









INDONESIA IS CONFUSED:



Indonesian Consumer Behavior amid COVID-19 Outbreak





KG Media RESEARCH



APRIL 2020







INTRODUCTION

By Wisnu Nugroho Chief Editor of Kompas.com

Indonesia was not the only one that is not prepared, but the world. Indonesia was not the only one that is confused, but the world. The certainty of modernity results seems to collapse before sudden existential uncertainty. The existential uncertainty is simultaneously invading globally in the minds of individuals throughout the world. COVID-19 "surround the house" is the cause.

Even though physical distance may be far away, media network brings individuals closer with the existential uncertainty. In this era, when we refer to the media, it includes social media. Why do we need to mention this and underline it? Facts show that social media is like a double-edged knife: being a source of information and misinformation.

The Directorate of Information Application Control of the Ministry of Communication and Information is in the forefront to overcome this misinformation. Up to April 9th, 2020, there were 492 COVID-19-assembled hoaxes circulating on social media. Lastly, hoax concerning patient under surveillance (PDP) escaped from Undata Hospital, Palu. The Lying information is spread on Facebook and becomes a chain on Whatsapp service.

More than a month in unpreparedness, confusion and existential uncertainty, the public learns. Toward all information which comes into grip, doubt is first pinned. Media that is considered to have credibility becomes reference to search for the "truth". In learning opportunity, the public began not to spread information from social media whose truth was unclear.

The "truth" and "certainty" implemented by the trusted media amid this existential uncertainty becomes the public grip. To the "truth" and "certainty" found in the COVID-19 era, brand is present as an introduction or accompaniment of the presence of kindness. Because the public works from home, learns from home and worships at home, the kindness that is delivered goes directly into homes.



We know the ruler of the house: Mother. Amid existential uncertainty, mother's role, which naturally is the life keeper, appears very central. Working from home, learning from home and worshipping at home within mother's supervision. Mother's role and supervision starts from taking care of the food, accompany while learning, reminding of worship time, charity, to finding information in order to protect the family from COVID-19. This is what we found.

These findings complete other findings due to the change we were "forced to" to break the chain of COVID-19 spread. Toward findings that will become a "new normal", we tried to respond in an effort to learn from the fear that COVID-19 will develop.

About the continuation of all those matters, we are not able to imagine it because we all face this situation in unpreparedness.

Then how do we respond to this? It is difficult to answer it. In Regards to this COVID-19, the famous German philosopher, Jurgen Habermas (90) reminded that economists and social sciences need to refrain from careless predictions.

"One thing which can be stated, there has never been so much knowledge about our ignorance and the encouragement to act and live under uncertainty," Habermas said.

With silence, let us respond to the existential uncertainty which simultaneously invades globally to enter the corner of our homes. Findings in this survey and study can be the foundation for required responses. Mothers spirit as life guard can be a fortress against invasion.





THE WORLD IS NOT PREPARED

In 2015, Bill Gates predicted that the world would not be prepared to face 'crisis' that would kill millions of people, not war, not nuclear, but a pandemic.

At the end of 2019, a virus called COVID-19 was identified in Wuhan, China and spread throughout the world in just a few months. Bill Gates stated correctly that the world is not prepared.

Many countries were late to respond the COVID-19 threats. When WHO implements a pandemic status, only then governments in a number of reactive countries undertakes variety of prevention and socialization to deal with the spread of virus that is quickly transmitted.

The world is panicked, scared, and angry as the stock market crashes, oil prices and economic conditions became increasingly uncertain. Consumers were panic by buying goods in droves. Everyone tried to stay at home. Some people who underestimated and insisted to be outside home are insulted and ostracized on social media.

When major cities in the world became quiet, the world realized that humanity was not prepared to face a pandemic. How do Indonesian consumers respond to the COVID-19 pandemic?







INDONESIA IS CONFUSED

When President Jokowi announced that COVID-19 had found a positive case in Indonesia, all public attentions was focused into one topic, the corona virus. Prices of masks and hand-sanitizers rebound, various basic needs are scarce, panic buying is implemented by some people to cumulate variety of basic and health needs. This news appeared for several days.

Instantly Indonesia began to discuss and enlivened COVID-19. The news about corona virus dominates social media, online media, television and all media. But the flood of information does not guarantee the truth and accuracy of the news. Hoaxes, misinformation, and lies flooded the entire Indonesian communication channels. Such as much garbage implemented by floods, so does garbage of information when it is flooded with information.

Indonesia is confused. Reactions from the community are diverse; ranging from panic, fear, anger, to the indifferent. Everyone suddenly campaigned for hand washing, various medicines and corona virus prevention methods. Research, journals, and research are transmitted to the media, but only few know the truth behind all this information.

The COVID-19 pandemic does not only affect the way people consume information, but also the lifestyle and usage of various goods and products. The study in this whitepaper aims to see the consumption patterns and behavior of Indonesian people in detail amid the COVID-19 pandemic.

Through online surveys of two thousand one hundred and three respondents and an independent digital study on KG Media Google Analytics platform, we found more than just community responses and reactions, but also knowledge for companies or brands to deal with a 'storm' called COVID-19.







METHODOLOGY

We combine the two data collection processes to see how Indonesians respond to activities and goods and services consumed during a pandemic, through online surveys and data collection on KG Media Google Analytics platform.

The process of collecting data through KG Media Google Analytics platform is implemented to see the public's content consumption behavior. Through analysis that is implemented, we can see how changes in content consumption occur before and after the implementation of independent isolation.

In addition to knowing changes in content consumption patterns, we also collect information in regards to the behavior and consumption patterns of consumer goods and services during independent isolation by implementing online surveys toward two thousand one hundred and three respondents who have an average age of sixteen to forty-five years old. The process of collecting survey data is distributed through KG Media assets consisting of social media, banners on news portals, and e-mail. Whereas demographics of respondents can be seen in the following graph:





01 ACCEPTANCE OF COVID-19 INFORMATION IN INDONESIA

BEFORE THERE'S A CASE IN THE COUNTRY, INDONESIA WAS INDIFERRENT TO CORONA VIRUS





Issues concerning COVID-19 have been widely reported globally in February. However topics concerning the spread of corona virus began to be discussed by the public in the beginning of March when President Jokowi officially announced the first case in Indonesia. At that time, instantaneously there was an unusually sharp increase in readership concerning corona virus topics.



Graph 1.2 Sources: KG Media Google Analytics

As comparison, news concerning the death of one of Indonesia's celebrity had dominated the news of Indonesian society discussions although the news concerning the spread of COVID-19 was started dominating global news at the same time. The value of COVID-19 news has not yet been seen.





In a period when the news in regards of COVID-19 started to reach breaking point, we began to spread online surveys to see the acceptance and respond of Indonesian society.



Graph 1.3 Sources: Online survey of 2103 respondents

In graph 1.3, we can see a very diverse public response. However there is an anxious sentiment and confusion. Although the majority chose to protect themselves by washing their hands and restricting themselves, it turns out that there are large number of residents who are still active as usual and cumulate various essential goods such as masks and hand sanitizers.

An amount of information in regards of COVID-19 which increased dramatically at this period did not necessarily serve as guidance for the public to deal with a pandemic. An amount of milling information in various media actually aggravates an existing confusion and panic. Therefore, why did this happen?





MEDIA IS A SOURCE OF INFORMATION AND MISINFORMATION



Social media is the main source of information for the public to obtain information concerning COVID-19. The information obtained is quite diverse, ranging from personal tweets, articles, to opinions and 'research' results whose truth is questioned. Social media actually opens a 'gate' for public confusions, because no one can stem the lies and misinformation produced. There is no verification process on social media.

It is fortunate that there are still many people who believe in the media through credible journalistic products. However, if we look at graph 1.4, we can see that an instant messaging application has become one of the information sources chosen by the public. Whereas instant messaging applications is one of the many platforms that spread misinformation which may cause an adverse panic and confusion.



Tendencies of the public to simply accept information is actually exacerbated by the view that the latest news is sufficient. In graph 1.5, majority chose media based on their ability to present the latest news. Whereas, the latest news is not necessarily completely accurate, credible, or trusted.



CREDIBILITY OF THE MEDIA IS THE MAIN KEY

In graph 1.4, there are still many residents who rely on online and offline media journalistic products as source of information. This matter certainly cannot be separated from an image of media credibility, so that the media is trusted by the public as source of information

Trust to the media can be seen in graph 1.6. The public can be sure that the information is true if such information is released by credible and trusted institution or media.





However, if we look at the graph above, there are still many people who believe in the opinion or information coming out from influencers. This is in line with findings in graph 1.4 that social media is a very large source of information. Thus it is reasonable that influencers are still trusted by some circles even though the opinion of influencers cannot be justified sometimes.



Graph 1.7 Sources: Online survey of 2103 respondents

The good news is that not all citizens immediately consume information without first checking the truth of such information. In graph 1.7, majority of citizens re-check information by checking the truth in other media. Not only that, residents also actively checked the source of news information before trusting it or simply spreading it.

From graph 1.7 above, interesting things are tucked; there is a tendency for citizens to see the comments column before trusting information. This shows that someone's comments can be a verifier of the truth of information or media. If there are some circles of the public who believes in a comment, thus the column comments or public opinion on an information or content can be a very powerful tool to encourage opinions on information.





INSIGHT

INDONESIA REQUIRES AN ESSENTIAL INFORMATION

When crisis occurs, there is an urgent need for the public to obtain the latest information. But it is to be considered that the latest information is not necessarily true. The large use of social media, as well as the need for information is widely used by irresponsible parties for spreading lies and misinformation.

As brand, it is reasonable that the topic of COVID-19 desired to be avoided to preserve the image and avoid controversy. Furthermore, from the data we obtained, precisely the requirement for this information can be used by brands to help spread information that is proper and true, or trusted.

The need for this information can open up opportunities for brands to implement various campaigns which spread positive messages.

Brands like Coca-Cola widely spread the message of social restrictions through variety of formats and content. Fast food restaurants such as Popeyes, use moments of social restriction to provide free Netflix application passwords for consumers to stay at home.

The aforementioned are just few small examples, where brands may contribute to the kindness in this moment of crisis. If we examine some of the data beforehand, thus we can conclude that there must be a change in the mindset of brand that is passive, silent, and to look forward to, toward brands which actively spreads a message of kindness or what we call as Benevolent Messenger or as Messenger of Kindness.





Requirements for information during crisis are huge. However we know that among information that is so overflowing, many irresponsible parties are using this need to spread lies and misinformation.

Here the credibility of media will be very beneficial for the public because of its role in sorting, selecting and verifying the truth of information. We see that citizens are currently quite critical in reading and processing information.

Therefore, if brands desire to be a messenger of kindness, the media can be a very powerful tool to spread humanist, positive messages and kindness in times of current crisis. Credible media is widely trusted by the public as a valid source of information.





02 INDONESIA'S RESPONSE TOWARD COVID-19

86%

OF INDONESIAN SOCIETY FOLLOWS THE GOVERNMENT'S APPEAL TO IMPLEMENTACTIVITIES AT HOME



THE PUBLIC ARE FORCED TO SHOP OUTSIDE



Graph 2.1 Sources: Online survey of 2103 respondents

An appeal to isolate themselves at home to suppress the spread of virus has not been fully able to be implemented by all citizens. This occurs because the public's need to obtain essential goods such as foods, drinks and medicines can only be obtained by shopping outside home.



Online stores are not yet an option because there are still many who feel that online stores are not as fast and complete as conventional stores. This matter can also happen because there are not many online shops which specifically provide essential daily goods and an equitable infrastructure to deliver the goods quickly.

INSIGHT

BRAND HAS AN OPPORTUNITY TO REDUCE CONFUSION THROUGH "PROPER" INFORMATION

Compulsions to shop for essential needs outside home are certainly dismaying for the public. Moreover, the lack of information at domestic level is clear and reliable. For example on how to protect yourself when you have to shop outside home. This is an opportunity for brands to provide proper contextual information.





03 INFORMATION REQUIRED BY INDONESIA

THE IMPORTANT ROLE OF MOTHERS IN COMBATING COVID-19, NAMELY PREPARING NUTRITIONAL FOODS

When entering a pandemic, mothers have quite an important role in ensuring family health. Mothers cook more to ensure the food intake of family members who during the pandemic chose not to buy food outside as usual.

In graph 3.1 it can be seen that majority of respondents, workers, non-workers, students and scholars claimed of not buying foods. They choose to cook their own food at home compared to buying it at a roadside stall or restaurants.





If you don't cook yourself, ordering food through online food ordering application will be an option. There is a perception that ordering food online is more 'safe' than having to go out and buy food yourself.

However, for some levels of society, limited purchasing power and economic capacity forced them to buy food directly outside, especially in traditional food stalls. Cheap and economical prices are the main motivation for eating outside.





50%

OF PAGE VIEWS ENHANCEMENT FOR CONTENT RELATED TO COOKING ACTIVITIES

With an appeal from the government to work from home, learn from home and worship at home, mothers are forced to be creative in cooking nutritious food for all family members at home. Mothers often use online media to search for the needs of recipes. This is proof that there is an increase in page views on content related to recipes during this pandemic.

Daily recipes such as turmeric leaves fried fermented soybean, clear vegetables, and stir-fried water spinach became very popular. Not only that, recipes that are considered to improve health such as spices and a hot drink with sweet potato balls (wedang ronde) have also became quite popular.



MOTHERS BECAME FACILITATORS OF CHILDREN'S ONLINE LEARNING

Graph 3.2 Sources: Online survey of 2103 respondents

Not only activities to fulfill daily needs, mothers also have an additional role amid social restrictions. Mother became substitute for teachers at home by facilitating and overseeing children's learning process online.

In graph 3.2, there is a drastic increase in downloading Ruangguru online learning application by housewives. In addition, they are active in providing the best learning facilities for children to be able to learn in new conditions and being different from their daily lives.





60%

OF PAGE VIEWS ENHANCEMENT FOR CONTENT RELATED TO SCHOOL LESSONS

Mothers often searched for information as well related to school lessons through various online applications and media to support children's learning and teaching processes.

23% of Page Views Enhancement in Children's Media

Not only that, children's media found at KG Media experienced increase in readership, especially in content related to 'stories'. Findings of these data may conclude that, during social restrictions period, togetherness of mother and child is increasing. Mothers not only became facilitators who help learning, but also provide other entertainment such as reading and giving story reading content to their children.

Not only searching for information on cooking recipes and school lessons, mothers also watched more television program than usual. Based on results of our research, there was an increase in television viewing by women during a pandemic. The important role of mothers in maintaining stability and family health from the danger of spreading viruses, it turns out they are actively searching for the best information.

Demography	Variable Target	REGULAR	WFH	%DIFF
ALL	ALL 15+ Upper (100%)	1.17	1.71	46.2
GENDER	F 15+ Upper (51%)	1.14	1.75	53.5
	M 15+ Upper (49%)	1.22	1.67	36.9
AGE	15-19 Upper (10%)	0.67	1.10	64.2
[20-29 Upper (21%)	0.64	0.89	39.1
	30-39 Upper (27%)	0.92	1.40	52.2
	40-49 Upper (20%)	1.30	1.94	49.2
	50+ Upper (22%)	2.11	2.90	37.4
REGULAR -WFH				



Graph 3.3 Sources: Analysis of Changes in Audience

0.7



INSIGHT

PROPER INFORMATION MUST 'ENTER' THE HOUSE

Requirement for information related to household matters is of more concern to Mother as vanguard in the family during recent pandemic.

In addition, this pandemic also changes the habits and routines of family members who work and study at home. Therefore, this can open up opportunities for brands to be present through information or create various campaigns and activities with contextual content.



FROM CINEMA TO NETFLIX, FROM ORDINARY CONCERT TO VIRTUAL CONCERT



Graph 3.3 Sources: Online survey of 2103 respondents

While at home, while not working or studying, Indonesian society turns to social media to obtain entertainment and interact with one another. It turns out there is something interesting here, Netflix is made as one of the entertainment options while at home for workers, whereas students prefer to play games.

Here we can see that when facing crisis, requirements for entertainment and the use of social media will actually increase. Residents want to momentarily divert attention from various problems and crises which exist outside home. With an appeal to stay at home, several musicians and celebrities became creative. Music concerts which were originally held outside the room were then brought virtually through social media. Entertainment is something that is universal, as long as there is an internet connection, entertainment can be enjoyed anywhere, anytime.

BRAND HAS AN OPPORTUNITY TO BECOME A SOLACE

High requirement for entertainment while being 'trapped' at home is an opportunity for brand to bring out their souls and creative actions to create 'proper' entertainment and beneficial for consumers.

News and information of COVID-19 which always floods the news and social media can also cause psychiatric disorders called psychosomatic. Fear and panic caused subconscious mind to produce physical symptoms without disease. Therefore entertainment may be distractions which cause the public forget less about the crisis that is happening.

Proper entertainment does not mean merely entertaining. Proper entertainment is entertaining by having deeper goals; namely to help ease the burden and give comfort.



Brands such as NarasiTV collaborate with Kitabisa to provide concerts that are held virtually to motivate the public to stay at home and help others by encouraging them to donate. Meanwhile, Clas Mild held a virtual concert to encourage people to continue working even though they were at home.

Besides its purpose of entertaining, entertainment content can also be a tool to deliver positive messages which may help someone's life become better. In times of crisis like this, brands should be able to be a Kind Entertainer.









04 INDONESIA DESIRES TO HELP EACH OTHER

14%

OF INDONESIAN SOCIETY STILL IMPLEMENTS NORMAL ACTIVITIES AND PRACTICES OUTSIDE HOME

Several companies do not apply policies to work at home for one reason or another. There are also companies which issue shift work policies, such as working a week from home and the following week working in the office as usual. This makes some people have no option and keep being active as usual.

The uncertainty of government policy also makes society in several areas continue implementing activities as usual. Not only that, there are several layers of society in the informal sector such as traders and small entrepreneurs who are forced to keep selling in order to continue make living. Therefore, it is better for workers in this informal sector to be assisted.

SOCIAL MOVEMENT FOR REALITY OF SOLIDARITY

Several celebrities and influencers have made many social movements to help fight the spread of COVID-19 through various fundraising and donation actions. Even so, there are still plenty of rooms for campaigning social movements to help the layers of society whose income has been drastically reduced due to the impact of the spread of corona virus.

As brand, we can be a spirit of mutual cooperation or solidarity and pioneers to implement various campaigns which may ease the burden on consumers. As we know, Indonesia has a high spirit of mutual cooperation to help one another in times of difficulties.





Brands such as Hyundai became Social Trigger to launch campaign to ease the burden on consumers by providing free installments for 6 months for car owners who lost their jobs or businesses due to the impact of the spread of COVID-19.

In times like this social movements can be a crucial investment for brands as humanitarian crises will always be a collective memory of a generation. Anyone who is active in a positive way will always be remembered and became part of history of that generation.





05 WHEN INDEPENDENT ISOLATION IS NORMALIZED

NEW WAYS OF WORKING IN INDONESIA



Graph 5.1 Sources: Online survey of 2103 respondents

Working from home does not stop Indonesian workers from exchanging messages via Whatsapp application or using email. In fact, both platforms are important to support work while working from home.

In addition, there is Zoom application where its usage increases while working at home. As video conference application, the use of Zoom is unavoidable since discussions, meetings and discussion sessions require direct interaction, and Zoom is capable to support these matters.

There is also Ruangguru which is becoming very popular within non-workers such as housewives. Teaching and learning activities of children, who had been in school, are now forced to move to online platforms where Ruangguru is the first option. Not only that, Ruangguru itself also provides free services for all application features during teaching and learning activities at home. This was certainly welcomed in a positive way by Indonesian society.





NEW WAYS OF LEARNING IN INDONESIA



Graph 5.2 Sources: Online survey of 2103 respondents

For students, Ruangguru became very important to support learning activities at home. Not only that, Google Classroom became popular because it is widely used by teachers who tried to teach online.

Here we can see that it is potential for teaching and learning activities to be implemented entirely online. There is a change in mindset that learning cannot only be implemented at school, but it can be implemented anywhere and anytime.

In the next few years, as Indonesia's infrastructure is more capable and equitable, the 'war' of online education content will become more violent. This could be an opportunity for various companies and brands to start looking at the potential of various online educational content provider applications.





ONLINE SHOPPING WILL BE A STANDARD





Even though Indonesian society prefers to shop conventionally in grocery stores and shopping centers, this does not mean that online shops are empty of buyers. Online purchases and transactions are still in demand, especially for essential health products such as masks and hand sanitizers. Precisely with the existence of social restrictions, several layers of society became creative and began producing their own various essential needs for resale online.

As online shop infrastructure develops in Indonesia, online shopping will be faster, easier, cheaper, and covers all levels of society. When online store industry ecosystem in Indonesia is already qualified, it is not impossible that the public will implement shopping activities at home.

This COVID-19 pandemic will provide awareness to the public that online shopping turns out to be very easy and practical; this will encourage online purchases to become a new standard. Brands which have not yet implement digital transformation will be very far behind.

INSIGHT

TRANSFORMATIONS FROM 'ONLINE AND OFFLINE' TO 'ONLINE EVERYTHING'

The COVID-19 pandemic showed the public that work, study, entertainment and shopping can be implemented online. While the public begin to realize that they can implement everything at home through various online applications and platforms, there will be more requirements to make online technology infrastructure more capable.

If this infrastructure is qualified, thus it is not impossible that in the future all activities ranging from the lightest to the most essential can be implemented online. In other words, there will be an equilibrium referred to as 'Online Everything'.



Currently activities are still combining online and offline capacities. Workers in the formal sector usually have to go to the office and perform 'physically' in order to be able to work. However with the existence of internet and various job support applications, several works should be fully implemented online. This applies with variety of other activities such as shopping and entertainment.



The need to implement digital transformation will be crucial for brands and companies. After this pandemic ends, the use of online platforms will be increasingly normalized. The public will be increasingly fluent in using various online technologies. Thus there is no reason to delay digital transformation. Brands or companies that are late or fail to implement digital transformation will be far behind in the next few years.







CONCLUSION

INDONESIA NEEDS HELP TO STAY CALM

DO NOT BE CONFUSED, INDONESIA

COVID-19 pandemic is a global crisis which threatens the livelihoods of many people. This virus not only killed 'physically', but may also kill the pace of global economy. It is reasonable if the response of humankind is fear, panic, anger, and confusion. Indonesia is inseparable from those feelings.

When President Jokowi announced the first case in Indonesia, thousands of information concerning COVID-19 suddenly surfaced, ranging from persuasion for social restrictions to various therapies to prevent COVID-19. Lots of Misinformation, lies, and panic takes place that it created widespread confusion throughout the country.

The response of Indonesians is so diverse, some focuses on health, others focuses on survival by stockpiling. This happens since the information is so abundant from various media. However, the public has begun to be smart, because information is not consumed slavishly; the role of credible journalistic media is precisely to be a 'keeper' so that the information obtained by the public is still guaranteed.

While the public is confused at home, they can adapt quite quickly. Beginning to work, studying, eating and enjoying various entertainments, all of which are implemented online from home. This will certainly encourage the public to increasingly adapt various online technologies. Therefore the company or brand has the need to implement digital transformation as soon as possible to anticipate these changes.

The COVID-19 pandemic raises awareness that we face this crisis not as individuals but as fellow human beings. Therefore we have an obligation to contribute in spreading the truth, creating kindness, and helping ease the burden of others. This obligation does not only rely on individuals, but also on brands and companies. Since the brand's relationship with consumers is not only transactional, however also emotional just like fellow human beings.





KEY INSIGHT

2

3.

THREE GOLDEN OPPORTUNITIES FOR BRAND

Through various data in this study, we can conclude that there are three roles for brands to be able to communicate to consumers during this crisis:





Coca-Cola campaigned for motivation to implement social restrictions through various media, one of which was to set up a giant billboard in Times Square, New York.

Become a 'Kind Entertainer', namely brand that provides beneficial entertainment for the public



Clas Mild encourages Indonesian netizens (internet and citizens) to remain productive and work despite being at home by encouraging various musicians to implement virtual concert.

Become a 'Social Trigger' to help the layers of society whose economic situation is disrupted



Hyundai implements campaign to ease the burden on Hyundai customers by freeing installments for 6 months for car owners who lost their jobs or businesses due to COVID-19.



MEET YOUR TRUSTED PARTNER



MEDIA/ DISTRIBUTION PLATFORM













magentic









Contact us for more info: d.gemiano@kgmedia.id







THANK YOU











