



BEYOND JAMU

DESIGNING NEW WAYS FOR AFFLUENT INDONESIANS TO
REJUVENATE, RELAX AND SEEK RELIEF

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FOREWORD

Asia's present economic growth and the tandem rise in demand for products, services and experiences offer Singapore enterprises many opportunities for business and innovation. Rising affluence and rapid urbanisation will increase both the need for well-designed solutions in everyday lives and awareness towards health and wellness.

At DesignSingapore Council, we believe that design should evolve from an understanding of the users' needs, wants and desires. This will create solutions that are relevant and set the groundwork for successful commercialisation. Design ethnography is an effective way to gather deep qualitative insights into the habits and behaviours of users. It usually kick-starts the design process with a question: "What is it that our users really need?"

To allow enterprises to better understand and translate the untapped needs of Asian consumers, we introduced the Asian Insights and Design Innovation (AIDI) programme. AIDI is one of the pioneering attempts in the world to capture Asian consumer insights for the Asian market.

In this book, we will illustrate the human-centred design thinking process, as well as spark ideas among enterprises in the sectors of consumer health and wellness, food and beverage and retail through user insights, personas and design concepts. Through this publication, I also hope that Singapore enterprises will gain a better understanding of how Indonesians relax, seek relief and rejuvenate, and be inspired to design solutions that are appropriate to the Asian markets.

Jeffrey Ho

Executive Director

DesignSingapore Council

IS THIS BOOK FOR YOU?

You are a business that offers products and services around health and wellness and are interested to expand into Indonesia, but want to do so strategically because you have limited resources.

You know that Indonesia has many more opportunities for your business, but you do not know where to start.

You want to understand how and why middle to upper class Indonesians do what they do when they seek relief, relaxation and rejuvenation.

You want inspiration on how you can offer them a product or service that matches their needs.

If you are all of the above, or even some of the above, then this book is for you.

INTRODUCTION

IN 15 YEARS, INDONESIA'S CONSUMER CLASS WOULD TRIPLE.

It is time to listen to Indonesia's rising affluents. Urban, trendy and optimistic¹, this demographic is keen to spend beyond their basic needs. Gross domestic product is already growing at a steady rate of more than 6 percent a year³. Indonesia's consumer class² could triple to 135 million by 2030, to become the third largest middle class after China and India, boosting sales of everything from cars to smartphones, airline tickets to fast-moving consumer goods, providing business opportunities in the consumer sector worth an estimated S\$1.38 trillion³.

Indonesia's economic outlook in the next few years is expected to remain positive. Expectations are high for President Joko 'Jokowi' Widodo to introduce economic reforms that would attract foreign investors. With greater regional economic integration when the ASEAN Economic Community kicks in in 2015, the potential business opportunities for the Indonesian market are vast.

Rising urbanisation has also created new centres of consumerism. While the middle-upper income group is mainly found in Jakarta, cities like Medan and Surabaya are experiencing rapid growth in middle-lower

income segments, offering opportunities to gain a foothold in market share. By 2030, they could account for 27 percent of Indonesia's GDP⁴.

THE IMPORTANCE OF DIET AND HEALTH ARE BEGINNING TO ENTER INDONESIAN'S MINDS.

Awareness of healthy lifestyle and diet are increasing, with impact on eating and spending patterns. The Indonesian government has recently introduced the notion of Universal Healthcare coverage, setting the scene for a new focus on disease prevention and the promotion of healthier lifestyles for Indonesians.

Health and wellness products can reap immediate economic growth for Indonesia, driven by younger consumers from medium to higher income families⁵. They are less price-conscious, more health-conscious, and are aware of global health and lifestyle trends. In 2010, 50% of 240 million Indonesians are below 30 years⁴, and the numbers will triple by 2030. Although the demographic with sufficient purchasing power to buy premium health food products is a minority, it still encompasses tens of millions of people, making up a significant consumer base⁶.

UNDERSTANDING INDONESIANS REVEALS OPPORTUNITIES FOR GROWTH.

Singapore's reputation for excellence in healthcare has always attracted Indonesians to seek medical help and services here. In 2003, they accounted for almost 50% of foreign patients⁷. However, since then, healthcare providers in the region, such as Malaysia and Thailand, have become the go-to destinations because services are relatively cheaper⁸. Singapore companies need to compete on different grounds than only price to gain the attention of Indonesian consumers.

Furthermore, relying on the domestic market for growth is not sustainable for local companies in the long run. In response to stressful lifestyles, many Singaporeans have found ways to de-stress and pamper themselves, as well as keeping themselves healthy. As a result, many manufacturers have introduced a wide range of health and wellness products leading to maturity in this category. The local health and wellness industry is also expected to see slower growth in the coming years due to slower population growth affecting sales performance⁹. Investing your money only for domestic consumers may not be the

best way to go, with 5 million Indonesians, a population the size of Singapore, entering the urban consuming class each year¹⁰.

BE A FIRST-MOVER AND CLAIM THE ADVANTAGE.

Instead of waiting for Indonesian consumers to come to Singapore, companies can find out what Indonesian consumers need and go to them. Leverage on Singapore's brand of quality, safety and reliability, and push towards making new products and services that address latent health and wellness needs of Indonesian consumers.

These unmet needs can be discovered through research methods such as design ethnography, a qualitative research approach studying and understanding users in the context of their everyday lives, with the objective of understanding the deeper reasons behind their behaviour.

The time is ripe for Singapore businesses and healthcare & wellness providers to seek opportunities in Indonesia and gain a foothold in the growing middle-class market. Be in the drivers' seat and determine what, where, and how Indonesian consumers purchase health and wellness products and services. Create this new and exciting market.

References

- ¹ Nielsen. 2013. Economic Optimism Continues Among Asia Pacific Consumers.
- ² According to McKinsey, consumers are defined as individuals earning \$10 a day or more, who therefore have enough money to spend on discretionary, not just basic, goods, and services.
- ³ International Enterprise Singapore. 2013. Indonesia's Consumer Sector: Tapping the Consumer Dollar in Food and Retail.
- ⁴ Dobbs R, Thompson F, Budiman A, 'Five Reasons to Believe in the Indonesian Miracle', Foreign Policy, 21 September 2012.

- ⁵ Agriculture and Agri-Food Canada. 2010. Agri-Food Past, Present and Future Report - Indonesia.
- ⁶ Agriculture and Agri-Food Canada. 2011. The Indonesian Consumer - Behaviour, Attitudes and Perceptions Toward Food Products.
- ⁷ Ministry of Health. 2003. Trends in Foreign Patient Admission in Singapore.
- ⁸ Euromonitor. 2014. Health and Wellness Tourism in Singapore.
- ⁹ Euromonitor. 2014. Health and Wellness in Singapore.
- ¹⁰ Rohit Razdan, Mohit Das, Ajay Sohoni. 2013. The Evolving Indonesian Consumer. McKinsey Asia Consumer Insights Center

ABOUT THIS PROJECT

Under the Asian Insights and Design Innovation (AIDI) programme of DesignSingapore Council, a project was commissioned to understand how middle to upper class Indonesians seek relief, relaxation and rejuvenation. A design ethnography study was conducted in three key cities of Indonesia - Medan, Jakarta and Surabaya. To enable Singapore enterprises to bring innovative products and services that are culture and context-specific to the Indonesian market, design ethnography was used to find out the Whats, Whys and Hows behind Indonesians' behaviour in response to stresses in their lives.

With the key findings, twelve typologies of Indonesians (known as Personas) were created, reflecting broad but distinct health and wellness attitudes and needs, useful to inform and inspire enterprises in creating meaningful new solutions for Indonesian consumers.

Key insights and Personas were used in a two-day workshop with local small and medium-sized enterprises (SMEs) looking to expand into the Indonesian market. With these different types of consumers in mind, the participants generated over 50 concepts, visualising scenarios of new products, services, and experiences that fulfilled each Persona's needs. Eight of these concepts were then further developed

by fuelfor, a design innovation consultancy specialised in health and wellbeing, to showcase the design-driven innovation process in its entirety, illustrating the range of solutions possible when using design ethnography; an approach that helps position Singapore as a leader of product and service innovation in Asia.

This publication presents the design-driven innovation journey, from the ethnographic fieldwork to articulated insights and opportunities, as well as a set of potential solutions to support the health and wellbeing aspirations of middle to upper-class Indonesians.

This project was commissioned by DesignSingapore Council under the Asian Insights and Design Innovation Programme, in collaboration with International Enterprise Singapore. All design research methods and tools, and the resulting insights, Personas and showcased concepts were developed by fuelfor.

DIAGNOSING INDONESIA



DIAGNOSE

Design ethnography has uncovered the key health and wellbeing 'pain points' that affect Indonesians, and shown how they cope with various stress factors. This diagnosis revealed key drivers for their behaviour change towards a healthier lifestyle.

VISUALISE

Creating this Wellbeing Diagram for Indonesians shows health and wellbeing is built up from multiple aspects. It reflects what wellbeing means for them distinctly, representing their own model of health where for example social and mental health are crucial.

TREAT

The 8 concepts presented in this book address the 'pain points' detected, and aim to trigger healthy behaviour change. Each concept - how it looks, what it feels like to interact with, the way it is communicated, distributed and delivered, is tuned to Indonesian needs, sensibilities and context.

A design ethnography approach therefore makes it possible to create new business value propositions that match the Indonesian consumer's habits and mindset, as well enter and evolve seamlessly into the context of Indonesian life.

WHAT DID WE DO?



1. FOUNDATION RESEARCH

Understanding Indonesia and the research brief.



2. RECRUITMENT & PREPARATION FOR FIELDWORK

Selected participants are given homework packs, including self-reporting diaries, designed to give a preliminary understanding of the themes that the team can delve and dig deeper into during fieldwork.



4. ANALYSES AND SYNTHESSES

Research data is pulled apart and regrouped to distill insights and edit 24 participant movies. Twelve personas were created based on different behaviours and motivations around health & wellbeing.

3. FIELDWORK

Twenty-four participants are interviewed at home, shadowed around their city and filmed by the team to capture deeper insights, spending more than 8 hours per participant.



5. IDEATION WORKSHOPS

Insights are shared. Participants are taken through a process of design-driven innovation, and freely design concepts in an environment of open innovation. New business opportunities, concepts and strategies are discovered.

6. STUDIOS

Companies which have identified value in the insights or concepts consult the team to leverage these results for their own business. Following creation of design briefs tailored to fit each company's Indonesia strategy, companies are encouraged to request for grants.



8. COMMUNICATION & SHARING

Insights and methodology are shared at Health Innovators Forum and Asian Insights and Design Innovation Sharing Session. This e-book of insights, opportunities and concepts is launched online.



7. CONCEPT DEVELOPMENT

Iterations of designing and visualizing new product and service propositions with 8 Personas in mind, based on selected concepts created in the Workshop.

PROJECT TOOLS

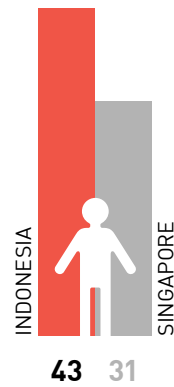


INDONESIA AT A GLANCE

JAKARTA, SURABAYA, MEDAN



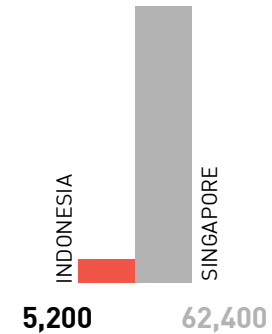
LIFE EXPECTANCY



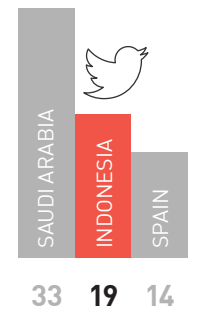
0-24 YEAR OLD (%)
Percentage of the 0-24 year old in the society



MEDIAN AGE
The average age of the population



Annual growth: 6%, 4%



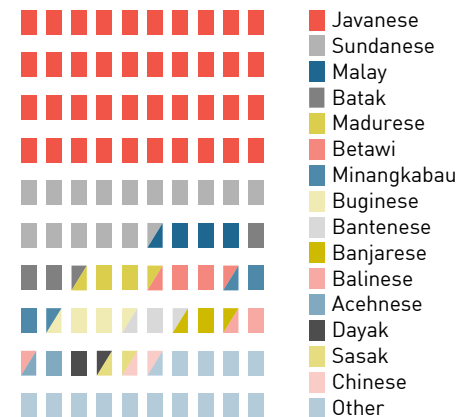
TWITTER PENETRATION (%)
Top three countries in the world. Percentage of active Twitter users relative to all internet users

253 MILLION PEOPLE

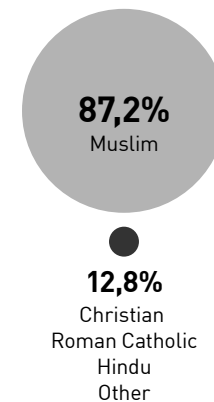


- One figure represents one million people
- Urban Consuming class (55 mil), annual grow 7% ↑
- Living in urban area (51% of the population)
- Living in rural area
- Population Growth rate **0.95%**
- Rate of urbanization **2.45%**
- Population of Singapore (5,6mil)

ETHNICITY



RELIGION



WHERE DID WE GO?

In recent years, Indonesia has made great strides in economic growth and development. These have been accompanied by rapid urbanisation. However, these metropolitans are straining under the rate of growth, facing increased pressures in the environment such as congestion, pollution, and poor quality of buildings. In response, each city has found it's own way of overcoming these stresses, indirectly impacting the ways that its citizens can achieve a healthier lifestyle.

By understanding the physical infrastructure and socio-cultural layer of each city the team could better contextualise participants' comments and behaviours as captured in the fieldwork.

Indonesia's second largest city has lots of public spaces and parks for recreation and leisure, integrating playgrounds and running tracks into green islands alongside traffic routes. The desire to find a new environment to live in has produced CitraLand, also known as the 'Singapore Surabaya', a first-class living environment with condominiums, villas, new schools and a hospital.

The capital of Indonesia is home to about 10 million people. Creative neighbourhoods are emerging, revitalising local arts, crafts, music, and fashion with a unique Indonesian twist. However, due to dense and inadequate urban infrastructure, traffic jams are common, except on Car Free Day. In a closed off central stretch of road tens of thousands flock to the streets to walk, run, cycle and skate, enjoying the street food, and soaking up the carnival-like atmosphere of Car Free Day on a weekly basis.

With a population of 2 million, urban infrastructure here is deteriorating, showing up as water pollution, air pollution and waste problems. Safety and security are also issues that dictate the way people, especially, women feel confident to use the city infrastructure. Although it has been ranked as the 4th most polluted city in the world, it is close to stunning natural landscapes like Lake Toba where locals like to escape to in the weekends.

SURABAYA

The Laid Back, Green City

JAKARTA

The Thriving City of Contrasts & Creativity

MEDAN

The Tough, Grey City in the Jungle

WHO DID WE TALK TO?

Twenty-four participants, both male and female were recruited.

Between the ages of 25-45.

Either single, or married with children.

Monthly Income between 15.000.000 to 50.000.000 Indonesian Rupiah (equivalent to 1587 to 5293 Singapore Dollars as of November 2014).

Living in Jakarta, Surabaya or Medan.



SINGH



ANIN



SUSANTO



KATHY



SILVIE



SALIM



WINDY



THOMAS



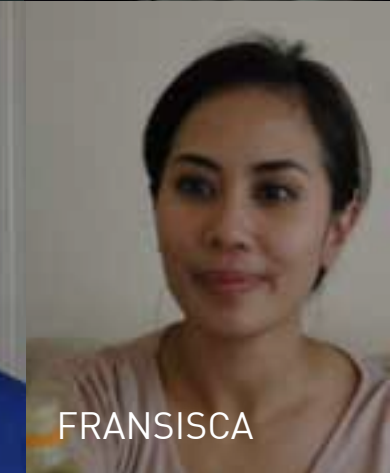
SANTIKA



RICKY



TEDDY



FRANSISCA



SILVI



KUKUH



CENNY



DESSY



HERU



FERRY



ANDI



ZAINAL



SARI



LENNY




AGUNG



IDA



INDONESIANS FIND HAPPINESS IN CONNECTING WITH OTHERS



THE DESIRE TO EAT HEALTHY IS LIMITED BY THE SOCIAL HABIT OF EATING TOGETHER



TRADITIONAL & NATURAL PRODUCTS ARE CONSIDERED SAFER THAN CONVENTIONAL MEDICINE




TO REJUVENATE ONESELF, A CALM AND POSITIVE MIND IS NEEDED



THE JOURNEY TO HEALTH IS ACHIEVED THROUGH FUN, NOT RULES



EVERYDAY ACTIVITIES CAN BE SEEN AS A SPORT



LOOKING GOOD IS ESSENTIAL FOR BOTH MEN AND WOMEN



PEOPLE ORGANISE THEIR LIFE AROUND THEIR UNHEALTHY CITIES



THEY LOVE LOCAL, AND CELEBRATE INDONESIA'S DIVERSE CULTURES



IT IS HIP TO BE CONSCIOUS AND ETHICAL



INTERNATIONAL PRODUCTS ARE PERCEIVED TO HAVE BETTER QUALITY AND STATUS



PEOPLE HAVE AN ACTIVE ENTREPRENEURIAL MINDSET



WOMEN STILL NEED TO FULFILL TRADITIONAL ROLES IN A MODERN SOCIETY

WHAT HAVE WE LEARNED?

Thirteen insights from the design ethnography study were distilled after analysing and synthesizing homework materials, interview data and videos, giving new perspective on Indonesian consumers and how they like to relax, rejuvenate and seek relief.

INDONESIANS FIND HAPPINESS IN CONNECTING WITH OTHERS

PEOPLE'S STRATEGIES

"I joined a herbal community so that I can share my experiences with others and also learn from them."

Ida

"You may have the knowledge and skill but without networking, it is nothing."

Heru

"I like to share my new choreography through Path and Facebook to my dance crowd and friends."

Anin

Community is very central to the life of an Indonesian. It is built through familiarity, trust, sharing the same interests, and meeting people regularly. These elements are also the building blocks of harmonious relationships, which are fertile breeding grounds for sharing advice. With Indonesians, word-of-mouth recommendations is definitely the most credible source before making a purchase¹⁰.

When it comes to being social, Indonesians are the experts. It is not a surprise then, that networking, for business as well as personal interests, comes naturally for them. Social media too is an obsession. The nature of these communication platforms are spontaneous, dynamic and collective, fitting in perfectly with their innate behaviour to connect. In fact, Jakarta became the world's most active city on Twitter¹¹ in 2012, with Bandung coming in at number six.

Being socially savvy both online and offline, trends spread virally in Indonesia. Personal recommendations promote new or even traditional health and wellness products and services. Exercise trends, especially mass exercise activities, spread quickly in Indonesia as people encourage each other to try the latest fitness craze before moving onto the next. Running, cycling, zumba and yoga have seen surges in popularity of late.

¹¹ SemioCast. 2012. Twitter Reaches Half a Billion Accounts.



THE DESIRE TO EAT HEALTHILY IS LIMITED BY THE SOCIAL HABIT OF EATING TOGETHER

PEOPLE'S STRATEGIES

"Food should be tasty and pleasurable. I cook whatever my children wants to eat."

Sari

"When I am at my mum's house I eat rendang but I don't take it back home so it won't tempt me..."

Deassy

"A little bit nakal is okay when it comes to eating when I am on holiday with the family."

Thomas

The Javanese, the largest ethnicity in Indonesia, has a saying: 'Mangan ora mangan asal ngumpul', which translates to 'It does not matter if there is food or no food, the most important thing is that we are together'. This emphasis on togetherness relates back to how much Indonesians value relationships. The problem however is that, when there is food, it is often crispy and much too oily. Still, this is what is considered delicious and is enjoyed in the company of friends or family.

There is a reluctance then and a hassle, to be so strict with one's personal diet as it immediately singles you out. It is much easier to just eat what the group is eating. There are those who try to adopt a healthier diet, but they do so by making discreet changes like reducing portion sizes of unhealthy food, using supplements to make up for eating unhealthy meals, and even replacing white rice which comes in set meals in fast food restaurants, with red rice brought from home.

Indonesians are very much attracted to fast food, due to the crunchy texture and fried flavours so similar to local Indonesian cuisine. Fast food restaurants popping up at a faster rate compared to healthy food options, which does not sit well on the Indonesian's discerning palate. It is perceived to be bland and tasteless, and is therefore unpopular.

TRADITIONAL AND NATURAL PRODUCTS AND SERVICES ARE CONSIDERED SAFER THAN CONVENTIONAL MEDICINE



PEOPLE'S STRATEGIES

"I eat a spoon of honey every morning and drink jamu when I get sick."

Ricky

"My mother taught me to make papaya facial. I like using it as it is cheaper and has no chemical side effect."

Ida

"I don't really trust doctors unless they use natural medicine like the chinese sinseh."

Agung

Indonesians have a strong mental awareness of their body, understanding it as a system that gets intoxicated by chemicals, both in their food and from the environment. The customary way of detoxing themselves is through consuming jamu, and going for massages- habits passed down for generations, that have now become part of everyday Indonesian culture.

The trust in the natural is reinforced by common beliefs that have also been passed down through generations. The royal family is believed to drink bandrek- a concoction of milk, tea, egg, ginger and honey, thought to be the healthiest drink in the whole of Indonesia. Myths around chemicals are also very strong, for example, that milk neutralises alcohol, and that medicine and even some jamu 's can damage the liver.

This deep-seated belief in traditional and natural products and remedies underlies their distrust in conventional medicine, modern chemicals and the national healthcare system at large. Indonesians perceive local preventative health screening as ineffective and an unnecessary scare tactic used by doctors. It is only when they realise that using natural herbs is not enough that they seek medical advice, which may by then be too late.



TO REJUVENATE ONESELF, A CALM AND POSITIVE MIND IS NEEDED

PEOPLE'S STRATEGIES

"Beauty comes from the inside, it should not be complicated."

Kathy

"Fasting and praying makes me feel healthy and in control of my life."

Susanto

"Once a month, I call a masseuse over to my house to relieve the tiredness of my family and I."

Ferry

Indonesians are more attuned to the state of their minds as compared to their bodies. They have personal strategies to de-stress and achieve peace-of-mind for themselves and their families on a regular basis. Even their love of going for massages, acupuncture treatments, and spa therapies, is for the purpose of relaxing their mind through physical touch, while aromatherapy relaxes them through smell. Sports is also seen as a good way to relieve mental stress, rather than a way to look after the physical body or to prevent illness.

Sometimes, the strategies to calm the mind are spiritual in nature and grounded in their respective religions. For the 87% of Indonesians who are Muslim, it is ensuring they keep their mandatory prayers five times a day that brings them mental peace and balance when feeling stressed. Difficulties and emotional pain are eased by putting them in God's hands.

Being more aware of their mental state of wellbeing, they prioritise how their mind feels as compared to their body. They more readily connect environmental triggers to mental stress, than connecting their diet to their physical health or disease condition. They are aware that smiling consciously makes them and those around them feel better, believing that a positive, smiling outlook reflects a healthy disposition.



THE JOURNEY TO HEALTH IS ACHIEVED THROUGH FUN, NOT RULES

PEOPLE'S STRATEGIES

"I eat less rice and less spicy food now that I am pregnant."

Cenny

"Sunday is our "cheat day" when the family can eat what we like, and not feel deprived or guilty."

Deassy

"To cope with stress, I massage my husband and he treats me with chocolates."

Ida

Indonesians are a fun bunch. Playing games, listening to or making music, and dancing, especially in social settings, is how Indonesians relax. They find pleasure in spontaneous bursts of fun while rigid rules cause stress and restrictions - mental burdens that they would rather avoid.

Diets should not be too rigid or stressful as health is a lifestyle, not a regime. Diets and exercise should still make them feel good. Being healthy is a lifelong commitment and not achieved through intense short diets. They give themselves leeway to indulge in food from the tip of the pyramid. Ice cream, chocolates and fried food will always be pleasurable for them, and therefore stay firmly on the menu.

Although not all Indonesians are active, once there is fun and a large community around a space, you will see engaged and happy Indonesians. Take Car Free Day for example when Jakarta and Surabaya's busiest streets are made blissfully car-free of ubiquitous traffic for residents to use for sports, recreation, socialisation, fun and games. Originally started as a government initiative to reduce pollution, Car Free Day now has become a well-loved tradition, and an opportunity for city folk to get up early and be active in the company of many like minds and bodies, before the heat of the day sets in.



EVERYDAY ACTIVITIES ARE CONSIDERED AS EXERCISE

PEOPLE'S STRATEGIES

"My housework is my daily exercise."

Cenny

"I like futsal because I can do sport, whilst having fun with friends and network at the same time."

Singh

"Walking to buy cigarettes or in the mall is an exercise for me as I get to sweat out all the toxins."

Ricky

People are busy with their daily lives and not every one manages to create regular, dedicated time for exercise. Those who are active live their lives around their exercise schedule. For those on the other end of the spectrum, daily activities and movements are considered as their exercise as these activities make them sweat and tire them. These include doing housework, making music (for example, playing the drum set engages their arms and legs), and walking around the mall or even taking a stroll to buy cigarettes.

For them exercise and other healthy habits need to be integrated in their daily routines. Although they are aware of the need to be healthy, they exercise only when it is convenient to fit into their schedules and when they feel it becomes a personal priority over looking after their family or working to make money.

Usually a major driver of increasing healthy habits and exercise would be major life events like pregnancy or marriage, or exposure to health trends while traveling or internet surfing. While internal drivers can include prevention of disease and better health, particularly for those who have experienced a serious health event of a friend or family member.



LOOKING GOOD IS ESSENTIAL FOR BOTH MEN AND WOMEN

PEOPLE'S STRATEGIES

"If I look and feel good, I know that I can perform well at work."

Andi

"I am 32 years old and not married. I need to look good to catch a husband."

Santika

"I'm too lazy to use beauty products because it makes me feel emasculated."

Salim

Having flawless and glowing skin and a fair skin tone is considered an important hallmark of beauty in Indonesia, both for men and women. This ideal image of beauty is reflected both in television shows and on magazine covers, resonating through social media among the country's young and internet-savvy population.

A woman's efforts to meet society's expectations of her beauty are more obvious in public, with many services and products catered to meet her needs. For single women, taking care of their appearances are important to attract future husbands. For married women, beauty is often projected in their home through making sure the interior decoration is stylish, comfortable and harmonious.

Not to be left out are the urban male consumers who have become more concerned about their how they look in terms of their face, skin and hair condition. It matters to them, as appearances communicate personality and sex appeal, factors which many believe lead to success in their professional and personal lives. However, grooming may make them feel less of a man. They do not want to be caught using most body care products because of the packaging, application and the hassle of maintaining such personal care regimes.



PEOPLE ORGANISE THEIR LIFE AROUND THEIR UNHEALTHY CITIES

PEOPLE'S STRATEGIES

"Since I moved to the city, my acne got worse because of the bad air and poor quality water."

Salim

"There is less pollution here in the suburbs, which is better for my kids as they can play outside."

Kukuh

"I like to escape from the city and go on holidays to the jungle or to places like Bali."

Lenny

As mentioned earlier, Indonesia's cities have problems managing their own infrastructures and quality of the built and natural environment. Residents have no choice but to react. How do they do this?

Those who stay in the city shower and clean themselves frequently in the day. As they attribute the condition of their bad skin to the poor quality of air and water, they install water filters and air purifiers to overcome this problem. Every time there is an opportunity to take a vacation break, they seek destinations with natural sceneries where they can breathe the fresh air they so badly lack.

Some Indonesians move to the suburbs, heading for greener and more spacious living conditions. However, living further away from the city centre, where most jobs are located, requires travel and time management due to traffic congestion. Some overcome this by cycling to work, as it helps them to get fit too. Bike-to-work schemes are currently being promoted by the government. Consequently, a large portion of people's time is spent on commuting to the city and between cities for work due to traffic congestion and failures in the road infrastructure. This makes day-to-day time management and scheduling difficult for all, and raises stress levels. Furthermore, moving homes to breathe cleaner air requires more drastic family lifestyle decisions that not everyone can take.



THEY LOVE LOCAL, AND CELEBRATE INDONESIA'S DIVERSE CULTURES

PEOPLE'S STRATEGIES

"I like to buy local to support Indonesian brands which are better suited to us."

Windy

"Every Sunday I run in the car-free day, shop at organic market and have coffee at a local independent coffee place."

Teddy

"I support the local independent products to revitalise Indonesia's economy."

Zainal

Indonesians are faithful to brands. Local brands are especially preferred in the food and beverage sector, and the pharmaceutical sector¹⁰. Indonesians trust local companies as they believe that only local companies truly understand them, and provide them better value for money when compared to foreign brands. They take pride in local brands believing this is the best way to revitalise local identity and community.

As 87%¹² of Indonesians are Muslims, buying local also means buying products which reflect the Muslim lifestyle. For some, it is not just to show their pious lifestyles, but about shunning Western consumerism that threatens to erode Islamic values.

Revival of local arts, music and crafts in cities like Jakarta and Medan are creating a vibrant scene for independent artists and rebuilding local artisan communities. Indonesians are creative people, they are naturally drawn to homemade or do-it-yourself (DIY) products or services, as they enjoy making things for themselves adding a unique Indonesian twist.

¹⁰ Rohit Razdan, Mohit Das, Ajay Sohoni. 2013. The Evolving Indonesian Consumer. McKinsey Asia Consumer Insights Center

¹² Central Intelligence Agency. 2014. The World Factbook, Indonesia.

IT IS HIP TO BE CONSCIOUS AND ETHICAL



PEOPLE'S STRATEGIES

"I love cafes where they roast their own beans and where the baristas engage with each customer warmly."

Teddy

"I like to buy products which gives proceeds to causes that can make a difference to the community."

Kukuh

"I prefer to spend on organic products for my skincare and making it on my own rather than buying over the shelf products."

Windy

Indonesians are increasingly valuing the experience of the place and the quality of the products offered over the price, choosing to have a cuppa in a modern local coffee shop over a traditional one or even Starbucks. They like to have an authentic coffee experience where they are able to understand where their coffee beans come from, how they are roasted, and who their local baristas are. Furthermore, local café brands are cheaper. Their popularity of cafés can be seen in their numerous numbers expanding all over the major cities of Indonesia¹².

Indonesians want to show that they care through their dollar votes, that is through choosing carefully how they will spend their money and which cause that money will fund. Organic foods are selected not just because they are healthy, but because they support the environment and reflect an ethical lifestyle.

Although this is a new trend among a niche group of young, informed and well-travelled Indonesians, products which reflect the conscious and ethical consumer are still very difficult to find in the main metropolitans.

¹² Euromonitor. 2014. Cafes/Bars in Indonesia.



INTERNATIONAL PRODUCTS ARE PERCEIVED TO HAVE BETTER QUALITY AND STATUS

PEOPLE'S STRATEGIES

"For beauty products I love to try new international brands but I believe Asian brands suit Asian skin better."

Silvi

"We travel to Singapore to get information and to source for latest running shoes."

Deassy

"I wanted to be more independent and gain more life experience, that was why I stayed in Italy for 2 years."

Windy

Although international products are more expensive to purchase given the high taxation on imported goods, Indonesians regard them as being safer and or of better quality. Owning a product from an international brand is also an indication of one's social position and how trendy they are. They aspire to upgrade themselves and own foreign international brands. Often, these select Indonesians are well-educated and mobile, travelling within the country and overseas.

Although Western brands are seen as credible and of higher quality, they do prefer Asian brands especially Japanese and Korean brands as they are seen as more relevant and suited to their skin.

Billionaires INFO

PEOPLE HAVE AN ACTIVE ENTREPRENEURIAL MINDSET



PEOPLE'S STRATEGIES

"I usually check brochures every week to find the cheapest price or discounted products."

Ida

"To be successful, you must find opportunities and keep trying."

Sari

"Product without marketing means nothing."

Heru

Many Indonesians have dreams of owning a home business. Many of them have several side jobs to supplement their main income which bring them a greater sense of security and independence from the public systems they tend to distrust. Working from home and being their own boss also allows them the freedom to work flexibly, spending more time with family or making time for healthy habits, as well as avoiding the dreaded commuter traffic each day.

However, most Indonesians are not risk-takers but happy followers of popular trends. They are more concerned about how sellable a product is, and the monetary benefit it can give them, compared to knowing exactly how and why a product benefits someone. Hence, multi-level marketing schemes are prevalent in Indonesian communities and they are very active and engaged in this kind of business. It feeds their passion for social networking, making extra money and fulfills their desire to be seen as leaders within their own communities.

WOMEN STILL NEED TO FULFILL TRADITIONAL ROLES IN A MODERN SOCIETY



PEOPLE'S STRATEGIES

"My wife makes sure that I try to eat healthy. She even prepares a tupperware of red rice when we go to the mall to have fast food."

Susanto

"I feel like a real mother on weekends when I cook for my family which is something I miss on weekdays."

Fransisca

"Whenever my family needs it, I give them a massage. I learn from watching Youtube."

Sari

Indonesian women are smart and dynamic being either successful working women or active housewives. They know what they want and they are capable to go out and get it themselves. However, part of their identity lies in being a wife and/or mother as they feel fulfilled in carrying out these roles. Their children need to be fed and their husbands need to be taken care of. These are responsibilities that Indonesian society expects from its women, and that they cannot readily abandon.

What is apparent is that the woman of the house is the key person to introduce healthier food alternatives or practices to the family. However doing what makes the family happy, like giving massages or cooking their favourite foods, is her priority, sometimes at the expense of neglecting her own health and wellness needs.

In the midst of balancing work and managing the home, there is much need and desire for women to have some me-time to recharge and refresh themselves in order to maintain their roles. They take care of themselves also to please husbands, or to look attractive for a potential partner. This is a big motivation for them to feel good and look beautiful.

HOW TO SATISFY PEOPLE'S NEEDS

Insights are valuable to a business when they can be translated to new opportunities and solutions. Personas help perform this translation. Eight personas were crafted from the dataset of the 24 participants, the "hypothetical archetypes of actual users", based on their motivations (what level of health and wellness are they aspiring towards?) and their behaviours (what are they doing now to reach that level of health and wellness?). These personas are rich and specific compared to demographics data usually seen in market research. They allow the designer of new products and services to better empathise with a range of different Indonesian attitudes to health and wellbeing, and relate to various lifestyle contexts and routines, whilst ensuring that specific needs are met. Making personas takes time, but also saves time when needing to communicate insights and new opportunities, as well as when developing concepts later on in the innovation process.

high level of health awareness

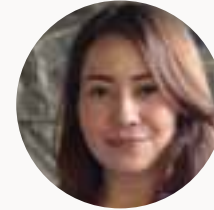


THE JUGGLING MUMPRENEUR
SARI
SISCA



THE HIGH ACHIEVER
HERU

They are aware of how to be healthy, but practice it only when convenient and easy for them as they lead very busy lives.



THE SOLO BEAUTY
LENNY
WINDY
SANTIKA



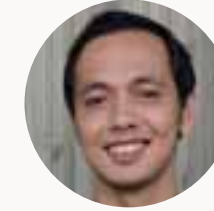
THE ACTIVE FAMILY MAN
KUKUH
ZAINAL



THE MEDITATOR
FERRY
SUSANTO

They are curious and love learning. But they are comfortable with their current habits, and need to receive samples or teasers to become more active.

low level of health awareness



THE SPORTY HIPSTER
TEDDY



THE HOLISTIC BALANCER
DEASSY
SILVI

These are the health leaders. Learning never stops and they want new and more ways to keep being healthy, impacting others around them.



THE DOUBLE DOER
ANIN

healthy habits integrated into lifestyle

The twelve personas created are mapped on two principal axes, showing the extent to which healthy habits are integrated into lifestyle, and the level of health awareness. This framework provides a good bandwidth of persona types to support the widest exploration of new business opportunity areas related to health and wellness in Indonesia.

ad-hoc healthy habits



THE GOOD-LOOKING BACHELOR
SINGH
SALIM
ANDI



THE SIMPLE BEGINNER
SILVIE
KATHY



THE CONSCIOUS MUM-TO-BE
CENNY
IDA



THE COMMUNITY GIVER
THOMAS
RICKY

These are the potential adopters of healthy lifestyles. Now they have adhoc healthy habits, but need strong reasons often external, to move past this stage.

CONCEPTS OVERVIEW

13 INSIGHTS
8 PERSONAS
8 CONCEPTS

Only after understanding people's needs can we design for them. These concepts are the result of using personas and insights to inform and inspire new concepts and directions. They serve as a taster to the possibilities of new propositions your business could deliver, and are not limited to what you see in this book. For each of the eight personas there are even more potential concepts to imagine that leverage the value your particular business can offer to Indonesians. This set of eight concepts were chosen because they illustrate a good variety of different types of solution you can create using such a design ethnography approach - products, product-service combinations, communication or system solutions.



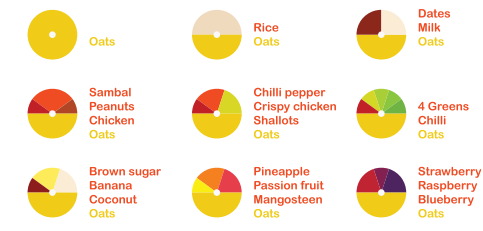
NAKACHAL BY MISTER BRO

PRODUCT



BREAKPURE OATS

PRODUCT



RUN4

APP & SERVICE



JAMU+

PRODUCT & SERVICE



HONEYBOOST

PRODUCT



B-LINK

APP, INFRASTRUCTURE & SERVICE



MAMA TIME

APP & SERVICE



FIRST HEALTH STOP

SERVICE





THE GOOD LOOKING BACHELOR

He has a carefree attitude to life and doesn't want to have too much responsibility at his young age. Health is not a priority, but he does care about his appearance, investing time every day to make sure he leaves the house looking good. However, he does not want to be seen using beauty products as it makes him feel emasculated. Spontaneity and having fun make him happy; music, friends, and video games are ways to relax and switch off. His spending power is high and he can be impulsive when shopping. His mother and grandmother look after him well, but he's trying to find a wife to take over the job.



THE GOOD LOOKING BACHELOR

26 years old

Single

Living with his extended family

Radio broadcaster

ISSUES/CHALLENGES

His self-confidence depends on how popular and successful he can appear to others.

Being social keeps his spirits up, otherwise he can get a little depressed.

Controlling his diet can be tough, he can't resist the tasty but unhealthy food his family makes for him.

STRATEGIES

At salary time he spends more money going out with friends.

At the end of the month when funds are lower, he stays home playing video games in his room.

He enjoys playing futsal now and then, it's a social way to exercise and have fun.

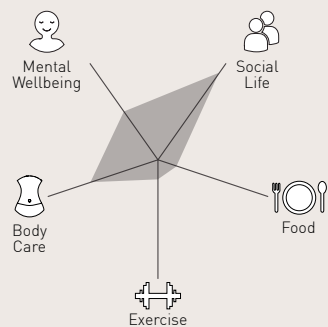
He uses men's skin care products for his acne, but customises the ingredients or application to fit his needs.

NEEDS

Beauty products that appear "manly" so that he can feel confident using them.

Simple and easy-to-use products and services for balancing his diet.

Playful services that make him laugh and keep him engaged.



1



2

1. He works in a creative environment and considers his workplace his playground.

2. He likes to snack throughout the day even though the doctor has advised him to avoid chocolate to prevent his acne from getting worse.

3. He plays video games for at least an hour everyday.

4-5. He suffers from acne partly due to the poor air and water quality. He often feels lazy to use skin care products as it makes him feel emasculated.



3



4



5



NAKACHAL BY MISTER BRO

REAL MEN DRINK FOR BEAUTY

Nakachal by Mister Bro (a combination of the Bahasa Indonesia words 'Nakal', meaning 'Naughty' and 'Kacak' meaning 'Handsome') fills a gap in the current male beauty care market. Existing products make Indonesian men feel embarrassed to take care of their appearances. This range of colourful lozenges, each with a specific beauty function, creates a hassle-free, playful way for men to feel good about taking care of themselves.



2

1. Designed to be enjoyed with friends, removing the social stigma around men and body care.
2. Light and slim, carry one in your pocket to look good any time of the day. Each lozenge is shaped as a fun and playful character.
3. Choose a lozenge, drop it in water, watch it fizz then sit back, sip and enjoy.
4. A diverse range of lozenges offer numerous functions to boost a man's health and beauty, in packaging they will want to collect and keep.



3



4



THE MEDITATOR

He is a very organised person, running several businesses simultaneously and managing a team of people. He handles the stress of his work with mediation and prayer; it calms and focuses his mind away from his worries, and offers him relief throughout the day. His wife influences his choices, from the decoration of their home to the food they eat. The Meditator likes to mix business and pleasure, he is happy when socialising in his community.



THE MEDITATOR

32 years old
 Married and trying for a child
 Devout muslim
 Entrepreneur

ISSUES/CHALLENGES

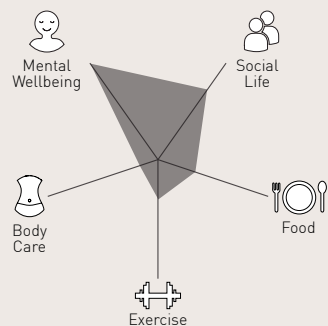
He used to be prone to different illnesses, such as colds, indigestion and flatulence.
 As a non-smoker, sometimes he finds it hard to bond or network with his male friends and colleagues.
 Staying fit and healthy to be able to give his wife a new baby.

STRATEGIES

Fasting every alternate day to keep mind and body, clean and fresh.
 Every evening writing down a to-do list for the next day, to stay organised and manage his time.
 Integrating spiritual practice into his everyday life, to stay calm and have clarity of thought.
 Taking home cooked red rice with them when they eat out, mixing it with fast food for a healthier meal.

NEEDS

Solutions that come with a clear, structured framework or plan that makes it easier to incorporate into his agenda.
 Simple products that deliver a good balance of quality and price and they can be loyal to.



1. Whenever he feels stressed at work, he takes a break and prays. Praying keeps him calm and leaves his worries behind.
2. He just got married recently and is trying to be healthy so that they can start a family.
3. He eats what his wife cooks, she has influenced him to start eating healthily.
4. His wife prepares a tupperware of red rice and they bring it along with them whenever they eat out.





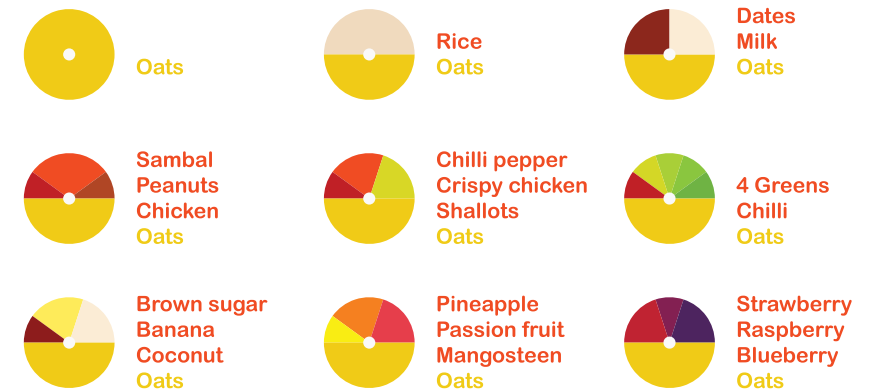
BREAKPURE OATS

BREAK THE OATS.
BREAK THE HABIT.

In this majority Muslim country, Ramadan, a time where Muslims fast from dawn to dusk, is also a time of introspection into the individual's past spiritual habits. It is also a time where they make resolutions to improve themselves. By embedding the product in a moment where families and friends gather to break their fast, BreakPure Oats offers a seamless way for a healthy yet delicious alternative. Providing an easy step away from the fried food on offer in Indonesia when Ramadan and much of social eating comes around.



2



3

1. BreakPure Oats are portable and snappable for easy sharing, especially during Ramadan when the breaking fast meal is a social event for Muslims.
- 2-3. To appeal to the discerning palate of Indonesians who love tasty, spicy and sweet food, BreakPure Oats has an oats base and a variety of delicious toppings.
4. In order to inspire new habit formation even beyond Ramadan, health quotes and tips on the packaging, bring an element of surprise and fun with every BreakPure Oats.



4



THE HIGH ACHIEVER

He has multiple businesses he runs simultaneously. Whatever he does, he must do well. He loves a challenge. He feels time is precious, every minute counts, and needs to be productive without making excuses. He uses sport as a means of de-stressing, switching modes between work and exercise to gain a new perspective and increase his stamina. He eats supplements to finely tune his energy levels according to the demands of his busy agenda.



THE HIGH ACHIEVER

42 years old

Married with 2 children aged 7 and 10 years old

Living with parents

Entrepreneur

ISSUES/CHALLENGES

Fitting in sufficient rest and relaxation into his busy schedule.

Not having time for his real passion of orchid growing, putting this off until he retires.

Having to live up to the expectations of himself and his active family as he realises he starts to realise he is getting old.

STRATEGIES

Caring for his family by treating them to home massage services and treatments.

Sleeping in his car to recover his energy on long commutes between cities for work.

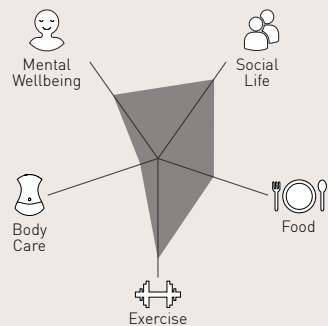
Eating vitamin and pollen supplements and drinking energy drinks to boost his stamina.

Motivating himself with tangible results from his efforts, e.g. his muscles developing, his business network or customer base growing.

NEEDS

Empowering ways to maximise his stamina and fine tune his performance daily.

Providing tangible and specific feedback on his performance and progress.



1



2

1-2. Whenever he feels stressed with work, he likes to take a break by playing badminton.

3-4. He prefers products that give him instant relief from aches, and he relies on caffeine to get an instant energy boost.

5-6. He believes that a product without proper network marketing is useless.



3



4



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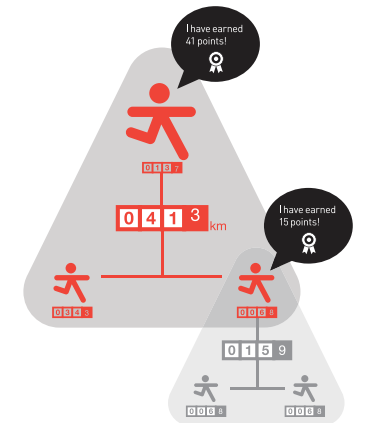
6



RUN4

GET ACTIVE WITH FRIENDS AND BE REWARDED

Multi-level marketing (MLM) is a popular mechanism engaging and motivating many Indonesians to form communities and create businesses around new products. Tapping on their love of building connections, Run4 is a network-based sports app that challenges people to be healthy together. Instead of recognising individual effort, social clout is rewarded when community health champions bring friends together to meet exercise challenges, earning points to buy healthy products.



1. Run4 works as a network-based sports app that accumulates data collected from other activity tracking devices to encourage people to be healthy together.

2. It adopts the MLM pyramid structure that rewards you with more points when you challenge and inspire the people in your network to exercise.

3-4. Points that were acquired can be redeemed discounts on the next purchase of sports equipments or health and wellbeing services.





THE CONSCIOUS MUM-TO-BE

Healthy habits are a temporary priority for the Mum-to-be as she prepares her body for having a baby, typically modifying her diet to eat safer, more nutritious food, and trying to keep her work stress under control. She uses traditional jamu and herbal supplements to boost her hormones and fertility. She runs her household cost-consciously, preparing family meals at home even though she is short of time. Her hectic life and family focus leaves little time for her own relaxation and beauty care.



THE CONSCIOUS MUM-TO-BE

38 years old

Married with a 3 year old son and trying for a second baby

Call centre supervisor

ISSUES/CHALLENGES

Hormone imbalances are affecting her fertility being an older mum-to-be.

Limited time to run the household and care for herself while working full time.

Easily finding value-for-money, safe and nutritious produce.

No time for researching new products and services, yet worried about harmful ingredients.

STRATEGIES

Trusting in traditional and natural products that cheaply and safely detox and protect the body.

Buying products that make or save her money, i.e. multilevel marketing deals, discount vouchers, special offers and sales etc.

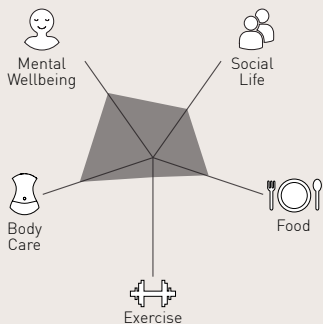
She considers housework as her daily exercise because it is physical work.

NEEDS

DIY ways to strengthen and detox the body in preparation for becoming/being pregnant.

Access to trustworthy sources; word-of-mouth recommendations from relatives and close friends.

Joyful, easy and cheap activities to do with her family.



1. Dinner is the only time when they sit down as a family and have a meal together, as they are both working during the day.
2. She uses baby products that are recommended by her friends.
3. She consumes jamu at least once a week to safely detox and protect her body.
4. She considers housework, such as doing the laundry, as her daily exercise.





JAMU+

A FAMILIAR FIRST STEP TOWARDS
HOLISTIC HEALTHCARE

Indonesians use traditional herbal remedies, Jamu, to build up their general health. In comparison, they can be distrustful of conventional healthcare. To leverage the trust that locals have in traditional medicine, Jamu+ offers healthy herbs for specific health functions and gently extends the idea to include prevention and mobile health screening services. Jamu+ pops up where people are, be it at the office or at outdoor events, making clinical healthcare services more approachable, complementary and convenient- giving Indonesians a new perception of conventional healthcare.



1. J+ Café offers a range of healthy jamu for locals to try, whilst learning about different diseases and conditions.
2. The mobile J+ service offers a menu of jamu products along with a health screening service.
3. Points collected by consuming J+ products and attending screening programmes can be redeemed for other healthy products or services.
4. The colourful bottle caps are designed as collectibles, with quotes and health facts on the flipside.





THE SPORTY HIPSTER

He lives with his wife in a new condominium apartment in the city that has a swimming pool and gym. He has a well-paid job as a development aid worker, but he has a passion to understand and appreciate the little things in life through poetry and novel writing. He and his wife make a good team. He eats what she cooks - healthy, fresh, and organic food. They work together on projects, writing a travel blog. Their healthy routines are enmeshed, they plan their activities as a team, making use of the time at weekends to fit in exercise, relaxation, hobbies and good food.



THE SPORTY HIPSTER

30 years old

Recently married

Development aid worker and writer

ISSUES/CHALLENGES

Thinks healthy food never tastes good but tolerates it because it is healthy.

Limited choice in healthy, alternative and progressive products, services and experiences.

STRATEGIES

Regular exercise using the office gym and running at the weekends, all in moderation.

Supporting local independent shops and produce to revitalise the economy and eat fresher food.

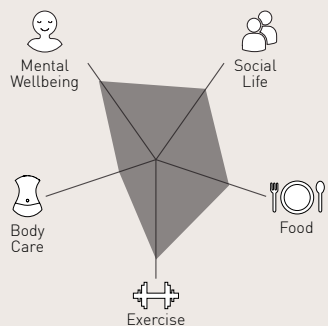
Using social media and travel to be inspired and source new products and ideas.

Relaxes with the “third wave of coffee shop” experience, where the coffee is roasted and the barista engages with each customer and carefully selects the products he offers.

NEEDS

Fresh inspiration and new experiences, mixing traditional and innovative solutions, local and international products.

Ways to invest in his health and wellbeing for the future.



1. His wife prepares him healthy smoothies made with vegetables and fruits in the morning.

2. He eats what she cooks, healthy and simple meals, using recipes from these books.

3. Photos of their best memories, both together and with friends, are printed and pinned on the wall.

4. It is important for him to do consistent light daily exercise which helps him prepare for his yearly hiking trip.

5. He often buys organic produce after his run on car-free days.





HONEYBOOST

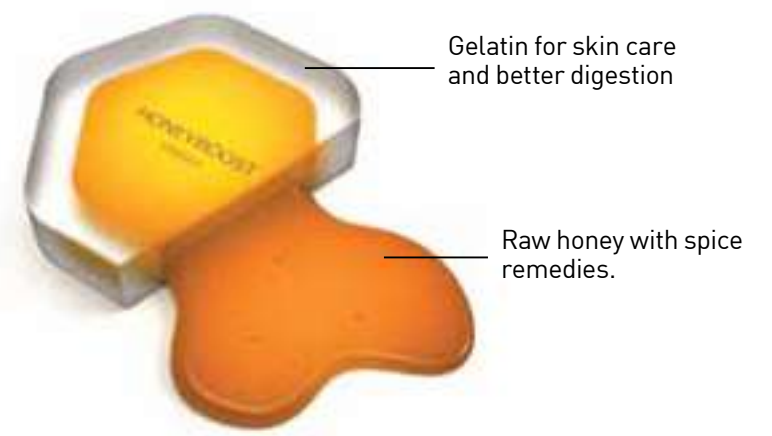
AN ANCIENT NATURAL ENERGY SOURCE, REVITALISED

Young hip Indonesians know that natural ingredients are the best for a healthy lifestyle, but preparing them for consumption can be tedious, especially with their hectic schedules. Still, they seek healthy and natural foods with authentic and wholesome ingredients. Using an age-old ingredient of the earth, HoneyBoost is a new way to consume honey in support of an active lifestyle. Raw honey encased in an easy, chewable format – a natural energy boost without the mess or fuss.



2

1. Each capsule contains raw honey mixed with natural active ingredients, like chia seeds or spices. Combo strips – Prepare, Go, Recover - support the body's changing energy needs: warm-up energy before sport, slow-release during and healing energy afterwards.
2. Packaged in an iconic, convenient roll. Pull and tear-off to consume. Clean, pure and simple.
4. The capsule can also be worn within a wrist band accessory for easier consumption on-the-go.



3



4



THE ACTIVE FAMILY MAN

He is practical, ambitious and loving. He has made clear choices to change his lifestyle to be healthier; moving his family from the city to the greener more spacious suburbs, commuting by bike to work to get fit, but also beat the traffic, and passing up a promotion to be able to spend time with his family as well as minimise his stress. His hobby is cycling, it is almost an obsession, he collects vintage bikes and buys the latest accessories. He likes to track his performance and connect to local and worldwide online communities to compete with them and share his passion.



THE ACTIVE FAMILY MAN

40 years old

Married with 2 children aged 3 and 5 years old

Civil servant

ISSUES/CHALLENGES

Making time for his family and his hobbies.

Pressure to stick to his routines, with little room for flexibility.

Being late for work means he loses a proportion of his salary, this is a source of stress.

He is worried knowing that the food his family buys usually contains a lot of harmful additives and preservatives, and he cannot easily find good alternatives.

STRATEGIES

Combining staying fit, getting home faster and mastering a daily challenge with biking to work.

Moving to the suburbs to give the family the best quality of life within their budget.

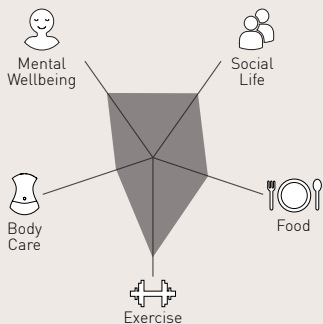
Growing his own food where possible to offer healthier food choices.

NEEDS

More accessible and affordable healthy food choices.

Ambitious challenges in life, to not get bored and to feel a sense of achievement.

Applications that support playful exercise challenges within a community.



1. He wears an emergency bracelet that shows his personal details so that he can be identified in case of an accident.

2. He likes to take part in Endomondo challenges and feels a sense of achievement when he completes a challenge.

3. He moved to the suburbs so that his family could enjoy a better life, away from the heavily polluted city centre.

4-5. He cycles to work daily.

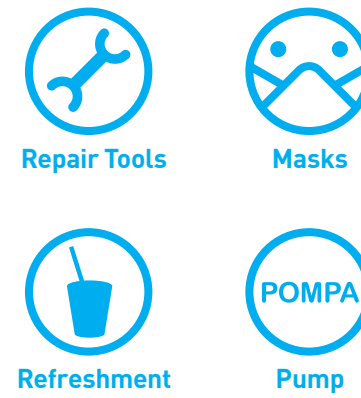




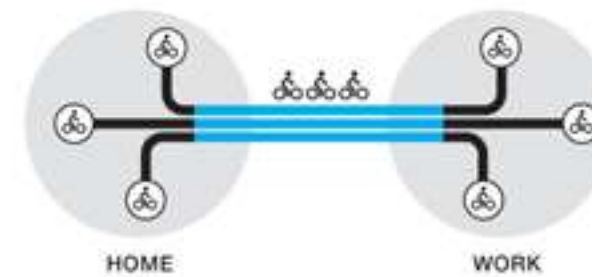
B-LINK

EMPOWERING A CYCLING COMMUNITY

Indonesian metropolitan cities are congested and unsafe for cyclists, yet they are a growing breed. Supporting those who bike to work, B.Link is the first community infrastructure and digital service which empowers cyclists in their quest to be fit, safe, and efficient about time. Tapping on crowdsourced routes made by fellow cyclists, B.Link makes cycling a healthy, social, and viable means of transport for Indonesia.



2



1. B-Link offers a network of chillout points where cyclists can pump air in their tires, refresh and socialise.
2. Cyclists can buy tools to fix their bicycles, masks to protect themselves from pollution, rain gear and other bike accessories. They can also buy healthy snacks that are easy to munch on.
3. Discovering and checking in at different locations using the app helps cyclists accumulate points that can be redeemed for healthy snacks or cycling products.



3



THE JUGGLING MUMPRENEUR

She has been working full time running her own home-based business for the past 4 years. She loves what she does and finds satisfaction in doing it everyday but she gets tired and stressed trying to juggle work and family commitments. The mumpreneur would love to find more time for herself to relax and recharge, and care for her body. She is constantly on the lookout for practical, affordable and healthy solutions for her and her family.



THE JUGGLING MUMPRENEUR

35 years old

Married with an 8 year old son

2 jobs including a home business

ISSUES/CHALLENGES

Time management is a constant struggle and stress of daily life.

Mental stress and fatigue from multi-tasking and trying to meet her own expectations of being a mum, wife, daughter and career woman.

Finding productive, creative outlets for her high energy.

STRATEGIES

Using a home-delivery diet service to provide healthy meals whilst saving time.

Not sticking too rigidly to a single set of healthy habits, but trying out new solutions.

A regular weekend pamper session at the spa helps her recharge for the working week.

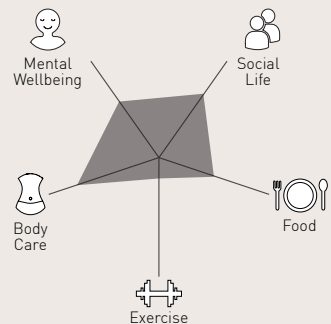
NEEDS

Time-saving solutions to help her look after her and her family's health and wellbeing.

Flexible and convenient services that come to her.

Easy and regular ways to recharge her energy as a routine.

Products and services that make her feel beautiful, even while she is busy.



1



2

1-2. She is a working mum and is constantly busy even when she is pampering herself at the salon.

3. There is a grocery delivery service on weekday mornings that brings fresh produce to households in her neighbourhood.

4-5. She feels like a mother during the weekends when she has time to shop and cook for her family.



3



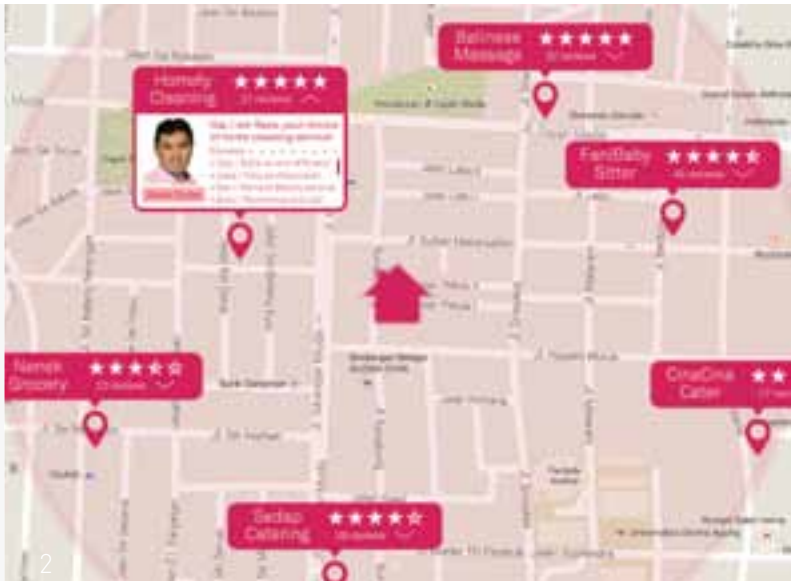
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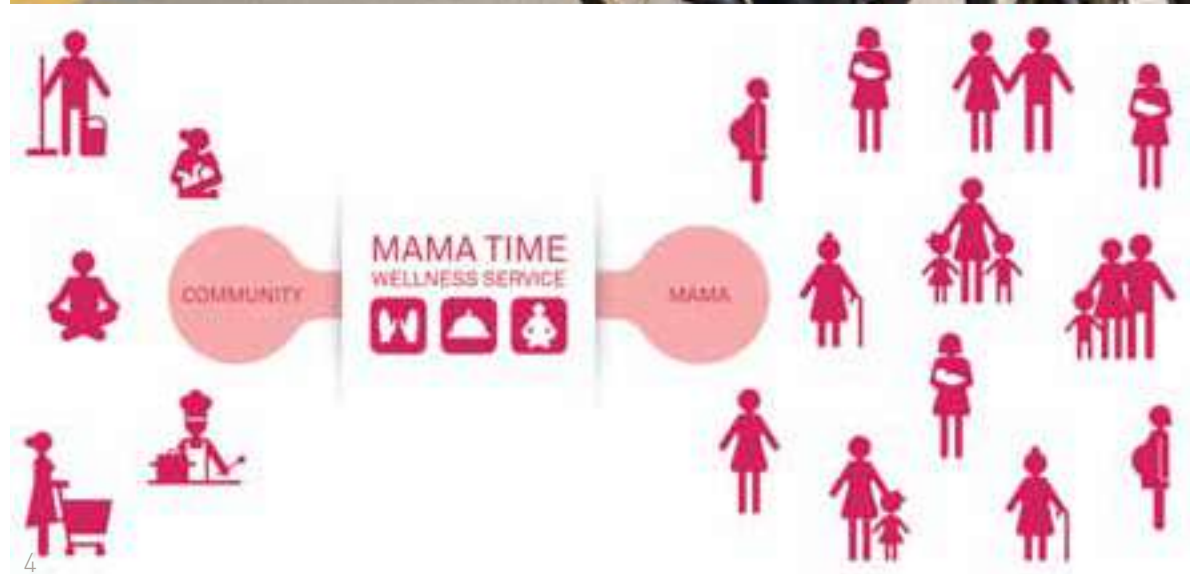
1. Mothers can order a home massage and choose additional simultaneous services to care for their household while they relax.
2. A pull-up map reveals neighbourhood services and related reviews.
3. Local services come into their homes, helping mothers avoid traffic jams and save time.
4. Mama Time aims to link up mothers in the community with each other and a host of valuable services.



MAMA TIME

CREATING STRESS-FREE ME-TIME WITHOUT FAMILY WORRIES

Middle-income women in Indonesia are actively juggling family duties and for many, work. Despite their busy schedules they are highly aware of health trends. However, they struggle to find time for their own wellbeing. Mama Time offers mothers respite through a range of home-based services that can relax and pamper them, while taking care of their family's needs.





THE HOLISTIC BALANCER

She knows what she wants and is very sure of who she is. Her family comes first, work and career second. She has a longterm proactive view on health and well being; integrating physical, mental and spiritual health into daily living. Her husband and her act as role models for others, sharing their personal advice, experiences or positive thoughts via social media. She struggles to find quality products and services that can support a healthy lifestyle in Indonesia, traveling to Singapore to shop and source for ideas.



THE HOLISTIC BALANCER

37 years old

Married with an 11 year old daughter

Marketing consultant

ISSUES/CHALLENGES

Trying to pass on her healthy habits to her daughter who is overweight.

Convincing her parents of the need to prepare healthier meals than the tasty traditional ones.

Overcoming her natural laziness and tendency to find the easiest solution for things.

STRATEGIES

Making Sundays a "cheat day" when the family can eat what they like, and not feel deprived or guilty.

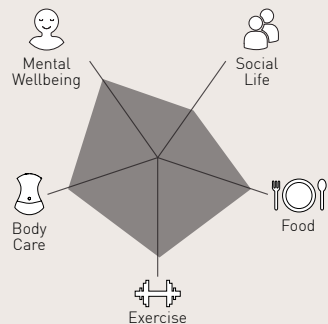
Finds driving in the heavy city traffic very stressful, so she prefers to have a driver than a helper at home.

Staying beautiful after pregnancy mixing traditional practices, like massage and body wrapping, with high end body care products.

NEEDS

Flexible services that make healthy lifestyle easy and integrated into daily life.

Inspiration and ideas to develop their knowledge around healthy, happy living.



1. She tries to make her home a cosy environment where her family can relax.

2. She prepares healthy meals for her family everyday. The family has a "cheat day" on Sundays when they can eat whatever they like.

3. She is consistent with her exercise routines and often posts via social media to encourage other people.

4. She fuels her healthy habits by using apps to track her daily activities and incentivise herself.

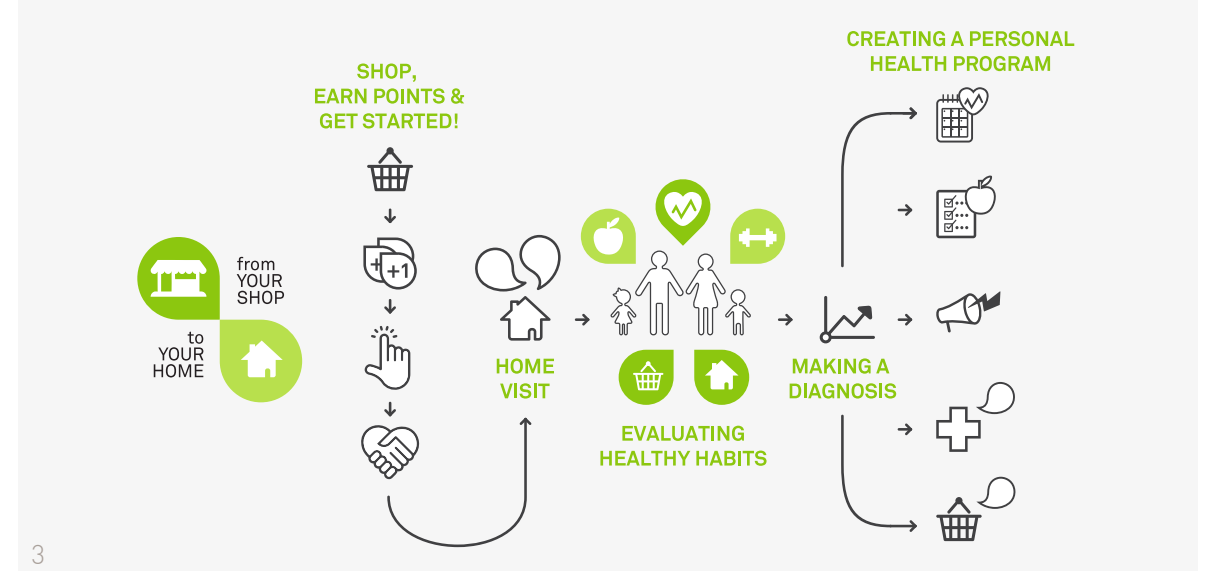




FIRST HEALTH STOP

SUPERMARKET LIFE COMPANION

Even the most informed and proactive Indonesians struggle to find the right products and services to maintain their healthy lifestyle. This supermarket is a regular health stop that acts as a primary health touchpoint, introducing new products and services to the health-conscious Indonesian consumer. Beyond selling products, First Health Stop offers healthy lifestyle coaching services to build a partnership with customers and together find ways to improve not only their personal health, but also create a healthy home environment in which to live.



1. While a customer shops for shower products, a First Health Stop consultant points out a breast cancer awareness campaign.
2. Buying healthier groceries, customers earn points they can redeem for health coaching services.
3. A healthy lifestyle ecosystem, in partnership with your supermarket.
4. The mobile app supports customers to think holistically about their health and wellbeing.



SO, WHAT CAN YOU DO NEXT?

Glad you asked. Each investor, businessman, and designer wants to make products and services that make a difference. You might be overwhelmed with demands of daily business operations, but still need to jumpstart growth for your company. It may be comfortable to default to market research, but everyone else is doing that. Have the courage to dig into the messy lives of your users and understand their needs, from their point-of-view.

The eight concepts demonstrate how you can come up with new meaningful products and services when you put the user or consumer in the centre of your innovation process. Their purpose is to inform you on the process of design-driven innovation, showcasing how insights can be turned into exciting new solutions, and inspire you to utilise this design ethnography methodology to compete and command a premium in the Indonesian market. If you care, you can put meaningful things into the world.

Here are some of the next steps to take:

1. Focus on the insights and personas that are closest to your target market and ideate more concepts.

The personas give us insights to an expanding Indonesian market segment. Take them as tools for you to generate, develop and test your own concepts with your whole team (yes, including the non-designers).

2. Tinker, pull apart and prototype the concepts.

Use the concepts as a starting point to generate further ideas which are more aligned to your enterprise's strategy and strengths. Enrich the concepts with industrial knowledge, prototype them and test the usability with potential consumers in Indonesia.

3. Apply design ethnography in your targeted consumer segment.

Engage a specialist design consultancy to do a further ethnographic study to gain a deeper understanding of your target Indonesian user's behaviours and latent needs.

4. Adopt design-driven innovation into your organisation.

Engage design-driven innovation facilitators to conduct trainings and workshops and build up your organisation's capacity in innovation, and compete from a higher ground.

Commissioned by:



The vision of the DesignSingapore Council is for design to differentiate Singapore from global competition. As the national agency for design, the Council's mission is to develop the design sector, help Singapore use design for innovation and growth, and to make life better. The DesignSingapore Council is part of the Ministry of Communications and Information.

www.designsingapore.org

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Research, insights, personas and concepts developed by:



fuelfor is a specialist design consultancy creating award-winning health and wellbeing products, services and experiences for clients in Europe, Asia and the United States. With over 15 years of healthcare industry experience, their professional competences span from insights research and strategy to user-centred design and solution development. They have studios in Barcelona and Singapore.

www.fuelfor.net

THANK YOU!

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Chiu Fong Yee
Cindy Ng
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Ricky Yeo
Thierry Do
Woo Huaijie

IE Singapore

Angeline Chan
Clarence Tan
Fiona Tan
Kendra Lee
Shuo Xian Tan
Wee Teck Phua
Yong Sheng Tam

fuelfor

Alexandra Indriani Tulusan
Anthony Oh
Cristina Guembe Martínez
Haraldur Már Unnarsson
Joycelyn Lee Zi Hui
Keiko Ueda Chaffee
László Herczeg

Lekshmy Parameswaran
Mar Llinés Montserrat
Muhammad Firdaus Nooraznan
Nadiyah Nurfadilah Nooraznan
Nadirah Binte Norruddin
Nazeera Binte Mohamed
Nur Safiah Alias
Peter Kukorelli

fuelfor Indonesia team

Dodid Wijanarko
Debby Nur Wulandari
Jennifer Jovana
Karina Chandra
Linda Yusmiyani Hasibuan
Loli
Lulu Nur Hidayah
M. Dennis Frafanasta
Mustika Yuliandri
Renny Susanto
Ronald Siahaan
Robertus Indra
The Rooster
Yusuf Choirul Abidin
Yulin Masdakaty

National Design Centre

Din
Team at Kapok



INSIGHT AND OPPORTUNITIES
FROM A DESIGN ETHNOGRAPHY STUDY IN JAKARTA,
MEDAN & SURABAYA