

KANTAR

Reimagining the Future

Understanding life and trends in Indonesia

August 2020



Your KANTAR team today



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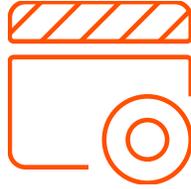


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Before we start....



Please refresh the link in case it stalls



You will receive a recording of the webinar post the session to watch on demand and the copy of the presentation



Please feel free to ask your questions in the Q&A box and we will try to address as many questions as possible at the end of the webinar or via email post the webinar

Our Agenda today

- 1 Where are we today?

- 2 How are people responding to crisis

- 3 How is it reflected in six important facets of their life?

- 4 Relationships

- 5 Work

- 6 Money

- 7 Leadership

- 8 Health

- 9 Entertainment



Authentic empathy requires perspective taking

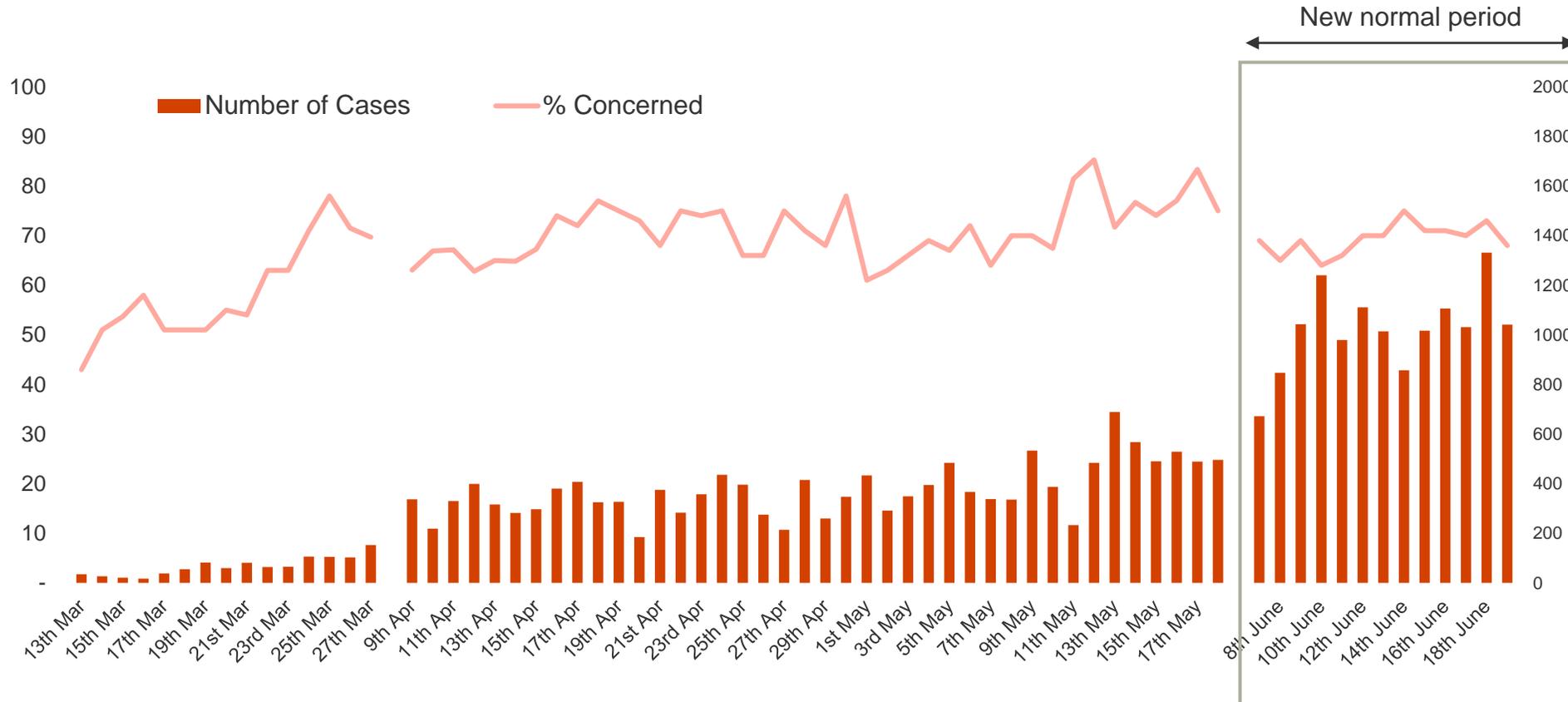
We have learned from the fourth wave of the Kantar COVID-19 Barometer that consumers are looking for expressions of authenticity and empathy across Indonesia – whether it is from their brands or leaders.

Genuine understanding requires a deep immersion into what it means to be human in times like these.



Amidst the rising number of cases, there's no significant influence into consumers' anxiety during new normal period

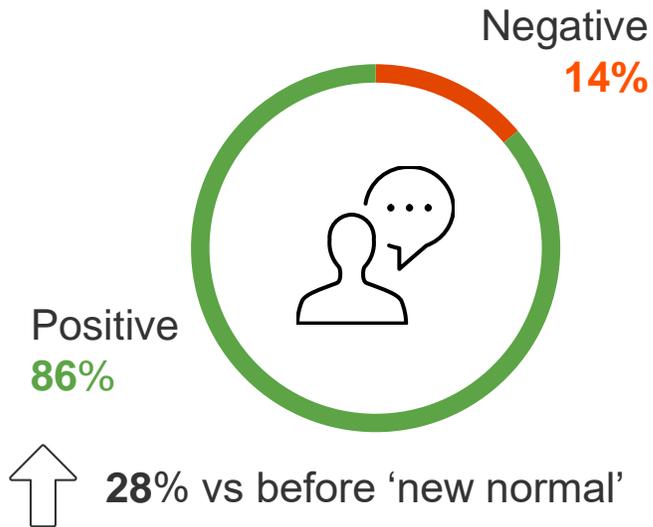
Small fluctuations depending on daily movements



Instead, consumers are quite enthusiastic in embracing the new normal with immense support for government's plan

Sentiment

Based on social content



Base: 662,612 posts

Source: Social Media Listening

Conversations

Based on social content



As life opens up, individuals often fall on a spectrum between 'surviving' and 'thriving', dependent on the material impact that lockdown and PSBB has had on them

SURVIVE

THRIVE



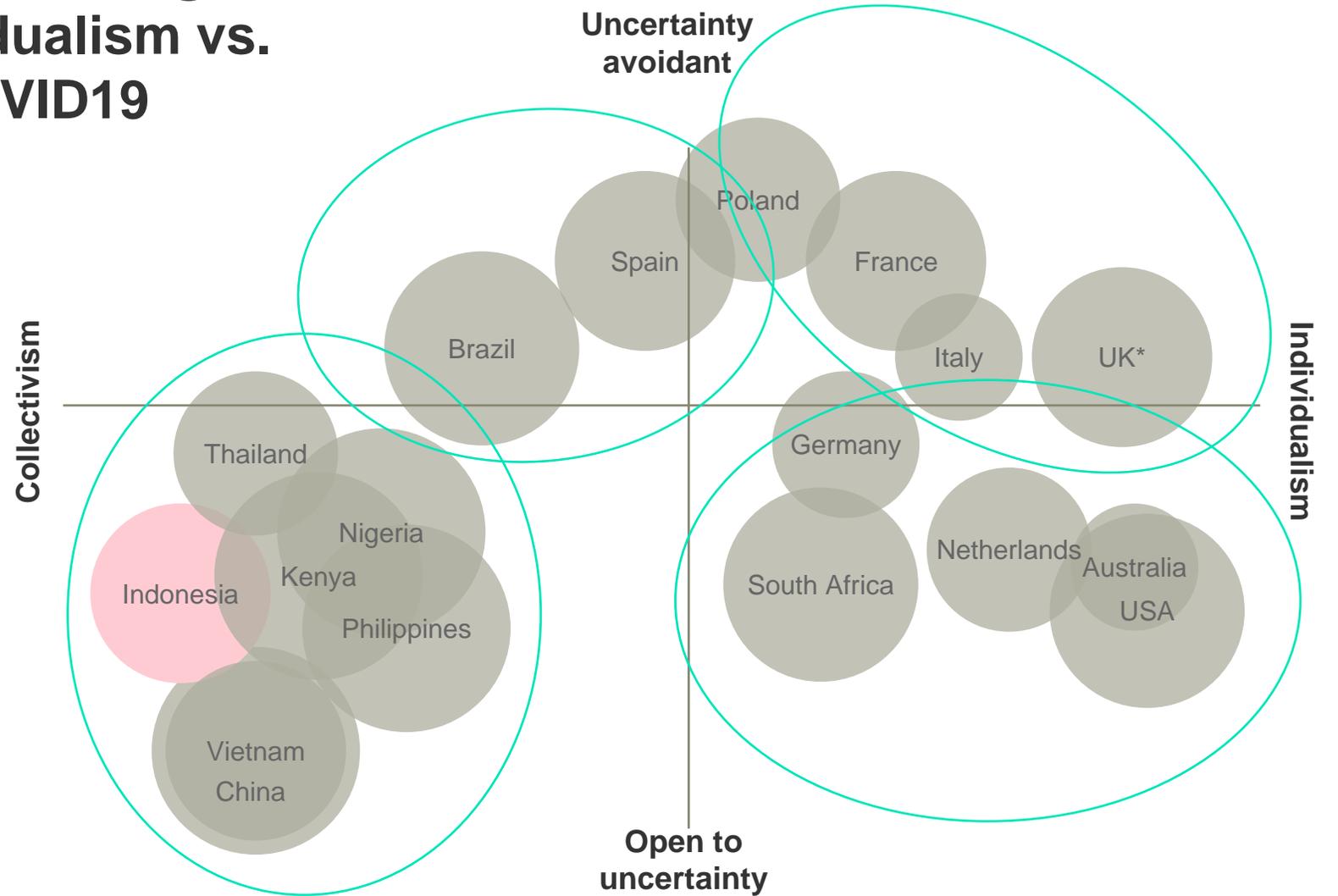
Cultural differences around dealing with uncertainty and individualism vs. collectivism can impact COVID19 responses

Collectivism – Individualism

Everything is about “I” versus everything is about “we”

Uncertainty avoidance - openness

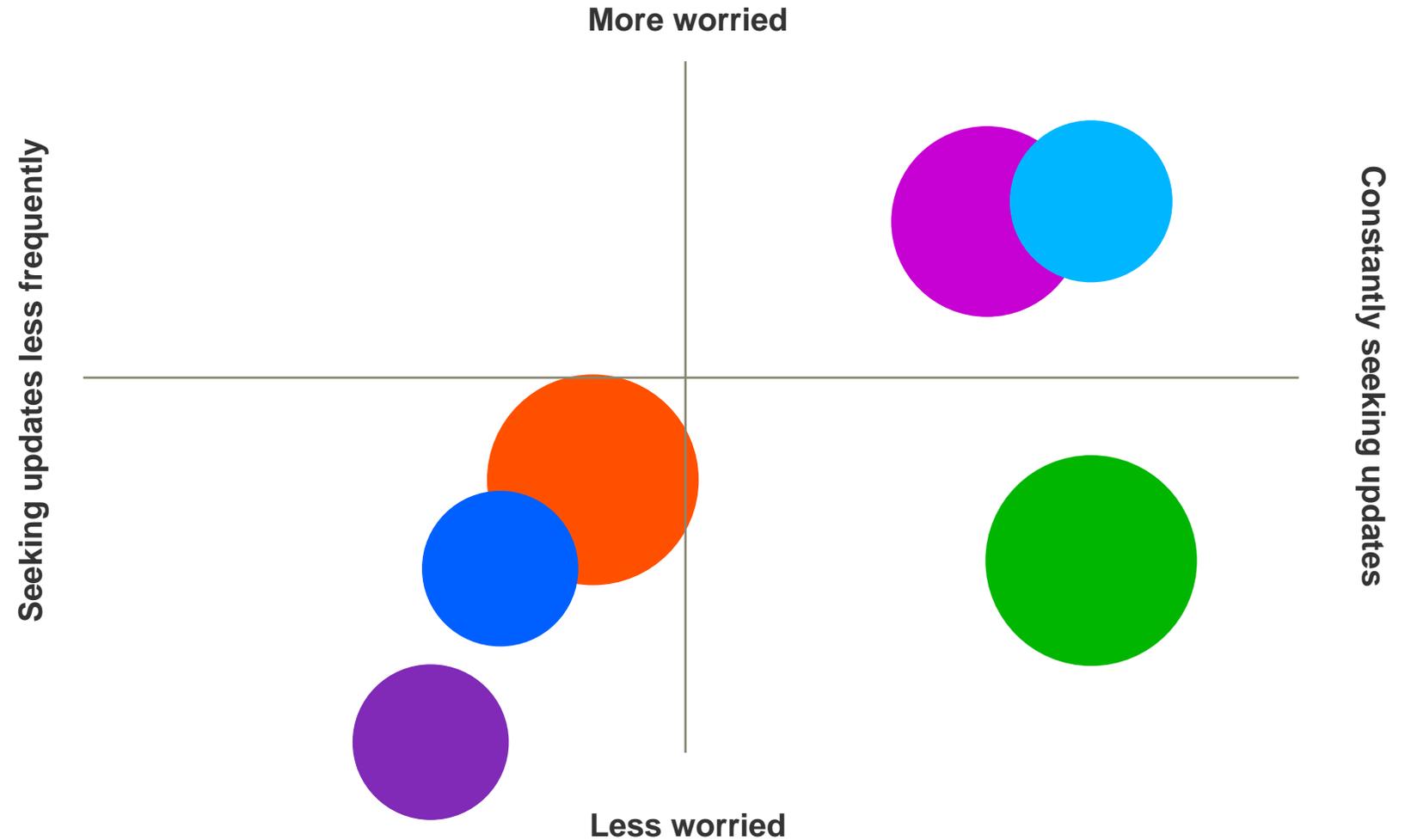
Their avoidance of risk versus openness to change and uncertain situations



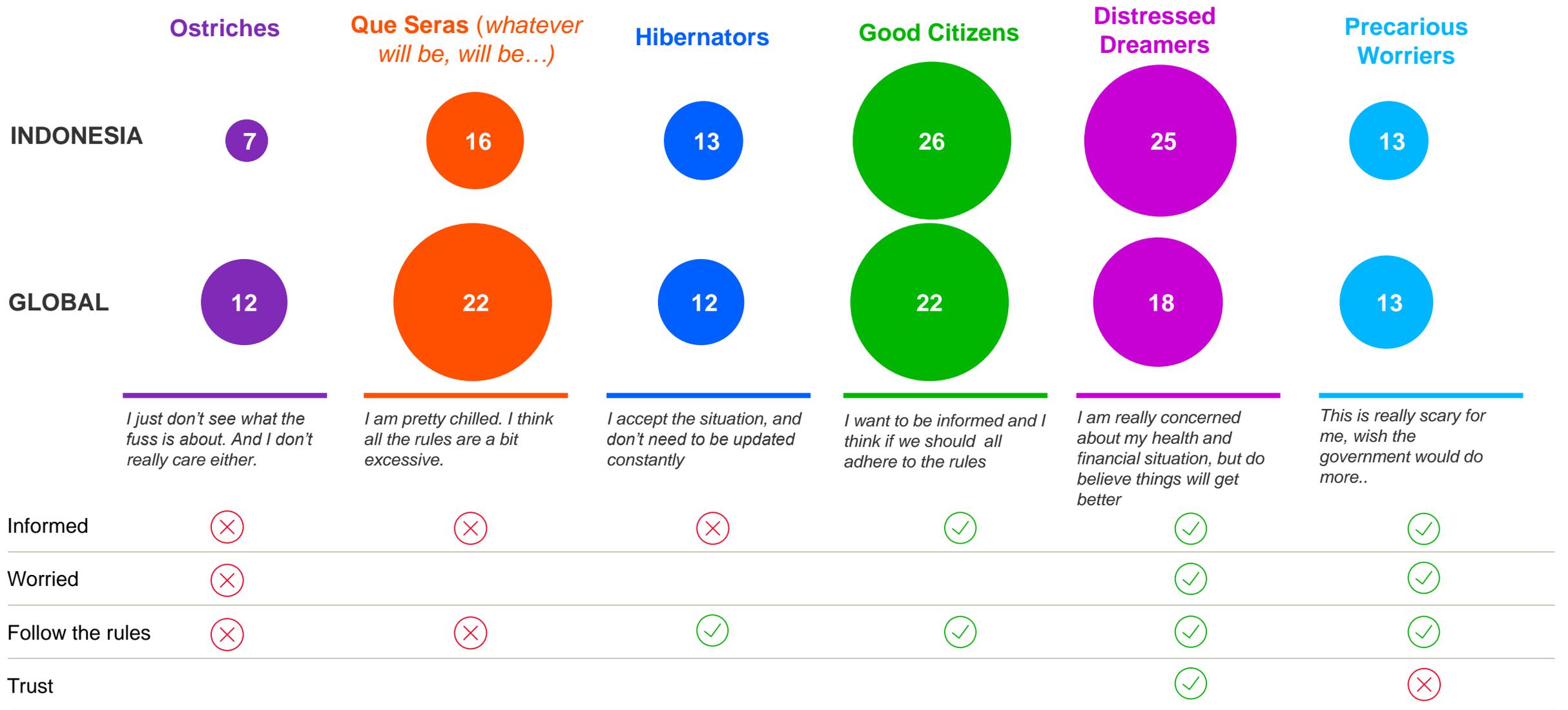
Our six C19 Tribes differ on two key dimensions

1 The degree of concern they feel

2 Their drive to keep up with the latest COVID-19 news



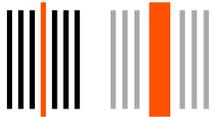
Indonesians have largely been compliant good citizens or distressed dreamers



We looked at markets through key value dimensions (Hofstede, Hall)

And then went onto look at how this underlies current COVID-19 behaviours and future tensions ...

Power distance



Do existing social hierarchies or egalitarian attitudes influence on the ground realities for people?

Individualism versus collectivism



Does a culture with a focus on oneself versus an emphasis on group welfare impact behavioural response?

Low context versus high context



Are rules, norms and expectations within these societies explicit, or is behaviour enacted from a shared understanding of expectations - what does this mean during the COVID-19 crisis?

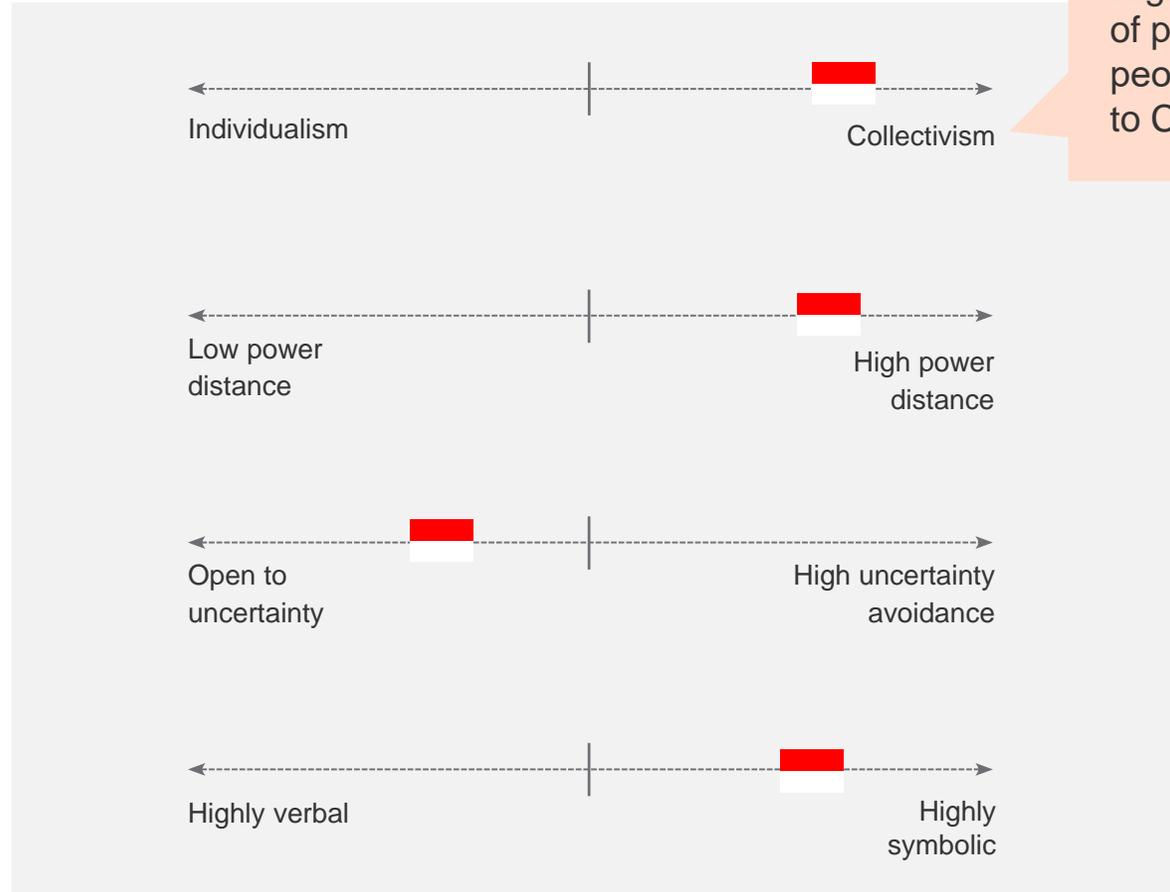
Openness versus aversion to risk



How open or averse is the culture to risk and what does it tell us about cultural response toward crisis management?

Understanding cultural codes

Indonesia

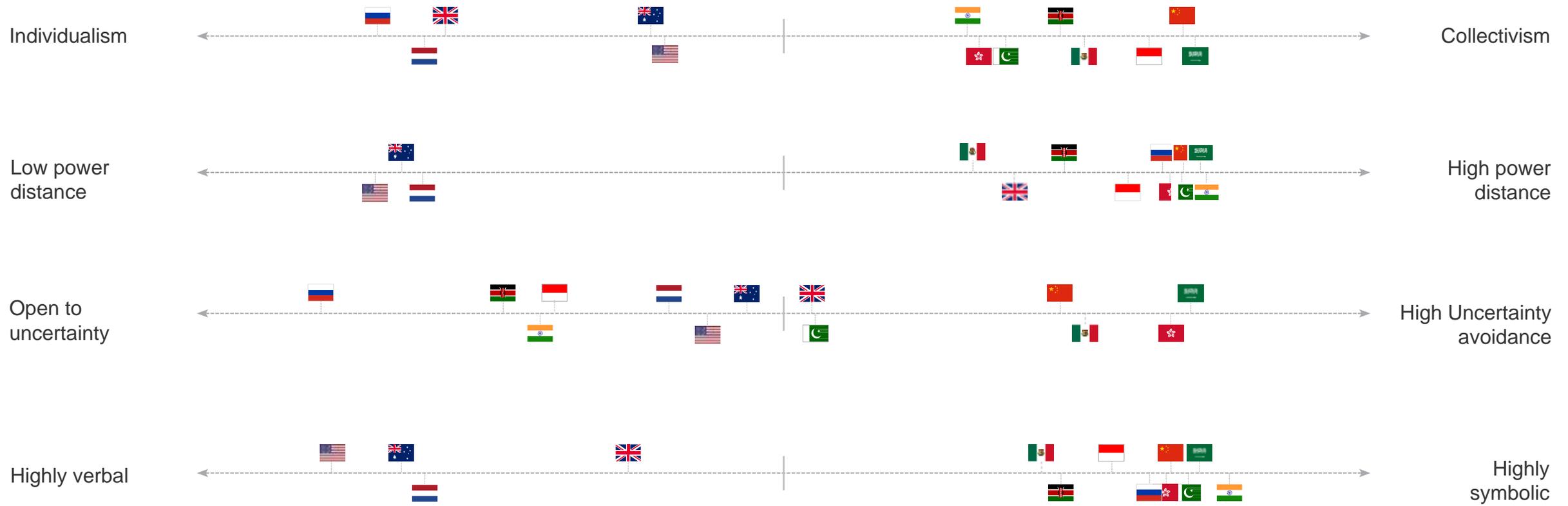


High collectivism made 80% of people will be angry at people who didn't adherence to COVID-19 norms

According to COVID-19 Indonesian Tribes, Indonesians tend to be "Good Citizen" and "Distressed Dreamers" as a well-informed and cautious person.

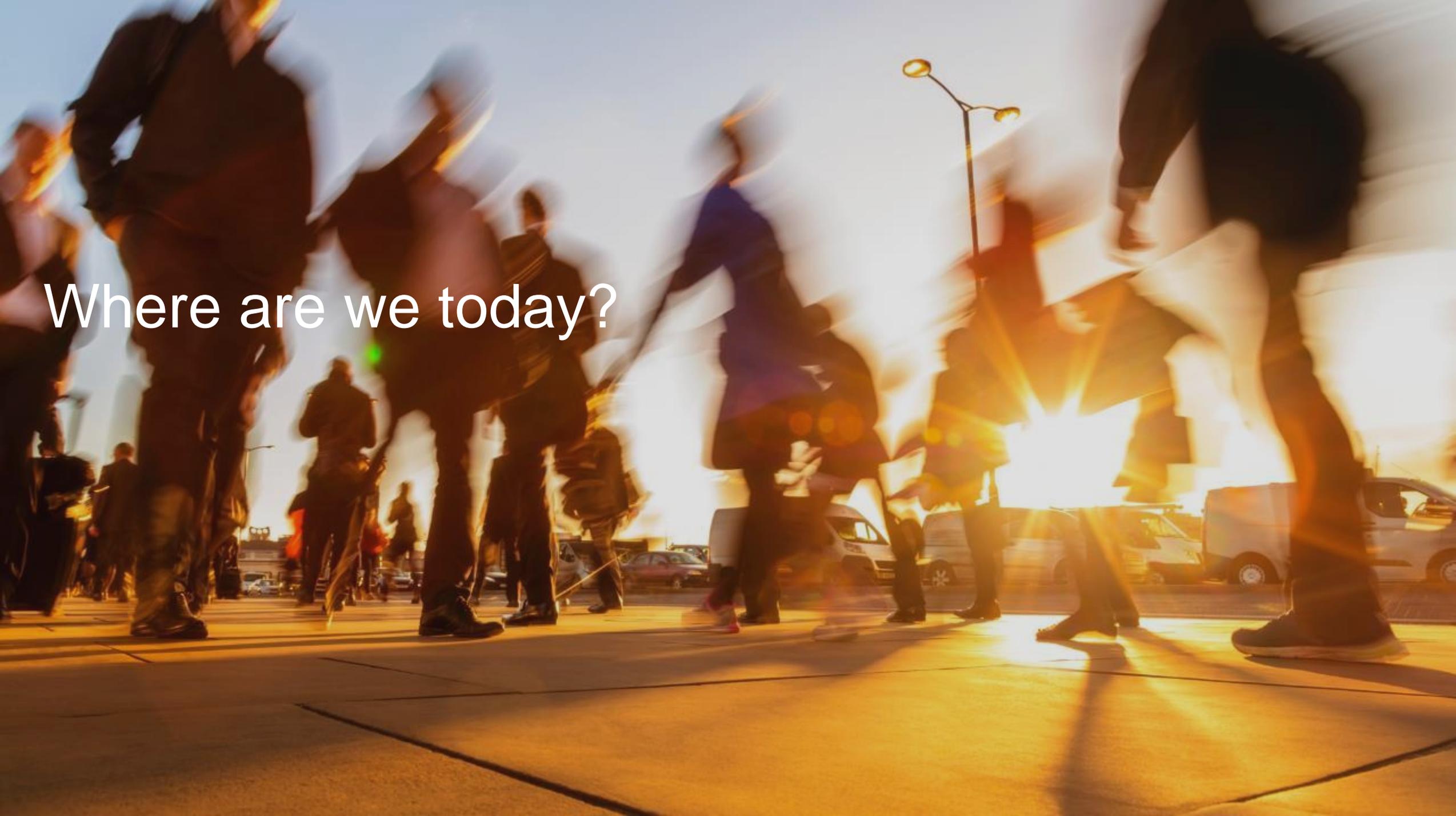


How the markets compared



Select country for further info





Where are we today?

Social media bubbles have given way to physical bubbles

16%

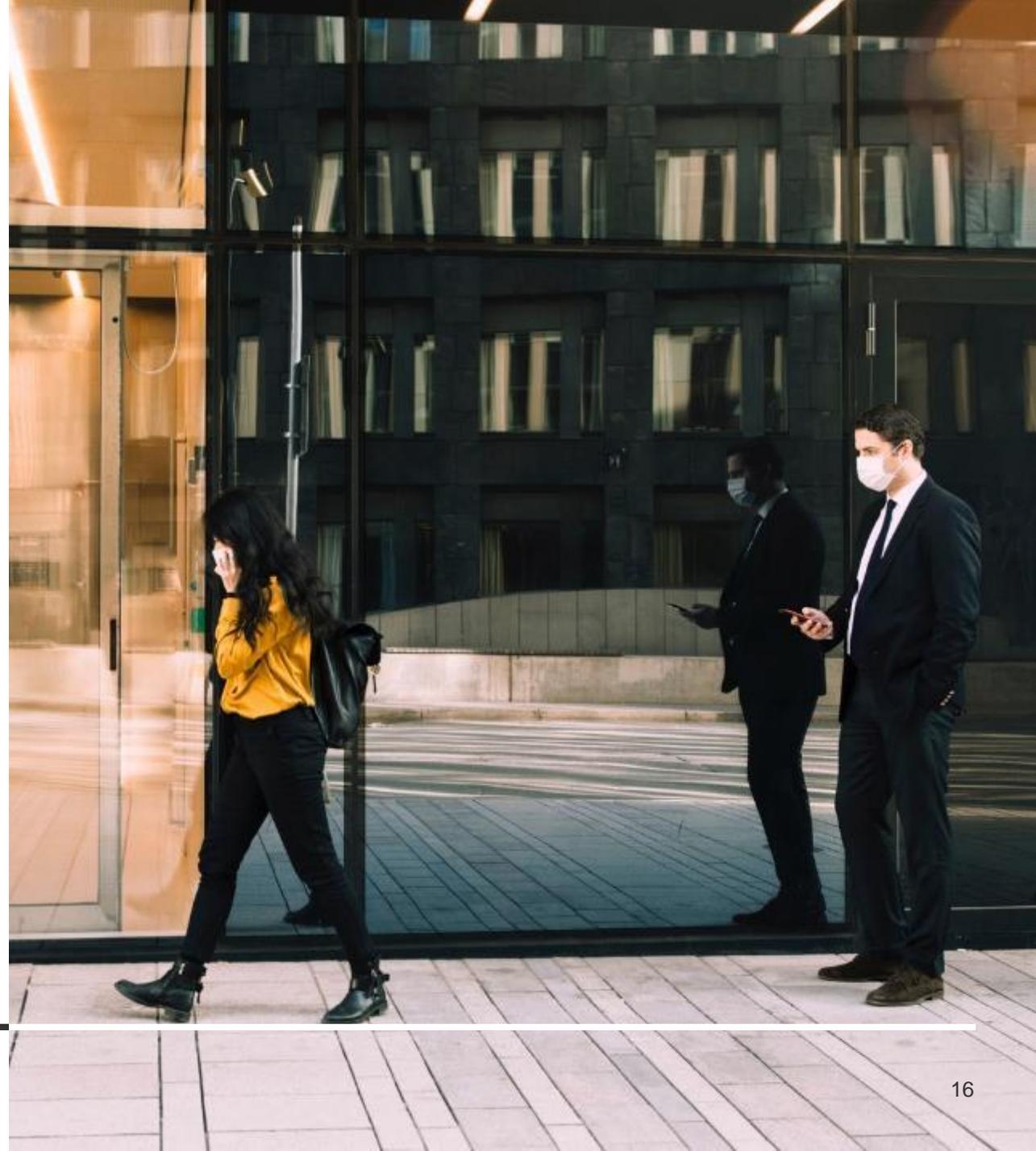
of Indonesians can't wait to get back to office

We see less of the outside world (except what we see through media).

We spend more time with (and talking to) people we know.

But unlike social media bubbles, these bubbles stifle us and we are eager to meet the outside world and go back to the familiar.

“ *I miss going to the office, I even miss the traffic!* ”



Quarantine fatigue is setting in

Zoom-fatigue and news-fatigue has set in. Invasion of physical space is pronounced as people spend more time together in smaller spaces.

“ *I need to juggle between work, meetings, kid’s assignment, and house chore, I need my free time.*

I want to go to school and hang out with my friends. Online learning is boring and full of homework

”



The home is now the centre of everything and is not set up for it

No other time in history have we seen the convergence of work, childcare, school, socialising, media consumption, shopping channels etc. localised to our homes.



Despite this, people are keeping themselves busy

72%

of Indonesians are trying new recipes

69%

do exercise more to manage their mental health

The loss of a familiar routine has been refocused in other ways, with some distractions and some serious upskilling initiatives.

“

I have never touched the kitchen, now I even try cooking!

I watch my first K-drama in all time!

”



The system has not backed us

We are afraid for our lives

According to COVID-19 Barometer, 15% claimed they have become unemployed because of COVID-19 situation.

Each of us has experienced some form of vulnerability
Our income has been threatened

3 Bulan Corona, 3 Juta Orang Kena PHK Dirumahkan

NEWS - Cantika Adinda Putri, CNBC Indonesia | 03 June 2020 19:41

24 Hari Tutup, Tanah Abang Rugi Paling Sedikit Rp4,8 Triliun

CNN Indonesia | Selasa, 14/04/2020 18:27 WIB

Home / Money / What's New

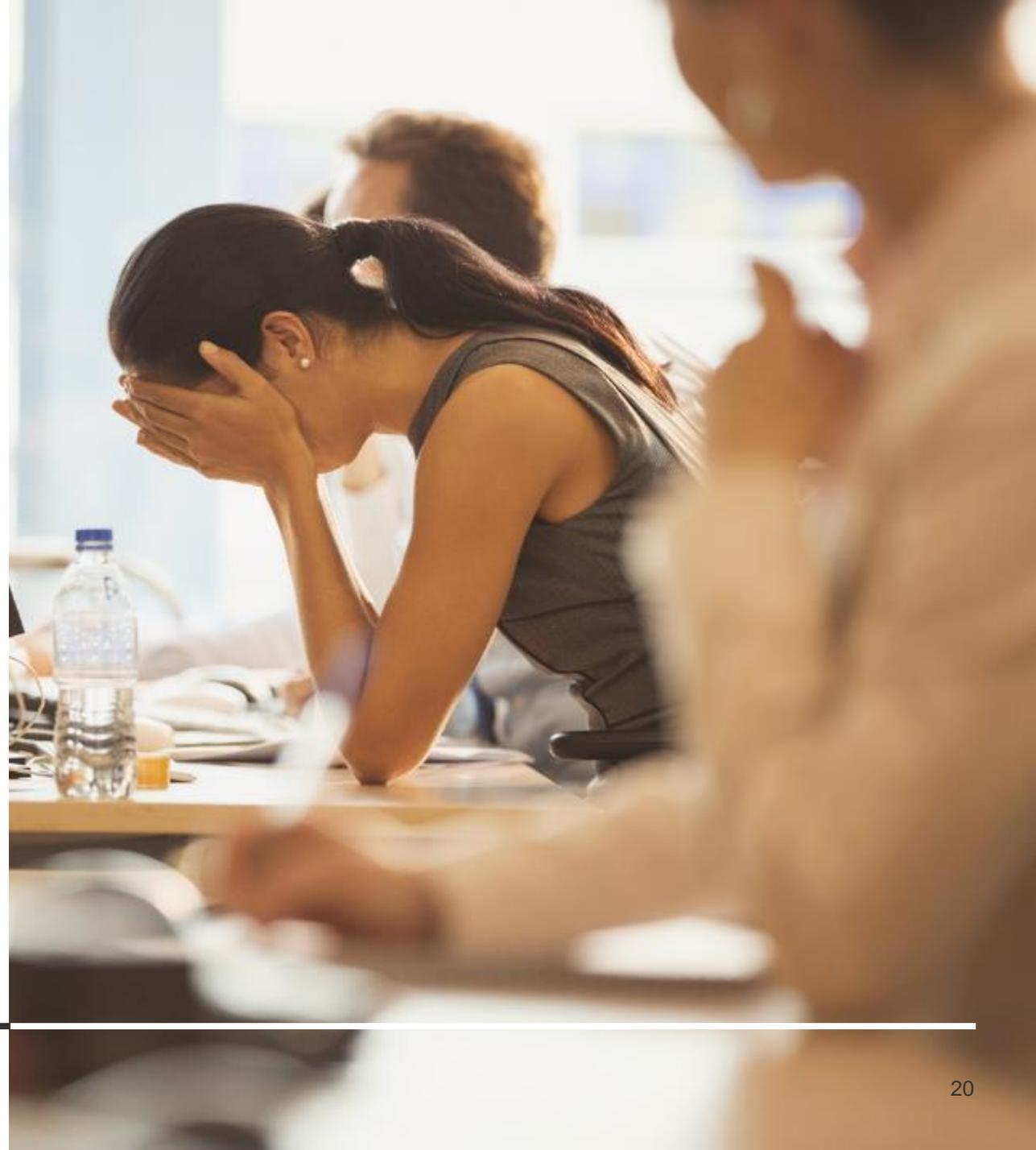
4 Perusahaan Startup Lakukan PHK Akibat Covid-19, Apa Saja ?

Kompas.com - 24/04/2020, 13:25 WIB

Ribuan Hotel Tutup, Industri Pariwisata Rugi Rp 60 Triliun

Selain itu, terdapat 253 restoran dan tempat hiburan. Sektor pariwisata memang terdampak pandemi corona.

Oleh Febrina Ratna Iskana
16 April 2020, 16:43



Our living circumstances are not all equal

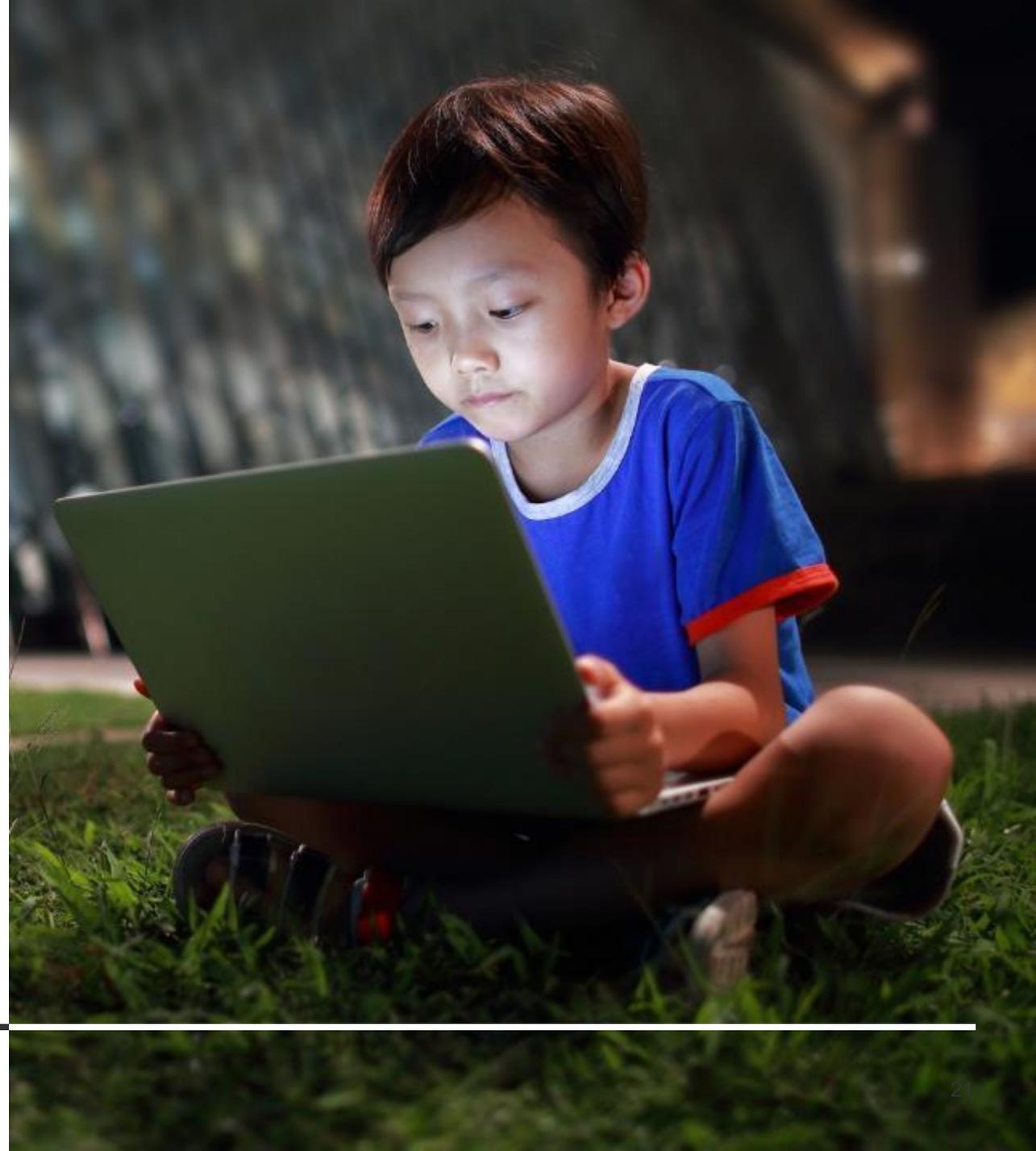
Our children's education has been threatened

31%

of Indonesians want school/colleges to re-open



“ *Online learning means I need to be a co-teacher for my kids, the teacher can't really control and teach their student through online—the system is not fully prepared for this.* ”



We have lost control of time

Mental and physical health has suffered due to the disruption of routine and access to alternatives.

Almost 50% of Indonesians are looking forward to meet their friends so they tend to do make more of an effort to stay connect with others while stay at home

“ Doing quarantine is exhausting, the flexible time at work is killing me, I still received email and call late at night. I miss going out with my friends. ”

We are not even safe at home

If you are a woman, lockdown life could be about trading one safety issue for another.



HASIL PENELITIAN
Adakah kekerasan yang dialami perempuan dalam ranah personal/KDRT selama masa pandemi COVID-19?

- Ada sekitar 80,3% (233) responden melaporkan bahwa hubungan mereka dengan pasangannya semakin tegang, dimana mereka yang mempunyai status menikah lebih sering (12%) daripada yang yang tidak menikah (7,5%).
- Usia 31-40 tahun adalah kelompok yang paling banyak menjawab bahwa hubungan dengan pasangan menjadi lebih tegang sejak pandemi COVID-19. Lebih jauh lagi, jika dikermati berdasarkan penghasilan responden, terdapat 2 kali lebih banyak jumlah responden dengan penghasilan di bawah 5 juta Rupiah yang menyatakan bahwa hubungan dengan pasangan semakin tegang sejak pandemi COVID-19.
- Pada perempuan lebih banyak mengalami semua jenis kekerasan dibandingkan laki-laki. Selama Pandemi COVID-19 secara umum kekerasan psikologis dan ekonomi lebih umum dialami oleh responden daripada jenis kekerasan lainnya. Untuk kekerasan psikologis, 15,3% atau 289 perempuan menjawab kadang-kadang mengalami, dan 3,5% atau 66 perempuan, menjawab sering mengalami.

KOMNAS PEREMPUAN

Vulnerability is the powerful, universal emotion of the times

“

I feel bad for the kids, they need to have outdoor activities and social interactions with other kids. But with this condition, it's impossible for me to let my toddlers play outside the house, and I'm running out of ideas to keep them happy and secure with staying inside the house.

I'm overwhelmed with all the news and social media post about COVID. I decided that I need to step away from all the news for some times to keep me sane.

I was given no job with no pay until I don't know when, and I have not so much on my savings

Doing school from home is exhausting, piled up homework with short deadline, can barely focus on online class, and can't see my friends. I miss hanging out with my friends.

”



We have coped with vulnerability by searching for connection and community

63%

of Indonesians expect brands to donate their advertising space for charities

Volunteering to make a difference. Helping each other is the way to cope and survive in this difficult time

“

Me and my friends is doing charity, distributing mask and other medical aid to people.

What I appreciate about my neighborhood is the way we help each other. As simple as sharing food and checking each others condition.

”

Organizing at a community level for mutual support (Neighbourhoods, Residents', Welfare Association).

“

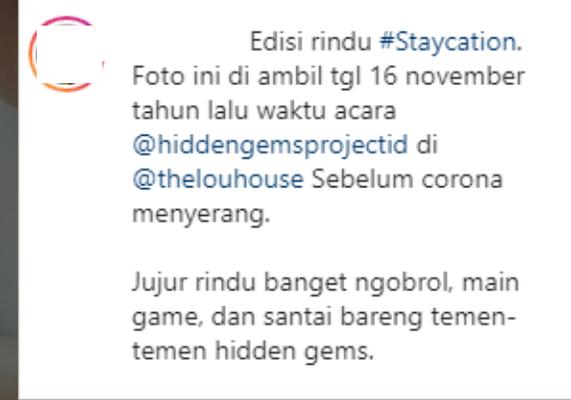
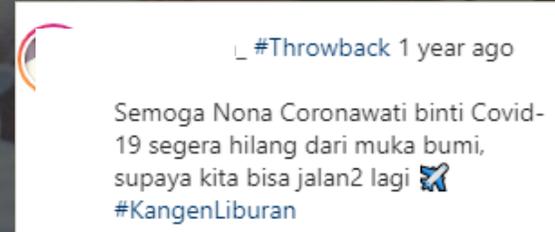
My community is trying to protect the residents, we doing local lockdown and giving food and aid for those whose in need.

”

Charity as a part of religious beliefs in Indonesia.

Nostalgia and anchoring in the good old days is another coping mechanism

Words might not show it, but many posts in social media show that a lot of people is becoming nostalgic and craving for familiar and enjoyable things.





Our response to the PSBB is to either slow down and be mindful, or to keep ourselves busy and ignore it

And we expect brands to mirror the appropriate sentiment to connect with us





After a period of prolonged isolation, what kinds of lived (emotional, functional) after-effects are we going to see among people?

Examining our lived experiences in the midst of an existential crisis



RELATIONSHIPS



WORK



MONEY



LEADERSHIP



ENTERTAINMENT



HEALTH



Relationships

Strong connections allay feelings of vulnerability

Relationships

- In an uncertain, scary world in which people feel vulnerable, the **family unit provides a predictable comfort** and safety
- Strong relationships have **new-found depth and reward**; fresh appreciation for those most dear
- **Caring and taking care of each other** is the minimal contribution to society
- **Feeling connected to a community** shapes mindsets and behaviors; and results in a stronger sense of self



“

I rarely have time with my family on weekdays. I used to come home late or busy doing travel-work. Now I have a lot of time with the kids, we spend time in the kitchen cooking together on weekdays.

I am closer to my little sister now, doing home quarantine make me realize that I have a lot of similarities and enjoy spending time together at home.

Throughout the pandemic, I have developed a better relationship with my neighborhood. We barely spoke before, but now it seems that we need to take care of each other, just as simple as saying hello, sharing foods, and asking their condition.

”

Due to pandemic, people have realized that current **challenges can only be overcome by support and kindness** within each other



Hadapi Era Normal Baru, Anteraja Bagikan 50.000 Masker Gratis



Conversations

Based on social content

“Let's Support the **New Normal** by following the health protocol discipline so we can stay healthy & maintaining the economy #NewNormalDemiRakyat” – Twitter User

“For some people, the opening of the mall might sound exciting, but don't forget to stay **#DisciplineFollowingNewNormal**” – Twitter user

New Normal is a way to restore people's economy. #HelpTheCountrytoovercomepandemic” – Twitter user

Though in smaller scale vs Ramadhan period, movement on donation is still being trend amongst Indonesians

Not only supporting government, Indonesian netizens also remind each other about the new protocol

More people spending time at home and being more creative and used their time creating something

● Localism as a form of protection, a way to help each other

People are enabling communities to thrive. Lots of home and local business is starting during this pandemic and people are helping each other to ensure the sustain of the business by **promoting or buying from local business**



Conversations

Based on social content



“ With this WFH situation, me and my family decided that we will open our own small restaurant. We enjoy cooking and we can also be more independent with our income. It's also good that we can share the food with people who in need in the society

I saw a lot of my friends on IG are posting their selling, as a friend the least I can do is reshare it as a promotion or buy it.

”

Brands need to showcase a truly **‘connected and kind’** world while ultimately infuse its role in the story



Stronger sense of interdependencies

▶ Cadbury – This doesn't need to end



Alluding the new sense of one-ness, helping each other and supporting each other.

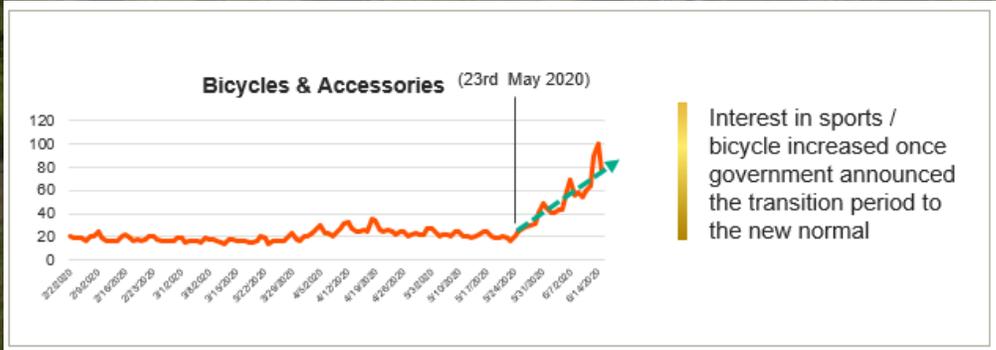
▶ Brooke Bond Red Label



Demonstrates the role of brand in celebrating and inspiring interdependencies

The paradox of belonging in a world where many are never apart – and some can never be together

The bicycle community phenomenon shows how Indonesians are longing for connection with others, yet still prioritizing safety above all



- While togetherness provides mutual support, there is a **need to balance 'we' time with 'me' time** especially in homes with space limitations
- Being at home everyday means **more bonding/family time**, but that also means it **can create more frictions** between family members as you stuck with each other all the times—shown from increasing pregnancy rate and also divorce rate
- Social circles both expand and shrink
- More discerning approach to social relationships – few but strong

Brands need to find new ways to facilitate the needs of connection, while staying relevant and intimate with consumers



Intimacy re-defined

▶ Three - Monster Hunter



Three showcases how distance is not a barrier to feel close with the loved ones

▶ Nivea Care – Soft connects us all



Nivea Care triggers thoughts of new expressions of showing we care and love

As people discover new things about each other, **new avenues of respect and empathy emerge** - both in our homes and in our communities

Genuine empathy is increasing, many have newfound **respect for each other's roles**, and gender roles are less rigid

- Household work – female still doing most of the job, but males are seeing / appreciating daily tasks more
- A slight movement to more balance in the household between providers and caretakers.



“ Staying at home for months make me realize that for all this time my wife was doing a hell lot of jobs taking care for this family.

Now I get the chance to spend more time with my kids and observe what they do. I can see for myself how hard their schoolwork is and give them help.

”

Brands need to portray consumers in more relevant way, given the evolved tension in their daily life



Self-Discovery of Identity and Meaning



Nestle – Terima Kasih Ibu



Nestle sharing **appreciation to mothers** through showcasing how the role has evolved



Relationship behaviours that the pandemic has shaped

New behaviours

- **A culture of connection** - people care about others and invest the time to develop healthy relationships, reaching out to help others
- Preserving one's own time while fiercely protecting the family's time
- Curating a life – making moments more meaningful, including doing things with family
- **Mothers: are feeling complexed** – happy and secure that all family members are under her supervision, but more stressed, depressed due to more responsibilities, less free time



Work

Work should provide continuity, structure, earning and meaning

The pandemic has brought home the fragility of the 'job' market where **having a job does not ensure job security**

“

This pandemic has impact all sectors and industries, including my job. As a FnB company, we obliged to close all of our restaurant at mall. That means we have to discharge all the employees at store

I have no job now, work from home for me means no job, no income, no clarity on when can I get my job back

I got a 50% pay cut due to this pandemic and work from home policy

”



Many cannot go to work or do not have jobs and **feel anchorless**

“ *Since there's no field work, I have no additional income. I only received fixed income as I didn't get any transport fee during work from home time.*

Losing my income has brought my shame.

I have no job, no income and no savings. I don't know what to do. ”



Class divide exposed:

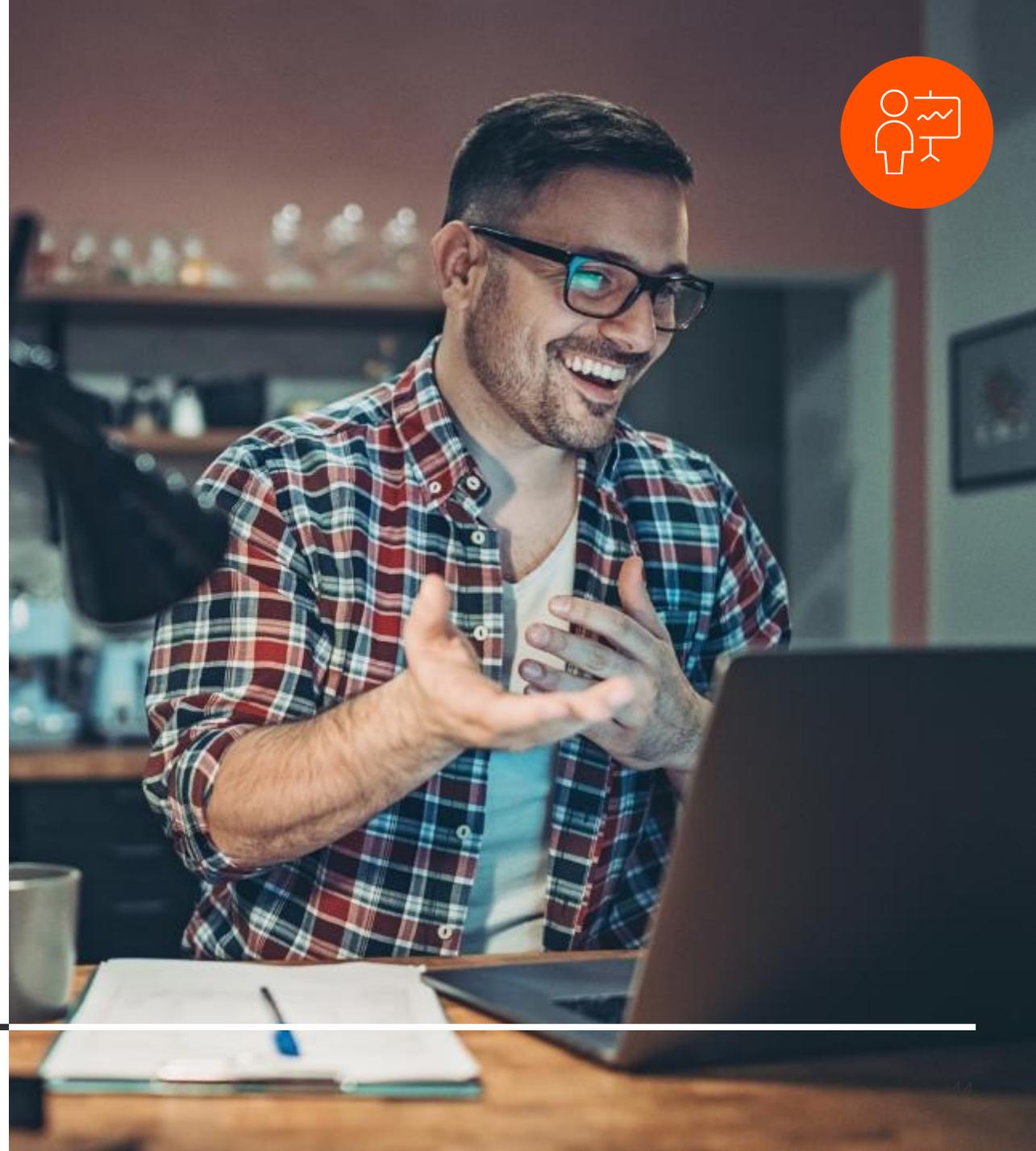
The privileged have the luxury of working from home: **flexibility, security, ease, time and money-saving** are some of the perks

“

Work from home somehow save me some money, there's no need to buy a new clothes, shoes, accessories, put on my make up, no commuting. I'm glad for that.

What I like about WFH life is the flexible time, no need to wake up in the morning or wearing a formal attire

”



But going to a **physical workplace is still important** for emotional stability and work-life balance

Assuming there were no longer any government restrictions, more than 50% of Indonesians are mostly ready to return to office

“

Yes, flexi hours means I can start work later but I am working much later into the night and that's not healthy.

I miss going out to office, the fixed hour of working from office give me a better work-life balance from home. It seem impossible back then, but we survive!

It's just simply hard to work from home. Having the kids at home who also doing school from home is consuming my time and energy, I find its hard to focus on my job.

”



Going to a workplace is as important for the worker as it is for the rest of the family – it's the only way to **coexist in a shared space**

26%

of Indonesians are very eager to start hanging out with friends

“

I know it sounds funny, but I'm dying to get back to my normal working habit. I miss going to office, I even miss the traffic.

What I like about work is the co-workers, we usually spend time together after office hours, just hanging out.

I kind of miss going to workplace, we could have lunch or a quick snack time with colleagues to rant about work.

”

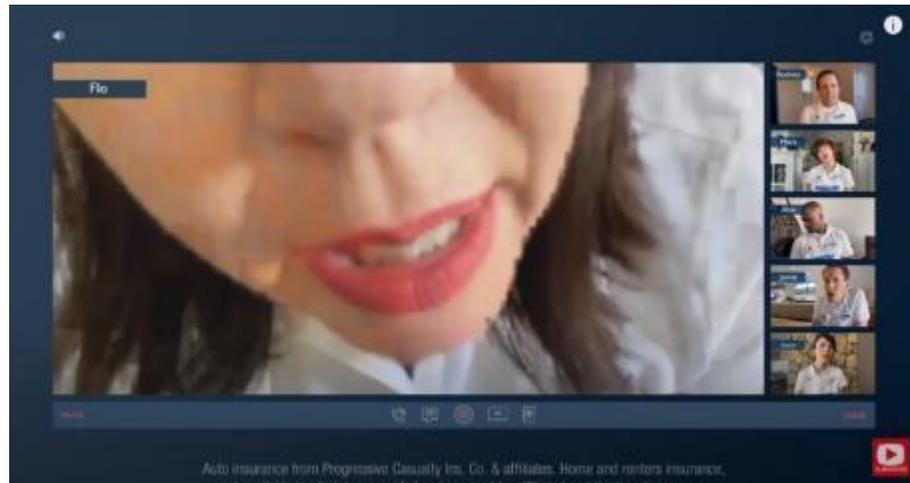


Showcasing 'me too' in facing WFH challenges, or how the brand can provide tangible support is another route to create resonance



Play with brand purpose

▶ Progressive – Tech Issues



Progressive comedically showed their own challenges of doing conference calls

▶ Apple – The whole working from home thing



A series which tells the story of how a team struggles with the challenges of working from home, and shows how **Apple** can help

People have turned inward as a way to reclaim some control

- In many places, people are **topping up income with micro-entrepreneurship**
- A focus on **developing new skills**
- In especially **risk averse** places, people are not keen to switch jobs until the economy settles
- Putting **plans in place to create a better life** – saving more, better work-life balance, and smart solutions to running a business



39%

Indonesians start thinking about to start a business as an impact of pandemic condition

“

Now I realize that I should not fully rely myself to one particular job, preparing from emergency fund and saving are a must. So if time like this happened, I'm fully prepared

”

For future, I would like to be an entrepreneur. That's why me and the family chose to open our own catering business now. So that we can cook together and also be financially dependent.

New skill or 'micro-entrepreneurship' context in ad's stories can help boost the brand's relevancy, particularly when it's connected with the brand role



Play with brand purpose

▶ [Grab - #TerusUsaha](#)



A montage of multiple small businesses that are either facing challenges or just starting to open due to the pandemic, and that **Grab** supports the digitalization of these business



Work behaviours that the pandemic has shaped

New behaviours

- **Decompression time** during work
- Create **new boundaries** between work and home (especially Singles)
- **Balance** between creative reflection and group interactions
- **More pressure** to demonstrate that you are working (Connected 24/7, Video calls)
- **Introspection** on the value of time, money, and connection



Money

Financial vulnerability sees shift from accumulation to prudence and protection

80%

Claimed coronavirus has already impacted household income

66%

Claimed go out of their way to find the best prices, even if that means going to different stores.

80%

feel This situation demands us to be even more proactive about financial planning

62%

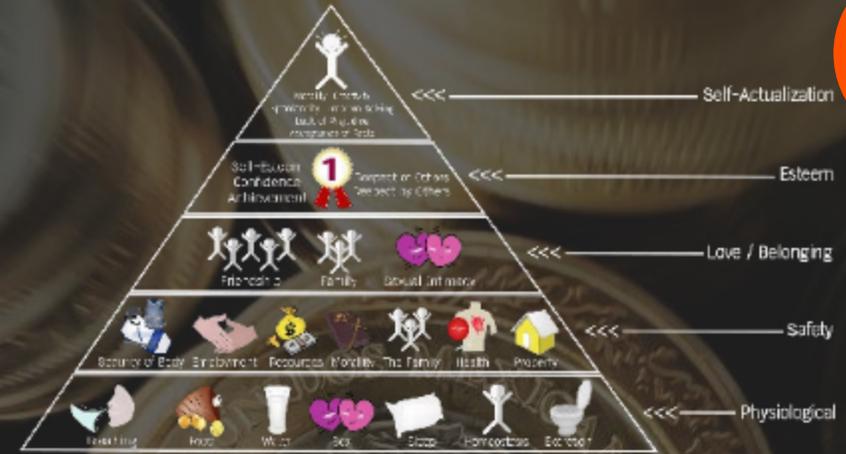
Claimed pay more attention to products on sale

80%

Claimed pay more attention to prices

The fear of loss, whether that be status or simply basic needs – evokes feelings of vulnerability at all levels of society

- **Protection versus Accumulation** - anxiety over money has led to increased protectiveness of money through self-sufficiency or government help
- The pandemic **disproportionately impacts different ages, life-stages and socio-economic status** – splitting the world into a now and future needs focus:
 - For daily wage workers the need is now
 - For white-collar employees the focus is on the future



56%

Claimed coronavirus made them less likely to make a big purchase



Of course I'm anxious (about current financial condition), cause I don't know until when this will happened (unpaid leave), and when can I get my job back.

Our priority expense now is anything for daily needs, food, personal care. Now hand sanitizer and mask is also important. We also buy vitamins to stay healthy.



Different sets of attitudes leading to behaviour can be seen



Savviness

Giving priority to basic needs rather than indulgence / premium needs

“

Now I focus only on the basic needs, foods, hygiene product, vitamins, and personal care are the priority.

”



Resourcefulness

Doing new things that can save more money e.g. cooking rather than buying food outside

“

I try to cook my own meal, its more hygienic and I can also save some money from buying food.

”



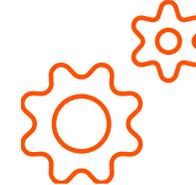
Less Mindfulness

Spared money is being used to buy things online as distraction from boredom and some being saved for future spending after pandemic is over

“

*The truth is I do online shopping a lot in this pandemic times, cause I have nothing else to do
I can't wait to go on vacation with my friends once this pandemic ends*

”



Practicality

Getting on with it; making sensible choices everyday that enable long-term saving / success

“

This crisis time make me realize that we need to prepare emergency fund and have a lot of saving, so we didn't have to worry if time like this happened again

”

Renegotiating value – it's about how you feel, not what you have

- Across all socio-economic levels, **people are moving away from hyper consumerism**; awareness toward saving is increasing
- Financial pressures (and physical product availability) have led to a **renegotiation of value**. e.g. Best deals are not always bulk buys
- New **interest in entrepreneurial endeavors** seek to provide financial security and peace of mind
- Some **seeking spiritual fulfillment now** for the first time as a substitute for consumption joy

“ *For future, I would like to be an entrepreneur, that's why me and the family chose to open our own catering now. So we can cook together and also be financially dependent*

COVID situation has taught us that saving is important. So we can secure the budget for situation like this (pay cut, unpaid leave).

”



47%

Will reduce spending to save money

Higher among 40+ year olds & in Jawa



52%

Worried about my Job/ Income

Higher among Men & 40+ year olds

Either through emotional or functional routes, brand can ride on this financial tension to establish stronger relevancy

Redefining product value

▶ Clear – Goceng (Rp. 5000)



Clear showing the value of the product as opposed to only communicating low price

Emotive support on Financial Pressures

▶ IM3 – Teruskan Perjuanganmu Untuk tetap merdeka



IM3 touches the emotional route and showcasing montage of how people are building entrepreneurial skills to create financial security



Money behaviours that the pandemic has shaped

New behaviours

- Indulgence has shifted to prudence
- Moderation and judiciousness on the rise
- Saving more, spending less - life goes-on without many excesses
- Reprioritization of essentials (personal care, skin care, quarantine cooking, healthcare / vitamins, hygiene / cleaning products)
- Personal financial planning – creating an emergency fund is now a leading, universal goal across ages and countries with new interest in various types of insurance products as well
- New sources of extra money – 2nd job by primary earner, new family members taking on jobs



Leadership

Every single one of us has the spark of leadership within us

Leadership

It is a survival instinct to search for and attach yourself to a strong leader in times of crisis

-
- 1 Ability to **resolve conflicts** and take everyone along
 - 2 Philanthropists: **helping** where the gaps are
 - 3 Medical and media: **informed** and balanced
 - 4 Media and celebrities: **morale boosting**
 - 5 **Including people** in the decisions, making **pragmatic decisions**
 - 6 But people can be **overwhelmed with lots of information** from the government and media, thus chose to step away from the information for some time

Leadership has come from traditional authority figures

Local and national politicians, media, medicine, religion, philanthropists



Najwa Shihab

Newscaster, Indonesia

Trusted and reputable



Mark Rutte

*Prime Minister,
Netherlands*

Modesty and pragmatism



Jacinda Ardern

*Prime Minister,
New Zealand*

Empathetic decisiveness



Li Ka-shing

*Business magnate,
Hong kong*

Money for good



Gladys Berejikian

*Premier,
New South Wales*

Looking out for her constituents

Leadership



People look for a person who has a good track record on giving the most actual and genuine information

“

I think the voices that I can trust in giving credible information is Mbak Nana, Najwa Shihab. She is a smart, wise, and always uncover actual facts, even before COVID,

”

Leadership

72% get very angry when seeing someone else not adhering to the latest government guidelines.

80% claimed to be very careful to adhere to all health and safety measures.

(e.g. social distancing and others, like hygiene)

58% think the government is doing all it can to reduce the crisis

Indonesians are more trusting of their government than many other countries

“

I could say that the trust for the government is 50:50, we can't never really know the truth. That why we also need to look for any information from different sources, not only from the government.

I think we all should have believe the government, because they have the responsibility and the authority. They should know all the facts and any situation in this country.

The government should also assure that the economic condition will get better, assure that people will still invest here. We also should improve the local and small business (UMKM), so we're economically ready in facing crisis.

”

Leadership

More Trusting than other countries

There are a lot of 'expert' arises from the influencers / KOL—but this also bring some frictions as some people didn't believe the voice influencers with no related background (in health, medical)



Leadership has also come from brands and corporations but brands are under scrutiny and even positive actions need to be framed carefully

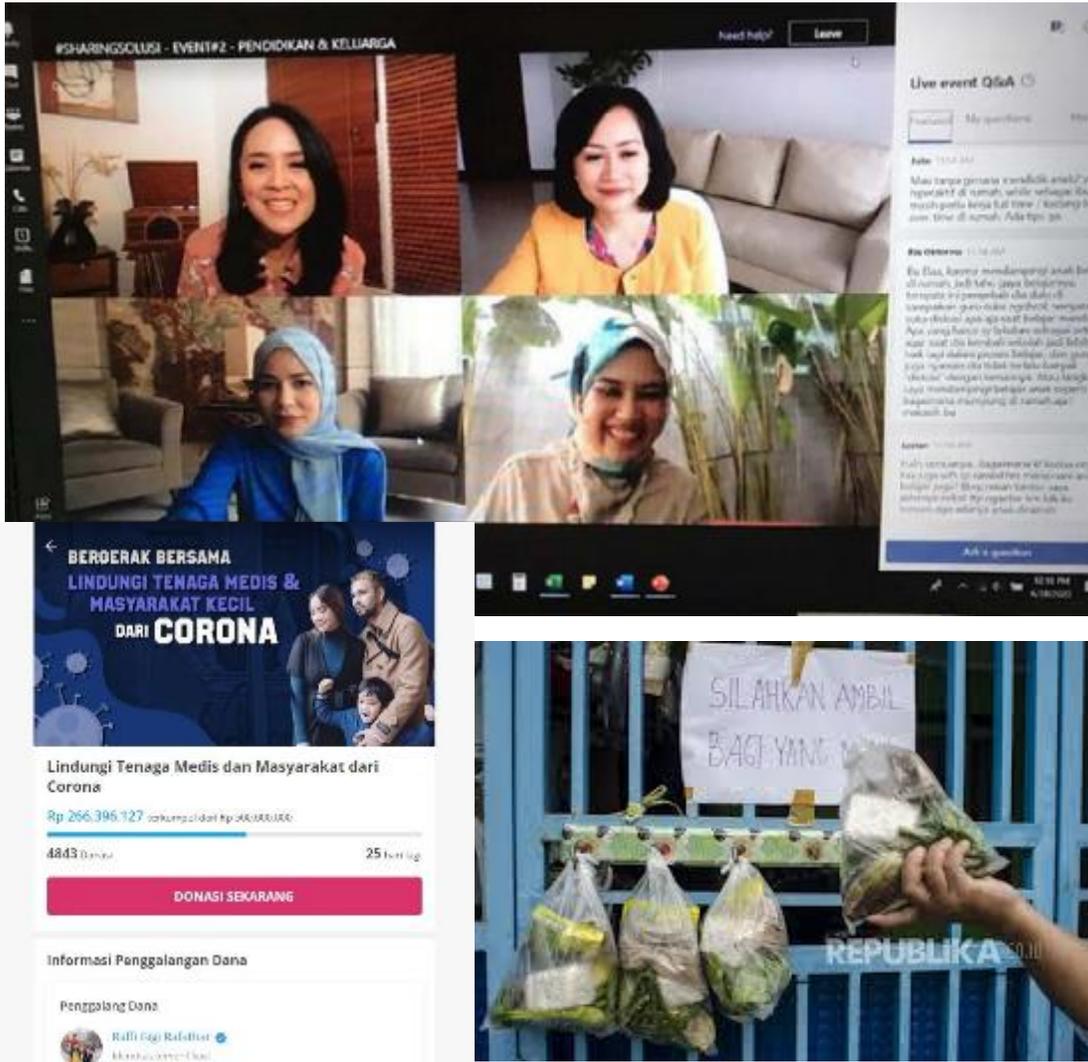
“

When it comes to COVID-19 updates and info, I will believe anything said by the expertise, it can be the health and medical expert, the researcher, or the scientist, as they're the one who have the knowledge

I watch a lot of influencers on social media talk about COVID-19, from wearing mask and updates on medical issues and workers. I appreciate their effort, but we need to check the facts as they didn't really have the expertise.

”

Leadership



Personal and community leadership on evidence in plenty

“

We have to rely on our self and the society, assure that we maintain our healthy and hygienic life. Protecting our inner circle and the society is a must; solidarity is the key to defeat this.

It amaze me how people are helping each other in this difficult times. Donation and voluntary activities make me realize that we can survive this as long as we have each other

My neighborhood did local lockdown when the cases is rising, so we didn't allowed outsider to come and enter the neighborhood. We didn't think that the government will enact lockdown, thus we decide the rules for our own neighborhood

”

Leadership

- 40%** Expect Brand to attach the crisis and demonstrate that it can be fought
- 61%** People like to see a lot more advertising about what brands are doing to help their employees during the coronavirus crisis
- 65%** People like to see a lot more advertising about how brands are there for you during the crisis
- 69%** People like to see a lot more Brands donating their advertising space to charities
- 72%** People like to see a lot more Advertising about what brands are doing to help the community during the crisis

Across the board there is an expectation that brands will do more

“

I appreciate when the brand adapt and innovate quickly during this crisis time. The brand should prioritize the health of the consumers. For brand in service industries, moving to digital is needed as it minimize the physical contact and interaction between consumers and the brand

Being inclusive is also important, as people are missing direct interaction with others, brand could provide a communication with warm and togetherness tonality.

I think I need some humor, to comfort me in difficult time like this. I would prefer a lively and fun brand who communicates high energy as I need some positivity in time like this.

At this time, the brands should be thoughtful, giving protection to the society as simple as encouraging people to do physical distancing and wearing mask or provide platform and doing campaign on donation

”



Leadership behaviours that the pandemic has shaped

New behaviours

- Personal leadership on the rise—at household (teaching kids), neighbourhood (mobilizing resources or information updates), or community level (volunteering, donating).
- Calling out self-serving, harmful or tone-deaf acts by public figures (including brands)
- Brands can determine leadership either by problem-solving, doing good or providing reliable and timely information.
- Participating in societal recovery can have an impact on economic recovery.



Health

My fate is in your hands

Health

Many of our (blind) beliefs in health have been soundly debunked

Existing beliefs

- 1 There is 'a' time to worry about health, such as age, lifestage, illness
- 2 Health is primarily about having a healthy body
- 3 My health is my business and I am in control
- 4 Being shielded from transmission
- 5 Genetic protection often trumps the need for preventive action

The realisation

- 1 The Eastern philosophy of body-mind duality finds more interest & acceptance
- 2 Holism (mind-body-wellbeing) as an approach rather than problem-solution
- 3 **Everyone** is vulnerable to the new-age diseases – class, money, age, caste are no barriers
- 4 Anyone can be a transmitter
- 5 Be aware of the dangers in the environment and shield against them

Health

Concept of hygiene is becoming nuanced and intense

The enemy can slip into the home

- With the pandemic, there are many ways in which the 'enemy' could breach the security of the home: domestic help, delivery, family member.
- This is a **turning point in changing age-old unhygienic behaviours.**
- Rigorous sanitizing after any contact with the outside world, pets, groceries and food.

88% Purchasing personal protection products such as masks & gloves

50% Increased of purchased – Fresh Meat / Chicken / Fish / Eggs

63% Increased of purchased – Fresh fruit and vegetables

66% Pay more attention to the origin of the products

“

Now I care more about hygiene, I regularly wash my hand or use hand sanitizer, and I always take a bath and change my clothes whenever I came back from outside

I'll be more careful on buying food, especially from street vendors. I prefer cooking and eat a home-made food. ”

Enhance the service to meet consumers' needs or simply reinvent the credential around health and hygiene can support the brand's relevance in the new normal

Continue delivering assurance of safety & security

Grab Luncurkan Layanan Kendaraan Khusus Lawan Penyebaran COVID-19

Reyhan Diandri Chivrianto - detikinet

Setasa, 27 Apr 2020 14:56 WIB

0 komentar

SHARE



Grab launched new car feature to provide extra protection and driving safety



Pond's - Cuci Tanganmu Cuci Mukamu



Pond's reminds people that germs can quickly spread by touching your face, highlighting the importance of face washing as well



Aqua - Tidak Semua Air Sama



Aqua reinventing its credential on purity, utilizing Raisa as celebrity to create relevant in-home context



Health behaviours that the pandemic has shaped

New behaviours

- New pro-active approach to improving one's health / immunity and vitality
- Taking vitamins to boost immunity
- New routines around handwashing, disinfecting / home cleaning and mask wearing
- More cooking at home with a concentration on local, fresh ingredients



Entertainment

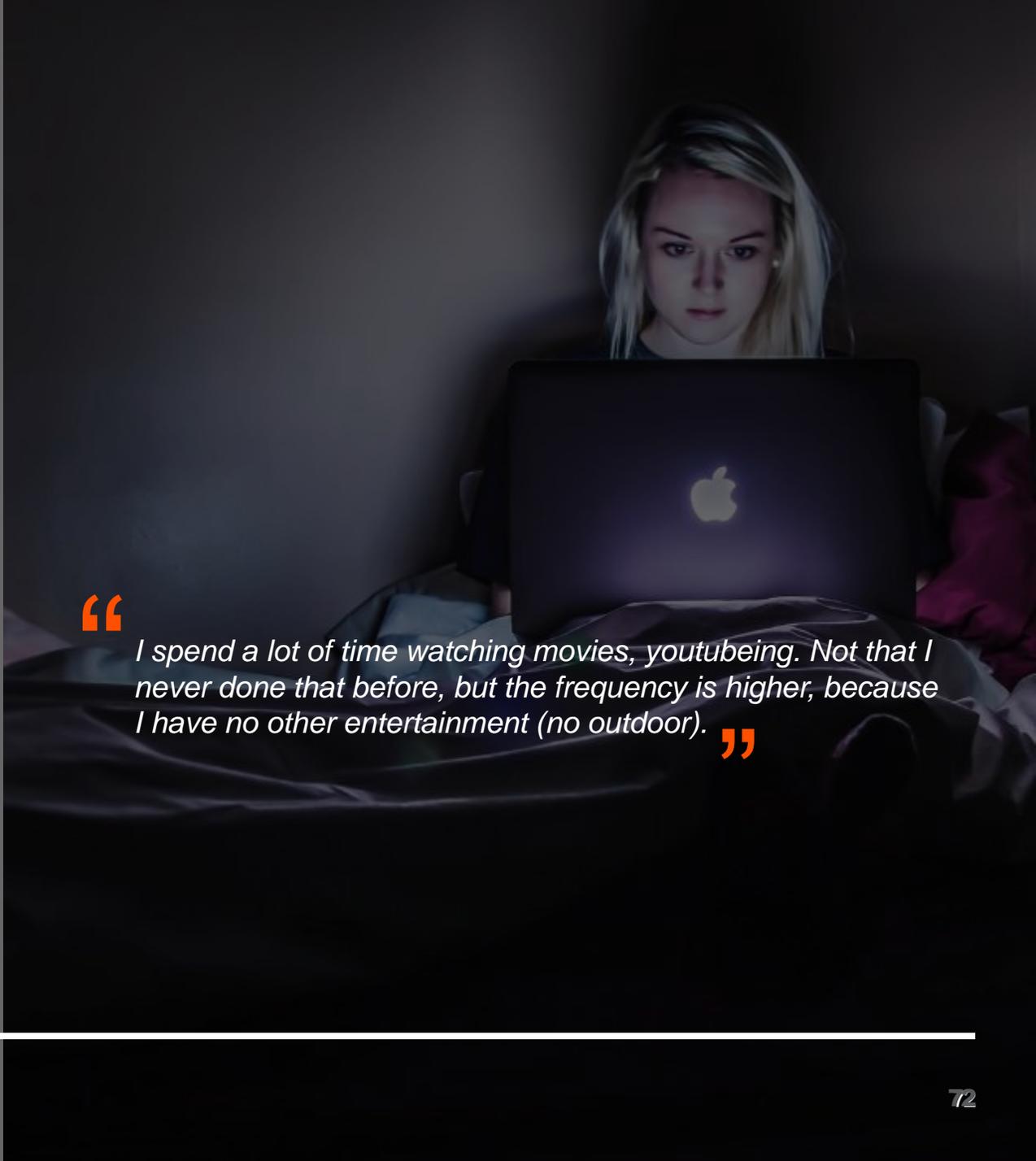
A time for mindful creation, action, and consumption

Entertainment

Is now about filling space

Reactive: Life is on pause

- Passive consumption of other people's creativity – short-form videos
- Watching TV and digital access (gaming, social med, vlogging) for entertainment is increasing
- But, virtual world make people get bored faster, thus direct interaction and other 'offline' activities is still needed to keep people sane
- Moving the real experience to the virtual world as a like-to-like replacement: virtual birthdays, online quizzes
- Multi-generational rather than cohort-specific hangouts: more family time
- Going back to old and new pleasures – gardening, DIY projects, craft, cooking



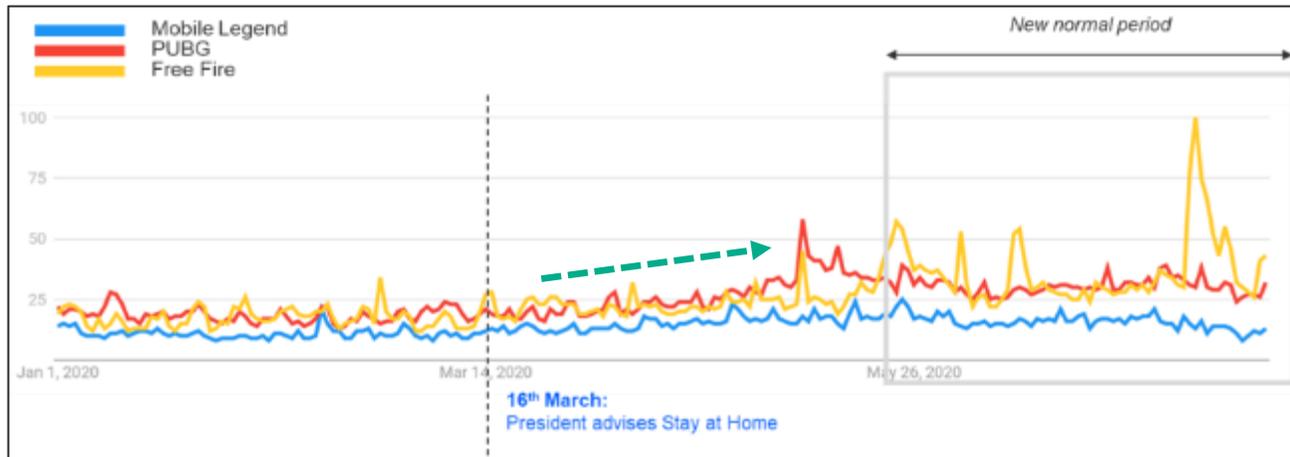
“

I spend a lot of time watching movies, youtubeing. Not that I never done that before, but the frequency is higher, because I have no other entertainment (no outdoor).

”

Pringles showcasing how the brand evolve and forge new partnership, tapping into emerging need while staying true to its brand purpose

Play with brand's purpose



Interest in mobile gaming increased since PSBB and is maintained even after restrictions are relaxed

Pringles – X box game pass



Built around the purpose of making situations fun and enjoyable, Pringles tapped into gaming hype by offering free Xbox game passes and other in-game accessories

Entertainment

Is also about (self) discovery, connection, creation



Creative: Changing tracks

- Reconnecting with oneself and others through a shared, **meaningful pursuit**
- A sense of movement and progress: learning a language, playing an instrument, art
- **Self-improvement** rather than pure hedonic pursuits
- **Creation as a coping mechanism** as well as way to communicate and connect with the outside world

COVID-19: New business ideas emerge as people work from home

Nita A. Lomasata
The Jakarta Post

Jakarta / Sat, Apr 18, 2020 / 08:39am



For some people, a surfeit of leisure time at home has ignited ideas about new hobbies that can be transformed into financial income

“ *Now that I can't run, I did home workout routine and join some virtual class with my friends, as a way to cope up with sadness as we cancel all our running event*

Now, we are experimenting with cooking. We even open our new business earlier, we open food catering just a couple of week ago. We think in this crisis we need to open new opportunity. ”

New lifestyle has influenced the way people think about themselves, finding out the true identity and new perspective of life, which providing new themes for brands to tap into

Self discovery of true identity and meaning

▶ Clear – Come back stronger



Clear portrays the sense of **'better me'** and express stronger personality

▶ Apple – Creativity Goes On



Apple encouraging people to stay creative and living up new hobbies & opportunities

Entertainment

A holiday is an escape from the shackles of everyday life

People are pausing, saving, searching for safe experiences post the crisis

- People are resistant to International travel immediately, due to safety concerns
- Protecting the investment in travel, the face of unpredictable developments is another concern
- Opens up an opportunity for recreating an experience package that is accessible locally – needs for travel is only postponed not erased

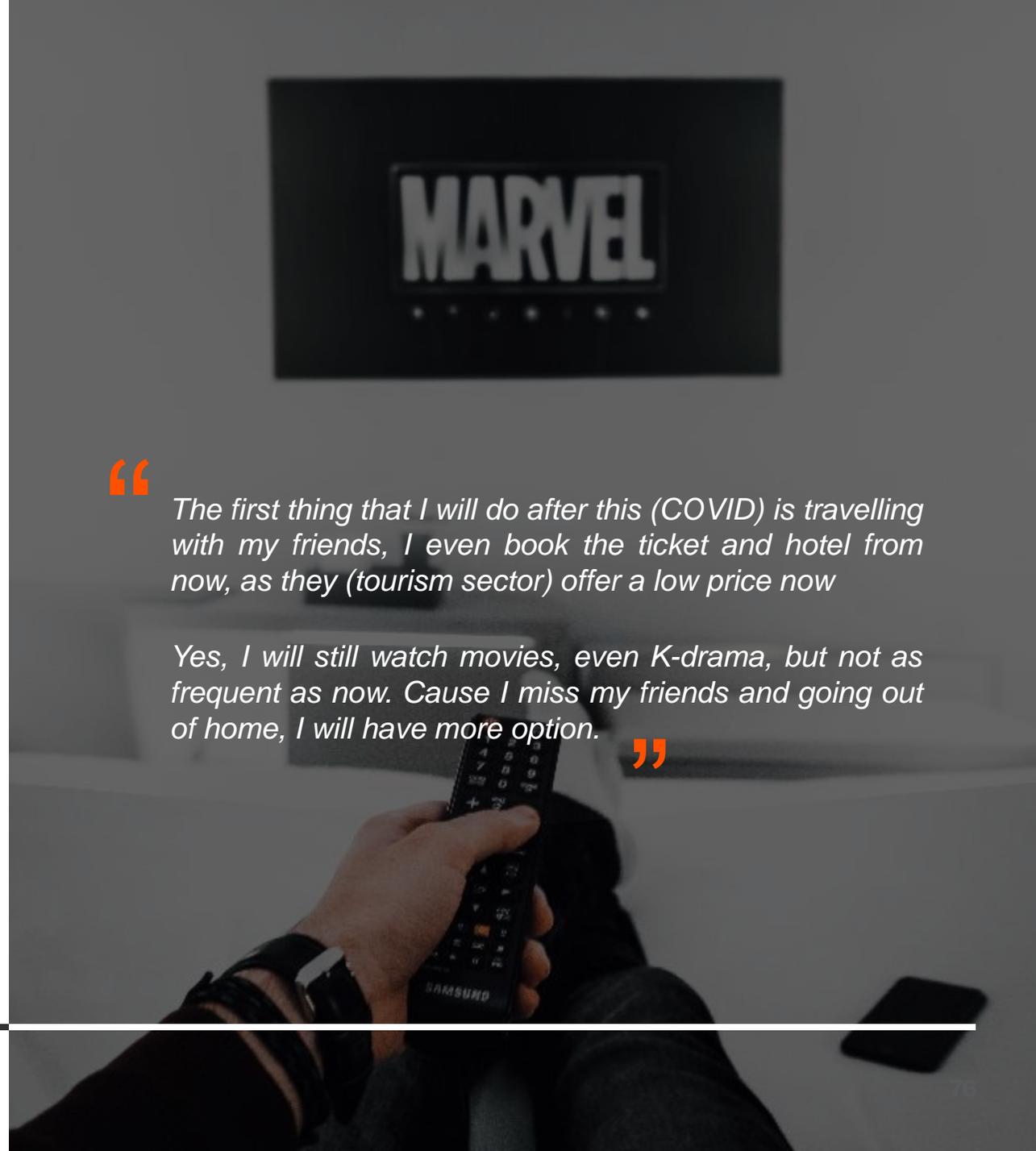


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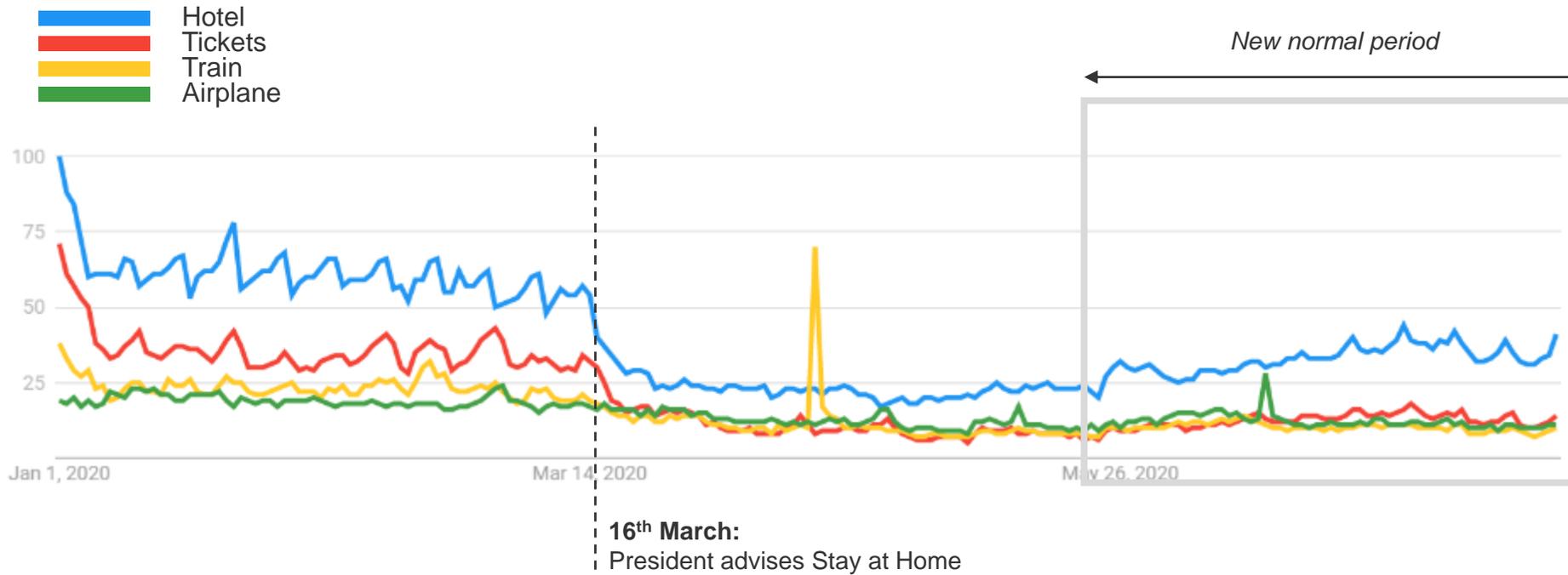
The first thing that I will do after this (COVID) is travelling with my friends, I even book the ticket and hotel from now, as they (tourism sector) offer a low price now

Yes, I will still watch movies, even K-drama, but not as frequent as now. Cause I miss my friends and going out of home, I will have more option.

”



Interest in travel are gradually recovering, but people are still unlikely to travel long-distance. Staycation is a safer option to for an escape from the distress

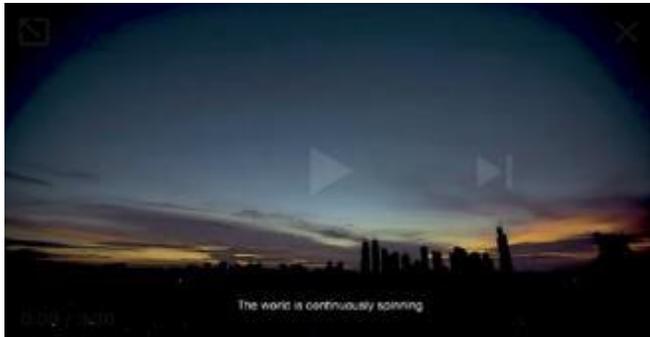


Search for tickets and other forms of transportation are not growing, indicating that people are still concerned about their safety and prefers to have a short break somewhere close

It's important for the leisure brands to enhance the sense of 'safe experience' while at the same time filling the need gap

Provide safer experience of entertainment

▶ [Santika – New Normal](#)



Big hotel brands starting to showcase on how they can ensure safety and security to all their customers by providing safety kits and following the health protocol

▶ [Mulia Bali – New Normal](#)



Provide flexibility to cater the needs

▶ [Tiket.com – Tiket Flexi](#)



People can buy a voucher which can be exchanged any time they decide to travel within a year



Entertainment behaviours that the pandemic has shaped

New behaviours

- Revisiting old favourites e.g. movies, series, books (reruns)
- Online connections and experience of new activities (singing, dancing, meditation, crafts) via Zoom]
- Multi Player Online Gaming involving conversations and connection
- Rediscovering old creative pursuits (craft, baking, gardening) and developing new ones (Instagrammable, joining virtual classes)
- Planning for a holiday once the pandemic is over.



How brands can understand needs

Creative themes to maintain relevancy to the situation

Re-defined Intimacy



It would be wise for brands to show how the variety of new ways people can maintain their relationships.

Stronger Sense of Interdependencies



Brands need to showcase a truly 'connected and kind' world while infusing its role in the story.

Self-Discovery of Identity and Meaning



Brands should inspire people on how the crisis can be viewed as an opportunity to upgrade themselves, and showcasing more appreciation to others

Play with brand's purpose



Brands will create more impact by showcasing the tangible help for consumers to adapt with the new tensions and behaviours

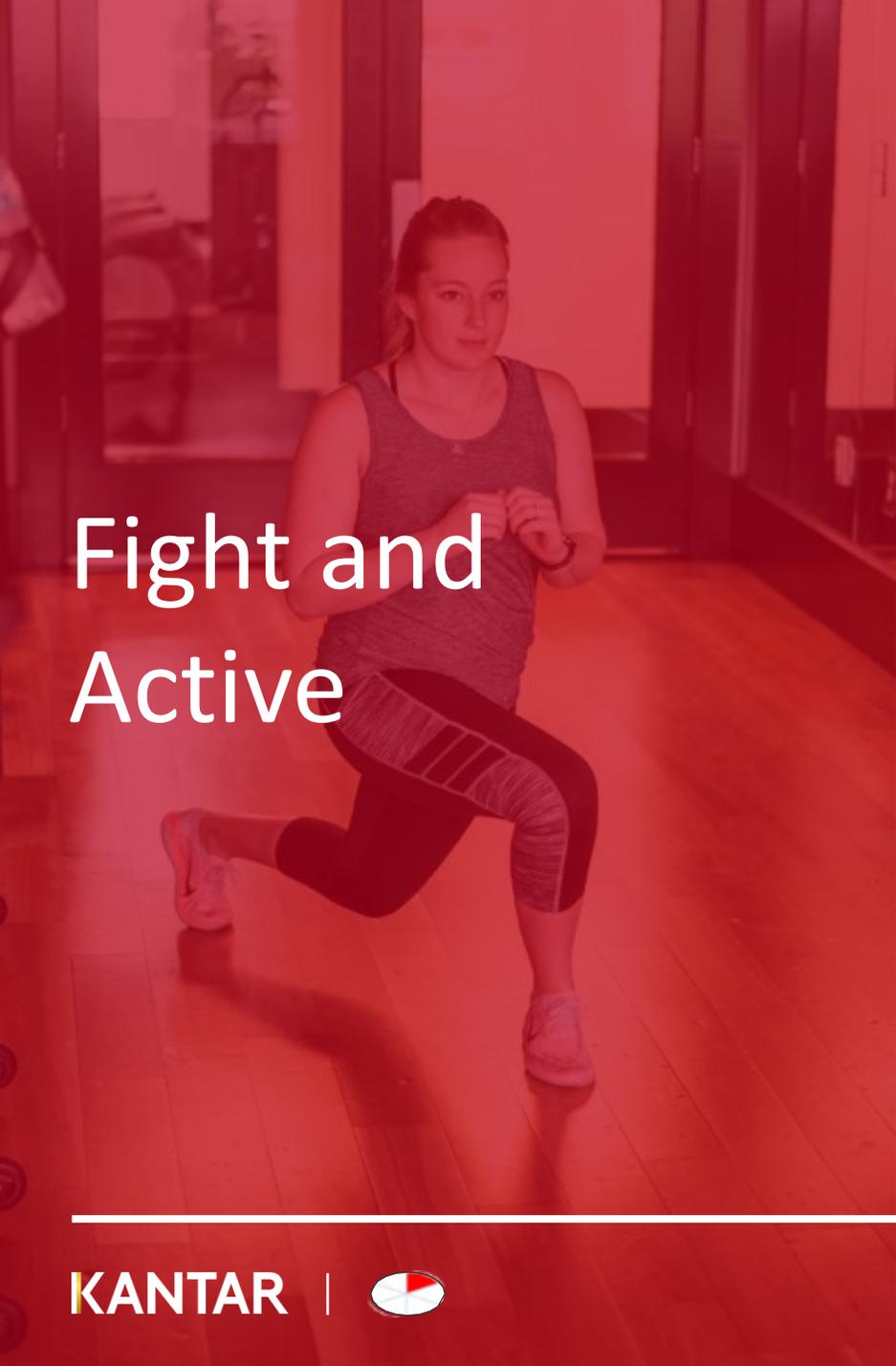
Assurance of Safety and Security



Brands could do well by showing how they can provide safety for their consumers, even if it's as simple as reminding them.

Creating brand role through Need lens





Fight and Active

Energetic and **raring to go**, life in PSBB is about keeping **busy**, staying **active**, and **challenging** myself to learn new skills. It's also a good time to **charge up** one's immunity for the future...

I believe we can **fight** this!

“

I'm looking forward to getting back to the gym and working out with others. It's more motivating than trying to replicate it at home.”



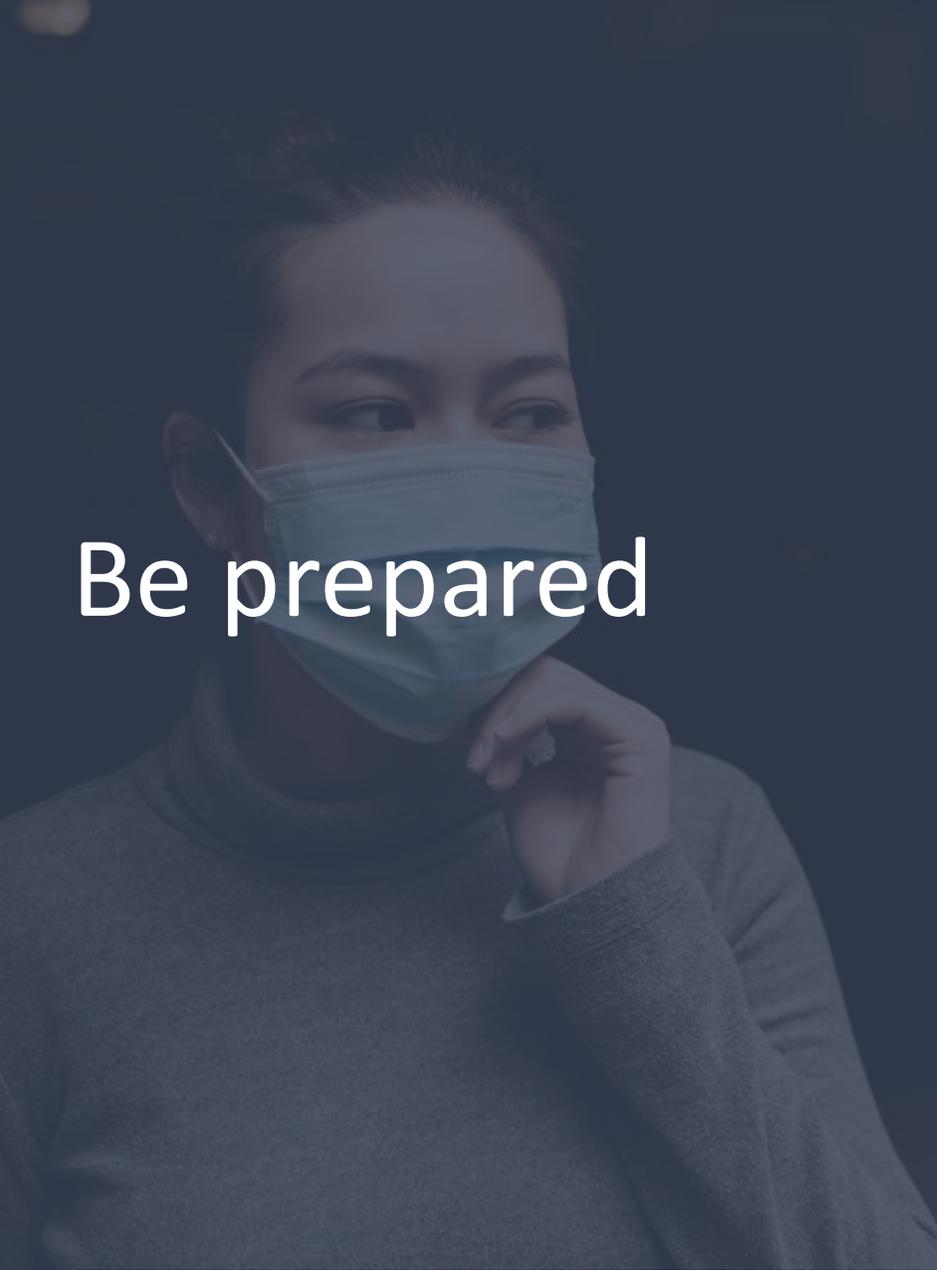
Be
empowered
in PSBB

Driven to use this time to better myself. I am **determined** to make sure I remain at the **top of my game**.

With the motivation to persist, I adapt by establishing an approach to **succeed and empower others**.

“

You have a choice on how to react. I, for one, choose to make the best of it.”



Be prepared

Organised and **regimented** throughout PSBB, using this time efficiently to **prepare** for the long-term. Developing useful skills and deepening my **knowledge**, I am **composed** in my focus on taking correct measures.

“

This situation shows us that we should be smarter and more responsible in our lives. We shouldn't expect that somebody will help us. Planning is a key tool to help us to adapt for the future.”



Be reassured

Grateful for time spent in lockdown **caring** for loved ones and **keeping safe**. This is a moment that I will look inwards to find **peace and solace**.

I gather my sense of **reassurance** by helping those I value most and embracing life's **simple** treasures.

“

Besides all the bad things, I'm feeling grateful that I and my family are healthy and able to spend time together, quarantining together.”



Be collaborative

Unified in effort, I am part of my community **working together**, though apart. **Practical** about the reality, I create **friendly** connections and spend **quality time** with others virtually.

“

I think it's proven to all of us that it's actually pretty easy to find the time and to reach out to people that don't live near you, people that you go...boy, I haven't talked to that person in years.”



Be optimistic

Fizzing with desire to **have fun** outdoors dreaming of **freedom**. I focus on the **bright side** and keeping myself distracted. It can be my own **adventure** with online **parties** and social media challenges, nothing can get me down!



Even if we're facing hard times with COVID, we still need to create fun and happy activities to have a better day.

Some parting thoughts...

- 01 There is nothing permanent about new normal, we need to continuously monitor and question
- 02 Our approach to pandemic is deep rooted in our unique socio-cultural aspects (Hofstede), which provides some solidity to our assumptions about consumer behaviour
- 03 Question the role our brand would play and the tone it would take (ofcourse in line with the brand purpose)
- 04 Think which 'Indonesia' you would be talking to (Think C19 Tribes)



KANTAR

Thank You



July 2020