



Proposed digital marketing strategy: A case of multinational mask producer in indonesia

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ABSTRACT

Triple Nexguard Indonesia, as one of the multinational mask manufacturers in Indonesia, is looking for a large market growth opportunity from this condition. On the other hand, there are several challenges faced by Triple Nexguard Indonesia in dealing with black swan conditions and intense competition, such as product allocation and priority from global market supply, inability to produce locally with acceptable time-to-market. From the research, it is concluded that Triple Nexguard is positioned as the highest protective mask that provides quality assurance with advanced quality screening and strong brand equity with international medical organization patents, with the main target market of people who are very worried and worried about their masks. behavior of the wearer during a pandemic situation. According to this research, the Triple Nexguard Indonesia digital marketing strategy project stream is divided into two major activities that can be carried out in parallel. The first activity is a content marketing strategy that emphasizes strengthening product information content to build brand awareness. Then, the e-commerce strategy focuses on transactional processes. Both strategies stem from consumer behavior that can influence customer paths and journeys.



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INTRODUCTION

As a result of the Covid-19 pandemic, three new consumer trends have emerged (Ali, 2020). First and foremost, as a result of social distancing and large restrictions, consumers are turning to low-contact (online) transactions (Hohtoulas, P., Phan, A. T., Mheen, P. van de, Kwan, E., & Kwan, 2020). Second, also align with social distancing impact, with introverted customers favoring the cocooning lifestyle more than before. Third, people will be more concerned about their health.

In addition to preventing the outbreak transmission, aligning with WHO recommendations and regulations on the health protocols during the COVID-19 pandemic, the Indonesian government also declared mandatory health protocols regulations. According to the Indonesia Ministry of Health and Indonesian COVID-19 Task Force, the “5M Health Protocols” campaign was socialized ever since the outbreak happened (Potia & Dahiya, 2020). The 5M Health Protocols are:

- Wear a mask properly wherever you go
- Wash your hands with soap and running water regularly
- Maintain a safe distance of 1.5 to 2 meters
- Avoid crowds or any social gathering
- Limit mobility unless for emergency

Despite the acceleration of vaccination being targeted by the government after a year of the pandemic, the “5M Health Protocols” still become a mandate that should be obeyed by all Indonesian citizens. As wearing a mask becomes the first and foremost mandatory health protocol, this creates a huge shift and a big explosion in the mask products market (Febe & Ilena, 2021).

During the COVID-19 pandemic, there will be an increase in demand for mask products all over the world. No single country will be able to supply the rising demand for mask products. Some countries have added new production capacity, and supply is likely to grow as governments push businesses to shift output and businesses identify new opportunities. However, certain countries lack industrial capacity, specialized machines, and, more critically, input access. As the shortage eases, the goal should be to return to a more cooperative and open trade climate, where export limits are abolished and the global value chain for mask products can fully deliver to all those in need, especially in areas where the epidemic is spreading. The increase in government investment in masks production drives

the growth of the global masks market. This creates a dynamic-changing in the mask products market and global supply chain (Abdullah & Suliyanthini, 2021).

According to Allied Market Research, the global mask products market generated \$1.52 billion in 2019 and is expected to reach \$2.45 billion by 2027, growing at a CAGR of 4.4 percent between 2021 and 2027. Asia-Pacific contributed the most to the overall market share in 2019, accounting for about two-thirds of the total market share and will continue to do so throughout the projected period. North America, on the other hand, is predicted to increase at the fastest rate of 5.9% from 2021 to 2027 (Coffey et al., 2020).

Likewise, the other countries that are facing the undersupply and contraction in mask products market supply due to the COVID-19 pandemic, Indonesia also facing the mask products shortage in the early phase of the outbreak. According to the Central Statistic Agency (Badan Pusat Statistik, 2020b), in the first quarter of the COVID-19 outbreak in Indonesia, mask products became the second-highest rank for the most increased sales, for the cloth mask itself, the increment reached more than 6 Mio mask products only from the e-commerce channel.

To alleviate the scarcity, the government began importing PPEs including mask products to meet the country's demand. Indonesia imported 2,993.34 tons of Personal Protective Equipment (PPE) garments worth US\$ 43.48 million from January to May 2020, according to the Central Statistics Agency (Badan Pusat Statistik, 2020c).

In Q2 2022, many companies in Indonesia start to take the opportunity to fill the mask products shortage supply, to keep up and survive during the pandemic storm which impacts their sales. Many industries shift to produce mask products and other PPE, from the ones that are closely related to the PPE and mask products industries like textile, or even the ones that have the distinct industries, like the agribusiness sector. One of the biggest local textile companies claimed that they can produce the PPE, including mask products, in which 100% of the raw materials and production are from Indonesia and have passed ISO 16604 Class 3 and met the international standards set by the World Health Organization (2020). According to the Indonesia Ministry of Health (KEMENKES), the number of mask producers increased by more than 200%, before the pandemic, there were only around 20 licensed mask producers, by the mid of 2020, it increased to around 70 licensed mask producers. Local producers' availability of shifting production, on the other hand, may create the red ocean market for mask products. In addition, the abundance of imported mask products from existing players or new players who are also eyeing the Indonesian market as their export destination.

Based on data from the Medical Equipment Monitoring Dashboard (DMA) by Indonesia Industrial Ministry (KEMENPERIN), the need for N95 masks throughout 2021 is projected to reach 11 million pieces, while the domestic production capacity of N95 masks is estimated at 3 million pieces per year. Meanwhile, for medical masks, there will be a surplus, with the production capacity of medical masks reaching 3 billion pieces, while the need is around 176 million pieces. Further, Indonesia's Minister of Industry said the domestic mask products industry has a production capacity of 3 million N95 medical masks and 4.7 billion surgical masks per year. This amount is very abundant compared to domestic needs which are only 172.2 million per year. This surplus can be one of the triggers of the fierce competition in mask products market industries. In the next few years, however, product innovation and strong marketing methods will generate new chances.

In the current COVID pandemic outbreak, this research will look at how to mask products that have become a market icon in the following section. They contend that because of their high visibility as a consumption object that is always worn in public and literally on the most visible part of the body – one's face – they are the most significant symbol of pandemic reality. Mask products have been the most visible item defining Covid-19 since the outbreak of the pandemic, an epochal public health disaster that began in a realm where the market did not play a significant role. Mask products, first appeared as "contextual icons," or artifacts that had the synecdochical property of summarizing and reflecting the global public health response to the pandemic. Then, it can see how masks evolved from epidemic icons to marketplace icons (Feng et al., 2020).

Even before the Covid-19 outbreak and the economic downturn, brick-and-mortar businesses were at odds with Amazon and other e-commerce giants. Those difficulties have now escalated at a breakneck pace. According to the newest McKinsey study, customers are expected to maintain their previous habits in the face of stay-at-home orders, such as more online buying and fewer mall trips. During the COVID-19 crisis, the digital economy exploded. People went to the internet purchasing in

greater numbers than ever before as they embraced social alienation. COVID-19 has caused 67 percent of consumers to change their shopping habits. Retailers rose to the occasion, not only by encouraging more online purchases but also by embracing developing technology that allowed them to engage with customers and improve their customer experience (Iswara, 2020).

During 2020, according to a McKinsey study, at the peak of the pandemic, 20-30% of companies shifted online, and by the end of 2020, online grocery penetration had reached 9-12 percent. The other new shopping habit is social media shopping. Several social networking networks took advantage of increased online retail demand by adding more commerce capabilities, allowing shoppers to browse and purchase products from participating online stores without ever leaving the platform. These platforms are often tightly connected with eCommerce systems, allowing e-commerce operators to quickly promote their products across numerous channels. Social commerce accounted for 3.4 percent of overall eCommerce sales in 2020, and that percentage is anticipated to rise. However, social networks are providing more opportunities than ever before to contribute to total retail sales, and it isn't simply through on-platform shopping. Social media channels, according to the majority of Millennials and Gen Z, are a better location to discover new products than online search (Goel & Haruna, 2021).

Ultimately, during the pandemic, customers tend to have a Coronavirus-friendly fulfillment shopping experience. From the raising of the online shopping experience, contactless payment, and even social distancing product delivery. According to eMarketer, the number of people who used proximity mobile payments in 2020 increased by 22.2 percent year over year. It's unrealistic to anticipate internet transactions to completely replace all in-person purchases. That's why, throughout the pandemic, significant progress was achieved in various contactless payment solutions (Kenyon & Sen, 2015).

The pandemic has hastened the transition to a more digital environment and prompted changes in online buying habits that are likely to have long-term consequences. According to research from the United Nations Conference on Trade and Development (UNCTAD), the amount of shopping on digital platforms has increased by up to 65 percent in 2020. The impact of the Covid-19 pandemic, which has curtailed people's mobility, is inextricably linked to this. So to speak, the COVID-19 epidemic has permanently altered online shopping habits. Since the globe proceeds from pandemic response to recovery, the worldwide acceleration of online purchasing emphasizes the importance of ensuring that all countries can take advantage of the potential given by digitization. Further, based on UNCTAD survey results, consumers in emerging economies have made the greatest shift to internet purchasing, and cosmetic and personal care (including mask products) and electronic goods are the most climbed product categories (Kraft et al., 2020).

Likewise in Indonesia as one of the emerging countries, since the government has been obliged to introduce mandatory activity limits as a result of the Covid-19 outbreak, this has paralyzed physical activity, resulting in a dramatic surge in online sales (Dhillon et al., 2020).

According to the Central Statistics Agency's (2020a) paper "Big Data Review on the Impact of Covid-19 2020," internet sales during the epidemic increased dramatically when compared to sales in January 2020. Online sales in March 2020 increased by 320 percent from overall online sales at the start of the year. The dramatic surge happened in April 2020, with internet sales increasing by 480 percent from January 2020. In detail, the greatest sales in March 2020 were in Food and Beverage, which climbed by 570 percent from January 2020. Sports products saw the smallest rise in sales, up only 170 percent from January.

In addition to that, during the first quarter of the COVID-19 outbreak in 2020, several products contribute the highest sales incremental in e-commerce; mask (cloth) product at the second rank after the internet voucher package with a 6-million-unit gap compared to before pandemic sales.

This research is conducted to answer the following research objectives to find out the best way to position vis-à-vis competing brands in the mask segment. And to set and implement the digital marketing strategy to be competitive and reflect the Triple Nexguard Indonesia positioning in the mask segment.

RESEARCH METHODS

This research used both quantitative and qualitative data collection. The quantitative data is obtained from the external online survey of consumer behavior with the convenience sampling method. The external surveys are launched in parallel with channel observation which will focus on the mask products profile market mapping and the consumer behavior in the process of a purchase transaction. Then, a qualitative interview approach to gain a more depth analysis of the consumer behavior and their journey when purchasing mask products via online channels (Hartono, 2004). The result is the comprehensive data of profile market mapping and consumer behavior of mask products consumers on online channels that can be analyzed to build a competitive digital marketing strategy. This research will also explore business problems by conducting external and internal analyses. In the external analysis, the framework that will be used is PESTEL and Porters' five force analysis. In the depth of that, the competitor and customer analysis will also be used to gain more insights. The internal environment analysis uses VRIO analysis. From the combination of the external and internal analysis, the SWOT will be built to help us define the next actions. Since the focus is on the digital marketing strategy, the digital marketing framework will also be used to align the analysis on the shifting of current market conditions (Sugiyono, 2017).

RESULTS AND DISCUSSION

External Analysis

a. PESTEL Analysis

The PESTEL (POLITIC, ECONOMIC, SOCIAL, TECHNOLOGY, ENVIRONMENT, and LEGAL) analysis is an analysis tool of an organization's external macro-environment. It is a useful tool for understanding the political, economic, socio-cultural, and technological context of an organization. It can be used to evaluate market growth or decline, as well as a company's position, prospects, and strategy.

b. Five Porter's Forces Analysis

Porter Five Forces is a holistic strategy framework that deviates beyond only assessing the current competition to make strategic decisions. The Porter Five Forces analysis looks at how Triple Nexguard can create a long-term competitive advantage in the mask product business. Michael Porter identified five forces that have a substantial impact on a firm's profitability in its industry in his groundbreaking article "Five Forces that Shape Strategy." The Porter Five Forces are as follows.



Figure 1 Five Porter's Forces Analysis

c. Industry/Competitor Analysis

Based on data from the Indonesian Ministry of Health, the number of masks produced before and after the Covid-19 pandemic increased significantly. During the COVID-19 pandemic, regarding mask product fulfillment, there are several phases in the supply chain of production and distribution. The earliest phase was in the early period of the outbreak, the existing market players such as Triple Nexguard and Sensi were struggling to fulfill the skyrocketing demand. The scarcity happened during that period since the "black swan" conditions happened. In the second phase of the pandemic, many big companies scramble to grab that opportunity by expanding their line of business, many local players diversify their business into mask production as well as imported products entered which make the red ocean for the Indonesia mask market.

d. Customer Analysis

From February 25th – to March 7th, 2022, the questions were performed online using Google Form by the requirement the of Slovin method with the convenience sampling approach. As screening questions, the author was able to collect data from 400 respondents who had used masks in the previous 6 months and had purchased masks in the previous 12 months. The qualitative also performed with an in-depth interview to gain more insight into consumer behavior and customer journey of purchasing mask products.

Digital Marketing Concept Test

In the digital marketing concept test, three concepts will be tested:

1. KOL/Influencer

There is 53.4% of the respondents opine that a Key Opinion Leader or Influencers on social media will influence the purchase decision on mask products. The majority of the respondents that claimed: “Yes” are coming from the “less than 18 years old” age cohort (100%) and “18-29 years old” age cohort (64%). While the majority of the respondents that opine KOL/influencer will not influence the purchase decision of mask products are coming from the “30-49 years old” age cohort.

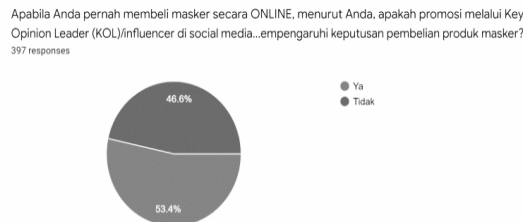


Figure 2 Concept Test on KOL/Influencer

There are 75% of the respondents opine that doctor or medical expertise will be the fittest Key Opinion Leader/influencer for the mask products. While 21% of respondents opined that public figures or actors/actresses will do.

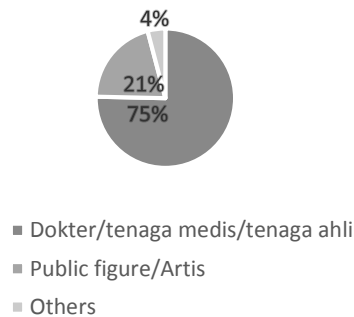


Figure 3 KOL/Influencer Preference

2. PopAds Promotion

On the PopAds promotion concept test (e.g. advertising that pops up on Instagram or Youtube), 54.8% of respondents opined that PopAds as one of the inbound marketing strategies will effectively drive consumers to do a “call to action” on buying mask products.

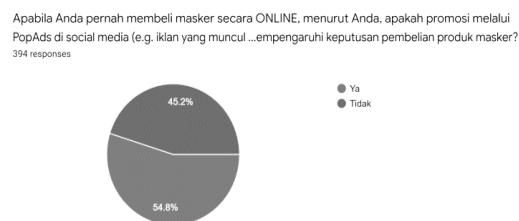


Figure 4 PopAds Promotion Concept Test

3. Product Placement

On the Product Placement concept test, 53.6% of respondents opined that Product Placement in the online media for mask products will impact the purchase decision to buy mask products. Of the respondents that say “Yes”, 45% claimed that short-form video on social media will be the effective way to place the product, and 29% claimed that Youtube content will be the most effective media to place the product.

Apabila Anda pernah membeli masker secara ONLINE, menurut Anda, apakah promosi melalui Product Placement di media online (e.g. product...empengaruhi keputusan pembelian produk masker?
 390 responses

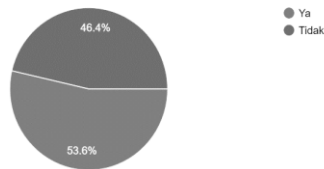


Figure 5 Product Placement Concept Test

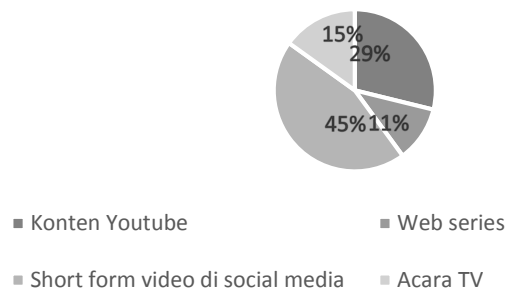


Figure 6 Product Placement Preferences

4. Content Shop

On the content shop concept test, 53.8% of respondents opined that the live streaming shop or content shop in social media/e-commerce such as TiktokShop will not influence the purchase intention for mask products.

Apabila Anda pernah membeli masker secara ONLINE, menurut Anda, apakah promosi melalui Live Streaming / Content Shop di social media/e-com...mpengaruhi keputusan pembelian produk masker?
 392 responses

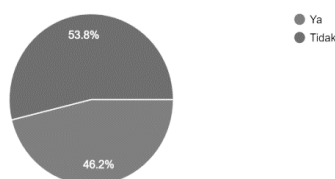


Figure 7 Content Shop Concept Test

Internal Analysis – VRIO

The VRIO framework is a strategy tool that helps organizations identify the resources and capabilities that give them a sustained competitive advantage. Based on the VRIO Analysis that has been done, it can be concluded that the Sustainable Competitive Advantages of Triple Nexguard are in intangible resources, which are **Brand Equity** and **Innovation**.

SWOT Analysis

The SWOT analysis may be utilized to dive further into and summarize the prior external and internal research. To extend the analysis, TOWS matrix is helpful for Triple Nexguard to know what they should do in response to each factor and craft the best suitable business strategy. Below is the TOWS Matrix, with highlighted factors from SWOT, of Triple Nexguard:

Table 1 TOWS Analysis of Triple Nexguard

IFAS (Internal Factor Analysis Summary)	Strengths (S)	Weaknesses (W)
	EFAS (External Factor Analysis Summary)	S1: Strong company culture in promoting an innovation mindset S2: High-quality product with high brand equity
Opportunities (O)	SO-Strategy	WO-Strategy
O1: Mandatory obligation to use mask products during COVID-19 pandemic O2: Rapid digital transformation with e-commerce platforms O3: Indonesia is the 4th largest population	(S1&S2-O1&O3): Product development in creating more variety of mask products with high quality (S1-O2): Leveraging brand recognition in online channels	(W1-O1&O3): Develop mask model type with variance color (W2-O2): Develop a strong and effective digital marketing plan on Triple Nexguard, especially for mask products
Threats (T)	ST-Strategy	WT-Strategy
T1: Uncertain economic situations due to pandemic T2: Rising digital marketing dark horse T3: Intense competition among existing players and new entrants T4: Forecasting the decreasing and shifting demand when COVID-19 become endemic	(S1-T1&S2-T2&S1-T3&S2-T4): Triple Nexguard SCA in high-quality products and patent and innovation enabled the Company to differentiate its products: - T1: high-quality mask product with fashion design that categorized as a need during the pandemic - T2,T3&T4: that can be useful to threaten the industry disruptors	(W1-T1): Allocate resources to optimize the utilization level in the consumer healthcare business unit (W2-T2&T3): Analyze the various trends within the sector and optimize its SCA which is innovation and human resources to develop new products and market them creatively, effectively, and efficiently

Proposed Segmentation, Targeting and Positioning

Before setting the product positioning, the first step is to define the market segment based on the research survey result as follow:

Table 2 Mask Product Market Segmentation

Segmentation Type	Segmentation Sub Type	Market Segment
Geography	Domicile	Indonesia
Demography	Gender	Male, Female
	Age Cohort	Baby Boomers, Gen X, Gen Y, Gen Z
	Social Economic	Poor, vulnerable, aspiring middle class, middle class, upper class
Behavior	Reason to use	<ul style="list-style-type: none"> • Professional requirement • Protection amid COVID-19 • Protection against any virus • Protection against dust & pollution • Government mandatory
	Mask Wearer Behavior	<p>-Full Metal Jacket: Very worried</p> <p>-Nervous Face Mask Wearer: Worried</p> <p>-Socially Conscious Face Mask Wearer: Worried for others, but not themselves</p> <p>-Pocket Face Mask Carrier: Not concerned</p> <p>-Freedom Fighter: Not at all concerned</p>
Psychographic	Interest	<ul style="list-style-type: none"> • Brand minded vs non-brand minded • Active social media user vs non-active social media user

From the market segmentation for the mask, the primary target market for Triple Nexguard Indonesia is :

Table 3 Primary Target Market

Segmentation Type	Segmentation Sub Type	Target Market – Primary
Geography	Domicile	Indonesia
Demography	Gender	Male, Female
	Age Cohort	Gen X, Gen Y
	Social Economic	Middle class, Upper class
Behavior	Reason to use	<ul style="list-style-type: none"> • Protection amid COVID-19 • Protection against any virus
	Mask Wearer Behavior	<p>-Full Metal Jacket: Very worried</p> <p>-Nervous Face Mask Wearer: Worried</p>
Psychographic	Interest	<ul style="list-style-type: none"> • Brand minded • Active social media user

From this primary target market, the formulation of Triple Nexguard positioning as follow:
 “For non-medical user with high-risk exposure during pandemic, Triple Nexguard mask/respirator is the mask/respirator with highest protection that delivers quality assurance with advanced quality in filtration and strong brand equity because only Triple Nexguard mask/respirator has international medical organization patent with Triple Nexguard advance filtration, and give conformity with stylish look with exclusive hygiene packaging.”

Proposed Marketing Mix

Table 4 Ps Marketing Mix Summary

Product	Triple Nexguard Daily Mask	Triple Nexguard Extra Comfort	Triple Nexguard KF94
Brand Category	Fighting Brand		Premium Brand Product
Price Strategy	Competitive based pricing		Value-based Pricing
Place	<ul style="list-style-type: none"> • Online channel: e-commerce, social media shop • Offline channel: modern trade and modern pharma 		
Promotion	<ul style="list-style-type: none"> • Online : KOL/influencers, PopAds, Product placement • Offline : Store display, discount, bundling 		
People	<ul style="list-style-type: none"> • Direct: Sales, customer service, marketing, KOL/influencer • Indirect: all company employees 		
Process	<ul style="list-style-type: none"> • Customer journey online : via e-commerce/social media shop • Customer journey offline: buy in store 		
Physical Evidence	Daily mask, daily hijab mask, carbon active mask, kids mask	Triple Nexguard Extra Comfort Color : Pink, Purple	Triple Nexguard KF94 Color : White,Black

Digital Marketing Strategy Formulation

In order to win the fierce competition amid the digitization market, Triple Nexguard should formulate and implement the digital marketing strategy as follow:

a) Content Marketing Strategy

Table 5 Content Marketing Strategy Summary

Steps	Content Marketing
Goal Setting	Sales growth, brand building
Audience Mapping	Customer persona : Primary Target Market
Content Ideation and Planing	Content theme : The high-quality with advance filtration consumer mask Content format and mix:Instagram Pop Ads, Youtube Short video form, Facebook and Instagram KOL/influencers Content schedule: amid COVID-19

Steps	Content Marketing
Content Creation	By agencies
Content Distribution	Owned channel, paid channel, earned channel
Content Amplification	Creating content conversation, using buzzers and influencers
Content Marketing – Evaluation	Content marketing metrics: Sales growth, conversion rate, low churn rate, brand awareness, brand recognition, brand advocacy
Content Marketing Improvement	Review the current content marketing via social media listening

b) E-commerce Strategy

According to the selected primary target market, the age cohort that Triple Nexguard will tap in is Gen X and Gen Y. This research will focus on the online shop approach strategy as the user experience and user interface will be the main focus for the online shop, such as:

- Marketplace (Tokopedia, Shopee)
 - Official Store (B2C)
 - Reseller (C2C)
- Direct to Consumer (company website - online shop)

Based on Harvard Business Review (2021), there are several ways to strengthening the customer experience when doing online shopping in the e-commerce, this strategy can be used for Triple Nexguard for enhancing the e-commerce customer experience:

- Understanding the customer behavior
- Create seamless experiences with organizational data
- Information sharing for enhancing customer experience
- Moving forward with Artificial Intelligence

CONCLUSION

COVID-19 pandemic creates a significant impact on socio-culture and consumer behaviors, such as the mandatory health protocols, the quarantine, and restrictions. Significant demand for mask products and shifting to online shopping transactions become the black swan phenomenon in the retail segment. Triple Nexguard masks is one of the incumbent mask players in Indonesia affected by these two phenomena. At the same time, Triple Nexguard Indonesia also facing several challenges in terms of supply chain issues, such as the product allocation has been prioritized for major markets outside Indonesia and the inability to manufacture locally with acceptable time-to-market, also in the face-paced market and fierce competition, such as the raising of digital marketing dark horse and evolving of style mask products. With all these challenges, Triple Nexguard Indonesia will set their product positioning in the market and set - implement the digital marketing strategy to be competitive and reflects the Triple Nexguard Indonesia positioning in the mask segment.

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