



Growth
from
Knowledge

Los límites de la experiencia digital

¿Cómo hemos cambiado?

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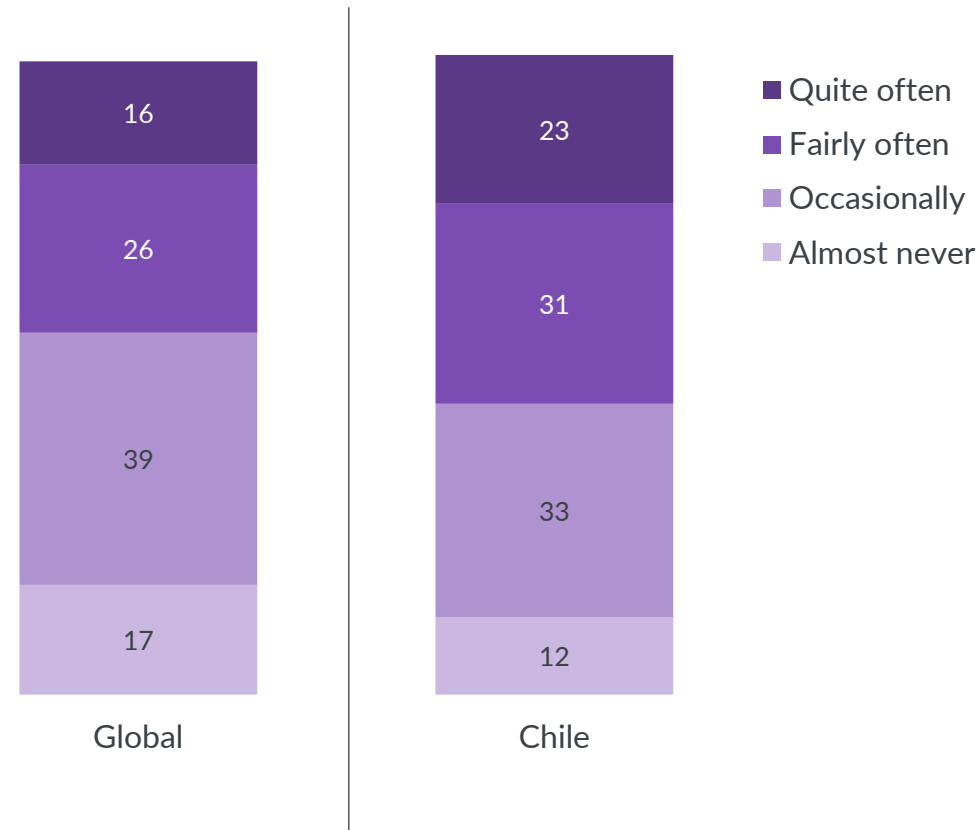


Health | Frequency of stress



How often would you say you personally feel stress and tension?

(%)





Lifestyle | Economic events

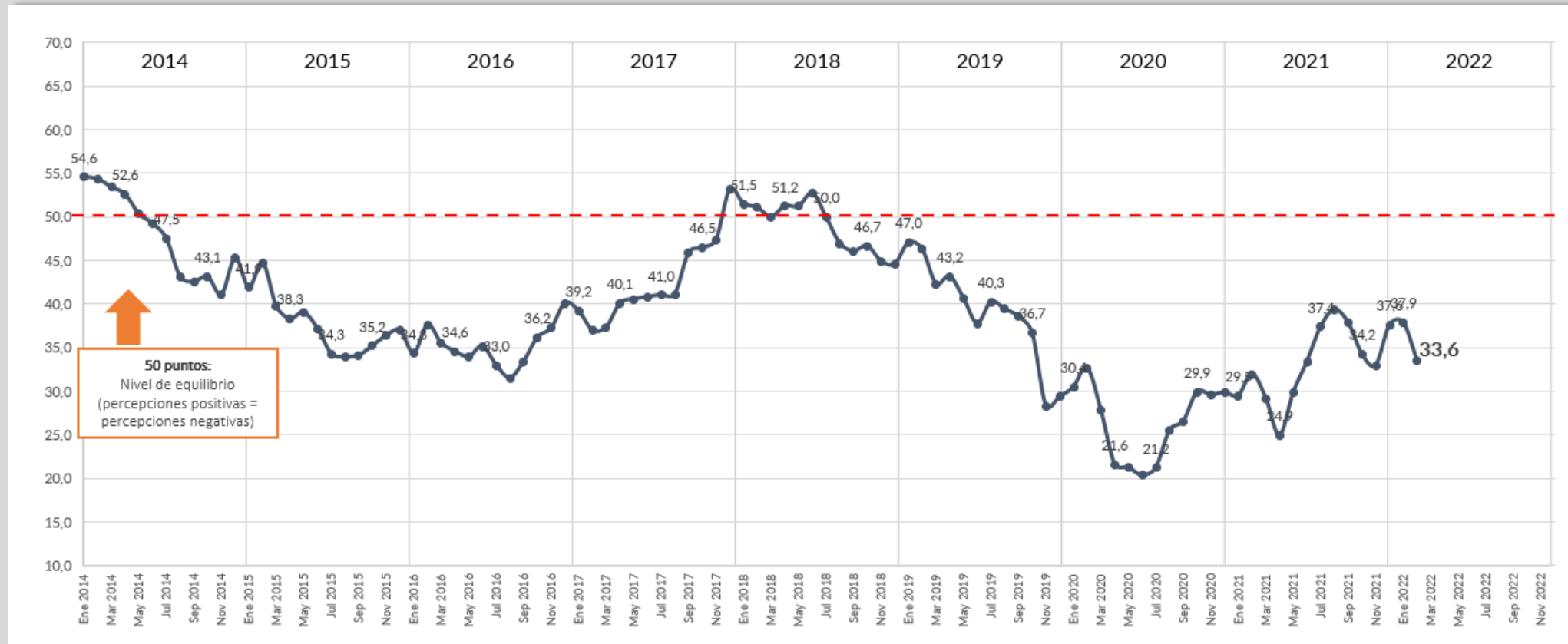


Have you, or has anyone in your household, experienced any of the following in the past twelve months?
(2011 and 2021)

2021 %	Global	Chile
POSITIVE EVENTS (net)	37%	30%
Job advancement (new job, promotion, bonus, etc.)	20	15
Increasing value of savings and investments	19	12
Financial windfall (inheritance, gaming winnings, etc.)	10	12
NEGATIVE EVENTS (net)	55	71
Job distress (job loss, layoff, cut in pay or hours)	26	41
Decreased value of savings and investments	25	29
Difficulty paying monthly bills	24	37
Difficulty paying off credit / debt	18	27
Housing distress (loss of home, difficulty paying rent or mortgage, difficulty buying or selling home)	12	12
NONE	23	13

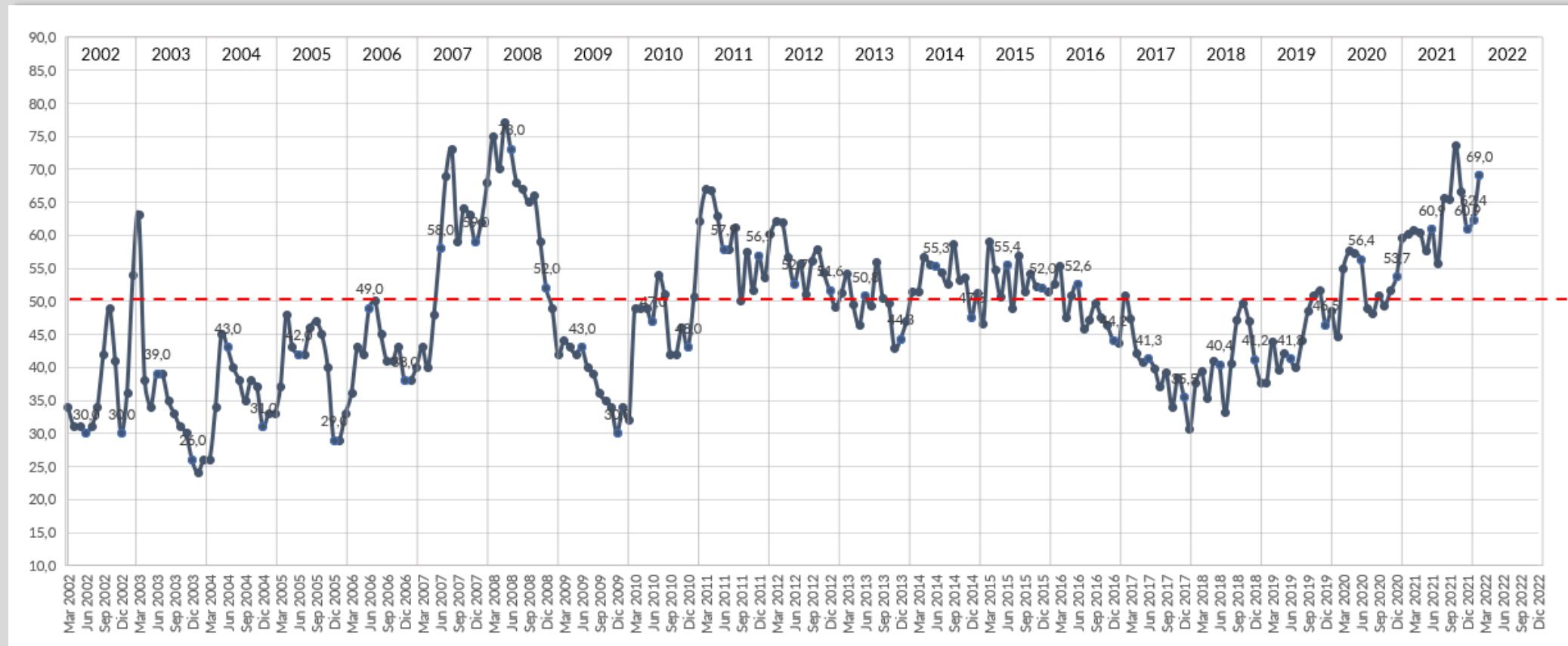
La percepción económica aun se encuentra en un territorio tremendamente pesimista

Índice Percepción de la Economía



Y la percepción de alza en los precios se encuentra en uno de sus niveles más altos

Expectativas de inflación



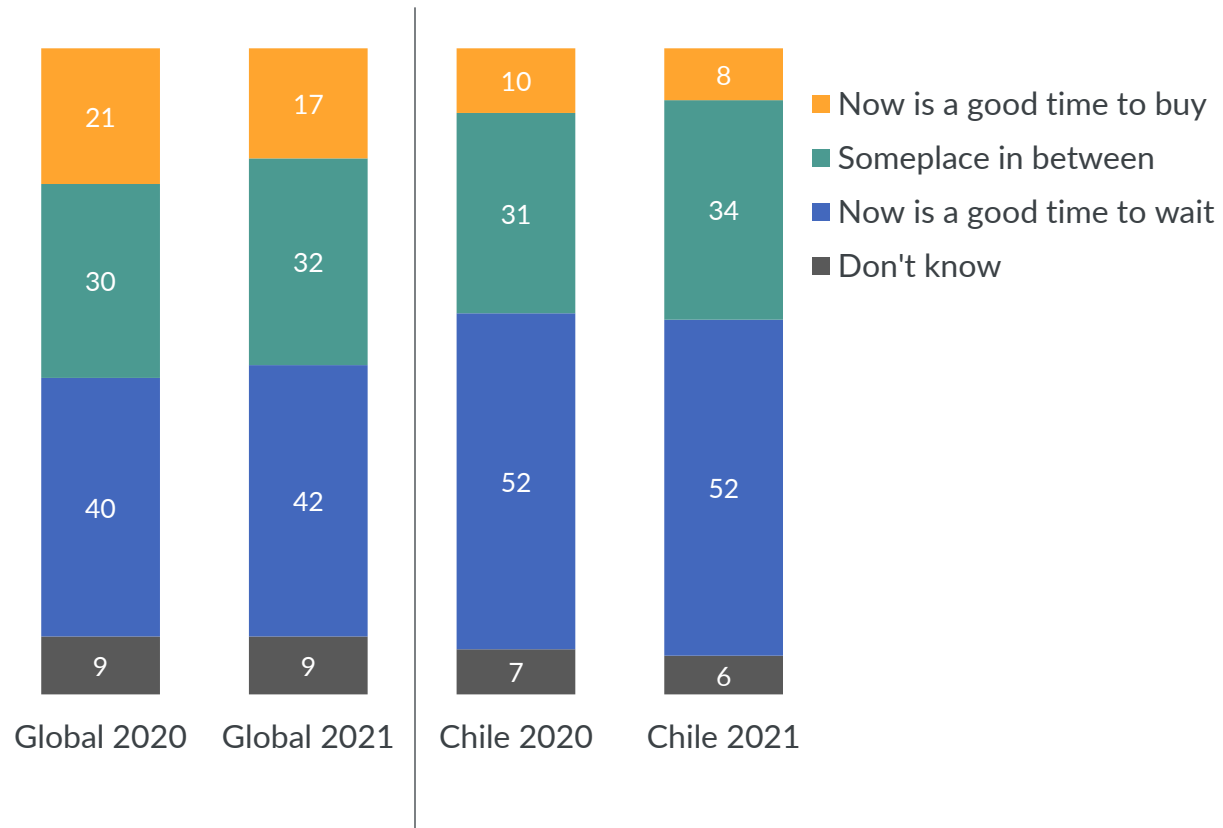


Mood | Buying conditions



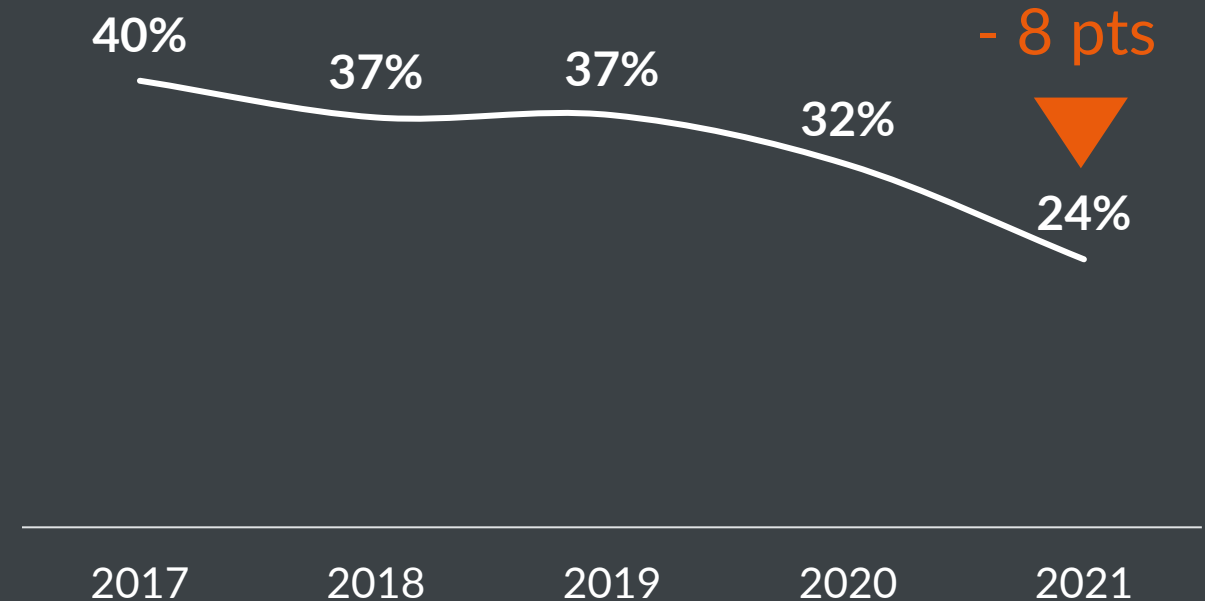
Considering both the availability and cost of things today, as well as your present financial circumstances, do you think...?

(%, 2020 and 2021)



Nunca habíamos
estado ante un
consumidor tan
insatisfecho

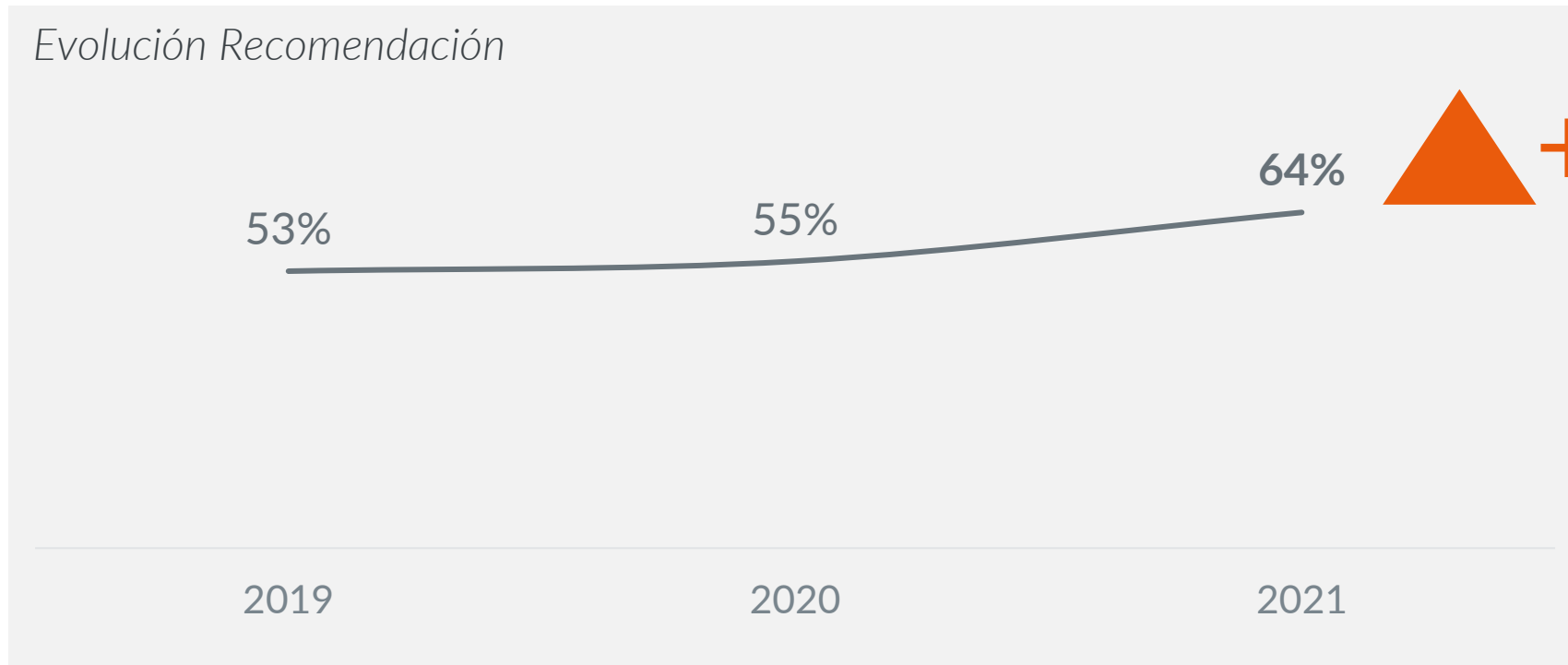
Satisfacción consumidor



Y nos preocupamos más que nunca de contarle a nuestros cercanos cuando tenemos una buena experiencia



Obligando a la marcas a ofrecer una mejor experiencia



▲ + 9 pts



Deseos de Consumir

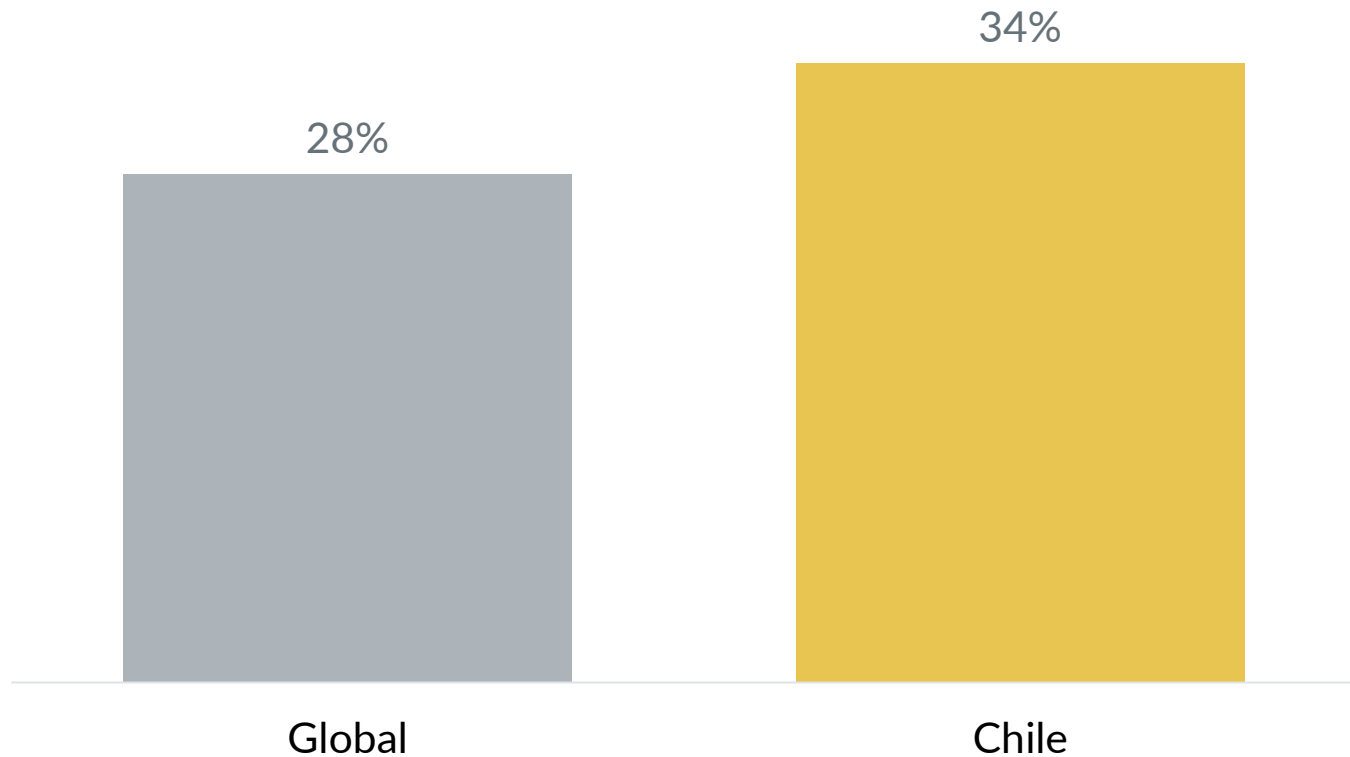
El consumo como esperanza de felicidad



Impulse shopping



% buying 'more than planned' (Last trip – All categories)



FB_05: Thinking about the last time you purchased [CATEGORY], did you....



El encantamiento con el online

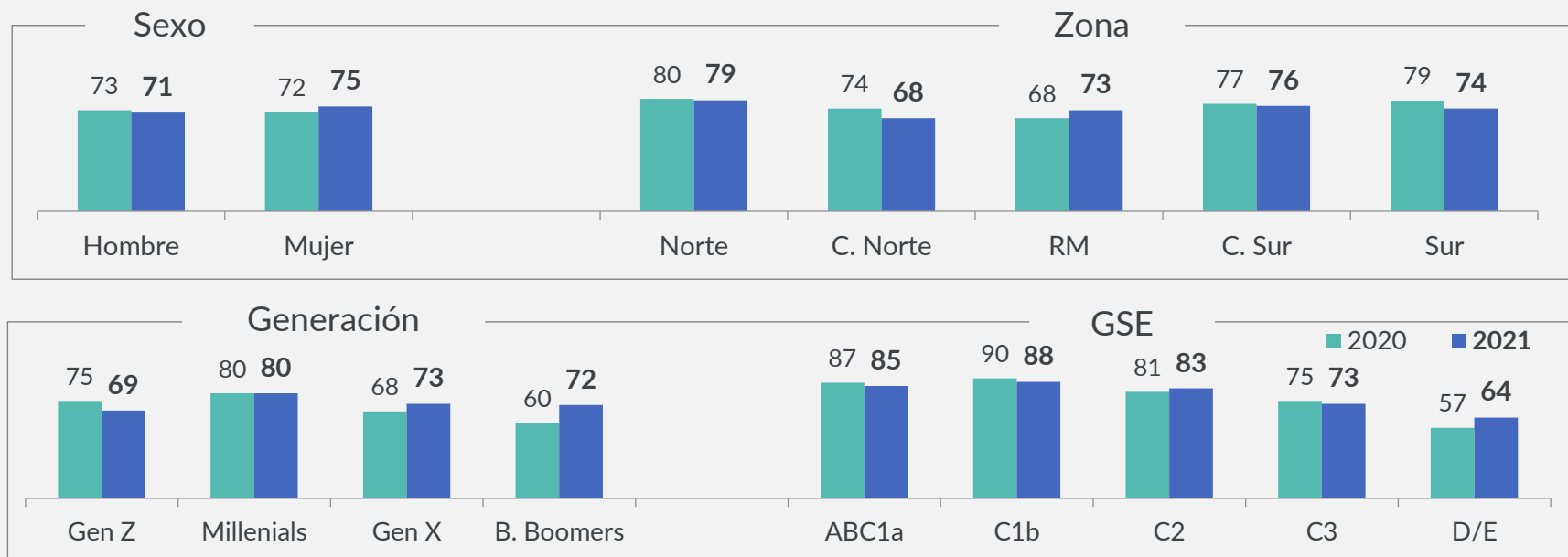
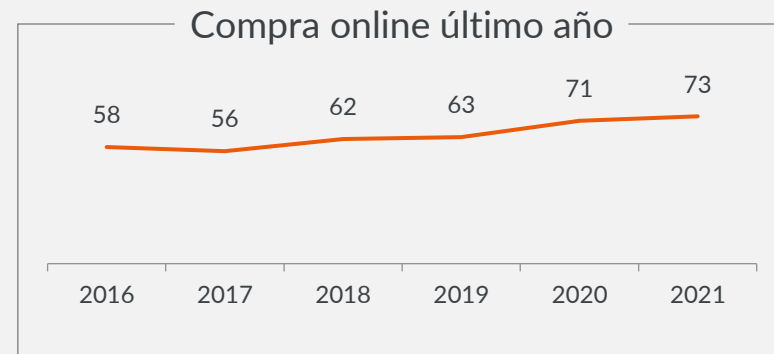


Ha comprado online

73%

La compra online ha llegado para quedarse

...y de forma transversal entre los distintos niveles sociodemográficos

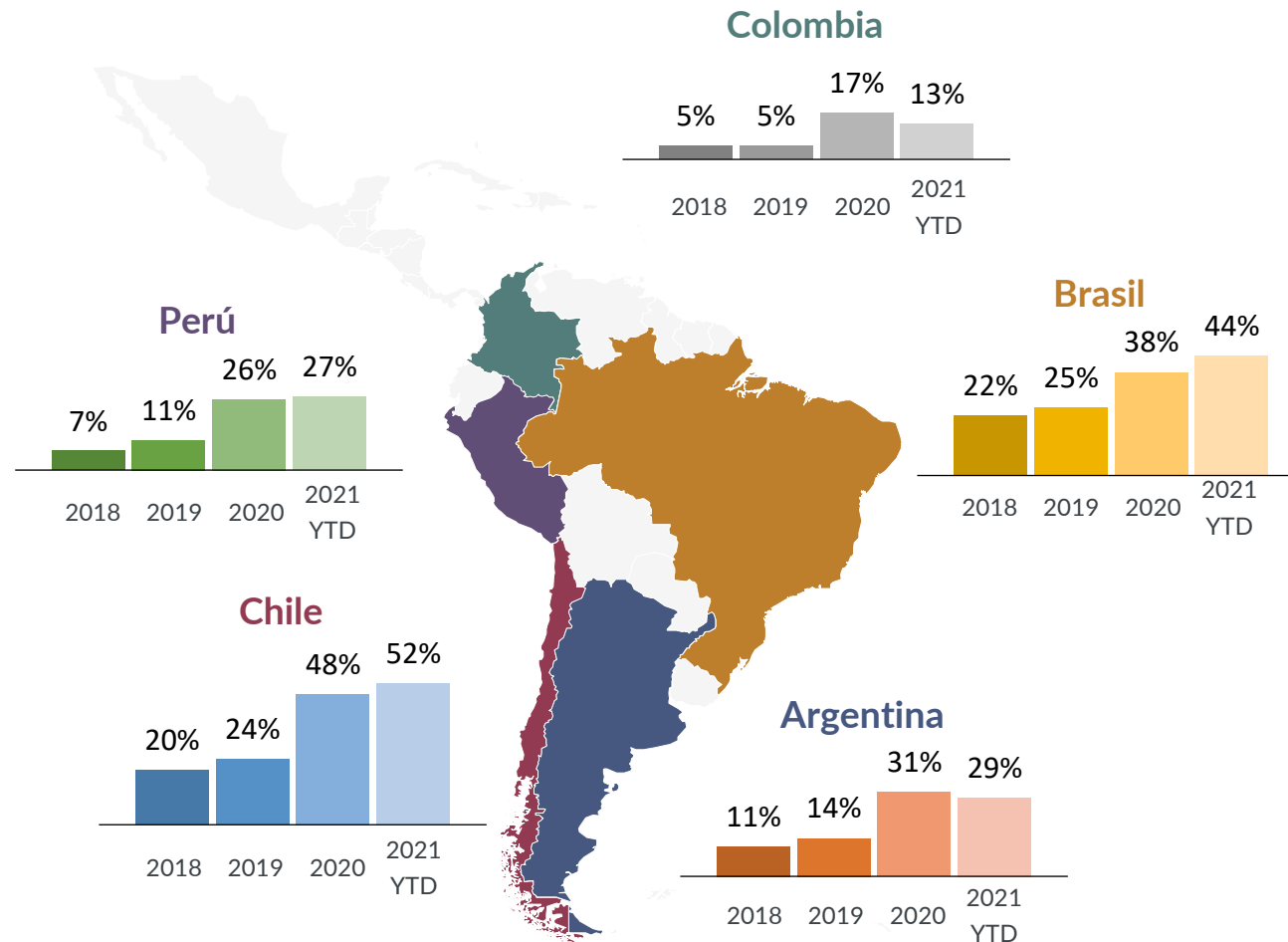


Base - 4765 casos: Encuestados que utilizan internet -
3765 casos: Encuestados que han comprado online el último año.

* Serie histórica calibrada por metodología 2021

Zoom in LATAM | 2021

Importante aumento en la venta online en latam el 2020 que se instala.



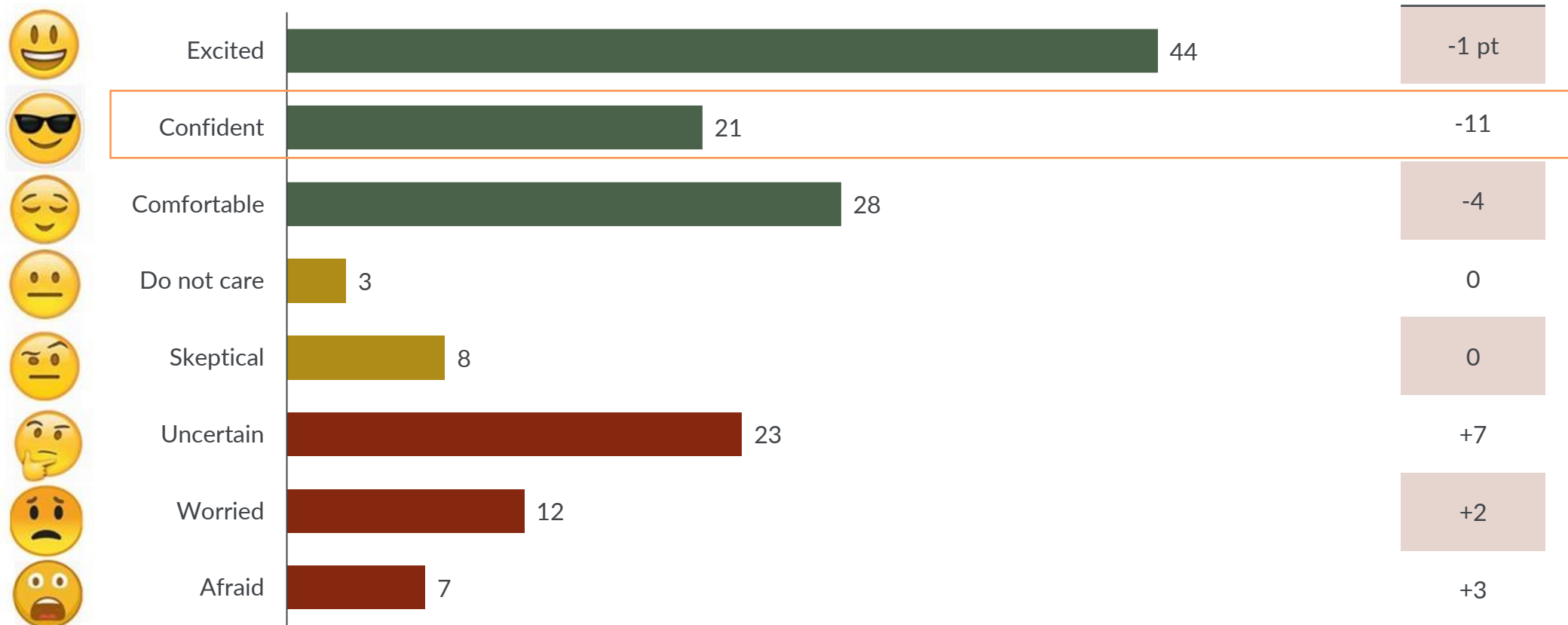


Attitudes | Tech feelings



How does technology make you feel about the future?

(%)





Online encuentro de todo

42%



Porcentaje de chilenos que consideran que hoy puede encontrar de todo por internet, + 15 ptos que en 2020.

Oportunidad para la Omnicanalidad

Los retailers y marcas ahora pueden ofrecer mejores experiencias en línea que en las tiendas físicas



Source: Consumer Insights Engine : All countries excluding China. All products. Q3/Q4'20. Thinking about your purchase experience, how likely would you be to recommend [RETAILER / OPERATOR] to a friend or colleague?

Shopping channels



How categories were shopped (all categories)

■ Global ■ Chile



FB_02: Thinking about the last time you shopped for [CATEGORY], how did you shop?

Online and offline purchase factors



In-Store



	Global	Chile
Let's me see and feel the products before I buy	42%	44%
Can get products sooner	39%	40%
Shopping is faster	38%	41%
Save money (better pricing, deals)	35%	39%
Shopping is easier	35%	41%

Online



	Global	Chile
Save money (better pricing, deals)	47%	45%
Offers free delivery	44%	43%
Shopping is easier	40%	33%
Shopping is faster	34%	32%
Better selection	29%	16%

FB_08a : Thinking about the last time you were deciding whether to purchase something online versus in a store, and **decided to purchase in a store**, what factors were most important in driving your choice to purchase there? Please select up to 5 items.

FB_08b Thinking about the last time you were deciding whether to purchase something online versus in a store, and **decided to purchase online**, what factors were most important in driving your choice to purchase there? Please select up to 5 items.

Nuevo punto de encuentro entre
emprendedores y compradores

57%

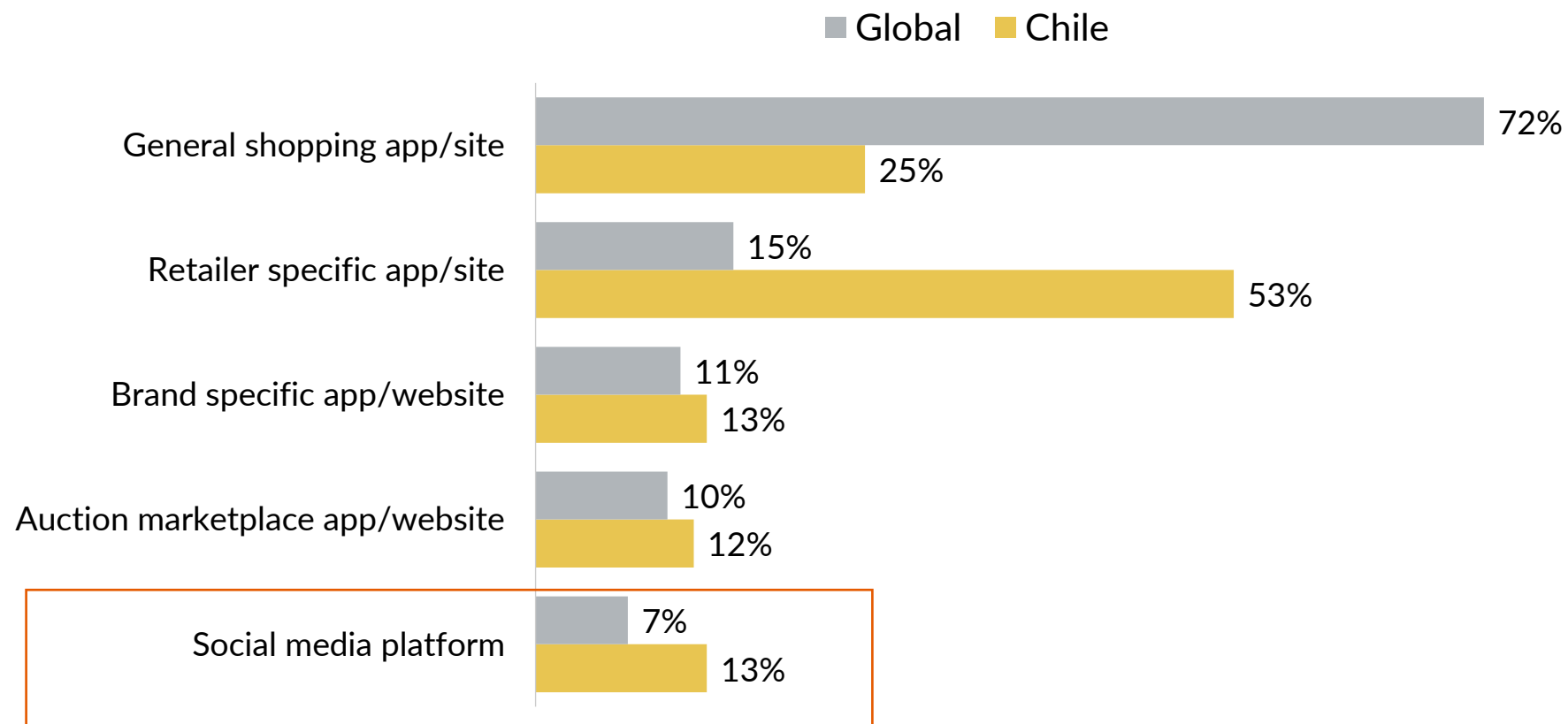


Ha comprador por alguna red social, como Facebook o Instagram, abriendo un mundo de nuevas oportunidades para pequeños emprendedores. De quienes debieron emprender por la pandemia, el 76% declara que vende sus productos por redes sociales

Online purchase channels



Top 5 Online purchase channels (all categories)



FB_04a: When you shopped for [CATEGORY] on this occasion, did you make a purchase?

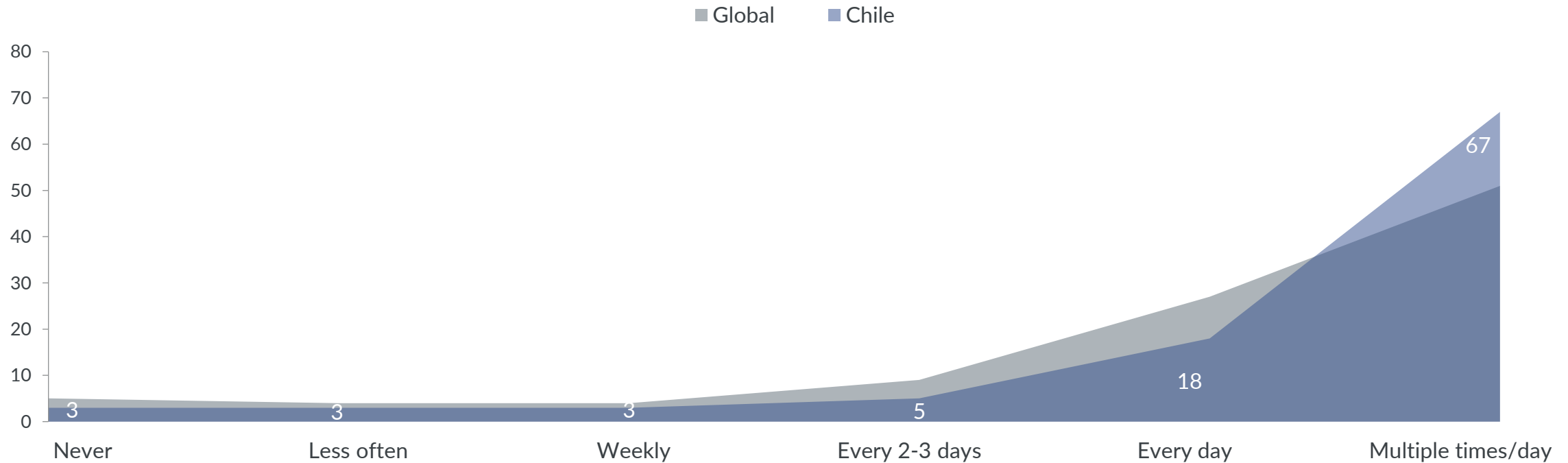


Technology | Frequency of social media visits



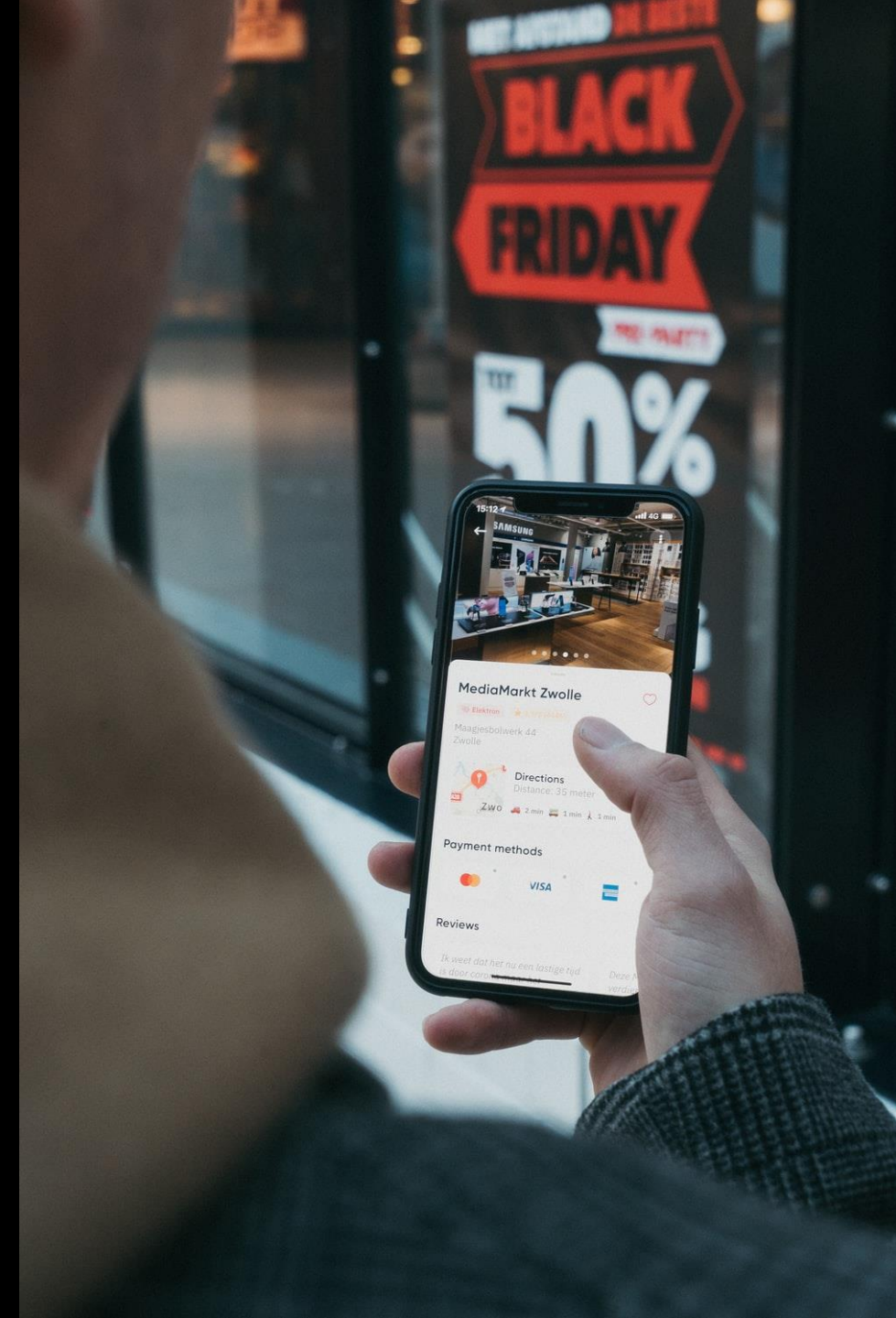
How often do you visit social media websites and/or apps like Facebook/Instagram, etc.?

(%)



Borderless shopping Y la nueva normalidad

- Compras 24/7 en cualquier lugar
- Onminicanalidad con intensidades diferentes
- Repensando la Digitalización: dinamismo, nuevos needstates y fronteras difusas con el offline



SOCIAL COMMERCE

LIVING SHOPPING



El social commerce es una **forma de comercio online que utiliza las redes sociales como un canal más de ventas**, tanto de productos como de servicios.

Consiste en generar ventas en tiempo real

Viya, a livestreamer mais popular da China



Incluso con nuevas experiencias de compra, apalancadas en las Redes Sociales

Transformar el viaje de compras

Incidencia de compras en redes sociales %

Uso de **botones 'compradores'** en Social Media

17%

BUY

Gen Z 30%, Millennials 23%

Developing Asia 50% (China 60%), Global 40%

Click **shoppable posts/stories** on social networks

13%



Gen Z 30%, Millennials 21%

Developing Asia 36% (China 42%), Global 29%

El comercio de transmisión en vivo recibe otro impulso durante COVID-19

Google Shoploop: una plataforma de compra en video, "canal de telemarketing para influencers"



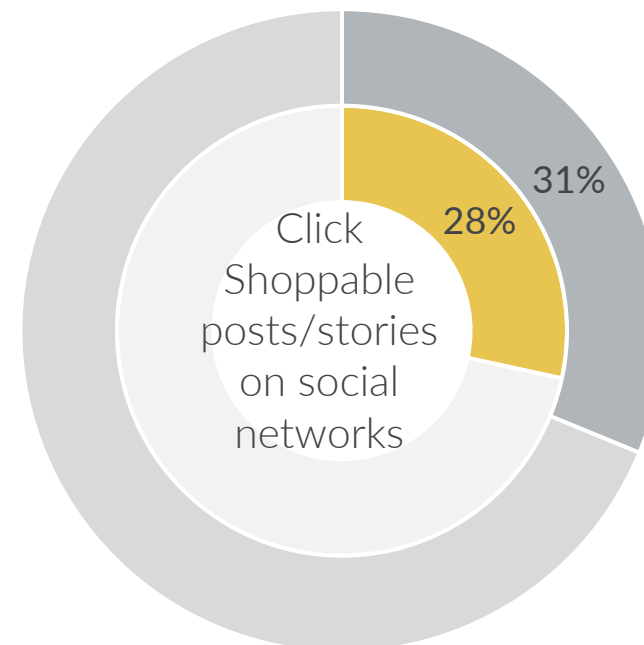
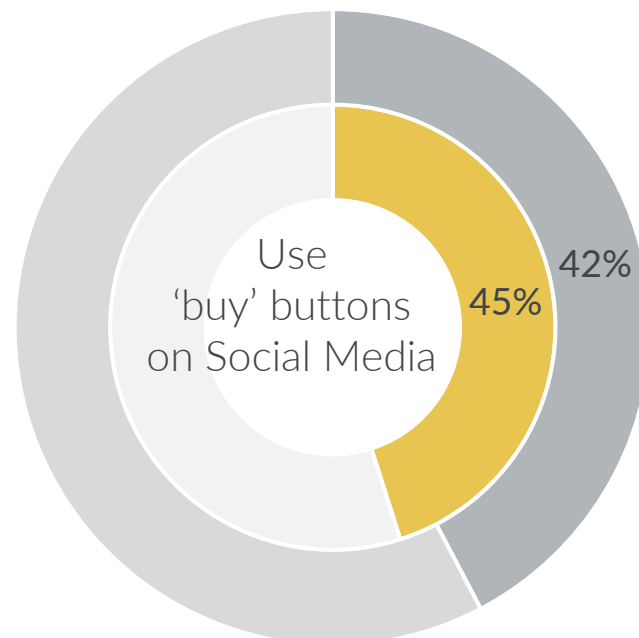
Source: GfK Consumer Life, Tech & Digital Lifestyle 2020 study (Europe = BEL, FR, GER, IT, ESP, SWE, UK)

Social media shopping

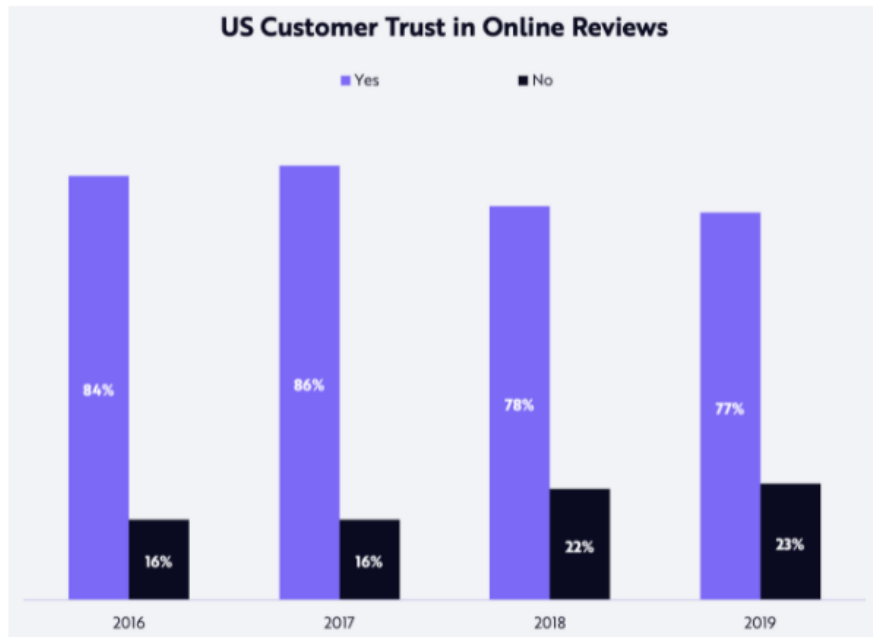


% incidence

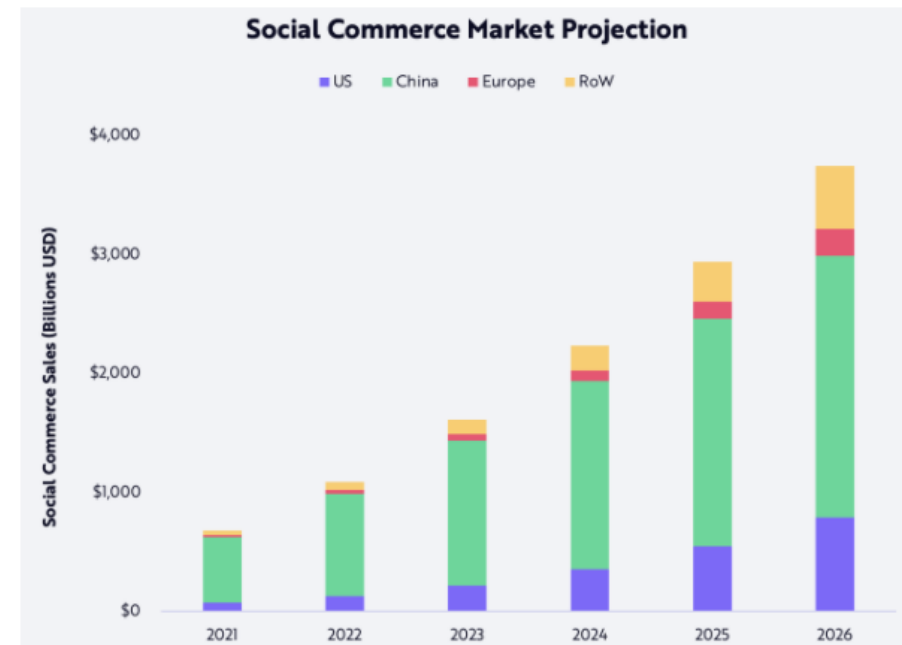
Global
Chile



Implementado correctamente, el social commerce combina la conveniencia del online shopping con la credibilidad de la recomendación de los pares.



Sources: ARK Investment Management LLC, 2021; BrightLocal, 2021.



Source: ARK Investment Management LLC, 2021

Social media attitudes



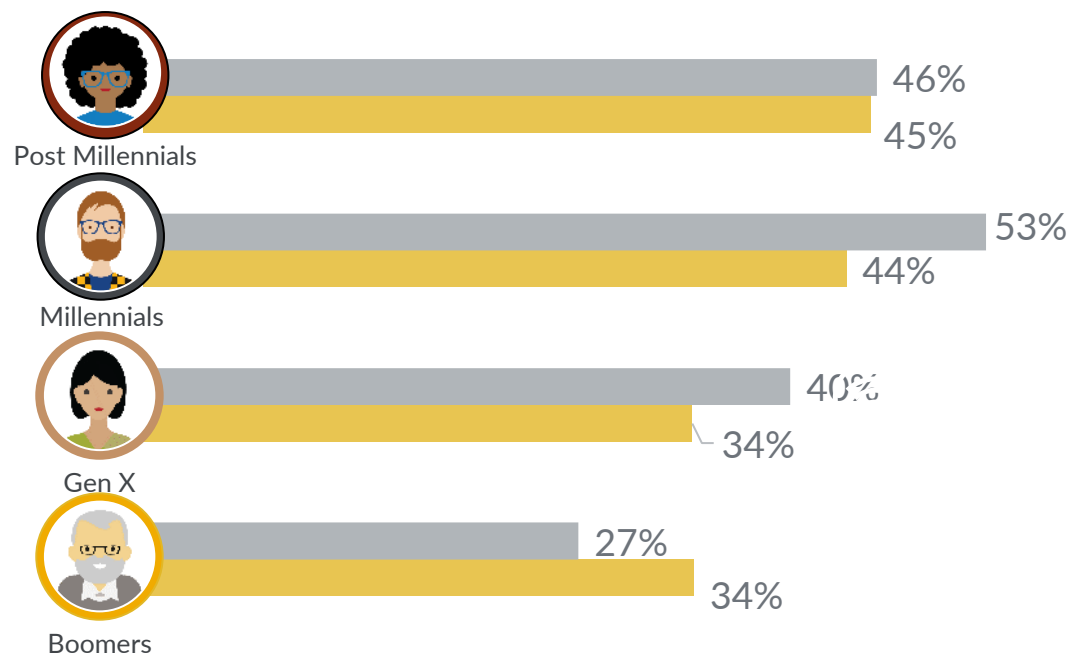
Social media shopping attitudes

(% Agreeing - t2b)

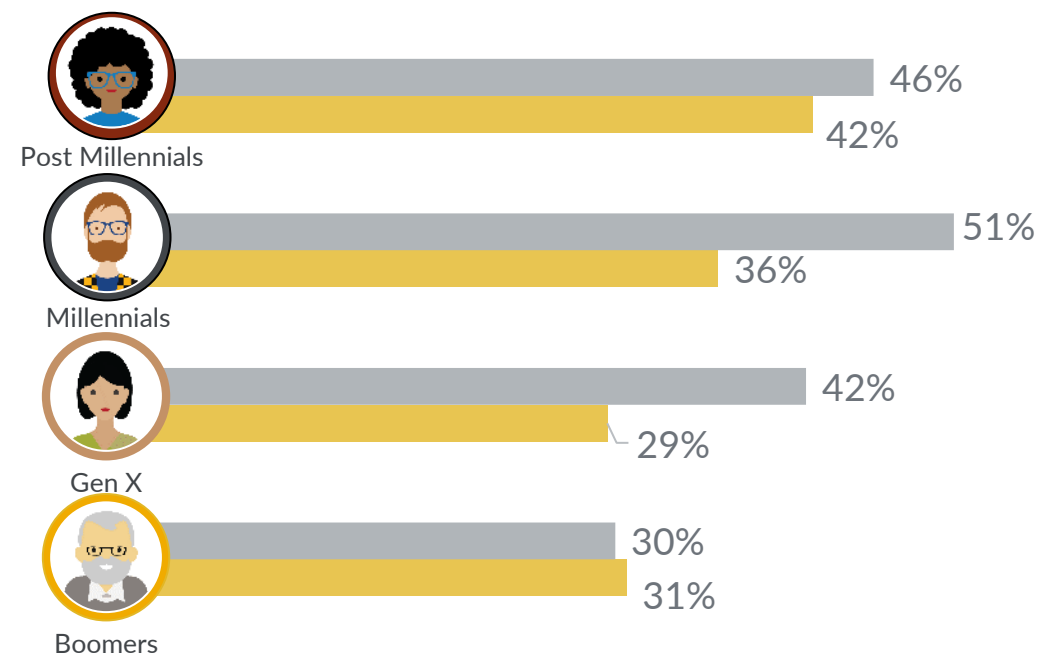
■ Global

■ Chile

*"Social Media shopping is **fun**."*



*"I get targeted with **best products** on Social Media"*



FBS_2: How much would you agree with the following statements?

¿Y el futuro?





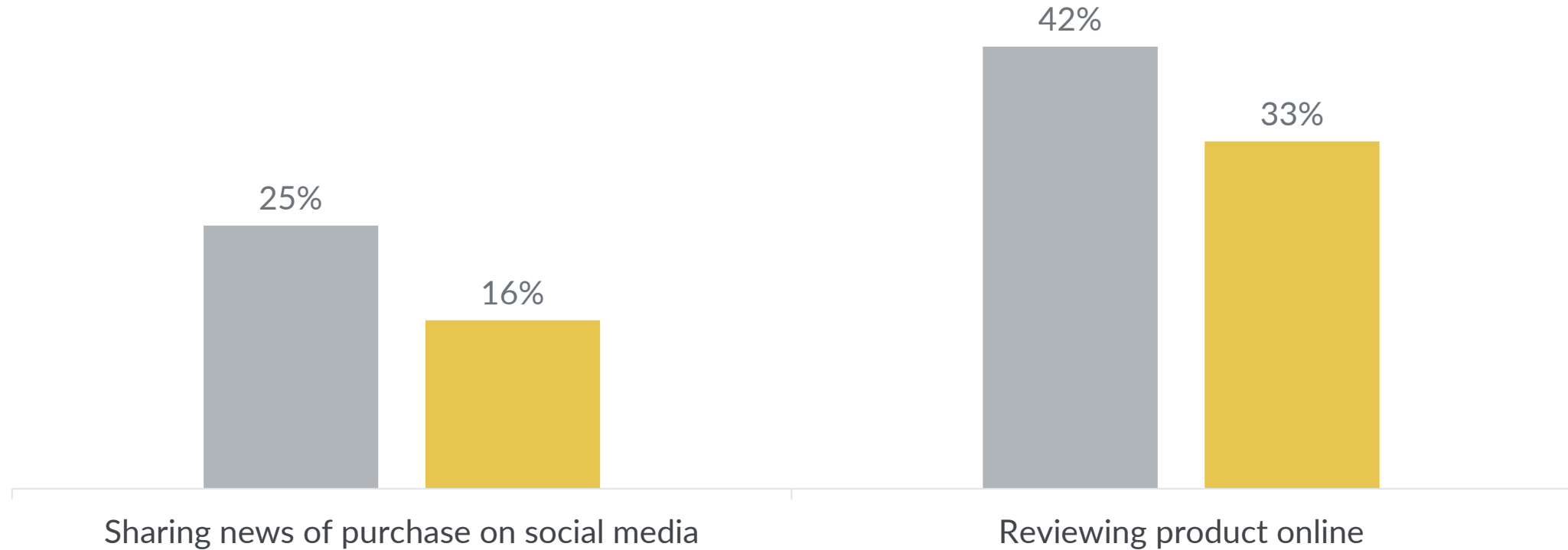
Shopping influences and next big thing

Aun espacio para crecer



% Engaging in post activity

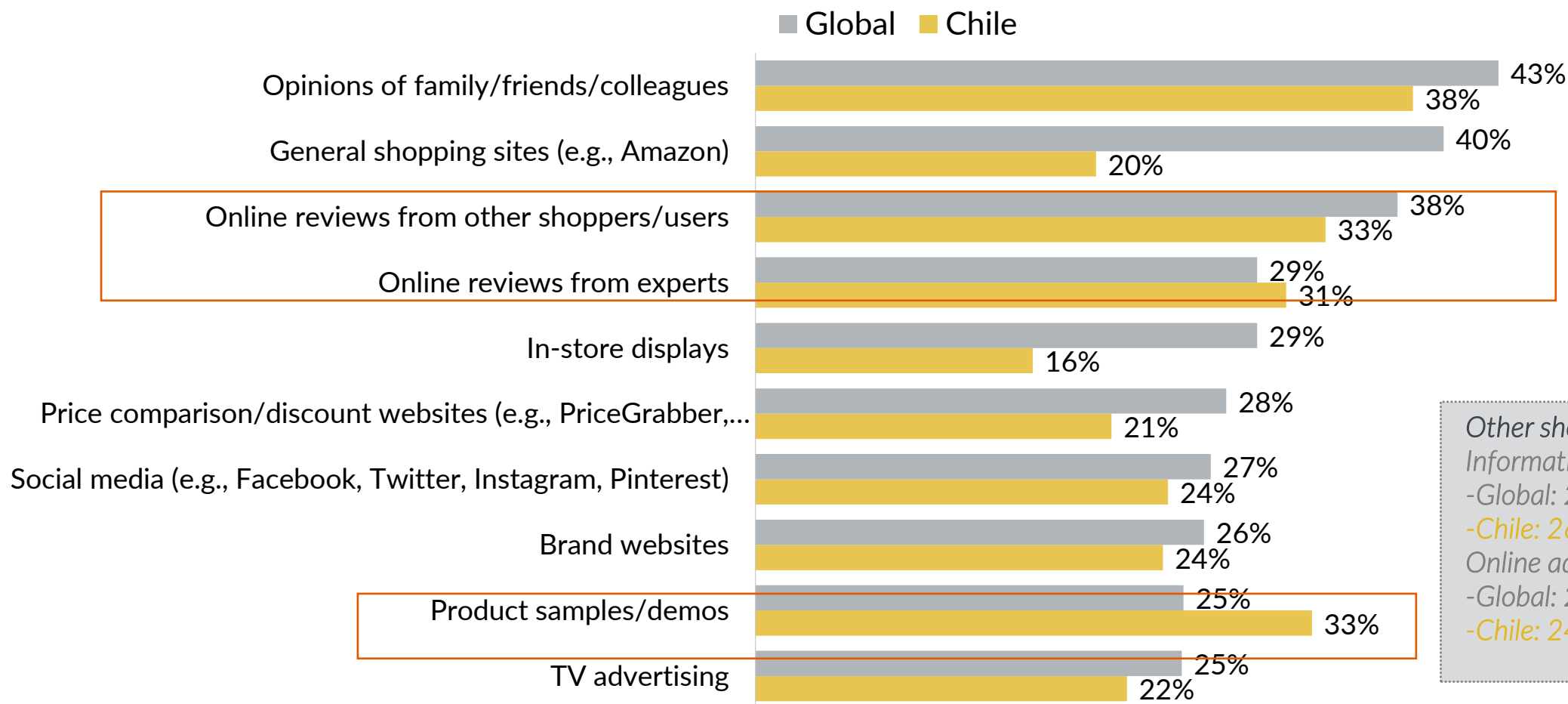
■ Global ■ Chile



Shopping influences



Top 10 shopping influences (all categories)

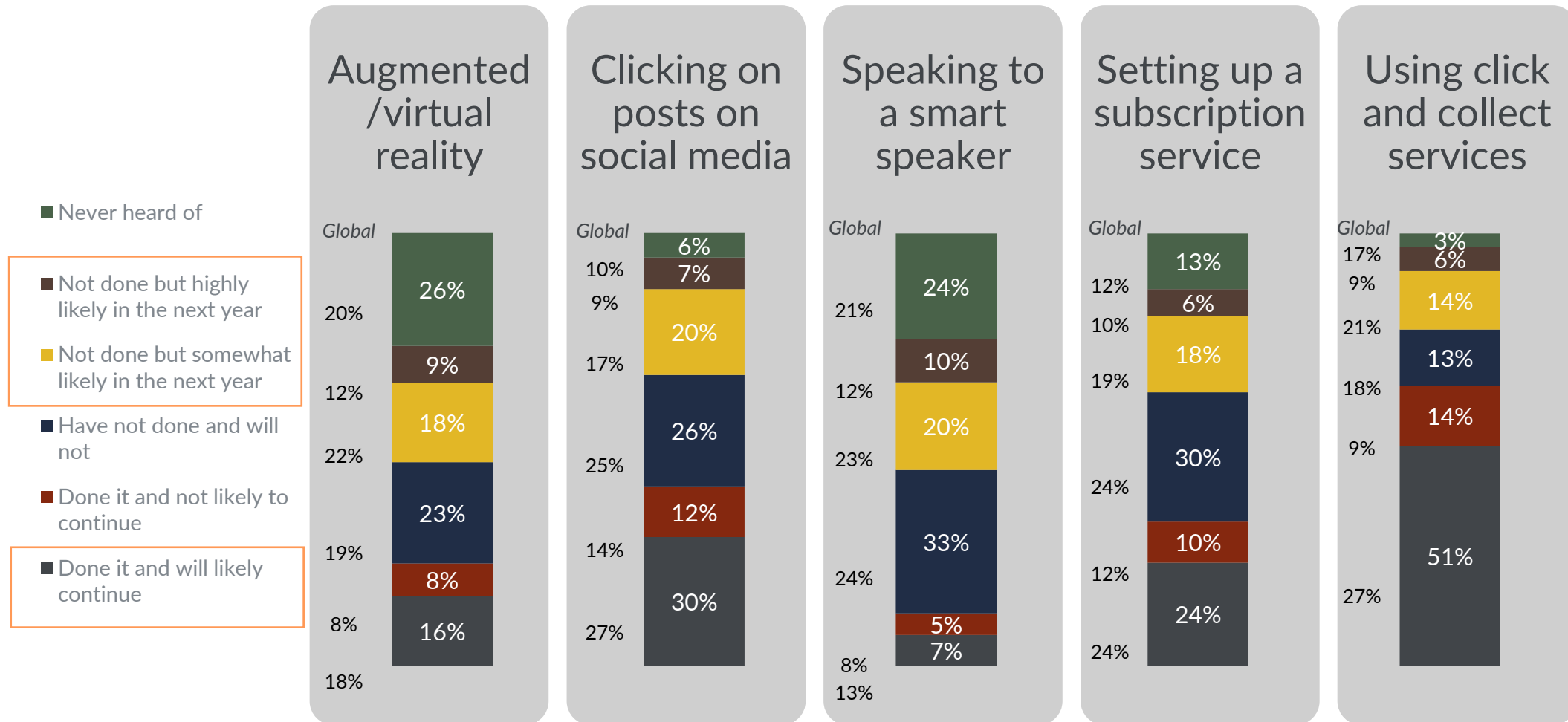


Other shopping influences
Information at shelf
-Global: 24%
-Chile: 26%
Online advertising
-Global: 23%
-Chile: 24%

The future of shopping



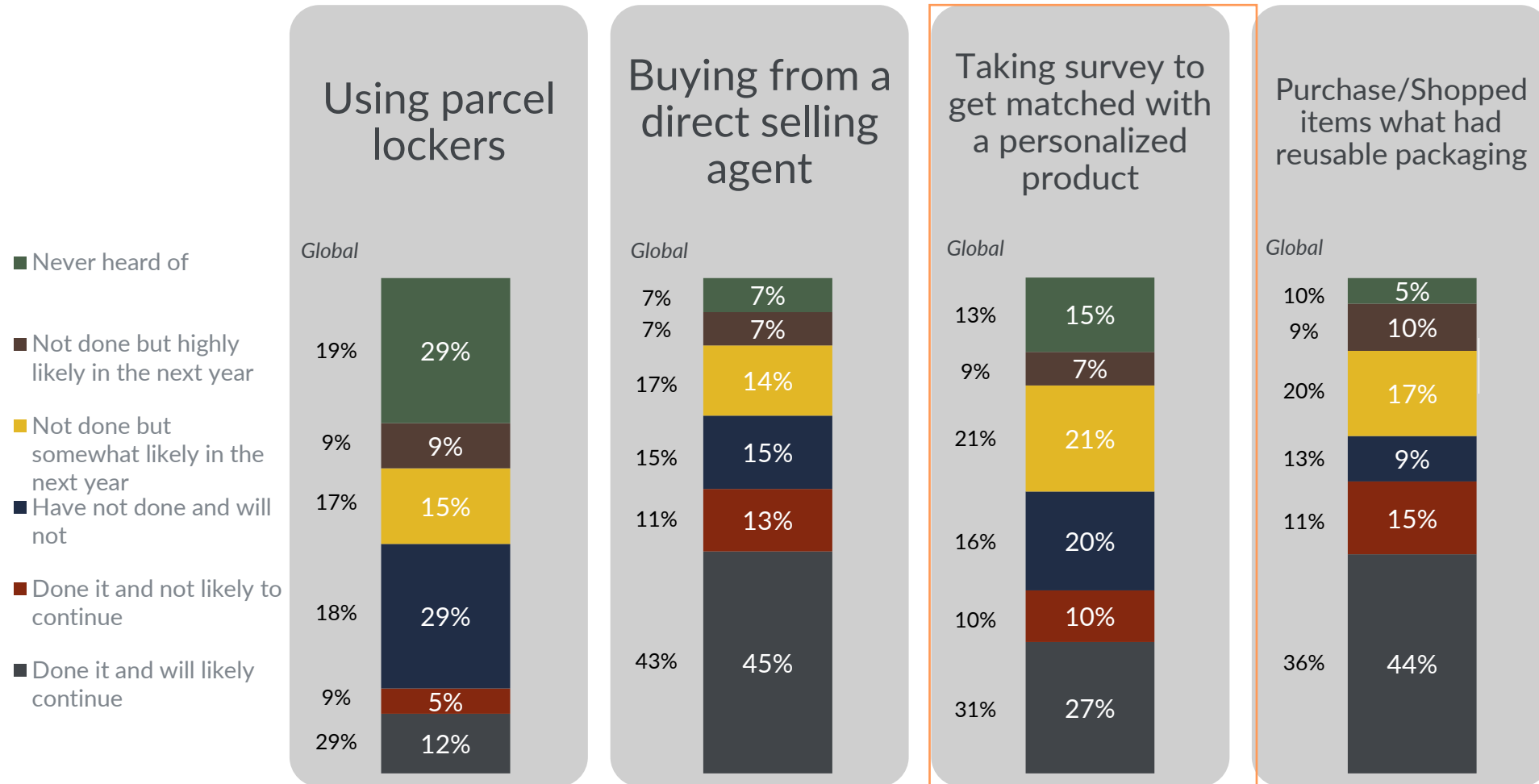
% Trying and continuing (% mention)



The future of shopping



% Trying and continuing (% mention)



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Attitudes | Appeal of future technology



The following may or may not become part of everyday life in the next 20 years. Which of these do you find appealing?
(ranked by global)

	%	Δ from global	Rank	Δ from global	
Language-translation software built into glasses or earbuds/headphones that enables you to converse with someone who speaks a different language	70%	+9 pts	#1	0 ranks	
Robots that fully automate household chores such as cleaning or laundry	51	-9	4	-2	
100% self-driving or autonomous vehicles	48	-8	5	-2	
AI/computerized doctors that can diagnose and address health issues 24/7 using remote digital devices	59	+3	2	+2	
An I.D. card that holds your complete medical history and health information	57	+6	3	+2	
Personalized digital assistants that can talk to you and respond to your needs and emotions	40	-10	9	-3	
A computerized kitchen that will mix, prepare, and cook meals for you	42	-4	8	-1	
Robotic body parts that have superior strength and performance	46	+6	6	+2	
Flying vehicles	32	-5	11	-2	
Space tourism	43	+11	7	+3	
Jetpacks or other devices that enable you to fly	33	+2	10	+1	
NONE OF THESE	1	0	12	0	

La pandemia nos llevó a explorar territorios que se veían muy lejanos y hoy los consumidores están más dispuestos a probar nuevas alternativas, que les entreguen un beneficio claro y faciliten la vida.

Hoy más que nunca es momento de arriesgarse e innovar.

... Y si entiendes te adelantas



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Muchas Gracias

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GfK 2022

