability, has got to be high by any yardstick. Available knowledge needs to be used, not buried because of hidden agendas or plain ignorance. Though I never worked for that global agency, I always liked their motto: "Truth Well Told".

Debnath Guharoy

The contributor is an advertising professional turned researcher and consultant, based in Melbourne. He has lived and worked across the Asia Pacific region, including Indonesia. He remains a regular visitor. Debnath.Guharoy@roymorgan.com

FOR IMMEDIATE RELEASE