

# Embracing The Un-normal

**Webinar 6:**  
*Evolving Indonesian Sentiment:  
Helping Consumers Navigate the  
Ongoing Changes*

**27 August 2020**



# illuminate

Strategic Insights Consultancy

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# 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 continued to do our own research:

- We joined a global collaborative initiative called “Not Everyday Life”, an ongoing initiative.
  - Across more than 45 countries; with more than 350 conversations conducted
  - Phase 1 – Conducted in March – April 2020. We shared some of the findings of phase 1 in our first webinar in early May
  - Phase 2 – conducted in June-July 2020, around the time of the easing of social distancing restrictions. We conducted interviews across Indonesia, Malaysia, New Zealand and Australia.
- Ongoing cultural analysis and qualitative studies from June-August 2020



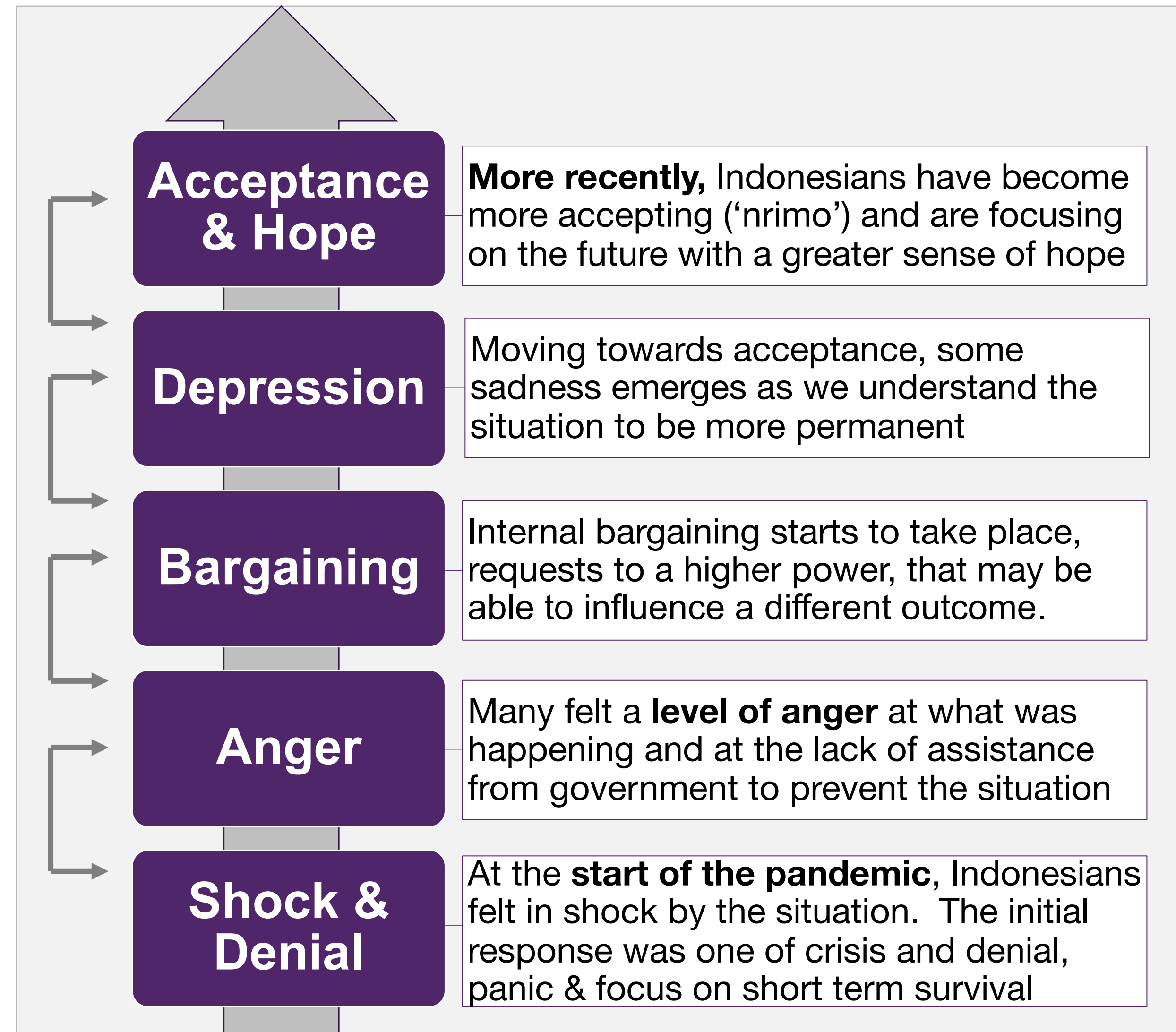
**Will share what's how things have progressed for Indonesian consumers in the last 3 months**

# We have all been progressing through various stages of emotions while the pandemic crisis has progressed

Given the somewhat traumatic events of recent months and a loss of normal life, the progression of emotions can be reminiscent of the 5 stages of Grief & Loss theory

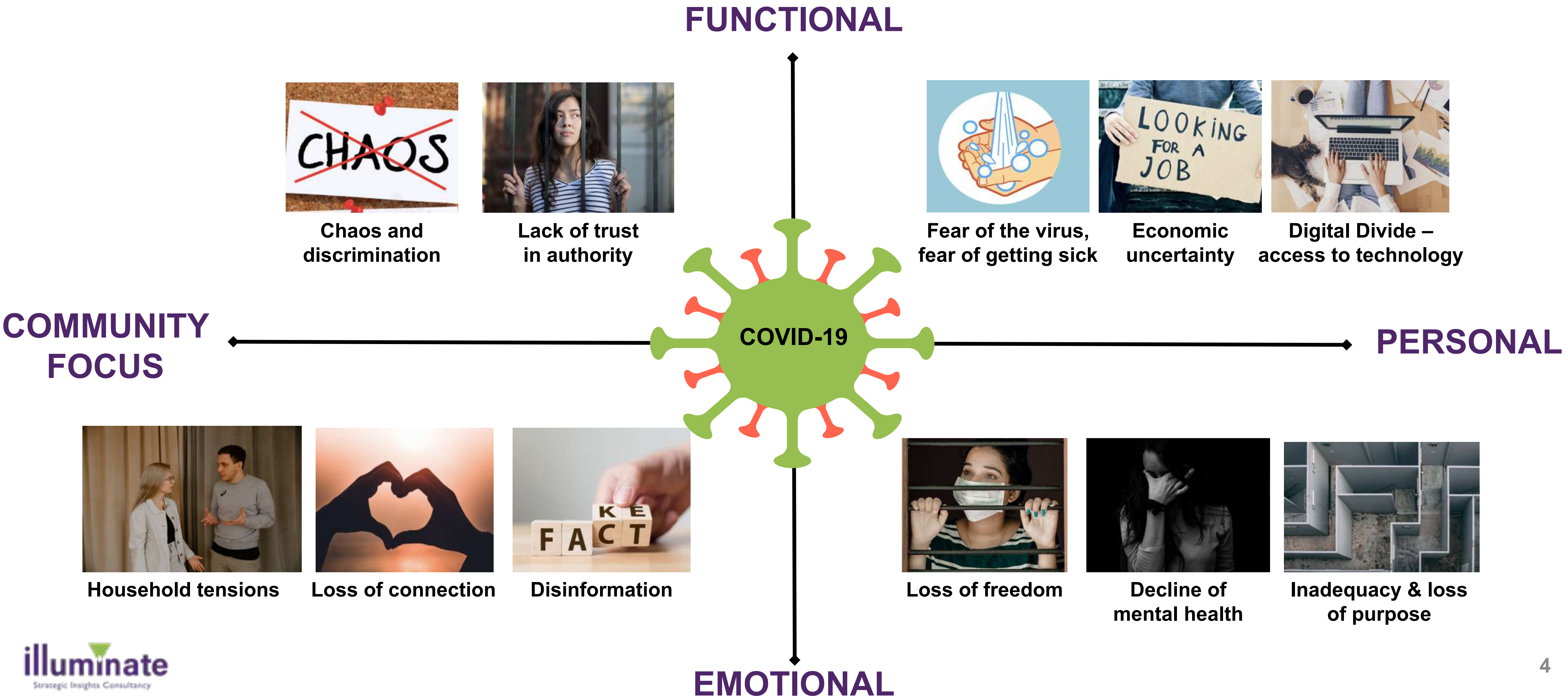
The theory, originally developed by psychiatrist Elisabeth Kubler-Ross, suggests that humans go through five distinct stages of grief after a loss

- And it is common for people to switch back & forward between different stages (its not necessarily linear)



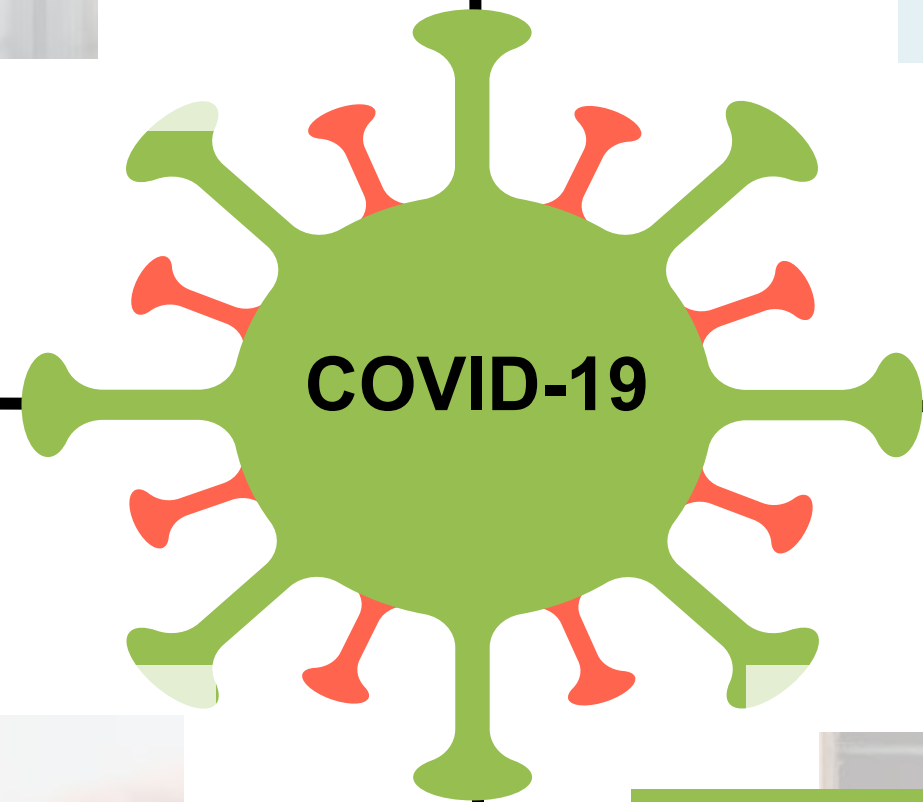
# Recap – Where were we when we first touched base in early May?

We saw many Indonesians with fears, anxieties and many very concerned on how it may impact the country in the long term – they often feel out of control of the current situation



# Recap – We saw Indonesians were resilient and had started to develop new ways of coping

FUNCTIONAL



COMMUNITY FOCUS

PERSONAL



EMOTIONAL

# So how have things progressed?... Where are Indonesians in their journey through this Covid Landscape?

The Impact of PSBB Social Restrictions is highly dependent on social class – with higher social class having less overall impact

## UPPER CLASS

(Generally less impacted)

- E.g. White collar worker (corporate finance), college students etc
- More likely to be able to work from home - less affected financially
- Have access to own transport (not use public transport use) - more freedoms



## LOWER CLASS

(More greatly impacted)

- E.g. Daily wage earner, massage therapist
- Unable to work from home; so many have had a big impact on income
- Need to use public transport, so that they are more exposed to risks generally



# Reaction to government's actions to pandemic are mixed

A real mix of sentiments depending on the level of engagement in local and global current affairs and news



## MORE NEGATIVE TOWARDS GOVERNMENT ACTION

- Tend to be more engaged; follow the news closely
- Feel the government has dropped the ball and should do more to educate (many don't follow the protocols)
- Very skeptical of the government's ability and actions to handle the pandemic. Compare more to other countries, and feel Indonesia has not performed as well



## MORE POSITIVE TOWARD GOVERNMENT ACTIONS

- Tend to have lower engagement overall, less closely follow the news and current affairs
- More optimistic, feel that the government has done a decent job; less likely to compare against other countries.
- Assumes most people understand and follow protocols

*"Our society doesn't really care about health compared to Malaysia or Singapore who thinks that health is part of their primary needs. I think the government should support us especially people who work in service industry like hospitality, tourism, gym, education, etc. just like other countries so we have something to survive."*

# We see a wide range of how behaviours emerging in how Indonesians are responding to the eased restrictions

How they are personally affected and react varies from overwhelmingly fearful to more optimistic

## HIGHLY FEARFUL



- More to higher social class
- More opposed to easing of restrictions:
  - Lack of education on protocols
  - Feel that not everyone in society understands (or cares)
- Concern of opening up too soon, and government not careful enough – continuing to see cases rise
- Highly frustrated at current situation, look to protect themselves and their families at all cost

## THE CAUTIOUS CO-EXISTERS



- Slight skew to middle to upper social class
- Tend to be less stressed or afraid of the situation overall; feel that relaxation of PSBB is good for the economy
- Recognize the need to balance health & economy
- They are being sensible - taking the necessary precautions..
- ... but hey are more relaxed in their outlook; as if the immediate overwhelming threat has eased.

## RELIEVED OPTIMISTS

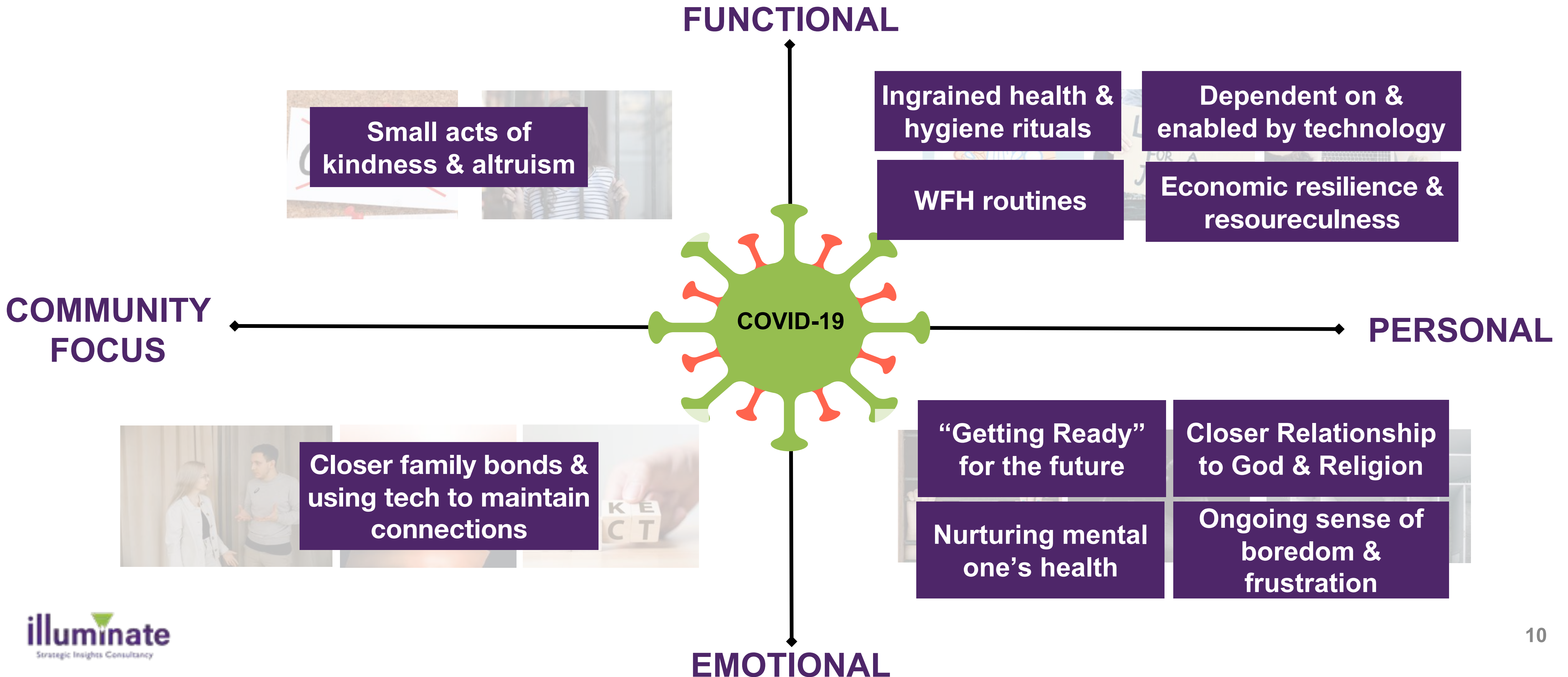


- More to lower social class
- Overwhelming relief that businesses are reopening, can return to work or get a job
- Optimistic that hoping that financial will recovery soon occur
- Happy that public spaces are opening and can go back and enjoy them – back to normal routine



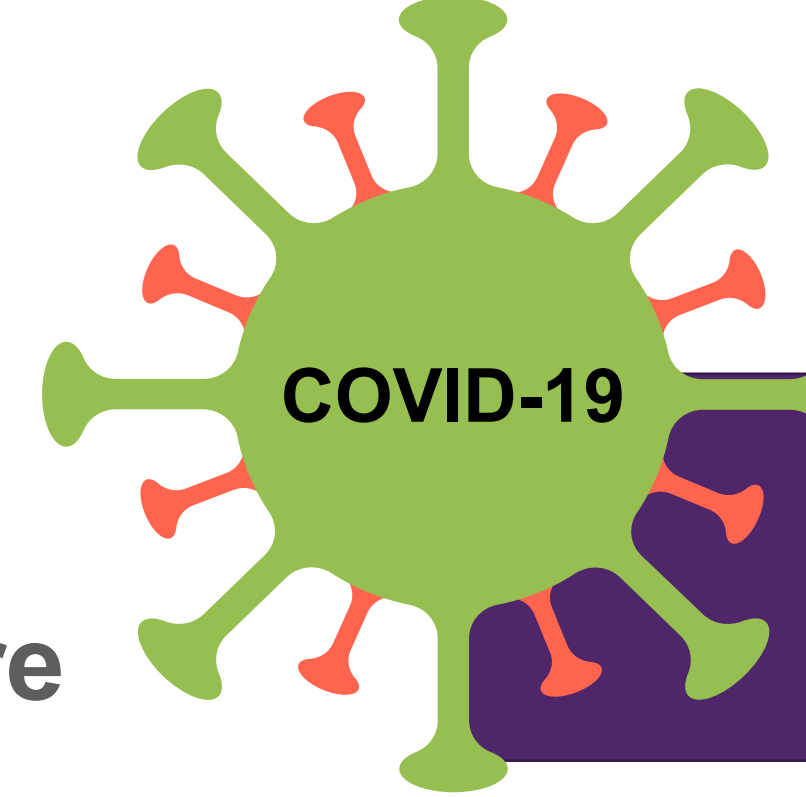
# Several months into the crisis, we see that Indonesians have really progressed in terms of how they cope

Even though the pandemic has not drastically improved, Indonesians are resilient and adopting new lifestyles and behaviours and finding new ways to cope and be optimistic



# Realigning to the positive, getting ready for the future

As we have seen from the start, uncertainty and social isolation has strongly impacted mental health; but now Indonesians are starting pivoting to the future



**Many claim to still feel bored, worried or anxious, this has been a time to refocus**

- Self reflection and re-evaluation of life's goals and priorities
- Uptake of new hobbies (or re-discovering old hobbies)
- Using the time to be healthier, watching their diet and more exercise

**Reigniting and pivoting skills**

- Retraining, reorganising skill sets in order to follow a new path or to progress in one's career
- Starting a new business venture e.g. online clothing store

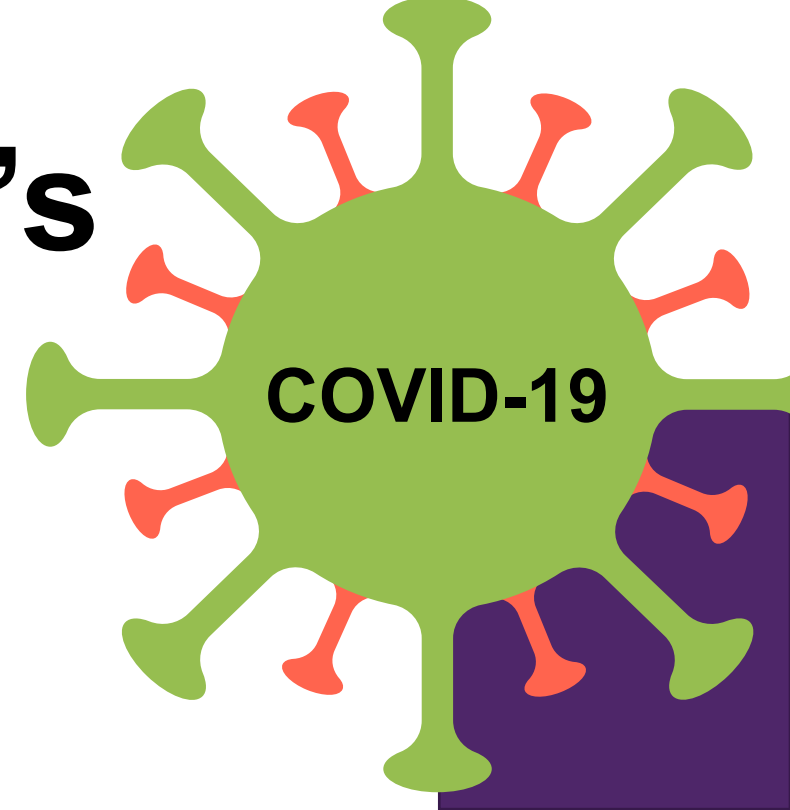
*“What I miss the most is to be able to go out and enjoy my time with friends or just me-time. It's quite stressful to not be able to go out”*

*“I have more time for contemplating. I keep on asking myself, 'Will I be a better person after the coronavirus is over'? Or will I remain the same person?' I wish I could be a better and produce good work”*

*“I started to make content for my Youtube channel again. But instead of travel content, I start reviewing Korean Drama and Netflix Series. By creating videos, I can also train my public speaking skills.”*

# While Indonesians are entering a stage of acceptance, there's still an ongoing sense of boredom & frustration for many...

So the need to nurture mental health and turn to religion continues



## Ongoing sense of boredom & frustration

- Many still feel cooped up at home and look for ways to relieve boredom
- Continuing to nurture one's mental health is critical

*"At some point I feel bored to stay at home and my routines seem to be very repetitive"*



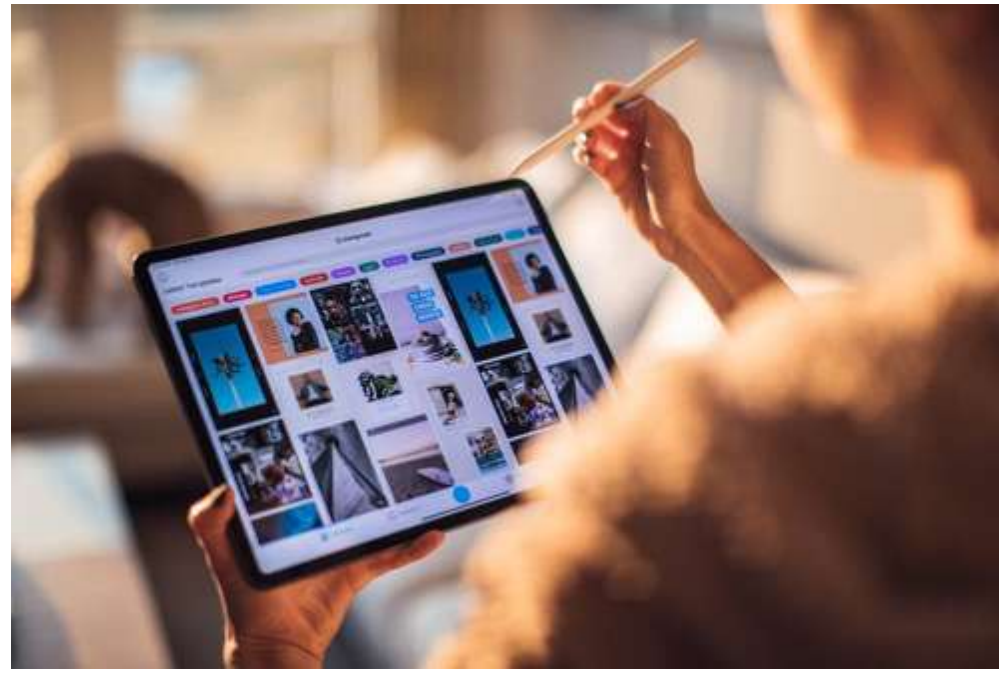
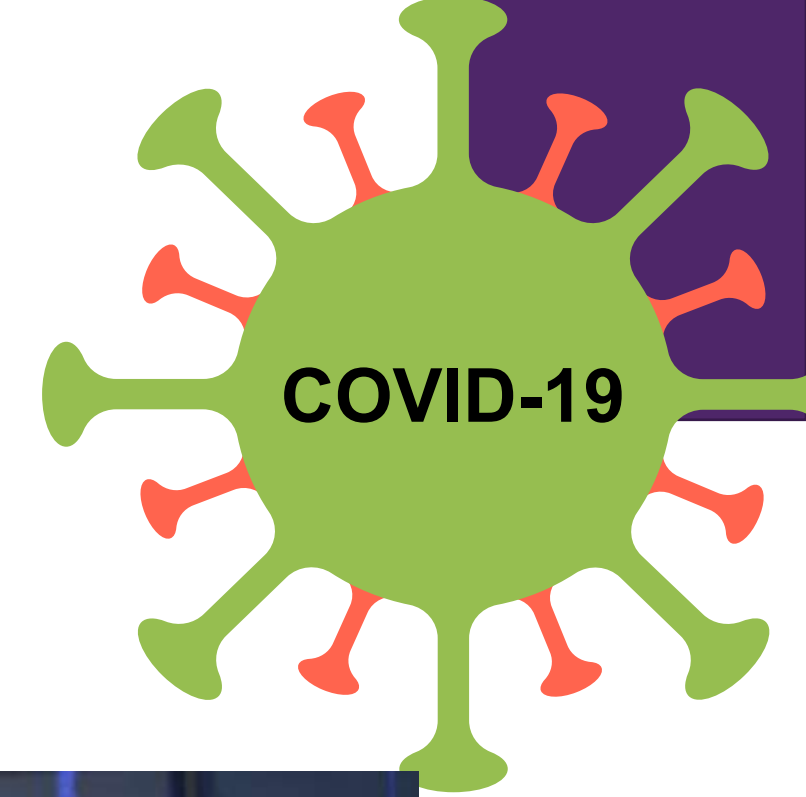
## Closer Relationship to God & Religion

- The lockdown has allowed many to focus more on religious practices - Religion has helped Indonesians maintain optimism
- Especially lower social class, some feel that seeking for God's protection & prayer is enough to protect them from the virus

*"Now, instead of being afraid, I just prefer to get closer to God. The virus is also God's creature, so by praying and keep trying I'm sure that I can avoid getting infected."*

# Functional aspects of the new way of life have become more routine for most Indonesians

We have seen economic resilience, ingrained health rituals and normalisation of WFH



## Economic resilience & resourcefulness

- More resourceful & creative; look for other source of income e.g. food
- Feel less helpless, more optimistic to create opportunities
- Selective spending on 'essentials' (includes snacks & comfort foods)

*"Now, we are planning to have our own clothing line business. Because we have more time, so we can focus thinking of this. It's about to happening."*



## Enhanced health & hygiene rituals become ingrained

- A wider range of regular hygiene habits & rituals
- Accepted as a normal part of life now – no longer an inconvenience
- However, accessing some health services has become more difficult

*"Corona makes my family more aware of cleanliness and hygiene. We wash hand more often & clean our body more thoroughly. At first, it was inconvenient, but now, we feel more accustomed to it"*

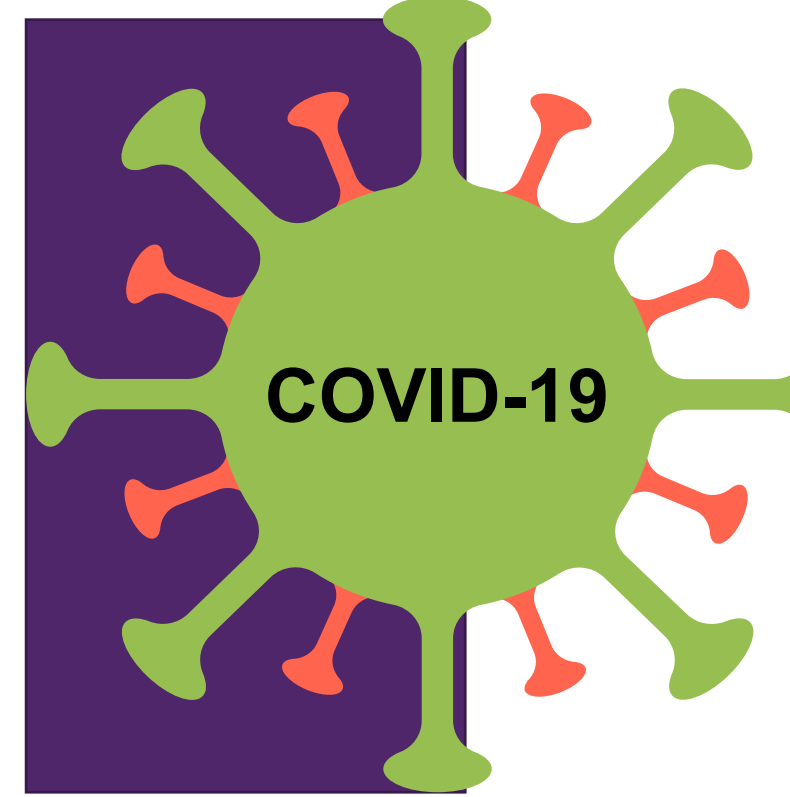


## Normalisation of WFH Routines

- Consumers become more accustomed to remote working
  - Some - more productive, less distractions; more time (no commute)
- But many students struggle with remote working, especially those with practical study components

*"I feel more productive now during the pandemic.... time and energy saved without the need for travel"*

# Maintaining interaction with and support for others in the community continues as a priority



## Closer family bonds and more time with loved ones is appreciated and cherished

- Leads to greater understanding and closeness – seen as a positive from a difficult situation
- The importance to maintain social connections, especially with extended family and friends – embracing technology as a way to do this

## Small acts of kindness & altruism continue

- As we have seen since the start, people continue to be more kind to others; doing small acts of kindness:
  - Giving bigger tips to delivery drivers and sharing food,
  - Allowing instalment payments for goods and services (even, for example, house rent).

*“I mean, we should always think positively. We can get more time with family, eating healthier. That’s what we should always be thankful for.”*



# There are new ways to Celebrate milestones & everyday events alike

Learning to live with the pandemic, not putting life on hold



## Creative news ways to celebrate & socialise:

- **Birthdays:** face to face with family but extending the party through Zoom. Gifts & cake sent via online
- **Weddings:** Smaller groups but broadcast & receptions through Zoom. Drive through wedding trend emerges
- **Youth** start to socialize again, play only games together ('mabar') but outside house

*“My brother postponed the wedding but because things are so uncertain, my family decided to proceed. There was no reception at all, we just had to go to the government office, and the core families gathered at my house. The couple can use their money to buy furniture for their apartment”*

*“It feels so different on Lebaran day. We didn't visit the family or relatives. Yes, we used Zoom, but it doesn't feel the same. We need to take turn and wait for our turn to speak. We pray at home. This is totally new for us. It didn't feel like Lebaran”*

## Ramadan and led Fitri celebrations subdued

- Breaking fast and Eid celebrations through Zoom, and Tarawih prayer was done at home.
- Online food services saw an increase as well with people sending hampers as a well-wishing
- People still cooked Eid food (e.g. opor, ketupat, etc.) to retain some sense of normality



# With none of us knowing how long this will last, we are in a period of 'wait and see'

Given this, some are impatient, desperate to try resume life as they remember it, as soon as possible. Therefore, many find inventive short cuts, or bending rules

- **In this desire to return to normal, we see some Indonesians taking more blatant risks and short cuts**
  - Indonesians are very sociable, so find new ways to do this now / doing in different ways
  - For example:
    - Celebrating Eid with neighbours and in the mosque without social distancing
    - Surprise birthday parties in person
  - Handwashing as the main way to try to protect oneself



*"I did my Idul Fitri prayer in musholla with my neighbours, without any physical distancing. The musholla was full ... After praying, we shake hands with each other to ask for forgiveness. I was actually scared, but I feel bad if I didn't join. After that, I washed my hands immediately."*

# With so much still uncertain, we see a mix of optimistic and pessimistic views of what will happen in next 6-12 months

Much is unknown about what will really happen, and much depends on Government



## Overwhelmingly pessimistic

- Really not sure what will come next
- Critical of the government's handling of the crisis – feel the prioritising of economy over health is detrimental
- Expect things to remain bad or get worse

*"I assume this would last longer than people thought. Because our people prefer to work to get money. The government needs to support and educate us more."*

## Continue as current situation

- The current level of restrictions will continue – and people will adjust into this new way of life
- The eased restrictions allows more choices and enables the economy to progress

*"I think things won't change that much from now.... In the beginning, things were really uncertain. For now, even though the government aren't giving us solutions, at least people are given the choice to live their lives, especially for those SMEs"*

## A return to normal

- Almost blindly optimistic
- Expect a treatment or vaccine will bring an end to restrictions
- Eager to socialise again, and visit favourite hangout spots

*"I think in the next 6 months, the situation would get better. I think we would have medicine or vaccine. People are now more aware of the hygiene and social distancing, but still need support from the government"*

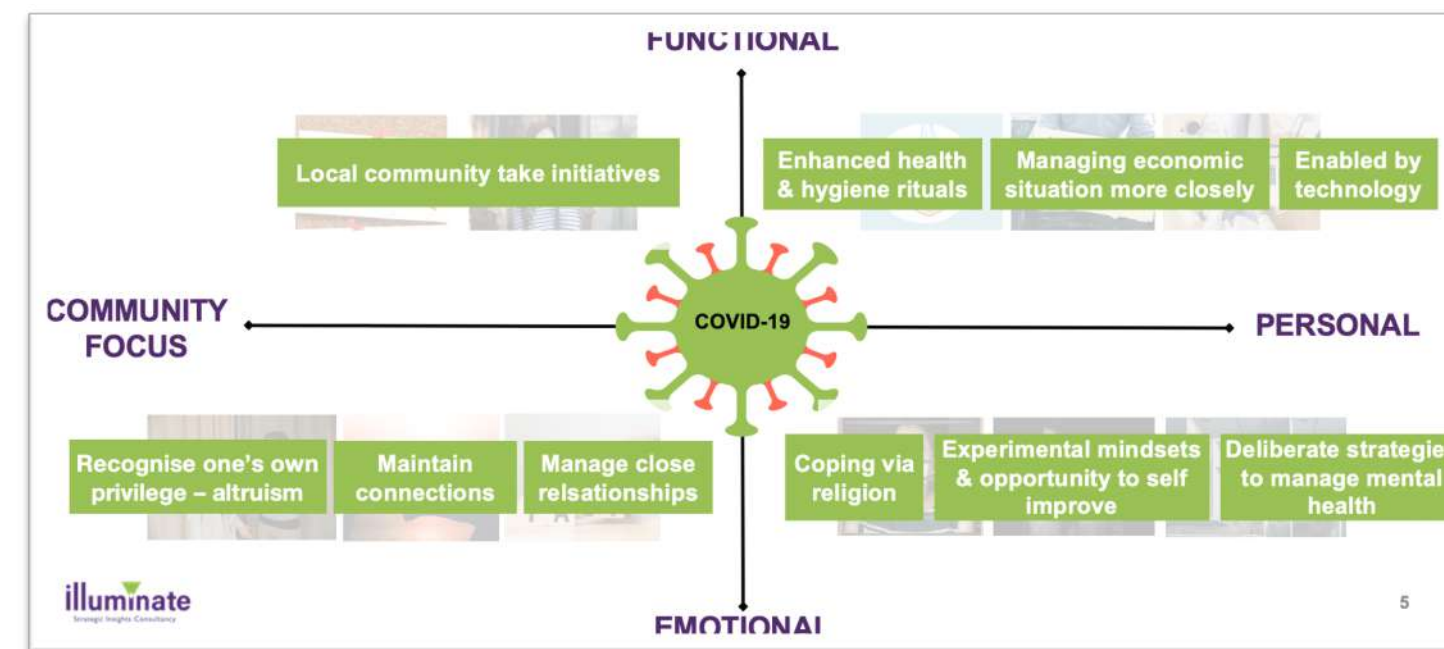
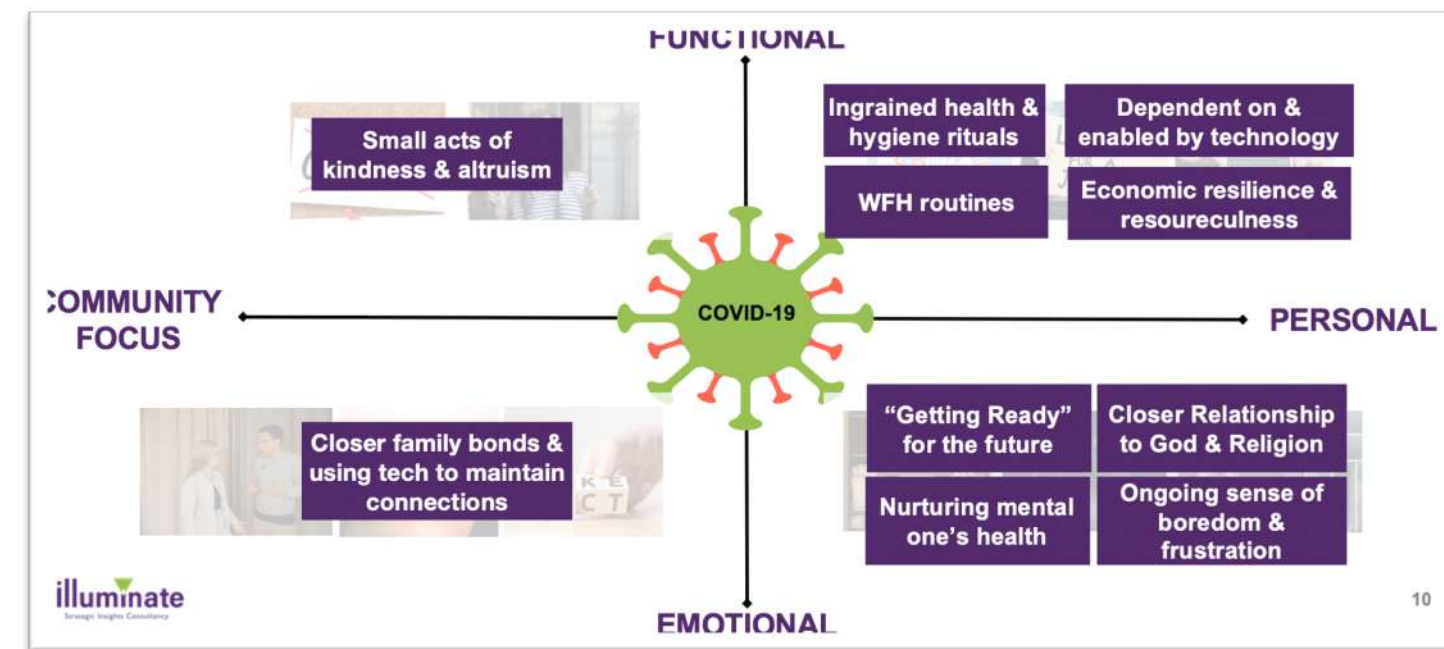
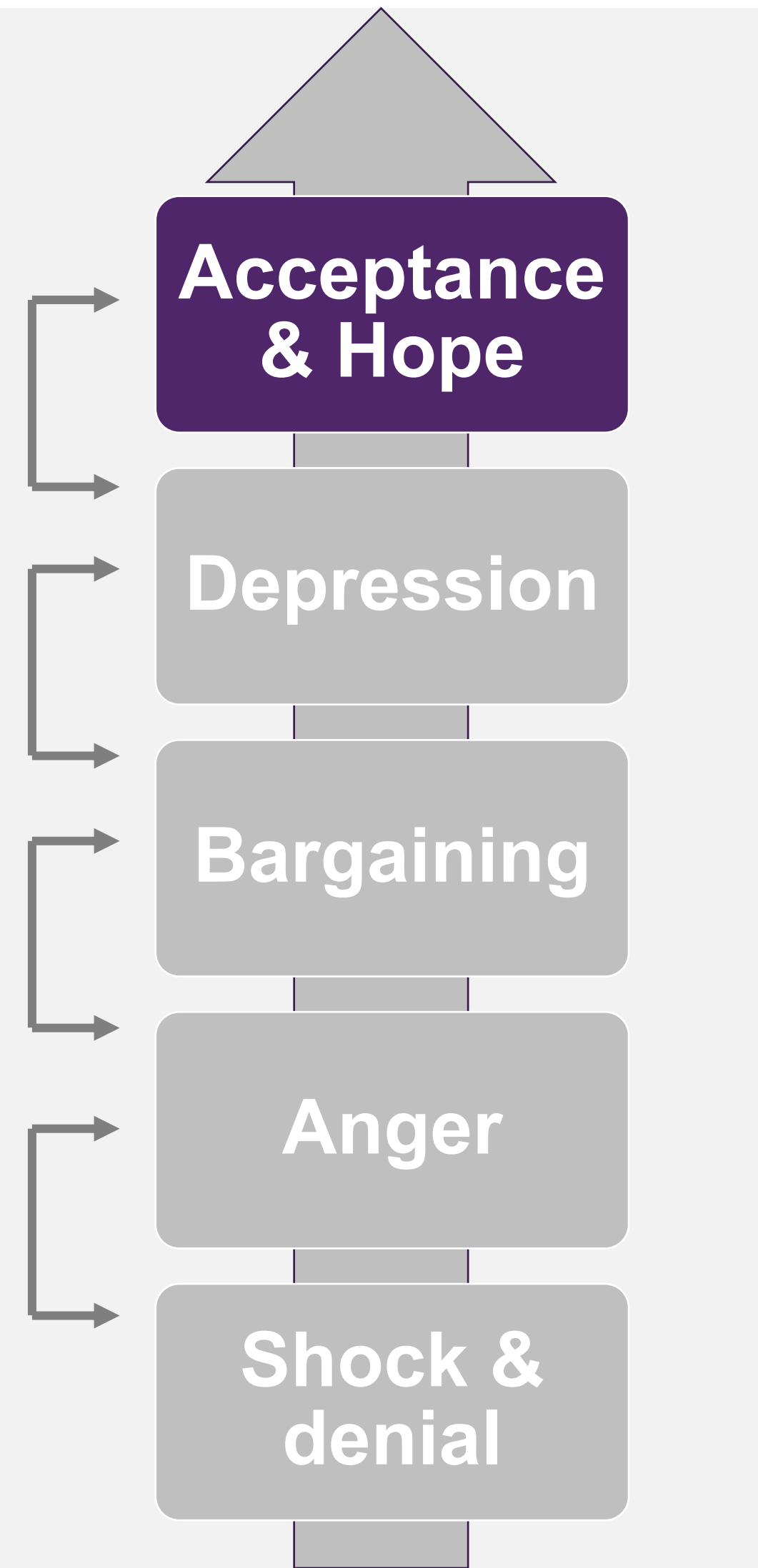




# **Conclusion – What does this all mean for brands?**

# It is evident that for the most part Indonesians have progressed to a mindset of Acceptance of the situation and are looking towards the future

They have progressed through the stages of shock/denial, anger, bargaining and depression

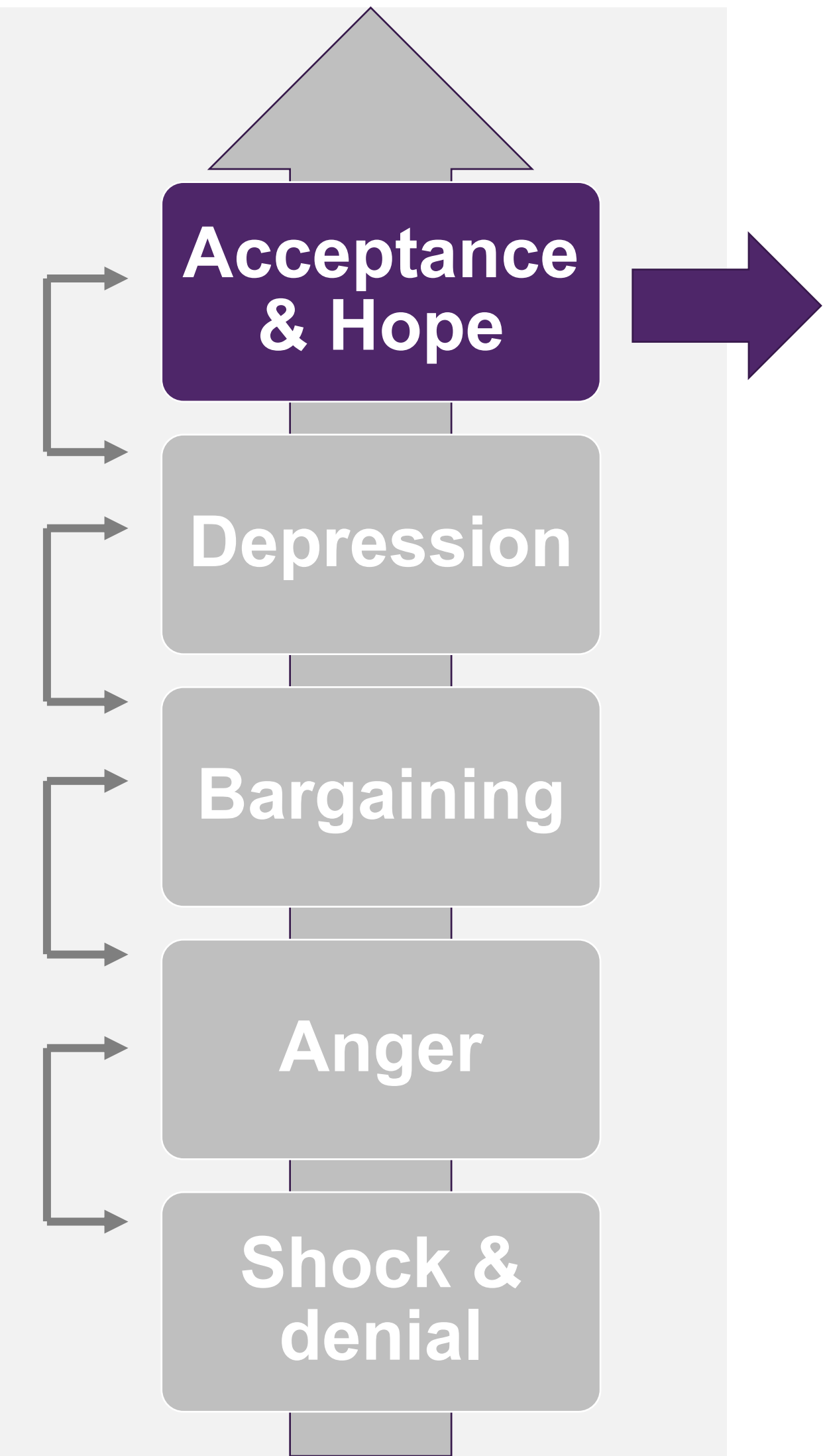


## FROM (Start of pandemic: April/May)

## TO (State of play now: August)

Technological divide – less tech savvy, need to upskill	➔	Dependent on & enabled by tech – has become a 2 <sup>nd</sup> nature part of life
Emergency assistance & altruism to help those less fortunate	➔	Small acts of kindness and altruism
Struggling to get used to more health & hygiene rituals	➔	Ingrained health & hygiene rituals
Close management of economic situation – causing grave concern	➔	Economic still concerning, but more resilience & resourcefulness
Coping with religion	➔	Closer relationship with god & religion
Struggling to adjust to day to day routines	➔	More established WFH routines – found their flow
Deliberate strategies to manage mental health – salient topic	➔	Nurturing mental health still important
Experimental mindsets & opportunity for self improvements	➔	Getting ready for the future, repivoting
Manage close relationships (24/7) & maintaining connections	➔	Closer family bonds, maintain connections & rituals using tech

**Given this, brands should bring a more positive narrative as people have already passed the stage of Anger and Depression, into Acceptance & Hope**



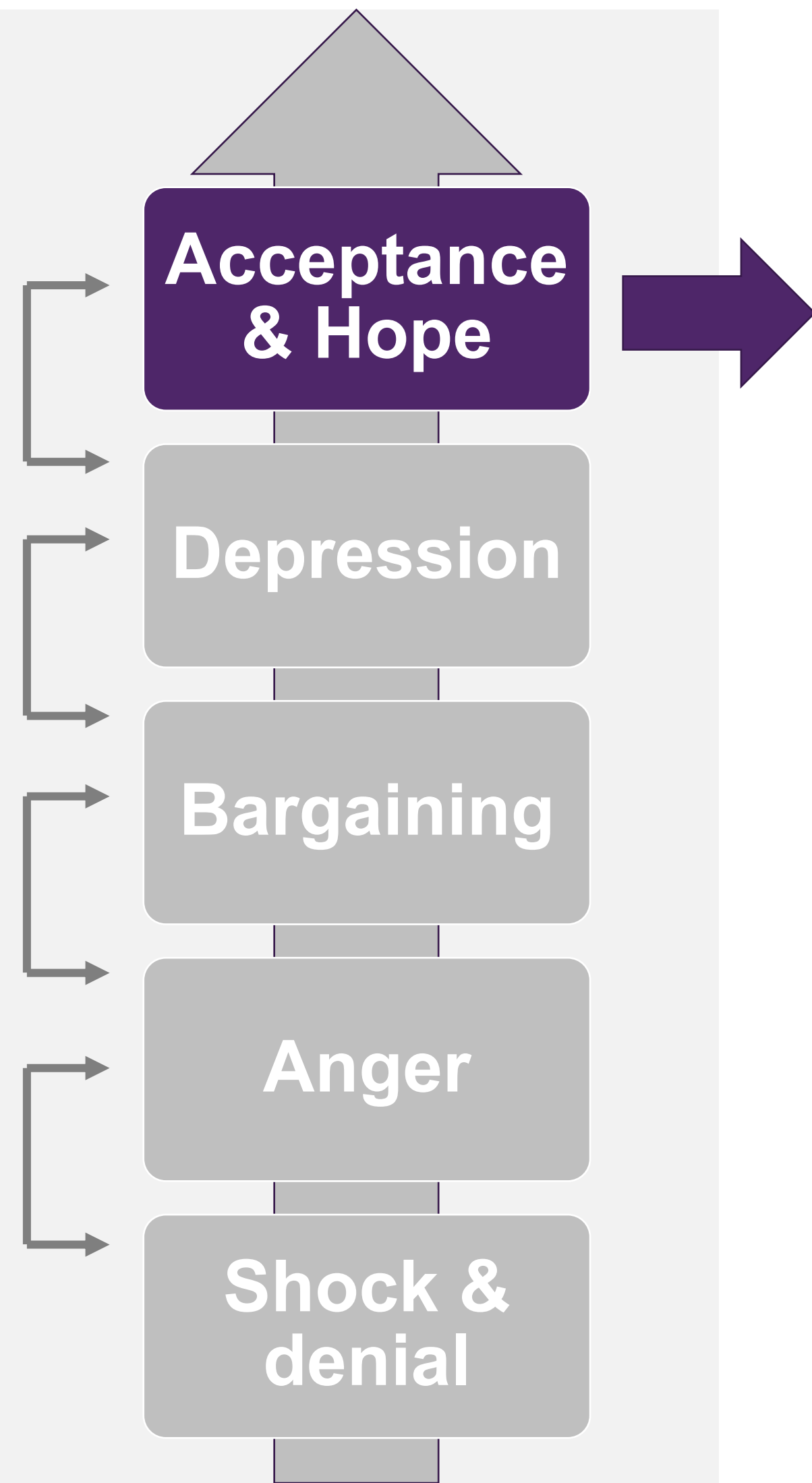
**1**

**Comfort seeking & escapism dominates**

**2**

**'Show must go on' mindset  
– Not willing to put life on hold any longer**

# Given this, brands should bring a more positive narrative as people have already passed the stage of Anger and Depression, into Acceptance & Hope



1

## Comfort seeking & escapism dominates

- It is important to accept that there are still frustrations and uncertainties which cause anxiety:
  - **The endless waiting** – uncertainty in what will happen and how long this will go on for, how long we have to wait
  - **Uncertainty** on how the outcome of the situation
- Consumers still need to **allow themselves moments of comfort seeking and escapism behaviour** – E.g.: indulging in comfort foods (often purchased out of home), following hobbies, binge watching TV series, etc
- **Simulating normalness** helps to maintain hope, and help consumers to escape from reality

# 1. Comfort seeking & escapism dominates

Acknowledging the uncertainty of the unknown and 'endless waiting'



*Burger King Is Celebrating Christmas Early, Because Shouldn't 2020 Be Over Already?*



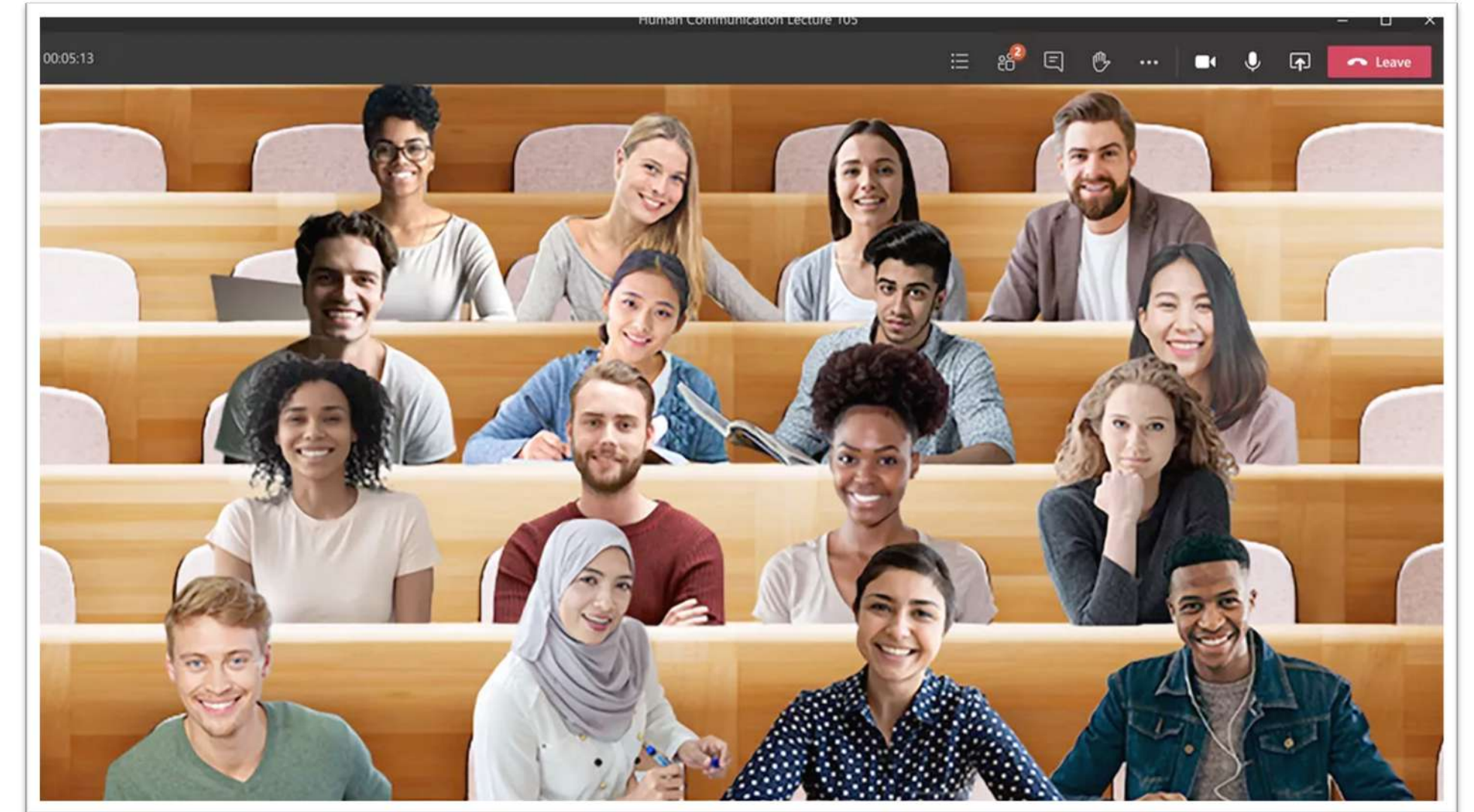
*Campaigns celebrating waiting – “The Art of Waiting” (Fairmont Hotels)*

- **Brands can acknowledge and empathise with the anxiety of the waiting**
  - Empathise with the frustration; show understanding of how keen people are for this to all be over
  - Use humour where possible
  - Try to help by make waiting bearable
  - Empathise that we are all in this together

# 1. Comfort seeking & escapism dominates

Allow for & help facilitate escapism

- This continues to be an area where brands can have an impact on mental health and wellbeing
- Brands have opportunity to uplift the mood and spirit.
- Use a positive narrative to help people accept, cope and escape.
- Help with simulation of reality (“simulacrum)



*Microsoft Team together mode*

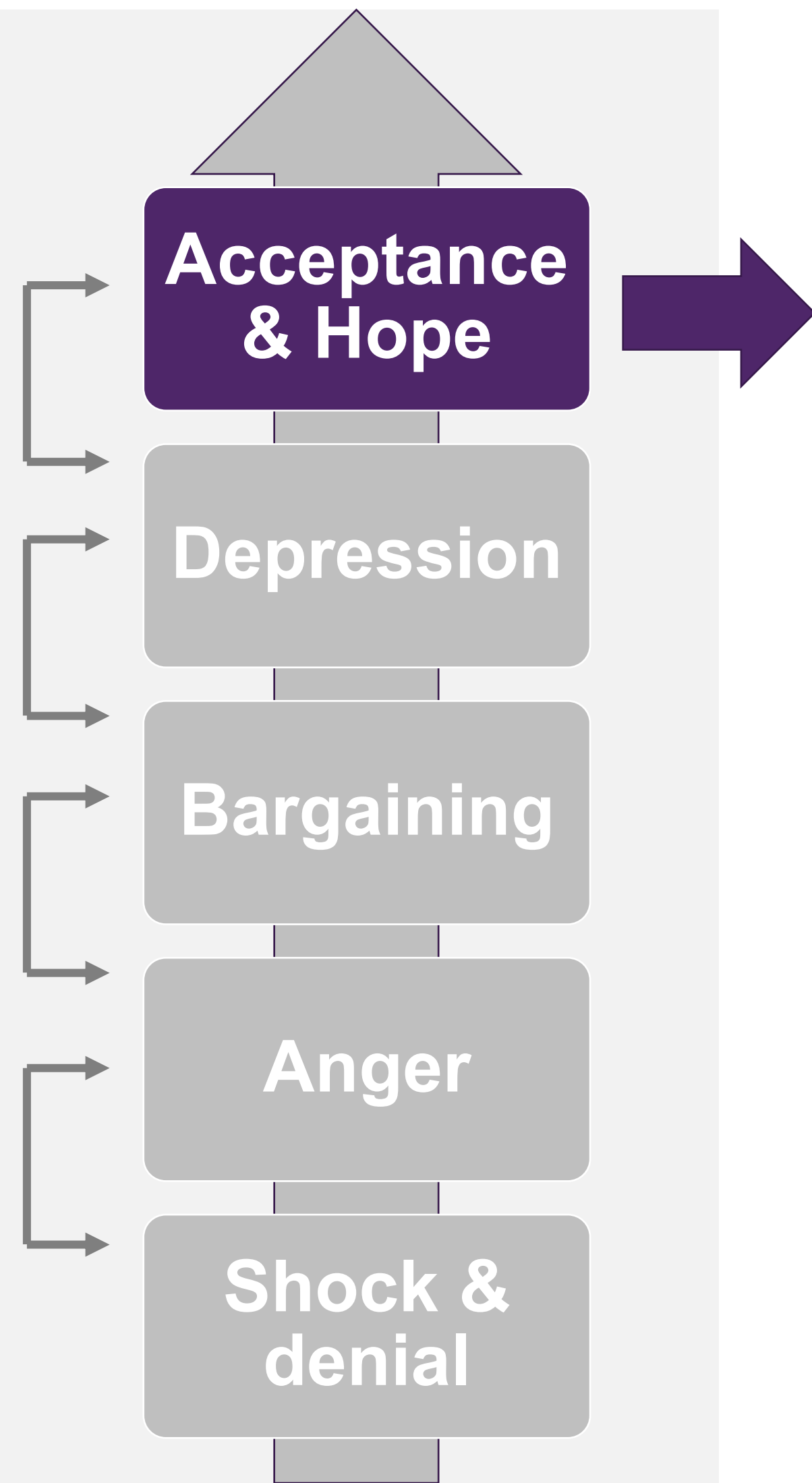
**FEATURED EVENT**

<p>AVAILABLE</p> <p>Aqsha Virtual Tour The Series – Perjalanan di Bumi Para Nabi (Episode 1) Rp40.000</p>	<p>AVAILABLE</p> <p>Travelai <b>Virtual Reality Tourism Series</b> Mesir - Palestina - Yordania <b>Perjalanan di Bumi Para Nabi</b> Dipandu oleh: <b>Dr. (Cand.)H. Masrura Ram Idjal</b> CEO Masrura Kendal Literary &amp; PP. ADITA</p> <p>1 Tiket All Series + Buku Rp. 150.000 1 Tiket 1 Series + Buku Rp. 80.000 1 Tiket 1 Series Rp. 40.000 Booking di @travelai.com</p> <p>Aqsha Virtual Tour The Series – Perjalanan di Bumi Para Nabi (Full Tour+Buku) Rp150.000</p>	<p>AVAILABLE</p> <p>Aqsha Virtual Tour The Series – Perjalanan di Bumi Para Nabi (Episode 3) Rp40.000</p>	<p>AVAILABLE</p> <p>Aqsha Virtual Tour The Series – Perjalanan di Bumi Para Nabi (Episode 2+Buku) Rp80.000</p>
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[LIHAT LAINNYA >](#)

*Virtual tour and travel*

# Given this, brands should bring a more positive narrative as people have already passed the stage of Anger and Depression, into Acceptance & Hope



2

**‘Show must go on’ mindset – Not willing to put life on hold any longer**

- Indonesians have established ways to cope with the situation of having less income, limited mobility, work/study from home
- They are no longer willing to just passively sit & wait, or tread water...
  - ...no longer putting everything on hold
- At the same time, there can be a feeling of ‘Covid fatigue’, they don’t want to be reminded of Covid 19 all the time
- Hence, people are looking towards:
  - **Getting on with the NOW** - There’s a real need to get on with day to day life, make the most of each day
  - **Looking to the future** and how to move forwards

# 2. Show must go on

How do you engage and communicate beyond Covid19

- Use optimistic tone in the communications is critical – back to business as usual but in safe way.
- Brands can continue the engagement as normal, but in slightly different ways e.g. interactive / virtual games
- Don't talk about Covid all the time or tone down the talk of it (but still show themselves as socially responsible brand)
  - Decrease the fear mongering. Find a way to reframe the narrative
  - Brands showing they can go on as normal, can be reassuring E.g. Uniqlo
- Brands need to be future facing, in encouraging and helping consumers move forwards



*Feature repivoting skills – online catering business*



*America's Got Talent – Virtual edition*



*Shopee "Box of Hope"*



# A few final thoughts....

A few things to remember.

- **Consider your audience:**
  - Experiences vary, and target audiences (by geography, demographics etc) may react to the situation very differently
- **Stay on top of relevant changes and trends:**
  - It's very important to understand how things are evolving for consumers in the months ahead, so that you can adapt your business and communications
  - Continue gathering insights, doing research, analysing cultural shifts
- **Embrace creativity and innovation:**
  - Be novel and try new things in order to stay relevant to consumers as the situation continues to evolve

# THANK YOU!

## See you in the next webinar, in September!

**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](http://www.illuminateasia.com)

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