

Indonesia's Digital Gateway:

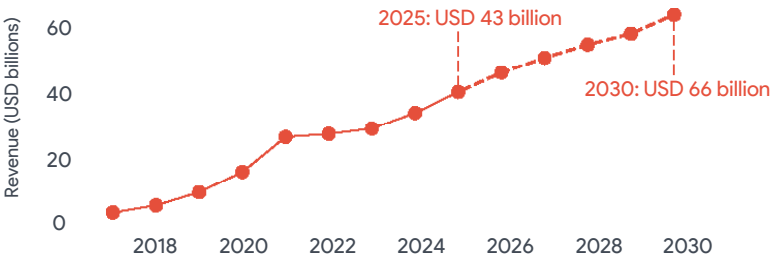
The Economic Impact of Google Play and Android in 2025



Google Play and Android power Southeast Asia's largest digital economy.

Indonesia is Southeast Asia's largest digital economy, and Play and Android are a key driver of its growth, connecting developers and businesses to hundreds of millions of customers across apps, e-commerce, and the gig economy. With revenue from AI-enabled apps growing 127% year-on-year in 2025, the highest among ASEAN countries, Indonesia's digital ecosystem is accelerating fast.¹ Over the next five years, the Play and Android economy's impact is set to grow by more than half.

P&A ecosystem revenue projected to grow by over half (55%) over the next five years



IDR 700 trillion

In 2025, the Play & Android economy generated USD 43 billion or IDR 700 trillion in revenue for app publishers and the wider economy in Indonesia.

Building a globally connected developer economy

Indonesian publishers make up the 5th largest number on Google Play globally, are increasingly finding international audiences, with 63% having overseas users. This has been driven by the growth of casual and hyper-casual gaming studios targeting global markets. While the domestic market remains much larger, significant growth in overseas downloads signals Indonesia's steps towards becoming a competitive app exporter in the region.

250k

direct, indirect and spillover jobs

250 direct, indirect and spillover jobs created by the Google Play app ecosystem in Indonesia, an increase of 26% compared to last year.

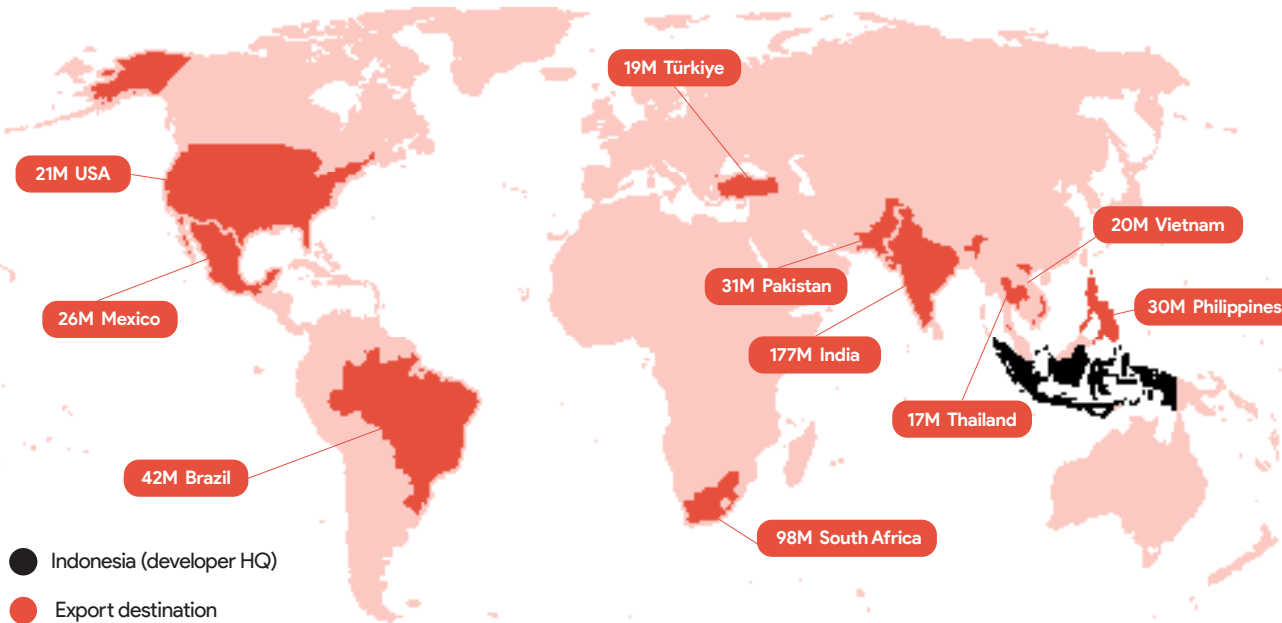
1.2 billion

domestic downloads

Domestic downloads of Indonesian-made apps grew 45% year-on-year to 1.2 billion. Meanwhile, overseas downloads increased by 360% to 690 million, up from just 150 million in 2024.

Top app export destinations for Indonesian developers, 2025

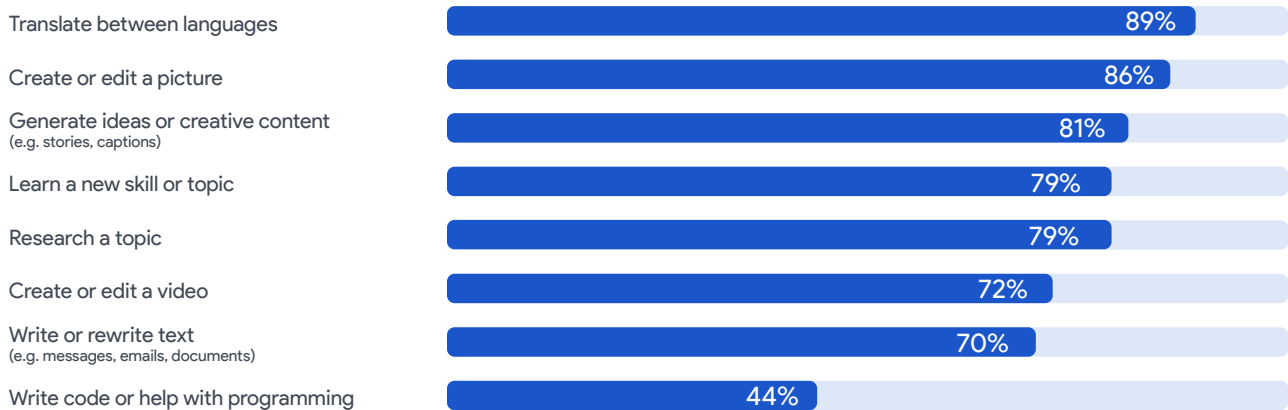
Overseas downloads in millions by consumer market



Android is bringing powerful AI tools to millions of Indonesians.

With Android powering nearly nine in ten devices in the country,² Google's AI tools reach Indonesian users where they already are: on the phones they use to work, learn, shop, and communicate. Gemini's integration into the operating system means AI capabilities surface naturally within everyday tasks rather than sitting behind a separate app, and that easy access is translating into rapid uptake.

Gemini most popular for translation and photo editing



Share of Gemini users

4.5

hours/week

4.5 hours per week saved on average by Android Gemini users using AI tools for everyday tasks on their phones.

86%

trust Android

86% of users in Indonesia trust Android as a platform to access AI tools and features.

71%

interested in vibe coding

71% of people in Indonesia - the equivalent of 103 million people - say they would be interested in using AI tools to vibe code their own app.

Boosting innovation and efficiency for Indonesian developers

For Indonesian developers, many of whom operate in resource-constrained environments, AI tools can help reduce development time, automate routine tasks, and support faster iteration. These efficiency gains are enabling teams to focus on innovation and scaling their products.

↑ 33%

On average, we estimate that AI tools could increase Play and Android developer efficiency by 33% each year, the equivalent to annual productivity gains worth USD 860 (IDR 14 million) per developer.

7.4hrs/wk

7.4 hours per week saved on average by Play app developers in Indonesia who use Google's AI tools, helping them compete in global markets.

92%

of Play app developers who use Google AI tools in Indonesia agree that they were helpful in launching their app internationally.

97%

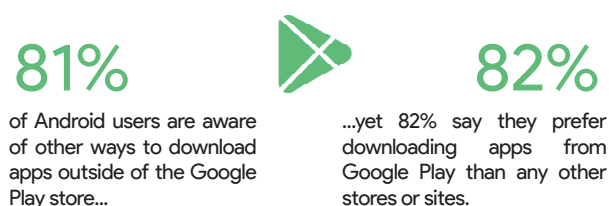
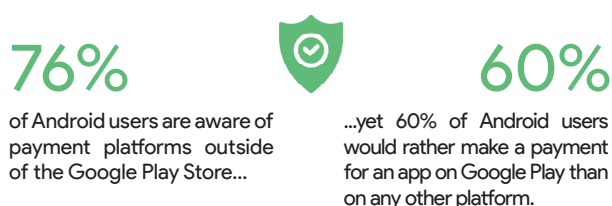
97% of Play app developers who use Google AI tools in Indonesia say that using AI tools has directly or indirectly helped them generate more revenue.³

Building trust, safety, and choice in Indonesia's digital ecosystem.

As hundreds of millions of Indonesians come online for the first time, maintaining trust in digital platforms is essential. With 85% mobile market share, Android devices are becoming the digital gateway to payments, public services, and entertainment in Indonesia. And its security guardrails are helping Indonesia's growing digital population participate with confidence.

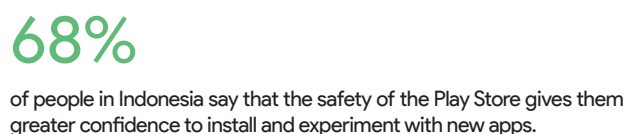
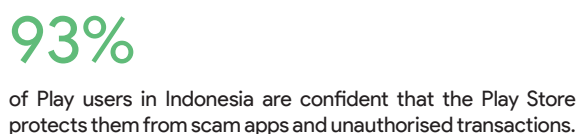
Play offers extensive consumer choice

Google Play gives users multiple options to download apps externally and use a range of payment methods. Users are well aware of their choices, but high trust means they continue to prefer Play.



Users have confidence in Play and Android's security

The prevalence of sophisticated phishing scams is making Indonesian users anxious about accidentally compromising their data. Google is committed to building the safest and most trusted platform, addressing user anxieties while ensuring openness and user choice. This resonates with its users, who regardless of age, gender, income levels and region of residence, overwhelmingly report great confidence across device and platform security.



Users are most confident in a range of different security features on their Android device



Protecting families and enabling public services

As children increasingly access smartphones for learning and entertainment, parents value tools that help manage content and online interactions. Google Play Age Assurance uses AI to estimate user age and automatically apply safety settings, while Android is how most Indonesians access government services.

