



Impact of COVID-19 on Consumer Behavior in Indonesia

MMA Webinar Series
April 03, 2020

In Partnership with





MMA's Purpose

WHO (The People We Serve):

Prime Audience: Pioneering Chief Marketers

WHY (Our Reason for Being):

Purpose: To enable marketers to drive innovation and enduring business value in an increasingly dynamic and mobile-connected world.

WHAT (Our Strategic Priorities):

- 1. Measurement & Business Impact:** Drive marketing effectiveness and the future of measurement for sustainable business growth
- 2. Marketer Org Development:** Redefine marketing organization dynamics and future capabilities needed in a data and device connected world
- 3. Inspiration:** Lead marketing innovation and creative effectiveness/impact for mobile and emerging technologies
- 4. Advocacy:** Establish standards and self-regulatory guidelines to improve consumer trust and confidence in marketing and connected devices

Presenter



Rajiv Lamba
Founder and CEO
Neurosensum &
SurveySensum



Moderator



Rohit Dadwal
Managing Director
Mobile Marketing
Association
Asia-Pacific, Ltd.





Our Agenda

1. Consumer Sentiment
2. Manufacturer Sentiment
3. Impact on Consumption Behaviour
4. Impact on Media Habits
5. How Brands are responding?
6. Opportunities Ahead

Consumer Survey

Sample Size: 500

Male: 50% Female: 50%

Method: SMS/ WhatsApp Surveys



FW Timeline: 20th – 21st March

Business Survey

Sample Size: 80 B2B Respondents

Sectors Covered: FMCG, Telcom, e commerce, Media, Auto, Insurance, Banking, Manufacturing

Roles: CEO, VP, Directors, Senior Managers & Junior Managers

Department: Marketing, Sales, Research, Media, Innovation, Finance & Product Development

FW Timeline: 29th – 30th March

In addition to our research this document summarizes findings from various data sources and reports





1

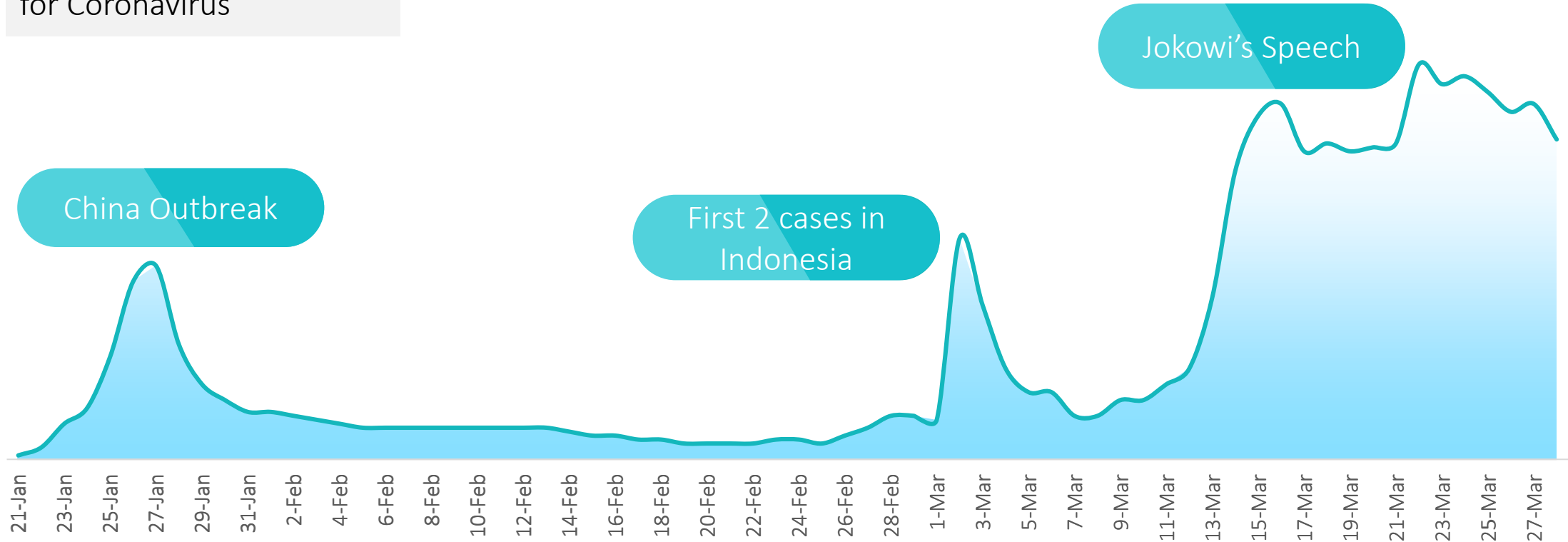
CONSUMER SENTIMENT

Executive Summary

- Anxious but Optimistic consumers
 - Impact will last for 2 months
- Worried about financial stability
 - Economy
 - Financial Stability
 - Ostracized
 - Saving more
- Social conversations about Coronavirus started early March following Outbreak in China

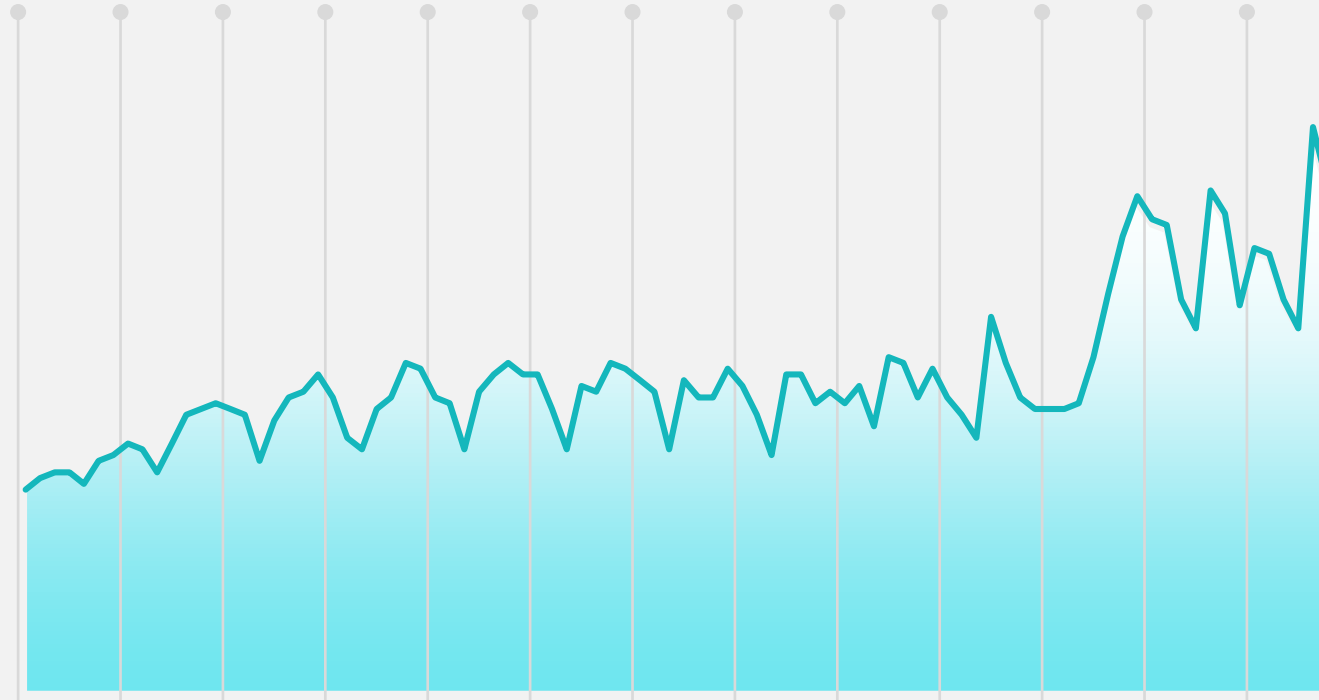
Coronavirus search peaked 3rd week of March

Indonesia Search Trends for Coronavirus



A Trial From God For Indonesians COVID-19 is an opportunity to get Closer to the God

Google Trends – Religious Searches/ God/ Allah



2-Jan 9-Jan 16-Jan 23-Jan 30-Jan 6-Feb 13-Feb 20-Feb 27-Feb 5-Mar 12-Mar 19-Mar 26-Mar



Tetangamu
@fridaazhr

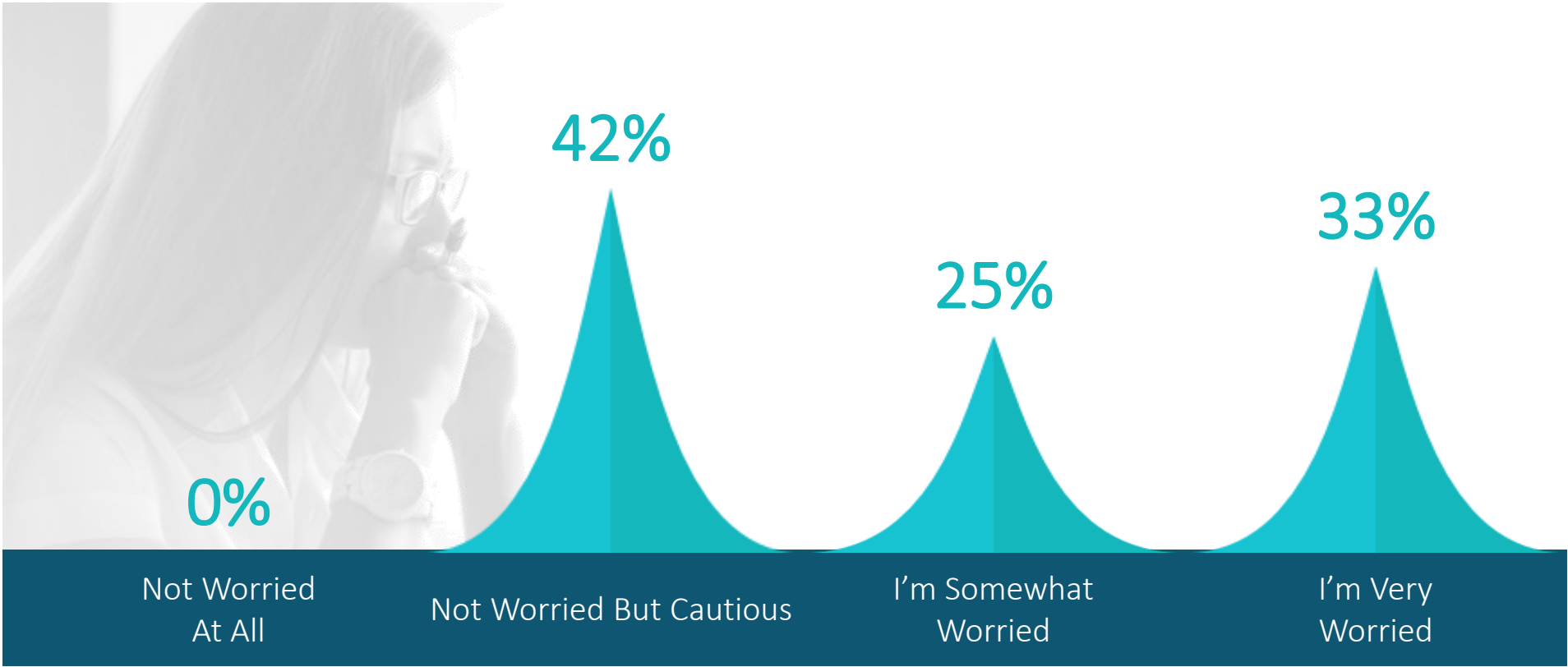
Jangan lupa berdoa, teruslah mendekatkan diri pada Allah, dan yakin bahwa virus corona akan segera hilang atas kehendakNya. #CoronaIndonesia

[Translate Tweet](#)

9:12 PM · Mar 18, 2020 · [Twitter Web App](#)

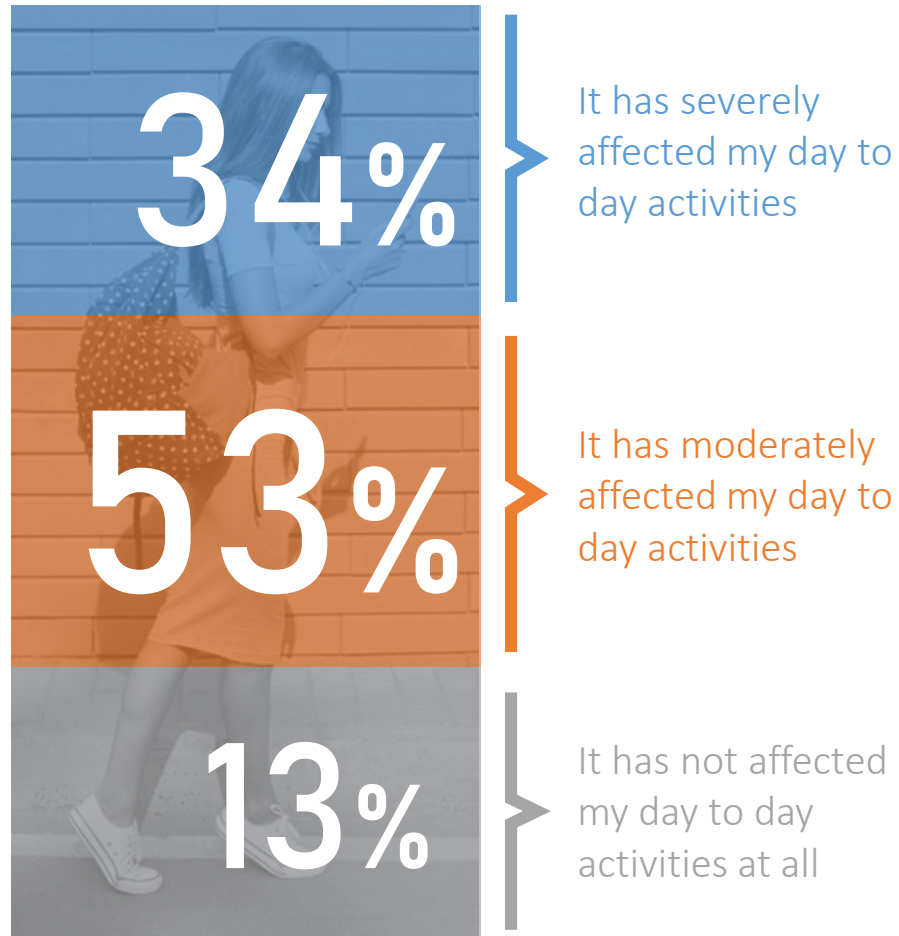
“Do not forget to pray, keep getting yourself closer to Allah and believe that this Corona virus will disappear by his will.”

More than half show sign of worry due to COVID-19 Outbreak

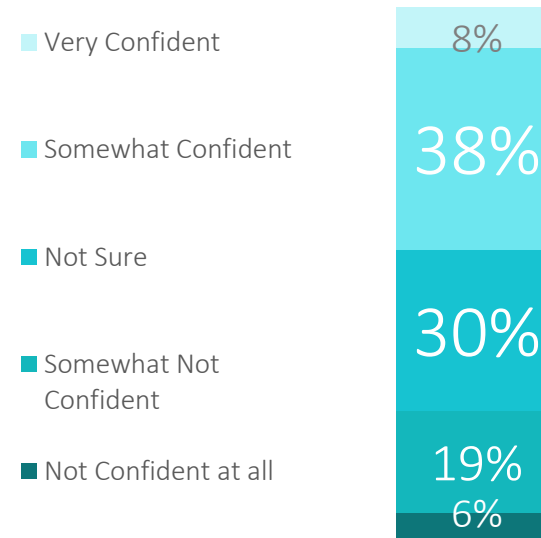


COVID-19 has severely disrupted consumers' life & confidence

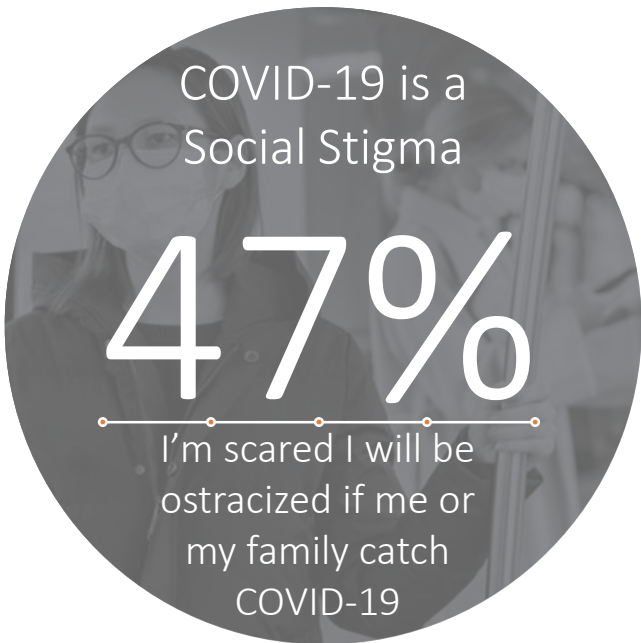
Impact on Daily Activity



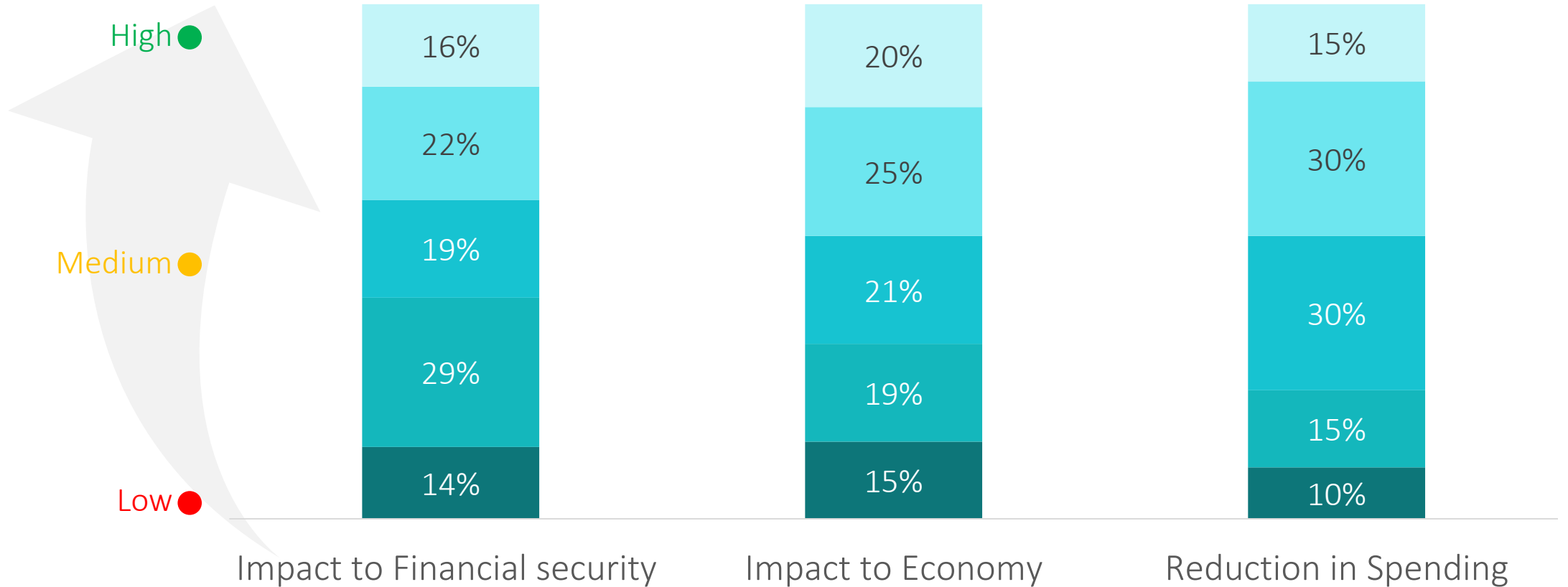
Consumers have varying level of confidence on situation normalization



Biggest fears of consumer are about health, essential supplies and social risk due to COVID-19



Consumers are concerned over Impact on Economy, Financial security and are Saving more



Quiz Time #1

Do you think COVID-19 impact will fade away and situation will normalize in 2 months?

- Yes 43%*
- No 57%*

Please use Poll Option on your screen to answer.

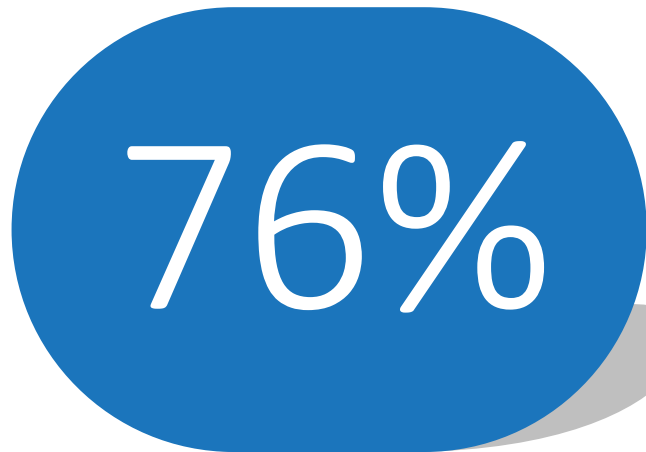
***Poll results during live webinar**

 2

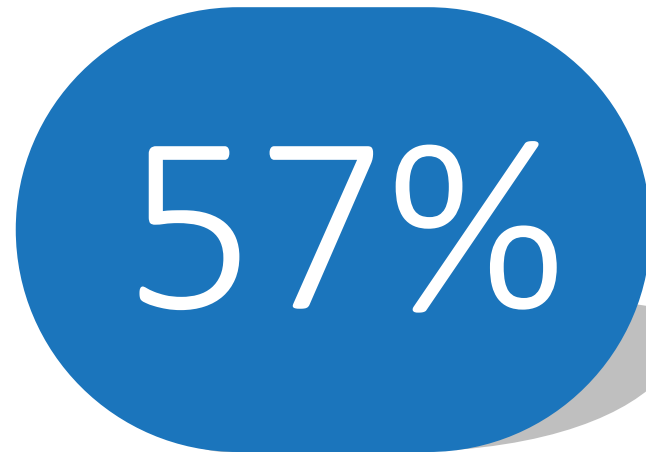
BUSINESS SENTIMENT

COVID-19 has shaken businesses

Severe Disruption to
Business' Daily Activities



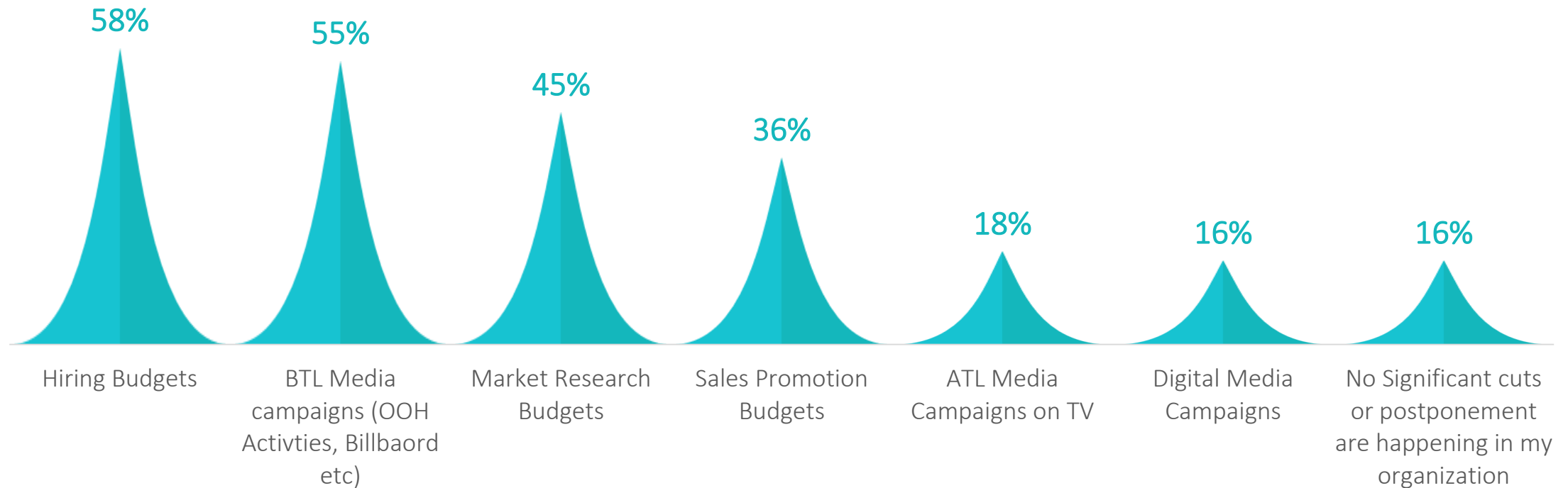
Our Revenue is
down



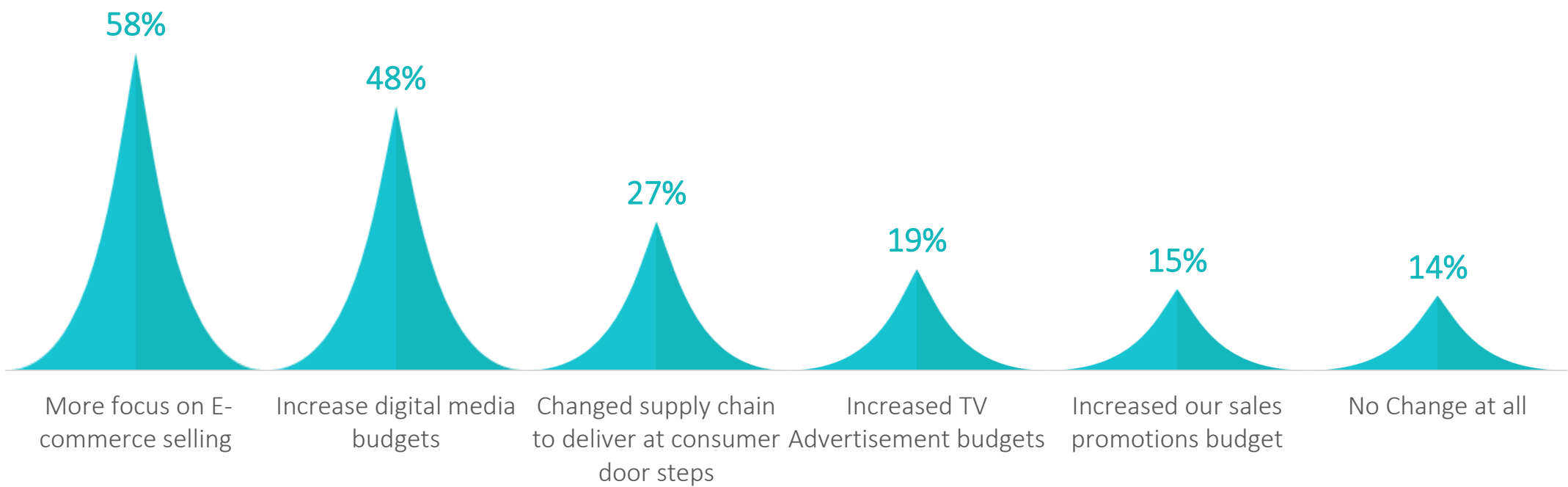
Expected time to
normalize



Hiring, BTL Campaigns and Research Budgets have taken huge cut



Focus shifting towards E-Commerce Sales and Digital Media



Quiz Time #2

In your opinion should clients spend more on Digital Media in near future (next 3 - 6 months)?

- Yes 82%*
- No 18%*

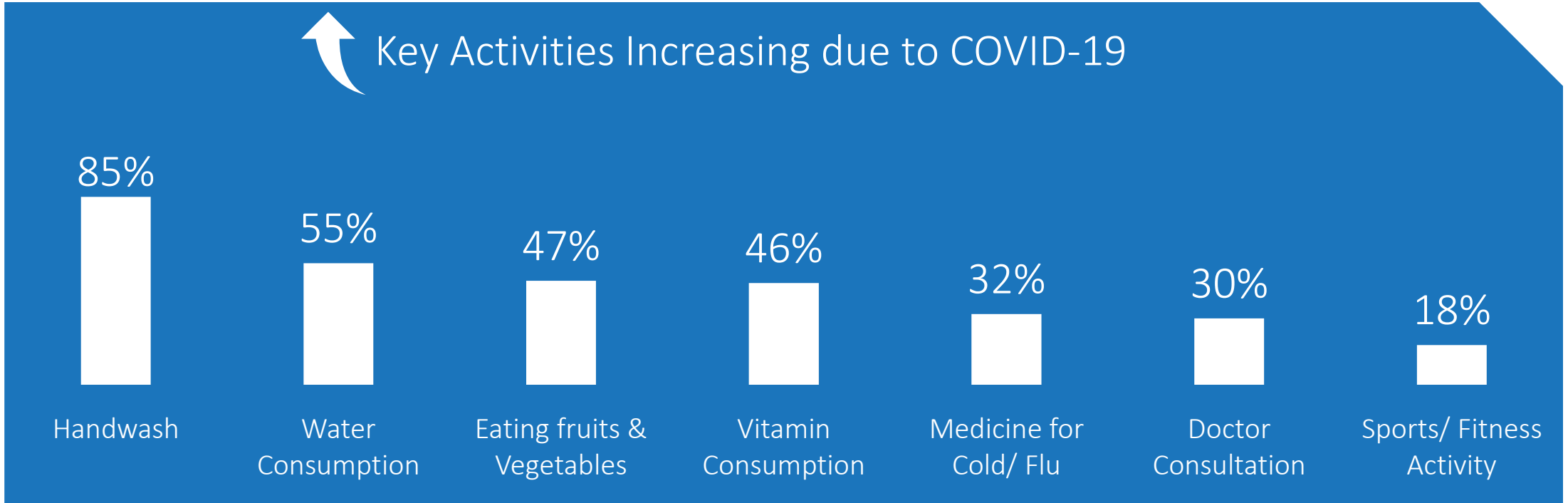
Please use Poll Option on your screen to answer.

***Poll results during live webinar**


 3

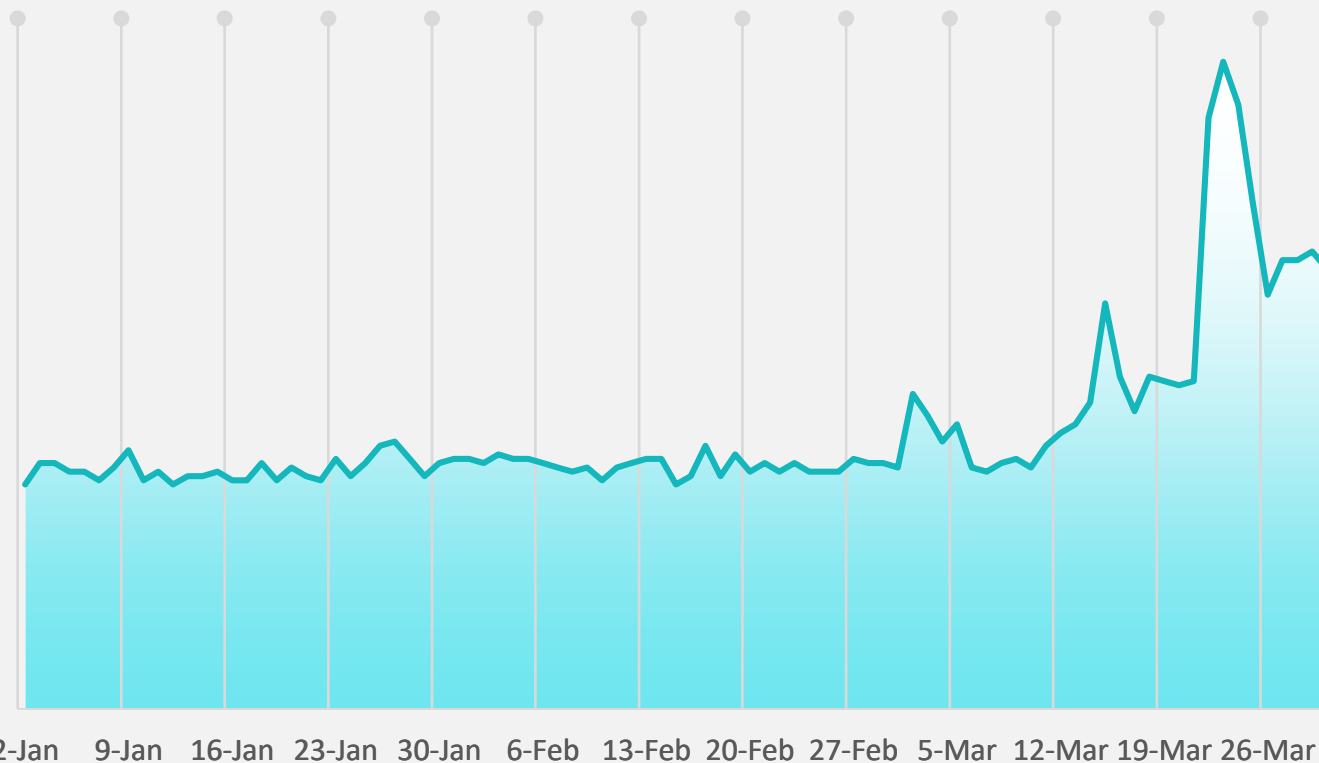
CONSUMPTION BEHAVIOR

Consumers are shifting towards more health & hygiene focused lifestyle



Immunity has become a popular social topic

Google Trends – Immunity



X   @LFC_Erik

kondisi keadaan seperti ini harus atur pola makan, istirahat, nyetok obat spt vit. dll agar daya tahan tubuh kuat... apa lg kerjanya sbg tenaga medis yg g bisa #WorkFromHome 🤒

Translate Tweet
12:27 PM · Mar 19, 2020 · Twitter for Android

“In this kind of situation, we need to have a proper diet, stock up vitamin to ensure we have good body endurance”



 **somebody who loves you**
@simangunsongptr

Replying to @underratweets

Saya juga jadi nyetok apel, bear brand.

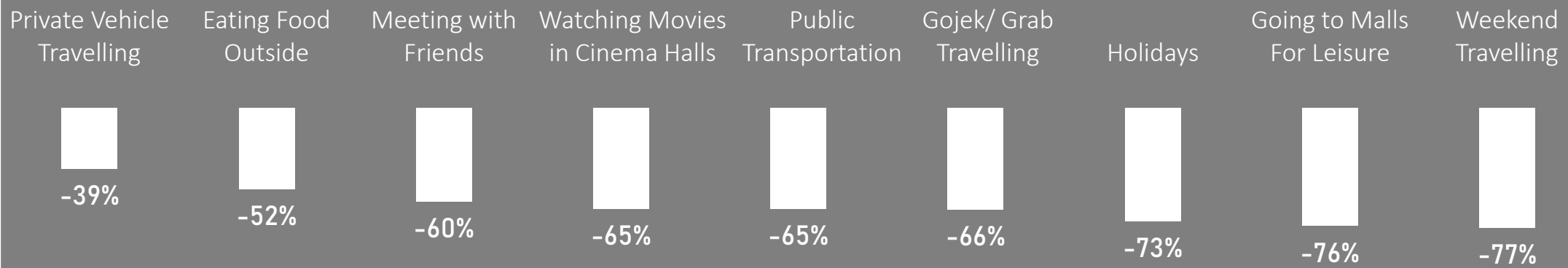
Translate Tweet
9:48 PM · Mar 16, 2020 · Twitter for Android

“I also ended up stocking up apple & bear brand

Social Life, Leisure outside home, Transport and Travelling have reduced

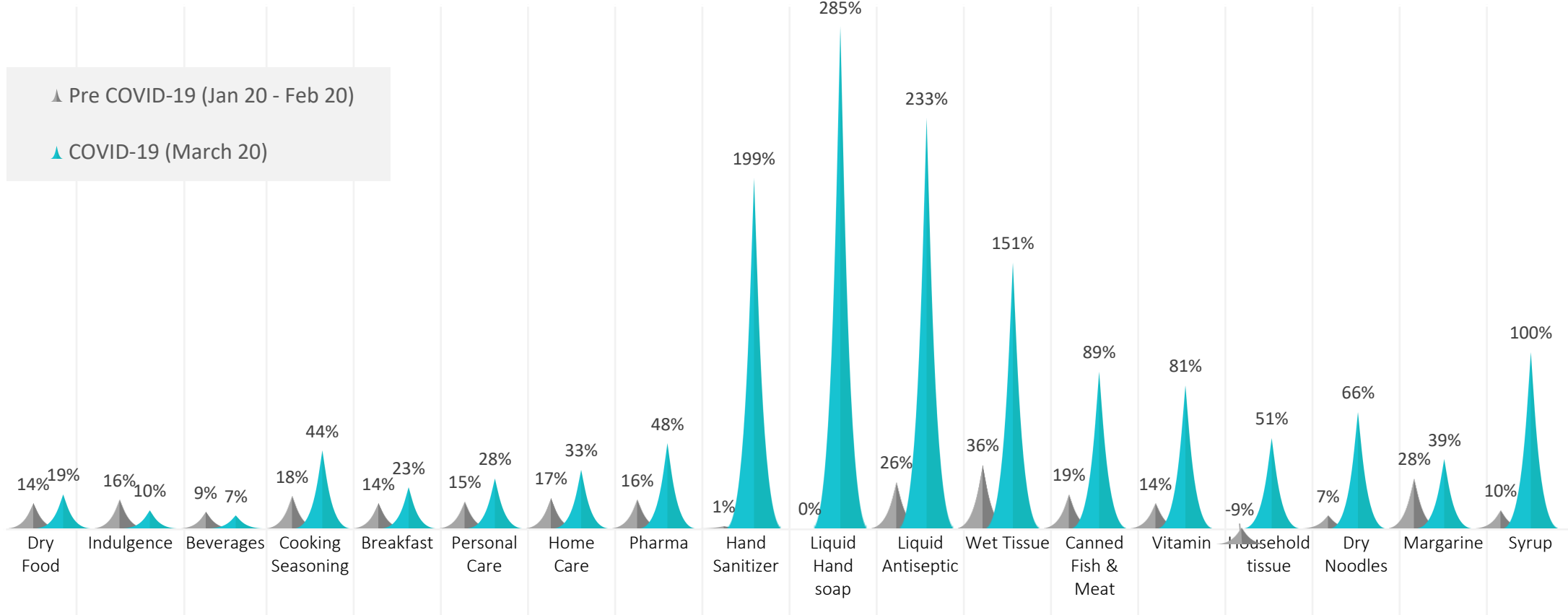


KEY ACTIVITIES DECLINING



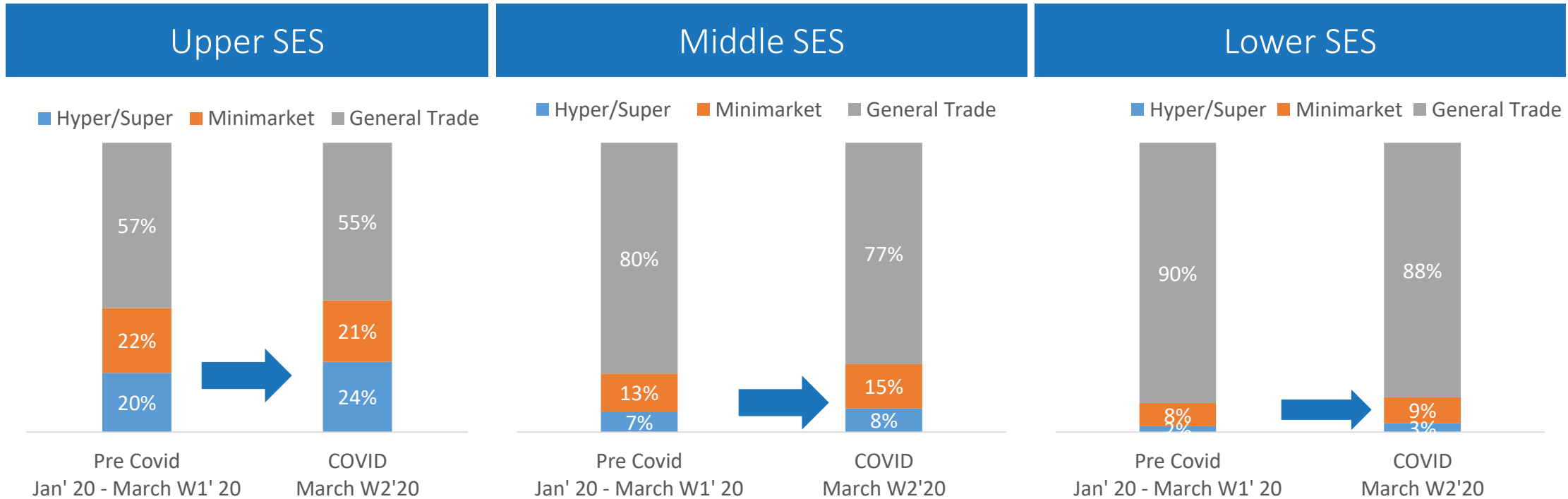
Consumption/Usage and Stocking Up is Increasing for Essentials and HH Products

Value Growth vs one Year Ago



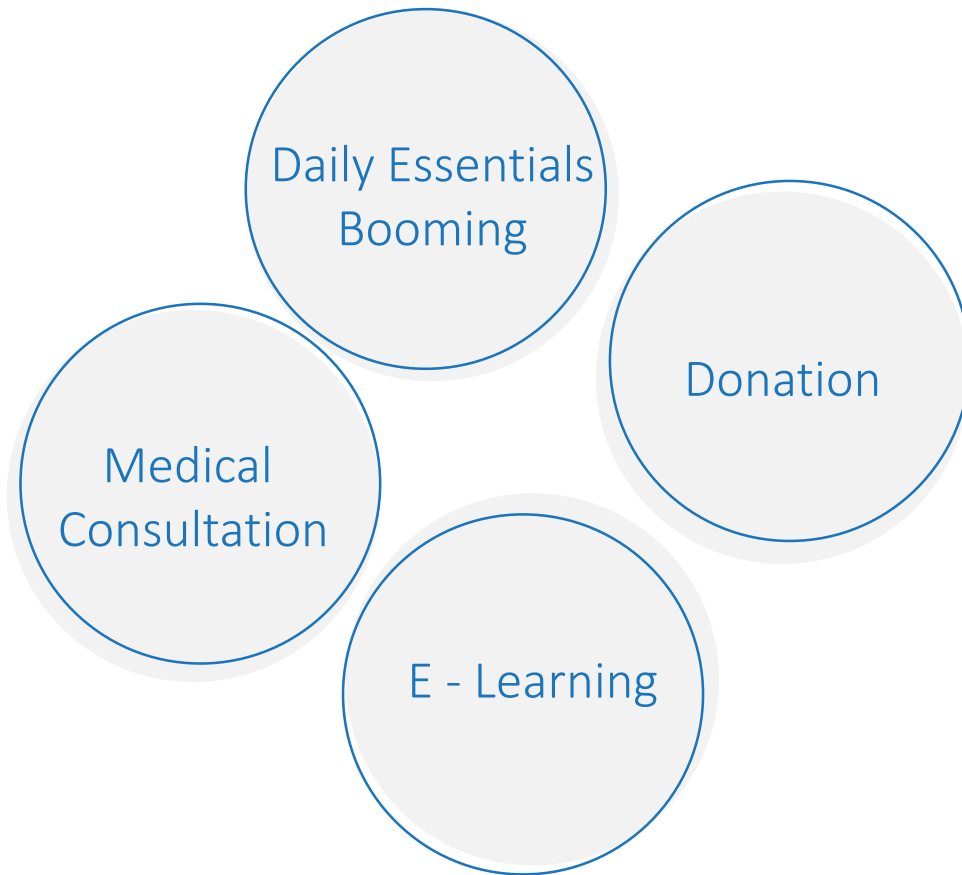
Majority of the Stocking up has happened in Modern Trade

Indonesia National Sales - Share of Channel



Online Behavior has changed hugely

What's going up?

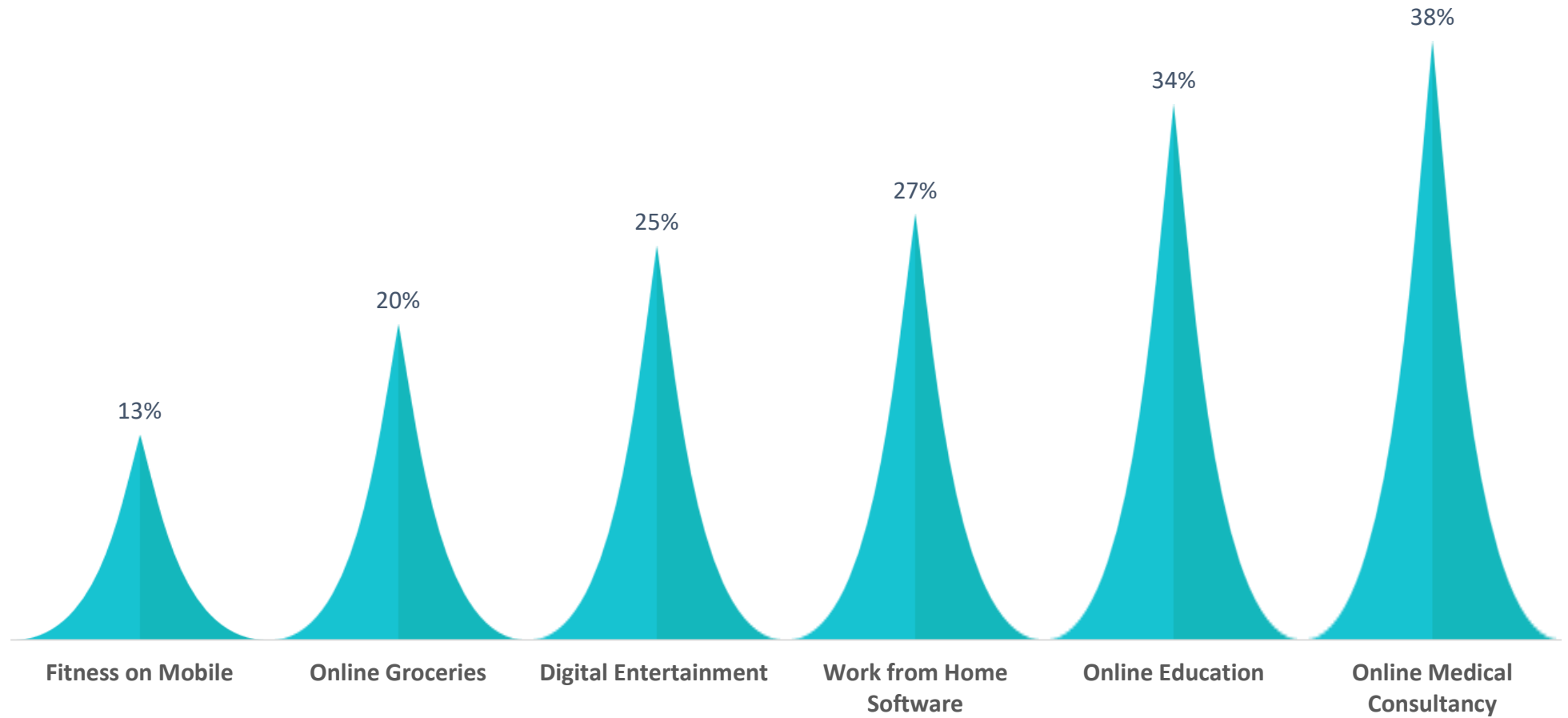


What's going down?



Rise of new digital categories, 70% consumers entering at least 1 new category

% Percentage of consumer trying the category for first time due to COVID



Quiz Time #3

Post COVID-19, do you think consumers will continue to buy more FMCG products Online?

- Yes 72%*
- No 18%*

Please use Poll Option on your screen to answer.

***Poll results during live webinar**

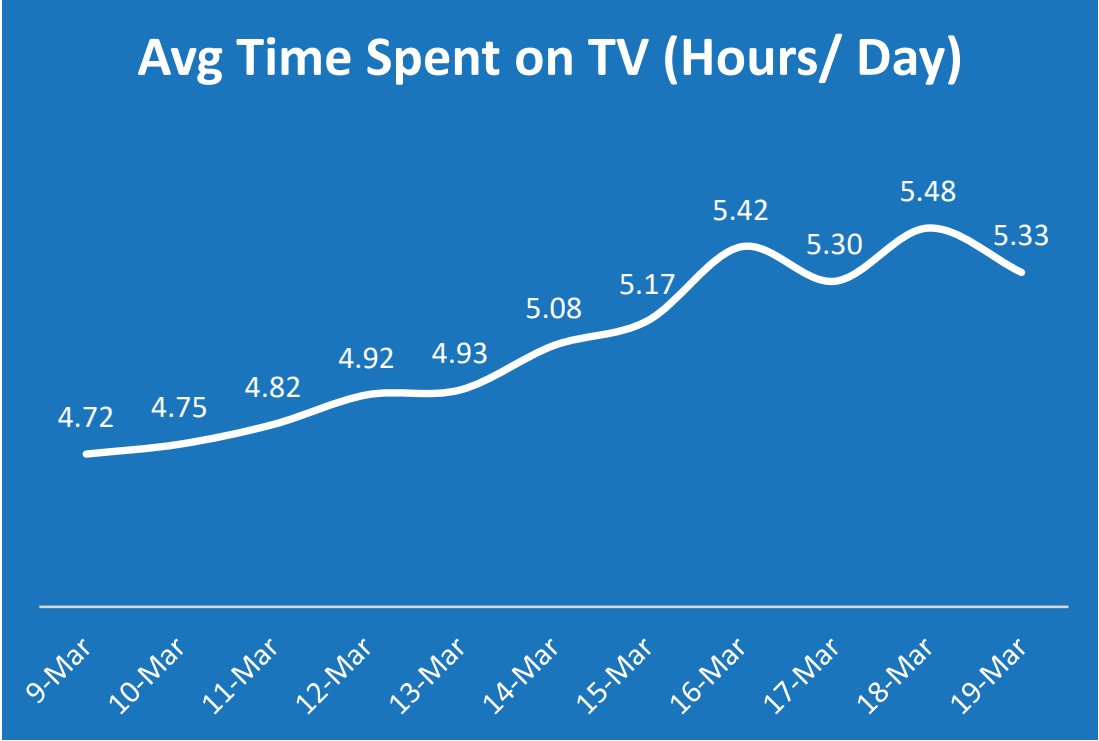
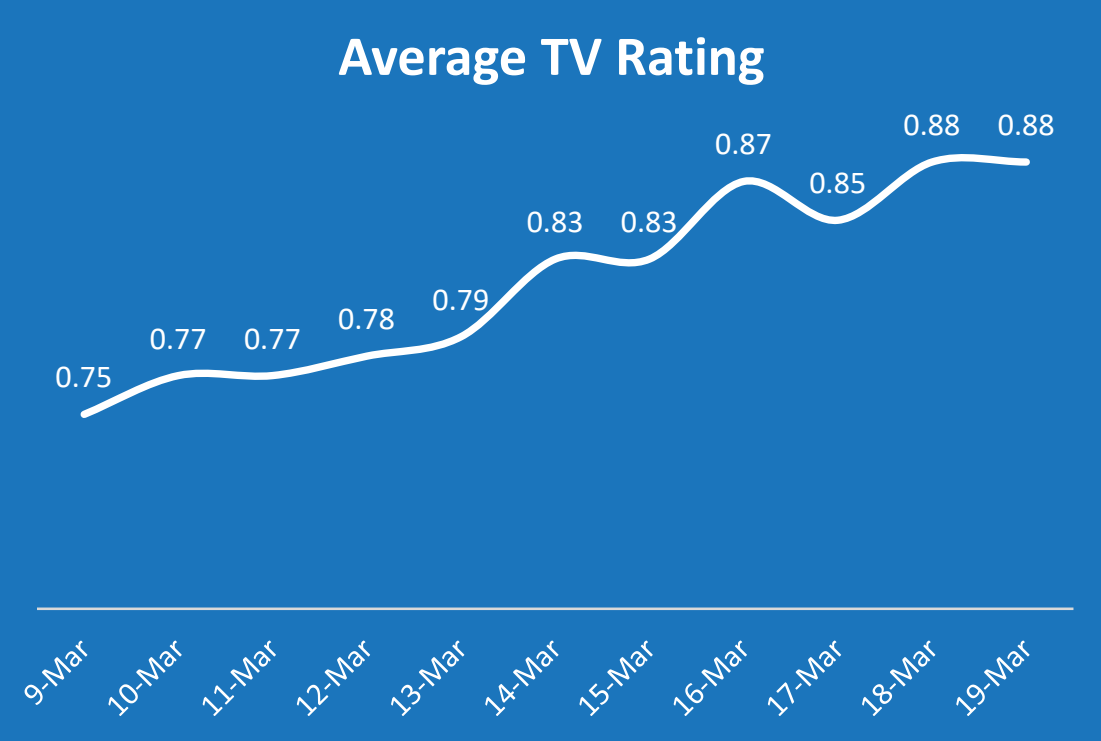
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MEDIA BEHAVIOR

Executive Summary

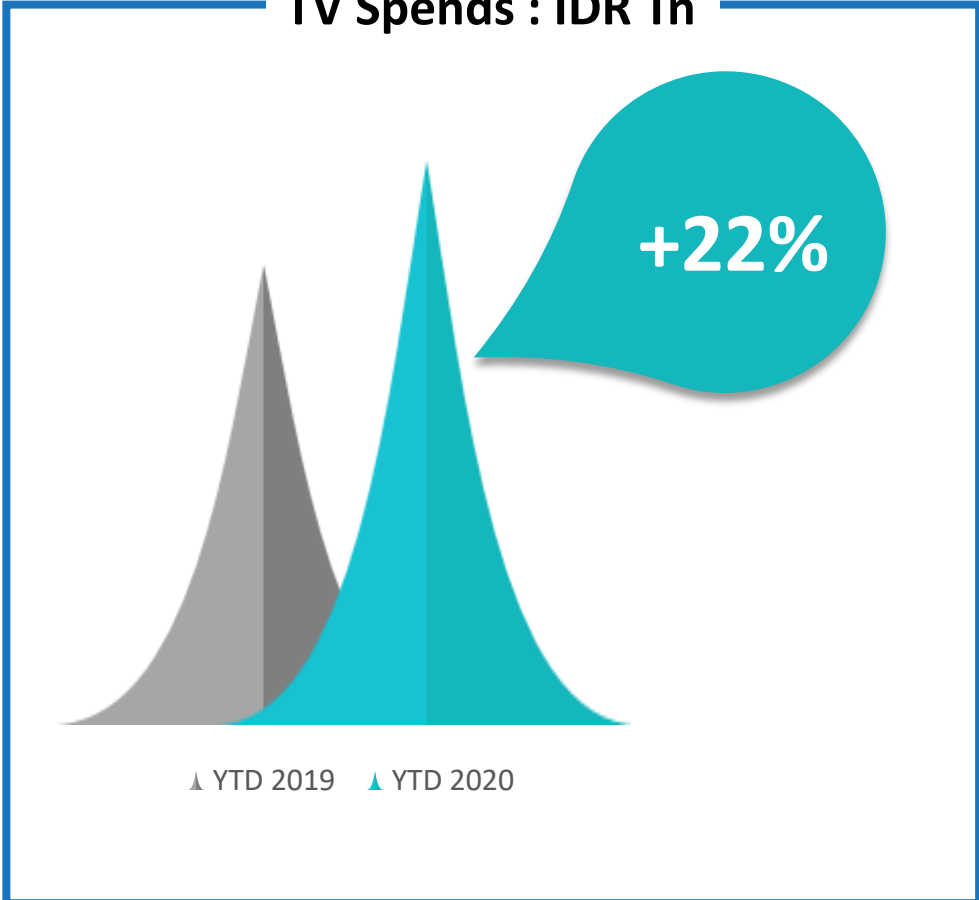
- At home consumers
 - Increased time spent on TV
 - Children Programs, Series and News genre on rise
- Online Media Habits is on rise
 - Social Media
 - Video Streaming
 - Gaming
 - Grocery Apps
 - Education
 - News
 - Online Productivity App usage

As consumers remain inside home TV is back at center stage



Upsurge in TV Spends driven by Essentials & Pharma

TV Spends : IDR Tn

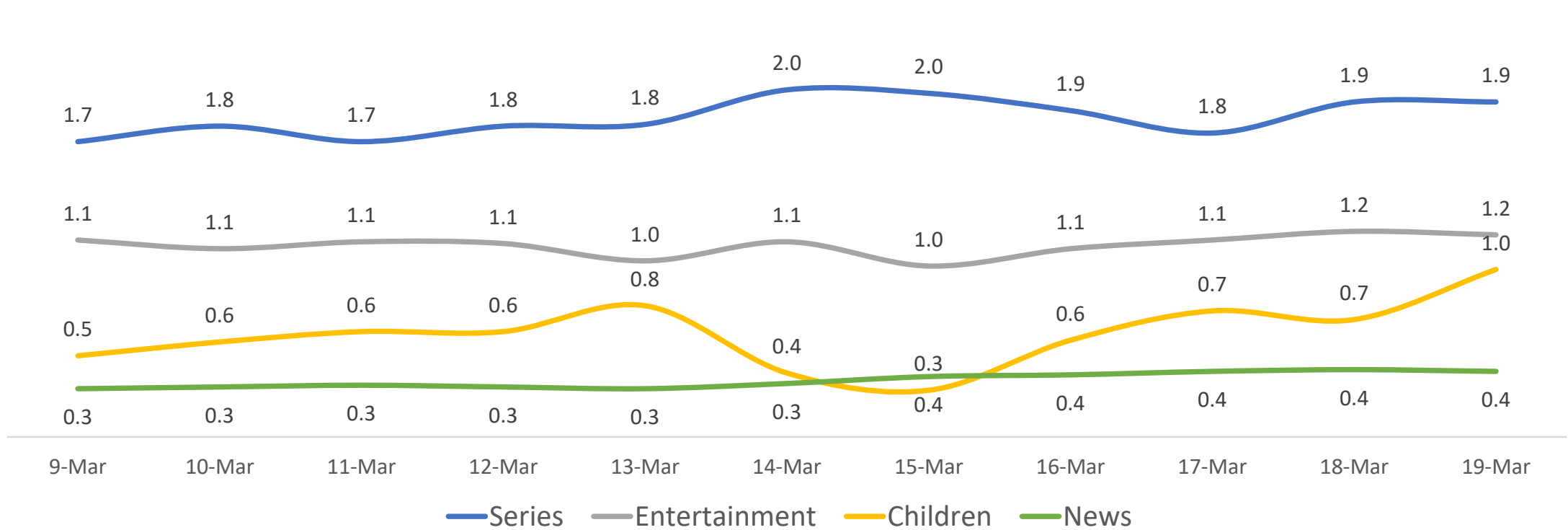


Sector wise growth YTD

TOILETRIES & COSMETICS	59%	COMMUNICATIONS	11%
FOOD	28%	HH PRODUCTS	24%
BEVERAGES	28%	TOBACCO	-13%
MEDICINES/PHARMA	12%	BABY & MATERNITY	-5%
SERVICES - RETAIL	3%	TRANSPORT, TRAVEL	22%
HH EQUIPMENT	39%	FINANCIAL	22%
AUTOMOTIVE	-31%	APPAREL	-3%
INDUSTRIAL PRODUCTS	-15%	SERVICES - PROPERTY	-59%


Children shows and Series followed by News have seen highest growth

Average TV Rating



Gaming & Entertainment on rise

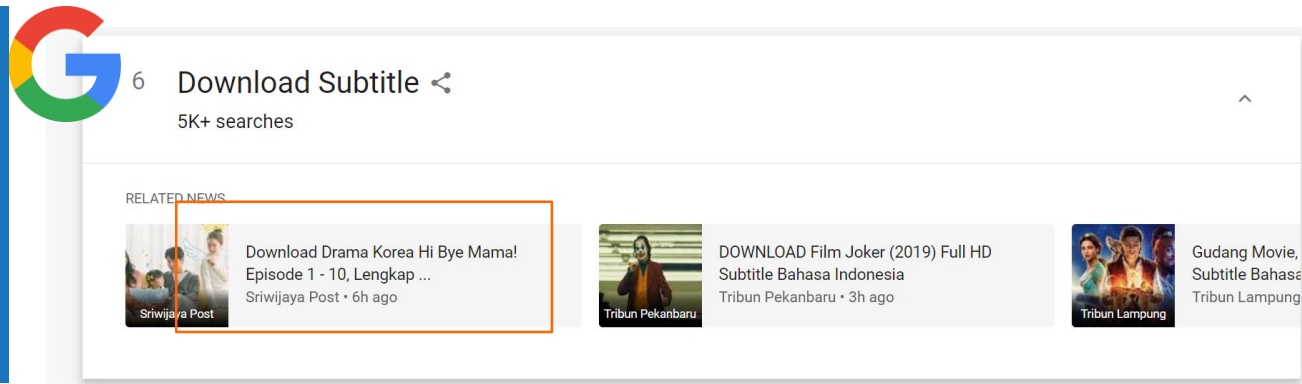
Gaming Apps and Simulation based games are getting maximum traction



App	Publisher	Category	Usage Rank	Change
1 Google Classroom	Google LLC	EDUCATION	880	+105
2 Snake Zone: Worm Mate Zone Crawl Cacing.io 2020	Izee Games	SIMULATION	535	+41
3 Sharpen Blade	ZPLAY Games	SIMULATION	979	+32
4 Ruangguru - One-stop Learning Solution	ruangguru.com	EDUCATION	677	+19
5 Slap Kings	Lion Studios	ACTION	585	+11
6 Little Big Snake	LittleBIGsnake	CASUAL	327	+10
7 Draw Climber	VOODOO	ARCADE	371	+10




Change in rank

More searches for Korean and Hollywood Movies



6 Download Subtitle
5K+ searches

RELATED NEWS

-  Download Drama Korea Hi Bye Mama! Episode 1 - 10, Lengkap ...
Sriwijaya Post • 6h ago
-  DOWNLOAD Film Joker (2019) Full HD Subtitle Bahasa Indonesia
Tribun Pekanbaru • 3h ago
-  Gudang Movie, Subtitle Bahasa ...
Tribun Lampung

Online learning apps & Office Productivity Apps are on rise

Top google search topic in last 1 week






Indonesia 3/15/20 - 3/22/20 All categories

Search topics ? Rising ↓ ↔ ↻






1	Google Classroom - Topic	+2,200%
2	Classroom - Topic	+900%
3	Hand sanitizer - Topic	+450%
4	Corona - Topic	+450%
5	Cubit - Topic	+400%

Top rising apps on google play store

New in Top 100 List ?

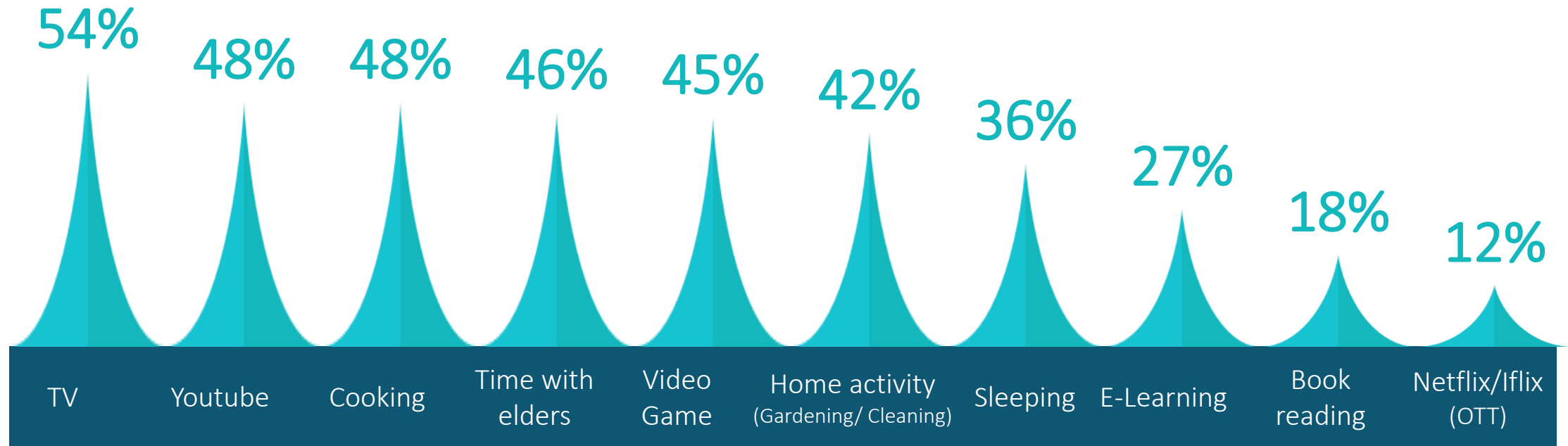
App ?	Usage Rank ?	Store Rank ?
 Google Classroom	-	1
 Ruangguru - One-stop Learning Solu...	-	3
 ZOOM Cloud Meetings	-	5
 Slap Kings	-	13
 Edmodo	-	25

New in Top 100 List ?

App Store ?	Store Rank ?
 ZOOM Cloud Meetings ?	1
 Hangouts Meet by Google	3
 Ruangguru – App Belajar No.1	4
 Microsoft Teams	9
 Google Docs: Sync, Edit, Share	10

At Home means more Entertainment and Self development

Increase in Activities At Home (% of consumers)



Quiz Time #4

Post COVID-19, do you think Online Education will keep on increasing?

- Yes 70%*
- No 30%*

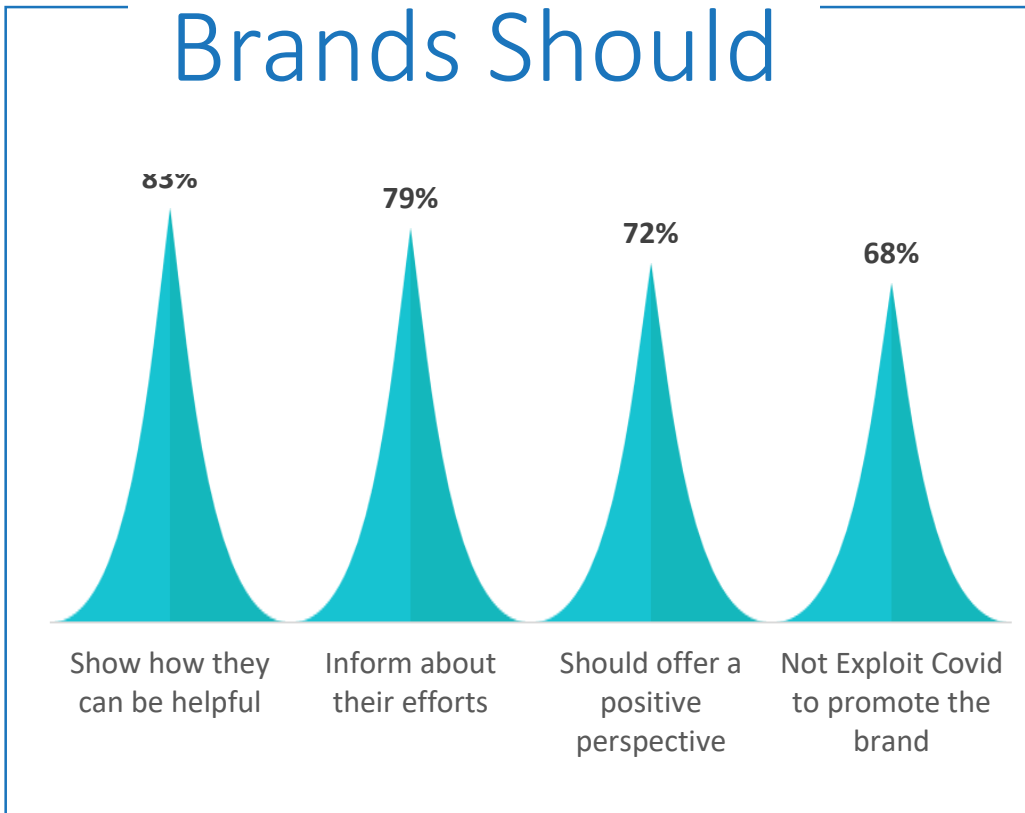
Please use Poll Option on your screen to answer.

***Poll results during live webinar**


 5

HOW BRANDS ARE RESPONDING TO COVID-19

Consumers want brands to be trustworthy and not to be greedy



Brands helping people to face truth without Panic



halodoc | KEMENTERIAN KESEHATAN REPUBLIK INDONESIA | gojek

CEK RISIKO COVID-19 DAN PENANGANANNYA DARI RUMAH

Berikut langkahnya:

- 1 Cek faktor risiko di aplikasi Halodoc (menu: COVID-19)
- 2 Dapatkan hasil kategori: Risiko Rendah, Sedang, dan Tinggi
- 3 Verifikasi risiko dengan tanya dokter berpengalaman Halodoc, GRATIS di kategori COVID-19
- 4a Kategori rendah dan sedang:
 - Diarahkan untuk karantina di rumah
 - Diberikan rekomendasi obat
 - Obat diantar ke rumah oleh Gojek
- 4b Berdasarkan hasil verifikasi, dokter akan mengarahkan pasien ke rumah sakit terdekat

Tanya Dokter Kapanpun, Obatnya Langsung Diantar
#DiRumahAja

Available on the App Store | GET IT ON Google Play



Layanan Resmi Konsultasi Online COVID-19

Hanya di **GrabHealth!**

GrabHealth | Good Doctor | KEMENTERIAN KESEHATAN REPUBLIK INDONESIA

KESELAMATAN & DAMPAK SOSIAL March 23, 2020

GrabHealth powered by Good Doctor Dipercaya Kementerian Kesehatan untuk Melaksanakan Screening COVID-19 Resmi via Telekonsultasi

Sebagai langkah nyata untuk memerangi COVID-19, hari ini Grab Indonesia dan Good Doctor Technology Indonesia (GDTI) menandatangani Perjanjian Kerja Sama dengan Kementerian Kesehatan untuk menghadirkan layanan khusus pemeriksaan (screening) awal COVID-19 melalui tanya jawab online (telekonsultasi) di platform GrabHealth powered by Good Doctor.

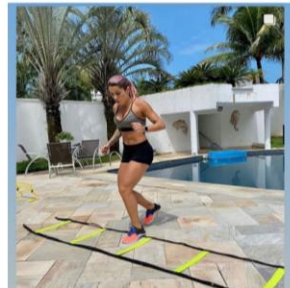
HaloDoc and Grab Health providing people access to doctors online to consult on health conditions and symptoms of the corona virus (COVID-19) without the need to leave home

Use situation to brand advantage

Nike

**IF YOU EVER DREAMED OF PLAYING
FOR MILLIONS AROUND THE WORLD,
NOW IS YOUR CHANCE.**

Play inside, play for the world.



RuangGuru gave free access for student for few weeks



Respon Situasi COVID-19,
Ruangguru Buka
Sekolah Online Ruangguru Gratis,
Siswa Bisa Belajar di Mana Saja

Internet offer details:
Bebas Akses Ruangguru
30 GB
30 HARI 30 GB
Rp 0
Beli

Be Agile

AGILE BRAND INITIATIVES – GRAB & GOJEK FOOD

- To support social distancing appeal by the government, GrabFood had immediately initiated 'Contactless Delivery Service' which required Grab driver to drop consumer's food in 2-meter distance and use an envelope for cash payment

BRAND POST

Grab Indonesia @GrabID

Aku mau ngasih tau info penting nih. Buat kalian yang lagi Social Distancing, GrabFood punya layanan baru. Namanya:

Pengiriman Tanpa Kontak

Simak utasan ini lebih lanjut, yuk! Jangan lupa bantu sebarin.

- A T H R E A D -

Translate Tweet
11:24 AM · Mar 17, 2020 · Twitter Web App

2.6K Retweets 10.7K Likes

TESTIMONIAL

Mi @Riistaaa

Replying to @GrabID

Min gimana? Gimanaa? Keren banget Grab gecep ambil inisiatif

Translate Tweet
11:29 AM · Mar 17, 2020 · Twitter for Android

174 Likes

Grab Indonesia @GrabID · 22h

Replying to @Riistaaa

Terima kasih Kak. Ini salah satu bentuk upaya Grab untuk bisa menghentikan penyebaran COVID-19. Sehat selalu dan jangan lupa cuci tangan ya Kak.

6 1 231

dr. Gia Pratama @GiaPratamaMD

#JanganPanikIngatBAIK

B: Biasakan cuci tangan dgn sabun+air mengalir min. 20 dtk

A: Awas jgn sentuh mata hidung mulut sbm cuci tgn/bila tgn kotor

I: Ingat etika bersin, pakai masker jika sakit

K: Konsultasi ke Good Doctor di GrabHealth terkait COVID-19 ke

Translate Tweet

Layanan baru agar kamu sehat selalu

GrabHealth | Good Doctor

Memperkenalkan GrabHealth powered by Good Doctor | Grab ID

Sejak pertama kali hadir, kami selalu mencari cara untuk mengantarkan yang baik melalui berbagai layanan langsung di dalam aplikasi Grab kamu. Kini bersama ...

10:27 PM · Mar 15, 2020 · Twitter for Android

33 Retweets 53 Likes

MEDIA GROUP NEWS

METRO TV KOMPAS INDONESIA ID.11

BERSATU MELAWAN VIRUS CORONA

e-money GO PAY OVO

BELANJA AMAN TANPA UANG DI TANGAN

Pandemi virus corona membuat orang-orang untuk meminimalisir aktivitas di luar ruangan dan kontak fisik. Namun, orang sangat membutuhkan kemudahan bertransaksi. Untuk itu, bertransaksi secara digital dengan melakukan transaksi pembayaran dengan uang tunai. Saat kondisi seperti ini, metode pembayaran cashless adalah lebih aman dan nyaman digunakan. Karena tidak menggunakan uang tunai dan mengurangi kontak fisik dengan orang lain.

PSA: Belanja Aman Tanpa Uang di Tangan, merupakan layanan ber-basis app digital yang memudahkan informasi mengenai komodalitas dan kenyamanan bertransaksi cashless dalam mengurangi kontak fisik dan mengurangi penyebaran virus corona di Indonesia.

MGN INTEGRATED COMMUNICATION SOLUTION

SPECIAL CONTENT ON: PSA SERIES | Belanja Aman Tanpa Uang di Tangan.

Advertorial Platform Ekonomi Native Gateway MEDIAINDONESIA.COM #cekdulu medcom

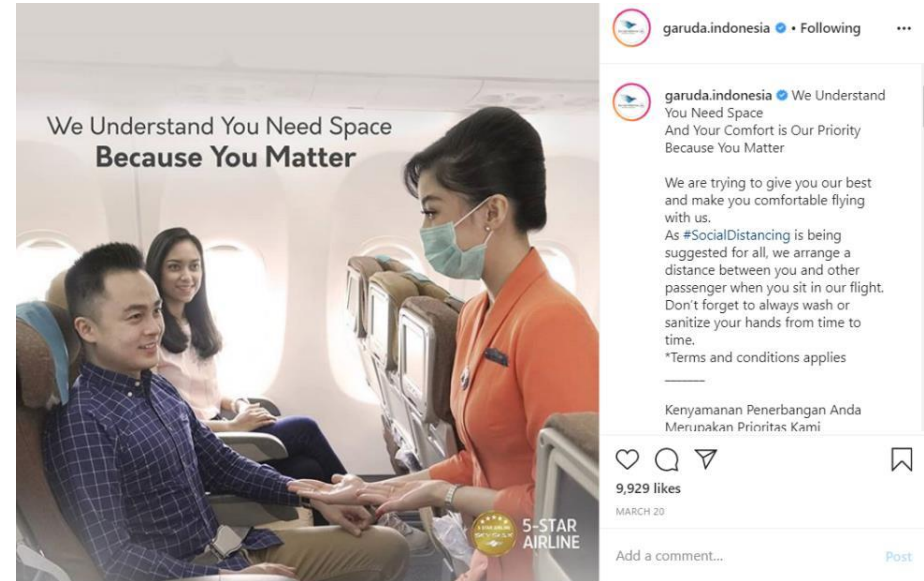
[MARKETING - MGN 2020]

Bring Society Together

McDonalds Social Distancing



Garuda Social Distancing




 6

OPPORTUNITIES AHEAD

Areas

Health

Consumption
Habits

Change in
Behaviour

- Personal Hygiene is on rise
- E-consultations is on rise
- Vitamins and Herbal are on rise
- Fruit and Vegetables on rise

- Online Grocery is on rise
- Online Shopping on Electronics and Fashion is softening
- Indulgence in softening

COVID impact in Indonesia

Areas

Media Habits

Work & Education

Change in Behaviour

- Increase in consumption of TV especially kids programs, `news and movies
- Increase in Online Media: Streaming, Games and Social media
- Consumers 'open' and actively searching for health-related information

- Increase in Online Work Productivity apps
- Shift to e-learning
- Increase in app-based learning technology platforms

So What's Next for Marketers During COVID-19?

1

Maintain Brand Saliency.
Identify High ROI Channels

2

SKU optimization
In-store and Online

3

Spend Smartly & Prioritize

- And continuously understand shift in consumer behavior

4

Build Growth With
Online Sales

5

Optimize UI/UX of
E-commerce
app/website

6

Activate brand purpose
to support society,
educate on hygiene and
cleanliness

7

Be careful not to
sound opportunistic.

QUESTIONS?

Upcoming MMA Webinars

- **April 8** - Perspectives on Covid-19 and implications / learning for consumer and retail companies by McKinsey in association with MMA
- China Advertising story: During and After Covid-19
- Blockchain
- Understanding the Changes in Consumer Behavior During a Pandemic
- China Martech

Take a Seat at the Table

MMA programs and working groups consist of executives who discuss key issues for a specific industry segment, technology or business issue. The programs and working groups meet on an ongoing basis to develop and execute industry initiatives that reflect the needs of their initiative area and membership.

**Attribution
Analysis**



**Currency
Measurement**



Internet of Things



Location



**Mobile
Messaging**



**Mobile Native
Advertising**



**Mobile
Programmatic**



**Mobile Shopper
Marketing**



Mobile Video



Privacy



To join a program, contact committees@mmaglobal.com.



Thank You!