

後疫情時代下的「宅經濟」與「食經濟」：防疫仍要好吃、好玩，創新商機崛起

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2020 年在 Covid-19 疫情中過了一半，不少國際龍頭品牌受到衝擊——女性內衣品牌維多利亞的秘密 (Victoria's Secret) 英國分公司宣布保護破產，無印良品 (MUJI) 美國公司也聲請加入 110 多家倒閉公司的行列。然而，商機並非完全消失，而是有了新態勢。「『宅經濟』(Stay-at-home Economy) 正當道！」美國《高速企業》網站 (Fast Company) 點出關鍵。

「Covid-19 已經永遠改變了人們的生活方式，」英國《經濟學人》雜誌 (The Economist) 不約而同指出，即使各國政府已經紛紛解封，多數人的生活型態已經不同以往。在這股轉變下，消費者的習慣有哪些轉變？又能從中找到哪些未來創新之道？不妨從以下趨勢中找線索：

趨勢 1: 「食經濟」旋風 — 美食誘惑不減，在家研發烹飪、烘焙、外帶需求暴增

首先，是人們每天離不開的小事——「吃」。

益普索 Ipsos 於今年七月所發表的研究報告〈餐飲業的挑戰〉(The Horeca Challenge) 中點出疫情在中東和北非地區 (MENA, Middle East and North Africa)，高達 81% 的消費者變得更愛嘗試新食譜，這股趨勢同時讓烹飪相關節目變得更受歡迎，有 49% 的人會收看烹飪頻道。



這股生活新型態在國內也可以窺見。根據經濟部統計資料顯示，6 月份國內餐飲營業額為 638 億元，較去年同期減少 7%。益普索台灣研究指出，即便國內受疫情衝擊不如美國、中國大陸、歐洲國家等來得劇烈，許多人仍維持原本的生活和工作型態，但在「保持社交距離」觀念的風氣下，消費者仍盡可能減少前往餐廳或人群聚集的地方，Uber Eats、Food Panda 等外送服務的營收較去年同期成長了三倍。光是今年 3 月，Uber Eats 的平均每人訂購數就由前一個月的 5.6 次增加至 7 次。「餐盒」、「健康」、「食材」、「養生」則成為網路上熱門討論關鍵字。

以樂天市場於今年 5 月發表的統計調查為例，2020 年第一季的生鮮冷凍食材和即食食品銷售量較去年同期提升近 3 倍，平均訂單金額也較往年高出 30%，顯示消費者在家下廚的頻率大大提升。在歐洲國家，海外國人則因中式餐廳紛紛關門，在家動手挑戰各式台式料理成了新樂趣，並在社群媒體上將秘訣分享給其他思念家鄉味的人。

在中國大陸，視頻網站〈嗶哩嗶哩〉的美食相關影片在疫情爆發後的兩個月內點閱率爆衝至 5.8 億；食譜 APP「下廚房」下載量則在一個月內從 100 萬飆至 225 萬。

《經濟學人》雜誌在八月以「120% 的『食經濟』(gastronomy)」為標題，點出這股後疫情時代的生活新風潮：從 Google 全球關鍵字搜尋統計模型來看，「酵母」(yeast) 的搜尋流量光是在 4 月份就上升了 280%，意味著人們在家裡不只煮飯、還玩起了烘焙。估計與「在家」也要追求「好吃」的商機將成長 120%。



即使食經濟相關的搜尋次數隨著疫情趨緩逐漸下滑，仍較疫情前來得高。截至七月底，「食譜」(recipe) 搜尋次數比疫情前高出 22%，「外帶」(takeout) 則依舊高出 85%。這份數字呼應了益普索〈餐飲業的挑戰〉報告統計：2020 年以來，只有 36% 的消費者放心在餐廳裡用餐，「從『店內』(on-trade) 移轉到『店外』(off-trade)」是不可擋的用餐趨勢。

趨勢 2: 另類「宅經濟」— 消費者拒當沙發馬鈴薯，在家健身器材成創新商機

事實上，烹飪為的不只是美食，還有過程中的療癒。這股「紓壓」需求，也帶動運動產業巨變。當疫情衝擊傳統健身產業，北京光是今年第一季就有超過 200 家健身房歇業，美國健身業截至七月初的損失則高達 70 億美元；但同時，另一股旋風悄悄掀起。

益普索 Ipsos 今年五月發表一項針對全球 16 個國家進行的調查研究顯示，疫情之下，不少消費者人心惶惶且脫離正常的生活模式，許多人表示因疫情影響無法出門運動而備受困擾，在日本高達 38%，在韓國 (37%) 與中國大陸 (31%) 也不少，隨之而來的是壓力之下的暴飲暴食與失眠問題。

〈經濟學人〉最新公布的 Google 關鍵字搜尋分析顯示：當在家工作無可避免，卻又無法上健身房，消費者們不想捨棄健康與體態，於是，「站立辦公桌」(standing desk) 的搜尋次數從今年一月來不斷飆升，直至七月底已上升了 129%。在家就可鍛鍊身材的「啞鈴」(dumbbell)，搜尋次數目前仍比疫情之前高出了 64%，健身 APP「Strava」的搜尋次數目前也仍高出 103%。

隨著在家用健身器材需求崛起，台灣的健身器材大廠岱宇營收連續三個月創下新紀錄，六月營收較去年同期成長了 199%。這股趨勢也帶動了網路上的討論熱潮。根據益普索台灣社群智慧分析 (SIA) 資料顯示，今年 2 月至 8 月，在各大網路論壇、部落格、推特 (Twitter) 和臉書 (Facebook) 等平台，疫情之下避免去健身房衍生出「在家運動或健身」的討論，較去年同期增加了一倍，「啞鈴」、「有氧」等關鍵字也因此受到熱烈討論。

在巴黎、西班牙等國，私人教練在陽台上為附近各自站在自家陽台拿著健身器材、站在瑜珈墊上的人們上起了健身課，成為保持社交距離之下的健身教學方式。根據 Adobe 統計，今年三月，健身器材光是在網路上的銷售量，在五天之內就大幅成長了 55%。

美國新創公司 MIRROR 就找到絕妙商機——MIRROR 研發了一款鏡子，獨特的是，這款鏡子是配有嵌入式鏡頭和揚聲器的「數位鏡」，用戶只要在家對著鏡子，就可以上有氧運動、重量訓練和拳擊等課程，在鏡子的虛擬互動中向健身教練學習正確的動作，同時透過數位鏡顯示出的每分鐘心跳、卡路里消耗等數據，精準掌握自身的健身狀況。在美國疫情爆發後的幾周內，MIRROR 產品的銷售額也隨之翻倍。

趨勢 3: 更「數位」— 不出門也要好玩，帶人超脫現實的螢幕娛樂不容小覷

最後，娛樂生活也出現轉變。〈經濟學人〉公布的 Google 關鍵字搜尋數據顯示，「門票」(ticket) 的搜尋次數大幅下滑，即使在四月後各國紛紛解封以來逐漸回升，目前仍較疫情前少了 58%。不過，這並不代表人們放棄了好玩的生活，只是需求由實體轉往數位管道。

根據益普索今年七月一項針對 26 個國家進行的調查研究顯示，疫情以來，尤其在阿根廷 (45%)、墨西哥 (42%)、巴西 (32%) 等新興國家，不少消費者的娛樂支出較疫情前不減反增，其中以 35 歲以下的年輕人最為明顯，但超過 35 歲的族群消費力道也不容小覷。

益普索洛杉磯專職串流與電玩產業的資深總裁康隆 (Gregory Conlon) 分析，螢幕帶人們走入超脫現實的世界，愈來愈吸引人。「新型態娛樂成為消費者願意付費享受的對象，『隨選影視會員』 (Premium Video on Demand，指消費者可以在網路平台上自由選擇想要看的影片內容) 就是一例，愈來愈多電視、電影製片商在作品製作之初就直接鎖定網路播出。」2014 年，由 Netflix 製作的網路原生劇〈紙牌屋〉 (House of Cards) 播出爆紅掀起話題後，這股趨勢便逐漸成形。近年來，英國 BBC 也採取類似做法。

〈經濟學人〉公布，今年 7 月，在 Google 光是搜尋「Netflix」付費影音平台的次數較去年同期高出了 23%。愛爾蘭市場研究出版公司 Research And Market 指出，在疫情影響之下，全球影音串流產業市場產值將從去年的 248 億美元翻倍，在 2020 年達到 503 億美元。

益普索於今年三月發表〈媒體串流 360〉 (Media Streaming 360) 研究報告分析：疫情除了讓人們更常付費享受影音串流，享受形式也從「我」 (me) 逐漸轉變成「我們」 (we)，意即由獨自觀影轉變為與家人朋友一起享受。隨著人們在家觀影也不甘寂寞的趨勢下，Google 則是推出新的應用程式「Netflix Party」，讓消費者能在家裡與身在不同地方的親朋好友一起遠距追劇。



疫情走向仍沒有定數。但可以確定的是，後疫情時代的消費行為並非偶然，而是將原先已漸漸形塑而成的消費模式進一步推升的結果。掌握人們需求並提早因應轉變，仍是在危機中找到商機、在市場上脫穎而出的最大關鍵。

Ipsos 益普索市場研究

Ipsos 是全球頂尖的專業市場調查研究機構，在全球九十個國家及地區設有分公司，在挖掘顧客經驗，執行品牌行銷調查，我們具有創新的思維與先進的科技。我們是世界頂尖企業執行長最信賴的企業顧問，我們也有熟悉各產業的專家協助測量、模擬和管理顧客與員工關係。

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Market Trend: “Stay-at-Home Economy” and “Gastronomy” in the post Covid-19 world

Yachi Chen, Ipsos Taiwan Project Manager

It is now the summertime in 2020 after the time goes by in the pandemic. Looking back this year, many leading international brands are impacted by the Covid-19 outbreak. The British branch of the lingerie brand Victoria's Secret has declared bankruptcy in the UK, and MUJI also failed to survive in the US. However, this does not mean that the opportunity in the market is entirely disappearing but transforming. “A stay-at-home economy is on the rise!” according to Fast Company website.

“Covid-19 seems to have changed lifestyle for good”, the Economist pointed out. Even if most countries have eased restriction, people's way of living have changed. Under the circumstances, how the consumers behaviors have transformed? What can business do to innovate?

1st Trend: “Gastronomy”— Remaining Enjoyment of Eating Leads to the Increasing Demand of Cooking, Baking at Home and Takeaway

The first transformation happens to “eat”, one of the most important daily routine in people's everyday life.

“Cooking is no longer a chore!” The Horeca Challenge, a report published by Ipsos in July, pointed out one of the greatest changes of human life. According to the report, in MENA (Middle East and North Africa) alone, 81% of individuals are trying new recipes. Moreover, people thus are interested in food and cooking relevant shows or video, resulting in 49% of individuals watch food and cooking channels.



The tendency also appears in Taiwan market. According to the statistical data from Ministry of Economic Affairs, the total revenue of food and beverage in June is 63.8 billion NT dollars, decreasing by 7% as that of the same period last year. Based on Ipsos Taiwan's latest study, the revenue of food delivery, such as Uber Eats and Food Panda, has grown 3 times compared with the same period last year. Although Taiwan was not hit by the Covid-19 impact as much as other countries, such as the U.S., China, or in Europe that many individuals' work and lifestyle still remains the same, people tend to avoid eating in a restaurant or crowded place due to the tendency of keeping “social distance. This March, the average orders of Uber Eats increased from 5.6 to nearly 7 compared to the previous month. “Boxed meal,” “healthy,” “ingredient,” and “regimen” thus have been heating discussed on the internet.

According to the statistics released by Rakuten, the e-commerce giant, the sales amount of frozen food and instant food has increased as 3 times as that of the same period last year, and the average amount per order is 30% higher than usual, implying the tendency that more and more people would like to cook at home. In European countries, Taiwanese living abroad started to make various Taiwanese cuisine by themselves as a new habit due to most of the restaurants are closed. They tend to share the tips and experiences on social media with other people.

In China, the clicking through rates of the food and cooking relevant video clips on Bilibili, one of the biggest video sharing websites in China, had surged to 580 million within the 2 months after the coronavirus outbreak. Xiachufang (下厨房), an App for recipe downloading, dramatically increased from 1 million to 2.25 million within one month.

The Economics further highlighted this trend with an article titling “120% gastronomy,” pointing out the new lifestyle in the post covid-19 era: the statistical model on Google search data shows that the searches of “yeast” rose 280% in April alone, implying that people enjoy not only cooking but also baking at home. The Economics states that the business opportunities resulted from enjoying food at home will grow 120%.



Although the gastronomy relevant Google search are decreasing, they are still higher than those before the coronavirus outbreaks. At the end of July, the traffic of “recipe” is still 22% higher than usual before outbreaks, and “takeout” is 85% higher than that. Correspondently, in The Horeca Challenge, the latest data shows that only 36% consumers around the world feel comfortable eating in a restaurant. “The on-trade to off-trade shift” is inevitable.

2nd Trend: A new type of “stay-at-home economy”—No Coach Potato but Fitness and Workout at Home

In fact, people enjoy cooking not only for the food but the joy during the process. Such a “relaxing” needs also trigger the transformation in the sport industry. Impacted by the corona virus outbreak, there were more than 200 gyms shutdown in Beijing in the first quarter alone. In the US, the loss of the gym industry due to the outbreak reached 7 billion dollars by the beginning of July. However, another opportunity is rising.

According to a survey published by Ipsos in May, covering 16 countries around the world, many people have been suffering from anxiety when their life went away from the normal pattern. In Japan, 38% of individuals states feel upset due to under exercising. The same situation happens to people in Korea (37%) and China (31%) while overeating and insomnia become another two issues.

The Google search data highlighted by the Economist further illustrates the influence resulted from people’s desire to exercise during the pandemic: when it is inevitable to work from home and unavailable to go to a gym while people still want to put health and fitness in priority, the search traffic of “standing desk” has surged ever since this January, increasing 129% by the end of July. “Dumbbell,” enabling people to fitness at home, are searched by consumers 64% more frequently than that before the outbreak. The searches of “Strava,” a popular fitness app, is also 103% higher than before.

Based on the increasing needs of the fitness equipment at home, the revenue of Dyaco, a manufacturer of fitness equipment in Taiwan, hit a new high record for three months; moreover, its revenue of this June increase 199% from the same period last year. It further triggered the intensive discussion on the internet. According to Ipsos Taiwan Social Intelligence Analysis, from this February to August, the internet volume about “working out or fitness at home,” potentially resulted from the tendency to avoid going to a gym during the outbreak, has doubled from the same period last year. The relevant keywords, such as “dumbbell” and “Cardio Exercise,” thus generates discussion.

In European countries, such as Paris and Spain, people stand on their balcony with their equipment and yoga mat to have a “distance fitness class” with a personal trainer on another balcony nearby, becoming an alternative way of fitness with maintaining the social distance. According to the statistic from Adobe, this March, the sales of fitness equipment on the internet alone had increased 55% within only 5 days.

MIRROR, a startup based in the US, has developed the innovation opportunities. The Mirror, its popular product, is a digital mirror with lens and speakers. The users can have a various of fitness class, such as Aerobic exercise, weight training, and boxing by learning from the virtual interaction in the mirror. Meanwhile, they can have a better understanding about their own situation precisely through the data shown on the mirror, such as heartbeat, burn calories. Within a few weeks after the coronavirus outbreak in the US, the sales amount of MIRROR’s products had doubled.

3rd Trend: advanced “digital” —Screen Entertainment for More Fun and Hyper-reality at Home

Finally, the way of entertainment has also transformed. According to the Google search data released by the Economist, the searches for “ticked” has dramatically decreased due to the Covid-19 outbreaks. Even if it has gradually increased after most countries ease the restriction, the searches are still 58% less than before. However, this does not mean that people stop seeking for fun but simply switched from offline to online.

A survey published by Ipsos, covering 26 countries pointed out that many consumers’ overall spending on entertainment has increased during the pandemic, especially in emerging countries such as Mexico (42%) and Brazil (32%). The phenomenon seems most obvious on young generation under 35 years old while those over 35 also shows a powerful consumption need.

Gregory Conlon, Senior Vice President at Ipsos in Los Angeles, who handles streaming and gaming clients, pointed out the fact that it is greatly attractive for people to enter the hyper-reality world with the “screen entertainment.” “There are new entertainment sources available to spend on – one example would be Premium VOD (Video on Demand), where a number of movie studios have pushed their films that were meant for theaters directly online.” The tendency has shaped ever since House of Cards, an online streaming series launched and originally broadcast on Netflix, outbid the other networks and generates heating discussion. In the recent year, BBC also takes the similar approach.

Based on the data released by the Economist, in this July, the searches of Netflix as one of the most popular video streaming platforms alone is 23% higher than that of the same period last year. According to Research and Market, a market research store based in Ireland, pointed out that the global content streaming market is expected to grow from \$24.8 billion in 2019 to \$50.3 billion in 2020 resulted from the influence of the outbreak.

Media Streaming 360, a report published by Ipsos this March, states that the form of enjoying content streaming has transformed from “me” to “we” along with the tendency that people spend more on it, that is, consumers tend to enjoy the streaming content with friends or family instead of alone. Under this tendency that people would like to seek for accompany when streaming videos at home, Google launched Netflix Party, a new App enabling people to remotely watch on-demand videos with friends or family anywhere.



No one can tell how the world will go under the coronavirus. However, it is for sure not a coincidence that the consumer behaviors have formed to what it is today but further reinforced with the tendency shaped in the long term. Understanding consumers’ need and take an early step for innovation remains the key to stand out in the market and turn a crisis into an opportunity.

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