



Lightning Talk | **[Mobile Marketing]** Mobile 2025: Indonesia's Path from Installs to Infrastructure



gomobile

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MOBILE 2025

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Indonesia's Path from Installs to Infrastructure





Mobile marketing agency,
founded in 2017

Global expansion in 2019

Self-service DSP developed
in 2020

10+ countries of
operations: EU, LATAM,
APAC and US

350+ people employed
across active regions

Transformation into
investment fund "**goahead**"
in 2024

Not related to GoTo group or Gojek, pure coincidence

3 in 1: PPF

**We remember the past to learn
Reflect on the present to understand
Foresee the future to prepare**

What we look at and note ourselves

GDP growth is the
slowest since Q3 2021

Rupiah depreciation to
weakest point since 1998
crisis

Eid al-Fitr Consumer
spending decline **12.3%**
on top of **34.4%** decline
in 2024

Coal exports hit 3-year
low and first recorded
deflation in **24 years**

Promoting brands
becomes more
expensive in absolute,
without spikes in buying
models necessarily

What Happened in 2025

GDP growth is the
slowest since Q3 2021
(4.87%)

Rupiah depreciation to
weakest point since 1998
crisis

Mobile is at re-evaluation state
(and not only mobile)

Eid al-Fitr Consumer
spending decline 12.3%
after 34.4% decline in
2024

Coal exports hit 3-year
low First recorded
deflation in 24 years

Promoting brands
becomes more
expensive in absolute,
without spikes in buying
models necessarily

Mobile:
A Catalytic Force in Indonesia

Indonesia the New Frontier for
Mobile Marketing

Indonesia records
Fastest Mobile Ad
Growth Globally

Indonesia is seen as
Southeast Asia's Ad
Tech Powerhouse

Indonesia: Digital
Advertising Market
Hits New Highs

01P

- 1 KPIs “Absorb the budget” and “Install Volume”
- 2 Scaling = success
- 3 Cost per Registration / Transaction = Innovating
- 4 Platforms optimised to lowest CPI and MAX volume (price dump)
- 5 Price dumping pushes ad networks to be middle man and resell again down the pipe, incentive buying models are applied
- 6 Fraud levels of 35% is common case, >50% raises questions
- 7 Agencies packaging “CPI” products

1 KPIs "Absorb the budget" and "Install Volume"

2 **Short-term image is great**, installs are scaling,
charts look like a golf clubs

3 Cost per Registr

4 Platforms optimised to lowest CPI and MAX volume (price dump)

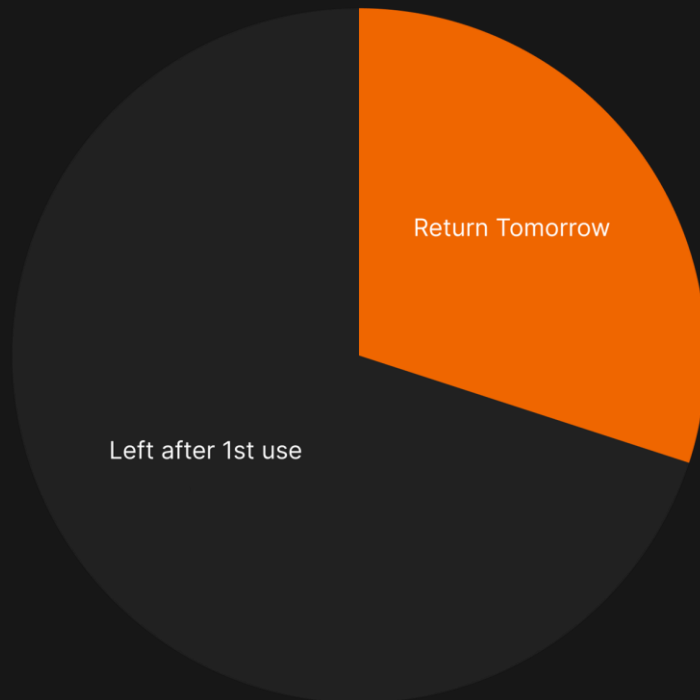
5 **Long-term image** after checking post-install
metrics - makes our hairs move, but we have a
solution to even it: need more installs

6 Fraud levels of 33% is common case, >50% raises questions

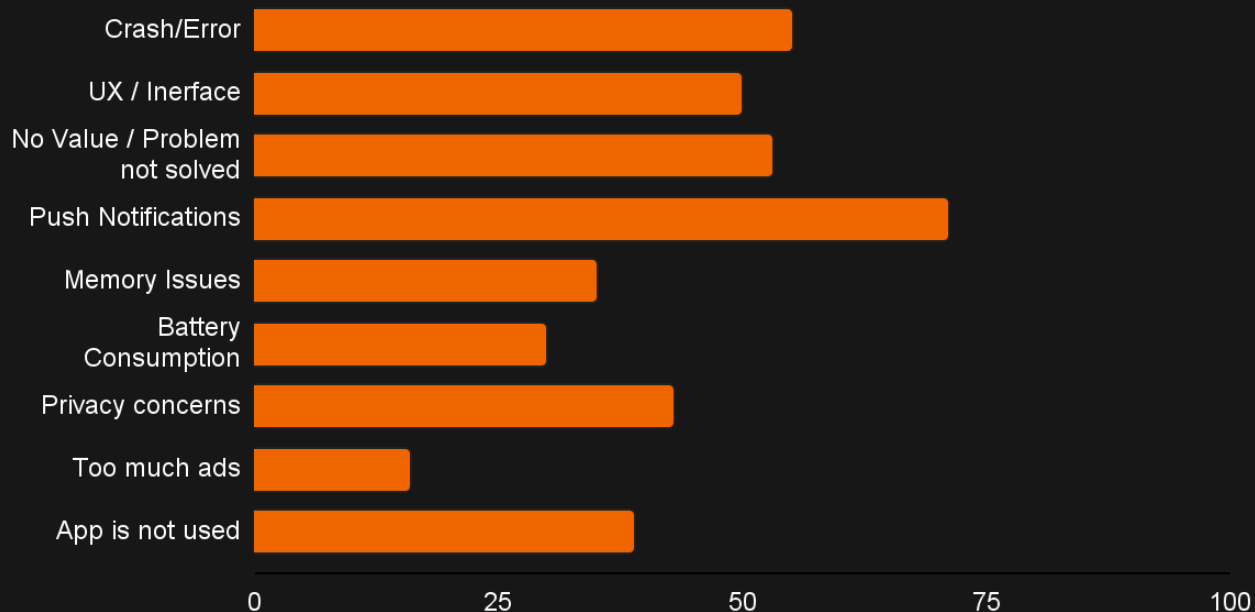
7 Agencies packaging "CPI" products

02P

Only 25–30% of Indonesian app users return the next day, other 70% drop off after their first use.



Uninstalls



02P

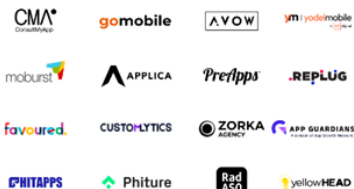
Agent A

- 01 Pushing agencies to take a “product manager” role
- 02 Rise of performance analytics, cohort tracking
- 03 Deep linking and LTV modeling
- 04 Retention and Re-engagement focus

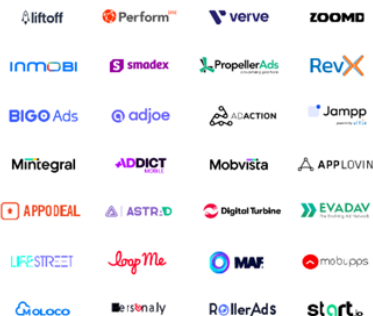
Agent B

- 01 From action actor to the action receiver
- 02 Managed in-app as way to achieve KPIs, not Business Goals
- 03 Lowest CPI as a core media buying model
- 04 >85% of budgets are directed to TT / Google / META

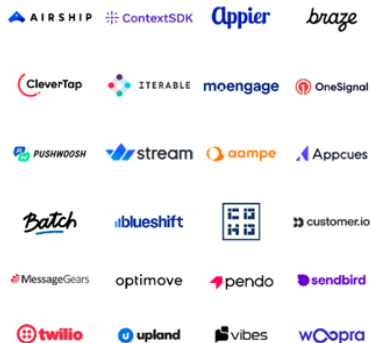
App Marketing Ecosystem 2025



Agencies



User Acquisition



App Engagement & Messaging Platforms



App Store Marketing



Retargeting



Product & User Analytics



App Market Intelligence



Alternative App Stores



MMPs



App Revenue (subscriptions & IAPs)



Experimentation & Mobile A/B Testing

Making one step down: MMPs

Feature	Adjust	AppMetrica	AppsFlyer	Branch	Firebase	Kochava
S2S Events	yes	yes	yes	yes	yes	yes
Custom Events	yes	yes	yes	yes	yes	yes
Organic Events	yes	yes	yes	yes	yes	yes
Custom attribution window for post-click and post-view	yes	yes	yes	yes	yes	yes
Impression tracking	yes	yes	yes	yes	no	yes
Pre-install tracking	yes	yes	yes	yes	no	yes
SKAdNetwork Integrations	50%	25%	100%	25%	25%	50%
Deeplinks	yes	yes	yes	yes	yes	yes
Deferred deeplink	yes	yes	yes	yes	yes	yes
Smartlinks	yes	yes	yes	yes	no	yes
Overview Report	yes	yes	yes	yes	yes	yes
Activity Report	yes	yes	yes	yes	yes	yes
Cohort Reports	yes	—	yes	yes	yes	yes
Raw Data Export	yes	yes	yes	yes	yes	yes
API Reporting	yes	yes	yes	yes	yes	yes
Agency Access / User Roles	yes	yes	yes	yes	yes	yes

Second step down: MMPs

Feature	Adjust	AppMetrica	AppsFlyer	Branch	Firebase	Kochava	myTracker	Tenjin	Singular
Multichannel	yes	yes	yes	yes	Google Play	yes	yes	yes	no
Cross-device	yes	planned for Q4 25	yes	yes	only via Google Analytics	yes	yes	yes	yes
Custom Dashboards	yes	yes	yes	yes	yes	yes	yes	yes	yes
Custom Reports	yes	yes	yes, +%	no	no	yes	yes	yes	yes
Creative Report	no	no	yes, +%	no	no	no	no	no	yes
Incrementality Reports	no	no	yes, +%	no	no	yes, +%	no	yes, +%	yes, +%
Antifraud	yes, +%	yes, +%	yes, +%	yes	yes	yes, +%	yes, +%	yes	yes, +%
Audience Segments	yes	yes	yes, +%	yes	yes	yes	yes	yes	yes
Advertisement Cost	yes	no	yes	yes	no	yes	yes	yes	yes
Ad revenue	yes	yes	yes	yes	no	yes	yes	yes	yes
iAP/Subscriptions revenue	yes	yes	yes	yes	Google Play only	yes	yes	yes	yes
LTV Predictions	yes, +%	yes	no	no	no	yes	no	yes	no

Or looking at fraud without generalization?

Click Flood

Fake clicks are used to make the last click, hijack attribution and assign it to the fraud source.

Click Injection

Click imitation before the app is fully installed, so the click is attributed to a fraud source.

Bots

Tool that can perform actions that are required from real users.

Installs Fraud (Device Farms, Emulators)

Imitation of clicks with malicious code, fake Device ID and IP addresses. Bot traffic in another form.

SDK Spoofing

Implementation of malicious code in the app for fake click generation and imitations of target actions that never happened.

Incentive Traffic

Completion of conversion action in exchange for a reward.

Or looking at fraud without generalization?

Click Flood

CTIT (Click to install time) is time from click to install.

If the metric value is more than 24 hours for a significant proportion of users (>60%), we consider such a group of users to be fraudulent

Click Injection

CTIT (Click to install time) is time from click to install.

If the metric value is less than 1 second for a significant proportion of users (>60%), we consider such a group of users to be fraudulent

Bots / Installs Fraud (Device Farms, Emulators)

We consider events free, if the income from them is always equal to 0 or is not specified (according to the data in MMP).

If no user from the group has committed such events, we consider such a group of installations to be fraudulent

SDK Spoofing

We consider the behavior of users to be the sequences of events they commit.

If all users in the group have the same sequence, we consider such a group of users to be fraudulent

Or looking at fraud without generalization?

Click Flood

CTIT (Click to install time) is time from click to install.

If the metric value is more than 24 hours for a significant proportion of users, then we consider such a group of users to be fraudulent.

Click Injection

Click injection is

such a group of users

Bots / Installs

Fraud (Device

Farms, Emulators)

We consider events free, if the income from them is always equal to 0 or is not specified (according to the data in MMP).

If no user from the group has committed such events, we consider such a group of installations to be fraudulent.

SDK Spoofing

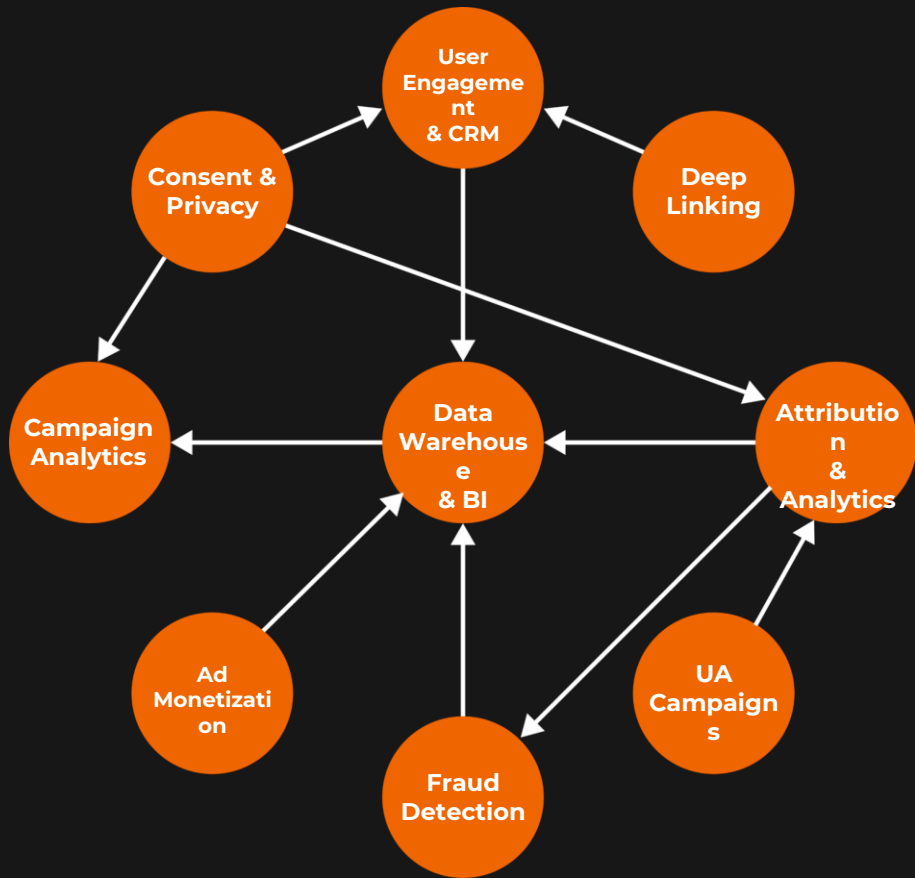
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Self check, realising: marketing in mobile is not mobile marketing

IF

Technical infrastructure is solved by various combinations of following pieces



Marketing part of infrastructure is primarily undergoing competition model change

03F

Rich Brand

Rich brand can afford to
allocated resource in branding
activities

Rich brand can
develop ad ecosystem
within, selling users
(users = inventory)

Rich brand focuses on
retention, loyalty and
cross-selling

Volume over value
option is available 24/7

03F

Poor Brand

Applies to the
application as sales
channel

Sales scale possible
from building mini-
ecosystems,
partnerships and
collaborations

Using micro-nano
influence to scale value
audience

Enormous amount of
efforts to ASO (think
SEO for application) to
improve search bump
(bump = sale)

03F

Rich Brand

- 01** Usual suspects: ecosystem, e-commerce, bank, telco
- 02** Can do anything (360)
- 03** Loyalty and differentiation focus

Poor Brand

- 01** Unable to buy volumes, no recency strategies
- 02** Laser focus on creatives (creative = new targeting)
- 03** Goals shift towards sales rather long-term loyalty (think brand)

Rich Brand

Brand

We agree with a suspicion that at some point brands won't be able to afford branding

02 Can do anything (360)

03 Loyalty and differentiation focus

02 Laser focus on creatives

03 Goals shift towards sales rather long-term loyalty (think brand)

Rich Brand

Brand

Yet we will see very exciting adjustments,
collaborations and tricks to evolve and survive

(especially from poorer brands embracing agent
a methods)

03

Loyalty and
differentiation focus

02

Laser focus on creatives
Goals shift towards sales
rather long-term loyalty
(think brand)

Wrapping

- 01 Install narrative has shifted towards infrastructure building, not only technical
- 02 Discipline of mobile marketing separated, variations of solution mixes to reach business goals
- 03 Not definitive, but still a risk of brands to not be able to afford branding in its traditional meaning
- 04 Unexpected alliances, competition models and tricks to use applications as direct sales channels
- 05 And yes, there was not a single mention of LLMs (AI) in this presentation

Make sure to take fortune cookies from our cocktail table.

and ask me anything in person