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2017

# Resultados Generales ICC
# Primer Semestre

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# Metodología

# METODOLOGÍA
## Población Objetivo

HOMBRES Y MUJERES MAYORES DE 18 AÑOS

50% DE LA MUESTRA TELÉFONOS FIJOS Y 50% CELULARES

ENCUESTAS EN TODAS LAS COMUNAS CON MÁS DE 130.000 HABITANTES O CAPITALES REGIONALES

CUESTIONARIO ESTRUCTURADO

TOMA DE MUESTRA DIARIA ENTRE MARZO Y JUNIO DE 2017

# METODOLOGÍA
## Ficha metodológica y cuestior

### Muestra Sectorial

Los resultados sectoriales contienen las respuestas recogidas durante **Marzo y Julio de 2017**

**150** Encuestas promedio por Marcas en este estudio

**20.000** Encuestas Totales

FILTROS

**Preguntas sobre un Sector en particular:**

**P1. ¿Posee Ud. una cuenta corriente en algún banco?**

**P2. ¿En cuál?** (ESPONTANEO)

**P3.** SOLO SI POSEE MÁS DE UNA CUENTA CORRIENTE **¿Cuál es su banco principal?**

**P4 ¿ Desde hace cuanto tiempo Ud. es cliente de este banco?**

# METODOLOGÍA

## Cuestionario (generalizado por marca)

VARIABLES MEDIDAS

**1. CONFIANZA**

**En general ¿puede confiar en la marca?**

En una escala de 1 a 7, donde 1 es 'Muy Insatisfecho' y 7 es 'Muy Satisfecho'.

**2. TRANSPARENCIA**

**¿La marca es transparente? (no hay letra chica, no me esconde nada).**

Utilice la misma escala de 1 a 7.

**3. PREOCUPACION**

**¿La marca se preocupa por el bienestar?**

Utilice la misma escala de 1 a 7.

**4. CUMPLIMIENTO**

**¿La marca cumple lo que promete?**

Utilice la misma escala de 1 a 7.

# METODOLOGÍA
## INDICE CES DE CREDIBILIDAD DE LOS CLIENTES

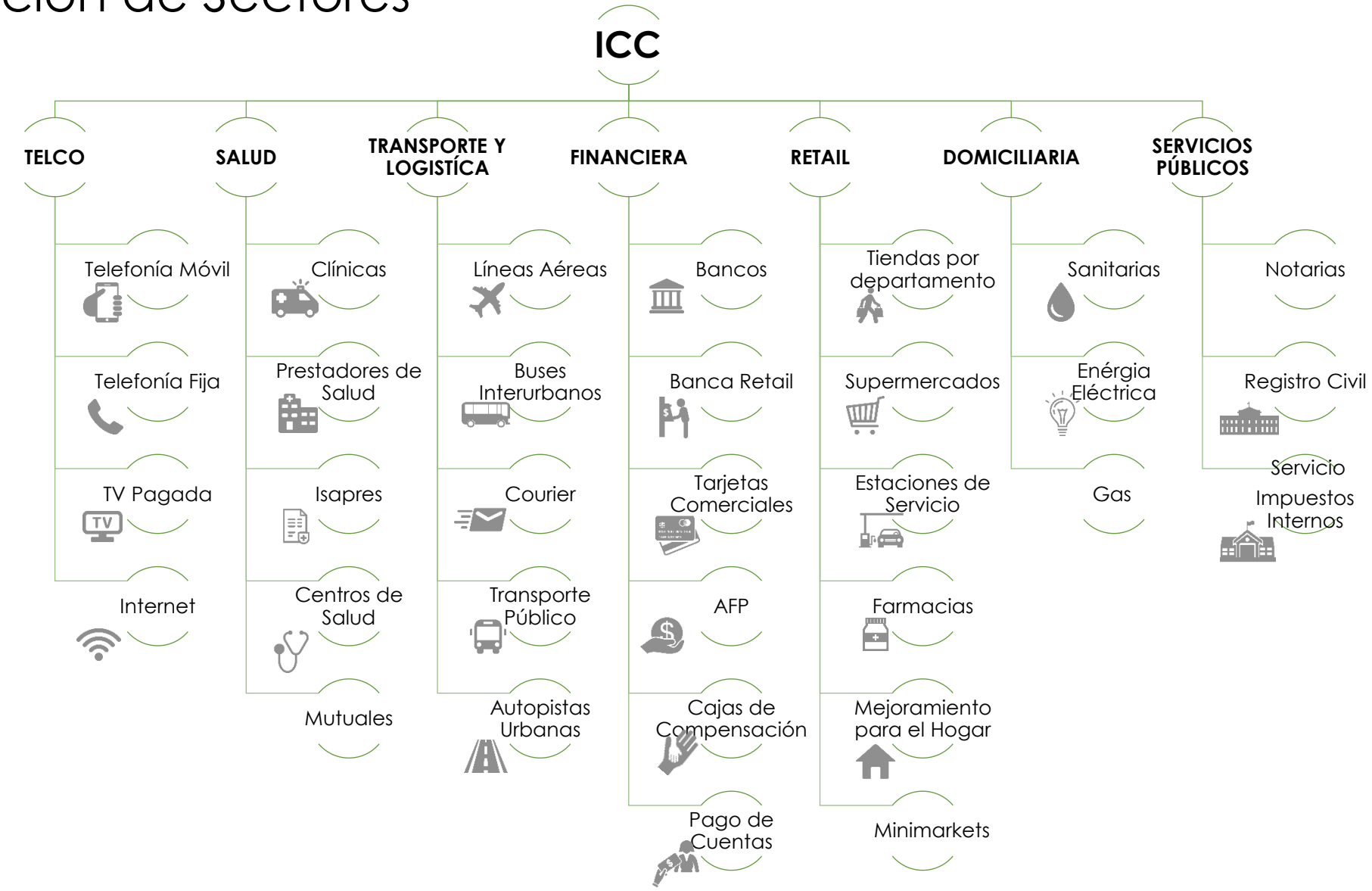
INDICE DE CREDIBILIDAD =

- CONFIANZA + TRANSPARENCIA +
- PREOCUPACIÓN + CUMPLIMIENTO

El índice es generado a través de un factor mediante métodos estadísticos (factor scores).

# METODOLOGÍA

## Agrupación de Sectores



# METODOLOGÍA

## Marcas medidas durante el 2017

| Sector | Marca |
|---|---|
| AFP | Cuprum AFP, ProVida AFP, AFP Capital, afp modelo, HABITAT, PlanVital |
| Autopistas Urbanas | central, vespucio norte, VESPUCIO SUR, COSTANERA NORTE |
| Banca Retail | BancoCrediChile, BciNova, BANCO RIPLEY, Coopeuch, Banefe |
| Bancos | Banco de Chile, BancoFalabella, Santander, BANCO security, CORPBANCA, Bci, BANCO BICE, BancoEstado, Itaú, Scotiabank, BBVA, BANCO EDWARDS, citi |
| Buses Interurbanos | Pullman Bus, turbus |
| Cajas de Compensación | Caja 18, La Araucana, Los Andes, LOS HEROES |
| Centros Médicos | megaSALUD, VIDA INTEGRA, IntegraMédica |
| Clínicas | Alemana, CLC, Clínica Santa María, CLINICA DAVILA, Red de Salud UC · CHRISTUS, INDISA |
| Courier | chilexpress, CORREOS CHILE |
| Energía Eléctrica | CGE, CHILQUINTA, chilectra, grupo saesa |
| Estaciones de Servicio | PETROBRAS, COPEC |
| Farmacias | sb, Cruz Verde, ahumada |
| Gas | GASCO, abastible, Lipigas, METROGAS |
| Internet | vtr, Claro, movistar |
| Isapre Fonasa | Colmena, CruzBlanca, Banmédica, Fonasa, CONSALUD, masvida |
| Líneas Aéreas | LATAM, SKY Airline |
| Mejoramiento Para el Hogar | easy, HOMECENTER SODIMAC |
| Minimarkets | OK MARKET, BIG John, upa!, PRONTO, Spacio 1 |
| Mutuales | ist, MUTUAL, ACHS |
| Pago de Cuentas | sencillito, SERVIPAG |
| Sanitarias | Essbio, AGUAS andinas, esval, aguas antofagasta, Nuevosur, AGUASdelvalle, Araucanía, essal, Aguas Magallanes, Aguas del Altiplano, aguaspatagonia, Aguas Chañar |
| Prestadores de Salud | Hospitales Públicos, SAMU, Consultorios Municipales |
| Servicios Públicos | Sii, Notarías, Registro Civil e Identificación |
| Supermercados | unimarc, Santa Isabel, Jumbo, Lider, TOTTUS |
| Tarjetas Comerciales | CMR Falabella, CONCESUD, RIPLEY, bland |
| Telefonía Fija | vtr, Claro, movistar |
| Telefonía Móvil | entel, Claro, movistar |
| Televisión Pagada | DIRECTV, Claro, vtr, movistar |
| Tiendas por Departamento | falabella, RIPLEY, paris, laPolar |
| Transporte Público | METRO DE SANTIAGO, Micros Regionales, transantiago |

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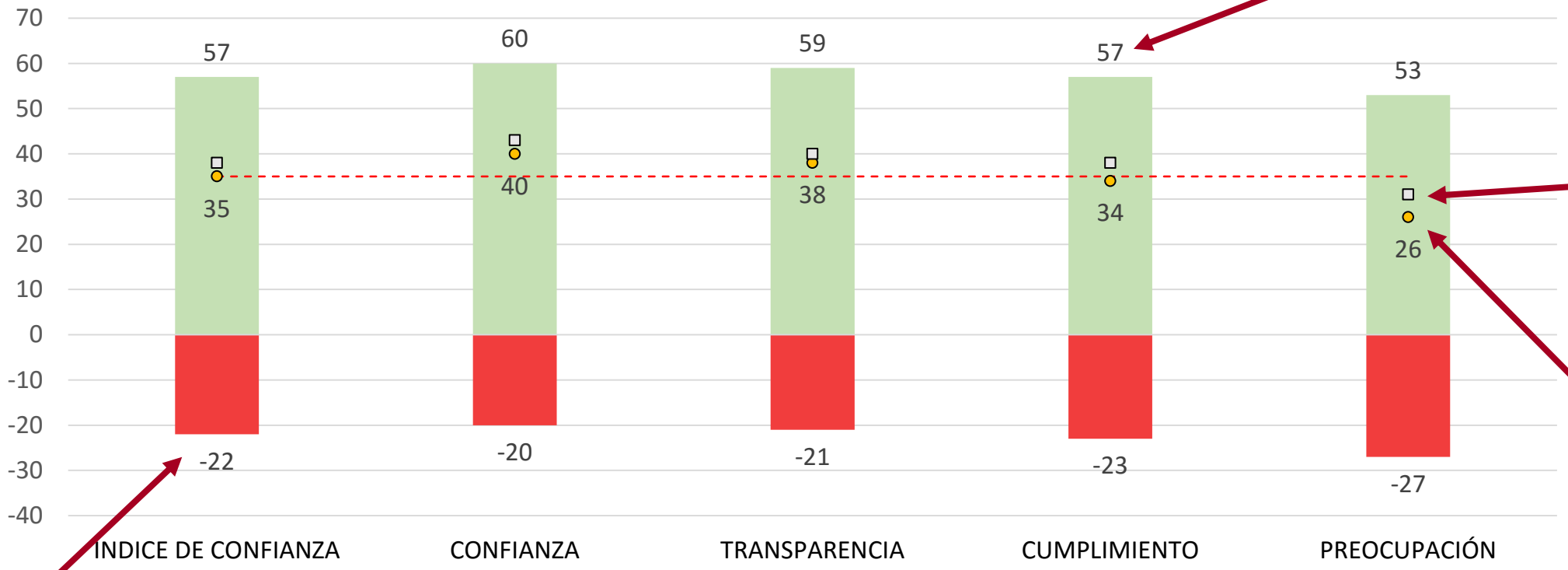
# Resultados Generales

# REPRESENTACIÓN GRÁFICA DE LAS VARIABLES

## Índice de Confianza y variables asociadas
## Primer semestre 2017

***Evaluación positiva:***
***% de encuestados que califican con nota 6 y 7 la situación o aspecto de servicio***

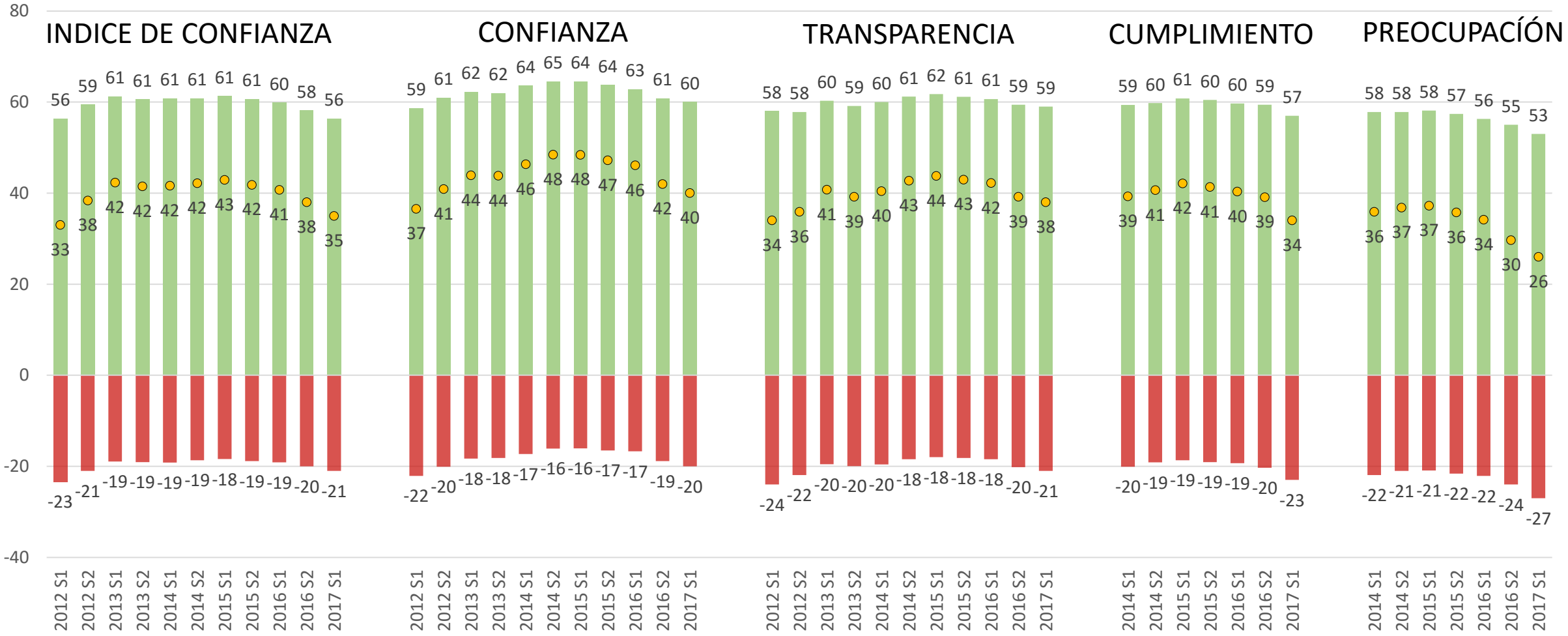



***Índice Neto***
***2do semestre 2016***

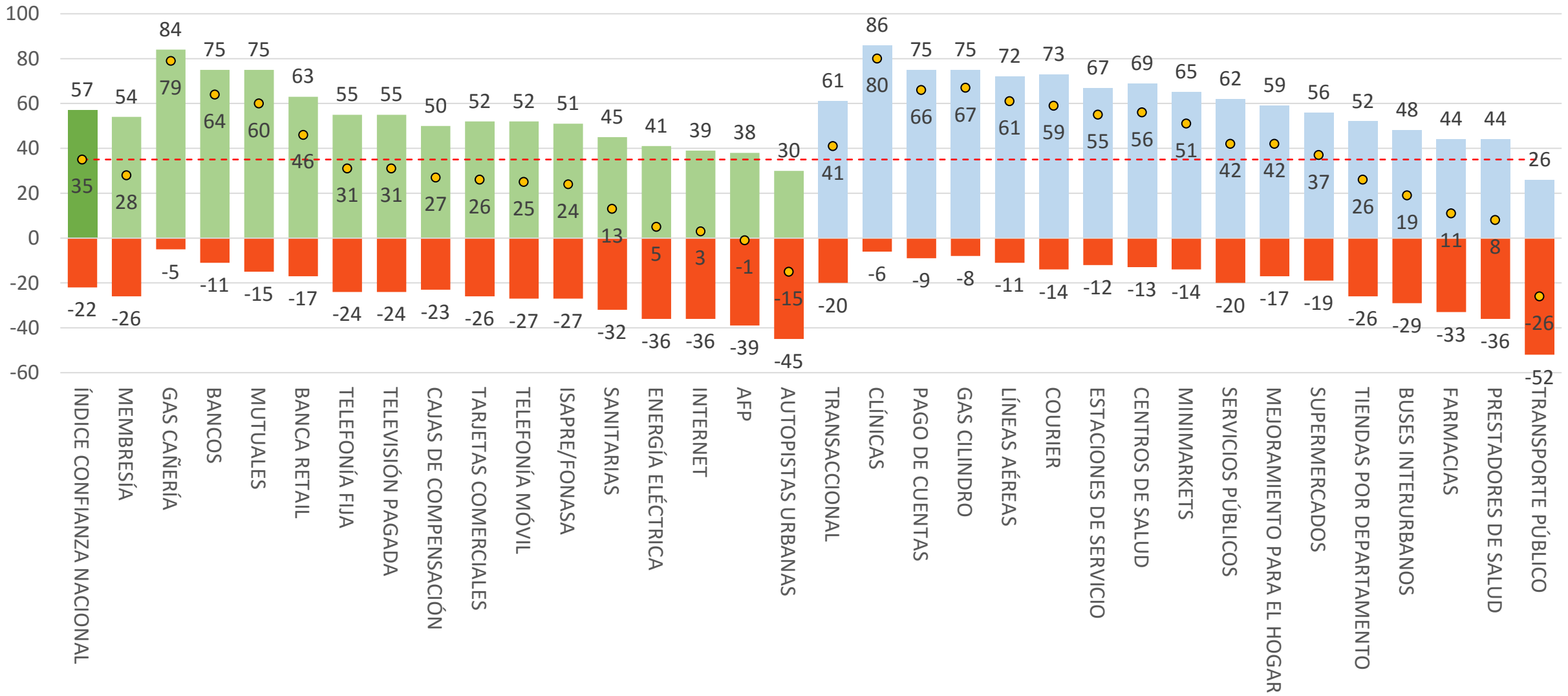
***Índice Neto:***
***% de encuestados que califican con notas 6 y 7 menos % que califican con notas 1 a 4***

***Evaluación negativa:***
***% de encuestados que califican con nota 4 ó menos la situación o aspecto de servicio***

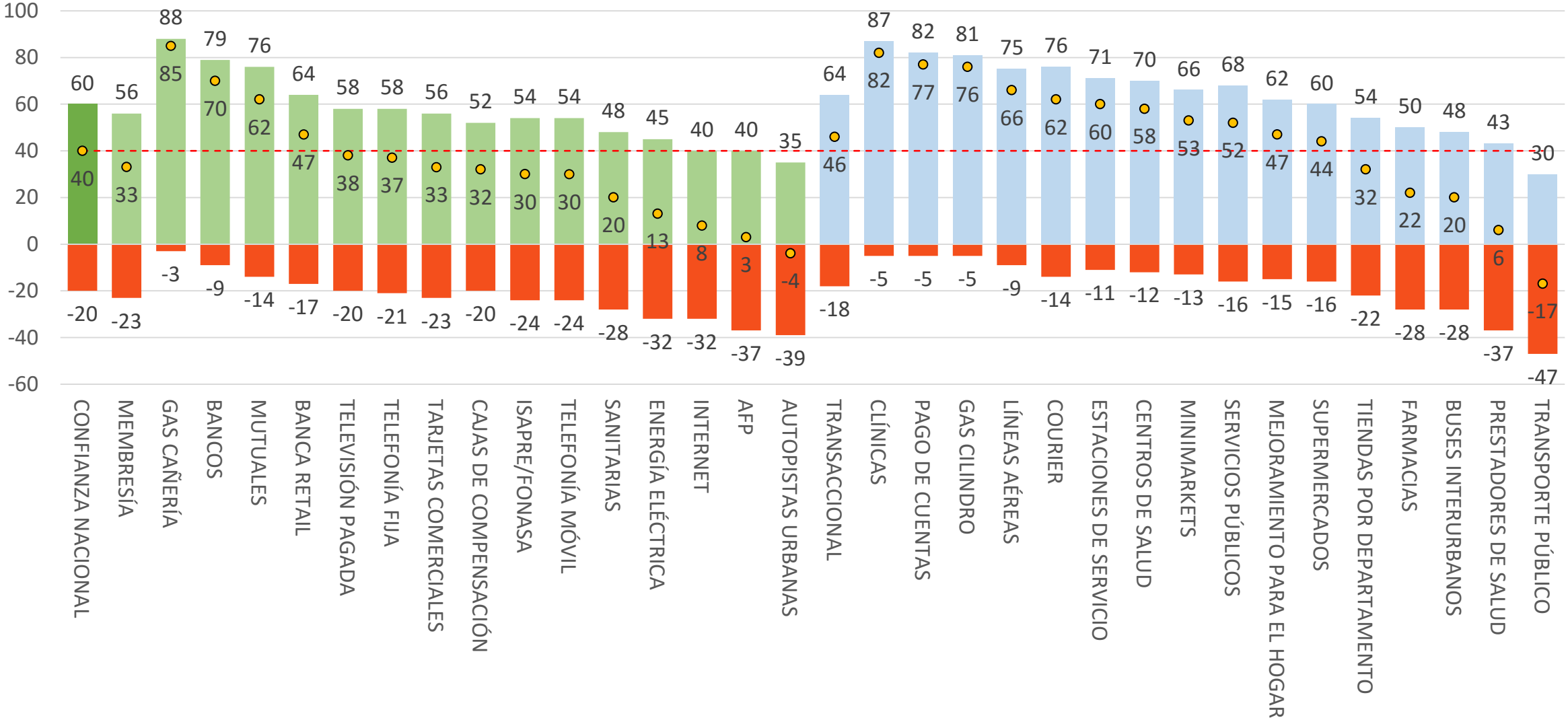
# EVOLUTIVO SEMESTRAL



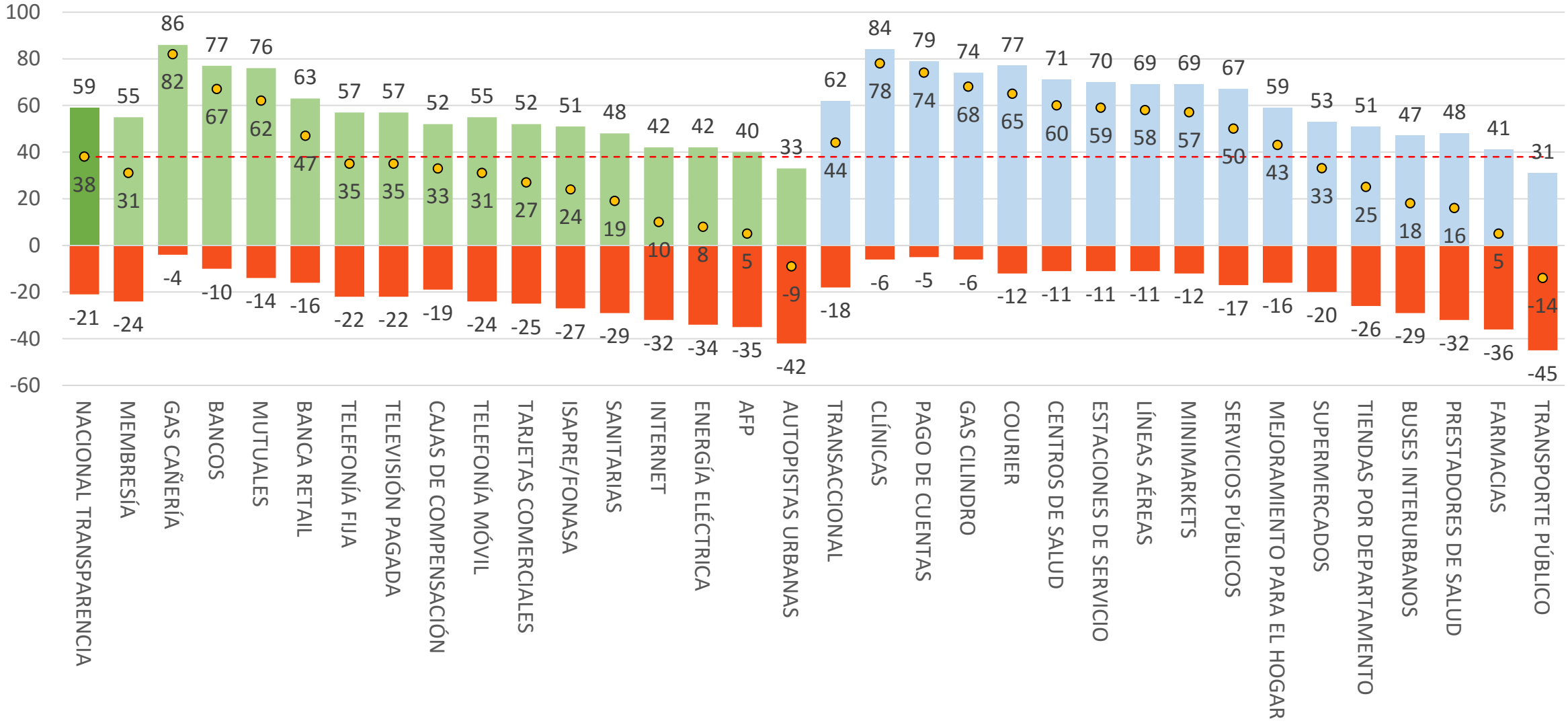
# RESULTADOS SECTORIALES: IND. DE CONFIANZA
## Primer semestre 2017



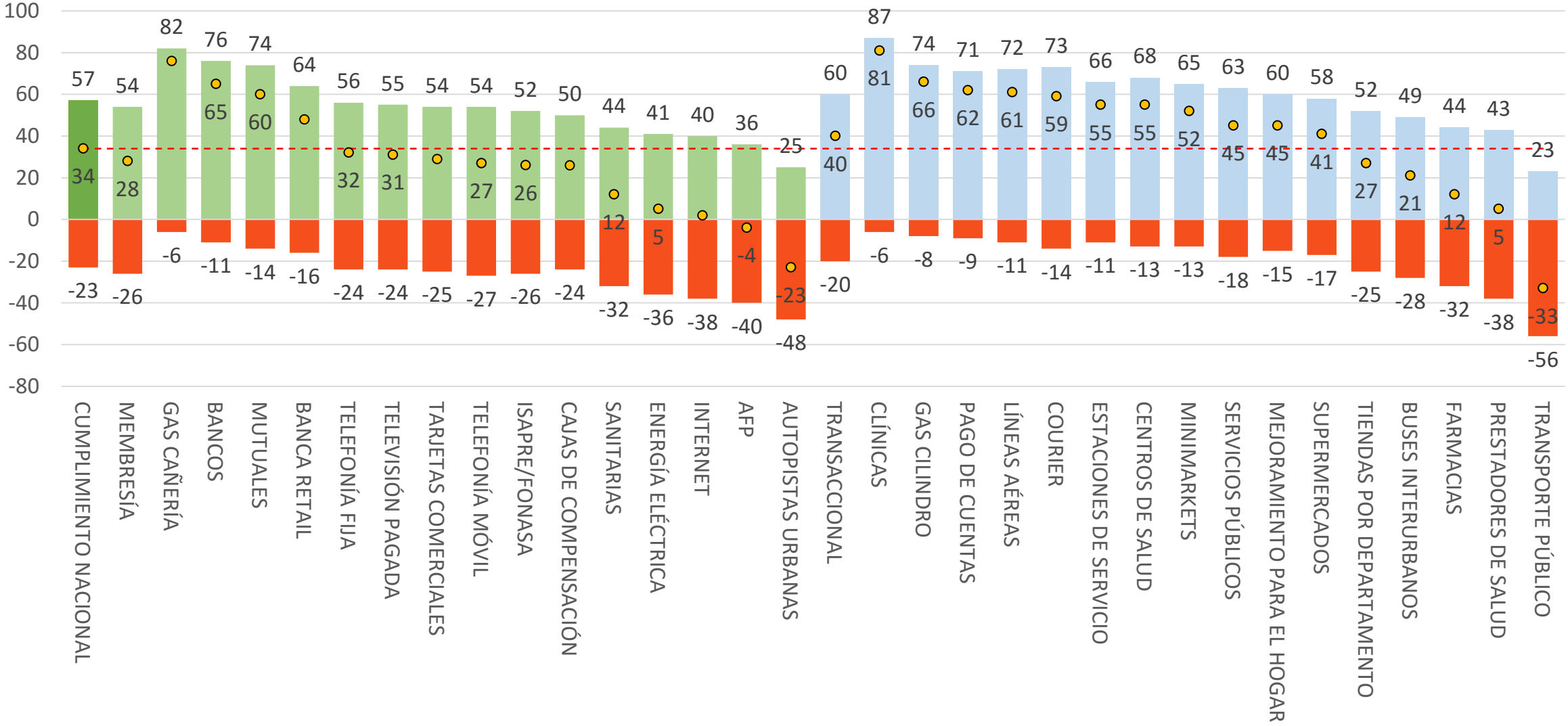
# RESULTADOS SECTORIALES: CONFIANZA
## Primer semestre 2017



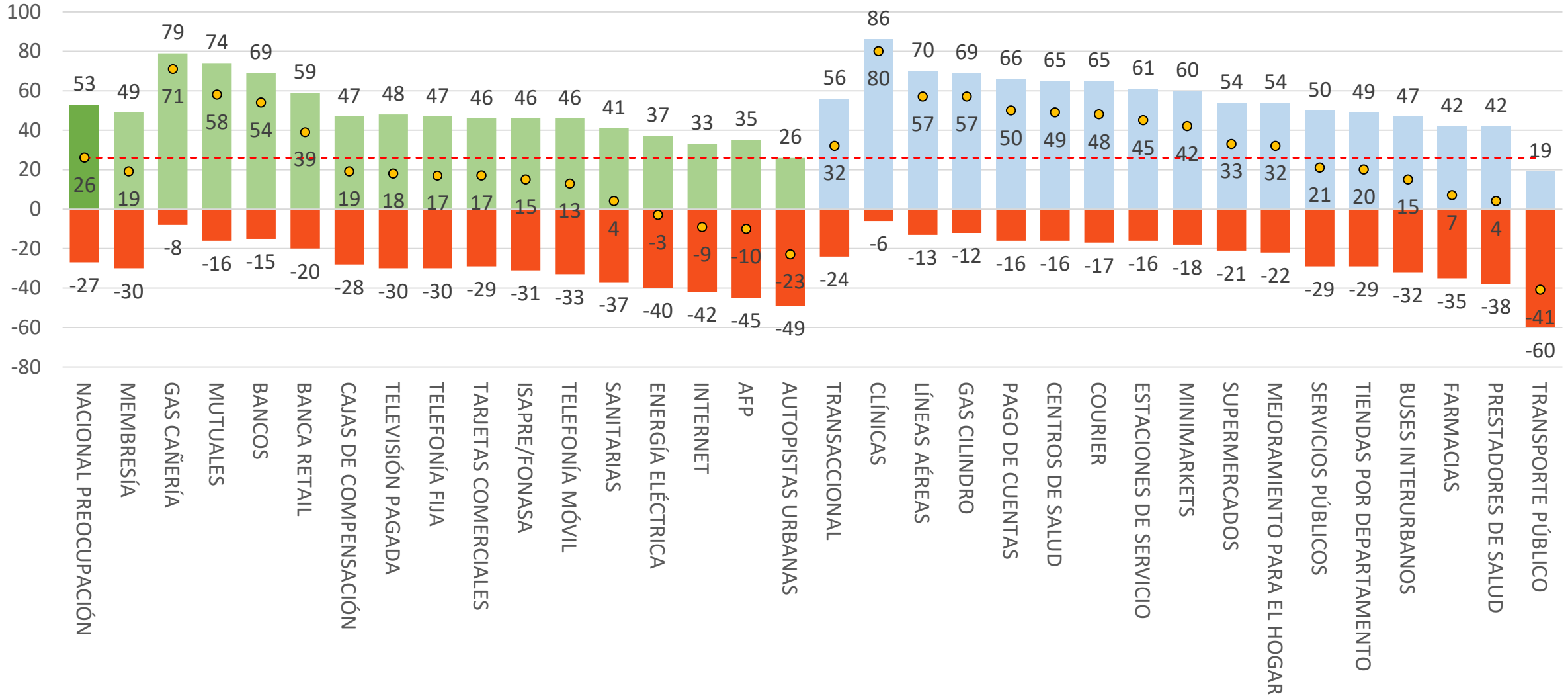
# RESULTADOS SECTORIALES: TRANSPARENCIA
## Primer semestre 2017



# RESULTADOS SECTORIALES: CUMPLIMIENTO
## Primer semestre 2017

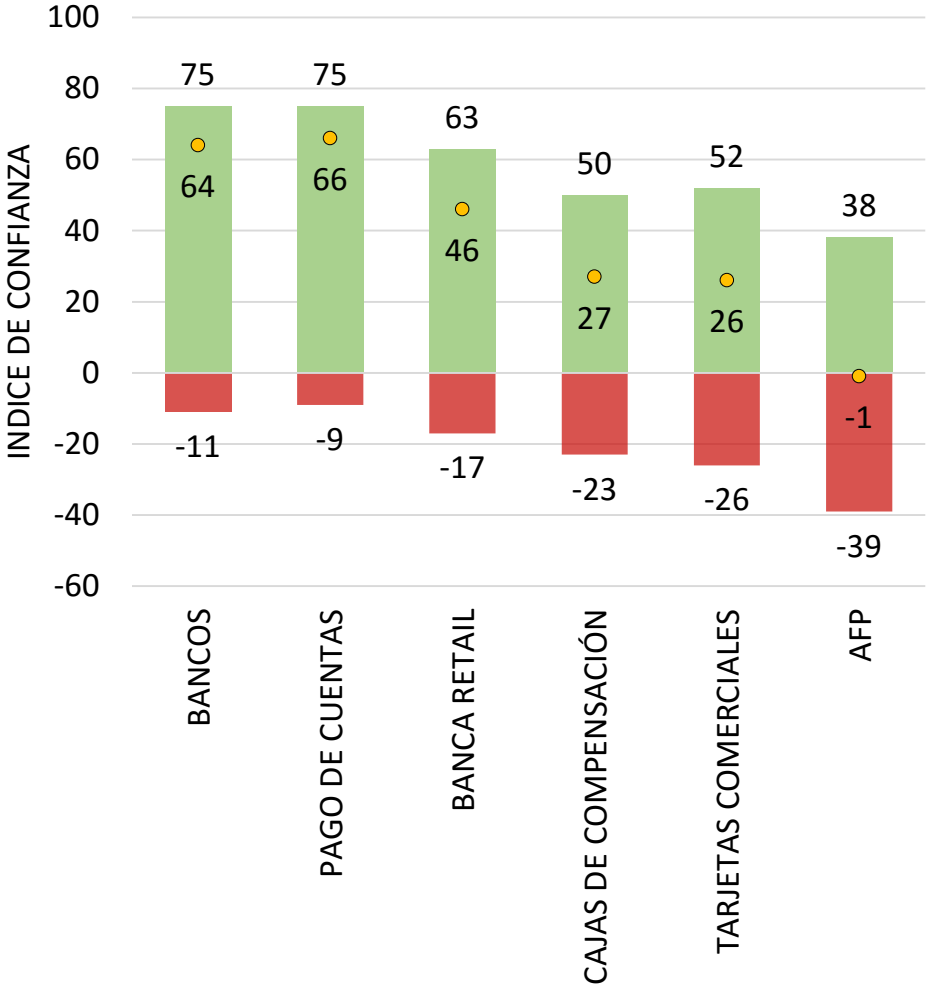


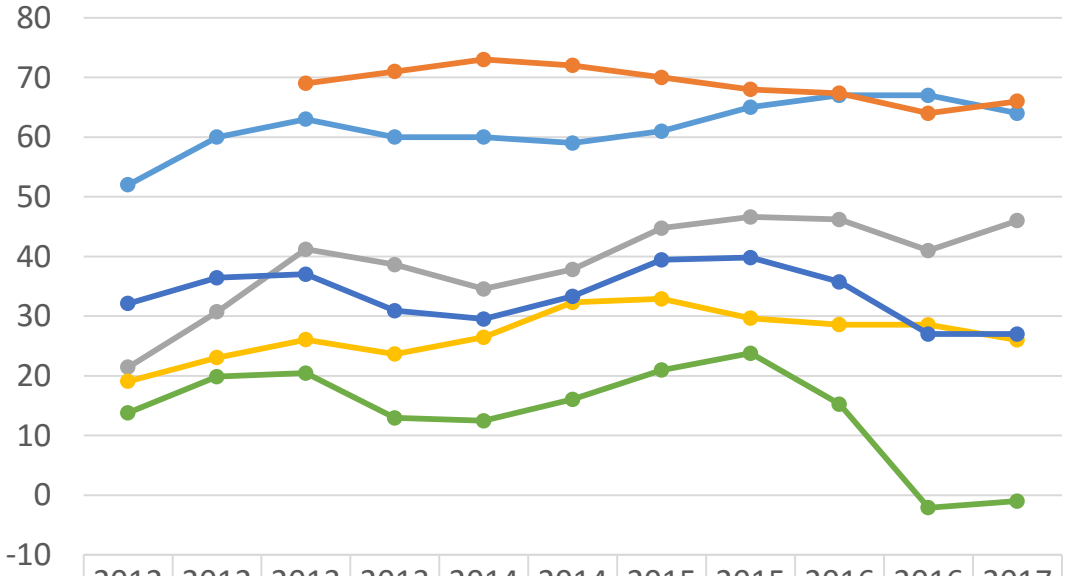
# RESULTADOS SECTORIALES: PREOCUPACIÓN
## Primer semestre 2017



# Resultados en la Industria Financiera

# **Evolutivo sectorial** en las Financieras

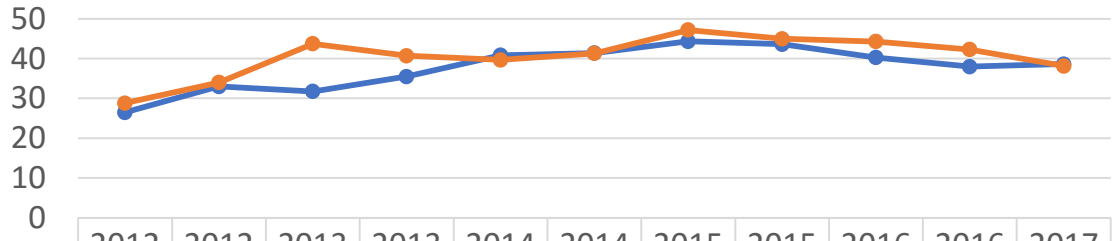



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| BANCOS | 52 | 60 | 63 | 60 | 60 | 59 | 61 | 65 | 67 | 67 | 64 |
| PAGO DE CUENTAS | | | 69 | 71 | 73 | 72 | 70 | 68 | 67 | 64 | 66 |
| BANCA RETAIL | 21 | 31 | 41 | 39 | 35 | 38 | 45 | 47 | 46 | 41 | 46 |
| TARJETAS COMERCIALES | 19 | 23 | 26 | 24 | 26 | 32 | 33 | 30 | 29 | 29 | 26 |
| CAJAS DE COMPENSACIÓN | 32 | 36 | 37 | 31 | 30 | 33 | 39 | 40 | 36 | 27 | 27 |
| AFP | 14 | 20 | 20 | 13 | 12 | 16 | 21 | 24 | 15 | -2 | -1 |

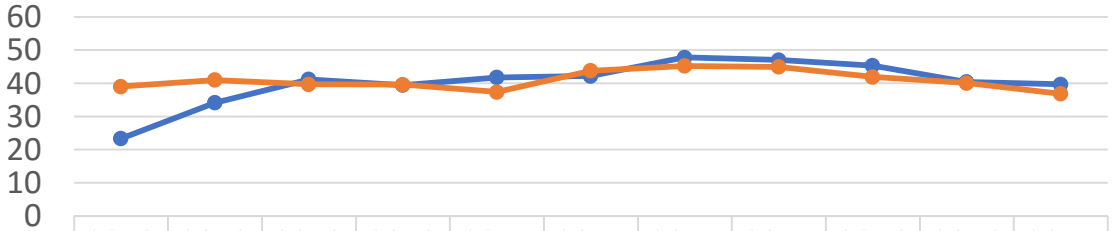
# **Evolutivos socio-demográficos** en las Financieras

SEXO FINANCIERAS



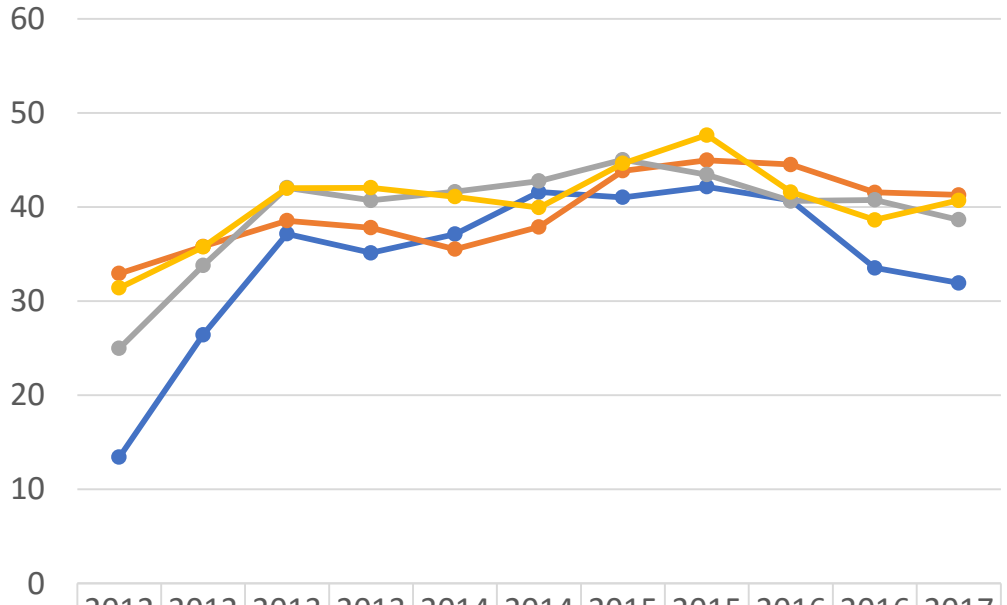

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| HOMBRE | 26 | 33 | 32 | 35 | 41 | 41 | 44 | 44 | 40 | 38 | 39 |
| MUJER | 29 | 34 | 44 | 41 | 40 | 41 | 47 | 45 | 44 | 42 | 38 |

ZONA FINANCIERAS



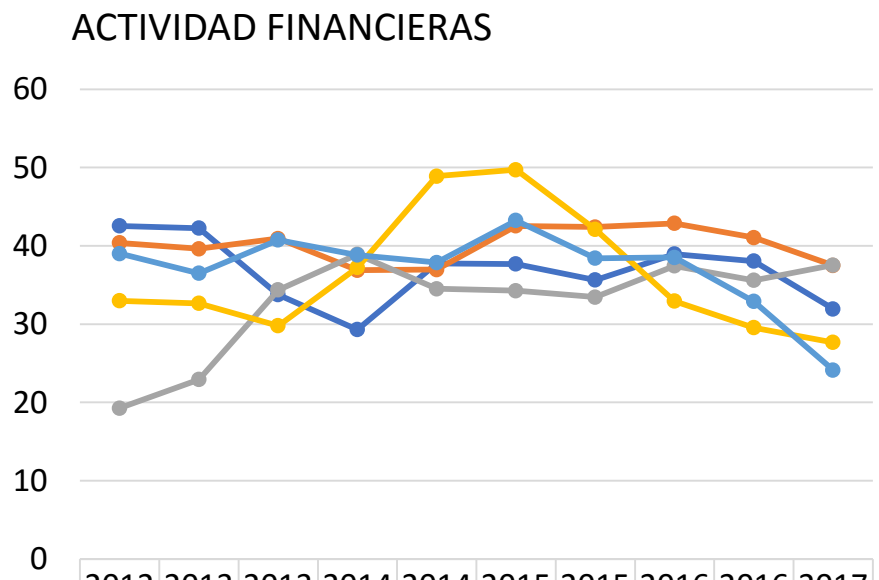

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| R.M. | 23 | 34 | 41 | 39 | 42 | 42 | 48 | 47 | 45 | 40 | 40 |
| Regiones | 39 | 41 | 40 | 40 | 37 | 44 | 45 | 45 | 42 | 40 | 37 |

Edad Financieras

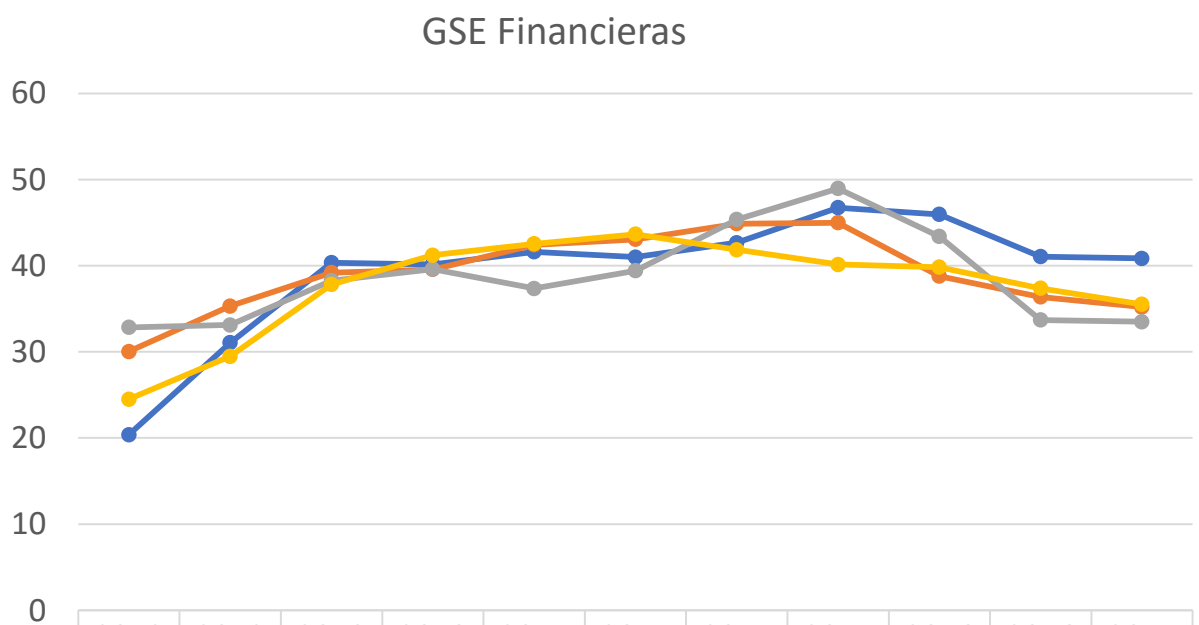



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Menor que 30 | 13 | 26 | 37 | 35 | 37 | 42 | 41 | 42 | 41 | 34 | 32 |
| 30 - 44 | 33 | 36 | 39 | 38 | 36 | 38 | 44 | 45 | 45 | 42 | 41 |
| 45 - 59 | 25 | 34 | 42 | 41 | 42 | 43 | 45 | 43 | 41 | 41 | 39 |
| 60 o más | 31 | 36 | 42 | 42 | 41 | 40 | 45 | 48 | 42 | 39 | 41 |

# **Evolutivos socio-demográficos** en las Financieras




| | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|
| Dueña de casa | 43 | 42 | 34 | 29 | 38 | 38 | 36 | 39 | 38 | 32 |
| Trabaja fuera de casa | 40 | 40 | 41 | 37 | 37 | 43 | 42 | 43 | 41 | 37 |
| Estudiante | 19 | 23 | 34 | 39 | 35 | 34 | 33 | 37 | 36 | 38 |
| Busca trabajo | 33 | 33 | 30 | 37 | 49 | 50 | 42 | 33 | 30 | 28 |
| Jubilado | 39 | 36 | 41 | 39 | 38 | 43 | 38 | 39 | 33 | 24 |




| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ABC1 | 20 | 31 | 40 | 40 | 42 | 41 | 43 | 47 | 46 | 41 | 41 |
| C2 | 30 | 35 | 39 | 40 | 42 | 43 | 45 | 45 | 39 | 36 | 35 |
| C3 | 33 | 33 | 38 | 40 | 37 | 39 | 45 | 49 | 43 | 34 | 33 |
| D-E | 25 | 29 | 38 | 41 | 43 | 44 | 42 | 40 | 40 | 37 | 36 |

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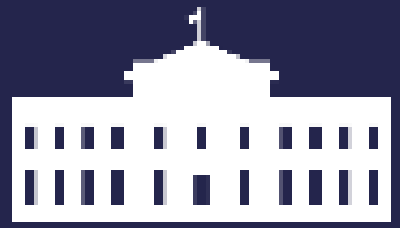
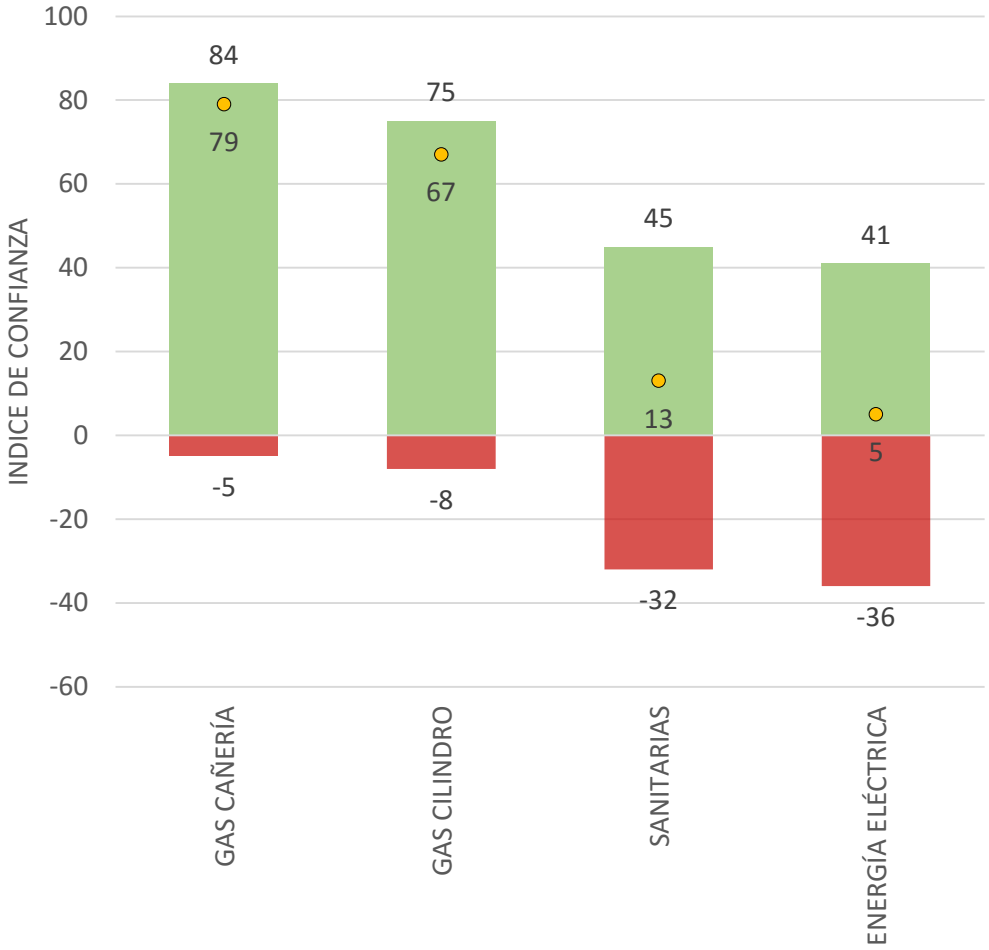
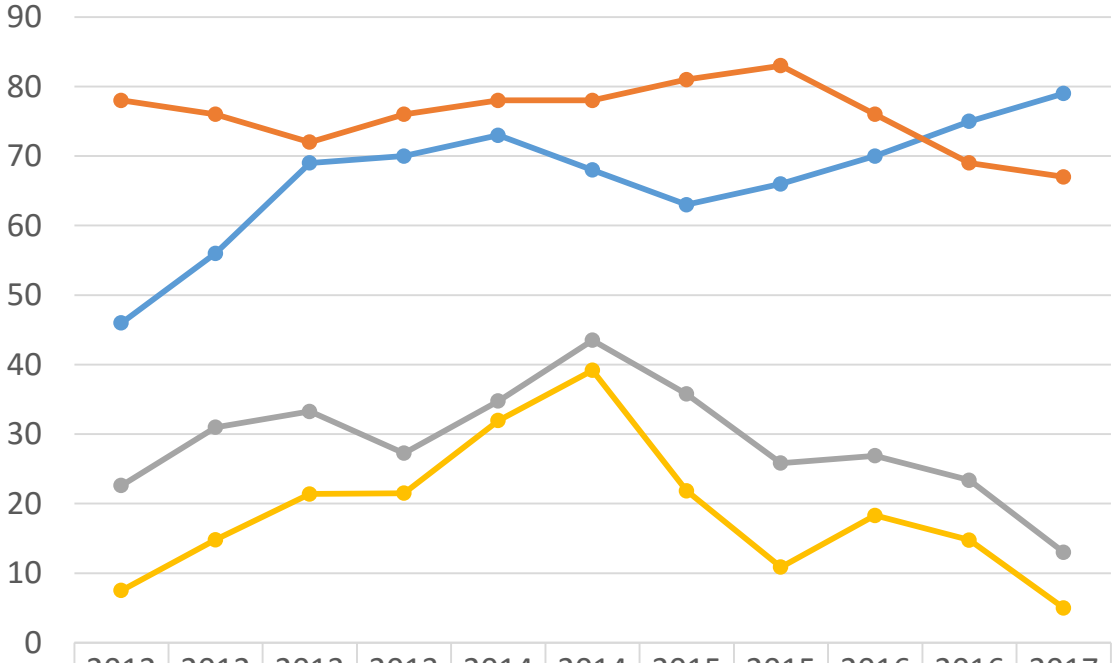
# Resultados en la Industria Domiciliaria



# **Evolutivo sectorial** en las Domiciliarias

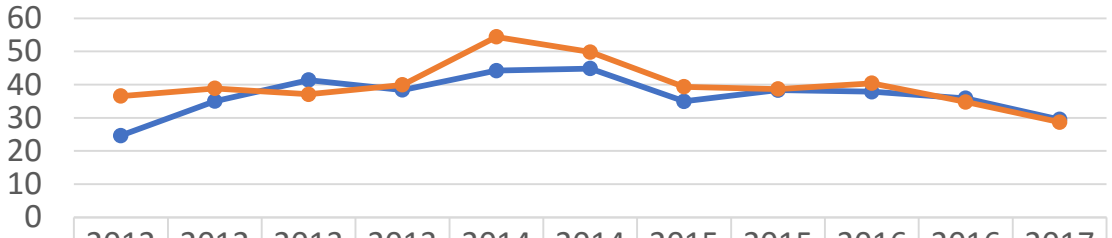



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| GAS CAÑERÍA | 46 | 56 | 69 | 70 | 73 | 68 | 63 | 66 | 70 | 75 | 79 |
| GAS CILINDRO | 78 | 76 | 72 | 76 | 78 | 78 | 81 | 83 | 76 | 69 | 67 |
| SANITARIAS | 23 | 31 | 33 | 27 | 35 | 43 | 36 | 26 | 27 | 23 | 13 |
| ENERGÍA ELÉCTRICA | 8 | 15 | 21 | 22 | 32 | 39 | 22 | 11 | 18 | 15 | 5 |

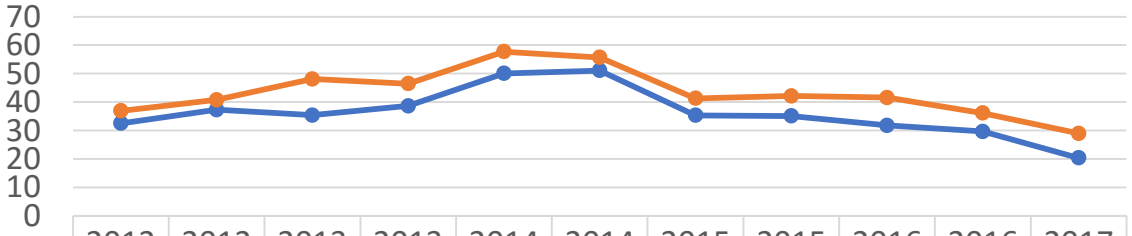
# **Evolutivos socio-demográficos** en las Domiciliarias

SEXO DOMICILIARIAS



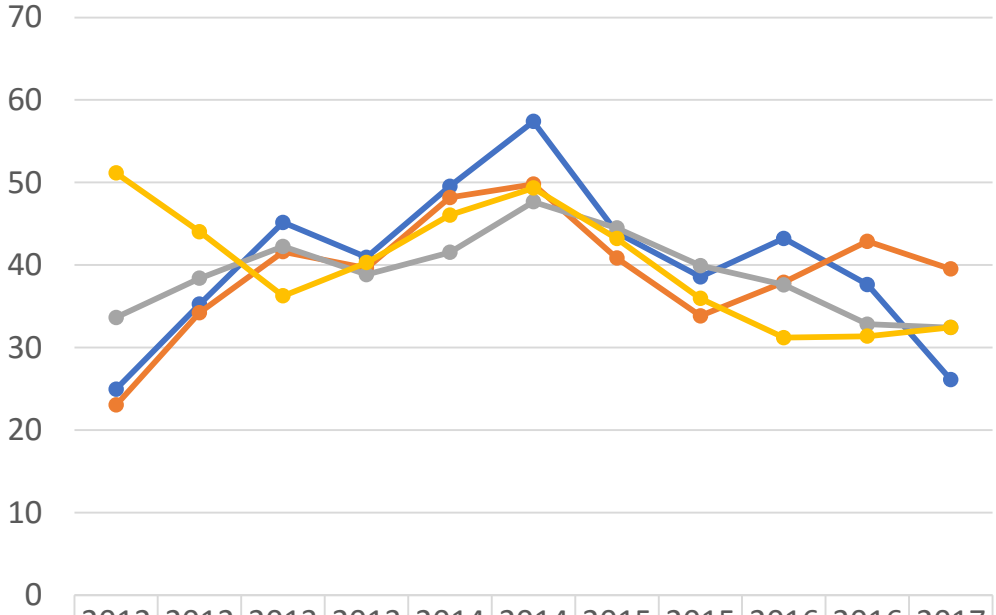

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| HOMBRE | 25 | 35 | 41 | 38 | 44 | 45 | 35 | 38 | 38 | 36 | 29 |
| MUJER | 37 | 39 | 37 | 40 | 54 | 50 | 39 | 39 | 40 | 35 | 29 |

ZONA DOMICILIARIAS




| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| R.M. | 33 | 37 | 35 | 39 | 50 | 51 | 35 | 35 | 32 | 30 | 20 |
| Regiones | 37 | 41 | 48 | 46 | 58 | 56 | 41 | 42 | 42 | 36 | 29 |

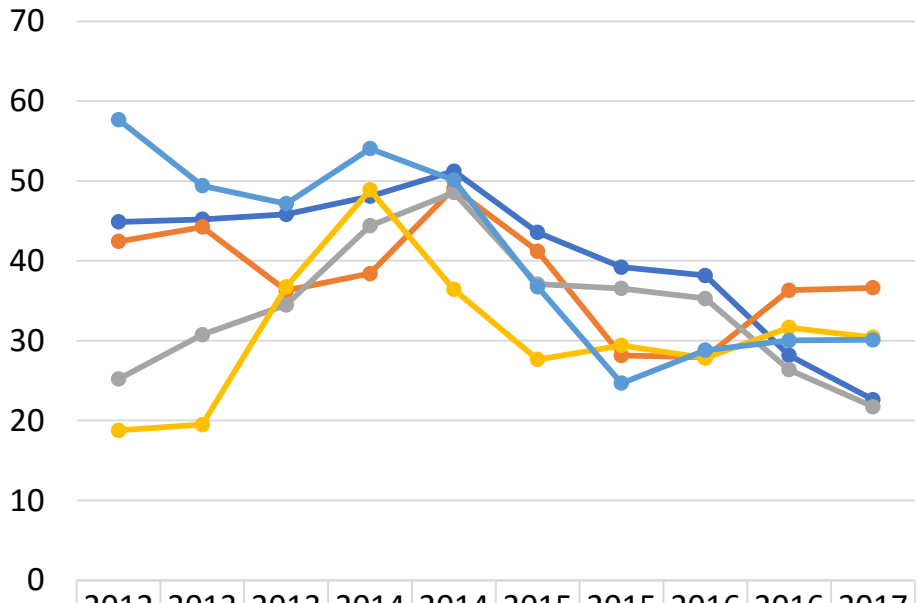
Edad Domiciliarias




| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Menor que 30 | 25 | 35 | 45 | 41 | 50 | 57 | 44 | 39 | 43 | 38 | 26 |
| 30 - 44 | 23 | 34 | 42 | 40 | 48 | 50 | 41 | 34 | 38 | 43 | 40 |
| 45 - 59 | 34 | 38 | 42 | 39 | 42 | 48 | 44 | 40 | 38 | 33 | 32 |
| 60 o más | 51 | 44 | 36 | 40 | 46 | 49 | 43 | 36 | 31 | 31 | 32 |

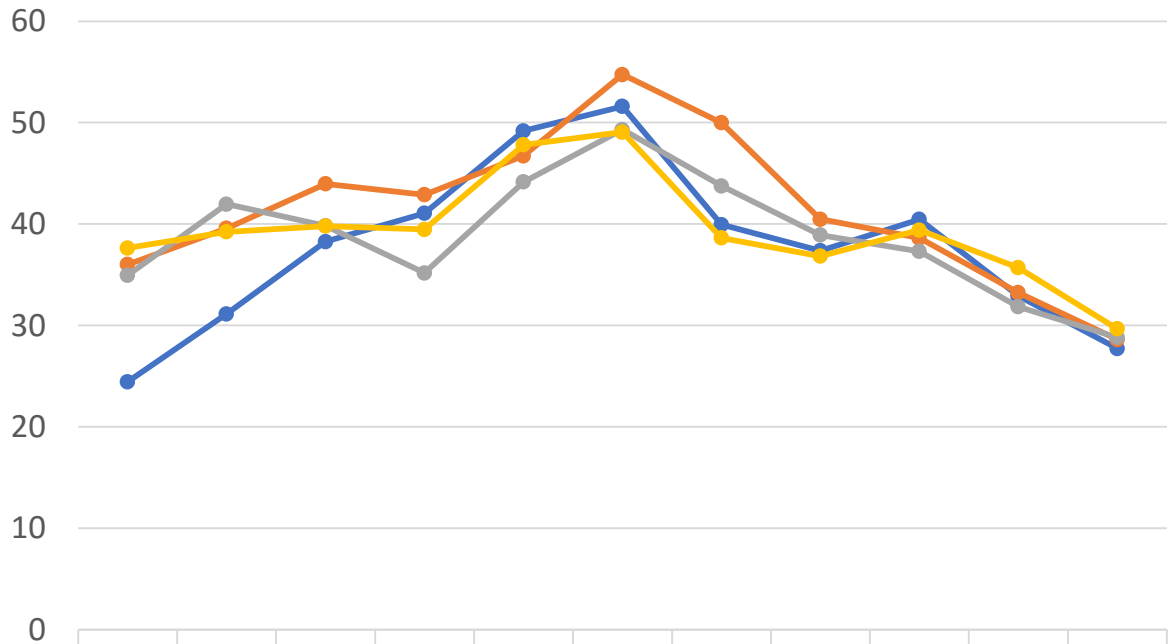
# **Evolutivos socio-demográficos** en las Domiciliarias

ACTIVIDAD DOMICILIARIAS




| | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|
| Dueña de casa | 45 | 45 | 46 | 48 | 51 | 44 | 39 | 38 | 28 | 23 |
| Trabaja fuera de casa | 42 | 44 | 36 | 38 | 49 | 41 | 28 | 28 | 36 | 37 |
| Estudiante | 25 | 31 | 34 | 44 | 49 | 37 | 37 | 35 | 26 | 22 |
| Busca trabajo | 19 | 19 | 37 | 49 | 36 | 28 | 29 | 28 | 32 | 30 |
| Jubilado | 58 | 49 | 47 | 54 | 50 | 37 | 25 | 29 | 30 | 30 |

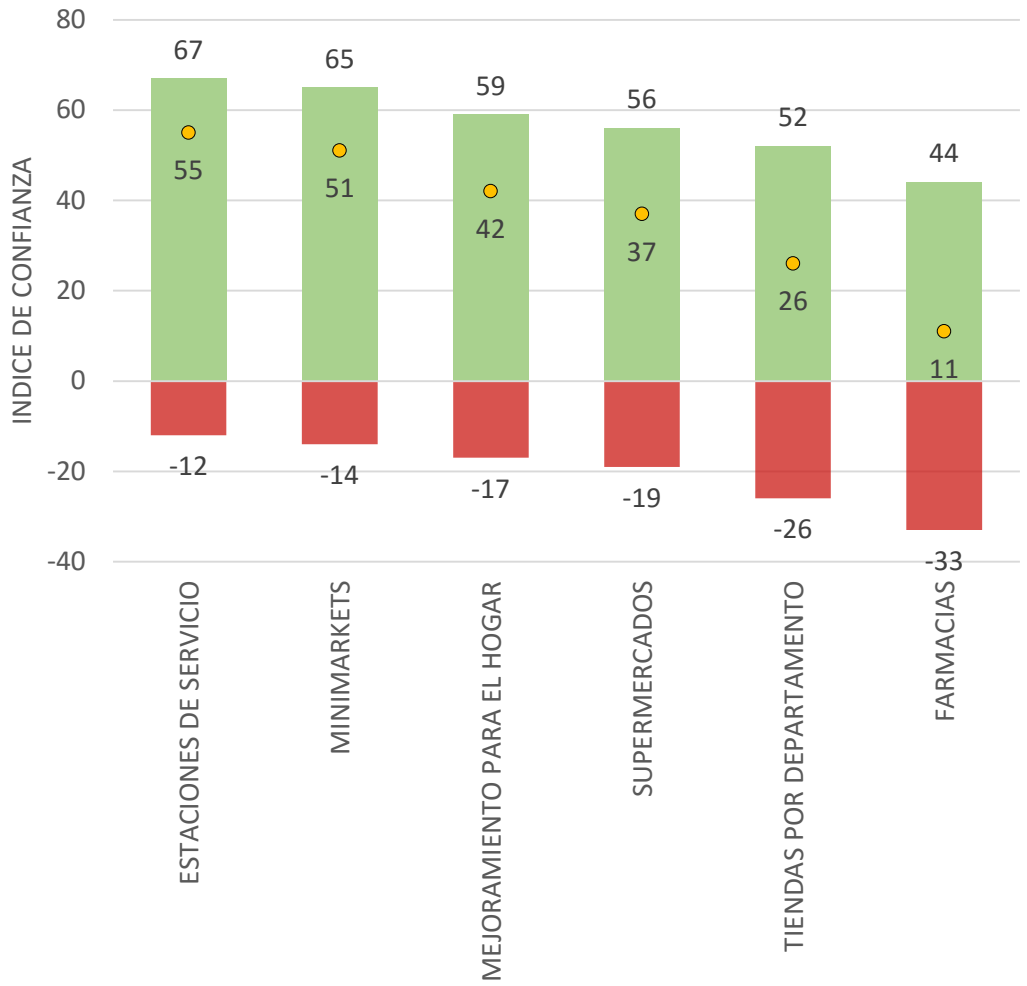
GSE Domiciliarias

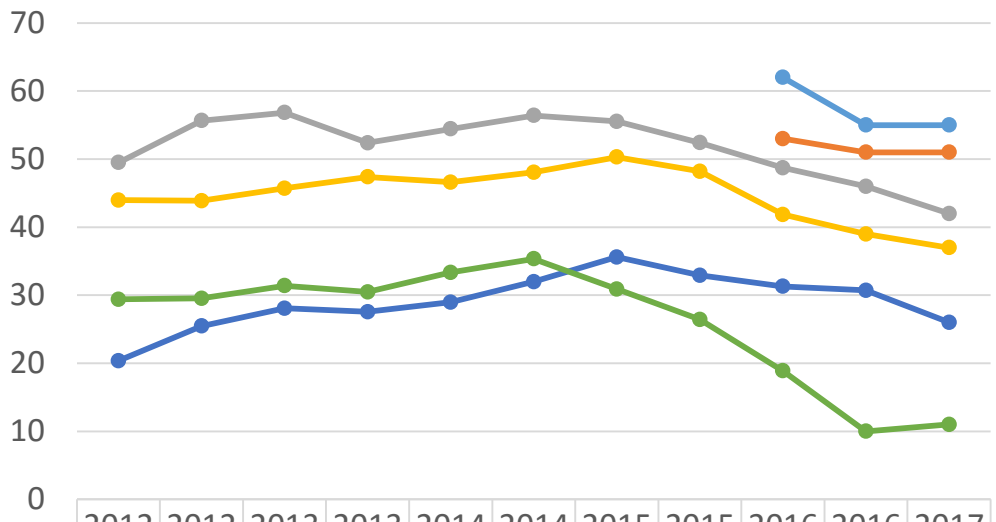



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ABC1 | 24 | 31 | 38 | 41 | 49 | 52 | 40 | 37 | 40 | 33 | 28 |
| C2 | 36 | 40 | 44 | 43 | 47 | 55 | 50 | 40 | 39 | 33 | 29 |
| C3 | 35 | 42 | 40 | 35 | 44 | 49 | 44 | 39 | 37 | 32 | 29 |
| D-E | 38 | 39 | 40 | 39 | 48 | 49 | 39 | 37 | 39 | 36 | 30 |

# Resultados en la Industria de Retail

# **Evolutivo sectorial**
# en la Industria Retail

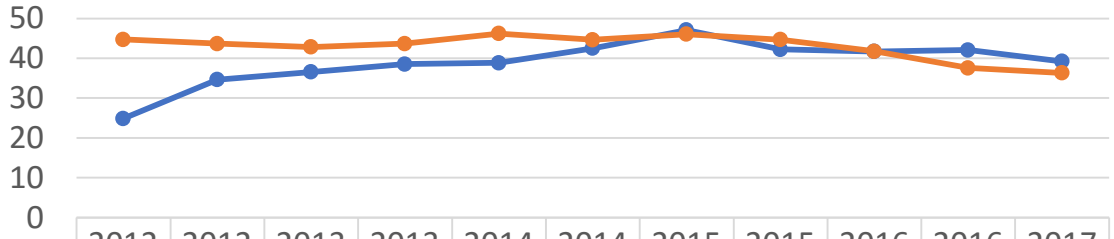



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ESTACIONES DE SERVICIO | | | | | | | | | 62 | 55 | 55 |
| MINIMARKET | | | | | | | | | 53 | 51 | 51 |
| MEJORAMIENTO PARA EL HOGAR | 50 | 56 | 57 | 52 | 54 | 56 | 56 | 52 | 49 | 46 | 42 |
| SUPERMERCADOS | 44 | 44 | 46 | 47 | 47 | 48 | 50 | 48 | 42 | 39 | 37 |
| TIENDAS POR DEPARTAMENTO | 20 | 25 | 28 | 28 | 29 | 32 | 36 | 33 | 31 | 31 | 26 |
| FARMACIAS | 29 | 30 | 31 | 30 | 33 | 35 | 31 | 26 | 19 | 10 | 11 |

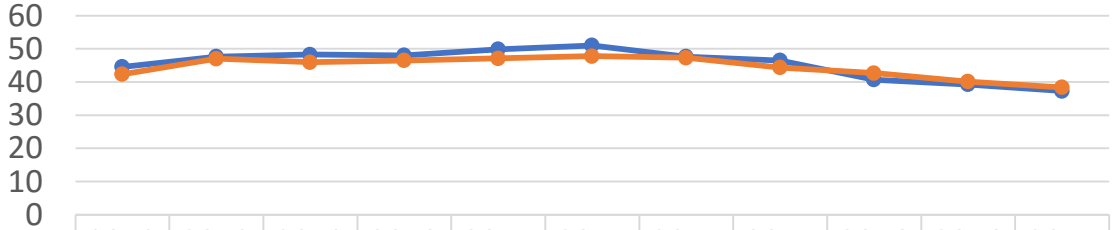
# Evolutivos socio-demográficos en el Retail

SEXO RETAIL



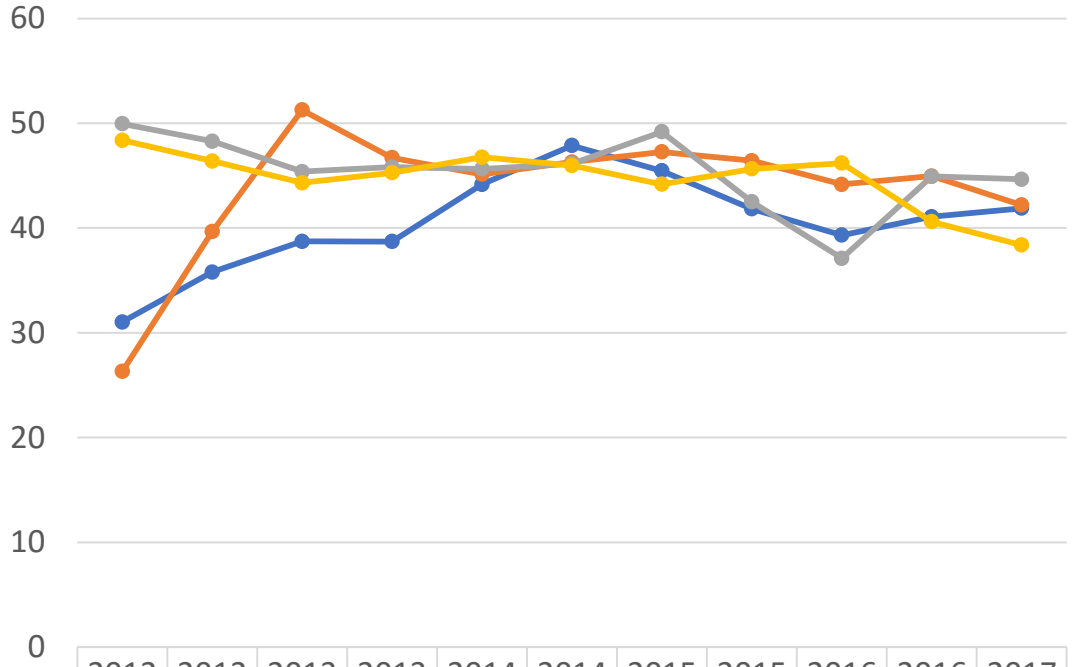

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| HOMBRE | 25 | 35 | 37 | 39 | 39 | 42 | 47 | 42 | 42 | 42 | 39 |
| MUJER | 45 | 44 | 43 | 44 | 46 | 45 | 46 | 45 | 42 | 38 | 36 |

ZONA RETAIL



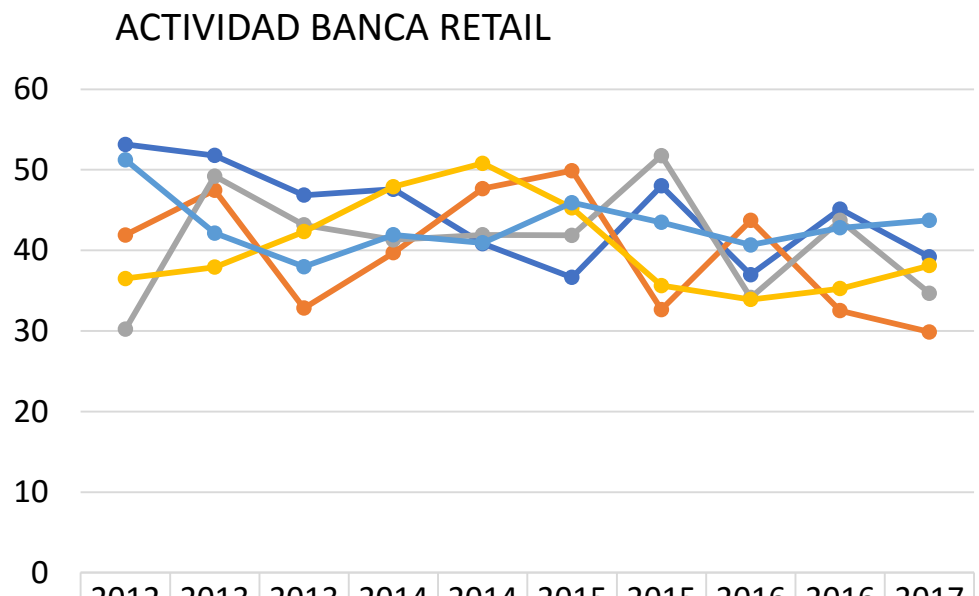

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| R.M. | 45 | 48 | 48 | 48 | 50 | 51 | 48 | 46 | 41 | 39 | 37 |
| Regiones | 42 | 47 | 46 | 46 | 47 | 48 | 47 | 44 | 43 | 40 | 38 |

Edad Retail

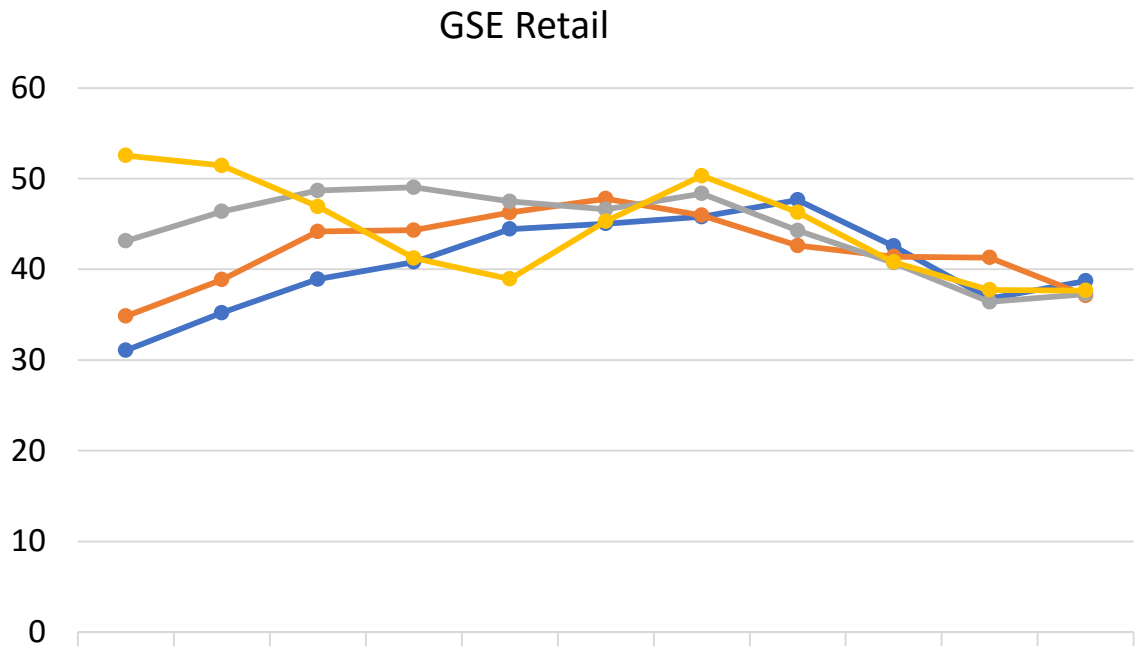



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Menor que 30 | 31 | 36 | 39 | 39 | 44 | 48 | 45 | 42 | 39 | 41 | 42 |
| 30 - 44 | 26 | 40 | 51 | 47 | 45 | 46 | 47 | 46 | 44 | 45 | 42 |
| 45 - 59 | 50 | 48 | 45 | 46 | 46 | 46 | 49 | 42 | 37 | 45 | 45 |
| 60 o más | 48 | 46 | 44 | 45 | 47 | 46 | 44 | 46 | 46 | 41 | 38 |

# **Evolutivos socio-demográficos** en el Retail




| | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|
| Dueña de casa | 53 | 52 | 47 | 48 | 41 | 37 | 48 | 37 | 45 | 39 |
| Trabaja fuera de casa | 42 | 47 | 33 | 40 | 48 | 50 | 33 | 44 | 33 | 30 |
| Estudiante | 30 | 49 | 43 | 41 | 42 | 42 | 52 | 34 | 44 | 35 |
| Busca trabajo | 36 | 38 | 42 | 48 | 51 | 45 | 36 | 34 | 35 | 38 |
| Jubilado | 51 | 42 | 38 | 42 | 41 | 46 | 43 | 41 | 43 | 44 |




| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ABC1 | 31 | 35 | 39 | 41 | 44 | 45 | 46 | 48 | 43 | 37 | 39 |
| C2 | 35 | 39 | 44 | 44 | 46 | 48 | 46 | 43 | 41 | 41 | 37 |
| C3 | 43 | 46 | 49 | 49 | 47 | 47 | 48 | 44 | 41 | 36 | 37 |
| D-E | 53 | 51 | 47 | 41 | 39 | 45 | 50 | 46 | 41 | 38 | 38 |

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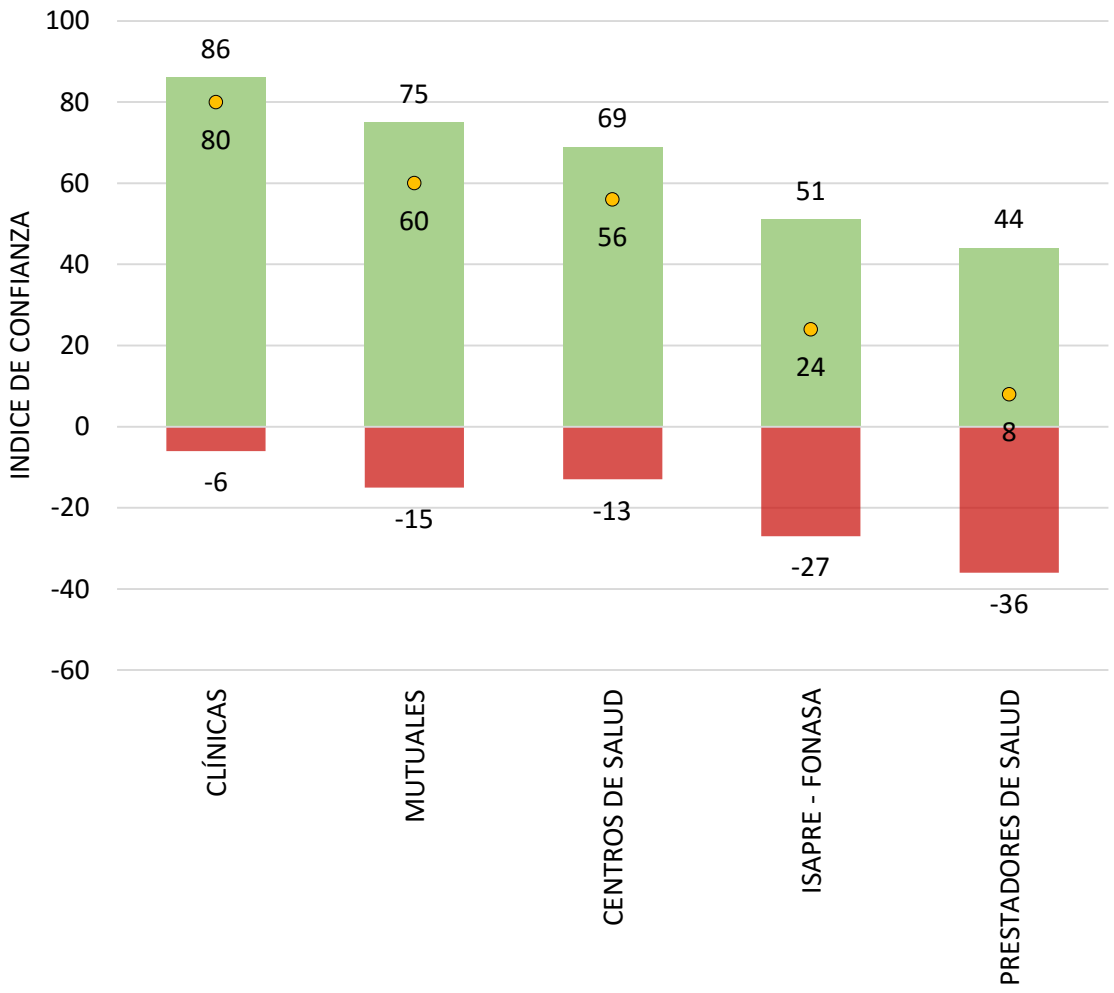
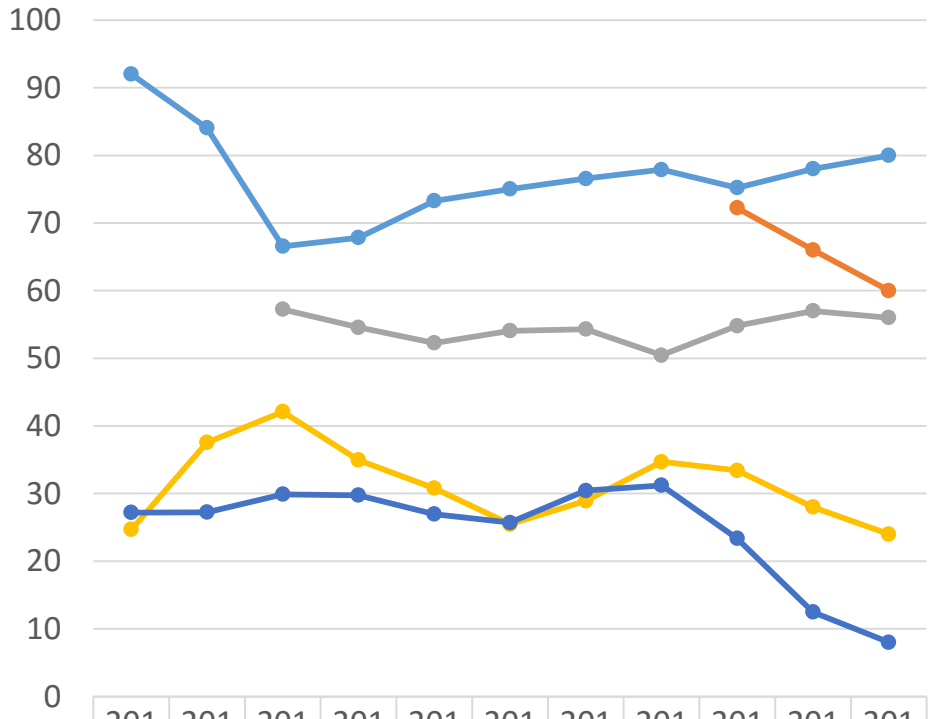
# Resultados en la Industria de Salud

# Evolutivo sectorial
## en la Industria Salud

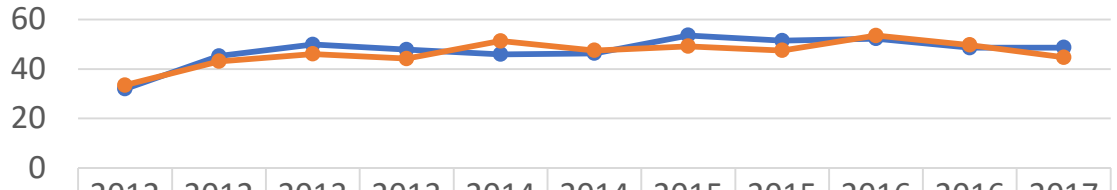



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| CLÍNICAS | 92 | 84 | 67 | 68 | 73 | 75 | 77 | 78 | 75 | 78 | 80 |
| MUTUALES | | | | | | | | | 72 | 66 | 60 |
| CENTROS DE SALUD | | | 57 | 55 | 52 | 54 | 54 | 50 | 55 | 57 | 56 |
| ISAPRE - FONASA | 25 | 38 | 42 | 35 | 31 | 25 | 29 | 35 | 33 | 28 | 24 |
| PRESTADORES DE SALUD | 27 | 27 | 30 | 30 | 27 | 26 | 30 | 31 | 23 | 12 | 8 |

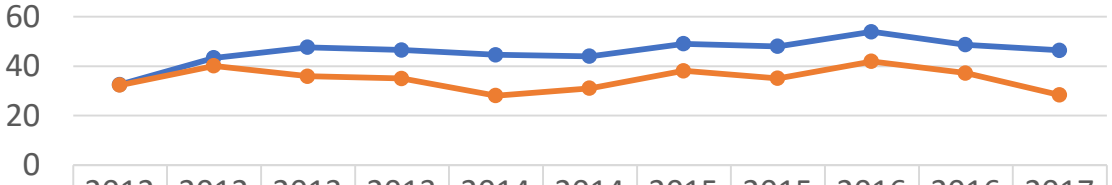
# Evolutivos socio-demográficos en la Salud

SEXO SALUD



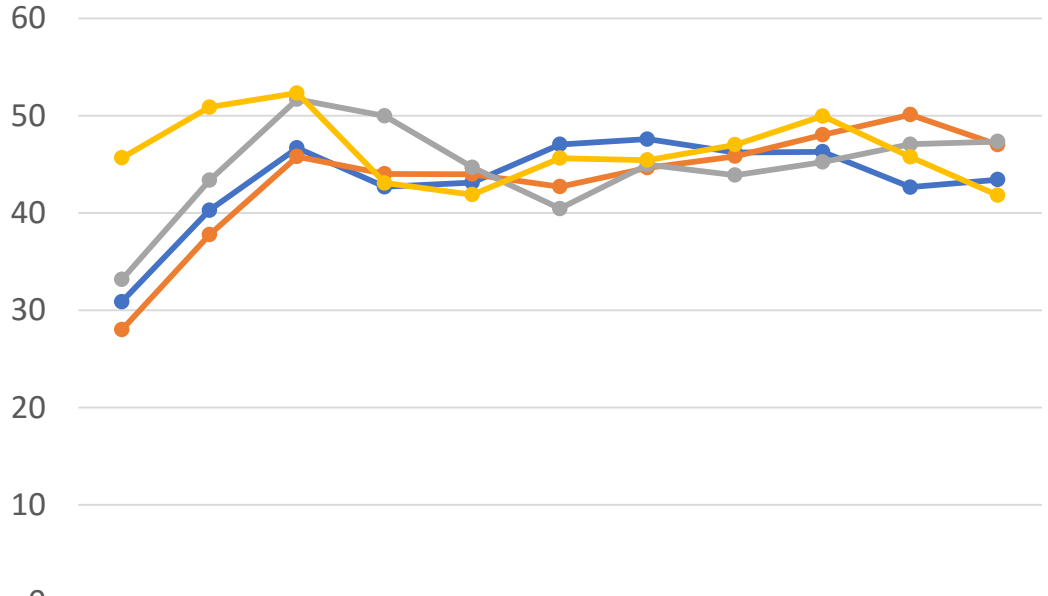

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| HOMBRE | 32 | 45 | 50 | 48 | 46 | 46 | 54 | 51 | 52 | 49 | 49 |
| MUJER | 33 | 43 | 46 | 44 | 51 | 47 | 49 | 47 | 54 | 50 | 45 |

ZONA SALUD



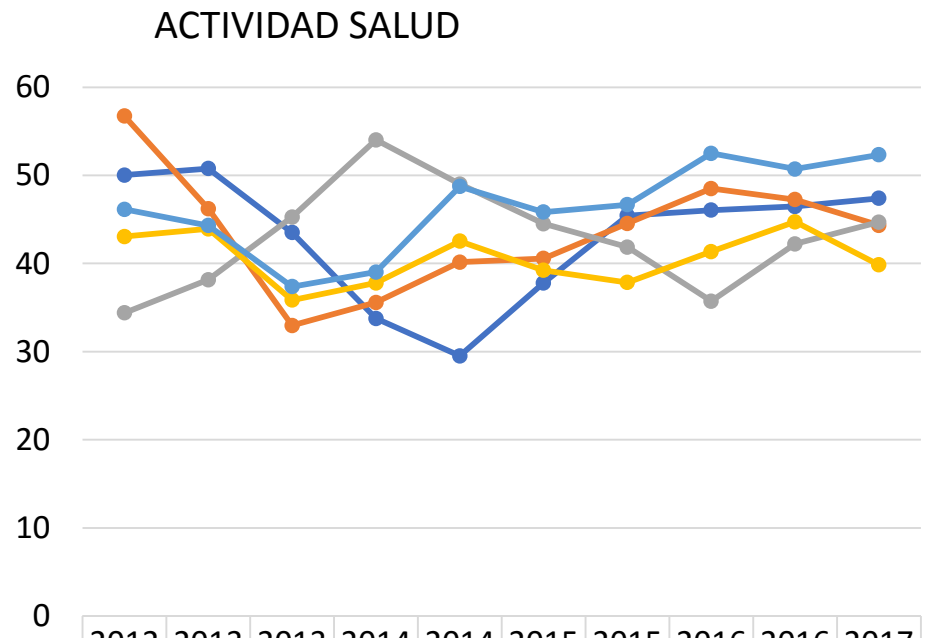

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| R.M. | 33 | 43 | 48 | 47 | 45 | 44 | 49 | 48 | 54 | 49 | 46 |
| Regiones | 32 | 40 | 36 | 35 | 28 | 31 | 38 | 35 | 42 | 37 | 28 |

Edad Salud

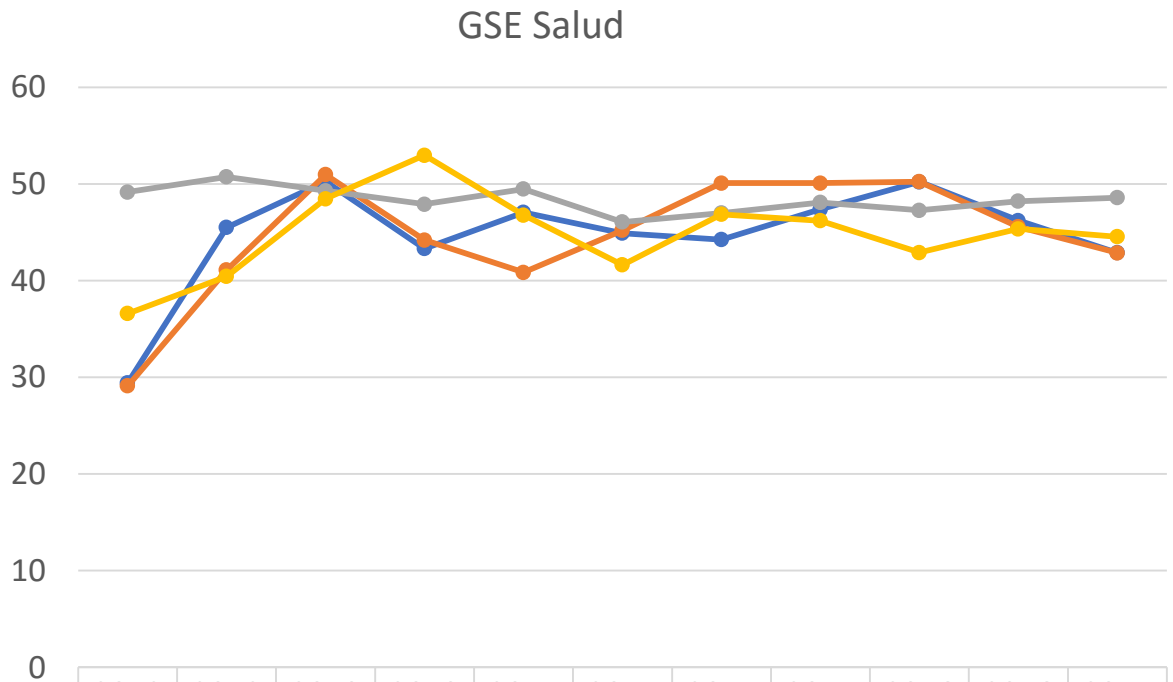



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Menor que 30 | 31 | 40 | 47 | 43 | 43 | 47 | 48 | 46 | 46 | 43 | 43 |
| 30 - 44 | 28 | 38 | 46 | 44 | 44 | 43 | 45 | 46 | 48 | 50 | 47 |
| 45 - 59 | 33 | 43 | 52 | 50 | 45 | 40 | 45 | 44 | 45 | 47 | 47 |
| 60 o más | 46 | 51 | 52 | 43 | 42 | 46 | 45 | 47 | 50 | 46 | 42 |

# Evolutivos socio-demográficos en la Salud




| | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|
| Dueña de casa | 50 | 51 | 44 | 34 | 30 | 38 | 45 | 46 | 46 | 47 |
| Trabaja fuera de casa | 57 | 46 | 33 | 36 | 40 | 41 | 45 | 48 | 47 | 44 |
| Estudiante | 34 | 38 | 45 | 54 | 49 | 45 | 42 | 36 | 42 | 45 |
| Busca trabajo | 43 | 44 | 36 | 38 | 43 | 39 | 38 | 41 | 45 | 40 |
| Jubilado | 46 | 44 | 37 | 39 | 49 | 46 | 47 | 52 | 51 | 52 |




| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ABC1 | 29 | 45 | 50 | 43 | 47 | 45 | 44 | 47 | 50 | 46 | 43 |
| C2 | 29 | 41 | 51 | 44 | 41 | 45 | 50 | 50 | 50 | 46 | 43 |
| C3 | 49 | 51 | 49 | 48 | 49 | 46 | 47 | 48 | 47 | 48 | 49 |
| D-E | 37 | 40 | 48 | 53 | 47 | 42 | 47 | 46 | 43 | 45 | 45 |

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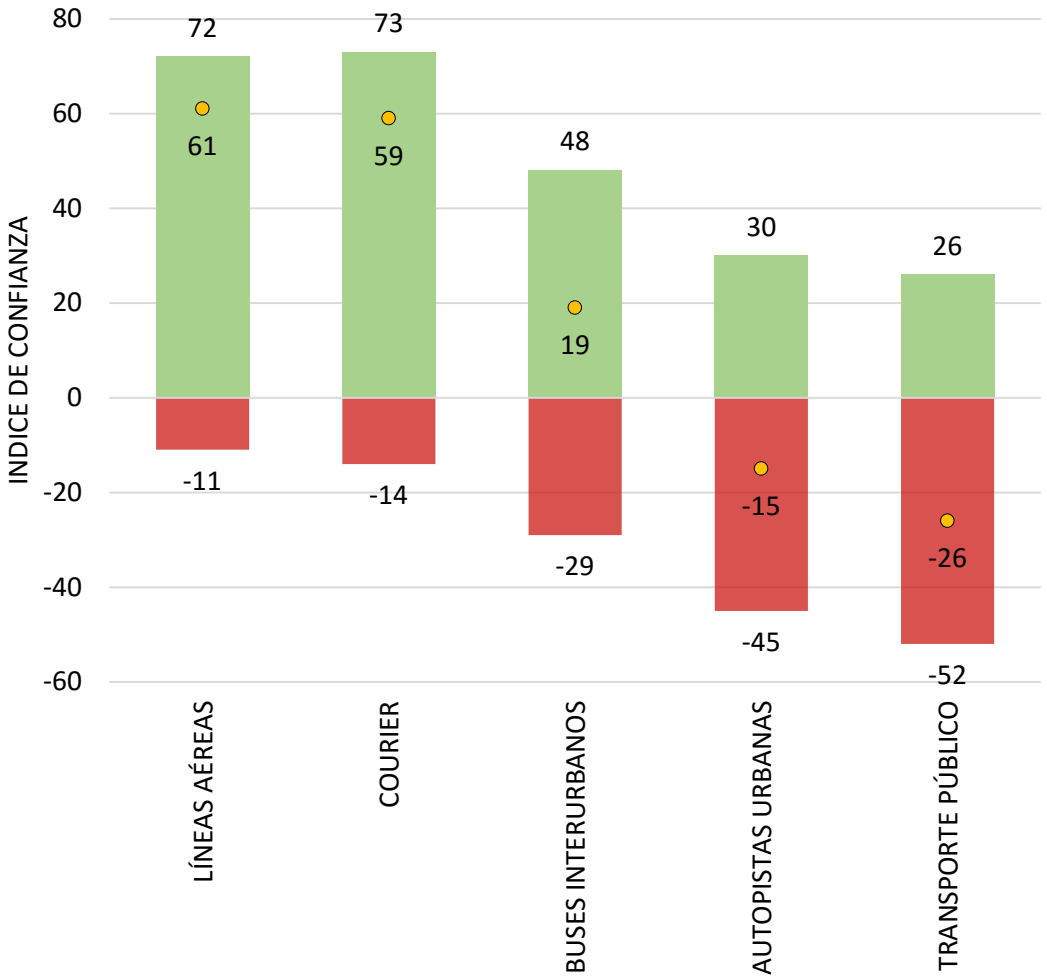
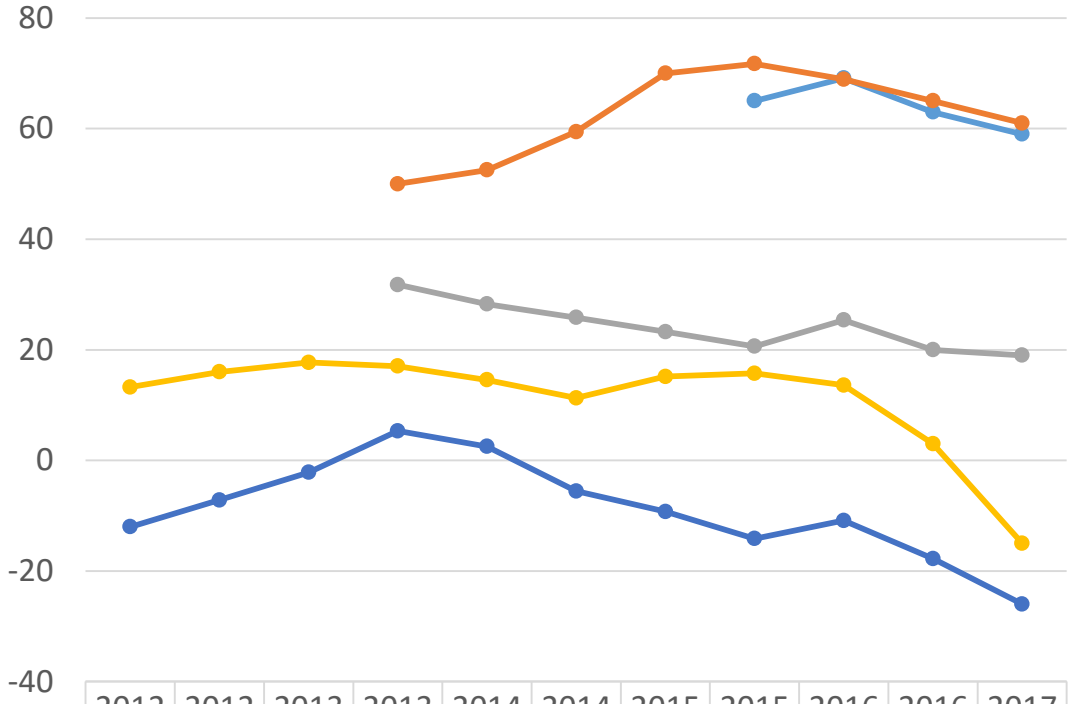
# Resultados en la Industria de Transporte y Logística

# Evolutivo sectorial
## en Transporte y Logística

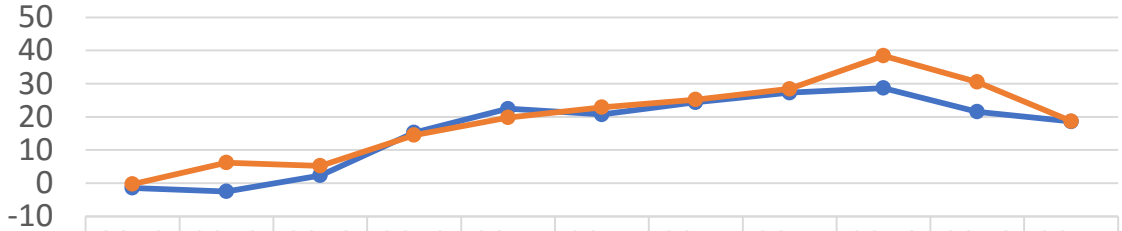



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| COURIER | | | | | | | | 65 | 69 | 63 | 59 |
| LÍNEAS AÉREAS | | | | 50 | 53 | 59 | 70 | 72 | 69 | 65 | 61 |
| BUSES INTERURBANOS | | | | 32 | 28 | 26 | 23 | 21 | 25 | 20 | 19 |
| AUTOPISTAS URBANAS | 13 | 16 | 18 | 17 | 15 | 11 | 15 | 16 | 14 | 3 | -15 |
| TRANSPORTE PÚBLICO | -12 | -7 | -2 | 5 | 3 | -6 | -9 | -14 | -11 | -18 | -26 |

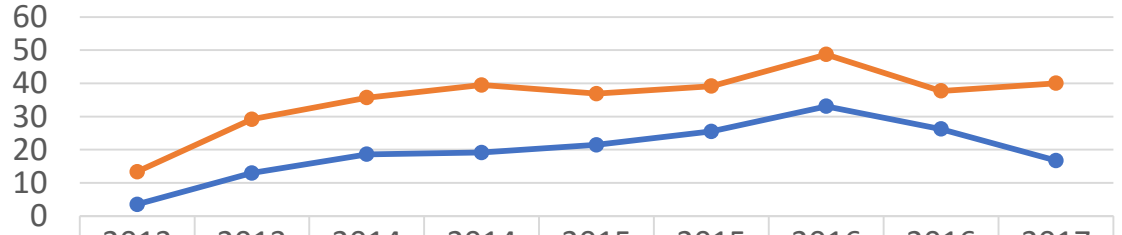
# Evolutivos socio-demográficos
## en Transporte y Logística

SEXO TRANSPORTE



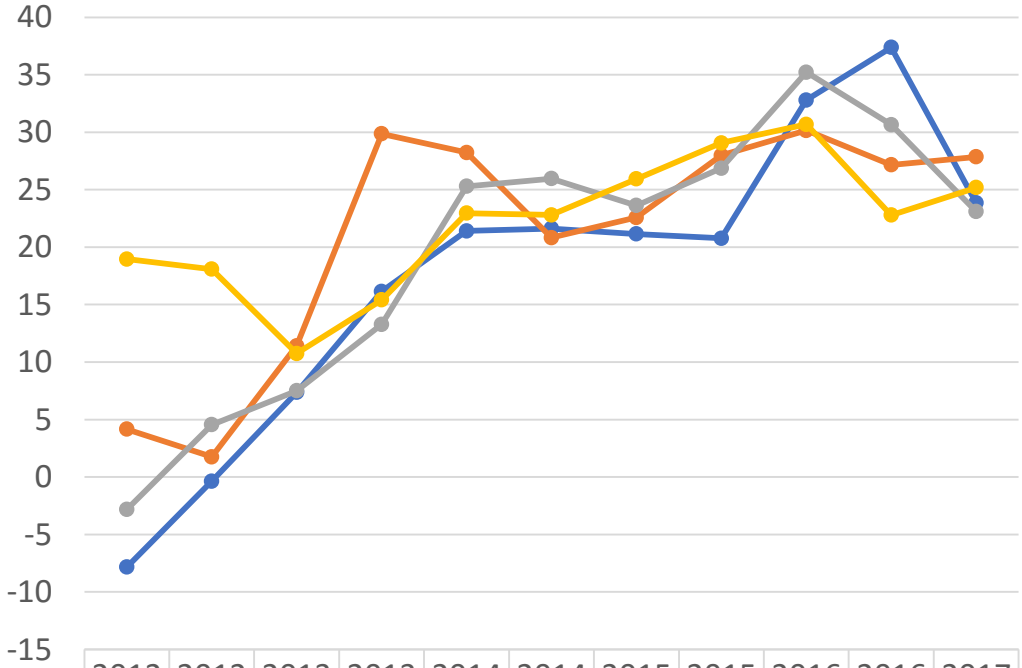

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| HOMBRE | -1 | -3 | 2 | 15 | 22 | 21 | 24 | 27 | 29 | 22 | 19 |
| MUJER | 0 | 6 | 5 | 14 | 20 | 23 | 25 | 28 | 38 | 30 | 19 |

ZONA TRANSPORTE




| | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|
| R.M. | 4 | 13 | 19 | 19 | 21 | 25 | 33 | 26 | 17 |
| Regiones | 13 | 29 | 36 | 39 | 37 | 39 | 49 | 38 | 40 |

Edad Transporte

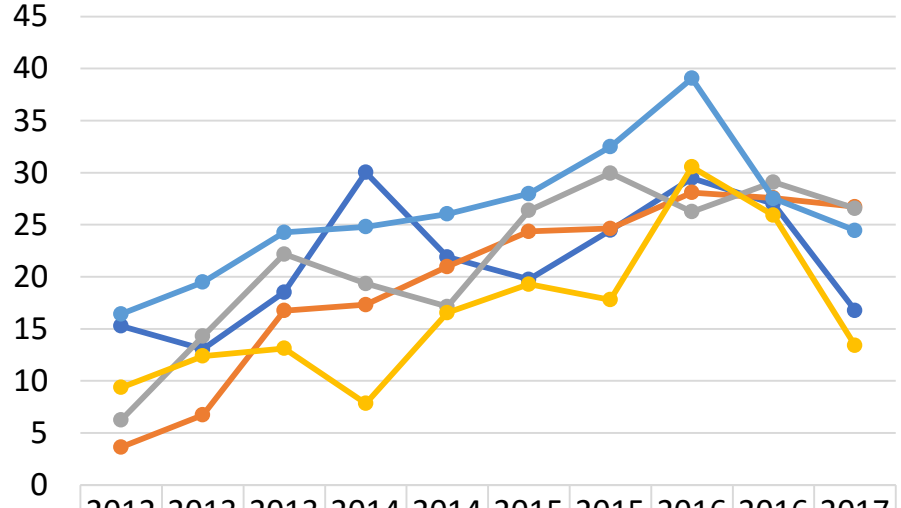



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Menor que 30 | -8 | 0 | 7 | 16 | 21 | 22 | 21 | 21 | 33 | 37 | 24 |
| 30 - 44 | 4 | 2 | 11 | 30 | 28 | 21 | 23 | 28 | 30 | 27 | 28 |
| 45 - 59 | -3 | 5 | 8 | 13 | 25 | 26 | 24 | 27 | 35 | 31 | 23 |
| 60 o más | 19 | 18 | 11 | 15 | 23 | 23 | 26 | 29 | 31 | 23 | 25 |

Nota: estas series poseen nuevos sectores entre los años 2013 y 2015 (a esto se debe la forma creciente, ya que las nuevas marcas poseen valores más altos en el índice de confianza).

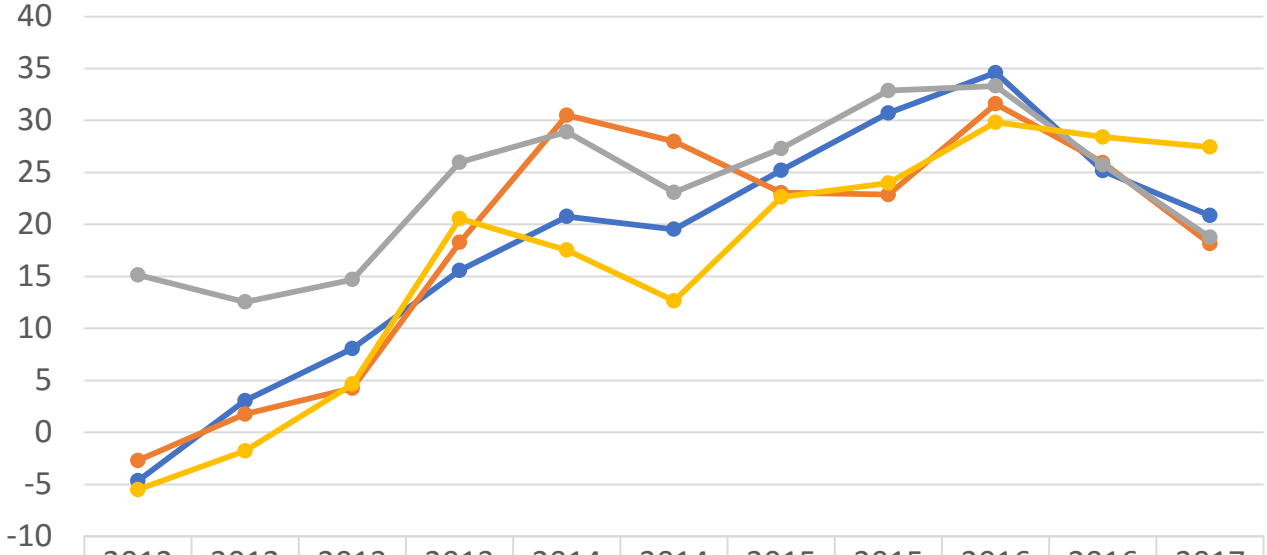
# Evolutivos socio-demográficos
## en Transporte y Logística

ACTIVIDAD TRANSPORTE




| | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|
| Dueña de casa | 15 | 13 | 19 | 30 | 22 | 20 | 24 | 29 | 27 | 17 |
| Trabaja fuera de casa | 4 | 7 | 17 | 17 | 21 | 24 | 25 | 28 | 28 | 27 |
| Estudiante | 6 | 14 | 22 | 19 | 17 | 26 | 30 | 26 | 29 | 27 |
| Busca trabajo | 9 | 12 | 13 | 8 | 17 | 19 | 18 | 31 | 26 | 13 |
| Jubilado | 16 | 19 | 24 | 25 | 26 | 28 | 32 | 39 | 28 | 24 |

GSE Transporte




| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ABC1 | -5 | 3 | 8 | 16 | 21 | 20 | 25 | 31 | 35 | 25 | 21 |
| C2 | -3 | 2 | 4 | 18 | 30 | 28 | 23 | 23 | 32 | 26 | 18 |
| C3 | 15 | 13 | 15 | 26 | 29 | 23 | 27 | 33 | 33 | 26 | 19 |
| D-E | -6 | -2 | 5 | 21 | 18 | 13 | 23 | 24 | 30 | 28 | 27 |

Nota: estas series poseen nuevos sectores en el año 2013 y 2015 (a esto se debe la forma creciente, ya que las nuevas marcas poseen valores más altos en el índice de credibilidad).

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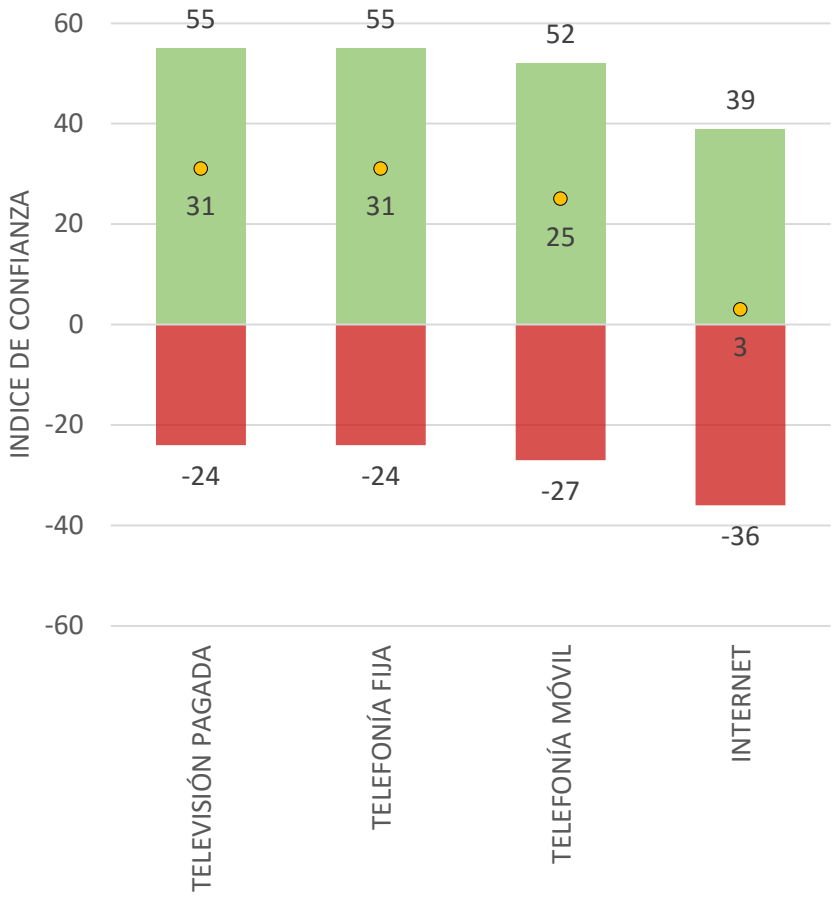
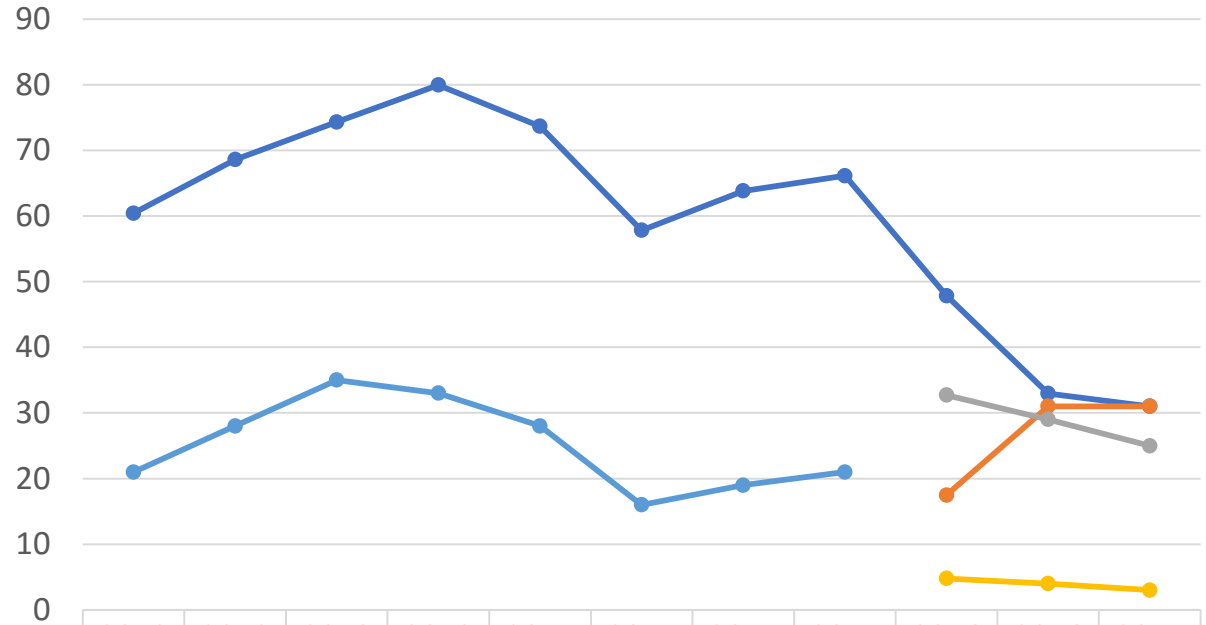
# Resultados en la Industria TELCO

# Evolutivo sectorial
en las TELCO



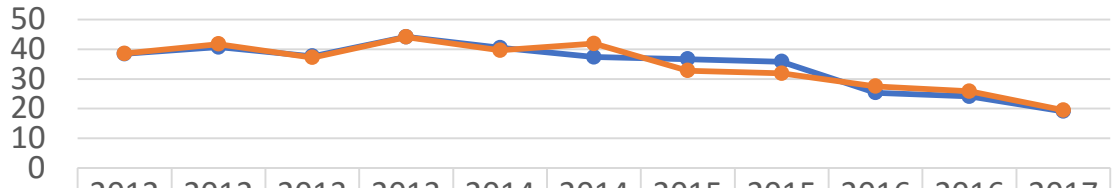




| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| TELEVISIÓN PAGADA | 60 | 69 | 74 | 80 | 74 | 58 | 64 | 66 | 48 | 33 | 31 |
| TELEFONÍA FIJA | | | | | | | | | 17 | 31 | 31 |
| TELEFONÍA MÓVIL | | | | | | | | | 33 | 29 | 25 |
| INTERNET | | | | | | | | | 5 | 4 | 3 |
| TRIPLE PACK | 21 | 28 | 35 | 33 | 28 | 16 | 19 | 21 | | | |

Note que la caída de la TV pagada se explica por la separación del sector Triple Pack a sectores por separado, actualmente las marcas que pertenecían a Triple Pack ahora son parte de TV pagada.

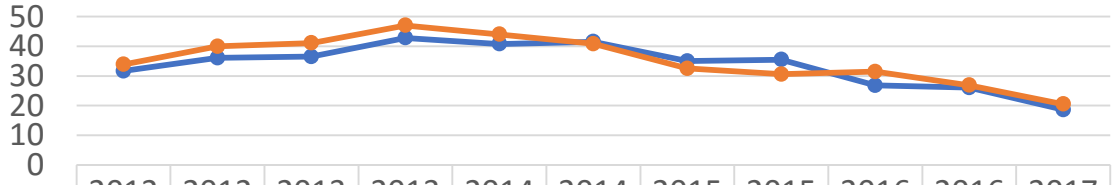
# **Evolutivos socio-demográficos** en las Telecomunicaciones

SEXO TELCO



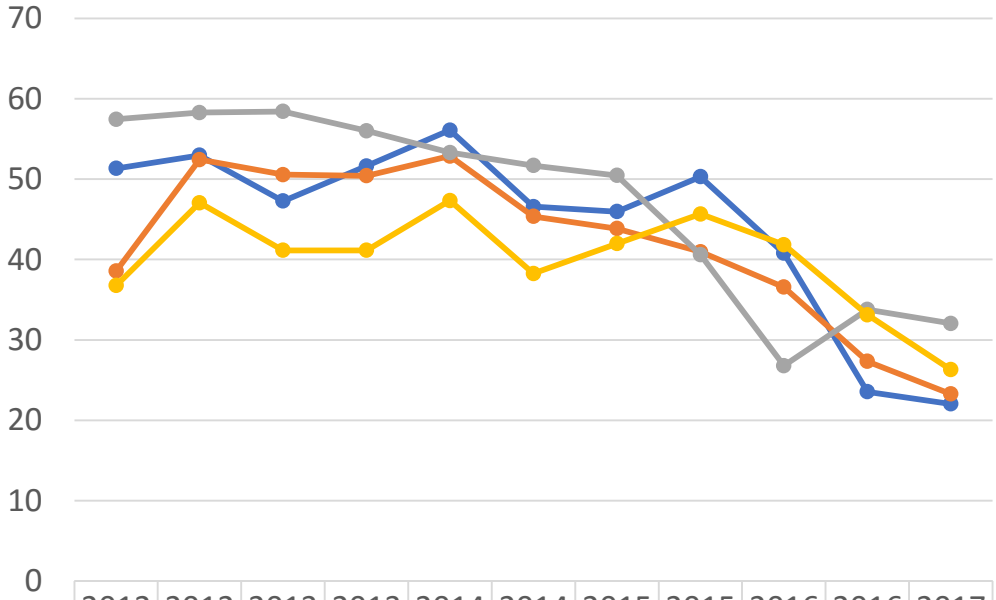

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| HOMBRE | 38 | 41 | 38 | 44 | 41 | 37 | 37 | 36 | 25 | 24 | 19 |
| MUJER | 39 | 42 | 37 | 44 | 40 | 42 | 33 | 32 | 27 | 26 | 19 |

ZONA TELCO



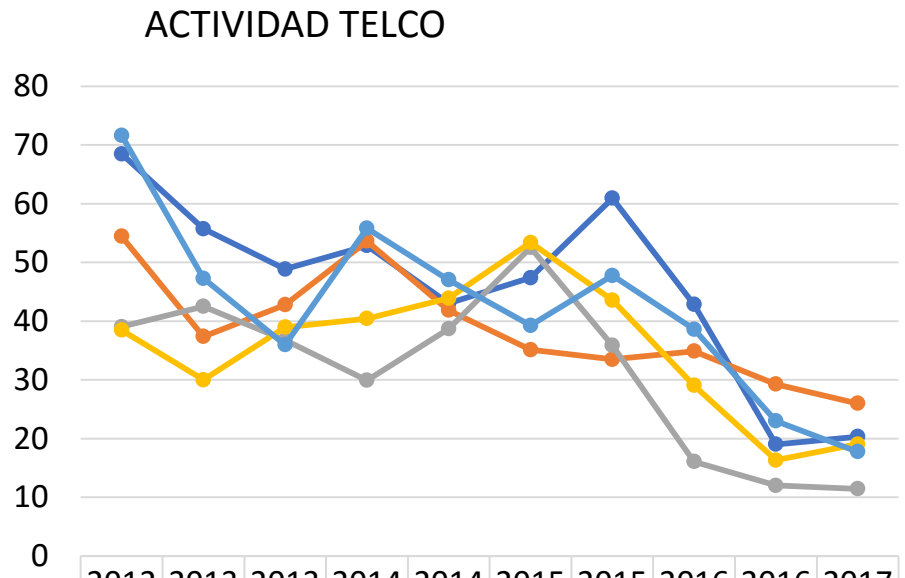

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| R.M. | 32 | 36 | 37 | 43 | 41 | 42 | 35 | 35 | 27 | 26 | 19 |
| Regiones | 34 | 40 | 41 | 47 | 44 | 41 | 33 | 31 | 31 | 27 | 21 |

Edad Telco

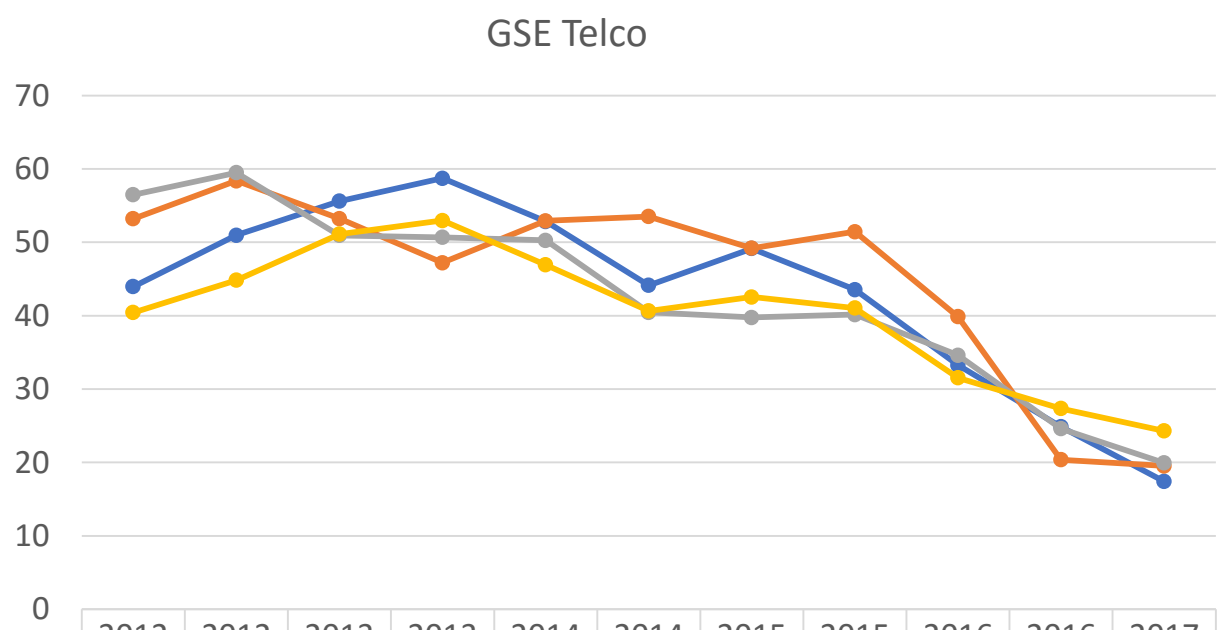



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Menor que 30 | 51 | 53 | 47 | 52 | 56 | 47 | 46 | 50 | 41 | 24 | 22 |
| 30 - 44 | 39 | 52 | 51 | 50 | 53 | 45 | 44 | 41 | 37 | 27 | 23 |
| 45 - 59 | 57 | 58 | 58 | 56 | 53 | 52 | 50 | 41 | 27 | 34 | 32 |
| 60 o más | 37 | 47 | 41 | 41 | 47 | 38 | 42 | 46 | 42 | 33 | 26 |

# Evolutivos socio-demográficos
en las Telecomunicaciones




| | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|
| Dueña de casa | 68 | 56 | 49 | 53 | 43 | 47 | 61 | 43 | 19 | 20 |
| Trabaja fuera de casa | 54 | 37 | 43 | 54 | 42 | 35 | 33 | 35 | 29 | 26 |
| Estudiante | 39 | 43 | 37 | 30 | 39 | 53 | 36 | 16 | 12 | 11 |
| Busca trabajo | 38 | 30 | 39 | 40 | 44 | 53 | 44 | 29 | 16 | 19 |
| Jubilado | 72 | 47 | 36 | 56 | 47 | 39 | 48 | 39 | 23 | 18 |




| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ABC1 | 44 | 51 | 56 | 59 | 53 | 44 | 49 | 44 | 33 | 25 | 17 |
| C2 | 53 | 58 | 53 | 47 | 53 | 54 | 49 | 51 | 40 | 20 | 20 |
| C3 | 56 | 59 | 51 | 51 | 50 | 40 | 40 | 40 | 35 | 25 | 20 |
| D-E | 40 | 45 | 51 | 53 | 47 | 41 | 43 | 41 | 32 | 27 | 24 |

Nota: la alta variabilidad en los jubilados es debido al bajo tamaño muestral de este grupo.

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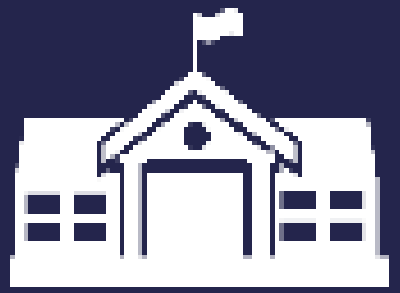
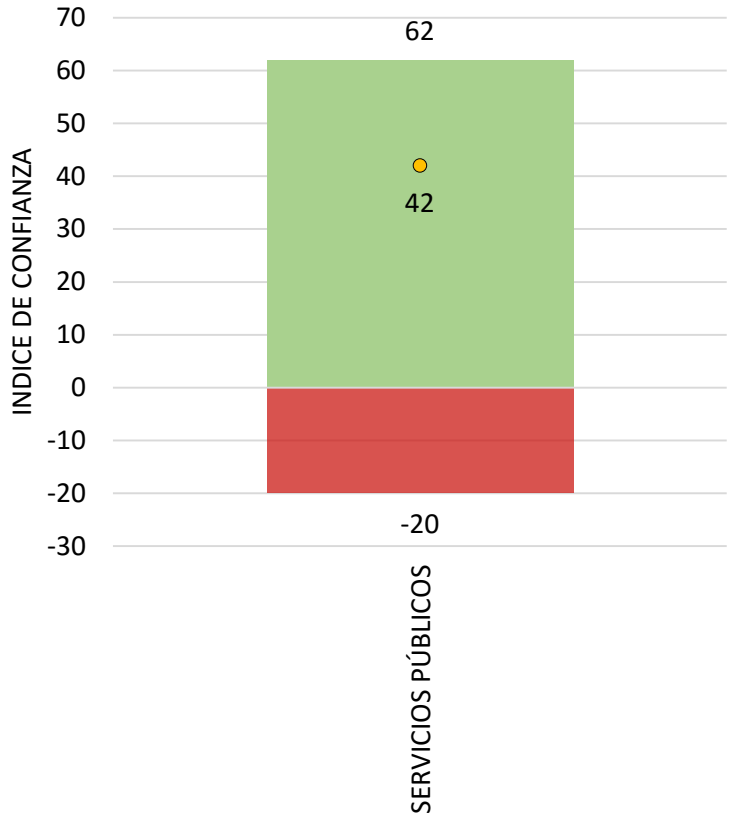
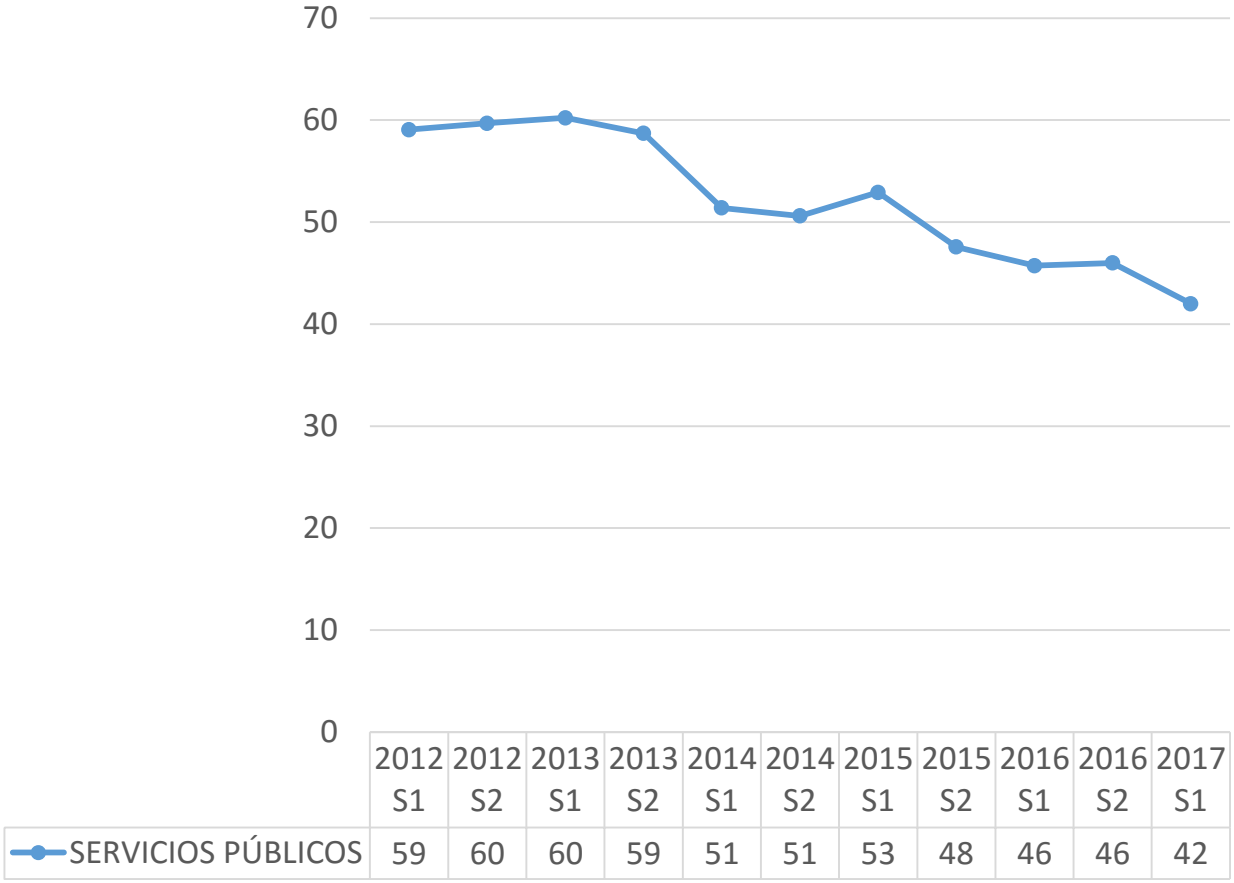
# Resultados en la Industria de Servicios Públicos



# Evolutivo sectorial
## en los servicios públicos

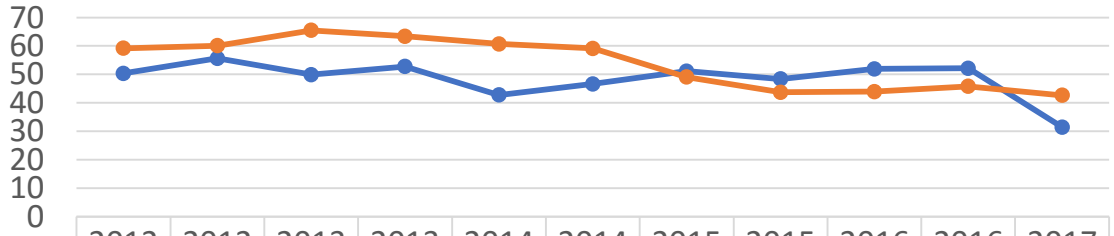



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| SERVICIOS PÚBLICOS | 59 | 60 | 60 | 59 | 51 | 51 | 53 | 48 | 46 | 46 | 42 |

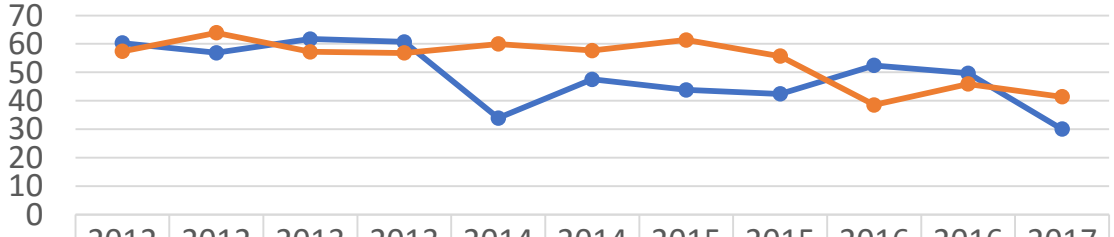
# **Evolutivos socio-demográficos** en los Servicios Públicos

SEXO SERVICIOS



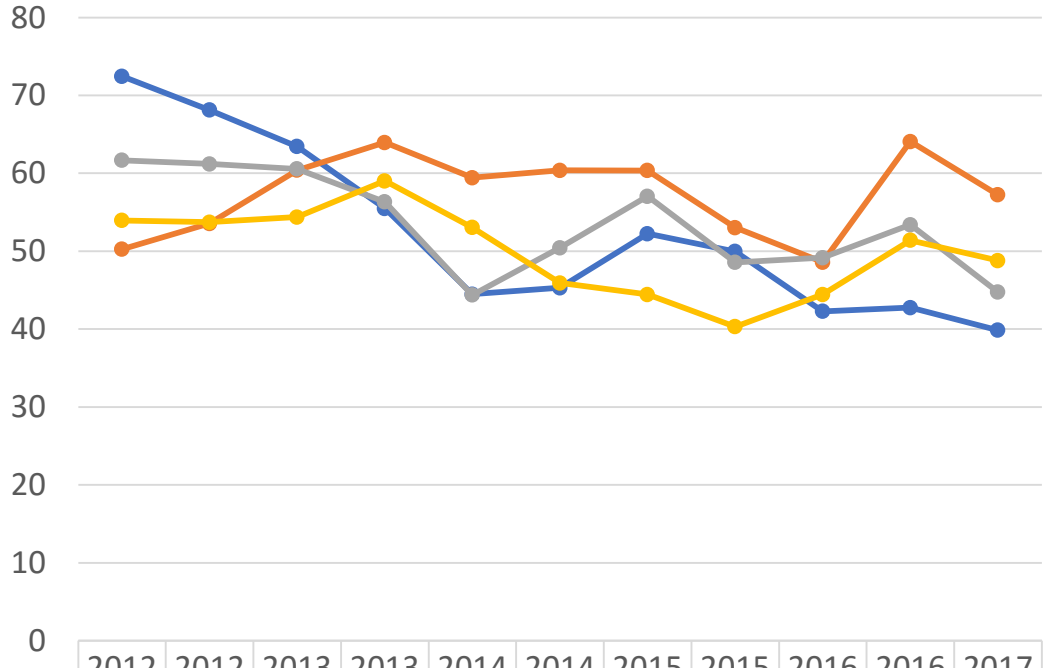

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| HOMBRE | 50 | 56 | 50 | 53 | 43 | 47 | 51 | 48 | 52 | 52 | 31 |
| MUJER | 59 | 60 | 65 | 63 | 61 | 59 | 49 | 44 | 44 | 46 | 43 |

ZONA SERVICIOS



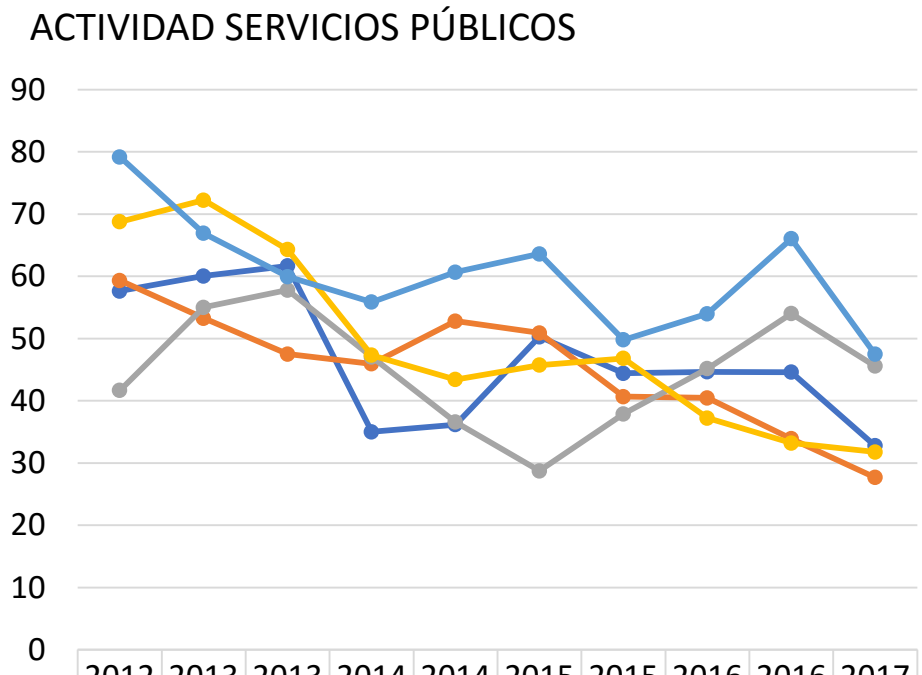

| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| R.M. | 60 | 57 | 62 | 61 | 34 | 48 | 44 | 42 | 52 | 50 | 30 |
| Regiones | 57 | 64 | 57 | 57 | 60 | 58 | 61 | 56 | 39 | 46 | 41 |

Edad Servicios Públicos

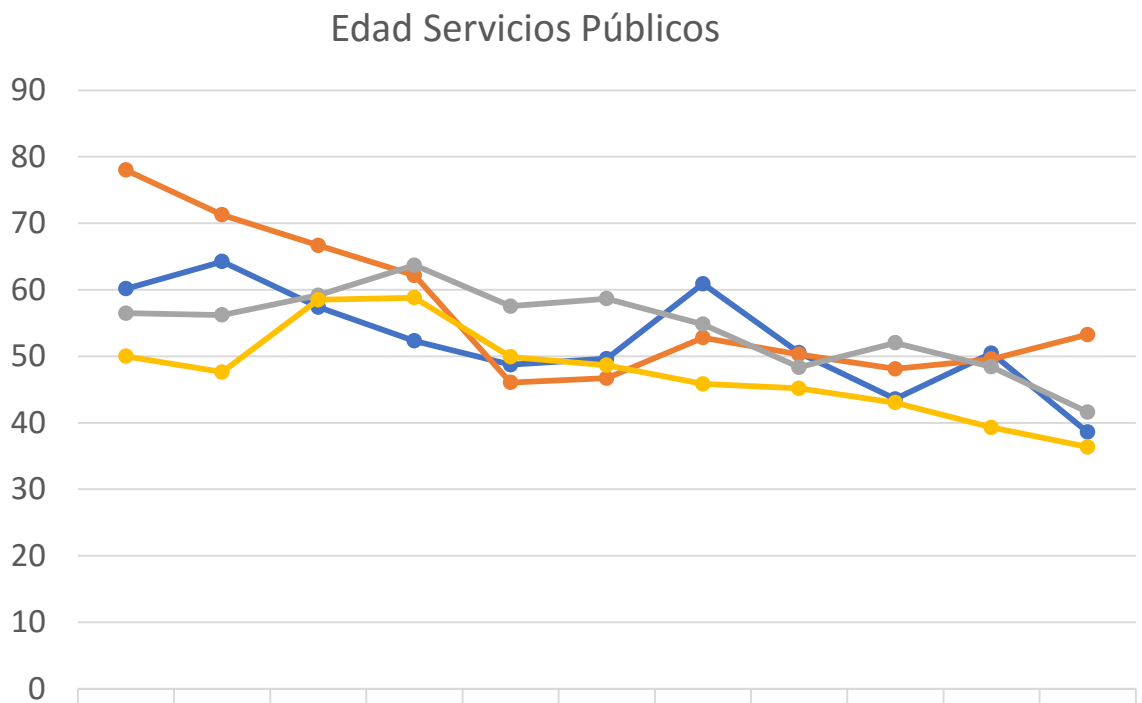



| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Menor que 30 | 72 | 68 | 63 | 55 | 44 | 45 | 52 | 50 | 42 | 43 | 40 |
| 30 - 44 | 50 | 54 | 60 | 64 | 59 | 60 | 60 | 53 | 49 | 64 | 57 |
| 45 - 59 | 62 | 61 | 61 | 56 | 44 | 50 | 57 | 49 | 49 | 53 | 45 |
| 60 o más | 54 | 54 | 54 | 59 | 53 | 46 | 44 | 40 | 44 | 51 | 49 |

# **Evolutivos socio-demográficos** en los Servicios Públicos




| | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|
| Dueña de casa | 58 | 60 | 62 | 35 | 36 | 50 | 44 | 45 | 45 | 33 |
| Trabaja fuera de casa | 59 | 53 | 47 | 46 | 53 | 51 | 41 | 40 | 34 | 28 |
| Estudiante | 42 | 55 | 58 | 47 | 37 | 29 | 38 | 45 | 54 | 46 |
| Busca trabajo | 69 | 72 | 64 | 47 | 43 | 46 | 47 | 37 | 33 | 32 |
| Jubilado | 79 | 67 | 60 | 56 | 61 | 64 | 50 | 54 | 66 | 47 |




| | 2012 S1 | 2012 S2 | 2013 S1 | 2013 S2 | 2014 S1 | 2014 S2 | 2015 S1 | 2015 S2 | 2016 S1 | 2016 S2 | 2017 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ABC1 | 60 | 64 | 57 | 52 | 49 | 50 | 61 | 51 | 44 | 50 | 39 |
| C2 | 78 | 71 | 67 | 62 | 46 | 47 | 53 | 50 | 48 | 50 | 53 |
| C3 | 56 | 56 | 59 | 64 | 58 | 59 | 55 | 48 | 52 | 48 | 42 |
| D-E | 50 | 48 | 59 | 59 | 50 | 49 | 46 | 45 | 43 | 39 | 36 |

# Conclusiones generales del estudio

# Conclusiones generales

- El ICC llega a 35% en el S1 de 2017. Se observa una baja leve pero sostenida desde fines del 2015. Hoy está 3 puntos porcentuales más bajo que el S2 de 2016, y 6 puntos porcentuales más bajo que el S1 de ese mismo año.

- La variación durante el último año es mayor en el porcentaje de notas positivas que en el de las negativas, o sea lo que aumenta más en este período es el segmento de clientes más "indiferentes" frente a las industrias y empresas evaluadas.

- Como ya es habitual, el ICC es menor en empresas de Membresía que en las Transaccionales (35% vs 41%, respectivamente).

# Conclusiones generales

- En las empresas de Membresía, el sector que logra un mejor ICC es el de Gas Cañería con 79%. Hay dos sectores que se encuentran en los últimos lugares y que además obtienen un ICC negativo: las AFP, con -1%, y las Autopistas Urbanas con -15%.

- Para el caso de las Autopistas se observa una fuerte caída que viene ya desde el S1 2016: hoy obtienen 18 puntos porcentuales menos que el semestre anterior, y 29 puntos porcentuales menos que hace un año atrás. Obtienen indicadores negativos en todas las variables asociadas al ICC.

- En el caso de las AFP, se observa una estabilización del indicador, luego de las fuertes bajas que experimentaron durante ambos períodos del año pasado. Si bien se mantiene en el penúltimo lugar en todas las variables, logra porcentajes positivos en Confianza y Transparencia.

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2017

# Resultados Generales ICC
# Primer Semestre