Trans-pandemic Society

(Re)Learning to live

Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

ARTIS
the result network

February 2022

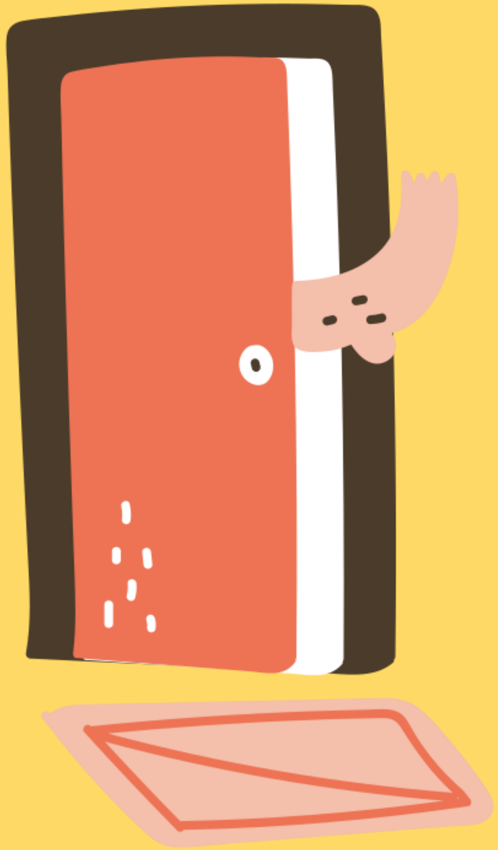
"To live means to learn to lose what you have achieved... and to move on".

Agenda

Trans-pandemic society

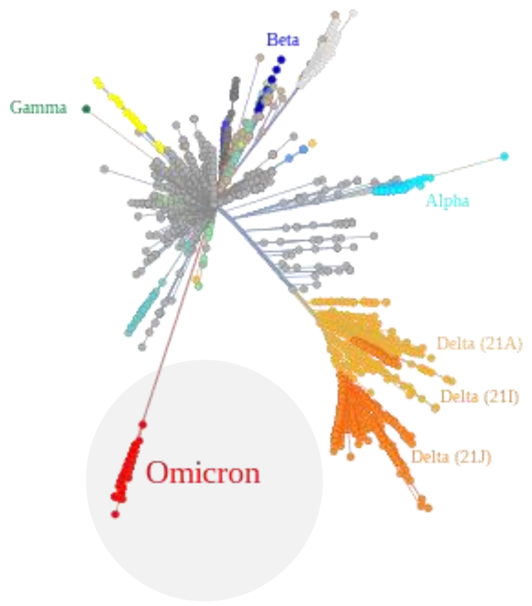
(Re)learning to live

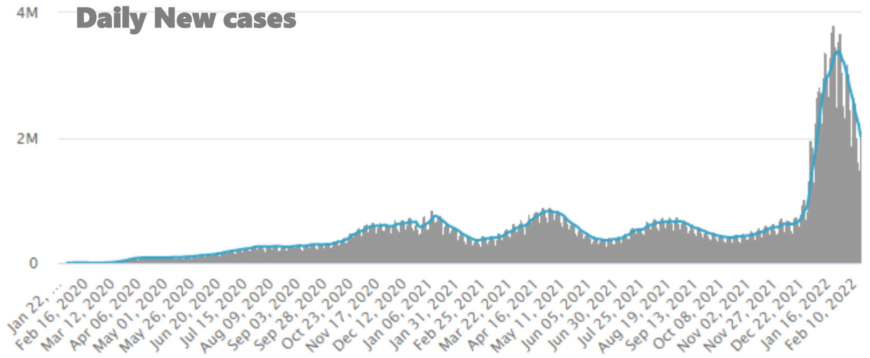
The Context

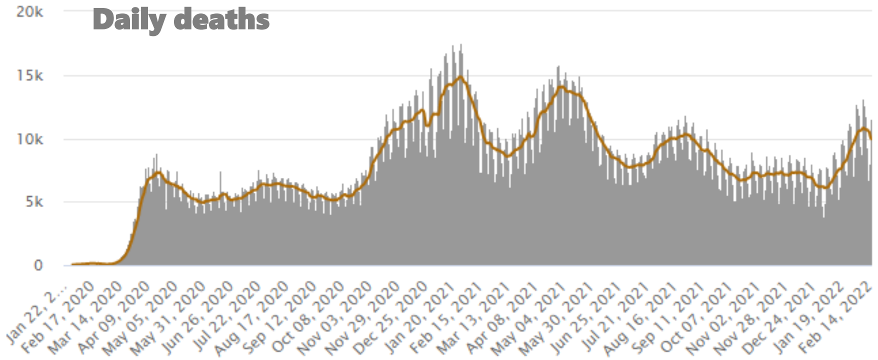


2 years in pandemic, more than 6 million deaths

In the last wave, vaccines and the reduced aggressiveness of the Omicron variant have made it possible to contain the death rate (although the number of deaths has exceeded those recorded in previous waves).







Total Cases	Total Deaths	Total Vaccine Doses Administered
450.278.766	6.017.649	10.633.262.215
28-Day Cases	28-Day Deaths	28-Day Vaccine Doses Administered
48.766.210	248.195	512.090.432

09/03/2022 Actualización en: *https://coronavirus.jhu.edu/map.html*

but have we reached the end?


HEALTH AND SCIENCE

Omicron is fading, but nobody knows when the pandemic will finally end

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Spencer Kimball
@SPENCEKIMBALL

8 KGW

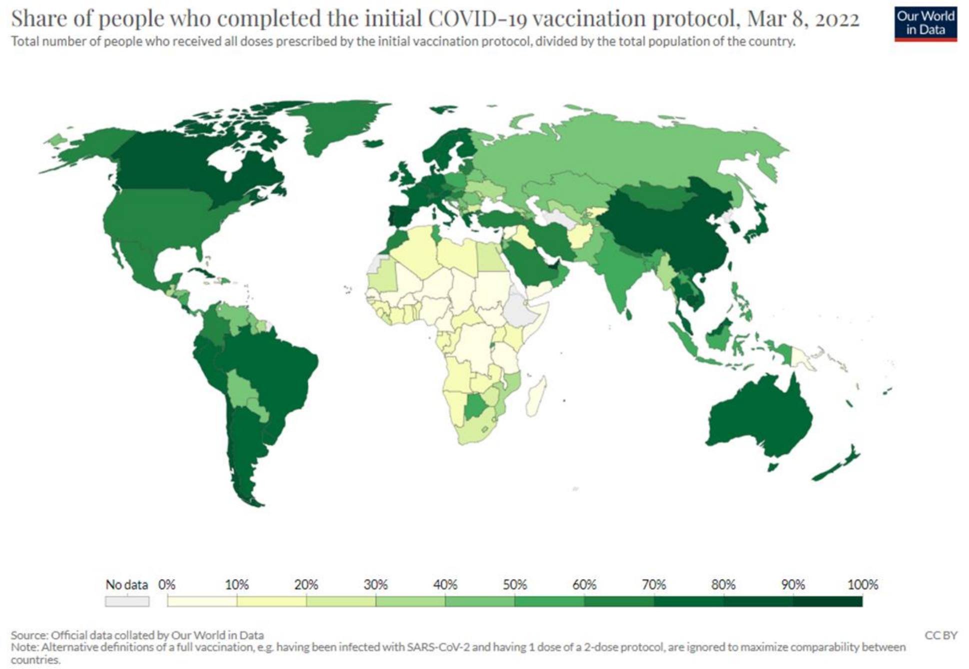
The omicron wave is passing but experts say the pandemic is not over

That is translating into good news for hospitals. "We had another good week of data come in; the reality is the hospitalizations fell 250...

Next Covid variant could be 'worse than Omicron', UK health official warns

Future Covid variants could be worse than Omicron, a senior UK health official has warned. Speaking at a Downing Street Covid briefing...

Vaccination peaks and stagnates with an increasing breach between countries



Feb 2022: **56%** of the world's population is vaccinated.

Uncertainty is not only related to the pandemic: A highly complex panorama

INFLATION

CRISIS

WAR

ENERGY

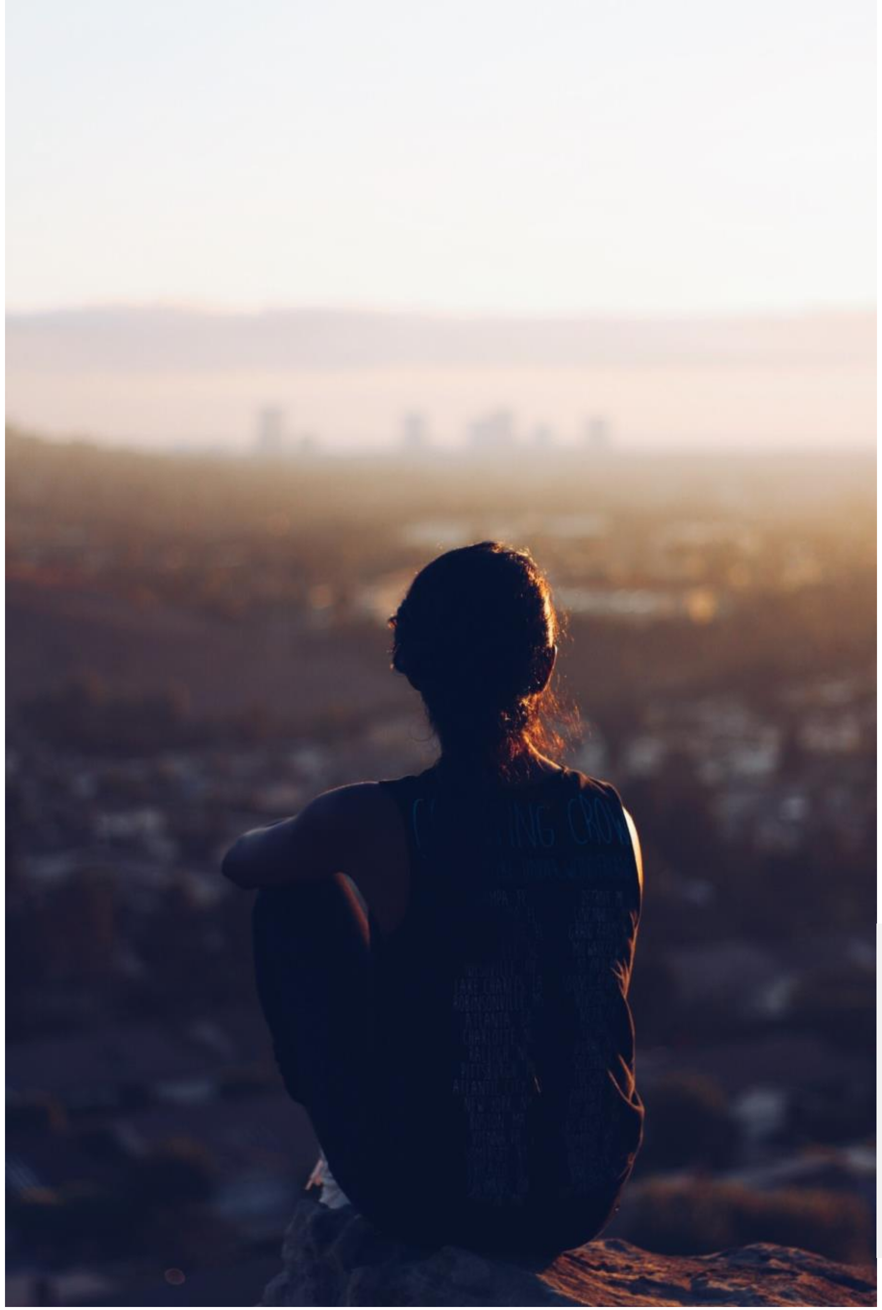
HUNGER

CLIMATE CHANGE

EXTREMISMS

POVERTY

MIGRATION



Against this background, we have launched **the 4th wave of our international social research**, with the aim of

… gauging the social mood after 2 years of pandemic

… and to determine the newly established social patterns in the post covid society.

3,050 interviews

METHODOLOGY
Online interviews
LOI: 15 minutes
Carried out between 7th and 10th of February 2022

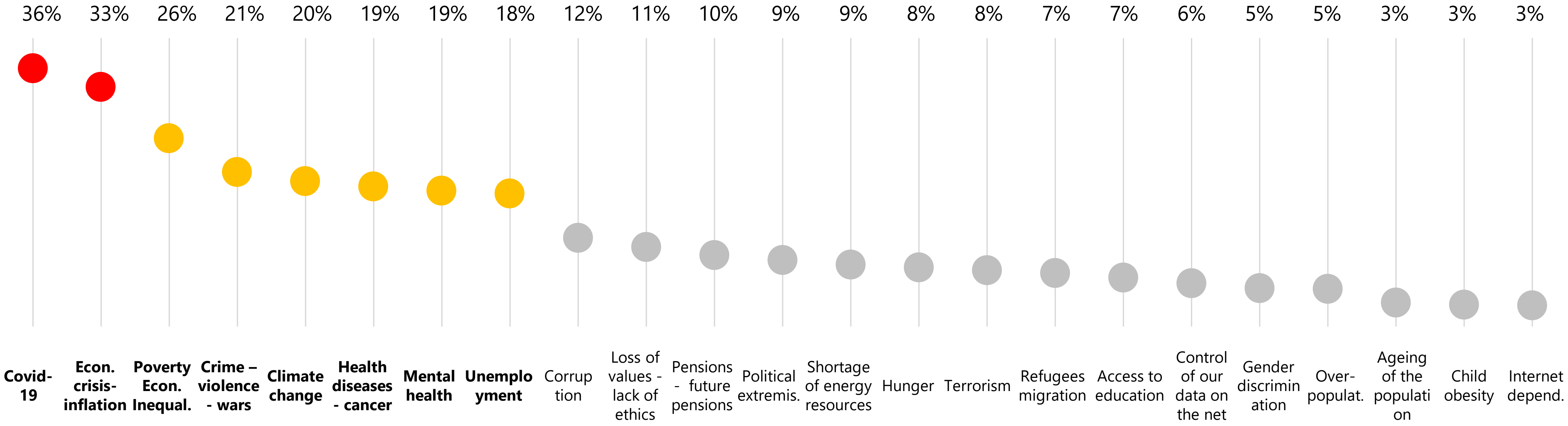
TARGET
Individuals over 18 years of age
Worldwide in 10 countries
Sampling error (95% CI): +1.8% globally; +5.7% per country

Worries and expectations for the future

COVID-19 remains the main concern

close behind economic issues (inflation, poverty, job insecurity), war, climate change and health diseases.

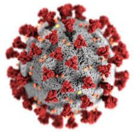
Top worries (1st+2nd+3rd place)

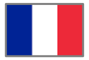


Total sample: 3.050 respondents
Question: What worries you more currently? Secondly? Third?

* Data collected in February, the 10th

The pandemic keeps being a big concern all around



Top worries (1st+2nd+3rd place)	TOTAL COUNTRIES										
Covid-19/ pandemics	**36%**	30%	**30%**	**39%**	24%	**33%**	27%	**56%**	**38%**	**48%**	**33%**
Economic crisis/inflation	**33%**	**31%**	24%	24%	**31%**	**33%**	**50%**	38%	34%	37%	29%
Poverty / economic inequalities	**26%**	21%	29%	24%	23%	23%	33%	41%	24%	28%	15%
Wars/Crime/violence	**21%**	16%	23%	18%	16%	15%	32%	21%	25%	26%	21%
Climate change	**20%**	17%	24%	33%	24%	23%	15%	7%	18%	20%	22%
Health diseases / cancer	**19%**	30%	25%	21%	26%	26%	11%	14%	10%	16%	16%
Mental health	**19%**	25%	9%	13%	15%	26%	16%	26%	20%	17%	21%
Job insecurity / Unemployment	**18%**	**31%**	20%	10%	18%	17%	23%	5%	17%	21%	22%
Corruption	**12%**	10%	5%	9%	10%	9%	22%	18%	13%	15%	14%
Loss of values / lack of ethics	**11%**	10%	11%	7%	11%	9%	13%	11%	11%	10%	18%
Pensions / future pensions	**10%**	16%	8%	20%	10%	11%	4%	2%	16%	6%	7%
Political extremism	**9%**	9%	9%	10%	9%	8%	4%	12%	10%	4%	17%
Shortage of energy resources	**9%**	7%	9%	7%	19%	16%	7%	4%	7%	5%	4%
Hunger	**8%**	11%	9%	6%	5%	7%	15%	2%	7%	10%	10%
Terrorism	**8%**	4%	19%	12%	9%	12%	2%	3%	7%	2%	8%
Refugees / Immigration movements	**7%**	4%	9%	15%	6%	12%	2%	2%	14%	2%	8%
Access to education	**7%**	3%	7%	4%	9%	2%	8%	14%	7%	8%	5%
Control of our data on the net	**6%**	5%	7%	9%	10%	4%	4%	5%	4%	4%	8%
Gender discrimination	**5%**	9%	5%	4%	4%	2%	5%	7%	6%	7%	4%
Overpopulation	**5%**	3%	8%	7%	9%	8%	2%	1%	3%	7%	5%
Ageing of the population	**3%**	4%	3%	5%	8%	2%	1%	2%	2%	1%	7%
Childhood obesity	**3%**	3%	3%	3%	3%	2%	1%	2%	4%	6%	3%
Internet dependency	**3%**	3%	5%	3%	0%	2%	2%	6%	2%	2%	6%

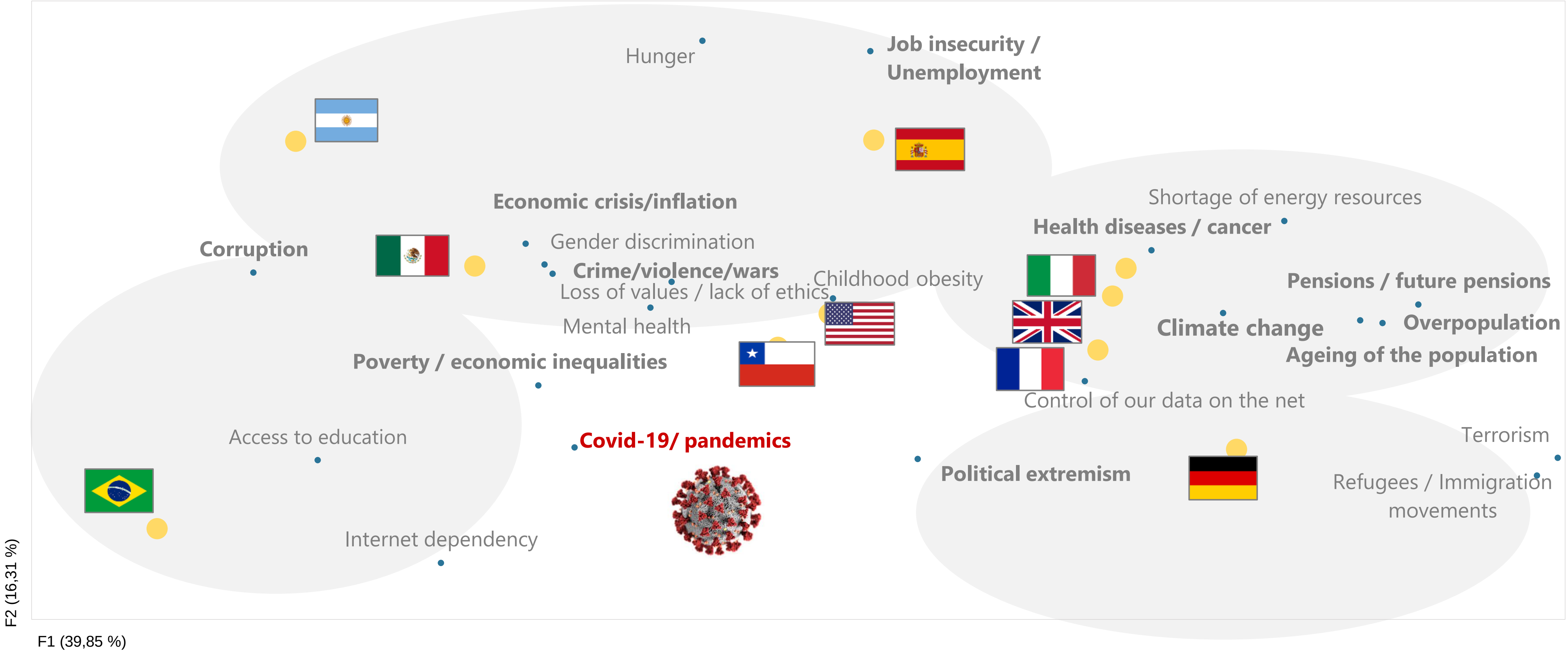
Total sample: 3.050 respondents
Question: What worries you more currently? Secondly? Third?

* Data collected in February, the 10th

Top 5 concerns

But it is not only COVID-19 that worries us

Focus on corruption in LATAM countries; Unemployment in Spain; Climate change, future pensions, health diseases and ageing of population in Europe. Violence/war is also a concern



Total sample: 3.050 respondents
Question: What worries you more currently? Secondly? Third?

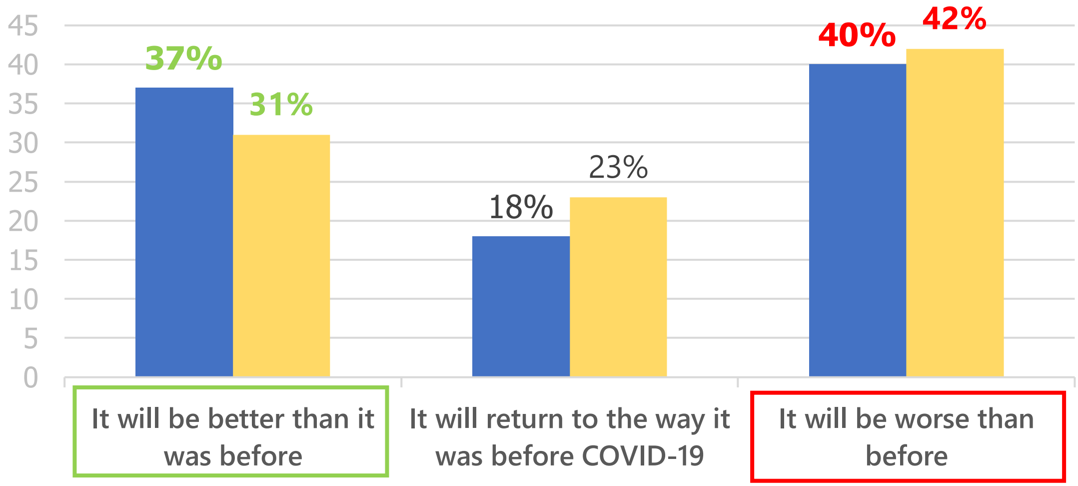
* Data collected in February, the 10th

The macroeconomic outlook is not very optimistic

42% of respondents said that it will be worse than before COVID-19 pandemic. Less optimistic outlook than in July'21

Expected economic	
July'2021	-3
February'2022	-11

*Difference between better and worse



	Future economic situation			Index of change FEB 2022	vs July
	Better	Same	Worse		
	27%	28%	42%	-15	↗
	29%	24%	40%	-11	↘
	30%	24%	45%	-15	↘
	30%	27%	40%	-10	↘
	20%	21%	**56%**	**-36**	↘
	19%	20%	**58%**	**-39**	↘
	39%	35%	32%	+7	↗
	40%	17%	39%	+1	↘
	46%	24%	27%	+19	↗
	30%	17%	45%	-15	↘

↗ ↘ **Better/worse perspectives than in July'21**

Total sample: 3.050 respondents
Question: Regarding the ECONOMIC SITUATION, what do you expect for the next months? Regarding the economic situation in your country

Immediate problems exacerbate fears

% who is very worried about...

More present in...

the price rise / inflation rate **[43%]**

the increasing poverty and inequalities **[35%]**

a new immediate wave of COVID **[31%]**

a energy black out **[22%]**

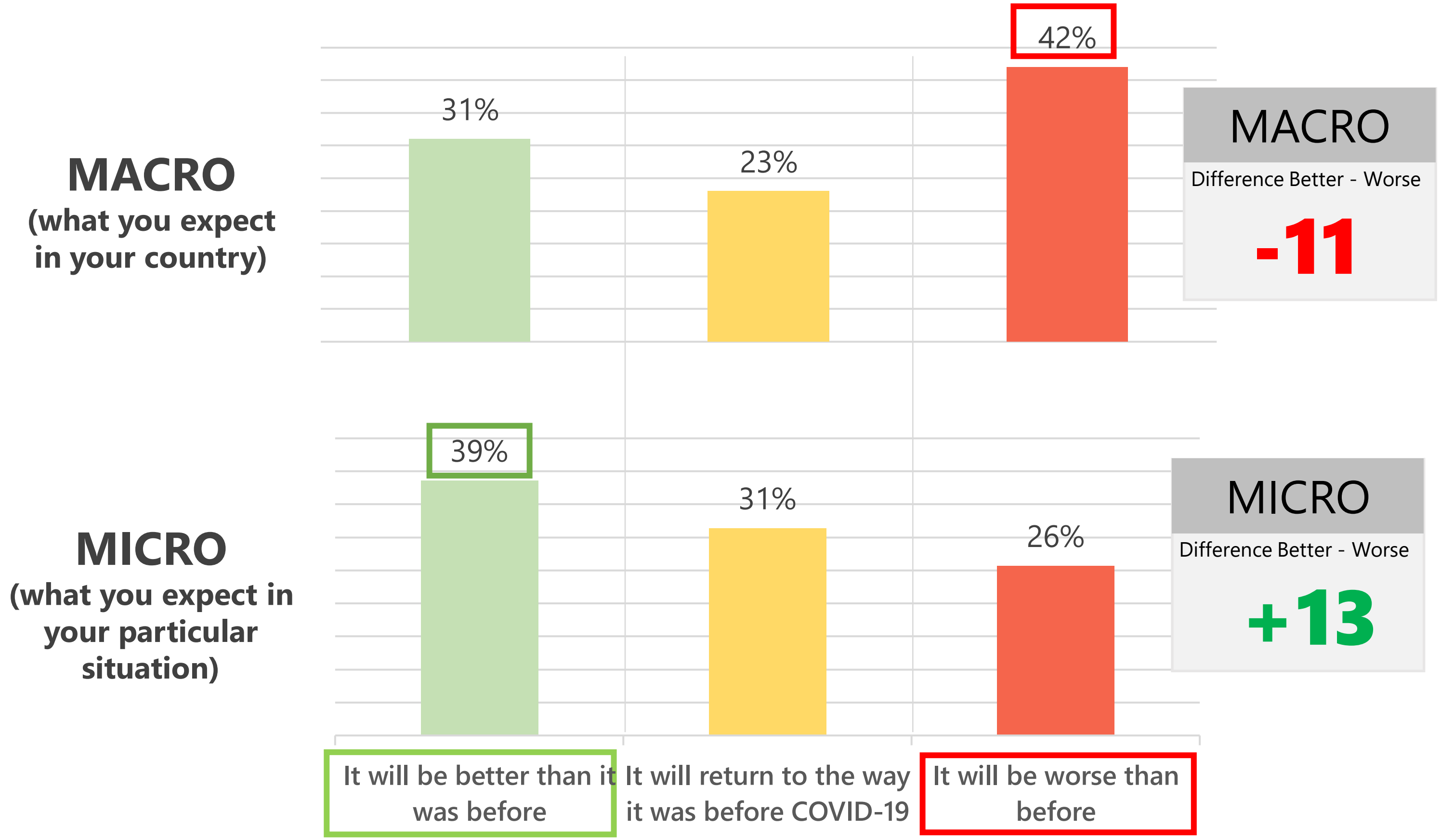
a war in Europe **[19%]**

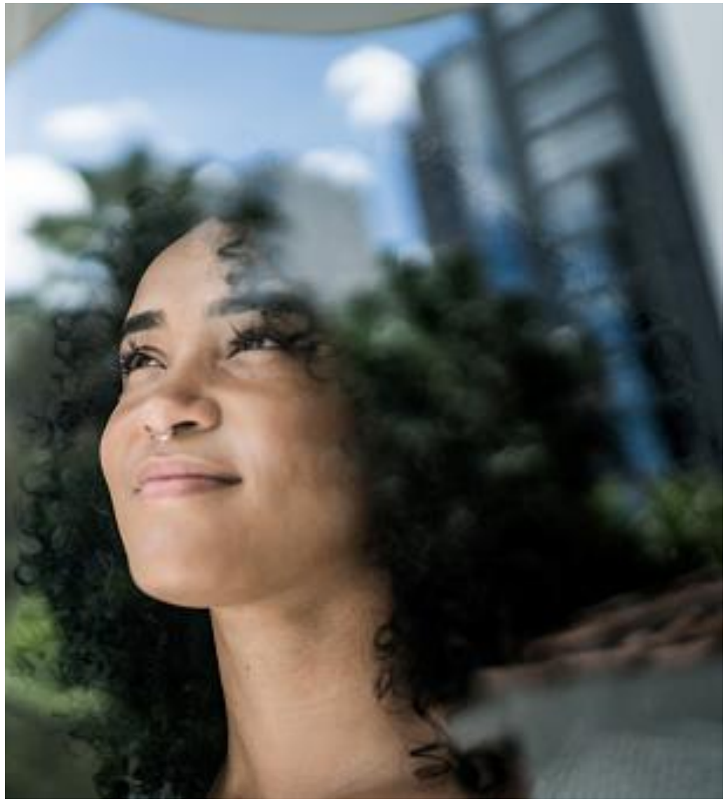
* Data collected in February, the 10th

Total sample: 1,613 respondents
Question: To what extent are you concerned about the possibility of...?

Expectations at the micro level are somewhat better

Only 26% of respondents say their personal finances will get worse, while almost 40% think they will get better.





Total sample: 3.050 respondents
Question: Regarding the ECONOMIC SITUATION, what do you expect for the next months? Regarding the economic situation in your country and particularly your situation.

We live in emotional ambivalence:

positive emotions coexist with tiredness, anxiety and worry. We are tired of being tired

Sentiment ratio (negative and positive emotions)

	Negative	Positive
JUNE 2020	42%	58%
DECEMBER 2020	44%	56%
JULY 2021	39%	61%
FEBRUARY 2022	39%	61%

Total sample: 3.050 respondents
Question: Select 3 words that describe your current mood.

Worlde from Feb 2022 data

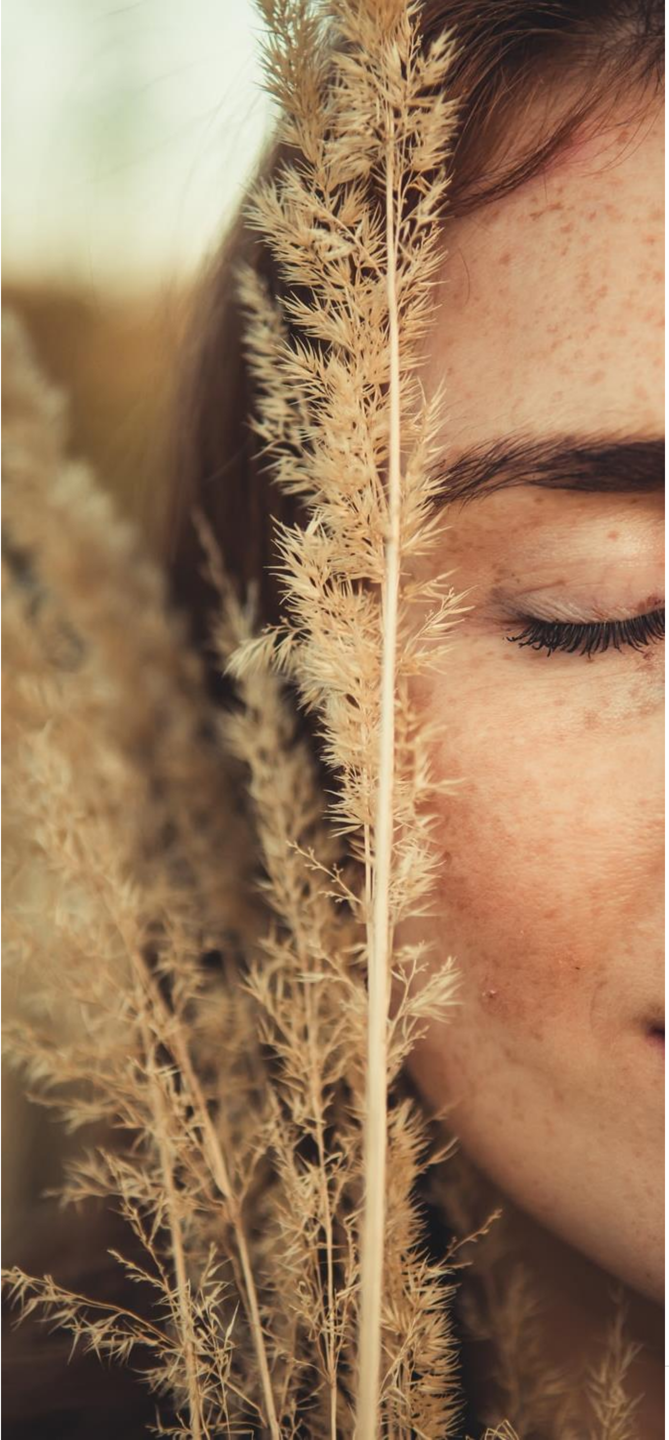
Emotional changes appear very slowly

Moods such as "worried", "fearful", "sad", "overwhelmed" or "angry" decrease as gratitude, activity and happiness increases. However, fatigue and anxiety continue to define our mood.

	Jun 2020	Dec 2020	July 2021	Feb 2022
Worried	28%	26%	**22%**	**22%** ▼
Tired	19%	22%	23%	20%
Anxious	18%	19%	18%	19%
Unsafe	10%	9%	10%	8%
Nervous	9%	8%	8%	8%
Fearful	9%	7%	**6%**	**6%** ▼
Depressed	9%	10%	7%	9%
Sad	8%	8%	**6%**	**6%** ▼
Disappointed	7%	7%	7%	8%
Alone	7%	7%	6%	7%
Vulnerable	7%	6%	7%	6%
Overwhelmed	7%	8%	**6%**	**6%** ▼
Angry	5%	5%	**4%**	**4%** ▼
Incredulous	4%	3%	3%	3%
Shocked	1%	1%	1%	2%

	Jun 2020	Dec 2020	July 2021	Feb 2022
Hopeful	26%	23%	26%	22%
Quiet	18%	16%	17%	16%
Confident	17%	13%	14%	14%
Calm	17%	14%	16%	14%
Grateful	15%	15%	**16%**	**22%** ▲
Relaxed	13%	14%	15%	13%
Active	13%	12%	**14%**	**13%** ▲
Happy	12%	14%	12%	**16%** ▲
Safe	9%	8%	8%	7%
Committed	8%	8%	9%	10%
Creative	8%	10%	9%	9%

Total sample: 3.050 respondents
Question: Select 3 words that describe your current mood.



3 ways of coping with reality
3 attitudinal typologies

PESSIMISTIC

The pandemic has left me in a **bad state of mind**

I feel that I will **never be able to recover my old life**

I am more **nervous about getting into big investments**

35%

ADAPTATIVE

I feel **grateful and hopeful**

I want to spend more time with **my children, family and friends**

I have become **thriftier**

I feel like **doing new things** as soon as I can

32%

EMPOWERED

You have to **squeeze life**

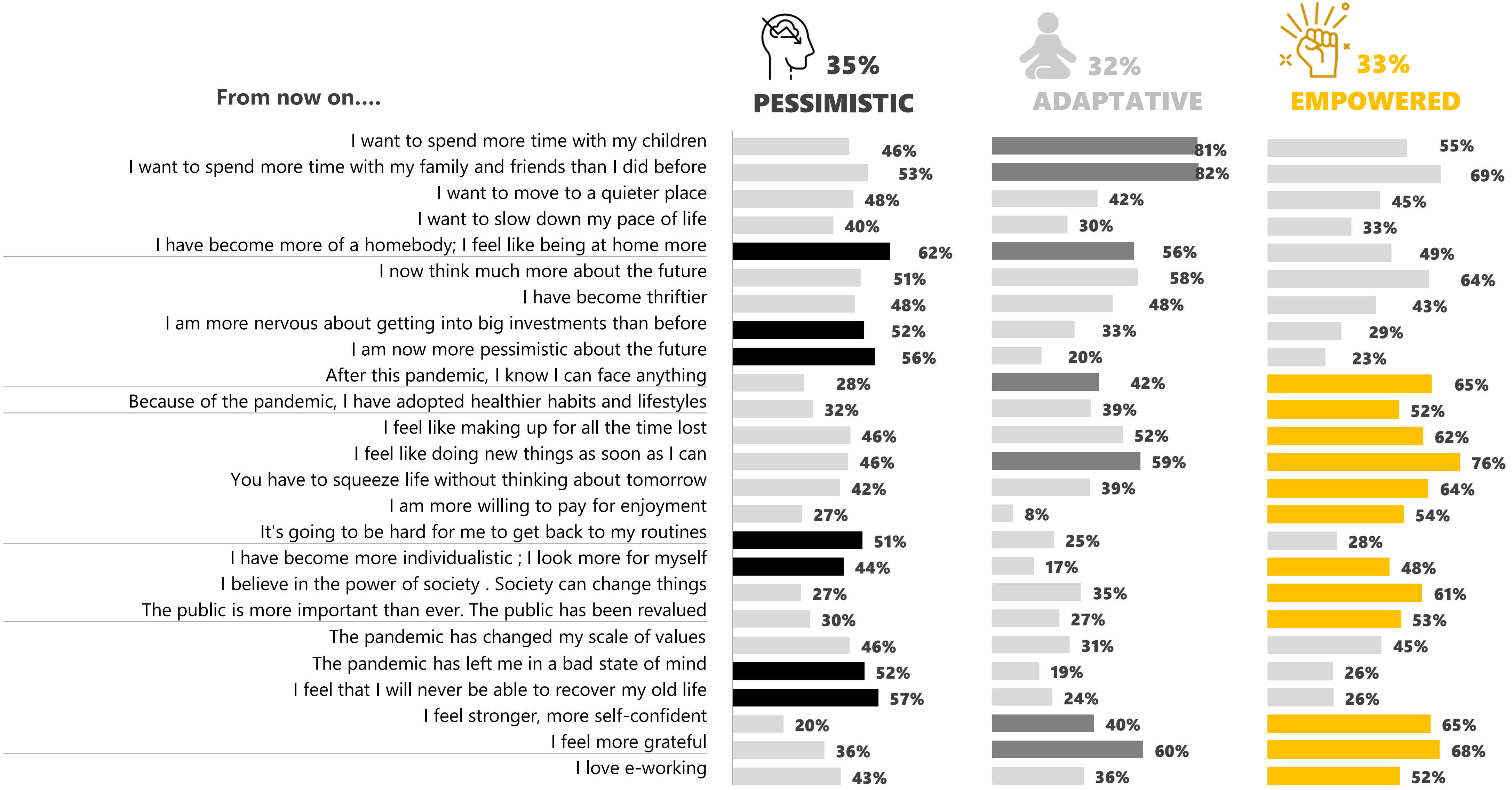
I am more **willing to pay for enjoyment**

I have adopted **healthier habits and lifestyles**

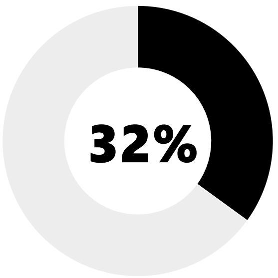
I feel stronger, **more self-confident**

33%

Different attitudes towards post pandemic life



PESSIMISTIC



Spain	44%
France	45%
Germany	37%
Italy	45%
UK	45%
Argentina	26%
Brazil	33%
Chile	32%
Mexico	16%
USA	33%

PESSIMISTICS are the hopeless ones. Pandemic has had an impact on them and now are trying to start over despite constraints and fears. Concerns and anxiety are based on economic crisis, health, hunger and Covid-19. Even though this profile believes that it is an endemic, is worried about new variants and just 49% thinks that normality will be recovered before two years.

Finally, pessimists are the ones with less future prospects about country's economy

DEMOGRAPHIC PROFILE

Gender

Male	Female
50	50

Age

18 - 34	35 - 54	55 or +
38	45	17

COVID IMPACT

	GROUP	BENCHMARK
% "Very worried" for exposure to COVID	19%	19%

FINANCE

Income variance with COVID	-13	+13
Savings variance with COVID	+3	+11
Particular economic expectations	-3	+13

LIFE ATTITUDES

The pandemic has left me in a **bad state of mind**

I feel that I will **never be able to recover my old life**

I am more **nervous about getting into big investments**

MOOD & FEELINGS

I feel... ***WORRIED (29%)***
TIRED (28%)
ANXIOUS (26%)
DEPRESSED (15%)

EXPECTED NORMALITY

ALREADY NORMAL	2 YEARS	3 YEARS	NEVER
7%	49%	15%	16%

HABITS ACQUIRED (Index)

Spend time with family and friends	79
More of a homebody	111
More pessimistic about future	167
Adopt healthier habits	78
Doing new things as soon as I can	76
More individualistic	120
Willing to pay for enjoyment	91
I know I can face anything now	63

CHANGING DRIVERS

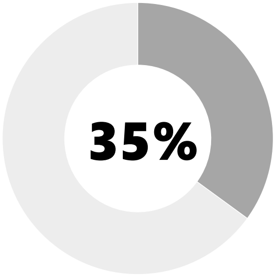
More important – Less important

GROUP	REFERENCIA TOTAL	
+29%	+31%	Entrega
+24%	+25%	Online
+43%	+42%	Precio
+28%	+33%	Calidad
+23%	+28%	Eco
+18%	+25%	RSC

Referencia total

ADAPTATIVE

Punto de Fuga



Spain	30%
France	26%
Germany	25%
Italy	26%
UK	31%
Argentina	41%
Brazil	32%
Chile	38%
Mexico	45%
USA	30%

CONFORMISTS are realistic and aware of what the pandemic means but have adapted. They appreciate and enjoy the little things but are eager to return to normality.
With COVID they have revalued the little things, time with their loved ones, and being at home. Although they do not expect to return to normality in the short term, they are more grateful and hopeful.
A profile with more presence in Latin American countries

DEMOGRAPHIC PROFILE

Gender

Male	Female
44	56

Age

18 - 34	35 - 54	55 or +
30	45	25

COVID IMPACT

	GROUP	BENCHMARK
% "Very worried" for exposure to COVID	21%	19%

FINANCE

Income variance with COVID	+18	+13
Savings variance with COVID	+9	+11
Particular economic expectations	+18	+13

LIFE ATTITUDES

I want to spend **more time with my children**

I want to spend **more time with my family and friends**

I feel like **doing new things** as soon as I can

MOOD & FEELINGS

I feel... ***GRATEFUL (29%)***
HOPEFUL (28%)
WORRIED (23%)
QUITE (18%)

EXPECTED NORMALITY

ALREADY NORMAL	2 YEARS	3 YEARS	NEVER
12%	53%	10%	14%

HABITS ACQUIRED (Index)

Spend time with family and friends	121
More of a homebody	101
More pessimistic about future	58
Adopt healthier habits	96
Doing new things as soon as I can	98
More individualistic	45
Willing to pay for enjoyment	27
I know I can face anything now	94

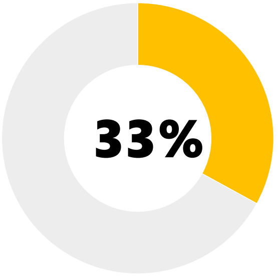
CHANGING DRIVERS

More important – Less important

	GROUP	BENCHMARK
Delivery	+31%	+31%
Online	+25%	+25%
Price	+46%	+42%
Quality	+33%	+33%
Eco	+30%	+28%
RSC	+28%	+25%

Benchmark

EMPOWERED



26%
29%
38%
29%
24%
34%
36%
30%
40%
38%

The EMPOWERED profile are people who with COVID have experienced an increase in self-confidence and are optimistic. They are less affected by COVID financially, and want to make up for lost time as soon as possible. They are more willing to pay for entertainment.

A profile with a greater presence in Mexico, USA and Germany. It is also present among young people and millennials.

DEMOGRAPHIC PROFILE

Gender

Male	Female
49	51

Age

18 - 34	35 - 54	55 or +
44	41	15

COVID IMPACT

	GROUP	BENCHMARK
% "Very worried" for exposure to COVID	18%	19%

FINANCE

Income variance with COVID	+36	+13
Savings variance with COVID	+22	+11
Particular economic expectations	+36	+13

LIFE ATTITUDES

You have to **squeeze life.** I feel like **doing new things** as soon as I can

I feel **stronger,** more **self-confident**

I want to spend **more time with my family and friends**

MOOD & FEELINGS

I feel... ***GRATEFUL (29%)***
HOPEFUL (27%)
CONFIDENT (21%)
HAPPY (20%)

EXPECTED NORMALITY

ALREADY NORMAL	2 YEARS	3 YEARS	NEVER
13%	61%	11%	10%

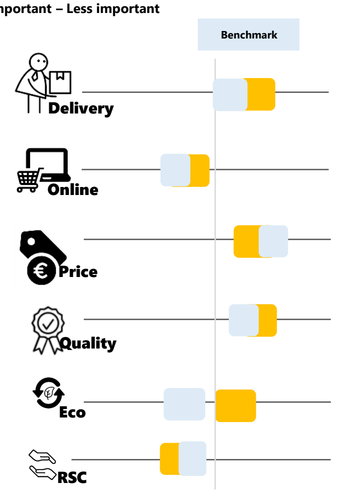
HABITS ACQUIRED (Index)

Spend time with family and friends	102
More of a homebody	88
More pessimistic about future	69
Adopt healthier habits	128
Doing new things as soon as I can	128
More individualistic	132
Willing to pay for enjoyment	180
I know I can face anything now	145

CHANGING DRIVERS

More important – Less important

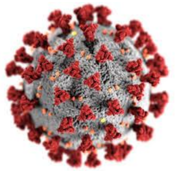
GROUP	BENCHMARK	
+34%	+31%	Delivery
+28%	+25%	Online
+38%	+42%	Price
+38%	+33%	Quality
+31%	+28%	Eco
+28%	+28%	RSC

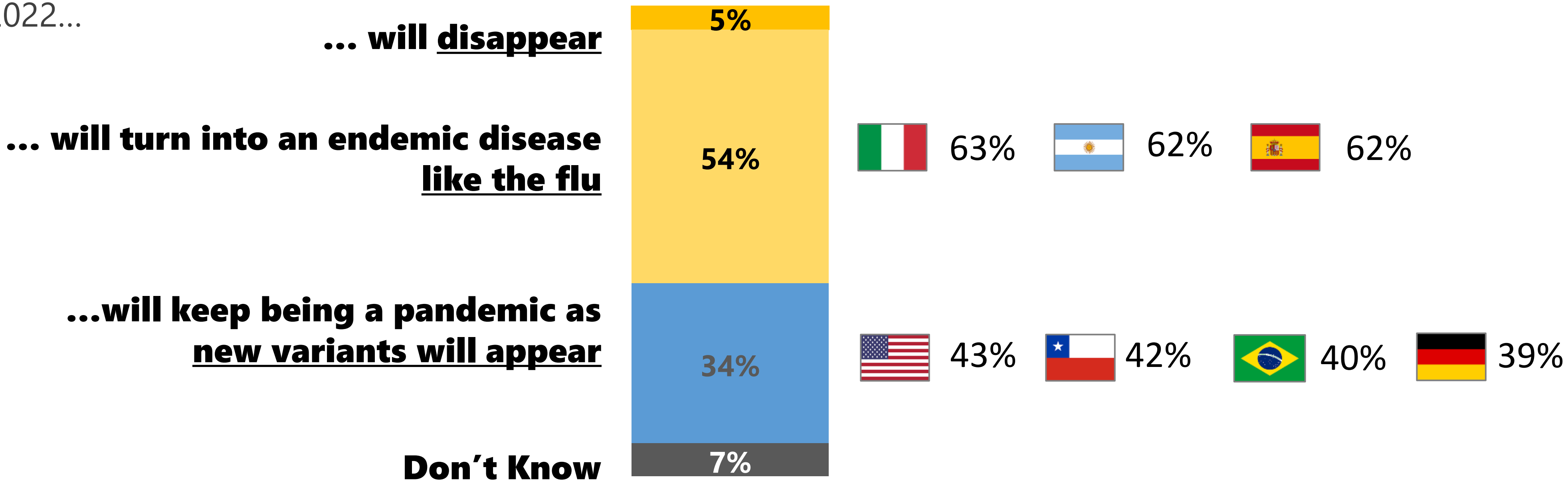


Will 2022 be the year of the end of the pandemic? We are skeptical

34% fear that new variants will cause new waves, but 54% expect it will eventually become an endemic disease like influenza. In any case, hardly anyone believes it will disappear.

COVID-19 IN 2022…



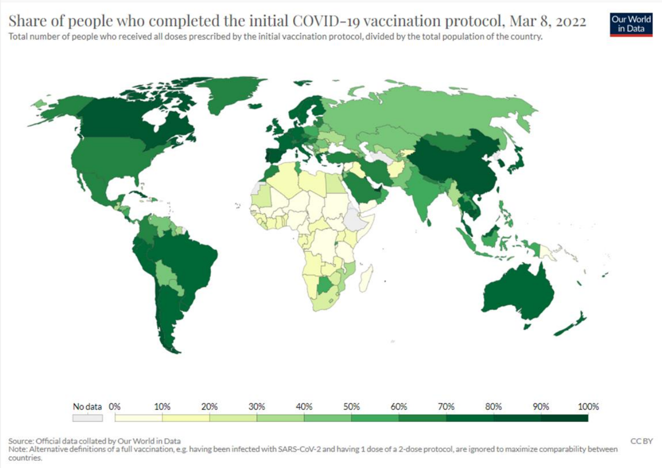


Total sample: 3.050 respondents
Question: Do you think that in 2022, COVID-19…?

An scepticism which grows over the global vaccination.

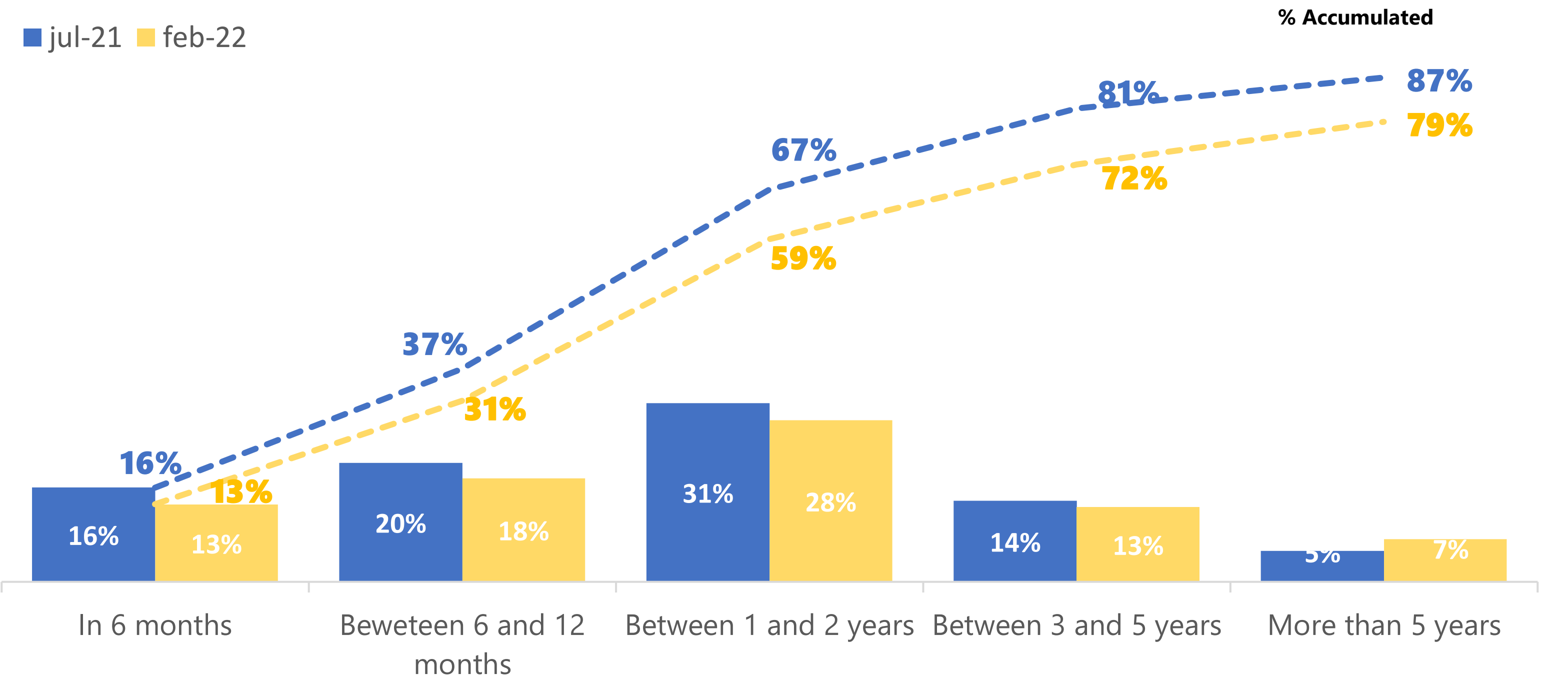
Universal availability/distribution of the vaccine is expected within 1-5 years. Greater optimism in Latin American countries. And above all, the alarming gap in access to vaccines between rich and poor countries is a dramatic reality.

56% of the world's population is vaccinated*.



* complete guideline. Data March, 8th 2022

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

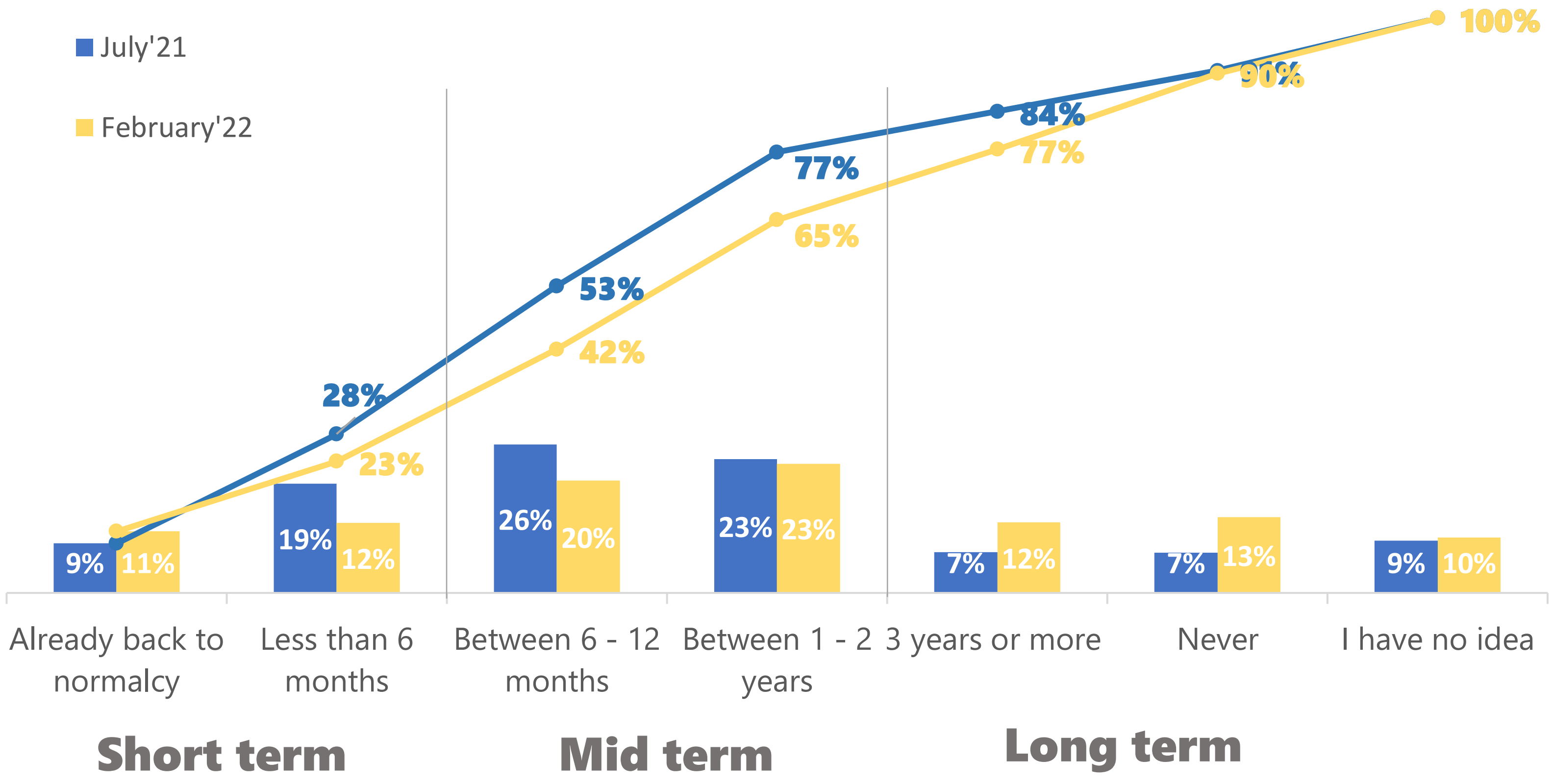


Total sample: 3.050 respondents
Question: When do you think a vaccine will be available for the entire world population?

Punto de Fuga

As a result, normality does not seem to be coming any time soon -Or at least it won't be like it used to be

Something that is becoming increasingly clear to society



Accumulated data

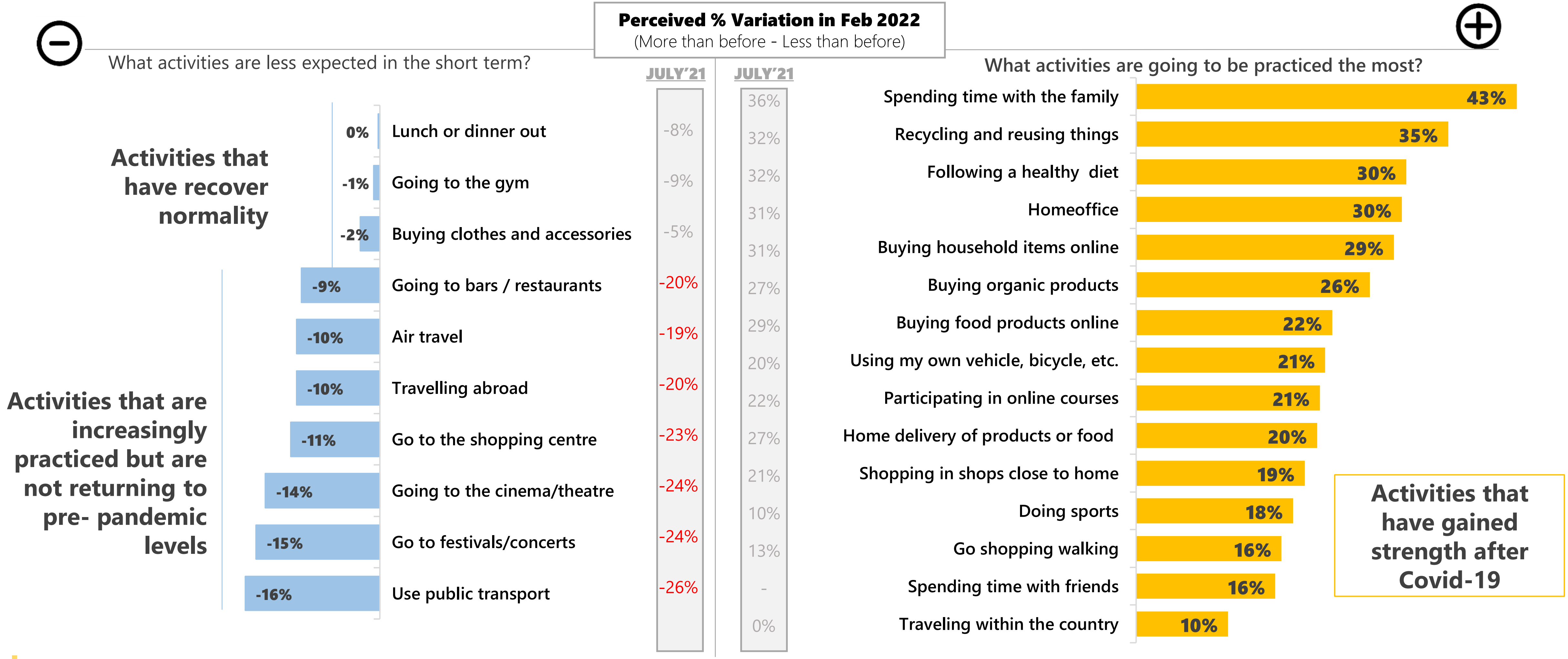
	Already normalcy	In 6 months	Within a year	Up to 2 years
Total	**11%**	**23%**	**42%**	**65%**
	9%	22%	45%	64%
	11%	21%	40%	58%
	4%	12%	35	58%
	8%	19%	40%	68%
	14%	29%	47%	62%
	16%	30%	49%	78%
	6%	21%	45%	68%
	9%	18%	35%	62%
	11%	25%	45%	72%
	20%	31%	43%	58%

Total sample: 3.050 respondents
Question: When do you expect to regain some normalcy in your life?

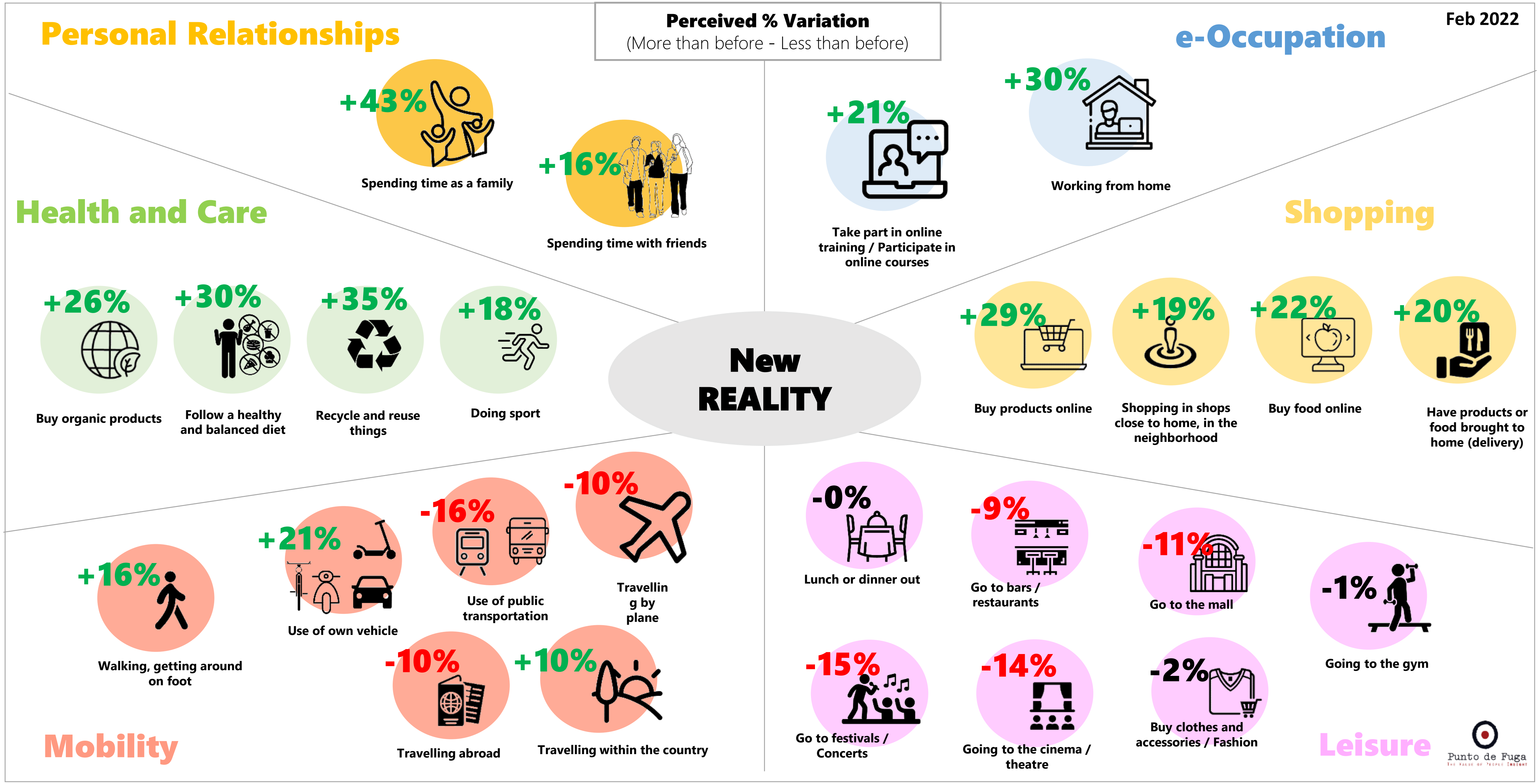
The pandemic has brought a new frame of reference

A change of reality

A reality in which the fear of social activities is progressively being lost, but in which new habits have been acquired that remain



Total sample: 3.050 respondents
Question: Do you think that after the threat of COVID-19 you will do less, about the same, or more of each of the following activities compared to the 12 months before COVID-19 started?



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

The trans pandemic society: some keys

Punto de Fuga
The Value of People Insight

ARTIS

The trans pandemic society: some keys

- **#1.** My people, my tribe… my home
- **#2.** Uncertainty makes us cautious
- **#3.** Health worries us and occupies us
- **#4.** Squeeze and savour life. Cherishing the present
- **#5.** Public is valued, but we focus on the self
- **#6.** Digital shopping: not out of security but out of desire
- **#7.** Sustainability under construction
- **#8.** Work revolution.New models of work
- **#9.** Mobility still km0… but looking far ahead
- **#10.** If the economy is uncertain, don't forget the price

#1. My people, my tribe… my home

Because of the pandemic we have reevaluated family time

and as restrictions are lifted, more time with friends is also sought

[67%]
Spend more time with my family and friends is a priority

[60%]
Spend more time with my children is a priority

[% Totally+quite agree]

Spending time with family

Perceived variation:

June 2020	December 2020	July 2021	February 2022
+24%	+28%	+32%	**+30%** ▲

Spending time with friends

Perceived variation:

June 2020	December 2020	July 2021	February 2022
+3%	+6%	+0%	**+16%** ▲

Total sample: 3.050 respondents
Question: Do you think 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?

Variation vs previous measurement ▲▼

But even we are gradually opening up to the outdoors, we have rediscovered

the pleasure of being at home.

I have become more of a homebody **[56%]**

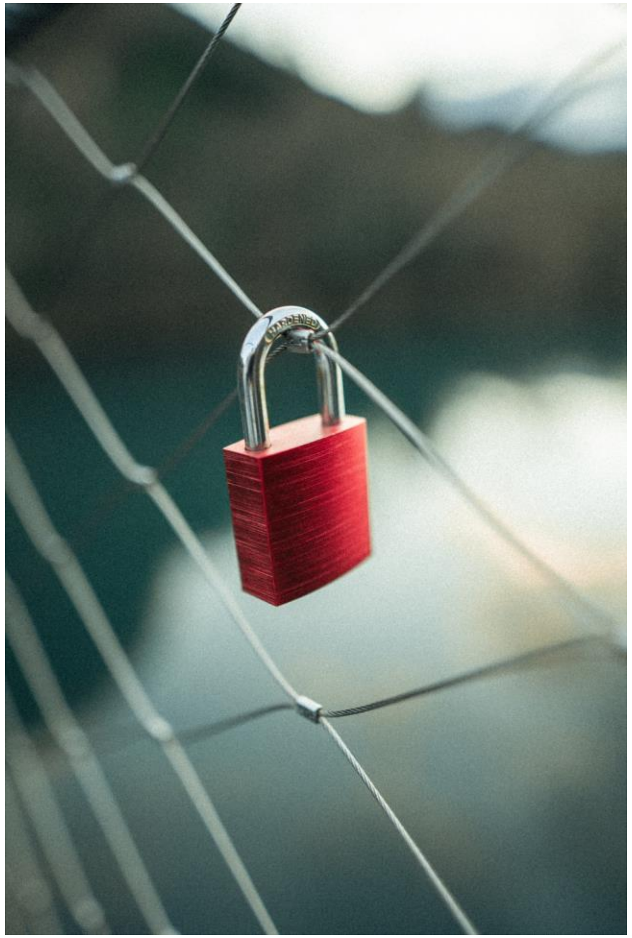
I want to move to a quieter place **[45%]**

I want to slow down my pace of life **[34%]**

[% Totally+quite agree]

#2. Uncertainty makes us cautious

The pandemic and recent developments affect the base of the pyramid: security.



... risk aversion is on the rise.

[57%] I now think much more about the future

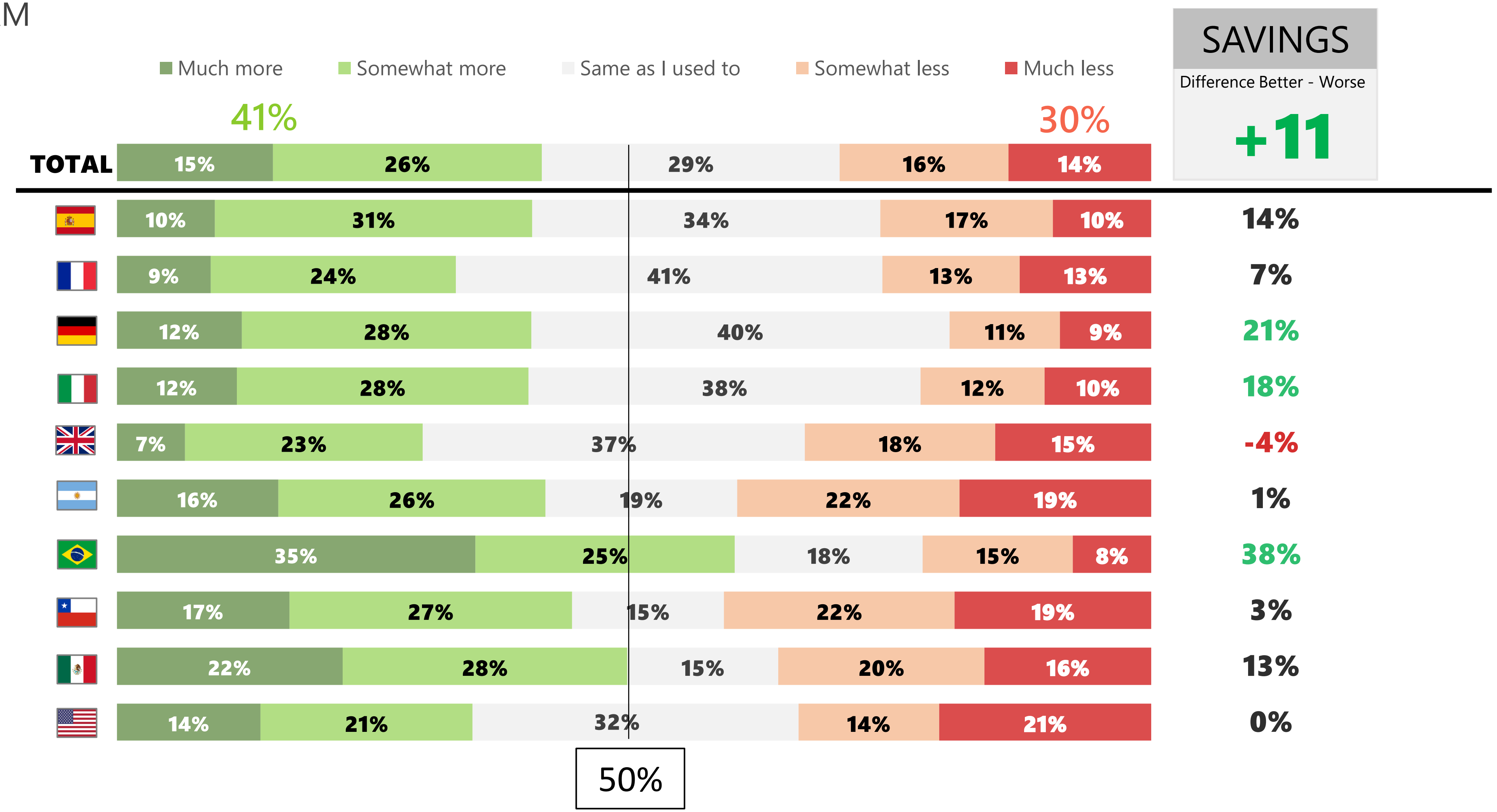
[46%] I have become thriftier

[38%] I am more nervous about getting into big investments

[% Totally+quite agree]

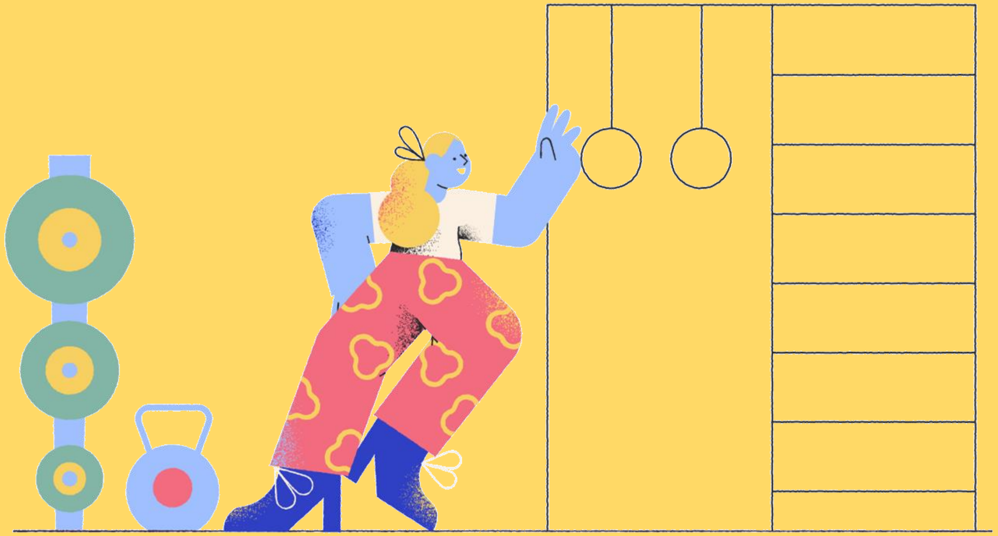
And for a part of society, there are savings awaiting

which might cause a kind of 'revenge spending' once Covid-19 restrictions are lifted.
Higher inequalities in LATAM



Total sample: 3.050 respondents
Question: Thinking about your income and your expenses since the beginning of the pandemic, are you saving....?

#3. Health worries us and occupies us



Health is one of our main concerns today

With high focus on mental health in Spain, UK and Brazil

	Top worries (1st+2nd+3rd place)											
1	**Covid-19/ pandemics**	36%	30%	**30%**	**39%**	24%	**33%**	27%	**56%**	**38%**	**48%**	**33%**
2	Economic crisis/inflation	**33%**	**31%**	24%	24%	**31%**	**33%**	**50%**	38%	34%	37%	29%
3	Poverty / economic inequalities	**26%**	21%	29%	24%	23%	23%	33%	41%	24%	28%	15%
4	Crime/violence/wars	**21%**	16%	23%	18%	16%	15%	32%	21%	25%	26%	21%
5	Climate change	**20%**	17%	24%	33%	24%	23%	15%	7%	18%	20%	22%
6	**Health diseases / cancer**	19%	30%	25%	21%	26%	26%	11%	14%	10%	16%	16%
7	**Mental health**	19%	25%	9%	13%	15%	26%	16%	26%	20%	17%	21%

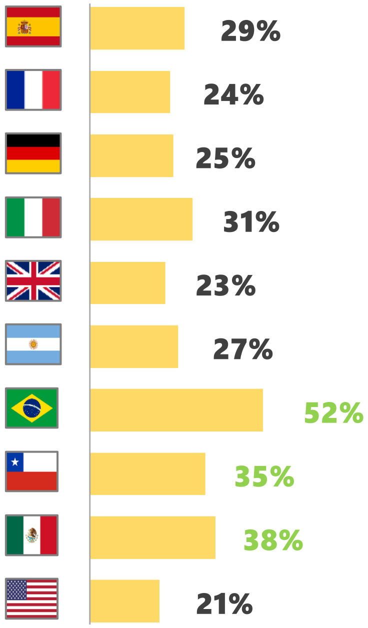
This has reinforced protective self-care

Healthier diet and more sport. Changes observed in most of the countries analyzed

Follow a healthy and balanced diet

Perceived variation:

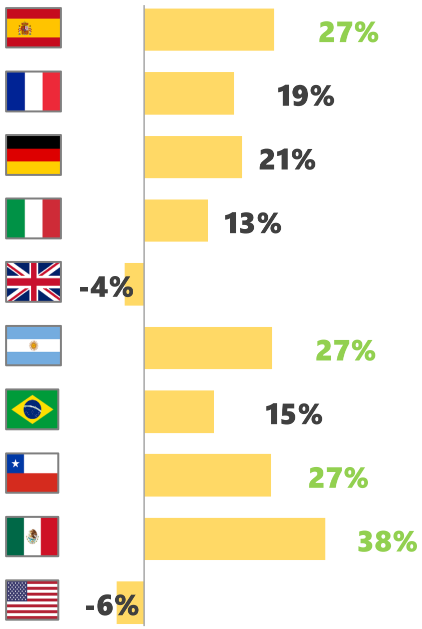
June 2020	December 2020	July 2021	February 2022
+24%	+28%	+32%	**+30%**



Doing sports

Perceived variation:

June 2020	December 2020	July 2021	February 2022
+8%	+15%	+10%	**+18%** ▲



Total sample: 3.050 respondents
Question: Do you think 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?

Variation vs previous measurement ▲▼

#4. Squeeze and savour life. Cherishing the present

We want to make up for lost time, we want to live...

even though 35% of us don't find it easy

I feel like doing things as soon as I can **[60%]**

I feel like making up for all the time lost **[53%]**

You have to squeeze life, live it to the fullest **[48%]**

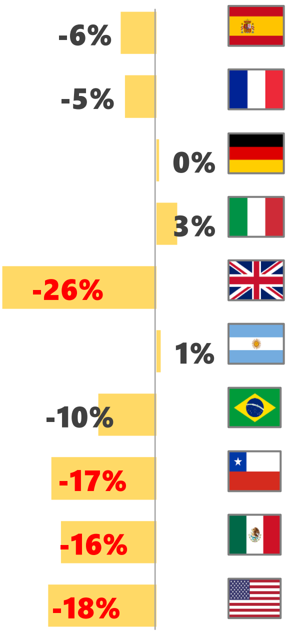
It's going to be hard to get back to routines **[35%]**

[% Totally+quite agree]

Outdoor recreation is returning to pre-pandemic levels.

Specially in Europe, as LATAM is still constraining this outdoor leisure

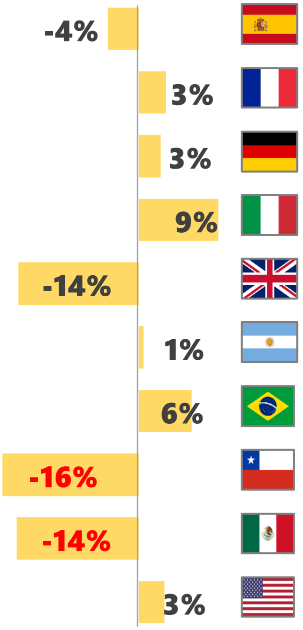
Going to bars or restaurants



Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
-	-20%	-16%	**-9%** ▲

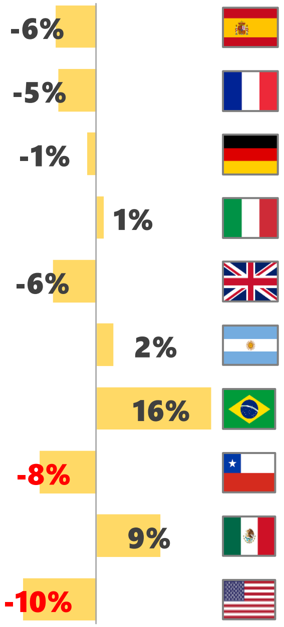
Purchase clothing and accessories



Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
-18%	-7%	-5%	**-2%** ▲

Going to the gym



Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
-10%	-5%	-9%	**-1%** ▲

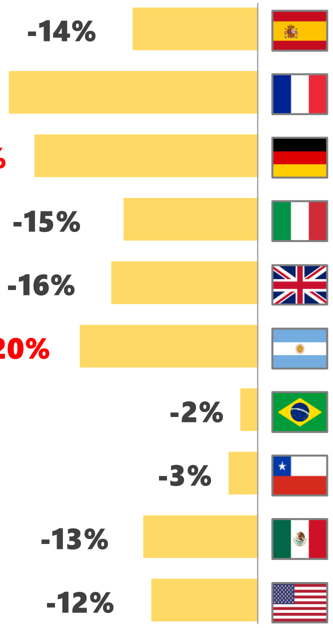
Total sample: 3.050 respondents
Question: Do you think that you will do less, about the same, or more of each of the following activities compared to the 12 months before COVID-19 started?

Variation vs previous measurement ▲▼

And a major boost to cultural activities is also observed

Although these have not yet fully recovered, they are progressively increasing their activity

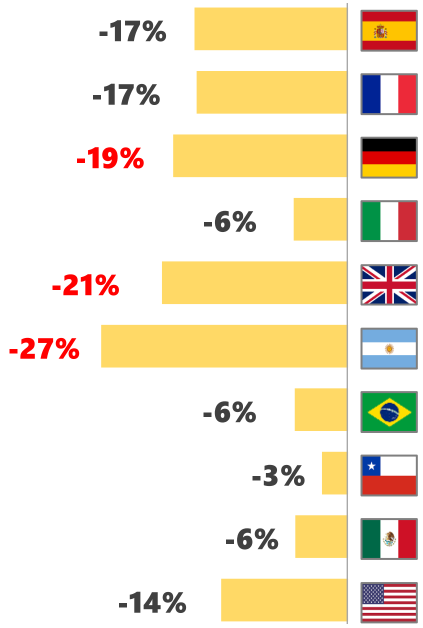
Going to festivals and concerts



Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
-22%	-17%	-24%	**-15%** ▲

Going to the cinema and theatre



Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
-22%	-17%	-24%	**-14%** ▲

Total sample: 3.050 respondents
Question: Do you think 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?

Variation vs previous measurement ▲▼

#5. Public is valued, but we focus on the self

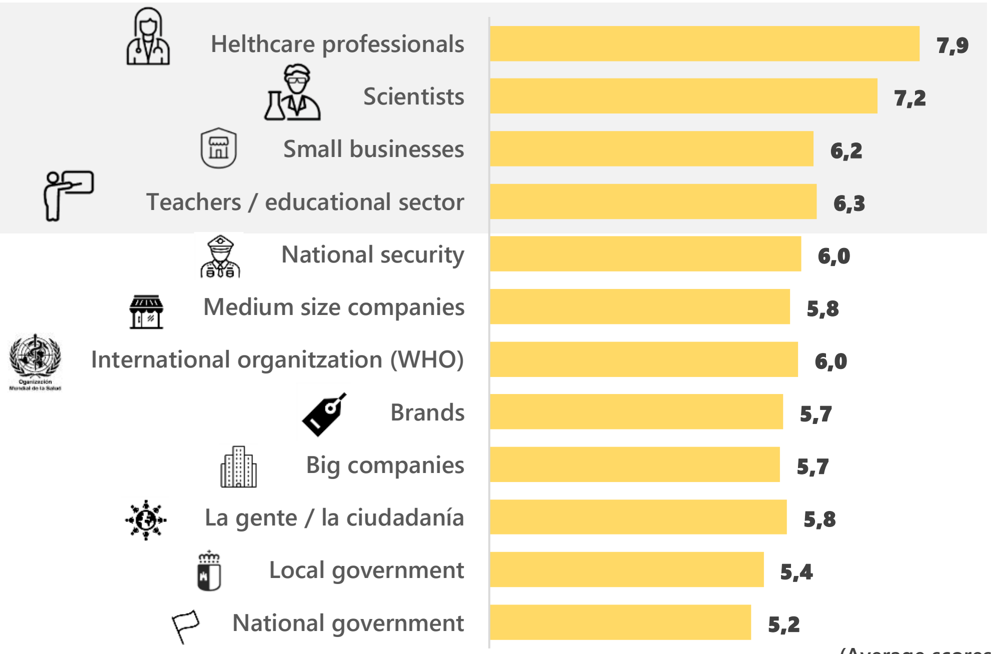
The public and the power of society is valued

And the effort made by some groups is highly valued (scientists, health professionals, teachers…), even above governments. In the most complicated moments, the solidarity of society emerges

[37%] I believe that the **public is more important than ever.** The Public has been revalued

[41%] I believe in the **power of society**. I have realized that society can change things

How is the management of the pandemic being assessed?



(Average scores)

[% Totally+quite agree]

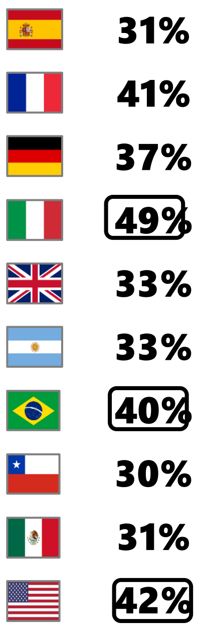
Total sample: 3.050 respondents
Question: On a scale of 1 to 10, how would you rate the response to and management of the pandemic of:

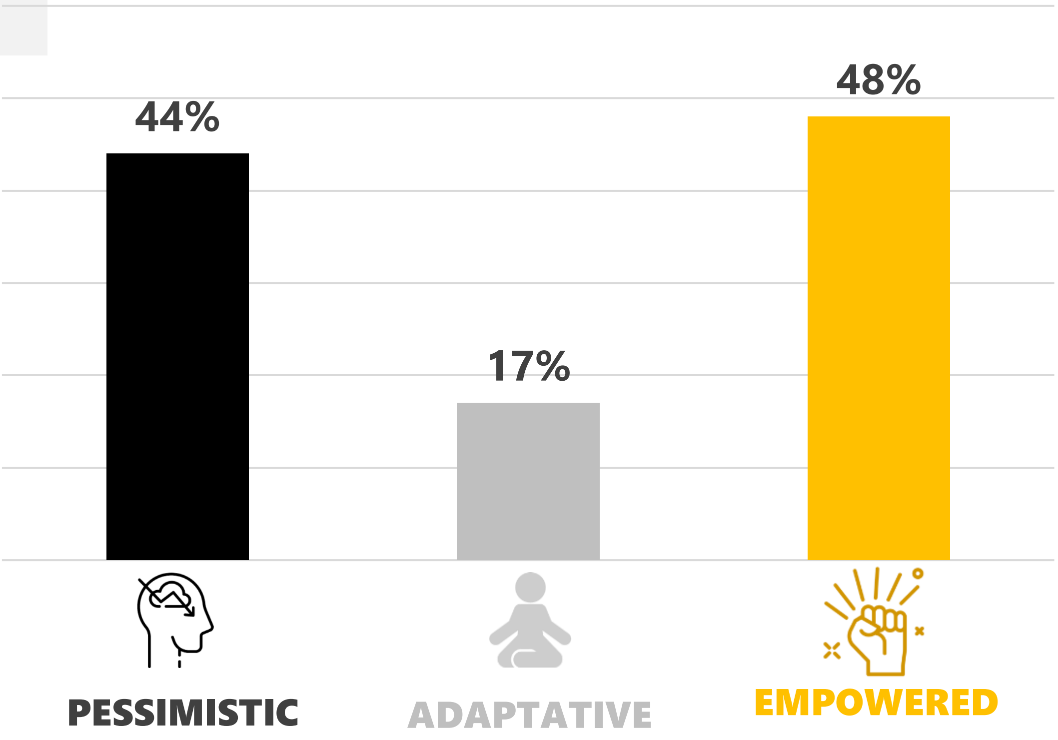
But there is also a parallel effect to this uncertainty: individualism is also growing.

Which can lead to 'closing in on oneself' (pessimistic) or in putting oneself one step ahead (empowered).

[37%]

I have become more individualistic; I look more for myself and for my own



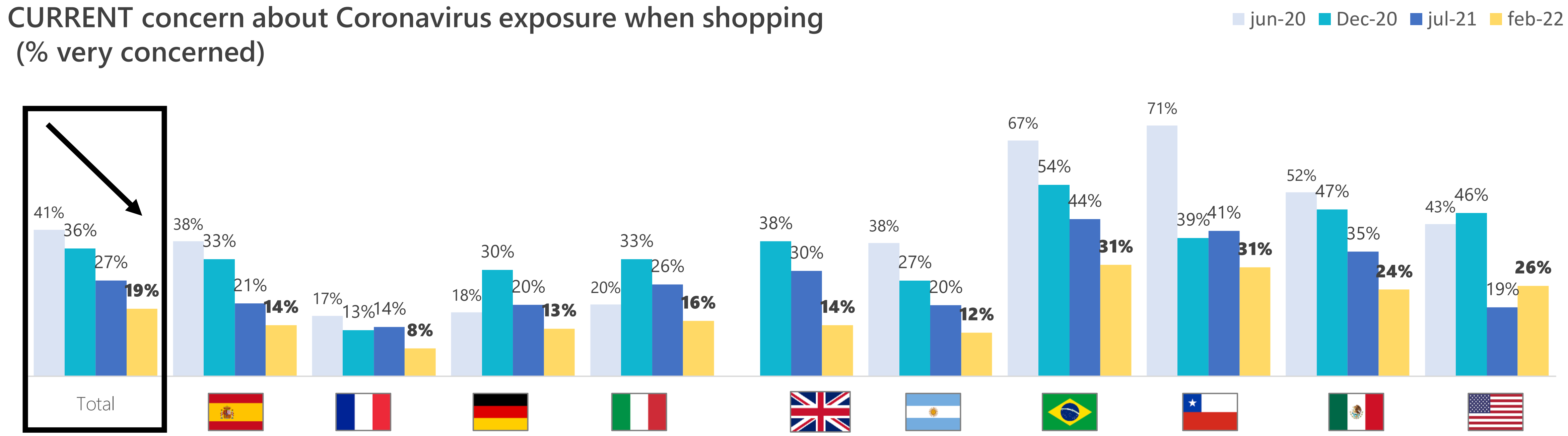


[% Totally+quite agree]

#6. Digital shopping: not out of security but out of desire

Concerns about COVID-19 exposure on purchases continue to fall

Even 1 out of 5 remains worried

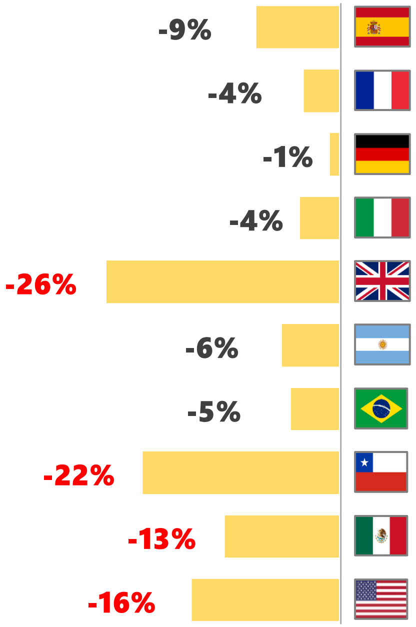


Total sample: 3.050 respondents
Question: Now, when you go to the grocery store, how would you rate their level of concern regarding the possibility of being exposed to the coronavirus? Are you....

This allows a gradual return to shopping centres, which is combined with the proximity shopping

A habit that has been boosted during the pandemic.

Do you expect to go to a shopping mall



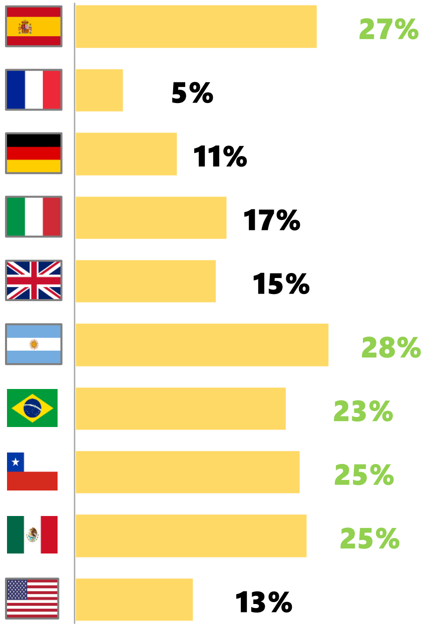
Perceived variation:

June 2020	December 2020	July 2021	February 2022
-26%	-21%	-23%	**-11%** ▲

Shopping in shops close to home, in the neighborhood

Perceived variation:

June 2020	December 2020	July 2021	February 2022
+5%	+19%	+21%	**+19%**



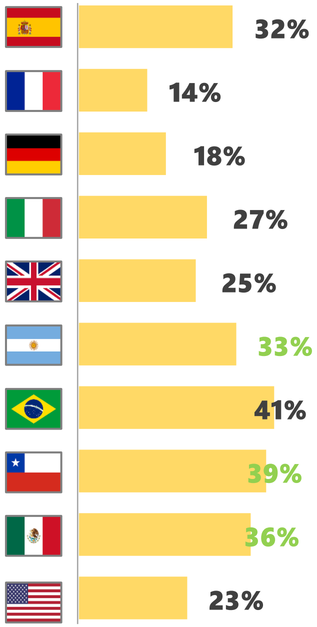
Total sample: 3.050 respondents
Question: Do you think that you will do less, about the same, or more of each of the following activities compared to the 12 months before COVID-19 started?

Variation vs previous measurement ▲▼

Nevertheless, the new discovered channels do not disappear

Online is confirmed as a growing option, and delivery, although down slightly from the last wave, still shows a greater presence than it did before the pandemic.

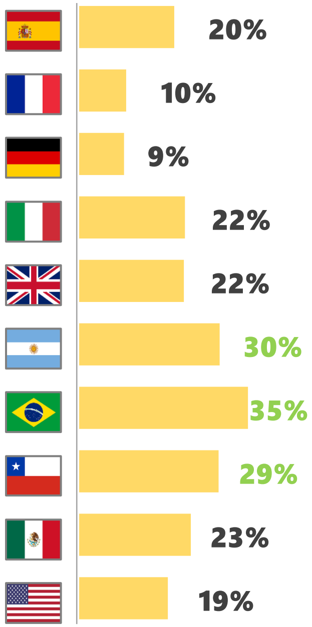
Buy products online



Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
+12%	+26%	+31%	**+39%** ▲

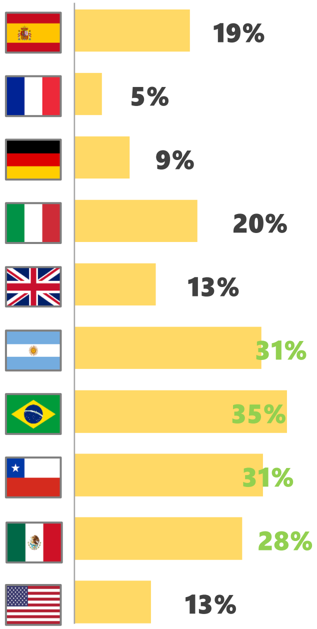
Buy food online



Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
+3%	+22%	+29%	**+22%** ▼

Have products/food delivered to my home



Perceived variation:

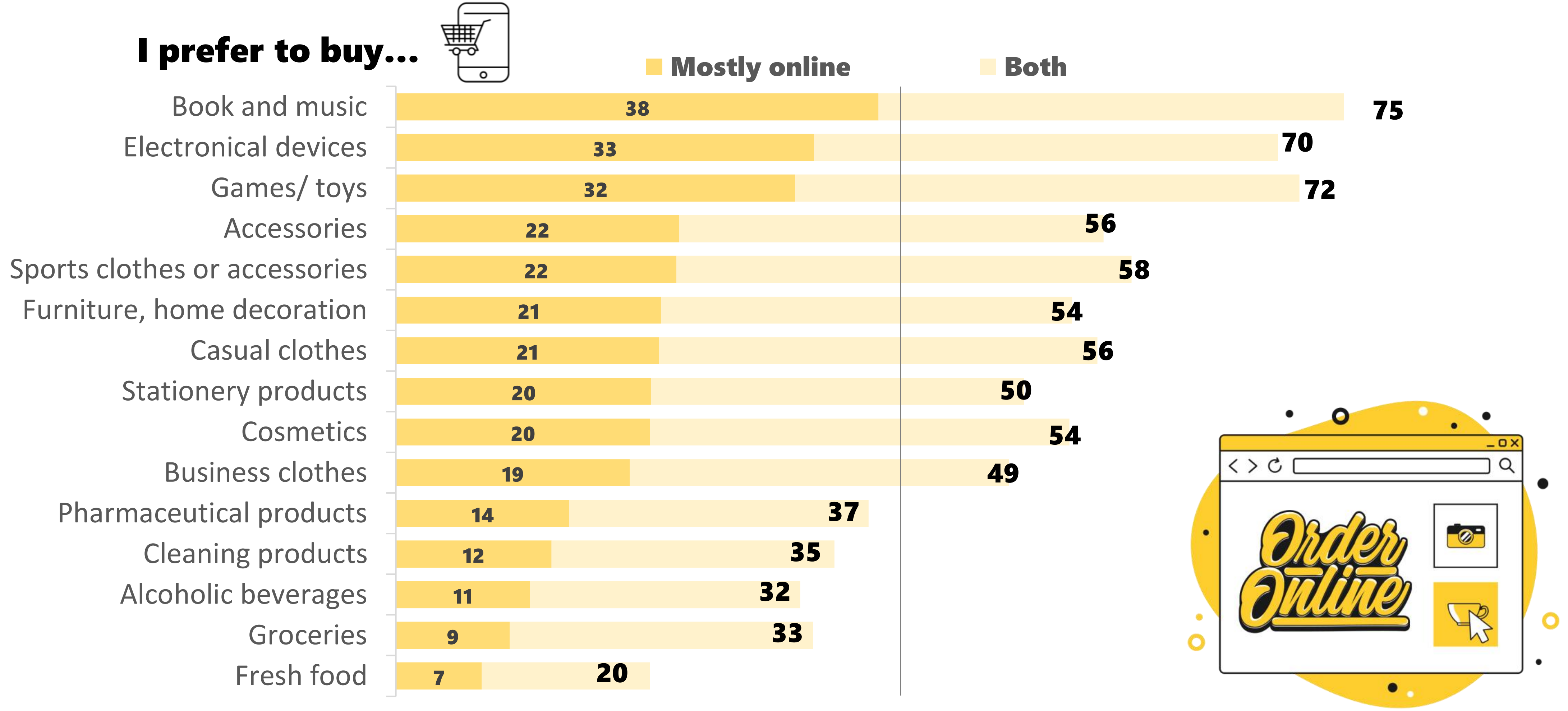
JUNE 2020	DEC 2020	JULY 2021	FEB 2022
0%	+22%	+27%	**+20%** ▼

Total sample: 3.050 respondents
Question: Do you think 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?

Variation vs previous measurement ▲▼

The online purchase is a reality in all the categories

even beating offline for books, electronical devices and toys



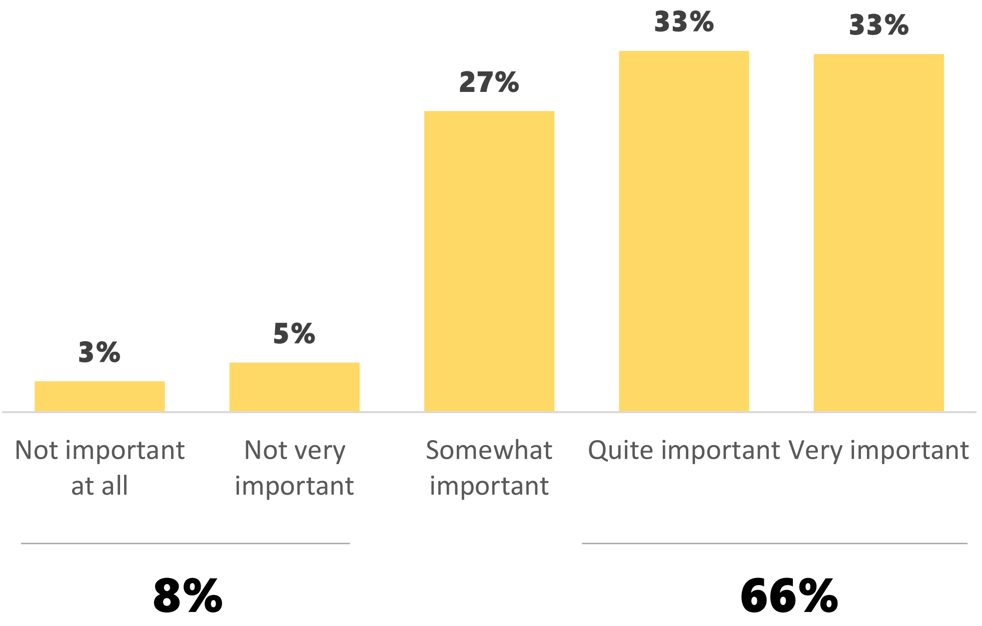
Total sample: 3.050 respondents
Question: How do you prefer to buy...?

#7. Sustainability under construction

Sustainability is important and the pandemic has reinforced it

66% says it is a very or fairly important aspect to consider before purchasing a product or service.
Greater relevance in Brazil, Mexico, Italy and France; Lower relevance in UK, United States, Germany and Spain.

Relevance of the sustainability in product & services consume

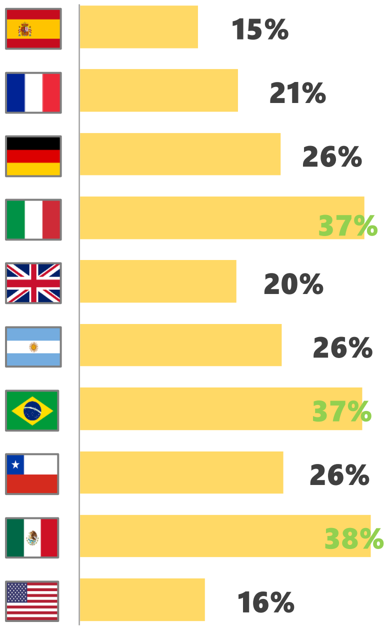


Because of pandemic...

Buy environmentally friendly products

Perceived variation:

June 2020	December 2020	July 2021	February 2022
+26%	+21%	+27%	**+26%**



Total sample: 3.050 respondents
Question: To what extent is sustainability important to you in the products and services you buy and consume?

And we are even willing to pay a little more in some categories

Will to pay a little more for sustainable products in…

(% Surely + Probably yes)

Fresh food	66%
Groceries	64%
Cleaning products	57%
Pharmaceutical products	54%
Electronical devices	50%
Cosmetics	47%
Casual clothes	45%
Sports	43%
Furniture	43%
Stationery	43%
Business clothes	40%
Games / Toys	39%

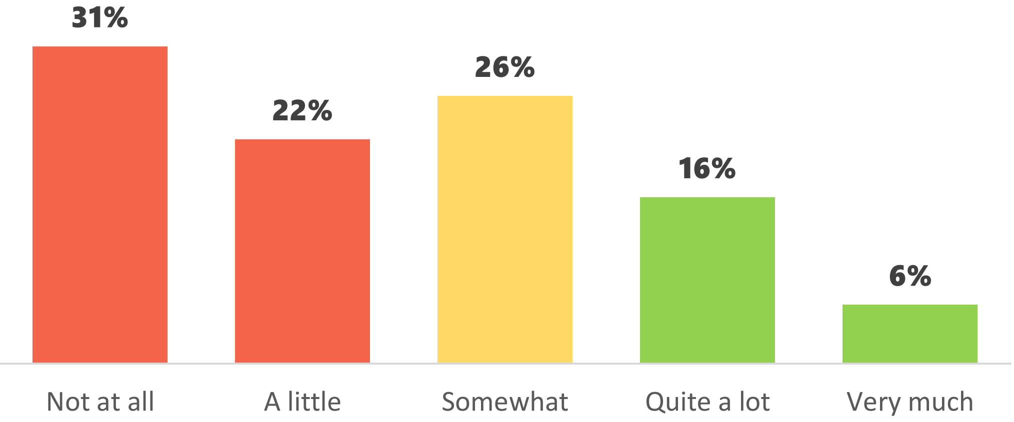
Total sample: 3.050 respondents
Question: Would you be willing to pay a little more for a brand that was more sustainable in each of the following categories?

But there are still many unclear or unfamiliar concepts surrounding sustainability

In this sense, great unawareness of SDGs across countries, and a total unknowledge in USA or UK

UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS

Are you familiar with them?



53%

22%

(% Quite + Very much)

32%
26%
24%
23%
23%
22%
20%
19%
16%
13%

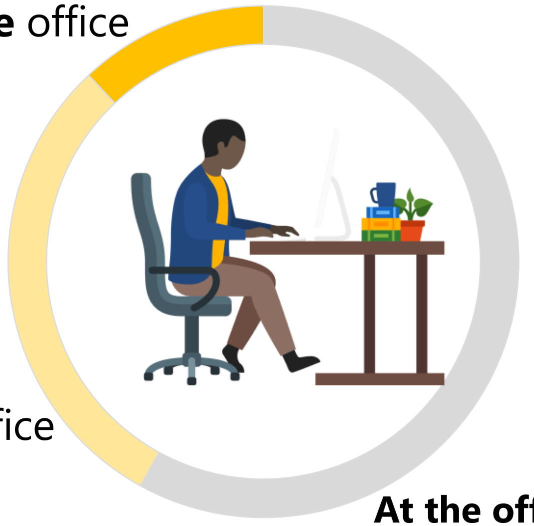
Total sample: 3.050 respondents
Question: To what extent are you familiar with the SDGs?

#8. Work revolution. New models of work

When the future, flexibility and the hybrid format are expected to continue, although face-to-face attendance remains high.

Higher expected presence in LATAM

...when pandemic situation ends



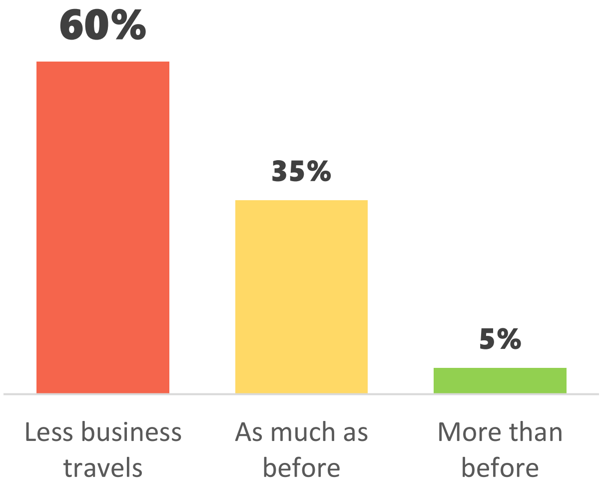
	TOTAL										
HOME OFFICE	**42%**	33%	34%	42%	38%	40%	**48%**	**54%**	**48%**	**48%**	33%
Partly	30%	25%	25%	32%	27%	25%	**33%**	**38%**	**34%**	**39%**	18%
All the time	12%	8%	9%	11%	11%	15%	15%	16%	14%	9%	16%

Total sample: 3.050 respondents
Question: Are you working in home-office during this pandemic of COVID 19 in comparison to the time before the pandemic? / If you think about the time when the pandemic has become endemic or disappeared? Do you expect to work...

The home office affects also business trips that have been dramatically reduced

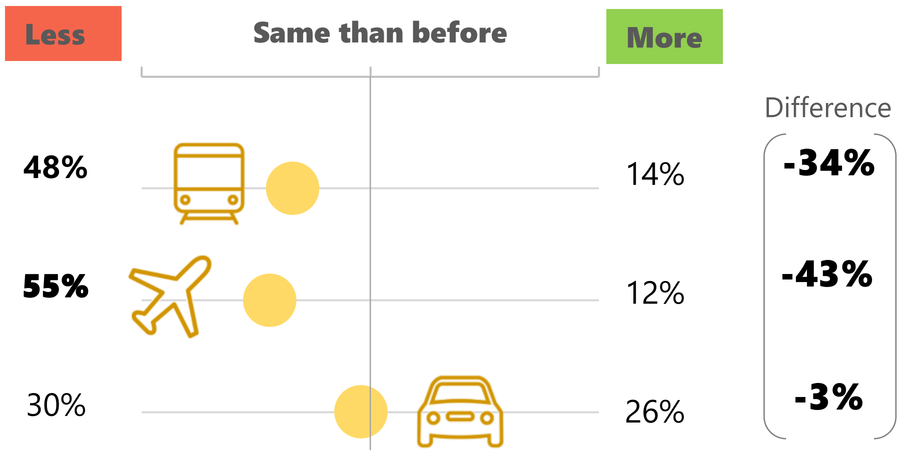
As 60% expects to travel less, and only car trips will reach previous traffic levels.

Business travel expectations for 2020



Base: Business travellers

Expectations for 2022 by travel mode



Base: Travel mode users

Means of transport used in comparison to pre pandemic

	-34%	-44%	12%
	-16%	-35%	-1%
	-38%	-33%	-4%
	-24%	-39%	-26%
	-29%	-36%	3%
	-56%	-50%	-20%
	-45%	-61%	-3%
	-39%	-45%	-2%
	-55%	-54%	-1%
	6%	-54%	13%
	-34%	**-43%**	**-3%**

*Difference between less used and more used

Total sample: 3.050 respondents
Question: Before the pandemic of COVID 19 did you have to do any business travel? / Comparing the time before the pandemic of COVID 19 with the situation now at the beginning of 2022 are you doing.... / And how do you travel for business reasons comparing the time before the pandemic of COVID 19 with the situation now at the beginning of 2022?

Home office improves work-life balance and flexibility, but can also lead to "disaffection and emotional disengagement"

For some, work is no longer a simple trade of salary for labor. It is now one of many elements in the balance

More than 50Million* Americans quit their job in 2021

* Source: U.S. Bureau of Labor Statistics

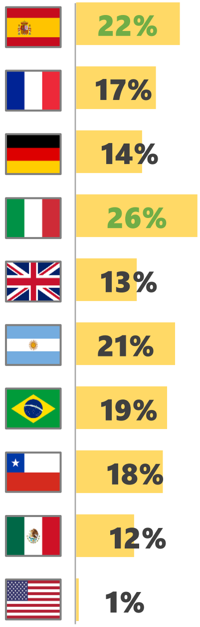
The phenomenon called the **GREAT RESIGNATION** has not yet spread to other countries, but is something to be aware of

#9. A mobility that is still km0... but that looks far ahead.

Mobility becomes sustainable because safety is sought after

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



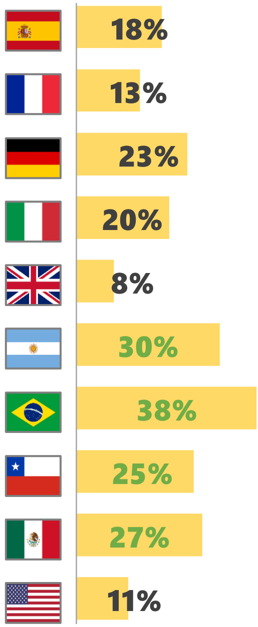
Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
+8%	+17%	+13%	+16% ▲

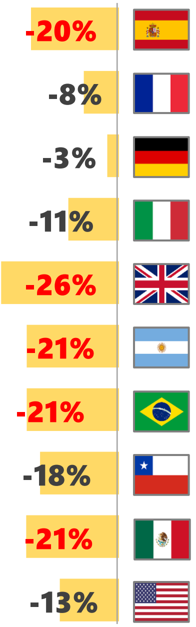
Use my own vehicle

Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
+13%	+19%	+20%	+21%



Use public transportation



Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
+26%	-23%	-26%	-16% ▲

Total sample: 3.050 respondents
Question: Do you think 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?

Variation vs previous measurement ▲▼

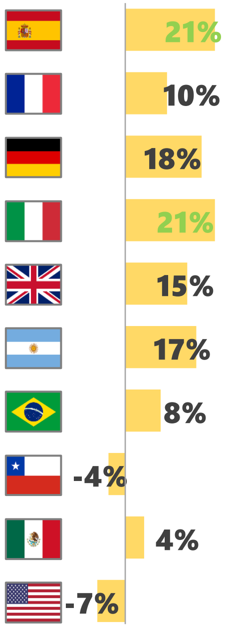
Travel, for the time being, remains domestic

but the trend shows that we are progressively reducing our fears of flying and of leaving the country.

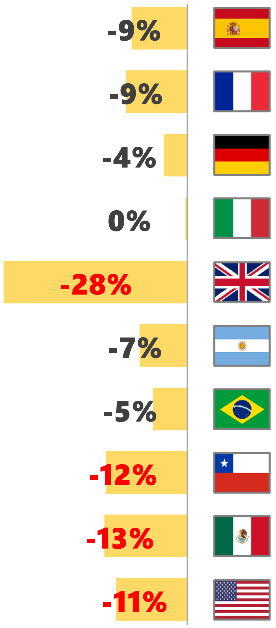
Travelling within the country

Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
-3%	0%	0%	+10% ▲



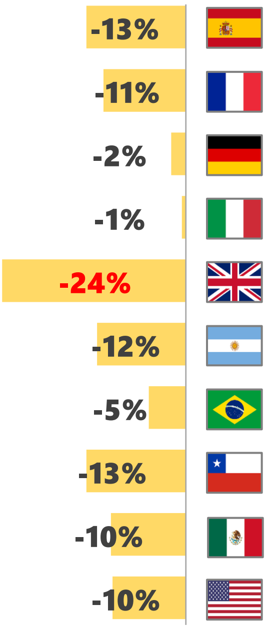
Travelling by plane



Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
-16%	-15%	-19%	-10% ▲

Travelling abroad

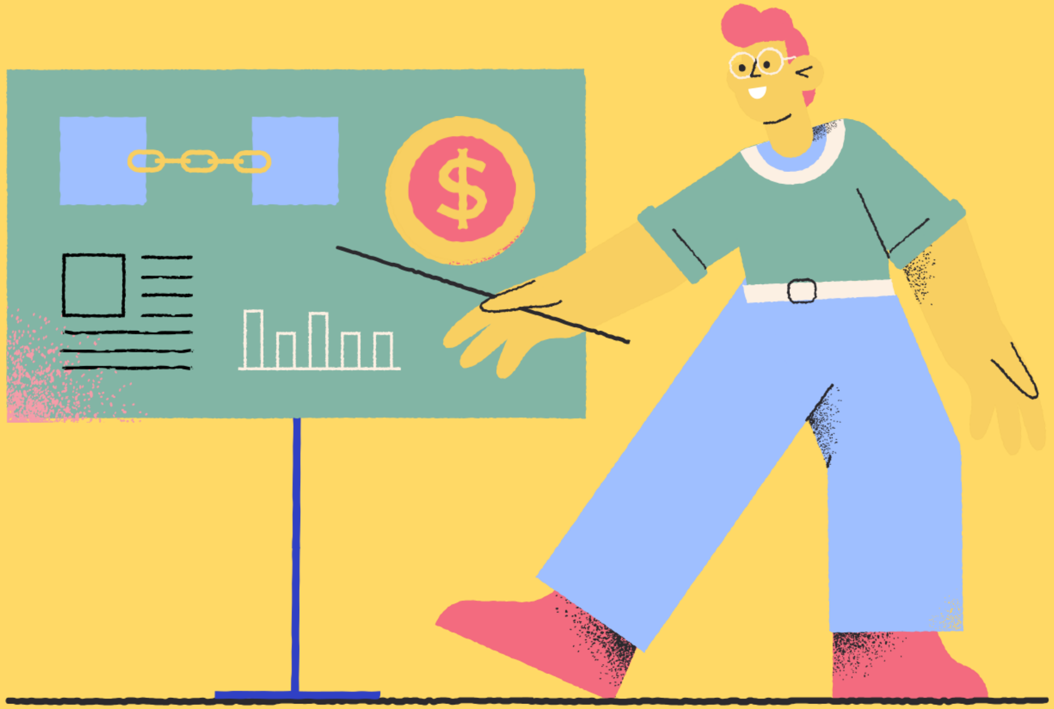


Perceived variation:

JUNE 2020	DEC 2020	JULY 2021	FEB 2022
-15%	-14%	-20%	-10% ▲

Total sample: 3.050 respondents
Question: Do you think 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?

Variation vs previous measurement ▲▼

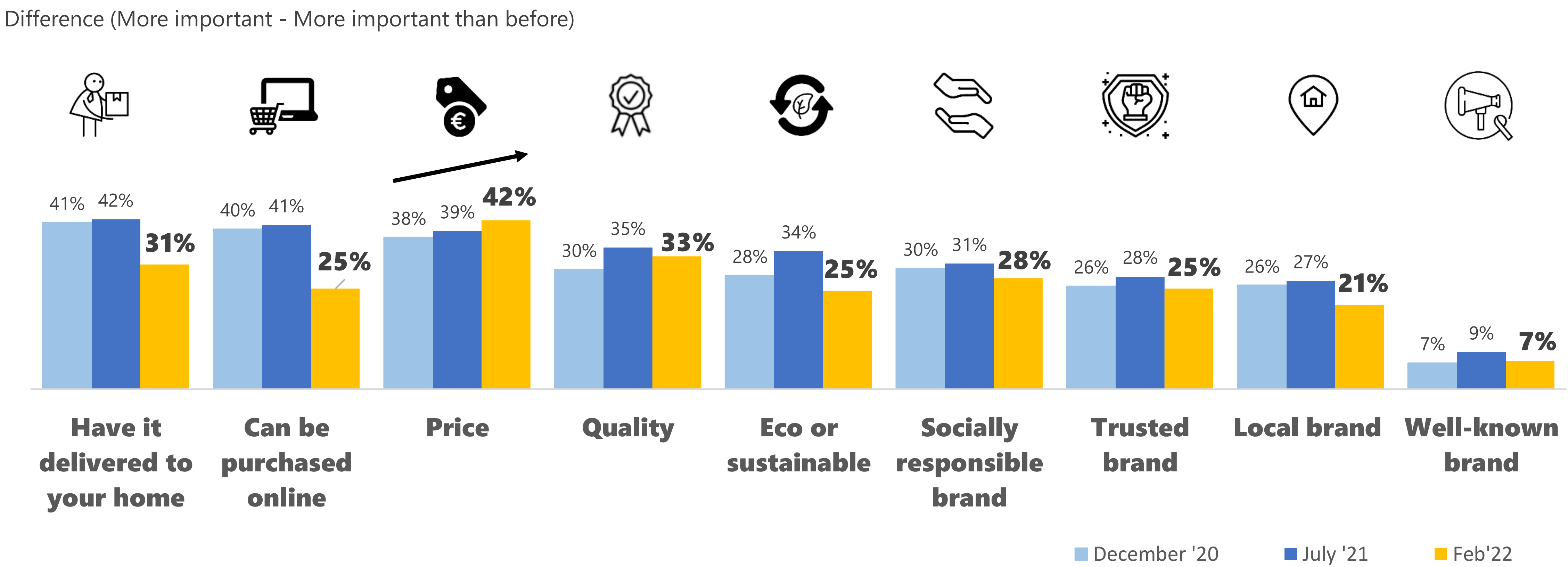


#10. If the economy is uncertain, don't forget the price

Punto de Fuga

Drivers are changing... again

Price is an increasingly relevant factor, while other aspects (such as delivery or the possibility to buy online), which were paramount in the pandemic, are no longer so decisive.



Total sample: 3.050 respondents
Question: 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?

Key learnings

Key learnings

After 2 years of pandemic, society has adapted to a new frame of reference, it has mutated. With uncertainty at the epicentre of our lives, long-term plans have no place, and instead we try to live the present, and come to terms with reality. A reality conditioned not only by pandemic developments, but also by the various social, geopolitical and economic phenomena we are experiencing.

The TRANS PANDEMIC SOCIETY is a society
... living with uncertainty and fear of the future
... with widening divides
... emotionally more unstable
... seeking refuge in present enjoyment
... supportive in times of need, but individualistic in everyday life.

In this new frame of reference, different trends are crystallising:

- re-evaluation of the **home** and the need to be with our loved ones.
- concern for health that promotes **healthy** habits.
- desire to live in the **present** as a refuge from future uncertainty.
- consolidation of **digital** shopping, which coexists with face-to-face shopping.
- search for **sustainability**, albeit still with gaps
- **labour** revolution still to be built, which maintains hybrid teleworking.
- **mobility** is still limited and km0, but awaiting its return.
- reordering of drivers in purchasing, with an increasing importance of **price**.

And what should the role of brands be?

In the face of…

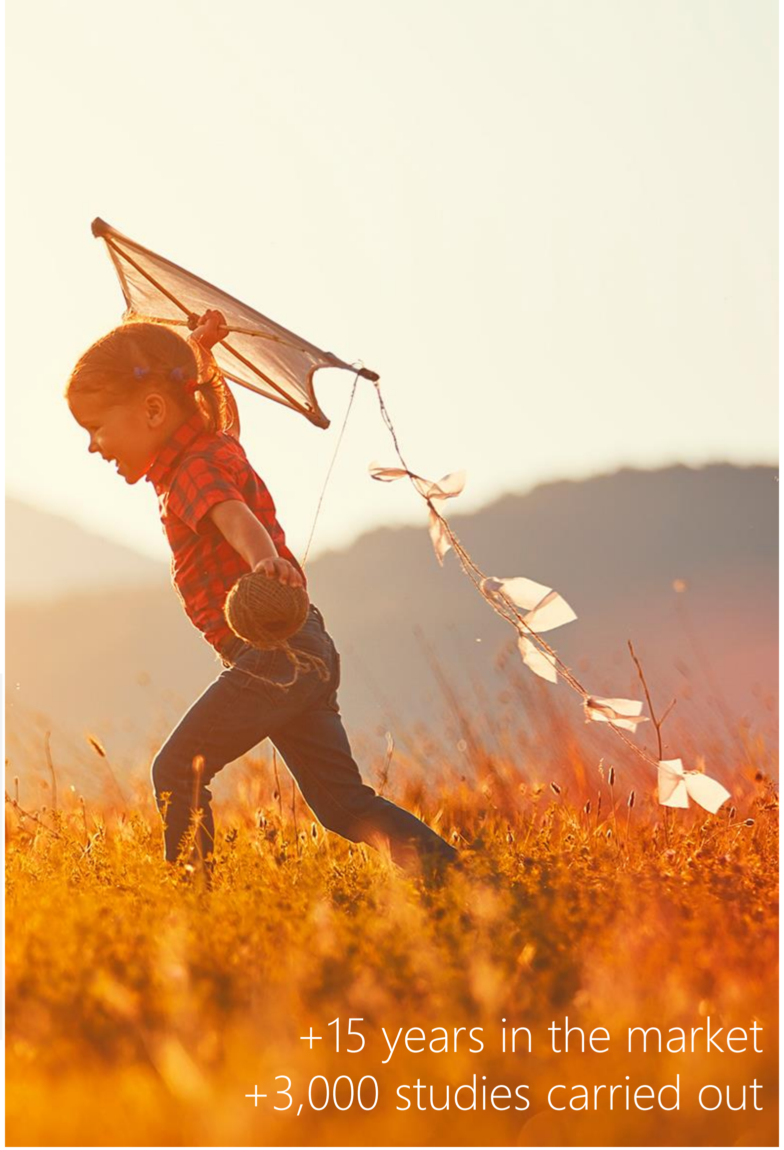
… an uncertain future	SECURITY
… a complex world	CLARITY
… emotional fragility	EMPATHY
… the need to squeeze the present	ENJOYMENT
… growing inequality	COMMITMENT

Punto de Fuga

We are a **quantitative and qualitative** research institute

Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

Research based on a deep knowledge of **PEOPLE**, to provide **INSIGHTS** that add **VALUE** to brands.



Experts in society, experts in psycho-social studies

The New Paradigm
Society, Family and the Individual

The thousand and one families
X-ray of Spanish families

GO to senior
Serious targeting

From the new reality to normality
(4 waves)
Post-Covid experiences and expectations

Values
Consumption and communication

Women
Talk to them

Men in change
The new masculinity

Generation Awake
The keys to the eco-consumer

The future is written with Z
Keys to connect with the Generation Z

Flipshide Shopping
Impact on shopper behaviour

We incorporate this knowledge in all our projects

NATIONAL AND INTERNATIONAL

Punto de Fuga

Punto de Fuga is part of the international ARTIS NETWORK

THANKS

Laura.Torrebadell@puntodefuga.es
Ramon.Jordana@puntodefuga.es
Julia.sistero@puntodefuga.es

Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

ARTIS
the result network

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