



PULSO BRASIL

Ipsos

September | 2016

summary

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Pulso Brasil, request a quote:

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Study conducted between: **September 06–16, 2016.**

Margin: 3 p.p.

IPSOS PUBLIC AFFAIRS

What is it?

1

It is the most comprehensive monitoring of political, economic and social indicators carried out in Brazil. It is carried out monthly by Ipsos Public Affairs since 2005.

2

It is especially useful for areas such as strategic planning, corporate image, economic planning and political strategies.

3

It provides decision-makers of the public, private and third sector areas with accurate and impartial information about the development of major issues that influence the directions Brazil takes today and will take tomorrow.

4

It provides simultaneously information for both specific decision-making and tracking long-term trends.

ADDRESSED AREAS

Politics, Economy, Consumption and Social Agenda



POLITICS

- Country's directions
- President's approval ratings
- 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 & behavior

METHODOLOGY

Sample

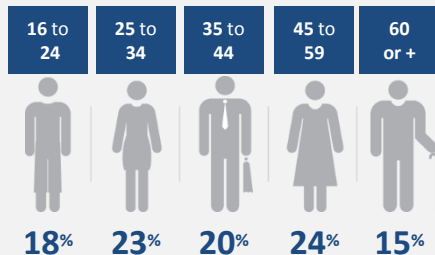
1,200 interviews,

personal and in-home, held monthly in

72 municipalities across Brazil.

Probabilistic sample, with quota in the last stage of selection and ± 3 percentage points margin of error, representative of the **Brazilian population** in urban areas, according to official data of the IBGE (2010 Census and 2014 PNAD).

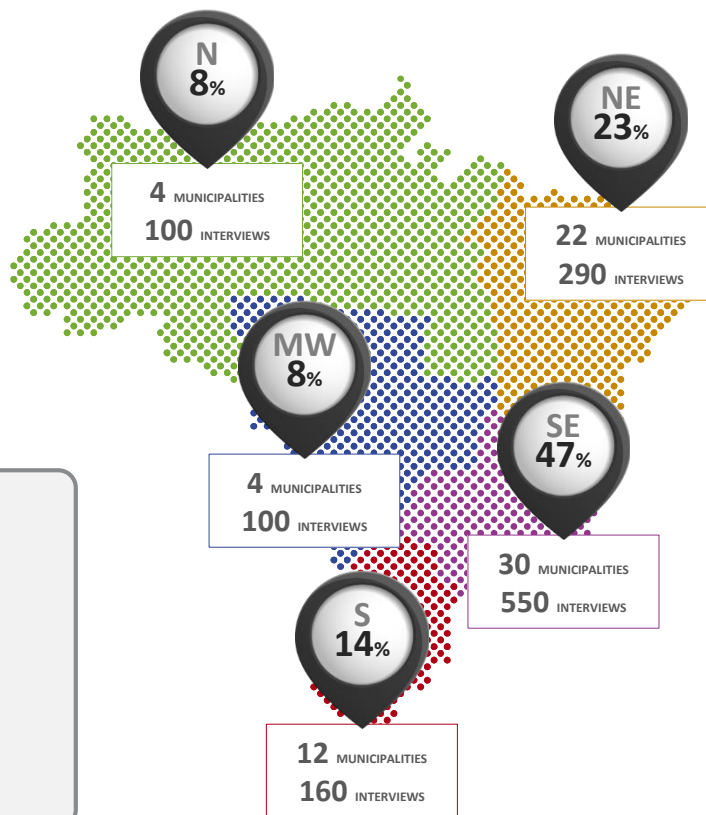
AGE RANGE



53%



47%



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

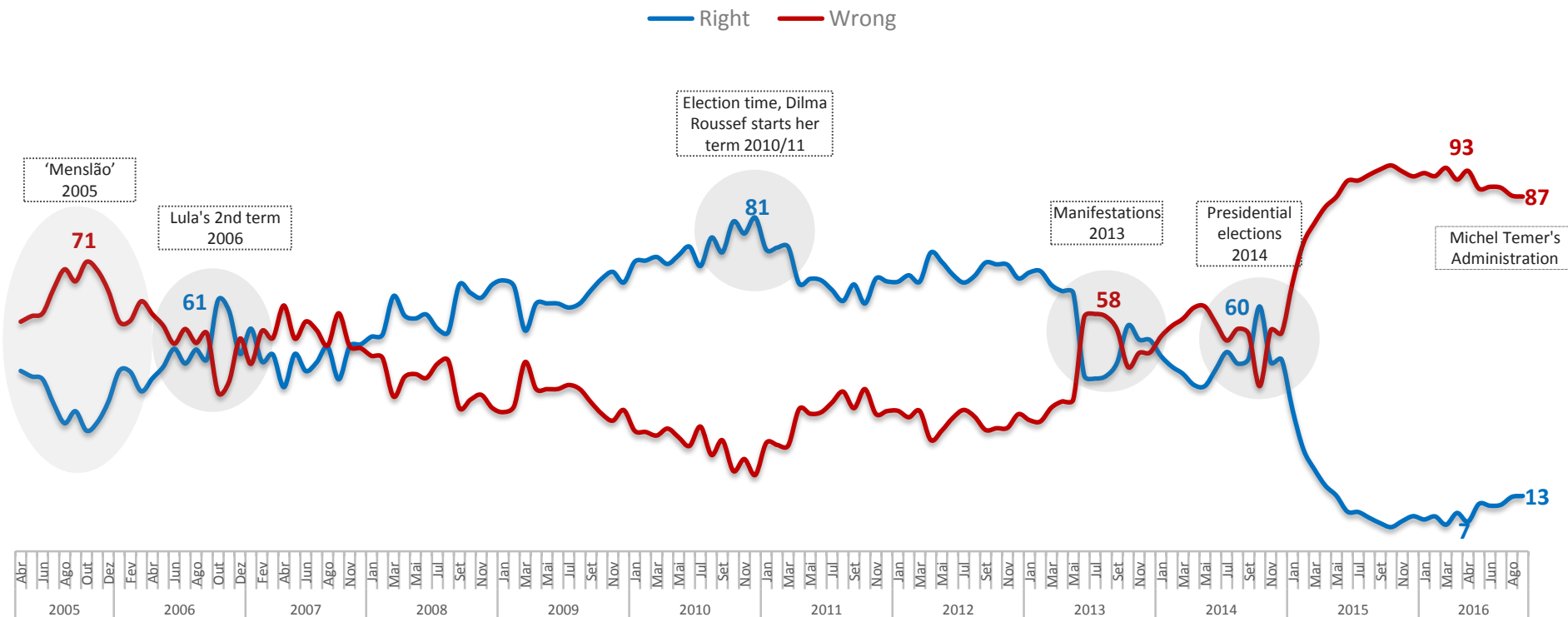
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CONTEXT

In September, the perception regarding the country's direction has stagnated at a negative level. Evaluation of Temer's administration drops 4% in the bad/very bad indicators, but it does not convert to good/very good.

Country's directions

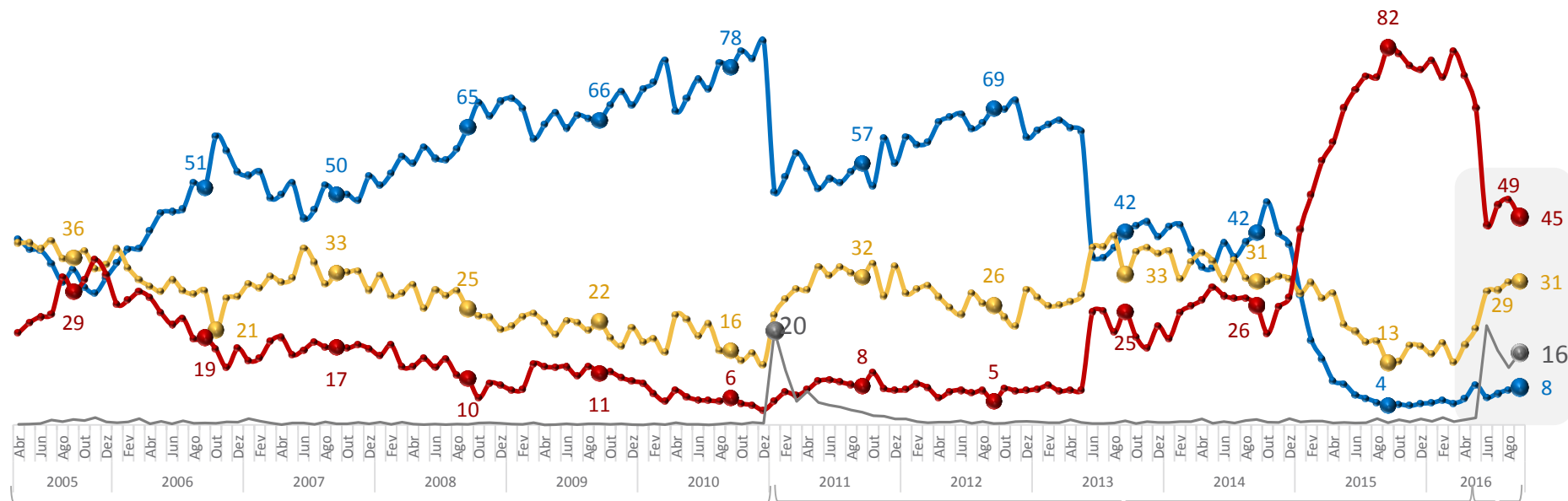
April 2005 – September 2016



PRESIDENT'S EVALUATION

April 2005 – September 2016

Very Good/Good Regular Bad/Very Bad Don't know/Didn't answer



Lula's Administration

Dilma Rouseff's Administration

Michel Temer's Administration

GAME CHANGERS

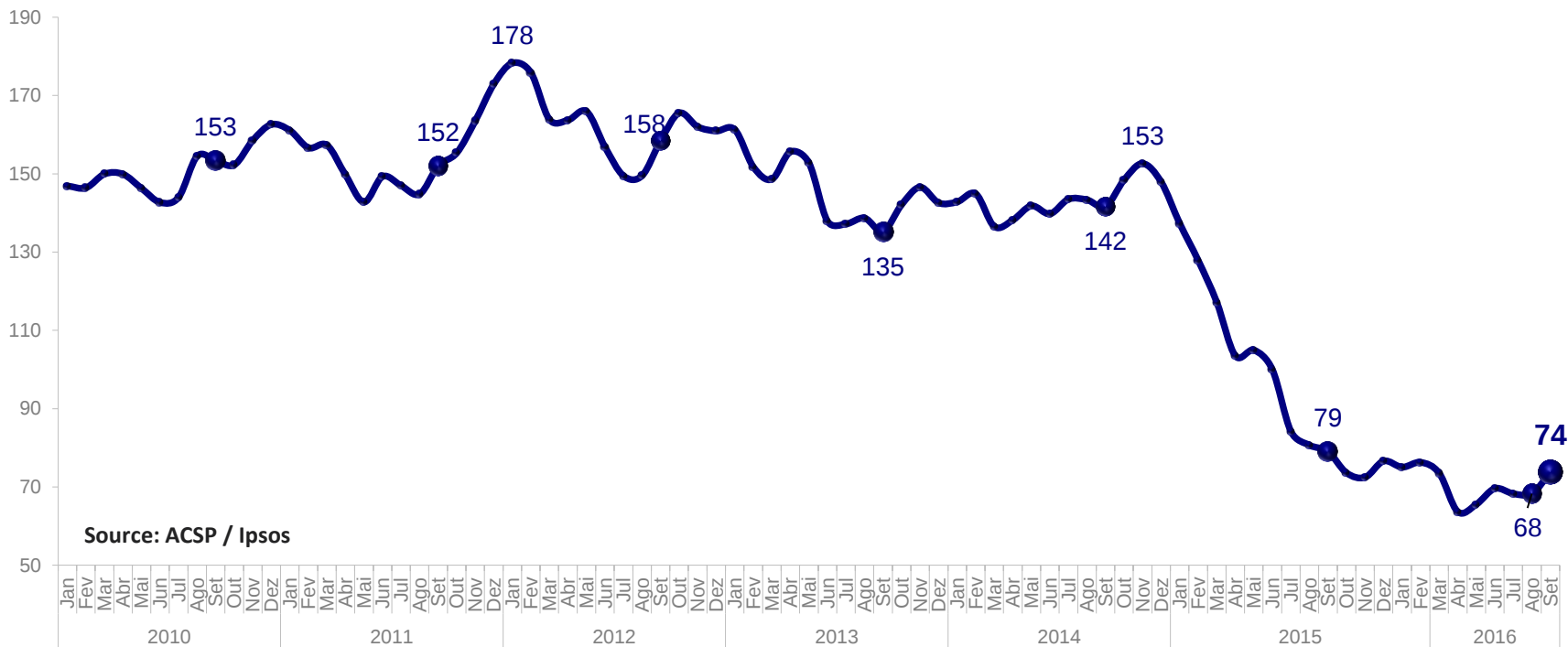
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FINANCE AND TRUST

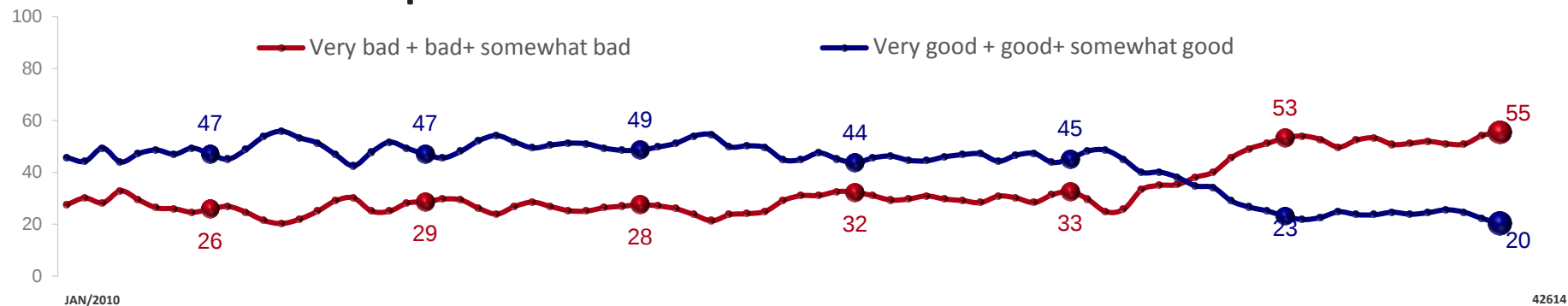
Consumer Confidence Index reaches 74 points and signals a gradual upturn. Perspective for the next 6 months, which were signaling small signs of improvement in the past readings, start to confirm.

DOMESTIC CONSUMER CONFIDENCE INDEX

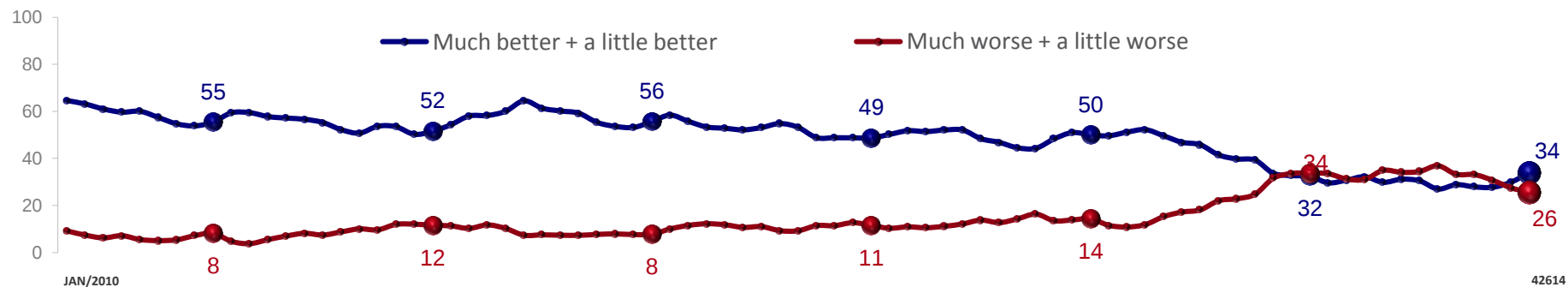
- **74 points in September (+6 points vis-à-vis August)**
- **Consumer confidence rose in all regions of the country, particularly the south region.**
- **In September, the CCI surged in social class AB (+7) and C (+7). Dropped 2 points in social class DE.**



Evaluation of the personal financial situation – CURRENTLY



Evaluation of the personal financial situation – IN 6 MONTHS



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IPSOS' *POINT OF VIEW*

The next few months should confirm the gradual recovery of consumption confidence, but not necessarily in politics. Temer's administration still generates uncertainties about its ability to govern and the lack of a positive agenda can influence the mood of public opinion.

CONTEXT | COUNTRY'S DIRECTION

Brazil goes on in the wrong direction.

In September, Brazil was considered on the wrong direction by 87% of people, the same index that was obtained in August. This index, which seemed to be on a shy improvement trend, remained stagnant at a negative level.

This perception is explained by the lack of aggressive actions of the newly inaugurated Temer administration. In addition, the data from Pulso Brasil shows that there is some distrust about its ability in solving major issues of the country, as well as carrying on the necessary reforms.

The bad mood regarding the country's direction is also related to a moral and institutional crisis through which we are going through: the support to 'Lava Jato' follows on at full speed and so is the disbelief in the politics and politicians, according to the data of the September's Pulso Brasil.

There is an institutional and leadership crisis that negatively impacts the perception of Brazilians regarding the current situation. The crisis through which we have been going through in the last 3 years has worsened people's quality of life, be it in terms of consumption, be it for public services, creating general dissatisfaction with the way things are in Brazil.

CONTEXT | PRESIDENT'S EVALUATION

The evaluation of Temer's administration continues at negative levels.

In September, the Temer administration was considered bad or very bad by 45% of Brazilians (against 49% in August and 48% in July). Those who were not able to answer added up 16%, against 12% in August and 16% in July. The administration was considered “regular” by 31% of the population, the same level obtained in August. The positive evaluations (very good or good) remained at 8%. That is: the Temer administration continues to be poorly evaluated and unable to build a positive agenda so far.

However, the level of disapproval by area of performance has dropped significantly, which can make room for improvement of the current Government's image, if the main problems of Brazil are well conducted and positively reflected on the life of the population.

It is worth noting that the major reforms on the agenda will demand an efficient communication strategy of the current administration, something that so far has fallen short. The public needs to understand how they will be impacted by these changes. The Government needs them (the public) to understand these changes, if they (Government) want to create a positive impact and win over their (public) support.

ECONOMIC CONTEXT | CONSUMER CONFIDENCE

Consumer confidence: today it is bad, tomorrow it will be better.

Consumer confidence has shown the first significant sign of recovery since Dilma Rousseff's step down, reaching 74 points in September. In April, month in which the impeachment was voted in Congress, the Domestic CCI was 64 points - the lowest in the historical series.

Consumer confidence will continue on a growing trend in the coming months because of the more positive perception Brazilian have regarding all indicators that cover the perspective for the next 6 months, especially job stability. The results confirm the analyses and forecasts informed using Pulso Brasil' data in recent months.

In addition, the quarterly report of the Central Bank foresees an inflation (IPCA) of 4.4% in 2017 and 3.8% in 2018, well below the 7.4 % forecasted for this year. The forecasts are also more encouraging for both the GDP and the drop in interest rates.

However, even if expectations for 2017 are better vis-à-vis 2016, the scenario will still present weaknesses both for the economy and for the political life of the country.

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