ASPIRING GLOBAL, YET STAYING TRUE TO STRONG CULTURAL FOUNDATIONS

UNDERSTANDING GENERATION Z INDONESIA

Dawn Herdman • Vikas Srivastava

INTRODUCTION

Indonesia, with the fourth most populous country in the world, a pluralist society with a burgeoning youth population, has an expanding 'generation Z'. These tweens and teens have grown up in changing times – the post reformasi era (post 1998 reformation), as well as the ever increasing influence of digital, social and other media. Yet Indonesia remains a largely conservative and traditional society.

We intend to review three sometimes competing forces on the female Indonesian teen: her development and biological stage; the cultural and religious influences of Indonesia and the influence of globalisation and media.

1.   Inner factors – developmental and biological developments in tweens and teens

Teens across the world go through a myriad of similar physical, psychological and emotional developments as they transition from childhood to adulthood.

According to Erik Erikson's (1950) theory of psychosocial development the teen stage from 12-18 years is classified as the 'identity vs. confusion' stage, when the adolescent is developing their identity; exploring independence and developing their sense of self. During this process, teens can become confused and insecure about themselves; unsure how they fit into society. In their process of establishing self-identity, teens may struggle for independence; and experiment with different activities, behaviours and roles.

Alongside this backdrop, the hormonal surge that occurs in girls around puberty can also cause intense emotional changes (Hellesvig-Gaskell, 2014). This, along with the onset of menstruation, can include irritability, mood swings, trouble sleeping and acne. Her confidence levels may vary and her need for close friendship and fear of conflict in this friendship or any form of rejection can escalate.

When studying the extensive literature around female development (Papali, Olds, Feldman, 2007), we see similar patterns emerging across the developmental years, as shown in figure 1. The tween years are identified by the onset of hormonal fluctuations and the beginning key need to fit in with the peer group; to the need to connect, grow and belong in mid-teens; to more explicit independence in later teen years. (See figure 1.)

Over time, as the teen reaches maturity, her identity has been firmly established and teens move from closeness and identification with parents and close friends to an independent life, firm friendships; and romantic relationships (by end of teen years).

The quest for identity is really the undercurrent running through all teen stages, and is developed and influenced by many factors - friends and connections, physical self, family, background, ethnicity, academic/school factors, religion and romantic interactions.

According to Newman (2010) teens are emotionally fragile as they try to establish their own psychological identities. One way of helping teens on this quest is through friendships, whereby establishing identity as part of the group can boost self-esteem and decrease insecurities to boost one's own ego. Newman also claims that teens need external validation and are quite narcissistic on their path to develop healthy self-esteem.

FIGURE 1. KEY DEVELOPMENTAL STAGES AND NEEDS FOR THE TEEN GIRLS
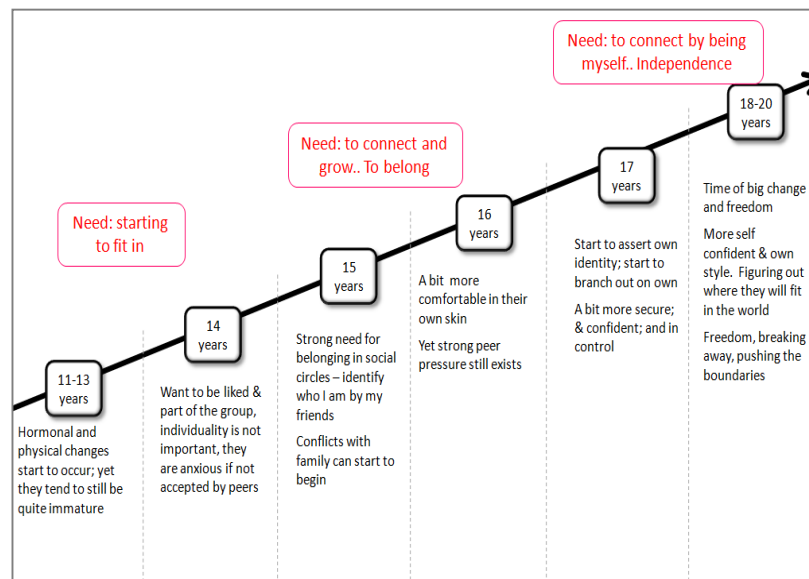
However, any individual teen may progress faster or slower through these stages, due to personality & environment.

2. Cultural and religious influences

Indonesia remains largely a traditional society, with a highly collectivist culture and strong importance of tradition and religion. Institutes, such as the Hofstede Centre, that study cultural indicators of countries across the world find that Indonesia has comparatively very low scores on individualism (but, rather, are highly collectivist); and high scores on power distance and harmonisation. These factors, as well as religion, have a huge impact on teens.

Collectivism: While a core defining tenet of most Asian cultures, Indonesia is one of the most highly collectivist cultures in the world; where the focus is firmly on the community and the family as the core social unit. This clearly defined social framework ensures that individuals have a defined role for the greater good of the group and within the group they give assistance and share burdens. Hence, they are also expected to conform to the groups in which they belong; and remain highly sociable overall.

A recent study by Primasari & Yuniarti (2012) confirms that for Indonesian teens, relationships with others (family, friends) are the biggest determiner of happiness. In fact, we will see that the family relationships (especially that of parent-child) are very central for Indonesian teens, and rebelling against this or disrespect for this is rarely seen. In fact we will see that aspirations for Indonesian teens include a strong desire to make their parents happy or help the parents out.

Power distance: Under the Hofstede measurement, Indonesia has one of the highest power distances, sometimes referred to as '*bapakisme*'. There is a high dependence on hierarchy; whereby people in power are followed almost without question.

Additionally, filial piety and respect for elders is paramount. Especially for young Indonesians, treating older family members with respect is vital (Forshee, 2006). We will see that parental influence is very strong and any sort of rebellion against parents is difficult.

Harmonisation, uncertainty avoidance and saving face are other important cultural values of Indonesians, who value maintaining the appearance of harmony at all costs. Being accepted socially and fitting in is highly valued. According to Hofstede, this means there is a preference for separation of internal and external self; where any negative emotions (which may cause loss of harmonisation and loss of face) are not outwardly displayed. Additionally, direct methods of conflict resolution are discouraged and may even seem threatening. Forshee (2006) claims that Indonesians strive for peaceful social order and balance and so people rarely openly disagree; emotional restraint is encouraged. We will see this impact on teens and how social media plays a role in opening up communications for Indonesian teens.

Indonesia is a patriarchal society whereby the man remains the head of household and is expected to be the provider. While women have greater opportunities now in terms of education and employment, these patriarchal foundations still dominate, even for the most liberal and globalised Indonesians.

Religion: Faith and religion is a key focus for most Indonesians and is even observed in the *Pancasila* (the philosophical foundation of the Indonesian state) whereby belief in God is one of the five core principles. Hence religion forms an important part of society and Indonesians tend to have a spiritual focus; living their lives by the tenets of their religion. Being a predominately Muslim country, we see that Islamic values are particularly entrenched in the culture, and as we will see, have been growing in importance in recent years. The core elements of Islam run through the culture, in that there is an expectation for one to show themselves and behave as a good Muslim - behave and act appropriately and modestly (display inner beauty), show restraint and continue to live by Islamic values and teachings.

However, according to many (e.g. Miftah, 2010), there has been a recent hybridization of local, global and religious beliefs and expressions within Indonesia. We will see examples of this within generation Z whereby they have been able to merge modernity with Islamic values.

3. Influence of globalisation and media

The post-Reformasi era (fall of Suharto in 1998) has seen an explosion in the media influence on Indonesian society. Budiman (2004) attributes this to a redevelopment and increase in mass media and modern communication technologies. Post Reformasi there was an opening up of media channels (including more private TV stations and more advertising) and publications that have exposed Indonesians to influences outside of Indonesia.   At the same time, there is the widely known and reported high internet usage amongst Indonesian teens; with a recent UNICEF report from February 2014 claiming that 30 million Indonesian teens are now online; with most on social media.   Hence, due to these developments, there has been a socio-cultural transformation with an influx of global popular culture; particularly from the West, but also other Asian countries such as Japan and Korea.

Western culture has infiltrated the press media, television and cinema.   Handajani (2005; 2010) claims that Indonesian teen print media tends to take on a western representation of how models look and dress (often tight or revealing dress), but then content still portrays a sweet, good girl image more symbolic of Indonesian traditional culture. Budiman (2004) claims that via TV advertising and programming, viewers are exposed to cultural patterns, morals and ethics of western societies.

Japanese culture became popular in Indonesia, since the early 2000s (Setiowati, 2013) via animated films, pop music and food (Surajaya, 2010). But Korean popular culture (K-pop) has been even more influential. According to Jun (2011), Indonesia was identified, at least at the time, as having the fastest growing K-pop culture in the world. K-pop had taken hold via TV soap operas and also popular music; but the explosion of social media use in Indonesia has been, by far, the greatest influence in spreading the popularity (Surajaya, 2010).   In fact, Jun continues to go on to describe how in 2010 Indonesian teens caused a spike in trending topics on Twitter for the band Super Junior (at a time when other critical news stories were dominating in traditional media).

As almost a backlash to this fairly rapid explosion of external pop cultures, there has been a push from Islamic sectors who claim this transculturalism has caused people to abandon tradition and religion (Hariyadi, 2010). With what largely began in the print media, Islamic pop culture has now expanded to television, music, fashion, etc. In print media, examples are given of celebrating the 'reformed Muslim woman' (a female who was heading down the wrong track and now has found her way back to Islam). He also claims that this Islamic resurgence has been stirred on by commercialism and that Islam has become part of the consumer culture, and in this, the emergence of certain Islamic symbols that can become part of one's identity. Some (Nef Saluz, 2010; Hasan, 2009) claim the hybridisation of Islamic and popular cultures whereby religion can be associated with commercial products (from shampoo to motorbikes to the trendy hijab) to having fun (festival feel for breaking fast time during Ramadan). We will see examples of this within this case study.

Some scholars (Nef Saluz, 2010) claim that youth are actively creating their own identity – taking elements from different traditions; local, global and religious influences.

THIS STUDY

This paper will look at how Generation Z manages to negotiate these various tensions and how it impacts their development and friendships; as well as their short and long term aspirations. We will be looking to identify how today's teens manage to balance these tensions; how they find creative outlets and ways to express themselves. We will also look to identify the shifts and changes for generation Z; the key drivers and implications of these.

Within the main case study to be described, the core objective of the research was to provide a depth of insight and understanding of the key teen segments in order to provide strategic directions to move a teen brand forwards in Indonesia and to help refine communication directions. Aside from understanding the core teen psyche, of particular importance was the area of friendships and how these help the teen to navigate challenges.

METHODOLOGY
Given these key objectives, and in order to understand generation Z in depth, a multi-methodological approach was needed to ensure the depth and level of insight into the target market.

Main case study
Target and sample: Fourteen girls aged 11-19 years (and each of their friendship groups) were included in the study. They were AB social class, living in Jakarta; and defined as 'alpha teens' – open minded, extroverted, opinionated teens (not 'fly on the wall' types). The following four stages of research were conducted in 2012:

1. *Self-directed ethnography* – Firstly, girls were asked to make a series of short videos where they could showcase their daily life and also their friendships and what's important to them. They were encouraged to be as creative and expressive as possible. The teens were also required to fill in a diary for a period of 7-10 days. Additionally for one of those days, we asked the teen not to contact any of her friends and to fill in how she felt throughout the day during this 'deprivation'.

2. *Traditional ethnography* – Traditional ethnography was conducted in which the 14 teens and each of their peer groups were observed throughout their daily activities for much of the whole day; across weekends and weekdays; at home, at school, extracurricular activities and during hang-outs. At school, we spent time in the classroom, the canteen and playground; and observed the interactions amongst friendship groups and the larger school community. At home, we aimed to understand the teen's family interactions and sought to gain further insight from viewing her own personal space within the home, via capturing the teen's most beloved and memorable items in that room. For hang-outs, we accompanied teens and her friends to cafes, restaurants, shopping, karaoke, 7-11 (popular as teen hang out venue in Indonesia); as well as in-home hangouts.

3. *Teen chat* – In addition to this traditional ethnography, we interviewed the main teen on her own and then her best friend on her own; and finally a mini-focus group with the whole close friendship group. For this study, it was of the utmost importance to find ways to access teen's inner most feelings, emotions and reach to the subconscious level. Therefore, many techniques were employed to try to get teens to open up and express themselves – including collage, friends' orbit map, psycho drawing, abstract picture sorts, guided visualisation, use of emoticons to express feelings and even asking the girls to design a recruitment advertisement for a replacement best friend.

4. *Social media ethnography* – With the ever growing importance of social media in the teen's life, we also sought to understand her on-line interactions and personality. For this, we were able to gain access to the main teen and her friendship groups' Facebook and twitter accounts. By doing so, we were able to analyse the pattern of friendship and sharing among peer groups and best friends. We tracked all their social media, and what media they use most often for the "friendship" moments.

For this analysis we focussed mainly on Twitter and Facebook; but also investigated Instagram and Path where applicable. The approach was two pronged. On the one hand we used social media analytics and tracking tools including Mediawave to give a macro picture across all our teens and their friendships; analysing Twitter network mapping (via friendship groups and key content/words); analysing the number of mentions and replies amongst the friends; frequency of tweeting, key word analysis / term analysis, etc. But on the other hand, we also conducted extensive social media listening for our key girls and their friendship groups across a period of 10 days during the time of the research. Here we were able to experience and analyse their real life interactions on social media.

A further stage of research, outside of the core teen approach, was also conducted: *interviews with key teen trendsetters and influencers*. These interviews aimed to understand teens more deeply, their friendship patterns, sources of influence and also the current teen trends. The respondents included a fashion blogger, a dance choreographer, a teen radio announcer, a magazine fashion writer / stylist, lead vocal for a local band and a female surfer.

For this case study, we worked closely alongside international consultants at Vivid Research Ltd, who drew on their knowledge and understanding of teens and youth from various markets.

Other studies that will be drawn on to understand the teen
Several other sources will be drawn upon for this paper, with the aim to understand the Indonesian teen in the broader context and identify shifts across generations.

- Expert interviews have been conducted with many KOLs in the area of teens and youth. These include youth consultants, the senior editor of teen magazines, journalists, and social media activists. These interviews focussed largely on understanding shifts across the generations and discussing the emergence of a generation of 'New Indonesians'.
- Ongoing studies with teens, within the brand and product context draws as inspiration
- Ongoing studies and work with the older generation of young women - young mums, including several large scale ethnographical studies
- Extensive desk research and market review for examples of how teens express themselves and their creativity

FINDINGS

Many of the key challenges for teens are similar across the world - striving for independence from parents, finding who they really are and battling the usual self-image and confidence issues, as well as hormonal fluctuations. Yet, we see specific nuances in the Indonesian context, given the highly collectivist culture, the importance of family, the societal need for harmonisation and the strong Muslim influences. But according to experts and trendsetters, and observed amongst our teens, the Indonesian teen is very positive and optimistic.

"Youth now generally have positive & confident outlook in life, such as feeling that future is bright. Highly positive. They are very updated, confident, all the things are possible." (Expert)

Overall, when considering the well described stages of teen development around the world, we see that Indonesian teens seem to develop emotionally at a slightly slower pace, with a slight lag, when compared their Western counterparts. In some essence, there seems to be a certain level of innocence longer for Indonesian teens. For example, at 15 years old, some of our teens love nothing more than sleepovers and ghost stories!

Section 1: Understanding teen life and friendships

As for any teen, Indonesian teen daily life is hectic, a balancing act of school commitments and after school extracurricular activities. Teens tend to hang out together after school hours as often as they can, either at each other's houses or at the café / shopping mall, minimart or doing sports. When not together, teens are often in contact via BBM, Twitter, WhatsApp and other social media and instant messaging applications. Their most special or aspirational moments together often revolve around out of town travel; or at least sleepovers; allowing teen girls to have more emotional bonding with the friends and result in long lasting memories.

Use of social media: Indonesian teens are very active across a number of media and applications. Twitter, Path, Instagram dominate social media and instant messaging of BBM, WhatsApp, etc. are also commonly used. We will focus on Twitter and Facebook.

- Twitter is used by all girls, with some tweeting many times a day.   Teens use Twitter to express what they feel at any particular moment as an emotional release (e.g. if feeling '*galau*' or disappointed).   Twitter is also used for chats between friends or to arrange gatherings, especially if instant messaging is not available. Twitter is a way of sharing information, inspiration and or even spiritual thoughts with many retweeting of sites like @sayingsforgirls.   Finally, Twitter can also be a way of self-identification either via sharing romantic status, hang out venues or activities (or photos).

- On the other hand, for many, Facebook is more of a long term communication tool, less instant (and decreasing importance for Indonesian teens). Hence it often becomes a way of sharing photos (along with Instagram) and a way of making a statement about themselves (via their photos or profiles). Teens often have very many photos of themselves and their friends hanging out, posing and these are uploaded and shared. This is a way to outwardly show their togetherness and identify as a group, as well as a way to get attention from others.   Facebook can also serve as a way to make an identity for herself or portray herself in the way she desires to be seen. For example, we see teens who claim to be in college in the USA or working (e.g. entertainer). Some others will use it as a way to show off their life, e.g. showing photos of a holiday with their boyfriend. The profile information can further lend itself as a statement about their friendships with many identifying their closest friends as family or 'sister'.   Some girls will update based on their emotions and feelings, but more on long term status like being heartbroken due to a break up or their religious feelings. Finally, a couple of our teens are using even Facebook as a tool for online sales of fashion. (See figures 2 and 3.)
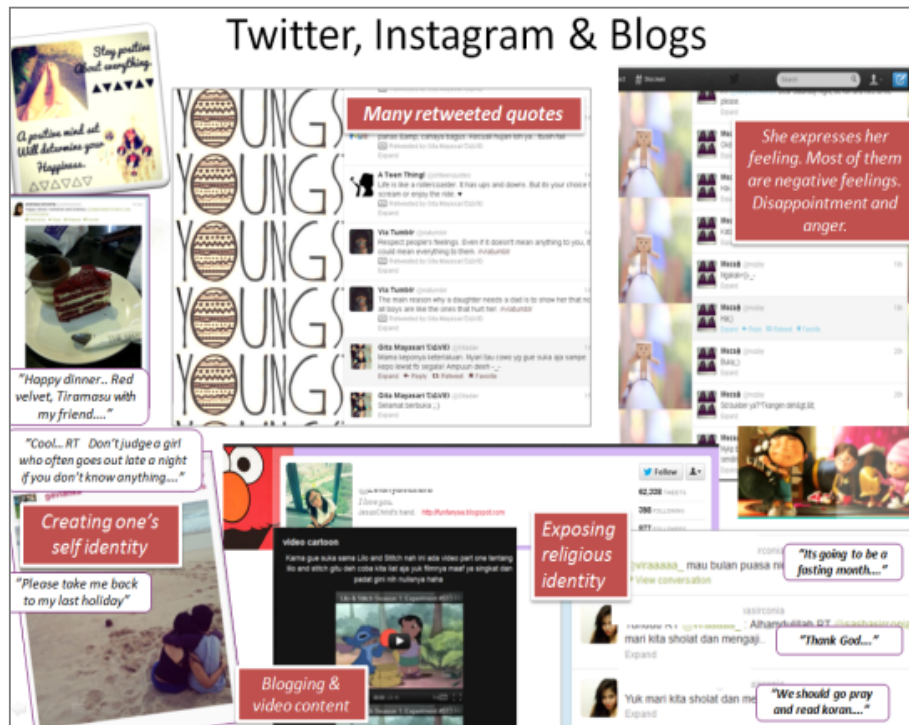
FIGURE 2. EXAMPLES OF TEEN SOCIAL MEDIA USAGE AND CONTENT

**FIGURE 3. EXAMPLES OF TEEN SOCIAL MEDIA USAGE AND CONTENT**

Aspirations and drivers in teen's life: Most teens aspire to be accepted, popular, modern and '*eksis*' (literally translated as 'to exist'), but also to make the parents happy and fulfil religious expectations. As the teen becomes older, she is also looking for freedom and her own independence away from the family.

"I feel free and it feels good, you don't have a burden, you don't have limitations and people controlling you. I don't want people to control how my life should be" (14 years)

However, for Indonesian teens, we see that the pull away from the family is less pronounced than perhaps in other (especially Western) countries. While there is a biological and psychological need to break away from the parents, the Indonesian culture of collectivism, respect for hierarchy (and elders) and harmonisation means that the family is still very much a part of the focus. This can be a key tension point for teens.

The concept of Eksis: Across the world, teens look for a way to make sense of their social world. In Indonesia, one set of labels that has emerged is the concept of '*Eksis*', which relates to being well known and popular throughout the school and social networks. As shown in figure 4, an Eksis girl is recognized at school, liked by boys and trendy. She has more 'followers' than those she is 'following' on Twitter. She is usually beautiful, does well in school and is involved in social causes such as the student association.

FIGURE 4. UNDERSTANDING 'EKSIS'
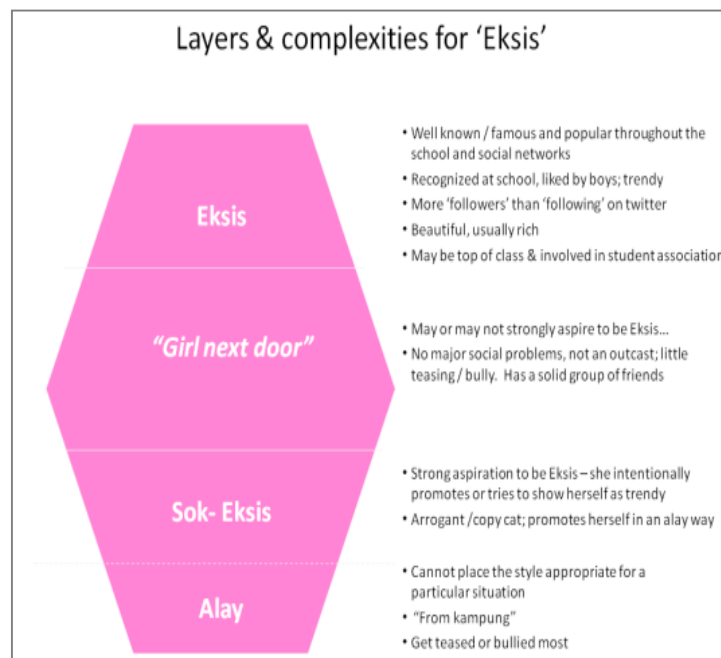
Being associated with an Eksis, in friends or gang, can insulate a girl from backstabbers, bullies, etc..

Long term aspirations. It is true that many things have changed for Indonesian teen girls in that they have greater opportunities and greater access to education and information. However, long term aspirations continue to be rooted in traditional definitions; ultimately she expects and desires to achieve a balance between her own personal aspirations (financial independence, own achievements, travel) and the societal expectations placed on her. Teens want to make her family proud, pay back or support parents. Additionally, for most, the parents' direction in life decision making (what and where to study, where to work, etc.) are highly influential and usually followed.

The traditional expectations for marriage and motherhood are the expected norm, and virtually inevitable, non-negotiable. But there is usually less of a sense of tension here; as most readily accept it. They aspire to be able to harmonise their own needs with these expectations – being a good mother and wife, respecting tradition but also being adaptive and resourceful being able to balance family and career.

"There are limitations… rules from parents, social norms or religious belief about gender that say as a woman the nature is 'to have a career at home, and not to create something useful outside the home'. Nowadays what happens is the opposite where women have something useful at home and have career outside the home. What she wants is to be a good Mum and housewife for her family, but she also has something to do outside the home" (17 years)

"I really love career women because they look very good. I want to be career woman because it's cool… it looks cool.. I just want to make my parents happy, that's my aspiration. About the profession, I don't have an idea yet.. But the important thing is to be a career woman with good clothes and the high heels" (16 years)

When talking to the older generation directly (young mums), we confirm these stages. Many talk fondly about independent years between school and marriage but have clearly experienced the shift as they entered the responsibility of marriage and motherhood.

Fears and concerns for the Indonesian teen: While the overwhelming essence of Indonesian teens is positive and optimistic, they do still experience many fears and concerns. Younger teens worry about not fitting in, or just not being 'eksis'. Many are in need of almost constant validation from their friends. For older teens, there can also be a fear of romantic rejection; parental and family conflicts can arise (usually around life choices); fear of not succeeding, fear around loss of face for the family.

"When people say bad things to me. Before it was their words were stabbing. They would make a joke out of my glasses.. and they'd say 'don't act as if you're pretty'.. Then they say something and mention something bad about my parents (divorced)" (14 years)

Understanding Friendship: As a teenager, there is a real emotional need for connectivity via close friendship. Confiding in a friend helps teens explore feelings, define identity and validate self-worth. Self-esteem and self-confidence is more often linked to their connections to others; often mediated and negotiated via friendships. There are two main types of friendship that support the developing Indonesian teen girl, the gang and the *sahabat*:

1. The 'gang'
Gang membership is critical for teens to satisfy the need for identity, connection (and also a sense of power and control). Gangs mostly are established at school and indicate different hierarchies within the school (fashionable/pretty, Eksis, sporty, etc.); and are often given names; for example, "pussy cat dolls", 'D'Childs', "Geng gaul' (trendy gang).

Mostly gangs are about having fun, and release (hanging out, joking, doing karaoke), but closest secrets are not shared. Gangs can also provide practical support, safety in numbers, e.g. if there is a bullying problem or another problem at school.

"We're not that close, but the important thing is that they are cool. We can act crazy, listen to music, jump around." (13 years)

"In my gang, I'm always happy and entertained. Gang is important if you are bored, alone, nothing to do." (12 years)

2. The sahabat (inner group of best friends)
The inner circle is collectively described as best friends or 'sahabat'. These groups usually comprise three or four best friends who really know and understand each other. Mostly these friendships happen organically and unconsciously, in that girls will gravitate towards each other 'as if by fate'.

For teens, the sahabat are like a 'second family'. As teenagers start to transition away from their family, the best friends provide that close, non-judgmental support. In fact, many even refer to members of the sahabat as their 'family' or 'sister' in the social media space. This 'sahabat group' is cohesive, when one member is missing, others really feel incomplete.

"They are like a small family. They take care of me, give me attention. If I have a problem, they are there for me. If we have a conflict, we try to solve it. they are my 2nd sisters. They replace my parent" (17 years)

"When I am at home, we can be protected by family. But out of home, we can be protected by our best friends. The best friends are the replacement of the family outside home." (14 years)

Social media and technology also help drive the closeness within the sahabat group. We see that they are in almost constant contact (more often than not via BBM or WhatsApp; but also Twitter and Facebook); so thoughts and feelings can be easily shared throughout the day. Their Facebook and Instagram sites are usually overloaded with photos and 'selfies' with the sahabat members.

The sahabat supports the teens in many ways (see figure 5).

FIGURE 5. SAHABAT'S INTEGRAL SUPPORT OF THE TEEN GIRL
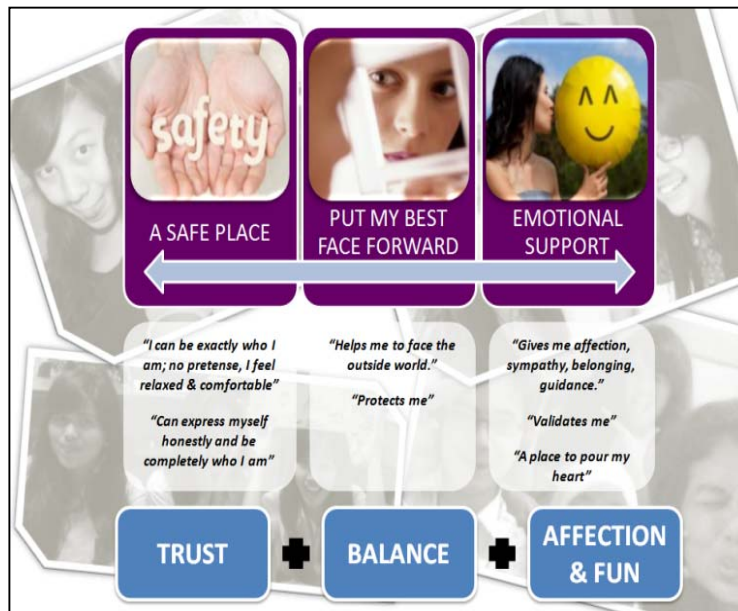
The sahabat provides a safe place where the teen can feel completely understood and where she can be exactly who she is without fear of judgment. There is a complete level of trust and ease, and secrets are kept.

"Sahabat is the one that really knows me deeply… Sahabat is the one who really will be there for me in the happy and sad moment. …the one I can share the bad things, but it's more to the fun things." (16 years)

"It is a trust. There is no backstabbing. We care for each other. Trust is like we tell you anything and you cannot tell anyone. Trust that they cannot harm us … no backstabbing, no lying." (15 years)

The sahabat will challenge her when needed, at times acting like her alter-ego. In many instances, if she is starting to veer off the societal norms, the sahabat will guide her back, providing advice they feel is in her best interest. In this sense, they can act as her voice of reason; ensuring balance in her life between fun and the obligation and expectations demanded upon her (family, religion, society).

Sahabat also help the teen practically, encourage her to follow her dreams, promote her to others, hide her weaknesses and give overall encouragement; becoming the balancing force for the teen.

"If I haven't controlled myself. I have done something wrong. They will advise me. If it's not good, they will advise me what's good and not good. They will control me" (15 years)

"Sometimes I'm lazy to eat. My friends say 'you have to eat now or you will be sick and if you're sick, we can't meet each other again'" (14 years)

"They are a good influence … like when I forgot to pray and they remind me to pray. There are many things. They are nice." (14 years)

The sahabat also provides critical emotional support and affection. They are always there for each other, listening, giving advice, making her feel more confident, putting a positive spin on life. The teen also feels validated and needed by her sahabat group. Friends have a huge impact on teen girls' self-image and perceived self-worth, just by consistently being there and making her feel loved, believed in and validated.

"When there's an envelope, there's a stamp. That's how close we are together" (15 years)

"They understand me … when I feel sad. It's like 'we know you are feeling sad. I know you. You don't have to feel sad because you have us now.'" (14 years)

"Friendship is who can understand me. And who can accompany me when we're sad or when we're in difficult times. They can make us happy or can motivate us" (14 years)

"My friends are even more confident than me. I was quite timid and shy before. But since I hang out with them, then I become like this, more confident and outgoing" (16 years)

Individual members within the sahabat bring together different personalities and skill sets and thereby provide a balance for each other in different aspects of their lives. In this, the supportive sahabat relationship makes the teen better than she would be on her own and can guide her through key challenges.

Yet, the sahabat group is also the space for laughter and fun! With unlimited connectivity, this kind of support and fun is almost on tap throughout the whole day.

Section 2: So what are the key tension points for Indonesian teens?

We see several opposing forces impacting on the teens. Due to her age and developmental stage she wants to break free, to be different, to make her mark as part of the next generation. This can be expressed through her clothes, language, interests, music which needs to be distinct. She is highly influenced by media and globalisation. But on the other hand, there is a very strong force holding her back to her society, culture, family and religion by which she is still very much bound. Rejection or rebellion of these cultural ideals is simply not possible for most Indonesian teens.

So we see there may be many tensions for the Indonesian generation Z, but we will focus on some of the core and understand how they negotiate these

Tension 1: The balance of distinctiveness vs. conformity

As we've seen, one of the core tussles for teens across the world is the need to be distinctive from the older generation yet there is still a strong societal and peer pull to conform. This is seen even more strongly in Indonesia. From a cultural standpoint, the focus is firmly about fitting in, rather than standing out or being different. It is about effortlessly and naturally attracting attention, without appearing to want it. In Indonesia, finding acceptable ways to stand out individually might include joining the school committee or excelling academically, rather than predominately by appearance.

Here, the option to go against society or break out and do things in a different way is not accepted. There is less security of life outside the social structure – breaking free or rebelling is usually not an option (nor is it an aspiration for most Indonesian teens).

As we've seen, the sahabat can be one vehicle to create distinctiveness within the collectivist framework. The group becomes the way to safely stand out (together), without breaking societal norms. The desire is for the sahabat group to be identified as almost the one entity (rather individually standing out). Hence we see by the naming of the sahabat group, wearing key markers of belonging (clothes, jewelry). The sahabat group can be a way of teens being distinctive in a safe way. This is clearly acknowledged in the global literature (Newman, 2010); but in the Indonesian context it seems to be even more prevalent given the strength of collectivism. Given this group context, all events, thoughts, feelings, actions and details of life are expected to be shared within the sahabat group and failure to do so can even be considered almost a betrayal of the friendship. The greater the sharing, the greater the cohesiveness.

The concept of 'Eksis' is an extension of this desire to be known (standing out without necessarily seeming to want to do so). Social media can also help with this in that a teen can actively try to enhance their 'eksistence' by requesting friends to connect with them or setting up a mutually beneficial agreement (both accept and endorse each other).

Social media has also provided a socially accepted way for teens to show their individuality. It can be used to create any persona or identity that the teen wishes. While it may not always be acceptable to stand out or 'show off' in the traditional Indonesian context, where it is more acceptable is in the online space. We see examples of girls portraying a completely different persona online in order for her to seem more appealing or attractive or 'Eksis'. For example, one of our teens shows herself online as a college student, another as a working woman in order to seem sophisticated, another portrays herself as a 'naughty girl', hanging out at bars. The heavy uptake of photo posting and constant reaffirmation on being 'eksis' is a clear example of creative self-expression.

Some are able to use digital space for promoting their creative achievements (fashion design, dance, etc.).

Tension 2: Finding her own voice and creative self expression
Teens are trying to find their own voice and outlet; to be able to find creative ways of self-expression that also fit within the Indonesian cultural context. They are trying to find communication spaces and expressions that are different to non teens. But for most Indonesian teens, this space is not rebellious, it's harmonious.

Whilst society and family may be somewhat overbearing on teens, we see several emergent areas of self-expression. The rise of social media has acted as a perfect platform for Indonesian teens to express themselves.

It can break through cultural barriers and allow confrontation or open dialogue to occur more easily; or at least for negative emotions and feelings to be discussed more openly. When we review our teens' social media conversations, much of it is around a negative discourse when teens feel sad or upset and are looking for attention, comfort and sympathy (which may be less accepted in the face to face context in Indonesia).

Trendsetters and experts agree and conclude that social media means that teens are more able to find and promote their own style, as well as express their feelings and thoughts. Some feel that it makes teens more mature and self reflective, in that they are often seen to be posting about spiritual or motivational topics / quotes. It also has the power to drive youth opinion and get them to listen to a particular issue. For example, a recent resurgence of Indonesian patriotism was largely driven by social media (with campaigns such as @Indonesiaunite). It can also it can give teens a vehicle for recognition and career development (such has been the case for female fashion bloggers).

"They try to reconstruct what is Indonesia and nationalism through their own way." (Expert)

"Social media gives more influence to teens than ads on TV" (Trendsetter)

"Teens are young but they think ahead. They are more mature, because of social media. They also share about spiritual … like now I see more often people tweeting positive things, like my student tweeted how to be righteous." (Trendsetter)

It is no doubt then, why Indonesians have embraced technology and particularly social media so passionately. It is not surprising that Indonesia fast became one of the leading countries for Twitter and that trending topics / words in Indonesia (such as 'galau' or feeling of being unsettled, confused, sad) quickly rise to global trending status.

"Galau, it is a drama… They talk about it because they want to be the center of attention, want to be asked "what's wrong with you". The mature person can stabilize and control their own feeling, but most teens cannot." (Expert)

We see other examples of creative expression. According to experts (Luvaas, 2008), young Indonesians are becoming much more creative and entrepreneurial e.g. starting small clothing design labels, producing media. We see examples of this even within the teen girls from the study – a couple of who are selling (and even designing) clothing items via social media, even at a very young age. Experts also see an emerging trend amongst slightly older youth (late teens, early 20s) whereby there is an increase in entrepreneurship and also passion based (often creative) careers, as recognition of talent rather than following a traditionally academic route. [Interestingly, this creative entrepreneurial spirit we see emerging amongst youth in Indonesia has been predicted by some experts and press to be a key driver of the predicted economic future prosperity of Indonesia].

Indonesian teens also have grabbed onto many creative and expressive hobbies such as photography and photo editing, in a way to give themselves a voice as a creative outlet. They openly love to be 'narcissist' with the use of photography in social media as a key form of narcissistic outlet and hence a way to grab attention indirectly.

Tension 3:   Balance her own needs with those of her parents and society
In other (especially western) societies, the thread holding the teen and family together gradually weakens across the teenage years, where they are allowed to 'fly the nest' so to speak. In Indonesia, while teens are trying to grow and develop their own space, they still want to keep the thread strong. This is driven by the larger space of society – religion, collectivism, respect, tradition, and values.

As we've seen, for Indonesian teens, there is a clearly defined expectation on life experience and achieving life goals. These tend to be very linear, and that life stages (be it study, travel, working, marriage) should be done in a certain order at a defined life stage.

Teens need to carve out their own distinct identity, but the pull to stay where there is comfort and security is strong. This is drilled into the teen over the generations where it is part of her makeup – respect, non conflict, religion, values, etc.

Disrespecting her parents is not acceptable in any way and pursuing her dreams in an unconstrained way or at any cost is not allowed. Individual aspirations and desires come up against a wall of collectivism and social needs.

For Indonesian teens, we see that the family still plays a very key role in many of the aspects of life, including driving the direction of key life decisions, such as what to study, where to work, when to marry, etc. For example, in a recent survey by YouthLab (2013), 72% say parents dominate their choice of study.

For many of our teens, the pressure from parents can be too strong and they may feel unable to rock the boat and rebel. They may end up simply going along with their parents' wishes without much hesitation or discussion (even if it's done begrudgingly). However, we see examples where this is starting to change and teens are starting a certain level of negotiation in order to reach their needs:

"I wanted to study psychology but my father wanted me to study accountancy. I guess I'm a bit of a tomboy because I love to play football. But when I started to wear the jilbab (hijab) I was able to prove to him that I was growing up now and that I choose to live by Islam. So he realized that I was able to make my own decisions. In the end, he agreed that I could study what I wanted and he let me to keep playing football with the boys too!" (17 years)

The sahabat can also be key to help ease the tensions for teens. For example, if the teen has fought or disagreed with the family, the sahabat is the only place for disclosure; in that it becomes the safe place to confide without a loss of face and lack of harmony in the family. Best friends usually encourage friend to smooth it over with parent, apologise and follow parent's suggestions. They act as the voice of reason and the enabler of harmony.

Some of the experts also talk about a phenomenon where young people negotiate this tension by following their parents' wishes in terms of study but starting their own passion based business or endeavour (be it DJ or fashion designing) in their spare time.

We see a similar trend amongst the older generation of new mums. We see many of these mums are starting to find their own way to negotiate a balance between societal expectations and their own needs by starting small home-based businesses or taking in small jobs into the home.

A very clear example of a brand who has tapped into this particular tension is from the telecommunications provider 'Tri' who in 2012 released TVCs that openly discussed these Indonesian teen issues and youth tensions. It spoke about an irony about the meaning of freedom for Indonesian youth; about the tension between the need to break free and the rules or demands set down by society. This connected very well with Indonesian youth and soon went viral digitally and across social media (especially Twitter).

Tension 4: Balance modern, global influences with Indonesian tradition and culture
In this, Indonesian teens seem to be able to almost seamlessly negotiate a balance between the influences of globalisation, yet largely staying true to their cultural and traditional roots. There are many examples of global trends being modified or localized in Indonesia.

With the resurgence in Islamic interest and focus, there is a movement for many to show themselves as a good Muslim, but in a trendy way, affirming themselves as modern and fashionable. Therefore there has been a merging of these two areas with the trend of the '*jilbab gaul*' (trendy hijab) style of Islamic wear. This has become a key fashion symbol and a way to balance traditional and modernity; but also a way to express their identity.

While fashion has become the status symbol, many are incorporating elements of traditional Indonesian within the designs and clothes they choose to wear (e.g. using the traditional fabric of batik).

We see other trends in music and the arts. For example, we see merging of Indonesian and foreign music styles, whether it be bands like SM*SH, which mimics the look and style of Korean boybands or Indonesian rap such with political content such as Jogja Istimewa or Indonesia hip hop B'SouthGank or Java Gangnam Style In the arts, graffiti artists like Darbotz who combines graffiti style with obvious batik influences.

FIGURE 6. EXAMPLES OF YOUTH CREATIVE EXPRESSION & HYBRIDISATION OF GLOBAL VS. LOCAL STYLES

CONCLUSIONS

Obviously generation Z in Indonesia represents a changing force in Indonesia, yet the need to balance the pace of change whilst staying true to their cultural roots and expectations is very apparent. It is important for brands to keep abreast of these changes and to understand this unique psyche and to be able to tap into it in a way that is truly relevant, and also engages, both in the traditional media and digital / social media spaces.

We have seen that teens interact and portray themselves in very different ways, depending on the medium and the situation. Therefore, from a research perspective, a mixed methodological approach is imperative and should include: online activity and/or observation, self-directed methods, allowing teens self-expression, observational research and discussions with teens (alone, and with the friendship group).

For marketers and brands, there are obviously many things to consider when targeting and communicating with Indonesian Gen Z. An acknowledgement of the core tensions faced by teens, either directly or indirectly, may be very powerful.

Clean and Clear has integrated much of this understanding on generation Z in Indonesia into the brand and especially in communications being developed which are able to better connect more thoroughly with teens and reflect their lives in a more aspirational way.

Clean and Clear is well known for highlighting teen friendships within its brand communications. On the back of this research, a much greater understanding of teen friendships has been achieved. Recent communications have shown the sahabat friendship in a more relatable light, with the right balance of closeness, understanding and fun within the small group. The sahabat is portrayed as supportive, close and with substance (very much connected emotionally and not just tagging along with the main girl). The sahabat is able to provide advice and support and is portrayed as being much more integral to the teen's life. Key friendship roles have been portrayed and real shared fun via togetherness, bonded friendship.

The setting and scenarios shown in the communications are also able to more realistically connect with teens. The Fruit Essentials execution (2013) portrayed activities that show more aspirational togetherness such as travelling to different parts of Indonesia, teens seeking their independence and identity together as a sahabat group. Also, the recent Foaming Facial Wash (2014) commercial highlights the young teens' desire to break free from parents, but in a culturally sensitive and safe way, with the sahabat group.

The personality of the C&C girl has developed now a bit more edgy, daring, energetic and exciting. Yet she has more depth; and always being supported by her core sahabat. She is in essence, a natural, yet sweet Eksis; confident, trusted, real and down to earth but a natural leader. Another example of the Clean and Clear initiatives is the Adios Komedos campaign of 2013. This somewhat tongue in cheek digital campaign was able to connect with teens in a funny and lighthearted way. It connected well with teens through unique execution and also via games and activities on Facebook.

In summary, when communicating with Indonesian teens, it is important to acknowledge and understand the core tensions and forces on play in their lives. It is important to talk teen's language, show an understanding of their need to break free and strive for independence, yet in a culturally relevant way and without being over rebellious as such. Indonesian teens want to stand out as a whole sahabat, with less focus on showing off at an individual level. It is also important to showcase and celebrate their sense of creativity and group cohesiveness; and also to show the emergence or hybridization of Indonesian and global trends and influences within the teens' lives.

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THE AUTHORS
Dawn Herdman is President Director, Illuminate Research Asia, Indonesia.

Vikas Srivastava is General Manager, Consumer Division, Johnson & Johnson, India.