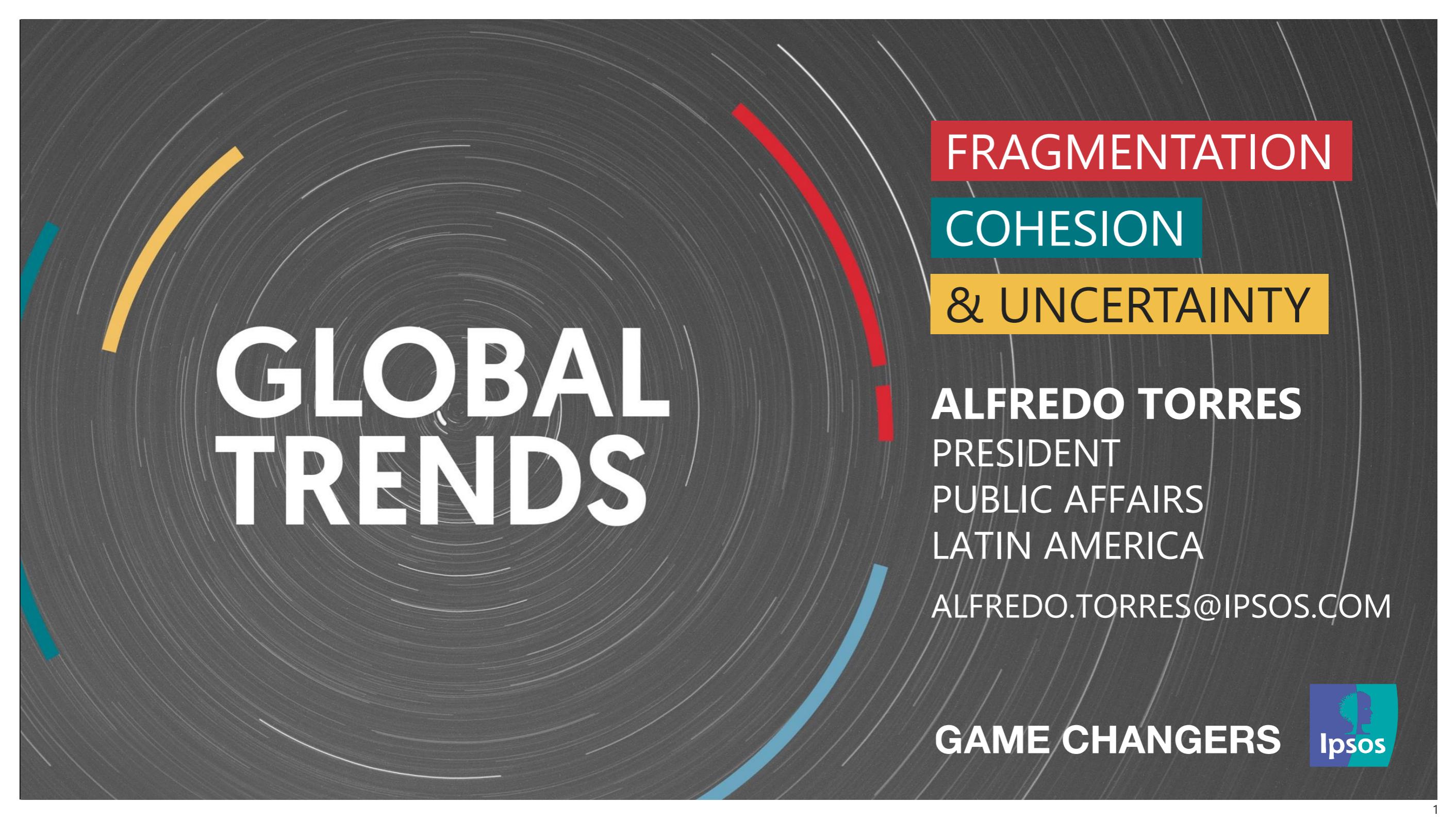


# GLOBAL TRENDS



FRAGMENTATION  
COHESION  
& UNCERTAINTY

ALFREDO TORRES  
PRESIDENT  
PUBLIC AFFAIRS  
LATIN AMERICA

ALFREDO.TORRES@IPSOS.COM

GAME CHANGERS

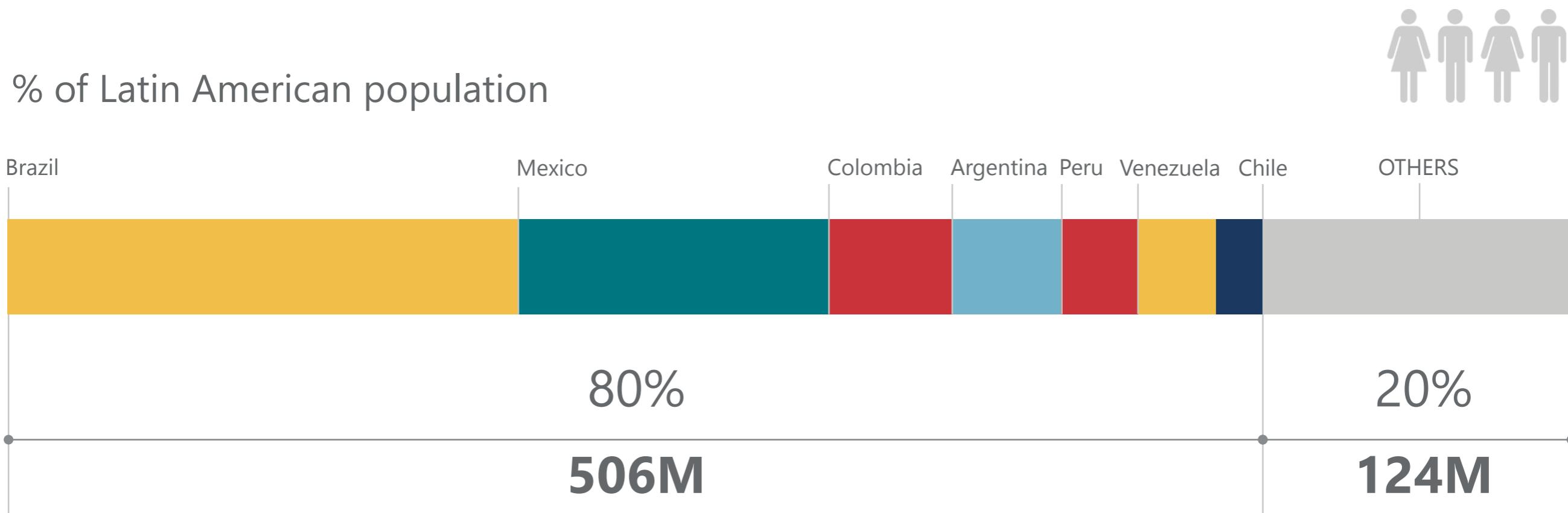




# Socio-Political & Economic Trends in Latin America

There are 26 countries in Latin America & Caribbean, but only 7 make up the vast majority of the region's population

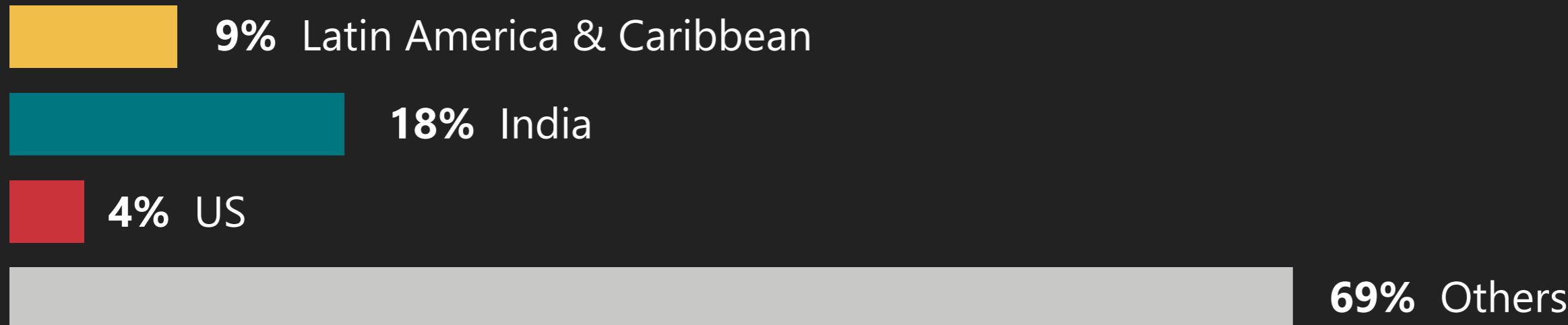
# The 7 largest countries of Latin America make up 80% of the region's population



Source: World Bank 2014

# Latin America is half the size of India, but twice the size of the USA in terms of population

% Of world's population



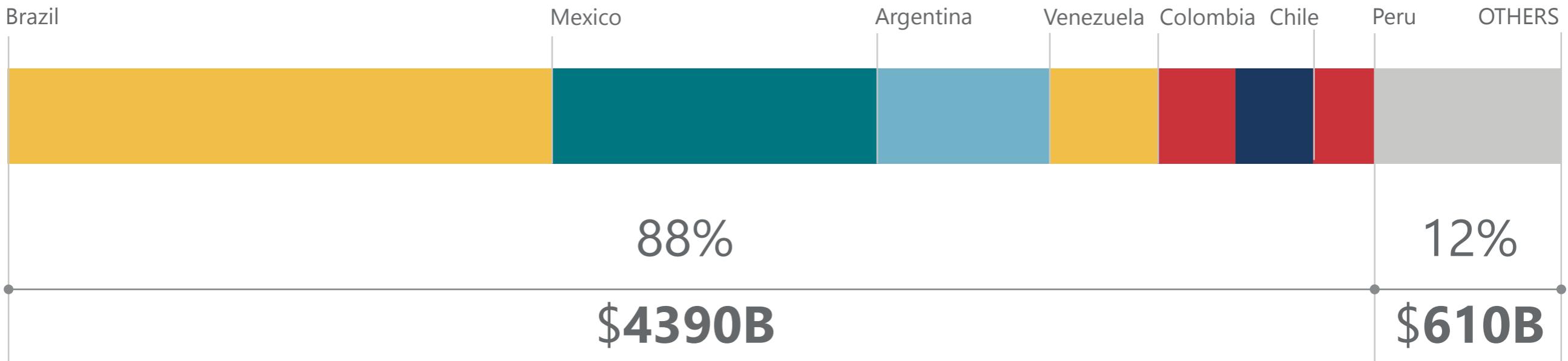
Source: World Bank 2014

GAME CHANGERS



# The 7 largest economies of the region make up 88% of Latin America's GDP

% Distribution of Gross Domestic Product (GDP) in Latin America



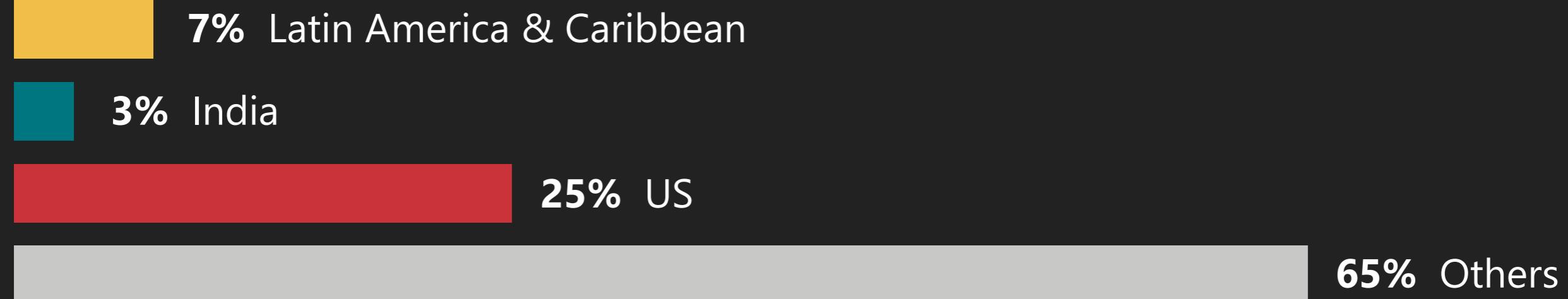
Source: International Monetary Fund, 2016

GAME CHANGERS



# Latin America is twice the size of India, but one third of the size of the USA in terms of GDP

% Distribution of Gross Domestic Product (GDP) in the world

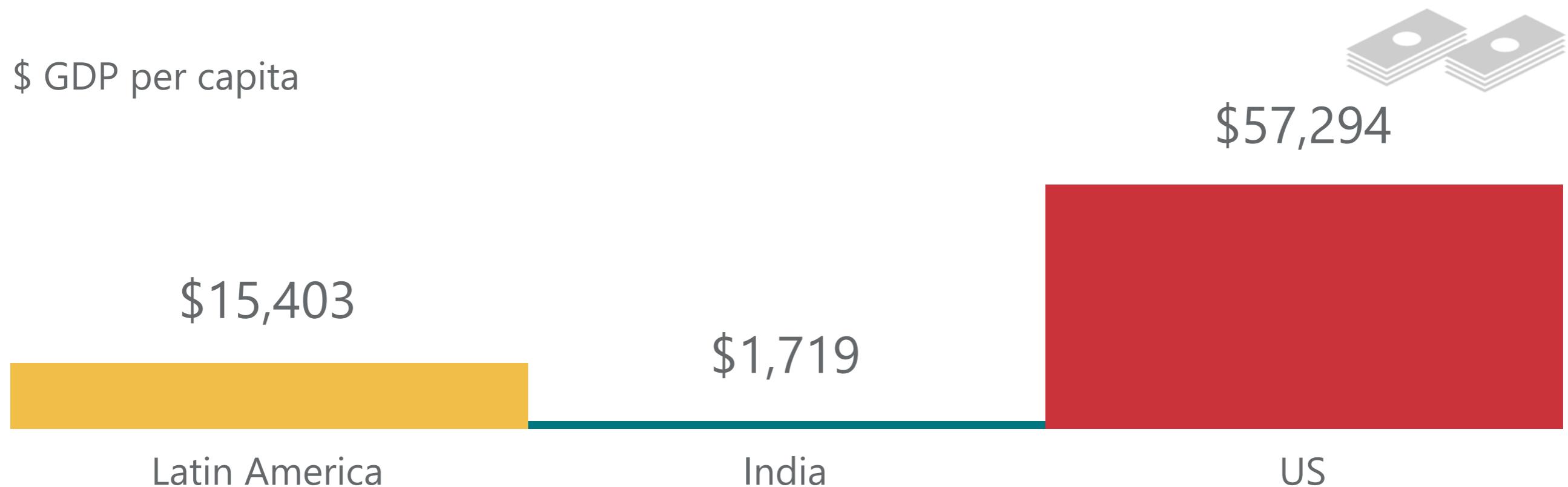


Source: International Monetary Fund, 2016

GAME CHANGERS



# LatAm's GDP per capita is significantly higher than India's, although it is rather low compared to the USA



Source: International Monetary Fund, 2016

**Latin America is a highly unequal region, but the middle class have been growing steadily during the last two decades.**

# GLOBAL TRENDS

FRAGMENTATION  
COHESION  
& UNCERTAINTY

GAME CHANGERS

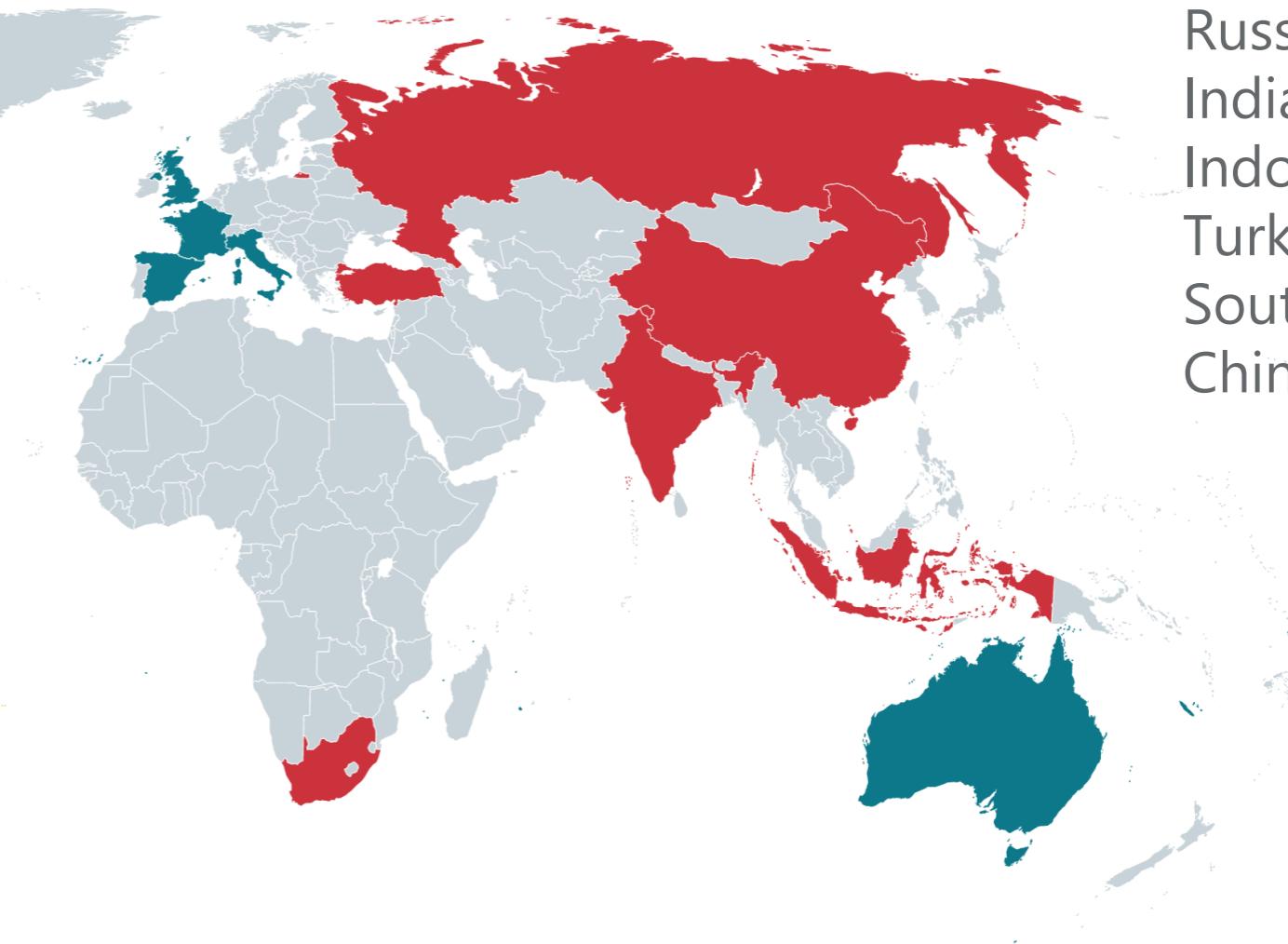
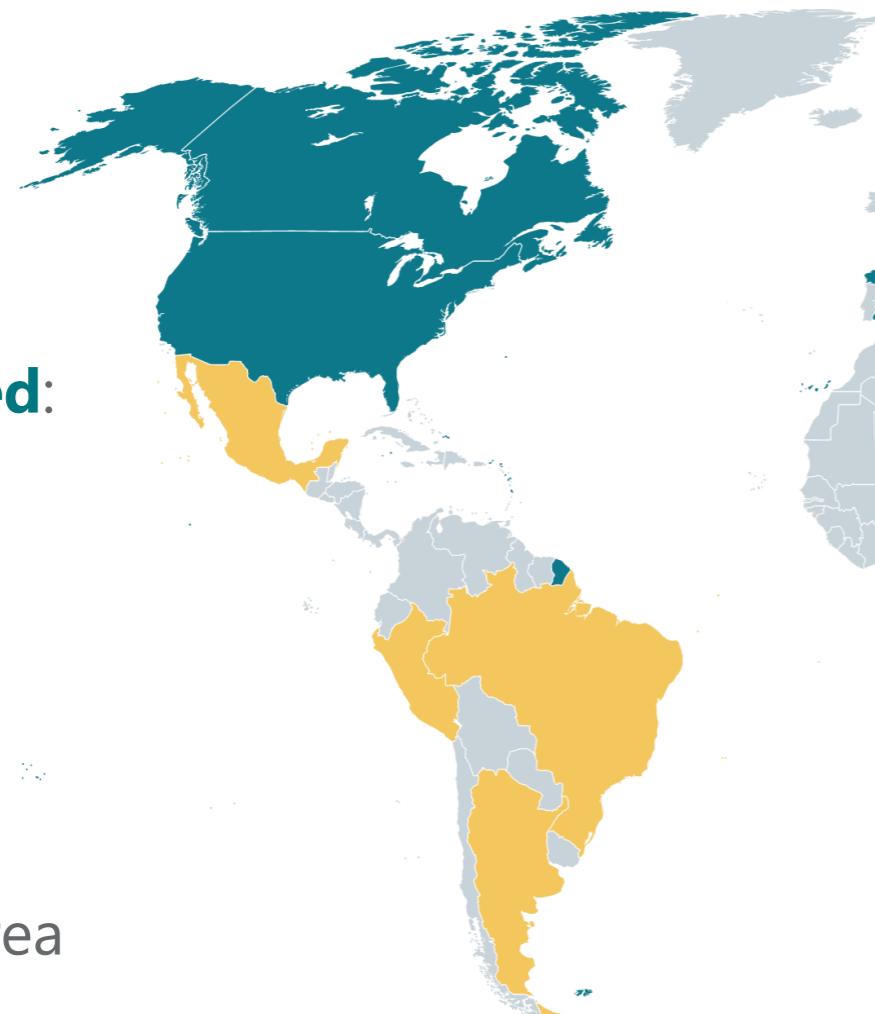


## LatAm:

Argentina  
Brazil,  
Mexico  
Perú

## Developed:

USA  
Canada  
UK  
Europa  
Australia  
Japan  
South Korea



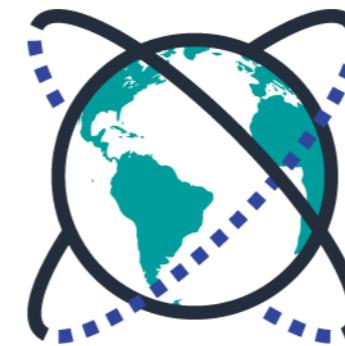
## Others:

Russia  
India  
Indonesia  
Turkey  
South Africa  
China

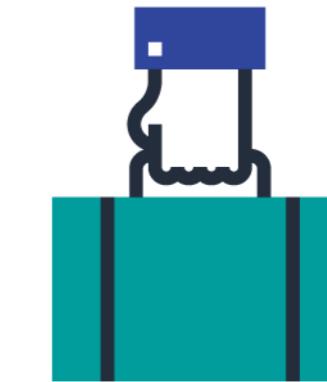
# TRENDS



**Economy & Politics**



**World & Society**



**Work**



**Trust**



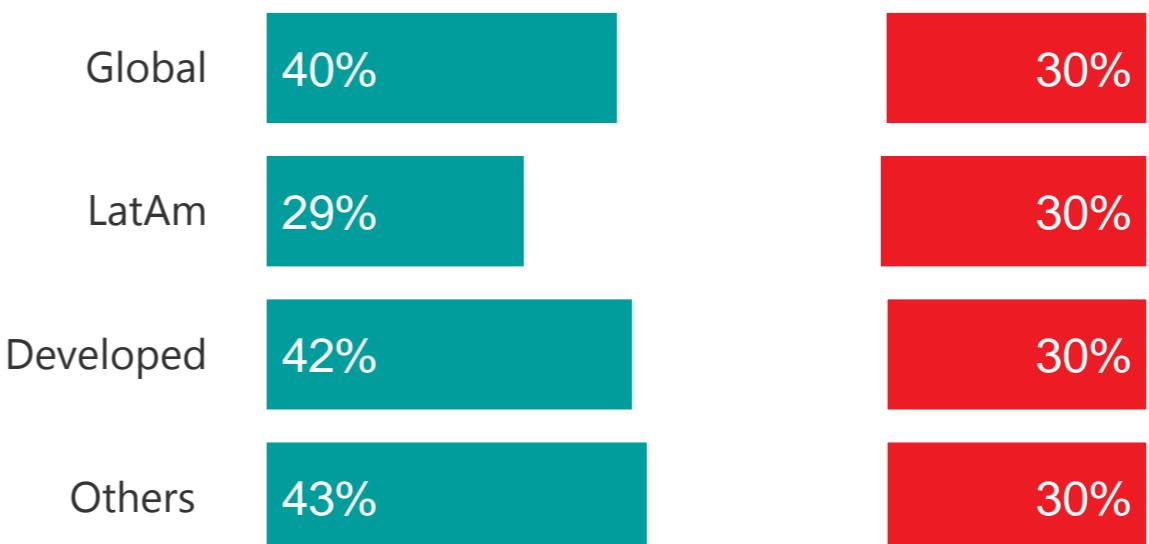
**Future**



# Economy & Politics

# The satisfaction with standard of living is lower in Latin America than in the rest of the world

How satisfied or dissatisfied do you feel about your standard of living at present?



## KEY:

 Satisfied

 Dissatisfied

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

\* Others includes China

GAME CHANGERS



# Latinos are more critical than other emerging societies about the way their governments lead their countries

How satisfied or dissatisfied do you feel about the way the government is running the country?



## KEY:

Satisfied

Dissatisfied

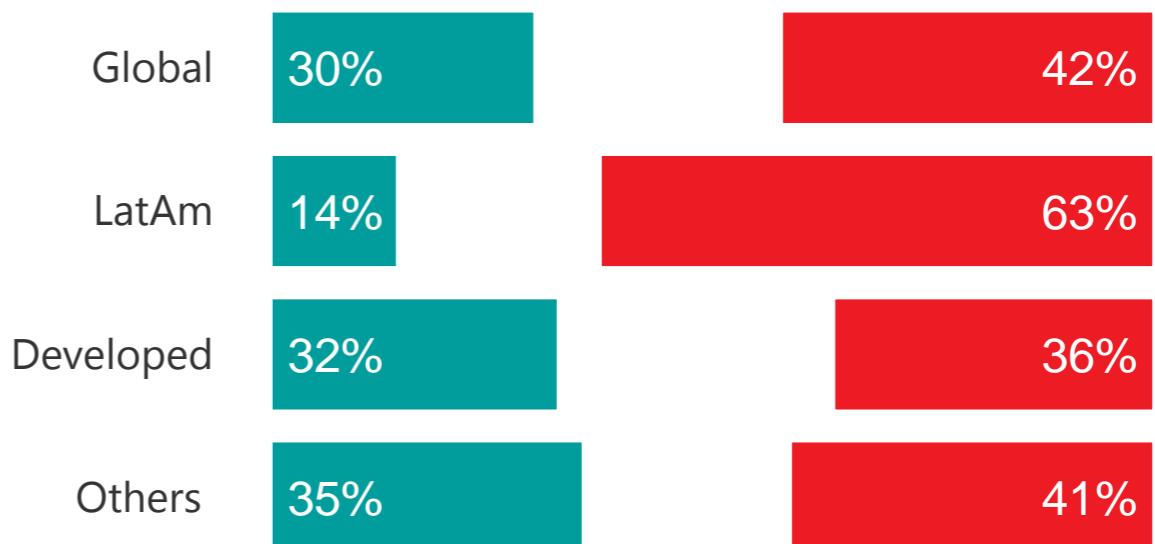
Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS



# Latinos are largely dissatisfied with the quality of their public services

How satisfied or dissatisfied do you feel about local public services (e.g. public transportation, public education, public safety and social services)?



## KEY:

Satisfied

Dissatisfied

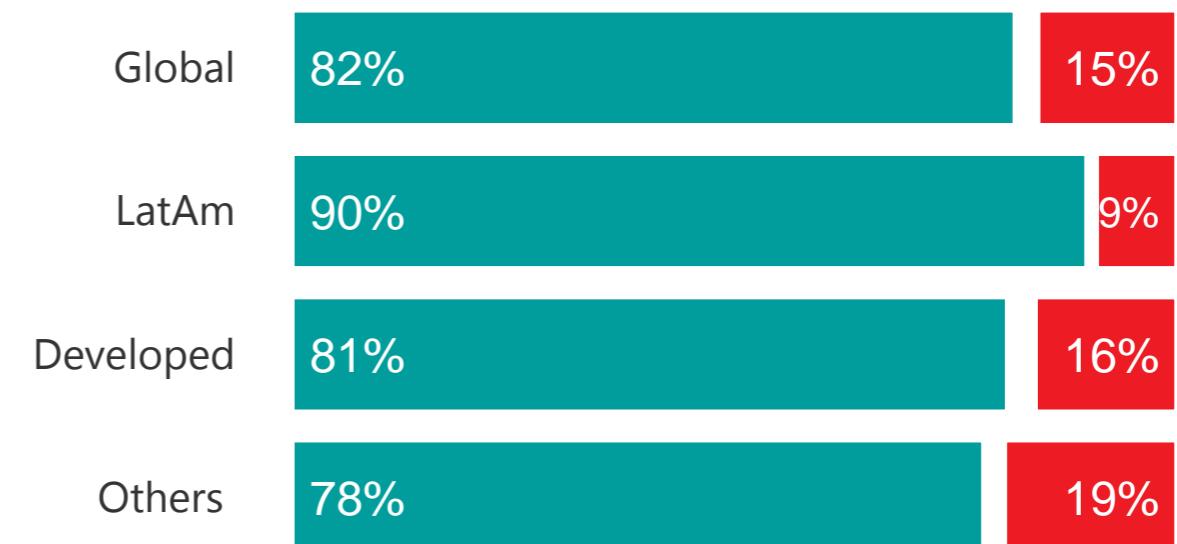
Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS



# The perception of insecurity is higher in Latin America than in the rest of the world, as there is more crime in the region

We live in an increasingly dangerous world



## KEY:

Agree

Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

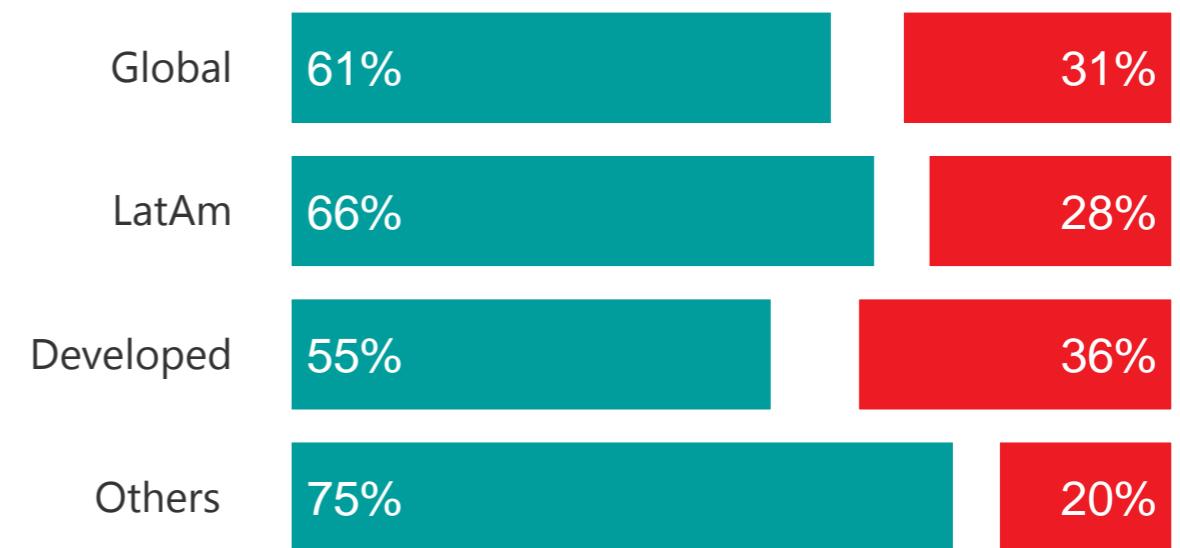
\* Others includes China

GAME CHANGERS



# The support of the death penalty in Latin America is higher than in the developed world but lower than in other emerging countries

I support the death penalty for the most serious crimes



## KEY:

Agree

Disagree

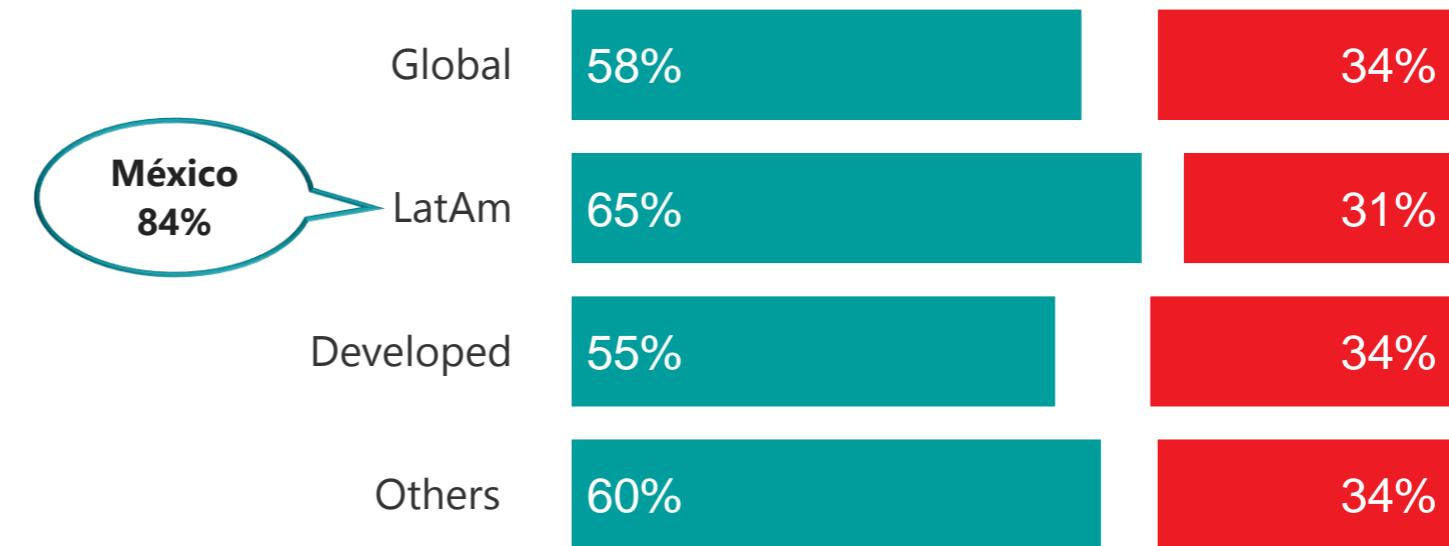
Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS



# Latin America is more inclined to strong leadership than the developed countries and even more than other emerging countries

I wish my country was run by a strong leader instead of the current elected government



## KEY:

 Agree

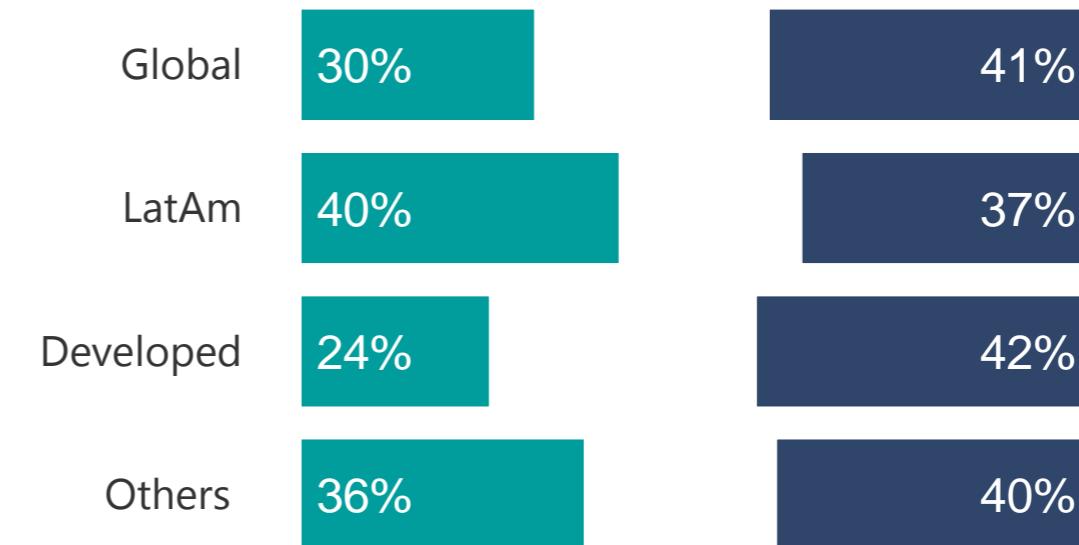
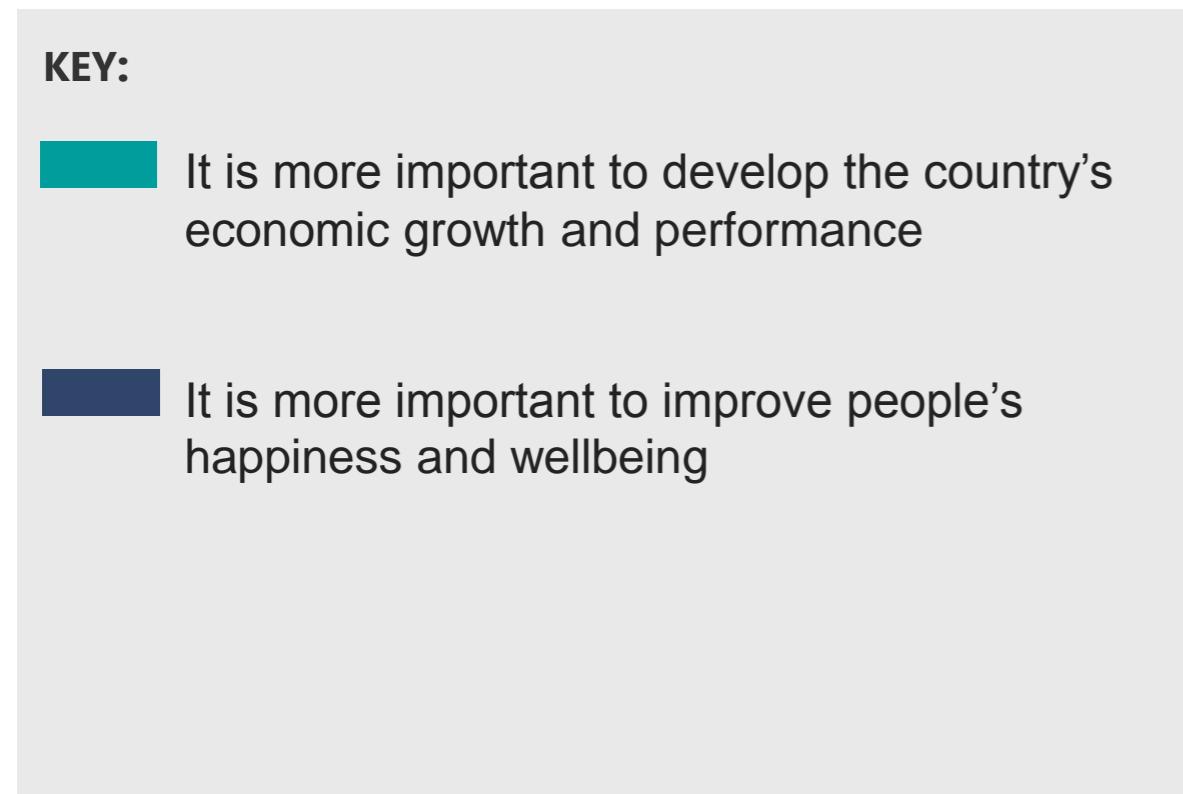
 Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS



# Latin America is found to be more prone to value economic growth over personal happiness than the rest of the world



Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS





# Economy & Political insights

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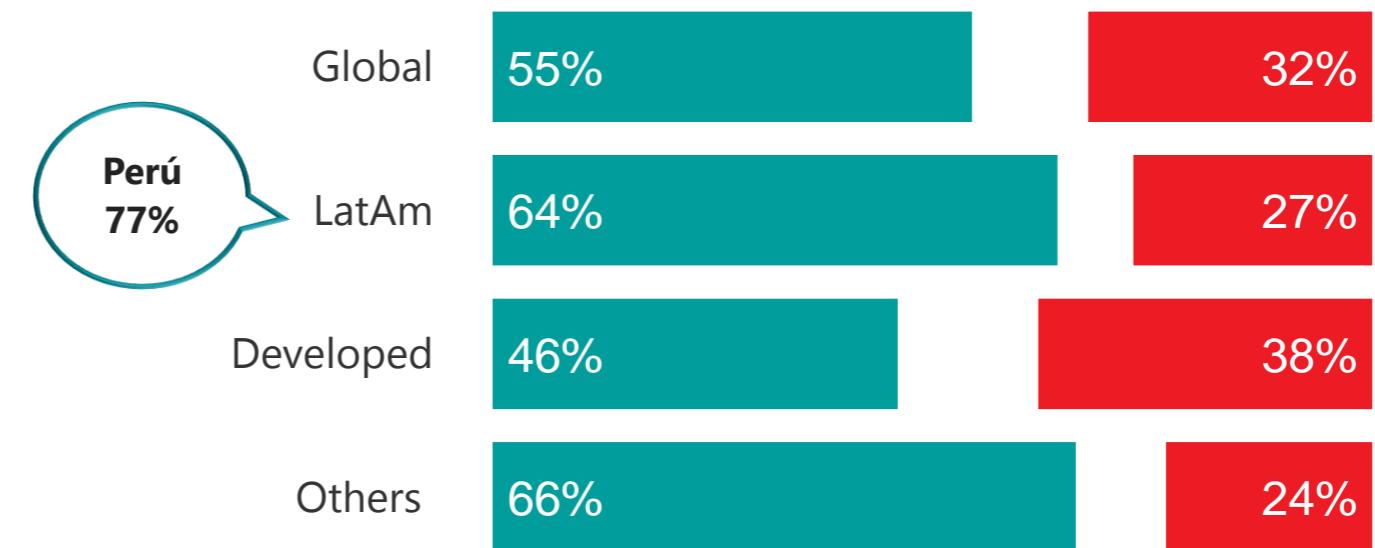
- **Latinos are not satisfied with their standard of living and they are very critical about their governments; due to crime, corruption and the poor quality of public services.**
- **Since crime is one of the reasons of dissatisfaction, many Latinos look for strong leadership.**



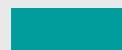
# World and Society

# Globalisation finds more support in Latin America and other emerging countries than in developed societies

Globalisation is good  
for my country



## KEY:

 Agree       Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

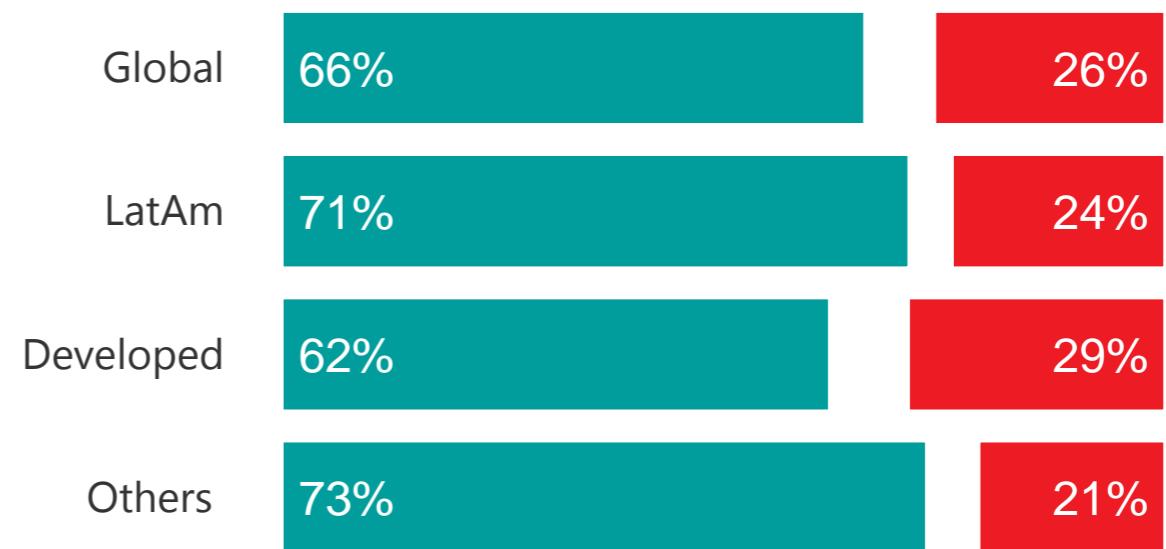
\* Others includes China

GAME CHANGERS

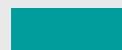


# Emerging countries are more prone to feel they have things in common with other people than in the developed world

People across the world have more things in common than things that make them different



## KEY:

 Agree

 Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

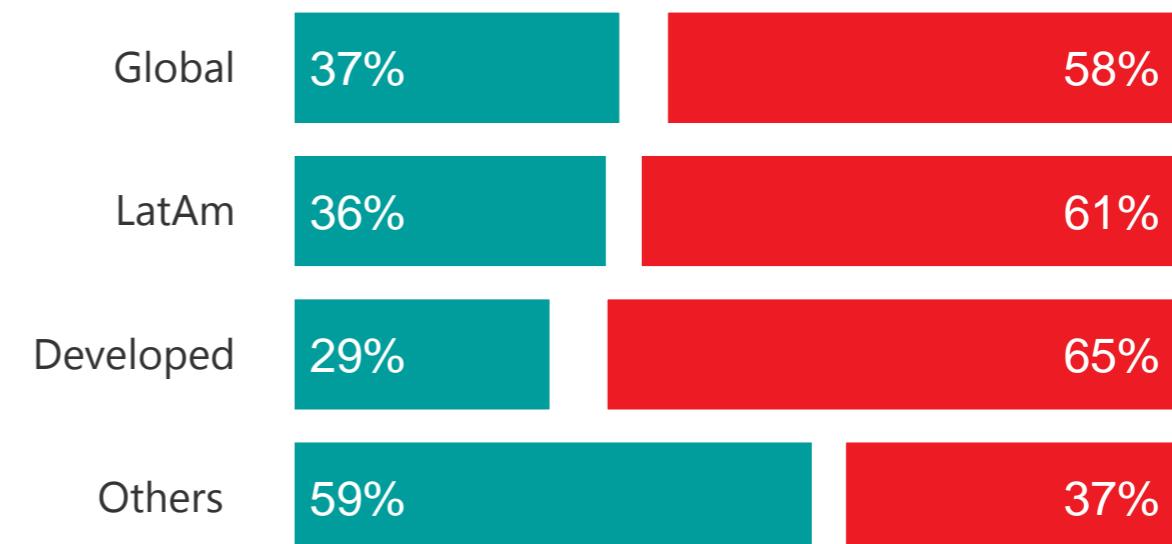
\* Others includes China

GAME CHANGERS



# The emerging countries of the East are more traditional regarding the role of women. Latinos views are closer to those of developed countries.

The role of women in society is to be good mothers and wives



## KEY:

 Agree

 Disagree

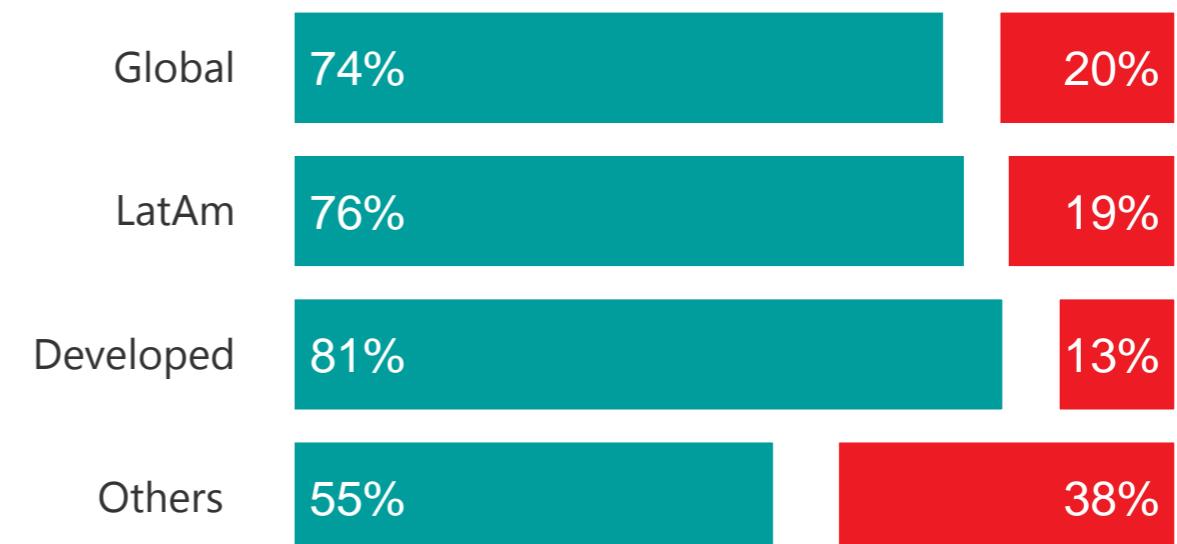
Base Global: 18,180, Latam: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS



# Latin America has similar views on the rights of gay men and lesbians to the developed world

Gay men and lesbians should be free to live their own life as they wish



## KEY:

 Agree

 Disagree

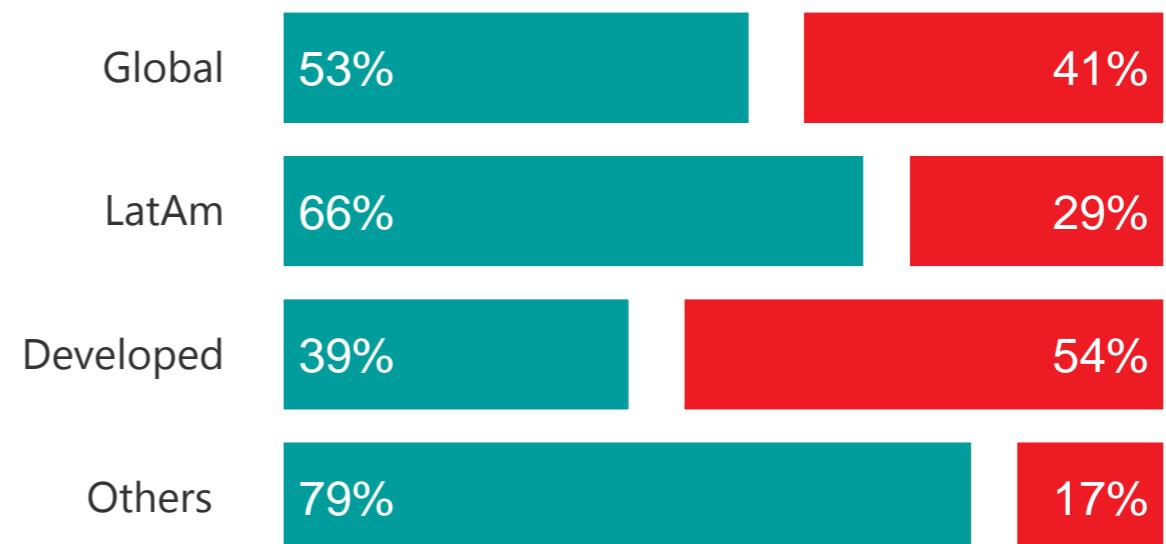
Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS



# Faith is more important in emerging countries than in the developed world

My religion/faith is very important to me



## KEY:

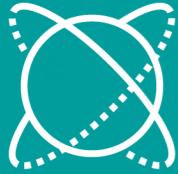
Agree

Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS

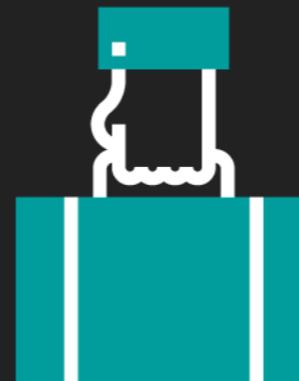




# World and Society insights

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- **Support for globalisation is greater in Latin America and other emerging countries than in the developed world.**
- **In attitudes towards the role of women and the LGBT community, Latinos think more like the developed countries than the emerging countries of the East.**



# Work

# Reaching a prominent position in your career, is more valued in emerging countries than in the developed world

Fulfilment in life is achieving a prominent position in your career



## KEY:

Agree

Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

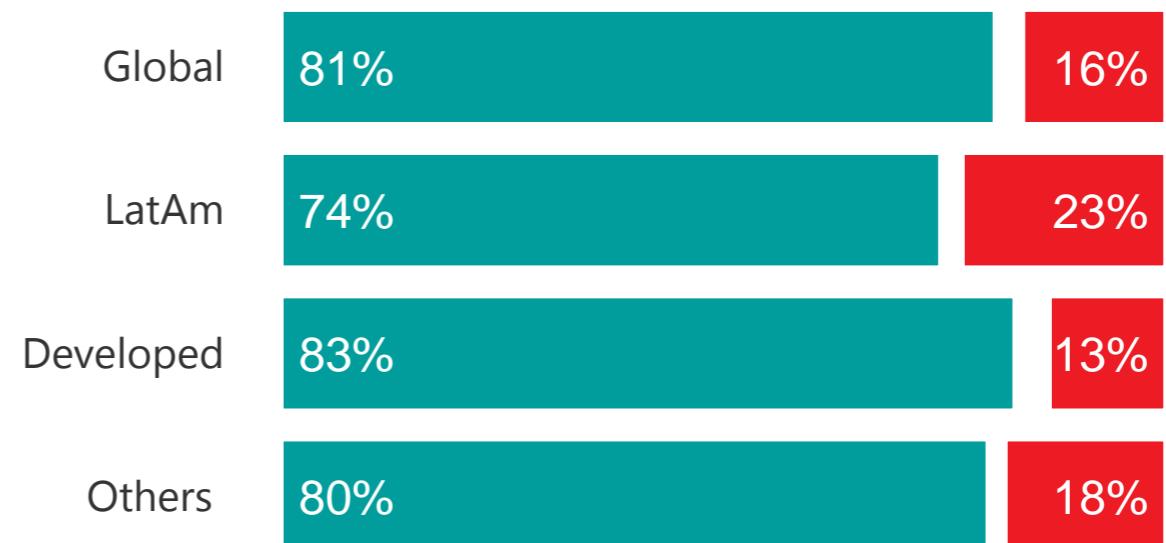
\* Others includes China

GAME CHANGERS

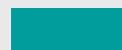


# One out of four Latin Americans would prefer a successful career over a good work-life balance

It is more important to have a good work-life balance than to have a successful career



## KEY:

 Agree

 Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

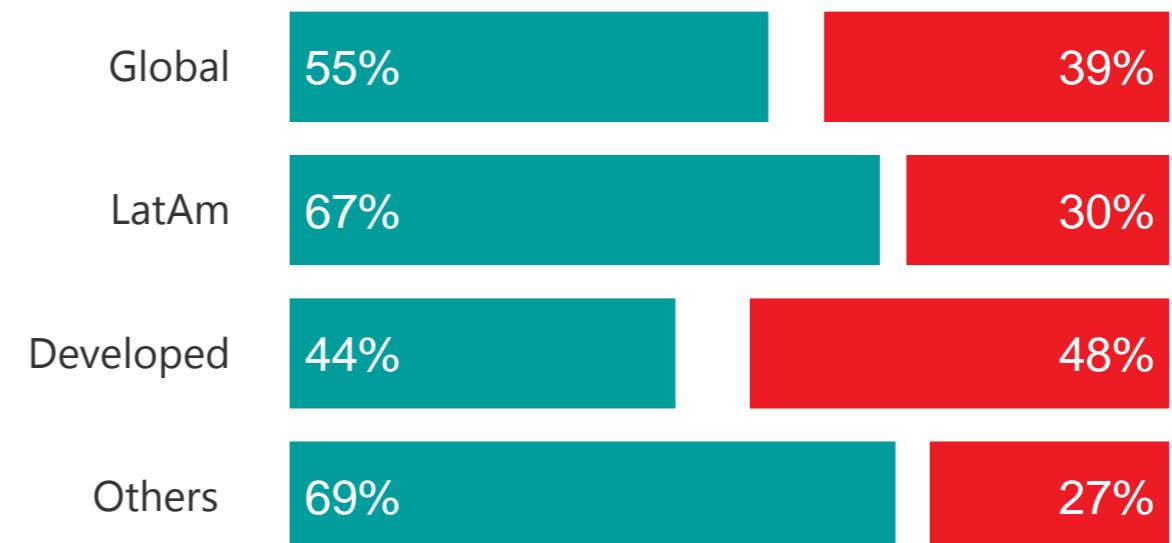
\* Others includes China

GAME CHANGERS



# Two out of three Latin Americans are willing to change their lives in order to achieve personal and professional success

I want to achieve success personally and professionally even if I have to change totally the way I live



## KEY:

 Agree

 Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

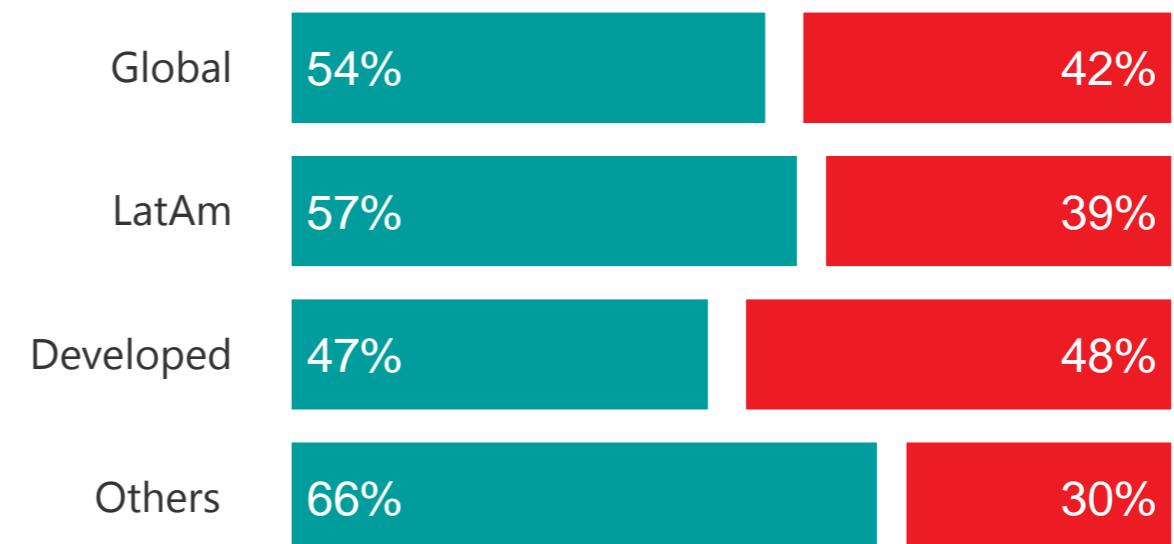
\* Others includes China

GAME CHANGERS



# Most Latinos feel pressured to make money, however to a lesser extent than in other emerging countries

I feel under a lot of pressure to be successful and make money



## KEY:

 Agree

 Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

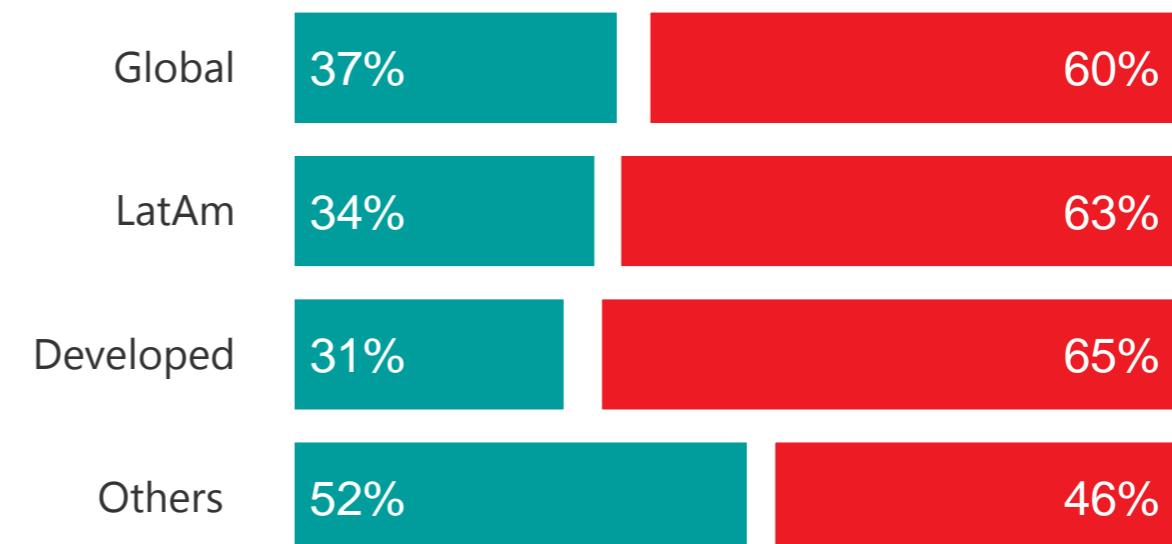
\* Others includes China

GAME CHANGERS



# Unlike other emerging countries, Latinos do not think that success is measured by possessions

I measure my success  
by the things I own



## KEY:

Agree

Disagree

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

\* Others includes china

GAME CHANGERS





## Work insights

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- **Latinos are very hardworking.**  
**They are willing to change their lifestyle or sacrifice their work-life balance to succeed.**
- **However, they are not as materialistic as in other emerging countries.**



# Trust

# Two out of three Latin Americans do not trust their governments. This distrust is higher than in other parts of the world.

To what extent, do you trust in: your national government?



## KEY:

Trust

No trust

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

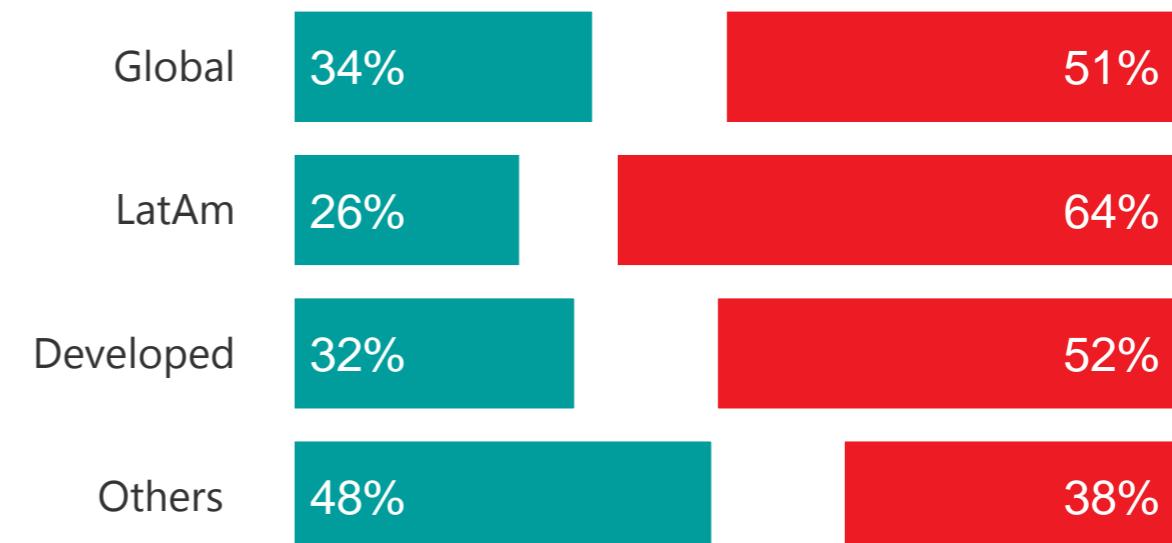
\* Others includes China

GAME CHANGERS



# Only one out of four Latinos trust that their government uses their personal data in the right way

To what extent, do you trust the following to use the information they have about you in the right way: your national government?



## KEY:

Trust

No trust

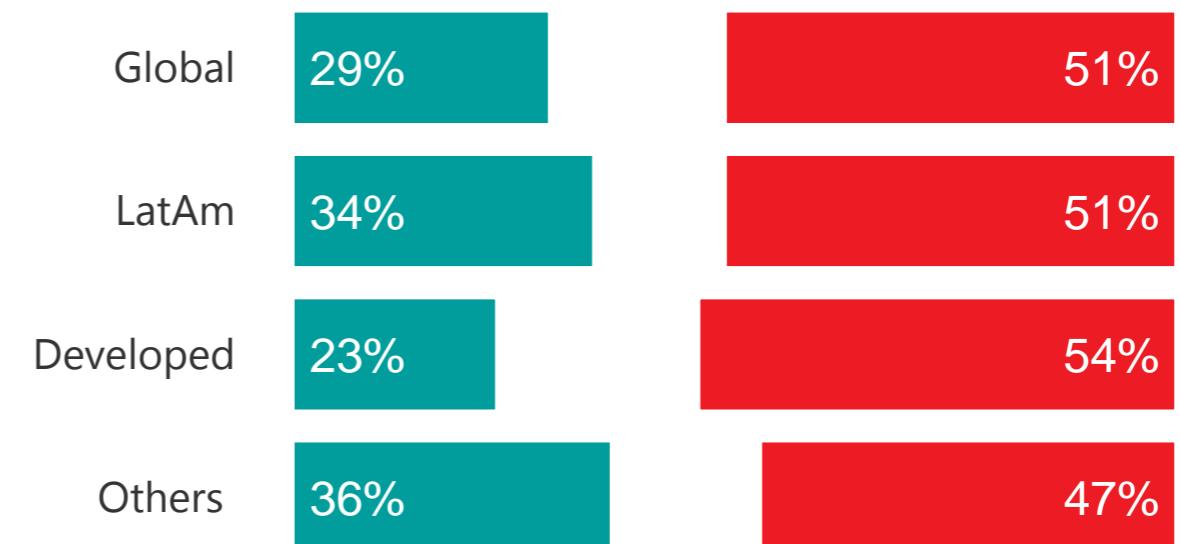
Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS



# Latin Americans and other emerging countries are slightly more trusting of foreign governments than the developed world

To what extent, do you trust in foreign governments?



## KEY:

Trust

No trust

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

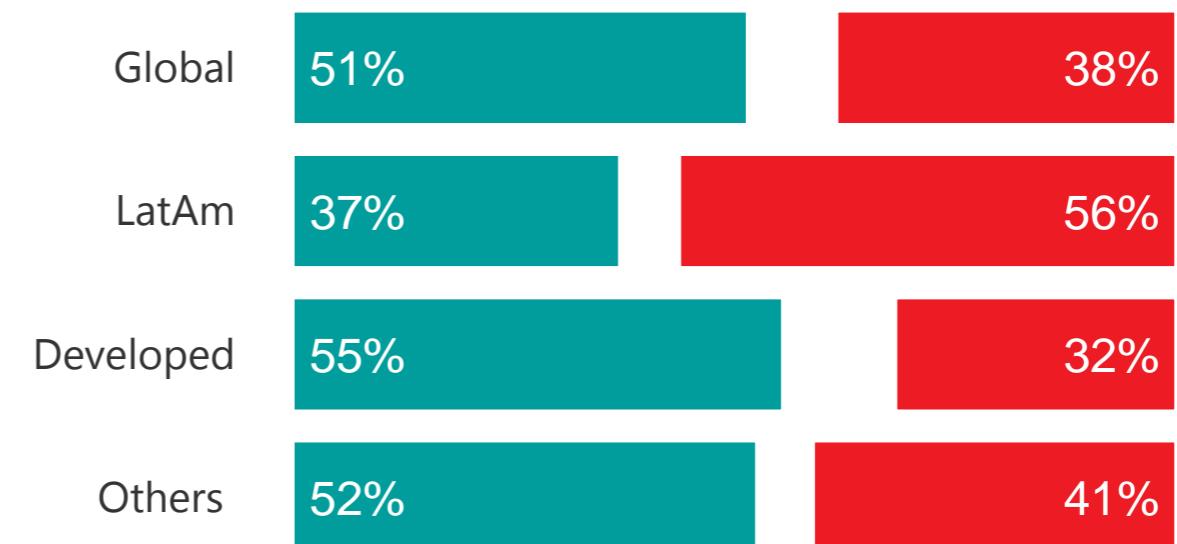
\* Others includes China

GAME CHANGERS



# Latinos do not trust the public sector health providers (or other public services)

To what extent, do you trust in public sector healthcare providers?



## KEY:

 Trust

 No trust

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

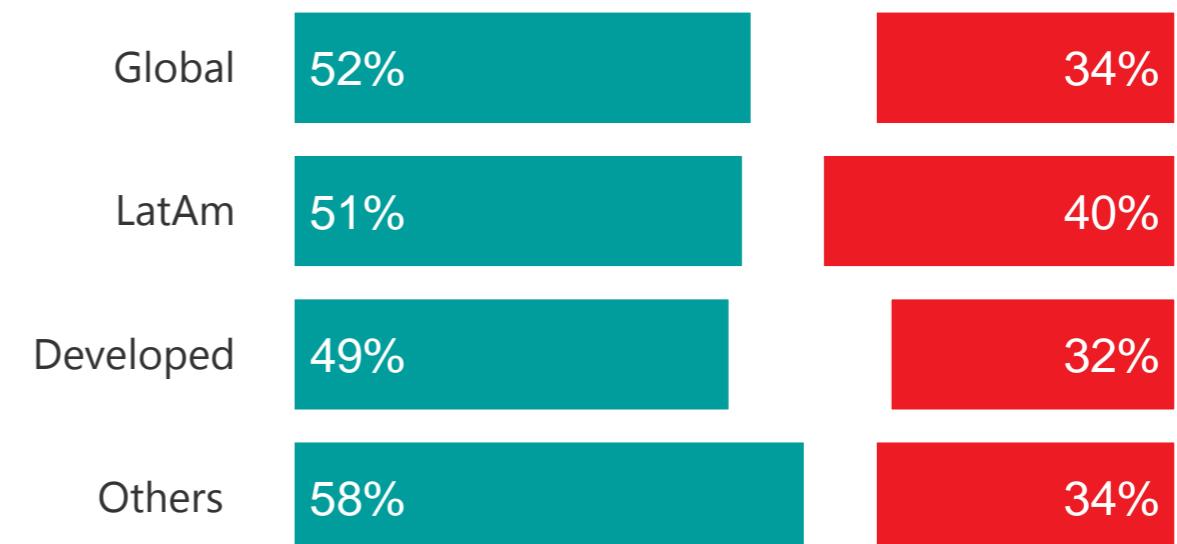
\* Others includes China

GAME CHANGERS



# Latinos are more trusting of the private than the public health services (they might be expensive, but the quality is superior)

To what extent, do you trust in private sector healthcare providers?



## KEY:

 Trust

 No trust

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

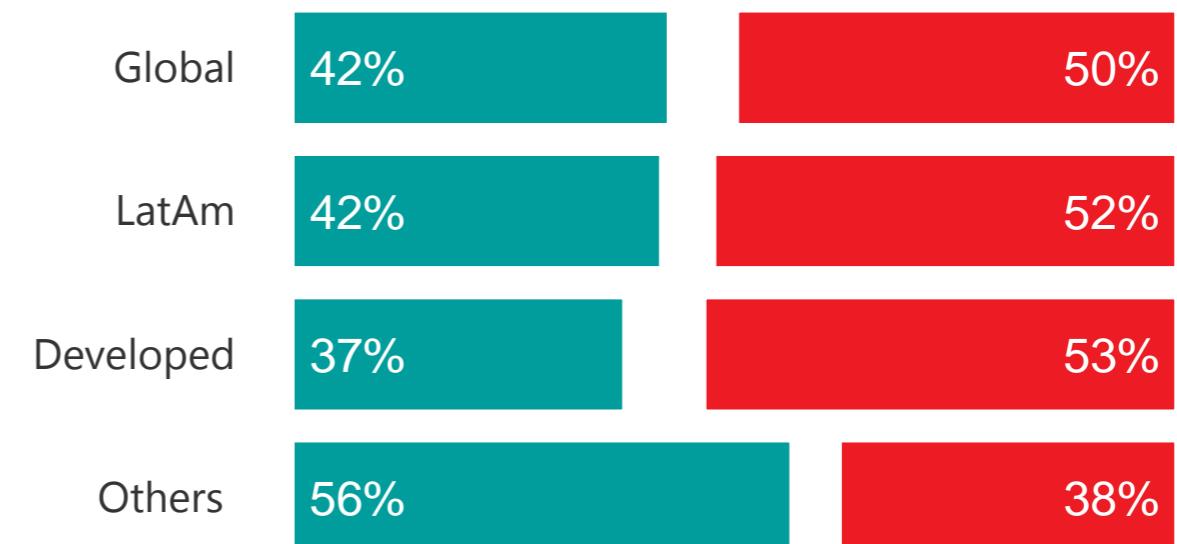
\* Others includes China

GAME CHANGERS



# Trust in business in Latin America is slightly higher than in the developed world, but lower than in other emerging societies

I have a high level of trust  
in businesses in general



## KEY:

Agree

Disagree

Base Global: 18,180, Latam: 2,564, Developed: 11,093, Others: 3,523

GAME CHANGERS





## Trust insights

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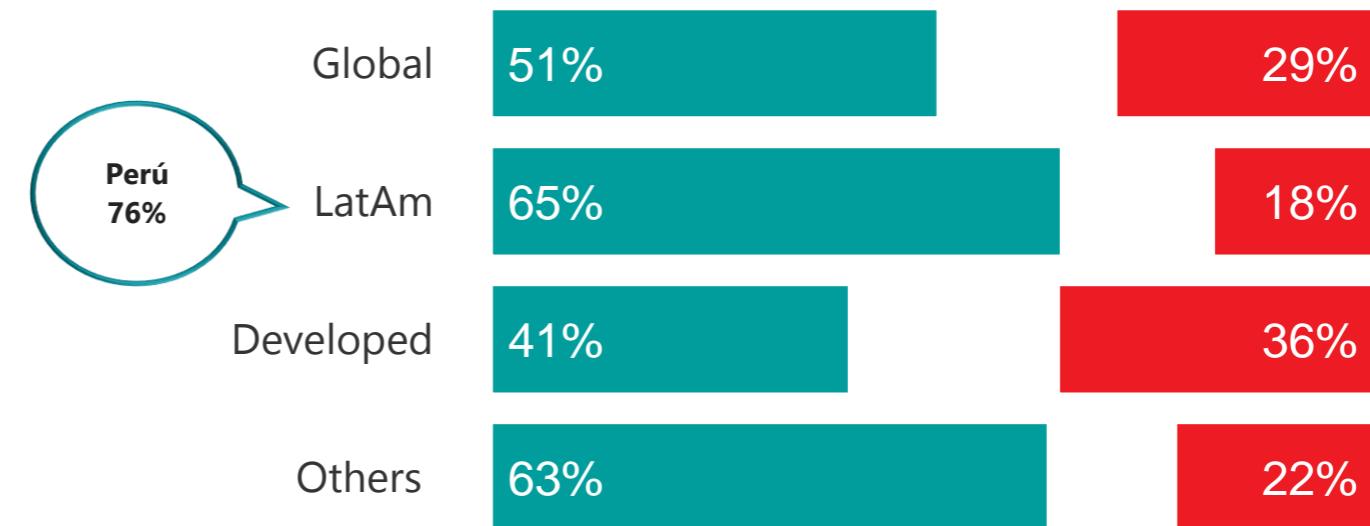
- **Latinos have great distrust of their governments and public services.**
- **Confidence in the private sector is somewhat greater, but without reaching the levels of confidence in other emerging countries.**



# Future

# In emerging countries, the majority feel that they will have had a better life than their parents

To what extent, if at all, do you feel that you will have had a better or worse life than your parents' generation, or will it be about the same?



## KEY:

Better

Worse

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

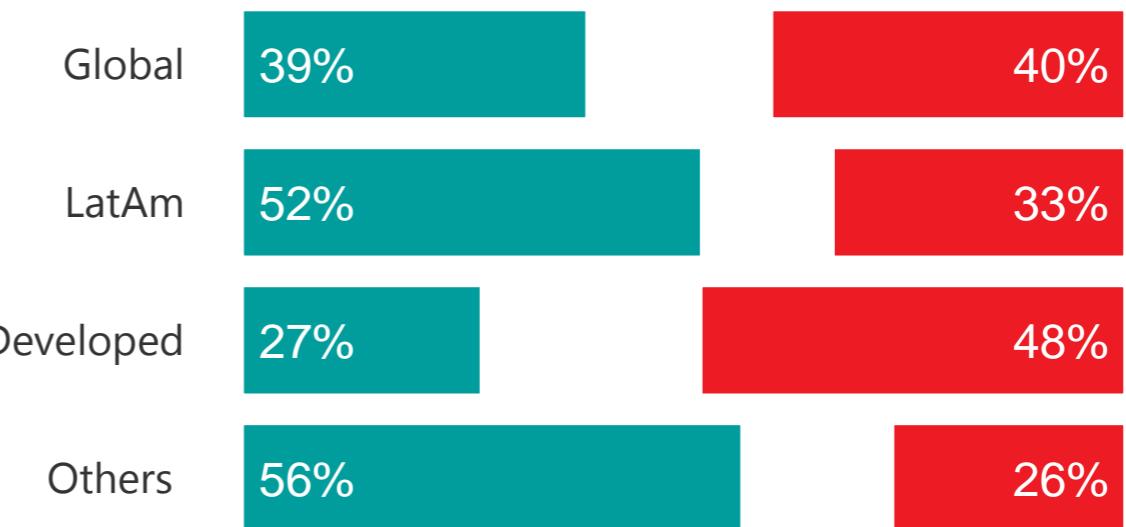
\* Others includes China

GAME CHANGERS



# In emerging countries, the majority feel that today's youth will have a better life than their parents

To what extent, if at all, do you feel that today's youth will have had a better or worse life than their parents, or will it be about the same?



## KEY:

Better

Worse

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

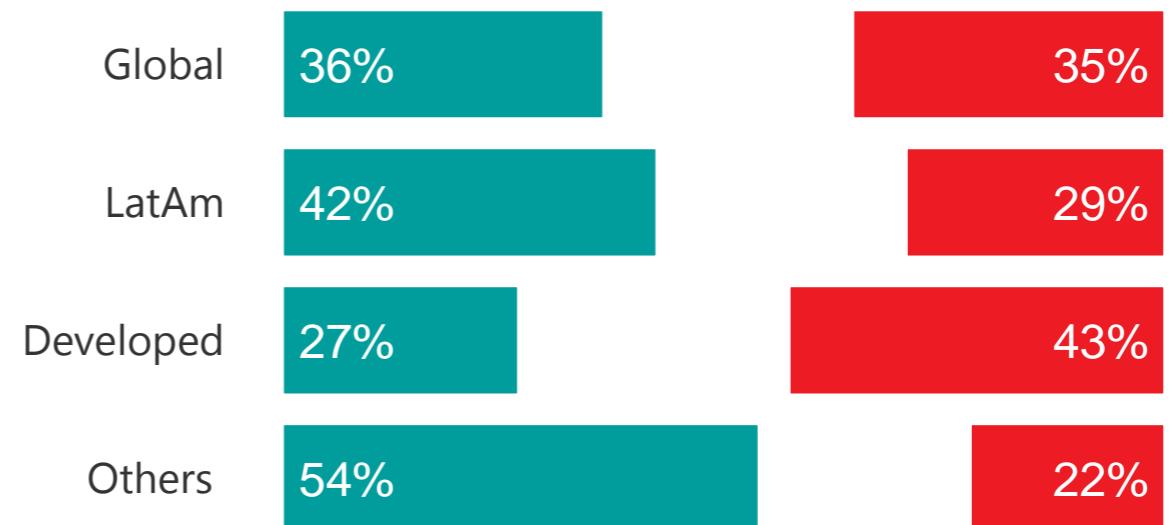
\* Others includes China

GAME CHANGERS



# Latinos are more optimistic than the developed countries, yet less optimistic than other emerging countries

Looking ahead to the next 12 months, are you optimistic or pessimistic about your country?



## KEY:

Optimistic

Pessimistic

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

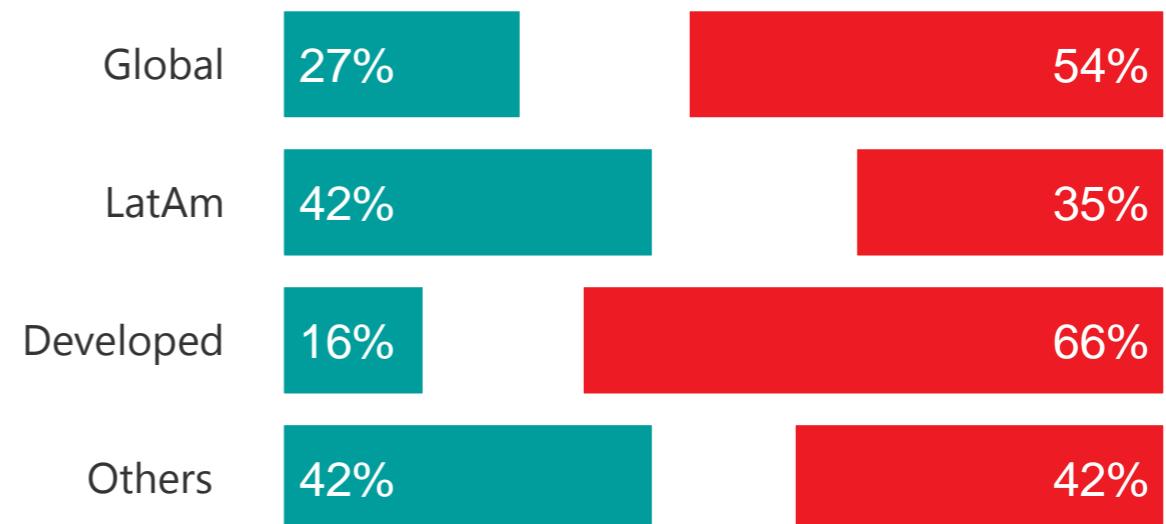
\* Others includes China

GAME CHANGERS



# Latinos and other emergent societies perceive that they have more opportunities than their parents to find a job

Which of these do you think is or will be better or worse for you than for your parents' generation?  
Having a secure job



## KEY:

Better

Worse

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

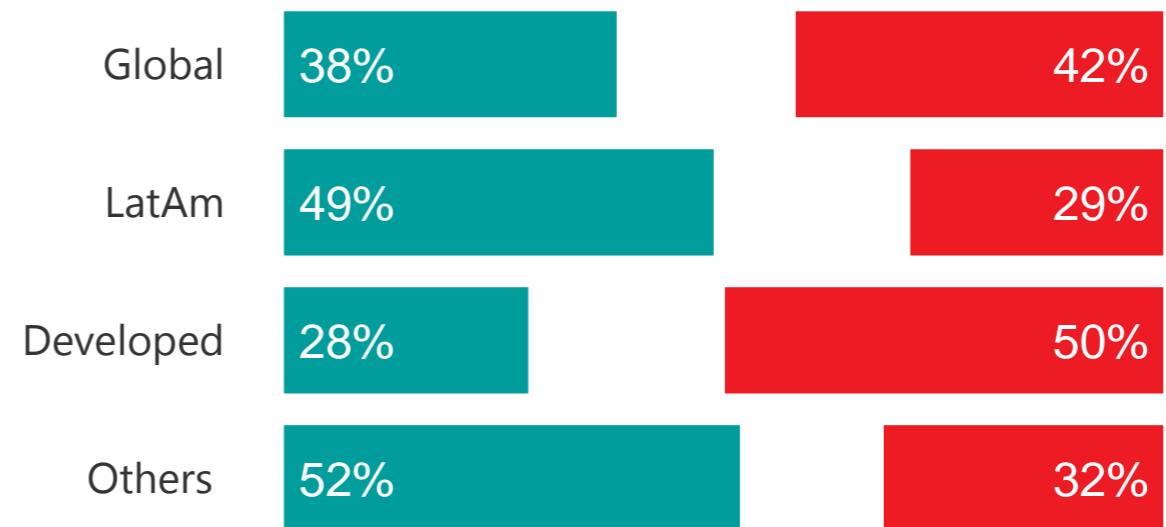
\* Others includes China

GAME CHANGERS



# Latinos and other emergent societies perceive that they have more opportunities than their parents to have money

Which of these do you think is or will be better or worse for you than for your parents' generation?  
Having enough money to live well



## KEY:

Better

Worse

Base Global: 18,180, LatAm: 2,564, Developed: 11,093, Others: 4,523

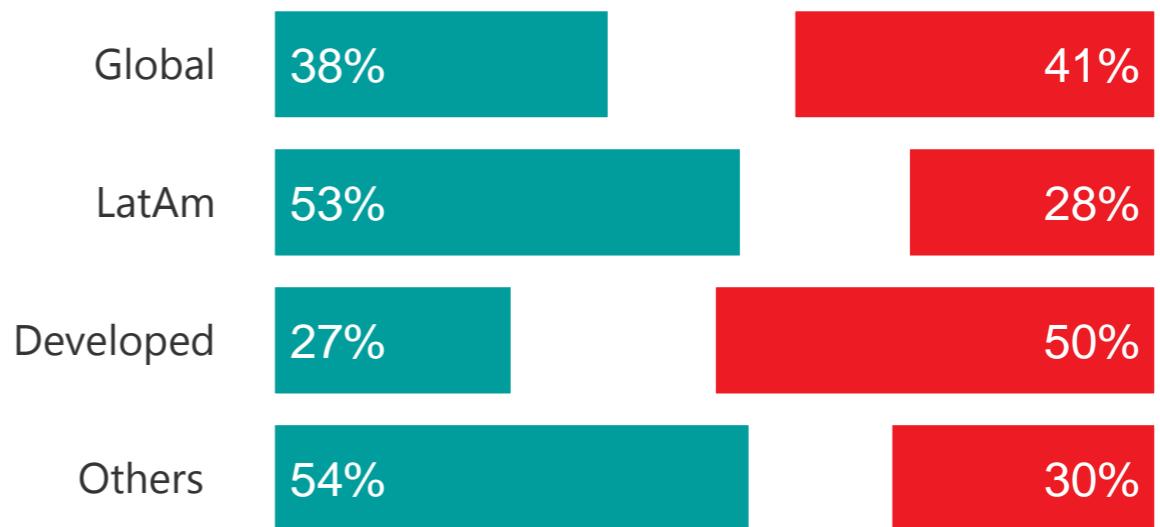
\* Others includes China

GAME CHANGERS

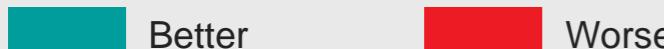


# In Latin America, as in other emerging countries, it is easier to own a house today than for the previous generation

Which of these do you think is or will be better or worse for you than for your parents' generation?  
Being able to own your own home



## KEY:



Base Global: 18,180, LatAm: 2564, Developed: 11,093, Others: 4,523

\* Others includes China

GAME CHANGERS





## Future insights

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- **Latinos feel progress. They consider that they live better than their parents and that young people will have a better life.**
- **In particular, they perceive that they have more opportunities to find work, earn money or have a home of their own.**



# Latinos, in line with western culture

---

Latinos share the following views with the developed societies:

- A modern view regarding the role of women and the rights of the LGBT community.
- A distrust in their governments and their business community
- They believe that success is not measured by possessions



# Latinos, as developing countries

---

Latinos share the following views with other emerging societies:

- A belief that globalisation is good for their countries
- A feeling that they have a better life than their parents
- A confidence that they will have a better future



# Latinos, are more unique

---

Latinos are more unique in that:

- They are less satisfied with public services
- They are more worried about crime
- They are more willing to support strong leaders



# Latinos, a final profile:

In line with **western culture**, they share the following views with developed societies:

- A modern view regarding the role of woman and the rights of the LGBT community.
- A distrust in their governments and their business community
- They believe that success is not measured by possessions

As **developing countries**, they share the following views with other emerging societies:

- A belief that globalisation is good for their countries
- A feeling that they have a better life than their parents
- A confidence that they will have a better future

But, Latinos are more **unique** in that:

- They are less satisfied with public services
- They are more worried about crime
- They are more willing to support strong leaders



# GLOBAL TRENDS

FRAGMENTATION  
COHESION  
& UNCERTAINTY

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#IPSOSTRENDS

THANK  
YOU

GAME CHANGERS

