Punto de Fuga
The Value of People Insight

From the New Normal to Reality

Post COVID experiences and expectations

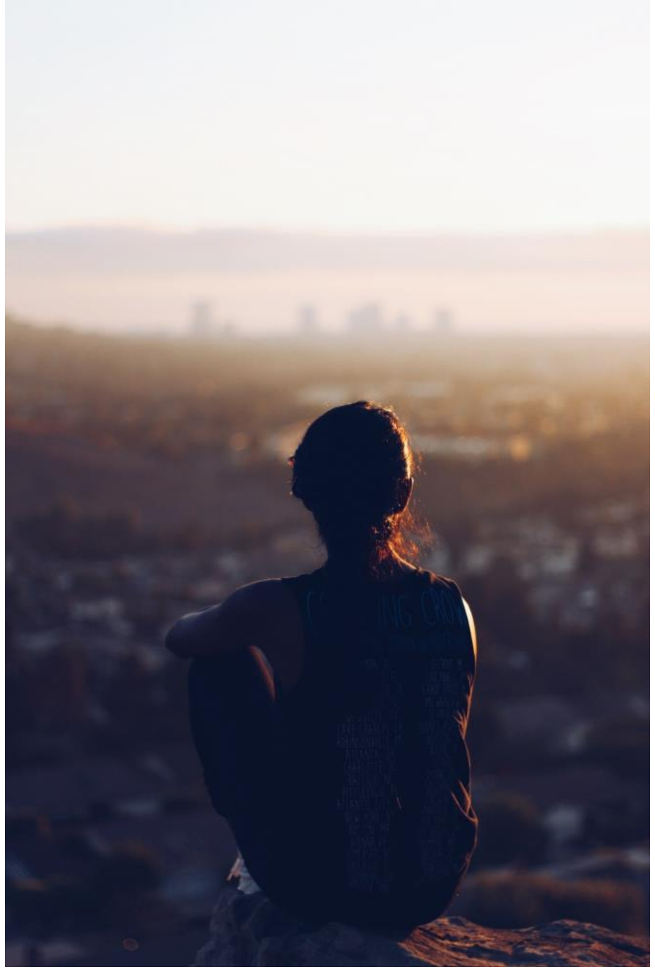
3rd Wave

September 2021

Punto de Fuga is a member of the international network **ARTIS**

A graffiti. **@ccbotanic (Unsplash)**

PROJECT CONTEXT



This is the third edition of the study "anticipating the new normal".

In February/March 2020, the rapid spreading of a virus, mostly unknown until then, burst into our lives. It threatened the status quo, and caused the worst pandemic of the last 100 years, worldwide. It still has terrible effects not only with regards to health but also with regards to psycho-sociological and economic issues.

Three months later, in **June 2020**, after a first devastating pandemic wave, we considered it necessary to undertake a study that would allow us to get closer to the reality we had experienced as a society; to listen to how people felt, how shopping habits had changed, to know which institutions, companies or brands people had felt more loyal to, … Above all we wanted to realize a study that would determine what people's **future expectations** were. We wanted to begin to distinguish under which axes the so-called "new normality" was configured. And, if this was homogeneous or showed differentiated declinations by countries or regions.

In **December 2020**, after almost a year in pandemic, the virus continued to be the protagonist: it kept us constantly attentive to the latest developments at the ICUs and risk areas. Words like "quarantine", "confinement", "PCR", "face mask", or "bubble groups", were already an integral part of our daily lives. The second edition of the study then showed that fatigue was taking its toll on a disenchanted society. But it also showed that vaccines brought hope though were projected to be available in the medium term only. That edition also confirmed that COVID has acted as a particle accelerator in many areas of our lives: a **catalyst for change**, which in certain areas is irreversible. There is no turning back.

In **July 2021** a part of the population was already vaccinated (although with large differences by country), but still there were spikes and waves of infections, and there still wasn't a clear idea of how to "exit from the tunnel". Before this backdrop **Punto de Fuga** and the **ARTIS** network have carried out this third edition of the study (we still do not know if it will be the last). Again we wanted to put the thermometer, take the pulse of society and contrast which of these changes have come to stay.

COVID-19 as a 'TOTAL SOCIAL FACT' marks a turning point that re-establishes the cardinal points of society. Moving forward to this new reality allows us to continue to be in tune with the needs of the market.

Methodology details

International Study - 3rd Wave

3,037 online interviews

10 minutes LOI

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

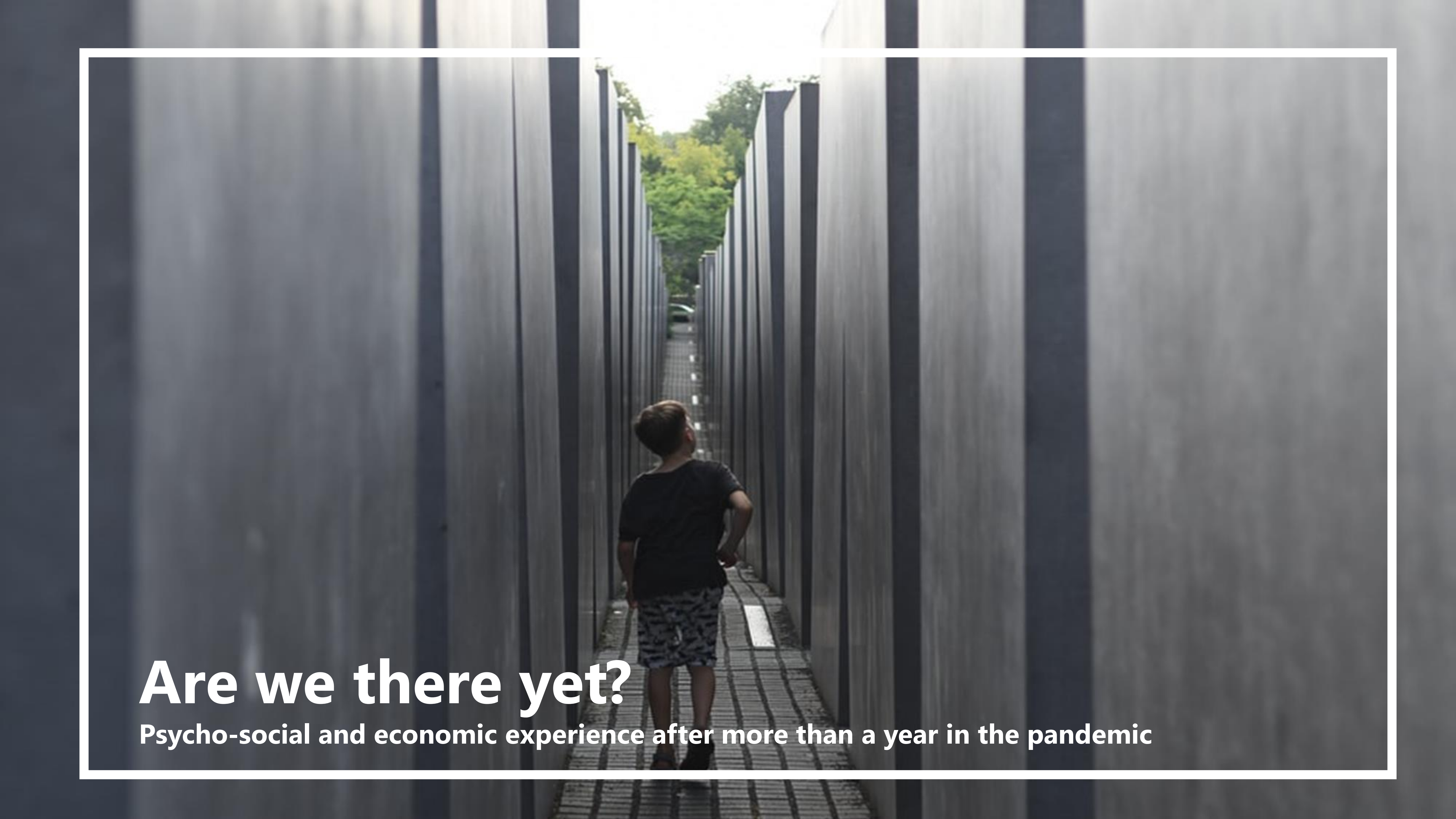
Carried out between
12 to 18 July 2021

Sampling error (95% CI):
± 1.79% globally
± 5.66% per country

Test countries:

Spain **France** **Germany** **Italy** **UK**

Argentina **Brazil** **Chile** **Mexico** **USA**



Are we there yet?

Psycho-social and economic experience after more than a year in the pandemic

We still are in the pandemic

Cases of Coronavirus:

231.895.916

Deaths:

4.749.498

Vaccinated:

6.102.707.312

Last update: 27-Sep-2021

Updated at: *https://coronavirus.jhu.edu/map.html*

A reality that is cyclical and generates uncertainty

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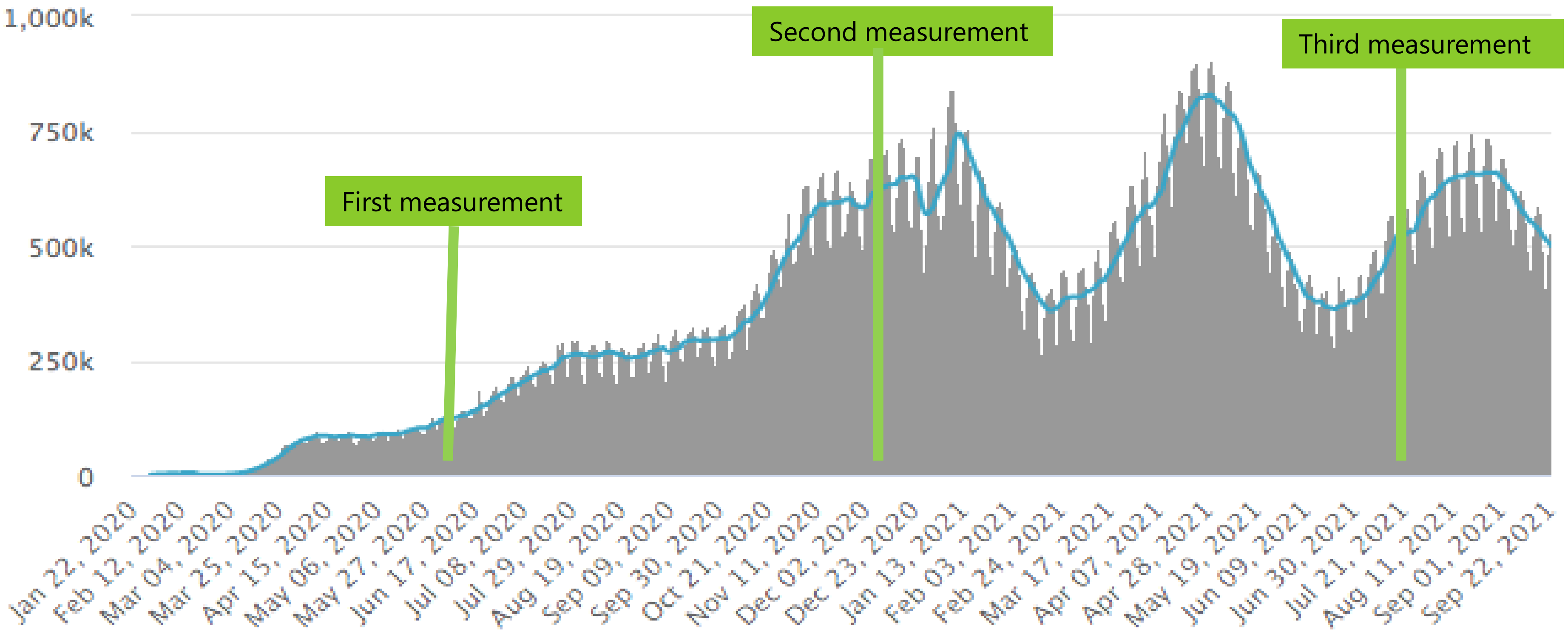
In **July there was** a worldwide **upturn in the number of cases** due to the irruption of the Delta variant and the beginning of the de-escalation in some countries. In **September, a new truce.**

New cases daily



Data updated as of 23 September 2021. Source: *worldometers.info/coronavirus*

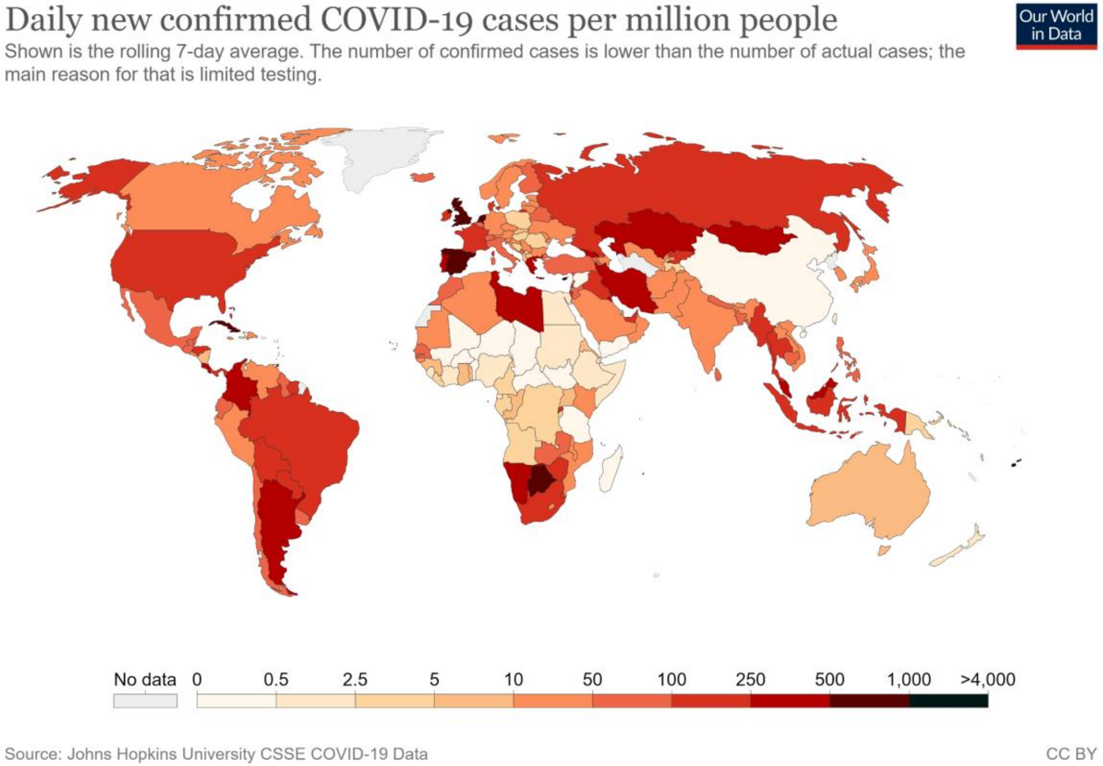
Measurements "ANTICIPATING THE NEW NORMAL".

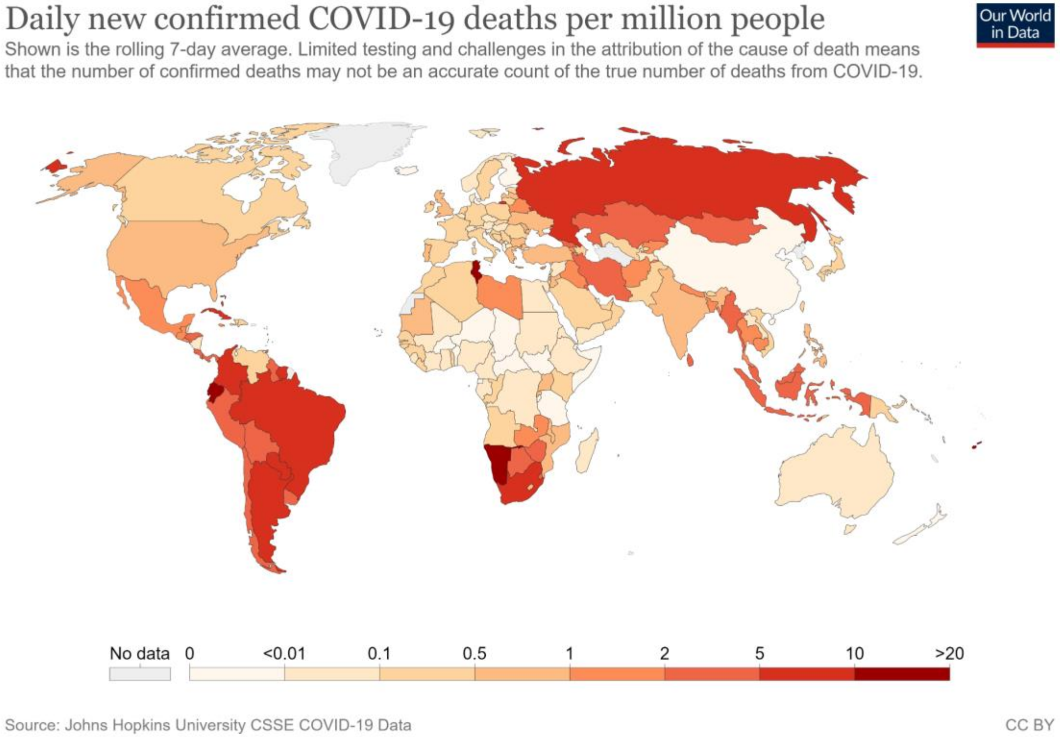
A new player

More cases, but reduced mortality thanks to vaccines

New cases of COVID were on the rise in July in Europe, the United States and Mexico. Spain and the United Kingdom were the countries with the highest rate of new cases.

Although the number of deaths was contained in those countries with higher vaccination rates, while it was more devastating in LATAM (with lower vaccination levels).





Data as of July 2021, time of fieldwork

Vaccination comes at different speeds

Which keeps us away from herd immunity and in an inner state of being constantly alarmed.

	Doses administered	Fully vaccinated	% of population fully vaccinated
Globally	**6.102 M**	**2.573 M**	**33.1%**
	69,7 M	36,4 M	**77,1%**
	93,8 M	43,9 M	**65.4%**
	106,9M	53,1 M	**63,9%**
	84.0 M	40,5 M	**67,3%**
	93,5 M	44,7 M	**67,3%**
	50,8 M	21,4 M	**47,5%**
	231,8 M	87,1 M	**41,2%**
	31,5 M	14,1 M	**73,8%**
	99,2 M	44,5 M	**35,2%**
	390,1 M	183,7 M	**55,7%**

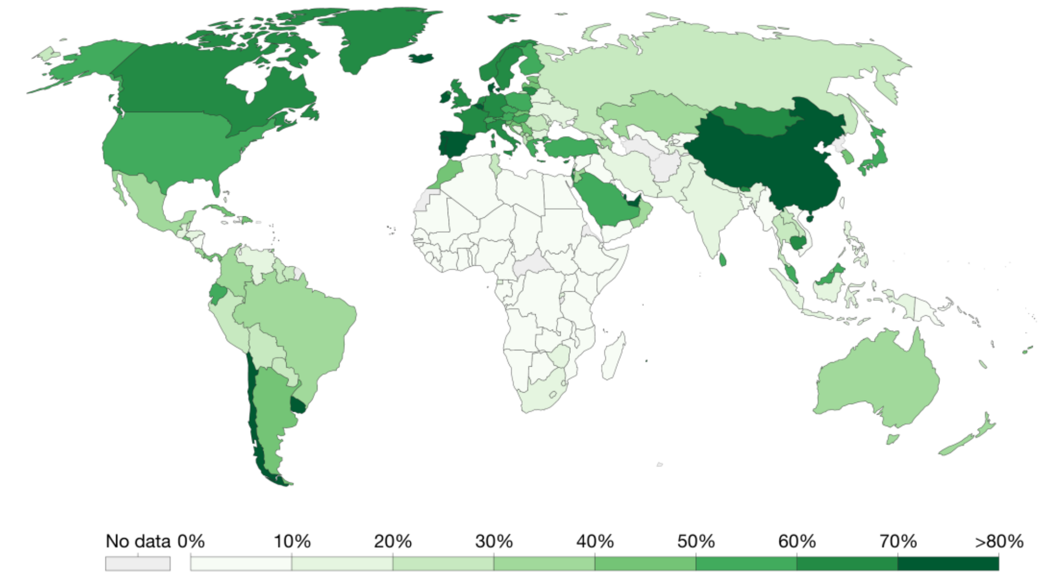
* complete guideline. Data 27 Sept 2021

33% of the world's population is vaccinated*.

Share of the population fully vaccinated against COVID-19

Total number of people who received all doses prescribed by the vaccination protocol, divided by the total population of the country.

Our World in Data

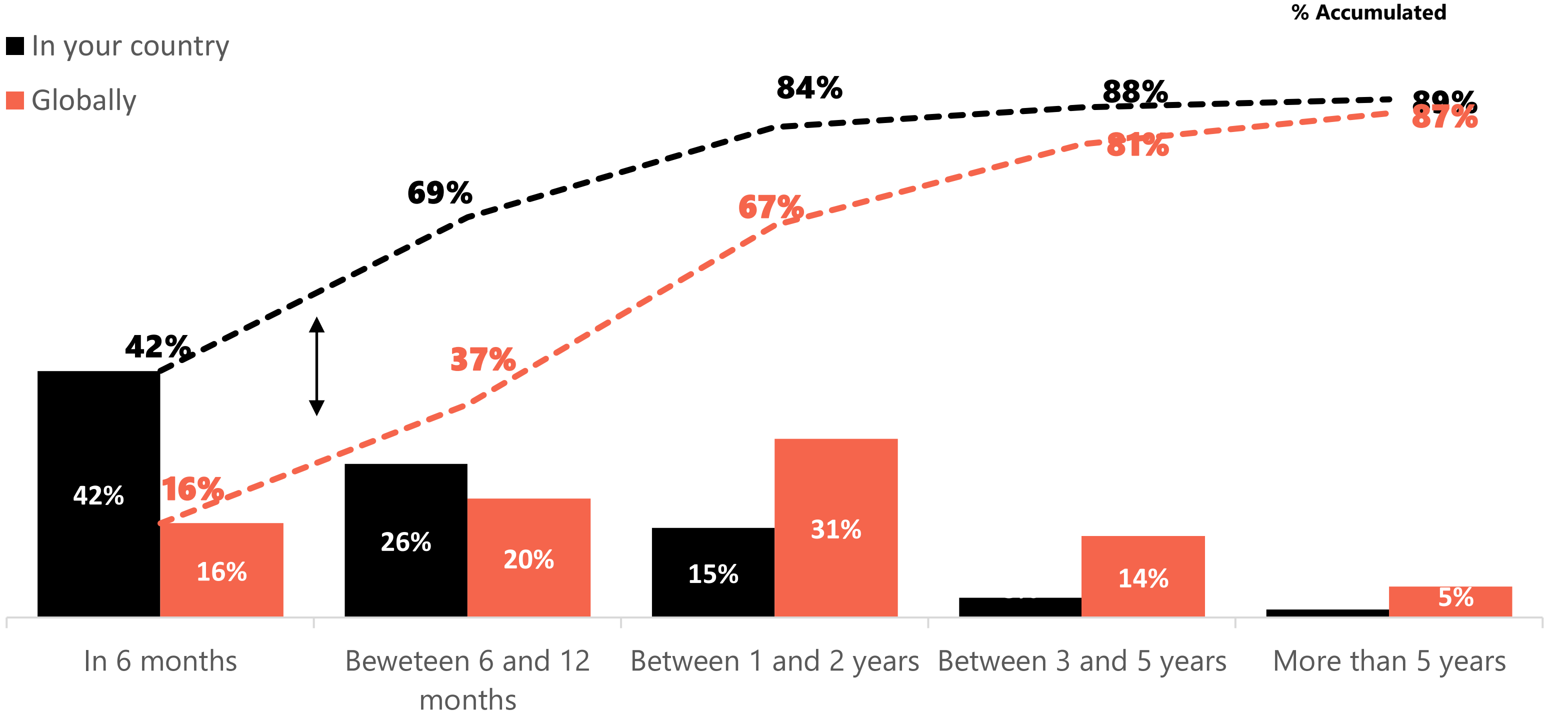


Source: Official data collated by Our World in Data – Last updated 22 September 2021, 21:40 (London time)
Note: Alternative definitions of a full vaccination, e.g. having been infected with SARS-CoV-2 and having 1 dose of a 2-dose protocol, are ignored to maximize comparability between countries.
OurWorldInData.org/coronavirus • CC BY

Differences perceived by the population

Only 37% anticipate global availability of the vaccine in less than a year. Nearly 70% think that we will have to wait at least 2 years for global availability, which increases the uncertainty about the pandemic evolution.

When do you think a vaccine will be available for the entire population?



Q20. When do you think a vaccine will be available for the entire population in your country?
Q21. When do you think a vaccine will be available for the entire world population?

% believe that the vaccine will be available IN LESS THAN 1 YEAR

	At MY COUNTRY	WORLDWIDE
Total	**69%**	**37%**
	77%	30%
	59%	36%
	68%	26%
	62%	33%
	72%	29%
	55%	32%
	82%	56%
	71%	39%
	76%	46%
	66%	39%

Cumulative % before one year

Fear of the economic crisis

Beyond the human losses due to COVID…

“Recession” keeps being the worst post-COVID consequence, more so in LATAM.

Growing concerns towards “Mental Health” issues

(16%)

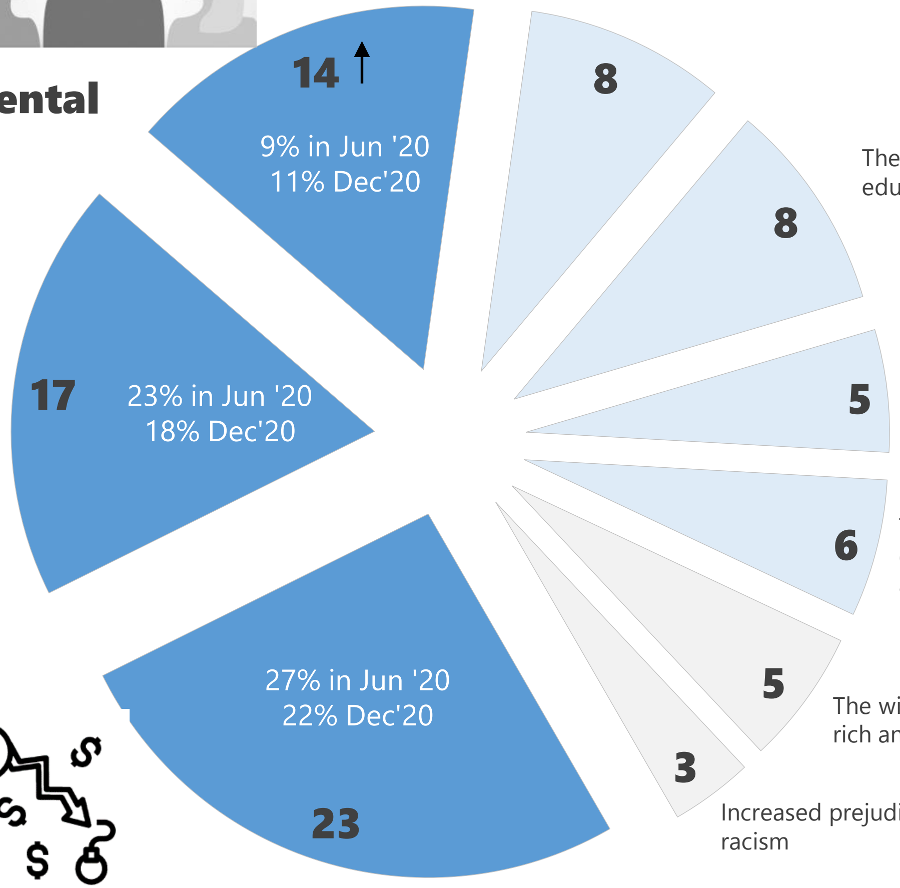
Impact on mental health

(28%) (23%)

Rising unemploymen t

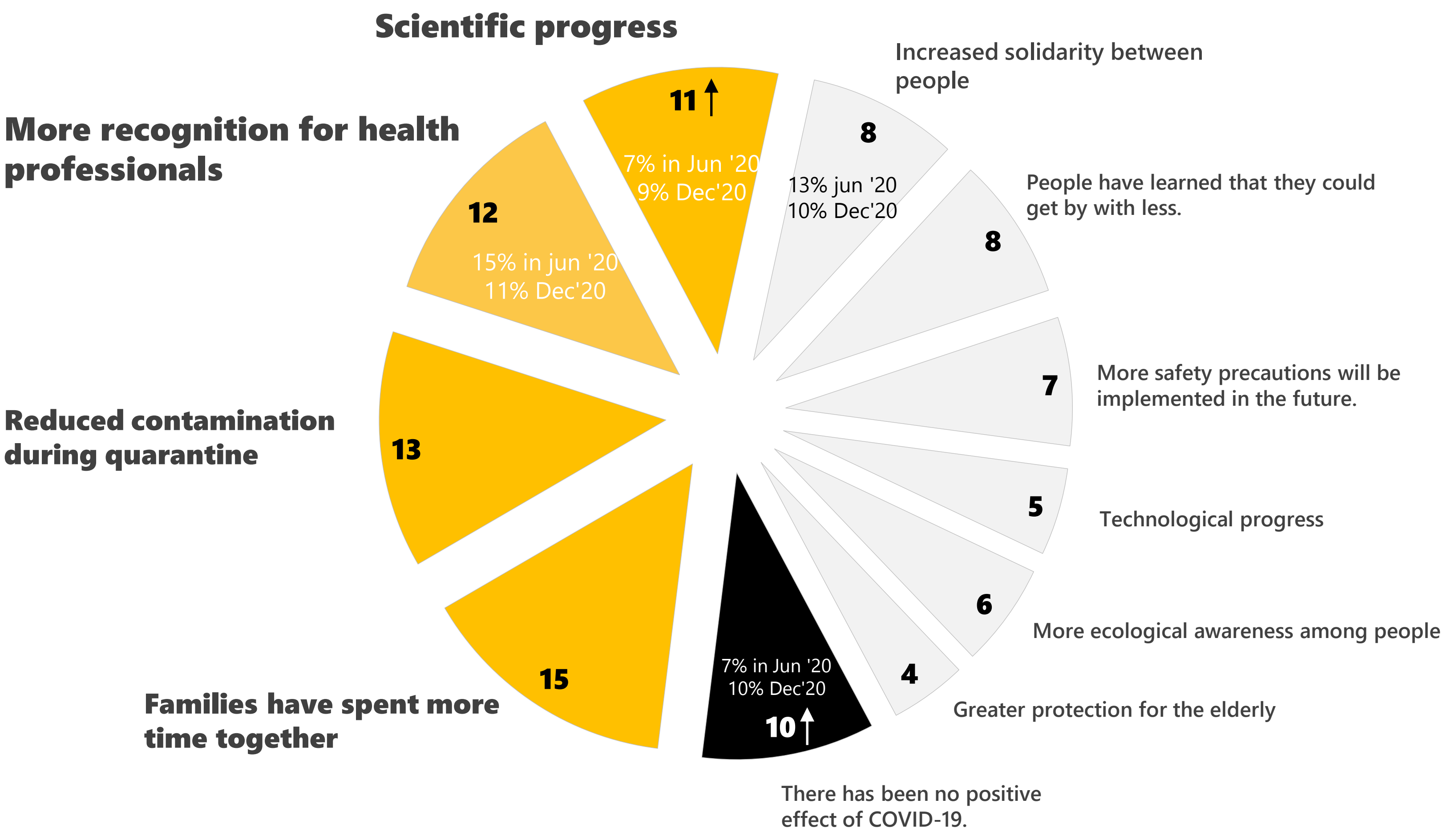
(50%) (33%) (28%)

Economic recession



P12. Besides the unfortunate death toll caused by COVID-19, what is the worst consequence of the pandemic?

The positive effects are more diffuse...



A slight increase in scientific progress as the most positive outcome of the pandemic. But the "recognition of medical staff" and above all the "perception of greater solidarity between people" gets diluted.

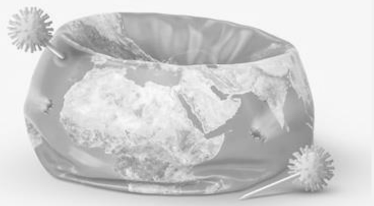
P17. Beyond all the negative consequences, what do you think has been the most positive effect of COVID-19? And secondly? (total base) (n=4,535)

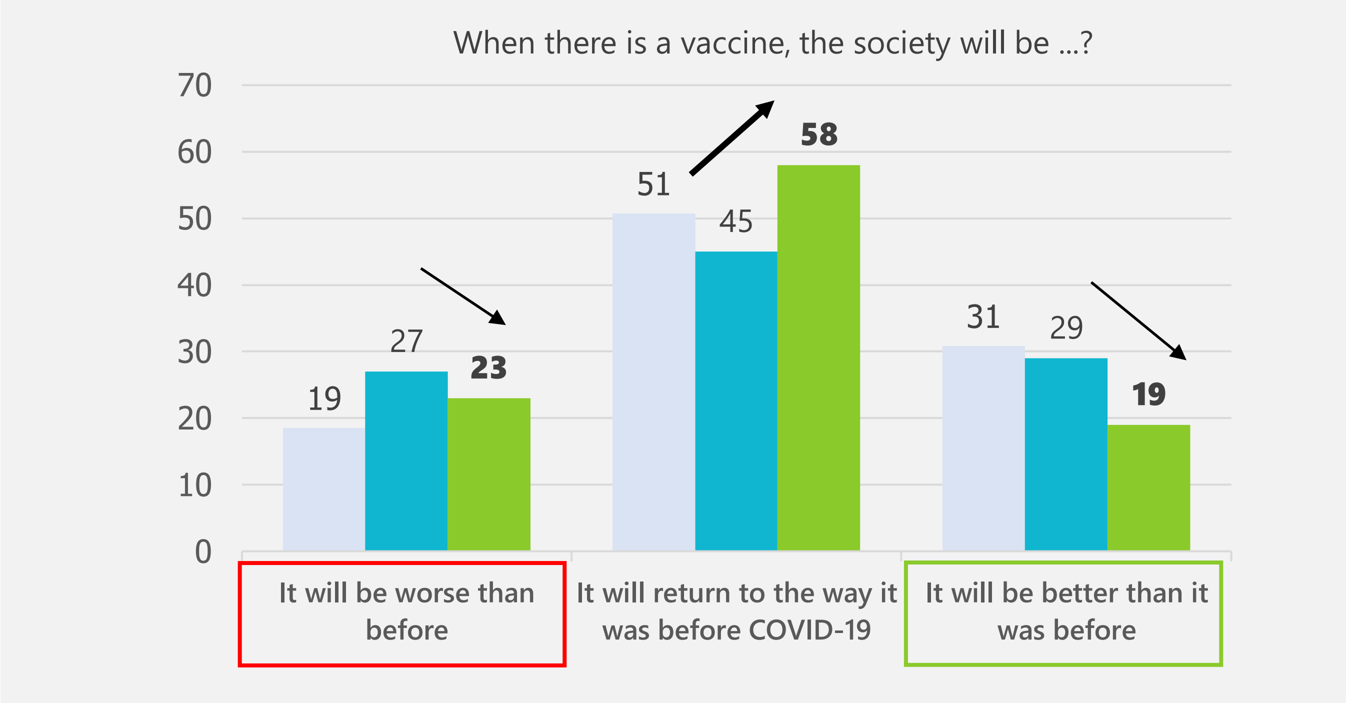
The epic factor is vanishing

Social disenchantment: we will not be a better a society

Feeling (Difference between better and worse)

June'2020	+12
December'2020	+2
July'2021	-4





Slightly more social optimism in America. More disappointment in Europe

BETTER	10%	8%	13%	9%	22%	17%	39%	28%	25%	24%
SAME	64%	62%	60%	61%	52%	57%	51%	48%	60%	57%
WORSE	26%	30%	27%	31%	26%	26%	11%	24%	25%	19%
	-16	-22	-14	-22	-4	-9	+28	+4	0	+5

Q16b. When a COVID-19 vaccine becomes available, do you think society in general will be...?

Normality is a desire but is not anticipated to be realized in the short term

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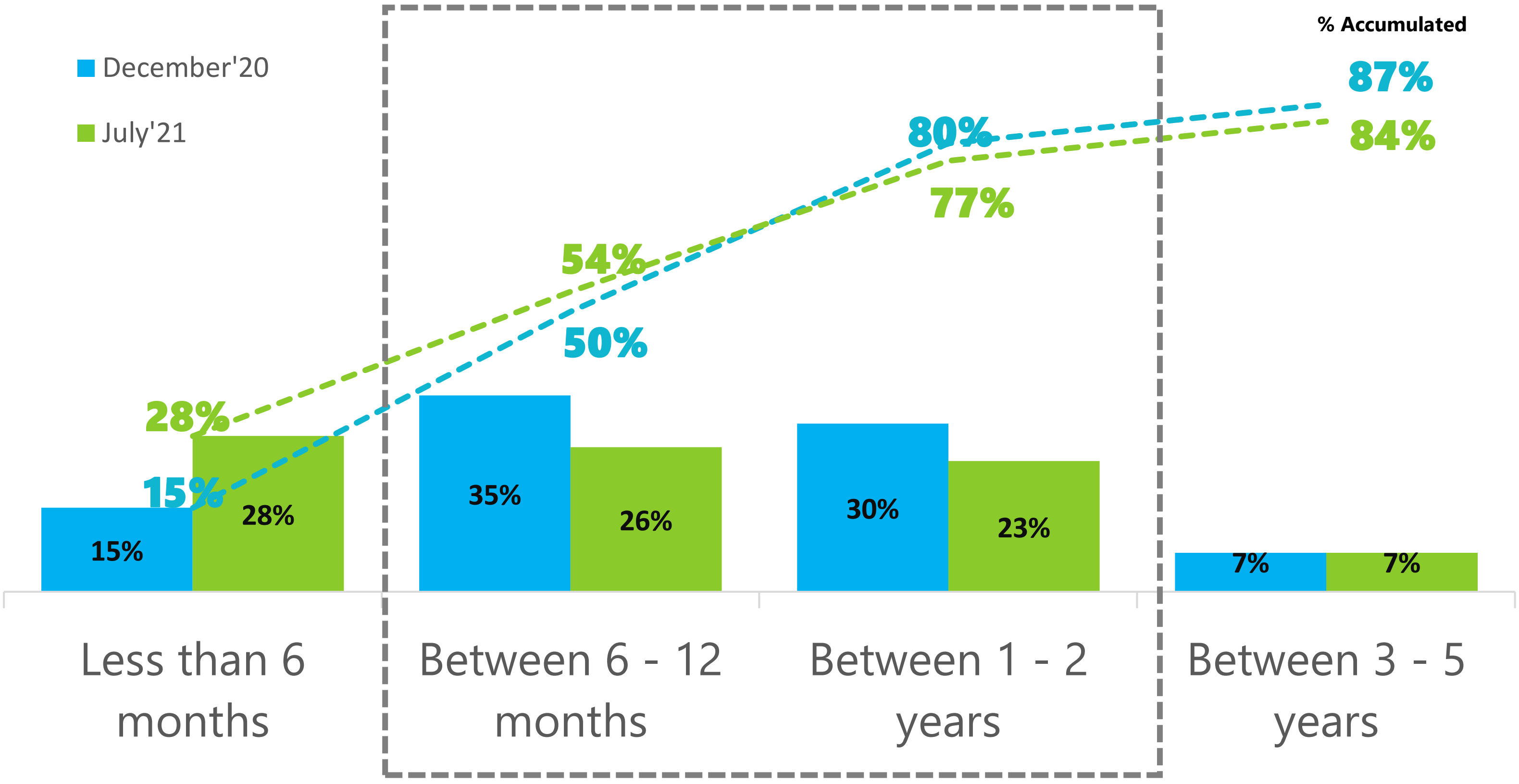
When do you expect to regain some normality?



	I'm back to normal in my life.	I will be back to normal within 6 months	I will be back to normal within 1 year
Total	**9%**	**28%**	**54%**
	5%	26%	54%
	10%	25%	44%
	7%	28%	47%
	10%	23%	51%
	8%	28%	52%
	8%	25%	49%
	6%	30%	**66%**
	4%	17%	46%
	4%	20%	56%
	27%	**55%**	**70%**

13% remaining, never or don't know

When do you expect to regain some normalcy in your life?

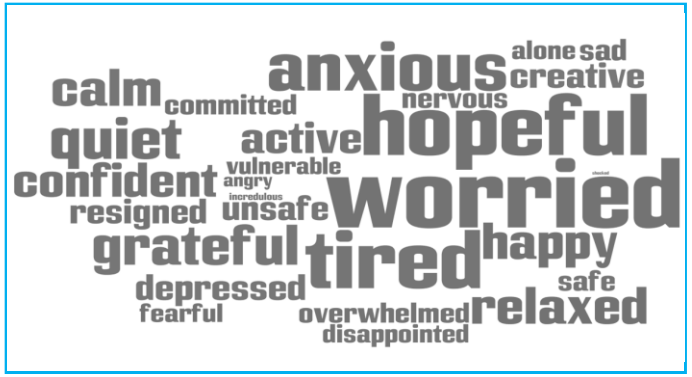
Which leads to mixed emotions

Sentiment ratio (negative and positive emotions)

	Negative	Positive
JUNE 2020	42%	58%
DECEMBER 2020	44%	56%
JULY 2021	39%	61%

JUNE 2020

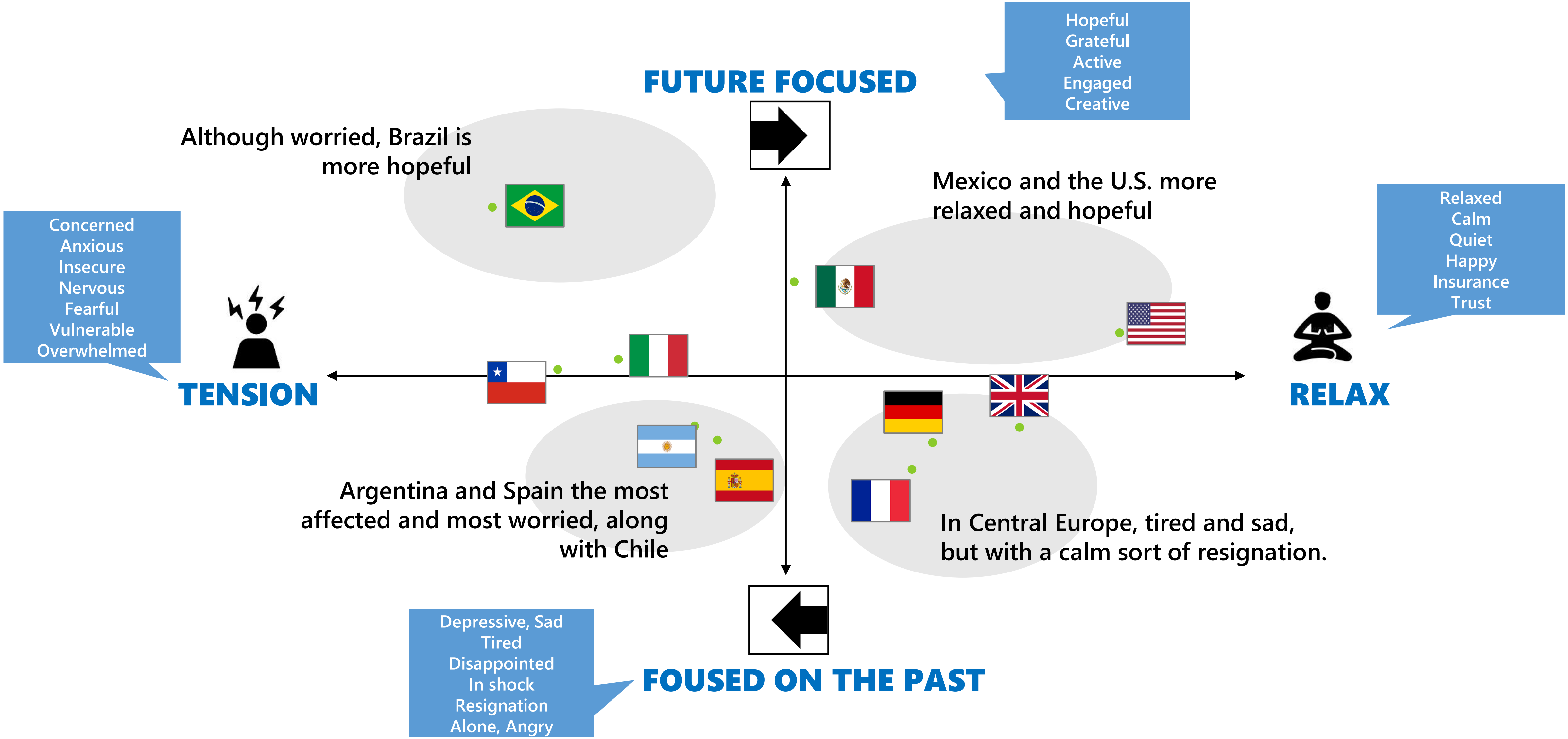
DECEMBER 2020



JULY 2021

P10. Select 3 words that describe your current mood.

Different countries, different experiences and emotions



The economy sets the mood

Argentina, Spain and Chile are the most pessimistic about their country's economy.

How will the economic situation in each country change?

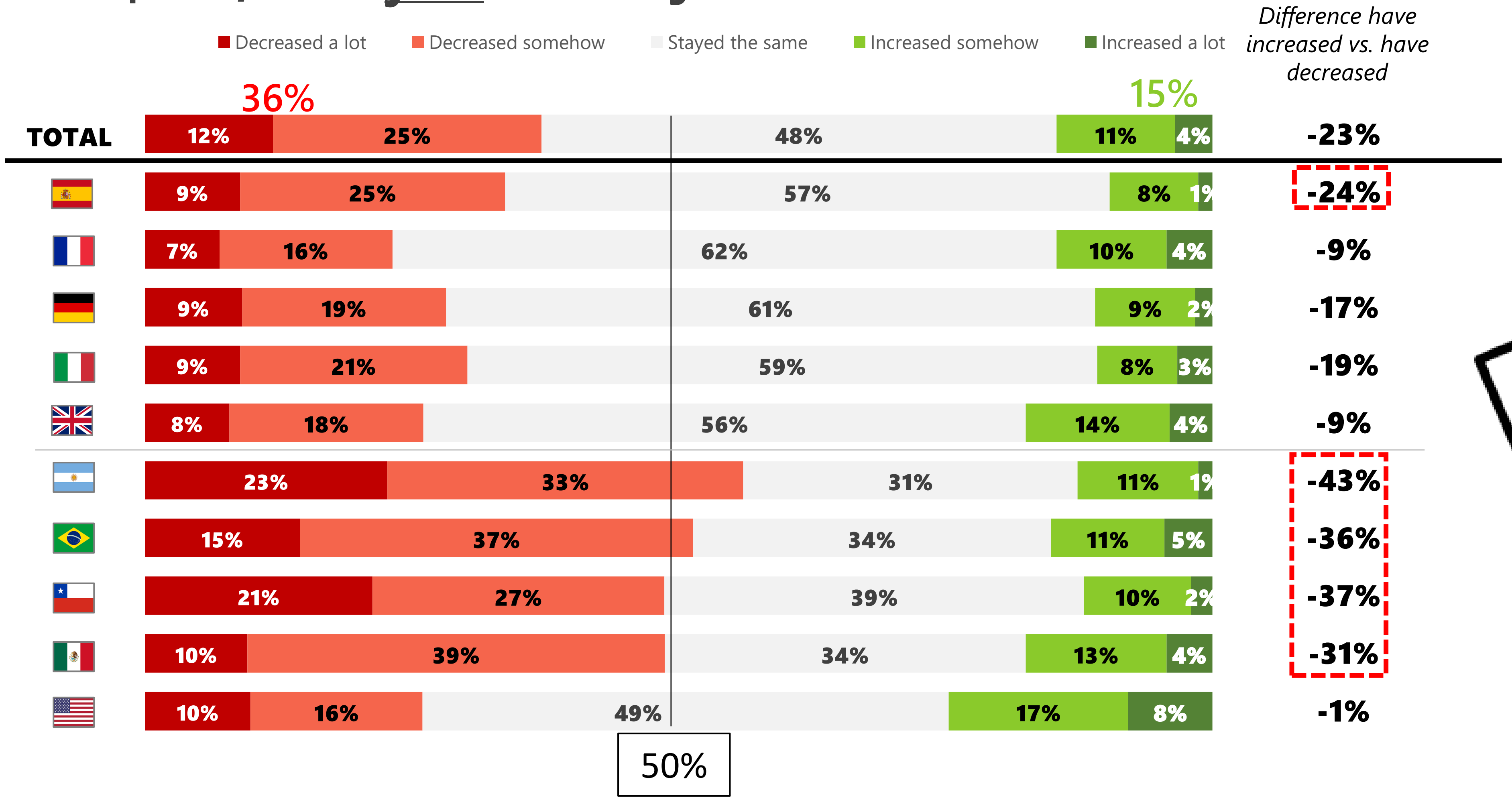
											
Better or much **better**	**37%**	29%	38%	36%	34%	**42%**	22%	**43%**	32%	**44%**	21%
It won't change at all	**18%**	14%	15%	23%	27%	20%	18%	13%	18%	19%	52%
Worse or much **worse**	**40%**	**55%**	38%	34%	34%	36%	**58%**	38%	42%	36%	27%
Index of change:	+3	-26	0	+2	0	+6	-36	+5	-10	+8	-6
Don't know	*5%*	*3%*	*9%*	*7%*	*6%*	*4%*	*2%*	*6%*	*8%*	*10%*	*7%*

Q14. Regarding the ECONOMIC SITUATION, what do you expect for the next months? Regarding the economic situation in your country

The COVID GAP due to economics

A general reduction in income

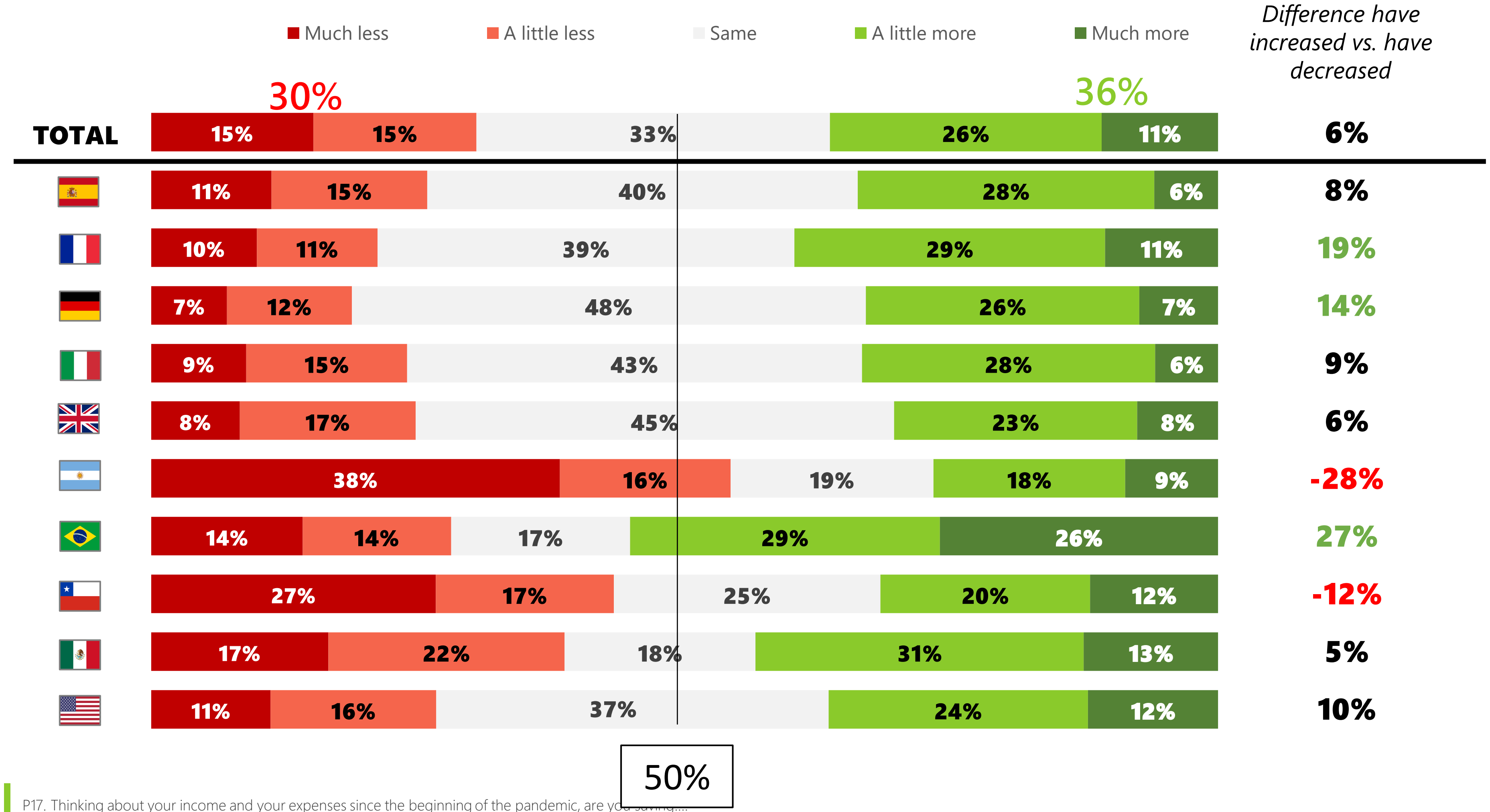
As a result of the pandemic, **how has <u>your</u> income changed?**



P16. How has your income changed as a result of the pandemic?

But an unequal effect on savings

Thinking about your income and expenses since the start of the pandemic, are you saving…



P17. Thinking about your income and your expenses since the beginning of the pandemic, are you saving….

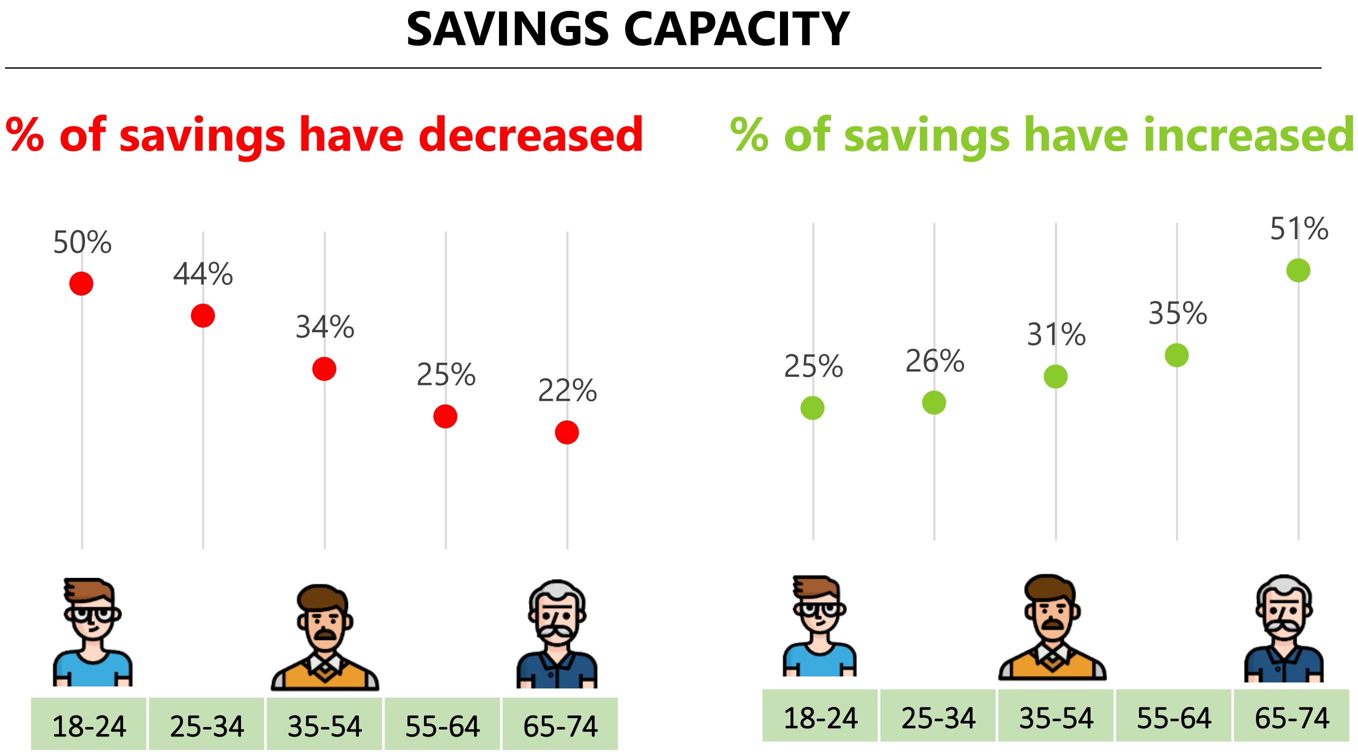
The youngest get hit the hardest

Among young people

50% have lost savings
Only 25% have increased them

Among the oldest

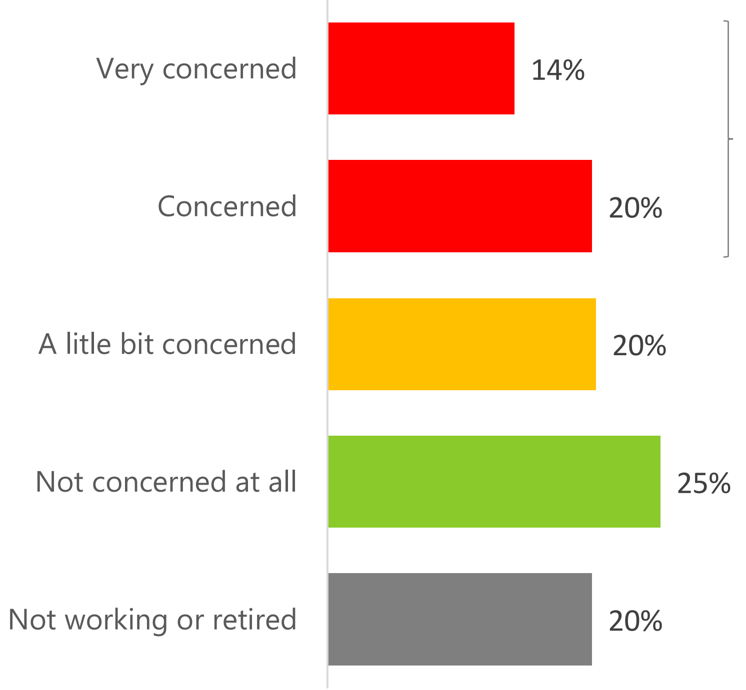
It's the other way around: 22% have reduced their savings, but +50% have increased them.



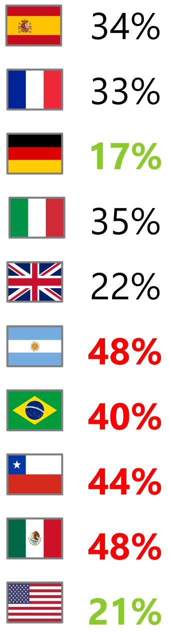
P17. Thinking about your income and your expenses since the beginning of the pandemic, are you saving....

Over 40% of young people are concerned about their employment

Concern about losing the job

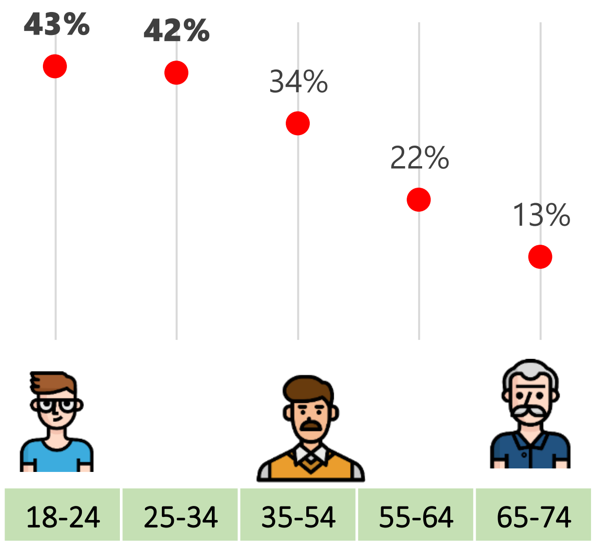


34%



% Strongly + very concerned

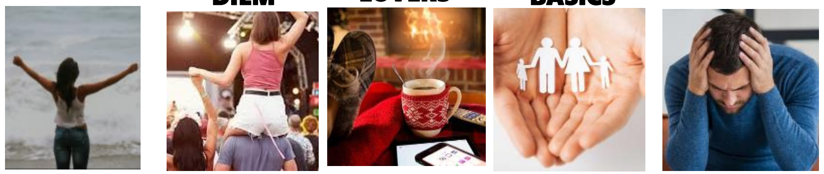
Breakdown by age:



Q15. Are you worried about losing your job in the next few months?

Accepting the New Normal as new Reality

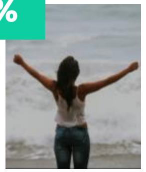
5 vital post COVID attitudes emerge



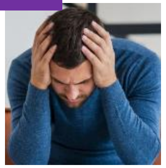
	EMPOWERED	CARPE DIEM	HOME LOVERS	BACK TO BASICS	DISTRESSED
🇪🇸	16%	19%	19%	16%	32%
🇫🇷	16%	25%	13%	13%	33%
🇩🇪	21%	25%	23%	8%	23%
🇮🇹	17%	19%	15%	14%	34%
🇬🇧	23%	15%	21%	10%	32%
🇦🇷	21%	23%	18%	24%	14%
🇧🇷	32%	7%	22%	22%	17%
🇨🇱	16%	22%	22%	24%	16%
🇲🇽	24%	11%	16%	33%	16%
🇺🇸	22%	19%	24%	14%	21%

The economic outlook sets the tone

How will your personal financial situation change?

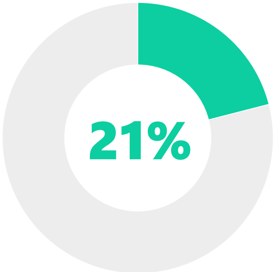


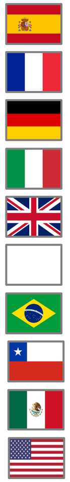




		21% EMPOWERED	18% CARPE DIEM	19% HOME LOVERS	18% BACK TO BASICS	24% DISTRESSED
Better or much **better**	32%	**43%**	35%	32%	33%	21%
It won't change at all	40%	38%	**45%**	40%	39%	36%
Worse or much **worse**	22%	15%	16%	24%	24%	**33%**
Index of change:	**+10**	**+28**	**+19**	**+12**	**+9**	**-12**
Don't know	*6%*	*4%*	*4%*	*4%*	*4%*	*10%*

Q14. In terms of the ECONOMIC SITUATION, what do you expect for the next few months? Regarding your particular economic situation





	16%
	16%
	21%
	17%
	23%
	21%
	32%
	16%
	24%
	22%

The EMPOWERED are cautious about the virus but their expectations are positive.
It is the group that **has the most confidence in a better society after the virus.**

Their direct economic impact has been low and the pandemic has helped them to feel more active. They give more relevance to purchasing online but also to aspects of sustainability or brand responsibility.

DEMOGRAPHIC PROFILE

Gender

47	53

Age

18 - 34	39
35 - 54	42
55 or +	19

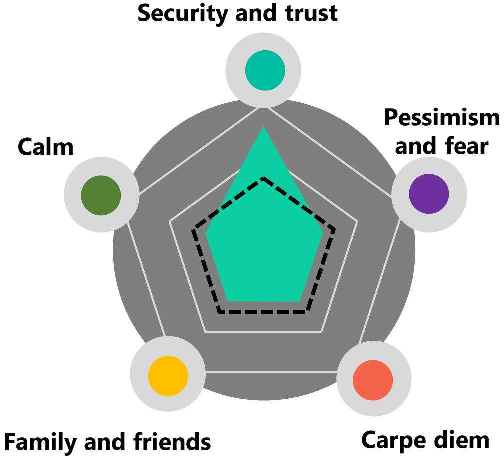
COVID IMPACT

	GROUP	BENCHMARK
% "Very worried" for exposure to COVID	29%	27%

FINANCE

Income variance with COVID	-13	-23
Savings variance with COVID	+13	+6

LIFE ATTITUDES



"I believe in the power of society"

"I've adopted a healthier lifestyle habit."

I feel...

HOPEFUL (36%)
GRATEFUL (22%)
RELAXED (19%)
ACTIVE (18%)

PERSPECTIVES

	GROUP	BENCHMARK
SOCIETY		
Society WILL BE BETTER than before	28%	19%
PERSONALS		
I'll be back to normal in <1year	63%	54%
My economic outlook (% will get better-% will get worse)	+28	+10

CHANGE in PURCHASE DRIVERS

More important now*...	GROUP	BENCHMARK
DELIVERY	+46	+42
ONLINE (WEB/APP)	+45	+41
PRICE	+44	+39
QUALITY	+40	+35
ECO OR SUSTAINABLE	+45	+34
RSC	+37	+31
TRUSTED	+33	+28
LOCAL BRAND	+33	+27
KNOWN BRAND	+15	+9

Most important - least important difference

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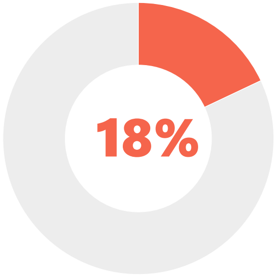


	19%
	25%
	25%
	19%
	15%
	23%
	7%
	22%
	11%
	19%

The philosophy of this group is clear: "Live the moment".

The CARPE DIEM are certainly **the least concerned about COVID-19 and are** hopeful that they will be back to normal soon.

They have an **optimistic future economic outlook** driven by a higher level of post-pandemic savings.

DEMOGRAPHIC PROFILE

Gender

51	49

Age

18 - 34	40
35 - 54	43
55 or +	18

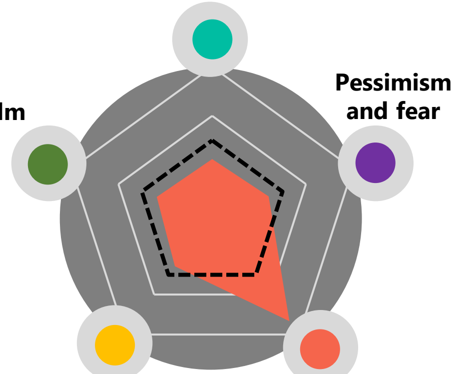
COVID IMPACT

	GROUP	BENCHMARK
% "Very worried" for exposure to COVID	17%	27%

FINANCE

Income variance with COVID	-14	-23
Savings variance with COVID	+12	+6

LIFE ATTITUDES



"Live it to the fullest, without thinking too much about tomorrow."

"Looking forward to doing new things as soon as I can."

I feel...

HOPEFUL (28%)
RELAXED (19%)
ANXIOUS (18%)
HAPPY (14%)

PERSPECTIVES

	GROUP	BENCHMARK
SOCIETY		
Society will be better than before	15%	19%
PERSONALS		
I'll be back to normal in <1year	60%	54%
My economic outlook (% will get better-% will get worse)	+19	+10

CHANGE in PURCHASE DRIVERS

More important now *...	GROUP	BENCHMARK
DELIVERY	+41	+42
ONLINE (WEB/APP)	+39	+41
PRICE	+36	+39
QUALITY	+32	+35
ECO OR SUSTAINABLE	+33	+34
RSC	+29	+31
TRUSTED	+25	+28
LOCAL BRAND	+23	+27
KNOWN BRAND	+9	+9

Most important - least important difference

HOME LOVERS

19%

🇪🇸	19%
🇫🇷	13%
🇩🇪	23%
🇮🇹	15%
🇬🇧	21%
🇦🇷	18%
🇧🇷	22%
🇨🇱	22%
🇲🇽	16%
🇺🇸	24%

Confinement and concern for health have fostered a lifestyle where individuality and tranquility prevail.

Older HOME LOVERS are looking to get away from their frenetic lifestyle **and opt for plans at home. Home delivery**, therefore, becomes a differential factor in the purchase, to the detriment of the brand itself.

DEMOGRAPHIC PROFILE

Gender

47	53

Age

18 - 34	34
35 - 54	49
55 or +	17

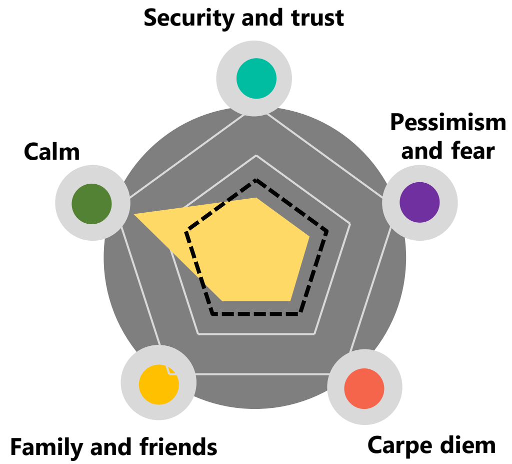
COVID IMPACT

	GROUP	BENCHMARK
% "Very worried" for exposure to COVID	30%	27%

FINANCE

Income variance with COVID	-21	-23
Savings variance with COVID	+16	+6

LIFE ATTITUDES



"I've become more homely."

"I want to move to a quieter area."

I feel...

WORRIED (22%)
CALMED (17%)
HAPPY (13%)

PERSPECTIVES

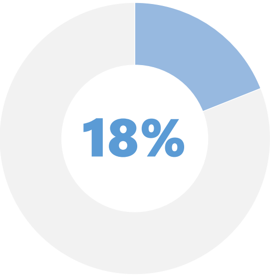
	GROUP	BENCHMARK
SOCIETY		
Society WILL BE BETTER than before	16%	19%
PERSONALS		
I'll be back to normal in <1year	51%	54%
My economic outlook (% will get better-% will get worse)	+10	+10

CHANGE in PURCHASE DRIVERS

More important now *...	GROUP	BENCHMARK
DELIVERY	+45	+42
ONLINE (WEB/APP)	+43	+41
PRICE	+38	+39
QUALITY	+37	+35
ECO OR SUSTAINABLE	+29	+34
RSC	+30	+31
TRUSTED	+25	+28
LOCAL BRAND	+25	+27
KNOWN BRAND	+4	+9

Most important - least important difference

BACK TO BASICS



16%
13%
8%
14%
10%
24%
22%
24%
33%
14%

With considerable negative economic and personal impact, the pandemic has helped them to value **"the basics" and what is really important to them.**

Hence, they seek to spend more time as a family.

In addition, the most important aspect at the time of purchase is again the **quality and price** of the product, although **they also look for eco or sustainable aspects.**

DEMOGRAPHIC PROFILE

Gender

44	57

Age

18 - 34	27
35 - 54	47
55 or +	26

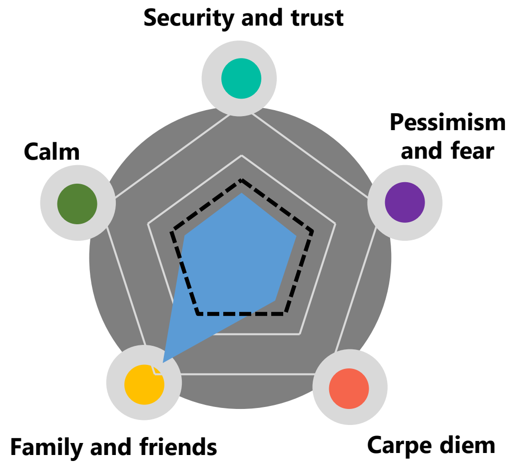
COVID IMPACT

	GROUP	BENCHMARK
% "Very worried" for exposure to COVID	27%	27%

FINANCE

Income variance with COVID	-35	-23
Savings variance with COVID	-8	+6

LIFE ATTITUDES



"I want to spend more time with my family and friends."

"I want to spend more time with my children."

I feel...

HOPEFUL (30%)
WORRIED (25%)
GRATEFUL (21%)

PERSPECTIVES

	GROUP	BENCHMARK
SOCIETY		
Society WILL BE BETTER than before	22%	19%
PERSONALS		
I'll be back to normal in <1year	52%	54%
My economic outlook (% will get better-% will get worse)	+9	+10

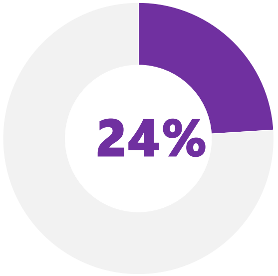
CHANGE in PURCHASE DRIVERS

More important now *...	GROUP	BENCHMARK
DELIVERY	+44	+42
ONLINE (WEB/APP)	+43	+41
PRICE	+46	+39
QUALITY	+41	+35
ECO OR SUSTAINABLE	+39	+34
RSC	+37	+31
TRUSTED	+32	+28
LOCAL BRAND	+27	+27
KNOWN BRAND	+6	+9

Most important - least important difference

DISTRESSED

Punto de Fuga
The Value of People Insight



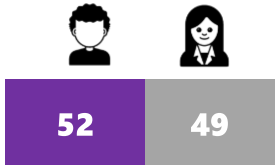
32%
33%
23%
34%
32%
14%
17%
16%
16%
21%

The DISTRESSED group is the **youngest of the five and also the most pessimistic**.

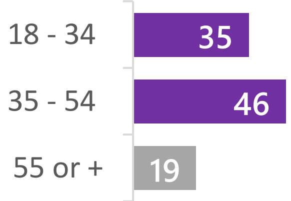
With a decrease in income and savings, a sense of concern becomes common to all of them. This is reflected in purchasing where **the importance of quality and also sustainability vs. other groups is lowered.**

DEMOGRAPHIC PROFILE

Gender



Age



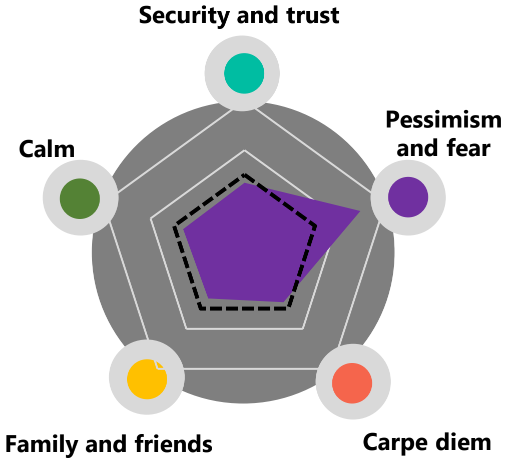
COVID IMPACT

	GROUP	BENCHMARK
% "Very worried" for exposure to COVID	30%	27%

FINANCE

Income variance with COVID	-30	-23
Savings variance with COVID	-3	+6

LIFE ATTITUDES



"I am now more pessimistic about the future."

"The pandemic has affected me negatively on an emotional level."

I feel...

TIRED (30%)
WORRIED (28%)
ANXIOUS (23%)
DEPRESSED (15%)

PERSPECTIVES

	GROUP	BENCHMARK
SOCIETY		
Society WILL BE BETTER than before	13%	19%
PERSONALS		
I'll be back to normal in <1year	43%	54%
My economic outlook (% will get better-% will get worse)	-12	+10

CHANGE in PURCHASE DRIVERS

More important now *...

	GROUP	BENCHMARK
DELIVERY	+36	+42
ONLINE (WEB/APP)	+36	+41
PRICE	+34	+39
QUALITY	+28	+35
ECO OR SUSTAINABLE	+27	+34
RSC	+26	+31
TRUSTED	+26	+28
LOCAL BRAND	+26	+27
KNOWN BRAND	+11	+9

One thing is for sure: there is a real “before and an after”

86%

A change that’s here to stay

June 2020: 79%.
December 2020: 83%.
July 2021: 86%.

Perception of a revolving effect is more intense in LATAM

Generalized perception of a turning point, though with different intensity levels

How will COVID-19 change lives in every country?

	Total	Spain	France	Germany	Italy	UK	Argentina	Brazil	Chile	Mexico	USA
It won't change at all	**14%**	11%	**23%**	**19%**	11%	15%	16%	6%	10%	2%	**21%**
It will change something	**48%**	53%	54%	53%	62%	58%	38%	40%	40%	33%	52%
It will change everything	38%	37%	24%	29%	27%	27%	**45%**	**54%**	**48%**	**65%**	27%
% CHANGE	**86%**	**90%**	**78%**	**82%**	**89%**	**85%**	**83%**	**94%**	**88%**	**98%**	**79%**

Q11. To what extent do you think COVID-19 will change our lives?

The change of habits consolidates (same trend as in Dec'20)

Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

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

What activities are less expected in the short term?

Activities where a soon return to normalcy is anticipated

Activity	July '21	DECEMBER 20
Buying clothes and accessories	-5%	-7%
Lunch or dinner out	-8%	-12%
Going to the gym	-9%	-5%

Activities that are still less present in the new reality

Activity	July '21	DECEMBER 20
Air travel	-19%	-15%
Travelling abroad	-20%	-14%
Going to bars / restaurants	-20%	-16%
Go to the shopping centre	-23%	-21%
Going to the cinema/theatre	-24%	-15%
Go to festivals/concerts	-24%	-17%
Use public transport	-26%	-23%

What activities are going to be practiced the most?

Activities that gained strength in the new reality

DECEMBER 20	Activity	July '21
32%	Spending time with the family	36%
29%	Recycling and reusing things	32%
28%	Following a healthy and balanced diet	32%
23%	Homeoffice	31%
26%	Buying products online	31%
22%	Buying food products online	29%
22%	Home delivery of products or food	27%
21%	Buying organic products	27%
18%	Learning online / Participating in online courses	22%
19%	Shopping in shops close to home, in the...	21%
19%	Using my own vehicle, bicycle, etc.	20%
17%	Walking	13%
15%	Doing sports	10%
0%	Traveling within the country	0%
3%	Spending time with friends	0%

Q6. Compared to the 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?

Cocooning Effect: The New Role of the Home

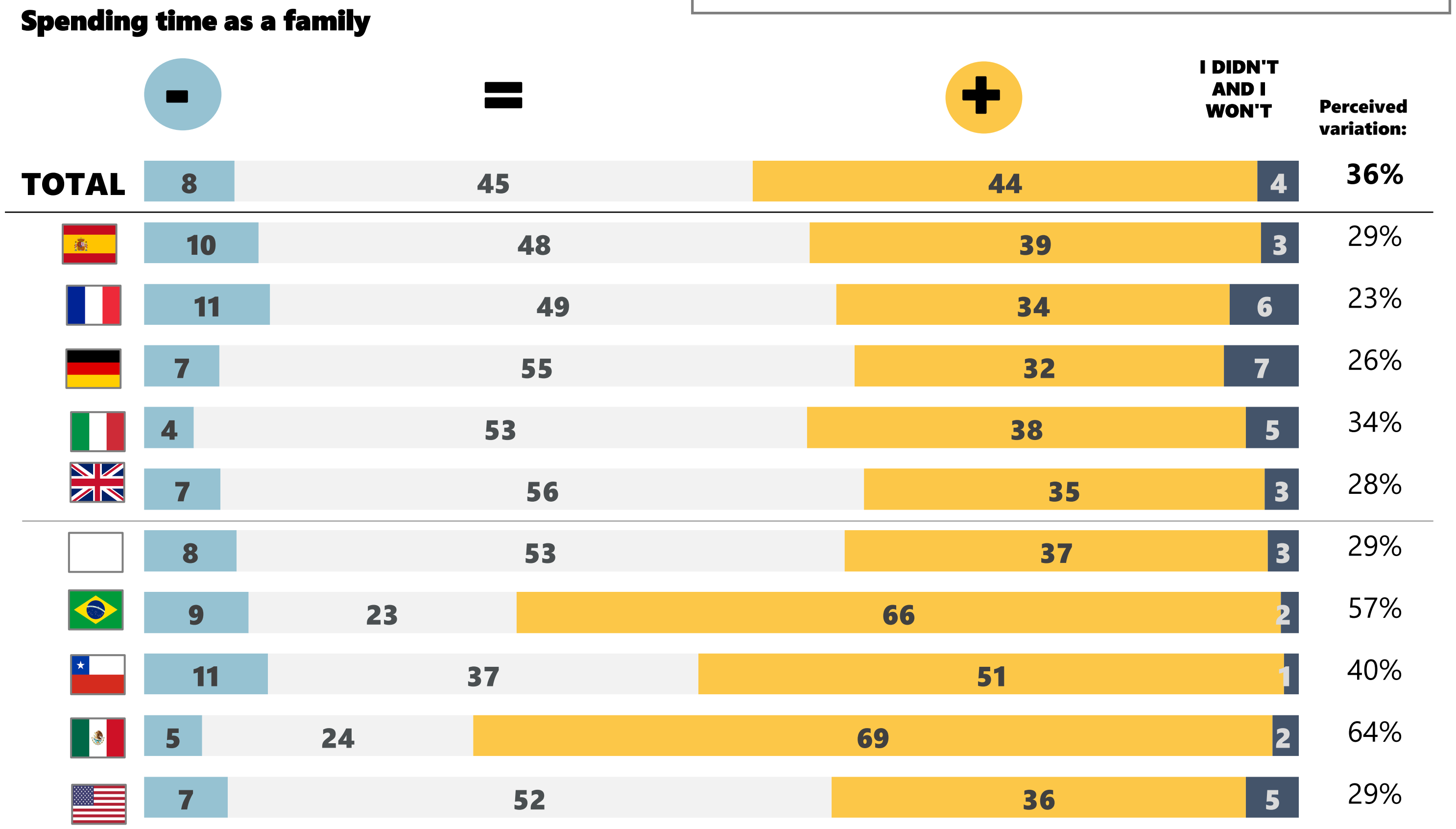
Relation-
ships

‘My Family’ as a top priority

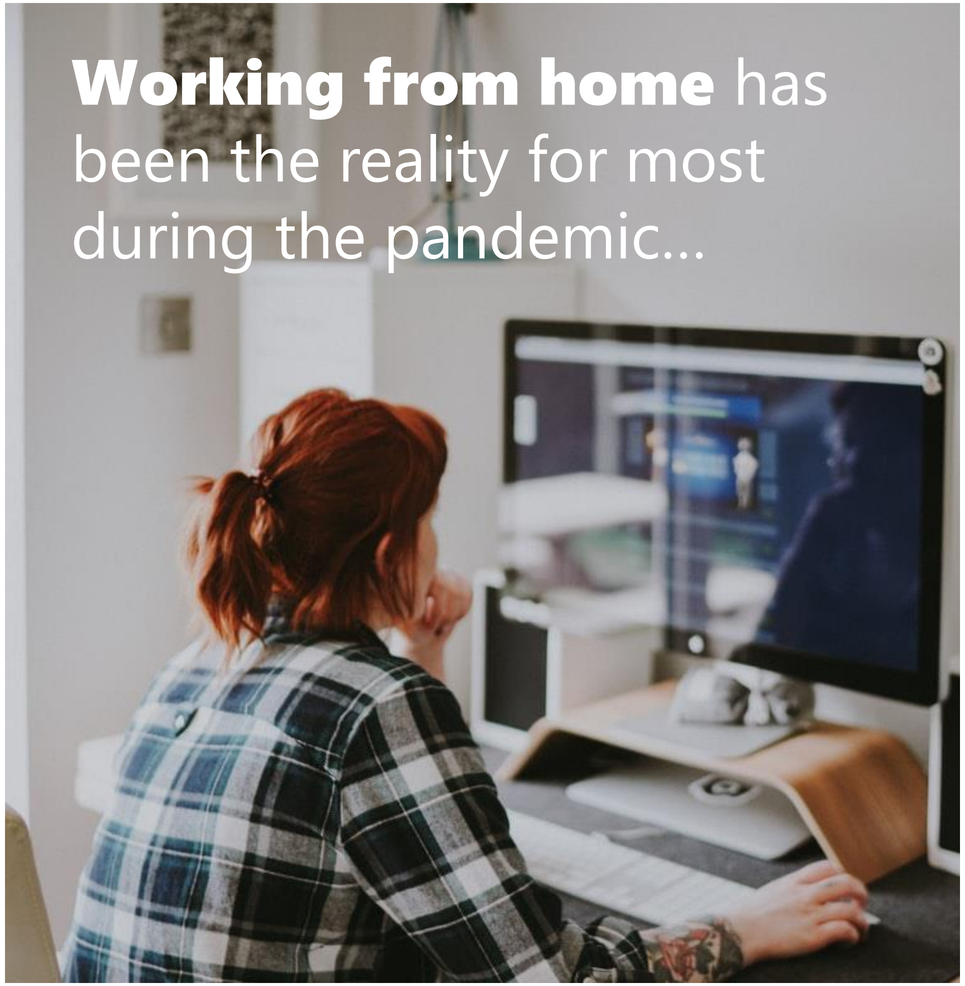
After the pandemic we have reevaluated family time

Perceived variation:

June 2020	December 2020	July 2021
+35%	+32%	+36%



Home has become also a workplace



... and it's here to stay:

Perceived variation:

June 2020	December 2020	July 2021
+13%	+23%	+31%

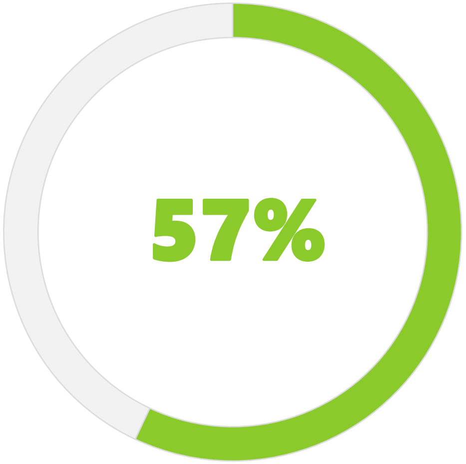
Working from home

	-	=	+	I DIDN'T AND WON'T	Perceived variation:
TOTAL	9	28	39	24	31%
	8	30	41	21	33%
	8	31	27	34	19%
	9	30	31	30	22%
	8	32	31	29	23%
	5	28	36	31	31%
	8	33	37	22	29%
	9	23	62	7	52%
	11	23	41	26	30%
	8	27	57	8	49%
	10	29	32	29	22%

But still needs to be readjusted

Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

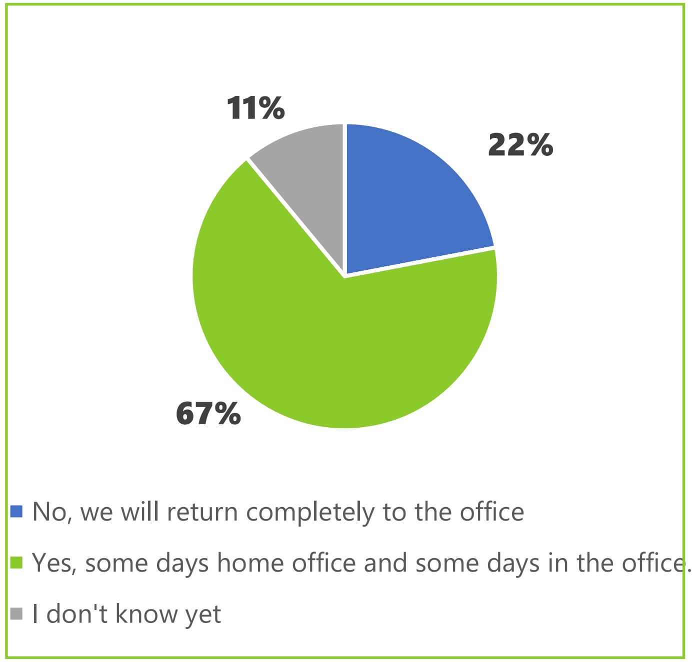
Home office workers are already planning their return to the office…



… with September as a deadline

Returning soon / next weeks	45%
In less than 3 months (no later than September)	33%
4-6 months from now (no later than December)	12%

… and with a hybrid format



Although some don't…

Not known yet, it depends on the evolution of COVID-19.	32%
It is unlikely that we will return to the office.	11%

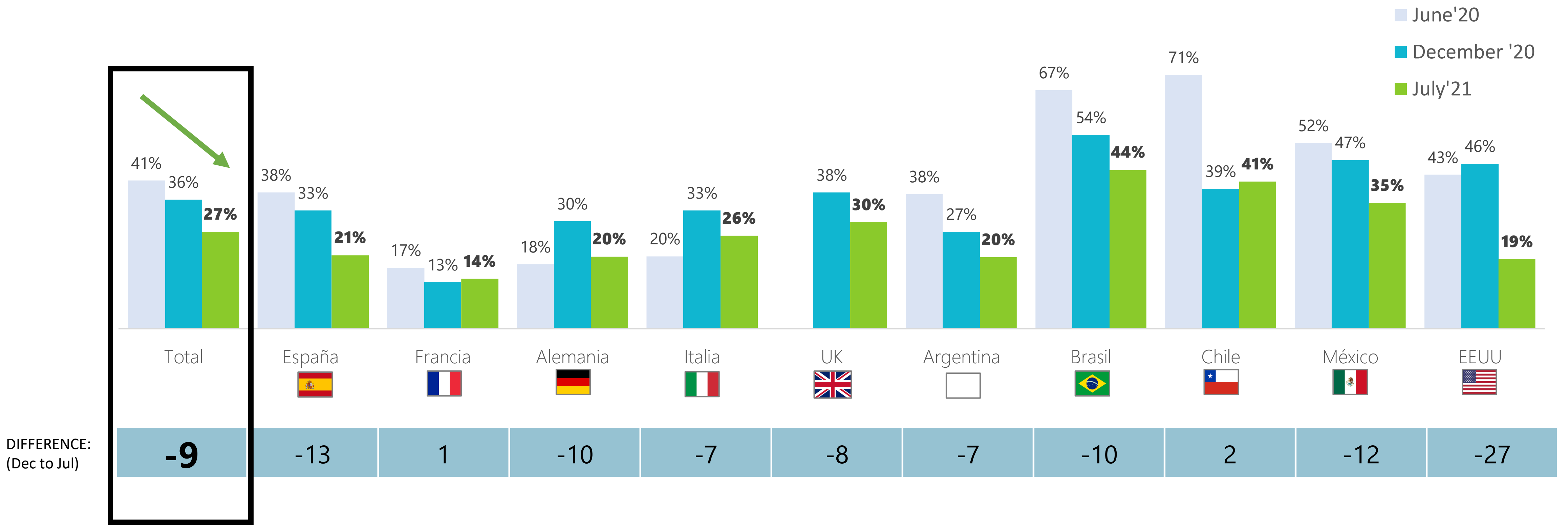
Q8. When do you plan to return to the office / Q9. Will you keep some home office days?

The shopping environment is not fully secure yet

Shopping

Concerns at the time of shopping are reduced but do not disappear completely yet, being still stronger in LATAM.

CURRENT concern about Coronavirus exposure when shopping (% very concerned)



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

Which explains the rise of new channels

Shopping

New channels are consolidated and become a new habit in all countries analysed.

Buy products online

Perceived variation:

June 2020	December 2020	July 2021
+12%	**+26%**	**+31%**

Buy food online

Perceived variation:

June 2020	December 2020	July 2021
+3%	**+22%**	**+29%**

Have products/food delivered to my home (delivery)

Perceived variation:

June 2020	December 2020	July 2021
+0%	**+22%**	**+27%**

Shopping in shops close to home, in the neighborhood

Perceived variation:

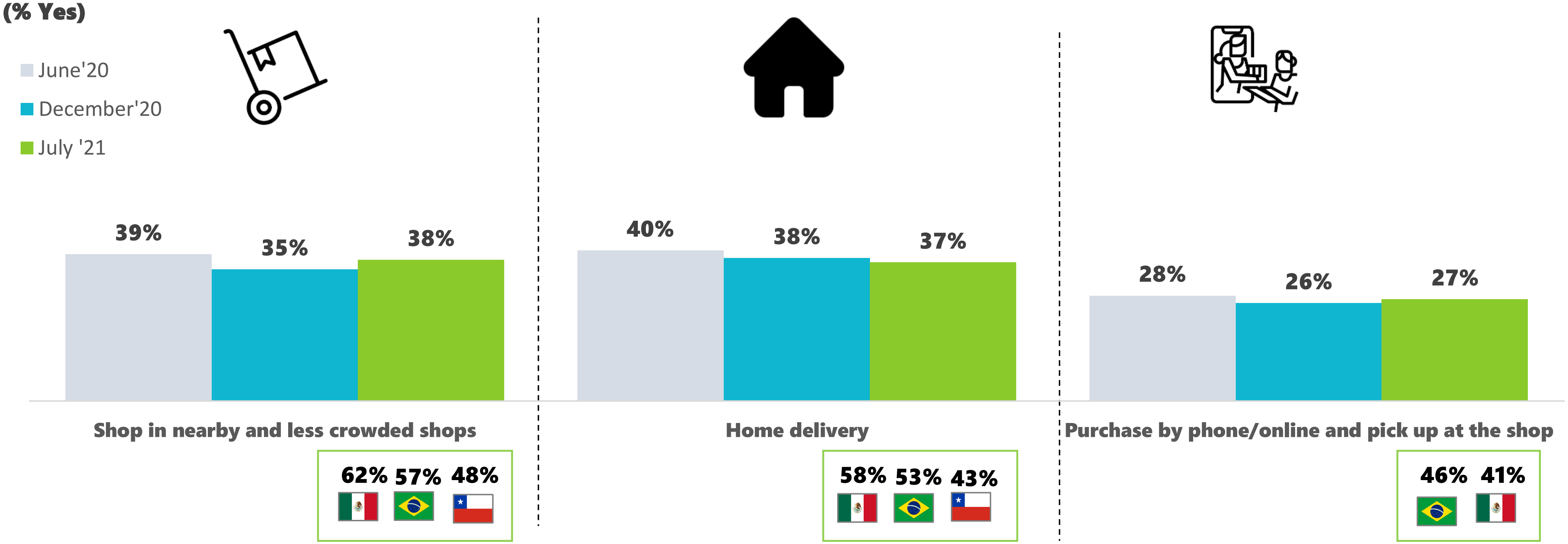
June 2020	December 2020	July 2021
+5%	**+19%**	**+21%**

A channel shift with added value

Shopping

Among those who opt for a channel shift: 1 in 3 is **willing to pay more for it**

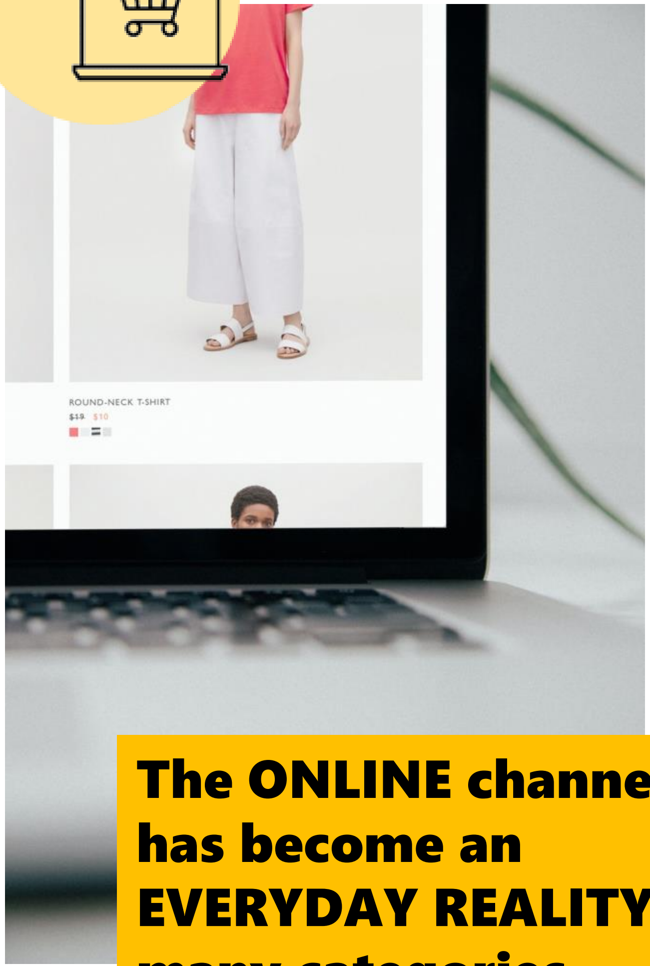
Willingness to pay more in grocery stores if they…



Q2. Are you willing to pay more for your food products if…?

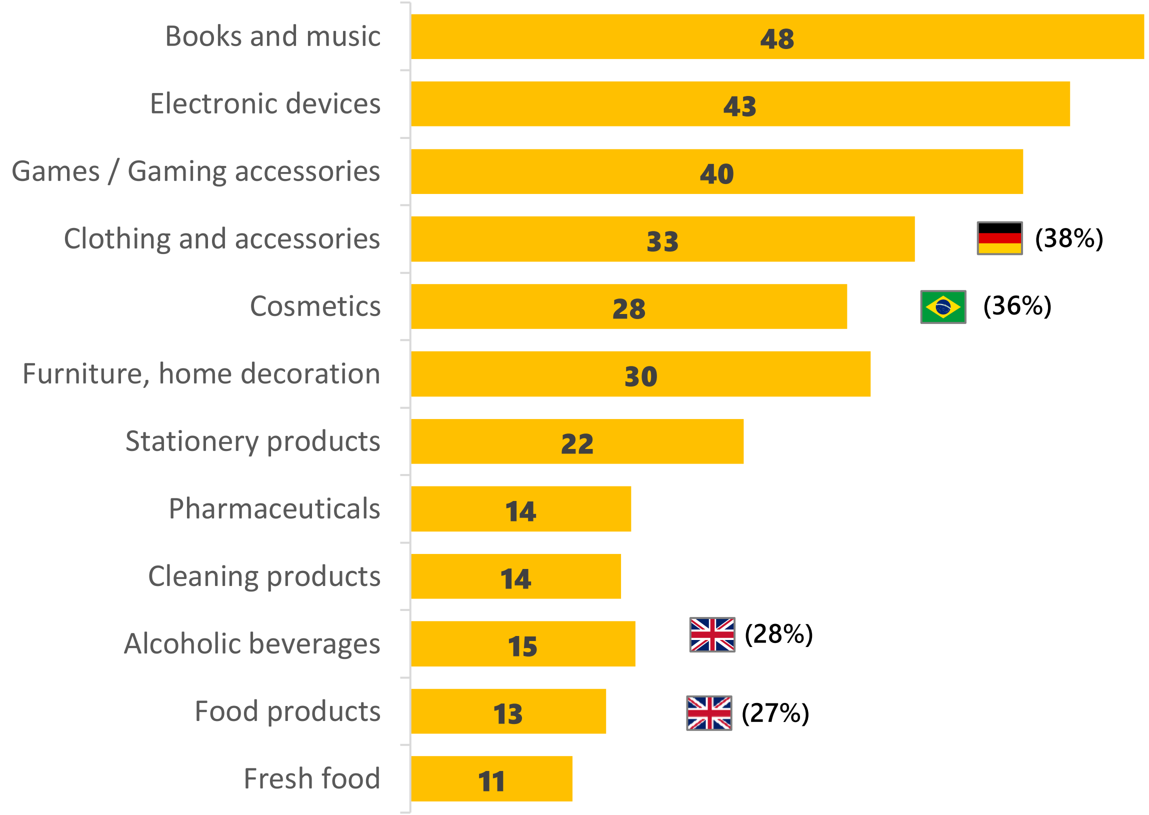
A new shopping reality that extends to many categories

Shopping



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

Mainly buy online



(base: buy the products)
Data Dec 2020

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

And that achieves high satisfaction rates

Shopping

Purchase channel / Satisfaction by channel (Scale from 1 to 10)

	Mostly in a shop	Both	Mostly online	Shop	Online
Books and music	27	25	48	7,48	**8,30**
Electronic devices	29	28	43	7,53	**8,27**
Games / Gaming accessories	30	30	40	7,36	**8,10**
Clothing and accessories	36	31	33	7,67	**7,91**
Cosmetics	46	25	28	7,67	**7,94**
Furniture, home decoration	43	27	30	7,60	**7,93**
Stationary products	57	22	22	7,76	7,83
Pharmaceuticals	66	19	14	8,05	8,10
Cleaning products	66	20	14	8,17	8,19
Alcoholic beverages	67	19	15	7,94	8,10
Food products	65	22	13	8,22	8,17
Fresh food	73	16	11	**8,26**	7,88

(base: buy the products)
Data Dec 2020

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?

Health

Paying greater attention to caring for our health and for the planet

With the exception of doing sports (which is more common in Europe), these are transversal attitudes in all the countries analyzed.

Buy organic products

Perceived variation:

June 2020	December 2020	July 2021
+26%	**+21%**	**+27%**

Follow a healthy and balanced diet

Perceived variation:

June 2020	December 2020	July 2021
+24%	**+28%**	**+32%**

Recycle and reuse

Perceived variation:

June 2020	December 2020	July 2021
+26%	**+29%**	**+32%**

Doing sports

Perceived variation:

June 2020	December 2020	July 2021
+8%	**+15%**	**+10%**

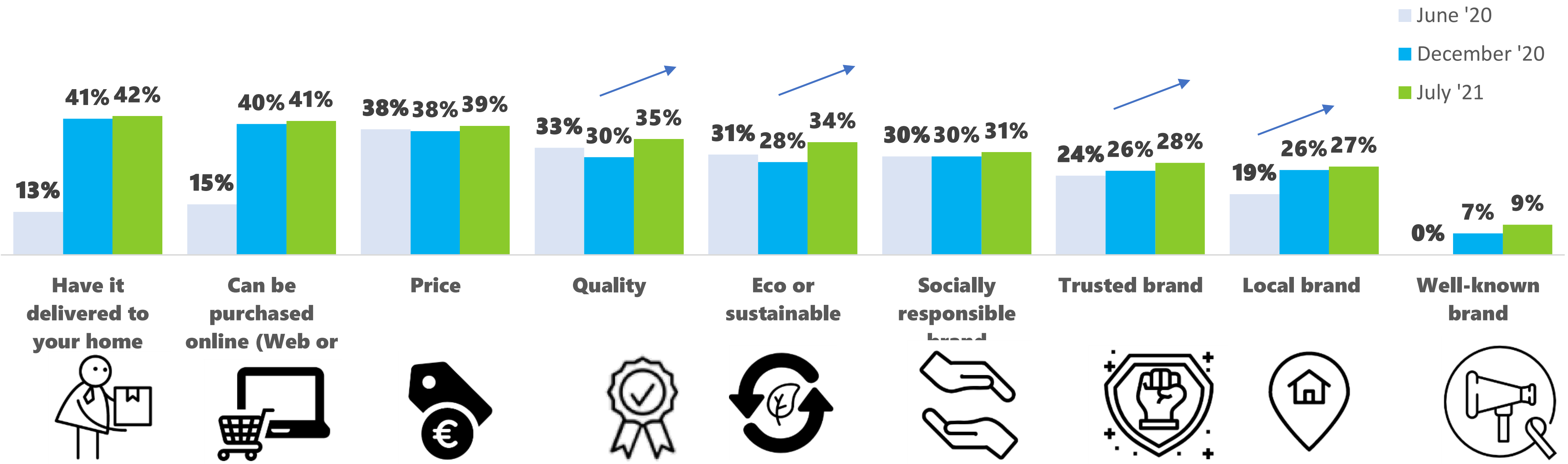
Health

Shopping priorities are changing

Delivery and online shopping are of increasing importance in the purchase, but also factors such as **quality, eco and local products** are becoming more relevant.

Evolution of the importance of the different purchasing aspects

Difference (More important - More important than before)



P5. In the future, to what extent do you think each of the following factors will be more or less important than before COVID-19 when buying products or services?

Safe mobility… more sustainable mobility?

Options that reinforce peoples security gain importance, the use of public transportation is still seen with reservations (especially in LATAM)

Walking, getting around on foot

Perceived variation:

June 2020	December 2020	July 2021
+8%	**+17%**	**+13%**

Use my own vehicle

Perceived variation:

June 2020	December 2020	July 2021
+13%	**+19%**	**+20%**

Use public transportation

Perceived variation:

June 2020	December 2020	July 2021
-26%	**-23%**	**-26%**

Mobility

A km0 mobility

The prospects of travelling by air or traveling abroad are still not recovering

Travelling within the country

Perceived variation:

June 2020	December 2020	July 2021
-3%	**+0%**	**+0%**

Travelling by plane

Perceived variation:

June 2020	December 2020	July 2021
-16%	**-15%**	**-19%**

Travelling abroad

Perceived variation:

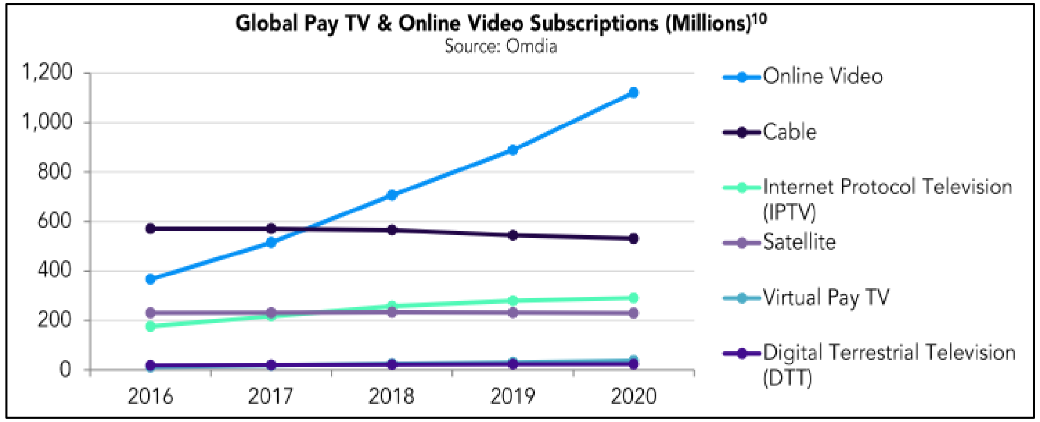
June 2020	December 2020	July 2021
-15%	**-14%**	**-20%**

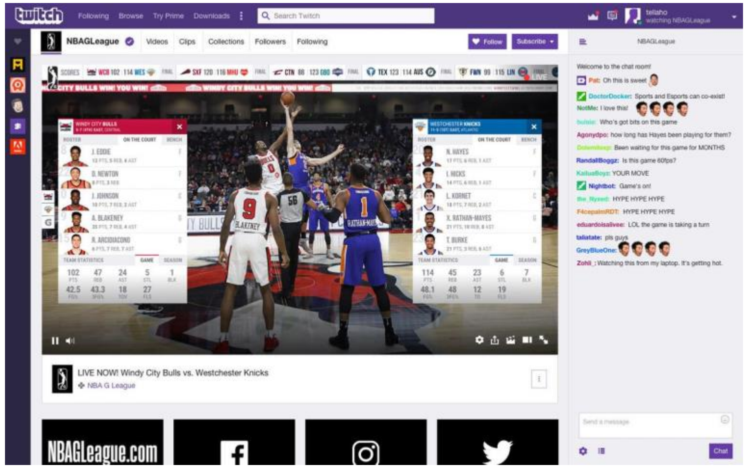
Leisure time

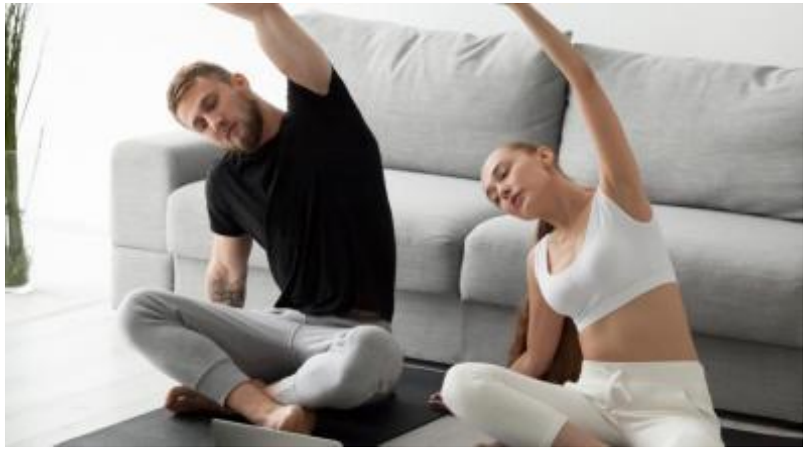
A large part of leisure time activities have shifted to the home

Rediscovering new ways of consumption

"Subscriptions exceed one billion in the pandemic".





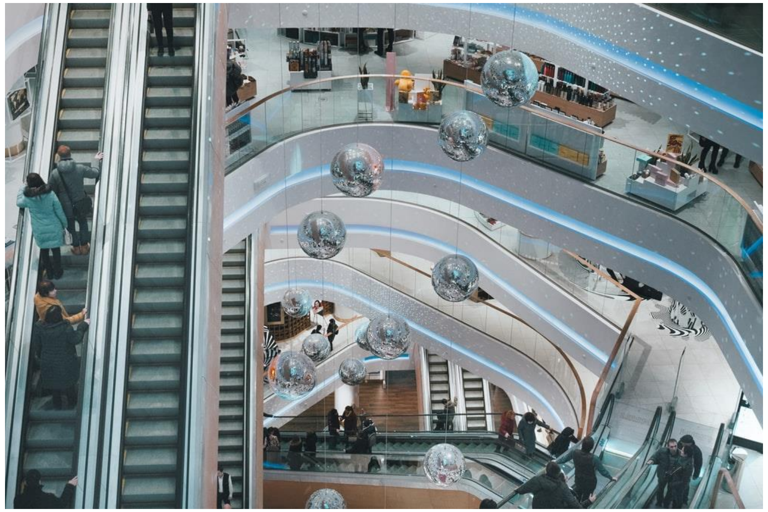


Leisure time

Mass activities are facing limitations

Out of obligation or precaution: mass activities are still less frequent.

Go to a shopping mall



Perceived variation:

June 2020	December 2020	July 2021
-26%	**-21%**	**-23%**

Going to festivals and concerts

Perceived variation:

June 2020	December 2020	July 2021
-22%	**-17%**	**-24%**

Going to the cinema and theatre

Perceived variation:

June 2020	December 2020	July 2021
-22%	**-17%**	**-24%**

Leisure time

Other (less crowded) activities are slowly recovering

In social surroundings that are considered to be increasingly controlled, a frequency similar to PRE-COVID is soon to be expected.

Lunch or dinner out

Perceived variation:

June 2020	December 2020	July 2021
-17%	-12%	-8%

Going to the gym

Perceived variation:

June 2020	December 2020	July 2021
-10%	-5%	-9%

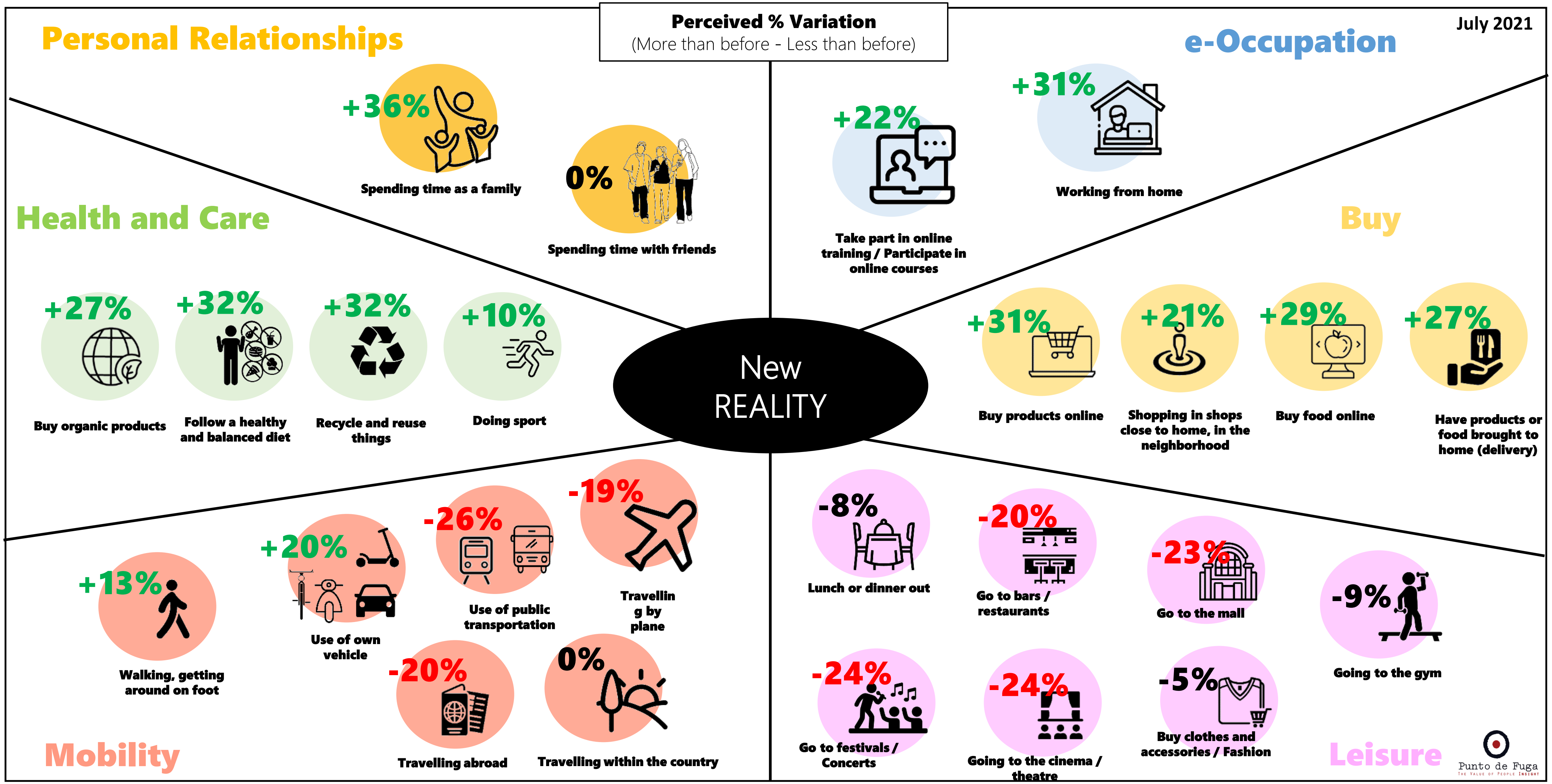
Buy clothes and accessories / Fashion

Perceived variation:

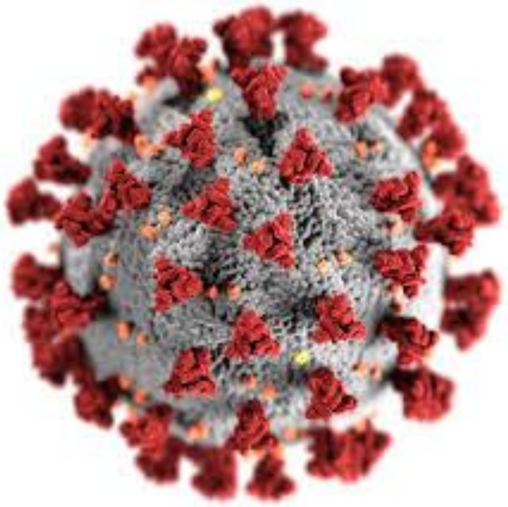
June 2020	December 2020	July 2021
-18%	-7%	-5%

Behaviour patterns that shape the new REALITY

Punto de Fuga
THE VALUE OF PEOPLE INSIGHT



Key Insights
"From the New Normal to Reality".



3rd edition -2021

The POST COVID gap

Differences in the pace of vaccination and economic impact create a POST COVID gap between countries but also between generations.

Overall, high degree of uncertainty and no real way out in a year's time.

5 attitudes emerge to face this new reality.

The new normal is REALITY

(Hybrid) home office is no longer the exception

New (online) purchasing channels that achieve high satisfaction rates are normalized.

Delivery, quality and eco are important

Growing awareness of the need to take care of the own health as well as the planet's health

In search of safer mobility: becoming more sustainable and local

New forms of spending leisure time at and consumption from home are consolidated.

Home is more important than ever

Listening to the consumer in this new reality will be key to the success of any brands value propositions.

Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

From the new normal to reality
3rd Wave

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ARTIS
the result network

September 2021

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

Punto de Fuga

Punto de Fuga is a quantitative and qualitative research institute.

Research based on a thorough knowledge of **PEOPLE**, in order to provide brands with **INSIGHTS** that bring added **VALUE**

Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

Which team will go along with you on your journey to the consumer?

With a global vocation

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

