

BRAZIL 2020: WATERCOLOUR OR MOSAIC?



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Ipsos Editions

October 2019

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IPSOS FLAIR: UNDERSTAND TO FORESEE



Henri Wallard,
Deputy CEO

In its 6th edition in Brazil, Ipsos Flair continues to deepen its research in a country whose image is less and less light and fanciful. In a few years, the succession of crises of all kinds has profoundly changed perceptions and mentalities. Who are they in this context? The succession of crises?

To deal with their issues and offer them innovative and comprehensive solutions, Ipsos' uniqueness is its multi-specialist organization and services lines' range. By bringing together these complementary perspectives, the Ipsos Flair series helps our clients to formulate and to fine tune their strategic planning approaches.

Launched globally in 2006, the Ipsos Flair series analyzes the values, behaviors and transformations of individuals, and how these three pillars impact society and the way we relate to brands, businesses, the media and governments. In addition to Brazil, Flair is developed in China, Colombia, South Korea, France, India, Indonesia, Italy, Mexico, Peru, Russia, Thailand and Ivory Coast.

Flair is about instinct and intuition, ability to capture the atmosphere of a country, to perceive the right direction, to know when to act. It is also another way of looking at things. Considering the surveys' results as sociological symptoms to understand the real relationship between people and everything around them.

Against stereotypes, Flair affirms Ipsos' intellectual leadership, freedom of spirit and the competence of its experts from:

- Analysis of motivations and expectations of consumers-citizens (perceptions, confidence, frustrations...)
- Exploring key topics (aging, emancipation of women, environment, purchasing power, new attitudes, impact of digital...)
- A selection of successes and examples for strategists.

Since the inauguration of President Bolsonaro in January 2019, Brazil is frequently in the spotlight. It is sometimes difficult to identify the future direction of the country, between ultra-nationalism, protectionism, puritanism, environmental damage, increased wages and social changes. Inside the country things don't seem any more clear: 59% of Brazilians think that the country goes into the wrong track, 46% worry about healthcare and education is one of the main concerns (36%).

All this implies to see more clearly and we hope that this new Flair will help you there.

Enjoy your reading!

EDITORIAL



Yves Bardon,

Ipsos Flair Program Director – Ipsos Knowledge Centre

Regarded as one of the founders of Bossa Nova, Joao Gilberto, who died in June 2019, is known as the performer of A Garota de Ipanema, known globally as The Girl from Ipanema.

Written in 1962, the song was inspired by Helô Pinheiro: this young lady (she was seventeen at the time) who spent every day in front of a bar, fascinating two regulars, Antônio Carlos Jobim and Vinícius de Moraes, the music's composer and the author of the lyrics.

It was easy to transform Helô Pinheiro into a muse, a poetic and sensual image, a pure fantasy. It is still Helô who influences us when we think of Brazil, almost sixty years after the creation of the song.

[...] AND WHEN SHE PASSES,
I SMILE BUT SHE DOESN'T SEE
SHE JUST DOESN'T SEE,
NO SHE DOESN'T SEE

What is remaining of the Brazilian muse? At first, nothing.

Each of the Ipsos Flairs that we have written for the last six years seems to have kept us away from her, as if there was no trace of her foot in the sand, neither her figure nor her lightness.

If “football” remains the first topic on the internet when we search “Brazil”, others are bursting, but much less exciting.

With “corruption”, “clandestine cemetery”, “deforestation*”, “call for a general strike”, “protests against pension reform”, “child labour”, “money laundering”, “drastic reduction of university subsidies”, “Growth forecasts constantly revised downward”, “Real’s decline”, “stagnation”, “risk of recession”. All aspects of society are concerned: security, justice, education, health, etc., but none is as encouraging as the arrival of President Bolsonaro in power which rise to hope for an economic recovery. Today, polarization, divergences and divisions seem to best define the mood of Brazil.

Should we be fascinated by this dark image?

No, of course, and it is not by chance that our first paper is devoted to optimism.

In parallel with this difficult national situation, society affirms profound changes, in particular the demand for greater diversity, all the personal preferences, all the possible choices of life. This is the sign of a society that is becoming more and more individualized, where the person is King / Queen, where brands must address each individual in his personal values and tastes, remembering that “the best of Brazil, it’s the Brazilians.”

Other changes are possible; for instance, the signing of the free trade agreement between the European Union and Mercosur committing Brazil to ban illegal deforestation in 2030 and to replant 12 million hectares of trees.

In this complex Brazil, it is important to find meanings and sense, links, interpersonal relationships, commitment. It is key so that people do not feel abandoned or alone but can talk to each other, and also with brands and all actors of the society. To spot the fears and concerns of Brazilians (politics, privacy, technologies, changes...), to note personal energy and potentials, and to nod the demand for spirituality, inextricably nested within Brazilian soul, that is important as well to act smarter.

* According to data from the Brazilian Space Agency, Amazon deforestation in Brazil increased by 88.4% in June 2019 compared to June 2018, with 4,565 km² of forest: this is the equivalent of a football stadium that disappears every minute.

This is why we entitled this edition, “Watercolour or Mosaic?”, in reference to another classic gem from Brazilian songbook, Aquarela do Brasil (Watercolour of Brazil, also known as simply “Brazil” in the English language version).

The song, which exalts the qualities and greatness of Brazil, has ufanist lyrics. It symbolizes another time in the country, but also resembles the tone adopted by the new federal Government.

As a painting process made of water, paint and light strikes of the brush, the watercolour is light and fast. It's a moment of grace and fluidity.

The mosaic, instead, is built by thousands small and strong coloured stones. It involves geometry and requires time to be made. Although equally artistic, it can give the impression of fragmentation.

“Watercolour or Mosaic?” reflects two situations of Brazilian society: united and disjoined, from a nation together to a kaleidoscope of individualities.

POINT OF VIEW



Marcos Calliari,
Ipsos Brazil CEO

Last year's Ipsos Flair Brazil, we introduced the edition in order to show the state of mind of Brazil: "And here we are numb. And we haven't hit the rock bottom yet. The perspective on improvement of the local economic situation keeps falling. We're numb, few things surprise us. And life goes on..."

In this desolate context, increased by inclement political constraints, and disappointing economic results, we faced a polarizing and historical election. However, we showed that the sound of the routine of life, of the modernising movements, of the dedication of the workers, of the creativity, of the manifestations - to which side they were - supplanted the noise of the financial market, the indices of approval and the scandal of the day. Life has to go on.

It is not surprising, therefore, that 2019 began with a high level of optimism and consumer confidence. After years of political and economic turbulence, the prospect of a new administration brought hope and high expectations. The Primary Consumer Index Ipsos/Reuters rose from 42,7 (September 2018, pre-election) to 54,9 (January 2019), on scale from 0 to 100, reaching positive levels (above 50) for the first time since 2013. This improvement was also supported by an unprecedented renovation in the legislative body (only 15% of the Senators kept their jobs) and as well as new political practices more aligned with the new times was in the Government's agenda.

However, the beginning of the year proved much more challenging. Legislative difficulties, lack of an economic spark and many adjustments in the executive

have marked the learning of the new Government. Once again, the harsh reality pushes down the expectations of better indicators.

To say that we are back to where we were, however, seems to be unjustified. We are in a temporal limbo, in which there has been a break from the state of the past, but not yet reaching a new model in which Brazilian society can bet its chips. We're living the future of yesterday.

And there are several social signs that many pages have been turned. Outdated opinions, such as sexist or homophobic comments, are not tolerated in the way they once were. Even with a conservative party in power, there is no way back on these social agendas. Although there are ideological divergences among Brazilians, some steps are given in the directions where there is consensus. And our assessment is that many social changes have come to stay, regardless of the short-term noises, or the ideological current in power.

I heard somewhere that bamboo grows in bursts. The sprout takes time to start the growing process (apparently, waiting for all conditions to be favourable and sufficient), but when it does, it grows at the highest speed within all other living forms. It is a metaphor often used to manage issues in several areas, such as talent development, strategic planning or resource allocation.

Recent years have been characterized by the proliferation of events, trends and new possibilities – and Brazil is a clear reflection of these factors. Tech unicorns, new models of working, the rapid rise of co-working, pressure on corporate responsibility, are some of the signs. They grow, expand and permanently change our society. Often slow, but inexorably.

Analysing the generational-historical context, there is no way of not noticing that millennials are becoming more influential in society. They are taking assault on all institutions, many of which are still trying to resist the inevitable change. Now, the growth outbreak of bamboo begins. Moral of the story is: it is a consolidation of trends and social-technological possibilities that has never seen before.

The Government, economic cycles and champions of Brazil's Soccer League will change, as it should. Nevertheless, Brazilian society is heading to a future that insists on presenting itself as chaotic, but still representative and strong. As it also should be.



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A photograph of a green wooden boat on a calm river, with dense green trees on the banks and a blue sky with clouds reflected in the water. A quote is overlaid in the top right corner.

“IN THE END, WHAT
WE MISS THE MOST FROM
THE PAST IS ITS FUTURE.”

LUIS FERNANDO VERÍSSIMO

USER GUIDE



IS GOD STILL BRAZILIAN?



Tania Cerqueira,
Innovation



Ricardo Crestani,
Ipsos UU

In the dictionary, innovation is described as a creative and transformative process that promotes paradigmatic rupture, even if partial, positively impacting the quality of life and human development.

Having this concept of rupture and transformation in mind, a question has become an important point of discussion now: Why is innovation a challenge nowadays?

Since the early 2000s, the industry, in general, has redefined the concept of innovation. Just being creative was no longer enough. Efficiency is now the motto of the industry: more with less, prioritizing the effectiveness of the processes. With increasingly smaller budgets, coupled with increasingly complex demands, the challenge for marketers has been intensified.

This new definition of innovation has transformed business and the market, taking professionals from creative industries out of their “comfort zone”. Therefore, these new professionals need to have two key features to innovate today: **empathy** and **resilience**.

EMPATHY AND RESILIENCE

Widely used in TV shows, self-help books and corporate lectures, both terms are part of linguistic fad – which also include assertiveness and proactivity – and strongly impact the way we communicate and innovate today.

Let's go back to the concepts of empathy and resilience. Today, both themes have been reinvented, with current uses far away from their original definitions.

The concept of resilience has its origins in physics, and can be defined, according to the dictionary, as the “property possessed by a body to return to its original form after it has undergone an elastic deformation”. However, it was its use in psychology that made the word part of our vocabulary. For psychologists, resilience is the ability of an individual to cope with their issues, to adapt to changes, to overcome obstacles or to resist pressure from adverse situations – shock, stress, some kind of traumatic event – without suffering a breakdown, emotional or physical, by finding strategic solutions to confront and overcome adversity.

Also based on psychology, the empathy definition involves three components: affective, cognitive and regulators of emotions. The affective component is based on the sharing and understanding of the emotional states of others. The cognitive component refers to the ability to deliberate on other people's mental states. The regulation of emotions deals with the degree of empathic responses. In other words, it is the affective and cognitive exercise of seeking to interact perceiving the situation being lived by another person (in the first person singular). However, the origin of the term lies in philosophy: in order to appoint the ability of a spectator to project himself in the work or object with which he interacts. Our body is biologically programmed to be empathic – that is, we have neural structures that enable us to “feel something” that does not necessarily reach us directly.

Given the events of recent months in Brazil, it is easy to understand why empathy and resilience stand out: 2018 was a difficult year for Brazilians, marked by a country essentially divided and polarized. A young democracy that is still fragile, with a very debilitated economy that shows no signs of real improvement in the short term. The lack of trust in political institutions leads to disbelief throughout the system as we know it. Corruption appears in a wide-open manner, leading the population to participate more in debates, protests and social movements.

SOCIAL CONTEXT

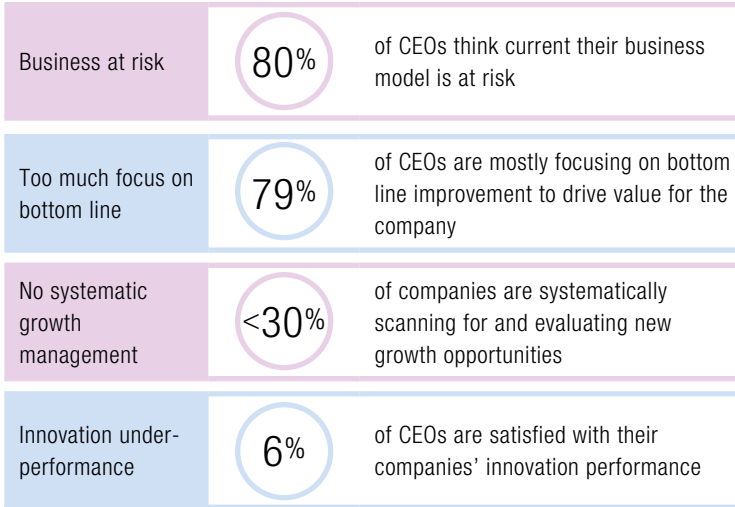
Social agendas that had significant advances over the last years, now have reached a point of inertia – or worse, backlash – and there is a widespread discontentment. The tropical sun loses its shine amid a cloud of uncertainty that covers the prospect of a better Brazil in the future. These agendas often widespread, such as gender equality – lose traction and there is no one on the streets.

How do we believe in social and human development again when the population is also passive?

In this context, applying the resignified concepts of resilience and empathy has become an indispensable requirement to elaborate innovative processes.

At the Festival Path 2018, the most important event of creativity and innovation in Brazil, Ipsos surveyed those in attendance – formed mostly by people employed in communication, marketing and innovation – to understand their perceptions on several topics addressed at the event. When replicating the same research, this time with the general population, the detachment between the perception of the two groups was visible. For the Festival attendances some subjects sounded dated, saturated, while for the general population there was a certain lack of knowledge or disinterest, that caused bored ignorance and prejudice.

Within large corporations the scenario is no different: research conducted by McKinsey & Company - "Agile in the consumer-goods industry: The transformation of the brand manager"¹- shows great concern and certain pessimism between the managers:



IS THERE SPACE FOR OPTIMISM IN THE PIPELINE?

How can we transform the practice of resilience and empathy into something that has a positive impact on our lives, work or society? To reverse this picture of pessimism and insecurity, to put new ways of relating to consumers, products and markets comes to be a breath for all those involved in these relationships. In other words, we need to be creative, innovative – both in the pipeline and in our way of interacting socially and personally with others.

When we look back into the organizations and formal production structures, we realize that, adding to the difficulties of the external scenario, there are factors that make the act of innovating even more challenging, such as efficiency, haste, bureaucracy.

To overcome the obstacles inherent to the structure we need to be even more creative than before, given that we need to optimize resources – including time – and learn how to deliver what's expected in front of the unexpected. In this way, size is the challenge that innovating without purpose ends up being unfeasible – and unlikely.

INNOVATION WITH PURPOSE

Retaking the concept of innovation described at the beginning of the text, the whole act of innovating seeks to fulfill some need. Thinking about products: they are created with the mission to fulfill some desire or solve some problem – occupying a space, relieving a tension. This tension is genuine, intrinsic and often unknown to those who experience it. Therefore, the ability to identify these points of friction between expectation and reality is valuable as a marketing resource – and for any social relationship. These tensions are mostly foreign – external – to the observer. Therefore, it is by the conscious exercise of empathy that it is possible, to observe opportunities for new solutions for new or issues.

Ethnography, by premise, depends on an empathic connection and active observation. Widely used by anthropologists and sociologists it is already practical within research focusing on marketing and is an example of how to apply empathy in a practical way in everyday life. This method is through the lens of the researcher, their emotional repertoires, visual and perceptions about how they feel, what are their values and purposes of the people studied. People, in this case, are viewed more broadly – within their role as a social agent and not just as consumers. The observer must be able to connect, in an empathetic way, to this reality that is not their own, and that, consequently, is rich in learning and new perspectives.

However, empathy does not guarantee the success of an innovation – even more in cases where what is sought is disruption (another word widely used in recent years). Disruption is basically caused by a sudden change in the way you see, consume, or live something – and often comes to meet needs not necessarily

rationalized by people. In this case, we are talking about resilience: the whole process of innovation needs to be driven in a resilient way: the error is part of the method and grows.

A scholar of resilience, Dr. Jacinta M. Jiménez (Stanford University), identifies five important points in the construction of a resilient conduct²:

1. Need for full control vs. events/circumstances;
2. Excessive concerns, cognitive actions to confront them;
3. Failure – challenge if you have opportunity;
4. Stress as a driving force – discomfort as a lever;
5. Have purpose, motivation.

“THE BEST WAY TO THINK ABOUT
RESILIENCE IS THROUGH THE
METAPHOR OF A SEESAW WITH A PIVOT
POINT, WHERE THE ADAPTIVE ABILITIES
ON ONE SIDE COUNTERBALANCE
ADVERSITY AND THE CHALLENGE OF
THE OTHER. WHEN WE LEARN AND
STRENGTHEN THE SKILLS THAT HELP
US COPE WITH STRESS, THE PIVOT
POINT SLIDES SO THAT THE TIPS OF
THE SEESAW ARE DIRECTED TOWARDS
POSITIVE RESULTS MORE EASILY.”
DR. JACINTA M. JIMÉNEZ.

Therefore, innovation is intimately connected to resilience by failure: there is no fault-free innovation pipeline, errors or need for adjustments.

VULNERABILITY AS A STARTING POINT

The purpose of innovation is to have a positive impact, after all, looking at a problem seeking the solution is already in itself a positive story. Therefore, to innovate, we need to have the least amount of optimism in relation to what we expect as a result of this endeavor. However, intrinsic to the act of innovating is the risk – and the risk will not necessarily have a positive impact.

Therefore, a great ally of optimism in the innovative process is vulnerability.

The automatic association we make is between vulnerability and weakness, without remembering that where we are vulnerable is also where we are, we can be stronger. Brené Brown, a scholar of the subject, claims that being vulnerable is “giving up control of the result of acts”, that is, exposing themselves. Therefore, it is impossible to create something new without being in a position of vulnerability and minimally optimistic.³

POINT OF VIEW

The intersection of these three concepts: resilience (power to adapt and flexibility), empathy (ability to understand another reality than their own) and optimism (work with focus on positive result), allied to vulnerability, can be considered as the new way of understanding what human value is needed behind successful innovations.

It's a good way to make sure God is still Brazilian!



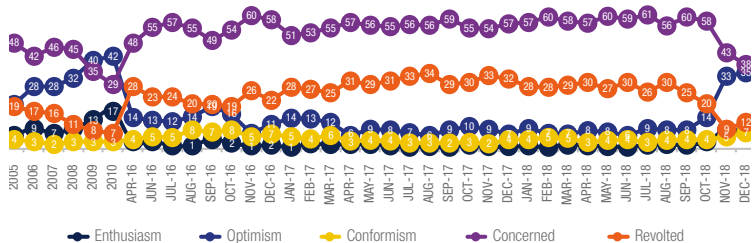
WHAT IS WORRISOME ABOUT POLARIZATION?



Priscilla Branco,
Public Affairs

In 2018, Brazil experienced what may have been one of the most moving presidential elections of our young democracy. In addition to the unemployment of 12 million people and the worsening of other social and economic indicators, the political scene was marked by extremely disturbing events: a former president arrested and charged with corruption and a presidential candidate stabbed during a rally about a month before the first round of the election. The context of unrest, however, was noticeable years before the 2018 election. Since 2013, society has been more clearly experiencing the phenomenon of political polarization. But although we are referring to political differences, we must remember that social polarization is not new, stemming from the great income inequality which denies access to essential services for a considerable portion of the population.

Sentiment about the future of the country:



Although the feeling of concern fell after the October 2018 elections, we can see the division between those who felt optimistic (35%) and worried (38%) in the same period of measurement.⁴

The fact is that the social and political broth we live in was, as of 2013 onwards, thickened by new elements that until then were fairly foreign to our reality. The use of social media by the population has intensified and its use by parties and candidates is a factor that has altered the old familiar formulas through which politicians communicate with voters. Although many researchers are still studying the impact of new technologies on electoral processes, it was evident in the last election that we were witnessing a turning point.

DIFFERENCES AND DIVISIONS

All of a sudden, we had to get used to talking about the effects of algorithms, bubbles and fake news even before the traditional institutions, such as the judiciary, had been able to grasp all the new technological aspects and their possible consequences.

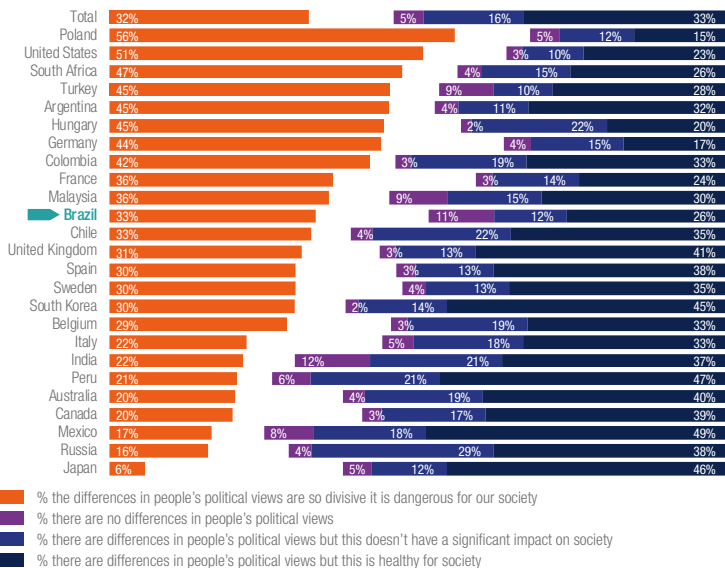
Despite these aspects, social media is seen, by a large part of the population, as the new enabler of expressions, voices and points of view. According to the December 2018, Ipsos Global Advisor survey, 6 out of 10 Brazilians agree that social media platforms like Facebook and Twitter allow people who would otherwise not take part in debates and social issues to voice their points of view.

But while the democratic potential of networks is acknowledged to some extent, it seems that the exchange of opinions between people of different points of view is subject to resistance, both inside and outside the virtual world. Much beyond the mere difference between standpoints, the way in which we deal with differences may be more serious than the realization that we live in a country divided by opposing political opinions.

According to that same survey, one third of Brazilians believe that political differences between people is dangerous for society.

Looking at all countries surveyed, Brazil is in that group of countries where the portion of the population that see danger in these differences exceeds those who feel that differences are beneficial. Neighboring countries Colombia and Argentina are in that same group⁵.

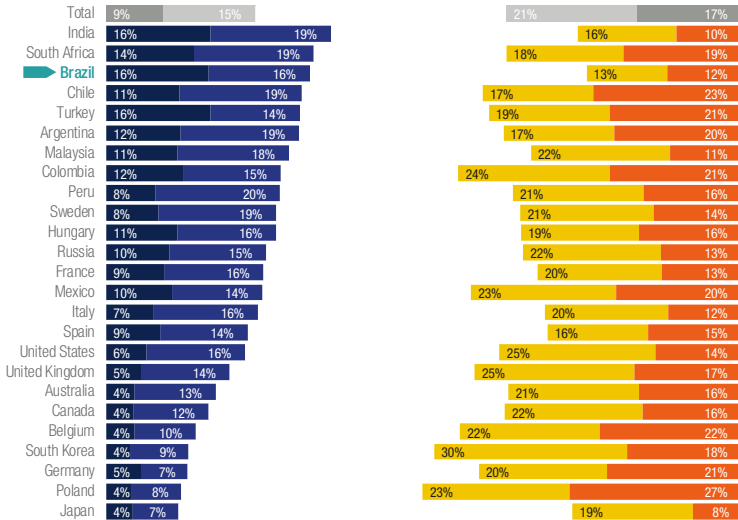
Is the difference between opposing political views dangerous or healthy for society?



In addition, in Brazil, 44% said that society is currently more in danger due to political differences today than it was 20 years ago, a result slightly above the global average of 41%. While this result sparks an alert about how Brazilians see the political context around them, the effects of polarization are even more evident when we look at some attitudinal questions.

For 32% of Brazilians, it is not worthwhile talking to people with opposing political views. The result for Brazil is the third highest in level of agreement, behind only India and South Africa.

Now thinking of the people in your country with political views opposite to yours, to what extent do you agree or disagree with the following statement? It's not worthwhile trying to talk to them?⁶



At survey time, nearly half of Brazilians (47%) said they had conversations about politics and other social issues at least once a week. But 39% believed that people with opposing political views would tend not to change their views, even if evidence contrary to their arguments was presented. This indicates that, for a considerable number of people, changes of opinion arising from debates or exchanges are unlikely, which indicates a posture of “attachment to convictions”.

REMAINING UNYIELDING

This trait seems to be evident when we analyze the following data.

The survey tested respondents' agreement to the following statement:

“Even if I disagree with someone else, I still want to understand them.” In

total, 45% of Brazilians said that this statement describes them very much (25%) or describes them (20%).

On this aspect, Brazil has one of the lowest rates among the 27 surveyed countries, indicating that the search for an understanding of diverging motivations does not seem to be strongly present in people's lives. Accordingly, compromise does not seem to be an option. 35% of Brazilians said they feel comfortable sharing their political views with other people even if these people do not agree with their views.

The survey data was collected shortly after the second round of presidential elections. Although the outcome of the elections was already known, the political polarization thermometer continued to show high temperatures, consequently affecting the way in which Brazilians stood before their peers and acquaintances.

In the first half of 2019 alone, there were several demonstrations both for and against the new government, which leads us to believe that the political polarization will tend to continue; perhaps not on the same levels, but significantly marking the historical period we live in.

POINT OF VIEW

Social media and the last election may have made us realize more clearly that there are many nuances of thought among us. The lens through which we choose to see these various shades is now more important than the actual differences that surround us. To look to the range of standpoints without too much attachment to convictions, or simply make room for dialoguing with the differences are attitudes that may help us make it through these troubled times in a more enriching way. To deny the possibility of dialoguing is socially worse than the political polarization itself.



HOW WILL BRANDS REACT TO THE CONSERVATIVE WAVE?



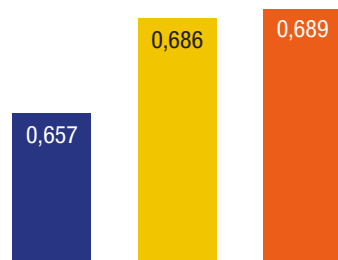
Karen Klas,
Client Organisation

ARE WE GETTING MORE AND MORE CONSERVATIVE?

I believe - as I said at the launch event for Flair 2019 – that we are not. But those who were already conservative seem to have gained a louder voice in the recent years. This is what some surveys show, sometimes interpreted as indicators of increased conservatism: the population feels more comfortable to declare their conservatism by finding support in celebrities and people who represent authority.⁷

As Eliane Brum declared it in her column The Middleman takes over, “We failed to see, perhaps out of denial, how numerous this contingent of people was. The prejudices and resentments repressed in the name of coexistence are now liberated and strengthened by the group behavior of the internet bubbles.”⁸

Index of conservatism in Brazil - PIAUI



Font: Revista Piauí - Pesquisa IBOPE
<https://piaui.folha.uol.com.br/grafico-conservadorismo/>

For a few years, this conservative section of the population felt pressured by 'minorities' (of representation) who gradually consolidated their space, to stay quiet and learn to live with the new times. In Brazil, these changes included not finding it normal be offended by jokes with prejudiced background, among many other behaviors previously considered normal.

According to Brum, the current government's proposals for change work with the illusion of a return, a portrait of the current Brazilian conservatism: "the order of the world returns to "normal" (...), they are taking back the 'control' of their own lives, without being questioned or need to be questioned on such thorny topics as, for example, sexuality and its place in the family and society. They are mainly men, but they are also women who feel that oppression is a low price to pay to return to a territory that, even asphyxiating, is known and supposedly more secure in a shifting world."

This movement is also observed in other countries and was summarized in the last edition of the Trends Observatory – Ipsos' study in partnership with Casa Semio – as "Retrograde (ir)rationalism", the attempt to rescue previous times in which the future seemed more promising.

WHAT DO BRANDS HAVE TO DO WITH THIS?

Faced with the difficulty of being differentiated by products and services, more and more brands have embraced causes as a way of distinguishing themselves in the market. Many of them began to discuss causes that are being questioned in the current context of conservatism.

How will these brands react to the "new social order"? Will they maintain the position they have previously adopted and address the risks involved?

Globally, we see some companies moving in that direction. One example of this was Patagonia. The sportswear brand filed lawsuit against the US government's decision to reduce the protection areas of two national monuments. The brand is recognized for its environmental advocacy and had already become famous

for an advertising campaign that suggested that consumers shouldn't buy one of their jackets.⁹



Another example, perhaps a little less controversial, is that of Anheuser-Busch InBev in relation to sustainability actions. Tony Milikin, Chief Sustainability and Procurement Officer at the company, was one of the participants in the 2018 edition of the Web Summit – an innovation and technology event held annually in Portugal.

Asked about the importance of its investments in technology to reduce environmental impact, in a context in which the conservative American government questions climate change-related actions, Milikin said that sustainability is the company's business and therefore, no matter what the government says about it, the company does everything in its power to reduce its environmental impact.

This includes the use of solar energy in the fleet of trucks transporting their beverages, requiring their packaging suppliers to use a minimum proportion of recycled material, and a partnership with the WWF for the conservation of aquifers, among other initiatives.¹⁰



FOLHA DE S. PAULO
★ ★ ★

Ambev allies with Volkswagen to use 1,600 trucks electrical by 2023

First vehicle of the line should reach the streets of São Paulo until the end of september



Among other brands involved with causes, we can mention:

Converse¹¹, which created a special edition to commemorate the 50th anniversary of the Stonewall revolts, which gave rise to the gay pride parades in the USA.



The **Gillette** case¹², with its controversial commercial questioning of toxic masculinity and social media post starring a plus size model

AND WHAT ABOUT HERE IN BRAZIL?

One of the guidelines that caught the attention of several agencies and advertisers in Brazil in recent years was the diversity agenda. Considered an engine for creativity, diversity became more valued in the composition of teams in different areas. As a language, diversity also has an important role. As Ricardo Sales says in a blog by ABERJE (Brazilian Association of Business Communication), "Communication shapes tastes, can reinforce or challenge stereotypes and is undoubtedly a fundamental process for educating and sensitizing for the differences".¹³

As a researcher, I followed the trajectory of some brands in the defense of causes. While I recognize that some seem to be more genuinely engaged with the raised flags, I have generally hoped that they will all achieve good results in their initiatives

in that direction, since the impact is often positive in bringing prominence to relevant issues. Many of the issues in question are also aligned with my beliefs and values. So, even before the outcome of the 2018 presidential election was announced, I wondered how the brands that were working on these issues would react to the growth in voice of the conservative agenda.

The example of **Banco do Brasil's** campaign in the first half of 2019 was well known. In its fourth month of a government filled with controversy, President Jair Bolsonaro made another controversial decision, with a direct impact on this discussion. He demanded that one of the bank's television ads was withdrawn and claimed that "The line has changed, the mass wants respect for the family, no one wants to pursue any minority. And we do not want public money to be used that way". The campaign aimed to bring the institution closer to the younger audience - and was admittedly more sensitive to the issue of diversity.¹⁴



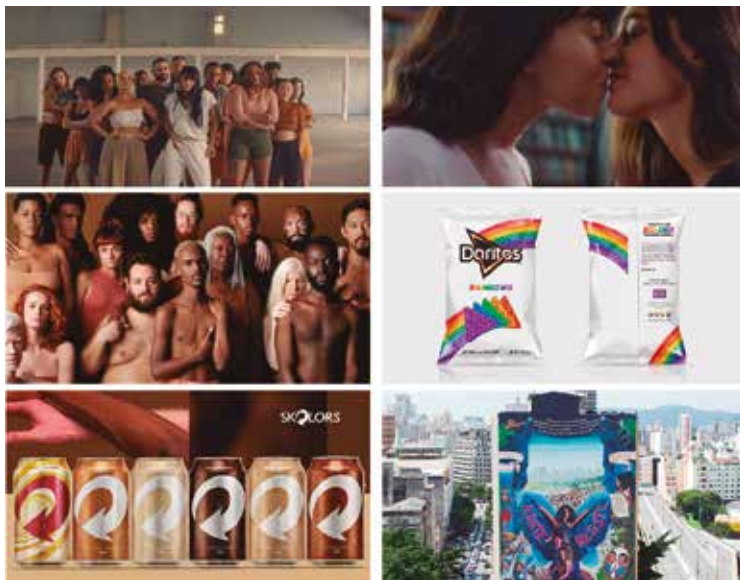
Banco do Brasil is not a brand traditionally associated with the defense of causes such as diversity - although in general it portrays several types of Brazilians in their communication. And the case seemed to evade the will of the team directly involved with the brand, that is, it does not demonstrate an

intentional change of position previously defended. But it can signal the risk of brands being inhibited to work on issues like this.

A non-exhaustive list of examples of other brands that have been working with the diversity agenda includes:

- **Itaú** with its platform to support entrepreneurial women,
- **Skol** with Skolors, a special edition of beer cans with different skin tones,
- **O Boticário**, with different tv commercials representing different minorities (a black family, a child with Down's syndrome, a gay couple)
- **Doritos** with the Rainbow line,
- **Absolut**, the latter two supporting the LGBTQ + cause.

And diversity is not the only theme discussed. There are brands involved in defense such as quality education, more sustainable consumption, among others.



DIVERSITY IS NOT THE ONLY THEME OF INTEREST

There are brands involved in defending flags, such as quality education and more sustainable consumer relations, among others.

The question that remains is: how will these brands that are not directly subjected to the will of the government behave going forward? In a time of brands that go beyond their scope of action and get involved in legislation of causes, which brands will continue to stand by them, which will be silenced, and what will be the impact of this for their engagement with consumers?

The consequence of a brand giving up the defense of a theme will vary depending on how much this agenda is intrinsic link to its *raison d'être*. Thus, a consumer may consider it acceptable to continue buying items from a brand associated with slave labor, if they deem that the brand's proposal – financial, aesthetic, status, etc. – is relevant enough to overcome this transgression. However, this may not be true for a brand that abandons these causes to avoid possible controversies.

POINT OF VIEW

Although the wave of conservatism is palpable, we cannot ignore that it is one of the poles, and that the other pole – to which it opposes – still exists. In times of active consumers, will those who have allied themselves to these brands by sharing their vision, follow with them if they are quiet?



SUSTAINABILITY, RESPONSIBILITY AND VALUE GENERATION: FROM SENSITIVITY TO ACTION



Maiani Machado,
Corporate Reputation



Eduardo Trevisan,
Ipsos UU

As technology evolves, our way of working is more mental-based and so are our skills to survive. The evident urbanization and complexity of our social structures has distanced us from nature and placed us in an environment where everything is produced, consumed and discarded without the origins and destinations of these things being visible.

This has distanced us from our environmental impact, but as the planet presents us with the consequences of our habits, such as global warming and the increasing deforestation, this raises the question: what if life on earth had an expiration date?

THE END OF THE WORLD, A LEGEND?

The theory that the existence of man on earth can come to an end is not new, but it gains traction when our impact becomes difficult to conceal. The collapse of the Anthropocene (the age of human life on earth), many researchers say, is inevitable. But what is this Anthropocene and why should it end?

When we think about the history of Planet Earth, we can divide it into stages that are based on the origin of the impacts that shaped and altered the planet. The Anthropocene is the era that has the impact of man's action on earth as the greatest force of change in its functioning as a characteristic. If in other ages great catastrophes were needed, such as the fall of a meteor to profoundly alter the planet dynamics, today we see that the last 200 years of human action are having a similar effect.

And what does the inevitability of the Anthropocene's collapse mean? That even if we take corrective measures, the end of life on earth may have no return. There is no obvious solution to the situation, and, from this perspective, talking about sustainability from this perspective like an effort in vain.

In a pessimistic scenario where all paths lead to the need for a complete overhaul in our behaviour, where will consumption go? What role should it play? What shape should it take? How are we going to rethink our role in society in a world that shows signs of exhaustion?

Even recycling, which for many years has been the solution to nature's salvation, is now beginning to be seen as an action that further distracts attention from problems than actually solves them. Despite all efforts in this regard, the UN has testified in a recent report that only 9% of the plastic produced in the world is recycled.

Of course, inequality in selective waste collection and recycling projects around the world directly influences this low proportion, but in addition, the whole process of collecting, refining and reusing the material is extremely costly and unprofitable, and has not yet reached the levels expected. The discussion is now moving towards reducing consumption as a way out of the big problems of pollution, focusing on reducing garbage creation rather than the technology to tackle them.

CLIMATE CHANGE, A GLOBAL CONCERN?

A Global Advisor study by Ipsos in 27 countries shows that dealing with the amount of waste we generate is one of society's main concerns when it comes to environmental issues, and is equally important as climate change. These two issues gained the most importance between 2017 and 2018. Globally, 81% of consumers are concerned about the use of disposable and non-recyclable products - in Brazil, this concerns 89% of the population.

But when emergency issues demand urgent cultural changes, we cannot continue to defer responsibility to only old institutions like the government. Since it is not possible to elect a single actor as responsible for correcting existing problems, it is necessary for multiple actors to work in a complementary way. In addition, the boundaries of different sectors of the economy are increasingly blurred: government regulates the market, the third sector accumulates government roles in executing public policies, companies create institutes that act as NGOs, NGOs have commercial concerns with selling products to maintain their activities.

Most people around the world believe that someone has a responsibility to reduce unnecessary packaging, and companies that produce consumer goods are seen to be those mainly for reducing the waste of the world's population by 20%. Consumers are important sources of pressure and can redirect the behavior of companies. The survey conducted for the 2nd Cause-Related Marketing Forum, a partnership between Ipsos, Cause, ESPM and the Ayrton Senna Institute, shows that 77% of Brazilian consumers expect companies today to contribute much more to society than they did in the past.

At this moment, we see the urgency for change in the market to spark new behavior regarding the brands that are consumed. Along with the growth of internet access and content, there is also a new mindset, a rapid change in the social matrix, a new way of thinking based on the logic of networks. This new way of thinking presupposes a structure that allows the non-hierarchical sharing

and distribution of information. That is why the relationship with brands and companies intensify and become more and more dynamic. There is no more one-way communication, no single message defined by brands and companies.

All stakeholders are potential messaging and opinion makers - that means that any event, whether it comes from official sources or not, has the ability to influence the reputation and corporate branding of a company.

THE ERA OF PURPOSE, PROFIT CENTRE OR SOCIAL VALUE AND ENGAGEMENT

In response to this search for purpose and conscious consumption, brands begin to differentiate themselves through their purpose as a company and how they deal - directly or indirectly - with the social problems that affect the society in which they are based.

Consumers can choose not to consume a particular brand or product if they do not see their personal purposes and concerns reflected in them. We begin to use consumption as a tool for something greater than ourselves.

Brands are expected to contribute positively to society as well as to provide good services and products. Environmental responsibility is no longer directed towards reducing risks but is now driven by the demand for making a positive impact.

However, the impact model must be aligned with the business model. Instead of being on the sidelines, the impact and profit must coexist. For that to happen, the challenge to overcome is cultural. Business mental models need to be updated so that they can see what impact and profit can and should walk side by side.

When it comes to sustainability, retailers are leading the way:

- In France, the E.Leclerc chain of supermarkets stopped distributing plastic bags 20 years before the ban on disposable single-use plastic bags was introduced.

- In the UK, the top seven retailers issued about 83% fewer bags (more than six billion bags less) from 2016 to 2017 compared to 2014, due to a tax on plastic bags. TerraCycle launched the Loop™ during the World Economic Forum in Davos. Loop proposes to send products to consumers in customized and durable packaging, which is subsequently collected for reuse and not for recycling. The project will be launched in 2019 in France and the northeastern US, with a subsequent rollout in additional markets. Nestlé, P & G, Unilever, Mars and Pepsi were the first brands to participate and played a role in developing the idea.
- Among the manufacturers, Unilever, L’Oreal, Mars, Coca-Cola and H&M are among the big companies that have pledged to eradicate plastic waste by 2025.
- Adidas, after selling one million sneakers made from plastic removed from the oceans, announced that it intends to use recycled plastic from the oceans in all its products by 2024. In 2016, O Boticario launched a product line called “Cuide-se Bem”, earning the title of sustainable beauty in the “Packaging” category, granted by Organic Monitor. The product line was relaunched with new packaging that combines technology and sustainability, adopting Braskem’s “Green Plastic I’m Green”, made from sugarcane. The bottles and tubes have the same characteristics as those made with traditional polyethylene, but thanks to this new technology they will avoid the emission of around three thousand tons of CO2 per year, helping to reduce greenhouse gas emissions.

Startups are also spear-heading this movement.

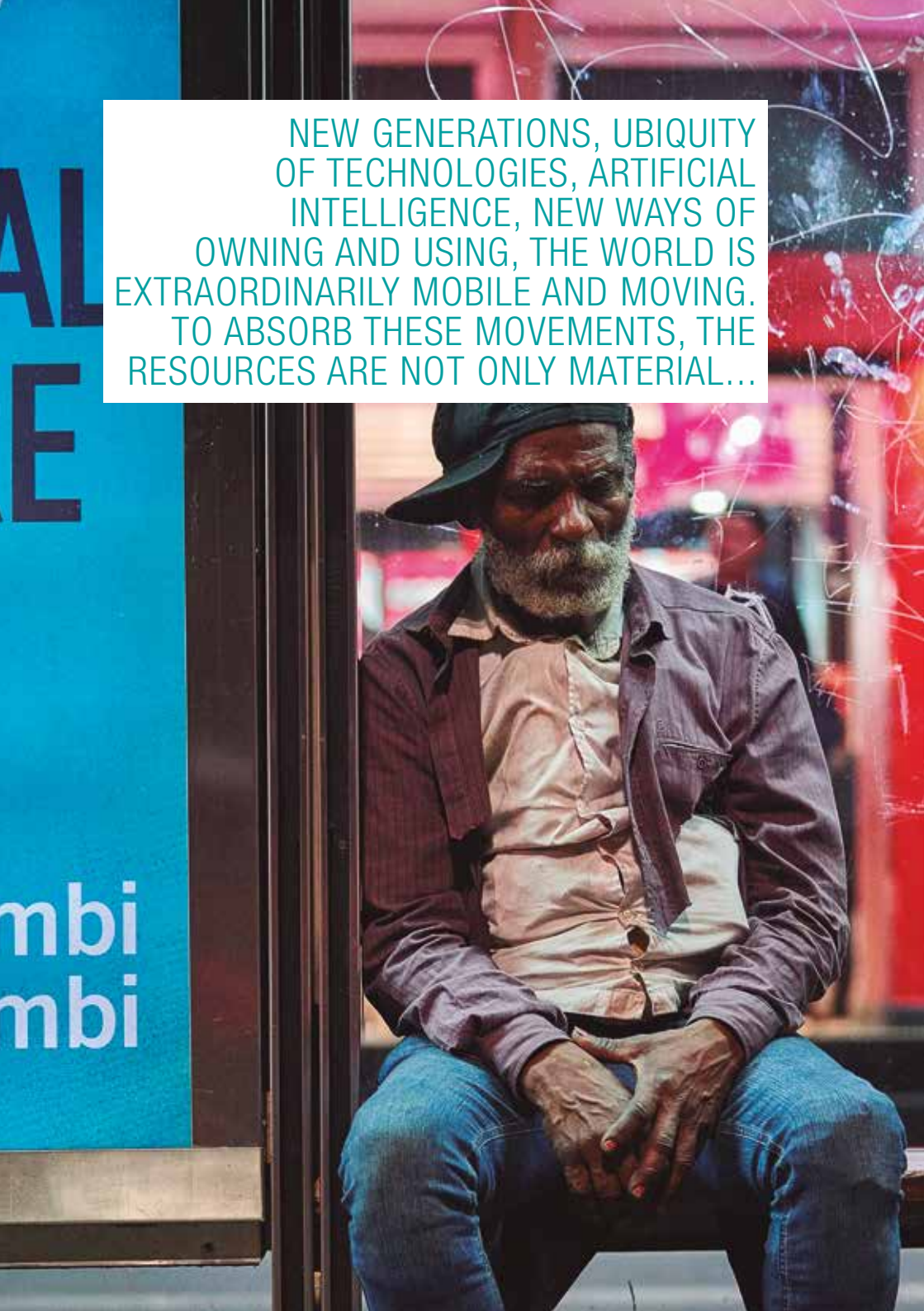
There is a new generation of entrepreneurs who grew up hearing about the importance of recycling waste and using less energy. But the sustainable appeal is not the only reason why there are a growing number of startups linked to the green universe. According to a Green America, EcoVentures International and the Association for Enterprise Opportunity (AEO) survey, 79% of small businesses

offering green products and services say they have a competitive advantage over others in the market. That suggests that, the more the company is committed to environmental services and practices, the greater it's sales will/could be.

POINT OF VIEW

Companies are beginning to understand that sustainability is not a cost, but an investment. The benefits in reputation and competitiveness are remarkable, and it also improves the perception of risks previously internalized in the cost of the company. The consumer market knows of its power over business and is using the power of its money to help influence the world as we all want to see it.

NEW GENERATIONS, UBIQUITY
OF TECHNOLOGIES, ARTIFICIAL
INTELLIGENCE, NEW WAYS OF
OWNING AND USING, THE WORLD IS
EXTRAORDINARILY MOBILE AND MOVING.
TO ABSORB THESE MOVEMENTS, THE
RESOURCES ARE NOT ONLY MATERIAL...





MATERNITY Y & Z: HOW A NEW GENERATION OF PARENTS ARE IMPACTING THE FUTURE OF SHOPPING BEHAVIOUR



Helena Junqueira,
Ipsos UU

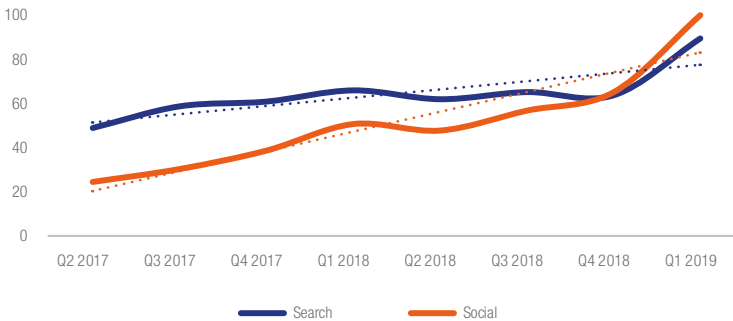
In the universe of parenthood, we can more easily observe questions of generational conflict. Over recent decades, we have seen a reduction in the number of children parents are having, increasing competition between the time spent on child-rearing and the time spent working, rigidity in education losing ground to creativity and freedom and the hierarchical relations between parents and children becoming softer and more based on dialogue. Generation Y, or Millennial, parents (those born between 1980 and 1994) are today the portrait of the new motherhood, but Generation Z – those younger than 24 in 2019 – is not only inheriting characteristics of the previous generation but also promises to break new rules when it comes to raising children.

We live in an era of digital experiences where all knowledge is available and exchanged in virtual environments. The digitally native Gen Z treats their mobile phone as an extension of their body, not differentiating between their online and offline life – the world is “all-line”. This means that they are more independent and self-taught than previous generations. The internet and YouTube are channels for building knowledge, even when it comes to learning how to raise children. For these generations, social networks, digital influencers and online forums are a space of great importance not only for exchanging experiences and information, but also as an emotional support network. And it is in these virtual spaces that the behavioral tendencies of the new generations of connected and well-informed parents are disseminated.

NATURAL, ETHICAL AND SUSTAINABLE FOOD

One of the main characteristics of Gen Z is its focus on responsible, ethical and transparent consumption, which can be seen in the discourse of young mothers around what their children eat. The menu of this new generation of parents, many of them vegan or vegetarian, tends to be reproduced in how they feed their children.

Vegan



The above chart crosses the evolution of Google search indexes ("Search") and social conversations ("Social") on veganism between April 2017 and March 2019. The trend lines show that the topic has been gaining interest in recent years. Sources: Google Trends (Search) and Synthesio (Social).

The concern with health and origin of food is today much greater than in previous generations. In the 1980s it was common for a child's lunch box to be filled with stuffed sandwiches and processed salty snacks, but today's parents offer natural foods and there is strong concern regarding problems like diabetes and obesity in children. Birthday parties, where fried finger food and sweets are traditionally served, now give way to fruits, yoghurts, fresh sandwiches and other sugar-free and fat-free options.

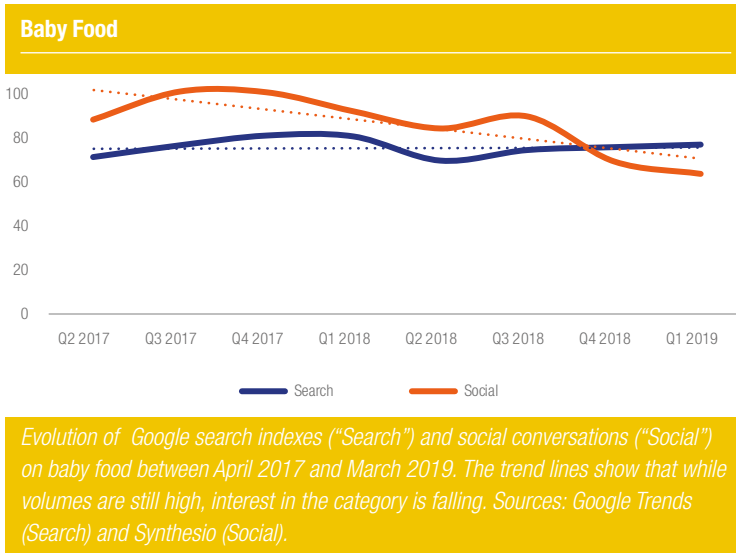
“I AM A VEGETARIAN AND I DO NOT
SERVE MEAT AT MY SON’S PARTIES.
FOR ETHICAL REASONS, I DO NOT
FINANCE MEAT CONSUMPTION,
NEITHER FOR ME NOR FOR MY GUESTS
(...) I SUGGEST SERVING: FRUIT SALAD,
COOKED CORN, MINI PASTA DISHES
(I SERVE THE TOMATO SAUCE WITH
GARLIC AND OIL AND GARLIC AND OIL),
CHERRY TOMATOES WITH BASIL AND
CHEESE, CARROT TIDBITS (CARROTS
WITH LEMON AND SALT), FROZEN
FRUIT JUICES, ROASTED FINGER FOOD
... I HAVE SERVED ALL THIS AND IT
WAS A SUCCESS.”

MOMS FORUM, MARCH/2018

There is a tendency today to prolong breastfeeding for as long as possible and is prioritized as the main food for the baby. Although not new, this behavior goes against the movement that emerged between the beginning of the century and the 1970s of popularization of infant formulas and milks. This is a controversial issue today and mothers who need to opt for artificial foods can be harshly criticized on social networks.

Industrialized baby food is another type of product that may decline in popularity in the next decades, as new generations of parents prioritize homemade and natural foods. This rejection of infant formulas and milks has been felt for a

few years and was one of the reasons why the multinational company Gerber decided to give up selling its baby food in Brazil¹⁵ in 2004 – even though Heinz entered that market in 2013.



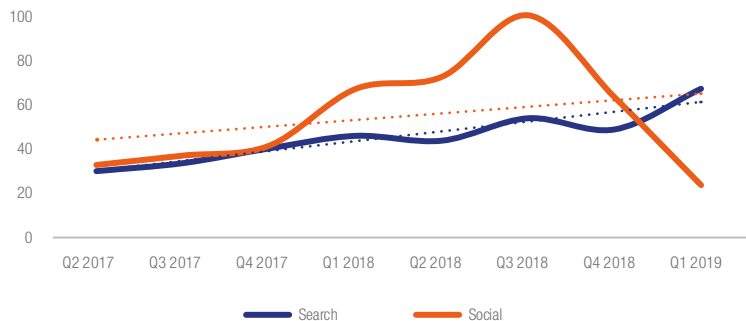
In this scenario, new producers of organic and frozen baby food have been gaining ground, especially those in higher economic classes (A and B). But the meaning of frozen today is not the same as in recent decades. Practicality cannot be prioritized to the detriment of health and new parents are attentive to the ingredients, the mode of production and the absence of preservatives. Cooking at home is still the best option, or the aim is to get as close to home as possible.

“IT [BABY FOOD] HAS A LOT OF PRESERVATIVES TO STAND ON A

**SUPERMARKET SHELF FOR DAYS.
OF COURSE EACH MOTHER KNOWS
WHAT IS BEST FOR THEIR CHILD. BUT
I INTEND NOT TO GIVE IT.”**
(MOMS FORUM, FEB/2018)

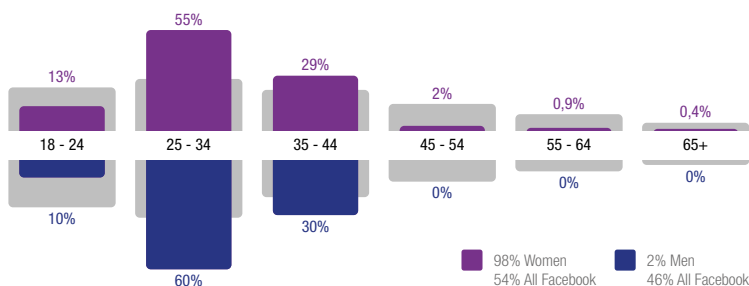
There are also those who completely reject baby food, even home-made ones, because of the BLW (baby-led weaning) feeding method. This movement, which has been gaining ground among young Brazilian parents, encourages the baby's autonomy by allowing the child to use their own hands to feed themselves on fruit and vegetables in pieces. Supporters of the technique argue that it is a way of giving the baby freedom of choice and movement, developing their motor and sensory abilities and making the meal a fun and free food discovery experience without the old pressure from the parents.

Baby-led weaning



Evolution of Google search indexes ("Search") and social conversations ("Social") on the BLW method between April 2017 and March 2019. Although the peak of conversations occurred in the third quarter of 2018, the trend lines show that interest in the subject has shown growth over time. Sources: Google Trends (Search) and Synthesio (Social).

Baby-led weaning



Age and gender of people who are interested in the BLW method on Facebook, compared to the general profile of Facebook users in Brazil. The data shows that the method is adopted mainly by Millennial mothers, those aged between 25 and 34. Source: Facebook Audience Insights; base: 45-50,000 people.

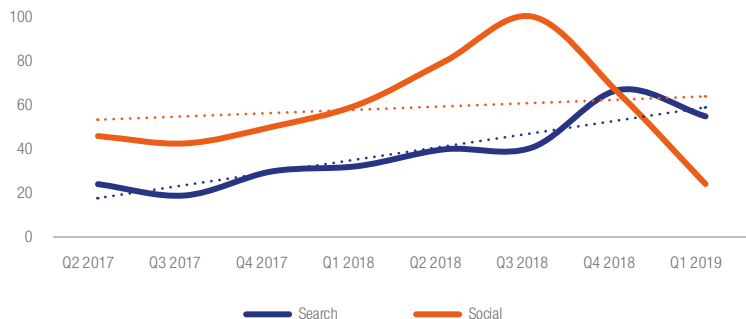
As with breastfeeding on demand, children who already eat solids gain the power of choice in deciding when, in what quantity and which foods they want to eat. This movement comes not only from the parents, but also from a new type of pediatricians, who understand that each child has his or her own rhythm and may have more freedom of choice.

PARENTS ARE MORE EMPOWERED WHEN IT COMES TO THEIR CHILD'S HEALTH

In the process of prioritizing natural and homemade products, medicine has also seen an impact. It is common for young mothers to resort to teas and foods used by their ancestors to avoid their children being exposed to allopathic medicines and artificial products. Cornflour, chamomile tea, coconut oil and other homemade remedies replace talc and ointments for the prevention and treatment of rashes; and compresses and frozen fruits replace anesthetic ointments at the first dentition stage. Moms forums are receptacles of recipes linked to natural medicine and exert great influence when talking about infants and children's health.

“THANK YOU FOR WRITING YOUR EXPERIENCE HERE ... YOUR REPORTS AND A STORY I READ ABOUT THE DANGER OF THE APPETITE STIMULANTS MADE ME THROW IT [INDUSTRIALISED BABY FOOD] AWAY WITHOUT EVEN OPENING THE BOTTLE. I’M GOING TO LOOK FOR HEALTHY ALTERNATIVES FOR MY DAUGHTER TO GAIN WEIGHT. THANK YOU! GROUPS OF MOTHERS ARE VERY IMPORTANT TO MOTHER’S LIFE.”
MOM FORUM, FEBRUARY 2019

Amber necklace



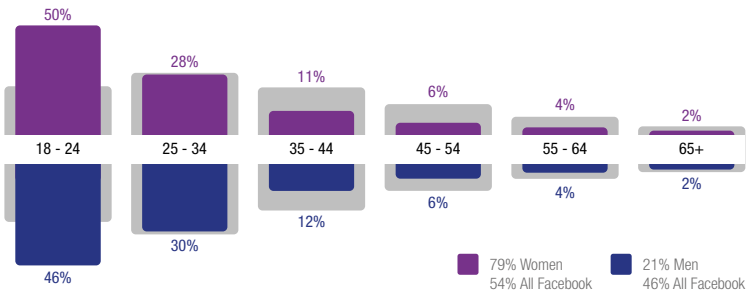
Evolution of Google search indexes ("Search") and social conversations ("Social") on amber necklace between April 2017 and March 2019. Although the peak of conversations occurred in the third quarter of 2018, the trend line of Search shows that Google searches have been growing over time. Sources: Google Trends (Search) and Synthesio (Social).

The once central role of the pediatrician loses importance in the face of social networks: parents, empowered by the internet, come to the doctor's office already equipped with information and they leave willing to seek a "second opinion" from the experience of other parents. Thus, trust in doctors is swapped for trust in tradition, in the experience of other mothers, and even in intuition – the "maternal instinct" in many cases has more power than the doctor. This behavior also brings elements of mysticism, such as the use of aromas and crystals, which are common to new generations. An example is the amber necklace, which has been widely diffused as a natural soothing and immune system stimulator for babies.

FREEDOM OF CHOICE AND THINKING

Gen Z is politically and economically more conservative² than those who have gone before then. This is explained, not only as a reflection of the counterculture – a natural response to previous generations' beliefs – but also by some principles that guide the behavior of these young people. They are pragmatic in their decisions (which are taken analytically and consciously) and more open to dialogue than to confrontation.

Gender equality



Age and gender of people who are interested in gender equality on Facebook, compared to the general profile of Facebook users in Brazil. The data shows that the subject arouses much more interest among the young Gen Z, from 18 to 24 years. Source: Facebook Audience Insights; base: 6-7 million people.

It is precisely because of these factors that this conservatism is not reflected in the ideals of this generation, who are strongly engaged in issues that refer to individual freedom, such as gender and sexual identity issues.¹⁶

Children are naturally being inserted into family compositions that escape the heteronormative pattern modeled up until then. The era of “girls wear pink and boys dress blue” is also over.

Boys are more free to play with dolls and pans, while girls can dream about any profession. Fragile masculinity, a reflection of sexism with a strong impact on the construction of masculine identity, is today a thread of discussion and deconstruction between Gen Z. These new fathers promise to create a new generation freer to be who they want to be and to be respectful each other's identity. This effect is already beginning to be felt by children's brands, which are beginning a process discreetly launching products without gender or with an empowerment discourse for girls.

“MY SON IS TWO YEARS AND EIGHT MONTHS OLD AND LIKES TO PLAY WITH DOLLS, TO GIVE BABY BOTTLES TO THE DOLL, TO MAKE IT SLEEP AND SUCH. I DO NOT SEE ANY PROBLEM IN THIS, IT PROVES THAT HE WILL BE A GREAT FATHER.”
MOMS FORUM, JUN/2018

These moral values are reproduced in the education of children, who gain more freedom of thought and choice. Young parents are decreasing rigidity about what children want to consume, what schedule they want to follow, what they want to wear and what they want to play with. This freedom comes from a more

constructive education, based on the availability of knowledge and the formation of critical thinking, not from rules simply imposed by their family.

Like pediatricians, the school loses the status of a fundamental pillar to be seen as a point of support for parents. Today, children are constantly provided with information via the internet. So, the school's role may be no longer just to provide knowledge, but rather to guide the search, management, experimentation and questioning of information.

POINT OF VIEW

Freedom of choice and thought, conscious consumption and the search for nature are important values for Gen Z, who will educate a new generation that is much more responsible to the world and more open to people. The Brazilian brands of 2020 need to follow the movement and be prepared for this new model of life and consumption. It is important to be aware of the modes of production, the selection of ingredients, the consumer's health, the diversity of profiles, the environment and social responsibility.

There is no doubt that the Brazilians of the future will consume based on what they believe and what they want for themselves and for the world.



GENERATION X: THE BLIND SPOT OF MARKETING



Ana Claudia Malamud,

Ipsos UU



Miriam Steinbaum,

Innovation

GENERATION X: WHO ARE THEY?

In recent years, marketing has learned a new way to classify its target audience: by generations.

It was thanks to the Millennials (or Generation Y) that marketers came to realise how much the socioeconomic, cultural and technological conjuncture can impact the evolution of how a group thinks, acts and consumes. From the need to understand Millennials, companies sought to delve more widely into the theme of the evolution of generations, their behavior, their nature and their challenges. Today, the focus has shifted to the super-young Generation Z and the myths about their behavior that circulate between clients and researchers.

Generation X - a term pre-coined in the 1950s to define those that would be born between 1960 and 1979 - is the generation that comes before Millennials and after the Baby Boomers. Some define the group as those born after 1964, others suggest until the start of the 60s, that is, the late Boomers. The imprecision reflects the very contemporary difficulty of drawing clear boundaries when the notion of time is constantly changing.

In the United States, the term Generation X originally referred to “baby bust”, to the generation so-named because of the fall in the birth rate after the boom observed in the previous period. Known as the “middle sister,” Generation X is not new, not old, has made a career, money, but sometimes seems erased, in the “blind spot of marketing”, forgotten by the urgency generated by the tensions of the relationship between Boomers and Millennials.

In this article, we propose a brief reflection on the challenges and opportunities within this forgotten group, which represents about 25% of the Brazilian population and is responsible for 50% of total household income. This generation which still is the main motor that drives our economy, but seems to have little relevance in the innovation pipeline of our consumers. It is a group that will live for another 20-40 years.

A GENERATION THAT DEFIES CLASSIC NARRATIVES ABOUT TIME

As we know, the increase in life expectancy and drop in birth rates have meant that the world population is aging. A recent study by Ipsos MORI brings an interesting point of view on the subject: “this was a gradual shift and, as mankind seems to be better at detecting immediate changes or dangers than in realizing a constant transformation, our understanding of aging is in fact outdated”. The study questions our own view of time, which tends to be portrayed as a “narrative of decline” rather than a moment of opportunity and change.

In the literature, the first author to speak of Generation X was Douglas Coupland, in the novel *Generation X, Tales of an Accelerated Culture*. Coupland brings an extremely pessimistic view of life in Beverly Hills and characterizes Gen X as frivolous - the generation who learned to see the sun as an enemy, who knows someone who almost died in a liposuction - or as a generation that worries about the prospect of having less money than their parents. We propose to abandon this approach which regards the passing of time as inevitable decay, and instead be more generous, identifying areas of opportunity and creating a narrative that rebuilds the more traditional chronological frames, going beyond our obsession with Millennials or Generation Z.

LET'S ALL GROW OLD

As Arnaldo Antunes reminds us, there is nothing tackier than wanting to be forever adolescent. And yes, Gen X are thinking about how they should grow old.

So, the question is, what is it to be old in 2019? From when do we grow old? Globally we think old age begins at 66, but in Brazil this falls to 64.

This perception is not only driven by the life expectancy and the cultural context of each country, but also by the very age we are in. The older you are, the more likely you are to think that old age comes later.

Thinking about aging does not need to be tragic. In fact, it may remind us of a humorous story: a friend at his father's funeral, who died at age 84, reacted with startling laughter at the classic comment of an aunt who was in her 90s: "but he was so young".

The question of time tends to be seen through a distorted lens, as already discussed in based on Ipsos' long-running global survey, *The Perils of Perception*. In this, for example, we find that asking people to estimate how many people in their societies are aged 60 or over can generate mistakes of more than 25 percentage points. Current records tell us that, in Brazil, the population of more than 60 years represents 14% of the total. In this sense, we already know that the Brazilian population is aging, but, thinking about the coming years, what will we define 'senior' as? In 2015 the average age of a Brazilian citizen was 31 years but in 2050 the projection is 45 years. Generation X, who is now about 45, should be considered elderly when? And what other angles will be needed to understand it, beyond the passage of time?

Globally, about a third of Generation X believes that as they get older they will have more free time and less stress, and that they can devote more time to family and friends, travel, reading, and hobbies. However, the same proportion have concerns about not having enough money, losing quality of life and independence and, above all, losing relevance.

Just over half of respondents worldwide, according to the same study by Ipsos, agree that they are worried about aging – but Brazilians lead the ranking, with 72% saying they are concerned.

Interestingly, older people are less concerned about aging than younger people (54% of those aged 25-34 vs. 46% aged 55-64). Is it that as this phase of life approaches, we come to understand that it is not necessarily negative?

As members of the Generation X ourselves, we believe that we will only be senior after 70, possibly 80 years old. Until then, we will continue to be active and trying to transform the reality in which we live. We want a more sustainable world, we want the adventure, the culture and new experiences.

Among Latin Americans, our study finds one of the most positive views about the prospect of healthy old age, with more than 80% stating that it should age well.

At the age of 70/80, people are closer to the desired peace of mind, according to the same study. Otherwise, the Generation X members have the highest percentage of people that are dissatisfied or anxious. They have to look after their children, aging parents and career demands.

GENERATION X: TALK TO HER

We know that the generational approach as a single explanation of behavior can be very limiting. We must include the cultural, educational and socioeconomic background to delve into the needs of our consumers.

As in Almodovar's movie "Talk to her" (Hable con ella), Generation X does not want to be treated as a patient in deep sleep but wants to see themselves in marketing activities, they want a communication that talks to them. Therefore, we must try to understand the new needs that are on the horizon for this group, what are their concerns, where they place their optimistic and pessimistic look on the future.

Generation X seems to be taking on new challenges, roles, and responsibilities. As a result, they are independent and self-sufficient. They are not digital natives, but they dominate computers and are addicted to social networks. After all, they grew up with Atari and other such games.

Of course, the relationship with technology, whether native or digital, is an important but not exclusive segmentation. We should also consider the force and energy accumulated by these consumers:

- More women in this group are working than previously, and they fight for equal wages and the end of harassment, in movements like #MeToo.
- This is practically the first generation who has lived the end of one or more marriages and learned that it is possible to raise happy children, after a divorce.
- It is a generation that proposes the revision of the concept of maternity, which used to be seen as an inevitable destiny, an asset, of every woman.
- They were also the first to understand that genders can be much more fluid than Boomers thought, and to openly have same-sex partners. They learned about the importance of promoting diversity in their closest circle of friends, as well as in their working environment.
- They enjoy songs created by those on the frontier between late Boomers and Early X, namely international artists such as Nirvana, U2, The Smiths, The Police, Metallica, Guns n 'Roses, Ramones, Pearl Jam, among others. The national scenario brings Legião Urbana, Titãs, Capital Inicial and Ira.
- Regarding fashion and other cultural influences, there is no pattern that characterizes this generation completely, just as there is no more hard dressing codes. Gothic and basic styles end up confusing, with post-punk, rockers, yuppies and a wide range of trends. The Xs joined the styles supermarket, accepting several options.
- The similarities between Boomers and X, as well as between Y and Z, must be considered. However, Xs tend to be more cosmopolitan and urbanized since, like their children, they are being exposed - and adhering - to the

movements that propose a broader use of the cities and public spaces, and also new forms of mobility.

When approaching Generation X, we must consider its historical baggage, as we have done here, while being careful about the limiting nostalgic bias. The brands that make sense for Generation X surely are not just those of the past.

That is, they drink Coke, use Apple; their makeup is MAC and also Boticário or Avon. They use La Roche Posay and Nivea. They hear a lot of rock & roll, but also electronic music, house, Anitta and everything else. Just like everyone else.

If we want to bring back the childhood and youth of Generation X in Brazil, we must remember that they grew up with Xuxa and worship Ayrton Senna, but they also pay close attention to Obama, Lady Gaga and the transformations that Fátima Bernardes underwent.

TV is trying to maintain their traditional habit of watching soap operas. Looking for this goal, they are stocked with this nostalgic bias, as in the novel Summer 90. Radio also looks for this connection by making 'flashback' programs or promoting parties with subjects of the years 1980.

Among the surprises that bring us the passage of time, the X may be "the caretakers". They are raising children-kangaroos, who do not show any urgency to conquer their own apartment. And they will have, for the first time, very old parents.

However, Generation X do not limit themselves to these functions: with their children and younger work colleagues they are learning to navigate with new instruments and, observing the aging process of their parents, they are getting the importance of a good life lived, with freedom to be the best version of themselves.

Generation X are the largest potential market for luxury goods or more sophisticated services, they believe in dermo cosmetics, creams and anti-aging treatments. But they also value the basics, the tradition and the homemade. They seek for innovations that bring a more holistic, balanced life. They want to know and learn more, just as they like to teach and create.

In Brazil, this generation – the adolescents of the 80s - lived the end of the dictatorship, of the hyperinflation and the Impeachment of the president Fernando Collor de Melo.

Worldwide, they saw the end of the Cold War and the overthrow of the Berlin Wall. They understood - and, hopefully, will not forget - that freedom and democracy should be among our fundamentals.

We believe that by seeing protests and demonstrations, Generation X can always access the memory of some other moment in their lives. Thus, they have the culture of contestation in their background, even if without the old hippie look.

POINT OF VIEW

In conclusion, this is a generation that begins to want to shout louder, to avoid the nostalgic perceptions of time or the limitations of being just the “caregivers” or the middle brothers, who inherit clothes and toys from the Boomers and do not give as many worries as Generation Y. Above all, we know that Generation X is not moving away from life but demanding more. And they are resilient, with the ability to make big changes to adapt and grow in their environment.



BIG DATA, SMALL PRIVACY?



Henrique Cintra,
Customer Experience



Marcela Pereira,
Customer Experience

A GLOBAL CONCERN

Privacy is increasingly becoming a topic of discussion in the world. The results of a recent Ipsos survey conducted for the Center for Innovation in International Governance (CIGI) reveals that 78% of people are concerned about their online privacy. Most (53%) say that their concern has increased this year compared to a year ago.

Among all topics reviewed, privacy of their family's data online was the most sensitive topic for respondents: 7 out of 10 respondents report being concerned about this point.¹⁷

The causes of concern come from numerous sources:

- **Governments:** In most major economies, respondents criticize the actions of their own governments regarding measures adopted to ensure citizens' online privacy. Only half (48%) agree that the government does enough to protect its online data and personal information.

- Internet companies: 74% of global citizens feel as though Internet companies have been part of the problem when it comes to increasing concerns about online privacy.
- Cyber criminals: the vast majority (81%) of global citizens think that they have contributed, at least somewhat, to increasing their online privacy concerns.

Less than half are confident that any of the algorithms they have are using is unbiased, with the social media news feeds having the lower confidence rates in this metric (with 32%).

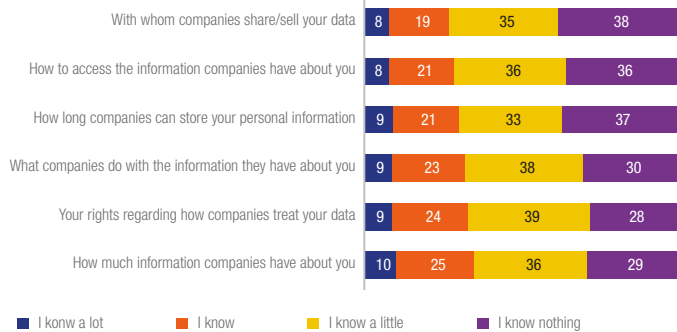
A CONCERN TO BRAZIL AS WELL

You probably didn't get to this article today without having googled something or having used at least one of the apps on your smartphone. Each bit of information you give during these interactions generates data - you probably already know that. But do you know what kind of rights you have regarding your personal information?

If your answer is no, you are not alone: 67% of people around the world don't know either, according to Ipsos Global Advisor study. The study aimed to show how much consumers know about the use of their personal data and the results are startling: most people know little to nothing about what kind of data companies have about them (65%), what companies do with this information (68%) or even with or to whom companies share or sell this data (73%).¹⁸

Misinformation is understandable when we measure the amount of data we are currently generating: in the past two years alone we produced more data than in the rest of the entire human history. In this new context, we face a significant challenge: how to balance the benefits of big data with the preservation of our privacy?

How much do you know about ... (%)



THE LGPD: IN DEFENSE OF CITIZENS AND CONSUMERS

The 2016 US presidential elections showed how lack of data protection can hit a democracy severely, making it an urgent issue to public debate. Since then, governments around the world have acted to maintain the privacy of their citizens' data, prioritizing laws in this regard. In 2018, the European Union was a pioneer in securing data protection legislation, and Brazil followed this move by sanctioning its own package of laws in the same year (after 10 years of slow discussion in the National Congress).

Approved in 2018, the Brazilian Personal Data Protection Law (LGPD) will come into force in February 2020 and specifies the guidelines that must be followed to ensure that companies use personal data appropriately. Failure to comply with the requirements entails substantial fines: up to 2% of the company's revenue (with a limit of R\$50 million).

But what changes are there regarding personal data collection, processing and storage? Some of the key aspects of the new legislation are summarized below.

KEY ASPECTS ADDRESSED BY LGPD

Consent	Companies will need a clear statement from customers allowing the storage and use of their personal data.
Purpose	The use of the data must have a clear purpose and must be communicated to customers, without exceeding what was agreed and consented by the client.
Transparency and open access	Ensures that the holder of the information has unrestricted access to all stored data easily and freely.
Assertiveness	Requires that the information used is correct and up-to-date.
Safety	Companies must implement processes and warranties to prevent data leaks or misuses.
Responsibility	Establishes that companies should have a Data Protection Officer (DPO) to supervise and coordinate the security measures implemented.

In general, the LGPD states the need for consent, transparency and a clear purpose when using personal data.

In addition to this, it determines that only data required for the intended purpose must be collected, remaining up-to-date and secure. It should also be deleted when it is no longer needed. Moreover, the law establishes that no information should be given to third parties without consent from its owner, and that users should have free access to their information, having the freedom to request its update or deletion at any time. Finally, it is important to stress that the LGPD is an extraterritorial law; in other words, any interaction with a Brazilian citizen is subject to this law, regardless of the territorial limits of Brazil (such as stated in the European GDPR).

THE TRADE-OFF THAT CUSTOMERS EXPECT

Although the global Ipsos study shows that most consumers are still unaware of how their personal data is being treated, there is already a perception of the value of sharing personal information, especially in Brazil. In the same study, 52% of Brazilians stated that sharing data helps companies improve product or service offers, and 47% believe that it helps customers save time. There is also awareness about the relevance of this data: 59% of Brazilians understand that their personal information is valuable and that they should, therefore, be rewarded by companies for providing it.

Among the reasons below, which ones would make you more likely to share your data? (%)



Furthermore, Ipsos asked the reasons that would make Brazilians share their personal data with companies. The responses that came up were: if they are clearly informed about the risks they are exposing themselves to and if the products or services offered from this data sharing fits their needs. That is, if the company is transparent regarding data processing and assertive in its usage, most Brazilians would not refuse consent to the use and collection of their data.¹⁹

The LGPD is ensuring there are guidelines for communicating to customers, in an open and transparent manner, how their data can be used for their own benefit.

TRENDS & CONCERNS

Companies that master this issue and get ahead in this debate will conquer an important place in the market by adding transparency as a value of their brand - a movement that is already demanded and valued by customers.

POINT OF VIEW

The arbitration between privacy and access is a crucial issue for all online players. The consumer must give information that involves his/her privacy to access social networks or commercial sites. This is the counterpart to enjoy free services or discount.

Geolocation, smart transportations and smart cities, video surveillance, big data... all these developments will further accentuate concerns about privacy. Between technological progress, optimization of services, data transparency and permanent control (see the social note in China), where to put the cursor?

Concerns about the use of privacy data are already increasing: lack of trust is one of the reasons not to shop on the Internet, for instance. This is a real danger for companies that must find the pillars of the commercial relationship and reassure their customers on all peripheral threats, in particular data security



INFORMATION AND MISINFORMATION: HOW CAN WE TREAT HELPFUL DATA?



Thiago Ramos,
Global Modelling Unit



Erick Vasconcelos,
Global Modelling Unit

In a globalized, highly technological and postmodern world, information is one of the most valuable assets at our disposal for decision-making. And it is not for nothing. It subsidizes and guides the decision-making process, dissipates uncertainties, contributes to more creative actions, increases productivity, reduces costs and risks, identifies opportunities and enables companies to work with high levels of quality.

The big problem is that, even with the amount of information available, decision-making has not necessarily become more efficient. This is because people are increasingly distracted by the various screen choices and end up not paying attention to the content they are being exposed to.

A Microsoft survey compared human attention to that of a goldfish. Among two thousand participants, electroencephalograms – to monitor the brain activity – were performed in 112 people and, according to the research, the average attention time fell from 12 to 8 seconds – between 2000 and 2015. The average golden concentration time is 9 seconds.

According to MIT, 90% of the total volume of data in the world has been

generated since 2013, which has become a major challenge for companies regarding the quality of the information. In Brazil, it is estimated that there has been a growth of 7.5 times in data volume in 2020 compared to 2013 - when we had 212 billion gigabytes. Even if they are impressive figures, this growth is still slower compared to the rest of the world (estimated growth from 4.4 trillion in 2013 to 44 trillion gigabytes in 2020).

HOW TO EXTRACT IMPORTANT INSIGHTS TO MAKE BUSINESS DECISIONS SMARTER

Acquiring knowledge is something that needs to be understood as a process or a product of the whole. Paraphrasing philosopher Aristotle, "Nothing is in the intellect that was not first in the senses" there is no way to acquire knowledge of a database without first having made a deep analysis of it.

The process of analyzing data from surveys, customers, and even social media, fulfills exactly this role of giving meaning to numbers, images, texts, videos and other sources. Companies have invested in several tools for data analysis, as well as in hiring and training employees with such competence be more aligned to the digital transformation and the immense amount of data.

Although it is challenging, this process of collecting, processing and analyzing data has some advantages:

- 1. Smarter and more efficient strategies** for faster data collection and results. In addition, it also allows the usage of several sources of information, making the analysis more assertive;
- 2. Lower costs** because it is possible to aggregate more information to surveys to better understand the consumers, using, for example data which is already available on the web and/or is information that the companies have stored in its database about their clients.
- 3. Happier customers** - It is possible to identify the consumers' needs and

even develop new products and services that will satisfy them.

HOW TO ENSURE QUALITY IN WHAT WE DELIVER?

Quality of information is extremely complex because it involves the reliability of data sources, and the integrity of the whole treatment process and analysis. There are ways of guaranteeing the quality in the extraction and transformation of data, here it is defined that the data must be seen and controlled as a transformation product, being input and resulting from processes to be defined and mapped.

Quality data must pass certain requirements such as: Accuracy (validation of data), Updated, Relevant, Complete (with sufficient depth), Simple (easy to understand), and certainly reliable.

Here, we open a parenthesis to talk about data governance, considering that the quality of information is directly related to aspects of reputation, brand value and effective responses. Data governance is about using the knowledge and competence of people to define policies, responsibilities, data workflow and monitoring, which allow them to improve their quality and understanding, resulting in better analysis and business decisions.

The management issue is substantial for companies and is increasingly being incorporated into their daily life, in a way that, when a company lists its securities on a public exchange, it must disclose all its results to the general public and have all information very well organized. After all, if the company is not in top form, people will not have the confidence to invest.



SOCIAL NETWORKS – FOR BETTER, FOR WORSE, IN ACCUSATION AND IN DEFENCE



Vitória Momi,
Communications



Sandra Zlotagora Pessini,
Communications

A piece of news released at the end of May 2019 captured the attention of the whole of Brazil and had big repercussions in the media.

Najila Trindade, a model previously unknown to the public, accused Brazilian soccer star Neymar Jr. of physical assault and rape. The crime itself already had all the elements to get out of the restricted sphere of police investigation and catch the attention of public opinion: beauty, celebrity, sex, crime and lies. As if it were not enough to dominate the news, the story also came with messages exchanged on social networks, leakage of nude images and an intimate video, support for the accused from a TV presenter and the President of Brazil, and reactions by the brands sponsoring the football player.

More important than the fact itself and the judgment as to whether there had been use of physical violence and rape or whether it is a false accusation and attempted extortion, was what the reaction of the general population, opinion leaders and brands to this sad episode showed us about Brazilian society.

Exempting from making any judgement ourselves let us pay attention to the discourse built around the case.

SOCIAL NETWORKS: A COURT?

Social networks in this story are the genesis of an encounter that went very wrong: they facilitated the contact between the two protagonists, without previous contact and geographically distant, recorded the virtual flirt and promise of casual sex, recorded photos and intimate video, were the stage of pre- and post-sex dialogues that came to be analyzed and pinpointed by millions of readers. They were used as evidence at the centre of the police investigation process, fueled the imagination of public opinion, divided opinions and gave way to countless memes and jokes. The issues raised by the use of social networks here are manifold: the exposure of another person's private life and the reach and impact of what was published (especially when one of those involved has 119 million followers on Instagram) the construction or deconstruction of public images and polarization of opinions, among others.

One of the key issues in this case is the disclosure of intimate photos and video as elements of the defense or prosecution. The images were released as "evidence" by the two protagonists the grand jury called "social media users", as if these social media users could decide who is guilty and who is innocent. The dispute over who spread more evidence against the other in the networks came from the need to win the "Internet Court". By doing so, Neymar broke the law about protection of social dignity, an unethical behaviour in a context where there are already very few boundaries between social and private image and we need to address exposure to harmful content on social media.

Neymar, a public figure with wide international fame who is viewed a role model for children around the world, chose to expose conversations and photos of the accuser, therefore also chose to be investigated based on the Brazilian law 13,718, approved in 2017, which establishes the disclosure of photo, nudity video or sex scene without the person's consent to be a crime.

On the other hand, the model also chose to leak a video made without the authorization of the player, assuming, likewise, the consequences of committing a cybercrime, provided for in Article 20 of the Civil Code, Law 10406/02, in

which the disclosure of images of a person without his consent is prohibited if it damages his honor, good reputation or respectability.

But, after all, what matters is that both parties reveal their “truth” under the stories, posts or any other medium in which the public can judge what is consistent or not. The court’s judge almost had his position usurped by the millions of people online. It seems that it is public opinion what makes the final judgment on who is guilty or innocent. In this context, how can we prevent the dissemination of partial, erroneous or fake news that, in addition to distorting the truth, can negatively impact the life of the other protagonist, his / her relatives and seriously compromise his / her social image?

An Ipsos online survey about fake news conducted in 27 countries in 2018 shows that Brazilians are most likely to believe in fake news among all the countries surveyed. Of those interviewed, 62% stated they already thought that a fake news story was true news until they found out otherwise²⁰.

The first disclosure of dialogues and intimate images made by the soccer player or his advisors received lots of comments on social networks. According to the survey conducted by Decode Research, the mentions related to the soccer player between May 25 and June 2 increased by 782%. The Google Trends tool also points out that, within a period of two weeks after the first disclosure about the case, internet users who searched for the term “Neymar” also consulted, in order of number of terms searched: “Neymar rape”, “Neymar Najila”, “Najila”, “Neymar prints” and “woman accuses Neymar”.

More than the large number of comments and reactions online, which to an extent are to be expected, what is most striking is:

- the management of the crisis and the consequent wear and tear of the social image of the player;
- the force of male chauvinism in Brazilian society and the easy disqualification of rape;
- humor as a prevalent mode of communication in social networks.

MANAGEMENT OF THE CRISIS BY NEYMAR JR. AND HIS ENVIRONMENT

Social networks make clear the speed with which public image is constructed and deconstructed. They amplify and ‘viralize’ everything.

For exceptional athletes, such as those on the FORBES’ ranking of the “100 Most Well-Paid Athletes in the World”, who earn million-dollar salaries and sponsorships, personal reputation is also a social and marketing issue, as it almost always involves a role in companies, brands and advertising contracts. Any slip or unfortunate statement can hurt both the image of the athlete and the image of the associated brands. In that sense, we expect athletes to be exceptional on the court, in the ring, on the soccer field, and in public and interpersonal communication.

With the exponential development of social networks and their presence and influence in our lives, the distinction between private and public life are increasingly blurred. Exceptional athletes use social networks to their advantage and, at the same time, are constantly exposed in them - always, throughout their lives. This is the price of the fame.

In this situation, it is almost impossible for an exceptional athlete not to go through one or several crises at the height of their career. They know that as do their advisors. What makes the difference here is how the crisis is managed and the authenticity that appears in it, in the defense, in the recognition of the mistake, in the apology. People usually have a good feeling of the alignment between the athlete/individual and the athlete/brand.

In 2018, Neymar was the fifth highest paid athlete in the world in the FORBES ranking: US \$71 million in declared salary and US \$19 million in sponsorship. It’s a lot of money and a lot of responsibility. As we discussed earlier, at the beginning of the crisis involving Najila Trindade and Neymar, his advisors decided to dump the messages and photos of the model to the soccer player’s millions of fans in order to defend themselves against the accusation. It was not a very clever move: first because

it is illegal and will see the athlete in court, second because it is disrespectful, third because it is immoral. It shows, at best, a lack of maturity, and at worst, incompetence in managing the crisis. And inevitably has had an impact on the player's image.

Although in this case, only the most critical deconstructed Neymar's image because of the accusation of rape; the fact that he was injured and left out of the 2019 Copa America had a much more significant impact.

The Catalan newspaper Mundo Deportivo published Neymar's statement "I do not want to play in PSG anymore". Veja online in Brazil replicated the phrase leading to widespread condemnation on social media and proved the real reason for Brazilians' anger against Neymar.

In case of rape accusation against a soccer star, the woman is previously guilty. In case of sport injuries, the soccer star is guilty for not participating in the football game. This is Brazil, the country of football!

The image of a figure that is already public in social networks is built from the interaction and effort to establish a closeness with its audience. In the case of a well-known soccer player, social networks came to reaffirm standard and lifestyle - desired by many - and to get the attention of brands. Not just Neymar, but influencers and celebrities in general, have become real media and essential pieces for commercial strategy of major brands. But public image is extremely vulnerable. The attack of unfavorable comments, regardless of the motive, is enough to shake it and put at stake the reputation not only of the public figure, but also of the brands associated to it.



MALE CHAUVINISM AND DISQUALIFICATION OF RAPE

We live in a macho country, which faces a wave (or hangover, as you prefer) of conservatism. And, as stated earlier, the Neymar case says a lot about our society.

In 21st century, women who freely express their sexual desires, their fantasies, have their reputation questioned. They are seen as thirsty for sex, hunters, seducers looking for someone to strike. People use pejoratively the term “maria chuteira”, soccer groupie, to refer to women who harass soccer players and who hang out with them for money and fame. Thus, any woman who is not “famous” and rich, when getting to know a player, falls under the suspicion of being a “maria chuteira”.

Sexist attitudes, conscious and unconscious bias are still widespread in Brazil. Public opinion tends to associate and accept the thirst for sex to men; they are the hunters and seducers. At the same time, public opinion massively judges the woman who seeks casual sex without necessarily wanting a loving involvement.

In the case of Neymar Jr., it goes further than the discussion about gender stereotypes and the colossal inequality between women and men in relation to the expression of sexual desire. We are talking of an accusation of physical aggression and rape.

Sexual violence is the most important problem faced by women and girls in Brazil, according to Ipsos' global survey “International Women's Day 2019 - Global Attitudes towards Gender Equality”²¹. For 39% of Brazilians, sexual violence is the most significant issue, followed by physical violence (34%) and sexual harassment (28%). However, countries like Chile (38%), Canada (35%), Hungary (33%), the Netherlands (33%), Sweden (31%) and Great Britain (29%) rank salary equality in the first place.

It is not easy to report a rape. Like any other type of crime, it is possible that there may be false accusations. But, the fact of denouncing carries with it an almost certainty of having to face value-judgement. “What has she done crossing the Atlantic?”, an interrogation from Brazil's current President, Jair Bolsonaro, is a good starting point.

Understanding what distinguishes rape from consensual sex was also one of the key points of this discussion. It seems a bit cliché, but it is necessary to say that everything that comes after the first “no” is without consent. It’s violence, it’s rape, it’s a crime.

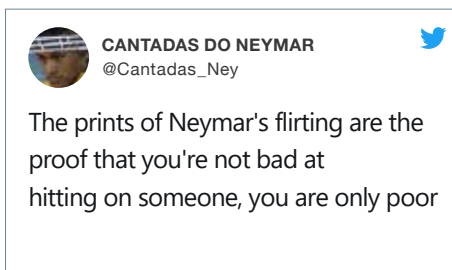
The comments that flooded social networks after the crisis erupted exposed machism in a very expressive way. Both among men in a behavior we can easily associate with camaraderie and corporatism, and even among women, which points out - again, regardless of the outcome of the ongoing case - that the female bond does not always prevail.

The “Internet Court” quickly used the fact that the model accepted a ticket to Paris from Neymar to disqualify the possibility of a rape. Acceptance of a gift, passage, ride, beer can not disqualify a rape. Never. Likewise, many people cited the virtual flirtation and sexual content of the messages to question the morality of the model and rule out the possibility of a rape. A rendezvous can unfortunately become a rape scene.

In the world of football, macho attitudes and thoughts are nothing new. The Portuguese soccer player Cristiano Ronaldo is another example of recent scandal involving a potential sexual crime. And, well, it does not take long - perhaps after the first three rumors that have come up about the case - to win hard-core advocates: club principals and business associates are the first to say they know the football star’s character and that he would never commit such an atrocity.

HUMOR, THE TONE OF COMMUNICATION PREVALENT IN SOCIAL NETWORKS

Memes and jokes dominated the reactions on social networks. The dialogue between Neymar and the model on WhatsApp served as inspiration for the most diverse jokes possible, giving space for some fun in a subject that needed a little more critical vision. Something that is already a habit among Brazilian people.



NUTELLA / RAIZ

Brincar com o
menino Ney é mole...Quero ver fazer isso
com o tio Bruno kkkk

According to a survey conducted by Decode Research, in the first two days of the scandal, 69% of the comments on Facebook and Twitter were jokes about the case.

Many of the jokes about the Neymar affair on social networks softened the gravity of the charges in return for a few easy laughs. Other memes of unrestrained bad taste evoked the murder of Eliza Samudio by former Flamengo goalkeeper Bruno, who is still in prison for the crime, and outraged Facebook and Twitter users. In Brazil, a country that registers a rape every ten minutes and has the fifth highest rate of femicides in the world, according to the World Health Organization, playing games with “Ney boy” versus “Uncle Bruno”, “Nutella” versus “Raiz” jokes raise the question responsibility and ethics. Can you laugh at everything?

LESSON FOR BRANDS

The great football stars even have their last hair sponsored. They become brand representatives and speak for them, and vice versa. Values, behaviors and attitudes evolve a physical person into a legal entity.

Scandals like those that involved Neymar put everything at stake: partnerships, sponsorships, advertisements and contracting. As a matter of fact for the Brazilian ace, Gillette and Nike made cautious statements and reversed their decisions, Real Madrid lost interest in signing the player, MasterCard cancelled his commercial and so on.

Experts clearly know the risks of joining a public figure and also know to what extent a controversial situation can impact their image and reputation. At

the same time, sponsoring a celebrity can be a very worthwhile investment: product and services sales multiply easily when you have an influencer representing your brand.

Brazilians' proximity to the virtual networks and the identification work that influencers have constructed with their audience almost equal word of mouth for the dissemination of a product or service. In the past, we used to take more into account acquaintances, friends or family's recommendations – when they spoke well of a brand - in our purchases. Today it is enough to watch stories of a digital celebrity to want to buy the same products. The proximity the influencer established, our identification with him/her make us want to have the same shopping habits.

POINT OF VIEW

It's time to grow! As a celebrity, brand and example for many Brazilians, Neymar needs to review his attitudes, take responsibility for his actions and better manage his social image, alone or with the team of advisors who work with him.

Brazilian society showed, through this case, how strong is its connection with and fascination with celebrities. It demonstrated its agility in creating jokes and memes but missed a chance to seriously discuss essential issues such as rape, justice work, privacy protection and sexual dignity and the difference between public and private image. In order not to be unfair, we must acknowledge that we have heard intelligent and wise voices about the scandal. However, opinion leaders and politicians only spoke or expressed cordial support of companions for the "Ney boy", reinforcing the previously evoked sexist narrative. Brazil deserves a more adult, informed and critical attitude.

It's definitely time to grow!



NEW LOVE: TILL APPS DO US PART



Marcio Aguiar,

Ipsos UU



Bárbara Penhalves,

Ipsos UU

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01100001 01101101 01101111.
MEANING: "I LOVE YOU"
IN BINARY CODE

Dating apps have existed for enough time that children today are asking the classic question: "daddy, where did you meet mommy?". What did we hear during our childhood? Despite it being vast, the dating pool was consigned mainly to a person's close friendship group. Almost always staged in a carnival ball or in a college party or even at work, the similarity amongst almost all cases started from someone being introduced to someone else and a friend making this connection. It was sort of random and spontaneous, but always with a messenger in-between. Love from the past seemed to always come from somebody's recommendation of "someone who knows someone" in a very common and pedestrian routine fashion "oh your mother was a friend of cousin who lived in the block where there was a small field where I used to play football".

BRAZILIAN SOCIAL CONTEXT

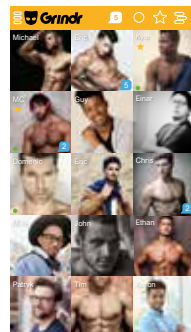
As already expected, due to the social and connected nature of a large portion of the population, it didn't take long for Brazilians to jump on the bandwagon of relationship apps, incorporating them to their daily routines. Having over 220 million active mobile phone users, according to Fundação Getúlio Vargas institution, and being one of the top three countries in the number of social media users (Facebook, Instagram and Youtube), Brazil represents a considerable share of the social media and apps' market. Therefore, the high – and fast – adherence to relationship apps by Brazilians is no surprise.

In addition to the opening of a new channel for socializing and hooking up, which by itself would already have been really attractive to Brazilians, the apps also brought a new space that enables greater freedom of speech. A place where your friends and family won't have access to your conversations with your crush or will find out if you have been talking to one, 10 or 100 people at the same time, nor whether you have a more passive or active attitude when it comes to flirting. The feeling of safety is particularly important for female audiences, considering Brazil is still a really sexist and conservative country and that right-wing movements have grown in the recent years.

In 2006, Helene M. Lawson from Pittsburgh University predicted that "the internet is a new social institution that has the ability to connect people that have never seen each other face-to-face and that can transform the dating process".

In 2019, the applications broke down the mainstream barriers in Brazil.

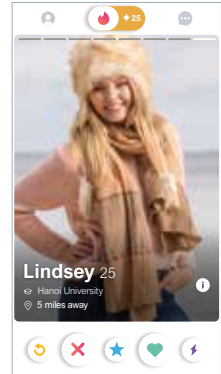
But this was not a surprise. Millennials grew up with dating websites. The encapsulation of the relationships (of any kind, social and professional) already existed for years when, in 2009, when Grindr launched its dating just for men.



Pioneer in its functionalities, the app's main feature is the ability to find matches within a certain range of your location, rather than by zip-code, which was the only feature offered by competitors' websites at the time. In 2012, Tinder expanded the horizon to straight people, as well as reaching out to the LGBT community.

As with Grindr, Tinder was created to solve the problem of a shortage of options within your group of friends, although it has had a different impact when you consider the proportion between straight/LGBT populations.

An app that offers a bigger range of options and possible matches is much more attractive than staying with your old network of friends and work colleagues.



Tinder was immortalized by Gabriel Diniz's song "Jennifer". The hit was launched just in time for the year's late Carnival and, even though many people have looked down upon the song, it made a lot of Brazilians dance and flirt in the offline world. The separation between both worlds, on and offline, is becoming thinner and thinner, and it can be crossed easily in a country as Brazil. São Paulo is only behind Los Angeles in the number of users, and in Brazil, Rio de Janeiro comes in second in the ranking.

In 2017, 26 million matches happened all over the world with Brazil accounting for seven million of the total amount. On top of this, Brazilians are more successful as well, getting 7% more matches than the global average.



LOVE GAME

One of Tinder's biggest attractions for users is the way that its MDA (Mechanics, Dynamics e Aesthetic) was developed. First, the mechanic of profile building is super simple. Through a smartphone, users can log-in to their Facebook account and import all their information from there. Then all the user needs to do is choose which gender they are interested in (male, female or both) and the distance range they to seek matches. This form-filling method is much simpler and thorough than what we can imagine because when permitting Tinder to access your Facebook data, jumping all that endless boring famous basic questions from dating websites, the app will not only get your most trivial information but will learn who you are in social landscape to be able to shuffle the potential matches in a line.

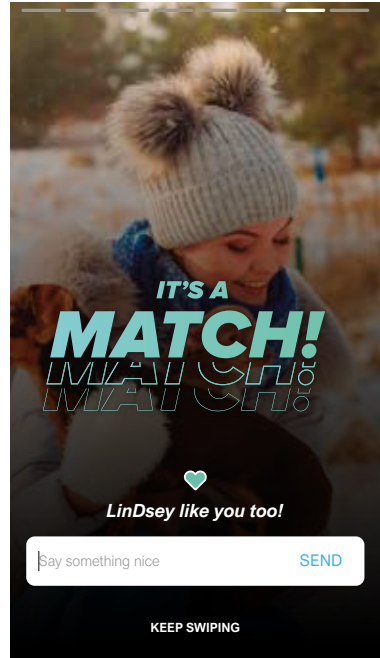
Form filled, the user is ready to start playing. The profiles are presented sequentially, one by one, so the user can swipe left or right, representing their refusal or interest. It's an addictive mechanism. The app curates the profiles you will see and with a little information from the first screen then begins the extensive exercise of "yes and no" with the flick of a thumb.

A huge improvement brought by Tinder against the pioneers Grindr and Scruff is that the user is not able to see all profiles at once, one next to the other like a "human menu". The users have the opportunities presented on by on, simulating what is really like to know someone in real life in a random way. Of course, the user can keep swiping even after a match and then engage in chat, leaving options open.

The dynamics of interaction is very simple and emulates a kind of game where, during the steps the app is involved as an agent, which means, during the search for the match, there're only neutral and positive experiences. When the user comes across someone who's also interested, a new screen pops up with a message saying, "It's a Match!" and you can start conversation or "keep playing". It's important to highlight the psychological effect of constant positive

feedback (intentional or not) to counterbalance the feeling of being refused over and over after the user engages in chat. It's so thought out that the users never find out who swiped "no".

Lastly, Tinder's aesthetic is very assertive. The pioneer apps of this category used a darker set of screens that resembled a lot their forefathers dating websites. Grindr's logo is still a mask that has a lot to do with the behavior adopted by some of its users that refuse to show their faces on the app – a behavior that is heavily criticized by many and is not very common on Tinder (because it uses the profile picture from Facebook account is logged in).



In an interview for the website The Gay UK in 2012, the creator of Grindr, Joel Simkhai said that when the app was created, they were "seeking something hypermasculine and tough". While Tinder's look and feel is much more gender-neutral with clearer colors and friendly-looking set of screens.

COMPARTMENTALIZATION OF FLIRTING

It wouldn't take long for flirting to be encapsulated as several other sectors of our daily lives. We have been trained to create social rules on the internet that dictate how we interact with others online. The creation of a dating application has brought both new features and as it has replicated applications from other categories - such as using GPS to find cabs and private cars. People today stop

looking for partners in everyday life and delegate this function only to the screen of a smart phone.

As ordinary as calling a cab on a rainy day using a mobile phone, apps have also become partially responsible for this social change. A recent research conducted by Cornell University, NY and used as insight for Tinder's global campaign, revealed how the growth of interracial marriages in the United States happened in parallel to the growth in the number of new couples brought together by online dates. Other studies, such as the one led by the University of Essex, UK, pointed out that users of dating apps are more open to interracial relationships. Technology in both cases directly impacts a new demographic setting, where people of different ethnicities would have lesser chances of finding themselves in real life because of their division into separate social groups. This plurality expands to various social aspects. Today, probably Eduardo and Mônica (from the song by Legião Urbana, 1986) could have met through a dating app without having to rely on that weird party with weird people.

TILL (THE APPS') DEATH DO US PART

Contrary to popular belief, the relationship we started with dating apps in 2010 has lasted long, but this may soon come to an end. Despite the effort to stay up-to-date, applications go against some behavioral trends such as the “digital detox” or the attempts to strengthen relationships’ bonds.

Some experts believe that applications such as Tinder are living on borrowed time. Several relate it to the obsolescence of the dating apps, other to new trends arriving to replace the apps. For instance, the biggest players in social media include functionalities on their platforms that could replace another downloaded app. Instagram itself can be used as a dating tool. The social network for photo and video sharing has become another application that allows – and even encourages – the connections among users. Instagram not only

displays an appealing photo collage of your life, but also offers indirect ways of showing interest through likes and comments, helps to connect via private chat and provides data (besides knowing who liked or wrote comments on your posts, you can also see who watched your stories). It is now becoming a more discreet way of flirting than an app specifically developed for that purpose.

There is also an unwritten playbook for flirting online. A well-considered selfie can work as a fishing net, but these fish usually get caught through likes. In a 2017 article from The New York Times, users describe the game's rules as: "one like can mean 'I like you content randomly', but three likes already suggest that 'I am intentionally trying to draw your attention'. It's the equivalent to eyeing someone at a physical environment."

Although Instagram brings more data and deeper information about its users' lives, the profiles are still highly thought through and the contents carefully refined before being posted on the social media – even those silly stories relaxing on the coach with messy hair. This transformation in the way we use Instagram nowadays reflects the mutual influence between social media and dating apps, competing against each other for users' time in front of the screen.

Regardless of how long the apps will last, many keep claiming that there is a lot to be refined. Currently, there are many specialized dating apps, like Glimmer, that focuses on people with physical or mental disabilities and was launched with the intent to promote dates among disabled people. Lemonayde is an app made exclusively for people with chronic diseases and reduced life expectancy due to any singular health condition. These apps appear as an ode of inclusion that only the internet can enable, overcoming obstacles and building bridges between people that couldn't even access a bar or a party because of physical or mental conditions.

Even if in the future dating apps are able to reproduce brain experiences akin to what users feel while flirting, there are still some human factors that will only be replicated through augmented reality (AR / VR) and sensorial gadgets to complement the developmental limitations of an app. Japanese extremely

TRENDS & CONCERNS

realistic sex dolls can be used as models for a manufacturer who wants to replicate human sensations for flirting purposes, taking it to a new level. Such gadgets already have enough power to read a person's body language and to interpret facial expressions, heartbeat, among other things.

POINT OF VIEW

Future generations will learn that relationships can emerge on an app, but they'll hardly learn what is behind it. Previously, relationships come up through the circle of close friends and, many times, intermediated by them. As real as online experiences may seem, the tools will only have the power to bring people together through the data captured by applications. Although the algorithm seems assertive, it doesn't know the user in depth, it only knows the profile carefully thought to attract new matches.

The ruin of dating applications will only happen if they fail to adapt to their users' demands who are increasingly placing their hopes in perfect combinations. Users today already have extremely realistic and customized experiences across websites and applications and will more and more expect that the artificial intelligence meet more complex needs than just a bank deposit.



THE FUTURE OF AUTOMOBILES IN BRAZIL



Célia Sassano,

Ipsos UU

There are a number of factors affecting and transforming the Brazilian market today. On the one hand there is a new generation of consumers more concerned with the environment and/or less interested in owning movable and immovable property. On the other hand, there are the new forms of mobility and with new modes of convenience in the modern world. Not to mention the financial crisis that is reducing the purchasing power of the average Brazilian.

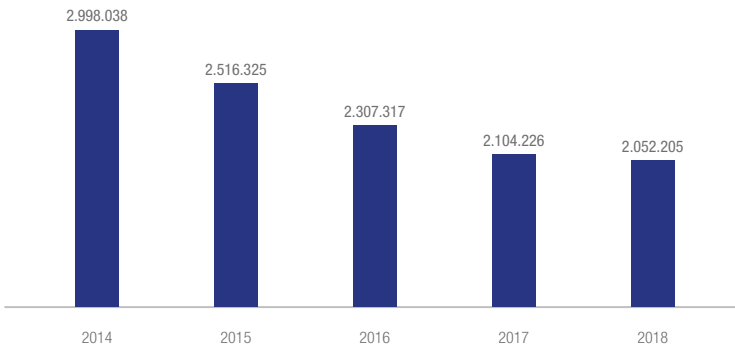
YOUNG PEOPLE ARE REPLACING OWNERSHIP WITH EXPERIENCE

Young people today are acquiring less material goods (including homes and cars - the dream of young people in the past) and prefer to invest in experiences, adventures and travel. And on a good smartphone, of course. This indicates a change in the behavior by younger generations, which value the culture of sharing more than the culture of ownership.

If they need something, they rent it and share it. Mindful of the constant financial crises, they prefer to invest in what brings them the most pleasure. And on what makes them happier, more sociable, and better in social. Talking about a trip, an international experience or an exchange program is more exciting to them than owning a car, for example. What's more, these experiences can be shared on social media.

With this, ownership of a car is no longer a symbol of status and independence for these Brazilians, who obtain a driving license (CNH) later than those before them - there has been a 30% decrease in the licenses issued in the last four years - and prefer to invest in the pleasure of knowledge and discovery.

Emissions of new CNH - Brazil



These generations delay getting a driver's license until they start a family - in their early thirties, when they have their first child and become more stable professionally. This also explains the steady reduction in sales of entry-level vehicles and the growth in more complete models, including bigger cars with larger trunks for traveling with the family.

NEW MOBILITY MODES

There are also new mobility modes, with increasing market share, as well as improvements in public transport that help to explain the behavior of today's youth - a behavior that is also shared by many Brazilians in large cities, regardless of age.

The quality of public transport has been improving slowly in big cities, including air conditioned buses, exclusive lanes for faster traffic and the expansion of the subway system. In some regions, even urban trains are now being used by the middle class.

Mobility apps (Uber, 99, Cabify, etc.), which have been growing since 2016, guarantee individual or group transport at any time and for less money than taxi cabs.

New bike lanes for owned and shared bikes bring convenience and a new way of living and interacting in the city.

The newly arrived scooters are already a hit in many avenues of São Paulo, such as Faria Lima, Nove de Julho and others.

And electric motorcycles should arrive soon, with the same sharing benefits.

These modes of transport were also boosted by the enforcement of Prohibition.

Subscription car rental has also been introduced recently in Brazil, offering the vehicle as a service, as opposed to a product. It promises a brand new car in the garage, with no costs associated with depreciation, taxes/IPVA, documentation, insurance and servicing. This type of monthly fee rental program is offered by Porto Seguro and Unidas.

NEW SERVICES AND CONVENIENCE

Additionally, there is growing offer of delivery services, such as Ifood, Uber Eats and other types of food delivery, which make it easy to eat comfortably at home or the office without needing to go out.

The ever-evolving e-commerce sector eliminates the need to go out to purchase almost anything - appliances, clothes, accessories of all types, fruits and vegetables, groceries, pharmacy items, travel itineraries.

Professionals also drive less than before, thanks to flexible work schedules that allow them to move around at convenient times, along with some companies' home office practices and the widespread use of communication tools such as Skype and conference calling by video or smartphone.

THE IMPACT ON THE AUTOMOTIVE INDUSTRY

Thus, the car can be easily replaced by other mobility and transportation modes that were not previously considered by the middle-class youth, for example.

The automotive industry is experiencing a period of major changes, impacted mainly by the introduction of new technologies.

Also noteworthy is the poor traffic experience, with a fleet of 64 million units in 2018 (54% in the South East region), the highly compromised management of large cities' mobility, and the cost of fuel and taxes that drain the financial resources of Brazilians who choose to own a private vehicle.

Therefore, not buying a car means eliminating negative aspects associated with it: accidents, traffic jams, air pollution, fines and large expenses in a time of crisis and uncertainty in the country.

The mobility options offered today promise to move us faster, more safely and in a more convenient and economical way than in the past. And this is seducing consumers - who are attuned to this new era.

All this results in a drop in new car sales, since:

- People are choosing not to own a car;
- People are postponing trading in their cars, as they are used less often;
- People are choosing not to buy a brand new car (the cost-benefit of used cars has become more appealing to consumers).

THE CHALLENGE

One thing is certain: the consumer experience of cars is changing. The function of the car as individual property will be transformed - perhaps into pleasure or luxury? This may be an answer. Twenty years from now, will owning a car be considered 'old fashioned' or a luxury?

Where is the automotive sector going?

We must adapt to this new scenario and the industry must think of alternatives to serve the market with projects that are in line with the times.

It is a great challenge for the automotive industry to re-adjust to consumers' behavioral changes and offer different dynamics in order to stay active in the coming years.

- **New business models in the automotive market? Shared vehicles?**

They are already being gradually integrated into our reality, through startups, most of which have a fleet of their own or are the middleman for people who rent their cars. They use the same logic as bicycle rentals (point by point through an app), with the entire transaction taking place online - Moobie, Olacarro, Target, Turbi, Urbano, VAMO, Zascar and others.

- **Connectivity? Mobility services?**

The country is advancing in these fields - vehicles connected to the internet will be even more useful with 5G technology, capable of processing mobile data faster, and new mobility services and intermodal connections are advancing in large Brazilian cities.

- **EV/hybrid vehicles that are less expensive and more sustainable?**

Our industry has been working on the supply of EV and hybrid vehicles for some years now. But the cost of the options available is still very high. This is a very expensive technology in Brazil - Audi, BMW, Ford, GM, Jac,

Jaguar, Lexus, Mercedes-Benz, Mini, Nissan, Porsche, Renault, Toyota, Volvo among others are examples.

- **100% autonomous cars?**

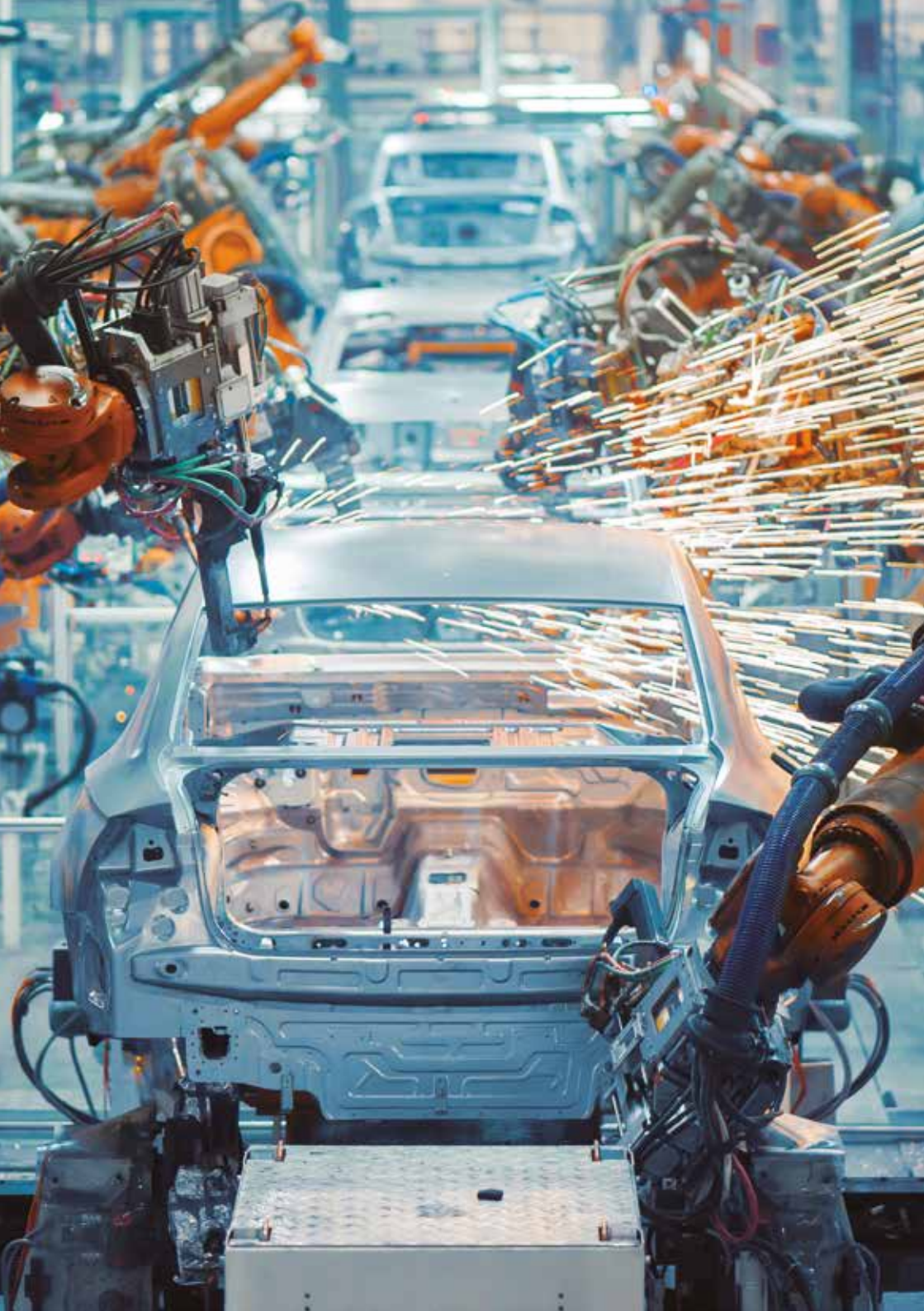
Autonomous cars are still a little far from the local market, without predictions of effective introduction due to high cost, infrastructure and legal problems, among other issues.

POINT OF VIEW

There are many conversations taking place in the country and the industry needs to adapt and offer alternatives (even in the products are sold), in order to win over this increasingly connected and independent generation.

Digital consumer behavior has affected purchase habits in several segments. Consumers today seek convenience and use digital means to make purchase decisions - the buying process starts on the internet and leaves the POS empty. Consumers often go to the store having decided what they want and ready to close the deal, needing only to test drive the car and discuss payment conditions.

Therefore, dealerships need to become more efficient and offer faster service, while automakers websites need to be as complete and intuitive as possible.



AI: WHO OWNS THE FUTURE?



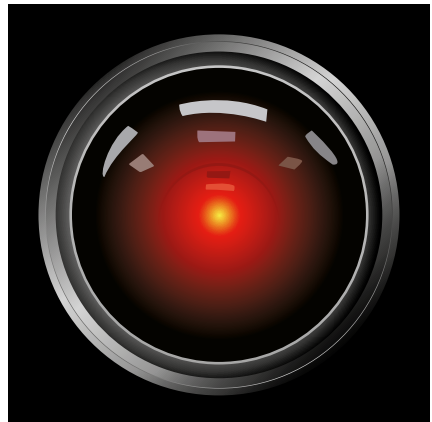
Cássia Lopes,
Innovation



Fernanda Wajchenberg,
Innovation

When the term “Artificial Intelligence” (AI) comes to mind, it is common to associate it with apocalyptic scenarios of robots dominating the world and rebelling against humans. Cinema helped define this idea of the future, which naturally brings some discomfort and mistrust. It may lead some people to ask: is AI reliable? Is it going to steal my data? Is it going to steal my job?

To what extent is the creator dominated by his creation? Recently, AI developed by Google has surpassed the world champion in the Chinese game Go. This involves analyzing countless possibilities from logical reasoning and strategy and is one of the most complex reasoning challenges.



The HAL-9000 computer, one of the icons of Stanley Kubrick's 2001 film: A Space Odyssey, 1968, which depicts a future scenario of man-machine conflict.

If it is natural to fear the unknown, let us then begin by familiarizing ourselves with some concepts:²²

- **Algorithms:** they are the center of AI, being the formulas or programs that teach machines to manage on their own. The “intelligence” part is up to them.
- **Autonomous systems:** these are systems that operate on their own, from previously performed programming. Automation is the basis of AI.
- **Machine Learning:** responsible for enabling the technology to use algorithms to perform its functions - that is, it acts as if the machine had taken classes with someone more experienced and used the knowledge to overcome its challenges.
- **Neural Networks:** computational techniques that present a mathematical model inspired by the neural structure of intelligent organisms and that acquire knowledge through experience.
- **Deep learning:** this happens when the learning layers of the neural networks are in action. It is responsible for AI being able to go beyond the repetition of what was learned, exponentially increasing its database and learnings.
- **AI:** it refers to systems capable of making decisions based on information accumulated in databases. For all this to be possible, AI needs neural networks repeated that will help it learn by itself (Machine Learning) what it is designed to do, replicating the teachings through algorithms.

WHERE ARE WE TODAY?

AI applications are already present in many of our lives: Siri, iPhones’ personal assistant, uses natural language processing to recognize voice commands and perform tasks on a device. Other examples include Spotify’s autonomous music curator systems that make automatic music suggestions, that social media already clusters its users and displays custom content autonomously. And the

trend is an increasing and faster application, at different speeds depending on the application area.

The autonomous stores powered by AI become a reality and will be able to completely transform the way we buy and interact with products. Experiences of voice services via Chatbot have also grown significantly, making - or at least giving the sensation of - a more personal service.

It is important to remember that in 2017 the US, more than 21 retail stores entered bankruptcy due to pressure from giants Amazon and Alibaba. We see traditional retail undergoing a real transformation and brands in this new context must be prepared to provide a new shopping experience.

The introduction of autonomous cars should also transform what is expected of a car. The estimate is that by 2025, 2% of cars will be autonomous and thus used as offices and potentially even as mobile homes rather than means of a transportation. This may resignify the real estate market and the future of the work.

In the field of health, AI may also be a great ally of man. AI, and specifically deep learning, can revolutionize the nature of telehealth and computer-aided diagnostics in the next three to five years.

Nowadays we have overloaded doctors, often failing to devote time to what is the essence of their profession, to study and treat their patients. With AI systems, doctors will be able to access the wide knowledge network of their patients' history and patterns of disease and diagnostic behavior, increase assertiveness in treatments and the chances of a cure and, on the other hand, increase their availability of time and physical layout.

Behavioral science should also benefit greatly. Recent work in the area of self-monitoring has resulted in several ways to measure your body's performance with stimuli, such as with Apple Watch, fMRI, etc. The job of connecting this huge data network to true behavioral perceptions has not yet begun and represents a great opportunity for brands.

Some of the industries that have already been using AI are tech, finance and beauty. In the tech industry, Google has been using AI to autocomplete the terms we type in search engines. For example, in Google Assistant, which combines voice, data and machine learning to bring practicality to people's lives, and Google Ads, which analyzes 70 million signals in a tenth of a second, automating real-time bidding on the Google ad auction and choosing the right audiences and piece for each, accurately and automatically.

In the area of beauty, the giant L'Oréal, who bought ModiFace, has access to its colors and facial feature recognition technology which allows the consumer to try different hair colors and test makeup without going to a brick and mortar store. This is expected to improve users' online shopping process, giving consumers access to new experiences and discoveries, and greater knowledge of the brand and its products.

In the financial industry, we can mention the case of Bradesco, which doubled its investment in AI in 2018 and its app, where robots provide the service, has 70% public satisfaction. Today, the platform answers about 11,000 questions per day. 20%-30% of the bank's sales are made on mobile and it intends to increase this figure by 50% in the next year. To do this, they work to make the platform automate more processes and perform more sophisticated functions, such as investment consulting.

Another Brazilian example is Quinto Andar, a real estate startup that became a unicorn in 2018 and has used AI to optimize real estate pricing, rank the most popular house, and plan routes for agents responsible for inspections. In addition, the company uses the information from its base to understand which features help speeding up the rental process to give owners recommendations on how they can improve their properties to make them more attractive, and if necessary financing the work. With the help of AI, the company has plans to identify locations in neighborhoods with high demand and build new properties.²³

WHAT ARE THE CHALLENGES?

Automation is viewed positively from the point of view of the consumer and the companies, as it minimizes costs and brings efficiency gains. However, as Ipsos MORI studies in the UK point out, several sectors of the economy in which the AI is likely to cause major changes are not ready for this yet.

We do not have enough workforce and knowledge about the new technologies transforming the workplace, this will require great investment in training and professional development.

In this way, AI is a major challenge from the perspective of education. As it is not yet embedded in most educational curricula, many people in the workforce do not have the skills to adapt to the changes that are to be introduced in the next five to seven years. Significant thoughts and investments will be needed for the re-education of many sectors of the economy. Ipsos' Global Advisor: Automation study - with 18,813 adults from 26 countries, including Brazil, carried out between October and November 2018 - shows that almost half of workers globally report that automation has totally transformed their work compared to what it was 10 years ago. In addition, three out of 10 workers say that automation is putting their current job at risk.

In addition to work, AI is also changing the operational definition of privacy. Improvements in data processing and the ability to merge multiple streaming data stimuli (eg, emotional response, facial recognition, purchase behavior, social media data, dating preferences, etc.) will significantly increase what governments and private companies know about consumers. This is a huge opportunity to get to know the consumer better. However, it also raises a question about the ethics of his data's use and unintended consequences.

Added to these factors are the limits of learning and performance of machine learning. The process evolves so quickly and so little is known about its developments inevitably questions about its limits arise. The machine learns by itself, but who is able to understand how far this learning goes, and its purpose of application?

“THE RULES BY WHICH YOU CAN CONTROL TECHNOLOGY HAVE CHANGED RADICALLY,” JACK CLARK, POLICY DIRECTOR AT OPEN AI, TOLD THE GUARDIAN. “WE’RE NOT SAYING WE KNOW THE RIGHT THING TO DO, WE’RE NOT SETTING THE LINE AND SAYING, ‘THIS IS THE WAY.’” WE ARE TRYING TO BUILD THE ROAD AS WE TRAVEL ON IT.”²⁴

The development of technologies that make use of AI brings with it tensions with which we have to deal with honestly, openly and ethically. If workers are replaced by robots, is it up to the company to train them and relocate them to other functions? Yet, if they are generally the less skilled and consequently less paid workers who will be the first to be replaced, would automation be increasing social inequality?

No matter how advanced the simulation of the human factor in machines is, would we be willing to receive psychological care from a robot? We as humans have behaviors that are often xenophobic, racist, macho, and unsuitable in many ways. If machines become sophisticated to the point of performing tasks as humans, learning from human behavior, would they also carry the faults of the human?

As an example, the COMPAS program, used by the US justice system, mistakenly points to double criminal recurrence for blacks compared to whites. We know that the more we make use of systems, the more we have our behavior known and predicted. Our level of propensity for chemical dependency, pregnancy or indebtedness, for example, would be quantified. To what extent are we aware of what machines know about us and how will it be used.

WHAT IS THE ROLE OF INDUSTRY, STATE AND OTHER ACTORS?

Faced with this unknown and complex scenario, the state has the role of regulating and establishing limits for the use and manipulation of data, since AI can also bring real risks to the individual if applied with bad intentions. The General Law on Data Protection (LGPD), approved in Brazil in 2018 and coming into force in 2020, will regulate the guidelines for collecting, storing and sharing personal information and is already an important move in this regard. The industry must value data security, establish ethical limits for the use of personal information, be transparent as to how data is used, how and for what purpose, and act to create desirable future scenarios. Still, if AI knocks at the door, bringing changes in the way we relate, work, enjoy and live, it is up to us individually and as a society to reflect on the consequences and how to prepare for this future.

POINT OF VIEW

We have always been afraid of the new. At the time of the Industrial Revolution, man underwent a process of adaptation to a new reality, feeling fear of this great change that would come and potentially jeopardize the status quo, resignifying the meaning of work. Would it be the end of the job? As we have seen, man has reinvented himself and started using the machine in favor of productivity and efficiency gain. We again went through periods of major changes, the arrival of the internet was just the tip of the iceberg. We are close to a new great revolution and allying AI to human sensitivity and intelligence is key to keeping the consumer at the center of the process. There are some who call AI expanded intelligence, since systems can act in favor of human intelligence, reinforcing what we have most positive and precious -our emotional intelligence and intuitions. To associate all the knowledge and efficiency gains brought to the analyzes that only we human beings have the capacity to realize should be the mark of this new era. It will be artificial intelligence working for our real intelligence.



THE BLACK SWAN THEORY: UNFORTUNATELY, REALITY IS NOT BINARY



Lucas Janon,
Quality Measurement

Imagine a world where everything that is strange and extraordinary can happen. It is not just some daydream or flight of imagination.

Events that have drastically changed the course of history have been, most of them, unpredictable. They took even the most careful one by assault.

PREDICTIONS AND DISASTERS

The Black Death, the largest devastating pandemic in human history, arrived in the dead of night and, by itself, reduced the world's population by a third.

At the end of the 19th century, with the peace and economic prosperity of the belle époque, no one imagined that within 20 years there would be world war.

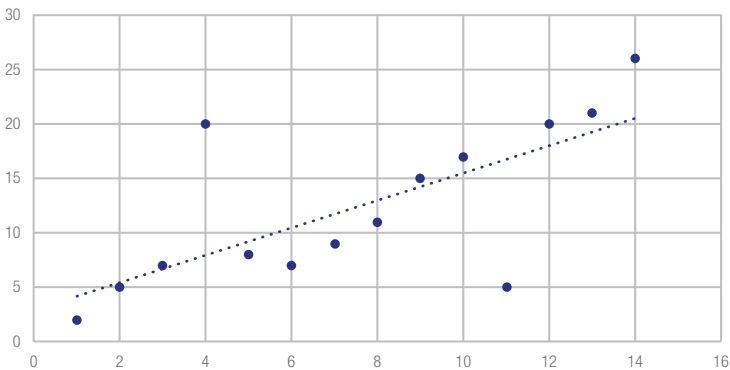
If we knew these events would happen, we would certainly act to prevent them.

Russian-born writer and biochemist, Isaac Asimov, plays with this idea in his novel series named "Foundation". The character Hari Seldon is a mathematician who called to have created a statistical science capable of predicting the future of the human race, psychohistory. With his calculations, Hari predicts an unprecedented catastrophe and outlines a plan to counteract the effects of the disaster.

The idea is tempting. Consider, hypothetically, the possibility of putting all of human history inside a computer with enormous processing power. Perhaps, using state of the art of mathematics and statistics, we would reveal a pattern, a mathematical formula that would give mankind absolute freewill. The future would be an unnecessary abstraction, everything would be in sight.

But for this ambition to materialize, in addition to enormous processing power and a huge mass of data, we would need a model. In mathematics, a model is a representation of reality. Like all representations, it is imperfect and cannot describe a phenomena or event of interest in its totality. It is, above all, a simplification.

Hours of study X Academic performance



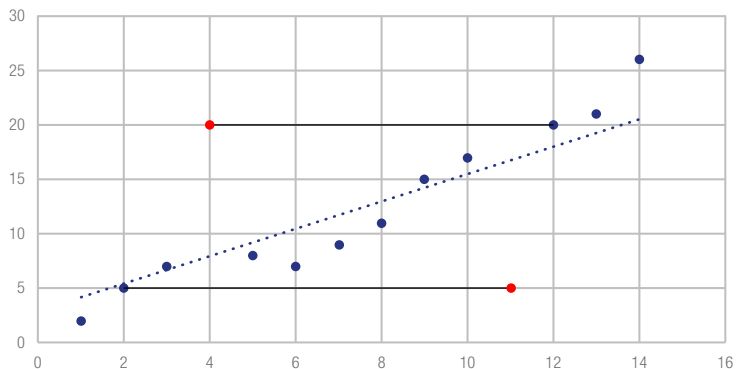
The scatter plot above shows the correlation between X-axis study hours and academic performance (the number of hits in a test, for example) on the Y-axis. There is clearly a strong positive correlation between these two variables so that the longer the study time, the better the student's performance. The data also indicates that this relation is linear so that we can adjust a straight line. This line will be our model. The way we found it to explain the data.

DISRUPTION AND SURPRISES

However, note that although the dashed line matches most points, these are two completely atypical cases.

The students who studied at four and eleven hours, presented significant deviations from the line. The one who studied only four hours, had a performance similar to the student who dedicated 12 hours. While the student who engaged for eleven hours performed identically to the student who studied only two.

Hours of study X Academic performance



Perhaps there is a factor of intelligence, of learning facility that justifies these two outliers. However, our model disregards this and other reasons that might explain academic performance. Even if we exhausted all possible causes and these discrepancy in our model, we would still not be able to describe and predict with 100% accuracy a student's academic performance as there is a luck factor involved. Consider the scenario below:

1. The students' test has an extensive content. Several items will be evaluated.
2. All the questions of the test will have the same weight in the final grade.

3. Students have a finite and limited amount of time to study.
4. The study time dedicated to a theme is directly proportional to the knowledge acquired by the student.
5. Only the teacher had access to the test before the exam and did not reveal to the students the incidence that the subjects will have in the test.

With the above scenario, it is evident that chance plays a relevant role in a student's performance. If the individual has spent most of his/her time studying a topic of low incidence on the exam, their grade will be affected. The scenario, although fictitious, is very close to the reality of an SAT test. If the thematic distribution of the issues is unknown or there is some degree of uncertainty, the luck factor ends up impacting the student's grade.

Even in a banal exercise we must consider the interference of chance, of randomness.

Our brain looks for patterns all the time. We have evolved as a species this way. Our obsession with meaning is such that we see silhouettes of animals and objects even in the clouds.

We resist the idea of randomness because without a cause-and-consequence relationship capable of explaining the world around us, we become distressed.

"Determinism is the philosophical belief that all events are determined completely by previously existing causes. Deterministic theories throughout the history of philosophy have sprung from diverse and sometimes overlapping motives and considerations.²⁵"

In this context, the ideas of Nassim Taleb, the Lebanese-American statistician and risk analyst who developed the concept of the Black Swan Theory, are timely. These are events that deviate from normality, are very difficult if not impossible to predict. But when they do, they have catastrophic consequences. This classification includes the events mentioned above from the Black Death pandemic and the First World War.

In the age of the big data we come to the absurdity of believing that soon data science and statistics will bring a sort of clairvoyance. However, Taleb throws a bucket of cold water on our ambitions when he argues of the existence of Black Swan events.

As we saw earlier, in constructing our model of academic performance, we cannot ignore chances. There will always be a zone of gloom that will cloud our vision of the future.

In an increasingly competitive business environment that chants the word “disruption”, there is a race for predictive models and simulations that helps companies to see as far as possible, thus gaining an advantage over their competitors.

However, there are few who are clear about the limitations of this quantitative approach. In the same way a potter can shape clay into how they want it to look, we can force our data to say what we want it to say.

We cannot regard the statistician as an oracle. Accepting the unpredictable nature of reality is a challenge.

HUMANITY, CHANCE AND INTUITION

Perhaps the solution lies in a human faculty that no supercomputer, like that of our hypothetical exercise, will have; creativity and the capacity for improvisation.

Imagine that on a trip to China, you were arrested by local authorities and need to prove your innocence. However, you do not speak Mandarin and are kept in complete isolation in your cell. All communication is done through tickets that are passed under the door. But not everything is lost. Fortunately, there is a book in your language containing correlations between the Chinese characters and some rules on how to combine them. Given an input (the message in Chinese) there is a rule that determines the most appropriate output.

At first you might have difficulty on identifying the logograms in the rule book. However, with time and practice, you could become very efficient at this task so that people outside your cell (and unaware of the existence of your book) assume that you have mastered the Chinese language.

Yet even being able to produce coherent answers despite knowing no Chinese. You do not understand words, meanings. You are adept at manipulating a syntax (a set of formal rules), but you are ignorant of semantics (context, meaning, abstraction).

The above situation is a mental experiment proposed by the American philosopher John Searle and known as the “Chinese room argument”. It was developed to challenge the strong AI (artificial intelligence) thesis that a properly programmed computer has genuine cognitive states, thus mimicking the human mind.

Computers can perform complex tasks in a few minutes. However, they operate in a manner analogous to Searle’s prisoner. No matter how impressive the results are, machines have no understanding or intentionality.

The world around us and all its complexity requires skills that computers do not have. Mathematics and statistics alone are insufficient to explain reality. Computers should be used as tools, always supporting the understanding and narrative of specialists. To reverse the priority is to defend a perverse reductionism, a way of seeing the world without colours, shadows and depth.

POINT OF VIEW

In this scenario, research firms, and the researcher's role, continue to play a key role in data analysis. Only the human eye is able to identify different nuances and produce meaning, beyond the limits of the algorithms. Face with the imponderable, organic matter will still do better than tons of silicon.



SPIRITUALITY CONCERN AND RECONNECTION



Ana Helena Cleva,
Creative Excellence

THE END OF EXCLUSIVE RELIGIONS?

Our talk about the power of spirituality could not begin without demystifying the idea that spirituality and religion must necessarily have a connection. They can be linked, but it's not mandatory. In fact, these two notions are increasingly thought of as separated. Religiousness requires a person to practice a religion and spirituality is a personal quest to understand issues related to the meaning of life and personal relationships.

However, following a specific religion and taking these doctrines as a life motto is becoming rarer. With so much information and different religions, many people are seeking to take care of spirituality than to follow a religion.

A research conducted in 2017 by the Health, Spirituality and Religiosity Program (ProSER) conducted by University of São Paulo (USP), observed that almost half of Brazilians practice more than one religion, which confirms the idea that people are more concerned about seeking a spirituality instead of following only one doctrine. A statement in the research backs this up: "I stopped being Catholic when it stopped making sense to me. Today, my faith assimilates elements from various religions and inspiring figures that do not necessarily have to do with religion. I consider myself spiritualized: I believe in God, oracle, signs, in the sacred feminine."

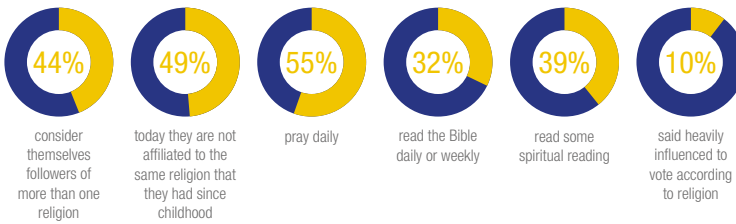
The survey also reveals that 44% of people consider themselves followers of

TRENDS & CONCERNS

two or more religions, and 49% were born in a different religion than the one they have today. And the number of people claiming to be spiritualists is for the first time - significant. In the 2010 Census this rate was only 0.03% of the population, in the current survey it reaches 4.4%.²⁶

The spiritual side of Brazilians

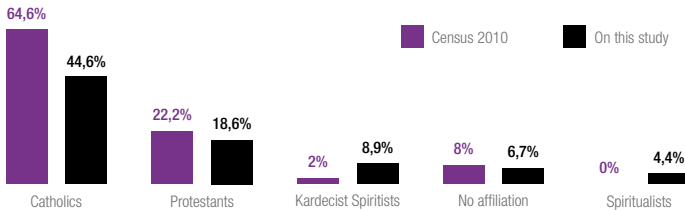
BEHAVIOR



BELIEFS



RELIGIOUS AFFILIATION



DOES SPIRITUALITY IMPROVE YOUR HEALTH?

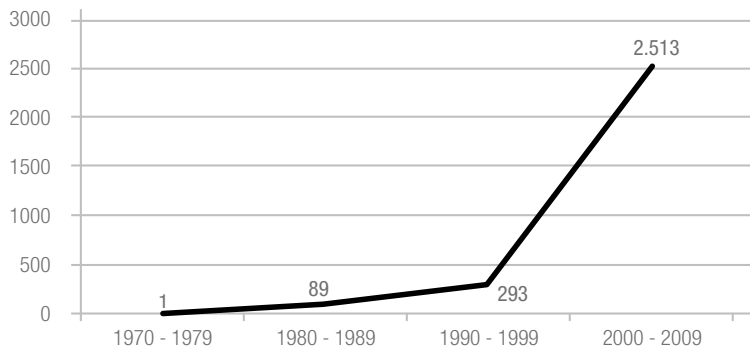
We are also in a time where we are faced with more and more information, meaning our attention is constantly in-demand. Now people have started to look for alternatives to this information overload. This has led to growth of relaxation activities, like acupuncture, and yoga, which have helped reconnect the individual to themselves, escaping from what is scientific and rational.

Even medicine has taken advantage of spirituality to reduce health problems. Dr. Mario Peres, a senior researcher at the Israeli Institute of Education and Research in Albert Einstein Hospital, says there are many epidemiological studies that shows the benefits of faith, spirituality or religiosity as a way to prevent mental health issues, depression, drug abuse and suicide, better quality of life, greater ability to cope with the disease, lower mortality, and improve your immune system.

It is very important that medicine also looks to spirituality as a way to treat their patients instead of medication alone. Treating also the spirituality of the person. Whether it is a terminally ill patient or not. It is necessary to help, to care, to listen and, above all, to instruct.

This topic has gained greater importance in healthcare in recent years.²⁷

Publications “Spirituality + Health”



From the 90's, the subject gains a huge proportion and becomes the theme of main texts and discussions.

However, even with such a large proportion, brands and market in general still diminishes the importance of spirituality. The theme can open up new opportunities for brands, creating a strong connection with the consumer.

There is probably a fear in approaching this issue in advertisements or campaigns, since it is a delicate subject and one which is still very much associated with religious beliefs.

It is necessary to demystify this relationship with religions and to bring much more to self-knowledge and how much people can benefit by taking care of their spiritual side.

There is a high impact message that brands could apply, which is: 'Who are you when no one is looking?' Make people think and reconnect with each other.

Cosmetic brands and beauty care, for example, can use campaigns to help people get to know each other better, care for their intimate feelings, and help those with illness or depression to get better.

There is space for brands to become present, but also to embrace a social cause.



THE KEY TO SUCCESS

TEMOS

Cerveja

SKOL

ITAIPAVA

SCHIN

HEINEKEN

ÁGUA DE COCO

CACHACINHA

ACARAJÉ e ABARÁ

ÁGUA

GUARANA
com AÇAÍ

REFRIGERANTE

BRAND CHALLENGE AND HOW THEY CAN REINVENT THEMSELVES IN A NEW MARKET



Thiago Ramos,
Global Modelling Unit



Erick Vasconcelos,
Global Modelling Unit

WHAT IS A BRAND?

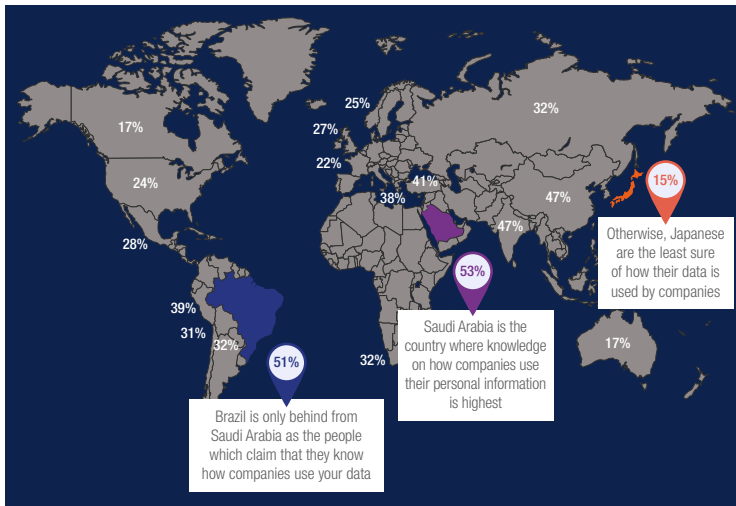
A brand is not just a product or a service; there is much more involved. A brand with a defined personality can generate not only recognition, but also very strong engagement. Experience marketing that seeks to provide remarkable moments for customers and consumers, creates opportunities for connection with the brand, association with the lived moment and memory. Experiences that aim to create stronger bonds and greater engagement.

Brands can also create functional and emotional connections with their customers/consumers by making the best use of the information they have about them. The optimization of the use of the collected information allows a deep understanding of consumers' profile, motivations and preferences and a better monitoring of them in their journey to purchase.

In other words, from the moment consumers first come into contact with a brand, efforts begin to learn more about them, in order to gain their trust, strengthen their relationship, and make them a brand advocate.

CRM (Customer Relationship Management) works as an important ally to collect, record, and enable data analysis across an organization's client base. Information such as the quantity of calls made and received, the evolution and frequency of purchases, the degree of client retention and avoidance, the most loyal segments, among many others metrics, can be analyzed with a good CRM tool.

Ipsos conducted a survey for the Davos forum to understand if people know how companies use their data; some of the results are shown on the map below:



WHO IS REINVENTING ITSELF?

Many brands are seeing opportunities to renew their performance, considering that there is a major transformation in the market, mostly driven by brands that see the gap between the consumers' needs and the service provides by companies on the market to create new business opportunities. This is clear with what we call the Fourth Industrial Revolution, which includes: Uber, Netflix, Spotify and Airbnb.

These brands are successful cases of good usage of information provided by consumer. Netflix itself is a good example of a big brand that uses Big Data analysis for targeted advertising. With more than 100 million subscribers, the company collects countless data, which is key to achieving the industry status that Netflix boasts. If you are a subscriber, you get suggestions about the next movie you should watch.

This understanding of the client and their basis is fundamental today. A well-crafted and targeted campaign can appeal to people and make them more and more loyal to your brand, bringing organic and consistent growth.

The adoption of Big Data reached 53% of all companies interviewed in 2017, well above 17% in 2015, according to a survey conducted by Oxford University. The main areas that use Big Data are telecommunications and financial systems.

Coca-Cola is one of the companies that, in the consumer goods sector, wants to analyze Big Data more and more to increase its market share, because by better understanding its audience, it is possible to draw strategies more assertively. Good use of data is also helping create more relevant advertising content for different audiences, which talks in a more customized way.

Singapore's UOB bank is an example of a brand that uses Big Data to guide risk management. Because it is a financial institution, there is huge potential for incurring losses if risk management is not well thought out. The bank recently tested a Big Data-based risk management system that allows clients to reduce the time to value-at-risk calculation and thereby help them better define how and to whom they will lend funds.

Already in the retail market, we have Costco, which works on customer loyalty through quick notices, tracking what and when people buy. That should not come as a surprise.

What may surprise you, however, is that the information collected may prevent consumers from getting very, very sick. A California fruit packing company

warned Costco about the possibility of listeria contamination in its stone fruits (peaches, plums, nectarines).

Instead of sending a general warning to everyone who bought at Costco recently, the company was able to notify the specific customers who purchased those particular items. First, the company notified them by phone and followed with a letter, creating a closer proximity to the brand.

The truth is, despite all of these innovative uses of Big Data, there is still a fine line between convenience and invasion/lack of privacy. Advertisers and brands are becoming smarter about what information they use, when and how.

POINT OF VIEW

In the not-so-distant future, the question may not be “what do you know about me?” But “how are you going to use what you know about me?”

Preventing the spread of a disease can get you closer to a brand as well as sending a targeted advertisement can help you build empathy and loyalty with your clients, ensuring future sales of your product or attendance in your stores.

cult

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ADVERTISING: IDENTITY CRISIS OR MATURITY?



Cintia Lin,
Creative Excellence

Work meeting. Time to talk about communication strategy. Who is the target? What is the profile? Can we program the reach? Great.

Let's ensure brand insertion right from the start. And let's not forget the offer. Hey, be careful with the colors. Better use the brand's green in the background and yellow on the character's shirt. End of the briefing session. Let's pass it on to the creatives and expect wonders!

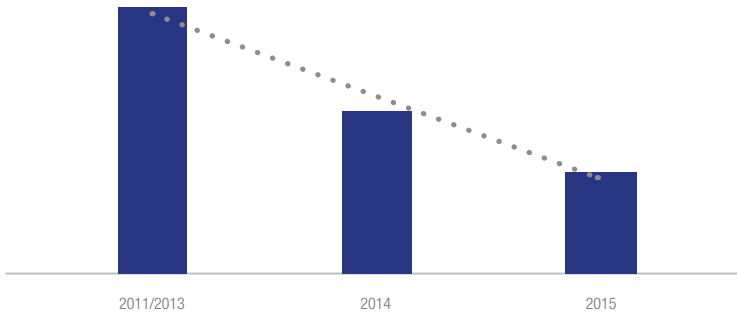
We are doing things right, after all this has been learned and researched. It is the completion of a job. It's called Efficiency and has been the driving force of many companies. But are we doing the right things? That is where effectiveness lies. Efficiency and effectiveness are often confused, after all in a manufacturing plant they are constantly essential for production. But what about in Marketing and Advertising? The rule is not the same when there is a human factor: for a military strategy or in a social context, these two words are not correlated.

In advertising and marketing, the financial goal is to generate profitable sales and deal with constant competition. But the goal in this area is to generate value with emotional, human content, allowing the brand to endure or grow with meaning. Efficiency and effectiveness have distinct targets.

AND WHERE DOES CREATIVITY COME IN?

If advertising efficiency lies in ensuring target exposure to the right media, branding, codes and taglines, creativity is what may bring the most effective result, working as a trigger for engagement and attention, going beyond exposure. If creativity is the soul of business, then why do we see a steady reduction of attention? Indeed ... creativity, for some time, was in the background, overshadowed by numbers and the charms of a world of greater access. Creativity had to adapt to a new context: the digital one.

Advertising recall in recent years: down 7%.



ADVERTISING IS GOING THROUGH AN IDENTITY CRISIS, BUT THAT DOES NOT MEAN THAT THE “SOLUTION” DOES NOT WORK.

WHAT WAS THE DIGITAL INFLUENCE?

The decline in attention occurs precisely because advertisements are focused on the efficiency of its exposure rather than on the effectiveness of its content and storyline.

This has gotten worse in recent years because what has been observed with the growing investment in the digital universe is an increase in this “efficiency bubble”. Logic and programming prevail and IT has become the future of marketing. After all, what marketer has never dreamed of segmenting and granularly finding their specific audience to ensure reach and return on investment?

Yes, the advertising market is facing a challenge. While there is demand for increasingly individualized, personalized, multi-option campaigns, there is also demand for sales, return on investment, optimization and consistency. How, then, can we generate so many executions, so many insights and have enough budget to produce them, if reach is no longer part of the advertising goal; in other words, if the public as a whole, will not see it?

One of the roles of advertising is replaced by the target-finding machine. No wonder the new advertisements are less interesting and annoying to consumers. “Ad blockings” have come as a constant and growing response, showing advertisers that consumers still claim the right to choose and have freedom over content.

Digital changes the advertising market dynamics as far as how advertising is made and what are its formats, as now there are new access platforms such as desktops, mobile phones and tablets to be dealt with and changing financial negotiations in all other media. What’s more, due to the possibility of audience interaction, the digital universe is a major producer of advertising noise of varying quality: from the best seller shared online to the fake video that can destroy a brand’s reputation. While in the past advertisements were already seen with a degree of mistrust, digital access enables even greater access to brands to discuss the content that is shown in their advertisements.

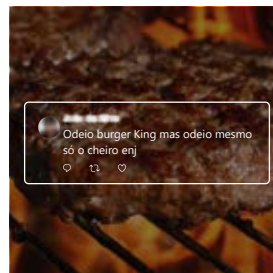
It should be added that in light of the economic and political crisis the country has been going through, there has been and there still is even greater pressure on agencies for results: whether traditional or digital. It is not surprising, therefore, that the creative quality has generally declined.

OH! SO IS THE FUTURE OF
ADVERTISING “NOT ADVERTISING”?

“EASY THERE! AN IDENTITY CRISIS ALWAYS BRINGS REFLECTIONS: WHAT IS THE DESTINATION? WHAT FREEDOM OF EXISTENCE DOES ADVERTISING HAVE? WHAT IS THE SOUL OF ADVERTISING? IT IS NOT THE ANSWERS TO THESE QUESTIONS THAT WE SEEK; WHAT IS DISPUTED IS THE SENSE OF EXISTENCE OF ADVERTISING. IS THERE STILL A SPECIAL PURPOSE?”

The vast majority of consumers believe that a brand has to make sense. It now has to act as a consumer spokesperson rather than a voice to the consumer. That's where advertising comes in: it's the brand's voice, its position, its stand. This is a coming of age moment: for rethinking the brand's purpose, its DNA, its repertoire, its heritage. Content and value creation are important to ensure effective advertising. Advertising gains a new purpose within the brand: to make itself legitimately HEARD. What voice and what discourse does your brand have?

In the illustration right, we show part of a late 2018 Burger King Campaign on the difference between Opinion and Prejudice, using its own example. With striking personality and bold communication style, a brand can translate the consumer's voice about a current social issue into an execution.

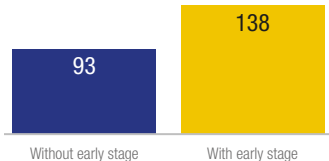


CRIATIVIDADE IS BACK TO BUSINESS!

“IT’S EASY! JUST HAVE A NICE CHARACTER AND A CLINGY JINGLE”.

Whoa! Hold it. Every speech has an essence. And the speaker has to know what to say and how to say it. Creativity in advertising is back in discussion as a game changer. There is no doubt that artificial intelligence will continue to bring innovations that will delight the advertiser with promises of audience reach. But creativity, discussions about insights and content that really matter, are still human skills for which the emotional factor matters. And what does research point to? Is creativity a success factor? Well, throughout Ipsos’ research database, we can safely state: the most memorable, most effective and efficient advertisements: Yes! They all draw on a good amount of creativity and have an extremely strong insight that is approved and recognized by the audience. In an age of DIY - Do it Yourself - whoever has a good reach strategy added with good creative content and production is king.

Overall CEI Index* (attention & brand response)



POINT OF VIEW

Advertisements that had greater planning in the idea development and creativity process in itself generally had better efficiency results as well, which was measured by means of an indicator called the CEI - Copy Effect Index - a combined measure of the creative potential to call attention and to generate response to the brand's goals.



OMNICHANNEL EXPERIENCE FOR AN OMNICONSUMER



Alan Liberman,
Market Strategy & Understanding

The barriers are still great to consumers to really have a fluid experience here. And, unfortunately, they are not only internal (systems, logistic software and controls); Brazil has a complicated and costly tax system and taxes, involving the operations of e-commerce, have not yet been fully expressed in law.

Restrictions for exchanging goods, for example, only in the store where the item was purchased, is another result of the bureaucracy of the Brazilian tax system and inadmissible within the concept of “omnicanality”.

NEITHER ONLINE NOR OFFLINE: A SINGLE CHANNEL TO ANSWER THE NEW DEMANDS

The concept of omnichannel has been around for some time, but it has never been so necessary to understand it and apply it to new business strategies as it is currently.

AT THE CENTER OF IT ALL: THE INDIVIDUAL

We live in an era in which the individual has undoubtedly become the center of all human interactions. The concept of individualism says that the humans have the need to express and reaffirms their freedom as individuals to face a group, a society or the state.

According to Sartre, there is a space, larger or smaller, for the exercise of individual freedom, which makes people able to distinguish themselves from the others, through their choices.

Each individual is unique and wants to be seen and treated as such – in his relationships, at work, as citizen and as consumer.

THE ROLE OF THE OMNICHANNEL

Answer the requirements for exclusivity of these new consumer demands an unique treatment and it is not an easy task. The market has been adjusting, over the past few years to meet these very specific needs and increasing levels of demand.

In this context, omnichannel is a sure bet for companies to align themselves with high expectations and to be available to consumers wherever they want to buy the products.

The term “omni” (omnis/omne) comes from Latin and means “whole”. In this way, the “omnichannel” expresses a major trend for the retail sector of converging all the channels used by a company. It is not only essential to be in all channels, it is essential to make all channels one.

TECHNOLOGIES THAT CONVERGE TO A SINGLE CHANNEL

The technological advances were responsible for forcing big and most traditional retailers to accelerate their move to digital. However, unifying channels was – and for some it is still – a great challenge. The scenario began to change when big digital players, such as Alibaba and Amazon, made a reverse path, going from the digital world to brick and mortar stores.

In a time that seems not to be very far ahead, a consumer who consults his Instagram every day, can fall in love with some a piece of clothing worn by a digital influencer and can use some search engine through image recognition to find a retail store that have the same (or at least similar) piece in their stock. This engine could help locating different online stores with the product, comparing prices and making the purchase – it will all happen in a very fluid way. Even before the consumer thinks his next step, he will already get an email or message on WhatsApp to check his degree of satisfaction.

I SEE IT, I LIKE IT, I WANT IT, I GOT IT...

Making the shopping experience “easier” is, in fact, the third pillar that explains the growth of brands, alongside the higher incidence (more people consuming) and the higher frequency (more frequent consumption). And by making the purchase process “easier”, it means, of course, the offer of high availability (wide distribution, supply of varieties and sizes, visibility at the point of sale, etc.), but also the offer of an absence of obstacles.

In practice, this effort to unite and integrate physical and virtual stores, by integrating data systems (management, inventory, supplies, price, accounting, sales, customer service, etc.) is a requirement nowadays. Create strategies that align all points of contact, to make sure they work with synergy and in a complementary way. It does not only make the purchase process more fluid, but also elevates the consumer’s experience. A unique consumer doesn’t want to simply buy. They want to live a satisfying experience.

This rupture of barriers between the physical and digital world, leads to a new consumer, who’s able to decide where, how and when to buy (without restrictions of place, time or channel). It also generates an extra boost to purchases rates, something already achieved by some companies, which were pioneers in the so-called omnichannel experience.²⁸

A SHOPPING EXPERIENCE

Perhaps the biggest global highlight and great proponent of this concept is the Chinese retail giant Alibaba. It has redefined trade models, unifying what exists of the best e-commerce to the best of brick and mortar stores, combining logistics, technology data systems, media, entertainment and even “gamification”. In their distribution centers (Hema), the buyer can visit and see the product as if as they were in a showroom, and, of course, can buy it through an online order directly from their mobile phone.

The robotics present in the distribution center takes care in quickly selecting the products and since the buyer resides within a radius of 3 Km², they receive the goods in their home within 30 minutes. The success of those centers even caused house prices near distribution centers to rise, since many Chinese people want to be live near to a Hema.

In another major initiative to reduce barriers to e-commerce, Alibaba has partnered with more than six million stores (small family businesses) offering them information, technology and quick access to suppliers, making those six million places to work as “pick-up stores”.

AND IN BRAZIL?

Here, we see the efforts of companies such as Via Varejo, which had its first omnichannel store launched in the shopping mall Vila Olímpia in São Paulo. In a 110 m² space (traditional stores averaging 7,000 m²), the store operates as a showroom and the client can access more than 10,000 items through digital totems. Various technologies help the customer to have a better experience, such as virtual reality. The store uses heat maps to evaluate the flow of customers in its area and cameras that uses facial recognition to help assess their customer's degree of satisfaction.

GIANT BY NATURE ITSELF

In a continent-sized country such as Brazil, logistical barriers are a constant challenge and need to be reduced or eliminated. Here, e-commerce experienced significant growth (growth in 2018 was estimated between 12% and 15%). Initiatives to create “pick-up stores” to solve the delivery range area issues are a great asset to speed up the delivery process (ensuring its security). Partnerships such as that formed by Via Varejo (Casas Bahia and Ponto Frio) with Postos Ipiranga (a major gas station chain) is a good example, with similar strategies being adopted by other big retailers such as Magazine Luiza, Lojas Marisa, Americanas, Saraiva, among others.

The truth is that many companies in Brazil are experiencing new models in the omnichannel concept – Amazon announced in January 2019 the opening of its new distribution center in Brazil, in the greater São Paulo area and the expansion of categories, with free shipping for higher price purchases and fast delivery across the country.

POINT OF VIEW

So, if the individual (as consumer) is the center of this new universe, is it no longer time to replace the omnichannel expression with another that is focused on it? How about “omniconsumer”?



YES, I CARE ABOUT WHAT YOU THINK



Carolina Nass,
Innovation



Luciana Ribeiro,
Innovation

The habit of sharing good and bad experiences about products and services is nothing new.

Word-of-mouth marketing (WoM) has always existed but up until recently took place through the exchange of information between well-known and trusted people, usually contained to family and friends. For Michael Solomon, in “Consumer Behavior,” this practice has been even more effective for innovation. He says, “a way to reduce uncertainty about the wisdom of a purchase is to talk about it.”

In times of empowerment and strengthening of individual characteristics it would be natural, for consumers, to notice a drop in the appreciation of other people’s opinions, when statements such as “don’t mind about what people say” and “follow your intuition to do whatever you really want” can be heard among all social spheres. However, for reasons that include easier access to information and go through the current financial crisis, one point is sharp: consumers might care less about what people will find of them when buying something, but in order to decide what to buy, opinions matter a lot.

We live in times of continuous change, which offers no sign of slowing. Our pace

of consumption and our relationship with brands follow this speed in such a way that the 'omnichannel' environment, that integrates physical and virtual stores, makes consumers feel no difference between online and offline.

This portrait, which was something of a novelty until recently, is now considered the standard.

According to Ipsos's most recent Global Trends Survey, which surveyed 18,180 adults worldwide, globally 76% of people would purchase a product or service that garnered good reviews. This figure rises to 83% in Brazil meaning word of mouth is a major influence in the purchase decision, especially when it comes to new products.

The "omni-consumer" receives real-time information from people who would not have been heard before, either because of the poor quality of the message or because it cannot guarantee the source's credibility. Even so, the voice of strangers came to play an influential role in the buyer's journey, causing the initial word-of-mouth to be strongly followed by its virtual version, the so-called e-WoM.

THE WISDOM OF THE CROWDS

A good argument to justify the consumer's frantic search for countless opinions before shopping may be the consolidation of another phenomenon: the "wisdom of the crowds". The term, taken from the book of the same name, argues that together people can make smarter decisions than the smartest person in the group can make alone.

From this belief, a brand's work in creating a strong, solid and trustworthy image has started to face a new challenge. By increasing their role in the buyer's journey itself, people started to hear more and better information not

only from the companies, but also other people. In a time when all consumers have a voice, everyone can openly recommend, compliment or criticize products, brands and services.

Millennials and Generation Z have taken this behavior to a new level, as they expressed their appreciation for collaboration and relationship as no generation had done before. This has only enhanced the importance of 'personal experience collaborating with each other's decision-making'.

Understanding that the power of influence existing today is not a threat, but a beacon of what is offered is a must, considering that transparency is the main tool to be delivered to those who make technology their ally when researching and sharing insights. In a consumer universe with an exponential growth perspective, knowing what makes your product recommended may cost you less and have better effects.

For example, in 2016 when a frustrated consumer arrived in a Sao Paulo phone repair shop. The customer had tried to have their damaged cell phone mended at neighboring store where they were charged \$180 despite the member of staff not even opening the phone, claiming the need to exchange one of the pieces. The "King of iPhone", when asked about the same situation, merely dusted off the faulty component, returned the device working, did not charge the customer for the service, and only asked to spread the service to friends. The result? A Facebook post with 333,000 likes and 455% revenue growth.

Conversely, the Canadian consumer who had his guitar broken on a United Airlines flight recounted his drama in a series of "protest" videos on YouTube and hit "United Breaks Guitar", has now had over 19 million views. The case was cited as a reason for a steep drop in company's stock (although this may be overstated numbers considering its stock was already down) and was so emblematic that, almost 10 years later, it is still presented as an example in classes about the customer-brand relationship.

**BUT IS IT POSSIBLE TO FORESEE
THESE PROBLEMS AND USE THEM
TO YOUR ADVANTAGE?**

As consumers are becoming more empowered, marketing needs to adapt, and research becomes an even stronger ally. Since each consumer decodes the stimulus to which they are exposed differently, predicting behaviors provides an opportunity to identify and work in advance of existing triggers for positive or negative reactions.

The key point in both cases is to understand how these triggers work for a brand and to be an active part of the dialogue through practical actions such as those mentioned in the study *The Future of Purchase Behavior*. These include:

- Studying the buyers' journey through integrated data analysis, so that consumer behavior can be deciphered by tools that enable analyzing this data before the market;
- Assimilating that the ON / OFF dichotomy has ceased to exist and that, in the current world, the challenge is to serve the consumer who moves between these two universes without noticing differences;
- Contemplating the benefits of technology in the buyers' journey, preparing to meet a complex journey and having rational and emotional understanding of the consumer, undeclared foreseeing what happens in real life.

Brands that build a positive connection with their consumers, even when there is negative criticism, generate loyalty and can become a differentiator. Fostering word-of-mouth works and, when well explored, can determine your survival in a highly competitive scenario. It is an efficient tool, as long as the brand actually practices everything it proposes to its consumers. Otherwise, the risk is high, and the message may come the other way.

So, you already know what makes your consumer talk about you?



DIGITAL DETOX: THE SEARCH FOR RECONNECTION



Luiza Oliveira,
Customer Experience

A FASCINATING DIGITAL WORLD

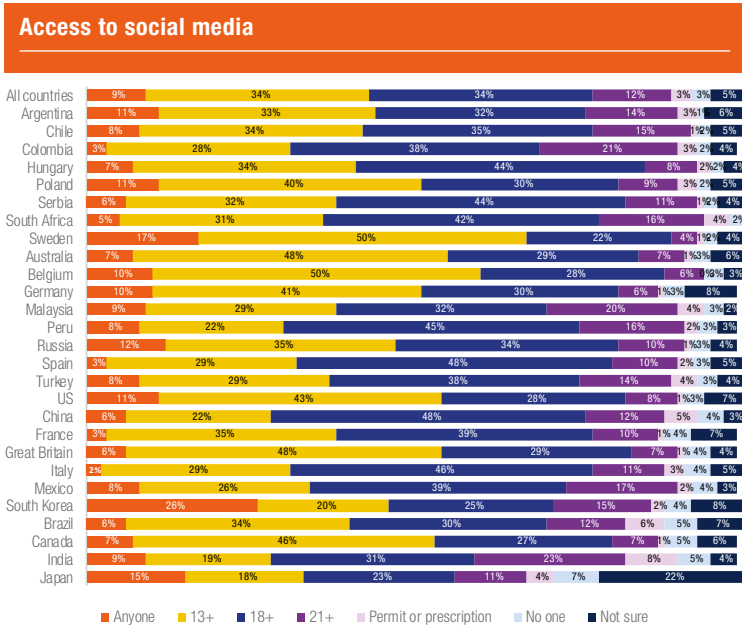
The idea of Digital Detox has been taking shape with the spread of actions that seek a “cure” to the compulsive use of the internet, be it social networks, videos or games.

This “detoxification” of the digital world can be done through activities that promote a connection to nature, such as a weekend in a retreat without access to the internet, replacing your smartphone with a device without connection or, in a less radical way, by applications that control the time spent with each online activity, stimulating a more disciplined use.

Regardless of the format, this wave of Digital Detox has gained space and relevance in our society and brings us the need to reflect on the context that triggers it. While digital media have broadened the reach of our communication, they have dramatically changed our way of relating to time and space, and especially to each other. This transformation unfolds in a myriad of behaviors, in the collective and individual spheres, impacting our socialization process. We normalize our digital interactions in such a way that they seem more natural to us today than our interactions in the offline world.

According to Ipsos' Global Advisor survey, 9% of the population interviewed (18,638 adults in 29 countries) believe that anyone, including children, should have access to social networks, and 34% believe that access should be allowed

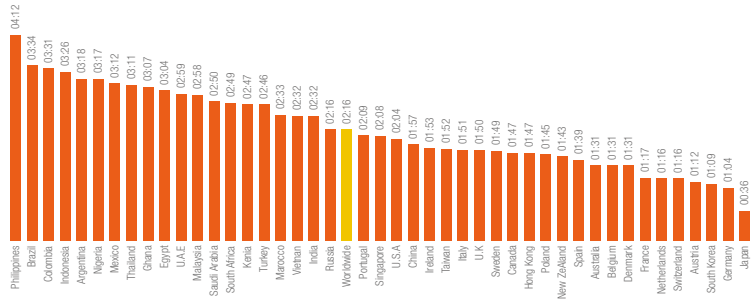
for children from 13 years. In Brazil these proportions correspond to 6% and 34% respectively.³⁰



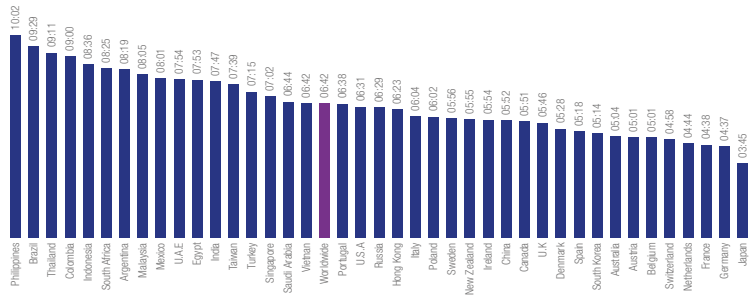
THE ROUTINE OF THE SOCIAL NETWORKS

The digital media, which have already represented, as a means of communication, a promise of narrowing the distances and differences between us, as they become naturalized in our routine, show how much our interactions are more superficial and our attention more divided. What is troubling about this transformation, especially for the digitally born generation, is that what we are gaining from our digital interactions does not seem to make up for what we are missing out on. When we divide the attention between the screen of the cell phone and a face-to-face conversation with someone, we are not totally present in either of the two worlds. Brazil is the third country that spends most hours of the day on social networks, and the second in time spent per day on the internet.³¹

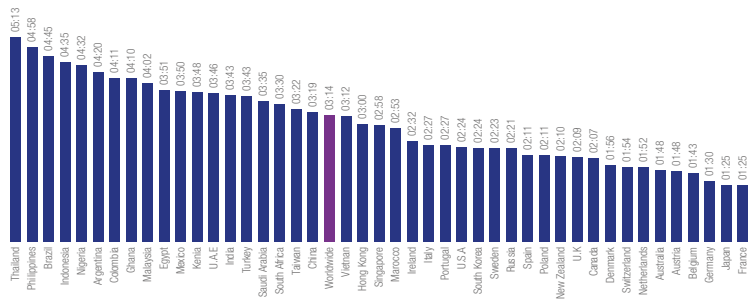
Time spent on social media (January 2018)



Time spent per day on the Internet (January 2018)



Time spent per day using mobile Internet (January 2018)



NEW INTERACTIONS

When we feel bored, we turn to our cell phones. When we wait in line at the supermarket, or when we meet a neighbor in the elevator, the escape from the eye to eye, with the eye on the screen, is familiar. Are we losing in some way the spontaneity of our interactions?

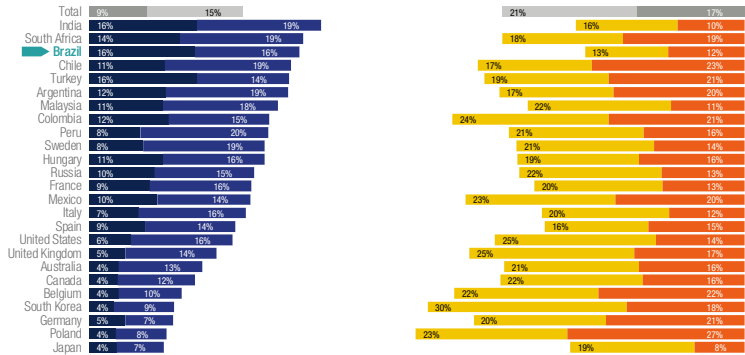
Our family conflicts are resolved by WhatsApp messages; it is common to prefer to type than to speak. While in the digital medium text communication is most often constructed logically and coherently to make up an editable image that everyone wants to leave behind, our interactions in the offline world are conflicting, often illogical and fragmented. In the world outside the digital sphere we are vulnerable, and it is from this vulnerability, inherent in the human being, that we develop our capacity for empathy, and the very understanding that each person constructs from him/herself and from others. That is where we establish more effective relationships, and where we deepen them.

Writer and psychologist Sherry Turkle, who studies our relationship with digital culture, claims that we have never been as socially disconnected as we are now, we are a “cluster of loneliness” and we sacrifice spontaneous and genuine conversations through WhatsApp texts, or superficial messages on social networks.

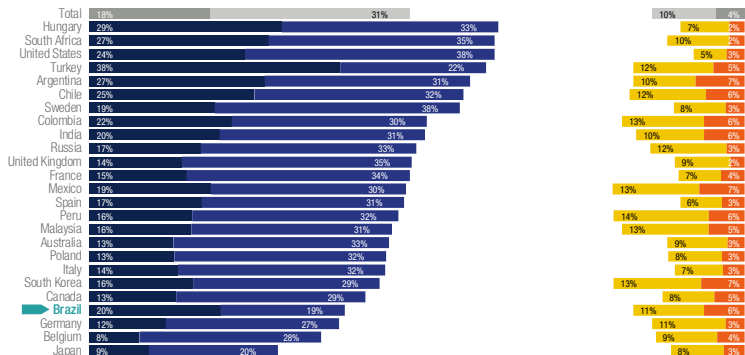
Interacting on Facebook, for example, we are protected by algorithms from opinions that are very different from ours, or that we consider unpleasant. Every day we feed on custom feeds with content that interests us and on points of view that strengthen our own. And in the online life we are active, distancing ourselves from each other, often without realizing it.

The Ipsos global survey Crossing Divides - A World Apart, heard the opinion of 19,782 adults in 27 countries, revealing that 32% of Brazilians believe that it is not worth trying to talk to people who have different political views than their own, and 39% say that it is unlikely that anyone with opposing political views will change their mind regardless of the evidence presented.

Now thinking about the people in your country with opposing political views to you, to what extent do you agree or disagree with the following? They're not worth trying to have a conversation with.

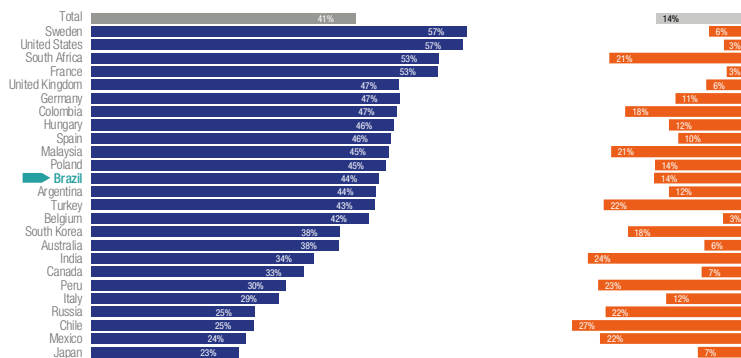


Now thinking about the people in your country with opposing political views to you, to what extent do you agree or disagree with the following? They're unlikely to change their opinion, regardless of the evidence presented



The survey also reveals that in Brazil and in the world there is a worrying perception that society is more endangered today than it was 20 years ago, because of differences in political opinions: 44% of Brazilians agree with this statement, compared to the global average of 41%.

Do you think [COUNTRY]'s society is more or less at danger because of divisions between people with different political views than what it was 20 years ago or is it about the same?



This data reinforces the idea that the internet to this day has not delivered the promise to broaden the dialogue between different people. On the contrary, it seems to contribute to a more polarized and less tolerant society.

BACK TO THE REAL WORLD?

Digital Detox has been manifesting itself in the context in which our perception of loss seems to become more visible; that the benefits of digital interactions bring a cost that we need to reflect on. From the notion that being so connected in the digital environment we feel more disconnected from each other, isolated, more anxious and depressed. We are slowly realizing that technology has taken time and space from our lives that we would like to recover.

In the sphere of Basic Education, the use of the cell phone in the day-to-day of students has been problematized. While its use for educational purposes can benefit learning in the classroom, it worries the observation that many

children naturally replace socialization with their peers with the cell phone screen. In this way, they isolate themselves from interactions that should be natural in the offline world, and which are so important to building empathy.

In France, it was announced as a public health measure that elementary and middle schools should ban the use of cell phones throughout the school period. Smartphones are regarded as the great villain of the psychological health of children and adolescents, and of their school performance.

“NOWADAYS, CHILDREN DO NOT
PLAY ANYMORE AT RECESS TIME.
THEY JUST STAND ALL IN FRONT
OF THEIR SMARTPHONES. FROM
AN EDUCATIONAL POINT OF VIEW,
THIS IS A PROBLEM”.

JEAN-MICHEL BLANQUER,
FRENCH MINISTER

The issue also gained visibility when one of Facebook’s founders, Sean Parker publicly acknowledged the harmful effects generated by the social network. He assumed that Facebook and other social networks are only successful because they “exploit a vulnerability of human psychology.” He even suggests that people stop using the network altogether:

“THIS IS A MOMENT IN TIME
WHEN PEOPLE HAVE TO BREAK
AWAY FROM SOME OF THESE
TOOLS AND THE THINGS WITH

WHICH THEY ARE ACCUSTOMED.
THE DOPAMINE-FOCUSED
SHORT-TERM FEEDBACK CYCLES
WE CREATE ARE DESTROYING
THE WAY SOCIETY WORKS ... WE
ARE REWARDED WITH THESE
SHORT-TERM SIGNS: HEARTS
AND LIKES. AND WE MISTAKE
IT FOR VALUE AND TRUTH. AND,
IN FACT, THAT'S A FAKE AND
FRAGILE POPULARITY”.

Despite more alarming statements such as this, many manifestations of Digital Detox do not indicate a desire for flight from technology recapturing the analogue past, but they bring out the need for more conscious, balanced use, and a more careful and close look at effects that we naturalize with the use of digital media. When we deal with psychosocial disorders like FOMO today, the discussion of conscious use is timely.

FOMO - Fear Of Missing Out: “The desire to remain continually connected with what others are doing, triggered by a widespread apprehension that others may have rewarding experiences from which they are absent.”

In 2018, Vivo launched the “Have time for everything” campaign, focusing on the importance of using technology more consciously. The commercials show moments in which it is more important to live in the present, connecting in person with friends or family instead of connecting with social networks or with the digital world.

Also in 2018, pop singer Tiago Lorc published on his Instagram for its 2.7 million followers, that he needed a break from social media:

“TODAY I SAW MYSELF WITHOUT CERTAINTIES AND I FELT OLD, ONLY THE OLD CANNOT BE SURE OF WHAT A DREAM IS. I CONCLUDED THAT A BREAK WILL DO ME GOOD. BE ABSENT FROM OUR “INSTAGRAMIC LIFE” THAT IS SO TIME-CONSUMING AND ALLOW MYSELF TO LIVE WITHOUT CALCULATING EVERYTHING SO MUCH, TO DISCOVER MYSELF IN NEW FEARS, COMING BACK TO BE SURE OF WHAT IS UNLIKELY. IT’S JUST FOR THIS THAT I’M STILL ALIVE”.

In January 2019 the singer completed one year of “disappearance” in the digital world.

Another interesting move is the emergence of what has been called “anti-tech tech”. The app “Hold” is one example. Launched in the UK, it targets university students with the purpose of helping them spend less time on their smartphones, by rewarding them for time of inactivity.

The positive side of this type of initiative is to see how the theme is grounding, and there is still space for brands that want to “embrace” the idea and communicate it. As we follow how the digital detox movement materializes in people’s daily life, we should take a moment to reflect on: how much are we sacrificing our personal relationships for the dependence we create from our digital interactions?



SONG

AQUARELA DO BRASIL

Brazil, Brazil Brazilian man
My mulatto inzoneiro
I'll sing you in my verse
Brazil, samba giving
Which is swaying waddle
Brazil's love
Land of Our Lord
Brazil! Brazil!
Me ... Me ...

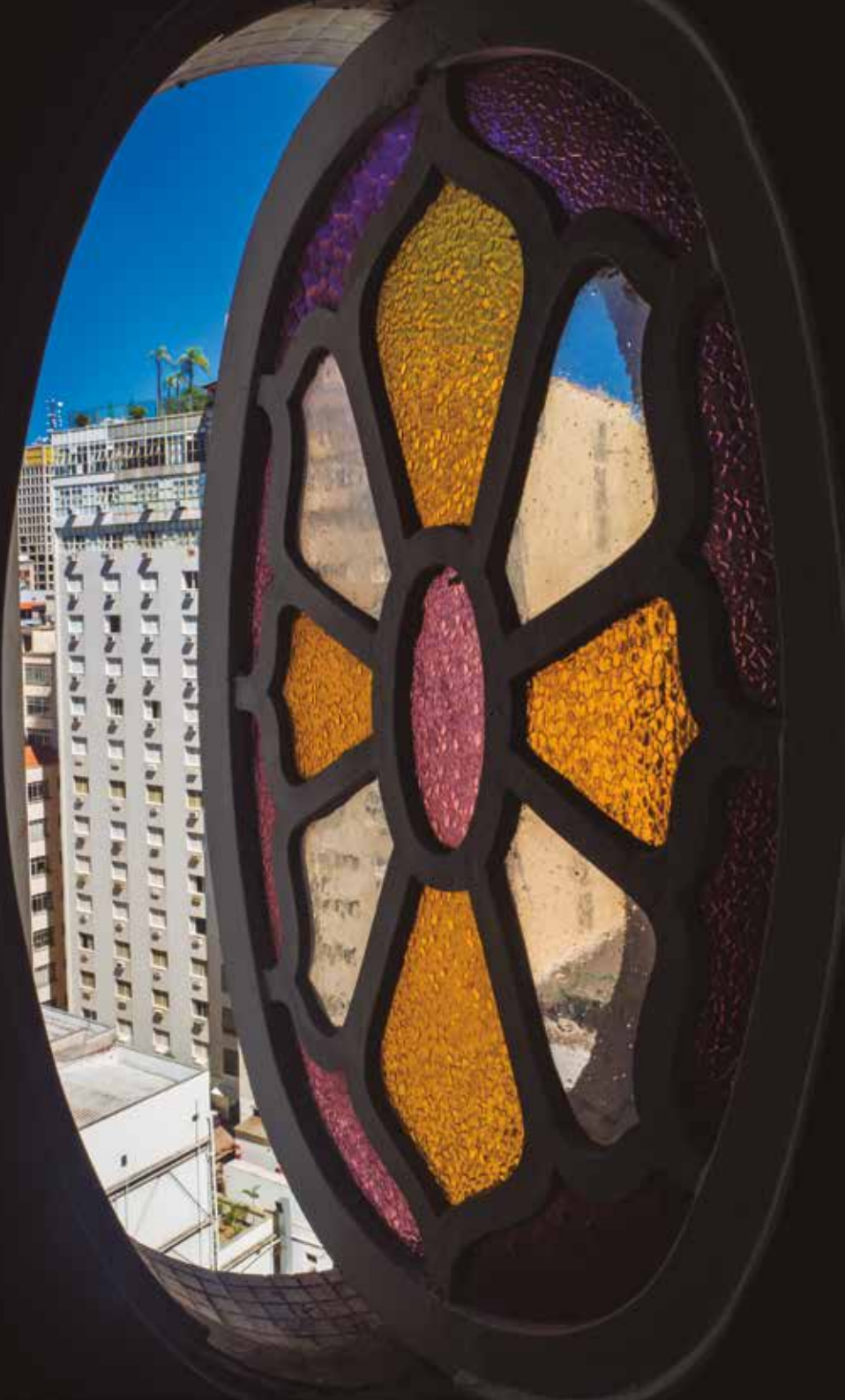
Hey, open the curtain of the past
Take a black mother of cerrado
Put the king in Congo Congo
Brazil! Brazil!

Let the bard sing again
In light of the moon merencória
The whole song of my love
I see this lady walking
Lecture by dragging
Your dress enveloped
Brazil! Brazil!
Me ... Me ...

Brazil, land good and tasty
The cute brunette
To look forward
Brazil green giving
For the world to admire
Brazil's love
Land of Our Lord
Brazil! Brazil!
Me ... Me ...

Hey, that gives this coconut coconut
Where Hi ties my network
In the clear moonlight nights
Brazil! Brazil!

Hey, hi these sources murmurous
Hi where I kill my thirst
And where the moon is playing
Hi, this beautiful and swarthy Brazil
My Brazilian Brasil
Land of samba and tambourine
Brazil! Brazil!
Me ... Me ...



CONCLUSION



WHAT WILL BRAZIL LOOK LIKE IN 2020?



Sandra Zlotagora Pessini,

Communications



Yves Bardon,

Ipsos Flair Program Director – Ipsos Knowledge Centre

A few years ago, a non-Brazilian would have answered this question with some recurring clichés about the country: samba, carnival, football, Amazon, beaches, sculptural bodies – or with other more negative images such as crime, violence, drugs and corruption.

Nowadays, Brazil's image is much more than that.

The information that arrives through international press agencies and social media advance those stereotypes and projects a new (fragmented and complex) image of Brazil.

In recent years, other topics have entered the agenda regarding “Brazil outside Brazil”, such as religion, moral values, deforestation, Dengue, Chikungunya, Zika, measles, strikes, politics, etc.

The election of the far right with the controversial figure of President Jair Bolsonaro illustrates this phase (full of paradoxes) of accelerated changes. One day, Brazil confirms the COP 21 contract to improve the climate. On the other hand, we learned that a preserved forest area equivalent to one million football stadiums was eliminated from the map in just one year. One day, a Brazilian transgender model is the new face of Victoria's Secret. In the other, it is reported

CONCLUSION

the life expectancy for someone in Brazil who is transgender is only 34. This is coupled with the fact more trans people are killed in Brazil than in any other country.

There is a widespread desire for a different, disruptive future, largely due to the transformation technology drives and to the rise of individual freedom as a strong value that is felt across all generations and social classes.

We live in the age of the individual. The consumer society thrives when everyone feels unique and wants products made for them. Everything seems to be joined to make people feel freer than before, which also flatters the narcissism and adoration of each individual's selfish personality.

But at the same time, there are tensions related to the resignification of institutions, questions and fears, and a nostalgic attachment to the past. Brazilians seem to hesitate between the "comfort" of the retro world and the fascination with the techno-future, therefore living the future of yesterday.

Deep inside, some Brazilians already have understood that nothing will be the same as before: instead of navigating between a past that no longer exists and an uncertain future, they want to have a positive impact on the present to prepare themselves for the future – a real and tangible future, a desirable future.

We have two illustrations of this "mindset" transformation:

- Brazil abandoned the use of plastic straws in its two largest cities in record time, to minimise the pollution of the oceans.
- The country became the second largest market in the world for the mobility app Uber – just behind the United States – even though criminality and lack of security are still pointed out as one of the topics that concern Brazilians most.

These two examples demonstrate the ability that Brazilians have to amaze and do unimaginable progresses in a short period of time.

And for this reason, it is necessary to focus on the present, to create a Brazilian society and reality that Brazilians want.

Although this current scenario is more a fragmented mosaic than a fluid watercolour, a top-down-top, a new world is being drawn and it opens new ways for Brazilians to become protagonists of their own future.

Sandra Zlotagora Pessini & Yves Bardon
August 21st, 2019



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ENDNOTES

ENDNOTES

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ENDNOTES

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Av. Nove de Julho, 4.865, Tower A - 7th floor

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ISSN XXXX-XXXX

Production: dumpa creative and fast solutions

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Ipsos editions: October 2019

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