



COVID-19

Human Impact Tracker





“

Since the outbreak of the coronavirus, my family only leaves the house once a week. We dare not go to a crowded market!

...

We're having to buy water, rice, food, toilet paper all online. We don't eat vegetables anymore because they're too expensive and you cannot trust buying fresh food online.

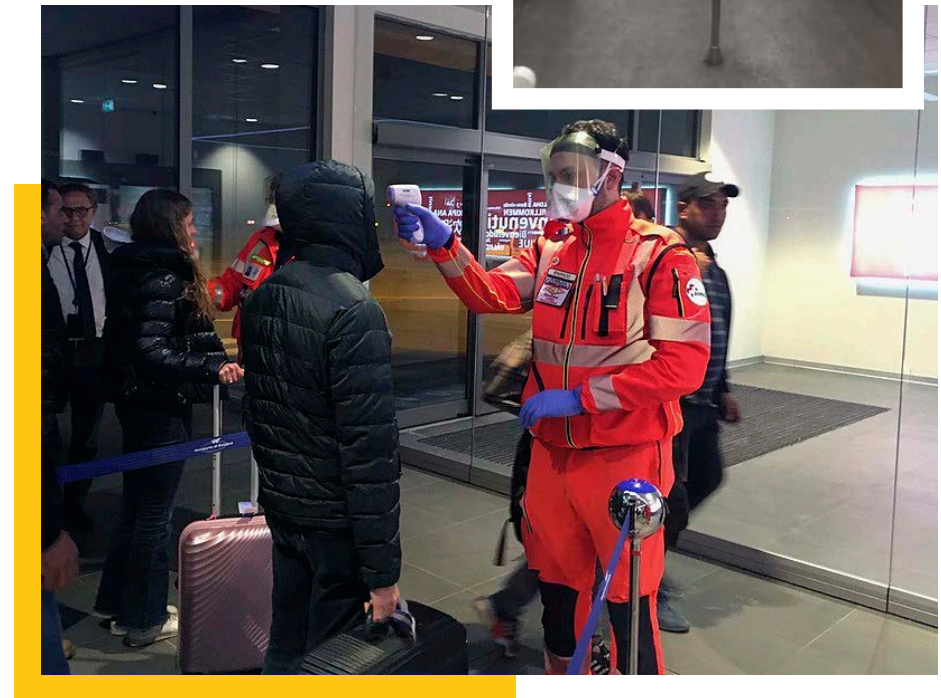
...

I'm very grateful that my company is allowing us to work from home. Our kids are not going to school anymore, so I have to stay home with them.

Female, 37, China

Diana, 37 years old from Guangzhou in Mainland China, describes the true consequences of the crisis as it unfolds - her entire family avoids leaving the house, she began ordering supplies online and was forced to work from home due to the schools being closed.

Diana is not alone in completely shifting her living and working habits - with the fear of contracting COVID-19. We are all experiencing challenging times with dire human consequences and consumers are already taking drastic measures to adjust their lifestyles. To help companies stay close to their consumers during this turbulent time - and address their shifting needs - **Streetbees has launched the COVID-19 Human Impact Tracker.**



To learn more about the COVID-19
Human Impact Tracker visit:
www.streetbees.com/HIT

The spread of COVID-19 - or Coronavirus - has shocked the world and is now over 10x the size of the SARS outbreak in 2003. Originating in the Hubei province of China, it's a virus that causes respiratory infections that range from the common cold to pneumonia.

At the time of writing this report, there were more than 110k confirmed cases of the illness - 73% of which are within mainland China - and the potential global consequences of the virus are unmatched by anything we've seen in recent history. Just in economic terms, it was reported that \$6tn was lost from global stock markets in less than a week by the end of February 2020. As the outbreak develops, companies are left in the dark over what the future holds - how they can best support consumers anywhere in the world. In challenging times like this, getting closer to consumers becomes more important than ever. That's why Streetbees has launched CGIT to help companies navigate the fast-shifting consumer landscape, and respond swiftly to emerging needs - tracking all affected markets and uncovering what's really happening in everyday lives.

Our global users are sharing the moments of their lives on a continual basis, showing and telling us how COVID-19 is affecting them. Streetbees, built to give people around the world a voice, will continue to show the human side to the outbreak by listening to their deepest concerns.



To stay attuned to how people are responding to this outbreak, and be informed about how it will influence your business, subscribe to our weekly COVID-19 HIT updates

www.streetbees.com/HIT

MAINLAND CHINA:
80,735 cases, 3,120 deaths

ITALY:
7,375 cases, 366 deaths

US:
564 cases, 22 deaths

SOUTH KOREA:
7,478 cases, 53 deaths

IRAN:
7,161 cases, 237 deaths

UK:
280 cases, 3 deaths

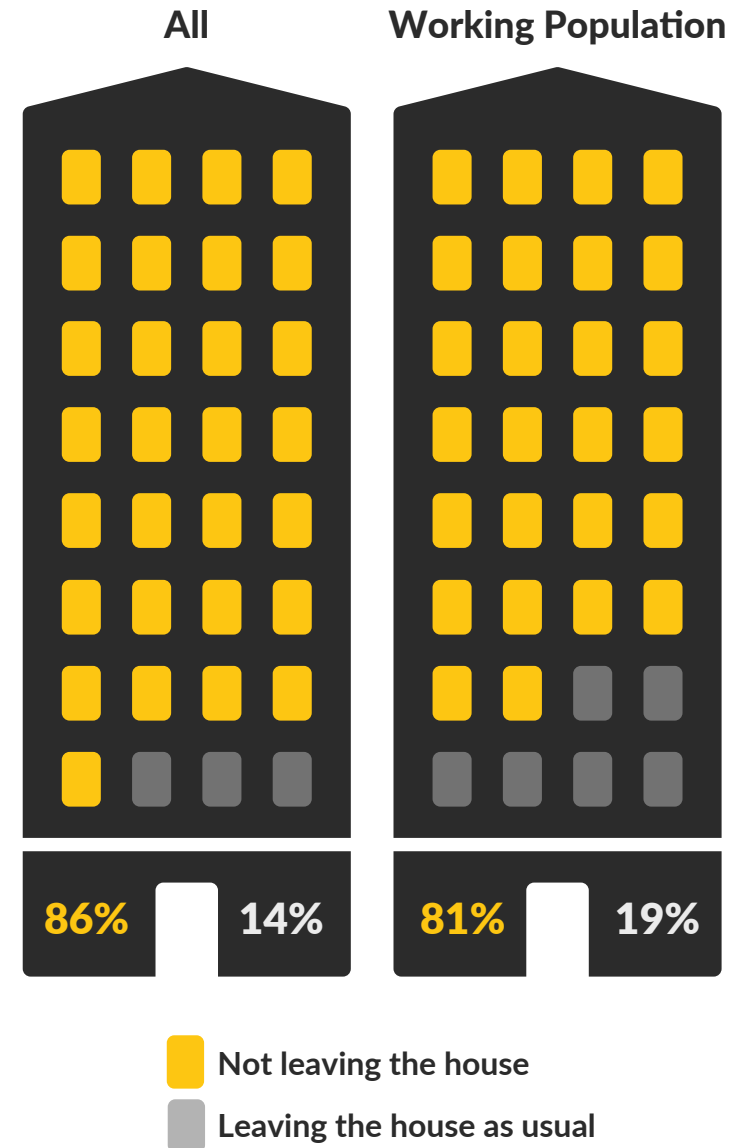
A true economic emergency?

In just a few short months, life in China has been turned on its head. It is where the virus originated making it of course the hardest hit, with every aspect of life affected. As more and more countries suffer from the outbreak, everyone's looking to China to know how to prepare for what's to come.

So, what's happening right now in China?

The majority of the public are currently housebound, with only 14% leaving their home as usual. This means people are having to adapt their working habits in order to retain their income, resulting in 81% of the working population working from home, with 4 in 5 agreeing that their work is being disrupted due to the COVID-19 epidemic.

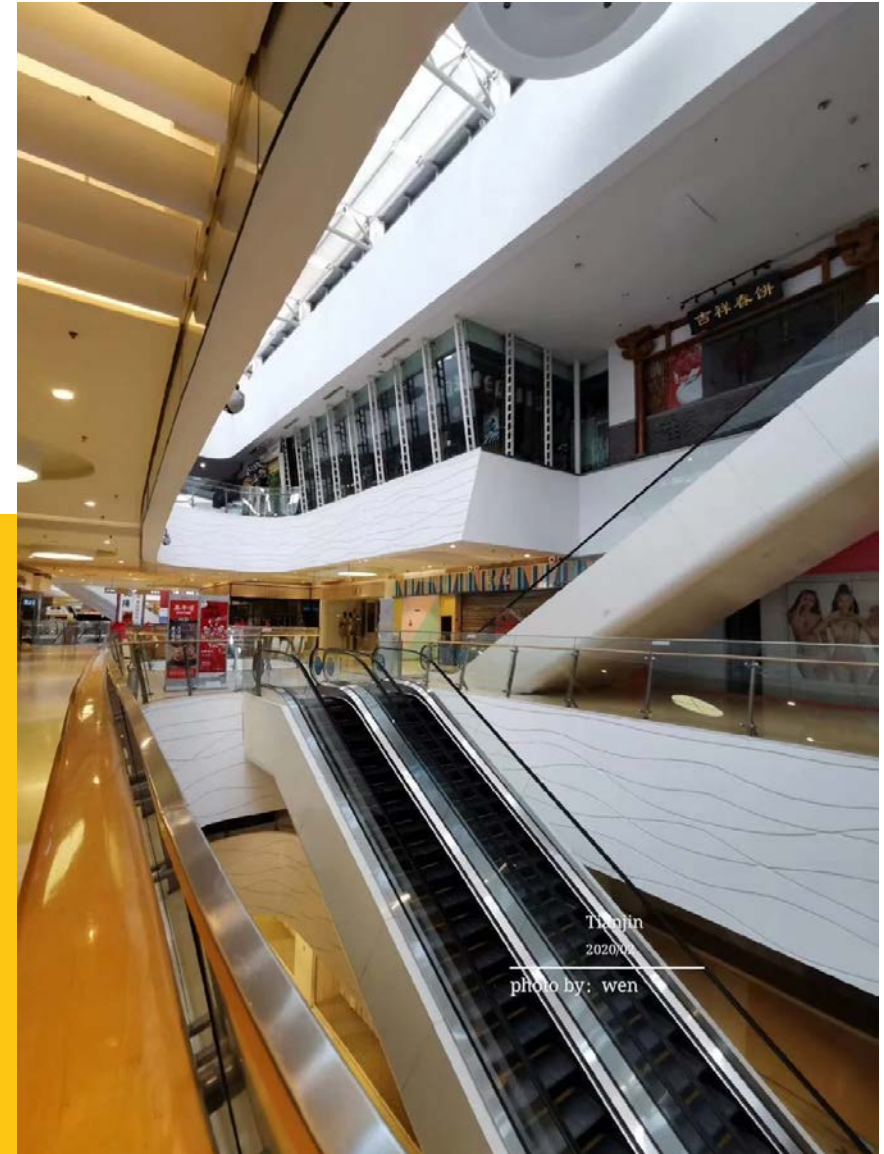
% OF CHINESE CITIZENS STAYING AT HOME



“

I work in the inspection of import and export commodities. The epidemic has spread seriously and a large number of factories failed to deliver products on time which led to fewer cases opened for inspection. This had a great impact on business. My company has also taken this as an excuse to deduct employees' wages and bonuses. My income has dropped significantly. Everything is more expensive now and I'm making less money.

Male, 46, China





Starbucks, Uniqlo, Nike and Apple all temporarily closed stores in January/February 2020, while other companies such as **Google, Unilever, Sony** have asked employees in major hubs to stay in and work from home.

For those who do venture outside, areas associated with large groups of people - public transport, parks, busy shopping centres - are expressly avoided. The international travel industry is particularly nervous as consumers across the globe limit all travel - **1 in 2 have already cancelled or changed their travel plans** and with each passing day there are more cancellations.

“

Coronavirus has completely changed my daily life. Many shops, malls, and restaurants have not opened the door for weeks now, and it has become inconvenient to buy things. You are not allowed to enter public places without wearing masks. I'm now staying in most days for the whole day and it's getting really boring. Out-of-town parties are not allowed anymore.

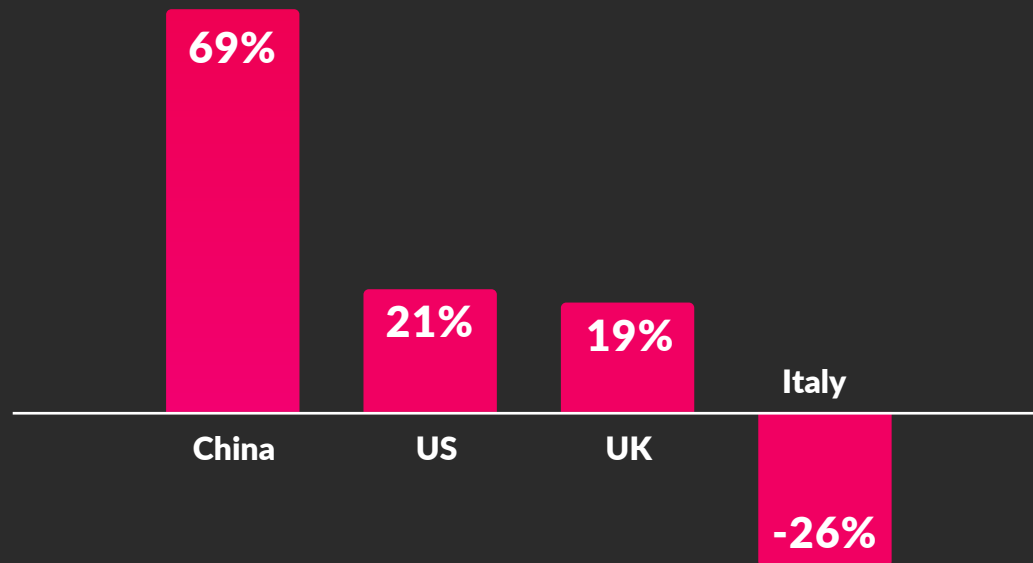
Male, 24, China

1 in 2

globally have already cancelled or changed their travel plans.

How far and for how long?

We know that lifestyle in China is changing - but to what extent are consumers willing to adapt and is there anything they are unwilling to give up? Is there a limit to how long they'll stay in the home, or will the desire for fresh air and socialising take hold? The answer lies in how deep rooted their fear of COVID-19 is.



FEAR INDEX
% who are afraid - who are not
March 2-8, 2020

“

Coronavirus makes our hearts tremble, and makes all humans fear! And now we cannot even go out and buy something. Our freedom is gone. We may have to live life in our cells without seeing friends or family for months or years. In addition to bringing trouble to our lives, some people will also lose their lives!

Male, 43, China

“

In all honesty, it didn't upset my life at all, these things happen and there is nothing you can do about it. If you get sick, you get sick - I'm not going to stop seeing my friends. Maybe the only thing that has changed is hygiene. I have become more fussy, but nothing more.

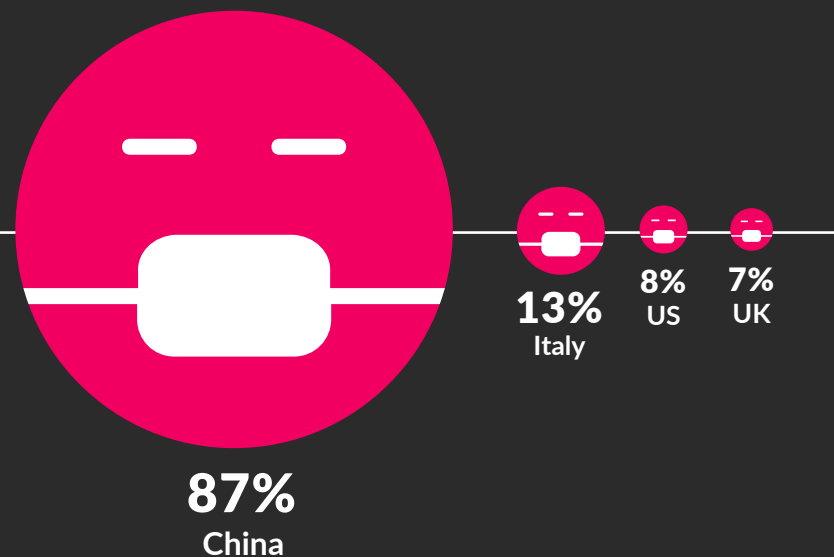
Female, 20, Italy

Despite Italy having the fourth largest number of confirmed cases in the world, as of the beginning of March, Italians weren't as worried as those in the UK, US or China.

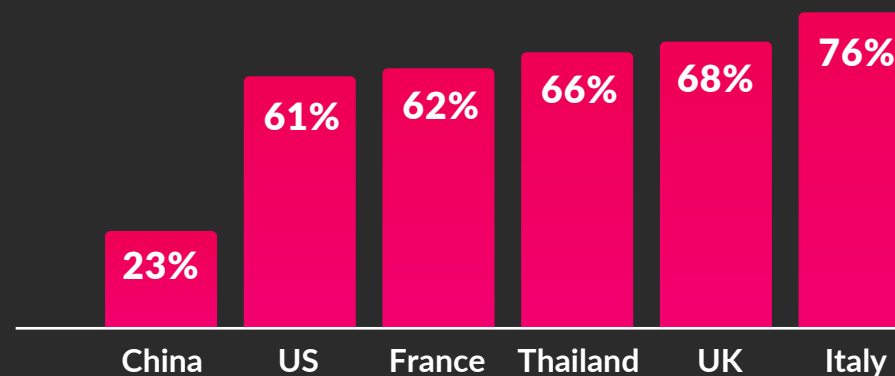
Contrary to the Chinese population, most people in Europe and the US do not expect to be personally affected by Coronavirus, which can be correlated to their distrust in the media.

Distrust levels are higher among Millennials and Gen Z in Italy, with 80% believing that health scares are over-exaggerated, compared to 56% of Baby Boomers.

THOSE WHO EXPECT TO BE PERSONALLY AFFECTED BY COVID-19



% WHO THINKS THE MEDIA OVEREXAGGERATES HEALTH SCARES



To access weekly tracking of fear levels, and be informed about how it will influence your business, subscribe to our weekly COVID-19 HIT Updates here:

www.streetbees.com/HIT

Spreading misinformation

As time goes on and the situation becomes more severe, consumers across the globe are seeking more information from authorities, friends, family and media sources. Globally, 2 in every 5 say that they think about contracting germs regularly and look for information to learn how to avoid coronavirus.

The level of fear amongst the public is also leading to spread of misinformation, extreme scepticism, protectionism and unnecessary stockpiling. In the coming days, our fears and the measures we take to avoid the virus are likely to have as big an impact on the future of the world economy as the epidemic itself.

“

I completely stopped flying and many countries banned flights from China and Italy. That's because flying increases the risk of contracting the virus. Even if there is no one on your flight who is sick, if the plane has been to China it may still carry the virus and you can get infected.

Female, 33, UK

“

We have different soaps for every person in the home. Everyone uses their own soaps so that germs can't spread with soaps.

Female, 21, IN

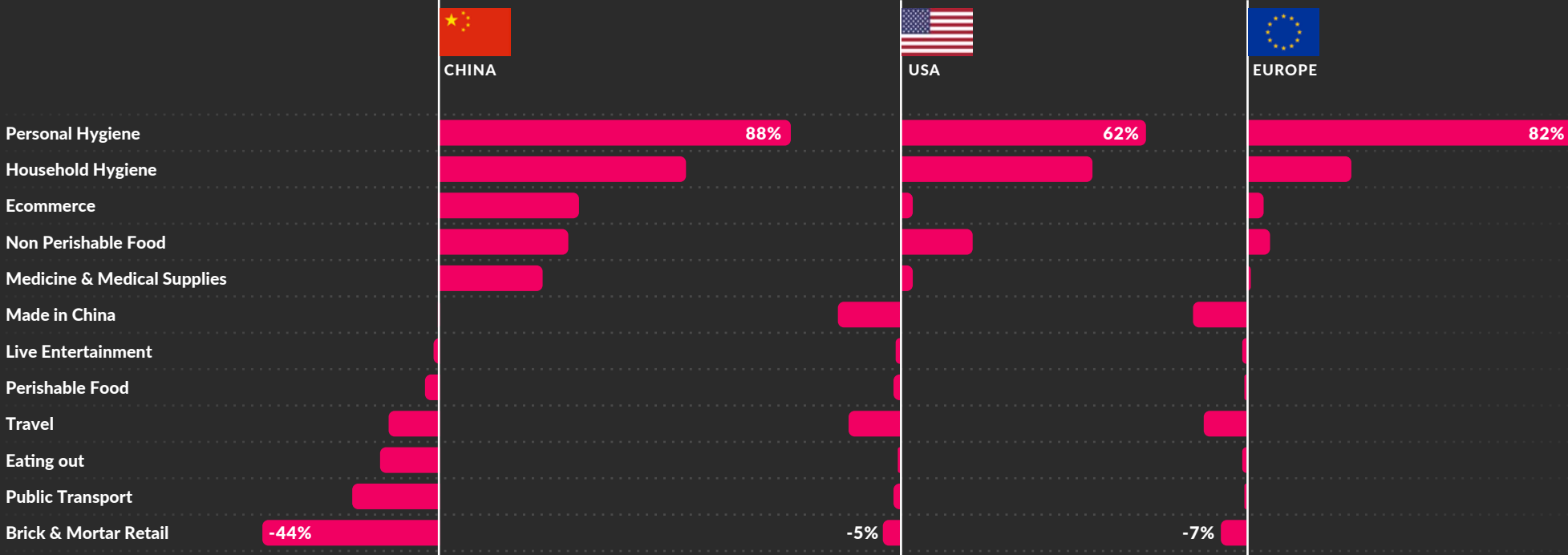
“

Coronavirus is created in China to slow down the global economy. They brought it to the US to mess with our economy. But it won't work - I'm sure we won't see an outbreak in the US. We're a healthy nation.

Male, 21, US

80% of Chinese citizens are changing their consumption and shopping habits to adapt to the COVID-19 outbreak and we are seeing consumers across the globe follow suit as the virus spreads. They are increasingly relying on online shopping and contactless delivery, buying non-perishable food in bulk and stocking up on disinfectants. Here are the categories booming and suffering from the outbreak:

**% CONSUMERS INCREASING/
DECREASING (NET) SPEND
DUE TO COVID-19**





While certain product lines are booming, no sector is safe from the negative market impact of Coronavirus. Over the coming weeks, we will be tracking how consumer spending is shifting on each specific category - uncovering which products consumers are prioritising and which are losing favour amid the panic.



This week we are starting with Personal Care, Food and Beverages where we are observing seismic shifts. If you would like to receive next week's update which will include a focus on Retail & Travel, subscribe here.

www.streetbees.com/HIT

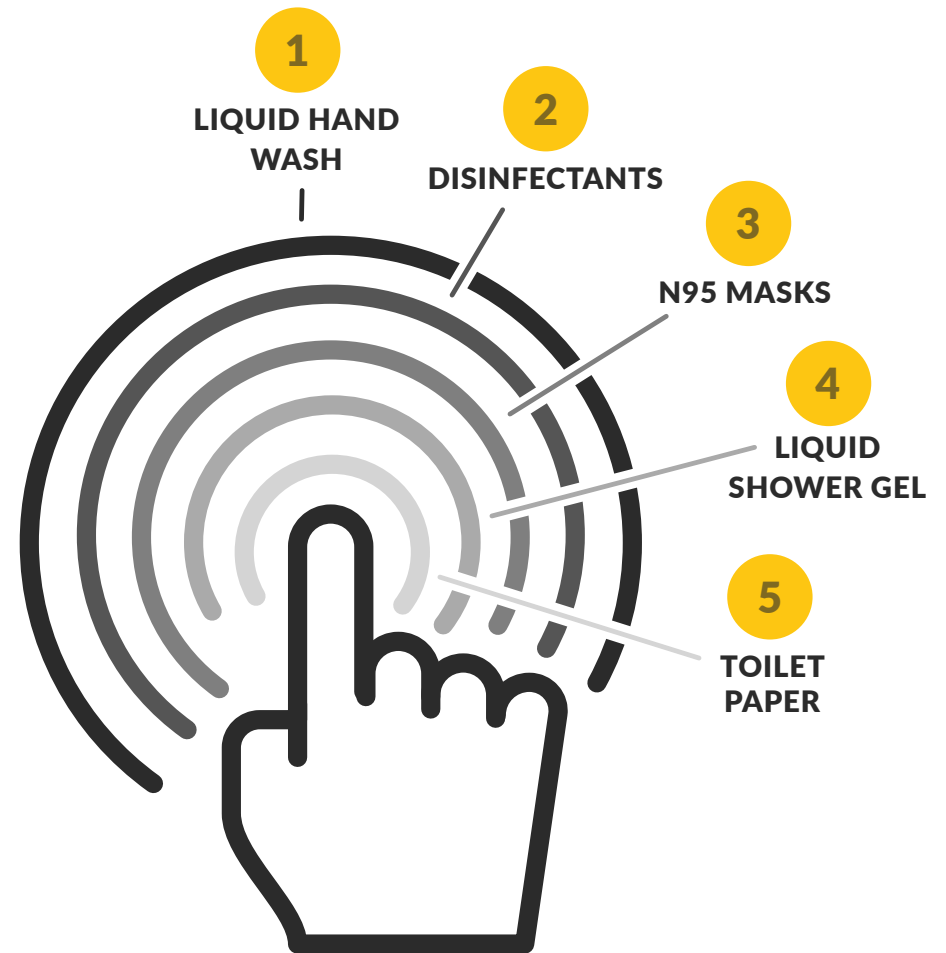
A touchy subject

As expected, personal and household care products witness the highest growth with 4 in 5 of Chinese consumers changing their personal hygiene and household cleaning habits. Currently, only 2 in 5 in the rest of the world are doing so - but as COVID-19 spreads, this is expected to reach the same levels as China.



4 in 5 | **2 in 5**
in China | rest of the world

ARE CHANGING PERSONAL HYGIENE AND
HOUSEHOLD CLEANING HABITS



TOP 5 IN PERSONAL CARE

A wash with panic

More than 60% of Chinese consumers are reporting that they are washing their hands more often. 32% change their clothes as soon as they return home to avoid contact with furniture and in some cases even use a paper towel to touch buttons in an elevator to avoid hand contact. Not only has the frequency of hand-washing of those activities increased, but the ritual has also become substantially more extensive leading to larger quantities of hand-wash products being consumed.

Even in countries where COVID-19 has only just surfaced, we're observing a significant increase in hand-washing following Government advice. Will people maintain these habits once this epidemic settles down or will usage revert back to what it was previously? We will continue to monitor which new habits and attitudes towards hygiene will persist after the outbreak.

“

For me, hand washing was normally just a simple rinse with water. I didn't really feel the need for soap. Now, I use both a liquid soap and a hand sanitizer. I used to do it once or twice a day. Whereas now, I wash my hands every time before eating, after eating, before and after going out. I wash more often and spend much more time washing and rinsing. You cannot afford to shortcut anymore.

Male, 34, China



Now both hand wash liquids and sanitisers are becoming a common feature around the sink in China.

Wipe the slate clean

As governments, researchers and the general public grapple with the understanding of COVID-19 and how it spreads, people are resorting to different precautions to safeguard themselves. A variety of measures are being adopted; from alcohol based hand sanitisers, sprays, gels, and wet wipes, to home-made disinfectants with **white wine vinegar and vodka!**

1 in every 3

globally has increased their use of disinfectants last week.

“

I actually never bought a hand sanitizer before. Now I use it to wash my hands, to clean the desktop, wipe my mobile phone and other things that I touch often.

Female, 37, China

“

I bought multiple bottles of disinfection hand soap with medical alcohol and normal hand sanitizers. I'm also adding a touch of vodka to my toothpaste - apparently it's a better disinfectant than mouthwash.

Male, 40, Italy

“

I use cooking vinegar to disinfect my hands. You can also use white wine vinegar. When the kids come back from school, I'm wiping their hands with vinegar. It doesn't smell great so you need to wash with a scented hand wash afterwards, but it's the best solution to kill the germs. It's better than disinfectants you have in the supermarket and it's cheaper.

Female, 38, UK



Alcohol based disinfectants are gaining in popularity among consumers - specifically those by Dettol and Walch - a core brand of Guangzhou based Whealthfields Group.

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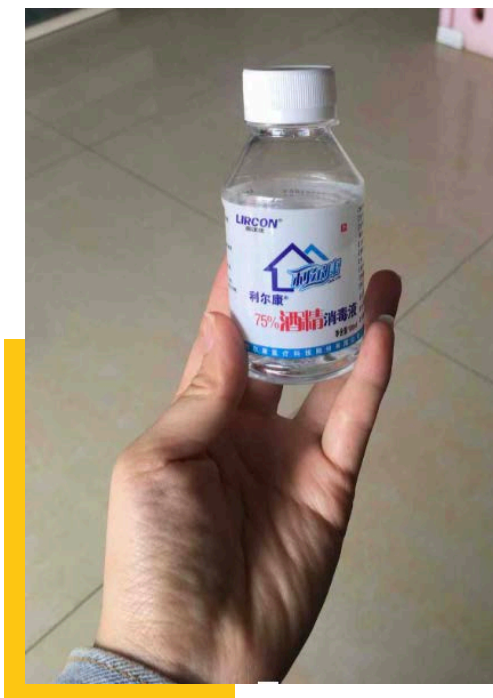
I use disinfection products now on everything. I would even wash food with it if it was safe. We now wash our hands with disinfectants, mop the floor, wipe items like phone and TV. If we are going to survive corona, we have to pay more attention to our hygiene and cleanliness at home.

Female, 42, China

“

It seems scary. You gotta wash your hands when coming from outside, use hand sanitizer as soon as you touch something. The news said you can also get it from coming in contact with anyone who had it. Also from droplets in the air. I am going to avoid people as much as I can.

Male, 26, US



The change is more than skin deep

Consumers are feeling the pressure to increase their purchases of hand wash and disinfectants - but what are they shifting the spend from? In personal care, make-up products and prestige beauty are feeling the squeeze. Staying indoors means appearance is becoming less of an immediate priority. Will this continue in the medium term or are we going to start wearing make-up for video conferences?

“

My workplace is already suggesting people work from home - I'm going to avoid going into the office until this all settles down. I haven't worn makeup all week because I'm not feeling the same pressure to look good - even when video conferencing my colleagues. It's quite freeing actually.

Female, 25, UK

However, there are specific skincare and beauty categories which are expected to outperform such as eye care and make up as eyes become the most prominent and expressive part of the face when using masks.

According to Alibaba, a series of live-streaming sessions on how to create beauty looks while wearing surgical masks attracted 8.2m viewers on Taobao Live in a single day, and led to a 150% increase in month-on-month sales of eyeshadow palettes in the week ending February 17.



To discuss the impact of COVID-19 on your personal or home care business visit:

www.streetbees.com/HIT

Giving us food for thought

With employers implementing work from home policies, and a reluctance to go to cafes and restaurants on the rise, we are already seeing shifts in how and what people are eating and drinking.

FOOD & DRINKS

TOP 5



RICE & NOODLES
CANNED STOCK & SOUP
OILS & SEASONING
PROTEIN BARS
BOTTLED WATER

BOTTOM 5



FRESH FISH
MEAT & POULTRY
FRESH FRUIT & VEG
EGGS
SUSHI

“

Coronavirus has totally changed my shopping list. I'm stocking up canned food just in case we have to stay in for long periods. Before corona, I would have preferred fresh food. Now, I prefer to choose foods that can be stored for a long time, such as canned fish, anhydrous vegetables, rhizomes, and so on. I'm looking for food options that improve immunity. The problem is all of China is in a state of crazy buying and stocking, which has caused the price to increase several times!!!

Female, 25, China

From canteen to scratch cooking

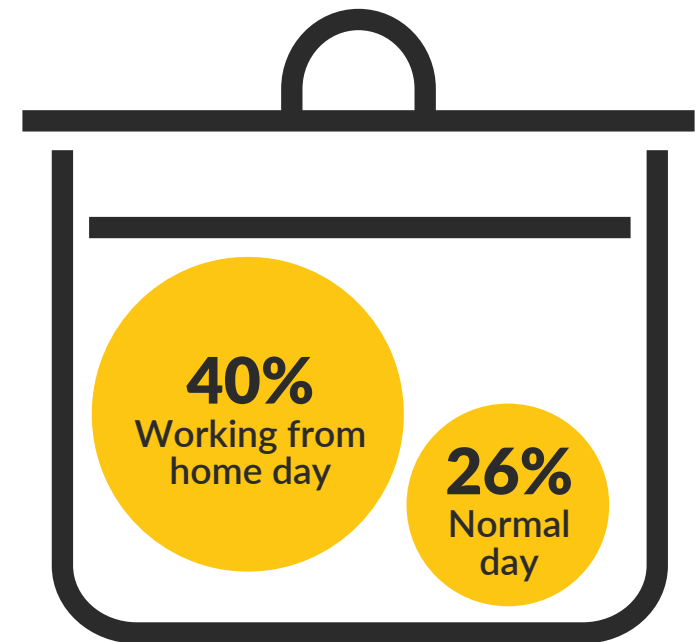
Staying home is affecting both consumption and preparation of food. In the US and Europe, sandwiches, potato crisps, fruit and salads are popular lunchtime choices when at the office. However, contrary to expectation, we are not seeing more cooked from scratch meals at lunch time when working from home. Instead, feeling the pressure and anxiety of being isolated and alone, consumers are turning to more frequent snacking featuring sugar-rich cereals, chocolate, toast, nuts and pretzels.

“

My company asked me to stay home but I find it really hard to focus when I'm not in the office. I end up eating a lot more snacks to keep myself going. I think I actually eat healthier when in the office!

Male, 41, US

Evenings are a completely different story though. With more time on their hands and hesitation around eating out at restaurants, people are returning to home-cooked meals with the family as the main form of entertainment.



% COOKING DINNER FROM SCRATCH

20%

of consumers globally (not only in China) report increasing their rice and noodle consumption as a quick, versatile and long-lasting meal option.

“

I am stocking up on everything but I'm especially buying a lot of easy-storage dumplings, and instant noodles. You can eat them whenever you want, they won't go off.

Female, 33, China



“

Nowadays I basically buy daily necessities for two months at a time! Food will be stocked so that we don't have to worry about running out. You just don't know what's coming next. I am now buying a lot more rice in bigger packs as we eat this a lot.

Female, 29, China



“

I'm having to work from home now so I decided to make home cooked meatballs and vegetables with rice for my family. I spent over an hour on it, as I had the time to spare for once! With no commute, I'm saving 2 hours a day.

Female, 39, UK





Reversing the fresh food trend, canned goods once again are becoming popular as they are long-lasting and easy to store. People are stocking up on a variety of canned foods:

TOP 5 CANNED FOODS



SOUP
STOCK
CORN & GREEN BEANS
TOMATOES
PULSES, BEANS, LENTILS



“

I heard on NPR that it would be a good idea to stock up on canned foods, medicine, and first aid supplies just in case, so I did just that. I bought loads of canned tomato soup and beans. I want to avoid having to go to stores too often.

Female, 22, US

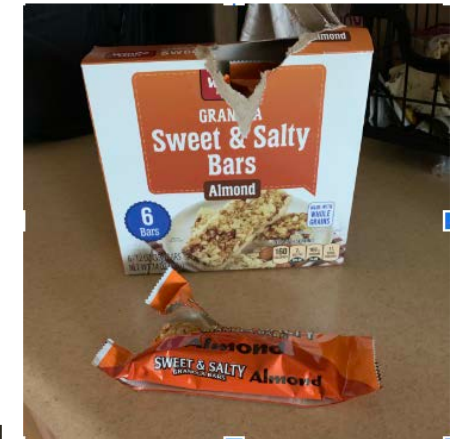
We are yet to see a spike in frozen food consumption, but this may soon change as consumers look for long-lasting and nutritious food, beyond canned products. Companies who specialise in frozen meals can lead the way by reminding consumers of the convenient and nutritious nature of frozen fruit, vegetables and fish.

Oils, cooking sauces and seasoning are also experiencing a boost as from-scratch cooking is taking off. Protein bars are also popular as consumers are keen on products that can provide protein while they are avoiding fresh meat, fish, eggs and dairy due to the fear of germs spreading through fresh food. Long shelf life is an added benefit, and single servings make for a simple snack when staying in alone.

“

I'm staying in today as I'm asked not to travel to the office. For an afternoon snack, I needed something sweet and filling, but also with added protein. This bar is a quick source of protein so it ticks all the boxes

Female, 29, US



Last but not least, we are seeing a temporary reversal of “no plastic” trend with more people returning to bottled water. 3 in every 4 globally has reported that they prefer bottled water at the moment with rising concerns over the hygiene of reusable cups and bottles and of public tap water. Consumers also share a belief that drinking more water can help act as a preventative measure against COVID-19 leading to overall increased water consumption.



“

I have purchased extra bottled water & non-perishable foods. You do not want to run out of water at a time like this.

Female, 49, US

“

I am drinking a lot more mineral water as I read this was good for me. It can make my immune system stronger against corona.

Female, 51, UK

“

I usually drink tap water but at the moment I prefer to minimise contact with anything that may be touched by someone else who is infected. If you grab a glass of tap water in the pub or touch the tap in your gym, you just don't know who else may have touched it before you. It's just safer to have your own bottle of water at the moment.

Female, 38, UK

Fresh is out

Fresh food including fish, seafood, chicken, meat, eggs and vegetables are a staple in our diets. Now fresh items, particularly animal based ones, are declining in popularity due to:



SHORTER SHELF LIFE THAT DOESN'T LEND ITSELF TO BULK BUYING



NEED TO TOUCH AND SEE FRESH FOOD BEFORE BUYING WHICH IS NOT POSSIBLE WITH ONLINE SHOPPING



FEAR THAT ANIMAL PRODUCTS ARE THE CAUSE OF CORONAVIRUS AND EATING THEM CAN BE INFECTIOUS

As a result, we are already seeing a roughly 10% decline in fresh food consumption. We will continue to monitor the change in spend and how consumers are reacting to misinformation about the role of fresh food in spreading the virus.

“

I used to buy fresh vegetables or meat in supermarkets or markets. Now, because of the coronavirus, many places are not open. And I don't trust what I can get online. You just don't know if it's contaminated. I'll just use canned food for a while.

Female, 28, China

The Dilemma of Chinese and Japanese Food

Every 2 in 5 consumers in Western countries are avoiding products made in China. Being the epicentre of the virus is causing a strong association between COVID-19 and anything produced in China - or even just relating to China. Restaurants in London's Chinatown are reporting up to a 50% drop in footfall due to public concerns.

“

We have a completely empty restaurant tonight. You can see inside, there is no one. Our food doesn't even come from China, it's all sourced from the UK but people are avoiding the neighborhood altogether. We may have to shut down if it continues like this.

Male, 48, Restaurant owner in Chinatown, London, UK

“

I am avoiding eating in sushi restaurants, I worry you can catch coronavirus from raw fish.

Male, 20, Italy

“

We just stopped eating Chinese food. Not buying anything that is made in China. It's just not worth the risk.

Female, 33, UK



Learn more about food & beverages
www.streetbees.com/HIT

Contactless delivery

The current outbreak has undeniably sped up the adoption of certain technology solutions such as contactless drone delivery, video-conferencing, instant messaging and online games with spectators.

Many of the supermarkets in China are currently shut - meaning those left open are incredibly crowded with limited stock available. Delivery has quickly become one of the only ways people can get food and other supplies - with companies introducing rapid contactless delivery services to limit the risk of spread. International chains like McDonald's, KFC and Starbucks have already extended this offering outside mainland China.

Meituan-Dianping

Chinese food delivery giant Meituan was one of the first to initiate this service - reporting that between January 26 and February 8, over 80% of orders requested the contactless service - this goes up to 95% when you just look at Wuhan, where the outbreak started.

The increase in demand for home-delivery is forcing all major consumer companies to re-think their direct to consumer channel strategy and revise their packaging choices in favour of lighter options.



What the experts say

Infectious disease specialist Dr Nenad Macesic shares his thoughts on the current pandemic and the impact it's having on healthcare professionals around the world.

“

Countries need to be very proactive about testing early on. What's happened in Washington State in the US is a good example of why - because of rigid testing policies, along with technical issues, a couple of early cases were likely missed which led to local transmission. Over the next few weeks, we'll either see that the US has been able to contain the spread or we'll see more local transmission.

Dr. Nenad Macesic

Infectious Diseases Physician
NHMRC Emerging Leadership Fellow
Alfred Hospital | Monash University

...

There will definitely be a significant number of new cases, it's just a question of whether there will be a very rapid peak like what happened in Wuhan or if it will be spread out over a long period of time. Everything is trying to be checked on a public health level at the moment, trying to decrease the rate of spread because when you have a sudden influx of cases that makes it much more difficult to actually care for those people.

...

It's having a massive impact on healthcare workers in terms of the running of the hospital - it's using up a huge number of resources to allow people to be assessed, to be tested and to place them in isolation so it doesn't spread within the hospital. It's had a massive impact. Just in terms of healthcare workers, once they start to become affected certain workforce requirements start to kick in - if everyone is required to go home when there's a suspected case and self-quarantine for two weeks, a significant proportion of the workforce could be impacted, right when they're needed the most. This makes it even more challenging to address the crisis.

COVID-19 HIT

People around the world are drastically changing the way they live and work in response to COVID-19. Learn how Streetbees is helping companies stay close to their consumers and address their fast changing needs with our Human Impact Tracker.



To track the impact on your category and discuss how it will influence your business, please get in touch with our COVID-19 hotline

HIT@streetbees.com

- Monitor shifts in habits and attitudes across 10 markets
- Track human fears and reactions in their own words
- Access in the moment usage and shopping data with photos and videos
- Observe the impact of 'staying in' from consumers' eyes
- Weekly updates with comparable benchmarks from China, Italy, UK, US and other affected markets

Coverage: China, US, UK, Italy, France, Germany, Spain, India, Japan and South Korea

Sampling: A demographically representative sample of 6,500 consumers



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

150

COUNTRIES

MARKET LEADING BRANDS USE STREETBEEES TO UNLOCK GROWTH



L'ORÉAL®



MARS

BBC

GET IN TOUCH

