



PULSO BRASIL

Ipsos

October | 2016
summary

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Pulso Brasil, request a quote:
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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*
- Behavior and purchase intention
- Consumer goods
- Durables



SOCIAL

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

METHODOLOGY

Sample

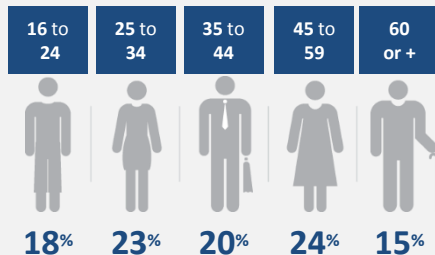
1,200 interviews,

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 (Census 2010 and PNAD 2014).

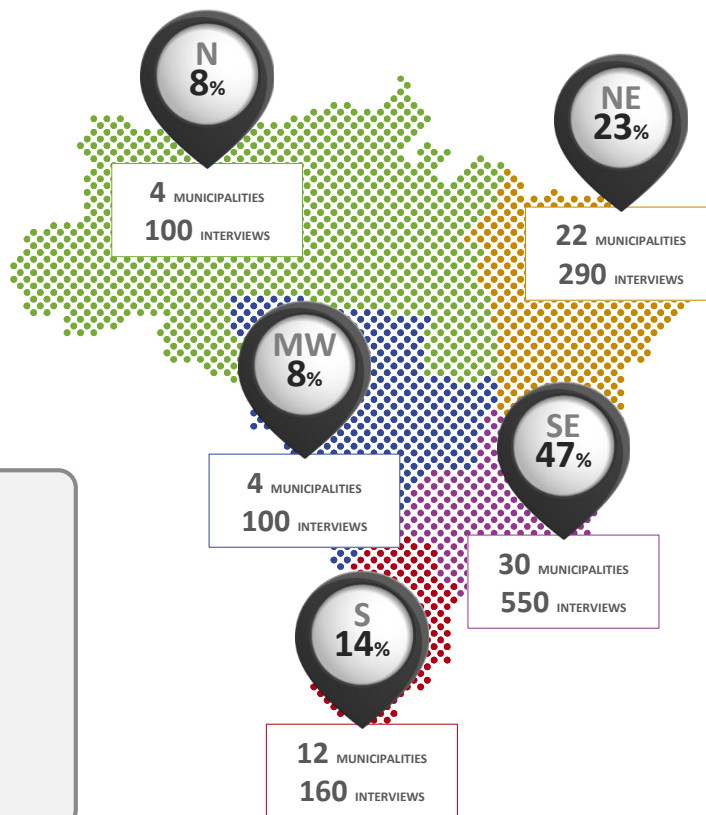
AGE RANGE



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

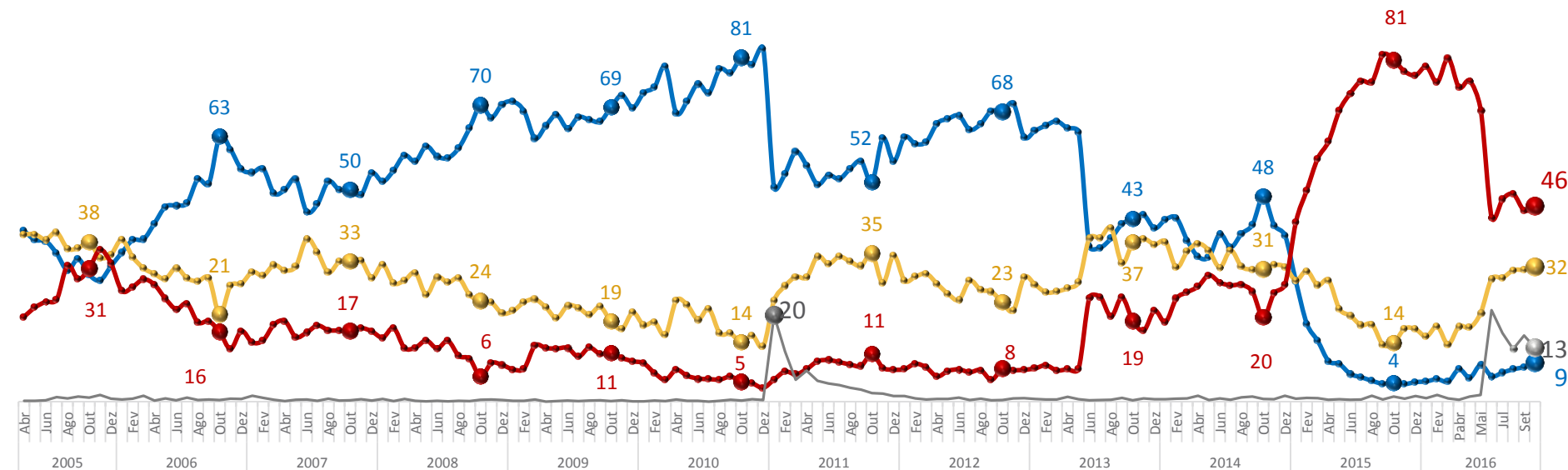
In October, the negative perceptions about the country's direction continued to drop - but they are still at a high level. Confidence in the country will resume with economic recovery and the political & social stability.



PRESIDENT'S EVALUATION

April 2005 – October 2016

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



Lula's Administration

Dilma Rousseff's
Administration

Michel Temer's
Administration

GAME CHA



AP4) Do you think the administration of President Michel Temer is very good, good, regular, bad or poor?

Values in percent. Results may exceed or fall below 100% due to rounding or multiple answer questions.

The tally on this question does not sum 100% because the answers 'doesn't know' and 'not answered' are not being presented

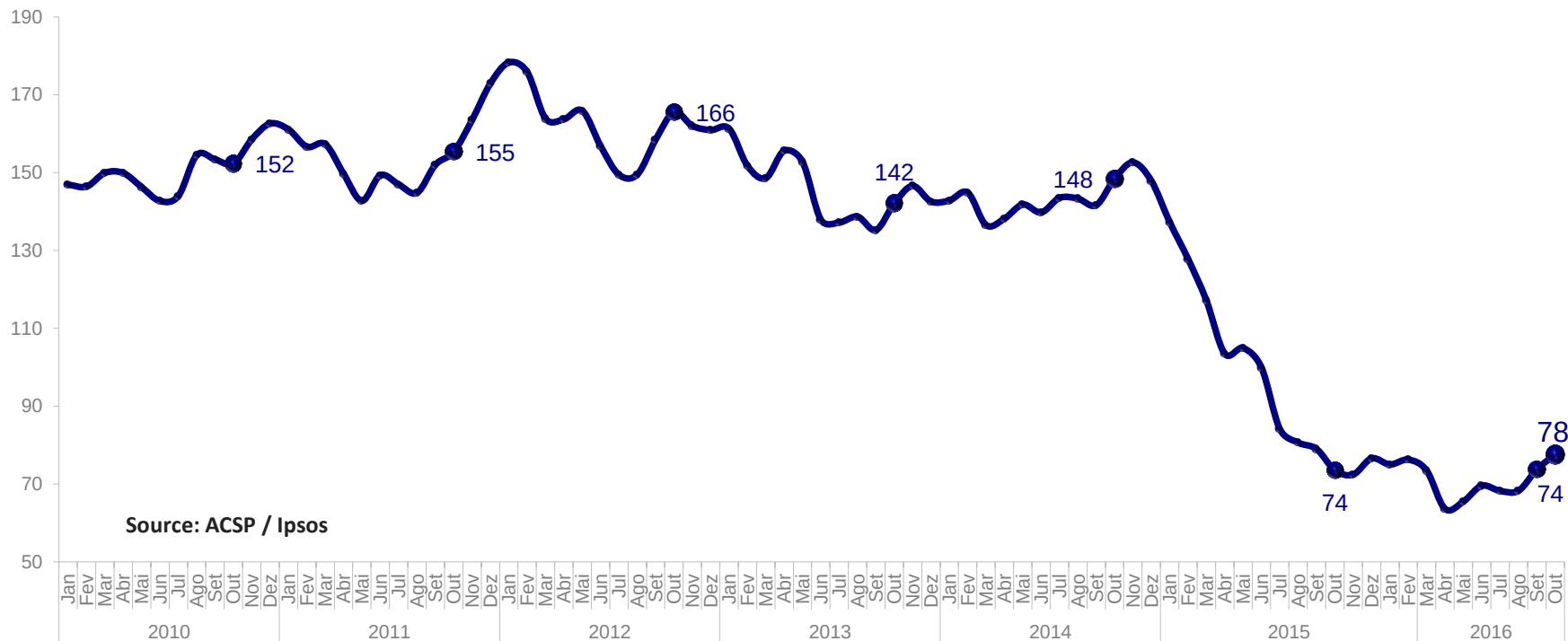
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FINANCE AND TRUST

Consumer confidence index reaches 78 points and signals a gradual upturn. Outlook for the next 6 months, which gave signs of improvement in the last readings, continue to confirm themselves.

DOMESTIC CONSUMER CONFIDENCE INDEX

- **78 points in October (+4 points compared to September)**
- **Consumer confidence continues growing in all regions of the country - special prominence to the southern region.**
- **Recovery trend of consumption confidence is based on expectations for the next 6 months.**



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IPSOS' *POINT OF VIEW*

The gradual recovery trend of consumption confidence is being confirmed. However, politically speaking, the feeling Brazilians have is still negative or of uncertainty regarding the new Government. Ongoing reforms may have strong impact on its image.

CONTEXT | CONFIDENCE IN THE COUNTRY

Gradual recovery trend of confidence in the country

In October indicators of the Pulso Brasil showed that the recovery trend of the confidence in the country is on its course, but still at a slow pace.

This trend is explained by the end of the impeachment process, but according to the data from Pulso Brasil (exclusive to subscribers) the recovery is still not full due to:

- (1) the stagnated economy;
- (2) institutional and moral crisis of the Brazilian policy and its main players and
- (3) doubts regarding the ability of President Temer in conducting the required changes in the country.

ECONOMIC CONTEXT | CONSUMER CONFIDENCE

The gradual recovery trend is being confirmed.

The recovery of consumption confidence is slowly being confirmed. In October, the CCI was 78 points, 4 points above the index seen in September.

This improvement is explained by the perception that the situation will be better in the next 6 months. The natural optimism of Brazilians that is combined with the inflation reduction forecasts for 2017.

Regardless that this confidence is recovering, it is not possible to currently see any reflection on consumer's behavior. Attitudes regarding consumption habits practically remain the same as those of the last months: cost reductions, change of more expensive brands for private label brands and shopping at cheaper supermarkets and the wholesale stores are very strongly present in the daily lives of Brazilians.

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We make our changing world easier and faster to navigate and inspire clients to make smarter decisions.

We deliver with security, speed, simplicity and substance. We are Game Changers.

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