

Building the future:

Shaping Indonesia's AI Era

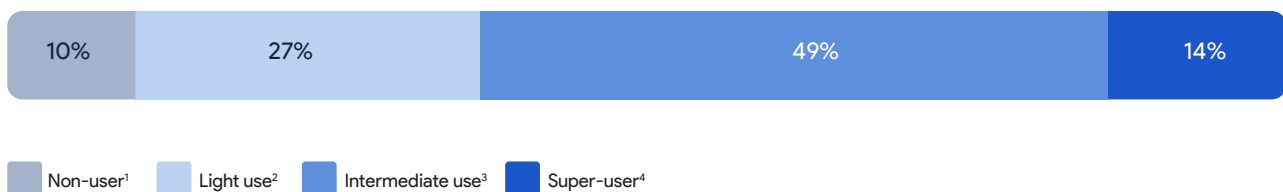


AI can boost Indonesia beyond **middle income status**.

Indonesia has achieved decades of strong growth, supported by a shift from agriculture and raw materials towards manufacturing and services. This has helped raise living standards, but the country now faces the challenge of moving beyond middle-income status. To sustain growth, Indonesia will need to build the skills, innovation capacity, and higher-value industries needed to compete in the global economy.

How Indonesia uses AI, by sophistication

Behavioural segmentation · share of all adults ·
Indonesia, March 2026



Indonesia's intermediate and super users combined are nearly 2/3 of all AI users (63%, compared to 46% in the US).

This group of capable intermediate users (49% of Indonesian AI users) are poised to advance. This is nearly half of AI users in Indonesia using AI for brainstorming, building out prompts with examples, comparing outputs from different AI tools, and asking AI to critique itself, relative to just a third of US AI users. It is sophistication of AI use, not frequency, that drives the biggest benefits.

SME catch-up

IDR 910tn

(US\$55 billion)
unlocked if SMEs use AI at the same rate as large enterprises, equivalent to **3.8% of GDP**.

Public sector productivity boost

+4%

boost to productivity of Indonesia's public sector from the impact of cloud and AI. This is equivalent to a saving of **1.1 hours a week** per worker, or **350 million hours a year** across the public sector.

New jobs from AI

510,000

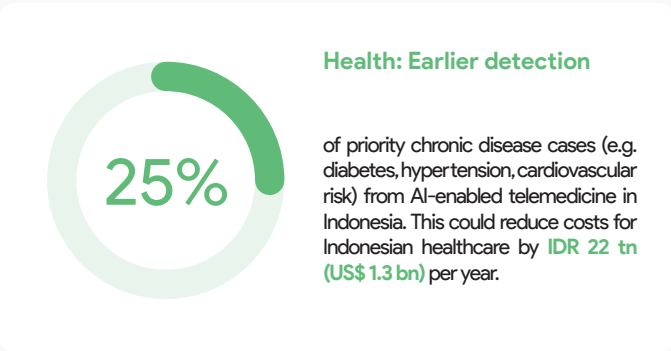
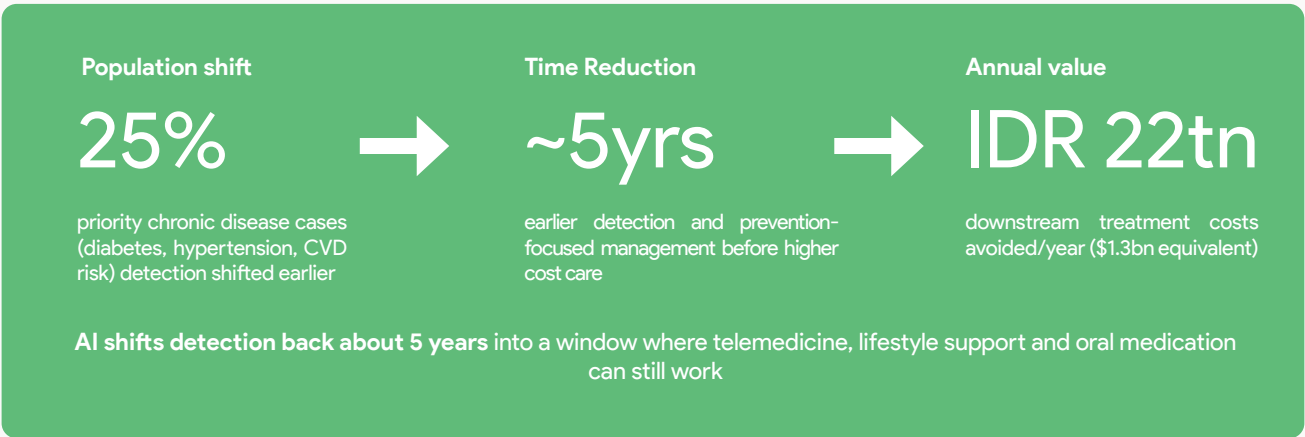
direct new jobs supported from the growth of AI-related sectors and businesses. AI is likely to not only augment existing work, but create new goods, services and jobs in the process.

- ¹ **Non-user.** Uses AI less than monthly. Often hasn't started at all.
- ² **Light.** Uses AI, but the repertoire is essentially "ask a question, get an answer". Has likely uploaded a file once (~61%) and may have brainstormed (~19%), but doesn't iterate, doesn't save prompts, and doesn't compare tools.
- ³ **Intermediate.** A genuine step-change. Roughly half the segment is now brainstorming, including examples in prompts, comparing outputs across tools, and asking AI to critique itself. The mode is still single-purpose use, but the toolkit is much broader.
- ⁴ **Super.** Looks qualitatively different. ~80%+ are meta-prompting, including examples, comparing tools and self-critiquing outputs. Around two-thirds delegate whole tasks, automate daily routines, and have paid access. Their relationship with AI is a working partnership, not a search-engine substitute.

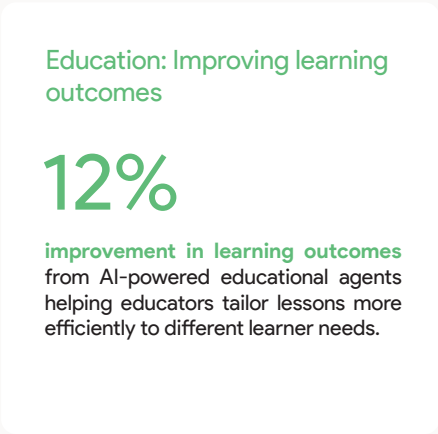
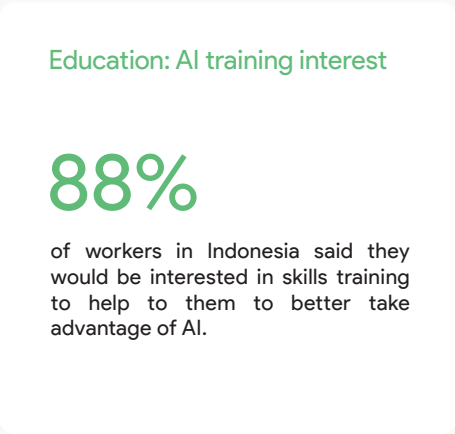
Enhancing Indonesia's health and education with AI.

AI can support a new model of public service delivery in Indonesia, helping to address gaps in access to healthcare and education. It can enable more personalised learning, support clinical decision-making, accelerate medical research and drug discovery, and help patients better manage their own health.

AI in health: benefits in disease management and life expectancy



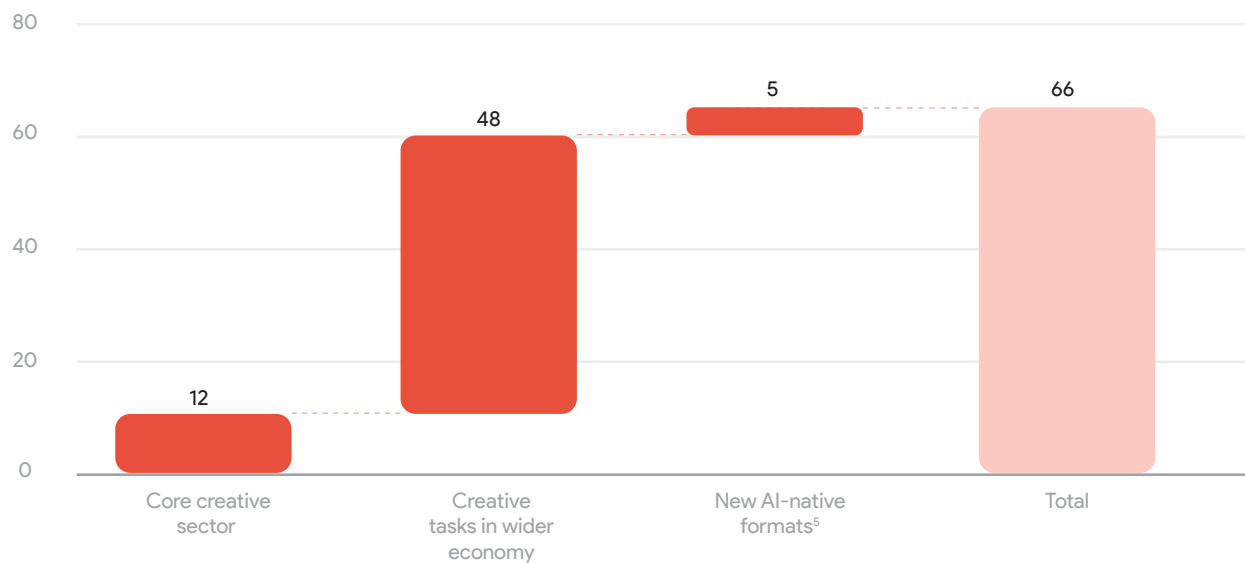
AI in education: benefits accrue to both educators and learners



Supercharging Indonesian **creativity** with AI.

Indonesia's creative economy is a major growth asset. Generative Media AI tools can help further unlock creative potential: boosting productivity and innovation in the creative sector, enabling more people to become professional creators and helping with creative tasks across the economy. The impact on creative tasks in the wider economy could be still larger - up to **4x larger** than within creative occupations alone.

Economic potential of Gen Media tools (IDR tn)



Creative & media

IDR 66tn/yr

(US\$4.1 billion) per year in economic potential from full deployment of AI-powered generative media tools.

New creators

1.8 mn

estimated new professional creators enabled by Gen Media by 2035.

Improved productivity

390 hours

saved per year – the equivalent of 50 working days – for creative sector workers.

Creative & media

+30%

estimated overall increase in formal creative sector jobs over the next decade.

Making it easier for creators to reach the world.

Digital platforms like Google Play or YouTube have helped lower the barriers in distribution, making it possible for smaller companies or individual creators to reach the world. Generative Media tools look set to accelerate this trend further: AI could help Indonesian creators and SMEs reach larger international audiences by reducing barriers to production, marketing, and distribution, and by enabling translation and localisation at scale.

Indonesia app reach: overseas potential

App download and revenue metrics for Indonesian publishers. Source: Sensor Tower.

Reach

36% of app downloads come from overseas

690m overseas downloads out of 1.9bn worldwide



Value

1.9x overseas revenue per download vs domestic

Revenue per download



110% overseas revenue relative to domestic
Rp400 bn (\$24m) overseas vs
Rp370 bn (\$22m) domestic

63% publisher overseas reach
A base of Indonesian Play developers that have overseas users

Indonesia has a deep domestic base, with **1.2bn app downloads** at home. Overseas downloads are **36% of total**, yet overseas markets already generate **110% of domestic revenue** and **1.9x revenue per download**, pointing to headroom for AI-enabled localisation and export growth.

Creative exports

IDR 6.7tn/yr

(US\$410 million) per year unlocked by AI-enabled creation & localisation, helping creators reach global audiences faster and adapt content for overseas markets. By automating and scaling subtitling, dubbing, translation, and format adaptation, AI makes it easier to export Indonesian content at speed.

Increased reach

+480%

Increased reach for Indonesian-speaking creators enabled by AI-based translation.

Case Study: Vidio

Vidio is Indonesia's largest streaming platform, with **5 million paid subscribers** and **20 million monthly viewers**. The company takes a hybrid approach to AI: the creative team leads on story, scripts, and characters. AI tools accelerate the production and editing work.

Working in partnership with Google, Vidio built proprietary AI tools that have transformed their operations. For example, finding, editing, and posting clips for social media went from **6–8 hours** to **five minutes**.

The impact on content production has been just as striking. AI-assisted animation enabled Vidio to produce a new season of a children's series in **half the time** and at **lower cost** than the previous year, while maintaining creative control. The result: a **93% increase in audience share**, moving from **#11 to #6** in the prime-time TV rankings.

