



RECALCULANDO...

LA VIDA DESPUÉS DEL CONFINAMIENTO Una mirada a China

PRESENTADO POR:

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Javier Carrera, Chief Client Officer de Ipsos Perú

Juan Gabriel Herrera, UU Head de Ipsos Perú

GAME CHANGERS



AGENDA

Recalculando... la vida después del confinamiento

UNA REAPERTURA (IN)SEGURA

Javier Carrera, Chief Client Officer, Ipsos Perú

UNA MIRADA A CHINA

Alick Zhou, President & Chief Client Officer, Ipsos China

PERÚ

Juan Gabriel Herrera, Understanding Unlimited Head, Ipsos Perú

Q&A

UNA REAPERTURA (IN)SEGURA

1

Javier Carrera
Chief Client Officer
Ipsos Perú

Después del confinamiento...



Los riesgos son altos para una reapertura (in)segura...

3 de 4 consumidores retrasarán el retorno al shopping cuando se levanten las restricciones

61% mencionó el “miedo a enfermarse” como la principal razón para retrasar el retorno

1 de 4 consumidores están dispuestos a pagar más al comprar productos en tiendas que brindan una experiencia ‘segura’ al cliente



de los shoppers
dejarían de comprar en
una tienda si creen que
no toman en serio la
salud y seguridad de
sus clientes

¿Qué es lo más importante para los consumidores?



**Empleados
con
mascarillas**



**Empleados
con guantes**



**Desinfectante
en gel
disponible al
ingreso /
baños**



**Toallitas
desinfectantes
disponibles**



**Marcadores de
distanciamiento
social fuera de
la tienda**

Fuente: Syndicated Health & Safety Index (Ipsos USA, 2020)

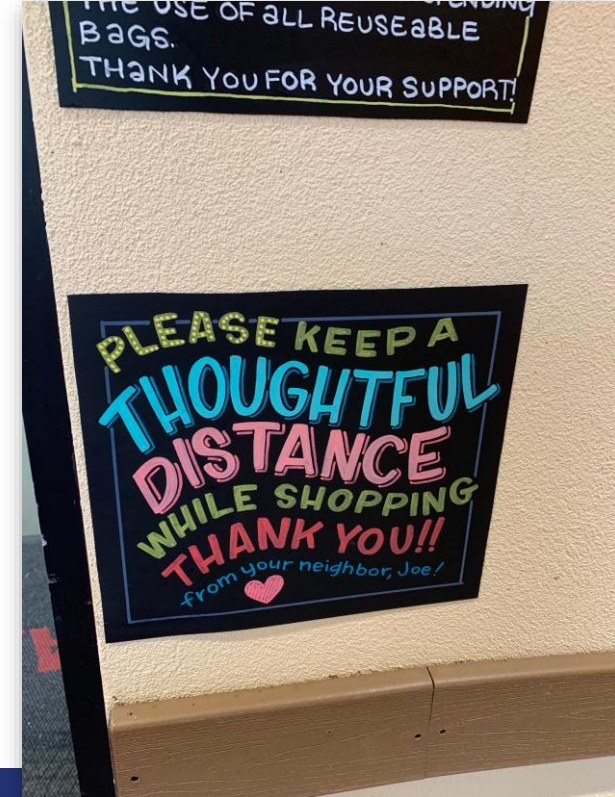
Lo que encontramos... lo bueno



Estaciones para
desinfección de
manos y carritos



Marcadores de
distanciamiento
social



Clara señalización de
distanciamiento social

Lo que encontramos... lo malo y lo feo



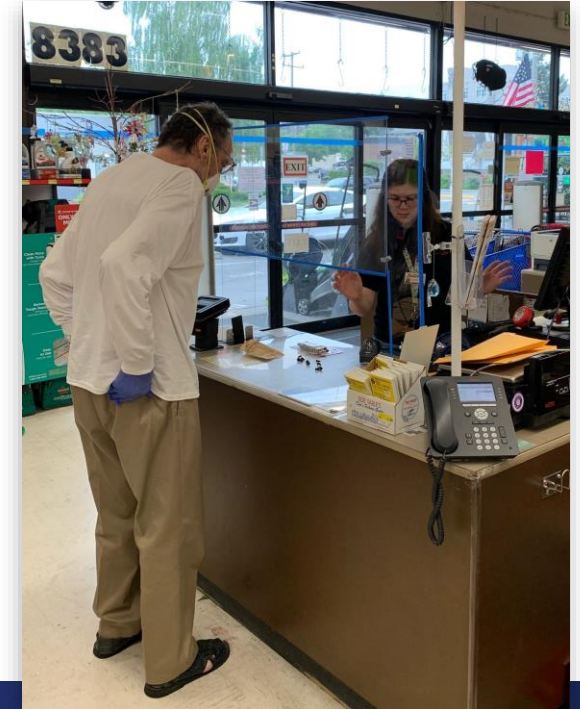
Señalización
inexistente



Estándares
inconsistentes
en el uso de
mascarillas



Señales mixtas
al realizar el
checkout



Clientes con
guantes y
mascarillas:
staff sin EPP



Aprendizajes clave

1

El cumplimiento fue variado, con mejor desempeño de las marcas líderes

2

La mayoría de las marcas no brindaron facilidades para lavar o desinfectar las manos

3

La mayoría de las marcas no controlaron el aforo ni realizaron limpieza visible

EL ESTALLIDO DE LA PANDEMIA Y LAS
CONSECUENTES NORMAS DE AISLAMIENTO Y
DISTANCIAMIENTO SOCIAL HAN IMPULSADO UN
CAMBIO EN LOS HÁBITOS DE LOS PERUANOS...

58%

Cambiará sus
costumbres de manera
permanente después
de la cuarentena

Fuente: El Peruano Post-Cuarentena (Ipsos, Abril 2020)

AL CONCLUIR LA CUARENTENA, EMOCIONES COMO EL **MIEDO Y NERVIOSISMO** SEGUIRÁN AFECTANDO LOS HÁBITOS Y PREFERENCIAS DE LOS PERUANOS, E INFLUENCIARÁN EL **PROCESO DE TOMA DE DECISIONES**

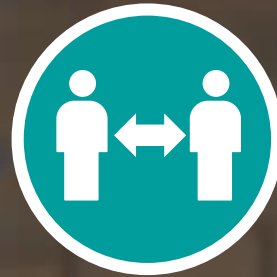
Consideraciones clave para que los peruanos consideren asistir a espacios públicos:



**Tener altos
estándares
de limpieza**



**Tener
dispensadores
de gel y jabón**



**Reducir el aforo
permitido /
Medidas de
distanciamiento
social**



**Brindar
mascarillas y
guantes**

Fuente: El Peruano Post-Cuarentena (Ipsos, Abril 2020)

AUDITORÍAS COVID-19

Evaluar el cumplimiento de protocolos de seguridad, higiene y distanciamiento social en canales modernos y tradicionales

PROTOCOLOS EVALUADOS

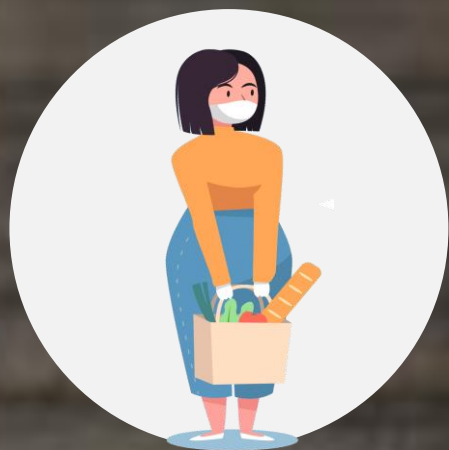
MEDIDAS DE SEGURIDAD AL INGRESAR AL ESTABLECIMIENTO

- Control de uso de mascarillas de los clientes
- Control de la temperatura
- Ofrecimiento de alcohol en gel / antibacterial previo al ingreso
- Medidas de distanciamiento social

MEDIDAS DE SEGURIDAD AL INTERIOR DEL ESTABLECIMIENTO

- Uso correcto de la mascarilla del personal
- Uso de guantes del personal
- Medidas de distanciamiento social entre colaboradores
- Material de desinfección disponible
- Depósitos de basura plenamente identificables
- Medidas de distanciamiento social para clientes

¿CUÁL FUE EL CUMPLIMIENTO DE PROTOCOLOS DE SEGURIDAD, HIGIENE Y DISTANCIAMIENTO SOCIAL?

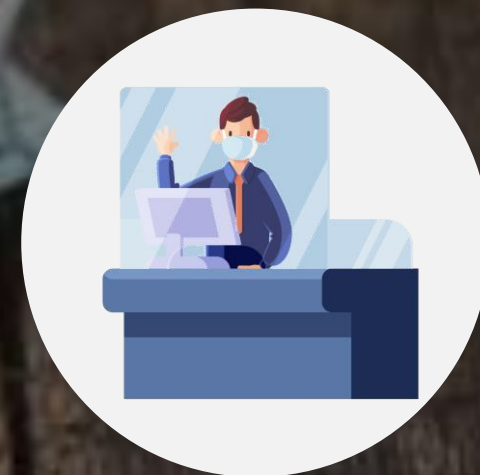


Al ingreso del establecimiento

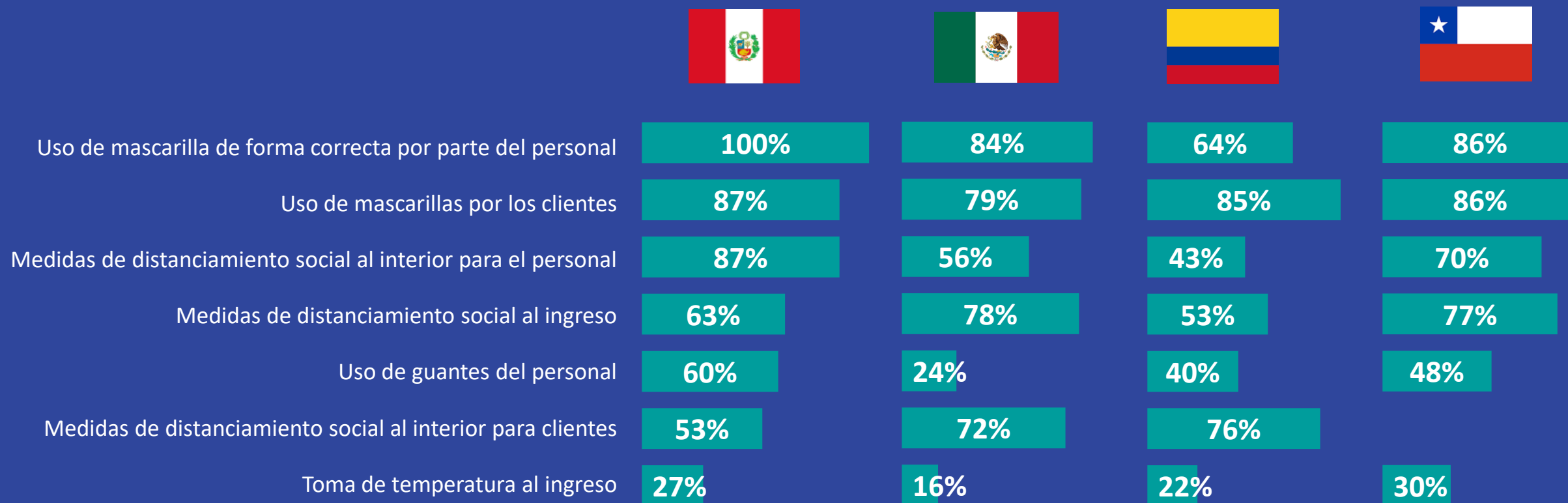
- ✓ USO DE MASCARILLA EN LOS CLIENTES 87%
- ✓ MEDIDAS DE DISTANCIAMIENTO SOCIAL 63%
- ✓ OFRECIMIENTO DE GEL ANTIBACTERIAL 45%
- ✓ CONTROL DE TOMA DE TEMPERATURA 27%

Al interior del establecimiento

- ✓ CORRECTO USO DE LA MASCARILLA EN EL PERSONAL 100%
- ✓ DISTANCIAMIENTO SOCIAL PARA COLABORADORES 87%
- ✓ DEPÓSITOS DE BASURA PLENAMENTE IDENTIFICABLES 70%
- ✓ USO DE GUANTES EN EL PERSONAL 60%
- ✓ GEL ANTIBACTERIAL DISPONIBLE 60%
- ✓ DISTANCIAMIENTO SOCIAL PARA CLIENTES 53%



¿CÓMO ESTAMOS EN COMPARACIÓN CON OTROS PAÍSES DE LA REGIÓN?



Perú: 60 evaluaciones en Supermercados, Bancos, Farmacias, Tiendas de Conveniencia, Bodegas y Mercados

México: 68 evaluaciones en Supermercados, Bancos, Farmacias, Tiendas de Conveniencia y Mejoramiento del Hogar

Colombia: 67 evaluaciones en Supermercados, Bancos, Farmacias, Centros Comerciales, Tiendas de Mejoramiento del Hogar y Telecomunicaciones

Chile: 70 evaluaciones en Supermercados, Bancos, Tiendas de Mejoramiento del Hogar y Telecomunicaciones

LA REAPERTURA REQUIERE UNA EXPERIENCIA SEGURA EN LAS TIENDAS

Las marcas con tiendas y agencias físicas deben implementar protocolos para crear **ambientes en tienda seguros** en los que clientes y empleados puedan interactuar **libres de preocupaciones**.

Para controlar temas críticos como aforo, distanciamiento social y medidas sanitarias, las marcas deben **verificar el cumplimiento de los protocolos** para corregir cualquier incumplimiento en los puntos de contacto claves que pueden destruir la confianza y lealtad de los consumidores.

EN RESUMEN...

- La Organización Mundial de la Salud ha declarado a Latinoamérica como el nuevo foco de la pandemia global.
- Al finalizar las medidas de confinamiento y la reactivación progresiva de la actividad económica, los latinoamericanos estamos abrumados por sentimientos de ansiedad y preocupación por los riesgos de contagio y la caída en el ingreso de las familias.
- La reapertura de las tiendas y negocios requiere que las marcas implementen protocolos para crear ambientes seguros para clientes y empleados.
- Las marcas deben verificar el cumplimiento de protocolos en temas clave, como aforo, distanciamiento social y medidas sanitarias.



HOW TO PROTECT CONSUMERS' SENSE OF SECURITY?

Unlock business opportunities in the post-epidemic period

Ipsos China

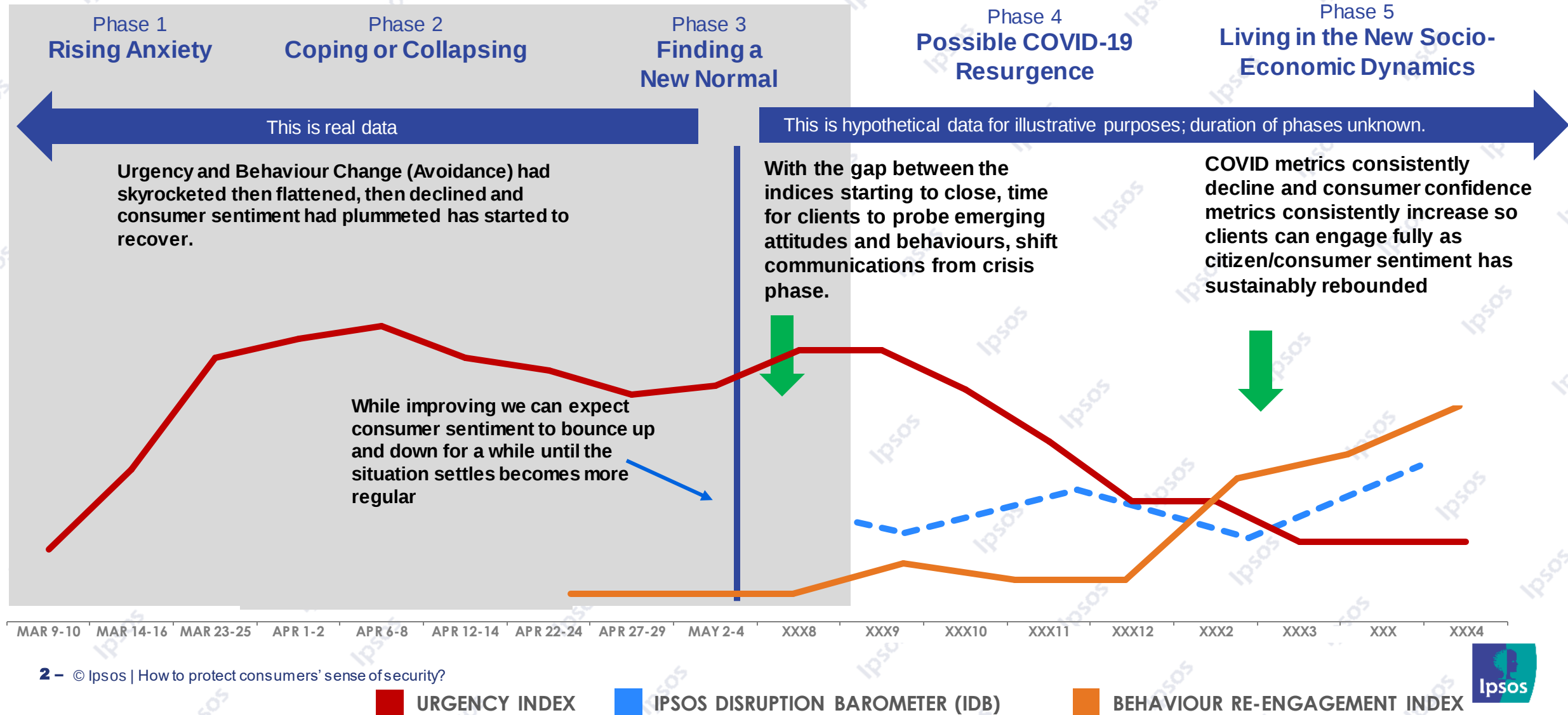
3 June, 2020

GAME CHANGERS



THE PUBLIC'S ANXIETY AND SENSE OF URGENCY CAUSED BY COVID-19 ULTIMATELY LEADS TO LASTING CHANGES IN CONSUMER BEHAVIOR.

Only capitalizing on the trend of such circumstances, can enterprises effectively cope with the "new normal".



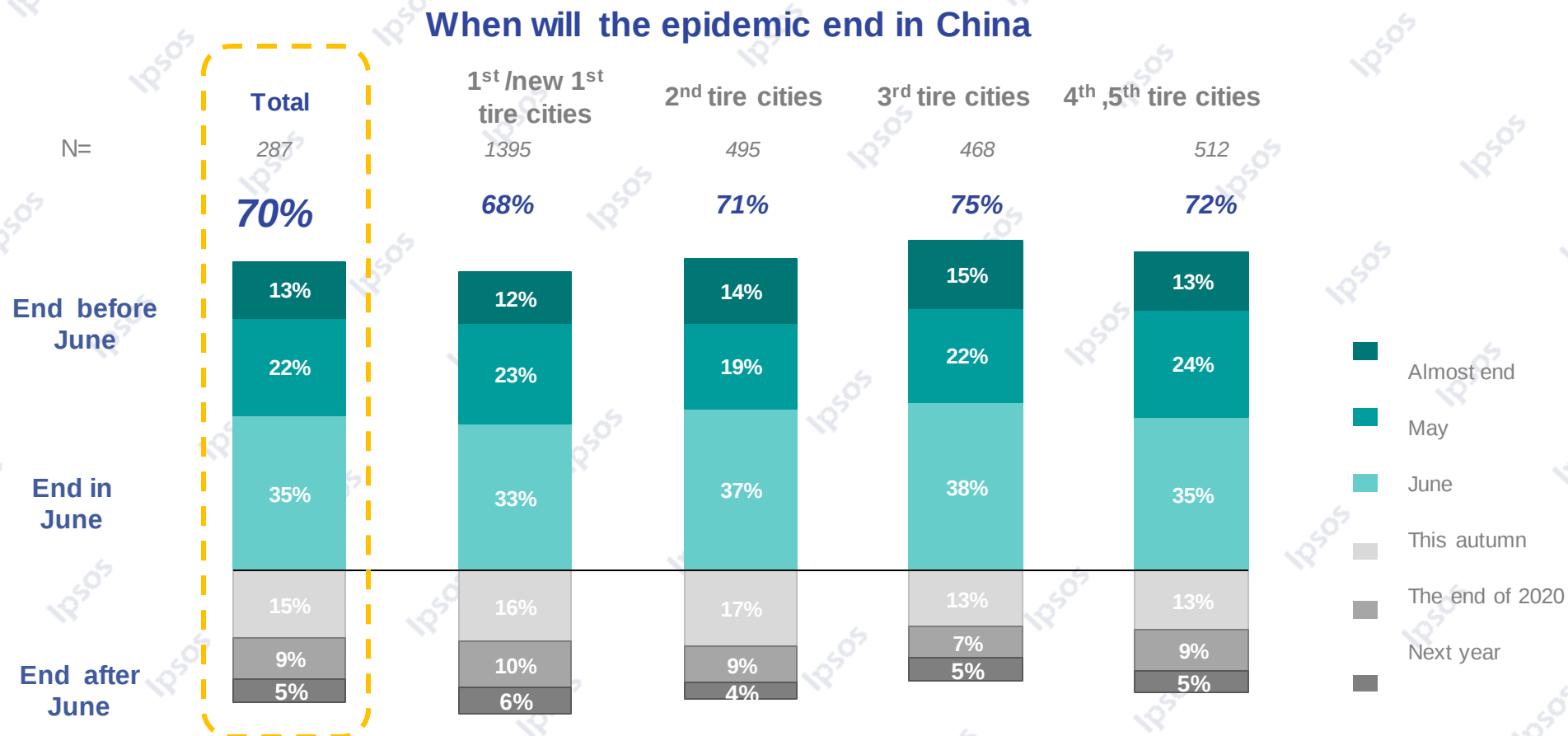
70% OF PEOPLE THINK COVID-19 IN CHINA WILL END BY JUNE. PUBLICS IN THE 3RD ,4TH ,5TH TIER CITIES HAVE GREATER CONFIDENCE IN EARLY ENDING OF THE EPIDEMIC

47%

2020 Feb.
Fear that outbreak will be difficult to control in the short term

70%

2020 Apr.
Believe the epidemic will be over by June or even earlier



*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times - Wave 2, Research period: April 2020

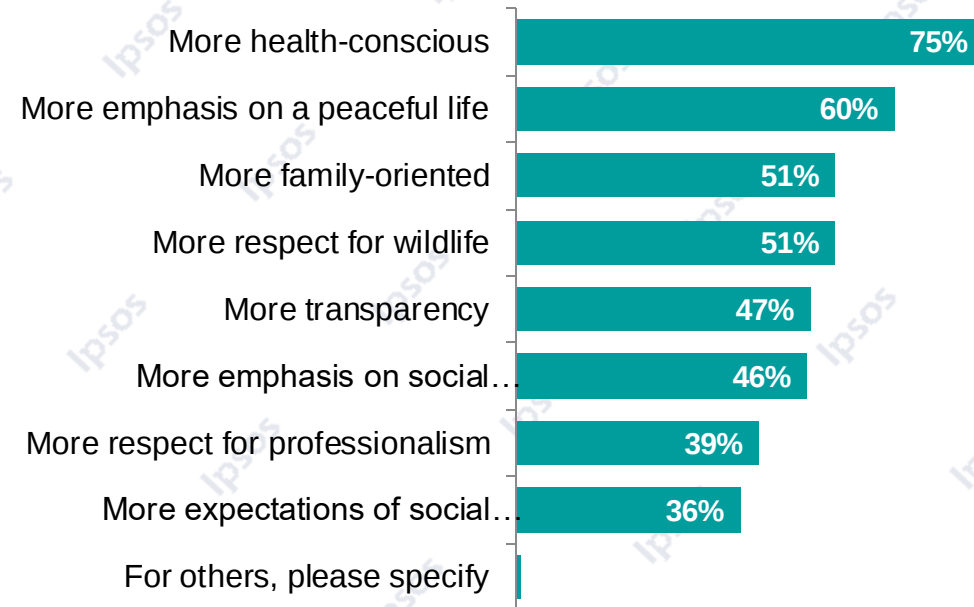
THE EPIDEMIC HAS ALSO PROMOTED CHANGES IN SOCIAL VALUES PEOPLE NOW PAY MORE ATTENTION TO HEALTH AND A PEACEFUL LIFE

64% Say COVID-19 has affected
their social values

N=1512

Impact of the epidemic on Chinese social values

N=1498



*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times - Wave 1, Research period: February 2020

RETURN TO RATIONAL CONSUMPTION, FOCUS ON ESSENTIALS OF LIFE AND PAY MORE ATTENTION TO HEALTH - NEW KEY WORDS OF ATTITUDE TOWARDS LIFE

More rational consumption



Focus on essentials of life



Pay more attention to health



62% of consumers agree
"Consume wisely and plan for the long run"

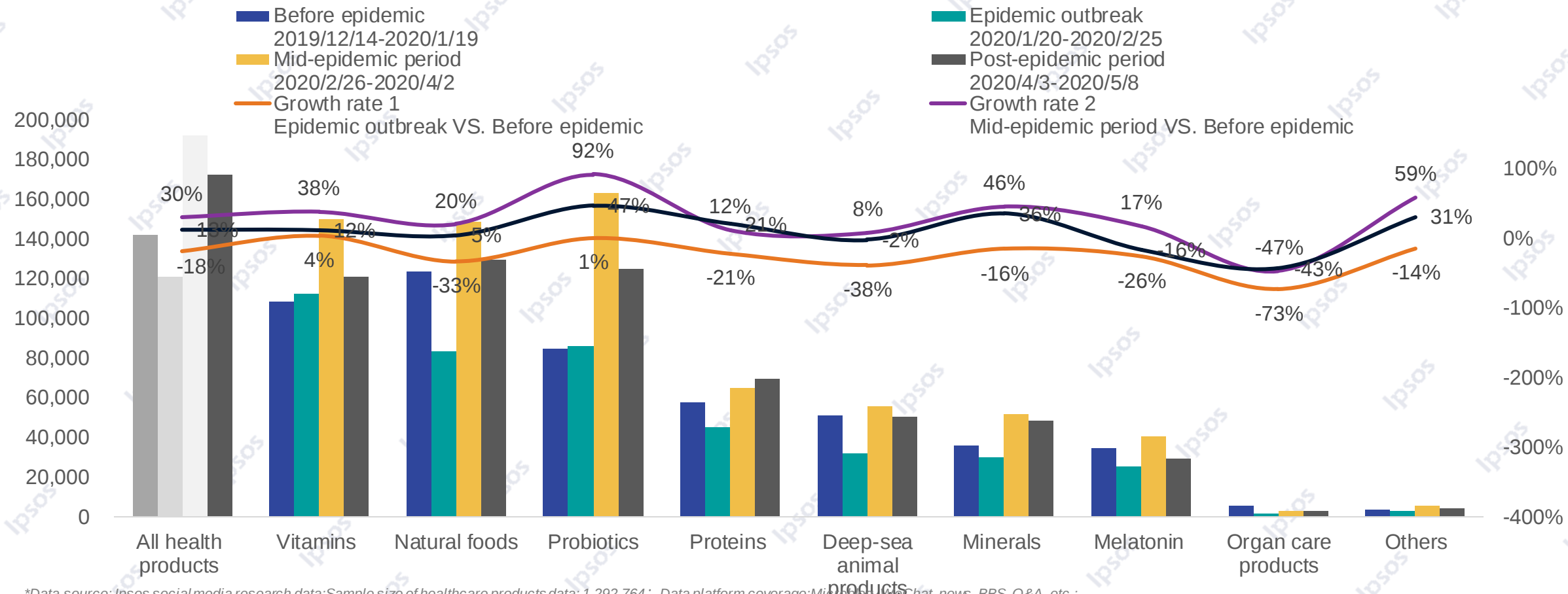
58% of consumers agree
"Pay more attention to daily life"

75% of consumers agree
"Pay more attention to health"

*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times - Wave 1, Research period: February 2020

COMPARED WITH THAT BEFORE THE COVID-19 OUTBREAK, CONSUMERS' ATTENTION TO HEALTHCARE CATEGORY HAS INCREASED SIGNIFICANTLY, ESPECIALLY VITAMINS, PROBIOTICS AND MINERALS

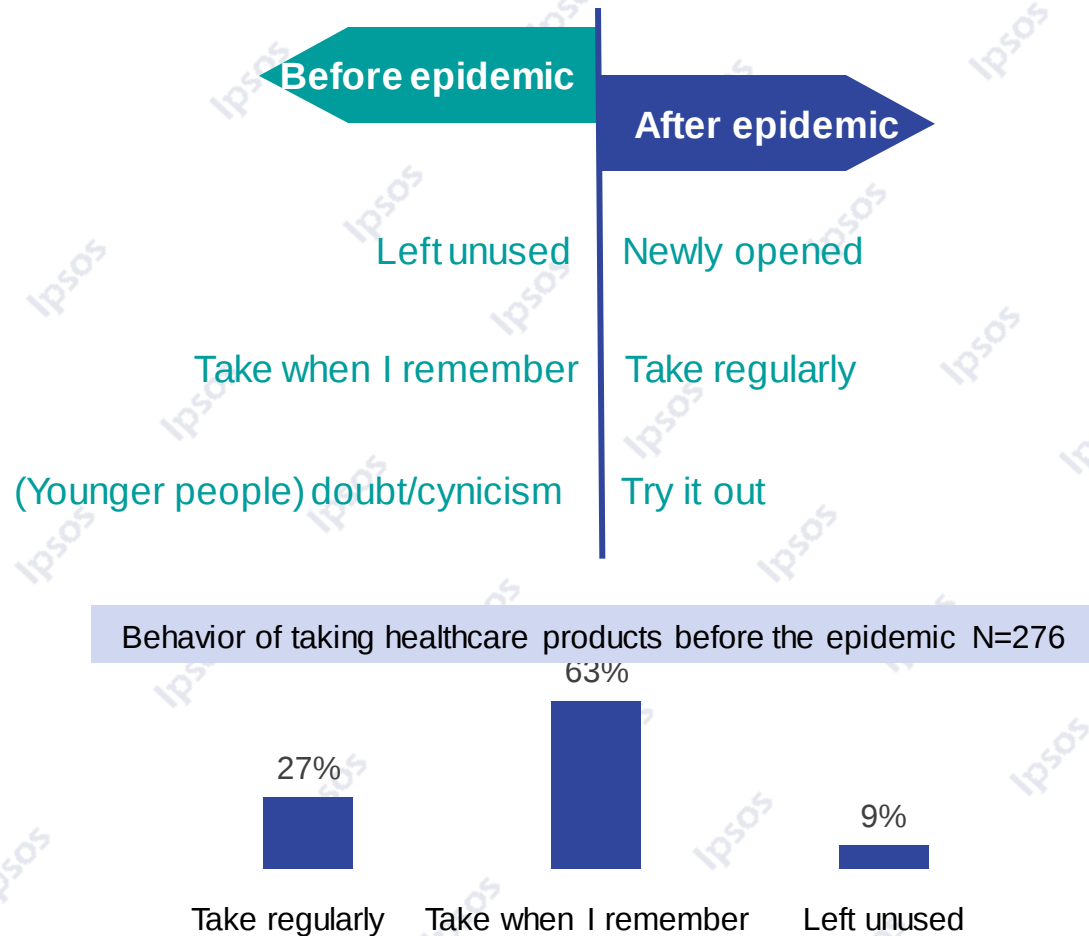
Overview of online volume of healthcare products



*Data source: Ipsos social media research data; Sample size of healthcare products data: 1,292,764; Data platform coverage: Microblog, WeChat, news, BBS, Q&A, etc.;



CHERISHING LIFE IS NOT A SLOGAN, BUT A PROGRAM OF ACTION UNDER THE NEW NORMAL



*Data source: Ipsos | The Impact of Covid-19 on the Healthcare Category in China; Research period: February-March 2020

What did Internet users say...

"Apart from having health-enhancing herbal tea made by my mom, I also bought some VC dissolving pills, I think they somehow will help to enhance my immunity"- Mr. Lu

"This epidemic has made me take calcium tablets again, which I used to take but forgot about for a long time"

"I strongly feel that I would be one of the older people who are tricked into buying healthcare products and wanting to stay young forever by taking them" - Internet user Liu Erhei

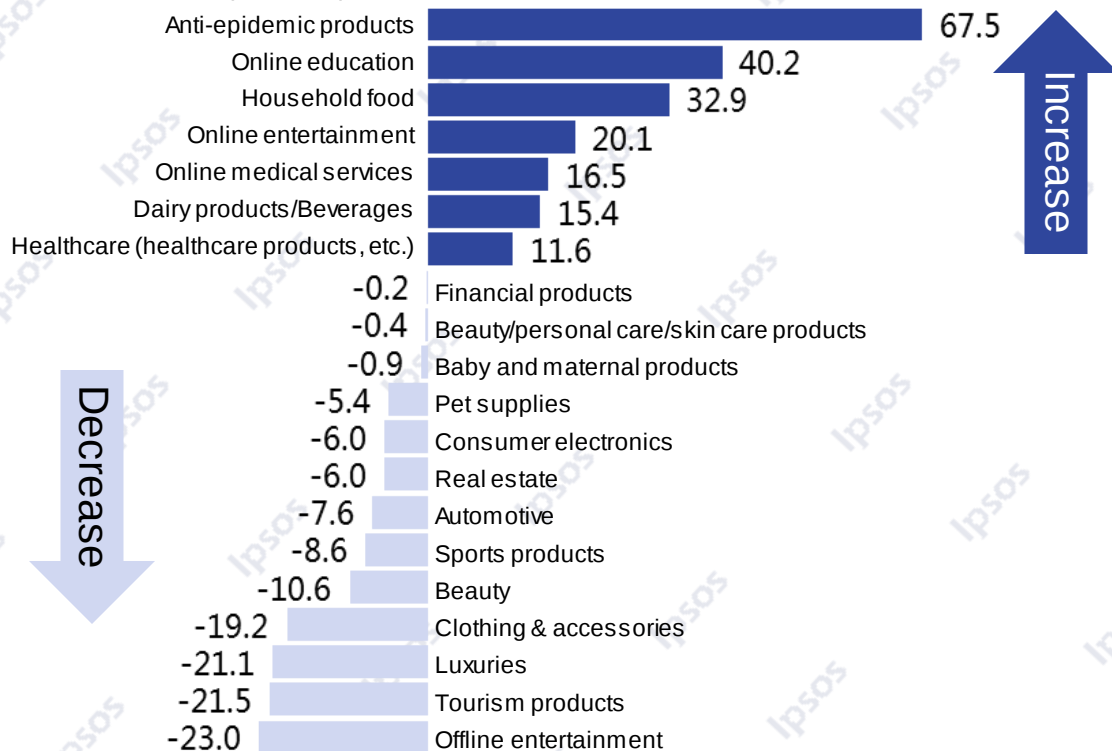
"The VB, grapeseed, liver protection pill, fish oil, and other forgotten storage products – I am now taking them every night"

DAIRY PRODUCTS HIGH IN PROTEIN AND NUTRITION ARE POPULAR AMONG CONSUMERS DURING THE EPIDEMIC. IMPROVING IMMUNITY IS THE MOTIVATOR TO PURCHASE THEM.

Consumer attitudes - Consumption change by category (%)

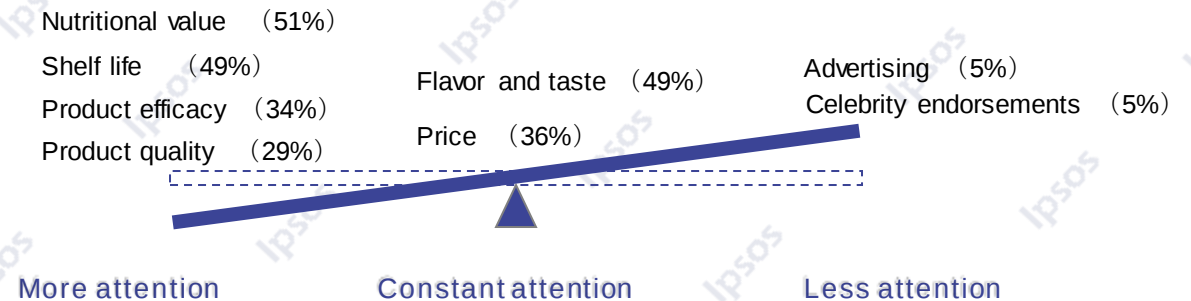
Research period: April 2020, N=1492

(Buy more% - Buy less%)



Reasons for purchasing dairy products during the epidemic

Research period: February 2020, N=1104



*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times - Wave 1 & 2, Research period: February & April 2020

DURING THE EPIDEMIC, THE CONSUMPTION SCENARIOS OF DAIRY PRODUCTS HAVE BEEN EXPANDED FROM "DRINKING" TO "EATING".

Tick Tok /Kuaishou: A variety of ways to eat



On the Tick Tok/Kuaishou, a variety of videos about simple food making inspire new ways to "eat" milk.

Gourmet media platforms: Top ingredient of dessert



In food programs, dairy products, as an important ingredient in a variety of desserts, are better integrated into the food production scenarios (e.g. making milk puffs in the picture above).

Emerging of hot topics online

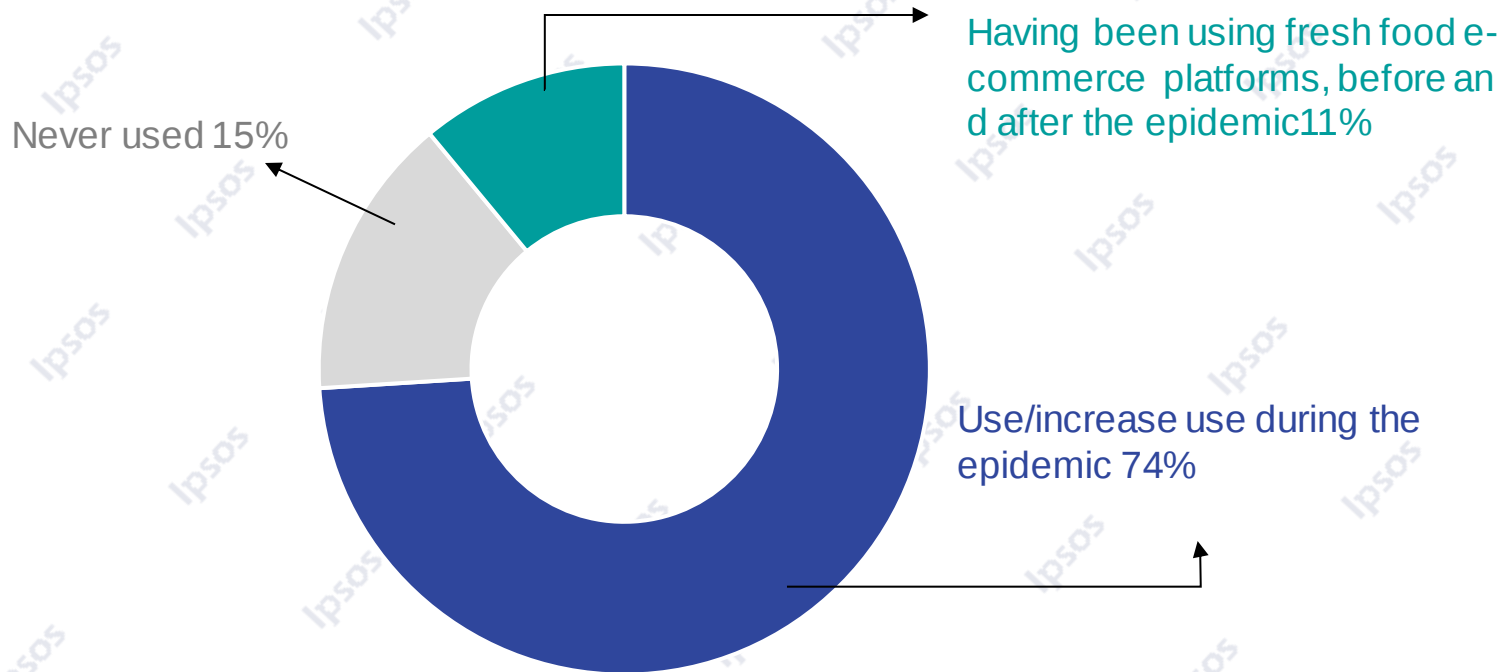


Hot topics in Weibo

*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 1), Research period: February 2020;

AFFECTED BY THE EPIDEMIC, THE OFFLINE PROCUREMENT OF FRESH FOOD WAS BLOCKED, AND THE USE OF ONLINE FRESH FOOD E-COMMERCE APPS INCREASED SIGNIFICANTLY.

74% of people said that they started or increased their use of online fresh food e-commerce platforms because of the epidemic



The fresh food e-commerce apps with high mentions include: FreshHema, Meituan, Daojia.jd.com, Fresh.jd.com and MissFresh, etc.



*Data source: Ipsos | Report on User Experience of Fresh Food E-Commerce Platforms during the Epidemic, Research period: March 2020;

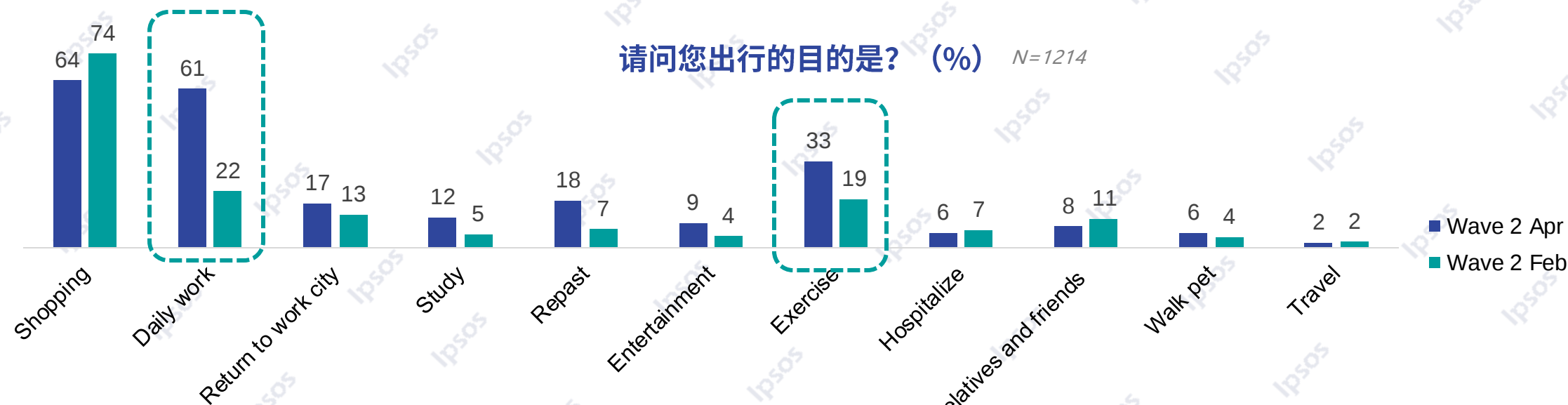
AS THE EPIDEMIC WAS GRADUALLY UNDER CONTROL, 80% OF PEOPLE STARTED TO GO OUT IN THE LATE STAGES OF THE EPIDEMIC. MORE PEOPLE RETURNING WORKING AND EXERCISING OUTSIDE INCREASED DRAMATICALLY

81% VS 55%

N=1492

people have been out of the home in the last two weeks

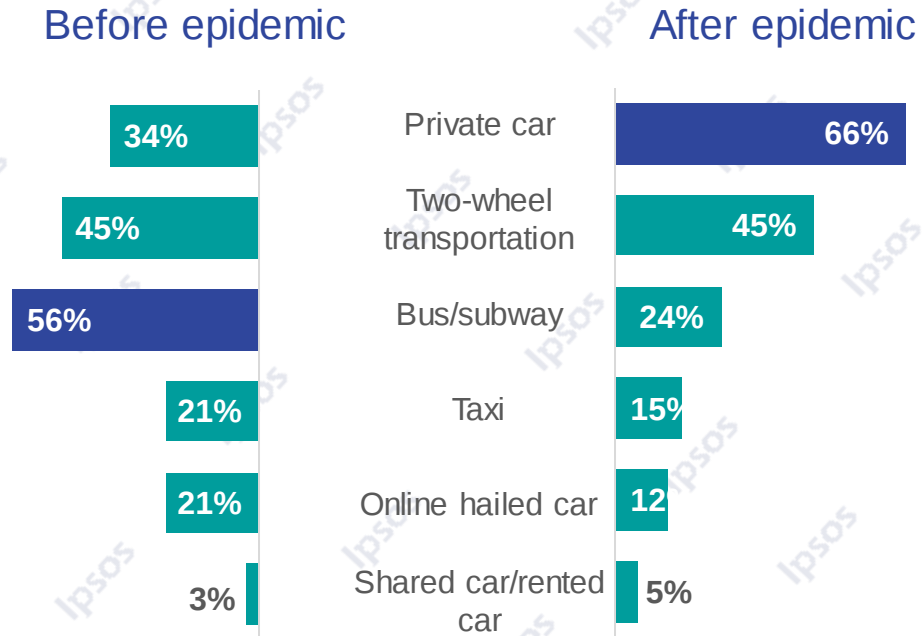
people have been out of the home during Spring Festival



Data Source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: Apr 2020



IN TERMS OF TRAVELING, THE DEMAND FOR PRIVATE CARS INCREASED SIGNIFICANTLY AFTER THE COVID-19 OUTBREAK



-6%

According to the figure in 2020 April, consumers will cut down on car purchasing.

N=1620
Research period: February 2020

*Data source: Ipsos | Content Marketing in Automobile Industry during the COVID-19 Outbreak, Research period: February 2020;
Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: April 2020

79% OF PROSPECTIVE FIRST-TIME BUYERS CHOOSE ONLINE SHOWROOMS OR VIRTUAL 4S SHOPS TO VIEW CARS

For hardest-hit areas during COVID-19 outbreak, online car purchase solutions (online payment, online insurance, online financial program qualification review) are very attractive, and buyers intended to choose door-to-door test drive/car delivery service

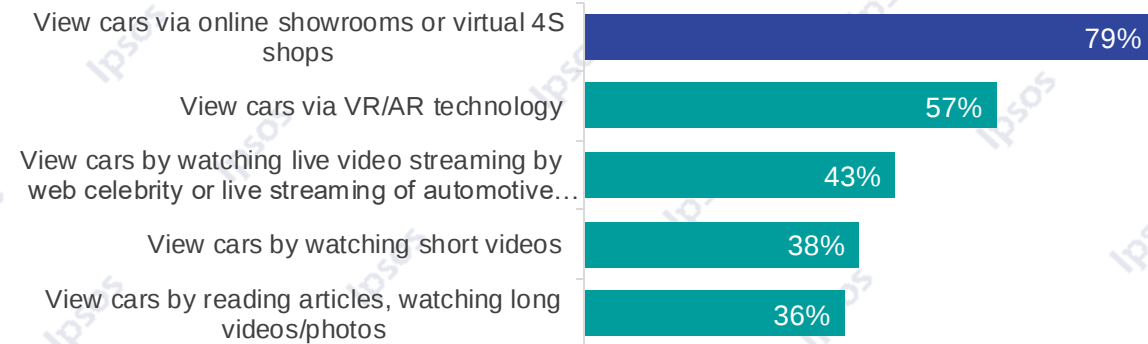
42%

Consumers in hardest-hit areas found online car buying solutions very attractive

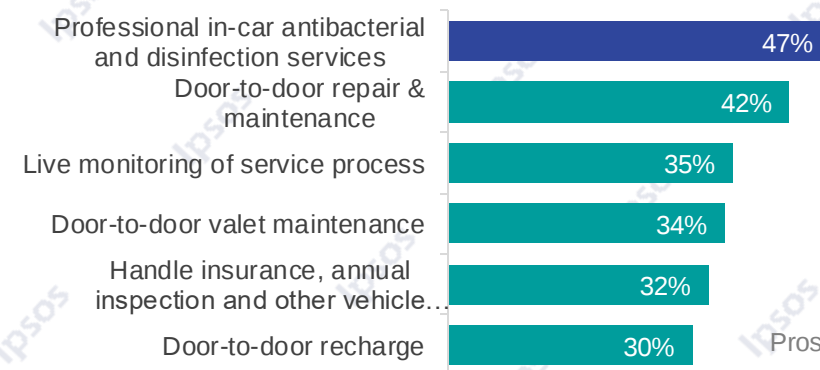
79%

Consumers in hardest-hit areas would choose door-to-door test drive/car delivery service, and hope that the 4S shop can disinfect the car in advance

Online car viewing



Very attractive value-added services



Prospective first-time buyers (N=430)

*Data source: Ipsos | Content Marketing in Automobile Industry during the COVID-19 Outbreak, Research period: 2020.2.24

CHINESE CONSUMERS HAVE STRONGER WILLINGNESS TO BUY CARS, BUT THEY ARE MORE SENSITIVE TO THE PRICE. WHETHER TO REDUCE THE PRICE WILL AFFECT THE PURCHASE DECISION

Purchase Plan Change [Intenders]

More Likely to
purchase new/used



33%

Reasons for Purchase Intention Decrease [Intenders]

Waiting for prices to
go down

19%

BY COUNTRY

<u>USA*</u>	<u>China*</u>	<u>Japan</u>	<u>Brazil</u>	<u>France*</u>	<u>Germany</u>	<u>Italy</u>	<u>Spain</u>	<u>UK</u>	<u>Russia</u>	<u>India</u>
32%	63%	19%	30%	27%	15%	20%	21%	21%	32%	40%
26%	54%	7%	17%	31%	18%	12%	18%	17%	17%	26%

Data Source: «Ipsos Automotive Navigator: Covid-19 Impact on Automotive and Mobility»
Q: How interested would you be in completing the following entirely online?, Total n=11,000; n=1,000 per country

AFFECTED BY THE EPIDEMIC, 66% SAID THEY WOULD POSTPONE THE PURCHASE PLAN. ONLY 20% SAID THEY WOULD PURCHASE AS PLANNED OR AHEAD OF SCHEDULE. IT WILL TAKE TIME FOR MARKET CONFIDENCE TO RETURN

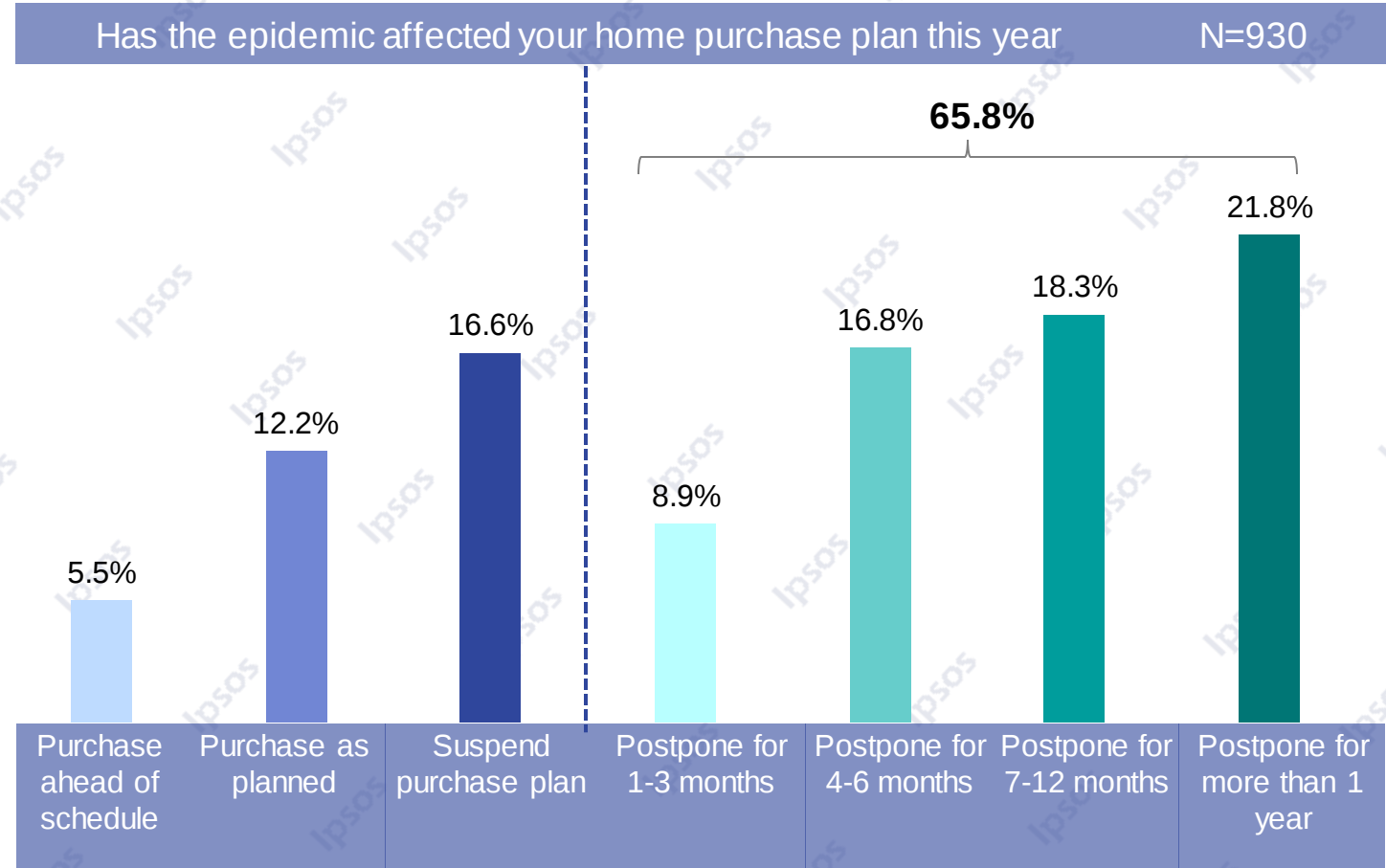
Of 1492 respondents:

62.4%

Consumers having a demand for housing

37.6%

Consumers without purchase plan



Q26. Has the COVID-19 epidemic affected your home purchase plan this year?(Single choice)

*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: April 2020

DURING THE EPIDEMIC, 56.5% OF RESPONDENTS VIEWED RESIDENTIAL PROPERTY FOR SALE THROUGH ONLINE CHANNELS

However, on-site visit still plays an important role in the transaction process

- During the epidemic, 56.5% of respondents viewed residential property through online channels. VR viewing and online intermediary agent recommendation are new forms acceptable to consumers; *but on-site visit still plays an important role in transaction.*
- Respondents expecting to know about real estate projects more through online VR technology in the future reached 38.2%, those expecting to know about information through online intermediary agent recommendation reached 28%. The application of new technologies in real estate viewing is becoming a new way of industry development.

Preferred channels to view/purchase through (%)	
View online and visit offline before purchase	45.4
On-site visit at sales office before purchase	23.2
Purchase after offline recommendation by intermediary agent	11.9
Purchase after knowing online	11.1

What kind of residential property viewing service do you expect from the sales office during the epidemic?

38.2%

Learn about real estate projects through online VR technology

28%

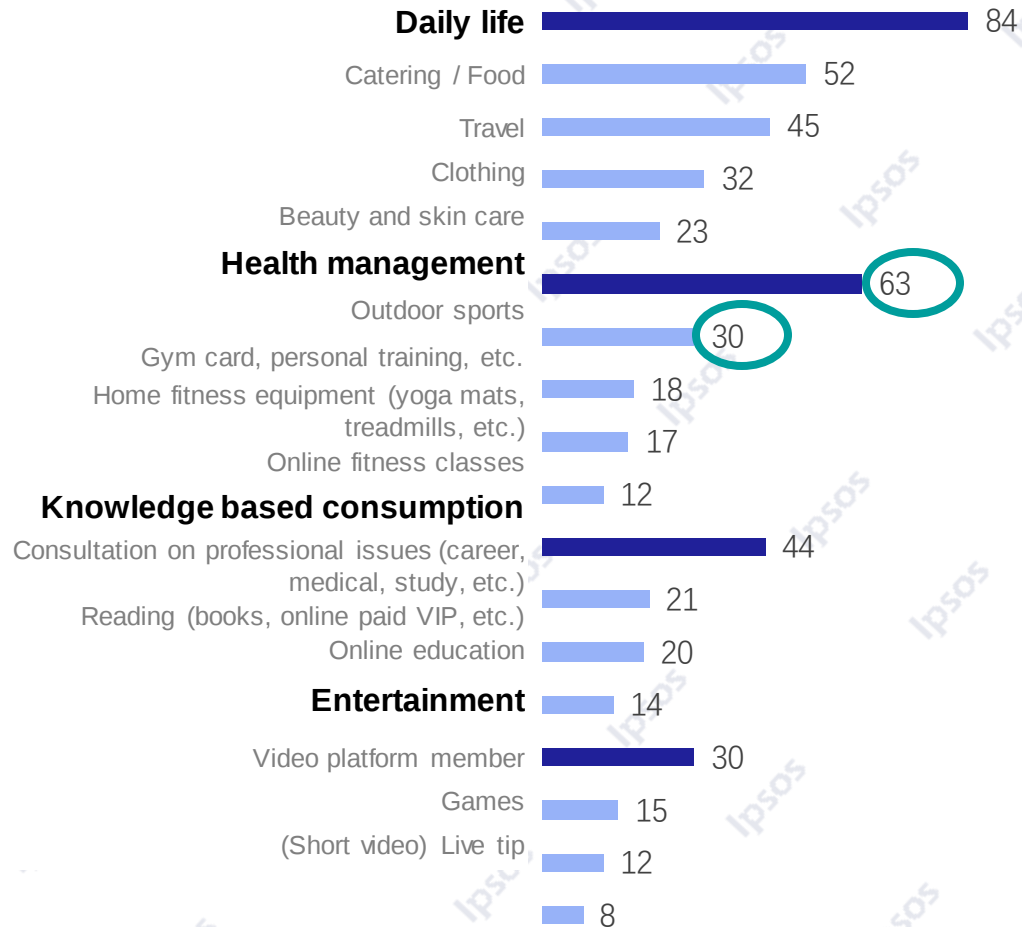
Learn about real estate projects through online intermediary agents

Q33. After this epidemic, which channel do you prefer to view/buy a home through? (Single choice) Q34. What are the main impacts of the epidemic on your expectation of the sales office? (Multiple-choice question)
*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: April 2020



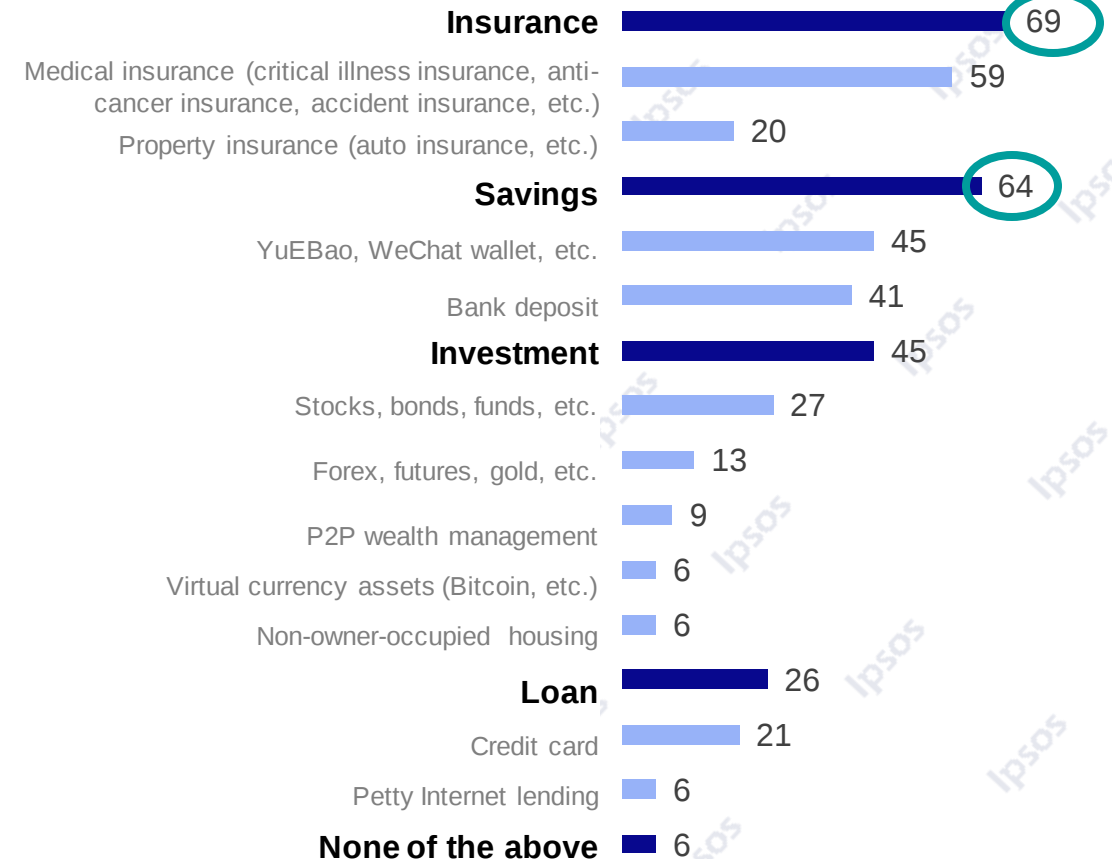
YOUNG GENERATION ARE CARE ABOUT HEALTH AS WELL AS WEALTH

Expected consumption increase (%)



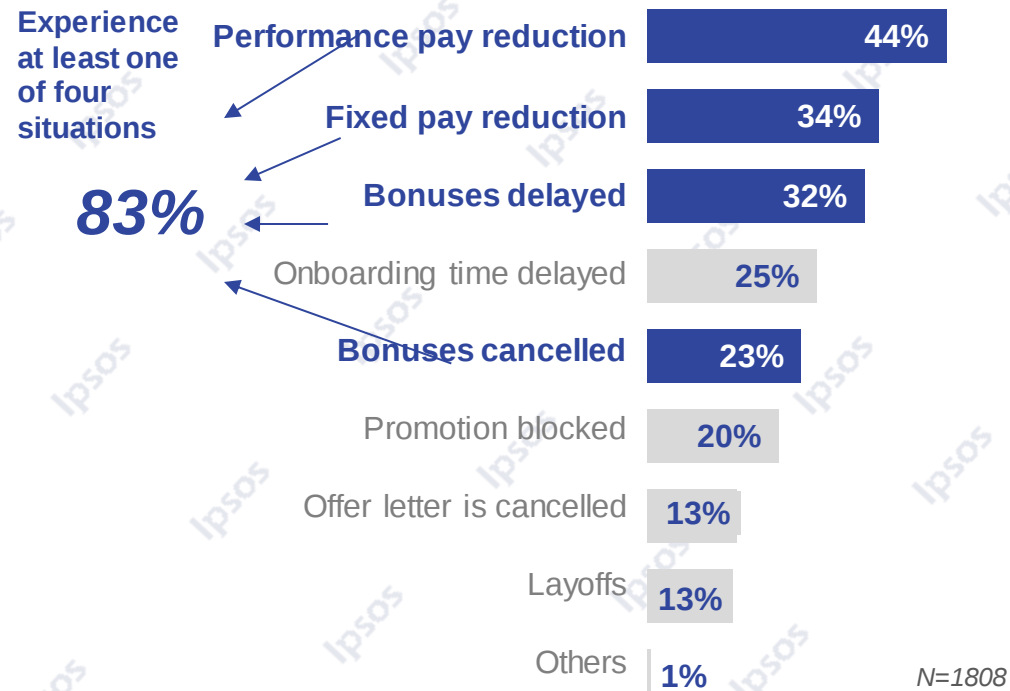
Data Source: Ipsos | Under the epidemic : the young generation, Research period: February 2020

Expected asset allocation increase %

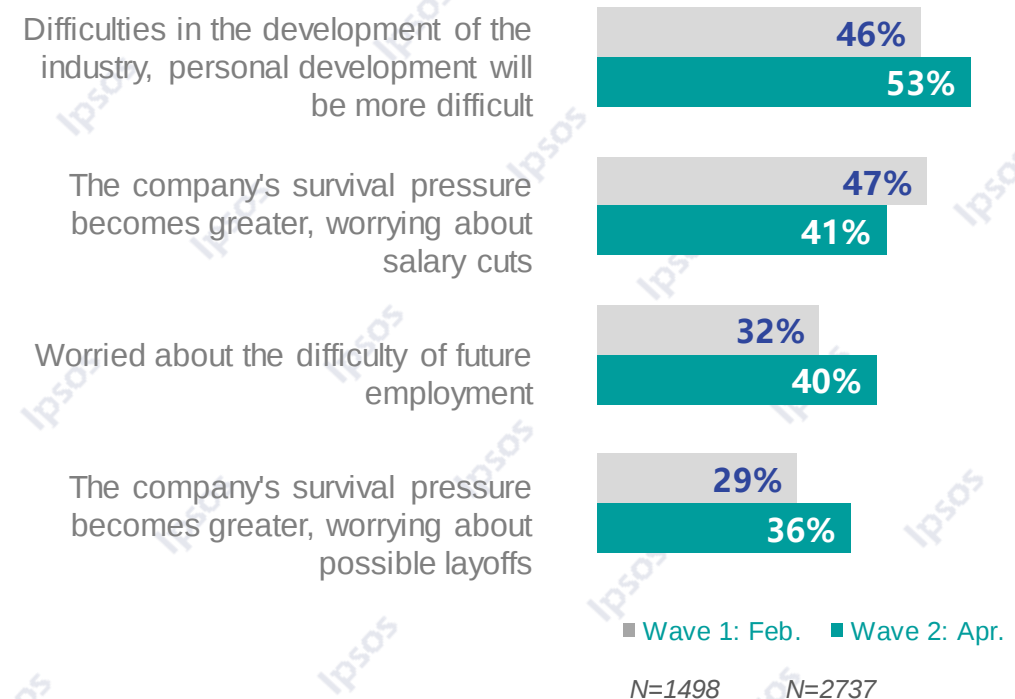


PEOPLE ARE WORRY ABOUT THE EPIDEMIC'S IMPACT ON THEIR INCOMES AND CAREERS. 80% OF THEM THINK THEY NEED TO TIGHTEN BELT

Experiences during the epidemic period



Concerns about personal career development

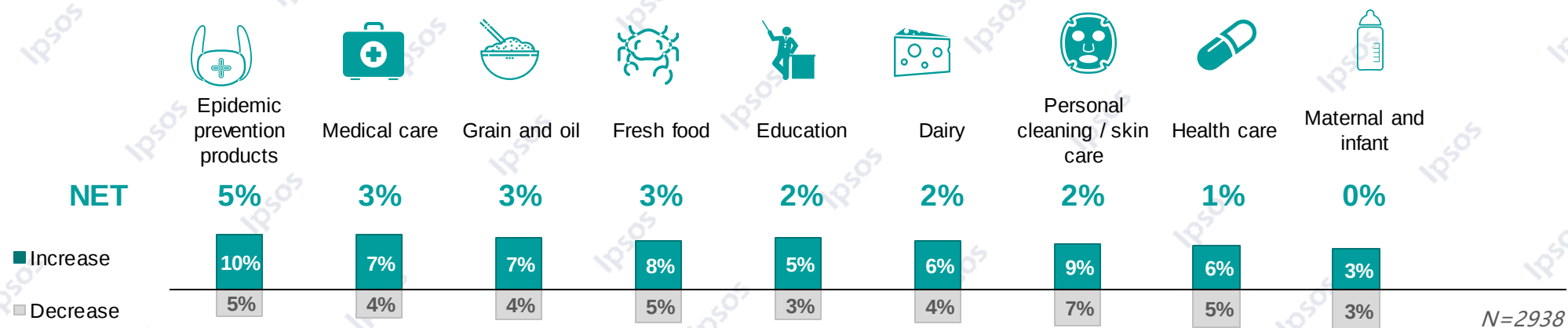


*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: April 2020

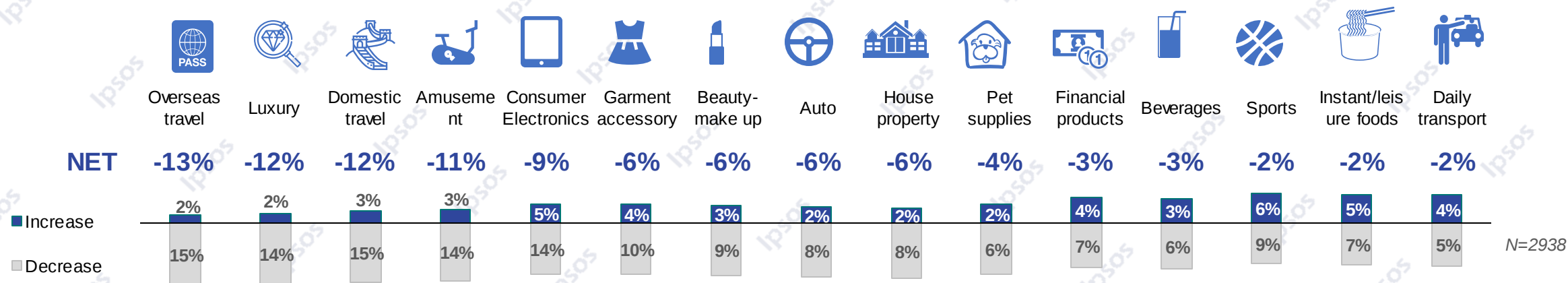
THE IMPACT OF THE EPIDEMIC HAS CHANGED THE SHARE OF WALLETS

People will increase consumption related to health, diet, education but travel, luxury goods, entertainment, consumer electronics consumption will decrease

Will increase consumption in the future



Will decrease consumption in the future



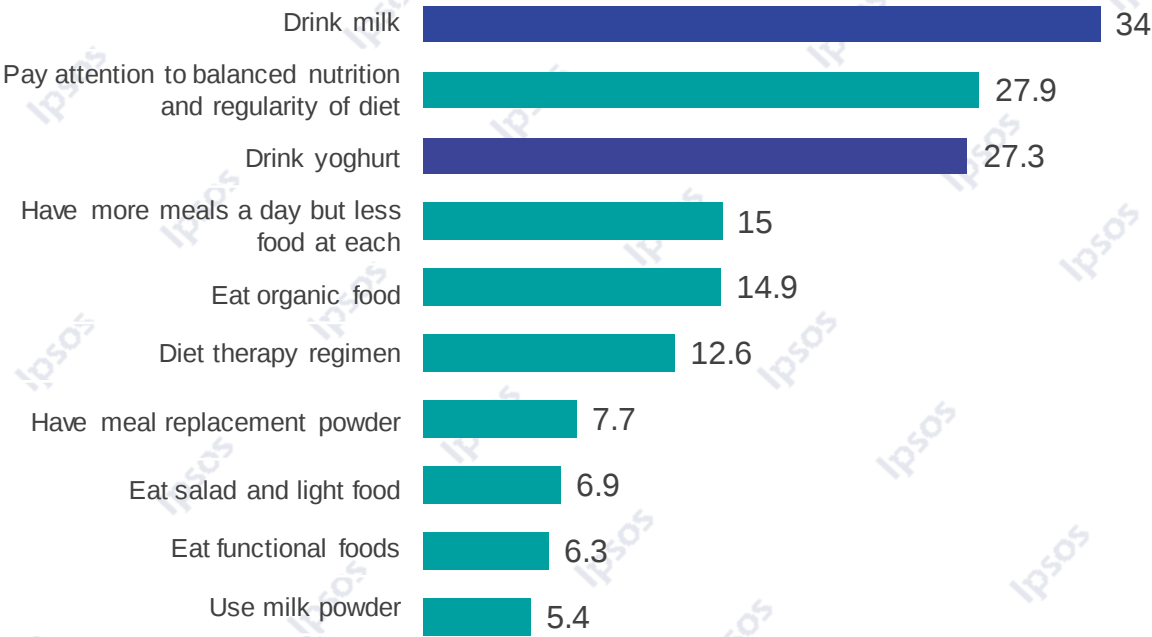
*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: April 2020

Under the new normal, what enlightenment does consumers' constant pursuit of "sense of security" give to enterprises?

noteworthy opportunities for business growth in 2020

DURING THE EPIDEMIC, IT HAS REINFORCED THE PERCEPTION THAT DRINKING DAIRY PRODUCTS IS ONE OF THE CORE WAYS TO IMPROVE HEALTH.

More than 40% of consumers plan to increase their consumption of dairy products, which may bring long-term growth for the dairy industry



Q20 In the current situation, what will you do to improve your health?

50%

Consumers plan to spend more on dairy products



1

noteworthy new opportunities for business growth in 2020

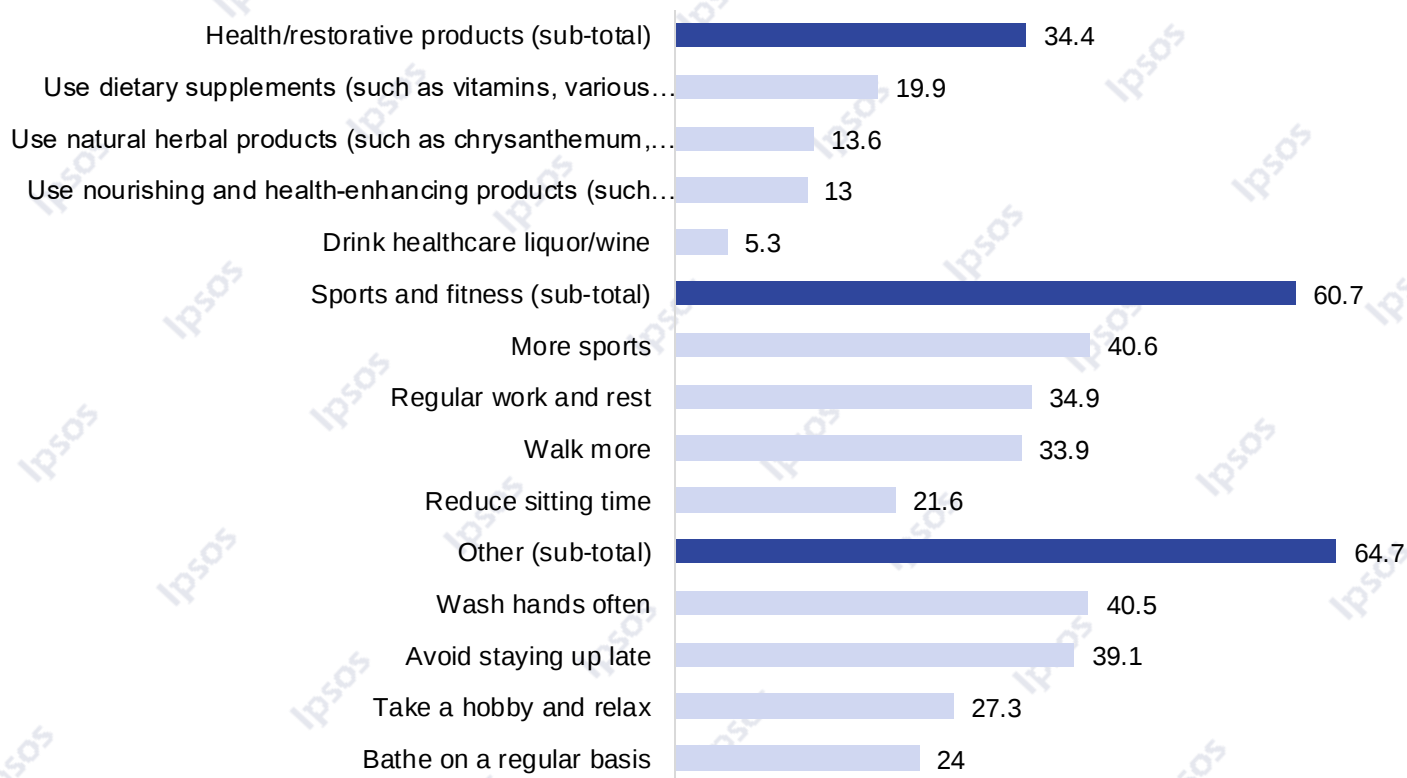
Q12 Did you buy more or less of the following categories of products in the last month?

*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: April 2020



THE FITNESS RELEVANT INDUSTRY MAY BENEFIT IN THE MEDIUM AND LONG TERM. HOUSEHOLD FITNESS EQUIPMENT AND ONLINE FITNESS COURSES WILL CONTINUE EVEN AFTER THE EPIDEMIC

What will you do to improve your health in the future? (Part) (%)



noteworthy new opportunities
for business growth in 2020

*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: April 2020



LIVE STREAMING OF CARS MAY BECOME REGULAR. AND FROM ONLINE CAR VIEWING TO ONLINE CAR BUYING/RENTING, THE CHINESE CAR MARKET MAY BE LED INTO A CLOUD ERA

67% of Chinese consumers are interested in buying/renting a car online, ranking first

India ranked second at 50%, followed by Brazil at 32%, Germany at 31%

Demand side

Consumers watch car purchasing live, and look to further increase of it as well



Supply side

Car purchasing live becomes an important media of Auto enterprises' marketing

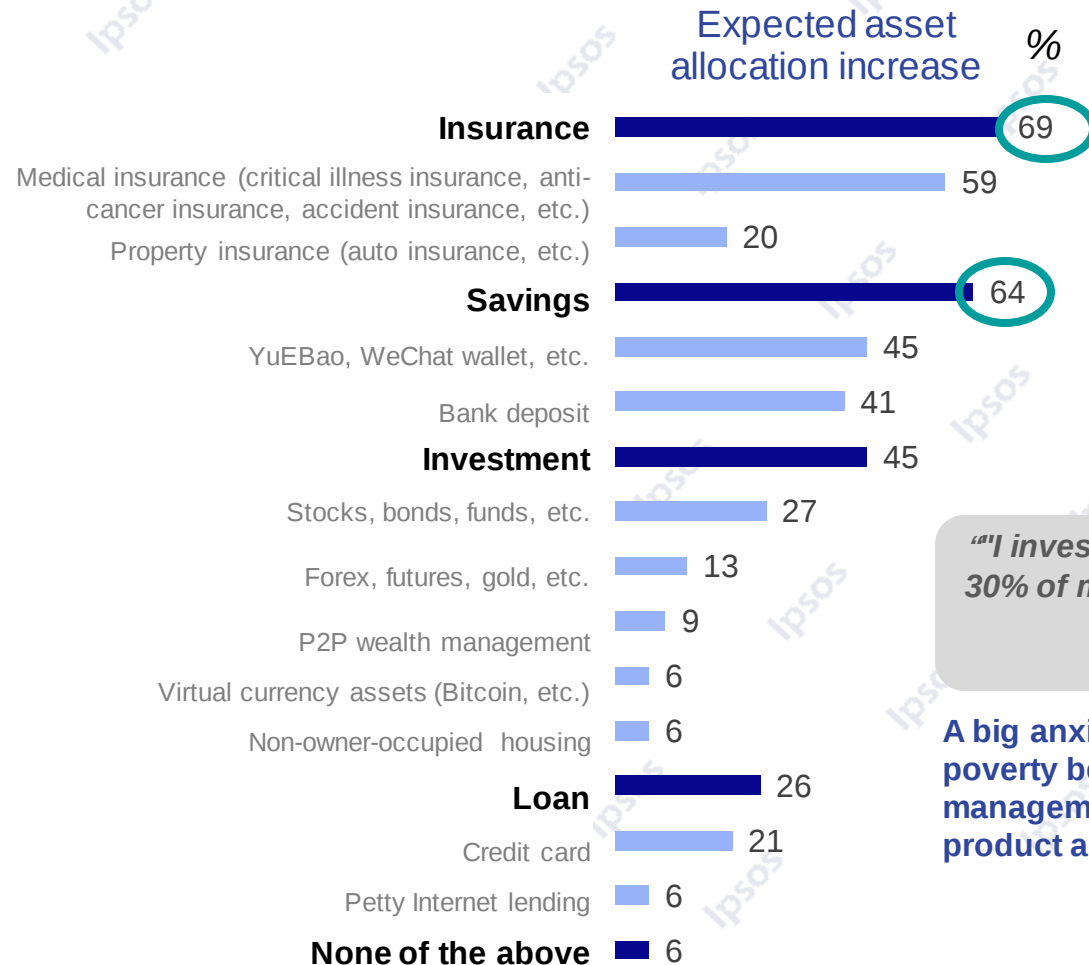


3

noteworthy new opportunities for business growth in 2020

*Data source: Ipsos Automotive Navigator : Covid-19 Impact on Automotive and Mobility
Ipsos × Ocean Engine: Research Report on Live Streaming of Cars in 2020
Q : How interested would you be in completing the following entirely online? Total n=11,000; n=1,000 per country

INSURANCE AND FINANCIAL INDUSTRIES PENETRATE IN YOUNGSTERS, WITH MORE OPPORTUNITIES IN MEDIUM AND LONG TERM



"I invest a little more in my skills to earn money. A fixed 30% of my income is put aside for regular deposits."

- Wuhan, Tingting, 30 years old

A big anxiety arising from the epidemic is that one may fall into poverty because of illnesses. Medical insurance and wealth management will attract more young customers, and related product and demand deserve more energy to develop

4

noteworthy new opportunities for business growth in 2020

Data Source: Ipsos | Under the epidemic : the young generation, Research period: February 2020

THE COVID-19 EPIDEMIC HAS RESHAPED THE TRADITIONAL CLASSROOM RELATIONSHIP THROUGH A MASSIVE "ONLINE EXPERIMENT".

How to understand the education sector and teacher-student relations from the perspective of new media relationship so as to optimize product experience is crucial to the long-term growth of online education services

40.2%

Net growth in online education category
consumption in the last month
(Bought more % - Bought less %)



Consumer pain point 1: Online classes make students sleepy and absent-minded



是余漂亮吖

5-7 14:54 来自荣耀20

十关注

夏天是个犯困的季节，外加是网课，自然就着了🐼

#网课生活图鉴#

Consumer pain point 2: Online classes tire eyes



Leben 雪青

4-28 11:45 来自搜狗高速浏览器

十关注

终于结束了一上午眼睛都快瞎掉的在线学习，可以吃饭了。

奔波于慕课微信小程序 QQ 钉钉学习通的日子什么时候是个头啊 🙄

**noteworthy new opportunities
for business growth in 2020**

*Data source: Ipsos Social Listening data, Research period: May 2020; Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: April 2020

THE EPIDEMIC HAS ACCELERATED ONLINE SHOPPING, BUT CONSUMERS IN LOWER-TIER CITIES STILL PREFER LARGE OFFLINE CHAIN STORES. HOW TO DO A GOOD JOB IN 020 SINKING SERVICES MAY BECOME THE KEY TO MAINTAIN THE GROWTH OF ONLINE SHOPPING PLATFORMS

Channel for purchasing products and services during the epidemic	Nationwide		Tier 1		Tier 2		Tier 3 and below	
N=	1104(wave1)/1492(wave2)		431	612	448	588	225	292
Ordinary e-commerce platforms (Tmall, JD.com, Suning.com,...)	46.3	47.3	49.7	47.3	46.4	44.7	39.6	33.6
Lifestyle apps (Meituan, Ding Dong, Freshhema, etc.)	38.6	31.8	42.0	42.3	40.6	28.1	28	17.1
Online platforms for shopping malls / department stores (WeChat...)	34.0	23.7	31.1	21.6	37.1	25.2	33.3	25.3
Hypermarkets (Carrefour, Wal-Mart, etc.)	33.1	36.1	39.0	41.3	33.7	36.2	20.4	25
Convenience stores / Grocery stores	28.5	26.6	28.1	25	31.9	27.6	22.7	28.1
General supermarkets	27.5	27.7	26.5	27.7	30.1	28.1	24.4	27.7
Shopping malls / Department stores	24.5	23.7	23.7	21.7	25	26.7	25.3	21.6
Large offline chain stores (Gome / Suning / Dixintong / Funtalk etc.)	24.5	17.8	21.6	19.4	26.3	16.3	26.7	17.5
Ordinary retail stores (mobile phone retail, fruit retail, etc.)	23.1	16.4	23.2	14.5	22.1	16.3	24.9	20.5
Social e-commerce platforms (Mocu Street, Meishuo,...)	21.4	14.5	20.2	16	21.9	12.9	22.7	14.7
Personal goods stores (Watsons, Mannings, etc.)	17.0	12.2	19.5	11.9	15.4	11.7	15.6	13.7
Brand stores	12.7	10.2	13.7	12.4	11.2	8.7	13.8	8.6
Operator outlets	9.7	8	8.8	8.2	9.8	7.1	11.1	9.2
Cross-border e-commerce	8.9	6.2	10.7	6.2	7.4	4.4	8.4	6.1
Wechat merchants	8.7	7.9	9.0	8.3	8.9	7.7	7.6	7.5

6

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*Data source: Ipsos | Optimism and Anxieties during COVID-19 Outbreak - Chinese consumers in difficult times (Wave 2), Research period: April 2020

BE SURE. GO FURTHER.

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ipsos_china@ipsos.com

GAME CHANGERS



CÓMO NOS PREPARAMOS PARA EL POST-CONFINAMIENTO

3

Juan Gabriel Herrera
Understanding Unlimited Leader
Ipsos Perú



**Cómo nos
comportábamos
ayer no será la forma
de comportarnos
mañana.**

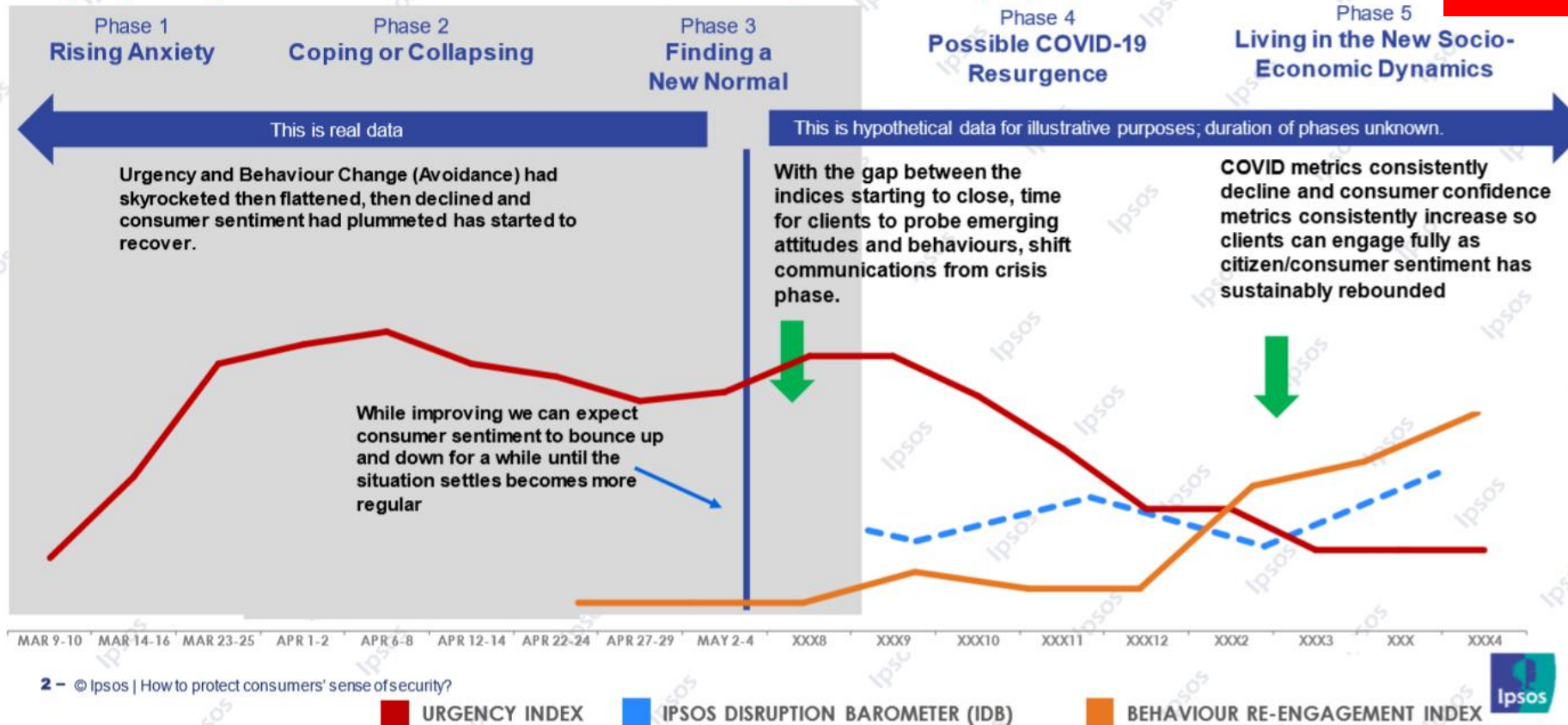


DE LAS 5 FASES QUE VIMOS, ¿DÓNDE ESTAMOS NOSOTROS?

ENTRA A WWW.MENTI.COM (CÓDIGO 509122)

THE PUBLIC'S ANXIETY AND SENSE OF URGENCY CAUSED BY COVID-19 ULTIMATELY LEADS TO LASTING CHANGES IN CONSUMER BEHAVIOR.

Only capitalizing on the trend of such circumstances, can enterprises effectively cope with the "new normal".



En Perú, probablemente sigamos en estas transiciones durante un largo tiempo

¿QUÉ SIGNIFICA ESTO PARA NUESTROS CLIENTES?

¿MITO? **¡MITO!**

“No está pasando mucho hoy en los hogares peruanos”

Los comportamientos de las personas se van adaptando día a día y se van formando nuevos hábitos que podrían ser difíciles de entender si no les prestamos atención desde su formación



Optimistic values

Radical values

Positivism in technology, growth & capitalism

Radical Change

Conscious Consumption

CHANGE

CONSERVE

OPEN

CLOSED

Licores: El entretenimiento y el consumo no desaparecen, solo se reinventan



Limeños toman más vino durante la cuarentena



Perú: Policía condena maltrato a transexuales en cuarentena Covid-19



Coronavirus en Perú: ¿Cuál es la dieta que debemos seguir para potenciar nuestro sistema inmunológico?



El 47% de peruanos casi nunca consume medicinas prescritas por un médico

Zamora advierte sobre automedicación en pacientes con COVID-19

El ministro de Salud hizo un llamado para que la ciudadanía no compre medicamentos usados para tratar a pacientes con coronavirus sin tener orientación profesional.



CANTAN 'CONTIGO PERÚ' Y SE DAN ANIMO EN AISLAMIENTO



Carta Abierta al Perú

A más de dos meses del inicio del Estado de Emergencia por el COVID-19 y las consecuencias medidas que han afectado a la ciudadanía y a la vida de todos los peruanos, queremos compartir con el pueblo peruano:

1. A la luz de algunas políticas que se han estado implementando desde el gobierno y de las propuestas legislativas que se presentan y aprobarán en el Congreso en la siguiente agenda, entendemos, y entendemos, la necesidad de responder a las necesidades del desarrollo social y el crecimiento económico que nuestro país ha venido experimentando en los últimos tiempos.
2. La desorganización frente a los efectos perniciosos de la pandemia no puede hacerse responsable al gobierno que se ha comprometido al pueblo peruano a que todos los peruanos prosperen y prosperen. Responder a desafíos que promuevan la contribución de una ciudadanía a mejorar la salud del ciudadano y a la reducción de las desigualdades, de manera que a la necesaria reactivación económica que las heridas peruanas esperan.
3. Por ello, con el mayor respeto y convicción democrática, invitamos a los diferentes poderes del Estado a seguir la vía institucional y a través de una ciudadanía que tanto debe haber buscado a la luz de nuestra historia y que no genere un clima de desconfianza y desconfianza política.
4. Las medidas que se proponen y adoptan serán en el Poder Ejecutivo como en el Legislativo deben pasar por un debate público, transparente y libre de intereses, a fin de lograr decisiones justas, acertadas y equitativas, y respetando los derechos de todos los peruanos que forman parte de la Constitución.
5. Hoy más que nunca, se necesita unidad, transparencia, reflexión y madurez en el tratamiento de las políticas públicas.

En esta difícil y larga, pero, prometedora, que el país interior del camino del progreso y desarrollo que, con mucho esfuerzo, paciencia, honestidad y respeto, lograremos realizar el tema que nos une a todos los peruanos: la salud de nuestra República y la vida de todos los peruanos.

Lima, 20 de mayo de 2020



Nostalgic, worried about future

Traditional values

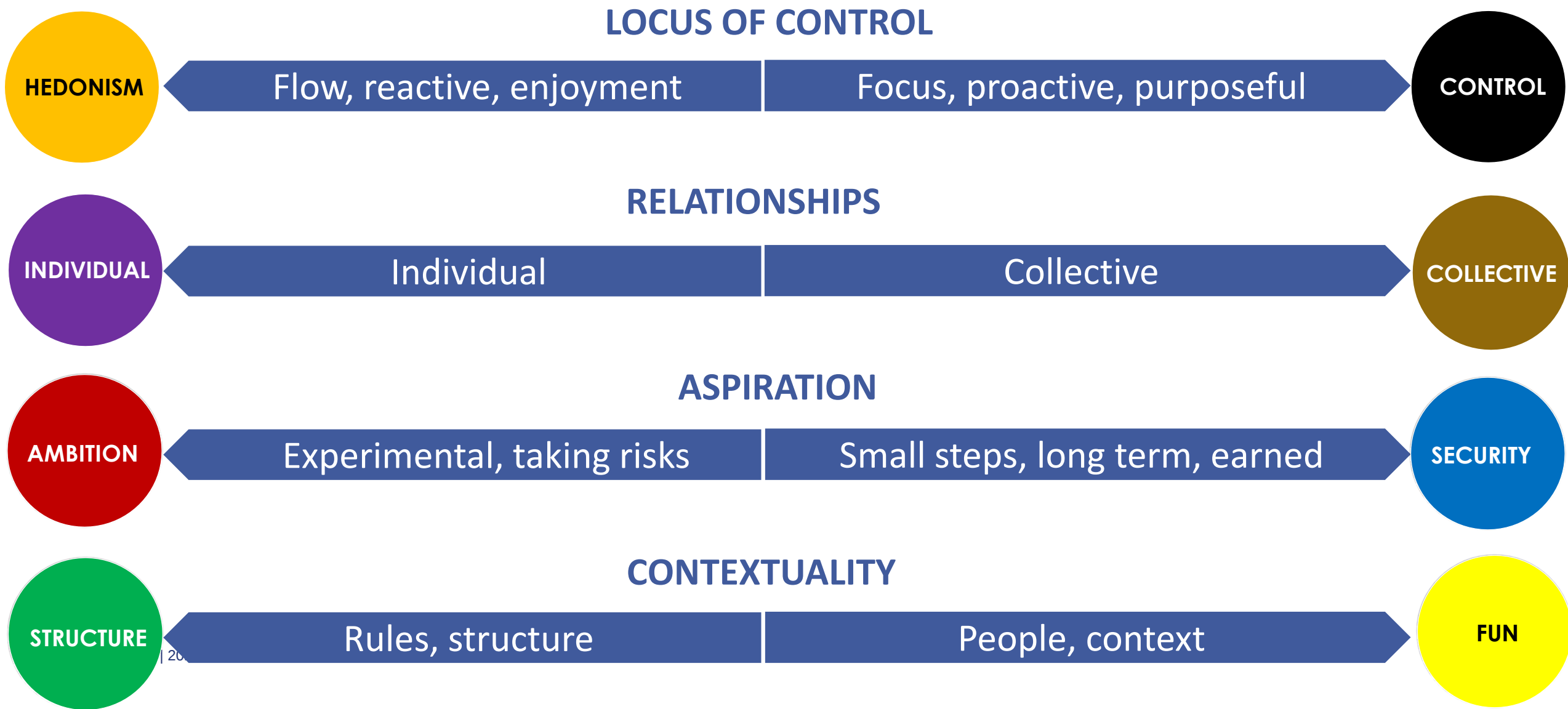
Pessimistic values

Traditional values & nationalism

Fuente: Ipsos Global Trends
Adaptación local



EN IPSOS TENEMOS UN **MARCO MOTIVACIONAL CENSYDIAM**
PARA ENTENDER QUÉ ESTÁ DETRÁS DE LAS CONDUCTAS



Y DE TODO LO QUE HEMOS VISTO, HAY UN FUERTE **COMPONENTE DE SEGURIDAD** EN LAS PERSONAS QUE PODEMOS VER EN DIFERENTES ESTUDIOS HOY



**INCERTIDUMBRE
LABORAL, DE
SALUD, DEL
FUTURO**

“Ya no me interesa tanto que el producto tenga hierro, quiero que nos ayude a tener inmunidad”

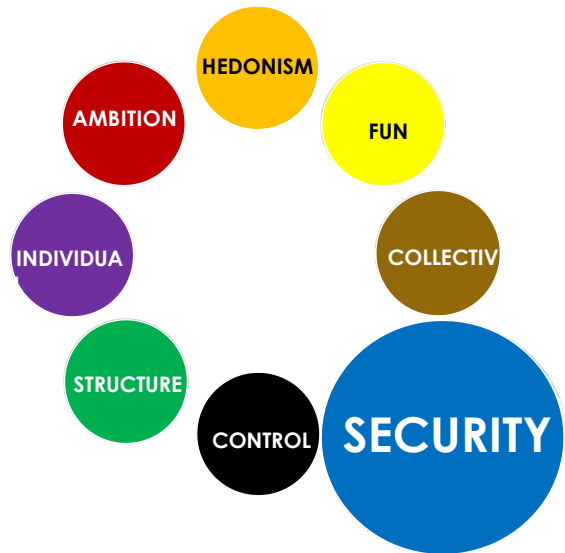
“Es como cuando éramos niños, cuando jugábamos en la casa, hacíamos postres...”

**EL HOGAR SE
VUELVE EL
SANTUARIO
PROTECTOR**

**NOS LLEVA A
TOMAR
DECISIONES
MÁS
RACIONALES**

“No quiero ir tantas veces al supermercado, quiero formatos más grandes”

VAN SURGIENDO **NUEVOS DESAFÍOS** ALREDEDOR DE ESTE NUEVO CONTEXTO, ASÍ COMO OPORTUNIDADES



“Mi familia es mi mejor seguro, mi colchón...si algo me pasa, sé que puedo recurrir a ellos”

“Ahora para estar seguro tengo que comenzar a ahorrar, a cuidarme...”



Las personas actuamos siempre bajo **2 sistemas de pensamiento:**

HOT thinking

Este sistema es intuitivo, casi animal e inconsciente.
Es dominado por las emociones.
Es rápido y de poco esfuerzo.

El sentir supera al pensar.

COLD thinking

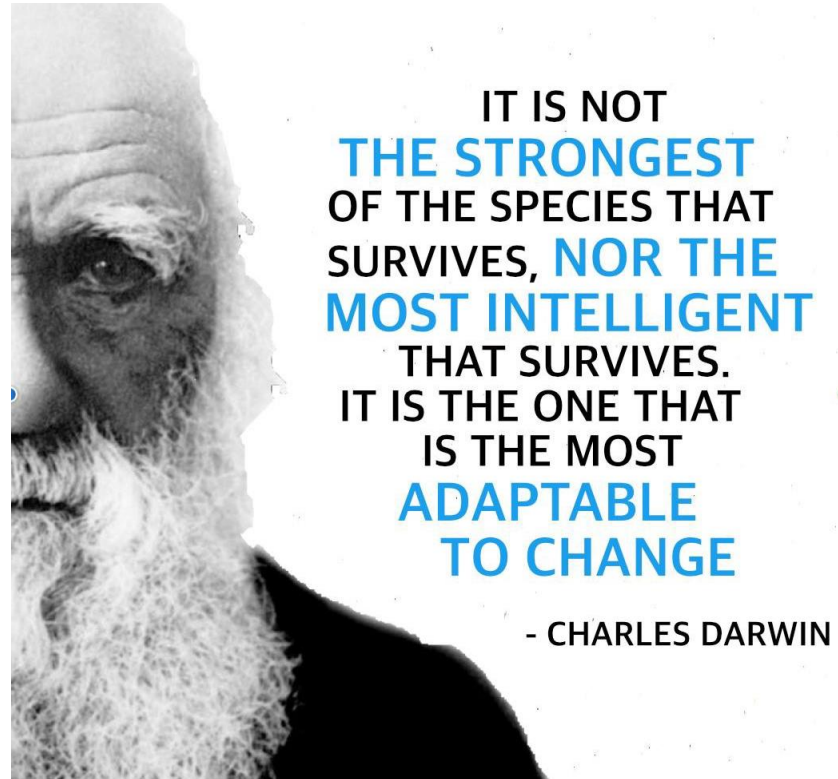
Este es el terreno más lógico, racional y pensado.
Este sistema nos hace actuar y tomar decisiones de manera más
lenta y con gran esfuerzo.

El pensar supera al sentir.

Y ES QUE ESTE ES EL MOMENTO DE **REFUNDAR** NUESTROS
MERCADOS, **REAPRENDIENDO** Y **CO-CREANDO** CON
NUESTROS CLIENTES



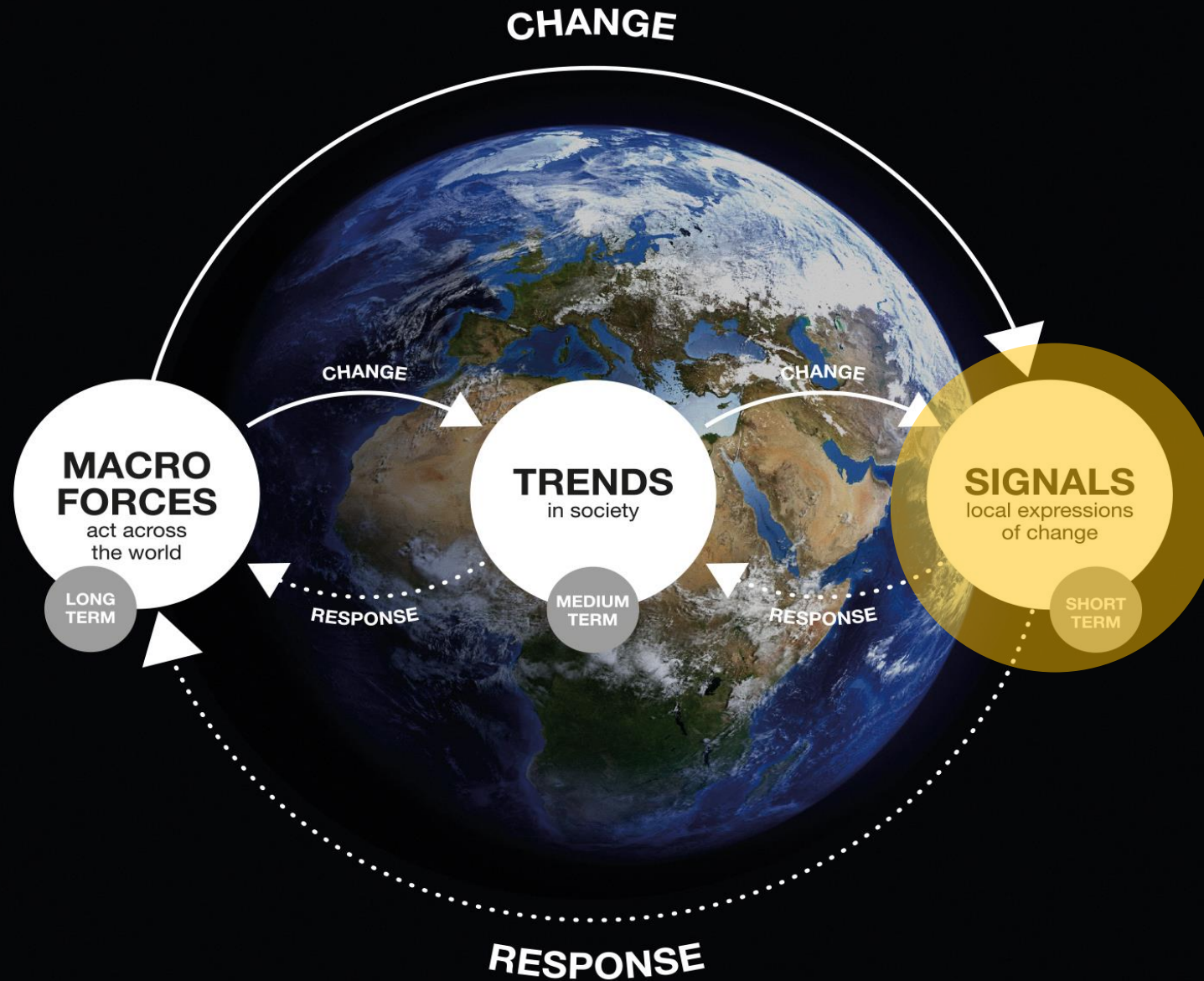
REFUNDAR



REAPRENDE

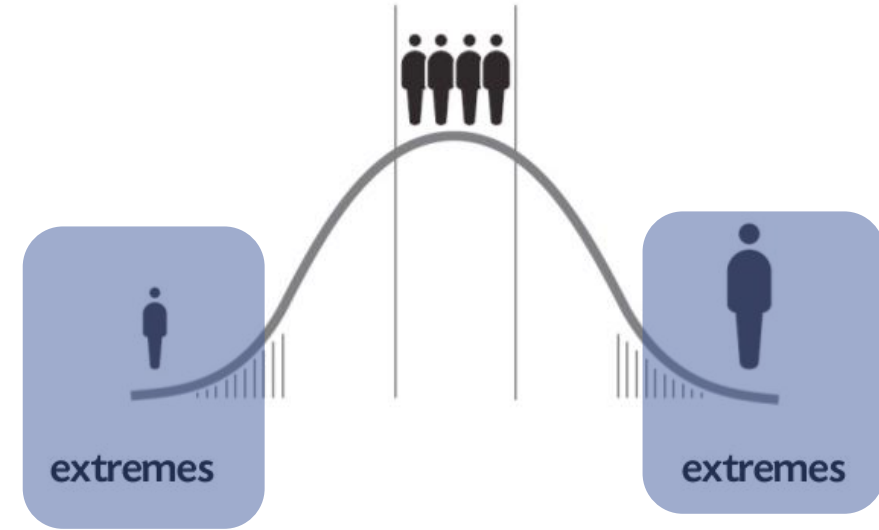


CO-CREA



ALGUNAS FORMAS DE ENCONTRAR SEÑALES: ENTENDAMOS A LOS NUEVOS USUARIOS EXTREMOS

- Estas personas presentan **necesidades** o problemas **mucho más pronunciados** que los usuarios promedio
- En este contexto tan extremos, estas conductas **comienzan a emerger con mayor facilidad** y probablemente se vuelvan las conductas “promedio” dentro de poco
- Si resolvemos el problema de los usuarios extremos hoy, **podremos solucionar el problema a la gran mayoría de usuarios mañana**



POR EJEMPLO, UN USUARIO EXTREMO ES ALGUIEN QUE YA “CRUZÓ EL PUENTE” Y ADOPTÓ UNA NUEVA CONDUCTA.
ENTENDAMOS CÓMO ROMPIERON SUS BARRERAS



ALGUNAS FORMAS DE ENCONTRAR **SEÑALES:** ACOMPañEMOS EL **DÍA A DÍA** DE ESTAS PERSONAS

- La tecnología nos ayuda a **estar cerca de nuestros clientes 24/7** de una forma muy fácil y menos invasiva
- En estos espacios, se pueden **descubrir nuevos hábitos** en construcción y momentos de consumo/uso que no esperábamos
- Y entendiendo los nuevos hábitos que se van formando hoy, es **más fácil desarrollar estrategias para mañana**

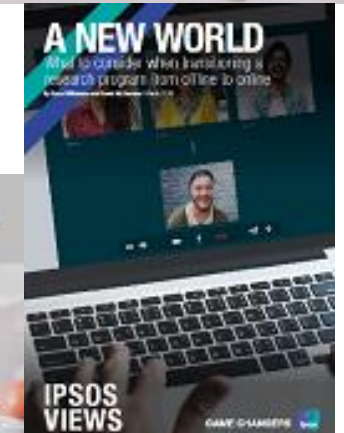


POR EJEMPLO, TENIENDO ESPACIOS DE CONVERSACIÓN GRUPALES O UNO A UNO CON NUESTROS CONSUMIDORES **TODO EL TIEMPO.** NO ES TAN DIFÍCIL 😊



ALGUNAS FORMAS DE ENCONTRAR **SEÑALES:** BUSQUEMOS **INSPIRACIÓN** EN OTROS MERCADOS

- Estamos en un momento donde **queremos reinventarnos** y cambiar nuestra oferta y hasta nuestros modelos de negocio
- Nos cuesta pensar en nuevas ideas si seguimos con la mirada puesta **en las mismas necesidades** y el mismo mercado
- Entonces, ayuda muchísimo **mirar otros mercados e inspirarnos** con lo que está pasando en otro contexto y aterrizar esa inspiración en acciones locales



POR EJEMPLO, CONVERSEMOS CON EXPERTOS Y EXPERTAS QUE NOS DEN UN PANTALLAZO DE LOS CONSUMIDORES DE **MERCADOS REFERENTES**



EN RESUMEN

- 1 YA SABEMOS QUE EL FUTURO NO SOLO APARECE, SE VA CONSTRUYENDO DE A POCOS
- 2 HOY YA SE ESTÁN EVIDENCIANDO ALGUNAS SEÑALES DE CAMBIO QUE MARCARÁN LO QUE PASARÁ DESPUÉS DEL CONFINAMIENTO
- 3 ESTÁ EN NUESTRAS MANOS DETECTAR ESTAS SEÑALES A TIEMPO, ENTENDER POR QUÉ SE DAN Y CONVERTIRLAS EN OPORTUNIDADES

THANK YOU

Q&A

GAME CHANGERS

