

Apr.16, 2020

Hakuhodo Institute of Life and Living Shanghai conducts “Survey into Changes in *Sei-katsu-sha* Attitudes Due to COVID-19”

Forward-looking Chinese *Sei-katsu-sha*

- 74% Want to cherish their families more
- Score for Want to review the way I live (57.2) > Concerned about my future (35.8%),
Feel something is missing in my life (30.9%)
- Make more effort with cooking and menus (57.4%) > Use frozen food, etc. more (28.1%)
- Spend more time on my smartphone (70%) led to Read posts on social media more (51%)

Hakuhodo Institute of Life and Living Shanghai (HILL Shanghai) conducted a survey and other research into Chinese *sei-katsu-sha*'s¹ attitudes and behavior in the period February 24–March 4. We summarize the findings of this research, titled “Survey into Changes in *Sei-katsu-sha* Attitudes Due to COVID-19,” below.

China is gradually returning to normal since Wuhan, the capital of Hunan Province, came out of its 75-day lockdown on April 8.

HILL Shanghai, which has operated in Shanghai since 2012, conducted a questionnaire survey to find out how *sei-katsu-sha*'s lifestyles, attitudes and behavior changed from spending so long quarantined in their homes to prevent the spread of the virus. The following is a summary of the findings.

The survey painted a picture of indomitable Chinese *sei-katsu-sha* reviewing their and their families' lives in a positive way and moving forward, even while forced to live inconvenient lives under severe restrictions.

Changes in lifestyle attitudes and behavior

- As time at home increased, the top-scoring item was Want to cherish my family more (74%).
- Family was followed by health-related items Started eating a healthy diet (63%) and Started consciously exercising to stay healthy (62%).
- Positive responses like Started wanting to review the way I live (57.2%) came in ahead of negative responses such as Started feeling vaguely concerned about my future lifestyle (35.8%) and Started feeling something is missing in my life today (30.9%).

¹ *Sei-katsu-sha* are more than simply consumers, just as people's lives and lifestyles include more than just shopping. Hakuhodo introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers' lives.

Changes in consumption attitudes and behavior

- As the period people were unable to eat out dragged on, Started making more effort with cooking and menus at home (57.4%) came in higher than Opportunities to use frozen food, etc. increased (28.1%).
- The highest scoring items included Opportunities for indoor leisure activities increased over opportunities for outdoor leisure (63.4%), Opportunities to use online supermarkets increased (56.2%) and Opportunities to use e-commerce increased (54.6%), indicating the advent of new “indoor consumption.” Conversely, the score for Opportunities to order take-out using food delivery services increased was a low 31.7%.
- Respondents became cannier in their shopping behavior, as seen in the scores for Started wanting to spend as little as possible when shopping (49.2%), Make fewer impulse purchases (45.1%) and Started taking my time selecting products when shopping (41.1%).

Changes in attitudes and behavior related to information

- Some 69.7% of respondents said they Spend more time on my smartphone, and due to this, 50.8% reported that they Started reading posts from other people on social media more.
- In online/app service use, the top three changes were increased use of Short video services/apps (53.4%), Net shopping services/apps (51.5%) and O2O supermarket services/apps (50.5%).

The current report introduced changes in Chinese *sei-katsu-sha*'s attitudes and behavior as a result of COVID-19. HILL Shanghai will continue to monitor and analyze attitudinal and behavioral changes in Chinese *sei-katsu-sha* resulting from the novel coronavirus and share this information to support our clients' marketing activities in China.

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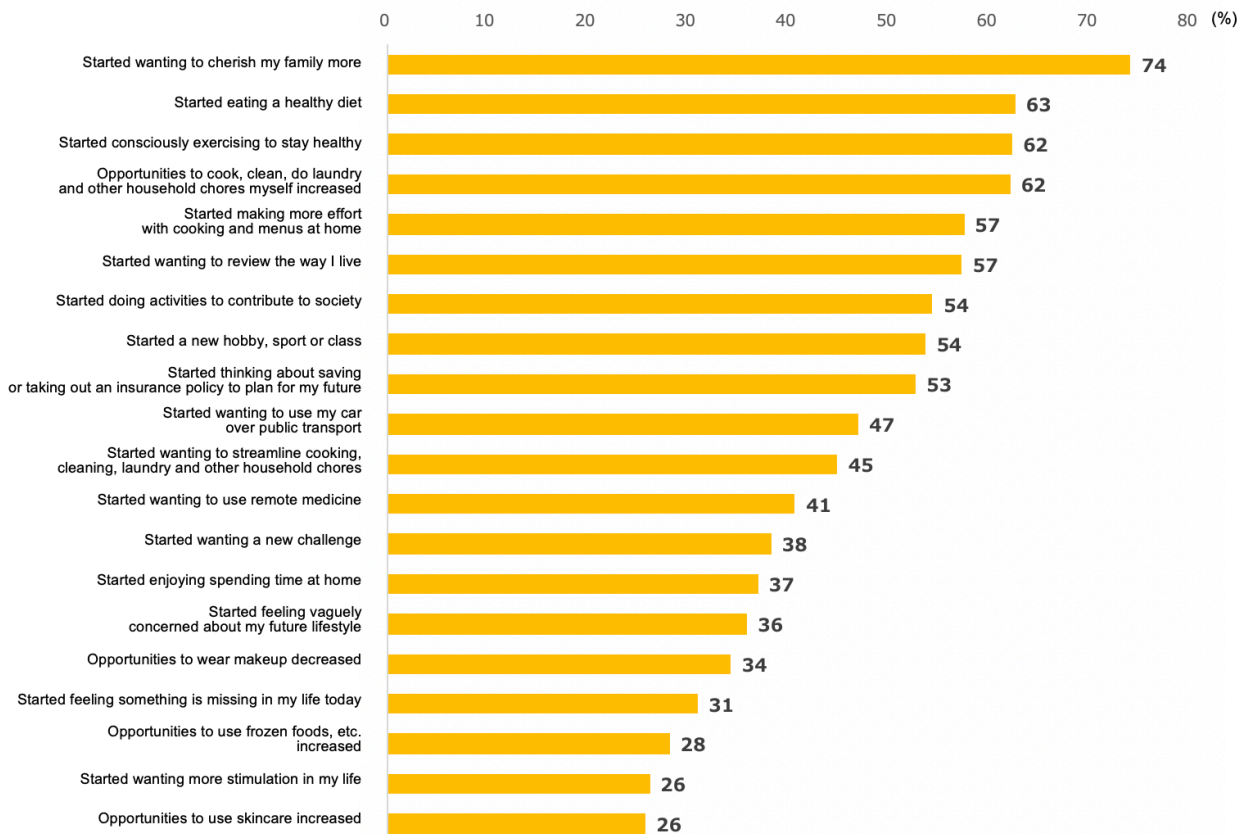
Reference data

● Changes in lifestyle attitudes and behavior: Data (1)

- The top response was Started wanting to cherish my family more (74%).
- Family was followed by the health-related items, Started eating a healthy diet (63%) and Started consciously exercising to stay healthy (62%).

Q: Are there any new habits and behaviors you started due to the effects of the novel coronavirus?

Select up to five items. (Free response)

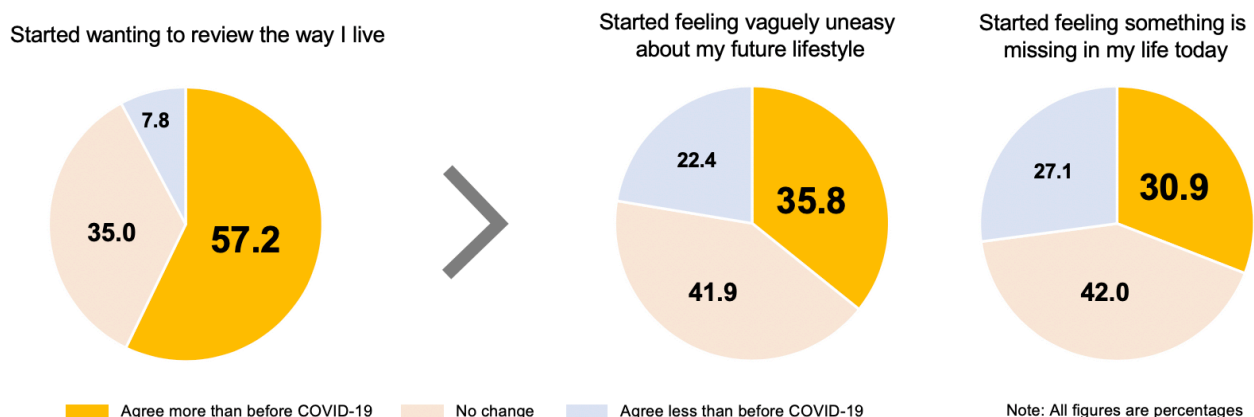


● Changes in lifestyle attitudes and behavior: Data (2)

Positive responses like Started wanting to review the way I live (57.2%) came in ahead of negative responses such as Started feeling vaguely concerned about my future lifestyle (35.8%) and Started feeling something is missing in my life today (30.9%).

Q: Do you feel that your lifestyle attitudes and behavior have changed since before COVID-19?

Select one response for each item that applies to you. (Single response)



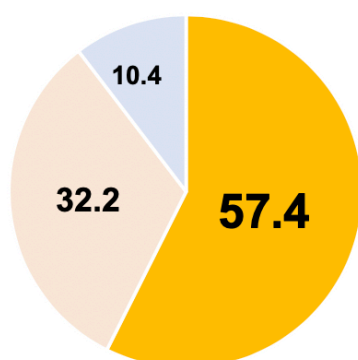
Changes in consumption attitudes and behavior: Data (1)

As the period respondents were unable to eat out dragged on, more reported they Started making more effort with cooking and menus at home (57.4%) than reported that Opportunities to use frozen foods, etc. increased (28.1%).

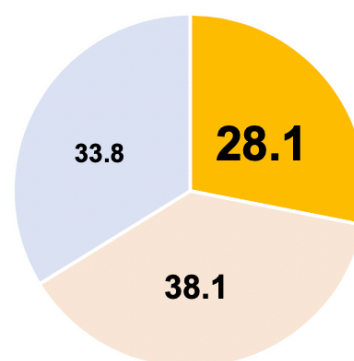
Q: Do you feel that your consumption attitudes and behavior have changed compared to before COVID 19?

Select one response for each item that applies to you. (Single response)

Started making more effort with cooking and menus at home



Opportunities to use frozen foods, etc. increased



Note: All figures are percentages

Agree more than before COVID-19 No change Agree less than before COVID-19

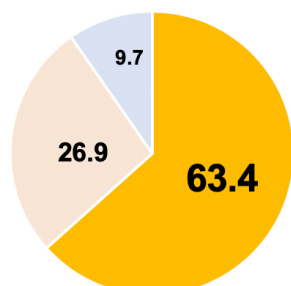
● Changes in consumption attitudes and behavior: Data (2)

The highest scoring items included Opportunities for indoor leisure increased over opportunities for outdoor leisure (63.4%), Opportunities to use online supermarkets increased (56.2%) and Opportunities to use e-commerce increased (54.6%), indicating the advent of new “indoor consumption.” Conversely, the score for Opportunities to order take-out using food delivery services increased was a low 31.7%

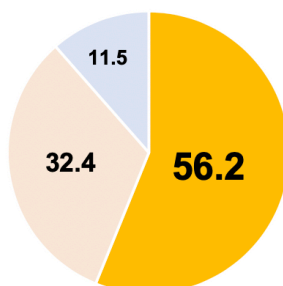
Q: Do you feel that your consumption attitudes and behavior have changed compared to before COVID-19?

Select one response for each item that applies to you. (Single response)

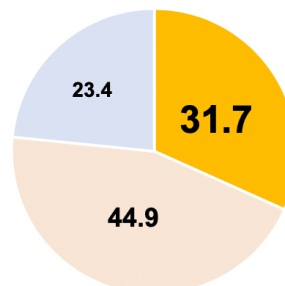
Opportunities for indoor leisure increased over opportunities for outdoor leisure



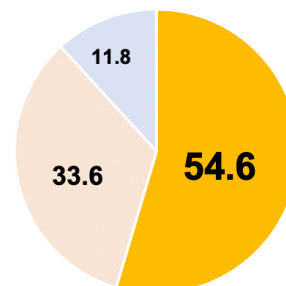
Opportunities to use online supermarkets increased



Opportunities to order take-out using food delivery services increased



Opportunities to use e-commerce increased



Agree more than before COVID-19 No change Agree less than before COVID-19

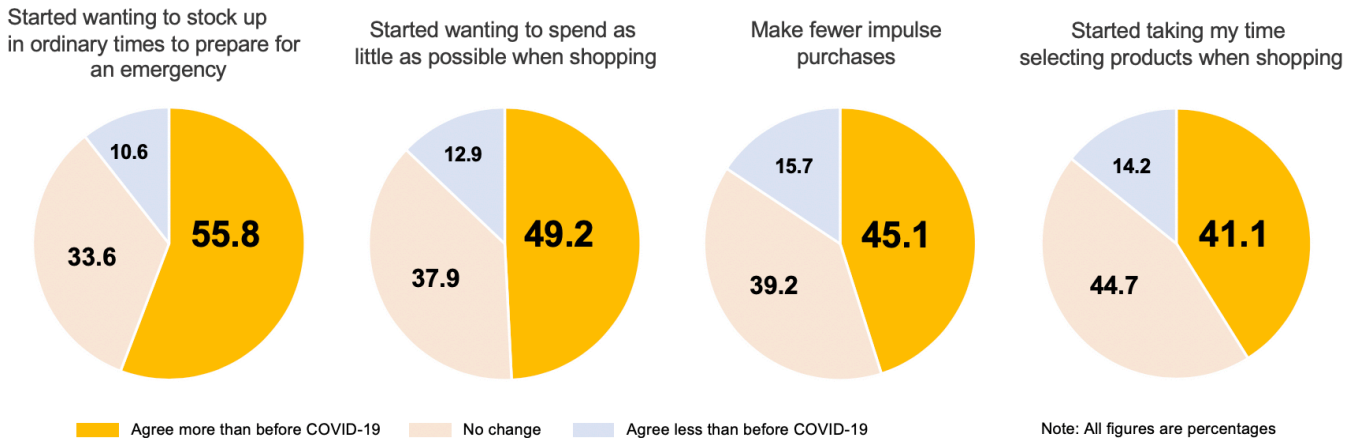
Note: All figures are percentages

● Changes in consumption attitudes and behavior: Data (3)

Respondents became cannier in their shopping behavior, as seen in the scores for Started wanting to spend as little as possible when shopping (49.2%), Make fewer impulse purchases (45.1%) and Started taking my time selecting products when shopping (41.1%).

Q: Do you feel that your consumption attitudes and behavior have changed compared to before COVID-19?

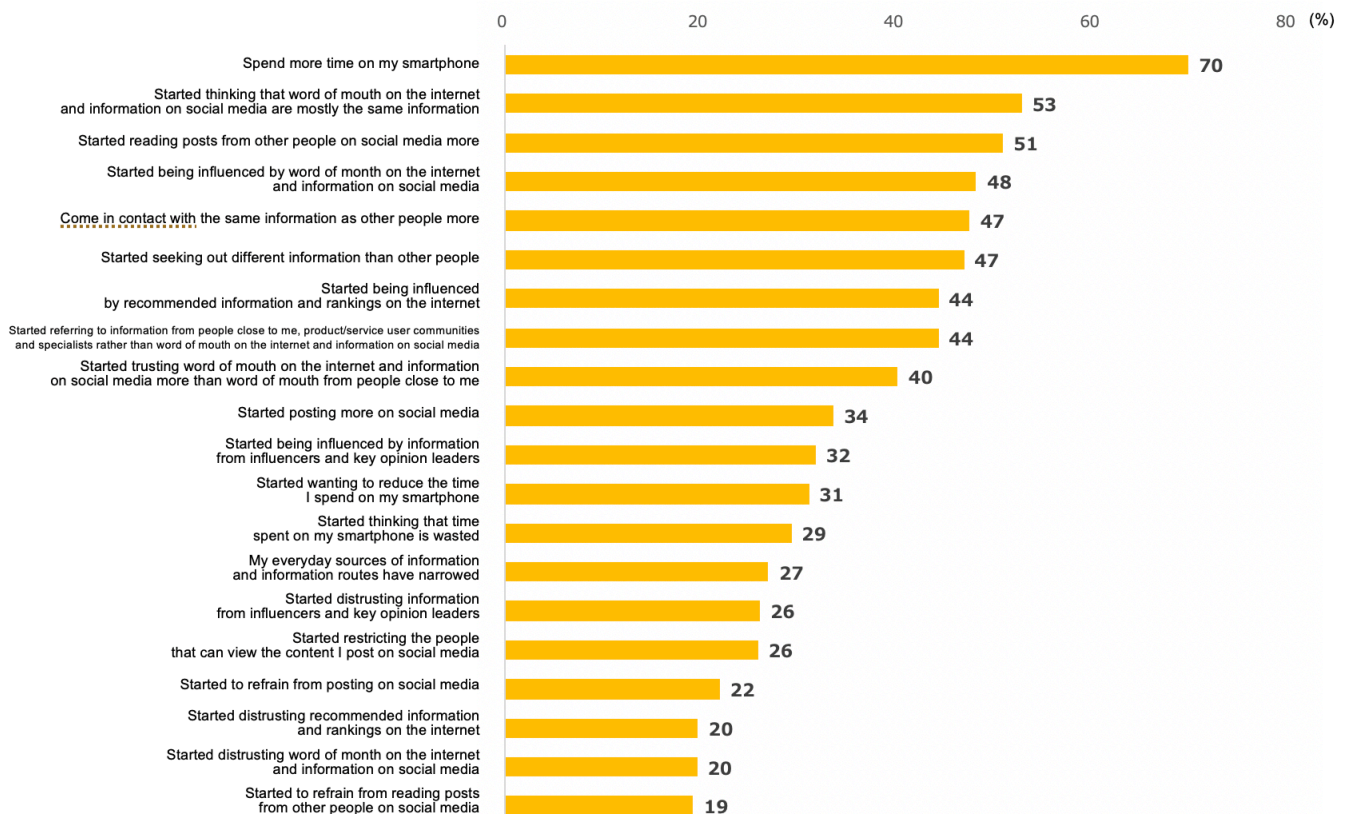
Select one response for each item that applies to you. (Single response)



● Changes in attitudes and behavior related to information: Data (1)

Some 69.7% of respondents said they Spend more time on my smartphone, and due to this, 50.8% reported that they Started reading posts from other people on social media more.

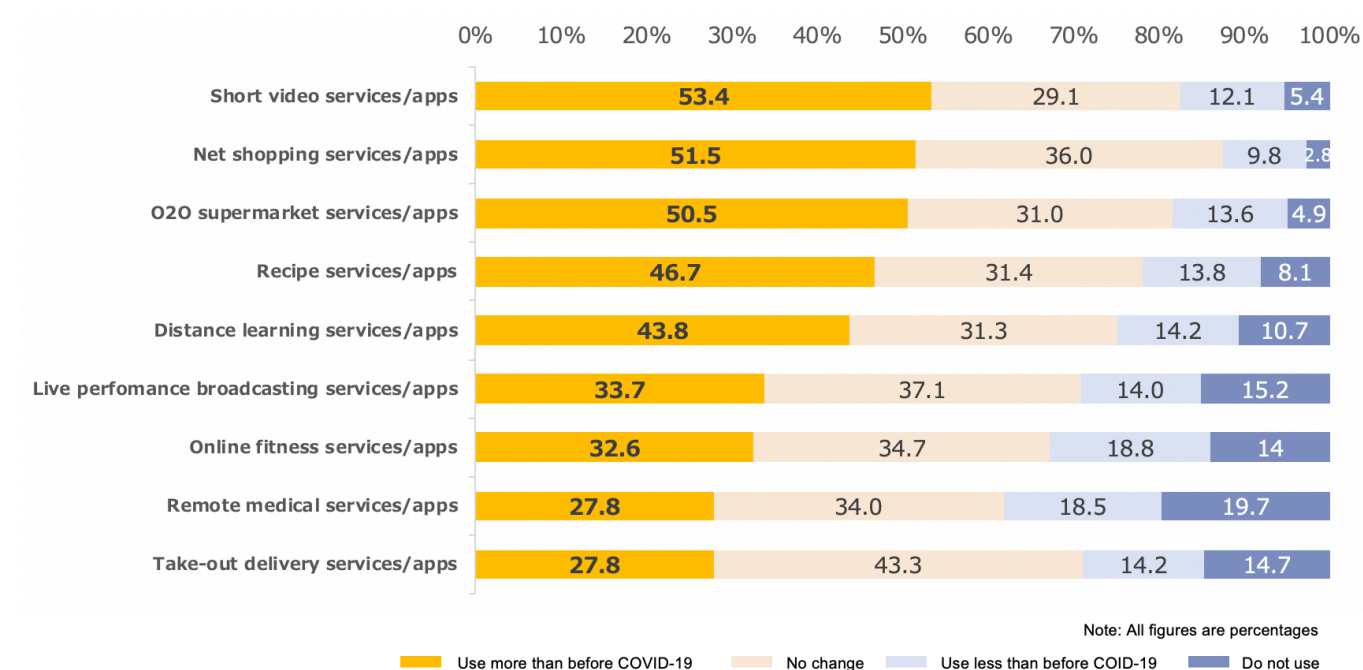
Q: Do you feel that your attitudes and behavior related to information have changed compared to before COVID-19? Select one response for each item that applies to you. (Single response)



Changes in attitudes and behavior related to information: Data (2)

The top three changes in online/app service use were increased use of Short video services/apps (53.4%), Net shopping services/apps (51.5%) and O2O supermarket services/apps (50.5%).

Q: Do you feel that your attitudes and behavior related to information have changed compared to before COVID-19? Select one response for each item that applies to you. (Single response)



Survey outline

Survey name: Survey into Changes in *Sei-katsu-sha* Attitudes Due to COVID-19 (February 2020)

Survey method: Internet survey

Territory: Tier 1 cities (Beijing, Shanghai, Guangzhou, Shenzhen)
New Tier 1 cities (Tianjin, Qingdao, Nanjing, Suzhou, Hangzhou, Zhengzhou, Wuhan, Changsha, Dongguan, Chengdu, Chongqing, Xian)

Respondents: 1,440 males and females aged 20–59

Survey period: February 24–March 4, 2020

About Hakuhodo Institute of Life and Living Shanghai

Hakuhodo Institute of Life and Living Shanghai, a wholly-owned subsidiary of Hakuhodo Inc. of Japan, is a think-tank established in Shanghai in 2012 to serve the Hakuhodo Group in China. Leveraging *sei-katsu-sha* research know-how amassed in Japan, the Institute supports companies' marketing activities in China, while developing local insights and making proposals on future ways of living in China.

Key current activities

- The Dynamics of Chinese People: Research that intuit the true desires of *sei-katsu-sha* and puts forward ideas for new ways of living
- Developing new methods: Development of new methods for contributing to companies' marketing activities
- Putting forward new viewpoints: Offering new ways of looking at *sei-katsu-sha* and markets

The fruits of these activities are provided to customers through the Hakuhodo Group's offices. Some of the results are also made public through presentations of research findings, the Hakuhodo Institute of Life and Living Shanghai's website, publications and by other means.