



Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

Anticipating the new normal

2nd Wave



Results Report

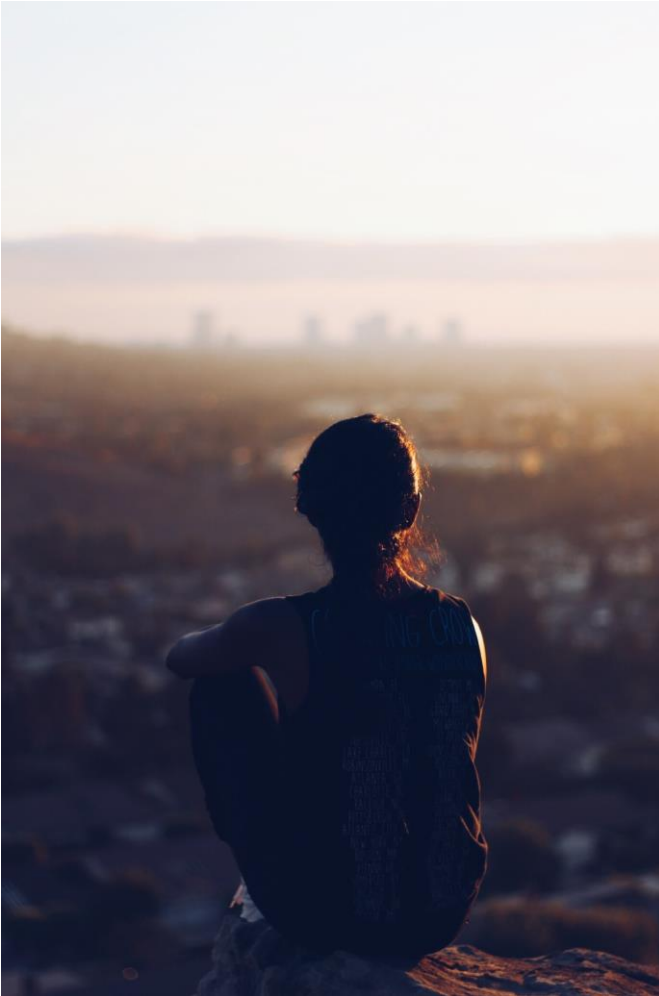


February 2021

Punto de Fuga is a member of the **Artis** International network.



PROJECT CONTEXT



After almost a year living in a pandemic, the Coronavirus has become part of our daily lives.

With a tremendous initial irruption, with devastating effects in all senses (emotionally, with regards to health, socially and economically), almost a year later its presence is still a protagonist in the daily life of society, and is so worldwide.

It is therefore necessary to continue analyzing how this paradigm shift has affected, and continues to affect our lives: COVID-19 has generated a new framework of reality in which new concerns, new views and new needs arise; to which institutions, companies and brands must respond appropriately if they want to remain relevant.

The future remains in the realm of uncertainty and the new normal is still under construction.

However, it is foreseen that with the remission of the virus, the arrival of vaccines and the longed-for herd immunity, some of these changes will subside, as they are forced and unwanted, but others will undoubtedly remain.

... since **COVID-19** has also been, in a certain sense, an accelerator, a **CATALYST OF CHANGE**, which in certain areas is irreversible, with no turning back.

In this context, Punto de Fuga together with the ARTIS network have taken out the second wave of the international study "anticipating the new normal".

It is necessary to continue to understand our changing reality, in order to remain in tune with the needs of the market.

International 'New Normal' Study - 2nd Wave – Methodological approach



3,011 online interviews



17 minutes LOI



Individuals **over 18 years of age**
Worldwide in 10 countries



Work performed between
December 10 to 18, 2020

Sampling error (95% CI):
 $\pm 1.79\%$ at global level
 $\pm 5.66\%$ per country

Test countries:

Spain



n=301

France



n=300

Germany



n=300

Italy



n=301

UK



n=303

Argentina



n=300

Brazil



n=300

Chile



n=305

Mexico



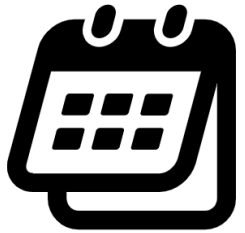
n=301

USA



n=300

CONTENT



**Almost a year
living in
Pandemic**

**Experiences and Social
Impact**



**The new normal is
consolidated**

**Establishment of new behavioral
patterns**



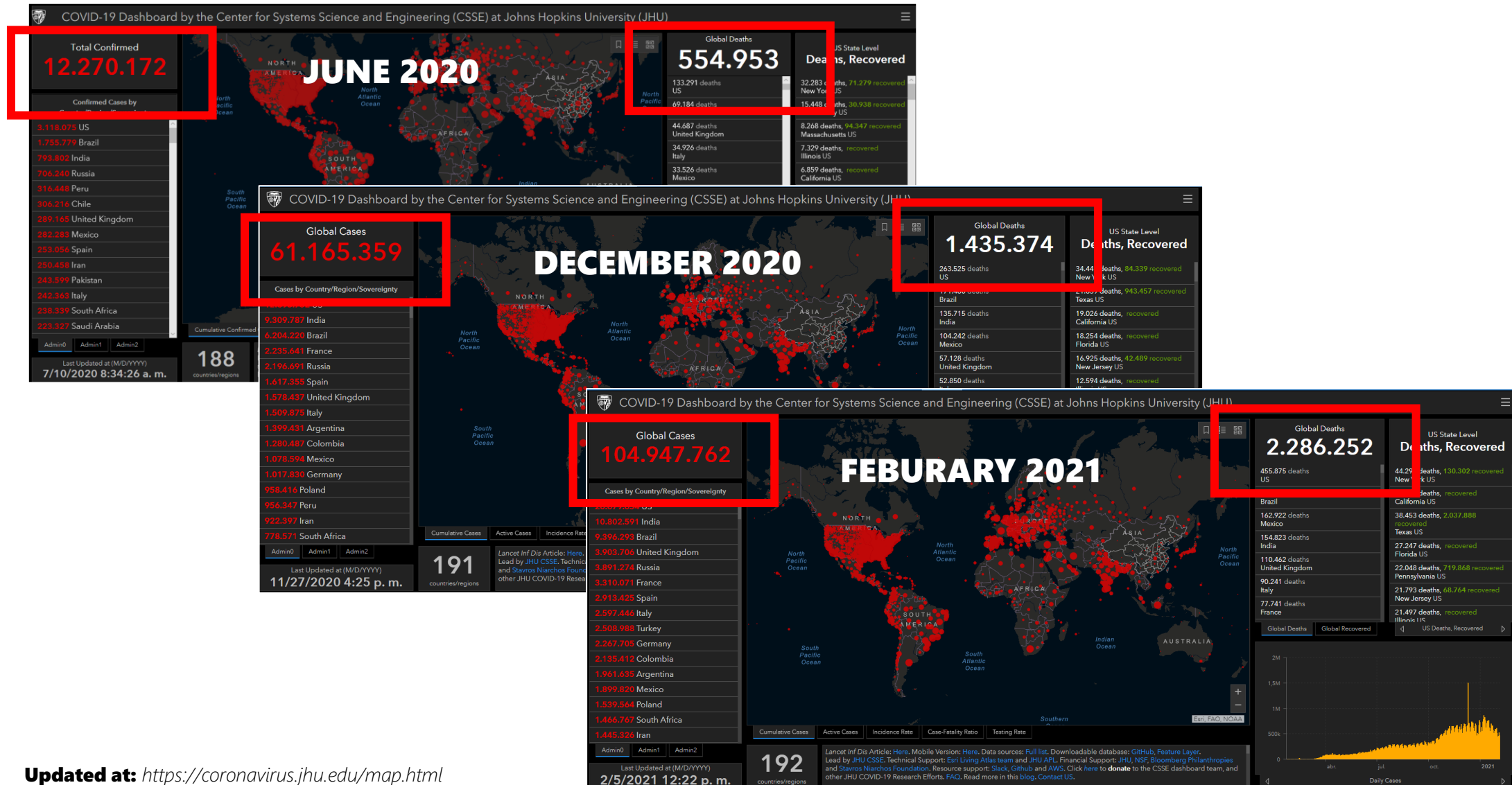
**COVID-19 as a
catalyst for change**

**Needs, drivers and channels :
the WHAT, WHY and HOW we buy
after COVID**

A man with a beard and short hair is looking out of a window. He is wearing a maroon sweater. The window has white curtains. Outside the window, there is a dark, stormy sky with heavy clouds. The scene is framed by a white border.

Nearly a year in pandemic

A global crisis... unbridled

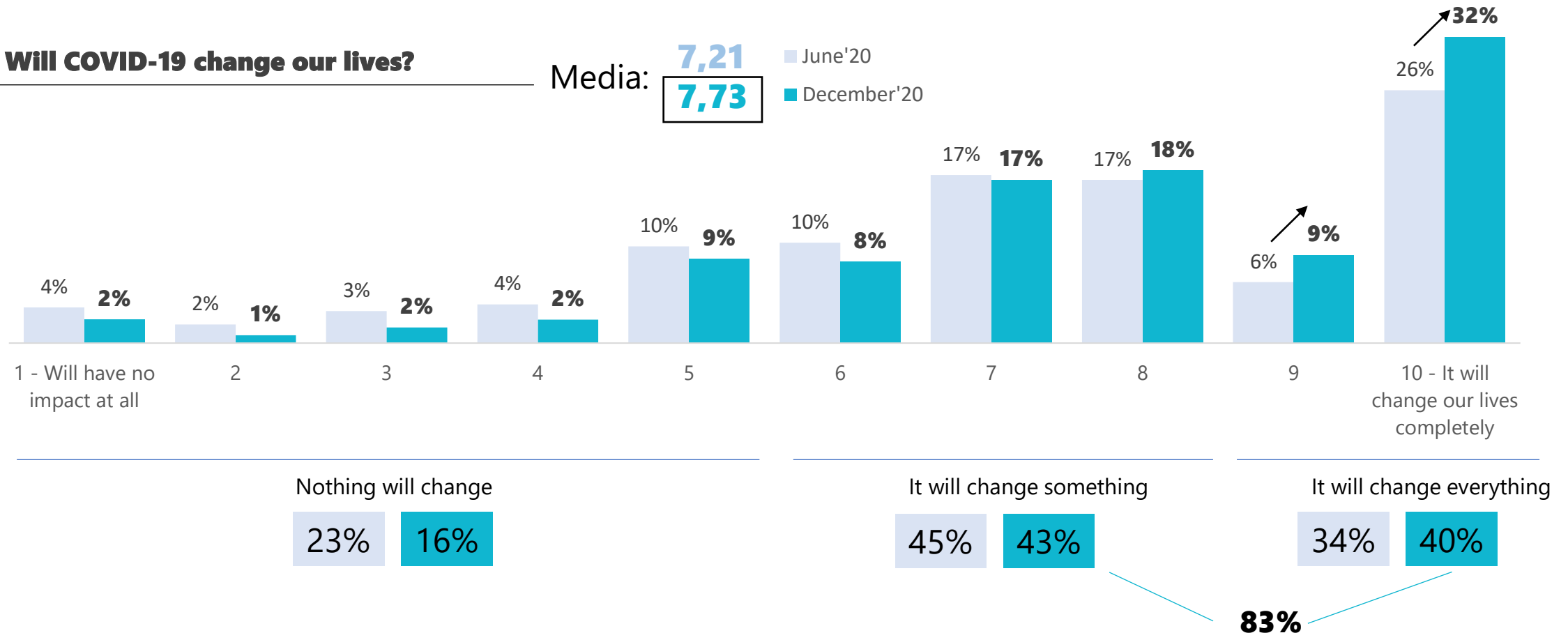


Updated at: <https://coronavirus.jhu.edu/map.html>

After so many months of pandemic, the perception increases that the impact of COVID-19 on our lives will stay forever (83%).

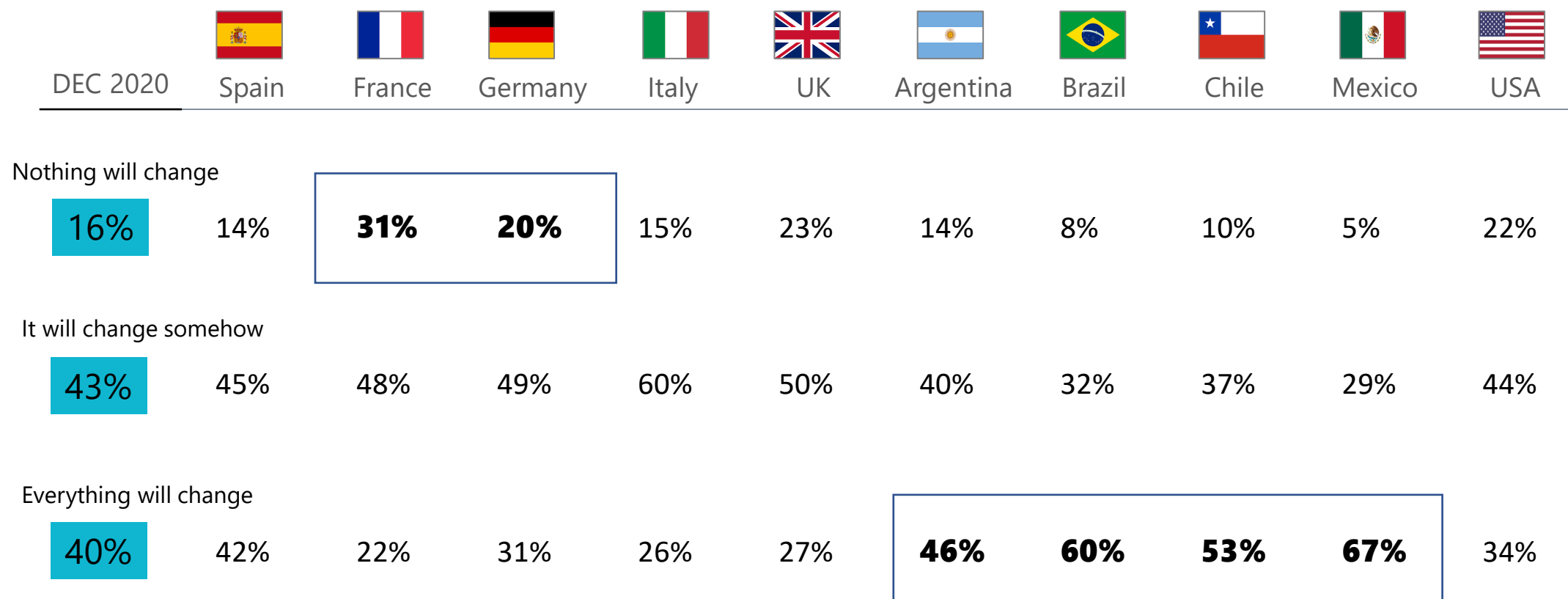
Will COVID-19 change our lives?

Media: **7,21**
7,73



Q17. To what extent do you think COVID-19 will change our lives?

An even greater perception of total change in LATAM

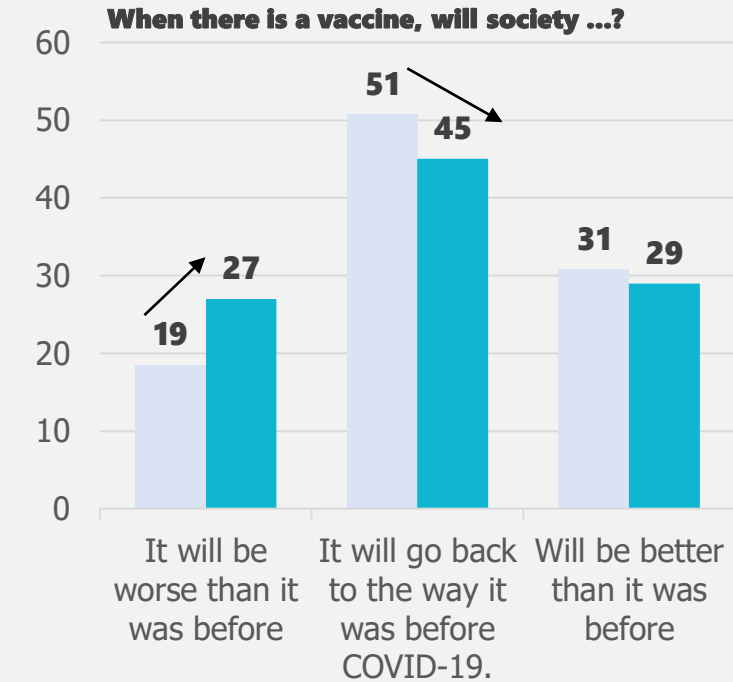


**However...
some social
disappointment
Society will
NOT be
better**



Sentiment (Difference between better & worse)

June'2020 **+12**
December'2020 **+2**

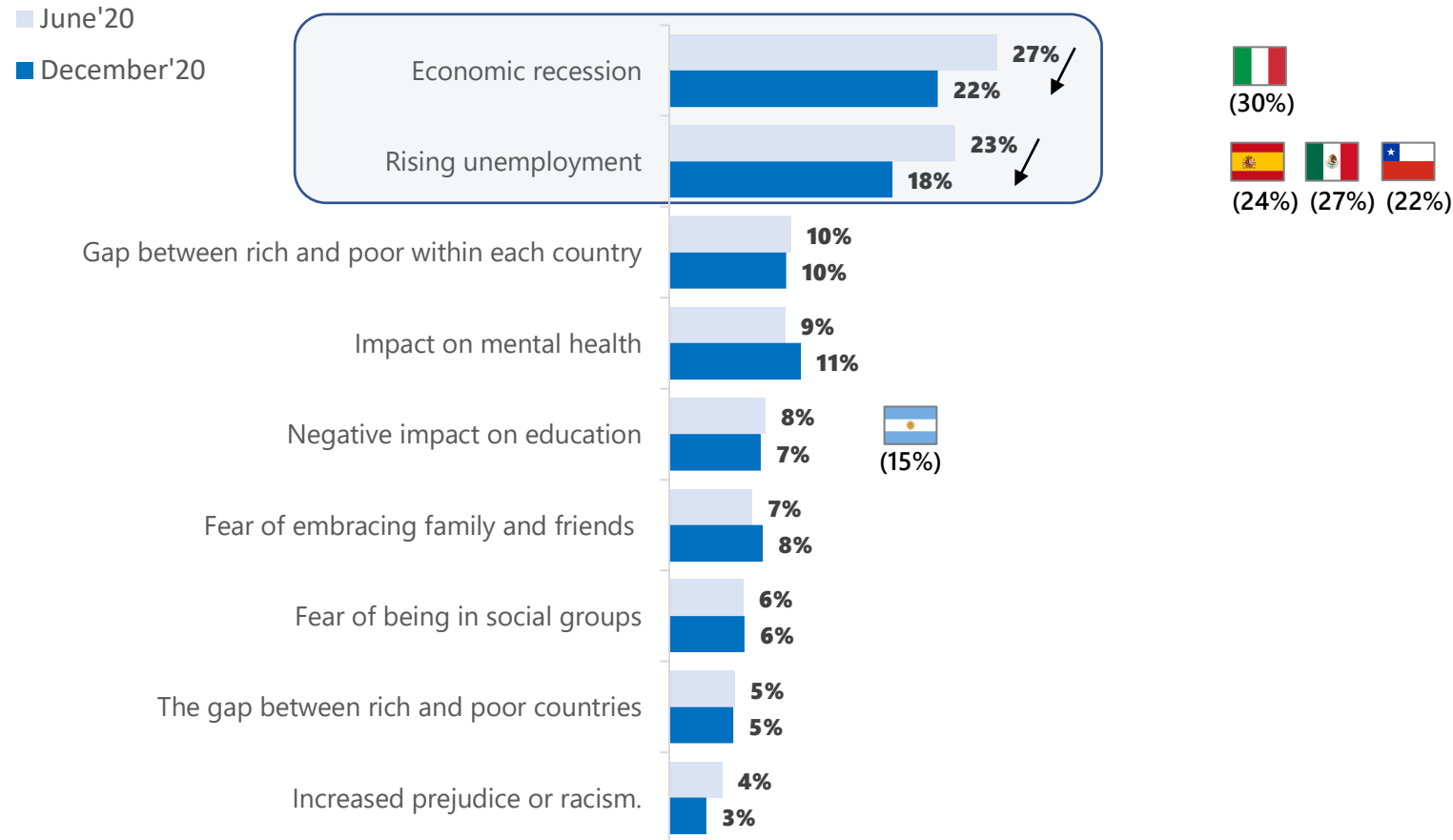


Slightly more optimistic in the Americas. More disappointment in Europe

| Better | 22% | 23% | 24% | 19% | 42% | 26% | 36% | 28% | 32% | 37% |
|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Stays | 52% | 45% | 39% | 45% | 32% | 49% | 46% | 48% | 54% | 36% |
| Worse | 26% | 32% | 37% | 36% | 26% | 25% | 18% | 24% | 15% | 28% |
| | -4 | -9 | -13 | -17 | 16 | 1 | 18 | 5 | 17 | 9 |

P18. When a COVID-19 vaccine becomes available, do you think society in general will

What is the worst consequence of the pandemic?



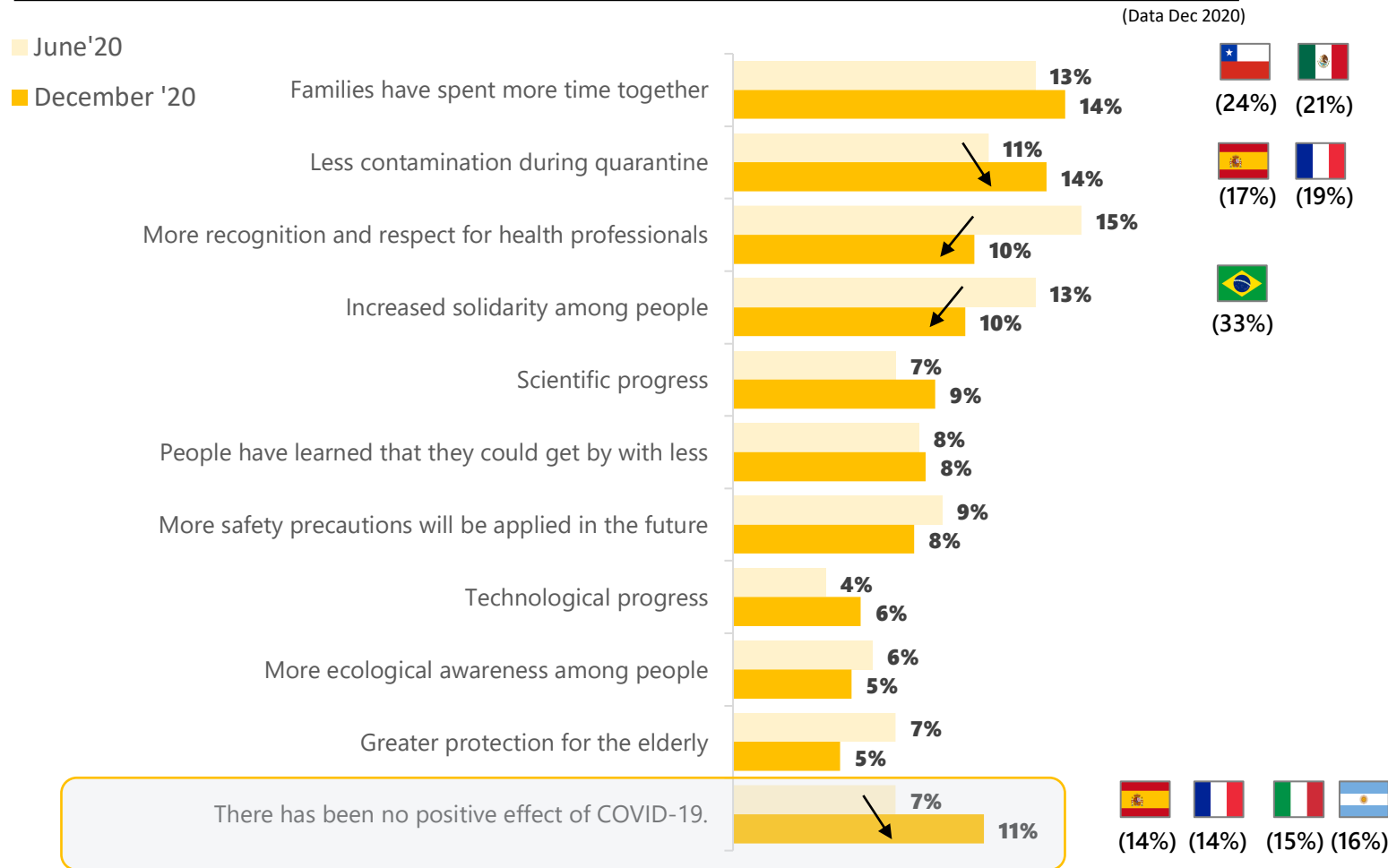
Expectations of economic impact are maintained

although its intensity is slightly reduced



P16. Besides the unfortunate number of deaths caused by COVID-19, what is the worst consequence of the pandemic?

What is the most positive effect of the pandemic?



Perception of positive aspects of the pandemic diluted

In particular, the perception of social recognition for health care professionals

Unsung heroes

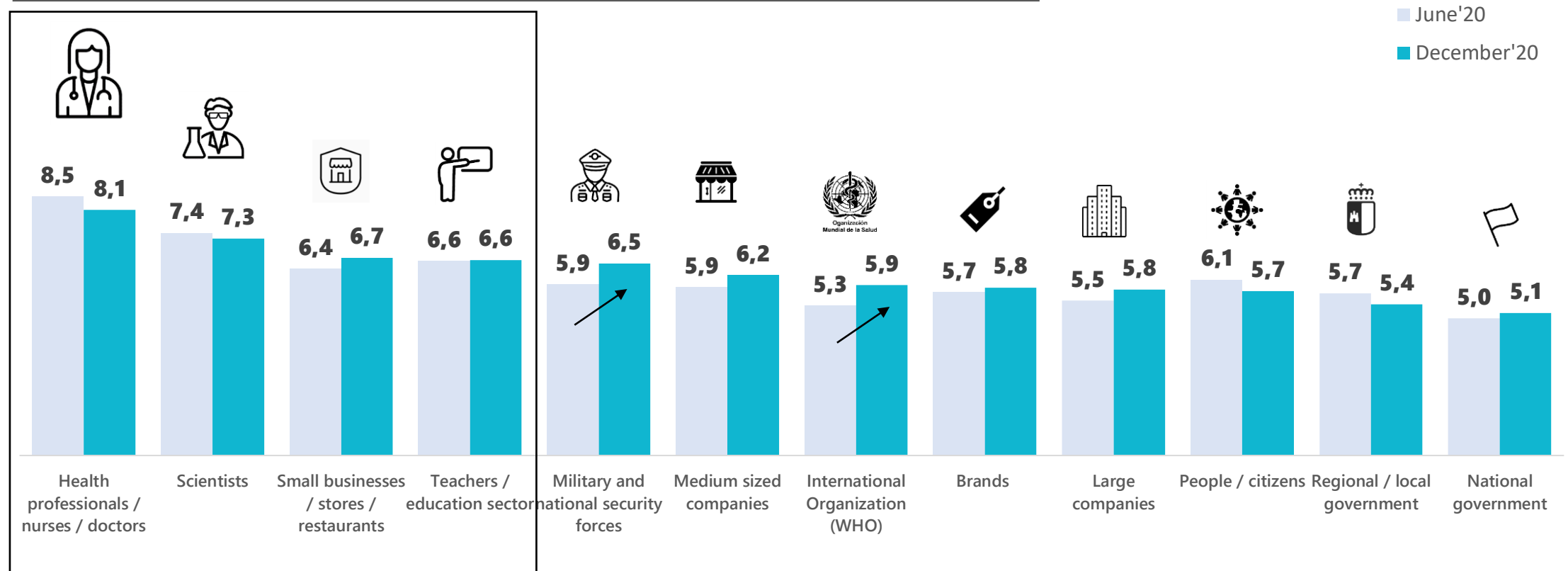


P17. Beyond all the negative consequences, what do you think has been the most positive effect of COVID-19? And secondly?

Despite the perception of not having sufficient recognition, healthcare professionals continue to be the highest rated professionals and governments the lowest rated.

In December improved WHO and security forces assessment vs. June

How is the management of the pandemic being assessed? (Average scores)



P18. On a scale of 1 to 10, how would you rate the response to and management of the pandemic of:

Nearly a year in pandemic: SOCIAL impact

Increased presence of pharmaceutical brands among the leading brands in pandemic, along with Amazon, retail and distribution companies
























































TOP 10 BRANDS BY COUNTRY - brands to be thankful for (Europe)

|  | | |  | | |  | | |  | | |  | | |
|---|------------------------|------------|---|--------------------|------------|---|-----------------|------------|---|------------------|------------|---|------------------|------------|
| Ranking | Brand | Thank you! | Ranking | Brand | Thank you! | Ranking | Brand | Thank you! | Ranking | Brand | Thank you! | Ranking | Brand | Thank you! |
| 1 | INDITEX | 13% | 1 | amazon | 7% | 1 | amazon | 9% | 1 | amazon | 19% | 1 | NHS | 37% |
| 2 | amazon | 11% | 2 | carrefour | 5% | 2 | BIONTECH | 3% | 2 | Pfizer | 4% | 2 | amazon | 13% |
| 3 | ZARA | 9% | 3 | NIKE | 3% | 3 | Pfizer | 3% | 3 | ARMANI | 4% | 3 | TESCO | 10% |
| 4 | Pfizer | 7% | 4 | Intermarché | 3% | 4 | LIDL | 2% | 4 | ESSELUNGA | 4% | 4 | Pfizer | 5% |
| 5 | MERCADONA | 7% | 5 | adidas | 2% | 5 | NIKE | 2% | 5 | AMUCHINA | 3% | 5 | Morrisons | 3% |
| 6 | IBERDROLA | 4% | 6 | orange | 2% | 6 | NETFLIX | 1% | 6 | Barilla | 3% | 6 | ASDA | 3% |
| 7 | El Corte Inglés | 4% | 7 | NETFLIX | 2% | 7 | DHL | 1% | 7 | coop | 3% | 7 | NIKE | 2% |
| 8 | Cruz Roja | 4% | 8 | Google | 2% | 8 | adidas | 1% | 8 | CONAD | 3% | 8 | Uber | 1% |
| 9 | NIKE | 3% | 9 | LIDL | 1% | 9 | SAMSUNG | 1% | 9 | NETFLIX | 2% | 9 | NETFLIX | 1% |
| 10 | adidas | 3% | 10 | Pfizer | 1% | 10 | zoom | 1% | 10 | enel | 2% | 10 | Microsoft | 1% |

P24. List the first brand that comes to mind that you think we should be grateful for their activities during the COVID-19 pandemic.

Also in the Americas, pharmaceuticals are emerging strongly as brands that have had and impact, as well as distribution and food companies. "Zoom" in the top 10 in several countries

TOP 10 BRANDS BY COUNTRY - brands to be thankful for (Americas)

|  | | |  | | |  | | |  | | |  | | |
|---|---|------------|---|---|------------|---|---|------------|---|---|------------|---|---|------------|
| Ranking | Brand | Thank you! | Ranking | Brand | Thank you! | Ranking | Brand | Thank you! | Ranking | Brand | Thank you! | Ranking | Brand | Thank you! |
| 1 |  | 10% | 1 |  | 10% | 1 |  | 8% | 1 |  | 13% | 1 |  | 13% |
| 2 |  | 6% | 2 |  | 6% | 2 |  | 4% | 2 |  | 10% | 2 |  | 11% |
| 3 |  | 6% | 3 |  | 5% | 3 |  | 4% | 3 |  | 6% | 3 |  | 8% |
| 4 |  | 5% | 4 |  | 5% | 4 |  | 3% | 4 |  | 5% | 4 |  | 5% |
| 5 |  | 4% | 5 |  | 5% | 5 |  | 3% | 5 |  | 5% | 5 |  | 3% |
| 6 |  | 3% | 6 |  | 3% | 6 |  | 3% | 6 |  | 4% | 6 |  | 3% |
| 7 |  | 3% | 7 |  | 3% | 7 |  | 2% | 7 |  | 4% | 7 |  | 2% |
| 8 |  | 2% | 8 |  | 3% | 8 |  | 2% | 8 |  | 3% | 8 |  | 2% |
| 9 |  | 2% | 9 |  | 3% | 9 |  | 1% | 9 |  | 3% | 9 |  | 2% |
| 10 |  | 2% | 10 |  | 2% | 10 |  | 1% | 10 |  | 3% | 10 |  | 2% |

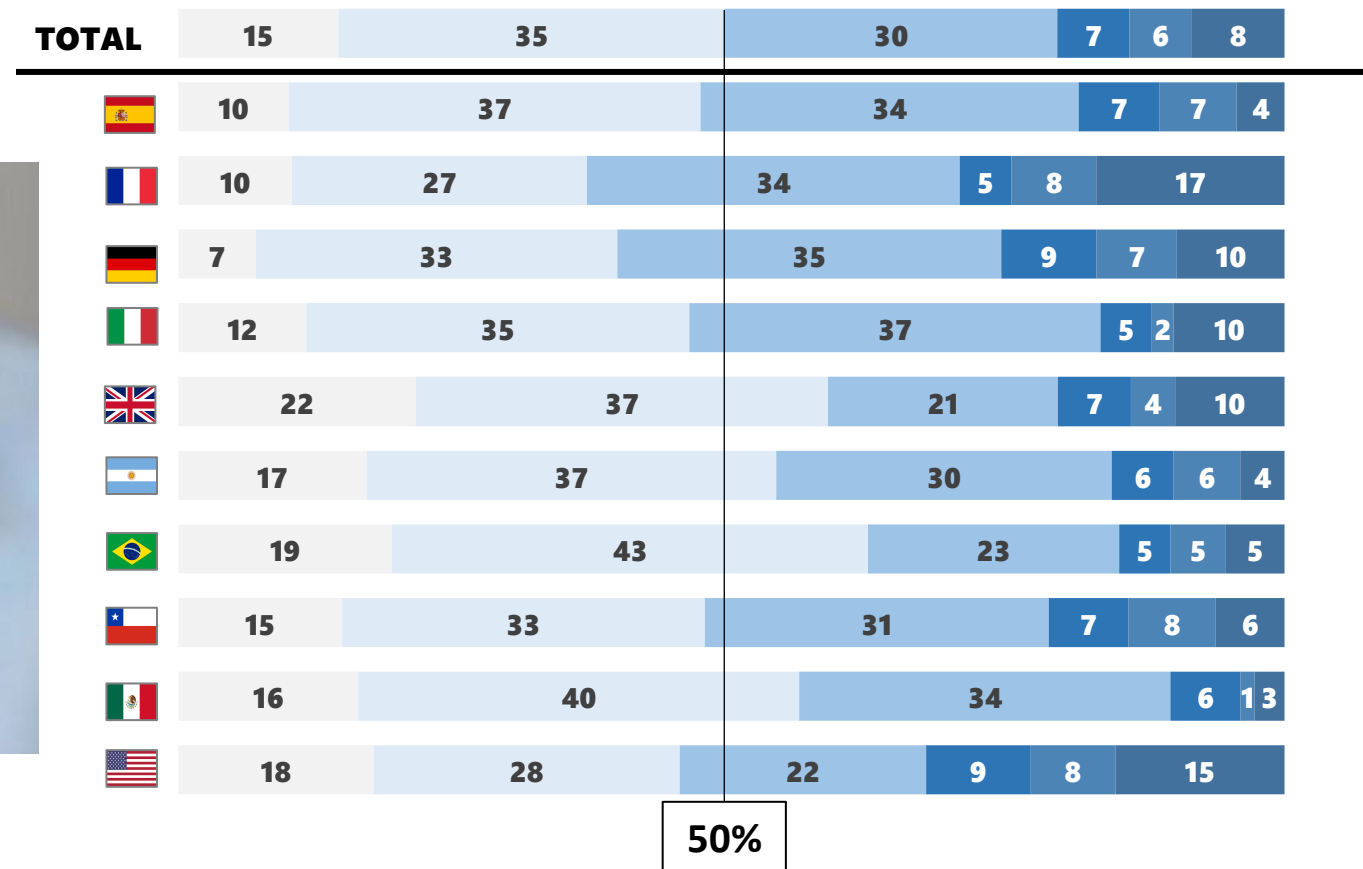
P19. List the top 3 brands that come to mind that most impressed you for their activities during the COVID-19 pandemic.

**The vaccine generates hope but
NOT IN THE SHORT RUN:**
for 50% it will take more than 1 year to
recover some normality



When do you expect to regain some normalcy?

■ In 6 months ■ Between 6 months and one year ■ Between 1 and 2 years ■ More than 2 years ■ Never ■ No idea

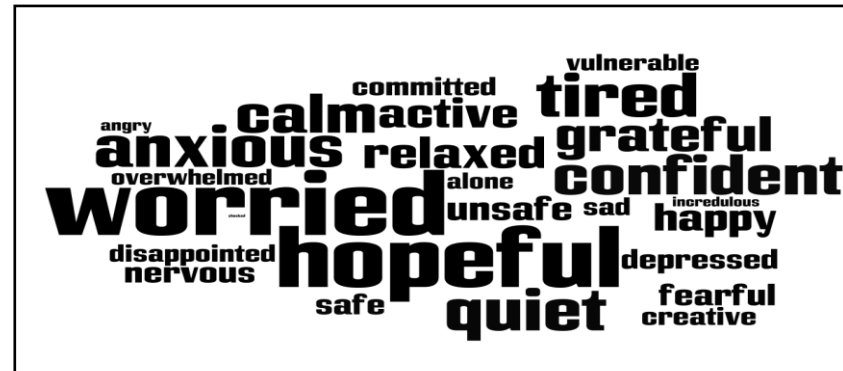


P30. After the recent announcement of the new advances of the different vaccines (Pfizer, AstraZeneca/Oxford, Moderna, etc...), when do you expect to recover some normality in your life? When do you expect to recover some normality in your life?

After months of pandemic, emotional ambivalence increases and tiredness reduces positivity.



JUNE 2020



Sentiment ratio
(negative and positive emotions)

42%



58%



DECEMBER 2020



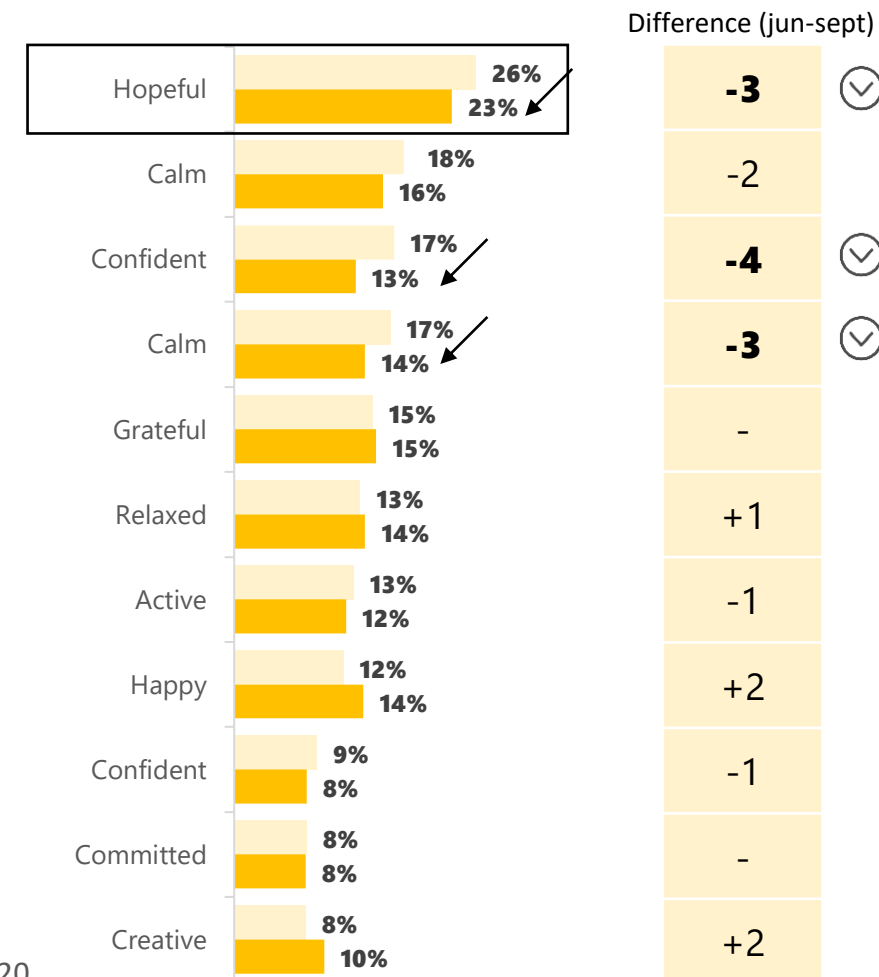
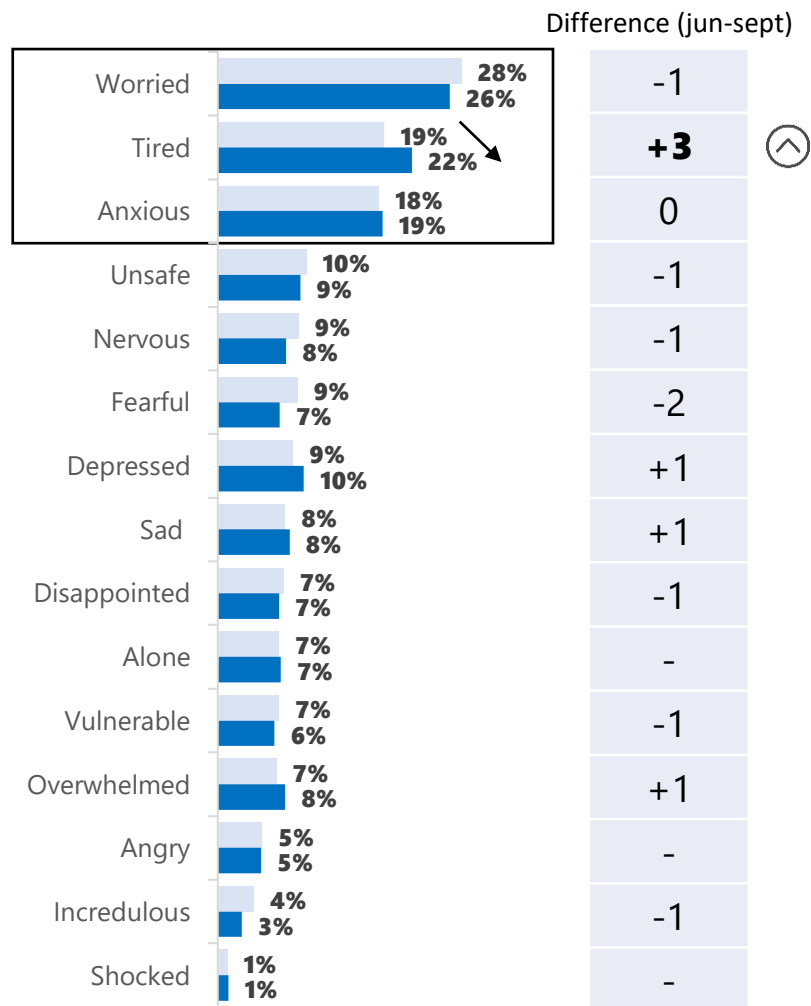
44%



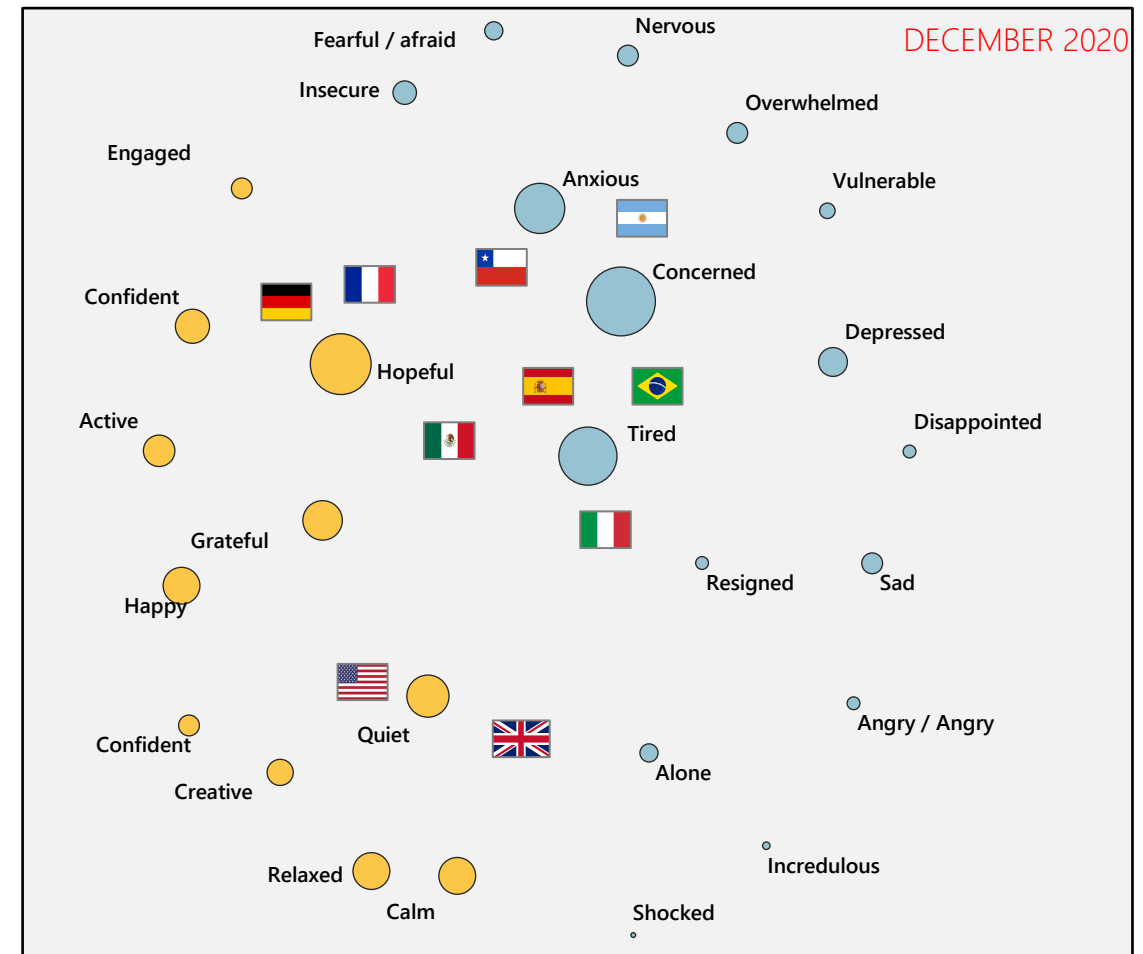
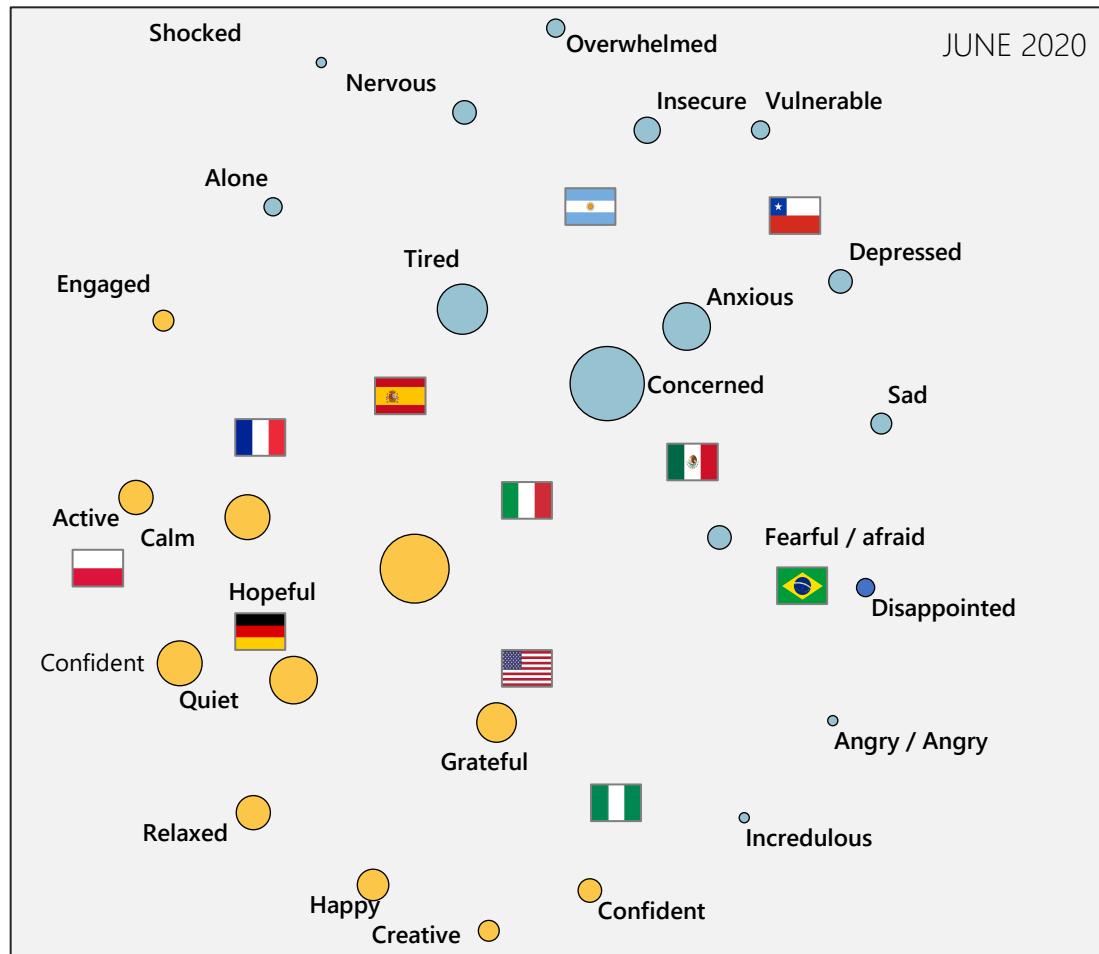
56%



More fatigue, and less confidence, hope or calm.



The emotional dispersion between countries is less than in June... We observe different emotional moods that coexist in each of the countries...



SEMANTIC MAP

5 typologies emerge as a result of the impact of COVID



**The
Insecure and
Concerned**



19%



**The
Angry and
Disappointed**



7%



**The
Sad and Tired**



25%



**The Active
Optimists**



39%



**The
Resigned
Disbelievers**



11%

5 different typologies based on 9 attitudinal components:

1. Affected by the pandemic

COVID has affected me very negatively at work.
I am worried about my future, my personal projects
I find it hard to switch off, I think about COVID all the time.
The COVID has affected me negatively on an emotional level, I don't know if I will be able to endure any more flare-ups.
COVID has changed my priorities
I can't stand not being able to hug my family and friends, I do but it's hard for me.
The COVID has turned my life upside down.

2. Involvement and trust

We have to accept the constraints to flatten the curve.
This is not easy for anyone. Politicians and rulers do the best they can.
I carefully follow all required rules against COVID and get angry with those who break them.
I am very confident in the progress of vaccines.

3. Denial

We have to continue as normal as possible, we cannot live in fear all the time.
I think people are overly concerned about COVID. In my opinion, the risks have been exaggerated.
So many restrictions will lead to an economic crisis that will be worse than COVID itself.

4. Social activity

Activities to be carried out when this is finished:

- Spending time with friends
- Traveling abroad
- Travel within the country
- Traveling by air
- Go to the mall
- Go to festivals/concerts
- Going to the cinema/theater
- Going to bars / restaurants
- Lunch or dinner out
- Going to the gym
- Buy clothes and accessories / fashion

5. I stay at home

Activities to be carried out when this is finished:

- Teleworking / working from home
- Online trainings / Participate in online courses
- Buy household items online
- Buy food products online
- Shopping in stores close to home, in the neighborhood
- Have products or food brought to my home (delivery)

6. Social responsibility

Activities to be carried out when this is finished:

- Spending time with the family
- Following a healthy and balanced diet
- Buy organic products
- Recycling and reusing things
- Shopping in stores close to home, in the neighborhood
- Use my own vehicle, bicycle, etc.

7. Individual mobility

Activities to be carried out when this is finished:

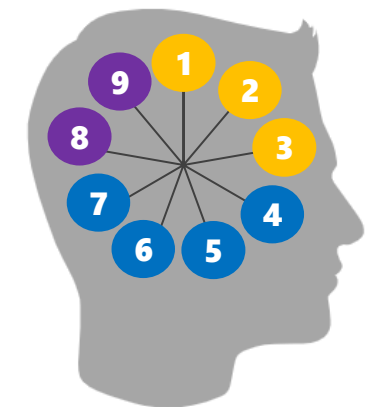
- Doing sports
- Use public transportation
- Walking / walking

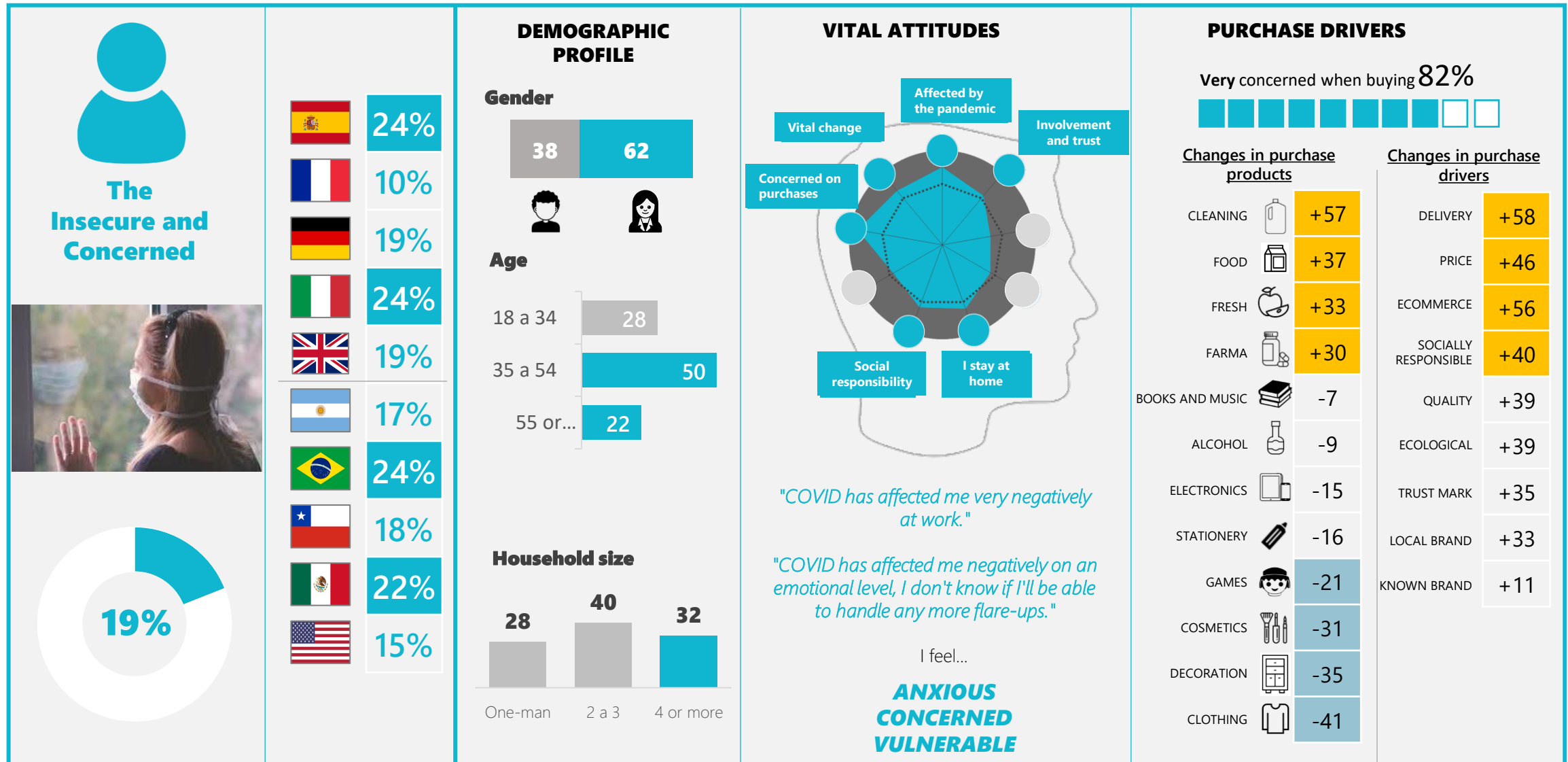
8. Concern

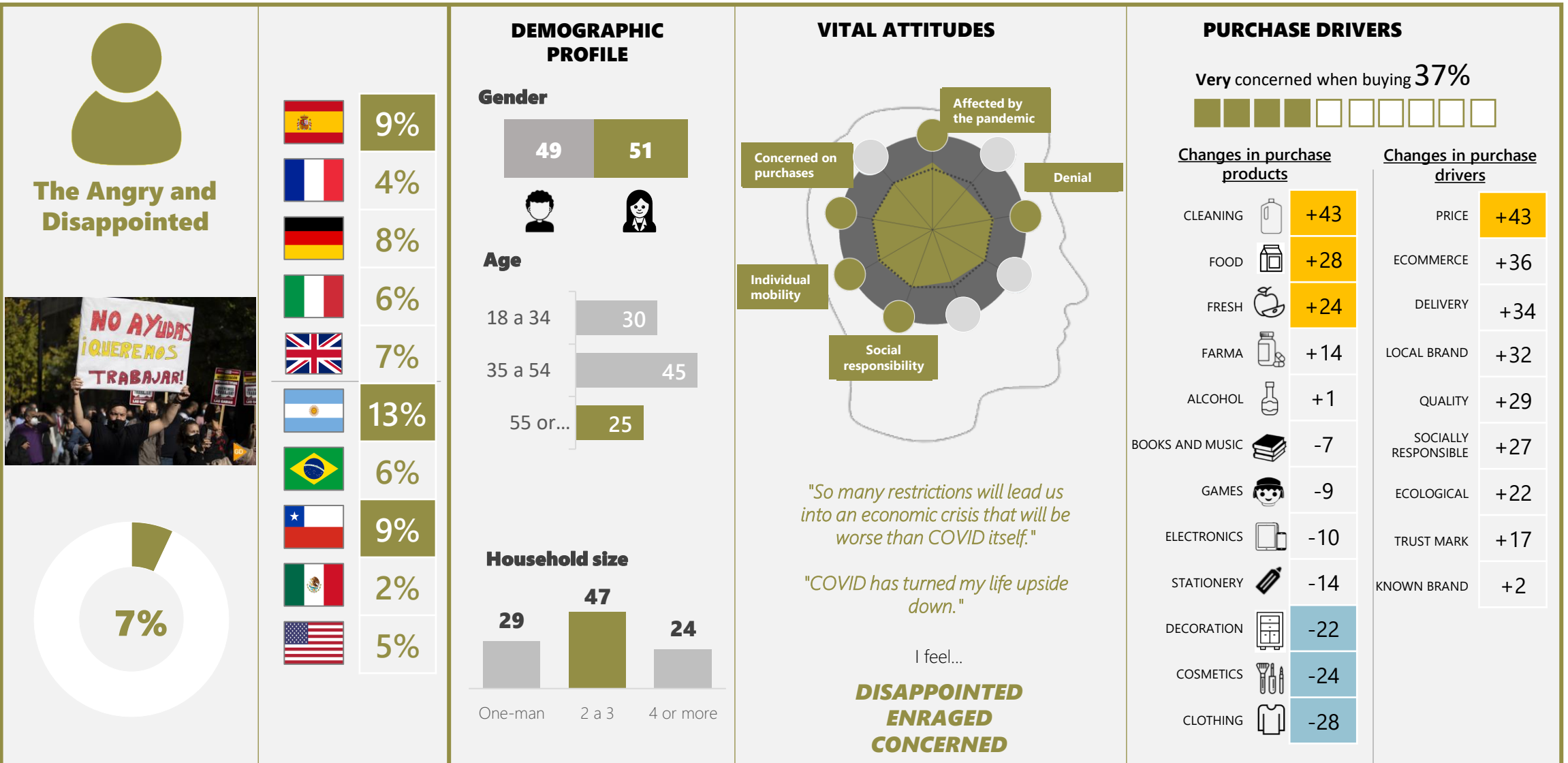
When I go to the supermarket, I worry about the possibility of being exposed to the coronavirus.

9. Vital change

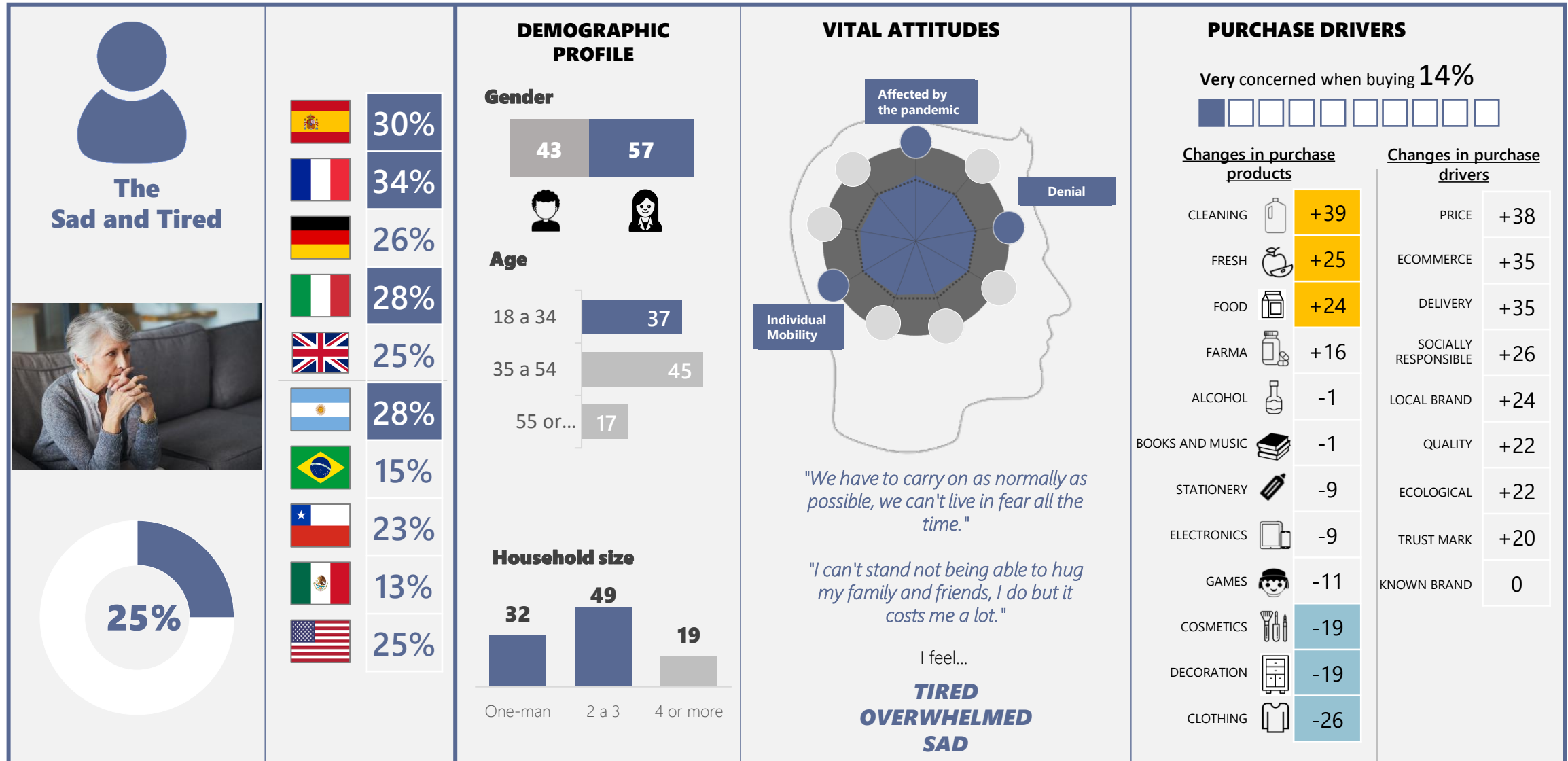
COVID-19 will completely change our lives



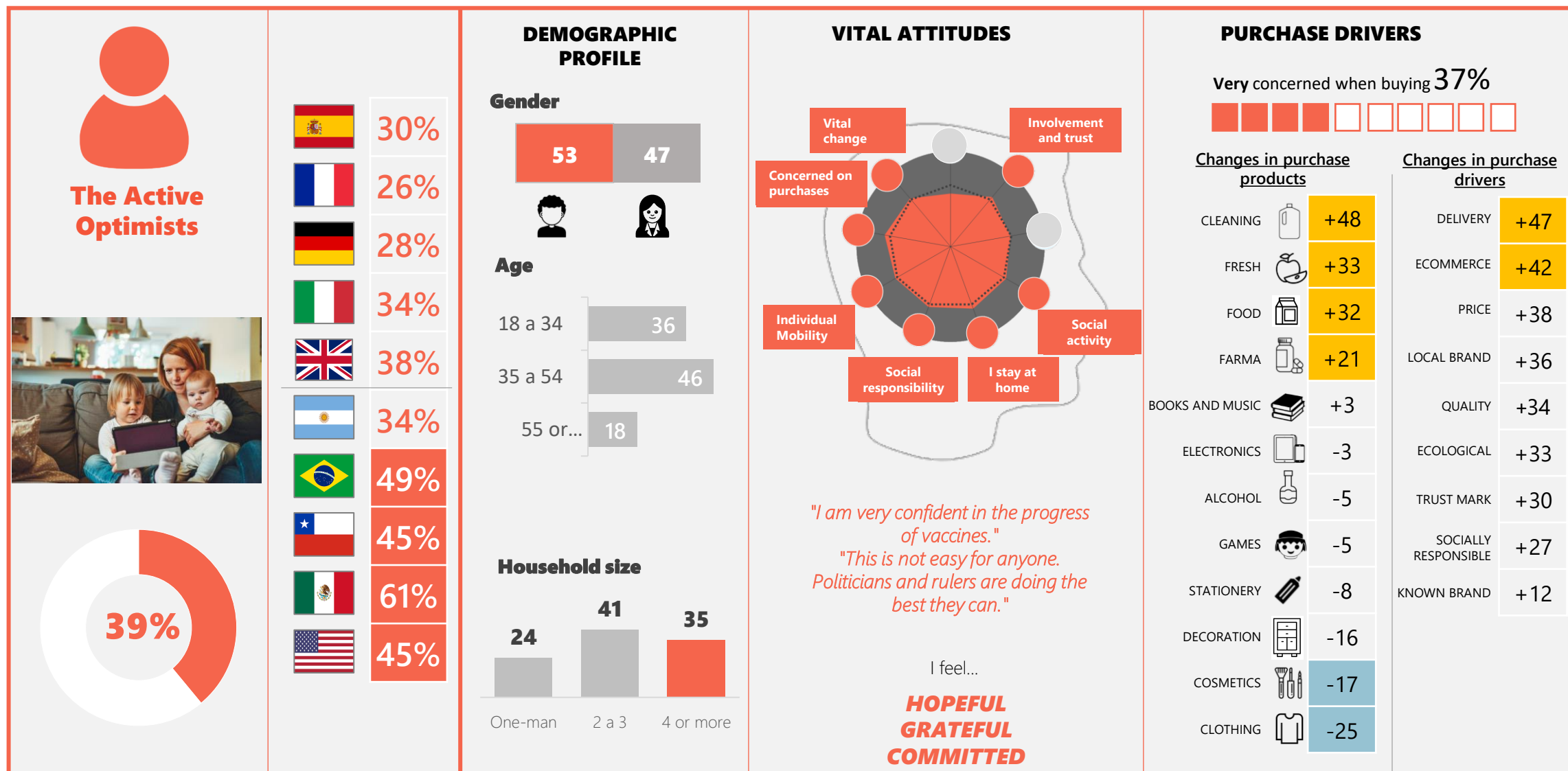




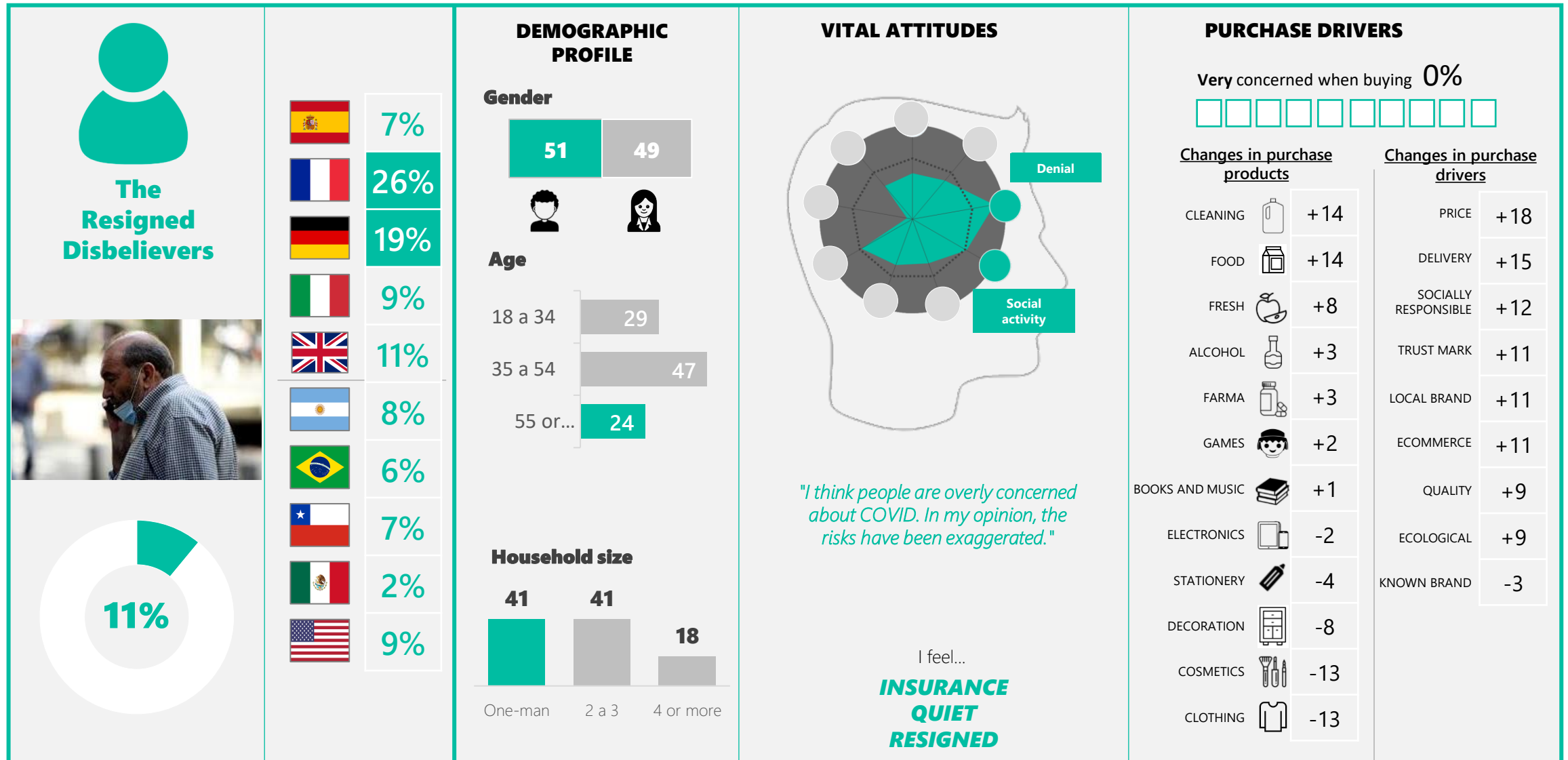
Nearly a year in pandemic: DIVERSE EMOTIONAL EXPERIENCES



Nearly a year in pandemic: DIVERSE EMOTIONAL EXPERIENCES



Nearly a year in pandemic: DIVERSE EMOTIONAL EXPERIENCES



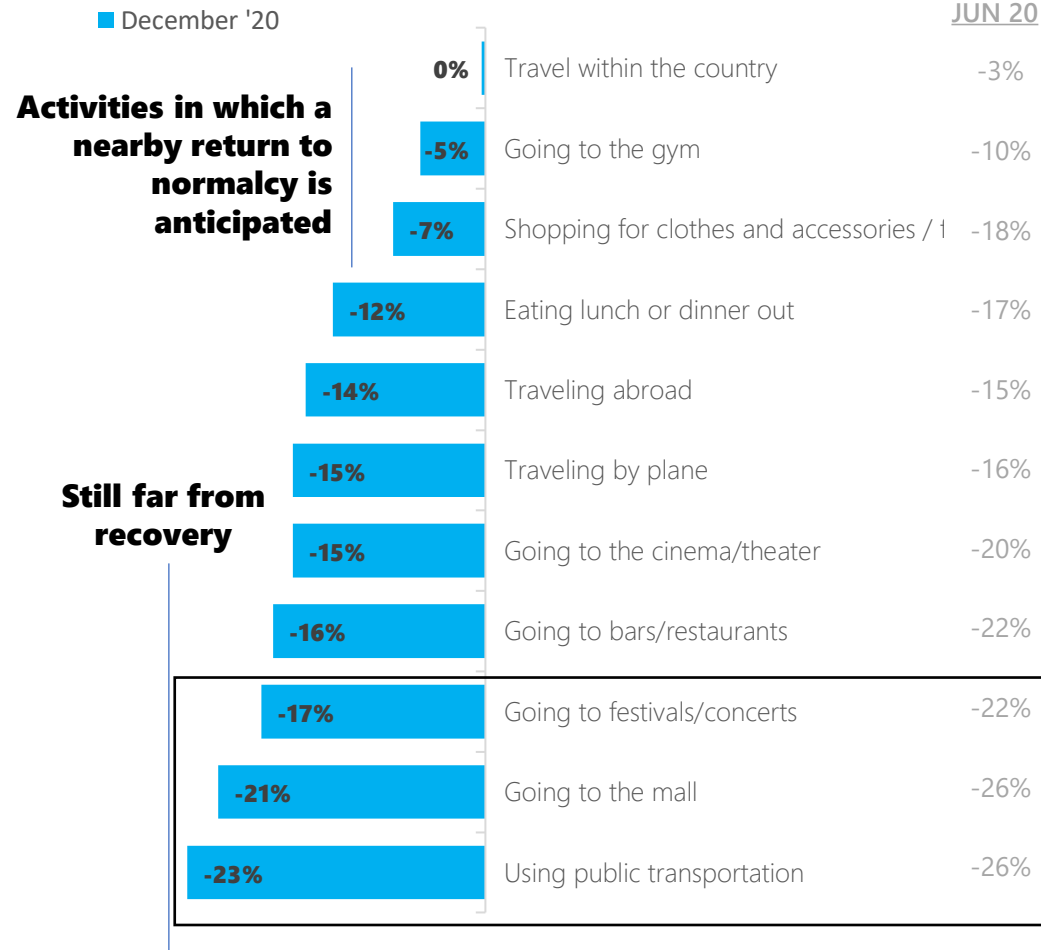


A 'New Normal' consolidates

A new normal consolidates

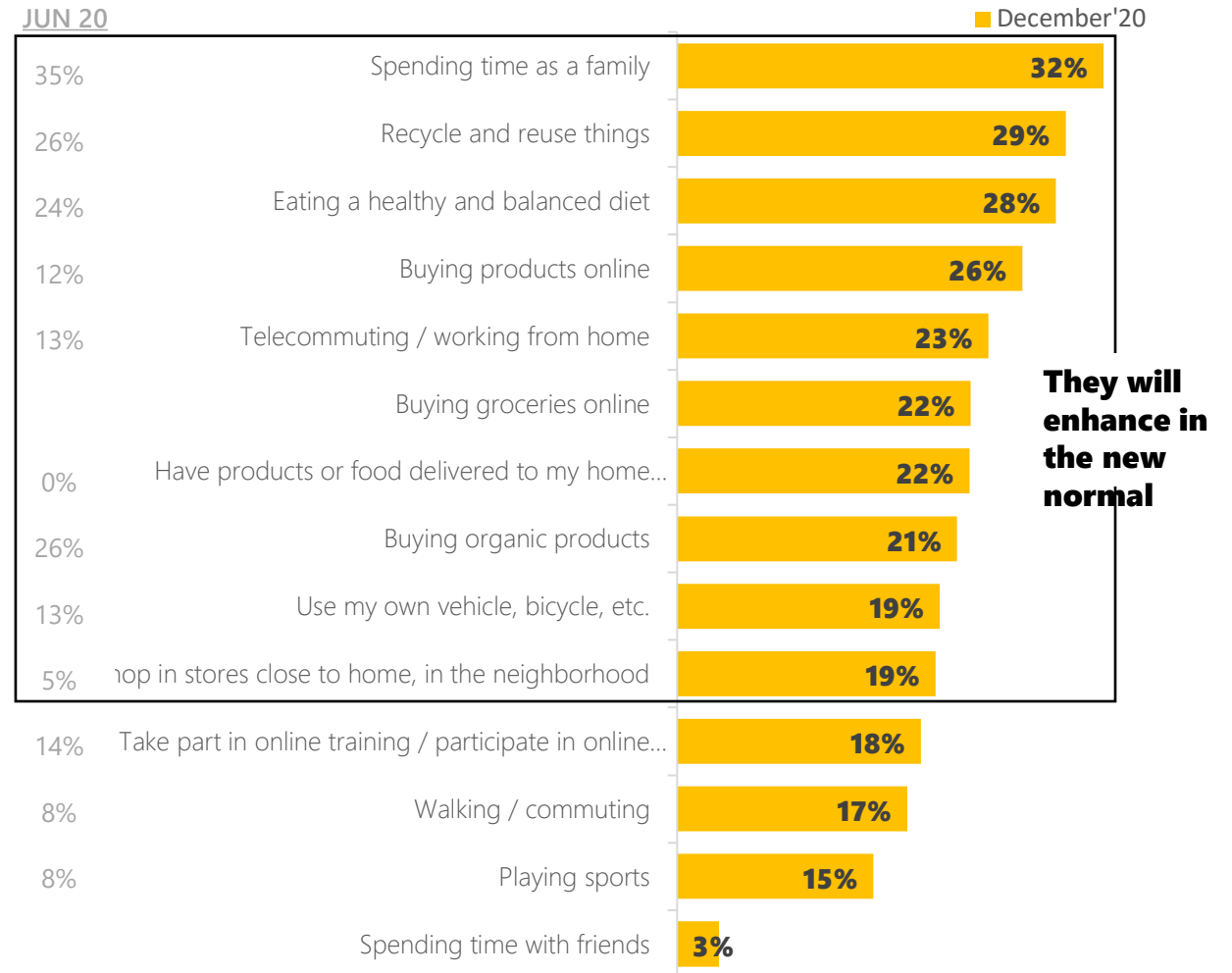
What activities will we stop doing?

Perceived % Variation
(More than before - Less than before)



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

What activities will we practice the most?



Personal relationships



Spending time with the family

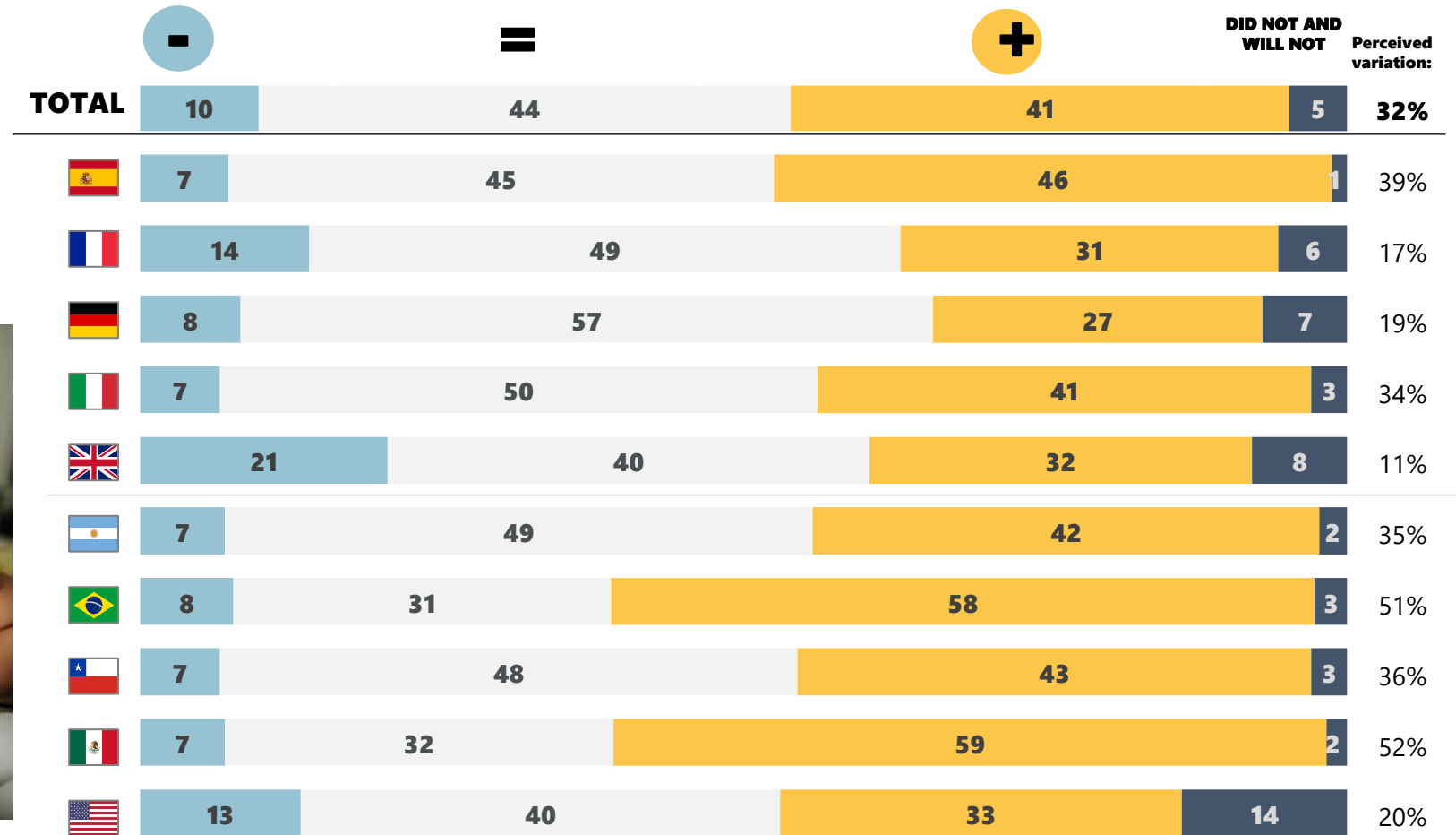
June 2020

December 2020

+35%

+32%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Personal relationships



Spending time with friends

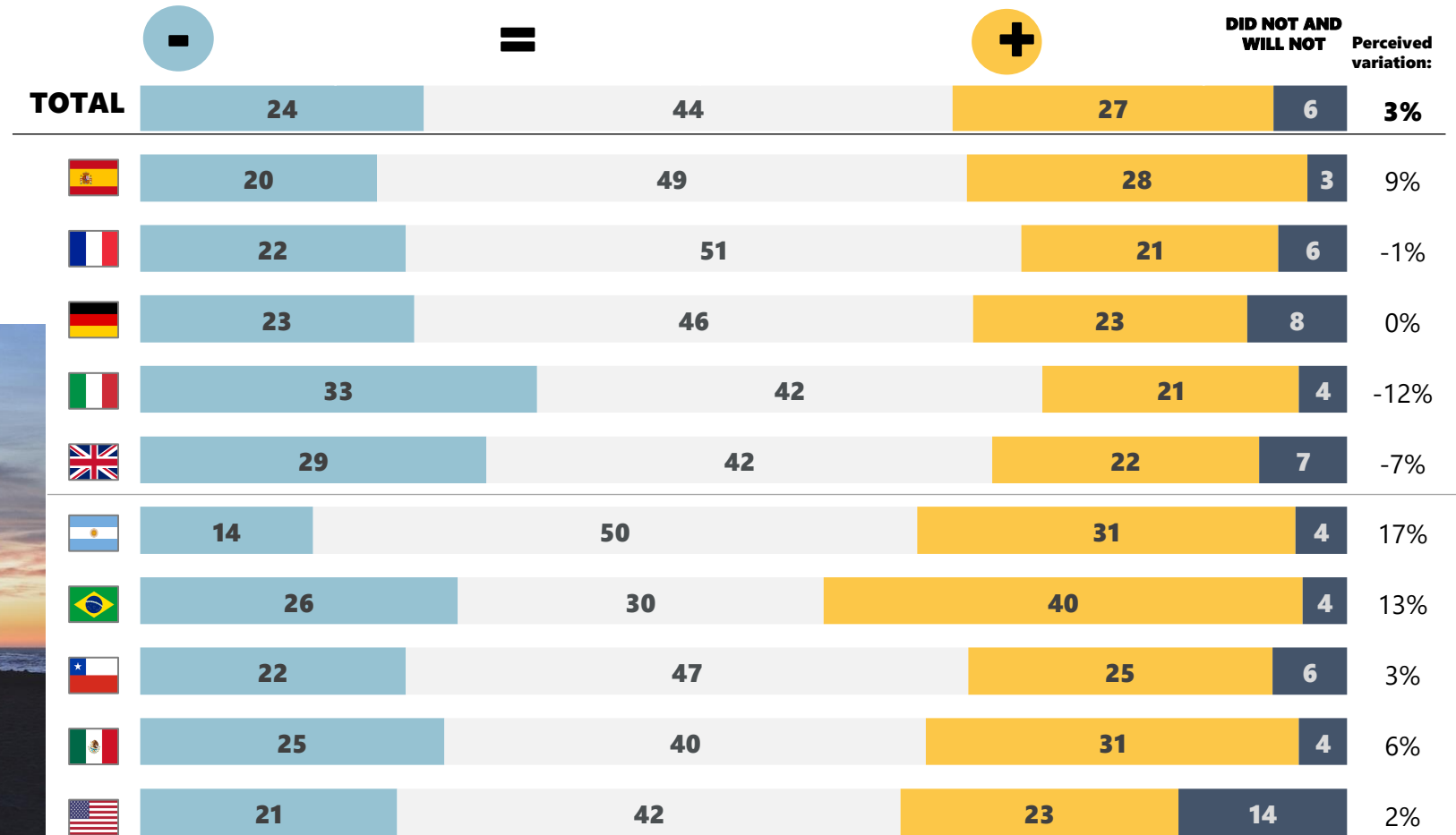
June 2020

December 2020

+6%

+3%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

E-Occupation

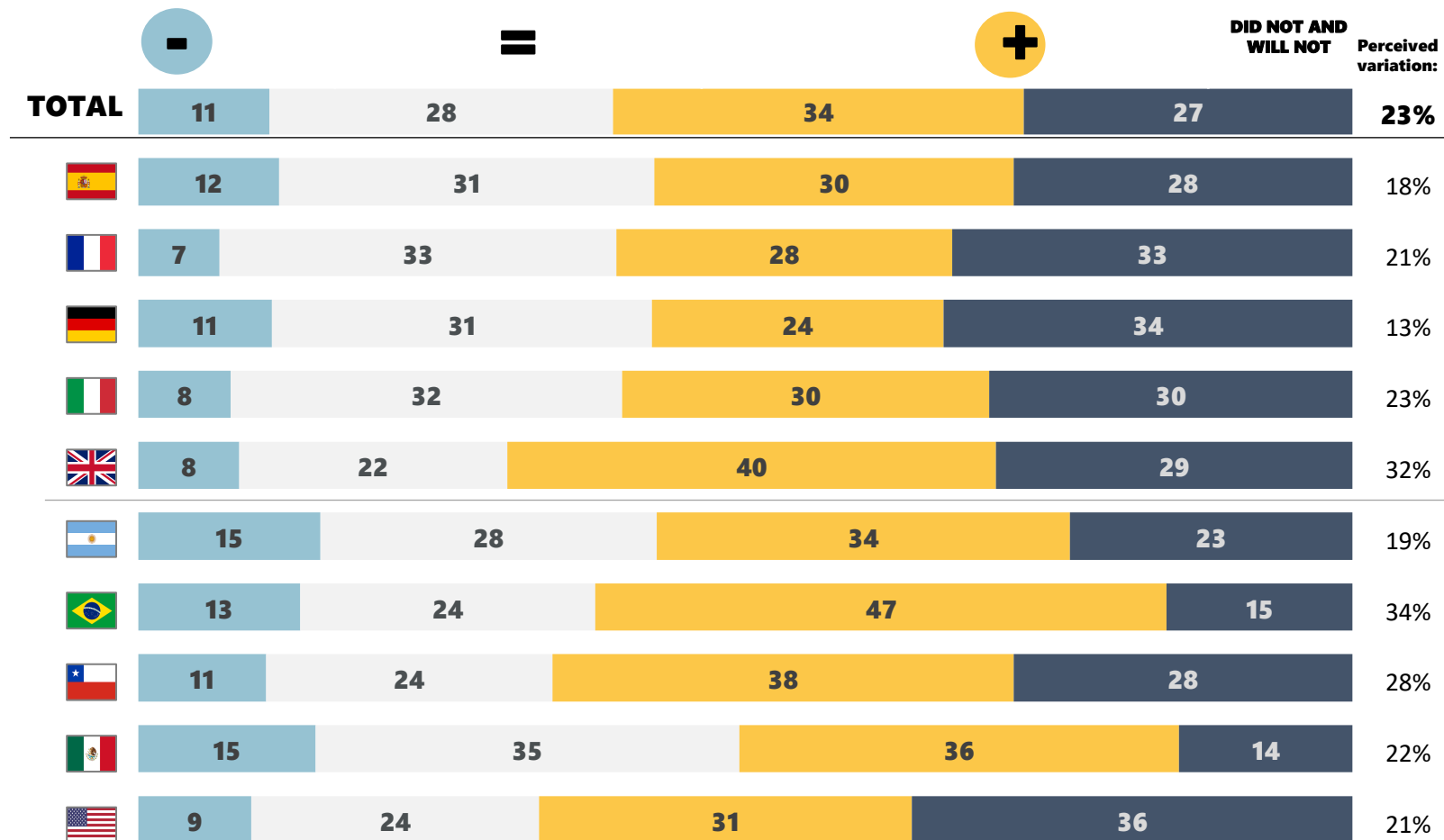


Working from home

June 2020
+13%

December 2020
+23%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

E-Occupation



**Online training /
Participate in online
courses**

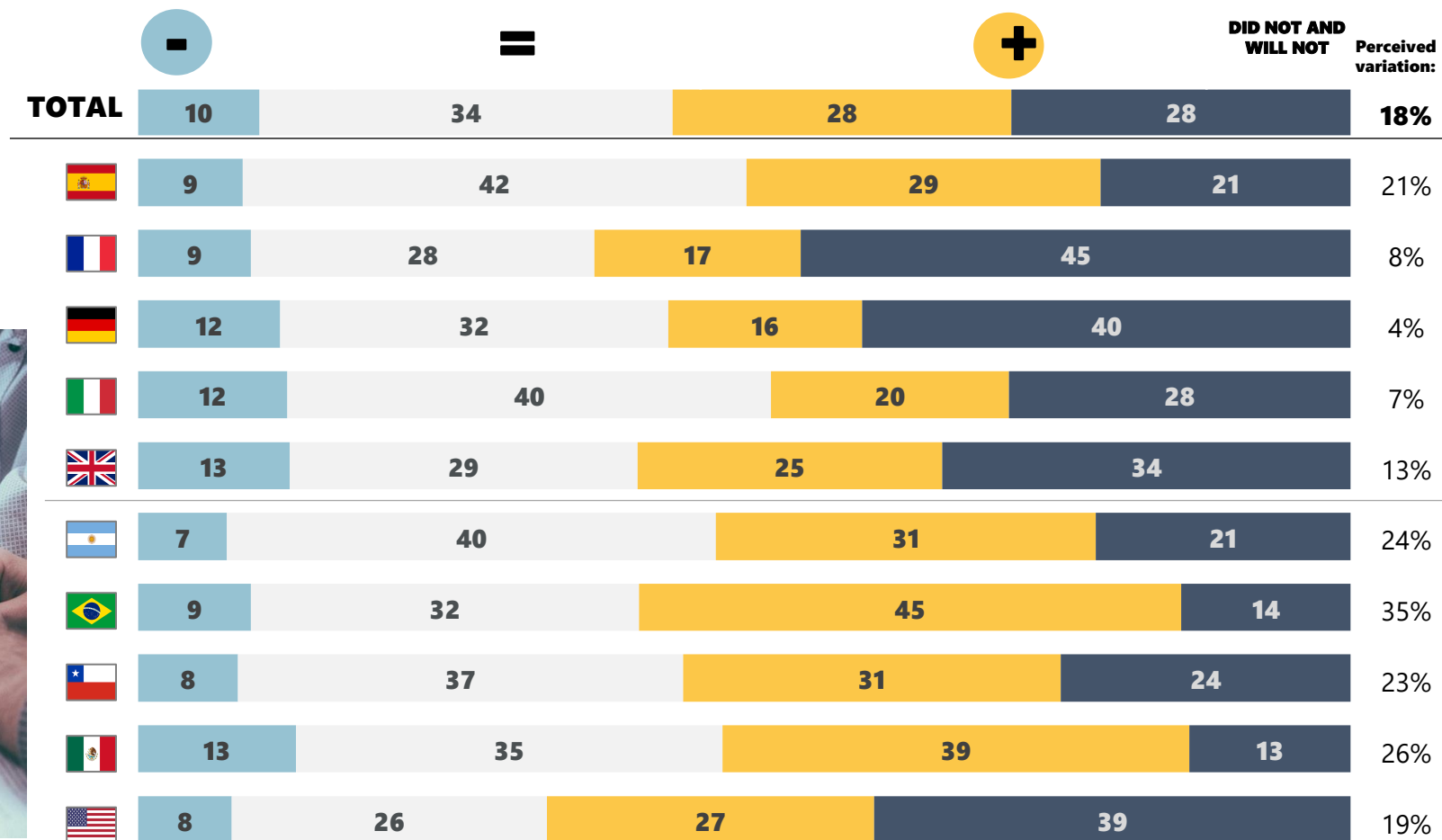
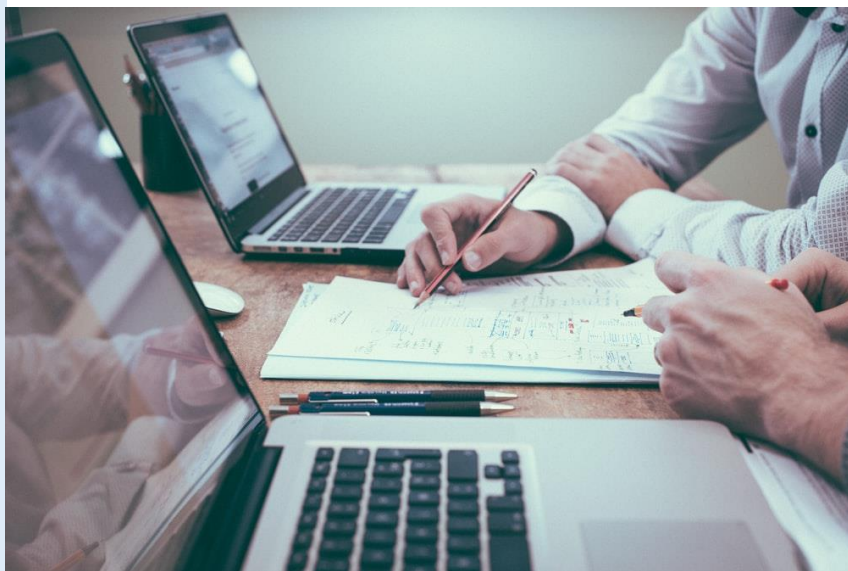
June 2020

December 2020

+14%

+18%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Shopping

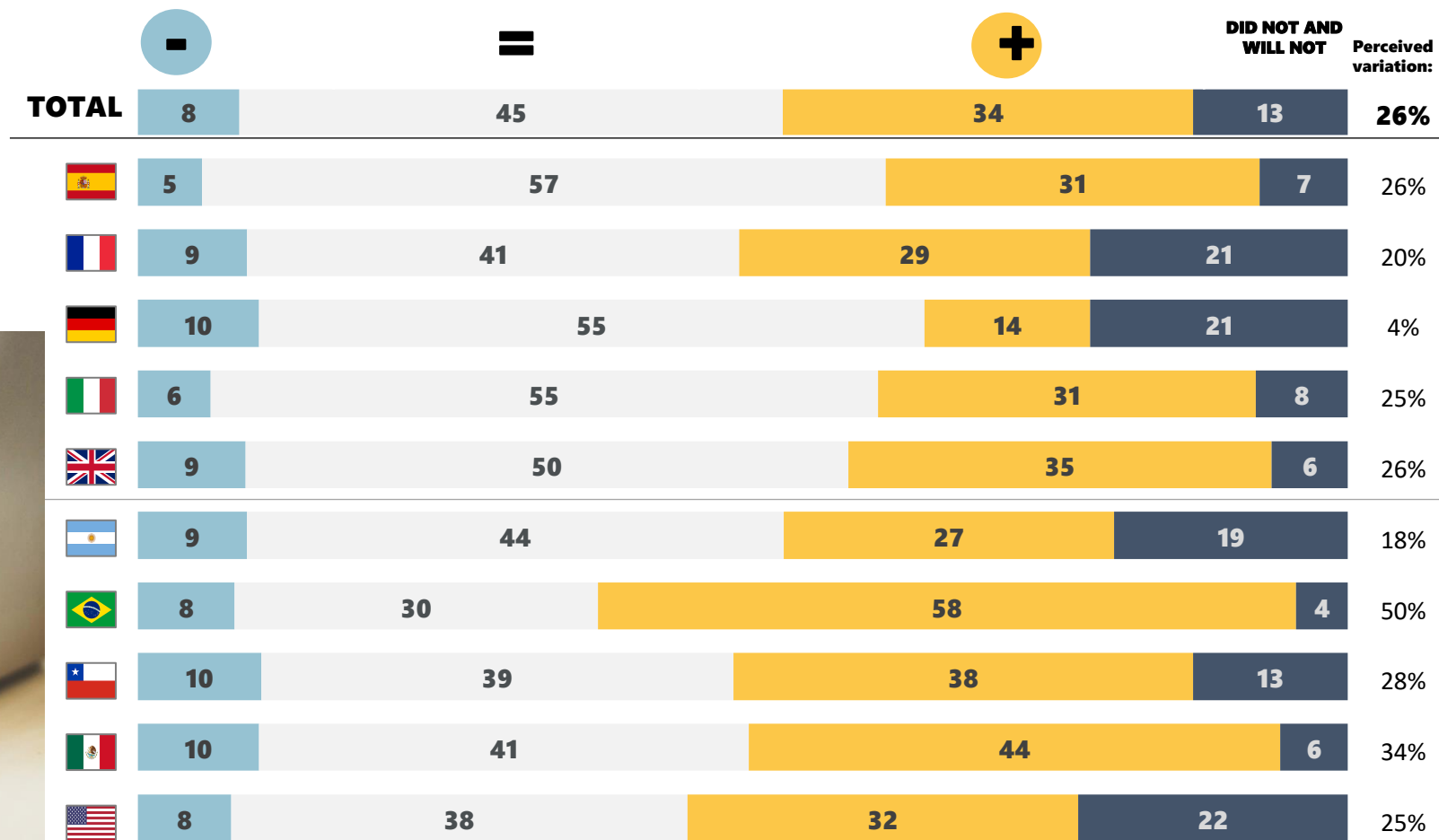


**Buy products
online**

June 2020
+12%

December 2020
+26%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Shopping



**Buy food products
online**

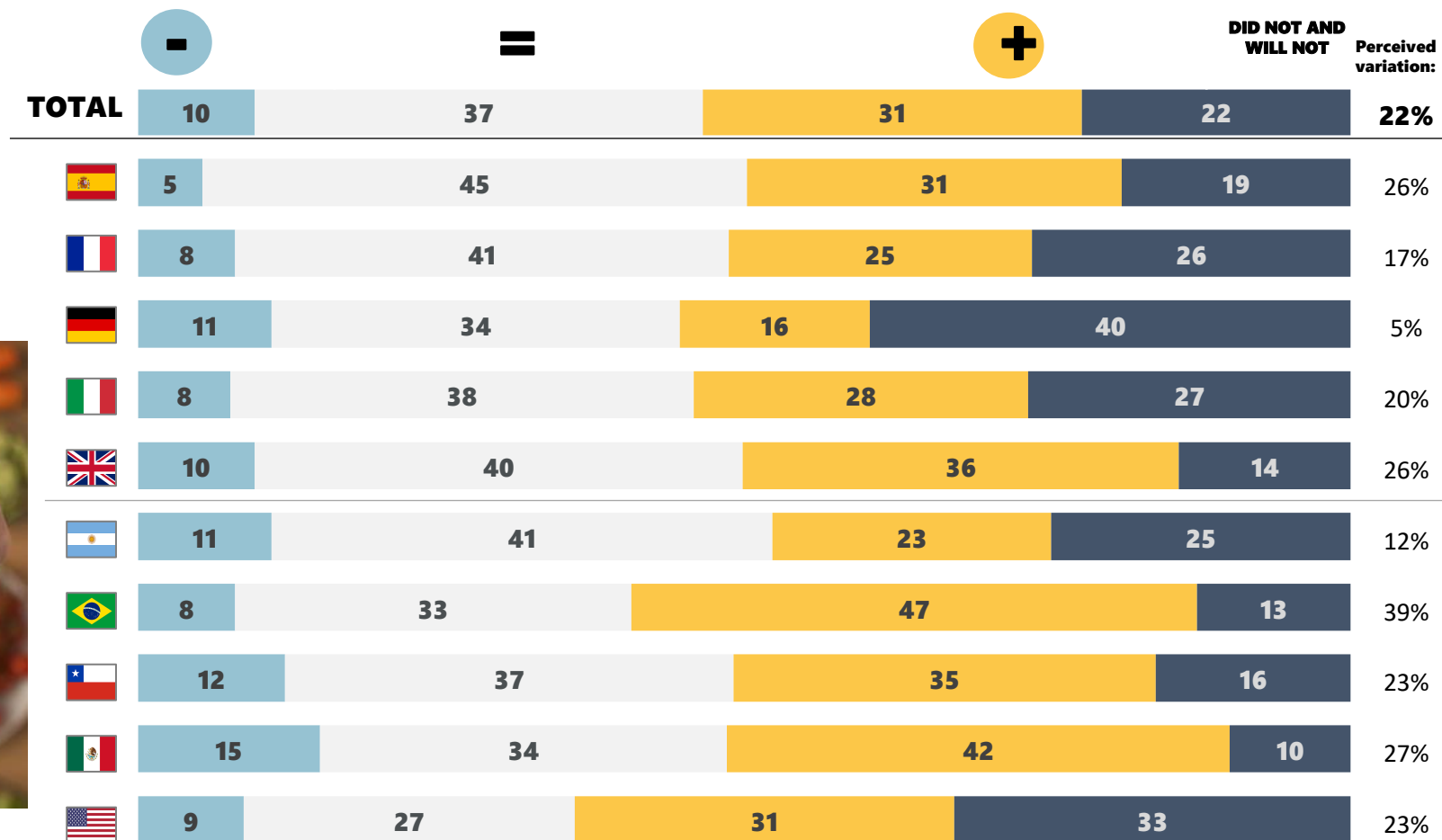
June 2020

+3%

December 2020

+22%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Shopping



Have products or food brought to my home (delivery)

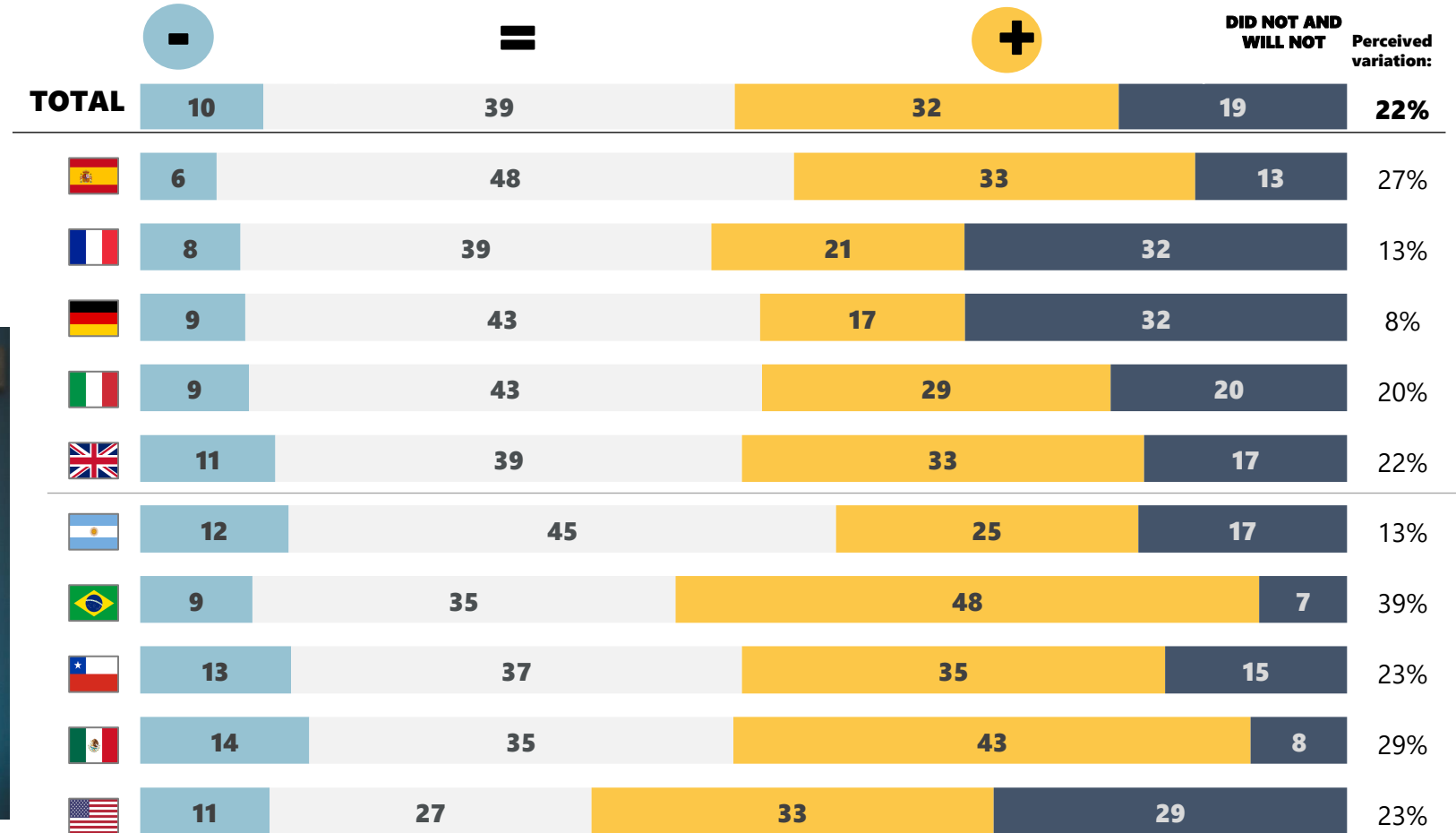
June 2020

+0%

December 2020

+22%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Shopping



**Shopping in stores
close to home, in
the neighborhood**

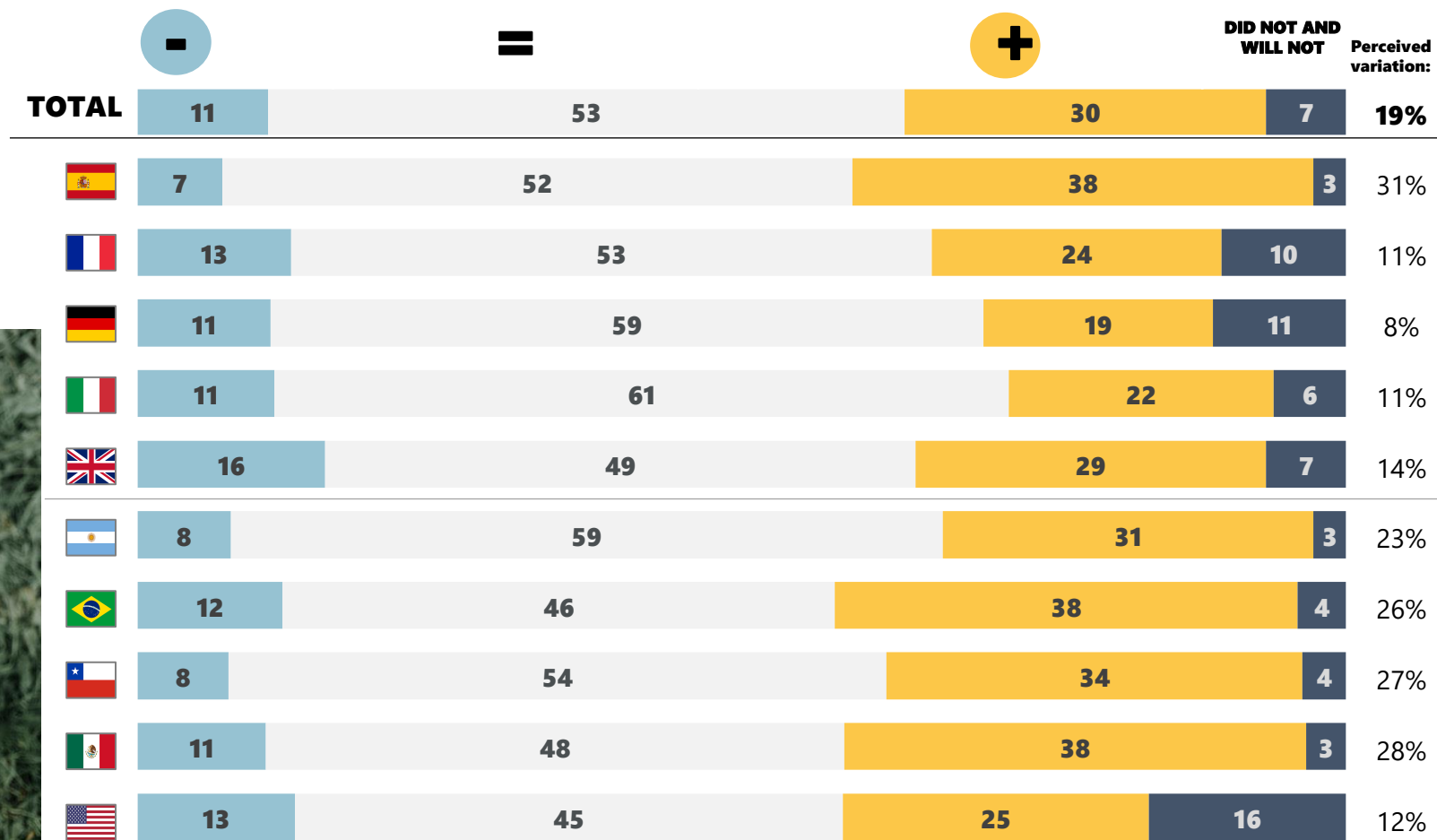
June 2020

December 2020

+5%

+19%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Health and care



**Buy
organic
products**

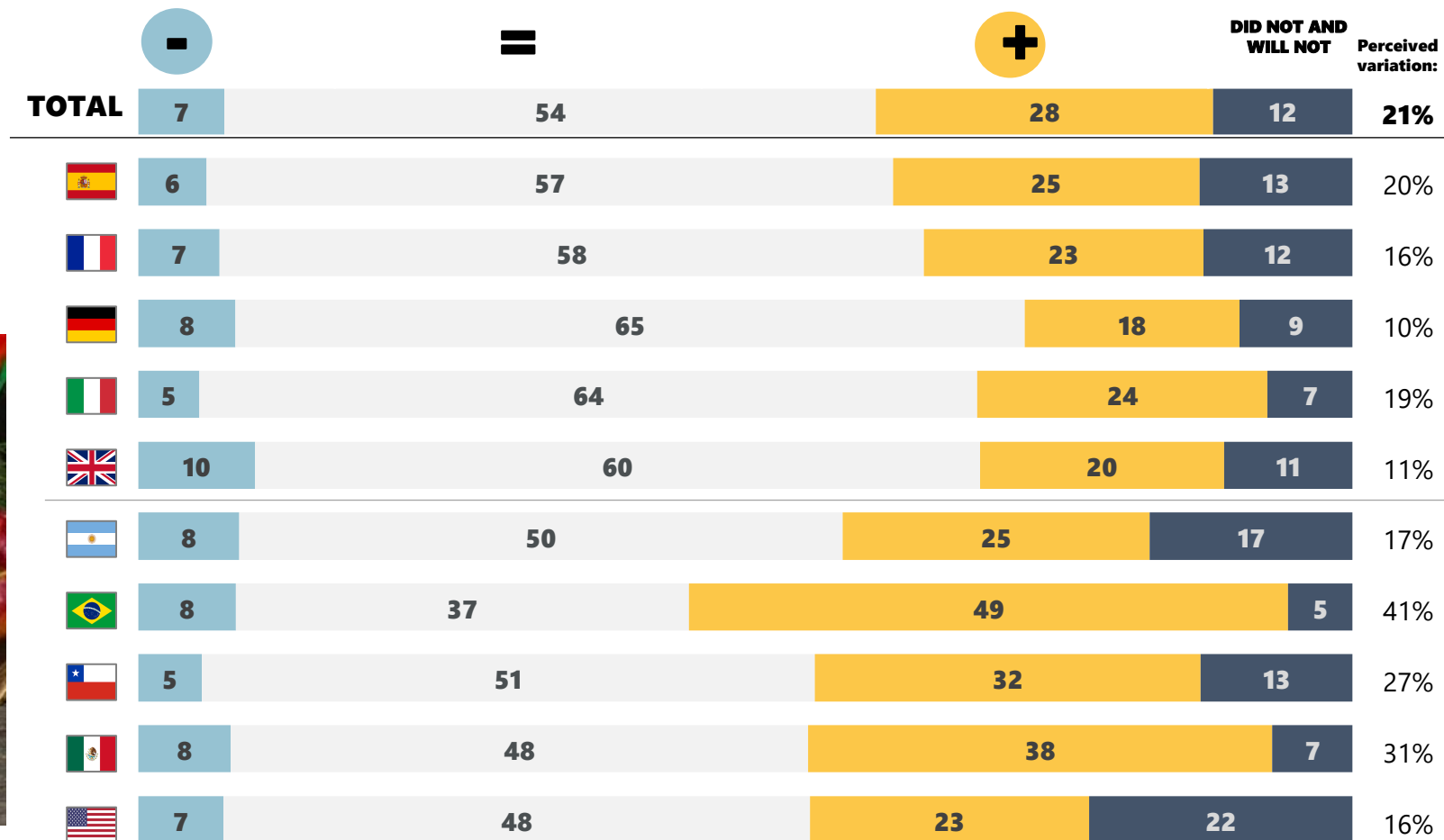
June 2020

+26%

December 2020

+21%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Health and care



Follow a healthy and balanced diet

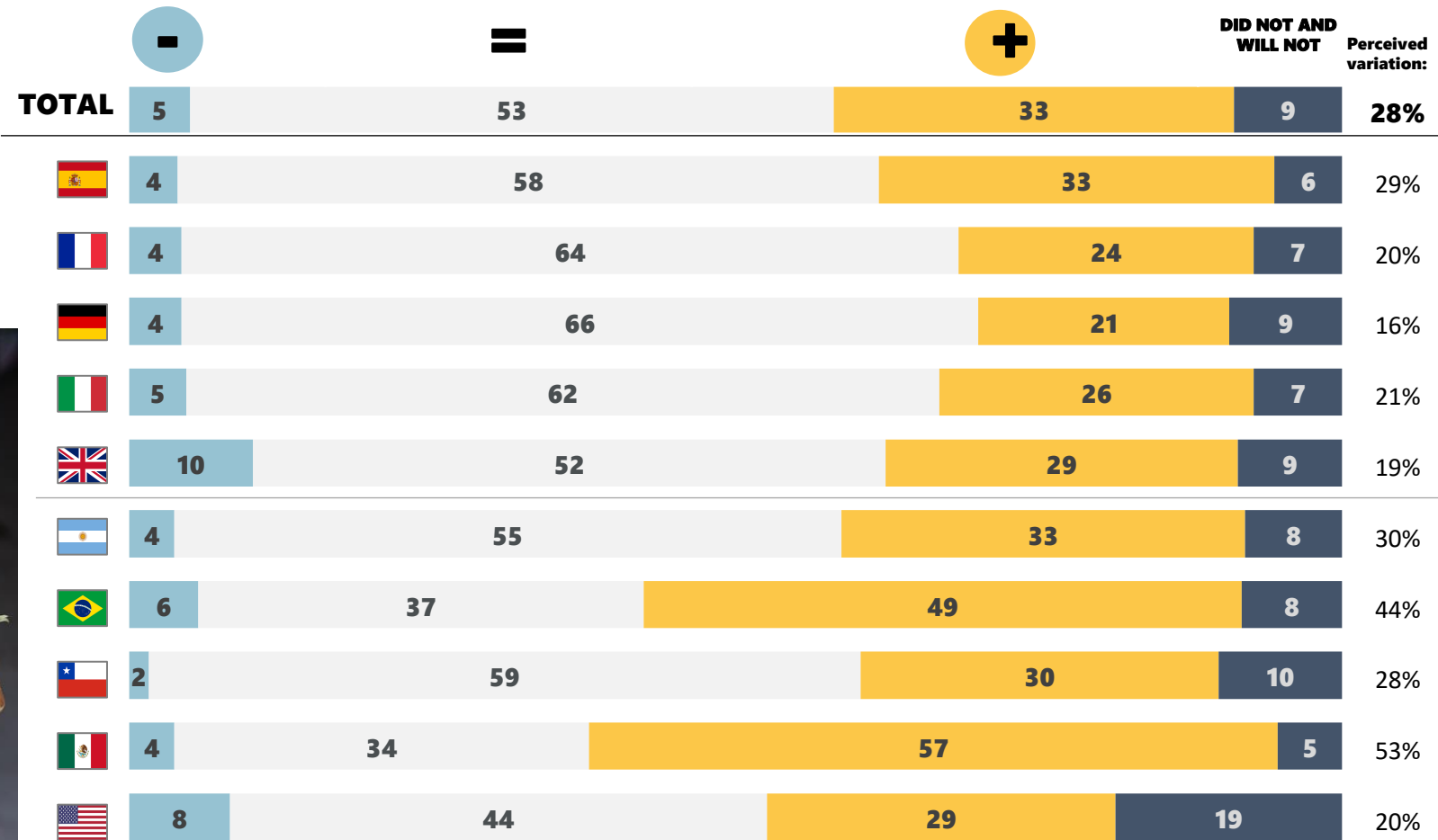
June 2020

December 2020

+24%

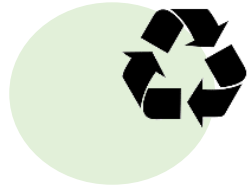
+28%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Health and care



Recycling
and reusing
things

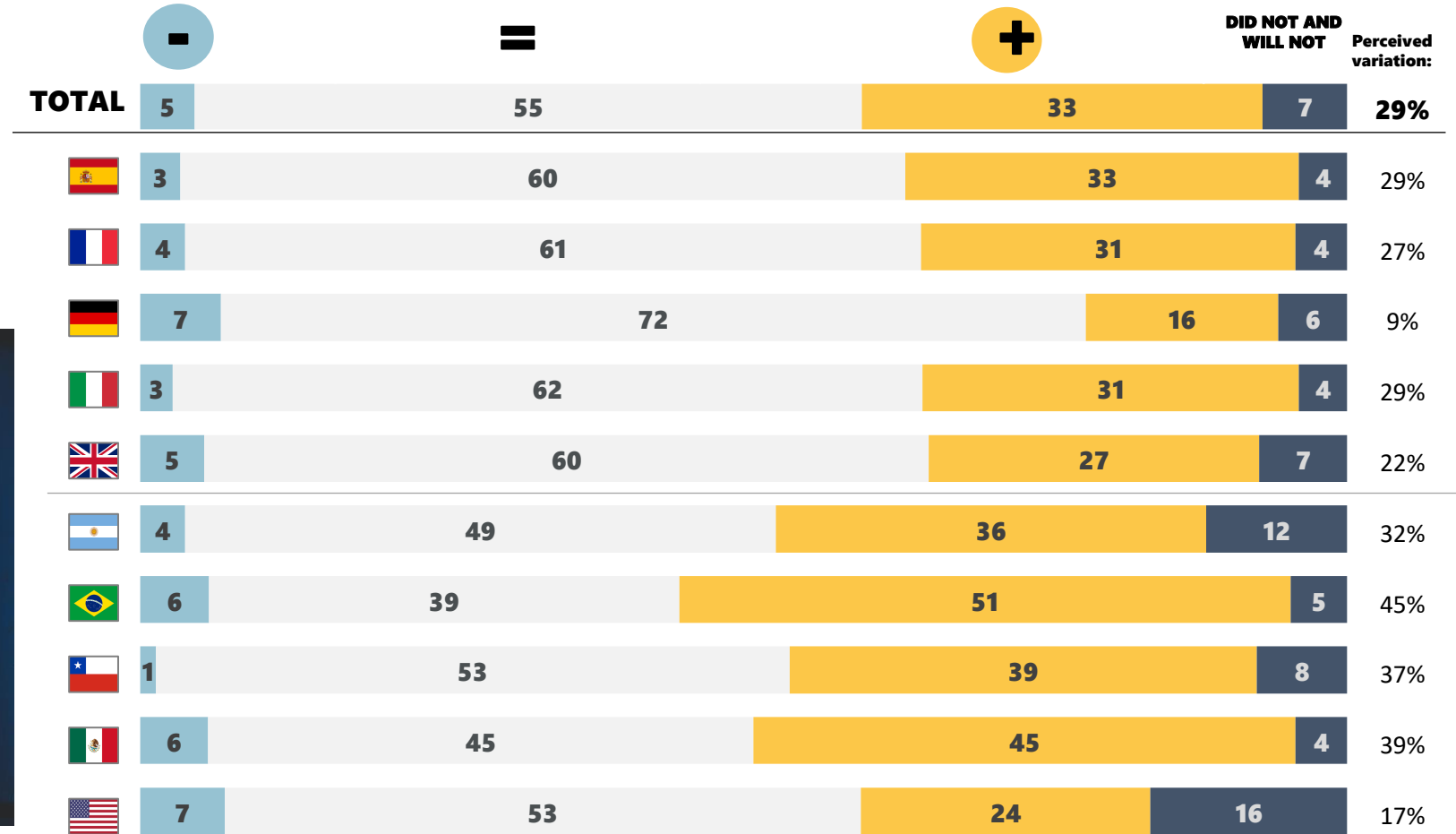
June 2020

+26%

December 2020

+29%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Health and care



Doing sports

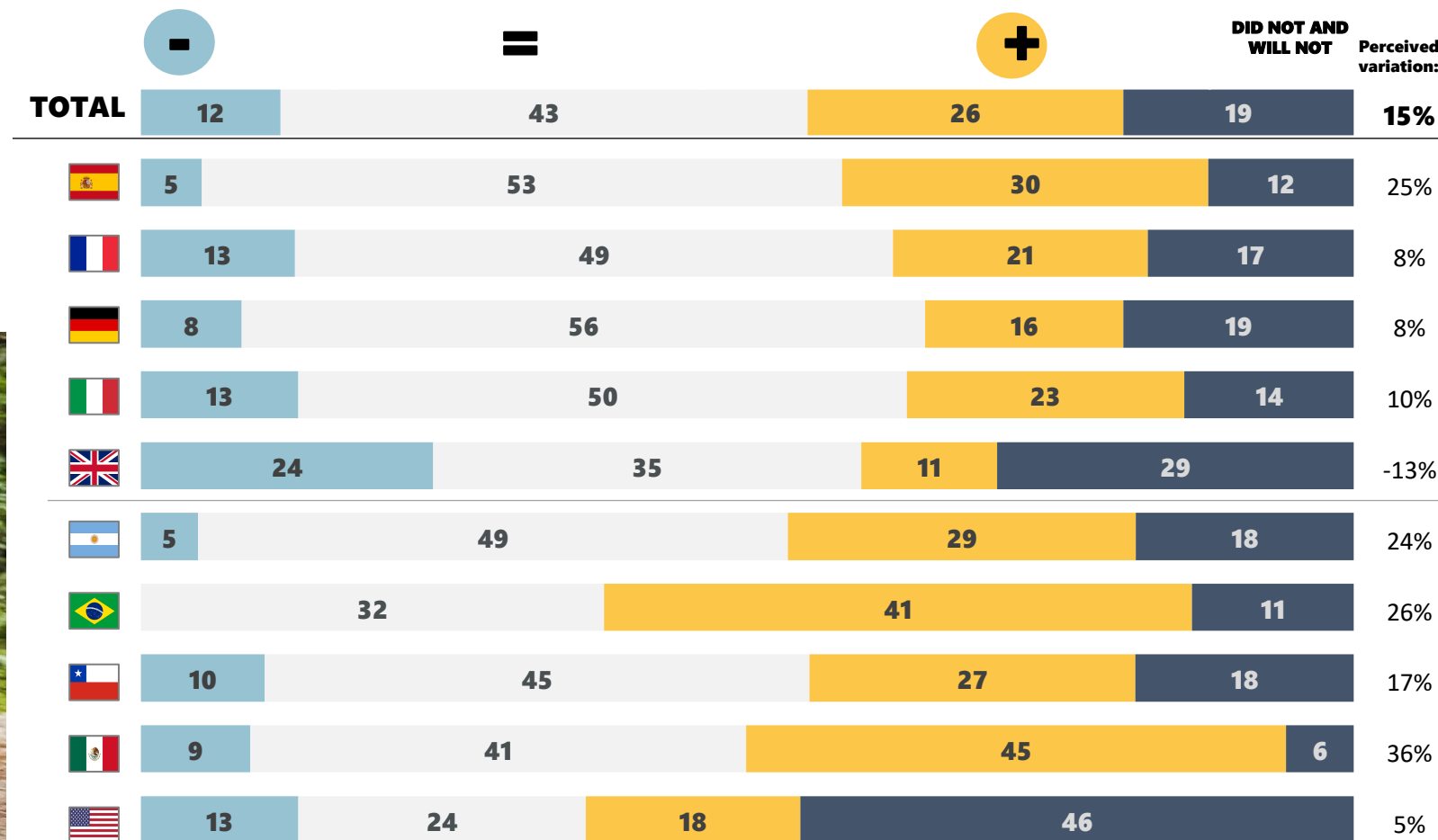
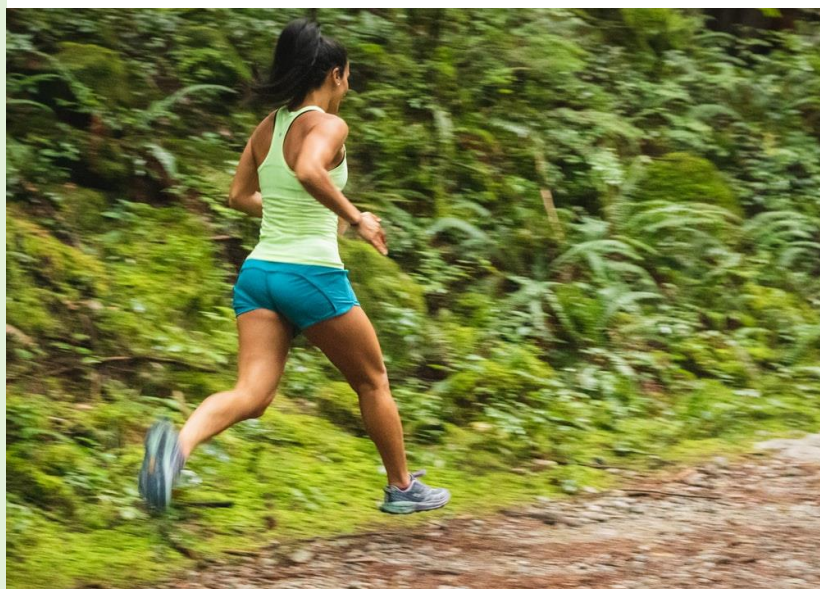
June 2020

+8%

December 2020

+15%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Mobility



**Walking, moving
around by foot**

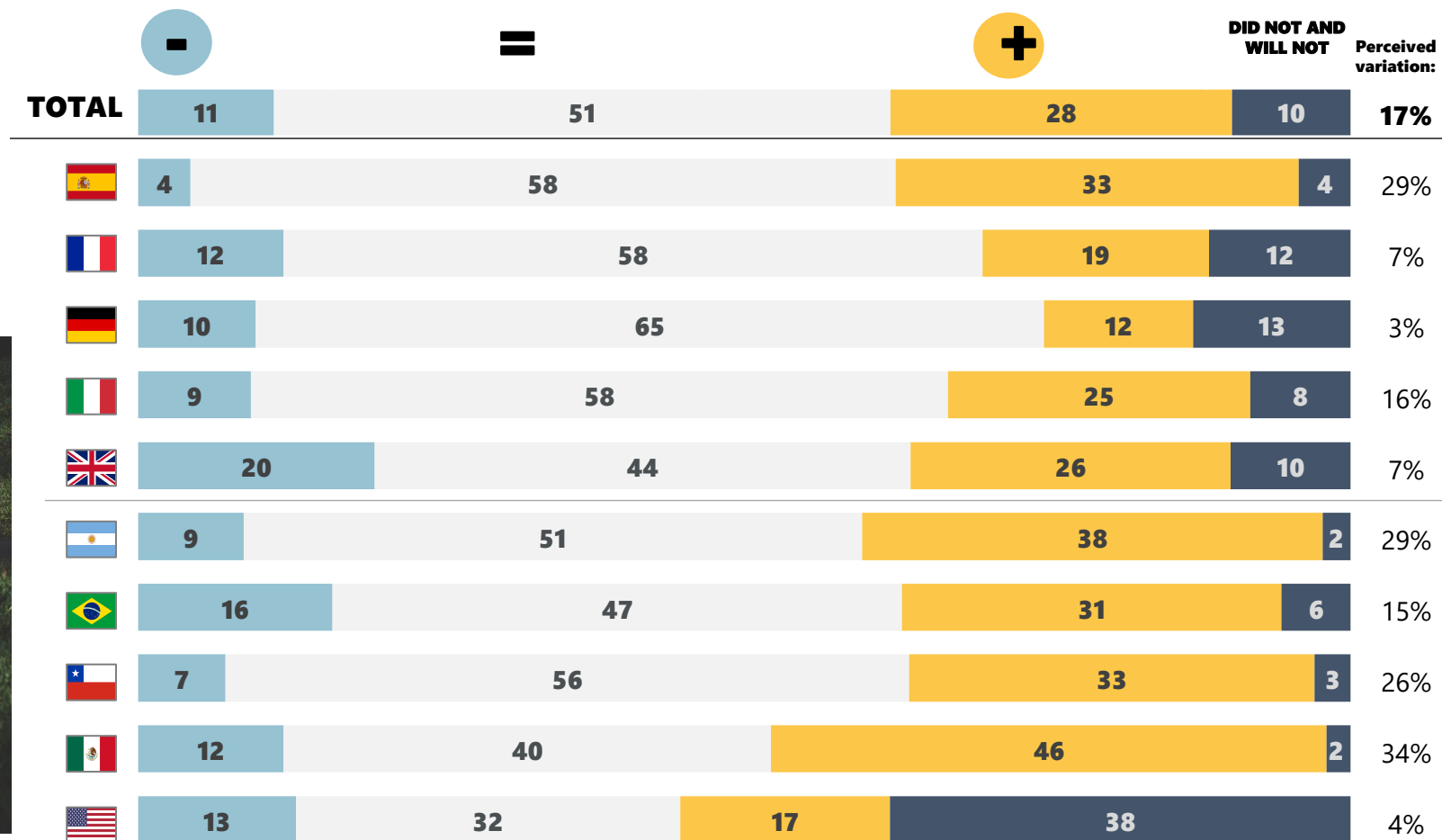
June 2020

+8%

December 2020

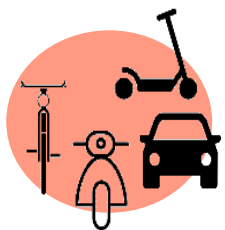
+17%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Mobility



Use my own
vehicle

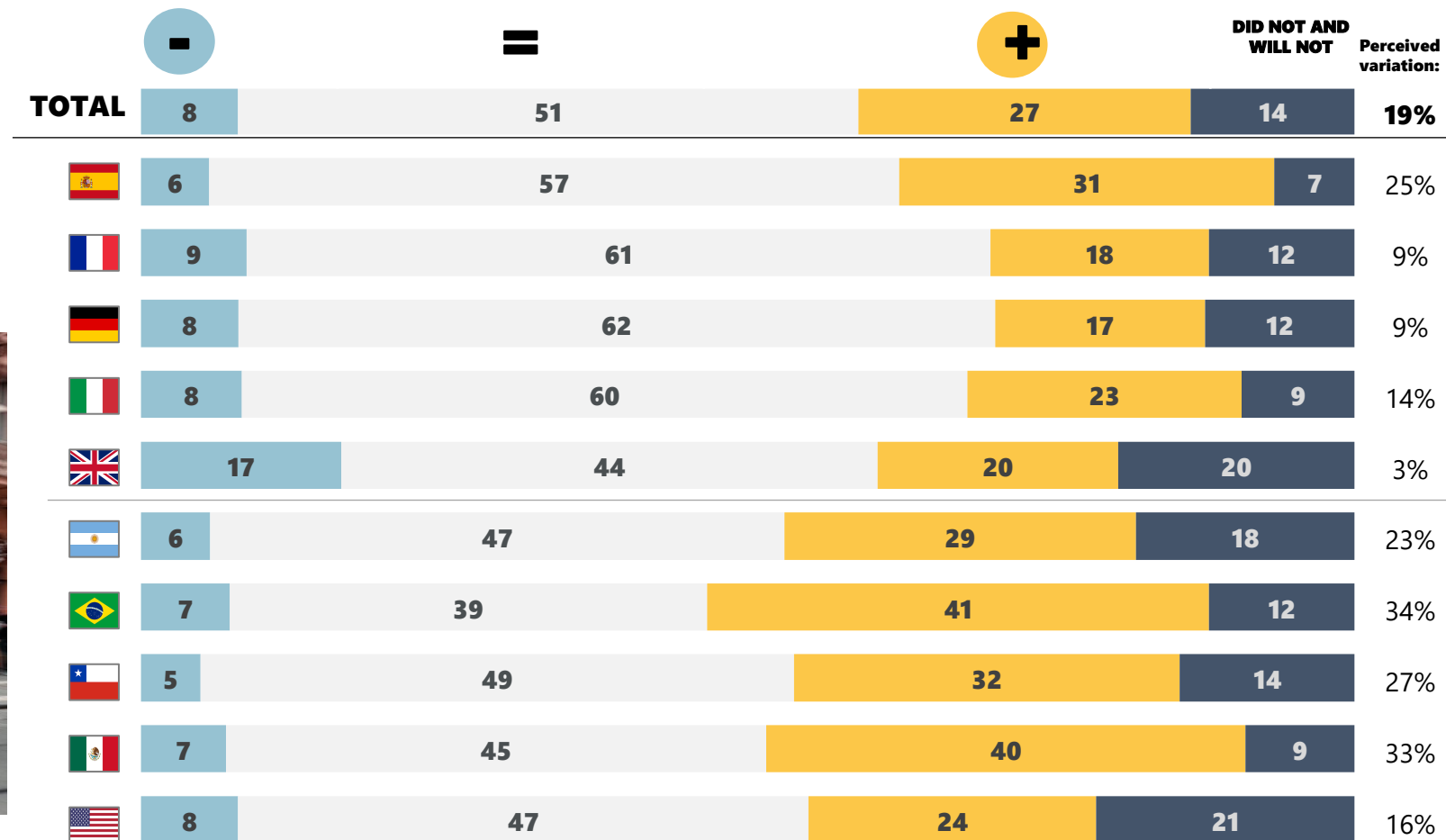
June 2020

+13%

December 2020

+19%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Mobility



Use public transportation

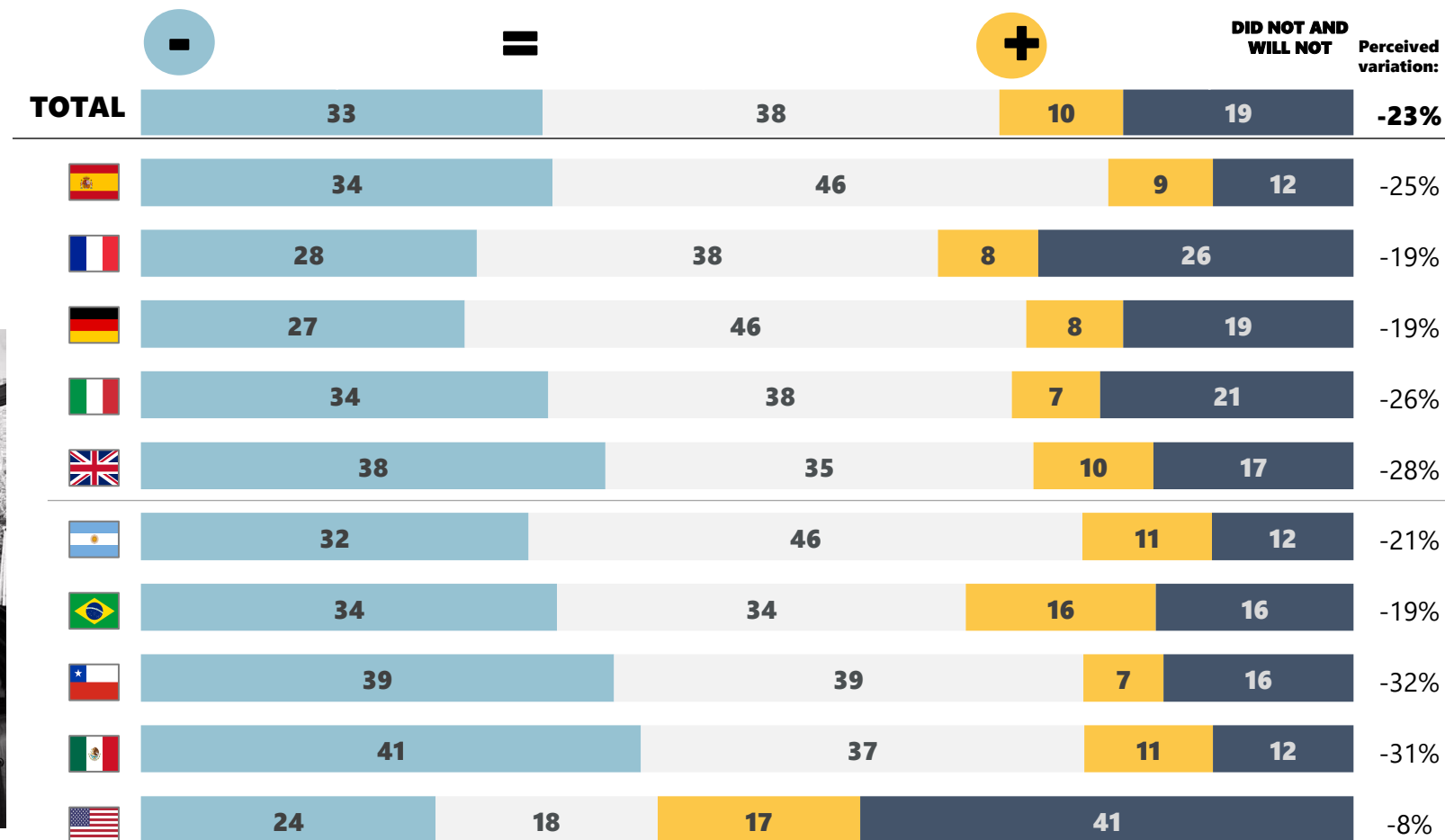
June 2020

-26%

December 2020

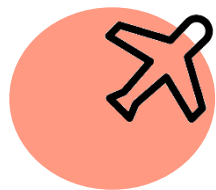
-23%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Mobility



Traveling by
plane

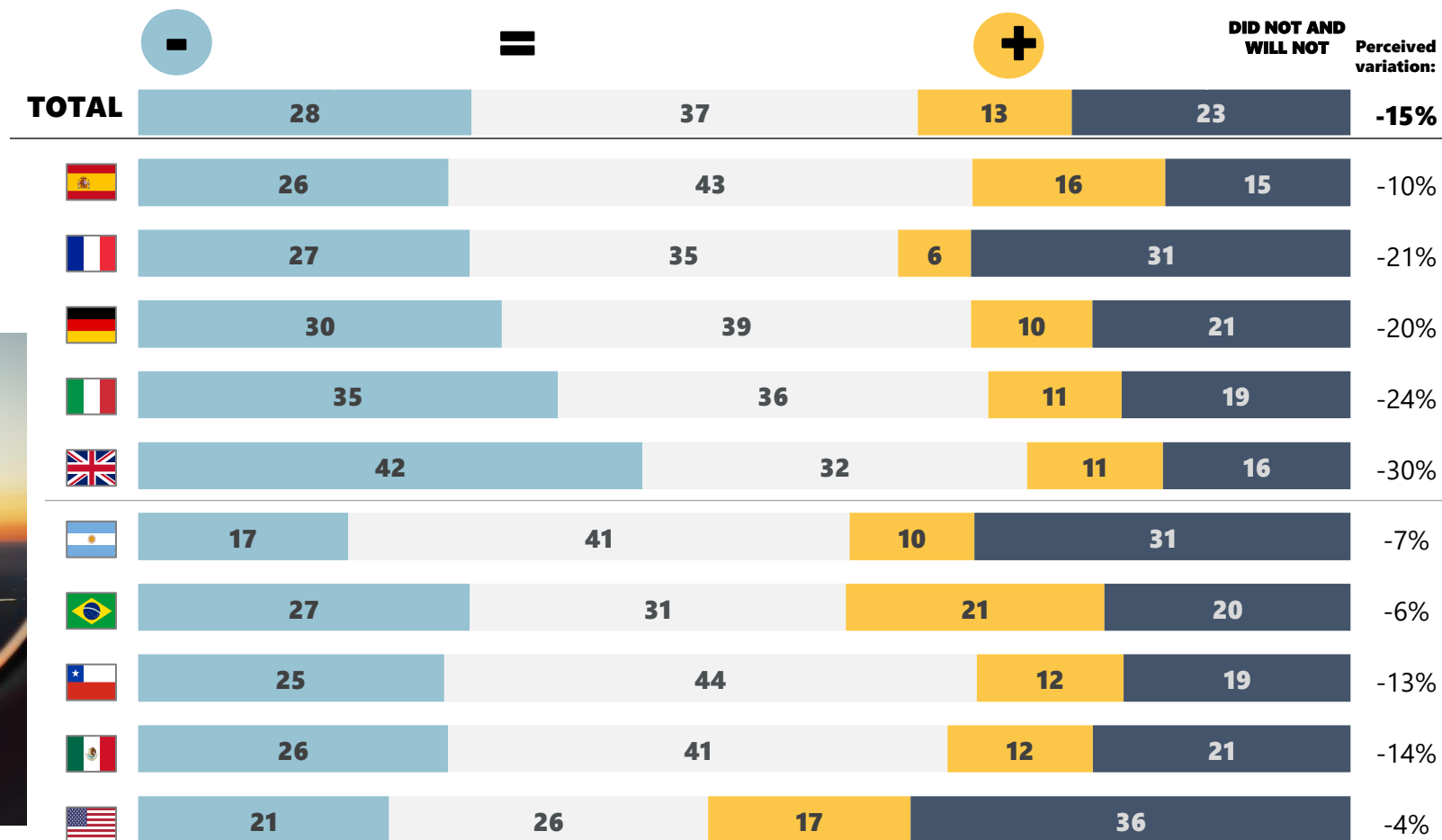
June 2020

-16%

December 2020

-15%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Mobility



Traveling abroad

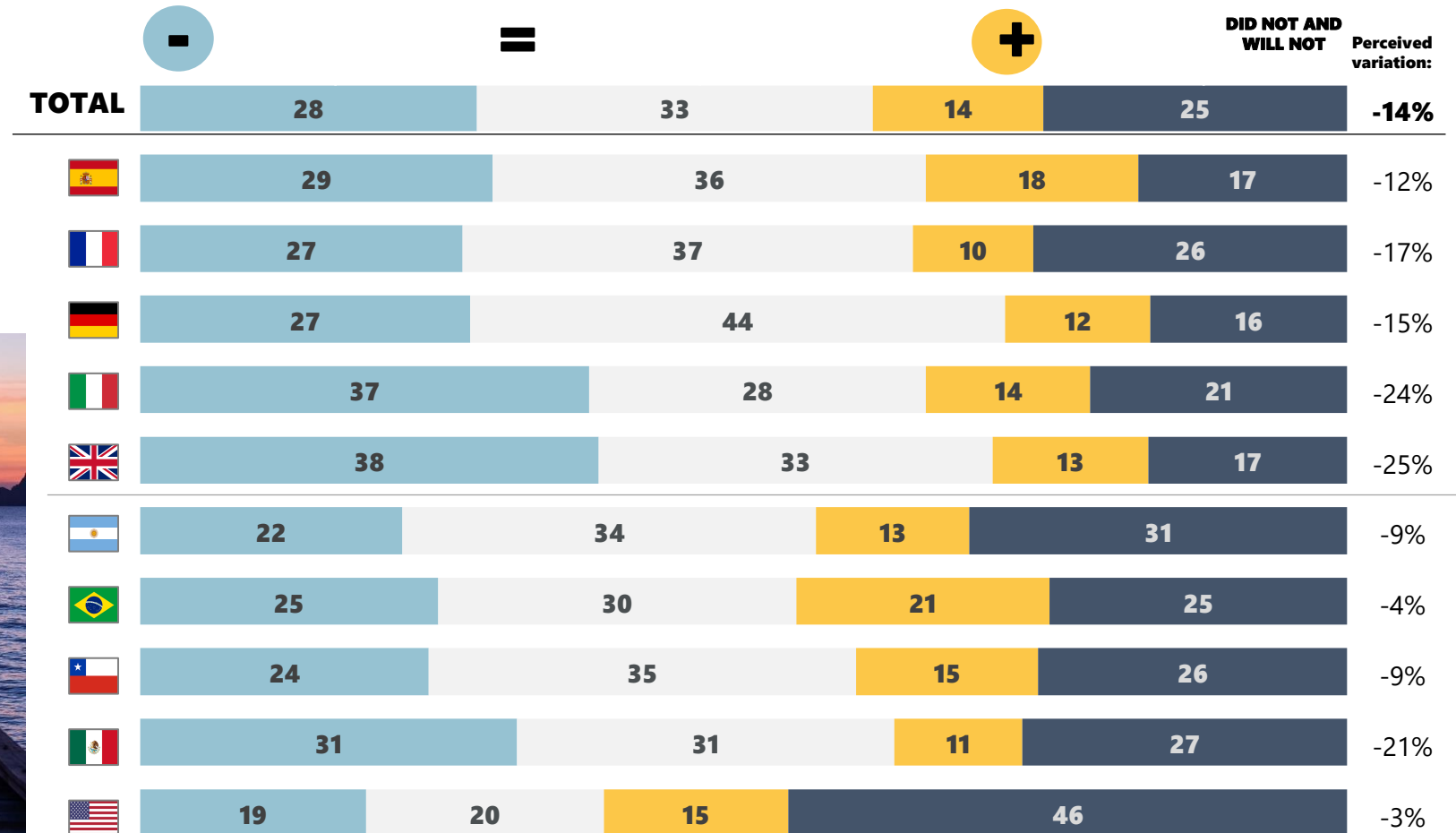
June 2020

-15%

December 2020

-14%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Mobility



Travel within the country

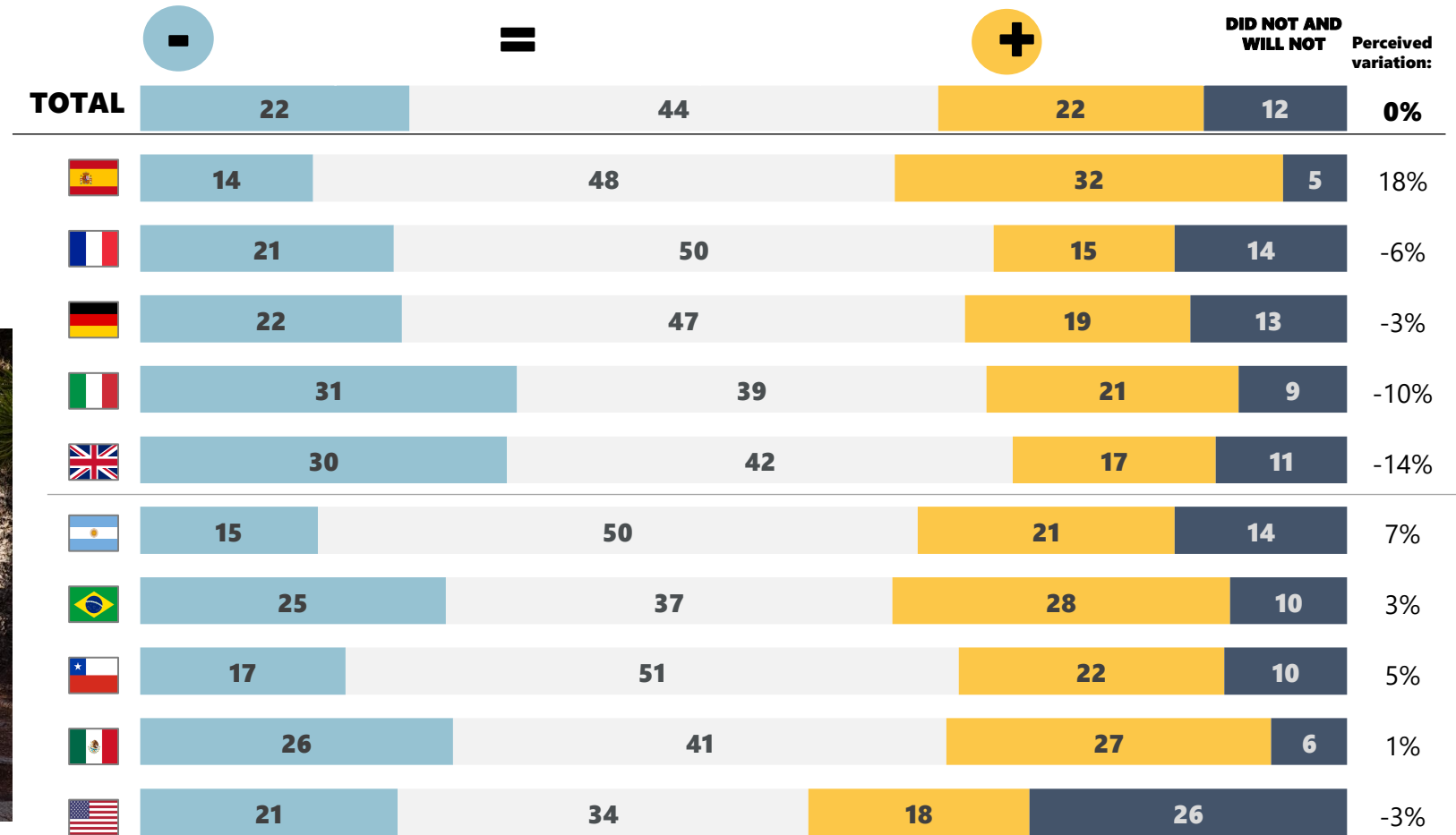
June 2020

-3%

December 2020

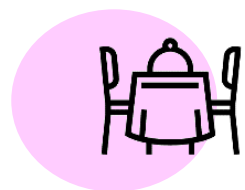
0%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Leisure



Lunch or dinner out

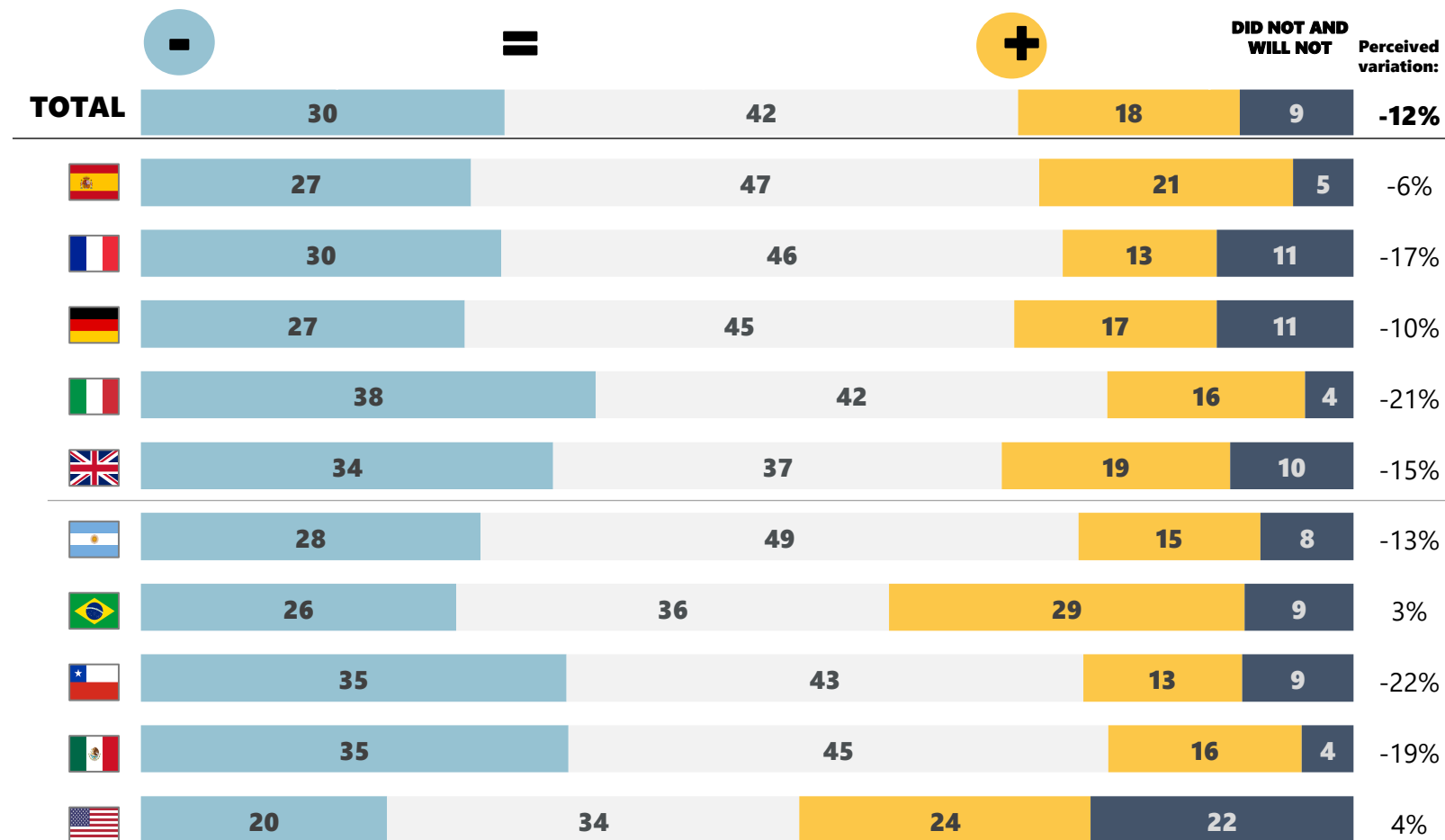
June 2020

-17%

December 2020

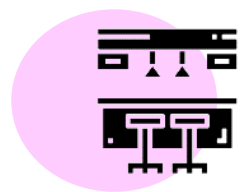
-12%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Leisure



Going to bars or
restaurants

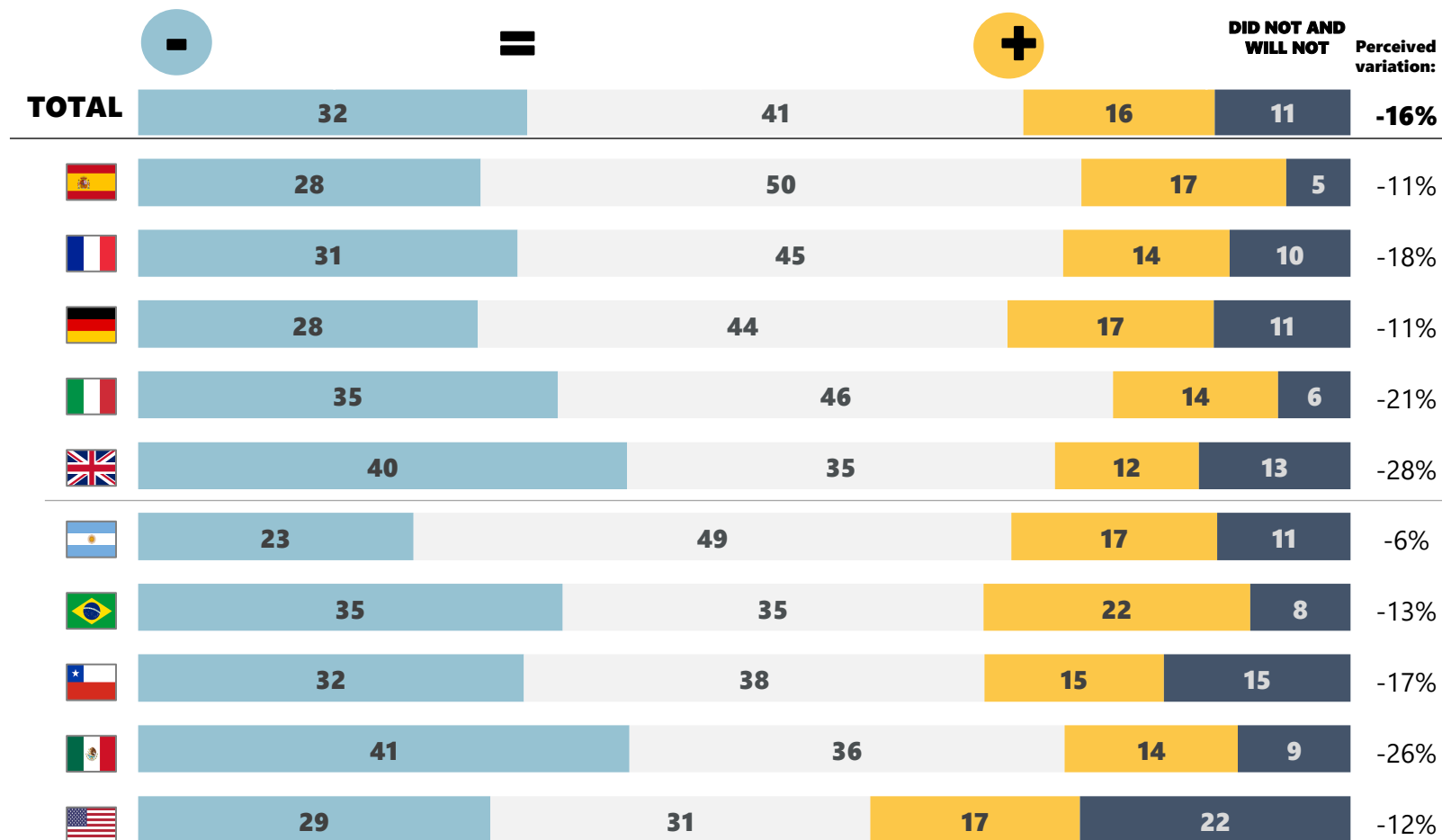
June 2020

-22%

December 2020

-16%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Leisure



Going to a
shopping mall

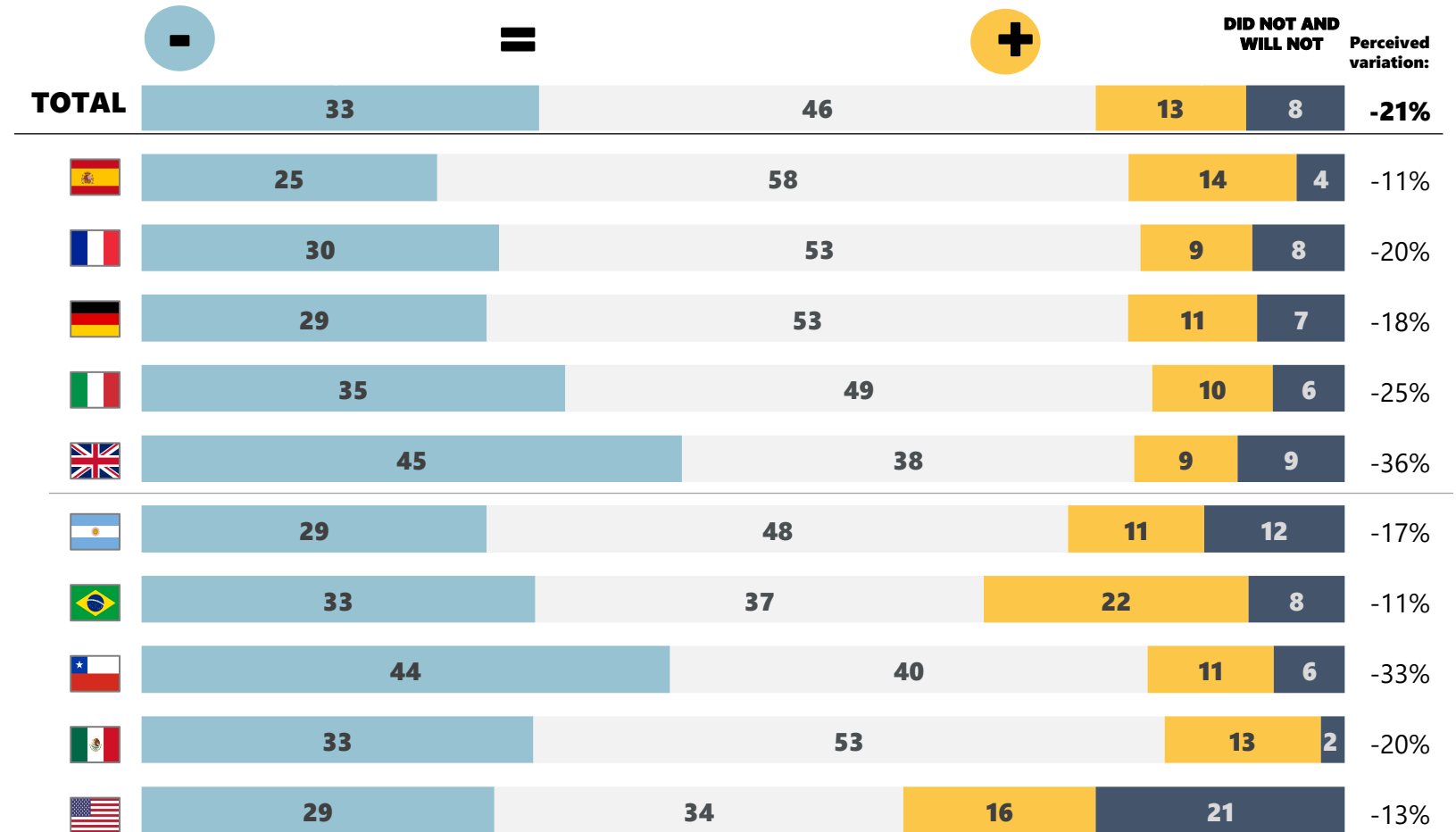
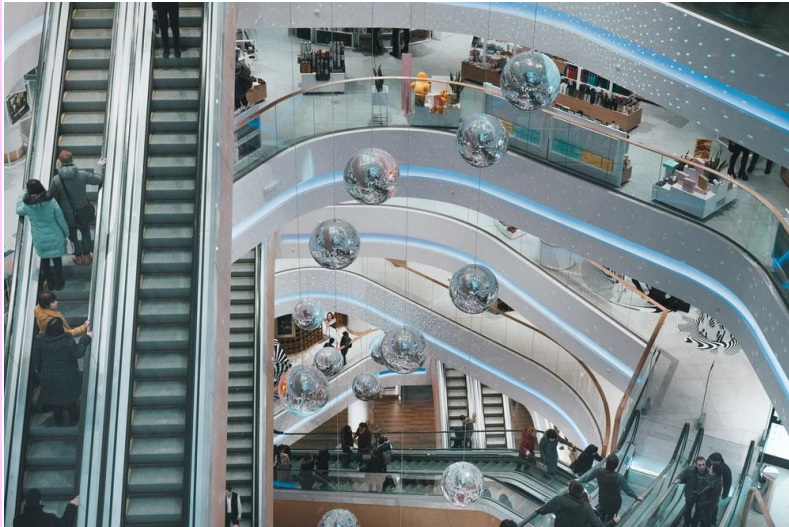
June 2020

December 2020

-26%

-21%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Leisure



Going to the gym

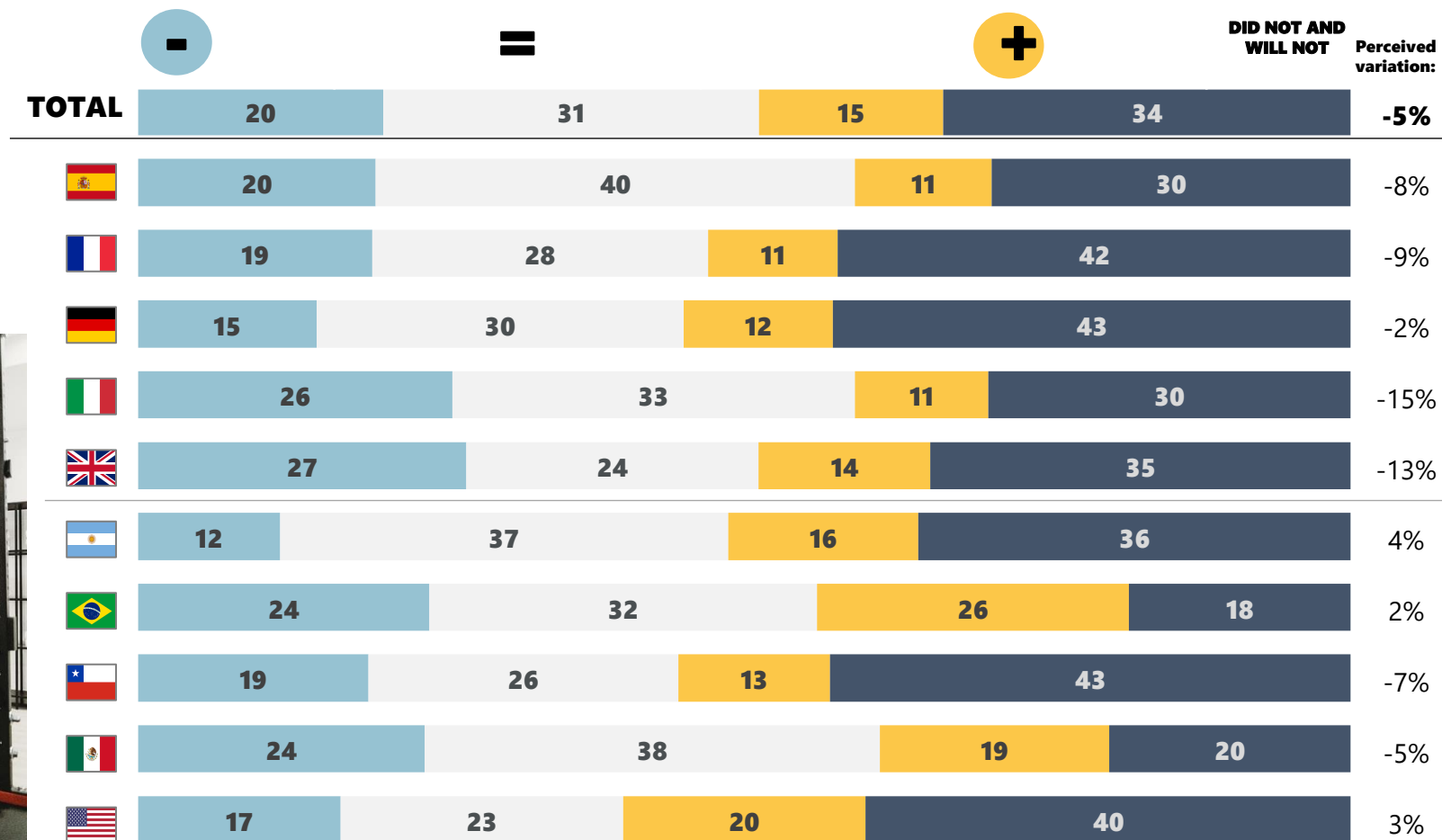
June 2020

December 2020

-10%

-5%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Leisure



Going to festivals
and concerts

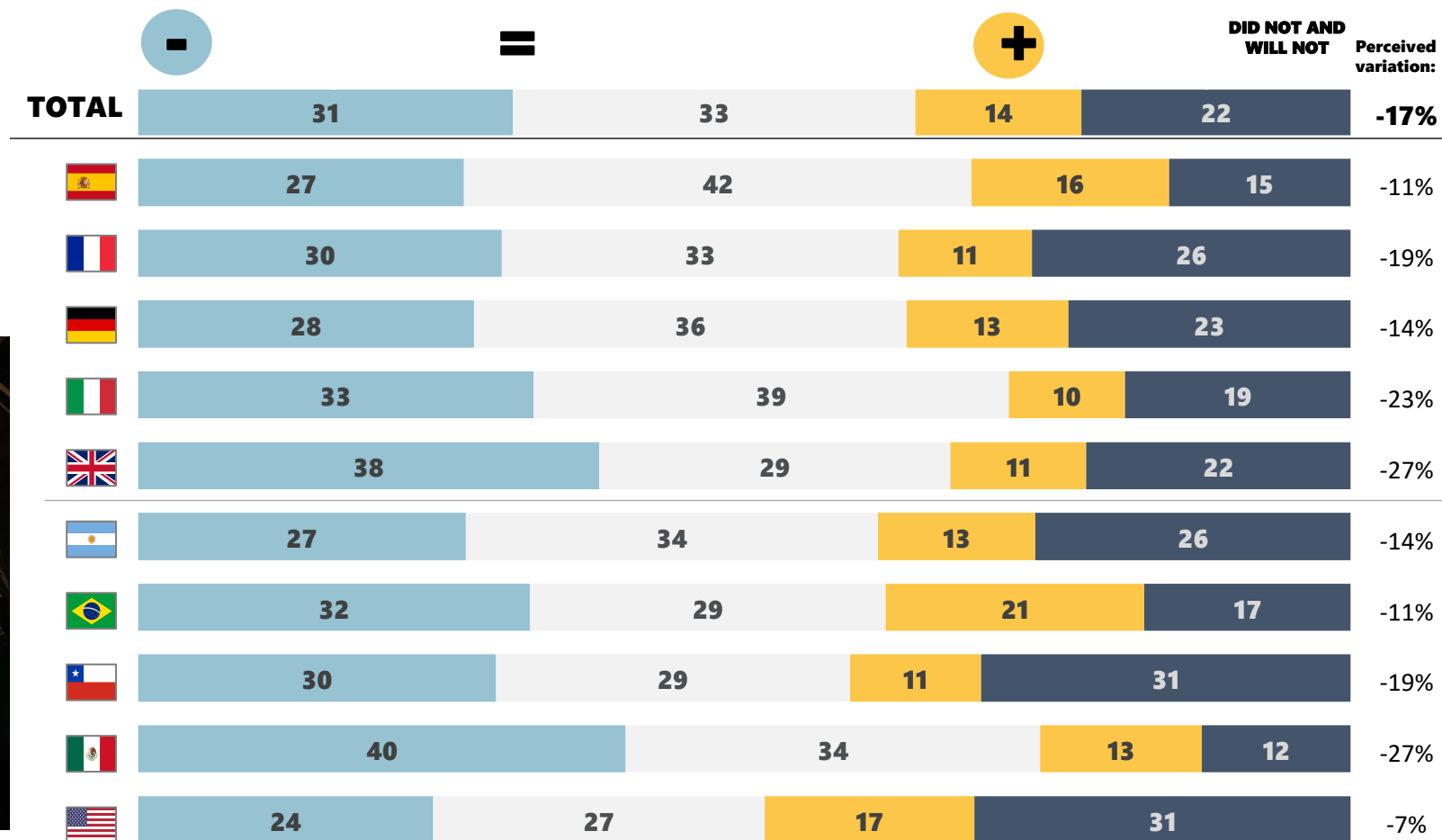
June 2020

-22%

December 2020

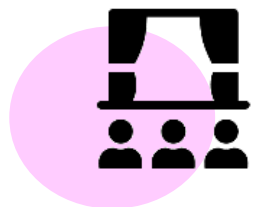
-17%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Leisure



Going to the
cinema and
theater

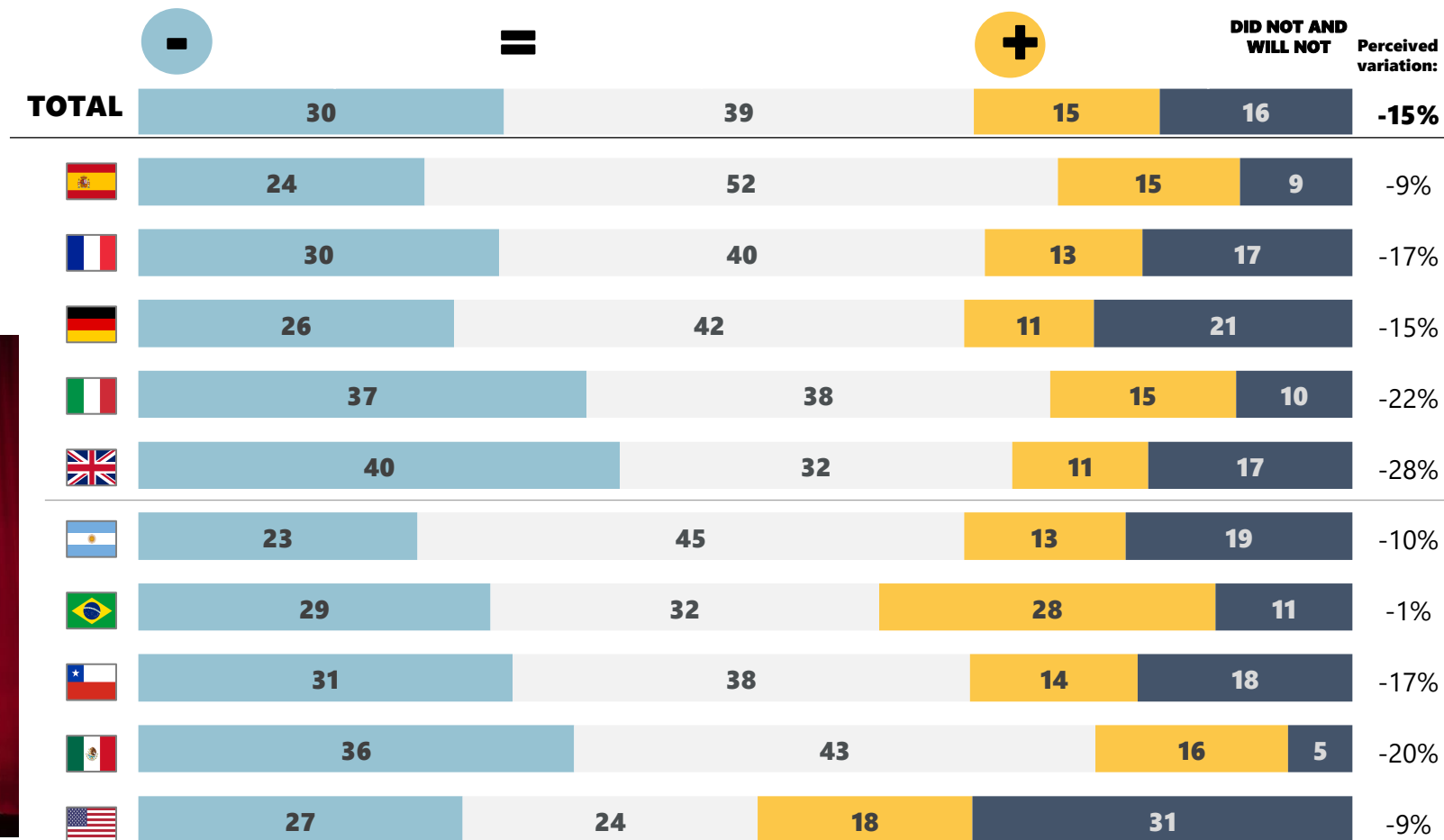
June 2020

-22%

December 2020

-17%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?

Leisure



Buy clothes and
accessories /
Fashion

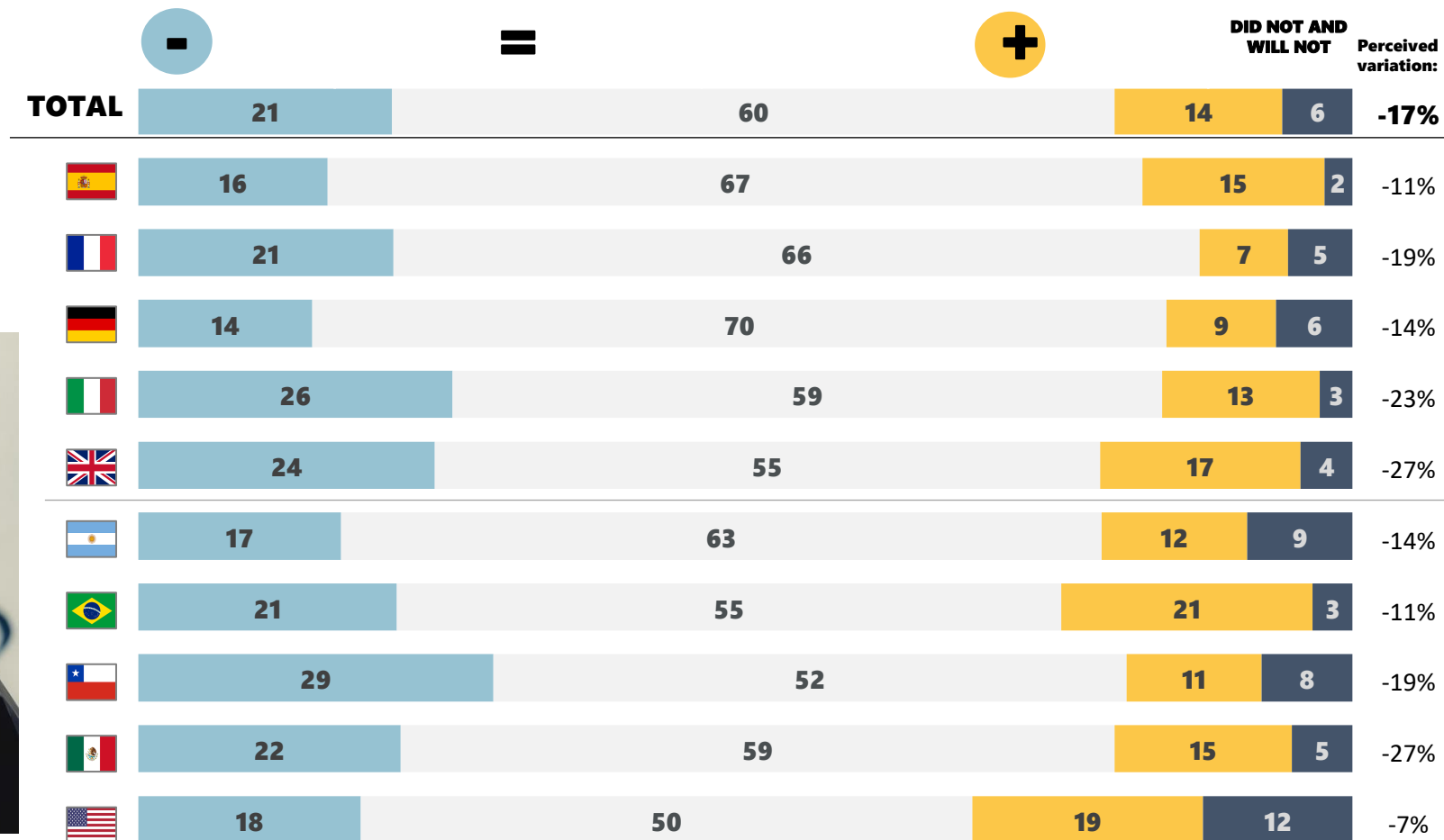
June 2020

-18%

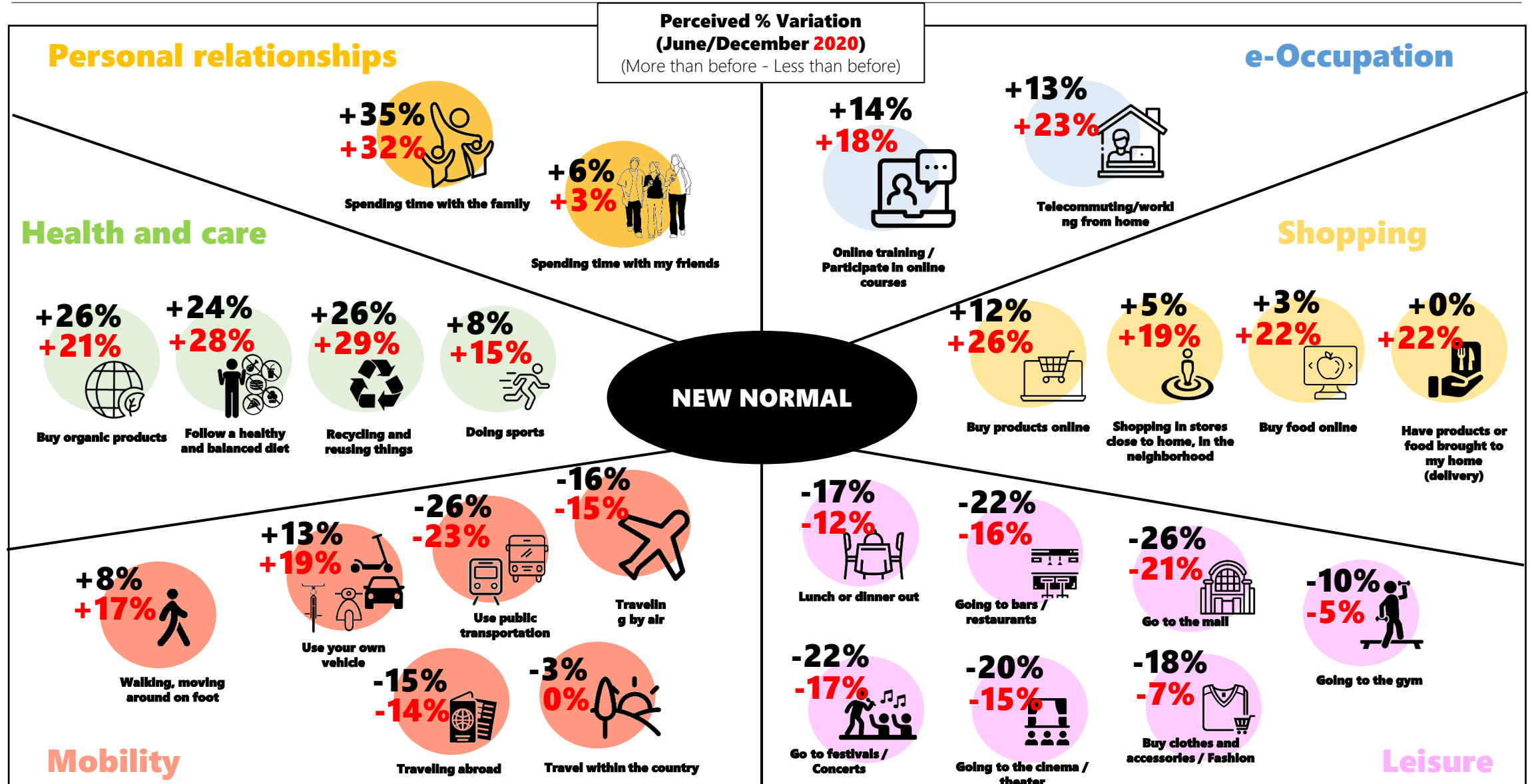
December 2020

-7%

Perceived variation



Q11 Once there is a vaccine, or a safe cure, to eliminate the threat of COVID-19, compared to 12 months prior to the start of COVID-19 do you think you will do less, more, or as before, each of the following activities?



COVID19: catalyst for change in shopping

WHAT we buy (categories)

WHY we buy (drivers)

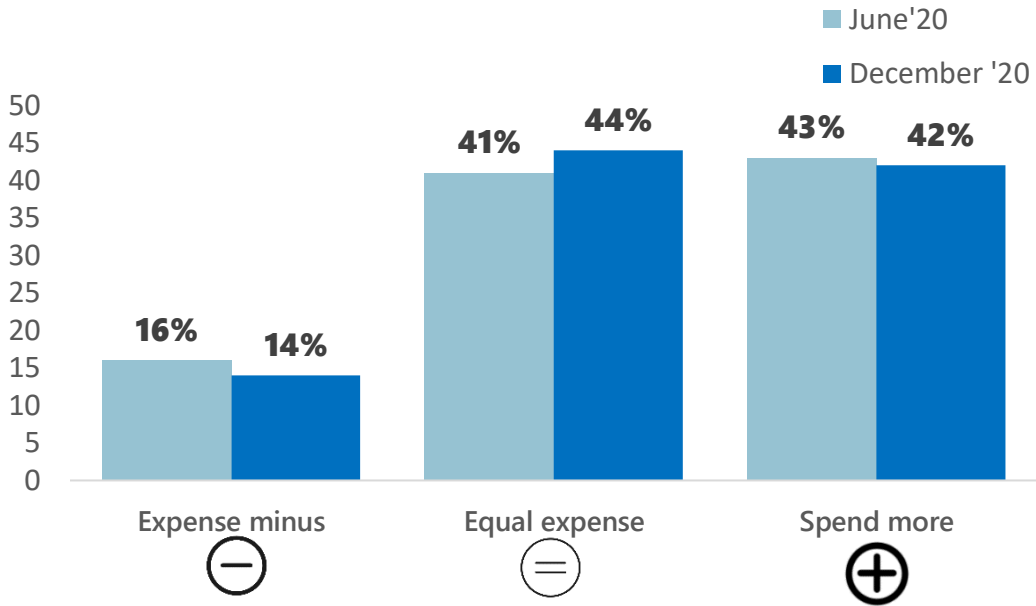
HOW we buy (channels)





With COVID-19 new needs/products lead to more spending: 4 out of 10 consumers have INCREASED their spending on food and household products.

Spending on food and household products



P7. Thinking about what you spend on food and other household products (cleaning, paper...) and compared to what you spent before the coronavirus outbreak, would you say that...

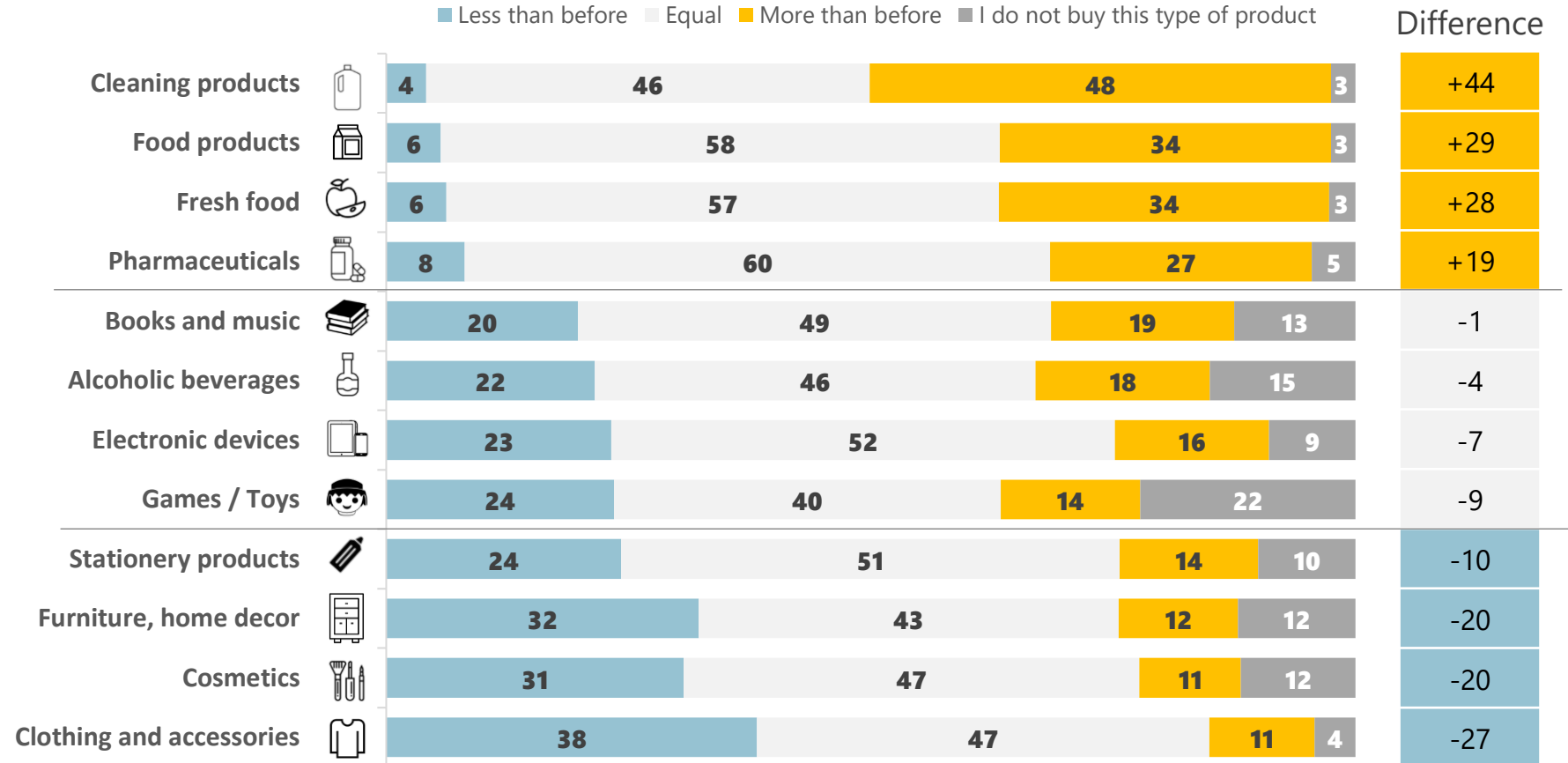


**BACK TO
BASICS in
consumption**

More
commodities, less
accessories

But the impact on purchasing differs between categories

Has the purchase of products changed?













Q9. Are you currently buying less, the same or more of each of these types of products than before?

The "back to basics" trend is accentuated in LATAM

Has the purchase of products changed?

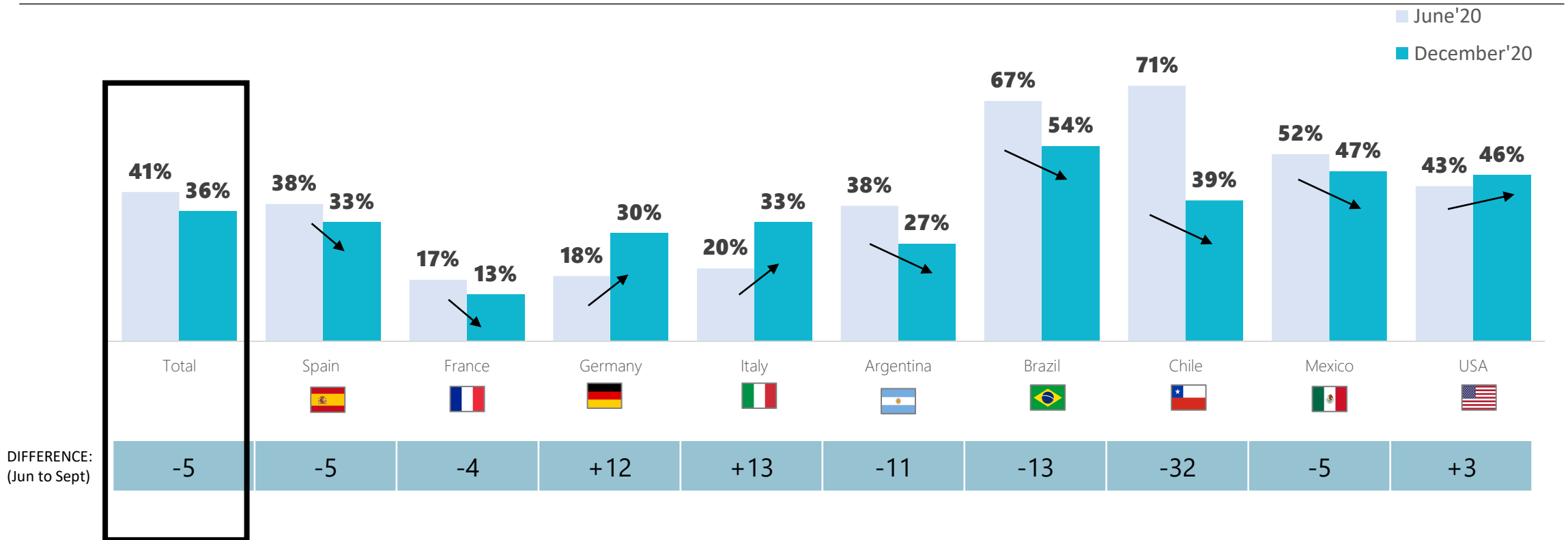
Difference (purchased more-purchased less)

| |  |  |  |  |  |  |  |  |  |  |
|----------------------------|---|--|---|---|---|---|---|---|---|---|
| Cleaning products | 48 | 22 | 19 | 37 | 38 | 51 | 62 | 55 | 65 | 38 |
| Food products | 28 | 15 | 16 | 23 | 24 | 28 | 54 | 30 | 48 | 20 |
| Fresh food | 27 | 16 | 17 | 24 | 27 | 30 | 47 | 29 | 47 | 15 |
| Pharmaceuticals | 21 | 3 | 10 | 17 | 10 | 16 | 44 | 19 | 35 | 15 |
| Books and music | 6 | -4 | 6 | -4 | 8 | -8 | 2 | -15 | -3 | 4 |
| Alcoholic beverages | -2 | -4 | -1 | -10 | 6 | -5 | 10 | -6 | -31 | 9 |
| Electronic devices | 6 | -11 | -6 | -8 | -4 | -19 | -4 | -12 | -14 | 0 |
| Games/toys | -4 | -5 | 0 | -15 | 3 | -20 | -5 | -23 | -26 | 4 |
| Stationery products | 1 | -8 | -9 | -16 | -7 | -14 | -18 | -11 | -18 | 2 |
| Furniture, home decoration | -12 | -12 | -14 | -28 | -13 | -33 | -21 | -29 | -32 | -6 |
| Cosmetics | -17 | -12 | -12 | -27 | -18 | -24 | -11 | -32 | -37 | -11 |
| Clothing and accessories | -26 | -20 | -14 | -35 | -23 | -44 | -22 | -41 | -35 | -12 |

Q9. Are you currently buying less, the same or more of each of these types of products than before?

There continues to be concern about “reallife” shopping, although with high variability between countries. In general, it is higher in the Americas and lower in Europe.

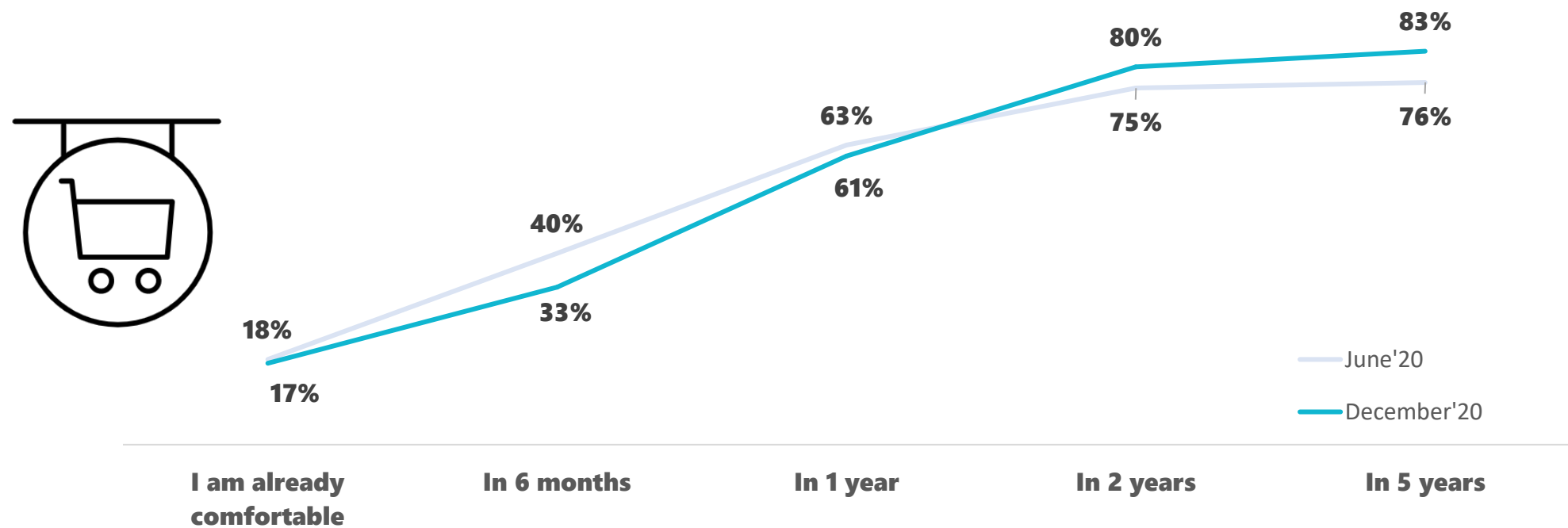
CURRENT concern about COVID-19 exposure when buying (% Very concerned)



P2. Now, when you go to the supermarket, how would you rate their level of concern regarding the possibility of being exposed to coronavirus? Are you....

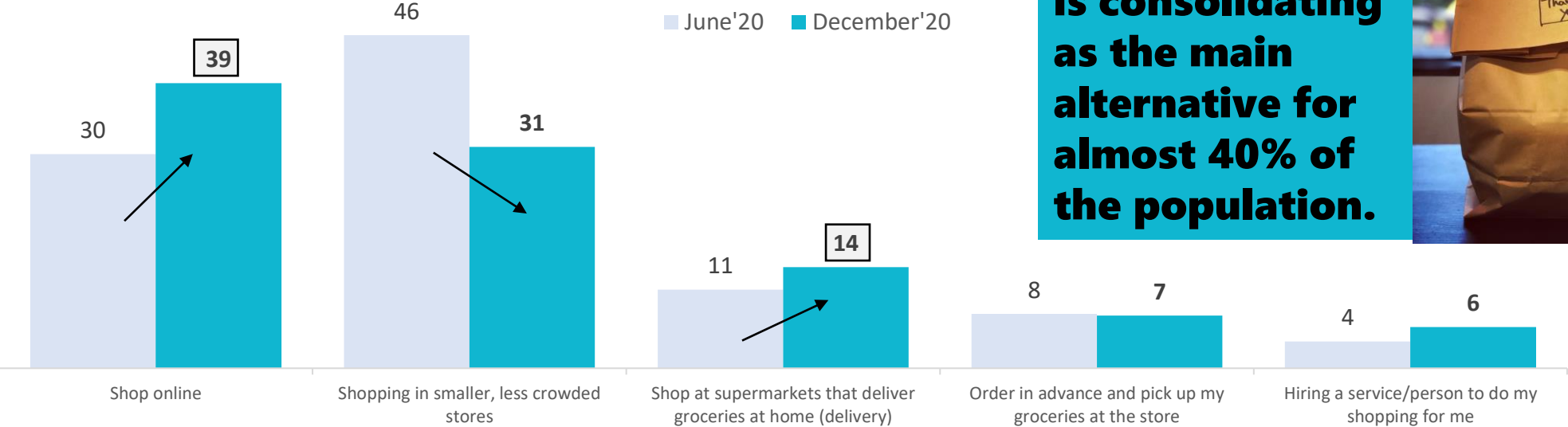
And the feeling persists that recovering a "no worries attitude" will be a slow and gradual process.

When will we **feel comfortable shopping** in supermarkets again?



Q10 How long do you think it will take you to feel comfortable shopping in supermarkets like you did before COVID -19?











If we are not comfortable, what will we do?













Online shopping is consolidating as the main alternative for almost 40% of the population.













ONLINE

| | | | |
|---|-----|---|-----|
|  | 44% |  | 35% |
|  | 45% |  | 24% |
|  | 43% |  | 38% |
|  | 39% |  | 35% |
|  | 56% |  | 39% |











PROXIMITY

| | | | |
|---|-----|---|-----|
|  | 29% |  | 41% |
|  | 27% |  | 30% |
|  | 31% |  | 32% |
|  | 33% |  | 35% |
|  | 19% |  | 28% |

DELIVERY

| | | | |
|---|-----|---|-----|
|  | 16% |  | 12% |
|  | 9% |  | 24% |
|  | 12% |  | 13% |
|  | 10% |  | 18% |
|  | 12% |  | 11% |

TAKE AWAY

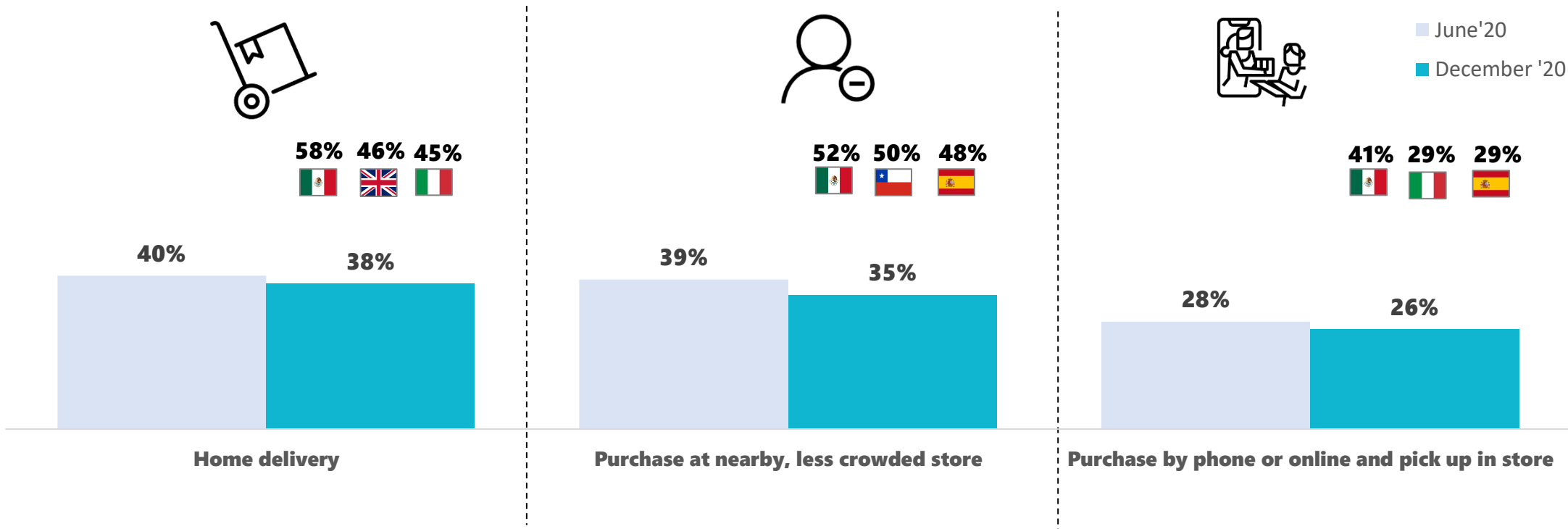
| | | | |
|---|-----|---|-----|
|  | 4% |  | 7% |
|  | 10% |  | 7% |
|  | 8% |  | 9% |
|  | 8% |  | 6% |
|  | 4% |  | 12% |

Q12. After COVID-19, if you do not feel comfortable shopping in supermarkets, what will you do?

Among those who opted for a change of channel, 1 in 3 is willing to pay for it. Rather similar to what happened in June.



Willingness to pay more in food stores (% Yes)

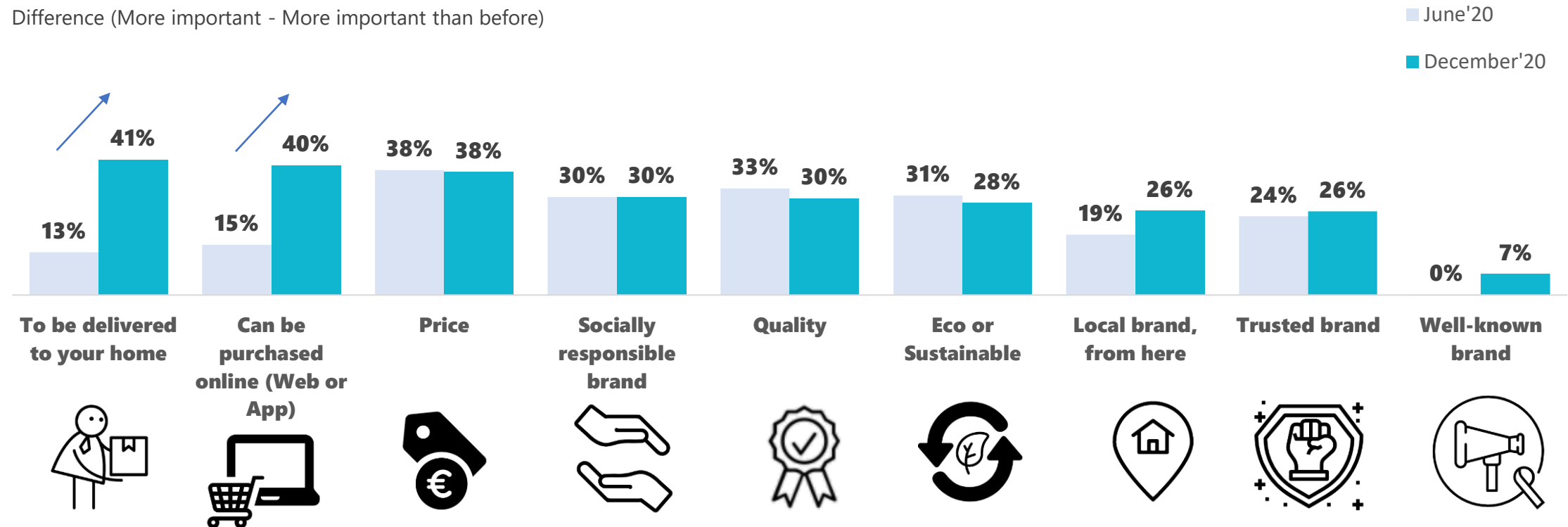


P8. When the COVID-19 threat disappears, how do you think it will affect your shopping habits for food and other household items?

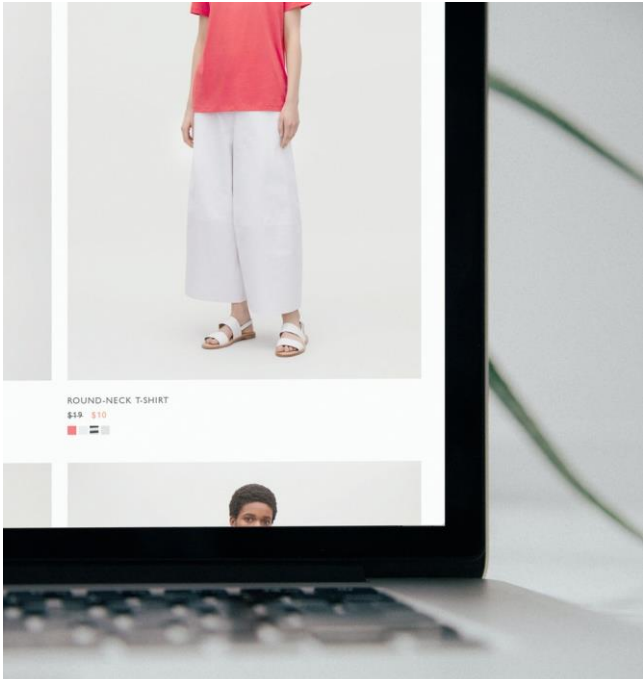
This implies a possible change in purchasing drivers: the **ONLINE** option, **PRICE** and the **RESPONSIBILITY** of the brands at the heart of this change.

Evolution of the importance of the different purchase items

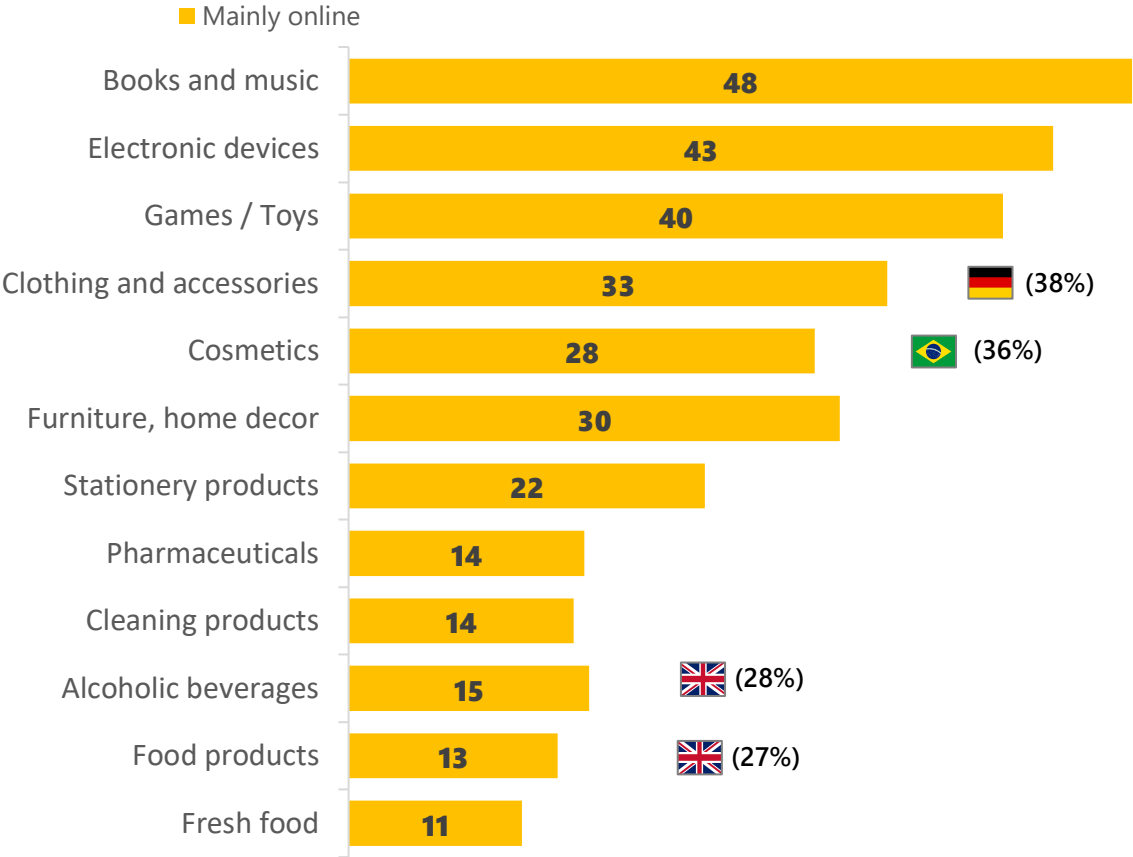
Difference (More important - More important than before)



P15. In the future, when purchasing products or services, to what extent do you think each of the following factors will be more or less important than before COVID-19?

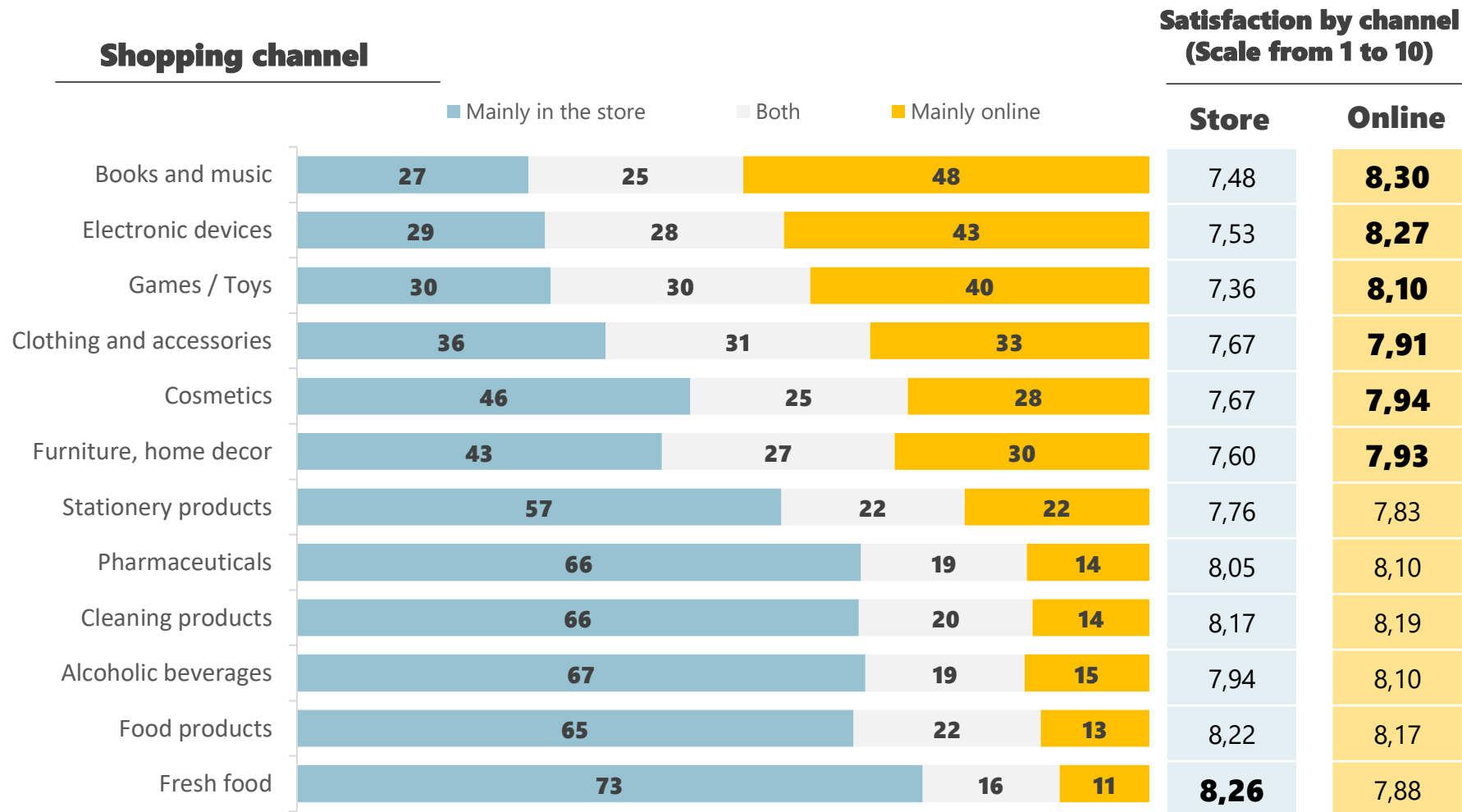


**The ONLINE channel
has become an
EVERYDAY REALITY in
many categories.**



(basis: they buy the products)

Q10. Where are you currently buying each of the following products (or think you will in the next few months)?



Online is a shopping channel that also achieves high satisfaction rates

Thank You for Shopping With us!

(online)

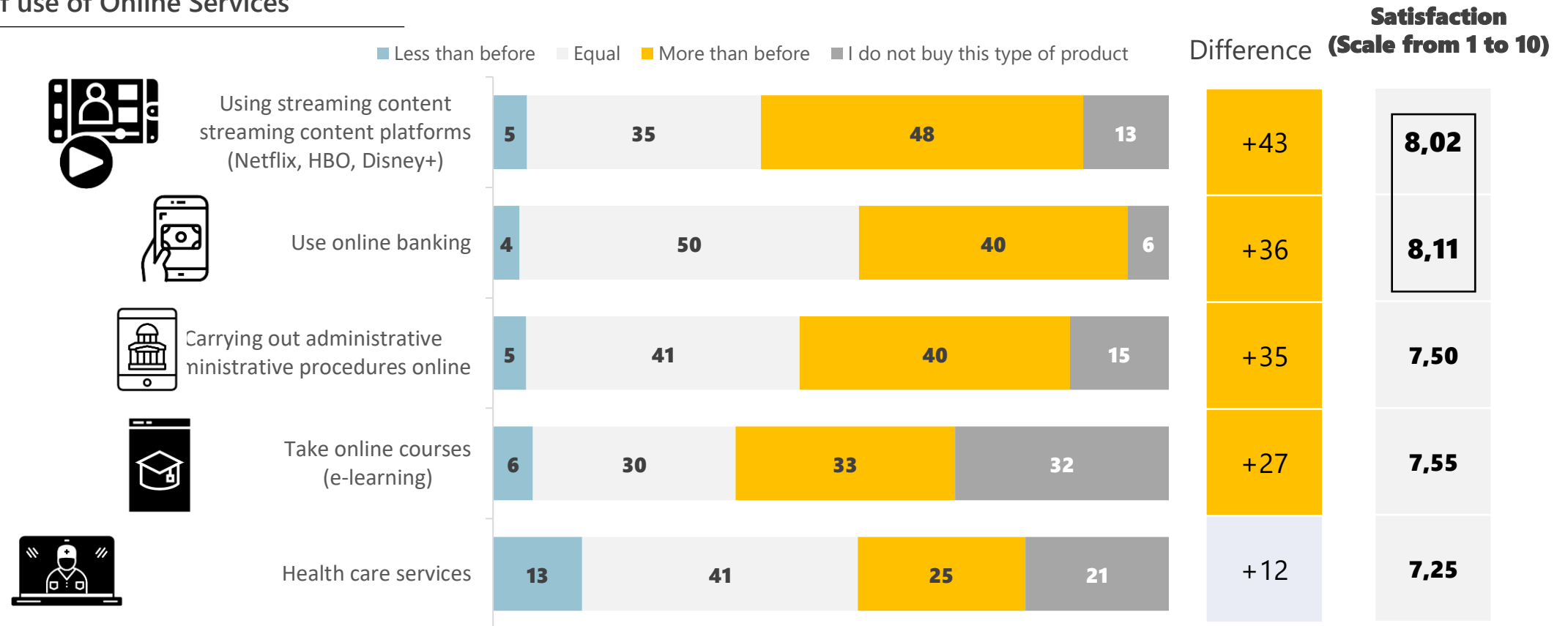
(basis: they buy the products)

Q10. Where are you currently buying each of the following products (or think you will in the next few months)?

Q11. And are you satisfied with this means of purchase?

The digital channel has been extended to many other areas, although not all of them with the same level of satisfaction. The highest rated: online streaming platforms and online banking.

Frequency of use of Online Services



P12. As a result of the pandemic, the frequency with which...
 Q13. And to what extent are you satisfied with these services?

The digital channel is consolidating in services in a transversal manner in the countries analyzed

Has the purchase of products changed?

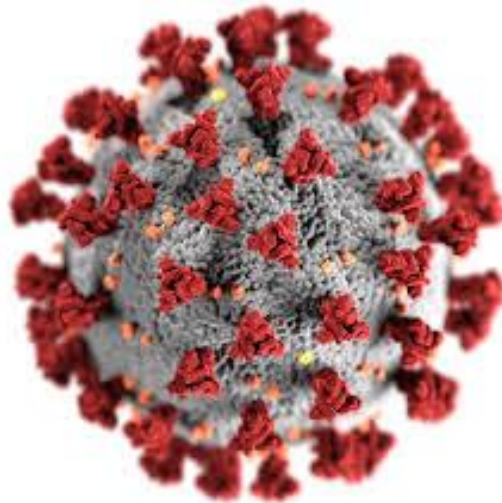
Difference (purchased more - purchased less)

| |  |  |  |  |  |  |  |  |  |  |
|---|---|--|---|---|---|---|---|---|---|---|
|  Use streaming content streaming content platforms (Netflix, HBO, Disney+) | 53 | 32 | 29 | 33 | 26 | 53 | 65 | 50 | 63 | 24 |
|  Using online banking | 40 | 17 | 15 | 27 | 25 | 48 | 63 | 43 | 55 | 25 |
|  Carry out administrative administrative procedures online | 45 | 24 | 15 | 36 | 26 | 49 | 49 | 41 | 47 | 19 |
|  Conduct online courses (e-learning) | 28 | 15 | 17 | 19 | 19 | 33 | 44 | 24 | 45 | 21 |
|  Health care services | 7 | 13 | 10 | 25 | 25 | -6 | 15 | -6 | 4 | 30 |

P12. As a result of the pandemic, the frequency with which...

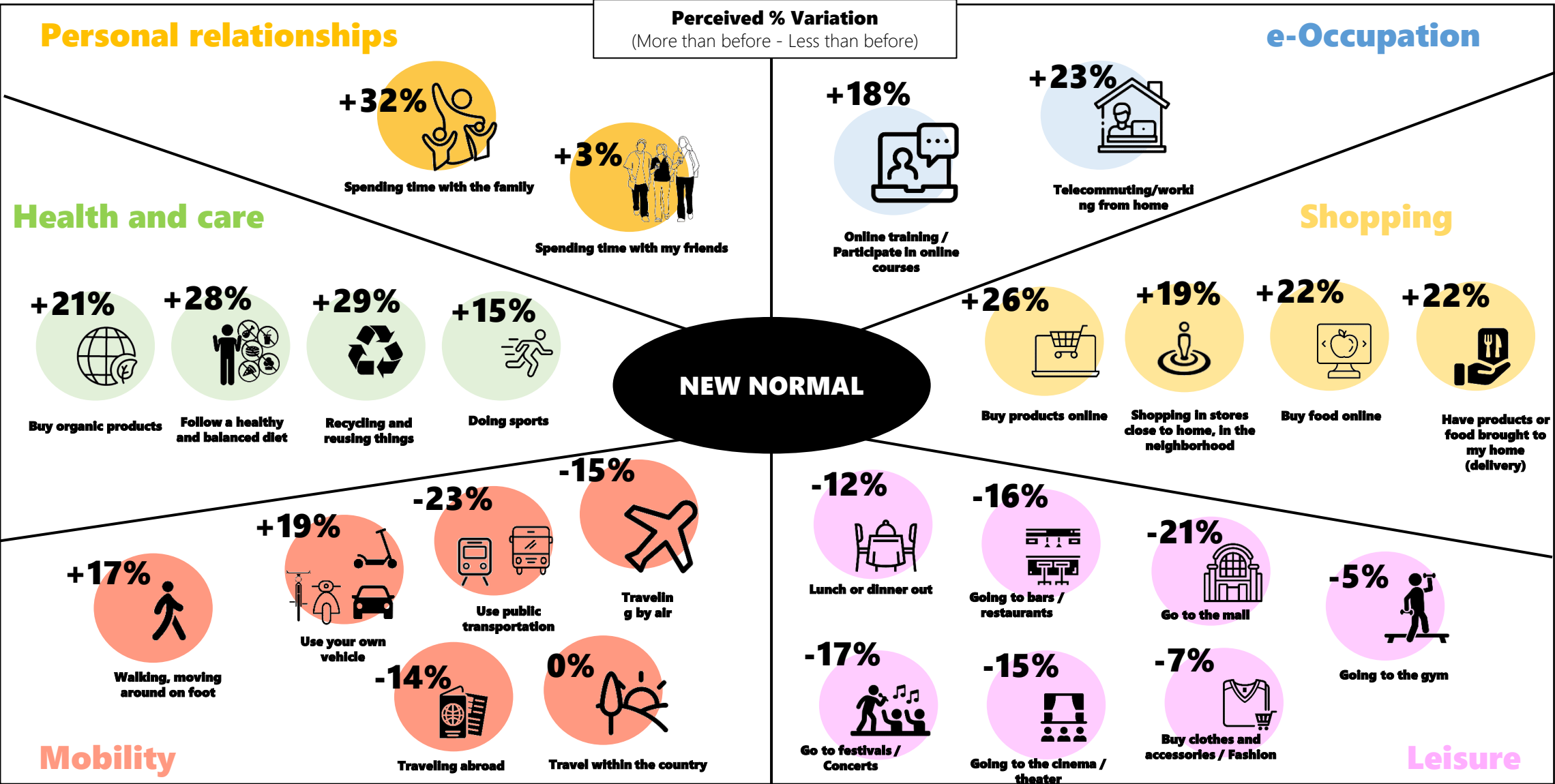
Key Insights

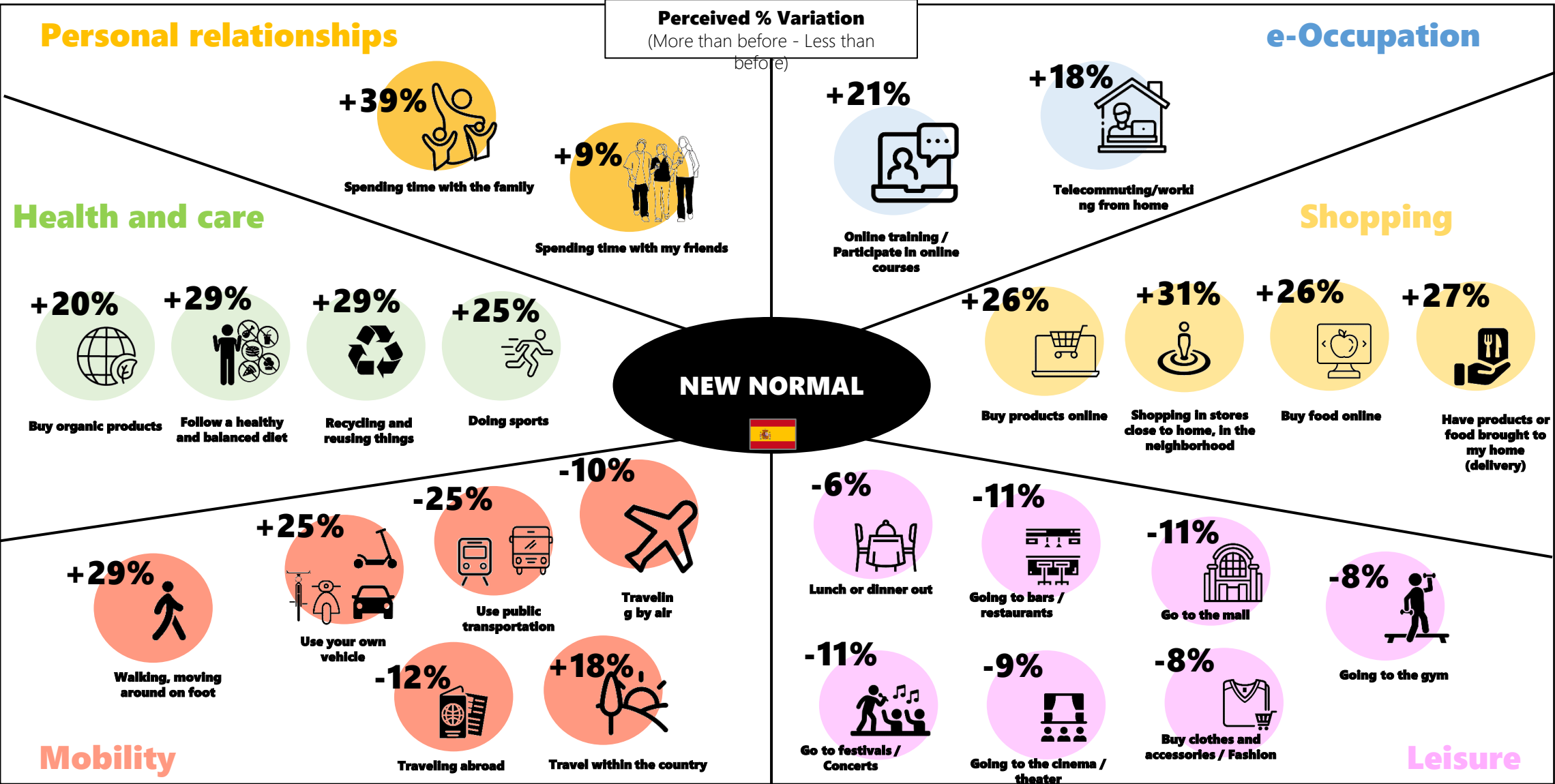
'Anticipating the new normal'



2nd wave - December 2020

- 1 **COVID-19 sets a new paradigm:** for 83% COVID-19 will change our lives
- 2 After almost a year in pandemic, **fatigue takes its toll and social disillusionment grows** (especially in Europe).
- 3 The **vaccine** generates **hope** but in the **medium term** (for 50% not before 1 year).
- 4 **As the months go by, the emotional fragmentation is not marked by country but by the vital attitudes** towards the pandemic.
- 5 **5 attitudes** towards COVID: **insecure** (19%), **angry** (7%), **tired** (25%), **optimistic** (39%) and **disbelieving** (11%).
- 6 Pandemic **attitudes lead to changes in purchasing needs and drivers**
- 7 The "**normalization**" of family time, the search for the health and the digitization of work and shopping.
- 8 Consumer spending **is experiencing a "back to basics"** trend, more accentuated in LATAM.
- 9 The pandemic accelerates the **consolidation of the Internet as an alternative to face-to-face shopping, which is still felt as uncomfortable and insecure**, also achieving a **digital UX** with **high levels of satisfaction**.
- 10 **Local shopping** is also emerging as an **alternative** trend, facing the decline of large **shopping centers**.







Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

Anticipating the new normal

2nd Wave



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THANK YOU!

