COLOMBIA 2021
BUILDING ON DIVERSITY

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GAME CHANGERS

COLOMBIA 2021
BUILDING ON DIVERSITY

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FORWARD

Henri Wallard
Ipsos Deputy CEO

Our last edition of Flair in Colombia was published in 2017, shortly after the historic agreement signed between The Revolutionary Armed Forces of Colombia (FARC) and the Colombian government. It marked the end of 53 years of conflict and opened new perspectives. After many years of unrest, Colombia is a promising country for investors and shows strong dynamism towards innovation, illustrated for instance by the “Vive Digital” plan on digital innovation but also offering positive perspectives in many industries, from energy and tourism to telecom and agriculture. The examples of smart transport in Bogota and the Centre of the Fourth Industrial Revolution in Medellín illustrate this ambition across the country.

We are happy to continue to share our analysis of Colombia through the eyes of Ipsos researchers in the country in the Ipsos Flair collection.

Despite a challenging environment marked by the Covid-19 crisis and tensions with dissident groups, the ambition of Flair hasn’t changed. It is an international publication that analyses the values and attitudes of consumers and citizens to provide substantial analysis and recommend the best strategies for decision-makers.

Flair is about instinct and intuition, the ability to capture the atmosphere of a country, to perceive the right direction, to know when to act. At Ipsos we believe our clients need more than a data supplier. They need a partner who can produce accurate and relevant information and turn it into actionable truth. This is why our curious and passionate experts not only provide the most precise measurement but shape it to provide true understanding. To do this we use the best of science, technology and know-how. And we apply the principles of security, simplicity, speed and substance to everything we do so that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth: You act better when you are sure.

By bringing together diverse and complementary perspectives, the Ipsos Flair series helps our clients to formulate and to fine tune strategic planning approaches. This publication summarizes the knowledge and experience gained by our research teams in Colombia. It is part of a series of books published by Ipsos around the world: the Ipsos Flair programme.Enjoy your reading!

Enjoy your reading!

EDITORIAL

Yves Bardon
Ipsos Flair Programme Director -
Ipsos Knowledge Centre

Colombia is one of the most creative countries in the world in terms of start-ups, with innovations solving local or international problems. MUVO, for instance, launched in Bogotá, was the first sharing system for electric scooters and bikes in Latin America.

The "Vive Digital" plan is intended to boost innovation, especially in small and medium-sized enterprises; hotels and restaurants are already pioneers in the use of digital technologies and retail is soon expected to follow.

A Colombian engineer created Kiwibot[1], a company delivering meal thanks to robots in San Francisco. Not only does that simplify the lives of customers, but it helps manage the road network: robots are equipped with cameras that provide information on the state of the infrastructures.

Women are stakeholders in this process. Cartier's global competition for women entrepreneurs has nominated the founder and CEO of Agruppa, Carolina Medina, as one of the finalists. Her business, incubated at Wayra (Telefonica Open Future), gathers orders for fruit and vegetables between neighbors in Bogotá so that they can buy directly from farmers.

An article by El Espectador[2] is worth citing, which refers to the study by ESI ThoughtLab "Smart Cities 2025: Building a Sustainable Business and Finance" and mentions Juan Carlos Pinzón, president of ProBogotá. He affirms it is essential that the Colombian government invest in the regulation of new technologies. A delicate point: "It is not only a question of taking into account the speed with which technology evolves: it is also necessary to find the right balance between an excess of regulation (which could slow innovation) and, on the contrary, a lack of regulation (which would betray a hesitation about the future)", illustrated by the appearance of electric bicycles in October 2018.

Medellín is not to be outdone: Colombia wants to be the heart of the "Fourth Industrial Revolution" in Latin America with a first centre inaugurated in April 2019 intended to make it the "capital of science, technology and innovation of South America" by integrating it into a global network funded and managed by the World Economic Forum.

Sergio Naranjo, the Communications Manager of the Centre of the Fourth Industrial Revolution in Medellín, explains that two factors influenced these political decisions. The first is sociological, the second geographical:

"Medellín and its inhabitants have a great power of resilience. As the city became unbearable and the violence daily, they chose to look to the future, to face. We cannot erase the past, but we make it a strength. Medellín is also a city in central Colombia. It is not close to a port or a maritime network. Nor does it have a rail network that can transport industrial goods. From this context was born the idea of making knowledge a tool for economic development. We have chosen to make brains our added value to generate economic growth".

This vision is emblematic of the tension in the heart of Colombia and perfectly echoes the title of this Flair publication: "Building on Diversity"

In our second edition of Flair Colombia in 2017, we wrote: “Colombia is on the right track to become a leading nation in the region. The Peace Agreement creates opportunities to develop road infrastructure, to reactivate agriculture and ecotourism in a country with some of the greatest ecological diversity, and to attract domestic and foreign investment.”

But over three years after the historic peace agreement signed with the FARC, the country is still marked by numerous assassinations, former guerrillas or people from civil society

On the economic front, inflation reached 3.3% in 2019, up from 3.2% in 2018 in a country where social inequalities and precariousness remain hyper-sensitive issues that can put tens of thousands in the street in demonstration. To appease the climate, the government increased the minimum wage by 6% and launched a “National Conversation” inspired by the “Great Debate” in France.

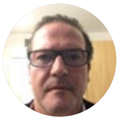
While the country is experiencing unprecedented attractiveness for the international visitors, the themes of diversity and building therefore become more meaningful as Colombia continues to progress.

International tourism is a good indicator of this: according to the magazine *Finance Colombia,* the country had already received 2.8 million tourists in the first half of 2019 with hotels recording records with an average occupancy rate of 57% and revenues up 12% from the previous year; their highest level in the past 14 years.

President Iván Duque wants to make tourism “the new oil” of Colombia and develop in Putumayo, in the south of the country, where terror has reigned for decades (and where violence resurfaces), “one of the great paradises of global ecotourism”.

In 2021, all these technological, social, cultural and economic challenges are at the same time ambitious and fragile. They shape the eyes of consumers as much as the strategies of marketers: they express themselves in all the subjects that you are going to discover in this publication of Colombia Flair.

COLOMBIA BETWEEN PERCEPTIONS AND REALITY



Jean-Christophe Salles
Ipsos Latin-America CEO

I was born in France, but I have been living in Latin America (Argentina and Chile) for more than 15 years, travelling regularly (before Covid-19!) to different countries. Colombia, for me, is distinguished by the differences between its image, perception and reality.

If we ask a European today about images of Colombia, they will undoubtedly talk about terrorism, drugs and insecurity, when Bogotá, for example, is one of the safest cities in Latin America. An enormous amount of work has been done by the different Colombian governments and institutions to restore the country's image, but perceptions are not so easy to change.

To this difference between perception and reality for foreigners, we can also add that of Colombians themselves about their country. A 2017 Ipsos study measured the differences between perception and reality within the same country. Colombia appeared as one of the countries in the world with the biggest gap. Colombians perceived for example a strong increase in crime, when in reality it was decreasing significantly, or estimated a high

percentage of underage girls (14-19 years old) giving birth (44%) when in reality it was only 4%...

After a very difficult year in both 2020 and 2021 due to the Covid-19 crisis what are the concerns of Colombians today? If Covid-19 remains the first concern at the global level, it is today at a very low level in Colombia (12%) and the lowest in Latin America. Colombians have other concerns, above all there are 4 that are almost the highest in the world.

The first is corruption and political or financial scandals; 55% of Colombians in September 2021 say they are concerned about corruption and scandals, the highest in Latin America and the highest in the world (along with South Africa). The second, poverty and social inequality, where Colombia appears as the third country at the global level (behind Hungary and Russia) with 47% and again the highest in Latin America. At the same level is unemployment, fourth country in the world (behind South Africa, Italy and Spain); and then comes crime and violence, sixth country with 36% and this time it's behind 3 Latin American countries (Mexico, Argentina and Chile).

In this context 89% of Colombians think that their country is heading in the wrong direction and 64% state that society is broken, 67% that the country is in decline. Colombia is the country with the highest "broken society" index, according to an Ipsos study, indicating a very low level of trust in all organisations. Only doctors, scientists and teachers have a level of trust higher than 50%, then comes religion, but all governmental and/or public organizations (politicians, government, police, judges, lawyers, civil servants... have a very low level of trust, one of the lowest in the world and in Latin America.

A pessimistic view that contrasts with all the progress made by Colombia in recent years: the growth of a middle class, important advances in educational coverage, one of the most attractive countries in Latin America to do business (Doing Business 2020), a great capacity for innovation and a secure tourism potential.

A pessimistic vision of the citizens that also contrasts with the opinion leaders. For example, when asked how long it will take to recover from the Covid-19 crisis, the majority (54%) of Colombians state that it will take more than 3 years, while public figures/opinion leaders think it will take less than 2 years.

Perceptions are important as they often define behaviour; better educated and more informed citizens are willing to participate more in democratic life, there is significant work in terms of communication and explanation to be done by the institutions. Colombians are still optimistic about the future, more than 70% think that their personal situation will be better in the next 6 months, we just need to support them in this direction!

DIVERSITY AS A MULTIPLIER

Mauricio Sepúlveda
Country Manager for Ipsos in Colombia

We have known for centuries that one of the characteristic features of our beautiful Colombia is its diversity. From primary school they teach us in detail the wide range of climate zones depending on altitude that we have in the national territory, the immeasurable variety of fauna that we are fortunate to host, the infinite universe of flora that adorn our regions, the different races/ethnicities that have lived together historically: indigenous, Creole, black, mestizo, mulatto, white... The many music styles, of course, from all the regions we have, so rich, so prolific, so different, so much so, that phrases have been coined to suggest that in this same country, up to five different countries could easily exist.

That diversity that traverses us from coast to coast, and that bisects us from La Guajira to the Llano and on to the jungles of the Amazon, passing through our triple pronged mountain ranges, has imposed an indelible seal of identification on us that transcends borders and reaches out to the world: the largest number of bird species in the world trill and fly through Colombian skies, attracting a large number of tourists who marvel at such a plethora of wildlife. This is also a challenge that we have not been able to live up to: despite recognizing our differences, we have not been able to add to them; given the amalgam of what we represent, we have not been able to take advantage of our own cohabitation.

The story is relentless and shows us that we have been unable to overcome the differing views of those who do not think the same way as us, and who have a different concept of the country we want to be. A few days ago, I reviewed with my daughter the history of Colombia, and I realized again that our historical thread is a continuous skein of clashes, tumults, fights and wars between those who are essentially diverse.

From the centralist and federalist visions at the dawn of independence, through the intrigues of Bolivarians and the Santanderians, as well as the bloody wars between the Liberals and the Conservatives with Cipriano de Mosquera, Obando, General Melo, Ospina and others, until arriving at Núñez, who somehow managed to unite the radicals and the independents, and take a first step towards the blue hegemony of the early twentieth century, then the red banners were raised after the thirties in the last century. And so similarly on until twenty years after the beginning of the 21st century.

Very rarely as a society have we stopped to think about the contribution to diversity that our ideas about nation-building have also had. We have tended to opt for the resolution of conflicts with weapons rather than the use of arguments and words, when the discussion and exchange of different ideas approach could not only add to but multiply our wellbeing.

The French essayist Joseph Joubert said it clearly: “It is better to discuss an issue without solving it, than to resolve an issue without discussing it”. We have not done so, and so that is what we have. Today we relive what happened in past centuries, all enrolled in opposite paths, with different thoughts that do not allow for the placing of listening at the forefront, in order to build and add to what we have.

And so the following reflection arises: is it that our geography, our diversity, nature itself prevents us; are we so diverse that we can never agree?

The peace process is another example of what I noted, the results of the 2016 referendum once again marked the differences we have as a society. The result was almost like cutting a lemon down the middle, half and half. Different visions, opposite paths, clashing paths. Never a bridge. Just as they told us in the history books.

The implementation of the agreements has divided us even more, it is enough to look at social networks to see the flood of expletives that are launched from right and left; we have not been able to overcome it, so much so that even in our own families or among groups of friends we prefer not to talk about this because conflict can surface.

What a paradox: peace could be breaking us even further apart and it has gotten to the family. This is precisely the challenge of our society in the days in which we live: understanding each other in our diversity.

In Colombia, we are privileged by the geography we have, we are fortunate to have people of every profile: the wealthy businessman who built his emporium in his region, the tireless and loyal worker who seeks to give the best to his family, the ingenious and creative independent worker who makes his livelihood and gets by, the millennial young woman who created her start-up with the investment of her friends, or the sportsman (generally coming from below) who triumphs abroad for everyone's pride, the same is true of the economist vwith strong, international technical training who has supported our institutions, or the social activist who wants equality and protests on behalf of the most vulnerable, and thus the endless examples of those that make up our DIVERSE social network.

But, nevertheless, we have preferred confrontation to the union of ideas, inconceivably we have not realized what a valuable thing the opinion of our neighbour is, of our contradictor; historically we have sought to cancel it out. The typical phrase that says, "together we are more" is well worn, but here in Colombia, due to our characteristics, we must add that "with diversity we can add more", by simple definition, by actual arithmetic, by geographical imposition.

Fortunately, in Ipsos we also have a diversity of vision and tools designed to understand people, societies and markets. Just look at the range of articles that you have had the possibility to read and enjoy, for us it is our pleasure to put these at your disposal and opinion, so that you can see that we are fortunate enough to understand our target audiences from endless angles, which we can utilise to nurture the decisions of partners.

As generators of information and as a bridge between companies, public institutions, the government, citizens and consumers, Ipsos is a market research and opinion company. Our purpose is the provision of knowledge and value, so that a better society can be generated and, fundamentally, we aim to make people happier by enabling them to receive a better designed service, or a new product, or an attractive advertisement, or a better designed public policy.

As people, companies and as a society we have a responsibility today to build in the midst of all this diversity of thoughts, a coming together, we should not try to tear down those who think differently as we have done in the last two hundred years of history, but we should aim to build a better society, that's more just, where we all recognize ourselves as equals with all the differences we have.

History has also shown us the material we are made of, the ability we have to overcome the bloodiest violence, as well as the most devastating natural disasters. We have always overcome all difficulties, with the tenacity of our race and with the impetus of our convictions.

Let's build, understanding our differences, adding to and multiplying ourselves.

We deserve it, our children even more so. Our country will thank us.

Welcome to Colombia Flair 2021.

COLOMBIA FROM ABROAD

Ana Leyva
Chief Growth Officer - Argentina

10% of the Colombian population, more than 4.7 million people, live outside the country. This is not a minor fact, especially when we think that, according to Money magazine the Colombian “diaspora” represents Colombia’s second virtual city in population after Bogotá. It is a population that generates significant income for the country, and a group that in one way or another contributes to the image of Colombia abroad. The reasons for emigrating are innumerable and varied, even though they often remain hidden. However, there is a common denominator: the impulse to seek to grow as people and as professionals is something that motivates us to go out and look beyond our borders. In this evolution as people and professionals, does it change how we see Colombia once we are outside?

The answer in my case is a resounding yes. Beyond the details that have not yet been resolved by a long history of conflicts that left traces in the perception they have of us abroad, resulting in discriminatory treatment on occasion due to coming from Colombia, being Colombian while abroad is a reason for pride. From its people, the talent we export in soccer players and our great artists, onwards to a constantly growing economy, with strong financial institutions that protect the country from global and regional fluctuations.

Starting with the people, the Colombian is a reliable, tireless and resilient worker, and at the same time very ingenious. These marked differences become more evident when you are abroad, and you begin to hear phrases like “Colombian contractor because they comply with me”, “because they are good workers, kind and unassuming people”. A strength of Colombia is seen in the talent it has, a talent that is exported and that manages to be successful in various disciplines. These are no longer just fortuitous cases, on the contrary, it is common to see Colombians considered for different significant positions in various areas of international economies. Seen from abroad, Colombia is a great generator and exporter of talent.

And not to mention its landscapes, this is a country that increasingly seeks to exploit its natural benefits, inviting the world to visit it. It takes courage, strength and again a lot of ingenuity to transform Colombia and take it from being a country mired in drug trafficking and guerrillas, to be a tourist destination considered to excellent. With pride in the distance travelled, you can see what Colombia has and how, despite everything, it has positioned itself in the minds of tourists as a great destination. There is undoubtedly a lot of work to be done in order to understand the magic that exists in Colombia. It is still difficult to explain that we have no seasons, not a minor aspect that is highly valued in other latitudes, and that I heard myself whilst being abroad. The potential is infinite, and it is clearly the Colombians who can exploit it, it is those who are abroad who have become an initial window to awaken the desire to travel around our country.

Hand in hand with the landscape, there is the immense diversity that Colombia encapsulates, in every sense of the word: diversity of cultures, of flavours, of climates, which lead us to give multiple responses when asked “What are the typical foods?” Innumerable. “What are the typical dances?” Hundred. “Native animals?” So many. Anyway, do not stop being surprised by the things that Colombia has to offer and that little is known.

And although the work that has been done in fields such as coffee is very large, for now we do not go out in general of the large exporters. In this field there are strong foundations, resulting from serious work over years, but that must also be undertaken to exploit new products of this diversity. From abroad, Colombia is synonymous with diversity.

And to help further strengthen the image we look at when we are abroad, listening to the way in which Colombia is positioned as one of the best economies in Latin America is a great incentive. We speak with ownership of a Colombia with a growth that has been sustained over time, an economy that has only declined a few times in the last hundred years, in a changing Latin America, which suffers bad inflation, huge devaluations and economic declines. Looking from abroad, Colombia is also a country to invest in.

As a counterpoint, at the international level, it is seen that there is a need in Colombia to continue working to reduce inequality and poverty, to provide strong public education and health systems available to all, to continue the fight against insecurity that both we are worried. Comparing Colombia to every other country where its citizens reside is inevitable, we are aware of the reality that our country faces. But we are even more aware that we are part of Colombia, we celebrate as Colombians abroad and we are proud of being Colombian. From abroad, it is clear that Colombia is a country that struggles.

The lens of every Colombian abroad is surely not the same, this is mine and I dare to say that it is the same for a significant majority. A majority that gather together to celebrate on 20th July, to pray the 'novenas' at Christmas time, to eat an 'arepa' or just to dance for a while. It is an extension of Colombia in the world, it must be used in favour of Colombia. From abroad, Colombians working for Colombia. A task to be done.

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USER GUIDE

"UNIFORMITY IS DEATH; DIVERSITY IS LIFE."

MIKHAÏL ALEKSANDROVITCH BAKUNIN

2021: THE DIRECTION OF THE COLOMBIAN ECONOMY

Mauricio Cruz
CFO Ipsos Colombia and Venezuela

A year has passed and the Covid-19 pandemic continues to take its toll on the economy and society, affecting the progress in poverty reduction that the country has made over the past two decades. The measures taken to address the public health crisis led to a sharp drop in economic activity, especially in April 2020, which led to the second quarter showing the largest annual contraction in GDP since quarterly records began (-15.6%). The gradual opening of the economy, the improvement in external conditions and the implemented monetary policy actions contributed to the recovery of the economy from the second half of 2020, but despite this, economic activity suffered an unprecedented decline in 2020, with annual GDP contracting by 6.8%.

This decline in GDP was primarily due to the sharp fall in domestic demand, which fell by 7.6% in 2020, with the strongest phase of the decline during the second quarter, when demand contracted by 17%. The slump in the economy is closely related to the intensity of mobility restrictions, social distancing and self-care measures that affected the operation of different economic activities. The most affected sectors were those related to artistic and recreational activities, commerce, repair, transport, accommodation and food services, manufacturing and construction, as well as mining, as a result of the fall in raw material prices. The main impetus for the recovery in economic activity in the second half of 2020 came from private consumption, which fell sharply for the whole year (-5.8%), but to a lesser extent than the other components of demand. During the fourth quarter, private consumption had already managed to recover much of the ground lost due to the impact of the pandemic.

In 2021, the Colombian economy should continue to recover. However, the speed at which it does so will depend on the evolution of the pandemic. The Central Bank of Colombia projects growth of 4.5%, in a range between 2% and 6%, which is high given the considerable uncertainty that still persists regarding the evolution of the Covid-19 pandemic. Colombia should therefore resume its economic growth path, provided that there is a gradual decrease in the incidence of the virus, which is thought to be possible given the progress of the vaccination programme, which would in turn encourage the relaxation of social distancing and mobility measures, allowing the opening up of the different sectors of productive activity that have been affected.

Economic growth is expected to be further stimulated by the normalisation of business and consumer confidence, and by a monetary policy that will continue to be expansionary, allowing for favourable credit conditions. Added to this is the expected improved performance in civil infrastructure investment, resulting from major public works programmes at the national and local level, the implementation of which should be consolidated in 2021. On the external front, growth will also be supported by the economic recovery of our main trading partners, whose GDP growth is expected to be between 2.5% and 6.5%.

@OmaS via Twenty20

¿CACHAY[3], SUMERCÉ[4]?

Mauricio Ramírez
Service Line Leader - Customer Experience

FROM CHILE TO COLOMBIA

It’s been a little more than a year since, together with my wife and two small children of five and a year old, we arrived in Bogotá after accepting the challenge of taking charge of the Customer Experience service line for Ipsos in Colombia. This offer emerged as an interesting professional development opportunity after nine years of working for Ipsos in Chile.

I received the invitation to contribute with an article to this publication, in order to take a look at Colombia and its people from my foreign perspective and inviting me to address three components: first, to explain my image of Colombia and Colombians before arriving here; second, after having spent several months working and living in the country, contrast whether my preconceptions have been confirmed or not, and thirdly, provide some vision of the future regarding Colombia.

I recognize, dear readers, that at first I thought it was a strange invitation, because I felt “it shows the equality of 1” , that it would speak above all of my own preconceptions, perceptions and opinions about Colombia and its people, and that ultimately it would be rather a reflection of my own evolution in life, rather than a thorough analytical view of this country that has become our home during this period. But later some ideas emerged to complement such a personal view, with some secondary data and with a qualitative survey taken from other foreigners, both Chilean and other nationalities, residing in Bogotá.

So, without further ado, I'll share the following lines in response to the three components mentioned above, constructing a mixture of my own perceptions and experiences, with those collected in these conversations.

In the first place, the preconceptions of Colombia were reflected in the comments of friends and family when I told them about the offer I had received to come to work here; comments that in general were ones of concern, linked to the perception of insecurity that Colombia has been dragging around from the preceding decades...

Of course, in Chile, seven months ago, any other country in the region felt more insecure, but the social unrest that has broken out on our continent, has profoundly called into question how to face the next decades throughout Latin America! How to understand that not only the macroeconomic variables should be taken care of in order to aspire to further development, but also those variables that guarantee dignity, equity, opportunities and the effective equality before the law, to cement a healthy social cohesion that generates solid development and social peace… but well, this subject has given and will continue give many more pages that will be produced by these historical events.

Returning to the central topic, the sense of insecurity mentioned above feeds on concepts associated with Colombia such as drug trafficking, crime and guerrillas, arising from the decades of the eighties and nineties. The most entrenched of these being those associated, reflected and revived, in for example, the proliferation of audio-visual content related to these themes; the successful series and soap operas such as 'Narcos', 'Surviving Escobar', 'The Pattern Of Evil', 'Without Breasts There Is No Paradise', etc.

Personally, I had had a closer look at Colombia, since I had come a couple of times and so I felt more confident about the idea of coming to live here with my family. One of those occasions was a trip made with my wife to Cartagena de Indias when we were dating (or "pololos", as they say in Chile), and another was a trip to Bogotá for a regional meeting of Ipsos, at which time the campaign "Colombia: the risk is that you want to stay" was launched, and I felt then the impetus to shake off that stigma of insecurity, later reinforced by the celebrated peace process and the Nobel Peace Prize awarded to Juan Manuel Santos in 2016.

PERILS OF PERCEPTION

Other associations before we came, and which are more positive perceptions from the southernmost country in the world, have to do with joyfulness, the Caribbean and music. The influence of Colombia on popular music has been prolific internationally during the last two decades with artists such as Shakira, Carlos Vives, Juanes and the most recent J Balvin and Maluma. Another strong concept that is linked to this country is the "coffee culture" and an entrenched agriculture; I will always remember when they offered me a tinto (red wine in most Spanish speaking countries) at 9:00 in the morning, which for a Chilean is synonymous with wine and not coffee!

The attractions of tourism on the Caribbean coast, as I mentioned earlier, with Cartagena, Santa Marta and San Andrés as the most recognized destinations, is another of the ideas linked to Colombia.

Regarding its people, the experience told us was that they are very kind, respectful people, speakers of a very correct and prolific form of Castilian Spanish, the owners of outstanding prose, which explains why Colombia is the cradle of "magical realism".

Now, to address the second component, I can say that several months after our arrival, we remembered how that feeling of insecurity of the first days, of not knowing where to walk, was disappearing as we began to recognize the streets, the neighbourhood, shops, supermarket, pharmacy, and other places we frequented. Although, as is evident, from my expatriate circumstances with amenities associated with the role I play, my vision of the city is partial and biased.

However, and as in any major city in the world - from Bogotá to Santiago - one must walk with caution and know where to travel, and, as they say here, “do not give papaya” (which means don’t leave yourself open to being taken advantage of/robbed).

A notable feature of this country of “a poorly counted” 50 million inhabitants, more than double my native homeland, is geographical dispersion. For example, the Department of Cundinamarca contains just over 16% of the population, followed by Antioquia with approximately 13% and Valle del Cauca with about 10%, and these, along with four other departments, complete the seven that exceed a figure of two million inhabitants.

On the other hand, Chile, with “also badly counted” 18 million inhabitants, contains in the Metropolitan Region of Santiago more than seven million, that is, more than 40% of the population. That implies that in business terms (unless they are working in the extractive or natural resource exploitation industries) almost everything happens in Santiago! On the other hand, in Colombia there are important national companies whose parent companies are not in Bogotá, as is the case with Bancolombia, Banco de Occidente, Nutresa, Grupo Éxito, Sura, Argos, Tecnoquímicas, among others, which implies an expressed strength in the different regions of the country.

Continuing with sociodemographic elements, another aspect that caught my attention as I was getting established in the country was the organization by strata of the houses and rural properties. And how of the six strata, the first three receive subsidies on their basic household services, while strata 5 and 6 pay an extra cost. Without knowing in detail, the impact of this measure, a priority seems to be a public policy that favours social equity by redistributing income; However, on the other hand, segregation is normalized within the city, where neighbourhoods for the poor and others for the rich can be found. Santiago suffers from the same segregation, but without redistributive policy.

Just referring to the more everyday topics, there are situations that also caught my attention, such as how cumbersome it is to enter buildings to visit customers: it is common to pass through metal detectors, register the laptop, enter personal data, accept some biometric or photographic registration. Other processes and procedures are equally cumbersome, having to fill out forms and visit branches to perform them, although in this sense there is a strong evolution towards digital processes.

In terms of service-related activities, I perceived from Colombians in general a very good attitude, being one of caring and patient attention, and perceptive salespeople, almost always proactive in offering options, pushing the closure of a sale - sometimes even being too insistent. A sales assistant in Chile usually does not insist after the first refusal or objection.

In the work environment, again from a biased personal perception, the Colombian worker is responsible and willing to make an additional effort to achieve their objectives - very focused on the value of continuing education and training - and in general with good conceptualizations. On the other hand, I have perceived a tendency towards prolongation: there is a need to explain and argue the ideas, even if everyone involved agrees, as if there was a cultural need for prose ... as I heard from another foreigner, it is a “theatre culture”. My perception is that in Chile things are more direct, blunt, even making us more rudimentary perhaps in our communications.

With regard to that perception I have of the Colombian tendency to complexity instead of simplicity, I see it reflected in the diversity of types of banknotes and coins, in the road connections where both entrances and exits on the highways converge within a few meters, in the awkwardness of some banking procedures and those of public entities, are among some other issues of a different nature.

In the previous paragraph I mentioned something about the roads, which are actually complex in Bogotá. I received many warnings regarding how to avoid the traffic jams, and all were true. Road traffic is a challenge at peak times, and being a pedestrian carries its own risk if one is negligent, as corners are a priority for turning motor vehicle turns and for bicycles and scooters crossing.

Another cultural feature that caught my attention and that of other foreigners were everyday expressions like “sumercé” (translates as Your Grace) or “doctor”. In Chile, we only call a medical graduate doctor, no one else, not even a professional who has obtained a PhD. Then, those expressions that I have often heard, and that I am already accustomed to hearing, beyond a gesture of kindness, do not cease to give me a sense of old servility in the 21st century.

On the other hand, an element that is at the bottom of several of the social dynamics, and that is surely anchored in that complex past, that is the basis of many of the prejudices of this place, is distrust. Distrust may be the explanation for some of the points I already mentioned: cumbersome procedures, excessive security personnel with weapons, demanding security measures to enter a building, etc.

A BETTER FUTURE

Finally, moving on to the third component of the invitation to write this article, the vision for the future of Colombia, from this humble tribune, is that surely in global issues it will not be different from the rest of Latin America in relation to how to continue progressing towards development in macroeconomic terms, but with a system of protection and social development that maintains social cohesion and fuels the trust of the population in its institutions.

In more specific terms, for Bogotá, for example, having a better road and transport system is essential, there are few things that influence daily life more than the quality of transport.

Finally, I am very grateful for this opportunity, which has allowed me to have the experience of living in another country, something that always enables one to have a more universal vision of society and to enrich a person as a professional.

Colombia is a fascinating country, abundant in natural resources and inhabitants of enormous value, with many aspirations as a society, with a large majority who yearn for a better future based on genuine humanistic values, and I am sure they will achieve it! Cachay?

MEGA TRENDS: HOW THEY AFFECT CONSUMPTION IN COLOMBIA

Rocío Alexandra González
Project Manager - Brand Health Tracking

To begin with, we must understand what Mega Trends are: in an interconnected world, with the speed and above all the amount of information we have access to nowadays, it is easier to identify trends, which go beyond fashion; their focus lies in understanding where we are going as communities, and in our case, where consumers are going.

Year after year, we track the consumer from different angles: demographics, connectivity, tastes, desires, aspirations. But what happens to these trends when what we know abruptly changes?

Up until 2019 we saw a demographic slowdown, which led us to understand the consumer with more focused interests in personal development, more single-person households, couples who do not want to have children, new parents with concerns about having superior products for their children, pet owners who demand both pet products and pet-friendly services (from 2000 to 2018, the pet food market grew from US$60 million to US$300 million, according to Fenalco), a growing market concerned about its mental and physical health, etc.., and with all this information we focus on developing strategies to capture these increasingly specific consumers.

Once the pandemic appeared, surprising everyone and showing that we were not prepared for what we had to face, there was an urgent need to

re-understand the consumer from a different point of view: starting from their uncertainty and the assimilation of what was called the "New Normal" around the pandemic.

Over and above the change in media consumption in Colombia, which showed an accelerated evolution towards the consumption of digital content, the expansion of e-commerce, which has led the Colombian Chamber of E-commerce (1) to increase by more than 64% during the months of April and July, reflecting an impact on market purchases by this means due to confinement, economic concerns where we reached -41.3% (2) unemployment in the month of April, and which despite improving at the close of the year, remained in double digits at -10.4%, leading the consumer to reorganise their priorities, consequently we saw several sectors considerably impacted.

The monitoring conducted by Ipsos during the pandemic, and the lessons learned from the information collected, present interesting challenges for the new consumer vision:

THE VIRTUAL EDUCATION APPROACH

Although it is a fact that it is a challenge for everyone to adapt to this reality, the opening up of this educational format for all markets has changed the visual of a lower quality education to become a viable alternative, especially for those who wish to continue their higher or complementary studies. New training platforms such as Coursera, edX or Platzi, or even the giants such as Google, Facebook or Microsoft, are offering quality programmes at low cost that compete with the big universities (3) y which, coupled with benefits such as flexible timetables, reduced need to move around the city and time optimisation, opens up business opportunities for various sectors such as digital media, furnishings, electronic and audio devices, etc.

SECURE EXPERIENCES

Preceding the desire for a return to normal life, is the need to protect oneself and one's loved ones, posing challenges for brands. The return to restaurants, bars, etc., for example, challenged establishments to generate security and trust in the premises, even beyond the quality of products and services; clothing shops opened up to connect with their consumers from digital platforms, offering extra services such as "personal shopper", sending fitting rooms to homes for those shoppers who doubted their satisfaction with the garments, applying flexible and quick change policies for virtual purchases, adopting self-care protocols for visits to shops, etc., not to mention constant promotions, no doubt seeking to minimise barriers to consumer loyalty. The same happened with banks, beauty centres, veterinaries, shopping centres, gyms and all those businesses that include in their DNA the experience as a differential for the consumer. Understanding that consumers have integrated an additional component to the new experiences: safety, or better Biosafety, constituted today as a new habit that seems to remain as a driver in the list of customer requests.

NEW PRODUCT EXPECTATIONS

Regardless the sector or the specific detail of the target audience for our products, consumers seem to be aligned around seeking additional benefits. In some cases they are functional, complementing their consumption/use without generating health contraindications, reinforcing the boom of the last decade for organic products, that of OTC medicines that not only soothe symptoms but also help to improve health, also in personal and household hygiene products that in addition to cleaning also protect, for example; In other cases, the more emotional demand seems to be highest in established brands, those that generate a connection with which consumers can identify, such as helping the environment, being eco-sustainable, or in the case of cruelty-free cosmetics, regarding animal cruelty.

Changes in trends affect consumption in different ways: opening up markets, generating business opportunities, or simply showing us what is no longer relevant. The challenge today is for established brands facing a consumer who demands that they evolve at their own pace but be consistent. Not every brand can talk about everything, not every brand can do everything. Let's remember that the value of the brand is built from the consumer's perception, what they feel, experience and transmit about it, so it is not enough to be different and relevant, a brand must be credible and closer, generating identification.

For consumers, their preferred brands are those that identify with their lifestyle, with their ideals and that allow them to be consistent with their actions, that give them a benefit beyond the functional, brands that transcend the commercial exercise. - Ipsos Learnings

1. https://www.ccce.org.co/wp-content/uploads/2017/06/segundo-informe-impacto-Covid-comercio-electronico-economia.pdf
2. https://www.dane.gov.co/index.php/estadisticas-por-tema/mercado-laboral/empleo-y-desempleo
3. https://www.eltiempo.com/vida/educacion/coronavirus-el-modelo-de-alternancia-en-los-colegios-continuara-en-2021-557142

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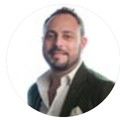
BUENOS AIRES DF-BOGOTÁ



Ulises Cimadoro
Chief Operating Officer - Operations

Despite having had the opportunity to live outside my country of origin twice, and having been clear several times on what I liked about these experiences and what has not done that much for me, it is very different to sit down to write about the experiences and their impact in a narrative that, although it is subjective, tries to reflect my deepest feelings.

It is true that people know (or believe that they know), what they like and do not like, but it is also true that the ability of some things to be pleasant have their nuances, and I am convinced that this depends on the expectations that a person had at a certain point in their life. It may, and it has even happened to me, that perhaps what used to be pleasant no longer has the same value as before, or is no longer so important.

WHAT IS THERE TO SAY ABOUT COLOMBIA OR COLOMBIANS?

It seems complex and even difficult to make an attribution by defining someone or a group people by the mere fact of their nationality, especially if you truly believe that a passport does not define a person, nor the land in which they were born.

I also thought that the ideas, perceptions and feelings that a country can generate, as a foreigner who resides in it, may have more to do with the person than with the country that they are trying to understand. I say this because I had the opportunity to visit Colombia in the late nineties, and the result was an absolute and direct infatuation. Of course, that visit was for brief meetings and mainly for a vacation, but I was left with the strong conviction that I would return: this country had more to give me, more of everything it had offered me, and the greed for experiences of twenty years ago lit a fire in me.

It is obvious that today the experience is different, I do not know if Colombia has changed more than me, or I more than it, but there is no doubt that we are both different, although we also retain the roots of who we were, at least in our nature.

Therefore, today I understand that the sensations, opinions and ideas generated by a country are not only emitted by that place. For better or worse, we are conditioned by our lived experiences, age, desires, thinking, maturity. Thus, the moments of life can define the point of view about the country of residence.

But all this does not imply that I cannot reveal how I have lived my time in Colombia and the experiences that I have had in this place. And what better way than to talk about what they call idiosyncrasy and custom, which are considered to be the variables that most affect the citizens, and those from outside a country.

Arriving in Colombia was easy, in the literal sense of arriving in a country, as I felt no restrictions, limitations or complications during my various entries to it, not even given the fact that Colombia is a place that is affected by the immense and forced migration of Venezuelans, that from the days of my arrival until today remains one of the most significant problems of its internal and external policy. A problem that many countries suffer that are recipients of large waves of foreign migration.

The possibility of having known Latin America far and wide has fortunately allowed me not to harbour the prejudices or preconceptions that many have when referring to Colombia. But it was after I began to stay in Bogotá for a few months, that I began to notice the issues that from the beginning or afterwards were going to generate pleasure or dislike in me.

Undoubtedly, one of the first clashes with reality was the need to complete a lot of paperwork. I recognize that I am a person who dislikes doing any kind of procedure, so my tolerance in this regard is not that high, but I still maintain that conducting due diligence in this country can be an odyssey, since the very simple becomes the very complex, and what could be thought of as being complicated ends up not being so complex. My visa process and obtaining local documentation, although tedious, proved comparatively simpler than being able to obtain internet service, an issue that took about three months from start to finish. So, it would seem that it’s more complex to deal with a private company than with a governmental entity; at least with regard to the latter there was always good treatment and the necessary explanations. That is, in Colombia, one could obtain identity documents relatively easily, which is no small matter … but internet service … no.

On the other hand, talking about a country as a whole would seem simple. However, although it is true that even in those countries with a lot of immigration or mixture of cultures there are some ethnic differences between cities and regions, I have never seen it as much as in the case of Colombia, at least from my personal experience.

Although it is a country that is considerably integrated within the concept of a nation state, and even more so as a nationality - identified by certain values - regionalisms abound and they differ dramatically one from the other. So much so that the regions, not only because of their geography, climate and customs, but also in terms of their of identity, do not seem to get along well with each other.

As you get to know different places in the country, you get to see the realities, cultures, languages and idiosyncrasies that are dissimilar, and many times you are shocked, because they are not only very diverse to the eyes of foreigners, but also to the eyes of other Colombians.

In Colombia, your place of origin, the culture you acquire, the education that you were fortunate enough to receive and the accent with which you speak is very important. The quintessential example of what I am trying to explain occurs in Medellín, which could even be considered the Catalonia of Colombia, and that without a doubt - and if it could - would seek to secede from the country and become independent. It is difficult to be in Medellín and not feel even to a small extent its differentiation towards Colombians from other regions. This potential exclusion takes two forms: it's not only that the Paisa (people from Medellín) will prefer their own rather than someone else in any situation, but also the existence of a somewhat contemptuous, or perhaps envious, regard by the rest of the Colombians when it comes to Medellin.

Continuing with regionalism and the different idiosyncrasies that you face in Colombia, it is also worth mentioning the particularities of the language. Although it is logical to identify the different accents in a country, when one arrives in Medellin, one distinguishes the famous and universally known accent that is usually related to Colombia, that of the soap operas or series; and although it must be recognized that it sounds beautiful live and direct, one should never forget that Colombia has an enormity of ethnicities, cultures and, therefore, languages, even native ones.

Another important myth worth busting is that it is always hot in Colombia. Well, I'm sorry to say that this is not so. Its extensive geography and the high altitude of the centre of the country also ensures that Colombia has a huge landscape and climatic diversity, and this is definitely one of the issues that I had the most difficulty adapting to: the climate, which in Bogotá is usually cool to cold all year round, and it rains too much, with a significant absence of sun, much to my misfortune. To enjoy the heat, it is necessary to go to the coasts of the country, or to descend to the Tierra Caliente (hot lands).

Without a doubt, the Colombian, regardless of the region, is cordial and very respectful, perhaps in the extreme. Beforehand one would have believed that they are more given to friendship, and although this is the case among themselves, it's not so much with others, even less so if one lives in Bogotá. The Bogotano (a person from Bogotá) is a bit reserved, and although they know about partying "rumba" you have to wait a little while to feel like one of them before they'll let their hair down in front of you.

Although the Colombian goes out of their way to show their culture, it is very clear that they are deeply rooted in it, that is, at times it would seem that they are not so open or not so accustomed to living with others. Regardless of the growing number of migrants, it is not a very cosmopolitan country, even though its capital city seems to house or give space to many other ethnicities and nationalities that have been arriving in recent years. And despite observing a slight and growing openness, it is clear that some nationalities are more pleasantly regarded than others. It is also worth mentioning that the barriers of tradition and conservatism are breaking down little by little, giving way to a greater openness in a broader sense.

A true example of integration and diversity of Colombians is, as in many countries in Latin America, food, where personally its flavours do not compare with Mexican or Peruvian cuisine, but it has an immense variety and wide range of traditional dishes that are a true reflection of the large number of regions.

Of course, many dishes produce immediate delight to the palate, some only require getting accustomed to, and others will never be to my liking; and it is logical, since there is no accounting for taste. On a personal note, and like most Argentines, getting used to the idea of always having soup is something that lowers one's morale, and even the idea of having soup in a tropical climate is hard to understand.

It is impossible not to talk about issues that seem to be historically and inherently linked to Colombia, such as insecurity and drugs; however, I think it is time to break with that link that perhaps in the past was ubiquitous. Possibly because of the experience that gave me the opportunity to visit other countries, I do not believe that these terms should be either exclusive or excluded when one speaks of Colombia; it would seem that it is the same Colombian who continues to give a lot of validity and preponderance to these issues, and that although they turn out to be a burden and a social scourge, I do not see that they are native to a single country, I firmly believe that many other nations have situations worse than those that are lived in Colombia today. And while there are currently territorial enclaves, with very serious realities, I believe that all countries keep very complex situations hidden under their carpet that are not even of their own making but are of a transnational nature.

RESILIENCE

Colombians without a doubt, have a great capacity for resilience, but unfortunately this is overshadowed by their own perception of inferiority that does not coincide with their clearly observed qualities; perhaps it is that these opportunities are dispersed that make these qualities fail to be fully exploited, or fail to display the significant potential of a country and a population that fortunately does not try to copy or imitate other nations.

In conclusion, I consider it true that it is difficult to get an idea of a single concept or a few concepts that define "Colombian-ness", as one might be thinking as an outsider with a biased, partial and limited vision. It is true that Colombians possess a strong federal concept with respect to the outside, but when it comes to the interior, the thing, fortunately, is much more diverse in every sense than one could imagine.

Of course, there are still barriers that have not yet been broken to let the world know that Colombia is more, much more, than the 2000 words of this account, reggaeton, the wonderful coffee, and its illustrious ambassador and its antagonistic controversy…

CHANGES

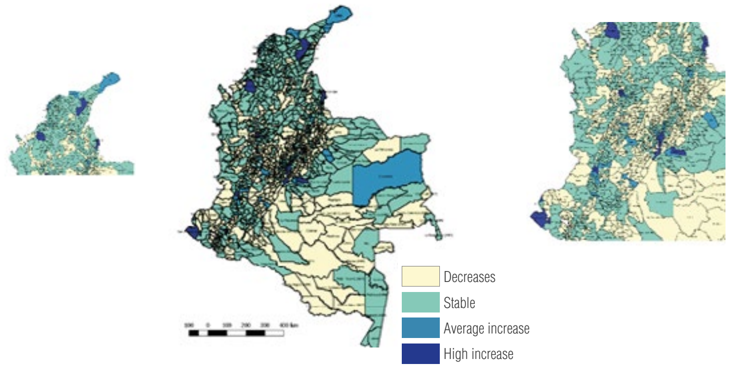
SURPRISES FROM THE COLOMBIAN CENSUS

Sandra Pastran
Statistical Manager

Since July 2019, the National Administrative Department of Statistics of Colombia (Dane) has been releasing the results of the 2018 population census, indicating the new number of Colombians and their main demographic characteristics. From these figures it has been confirmed that the Colombian population has also joined the trend in several indicators observed in other regions of the world, among them; the decline in population growth rates, the migration of the population to the urban areas, and the change in the population pyramid.

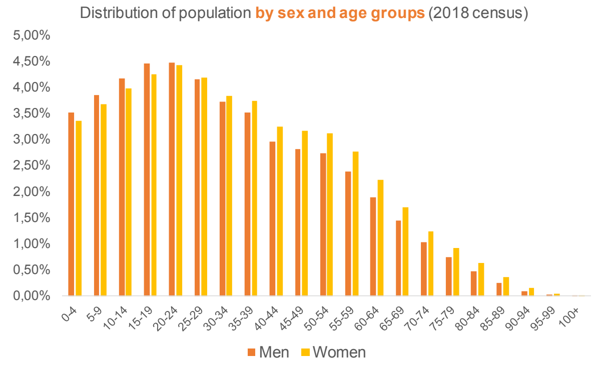
The global figure for Colombians presented by the Dane from the 2018 census was 48,258,494 inhabitants, an increase of 11.1% compared to the data reported in the last existing census, in 2005, which shows that the pace of population growth has slowed. However, the number of households during this intercensal period from 2005 to 2018 grew by 34.7%, from ten million households to 14 million, a figure that indicates a change in the configuration of the number of individuals in Colombian households.

With regard to the structure of the 1,122 municipalities of Colombia, it was observed that 473 decreased in the size of their population, and of these, 128 (almost one in three) decreased their population by more than one fifth vs. the population reported in 2005. The latter are characterized as municipalities with an early or incipient development environment[5]. In contrast, we have the main cities in the country and their surrounding municipalities with the highest growth according to number of inhabitants, including Bogotá, Soacha, Medellín, Bello, Villavicencio, Soledad, Valledupar, Cúcuta, Montería and Cali. The following map shows the variations in growth in the country after thirteen years. It shows a greater concentration of the population in the main cities and their metropolitan areas, allowing the construction of megacities.



Thematic map of population variation, 2018 census vs. 2005 - Dane

Another important change is in the structure of the population pyramid which continues to show a percentage of the female population (51.2%) slightly higher than that of the male population (48.8%). Where there are large changes in the age distribution, these are framed by a slimming-down or decrease in the proportion of inhabitants of younger ages compared to 2005, and a growth or increase in their proportion of older ages. The following graph shows the comparative pyramid in the 2005 census vs. 2018, where these changes in the structure of the Colombian population



Some statistical increases to highlight found in the results of the 2018 census are presented in the following table:

Indicator	Census 2015	Census 2018
Higher education coverage (18 to 24 years old)	27%	34%
Literacy rate	91%	94%
Single-person homes	11%	19%
Female head of household	30%	41%
Aging index (relationship between those over 60 and under 15)	29%	59%

CENSUS RESULTS DANE 2005 AND 2018

This highlights one of the main current phenomena: 13 years ago, for every 100 young people under 15 there were only 29 adults over 60, but today we have an aging rate of 59%, another of the global trends that is taking place in Colombia.

In the coming months, the Dane will publish population projections, the cartographic updates due will continue to explore the microdata published at the municipal level, which will allow it to further characterize the population and continue studying population changes in the country.

6 LESSONS LEARNED FROM THE EVALUATION OF PUBLIC POLICIES

Cristina Querubín
Service Line Leader - Public Affairs

In the last two decades, the Colombian government, especially at the national level, has made a significant effort to invest in the evaluation of its most relevant social policies and programs. The purpose being to have better information when making adjustments and continuity decisions with regard to such programs.

One of the specialty areas of the Ipsos Public Affairs service line is a precise awareness of both quantitative and qualitative methodologies for evaluations of institutional operations, the impact or results of social programs.

In recent years, we have been responsible for developing the evaluations of the Penitentiary Resocialization Process (DNP/Inpec), of the Community Welfare Component of Families in Action (DNP/Social Prosperity), of the Urban Environmental Management Policy (DNP/Minambiente) and the National Recreation Plan 2013-2019 (Ministry of Sports). Currently we are also starting evaluations of the National Plan for Music for Coexistence (DNP/Mincultura) and the Houses of Justice and Citizen Coexistence Centres Program (DNP/Mini Justice).

These evaluations have enabled us to learn about some repetitive practices in the design and execution of public policies across several governments. We would like to highlight these here:

1. Resources are not designed or allocated for the subsequent monitoring of social program participants once they end (all state interventions have a limited time period - which is desirable and understandable), after which participants and beneficiaries "graduate" and continue on their own path. But to ensure the sustainability of many of the projects, a support process is required during the transition towards the best designed form of independence, with good funding and officials dedicated to this purpose.

2. Where the policy or program depends on the coordination of several ministries or entities, there are many obstacles to the institutional structuring. One of the obstacles is jealousy between institutions and the struggle for power, but this is not the only one. It also happens that the entity or ministry is assigned extra functions without being supported by an additional budget. Therefore, the entity often designates an official with low decision-making power to attend meetings on the program protocol, but it ends up being a single entity that assumes most of the burden to execute it.

3. There is an excess of centralism in the design and execution of the programs. This centralism is often excused by the argument that there is more corruption at the local level and that the other territorial levels are excluded in order to shield the programs from politicization. While it is important to keep programs protected from political interests, it is also true that this cannot be generalized, since local governments are the ones who know their communities best and, therefore, they could contribute significantly when it comes to adapting the programs to the realities of the territories.

4. The differential approach - that is, the possibility of adapting these programs to minorities or vulnerable populations such as victims of conflict, older adults, indigenous people, Afro-Colombians, people with disabilities or female heads of household - is very weak. Despite the fact that the differential approach is present in the discourse and documentation of the different entities, this approach is applied promptly in only a few locations, and excludes some populations. The explanation for this is due, in part, to many officials' lack of training to understand and interact with these populations.

5. Most programs and policies have poor information systems and indicators. In programs with national coverage, information systems allow officials who operate the program to make adjustments on the fly and have improved clarity about what works and what doesn't work in the different interventions. However, at best, there are only superficial indicators (percentages of beneficiaries to whom a good or service has been delivered) that are insufficient to base good decisions on.

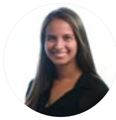
6. Annual hiring cycles interrupt the continuity of programs. The contracts end for all contractors towards the end of December, and the new engagements can take several weeks. During this period, program participants are "orphaned," as these officials often play an important role in social work or psychosocial care.

Although the above reflects the aspects that most urgently require improvement in the different programs, there do exist other shared strengths that should be highlighted. The most relevant of these is the effort to reduce state welfare and strengthen citizens to manage their future themselves, and the fact that these programs generate a greater presence of institutions in areas where they have traditionally been absent.

Finally, for any policy or program to obtain good results (and this is a very appropriate message in the current circumstances, with the change of departmental and municipal governments), it is crucial that governments maintain continuity in regard to what works, and that there is a common vision for long-term development in the territories, even among governing authorities of different political affiliations.


@ameg2013 via Twenty20

FROM THE POPULAR WISDOM OF COLOMBIA


Daniela Rey
Sr. Research Analyst - UU-Understanding Unlimited - Qualitative


Juan Pablo Calderón
Head Service Line - Brand Health Tracking

SUMERCÉ

"Sumercé" (a word used by the inhabitants of the Department of Boyacá in Colombia), is one of the many ways we refer to each other in Colombia, but this expression has a particular nuance of kindness, affection and at the same time, respect.

Like this, there are many other expressions and sayings that we use constantly in our country, where we have the good fortune of having a multiplicity of riches: fauna, flora, colours, people, and even a way of speaking. In our culture we are diverse, authentic and creative, and the way we speak is a clear reflection of this. We have multiple sayings that have been interwoven into Colombian culture, staying alive generation after generation, building on what we are as Colombians and becoming an essential part of our cultural traditions.

These colloquial sayings, although they are known to all, are not necessarily used in all contexts, since they are mostly used between family and friends and form part of our informal jargon. However, this creativity of expression when talking among ourselves enables us to have sayings for almost every occasion, which symbolizes the wisdom of our ancestors when creating them.

For example, we have several enlightening colloquial sayings that work to grab attention in a trusting way. One that is said when someone greets someone else without much interest is “Did you sleep with me last night or what, given that you haven’t said hello?”, or if we want to warn against doing something that will have negative consequences, we say “The warned soldier does not die in a war”, and if we are in the middle of an argument and someone opens their eyes too widely in a show of obstinacy, we say “Don’t open your eyes at me, I’m not going to put drops in them”.

There are other sayings that are more frequent in family contexts (from parents to children), but it is also valid to use them in other circumstances.

For example, when an older person wants to point out that their experience and wisdom are not being taken into account, they say “What’s this? Now the birds are shooting at the shotguns!” or “Are you going to teach your dad how to make children?”; When parents notice tiredness in their children, they are told “Go back to sleep where you stayed up until late last night” and when they want the house rules to be followed, they say “As long as you live within these four walls, whatever I say is done”.

A LEXICON FOR INDULGENCE

We also have many sayings that convey advice on various occasions. For example, “Better a bird in the hand than a hundred in flight” we use it to tell someone to give priority to what they already have as an insurance against what seems better but is uncertain.

We also say “God helps those who rise early” to help one to remember that whoever works diligently towards any intended goal will succeed, and when we want to say that it is better not to pay attention to ill-intentioned comments we say “Turn a deaf ear to foolish words”. By saying “When the river sounds, rocks come” we want to imply that the rumours on some subject have some truth, and it is better to pay attention just in case.

Other sayings that we use as advice are: “Clear accounts and get thick chocolate” meaning that if a relationship is established, whether professional or personal, it is better to have all the terms clear from the beginning so that there are no surprises later. “A dog that barks doesn’t bite”; we say this to remember that when a person reacts by making a lot of noise or fuss, they usually don’t act and end up doing nothing. To give us encouragement when going through bad times we say, “Put on a good face in bad weather”, and to remember that there are times when it is necessary to be patient and wait, we say “Let the macho man piss”.

Furthermore, we have expressions for both the good we are presented with and the bad times we are going through. In the case of being in a situation where we notice something wonderful, great or fantastic we say, “¡Qué chimba!” (Super!) or “Eso está del chiras!” (That is really wonderful!), But when we find ourselves in not-so-encouraging circumstances we can say “If it rains over there, here doesn’t escape it either”, as if to indicate that whatever one is going through it’s just as bad or worse for a colleague, friend or family member and when something is not going well for us despite having planned it, we say “The shot backfired”.

There are other occasions when we want to talk about the characteristics or qualities of someone, for example; “He/she is more prepared than a yogurt”, when we want to point out that this person is more than ready for an occasion or that they are well qualified or experienced. And, thanks to our extensive creativity and wide vocabulary, when expressing admiration or paying a compliment to someone’s physical attributes, whether from a man or a woman, we say “Oops, but who asked for chicken?”

Other expressions we use are: “They think they’re the last Coca-Cola in the desert” or “They think they’re the ultimate at the guarachas” (a complicated and difficult form of Cuban music/dance), to talk about someone who has very high self-esteem; “He/she speaks even from the elbows”, to indicate a person who talks too much; If someone pleasantly surprises us and exceeds our expectations, we say “The one who runs the least, flies” or if it’s you who wants to emphasise your own characteristics, you can say “When you went, I went and came back”.

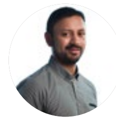
Finally, to say thank you, we say, “My God will pay you” and to say goodbye we can say “Go through the shadow”, that is, be careful.

These are all expressions that we use for affection, for charm or by custom, but in the end each of them is a vehicle to transmit cultural traditions and, even more importantly, to transfer knowledge or popular wisdom from generation to generation.

@LeopoldoMacaya via Twenty20

PREDICTIONS COLOMBIA 2021

Cristina Querubín
Service Line Leader - Public Affairs



Pablo Valbuena
Research Analyst - Public Affairs

Towards the end of 2020, considered one of the worst years in recent human history, there was high expectation among the world's population about what would happen in 2021.

Ipsos global, in its annual World Predictions 2020-2021 survey, investigates the perception of citizens from different countries about what will happen in the social, political and economic spheres. This will specifically be our point of reference for analysing Colombians' expectations for the beginning of the current year.

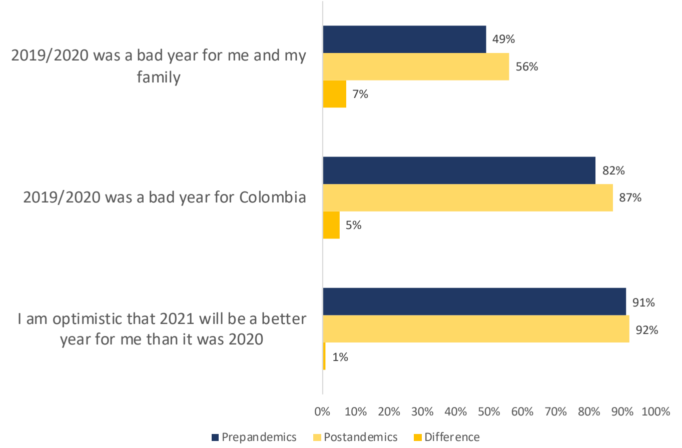
MOOD OF COLOMBIANS (PRE VS. POST PANDEMIC ONSET)

In general, as had already been the case according to other surveys, Colombians continue to stand out for being more optimistic than other countries in Latin America (6 points above) and also in the rest of the world (16 points above).

However, it is surprising that, given the current conditions, this growth is maintained, albeit moderately (1 point more than in 2020).

On the other hand, it is notable that we are collectively more pessimistic: 87% consider that 2020 was a bad year for Colombia (+5 points difference with respect to 2019), while 56% consider that 2020 was a bad year for them and their families; in other words, the majority rate 2020 as a bad year for the country, but not so much for individuals and families. In contrast, 44 out of every 100 people consider 2020 to have been a good year for them and their families, a figure that is surprising given the limitations in terms of mobility, the impacts on the economy and the health crisis resulting from the pandemic.

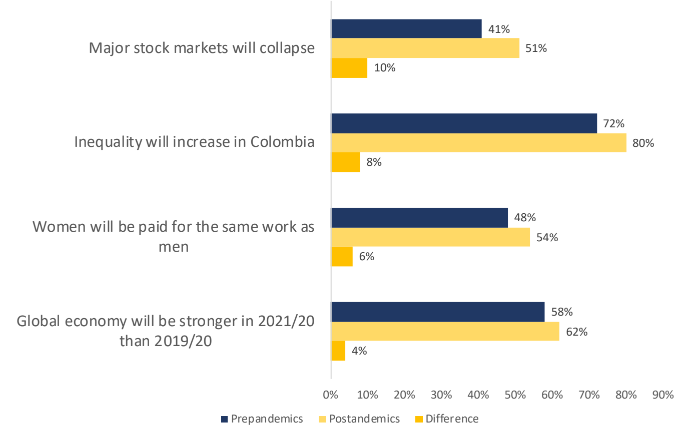
A socio-demographic breakdown of these results shows that pessimism is higher among men than among women (although, as has already been documented, the pandemic has had a bigger negative impact on women); at the same time, young people and people with lower incomes are more pessimistic.



ECONOMIC PREDICTIONS OF COLOMBIANS

A contradiction exists among Colombians when it comes to the future of the world economy. When asked whether it will improve by 2021, 62% believe it will (4 points higher than in 2020), while 51% believe that the world's stock markets will collapse by 2021. Of course, this is contradictory, since if the world's major markets collapse, the economy as a whole and globally will not improve.

Regarding the increase in income inequality, the opinion of Colombians is in line with that of many economic analysts, in that in Colombia and in Latin America inequality is going to worsen significantly: 80% of those surveyed say so (8 points more than in 2020).

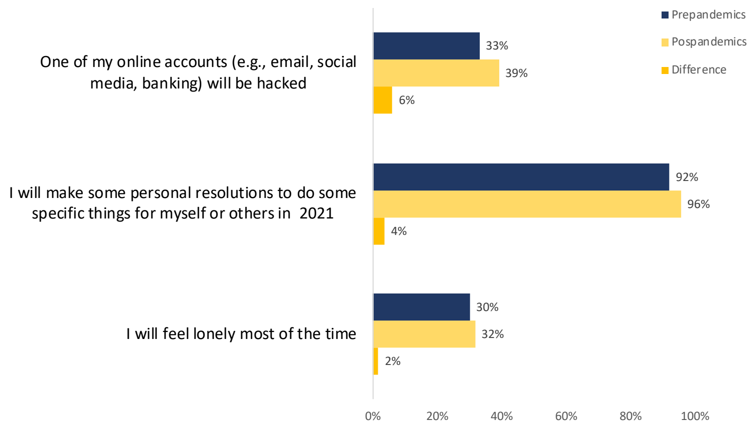


When asked whether women will be paid the same as men for the same work, there is a 54% perception that they will, even though several studies have shown that a gender pay gap persists around the world and that the pandemic will further accentuate this situation. This shows that men are less aware of the reality of the gender pay gap.

SOME PERSONAL PREDICTIONS OF COLOMBIANS

- The percentage of perceived cyber-insecurity has increased by 6 points. Therefore, it is important for brands and companies to support online shoppers with clear signs that cybersecurity is being taken seriously.

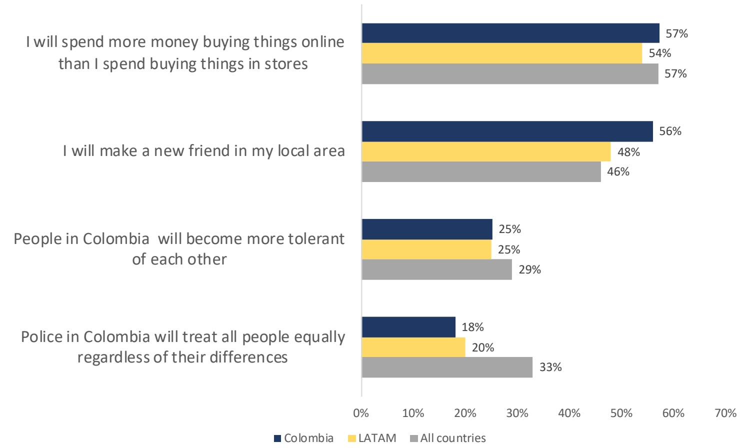
- The feeling of loneliness among Colombians, despite the restrictions and the loss of personal contact, remains almost the same (no considerable percentage change compared to 2019). Disaggregating this, we see something very interesting: those who feel the least lonely are older adults, even though this is the population group that was most restricted at the beginning of the pandemic. On the other hand, those who have felt the most lonely are young people. This phenomenon may be due to the fact that they are more used to socialising outside their homes. It is therefore advisable that, if any brand wants to appeal to the feeling of loneliness in its communications, these should be targeted primarily at young people.



COLOMBIA VERSUS OTHER COUNTRIES

- Colombians intend to spend more money online: 57% say they intend to do so (3 percentage points above the average for Latin American countries), which is good news for all brands. A socio-demographic breakdown shows that this intention is higher among men. This implies that there is important educational work to be done with women, since, although in some categories they are the ones who buy the most, they have fewer skills to manage in the digital world (especially in certain socio-economic classes).

- The perception of the police is the lowest in the world: only 18% believe that the police treat all people equally, regardless of their differences.



OTHER RESULTS OF THE WORLD PREDICTIONS 2021 SURVEY

Colombians, more so than most countries in the world measured in the survey, value personal experience and human contact, even more than quality, when rating a brand. This shows the challenge faced by most companies, since the current context of the pandemic leads to much more automated services that are not well received by the country's consumers..

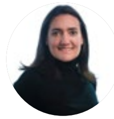
9 out of 10 Colombians would like to be healthier and fitter, higher than the average for the world countries measured in the survey.

Mistrust of the traditional media is growing (46% distrust), which can have two facets: on the one hand, it indicates that a more critical position is being generated regarding the information that citizens receive from the mass media, and on the other hand, it shows the danger that the sources that are being validated are other than the traditional ones, such as anti-scientific content or Fake News.

Finally, 9 out of 10 Colombians believe that businesspeople should speak out more on social and political issues affecting the country.

@eveorea via Twenty20

FEMINISM AND THE GLASS CEILING



Ana Escobar
HR Director - Brazil.

"Feminist: A person who believes in the social, political and economic equality of the sexes."
Chimamanda Ngozi Adichie

Aware of the positive effect that gender equality has on economic growth and sustainable development, the member states of the United Nations committed themselves in 2000 to the Millennium Development Goals, and since 2015 through the Sustainable Development Goals (SDG), to achieve gender equality and to end all forms of discrimination against women and girls.

However, although not surprising, the results of Ipsos Global Advisor[6] on general attitudes towards gender equality are curious. The majority of people surveyed globally (and eight out of ten in Colombia) agree to the aim of equality between men and women, but only one third (38% in Colombia) define themselves as a feminist. It seems, and consequently has been sold by different sectors in the country, that the qualifier "feminist" has a negative connotation and was not seen as the search for equality between people of different sexes, which, as a priority, should be something positive for any society.

When thinking of gender inequality in the work environment, this refers to different issues such as: sexual harassment, reconciliation between the personal and work life balance, access to the labour market, wage gaps and the real possibility of accessing leadership positions within an organization.

When Ipsos Global Advisor explored the biggest problems facing women and girls, harassment and sexual violence were mentioned most worldwide, followed by unequal pay between men and women, which had a few more mentions than in the previous survey in 2018. In Colombia, in addition to the previous ones, physical violence against women also stood out, as a problem that had the greatest number of mentions among the men surveyed.

Nonetheless, when asked about the most important actions needed to achieve gender equality, 36% of respondents (40% in Colombia) suggested equal pay between men and women who undertake the same role. In the same vein they considered that other actions that would have a positive impact on achieving equality between the sexes, would be for men to assume greater responsibility for child rearing and home care, and for employers to make greater efforts to promote women to leadership positions.

More than half of the respondents in Colombia (56%) do not think that enough is currently being done to achieve equality with regard to child and household care. Although, when compared to the global average, there is more confidence that the situation will improve within the next 20 years: 46% in Colombia vs. 39% globally.

With regards to access to the labour market, according to figures from the National Administrative Department of Statistics (Dane) the unemployment rate (UR) closed at 10.2 in September 2019 (vs. 9.5 in 2018). However, the UR is higher among women by almost 5 points (8.1 in men and 13 in women), despite the fact that the educational gap of women has closed in recent decades.

In the labour market, inequalities are not only given in terms of access, but also in terms of the wage gap and possibilities for promotion within organizations, as mentioned before. According to UNDP figures, globally there is a salary differentiation between men and women of approximately 23 points: for every 100 pesos a man earns, a woman in the same role earns 77 pesos. Colombia is no exception, and there are even sources that speak of a differentiation of up to 30 points.

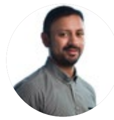
Finally, we have the “glass ceiling” understood to be barriers that are not officially recognized, but that prevent or obstruct the professional advancement of some social groups, in this case of women, to grow vertically within an organization. The expression “glass ceiling” was coined more than forty years ago (1978) by Marilyn Loden, who is today a writer and consultant on gender and workplace discrimination, and although the world has undoubtedly made efforts to reduce discrimination towards women, the problem is still valid. The “glass ceiling” does not refer exclusively to the inability of women to access certain positions within a hierarchical structure, but also to whether their ideas or proposals are taken into account and valued.

Nowadays, it is not enough for companies to have equal numbers of men and women on their board of directors (parity) or that there is even an equitable remuneration policy, it is necessary to have policies that allow equal treatment for men and women, where different leadership styles are valued.

In Loden’s words, speaking of the biases of the glass ceiling, “*I mean the biases that assume that men are ‘innate leaders’, that working mothers are not committed to their careers, that women are too emotional…* “

Understanding and accepting that diversity is a key component for development will allow equity to be a reality, not simply an issue that has to be discussed and studied.

THE RISK OF BEING TRANSGENDER IN COLOMBIA

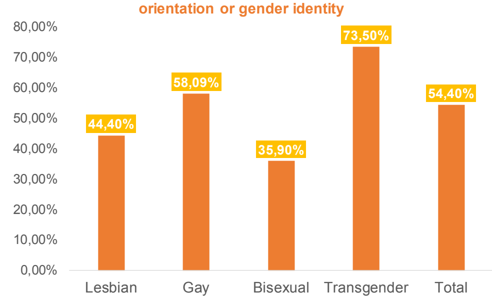


Pablo Valbuena
Research Analyst - Public Affairs

"Uniformity is death; Diversity is life".
Mijaíl A. Bakunin

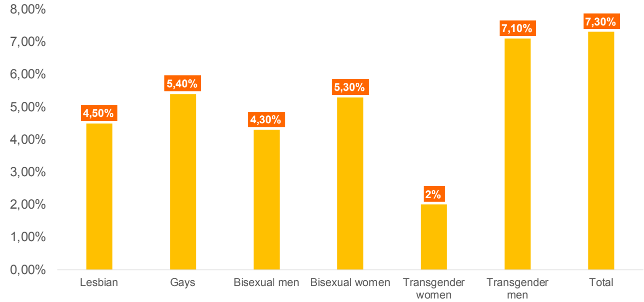
According to figures from the Inter-American Commission on Human Rights (IACHR), the life expectancy for transgender people in the Americas - that is, in all countries included in the Americas - is 35 years[7]. This information, although it is an estimate, is close to the average age of fatalities reported by human rights organizations in Colombia, including Colombia Diversa[8] and the Santamaría Foundation in el Valle[9]. And it is within the LGBTIQ + collective, that the trans population[10] is the most exposed to acts of violence and discrimination (see figure 1).

Figure1. Percentage of discrimination **due to sexual orientation or gender identity**



even from educational institutions (see figure 2).

Figure2. People from LGBT sectors who express **having suffered some kind of discrimination, abuse and / or aggression** in the education system, due to their sexual orientation, gender identity or gender expressions



To review this situation, it is important to begin by clarifying the concept of gender identity, which refers to the personal perception and/or manifestation of gender itself [11], and which may or may not coincide with the sexual characteristics of individuals.

That manifestation in some cases implies physical transformations that differ from the established social order. These bodily changes can often lead to situations of discrimination in which access to work, education and personal development is limited, as is the case with the trans population.

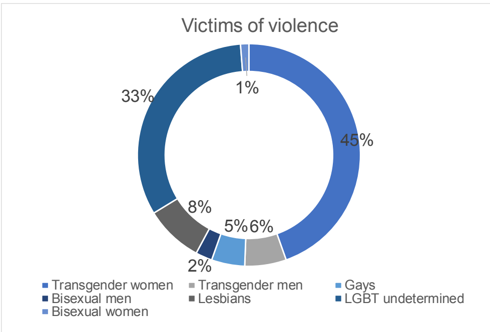
According to the Demographic, Population and Diversity Report of Bogotá (2013), there is an unfavourable towards the citizenship of the trans population, regarding their ability to exercise certain right such as forming a family (59.6%), getting married (37.5%), showing affection in public (52.5%), among others. Given these circumstances, we can determine that one of the main causes of discrimination against this population in Colombia would be the low recognition of diverse gender identity.

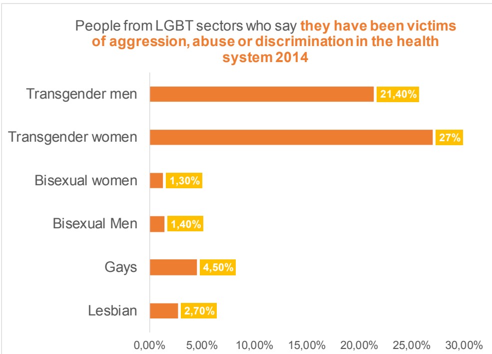
Actions that Colombians say should not be allowed for different gender identities (%)				
	Lesbians	Gays	Bisexuals	Transgenders
Raise or adopt children	58,22	57,62	57,42	59,60
Public kisses	49,50	49,38	50,15	52,50
Marry each other	36,49	36,76	36,74	37,54
To teach as teachers or professors	25,93	27,77	27,61	31,63
To be part of the Military Forces	24,87	26,52	24,03	26,82
To exercise leadership (at work or in the community)	19,81	21,81	21,65	23,73
To hold public office	17,80	19,72	18,84	20,58
Frequent public places	14,49	16,42	15,07	15,80
Go to churches to practice their religious faith	13,82	14,86	15,01	14,92

Source: Demography, Population and Diversity Report - Bogotá-2013[12]

On the other hand, Colombia is a country where ideologies that validate discrimination based on sexual orientation and diverse gender identity persist, and are promoted. This can be seen in social movements, some religious[13], in which the exclusive validation of "socially define"[14], gender roles are promoted. This disqualification and invalidation of minority groups has repercussions in aggression scenarios:

- 37 registered cases of police violence against trans woman (2008-2017),
- 27% from all victims of aggressions in the health system, were trans people[15]





Similarly, other causes would be the lack of documentation and classification of cases of violence against this population and the low promotion and effectiveness of existing complaint mechanisms.

By contrast, the Colombian State has undertaken considerable initiatives through public policy guidelines to protect the trans population[16]. However, it is necessary to create a gender identity law such as the one passed by Chile[17], in which minimum standards of protection for this minority was established, taking into account that their needs differ greatly from those they have for the other members of the LGBTIQ + community.

For Ipsos, as expert consultants in the area of public opinion, we have a very important role in these processes of social and regulatory changes.

In the first instance, by acting as a thermometer for society through our citizen perception surveys, and thus determining how we are doing in the fulfilment of the rights of this population, how their social acceptance is progressing and in what sense should efforts be combined.

In this way, it is recommended that the information gathering instruments include aspects of significant relevance for the trans population, such as access to health, education and their mechanisms for social inclusion.

As a second measure, we have a fundamental role in supplying information and providing statistical tools to decision makers for the eventual construction of health, labour, social, legal and regulatory policies, as the case may be. All this should work to guarantee social inclusion to some extent and thus reduce the high rates of discrimination and violence towards this minority sector.

COVID-19: CHANGES IN SERVICE

Mauricio Ramírez
Director - Customer Experience

“Covid-19 forced the digital transformation to advance what was expected to take several years to achieve”.

This phrase, or some variant of it, has been heard and read frequently in the months following the onset of this unprecedented global crisis in our recent history..

The aim of this article is to take a brief look at the way in which this pandemic has affected services, both from the perspective of those who receive them and those who provide them. To do so, we will use a conceptual scheme called the employee-customer value chain (see Figure 1), which allows us to interpret several of the interfaces that converge in what we call the customer experience ecosystem.

Figure 1. Employee-customer value chain

What this scheme reflects is that, in order for companies to have the desired business results in financial terms, they require their customers to behave favourably towards the business (repurchase, renew, recommend, upsell, cross-sell, etc.). Such behaviours are more likely to be achieved to the extent that customers develop positive attitudes towards the services and products provided by the brands of such companies (functional satisfaction, but above all an emotional bond). These positive attitudes are strengthened or weakened in each specific customer experience in the different channels, processes and interactions of their different customer journeys, and depend, to a large extent, on the actions taken by the front-line employees of these companies, since they are the ones who interact with customers in the contact centre, attend to them in branches or shops, respond on social networks or chats, deliver, install or repair at home, etc. But also, from the actions or omissions of those employees who support those functions, and finally from those employees who in leadership roles define purposes, values, priorities, policies, channel strategies, processes, procedures and protocols that determine what frontline employees can and cannot do.

This chain, of course, occurs in a context where the actions of competitors influence customers' experiences, attitudes and behaviours, but also - and here we come to the heart of the matter - there are environmental factors that influence this chain. And what more brutal and dramatic example than a global public health crisis like the one triggered by Covid-19!

According to how the events unfolded, the first phenomenon resulting from the pandemic was that of restrictions, confinement and quarantines, which forced people to withdraw and limit their mobility, challenging companies to adapt their products and services to the new context, with employees teleworking, and face-to-face services reduced to a minimum. On the other hand, customers faced supply uncertainty and the need to change their usual purchasing and consumption behaviours, which forced them to reconfigure their decision-making processes, and the evaluation and analysis of products and services to respond to their new needs and constraints.

Clearly, the first sector to adapt was the health sector, which had to redirect resources, develop new protocols and procedures, train and empower its employees, accelerate telemedicine, and so on.

Biosecurity quickly emerged as a new “hygienic attribute” for any service, where physical interactions had to take place in compliance with sanitation recommendations (social distancing, capacity and temperature control, use of masks, frequent hand disinfection, etc.).

In short, the world changed dramatically in a few weeks. The population went on an emotional journey as the pandemic progressed, with different phases between geographical areas, and in our latitudes we watched in disbelief what first began in China and Asia, then moved to Europe, and then inevitably to our own continent.

In the light of the outline above, then, let us take a look at how this environmental phenomenon, which started more than a year ago, has changed services.

EMPLOYEE ACTIONS

First, different sectors of the economy were affected in different ways: air and intercity transport, tourism, casinos, bars and discos, cinemas, theatres, among others, were simply unable to operate under the containment measures.

Other sectors were badly affected, but thanks to rapid adaptation they were able to continue providing their services (banking, public services, insurance, retail, automotive, restaurants, drugstores, health services, education, etc.). This led to an explosion in demand for non-face-to-face service channels, contact centres, including call centres (both IVRs and operator-assisted self-service), chats, and social networks. All of them were overwhelmed by a very complex context in which, in addition, facilities were limited in their use, companies had to implement home office policies, and to increase capacity, many administrative or physical shop employees had to be quickly trained to support remote channels.

In face-to-face care, biosecurity dominated the agenda, with the appearance of plexiglass or transparent plastic to maintain social distance at the checkouts, capacity control, everyone wearing a mask, etc. Policies, procedures and protocols had to be adapted, sometimes designed on the fly, which were difficult to apply in reality, it was a process of trial and error, and employees had to memorise them quickly.

Other sectors experienced a boom! E-commerce exploded, forcing many to develop in weeks what they had not been able to do before or what had been planned for months or years. So did telecommunications services, such as teleworking and teleducation, which became routine, but required improved Internet, which also boosted streaming services. Finally, delivery services such as Rappi, Mercadolibre, among others, saw their number of users multiply, forcing them to make their platforms more and more robust and adding more and more services and verticals.

CUSTOMER EXPERIENCES

Customer experiences were also affected, but in different ways according to the socio-demographic segments of the population, and according to user archetypes. That is, people from segments accustomed to physical or telephone customer service, but who are distanced from the use of remote and self-assisted means, saw their experiences much more affected, such as older adults or segments with low educational levels or low digital and financial constraints.

For other segments that interacted regularly with services through self-service channels before the pandemic, adapting to the new reality was easier. However, their more straightforward, pleasant and resolvable experiences influence their future preferences and behaviours.

Therefore, there is a huge challenge for companies when launching new channels and services, related to the adoption of these in the different segments and archetypes, where the user experience is fundamental.

ATTITUDE FORMATION

In an environmental context where habits (based on automatic and unconscious decisions) were disrupted, the reconfiguration of attitudes has been much more intense for customers in recent months. For example, before the pandemic, one could do the monthly shopping in a large room of supermarket X, without ever questioning any other option, as it was the automatic habit, and it worked well and one was satisfied with the experience. But when it was impossible to go, given the restrictions or the fear of contagion, the habit had to be reconfigured and new options sought, which formed new attitudes that impacted monthly shopping behaviour.

Likewise, there are examples in various categories of services, where experiences either strengthen attitudes or weaken and reshape them. As mentioned initially, these favourable attitudes are deepened to the extent that functional satisfaction with services is complemented by the development of an 'emotional bond'. For example, when companies implemented proactive relief measures (not charging for a cable operator's football channel, increasing the internet provider's GB, not cutting off a public service, etc.), they generated in the customer the perception of 'fair treatment'; if a retailer provides in its App a system to track the purchase of a household appliance, it generates a sense of 'certainty'. Fairness' and reassurance', together with 'control', ownership', 'status' and 'delight', are the main forces that build the 'emotional bond' that makes attitudes and relationships stronger.

BEHAVIOURS

It is evident, then, how many of our behaviours have changed with the pandemic. The grocery shopping that used to be done in your favourite supermarket outlet may now be done via a home delivery app. Or the family outing to a restaurant and then to the cinema, is now a streaming series with fast food delivery. Or what used to be a family birthday celebration at the celebrant's home, is now a video conference, etc.

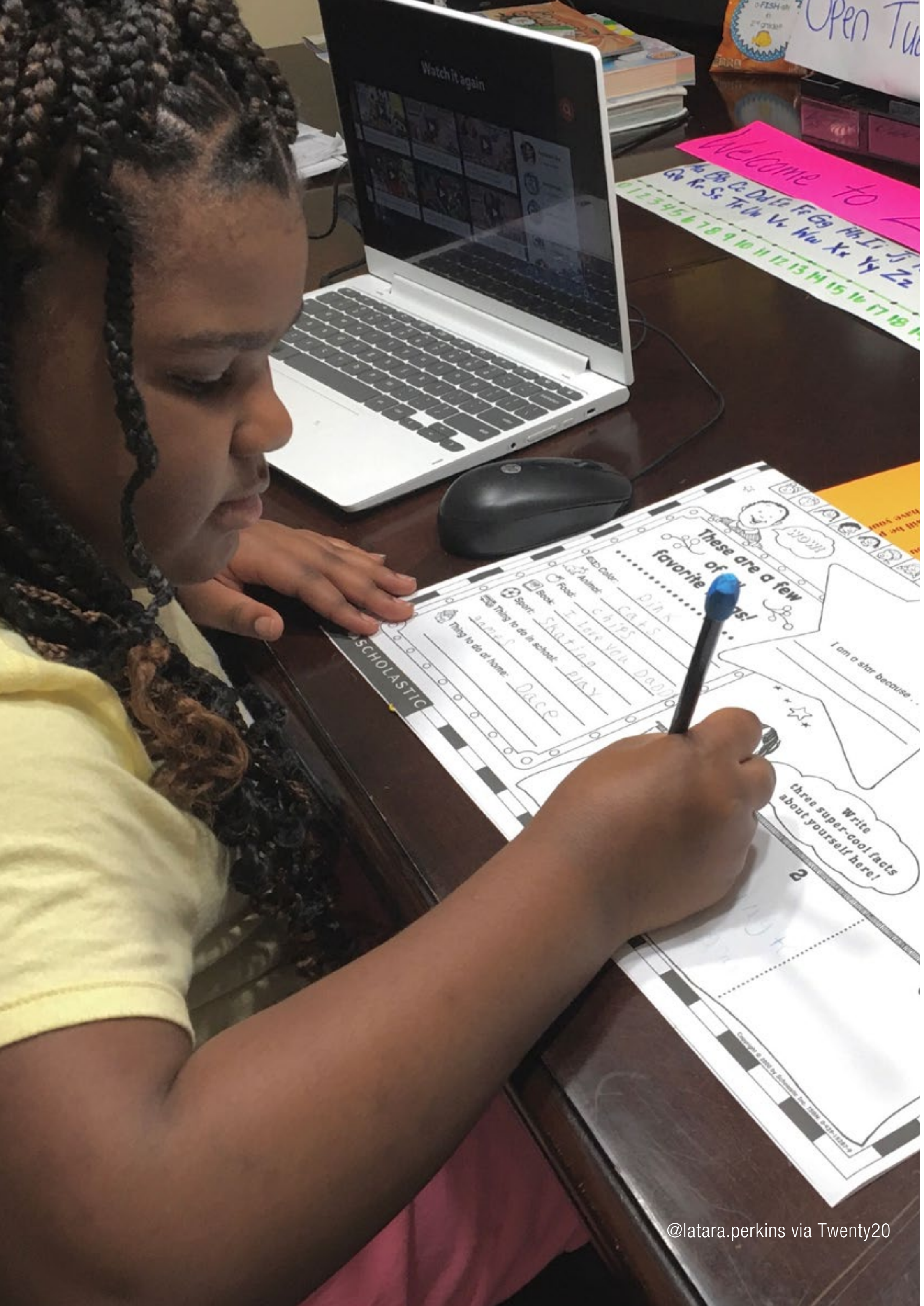
The big question is, will we resume our previous behaviours when the pandemic is over, or will we stick to our new, and often imposed, habits? Certainly the answer will be something in between: some activities we will want the same as before (going to the cinema, celebrating in person with family and friends, travelling and seeing new places), and for other needs we will consider as better the way we solved them during the pandemic; for example a telemedicine appointment for people in remote places or with mobility difficulties, or receiving through e-commerce more variety of products to our doorstep, or using digital means of payment instead of cash, etc.

BUSINESS RESULTS

Finally, companies have realised in this pandemic year that customer experience is imperative to deliver the business results they need to fulfil their purpose and role in society. The fact that customers are retained, repurchase, renew, recommended, can only be achieved if they are provided with positive experiences that reinforce their favourable attitudes and emotional bonds.

The chapter of the pandemic in our history, however much we would like it to be over, still has paragraphs to be written. We are seeing that, despite the start of the vaccination campaigns, infection rates are still skyrocketing in several countries in our beloved Latin American region. Hopefully, hope will remain, trust will be reconfigured, and the different social actors will continue to do their best so that, each in their own role, will contribute to overcoming this crisis.

It is clear that services have changed in recent months, largely due to the effects of the pandemic, but they will continue to do so at an accelerated rate due to another factor that has to do with the imminent massification of emerging technologies (IoT, electromobility, etc.), which will have a huge impact on our lifestyles, but that will be the subject of future articles.



@latara.perkins via Twenty20

2020: TEACHER OR EXECUTIONER?

Daniel Ocampo
Research Analyst - UU-Understanding Unlimited - Qualitative

We begin 2020 after a year that was not easy for the region. In 2019, Brazil, Mexico and Argentina went through difficult times in economic terms, while in Ecuador, Bolivia, Chile and Colombia, social crises erupted and shook the south of the American continent. However, the economic outlook was projected to improve in the following year, although there would still be challenges.

However, from the very first months, the world experienced the beginning of one of the most transformative processes in recent history. After a failed attempt by the international community to contain the outbreak of a new, unknown virus in China, Covid-19 was declared a pandemic by the WHO on 11 March 2020, which abruptly changed the rules of the game and the destiny of that year, which was still in its infancy.

The business and corporate world had to face major challenges: confinement, the uncertainty generated by a stalled economy, the health of its employees and collaborators, and finally the change in the methods of research. In the words of Ulises Cimadoro, COO of Ipsos Colombia: “The pandemic was a global event, a historic moment that prompted us to change, to think differently and to do things differently. For that reason, for Ipsos and its clients, apprehension and uncertainty translated into questions, sometimes uncomfortable, sometimes with a halo of vulnerability: What do we do? How do we proceed? Should we do something? Do we wait? Is it possible to grow at the moment? Is the strategy to hold on and not let go? Is it a time to do research, and if so, how do we do it when we are locked down?

Non-presence was one of the main challenges to continue doing research: how to do it without having people physically present and without losing the rigorousness? And it is not that online research did not exist or was not known, as it’s been around for a long time. However, it didn’t represent the everyday because, even though we were doing research online, we were still going about our lives and work in a face-to-face environment, and this somehow invited us to think that this was the only way to do it. Especially for the qualitative research team, who faced a major concern: “How do you connect with people’s sensibilities without touching them, without going to their homes, without seeing their gestures?” Sandra Godoy, Director IUU Colombia, tells us how they managed, via an online world, to find ways to get closer, to connect and to be able to gather valuable and relevant information, because ultimately we go from seeing the world through the filter of our eyes, to seeing it through the filter of a screen.

Against this backdrop, we, the market research industry, were called upon to understand the logics, tensions and needs of the new world, helping brands and businesses to adapt and take action quickly. This was what both qualitative and quantitative techniques achieved: “To keep generating insights, to prevent our clients from grinding to a halt,” says Ulises Cimadoro, and “To face the great challenge of continuing to mobilize, to keep generating research of value with other rules,” according to Sandra Godoy. The two leaders agree on the same point: do not stop, adapt, learn and generate value.

In this sense, the resilient nature of our cultures, resulting from the different situations we have historically shared as a region, enabled us to reinvent ourselves and rethink new ways that allowed us to remain efficient and innovative. This is what is highlighted by Valentina Rodríguez, leader of IUU Latam transformation: “The pandemic by definition is global, and in Latin America we live through it with absolute resilience, appealing to our creativity, so as to improve processes in which the context often works against us”.

However, in order to keep going, our industry cannot do it alone, it needs brands and businesses willing to open up and think differently, and even take risks. This is where assets, built through the experience and the expertise and awareness of each agency, take on greater weight and relevance in building trust. In the case of Ipsos in particular, Ipsos’ robustness, expertise and the path already travelled in online transformation strengthened this confidence.

“Digital transformation was not something new for Ipsos, we were already talking about communities, digital studies and online platforms,” says Sandra Godoy, who also mentions how at this time of the pandemic, such studies are being exacerbated and new skills and awareness are being developed around these tools.

In this way, the three leaders agree that 2020 went from being a year full of limitations to one that accelerated processes and strengthened and consolidated the trust of our customers. It taught us to take on the industry in a different way, to be adaptive, fast and to reconceptualise ways of doing research, ways that would henceforth coexist in different roles. On the one hand, online research, not only as a cost-effective option, but with different possibilities, in terms of agility, approach and analysis. On the other hand, “Face-to-face will continue to provide a more human sensitivity and will undoubtedly remain a component of qualitative research. The contact experience will not disappear completely, but we will see an evolution in its approach,” says Valentina Rodríguez.

Finally, the two leaders of both qualitative and quantitative processes in Colombia agree that this context taught us to be more flexible, to have different cost logics, to eliminate some items in order to prioritise others that did not exist before, and to remain competitive and coherent given the situation.

Nevertheless, these costs, resulting from the new tasks, must be explained to businesses, helping them to find the value in what they are paying for and to understand what the differential is that they are being offered, in order to avoid getting into a price war, which in the end only favours the crude translation from face-to-face to online.

In order to achieve these objectives, Ulises Cimadoro reflects on the need to “Understand what their issues are, what their expectations are about cost. Just as we explain wonderfully why a design is made up of such and such, we need to be able to explain to them where these costs come from, what the added value is, and to even say, in a polite way, well, this is what I’m offering you and this is what others can’t give you”.

In conclusion, 2020 taught us that the added value, robustness and trust of our clients are the assets to keep in 2021. For Ipsos, the weight of our differentiating methodologies must be the standard and avoid the mere translation of face-to-face to online. So, ultimately, 2020 proved to be a teacher rather than an executioner.


@Nodar77 via Twenty20

NEWS FOR THE CLIENTS

TECH…VESTIGATION

Víctor Villalba
Account Director - Brand Health Tracking

From the moment we open our eyes every morning, we face an increasingly technological world, don’t you think so?

Just check, or at least be aware, of how you wake up every day, and for sure the answer will be “I turn off the alarm that sounds on my cell phone”, do you see? Gone are the days when we used a clock radio, and further back, those when we used that classic and elegant alarm clock. “What is this clock?” I hear some of you say.

Dear reader, I invite you to make use (again) of technology to “google” (a term not yet accepted by the Royal Spanish Academy, but which will soon be) and know what I mean by an alarm clock. It is understandable that you’re not so clear about it, because we live in a tidal wave of devices, and today, this once appealing and uniform appliance certainly does not fit.

Our business - the art of answering questions, is moving away from subjectivity and embracing objectivity with a particular interest and curiosity. It’snot far from the unavoidable effect of technology. To check this, I consulted an expert in the field. Thanks to his kind help and to the 30 minutes that opened up in his agenda, I was able to start a pleasant and revealing conversation with our IT Manager for Colombia, John David Patiño, whom I have had the pleasure of knowing since the beginning of my professional career, when I started researching markets in a prestigious local agency. But this previous knowledge I had gained was not enough, and it was through this exercise that I was able to confirm that at the helm of the Ipsos Colombia technology ship is a professional systems expert, who also has an in-depth view of business (and not only ours, John David is a MBA).

The central focus of my conversation with John David was around the opportunities and threats that technology represents for the industry. There really is no clear boundary between them, because it all depends on how the organization addresses situations where technology plays a leading role.

While this panorama could be seen as terrifying, in reality I think it is probably friendlier than we imagine. We should never forget that in any work activity, what is most valued is experience and attitude, where both opportunities and threats are faced. It is no secret that we live in a dynamic world, and of course our business is part of this. The challenges and needs of our clients, both internal and external, are changing. This view is confirmed in the interview with John, who, as soon as he arrived at Ipsos in 2012, faced the need to automate the company's quality process and therefore the opportunity to optimize processes that subsequently resulted in benefits for the end-customer. This is a clear example of how Ipsos embraced technology as a mechanism to solve a challenge that was presented.

Today, the needs and challenges of technology in our business continue to be in the field of automation. However, the role of the area has migrated towards being something more proactive and commercial, in which we assume an active role in front of our customers. We will no longer be behind the scenes working our "magic" to make it happen. Today we must be an active part of the business process and business continuity. John talks about this in relation to one of the many functions of the Business Innovation Partner project, where technology acts as another consultant and therefore a translator of the needs of our clients.

Nowadays, IT is one more arm of our commercial force, since it is in charge of complementing and understanding the needs of the client in a field of expertise and converting them into viable projects.

The current market makes this role necessary, as we find ourselves increasingly faced with more competitors that were not necessarily part of the competitive spectrum we were accustomed to. Nowadays, Twitter and Facebook surveys are becoming more viral (to use a technological term again).

Would we have ever imagined that these social networks could play such a role? And what should happen in order to ensure that our customers do not see these as viable alternatives that offer immediate results?

The precise answer to this question lies in our expertise. It is our secret weapon which we should know how to use fearlessly when faced with a possible threat of this type from competitors.

Let us imagine for a moment solving one of the usual business questions of our clients, using the speed and ease that technology can provide (for example, surveys on Twitter, Facebook and now on LinkedIn), but with all the statistical rigor and methodology we know at Ipsos. Sounds interesting, right? That is what we mean by integrating IT into a more commercial and business-related role, beyond the technical support that it usually provides. That is one of the premises or objectives pursued (from my perspective) by the BIP (Business Innovation Partner) project.

We should be able to ask "uncomfortable" questions, without any problem for those potential clients who think that the alternatives are viable ways to answer their business questions, and here that I want to leave you with a final reflection/question.

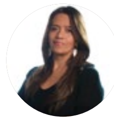
Are we able to ask our dearest customer these questions:

- What do you prefer… Speed or consistency? A guarantee for all the answers of your business strategy?
- How much would you be willing to invest if I offer you a solution to your business question that involves speed, rigor and methodological consistency?

This perhaps the most important question we should ask them, and that we should also ask ourselves.

@sotaliya via Twenty20

HEY YOU, WHAT DO YOU DO FOR ME? BRANDS WITH PURPOSE



Marcela Bello
Client Director- Client Organization

Today we live in an awakening of society that we have not seen for a long time, a new era of consciousness. People are increasingly untrusting and in turn more favorable towards change.

According to tlpsos’ What Worries the World survey , poverty and social inequality was the greatest global concern before Covid-19 hit. It remains consistently in the top-3 and much higher in specific countries. A majority say that things in their country are heading in the wrong direction. This reality is not far from the current situation in Latin America; where we have seen a lot people protesting, perhaps tired of the corruption by governments, social injustices, inequality and an innumerable list of evils. This society, it seems, wants to put up a roadblock, demanding loudly that people stop standing by with folded arms in the face of the destruction of the world.

This era has led to the birth of several currents or trends where we see, for example, a great spiritual wave that seeks to raise awareness and harmony; gurus who are focused on various life issues related to personal growth, healthy experiences and many other activisms around the globe that promise or seek a better world. For example, we have the feminist movement in Argentina and the young Greta Thunberg who has mobilized a lot people around the world against climate change.

This new focus is also no stranger to brands; consumers are in the midst of being bombarded with information that they no longer swallow whole. Today they are more informed, have greater power when choosing their brands, they demand, they buy, and they are more faithful to those who not only give them the best in terms of a product and an experience, but that also generates a positive impact on the planet.

They want the brand to do something definitive for them and for others, turning away from those that turn a deaf ear, brands without purpose - yes “purpose” - that great term that we hear in all the strategies and that we understand as the raison d’être of the brands, behind the apparent objective of being just a company to make money.

The relationship that can be generated between the planet, culture and consumers lead brands to have a more challenging purpose, which is why their definition and effective alignment is increasingly prevalent. A purpose that drives the changes necessary for the world and that people are asking for today; a purpose that is felt from the heart of the company and all the actors in its relationships. People, communities, environment, and the planet, pursuing a strategy that is oriented to the management of values and an identity that builds the true reputation of the brand.

This is what has been understood today, but is it what the consumers are really thinking?

The purposes of some brands and their CSR (corporate social responsibility) programs have been questioned by different stakeholders. For example, if a brand pollutes the environment but has a plastic reduction program, that’s not a purpose, it’s its duty. A company that produces high carbon emissions and yet it implements a tree planting program to reduce them, that is not a purpose, it’s its obligation… it is possible to list countless more cases where consumers could condemn the “worthy causes” of brands, concluding that they are only presented to distract the world from the true environmental or social impacts of their operations, thus losing the strength of the purposes that are being charted.

A REVOLUTION OF “PURPOSE”

How do we go beyond brand purpose as we see it today, taking into account the growing challenges we see around us? Because, as we know, it is no longer just about doing what we do well, or about applying our CSR programs; it is about finding the synergy between this and the real world, going from being functional to being emotional, to show a story and the efforts around it, to make the planet a slightly better place.

This is where a new opportunity for brands opens up. The key will be to convert good intentions into truly meaningful actions for society, leading to a dialogue with people to discover what we call social insights; to commit, assuming a real role for change, taking positions in the face of social, environmental and economic problems: it makes no sense to say that you care about something if you are not doing anything to solve it.

In conclusion, what can be observed is that this new approach will lead us to a more conscious consumption, changing what we know about business today, empowering people to move towards a better world, where brands will not only increase their income, but will win the minds and hearts of new consumers. This is an activist brand!

The brands directed by purposes with actions, will be those that manage to survive this new era of consciousness.

Are you ready for this new era?

@kristenvargas via Twenty20

NEW PRIORITIES FOR BRANDS AND COMPANIES IN MARKET RESEARCH

Ángela María Garcés Jaramillo
Client Director

A NEW REALITY

The arrival of Covid-19 brought with it changes in the world, some of the most radical since the World War II. The transformation in everyday life was inevitable: we learned new ways of shopping, entertaining, eating, being with family and working, among others. This prompted brands and companies to turn their strategies around in order to have first-hand information that would allow them to adapt to the new reality of their consumers and users to make decisions quickly and accurately. For this reason, market research became a priority to address the situation and what it entailed.

In this sense, questions were raised such as, what can market research companies do to add value to my brand and my company in a time of crisis? This indicates that market research is seen as an important agent in the process of adapting to the new reality and is generating new challenges.

PRIORITIES FOR BRANDS AND COMPANIES

In this order of ideas, market research is beginning to be required to navigate a river of constant change that allows rapid decision making, beyond what is known as traditional research, promoting the redesign of current tools and technologies to meet the needs brought about by the new normality.

Closeness and constant communication are becoming essential on this path of new solutions, leading to a greater demand for clear and precise information.

We found that there are three main needs that brands and companies have to meet in market research today: agility, advisory and affordability. Below, we will take a closer look at each of these:

Agility:

I dare say that agility is undoubtedly the main market research need for companies and brands, as a result of the Covid-19 crisis. Decisions need to be made faster and faster as social, economic and political changes occur. Therefore, agile research tools are required that allow companies to obtain results in shorter timeframes and generate strategies in a timely, appropriate and accurate manner.

It is key to clarify that the need for agility has been increasing significantly over the last few years; however, the economic situation has led to the need for it to be rushed.

In the same way, anticipating the problems and needs of the situation for companies is also a fundamental aspect in terms of the new requirements related to agility and time; being able to anticipate events and for companies to have not only timely information, but also information in advance, is essential.

Advisory:

The generation of added value and support for better decision making is becoming essential for companies. Market research is the first ally of brands and it is expected that, together with the results, it will show general aspects of social, political and economic changes, enabling companies to make more accurate decisions. In the same way, companies require market research companies to be ever closer and to understand their business in depth. Data with deep, robust analysis, brought into the current context, is part of their basic needs.

Affordable:

And finally, one of the main problems that companies faced at the beginning of the economic downturn was having to cut internal costs. In that sense, market research companies are required to be empathetic to the situation of brands and establish agile, non-traditional and affordable value-added solutions.

It is important to generate solutions that contain these three components in order to adapt to the new reality of brands, companies and the new way of conducting market research.

@kristenvargas via Twenty20

ARE YOU IN THE DATABASE?

Sandra Pastran
Statistical Manager

Since the beginning of the pandemic more than a year ago, one of the biggest lessons for Colombia has been the need to have a good information system to locate all citizens, to identify and track the population at risk, to inform about the benefits of policies to help in times of a pandemic and, more recently, to allocate vaccination appointments.

Sadly, we have seen in our country a large number of people who, although very much in need, have not been able to claim their benefits due to inconsistencies in the system, errors in the cross-referencing of national and local information, and difficulties in locating the population that has been exposed to a positive case. People who are alive have also been removed from the national, local or health system databases, excluding them from vaccination, and people who died years ago have also been invited to be vaccinated, causing unnecessary wear and tear on the health system.

This has made us more sensitive as citizens about sharing our information, not only with social networks but also with the state and even more so with the health system. In Colombia, a country with so much violence and high vulnerability of public/private information systems, there is a distrust of sharing personal information such as location, identification number or full name. But now it has become clear that it is necessary to provide this information in order to be recognised, to benefit and to achieve the most important goal of the year: to be vaccinated.

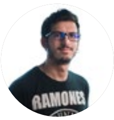
We only hope that the titanic effort that the country is making to create a better information system will allow in the future a better targeting of resources and generation of awareness, so that not only people understand the importance of correctly providing personal information and keeping it updated, but also that local and national authorities value information systems as essential elements: having the population fully identified and located within a single system will be the most valuable asset so that, in future events, there will be real big data information, with population coverage and with a high level of detail.

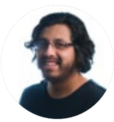
The Colombian Habeas Data law allows us as citizens to know, update and rectify all the information that has been provided to all the databases of all the country's entities, and provides for the proper, secure, reliable and targeted handling of the information. Hopefully, it will not happen again that large investments such as this one are lost because information on individuals is not consistently included in the system.

@fuelmao via Twenty20

DISRUPTIVE MARKETING

BABY BOOMERS: THE GENERATION THAT DOES NOT GET OLD


Daniel Ocampo
Research Analyst - UU, Understanding Unlimited - Qualitative


Sebastián Pantoja
Project Manager - Public Affairs


Daniela Rey
Sr Research Analyst - UU-Understanding Unlimited - Qualitative

GOLD GENERATIONS?

The Baby Boomer's generation (those born between 1946 and 1964) is a significant demographic that unfortunately seems to have been forgotten in Colombia in the eyes of marketing and research.

It is a generation whose social image has been built around social myths and stereotypes that, although in some cases are positive and associated with wisdom and experience, also are usually viewed with excessive pity and compassion. They are being perceived as old, fragile, vulnerable, lonely and outdated. Any capacity for power and influence that they may have had is ignored, which results in a passive position towards them from research agencies, media and brands, which eventually excludes them from their campaigns and strategies.

However, when we have spoken directly to Colombian Baby Boomers, it is clear that they are a generation that does not age, but remains active - mentally, socially and physically. It is a generation that has achieved a sense of self-realization, that cares for other that is looking for peace of mind, and, knows how to adapt to situations that arise, since they have had to face multiple changes through their entire life, both social and technological.

Baby boomers in Colombia even consider their current stage of life is a second youth, which they can share new experiences in their free time with family and childhood friend, because of their responsibility and planning in previous years. As opposed to the stereotype of lonely people, Baby Boomers are recognized as the center of their families, and around them they build their expectations for the future.

When reviewing official statistical sources, such as the 2018 National Population and Housing Census 2018[18] and the Large Integrated Household Survey[19], we find that the Baby Boomer population is not in the demographic and socioeconomic situation that many market researchers in Colombia imagine.

The results of the 2018 census indicate that Baby Boomers in Colombia represent 15% of the total population (7.1 million inhabitants), while in 1985, the same age range represented only 6% of the population (2 million)[20]. This population ageing in the country is also evident in the increase in life expectancy between 1985 and 2018 (from 67 to 77 years) and has been linked to an improvement in their economic situation of the Baby Boomers. In 1985, their annual income average was around USD 940, while in 2018 it amounted to USD 4,000[21].

This official data is the basis for rejecting the myths already described about Baby Boomers: they are not an insignificant fraction of the population, they are not in the last phase of their lives, and they have an income level even higher than the average income of the rest of Colombian citizens (USD 3,800). Thus, the social image built around Baby Boomers does not necessarily correspond to the reality. On the contrary, it is possible to determine that this is an attractive target market, especially as there are few brands talking to them.

A NEW MARKETING PARADIGM

There are only a few brands that have been related to them, so consequently, the relationship between Baby Boomers and brands so far has become a vicious circle, where everything starts from the existing myths about this generation.

Brand strategies deliberately decide to exclude Baby Boomers from their campaigns, considering that the costs of developing strategies that include them outweigh the potential sales benefits. This situation has generated a drastic weakening of the relationship between Baby Boomers and brands in the country. As Esperanza Young, Strategic Advisor at Ipsos, explains:

“The relationship with brands, like any other social relationship, has weakened among Baby Boomers because brands no longer speak to them. By not talking to them and taking a passive position, the Baby Boomers themselves also do not consider that they should talk to the brands, and therefore it is logical that they also take a passive position.”

Given this scenario, the direct invitation of this article is to re-establish the relationship with the Baby Boomers, to give them a place, and to direct strategies and campaigns towards them. How can this be done?

To develop powerful communications for Baby Boomers, it is important brands consider six strategic axes that can easily become creative lines:

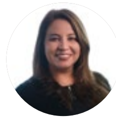
1. Communication must be constructed from the positive aspects of this stage of life and not from the negative consequences of ageing.
2. The family must be presented as the core of their lives, so they must be shown as not only sharing with them, but also as being the axis of family life.
3. Daily enjoyment, peace of mind and freedom are important achievements for this generation, and brands must be aligned with these lifestyles.
4. Baby boomers free time is active, so brands must show them as being dynamic in their use of time.
5. Communications must respond to traditional gender roles and speak to them from the area of expertise of everyone.
6. The full enjoyment of this lifetime should be encouraged. We should help them to choose the best ways to take advantage of their free time. It is all about dignifying and enlarging this stage of life of Baby Boomers.

Within this framework, the invitation for Colombian marketing is to reconnect with the country’s Baby Boomer generation. They want to be part of what is happening today. They have the time, economic resources and energy to be active consumers for long time, and they are looking for the best possible quality and comfort at a stage where they are experiencing self-realization much more strongly than the process of ageing.

Do not leave them out.[22]

@skillieskil via Twenty20

THE NEW COLOMBIAN FAMILY



Sandra Patricia Godoy
Head Service Line - UU, Understanding Unlimited - Qualitative

Until a few years ago, the family structure in Colombia was only conceived of in one way: a provider father, a caring mother, sons who would continue the family name (in the case of males) and daughters who would inherit the recipes of grandmothers (in the case of women). Although this was not entirely true, this structure existed in the collective imagination and was the social aspiration.

However, with the passing of years, both this imaginary state and the realities we face would change this. The rights claimed and acquired by women, the recognition and acquisition of the rights of gay couples, the increase in the rate of divorce, women who lead their homes[23], the new role of women in the workplace, and even the economic constraints that we have been facing have all tipped the scales towards a new concept of family structure and a reconceptualization of what is, or isn't, a family.

Nowadays, families are not always constructed in the traditional way. Whether because of unplanned situations (divorces, violence, fatigue, among other reasons) or personal decisions, we seek to live with who we really want to and not with whom the norm dictates. Although these changes have not been accepted by the whole of society, the new generations perceive them as something usual, suitable and appropriate, thus building a new family paradigm.

In Colombia, then, we find families today “like yours, mine and ours[24], families made up of same-sex couples, single-person families or with a pet (perceived as a dependent child or partner), ‘drink families’ (double income no kids), unfamiliar families[25] and countless different configurations that make us rethink and reassess the concept of the imaginary social state that has accompanied us for years.

A NEW CONFIGURATION

But how does this affect the economy of the country, business, marketing and, of course, market research?

The answer is very simple: these new configurations change the rules of the game, and just as people reinvent themselves within their families and transform the roles they play in them, consumers and buyers are no longer the same as before.

If in the past we thought about doing focus groups to ask housewives what they think about some products or brands, in categories that they were the “owners” of (food, decoration, home care, etc.), the truth is that today we do not only have fewer and fewer traditional “housewives”, but now they are not the only ones who consume, buy and - most importantly - decide on the brands they allow into their lives and their homes.

New family structures have pushed for a change of roles in the home so that there are various providers, caregivers, food preparers, and, fundamentally, various decision-makers with budgets, shopping baskets and preferences for different channels. This diversification of roles is, of course, not detached from gender, so one of the main changes is the need to stop looking at the housewife and to start recognizing and studying the home manager.

AND HOW DOES THIS CHANGE HOW WE DO RESEARCH?

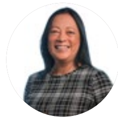
Well, we are called to raise awareness of this in the briefs we take on, in the way we approach the consideration and awareness of our consumers, buyers and decision-makers when we propose our participants, and especially in regard to the methodology.

Today, we require a method more than ever that is in places and spaces where we can see reality in detail, online or offline. It must also be amenable to changes allowing filters for our consumers, without resorting to stereotypes or clichéd perceptions that could limit us to an increasingly small group and prevent us from seeing the larger population, gender diversity, and, above all, the democratization of roles that we are playing today.

Our responsibility as experts, guardians and observers of reality is to direct brands towards an understanding of this new context, which presents unprecedented challenges for our clients, but also for the way in which we undertake our research.

@kristenvargas via Twenty20

FIVE KEYS TO UNDERSTANDING THE NEW COLOMBIAN SHOPPER



Suyvan Ley Araya
Research Director - Market Strategy & Understanding

Numerous media and opinion leaders have indicated that Covid has brought about many changes in global markets, and of course in the domestic market as well. If we focus our perspective on the shopper, on sales and on categories, we can see that the changes they have undergone are not only due to the pandemic. The reality is that the shopper has been evolving over time, but this process has accelerated from last year up to today.

The expansion of their needs changed the dynamics of their path to purchase[10], Increased their touchpoints, resulting in more empowered and savvy shoppers at both physical and online outlets. There were advances in the way we sell, and with that, new channels, technologies, selling environments and experiences were implemented. In addition, categories also evolved: based on the new shopper, they emerge, disappear and are segmented differently.

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1 It refers to the path to the purchase decision, a cycle that feeds back on itself, and also to the way in which buyers carry out these and subsequent repurchase activities..

It is safe to say that, today, the online shopping environment is essential to the shopper at all points of the experience. The possibilities of shopping online or in-store have complementary advantages that steer a path to the connected sale. So, what's the key? The integration of composite solutions to gain profitable shopper insights.

HOW TO UNDERSTAND TODAY'S SHOPPER?

Accessing strategic insights is possible by applying a holistic approach to the business, the fundamental objective of which must be to understand the shopper and the size of their purchase. Decision-making revolves around the purchase of the product, therefore it is not a linear process, as it varies depending on the occasion, the need, the time of day, the channel and the choice of shop. In other words, shoppers may interact in different ways depending on the category and the brand.

Let's always keep in mind the five stages of the shopper's decision process:

1. Initiation: identify what stimulates purchase and planning.
2. Exploration: capture patterns of information-seeking behaviour and category perceptions.
3. Channel selection: measure what leads to a preference for one channel over another.
4. Conversion: Understand how to transform prospects into buyers.
5. Experience: open up opportunities to generate additional category and brand growth..

At each step of the decision-making process, consumers gather information and are influenced by the process. In that sense, no aspect of that decision can be isolated and analysed without placing it in context and reviewing the shopper's experience at each stage. With that in mind, the holistic framework should be designed to help clients understand the decision-making process and identify the need for shopper research.

Within this context, we have researched the shopper over time using all possible methods:

- Focus groups (face-to-face focus groups or online workshops).
- In-depth interviews (face-to-face or online interactions).
- Anthropology at the POS.
- Navigation studies within the POS.
- Observation at the gondola.
- Intercept surveys inside and outside the POS.
- Decision studies based on conjoint techniques.

We must not lose sight of another essential point about the shopper: when intuition intervenes in the decision making process. According to what we have been studying in recent years with Daniel Kahneman's model,[11] through System 1 (implicit and intuitive) and System 2 (explicit and rational), the shopper, when faced with a saturation of decisions, uses their intuitive system and then rationalises their choice. System 3 is now also in the picture: the centre of regrets and doubts (see Professor Houdé's studies in France, analysed by Ipsos global teams).

For this we have at our disposal the use of technology, where we can simulate gondolas and real shopping environments, as well as virtual shopping experiments, to understand the shopper's decision process and above all to measure the intuitive system.

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2 Daniel Kahneman, "Think fast, think slow", 2011. Kahneman is the father of behavioural psychology and winner of the Nobel Prize in Economics in 2002.

THE OTHER SIDE OF THE COIN

On the other hand, acquiring so much shopper information also has another facet, which is the challenge our clients have been facing for years: how to apply it strategically in their businesses.

To obtain efficient results that optimise the consumer experience, our recommendation is always to check which data is most relevant, so that valuable insights about consumers can be obtained: what motivates them to consume and why they actually make the purchase.

Having a 360° view of the market is also essential and involves developing well-structured and disaggregated consumer insights to understand the demands and purchasing behaviour of today's and tomorrow's consumers. Thus, it is necessary to translate insights into action by transforming big data into smart data; market research approaches must be applied in an innovative way, using all relevant data sources in order to gain as holistic a perspective as possible. In that sense, the challenge of understanding shopping behaviour really comes down to finding the essential information and using it to create profitable and rewarding relationships.

CONCLUSIONS

To succeed in the attempt, we need to test and learn how to optimise the information we have at our disposal. Successful implementation of shopper marketing strategies relies on insights and scenario trials, and this is where simulations become increasingly useful.

Thus, my recommendation is:

- Obtain real and comprehensive information about what is actually happening at the point of purchase.
- Connect reliable market data (KPIs) and a compelling approach to test and compare the impact of alternative scenarios.
- Translate this data into insights that generate change in shop or shelf design.

So, let's not lose sight of these new ways of understanding the shopper and use technology to complement our existing research methods!

necessary to translate insights into action by transforming big data into smart data; market research approaches must be applied in an innovative way, using all relevant data sources in order to gain as holistic a perspective as possible. In that sense, the challenge of understanding shopping behaviour really comes down to finding the essential information and using it to create profitable and rewarding relationships.

WINNING THE BATTLE FOR THE CONSUMER ATTENTION

Constanza Segura
Head of Creative Excellence in Colombia

In a world of constant evolution, where technology opens multiple opportunities to connect with each other, where there are more and more ways to access content, and in which the opportunity to interact with brands takes place in contexts that could hardly be imagined just a few years ago, advertising also evolves, changing the game in regard to the task of reaching the consumer - a consumer who is increasingly informed and more critical.

Connectivity, multiscreen media consumption, access to information in the palm of your hand, and advertising in unexpected formats, among other factors, have generated a battle for consumer attention. This consumer is now not only a spectator, but also has the possibility of interacting with brands and advertisers. Although opinions differ, it is estimated that a consumer may be exposed to about 5000 daily stimuli, which makes standing out increasingly challenging for an advertiser.[26]

TIME AND EXPERIENCE

The consumer also has the power to decide what they want to see, and at what time, with or without audio, live or delayed, or in conditions that are most convenient for them depending on their interests and context. This establishes both challenges and opportunities. We know that if the consumer manages to establish a link with the content, it can be a powerful amplification instrument (in good times and also in bad ones). If, on the other hand, this connection is not made, the message could be diluted within the endless content the consumer is exposed to, without generating any effect.

Therefore both the vehicle used to reach audiences, and the message that you want to deliver, must be powerful enough to capture their attention in very short windows of time.

In this context, advertisers and agencies have sought new forms and formats to connect with the consumer, facing conceptual (value and strategy) and technological (media segmentation, big data, artificial intelligence) challenges in order to achieve this. This means trying to find a good balance between what the brands say (strategy) and how they say it (creativity).

The communication strategy is the basis of communication and is vital in the development process. Having the right message is also essential. In order to do this, knowing the consumer will allow agencies to identify tensions that the brands could take the opportunity to resolve, thus delivering a different and relevant message for their audience. Communications lacking a relevant and/or unique message significantly decreases the likelihood of success.

A good strategy aligned with business objectives will make it easier for the brand to assign the appropriate roles to each medium, allowing it to maximize its reach and optimizing resources and efforts in an environment where media and audiences are increasingly fragmented.

In this puzzle, creativity becomes a key element as it allows brands to stand out from the advertising noise and the explosion of stimuli consumers are exposed to every day.

THE POWER OF EMOTIONS

Experiential advertising puts the consumer at the centre of the strategy. Here, their senses and emotions connect them with the brands through their experiences, which then allows them to establish a defining emotional bond that makes them feel unique and special. These experiences make advertising meaningful by resonating with iconsumers' lives and being memorable. This promotes changes in attitude or behaviour towards brands, in both the short and long term, which definitely achieves better results for advertisers.

Additionally, consistency allows for validity and continuity, making sure the essence of the brand is present at the different points of contact and over time. The choice of the media chennels where the brand will be present, its speakers, its messages, the construction of brand cues and the language used to communicate must all be completely aligned with the brand strategy.

In the midst of this changing, technological and fragmented environment, it is important to encourage the search for new spaces and new creative proposals in which the brands can take advantage of the immediacy and interactivity offered by the media and the possibility to personalize messages to establish close relationships with the consumer and trigger the desired response.

Brands also have the opportunity to be more open and genuine, creating collaborative links with the consumer that can improve the quality of communication, through functional and emotional benefits that facilitate the construction of equality over time. This is how having a clear and well-defined strategy, built on relevant insights, can be the basis of success.

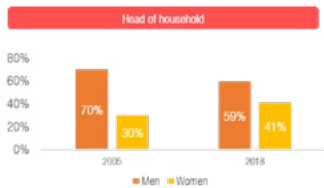
It seems, then, that rather than just facing challenges, we are facing an era of opportunities, where creativity can make a difference for brands in how they go about engaging with consumers.

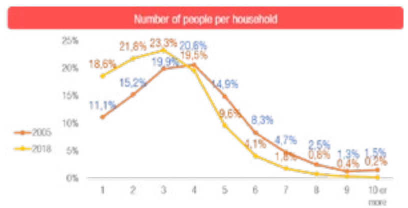
AN APPROACH TO THE CONSUMER 2021

María Molina
Service Line Leader - MSU

Staying relevant in a changing world is a permanent challenge that producers and retailers face every day. Today, this challenge is more pressing than ever as we face a different consumer, with new expectations, needs and ways of acting. A consumer who, after a year of confinement and restrictions, makes more informed decisions today, based on more analysis.

A consumer who is critical, demanding, aware and open to experimenting and trying new things. A consumer with i) changing habits derived from new health trends, ii) changes in family composition and roles in the household, iii) and greater access to information.





HEALTHY HABITS

In recent years, we have observed a growing awareness of food as a key determinant of good health. As the "Ipsos Global Trends 2019" report indicates, in a world with high levels of concern about health and well-being, Colombians consider their eating habits to be the most important thing for maintaining good health (89%). Due to the pandemic, this relationship has been reinforced, and Colombians are among the most food-conscious people in the region[10].

Based on the above, there is a trend towards changing eating habits. 54% of people have adopted a lighter dinner in the evenings (Ipsos Colombia Retail Study 2018), and every day more Colombians are rejecting foods considered harmful, such as gluten (23% vs. 19% globally, Brazil 25%, Mexico 33%), and foods with high sugar content (54% vs. 46% globally, Brazil 50%, Mexico 45%). While Colombia still lags behind in trends related to vegetarianism and veganism with only 1% (Ipsos Global Trends 2019), in 2020 there was a significant growth in the consumption of plant-based products and alternative diets of different types and a consequent reduction in the consumption of red meat.

As part of this health trend, exacerbated at every level by a fear of disease, there is an increased adoption of 'superfoods' (food supplements such as seeds with high vitamin and mineral content), as well as healthier snacks and foods that help boost the immune system. Confinement has led to a reconnection with eating at home, sourcing food and looking for alternatives that have less impact on the planet.

Thus, a greater supply of healthy products on the market is evident. Today, these products make up 14% of the family basket: ". The healthy segment is growing by 6.8%, i.e. 6% more or six times more than the general basket, which is increasing by 0.8%" [11], with special displays or dedicated areas at points of sale and more information about fat and sugar content, among others, on packaging and shelves.

3 https://www.portafolio.co/tendencias/que-tan-importante-es-para-los-colombianos-la-alimentacion-saludable-545678

4 https://www.larepublica.co/consumo/siete-de-cada-10-personas-quieren-mas-productos-saludables-2783999

The macro trend in health & wellness [12] also generates greater demand for transparency and authenticity regarding product ingredients and demands for clarity in labelling. As a result, as consumers migrate towards healthier options, producers are forced to restructure their offerings and offer new alternatives in line with new trends.

THE DEMOCRATIZATION OF CONSUMPTION AND INFORMATION

In addition, the globalisation of the economy and the consequent democratisation of consumer goods, as well as unlimited access to information, have led Colombians to become more demanding consumers. Today, faced with a situation of high uncertainty, economic crisis and health concerns, the Colombian consumer is looking for convenience, in its broadest sense, linked to agility, access, cost-benefit ratio and ease of choice. So it is expected that retailers and brands will adapt to them with information at their fingertips, multiple distribution channels offered according to their needs, a variety of payment methods and clarity of information.

Traditionally, Colombian consumers were limited in their access to products, both from the point of view of availability at points of sale and their economic capacity. However, the arrival of hard discount stores has allowed the development of more democratic consumption, in which, regardless of purchasing power, more "exclusive" or imported products are within everyone's reach. Small points of sale, with a simple but varied offers, at affordable prices, where the brands have lost their relevance and the cost-benefit ratio is clearer for the consumer.

With the advent of hard discount stores and greater access to information, they began to question more forcefully the way they shopped and the cost-benefit ratio of many products. In this sense, 73% of Colombians believe that brands are just an excuse to charge more. Despite this, 41%[13] of consumers still buy

5 https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-01/keeping-it-fresh-web.pdf

6 Ipsos Global Advisor 2019

branded products, reflecting a certain amount of trust in brands. However, they demand better value for money, not only in terms of product quality, but also in terms of experience, values, transparency and sustainability. In addition to the across-the-board growth observed in retail in the last year, the increasing economic constraints, the increasing value for money of the hard discount store offer and the development of new channels have led to even greater growth in the retail sector [14].

At the same time as these changes, we are facing greater connectivity, thanks to which consumers have become experts, have greater access to information, to the opinions of other consumers and influencers, which makes them more knowledgeable and therefore more critical and demanding: “If a product or service gets a lot of good reviews, I will try it (76% vs. 66% overall)”. This is how the Amazon effect arises, thanks to which consumers increase their expectations, have a greater number of options and greater awareness of prices and offers, which makes them question more the real value of traditional brands. On the other hand, access to information is also related to the social and environmental impact of products and/or brands in a society, particularly for younger generations, which demands transparency and contribution.

We are talking about a greater questioning of the value of branded products, and this is where an interesting phenomenon is taking place in contrast to hard discount: the growth of premium brands. The expert, informed consumer is also looking for better experiences and quality, better ingredients, less impact on the environment and is willing to pay for it. In addition, having so many constraints in today’s life, they seek pleasure in the little things, [15] where premium brands also achieve a better performance. Small pleasures [16] that do not affect the family budget significantly and that feed the soul, thus achieving a greater emotional connection with the consumer. In order to take advantage of these spaces, it is of fundamental importance to understand the role of the product and the brand offered in them, and the consumer’s level of need. How can I achieve greater perceived value from a greater connection with the consumer and thus avoid getting into a price war?

With this in mind, we must be very careful not to link the development of private labels only to the search for lower prices and understand that it is associated more with giving the right value for money. As consumers become more informed, they will always seek to maximise their returns, and so it has forced brands to respond to their questions and face new challenges.

CONCLUSIONS

It is evident that Colombian consumers are at the forefront of global trends in terms of healthy eating habits, convenience, environmental awareness and connectivity, all of which have been maximised by the recent economic and social context, and which make them more demanding when it comes to choosing their products, channels and points of sale. In a context of economic crisis and restrictions, the challenge will be even greater for producers and retailers to ensure that their offer has a clear, honest and transparent value proposition to maintain their place in the market. It is ultimately about understanding the consumer, their changing needs, barriers and constraints and, in response, offering greater value in the shopping and consumption experience.

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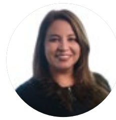
7 https://www.portafolio.co/negocios/los-supermercados-low-cost-seguiran-con-su-expansion-544618

8 https://www.ipsos.com/en/how-grow-premium-brand-during-recession

9 ESTADO EMOCIONAL DE LOS COLOMBIANOS, Efectos del Coronavirus en la cotidianidad – Estudio Ipsos 2020.

FROM PET-FRIENDLY TO PET-INCLUSIVE



Sandra Godoy
Head Service Line UU - Understanding Unlimited - Qualitative

In a world in which pets have become increasingly important in people's lives, it is interesting to note how even here in Colombia, this phenomenon has led to the appropriation of spaces that were considered until some years ago the exclusive domain of humans.

It is that pets have ceased to be simply pets but have become an important part of the nuclear family and are sometimes even considered the non-human children of the house[27] - an assertion that could sound somewhat romantic and trivial if it were not for all the economic and communication/marketing implications that it entails.

THE IMPLICATIONS

Let's talk first about the economic implications. Today we find different business sectors -offline and online-, insurance, pharmaceutical, hospitality[28], food, pet grooming, personal care, cosmetics, schools, kindergarten and many other start-ups inspired by pets being included in budgets that were previously only marked for human members of the household. They are betting on an industry that moves millions of dollars a year[29] and apparently has a lot of potential to develop[30].

Now, if we talk about communication and marketing, we have to refer to the millions of dollars a year that have been mobilized via the significant number of messages that include pets in a familiar, emotional and even paternal tone. The purpose of these messages is to raise awareness of the latent and explicit needs of these important beings and to satisfy needs that go from the most basic, “what happens if my pet gets sick?”, to the most ornamental, “we need furniture that our dear Toty can use, with made to measure height and that matches the style of our house”.

But what are the implications for a business that seems to have “the wind behind it”, growing exponentially and without major restrictions? The answer lies in understanding not only how pets are increasingly relevant in the household budget, but also in the re-evaluation of a family concept that includes pets as part of itself[31], rather than simply as very dear company.

The pet-friendly trend refers to a market that seeks to be inclusive. However, this does not seem to be enough for pet lovers (mums and dads of hairy creatures) who want the market and the world in general to recognize their animals as part of their families and to be treated as such. This means moving from a pet friendly concept to a pet inclusive one.

But what implications does this have on everyday life? A tangible example is found in shopping centres; today many of them call themselves pet-friendly, in fact it is more common to find places with this denomination than without it.

But dissent arises as a result of certain restrictions that these sites impose. These have to do with cart rental, access only for some breeds or sizes and diaper use, among others, that make people think of discrimination, intolerance or that it’s simply a business without a real interest in the welfare of pets.

PETS, PART OF THE FAMILY

On one occasion I was doing a cultural immersion in a well-recognized shopping centre in the city of Bogotá, observing the visitors’ entrance to the place, when a lady, who seemed to be arguing with the doorman caught my attention. In this quarrel, the lady claimed that she had to rent a cart in order to enter the place with her pet (a dog of medium height and very cheerful face).

After an exchange of words, the lady came to the following conclusion: “This is as if you were to charge me for entering with my children, this makes no sense”. In that moment, it was evident that it was not only a pet for this lady, but her dog was part of her family and so she was demanding the same treatment and consideration that she would have had, had she had another family member with her.

In this way, it is understandable that for different businesses it is not enough fofr them to call themselves pet-friendly, as it is not only about allowing the entry of pets, but about being operationally prepared. In addition, they need to have services, spaces and offers that demonstrate inclusive treatment and an interest in these loved ones.

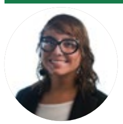
Another case that demonstrates what it means to be pet-inclusive is what the hotel chain Grand Hyatt Bogotá has done. There, canines are received with a personalized bed with the name of the dog on it, a food plate, hygienic rugs and toys. They also have a fairly clear service position: “We understand the role that pets have in the lives of our guests. It is our intention to spoil them so that they can also reside in a luxury hotel,” the establishment said in a statement[32]. This implies the clear perception of the pet as an integral part of the family.

Finally, although many of our brands have been building, through their products, communication and marketing, a pathway towards a more pet-inclusive world (with our support, of course), some of these brands still need our help to arrive at a deeper understanding of the concept.

We need to understand how the families that have included their pets as part of themselves work on designing real and functional solutions adapted to their needs and lifestyles, understanding the pet not only as a private individual, but also as an active member of the family group.

A POINT ON HEALTH

“4:20” FOR MEDICAL CANNABIS



Catherine Aragón
Account Director UU - Understanding Unlimited - Qualitative
Worked at Ipsos until 2020

The stereotypical image of the frequent marijuana user, also called a “marihuanero” (pothead), brings to mind a character not only to be distrusted, but one that is also immoral and to whom antisocial behaviours are attributed.

In Colombia, the consumption of marijuana has been perceived and communicated through derogatory labels, whose meanings shift between harmful to health and harmful to society. The path of the debate on the legalization of the substance for medical and therapeutic purposes has been constructed within this scenario. However, the boundaries between recreational, religious, criminal and medicinal use are still unclear and unknown.

The varieties of marijuana used for therapeutic purposes are different from those used and consumed for recreational purposes. Did you know that? I didn’t.

Before writing this article, I was like the average Colombian, for whom recreational and medicinal marijuana were the same, the only difference being the purpose of consumption: for some, to fight chronic pain caused by difficult to handle diseases and medical conditions, and for others, for the psychoactive and relaxing effect that the plant produces.

The emerging industry that is working to promote medicinal cannabis is struggling to establish differences, at least symbolic and symptomatic, that allow us to make a distinction regarding the consumption of recreational marijuana. Businesspeople and entrepreneurs who have opted to develop the industry are undertaking a titanic task to move away from the stigma of drug traffickers and drug addicts that is often associated with the producers and consumers. In the health sector, we don’t talk about marijuana, we talk about medicinal cannabis. And we don’t talk about consuming users, nor about potheads, but about patients.

The general lack of awareness about the differences, benefits, effects and implications of the legalization of cannabis as a therapeutic treatment could be explained by this “strange” attitude that Colombians have regarding the drug issue, and as such, to the problem of drug addiction.

The stigma that has accompanied several generations of Colombians, from the seventies to the present, has been established in the collective imagination through that image of drug traffickers that we are identified with abroad.

TO DEAL OR TO LEGALIZE?

Is it that same image that we seek to separate ourselves from that prevents us from recognizing and advancing discussions about the legalization of cannabis? Could it be that we continue to believe that by legalizing the therapeutic uses of the plant we will be branded as drug traffickers or drug addicts – and give people reason to do so?

Projected figures show that the cannabis industry could be at the end of this year, even more profitable at the employment level than, for example, the iconic Colombian flower business, approaching 99 million dollars, and thus offering a new alternative for the economic development of the country[33].

In a recent study conducted by Ipsos in 26 countries on five continents, the relationship between the use and consumption of products/services was investigated under the premise of “morally acceptable”. It showed that, globally, cannabis/marijuana is the least accepted substance (28%) compared, for example, with the acceptance of spirits (62%), tobacco and cigarettes (32%), gaming and betting (31%) and even pornography (29%).[34]

Especially, in Colombia, perceptions and opinions about the legalization of medical or therapeutic cannabis have been driven more by the emotional rather than by the rational. Some 70% of interviewees agree that marijuana has a medicinal value, however, when the topic is deepened in a timely manner, participants are asked to indicate their positions regarding the legalization of cannabis. At a global level, and in terms of acceptability,

Colombia moves from 8th place to a modest 12th place out of a total ranking of 26 countries. While 65% of respondents believe that cannabis should be legalized for therapeutic purposes, if it were legal for these purposes, only 54% would dare to ask their doctor about its benefits and treatments.

420 AND TABOOS

The expression 420 is part of the cannabis language and has established itself as an international symbol that represents the commitment and solidarity in the fight to legalize marijuana for recreational purposes.

In the beginning, 4:20 symbolized the time of a get-together to smoke cannabis, but in the last decade it has positioned itself as the date on which every year, on April 4th (the international day of marijuana), its use and its culture is celebrated. The demonstrations and expressions of support around 420 in Colombia have been developed mostly by social networks, where people publish indirect messages about the day and the media undertake a retelling of the history of this number.

Meanwhile, expressions of symbolic and social recognition of the use of medical cannabis have been quite timid and limited to congresses and exhibitions organized by the producing industry. Colombia is still a conservative and traditionalist country which punishes and avoids publicly exposing symbols and expressions such as the “smoke-a-thons” seen in other cities around the world.

Medical involvement and mass communication remain hidden and unknown to the general public.

As has been seen, the ordinary Colombian feels some shame and worry about blame when it comes to the possible legalization of cannabis production and consumption, even for therapeutic use. It seems that the weight of our history has denied us the possibility of discussing and developing the issue. It has given a moral perspective that prevents us from legitimizing, or even initiating the debate. Therefore, it is difficult for Colombians to accept from a scientific and non-moralistic point of view the benign benefits of cannabis in terms of health treatments, not to mention the advantages that it could provide to the national economy within the next five years.

We have suffered shame and profound pain, but with a nationalist passion we have emerged to demystify the notion that we are a version of Pablo Escobar. We defend the fact that our country and its people are much more than the reduced vision from the international collective imagination: narco-traffickers, parties, whores and drugs. With that same zeal we must also recognize the benefits and advantages that come from the drops, ointments, infusions, creams and other cannabis products, without continuing to be stereotyped as consumers with the traditional image of “potheads”.

SOCIAL TRENDS AND THEIR IMPACT ON HEALTH SYSTEMS

Juan Carlos Satizabal
Director Service Line

It is estimated that the average longevity of the earth's first inhabitants was little more than 35 years, and that this remained largely unchanged until around 150 years ago. In recent times, there has been a strong upward trend in the life expectancy of people globally. This trend is not alien to Colombia: from 1975 (65yrs) to 2019 (77yrs), there has been an increase of about 12 years in the life expectancy of its inhabitants, a figure that is expected to continue to grow.

The prevailing way of life of today's population, dominated by sedentary lifestyles and poor eating habits, will lead to an epidemic of chronic diseases that governments will have to deal with. This of course creates pressure on health systems that will see an increase in demand for their services. This will be driven by advances in diagnostic processes and medicines, more informed patients playing a more active role, and more people having greater access to health services.

It's not just about physical health: mental health must also be considered. Last year, Ipsos published the Global Mental Health Study, which draws on different aspects to measure perceptions of the importance of mental and physical health for people in more than 29 countries. The study indicates that 76% of Colombians are often concerned about the state of their mental health, which has traditionally been a neglected issue by both patients and the system. More than half of Colombians say that mental health disorders should be treated like any other illness, and that they should be given the same importance by the medical establishment.

Every day, Latin American countries are abandoning prejudices regarding mental illnesses and recognising that psychological as well as physical disorders should be treated in the same way. In addition, it is important to highlight that the perception of this problem is increasingly raising awareness and leading people to take action to confront and treat it appropriately.

In addition, the availability of information allows patients to be increasingly critical and to demand better services from their healthcare systems. Ipsos conducted a global survey to evaluate citizens' perceptions of the quality of the healthcare systems in their respective countries.

Colombia ranked 21st, well below countries with scores of around 70% such as England, Malaysia and Australia, of course with more developed economies and larger budgets, but still above other Latin American countries such as Brazil and Peru.

Despite these results, we must also bear in mind that we have a healthcare system that achieves coverage of close to 98% of the population. Out-of-pocket spending is low compared to other Latin American countries, and the Ministry of Health has made significant progress in regulating drug prices, covering high-cost treatments (cancer, autoimmune diseases, cardio-metabolic disorders, rare diseases, etc.). This has been achieved through the benefits plan and care pathways that allow access to more timely procedures.

However, adjustments need to be made to the system because, despite the fact that the nation's health budget is increasing year on year, the increase in demand for these services puts its sustainability at risk. Undoubtedly, processes must become more efficient, through the testing of the true value of new treatments, the integration of technology and diagnostics for treatments, and involving patients in the management of their wellbeing and health care.

There are great opportunities for our perception of the system to improve, but for this to happen we need the different stakeholders in the system to work together. This task should not only be the responsibility of the Ministry of Health.

Public entities such as Invima or the Superintendencia de Salud (Superintendence of Health) can speed up their treatment approval times and improve citizen care, especially when there are abuses and obstacles,

respectively. From the Administration of the Resources of the General System of Social Security in Health (ADRES), the flow of money to insurers and providers can be improved by making direct transfers to verify its operation. From the EPSs, it is important to have standardisation of health services, as long as the IPSs implement methods aimed at a better service to the patient. The pharmaceutical industry must also play an active role, delivering innovation, supporting the IPS, specialists and patients through its support programmes. And the population needs better health care, based on protection and prevention. It is a humanisation process that is being worked on, but in which there is still a long way to go.

Nonetheless, it is clear that the health situation may be set to worsen in the medium to long term as a consequence of the Covid-19 pandemic. In a survey of more than 2,500 doctors in Latin America from different specialties in October 2020,[10] over 70% felt that, due to this state of health, their patients had become more sedentary and their eating habits had worsened, and others mentioned that the situation also affected the patients' emotional health by increasing anxiety.

On the other hand, although at the beginning of the pandemic the figures were higher (61%), by October 2020 the number of patients in Latin American countries had fallen to 35% as a result of fear of infection in health centres, and similarly many patients discontinued surgical procedures. This certainly raises alarm bells about what will happen in the medium term with higher demand for health services.

In this scenario, more than at other times, the joint efforts of the above mentioned entities from the private and public sector are necessary. The objective must be to work on plans that contribute to access to medical appointments, diagnoses and therapies, in conditions that guarantee patient safety and maintain continuity of treatment, especially while the vaccination process is underway in the country.

10 FINE Research, "Impacto de la pandemia en la práctica médica en América Latina", octubre de 2020.

@nicolnic via Twenty20

SONG

DE DONDE VENGO YO

Where I'm from
Things aren't easy but somehow we manage to survive
from where I'm from
We're in a permanent struggle and we get what we want
from where I'm from
Nothing good is ever mentioned but things have lightened up
from where I'm from
There's heat, cold and rain.

Where I'm from
There are loaded platinum and gold mines
We are kings in biodiversity
Constant gabble among neighbors
And talent for sports… let's not talk

Free translation of an extract of "De donde vengo yo" (From where I'm from) by ChocQuibTown (An Afro-Colombian music band that combines traditional folklore rhythms from the Colombian Pacific Coast with urban rhythms like funk, dancehall, and hip hop)

END NOTES

1. https://www.kiwibot.com/about-us
2. https://www.elespectador.com/noticias/bogota/los-desafios-de-bogota-para-ser-la-mas-inteligente-de-america-latina-articulo-881257
3. It is a Chilean idiom used in language, which replaces the expression: do you understand me !?
4. Pronoun used to refer respectfully towards one person to another, but with some sympathy or affection.
5. According to the definition of categories of municipalities given by the National Planning Department (DNP), these are remote municipalities, with low participation in GDP, low connection to the main cities, social indicators are also low and with many problems related to the armed conflict.
6. Ipsos Global Advisor. Fieldwork: December 21, 2018 to January 4, 2019. Base: 18,800 online surveys of people between the ages of 16 and 64 in 27 countries (500 people in Colombia).
7. https://www.oas.org/es/cidh/prensa/comunicados/2015/137.asp
8. https://colombiadiversa.org/base-datos/nacional/
9. https://www.sfcolombia.org/documentos-y-fotos
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15. Survey about Rights of LGBT Sectors, 2014
16. https://projusticiaydesarrollo.com/2017/09/01/los-derechos-de-las-personas-transgenero-en-colombia/
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19. Large Integrated Household Survey - 2018. Información general. Access on December 4th 2019: http://microdatos.dane.gov.co/index.php/catalog/547
20. National Population and Housing Census 2018
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23. https://profamilia.org.co/investigaciones/ends/
24. 55% of children in Colombia live with adults other than their parents . Social Trends Institute. Mapa Mundial de la Familia 2014. Taken from http://www.socialtrendsinstitute.org/upload/2014_WorldFamilyMap_SocialTrendsInstitute_spanish.pdf
25. https://observatoriodefamilia.dnp.gov.co/Documents/Documentos%20de%20trabajo/D3-tipologias-evolucion_dic3-(1).pdf

26. https://www.larepublica.co/empresas/al-dia-una-persona-recibe-entre-3000-y-5000-mensajes-publicitarios-2730745

27. In single-person households, 18.1% of pets become their only company, according to data from the 2018 population census conducted by the Dane.

28. According to data from Aloft Bogotá Airport, nearly one hundred and fifty pets stayed with their owners during 2018. Recently, Hoteles Estelar adopted a pet friendly policy throughout the country and allows guests to stay with their dogs or cats.

29. In the first half of 2018, exports of food and pet products totalled USD 17.5 million, 32% more than in the same period in the previous year. Procolombia data.

30. In 2023, families' spending on items and services for their pets could reach 5.43 billion pesos, which would be related to the food segment and expenses on other products and services. Euromonitor figures.

31. The expense of Colombians for their pets was included in the new measurement structure of the Consumer Price Index (CPI) that will be in force for the next ten years, with the inclusion of consumer products and services in the basket measurement from DANE.

32. Portfolio. "Pets, business that would move $ 3.5 billion this year". Taken from https://www.portafolio.co/negocios/mascotas-negocio-que-moveria-3-5-billones-este-ano-532462

33. El Tiempo. "revenue of US$ 99 millones will be generated in 2020 from medicinal cannabis". Taken from https://www.eltiempo.com/justicia/conflicto-y-narcotrafico/estudio-de-fedesarrollo-sobre-los-empleos-que-genera-la-marihuana-medicinal-414136

34. Ipsos Global Advisor. Fieldwork: November 26 to December 7, 2018. Base: 18,638 online surveys of people between 18 and 74 in 27 countries. Colombia (500 Cases).

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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide a total understanding of society, markets and people.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.

Ultimately, success comes down to a simple truth:

You act better when you are sure.

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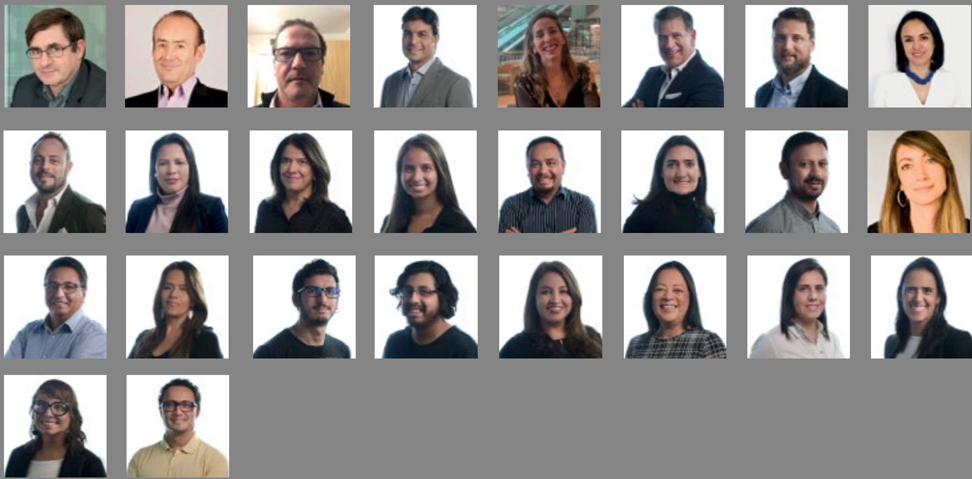

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Nuestros expertos están muy complacidos en presentar la tercera edición de Ipsos Flair Colombia.

Gracias a su trabajo, usted podrá aprender como llevar estudios un paso adelante y descubrir los verdaderos valores y expectativas de los colombianos, en donde la evaluación converge con la intuición