

BRAZIL 2022

GAPS & BRIDGES



IPSOS
FLAIR COLLECTION

GAME CHANGERS



BRAZIL 2022: GAPS & BRIDGES

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IPSOS FLAIR: UNDERSTAND TO FORESEE



Henri Wallard,
Deputy CEO

Brazil has paid a heavy price for the Covid-19 crisis. Our new edition of Ipsos Flair is published in a difficult context, a few months ahead of the presidential election of 2022.

What will remain of this period which officially began when a first patient was tested positive on February 25, 2020? Today the country is even more fractured, inequalities are even more evident, the outlook is even bleaker. Pessimism is no longer in hiding, and nobody imagines that things will get better in 2022.

The *raison d'être* of Ipsos Flair is to be an international publication that analyzes the values and attitudes of consumer-citizens which shape what they think about all actors of society (brands, advertising, businesses, media, politicians...), providing substantial analysis and recommending the best strategies. Flair is also developed in China, Colombia, France, India, Indonesia, Italy, Kingdom of Saudi Arabia, Mexico, Peru, Russia, South Korea and Thailand.

Flair is about instinct and intuition, the ability to capture the atmosphere of a country, to anticipate the road ahead, and to know when and where to act. It is also another way of looking that considers survey results as sociological symptoms to understand the true relationship between people and everything around them.

Breaking away from stereotypes, Flair affirms Ipsos' intellectual leadership, freedom of spirit and competence of its experts through:

- Analysis of motivations and expectations of consumer-citizens;
- Exploring key topics;
- A selection of successes and examples for strategists.

By bringing together diverse and complementary perspectives, the Ipsos Flair series helps our clients to formulate and to fine tune strategic planning approaches. Flair is a precious tool in line with Ipsos' positioning: "Be sure. Act smarter".

Enjoy your reading!

EDITORIAL



Yves Bardon,

Ipsos Flair Programme Director

In all countries globally, Covid-19 has been an eye-opener and an accelerator. In Brazil in particular, the crisis created by the virus has shown the real situation of the country, the health system in particular, the state of infrastructure, other social, economic, technological and cultural disparities.

Brazilians are paying dearly for the crisis, even though, as of September, Brazil was the world's fourth most vaccinated country.

On the mental level, an increasing level of anxiety makes Brazil one of the countries where people now consume the most antidepressants. Doctors are beginning to describe this phenomenon as a second pandemic, and the WHO (World Health Organisation) speaks of "pandemic fatigue" on a global scale, with effects of nervous fatigue or mental exhaustion, which can result in anxiety, insomnia, panic attacks.

Socially, Brazil was already one of the countries with the most inequalities in the world and the crisis did not create more cohesion, on the contrary, it has made unstable work even more precarious; and has brought back hunger for many families, a situation that was masked for a time by the government's emergency aid. Everyone has tried to adapt according to their resources and means, but digital inequalities have come to light.

A revealing figure is that 79% of Brazilians believe that things in their country are off on the wrong track (+14 points compared to the global average).

On the psychological level, in September, the Ipsos Global Consumer Confidence Index² showed that Brazil is the country where the index has deteriorated the

most globally since January 2020. It is easy to explain why: unemployment, inflation, health crisis, political crisis, divisions between supporters of the current President and those of former President Lula (the two candidates for the presidential election of 2022)... a climate of uncertainty from all points of view.

Our title for Ipsos Flair Brazil 2022, Gaps & Bridges, reflects what is out there and what needs to be done. Gaps, because the country is fractured, pessimistic and unstable. Bridges, to (re) create links.

This link is very concrete, with the deficit in the current state of infrastructure to be filled in. There is another aspect that is also very human: we will not emerge from the crisis as we entered it. The wounds and the disruptions have made us want something else. Those who manage to achieve change will in turn influence the values and expectations of others.

In terms of health, even in a violent country like Brazil, where death is omnipresent³, everyone could feel like the possible victim of the virus. In May 2021, the death of Paulo Gustavo at the age of 42, the beloved Brazilian humorist and figure of the LGBT community, shocked the country and revived criticism against the management of the pandemic

In terms of identity, everyone could see that certain people suffered disproportionately simply because they were black⁴, transgender, female, indigenous, child, poor, etc. In November 2020, the death of Joao Alberto Silveira Freitas, beaten up by white security agents, shook Brazil and put the issue of racism at the center of society.

Either way, maybe this is the end of "*jeitinho*", that attitude of adapting, composing, arching back, between fatalism, denial and survival tricks⁵. And the end of "*jeitinho*" is the birth of the desire to be considered, in terms of services and values. Services with everything that corresponds to the real life of people (drive, home delivery, personalization) and values with the aspiration to be recognized as we are, individually and collectively, which represents a fantastic opportunity for brands to show their closeness to the life and values of their consumers.

A philosophy of putting oneself in someone else's position, with empathy, attention, and respect, is today the attitude that we expect from authorities, encompassing companies, brands and advertising. By starting from the reality of consumers' lives, showing that they really understand them, providing real solutions. This is the best way to create bridges across the current gaps into 2022.

References:

1. This 28-country Global Advisor survey was conducted between August 20th 2020 to September 3rd 2021 via the Ipsos Online Panel system among 20,012 adults aged 18-74 in Canada, Israel, Malaysia, South Africa, Turkey and the United States, and 16-74 in all 21 other countries.
2. Refinitiv/Ipsos' Primary Consumer Sentiment Index (PCSI) collected in a monthly survey of consumers from 24 markets via Ipsos' Global Advisor online survey platform.
3. 70,000 Brazilians die a violent death each year according to the study published by the Small Arms Survey (2017)
4. According to the Coalition Solidarity Brazil report, in 2019 more than 6,000 people were killed by police, nearly 80% of them black. This figure reflects official data only, excluding militia-related deaths and disappearances.
5. Olivier Guez, *Eloge de l'esquive*, Grasset, 2014 (In praise of dodging)

POINT OF VIEW



Marcos Calliari,
CEO of Ipsos in Brazil

END OF CHAPTER

At last, 2022 will not have Covid-19 as its main protagonist. At the time of writing (October 2021), the prospects are end-of-chapter. The sad figure of more than 600,000 deaths to date and 21.4 million (in Brazil alone) are slowing down. end of the year, most adults and adolescents will have been fully vaccinated in many states, and older people will have received their third, booster dose. Global Ipsos surveys shows Brazil to have an overwhelming majority of the population willing to get the Covid-19 vaccine as soon as possible.

We see concern about the pandemic reducing in this country and around world. Our What Worries the World survey shows the percentage of Brazilians concerned about Covid-19 has been dropping steadily (from 59% in June to 36% in September). This was the first month since the beginning of the outbreak, that Covid was surpassed as Brazilians' top concern. Poverty & Social Inequality, with 40%, ranked first with Covid in second, tied with Political Corruption (34%). This reflects a broader trend in which apprehension about the pandemic is beginning to give way to these problems that have lost visibility, but have remained always present on the population's agenda.

Obviously, this does not even remotely mean that Covid-19 is over: it is not, and coexistence with the virus and the disease will be long-lasting, perhaps even permanent. But life will have some air of returning, even if it is to a place that never existed.

The challenge then becomes identifying the themes, behaviours and beliefs that will guide people, institutions and companies - and this has been the main concern of our clients and partners in recent discussions.

PEOPLE AS PRIORITIES

Brazilians have been particularly hard hit by the pandemic as we have seen on several occasions in our monitoring of populations around the world since the beginning of the crisis. They have been impacted in terms of health and financially. Some 76% believing that it will take two or more years for the country's economy to recover post-pandemic. The negative emotional effect has been clear with Brazil leading all global rankings rankings for anxiety, loneliness and unhealthy habits.

We attribute this not only to the direct lived experience of Brazilians who faced loss in many ways, but also the idiosyncratic and turbulent information ecosystem, as discussed in last year's edition of Flair Brazil.

Even though the State has strengthened its protective role globally, through economic initiatives to support families and companies and provider of life-saving vaccines, in Brazil, the confusing processes surrounding both roles gave a feeling of helplessness. Organisations and brands saw that understanding people (as individuals and not only consumers) and helping them to navigate new times, providing information and comfort, was everyone's responsibility. It happened all over the world, but in Brazil, process was more intense and necessary.

In this context, the social themes carry great importance and urgency in a in a country that harbours unresolved conflict and unmet needs. 2022 will be merciless with injustices, lack of empathy, and environmental disregard or negligence.

Navigating this scenario of such essential agendas, we will address the strengthening of diversity and inclusion, the gaps between saying and doing when it comes to sustainability news and cancel culture, and, of course, some

perspectives on the election year.

ACCELERATIONS, IMPACTS AND EXCLUSIONS

Understanding the lasting impacts of the accelerations caused by the pandemic is the primary concern of this publication. Many issues need our attention in this new chapter.

Many aspects of our lives have been altered, but few represent a break in behavioural trends. The more intense digitalisation of processes and relationships, for example, brings enormous consequences for everyone.

At the same time, people's new routines, with fluid boundaries between the personal and the professional, the private and the public, will make established rules and demands more complex - such as with working hours and workplaces. It seems that protocols and health concerns will not be overcome, even if transformed. Highly correlated with health, environmental concerns are intensifying, and the topics of sustainability and wellbeing are more prominent, as shown in Ipsos surveys.

In the corporate world, the attention given to employees, advocates and stakeholders will demand more intelligence and investments from organizations.

There will also be exclusions in a new beginning; groups of individuals, entire categories of products, brands that have not yet found their place. This is not only a question of digital inclusion or economic access, but many possible peculiarities in a complex society.

LISTENING TO UNDERSTAND

Ipsos' obsession with being close to the population and understanding their moments lives is evident and visible in the various surveys and studies we undertake all over the world. This has particular emphasis in Brazil. Here, not only has our research team been participating more and more in the planning

and decision-making processes of our clients and partners, but we are also seeing greater coverage in the media as we seek to contribute reliable and relevant information that helps everyone understand the times we are in and the ways forward.

The publication of Ipsos Flair Brazil 2022 represents yet another effort that we are very proud of: to address topics with objectivity - a truly essential condition for action in 2022. This makes us all capable of not only reacting to the challenges, but also helping to write a different story, a new chapter.

This paper embodies the challenges that Ipsos has chosen to address and that clearly shows the qualities of our researchers: curious honest, dedicated, passionate, active agents in society and with our clients and partners. We hope that you find reading these articles inspiring.

Enjoy your reading!



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“WHILE EVERYONE WAITS FOR THE
CURE OF EVIL AND THE MADNESS
PRETENDS IT IS NORMAL
I PRETEND TO BE PATIENT”.

LENINE. *PATIENCE*



SCENARIO

Trump



2020

KEEP AMERICA GREAT

POLITICS: WILL THERE BE A COUP? WILL THE VACUUM LEFT BY TRUMP BE REFLECTED IN BRAZIL?



Mateus Pinho,
Brand Health Tracking

“THE CRISIS CONSISTS PRECISELY
OF THE FACT THAT THE OLD ARE
DYING AND THE NEW CANNOT BE
BORN; IN THIS INTERVAL, A WIDE
VARIETY OF MORBID SYMPTOMS
APPEAR.” ANTONIO GRAMSCI¹

WHERE WE CAME FROM AND WHERE WE ARE

The brief Twentieth century was a century of profound transformations in humanity and international politics, as described by historian Eric Hobsbawm in his book *Age of Extremes*.²

Born at a time of intense industrialisation of modern society, the 20th century was first characterized by crises, wars and revolutions that transformed society in a unique way. In a second part of the century, post-war capitalism experienced a golden age which would last until the crises of the 70s and 80s throughout the counterculture movements in America, France, and later to democratic mobilisations in Latin America.

At this time, progressive social visions concerns about the the global economy circulated around the world. From the Soviet collapse in Eastern Europe, a new world order emerged in the 1990s, characterised by the advance of neoliberalism, in which austerity plans were allied to the modernisation and greater efficiency of democratic states.³

For many thinkers around the world⁴, the predominance of this global consensus in economic policy, which has lasted 40 years, limiting citizens' rights and undoing the foundations of the welfare state, is now facing a new challenge to its legitimacy in which voters no longer believe in the pillars of the current democratic regime.

The crisis of representation and the questioning of institutions caused a kind of emptying of democracy itself in order to make room for new political currents around the world, especially in rise of the extreme right.

In questioning every kind of democratic institution in power, exalting traditions in the face of new ways of living, and aligning with the most conservative aspects of religion, the electoral base of the far right has similarities with its peers from the old twentieth century.

Although history does not repeat itself like-for-like, philosopher Hannah Arendt's theory of totalitarianism in the 20th century⁵ provides us with elements to understand the regressive thinking taking over important sectors of society today.

The conservatism of the 1930s in Europe was based in large part on those who did not share the same sense of belonging to society; soldiers returning from war who no longer fit into their world, unemployed people who could not find work, bankrupt entrepreneurs, and so on.

EXCLUDED, INTEGRATED, PROFITEERS

This sense of non-belonging feeds a large part of those excluded from the benefits of the neoliberal order, such as precarious workers and the poorest segments of society.

But social frustration goes beyond the economic to also permeate parts of the upper classes. The democratic movements against oppression, which erupted in the last fifteen years and are transforming society, exert a certain subjective “threat” to the sentiments of the more conservative sectors. Social strata that were previously comfortable with the current status quo, now perceive feminist, black or LGBT mobilisations as threats to their traditional environment. As a result, they seek to preserve that security they felt in the world they knew before, where their authority was not questioned and their customs could be expressed without so many confrontations⁶.

One way to preserve this previous order, even unconsciously, is through voting, which has led to political polarisations in different parts of the world. Ipsos’ study on culture wars around the world showed that eight in 10 Brazilians believe that there is ‘much’ or a ‘considerable amount’ of tension between people who support different political parties in Brazil today.⁷

In this context of political and social crises, far-right governments were elected in important democracies around the world, including Brazil and the USA. In addition to the subjective and objective issues of the far-right electoral bases, their political expression bears resemblance to the conservative regimes of the last century: the questioning of democracy from within itself.

TRUMP & BOLSONARO: DEMOCRATIC INSTITUTIONS UNDER SUSPICION

Donald Trump was elected in 2016 by the Republican party after an electoral process marked by the spread of fake news and a deep polarisation of American society.

Many analysts have investigated the strengths of the “Trumpist” discourse and identified some central elements. Firstly, the arguments depart from economic issues, in which Trump resonated the idea that an emerging “precarious class” or a “compressed middle class” would lose ground in the face of an increasingly globalised and automated economy (the so-called “anti-globalist” discourse).

Trump’s other successful arguments are based on the authoritarianism of his electoral base; conservative sectors and potential “authoritarians by nature”, desiring order and certainty in a new world full of threats to their customs and ideology. Finally, analysis has also pointed out that Trump appealed to the populist and anti-elitist tendencies. With a significant portion of the population believing that the system is broken, the environment becomes ripe for a populist adventurer like Trump.

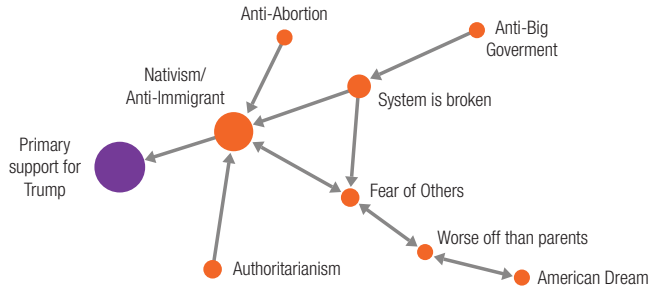
At Ipsos, studies conducted between 2015 and 2016 showed that Trump’s true strength was heavily based on his nationalist and anti-immigrant rhetoric. The strong narrative of “America first” resonates naturally with the Republican base and, when toned down, can find even broader popular appeal in the United States.

In other words, Trump explored a deep fear that America’s best days are in the past, causing a yearning for what the country once was and giving rise to a fear of the “other”, the immigrant and those who are in various ways “different”.

In the election year, our study demonstrated, through logistic regression and Bayesian analyses, that several of the explanatory factors occurred from the perspective of nationalism. That is, it was through the nationalist and anti-

immigrant sentiment that Trump's supporters expressed factors such as conservatism, the feeling that the system was broken, and that their lives would be worse than their parents', among other factors⁸.

Nativism drove Trump support in primaries



Shortly after Trump, in 2018, Jair Bolsonaro was also elected in Brazil in an environment of polarisation, triumphing over his opponent in the PT, a consolidated left-wing party in Brazil, with 55% of the valid votes in the second round.

Both show many similarities but also have important differences. Both Trump and Bolsonaro were elected as outsiders to the establishment and as presidents they questioned the existing democratic regime from within, for example the supreme court. Both were governments marked by this characteristic of questioning the current regime and giving “polarizing” speeches, evoking a tone of campaigning against their opponents despite already governing.

Their similarities and connections run from their bases to their speeches and ways of governing. It was common to see the two presidents constantly testing the superstructural balance of forces, measuring how to gradually increase their power, testing the regime without losing the support base they had already won.

Both presidents had a very similar semiotics of speech, with propagation of fake news, defense of conservative agendas, attacking oppressed sectors, radicalising their base against democratic institutions, questioning electoral

processes, and, finally, denial and obscurantism facing the pandemic that exploded during their governments.

TRUMP'S DEFEAT: PANDEMIC, BLACK LIVES MATTER AND POLARIZATION

The pandemic, so devastating in the US, was undoubtedly a decisive factor in Donald Trump's defeat this year. Democratic Party candidate Joe Biden campaigned for the fight against Coronaviruses through mass vaccination and stimulating the economy through Keynesian matrix incentives⁹.

In addition to the inefficient and controversial management of the pandemic, other elements were fundamental to Donald Trump's defeat, such as the Black Lives Matter protests which were greatly intensified after the assassination of George Floyd. On outpouring of outrage was shared around the world while the US president hesitated to condemn racist expressions in American society¹⁰.

Even still, Trump garnered more than 70 million votes, the second highest vote in American history (behind Biden, who was elected with more than 80 million votes) and won in more than twenty states, including Florida and Texas. Therefore, despite the defeat, the continuity of his strength and political polarisation is undeniable.

The US extreme right now appears without direct political representation while the Biden administration is consolidating its governance with mass vaccination and national economic incentives, which in a way may contrast with Bolsonaro's situation in Brazil.

BOLSONARO SUPPORTED TRUMP, BUT IS NOT TRUMP

Donald Trump's departure from the White House brings important elements to the US approximations with Brazil, but differences still prevail.

On the one hand, Bolsonaro and his allies have been like Trump in questioning the electoral process, raising questions about the legitimacy of any result. This saw the US erupt into historic protests and lead to the invasion of the Capitol building, called by Trump on the day his electoral defeat was ratified.

Back to Brazil, Bolsonaro is not Trump, and Brazil is not the US. Military relations, for example, are very different. For Bolsonaro, maintaining the armed forces as an indissoluble part of his government, albeit in a relationship filled with noise and controversy. But this is certainly not a feature of the US, where this relationship is more separate.

In addition, the government's relations with parliament are also distinct. Bolsonaro rules together with the so-called "parties of the centre", which is not the case in the US.

The pandemic experience in both countries points to differences in govern. The Bolsonaro government lost approval during the pandemic, which was also observed in the US, and especially after the end of the 2020 emergency aid¹¹. On the other hand, it has time on its side, with longer between vaccinations – albeit slow – and the electoral period, giving the government a chance to reverse part of its deterioration in popularity.

THERE IS NO VACUUM IN POLITICS: THE FAR-RIGHT AROUND THE WORLD

The idea that there is no vacuum in politics is an idea shared by many political scientists, as something new always occupies space that is left open, even if it is a transitory phenomenon.

We see this with the current crisis of representativeness of democratic regimes around the world. Democracy, which in earlier times was very well established, especially in countries like the USA, today suffers major seismic shocks as a result of wide-ranging questions to the current social order.

Traditional institutions, whether the supreme courts or the mainstream press increasingly losing legitimacy in the eyes of the public.

In this context of deep political questioning, , in countries like Brazil, it is difficult to find an alternative path to the far right, as the opposition remains focused on the party that ruled before Bolsonaro, the Worker's Party, and especially on the figure of the former president Lula. Other attempts, most of them liberal in nature, still could not present themselves to the population as a viable alternative.

This changing dynamic can be felt around the world. Starting from Latin America, Peru recently experienced extremely polarized elections between candidates that were clearly distinct from the left and the right. In Asia, Rodrigo Duterte's far-right government in the Philippines is well known, and is even accused of human rights violations, but maintains high approval ratings.

In Europe, the phenomenon of polarization and the growth of the far right is also widely recognized and since 2017 the continent has witnessed a significant increase in the support base of far-right movements and parties.

In May 2017, Marine Le Pen, of the Rassemblement National, won 34% of the votes in the 2nd round of the French presidential elections, the best electoral result in the party's history so far, despite having retreated in regional elections this year.

In September, the AfD (Alternative to Germany) entered Parliament for the first time with an anti-euro and anti-immigration platform. In October 2017, the FPÖ (Freedom Party of Austria) won 26% of the vote and joined the then governing coalition. In countries such as Portugal, Italy, Holland, Hungary and Sweden, we saw similar movements. Spain too, which shortly afterwards experienced the emergence of the nationalist party Vox. In the regional elections in Andalusia in December 2018, Vox managed to elect 12 regional representatives.

In this way, it is evident that the phenomenon of political transformation that

we are experiencing is quite profound and will not resolve itself from one year to the next. It is a global process where new protagonists are emerging, and the confrontation of ideas is taking place in an increasingly virulent way.

Countries have their own complex specificities, and this is a phenomenon that should still adopt other social and political expressions in the coming years, whether in the dynamics of civil society or in the dispute for elected representatives in governments.

POINT OF VIEW

We cannot yet draw conclusions on these open and evolving topics, as paths of the far right and polarization in the world continue to develop.

However, even in the face of downturns, these phenomena still have enough breath to continue being key elements of the global political situation. After all, a large part of their fundamental issues have not yet had a definitive solution. The discomforts and confrontations between different groups in society or the economic pressure on the middle classes and the most vulnerable that wears down governments. At the same time, mistrust about the establishment, democratic institutions and questioning the status quo continues to be bed in several countries around the world.

It is not difficult to see that we live in a time of transition which will invariably result in a world very different from the one we knew at the beginning of this century.



SOCIETY: DIVERSITY & INCLUSION

In addition to plunging us into an unprecedented health and economic crisis, the pandemic has exposed inequality and a lack of inclusion in all Latin American countries. The most vulnerable populations and communities, whether due to their gender, sexual orientation, ethnicity, age or socioeconomic status, were the most impacted.

What is the role of organizations in this context? How can brands and companies contribute to a fairer world? Why are corporate Diversity and Inclusion policies gaining even more strength in this context?



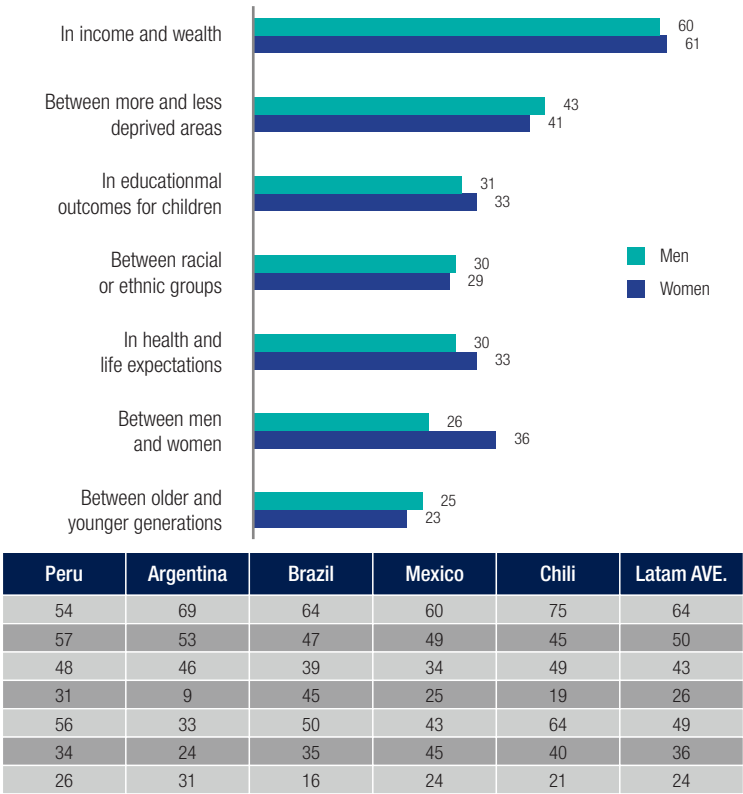
Sandra Zlotagora Pessini,
MarComs

WHAT MANY DID NOT WANT TO SEE WAS ABSURDLY VISIBLE DURING THE PANDEMIC

Covid-19 has redrawn more sharply inequalities in income, geographies, education, race and ethnicity, life expectancy, gender, and between generations.

In Latin America, Brazil leads in the public perception of income and racial inequality, Peru in geographical origin, Chile in education and life expectancy, Mexico in gender, and Argentina between generations.

Which of the following types of inequality, if any, do you think are most serious in your country? (Global country average, %)

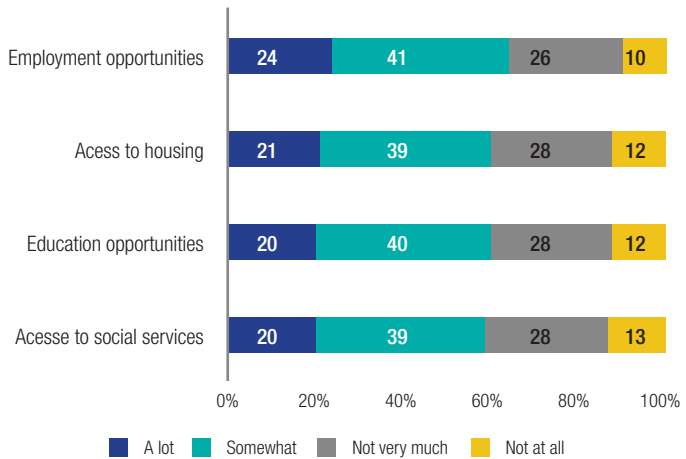


These inequalities obviously impact consumption, access to products, services and opportunities, and essential social services that should be universal, according to the countries' own constitutions.

Ethnicity and national origin are, for example, perceived to have a very strong impact on employment opportunities, housing, education and access to health systems. And, once again, we must remember that the pandemic has

given double importance to these four areas. Unfortunately, Brazil leads the inequality ranking, closely followed by Chile. Only Argentina is below the Latin American average in all aspects.

Perception that a someone's ethnicity/national origin impacts their opportunities (Global country average, %)

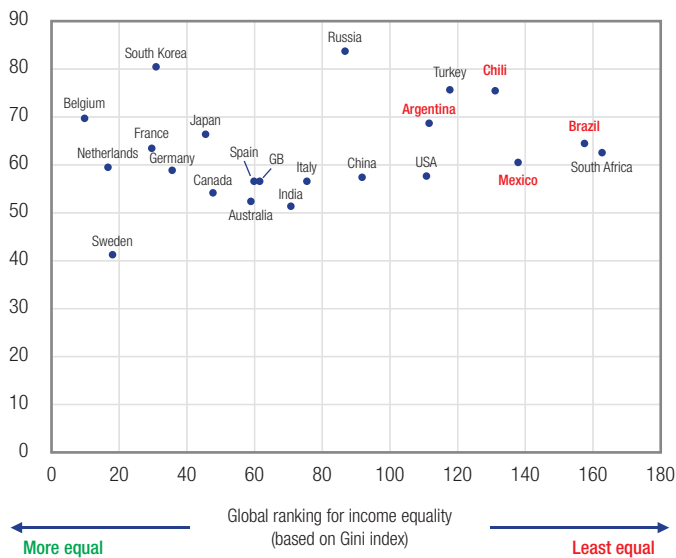


Peru	Argentina	Brazil	Mexico	Chile	Latam AVE.
66	59	71	64	69	66
58	48	66	56	66	59
63	56	68	61	68	63
65	55	68	67	66	64

And here, we are not just talking about perceptions, as there is very strong alignment between the perceptions of the people interviewed and the reality of economic inequality as measured by the Gini index, which calculates the degree of concentration of income in each group.

This correlation is a positive thing because, to solve a problem, the first step is awareness: realising that it exists.

Selected country's ranking for income equality vs % who say income inequality is one of the most serious types of inequality in their country

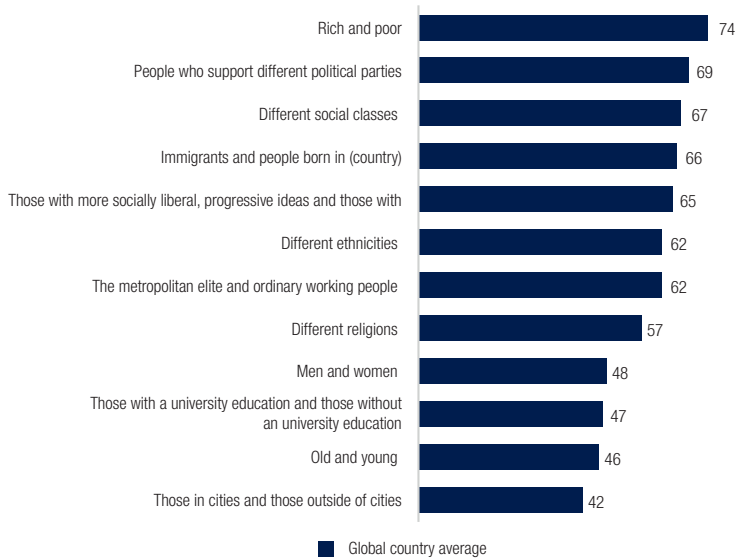


DANGERS OF A LACK OF SOCIAL COHESION

Inequalities create a less inclusive, more divided, and less cohesive society. It is one of the clear consequences of growing polarization and the weakening of the collective.

Globally, inequalities in income, social class, immigration, ethnicity, geographic origin, gender and education are identified as causes of social tensions.

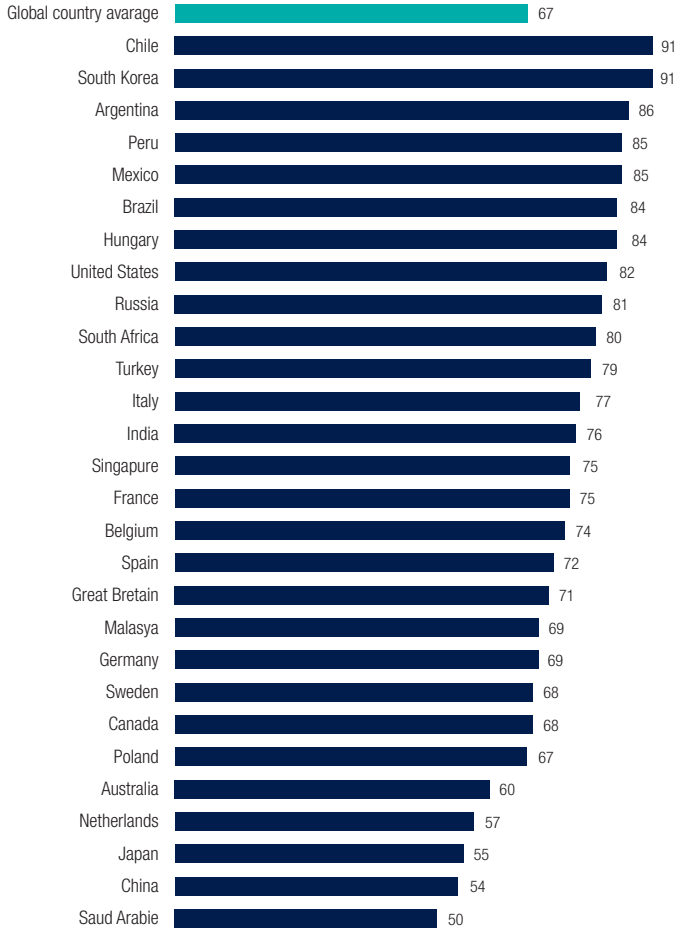
How much tension, if any, would you say there is between [...] in your country today? (%)



And, looking more specifically at the difference between the rich and the poor (the inequality that people across 28 countries identify as the number one cause of tension in their country), we find that Chile leads the global ranking, with 91% of Chileans saying that income inequality creates 'a considerable amount' or 'a lot' of tension in society.

Argentina is at 85%, Mexico and Peru are both at 84% and Brazil at 79% – all above the global average (74%).

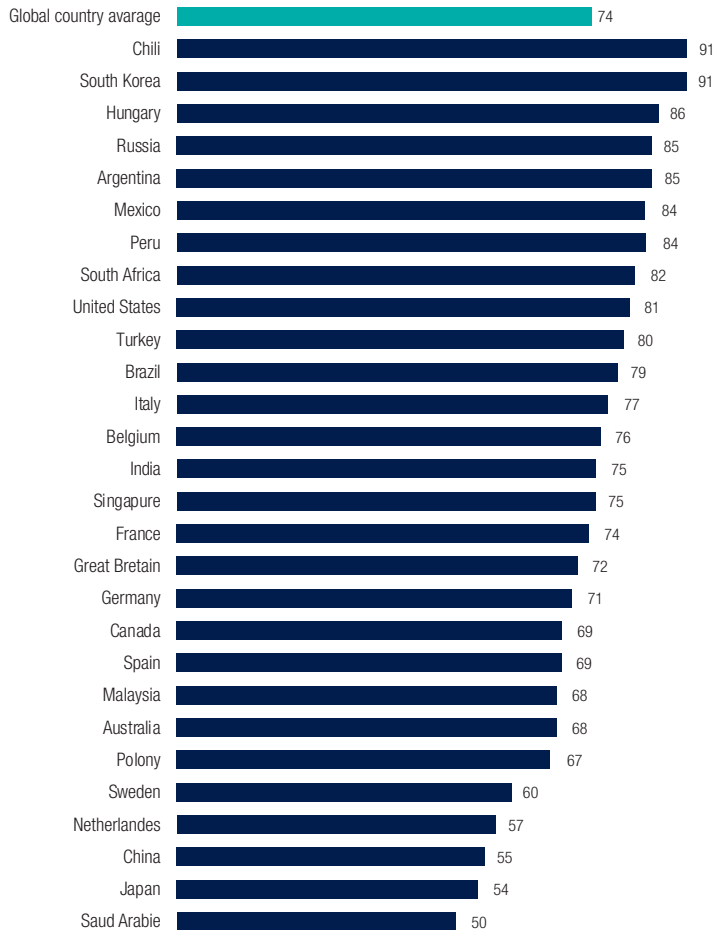
How much tension, if any, would you say there is between different social classes in your country today? (%)



The same thing can be seen for social classes in Latin American countries. Chile, once again, leads the ranking of the 28 countries surveyed, with 88% of Chileans stating that belonging to different social classes creates a considerable

amount or a lot of tension. Argentina (85%), Peru (81%), Mexico (80%), Brazil (77%) are close behind – all well above the global average (67%).

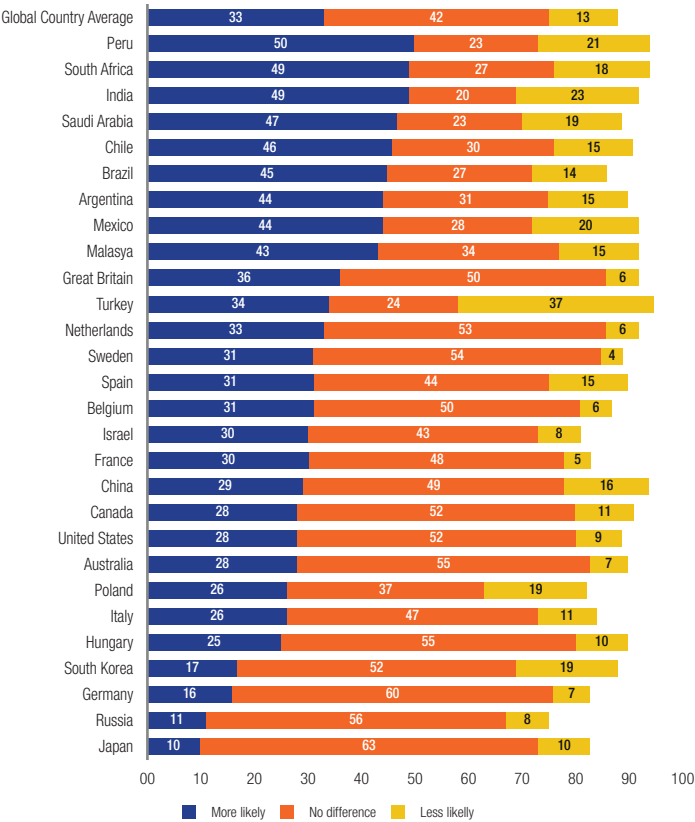
How much tension, if any, would you say there is between rich and poor in your country today? (%)



REACTIONS TO INEQUALITIES
AND SPACE FOR THE BRANDS TO ACT

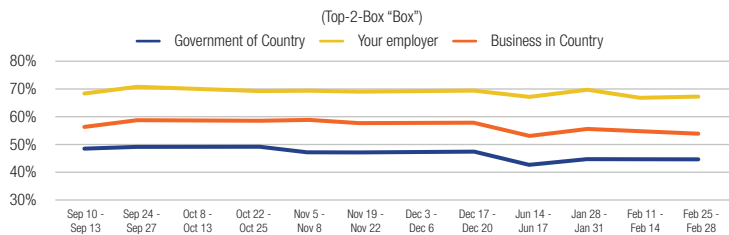
At this moment of extreme vulnerability for our populations, with the pandemic devastating Latin American countries, people declare themselves much more open to helping others in the community. Among the eight countries at the top of the ranking, six are from the region.

Help others in my community... (%)



Another interesting point is that people clearly see that brands have performed positively during the crisis, creating the need for them to play a more active role in economic recovery and social issues. When we ask people to assess the performance of governments and businesses during the pandemic, the latter come out far better than the institutions that govern our countries.

Performance of Government, Employers & Businesses



The importance of companies and brands as agents of social transformation has been growing for some time now. Due to their weight in the economy and influence in driving new behaviors and social habits – think of the “uber-isation” of the economy and the explosion of delivery services in almost all countries during the pandemic – companies exert considerable influence on society. They are increasingly expected by people, not only as consumers but as citizens, to bring about positive changes in the world.

In June, we celebrated LGBTQ+ pride month around the world, a community that has suffered and still suffers from exclusion and violence in everyday life.

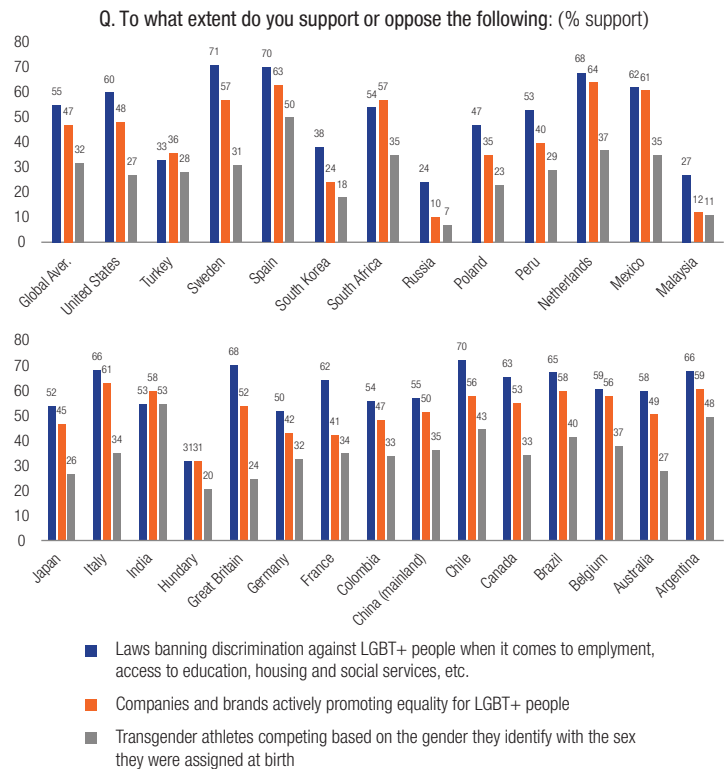
Our Ipsos Global Advisor survey in 27 countries shows that 55% of respondents worldwide support laws that prohibit any and all forms of discrimination towards the LGBTQ+ community, e.g. in relation to employment, housing, education, and social services.

In Chile, 70% support these laws, placing the country among the three most favorable after Sweden and tied with Spain. Argentina (66%), Brazil (65%),

Mexico (62%) show above global average levels of support while Colombia (54%) and Peru (53%) are in line with the global average.

Furthermore, nearly half (47%) of global respondents think companies and brands should actively support equality for the LGBT+ community. This support is much greater in Mexico (61%), Argentina (59%), Brazil (58%) and Chile (56%). Colombia's respondents (47%) are level with the global average while Peruvians (40%) are more reserved about this support.

Even so, we see that a majority of Latin American respondents expect companies and brands to take a stand and define an action plan for greater inclusion of the LGBTQ+ community.



And what was not lacking during the month of June this year were companies publicly supporting LGBT+ pride. We saw employees raising awareness, rainbow flags framing company logos, LGBT+ advocates featuring in brand advertising campaigns.

OPPORTUNISTIC COMMUNICATION OR REAL ENGAGEMENT FOR DIVERSITY AND INCLUSION?

There are people who are more skeptical about Diversity and Inclusion, seeing it as more a “marketing” stance for brands than anything else (which takes a pejorative view of marketing).

Ipsos research, as shown in this article, goes against these arguments. There is an awareness, both in Latin America and in the rest of the world, about the inequalities that exist and exclusionary patterns that remain. There is a clearly expressed willingness to see companies engage in a positive transformation of society, and in this way embrace Diversity and Inclusion.

In this area, we see several interesting initiatives in all Latam countries ranging from recruitment processes, e.g. trainee vacancies exclusively reserved for black people by Brazilian retail giant Magalu to advertising campaigns that are increasingly representative of society across the country, with the likes of Avon, Coca-Cola and Nike capturing a range of ethnicities, colour, gender, sexual orientation and so on.

Also deserving a mention are Brazilian companies such as Bradesco bank or Sodexo that have worked to combat violence against women, which increased dramatically during the pandemic and its periods of confinement.

SCENARIO

POINT OF VIEW

The Diversity and Inclusion discourse needs to be accompanied by actions. It is a starting point, with the recognition of those “different” to us. And it cannot coexist with contradictory actions by companies. Consumers can easily identify these contradictions, as social media allows them to be exposed and shared to a wide audience.

For fear of public scrutiny or lack of knowledge of Diversity and Inclusion practices, some brands and companies prefer not to choose a position or stay on the fence. This will be increasingly difficult to maintain for three reasons:

1. In not wanting to get involved in topics that they consider “sensitive”, brands are increasingly coming under fire.
2. The ever-stronger expression of identities and communities means brands run the risk of disconnecting from their audiences and their consumers.
3. Several studies prove that Diversity & Inclusion equates to superior business performance.

This means that companies that do not embrace this cause are likely to be left behind.



COMMUNICATION & ADVERTISING: HOW CAN BRANDS SPEAK AUTHENTICALLY ABOUT DIVERSITY?



Marcio Aguiar,
Ipsos UU

The turning point regarding diversity came in 2020 after the tragic assassination of George Floyd in the US which sparked protests around the world.

Because the difference only exists through a perspective, that is, in order to a person to be person is white, he needs to be white versus another color, if the white person does not consider himself part of the equation, it is established that there is ME and OTHERS.

Before thinking about how diversity is used in inclusion campaigns, it is important to realise that diversity has been, and is still, used for specific interests. What has changed is that this interest now has a more positive focus. Migration policies, birth control, racial apartheid, religious segregation and persecution of sexual minorities have always been ways of executing power centered on diversity – or difference. Therefore, it is wrong to say that talking about diversity is something new. On the contrary, the world has always been obsessed with talking about differences and using them according to their needs. Knowing that this is the way the world operates today, we recognise that exclusion exists and therefore need to work hard on the opposite process.

What changes for 2022 is that, after many years of construction, a dialogue has been established in which people different from what the market was used to now sit at the decision-making table. This does not only refer to the increased participation of women, black people and LGBTI+ individuals in decision-making positions in large corporations, but the influence exerted by

the public and consumers that often makes executives and executives around the world compelled to return to their tables and rethink strategies, as well as a contingency plan to remedy errors. People are increasingly aware of the attitudes of companies they spend their money on.

As we observed in 2020, and at other times in history, the street played an important role in building an alliance for equalising race relations in the US. It is to be expected that, with the return to the public space, the street will once again be the stage for social demands, leading to conversations that start in theory, then move into the physical world, where consumption also takes place.

EMPATHY AND WORKING FROM THE INSIDE OUT

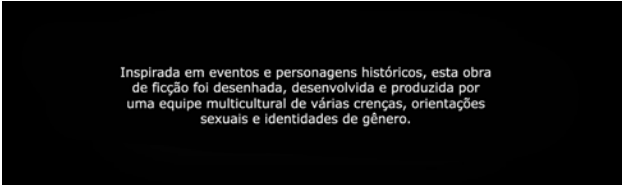
For marketers, the main task is to listen and respond to the needs, desires and wishes of the public. It is therefore important to put yourself in people's shoes.

Inclusion starts with a truly diverse and inclusive environment and marketing design team. Successful innovations must reflect the true philosophies and ethos of an organisation while seeking to connect with the needs of those who consume it. When we see brand marketing and product design going wrong, the cause may be related to the lack of a truly diverse team that can bring different points of view.

When designing for a specific community or audience, it is essential to have designers and consultants who are members of these communities and who can bring first-person experience to the process. Using someone as a consultant, as an afterthought, is no longer enough. They have to be part of the process.

UBISOFT: BEWARE OF PROMISES

One of the first loading screens of games from the franchise "Assassin's Creed", from producer Ubisoft, shows the following message:



Inspirada em eventos e personagens históricos, esta obra de ficção foi desenhada, desenvolvida e produzida por uma equipe multicultural de várias crenças, orientações sexuais e identidades de gênero.

This type of statement generates an expectation that the gaming experience offered and the entire narrative are firmly aligned with entertainment that respects plurality.

The problem is when reality does not live up to what was indicated. After the game's release and a widely publicised public dispute over allegations of sexual harassment within the company, Bloomberg journalist Jason Schreier informed the public that the main character, Cassandra, is shared with her brother, Alexios, following a direct demand from the marketing executive who led the team at the time, Serge Hascoët.

Some team members even stated that the main justification given by the marketing team for this is that “women don’t sell”, leaving a large part of the population out of the dialogue.

“THE DEVELOPERS OF ‘ASSASSIN’S CREED ODYSSEY’ WANTED KASSANDRA TO BE THE ONLY PLAYABLE PROTAGONIST, BUT UBISOFT’S MARKETING TEAM AND CREATIVE LEADER SERGE HASCOËT DIDN’T ALLOW IT: WOMEN DON’T SELL, THEY SAID.”

Despite this, it is possible to see throughout most of the game that there was an effort to make the experience of the player as broad as possible in terms of sexuality. Regardless of the chosen character (Kassandra or Alexios) it is possible to relate to people of any gender. Then came the DLC (Downloadable Content) with an expansion to continue the game after the end of the main story).



Erwin Vogelaar @ErwinVogelaar · Jan 15, 2019



Odyssey is the first Assassin's Creed in which you can play the entire story as female character. And you get the freedom to play her as lesbian. Now in the newest DLC, Ubisoft is forcing the player into a straight romance and having a baby... Spoilers: [reddit.com/r/assassinscre...](https://www.reddit.com/r/assassinscreed/comments/1000000/odyssey_is_the_first_assassins_creed_in_which_you_can_play_the_entire_story_as_female_character_and_you_get_the_freedom_to_play_her_as_lesbian_now_in_the_newest_dlc_ubisoft_is_forcing_the_player_into_a_straight_romance_and_having_a_baby_spoilers/)



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@SpongeMariin

I thought I bought assassins creed adyyssey not the handmaid's tale

4:16 PM · Jan 15, 2019



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After the first episode of misogyny that generated several questions about the promise of a story really thought by different people, the continuation of the game required that for players to complete the main mission, they had to have a relationship with someone of the opposite gender and have a son,

regardless of whether, during all their playing hours, they had chosen same-sex relationships. After the accusations, the main executives involved in the two cases resigned from their positions and left the company.

RUPAUL'S DRAG RACE: DIVERSITY IN DIVERSITY



14 years ago, a TV show called RuPaul's Drag Race was born, a competition between drag queens to find the next US Drag Superstar. The show has won over audiences around the world as well as several television awards, establishing itself as one of the most successful reality shows.

For those who are not familiar with it, the beginning of each episode sees RuPaul enter the room and brief the competitors on the week's challenges, then kicking off the events announcing "Gentlemen, start your engines, and may the best woman win"

People may gather from the premise of the show that it is a display of inclusion and diversity; led by a gay black man that has been openly celebrating the LGBTI+ community for more than a decade. However, the work is never complete when dealing with cultural movements.

Now it's twelfth edition, some important adaptations are still being made, including the language used; changing "Gentlemen" to "Racers", for a more inclusive call to action.

This type of movement brought to attention talents such as Gottmik (Kade Gottlieb), one of the participants in the 2021 series. Kade is a transgender man who has encountered prejudices from the community in general and obstacles in his career as a drag queen. He explains that some people think that a trans man would have advantages in impersonating a woman in a drag queen competition. Gottmik not only succeeded in having one of the most engaging narratives of the season but was also one of the show's four finalists (sorry for the spoiler).

What can a brand learn from RuPaul's Drag Race?

That there is no "map" for diversity and inclusion because the path is formed along the journey. When a brand sets out to work with diversity in an authentic way, it must be willing to leave behind old arguments, be open to the possibility of having to apologise, and recognise that everything can change quickly.

TOKENISM

A brand on the living process of diversity may take shortcuts along the way. One of them is "fake fairness": the act of "tokenising" people to appear more diverse. For example, if when reviewing an advertising piece, you notice that everyone in an advertisement is white, you notice a problem in the process the realization has come too late. But what usually happens is that then a race to include at least one black person there in the frame.

It's not about appearing diverse and rushing in at the last minute to make adjustments that sell a shallow image of inclusivity. Instead, it is about bringing and representing more diverse perspectives; from our teams, our audience, and our communities – at the beginning and at every stage of the process.

If done as a symbolic, superficial gesture, it can do more harm than good.

To authentically demonstrate diversity and inclusion, start by being less focused on the messages, visuals and context used in your brand communication. Sharpening your focus to understand which aspects of diversity are most important to your audience and then actively represent, recruit and invite those views. Putting a line in the briefing for an agency to “include diversity in the campaign” is not the best solution, as the public is aware not only of the campaign and what the brand communicates, but also what is behind the brand.

FATIGUE

Another issue is fatigue. Looking at a never-ending process full of pitfalls and with new actors emerging all the time seems tiring. It may have seemed that diversity was the promise of a process with a beginning, a middle, and an end. But, it is not that simple. Some very important arguments remind us why we shouldn't lose sight of diversity:

- Inclusion is necessary for brands to sustain themselves in the long term. It is only through the tension between the old and the new that new solutions and ideas emerge.
- The job market is re-organising so that more people are part of the conversation. This will continue as social movements demanding access to education and corporate inclusion programs bring more professionals from different backgrounds into the workforce.
- If you don't do it, someone else will. In a competitive market someone, either directly or indirectly, will prioritise diversity in their narrative and their brand may be left behind. It's worth noting that small brands that are often born with diversity in their DNA.

SCENARIO

- Position yourself or be positioned. Dialogue between brands and consumers is a demand from the public itself and this interlocutor will serve as judge and jury to decide whether the brand respects diversity or not, or is aligned with its own premise.

POINT OF VIEW

When brands keep diversity and inclusion at the heart of their product development, their message should be less about the brand and the product and more about how the product empowers people or changes their lives for the better. Ubisoft did not do this. In addition to frustrating its audience by delivering a completely different experience from the rest of the game, it also broke a promise that is reiterated every time players start a company game, wasting the opportunity to represent people who are normally marginalised.

A product or service that really values inclusion must be able to start a conversation with one person while not excluding various communities. Kat Holmes, Google's UX director, in her book "Mismatch: How Inclusion Shapes Design", mentions that "designing for inclusion starts with recognising exclusion".

This has to be the beginning. Recognising the factors that create exclusion and divisions between different communities is the first step towards creating a truly inclusive product or brand identity.



CANCEL CULTURE: A VIRTUAL COURT SUMMONS FROM THE PUBLIC



Alex Candido,
MarComs

In January 2021, Rede Globo, the major Brazilian broadcaster launched the 21st edition of the major reality-show Big Brother in Brazil. The TV show, reaches record viewing figures, is always one of the most talked-about subjects on social media, including by celebrities. This year, the phenomenon was exacerbated by the pandemic and social isolation, which focused the spotlight even more on what was happening in the show. Another reason this season generated even more public engagement was the issue of being “cancelled”, a very common practice in the era of virtual relationships. But what exactly is this cancel culture, and why are brands and people, especially digital influencers, so impacted by it?

THE ORIGIN OF CANCELLATION AND THE LIMITS OF FREEDOM OF EXPRESSION

Social networks have given unprecedented reach to the dissemination of messages and thoughts. As a result, comments that were previously restricted to small circles of friends and family are literally shared with the world.

In this context, the (not so fine) line between opinion and hate speech has been called into question. Many people, under a false sense of protection from

an anonymity that social networks seem to provide, began to feel comfortable exposing their personal thoughts and opinions.

Backed up by an argument for freedom of expression and a fight against the “politically correct”, hate speech gained ground – including during elections. While the term “politically correct”, is often used in a pejorative tone as something that hinders freedom of expression, the anti-political correctness stance is generally encompasses attitudes of disrespect for ethnic, racial and sexual diversity, among other issues whose “correctness! should not even be up for discussion. In short, a mere excuse that some groups in society use to be able to perpetuate prejudiced and chauvinist speech.

Faced with a flood of a lack of common sense and gratuitous hatred, a counter-movement led by groups considered to be minorities – and soon embraced by expressive segments of society – emerges as a response to this type of discourse, especially when coming from influential people: cancellation.

In practice, cancellation can be summarised as vehement criticism of a person accompanied by their banishment, with the purpose of punishing them for a serious error. This seeks to remove their presence online, in people’s social media feeds, or in the real world. In general, the cancelled person is accused of racism, xenophobia, homophobia, or prejudices towards others based on social class, gender, and physical characteristics, or other demonstrations of intolerance and lack of respect.

In this way, cancel culture emerges as a normative conception of democratic citizenship according to which people are only free if they are able to contest political and social arrangements that disrespect basic concepts of coexistence in society.

LOSS OF FOLLOWERS, LOSS OF SPONSORS

The consequences of cancellation go beyond a mere act of repudiation. They place a burden on public image and reputation, could incur financial losses to the person who has been cancelled. It may even lead to lawsuits.

The probability of cancellation increases with the notoriety and reach of the cancelled message. This means, as public figures, celebrities and influencers are more likely to be cancelled –that their attitudes and speeches influence thousands, perhaps millions of people.

A well-known case is that of digital influencer and fitness guru Gabriela Pugliesi, who lost thousands of followers in just a few hours after throwing a party at her house during quarantine in April 2020. This controversy was made worse alongside her having posted comments lamenting the impacts of the pandemic. In addition to her followers, the influencer lost advertising contracts with brands such as Grupo Hope, Mais Pura, Desinchá, Liv Up, and Fazenda do Futuro. Copenhagen declared that it did not agree with Pugliesi's position and informed that the contract with her was retracted without intention of renewal.

The Pugliesi case is a good example of the effectiveness of cancellation to combat the lack of common sense of influential people, assuming their influence could put others at risk.

THE ONLINE COURT: TIMES OF INTOLERANCE, INTRANSIGENCE AND IMPATIENCE

What started as a defensive tool to repudiate gratuitous hatred and lack of awareness quickly became a weapon of attack and distillation of this same hatred.

Returning to the case of Big Brother in Brazil, and the cancellation of the singer and influencer, Karol Conká, we can see that the show has always created characters. Good guys and bad guys facilitate the creation of a bond

with the audience. This is part of a strategy to identify with the audience as people need someone to support and to cheer against. So, what was different about this time?

Three factors were at play: the isolation as a result of the pandemic, the explosion of the digital, and hardened opinions caused by the polarization of society.

With the audience stuck at home, the show registered ratings not seen in over a decade. But now, unlike in the show's heyday, people were no longer only attached to the TV screens; they were also connected to their smartphone screens.

And it is clear that social media gives people enormous power. With a keyboard in hand, many consider themselves judges and experts in the most diverse subjects. Cancel culture then took on a new role: it became a contemporary, virtual, and more dynamic dress for an old practice known to all: lynching.

There is a psychological factor involved. People tend to generalise characteristics of something or someone, whether positive or negative - even more so in polarized scenarios. They may fall into a pattern of thought that some theorists call tunnel vision, that is choosing to see only some facts and systematically ignoring others. And the internet and social networks are fertile ground for these types of behaviours. The digital environment shows the world through the lens of perfection, glamorized with Instagram filters. This illusory vision of perfection makes every single mistake reverberate even more intensely, generating Homeric lynching disguised as cancelling.

A DOUBLE-EDGED SWORD

It is worth noting that, in addition to direct impacts, such as loss of followers and financial losses by individuals, important indirect impacts are also caused by the culture of cancellation. Behaviour experts claim that such negative impacts hit both the cancelled and the canceller.

Psychiatrist Galiano Brazuna, in an interview with Portal G1, mentions that,

when cancelled, the subject generates a feeling of isolation that can strongly impact their mental health and cause violent damage due to contempt, abandonment and disregard, in addition to attacks against their morale and nature. Cancellers, on the other hand, end up becoming people who are too critical, intolerant and intransigent and, in a way, not able to coexist with others in society.

THE BONFIRE FOR CELEBRITIES

The Big Brother Brazil case made clear that today's practice on cancelling takes on a more volatile character, and with greater speed and range.



Just as people gathered in the Middle Ages to burn witches in a public square, today we sit in front of the TV armed with our keyboards and smartphones to watch Karol Conká's inquisition. It is worth mentioning that, regardless of disagreeing with the participant's attitudes, what is at issue is the spectacle of Conká's cancellation and the harmful counter-hate that people felt entitled to unleash against the singer - including threats attacks on her physical safety, and racist and misogynistic comments. This was possible to see in the documentary about the singer released a few months after her departure from

the reality show. These attitudes are part of this character of inquisition and go beyond the contestation of errors that the cancellation initially proposed.

The Conká case also made evident the immediate reach of her cancellation, which overtook posts on Facebook, stories on Instagram and trending topics on Twitter. To get an idea of the extent of the damage caused, the study *The Most Influential Celebrities in Brazil 2021*, placed Karol Conká in last place among the 200 celebrities evaluated in the survey.¹⁶

And it also tells us a lot about what brands and companies themselves are subject to today.

THE GUILLOTINE FOR BRANDS

Impacts on reputation and image can be very difficult to mitigate and impossible to reverse. For brands, the scale that cancellation can reach poses a great danger.

Recent cases of large supermarket chains accused of racism show that damage to an institution's image can have serious possible financial losses. An incident that resulted in the beating and murder of a 40-year-old black man, saw a drop in the accused company's share value of more than 2 billion, according to data published in an article by CNN Brazil. in the value of its shares on the Ibovespa.

Reputation is a brand's most valuable asset, and if the attitudes that generate a cancellation are fully justifiable, they can bring indelible consequences to the brand's image. For Fábio Alperovitch, creator of the Fama investment fund, a specialist in ESG, the repeated controversial cases involving the retail group in question bring the risk of the chain becoming a new Vale, in terms of its compromised image. However, the group took internal measures, mainly in relation to the hired security company, and announced the creation of a R\$ 25 million fund to promote inclusion and fight racism in a movement similar to

that made by Nubank.

The fintech case also had great repercussions and a strong pro-cancellation movement. One of the bank's founders, Cristina Junqueira, in an interview with the Roda Viva program, became embroiled in controversy when she said that the company does not have black people in leadership positions "because the selection cannot level out". It created an investment fund to fight racism and launched a broad selective process of hiring black people in a quick reaction to try and remedy the situation caused by Junqueira's comment.

Similar to the Pugliesi case, another emblematic incident involving the pandemic was the case of the Osklen brand. The brand launched, right at the beginning of the pandemic, a line of masks at exorbitant prices, far above expected for this type of product. The brand faced strong retaliation on social media and was forced to withdraw the product from circulation. The damage to reputation was significant and generated a very negative picture of opportunism.

The aforementioned context of polarization still causes brands and companies to be cancelled not only for mistakes and failures, but for any attitude that displeases a certain portion of the population. Companies that took positions in support of diversity in the last year, such as Magalu, O Boticário, Burger King and Ambev, suffered cancellation attempts by more conservative groups in society.

The brands, then, find themselves at a crossroads between taking positions and suffering from retaliation from audiences that feel affected in some way.

UNAFRAID TO TAKE A STAND (WITH COMMON SENSE AND RESPECT)

So, is the fear of cancellation a plausible justification for avoiding controversial

issues and not taking a stand? The answer is no. Quite the opposite. Today, with brands constantly under the scrutiny of consumers who increasingly want to see themselves represented by what they buy, it is quite possible that a company or brand will be cancelled precisely for keeping silent.

The Ipsos Reputation Council study already showed in 2020 that 77% of respondents expect companies to contribute much more to society than

they did in the past while 78% believe that companies should indeed support social causes.

In the current scenario, it is practically impossible to please everyone. Hatred towards brands and public figures that do not align with the expectations of a particular person or group is, unfortunately, to be expected and a natural consequence in the scenario already described, in which polarisation and digitisation dictate the new way for people to relate in the virtual environment (and outside of it).

However, the trend of a search for purpose observed in recent years, and recently identified by the Ipsos Global Trends Survey study as one of the most accentuated during the pandemic period, shows that brands and companies cannot and should not be afraid of take positions – as long as they are aligned with their values and in an authentic way.

POINT OF VIEW

The Ipsos Essentials survey, in a wave carried out in January 2021, shows that 69% of respondents agree that they “want to hear more about what brands and companies have to offer” and 50% “are tired of seeing brands that only offer solidarity and support and do not put into practice their speech”. It is necessary to go beyond the act of taking a stand; it is necessary to eliminate the gap between “saying” and “doing” and putting speeches into action.

**69%**Strongly agree/
somewhat agree (T2B)

**“I want to hear
more about what
brands and companies
have to offer.”**

**67%**Strongly agree/
somewhat agree (T2B)

**“I want to know more
about how brands/products
can help me in my
current situation.”**

**50%**Strongly agree/
somewhat agree (T2B)

**“I'm tired of
seeing brands that
only offer solidarity
and support.”**

Base: 750 adults between the ages of 18 and 65/ Q: Please, indicate your level of agreement with each statement

Between the cancelled and the cancellers, statements that remain clear and firm, based on empathy and purpose, and aligned with common sense and respect, will be able to continue sailing out without sinking into those turbulent and intransigent waves of the social media.



MEDIA: NOT EVERYTHING THAT IS NOT FAKE NEWS IS REAL NEWS



Luciana Obniski
Ipsos UU

HOW POST-TRUTH DRIVES BINARISM – AND THE RISKS IT ENTAILS

It's undeniable. The manipulation of facts and news, which has been around for a long time, has gained strength (and even won elections) in recent years.

Fake News would normally emerge during the pre-election months, when manipulating narratives would hope to influence the political outcome. Now, during the pandemic, narratives purposely distorted from reality have been a decisive factor at various times - for health protocols, possible treatments and the possible adverse effects of vaccines. This kind of messaging continues to affect the pace of vaccination worldwide.

More impressive than the strength that this has on our older relatives is the response of the mainstream media, who watch in amazement at the strength that unproven stories compared to journalism that is supposed to be serious and committed to the truth.

But is it that the mainstream media is still oblivious to invented narratives and reports facts in an objective way? Or is it no longer able to detect bias that is gradually infiltrating conventional media?

Large news websites already dedicate space to denying certain narratives and increasingly respond to those who profit from them.

However, biting into the irresistible bait of proving that fantasy narratives lack any scientific proof produces a shallow, binary dynamic that ends up giving even more room to conspiracy theories. More importantly, it gives the mainstream media a false sense that, simply by fighting the most absurd of them, they are not feeding false narratives.

So, are readers able to bypass Fake News by sticking to the major media outlets? This question has been around journalists and researchers for some time (a survey by Ipsos even indicated that some Brazilians already trust brands more than the government) and, of course, the pandemic helped to make this question even more urgent.

However, it may also have finally helped us to better understand where the Fake News monster is headed, a question that has plagued us for decades but has only recently started to be seen as a real threat to the important institutions of our societies.

FAKE NEWS, NARRATIVE AND MANIPULATION

Ipsos delved into the topic of fake news and trust in 2018 with study that indicated the public's perception of false news around the world, including Brazil. Respondents made clear their perception that Fake News is not only stories that contain false data, but stories that manipulate part of the data in favour of a particular narrative.

It is the last part that this article is interested in.

In recent years, the polarisation of subjects dealt with in the media (in particular politics, economics and now health) has created a public acceptance that there are only two sides to complex issues: the truth and the lie. I know that I run the risk of advocating for those who relativise flat-earthers, as if this were a mere "opinion" (it's not, the Earth is round, no doubt here, let me be clear), but we know that the binarism sometimes imposed by emotions that arise when we

discuss certain issues, is rarely true. And more: it robs us of the exercise of evaluating the variables and biases around these data, as well as, it must be admitted, questioning the method of capturing and evaluating this information, so that they continue to be current and representative.

WHY IS ALL COVID NEWS BAD NEWS?

Research by Bruce Priest, Ranjan Sehgal & Molly Cook, tried to classify all stories on the subject of Covid-19 as neutral or negative.

This method follows the same principle as some processes in the Social Intelligence Analytics area here at Ipsos, which analyses open data on social networks and even manages to classify and quantify emotions, something that has added a lot to the analysis of behaviour changes and trends.

The effort made by researchers to classify the stimuli in this way is even more valuable during the pandemic. This is because it is such an important and polarising topic, and also because it is marked by data and scientific studies, making it easier to be compare how it is treated in the media.

The research has shown that, in the United States, when the Coronavirus became a global threat in January 2020, reports on the subject followed scientific discoveries – and the news was almost all negative. After a few months, when some studies were already pointing to possible solutions (promising vaccine trials and drops in transmission – therefore positive news), media articles did not follow the scientific “optimism” and focused in on data that still described a chaotic situation, maintaining a negative tone.

The study looked at the American media, but we can confidently say that if the study were carried out in Brazil, the result would be similar.

HOW TO REPORT ON A PANDEMIC?

The approval of Pfizer's vaccine in the US was defined as the milestone that would end the more pessimistic coverage of the pandemic. In Brazil, however, the more impartial media, inflamed by a political polarisation like the country has never seen before, allowed interpretations of data on Covid-19 to take on political weight and diluted moments that could be seen as milestones or inflection points at the peak of negative news of the pandemic.

As in the US, the Brazilian media at times ignored evidence that efforts of local governments to reduce the spread of the virus were working, so as not to weaken the narrative that the country was adrift.

In aiming to be a counterpoint to Covid deniers and attempting to convince even the most skeptical of the real threat of Covid-19 in Brazil, the Brazilian press ended up moving away from the interpretation of data. Efforts were concentrated on convincing parts of the Brazilian population of the seriousness of the situation in the absence of official government bodies that were supposed to help spread this knowledge, but instead insisted on denying that the pandemic was underway.

But we must remember that the role of the media in contemporary society is to objectively inform the public by analyzing and reporting data and facts, so that they can build their own narratives, no matter how complex.

When this goal recedes, or encounters emotional disputes along the way, there is a risk that people will begin to question the intentions of the Brazilian media and the credibility of the system. This is especially true in a country that has been facing crises as big and important as the pandemic in its political and economic spheres for more than 15 years. In other words, while Fake News may put the ability of the average Brazilian to be informed at risk, this threat also comes from a media that ceases to perform its primary duty of objective reporting.

The bias towards pessimism in the United States did not have major repercussions on society of course the election of a new president in early 2021 is an important factor. This provided great reassurance to Americans dissatisfied with President Trump's handling of the pandemic. In Brazil however, this bias was taken by several groups as evidence that the articles produced by the media no longer corresponded to scientific data.

One of these groups were schoolteachers across the country, who pressured governments and institutions not to reopen schools when the transmission rates in the country were showing an improvement. This ended up delaying the reopening of some schools by almost three months in one of the countries that left its teaching centers closed for the longest time during the pandemic, according to a UNESCO report.

BEHAVIORAL SCIENCE, THE METHOD TO GO DEEPER

If we analyse the issue of news (mis)information through the prism of Behavioral Science, a methodology frequently used at Ipsos, a deeper analysis of stimulus and response shows that the mainstream media becomes distanced from its goal by allowing itself to be guided by Fake News. Another cause-and-effect relationship of the more pessimistic narrative is seen in people who have lost the ability to assess the real risk of the pandemic, acting much more cautiously than the protocols suggested by the authorities – their reality becoming distorted in the same way as antivaxxers.

It is in complex moments like these that behavioral analysis is so important, not only so that it is possible to think of solutions that bridge divided opinions and allow for a broader set of possibilities conclusions for individuals and society. The important task is to build a complexity of thought that accounts for the current reality without reducing narratives or the people.

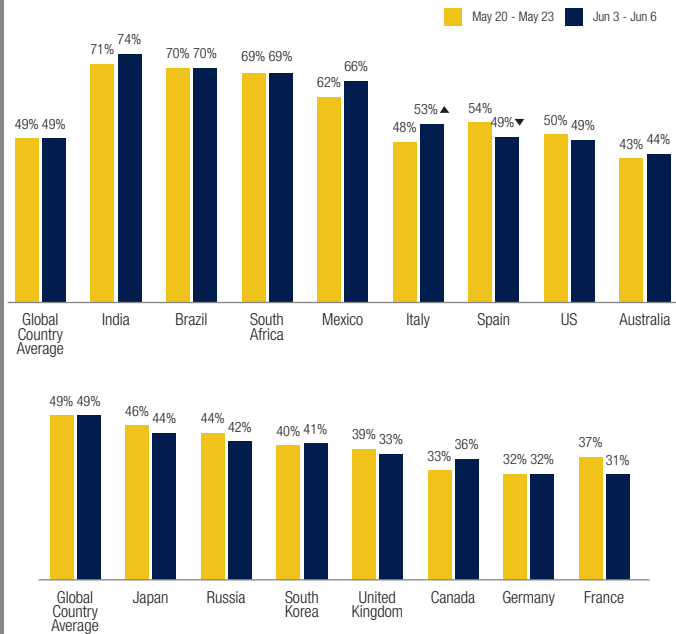
SCENARIO

POINT OF VIEW

On one hand, this scenario may seem bleak, as it proposes that actors of society are not playing their required role. But it also opens a valuable space for those who find ways to propose a more complex conversation. The Ipsos Essentials survey finds that 70% of Brazilians believe companies and brands are more reliable sources of information than governments, offering a great opportunity for brands to connect with their audience in a much more valuable and inspiring way.

Brands vs. Government Trust by Country

"I trust brands and companies to be a more accurate source of information than my government"
(% Strongly + Somewhat Agree)





QUARANTINE COEXISTENCE: CHILDREN, FAMILY AND SOCIAL EFFECTS



Eliana Mello,
Brand Health Tracking



Suzana Villaverde,
Ipsos UU

ZOOMING IN ON INEQUALITIES

Suddenly, our houses became our entire world – and as individuals, families, or society, we were not prepared.

The domestic sphere is traditionally considered a kind of refuge, the “mountains” to which we fled after an exhausting day of work, a place of connection between people who love each other, where we take off our shoes and exist in comfort and safety. But when the other side, the social life in the public environment is lost, we realise that this idyllic fantasy doesn’t work quite like that, at least not for everyone and, especially, not 24/7.

The forced existence in quarantine exposed both the human difficulties of continuous intimate contact with each other. It also revealed how our lives were designed for keeping issues in this personal world invisible. Now, zooming in on it, we see the countless issues that for years and years had been swept under the rug.

Starting with Brazil’s inequality, which means families have completely different experiences even with a virus that doesn’t discriminate. With the

possibility of maids and nannies harbouring the virus in their homes, some came to agreements in which domestic workers would spend the night at work or use private transport to avoid exposure in public spaces. This strata of elite citizens, who delegated the care of children and the home, were able to take advantage of the time to spend more quality time with their own.

On the other hand, mothers without the same financial privileges who already juggled multiple routines in their professional life, family, and home, found themselves completely helpless. According to data from the IBGE (Brazilian Institute of Geography and Statistics), they were the most impacted by unemployment, especially single mothers who represent more than 11.5 million people in the country.

The importance of the role of women in domestic and care responsibilities has overflowed – and inequality in marital relationships was also evident. If, on one hand this revealed and enabled men to experience the intensity of domestic care - 47% became more familiar with it during the pandemic¹², on the other hand, this change in the household dynamics also caused an increase in conflicts and separations, leading notary offices in the second half of 2020 with a 15% increase in the number of divorces compared to the same period the previous year (according to data from the Colégio Notarial do Brasil).¹³

Also noticeable was the rampant increase in violence against women, which in the first month of the pandemic registered a 40% increase in complaints, with the aggravating factor that half of these women claim that this violence takes place within their own homes.

EMPATHY AND ACTION

Some brands quickly reacted to this harsh reality, with Magalu, Avon, Natura, and Marisa, among others, offering channels to report instances of abuse., This reinforced that, in such a sensitive pandemic context, the brand-

consumer relationship must go beyond products to generate a more emotional approach.



With families often marked by non-acceptance of homosexuality, social and professional life has always been an important source of independence and freedom for the LGBTQ+ community. However, they were some of the most affected by the downturn in the labour market, according to the National LGBTQI+ Alliance. It is estimated that unemployment has reached 40% of the community, reaching 70% among trans people, well above the general population that has 14% unemployment (Pnad)¹⁴. This forced people to return to the home of relatives, often making them vulnerable to aggression in exchange for having a place to stay.

Some brands that have been positioning themselves in support of this community, especially through communications, but they still face the challenge of transforming this discourse into practice. Job offers is one example, as financial independence is often keys to freedom and protection.



EDUCATION AND AWARENESS

This importance of looking at what really happens in the home is essential to avoid undesired consequences. One of the clearest examples is managing home education with the lack of structure from school.

While they were not treated as an essential service during the pandemic, it is clear that schools, much more than transmitting educational information, serve as a safe environment for parents and children, are points of physical and food safety for many children, and encourage social interaction, which was severely impaired during this period.

Studies show that, while children up to 10 years old tend to present significant learning gaps during remote education, adolescents also show emotional



damage, with the growth in cases of depression, anxiety and even insomnia among them.

A survey by Fiocruz, carried out in December 2020, shows that around 50% of adolescents report feeling worried, nervous, and moody frequently¹⁵.

POINT OF VIEW

It is important that the resumption of social life after the intense experience of spending so many days and nights with our domestic difficulties does not ignore everything that has revealed itself: the exhaustion of women, the helplessness of mothers, the vulnerability of minorities, and undervaluing schools as an essential social pillar.

Employment must be reorganised to ensure that the home is no longer a dumping ground for hidden issues and becomes the space that people need it to be.



POST-VACCINE LIFE: WILL HEALTH PROTOCOLS FOLLOW? THE FEAR OF GETTING TOGETHER



Isabela Zanini,
Office Management

BRAZIL, THE COUNTRY OF THE VACCINE?

Brazil has always been considered a world reference in vaccination programs. Its mass vaccination campaigns go back to the beginning of the 20th century, established by the troubled movement known as the Vaccine Revolt in 1904. At that time, the country was facing an outbreak of smallpox, and its population was forced by the government to get vaccinated.

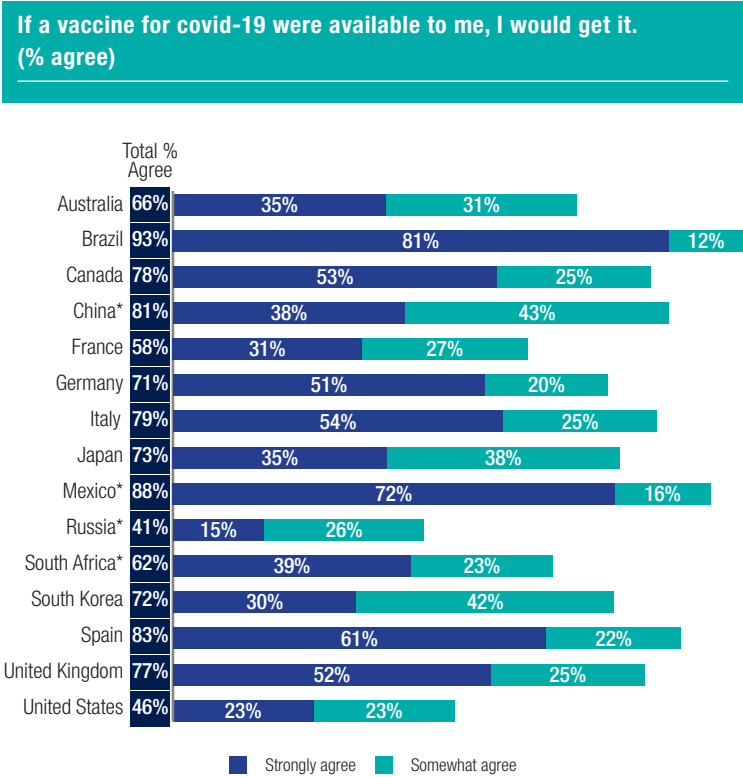
After numerous protests, the president Rodrigues Alves had to undo the mandatory vaccination. Since then, the practice of vaccination in Brazil has been improved and incorporated over the years, with many successful campaigns and disease eradication. In 1973, the National Immunization Program (PNI) was created.

The contrast of the Covid-19 vaccination campaign, marked by political differences, and which is moving at a slow pace, indicates that we will still need to wait for the population to be widely vaccinated and for the country to stabilise and return to normal life. The forecast of the vaccination campaign released by the Ministry of Health has already been changed numerous times, and it is most likely that it will be completed in the first quarter of 2022.

To effectively eliminate the circulation of a virus such as Coronavirus and to protect the population, at least 70% of the population must fully vaccinated.

SCENARIO

Thousands of people in Brazil are eagerly awaiting the opportunity to take the long-awaited vaccine against the virus that causes Covid-19. According to an Ipsos study, 93% of Brazilians said they would take the Covid-19 vaccine as soon as it becomes available¹⁶.



RESUMPTION AFTER THE COVID-19 VACCINE

We are still far from the end of the pandemic in Brazil.

We continue to face uncertainty about the future with the emergence of new variants and the shifting pace of the country's vaccination programme causing

instabilities and prolonging the high rates of cases and deaths. In turn, this also delays trade and business recovery in the country.

As of June 2021, Brazilian states have shown interest in trying to speed up the vaccination process so that normal life can be resumed in 2021.

In São Paulo, which expects to complete the vaccination of its population in the first quarter of 2022, the state government is already enabling events to run with strict safety protocols, with support from the private sector, aiming to start the economic return.

These model events should take place across the state, in controlled environments with testing of participants before and after the event and with government monitoring.

In the private sector, a survey conducted by KPMG with entrepreneurs across Brazil from various sectors in April 2021 asked about the return to offices and found that one-third of companies plan to resume activities in 2022, after vaccination.

Even with vaccination, half responded that they will maintain the rules to combat the spread of the virus, such as wearing protective masks and using hand sanitiser, reducing office staff, and practicing social distancing. Only 3% said that they do not intend to keep up these rules.

The research also indicated a concern about the emergence of new strains of Coronavirus, which to date have demonstrated greater resistance to currently available vaccines as they were developed based on the first strain of the virus. Three-quarters thought that the new strains could affect the office reopening schedule.

Considering the outlook of the national vaccination program, the forecast for the great recovery in Brazil is that it will start in early 2022. At that time, widespread vaccination of the population will help the return of a more stable and reliable normality.

NEW POST-PANDEMIC HABITS

The habits and protocols acquired during the pandemic became part of the daily routine of millions of people. Practices such as constant hand hygiene became part of daily personal care and, very likely, will be maintained by a large part of the world's population.

Some habits acquired for the first time during the pandemic were already practiced in some countries. In Japan, for example, a considerable part of the population has already used masks as a daily habit for years. It began at the beginning of the 20th century after the Spanish flu pandemic, in which approximately half of the population was infected virus and 390,000 people died.

At the time, masks were used to control the virus in the country, before vaccines. Since then, the habit of wearing masks has become part of the culture and has been incorporated into Japanese life.

Not only hygiene habits, but consumption habits acquired by many during the pandemic could remain in the post-vaccine world. Digital purchases and medical teleconsultations are some of the new practices that have proven effective during a challenging time of isolation and distancing imposed by the Coronavirus.

According to a global study carried out in 2021 by Ipsos on consumption habits during the pandemic, 47% of Brazilians made more purchases online compared to before the pandemic, and even with the reopening of commerce, many companies are investing in technology and online commerce to enable them to reach new customers, already used to virtual consumption.

We are also more fearful and more after the pandemic and it is not possible to predict how long the vaccine's protection will last.

With this uncertainty, normality will likely occur gradually and only after the total stability of the virus across the world can we say that we have reached the end.

POINT OF VIEW

Due to the duration of isolation and physical distancing, we anxiously await human contact and, most likely, we will have an explosion of socialisation in early post-vaccine life in Brazil, when we may feel safer to carry out the activities we avoided, and missed, during the pandemic. However, when we reach a scenario of normality, the changes caused by the pandemic will already have had a profound impact and normal will look different.

Even in a post-vaccine scenario, the shocks caused by the pandemic demonstrate significant changes in people's lives and ways of living and working. New habits have been incorporated into daily life and personal relationships are constantly changing.



TREINAMENTO

Vereador

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ONEBOLD



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POLITICS: IN ELECTION YEAR, WILL WE REACH AN INFLECTION POINT?

If after the Brazilian presidential elections in 2018 we were asked how things would be in 2021, nobody could have imagined the radical change that the world has experienced, which have in turn made it impossible to talk about society and politics without considering the impacts of Covid-19.

With no pretensions of predicting the future, the challenge of selecting the key elements of the upcoming election year starts with understanding the transformations in the socio-political scenario in recent years, and then turning to the current situation and the possible inflection points leading into the 2022 elections.



Rafael Pisetta,
Public Affairs

POLARISATION: A STRIKING FEATURE IN BRAZILIAN DEMOCRACY

Today, 74% of Brazilians think the country is heading in the wrong direction¹⁷, and not without reason: the scenario is one of economic austerity, with almost 15 million unemployed (14.7% of the population, higher among women: 16.7%; and black and brown people: 17.2%)¹⁸, and in a pandemic situation where Brazil ranks second in the world for total deaths.

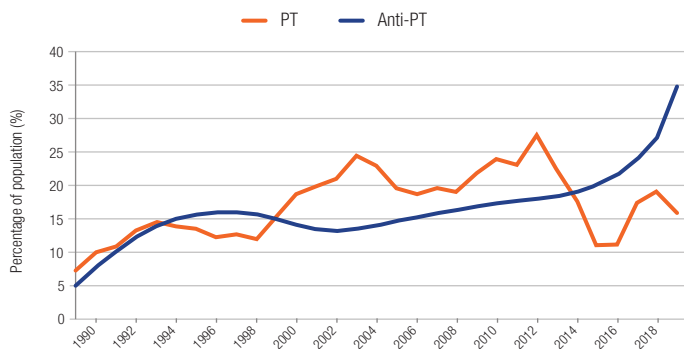
The inefficient public management in the fight against Covid-19, coupled with a posture of denialism, sterile debates, fake news and a slow vaccination rate, is unsettling for Brazilians.

CONSEQUENCES

For nearly three decades, presidential elections were a contest between PT and PSDB. As they occupy the center-left and center-right of the Brazilian ideological spectrum, electoral polarisation followed the same logic of this two-party system.

The constitutive difference, according to political scientists, is that in its development, the center-left achieved a positive party identification, termed “petismo”, while the PSDB was reduced to a negative identification or antithesis of the former, which we know as “antipetismo”. Both evolved gradually, as shown in the graph below¹⁹.

Proportion of the population that, over the years, identifies as PT or anti-PT



Data computed by the author from opinion polls from several available companies

During the first two PT governments (2002 to 2010), there was an increase in PT and anti-PT identifications, with more expressiveness of the first, favoured at the time by expressive economic growth and social development. However, after a record period of approval, an unleashing of economic and political events melted the party's popularity from the second term of Dilma Rousseff (2011-2016) and anti-PT sentiment escalated to unprecedented levels.

On the economic agenda, GDP already showed signs of deceleration, unemployment rose again, and the pressure to balance public accounts increased, leading to unpopular fiscal adjustments. In June 2013, a wave of public marches against corruption marked the beginning of a dramatic moment for the government, which began to face a governance crisis, and accentuated ongoing institutional disputes.

Even with her popularity weakening and her party at the center of Operation Lava Jato, Dilma was re-elected in 2014, but her opponent Aécio Neves (PSDB), taking advantage of the growing atmosphere around corruption, alleged fraud in the elections. From then on, the PT government was shaken and faced growing popular rejection, which was aggravated by claims of “fiscal pedaling” and which culminated in the president’s impeachment in 2016 and the condemnation of former president Lula by Lava Jato the following year.

Eventually, the Operation also extended to the PSDB and other right-wing parties. The coup weakened traditional political figures in the field, highlighted a vacuum in the political right and propelled political dispute towards the radicalisation of the far right.

In this way, for the first time since the period of re-democratisation, shockwaves were sent through the main parties in the electoral contest, causing a strong movement in the balance of forces and a radical shift in government power; from the traditional left to the ultra-conservative right.

POLITICAL RUPTURE AND RISE OF THE FAR RIGHT

The intense polarisation after the election of Jair Bolsonaro has its genesis in this political soup prepared in recent years, namely anti-PT sentiment and “lavajatism”. A profound disqualification of politics and rejection of institutions followed, characteristic of a phenomenon seen globally which led to the rise of the far right in many parts of the world, such as Trump (USA), Salvini (Italy), Duterte (Philippines) and Orbán (Hungary).

Presenting itself as an “outlier” of the system, the current Brazilian government combines authoritarianism and neoliberalism in an innovative way, plus an agenda of strong social conservatism and religion, summarised in the slogan “Brazil above everything, God above all”. Mainly using social networks to reach their supporters and scorning traditional media vehicles as he did in his 2018 campaign, Bolsonaro mobilises his base through a reactionary tactics relating to public policy, civil rights, the electoral system or even democratic legitimacy. He contracted professional agencies to create large-scale fake news shots²⁰ and disseminate content replete with hate speech and defamation, aimed at destroying the opponent.

Consequently, a public debate around these ideological disputes has become irreconcilable, with less room for “halfway terms”. No wonder Brazil is currently among the nations with the highest rates of social tension, according to a 2021 study by Ipsos on “culture wars”. This found people see tension exists most between different political parties, ethnic groups, different religions, the rich and poor, and social classes. For 11 of the 12 groups presented, the amount of tension perceived by Brazilians is higher than the global average.

Consequently, disbelief in institutions opened space for an “anti” feeling as a generalised stance against everything related to “others”; a denialism that feeds a stereotyped and hateful view. The unprecedented use of digital channels reflected not only the increased tension between different political groups, the greatest symptom pointed out in the research, but also in other fields of social life.

DEMOCRATIC INSTITUTIONS AND THE “PAST THAT DID NOT PASS”²¹

The anti-system stance of the ultra-right can put further strain on institutional relations. We have seen threats of rupture and contempt for the Constitution from supporters and the president himself, expressed in

demonstrations that defend military intervention and the closing down of the legislative and executive powers, openly antagonising the Congress and the STF. The return of the military to positions of power is a problematic point as they occupy great influence and represent high-ranking sectors of the army with a revisionist vision of the Brazilian dictatorship, treating the 1964 coup as a “revolution”. It remains to be seen whether the mutually supportive relationship between Bolsonaro and the military could result in any institutional breakdown.

Also growing in Bolsonaro’s anti-system agenda is the narrative that alleges fraud in the 2018 elections and calls for paper ballots. The ultimate objective here is to create suspicions about the electoral system and weaken the opponent, if defeated. Bolsonaro threatened that without paper (vs. electronic) votes, there will be no elections in 2022, mimicking former US president Donald Trump. The more the polls point to the likelihood of his re-election, the more this agenda appears in his speech.

CONCLUSIONS: INFLECTION ELEMENTS

Analysing the current situation signals some possible inflection points in the 2022 elections.

First is the possibility of Bolsonaro and Lula being protagonists of the forthcoming election, as already indicated in Ipsos’ election polls.²² Thinking of the electoral scenario as a kind of referendum on the current government, “anti-Bolsonarism” reaches 59% of people who would never vote for him, which leaves the antipetismo for the first time in the background. At the same time, former president Lula regained his political rights in March 2021 and will be able to run in the 2022 elections. He currently leads voter intent in the first round and would beat President Jair Bolsonaro in the second with a wide margin.

CONSEQUENCES

	Total votes	Valid votes
Lula	48	56%
Bolsonaro	22	25%
Moro	5	6%
Ciro	4	5%
Doria	2	2%
Boulos	1	1%
Mandetta	1	1%
Luiza Trajano	1	1%
João Amoedo	1	1%
Subtotal	85	100%

Voters may have two options: keeping the current government by voting for Bolsonaro or changing him for someone they already know and has obtained high approval ratings in his government, by choosing Lula.

Second is the attempt to rearticulate the traditional right as an alternative to the “centre”. Without strong names in the polls and still weakened since the Lava Jato unfolding, the right tries to formulate what was called the “third way”²³, which will require an effort to adapt the parties’ image, as they were very close to Bolsonaro in 2018 and will now have to distance themselves from him in the political spectrum. An example of this is Governor João Doria, who made himself known for the viability of CoronaVac, differentiating himself from the Bolsonarist denialism, thus trying to erase the recent past that carried the slogan “BolsoDoria”.

The dismantling of these party alliances, as well as Bolsonaro’s departure from the PSL, could also drastically affect the electoral game. These two factors must be considered as 2022 will also elect state and federal governors, senators, and deputies, who all benefitted from Bolsonarism in the last election²⁴.

Third, regardless of what happens in the coming months, the parties will have to face a major technical-political problem. Cyber activism and the massive use of fake news will no longer be new, so the parties will have to be prepared

to defeat the far right in the digital world. The digital amplification of tensions, transmitted to the real world, will be worthy of close observation. Considering the pandemic has condensed the debates in the networks and blocked the possibility of protests (even though they are already taking place), we expect them to erupt during the election year, after the extensive immunization.

POINT OF VIEW

The year of 2022 may be the outcome of a unsettled episode in Brazilian democracy that began in 2013. It will also mark the end of a global pandemic and will be the stage for important elections for the country, certainly offering many turning points. Social networks remain part of the political reality and polarisation continues to determine electoral dynamics.

The PT reappears the main opponent of the far right, but is this a stable group capable of reelection? Apparently, it seems not. Meanwhile, the traditional right races against time to get a candidate and reposition itself as the centre.

As for Brazilians themselves, it remains to be seen whether they will endorse the administration that marks the unfortunate – and rising – number of 500,000 dead. Hope, however, can come from gathering in the streets, where there is enough life and warmth to dissipate tensions and open space for dialogue.



BEHAVIOURS: THE NEW NORMAL IS NOTHING NEW



Ayra Oliveira,
Innovation

TAILORED FOR AN UNCERTAIN FUTURE

Within this unimaginable crisis of a global pandemic, in which in practically all sectors of society are more distant from each other than ever, we are in spite of everything facing up to this reality, this temporary “new normal”, and dancing to its music.

At the time of writing, as Brazil is slowly recovering from the consequences of Covid-19, Brazilians are tired of isolation that has endured for almost a year and a half, marked by comings and goings restrictions and unsuccessful attempts to reopen. From February 2020 to March 2021, the Brazilian Social Isolation Index fluctuated between 23% and 62%, with this peak in March 2020 and in March 2021 is at 38%, a level that is still far from ideal.

The Brazilian health sector has been facing one of the greatest challenges in history. With a country that has been showing low investment both in public health and in scientific research, Covid-19 only exposed numerous problems that we were already facing.

THE IMPORTANCE OF PRESENCE

All the negative news surrounding the pandemic had countless consequences for people in Brazil. From calling for a more immediate way of life to alerting

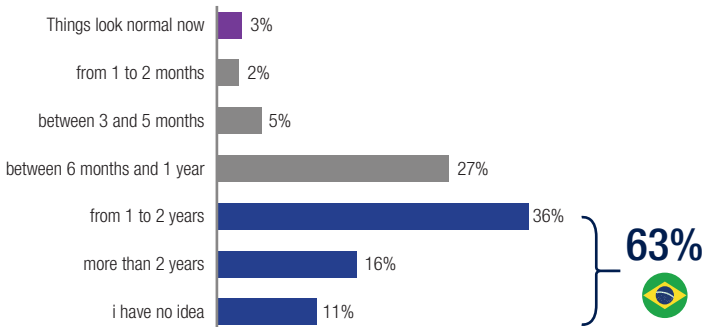
CONSEQUENCES

us of the importance of public health in an unequal country, the pandemic has given us a sense of urgency for the things that really matter. And what really matters? The answer to that question is something we all in some ways already know, or have, and it starts with relationships and human presence.

Human contact is important, especially for extremely social human beings like Brazilians. Regardless of age, gender or geography, we carry a longing feeling for intimacy with our loved ones.

A 2021 Ipsos survey shows that people do see a light at the end of the tunnel, but it is further away than we would like. Most respondents believe that we will return to normal within one to two years.

Return to normal

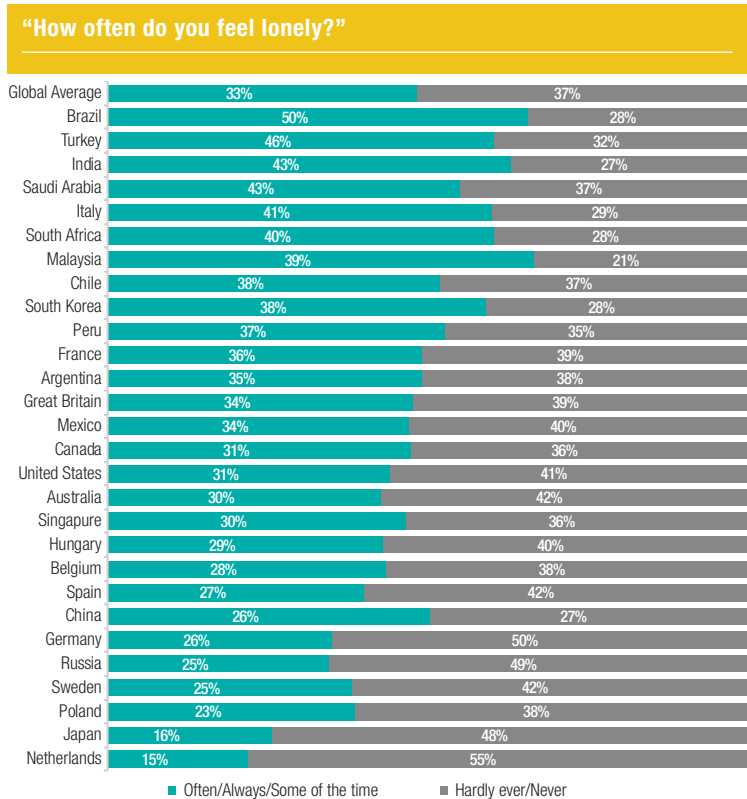


Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?
Base: EMEA: 5998, APAC: 5000, NA: 2000, LATAM: 1500

As far away as this future may be, we continue to hope that the worst will be over. Brazilians, however, are still suffering the consequences of the current context.

According to our survey on the perceptions of the impact of Covid-19, when asked "How often do you feel lonely?", Brazil ranked first, with 50% of respondents stating that they feel lonely very often.

The loneliest countries after Brazil are Turkey (with 46%), India (43%) and Saudi Arabia (also 43%). Over half of Brazilians also said that their loneliness had increased in the last 6 months.



A PROCESS OF ADAPTATION OR INDIVIDUALISATION?

Today, a different Brazilian exists compared to the non-pandemic world. We see someone already used to distance, more technologically aware, lonely, and more in control of their purchases. The division of daily time is also different, with more of it online. According to the National Telecommunications Agency (Anatel), Brazilians are now more connected in their daily lives, with

CONSEQUENCES

an increase of 40%-50% in internet use. This makes Brazil one of the leading internet-using countries in the world, ranked 3rd place with around 78% of the population connected.

As well as an adaptation process, this period was also a process of individualisation, which brought good and bad consequences for each of us and for society and collective life. This individualisation is apparent in education, with distance learning, and in the cultural sector, with an increasingly online repertoire.

According to the Association of Theater Producers (APTR), more than 350 plays were canceled in São Paulo and Rio de Janeiro alone at the beginning of the pandemic. With a reduction in the volume of creative content of almost half, the sector has been reinventing itself through the internet – the new way of accessing cultural content.

WHAT CAN WE LEARN FROM THE PAST?

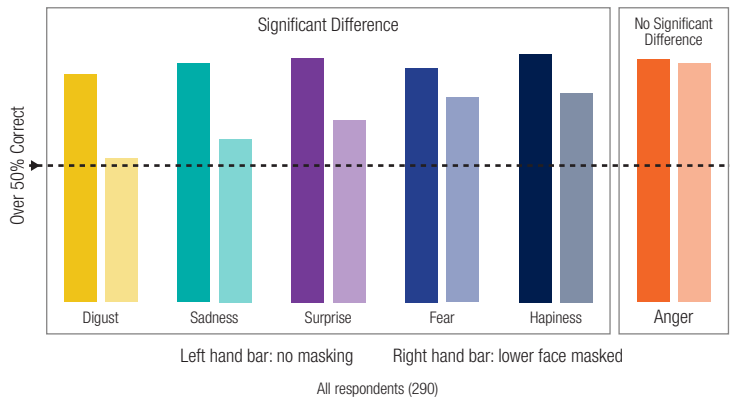
If there is a lesson to be learned from everything we have experienced, it is that our ability to adapt and find new solutions has no limits. Processes of adaptation are never easy, just as it is not easy to stop doing something we are used to doing on a regular basis. But without changes in the past, what is new today would not be possible.

NEW RULES FOR LIVING TOGETHER

Today, we are more adapted – or more individualised – because of rules that have been created and put into practice in society. A rule is defined in The Michaelis Dictionary as that which regulates, disciplines or governs. But, more than that, rules dictate a pattern to follow.

We probably all remember the first time we put on a face mask to go outside. Representing an uncomfortable acceptance that things have changed, it was one of the first rules we began to follow for living together during the pandemic. Although important in preventing the spread of the virus, it brought made social interactions more difficult.

A study by Temple University's Center for Applied Research in Decision Making in the United States, in partnership with Ipsos, is analysing the impact of using masks in language comprehension and relationship-building. In addition to these impacts, another effect of using masks is the difficulty in recognising emotions such as disgust, sadness and surprise.



AND NOW? HOW FAR DOES MY FREEDOM GO?

The new rules for living together not only reshaped a new way of behaving in society, but also created new boundaries lines on our freedoms. Walking this fine line either pushed individuals away from each other or made them relearn something they would do routinely. This can be a tiring process, but also enriching for both individuals and society.

A great example of this was the launch of Pix in November 2020 – a system which allows fast money transfers over smartphones and represents a milestone for money transactions in Brazil. In less than two months of operation, it became the most popular in the country and, in March 2021, Pix was responsible for handling 1 billion transactions, surpassing TED and DOC (two main forms of electronic transfers in Brazil).

While our everyday lives involve countless examples of limits to our freedom, this example from Pix shows another conception of freedom, at least in the financial sector. The boundary lines and patterns of behaviour in this case have been redefined.

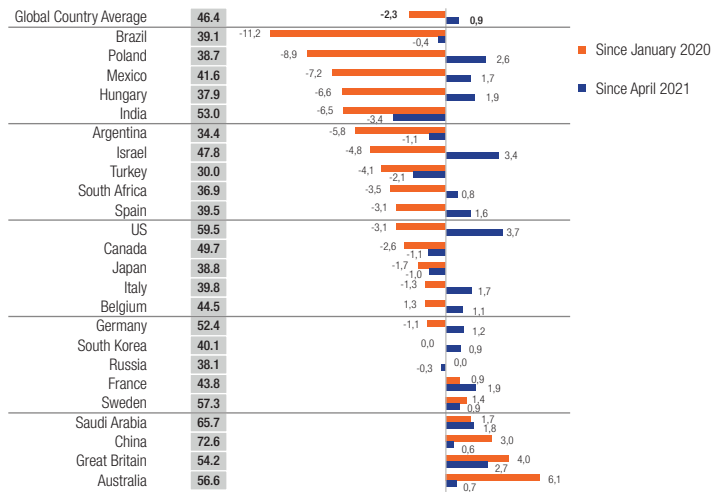
THE FUTURE: WHERE THE PAST AND PRESENT MEET

The recent past has taught us and shaped us a lot. In relation to consumption, today's consumer is more concerned with health, with their families, and with their future and the future of the country.

The September 2021 wave of What Worries the World, an ongoing global survey by Ipsos, indicated that the world's biggest concern is the coronavirus at 36%, followed by unemployment and poverty and social inequality (both at 31%). The survey also shows that 79% of Brazilian respondents think that Brazil is heading in the wrong direction – ahead of the global country average of 65%.

A lesson we can take from the recent past is that consumers are not the same as they were a year and a half ago. They are more concerned, but they are also more online, demanding and rigid with their purchases. The distance caused spending to be more closely calculated.

We also see a more cautious consumer. Ipsos' Global Consumer Confidence Index for September 2021 showed Brazil at 43.6 out of a total 100 points, showing the country emerging from a wave of declining results, but still below the global average of 48.6.



THE OTHER SIDE OF THE PANDEMIC

If on one hand we have a more calculating and concerned consumer, on the other we have a more adapted, technological consumer than a year and a half ago. Also in our “shopping during the pandemic” survey, 43% of consumers globally said they were shopping online more often than before the pandemic. This is slightly higher, at 47%, in Brazil. And it is not going unnoticed.

NOT A BARRIER, BUT A GATEWAY

Individualisation may seem like a big barrier to consumers for companies, but, in fact, it is a major gateway.

For example, the wave delivery services, a sector that saw Brazil leading in Latin America, as the country representing half of the market (49%), followed by Mexico with 28%, then Argentina with 12%. The data from São Paulo alone

CONSEQUENCES

is even more impressive. Orders in the capital have grown by around 45% since the beginning of the pandemic. While there is distance is still there, there are still opportunities.

A DIFFERENT GATEWAY: MORE TOUCH!

An example of innovation as a result of our more distanced interaction has been growing in restaurants since the beginning of the pandemic.

A result of distancing is the distrust of touch – proof of which is seen in the bottle of alcohol gel at almost every point in stores and restaurants. The menu was an important point of contact that soon needed to be reshaped to something not shareable. Today, through this, we have the popularisation of QR codes.

POINT OF VIEW

Now is the time. The use of QR Codes is just one example of taking advantage of new opportunities that are emerging in society. But every day we see different innovations coming to the market, many of them to solve the pains we've been facing throughout this process of individualisation and adaptation.

Living in society has never been easy, and it is no different now as are reorganising and rediscovering our freedoms with each day. Boundaries that were once well demarcated today are more imperceptible and uncertain, creating doubts and fears. But this opens space to give new meaning to the most deeply rooted concepts of togetherness now and into the future.

If consumers today are more technological and immediate, many more doors of opportunity are opened than barriers raised.



SOCIETY: THE HOME OFFICE AND THE EXODUS OF THE ELITE FROM THE CITY



Melina Mesquita,
Ipsos UU

Even about a year and a half after the start of the pandemic, Covid-19 continues to impact our lives in different ways: routines, consumption, priorities, limitations, leisure, work... the list goes on.

A LOT HAS CHANGED IN OUR LIFESTYLE, INCLUDING WHERE WE LIVE

Social isolation measures and the consequent restrictions on face-to-face work have opened up a new range of possibilities to a portion of the population, who are now able to carry out their professional activities remotely, requiring only a computer and reasonable access to the Internet.

First, it is worth noting that this is only a reality for a restricted part of the population, markedly more open to the upper classes, given their broader access to opens and places to stay, as well as occupying more administrative positions.

In fact, the so-called “digital nomads” have been working remotely in this way for some years now, moving from between different cities and countries. But what we are witnessing now is that remote work has become more widespread and has gained new contours.

Most of the workforce in services and industry continued in face-to-face work, the home office not being a possible alternative for them. Even so, there are

important implications of this trend that reach a wider audience.

According to the Ipsos Essentials survey in April 2021, there was an increase in the number of people working in home offices in Brazil – representing about 25% of the population.

Working situation “primarily from home” (%)



“The Global Country Average” reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country and is not intended to suggest a total result

Q. Wich best describes your workplace right: now? Base: Employed: 9627

Given the opportunity, some people chose to leave the big cities and start living in smaller places, taking their work with them and adapting the home office to their new habitat. In this way, they sought to combine leisure and quality of life in their routines. This was more difficult to achieve in a large city during a pandemic, with restricted movement of people and the closing down of establishments and public facilities.

Knowing many people who have chosen to follow this path, whether family members, friends, co-workers or clients, and having personally experienced this reality for certain periods of time, I will outline some brief reflections on the new dynamic of post-pandemic work.

NEW MIGRATIONS

No matter the setting, whether countryside, beach, isolated properties or within small towns, working remotely in a context previously intended for leisure, despite all the advantages, can also bring some difficulties.

The regime of the home office regime can make people feel unable to fully dedicate themselves to work or leisure time. They always walk in parallel, intermingling and overlapping. Structural issues including access and distance from a support network also come into play.

This form of migration impacts the cities that receive new inhabitants. There is the positive side of a larger consumer base for the commerce and services sector, but it also raises concerns about the local infrastructure as these cities are often not prepared to serve this new public. They begin to suffer a new series of daily setbacks such as traffic, sanitation problems, and food supply. Depending on the volume and characteristics of this migration, the city may undergo changes in its urban dynamics or even suffer a kind of gentrification.

Likewise, large cities are affected this new reality. On the one hand, there is less circulation of vehicles and people, which can be positive for mobility. However, some sectors suffer the decrease in the number of people as they completely lose or serve these migrant customers less frequently.

This distance from the reality of the metropolis changes the feeling of belonging to the city and even notions of citizenship. In this sense, the raw reality of the big city, with all its “snags” reinforced by social inequality, is no longer so visible in everyday life. It may not seem a concern to those who no longer walk in that space.

From all these perspectives, migration caused by the pandemic and made possible by remote work brings a series of challenges, whether for cities or the world of work.

Cities need a series of structural and urban adaptations to better support

CONSEQUENCES

a new influx of inhabitants. And, without their daily circulation of people, the emotional bond with cities are at risk of weakening, and must be strengthened, especially among those who intend to return to them. The sharing of experiences within the public spaces of cities is fundamental for the construction of the notion of belonging to the social whole and for the solidification of citizenship.

With reference to work, companies and employees were introduced to a new *modus operandi* that appears not to be temporary. Commuting and ways of working are being revised and continue to follow new patterns even after the pandemic has slowed down. The home office is here to stay. With it is the need to adapt routines and set limits so that productivity and quality of life can coexist happily, regardless of the geographic location.

POINT OF VIEW

For brands, new opportunities arise from this migration, especially those in the sectors of commerce, services and mobility. They now have the mission of equipping these cities with the infrastructure to serve new residents.

This adaptation is already visible in many cities around São Paulo with the opening of branches of more premium supermarket chains, expanded telecoms services, hospital networks with greater coverage, and so on.

However, there is still a lot of space to be occupied to better serve the migrant audience, regardless of where they are.



INDULGENCE DURING THE PANDEMIC: IS IT SOCIALLY ACCEPTABLE?

The established social consensus that established a large part of the rhythm and rules of coexistence in a pre-pandemic world now seem distant references.

After almost two years of a pandemic that isolated us, we have found ways to readjust ourselves to continue living within this unpredictable scenario.

We all developed different behaviours to cope with the situation. One such is an increasing tendency towards indulgences.



Gabriela Sievers,

Ipsos UU



Suzana Villaverde,

Ipsos UU

INDULGENCIES OR DEPENDENCIES?

There is a dangerous zone between the search for pleasure, the adoption of risky practices and the creation of dependencies.

Data from the Brazilian Ministry of Health show that, in networks accredited by the Unified Health System (SUS), the search for medical care using hallucinogens grew 54% between March and June 2020, the first months of confinement in the pandemic, in comparison with the same period of 2019. The same for the use of sedatives increased by 50%.

CONSEQUENCES

At the end of 2021, we see more evidence of efforts to curb compulsive behaviour, such as aiming to reduce the consumption of pornographic content and the launch of applications like Remojo that block access, which shot up in 600% between March and June 2020, according to a report by Netskope, a US security software company.

A survey carried out by CO.Lab, an Ipsos community, among over 100 people from the five regions of Brazil found that 81% of the participants declared that they are allowing themselves more indulgences during the pandemic, and that this has been fundamental for the maintenance of their well-being.

Among the indulgences, the most frequent relate to food and greater freedom through relaxing the rules of day-to-day life.

Shopping, increased alcohol consumption, and longer breaks during home office work also appeared as personal indulgences. Faced with the scenario of isolation, concerns about health, financial stability and other uncertainties, the online community say that indulgences help them to “escape” and manage the bleak situation, allowing moments of pleasure and happiness in small things that were previously restricted.

OUTLETS OR STRESSES

This burst of quick satisfaction and comfort happens especially through the consumption of tasty, often more expensive and calorific food usually eaten more infrequently. As Cervantes wrote “with bread all the sorrows are less”, today the pandemic has made even wellness gurus such as Gwyneth Paltrow, owner of the Goop lifestyle brand, admit that she spent the first months of the pandemic consuming whiskey and bread, something she saw as completely “off the rails”.

If it is known that heavy consumption of alcohol and carbohydrates is not the path to a healthy life, to what extent were some of our other pre-pandemic

habits also damaging to our lives? Spend the day in more comfortable clothes, sleeping a little later, growing a beard, and not wasting time on personal grooming came as a relief to some CO.Lab participants. The pandemic routine seems to provide greater freedom and space for people to feel pleasure by allowing themselves to do what they want and not necessarily what they should do.

“I FEEL FREER... BECAUSE I’M DOING
SOMETHING I WANT AND THAT
WASN’T NORMALLY ALLOWED OR
POSSIBLE. I FEEL FULFILLED.”

WOMAN, RIO GRANDE DO SUL, 34 YEARS OLD

“I FEEL VERY HAPPY, DO YOU KNOW
WHY? BECAUSE I SIMPLY DESERVE
IT... I’VE BEEN THROUGH SO MUCH
THAT I DESERVE A MOMENT OF
INDULGENCE, YES, IN FACT,
I DESERVE SEVERAL.”

WOMAN, RIO DE JANEIRO, 34 YEARS OLD

In this way, demand for treats has exploded and food delivery apps, another pandemic indulgence, have registered an increase.

Data from iFood from March 2020 show growth of 78% in bakery purchases, 61% in sweets and cakes and 56% in ice cream. Brands that detected this trend placed their bets on more indulgent products, such as Danone, who announced the creation of more products with a greater variety of flavours and textures geared towards immediate satisfaction.

WORSENING INEQUALITIES

Although the indulgence movement seeks to rescue pleasure for consumers, it is essential to realise that in the Brazilian pandemic scenario, extended by the lack of vaccines and frightening unemployment rates, some people interpreted the situation differently and, being alert to the dangers, focused on maintaining control, afraid of the consequences of losing their way at a time of such social and economic uncertainty.

CO.Lab members who say they no longer engage in indulgences during quarantine understand that they need to maintain the same standards, or further restrict themselves, in order to keep a handle on the situation.

Once again, this paints a picture of the unequal situation in Brazil. A 30-country Ipsos survey found Brazilians were the ones who gained the most weight during the pandemic: 52% claimed to have gained weight with an average weight gain of 6.5kg.

On the other hand, more than 116.8 million Brazilians have experienced some degree of food insecurity, including 43 million without enough food and 19 million starving. This cut of the population is skewed by gender, race and region as most of those affected by hunger are women, heads of the family, black citizens and households in the North and Northeast²⁵.

“I’VE BEEN CUTTING OUT ALL KINDS OF INDULGENCES. LIVING COSTS ARE VERY EXPENSIVE, THIS IS A MOMENT OF ECONOMIC, HEALTH AND SOCIAL INSTABILITY, SO I’VE BEEN CONTAINING MORE UNNECESSARY EXPENSES.”

WOMAN, SÃO PAULO, 40 YEARS OLD

POINT OF VIEW

With a tragedy in the background, the possibilities of our livelihoods are interfered with, no matter how we navigate it. Although constructing new attitudes or even addictions take a long time to do or be undone, we still need to better understand if these habits, guided by excess or elimination, are here to stay.

More importantly is to realise how our ways of dealing with challenging times can give us keys to understanding how pleasure and comfort are vital for survival - and the importance of seeking a balance that values both the external connection with others and also that more intimate space only for ourselves.



BRAZILIAN BRANDS: WHAT WILL THE FUTURE BRING?

How is the consumer's relationship with brands during the pandemic? Have people become more loyal to their favourite brands? And these brands, what have they been doing? How are they working to engage and delight their customers? Who has adapted best to this moment? Who has bridged the distance imposed by the pandemic to create new connections, even online?

All these questions are very important and relevant if we are to understand the relationship between consumers and brands at this time. Knowing how consumers see brands and their conduct during the pandemic is vital as brands need to consider their real role in society when getting closer to consumers.



Thiago Ramos,
Global Modelling Unit

Today, consumers do not only take into account the characteristics and quality of products and services offered. They also increasingly give consideration to the positioning, values and principles adopted by the brands. Social and environmental outcomes and diversity and inclusion are among the important factors in consumer choices.

The pandemic has made consumers begin to identify the brands that are most engaged with individual and collective wellbeing.

Numerous brands in Brazil and around the world announced measures they have taken to help the community to overcome the delicate and unprecedented crisis. At the speed that the disease spread, brands had

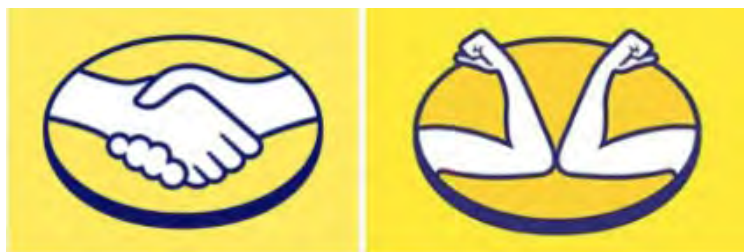
CONSEQUENCES

to create creative solutions to guarantee the supply of their products and services as well as help raise awareness and fight the pandemic.

Several actions were apparent such as changing logos, manufacturing supplies to help prevent and treat the disease, and cash donations. Companies like Mercado Livre and Audi drew attention to the issue of social isolation.

Other companies including L'Oréal and Ambev announced plans for the manufacture and distribution of alcohol gel and other measures to help communities in need.

BR Distribuidora donated more than 20,000 liters of ethanol to universities in Brazil to assist the production of 70% alcohol for sanitation. In addition to donations to projects that help to combat Covid-19, companies such as Starbucks and Heineken announced measures to help their employees.



DID BRAZILIAN BRANDS UNDERSTAND THIS CHANGE?

Among national brands, we have to make a distinction between large companies such as Magalu, Natura & Co and Havaianas, and the small and medium-sized local retailers and entrepreneurs, as this second group has suffered and continues to suffer a lot from the pandemic.

However, now let's talk briefly about how three large companies acted and showed themselves to stay close to their consumers through management and commitment to social causes.

1. Natura & Co

Two aspects usually come to mind when thinking about Natura: its history of sustainability and the army of consultants selling the brand's products daily. During the pandemic, more than ever, these two ends came closer.

In addition to extending and facilitating payment for product orders, the company created an emergency support fund to support resellers, who also had access to psychological support and telemedicine services, as along with other employees.

To circumvent restrictions on in-person sales, the company accelerated the use digital tools in the Natura and Avon brands eCommerce offering, which in the third quarter of 2020 surpassed the mark of 1 million online consultant stores.

2. Havaianas/Alpargatas

Step by step, Havaianas, a company of the Alpargatas group, carried out several measures during the pandemic, adding up to total of \$ 40 million Reales. All movements were guided by two major fronts: support for health professionals, and support for vulnerable communities.

For the first group, the company adapted its factories to produce medical masks and special shoes for professionals on the front lines of the fight against Covid-19. It produced and donated 1.3 million surgical masks, 2.2 million fabric masks, 250,000 pairs of Havaianas, and 25,000 pairs of professional shoes.

3. Magalu

With its 1,237 stores closed as of mid-March 2020, Magazine Luiza decided to open the doors of its marketplace so that smaller retailers and individuals could sell through its portal.

Overnight, the Trajano family's retail chain created Parceiro Magalu, an internet sales platform for those who had to close their doors and did not have an online channel to sell their products. The tool allows you to build your own store with Magazine Luiza items and earn a commission for sales. In the first week, the platform had 20,000 users.

Magazine Luiza also took other less high profile actions. One of them was combating violence against women by implementing a whistleblower button in its app. The company saw a 400% growth in clicks on this button at the start of the pandemic. Based on this data, it decided to include more features, such as an online chat function so that complaints could be made without the need to use voice.

Brazil saw a growth of almost 15% in the number of individual micro-entrepreneurs in 2020. However, for business to prosper, they must be well managed, with a proactive and creative leader to capture consumers.

BUSINESSES BORN OUT OF THE PANDEMIC

Minha Quitandinha

In their project of a minimarket for condominiums, Minha Quitandinha, came up with the proposal of making people's lives easier, bringing convenience, practicality, safety and health to customers, residents and managers in this sector.

It is a market that can be installed in any space, with several options of store models from the smallest to the largest. The most complete includes beverages, frozen items, refrigerator items, cleaning items, hygiene items and general groceries.

Soulnord

Lara Luiza Oliveira had been engaged in fashion for five years when the pandemic began. The moment fabric masks became mandatory, she started making her own. Afterwards, she decided to help her fiancé, who had difficulties in protecting his long beard. His bearded protection model was so successful on social media that he created a new brand, SoulNord.

Marmitaria das Meninas

The emergency aid of \$600 Reales was all the incentive that Maria Celia Sousa, from Tocantins, needed. With the money that was left over from the benefit, she set up her dreamed of "junk delivery service" with her daughters. Its success has lead her to start planning a physical store.

CONSEQUENCES

POINT OF VIEW

What are the paths?

Reinventing and changing industries during a pandemic is very difficult and complicated, but as we saw with the creativity, proactivity and quality put into deliveries, business can thrive, and some have managed to keep improving and growing.

Another important point is the good use of online tools such as Instagram, Facebook and YouTube, which generate engagement, proximity to consumers and promote brands.

POST-COVID POINTS OF FOCUS



POST-COVID HEALTH: ARE WE OKAY? THE PANDEMIC AND NEW DEFINITIONS OF WELLBEING

“Hey, how are things?”. This very common question has gained different depths and meaning since the beginning of the Covid-19 pandemic. Levels of concern for the wellbeing of other people has definitely increased. Our basic conception of being “well” has acquired new layers that relate to our physical and emotional health as well as family conditions.

Therefore, “yes, I’m fine” is no longer so automatic and is frequently qualified: “I’m okay, given the circumstances” or “as much as can be”. Feeling really good in a crisis situation is difficult, and can cause people guilt and embarrassment when thinking of the less fortunate realities of others. “Pandemic fine” is a term that has been used to describe this new way of being well in Brazil. Being healthy, having a job, not going through grief, and having healthy family members, all while feeling sad, hopeless, and physically and mentally tired at the same time.



Helena Junqueira,
Ipsos UU

CORONA BLUES

Just as the pattern of wellbeing has changed, so has the pattern of suffering. If everyone is feeling bad on some level, what distinguishes this collective malaise from a pandemic of depression? Philosopher Byung-Chul Han²⁶ spoke about the “corona blues”, coined by the Koreans to describe the general depressive state that spread and took hold during the pandemic. The social model that

had already been leading us to mental exhaustion – as defended by Han in his book²⁷ “The Burnout Society” – was aggravated by a virus that isolated us in our homes, drastically reduced our social contact, destroyed daily rituals, and increased our exposure time to screens.

This feeling of exhaustion has been noticed in Brazil and globally, as shown by an investigations by Ipsos in 28 countries for the World Economic Forum in December 2020. The deterioration of mental and physical health is the main threat seen by the public in the face of the pandemic, selected by 62% of respondents, followed by loss of income or employment (61%).

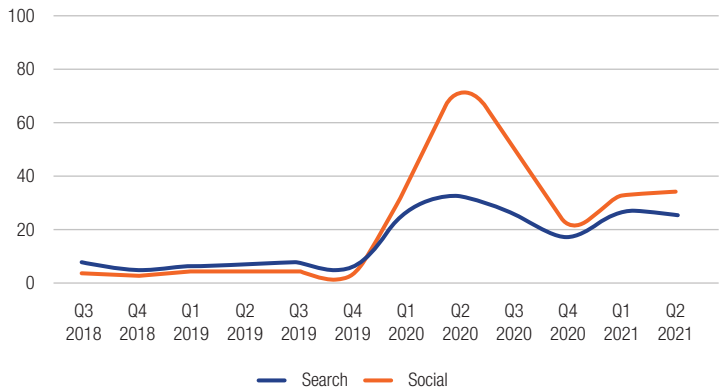
After one year of Covid-19, another study in March 2021 found that 53% of Brazilians and 45% on average globally have experienced their mental and emotional health change for the worse since the beginning of the pandemic.

ARE WE OKAY IN THE HOME OFFICE?

For a huge portion of the most privileged population, the pandemic transformed the work structure and relationships with the adoption of the home office. Companies and employees were forced to quickly adapt to remote work, learning by doing, and without time to prepare and adopt best practices.

An Ipsos survey on the pandemic's impact on workers' lives in December 2020 found more than half of the connected population in Brazil and worldwide had started to work from home. The indexes of Google searches and conversations on social networks show how the home office has definitely entered the daily life of Brazilians.

Home office



Evolution of search indexes on Google ("Search") and conversations on social networks ("Social") about home office in Brazil. The index does not represent the absolute number and its highest value is 100. Sources: Google Trends and Synthesio.

However, the survey also revealed how work during the pandemic period has been a trigger for stress, anxiety and fatigue. The convenience of the home office, under the conditions in which it was established, did not mean greater tranquility for Brazilian workers, for some key reasons:

- **Time management:** around half found it difficult to find a balance between their personal and professional lives, started to work in unconventional hours and saw their productivity drop.
- **Anxiety:** 60% felt more anxious due to job insecurity, and 56% due to changes in the organisation and their work routine.
- **Structure:** half of respondents had difficulty working at home due to inadequate equipment or home office space.

- **Family life:** 45% experienced stress at work because of family pressures – especially women, who had primary care responsibilities for the home and family.
- **Lack of social contact:** 48% feel more alone or isolated working at home.

All these factors point to an increase in Burnout Syndrome, which, despite having been affecting workers around the world for decades (the term was coined by psychologist and researcher Christina Maslach in the 1980s), has only entered the World Health Organization's international classification of diseases in 2019, as an occupational illness. The disorder is a result of chronic stress in the work environment, causing physical and mental exhaustion in the patient who feels unable to operate as before. The latest official data from the International Stress Management Association²⁸ (ISMA) in Brazil from 2018 already indicated that 32% of Brazilian workers suffered from the syndrome.

However, there is strong evidence that this is increasing after the Covid-19 pandemic, as pointed out by mental health professionals in various statements to the press²⁹. The survey "Human Resources in the New Age: Remote Work and Well-Being", carried out by Capterra in January 2021, indicated that 37% of workers in small and medium enterprises (SMEs) have experienced moderate to extreme symptoms of burnout since the adoption of home office, in addition to another 33% with mild signs. Among the main symptoms, headache (41%), difficulty concentrating (37%), sleep problems (34%), and feelings of loneliness (26%) were mentioned.

LONELINESS AND POOR SLEEP

Loneliness was also addressed in an Ipsos survey from February 2021 which found 33% of respondents in 28 countries have often felt alone. In Brazil, this number rises to 50%, putting us in first place in the ranking. The general perception is that pandemic months have increased feelings of isolation and non-belonging: 41% of the global average and 52% of Brazilians reported feeling more alone in past six months preceding the survey.

It is undeniable that the greater distance from friends, family and co-workers as a result of the pandemic increased our perception of loneliness. And this cannot always be remedied by more digital contact. But it is worth remembering that the current social model of our era was already drawing us to a state of greater loneliness.

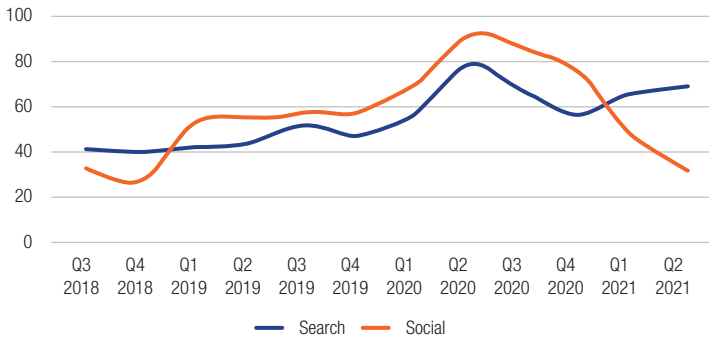
An indication of this problem is the fact that young people are most affected public. The BBC Loneliness Experiment³⁰ from 2018 found one in four people aged between 16 and 24 years said they often felt alone. With the pandemic arriving on the scene and further isolating us, concerns arise about the possible future emotional and physical consequences, as chronic loneliness is associated not only with mental disorders but also with increased risk of cardiovascular disease, lower immune response, greater risk of premature death, and increased blood pressure³¹.

Health can also be seriously harmed by poor sleep quality, another problem associated with the Coronavirus crisis to the point that the disorder has its own expression: “coronasomnia”.

The Ipsos Coronavirus tracking survey in May 2020, revealed that 26% of Brazilians have faced insomnia as a consequence of the pandemic. The Brain Institute of Rio Grande do Sul (InsCer) found that seven in 10 people they interviewed qualified with a sleep disorder³², versus just three in 10 before Covid-19 isolation.

Google searches and social network conversations show how insomnia became a concern for Brazilians during the first months of social isolation, which began in March 2020.

Insomnia



Evolution of Google search indexes ("Search") and conversations on social networks ("Social") about insomnia in Brazil. The index does not represent the absolute number and its highest value is 100. Sources: Google Trends and Synthesio.

WE ARE LESS HEALTHY

Health risks could be mitigated by physical activity, but the World Health Organization points out that almost half of Brazilians did not exercise regularly before the pandemic³³. Data collected over 2001 and 2016 and show that women tend to be even more sedentary: 53% versus 40% of men.

The National Household Sample Survey (PNAD), by the Brazilian Institute of Geography and Statistics (IBGE), indicates that six in 10 Brazilians did not perform physical activity between September 2014 and September 2015³⁴, again with a higher incidence of sedentary lifestyles among women. This also showed to a decreasing degree with age and a increasing degree by level

of education and income. That is, the younger, more educated and higher earning an individual is, the greater their tendency to exercise regularly.

During the pandemic, in which isolation was necessary to prevent contagion, the situation worsened. A study by the University of São Paulo's School of Physical Education and Sport (EEFERP) showed that the first 16 weeks of social distancing reduced by 83% physical activities for women between 50 and 70 years old³⁵. The Ipsos survey on diet and health during, carried out in 30 countries in January 2021, places Brazil in fourth position in terms of exercise reduction since the beginning of the health crisis, and in first position for weight gain.

The impact on Brazilian's weight during in this period is also linked to uncontrolled eating as a mechanism for compensating for anxiety. In the Ipsos Coronavirus tracking survey, Brazil again topped the ranking as the country where most people are overeating because of isolation: one in four people admitted to eating more than they think they should. This problem mainly affects women, who are more prone to anxiety and weight and self-image disorders.

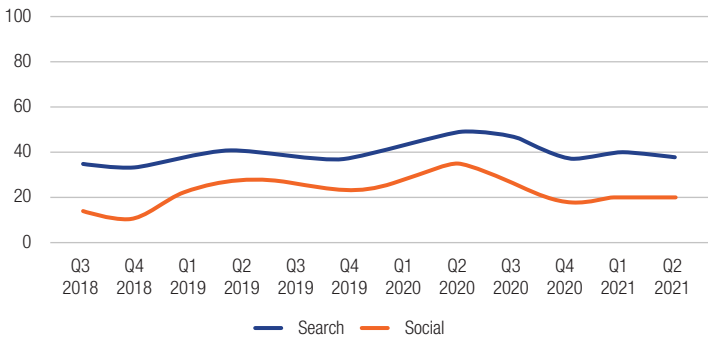
In addition to food, alcohol has also been used as a way of coping with the negative emotions caused by the pandemic. 16% of Brazilians increased the frequency of alcohol consumption and 2% started smoking, according to the earlier mentioned diet and health study.

A survey on alcohol use and Covid-19 by the Pan American Health Organization (PAHO) showed an increase in episodic heavy drinking (EHD) – a behavior that represents the consumption of five or more drinks in one single occasion – for 35% of respondents in Latin America and the Caribbean aged between 35 and 39 years³⁶.

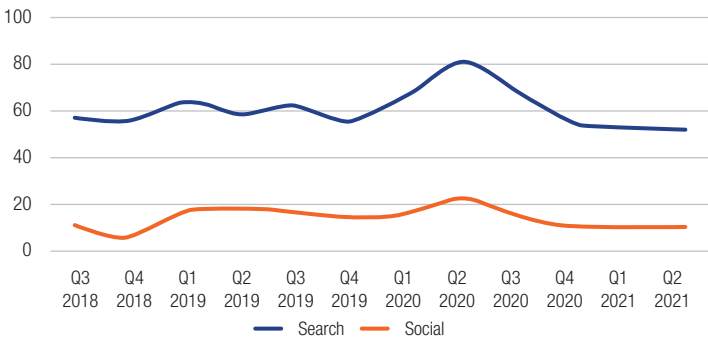
WE ARE TRYING TO BE FINE

Despite all the data pointing to a negative scenario, many people have adopted positive strategies to deal with social distancing. Google searches and conversations on social networks about meditation and yoga, practices that benefit mental and physical health, peaked shortly after the start of the pandemic, in the second half of 2020, when the public were looking for ways to relieve tension and adapt to isolation.

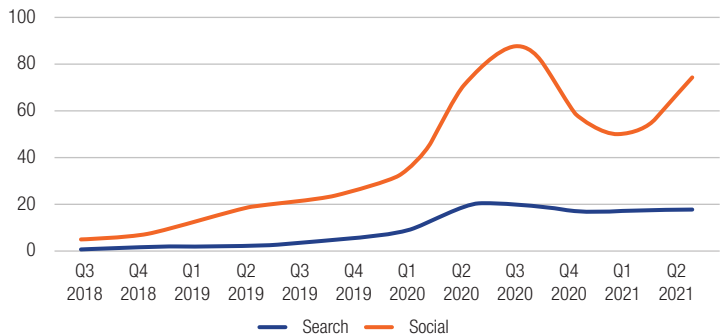
Meditation



Yoga



Skincare



Evolution of search indexes on Google ("Search") and conversations on social networks ("Social") about meditation, yoga and skincare in Brazil. Google Trends and Synthesio.³⁷

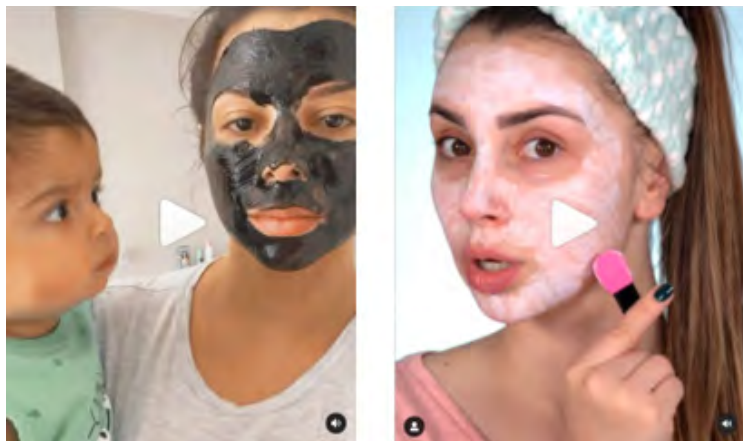
SELF-CARE

Another theme that had great prominence was skincare. Driven by isolation at home, this gained the status of self-care, comfort, and encouragement of wellbeing.

Heightened interest in skincare today is evident online activities, as measured by Google. Skin care seems to have definitely entered Brazilians' daily routine. Social networks became a place for exchanging product tips and routines – not only from influencers, but also from common consumers – with new users entering the category and new habits being created. Consumers have turned their home into a laboratory for skincare experiments, seeking information on the internet, risking new purchases, and sharing their discoveries and learnings in online environments.

The transformation was quickly noticed by the cosmetic industry which saw a significant increase in sales of products such as face masks (+27%), anti-wrinkles (+13%) and eye creams (+17%), according to a survey by the

Association Brazilian Industry of Personal Hygiene, Perfumery and Cosmetics (ABIHPE)³⁸ which compared the first five months of 2020 with the same period of the previous year.



Digital influencers use Instagram to promote pandemic skincare tips. In the photos, Evelyn Regly (6.1 million followers) and Janaina Taffarel (1.4 million followers) in photos published in July and May 2020, respectively. Follower numbers obtained on July 5, 2021

WE ARE OPTIMISTIC

This search for positive habits and attitudes is reflected in prospects for the future. Despite all the impacts of the pandemic, Brazilians are optimistic and believe in a return to normal life in a not-too-distant future. Brazil's indexes are higher than the global average placing it among the most optimistic countries among the 30 markets studied.

One of the strongest positive aspects brought about by the pandemic was the sense of community, linked with the spirit of solidarity. Support for small producers gained momentum in the early months of isolation, when prospects for closing commercial establishments brought serious economic concerns.

Social networks were once again the stage for messages of support and dissemination of local production and commerce initiatives, using hashtags such as #buyfromwhomakes and #buyfromthesmallproducer. Instagram launched and still maintains a “support small businesses” stamp for users who want to publicise and demonstrate support for small producers in stories.

In general, and not only with regard to trade, solidarity reached new strengths as 36% of Brazilians believe their community has become more supportive in recent months, according to the Ipsos study from February 2021.

POINT OF VIEW

Solidarity also involves, to some extent, the acceptance of sadness. If we are all going through such a troubled moment together, we see and feel each other's pain. We are more understanding about individuals' emotional states, and we are starting to see mental health being openly discussed by the media, companies and social groups.

“Being well” in 2021 definitely doesn't mean what we thought it might a few years ago. We are in mourning, not only for those close to us and for all the lives lost in Brazil, but also for a way of life that has been lost and that may never come back. But we haven't lost the ability to adapt, reinvent ourselves and build a future – and why not make it a better future?



PHYSICAL ACTIVITIES: WHAT HAVE WE BEEN DOING, WHAT WILL THE NEW HABITS BE?



Ana Patrícia Siqueira,

Brand Health Tracking

MENS SANA IN CORPORE SANO (HEALTHY MIND IN A HEALTHY BODY)

Not just about appearance: physical activity means health, wellbeing, mood improvement, longevity, and social inclusion, among other benefits.

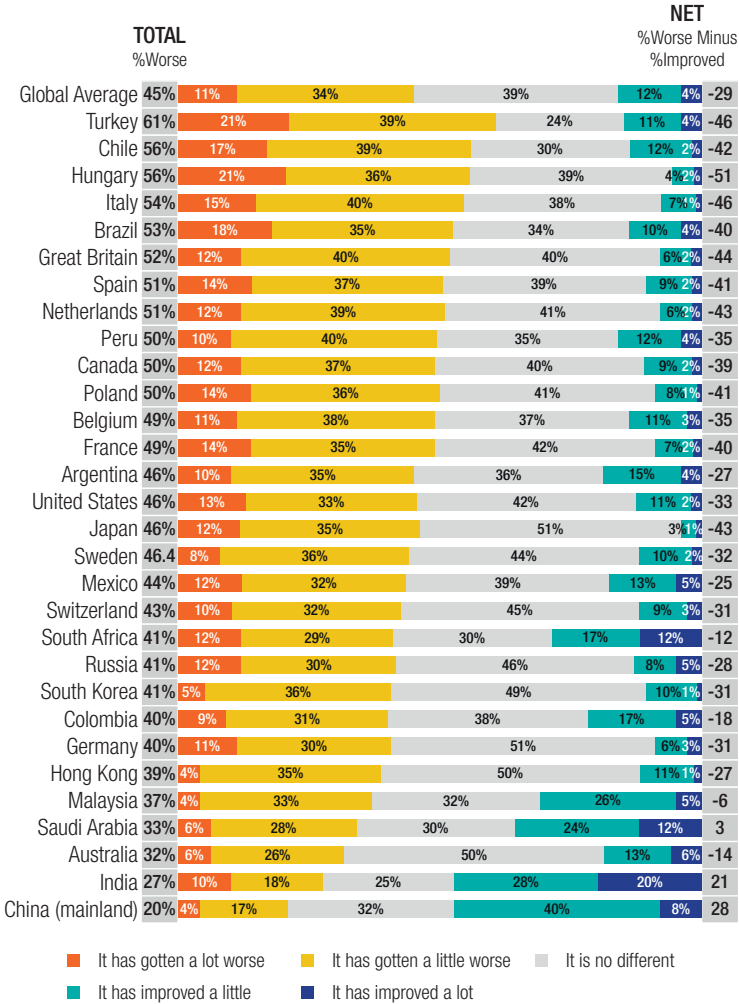
The unfortunate truth is that, despite the many positive aspects, the Brazilian population performs very little physical activity. In 2018, the World Health Organization (WHO) released a study with information collected over the past 15 years that revealed Brazil is one of the countries with the worst inactivity rates in the world: 47% of the population does not practice physical activity enough, making it the leader in the ranking of sedentary lifestyles in Latin America. Sufficient physical activity, according to the WHO recommendation, is considered at least two and a half hours of moderate effort activity per week or 75 minutes of intense activity.

As we know, a more sedentary population brings with it other numbers: increases in obesity, chronic diseases such as hypertension, anxiety, depression, and the retraction of a healthy ageing process.

This scenario becomes even more worrying in a society weakened by a long period of pandemic and its effects of economic crisis, unemployment and financial insecurity.

A recent Ipsos study for the World Economic Forum revealed that 53% of Brazilians suffered emotional shocks such as anxiety, stress, and depression.

Brazil ranks fifth among 30 countries for the highest incidence of worsened mental health symptoms during the pandemic.



AN EMERGING CONCERN: THE DROP-OUT

We learned from the Tokyo Olympics that mental health matters and will be a topic that is still widely discussed. The vulnerability of an athlete like Simone Biles fueled debates that impact not only athletes, but consumers and the corporate world as well.

ALEXANDRE PADUA **Precisamos falar da saúde mental dos atletas e de todos nós**

Os aspectos da saúde mental dos atletas nas Olimpíadas de Tóquio trazem à tona o debate psicológico, que vai além da dificuldade emocional causada pela pandemia

Por Alexandre Padua | para a F&B

Publicado 02/08/2021 - 19:07

We need to talk about the mental health of athletes and all of us. Aspects of mental health of athletes at the Tokyo Olympics bring up the psychological debate, which goes beyond the emotional distress caused by the pandemic.

Exame

Debate sobre saúde mental dos atletas também tem espaço

...

Debate sobre saúde mental dos atletas também tem espaço no futebol. Caso de Simone Biles, nos Jogos Olímpicos de Tóquio, evidenciou a ...

5 hours ago



*Debate on athletes' mental health also has space
Debate on the mental health of athletes also has space in football.
Simone Biles' case at the Tokyo Olympic Games highlighted the...*

CNN Brasil

Saúde mental: como a pressão psicológica pode prejudicar o desempenho de atletas

Segundo Marilene, a pressão psicológica sobre os atletas pode levar ao desenvolvimento de quadros mais graves de saúde mental. "Se um atleta não

...

2 weeks ago



*Mental Health: How Psychological Pressure Can Harm Athletes' Performance
According to Marilene, the psychological pressure on athletes can lead to the development of more serious mental health conditions. "if an athlete"*

ISTOÉ Independente

Saúde mental dos atletas entra no foco dos Jogos Olímpicos

Depois da ginasta norte-americana Simone Biles desistir de disputar várias finais nos Jogos Olímpicos para cuidar da sua saúde mental, ...

6 days ago

*Athletes' mental health comes into focus Olympic Games
After the American gymnast Simone Biles gave up playing several finals in the Olympic Games to take care of her mental health...*

ONLINE EXERCISE: A PANDEMIC-ACCELERATED TREND?

The good news is that those seeking to exercise at home or outdoors has increased during the pandemic. Working and studying at home became the reality for many people and when it comes to physical activities, this was no different. On the internet, we were able to follow the boom in online classes, including on social networks such as Instagram.

Google Trends shows that exercise was the most searched subjects relating to 'at home' in 2020.

Em casa

- 1 Exercícios para fazer em casa
- 2 Como fazer máscara em casa?
- 3 Fotos em casa
- 4 Horta em casa
- 5 Academia em casa

1. Exercises to do at home
2. How to make a mask at home?
3. Photos at home
4. Home Garden
5. Gym at home

Brazilians have also become more interested in physical activity with the growth of the bicycle market, which saw an increase in sales of more than 100%, in the year 2020.

Empresários do setor de bicicletas comemoram aumento de até 118% nas vendas durante a pandemia em São Paulo

Medidas de isolamento social contra o coronavírus impulsionaram as vendas do segmento, mas especialistas alertam que não dá para esquecer dos cuidados com a saúde na hora de pedalar, para evitar contaminação pela Covid-19.

Por Rafael Ihara, SP1 — São Paulo
07/09/2020 14h56 - Atualizado há 9 meses



Bike sector entrepreneurs celebrate up to 118% increase in sales during the pandemic in São Paulo. Social isolation measures against the coronavirus boosted the segment's sales, but experts warn that you can't forget about health care when cycling, to avoid contamination by COVID-19

3em-Estar

Com isolamento, aplicativos de exercícios crescem 226% no Brasil

Com as academias fechadas, brasileiros investem em app fitness para manter uma vida saudável

Fernanda Suassuna
18/04/2020 5:00, atualizado 17/04/2020 20:51

*With isolation, exercise apps grow 226% in Brazil
With gyms closed, Brazilians invest in fitness apps to maintain a healthy life*

New opportunities are emerging for physical education with virtual classes and synchronous classes or recorded classes, increasingly opening space for complete health platforms that include physical activities, exam calendars, results, medical appointments, mental and physical wellbeing content, and so on.

On the other hand, as movement restrictions eased, interest in physical activity indoors also dropped, as illustrated in the graph below. (Google Trends 2020 vs. 2021).



WHICH INITIATIVES CAN BRANDS ADOPT?

It is not new that brands and sports activities go hand in hand: companies as sponsors of major events are present in public spaces. We are undoubtedly in a new and prosperous moment to engage more people about introducing more physical activities in their routines. Brands can and should help to reduce the idleness of the population.

The participation of brands, financially to facilitate access, and in sharing content to raise awareness and encourage the practice of physical activity, contributes to pillar of social responsibility. This is one of the most important aspect brand responsibility, something that is increasingly important to consumers – and therefore to companies too.

A brand that values the care of its consumer's physical and mental health, whether a health care company or not, will create a true bond with consumers. People expect brands to make a difference in society, far beyond speech. This is a call to action!

WHAT BRANDS HAVE BEEN DOING?

The concession of the private initiative administration of Ciclovias and Ibirapuera Park in São Paulo brought brands such as Boticário, Ifood and Santander closer to a space that had been little explored until then. Cycle lanes in São Paulo are sponsored by companies in partnership with the city hall, such as Uber.

However, consistent brands exposure in the area of health universe must be very well planned for it to be authentic: the product or service must inspire or facilitate people's lives.





If the brand's proposal does not add value to the concept of health, is it worth being present?

Who remembers when, at a press conference, Cristiano Ronaldo pushed away a soda bottle asking instead for water? It is necessary to learn that at certain times the physical presence of a product may not be compatible with the situation.



HOW WILL IT BE GOING FORWARD?

Will the buzz of physical activity remain after the pandemic? It is still unclear whether this movement is here to stay, but that physical activity is positioned as an important tool for physical and mental health is indisputable.

POINT OF VIEW

It is worth considering the encouragement and facilitation of physical activity in brand purpose and marketing.

At the present time, with the population having suffered a mental stress during the pandemic, we must remember that physical and mental health go hand in hand.

Outdoor physical activities such as cycling have grown in popularity, and people will seek spaces such as parks and bike paths to move around in. Brands can and should participate in these transformations and be present in these public spaces in favor of an improvement in the population's quality of life.

The increase in the use of online platforms and apps for physical activity can open space for brands to promote competitions and challenges in partnership with health apps. With the exercise they perform, the user can accumulate points to exchange for products or earn discounts with partner brands. Why not?

The brand's participation in this space must be aligned with improving quality of life. Brand positioning and sponsorships are well received, but the offer of products not in dialogue with health must be rethought.

Companies must be consistent in their actions, both internally with their employees and with society. Mental health will continue to be a much-discussed topic.



POST-COVID SOCIETY: HOW WILL THE PHYSICAL ENCOUNTERS RETURN?



Ana Claudia Malamud,
Ipsos UU



Luciana Obniski,
Ipsos UU

CONTROL IN THE NAME OF SAFETY

When we entered the first lockdown abruptly and without understanding what we should do or the real threat of the unknown virus it was easier to anticipate this state of suspension coming to an end soon. However, 2021 proved that the effects of the last 18 months have no end date, and that social re-adaptation will take longer than we imagined.

In the context of disorder, those responsible for society and for our children are trying to bring some order and protection to those who are still struggling to navigate a complex and confusing world.



Looking at the Censydiam diagram, we can say that the pandemic pulled us much closer to the axes of safety and control than fun and pleasure.

When we feel that we have control, we feel protected and powerful.

But, prioritising the motivation of control, we move away from freedom, letting go and living without thinking

about the consequences. These are inherent aspects of being human – especially important for Brazilians who are known to be connected with the most “passionate” motivations.

On the horizontal axis, which maps our social interaction, there is no doubt that our group relationships have become more complex.

The fluid times of intense digitization had already impacted our behaviour and needs as social beings long before the pandemic began. Dating (or flirting) apps already established that there would be a virtual element to the “match”, making the whole experience different to if were to take place in a face-to-face environment. With the insecurity of the pandemic invading areas of our lives that, up until then, we had total control, the hybrid way in which all relations have been taking place became more relevant and more complicated.

In a scenario in which we came to realise that we weren't fully in control of the variables that already existed, are we ready to start making connections “by chance” again? And even more, how will young people relate to each other? If hormones help to push people out of the door and facilitate resocialisation, will the in-person experience continue to be so indispensable and valued after so many tasks have been permanently migrated to online?

FEAR OF DATING AGAIN

The acronym FODA (Fear of Dating Again) is another dysfunction that the pandemic has intensified.

The effect of this innocent game brings with it important memories for the formation of emotional maturity that we would need to navigate the universe of relationships that would be established from then on: desire, affection, insecurity, fun, trust...

The best friend slightly squinting blindfolded, reaffirming the friendship pact and directing the kiss or handshake, the expectation of kissing the most beautiful boy

in the building, the first kiss, the resilience of waiting until the next weekend, for new pairs to be formed at random... Even with so many variations, the game was a form of initiation into the universe of sexual desire; kissing, hugging or just shaking hands. But if we can no longer lean against each other, and prefer to relate through screens, how are we going to develop relationships in a post-pandemic world?

We already know that part of these moments have been replaced by apps that follow the new rules to attract young people: make any interaction quick and gamified. In them, many of the “matches” end long before the “handshake”, and some lead to conversations that evolve into monogamous romantic relationships, even between couples who have never met in person.

But truth be told, the universe that young people receive today is nothing like what previous generations received. If a few generations ago women married virgins and many had only one affective and sexual partner throughout their lives (following the rules imposed by this partner), these women’s daughters won the right to divorce and sexual freedom - even when she was many times more spoken than lived.

The wave that seemed to lead to a highly sexualized and free contemporary youth found young people who feel contemplated by other forms of entertainment: A survey carried out by Datafolha with more than 1,800 men in 2020 shows that 24% of young people aged 18 to 24 do not had intercourse in the last two years — more than twice as many as in other age groups. Add to that the “social physiotherapy” that we will need to undergo in the months following the vaccine to get back to feeling safe to touch other people. We have a slight idea of the obstacles that the generation of young people will have to overcome to run the risk of butterflies in the stomach again, this is irreplaceable, at the exact moment when friendship seems to take on other shapes and the universe seems to expand beyond our imagination.

COMING BACK TO PLEASURE

How to navigate and connect to this new hybrid reality, still suffering the impacts of a worldwide pandemic that has pushed us even more physically and emotionally away?

Returning to the Censydiam diagram that we quoted at the beginning of the text, once we understand the motivations of control and power, in which we are now, it is easier to position these tensions – and, from them, think of possible ways to alleviate these us who graduated in recent years. For brands that want to connect with this audience, this is where the greatest potential resides.

Any effort that “pulls” young people back to the territories of Vitality and Conviviality (the most passionate), will help to remedy part of the effects that social distancing has generated in the younger generation of adults. In the absence of physical places that could serve as a meeting point for this age group, thirsty for social interaction, Canada, for example, saw the emergence of the Club Quarentine, which receives up to a thousand people per event, even having a (virtual) queue for enter the parties, and was considered by “The Cut” as the hottest ballad in quarantine. Even Pablo Vittar DJed there, at a party in partnership with “Paper” magazine.

Beer brands, which suffered from the closure of bars – and even more from the decrease in consumption occasions – also struggled to innovate in strategies: From crowdfunding for bars, to partnerships with restaurants to offer a memorable experience, even inside from the home of consumers. There was also the Beats action, with the singer Anitta, which not only generated a live show at the carnival, but also yielded some episodes of a reality show led by the singer, which ended up attracting more than 1 million followers on Instagram alone.

POINT OF VIEW

In a world where encounters become increasingly difficult and fleeting, brands that are committed to helping build lasting bridges that allow for true interactions are more likely to earn a captive place in the hearts of these future adults.



WORK: AN EVOLVING RELATIONSHIP

Revolutions, wars or pandemics have always been considered disruptive factors that have profoundly changed the world, relationships between people, and ways of working and living.

The Covid-19 pandemic was certainly a game changer for our relationship with work and how it affects our personal life. In early 2020, companies were forced to quickly adapt to a new and unexpected work model to maintain their activities while millions of professionals also had to abruptly change their routines, reconciling remote work with domestic tasks.



Isabela Zanini,
Office Management

In the wake of the pandemic, the home office was adopted as a means of work by about 46% of companies in Brazil, according to a study carried out by the Administration Foundation (FIA).

After this initial challenge in adaptation we faced, what did we learn? Can we predict how our working relationship will be going forward, and its impact on personal life?

Remote work has always been a much-desired model by professionals in Brazil and around the world. And, having experienced it, many would like to continue in this way. The Ipsos Essentials survey found 84% of professionals preferring to continue working at home, even after the end of the pandemic.

Companies considered more conservative have always been resistant to this, but there are signs that the scenario is changing. Fears of a new era of remote and digital working (which is already happening) are beginning to

fade. The remote work imposed on many during the pandemic proved that it is possible to continue business in this way with the same efficiency as offices. Simultaneously, new management formats, productivity and hierarchies were established. Together with the advancement of technology, the digitalization of work is accelerating.

IS HYBRID WORK A TREND OR REALITY?

The work relationship has changed, and the future is already knocking at the door with new observable trends. This reality is already here in countries like the United States and the United Kingdom, whose vaccination rates are much more advanced, and the movement to reopen offices has already started. For now, the model most widely adopted by companies is hybrid work, which alternates between remote and face-to-face work.

In Brazil, the hybrid model is a solid bet for a new way of working in 2022 and beyond, becoming a permanent part of post-pandemic business. The main benefits of hybrid work include opportunities for a better balance between personal and professional life, in turn giving providing people greater satisfaction. For companies, this model helps to reduce office infrastructure costs and makes them more attractive to potential employees who consider home working a decisive factor when changing jobs.

The physical workspace and the management model we know brings new meanings to companies and professionals. The Covid-19 pandemic is encouraging companies to adapt their office structures, transforming them into collaborative and shared spaces given the focus of face-to-face work will be more directed towards meeting people, teams and customers, recognizing that human contact is still an important factor in personal and working relationships.

The workstations also adapted to the hybrid model allow for shared use between different people and areas, and can be occupied on a first-come, first-served basis or through booking systems.

New aspects of business are also being incorporated into the daily lives of companies and people. The lived experience of the pandemic allowed us to rethink our own values and beliefs, and to adapt to new times.

Productivity started to be questioned and we gained more time to perform personal tasks, with the hours that were lost in the daily commute to work, for example.

Many companies were forced to adopt new management processes and, consequently, new ways of measuring performance, with a greater focus on results instead of hours worked.

The main challenges for professionals in this new work relationship are the difficulties of time management, and their relationships with managers, who start to develop new methods to get around the distance.

Sectors such as Human Resources and Information Technology have in particular discovered new ways of adapting to ensure their human capital, investing in actions such as adapting infrastructure for employees to work at home and encouraging the use of digital training tools and platforms for online meetings, courses, and events.

The digitisation of work is a trend that will continue in the coming years in Brazil.

Although it is not possible to consider the intense working experience of the pandemic as a “normal” scenario, what is certain is that new practices are being developed and that they tend to improve over time.

Although there is no specific legislation for hybrid work in Brazil, telework is already part of the new Consolidation of Labor Laws (CLT) after the labour reform. This is considered as: “the provision of services predominantly outside the dependencies of the employer, with the use of information and communication technologies that, by their nature, do not constitute outside work.”

FLEXIBILITY AND RISKS

The trend for Brazil in 2022 is to make professional relations, laws and labour agreements more flexible. Meanwhile, there is an increase in hiring independent professionals on a contract basis as per demand or by project, shortening the long-term employee relationships with companies.

The negative side to this is the weakening of labour and impact on consumer spending it can cause. With greater instability in incomes, people are less able to invest in more expensive goods such as a homes and high-value consumer goods. It can also hamper future retirement planning and the absence of formal work contracts can mean individuals lose a series of protection from social benefits such as sickness and unemployment benefits, paid vacations, among others.

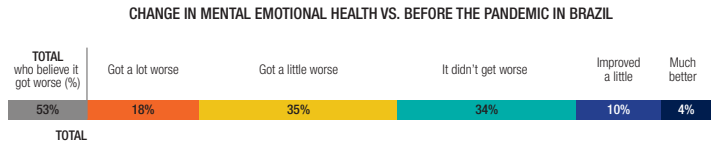
THE IMPACTS ON PERSONAL WELLBEING AND RELATIONSHIPS

Post-pandemic Brazil needs to reposition relationships between companies and people with wellbeing more central. Mental health is being an important concern in the face of current challenges.

Various challenges of the pandemic, from social isolation and physical distancing to insecurity and uncertainty and the feeling of vulnerability had serious impacts on people, shown in significant increases in the incidence of depression, burnout and anxiety. This gave rise to what people called a parallel global pandemic of mental health.

The topic of health and wellbeing is at its peak of discussion. According to the World Health Organization (WHO), Brazil has the highest prevalence of depression in Latin America and Brazilians are considered the most anxious people in the world.

An Ipsos and World Economic Forum study in 30 countries looking back on one year of Covid-19 found that 53% of Brazilians believe that their mental health has changed for the worse since the beginning of the pandemic.



Fonte: Ipsos - 2021 One Year of COVID



New strategies to support mental health have emerged, and once again, technology is a protagonist with the launch of numerous platforms for remote care with psychologists, psychotherapists, and online groups providing support during this challenging moment.

The topic has also been widely discussed in the corporate world and companies that are attentive and concerned about the health and wellbeing of professionals are establishing mental health programmes with activities such as talks on the topic, online yoga and gym classes and subsidising therapy, as assistance measures for employees.

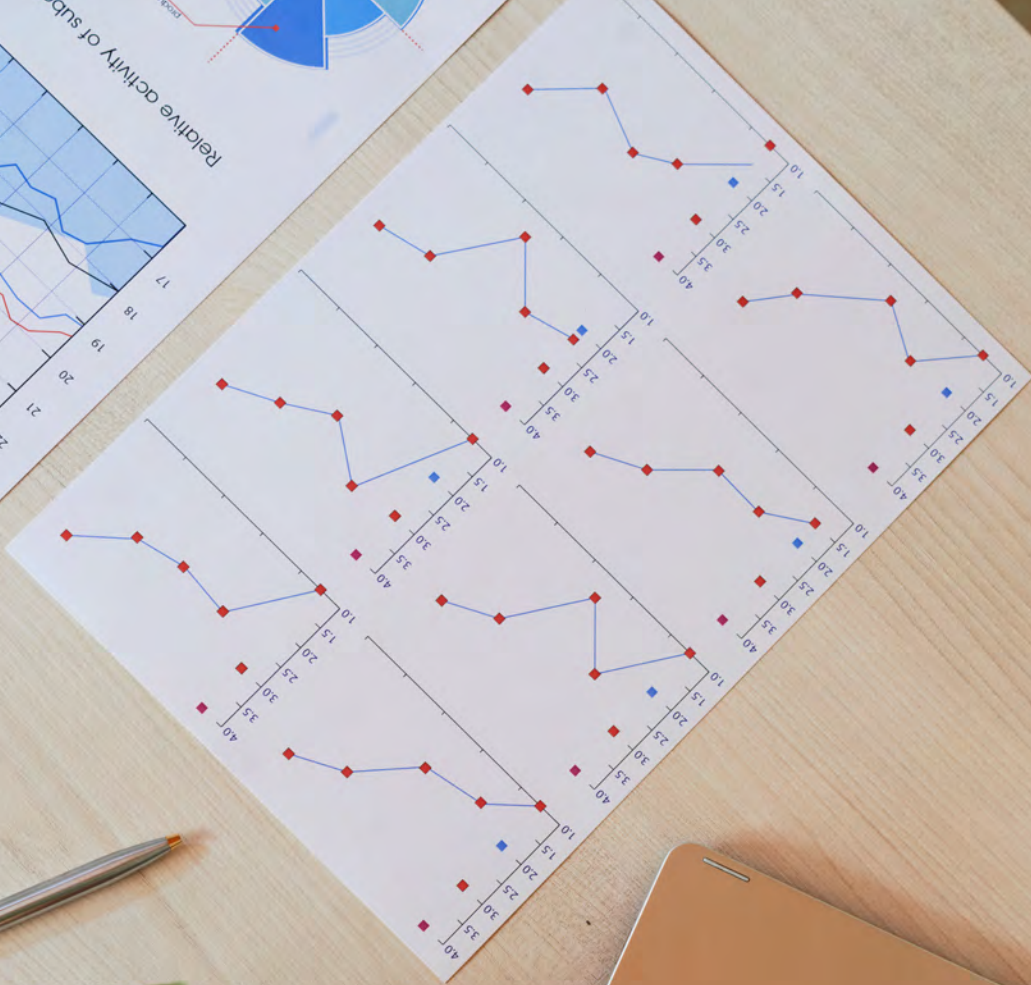
The extension of the pandemic scenario in Brazil may further contribute to the worsening of cases of anxiety or depression.

On the other hand, the new ways of working and living, which are being designed and tend to remain in 2022, demonstrate a greater concern of people with quality of life and care for physical and mental health.

According to a survey carried out by Ipsos partnership with the Global Institute for Women's Leadership, 57% of Brazilians are thinking about taking action to improve their health and wellbeing after the pandemic. Meanwhile 44% intend to spend more time with family and less time working than they did before the pandemic.

POINT OF VIEW

Changing perceptions after the pandemic and the new work models experienced open possibilities for people to find a better balance. The new habits that many acquired during the pandemic could form part of our renewed context and purpose in life.



ANALYTICS AND TIMING: PRODUCTIVITY AND SURVEILLANCE

The pandemic transformed many aspects of society, including work. With face-to-face meetings made impossible, professionals migrated to the home office and what seemed like a temporary situation has become an enduring model.

Even though many with Brazilians sought out the home office, this isn't necessarily a full-time desire. At the start of 2020, one in two (49%) favoured working from home at least once a week, according to a survey by Ipsos.



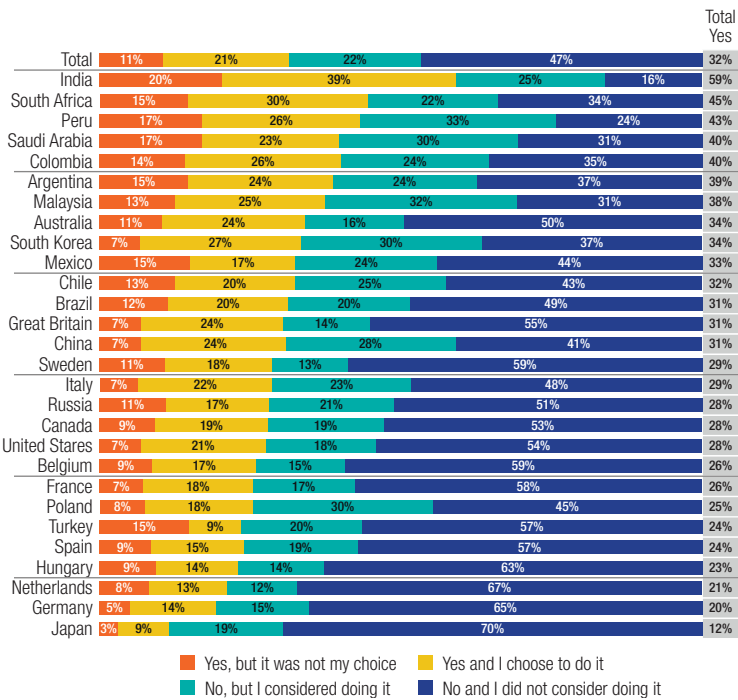
Thiago Ramos,
Global Modelling Unit

Several situations that can hinder productivity and generate problems for those working from home. One of them is overwork, which can cause strong mental wear for the worker and serious physical problems such as bodily aches, due to the less suitable ergonomic structure of the home compared to the office. During the pandemic, an Ipsos survey showed that hours worked by the population were on the increase since the beginning of social isolation.

WORKING HOURS

In Brazil, one-third (32%) say they increased the number of hours they work at some point during the pandemic. This is level with the global country average, but the proportion that agree ranges from 59% in India to just 12% in Japan.

Q. Did you experienced an increasing number of hours you work since the outbreak of the Covid-19 pandemic?



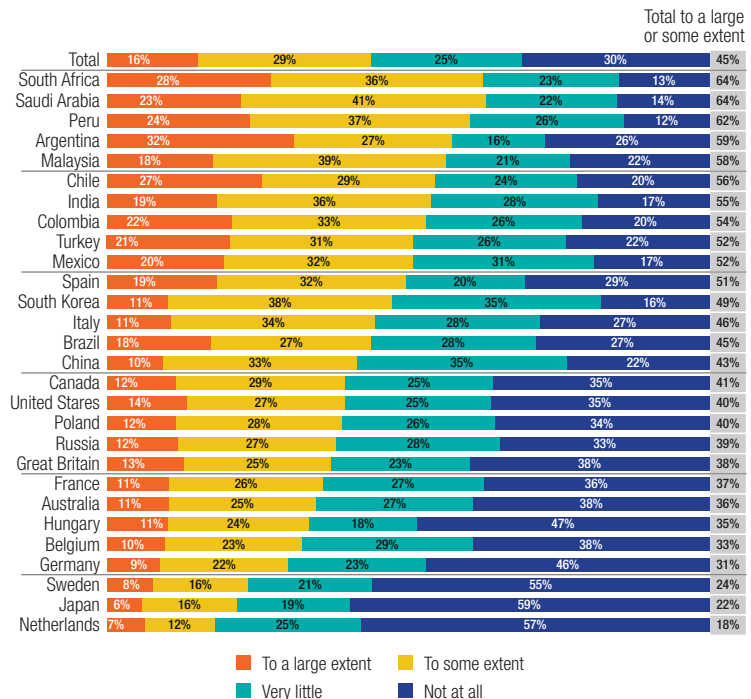
PRODUCTIVITY IN THE HOME OFFICE

Being at home means entails responsibility and demands as the employee must optimise their time in a similar way or, in some cases, to a greater extent than at the office.

This raises questions about employee time management, due in part to family pressure.

In Brazil, 45% reported experiencing stress due to family pressures such as childcare as a result of the Covid-19 pandemic.

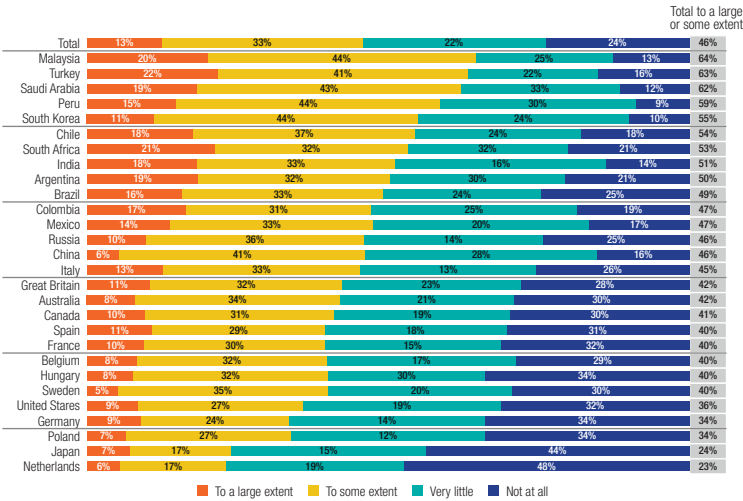
Q. How much have you experienced stress due to family pressures (e.g. childcare) as a result of the covid-19 pandemic?



ASSESSING PRODUCTIVITY

In Brazil, 49% say they experienced reduced productivity as a result of the Covid-19 pandemic. This is slightly above the global country average of 44% and ranges from 64% in Malaysia to just 23% in the Netherlands.

Q. How much have you experienced reduced productivity as a result of the covid-19 pandemic?



Tools to measure productivity could offer a useful way to meet help to improve time management and productivity of employees. Such applications show the activities of team members in real time and in context of previous time periods.

These metrics are important for manager to have an accurate view of their workforce.

In other words, a tool to measure productivity that is not tabulated by the user offers an impartial view and transparent view to understand what needs to

be adjusted. It's a chance to understand which employees are affecting the indicators. This is the basic principle of the competition model.

This can also offer a way to know who needs training. As for employees themselves, there is a possibility of self-knowledge by understanding where they are wasting time and how this can be improved.

SURVEILLANCE OR TOOLS TO MEASURE PRODUCTIVITY

Several tools are being developed to measure the productivity of employees within financial institutions and application developers.

Yandex, the country's largest internet company has installed facial recognition technology in its transport application unit to prevent unfit drivers from accepting new orders. They monitor 68 facial points on the driver's face. Nice Acimize, on the other hand, provides a kind of digital Big Brother, offering financial crime, risk and compliance software that uses machine learning to help employers detect unusual employee behavior.

Microsoft also created software to measure employee productivity called Productivity Score, identifying everything an employee does during their day. With the equipment, bosses know how many professional e-mails were sent, who turns off the camera in meetings, and even how long the person spends in front of the computer. To make the system more rigorous, employees would receive a score based on the information collected by the software.

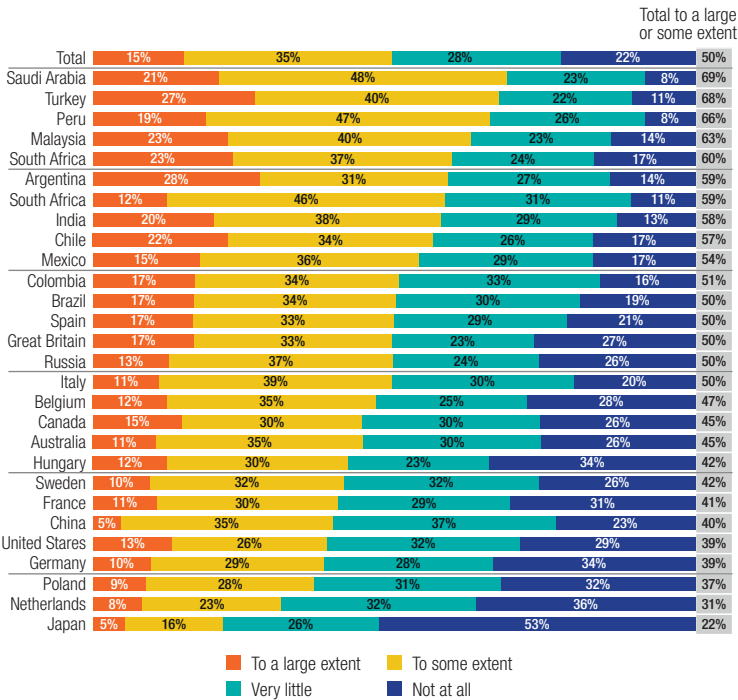
In addition, Trello, Jira, Clubhouse and other tools help both employees and managers to better deal with the organisational processes so that they can have a good balance in both professional and personal realms, aiming to reduce anxiety and stress rates. Finding the best balance between work and personal life is indeed difficult to do.

Vale ressaltar que existe certa dificuldade em encontrar o melhor balanço entre o trabalho e a vida pessoal conforme apresentado no último gráfico.

WORK-LIFE BALANCE

In Brazil, 51% say they had trouble finding a work-life balance due to the Covid-19 pandemic. This is about level with the global country average and ranges from 69% in Saudi Arabia to just 21% in the Netherlands.

Q. How much have you experienced difficulty finding a work-life as a result of the Covid-19 pandemic?



POINT OF VIEW

This underlines how finding the right balance between time dedicated to work and efficiency is a necessity.

Excessive pressure and work can end up compromising the employee's performance. All companies therefore need to know how to keep their best assets strong and healthy to be able to leverage their best characteristics.



CULTURE: THE POST-PANDEMIC BOOKSTORE, THEATRE AND CINEMA



Cassia Franco,
Innovation

THE PANDEMIC HAS LEFT US HUNGRY IN MANY WAYS

“WE DO NOT WANT JUST FOOD.
WE WANT FOOD, FUN, AND ART
WE DO NOT WANT JUST FOOD.
WE WANT OUTPUT
ANYWHERE...”

The song by the Brazilian band Titãs “Comida”, released in 1987, can speak for our current context.

As we find ourselves deprived of the free will to come and go as we please in spaces of entertainment, culture and art. The pandemic deprived us not only of living together, but also of sharing experiences in movie theatres, on stage and in museums. We are hungry for these things.

According to Paulo Amarante, psychiatrist and founder of Fiocruz's Laboratory for Studies and Research in Mental Health and Psychosocial Care, "We seek to live with conflicts, to support them, and art plays this role because it helps us to elaborate meanings. Art produces new ways of seeing and thinking about life, it is a transformation of reality. And, in that sense, it is fundamental for everyone."

How do we live in a reality deprived of art, culture, and entertainment – things that are so inherent in our socialisation. During the pandemic, we reinvented ourselves and technology was our great ally. Psychologist Chris Ferguson, in an interview with Business Insider, says that "People are turning to screens and technology to satisfy their social needs that, for now, cannot be satisfied in the real world."

We find ourselves hungry for the things that were abruptly cut off and we have been looking for other means to somehow reconnect with the nourishment of the universe of art, culture and entertainment.

Technology has opened a door of possibilities for us so many closed doors; of cinemas, bookstores, concert halls and theaters. Countless live events on social networks showed performances by those who used their balconies as a stage and neighbours as an audience. Various classes events and virtual visits to museums were also enabled through technology.

Adaptations of events in physical locations saw people respecting distances in outdoor museums and drive-in movie theaters, or rock concerts performed and watched inside inflatable balls to make entertainment possible in the midst of the pandemic.

Works of art also crossed the physical barrier of museums. As an example, Mostra Museu launched a hybrid online/offline project in 2020 which aimed to give light to artistic productions carried out during the period of social isolation and to reflect on thoughts and feelings at this time.

An exhibition of photographs and paintings in public spaces used QR codes to link the viewer to more information about the artist. Another highlight was

the exhibition of TWINS: Secrets of the Pinacoteca, which gave the option of reserving a time to visit face-to-face, but also allowed anyone to access and experience it via a 360° virtual tour.

Even though people in Brazil and around the world have reinvented themselves, the negative impact on the entertainment sector was high. According to a PwC study, 2020 registered the biggest drop in global revenues in this sector, falling 5.6% compared to 2019. This represents more than US\$ 120 billion. However, 2021 projections show optimism with a forecast of 6.4% growth for the year. This shows us that new habits and ways to keep entertainment, art and culture on the consumer's menu have worked well.

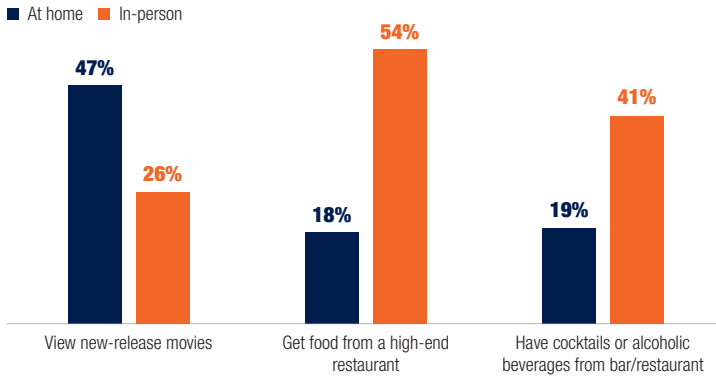
ARE WE ON A PATH OF NO RETURN?

Cinemas

With the closing of cinemas, streaming is one of the great entertainment highlights today. Brazil is already a strong consumer of digital content. According to data shared by Forbes, the country ranks second in the ranking of Netflix subscribers worldwide. There are also new players in this sector that have entered between 2020 and 2021: Disney+, HBO Max, Peacock, Pluto, Discovery+ and Paramount+ who joined the already present Netflix, Amazon Prime, Globoplay and AppleTV.

The return to cinema does not seem imminent. According to Ipsos, 47% of people prefer to watch movie releases in the comfort of their own home, rather than in a shared space, even if safe from Covid-19. The opposite is true of dining out at a restaurant or bar.

Q. Given the choice, assuming both were equally safe or possible, would you rather do the following in person or at home?



Source: Ipsos Coronavirus Consumer Tracker, April 2021 (USA)

A recent release of Disney's "Cruella" movie exemplifies the industry adaptation. The film was released in theaters, but also at a pre-release price on the Disney+ platform. After a few weeks, the film was available to subscribers.

Theatres

The theatre has also adapted to find new ways to bring plays to the eyes and ears of the audience. Since the start of the pandemic, several shows have been made available on online platforms, and even live presentations on Zoom or YouTube. However, while major film production companies have created protocols to continue their recordings during the pandemic, the future of the theatre does not seem to follow the same path. This kind of art cannot forego the human connection due to its very essence of exchange between actor and audience in the present moment.

Bookstores

Unlike the theatre, bookstores were forced to change their business model due to the pandemic context. According to Bruno Zolotar, Director of *Marketing and Sales* at Editora Rocco, in an interview with the website Consumidor Moderno, the trend of non-physical sales is here to stay. “The increase in the share of electronic retailing in book sales has advanced a lot in this pandemic, and physical store will not return to their previous levels. In this new context, physical bookstores will have to increasingly privilege the experience of readers, and have means of sale via websites, social networks or home delivery”.

Video games

Online games also gained great prominence. According to Comscore, in 2020, 70% of the online population in Brazil makes up the gamer universe (across mobile, desktop and other platforms). All this industry success is reflected in new communication strategies.

Fortnite, for example, already has plans to be a mandatory stop on artists’ tours, and even host online events. Games are already staging the future: Jojo Todynho in partnership with “Call of Duty” promoted a new themed package for the game. DJ Alok became a videogame character in the “Free Fire”. Not only in entertainment, games can also show themselves as relevant platforms for sharing content, launching new products, or even bringing up relevant issues for social causes.

**DIGITISATION, SOCIAL DISTANCE,
CONSUMER ADAPTATION... WHERE ARE WE GOING?**

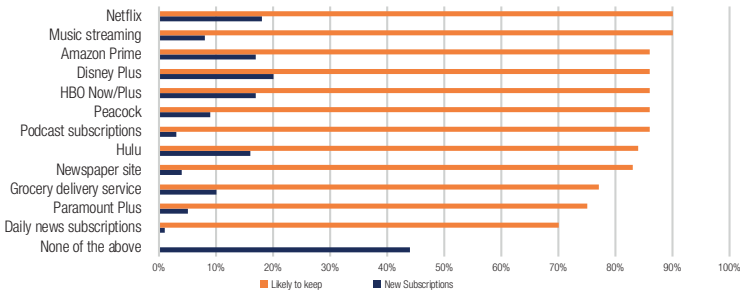
Despite all the adaptations and advances in combating Coronavirus, the world is still concerned about the pandemic.

According to Ipsos's What Worries the World study in 28 countries, Covid-19 is still the biggest global concern. Although the figures have dropped during 2020, more than one-third still say the pandemic is one of the biggest issues facing their country. In Brazil, however, the trend is heading in the opposite direction as more of the population begin to express concern about the pandemic. In June 2020, this was at 59%, putting the country 4th in the world ranking. This shows there is still a long way for Brazil to go in the hope of returning to "normal".

The internet has proven to be a great ally not only for socialisation at a time of social distancing, but also in the way we consume content from different sources. Entertainment, culture and art are accompanying this consumer adaptation.

Subscription services are the big bet for consumption; for movies, series, podcasts, newspapers and even product deliveries. Consumers have learned and adapted to buying online, and it seems that there is no going back.

Q. Which of the following subscription services did you sign up for the first time in 2020? How likely are you to keep subscribing to this service once podemic restrictions are fully lifted?

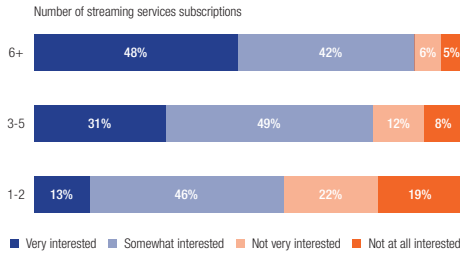


Source: Ipsos survey USA, April 2021

At a time of high fragmentation of the consumer portfolio when subscribing to various services, the opportunity for combination subscriptions is a valuable path for companies. We find 90% of consumers who subscribe to more than six

services are interested in combo packages.

Q. Who interested would you be in a service that bundles multiple streaming services?



Source: Ipsos survey USA, April 2021

The digital has empowered purchase decision processes, competing with physical experiences, and the future indicates these two worlds will be increasingly united and complementary. What we see today is a process of de-materialisation of consumption.

Physical experiences will still be valued, but the consumer journey will demand digital touchpoints. The physical experience of going to a bookstore meets the freedom to buy the book with one click and receive it at home in a few hours. We can also think about 100% online movie reservations without a box office, offering a quick service and loyalty points. Or theaters with exclusive seats, reduced capacity, and, at the same time, availability of virtual seats so that people can watch from home.

Entertainment will be increasingly hybrid, making room for a much greater audience reach. It will not only be important to count the number of people physically present at shows but to also measure the digital audience and evaluate engagement, views and comments during an online event.

But will this online access space be forever free?

According to Gui Marconi from the events company “Diverti” (which organizes events for major sponsoring brands such as Brahma), discussions about whether or not to charge access to online shows are still ongoing. This would increase direct revenue, but decrease reach and alienate sponsors. While the producers do the calculations, a survey carried out by Gui Marconi’s company revealed that 56% of participants would be willing to pay to attend an event online.

A recent example of a “phygital” entertainment action that went viral on the internet was the McDonald’s themed party in the latest edition of the BBB, by Globo TV channel. The brand set up the participants’ costumes and during the live broadcast of the party, the viewer could order a McDonald’s combo through Rappi’s delivery, which ca matched the BBB’s “brothers” – everything live and within a hand of a click.

A RACE AGAINST TIME IN ECOMMERCE

The pursuit of the shortest home delivery time for consumer goods is also a race against time in eCommerce. The concept of same-day delivery is increasingly popular with online consumers. Companies such as Americanas, Mercado Livre, and Amazon are examples of how brands are seeking more and more dynamism, announcing delivery of products within just one hour.

And social networks cannot be left out either. Tik Tok is the highlight, building more relevance among users of different age groups and raising interest among brands. The communication potential of networks is being increasingly explored by brands. Even knowledge of books is disseminated there: #BookTok helps to disseminate videos from readers in which they tell the book review by “pretending” to impersonate the character and at the end present the book to the public. Imagine if a bookstore brand took advantage of this communication opportunity.

POINT OF VIEW

Companies need to be increasingly aware of how to build a physical experience for their consumers when thinking about entertainment, culture and art. But digital needs to be on that path. The upcoming 5G technology will also help accelerate this process even further.

Meanwhile, eCommerce will be an increasingly prominent part of consumers' purchasing decisions, being able to permeate through different phases of the consumer's purchase journey.

And, the consumer will not only want fun and art, but also physical and digital in a hybrid entertainment process. Customer experience is key. Is your company ready?



SUSTAINABILITY: HOW TO APPROACH A PRIORITY ISSUE IN A PUBLIC POLICY VACUUM

"LATELY, WE'VE BEEN LISTENING,
READING AND DEBATING
SUSTAINABILITY, CLIMATE CHANGE
AND ESG PRACTICES SO MUCH THAT
WE'VE FORGOTTEN THAT, BEFORE
BECOMING A UBIQUITOUS TOPIC, THE
CONCEPT OF SUSTAINABILITY AS A
CULTURAL VALUE HAS UNDERGONE
SOME TRANSFORMATIONS."

The main premise of sustainability is the ability of human beings to enjoy the planet's natural resources without compromising their use for future generations. The concept of "sustainable development" gained momentum with the publication of the Brundtland Report in 1987. However, long before this, other fields of investigation such as ecology and economics were already debating notions around the subject.

There has been a more constant and linear evolution of the theme of sustainability in terms of consumption, with the year 2007 as a possible benchmark. Before then, there was not such a developed understanding among the public as there is today.

Only in 2015 did sustainability begin to be understood as something relevant to the citizen/consumer. In 2019, the concept was established as a cultural value and became vital for understanding consumer motivations. In other words, consumers began to internalise a sense of responsibility, which is also transferred to companies, brands, and multiple institutions, public and private.



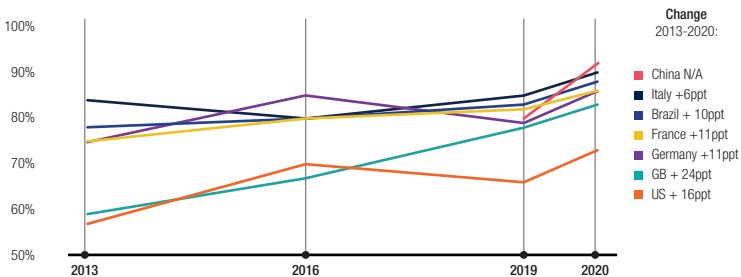
Priscilla Branco,
Public Affairs



Thiago Ramos,
Global Modelling Unit

SUSTAINABILITY IN NUMBERS

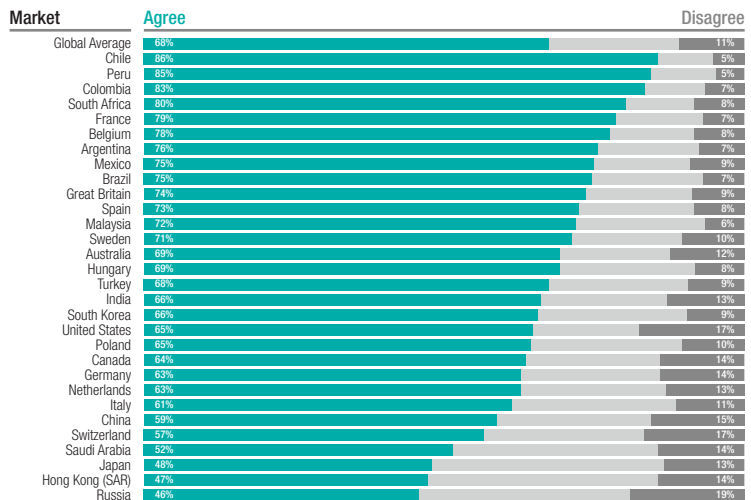
The 2021 Ipsos Global Trends study conducted in 35 countries identified Climate Emergency as the strongest unifying value in societies around the world. In Brazil, agreement with the statement “We are heading towards an environmental disaster unless we change our habits quickly”, grew 10 percentage points from 2019 to 2020.



The 2021 Ipsos Earth Day survey showed that only about one in four Brazilians (26%) agree that “the Brazilian government has a clear plan on how the government, businesses and citizens can work together to tackle change climate”.

Agreement with this statement in Brazil is below the global average (31%) and is one of the lowest among the 30 countries surveyed. This same survey reveals that almost seven in 10 Brazilians agree that “if the Brazilian government does not act to combat climate change, it will be failing its citizens”, a result slightly above the global average.

This perception of responsibility affects companies and brands on an even greater scale as 75% of Brazilians agree that “if companies do not act to combat climate change, they will be failing its people”. Brazil shows greater agreement with this than that of countries including the United Kingdom, Spain, Australia, and the United States.



Base: 21.011 online adults, aged 16-74, in 30 countries.
 Surveyed between 19 February - 5 March 2021.

In addition to the centrality of the environmental agenda in a macro context, which points to the responsibility of governments and companies, other data reveals how sustainability has gained acceptance in the sphere of consumption.

The Global Trends 2021 study report indicates continued growth in agreement with the phrase “I will sacrifice convenience if it means getting healthier products”, which in 2020 reached 78% of Brazilians (in 2016, agreement was at 69%).

THE “SAY-DO” GAP OF COMPANIES AND CONSUMERS

The debate about sustainability has brought to light a discussion about how perceptions of importance actually materialised as more environmentally friendly habits by consumers. This possible divergence is referred to as the “say-do gap”.

There are several theories that attempt to explain this gap, with equally varied conclusions about what leads consumers to take actions that are not exactly aligned with their concerns. The theory of evolutionary psychology, for example, suggests that the risk of climate emergency is not assimilated by individuals as a risk in the short term, which ends up generating little adherence to sustainable attitudes in the present moment. For some, the gap simply represents the fact that consumers don't truly care about the environment as much as they say.

These perspectives end up neglecting the most positive aspects of human behavior: the capacity for self-reflection, for managing complex tasks, and the capacity of people to be motivated by social influences and events. It is precisely in this way that the role of brands assumes a central position and importance, for two distinct reasons.

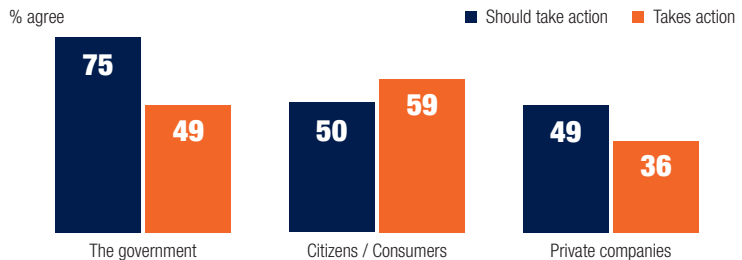
First, brands must go beyond positioning themselves and making their products and production chains more sustainable. They must also play a role in helping consumers to achieve more sustainable attitudes. The say-do gap between consumers is complex and composed of multiple factors ranging from lack of access to structures, such as recycling, to lack of a precise understanding about what can, in fact, most effectively mitigate environmental problems.

For example: is it better to recycle or consume less plastic? Reduce meat consumption or buy only organic products? Reduce car use or take shorter showers? There is no clear and accessible manual for consumers to follow for their daily actions, and much less adapt them to their different life situations.

We cannot forget about the difficulty, or even impossibility in some cases, of access for a large part of the Brazilian to more sustainable products and basic services that enable more sustainable choices, such as recycling.

Another point concerns the perception of the degree of responsibility with regards to sustainability. Some Ipsos studies show that people often think they are doing more than they should compared to industry and government. Despite holding themselves responsible for climate change, consumers do not consider themselves more responsible than businesses or the government.

An imbalance in effort and action on climate change



Source: EDF & Ipsos. Base: 1,000 online respondents aged 16-74 in the UK, September 2020.

In the early years of the debate on sustainability and climate change, the role of companies was not the focus of most discussions and left governments to draw up plans and public policies that addressed a sustainable society. Today, they are seen not only as agents of social change, but as a central part of the change actually taking place.

Currently, there is a consensus that companies are a fundamental part of achieving sustainable development as they are key element to a country's economic progress. As the topic advances, we know much more about the importance of implementing sustainable supply chains, reverse logistics and production processes that are less harmful to the environment.

A kind of say-do gap also concerns companies. In a provocative article, Ken Pucker, the former COO of Timberland at Harvard Business Review draws attention to the profusion of corporate sustainability reports that do not target positive impact – in other words, “greenwashing”.

Pucker argues that going forward, companies should focus on changing the system: “A sustainable system will require a paradigm shift: from wealth creation to welfare creation and a shift in GDP focus toward something similar to the OECD Better Life Index. Commitments to concepts such as regenerative agriculture, reuse and collective value represent the first steps in the right direction.”

This means companies will be accountable for demonstrating real positive impacts on society, instead of reports that meet goals and KPIs set by themselves and that are often difficult to measure, even with other companies from the same economic sectors.

POINT OF VIEW

More and more companies are getting involved in transformative actions in sustainability.

For example, Adidas and Parley reuse plastic that pollutes the oceans, transforming the material collected in remote beaches and coastal communities into a complete line of sporting goods.

Natura has projects with traditional communities and develops partnerships with rural producers for the conscious exploration and controlled management of raw materials, such as Brazil nuts, anise and other seeds, in addition to focusing on quality of life and progress of these populations.

Mondelez works closely with producers to ensure an increasingly sustainable cocoa supply chain, establishing partnerships with environmental institutions to recover degraded forest areas.

These good practices aim at a commitment to not only internal goals, but to the entire ecosystem of stakeholders.

It appears that changing the system will be the new demand and the thermometer of corporate social responsibility.



MOBILITY: IS IT TIME FOR THE ELECTRIC VEHICLE?



Fernanda Pinheiro,
Quality Measurement



Ísis Demarchi,
Innovation



Jorge Utiana,
Quality Measurement

THE RELEVANCE OF THE SUSTAINABILITY AGENDA

Between campaigns in favour of vegetarianism or veganism, social debates around climate change and protests against testing beauty products on animals through #SaveRalph, mobility also entered the wave of sustainability debates in 2021.

The global Ipsos opinion poll for Earth Day 2021³⁹ reflects that 65% of respondents agree that if governments, businesses, and individuals do not act now to combat climate change, they will be failing future generations. It also concluded that the Covid-19 pandemic has influenced people to change their attitudes and make more sustainable choices. Among these individual choices, car use stands out: the second biggest change in behaviour the global population are willing to take is to substitute cars for walking or cycling. Peru, Colombia, Mexico, Argentina and Chile are the countries that most support this, leaving Brazil is in 8th place, above the global average.

The climatic consequences of pollution are clearer for governments and businesses. In 2018, Greenpeace published a report that concluded if cars powered by fossil fuels do not stop being manufactured in 10 years, the average temperature of the planet will increase by 1.5°C. In Europe, transport is the sector that most contributed to the emission of greenhouse gases in recent years, and similarities can be drawn with Brazilian metropolitan regions. The way towards pollution-free mobility around the world today leads us directly to the electric vehicle.

ARE ELECTRIC VEHICLES A VIABLE OPTION IN BRAZIL?

Electrification of the automotive industry has been gaining ground in the planning and development of new car models over the last century. Countries and automotive manufacturers have announced goals for ending the production of vehicles with combustion engines within 10 years, on average.

Contrary to what many may believe, an electric vehicle is not a current technological innovation, but something that was born at the end of the 19th century and originally competed with the combustion vehicles of the time. After the creation of series production of vehicles (starting with the classic Ford T) and the emergence of improvements in combustion vehicles, which became highly competitive, the electric model saw its decline, passing over as a mere marginal supporter of the automotive market.

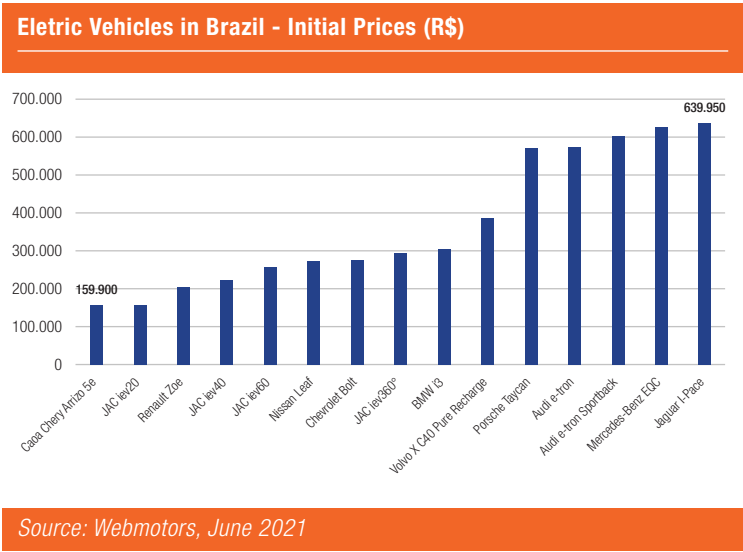
However, the use of combustion engines has been questioned and the electric vehicle has returned to the discussion in governmental and automotive circles throughout history. Sometimes as a result of events such as the oil crisis in 1973 and the Paris Agreement in 2015, which fostered the emerging global concern about our dependence on a matrix of non-renewable energy including fuel for road traffic, one of the great emitters of carbon in the atmosphere.

Given the globalised world we live in, and the fact that 100% of the automotive industry in Brazil is formed by multinationals, it is natural that the consequences of the measures already announced by the headquarters of these companies are felt in the country. One such effect was Volvo's decision to sell only electric vehicles in Brazil as early as 2021 and to have its 2030 range made up entirely of fully electric vehicles, even with the country's current underdeveloped infrastructure for these vehicles .

This is a path that all countries will inevitably have to follow in the next few years when it comes to mobility. And this is progressing at a fast pace, especially on the European continent. But is Brazil prepared to take this leap in the short term?

There have been a series of innovations in electric vehicle technology since the first models, which also makes production costs significantly high compared to the old combustion models. This is a obstacle in the Brazilian market, with prices starting at \$159,900 Reals for the models currently on sale. This is way out of reach for a large portion of consumers.

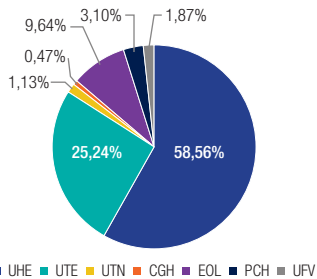
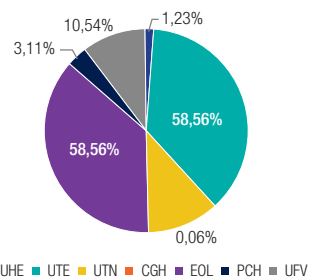
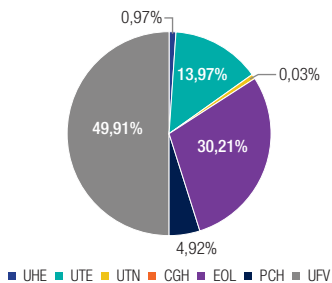
Of course, there is a market expectation that values will decrease with large-scale production, but it is not possible to see when this will happen and will bring benefits to Brazilian consumers. Especially as models are imported and, therefore, their prices are subject to exchange rate variations and tax policies.



Another important consideration brings us on to the Brazilian electrical matrix and the capacity of the energy distribution network to absorb this new demand – primarily in terms of recharging batteries..

According to data from ANEEL for 2020, hydroelectric plants represent 58% of the total capacity for electricity generation. We have for some years been living with a a water crisis which means energy generation has to be moved to thermoelectric plants to ensure supply at a higher cost, generating tariff flags that restrict the amount we pay in our monthly bills.

Also according to ANEEL, there are projects underway and others not yet started which, for the most part, are based on sources that can offset the weight that hydroelectric plants currently have. But there is no exact forecast of when and how much they may contribute to the distribution network.

In operation**Under construction****Build not started**

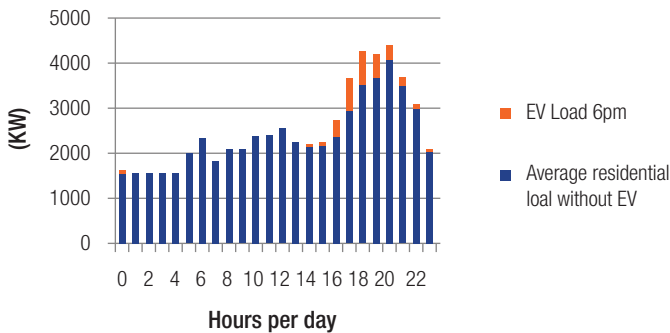
UHE: Hydroelectric Power Plant
UTE: Thermoelectric Power Plant
UTN: Thermonuclear Plant
CGH: Hydroelectric Power Plant with Reduced Capacity
EOL: Wind Power Plant
SHP: Small Hydro Power Plant
UFV: Solar Photovoltaic Power Plant.

Source: ANEEL, June 2021.

In a 2019 article by the Electric Sector Study Group (GESEL), at the Federal University of Rio de Janeiro (UFRJ)⁴², a study describes a simulation performed to measure the impact of vehicle penetration in the energy distribution system, based on an average of battery recharge times (12am, 6am and 6pm). It modelled the distribution of data on the typical residential consumption curve.

The observed result was a significant increase in the maximum demand of the system at 6pm, causing greater wear of the equipment in the electrical network, reducing its useful life, and possibly contributing to energy deficits during these hours. In this way, consistent public policies – regulatory and economic – would be necessary to ensure a safe, efficient, and sustainable operation of the energy distribution system in this scenario.

Typical Residential Load Curve with high insertion rate of electric vehicles with average distribution at 6pm



Source: GESEL, UFRJ, 2019.

In this context of electrification of the automotive sector, other modes must also be considered. In addition to individual and private transport, public and freight transport, especially in urban ecosystems, are also significant parts for the construction of a sustainable model of mobility.

Although Brazil has had, since 1986, the Vehicle Emission Control Program (Proconve), which stipulates emission targets for the automotive industry, the adoption of electrification in the construction of these models can open a new paradigm for the sector and contribute to the country fulfilling the goals of the Paris Agreement.

It is also important to point out that a large-scale change in the energy mode requires shaking the structure of an entire production system and its consumption chain. This generates a series of resistance and lobbies against this change. It is therefore essential to follow a program with guidelines to encourage a transition (or coexistence) process that will minimise the impacts on society as a whole.

There are other sustainability routes considered more viable in the short and

medium terms, until the country is able to support the mass use of the all-electric vehicle.

SHORT-TERM STRATEGIES FOR SUSTAINABLE MOBILITY

The Brazilian position within the sustainable mobility agenda requires a strategy developed based on the country's economic and social reality. In 2020, cars in circulation reached an average age of 10 years and 2 months, the worst result since 1995.

Older cars are more polluting and no longer meet the current goals of the Air Pollution Control Program for Motor Vehicles (Proconve) stipulated in 2012. They are also more unsafe for passengers as airbags and ABS brakes were not required until 2014, and they are more dangerous for other drivers and pedestrians, as they are more likely to break down on the roads and cause accidents.

When we look at the cargo and people transport sector, the scenario is even worse: buses in circulation have an average age of 10 years and 9 months, while for trucks it is even older, at 11 years and 10 months⁴³.

A fleet renewal policy that grants benefit only to buyers of electric vehicles benefits the richest in the country, who can buy these expensive vehicles.

A study by the Boston Consulting Group⁴⁴ predicts that electric vehicles will account for half the total global light vehicle sales in 2026, a transition that will occur much faster in China, the European Union, and the US than in other large markets such as Brazil and India. According to the study, the lack of legal, financial and infrastructure incentives and the higher price in Brazil (by three times) will make the transition to electric vehicles difficult: between 2% and 10% will be electric or hybrid in the forecast for 2030.

However, in order to reach the climate goals established in the Paris Agreement, Brazil also has an opportunity to use biofuels. Flex vehicles

already make up 71% of the Brazilian fleet and, if the use of ethanol is encouraged mainly due to their more attractive prices, their emissions would be equal to that of the electric vehicles.

Therefore, the main objective would be the use of flex-fuel vehicles as replacements for gasoline-only vehicles and those that do not meet Proconve's emission targets: the oldest cars in the fleet, over 10 years old.

Ironically, these same old vehicles are encouraged to continue on the streets by exemption from IPVA according to year of manufacture: most Brazilian states exempt vehicles from 15 or 20 years old, making them more attractive to people with lower incomes.

Owning a car is a necessity in most Brazilian cities as all metropolitan regions have an average commute time of more than 30 minutes from home to work and less than 20% of the population of large metropolises lives near medium and high season capacity bus, train, and subway corridors⁴⁵. Knowing that the average Brazilian income in the first quarter of 2021 is \$2,544 reals, according to the National Household Sample Survey (PNAD)⁴⁶, it is not possible to expect fleet renewal and transition to electrification to occur naturally in a high-cost setting.

Solutions will need to be developed by the municipal governments of large cities, such as increasing subway and train lines, bus corridors, bicycle paths and urban planning that brings housing and employment closer together. Companies can also act, with remote working for employees a few days a week, chartered vehicles, and changes to working hours to avoid traffic jams. Something that can be developed centrally at the national level is fleet renewal policies.

In terms of action, effective vehicle inspection policy, with periodic and punctual inspections on the highways, such as those carried out in the European Union⁴⁷, identifies polluting and unsafe vehicles, combined with incentives for fleet renewal that replace older vehicles in circulation with newer ones, will contribute to reducing automotive pollution in cities in a more effective way than the gradual (slow, in the Brazilian case) adoption of electric vehicles. In Brazil, fleet renewal is pertinent in terms of cargo transport, as

approximately 3% of the truck fleet is over 30 years old and is responsible for 25% of traffic accidents. Trucks and buses are responsible for 50% of the air pollution in the city of São Paulo despite representing only 5% of the circulating fleet, and autonomous truck drivers face difficulties when renewing their vehicles⁴⁸.

A truck fleet renewal programme already exists in the state of São Paulo through Desenvolvimento SP, but it is only intended for the purchase of new trucks upon delivery of the old one. In 2020, the Ministry of Economy started the elaboration of Frota Verde⁴⁹ [11], a pilot program in partnership with the State of Santa Catarina which grants credit to the fleet owner to buy a truck with up to 10 years of use and scraps the oldest ones. However, nothing new has come of this since the third quarter of 2020.

Including passenger vehicles, buses, and motorcycles in a plan like the Green Fleet will benefit the health of the population, as people are often hospitalised due to the pollution and traffic accidents. This would reduce costs for the SUS and damage to the environment.

The replacement of bus with electric vehicles and the expansion of subway lines also contribute positively to the environment. Fleet renewal can be put into practice in partnership with companies and in conjunction with existing incentives for the purchase of electric vehicles and the installation of charging stations for these, without one overshadowing the other.

TIME FOR BRAZIL TO DEVELOP ITS NATIONAL STRATEGIC INDUSTRY

Government initiatives and incentives for electric mobility are gaining ground in Brazil, although still at an early stage. State participation occurs through fiscal policies, support for Research and Development, support for important sectors (manufacturers, electricians and auto parts developers), industrial support, and regulation of all these systems.

An initiative that envisions a long-term national plan for innovation in the automotive sector implemented in 2018: the Route 2030 – Mobility and Logistics, . This aims to “direct and guide the Brazilian automotive sector... in relation to increasing energy efficiency, structural performance and fostering related research and development activities” (p. 55)⁵⁰.

Within this initiative, a working group on electric and hybrid vehicles was created, which aimed to mobilise studies that specifically contribute to the advancement of electromobility in Brazil, with the participation of government and industry actors and Institutes of Science and Technology.

Another initiative for the development of Efficient electric mobility solutions is promoted by ANEEL. This strategy, announced in 2019, indicates a mobilisation of the electricity sector towards the implementation of electromobility. The objective is to encourage electric energy generators, transmitters, and distributors to present solutions for electric mobility through business models, equipment, technologies, services, systems, or infrastructure. These two policies have great weight as drivers of electromobility, as they make room for essential actors to participate, and for the development and financing of the sector.

However, in the global scenario of the development of the electric vehicle sector, Brazil has several disadvantages as evidenced in its role in the production process in the automobile sector. From the 2000s onwards, Brazil is part of the worldwide structure of the sector as a large consumer centre, becoming a regional production and distribution platform for South American countries and attracting investments from automakers.

In this opening, in addition to not having a national assembler, the state acted by granting import benefits, facilitating the modernisation of the sector, controlled by multinationals, without these needing to encourage the nationalised sector of the industry, which is in large part that of auto parts. Brazil's public policies did not point towards integration of global markets with a plan for the national industry.

Currently, Brazil can feel the consequences of the loss of protection in the auto parts sector, where assemblers are starting to look at the production chain and delegate to suppliers the production parts that are more subject to competition, requiring long-term relationships.

The increase in competition, reduction in the number of companies, and restructuring of the production process leads to a reduction in the profitability of the sector as a whole⁵¹, also leaving it highly susceptible to the good performance of final sales of the automakers. Additionally, technology companies such as Waymo (owned by Google) and Tesla are important drivers of change in the automotive sector, and these do not operate in Brazil.

The Rota 2030 project focuses on encouraging R&D projects throughout the entire chain of the automotive sector. That is, it is not limited to automakers but extends to the auto parts sectors and strategic systems to produce vehicles. However, without monitoring a plan to encourage national companies, especially in the development and production of electronics, we run the risk of suffering the same consequences, reducing Brazil's competitiveness in the foreign market and maintaining our dependence. Automakers "will continue to seek to sell their new products to the large national/regional consumer market and advance in the accumulation of engineering skills, but they will not necessarily be interested in locally developing the most strategic technologies. This aspect will remain restricted to foreign headquarters, since Brazil does not have large automakers with national capital" (p.165)⁵².

There is also a dependency problem when considering intellectual property, as companies allocate efforts and resources to innovation under the guarantee of exclusive use from patenting. According to Edgar Barassa, there were over 2000 patent registrations related to electromobility in Brazil between 1998 and 2018. Of these patents, most are from foreign companies (United States, Japan and Europe), while only 10% are from Brazilian companies.

While we have what it takes to develop the technology required, it is necessary to consider whether these will, in fact, be applied and developed nationally, or if they will be restricted to foreign headquarters.

POINT OF VIEW

Analysing the current scenario of the Brazilian automotive industry, which is still taking its first steps in electric mobility, and the lack of consistent national legislation on the subject, other strategies appear more viable in the short term. In addition to the cost barrier, which restricts most Brazilians from purchasing electric cars, the energy crisis experienced in Brazil from June 2021, causing frequent increases in electricity bills, could further delay the widespread adoption of electric mobility.

However, there is an urgent need for strategic development to promote sustainability in mobility, and fleet renewal stands out as a policy that can bring more benefits to the environment in Brazil and can be implemented in a shorter period than its electrification. At the same time, the development of alternatives by sectors of the Brazilian automotive industry, through the coordination of a national plan, can make Brazil a strong player in sustainable mobility.



AI & TECHNOLOGY: YOUR BODY AS A CONNECTED NETWORK

This article discusses Artificial Intelligence (AI) in relation to body, mind, and the impacts this network has on us. We are living through a technological revolution that brings about various benefits and convenience in our everyday lives. On the other hand, the new era of the machine-man relationship has significant psychological impacts. Whereas before there was a duality in these two spheres, today their relationship is much more symbiotic.



Cristina Jensen,
Customer Experience



Tania Cerqueira,
Innovation

HUMAN-MACHINE CONNECTIONS

The act of thinking, according to the Oxford English dictionary, is actively using one's mind to organise related or connected ideas.

Bloom's Taxonomy (revised)



Benjamin Bloom described levels of learning and the diverse states of thinking, breaking them down into fundamental building blocks of; remembering facts and basic concepts, analyzing information through experimenting and making connections, evaluating, questioning and judging information, and, finally, creating something new.

This hierarchy is also present in how computers operate.

Human connections are the result of millions of years of interaction. When it comes to computers, these much newer learning systems become part of our lives in a short period.

For example, the pain of a slap on the face or the warmth felt from an expression of affection results from a system of communication between mind and body. The network of reactions we have in each one of our learning experiences generates a series of connections and actions.

“A NEURAL NETWORK APPLYING
ALGORITHMS INSIDE A BOX IS NOT
THAT DIFFERENT FROM NATURAL
NEURONS USING DATA AND
RECOGNIZING PATTERNS IN A BOX
THAT IS YOUR HEAD.”

AMY WEBB

Futurist Amy Webb’s book “The Big Nine” is an introduction to what is AI and a provocation on how the thinking machines of large corporations can subvert humanity – even in its economic and geopolitical aspects. In other words, it explores what expressions of this hyper learning can be projected into the future and the possible consequences. So, would it be possible for a machine to innovate, to have a creative consciousness?

Haven’t we got there yet?

POSITIVE ASPECTS OF THE TECHNOLOGICAL REVOLUTION

The technological revolution frees us from many tasks and processes – either because we are sure that machines can do better than we can (more efficiently and with less error) or because we don't like doing certain tasks but we must do them.

Based on an analysis of tech concepts tested by Ipsos, three important pillars reveal the human motivations behind the technological transformation.

1. **It improves our lives**, because it enables people to focus on priorities.

For example:

- Smart homes recognise how many people are in the house at what time, adjusting temperature and light throughout the day depending on the household's needs/dynamics.
- Music and films suggestions can be made with knowledge of an individual's preferences. Further, this can be connected to biometric information and experiences from the day that indicate the person's mood at the time, making it possible to customise scenarios.

Based on guiding information, the machine understands the “mood,” connects pieces of information, and calculates appropriate suggestions. Artificial Intelligence connects all devices and processes information to make life easier and more fluid.

2. **Do it for me:** With the concept of the “You of Things”, we include our body as part of the network that interacts with data from other devices, and automatically sends and replies to messages.

During the pandemic, how many of us have connected to smartwatches and apps to increase our motivation and exercise? When we share our

accomplishments, we also send messages from our bodies to the device. With sleep-inducing devices, for instance, we send messages regarding temperature decreases and sound relaxation waves for our body to understand that we should sleep. These pieces of information supplement one another. At times, the body sends info to the device and, at others, the device sends info to the body.

3. **Control:** Removing error potential is another feature we can outsource to a smart machine. From knowing the ingredients of a food order to managing deliveries including surveillance devices, since they are expected to measure our temperature when entering an enclosed location, or something more extreme, such as keeping track of who tested positive for Covid-19 and thus controlling the spread of the pandemic.

So changes in the overall context inevitably change the way we look at innovations. With the pandemic, for example, there is a new need for surveillance apparatuses, making them more acceptable. become more acceptable.

Another topic of vigilance is with regard to sustainability. If the planet is doomed, should we watch the recycling habits to identify who has a responsible action with the environment versus who doesn't? Should we do something about it (reward/punish)?

The acceptance of each of these technologies, and how to proceed with them, will changing according to the discussions that develop in the social sphere. Discussion of the needs, of the new possibilities, and of the ethics of each these actions.

ANOTHER MORE COMPLEX AND SIDE TO THE TECHNOLOGICAL REVOLUTION

Everybody knows that apps can make our functional life easier – no question about it. But why doesn't it always work? Why don't people feel happier with this plethora of “conveniences” that Artificial Intelligence offers us?

If apps came to solve our lives, to let's focus on the tasks that give us pleasure. Why are rates of anxiety, insomnia, overeating and stress so high?

How is Covid-19 impacting people?⁵³

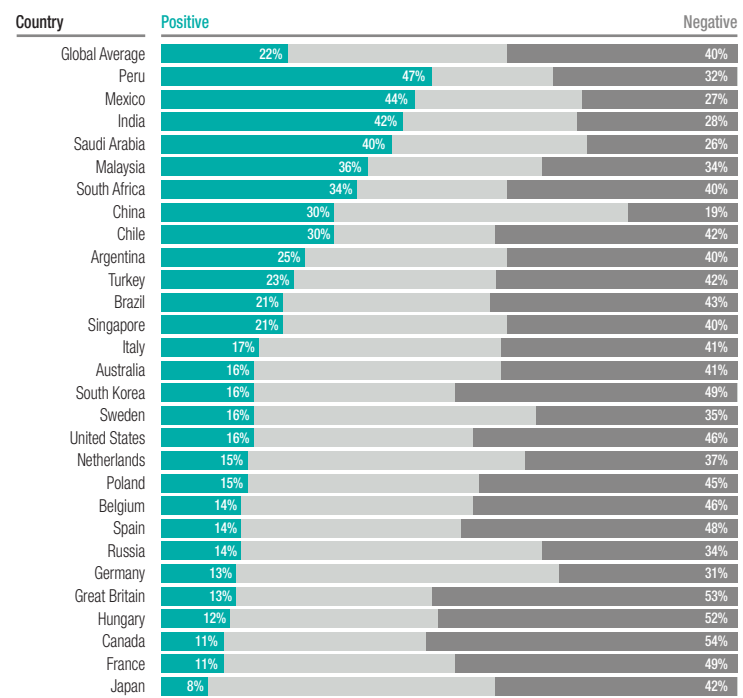
	AU	BR	CA	CN	DE	ES	FR	IN	IT	JP	MX	RU	KR	UK	US	ZA
Insomnia	12%	26%	17%	16%	14%	25%	18%	14%	22%	6%	38%	17%	10%	16%	15%	25%
Anxiety	23%	41%	30%	23%	7%	26%	19%	20%	25%	6%	35%	32%	15%	28%	28%	31%
Depression	17%	11%	11%	4%	8%	10%	5%	19%	12%	5%	15%	18%	13%	16%	19%	20%
Migraines	7%	14%	7%	6%	5%	10%	7%	11%	11%	6%	14%	8%	8%	7%	9%	10%
Over eating	19%	39%	29%	14%	10%	23%	9%	19%	19%	9%	30%	23%	14%	25%	19%	29%
Under eating	4%	8%	4%	8%	1%	6%	2%	14%	4%	1%	9%	4%	5%	4%	7%	7%
Increased smoking	7%	10%	7%	7%	9%	13%	6%	10%	11%	5%	12%	14%	9%	7%	9%	8%
Over exercising	2%	4%	3%	5%	2%	10%	3%	14%	11%	2%	5%	2%	3%	3%	5%	4%
Under exercising	20%	35%	29%	31%	25%	29%	17%	18%	34%	39%	30%	30%	38%	25%	19%	29%
Increasing alcohol use	10%	9%	13%	8%	8%	9%	6%	10%	6%	9%	5%	9%	9%	13%	10%	3%
Decreasing alcohol use	5%	6%	4%	9%	3%	5%	3%	11%	5%	1%	13%	4%	4%	4%	4%	17%
None of these	43%	22%	36%	37%	53%	29%	52%	37%	27%	44%	22%	28%	37%	38%	41%	30%
Prefer not to answer	6%	5%	4%	6%	4%	5%	4%	11%	3%	6%	6%	7%	4%	4%	5%	3%

Q. Are you suffering from any of the following as a result of COVID-19?

16,038 adults polled in 16 countries from May 7-10, 2020



What long-term impact, if any, do you think the past six months will have on your mental wellbeing – positive or negative?⁵⁴



EVEN ROBOTS ARE TIRED

To understand why we continue to suffer, we must think about how humans work compared to how machines work. Whereas machines accumulate data, work with unlimited processing of information, have a particular goal and find the best way to fulfill it, the functioning of the psychic apparatus is very different and quite a bit more complex.

Going back to body and mind, we know that the mind wants to control the body, but that is not always the case.

Of course, our minds and reasoning operate so that we can complete everyday tasks, but there is also something behind this that makes us act, or do things we don't want to do, and the reasons for behaving in these ways are less clear to us.

ARE WE REALLY IN CONTROL? WHO IS IN CONTROL? IS IT THE MACHINE? IS IT ME? OR A STRANGER WITHIN ME??

Sigmund Freud revealed that the conscious mind is only the tip of the iceberg of the psychic apparatus. This raised the idea that we are not even in control of our actions.

Between what we supposedly want to be and do and what we manage to be and do in the real world, there is a series of "psychic negotiations" in a complex mental system that takes us on a journey which is more often filled with frustration than pleasure.

Attempts to change lifestyle habits are often full of guilt. Why can't we do what we have consciously set out to do? Well, because we are not machines!

And, with the technological revolution and Artificial Intelligence, we are even more vulnerable. In addition to the unconscious operating as part of the psychic apparatus, a new and unknown desire is now in the picture: Artificial Intelligence. A machine that knows more about me than myself, that understands my needs and likes, and develops a whole scenario of information then offers it to win me over.

Machines have the possibility of infinite storage and connecting of information, which offers countless possibilities, near-absolute knowledge. What about the human mind? Limits are imposed by our memory which, unlike the machine, is finite, not able to make all connections, and unable to immediately access all information. Between the machine and mind is a wide area of vulnerability.

We also see industries seducing us with offers that relate to diet, physical activity, and sleep monitoring apps. This might be seen as manipulation to sell more, making people more vulnerable to consumption. But if trust and purpose are the basis of loyalty and repurchase, that relationship must be based on truth and aimed at making consumers' lives easier.

Based on algorithms that monitor all of our actions, searches, habits, places we go to, and so on., the machines know what I want; what I think I want (conscious desires), and what I don't even know that I want (unconscious desires). And this is the most important insight regarding the new way of retaining customers and consumers.

Through understanding the processes of our declared choices, the computer can predict behaviours beyond this.

But, once again, without ethics in the relationship, it will not last.

ACCELERATION OF THE "YOU OF THINGS" IN BRAZIL

The little or no physical contact that we had at the beginning of this pandemic decade has led to synesthetic bubbles in a population for which collectivity and physical contact have always been important for connection.

Was that the last straw that will finally make the "Internet of Things" (IoT) become a new lifestyle instead of a gadget for cool people?

In the race for body and mind, voice stood out this year in which face-to-face meetings were scarce.

Alexa has been in Brazil since 2019, but many studies indicate that its use has increased during the pandemic. According to a survey conducted by the data science consultancy company Ilumeo in Brazil, almost one in five Brazilians use voice assistants daily. It is worth noting that various services have a Portuguese language option. Besides Alexa, there is Google's Google Assistant, Apple's Siri,

and Samsung's Bixby. Although most people say they use assistants because they are convenient, entertainment is a strong factor in Brazilians' use.

Through analysing data and interactions from companies that have already anticipated the trend of voice as an important means of engaging consumers, Disney, for instance, has developed an experience focused on Children's Day. Its focus is to use technology to encourage interaction with Disney's characters.

Akinator also returned with a strong presence in homes during the pandemic. The more the assistant is used, the more knowledge it acquires. There is the feedback of questions that the assistant learns and then becomes sharper, able to guess the answers quickly.

Voice assistants have also become more user-friendly for the elderly. Voice technologies are more interactive and physically accessible than smartphones and computers. For older people with sight loss or Parkinson's disease, for instance, it's easier to talk to a virtual assistant than to type on small keyboards. Robot Zara is an extreme example of voice activated technology that can keep someone company, read to them and entertain them.

Voice-based social networks such as Club House, WhatsApp groups with voice, and podcasts have benefited from this algorithmic network of connections, communications, and searches for the same interests. The system understands and "serves" a series of content that makes the distant world suddenly closer.

DOES SAFETY GENERATE INSECURITY?

Although face masks aim at the health and safety of the general population, facial recognition technology is hampered by people wearing masks, and affects citizen and business security.

There are solutions in development. Supermarket chains are already working with facial recognition of people wearing masks to prevent theft and robbery so that they no longer prevent recognition. Other elements in ourselves or in our

surroundings leave traces that enable the identification of people. It's the smell of data.

But the entire recognition network sparks discussion on privacy issues and the right to remain anonymous and the owner of our own information, whether it is navigation or identity. So, issues of general data protection law are placed on the table to ensure the confidentiality of personal information, or at least the right to authorise the use of data.

Despite the data protection movement, what we have seen so far is the impossibility of using devices, apps and services if we do not accept their privacy terms and conditions. The individual is almost forced to accept them to remain included in the world of technological innovation.

Can we say no? Is it really a choice? The discussion still has a long way to go. Brands and companies that are on the side of individuals may lose information in the short term, but perhaps gain loyalty and trust that will place them in a privileged place in the near future.

HAS OUR WORLD BEEN OVERSHADOWED?

And what is the world around us? Is it real? Is it what they show us, what we can see?

Since Plato, people have been questioning the erroneous and misleading knowledge that comes from our senses and perceptions. In his myth of the cave, Plato refers to prisoners (ordinary men), who are stuck in the beliefs and the world they see.

As in Plato's cave, we see shadows and hear echoes of reality, a distortion of what happens. Whereas in Plato's time the distortion was seen in opinions or beliefs based on common knowledge, today this could represent an often manipulated network of information and connections, given to us through technology.

POINT OF VIEW

AI and technological progress can increasingly imprison people in ignorance. As progress is inevitable and putting on the brakes is not possible, all you can do is establish limits and rules to minimise the effect of an extremely distorted world.

We have already suffered the distortion of what we can see based on the awareness of consciousness. But how many of us have seen something without seeing a message? Have we missed the most important part of what was said or written? Did we truly miss it, or did we not want to see it?

If our mind is already playing tricks on us, we need to at least minimise the external influence of the type of information that is provided, so that we can have more autonomy and freedom of choice: real and unmanipulated freedom.

Alexa, I can't see... Please, turn on the lights?



Saúde São Paulo
GOV. SP
Secretaria de Saúde
Fundação de Amparo à Pesquisa
e Inovação



SONG

UNDER PRESSURE

Shortness of breath in the moans of the ais

The fever, its phantoms, its terrors

Unhurriedly, step by step, more and more

The beast advances through the corridors

The doctor walks with caution

Studies the enemy's wiles

The brave nurse overcomes fear

She cares little about the extent of the danger

The world is in a state of misfortune, in the hands of God

The people won't give in, they're blindfolded goats

It's there and here without law, without further warning

All I know is that we must believe

We're all part of this story

Even if the fools bluff their way to death

In a game of truths and lies

A double game of chance and luck

Science spreads its wings

Hope ahead as a guide

With Saint John in prayer, the pajelança

The intervention of Xangô in magic

In this corner here of poetry

Home of fantasy and reason

Open the door and a new day comes in

Through the window a heart

The voice of a boat at dawn

The dawning sun drying the lung

Last year if I died on the road

This year I'll die no more

It's to ride on the back of the toada

To disembark from the pandemic train

It's to make a rounded rhyme

The final burst of joy

Let's go friend, let's go

Let's take that drink

Let's sing that life is only now

And if I sing, amigo, life is nothing

Lyrics and music: Chico Buarque, Gilberto Gil and Ruy Guerra™

PEOPLE AS A PRIORITY FOR SOCIETY AND BRANDS



Sandra Zlotagora Pessini,
MarComs



Yves Bardon,
Ipsos Flair Programme

With the long-awaited advance of the massive immunization of the population against Covid-19 and the lifting of most health restrictions, Brazil is about to close a chapter. If we are still to live with the virus that projected the country into the worst crisis of its history, we will progressively regain a sense of control over our lives and dreams.

The mourning for the lives lost, the financial impact of the crisis on many families, the mental burden of working multiple days in a confined space and the initial fear of resuming collective routines, whether in offices or in other public places, will leave marks on our behaviour and our consumption.

But Covid-19 is no longer the first concern of Brazilians as shown by the September 2021 wave of the Ipsos global survey, What Worries the World. Poverty and social inequality, placed in the first place of concerns, is a reflection of great social disparities made wide open by the pandemic and is a priority political agenda for 2022, the year of presidential elections in Brazil. The division between different groups in society and the economic pressure on the middle classes and the most vulnerable wears down the government's image and creates pressure for the candidates for president of the republic. 79% of Brazilians in the Ipsos culture war

CONCLUSION

survey say that there are tensions in the country between the rich and the poor; 77% see tension between social classes. The elected candidate should put people as the priority of his political programme.

And this is probably one of the big lessons of the pandemic. At the conclusion of the seventh edition of *Flair*, which had the theme “What unites us, what divides us”, we wondered what the legacy of the pandemic was going to be. What the eighth edition shows us is that people really are at the centre of everything. The pandemic gave a new meaning to the “people centric” notion that already permeated the most attentive companies in the country, both in their human resources management and in their value proposition to the market.

The pandemic and the brutal changes that occurred in consumption reinforced the need to understand human motivations and gave room for new connections - who has not been touched by a simple handwritten note on the food delivery bag or the restaurant playlist that accompanied the order?

The work of a significant part of the population that changed overnight to home office erased the fine line between professional and private, but created a flexibility never dreamed of in this dimension - I work from where I want, how I want, when I want.

The demands for more social justice and representativeness in companies have not diminished with the pandemic; on the contrary, we have seen many organisations strengthen their policies, actions, recruitments regarding Diversity and Inclusion.

Putting people as a priority for society and brands in an authentic and non-demagogical way brings a huge complexity in the planning of organizations. Individuals have many layers that go beyond citizens and consumers, they are rational and emotional, full of tensions and contradictions. They change their opinions, they are influenced, they influence others.

But, they are also the key to understanding the world around us. The pandemic enshrined the concept of the BANI (Brittle, Anxious, Non-linear, Incomprehensible) world, devised by the American anthropologist, Jamais Cascio, in 2018. Indeed, the

unexpected and unplanned event caused our frailties to be exposed and created a dystopian environment, creating individual and collective anxiety. In order not to lose connection with reality, in the midst of so many changes in behaviours and attitudes brought about by Covid-19, empathy and the search for deep understanding of people have been essential.

These are the notions that will probably guide the actions of the organisations and brands that will stand out in 2022. And they will, of course, be able to count on the expertise of Ipsos, which has been dedicated to understanding people, markets and societies since 1975.

ABOUT IPSOS

ABOUT IPSOS

Ipsos is an independent market research company, present in 90 markets. The company, which has more than 5,000 clients and 18,600 employees, delivers data and analysis about people, markets brands and societies to facilitate the decision making of companies and organizations.

The world's largest polling company, Ipsos also operates in the areas of marketing, communications, marketing and public relations, media, customer experience, employee engagement, social intelligence, and public opinion.

Ipsos researchers evaluate market potential and interpret trends. They develop and build brands, help clients to build long-term relationships with their partners, test advertising, and measure public opinion and measure public opinion around the world.

For more information, please visit: **www.ipsos.com/pt-br**

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That's why our passionately curious experts offer, in addition to the most accurate measurement, analysis for a true understanding of society, markets, and people. To do this, we use the best of science, technology and know-how, and apply our principles of safety, simplicity, super speed and substance in everything we do.

So our customers can act faster, smarter and bolder. More daring. Ultimately, success comes down to a simple truth:

YOU ACT BETTER WHEN YOU ARE SURE.

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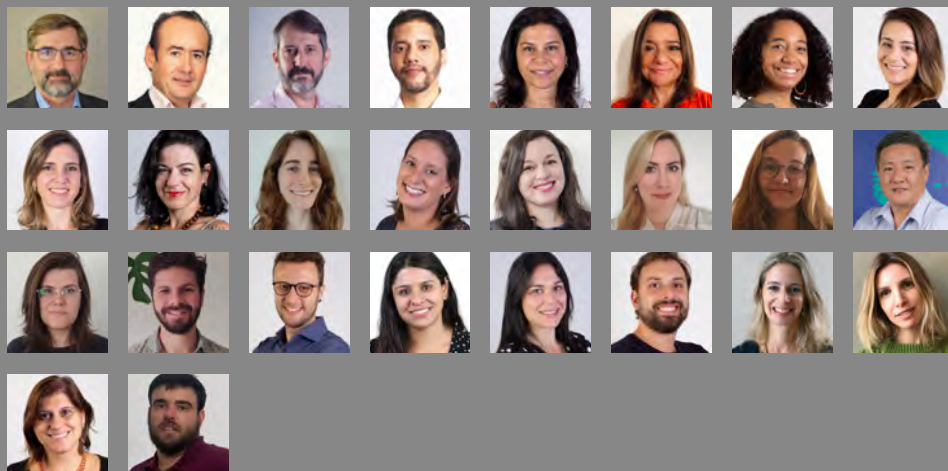
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