Tracking Survey:

Third (Final) Wave

THE IMPACT of COVID-19 on the DEVELOPMENT SECTOR in INDONESIA

SARASWATI
development innovation

love frankie

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KNOWLEDGE RESEARCH ANALYTICS

Introduction

COVID-19 is presenting new challenges to those across the development sector who work to combat poverty and inequality.

To better understand these challenges, **Saraswati**—in collaboration with **Polling Center** and **Love Frankie**—conducted the *third and final wave* of a monthly **Tracking Survey: Impact of COVID-19 on the Development Sector in Indonesia** from 1–8 September 2020.

128

respondents

completed the questionnaire for this final wave, which was distributed via email and social media.

This report is a summary of the key findings from this third and final survey compared to those of a similar sample of respondents from the first and second surveys.

The summary report from the first wave survey, conducted from 6-13 May, can be downloaded here.

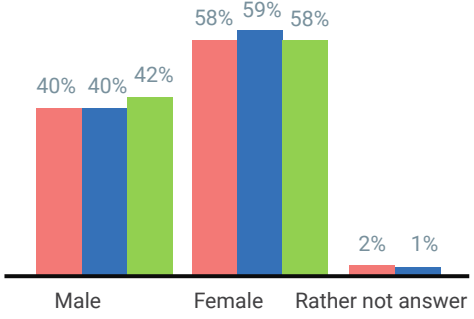
The summary report from the second wave survey, conducted from 8-13 June, can be downloaded here.

The summary report from the expert survey, conducted from 8-15 July, can be downloaded here.

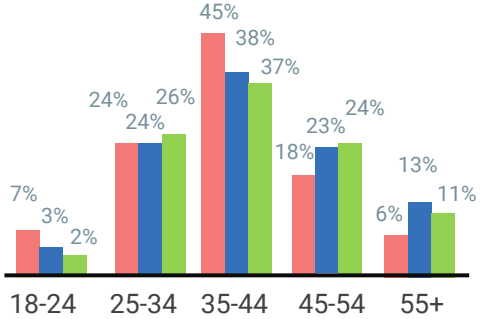
This survey initiative is self-funded.

Respondent Profiles

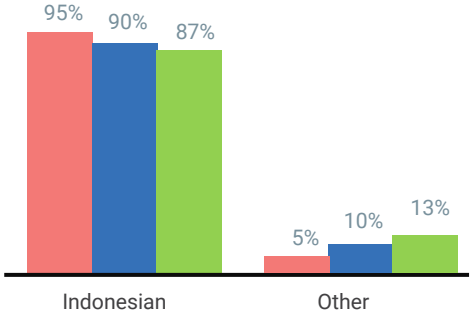
GENDER



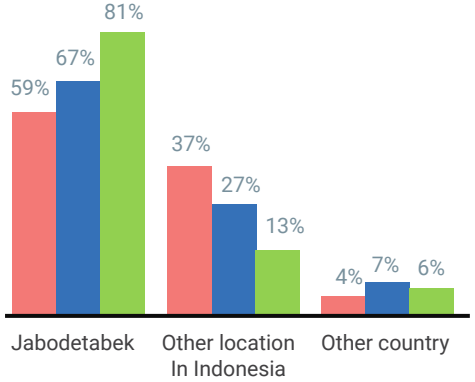
AGE GROUP



NATIONALITY

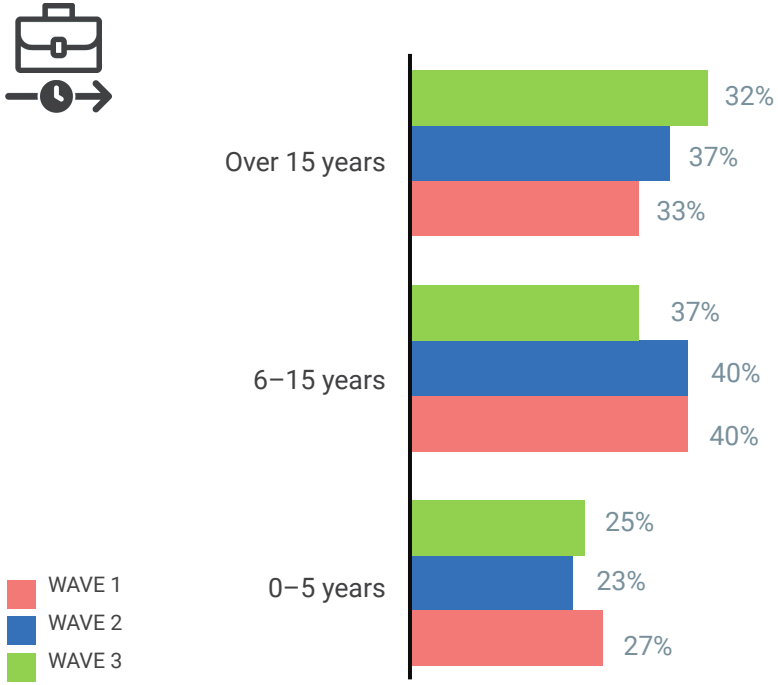


AREA

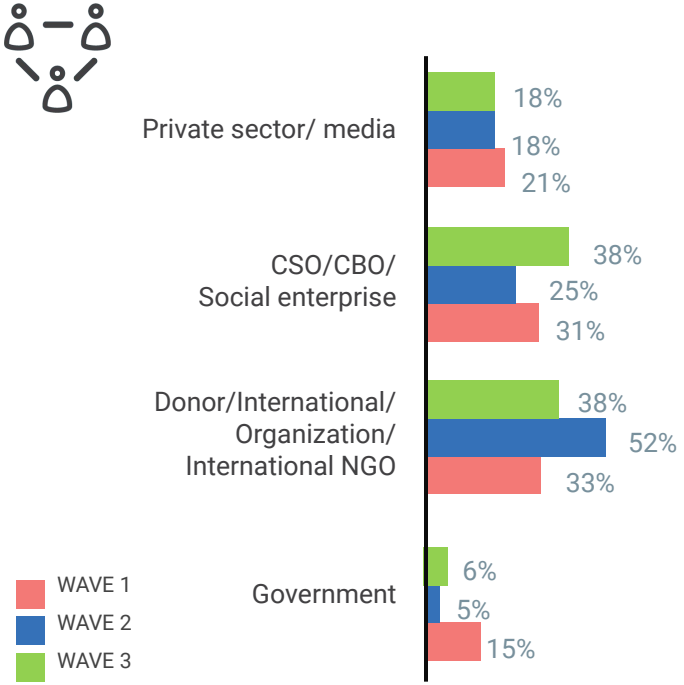


Respondent Profiles

WORK EXPERIENCE



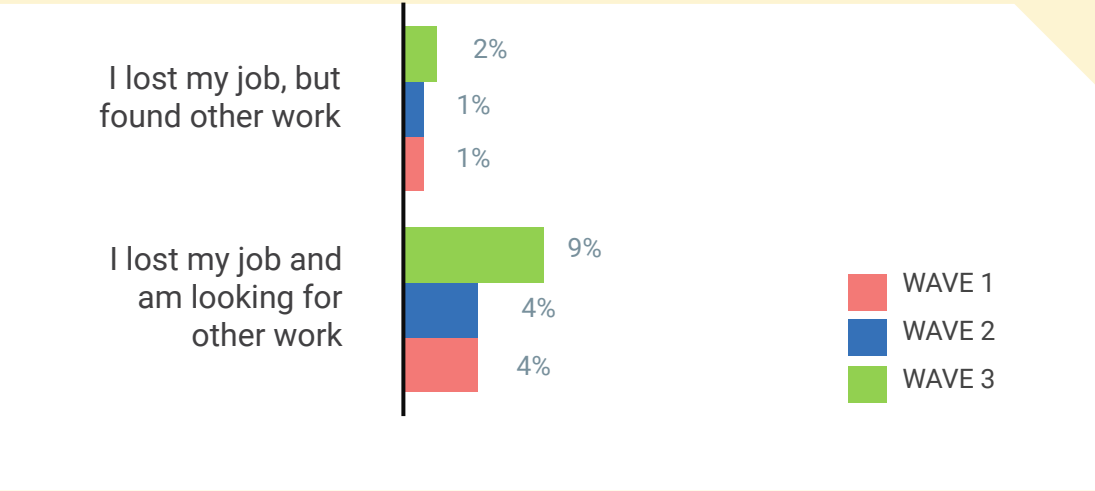
TYPE OF ORGANIZATION



Working Conditions

Significant change

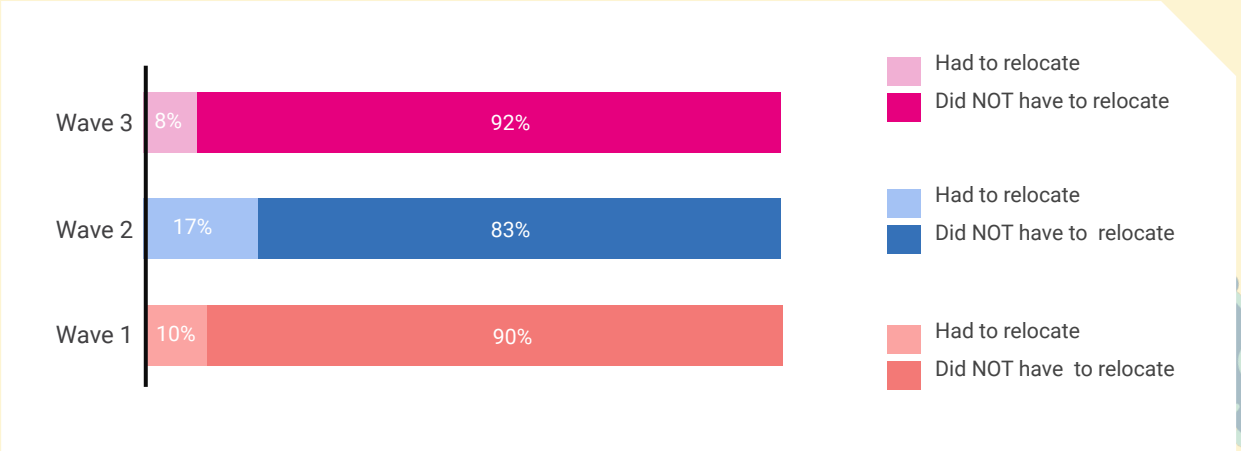
- **More than twice as many respondents have lost their jobs (11%), compared to respondents in either of the two previous surveys (5% in both).** *(Note: a greater percentage of respondents for this survey live in the greater Jakarta--Jabodetabek--area.)*



Working Conditions

Significant change

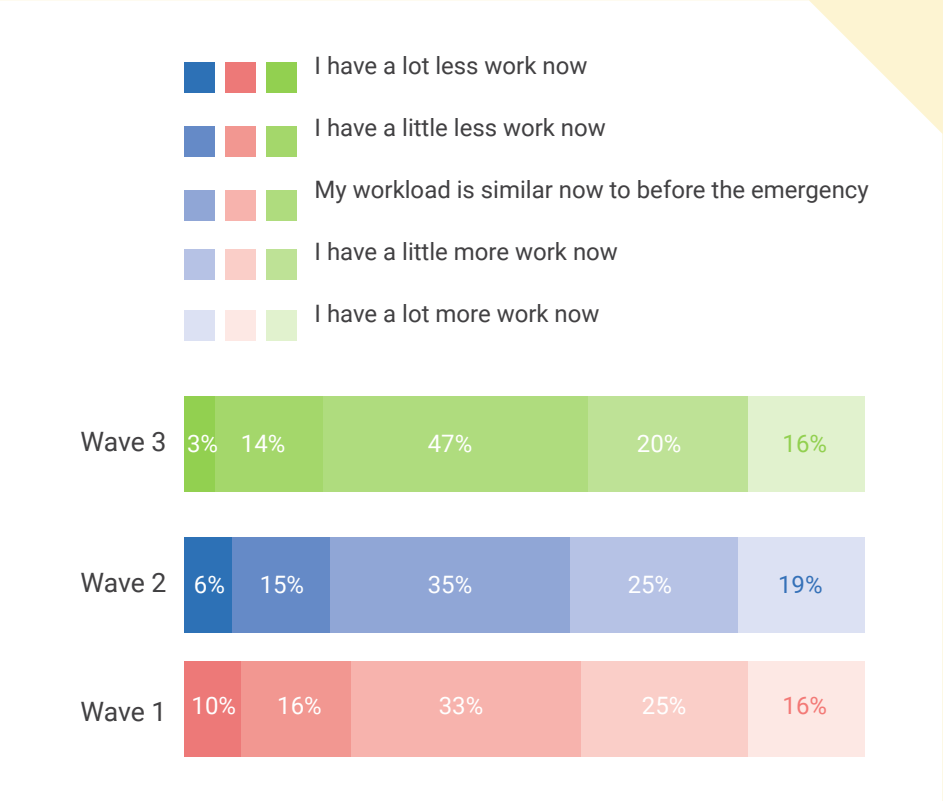
- **Fewer respondents have had to relocate compared to the last survey**. But respondents with five or less years of experience were more likely (18%) than those with over 5 years of experience (4%) to have relocated.



Working Conditions

Significant change

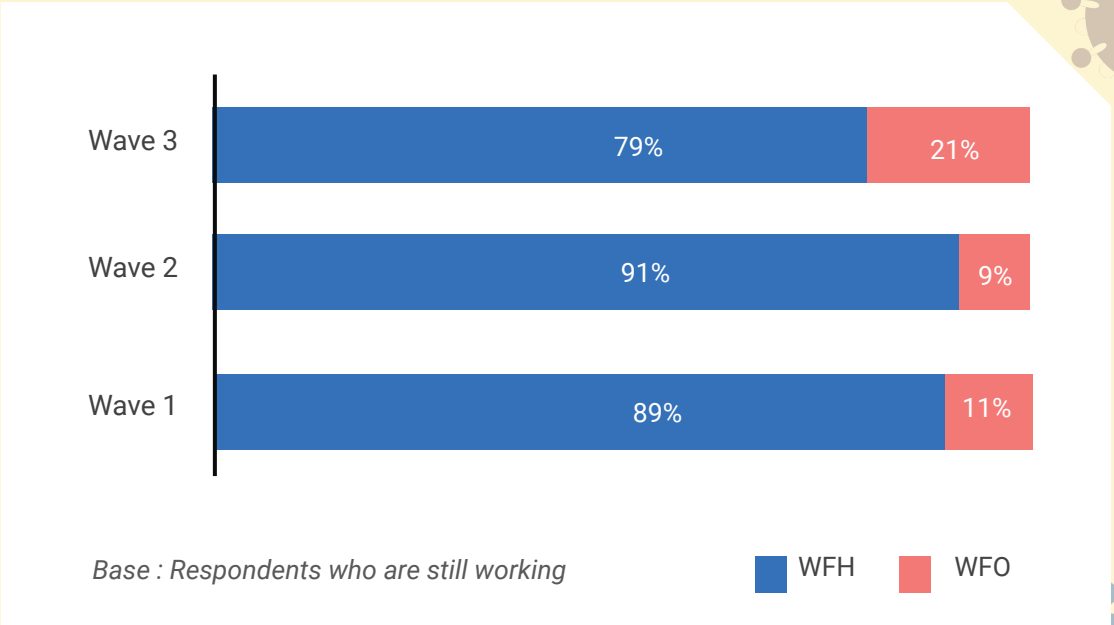
- **Workloads are starting to return to pre-pandemic levels**. Only 3% of respondents say they have *a lot less* work now than before the pandemic (compared to 10% in the first wave), and **47% say that their workload is similar now to before the COVID-19 pandemic** (compared to 35% in the second wave and 33% in the first wave).



Working Conditions

Significant change

- **Fewer respondents are Working from Home (WFH) as opposed to Working from the Office (WFO)**. 79% of respondents in this survey are working from home, compared to 91% in the second wave and 89% in the first wave surveys. *(Note: Jakarta implemented stricter lockdown measures on 14 September—after this final survey was conducted.)*



Working Conditions

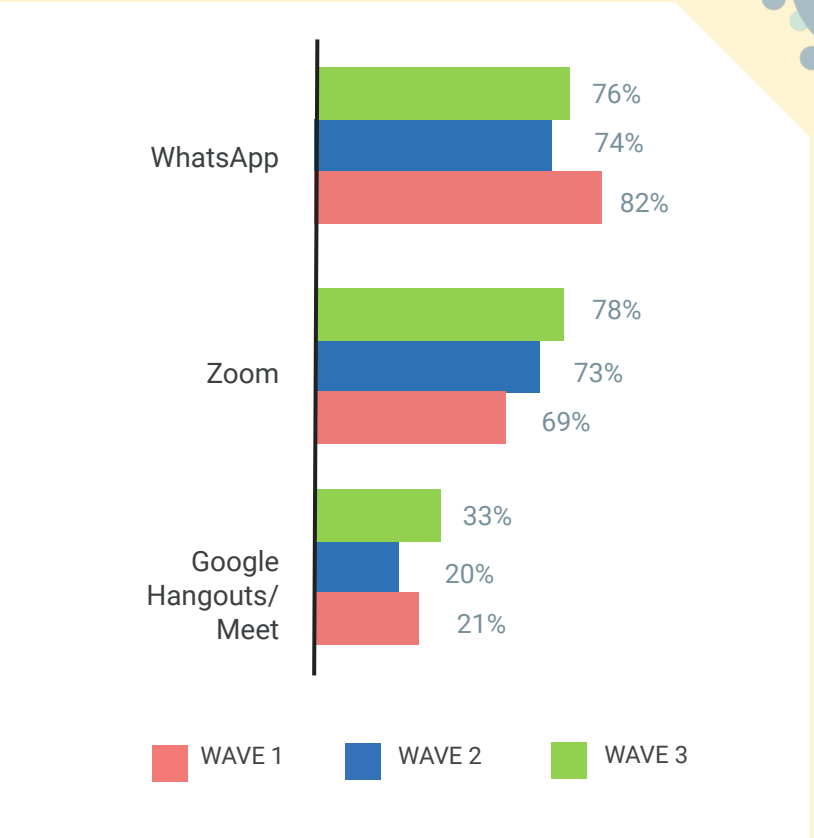
No Significant change

- **62% of respondents have experienced no change in their work status since the pandemic started (68% in the second wave and 65% in the first wave)**.
- Almost exactly mirroring the first and second wave responses, 19% of respondents have had their work roles adjusted, and 9% are working reduced hours.

The Use of Technology for Work

Significant change

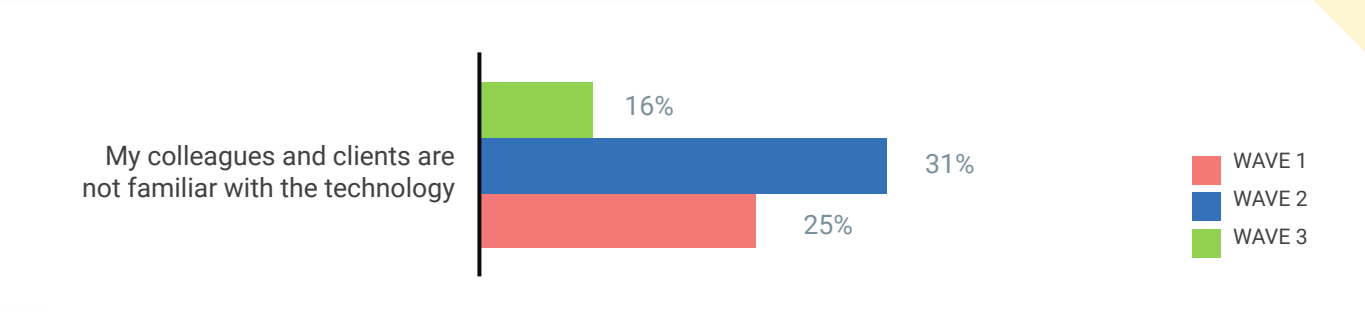
- **Use of Google Hangouts/Meet rose from 21% to 33% between the first and last surveys**—the only platform among ten to record such a significant rise during this period. Among respondents with five or less years of work experience, there was a jump from 24% (first survey) to 44% (final survey) who say that Google Hangouts/Meet has been useful for work since the beginning of the COVID-19 emergency.



The Use of Technology for Work

Significant change

- **Respondents, as well as their clients and colleagues, are increasingly adapting to the use of technology for work**. Only 16% of respondents in this final survey said that colleagues and clients are not familiar with the technology required for work purposes, down from 31% in the second wave and 25% in the first wave. Similarly, 26% of respondents are not facing any challenges using technology, down from 20% in the second survey and 19% in the first survey.



The Use of Technology for Work

No significant change

- **Zoom (cited by 78% of respondents) and WhatsApp (76% of respondents) remain the two most useful tech tools for work purposes.**

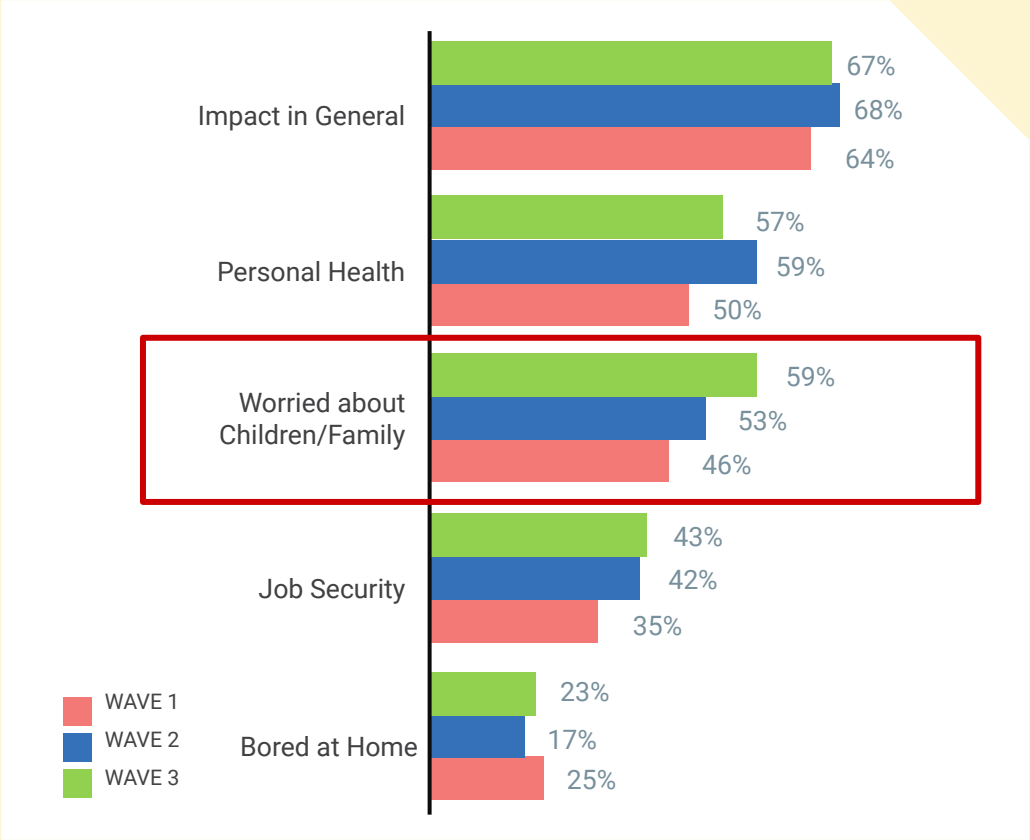
- **25% of respondents (compared to 31% in the second wave and 29% in the first wave) still say they need help using new technologies for work** when answering the question "*Which of the following best describes your current condition using technology for work purposes?*"

- While challenges in using technology for work at present are very similar in all three waves, the percentage of **respondents citing a preference for face-to-face communication as a challenge in adapting to using tech for work sustained at 27% in this final wave from 26% in the second wave, down from 37% in the first wave.** As noted in the second survey report, this could reflect adaptation to WFH and/or the fact that the respondents from donor institutions and international organizations are more strongly represented in these second and third waves.

Levels of Anxiety

Significant change

- Respondents are increasingly worried about their children and families.



Levels of Anxiety

No significant change

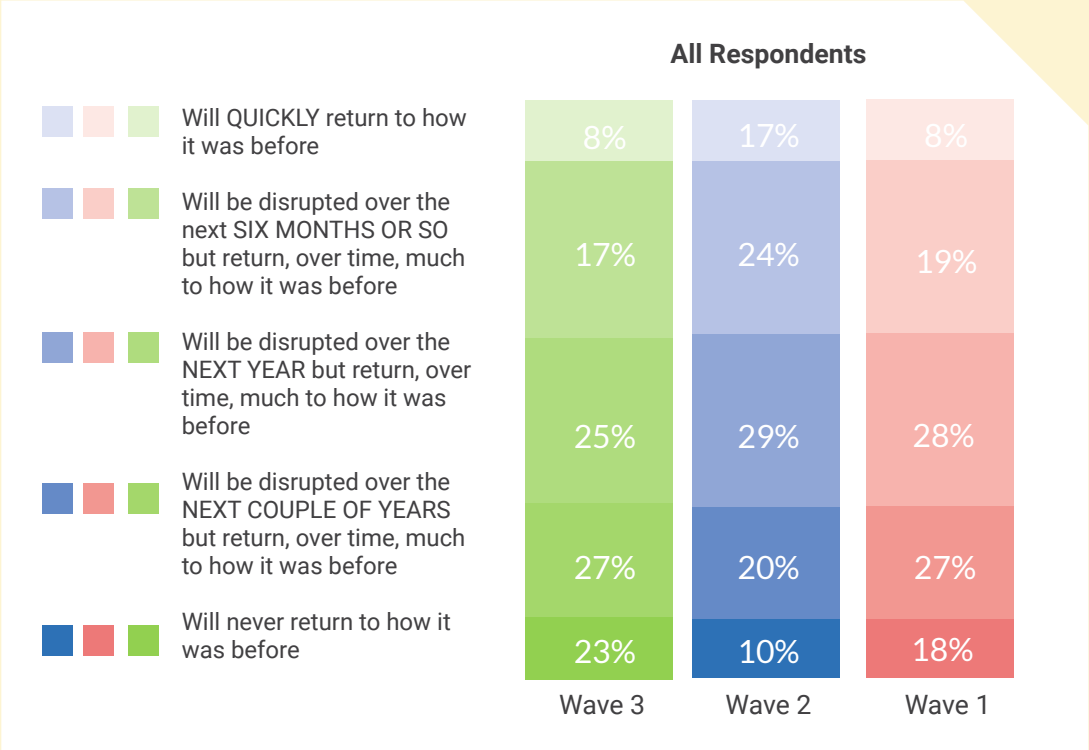
- **Almost everyone still has some feelings of anxiety about COVID-19**: 97% of respondents express some degree of anxiety (95% in the second wave and 94% in the first wave). The percentage of respondents admitting to *a lot of*, or *extreme* anxiety has risen slightly from 26% to 33% from the first to third waves.

- **Concerns about job security remain similar to those from the first and second waves**. 69% of respondents (68% in the second wave and 69% in the first wave) express some concern about their job security over the coming *two months*. This rises to 87% (87% in the second wave and 83% in the first wave) over the coming *twelve months*.

Perceptions about the Future of the Development Sector in Indonesia

Significant change

- **Respondents increasingly believe that development work will not quickly return to how it was.** Only 25% of all respondents think development work will quickly return to how it was, or will do so within the next six months (30% in the second wave and 45% in the first wave). This compares to 50% who think development work will be disrupted for at least the next couple of years or will never return to how it was (41% in the second wave and 27% in the first wave).



Perceptions about the Future of the Development Sector in Indonesia

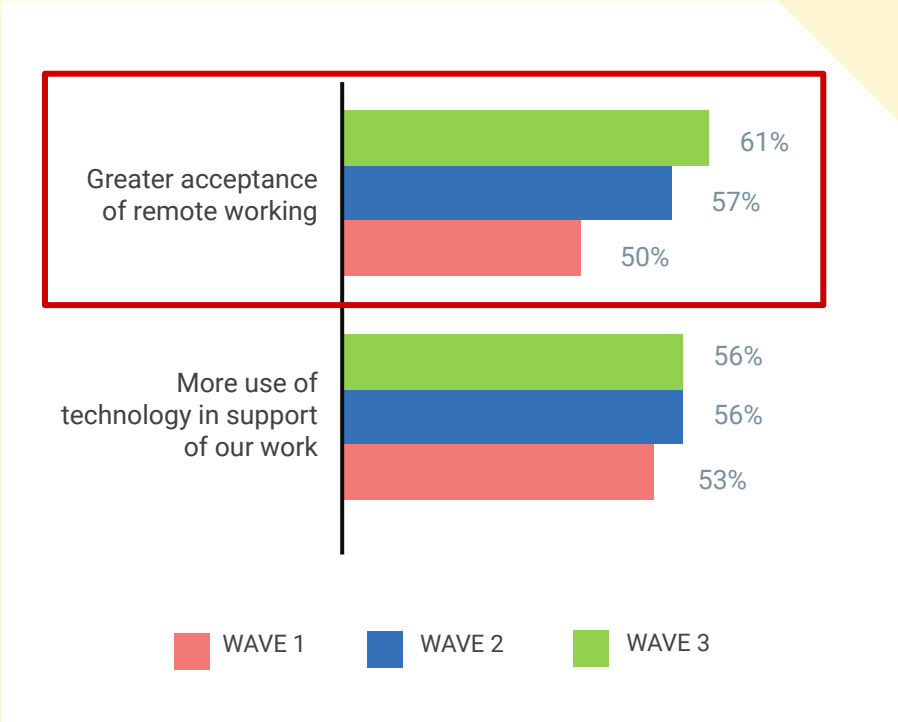
Significant change

- **There is an indication that non-Indonesian respondents and those currently living abroad are least confident of a quicker return to work as it was before the pandemic.** Not one non-Indonesian respondent or respondent of any nationality living abroad (*admittedly, from a sample of less than 30 respondents in each category*) thinks that development work will quickly return to how it was or return to how it was within the next six months.

Perceptions about the Future of the Development Sector in Indonesia

Significant change

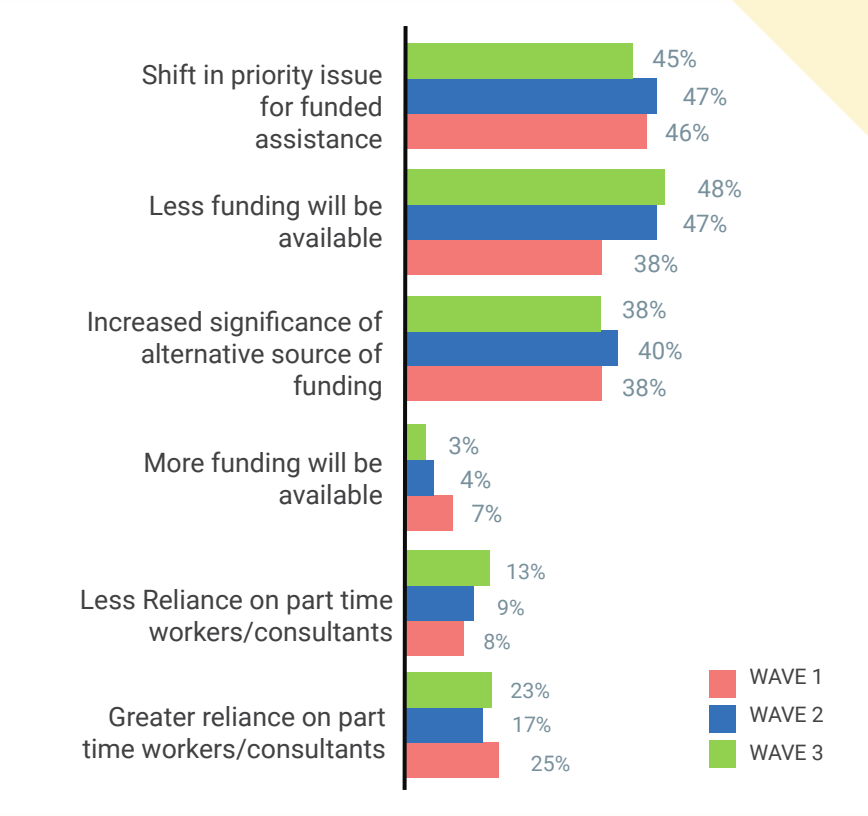
- **Respondents increasingly see COVID-19 as impacting the way we work going forward**. When asked to list up to three consequences of the pandemic on the development sector, there is **a small rise in respondents who now think there will be greater acceptance of remote working** (61% in this final wave; 57% in second wave; 50% in the first wave).



Perceptions about the Future of the Development Sector in Indonesia

No significant change

- **Almost half of all respondents (45% this wave, compared to 47% in the second wave and 46% in the first wave) still think that COVID-19 will result in a shift in priority issues for funded assistance**.
- **Respondents remain pessimistic about levels of funding going forward**.
- While (and, perhaps, because) respondents see overall funding levels as declining, **38% (compared to 40% in second wave and 38% in the first wave) see an increased significance in alternative sources of funding going forward**.



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