



RECALCULANDO...

TRENDING INNOVATIONS

PRESENTADO POR:

ROSARIO MELLADO – Client Officer Ipsos Perú
VIRGINIA WEIL – Innovation Global Leader
ANDREA SALAZAR – Innovation Leader Ipsos Perú

GAME CHANGERS



CONTENIDO

1. Contexto
2. Activating Trends
3. Una mirada local

GAME CHANGERS



CONTEXTO

1

Rosario Mellado
Client Officer
Ipsos Perú

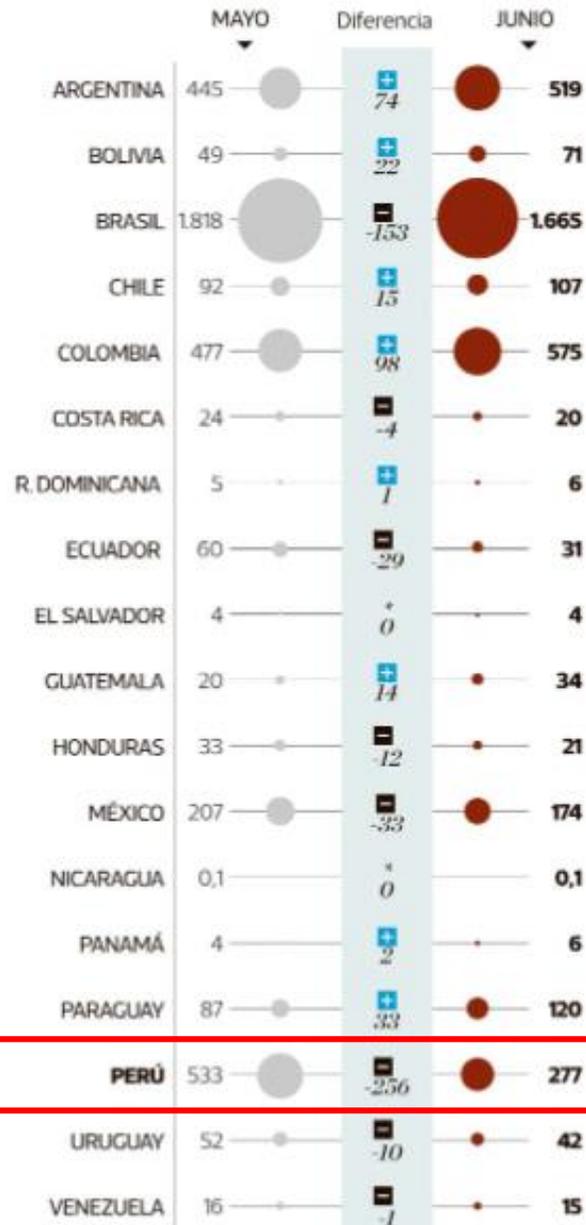


El contexto:

La oportunidad en innovación considera:

- **Influencia de la coyuntura política y sanitaria**
- **El regreso gradual a la normalidad, pero con cambios**
- **Emprendimiento e innovación**

INESTABILIDAD POLÍTICA, PERO PANORAMA SANITARIO FAVORABLE



COVID-19: Perú es el país con la mayor reducción de muertes diarias en Latinoamérica

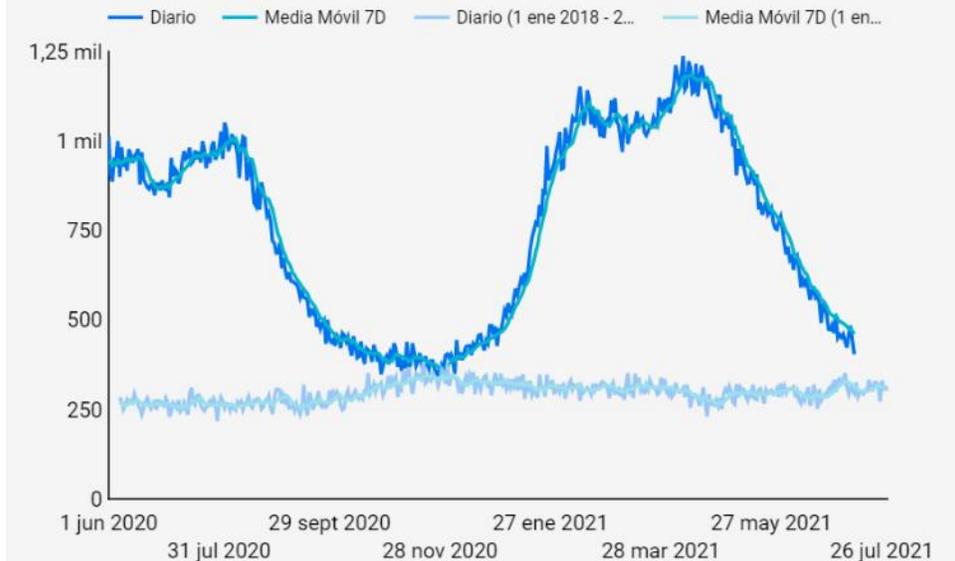
También ha reducido las cifras de casos confirmados diarios entre mayo y junio, mientras aumenta la cantidad de vacunas brindadas en el día. Aparte de Perú, otros siete países de la región han logrado reducir las muertes y contagios diarios.



El mandatario reveló que también están en coordinaciones con el laboratorio alemán CureVac para asegurar más dosis de vacunas contra el COVID-19. (Foto: Presidencia)

Más de 10 millones de vacunas aplicadas

FALLECIDOS REPORTADOS POR EL SINAEF



Base: Total de entrevistados (1,000)
Próximos 3 meses, ósea de Set20 a Dic20

A woman with long brown hair, wearing a light blue surgical face mask and a dark coat, is looking down at her smartphone. She is standing outdoors during sunset or sunrise, with a warm, golden light illuminating the scene. The background is blurred, showing a street and some buildings.

**ESTAMOS LISTOS PARA IR
VOLVIENDO GRADUALMENTE A LA
NORMALIDAD**

LA DIGITALIZACIÓN ES UN ACELERADOR DEL CAMBIO

Adopción agresiva del e-commerce

80%

Se conectan a internet al menos una vez por semana*

54% 7 o más veces a la semana



44%

Compró online en el último año*

6 millones de compradores

+24% (Mar-Jul)*
90% recomprará*

* De la población entre 16 y 70 años de los niveles ABCD del Perú Urbano

Fuente: Ipsos, Comprador en Línea, Junio 2020

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ECOMMERCE EN EL PERÚ MOVIÓ US\$ 6,000 MILLONES EN EL 2020

50%

crecimiento del
ecommerce en el 2020

- COVID-19 ha acelerado el comercio electrónico de 5 años en solo 6 meses
- Mayor crecimiento: retail (250%)
- Participación de 35% en el consumo con tarjetas (antes de la pandemia solo representaba el 12.5%).



El 90% está concentrado en Lima

Fuente: Observatorio Ecommerce 2020 CAPECE

ENTRE LOS BANCARIZADOS, EL USO DE LOS CANALES DIGITALES YA SUPERA A LOS PRESENCIALES



79%
Cajero
automático



57%
Banca
móvil (app)



52%
Banca por
internet



46%
Ventanilla



44%
Apps
transferencia



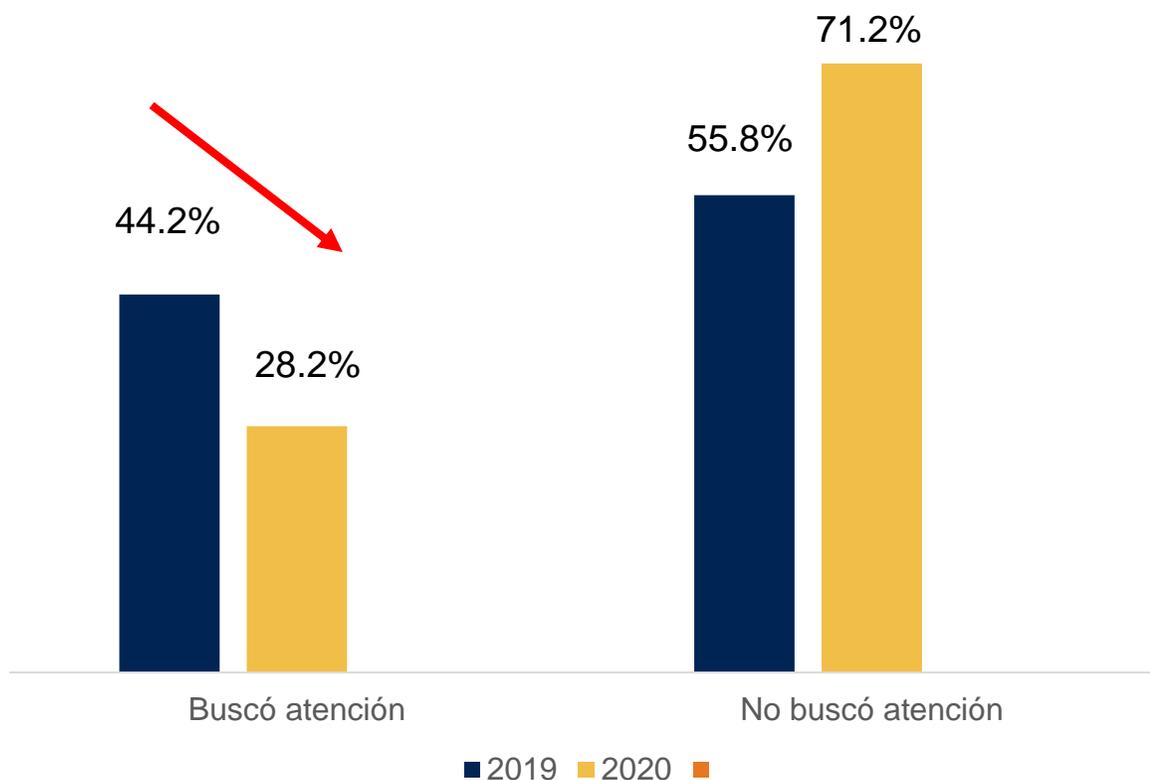
38%
Agentes
autorizados



18%
Banca por
teléfono

EL C19 AFECTÓ LA ATENCIÓN PRESENCIAL, PERO INCREMENTÓ NOTABLEMENTE LA TELEMEDICINA

Asistencia a centros de salud de población con algún problema de salud crónica



Atenciones por telemedicina que realizó el MINSA



2019

29,794

2020

14'013,689



Fuente 2019: Centro Nacional de Telemedicina (CENATE)

Fuente 2020: Nota de prensa Ministerio de Salud 31 de diciembre 2020

Fuente: Informe Condiciones de vida en el Perú
Diciembre del 2020 (Resultados 2020 preliminares) - INEI

LA PANDEMIA AGRANDÓ LA BRECHA EDUCATIVA EN EL PERÚ

45%

de estudiantes escolares dejaron de participar en las clases remotas, principalmente por problemas de conectividad

110,405

alumnos de educación básica regular se trasladaron de escuelas privadas a públicas

174,000

estudiantes dejaron la universidad en el 2020

El Comercio: Educación Pública en Crisis 2020 / Colegio de Profesores del Perú (CPP) / MINEDU.

© Ipsos | Presentación





53%

**Está llevando
clases online**
(67% de 18 a 24 años)

PERO SE ABREN NUEVAS OPORTUNIDADES PARA LA EDUCACIÓN

Interesado en estudiar algún curso / taller

41%

Interesado en estudiar carrera técnica o universitaria con grado

37%

Entre los interesados en estudiar, quieren hacerlo con alguna modalidad online

59%

Ha incrementado su uso de streaming para educación

67%



¿Y CUÁL ES EL FUTURO? EL SECTOR EDUCATIVO TECNOLÓGICO (EDTECH) HA CRECIDO UN PROMEDIO DE **400%** EN EL AÑO DE LA PANDEMIA

- Generación de nuevos medios de aprendizaje.
- Desarrollo de materiales educativos.
- Herramientas B2B para educación de profesionales.
- Plataformas SAAS como entorno de estudiantes.
- Aplicaciones móviles educativas
- Marketplaces de profesores de clases particulares.
- Aprender idiomas online
- Plataformas de cursos online.
- MOOC (massive open online courses)

crehana 

 **DevCode**

 **Laboratoria** 

check 

SOLVI 

 **Queestudiar.la**


wabu

O R A C K
T H E
O O D E .

NETZUN

 **silabuz.com**

Fuente Diario El Peruano – 19/02/2021

HAY UN CAMBIO DE DINÁMICA Y ROLES EN EL HOGAR

14%

**Está haciendo
teletrabajo en casa**

(42% NSE A, 26% NSE B)

9%

**En casa trabajando en
un emprendimiento**

EL EMPRENDIMIENTO COMPENSA EL DESEMPLEO

189,980

incremento neto de empresas en Perú en el 2020.

45,467 cerradas

235,447 nuevas

60%

de las empresas creadas en el último
trimestre del 2020 son unipersonales



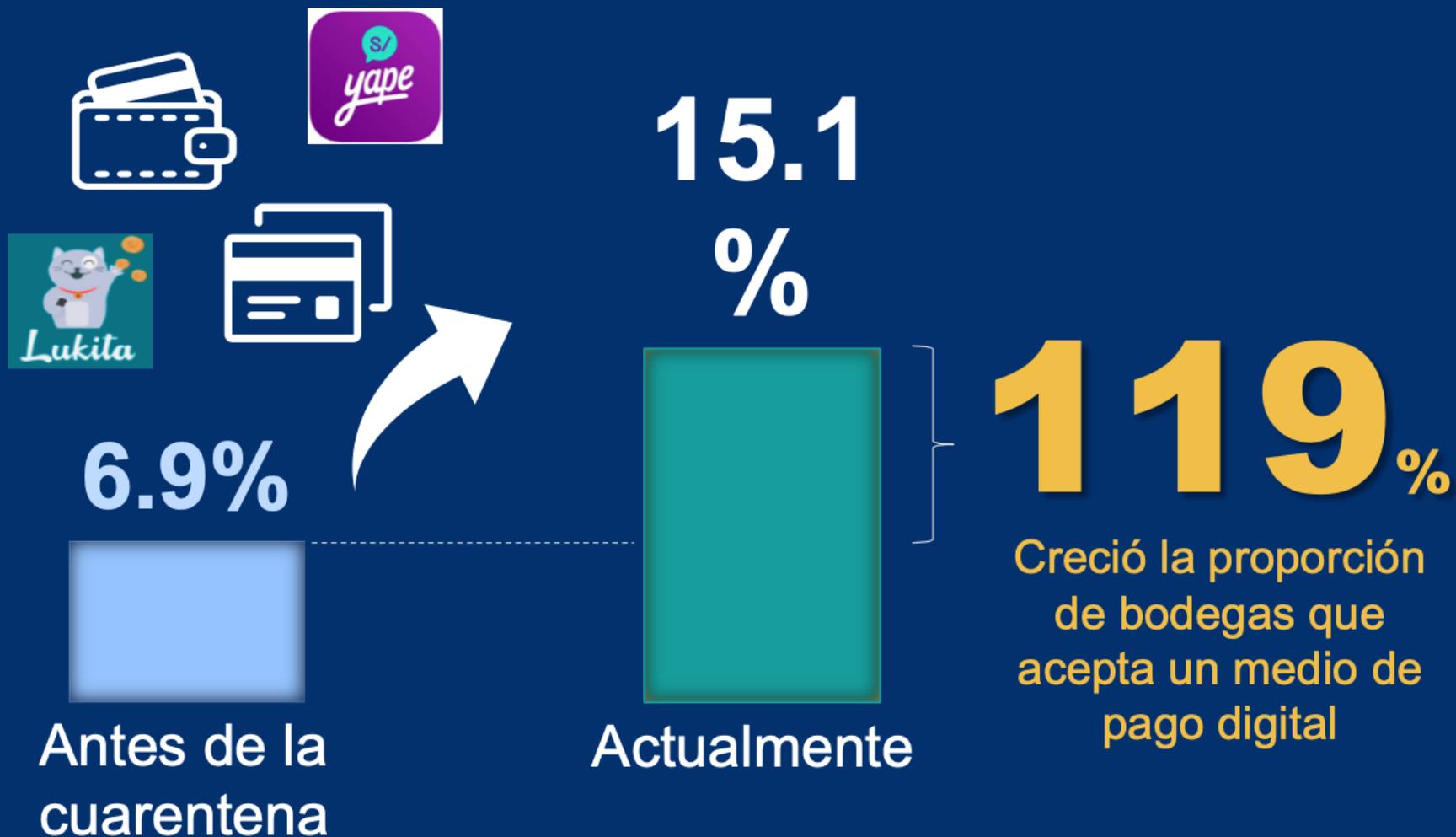


260,000

Comercios ya venden por el canal online (5%)
Cuatro veces más que antes de la pandemia
(65,800)

Acepta en la bodega medios de pago digital

(incluye: pago con tarjetas de crédito o débito, Yape, Plin, Lukita, Tunki, etc.)



Base: Total de entrevistados (502)



La digitalización también alcanza a los minoristas, incluso en canal tradicional



**El contexto para el resto del 2021,
aunque todavía incierto, presenta
oportunidades para que las marcas
propongan innovación e incrementen la
preferencia**

ACTIVATING TRENDS

2

Virginia Weil
Innovation Global Leader
Ipsos



ACTIVATING TRENDS

Build the Future

14 March, 2021

GAME CHANGERS





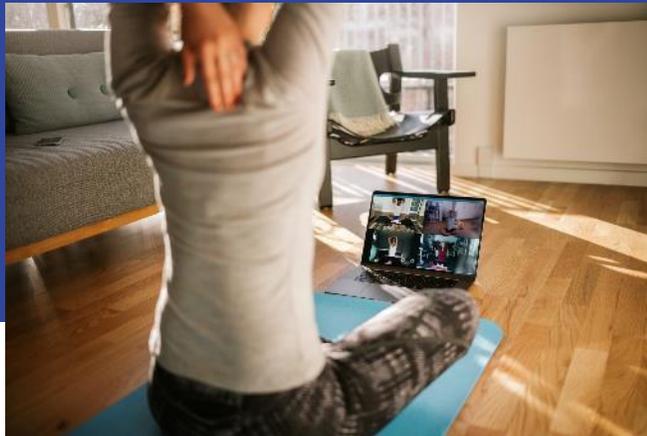
Today every sector is being disrupted. People are ***moving away from old habits*** and making different choices.

Awareness of trends is of course important but knowing how to translate this knowledge into commercial propositions and actions that drive profitable growth is key.



What does
it take to
activate a
trend?

BUILDING THE



HEALTH & WELLNESS

Increased concerns about physical health + emotional wellbeing



SUSTAINABILITY

Interest in sustainable products that care for the planet



DIGITAL SERVICES

Connected services that improve the quality of life



HEALTH & WELLNESS

Health & wellness can be achieved in many ways including exercise, mental wellbeing and of course the food and beverages we consume.

Today we will focus on *food & beverages*, specifically **functional foods**.

FUNCTIONAL FOODS

Foods or food components that may provide benefits *beyond basic nutrition*

Using Ipsos's vast innovation database we analyzed **15,000+ respondents** first impressions of functional food and beverage innovations across **18 countries**

We found consumers' first impressions in this area are granular and specific in terms of both...



Desired Benefits



Ingredients



This reflects how the market has changed from general better-for-you products to products with more specific functional benefits based on personal needs.

Source: Ipsos Innovation Database

DESIRED BENEFITS: WHAT ARE CONSUMERS LOOKING FOR?

Health and wellness priorities:



US

1. **Sleep better**
2. **Immunity boost**
3. **Weight management**
4. Prevent cancer
5. Stress relief
6. Reduce inflammation
7. Cardiovascular health
8. Energy and strength
9. Memory and cognition
10. Removes toxins from my body
11. Digestive health
12. Brain power
13. *Strong bones*
14. Anti-aging
15. Younger looking skin



Mexico

1. **Immunity boost**
2. **Prevent cancer**
3. **Sleep better**
4. Removes toxins from my body
5. Brain power
6. Energy and strength
7. Weight management
8. Cardiovascular health
9. *Respiratory health*
10. Memory and cognition
11. Digestive health
12. *Blood sugar*
13. Younger looking skin
14. *Sexual health*
15. Stress relief

Question: You will be presented with a series of pairs of product features. These product features are all related to food and beverage products. For each pair you see, simply select which one is more appealing to you. Remember, please try to make your choice as quickly as possible.

Source: Ipsos Digital Study conducted in April 2021 – US and Mexico

INGREDIENTS MATTER

What makes something healthy?

Benefits must be supported with a reason to believe:



Presence of positives:

All natural, vitamins & minerals, protein, plant-based (e.g., soy, oat, whey), fruit & vegetables, calcium, probiotics, antioxidants, fiber



Absence of negatives:

No Additives, No Sugar, Low calories



How food is grown:

Organic, ethically sourced, locally grown, Fair trade





SUSTAINABILITY



79% agreed

Will seek out products which are better for the environment

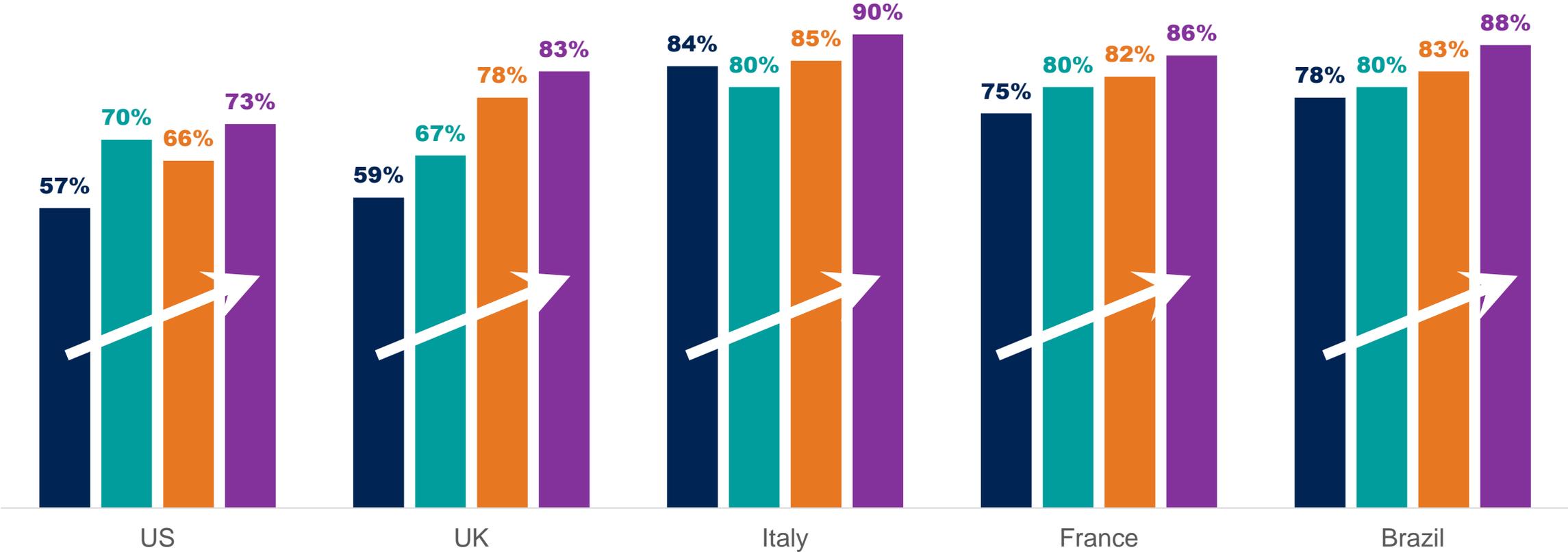
Question: I will seek out products which are better for the environment (% agree)

Base: 19515 online adults under the age of 75 across 28 countries. Fieldwork dates: April 16-19 2020

THE PANDEMIC HAS NOT LESSENERD PEOPLE'S CONCERN

Q. We are heading for environmental disaster unless we change our habits quickly (% agree)

2013 2016 2019 2020

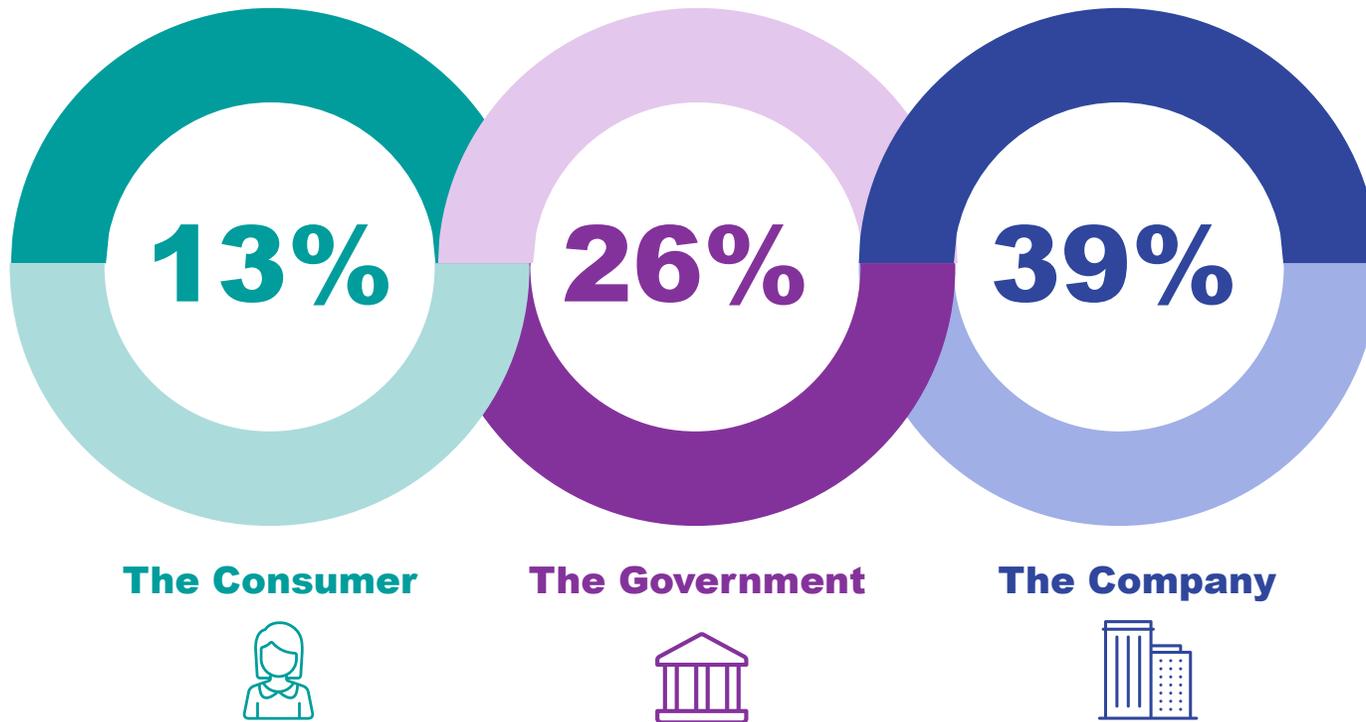


Source: Ipsos Global Trends survey, September 2020. Base: 1000 respondents in each market.

CONSUMERS ARE PART OF THE SOLUTION BUT ABOVE ALL, IT'S ON THE COMPANY

Where does responsibility lie?

Q. Who, if anyone, do you think is responsible for ensuring consumer products are environmentally and socially responsible?



[A further 22% were unable to provide an answer indicating lack of knowledge, interest or engagement in the subject]

Source: Ipsos research among c. 1000 adults in each market: US, UK and France, Q2 2019



68% say

that if businesses do not act now to combat climate change then they are failing their employees and customers.

THERE'S AN OPPORTUNITY TO BUILD CONSUMER LOYALTY

Brands that are considered to act sustainably are rewarded with higher favourability

	Age 18-34	Age 35+
I felt much more favorably about the brand	27%	16%
I felt slightly more favorably about the brand	21%	16%
Did not change my impression of the brand	36%	47%
I felt slightly less favorably about the brand	5%	3%
I felt much less favorably about the brand	3%	5%
I did not know about this announcement until now	9%	12%

Base: 1,310 online, US, November 2018



Starbucks Coffee @Starbucks · 3h
 We're removing plastic straws in our stores globally by 2020—reducing more than 1 billion plastic straws per year from our stores.



New strawless lids to replace plastic straws
news.starbucks.com

But solutions needs to be tangible and easy to understand to effectively cut through. **Don't over complicate it!**



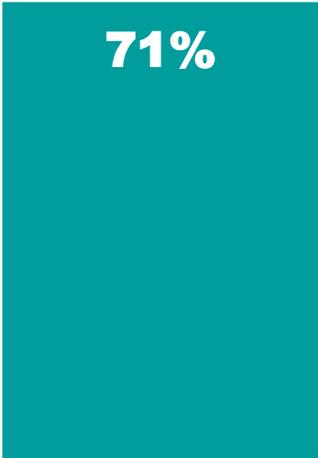
Example of tangible plastic reduction by using carton multi-pack holders instead of plastic



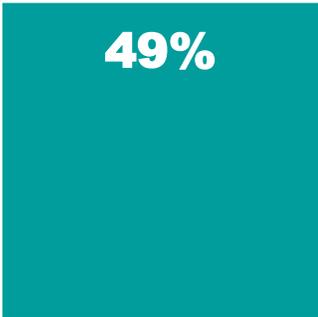
COMPANIES HAVE A RESPONSIBILITY TO CLOSE THE SAY-DO GAP: THEY MUST FIGURE OUT HOW TO OFFER CONSUMERS THE OPPORTUNITY TO ACT ON THEIR DESIRE

Less is more right?

People **say** they are ready for change



The majority of US consumers (71%) agree they want to buy products with as **little packaging as possible...**



...but only 49% would be willing to **change their regular shopping habits** to do so.

...and at higher price points there is no effect on trial



Base: 19,519 online adults aged 16-74 across 27 countries July 26 – August 9 2019



IT'S NOT A KEY DRIVER OF CHOICE

Q. When comparing household products of similar quality and features, which two of the following are most important to you when making a final purchase decision?

Products are offered at a **lower price** enabling me to save

47%

Products are made in **my country**

42%

That products that are packaged using **hygienic packaging**

29%

Products come in **eco-friendly** packaging

24%

Base: Global Results (16 Countries); May 10 To 14

Because other things matter more

Analysis of sustainability claims has shown that they are not as motivating compared to **Efficacy** and **Quality of Life**.

This does not mean they aren't important, but relative to other product benefits they *are not as high a priority* for consumers.



BRANDS MUST SERVE AS CUSTODIANS OF BEHAVIOUR CHANGE

To address changing attitudes, strengthen brand image and stand out from the crowd



UNDERSTAND:

What is truly important to your target stakeholders/consumers and what are they likely to act upon? Don't try to be all things to all people



ENABLE:

Seek the path of least trade-offs for consumers so they can act on their desire to do good without sacrifice



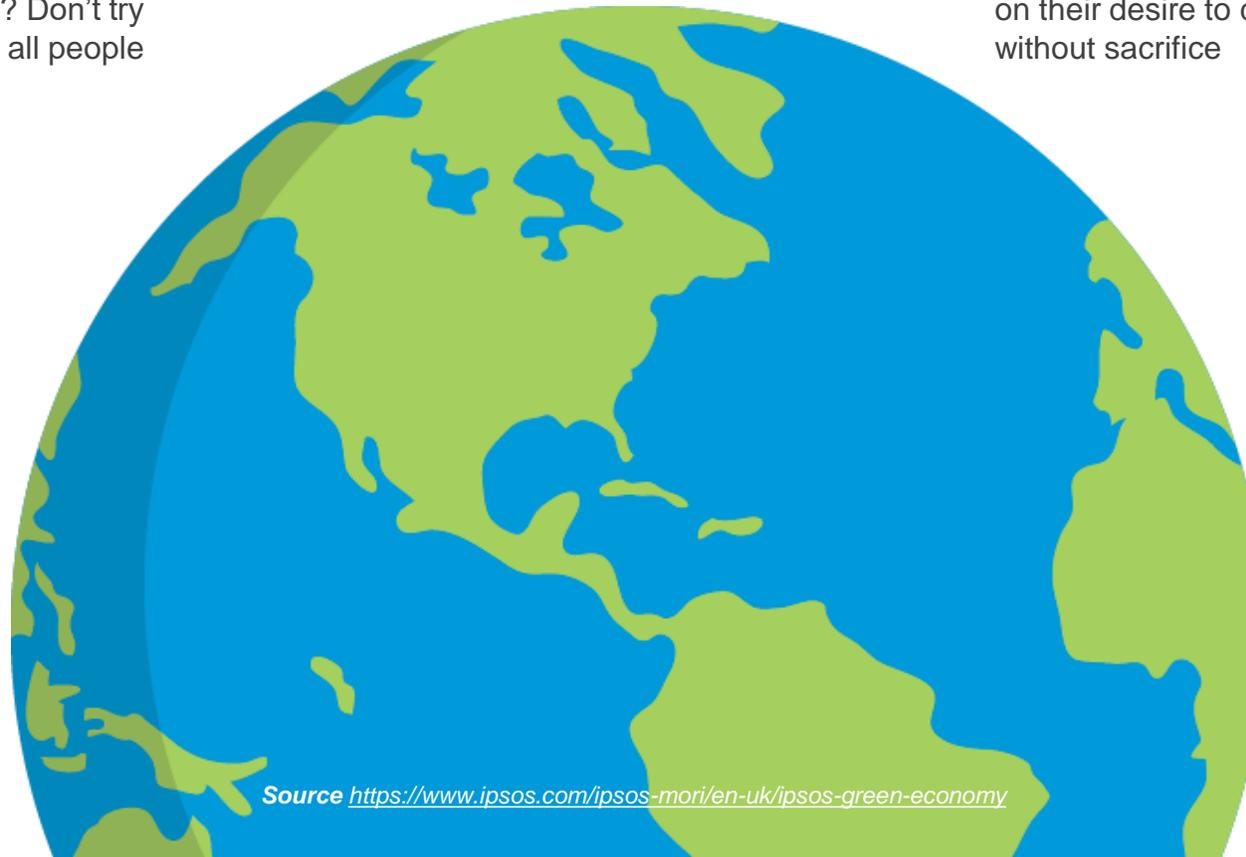
ASSESS:

Assess current impact your 'business as usual' model is having on the environment before innovating. What value does your business bring to the world?



COMMIT:

When implementing a new strategy, emphasis should be on initiatives that your business can commit to in the long-term.



Source <https://www.ipsos.com/ipsos-mori/en-uk/ipsos-green-economy>



DIGITAL SERVICES

Is technology what people want to buy?

3 KEY DRIVERS OF BEHAVIOR CHANGE





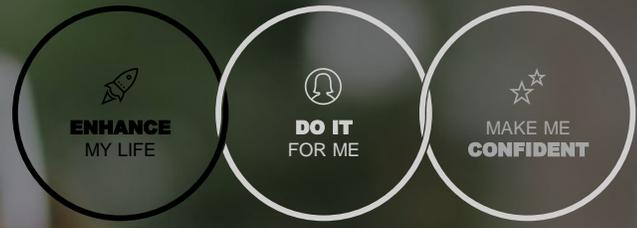
Allow me to focus on my priorities.



Does the proposition remove friction from a current process?

- Simplifies my life
- Make it easy
- Be warm, Be authentic, Be human
- Not too clinical, don't lead with fear







Not just information, solutions.

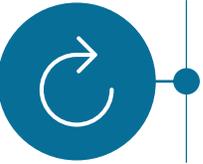


Does the proposition solve the need/desire beyond providing diagnostics?

- I am taken care of
- Convenience
- Discovery, Customization and Consolidation – present it intuitively



THERMOSTAT THAT CHANGES TEMPERATURE BASED ON YOUR ROUTINE .



The Nest Learning Thermostat is an electronic, programmable, and self-learning Wi-Fi-enabled thermostat that optimizes heating and cooling of homes and businesses to conserve energy.

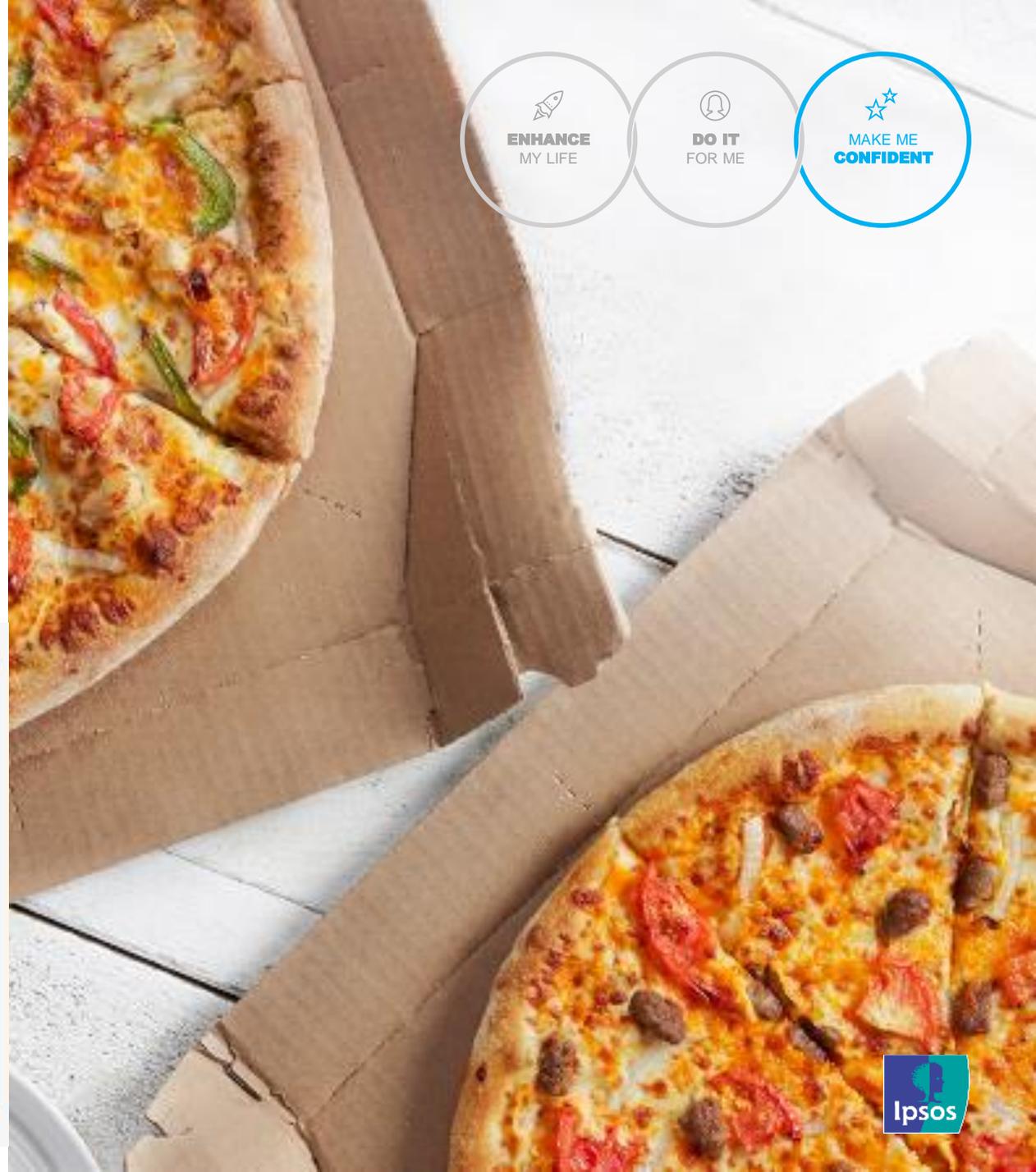
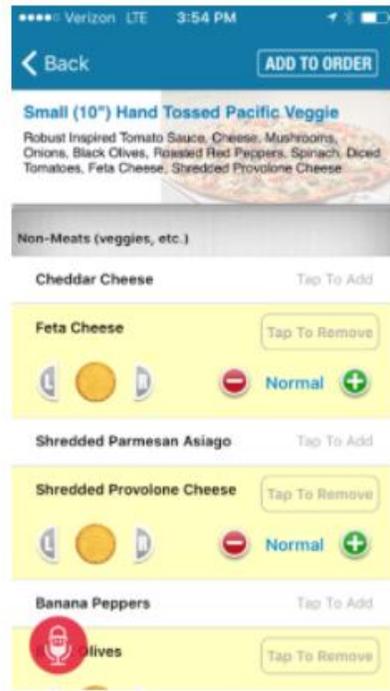
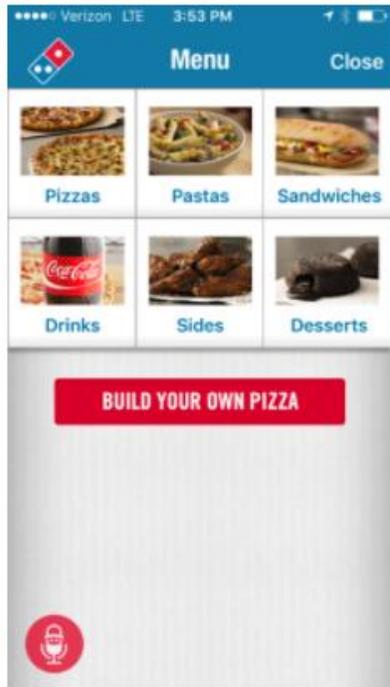
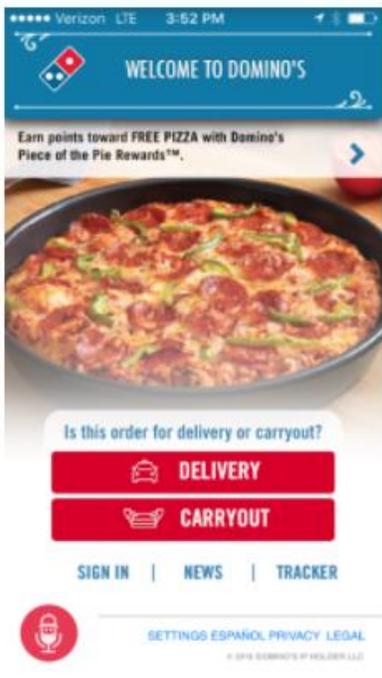


Remove potential for error, show me the process.



Does the design inspire confidence through control?

- Remove potential for human error
- Reassurance
- Let me see the process



PIZZA TRACKER

You got 30 minutes and you got Domino's Pizza headed your way. Our delivery experts have specifically engineered the Pizza Tracker to keep you up to date on the status of your order from the moment it's prepared to the second it leaves our store. You got tracking where tracking has never gone before.



YOU GOT ORDER ASSEMBLY - YOUR ORDER WAS BOXED FOR DELIVERY AT 12:37 PM (PATENT PENDING)

YOUR LOCAL STORE:

Contact your Domino's with any questions:

2282 South Main Street
Ann Arbor, MI 48103
734-332-1111

YOUR ORDER DETAILS:

- (1) Small (10") Hand Tossed Pizza
Extra Cheese, Sauce, Pepperoni, Italian Sausage
- (1) Chicken Kickers
- (1) 2-Liter Coke

RATE YOUR DOMINO'S

When your pizza arrives tell us how it was.
(RATE OUR SERVICE FROM 1-5)



STORE AVERAGE: ★★★★★ LEAVE US A MESSAGE



WHAT CAN YOU DO TODAY?



Health & Wellness:

Consumers are increasingly expecting more from foods and beverages. Important to understand consumers health and wellness needs and provide clear and differentiated solutions supported by reasons to believe.



Sustainability:

Corporations need to provide sustainable options with the same quality and price that make it easy for consumers to do the right thing.



Digital solutions:

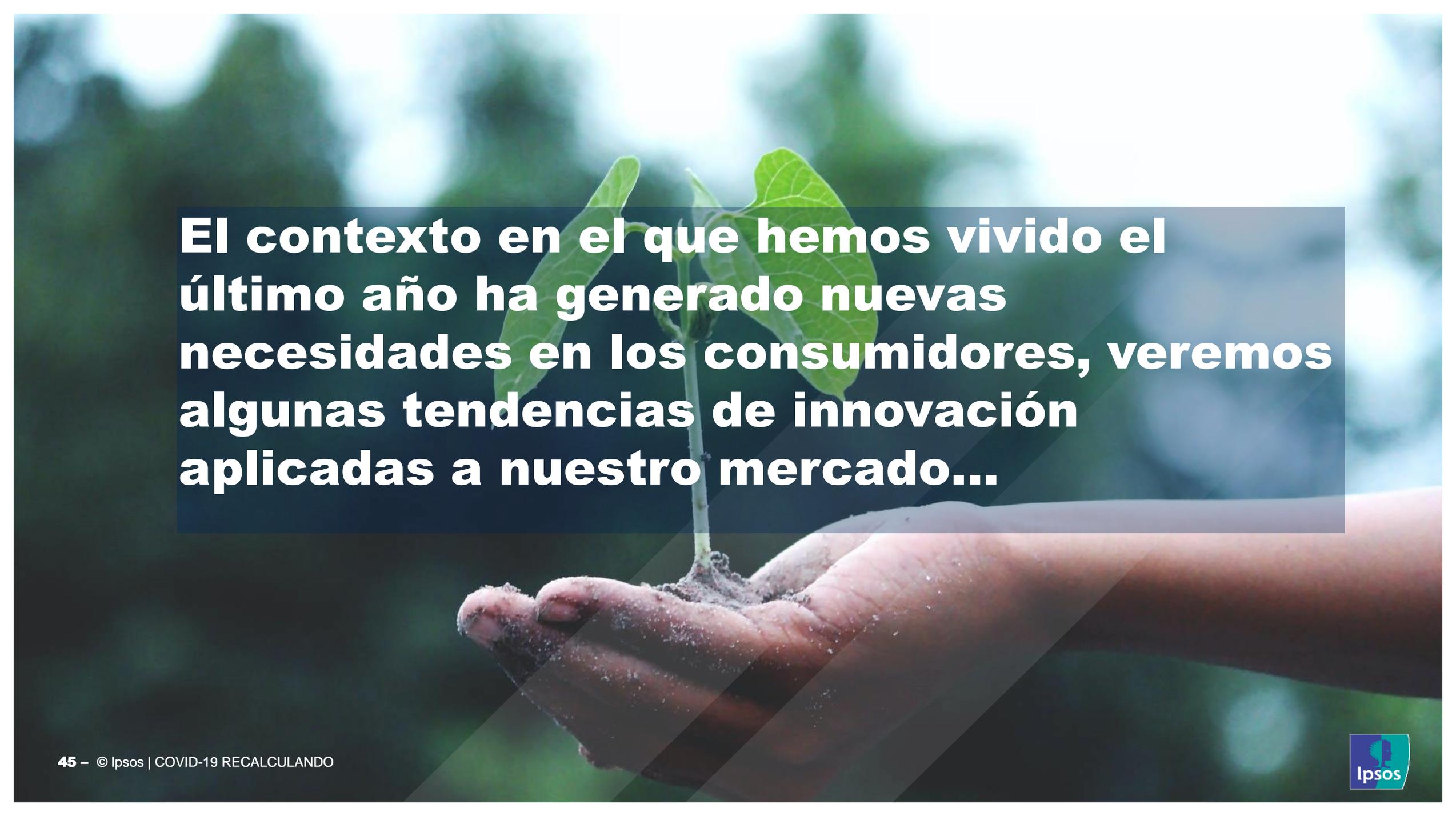
Technology should be an enabler not the solution itself. Keep benefits top of mind. People don't want technology for the sake of technology. They want solutions that make enhance their lives.

ACTIVANDO ESTAS TENDENCIAS EN NUESTRO MERCADO

3

Andrea Salazar
Innovation Director
Ipsos Perú



A close-up photograph of a person's hand holding a small, vibrant green seedling with two leaves and a small amount of dark soil. The background is a soft-focus green, suggesting an outdoor setting. The text is overlaid on a semi-transparent dark blue rectangle in the center of the image.

El contexto en el que hemos vivido el último año ha generado nuevas necesidades en los consumidores, veremos algunas tendencias de innovación aplicadas a nuestro mercado...

Hot topics:

- **Salud y Bienestar**
 - **Sostenibilidad**
- **Servicios Digitales**



Salud y Bienestar

Alimentos Funcionales: La importancia de los ingredientes



Tendencia: Salud y Bienestar

Alimentos Funcionales



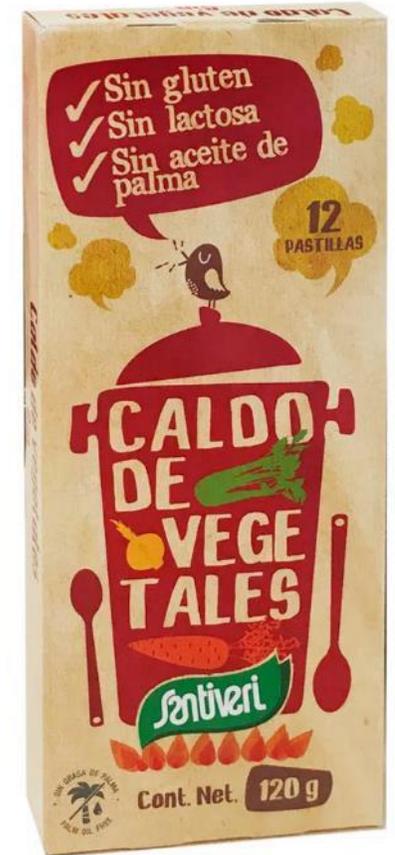
Presencia de ingredientes positivos



Tendencia: Salud y Bienestar Alimentos Funcionales



Ausencia de negativos



Tendencia: Salud y Bienestar

Alimentos Funcionales



Como se cultivan los alimentos



Sostenibilidad

Para construir lealtad



Tendencia: Sostenibilidad

A puesta a mediano plazo, soluciones fáciles de entender, que no impacten el precio



Servicios Digitales

Para facilitar / mejorar sus vidas

Tendencia: Servicios Digitales Prende

Prende

Clases en vivo por zoom de lo que les **apasiona**

Regístrate hoy totalmente gratis y accede a más de **350** cursos todas las semanas: magia, astronomía, minecraft, baile, ilimitado.



¡Bloques y colores!
Construyendo con LEGO

8 - 10 años ★ 4.9

39 reseñas

Ver más



¡Estrellas Pop! Canta
conmigo

11 - 15 años ★ 4.9

559 reseñas

Ver más



Photopea: Tu mejor
aliado para editar fotos

11 - 15 años ★ 4.8

362 reseñas

Ver más



¡Tiktokmanía! Baila al
ritmo de Tik Tok

8 - 10 años ★ 4.9

256 reseñas

Ver más



¡Arteterapia Gestalt!
Expresándonos mediante
el arte

4 - 7 años ★ 4.8

98 reseñas

Ver más



¡Brochas, paletas y
colores! Automaquillaje
Glam

11 - 15 años ★ 4.9



¡Laboratorio creativo!
Técnicas de dibujo y
pintura

8 - 10 años ★ 4.8



¡Konishiwa Kawaii!,
bordando con estilo

8 - 10 años ★ 4.8



Aprendo sobre mí y mis
emociones

11 - 15 años ★ 4.7



¡Quiero ser Youtuber!
¿Cómo empiezo?

8 - 10 años ★ 4.8



Tendencia: Servicios Digitales Smart Dr



REALIZA UNA TELECONSULTA y resuelve todas tus dudas.

Google Play



Conéctate con un médico certificado estés donde estés.

Ahora, tu salud está en tus manos.

Te conectamos con los mejores especialistas, estés donde estés.

Login con Facebook

Login con Gmail

Estoy de acuerdo con los [Términos y Condiciones](#).

Acepto el tratamiento de mis datos por Smart Doctor

11:13 72%

Conversa con un médico

Smart Doctor no resuelve emergencias

Lista de médicos

- Christian Rivera**
Medicina Interna
Adultos
- Matilde González**
Psiquiatría
Niños y adultos
- Mayra Castillo**
Medicina - Hematología
Adultos
- Sergio Vargas**
Pediatria

Tendencia: Servicios Digitales

JOKR

En tu puerta
EN SOLO
15
MINUTOS

Somos la opción más rápida

JOKR
EN 15 MIN

Pilsen

18:34

JOKR

Entregar en mi dirección Dentro de 15 min

Bebidas

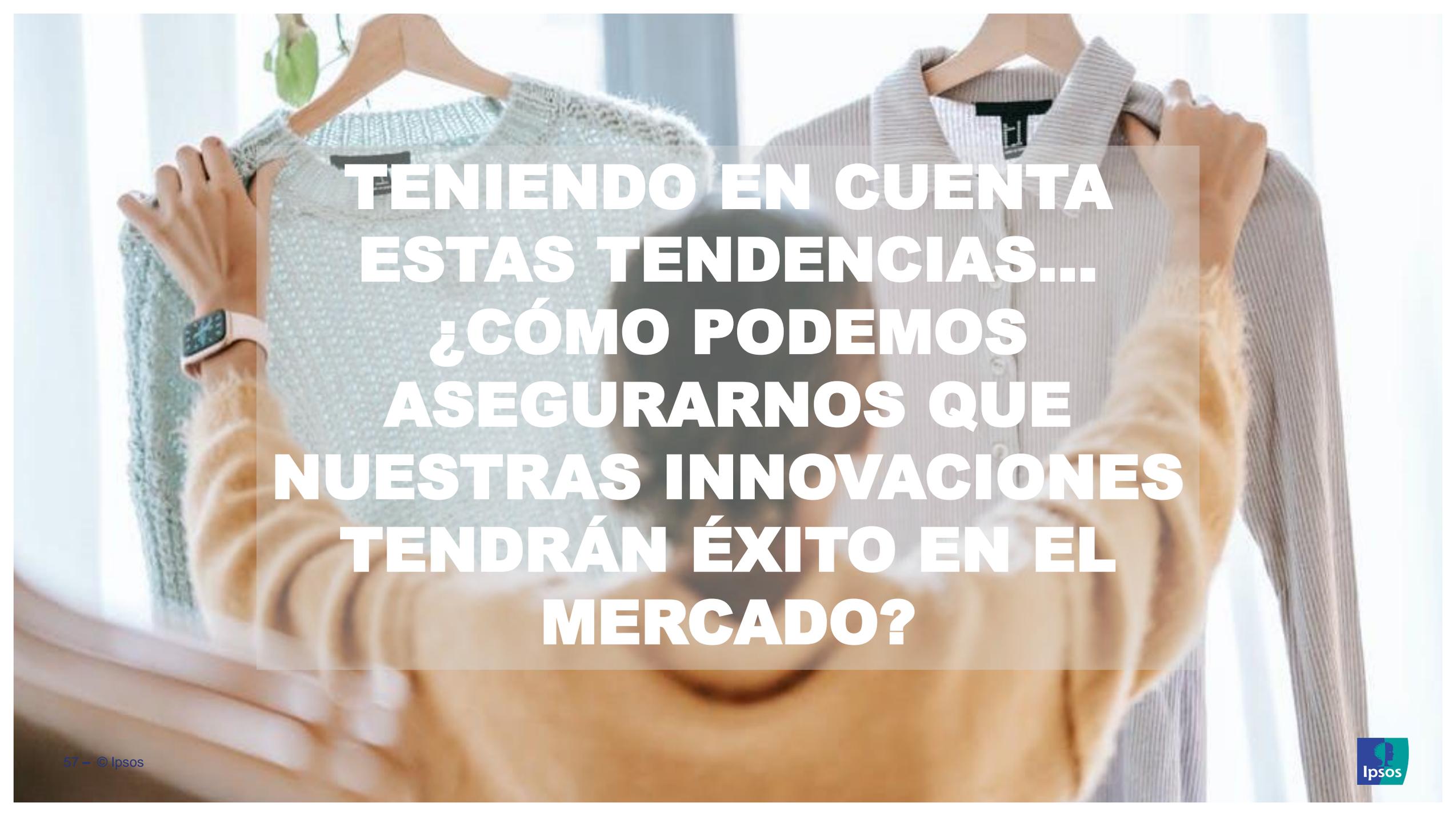
SixPack a \$/5

Tecnología

Botanas

Pide en la App

The advertisement features a smartphone displaying the JOKR app interface. The app shows a delivery time of 'Dentro de 15 min' and a shopping cart with 6 items. The main background is a vibrant green with a large Pilsen beer bottle. A blue arrow points from the text 'Pide en la App' to the app interface on the phone. The JOKR logo is prominently displayed at the top left and on the delivery person's uniform.

A person wearing a beige sweater is looking at two sweaters hanging on a wooden rack. The sweater on the left is light blue with a white pattern, and the one on the right is grey with a white pattern. The person's hands are visible, one holding the top of the grey sweater. The background is a bright window with light curtains.

**TENIENDO EN CUENTA
ESTAS TENDENCIAS...
¿CÓMO PODEMOS
ASEGURARNOS QUE
NUESTRAS INNOVACIONES
TENDRÁN ÉXITO EN EL
MERCADO?**

COMO CONSUMIDORES PONEMOS EN UNA BALANZA LO QUE PERDEMOS Y LO QUE GANAMOS CUANDO PENSAMOS EN ADOPTAR UN NUEVO PRODUCTO O SERVICIO

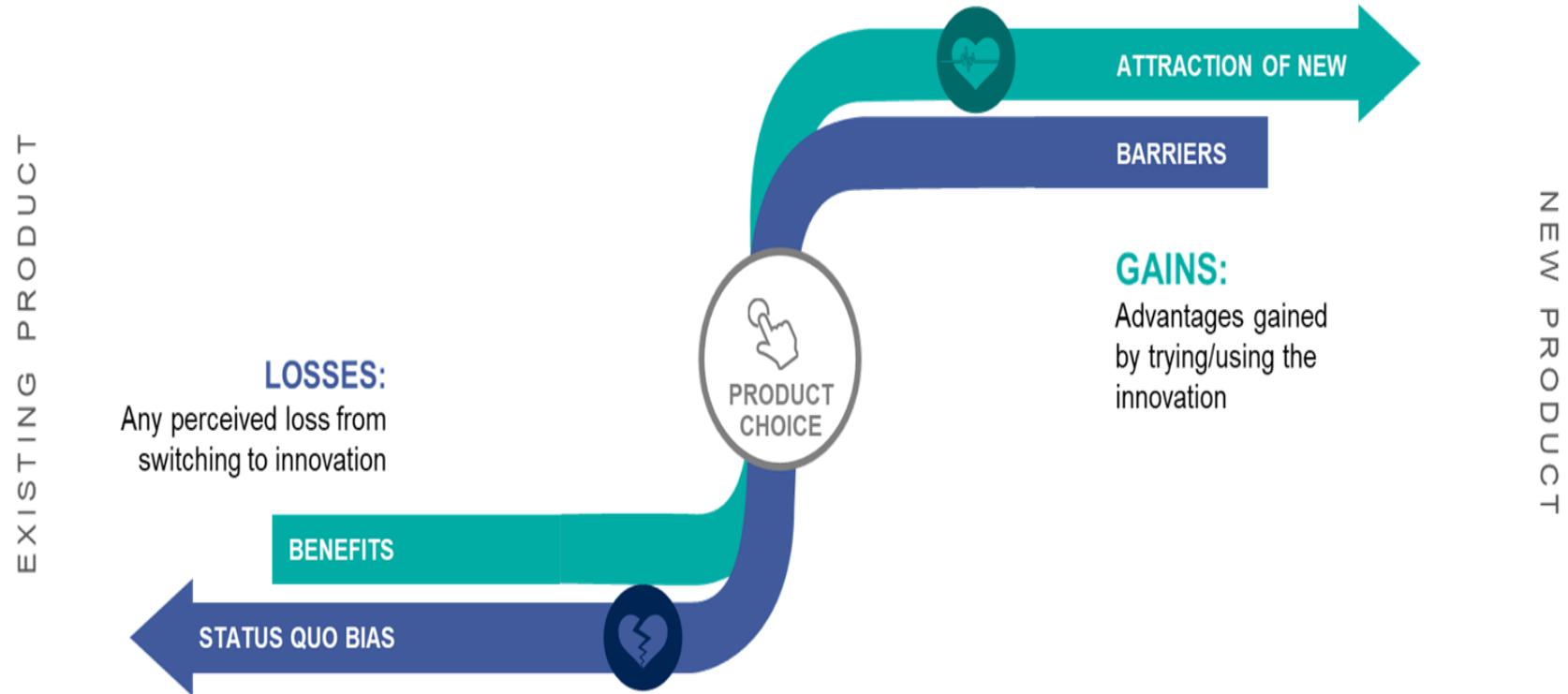
Prospect Theory

Los consumidores evaluamos las innovaciones en relación a los productos que consumimos actualmente.

La PÉRDIDA percibida al cambiar a un nuevo producto tiene un impacto mayor que la GANANCIA percibida.

Status Quo Bias

El hábito es fuerte. Cualquier cambio del statu quo a menudo se considera una PÉRDIDA. Los consumidores tienen una fuerte tendencia a no querer cambiar.



GRACIAS

GAME CHANGERS



¿PREGUNTAS?