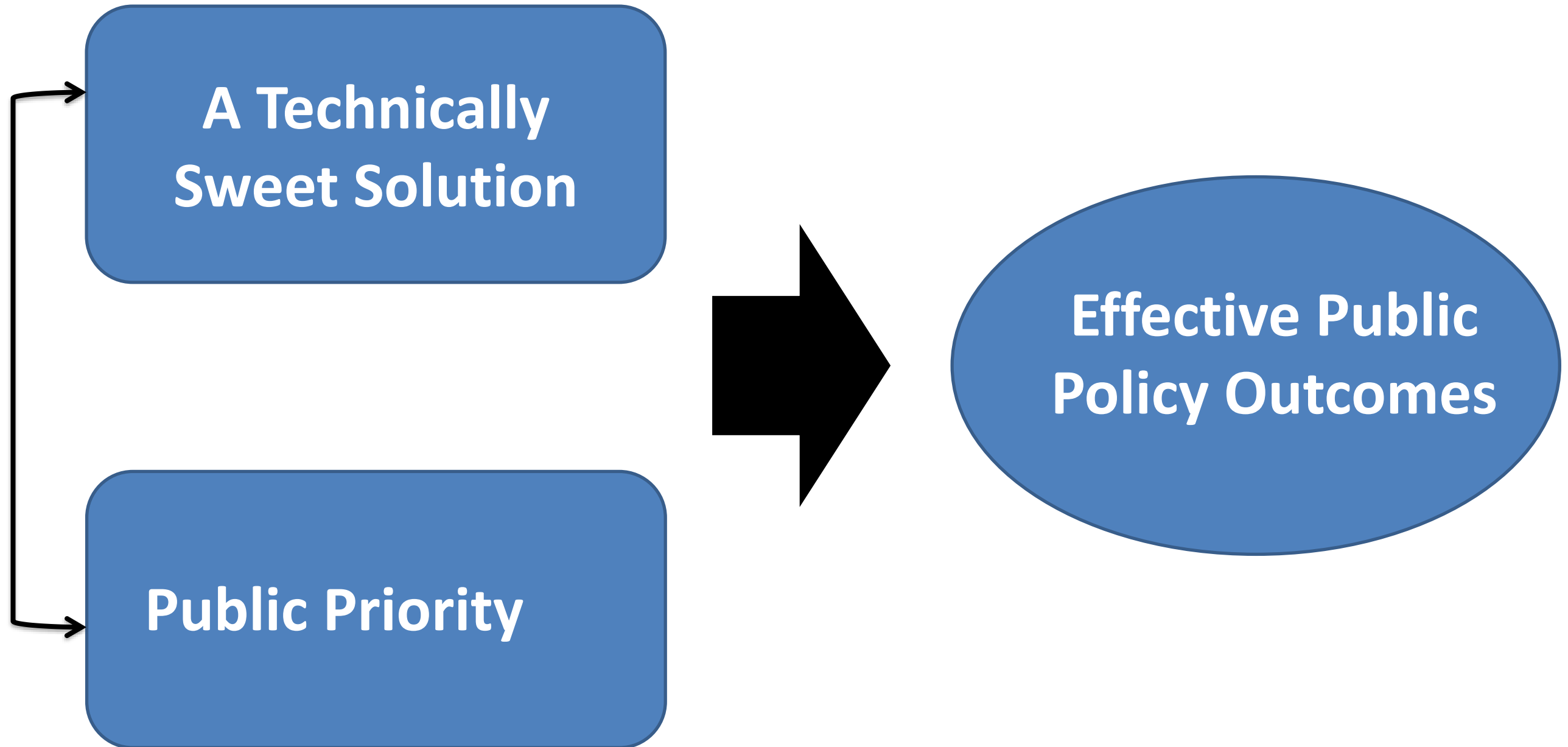


Public Opinion & the Brazil Infrastructure Agenda

Cliff Young
President, Ipsos Public Affairs

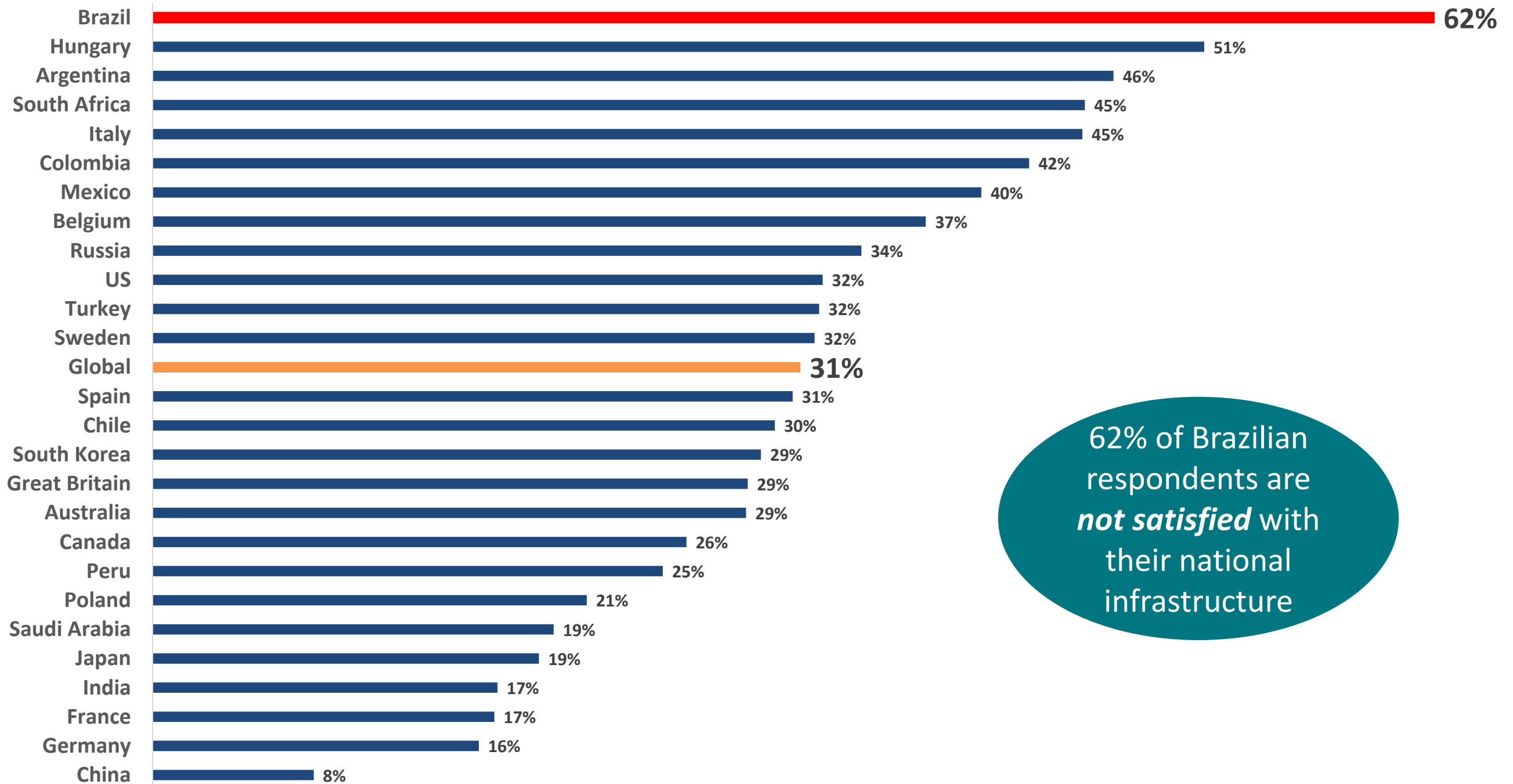
Agenda Convergence

Agenda Convergence



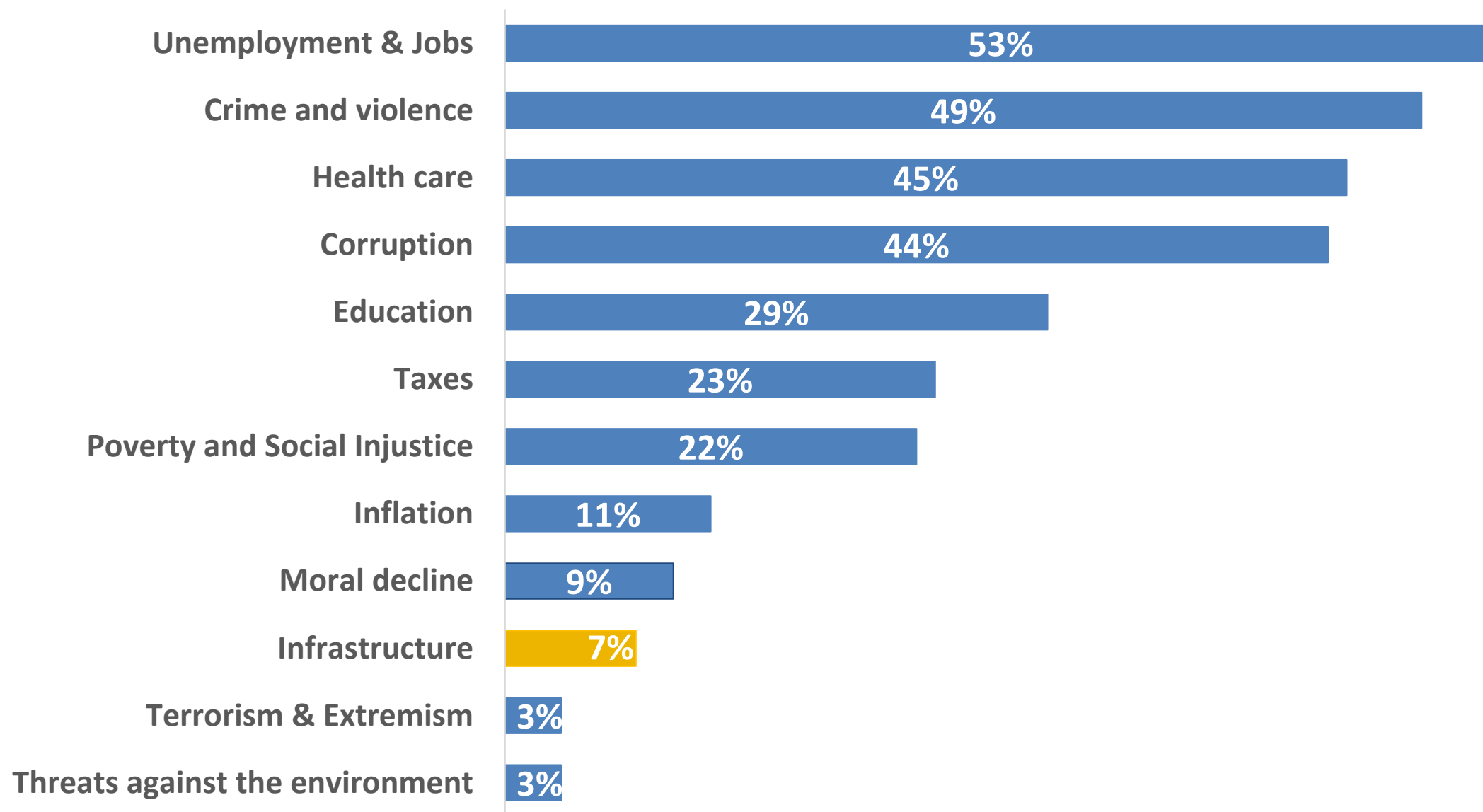
The Brazilian Infrastructure Agenda

Dissatisfaction with Infrastructure: Brazil leads the Pack!

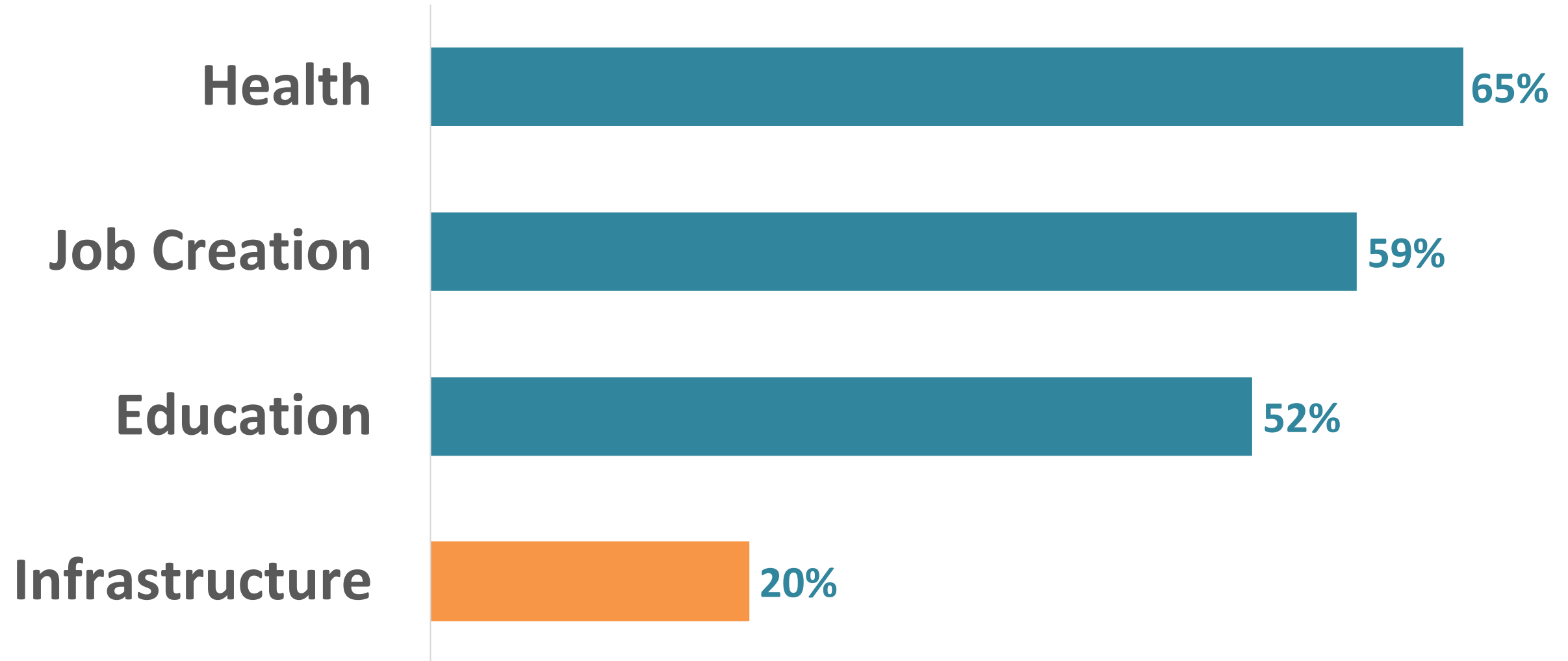


62% of Brazilian respondents are *not satisfied* with their national infrastructure

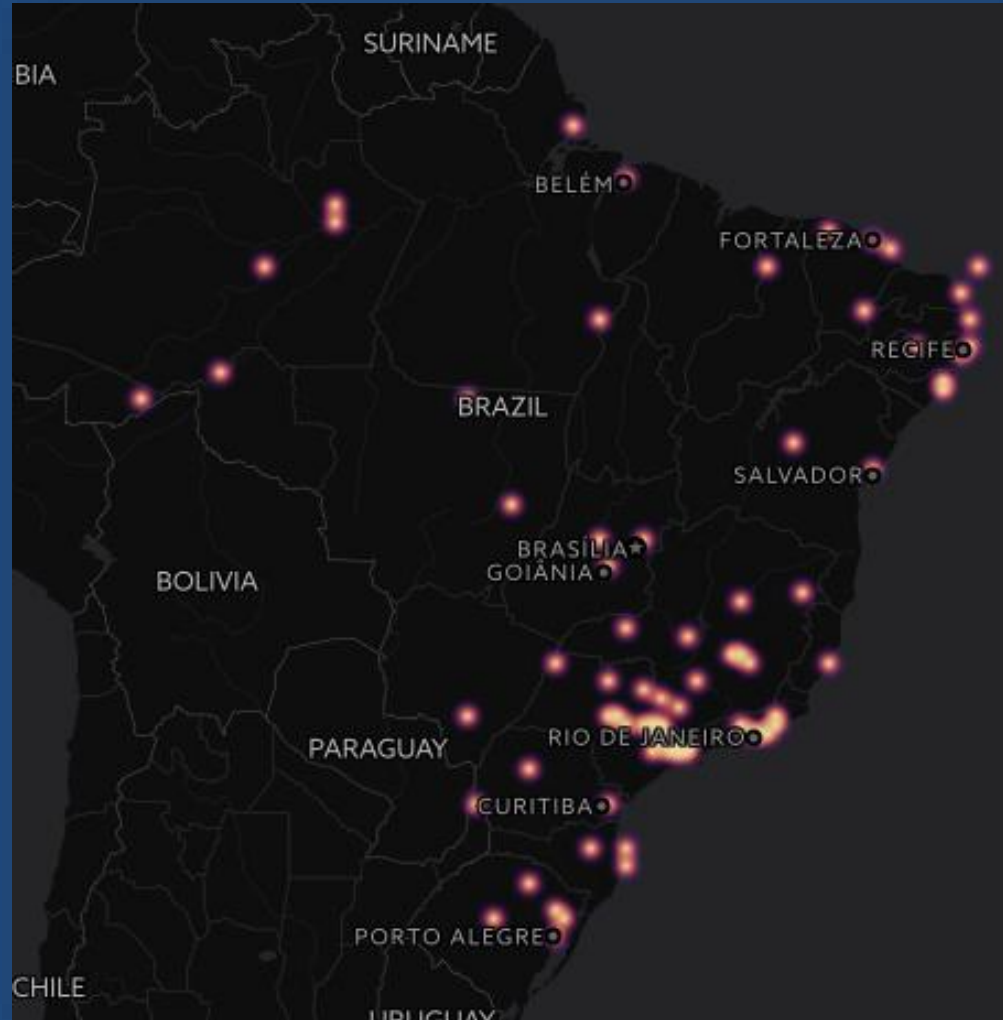
Infrastructure is *not* a priority in Brazil today!



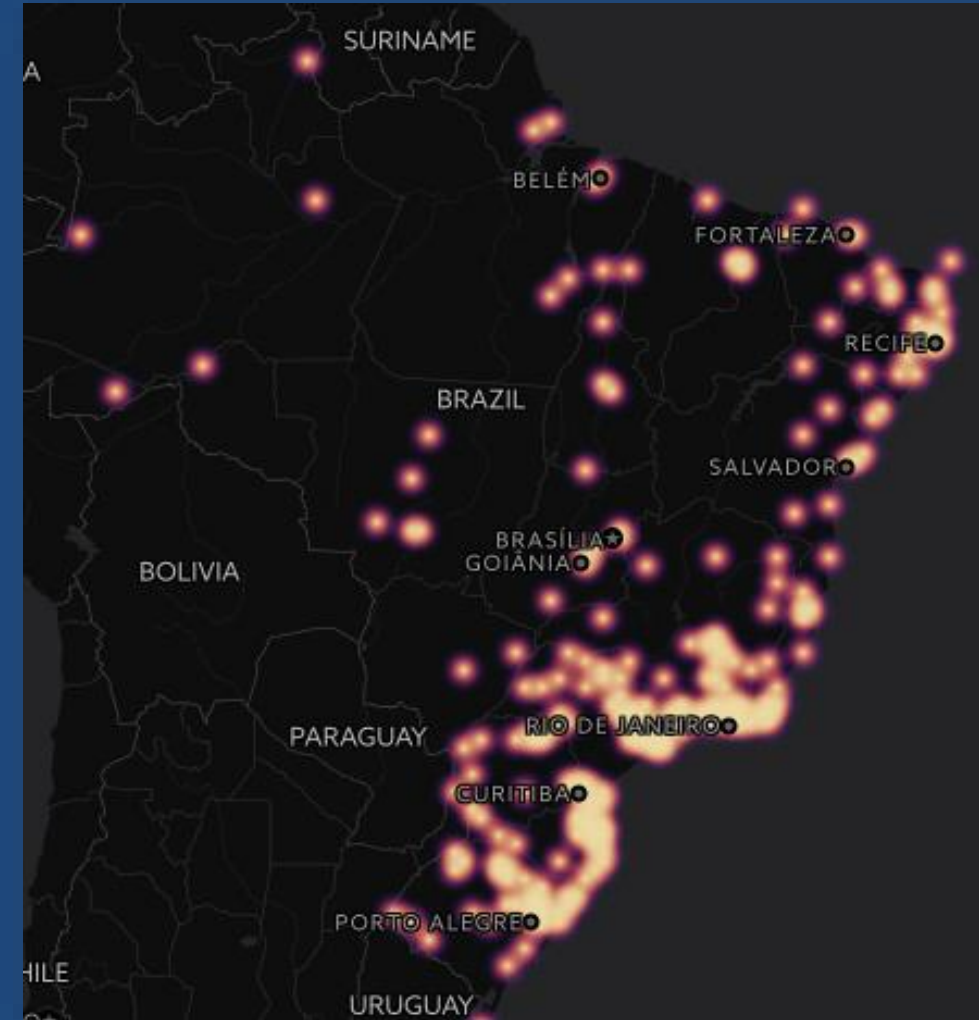
Infrastructure trails other areas as an investment priority



Discussions on Infrastructure in Brazilian Social Media



Discussions on Economy in Brazilian Social Media



Linking Infrastructure to Higher Order Priorities

Linking infrastructure to the economic agenda

Investment in infrastructure will
guarantee Brazil's **long-term
economic growth**

73%

Infrastructure projects can be an
important mechanism for **job
creation** in Brazil

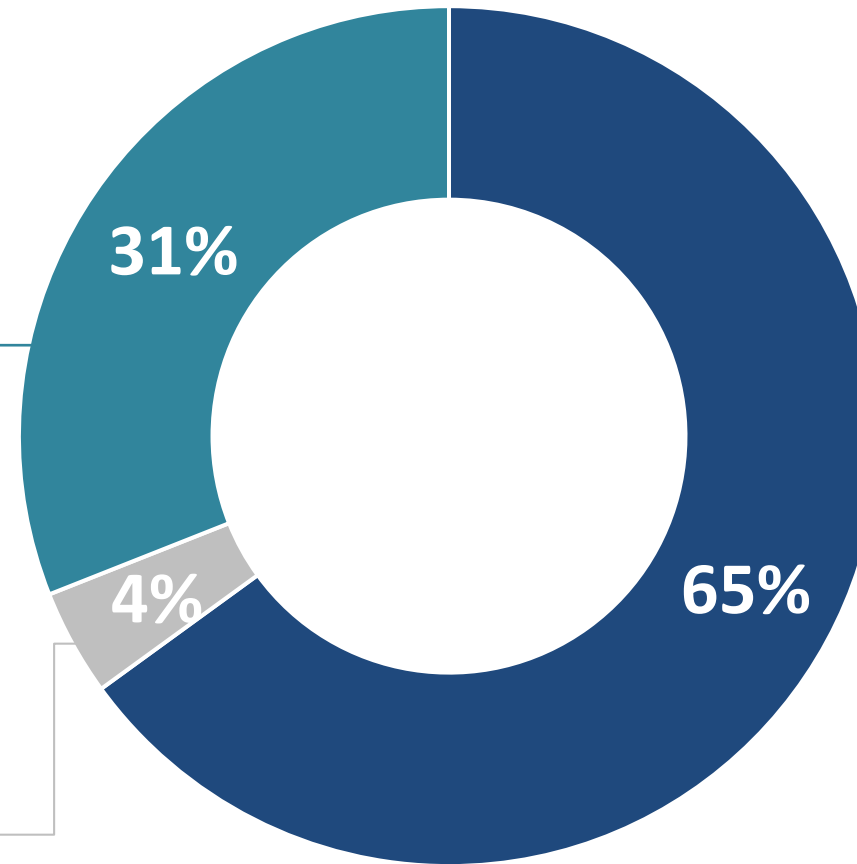
80%

Ipsos poll conducted October 7, 2016 among 1,005 US adults

Jobs over long-term economic growth

Brazil should invest more in infrastructure for **long-term economic growth**

Don't know



Brazil should invest more in infrastructure to **generate more jobs**

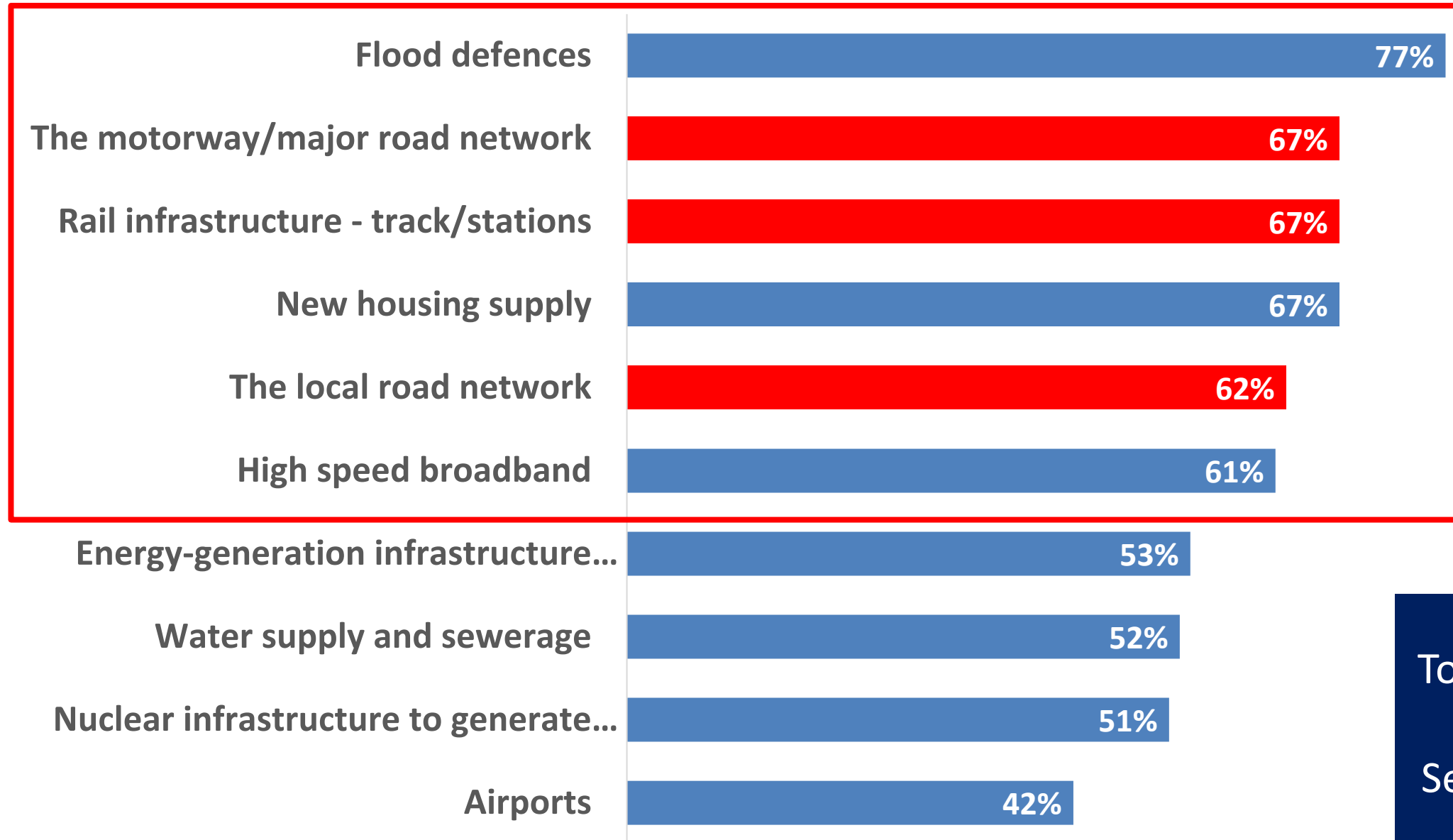
Infrastructure: Meaning & Concepts

Be specific Be concrete

What infrastructure means to people: It's Public and Specific

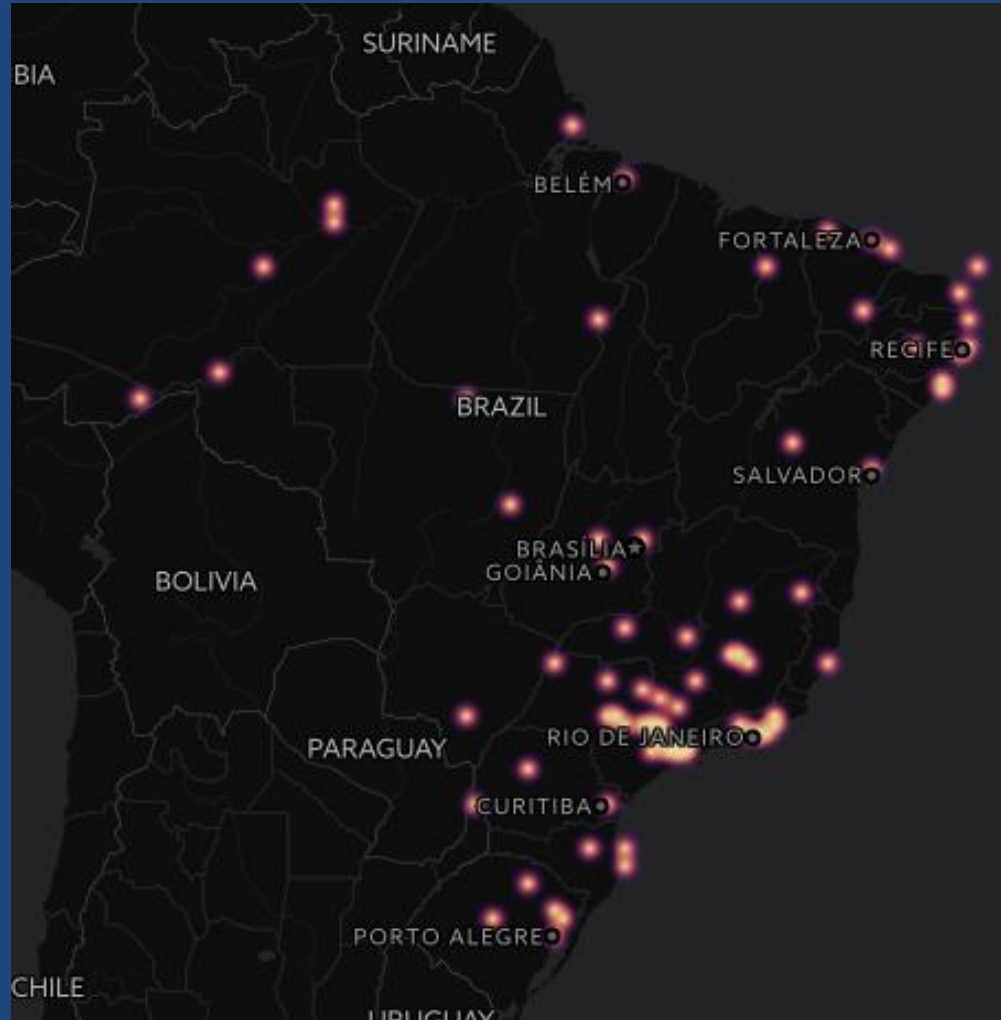


Specific priorities within Infrastructure

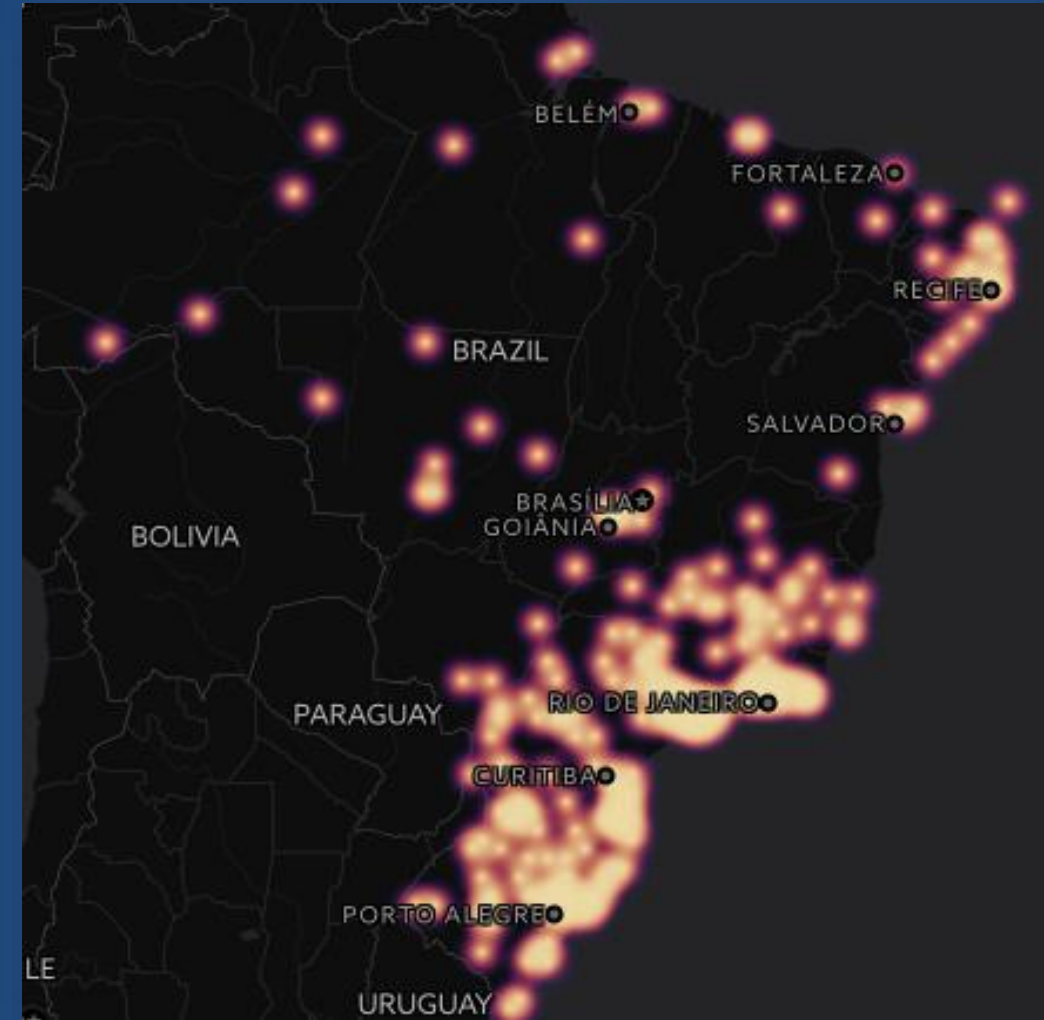


Top Global Priorities:
Water Supply &
Sewerage and Roads

Discussions on Infrastructure



Discussions on concrete projects associated with infrastructure



**Infrastructure is a bad
word in Brazil!**

**All companies in the infrastructure industry
are involved in corrupt practices**



58%

**Should continue with the
investigations, whatever the
cost?**

95%

And Problem with the Messengers

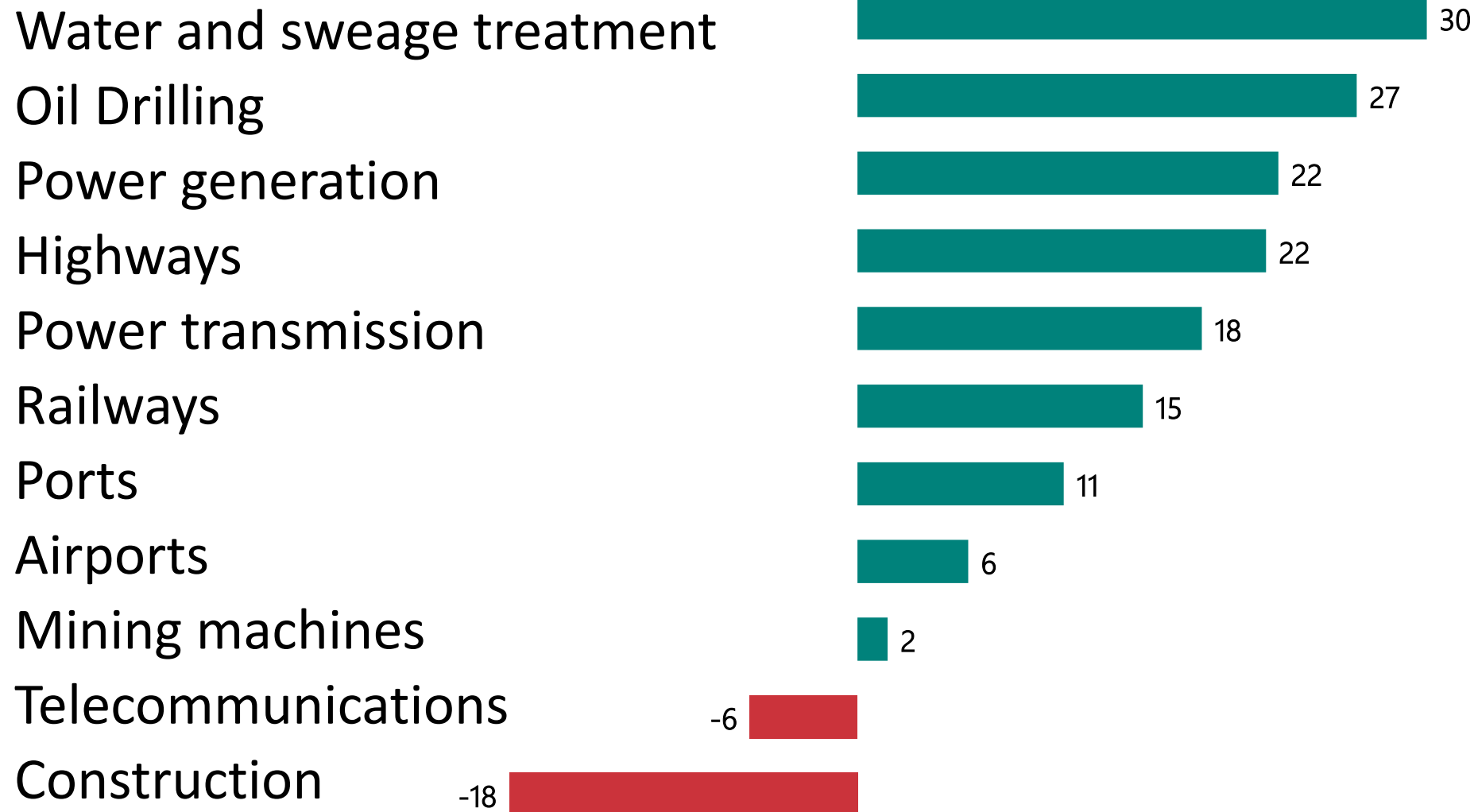
Government, however, does not have the credibility

	Global	Latin America	Brazil	USA
Political Parties	14%	10%	9%	18%
The Government	24%	23%	13%	30%
The Media	27%	32%	30%	27%
Big Companies	32%	36%	43%	36%
Banks	34%	41%	34%	42%
International Institutions	36%	48%	42%	32%
The Justice System	38%	20%	41%	47%

**What do we do in such a
low credibility
environment?**

Government still seen as the primary stakeholder in infrastructure (Government-Private Sector)

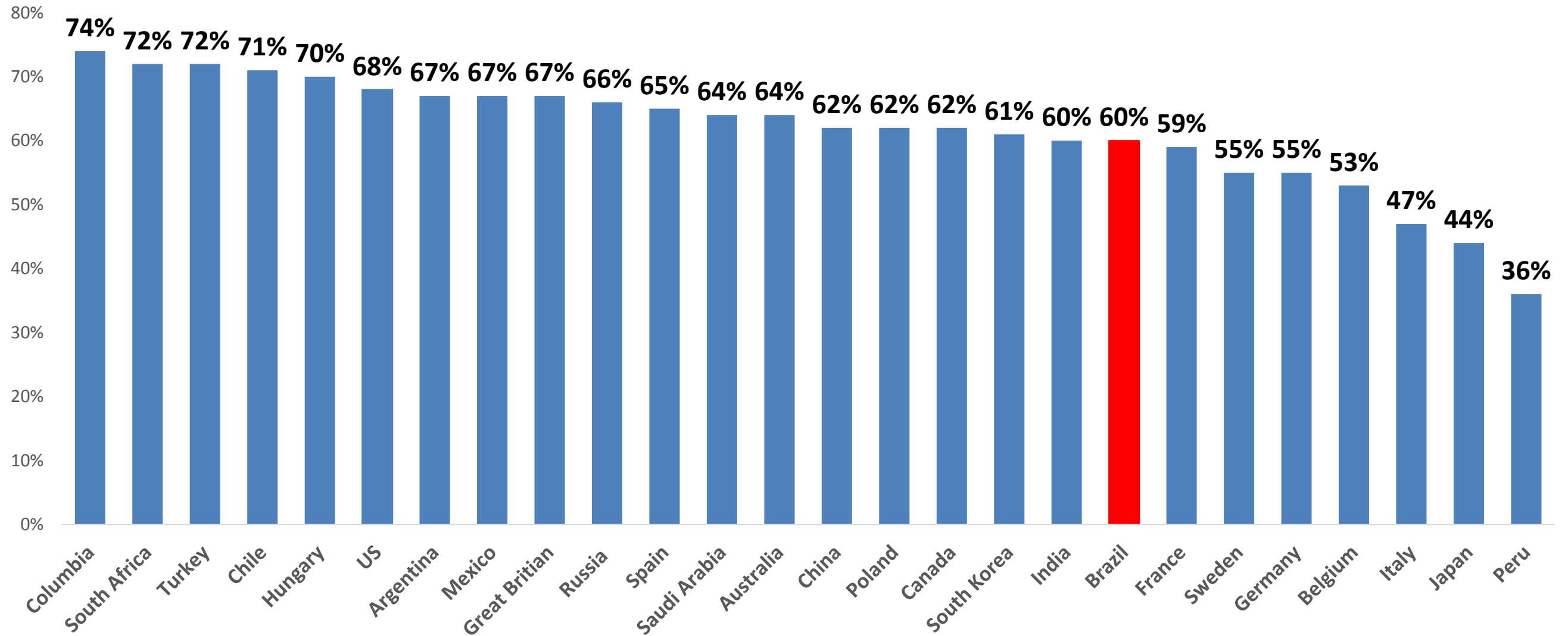
% who is primarily responsible



Building credibility through concrete measures

Transparency is key

Local communities' views on plans for infrastructure should be heard properly, even if it means delays. *Agree.*

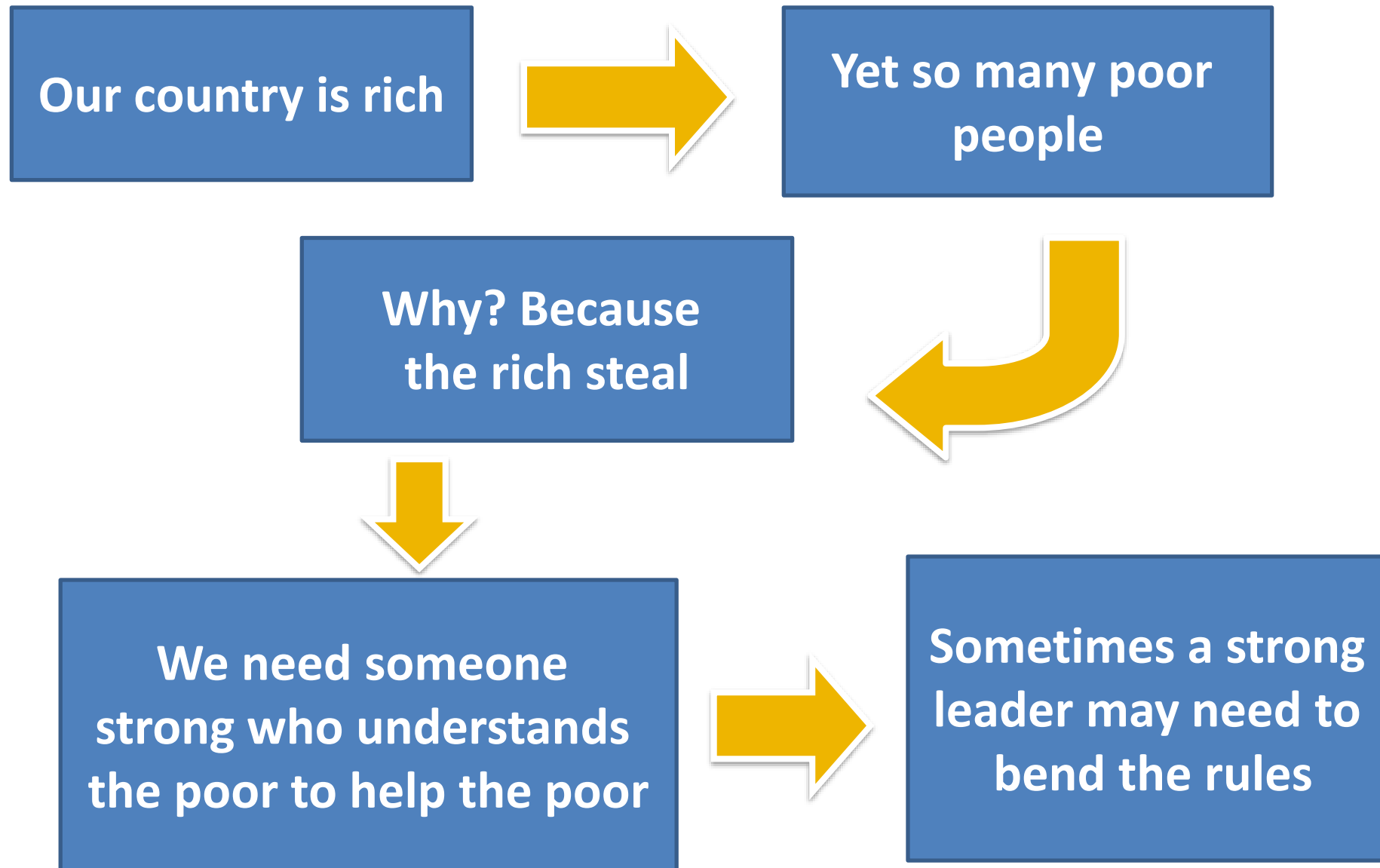


Anti-System Sentiment: Brazil and the World

Global Belief in a Broken System: Populist Politics

	Global	Latin America	Brazil	USA
Traditional parties and politicians don't care about people like me	63%	71%	68%	67%
Economy rigged for advantage of the rich and powerful	69%	74%	72%	70%
When jobs are scarce, employers should prioritize hiring people of this country over immigrants	53%	59%	53%	58%
Need a strong leader to take it back from the rich and powerful	63%	70%	66%	69%

System is Broken: Caudillo Syndrome



Summary

- It is a Jobs and Economy & Quality of life Agenda
- Infrastructure is not high on the priority list. Need to make it so.
 - How: Frame infrastructure in economic terms
 - Increase the conversation
 - You have credibility gap and must recognize it
- New Global Political Super-Cycle: Anti-System & Populism



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