

Embracing the Un-Normal
Covid 19 Free Webinar Series

Indonesian Consumer Sentiments about New Normal

Using Social Listening & Discourse Analysis
to Understand Current Consumer Attitude

Thursday, 25th June 2020
2 PM JKT

Registration Link:

<https://bit.ly/unnormal5>

You will receive Zoom link one day before the Webinar



Speakers:



Marhaiza Mohamed
Strategy Director - Illuminate Asia



Elga Yulwardian
CEO - Ivosights

The global pandemic has affected how people think and behave in their daily lives

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

Now that social restrictions are starting to ease and we are approaching the 'new normal', we are keen to understand how consumers are feeling about the transition back into a more normal life





Key Insights from Social Listening

As seen from the Ivosights presentation, several broad themes emerged

4 themes chosen as the focus of this presentation:



1. Food & Beverage



2. Shopping



3. Travel & Tourism



4. Health

Our approach

1. We used Ivosights program to generate the raw data from social media postings
 - Focus on last 2-3 weeks
 - Filtered out any obvious corporate postings
2. Analysed the posts using discourse analysis
 - i.e. the written language expressed in the postings are studied within the social contexts

Social listening indicate a spectrum of emotions towards the easing of restrictions and the 'new normal'

4 key typologies summarised the different reactions and emotions among Indonesians

THE ANGRY REJECTERS



- Strong concern that things are opening up too soon
- Chose to stay at home
- Vocally criticise those going out into public spaces – as socially irresponsible, putting others at risk

THE ANXIOUS DILEMMAED



- Want to regain social life e.g. social interactions and activities, but anxious about virus exposure
- This creates an internal conflict & dilemma
- Also concern that friends will view them as anti-social

THE CAUTIOUS OPTIMISTS



- Eager to venture out, start getting back to normal life, and leisure activities
- But aware that this needs to be done cautiously
- They are in control e.g. closely monitoring and following of rules / protocols

THE EXCITED ENTHUSIASTS



- Excited to enjoy all they feel they missed out on during PSBB, particularly social gathering
- Less real fear exhibited e.g.
 - Many proudly sharing activities on social media
 - Hanging out with less emphasis on following protocols

1. FOOD & BEVERAGE: It's not about the food itself, but more about hanging out and interacting with others

As new normal commences people are rushing to go outside, and less excited about home cooking & baking

- **Food and beverage as the medium for social engagement**
 - Excitement about catching up over food and coffee - Indonesians craved for "real" (in-person) social interaction with others
 - With easing of PSBB, food and coffee with friends is the medium that provide them with a taste of freedom from social restrictions
 - Terms such as *'freedom'* and *'real human interaction'* are commonly used in the the context of discussions about New Normal
- **Less excitement for in-home activities (home cooking & baking)**

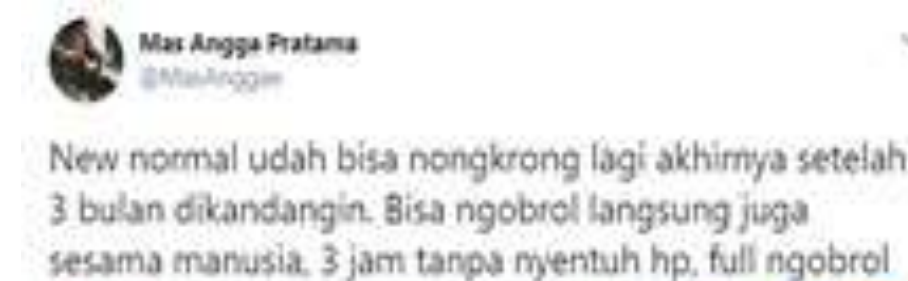
Getting creative with food at home is less in the spotlight
- However, the excitement over eating out is the source of anger among Angry Rejecters and Anxious Dilemmaed who still very concerned and cynical about eating out together in groups
 - Example of term used - *'virus in the middle of the crowd'*



"First coffee hangout in the new normal era."



"After new normal, people are starting to update their social media with photos of them going to café and other hits hang out spot. How could they look happy to go out while there's still virus in the middle of the crowd"

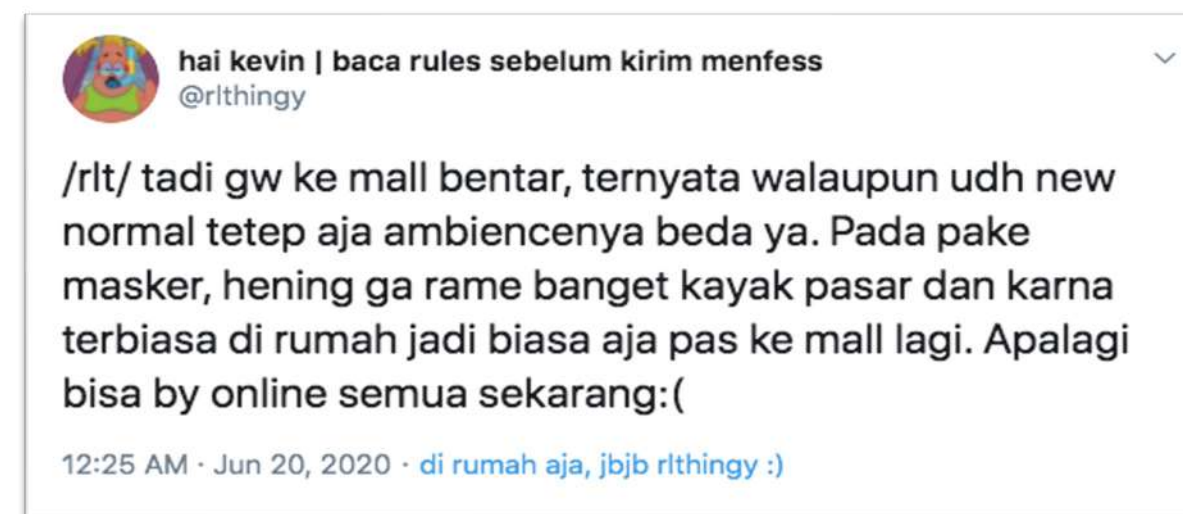


"After being 'caged' for three months, now I can hang out again with real human. Three hours of catching up 8 without playing with our gadgets."

2. SHOPPING: The experience of shopping and going to malls are now reconfigured based on new health protocols

Malls continue to be an important part of urban Indonesian lifestyles, however reactions about going to the malls in the context of New Normal varies

- **Excitement to visit malls again and feel a new ambience:** With fewer people in malls and health protocols in place, some Indonesians feel the shopping experience will no longer be the same.
- **New fashion statements emerging:** Some consumers are rethinking their style & how they dress
 - E.g. face masks as a fashion symbol matching clothes (as well as health protection and social responsibility)
 - E.g. celebrities promoting face shield use
- **Less discussion about online shopping** due to renewed access to malls
 - But some Angry Rejecters and Anxious Dilemmas advocate for people to continue shopping online, rather than in person - *"Just shop online!"*



"It's so quiet" – The experience of being in a mall is not crowded like it used to be



Actress Ingrid Kansil - Importance to "follow the protocols" when visiting malls. She wears a face shield, which is also becoming a new fashion accessory for some consumers



"They need to match" – Matching face masks with everyday outfits is becoming a new trend for consumers when they go out

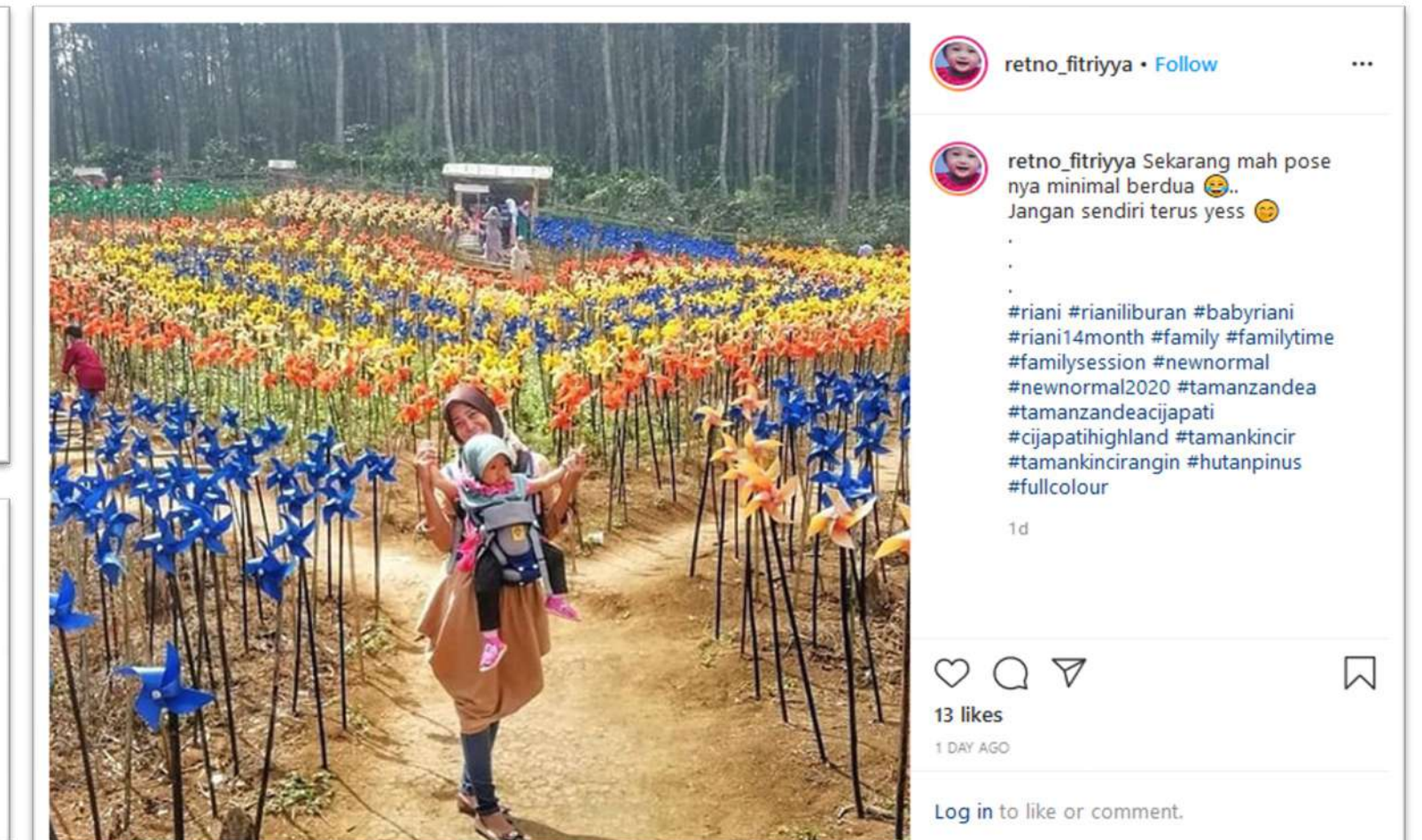


"Just shop online" – Some consumers feel that being in a 'new normal' doesn't necessarily mean that you need to go out as you please; especially when you can still purchase things online

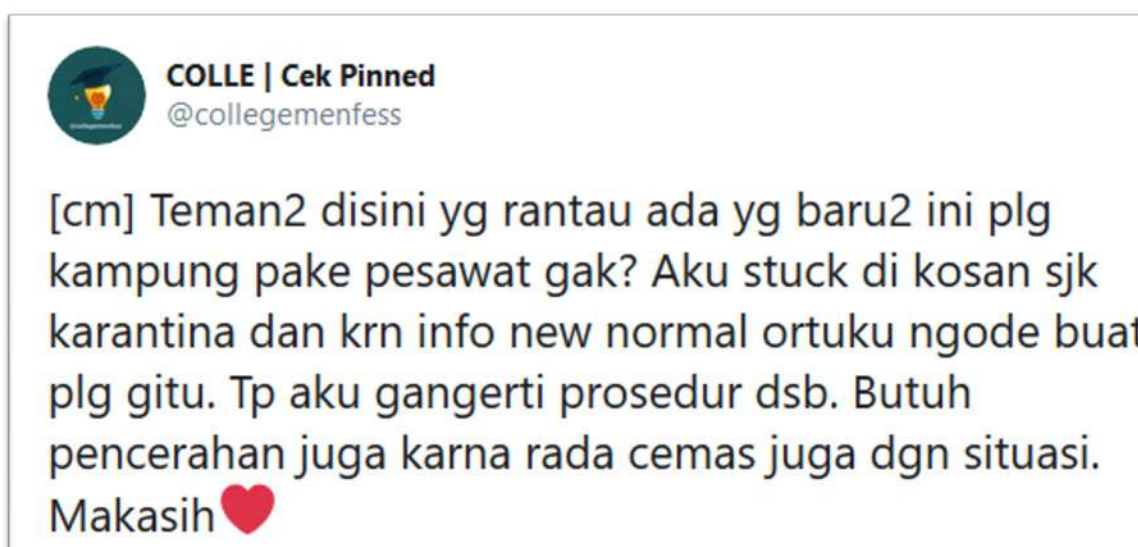
3. TRAVEL & TOURISM – Excitement about visiting tourist sites, although still limited to local sites

Consumers seek quick escape as soon as movement restrictions and social distancing rules are eased.

- **There is much confusion around the new normal with travel**
 - Lack of clarity of New Normal protocols e.g. procedures for traveling on planes and trains etc
- **Euphoric sense of freedom** – while the new normal protocols related to travel and tourism are not clear, travel provides a gateway for the consumers to release their stress
 - With restrictions on overseas travel still applies, people are focussing on discovering local tourist offerings
 - Language used - Indonesians refer to being *'jailed at home'*
- But the Anxious Dilemmaed feel that opening leisure sector should be the last action



“Like getting out of jail” – people posted their “new normal” photos in social media



Confusion over how to travel during the new normal



“Other countries might impose travel ban on us” – frustration about how relaxed the enforcement of health protocol for traveling in Indonesia

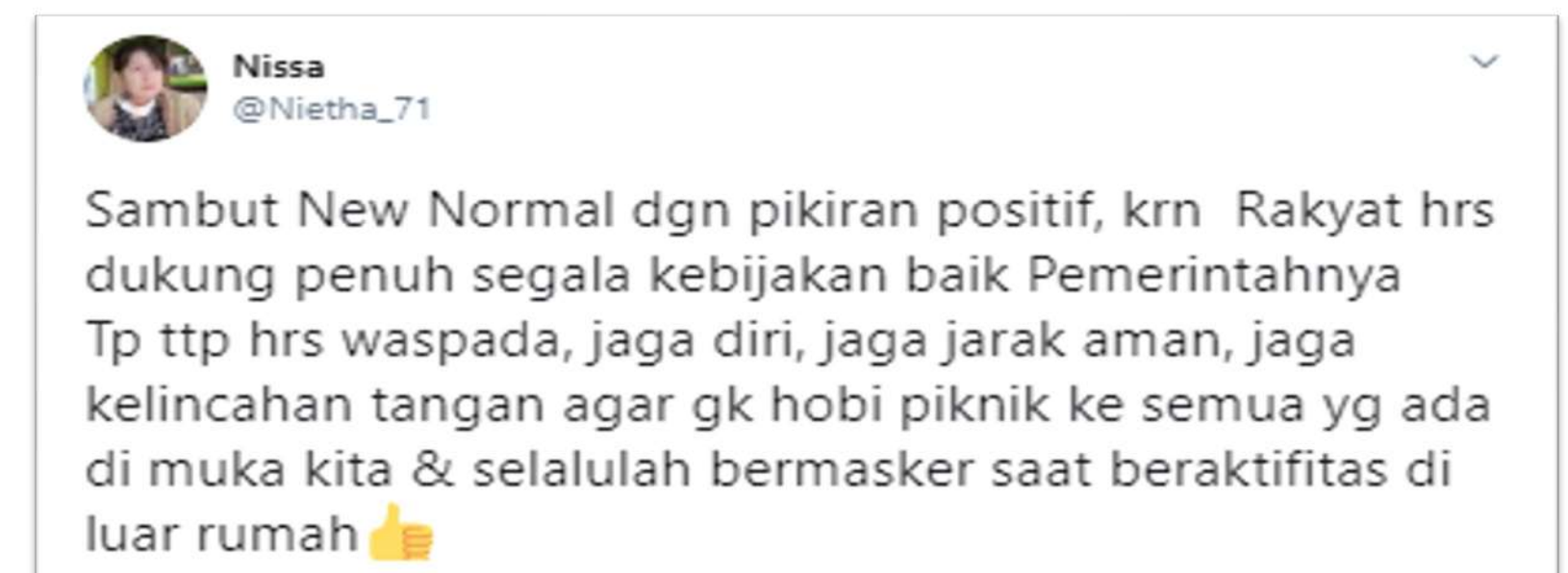
4. HEALTH – Responsibility at a societal level to follow protocols imposed by health authorities

It is not about personal health but also about the general health and well-being of the society; at varying levels of adherence

- **Many Indonesians feel a dilemma about the relaxing of social restrictions** - While wanting to support the economy, and to have people working, there are those who are concerned about lack of social distancing and about the spreading of virus.
- **Visible cues indicate levels of concern for health and social responsibility**
 - E.g. the use of Masks and the practice of social distancing are easily recognisable visible cues
 - E.g. the re-emergence of bicycling is also another way to visually express the sense of responsibility by avoiding public transportation.
 - Language cues include “*positive mindset*”, and ‘*remaining vigilant*’
- **However, for the more anxious, there is concern that the ‘new normal’ will become back to ‘old normal’**
 - Concerns that some people are still ignorant and go back to their old ways (not follow new health / hygiene protocols) after government has eased restrictions



To respond the policy that allows online ojek ride for passengers, consumers planned to bring their own helmet & hand sanitizer



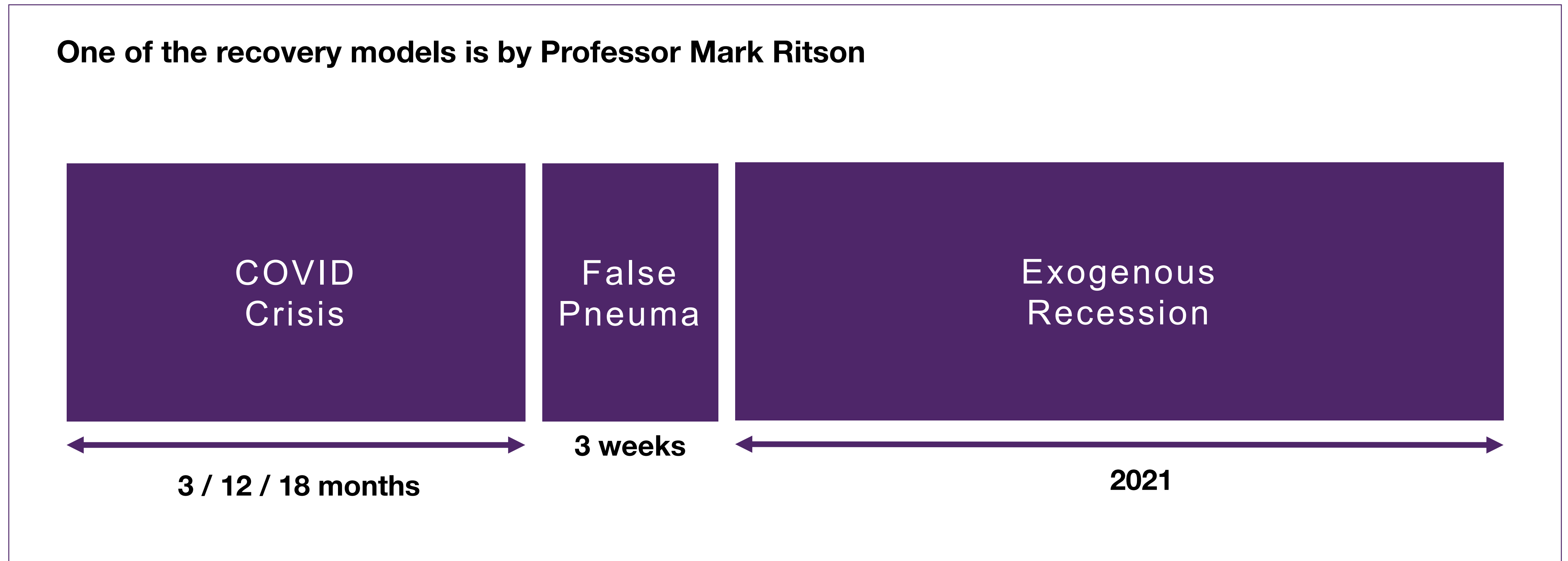
“Let’s welcome New Normal with a positive mind” - Support the government while remaining vigilant with social distancing, protection & personal hygiene



Conclusion

Entering the Post-PSBB Stage – Euphoria emerges

Indonesians currently have a desire to make up for lost time & experiences during PSBB – to enjoy all they missed out on



<https://weareroast.com/news/ritson-on-coronavirus-key-insights-from-the-marketing-week-webinar/>

But it won't last long - the large global recession is predicted to arrive and habits may change again

Lesson for brands



Keep On Listening

Consumer sentiments changed quickly in this New Normal. Brands need to anticipate by keep on monitoring the changes in consumer and culture.



Be Mindful about Your Message

Brands need to be more sensitive about consumer sentiments in New Normal. They need to thread their message carefully as not to offend consumers.



Prepare for the Next Stage

New Normal euphoria will not last too long as the world will be heading into recession. Brands need to learn from past recession to anticipate another behavioural change.

THANK YOU!

See you in the next Webinar!

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**

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