



PULSO BRASIL

Ipsos

June | 2016 summary

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Survey date: **June 2-13, 2016.**
Margin of Error: 3 p.p.

IPSOS PUBLIC AFFAIRS

Politics, Economy, Consumption and Social Agenda

POLITICS



- Country directions
- President's approval rating
- Political barometer
- Electoral potential
- Political agenda

ECONOMY



- Consumer Confidence Index
- Main household expenses
- Disposable income
- Investment, savings and financial security

CONSUMPTION



- Impact of the crisis on consumption and *trading down*
- Attitude and purchase intention
- Consumer goods
- Durables

SOCIAL



- The country's main problems
- Public policies
- Economic and social agenda
- Values and behavior

REPRESENTATIVE DOMESTIC

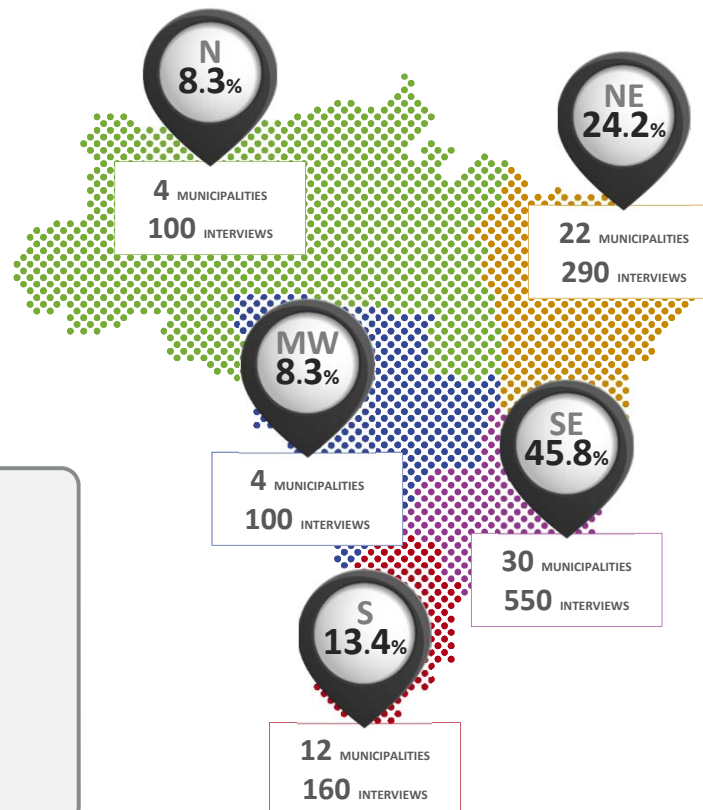
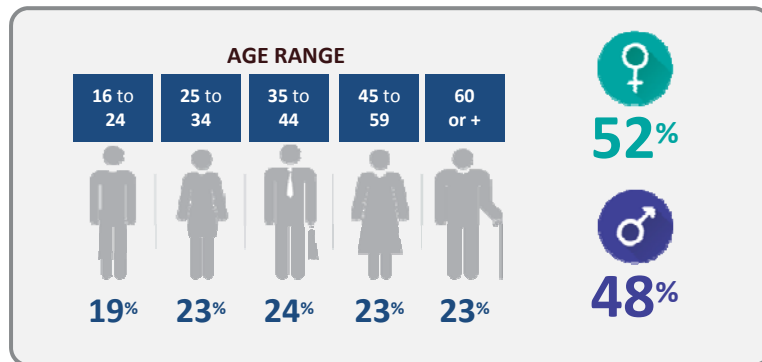
SAMPLE

1,200 interviews,

personal and in-home, carried out monthly in

72 municipalities across Brazil.

Probabilistic sample, with quota in the last selection stage and ± 3 percentage points margin of error, representative of the Brazilian population - in urban areas - according to IBGE's official data (Census 2010 and PNAD 2013).



SIZE (NUMBER OF INHABITANTS)

Less than 100,000	24 MUNICIPALITIES 240 INTERVIEWS
100,000 to 500,000	13 MUNICIPALITIES 130 INTERVIEWS
500,000 to 1 million	20 MUNICIPALITIES 330 INTERVIEWS
More than 1 million	15 MUNICIPALITIES 500 INTERVIEWS

SIZE (NUMBER OF INHABITANTS)

Capitals	22 MUNICIPALITIES 570 INTERVIEWS
Interior	39 MUNICIPALITIES 450 INTERVIEWS
Metropolitan Areas	11 MUNICIPALITIES 180 INTERVIEWS

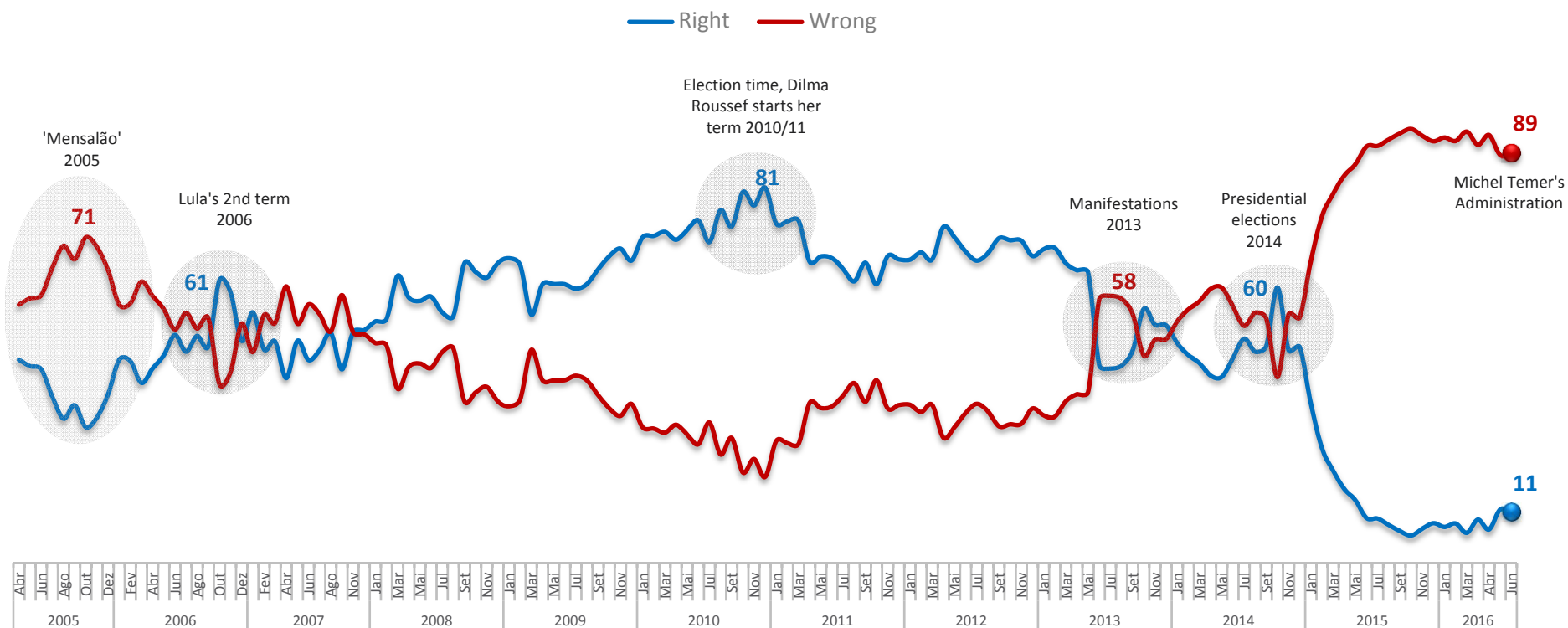
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CONTEXT

Temer's administration is evaluated as bad/very bad by 43% of the population. Currently there are still doubts regarding the efficiency of his Government for these first months.

COUNTRY'S DIRECTION

2005-2016



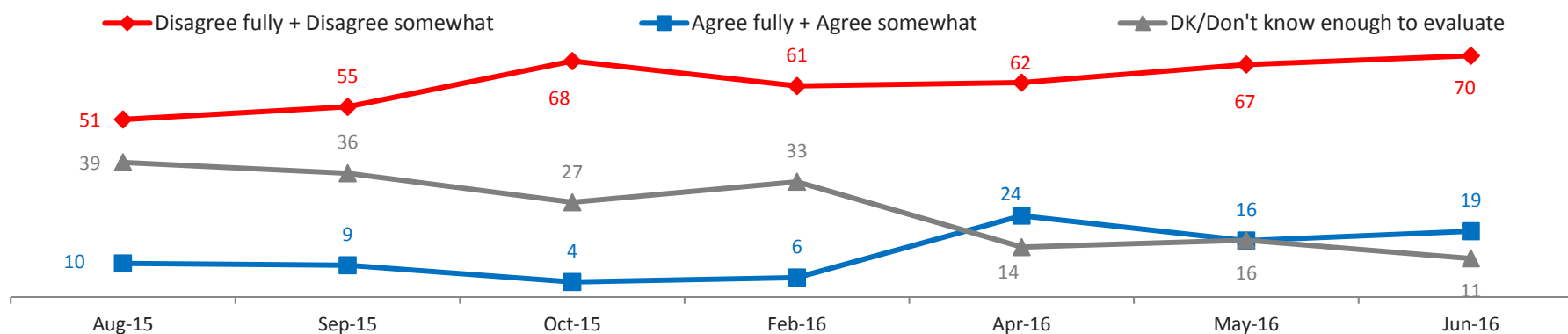
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POLITICAL BAROMETER

Michel Temer sees his disapproval gradually increase in classes C, D and E, while his approval grows in classes AB. Economic and social agendas are decisive in this scenario.

POLITICAL BAROMETER - IPSOS

MICHEL TEMER



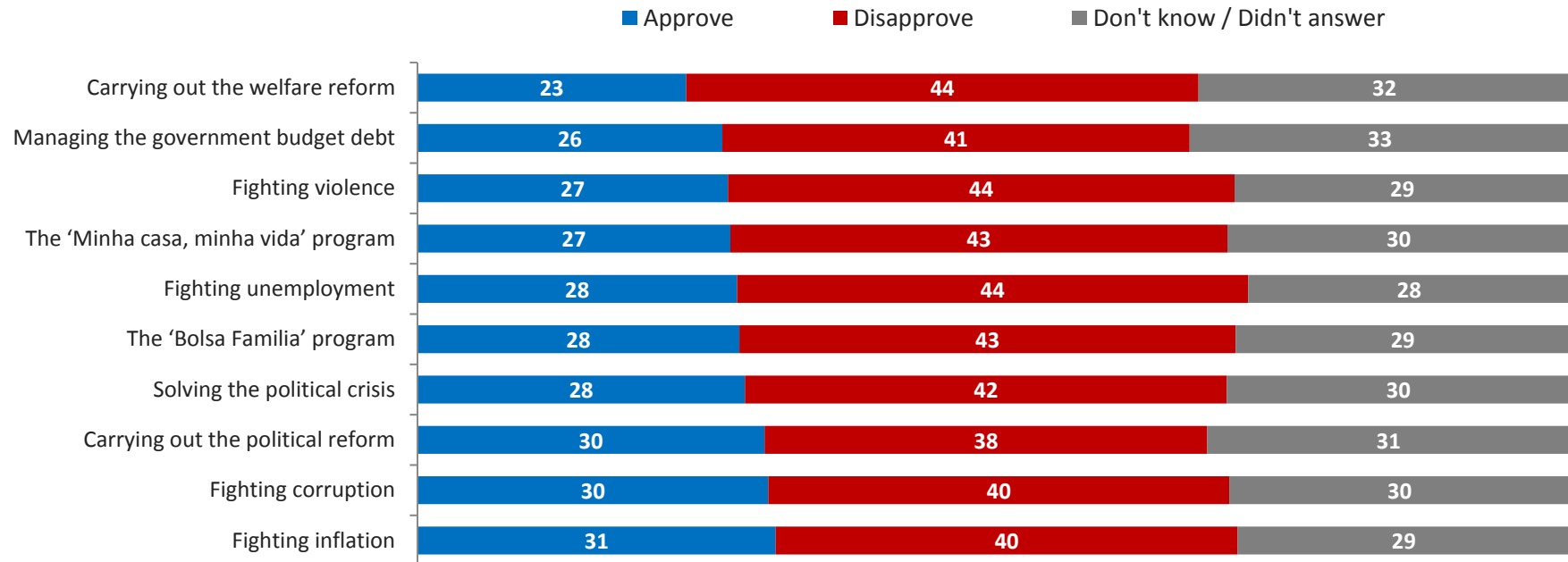
% of Approval		Sep 15	Oct 15	Feb 16	Apr 16	May 16	Jun 16
Sel	AB	9	4	7	15	19	26
	C	11	5	6	29	17	17
	DE	5	4	3	23	12	15
Region	Northeast	4	2	4	25	20	15
	Southeast	11	6	5	22	16	18
	South	16	1	9	36	12	20
	North	3	7	3	22	10	34
Schooling	Midwest	9	7	11	10	23	22
	Illiterate	4	4	3	15	10	14
	1st To 5th Grades	8	3	6	27	16	17
	6th to 9th Grades	10	5	5	24	13	22
	High School	10	4	6	25	19	19
	Higher education	9	7	6	16	21	19

% Disapproval		Sep 15	Oct 15	Feb 16	Apr 16	May 16	Jun 16
Sel	AB	67	78	73	73	73	67
	C	55	67	62	60	66	71
	DE	42	60	44	50	62	69
Region	Northeast	52	62	47	60	62	71
	Southeast	59	70	68	66	67	70
	South	60	70	68	55	72	71
	North	26	58	44	50	70	58
Schooling	Midwest	59	79	63	68	70	74
	Illiterate	47	62	45	63	59	70
	1st To 5th Grades	46	62	48	53	64	69
	6th to 9th Grades	55	66	62	61	67	65
	High School	58	72	67	64	69	74
	Higher education	69	80	79	76	73	70

% Don't know enough		Sep 15	Oct 15	Feb 16	Apr 16	May 16	Jun 16
Sel	AB	23	18	20	11	8	7
	C	35	29	32	12	17	11
	DE	53	36	53	27	26	16
Region	Northeast	44	36	48	15	18	14
	Southeast	30	24	27	12	17	12
	South	24	29	23	9	17	9
	North	71	35	54	28	20	8
Schooling	Midwest	32	14	26	23	6	3
	Illiterate	49	35	52	22	31	17
	1st To 5th Grades	46	35	46	20	20	14
	6th to 9th Grades	34	29	32	15	19	13
	High School	32	24	27	11	12	7
	Higher education	22	13	15	9	6	12

THE REFORMS AND THE COUNTRY'S AGENDA

Do you approve or disapprove the way President Michel Temer has been dealing with...



AP6) Do you approve or disapprove the way President Michel Temer has been dealing with ...:
Values in percent. Results may exceed or fall below 100% due to rounding or multiple answer questions

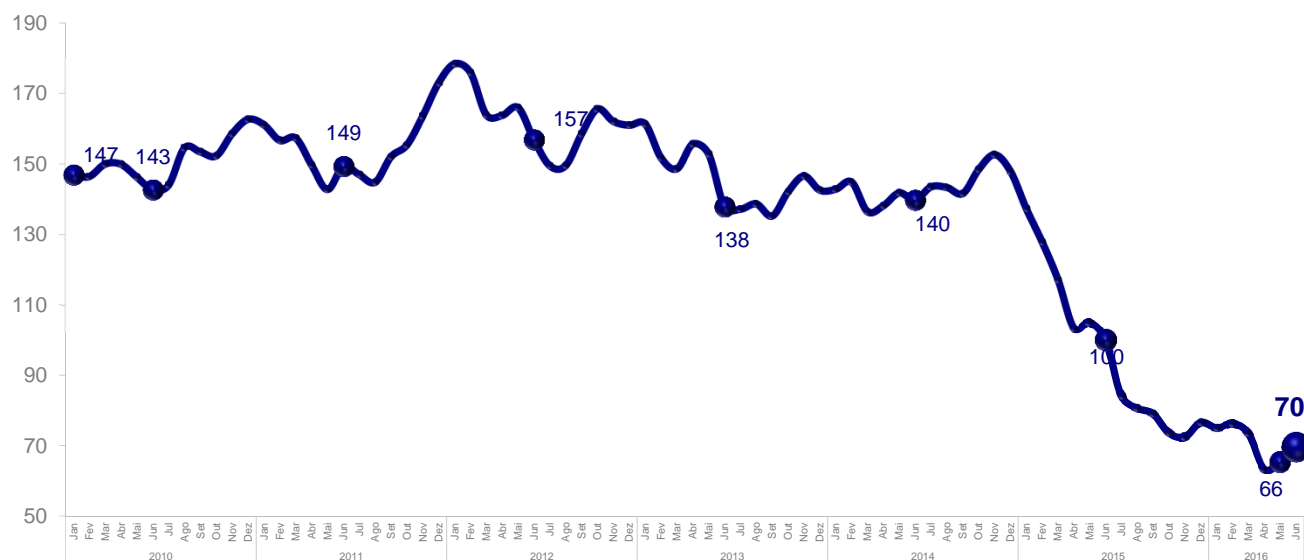
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FINANCE AND TRUST

Consumer Confidence Index grows 4 points and seems to confirm gradual growing tendency. Classes AB and the Southeast region presented higher growth during the month of June.

DOMESTIC CONSUMER CONFIDENCE INDEX

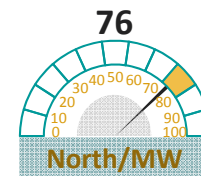
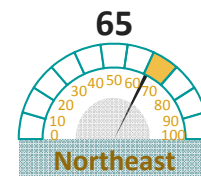
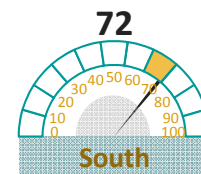
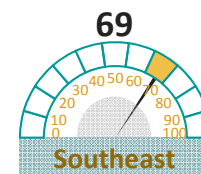
- 70 points in June
- Growth of 4 points when compared to May
- Highest scores are in classes AB and in the Southeast region



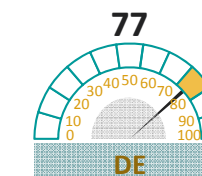
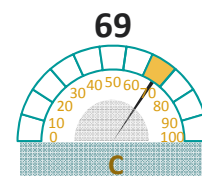
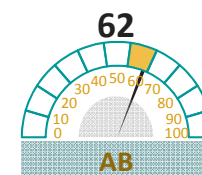
Source: ACSP / Ipsos



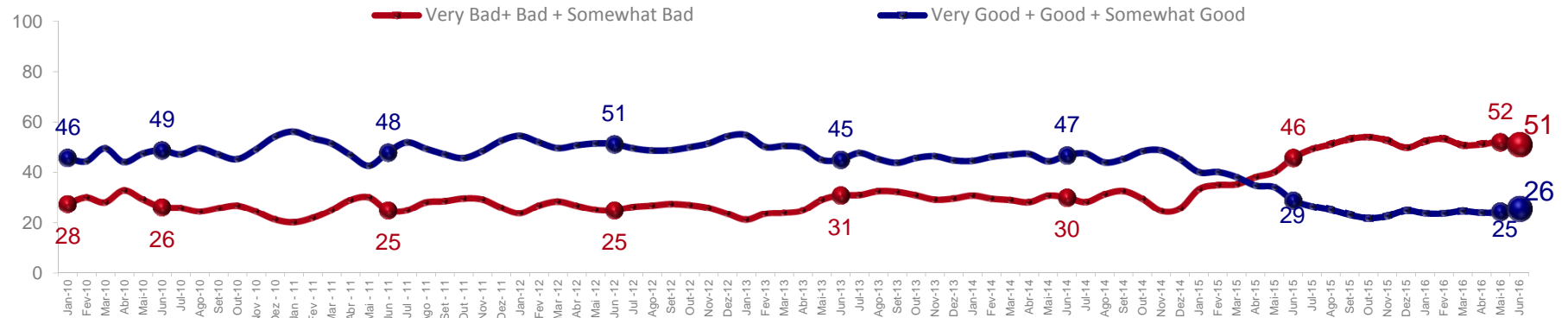
REGION



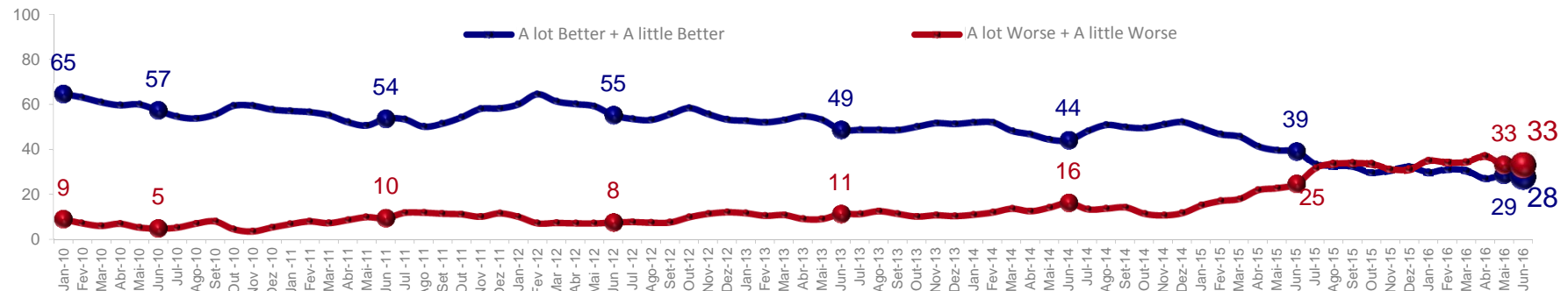
SEL



PERSONAL FINANCIAL SITUATION EVALUATION – TODAY



PERSONAL FINANCIAL SITUATION EVALUATION – IN 6 MONTHS TIME



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IPSOS' *POINT OF VIEW*

Brazil goes on awaiting the outcome of the impeachment process trial amidst the 'Lava Jato' investigation - which has reached out all the way to important names of Temer's administration.

CONTEXT | COUNTRY'S DIRECTION

For the Brazilians, the country is still in the wrong direction.

The change of Government brought no changes regarding the improvement perception concerning the country's direction.

In June, the direction Brazil was heading to was considered wrong for 89% of the people, against 88% in May. The permanence of this perception reflects the general dissatisfaction of Brazilians with the country and with the political class, which at the moment goes beyond the ruler. In addition, as the Pulse Brazil data reveals, this negative scenario is the result of the current political and economic instability, the unemployment and inflation.

CONTEXT | PRESIDENT'S EVALUATION

The first evaluation of Michel Temer's interim administration points to negative indicators and reveals uncertainties.

The evaluation of the Temer's administration is divided between those who consider it bad or very bad (43%) and those who do not have a set opinion (22% of Brazilians did not know how to evaluate the current administration and another 29% consider it regular). Only 6% consider the current government good or very good.

The current interim President didn't undergo an electoral process, therefore he is not strongly associated with a Government agenda or with causes that have a strong appeal to the public. His administration does not even carry an appeal to fight corruption, as a counterpoint to the image of his predecessor, strongly associated with the scandals evidenced by the 'Lava Jato', according to the public opinion perspective.

POLITICAL BAROMETER - IPSOS | MICHEL TEMER

Michel Temer: a matter of class?

So far Temer's approval is higher among classes AB and has increasingly grown since February to date.

It is important to note that classes AB were the ones that most saw the Consumer Confidence Index plummet in the last 2 years and reached 49 points in April this year - the lowest considering the historical series. The Confidence retake of this portion of the population is significantly higher than in others; the growing approval for Temer's performance can be interpreted as a sign of support to the current Government's team and economic agenda, and also reflects the rejection that much of this segment has to Dilma Rousseff's and the PT's (Partido dos Trabalhadores) administration.

The opposite effect is detected among classes CDE, where the disapproval of Temer has been increasing - especially from April onwards, when the impeachment of the suspended President Dilma Rousseff took shape. The challenge of the current Government is to establish an agenda that will convey security to the less privileged sectors of the population in order to gain confidence from classes CDE.

ECONOMIC CONTEXT | CONSUMER CONFIDENCE

The tenuous and gradual retake of consumer confidence remains.

The Domestic Consumer Confidence Index for the second consecutive month presented a growing tendency. This growth is most significantly sustained by classes AB and by the South and Southeast regions; it is the combination of the support to President Dilma's stepping down (they were the most favorable segments for the impeachment) and Government Temer's performance approval.

Analyzing in perspective, consumer confidence will only return to the old days' positive levels if the confidence indicators of employment, of medium/large purchases and investment for the future resume growth - which still has not occurred. Reassuming confidence at this point is linked to a less pragmatic indicator, which is the evaluation of the region's economy today and in the next six months, and that receives strong influence of the results in the South and Southeast regions.

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GAME CHANGERS

