

WHAT IS THE FUTURE OF HYGIENE?

2 0 2 0

A Linkfluence Social
Intelligence Report

Changing perceptions and behaviors after COVID-19

What's the purpose of this report?

The goal of this report is to answer important questions asked by our clients and partners about the sudden and lasting changes to consumer hygiene after the COVID-19 pandemic, and secondly, to demonstrate the depth, relevancy, and value of social media intelligence to leaders in marketing and consumer insights.

How was this report created?

This report was produced by the insights team at Linkfluence, a leading global social intelligence company, using data from millions of social media posts, our proprietary social listening software, Radarly, and the expertise of our CPG in-house industry researchers.

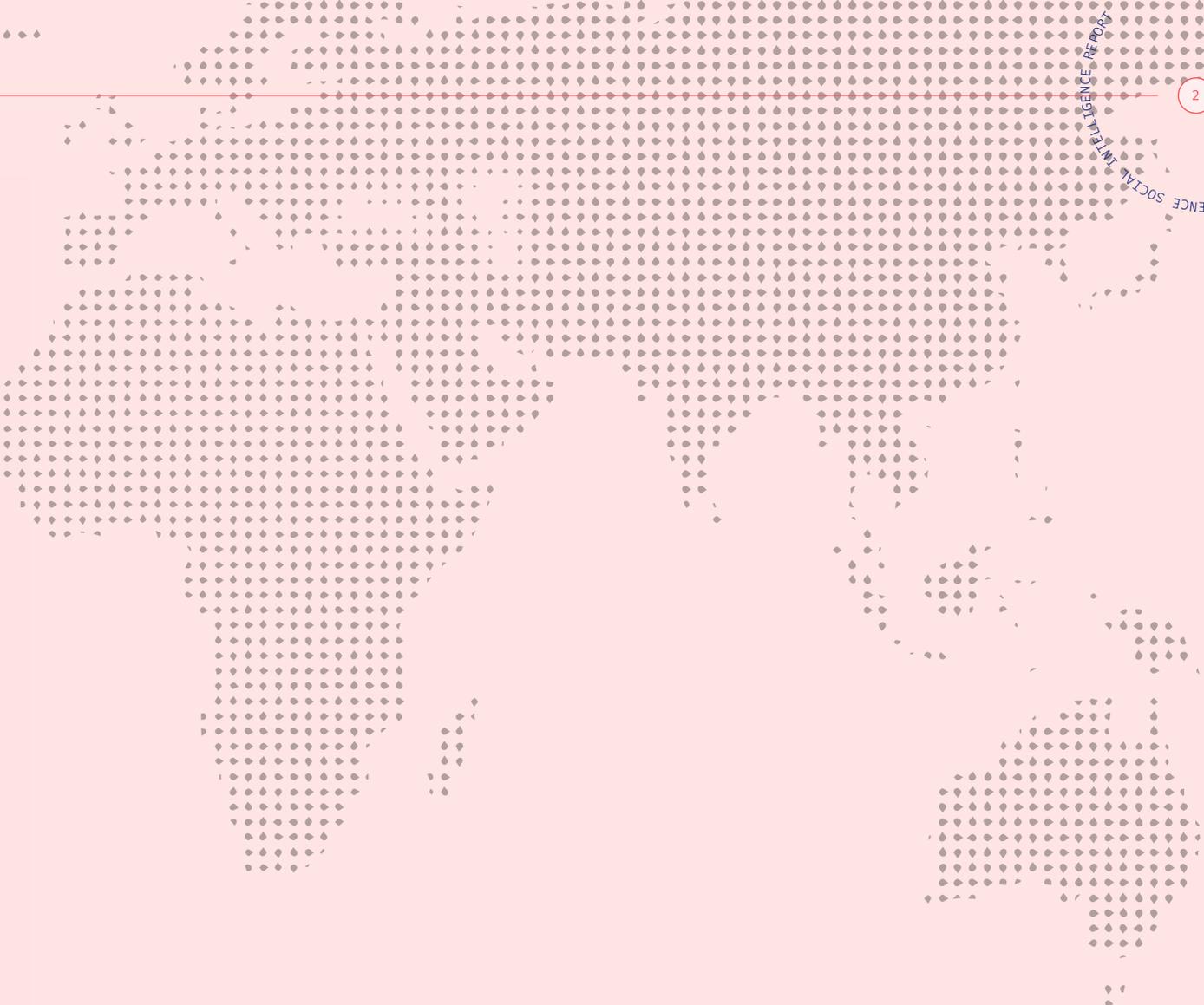
What is the time frame and data analysed for this report?

Scope: English and Chinese worldwide

Timeframe: January 2019 – July 2020

Platforms: Twitter, Instagram, Facebook, Sina Weibo, WeChat, Little Red Book, Douyin, Forums, Reviews, Blogs





Questions addressed in this report:

- How much importance is attached to hygiene and sanitation?
- How are consumer's hygiene habits being impacted by the pandemic?
- What changing circumstances are driving this?
- How are heightened consumers attitudes around efficacy and safety impacting the future positioning of household products?
- What do current attitudes and behaviors indicate for possible future scenarios that businesses should be prepared for?
- What new needs remain unmet?

!	Contributors
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	Hannah Issa → Art direction + design

"We're often asked if these healthy hygiene habits will continue. In short, they likely will not if we do not support them with product experiences optimized for the shifting behaviors."

MAX BERNEY, DESIGN RESEARCHER AND STRATEGIST, RECKITT BENCKISER

Contents

Why social media intelligence? 04

How big is the hygiene conversation in the US, UK, and China? 05

Fighting the invisible: External environment and lack of control 08

PART 1: HYGIENE MEASURES OUTSIDE THE HOME 10

Key figures for hygiene outside the house 11

1.1 The use of hand sanitizer 14

1.2 The use of gloves 16

1.3 The use of sanitizing wipes 18

1.4 The use of UV disinfection bags (China only) 19

PART 2: HYGIENE MEASURES AT HOME 20

Key figures for maintaining hygiene at home 21

2.1 The importance of decontamination lock 23

 2.1.1 A decontamination space in the home entrance 24

 2.1.2 The importance of hand washing 24

 2.1.3 Clothes seen as the second most important germs-carriers 26

 2.1.4 Preoccupations and cleaning process regarding food and packaging 26

2.2 Beyond cleaning: deep cleaning and decluttering 27

 2.2.1 Deep cleaning 27

 2.2.2 Decluttering 29

2.3 Hygiene in the various rooms of the home 30

THE NEW NORMAL 32

PART 3: BODYCARE UNDER COVID 33

3.1 No makeup 34

3.2 No hair washing 35

3.3 No deodorant 36

3.4 No shaving 36

3.5 Intensive skincare and body care 37

3.6 Move to a safer skin and body care regime 37

PART 4: SUBSCRIPTION BOX 38

WHY SOCIAL MEDIA INTELLIGENCE?

100M+

social media profiles
on sites like Facebook,
Twitter, Instagram and more.

200M+

posts per day on traditional
web sources like forums,
blogs and websites.

A ground-breaking approach to insights that matches the speed of modern digital consumers' lifestyles.

The web is the largest focus group:

- Unbiased, unsolicited and objective
- Massively significant data
- Unprecedented speed of delivery

What makes so

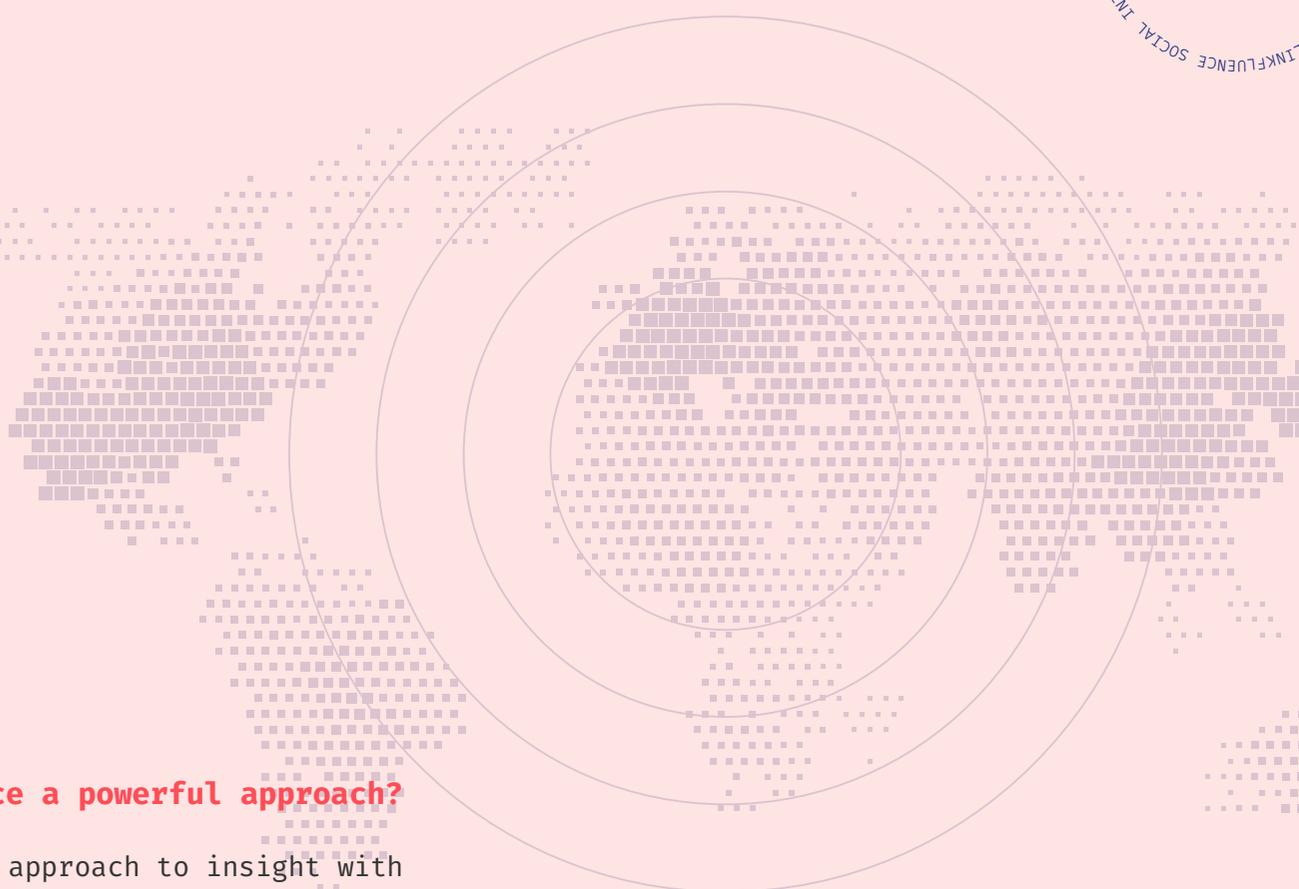
Social intelli
speed, depth a

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identify and u

1 Unstruc

- Words
- Phrases
- Images
- Hashtags
- Emojis
- Locations

DIA



Social intelligence a powerful approach?

... intelligence is a modern approach to insight with ... and breadth.

... combines powerful tools and human expertise to ... understand markets and consumers' trends.

1	Structured raw data
	<ul style="list-style-type: none"> → Links → Behaviors → Demographics → Times → Platforms → Devices

2	Data structuring technology and process
	<ul style="list-style-type: none"> → AI → Data science → Market expertise

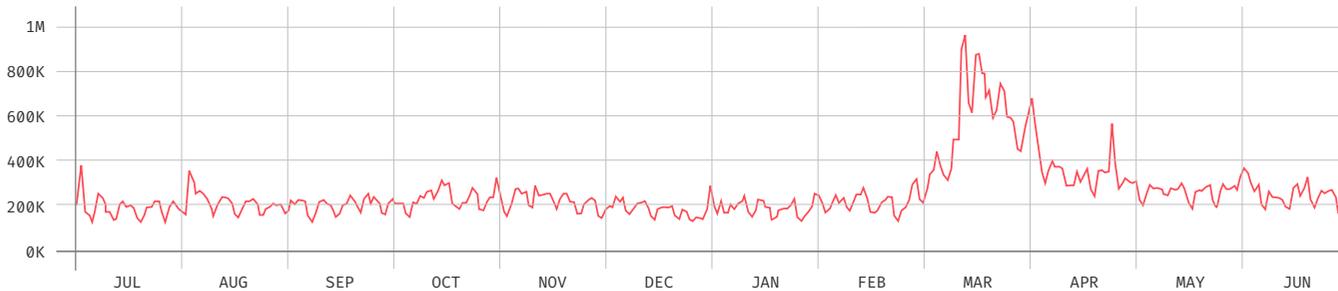
3	Actionable intelligence
	<ul style="list-style-type: none"> → Psychographics → Conversation drivers → Topics and emotions → Tribes + communities → Audiences → Influencer topic authority → Trend prediction → Occasions → Brand and category attributes

HOW BIG IS THE HYGIENE CONVERSATION IN THE US, UK, AND CHINA?

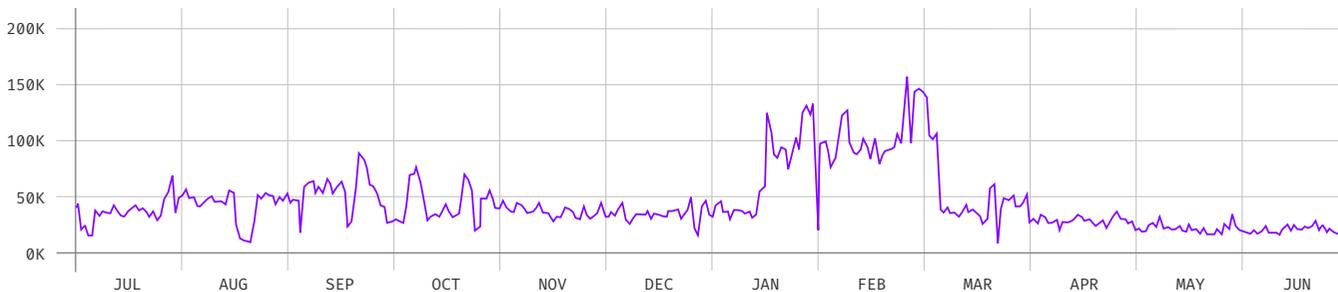
The hygiene conversation exploded after the spread of the COVID-19 virus and ensuing pandemic. While that may not be a surprise, what's important is that while the volume of conversations decreased after the lockdown periods began, the topic of hygiene remained much more conversational than before the pandemic, indicating that there is likely to be a long-lasting if not permanent shift in consumer attitudes into the future.

There were **673,000** conversations about hygiene in the US, UK, and China between January and June 2020: **424,000** in the US and the UK, and **249,000** in China.

EVOLUTION OF HYGIENE CONVERSATIONS OVER THE PAST YEAR IN THE UK AND THE US



EVOLUTION OF HYGIENE CONVERSATIONS OVER THE PAST YEAR IN CHINA





How to love and embrace my natural self. I realized I stopped doing my makeup and shaving less frequently since lock down. Not having the pressure that society puts on us to have a look a certain way has reminded me why I used to do some things I did. If I'm comfortable walking around my house with legs that aren't smooth or having a bare face all the time then why should I feel the need to change those things when I'm in public. Don't get me wrong some times I like to wear makeup or having freshly shaved legs can be more comfortable but from now on I will only do these things for ME!! Everyone has different preferences and if mine are different then yours that's okay!! •



[liveslife_ontheveg](#) dancing it out or double checking my s
🤔?! maybe a little bit of both 😊

life has been has been pretty uncertain lately -

BUT your deodorant shouldn't be! Aka that is uncertain if
working or if it's safe to use)

My tag line of quarantine is that there seriously has been
better time to try natural deodorant because no one is sm
you in quarantine!! So, why natural deodorant?

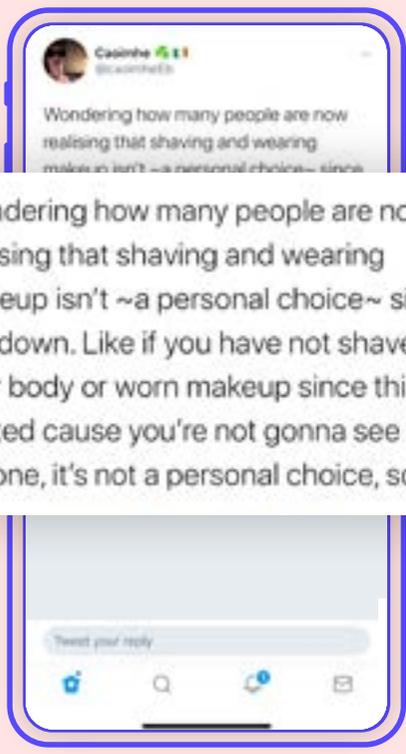


CONVERSATION EXAMPLES

This small sample of posts about hygiene shows the diversity of data analysed in this report.



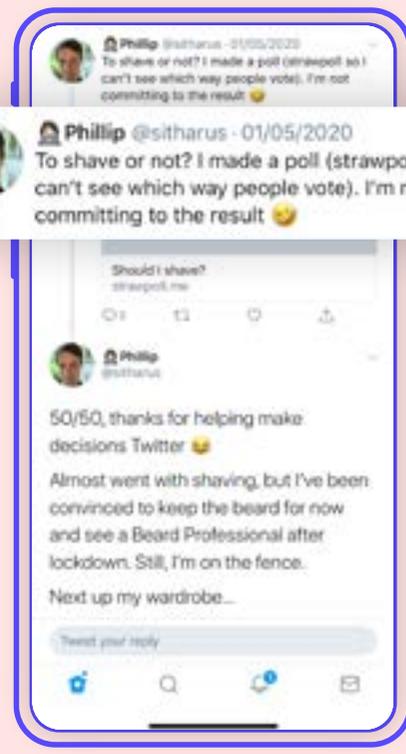
I was feeling super confident at the time and wanted to show off the feminist in me with my hairy legs and pits. BUT it took me a further 2 weeks to actually find the courage to post it. Then when I was feeling confident enough I realised all the hashtags relating to hairy pits had been hidden because the community reported some content that may not meet Instagram's community guidelines. This stopped me from



Wondering how many people are now realising that shaving and wearing makeup isn't ~a personal choice~ since lockdown. Like if you have not shaved your body or worn makeup since this started cause you're not gonna see anyone, it's not a personal choice, soz



Not shaving is not me making a statement, it's a choice



Phillip @sitharus - 01/05/2020
To shave or not? I made a poll (strawpoll so I can't see which way people vote). I'm not committing to the result 😊



Should I shave?
strawpoll.me
50/50, thanks for helping make decisions Twitter 😊
Almost went with shaving, but I've been convinced to keep the beard for now and see a Beard Professional after lockdown. Still, I'm on the fence.
Next up my wardrobe...

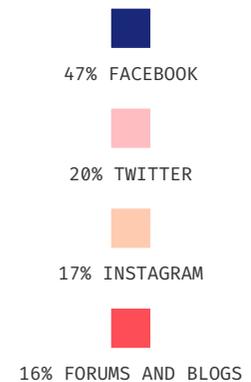
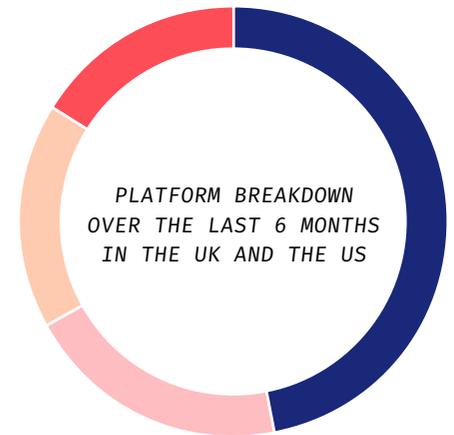
Where are people talking about hygiene?

FACEBOOK is primarily used by brands to give advice on hygiene and sanitation or to publish content about their products. While consumers engage with brands on Facebook, the majority of consumer voice is on other platforms.

TWITTER is most often used to share opinions on social issues, news, and politics, and was the focus of debate around government hygiene protocols, adoption of these protocols, and the political climate surrounding these issues.

INSTAGRAM is used to share life moments. It is the 2nd most used platform for discussing hygiene inside the home, and the 4th for discussion hygiene outside. People share their experiences during the pandemic, usually without referencing another post. It is used to connect with community, to share challenges, and promote hygiene practices.

FORUMS and **BLOGS** are used to share advice or debate. 39% of conversations were posted on Reddit. Example topics of discussion include the necessity of wearing masks, the importance of other safety measures like sanitizing, as well as the importance of social distancing and behaving in accordance with lockdown policies.

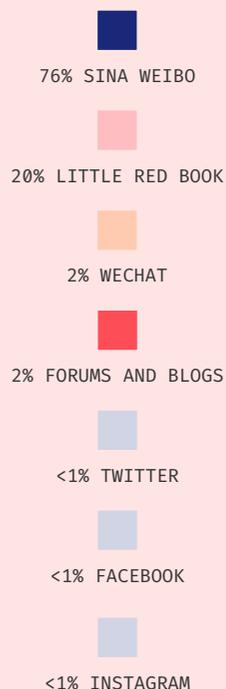


SINA WEIBO is the largest public social media platform in China, and often referred to as “China’s Twitter”. It is both a place for the politicians and brands to share official content, as well as for people to share experiences and opinions on hygiene practices. It is not as politically contentious as Twitter, due to the relative lack of public dissent in China.

LITTLE RED BOOK is primarily used by working women in China between 18 and 35. It enables consumers discover, discuss, share, and buy products in one platform (primarily beauty and health). The platform is a source behavioral insights, and frequently used by beauty and skincare-focused consumers to evaluate hand sanitizers.

WECHAT is the largest, mostly private social messaging and social networking platform in China. Often referred to as the “WhatsApp of China”, this metaphor is a very poor description of the functionalities of WeChat, which is used for virtually every service and transaction in Chinese commerce and society, including a robust ecommerce ecosystem. As the vast majority of WeChat data is private, this is used mostly for public and influencer media analytics.

While still important for some topics and industries, activity on **FORUMS** and **BLOGS** has decreased in China after the widespread adoption of WeChat. Forums like Baidu Tieba, Sina forum, Sohu forum, 163, and Q&A platform ZhiHu remain important, and have different levels of adoption in different regions and audiences in China, but are used more anecdotally and statistically are a fraction of conversations when compared to Sina Weibo.



FIGHTING THE INVISIBLE:

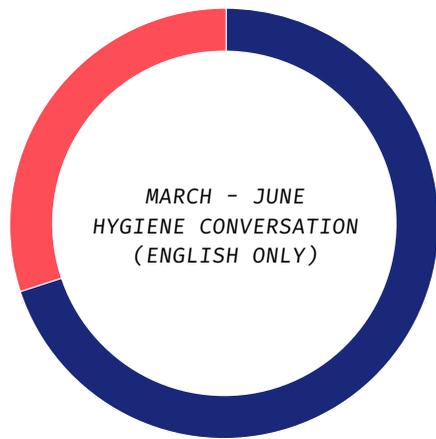
EXTERNAL

ENVIRONMENT

AND LACK OF

CONTROL

Many consumers are concerned about cleanliness, safety, and unmanageable risk when outside the home, while feeling a sense of control and safety while at home. Months of lockdown and social distancing have created time to improve hygiene regimes and ensure that home is a safe haven. When emerging from the safety of lockdown and a perception of control and order, use of common spaces, public transport, and contact with other people challenge this sense of control, especially when combined with differences in opinion about risks involved of engaging in different activities such as dining and non-essential shopping.

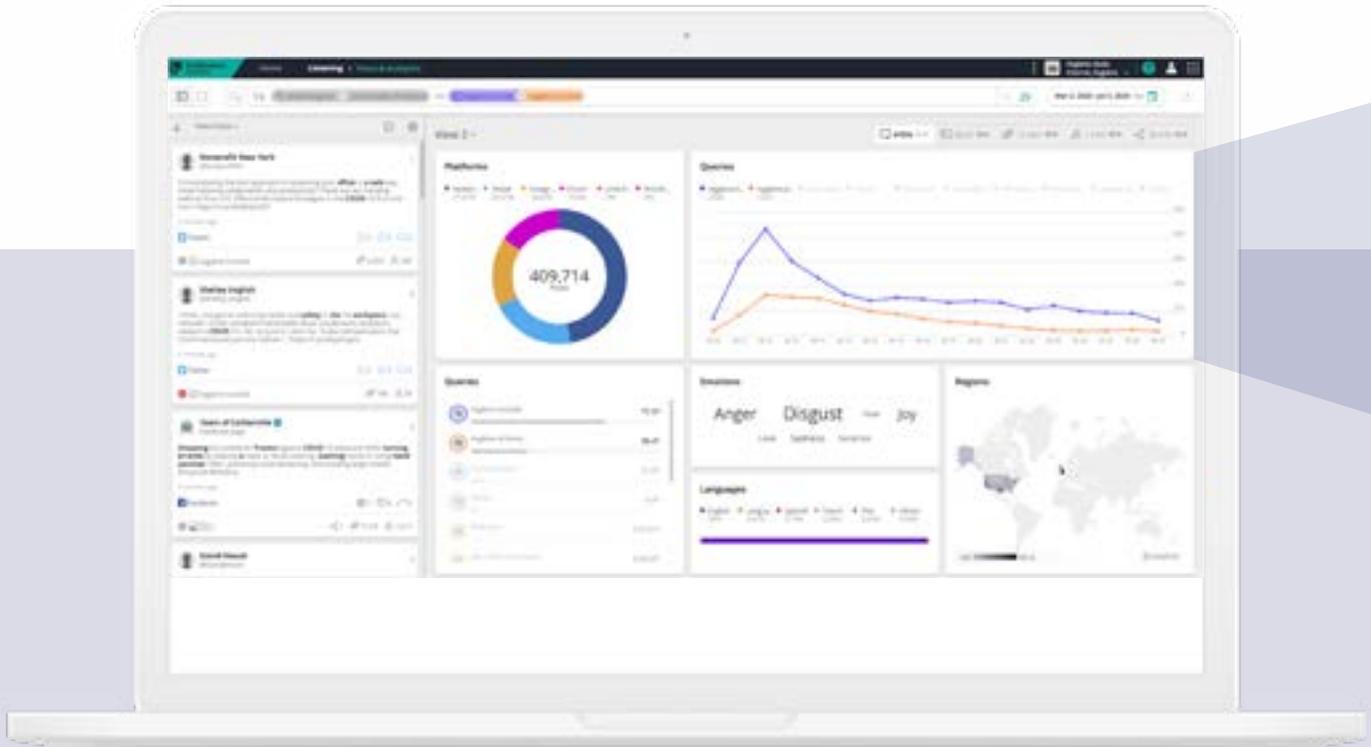


70% HYGIENE OUTSIDE THE HOME



30% HYGIENE AT HOME

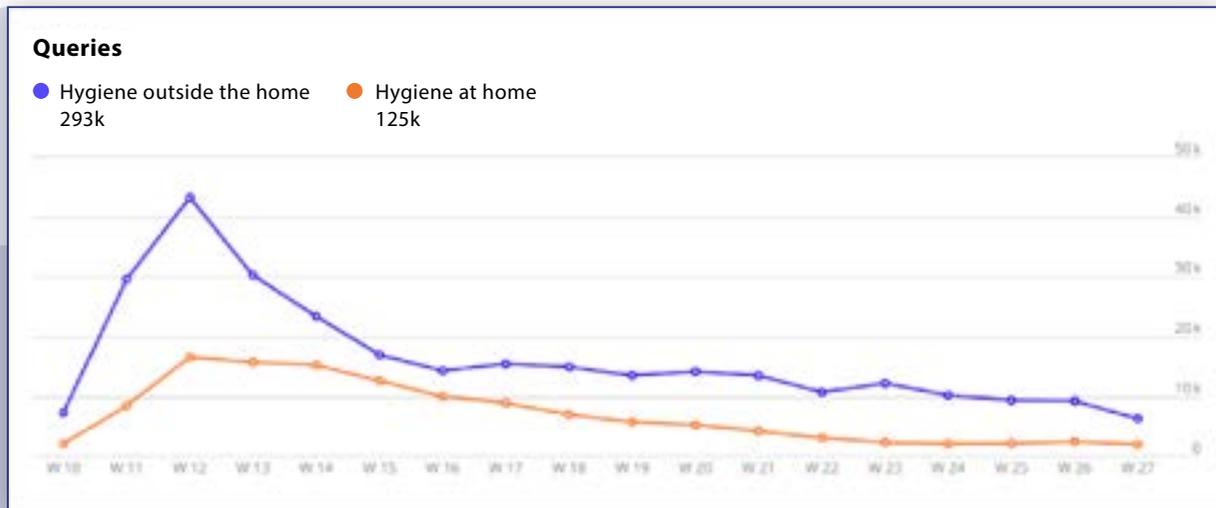
EVOLUTION OF THE CONVERSATIONS REGARDING HYGIENE OUTSIDE AND AT HOME
BETWEEN MARCH AND JUNE IN THE UK AND THE US



The pandemic has raised awareness and concern not only about germs in the outside world, but also in the comfort of one's home. People know they not only have to be careful among each other, but that objects also present risk, and that it's necessary to ensure cleanliness on the many different surfaces we come into contact with daily.

For most, COVID is a wakeup call to the importance of hygiene in the spread of

disease. People who were less concerned with hygiene have realized that the combination of simple safety measures (such as social distancing) with better hygiene can protect themselves and contribute to society's fight against COVID. While this is more divisive and political in the United States, this is especially true in China where many people were poorly attentive to hygiene outside their house before the pandemic.



The outbreak not only changed people's perception of hygiene, but shifted priorities for what they buy. New cleaning and protective products such as hand sanitizer, wipes, and gloves now are commonplace inside homes, bags, and cars.

The most dominant state of mind around hygiene and safety is determination. Both highly vocal influencers and everyday consumer take hygiene very seriously, both on the English and Chinese web. Generally, people are determined to protect their family's safety outside and inside the home, and seek efficient cleaning solutions. This core need is paired with other functional and lifestyle desires such as naturality,

convenience, format, scent, texture, style, and brand – presenting many opportunities for product innovation.

As frequency of use increases, concerns about comfort and harmlessness appear. Comfort is important to them and they do research to find the most suitable product for their needs. Chinese consumers seem especially attentive to smell, texture and composition. They also seek reassurance through scientific claims and automated solutions. While humans might be imperfect and fallible, the perceived dependability of cleaning products and devices provides peace-of-mind during a time of anxiety and complexity.

1.0

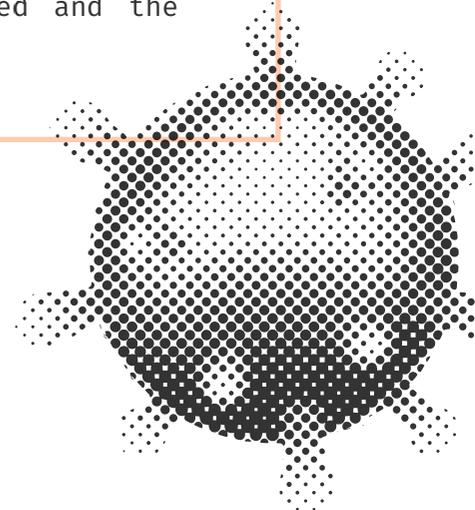
HYGIENE MEASURES OUTSIDE THE HOME



In times of Covid-19, the outside world is seen as a hostile environment. The keyword here is self-protection: avoid getting in contact with the virus, and sanitize one's hands when they have been in contact with a dirty surface. When they go out, consumers have new hygiene rules that they religiously respect to stay safe. Preoccupations regarding hands' hygiene are central in this topic as they represent the main doorway to germs. Thus consumers follow strict sanitizing rules:

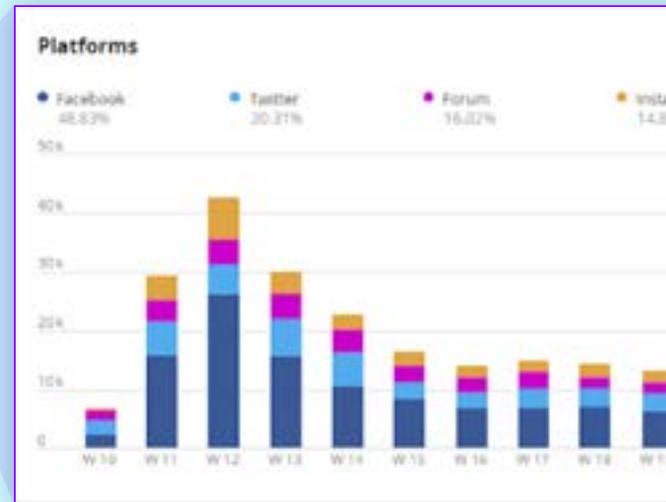
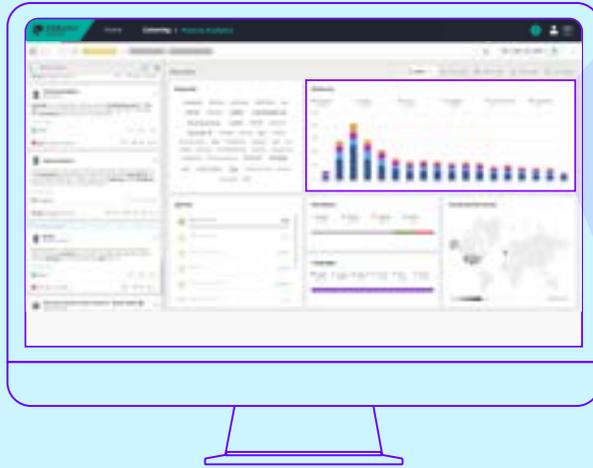
- wash their hands multiple times a day
- use hand sanitizer whenever soap and water are not available
- avoid touching any surfaces that they didn't sanitize before or use sanitizing wipes to clean those surfaces
- wear gloves

In this section, we will concentrate the analysis on the most used products, the context in which they are used and the behaviours associated with those products.

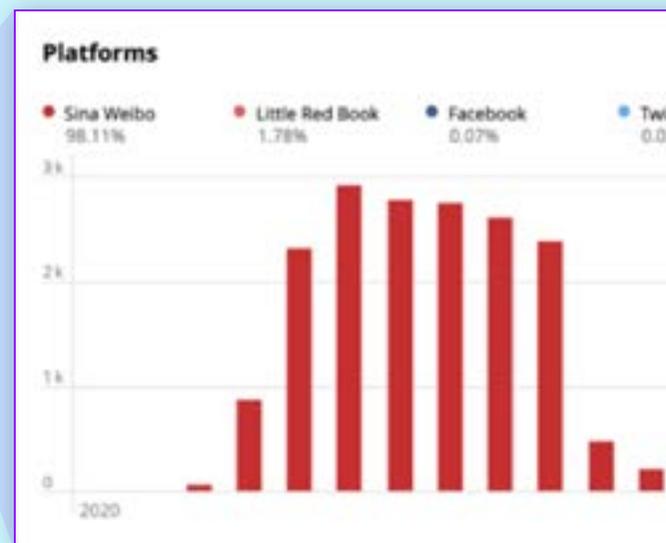
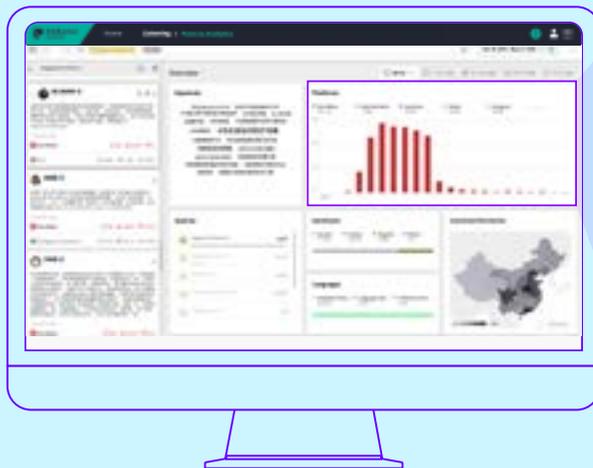


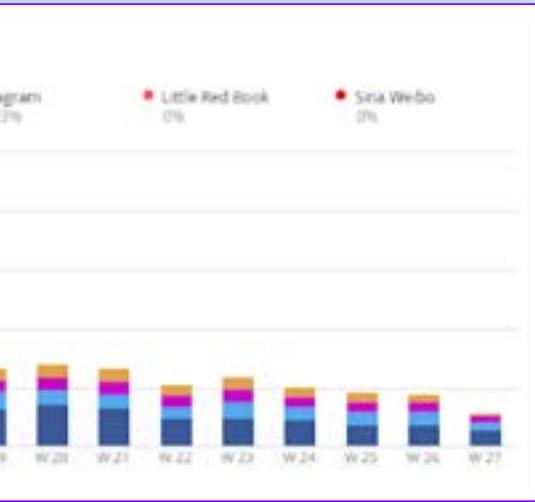
Key figures for hygiene outside the house

EVOLUTION OF THE NUMBER OF POSTS REGARDING HYGIENE OUTSIDE AND COVID BETWEEN MARCH AND JUNE IN THE UK AND THE US

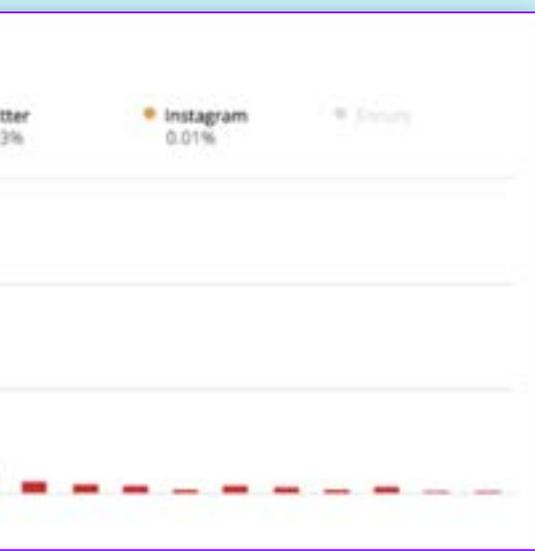


EVOLUTION OF THE NUMBER OF POSTS REGARDING HYGIENE OUTSIDE AND COVID-19 OVER THE LAST 6 MONTHS IN CHINA





The peak of verbatim observed above corresponds to the lockdown declared in the US and in the UK which caused numerous discussions on safety measures with regards to hygiene.

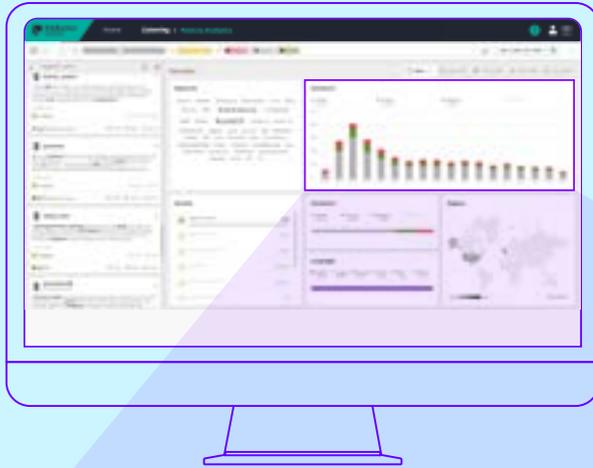


Both the EN and Chinese curves show a rapid rise of concerns at the beginning of the lockdowns in the respective countries (January for China and March for the US and UK) and then progressive decreases over the months.

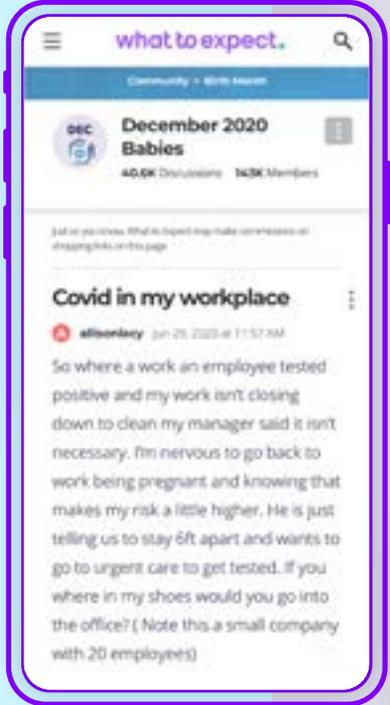
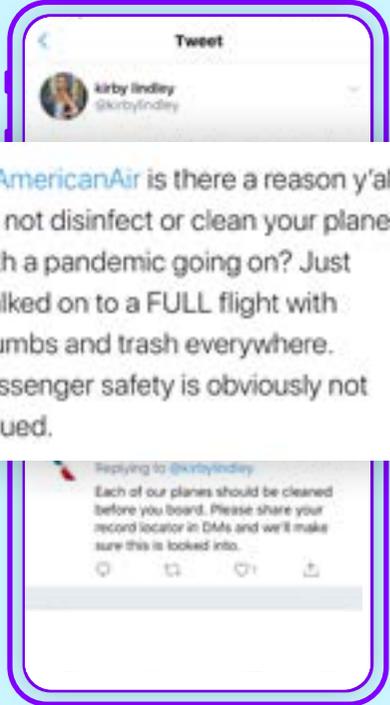
We will see later on in the document that the corresponding curve for Hygiene inside the house in the US and UK is slightly different, making us think that people's concerns regarding hygiene measures inside remained more stable than their concerns regarding hygiene measures outside the house.

Key figures for hygiene outside the house

EVOLUTION OF THE SENTIMENT ASSOCIATED TO PUBLICATIONS REGARDING HYGIENE AND THE COVID-19 IN THE UK AND THE US



Social media examples



Here's a #ChallengeWithACause - post a photo of yourself wearing a mask, copy & paste this caption so we can spread the word:

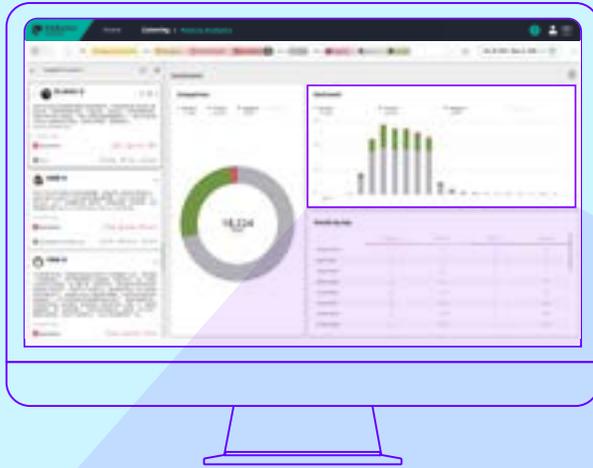
1. Wearing a mask prevents the transmission of COVID-19 (from you to others & vice versa) via sneezing, coughing & even breathing
2. Don't have a mask? Well DIY (you have time) because even a DIY mask can prevent the spread of 95-100% potentially infected micro droplets.
3. #masks4ALL - Czech Republic has slowed down the spread of the virus because they all wore masks. We can do it too! 🇨🇪 Challenge as many people as you can to #FlattenTheCurve and to spread the love & not the virus! I challenge ... YOU 😊

The neutral tone corresponds to factual statements, mentions holding no sentiment or mentions in which the sentiment is mixed (both positive and negative). As we saw it before, Facebook is responsible for a great part of the mentions and is used by brands giving advice on hygiene and sanitation or recommending their products. Those publications are considered neutral.

The negative tone mostly refers to the no-respect of safety measures outside. People complain about others not wearing masks in public places or the no-respect of safety measures in workplaces or the absence of sanitizing products in public transportation means such as planes. The positive sentiment refers to good practices in terms of sanitation or the exchange of tips between users.

Key figures for hygiene outside the house

EVOLUTION OF THE SENTIMENT ASSOCIATED WITH PUBLICATIONS REGARDING HYGIENE AND THE COVID-19 IN CHINA



Social media examples



POST TRANSLATION:

"Everyone should follow the orders, don't go out for an unnecessary run."



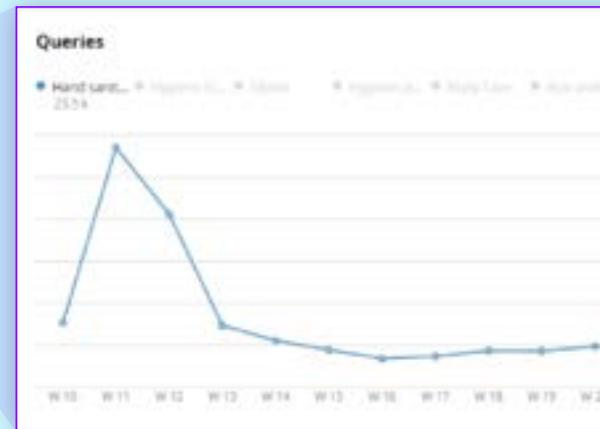
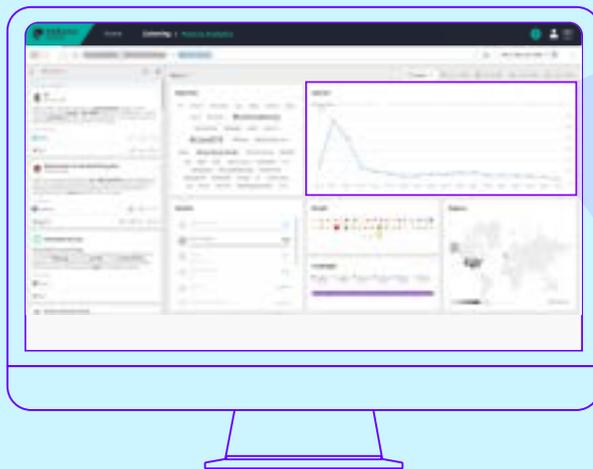
POST TRANSLATION:

"The first station to Qinghe. The impact of the epidemic is very little traffic. Wearing masks is particularly uncomfortable, it's not convenient to eat or breathe.
- Beijing Qinghe Station"

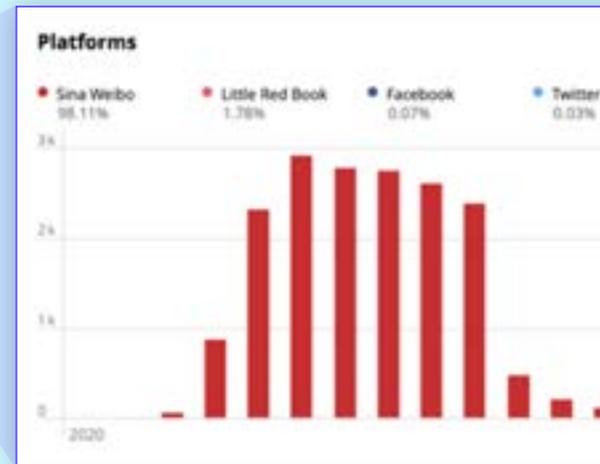
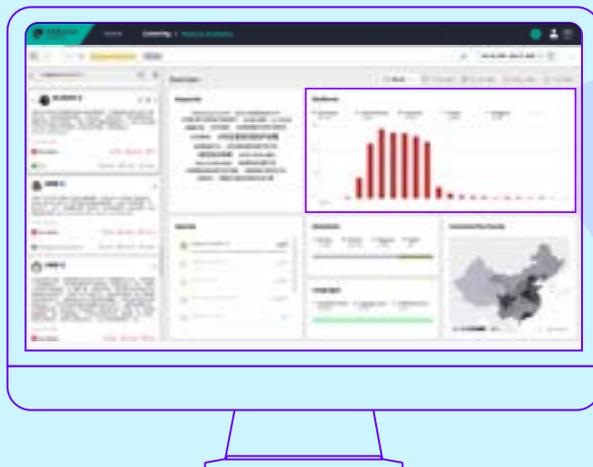
The negative conversation in terms of hygiene outside in China mainly goes into the unregulated outing activities during the lockdown. Chinese netizens point out that those unrespected activities pose a threat to others health. Some customers also mentioned uncomfortable experiences of wearing masks and gloves, mainly at the beginning of the outbreak.

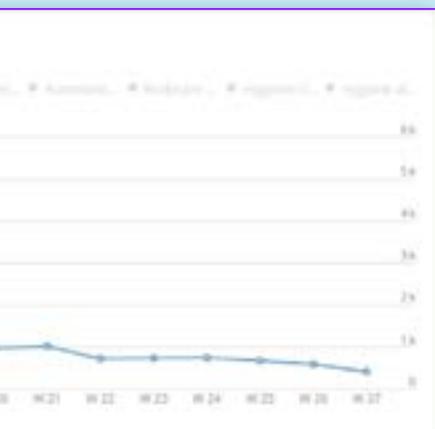
1.1. HAND SANITIZER

EVOLUTION OF THE VOLUME OF POSTS REFERRING TO HAND SANITIZERS BETWEEN MARCH AND JUNE IN THE UK AND THE US



EVOLUTION OF THE NUMBER OF POSTS REGARDING HYGIENE OUTSIDE AND COVID-19 OVER THE LAST 6 MONTHS IN CHINA





Hand sanitizers are the most used products when consumers are outside.

Their portable size makes them convenient items to carry everywhere: in the transports, at the park, at protests etc.

Note that their use was not common among Chinese consumers before the pandemic. With the Covid spread, they started using them regularly to ensure clean hands or in risky situations after touching products. Chinese consumers also prefer to buy large containers of hand sanitizers because it's cheaper and it prevents them from going to buy some too often, and the risks of shortage. They then use smaller refillable containers.



INNOVATION SIGNAL
Large containers + refillable portable containers

1.1 HAND SANITIZER

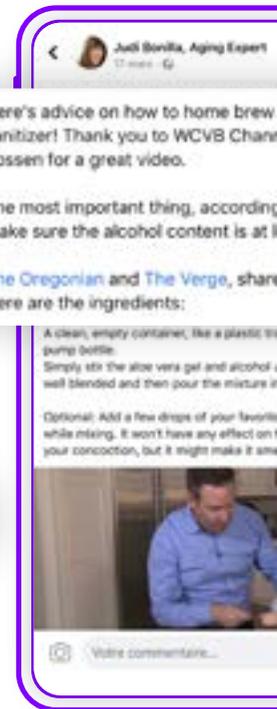
continued

Also, consumers see hand sanitizers as products that can easily be shared with other people. They are happy knowing they contribute to encourage hygiene in others. In fact, they feel a responsibility to perform barrier gestures such as using hand sanitizer to help fight Covid on their scale. Using hand sanitizers makes them feel like they are contributing to the fight against Covid-19 in society. Consumers keep them in accessible places to not forget to sanitize: by the exit door of their house, in their car, at work by their desk. They need them to be disposable as a reminder to always keep their hands and other people's hands clean and disinfected.

On the English web, we note very little feedback regarding the smell (77 posts) or texture of hand sanitizers (14 posts). People either talk about the smell in a neutral way or state that despite the smell, hand sanitizers are the only alternative to soap and water or that they like a particular type because it smells good. The smell is not considered as a reason to not use hand sanitizer. As for the stickiness, it is rarely mentioned except by people advocating for certain brands or making their own hand sanitizer.

The impact of the use of hand sanitizer on the skin is also rarely mentioned.

Social media examples

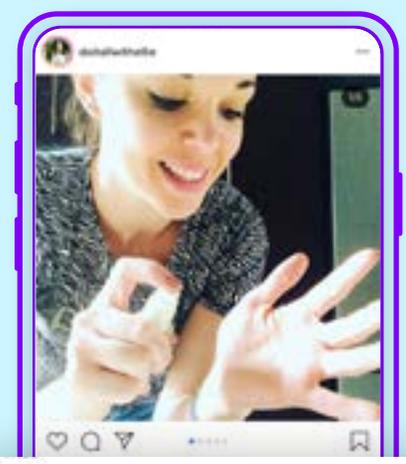


On the Chinese web however, consumers are picky and not satisfied with using basic hand sanitizers. They check product reviews to insure a comfortable user experience and are attentive to the composition, the texture, the smell or to the fact that they are not damaging their hands. Some consumers also mention they use the hand sanitizers at home because of their nice smells.

Note that a fraction of people felt encouraged, by the shortage but also in order to control the composition of the products they apply on their skin, to produce and sometimes sell homemade hand sanitizer (376 posts, 2% of the total mentions



POST TRANSLATION:
 "Bobore's hand sanitizer is really easy to use! As an alcoholic hand sanitizer, the fragrance will last for a long time after the alcohol evaporates. Good product!..."



doitallwithelle OHomemade hand sanitizer!
 Happy Saturday beautiful Homemakers! Since the shelves are emptying on hand sanitizers HERE is a recipe you can make at home:
 Spray bottle
 20 ml antiseptic
 30 ml dish soap / liquid soap
 30 ml Lemon juice
 30 ml Vinegar
 300 ml water

regarding hand sanitizers). In that context, they highlight the cleanness of the composition of those products, the fact that it's not sticky and the fact that it is scentless or that they add essential oil for a nice smell.

The alcohol contained in hand sanitizers holds a certain place among the conversations.

On the English web, the amount and type of alcohol needed in homemade hand sanitizer is discussed. It is mentioned, on several occasions, that an excess of alcohol could falsely be associated with more safety and efficiency when, in reality,

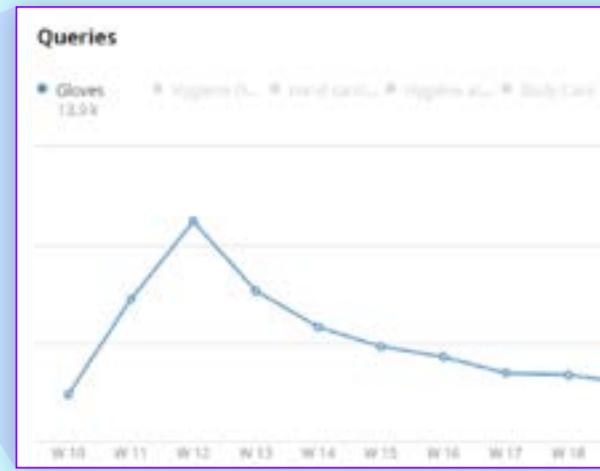
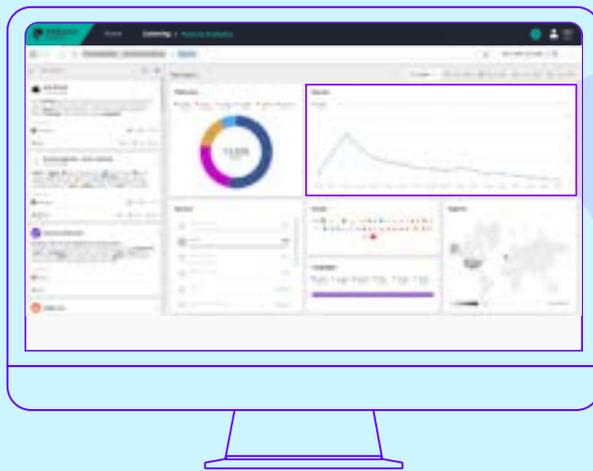
it would only make homemade hand sanitizers more aggressive for the skin.

On the Chinese web, many consumers complain that hand sanitizers cannot pass the metro security check due to the presence of alcohol.

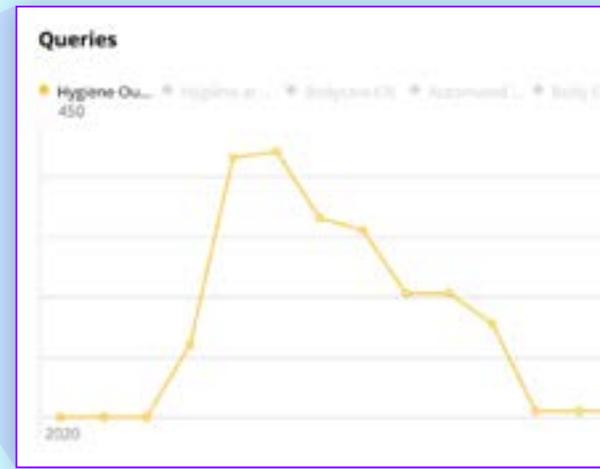
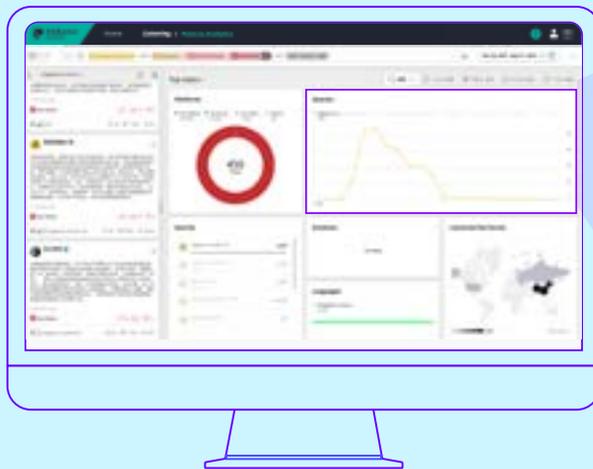
On the English and the Chinese scopes, big opportunities to address these strong unmet needs around hand sanitizers: bad smell, stickiness, presence of alcohol, harmfulness. While keeping high the promise of disinfection.

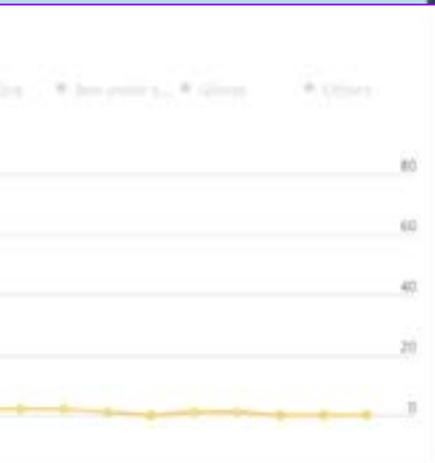
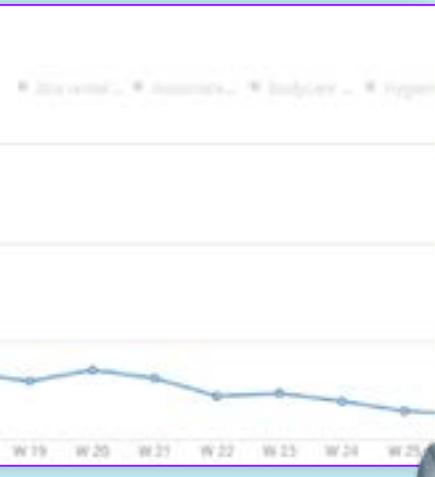
1.2 GLOVES

EVOLUTION OF THE VOLUME OF POSTS REFERRING TO GLOVES BETWEEN MARCH AND JUNE IN THE UK AND THE US



EVOLUTION OF THE VOLUME OF POSTS REFERRING TO GLOVES OVER THE LAST 6 MONTHS IN CHINA





Behaviours towards gloves are overall the same on the English and Chinese web. If hand sanitizers seem to be considered as the go-to for each situation for its practicality and efficiency, the use of gloves is the subject of mixed opinions.

On the one hand, we see consumers who are convinced that wearing gloves will protect them from catching the Covid-19. For those people, gloves represent a physical barrier that provides several benefits:

- Gloves prevent them from being in contact with infected items when outside. Gloves are especially used by consumers when they go shopping. Chinese consumers put gloves on the same level as masks in terms of efficient hygiene measures.
- Gloves are a protection for people with sensitive skin such as people with dry hands (20) because of hand sanitizers, people suffering from skin affections (eczéma) and can't use hand sanitizers.
- Gloves represent practicality and comfort as consumers are free to use their hands as they please.

1.2 GLOVES

continued

Gloves' advocates seem to understand the limits of their use (= the fact the external surface of gloves is dirty). They are either careful when retrieving them or they are careful to sanitize their gloves as it was their hands. Gloves are considered extensions of their own hands.

Note that consumers need the gloves to be disposable for practicality reasons (they always keep a box in their car for instance) and to feel prepared and protected.

Social media examples

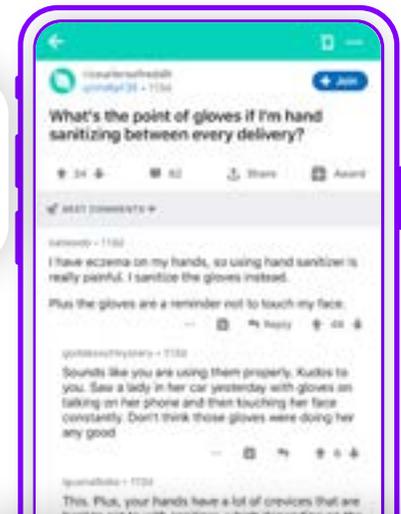


POST TRANSLATION:

"Go to the supermarket to stock up on everything, buy groceries, and press the elevator button to throw garbage... Remind again!"

POST TRANSLATION:

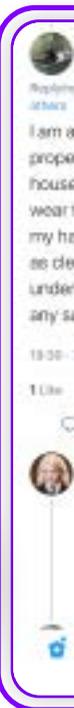
"Masks are no longer enough to express respect: Gloves are! –Nanjing Nanjing Lukou International Airport



karleee0 • 113d

I have eczema on my hands, so using hand sanitizer is really painful. I sanitize the gloves instead.

Plus the gloves are a reminder not to touch my face.

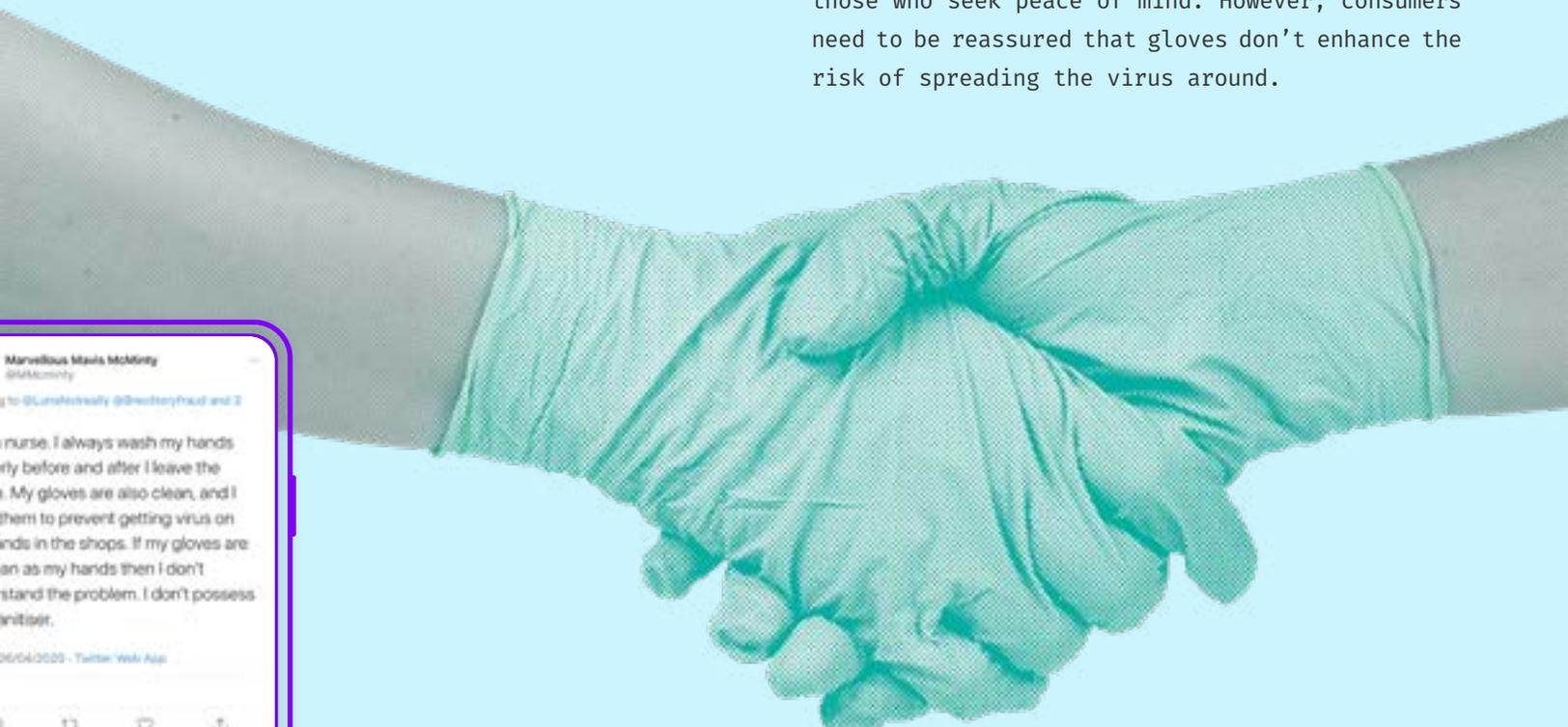


On the other hand, gloves’ detractors think their use may increase the risk of catching Covid-19. They think gloves play the role of transfer of the virus from one place to another: keys, bike lock, door handle at the restaurant, food, phone, handlebars, the buzzer/callbox and front door. According to them, people wearing gloves are not always aware of the fact that the virus can stick to their gloves and do not take all necessary precautions when retrieving them.

As opposed to gloves’ advocates, they believe that wearing gloves provides you with a false sense of protection resulting in people being more negligent.

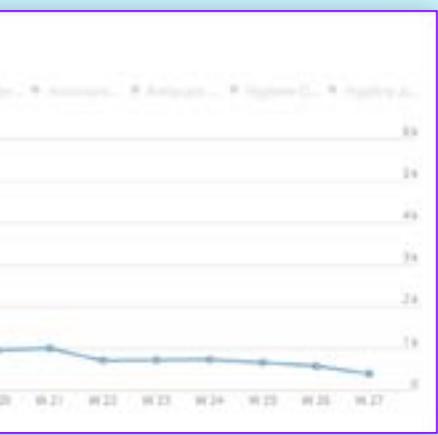
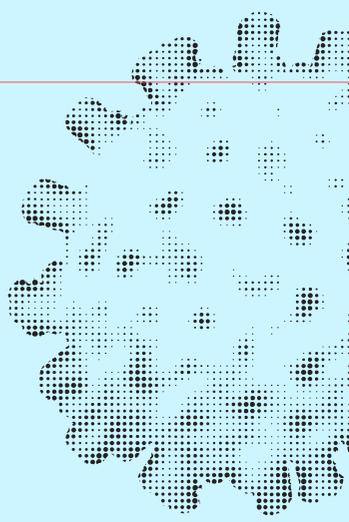
On the Chinese web, consumers are rarely using gloves because they are not user-friendly: too bothering to be deprived from the sense of touch.

By creating a barrier between hands and their environment, gloves are of great interest for those who seek peace of mind. However, consumers need to be reassured that gloves don’t enhance the risk of spreading the virus around.



INNOVATION SIGNAL

Gloves coated with detergents. The discomfort linked with the loss of the sense of touch could also be addressed.



After hand sanitizers and gloves, wipes are the third most used products for both Chinese and English consumers.

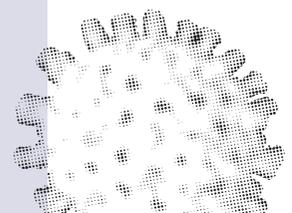
In the top left graph, the peak in May is due to fitness local centers in Texas posting about the hygiene measures taken to ensure their customer's safety.

The sentiment towards sanitizing wipes is more positive than the one regarding gloves.

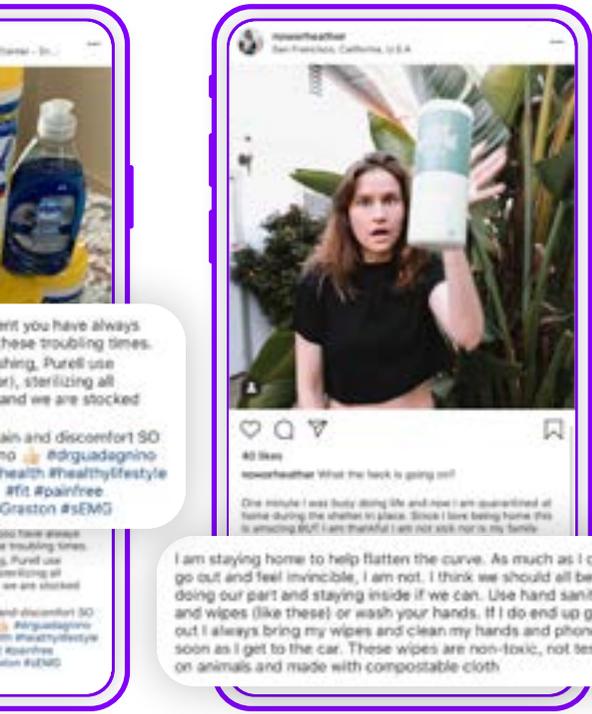


Wipes are appreciated for their practicality and the immediate sense of cleanliness they bring. They bring consumers peace of mind. Note that for Chinese consumers who were complaining about hand sanitizers not passing security checks in metros, trains or planes because of the presence of alcohol, wipes are the ideal alternative.

Wipes also bring a sense of double safety, through the chemical action of the detergent, coupled with the mechanical human action of cleaning the surfaces; it is therefore seen as very efficient, and gives a reassuring feeling of control.



1.4 UV DISINFECTION BAGS (China only)



...ent you have always
...these troubling times.
...thing. Purell use
...er), sterilizing all
...and we are stocked

...ain and discomfort SO
...no #drguadagnino
...health #healthylifestyle
...#fit #painfree
...Graston #EMG

I am staying home to help flatten the curve. As much as I can go out and feel invincible, I am not. I think we should all be doing our part and staying inside if we can. Use hand sanitizer and wipes (like these) or wash your hands. If I do end up going out I always bring my wipes and clean my hands and phone as soon as I get to the car. These wipes are non-toxic, not tested on animals and made with compostable cloth

About 414 posts mentioned the UV disinfection bag system on the Chinese web. Those bags disinfect items by using UV light. Consumers put their potentially infected belongings, such as keys, the cellphone, earphones, and even the mask, in the bag and the items come out germ-free.



POST TRANSLATION:
 "...It is especially important to disinfect your belongings during the epidemic prevention period. Youyi mobile phone UV disinfection kit can not only disinfect the mobile phone, but also disinfect many small objects: earphones, glasses, jewelry...all that can be put in can be disinfected~ It is clean and super safe!..."

INNOVATION SIGNAL

Wipes are strong allies of consumers in these times where consumers look for gaining control about the hygiene of their environment. But as sustainability remains a very strong driver, the opportunity for proposing eco-friendly wipes remains strong (e.g. made with recycled materials, compostable, biodegradable...)



2.0

HYGIENE MEASURES AT HOME





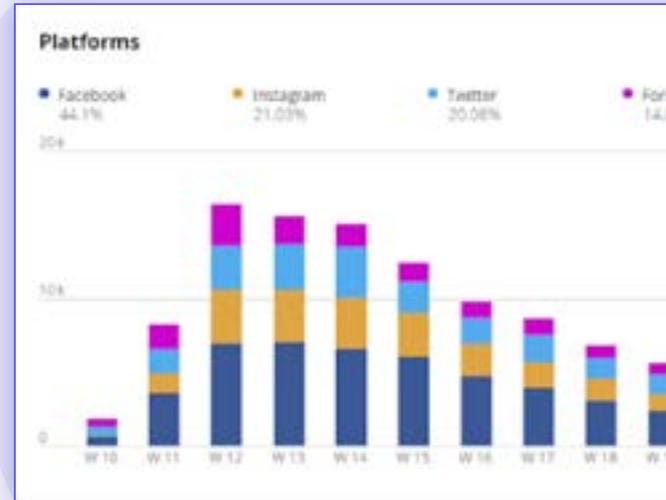
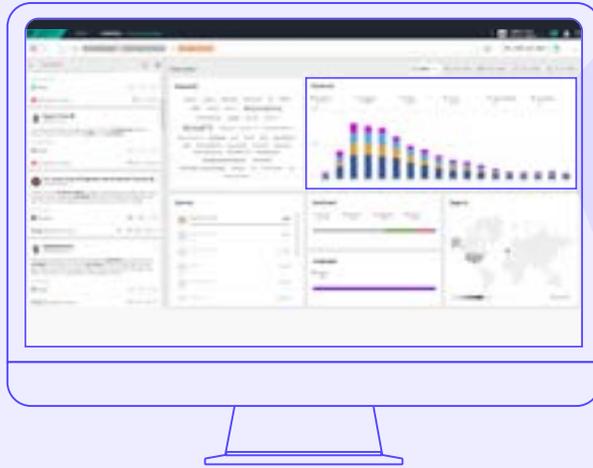
As mentioned earlier, many consumers' biggest perceived threat is danger from outdoors coming into their safe space. Many people have established a physical (and psychological) “decontamination zone” at the entrance to their home, both to decontaminate themselves and anything that might be germ-infested, such as clothing, food, and packaging.

This is especially important for Chinese consumers who live in multigenerational households: they're not only responsible for the safety of their children and spouse but also their parents, who are older, more vulnerable, and more likely to have health issues.

In this section, we showcase the different steps taken by consumers to decontaminate themselves and their environment. We will also examine the perception of hygiene in various rooms and how these household spaces are prioritized and kept healthy and clean.

Key figures for maintaining hygiene at home

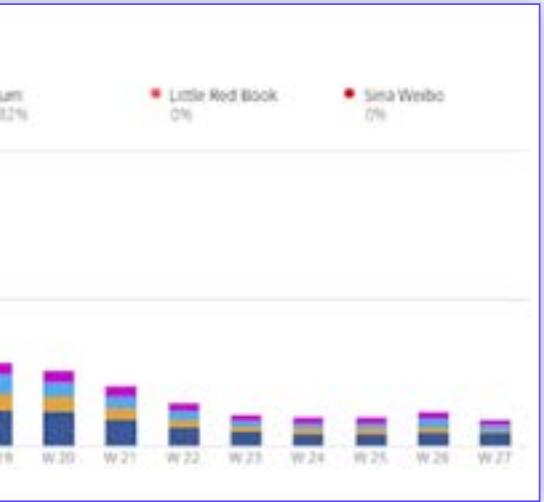
EVOLUTION OF THE NUMBER OF POSTS REGARDING HYGIENE INSIDE AND COVID-19 BETWEEN MARCH AND JUNE IN THE UK AND THE US



EVOLUTION OF THE NUMBER OF POSTS REGARDING HYGIENE INSIDE AND COVID-19 OVER THE LAST 6 MONTHS IN CHINA



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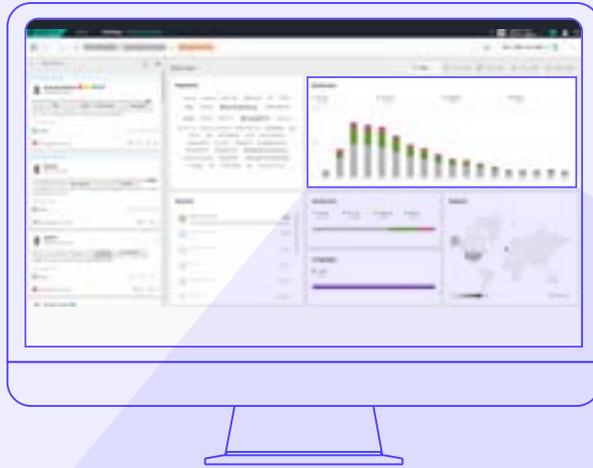


An increase in the volume of conversations is significant during the lockdowns in the UK, US and China. We note that the decrease in volume is slightly less abrupt in the UK/US curve than it was for hygiene measures outside the house. This could mean that people remained more attentive to maintain strict sanitation measures outside their home even when the lockdown was lifted.

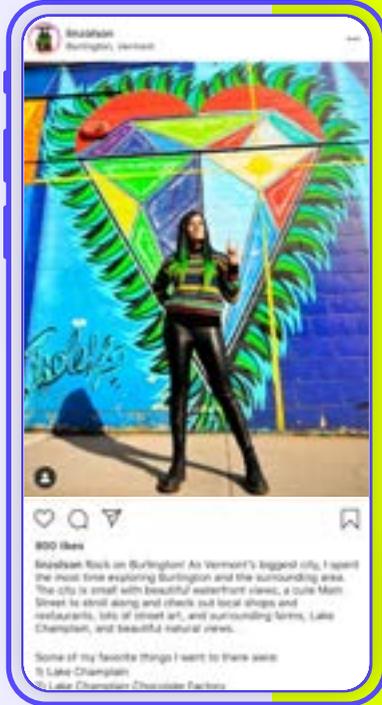


Key figures for maintaining hygiene at home

EVOLUTION OF THE SENTIMENT ASSOCIATED TO PUBLICATIONS REGARDING HYGIENE INSIDE AND THE COVID-19 IN THE UK AND THE US



Social media examples

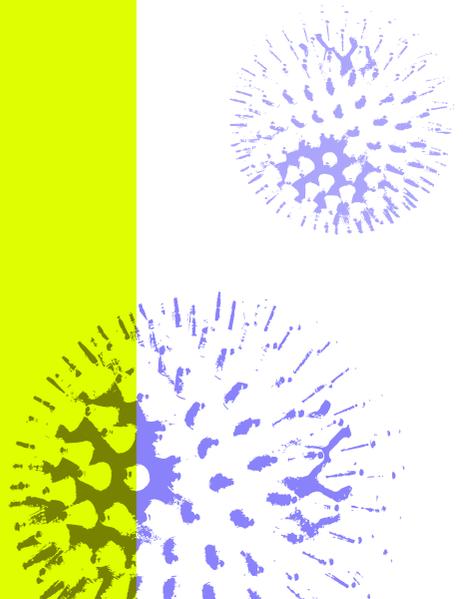


I feel guilty for complaining. I feel guilty that I am writing about my struggles when I know there are people who have it so much worse. I feel guilty that I am feeling anxious and depressed being stuck at home when I know there are a ton of people who wish they could live in a reality that allowed them to feel safe and content at home. I know there are people who don't know where their next meal is coming from. I know there are people who are struggling way more than I am. I just feel guilty.

The positive sentiment refers once again to good practices in terms of sanitation, the promotion of certain brands that proved to be efficient, people spreading positive messages.

The negative tone refers to people feeling insecure in their house because of the reckless behaviour of people living in the same household, or feeling paranoid and inclined to extreme behaviours in terms of hygiene.

Also, a few conversations are linked to how people feel trapped and forced to stay at home and who are not happy about the situation. We also note a few conversations about people feeling depressed at home.



Key figures for maintaining hygiene at home

EVOLUTION OF THE CONVERSATIONS REGARDING NEW HYGIENE MEASURES (USING HAND SANITIZERS, WEARING GLOVES, USING WIPES) OVER THE LAST YEAR IN THE UK AND THE US



EVOLUTION OF THE CONVERSATIONS REGARDING NEW HYGIENE MEASURES (USING HAND SANITIZERS, WEARING GLOVES, USING WIPES) OVER THE LAST YEAR IN CHINA



It is once again pretty clear from this timeline that the use of hand sanitizers, protective gloves or wipes wasn't a topic of conversation before the pandemic.

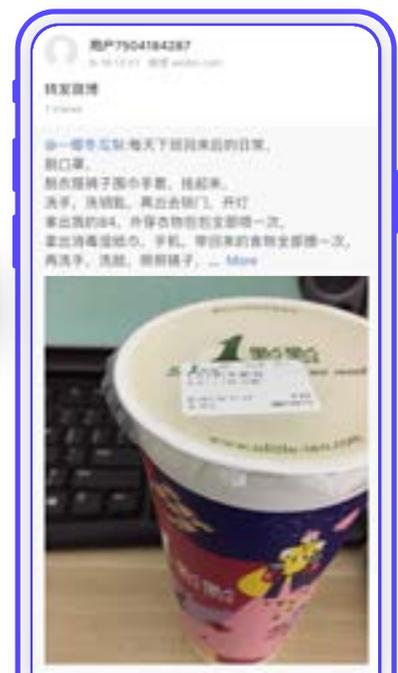
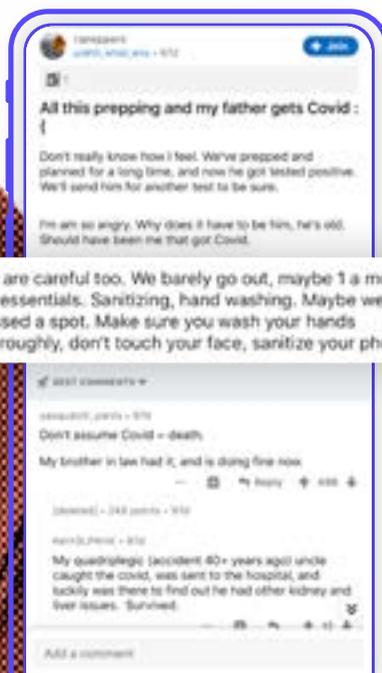
2.1 THE IMPORTANCE OF DECONTAMINATION LOCK



While consumers are pretty tight on hygiene outside, they also want to protect their homes at all costs and want to control the borders so that the virus does not get in. They believe the first risk-bearing agents are themselves. Home is the place where they feel safer, they want to keep it as clean as possible and defend the territory from any sort of germs that could jeopardize hygiene.

While consumers would focus on their hands' hygiene outside, the entry into the house is the occasion to add a layer of safety measures. In an attempt to protect themselves and their interior, they not only pay attention to the cleanliness of their hands but they also get rid of their outside clothes and sanitize all the items they bring inside their homes.

Social media examples



2.11 A DECONTAMINATION SPACE IN THE HOME ENTRANCE

During the lockdown, the house entrance played the role of a decontamination lock where consumers keep all necessary cleaning items to clean themselves or at the disposal of visitors. In china, people would set a defection area in their house entrance, where they would put some disinfection products to clean themselves after coming back from the outside. Their masks are also carefully placed in small-size plastic bag to be thrown away.

Social media examples

POST TRANSLATION:

"Three more pimples! I insist on going home to disinfect my feet and wipe my phone and earrings with alcohol."



Report Comment Likes



POST TRANSLATION:

"The right side of our house is now a place for disinfection and protection equipment- disposable shoe covers and wet tissues..."



EXAMPLES OF CLEANING ITEMS SET IN A BAG IN THE ENTRANCE OF A CHINESE HOME.

Chinese people would then either use wipes to clean small belongings such as bags, keys, cards, electronic devices (phones and earphones) or the door handle. As for bigger items such as delivery boxes, plastic bags, soles or clothes with delicate material, they would prefer to use alcohol based sprays.

INNOVATION SIGNAL

Design decontamination lock specific products (e.g. hand sanitizer that can be fixed on door entrance).

2.12 THE IMPORTANCE OF HAND WASHING

EVOLUTION OF THE CONVERSATION REGARDING HAND WASHING
OVER THE PAST YEAR IN UK AND THE US



EVOLUTION OF THE CONVERSATION REGARDING HAND WASHING
OVER THE PAST YEAR IN CHINA



2.12 THE IMPORTANCE OF HAND WASHING

continued

Washing their hands is not anymore something they only do after using the toilets or before eating, it is one of the things they do the most during the day and it's the first thing they do when they arrive home. They express the fact that they need to wash their hands constantly to avoid catching the virus from contaminated surfaces as it can transfer onto their hands. They talk about the frequency of the gesture, not so much about its effectiveness or the amount of product used.

Consumers use soap at home to wash their hands, as a first step before doing or touching anything. Its immediacy makes it a serious ally to "kill" germs and the virus in the eyes of consumers. Indeed, they often use the term "as soon as". They express a sense of urgent need, a feeling of stress towards

washing their hands. Yet, even if they regularly wash their hands, consumers also use hand sanitizers when they are at home - which shows how much the use of these products is now totally integrated as a hygiene reflex.

Handwashing has taken a social dimension: everyone should be aware of the importance of hand washing. Users share online their routines in order to influence their audience to do the same. Some of them point out that they wash their hands so much that they



Social media examples



become very dry, due to excessive washing and hydro alcoholic solutions. Some consumers suffering from psoriasis or sensitive skin use “soap substitutes” as a new solution to wash their hands without harming them.

Chinese consumers prefer soap with special properties such as antibacterial soaps. Note that foam soaps are well appreciated for their practicality and the facility to rinse it.

Chinese customers strictly abide by the washing time requirements (>the 20s) and 7-steps washing method, a professional hand washing guide provided by the government.



(7 STEPS HAND WASHING GUIDE)

POST TRANSLATION:

"I didn't like to wash my hands with hand sanitizer before, but because of the epidemic, I started to use hand sanitizer, follow the seven-step handwashing method, and wash hands carefully..."



INNOVATION SIGNAL

- Long-lasting hand sanitation (perhaps a product that leaves hands lightly coated with a skin friendly detergent?)
- Propose products dedicated to regular hand washing, both super efficient and respectful for the skin

2.13

CLOTHES SEEN AS THE SECOND MOST IMPORTANT GERMS-CARRIERS

Still in the decontamination process, people feel that hands are not the only thing that needs to be cleaned as soon as they enter the house, they also give great importance to the cleanliness of their clothes.

In China, people retrieve their clothes, put them on their balcony or use special clothes disinfectant sprays. The use of a high-temperature steam iron is also common and practical sterilization method.

INNOVATION SIGNAL

Develop sanitizing laundry detergent, harmless for clothes

2.14

PREOCCUPATIONS AND CLEANING PROCESS REGARDING FOOD AND PACKAGING

The idea of exposing their environment to the virus is a source of anxiety to consumers, which is why they started cleaning or throwing away food packaging as they believe people can spread the virus to each other through them. It has become a frequent practice among households. When it comes to food like fruits and vegetables, people usually wash them with soapy water or clean them naturally with baking soda and vinegar. Some people also mention the vegan and eco-friendly cleaning products. Fruit and Veg cloth.



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Social media examples

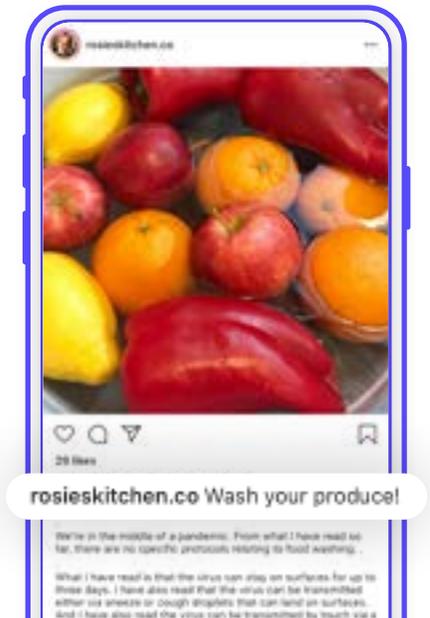


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Social media examples



2.2 BEYOND CLEANING: DEEP CLEANING AND DECLUTTERING

For a part of the consumers, the pandemic has resulted in a change of behaviour with regards to cleaning with sometimes extreme actions. Those changes have been motivated by:

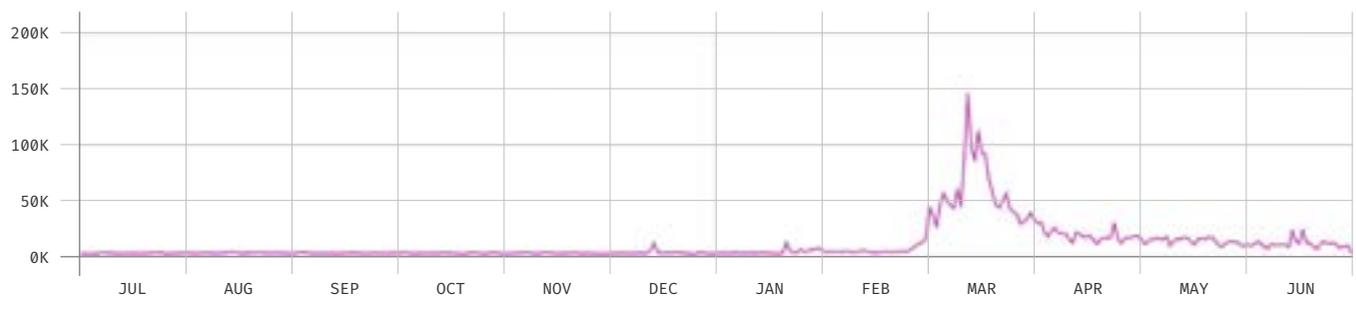
- On the functional level: home hygiene to fight the virus
- On the emotional level: mental hygiene
- Take over control, in a context marked with uncertainty

Social media examples

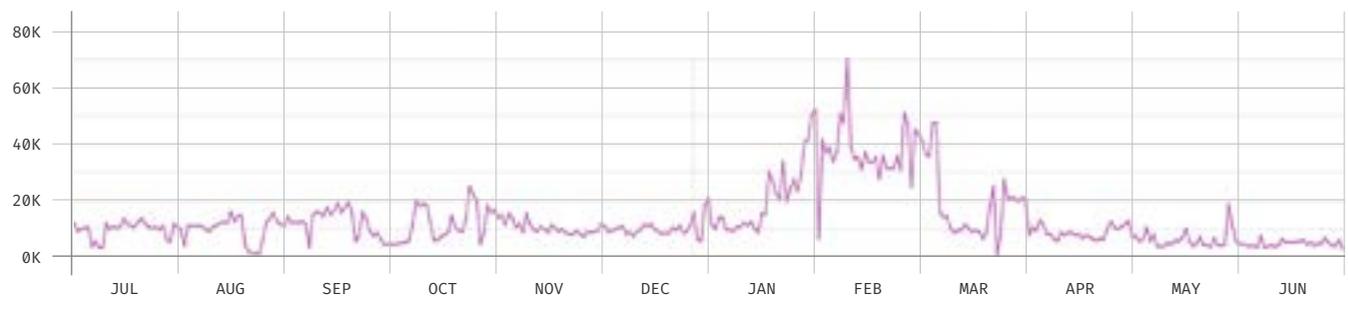


2.21 DEEP CLEANING

EVOLUTION OF THE CONVERSATIONS REGARDING DEEP CLEANING (SANITATION, DISINFECTION, DECONTAMINATION) OVER THE PAST YEAR IN THE UK AND THE US



EVOLUTION OF THE CONVERSATIONS REGARDING DEEP CLEANING (SANITATION, DISINFECTION, DECONTAMINATION) OVER THE PAST YEAR IN CHINA



Both timelines show that the topic of disinfection/ sanitation wasn't conversational (on the English web) or poorly conversational (on the Chinese web) before the pandemic. The pandemic has triggered new needs and habits in terms of deep cleaning and the necessity to erase all germs.

2.2.1 DEEP CLEANING

continued

With the constant fear of contamination, staying in their clean and comfortable houses give consumers a sense of safety and protection. Some consumers have become ultra maniac and noticed a drastic change in their relationship to cleaning and tidying their house. They want to do deep cleaning every day or several times a week. They acknowledge this behaviour is directly related to the Covid-19. This type of cleaning is different from the casual one, when they deep clean, consumers clean surfaces that they usually never touch and that they can't see: behind fridges, behind the oven, between furniture to clean around...

Indeed, during lockdown consumers now have the time to do deep clean. To fight an uncomfortable feeling of idleness, cleaning is one of the activities that brings instant results. Not only does it keep them active, it also brings them joy, relief - it is a way to clear their head from the stress and anxiety they get from lockdown and the sanitary situation.

Products they look for need to be reassuring on efficiency. However, for moms, they need to be natural and child-safe products as it makes them feel safer to not use chemicals so frequently in

their house as they are around more often. In this regard, some use vinegar, lemon and baking soda.

As for Chinese consumers' practice, they will have a tendency to use products with disinfectant characteristics, even if they are more expensive, instead of basic cleaning products. For example, the sterilizing laundry detergent has been added into the daily washing routine of many customers as an extra step.

Chinese consumers trust new technologies despite the high price of automated solutions. They like the comfort of using such products but also their great efficiency. Disinfection is a priority and consumers will buy whatever product will help them with the disinfection process.

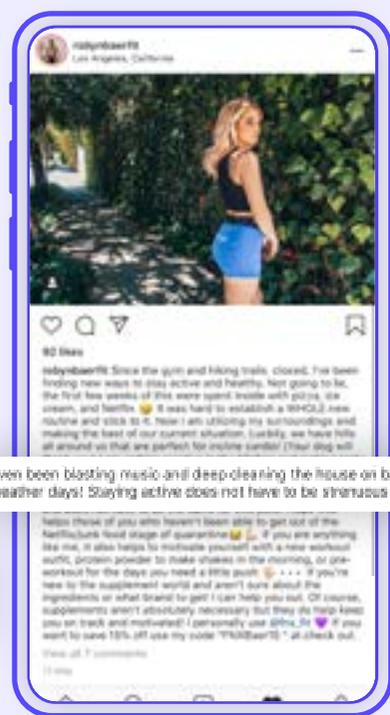
INNOVATION SIGNAL

Accompany consumers by communicating on turnkey cleaning protocols, or with turnkey cleaning kitsharmless for clothes.

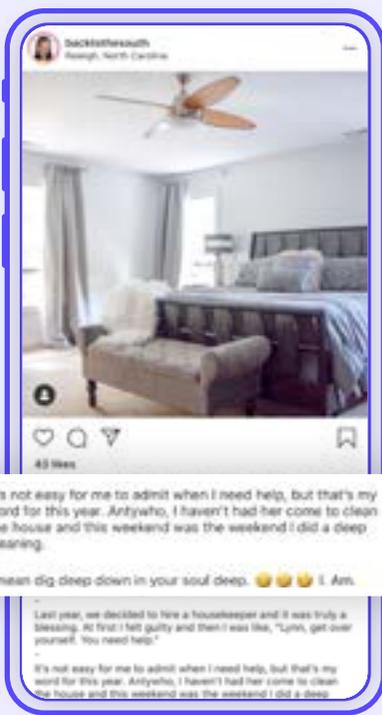
Social media examples



The things that drove me crazy to do growing up, make me happy now. Who knew that deep cleaning my house, vacuuming to see the lines in the carpet, making our bed, opening the windows to hear the birds chirping, lighting candles, and taking walks at night - truly brings me so much joy. I've realized I'm turning into my mom more and more as each day passes.



even been blasting music and deep cleaning the house on bad-weather days! Staying active does not have to be strenuous



It's not easy for me to admit when I need help, but that's my word for this year. Anywho, I haven't had her come to clean the house and this weekend was the weekend I did a deep cleaning.

I mean dig deep down in your soul deep. 🙏🙏🙏 I Am.



more proud of myself!! So while today was supposed to be my recovery day/off day- I ended up doing deep cleaning of the entire house along with spin ropping! It felt like another workout that lasted for over 2 hours. Deep inside I am happy to



Customer Experience Review 🌟🌟🌟🌟🌟 "Wonderful - I love diffusing this blend on Saturday mornings when I am deep cleaning my house. It makes everything feel so much cleaner! I also use it in a spray bottle to mist over things during the week to keep that clean feel going all week long. LOVE the smell too!" - Lua

2.2.2 DECLUTTERING

If deep cleaning several times a week can be considered a drastic behavior, some consumers have decided to go even further and practice decluttering.

Decluttering doesn't only have a de-stressing effect, it is also a way to take care of oneself, take full control of what is going on in its life and stay calm. It helps people who declutter feeling more confident, and lighten their mental and gain peace of mind. Decluttering is a therapy for a lot of consumers during this quarantine as they realize they don't need to own so many things. Decluttering is supposed to come before an efficient deep cleaning!

The lockdown has been the opportunity for consumers to take the time to clean the different rooms in their house, some of them they never cleaned before. Cleaning brings them a sense of organization. People feel better when their house is organized and fully cleaned and tidied. More than a cleaning practice, decluttering is a psychological relief to the eyes of consumers who adopted it.

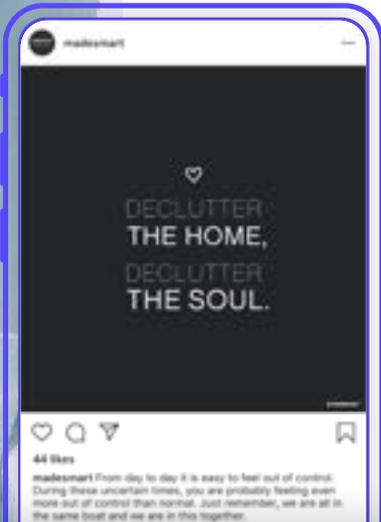
Some consumers even compare themselves to Marie Kondo for finding peace in decluttering.

INNOVATION SIGNAL

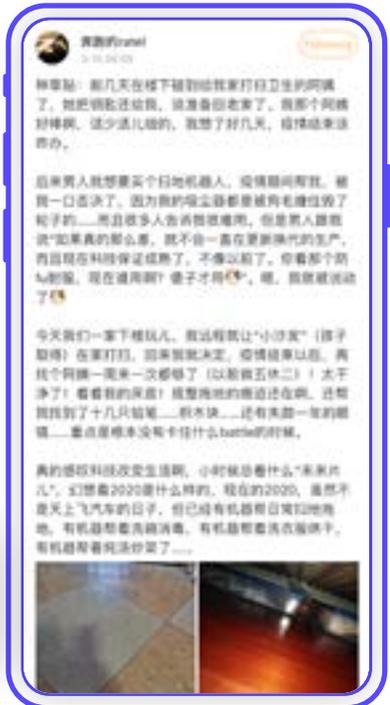
Build partnerships with organizing consultants or influencers



Social media examples



We are here to inspire you to focus on the silver lining of the quarantine situation and to empower you to take back the spaces in your home that deserve some organizational TLC. Cleaning and organizing is a productive way to spend your time at home, not just for the reasons you can see, but for what you feel when you have an organized space. Completing the smallest project can bring an incredible sense of accomplishment as well as peace of mind.



I don't know about y'all, but man oh man does each day of #selfquarantine get harder and harder. But my house is finally looking like a normal house. I've been cleaning, organizing, and decluttering like no one's business. I am Marie Kondo-ing up a storm (do people even do that anymore???) And I have started ration my snacks because homeboy went HAM the first

2.3 HYGIENE IN THE VARIOUS ROOMS OF THE HOME

Consumers state that the time they spend cleaning their house has significantly increased during the lockdown because they have more time at their disposal and also because the more time they spend at home, the dirtier their house becomes.

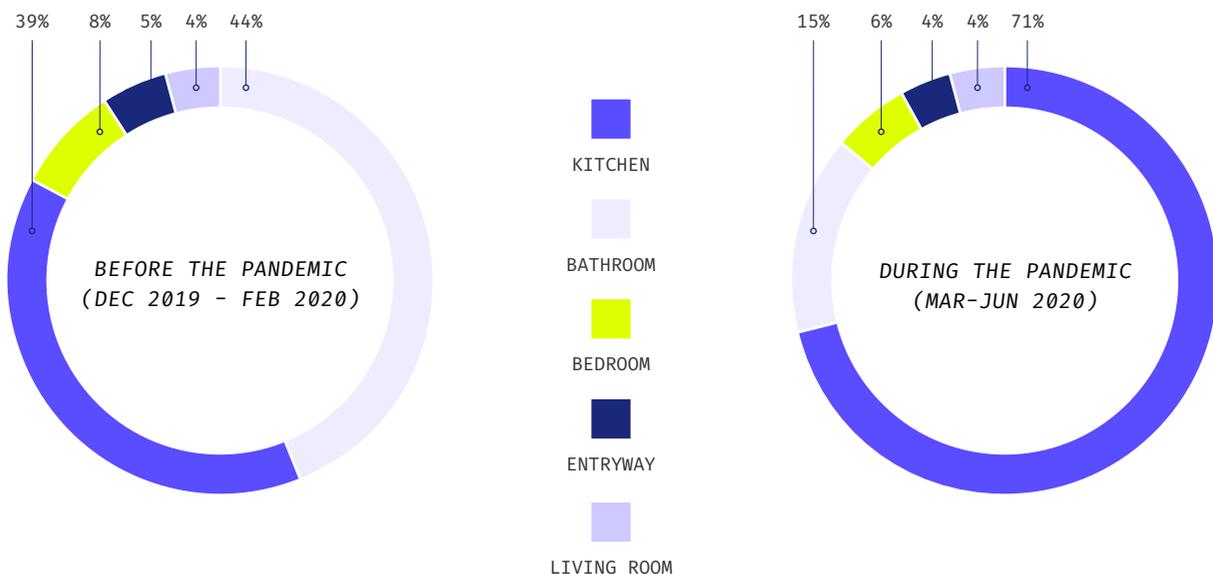
The kitchen and bathroom remained the most mentioned rooms pre and post pandemic however the kitchen SOV increased

significantly which confirms the cooking trend during the lockdown.

Most of the publications are factual, people do not give particular reason to the fact they cleaned this or that room.

A few people state that they are cleaning their living room or their bedroom because it is also their temporary workplace.

MOST MENTIONED ROOMS WITH REGARDS TO CLEANING IN THE UK AND THE US



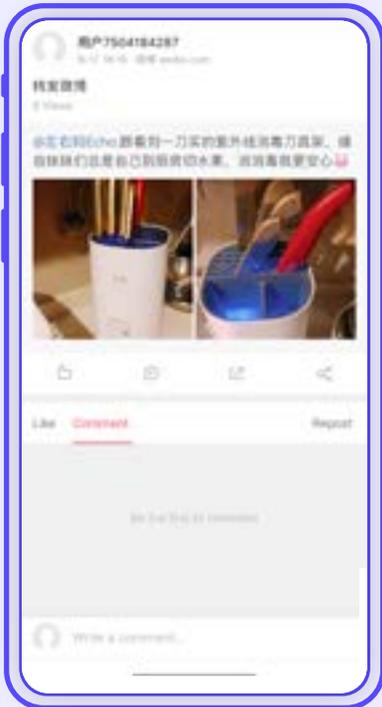
Social media examples



2.3 HYGIENE IN THE VARIOUS ROOMS OF THE HOME

continued

Social media examples



On the Chinese web, the entryway seems to be the room they cleaned the most because it is the first room confronted by germs (see upper in this deck, about the decontamination locks).

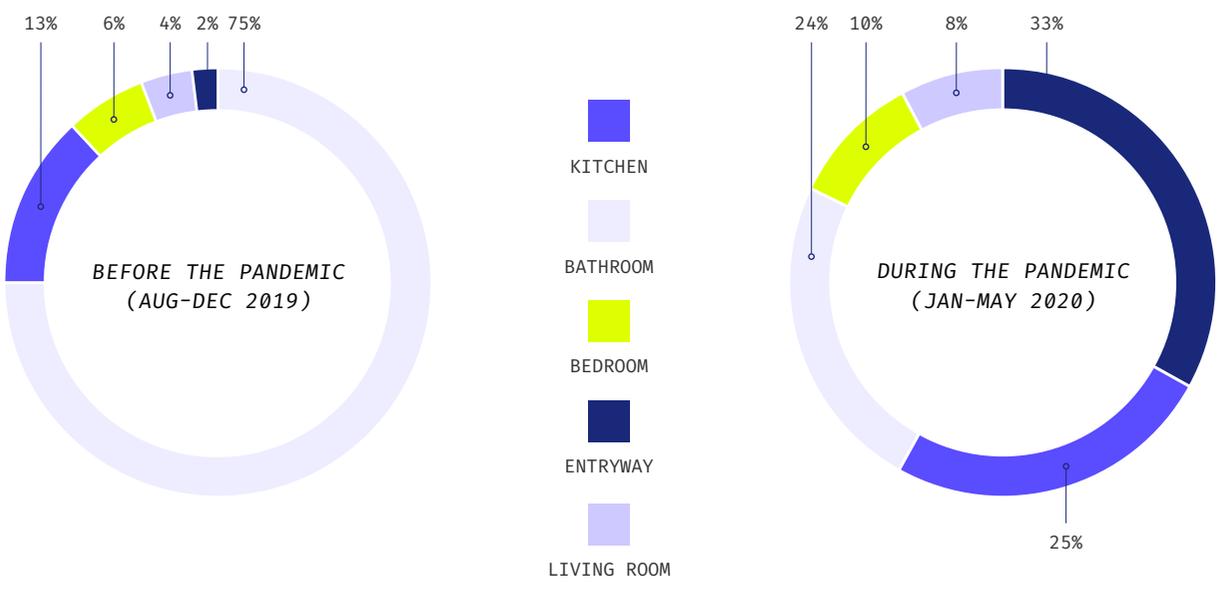
Chinese kitchens have also been more frequented during the lockdown. Because Chinese consumers are used to cooking with high temperature oil, they search for efficient products to get rid of the generated smokes. They are ready to put the price in expensive products from famous Japanese brands such as KAO or Kobayashi.

Moreover, new disinfectant devices have been added to Chinese kitchens during the lockdown.

Once again, Chinese consumers are inclined to trust the disinfectant power of UV light. They tend to have more trust in the efficiency of automated solutions than their own hands and also mention that, in a post-pandemic state, disinfectant devices have become essential in all kitchen.

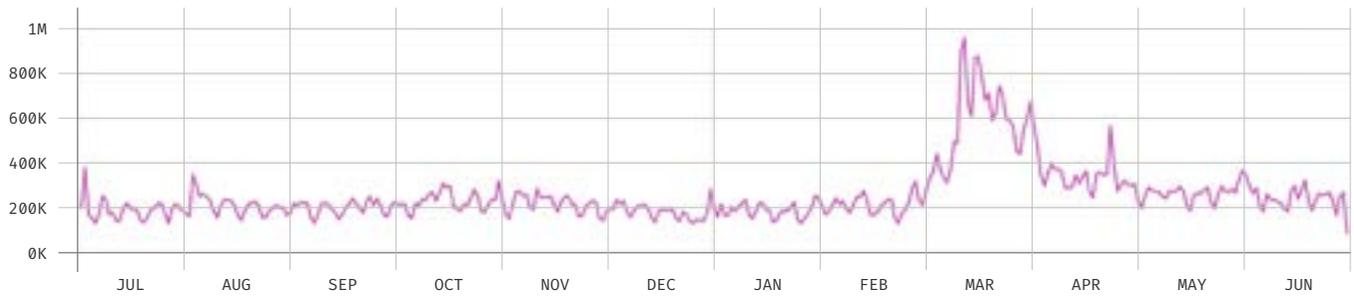
Finally, the significant SOV for Chinese bathrooms can be explained by the necessity to clean thoroughly a room that is directly linked to hygiene. Also, people are talking about shared bathrooms and the necessity to keep them clean if they are used by various people not living together.

MOST MENTIONED ROOMS WITH REGARDS TO CLEANING IN CHINA

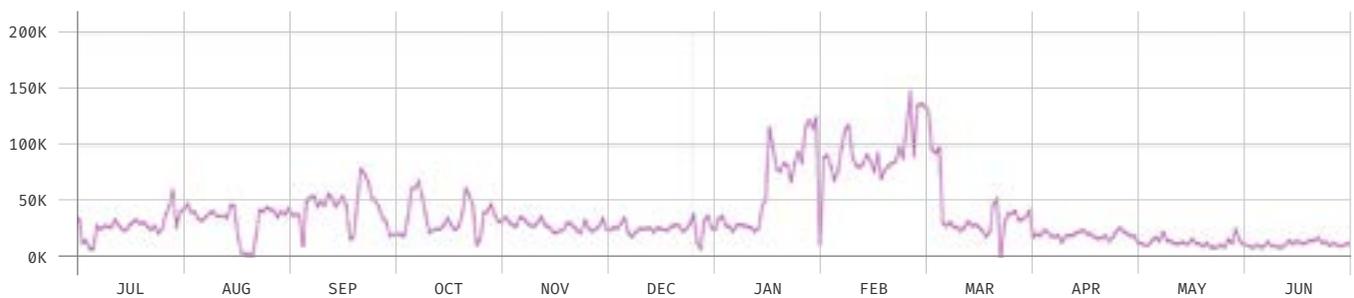


THE NEW NORMA

EVOLUTION OF HYGIENE CONVERSATIONS OVER THE PAST YEAR IN THE UK AND THE US



EVOLUTION OF HYGIENE CONVERSATIONS OVER THE PAST HALF YEAR IN THE CHINA



The sharp increase of conversations and the rise of concerns that are seen on those two curves during lockdowns show us that those countries, as the rest of the world, were unprepared to face the Covid threat. And the progressive decrease following the pandemic might be interpreted as the fact that they are now more pandemic-ready.

SHARE OF VOICE OF THE CONVERSATIONS REGARDING A SECOND WAVE WITHIN THE TOPICS 'HYGIENE OUTSIDE' AND 'HYGIENE AT HOME' BETWEEN MARCH AND JUNE IN THE US AND THE UK



The share of voice of conversations mentioning a second wave is, as of now, very low on the US and UK scopes (0.2% of the total volume). Mentions are more linked to hygiene measures outside, however the topic of hygiene at home is not out of the debate.

The mentions are mostly talking about the possibility of a potential second wave, what would cause it (26% of the mentions draw a link between the BLM protests and a potential second wave) and reiterate the safety measures.

The outbreak has created a burst of interest in terms of hygiene and vigilance is going to be the new normal. Users “have learned to expect the unexpected”.

Social media example



cassiehepler Art modeling was a nice break from the monotony @blundquistart class in North Scottsdale this week! All the artists wore face masks and we socially distanced like champs. It's a small group in a warehouse like space so that helped put our minds at ease as well. This oil painting was one

quite impressive!! As we move into this second wave of Covid cases with a huge wave in Arizona, please be cautious like you were during the first wave. Wear face masks, use hand sanitizer and keep socially distancing! My fabulous fashion fun with @velocitystylebar was rescheduled today because people

3.0

BODYCARE UNDER COVID

The Covid e perception is no excep for such a social int people's b hygiene an

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long time, having no or very few
interaction has drastically changed
behaviours in terms of personal
and beauty habits.

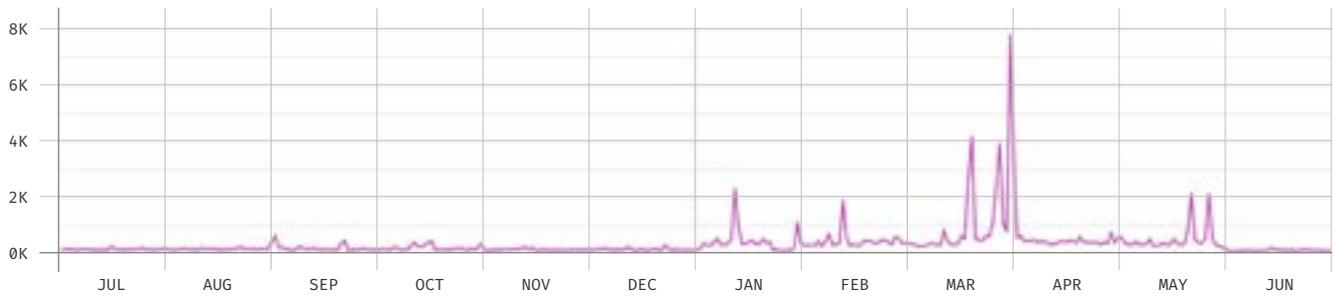
that people stopped taking care
lives altogether but the context
the occasion for them to experiment
behaviours and they sometimes felt
to quit beauty practices that
used to doing pre-pandemic.

action, we will study what beauty
changed, what are the reasons
these changes in behaviour and will
changes last in time or are we to
comeback to beauty practices as
known before the pandemic.

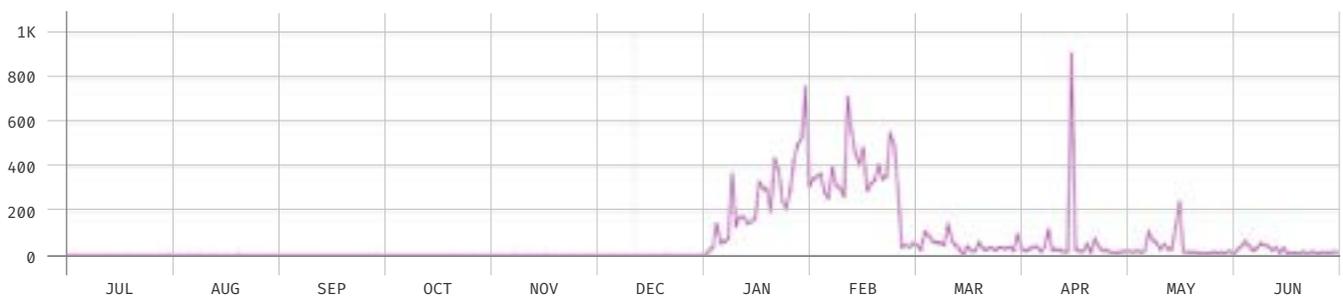


3.1 NO MAKEUP

EVOLUTION OF THE CONVERSATIONS REGARDING THE MAKEUP-FREE TREND
OVER THE LAST YEAR IN THE UK AND THE US

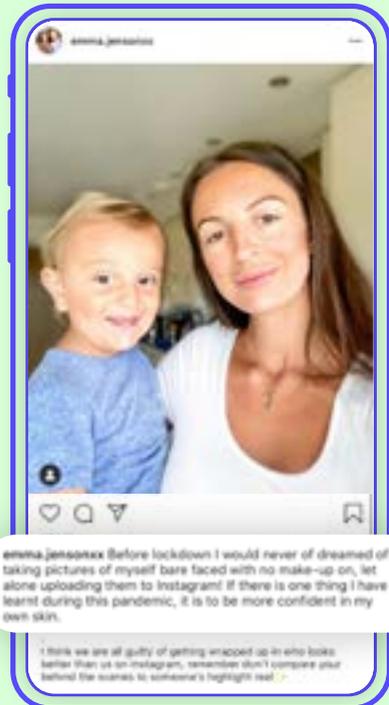
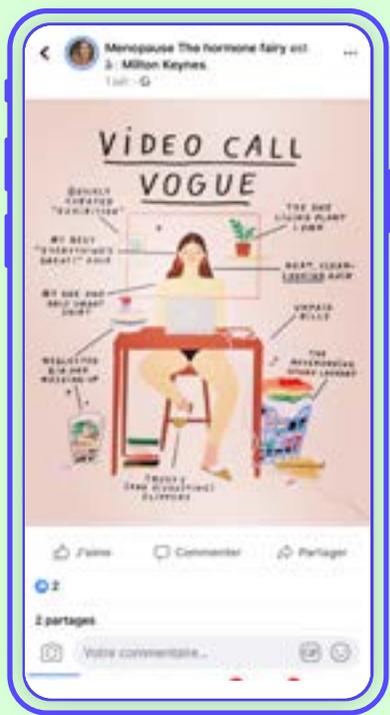


EVOLUTION OF THE CONVERSATIONS REGARDING THE MAKEUP-FREE TREND
OVER THE LAST YEAR IN THE CHINA



In the UK and US, peaks of conversations are seen between March and April. In China, the controversial period is between January and March, however, it tends to have subsequent impacts after.

Social media examples



On the English web, the no-makeup trend is associated with a sentiment of pride (notably when they assume their make-up free face during work video calls) and accomplishment in most of the publications. Women say they learned to be more confident in their own skin. They even mention having difficulty to resume their old make-up habit and have fully embraced this no-makeup period.

Wearing no make-up is also associated with a return to basics and natural beauty. Women encourage each other to own their body the way it is in its natural state.

Finally women state their skin looks much better without daily makeup and pollution from outside.



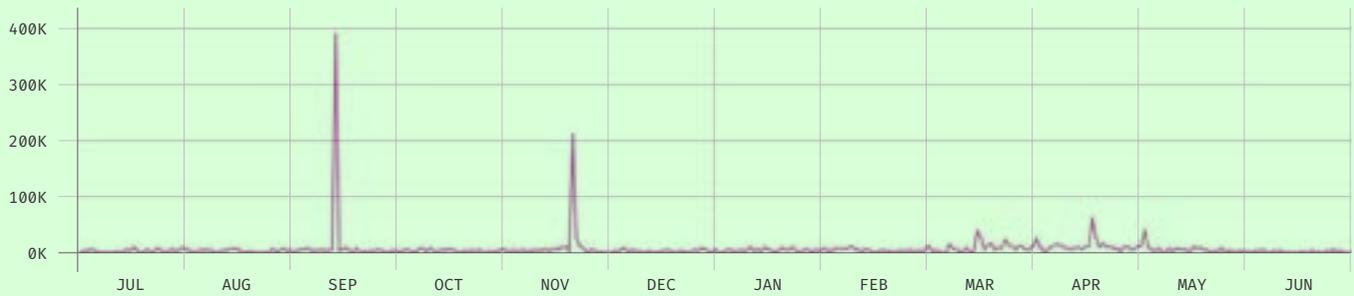
In China, makeup also became less necessary during the lockdown following the absence of social interactions.

Note that for Chinese women, the fact that they wear a mask that covers half of their face when going out is also a reason to stop wearing makeup.

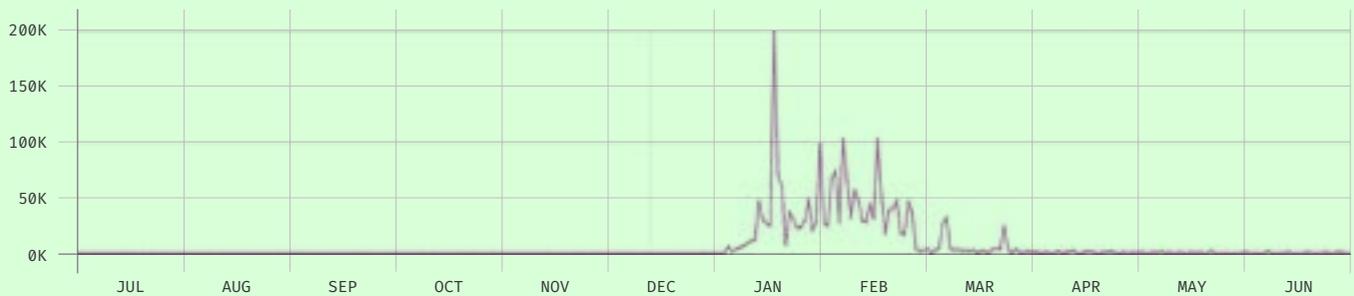
Finally Chinese women also appreciate the state of their skin when they wear less makeup.

3.2 NO HAIR WASHING

EVOLUTION OF THE CONVERSATIONS REGARDING THE ABSENCE OF HAIR WASHING OVER THE PAST YEAR IN THE UK AND THE US



EVOLUTION OF THE CONVERSATIONS REGARDING THE ABSENCE OF HAIR WASHING OVER THE PAST YEAR IN CHINA



Except from two isolated peaks in September and November (corresponding to forum conversations), we can see that the topic was more conversational between March and May.

Peaks of discussion focus on the lockdown period, from January to March.

For the most part, people, mostly women, just state that they haven't washed their hair in x days when they describe their day or describe their state of mind.

The reasons given are laziness, absence of social interactions or taking the time to train their hair out of daily washes.

Some of them explain that space out shampoo makes their hair look better and less greasy in the long term. The lockdown is the ideal occasion for some women to start space out washes and they ask for advice.

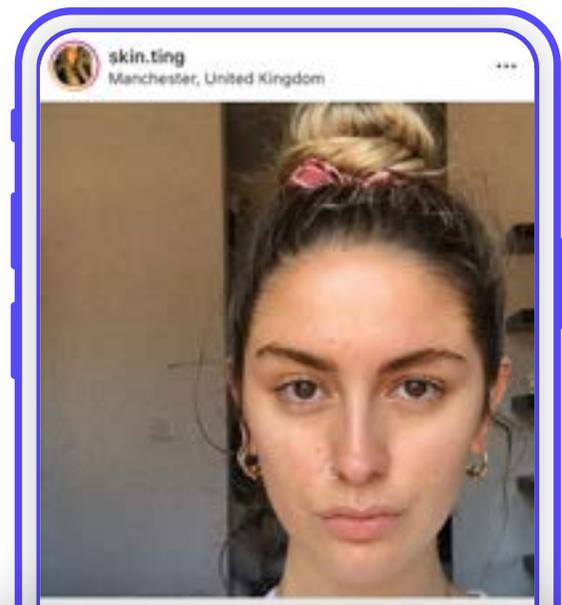
The link is made between mood and clean hair is made on several occasions. Women state that while it is not a big problem, the fact that they don't look at their best is weighing on their mood.

Note isolated comments talking about hygiene. They think that spacing out shampoo should not apply to people going out because of the Covid.

On the Chinese web, the absence of social interactions has also resulted in people washing their hair less. Chinese people usually consider that hair-washing is a vital step for social activities. Note that in China, a widespread joke says "if I washed my hair before meeting you, it means you are important to me".

Also, the link between spacing out shampoo and healthier hair is also mentioned. Chinese netizens report that reducing the frequency of hair washing could effectively prevent hair loss.

Social media example



skin.ting It me 🙄 No posing or angles, just me and my texture, pores and scarring 🙄 and greasy hair, because washing my hair in lockdown is a chore I can go without 🙄

go without 🙄

View all 54 comments

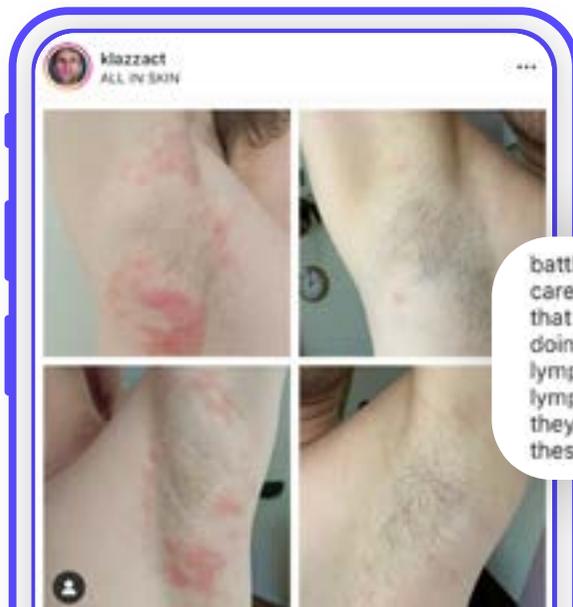
3.3 NO DEODORANT

People have decided to enjoy this sort of break in their life to leave their body alone. They think it is the best occasion to start a deodorant cleansing.

The deodorant cleansing is usually in two steps:

- ➔ Consumers stop wearing deodorant to get their body out of this habit (they know that the more you put on the more you need) and free it from toxic compounds that might reside in their skin
- ➔ They either keep their deodorant-free routine or they start using natural deodorant.

Social media example



Consumers' motivation for starting a deodorant cleansing are varied:

- ➔ Health concerns: People want to stop the rashes, dry skin and irritation they get from deodorants. They usually complain about the aluminium contained in deodorant as it is a source of cancer to their eyes. After not using deodorant for a few weeks they start realizing that their skin feels smoother, better and that they don't smell anymore.
- ➔ More naturality: People want to return to basics and live in a more simple and natural way. Getting rid of their deodorant is a way for them to re-discover their natural scent.
- ➔ Absence of social interactions: People are not as much concerned by body odor.
- ➔ Economical reasons: People want to save money. They find that they are able to save a lot of money that they usually spent on beauty items.

3.4 NO SHAVING

The topic of no-shaving is essentially discussed by women.

We note that the no-shaving trend is more linked to practicality, the absence of social interaction or the impossibility to go to a beautician than to specific claims or a protest movement.

Some women mention that it is a personal choice not a statement.

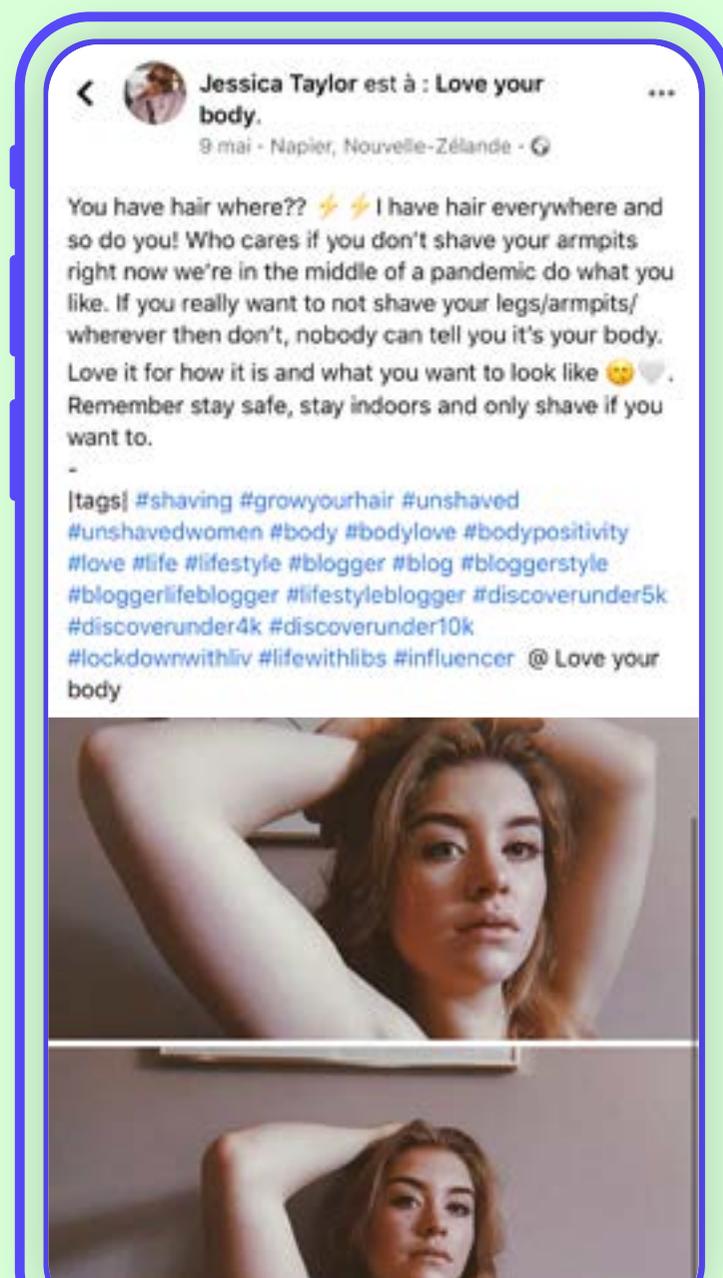
We can see clear differences in women and men speeches.

The feelings women get from not-shaving are mixed. They are happy because it's one task less, however they do not always feel better or don't feel brave enough to go out like that.

Women also discuss social conventions and the taboo surrounding female hairiness, which they find is entertained by advertisement. They talk about the pressure put by society and the fact that it is socially acceptable for men not to shave, but it is not for women.

As for men, the no-shaving trend is more the occasion to make jokes or to laugh about the state of their beard.

Social media example



CHINESE SP

3.5 INTENSIVE SKINCARE AND BODY CARE

Although many customers abandon their makeup routines, it does not apply to skincare and body care. Skincare and body care are considered long-term investments by Chinese consumers and are not as strongly associated with social interactions. The lockdown gives Chinese customers more time to follow their whole set of skincare rituals, including a cleaning mask, a multi-radio-frequency skin device, a jade roller, a body exfoliator, and some essential oils. Plenty of customers also mentioned that this kind of care routine during lockdown is self-soothing and improves their mood.



SPECIFICITIES

3.6

MOVE TO A SAFER SKIN AND BODY CARE REGIME

Considering extensive hand washing has become Chinese customers' daily routine, skin problems, such as roughness, dryness, and irritation, become serious concerns.

So Chinese customers are looking for moisturizers that can soften and cure irritations. They also have a preference for products, made out of immunity-boosting, safe and organic ingredients.

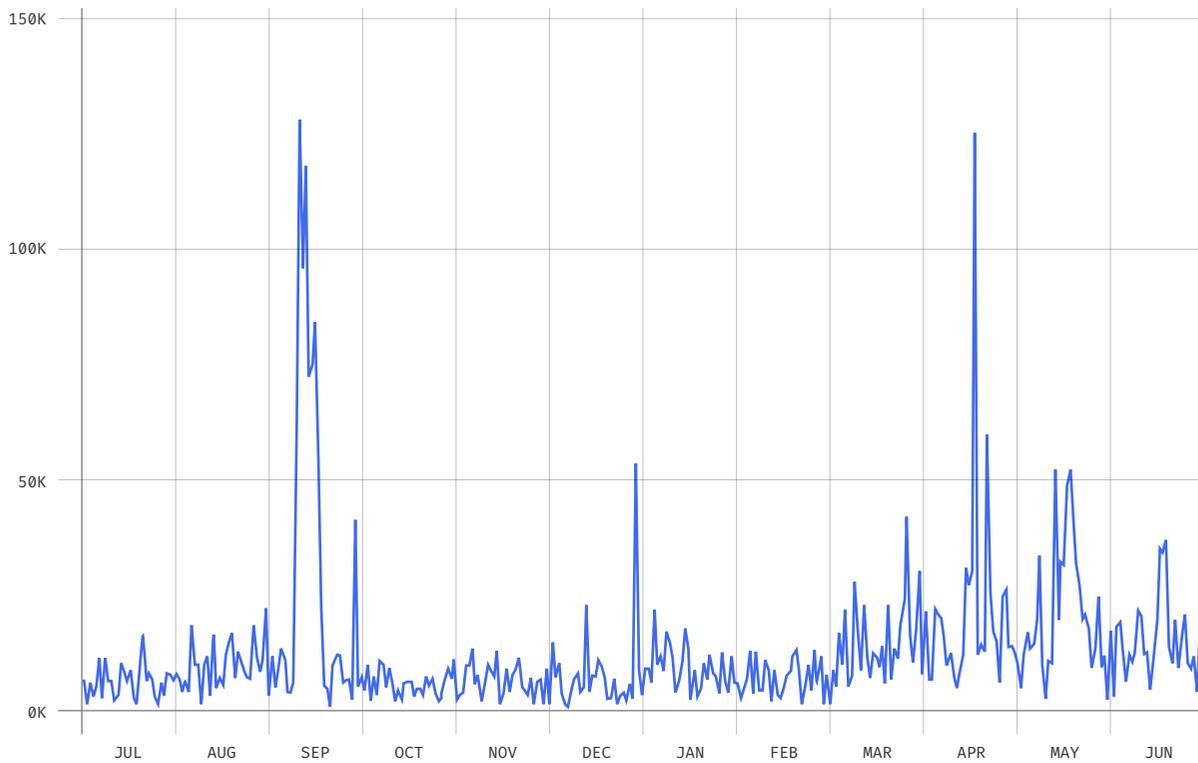
4.0

SUBSCRIPTION BOXES

The subscription box model has been a huge success but also proved to be temperamental, with few subscription businesses being able to scale and capture long-term recurring revenues. Some notable examples include Blue Apron, Harry's Shave Club, BirchBox, and IPSY, with the most successful fee model hovering around USD \$10 or less, a precedent shaped by media-on-demand subscriptions like Netflix and Spotify.

As discussed earlier, as hygiene demand evolves from value and functionality-oriented needs to emotional and lifestyle needs, and as products become a stricter part of consumer's routines, the potential for providing novelty and replenishment via subscription has also grown, creating opportunity for fast-moving businesses.

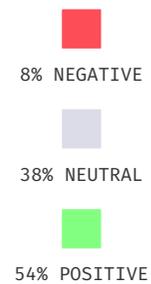
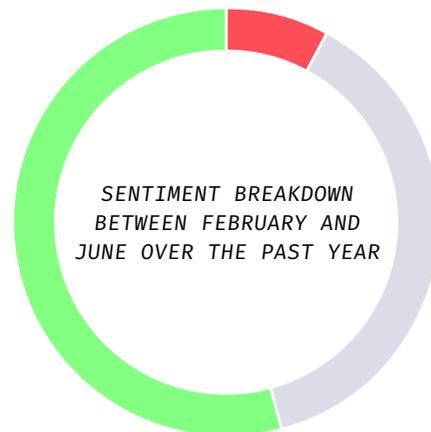
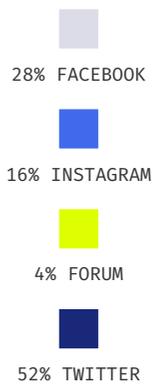
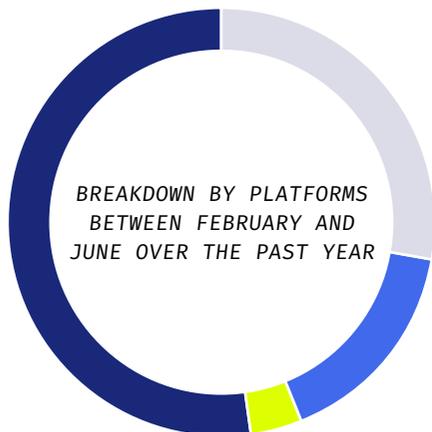
EVOLUTION OF THE CONVERSATIONS REGARDING SUBSCRIPTION BOXES
OVER THE PAST YEAR IN THE US



A small increase in the volume of posts can be seen between March and June 2020. The peak of publications in September corresponds to a giveaway contest for ThreeMain.

3.41K posts in the US between February and June 2020

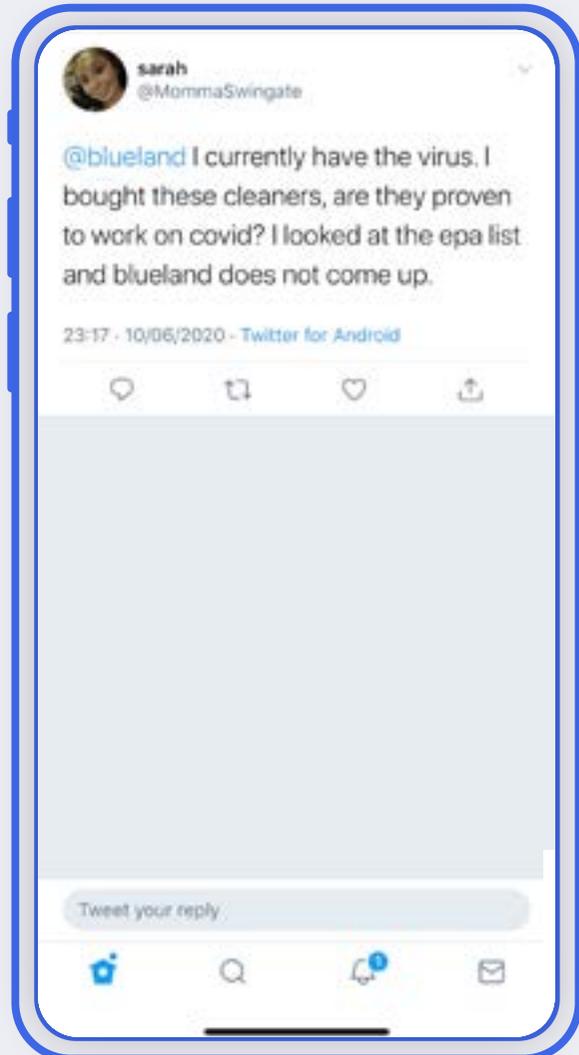
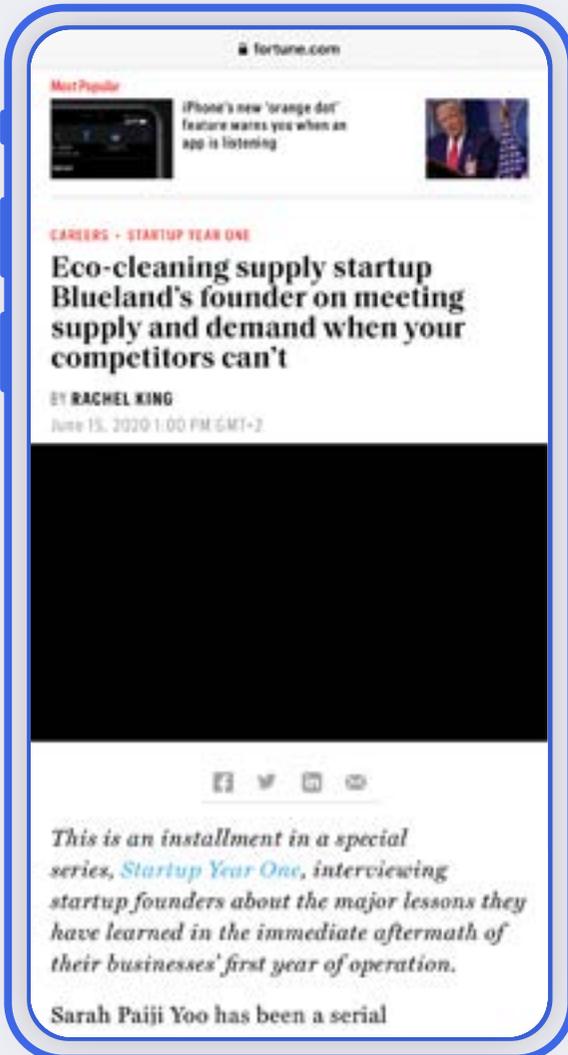
The global sentiment towards subscription boxes is very positive. However, the sentiment, positive and negative, is mainly product-related rather than linked to the box concept in itself.



Social media examples



Social media examples



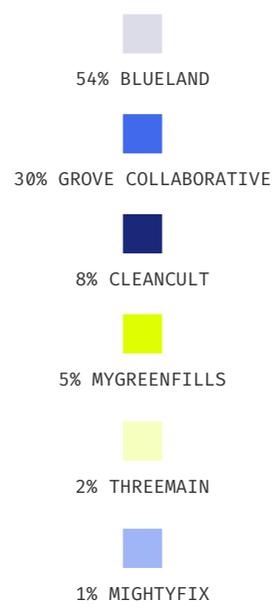
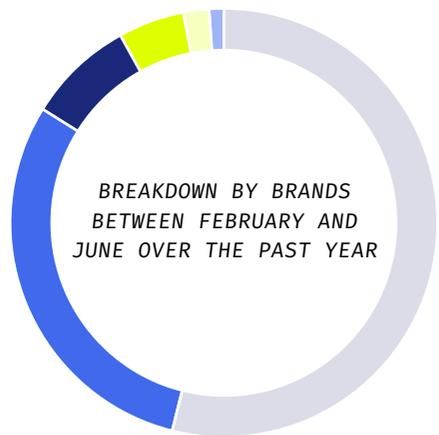
The link to the pandemic is rarely made among the publications (122 posts).

BLUELAND and **GROVE COLLABORATIVE** are the most mentioned brands with regards to the Covid. The publications are mostly product-related. People are happy that both brands provide products with clean composition and that are eco-friendly although the question remains regarding the efficiency of natural products against Covid.

Regarding **GROVE COLLABORATIVE**, some state that they've been reassured to know that natural soaps are as efficient as antibacterial or antiseptic soap to fight Covid. It comforts them with the idea to continue using their favorite brand.

Regarding **BLUELAND**, most of the publications share an article by Fortune magazine stating that "In the wake of COVID-19, eco-friendly cleaning supplies startup BlueLand has seen a huge increase in product sales".

We also find a few comments questioning the efficiency of the brand's products with regards to their natural composition. Users fear the products are not strong enough to work against Covid. They are looking for some sort of Covid proven label.



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To learn more about using social data for c
staying close to the voice of the consumer



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