

# Emerging COVID-19 Consumer Tribes

Learn how brands can identify variables driving new tribes and adapt strategies accordingly.

**Human Impact Tracker**

---



# Diverging Behaviors

Since the pandemic began, Streetbees has been tracking the impact of COVID-19 on consumers' lives – emotionally, physically, economically, and behaviorally. Using our chat-style app, over 100,000 of our bees across dozens of countries have already shared moments of their life with us – from when and what they're eating, to how they're feeling, to the products they use for self-care.

We're seeing that people's reaction to COVID-19 is quite polarising. Within a similar demographic group, there are some people who think COVID-19 has been massively blown out of proportion while others consider it to be a grave situation. Looking at behavioral responses, we're seeing a group who wants to adapt to a healthier lifestyle and are looking for healthy changes – while others are snacking more and gravitating towards sweet snacks in order to boost their mood.

“

**I lost my job and was put on furlough. I'm now having to use my savings to survive. This pandemic has been life changing for me and I don't know when things will improve.**

**Male, 33, US**

“

**I saved so much money working from home - on commute, lack of socialising, eating in more and I've decided to buy the pet dog I always wanted to give me company.**

**Female, 43, UK**

“

**The younger generation is very careless and doesn't care about elders. They don't understand they put us at risk by continuing to socialise - it's selfish behaviour causing the lockdown to extend.**

**Male, 52, India**

LEARN MORE



Streetbees' proprietary machine learning technology has identified five key dimensions which underpin people's reaction to the crisis. How vulnerable someone feels (1) physically, (2) economically, (3) socially, (4) emotionally and (5) politically determines their reaction to the pandemic.

Based on these dimensions, we can see **four tribes emerging** out of COVID-19 pandemic. The tribes vary drastically with one another in terms of their fear of the virus, their concerns over financial impact, how they are feeling emotionally, and how they are adjusting their consumption and purchase behaviors.



#### FACTORS DRIVING REACTIONS TO COVID-19

1



Physically

2



Economically

3



Socially

4



Emotionally

5



Politically



# Introducing the COVID-19 Consumer Tribes

These four tribes show the varying emotional state of consumers around the world and how this impacts their interactions with different categories, products and brands. As marketers, we need to recognise these differences – and similarities – and use them to fuel our short-mid term strategies in order to remain relevant to our consumers.



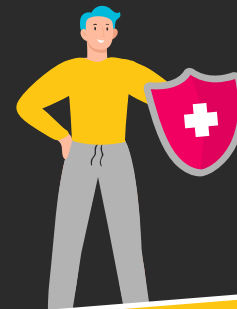
**Opportunists**

- ✓ Very low fear of the virus
- ✓ Not concerned by financial impact
- ✓ Understanding of situation
- ✓ Use as opportunity to further self



**Survivalists**

- ✓ High financial impact
- ✓ Financial concern outweighs fear of virus
- ✓ Survival mode for pandemic
- ✓ Only spending on necessities



**Shielders**

- ✓ Highest fear of germs and virus
- ✓ Leaving the house the least
- ✓ Shopping more online
- ✓ Spending more on personal hygiene



**Jugglers**

- ✓ Combined financial and virus fears
- ✓ Aware virus has impact on financial situation
- ✓ Aware if finances are impacted they can't prioritize their health

# The Opportunists

The first tribe are the **Opportunists**, who are quite sceptical of the severity of the pandemic. Nonetheless, they are trying to make the best out of the crisis by making the right type of life choices. Their key characteristics are that they have both low financial and viral fear levels.

When we look at The Opportunists we see this tribe splits into two. The first part of this group are what we call the **Corrector Opportunities** – these are people who are actually using different consumption patterns to overcome the physical limitations that have occurred because of COVID-19. Instead of making huge changes to their lives, they're making small incremental changes to make their lifestyle a little bit healthier. They're cooking at home more and they're trying to control how much they're snacking.

LEARN MORE



**Leading emotional state:**  
Content/upbeat

## Key characteristics:

- ✓ Low financial and virus fear levels
- ✓ Minimal to no impact on personal finances, spending or consumption patterns
- ✓ Using the situation as an opportunity to make improvements to daily life

“

I think it's being hyped. People are overreacting. Keep clean and wash your hands. Stay home if you're sick. We should be doing this every single day anyway!

Female, 29, US

At the beginning of the pandemic they were actually snacking more and not necessarily eating healthy, but as time went by they started to take action. The Corrector Opportunists decided that they wanted to control their weight and their eating habits due to uncertainty over how long this is going to take place.

The other subgroup is the **Enhancer Opportunists** who recognize COVID-19 as an opportunity to detox. Instead of making small changes they're making large, holistic changes that enable a healthier lifestyle – incorporating more fruits and vegetables into their diet and they snack less to boost their immunity. They've started to drink a lot more natural tea and juices while reducing their consumption of carbonated soft drinks.

Finally, because this is a holistic movement when we look at their beauty and skincare habits, we see that they're actually using less makeup as a way for them to detox. It's been an opportunity to cleanse and refresh their skin and get rid of the chemicals that they've been using for years.



# The Survivalists

The second tribe is the **Survivalists** and these are the ones seriously struggling with their finances. Overall, they're feeling sad and anxious as they've experienced a massive economic impact, and have a higher financial concern rather than the fear of the virus. 75% of this tribe have reduced their spending on shopping and adapted consumption patterns accordingly. This is strikingly different to the overall 30%.

The Survivalists tend to be from more developing markets like Brazil, Mexico and India where we see a higher gap between lower income and higher income households. The first sub-group we've identified are the **Strip Back Survivalists**. These people skew significantly younger and that's partly because they cannot afford to get sick. In order to avoid falling ill, they're incorporating more fruit and vegetables into their diets to stay healthy. They're also cutting down spending and prioritizing the absolute essentials – meaning less budget for snacks. When this group does snack, they lean towards indulgent, sweet products that give them a much needed emotional boost.



Survivalists

**Leading emotional state:**  
Sad/anxious

## Key characteristics:

- ✓ Massive economic impact, with higher financial concern than fear of the virus
- ✓ Have reduced spends on shopping and adapted consumption patterns
- ✓ Just trying to get through the crisis

“

I hate how it has changed everything. I had savings and had planned to do something nice for my family but now I've had to use it for rent.

Female, 32, South Africa



The next sub-group is the **Feel Better Survivalists**. These are the people that recognize that they cannot continue living the way they are for much longer. Although they are budgeting, they're giving themselves a bit more flexibility and taking actions to boost their mood and feel more positive.

Because they're spending less, they're doing less, which is leading to boredom snacking involving crisps/chips and other savory snacks. They're also drinking more non-alcoholic drinks, with particular focus on one they never used to drink much before COVID-19.



“

If I don't go outside to work, I can't make money. I don't have the luxury or safety to work from home. I need to provide for my family so I will continue to work and hope I don't get sick and catch COVID.

Male, 34, Spain





# The Shielders

The third tribe is the **Shielders**, who are obsessed with trying to stay away from the virus and feeling very anxious. They're incredibly fearful of falling ill and financial concerns are second priority for them. This high concern means spending on personal hygiene products has skyrocketed. As they're trying to protect themselves from the outside world, they have the highest adoption of online shopping. 40% of Shielders have preferred to switch over to online shopping versus the 16% of the overall population.

Within this tribe we have what we call the **Surrendered Shielders** – tend to be slightly older and they accept the inevitability of the virus. They feel weakened and defeated by COVID-19, more susceptible to catching it, and the more they stay at home, the more they seek solace and comfort in food. This group is overwhelmingly bored being stuck inside, and they're turning to savory snacks as a form of consoling themselves. As a byproduct, they're drinking more carbonated soft drinks and alcohol as a form of escape.



**Leading emotional state:**  
Anxious

## Key characteristics:

- ✓ Higher fear levels of the virus itself rather than financial concerns
- ✓ Spending on personal hygiene products skyrocketed
- ✓ Highest switch to online shopping (40% in this group vs. 16% overall)

“

I feel we need to take lots of precautions like wearing masks, not touching our faces, social distancing and constantly washing our hands.

Female, 41, India

In terms of beauty and personal care, beauty has taken a backseat. Instead, the focus is about frantic cleansing and showering to protect themselves from contracting the virus.

The second sub-group here are the **Sensible Shielders** – they are also trying to shield themselves from the virus, but are a little bit more balanced in how they approach this. They believe a healthy mind and body can ward off the virus. They're trying to balance their intake of comfort food and unhealthy food, but they're also turning to more indulgent sweet snacks that can provide them with a little bit of a mood uplift. This group is also turning to alcohol, not as a form of escape, but to relax after these long and very redundant days.

Although they are not paying as much attention to their usual skincare habits, they're incorporating more plant based and DIY products to improve their overall routine. They may not be using products as frequently, but when they do, they're likely to use all of them.

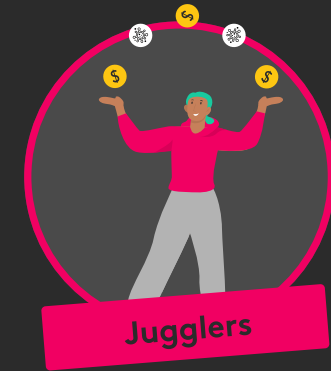


# The Jugglers

Last but not least, we come to the **Jugglers**. They're split between feeling anxious or neutral, and find the fear of the virus and concern for the financial impact are intertwined with one another. This is the tribe that's had the least impact on their spending patterns. They are more likely to be skewed towards lower income and have a multi-person household.

The first sub-group here are what we call the **Anxious Jugglers** – they are experiencing an overwhelming feeling of anxiety. Everything they do is to alleviate this extreme anxiety. In terms of eating patterns, their schedule hasn't changed, but they're trying to incorporate more healthy eating patterns to make them feel better and less anxious about losing their immunity. If they snack, they choose sweeter products because it boosts their mood.

Their personal care routines are focused on cleaning solutions - prioritizing their need for hygiene.



**Leading emotional state:**  
Anxious/neutral

## Key characteristics:

- ✓ Fear of the virus and concern over financial impact, both intertwined
- ✓ Least impact on consumption and spending patterns
- ✓ More likely to have lower incomes
- ✓ Likely to live with extended family and/or parents

“

Coronavirus has changed all aspects - habits, economics. Activities must be postponed/cancelled, mentally tired every day, worrying and afraid of contracting Covid.

Male, 45, India



The **Calm Jugglers**, on the other hand, are the biggest sub-group across all of our tribes. These consumers are eating healthier, but their schedules have changed. Meal times and snack times have blurred so they're eating smaller meals and snacking more often. Snacking is used as a way to get rid of boredom and is coupled with a lot more carbonated soft drinks.

Their beauty routine has become simplified, but when it is done – similar to the previous groups – it's done as a complete routine.



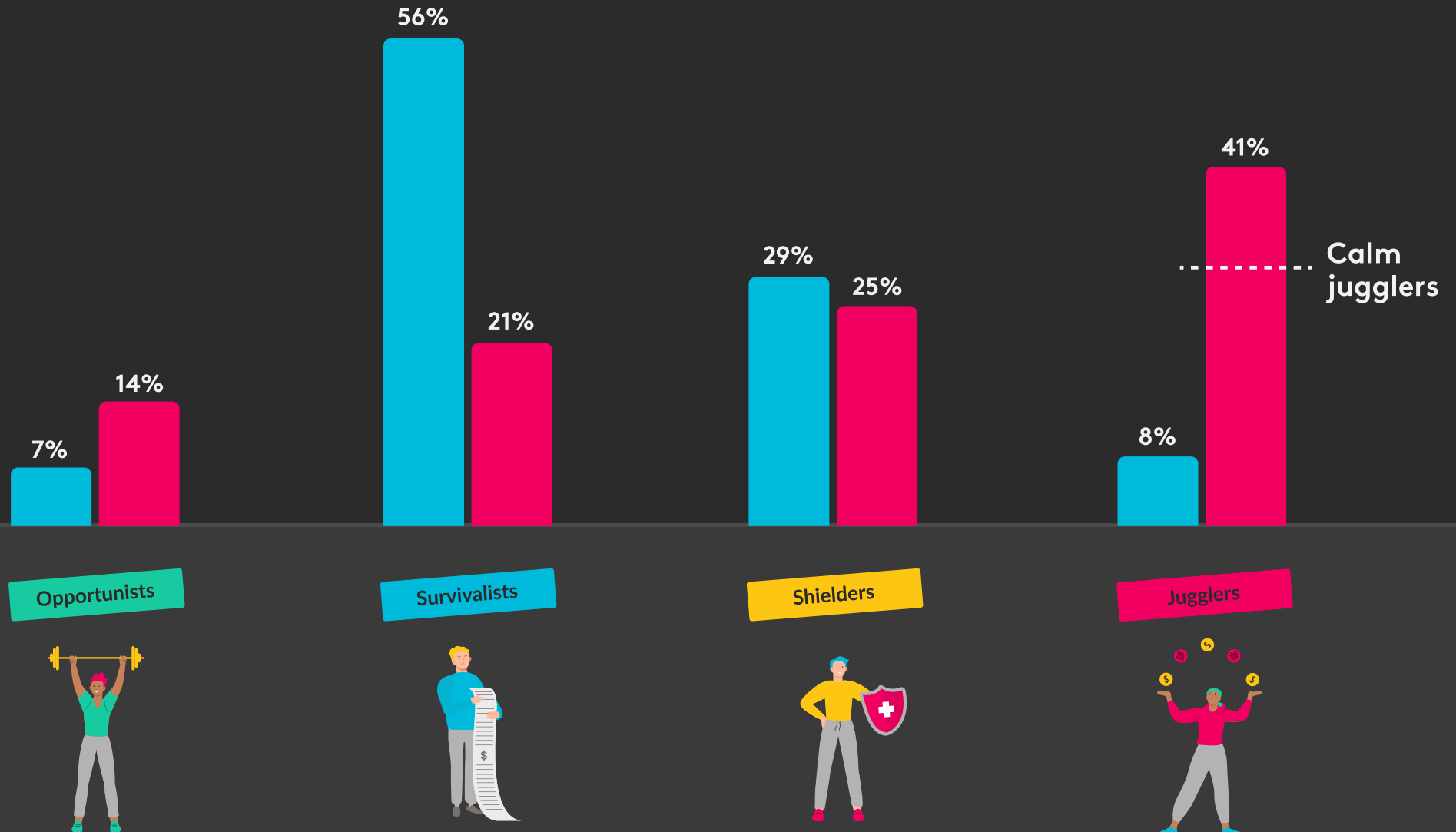
“

I used to use face cleanser, exfoliator, moisturiser and also a spot cover-up as part of my skincare routine. In lockdown I couldn't replenish my stock so I got used to just cleansing and moisturising and I much prefer it!

Female, 24, UK

## EVOLUTION OF TRIBES: BEGINNING TO NOW

● Mar - Apr 2020    ● Aug - Sep 2020



# Moving forward

The different tribes require a nuanced approach in terms of communications, product and channel strategy. The specifics of this will vary by category but we have uncovered some common themes that are applicable across industries. Here you can see the different angles brands can take when targeting each of the tribes and sub-tribes:





# Learning to adapt

Now, the big question: how stable are these reactions?

At the beginning of the pandemic, many people's coping strategies involved denial. They then moved into shock as it felt like the world was shutting down – lockdown hit, businesses shut their doors and the severity of the situation became very clear.

However, as time went on, and the pandemic evolved further, we have been experiencing more life moments in this uncertain world. The proportion of people adapting and juggling their emotional and behavioral responses with this new reality will eventually grow.

As consumers become more accustomed to the pandemic and adapt, how are these tribes likely to evolve in the coming months? Looking at the emotional and behavioral shifts over the past eight to ten months, we can see likely patterns.

## What Streetbees Provides

- 1 Real, in-the-moment behaviour capturing full context and emotions
- 2 Consumers own words, analysed with advanced NLP to eliminate bias
- 3 Agility and proactiveness, uncovering opportunities to drive growth

If you're interested in learning more about how to build a strategy for your brand and the categories you operate in:

**BOOK A DEMO**





**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.

**3.4 Million**

BEES

**2.2 Billion**

DATA POINTS

**189+**

COUNTRIES

MARKET LEADING BRANDS USE STREETBEES TO UNLOCK GROWTH



L'ORÉAL®



MARS

BBC

GET IN TOUCH



/streetbees



/streetbees



hello@streetbees.com

**Streetbees' Solutions**



**BrandX**



**HIT**

Human Impact Tracker



**LAP**

Life At Play



**DGE**

Dynamic Growth Engine