

Embracing The Un-normal

Webinar 1:
Indonesian Sentiments: Helping Your Consumers Regain Control

14 May 2020



illuminate

Strategic Insights Consultancy

A Member of **PERPI**

ESOMAR¹⁸
corporate



THE INDEPENDENT
RESEARCH INSTITUTES
NETWORK

The global pandemic has affected how people think and behave in their daily lives - within a short period of time, a lot of things have changed

At Illuminate Asia, we wanted to understand how people are coping and adapting ..
...and we wanted to help our clients make sense of it all

Therefore, we have done our own research:

- We joined a global collaborative initiative called “Not Everyday Life”
 - Across 42 countries; with a total of 323 in-depth interviews conducted
 - We conducted research across Asia Pacific (Indonesia, Malaysia, Australia, New Zealand)
 - This is an ongoing initiative
- We also conducted a series of focus group discussions in Indonesia on the topic of how Covid19 has changed consumers lives



The mindset profile of people we talked to...

Indonesia – 13 in-depth interviews (across demographics & regions), 2 focus groups
South East Asia – 17 in-depth interviews across Malaysia, Singapore, Philippines

Upper class

- E.g. Site Manager, Engineer, Obgyn, General Manager, student
- Compassion displayed for the underprivileged, by making donations.



Middle class

- E.g. Army, Lecturer
- Well-informed; try their best to maintain their health & wellbeing,
- Aware that the current crisis may last longer than expected so they try to be prepared.



Lower class

- E,g, Masseuse, taxi driver, maid
- Most concerned about their financial conditions
- Highly concerned about making ends meet from day to day



The pandemic and ensuing lockdown has represented a loss of control for many

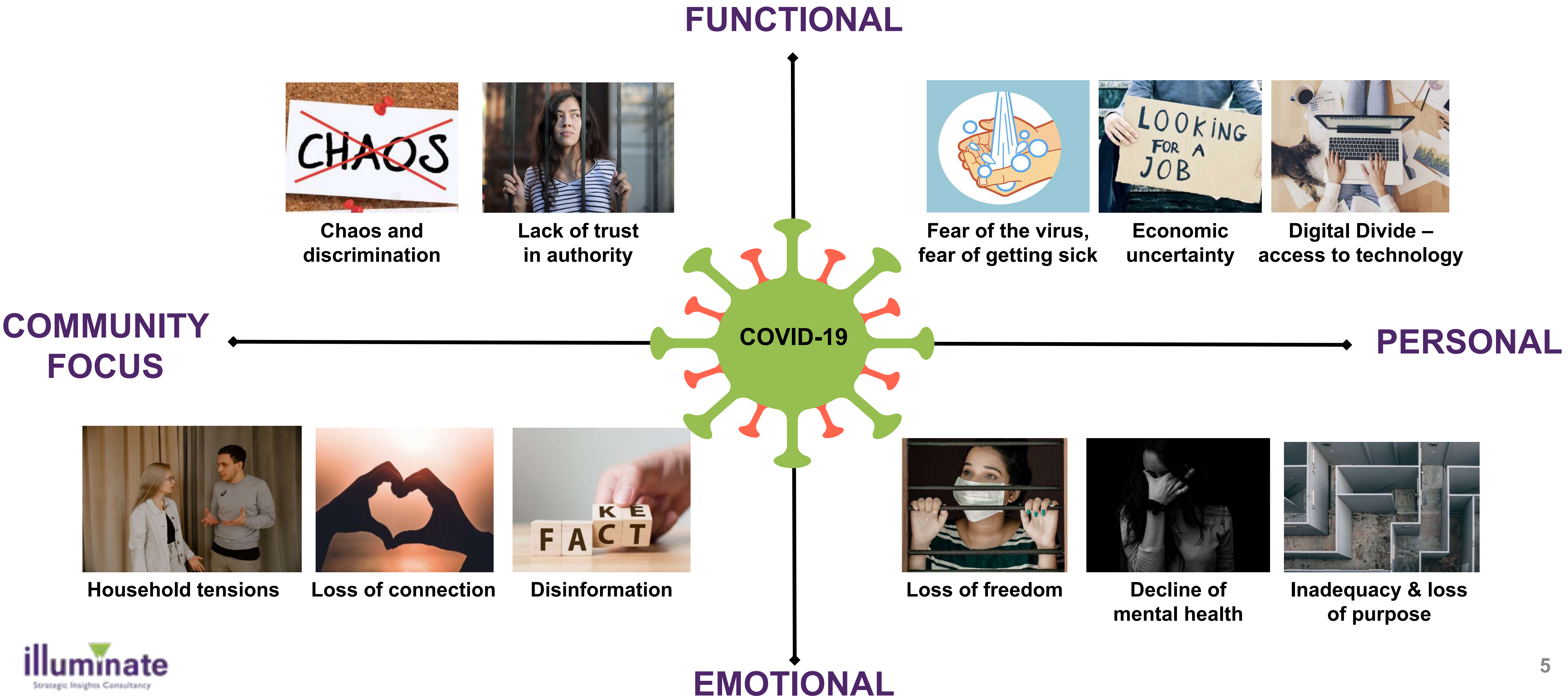
Routines have been disrupted, changes are happening fast (and often with a level of confusion) and an underlying fear of an uncertain future on the horizon

- Loss of control is a distressing human experience
- Coping mechanisms & adjusted behaviour as a form of taking back control - either consciously or subconsciously



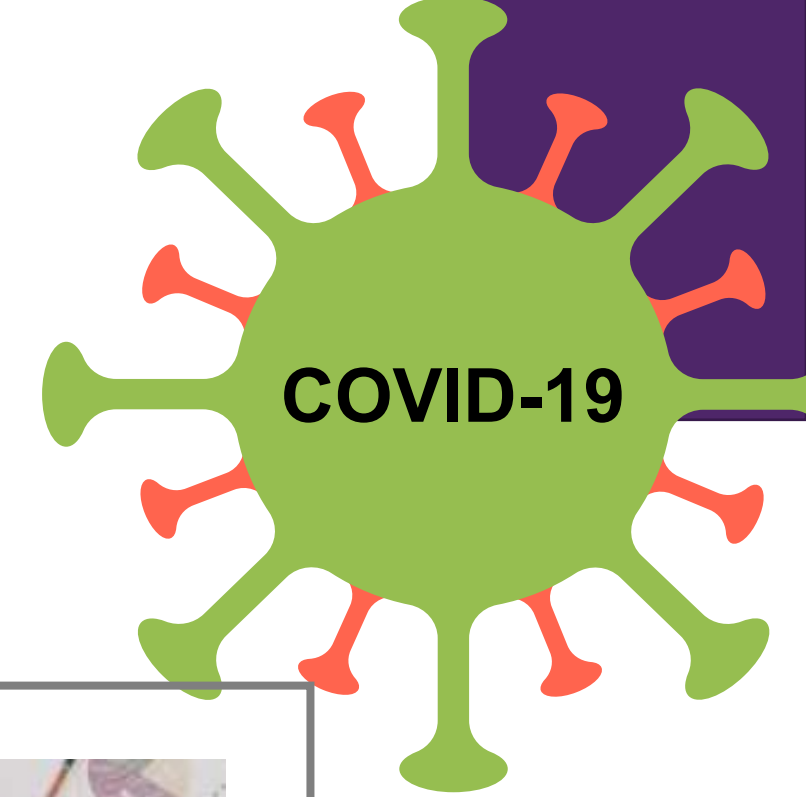
Indonesians' fears, anxieties are manifested at different levels

And many are concerned on how it may impact Indonesia in the long term – they often feel out of control of the current situation



Fears & Anxieties – Personal & functional

On a practical level, there are many concerns



Economic uncertainty

- Lowered earning power
- Threats over job security
- Concern over price rises



Fear of getting sick

- Concerns about hygiene quality
- Fear to leave the house (some)



Digital Divide – Access to technology

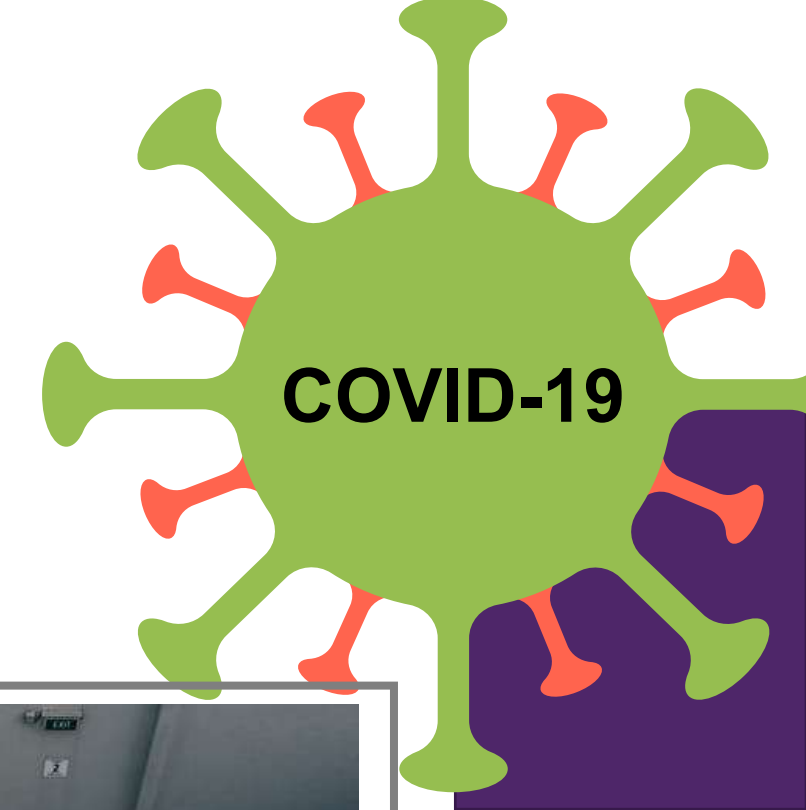
- Inequitable access
- Technological frustrations
- Mistrust of online shopping (some)

“There is concern that this pandemic will continue until next month or more. I am worried that the price will be increasing significantly due to the corona outbreak and that I cannot make money for the family.”

“Every time I come back from shopping for groceries, I feel dirty. Am I infected? I just feel afraid to get sick by this virus.”

Fears & Anxieties – Personal & emotional

Uncertainty, social isolation and immense change is having a strong impact in the mental health space



Loss of freedom

- Rise of cabin fever, boredom
- The inability to pray at mosques or worship together, especially during Ramadan
- Blurring of spaces



Decline of mental health

- Feeling of being overwhelmed
- Uncertainty brings stress
- Low threshold to disruption
- Time management struggles



Inadequacy & loss of purpose

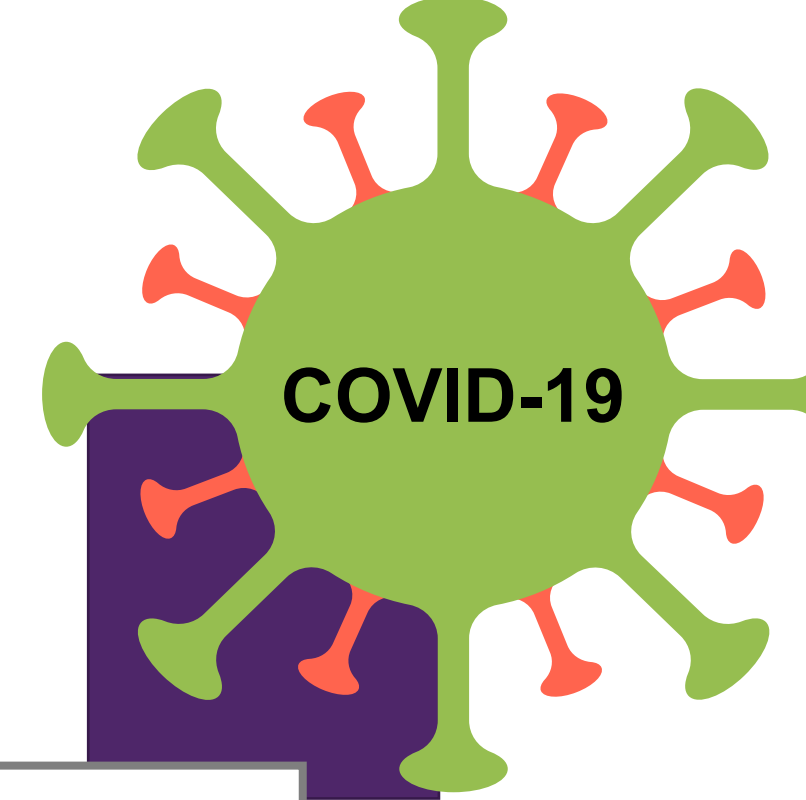
- Lack of commitment, discipline
- Feeling useless & demotivated
- Emotionally drained
- Inadequacy in new roles

“The elders still insist to go the mosque, so it’s a bit difficult to convince them to just pray at home until this pandemic is over.”

“I fear that this might be the end of the world. Which means that this could be a setback for humanity, as many people will die, and the economy will collapse.”

Fears & Anxieties – Community & Emotional

Social distancing and lockdown creates some unexpected tensions



Loss of connection

- Loss of real connection or physical interaction
- Fear changing social structures



Disinformation

- Increases confusion, anxiety
- Requires greater energy and processing



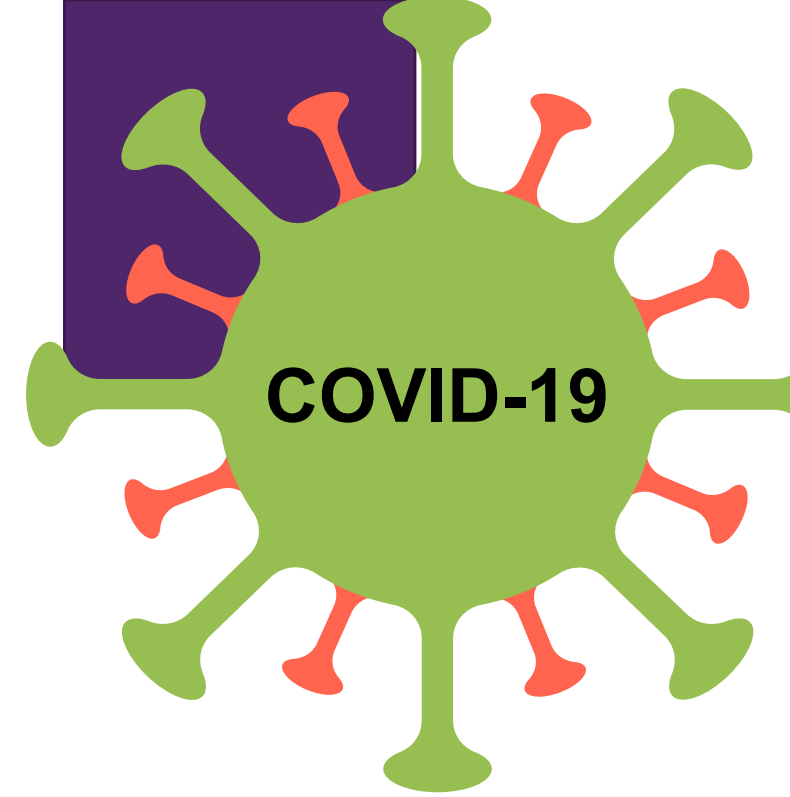
Household tensions

- Family tensions, arguments
- Lack space & boundaries
- Balancing roles – caregiver, worker, educator

“There is a lot of hoax information regarding coronavirus and many believe it without crosschecking it. Lots of people over-panic because of that information”

Fears & Anxieties – Community & Functional

Concerns over the way authority figures handle the pandemic



Chaos and discrimination

- Fear that the pandemic will further divide society
- Concern for social unrest



Lack of trust in authority

- Government's inconsistent messaging; lack transparency
- Too little too late – lack action
- Unfulfilled expectations

*"I'm actually afraid of the commotion that this situation would bring...
If this situation continues and government do not give the right
understanding to the society, I'm afraid things will get worse."*

So how do Indonesians cope & start to regain some control in this situation?

Indonesians have always been resilient... And never more so than now...



So how do Indonesians cope & start to regain some control in this situation?

Indonesians are resilient, and are developing new ways of coping

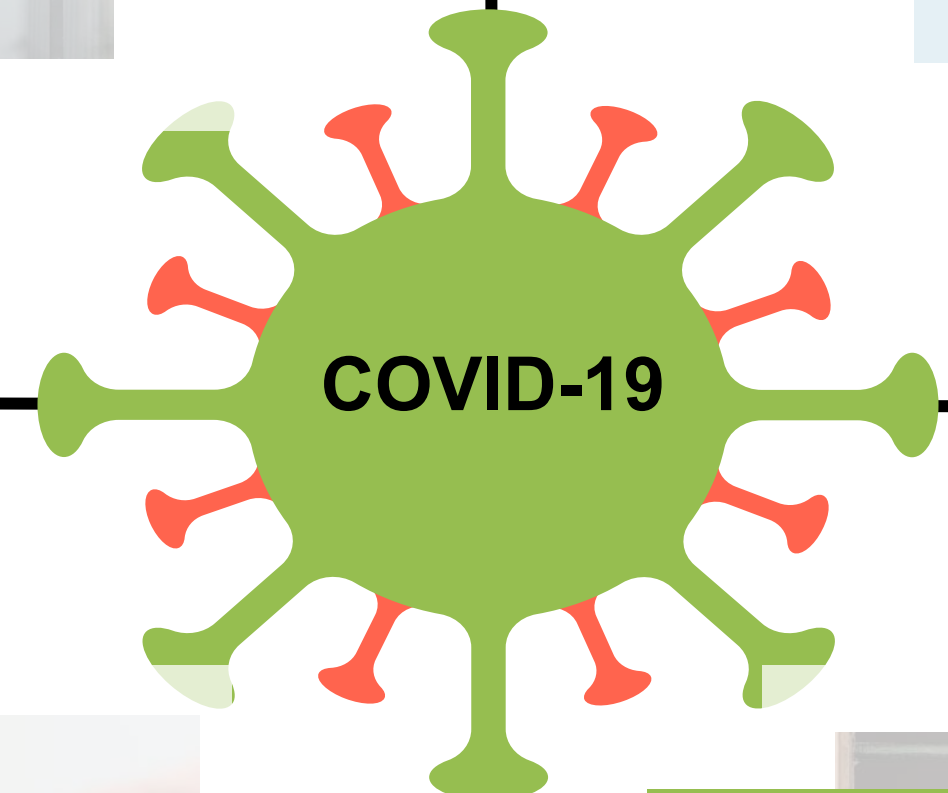
FUNCTIONAL

Local community take initiatives

Enhanced health & hygiene rituals

Managing economic situation more closely

Enabled by technology



COMMUNITY FOCUS

PERSONAL

Recognise one's own privilege – altruism

Maintain connections

Manage close relationships

Coping via religion

Experimental mindsets & opportunity to self improve

Deliberate strategies to manage mental health

EMOTIONAL

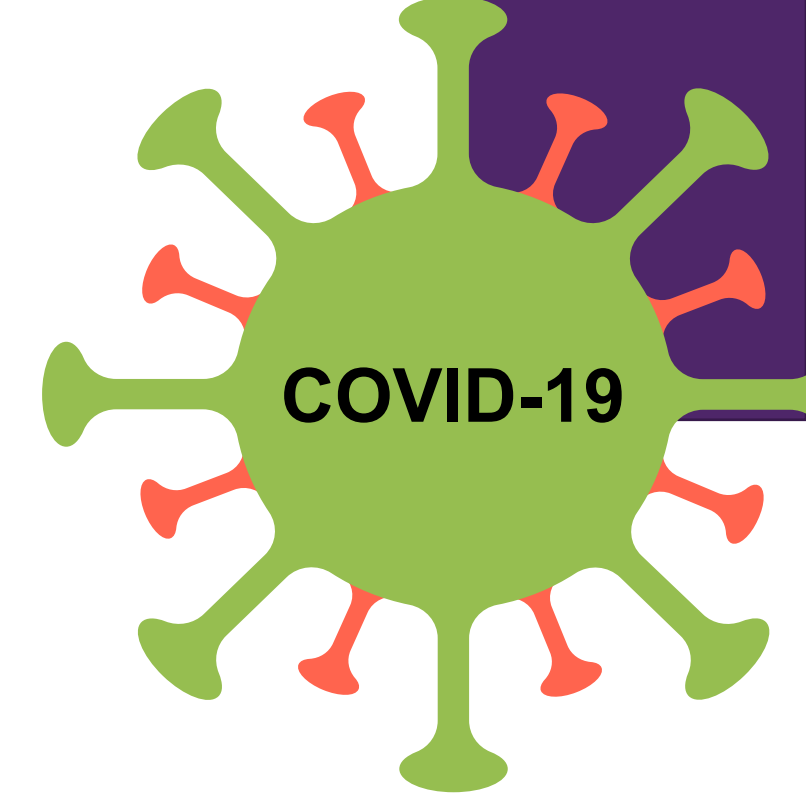
Overwhelmingly, the enabler to cope is the enhanced use of technology

It permeates across all aspects of our new lives

- Many have been forced to adapt to new technology, even those who previously were less accustomed
- Online shopping & home delivery has increased dramatically; with more trust
- New opportunities for remote working, learning, socializing and even worshipping – has brought new possibilities



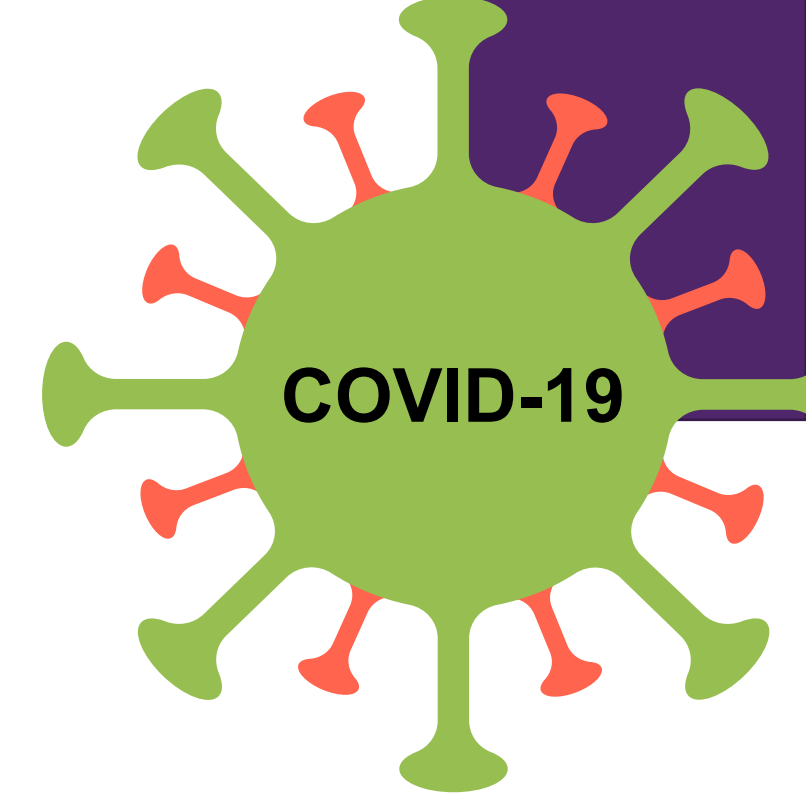
Managing economic situation more closely



*“I offer services such as laundry to make it easier for people. So they don’t have to go out from their house.. Also for shopping, I am doing some customer’s monthly shop for them. This was my own initiative” –
Gojek driver*

- Consumers are more careful on spending, trying to save a little, if possible
- Digging into personal savings and rely on community or relatives’ assistance
- Looking for other forms of income, new business models emerging

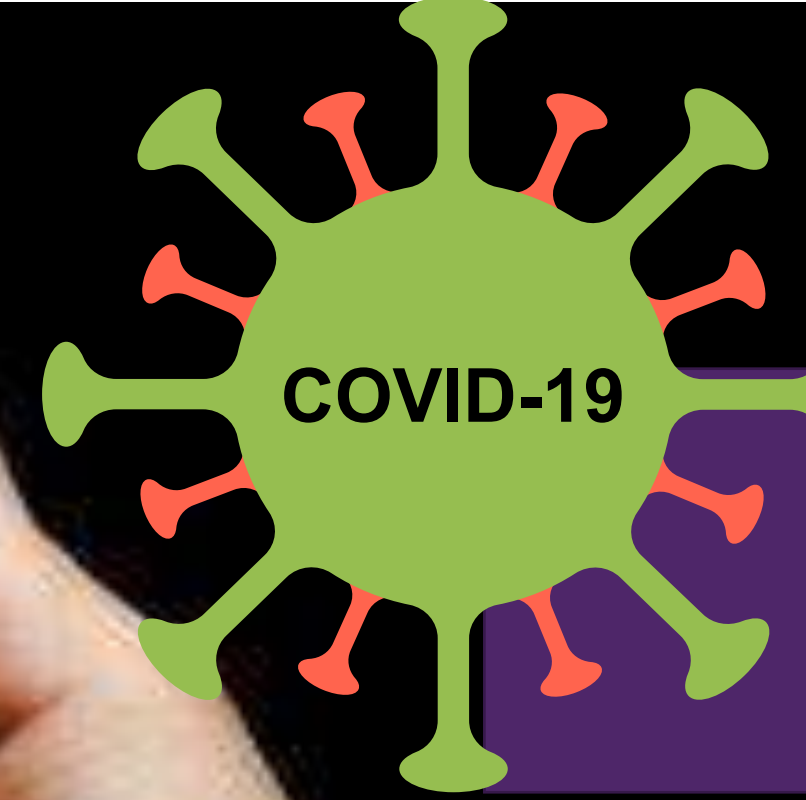
Enhanced health & hygiene rituals



- Extra steps and rituals undertaken:
 - Wash hands, shower more often, mask, hand sanitizer
- Anti-bacterial brands more critical
- Household cleanliness also increased

“I could take a bath up to 4 times a day during this pandemic situation. It’s a hassle, but I must do it.”

During the pandemic people are seeking more solace from religion.

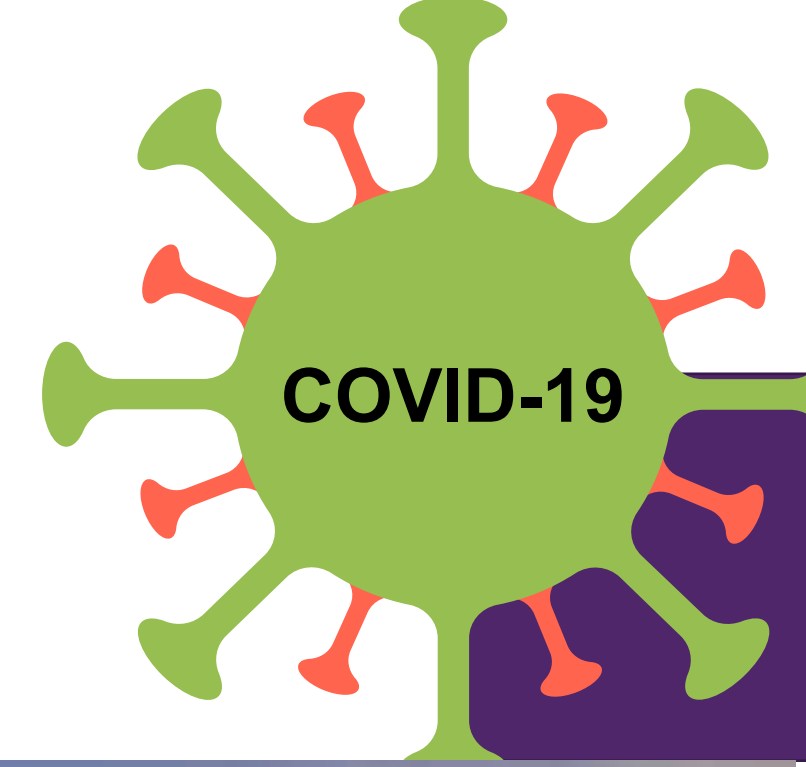


- More discipline (and time) to perform religious practices:
 - A way to seek inner peace
 - Stronger relationship with God
- Tensions arise when the sense of duty for religion conflicts with the need for social distancing

“I hope that this will be over soon. I hope that people continue praying to Allah, don’t stop praying and I hope that people will improve themselves.”

The area of mental health is of particular importance in these times

It becomes a salient topic of conversation



Managing Mental Well-being; avoid negative emotions

- New acceptable forms of escapism & recreation
- Avoid being overwhelmed, avoiding stress where possible
 - Limit time reading news and social media

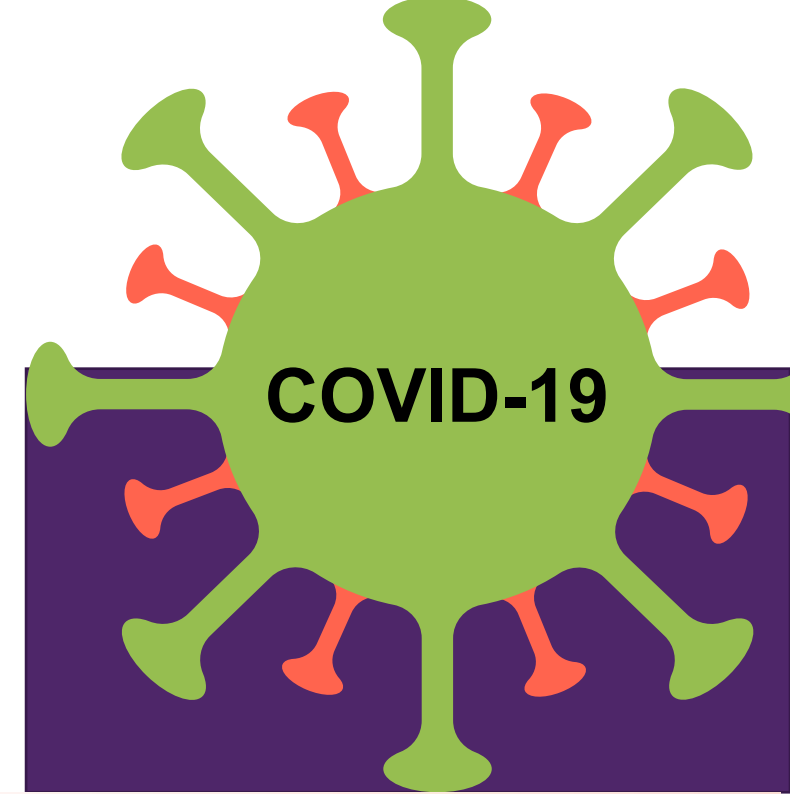
“I never thought that I will be very happy just by going to Alfamart. At least I can go out and shop, away from the stress from handling my husband and kids”

“I tried to install Tik Tok to help me finding some form of entertainment”

Experimental mindsets & opportunity to self improve

- A time of reflection, learning from past mistakes
- Improve key aspects of their lives; try new things
- Try to stay positive, try to accept the situation

Maintain connections and close relationships



Maintain connections

- Embraced technology to connect
- Upside to lockdown is more quality time with family

Manage close relationships

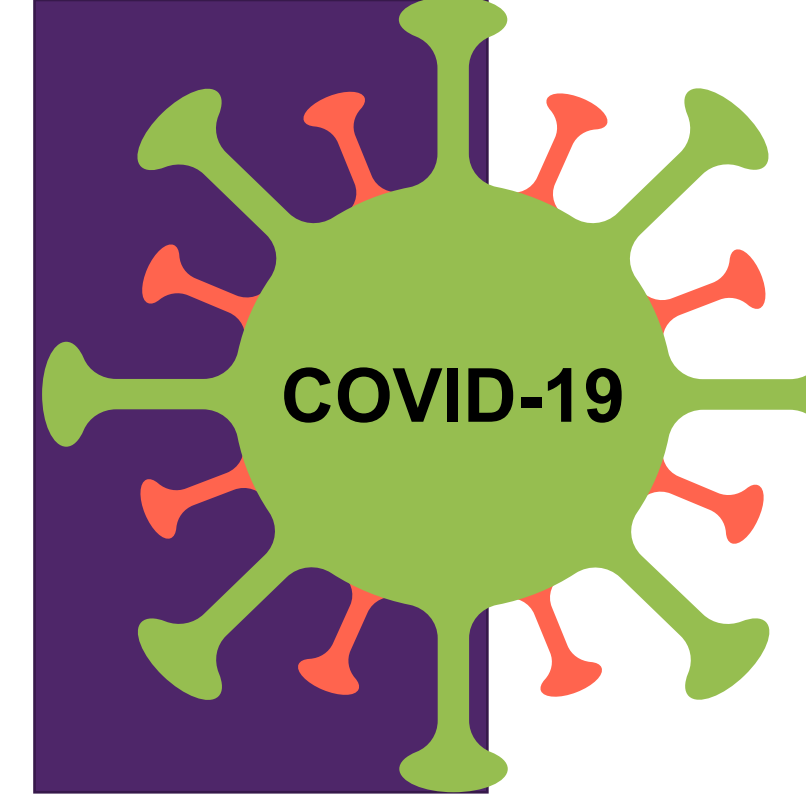
- Give space when needed
- Enhanced negotiation, more discussion
- More equitable division of labour in the household

“I spend time on my own, I don’t know what to do. I can still call my friends, but I miss the sense of humans, where I can meet them face to face.”

“Well, the good thing is that I can be closer to my family.. I know their activities and so on. I feel that we have strong bonding now.”



Helping others; Resilience that stems from collective power when facing adversity



Recognise one's own privilege leads to altruism

- Those with means recognise their duty to supporting others
 - Donations (money, food, products)
 - Education on hygiene

“I just really hope that things will get better soon, especially for the sake of those who are underprivileged. They are the ones who truly need our care and assistance.”



Local community take initiatives

- Disappointment in the government's handling of the crisis in a timely manner
- Many local communities to take charge to:
 - Help prevent the spread of disease
 - Provide practical support

“People did not just wait for the government to reach out to people in small villages and give them the support they need during this crisis”



Conclusion – What does this all mean for brands?

So what should a brand do in these times?

1

Be empathetic, take a back seat

2

Understand the consumer's need for control in your category

3

Help them to ease their mental burden

4

Be a good citizen

1. Be empathetic, take a back seat

It's not about your brand, it's about the consumers

- **Resist the temptation to talk about yourselves** - Focus entirely on how you can help consumers to overcome their fear and anxiety
- **Sincerity is the key** – consumers see what your brand says as well as does. They will see through the superficial attempts to exploit the pandemic
- **Tone of voice is important**
 - Empowering, compassionate; not fear mongering
 - Friendly tone, not manipulative
 - Essential not to appear opportunistic, capitalising on vulnerability
- **Stay true to the brand essence**



Aqua Danone #stayathome billboard – “For the first time, we don’t want you to see this billboard”

Example of questionable tactics – The case of Social Distancing Logos



Some brands decided to try to show solidarity with the situation but modifying their logos to show social distancing

- But... There are risks to this strategy:
 - Superficial & narcissistic
 - Not showing empathy or understanding of what people are going through
 - Does not help their customers in any way

Example of ads that get it right – Those that Empathise and Do not seek to overtly gain from the situation



The Anti-Advertising ad by Fritolay

- This crisis is not about brands
- *"More action, less talk"* – Shows how brand supports
- Effectively ad-shames other brands who are seen to be taking advantage of the situation



The understanding brand

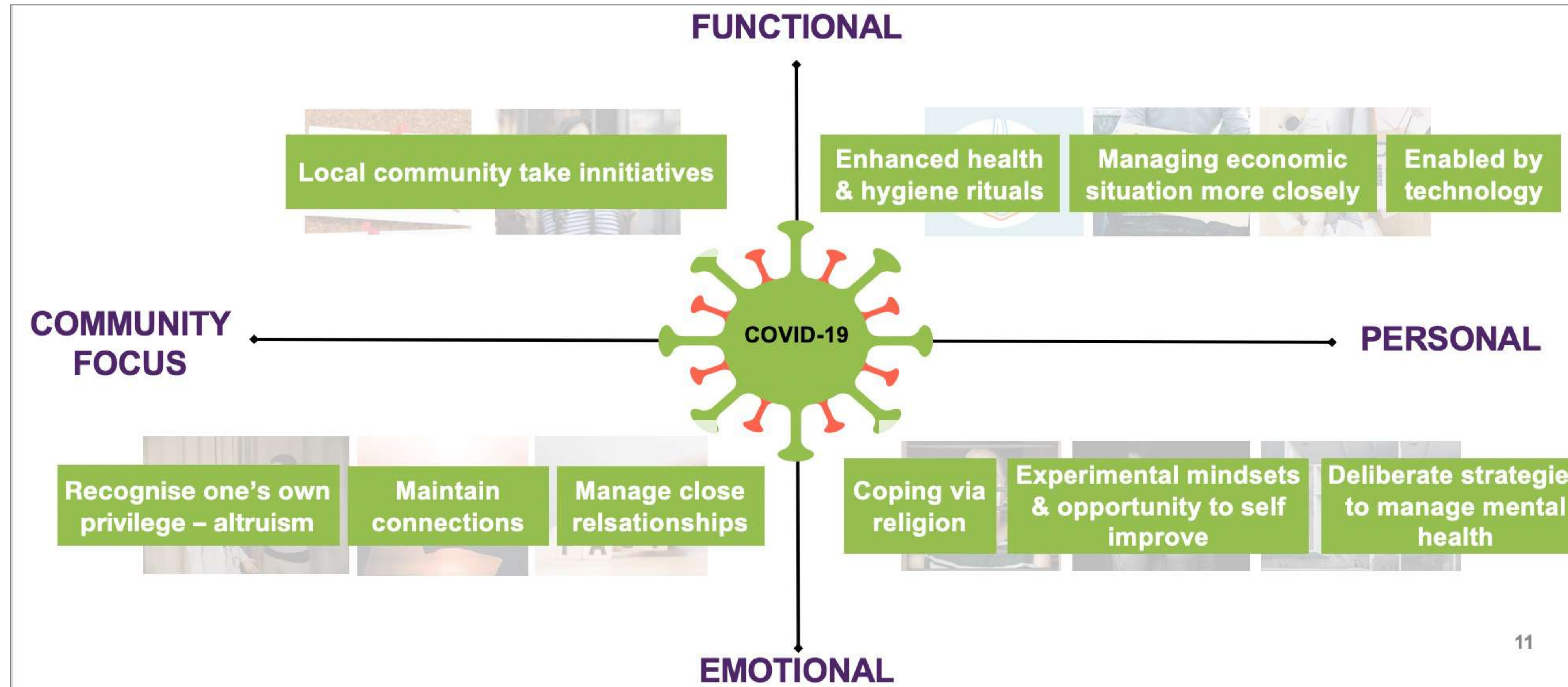
- Understands people's struggles to get through lockdown
- Empowering, focuses on connections
- Provides assistance & resources
- *'You're there for each other, we're here for you'*



BirdsEye

2. Understand the consumer's need for control

Position your brand as a coping mechanism and help your consumers to regain control of their situation



2. Understand the consumer's need for control

Position your brand as a coping mechanism and help your consumers to regain control of their situation

- **Be present, be helpful and play a relevant role.**
Think about how your brand can help people in their new day to day; consider their needs
- **Think about the role you can play** – what can you do to bring a benefit to people who are anxious, unsure, financially restricted and physically confined.
 - Recognise this tension
 - Adjust product and service offers
 - Adjust pricing and contractual conditions
- Think about how your brand can **help people in their new day to day life**; consider their needs
 - Give resources and help to navigate new daily life – parenting, teaching, cooking



Hyundai Assurance Program in US (2009) – Helping anxious buyers who were hit by 2008 financial crisis. Buyers who are concerned about their financial situation can give the car back if they lose their job within a year. Hyundai market share jumped from 3.1% to 4.3% in the first ten months of 2009.

3. Help them to ease their mental burden

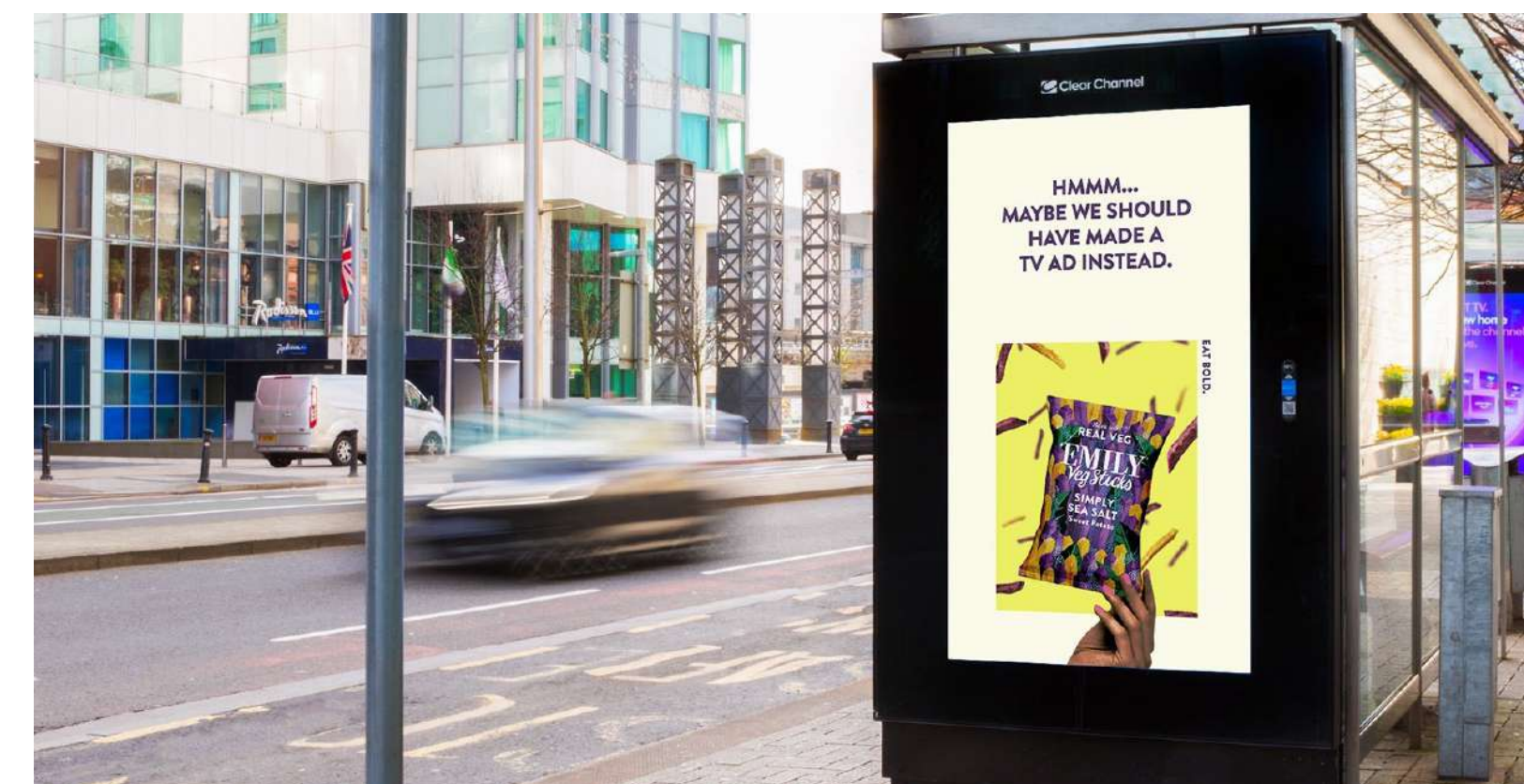
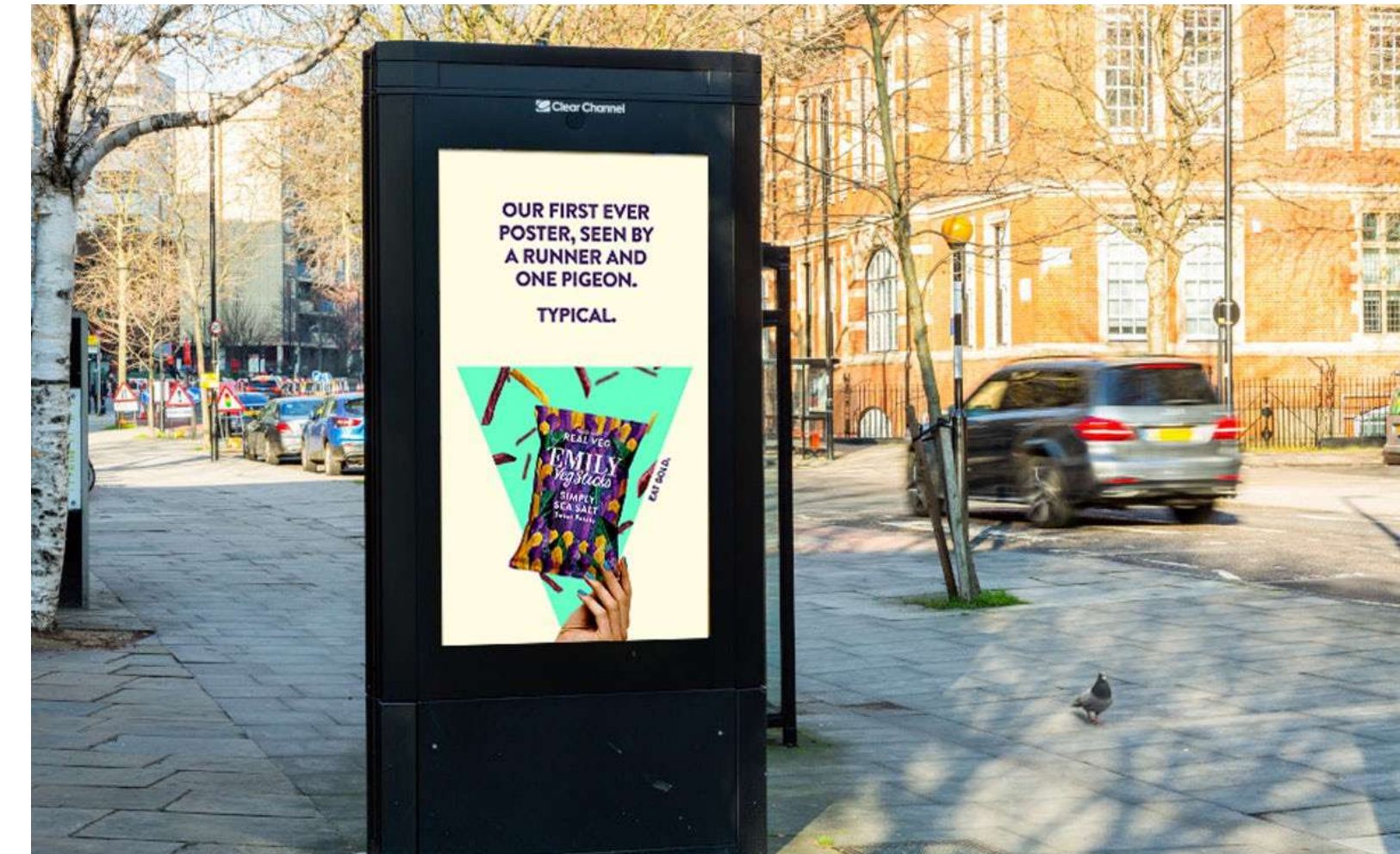
Mental health is increasingly important – whether alleviating boredom, mental escapism, avoiding stress or actively improving oneself

Brands can have a role to help to:

- **Provide escapism and comfort** – more experimental, so opportune time for brands to launch new products
- Provide **simple tips to manage mental health**
- **Promote role-sharing within the family** to ease the burden of parents and children alike
- **Don't be afraid to use humour** – people need a laugh



- “Suami Masak Apa Hari Ini” FB page (Malaysia) for lockdown
- Site for husbands to sharpen cooking skills and share cooking ideas



Emily Crisps (UK) use of humour in outdoor media
<https://www.marketingweek.com/emily-crisps-outdoor-advertising-lockdown/>

4. Be a good citizen

Take a more active role in the community, give meaningful service

- Brand is the human face of the company – **ensure it plays an active part in the society**
- Use the brand purpose is to show how a brand can make a **positive impact to the community**
- It is more important to communicate beyond advertising & **do something real and meaningful** to help the people impacted by the crisis
- **Be consistent** – good citizenship also extends to internal stakeholders
- **Help consumers to help others:**
 - Help facilitate local community initiatives and assist people to be altruistic
 - Take care of the marginalized



Tokopedia #SatuDalamKopi campaign to help more than 1000 coffee players to reach the consumers during pandemic
“Together maintain the country’s economic industry”

How companies respond in this crisis will help shape and define their brands for many years to come.

Last but not least: Don't go dark

It is important to build your brand now for post-pandemic conditions

Now is the time to communicate:

- **Consumers are seeking connectivity** with brands that can help them
- **You have a captive audience** – consumers are engaged & focussed
- **Continuity of brand messaging can be reassuring** – brands are talking to consumers before, during and after pandemic
- When a brand stop communicating during the pandemic, they risk:
 - **Loss of a golden opportunity** to create meaningful relationship with consumers
 - **Loss of brand salience**, loss of brand equity (& association with key brand characteristics)
 - **The need to rebuild at a later date** in a more cluttered market with a less engaged audience

“Going dark did not feel like the right thing to do. At times of uncertainty consumers really appreciate having a consistent message.”

**- Sarah Koppens, Marketing Director
Birds Eye (Source: Marketing Week)**

But.. Finally... Remember to still be distinctive in your communications



We can help you figure out how to stand out from the clutter through our semiotics analysis frameworks

THANK YOU!

See you next week in Webinar 2!

illuminate
Strategic Insights Consultancy

PT Illuminate Research Asia

Graha Indomonang 2nd Floor

Jl. Mampang Prapatan Raya No. 55,

Jakarta Selatan 12760, Indonesia

P. +62 21 798 1148

www.illuminateasia.com

 [Illuminate Research Asia](#)  [@asia_illuminate](#)  [@illuminateasia](#)

A Member of  