Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

Anticipating the new normal

Global references and orientations

July 2020

* Punto de Fuga is member of the international result newtork ARTIS

CONTEXT

The outbreak of the Coronavirus as a global pandemic has had devastating effects worldwide, and its situation is far from stabilizing. It is not yet possible to determine the future scope of these unprecedented crises in the contemporary world, but their effects in the short term are evident, both at the health, economic and social levels. On the collective and individual level.

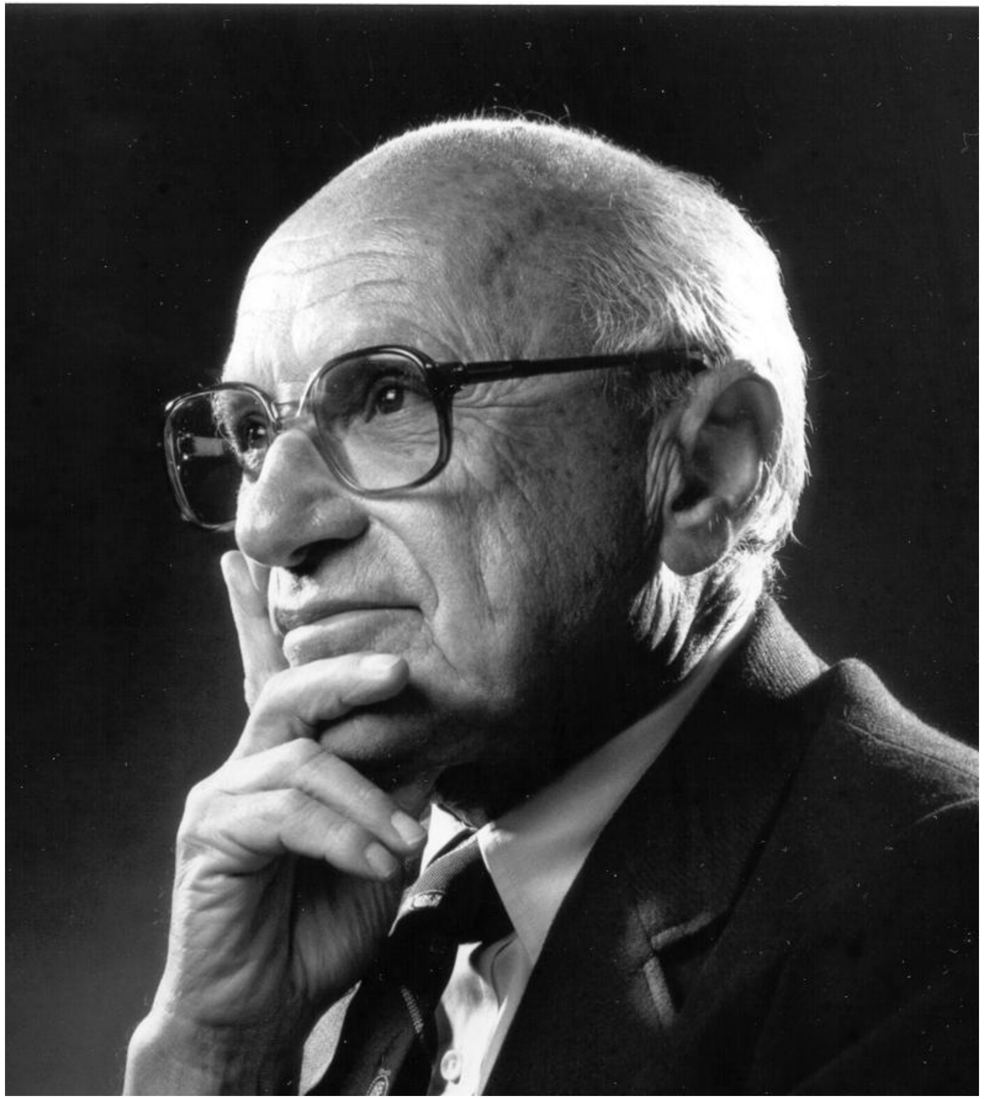
The future is uncertain and ongoingly changing.

And this has a direct impact on our lives, our needs, our values, our emotions, how we think, how we organize ourselves as a society, how we relate to each other, and it is decisive for our consumption patterns. Some behavioral changes may stay only short term as they were forced though not wanted, but others may be modified in a more permanent way.

Brands and companies must listen and understand this **new reality** in order to be able to **READJUST and RETUNE to the needs of the market.**

Punto de Fuga presents in this report a first analysis in **11 countries** of **how the citizen's experience has been in these first months of the pandemic** as well as the **changes of behavior that the consumers anticipate today**.

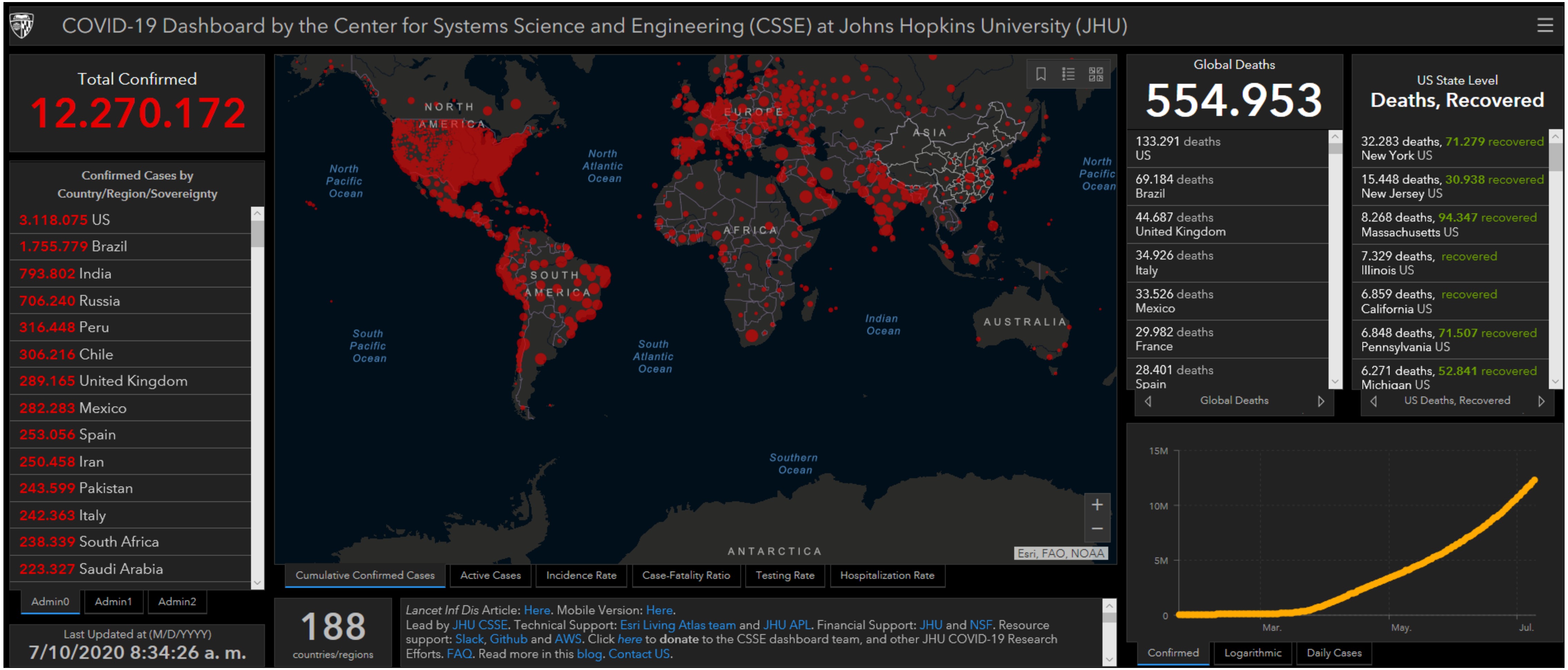
"Only a crisis – actual or perceived – produces real change."



Milton Friedman, Economist

A global crisis

Updates to be found at: *https://coronavirus.jhu.edu/map.html*



MAIN OBJECTIVE

The main objective of this study:

To x-ray the effect of the pandemic in terms of consumer perceptions and behaviors in 11 countries and anticipate future consumption prospects.

The analysis of the information and the learnings obtained in the study should help to…

guide brands and companies in their future strategies towards a "new normal"

OVERVIEW

4.535 online interviews

LOI: 12 minutes each

Individuals **18 yoa and older**
Worldwide in 11 countries

Fieldwork was realized between
15th and 24th of June 2020

Sampling error (95% CI):
+ 1.45% globally
+ 4.90 per country

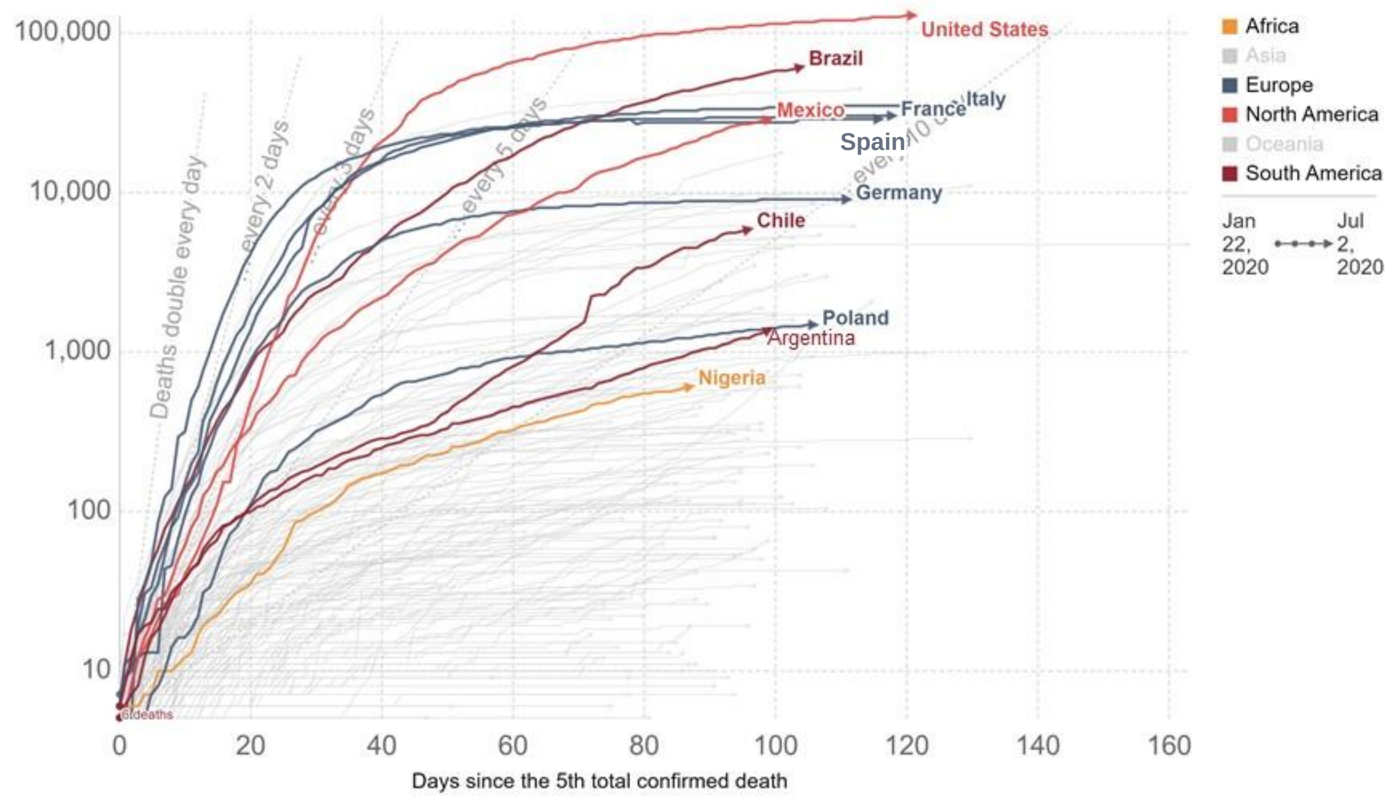
Argentina	n=400
Brazil	n=525
Chile	n=400
France	n=400
Germany	n=400
Italy	n=400
Spain	n=400
Poland	n=410
Nigeria	n=400
USA	n=400
Mexico	n=400

CURRENT EVOLUTION OF THE PANDEMIC

At the time of the study (end of June 2020) we observed 3 different spreading speeds of the pandemic in the countries analyzed:

- **SLOWLY**
  - Germany
  - France
  - Italy
  - Spain
- **MIDDLE**
  - USA
  - POLAND
- **RAPIDLY**
  - Brazil
  - Mexico
  - Chile
  - Argentina
  - Nigeria

Total confirmed deaths by COVID-19



Source: European CDC – Situation Update Worldwide – Last updated 2nd July, 13:00 (London time) OurWorldInData.org/coronavirus • CC BY

MAIN RESARCH BLOCKS

Psychological and social impact of COVID-19

Perspectives on the pandemic. Current mood.
Positive and negative effects.
Assessment of the management of institutions, companies, brands and citizenship

Shopper experience: during and after COVID

How UX has been during the pandemic?
Level of concern when buying.
Measures that help you feel more comfortable.
New UX, New drivers.

Anticipating the new normal

What behavioral prospects are anticipated?
What activities will be done more and what activities will be stopped?

Psychological and social impact after COVID-19

Psychological and social impact after COVID-19

As of June 2020, **concern coexists with hope in the consumer's state of mind**. Tired in Europe (France, Poland), anxious in Latin America (Brazil and Chile), more relaxed in Germany.

In general, **France, Germany, Mexico and Nigeria show more optimism, while anxiety and concern take their toll in Latin America.** In Spain and Italy, a high worry ratio persists also.

The **perception of a vital change after COVID-19 is very high**, especially in Latin America and Spain. Lower impact perception in Germany, France and Poland.

Beyond the health crisis, the **fear of economic recession and unemployment** are the worst consequences expected. While the **recognition of the health professional, the emerging solidarity and the family support emerge** as the positive effects of the crisis.
And yet, some optimism: **30% anticipate an improved society after the crisis**, a percentage that rises to 50% in the Latin American countries analyzed.

In the management of the crisis, the merit of professionals and citizens is recognized and the efforts of governments and international entities are questioned. Better assessment of local governments.

Discrete role of the different sectors, although the role of e-commerce, cleaning brands and distribution is valued.
Amazon, (one of) the top brands during the crisis, also other distribution chains ae presented. In Spain, Inditex and Mercadona are the brands that have most impressed during the pandemic.

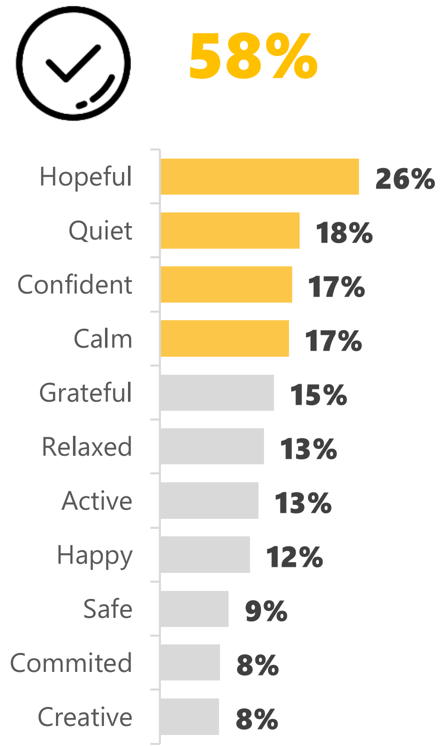
How do they feel? JUNE 2020

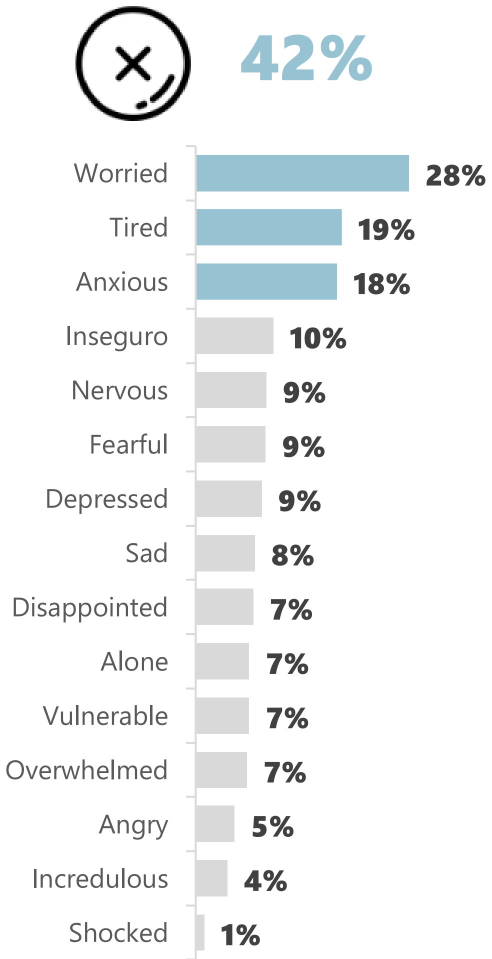
Emotional Ratio :

P16. Select the three words that best describe your current mood:

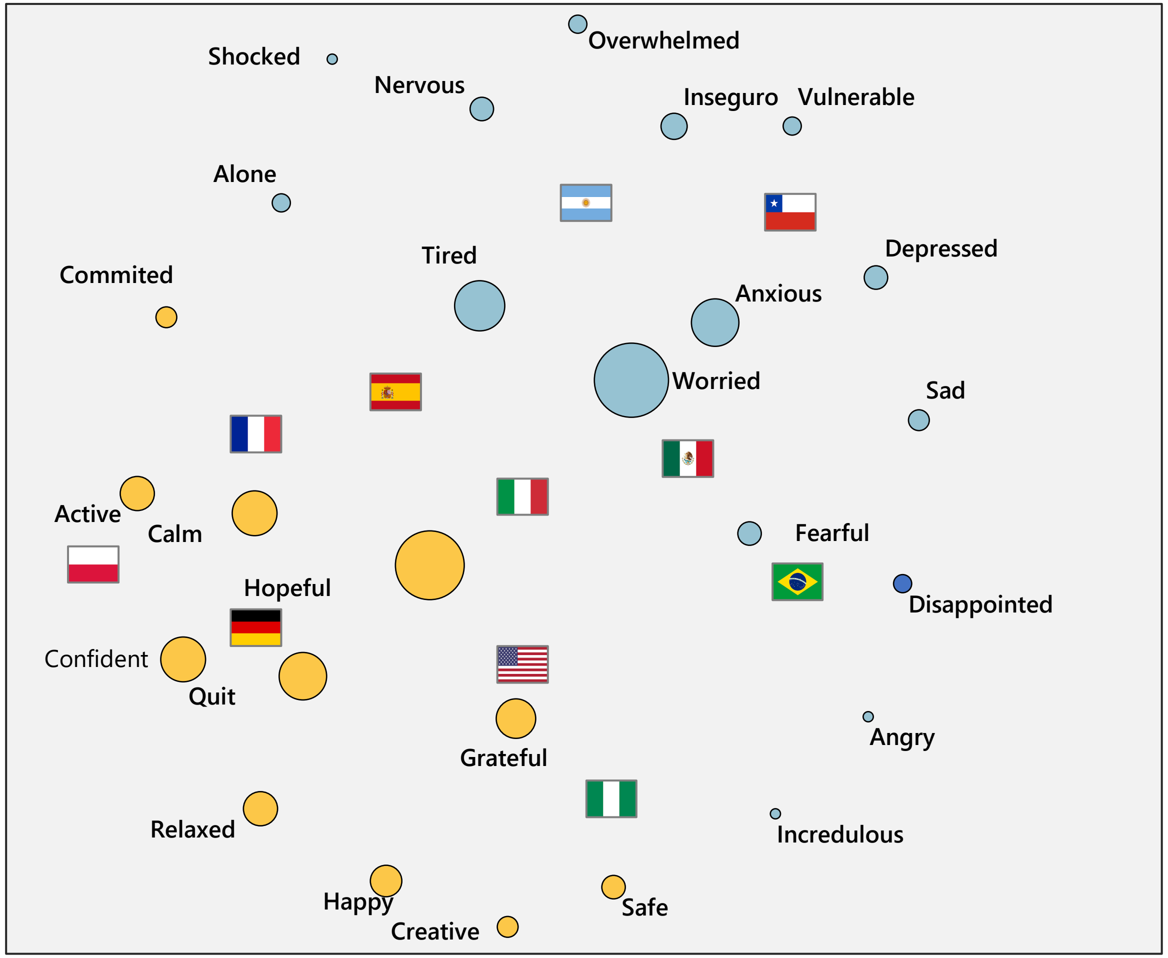
How do they feel?

JUNE 2020





Semantic Mapping



How do they feel?

Moods reflected by word clouds
- by country -

P16. Select 3 words that best describe your current mood:

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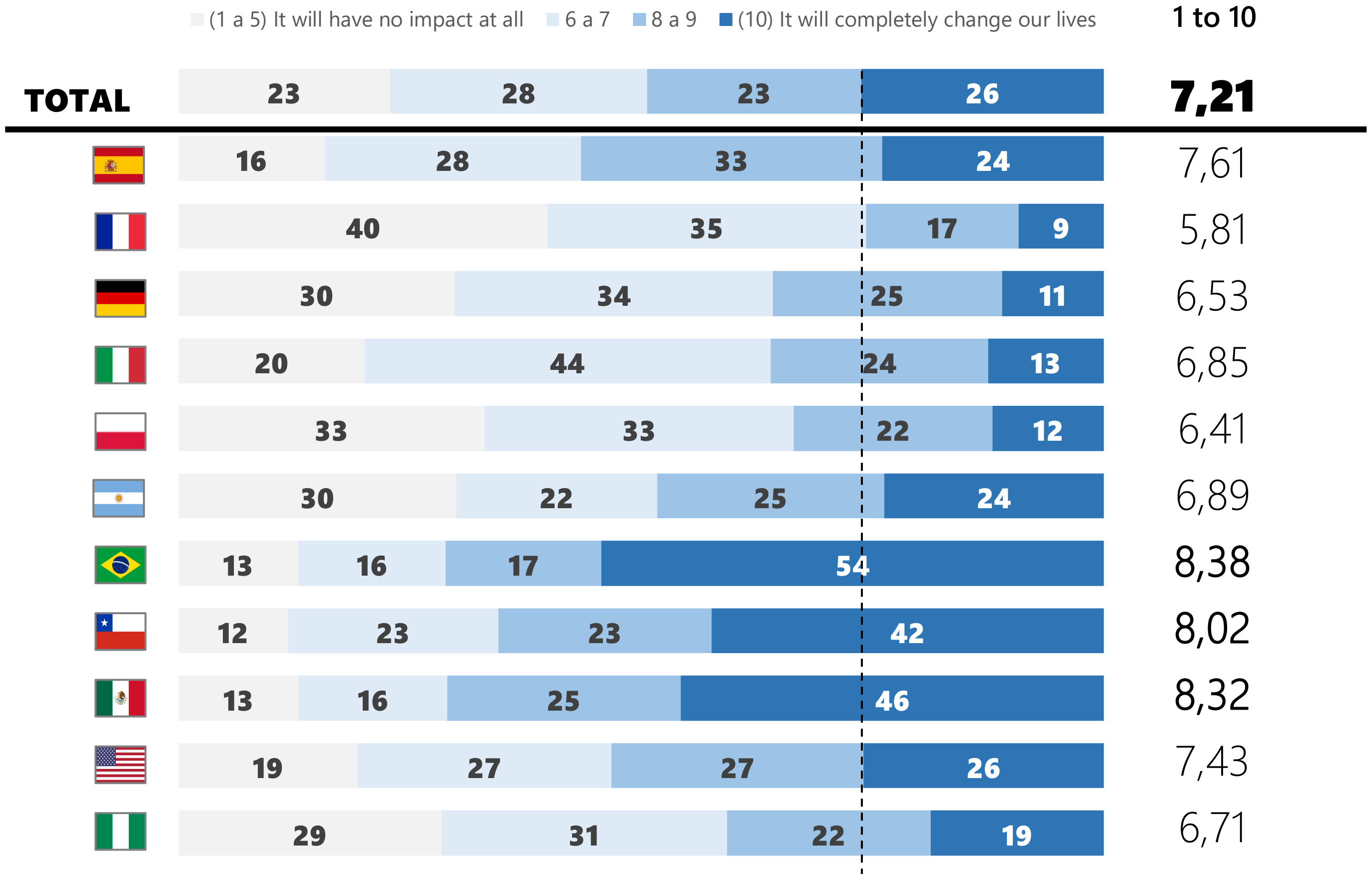
Will COVID-19 change our lives?

Change Ratio
1 to 10



P17. 17.To what extent do you think COVID-19 will permanently change our lives?

"COVID-19 will change our lives completely"

Highest level of change perception in LATAM and Spain.

7,21
From 1 to 10
change completely

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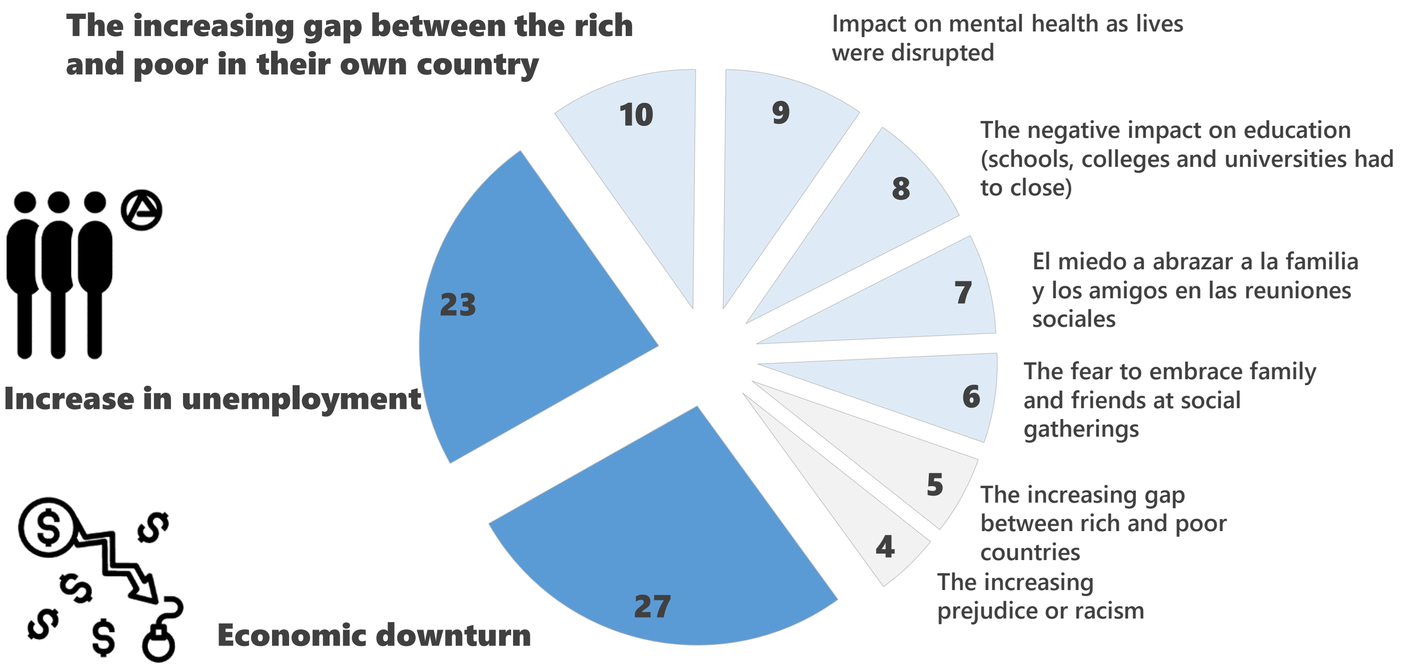
Economic recession, rising unemployment and the gap between countries are the worst fears after COVID-19

What is the worst consequence of the pandemic?

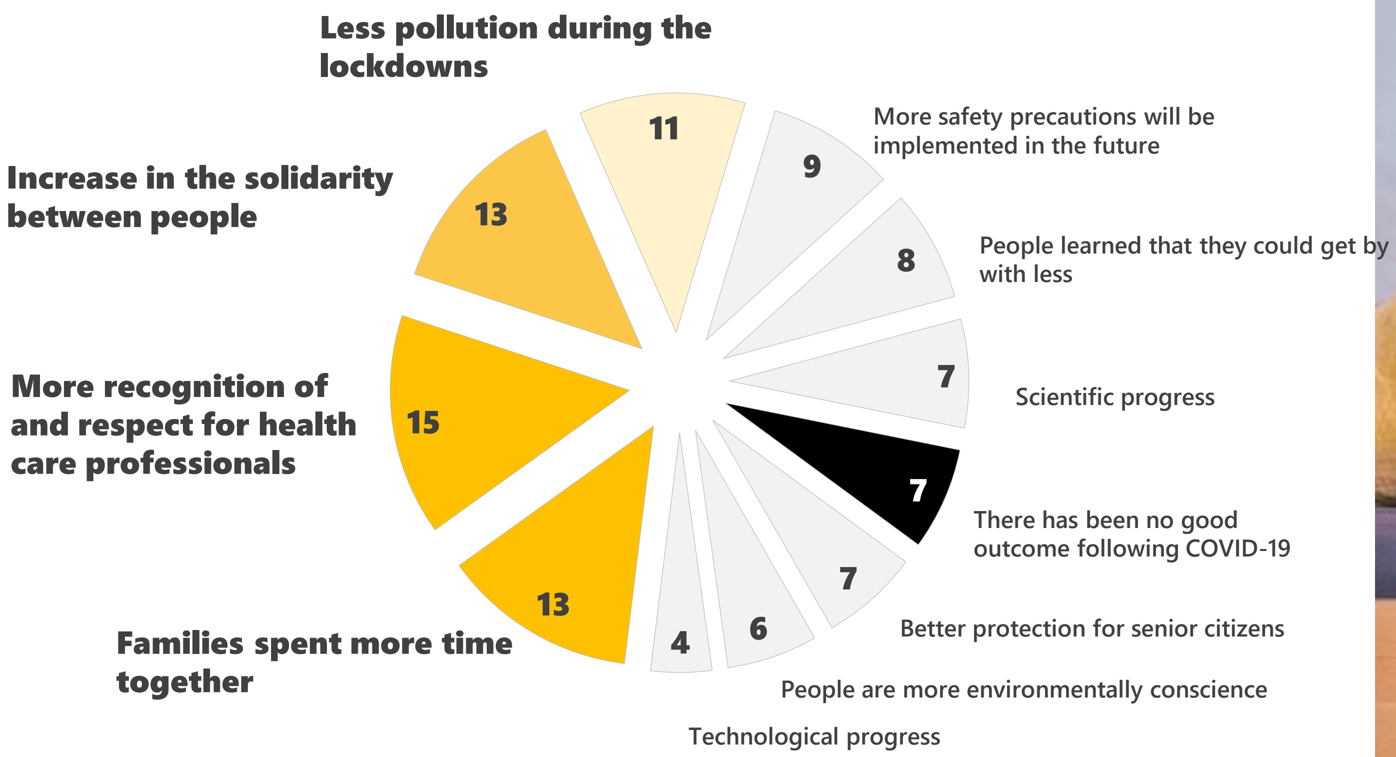
(total base) (n=4.535)



P19. In addition to the unfortunate number of deaths caused by COVID-19, which of the following do you think are the worst and second-worst outcomes of the pandemic?

Which is the most positive outcome of the pandemic?

(total base) (n=4.535)



The recognition of the health professionals, the emerging solidarity and the family support are the most positive aspects of the pandemic

P20. Beyond all the negative consequences, which of the following do you think are the best and second-best outcomes following COVID-19?

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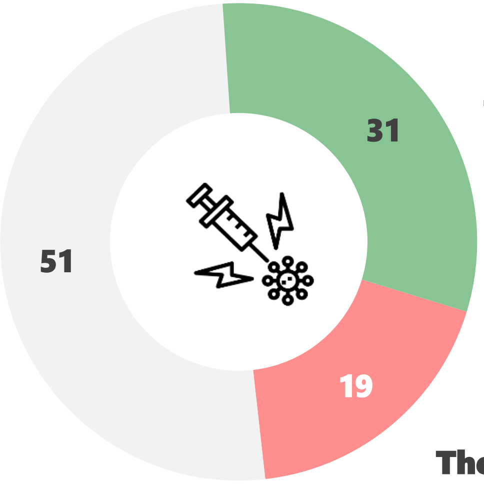
The arrival of the vaccine generates some optimism at the social level:

"Society will improve" says 30%

When a vaccine is available, society in general will be a better one?

(total base) (n=4.535)



The most optimistic:

47% 47% 37%

The most pessimistic:

27% 23%

BETTER	24%	22%	27%	25%	18%	24%	47%	33%	31%	37%	47%
STAYS	58%	56%	50%	54%	55%	59%	42%	47%	57%	44%	39%
WORS	18%	21%	23%	21%	27%	17%	12%	20%	13%	20%	14%

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

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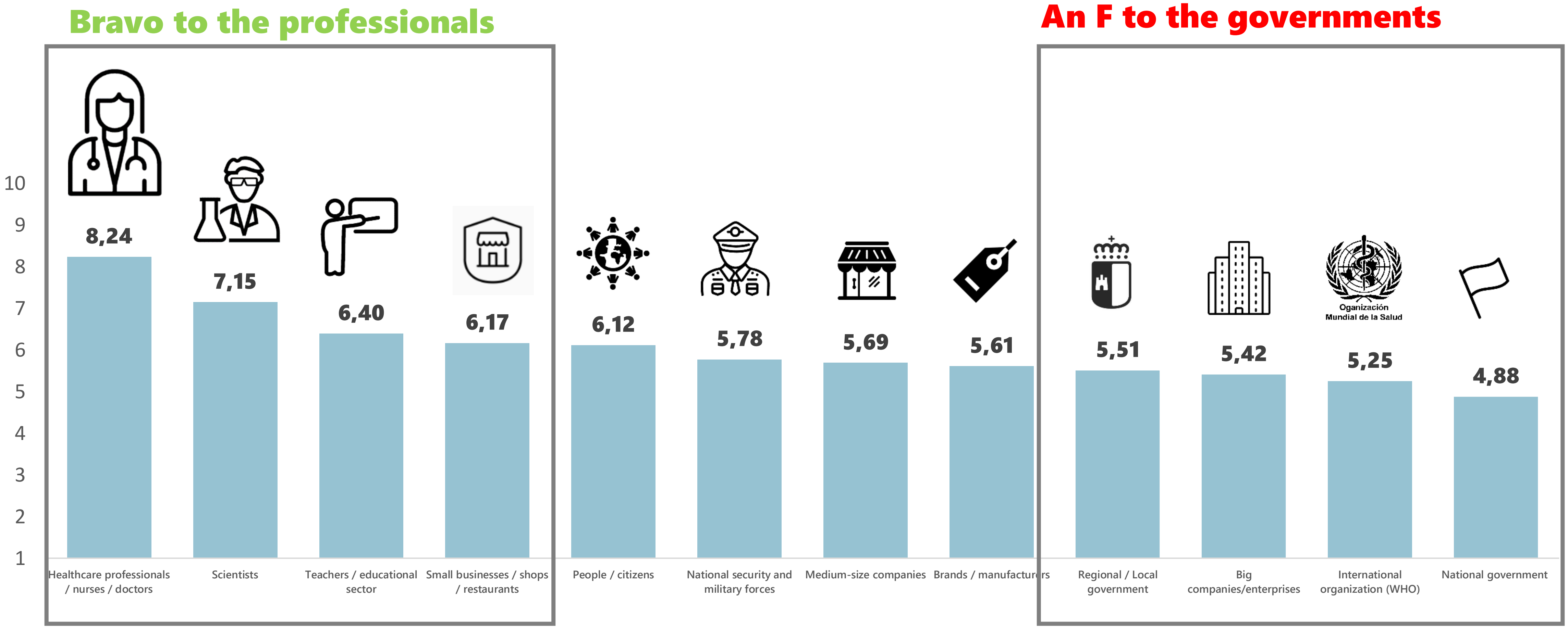
How has the management of the pandemic been assessed? (average scores)

(total base) (n=4.535)



P21. How effective were each of the following in addressing and managing COVID-19 (SCALE = 1 TO 10 WITH 1 BEING NOT AT ALL EFFECTIVE AND 10 BEING EXTREMELY EFFECTIVE)

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Unanimity in recognizing the work of health professionals and scientists. Germany and Argentina are the countries who value their government most. Generally, local governments are better rated though.

	Healthcare professionals	Scientists	Teachers / educational sector	Small businesses	People / citizens	National security and military forces	Medium-size companies	Brands	Regional / local Government	Big compmanies	International organization (WHO)	National government
TOTAL	**8,2**	**7,2**	**6,4**	**6,2**	**6,1**	**5,8**	**5,7**	**5,6**	**5,5**	**5,4**	**5,3**	**4,9**
	8,5	7,5	6,6	7,0	6,4	7,3	6,4	6,0	5,5	6,1	5,4	4,8
	8,2	6,7	6,2	5,8	6,1	5,8	5,5	5,6	5,2	5,3	5,0	4,7
	8,0	7,3	6,0	6,1	6,5	5,5	5,7	5,2	6,6	5,3	6,0	6,7
	8,0	6,7	6,3	6,3	6,6	6,0	6,2	6,2	6,1	6,2	5,1	5,7
	7,6	6,2	5,3	4,8	5,9	5,1	5,0	5,3	5,3	5,3	4,6	4,7
	8,8	7,8	6,6	6,4	5,6	6,7	5,6	5,2	5,8	4,7	4,3	5,6
	9,3	8,6	7,5	6,4	7,5	5,7	5,8	6,5	5,3	5,8	6,4	4,1
	9,1	7,2	6,9	6,7	4,2	4,7	5,2	4,6	5,7	3,7	3,8	3,6
	8,3	7,3	6,5	6,3	5,1	5,9	6,0	5,7	5,1	5,9	5,9	4,7
	7,8	7,2	6,9	6,6	6,4	5,9	6,3	6,3	6,2	6,1	5,7	5,0
	6,6	5,6	5,4	5,4	6,7	5,0	4,8	5,0	4,1	5,0	5,3	4,4

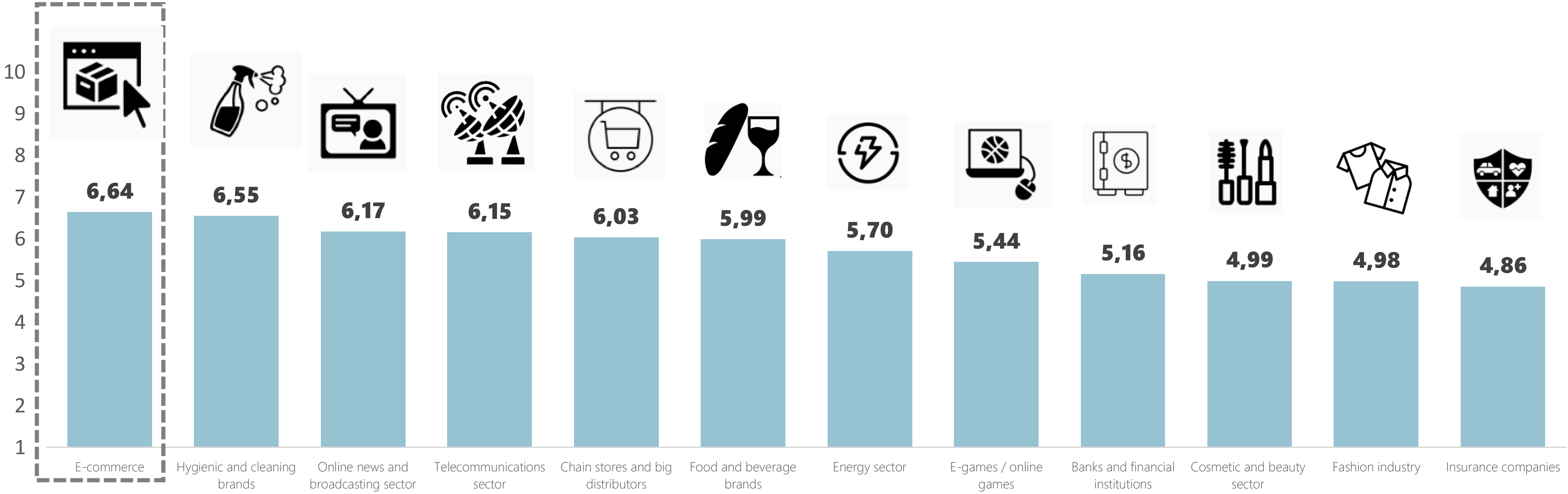
(*) The TOP 3 by country is highlighted in yellow

P21. How effective were each of the following in addressing and managing COVID-19 (SCALE = 1 TO 10 WITH 1 BEING NOT AT ALL EFFECTIVE AND 10 BEING EXTREMELY EFFECTIVE)

How has the reaction of companies been assessed? (Average scores)

(total base) (n=4.535)

Less differences perceived between sectors in the management of the pandemic. Only e-commerce manages to stick-out, at least a little bit.



P22How effective were each of the following types of companies in addressing and managing COVID-19 (SCALE = 1 TO 10 WITH 1 BEING NOT AT ALL EFFECTIVE AND 10 BEING EXTREMELY EFFECTIVE)

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In addition to e-commerce, the sectors of hygiene, information (esp. in LATAM), telecommunications (esp. in Spain and Poland) and distribution (esp. in Europe) are also highly valued

	E-commerce	Hygienic and cleaning brands	Online news and broadcasting sector	Tele-communications	Chain stores and big distributors	Food and beverage brands	Energy sector	E-games / online games	Banks and financial institutions	Cosmetic and beauty sector	Fashion industry	Insurance companies
TOTAL	**6,6**	**6,6**	**6,2**	**6,2**	**6,0**	**6,0**	**5,7**	**5,4**	**5,2**	**5,0**	**5,0**	**4,9**
	6,5	6,7	6,3	6,6	6,6	6,6	6,1	5,8	5,6	5,8	5,9	5,5
	6,1	6,1	5,8	5,9	6,0	5,6	5,6	5,2	4,7	5,0	4,9	4,4
	6,9	6,6	6,5	5,8	6,6	6,7	5,6	5,0	5,0	5,0	5,0	4,9
	7,1	6,6	6,0	6,3	6,5	6,1	5,7	5,7	4,7	5,4	5,6	5,0
	7,2	6,9	6,2	6,7	6,2	6,3	6,5	6,2	5,6	5,0	5,1	5,4
	6,3	6,4	5,8	5,9	5,5	5,4	5,6	5,7	4,3	4,5	4,5	4,3
	7,5	7,1	6,4	6,3	6,1	6,4	5,8	5,1	5,9	5,5	4,9	4,9
	6,3	5,9	5,8	5,2	4,8	4,8	4,6	5,6	3,6	3,6	3,6	3,3
	6,8	7,1	6,5	6,5	6,3	6,3	5,5	5,5	6,0	5,0	4,9	5,3
	7,0	6,9	6,6	6,5	6,5	6,5	6,4	5,9	6,1	5,7	5,7	6,1
	5,2	5,6	6,0	6,1	5,2	5,1	5,3	4,3	5,0	4,4	4,7	4,3

(*) The TOP 3 by country is highlighted in yellow

P22How effective were each of the following types of companies in addressing and managing COVID-19 (SCALE = 1 TO 10 WITH 1 BEING NOT AT ALL EFFECTIVE AND 10 BEING EXTREMELY EFFECTIVE)

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As leading brands, Amazon is mentioned in the TOP10 of 4 of the 5 European countries analyzed. Inditex in Spain, Carrefour in France, Barilla in Italy and Orlen in Poland achieve the top1

TOP 10 BRANDS PER COUNTRY (Europe)

Ranking	Brand	Impressed
1	INDITEX	27%
2	MERCADONA	20%
3	ZARA	15%
4	amazon	11%
5	IBERDROLA	10%
6	Santander	7%
7	carrefour	7%
8	endesa	7%
9	Coca-Cola	5%
10	NIKE	5%

Ranking	Marca	Impressed
1	carrefour	14%
2	amazon	9%
3	E.Leclerc	9%
4	Intermarché	7%
5	orange	7%
6	Auchan	7%
7	L'ORÉAL	5%
8	LVMH	5%
9	NINTENDO SWITCH	4%
10	LIDL	4%

Ranking	Marca	Impressed
1	amazon	12%
2	ALDI	8%
3	REWE	7%
4	LIDL	6%
5	EDEKA	5%
6	DHL	4%
7	trigema	4%
8	T	4%
9	adidas	2%
10	ebay	2%

Ranking	Marca	Impressed
1	Barilla	18%
2	amazon	14%
3	ESSELUNGA	10%
4	AMUCHINA	9%
5	ARMANI	9%
6	CONAD	8%
7	coop	8%
8	FERRERO	5%
9	NIKE	4%
10	Ferrari	4%

Ranking	Marca	Impressed
1	ORLEN	17%
2	Biedronka	6%
3	LIDL	3%
4	allegro	3%
5	orange	2%
6	KGHM	2%
7	LOTOS	2%
8	ROSSMANN	2%
9	T-Mobile	2%
10	Coca-Cola	1%

P23. Please list the top 3 brands that come to mind that have impressed you the most based on their activities during the COVID-19 pandemic

Predominant role of detergent brands and supermarket chains in the American countries analyzed. Amazon top 1 in the United States

TOP 10 BRANDS PER COUNTRY (America)

Ranking	Brand	Impressed
1	Ayudín	13%
2	Coca-Cola	7%
3	carrefour	7%
4	mercado libre	6%
5	natura	5%
6	COTO	5%
7	Arcor	5%
8	Marolio	5%
9	Dia %	4%
10	Lysoform	3%

Ranking	Marca	Impressed
1	Itaú	10%
2	ambev	10%
3	OMO	8%
4	Nestlé	8%
5	magazineluiza	7%
6	ifood	7%
7	natura	6%
8	Unilever	5%
9	Ypê	5%
10	Santander	4%

Ranking	Marca	Impressed
1	Lider	17%
2	Clorox	9%
3	Unimarc	9%
4	Jumbo cencosud	9%
5	WOM	8%
6	entel	6%
7	Colun	6%
8	Lysoform	5%
9	Coca-Cola	5%
10	CCU	4%

Ranking	Marca	Impressed
1	Coca-Cola	18%
2	Grupo Bimbo	16%
3	Walmart	10%
4	Cloralex	8%
5	Clorox	7%
6	Lysol	7%
7	Pinol	5%
8	amazon	4%
9	Corona	4%
10	Soriana	3%

Ranking	Marca	Impressed
1	amazon	22%
2	Walmart	19%
3	Ford	7%
4	Target	6%
5	Google	5%
6	Nike	5%
7	Clorox	4%
8	Lysol	4%
9	Apple	3%
10	GM	3%

P23. Please list the top 3 brands that come to mind that have impressed you the most based on their activities during the COVID-19 pandemic

Shopper experience: during and after COVID

Shopper experience: during and after COVID

Consumers remain concerned about possible exposure to the virus: more in America, less in Europe, but fear persists.

This implies a disturbing shopping experience: more than 80% do not feel comfortable while shopping. 25% of consumers anticipate long-term insecurity.

To alleviate the concern during the shopping experience, disinfection and distance are essential, but we **observe effects on the shopper's attitudes towards new channel**s:

- Relevance of **proximity commerce**
- Relevance of **e-commerce**

40% of the consumers would accept a certain **price increase as a toll on these channels**

During the pandemic:

- 50% have **reduced their usual stores** (we went from 3 to 2 stores)
- 40% have **spent more** (supply in USA and Nigeria), (new items in Spain, Italy, LATAM)
- Facing out of stocks (80%) consumers **changed brands** (80%), and this **infidelity will remain** (30% no longer return, 30% will alternate)

Beyond the brand topic, **a lasting change in shopping habits is anticipated**: 60% believe that they will change as a result of the pandemic, and verbalize a renewed relevance of **PRICE**, **QUALITY**, **SUSTAINABILITY**, and **SOCIAL COMMITMENT**, to the disadvantage of notoriety per se.

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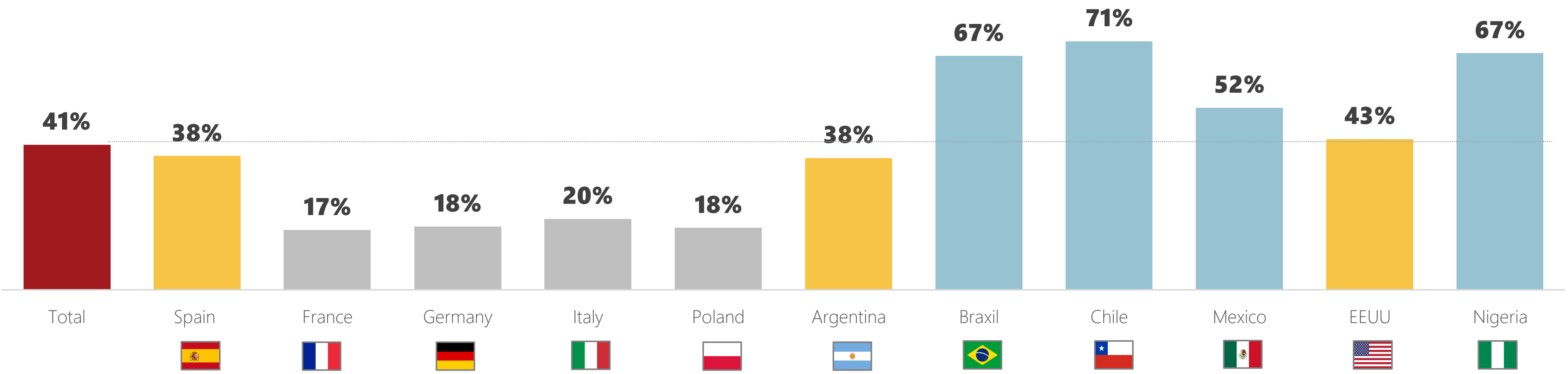
Currently the greatest concern about COVID-19 exposure when shopping is centered in LATAM and Nigeria. Eye-catching is the low concern in Italy, having been one of the countries most affected by the pandemic, while in Spain fear does persist.

CURRENT concern about COVID-19 exposure when shopping (% very concerned)



	Total	Spain	France	Germany	Italy	Poland	Argentina	Braxil	Chile	Mexico	EEUU	Nigeria
Variation in concern versus the beginning of the pandemic	+16	+9	+2	-3	-4	-2	+18	+47	+47	+37	+2	+15
Deaths per 1M inhabitants (June 24th)	61	580	451	105	568	33	18	203	173	133	350	3

P2 As you think about going to the supermarket now, how would you rate your level of concern regarding the possibility of being exposed to the coronavirus? Would you be...

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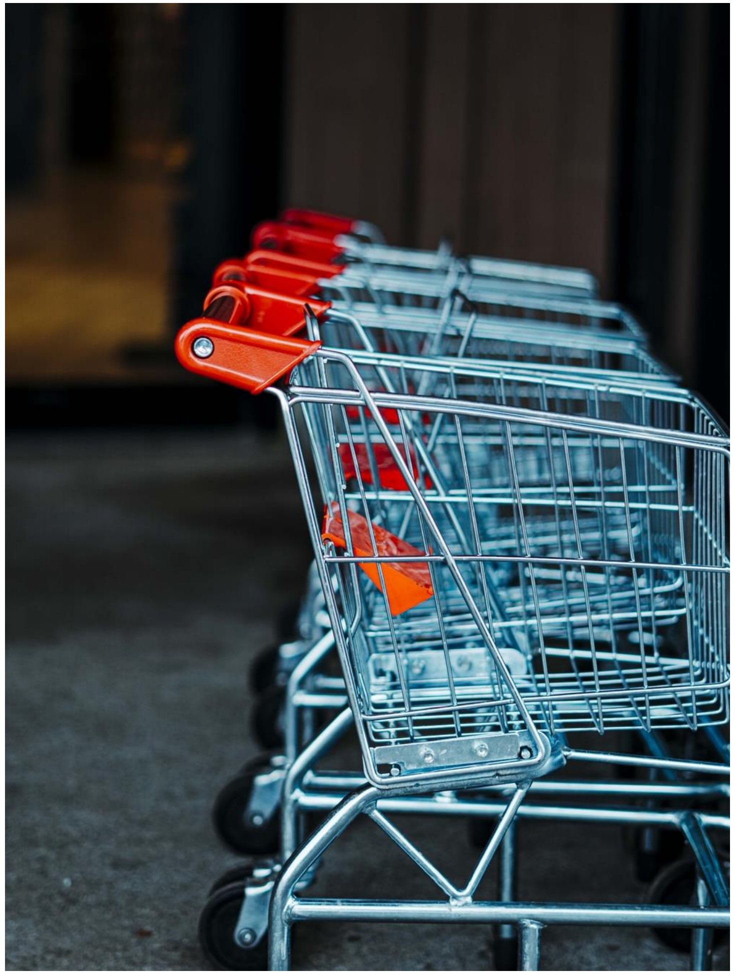
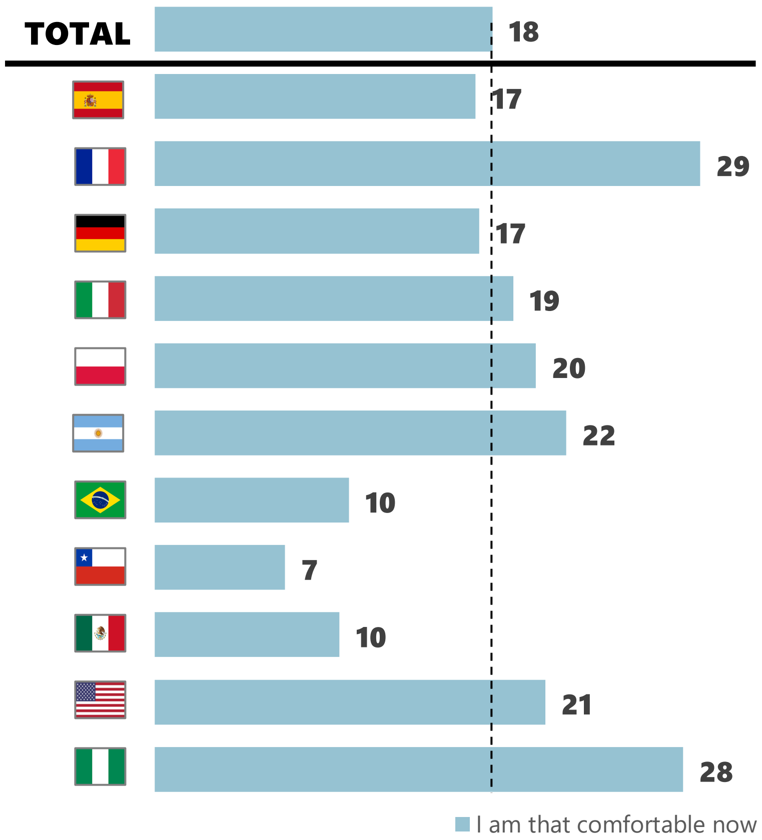
A disturbing User Experience: Currently, less than 20% feel comfortable while shopping. Only 10% in the case of LATAM



I feel comfortable shopping NOW



P10 How long do you think it will take for you to once again feel comfortable shopping at supermarkets like you did before COVID-19?

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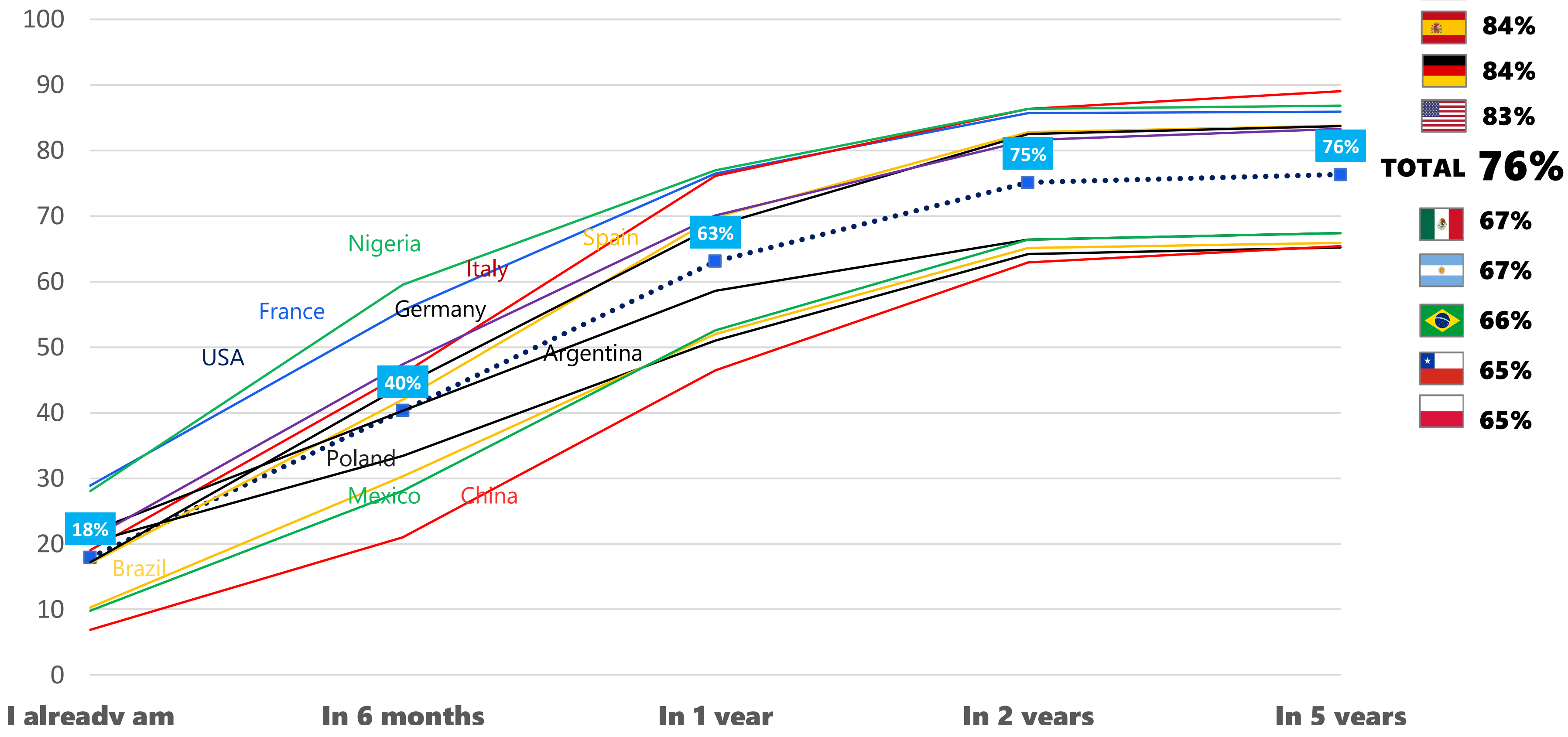
A slow recovery of confidence when shopping is perceived, even slower in LATAM and in Poland.

When will we feel comfortable again, shopping at the supermarkets?



P10 How long do you think it will take for you to once again feel comfortable shopping at supermarkets like you did before COVID-19?

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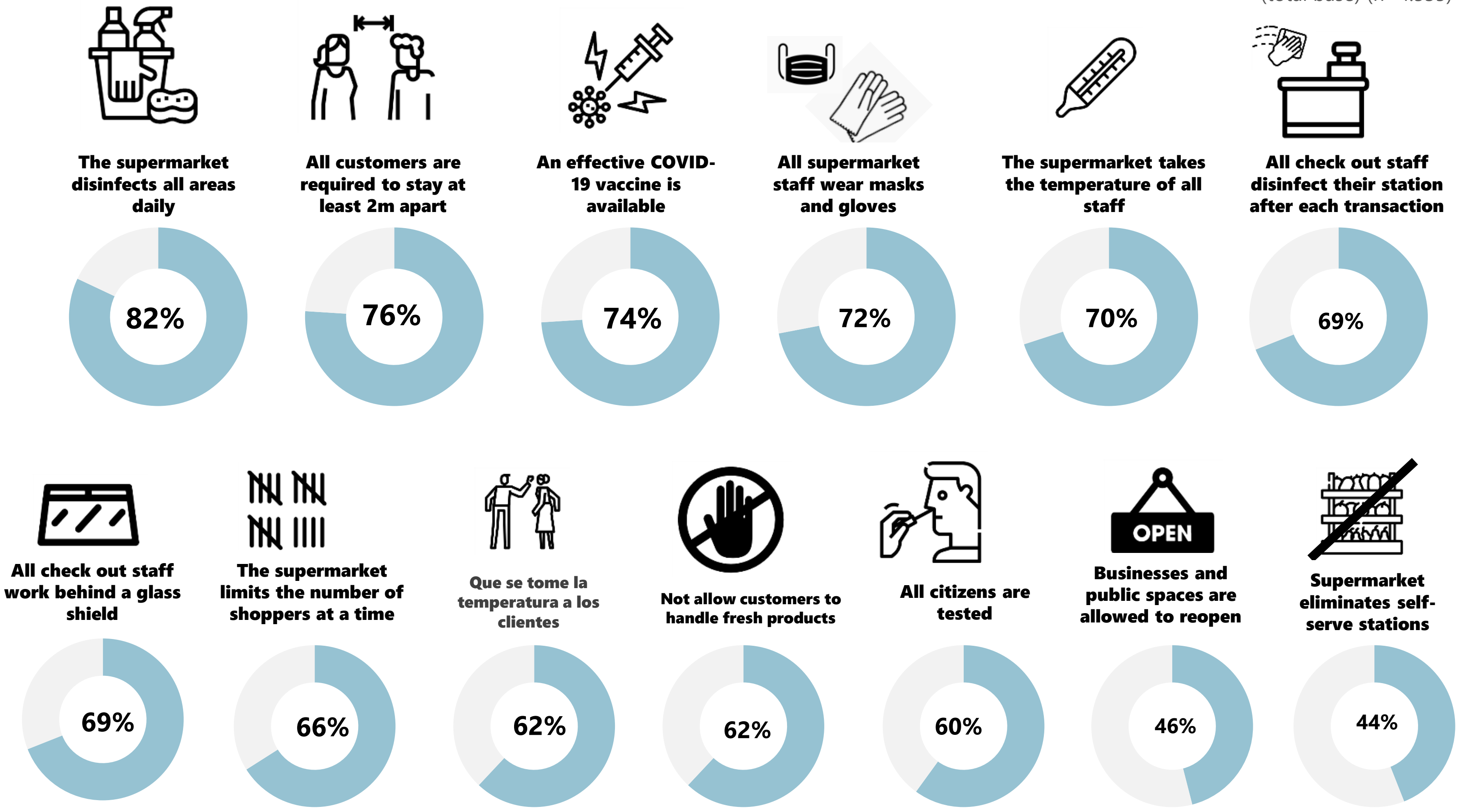
As long as there is no vaccine, disinfection and distance improve the shopper's UX

Improvements to feel more comfortable shopping (% Yes)

(total base) (n=4.535)



P9. Which of the following measures will make you feel more comfortable shopping at supermarkets? (Yes, Maybe, No)

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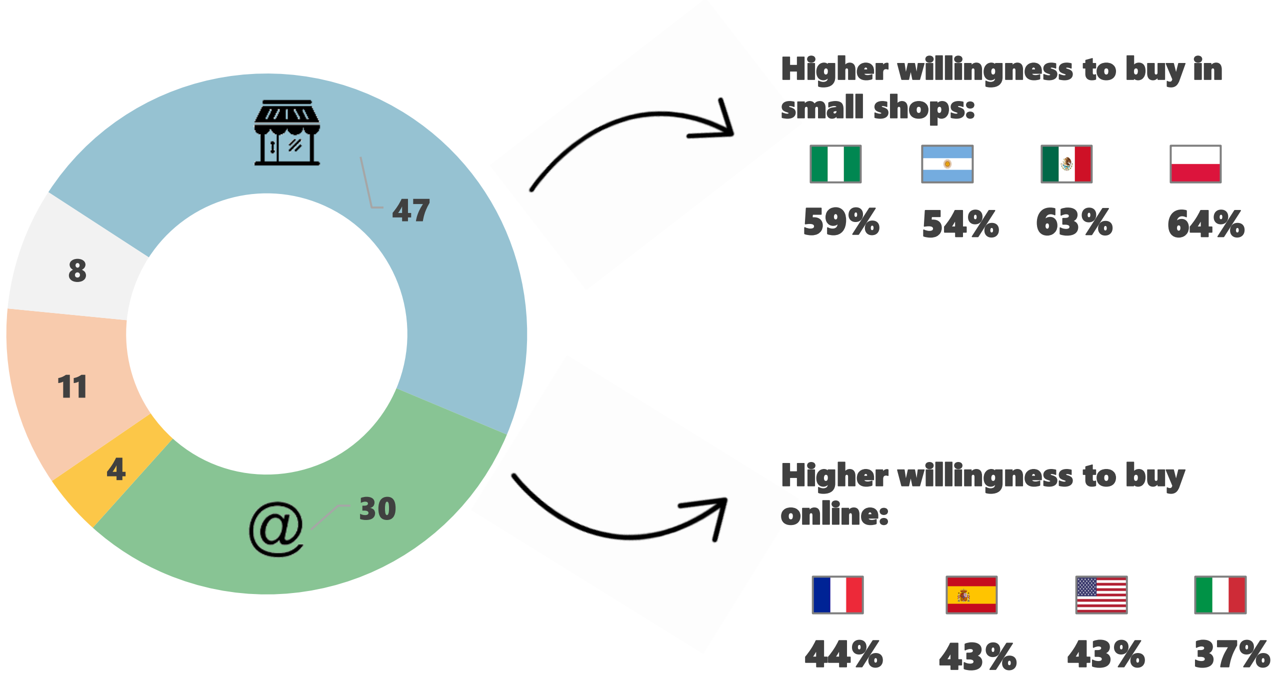
Insecurity favors small businesses (LATAM, Nigeria and Poland) and e-commerce (Europe)

If not feeling comfortable after COVID-19: what do we do?

- Shop at smaller, less crowded shopss
- Shop online
- Shop at smaller, less crowded shops
- Shop at supermarkets that deliver my purchases
- Pickup my pre-ordered purchases from the store

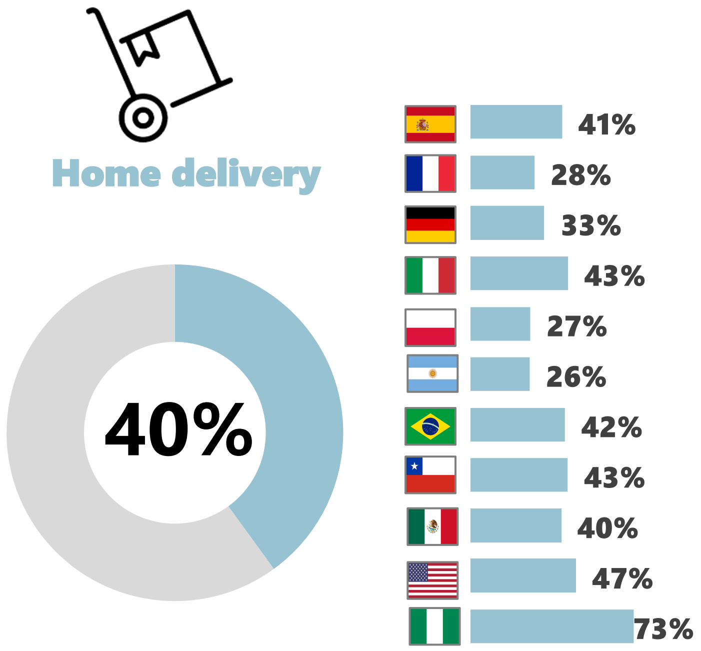


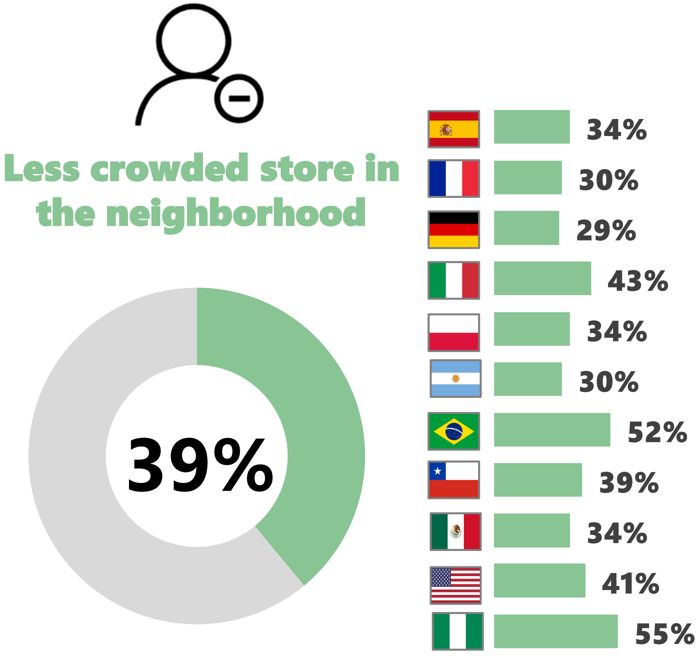
(base: they may not feel safe) (n=3.024)

P12. If you are not comfortable shopping at supermarkets after the threat of COVID-19 expires, what will you do instead?

Increasing willingness to a pay more for home delivery or proximity shopping

Willingness to pay more in food stores (% Yes)





P3. Are you willing to pay more for your groceries if... (Yes/No/Maybe)

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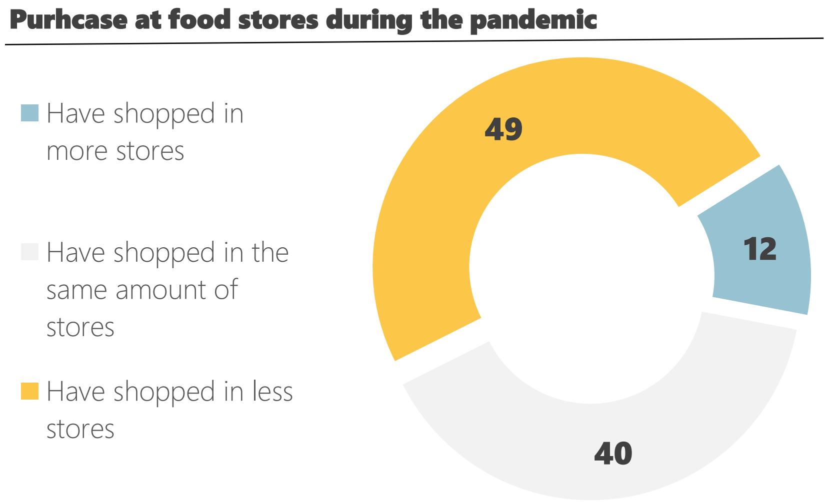
1 in 2 consumers has reduced the number of supply stores during the pandemic



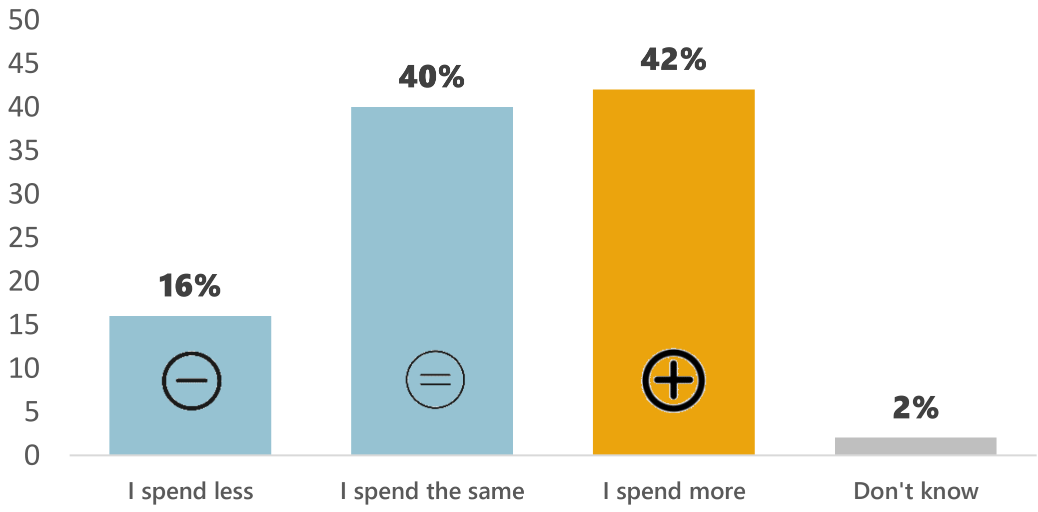
AMOUNT OF REGULARLY VISITED STORES

Before	During
3	2

P4. Before the crisis, at about how many stores did you shop regularly for your food products and other household items (paper products and cleaning supplies, for example)?
P5. During the crisis, at how many stores did you shop, (either in-person or online) for your food products and other household items?

4 out of 10 consumers have increased their spending on food and household products

Spending on Food and Household Products

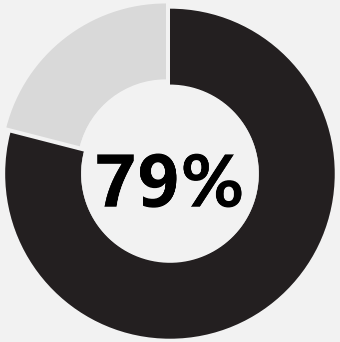


P7. As you think about how much you currently spend on groceries and household items like paper products and cleaning supplies compared to how much you spent before the coronavirus outbreak, would you say you spend...?.

High brand infidelity during the pandemic when facing of out of stock

The usual Brand is not available

(total base) (n=4.535)



If your brand was gone, what did you do?

(base: haven't found their habitual brand (n=3.548)

77%

DISLOYAL

33%

LOYAL

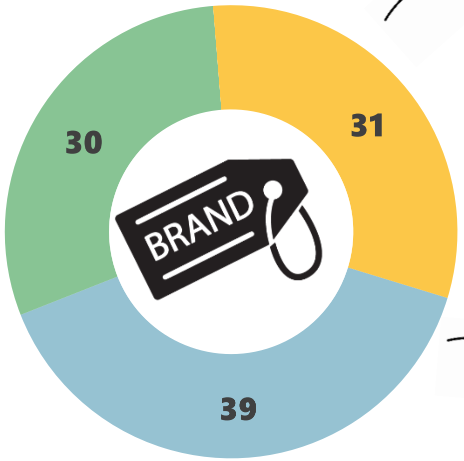
P13. During the past few months, what have you done if the brand of product you buy most often at the supermarket is sold out?

30% of those consumers don't come back anymore: higher infidelity in LATAM, Italy

Those who have changed, will they go back to their favorite brands?

(base: have bought new brands which weren't their usual (n=3.312)

- I'll buy my preferred brands again
- I'll continue to buy the new brands I tried during the crisis
- I'll alternate because now I like the new brand too



Those who would vary the most from brand to brand:

49% **46%** **43%** **42%** **40%**

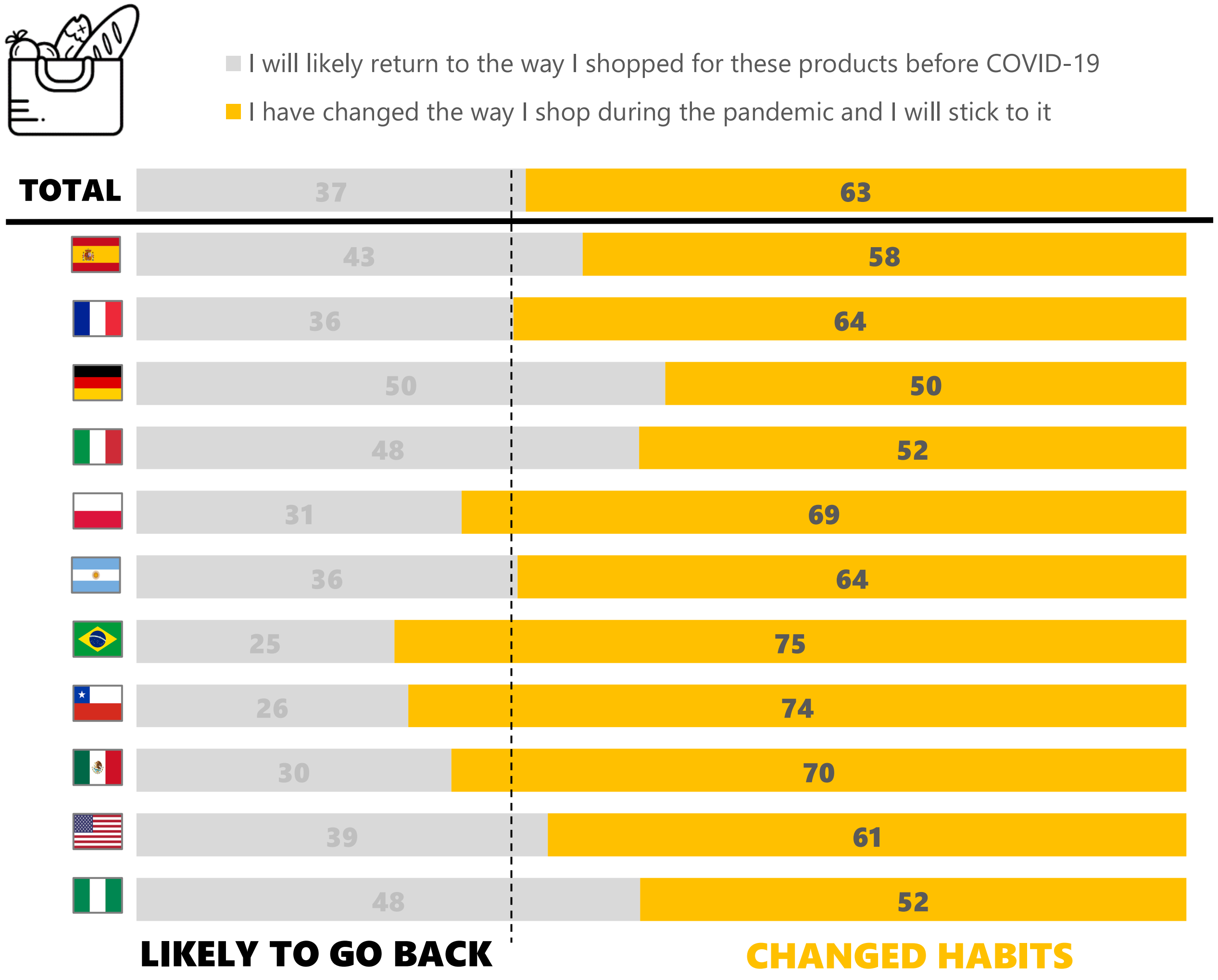
The most brand loyalists:

66% **64%** **53%**

P14. What do you think you will do when this crisis is over and your preferred brands are available again?

Punto de Fuga
The Value of People Insight

Back to the former way of shopping?



60% anticipate a lasting change in their shopping habits.
Even higher percentage (%) in LATAM

P8. When the threat of COVID-19 goes away, how do you think that will affect your shopping habits regarding food products and other household items?

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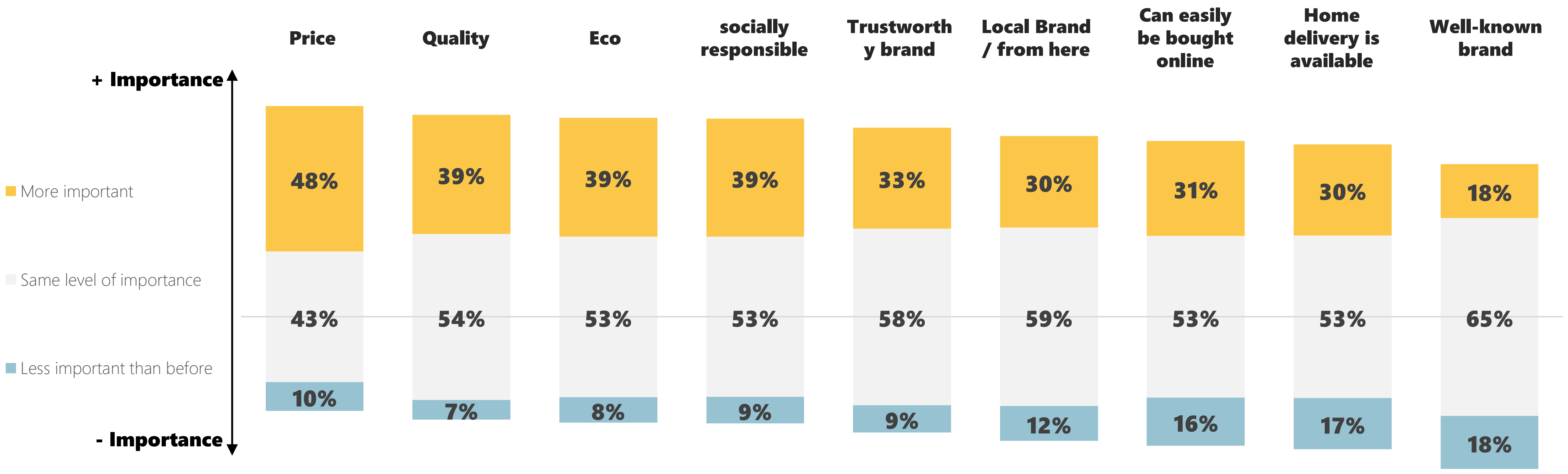
Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

After COVID-19 price will become even more relevant for 48% of the consumers, but eco- and socially responsible will also. Notoriety "per se" loses value

Evolution of the importance of different shopping aspects

(total base) (n=4.535)



Difference (+/-)	+38	+33	+31	+30	+24	+19	+15	+13	0

P15.Compared to how important each was before COVID-19, how important will each of the following be in the future as you decide what brands of food products and household items to buy?

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Anticipating the New Normal: Expectations of Future Behaviour

Anticipating the New Normal

The global pandemic has changed our current behavior but also our future expectations.

This **change in habits is shaping the so-called "new normality",** a new reality that the WHO itself considers difficult to reverse, at least in the short, medium term.

Even though there are some differences between countries, in general the consumers expect more time with their families, to care more for their diet, a more responsible consumption and increasing digitalization (e-commerce, e-learning, teleworking). At the other extreme, shopping centers, restaurants, public transport and cultural activities in general show a decline in future demand in all the countries analyzed.

- *We will do sport, but we will go less to the gym*
- *Our leisure will be reconverted, and the shopping center will not be the first option*
- *We will make more online purchases (big jump in Spain), although we will promote the local commerce*
- *We'll get around, but more on foot and less on public transport.*
- *We will use our private vehicle, less airplane, and do more local tourism*
- *We'll spend more time with family, and not so much with friends*
- *E-learning or teleworking will be an option with a certain upturn but not a majority*
- *The ecological aspect is important, but above all, care, a healthy diet and recycling. And responsible consumption will increase*

Although we cannot forget that **we will continue to depend on the existence of the virus and the evolution of the pandemic. This may condition us to new changes and a new "new normal".**

Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

In the future we will spend more time with the family which will gain weight compared to relationships with friends.

Perceived variation:

PERSONAL RELATIONS

+18%

Spend time with family

+31%

Spend time with friends

+6%

P11 Do you think that during the 12 months after the threat of COVID-19 expires, that you will do less, about the same, or more of each of the following activities compared to the 12 months before COVID-19 started?

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In the future we will spend more time on our health and that of our environment.

Perceived variation:

HEALTH AND CARE

+17%

Follow a healthy and balanced diet	**+21%**
Buy environmentally friendly products	**+21%**
Recycle and reuse	**+20%**
Participate in sports	**+8%**

P11 Do you think that during the 12 months after the threat of COVID-19 expires, that you will do less, about the same, or more of each of the following activities compared to the 12 months before COVID-19 started?

Working from home and online training are habits that will grow in the future although they will not be in the majority.

Perceived Variation:

WORK

+9%

Work from home **+10%**

Participate in e-learning courses or webinars **+9%**

P11 Do you think that during the 12 months after the threat of COVID-19 expires, that you will do less, about the same, or more of each of the following activities compared to the 12 months before COVID-19 started?

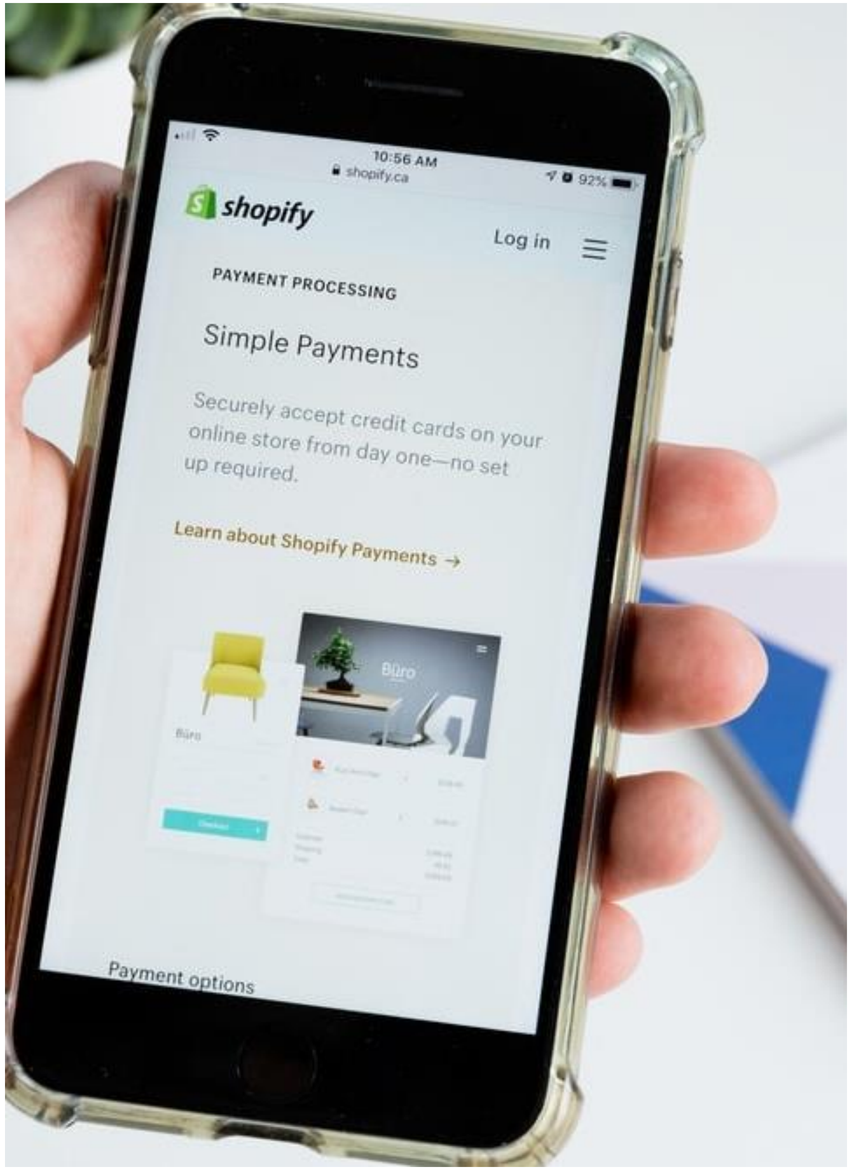
More online shopping is expected, with less impact on food. This tendency will coexist with the trend to proximity purchase

Perceived Variation:

SHOPPING

+5%

Purchase products online	+10%
Purchase items from neighborhood shops	+6%
Purchase food products online	+3%
Request home delivery for food and restaurant purchases	-1%



P11 Do you think that during the 12 months after the threat of COVID-19 expires, that you will do less, about the same, or more of each of the following activities compared to the 12 months before COVID-19 started?

In mobility, we will increase walking or preferring the own vehicle over trips on public transport.

Perceived Variation:

MOBILITY

-10%

Drive your own vehicle	+13%
Walk to buy groceries and household items	+11%
Travel within the country	-3%
Travel by air	-17%
Travel to a foreign country	-19%
Use public transportation	-22%

P11 Do you think that during the 12 months after the threat of COVID-19 expires, that you will do less, about the same, or more of each of the following activities compared to the 12 months before COVID-19 started?

It is assumed that leisure time will be reinvented; fewer visits to shopping centers, bars and restaurants; festivals and cinema and theatre are envisaged.

Perceived Variation:

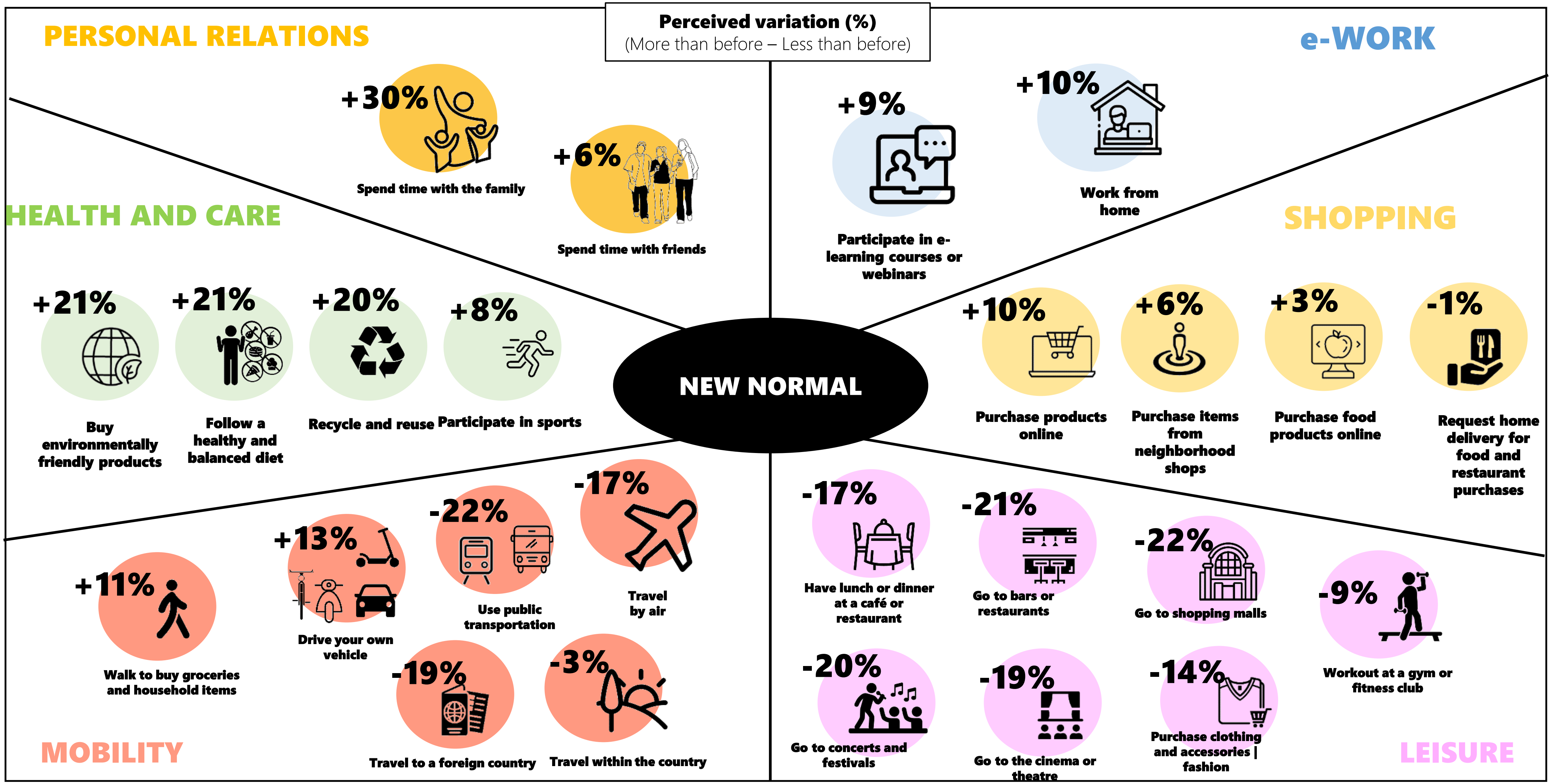
LEISURE

-17%

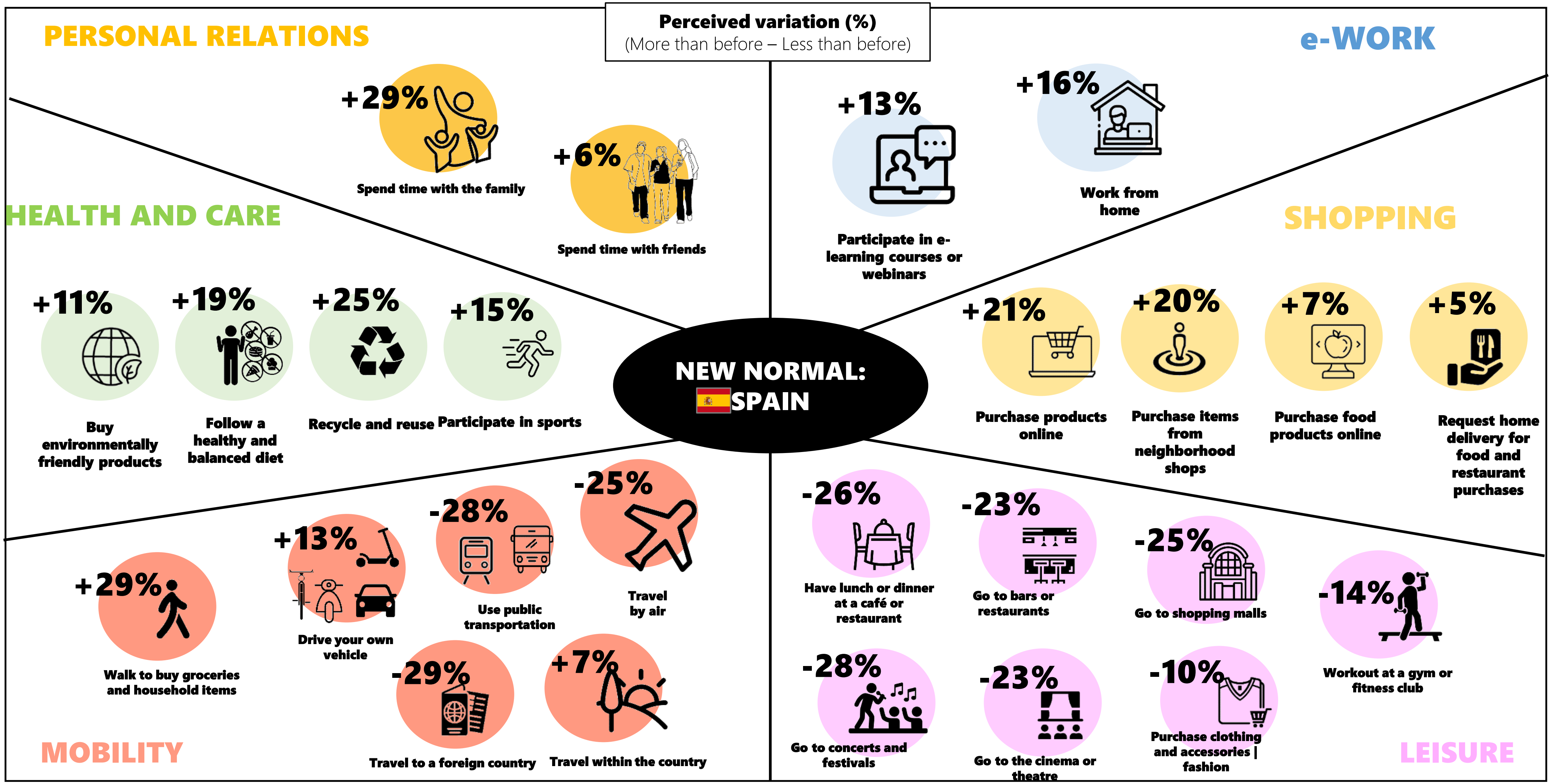
Workout at a gym or fitness club	-9%
Purchase clothing and accessories	-14%
Have lunch or dinner at a café or restaurant	-17%
Go to the cinema or theatre	-19%
Go to concerts and festivals	-20%
Go to bars or restaurants	-21%
Go to shopping malls	-22%

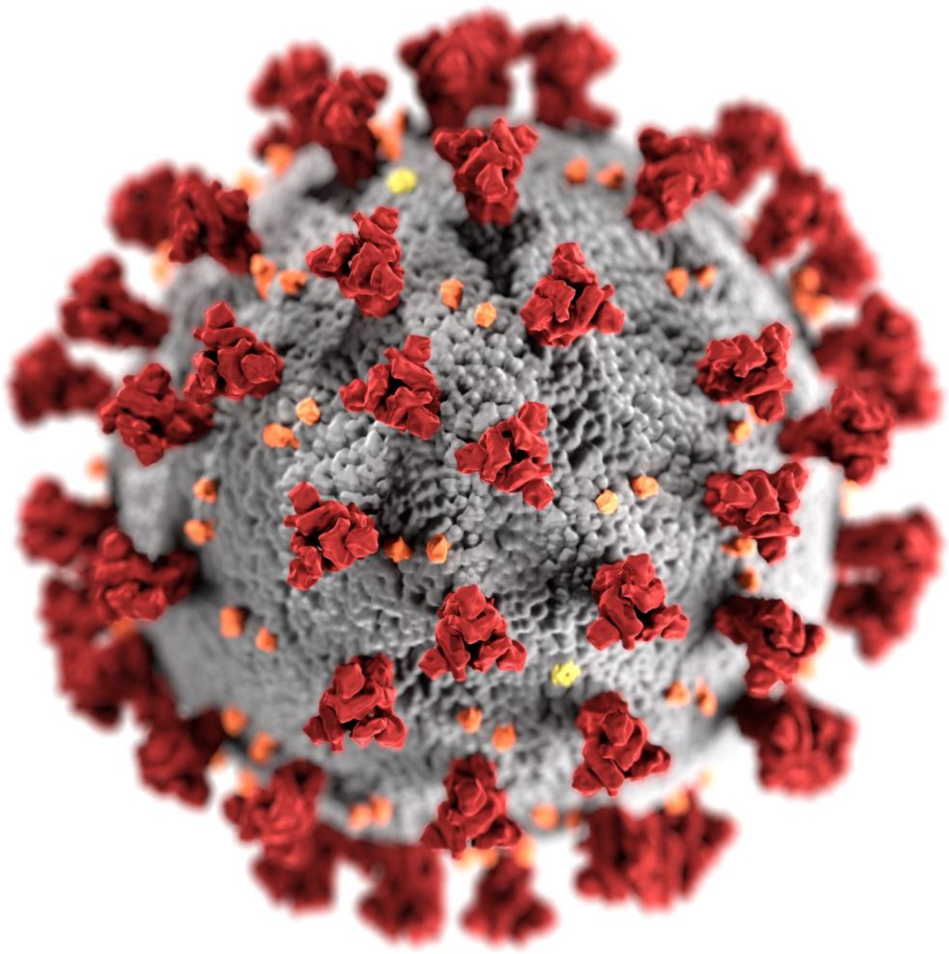
P11 Do you think that during the 12 months after the threat of COVID-19 expires, that you will do less, about the same, or more of each of the following activities compared to the 12 months before COVID-19 started?

Anticipating the New Normal: Expectations of Future Behavior



Anticipating the New Normal: Expectations of Future Behavior





A **dynamic, changing "new normal"** in the hands of the evolving pandemic which requires continuous exercise by brands to be attentive, and **continue to listen and understand the consumers and the market.**

Only in this way the brands and manufacturers will be able to offer an adequate response at all times.

ARTIS the result network

This report has been prepared by the Team of Punto de Fuga based on the data outcome of this international study.

The ARTIS network is currently made up of 16 companies with a presence in 56 countries.

ARTIS
the result network

A global market research network for transnational customer insights and market strategies.

Spain Punto de Fuga	Italy Apertamente	Germany Strategy Routes	France Cyble
Poland SODA Maket Research	Nigeria Webhaptic	Mexico Tangram	United States SRP
Brazil Perception	Argentina Datos Claros	Chile Datos Claros	

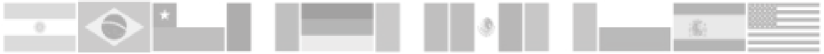
Companies of the ARTIS network who have participated in this study

https://artisnetwork.com/

www.puntodefuga.es

Anticipating the new normal

Global references and orientations



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