



COVID-19

Human Impact Tracker

Beauty and Skincare in the Time of Covid

The evolution of two increasingly intertwined categories

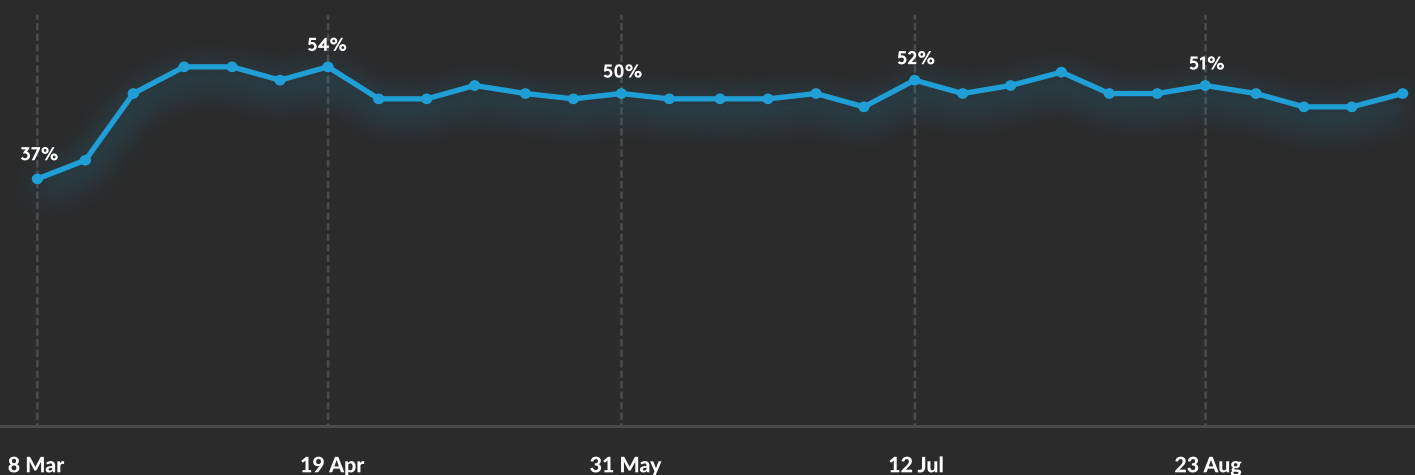
Many of us are desperately looking forward to the day when we can once again gather at sporting events, meet freely with friends and family, and leave home without double-checking for our mask and hand sanitizer. However, consumers might not be so eager to return to life exactly as it was before the pandemic...

Since the beginning of the year, Streetbees has been tracking the impact of Covid-19 on consumers' attitudes, emotions, and habits. In-the-moment conversations with hundreds of thousands of our bees (users) worldwide show that the changes we're seeing are widespread and deeply felt.

By leaving the house less and thinking about germs more, our daily routines have been turned on their heads. A third of consumers have altered their beauty and skincare habits in some way - and it looks like some of these changes might outlast the virus itself.



PROPORTION WHO ARE HIGHLY CONCERNED ABOUT GERMS



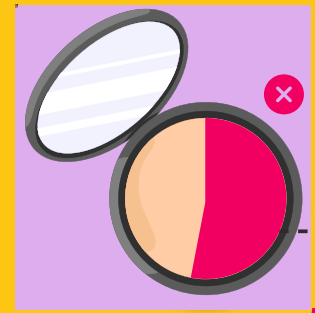
A Welcome Break from Beauty

We've never had to spend so much time at home before, avoiding almost all social contact. Our hygiene and personal care priorities have evolved as a result.

One stunning evolution has been the extent to which people have shunned the use of beauty products. Streetbees' Covid-19 Human Impact Tracker reveals a plummet in demand for beauty products at the beginning of the pandemic. Over half the consumers in the UK, US, China, and Brazil markets are wearing less makeup. (It's important to note here that this study includes both women and men. 44% of male bees who participated in the study wear some makeup, and of those, 39% report wearing less due to lockdown.)

Many of us are working more from home or have lost our jobs altogether. We haven't been able to go out as much as usual. It's only natural that we're spending less time and money on looking good.

Sales have crept up since the worst of the lockdown, but demand for makeup and cosmetics still hasn't returned to pre-covid levels.



52%

of consumers in the UK, US, China and Brazil are wearing less makeup

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My relationship with makeup has changed a lot, I hardly use makeup since the beginning of the pandemic. I use only an eyeliner to darken my eyebrows, there's no other makeup I really use anymore.

Female, 37, Brazil

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Since the pandemic started, I've stopped wearing make up as often since i wear a mask whenever I go outside and no one can see my make up with a mask on.

Female, 24, US

Merging Categories

Skincare products, on the other hand, have seen a massive spike in purchase intent. It's also worth observing that the increase outweighs the drop in demand for beauty products.

Beauty and skincare - historically distinct categories - actually seem to be merging. Even before the pandemic, the line between the two categories had begun to blur. The pressures of the pandemic have only enhanced and accelerated this transformation, just as they have done to so many other economic and societal changes that were already underway.

The correlation between wearing less makeup and investing more in skincare holds across countries. Almost two thirds (63%) of Brazilian consumers, for example, report wearing less makeup, while 69% report investing more in skincare. In the US, half are wearing less makeup and the same proportion is investing more in skincare.

However, it appears as though Chinese consumers are the exception. They are the least likely to have dialed down their beauty regimens. This market has increased the amount of makeup they're wearing the most.



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Now I try to take more care of my face, be more careful with my face and put these creams to keep my face moisturized, because now I have more time staying at home and I can use these products more.

Male, 20, Mexico



It's not only the country that's furthest ahead when it comes to the pandemic, but Chinese consumers have long since invested a lot in both skincare and beauty products, with many ancient beauty rituals and natural remedies balancing more modern cosmetic solutions. The exception, in other words, only proves the rule. Going forward in the post-covid economy, companies would do well to think of beauty and skincare as extensions of a single category.

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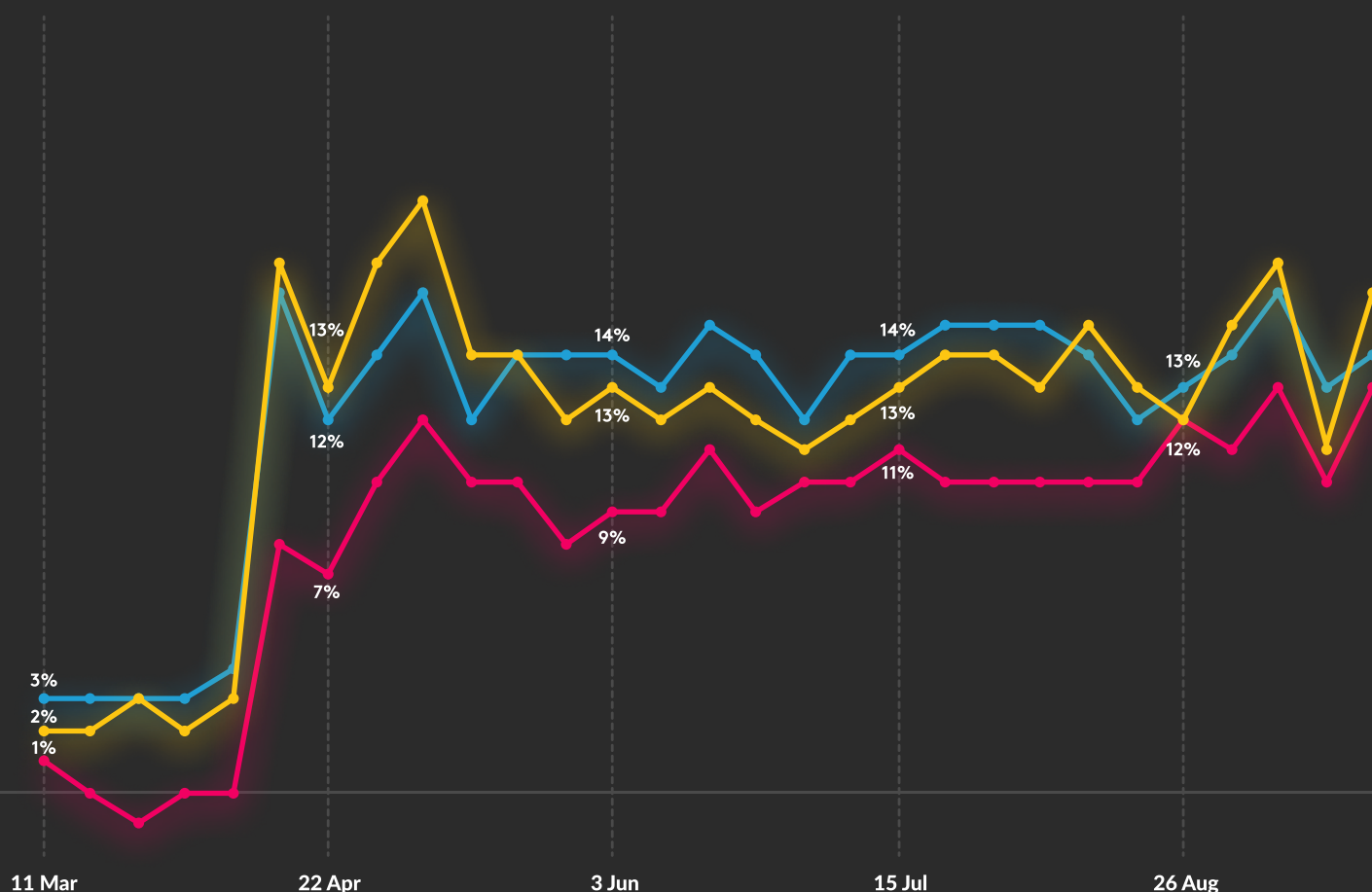
Recently, the most popular items are all natural or ones that contain natural extracts. I believe as our standard of living increases and our awareness of health and skin care increases that natural-based skin care will become a trend.

Male, 27, China

STREETBEES PURCHASING INDEX

(% purchasing more - % purchasing less)

Face wash Face moisturiser Hand/body moisturiser



“More important things to worry about”

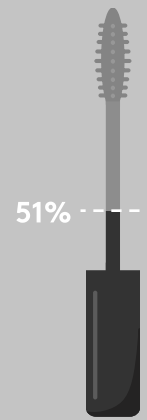
Over half (51%) of our bees report feeling more confident without makeup while outside the home. People in countries that have seen the largest drop in beauty usage (Brazil and UK) report feeling the most at-ease while bare-faced.

The leading reason people give for feeling more confident is that they are masked. Other top reasons include just feeling happier about how they look and caring less about it.

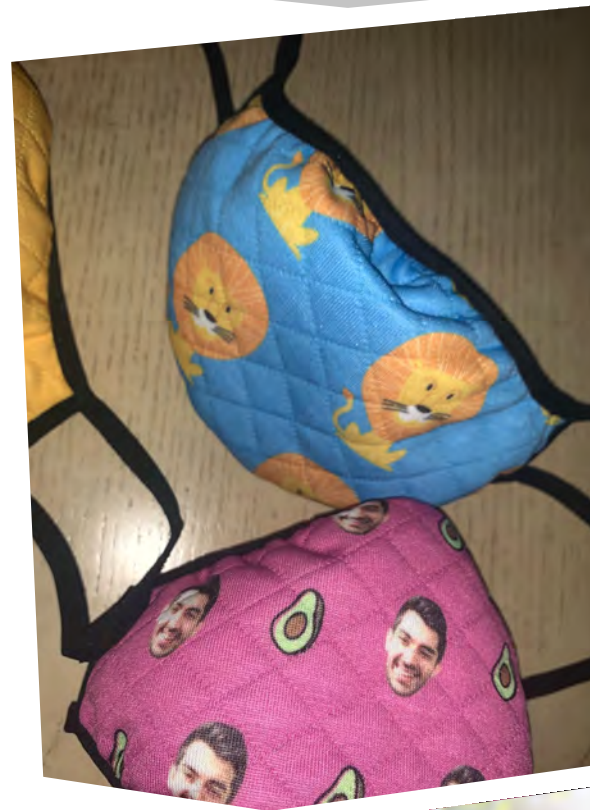
Masks, A Necessary Accessory

At the beginning of 2020, face coverings were common in only a few markets, such as China, Korea, and India. The widespread adoption of face coverings throughout Western countries has become yet another “unprecedented” change brought on by the virus.

Today, the mask has become a staple accessory. Along with our keys, wallet, and phone, it’s something we can’t leave home without. In North America and Europe, it has quickly transformed into a fashion accessory. Single-use masks have given way to cloth masks for both design and environmental reasons.



51% of our bees report feeling more confident without makeup while outside the home



Masks and makeup, of course, are far from a match made in heaven. It's not just that masks reduce the need for makeup but they can smear and remove it. This represents a key opportunity for brands to innovate. Consumers are in real need of practical solutions when it comes to the co-existence of makeup and face coverings. Think on-the-go skincare misters, unshifting foundations, and other innovations in primers and base technology.

Brands also have an opportunity here to expand into skincare for children. Some students are experiencing an increase in skin irritation from wearing masks throughout the school day. As the weather cools and the air turns drier, some of these conditions will worsen. Expect parents to seek more products specifically designed to protect young and sensitive skin.

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I feel more confident because my mask covers most of my face! I'm also less concerned generally about my appearance - there are more important things to worry about these days!

Female, 35, UK



More time for maintenance

Along with masks and the increase in self-confidence derived from wearing them, people have extra time at home to research skincare solutions, experiment with new products, and engage in more thorough and thoughtful routines.

People are also generally more aware of how their skin feels. Globally, the number of consumers reporting “clean and fresh” skin is under-indexing, while the number reporting “dirty, tired and dull” skin is over-indexing.

This tracks the overall rise in hygiene awareness, triggered largely by the focus on contamination brought on by living through a pandemic. Many consumers worry more about germs now than at any prior point in their lives. This urgent need to feel clean will inevitably translate into other realms of hygiene.

Just under 50% of consumers seek out skincare products specifically designed for sensitive skin. 43% want antibacterial properties. Many consumers are also complaining of so-called “maskne” - facial breakouts caused by wearing masks.

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Long time at home, more time for maintenance.

Male, 35, US



50%

of consumers look for products designed specifically for sensitive skin

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With the development of the times and the updating of science and technology, more and more people are aware of the sensitive skin of modern women. People who purchase cosmetics are also very cautious, because if you are not suitable for that type of cosmetic, skin deterioration can happen, so you need to be cautious with the choice of cosmetics.

Female, 23, China

Capitalizing on the New Normal

How can brands capitalize on this rise in self-confidence and bare faces? How can they embrace and enhance this trend without damaging their portfolios?

Precisely because people have socialized so much less in recent months, they now want to make the most out of every meeting - whether it be that Tinder date they have been putting off, or that birthday party that got postponed. For many, just going out to dinner has become a big deal. Brands must find ways to help people feel confident and comfortable with themselves following so much time in isolation — to help them, when they finally do go out, go all out.

Communication is key, now more than ever. Brands need to signal that they recognize consumers' newfound confidence in their natural selves. They should also seek opportunities to extend their categories, with beauty branching into skincare and vice versa. The line between the categories, already blurring before Covid-19, is becoming almost immaterial as consumers simplify and consolidate their routines.



Between April and July 2020, 48% of consumers were leaving the house less than once a day

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I started a new skincare routine in lockdown to try cure my dry skin, so I was moisturising at least twice a day and exfoliating and least twice a week. I feel more committed and engaged because as I'm not wearing makeup I think it's necessary and important to take more care of the skin.

Male, 28, Brazil

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I want to look and feel my best without makeup so I started using the best skincare regimen I could find. I use a number of different products from cleansers to moisturizers and even serums. I love the results and it's getting me even more invested in my skincare

Female, 32, US

Most importantly, brands should be wary of building Covid-19 strategies focused on short-term gains. Most of the changes described here show every sign of outlasting the virus. As many countries enter so-called second waves, social distancing measures are likely to linger into 2021 at least. This is more than enough time for our current behaviors to settle into long-term habits.

Streetbees' Always ON platform unearths new opportunities through a holistic understanding of consumers' real-life experiences, in their own words. By gaining a 360° understanding of the occasions in your category, Streetbees' machine learning technology reveals the key contextual and needs-based drivers of consumer decision making.

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I used to not wash my face every night. Heck sometimes I would even sleep all night with my makeup on. Now I am so invested in my skin care regimen that I wash with a cleanser and polishing gel in the am and apply moisturizer. Then in the evening I will wash my face wear a sheet mask and use my nightly serum. I do this every single day.

Female, 32, US

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At the beginning, my skin was not very good. I didn't pay attention to care, stayed up late, and my diet caused my skin to be very unhealthy. I didn't have the confidence to go out. Over the past few months, I've used my spare time to strengthen my routine and take more care to make my skin better.

Male, 40, China

Get in touch to learn more!

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Streetbees helps the world's leading brands grow by building an Always ON connection with consumers.

**OBSERVE THE MOMENT
OF TRUTH**

Real life behaviour captured at the moment a consumer makes a decision. Never rely on claims.

**GET CLOSE TO
CONSUMERS AT SCALE**

Access rich data with photos and videos from millions of demographically representative consumers.

**AI DRIVEN
GROWTH**

Streetbees identifies hidden growth opportunities by applying AI to millions of real life observations from real consumers.

3.5 Million

BEEES

2.5 Billion

DATA POINTS

189+

COUNTRIES



MARKET LEADING BRANDS USE STREETBEEES TO UNLOCK GROWTH



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