

# *Indonesia Move On:* Indonesian Consumer Behavior Entering the New Normal Era

A study by KG Media



## CONFUSED FIRST, MOVE ON LATER

When the pandemic hit Indonesia for the first time, confusion engulfed the public. Various information about Covid-19 has sprung up in all Indonesian media and communication channels. The explosion of information does not necessarily create certainty. No one knows for sure which information is essential. Lies, misinformation, and truth, all mixed.

That was when at the beginning of the Covid-19 pandemic, KG Media published research entitled 'Indonesia Bingung' (Indonesia is Confused) which focused on changes in the behavior of Indonesian people when faced with a crisis called a pandemic. The change started with domestic affairs; the mother's role is very important because all activities are centered at home. Not only that, the economic difficulties caused by the pandemic have prompted many organizations, including brands, to encourage social movements to help people affected by Covid-19.

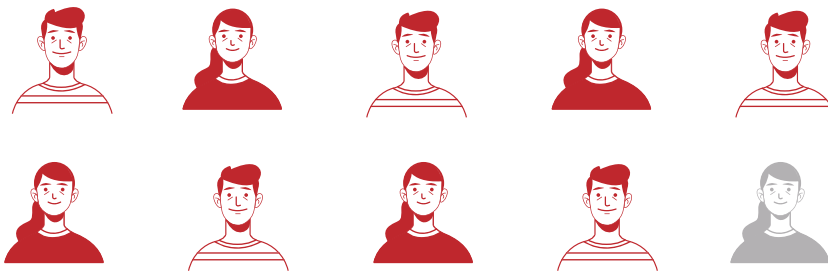
After the Large-Scale Social Restriction (PSBB - Pembatasan Sosial Berskala Besar) was relaxed, the government began to be confident in making the transition from self-isolation to adapting to the new normal. Economic activities and activities outside the home are allowed on a single note; all must follow health protocols. Therefore, the new normal will inevitably create changes in the behavior of Indonesian people.

Through an online survey of one thousand one hundred and thirty-one respondents and an independent digital study on the KG Media Google Analytics platform, we have found that there are weariness and a desire for people to return to their normal activities. From this desire, the public then creates various behavior changes to accommodate the new normal. From this research, we also map some strategic steps that can be taken for organizations or brands to face the new normal era in Indonesia.

# 01

## INDONESIAN PEOPLE MISSING THE WORLD OUTSIDE HOME

9 out of 10 Indonesian People Know and Understand  
About the Issue of New Normal

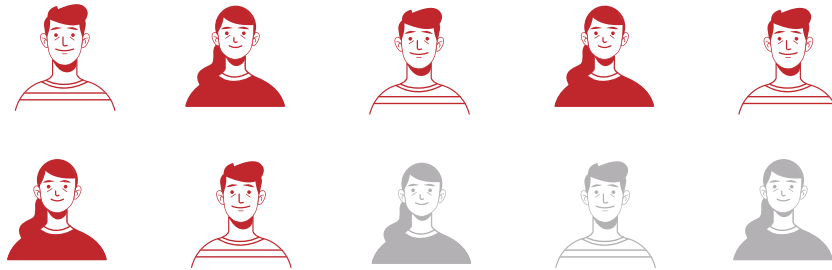


Indonesian people have to be trapped inside the house for months. Various activities that are usually carried out outside the home must now be mixed with the domestic realm. Office work, school, art and music performances, to watching movies must be brought into the house. Plans for trips, business affairs, concerts and seminars; all activities in public spaces must be postponed for self-isolation. The power of mothers as holders of the household domain is getting stronger. During a period of self-isolation, mothers must take multiple roles; as a nutrition provider, teacher, and office staff.

As a social being, staying in one place and limiting the scope of interaction can be a nightmare. In the digital era, social media and online technology may be able to pass through the barrier into spaces of human interaction. However, long-distance communication is only a temporary solution. For sure, there is a desire to return to normal activities; breathe fresh air, gather and interact in public spaces or restaurants, go to the movies, and travel. Some activities outside the home are irreplaceable with the presence of the internet and software.

When the government began to actively campaign for new normal, there was a glimmer of hope in going outside again. Jargon such as health protocols and 'new normal' are starting to surface. Public spaces, shopping centers, and office buildings are starting to have new mechanisms to provide a sense of security; hand washing place, disinfectant, to the floor with markings to keep the distance. With all the health protocols and mechanisms, do people feel safe to return to their normal activities?

## 7 out of 10 Indonesian People Feel Ready to Face the New Normal



The decision to enter the new normal era has divided society into several groups. Some feel enthusiastic and excited with full of hope to restart their life as usual. Some refuse because the virus transmission rate has not decreased. Then there are also public groups who are still hesitant in making decisions. They feel worried and enthusiastic at the same time.



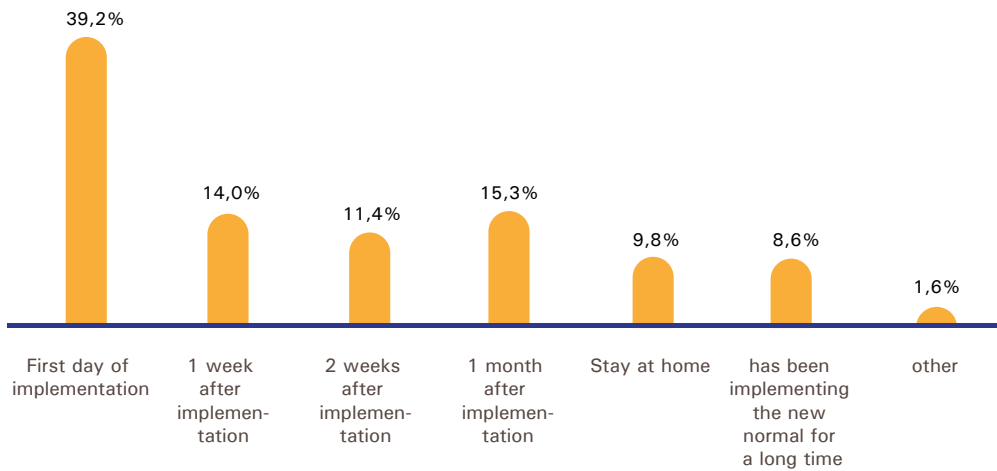
Graph 1.1

Source: Online survey "Indonesia Move On" on 1311 respondents

We cannot deny that the majority of Indonesian people want to return to their normal activities by following the policies of the new normal era. Many of the pillars and economic activities were lost due to the pandemic. Some people in the society cannot live without a certain income. Therefore, it is only natural that the majority feel ready to return to their activities, provided that all these activities are supported by various health protocols such as wearing masks, washing hands, and maintaining distance. However, we also cannot immediately forget that there are still many people who feel doubtful. This doubt comes from the unpreparedness of elements of society in implementing health protocols:

How strictly disciplined can this health protocol be maintained by the government and related institutions? How broad can this protocol reach public spaces? How ready are the various supporting infrastructures to start being applied widely and evenly? Concerns about the implementation of this health protocol have become a source of doubt for some people.

For the majority of people who are enthusiastic about new normal, months at home with confusing situations and various restrictions on activities slowly build enthusiasm high enough to start life as normal.



Graph 1.2

Source: Online survey "Indonesia Move On" on 1311 respondents

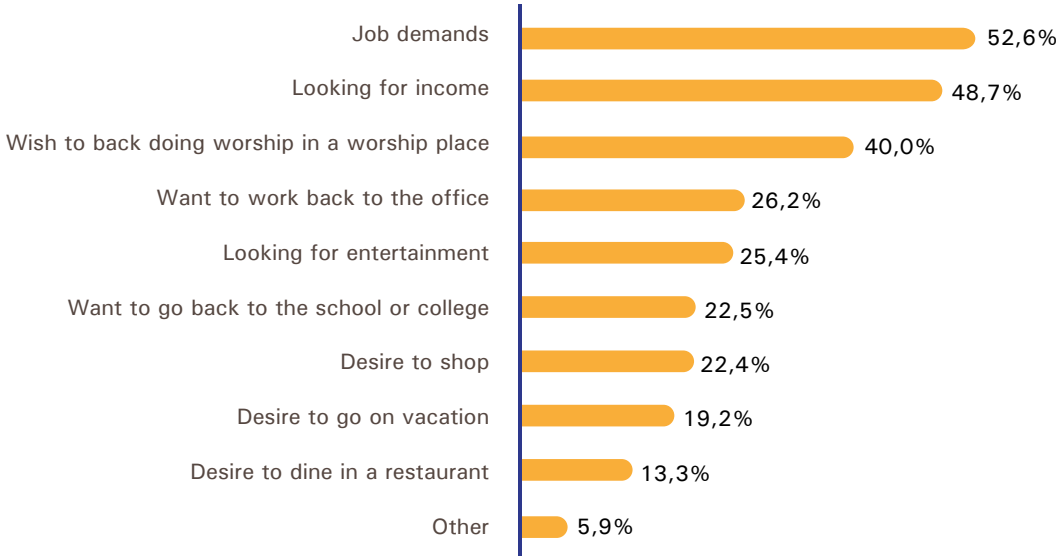
Most stated that they were ready to live in a new normal era from the first day the policy was established. In addition, some acted more carefully in implementing new normal, namely feeling ready one month after the implementation of the policy, there were even 9.8% who chose to continue their activities at home according to the government's initial policy. Behind the people who are enthusiastic about welcoming new normal, it turns out that 8.6% of the people have been implementing new normal for a long time. This group is people who work in the informal sector which forces them to leave the house to get a daily source of income and also those who do not get compensation for doing work from home.

## INSIGHT

If we look at the explanation and research results above, we can see a contradiction between statements of understanding and be ready for the new normal era with the fact that many parties are not prepared to implement health protocols and the high number of Covid-19 transmission nationally. From this contradiction, we can see that it is not the availability of health protocols that is the main reason for the readiness and enthusiasm of the public. **There are other motivations** that encourage people to return to their normal activities.

# HAVING THEIR INCOME BACK AND DOING WORSHIP BECOME THE MAIN MOTIVATION

The price that Indonesia must pay during a pandemic is not just the thousands of victims who have died. The downturn in economic activities and opportunities is one of the reasons why the government seems to be rushing to implement the new normal. The existence of thousands of workers who were laid off, traders, and entrepreneurs who went bankrupt, as well as various industries that were sluggish, became new pressure for the government and workers to return to their activities and work as usual to encourage economic activity.



Graph 1.3 Source: Online survey "Indonesia Move On" on 1311 respondents

The enthusiasm of workers to undergo new normal is also based on job demands that require them to return to work. The regulations that are implemented by the company to return to work in the office make most people are faced with the fact that they are ready to face new normal.

Not only that, the desire to return to religious activities in worship places is also one of the factors driving the new normal. In times of crisis, the spirituality of the people increases drastically. Ramadhan activities that are commonly held in worship places seem to increase people's desire to return to visit and pray at the worship place.

# INSIGHT

The main motivation to return to activities, as usual, is loaded with economic pressure and religious reasons. However, economic pressure and promises of implementing health protocols **created false self-confidence** that encouraged people to start doing activities outside the home, even though various scientific facts and data stated that the risk of transmission outside the house has not decreased at all.

## DO INDONESIAN PEOPLE SECRETLY STILL WANT TO GO ON VACATION?

Economic pressure and the desire to return to worship are the public's main reasons why they are ready to undergo the new normal. We then validated it by looking at more reliable data: data on news reading habits.

| Content                   | Pageviews |
|---------------------------|-----------|
| Vacation                  | 913.415   |
| Job Demands               | 791.682   |
| Worship Place             | 642.672   |
| Looking for Entertainment | 366.885   |
| Restaurant                | 352.660   |
| Looking for Income        | 12.653    |
| Shoping                   | 720       |

Tabel 1.1

Source: Google Analytics KG Media, Mei-Juni 2020

In the period from May to June, when the issue of new normal began to be discussed, the content on vacation and travel became the most read content compared to other content. If we look at the table above, vacation is in the first place, while the survey results show that vacation is in fifth place. This shows that it could be that the people's desire for vacation is stronger than the desire to return to their normal activities.

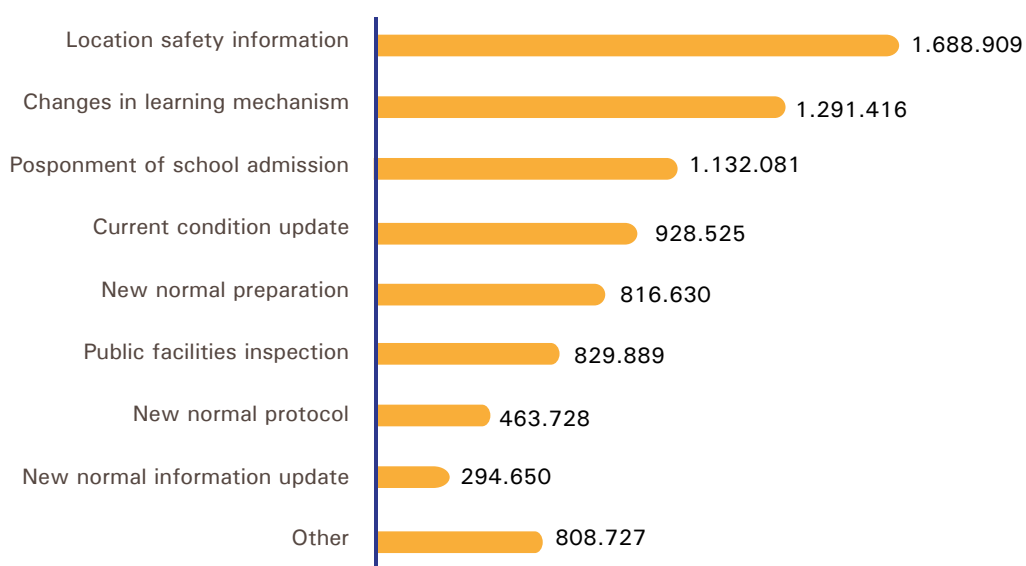
The PSBB period when the space for movement was completely restricted was one of the biggest sources of people weariness. Being at home for months without having the freedom to travel and tour seems to strengthen people's desire to visit tourist attractions. It is not strange if some time ago we saw a surge in public activity to tourist attractions at the Puncak, Bogor. This indicates that people were actually very enthusiastic about going outside and traveling when the new normal policy was implemented. However, the economic situation that has not fully recovered, and the

increasing number of infections has made people consciously setting their priorities for returning to work and earning income in order to be able to restore their family economic situation affected by Covid-19.

## MOTHERS AND STUDENTS STILL WANT TO STAY AT HOME!

In the 'Indonesia Bingung' research, we learned that mothers are one of the front lines to prevent the spread of Covid-19 in the domestic environment. A mother takes on multiple roles; as a teacher, nutrition provider, and information center to prevent their families from the threat of Covid-19. In the new normal era, mothers seem to have gotten along with their role as an information center, because it is mothers who feel the least prepared to adopt the new normal. From the survey, 44% of mothers felt worried about the spread of the virus in their families because they have to return to their normal activities.

So why do students also hesitate to return to their normal activities? From the survey, 44% of students were hesitant to return to their normal activities. The fear of students lies in school, they doubt that the school can implement good health mechanisms and protocols if they have to go back to studying as usual. Mothers also felt the same way with the issue of returning to teaching and learning activities as usual. They fear that their children will be infected with the virus if they have to go back to school.



Graph 1.4

Source: Online survey "Indonesia Move On" on 1311 respondents



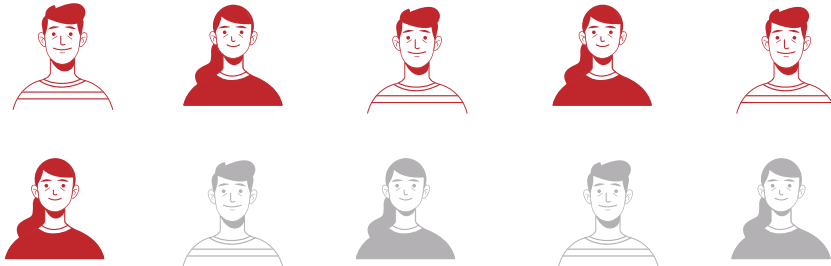
In the period from May to June, when the issue of new normal began to be discussed, media content on location (school) safety information and changes in learning mechanisms became the content most frequently read by students. Here we can clearly see the concerns of students to welcome the new normal era.

## INSIGHT

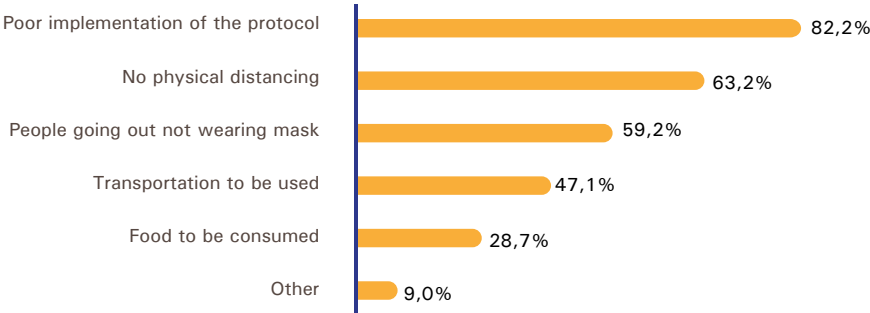
From the data above, we can see that mothers, as the guardian vanguard of the family at the domestic level, in times of crisis are **much more careful and rational than their partners**. From the survey results, fathers, as breadwinners, are more enthusiastic about returning to work and doing their usual activities. Meanwhile, the mothers, as protectors, highly doubt the new normal policy.

## PUBLIC FEEL THE ENTHUSIASM, BUT WHY THEY STILL SCARED?

6 out of 10 Indonesian People Feel  
It Is Not Safe to Go Through the New Normal Era



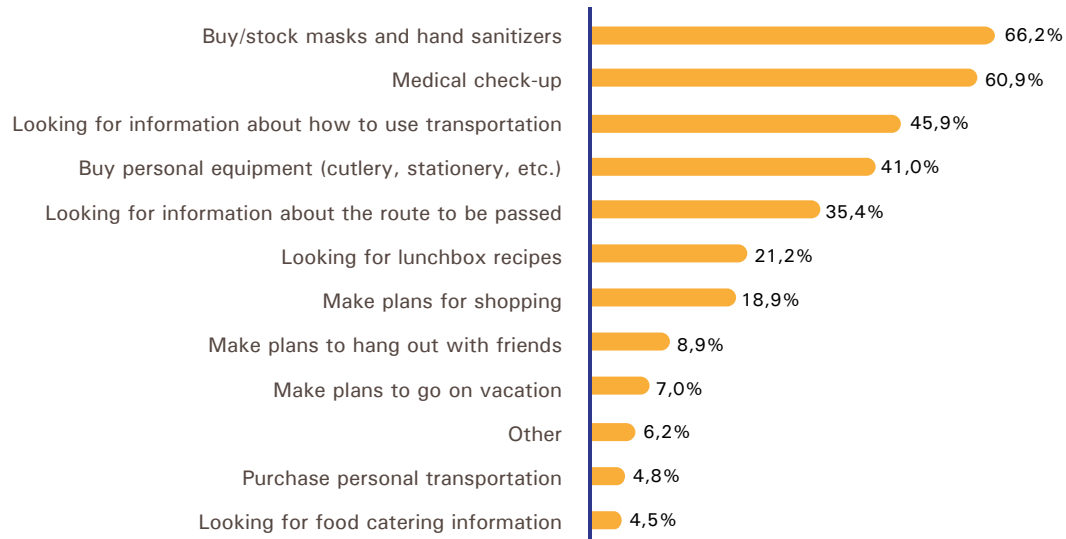
From the previous survey, we can see that there are still 26% of people who are unsure about the new normal policy. However, this concern is not exclusive to those who are doubters. People who are enthusiastic about the new normal also have concerns; this is evident that 6 out of 10 Indonesian people still feel insecure about the new normal era. So, what are these concerns?



Graph 1.5

Source: Online survey "Indonesia Move On" on 1311 respondents

From the data above, we can see that all the things people worry about the new normal are external things that they have no control over. Therefore, as a way to restore 'control' and justification of self-confidence, people actively take precautions by taking various self-protection measures.



Graph 1.6 Source: Online survey "Indonesia Move On" on 1311 respondents

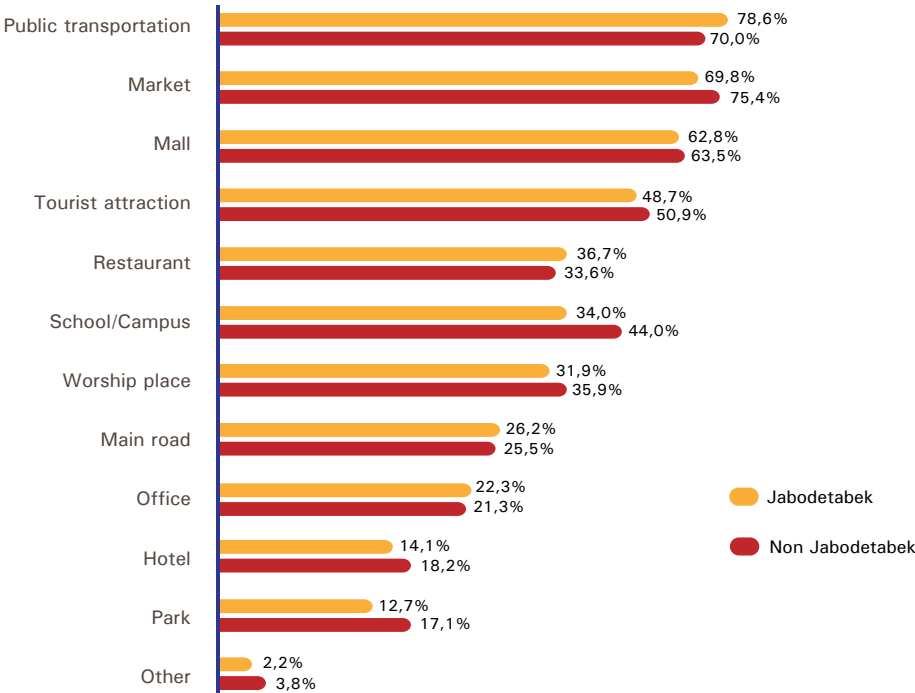
The data above shows the various precautions people take to stay healthy when facing the new normal. Even though most people are enthusiastic, people do not necessarily neglect to take care of themselves, worry and fear still remain.

## INSIGHT

Once again, we see a contradiction of the enthusiasm of people and the insecurity they feel in dealing with the new normal. This shows that it is not the health protocol that can convince people to return to their activities, nor the allurements of new normal policies, **but compulsion and the absence of better choices**; There is no government incentive to stay at home, so there is no other choice but to leave the house.

# 'PLAYING' IN A CROWDED PLACE; THEY ARE SCARED, YET THEY WANT IT

Public space is one of the places where Covid-19 spreads, therefore such places that are at the center of the crowd are the places that are avoided by the public. Most of the respondents stated that several places were considered the most worrisome places when the new normal policy was implemented, namely public transportation, markets, malls, and tourist attractions.



Graph 1.7 Source: Online survey "Indonesia Move On" on 1311 respondents

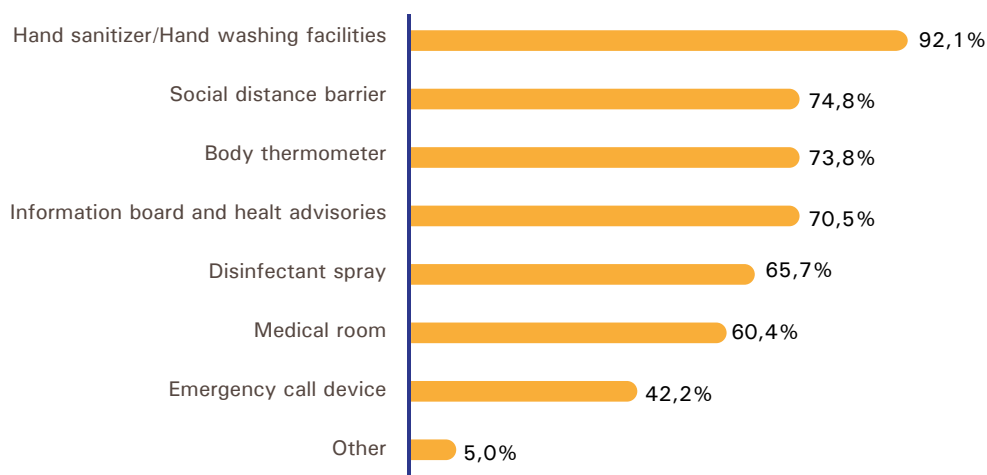
Everyone agrees that they should avoid the center of the crowd. However, the facts on the ground show that people still visit crowded places, especially tourist attractions. The market is indeed a place to be feared, but the fulfillment of their daily needs cannot be denied, so it is only natural that some people still visit markets and shopping centers. However, the crowds at the tourist spots are proof that people are willing to take the risk of getting a little entertainment to get rid of boredom.

## INSIGHT

From the explanation above, we can see that there are two groups of society in the new normal era. There are groups that want to do their usual activities because they do not have better options and driven by economic pressure. **There are also groups driven by emotional needs; back to normal activities due to boredom.**

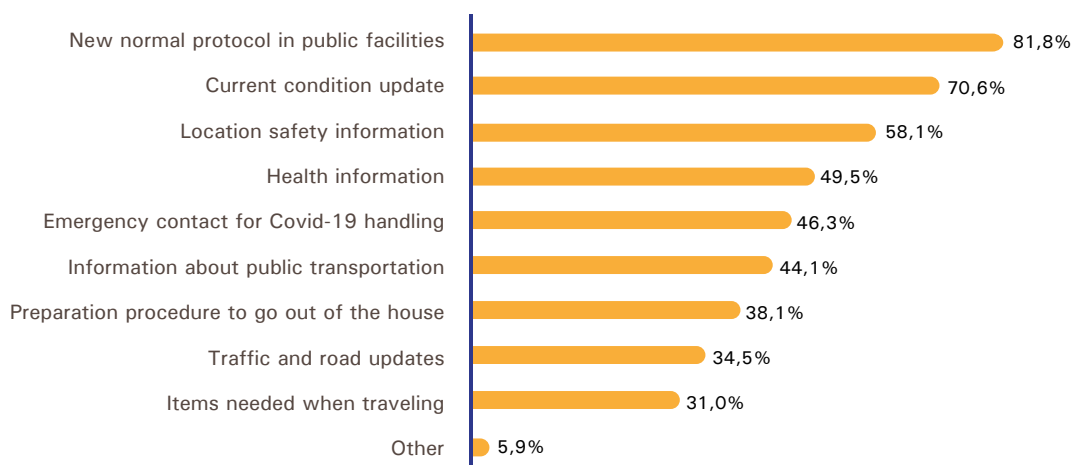
## INDONESIA NEEDS CLEARER HEALTH PROTOCOLS!

At this point, we must realize slowly that people will continue to carry out their normal activities even though the fear and worry still persist. Therefore, information on the application of new normal protocols in public facilities is very much needed by the public to reducing these fears and worries.



Graph 1.8 Source: Online survey "Indonesia Move On" on 1311 respondents

People who are ready to carry out various activities in the new normal need to be convinced and informed that the place they are going to and are going through has clear standard health protocols, which can be obeyed by themselves and by others who visit the place.

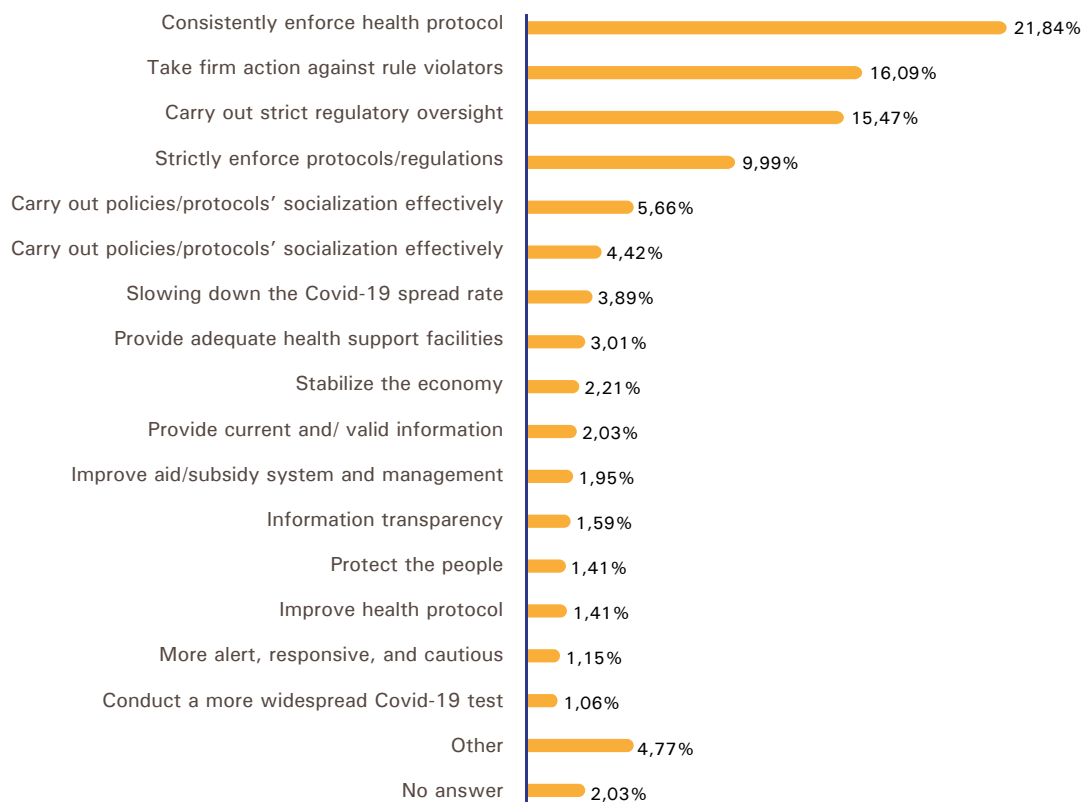


Graph 1.9 Source: Online survey "Indonesia Move On" on 1311 respondents

From the data above, we can see that people still feel the discomfort of being outside the room, so information related to the place to go or access is the most needed thing. Not only that, the existence of standard health facilities and protocols must be evenly distributed in all public facilities. Diverse regulations have the potential to confuse the public and increase disciplinary violations, so governments must provide clear rules, easily accessible information, and more robust health protocols to create a sense of security.

## INDONESIA NEEDS FIRMNESS FROM THE GOVERNMENT!

The implementation of new normal policies to keep the wheels of the economy moving requires government support to make it happen. This government support is expected to be in the form of firmness and discipline for people who violate health protocols. Given that health protocols are crucial, firmness is the minimum that must be fulfilled by the government.



Graph 1.10

Source: Online survey "Indonesia Move On" on 1311 respondents

From the data above, we can see that the people do not only want the implementation of the new normal policy, and then the government will immediately give up. More than that, people want three main things; consistency, discipline or action for those who violate, and supervision so that the public feels safe.

## **ACTIONABLE INSIGHT I - BE THE NEW WORLD GUARDIAN**

Health protocol is crucial in the new normal. Like it or not, scare or not scare, people will return to their normal activities. However, the government's new normal policy does not necessarily make people feel safe. There are still concerns about how health regulations and protocols can keep people safe for their normal activities. When trust in the government runs low, expectations in the private sector actually increase.

Grab and Gojek welcomed the new normal by implementing fairly clear and capable health protocols. Both brands ensure consumer safety by providing a shield on the drivers' vehicles. This is something that can calm people down to keep doing their activities.

What's more, brands can implement health protocols in more creative ways. KFC places Colonel Sanders-shaped boards on the seats to apply physical distancing. Burger King provides sombrero hats that have a large surface to keep customers at safe distances.

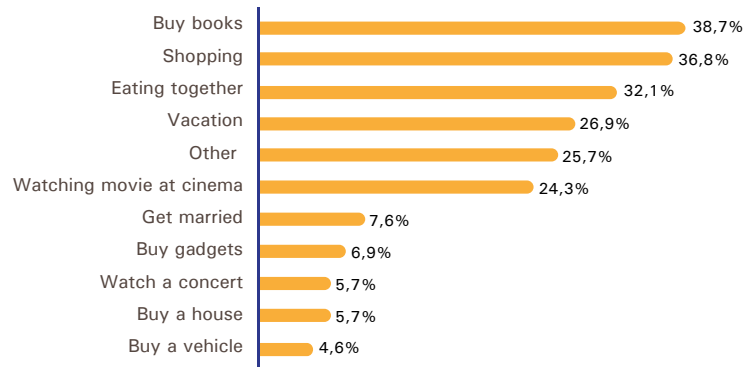
It is time for brands to make real contributions to become customers' guardians by providing facilities, programs, movements, and other forms so that they are remembered as brands with good empathy and have a close emotional relationship with their customers.

*And don't forget, do it with style!*

## 02

# INDONESIAN PEOPLE NEEDS RECREATION!

From the previous chapter, we learned that Indonesian people harbor the desire to take a vacation. A strong desire to get out of the house implies a longing for fresh air.



Graph 2.1 Source: Online survey "Indonesia Move On" on 1311 respondents

From the data above, we can see that the activities that the majority of people want to do are outdoor activities. Although in the previous chapter we learned that people harbor the desire for vacation, vacation is not the main priority that people want to do. Referring to Graph 1.3, we learn that tourist attractions are indeed one of the places people avoid. Not only that, health protocols that are deemed inadequate are also one of the reasons why traveling is not a top priority. However, we cannot deny that most of the activities that people want to do are activities that are outside the room. This indicates that people are tired of being at home and crave outside activities.

So, what's up with books?

Buying books is considered the most rational activity to do. Reading books can be done alone, does not take a lot of time, and is quite affordable. People consider avoiding activities that involve many people, hence entertainment that can be done alone such as buying books and shopping is quite popular in the new normal era.

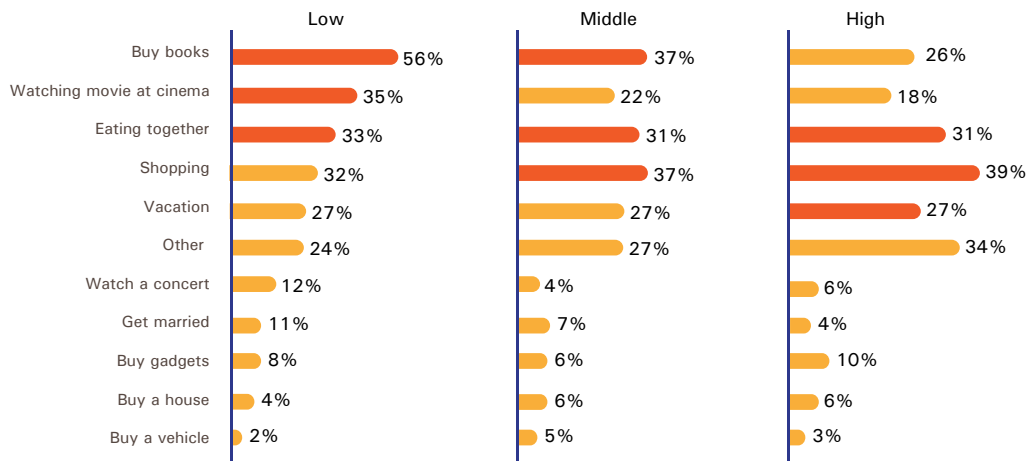
In Graph 1.7, we can see that people are strongly avoiding public transportation. However, if we look at Graph 1.3, people's fear of public transportation does not make people want to buy new transportation. People are still careful about spending their money during a pandemic.

# INSIGHT

Activities that are considered the easiest with a controlled budget are a priority for people in the new normal era. Buying books is the top choice because it is considered the easiest and most economical way to fill a lot of free time. **Products with high economic considerations such as cars, houses, and gadgets** are not a priority.

## DIFFERENT STATUS, DIFFERENT PRIORITY

From Graph 2.1, we can conclude that buying books is an activity that is a priority for the Indonesian people. So, do all social segments craving for books?



Graph 2.2 Source: Online survey "Indonesia Move On" on 1311 respondents

We try to re-validate it with reading habits data on news portals in KG Media (kompas.com, trlbunnews.cin, grid.id, etc.) and the results can be seen in Graph 2.2 where there are differences in activity priorities in each social segmentation.

The lower middle class prefers to buy books, watch movies, and eat together as activities that will be carried out in the new normal era. Middle class people do not choose to watch movies, but prefer to eat together and shop. The most different behavior is shown by the middle to higher class society. They set shopping, eating together, and taking vacations as activities to be carried out in the new normal era.

From the data above, we can see something interesting. Even though there are slight differences in priorities, everyone in each social class agrees that they want a vacation.



## INSIGHT

Every social class wants entertainment, even though the types of entertainment and priorities vary. This shows that **understanding the emotional context of the consumer segment of a product or brand is very important**. In difficult times, the middle-class segment prefers to carry out activities that are economical. Meanwhile, the top segment does not have a significant difference.

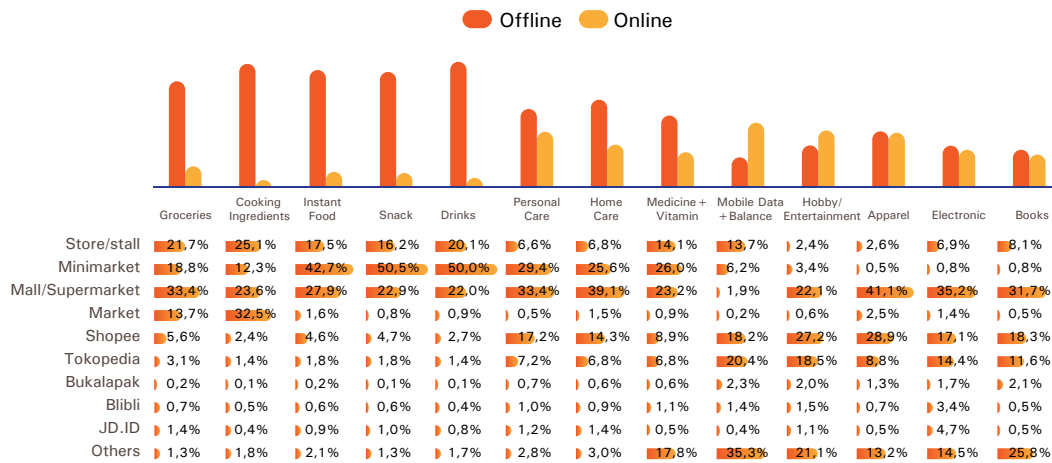
## INDONESIAN PEOPLE CHOOSE TO SHOP ON E-COMMERCE (IF NOT IN HURRY)

The high level of internet activity during the pandemic did not turn all shopping activities into online shopping when entering the new normal era. Some of the daily necessities cannot be waited for long. The purchase of basic necessities, cooking ingredients, instant food, snacks, and drinks is still done offline.

Daily necessities are still purchased offline through grocery stores, minimarkets, supermarkets, and traditional markets. Even though the place presents a crowd that creates a risk of the spread of Covid-19, the public remains determined to shop offline.

In the previous chapter, mothers expressed themselves as a group of people who were doubtful and afraid to face the new normal. However, this does not necessarily make mothers switch to making online purchases through e-commerce to buy groceries.

The e-commerce platform is considered unable to fulfill purchases quickly. Purchasing online, from ordering, transactions, and shipping, is considered uneasy and not fast enough, so people prefer to make purchases offline for their daily needs.

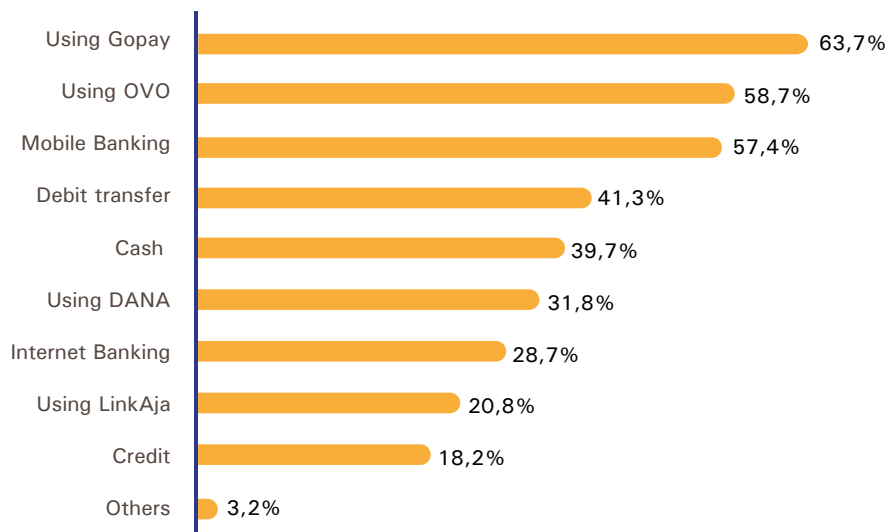


Graph 2.3

Source: Online survey "Indonesia Move On" on 1311 respondents

## INDONESIAN PEOPLE ABANDON CASH!

Payment methods made online, such as GoPay, OVO, and other online transactions are things that people will continue to do. The desire to maintain distance, minimize interactions, and various other convenience factors are the reasons people abandon cash. The speed and ease of transactions, also the availability of online payment methods at various merchants or shops have attracted people to choose electronic money.



Graph 2.4

Source: Online survey "Indonesia Move On" on 1311 respondents

GoPay and OVO are two of the most interesting method choices for use in the new normal era. In addition to being easy, various promo benefits and price discounts are the incentives for people to use electronic money. Not only that, the issue of cash security is also a consideration for this shift in behavior. But again, it's about control. People want control over what they can do and 'held' personally.

## **ACTIONABLE INSIGHT II – RETHINK CX: MAKE IT SAFE & EASY**

In the new normal era, ease is a keyword that brands must pay attention to. Why do people choose offline shopping instead of online shopping? Of course, because offline shopping is considered more practical, fast, and easy. More than that, customers want to feel in control. Convenience and safety are manifestations of consumer 'control'.

People are still afraid to go outside, but they are forced to shop because there is no other alternative that is faster and safer. This shows that there is still a lot of room to create convenience for customers.

Providing easy transaction services without having to meet face to face can be done by brands to help mothers in their daily lives and still provide a sense of security. This is done by Hypermart in providing a 'Park & Pick Up' service that allows customers to make transactions using instant messaging applications without the need to enter the store and interact with other people in it. Simply wait in the parking lot, the employees will order the goods.

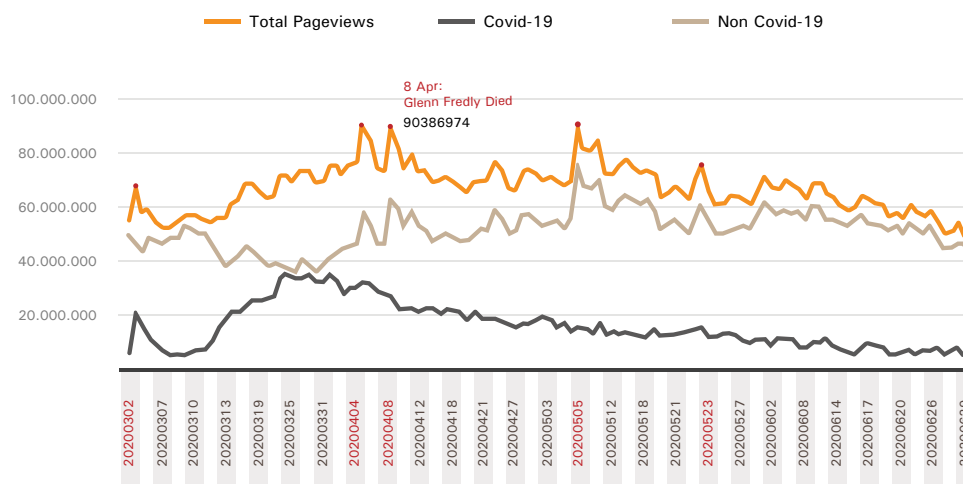
Not only that, various automotive brands have also started making various innovations to create convenience and provide control for customers. Various processes such as test drives, service routine, and purchases can now be done from home.

Therefore, as a brand we must begin to re-evaluate all brand-consumer interactions (customer experience), to ensure convenience and safety are our top priorities.

# 03

## INDONESIAN PEOPLE HAVE 'FED UP' WITH THE NATIONAL NEWS OF COVID-19

Since the first Covid-19 transmission was announced by President Jokowi in March, the news about Covid-19 has been ongoing; every hour, every day, through various media on almost all platforms. This storm of information varies, ranging from tips on preventing infection, medicines, to misinformation about conspiracies. Even some entertainment content is 'wrapped' with pandemic messages.



Graph 3.1 Source: Survei daring "Indonesia Move On" on 1311 respondents

From the graph above, we can see that there is a significant decrease in readability regarding topics related to Covid-19. The public feels weary in consuming content about Covid-19 so they start looking for other information. The news about the death of one of Indonesia's top singers is even more popular than Achmad Yuriyanto's announcement regarding the increase of virus transmission in Indonesia. Here we can see that the public has started to 'fed up' with Covid-19 news.

Looking for other content to get rid of the boredom of Covid-19 is a natural response from the public. If every conversation on social media and news portals always includes the keyword 'Corona' or Covid-19, then surely there will be some people who are looking for alternative content; to find peace of mind or just being bored with the same news. This weariness is an indicator that Indonesia is slowly starting to move on from Covid-19.

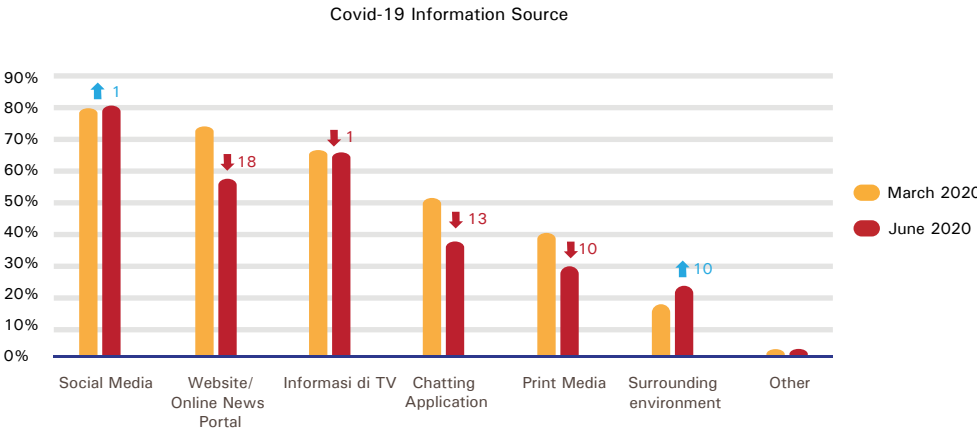
Not only that, mentally and in mindset, there is a shift from fear of Covid-19 to fear of the economic condition. Economic pressure is something that is more obvious to deal with than an invisible virus. The spread and transmission of Covid-19 cannot be controlled by an individual, but economic capacity can still be controlled and solutions are sought. This is what makes people shift their attention to other issues.

## INSIGHT

Over time, Indonesian people have to deal with two things; to survive the Covid-19 transmission, and to survive the economic shocks. Economic pressure, which is considered to have more urgency, **has caused fatigue and weariness on various national Covid-19 issues** that do not add any value, and cannot be controlled by some people.

## PUBLIC'S ATTENTION IS SHIFTING FROM MACRO LEVEL TO MICRO LEVEL

Fatigue and weariness on various issues regarding Covid-19 have bigger implications for the way people consume media. When it was first announced in Indonesia, Covid-19 was a national issue that shocked the entire social level. However, over time, people slowly began to realize that this national issue was something that could not be controlled, so people's attention shifted to something that could be managed at the individual level.



Graph 3.2

Source: Online survey "Indonesia Move On" on 1311 respondents

If we look at the data above, we can see that there is a significant increase in information sources on a personal level. The surrounding environment became the source of information that increased the most significantly. This shows that people's attention has shifted to the micro level; things that are close to individuals or the environment.

Several impersonal media and platforms, such as news portals, television, and print media, have decreased because the issues discussed are macro-scale issues that cannot be individually controlled. Instant messaging applications, although personal in nature, have a downturn because they are seen as a source of lies and misinformation. So that it does not become a source of reliable information.

Social media is still a source of information because, like the environment, people can get micro-level information on social media. The latest information about friends, friends, family, and various figures who are considered to have personal 'closeness' can be obtained through social media. In other words, social media is neighborhood life compressed to the binary level.

## **ACTIONABLE INSIGHT III - GO HYPERLOCAL**

When people want information and interaction at a personal level, then the brand should have entered into the level of the surrounding environment and housing complex. In other words: hyperlocal.


Hyperlocal refers to brands approaching and establishing relationships with customers at the individual level and the surrounding social environment. In this way, brands seem to be neighbors to customers. Provide needs and contribute to the public sphere in a more personal way.

One brand that is taking a hyperlocal approach is Bibli. During the pandemic, this e-commerce brand focused on selling products of SMEs, MSMEs, and even directly through farmers. Through the Bliblimart platform, customers can buy various daily necessities from the source at a much more economical price, while helping entrepreneurs and farmers in the surrounding area.

GoPay also carries out various hyperlocal initiatives in collaboration with the Indonesian Mosque Council. Hundreds of thousands of mosques in various housing complexes can now receive infaq via GoPay. This makes it easier for people to share their kindness while actively keeping their distance; donate without touching or interacting. Through this initiation,

the number of donations and infaq has doubled, so that more mosques can help the surrounding public during difficult times.

Therefore, in this new normal era, as a brand we should become 'neighbors' for customers. By becoming neighbors, we can interact with the public directly. However, as a brand, our interactions with society must be done with various contributions. We can contribute to improving health protocols, opening various access and facilities, and actively maintaining the mental health of residents.



**The Team of  
Indonesia Move On:**

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