

## Abaco's New Qual Research Facility in the Heart of São Paulo

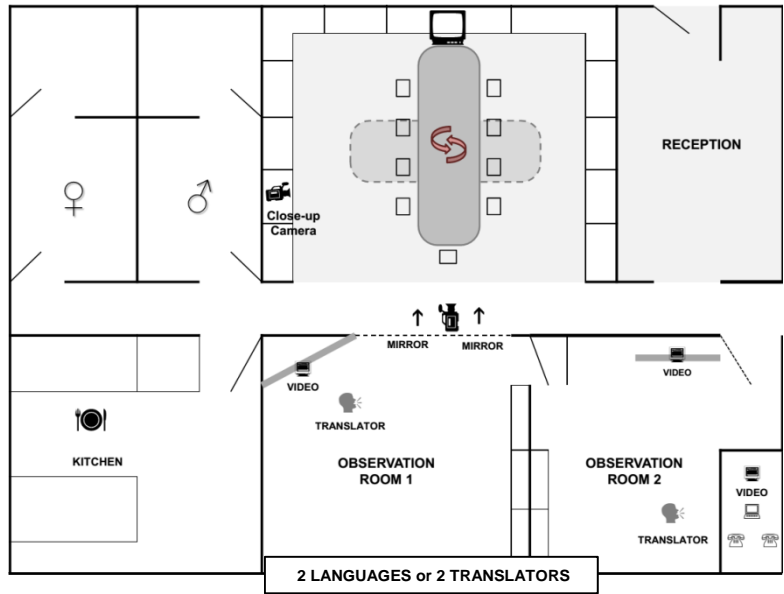
The research industry has a new facility for focus groups and IDIs at the center of Avenida Paulista, business heart of São Paulo. It is near top hotels, hospitals and restaurants, and adjoins Trianon Park and MASP museum.

On the technical side, ÁBACO-LAB has everything demanding international clients need.

The most experienced users say:

*"I thought it was an excellent idea to create a lab at Abaco.... Access is easier for participants (close to subway), the room is comfortable and spacious. Video and audio recordings are great and I see the image quality is very good"* (MLH, Senior Moderator).

*"One of the best sound systems I've used"* (LC, Simultaneous Translator).



## Rapid increase in cellphone lines, Explained

The Center of Applied Technology Information (FGV-EAESP) reports that Brazil attained mobile penetration of 158%, vs. 156% in the US. "If someone said this would happen 10 years ago I'd say they were crazy" said the study coordinator.

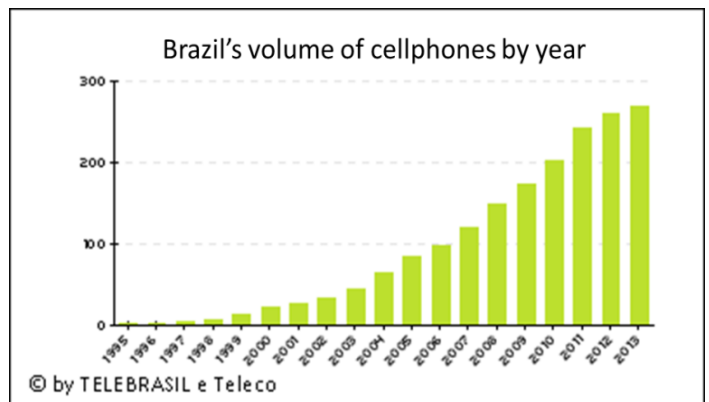
Why? It occurred because of pricing. The boom of cellphone purchases among Brazil's lower-income strata leverages prepaid plans. Calling different carriers or fixed phones is costly, so consumers carry 2-3 pre-paid or multi-chip phones to call within-carrier.

The study also counted 136 MM computers and similar devices in Brazilian companies and homes, including 18 MM tablets. Computer density of 67% relative to population is higher than the world index of 49%, but far below USA density of 128%.

FGV-EAESP estimates 2014 sales of 25 MM units. Computers in Brazil might surpass 200 MM by 2016, almost one per inhabitant.

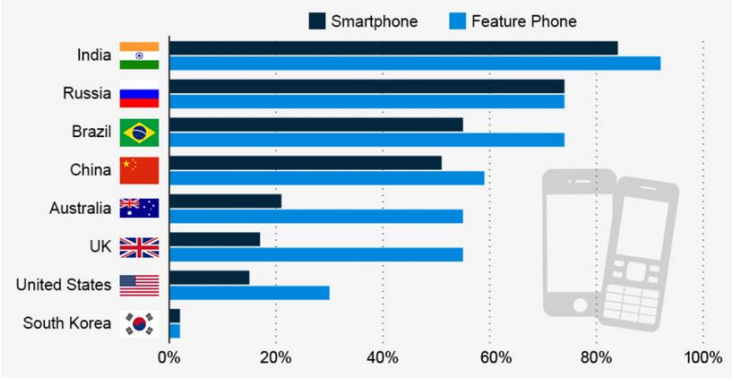
Powered by World Cup, TV penetration of 97% should near 100% in 2014.

Source: Metro

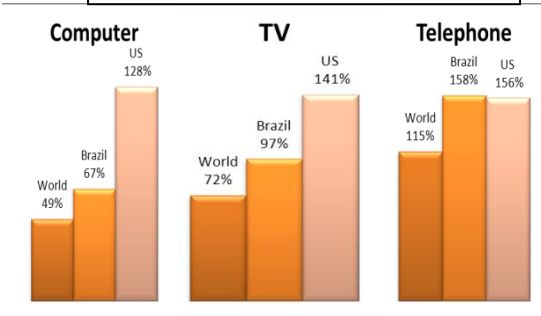


## BRIC Consumers Prefer Prepaid Mobile Plans

Percentage of mobile phone owners using a prepaid plan in 2012



### Product Density vs. Population



REGIONS



FAMILY FARMING

AGRICULTURAL PRODUCTION



DENSITY



GDP



INFANT MORTALITY



Ministry of Health study shows Hypertension is a growing threat. Today 25% of Brazilians have Arterial Hypertension.

There is a stunning inverse correlation with education. Among people with up to eight years of formal education, 38% suffer from hypertension, while only 14% of those who studied 12+ years are hypertensive.

Only One in Eight Brazilians Is a Smoker, a Shrinking Minority

Source: Ministry of Health

A Health Ministry survey of 45,000 adults 18+ revealed a significant drop in the proportion of smokers, from 15% to 12%, between 2006 and 2013.

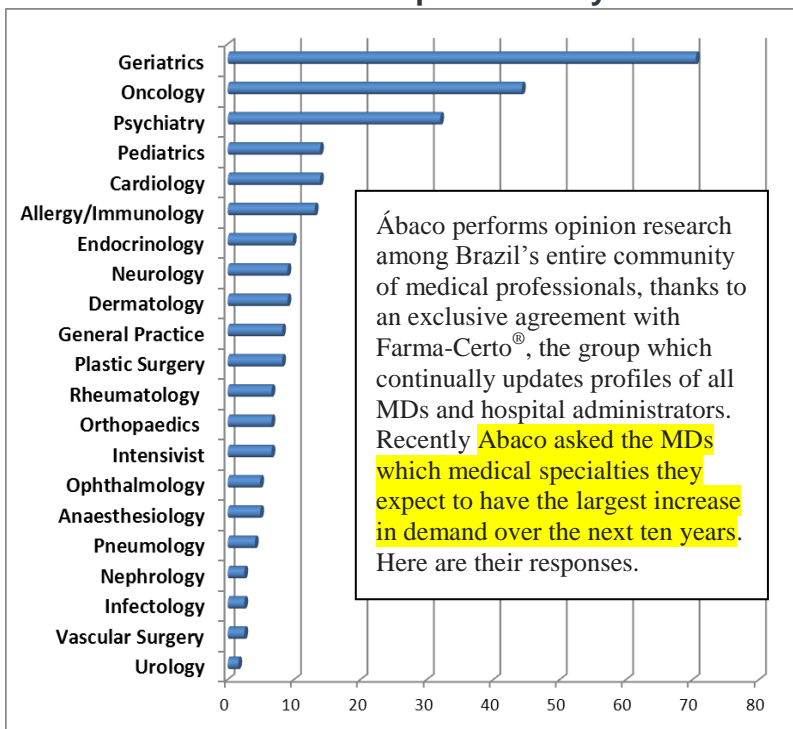
Demographics define the habit: the typical smoker could be characterized as being male, less-educated, and is most likely to reside in the southern capital of Porto Alegre, as contrasted with women, those with higher education and residents of Salvador.

By Gender	Men: 15%	Women: 9%
By Education	Up to 8 years: 16%	12 years or more: 9%
By City (highest and lowest)	Porto Alegre: 18%	Salvador: 6%

Brazilian State Capitals by Population and Number of Formal Companies

City	Population (IBGE 2010)	# of companies (IBGE 2011)
São Paulo	11.253.503	554.344
Rio de Janeiro	6.320.446	191.311
Salvador	2.675.656	58.405
Brasília	2.570.160	91.024
Fortaleza	2.452.185	63.646
Belo Horizonte	2.375.151	105.019
Manaus	1.802.014	23.827
Curitiba	1.751.907	98.575
Recife	1.537.704	41.220
Porto Alegre	1.409.351	86.905
Belém	1.393.399	18.893
Goiânia	1.302.001	54.691
São Luis	1.014.837	19.585
Maceió	932.748	16.370
Teresina	814.230	16.922
Natal	803.739	22.157
Campo Grande	786.797	22.655
João Pessoa	723.515	17.438
Aracajú	571.149	14.108
Porto Velho	428.527	9.848
Florianópolis	421.240	24.152
Macapá	398.204	6.203
Rio Branco	336.038	5.860
Vitória	327.801	18.504
Boa Vista	284.313	5.283
Palmas	228.332	6.530

Most Needed Medical Specialties by 2024



Ábaco performs opinion research among Brazil's entire community of medical professionals, thanks to an exclusive agreement with Farma-Certo®, the group which continually updates profiles of all MDs and hospital administrators. Recently Abaco asked the MDs which medical specialties they expect to have the largest increase in demand over the next ten years. Here are their responses.

The largest number of dentists in the world

19% of all dentists are in Brazil. There are approximately 220,000, 57% concentrated in three southeastern states: São Paulo 33%, Minas Gerais and Rio de Janeiro 12% each. Women number 51%. The 197 university dentistry programs graduate 9000 new professionals annually. Brazil's lower-income northern region lacks dentists.

Source: CIOSP