

Brazilian Elections

15th Edition

September 27, 2022

PATRI does not conduct public opinion polls. The sources of the polls are always mentioned alongside the data or its graphical representations. Brazilian legislation determines that, in election years, only polls registered with the electoral justice five days in advance may be released.

NEXT STEPS IN THE ELECTORAL CALENDAR

2022

OCT 1

Last day, until 10pm, to distribute printed campaign material or hold other campaign events, like marches

OCT 2

First Round



OCT 7

Start of runoff electoral advertisements on TV and radio

Runoff presidential debates

OCT 28

Last day of runoff electoral advertisements on TV and radio

OCT 30

Runoffs



SEP 29

Last first round debate, on TV Globo.

Last day of electoral advertisements and debates on radio and TV and for holding campaign rallies

OCT 17: Rede TV debate

OCT 22: CNN, Veja, SBT, O Estado de S. Paulo, NovaBrasil FM and Terra joint debate

OCT 28: TV Globo debate



PRESIDENTIAL CAMPAIGNS

JAIR BOLSONARO (PL)

Throughout the campaign, he has used advertisements and debates to try to attract the groups of voters among whom he performs most poorly: women and the poor (with household incomes up to twice the minimum wage). Having failed to improve in these two demographics, he now focuses his fire on Lula, his main opponent, associating him with corruption scandals and comparing the PT to leftist governments in Cuba, Venezuela, and Nicaragua. He also invested heavily in the September 7 demonstrations to exploit the patriotic sentiment and project an image of popular backing.

Last week, Bolsonaro transformed his speech at the United Nations into an electioneering campaign event, speaking directly to the domestic audience and trying to paint a positive picture of Brazil's economic performance during the pandemic.

He has avoided rallies in larger cities, concentrating in rural areas, carrying out his traditional motorcycle parades, and reinforcing his live broadcasts on social media.



Photo: Veja

PRESIDENTIAL CAMPAIGNS

LULA DA SILVA (PT)

With his time on TV and radio, Lula has harshly criticized Bolsonaro's management of the pandemic and the economy.

He also used part of his advertisements to defend himself from corruption accusations, arguing he was the victim of judicial persecution by Operation Carwash and its leader, justice Sérgio Moro – who later served as Bolsonaro's Minister of Justice. Recently his campaign has been exploring the scandals involving Bolsonaro and his family (ghost employees real estate purchases in cash). It is also investing in a campaign for a “useful

vote” from voters of other candidates to defeat Bolsonaro in the first round.

Drawing closer to the center, he held a meeting with Henrique Meirelles, former Minister of Finance and Central Bank President, who announced his support for Lula's bid. The event had positive reverberations for the market's nerves, acting as a signal that a new Lula administration would be committed to fiscal responsibility.

His vice-presidential candidate, Geraldo Alckmin, has also intensified overtures towards the private sector, especially agribusiness leaders.



Photo: Poder 360

PRESIDENTIAL CAMPAIGNS

CIRO GOMES (PDT)

In a campaign completely polarized by Lula and Bolsonaro, Gomes has not given up on making promises and presenting proposals to try and stand out from his opponents. He presented a “National Development Program” with a developmentalist bent and, in debates, emphasized the anti-greed law, the end of the spending cap, renegotiation of household debt, and tax reform.

He goes beyond the BRL 600 income program promised by Lula and Bolsonaro, pledging a minimum income program of BRL 1000.

Having failed to grow in the polls, Gomes is now within the margin of

error of Simone Tebet. Isolated in the left, even within the PDT, and with signs of deflation by the “useful vote” campaign, he has ramped up attacks on Lula, calling him a “thief” and refusing to support him in a potential runoff against Bolsonaro. About 40% of Gomes voters are open to voting for Lula in the first round for the sake of pragmatism.

Gomes has also claimed that the Bolsonaro administration’s “mediocrity and corruption” brought Lula back to life as an electoral figure.



Photo: Poder 360

PRESIDENTIAL CAMPAIGNS

SIMONE TEBET (MDB)

Tebet, who claims to represent the “third way” between Lula and Bolsonaro, has also failed to break the polarization established since May 2021 – when the Supreme Court overturned Lula’s convictions and allowed him to run.

Finishing the race ahead of Gomes would already be a win for Tebet – and might happen, despite about 30% of her voters being willing to switch to Lula in the name of a “useful vote” to defeat Bolsonaro in the first round.

In advertisements, debates, and interviews, she presents herself as the candidate of national

pacification and explores her trajectory as a professor and politician to attract female voters, among whom Bolsonaro performs poorly.

Her best campaign moments came in the beginning of the official campaign period with the interview on Brazil’s main news program, TV Globo’s *Jornal Nacional*, and the first debate, held by Band. After this period, she grew slightly in the polls, but it did not go any further. With little support from her own party and low social adhesions, the “third way” failed to take off in 2022.

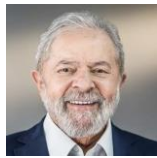
Absence of proposals and no weight on electoral strategy

- With lower viewership, the two hours of the second debate can be summed up with Felipe D'Ávila's closing statements: "Up to now, we have not discussed anything on how Brazil will start growing again, creating incomes and jobs."
- Lula's absence was criticized by all candidates, but the low viewership shielded him. During the debate he held a rally in Grajaú, a working-class neighborhood on the periphery of São Paulo, alongside Marina Silva.
- Bolsonaro did not make any serious stumbles – unlike in the first debate, when his attacks against journalist Vera Magalhães helped wear out his image with women voters.
- With low voting intention and little know by the public, other candidates (Gomes, Tebet, Thronicke, D'Ávila, and Kelmon) wore stickers with their electoral numbers – the maximum they were able to to extract from the visibility of the debate.



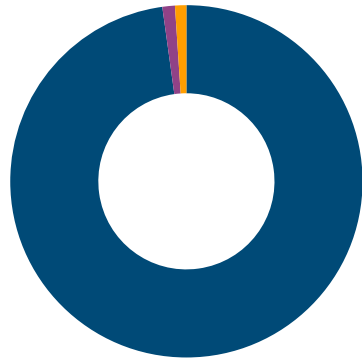
Photos of Ciro Gomes, Jair Bolsonaro, Soraya Thronicke, Felipe D'Ávila and Padre Kelmon: Poder 360. Photo of Simone Tebet: f5 online

CAMPAIGN FINANCING- *Revenues*



LULA
PT

Updated
Sept. 22



BRL 90 m

BRL 88.1 m PT party

BRL 1 m PSB party

BRL 935.1 k Individual donations
and collective financing



BOLSONARO
PL

Updated
Sept. 22



BRL 31.2 m

BRL 17 m PL party

BRL 1 m PP party

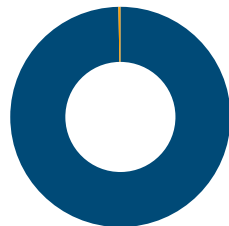
BRL 13 m Individual donations
and collective financing

BRL 90 k Others



CIRO
GOMES
PDT

Updated
Sept. 21



BRL 33.4 m

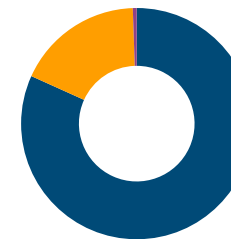
BRL 33.3 m PDT party

BRL 97.7 k Individual donations
and collective financing



SIMONE
TEBET
MDB

Updated
Sept. 14



BRL 36.7 m

BRL 30 m MDB party

BRL 6.5 m PSDB party

BRL 200 k Sen. Tasso Jereissati*

**Until the last update, Sen.
Jereissati was the only individual
donor to Tebet's campaign*

CAMPAIGN FINANCING- *Spending*

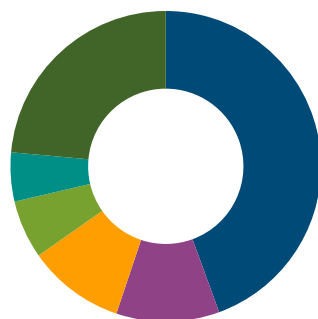
Spending cap for presidential bids: **BRL 88,944,030.80**



LULA
PT

Updated
Sept. 22

BRL 56.9 m



64% of the limit

BRL 25.3 m TV and radio advertisements production

BRL 6.1 m Print advertisements

BRL 5.5 m Services provided by third parties

BRL 3.5 m Sticker advertisements

BRL 2.9 m Legal services

BRL 13.4 m Others

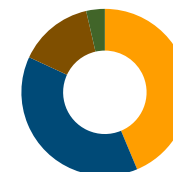


BOLSONARO
PL

Updated
Sept. 22

BRL 15.2 m

17% of the limit



BRL 6.6 m Services provided by third parties

BRL 5.8 m TV and radio advertisements production

BRL 2.2 m Electoral polls or tests

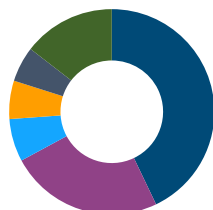
BRL 546.7 k Others



CIRO
GOMES
PDT

Updated
Sept. 21

BRL 24.6 m



28% of the limit

BRL 10.6 m TV and radio advertisements production

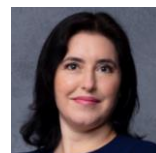
BRL 6 m Print advertisements

BRL 1.7 m Promoted content on social media

BRL 1.5 m Services provided by third parties

BRL 1.4 m Transportation expenses

BRL 3.6 m Others

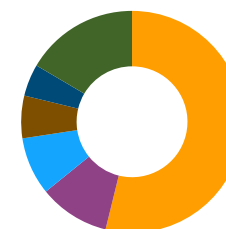


SIMONE
TEBET
MDB

Updated
Sept. 14

BRL 33 m

37% of the limit



BRL 17.7 m Services provided by third parties

BRL 3.4 m Print advertisements

BRL 2.8 m Promoted content on social media

BRL 2 m Electoral polls or tests

BRL 1.5 m TV and radio advertisements production

BRL 5.4 m Others

Voting intention – *First round*



Lula
PT



Bolsonaro
PL



Ciro Gomes
PDT

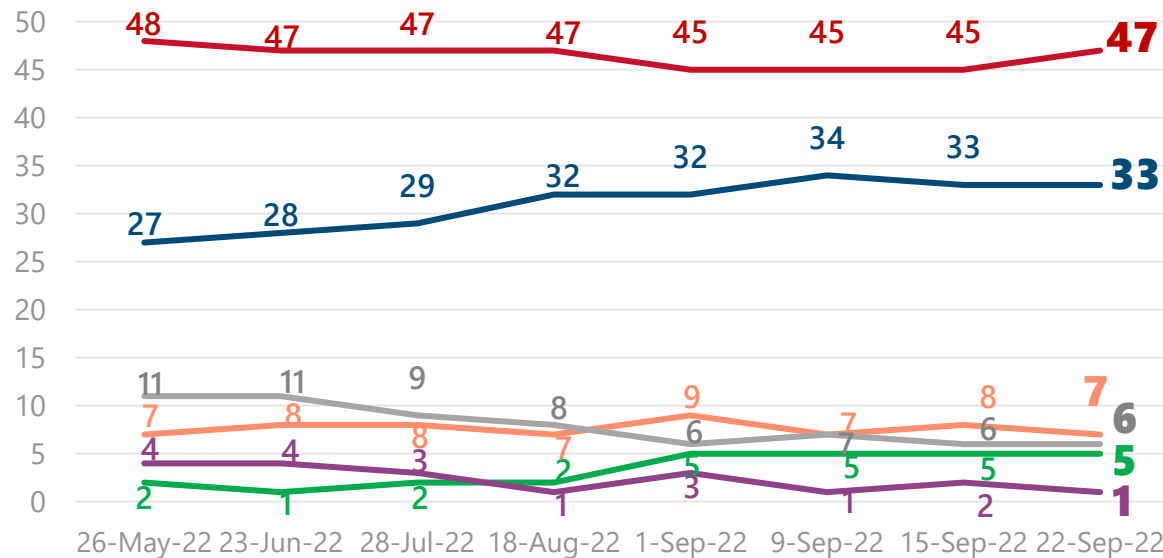


Simone Tebet
MDB

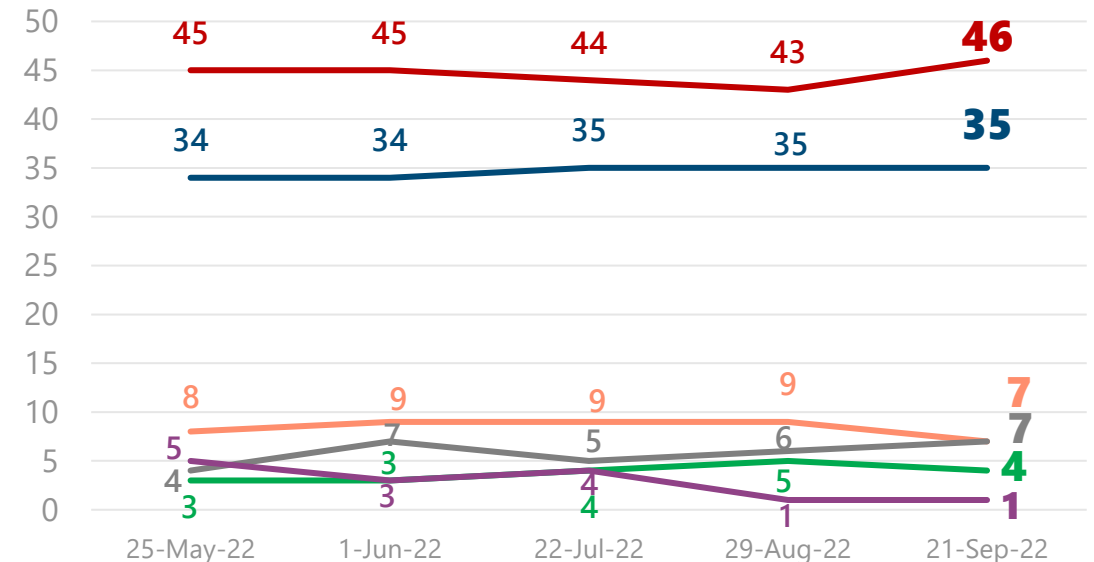
Others

Blank/
Null/DK

DATAFOLHA



IPESPE



The polls released in recent weeks showed an increase in Lula’s lead to Bolsonaro. However, until now, the data still does not clearly suggest a migration of voters from candidates that have failed to grow (Gomes and Tebet) to the two front-runners (Lula and Bolsonaro). With this, the perspectives of a first-round win are still up in the air – it is possible, but still not the most likely scenario.

Voting intention – *Runoff*

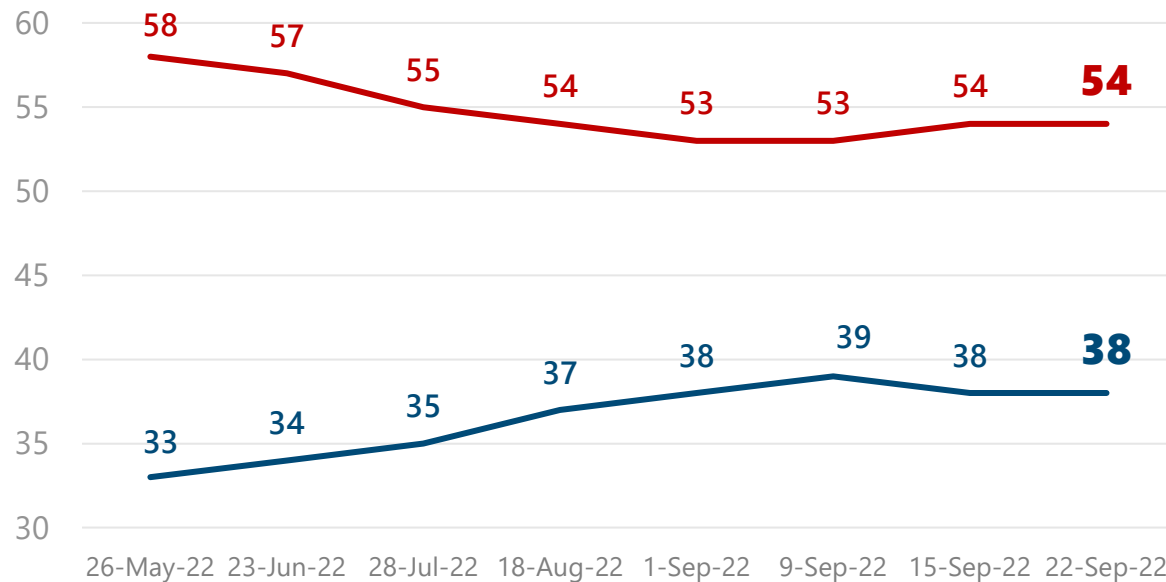


Lula
PT

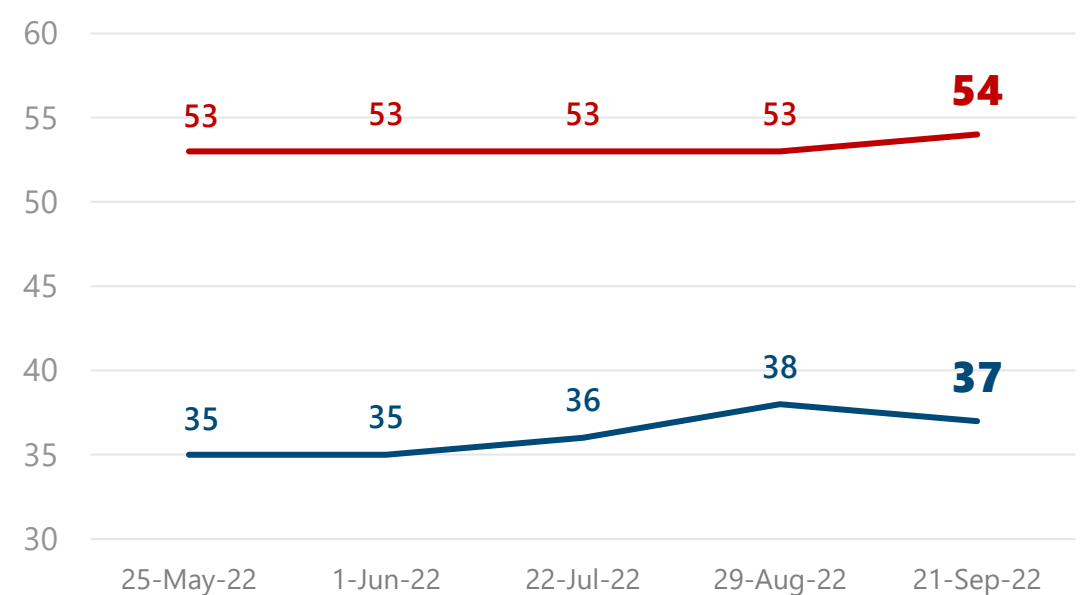


Bolsonaro
PL

DATAFOLHA



IPESPE



This election will have the longest campaign period between the first round and the runoff since 1994, not only due to its duration – four weeks between the two election Sundays – but also proportionally, considering the entire campaign period. This year, there were seven weeks of campaigning by the first round and there will be four more until the runoffs. In 2018, there were seven and three weeks respectively and in 2014 twelve and three.

ELECTIONS | PATRI 2022

PATRI is Brazil's leading public affairs company, with 35 years of experience in helping companies navigate the complex world of public policy, issues management and government relations in Brazil. With a team of over 75 professionals located in Brasília, São Paulo, Belo Horizonte and Washington, DC, PATRI's expertise combines an in-depth understanding of multiple sectors, industries and stakeholders with an exhaustive knowledge of all branches of federal, state and municipal governments. For further information please contact us.



Brasília

patripoliticaspUBLICAS@patri.com.br

SAF Sul Quadra 02, Bloco D

Edifício Via Esplanada, Salas 103 a 106

Fone: (61) 3327-2606 - Fax: (61) 3327-1619

São Paulo ▪ **Belo Horizonte** ▪ **Washington, DC**